Background Information

1. Definition of software categories:

   a) **Institutional**: Used across the institution or is critical to administrative unit operations. Typically, this software is deployed at a high level of the university and has multiple licenses (Examples: Jenzabar, MS Office, Adobe, Canvas).

   b) **Supplemental**: All other software that is not deemed “Institutional” but requires management of licenses, purchasing, and maintenance (Examples: FileMaker, Zoom).

   c) **Open Access**: All software that is free and/or open source. This does not need to be managed by IT (Examples: Google Drive, Drop Box).

2. Management Processes:
   a. USWired, the vendor hired by CIIS to provide information technology support, maintains license data (see detail below).
   b. USWired manages purchases after approvals (see detail below).
   c. The Business Office tracks software purchases within its accounting system in such a way that costs related to each type of software category identified above can be reported on both in detail and in summary reports.

Purchasing Policies and Processes

1. All purchases of institutional and supplemental software (see definitions above) require prior approval and will be processed by USWired, which will apply available nonprofit and educational discounts and secure the best price.

2. Approvals
   a. **Institutional Software**: Subject to approval by the CIIS IT Liaison (currently Chip Goldstein, Associate Provost) and the Chief Technology Officer (currently Damian Cozzi, USWired Vice President for Operations)
   b. **Supplemental Software** (previously approved or new requests): Subject to approval by the CIIS IT Liaison (currently Chip Goldstein, Associate Provost)
   c. **Open Access Software**: Not subject to approval.
Management Procedures

1. USWired will maintain the following license data for each software package/license(s) purchase:
   a. Name of software corporate license holders
   b. Name of software
   c. General description of software purpose
   d. Number of licenses/computers installed
   e. Administrative/academic groups using software
   f. Software company account contact information (if applicable)
   g. Record of license number(s) (if applicable)
   h. Cost structure
   i. Date of purchase
   j. Date of expiration of license(s)
   k. Copy of contracts/evidence of purchases
   l. Notes explaining any circumstances necessary to understand purchases