

# LCIS Software/Hardware Purchasing and Installation Guidelines

Use this guide for suggestions on the steps needed to purchase new software or hardware and submit a request to have them installed.

- Determine your software needs and secure a quote from your chosen vendor or you may ask LCIS for assistance in securing your quote for standard software and hardware.
- Forward your quote to LCIS for review. If the purchase falls under LCIS standard equipment, a checklist will be returned to you. Attach the checklist and your quote to your requisition and process.
- If the hardware or software does not fall under LCIS standard equipment the purchase request may need to be reviewed and approved by the Data Processing Board. Please review the attached IT Procurement Policy for guidelines.
- When the purchase order is issued, forward a copy of the purchase order (or invoice), along with the Software or Hardware installation form to LCIS Help Desk with a request to have the installation completed. A work order will be created for your request. See below for required information on the PO or invoice. Software will not be installed without license proof of purchase.
- LCIS technical staff will schedule an appointment to complete the installation for you.
- It is highly recommended that you use the attached Software Tracking Spreadsheet to keep a record of all software licenses purchased and installed for your department. This form may be required for certain software installations to show the quantity of licenses purchased and who those licenses are assigned to.

Purchase Order or Invoice is your proof of license purchase for software. These documents must include the following information:

- Specific name of software being purchased (Standard, Pro, etc.)
- Version of software (year)
- Quantity of licenses purchased

## Attachments:

- Software Installation Request Form
- Hardware Installation Request Form
- Software Tracking Spreadsheet
- Lucas County IT Procurement Policy



www.co.lucas.oh.us

Lucas County Information Services

Anita Lopez, Lucas County Auditor and Secretary of the Data Processing Board

One Government Center Suite 400 Toledo, OH 43604

419.213.4025 Voice 419.213.4024 Fax

LCIS End User Hardware Installation Form

Date:
User Name:
Phone: (ext.):
E-Mail Address:
Department:
Location/Building:
Date and Time you will be available for service\*:

\*Please note: You must be present for service to be performed. Your username and passwords may be necessary to complete service. For security reasons we ask user not to post their user information and passwords in public view.

Type of Installation (Check all that apply):

PC Laptop Monitor Network Printer Standalone Printer

Other device (please specify):

Is this brand new (still in factory box) equipment (check one)? Yes No

If NO, Please indicate the make and model of this equipment:

Make (manufacturer): Model:

Is this device currently being used by another employee? Yes No

If YES, Please list the users name, location and phone number:

Does device need to be connected to the county's network?\* Yes No

PC Laptop Monitor Network Printer Standalone Printer
Other device (please specify):

\*Please note: If you are unsure of the network status for this device please contact your department head, supervisor, or LCIS for additional help. (LCISHelpDesk@co.lucas.oh.us or 419.213.4037)

Please use the Software Request form to list All software/programs that LCIS Tech staff will be installing on this device. If you are not sure what Software/programs you may need please contact your supervisor or LCIS for additional assistance.

Please Fax your completed requests to LCIS Help Desk at 419.213.4024

\*\*\*\*IMPORTANT SOFTWARE INFORMATION\*\*\*\*

LCIS staff will NOT install software or programs omitted from @ list. Software installations performed by LCIS must be accompanied by a current license. Software that came preinstalled on your old equipment may not be licensed for use on your new equipment and may be non-transferable. Please check with your department head or supervisor for current license status. LCIS staff will NOT install ANY software that does not have a current license.

For questions regarding service orders or service order status please contact LCIS Help Desk at 419.213.4037 or email lcishelpdesk@co.lucas.oh.us.

**Lucas County IT Procurement Policy**  
**Effective 10/1/12**  
**Revised 5/2/2013**

**Purpose**

In conjunction with ORC 307.84 regarding the Automatic Data Processing Board, the purpose of this policy is to provide further criteria for procurement of and investment in IT hardware, software and related services for all Lucas County offices, departments, and agencies under ADP Board oversight. By definition, these are any officer, department, board, commission, agency, court, or other office of the county, other than a board of county hospital trustees.

**Policy**

- A. Hardware/Software/IT services procurement under \$7,500 only requires informal review by Lucas County Information Services. The Checklist for Hardware/Software/Services will be completed by LCIS management prior to procurement initiation from the requesting county office, department, or agency. Exceptions to this policy are listed in the Exclusions Section at the end of this document.
- B. County offices, departments, or agencies requesting IT procurement of \$7,500 or more will require formal DP Board review and approval along with pricing quotations. Exceptions to this policy are listed in the Exclusions Section at the end of this document.
- C. Any and all hardware procurement which will attach to the Lucas County network must be submitted for review to Lucas County Information Services regardless of dollar value. These can include, but are not limited to PC's, monitors, printers, scanners, multi-function copiers, netbooks, tablets, and smart phones. Formal DP Board approval may be required at the discretion of LCIS management.
- D. IT software purchases of \$5,000 or more (one individual license) must be added to the capital asset base as an intangible asset as soon as the software is placed in service.
- E. IT software purchases or upgrades of \$7,500 or more must have 3 competitive quotations submitted for DP Board review unless the software provider is a sole-source or state term vendor. Purchases of \$50,000 or more must follow Lucas County purchasing policy for appropriate approvals. Exceptions to this policy are listed in the Exclusions Section at the end of this document.

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- F. Software/hardware support renewals whose original purchase date is on or after September 29, 2011 and exceeds the \$7,500 threshold must be submitted for procurement approval to the Data Processing Board. Exceptions to this policy are listed in the Exclusions Section at the end of this document.
- G. If IT procurement approval (formal or informal) is required, it must be obtained prior to creation of the vendor's purchase order.
- H. All compliance to Lucas County's general purchasing policies and practices will apply.

**Exclusions**

The following items are excluded from Data Processing Board review and formal approval (LCIS approval and Procurement Checklist still required):

- Any and all hardware and software purchases or leases which comply with the technology standards set by Lucas County Information Services management. These include but are not limited to Microsoft Office, PC's, laptops, monitors, printers, scanners, multi-function copiers, netbooks, tablets, and smart phones.

The following items are excluded from LCIS review and approval. (No approval required):

- Any and all hardware purchases or leases which will **not** connect to the Lucas County network.
- Any and all hardware or software purchases or leases which do **not** require involvement of Lucas County Information Services to install or maintain.
- Software/hardware support renewals on IT purchases on or after September 29, 2011 that are Ohio state term contract or sole source providers.
- Software/hardware support renewals on IT purchases prior to September 29, 2011.