Purchasing - Requester

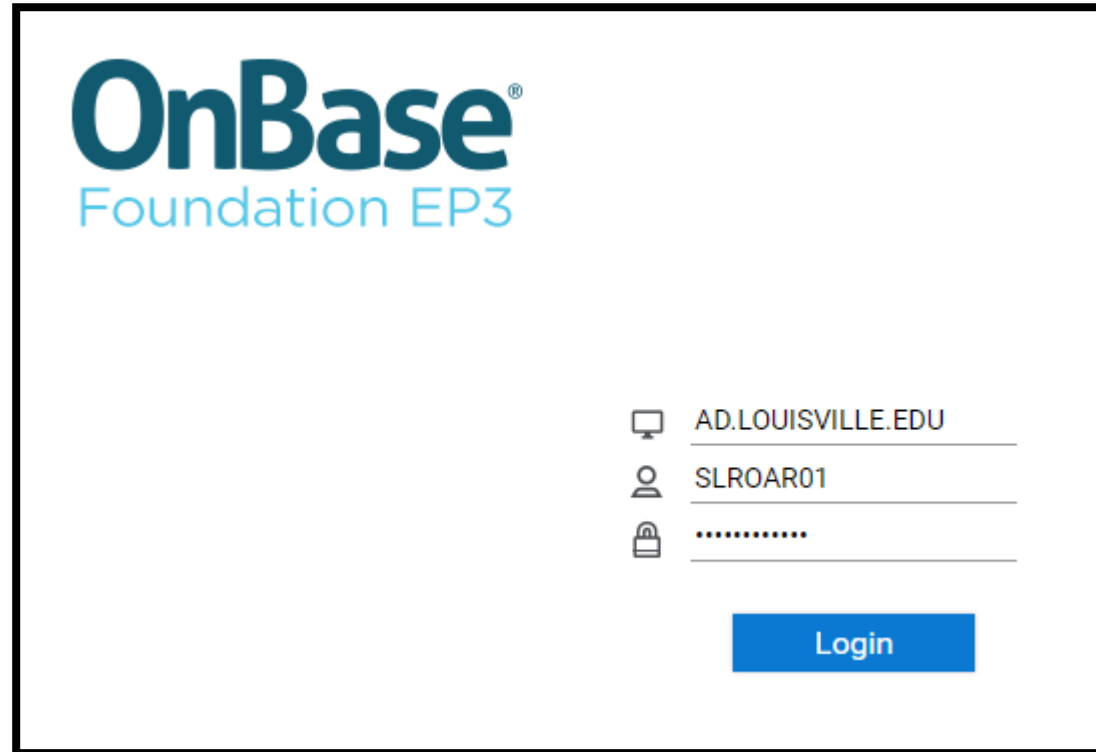*Department Agreements (Software)*

Link to Form

It will open the current form until the updated one is moved to production.

https://onbase.louisville.edu/onbase/UnityForm.aspx?d1=ARZM%2fO86dzisfY3mL7wqJoOvK9jkyh6JTwiJKdCKN%2fDbHGowW6AnxsniYUq%2f%2bVt2KHi5mddFbGTXXKVmAvKSz64qD7OC4QHyj50DShHgMoG6aLL64O7uNj4FyhVW1tr6ofe22s202r3J6jTvJ%2foe%2bCI%3d

Login To Access Form

It will open the current form until the updated one is moved to production.

Request Information

Information will automatically populate

General Information

Information will automatically populate

General Information

Requester Department
IT SERVICES

← Automatically Populated

Requester DeptID
2090000156

Are you submitting request for another department?
NO

← No Your Request

Is this a software purchase?
● Yes
○ No

← Software Request "Yes"

All "Software" purchases require additional approval. *This approval comes from Information Technology and Information Security.* **Someone from from each department will be contacting you and will need additional information.**
To start this process complete the Vendor Assessment Form.

Software Name *

← Add Software Name

Brief Software Description *

← Brief Description

License Term

Comments / Additional Information

Recommended by information should be on the document prior to submission.

Department Vendor Contract (1)

PUR-DA -Vendor Department Agreement
(Pending) new.txt [Remove]

Attach PUR-DA -Vendor Department Agreement

Attach Contract

Are you submitting request for another department?
YES

Select from the list of College / School / Division's

College / School / Divisions
ARTS & SCIENCES

If Yes.
Enter College / School Info

Funding Over 40,000

If software and contract in place. Will follow the software review before going to Purchasing.

A sole source purchase is **one where there is only one vendor capable of providing an item or service**, and therefore it is not possible to obtain competitive bids.

Is this a Sole Source? *

○ Yes
○ No

Do you already have a contract in place? *

○ Yes
○ No

Goes To Purchasing

Is this a software purchase?
● Yes
○ No

Continues With Software Review

Anything over $40,000 and NOT Sole Source needs to be bid.

A sole source purchase is **one where there is only one vendor capable of providing an item or service**, and therefore it is not possible to obtain competitive bids.

Is this a Sole Source? *
● Yes
○ No

Do you already have a contract in place? *
● Yes
○ No

Funding Under 4,500

Anything under 4,500 can be purchased on a ProCard

Funding

Speedtype	Speedtype Category	Account Code	Amount
GB230021	FEDERAL - FY23KY AUTISM TRAINING CENTER	110155 - BOND TRUSTEE CASH ▼	4499	Ren

Purchase Total Amount

Total Amount
4499.00

Do you plan to pay for this with Procard? *
● Yes
○ No

Continues With
Software Review ➡️

Is this a software purchase?
● Yes
○ No

All "Software" purchases require additional approval. *This approval comes from Information Technology and Information Security.* **Someone from from each department will be contacting you and will need additional information.**
To start this process complete the Vendor Assessment Form.

NOTE: Any Federal Funded Positions will be reviewed inside of the ProCard process.

One Funding Source

Enter requested funding information

Product Purchase Information

Because this is a <u>Federal Speetype Category</u> we need you to answer the following questions.

Was this amount included in your budget proposal? *
- ○ Yes
- ○ No

Is the time frame of the Software purchase within the time frame of the award? *
- ○ Yes
- ○ No

Additional FEDERAL Questions →

Funding   Add

Speedtype	Speedtype Category	Account Code	Amount	
GB230021	FEDERAL - FY23KY AUTISM TRAINING CENTER	110104 - BANK 4 - ULF ▼	12000	Remove

Enter Funding →

Purchase Total Amount

Total Amount
12000.00

↑ Speedtype = FEDERAL

↑ Amount

Note: No additional questions if not federal funded.

Multiple Funding Sources

Enter requested funding information

Product Purchase Information

Because this is a <u>Federal Speetype Category</u> we need you to answer the following questions.

Was this amount included in your budget proposal?*
- ○ Yes
- ○ No

Is the time frame of the Software purchase within the time frame of the award?*
- ○ Yes
- ○ No

If cost split between multiple speedtypes.
Please tell us why and how you are splitting the cost.

Additional FEDERAL Questions

Add Additional Funding Lines

Funding   Add

Speedtype	Speedtype Category	Account Code	Amount	
GB230021	FEDERAL - FY23KY AUTISM TRAINING CENTER	110104 - BANK 4 - ULF ▼	12000	Remove
S1070	MISC - CONTRACT TECHNOLOGY SUPPORT	110101 - BANK 1 - CASH CONSOLIDATION ▼	1000	Remove

Enter Funding

Purchase Total Amount

Total Amount
13000.00

Amount

Note: No additional questions if not federal funded.

Software Purchase Questions

Software Purchase Questions

Do you plan to have this product make use of ULink userid/passwords for authentication? *
○ Yes
○ No

Do you plan to use this product to send email claiming to be from any @louisville.edu address? *
○ Yes
○ No

Do you plan to use this product to send email to UofL accounts? *
○ Yes
○ No

Do you plan to receive data from or send data to any other UofL computer system? *
○ Yes
○ No

Is the product locally installed with no access to data by the vendor? *
○ Yes
○ No

Is this product hardware or other service that does not involve any form of data, audio or personal image? *
○ Yes
○ No

If data/audio/image is involved, is it only non-human/non-individual data (e.g. animal, numbers, graphics, music, etc.) *
○ Yes
○ No

Vendor Information

Information About the Vendor and Software / License Term

Vendor Information

Vendor Name *
Hyland

Software Name *
OnBase

License Term
1 Year

Vendor Email *
OnBase@Hyland.Com

Vendor Website Link
Https://www.hyland.com

Request Copy

A copy of the status will be sent to this person or service account

Request Copy

Add name of dept head or anyone needing a copy of the form.

Last Name	Middle Name	First Name
ROARK	LYNN	SHERRY

Email Address
SLROAR01@LOUISVILLE.EDU

Add email address of service account(s) needing a copy of the form.

Service Account Email

Service Account Email

Software Review Started

Requester Confirmation Email With Dashboard Link

DA Request # DA-5214-23 (ROARK, IT SERVICES) Started Review — **Purchasing Request Number and Requester Information**

P purchase@louisville.edu
To 🔴 Roark, Sherry

↩ Reply ↩ Reply All → Forward [Teams] ⋯

Mon 11/7/2022 1:25 PM

Start your reply all with: [Thank you!] [Approved.] [Received, thank you.] ⓘ Feedback

Dear SHERRY ROARK,

Request # DA-5214-23 has started the software review process.

Use this link to access the software status dashboard:

https://onbase.louisville.edu/ReportingViewer/viewer.aspx?enc=AYQ8oPm3AUUZmjnqMc9uC4YfgaltzrRQbYAkHEaRK2%
2fi8GXtzgLcMddWLRqDEuElZ9l3QSvywpgVhIuX0HhazrIHRBghGNMXNAJPRgh5f57oSIyWycIQZUR%2b5fNtcbGFQgm8RWP3P8DTuVqnN2XeLt0tCzGJZ6FOpqcIz4Sk%2fDFpcJmOx55TAxTgVM%2b%
2fZoFcJePQUeY9mdQOelewilRpRlSPF%2flHJGZGp3F1i8CSAGn1

Thank You,

Procurement Services

Dashboard - Monitor Review Progress

Dashboard (Review Status)

All software requests will show on this dashboard until complete (link to dashboard below)

https://onbase.louisville.edu/ReportingViewer/viewer.aspx?enc=AYQ8oPm3AUUZmjnqMc9uC4YfgaltzrRQbYAkHEaRK2%2fi8GXtzgLcMddWLRqDEuElZ9l3QSvywpgVhIuX0HhazrIHRBghGNMXNAJPRgh5f57oSIyWycIQZUR%2b5fNtcbGFQgm8RWP3P8DTuVqnN2XeLt0tCzGJZ6FOpqcIz4Sk%2fDFpcJmOx55TAxTgVM%2b%2fZoFcJePQUeY9mdQOeIewilRpRlSPF%2flHJGZGp3F1i8CSAGn1