

Procedures for procuring New Software and Software Renewals

New Software Purchase

Step 1: Prepare a requisition for new and renewal software purchases through UCMarket using the following account and commodity codes:

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 1731300 - Draft Requisition

Shopping Cart for Lisa Butler

Name this cart: 2016-12-15 ljbutler.01

1 Item(s) for a total of **4,600.00** USD
 subtotal: 4,600.00 USD
 estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Have you made changes? **Update**

Cengage Learning more info... **Add Non-Catalog Item**

Product Description	Unit Price	Quantity	Total
Item added on Dec 15, 2016 Math Learning Software for WCM 201 Computer Lab Commodity Code: 205-73 Software Taxable: <input type="checkbox"/> Capital Expense: <input type="checkbox"/>	4,600.00 USD 1/EA	1 Update	4,600.00 USD

Click Proceed to Checkout

General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Terms and Conditions Final Review

You have completed the required information in this step. At this point, you can do the following:
 Proceed to the next step: **Internal Notes and Attachments**. Go straight to the end: **Final Review**.

Return to shopping cart Continue Shopping

Place Order Assign Cart

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing **Accounting Codes** Supplier Info Taxes/S&H

Hide value descriptions

Accounting Codes

These values apply to all lines unless specified by line item

Chart	Fund	Organization	Account	Program	Activity
C	100010	501010	750936	6300	no value
Chart C	General Unrestricted Fund	Procurement	Computer Software < \$5000	General Admin & Logistical Services	

For selected line items: **Add to Favorites** **Go**

Cengage Learning more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Math Learning Software for WCM 201 Computer Lab		1/EA	4,600.00	1 EA	4,600.00 USD

Accounting Codes (same as header)

Supplier subtotal: 4,600.00
 Shipping: 0.00

For new software, please use the account code of 750936. Once you have reviewed, please proceed to the next step Internal Notes and Attachments.

Step 2: Attach the quote and applicable license agreement to that requisition and submit the requisition for approval.

Requisition	PR Approvals	PO Preview	Comments	Attachments	History
Summary	Shipping	Billing	Accounting Codes	Supplier Info	Taxes/S&H

Internal Notes and Attachments ?	
These values apply to all lines unless specified by line item	
Internal Note	<i>no note</i> edit
Internal Attachments	
Add Attachments	

Step 3: Review your order and submit your requisition for approval.

✓ General
✓ Shipping
✓ Billing
✓ Accounting Codes
✓ Internal Notes and Attachments
✓ External Notes and Attachments
✓ Terms and Conditions
✓ Final Review

[Place Order](#)
[Assign Cart](#)

[Return to shopping cart](#)
[Continue Shopping](#)

✓ **All done! The required information has been completed and this request is ready to be submitted.**

Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition

PR Approvals

PO Preview

Comments

Attachments (2)

History

Summary

Shipping

Billing

Accounting Codes

Supplier Info

Taxes/S&H

Hide header Hide value descriptions

General	Shipping	Billing
Cart Name: 2016-12-15 ljbutler 01 edit	Ship To edit	Bill To edit
Description: <i>no value</i>	Attn: Lisa Butler	Accounts Payable
Priority: Normal	Dept: Procurement	660-543-4700
Prepared by: Lisa Butler	Room: 116	Administration Bldg. 316
Prepared for: Lisa Butler	Central Receiving	Warrensburg, MO 64093-5299
	108 West South Street	United States
	Warrensburg, MO 64093	
	United States	
	Delivery Options edit	Credit Card Info edit
	Expedite: x	No credit card has been assigned. manage your cards...
	Ship Via: Best Carrier-Best Way	
	Requested Delivery Date: <i>no value</i>	View/edit by line item...

Accounting Codes [?](#)

Chart	Fund	Organization	Account	Program	Activity
C	100010	501010	750936	6300	<i>no value</i>
Chart C	General Unrestricted Fund	Procurement	Computer Software < \$5000	General Admin & Logistical Services	

Internal Notes and Attachments	External Notes and Attachments
Internal Note: <i>no note</i> edit	Internal Note: Note to all Suppliers edit
Internal Attachments: Add Attachments	Internal Attachments: Attachments for all suppliers Add Attachments
Cengage Learning ... (12k) Remove	Cengage Learning ... (12k) Remove

Terms and Conditions [?](#)

PO Clauses: [edit clauses...](#)

- 100 FACTORY DEFECTS
- 200 REFUSING DELIVERY
- 300 INSPECTION/ACCEPTANCE

[view all clauses - \(6\)](#)

Supplier / Line Item Details [?](#)

Hide line details For selected line items [Add to Favorites](#) [Go](#)

Cengage Learning more info...	Contract: <i>no value</i> edit
	PO Number: To Be Assigned
	Account Code: <i>no value</i>
	Pricing Code: <i>no value</i>
	Quote number: <i>no value</i>

add non-catalog item for this supplier... [View/edit by line item...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Math Learning Software for WCM 201 Computer Lab more info...		1/EA	4,600.00	1 EA	4,600.00 USD
Taxable: x		Internal Note: <i>no note</i>			
Capital Expense: x		Internal Attachments: Add Attachments			
Commodity Code: 205-73 Software		External Note: <i>no note</i>			
PO Clauses: <i>no clause</i>		Attachments for supplier: Add Attachments			
Supplier subtotal					4,600.00
Shipping					0.00
Handling					0.00
Supplier total					4,600.00USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	4,600.00
Shipping	0.00
Handling	0.00
Total	4,600.00 USD

Software Purchase Procedure Dec 2016
Version 1

The requisition will route through the Office of Technology for approval. The Office of Technology will review your requisition and contact you if there are any questions about your purchase. If the software is deemed non-compatible with the campus infrastructure, the requisition will be returned to you with an explanation. Note: The Technology Support Center will also create a ticket for the installation of your software at this point, and will probably send you some questions regarding the installation locations for your software purchase.

Step 4: Once the requisition appears in the “Procurement Queue”, the Office of Procurement will work with Legal Affairs for review and approval of the End User License Agreement and any other required legal documents. Note: If the vendor does not accept the revised terms and conditions and this procurement is necessary for the department’s operations, an email (and signature on the EULA) will be required from either the Dean or the Vice President of that area before the purchase order can be created.

Step 5: Procurement will create the purchase order and request that all key codes and/or other electronic media is sent to cio@ucmo.edu. Should the department receive the key codes directly, the department will need to forward the information to cio@ucmo.edu. NOTE: If you have not received key codes (if applicable) two weeks after the PO is issued, please contact the TSC with your ticket number to notify that the key codes have not been received.

Step 6: If applicable, after the Office of Technology has received any key codes and/or other electronic information, Office of Technology staff will work with the department to install and deploy the software.

Note 1: Software purchases in excess of \$5,000 (\$3,000 if grant-funded) must follow the university’s procurement solicitation processes. For additional information, please visit <https://www.ucmo.edu/procurement>

Note 2: If the vendor does not accept purchase orders, the department will need to submit their request and all applicable documentation to procurement@ucmo.edu. Procurement will reach out to TSC to initiate a ticket and will work with Legal Affairs regarding the End User License Agreement and seek approval from the Office of Technology. Approval from the Office of Technology will be sent to procurement@ucmo.edu. Once terms and conditions have been agreed upon and approval has been received from the Office of Technology, Procurement will procure software and all documentation will be filed.

If you have any questions regarding the procurement of any good and services, please contact the Office of Procurement at ext. 4001.

Renewal and/or Maintenance Software Purchase

Step 1: Prepare a requisition for new and renewal software purchases through **UCMarket** using the following account and commodity codes:

Shopping Cart for Lisa Butler

Continue Shopping

1 Item(s) for a total of **4,600.00** USD
 subtotal: 4,600.00 USD
 estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or Assign Cart

Have you made changes? Perform an action on (0 items selected)... Select All

Cengage Learning [more info...](#)

Product Description	Unit Price	Quantity	Total
Item added on Dec 15, 2016 Renewal of Math Learning Software for WCM 201 Commodity Code: <input type="text" value="920-45"/> Software Maintenance/Support Taxable <input type="checkbox"/> Capital Expense <input type="checkbox"/>	4,600.00 USD	1	4,600.00 USD

Click Proceed to Checkout

General	Shipping	Billing
Cart Name 2016-12-15 ljbutler 01 <input type="button" value="edit"/> Description no value Priority Normal Prepared by Lisa Butler Prepared for Lisa Butler	Ship To <input type="button" value="edit"/> Attn: Lisa Butler Dept: Procurement Room: 116 Central Receiving 108 West South Street Warrensburg, MO 64093 United States Delivery Options <input type="button" value="edit"/> Expedite <input checked="" type="checkbox"/> Ship Via Best Carrier-Best Way Requested Delivery Date no value	Bill To <input type="button" value="edit"/> Accounts Payable 660-543-4700 Administration Bldg. 316 Warrensburg, MO 64093-5299 United States Credit Card Info <input type="button" value="edit"/> No credit card has been assigned. manage your cards...

Accounting Codes					
Chart	Fund	Organization	Account	Program	Activity
C	100010	501010	733050	6300	no value
Chart C	General Unrestricted Fund	Procurement	Equip Svc Contract - Software Mnt	General Admin & Logistical Services	

For renewal and/or software software, please use the account code of 733050 Once you have reviewed, please proceed to the next step Internal Notes and Attachments.

Step 2: Attach the quote and applicable license agreement to that requisition and submit the requisition for approval.

[Requisition](#) | [PR Approvals](#) | [PO Preview](#) | [Comments](#) | [Attachments](#) | [History](#)

[Summary](#) | [Shipping](#) | [Billing](#) | [Accounting Codes](#) | [Supplier Info](#) | [Taxes/S&H](#)

Internal Notes and Attachments ?

These values apply to all lines unless specified by line item

Internal Note *no note*

Internal Attachments

Add Attachments

edit

Step 3: Review your order and submit your requisition for approval.

Place Order
Assign Cart

✔ **All done!** The required information has been completed and this request is ready to be submitted.
 Once you have reviewed the details, you may continue by clicking the button at the top of the page.

[Requisition](#) | [PR Approvals](#) | [PO Preview](#) | [Comments](#) | [Attachments \(2\)](#) | [History](#)

[Summary](#) | [Shipping](#) | [Billing](#) | [Accounting Codes](#) | [Supplier Info](#) | [Taxes/S&H](#)

Hide header Hide value descriptions

General	Shipping	Billing
Cart Name: 2016-12-15 lbutler 01 edit Description: no value Priority: Normal Prepared by: Lisa Butler Prepared for: Lisa Butler	Ship To edit Attn: Lisa Butler Dept: Procurement Room: 116 Central Receiving 108 West South Street Warrensburg, MO 64093 United States Delivery Options edit Expedite: x Ship Via: Best Carrier-Best Way Requested Delivery Date: no value View/edit by line item...	Bill To edit Accounts Payable 660-543-4700 Administration Bldg. 316 Warrensburg, MO 64093-5299 United States Credit Card Info edit No credit card has been assigned. manage your cards... View/edit by line item...

Accounting Codes ?

Fund	Organization	Account	Program	Activity
				edit

[h:\apps\Routery\FromChart.asp=1481731861620](#)

C Chart C	100010 General Unrestricted Fund	501010 Procurement	733050 Equip Svc Contract - Software Mnt	6300 General Admin & Logistical Services	<i>no value</i>
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Internal Notes and Attachments ?

Internal Note: *no note* [edit](#)

Internal Attachments: *no note*

[Add Attachments](#)

Cengage Learning ... (12k) [Remove](#)

External Notes and Attachments View/edit by line item

External Note: Note to all Suppliers [edit](#)

External Attachments: Attachments for all suppliers *no note*

[Add Attachments](#)

Cengage Learning ... (12k) [Remove](#)

Terms and Conditions

> Clauses [edit clauses](#)

- 100 FACTORY DEFECTS
- 200 REFUSING DELIVERY
- 300 INSPECTION/ACCEPTANCE

[view all clauses - 0](#)

Supplier / Line Item Details

[hide line details](#) For selected line items: [Add to Favorites](#) [Go](#)

Cengage Learning more info...	<table style="width:100%; border-collapse: collapse;"> <tr><td>Contract</td><td><i>no value</i></td><td style="text-align:right;">edit</td></tr> <tr><td>PO Number</td><td>To Be Assigned</td><td></td></tr> <tr><td>Account Code</td><td><i>no value</i></td><td></td></tr> <tr><td>Pricing Code</td><td><i>no value</i></td><td></td></tr> <tr><td>Quote number</td><td><i>no value</i></td><td></td></tr> <tr><td>PO Clauses</td><td><i>no value</i></td><td style="text-align:right;">edit clauses...</td></tr> </table>	Contract	<i>no value</i>	edit	PO Number	To Be Assigned		Account Code	<i>no value</i>		Pricing Code	<i>no value</i>		Quote number	<i>no value</i>		PO Clauses	<i>no value</i>	edit clauses...
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Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price																										
1 Renewal of Math Learning Software for WCM 201 more info...		1/EA	4,600.00	1 EA	4,600.00 USD	<input type="checkbox"/>	edit																								
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Handling					0.00																										
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Handling	0.00
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