Software and Cloud/Web Services Purchase Information Questionnaire

Please answer these questions to the best of your ability. If you do not know the answer to something, just state that and we will help you work through finding those answers.

1. Name of the product:
2. Website for the product’s vendor:
3. Name and email address of a contact for the vendor that provides this product if you have already reached out. Not a reseller contact:
4. If already known, do they resell their product or only sell direct (sole source)?

	1. If they do resell, do you know if they sell through any of our mandatory contract resellers SHI, Insight, or CDWG?
	2. If not any of the above resellers, what resellers do they use?
5. If already known, will this vendor work with UW-Eau Claire and consider working through custom/modified terms and conditions/agreements?
6. Department(s) this is for:
7. Where did you find out about this product?
8. Are you aware of any UWEC departments/people or other UW institutions already using this product?
9. Were any other comparative products considered, and if so, for what reason(s) was this particular product chosen over the other options?
10. Who and/or how many people will be using this product? List usernames if not a large list:

	1. Will students be using this product, and would they be using it for coursework, employment within the University, or outside of that? In detail, describe for what purposes and how they will use this product.
	2. Will there be non-UWEC users? In detail, describe who they would be and how they would use this product.
	3. What is the intended area of use of this product? For coursework? For research? Or is it for non-academic/administrative use?
11. Are you ready to purchase now or are you just investigating a purchase/quote price?
12. Is this a new purchase or a renewal?

	1. If this is a renewal, what are the term start and end dates?
	2. If this is a renewal, do you know the previous Purchase Order number or can you provide a previous order confirmation? Attach any previous order documentation you can when you submit your eForm.
	3. Do you plan to enter a multi-year agreement? If so, how many?
	4. If doing a multi-year agreement, are you wanting to pay for all the years up front in a single fiscal year?
13. Purchase estimated costs, limits, and processes:

	1. What is the estimated annual cost, if known?

		1. Purchases under $5,000 total from a vendor within a single fiscal year can be bought without any formal bid process.
		2. Anything $5,000 and up to $24,999.99 will require going through a simplified bidding or sole source justification process, which purchasing@uwec.edu can assist with and provide you with the necessary forms and information.
		3. $25,000 and above will require contacting purchasing@uwec.edu and ltsconsulting@uwec.edu first.
		4. If other departments also purchase this product, their spend is included in this overall total spend for campus and may impact the process that would be required to be used to purchase.
14. Do you know the funding string(s) that will be used to make this purchase?
15. If already known, what methods does this vendor accept payment? (Note: The amount of purchase will also dictate what is allowed as noted above.)

	1. The maximum purchase amount on a procurement credit card is $4,999.99 but using this method can be processed faster. If this purchase is approved and you would prefer to make the purchase using a departmental procurement credit card, provide the username of the cardholder who will make the actual purchase?
16. This process isn’t always straight forward or quick, and you should be sure to review the information provided on the [Software Purchasing knowledge base page](https://www.uwec.edu/kb/article/purchasing-software/#whyltsconsulting) that helps explain why. When are you expecting to be able to use this software by?
17. Please provide a detailed description of what the product does and how it will be used:
18. Comprehensively describe the types of devices the product will be used on? (Examples: campus-owned Windows and/or Apple computers, Apple iPhones/iPads, Android smartphones, personally owned devices, etc.)
19. Does this product need to be loaded on University owned office computers and made available through [Software Center (Windows) or Self Service (Mac)](https://www.uwec.edu/kb/article/installing-software-on-office-computers/) for self-installation?
20. Does this product need to be loaded on University owned lab computers or teaching stations? Please provide building and room, or computer names:
21. Installation of the product aside, does this product require administrator rights to be used once it is installed?
22. Do you **need** this available in virtual lab? (Note: This isn't always allowed by software vendors. This will require additional time to determine legality.)
23. Does this product need to be loaded onto an on-premises University server to function?
24. Does this product need to use an on-premises University database server?
25. Is this a website hosting product that you will be editing or uploading content into?

	1. Please provide the website address (URL) if it is already known:
	2. Who is the audience for this content?
	3. Have you already consulted IMC and/or LTS about this product?
26. Provide a detailed description of the types of data/information that would be stored/accessed/processed with this product using as many of the categories below that apply. Some data may be classified as medium or high-risk data. Visit the [UW System Information Security: Data Classification website](https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/information-security-data-classification-and-protection/information-security-data-classification/) for more information.

	1. Student education records that would be protected by FERPA, that are not considered directory information. More details are available on [Blugold Central’s website](https://www.uwec.edu/kb/article/blugold-central-student-privacy-records-ferpa/).
	2. HIPAA or health/medical related information (PHI)
	3. Personally Identifiable Information (PII) - Social Security Numbers, Dates of Birth, etc.
	4. Financial information or processing financial/monitory transactions (PCI)
	5. Any other types of data or information processing that does not fit any the categories above
27. Products that store medium or high-risk data will typically require the use of multi-factor authentication (MFA)/2-factor authentication (2FA) as required by UW System Information Security policy. Does this product provide a MFA/2FA option for logins (authentication)? Examples: DUO, text sent to trusted mobile number, email sent to trusted address, etc.
28. List all of the locations the data could end up being stored, which could be on workstations, servers, or in the cloud:
29. The purchase of a product’s license for use can be done in a variety of ways, from individual licenses, to site-wide licenses for campus, concurrent use licenses for a certain number of users, and per computer to name a few. Do you know what type and how many licenses you would like to purchase?
30. Does this product integrate with other systems like Canvas\*, Outlook, Active Directory/LDAP, and are you expecting to use any of these integrations?
31. If the product has a login system (authentication), can it utilize Shibboleth or Azure AD for single sign-on service (SSO)?
32. Some requests to purchase “software” may require the initiation of a Cybersecurity or Information Security Risk Assessment. Please provide the username of your supervisor in the event that eForm needs to be started by LTS Consulting:

If you have any quotes, contracts, agreements, terms and conditions, previous invoice or PO copies, etc. attach those along with your completed questionnaire to your eForm to begin the purchase process.

\*Even though a software or web/cloud service says they can integrate with Canvas, it does not mean it will be approved to do so. All integrations added to Canvas are vetted through a different group in Madison. This process can take several weeks. That team may determine the product does not meet security requirements with how it is developed or reject integration for other reasons. You can see a list of approved, pending, and denied Canvas integrations [here](https://www.wisconsin.edu/dle/external-application-integration-requests/). On this page is a link to a request for that needs to be completed to start an integration request.