

Standard Operating Procedure

SOP Number: F&A-002	Title: INFORMATION TECHNOLOGY PROCUREMENT	Effective Date: 05/01/2025	Page 1 of 3
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REVISION HISTORY		
Date of Revision Approval	Effective Date	Description

Approved by:	
Trevor Garrett, Interim VP Finance & Administration	Date – 04/28/2025

1. Purpose

This SOP establishes a centralized process for all IT-related procurement at KGI to promote cybersecurity and data security, ensure system compatibility, eliminate redundancy, support vendor consolidation, and improve budgeting and support services across academic and administrative units.

2. Scope

This SOP applies to all purchases of information technology-related hardware, software, services, and subscriptions, regardless of funding source (operating, capital, grant, gift, or discretionary funds). This includes, but is not limited to:

- Laptops, desktops, monitors, and mobile devices
- Servers, networking, and storage equipment
- Licensed software, SaaS solutions, and cloud-based platforms
- IT and software-related professional services
- Audio/visual equipment with computing or network capability
- Security tools (endpoint protection, MFA, encryption)

A list of items IT will be responsible for procuring is in Appendix A.



3. Responsibilities

Role	Responsibility
IT Department	Reviews, approves, and manages all IT procurements; ensures compliance with KGI IT standards, cybersecurity policies, and licensing agreements.
Finance Office	Collaborates with IT to process purchase orders and vendor contracts; ensures alignment with KGI procurement and finance policies.
Departmental Requesters	Submit IT procurement requests and funding information; coordinate with IT before contacting vendors or making purchases.
Departmental Managers	Verifies funding availability, provides budget oversight, and ensures grant compliance where applicable.

4. Procedure

Step 1: Submit IT Procurement Request

- All technology purchases must be initiated through KGI IT's support portal (<https://my.kgi.edu>) or e-mail (helpdesk@kgi.edu). Copy your supervisor on all purchase requisitions sent to IT.
- **Requests must include:**
 - Description and purpose of item/service
 - Proposed funding source
 - Purchase justification
 - Timeline or urgency
 - Point of contact

Step 2: Vendor and Quote Coordination

- IT will advise whether the IT department will make the purchase or if the requester will be responsible.
- For purchases made by the IT department, IT will manage vendor communication and quotes.
- For purchases made by the individual departments, the purchaser will coordinate with vendors for quotes.

Step 3: IT Review and Approval

- The IT team will:
 - Validate compatibility, standards, and security compliance
 - Recommend alternatives if more suitable institutional solutions exist
 - Consolidate requests where centralization is advantageous



- Reject requests that pose institutional risk or lack strategic alignment
- **Allow 48 – 72 hours for IT review and approval**

Step 4: Procurement and Fulfillment

- Once IT provides final approval:
 - For items or services not shown in Appendix A, the initiator or requestor can proceed with the purchases. If a purchase order is needed, submit a request to Workday for approval.
 - For purchases made by IT, the department will work with the Finance Office to initiate purchase orders.
 - IT will receive, configure, and distribute purchased technology, as appropriate
 - Devices, software, and licenses will be tracked centrally by IT

Step 5: Inventory and Asset Management

- IT will record and tag all qualifying assets in KGI's inventory system.
- IT will maintain software license usage, renewals, and compliance records.

5. Exceptions

Exceptions must be submitted in writing and approved by the IT Director or the VP of Finance & Administration. Exceptions may be considered for:

- Time-sensitive research equipment (with sponsor-mandated configurations)
- Specialized instructional or lab software (with documented need)
- One-time pilot or testing purchases (subject to risk and compatibility review)

6. Non-Compliance

Procurements made outside of this process may result in:

- Denial of reimbursement and support
- Inability to install, connect, configure, or secure the purchased technology
- Delay or return of non-compliant items
- Escalation to divisional leadership or the Finance Office

8. Questions or Support

Office of Information Technology
Email: helpesk@kgi.edu
Phone: 909 607 2670

APPENDIX A

Items & Services Requiring KGI IT Procurement

CATEGORY	EXAMPLES INCLUDE	WHY KGI IT PROCURES
COMPUTING AND COMMUNICATIONS DEVICES	<ul style="list-style-type: none"> - Laptops, desktops, workstations, servers - Tablets, iPads - Chromebooks - Smartphones - Conference systems and telephones 	Store/process institutional data; require centralized configuration, security controls, support, and standardization; may benefit from negotiated pricing.
IT-MANAGED PERIPHERALS	<ul style="list-style-type: none"> - USB and storage devices (if approved) - Docking stations - Specialty input devices (e.g., pen tablets) - Web cameras - Monitors/displays 	May store/process data or require compatibility with centrally managed devices; require standardization and support; may benefit from negotiated pricing.
SOFTWARE & APPLICATIONS	<ul style="list-style-type: none"> - Software/applications (e.g., Adobe, Word) - SaaS tools (e.g., Calendly, Grammarly) - Web-based platforms - Software subscriptions - Multi-seat licenses and campus-wide agreements - Communications software (e.g., Slack, Hangouts) 	Process/transmit institutional data; require licensing management, security review, and integration; often subject to regulatory compliance (e.g., FERPA, GLBA), may benefit from negotiated pricing.
WEB-BASED SERVICES	<ul style="list-style-type: none"> - Survey tools (e.g., SurveyMonkey, Formstack) - Productivity, business tools (e.g., Word, Adobe) - Media tools (Adobe, Canva) - Cloud storage (e.g., Dropbox, Box) - CRM, SIS, LMS platforms, and integrations - Generative AI Tools (e.g., ChatGPT, Perplexity) - Software/infrastructure as a service (SaaS, IaaS) - Communications platforms (e.g., Slack, Hangouts) 	Process/transmit institutional data; require licensing, access control, security review, and integration; often subject to regulatory compliance (e.g., FERPA, GLBA).
NETWORK INFRASTRUCTURE	<ul style="list-style-type: none"> - Wireless access points - Network switches, firewalls, gateways, routers - Structured cabling - Virtualized network devices - Networking/Infrastructure as a service (IaaS) 	Transmit data, critical to network security and availability.
SERVER EQUIPMENT & HOSTING	<ul style="list-style-type: none"> - Physical/virtual servers - Cloud infrastructure (AWS, Azure, GCP, IaaS) - Network-attached storage (NAS) and backups 	Store institutional data; require centralized management and secure configuration
AUDIO-VISUAL EQUIPMENT	<ul style="list-style-type: none"> - Projectors - Televisions, screens/displays, projector screens - Webcams - Microphones - Speakers, soundbars - Interactive whiteboards 	Provide AV functionality for instruction, collaboration, or events; require standardization, compatibility, and centralized support.
REMOTE ACCESS TOOLS	<ul style="list-style-type: none"> - VPN clients or services - Remote desktop platforms (e.g., TeamViewer) - Cloud VDI or virtual desktop subscriptions 	Transmit institutional data; require centralized access control, secure configuration, and monitoring to support remote access.
SECURITY & COMPLIANCE TOOLS	<ul style="list-style-type: none"> - Antivirus software - Backup and recovery tools - Password managers - Anti-virus/endpoint protection 	Protect institutional data; support regulatory and security compliance (e.g., FERPA, GLBA); require centralized deployment and management.
TECHNOLOGY SERVICES	<ul style="list-style-type: none"> - Data migration services - Third-party audio-visual or IT service providers 	Services that affect institutional systems or data require IT oversight for integration, support, and contractual alignment with institutional security and technical standards.