Technology Asset and Procurement Policy

Version 1.0

Approvals

Policy Approval Date: <mark>TBD</mark>

Final Approval By: Williamson County Commissioner's Court

Policy Effective Date: Oct 1, 2018

Next Review Date: Sept 1, 2019

Version Information

This version supersedes all previous versions and all others should be considered obsolete.

Version History

Version	Approved Date	Effective Date
1.0	<mark>TBD</mark>	10/1/2018

Scope

This policy applies to all Technology Items (see definition below) procured with County funds even if it is not connected to the County network.

Purpose

This policy is designed to help technology asset tracking, procurement and overall management of Technology Items throughout the County. Having an accurate count and inventory is essential for the annual budgeting process as well as software licensing, and staff sizing for support staff.

Definitions

Technology Item
- Computer software & mobile "apps"
- Web-based or "cloud" services
- Cellular (data or voice) service
- Internet or other network connectivity services
- Technology-related hardware including but not limited to:
  - Computers (desktops, laptops, tablets)
  - Mobile Devices as defined in the Mobile Device Policy (e.g. tablets, phones, handheld computers)
  - Servers, networking, and storage
  - Network infrastructure (e.g. switches, firewalls)
  - Display devices (TVs, monitors, projectors, etc.)
  - Printers/scanners/fax machines
  - Audio-Visual equipment

Policy

Budgeting

During the budget process, departments are responsible for identifying if the Technology Items requested are replacement items or are additional/new items (that is, adding to the overall count) when submitting to the Budget Office. For replacement items, departments must enter the serial number or service tag for each item being requested.

After the County budget is approved, the list of replacements as well as new Technology Items will be supplied to Technology Services. This list will be used and tracked as part of the technology ordering process.

Technology Ordering

Ordering Technology Items

All ordering of Technology Items must go through the Technology Services Quote request and ordering process on the Technology Services website. For replacement items, the service tag, serial number, or

other uniquely identifying information (e.g. phone number) for replacements must be entered. For new items, it must be entered as a new item. This will be checked against the approved budget.

Purchase Requisitions must be entered for all above specified items even if below the $5,000 threshold for requisition requirements. Please note that Procurement Card Purchases for Technology Items are not allowed except if pre-approved by the Technology Services Department. Please see Purchasing Policies for further information or contact Purchasing prior to making a purchase.

Overall count of items
The overall count of Technology Items cannot change without approval from the Budget Office.

Non-Budgeted technology expenses
These must be approved by the Budget Office if it adds to the overall count of Technology Items.

Ordering Calendar
Technology Services will publish the final date for ordering various Technology Items towards the end of each fiscal year. This deadline is important as it takes time for suppliers to deliver equipment to the County, and there are scheduling timelines for Technology Services to configure, deliver, and install items. The deadline may vary based on the item and will be published to departments.

Technology Vendor Coordination
Unless excepted for specific orders or projects, all coordination of specifications and ordering of Technology Items will be done by Technology Services.

Delivery & Installation
When items are delivered to departments, the technology item will be updated on the tracking list used by Technology Services and the item that was replaced will be marked off the list. Upon delivery of physical items, the department will be asked to sign an acknowledgement of receipt for the item. This will be kept electronically.

After 30 days, the technology item that is replaced will be blocked from the network and not reconnected without a policy exception (see Exceptions section below).

Asset Tracking
The official County asset tracking for audit purposes is the fixed asset list maintained by the Auditor's Office, and this is not changing with this policy.

As items slated for ordering are tracked by Technology Services, and as Technology Items are ordered, they are tracked against that list. This list can be used for budgeting purposes by departments in future years as well as by Technology Services for budgeting for support (both licensing and personnel).

Asset Transfer and Disposal
When assets are transferred to other departments or sent for disposal or auction, the Technology Services asset list will be updated as needed.

Exceptions

Exceptions must be approved using the IT policy exception process on the IT Service Portal.

Policy Violations

Policy violations may affect budget and/or purchase considerations in current year or following year budgets as well as the ability for Technology Services to support items or connect them to the network.