



# Software Preapproval Process May - June 2026



THE OHIO STATE UNIVERSITY

# Agenda

- Reminder on Software Preapproval Process – What and Why
- Recent Enhancements
- Roles and Responsibilities
- Outreach, Reports, Resources



# What is changing?

Software Preapproval Process (SPP) highly recommended and available enterprise-wide

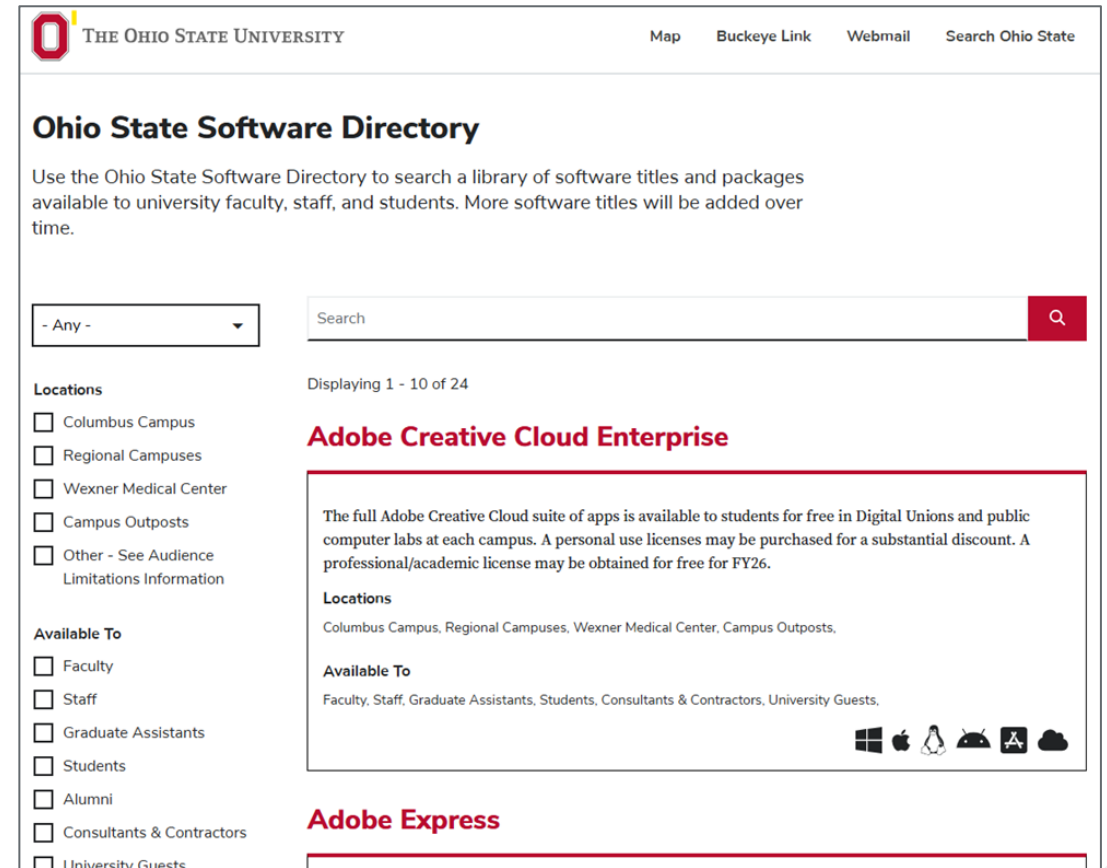
- What is included in the new process?
  - New software purchases or renewals, including free software and titles NOT listed in the Ohio State Software Directory ([softwaredirectory.osu.edu](http://softwaredirectory.osu.edu)), that are procured using a requisition or PCard
- What is not included in the new process?
  - Software purchases that must go through the RFP process DO NOT require software preapproval since review will be part of the RFP evaluation
  - OSU Supplier Contracted items
  - Titles listed in the Ohio State Software Directory matching your audience and use case. Use SP-00000123 to note Software Directory purchases on Requisitions and PCard purchases
  - Dues, memberships, or eBooks for employees



# Ohio State Software Directory

Use the Ohio State Software Directory to find software available to faculty, staff, and students, with new titles added regularly (softwaredirectory.osu.edu)

- The Ohio State Software Directory will include site license software titles along with a grass roots effort to include software purchased by departments
- Benefits:
  - Find software already in use at the university
  - Leverages vetted solutions avoiding duplicate purchases and reviews



The screenshot shows the Ohio State Software Directory website. At the top, there is a navigation bar with the Ohio State University logo, "THE OHIO STATE UNIVERSITY", and links for "Map", "Buckeye Link", "Webmail", and "Search Ohio State". The main heading is "Ohio State Software Directory". Below this, a description states: "Use the Ohio State Software Directory to search a library of software titles and packages available to university faculty, staff, and students. More software titles will be added over time." A search bar is present with a dropdown menu set to "- Any -" and a search button. Below the search bar, it says "Displaying 1 - 10 of 24". The first result is "Adobe Creative Cloud Enterprise". Underneath the title, there is a text box describing the software: "The full Adobe Creative Cloud suite of apps is available to students for free in Digital Unions and public computer labs at each campus. A personal use licenses may be purchased for a substantial discount. A professional/academic license may be obtained for free for FY26." Below this text, there are sections for "Locations" (Columbus Campus, Regional Campuses, Wexner Medical Center, Campus Outposts) and "Available To" (Faculty, Staff, Graduate Assistants, Students, Alumni, Consultants & Contractors, University Guests). At the bottom right of the result box, there are icons for Windows, Apple, Linux, Android, and a cloud icon. Below the first result, the title "Adobe Express" is partially visible.

# Ohio State Benefits

1. Earlier discovery in the purchasing process if a tool doesn't meet requirements
2. Improved compliance with required reviews
3. Standardized management of software requests
4. Improved visibility into requests and approvals company wide
5. No need to create separate ServiceNow requests to Digital Security and Trust
6. Reduced redundancy in software purchases



# What problem are we trying to solve?

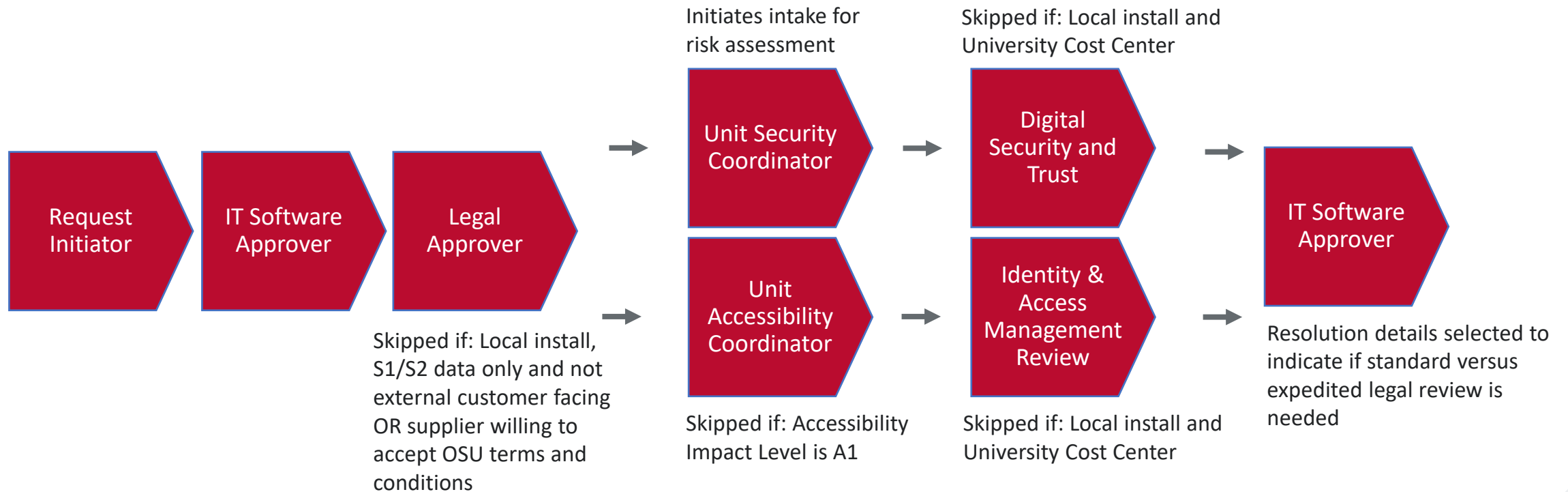
An internal audit found that IT, Accessibility and Risk evaluations of software were inconsistent and, in some cases, skipped. We are formalizing this process in Workday to ensure that evaluations are being done consistently and prior to software being purchased.

## NEW PROCESS



# Software Preapproval Process

- Focus on initial review and documenting full review plans; NOT full review completed
- Any red flags noted



# Recent Enhancements

SPP updates as of May 15:

- Streamlined Vendor Preapproval Form language and instructions (See B&F Procurement Agreements Management page)
- Addition of Accessibility Impact Ratings to align with new Digital Accessibility Procurement Review process
  - A4: Establish Official Institutional Status
  - A3: Student or Public Program Access/Participation
  - A2: Internal Operations
  - A1: Individual Use (If A1, accessibility coordinator step is skipped)
- Addition of a Digital Accessibility Approver-only section
- Addition of recommended file naming convention information for attachments, to improve consistency and support ease of identification



# Software Request Initiator

- Review [Software Directory](#) to confirm no available product meets needs
- Confirm supplier is willing to accept OSU terms (Ohio Law, ADA Addendum) by using [OSU Vendor Preapproval Form](#) and [Email Template](#) and attaching form back to request
- Attach additional documents (i.e. quote, VPAT, HECVAT) from supplier to the request
- Work directly with Unit's IT Director as needed



# IT Software Approver

## Initial step in Software Preapproval Process:

- Confirm no product currently purchased/available that meets the need
- Confirm Purpose/Business justification so downstream reviewer of product use case is understood
- Confirm funding is available
- Confirm OSU Vendor Preapproval Form is attached and supplier is willing to accept OSU terms (Ohio Law, ADA Addendum)
- Confirm number of users needing to access the software is accurate
- If the Accessibility Impact Level is A1, confirm that is accurate, as selecting A1 will bypass the accessibility approver step. If not accurate, correct the rating before you approve.

## Final step of Software Preapproval Process:

- Accepts risks identified by prior reviews and escalates as appropriate
- Final decision on whether the unit can move forward with purchase
- Notes what level of legal review is required during purchasing process

# Legal Approver

- Conditional routing -based on questionnaire responses
- Skipped if:
  - Locally installed
  - NOT external customer facing
  - S1 or S2 data classification
  - OR Supplier will accept OSU's Terms and Conditions
- Reviews requests where the supplier will not accept OSU's Terms and Conditions and provides information on risks of proceeding with purchase back to unit

# Unit Accessibility Approver

- Conditional routing based on questionnaire responses
- Skipped if: Accessibility Impact Level is A1
- Reviews the request for accuracy and completeness; works with the requester to obtain additional information needed to complete the accessibility review
- Completes the Digital Accessibility Procurement Review (DAPR) form (outside of Workday)
  - Validates product use cases
  - Review VPAT/ACR for sufficiency
  - Identifies product barriers
  - Develops an appropriate exception rationale
- Completes the “Accessibility Approver Use Only” section of the SPP request



# Unit Security Approver

- Reviews the request and adds information for OTDI or Med Center Security teams to perform their assessment
- Ensures request is filled in properly (cloud/not cloud, data classification, etc.)



# Central Risk Assessment Approvers

## Identity and Access Management Approver

- Confirms the authentication method is supported and makes Access Management recommendations

## Digital Security and Trust Approver

- Conditional routing based on questionnaire responses
- Skipped if: Accessibility Impact Level is A1
- Consults with Unit Security Coordinator to verify and understand use case and determine assessment roles and needs

# Software Requisition/Expense Approvers

After the SPP is approved, the user will enter the SP-ID when submitting the requisition or expense report. The requisition / expense report will go through the following approvers:

- University Service Center Rep/Lead
  - Determines if agreement/signature is required, level of legal review needed based on IT Software Approver disposition and initiates that process as needed
- Cost Center Category Approver/Health System Category Approver
  - Reviews for IT spend categories to ensure adherence to OSU standards and technical requirements
  - Accountable for ensuring the Software Preapproval Process was completed
- Central Buyer (for Reqs only)
  - Review for compliance if off-contract spend and over \$75k
  - For Med Center, determines if agreement/signature is required

# SPP Outreach

- 5/26/26 – Accessibility Coordinators meeting
- Office Hours
  - 5/19/26 - Finance
  - 5/21/26 - Procurement
  - 6/9/26 - Travel, Pcard, and Expense
  - 6/5/26 - Service Center Managers
  - 6/11/26 - All Service Centers
- 6/9/26 - IT approver role office hour/training
- 6/9/26 - OTDI Relationship Management
- 6/28/26 - Security Coordinators meeting
- 9/7/26 - Committee on Academic Technology



# SPP Reports

- New Report - Approval Times – Software Request Productivity
  - Provides details when each person in the workflow approved the request (identified as “approval moment”) and identifies how many days to complete the request.
- Other Reports
  - Approval Times – Software Request Details
    - Returns results for “completed” requests only
    - Does not have the date that each person in the workflow approved the request
  - Find Software Preapproval Request
    - General report for tracking all SPP requests

# Resources

Change Management help resources are available:

- [Create and Approve Software Preapproval](#) job aid
- B&F [Procurement Agreements Management](#) page
- B&F help email address [BF-softwarequestions@osu.edu](mailto:BF-softwarequestions@osu.edu)

