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Effective Date:	08/17/2015	Replaces:	1.0
Revised By:	Fonda Logston	Review Cycle/Date:	Annual
Reviewed By:	Fonda Logston	Reviewing Unit:	PMO
Title:	Requesting PC Software Installation SOP		
Description:	The process of requesting PC software.		

Requesting PC Software Installation

Standard Operating Procedure

1. General Statement of Purpose

1.1. This document details the procedures for requesting and processing requests for PC software.

2. Scope

2.1. The intended audience for this document is OMES Information Services and their customers.

3. Discipline

3.1. Technical Standards

4. Terms and Definitions

4.1. Enterprise Technical Services – An OMES IS organization responsible for the technical support of IT services provided across the entire OMES infrastructure and network.

4.2. Standard Software – Software that has been approved and will be loaded in the standard image for all OMES IS personal computers.

4.3. Non-Standard Software – Software that is not included in the standard image for OMES IS-supported personal computers.

4.4. Approved Software – Any software that is not standard software, but is approved for use in an agency on a personal computer.

5. Instructions

5.1. **Receiving Software Installation Requests**

5.1.1. All requests for the installation of software on personal computers are initially directed to the OMES Service Desk. Requests received through all other channels, including anyone within OMES IS, are referred to the Service Desk.

5.1.2. Requests for software installation can come to the Service Desk in multiple ways. The preferred manner is the completion of the **Software Installation Request Form**, located on the OMES Service Desk website. This request form will cause an email to be sent to the Service Desk.

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5.1.2.1. The customer can also call, create a CRM Self Service Case, or email the Service Desk. When the Service Desk receives a request from either Self Service or email, the Service Desk technician will call the customer and explain that they will need to complete the online Software Installation Request Form. While on the call, the technician will help the customer locate the form and offer to assist in completing the form. Once the form is completed, the technician will pull the email from the Service Desk inbox and add the information to the case description and/or notes of the case.

5.1.3. Upon receiving the request for software, the Service Desk technician will look at the field in the request form: CRM Case Number. If there is no existing case, the technician will open a case in CRM and log the information.

5.1.4. If the request is an “ADA reasonable accommodation request”, the Service Desk technician will assign the case to themselves. They will then contact the customer informing them that they will need to contact their agency’s Human Resources department for approval, and also that the OMES Service Desk will need an approval email, referencing the case number, sent to servicedesk@omes.ok.gov before the request can be processed. The technician will need to document this conversation in the notes of the case and change the case status to Waiting on Customer. The Service Desk will need to wait for HR’s approval before proceeding with this process.

5.1.5. The Service Desk will assign the CRM Case to the Workstation Support Provider Group.

5.2. Processing Requests for Approved Software

5.2.1. If the software requested has already been approved, the Workstation Support team will verify the number of licenses that are being used to the number of licenses the agency has. If additional license verification is needed, the Workstation Support team will contact the agency.

5.2.2. The Workstation Support team will contact the requestor’s manager for approval, if necessary.

5.3. Processing Requests for Non-Approved Software

5.3.1. If the software requested has not already been approved for agency use, the Workstation Support team will reassign the CRM Case to the Project Management Office for review and processing.

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- 5.3.2. The PMO Provider Group will accept the CRM Case within eight (8) hours of receipt. The PMO Provider Group will facilitate the approval or denial of the request within seven (7) business days of receipt of the CRM Case. They will notify the customer that the requested software is not pre-approved software.
- 5.3.3. The PMO Provider Group will review the information to determine if similar pre-approved software can be utilized.
- 5.3.4. The PMO Provider Group will email the agency's liaison to confirm the proper approval has been granted for the software request. This liaison is designated by the BSD to approve software requests. The PMO will also add the BSD and TAM as interested parties on the case.
- 5.3.4.1. The PMO may refer to the **Agency Software Liaison List** for liaison contact information. This list is located at **J: Drive < Function < PMO < PMO Admin < Case Tracking**.
- 5.3.5. After the PMO has verified the request, and if no other pre-approved product is available, the PMO Provider Group will create four Self-Service CRM Cases for the review of the Software Request and instruct the Service Desk to relate the cases.
- 5.3.5.1. Create one to the Workstation Support Group.
Problem Summary: Review of Non-Standard Software Request
Problem Details:
Service Desk Instructions:
Please assign this case to the Workstation Support Provider Group.
Please add [your name] as an interested party.
Please relate case [case number of request] to this case.
Workstation Support Instructions:
Please review [software name] as a request for approved software.
- 5.3.5.2. Create one to the Server Group.
Problem Summary: Review of Non-Standard Software Request
Problem Details:
Service Desk Instructions:
Please assign this case to the Server Provider Group.
Please add [your name] as an interested party.
Please relate case [case number of request] to this case.
Server Instructions:
Please review [software name] as a request for approved software.

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5.3.5.3. Create one to the Security Group.

Problem Summary: Review of Non-Standard Software Request

Problem Details:

Service Desk Instructions:

Please assign this case to the Security Provider Group.

Please add [your name] as an interested party.

Please relate case [case number of request] to this case.

Security Instructions:

Please review [software name] as a request for approved software.

5.3.5.4. Create one to the Business Segment Director (BSD).

Problem Summary: Review of Non-Standard Software Request

Problem Details:

Service Desk Instructions:

Please assign this case to the appropriate Business Segment Director.

Please add [your name] as an interested party.

Please relate case [case number of request] to this case.

BSD Instructions:

Please review [software name] as a request for approved software.

5.3.6. The OMES IS Security Provider Group will review the software and add external notes with approval or denial of the software. They will perform the following:

5.3.6.1. Review the license agreement to assure it adheres to all state security policies.

5.3.6.2. Check to see if the download contains any malware or viruses.

5.3.6.3. Check to see where the application stores data (local storage vs. cloud storage).

5.3.6.4. Determine if administrator rights are required to run the application.

5.3.6.5. Document the approval conditions.

5.3.7. The Workstation Support Provider Group will review the software and add external notes with approval or denial of the software. They will be looking for the following:

5.3.7.1. Supportability. Is vendor support available for the version being requested?

5.3.7.2. Does it fit into the current architecture?

5.3.7.3. Document the approval conditions.

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- 5.3.8. The Server Support Provider Group will review the software and add external notes with approval or denial of the software. They will be looking for the following:
- 5.3.8.1. Is there a server component piece to the software?
 - 5.3.8.2. Does it fit into the current architecture?
 - 5.3.8.3. Will it require additional hardware? If so, it will need to be requested as a project.
 - 5.3.8.4. Document the approval conditions.
- 5.3.9. The Business Segment Director will review the software and add external notes with approval or denial of the software. They will be looking for the following:
- 5.3.9.1. Does the agency's Applications group need to look at the software request? If so, the BSD will reassign the case to the appropriate staff.
 - 5.3.9.2. Document the approval conditions.
- 5.3.10. If one or more groups decide not to approve the request, the PMO will schedule a meeting with the manager of each of the four parties (Workstation Support, Server, Security, and BSD) to review the request.
- 5.3.11. If the software was approved by the four groups, the PMO will create another CRM Case for the Legal Group and have it related to the other cases. If the software is to be used by OMES, the legal review should be performed by the specific division's legal team. If the software is to be used by another agency, that agency's legal team should perform the legal review. The PMO will inform the customer that they must obtain their legal team's approval of the software's terms and conditions and have that approval emailed to the PMO staff member assigned to the case. The PMO member will then attach the approval to the case.
- Problem Summary: Review of Non-Standard Software Request
- Problem Details:
- Service Desk Instructions:
- Please assign this case to the Executive Services Provider Group.
- Please add [your name] as an interested party.
- Please relate case [case number of request] to this case.
- Legal Instructions:
- Please review [software name] as a request for approved software.
- 5.3.11.1. The Legal Group will review the proposed software contract documents and add external notes with approval or denial of the software contract terms. The review will focus on the following:
- 5.3.11.1.1. Whether the terms and conditions are compliant with state law and the identification of potential issues.
 - 5.3.11.1.2. Document the approval conditions.

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5.3.12. Once all five groups have reviewed and either approved or denied the request, the Project Management Office (PMO) will update the external notes regarding the approval or non-approval of the software with any explanations deemed appropriate.

5.3.12.1. If the software was approved, a CRM Case will be created for the OMES IS Workstation Support Provider Group to load the software. The CRM Case used to approve the software should be related in the new case.

5.3.12.2. If the software was not approved, the PMO will contact the requestor and let them know why the request was not approved. The PMO will then close the CRM Case.

5.4. Adding Software to the Non-Standard Software List

5.4.1. If the software *is* approved, the PC Support team will update the **Non Standard Approved Software** tab of the Non-Standard Software List.

5.4.2. If the software *is not* approved, the PC Support team will update the **Non Approved Software** tab of the Non-Standard Software List, referencing the case number.

5.5. References

5.5.1. Non-Standard Software List - located at the following location:

J: Drive < Function < Customer Service < Standard Software Lists < Non-Standard Software List.xlsx

5.5.2. Software Installation Request Form – www.ok.gov/cio/ under Online Tools/Services

5.5.3. Agency Software Liaison List – **J: Drive < Function < PMO < PMO Admin < Case Tracking**