



UNIVERSITY OF MASSACHUSETTS DARTMOUTH PROCUREMENT MANUAL

Section 7.4 - Information Technology Equipment Requisitioning Procedure

OVERVIEW: This procedure provides instruction for the campus community on how to requisition for Computers (Desktop and Laptops) and IT sensitive equipment including tablets, and/or E-Readers. Here in referred to as equipment.

OBJECTIVE: To acquire related information technology equipment at the lowest price, distribute costs accurately, pay, and effectively track all in the most efficient manner in accordance with University Policy.

PRODUCTS: The following is a list of product types that are subject to this procedure.

RESPONSIBLE STAFF:

Procurement: Confirms compliance with policy and ensures quote for equipment is compliant with campus standards and Policy.

Department: Designated department administrative staff to enter required information into UMass Buyways

Property Control Staff: Tag and complete data entry into Asset Management System.

PROCEDURE:

1. All equipment be it sensitive or not is required to be purchased using the university procurement system. Purchasing equipment with Procards is **prohibited**.
2. Departments are to work with Ben Denton, (x8290 or itprocurement@umassd.edu) in obtaining a quote. He will assist with configuration issues and technical requirements that ensure proper functionality on university systems.
3. Create a requisition in BuyWays. When entering a requisition, input the description as: "Equipment Type - Model - Manufacturer - Quote number".

Equipment types to be used are as follows:

<u>Enter</u>	<u>Products</u>
Laptop	Laptop
Server	Server
Desktop	Desktop
Tablet	Ipad, Galaxy, Archos, ASUS, Iconia E-
Reader	Nook, Kindle and other eReaders PDA
	Personal Digital Assistant
External Drives	External Hard Drive
IT Other	All other IT computer related products not defined.

Example of Manufactures:

Dell
Apple
Lenovo
HP
Acer

Example of Description Field for Equipment Purchases:

EReader - Nook Color
Tablet - Ipad 3G-Apple - Quote #: W112344
Laptop - Macbook Pro-Apple- Quote #: W343457
Desktop – Optima-Dell - Quote #: 100134454542

Account Codes and Commodity Selection:

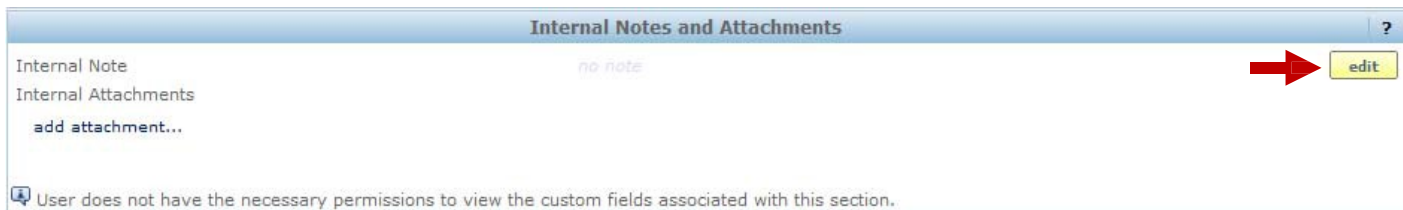
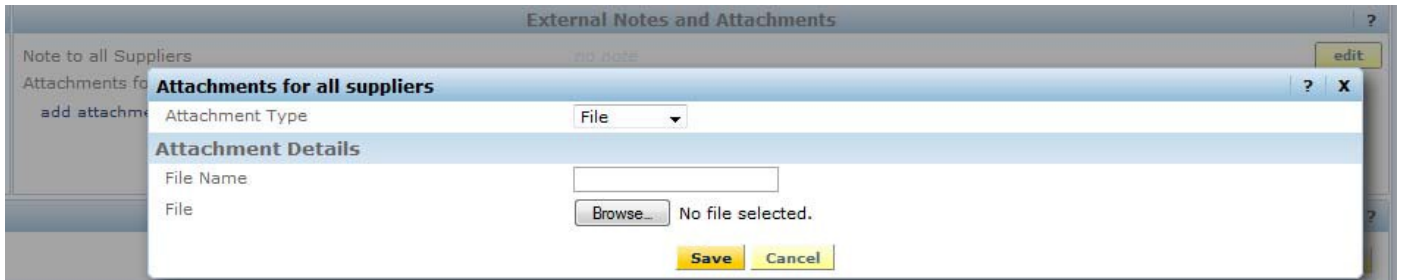
- i. For all laptops, desktops, tablets, or e-readers:
 1. Commodity, select from drop down “Equipment – IT (All)”
 2. Under \$5,000 use account code 741980 Non and Federal Funds 741980.
 3. \$5,000 or Greater use account code 763100 Non Federal and 765100 Federal Funds.
- ii. All peripheral equipment, including keyboards, stylus and mice
 1. Commodity, Select from drop down “Office and Administrative Supplies”
 2. Use account code 734200 Non and Federal funds. iii.
- iii. Maintenance/Protection plans:
 1. Commodity, Select from drop down, “Equipment Maintenance & Repair”
 2. Use account 768100 (IT equipment maintenance and repair - Maintenance of computer hardware, software, systems, peripheral equipment, and word processors.)

4. Custodian of Equipment: The name and building location of the individuals that will be assigned the technology is required to be submitted as internal notes within the “Internal Notes and Attachments” field. The following information is required:

1. Last Name,
2. First Name,
3. email address,
4. Employee ID,
5. Building and Room # equipment will be located

Example: "**John Smith, jsmith@umasd.edu, 12345678, ADMIN 213**".

- a. Requisition Internal Comments – Custodial Information: The comments should be entered on the “Summary” tab entitled ‘Internal Notes and Attachments’. Select the “edit” button and save.



- o Multiple Custodians: If there are multiple individuals and technology being requisitioned on a single PO there are two acceptable ways to enter the requisition. First, a separate line item for each piece of technology with pertinent custodian internal comments can be entered. This is the required method for purchase of 1 to 4 devices. Secondly, one line item can be entered in which the internal comments contain each of the custodial information required.

For five (5) or more custodians, a spreadsheet should be uploaded to the requisition

- o Multiple Departments: When ordering for other departments, please be sure to include the department, building and room number, name of custodian, custodian Employee ID and custodian’s email address in the internal comments of the PeopleSoft Requisition.

- b. Requisition External Comments Attaching Quote: The quote should be attached on the “Summary” tab entitled ‘External Notes and Attachments’. Select the “add attachment...” link and save.




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Section 7.1 - IT Procurement Policy

External Notes and Attachments ?

Note to all Suppliers *no note* edit

Attachments for all suppliers

add attachment... 

5. If the information above is not provided in the BuyWays requisition, the requisition will be returned to the requisitioner for revision.
6. As per the University IT Procurement Policy, it is expected that all faculty, staff and administration have one University owned computer system for teaching and business function.

Any and all exceptions to this policy must be made in writing providing a business, educational or research justification of why an exception is required. The justification must be approved by the Dean, Department Head or Chairperson and Assistant Vice Chancellor of Administrative Services.

All exceptions need full approval before the equipment can be approved and ordered.

IT Procurement Policy:

<http://www.umassd.edu/media/umassdartmouth/administrativeservices/itpolicy62513.pdf>