

Westfield State University

Policy concerning:

Section Administrative

Number 0070

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APPROVED: September 1992

REVIEWED: April 2007

EQUIPMENT/SOFTWARE PURCHASING

PURPOSE

To coordinate the acquisition of software and equipment for the University in an effort to save money, maintain property, and provide the necessary service on purchased items.

DEFINITION

Requisitioner: The person who is requesting that an order be placed; the "ship to attention of" person.

Unit: The administrative office having the authority to service, inventory, install or maintain equipment purchased by the University.

POLICY

1. It is the full responsibility of the requisitioner to obtain approval or sign-off for all items/services listed in this policy prior to the beginning of the purchasing process (electronic or otherwise).
2. When items such as computer equipment/software, audio/visual equipment, communications equipment, security devices, and other specialized equipment are purchased, the purchase requisition shall be reviewed by the department unit (hereby referred to as unit) which is responsible for cataloging, servicing, and/or maintaining the equipment.
3. The unit shall review equipment purchase requisitions through use of the Purchase Review and Approval Form before the requisition receives the **initial** approving signature or electronic sign-off.
4. The unit shall review the requisition to ascertain if the equipment or software being purchased is: (1) a duplicate purchase, (2) the type of equipment that can be supported or serviced by the unit, (3) cost effective, and (4) the best equipment for the desired purpose (in the professional judgment of the unit).
5. Should the unit not recommend the purchase of equipment/software; the equipment can only be purchased with the approval of the appropriate Vice President. In this case, the unit shall not be under any obligation to respond to requests for service, advice, and/or training for this equipment/software.
6. Requisitioners who fail to seek unit review prior to the purchase of software, equipment or items that require university service, installation, or maintenance

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may at the discretion of the unit director be charged for the service, installation, or maintenance for this equipment. The unit shall not be under any obligation to respond to requests for service, advice, and/or training for this equipment/software.

7. The units responsible for reviewing purchase requisitions for software and equipment include:
 - a. Information Technology: Information Technology is responsible for reviewing all purchase requisitions that involve the acquisition of computer-type equipment including, but not limited to, terminals, personal computers, computer software, computer communications devices, printers, and other peripheral devices associated with computer technology.
 - b. Media Services: Media Services is responsible for reviewing all purchase requisitions that involve the acquisition of audio/visual equipment, multi-media equipment, photographic equipment, and materials. Media materials such as video tapes shall be received by the Media Services department for cataloging.

Media Services is also responsible for reviewing all purchase requisitions that involve the acquisition of communications hardware, telephone devices such as FAX machines, telephone answering machines, telephone extensions, or any other devices that would involve a connection to the University telephone system.
 - c. Facilities and Operations: The Facilities and Operations Department is responsible for reviewing all purchase requisitions that involve the acquisition of equipment requiring specialized or additional electrical connections as well as physical modifications to the office space where the equipment is to be located.
 - d. Public Safety: Public Safety is responsible for reviewing all purchase requisitions that involve the acquisition of security systems, alarms, and any other security-type devices.
 - e. The Inventory Control Office receives a copy of all purchase orders to facilitate the inventory of equipment and software purchases as required.
8. The Purchase Review and Approval Form for equipment and software shall be routed to the appropriate unit for review either during the budget process or prior to initiating the purchase requisition. Each unit reviewing Purchase Review and

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Approval Forms under this policy shall provide written guidelines to assist compliance with this policy. The completed form for "Recommended" purchases should be sent to Purchasing, and the requisition number should be at the top.

REVIEW

This policy shall be reviewed annually by the Vice President for Administration and Finance.

**WESTFIELD STATE UNIVERSITY
PURCHASE REVIEW AND APPROVAL FORM**

STEP I.

Requestor: _____ Date: _____

Department: _____ Requisition # _____ RO _____

Requestor's Signature: _____

Please check ***all*** that apply:

- Hardware Software Communications Security Devices
 Media Equipment/AV materials

Please describe the items you wish to purchase and provide a justification for their use. If software is being purchased, please include the hardware configuration on which it will be loaded.

Estimated Cost: _____ Funding Source: _____

Suggested Vendor: _____

STEP II.

The agent/unit reviewing this request must sign off for his/her respective area on the reverse side of this form and forward to the next appropriate agent/unit. If the request is **not recommended**, please return the form to the requestor.

Please see reverse side!

WESTFIELD STATE UNIVERSITY PURCHASE REVIEW AND APPROVAL FORM

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Information Technology

Date received: _____

By whom: _____

Recommend Recommend with no support Recommend Hold Reject

Comments: _____

Signature

Facilities

Date received: _____

By whom: _____

Recommend Recommend with no support Recommend Hold Reject

Comments: _____

Signature

Media Services

Date received: _____

By whom: _____

Recommend Recommend with no support Recommend Hold Reject

Comments: _____

Signature

Public Safety

Date received: _____

By whom: _____

Recommend Recommend with no support Recommend Hold Reject

Comments: _____

Signature

STEP III.

Approval: _____
President/Vice President or designee