

GUIDELINES FOR PURCHASE OF COMPUTER EQUIPMENT, SOFTWARE AND PERIPHERALS

GENERAL Funding

Each year the University Librarian, in consultation with Library Council, designates *centralized funds* for the purchasing of computer equipment, software and peripherals. Purchase decisions using these centralized funds are made through the annual “TEBI” (Technology, Equipment and Building Improvements) purchase process.

However, to provide flexibility in exceptional cases, *an additional IT Department account* funds emergency and other critical needs that arise throughout the year, including new employees’ needs. Additionally, departmental and divisional funds may be used to purchase items, but only as designated below.

UCI Libraries employees are provided with computing tools as needed to perform their work. The norm for employees' computing is a desktop computer; however, there are exceptional circumstances when it may be appropriate to assign a laptop computer instead of, or in addition to, a desktop computer. Such circumstances are expected to remain exceptional because laptops result in higher costs and risks, such as additional costs for desktop peripherals; increase risk of theft or loss due to portability; risk of losing files not backed up on the Libraries' network; increased risk of security breaches of the Libraries' network when laptops are used frequently both on and off that network; ergonomic concerns for frequent laptop users; and increased staff training to utilize the laptop in different network situations. Library employees should consult with their supervisory Department Heads and Assistant/Associate University Librarians in order to determine the appropriate funding source and process for their computer equipment, software and peripherals purchasing needs.

Ownership

All computer equipment purchased from library funds belongs to the UCI Libraries, not to individual departments or employees. (Of course, the lifetime of a specific item may happen to occur in one department.) Equipment replaced by either TEBI or departmental funds must be returned to the IT Department for inventory control and possible redeployment.

IT Department Review and Approval

The IT Department reviews and approves all items requested for purchase from the centralized funds as well as most of the items requested for purchase from departmental and divisional funds, in order to:

- a. ensure compatibility with existing network and hardware configurations;
- b. identify additional related needs and costs;
- c. anticipate the need to schedule installations

Category One

Category One items, all of which require prior review and approval by the IT Department, are normally purchased out of the centralized fund utilizing the TEBI process. However, as an exception in order to meet urgent needs, departmental or divisional funds may be used to purchase these items with the prior approval of the supervisory AUL.

Examples of Category One items:

- Digital cameras over \$500 (including tax and shipping)
- Laptops (see Special Laptop Purchase Guidelines below)
- LCD Projectors
- Memory upgrades
- Printers over \$500 (including tax and shipping)
- Scanners
- Servers
- Software for widespread library use
- Workstations
- all items over \$500 (including tax and shipping)

Category Two

Category Two items, all of which require prior review and approval by the IT Department, may be purchased using departmental or divisional funds but only if the total order costs less than \$500 (including tax and shipping) and has the prior approval of the department head.

Category Two items may also be requested through the TEBI process. It is up to the Department Head or AUL to decide whether to request a Category Two item through the TEBI process or to purchase it using departmental or divisional funds.

If a department plans to use departmental funds to purchase an item which the IT Department is planning to request to purchase in bulk through the TEBI process, the IT Department will inform the Department Head of this plan. The department may then choose to wait for the TEBI process rather than spend departmental funds.

Examples of Category Two (all must cost less than \$500, including tax and shipping)

- Bar code equipment
- CD-ROM burners
- Digital cameras
- Mice
- Personal Digital Assistants (PDAs) and peripherals
- Printers
- Software
- Sound boards
- Speakers
- Zip drives

Category Three

The following items may be purchased using departmental or divisional funds. These items do not require installation by the IT Department and therefore do not require prior review and approval by the IT Department.

Glare screens

Keyboard trays (but keyboard trays require review by the Facilities Department)

Mouse pads

Wrist rests

ORDERING PROCESS

TEBI funds

Orders are prepared by IT Dept. staff. The purchase requests are submitted to the Business Office which places the order. Materials are distributed and installed as necessary by the IT Dept. once received.

IT Dept. Library Wide funds

Orders are prepared by IT Dept. staff. These orders are made by IT Dept. staff either by placing a PALCard order or by submitting a purchase request to the Business Office which then places the order. Materials are distributed and installed as necessary by the IT Dept. once received.

Departmental and Divisional funds

Orders are initiated by the requesting department or division. IT Dept. staff are available to assist – in an advisory capacity - with identifying the specifics of necessary hardware or software and in identifying an appropriate vendor. A workticket is to be submitted to initiate such a consultation.

Orders are prepared by the requesting department or division. If the materials fall into Category Two of these guidelines, information about the order is to be submitted to the IT Dept. as a workticket to be reviewed and approved for compatibility etc. Once approved, these orders are made by the requesting department either by placing a PALCard order or by submitting a purchase request to the Business Office which then places the order. The IT Dept. does not place the order when departmental or divisional funds are to be used. Once the materials have been ordered and received, if assistance from the IT Dept. is necessary e.g. for an installation, a workticket is to be submitted.

Cancelled orders

Cancelled orders are managed by the Business Office – with the assistance of the Department which placed the order where applicable.

SPECIAL LAPTOP PURCHASE GUIDELINES

Laptops are not routinely assigned as individual employee workstations. The need of specific employees for a laptop workstation is determined through consultation between the employee and her/his supervisor and AUL. Among the variety of factors to be considered is the frequency with which an exempt employee is assigned to perform library work outside the library.

Laptops are always treated as Category One purchase requests as defined above. If not received in the IT Dept. they are to be delivered there for inventory and set up.

Ergonomic Risk Mitigation

Laptop requests that are intended to replace a full-time employee's normal desktop computer workstation must minimize ergonomic risk factors in order to prevent repetitive stress injury to the employee. The following features must be present in the workstation and if not, must be included in the same TEBI request as the laptop:

- a separate keyboard on an adjustable tray;
- a mouse on the same level as the keyboard;
- a stand-alone monitor that meets ergonomic specifications for desktop computing;
- a docking station that mitigates constant plugging and unplugging of peripherals and network cables.

Laptop Responsibilities

The IT Department is responsible for insuring the proper software setup and security measures for the laptop, as it does for all UCI Libraries employee workstations. In addition, IT staff will insure that virus scanning software on laptop workstations is updated along with the rest of the Libraries' desktop computing hardware. Employees who use a laptop as the primary desktop computer are responsible for the following:

- following proper University and UCI Libraries procedures when taking the laptop off campus;
- backing up files kept on the laptop and not on the UCI Libraries network;
- connecting the laptop to the network at regular intervals to enable routine software updates and upgrades;
- following anti-virus practices described at <http://systems.lib.uci.edu/docs/antivirus.php>.

Employees who use a laptop at home should also be familiar with the UCI Libraries Guidelines for Support of IT Access from Home [http://systems.lib.uci.edu/policies/Guidelines_for_support_at_home.pdf].

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