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ADMINISTRATIVE CIRCULAR

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TO: **Holders of Administrative Circulars**

SUBJECT: **Guidelines for the Purchase and Lease of Desktop
Information Technology Products**

ORIGINATOR: 

GUIDELINES FOR THE PURCHASE AND LEASE OF DESKTOP INFORMATION TECHNOLOGY PRODUCTS

Purpose

These guidelines set out procedures to be followed by Library staff in the purchase and lease of all IT desktop hardware and software. The aim of these guidelines is to ensure:

- that all IT desktop purchasing conforms to standards;
- that desktop products can be supported; and
- that desktop purchasing is coordinated to deliver the most cost effective outcome for the Library.

Background

The introduction of each IT desktop item into the Library's computing environment can have an impact on the support arrangements in a number of ways. Each desktop item requires support for installation, integration with other services, ongoing problem resolution, assistance with upgrades, LAN cabling, asset management, licensing, maintenance payments, coordination of repairs and financial monitoring to ensure that the Library is getting value for money. Given its responsibility to provide these support services, the IT Division must be involved in the purchasing process at all stages, from concept to installation.

These guidelines apply only to desktop products, but similar principles apply to the purchasing of non-desktop technology products. In these cases, advice should be sought from the Director, IT Business Systems.

Summary of Stages

The following stages are involved in the purchasing process:

1. User area identifies the need for the IT desktop item or service
2. User area (or its Divisional Support Unit) obtains advice from the Director, Desktop and Client Services
3. User area (or its DSU) prepares a written description of the requirement, including an explanation of why the item is needed
4. The Desktop and Client Services Branch assesses the suitability of the proposed purchase
5. The IT Division (DSU) obtains quotes, which are checked by the branch of the IT Division responsible for desktop and client services
6. User area (or its DSU) prepares the Purchase Order
7. The IT Division (DSU) ensures that the Purchase Order is completed and approved
8. The IT Division (DSU) orders the item and handles delivery and installation.

Description of requirement

The written description should contain sufficient information to enable the Information Technology Divisional Support Unit to specify the right item when obtaining quotes. It should also explain why the item is needed and who it is being purchased for, to enable the branch of the IT Division responsible for desktop and client services to assess its suitability.

Assessing the suitability of a purchase

This step is required to ensure that the most cost effective solution is implemented. Issues to be considered in the assessment will include:

- integration with other services;
- Library standards and policies;
- support requirements; and
- value for money.

A key consideration with respect to requests for additional PCs and PC upgrades is whether any existing stocks of this equipment can be redeployed.

Quotes and the placement of orders

The IT Divisional Support Unit will maintain a register of preferred suppliers and will act as a single point of contact for obtaining quotes and following up delivery once an order has been placed.

Funding Purchases

Each year, generally in October or November, bids are sought from divisions for IT (hardware and software) expenditure proposals for the following financial year. These bids should include anticipated expenditure on desktop IT products. These bids will be considered by the Corporate IT Group, and recommendations will be made to Corporate Management Group. Where the item is to be purchased, the funds corresponding to the approved bids will be allocated to the budget of the requesting division. Where the item is to be leased, the funds corresponding to the approved bids will be allocated to the budget of the IT Division, and a schedule of the approved bids will be provided to all Divisional Support Units.

In addition the IT Division will be given a small contingency fund to meet those requests from divisions for leased equipment which arise after the completion of the above approval process. Division heads will be expected to ensure that only essential items are requested against this contingency fund. (If the contingency fund becomes exhausted, the IT Division would refer the state of this fund to Corporate Management Group for discussion).

Details of leasing costs for PCs and related equipment can be obtained from the IT Divisional Support Unit.