Acquisition of Computer Equipment, Services, or Software

NOTE: The website URL for Workday reference guides that are referenced in this section is: https://confluence.esg.wsu.edu/display/WKB/Workday

POLICY

Each department is responsible for complying with the computer purchasing requirements and procedures outlined in this policy.

WSU Information Technology Services (ITS) reviews certain information technology related purchases of equipment, software, and cloud services in coordination with WSU Purchasing Services for system compatibility, network connectivity and data security purposes. Additional forms or information may be required in order to proceed with such purchases.

Purchase Cost Under $10,000 Without Contract or Agreement

For computer equipment, services, or software purchases under $10,000 that do not require a signed contract or an agreement, departments may select suppliers with or without approved purchasing contracts and without undergoing a bidding process. The $10,000 limit does not include tax and shipping.

Departments may contact Purchasing Services for a current list of available contract suppliers or for other assistance. See also Approved Purchasing Contracts.

Purchase Documentation

For purchases totaling $10,000 or less that do not require a signed contract or an agreement, departments may do one of the following:

- Submit a Requisition in Workday for which the departmental buyer then sends a Purchase Order directly to the supplier. (See the Workday Create Requisition reference guide.)

- Process a procurement card transaction directly with the supplier (BPPM 70.08).

- Submit a departmental Purchase Order in Workday. (See the Workday Create and Change Purchase Order reference guide.)

Purchase Cost Under $10,000 and Requiring Contract or Agreement

For computer equipment, services, or software purchases under $10,000 that require a signed contract or an agreement, departments are to complete an Information Services (IS) Review Questionnaire. The questionnaire is available from the Purchasing Services Computers website at: purchasing.wsu.edu/computers-and-software/
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**Purchase Cost Under $10,000 and Requiring Contract or Agreement (cont.)**

The department's area technology officer (ATO) or senior ITS staff member performs the following steps:

1. Completes and signs the IS review questionnaire.

2. Attaches the questionnaire and any applicable supporting documentation to process the purchase with the supplier to a Contract Request in Workday. (See BPPM 70.10 and the Workday Contract Request reference guide.)

The packet is automatically routed to Purchasing Services when the Contract Request is submitted.

**Purchase Cost Over $10,000 or Requiring Contract or Agreement**

The following requirements apply to purchases of computer equipment, services, or software costing in excess of $10,000 or requiring a signed contract or an agreement.

**Contract Requisition**

Departments submit a Contract Requisition in Workday to Purchasing Services to process purchases in excess of $10,000 requiring a signed contract or an agreement. (See BPPM 70.10 and the Workday Contract Request reference guide.)

If a purchase over $10,000 is expected to result in a Purchase Order and does not require a signed agreement (i.e., computing equipment) create a Requisition in Workday and choose the appropriate spend category for the IT goods and services. Workday routes the purchase to the IT Security Review Team prior to it reaching Purchasing Services. (See the Workday Create Requisition reference guide for instructions.)

Include the following information with the Contract Request:

- Name, address, contact telephone, and contact e-mail address for selected supplier.

- Written quote from supplier for requested purchase items.

- A detailed explanation of why supplier was selected as the "sole source" or best choice for the department, if and when appropriate.

Refer to the sole source guidelines available from the Purchasing Services General Information website at:

purchasing.wsu.edu/general-information-about-purchasing/
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ITS Review Questionnaire

Departments are to complete an Information Services (IS) Review Questionnaire to process purchases in excess of $10,000 or requiring a signed contract or an agreement. The questionnaire is available from the Purchasing Services Computers website at:

hpurchasing.wsu.edu/computers-and-software/

The department's area technology officer (ATO) or senior ITS staff member performs the following steps:

1. Completes and signs the IS review questionnaire.

2. Attaches the questionnaire to a Contract Request in Workday (see above for required information and supporting documentation).

The packet is automatically routed to Purchasing Services when the Contract Request is submitted.

Purchase Cost From

$10,000 - $100,000

State law requires that WSU conduct a quote process for selection of equipment, services, or software purchases costing $10,000 to $100,000. Purchasing Services coordinates the quote process for University departments (BPPM 70.13). NOTE: See Contract Suppliers for exception to this requirement.

Purchasing uses the information from the Contract Request or Requisition to verify with the supplier that the prices quoted are the best ones available to WSU.

Purchase Cost Over

$100,000

State law requires that WSU perform a formal competitive process for computer equipment, services, or software purchases that exceed $100,000. Purchasing Services coordinates the sealed bidding process for University departments (BPPM 70.13). NOTE: See Contract Suppliers for exception to this requirement.

Purchasing Services performs a sealed bid for a requested purchase costing in excess of $100,000 if the supplier does not have an approved purchasing contract with WSU or if the supplier is not the sole source for the equipment, services, or software.

Contract Suppliers

Purchases over $10,000 that are prepared under approved purchasing contracts do not undergo the bidding process. Purchasing Services processes approved purchasing contract requests in accordance with normal processing turnaround times.
Acquisition of Computer Equipment, Services, or Software

Contract Suppliers (cont.) For a current list of approved contract suppliers or for other assistance, contact Purchasing Services or see the Purchasing Services Computers website at:

purchasing.wsu.edu/computers-and-software/

APPROVED PURCHASING CONTRACTS Purchasing Services provides information regarding current state and University contracts and preferred provider agreements for purchasing computer equipment, services, or software, at:

purchasing.wsu.edu/computers-and-software/

INTELLECTUAL PROPERTY See BPPM 35.30 regarding the University's intellectual property requirements for the purchase and use of software.

RECORDS RETENTION REQUIREMENTS Departments must maintain records of computer software licenses, registrations, and proof of purchase until disposition of the software, in accordance with University records retention requirements. (See the records series titled Software Inventory and Registration File, in the All-University Records Retention Schedule--Information Services Records table in BPPM 90.01.)

NOTE: When the department retains an original of an expenditure document (e.g., purchasing card receipt) or contract agreement as proof of purchase for software, the department is responsible for ensuring that the document is retained for either the stated cutoff and retention period for the records series (e.g., fiscal year plus six years; end of contract/agreement plus six years), OR until disposition of the software, whichever is longer.