Purchasing Equipment & Technology

Toni Mehrman, ITS Finance Specialist, Information Technology Services
Policies

**University Policy Number 2113** - Payment of Telework or Remote-Work Expenses

**University Policy Number 1301** - Responsible Use of Computing

Procedures

**ITS Security Standards** – establishes access and security regulations to protect the privacy, security, and confidentiality of university systems

**Computer Purchase Guide** - Instructions for purchasing computers and laptops
ITS Computer Standards

Why are Standards important for GMU?

• To ensure that all machines connecting to the Mason network meet ITS security requirements
• ITS identifies and tests hardware and software on business class machines
• New models/equipment are routinely tested and vetted by ITS staff and plans are made for any equipment that has been announced to be reaching end-of-life (EOL) status
ITS Computer Standards

- Equipment that has been tested and approved for purchase is posted on the “ITS Approved Computer Hardware Standards for Faculty & Staff” webpage.
- Departments may purchase equipment from the following without needing ITS Approval:

What’s Next?

After reviewing the ITS Standard Page for equipment you may contact an approved vendor to request a quote.

- **Dell**, Contract UVA845196
- **CDWG**, Contract: UVA-AGR-IT-00425-CDWG
- **Apple**, Contract VA-150605-APPL
- **Patriot Tech**, Contract GMU-1115-14

ITS recommends purchasing from the approved vendors listed above because the end points come with GMU Images, technical support will be provided, and the end points have been tested on GMU’s network.

How Can We Help?

Departments in need of one-on-one support may fill out a Desktop Consultation form found on the ITS Computer Standards at https://its.gmu.edu/knowledge-base/its-approved-computer-hardware-standards-for-faculty-and-staff/

Examples of ITS Support:

- Assistance with quote creation
- Adding additional upgrades to standard machines (upgrading RAM, hard drive space, etc.)
- Questions on current standards
- Assistance with determining the type of equipment needs for the department
Please note that completing a Desktop Consultation form for a machine outside of the approved standards does not necessarily mean your departmental will be approved for the requested machine. Instead, the form is for a consultation to interface on available options.

For additional help please contact ITS Support Center at support@gmu.edu
Maintaining Equipment Inventory

Christian Mullins,
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• What are my responsibilities after purchasing?

• Do I need to request an inventory tag?

• What about old equipment I am replacing?
Inventory Life Cycle

- **Acquisition**: All assets costing $5,000+ and/or purchased with ETF funds must be barcoded.
- **Changes to Equipment During Use**: Complete correct form to assign, transfer or loan equipment.
- **Surplus, Cannibalize, Loss**: Update central inventory as equipment is no retired and/or is lost/stolen.
- **Annual Inventory**: Provide a complete accounting of equipment on a yearly basis.

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Today’s Focus

- Acquisition
- Changes to Equipment During Use
- Surplus, Cannibalize, Loss
- Annual Inventory

Do I need to request a tag?

What about old equipment I am replacing?
What Type of Equipment is Tagged & Inventoried?

<table>
<thead>
<tr>
<th>Type of Equipment</th>
<th>Abbreviation</th>
<th>Dollar Threshold</th>
<th>Included in Annual Inventory?</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>GEN</td>
<td>$5,000</td>
<td>Yes</td>
</tr>
<tr>
<td>Equipment</td>
<td>ETF</td>
<td>-</td>
<td>Yes</td>
</tr>
<tr>
<td>Trust Fund (ETF)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not Fixed Asset</td>
<td>NFA</td>
<td>Non ETF &amp; under $5,000</td>
<td>No</td>
</tr>
</tbody>
</table>

*For more information on ETF funds, please see our Equipment Inventory Training series on MasonLEAPS*
What Type Equipment is Tagged & Inventoried?

Equipment Liaisons are responsible for reporting new fixed asset purchases to the Fixed Assets office within 30 days of receipt

• **Fixed Assets**: equipment purchased with ETF funds or ≥ $5,000 per unit (including add-ons)

  • **Capitalizable add-ons examples**: essential equipment accessories, install/shipping costs.

  • **Non-capitalizable add-ons examples**: warranties, maintenance, support, training
A Few Examples

Purchase a server (ETF funded) costing $4,500 with an additional $200 paid for installation.

- Request a tag! While this order falls under $5k (including install), it was purchased with ETF funds and thus must be tracked regardless of cost.

Purchase a desktop (GEN funded) costing $4,500 with an additional $600 paid for shipping

- Request a tag! While the desktop itself is <$5k, there is a capitalizable add-on cost (shipping) that brings the total item cost over $5k.
Unused Equipment

It is often the case that as new equipment is purchased, older equipment begins to be phased out and no longer used.

• Equipment not used by the department is at an increased risk of loss.

• This can lead to equipment not being found during inventory, leaving the department at risk of budgetary penalties.

• One control in place to avoid such scenarios is the Surplus Property program.
The Surplus Process

The department submits a Surplus Workflow ticket.

Go to: https://fiscal.gmu.edu/equipment/dispose-equipment/

Facilities coordinates a pickup with the department and sends Fixed Assets a confirmation once completed.

Fixed Assets removes any barcoded equipment from the department’s inventory.
Why use Surplus?

- Higher risk of being lost. Avoid potential budgetary penalties!
- Reduces the amount of equipment you are required to track down come inventory time (“Why do I have to account for an unused VCR from 1999?!”) 
- Facilities picks up technological equipment, AND office equipment, furniture, etc. University space is in high demand!
Want to learn more?

Some additional inventory resources:

• **Equipment Inventory Training series** on MasonLEAPS
  • More detailed discussion of tagging, capitalization policies, ETF funds

• **Surplus Request Video Guide** on Equipment Inventory home page

• assets@gmu.edu
  • Please feel free to reach out with any questions you may have! I am happy to help!
Recordings and information on future Boot Camps will be posted at https://fiscal.gmu.edu/boot-camp/