

## Standard Operating Procedure (SOP): Handling User or Department Technology Purchase Requests

### 1. Purpose:

The purpose of this SOP is to establish a standardized process for handling user or department technology purchase requests. This ensures a streamlined and efficient approach to fulfill technology needs while maintaining budgetary control and adhering to organizational procurement policies.

### 2. Scope:

This SOP applies to all personnel involved in managing and processing technology purchase requests within the organization.

### 3. Responsibilities:

- Requestors (Users/Departments): Responsible for submitting accurate and detailed technology purchase requests.
- IT Procurement Team: Responsible for managing the technology purchase request process, coordinating with vendors, and ensuring compliance with procurement policies.
- Budgetary Approver: Reviews and approves purchase requests based on budgetary constraints and organizational guidelines.
- IT Support Team: Assists in evaluating technology requirements and providing technical expertise during the purchase process.

### 4. Prerequisites:

- Understanding of the organization's technology requirements and procurement policies.
- Knowledge of approved vendors and budgetary constraints.

### 5. Procedures:

#### 5.1. Submitting Purchase Requests:

- Requestors complete a technology purchase request form, providing detailed information such as the required technology, specifications, quantity, and any specific vendor preferences.
- If necessary, requestors can consult with the IT Support Team for guidance on suitable technology options.

#### 5.2. Review and Evaluation:

- The IT Procurement Team reviews the purchase request for accuracy, completeness, and compliance with procurement policies.
- If any clarifications or additional information is needed, the IT Procurement Team communicates with the requestor for further details.

#### 5.3. Vendor Selection:

- The IT Procurement Team identifies suitable vendors based on the requested technology, budgetary constraints, and organizational preferences.
- Requestors may provide vendor recommendations if they have specific preferences or pre-approved vendors exist.

#### 5.4. Quotation and Cost Analysis:

- The IT Procurement Team obtains quotations from selected vendors based on the provided specifications.
- Perform a cost analysis of the quotations, taking into account factors such as pricing, warranty, support, and delivery timelines.

#### 5.5. Budgetary Approval:

- The budgetary approver reviews the cost analysis and approves or rejects the purchase request based on available budget and organizational guidelines.
- If rejected, the IT Procurement Team communicates the decision to the requestor along with any necessary explanations or alternative options.

#### 5.6. Purchase Order:

- Once the purchase request is approved, the IT Procurement Team generates a purchase order (PO) and sends it to the selected vendor.
- The PO includes the details of the requested technology, quantities, pricing, delivery expectations, and any other relevant terms.

#### 5.7. Order Tracking and Delivery:

- The IT Procurement Team monitors the status of the purchase order, ensuring timely delivery.
- Communicate the estimated delivery date to the requestor and provide updates if there are any delays or changes to the order.

#### 5.8. Receiving and Deployment:

- Upon receipt of the ordered technology, the IT Procurement Team verifies the received items against the PO and performs necessary quality checks.
- Coordinate with the IT Support Team to facilitate deployment, installation, or configuration of the technology, if required.

#### 6. References:

- Organization's procurement policies and guidelines.
- Approved vendor lists and technology standards.

#### 7. Definitions:

- Technology Purchase Request: A formal request submitted by users or departments to acquire new technology or replace existing technology.

#### 8. Revision History:

- Version 1.0: [17MAY2023] - [David Siebert]
  - Initial draft of the SOP.
- Version 1.1: [Date] - [Contributor Name]
  - Incorporated feedback from stakeholders.
  - Added section on order tracking and deployment.