Equipment Procurement Process

Overview

This document outlines the standard procedure for requesting, approving, purchasing, and receiving equipment at Quantum Dynamics. The process ensures cost-effective procurement while maintaining appropriate controls and compliance with company policies.

Scope

This process applies to all equipment purchases including: - Computer hardware (laptops, desktops, servers) - Mobile devices (phones, tablets) - Office equipment (printers, scanners, etc.) - Peripherals and accessories - Software licenses (physical and digital) - Furniture and fixtures - Lab and specialized technical equipment

Roles and Responsibilities

Role	Responsibilities
Requestor	Initiates equipment request with proper justification
Manager	Reviews and approves requests from direct reports
Department Head	Approves requests exceeding $1,000
Procurement Team	Sources equipment, negotiates terms, places orders
IT Department	Approves and configures technology equipment
Facilities	Manages furniture and physical workspace equipment
Finance	Provides budget approval and payment processing
Receiving	Processes incoming shipments and inventory

Standard Equipment Allocations

Quantum Dynamics provides standard equipment based on role requirements:

Technology Allocation by Role

Role Category	Standard Equipment Package
Engineering	High-performance laptop (16GB RAM, 512GB SSD), dual monitors, docking station, noise-canceling headset
Sales/Marketing	Ultralight laptop (8GB RAM, 256GB SSD), smartphone, convertible stand, wireless headset
Executive	Premium ultrabook, tablet, smartphone, wireless accessories
Operations/Finance	Standard laptop (8GB RAM, 256GB SSD), single monitor, wired headset

Role Category	Standard Equipment Package
Customer Support	Standard desktop, dual monitors, premium headset with microphone

Refresh Cycles

- Laptops/Desktops: 3 years
- Monitors: 5 years
- Mobile devices: 2 years
- Accessories: As needed based on wear

Procurement Process Flow

1. Request Submission

1. Employee identifies equipment need
2. Employee accesses Equipment Request form in the Procurement Portal
3. Employee completes form with:
    - Item description and specifications
    - Business justification
    - Desired timeline
    - Cost estimate (if known)
    - Cost center/budget code
4. For technology requests, employee selects from pre-approved catalog when possible
5. Form routes to employee's manager

2. Approval Workflow

Approvals are required based on request type and value:

Standard Equipment Requests

- Manager approval required for all requests
- IT approval required for all technology equipment
- Facilities approval required for furniture/fixtures

Financial Approval Thresholds

- $0-$500: Manager approval only
- $501-$1,000: Manager + Department Lead
- $1,001-$5,000: Manager + Department Lead + Director
- $5,001+: Manager + Department Lead + Director + VP/C-level

3. Procurement Execution

Once approved: 1. Request routes to Procurement team 2. Procurement validates specifications and identifies appropriate vendor 3. Procurement reviews contract terms or uses established purchasing agreements 4. Purchase order generated in Oracle Financial System 5. Order placed with vendor 6. Confirmation and estimated delivery date communicated to requestor

4. Receiving and Deployment

1. Equipment received by Receiving department
2. Item inspected for damage and accuracy
3. Asset tagged and entered into inventory system (for items >$500)
4. For technology equipment:
    - IT department configures hardware/software
    - Security protocols implemented
    - Asset registered in device management system
5. Requestor notified when equipment is ready
6. Equipment picked up or delivered to requestor
7. Requestor signs equipment receipt acknowledgment

Emergency Procurement Process

For urgent business needs where the standard process timeline would cause significant business impact:

1. Requestor completes Emergency Procurement Request form
2. Requestor obtains email approval from Department VP
3. Procurement expedites vendor selection and ordering
4. Expedited shipping requested if available
5. Standard approval documentation completed retroactively

Equipment Returns and Exchanges

If equipment is defective or does not meet requirements:

1. Notify Procurement within 5 business days of receipt
2. Complete Equipment Return Request form
3. Return item to Receiving department with original packaging
4. Procurement coordinates return/exchange with vendor
5. Replacement follows expedited process

Budget Considerations

- Equipment requests must align with department quarterly budget
- Unbudgeted purchases over $2,500 require CFO approval
- Purchase requests in Q4 receive additional scrutiny

- Equipment should be requested in accordance with the annual planning cycle when possible

Key Performance Indicators

The procurement process is evaluated based on:

- Request-to-delivery cycle time (target: 10 business days)
- Percentage of catalog vs. custom purchases (target: 85% catalog)
- Cost savings vs. benchmark pricing (target: 12% below retail)
- First-time fulfillment quality (target: 98% correct)
- Budget adherence (target: within 5% of forecast)

Related Documents

- Technology Standards Catalog
- Vendor Management Policy
- Asset Management Procedure
- Procurement Authority Matrix

Support and Contacts

- Procurement Team: procurement@quantumdynamics.com
- IT Equipment Support: itequipment@quantumdynamics.com
- Facilities Requests: facilities@quantumdynamics.com
- Equipment Helpline: x7890