USDA\ARS Tifton Location Electronics Products Acquisition and Procurement Directive

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I. Purpose

The objectives of this directive are: (a) to establish written procedures to promote and comply with the environmental objectives set forth by the President in Executive Order 13423, "Strengthening Federal Environmental, Energy, and Transportation Management" and the environmental objectives of the USDA-ARS, and (b) to provide clear guidance to personnel at the USDA-ARS Tifton Location on the acquisition and procurement of electronic products for the various units at the location.

II. Requirements of Executive Order 13423

Executive Order 13423, issued January 2007, requires that Federal Agencies shall:

> "ensure that the agency (i) when acquiring an electronic product to meet its requirements, meets at least 95 percent of those requirements with an Electronic Product Environmental Assessment Tool (EPEAT)-registered electronic product, unless there is no EPEAT standard for such product, (ii) enables the Energy Star feature on agency computers and monitors, (iii) establishes and implements policies to extend the useful life of agency electronic equipment, and (iv) uses environmentally sound practices with respect to disposition of agency electronic equipment that has reached the end of its useful life."

This directive deals with meeting requirement (i) when acquiring electronic products at the USDA-ARS Tifton Location.

III. Definition

For the purpose of this directive, "electronic products" will consist of desktop computers, laptop computers, monitors, and integrated computer systems. This definition is used due to the fact that these are the products that are currently registered under the Electronic Product Environmental Assessment Tool (EPEAT).

Appendix B of this directive addresses the purchase of electronic products other than desktop computers, laptop computers, monitors, and integrated computer systems. These products include printers, copiers, facsimile machines, multifunction devices, televisions and handheld or mobile electronics. Currently, these products do not have EPEAT standards.

IV. Responsibilities
   A. <u>Requesting Personnel</u>: It is the responsibility of the personnel requesting the electronic product to ensure that the desired electronic product is an EPEAT-registered product or that the product has no EPEAT standard.
   B. <u>Computer Center Personnel</u>: Computer Center personnel will maintain a list of government-contracted computer products that are EPEAT-registered.
   C. <u>Purchasing Agent</u>: The location purchasing agent will make every effort to ensure compliance with Executive Order 13423 by purchasing EPEAT-registered products. The purchasing agent will also help in the collection of data on the purchasing of electronic products.
   D. <u>EMS Coordinator</u>: The EMS Coordinator will collect, organize and report data on electronic purchases annually. Data on the number of EPEAT-registered products purchased will help to ensure compliance with Executive Order 13423 and measure the effectiveness of location efforts to promote environmentally-friendly practices.

IV. Procedure

<u>The Purchase of desktop computers, laptop computers, monitors, and integrated computing systems.</u>

Step 1. Personnel planning the purchase of an electronic product should determine the purpose of the electronic product. This includes the tasks that the product will help accomplish.

Step 2. The requesting personnel will contact the Computer Center with a request for a product recommendation.

Step 3. The Computer Center staff will make a recommendation for an appropriate electronic product for the desired application. The recommendation will be based upon the following considerations:

- Compliance with ARS Office of the Chief Information Officer IT Hardware and Software Policy
- Adherence to USDA Departmental Regulation 3170-001, "End User Workstation Standards."
- Product registration in the Electronic Product Environmental Assessment Tool. Preference will be given to products that are rated Silver and Gold.

Step 4. The requesting personnel will use the recommendation to make the purchase of the electronic product. It should be noted in the description areas in CATS (CRIS Allocation Tracking System) and U.S. Bank Access Online that this is an electronic product. The following two actions should be taken in CATS to ensure accurate purchase data collection:

- It should be documented in short description section on the General page of CATS, the EPEAT rating of the electronic product (for example, JDOE-DELL-DESKTOP COMPUTER-EPEAT-Gold).

- In addition, the purchaser will designate that the electronic product is an EPEAT-registered product by placing the acronym EPEAT behind the vendor name in User Field 4 on the User Fields page of a CATS AD700 entry (for example, DELL-EPEAT).

In the cases where EPEAT rated electronics are not available, the purchaser will determine whether Eco-labeled products are available that meet the requirements of the assigned mission. The documentation of the purchase of an electronic product that has no EPEAT standard is similar to the documentation of an EPEAT-registered product.

- It should be documented in the short description section on the General page of CATS that the purchase is an electronic product (for example, JDOE - Staples - fax - electronic product).

- In addition, the purchaser needs to designate that the purchase is an electronic product and whether or not the product has an eco-label. This is done by placing the words ELECTRONIC PRODUCT and either ECO-LABEL or NO ECO-LABEL behind the vendor name in User Field 4 on the User Fields page of a CATS AD700 entry (for example, STAPLES-ELECTRONIC PRODUCT- ECO-LABELED or STAPLES-ELECTRONIC PRODUCT- NO ECO-LABEL).

Appendix A of this document gives detailed, illustrated guidance on CATS data entry for the purchase of computer electronic products.

Appendix B of this document gives detailed guidance on the determination of whether Eco-labeled products are available.

The Collection and Reporting of Electronic Products Purchasing Data

Step 1. Annually, the Location Purchasing agent will provide the EMS Coordinator with the number and type of electronic products purchased.

Step 2. Annually, the EMS Coordinator will compile the data and report the findings along with any recommendations for program improvement to the Location Coordinator and EMS Committee.

V. References

Executive Order 13423, "Strengthening Federal Environmental, Energy, and Transportation Management," dated January 24, 2007.

USDA Secretary's Memorandum <u>5500-002</u>, "Implementing Executive Order 13423 Strengthening Federal Environmental, Energy, and Transportation Management," dated September 17, 2007.

ARS Office of the Chief Information Officer Bulletin 07-003, "IT Hardware and Software Policy," dated September 27, 2007.

UDSA Departmental Regulation 3170-001, "End User Workstation Standards," dated December 12, 2007.

Appendix A

INSTRUCTIONS FOR COMPUTER PROCUREMENT DATA ENTRY IN CATS (CRIS ALLOCATION TRACKING SYSTEM)

<u>Data Entry Procedures:</u>

Data entry for the purchase of computer electronic products in the CATS system follows the same procedures that are outlined in the "New and Improved CRIS Allocation Tracking System" handout that is issued by the Location Administrative Office during Purchase Card training. However, there are modifications to two steps in the new purchase request procedure to allow for the tracking of computer electronic products. The modified steps involve the entry of the short description on the General page and User Field #4 of the User Fields page. These steps are modified and highlighted in bold script in Item 1 "MODIFIED CATS INSTRUCTIONS" of this Appendix. These instructions should be used when entering a new purchase request for computer electronic equipment into CATS. Procedures for reconciling a purchase are the same as with any other type of purchase.

<u>Figures 1 &2</u>

Figure 1 and Figure 2 of this Appendix illustrate how a proper computer electronic product data entry will look in CATS. Figure 1 illustrates how the short description should appear. Figure 2 illustrates how User Field 4 should appear on the General and User Fields pages of a CATS entry.

ITEM 1: MODIFIED CATS INSTRUCTIONS

CATS INSTRUCTIONS FOR CARDHOLDERS
(AS USERS)
Enter your name and password and Log in to the CATS system.
From the Main Menu select:
ACTION
AD700
Click ADD – at the bottom of the screen

GENERAL TAB:
CLICK ON "?" TO SELECT ACCOUNT CODE
CLICK ON "?" TO SELECT SUB ACCOUNT

*** SHORT DESCRIPTION:
ENTER FIRST INITIAL, LAST NAME, VENDOR,
DESCRIPTION, the word EPEAT, & EPEAT LEVEL (gold,
silver, or bronze) (i.e.   JDOE - DELL-LAPTOP-EPEAT-GOLD)

If sending to Procurement Office, enter necessary information
Enter your name/lab information in "Requesting Office" box
Enter Title of Approving Official

DETAIL TAB:
ENTER DESCRIPTIONS BY LINE ITEM, QUANTITY, PRICE PER EACH
UNIT
(SELECT CORRECT BUDGET OBJECT CLASS CODE)
ENTER ANY ESTIMATED FREIGHT CHARGES
ENSURE YOUR NAME AND PHONE NUMBER ARE CORRECT
(Notice requisition number at the top of the AD 700 has bee established.)

ACCOUNT DETAIL TAB:
SELECT VENDOR
(You may type in the vendor name or you can select the "?" under
"Recommended Sources (Vendors)" to search for vendor names.)
To use the search option you can use a % before and after whatever you are searching for.
(Ex. – If you would like to pull up Fisher Scientific, you would enter %fis% and click on
the find button. This will bring up everything that has "fis" in the vendor name.

NOTES TAB:
Use this tab to enter nay information regarding the status of your order. For
example, if you have received a partial order of if there is a backorder.
This is always where you can save and print your AD 700.

*PROCUREMENT***: -** NOT APPLICABLE TO BASIC USERS

USER FIELDS TAB: You can either type in the user field blocks or click on the"?" to
bring up the search engine.
REQUIRED USER FIELDS:
1 = CARDHOLDER NAME (TMaze)
2 = Initials of SY/Supervisor (DDP)
3 = Building # if purchase is related to R&M/O&M

FIELD #4:   VENDOR NAME-EPEAT (i.e. DELL-EPEAT)

RECORD INFO TAB:

Shows who entered the AD 700 and when it was entered. It also shows who last modified the AD 700 and when it was modified

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Figure 1. Sample entry for short description

Figure 2. Sample entry for User Field 4 of User Fields page

Appendix B

Policy and Procedures for the Acquisition and Procurement of Electronic Products With No Electronic Product Environmental Assessment Tool (EPEAT) Standard

Purpose:
The objectives of this appendix are: (a) to establish written procedures to promote and comply with the environmental objectives set forth by the President in Executive Order 13423, "Strengthening Federal Environmental, Energy, and Transportation Management" and the environmental objectives of the USDA-ARS, and (b) to provide clear guidance to personnel at the USDA-ARS Tifton Location on the acquisition and procurement of electronic products that do not currently have an Electronic Product Environmental Assessment Tool (EPEAT) standard.

Scope:
This appendix addresses the purchase of electronic products other than desktop computers, laptop computers, monitors, and integrated computer systems. These products include printers, copiers, facsimile machines, multifunction devices, televisions and handheld or mobile electronics.

Policy Statement:
When purchasing or acquiring electronic products as defined by this appendix, it will be the basic policy of the USDA-ARS Tifton Location to consider environmental attributes along with traditional price and performance criteria in the acquisition and procurement of those electronic products.

Responsibilities:
 A. <u>Purchaser:</u> It is the responsibility of the purchaser to ensure that the electronic product purchased complies with the requirements set forth in this document.
 B. <u>Purchasing Agent:</u> The location purchasing agent will make every effort to ensure compliance with Executive Order 13423 by incorporating environmental considerations into the decision-making process for the purchase and acquisition of electronic products as defined by this appendix.
 C. <u>EMS Coordinator:</u> The EMS coordinator shall provide assistance and guidance to electronic product purchasers in complying with the requirements of this document.

Definitions:

ECO-LABELING - "An "eco-label" identifies a product that meets specified performance criteria or standards. In contrast to "green" symbols or claim statements made by manufacturers and service providers, an eco-label is awarded by a third-party organization for products or services that are determined to meet specific environmental criteria."[1]

Some of the more common eco-labels used on U.S. products that can be used to satisfy the requirements of this document are:

U.S. Environmental Protection Agency, Comprehensive Procurement Guidelines
http://www.epa.gov/cpg/
The U.S. EPA's Comprehensive Procurement Guideline (CPG) program promotes the use of materials recovered from solid waste by designating products that are or can be made with recovered materials and by recommending practices (minimum recycled content) for buying these products.

U.S. Environmental Protection Agency, ENERGY STAR®
http://www.energystar.gov/
ENERGY STAR is a voluntary partnership between the U.S. Department of Energy, the U.S. EPA, product manufacturers, local utilities, and retailers, promoting energy efficient products by labeling with the ENERGY STAR logo and educating consumers about the benefits of energy efficiency.

U.S. Department of Energy, Federal Energy Management Program
http://www1.eere.energy.gov/femp/
The Federal Energy Management Program (FEMP) provides services to U.S. federal agencies to assist them in reducing the cost of government through energy efficiency, water conservation, and the use of solar and other renewable energy. FEMP designates energy efficient products not covered by ENERGY STAR.

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[1] **Source:** *Understanding Eco-labels* http://www.federalelectronicschallenge.net/resources/docs/ecolabel.pdf

Procedure:

Step 1. Determine the environmental acceptability of the electronic product being considered for purchase. To meet the requirements of E.O. 13423, the Tifton location will purchase, to the greatest extent practicable, only electronic products that have received an "eco-label." However, lack of an eco-label will not prevent the purchase of needed electronic products for the accomplishment of assigned missions.

Step 2: Purchase the Electronic Product. Once it has been determined that the electronic product has an eco-label or that there is no acceptable product with an eco-label available, the purchaser can purchase the product in accordance with established procurement procedures.

Step 3: Document that the purchase is an electronic product in the CRIS allocation Tracking System (CATS). The documentation of the purchase of an electronic product that has no EPEAT standard is similar to the documentation of an EPEAT-registered product.

- It should be documented in the short description section on the General page of CATS that the purchase is an electronic product (for example, JDOE - Staples - fax - electronic product).

- In addition, the purchaser needs to designate that the purchase is an electronic product and whether or not the product has an eco-label. This is done by placing the words ELECTRONIC PRODUCT and either ECO-LABELED or NO ECO-LABEL behind the vendor name in User Field 4 on the User Field page of a CATS AD700 entry (for example, STAPLES-ELECTRONIC PRODUCT- ECO-LABEL or STAPLES-ELECTRONIC PRODUCT- NO ECO-LABEL).

References:

Understanding Eco-labels
http://www.federalelectronicschallenge.net/resources/docs/ecolabel.pdf