COMPUTER REPLACEMENT PROGRAM
GUIDELINES AND PROCEDURES

Information Technology Services (ITS) is implementing guidelines for replacing desktop and laptop computers on a three (3) year cycle as allowed by funding and as dictated by the University’s lease agreement.

The overall purpose of the program is to ensure that computing resources on campus are up-to-date. The goals of the Computer Replacement Program (CRP) are to:

- Ensure that all tenured and tenure-track faculty and benefits-based staff members who use computing resources in their positions have access to a computer of sufficient capability to support basic computing needs* in fulfillment of their work responsibilities;
- Ensure that appropriate computing resources are available in departmental computing facilities and university offices in support of USD’s mission;
- Ensure that desktop computer systems have sufficient capacity and compatibility to meet each department and school’s operational needs;
- Establish a centralized budget which provides basic computing resources for university employees, thereby providing relief to area budgets and reducing reliance on year-end surplus and current fund contingency;
- Implement minimum standards for computing resources on campus increasing the supportability of the institution's installed base of equipment;
- Maintain ongoing compatibility of computer systems with the computer applications used within each department and school at USD;
- Streamline the specification, acquisition, and deployment of new equipment and re-deployment or disposal of old equipment.

* “Basic Computing Needs” include word processing, electronic messaging, Library access, Internet (web) access, spreadsheet, simple database, and basic institutional data access. Other specialized needs, such as secondary computers, advanced hardware, or Research needs, and other specialized needs must be funded from departmental budgets or from research funds.

These guidelines shall apply to the replacement cycle for all desktop and laptop computers at USD. Information Technology Services has authority and is responsible for the acquisition and support of computer replacements.

A. QUALIFIED PARTICIPANTS

Provided they require computing resources in their position and that their current computer is at minimum three years old, the following individuals are eligible to participate in the CRP:

1. Permanent, benefits-based administrator or staff employee
2. Tenured or tenure-track faculty member

The CRP will fund only one computer (desktop or laptop) per faculty or staff member. When a laptop computer is provided from the replacement budget, it will not normally include peripheral devices (external keyboard, monitor, mouse, docking station, extra batteries, etc.).

B. ACQUISITION & SUPPORT

All computers purchased by any department or school at the University of San Diego (USD), are property of USD, unless otherwise stipulated by specific written contract through external funding agencies. ITS provides computer technology support for departments and schools throughout USD that meet ITS’s software and hardware standards. All computers meeting the standards will be supported by the appropriate personnel in the department of Desktop Support Services/Information Technology Services.

During each budget planning cycle, ITS will assess desktops in each department and recommend replacement needs. Once the computers that will be replaced have been identified, ITS will notify School/Department Representatives and/or the affected faculty/staff that equipment has been targeted for replacement. Notification will be given approximately one-two months prior to the scheduled replacement month. A list of the currently available standard configurations will be available at http://www.sandiego.edu/its/orders/specs.php.

Acquisition and support procedures:

ITS will:

• Define a standard computer and determine the technical features required on USD desktop and laptop computers to meet the specific business needs of USD.

• Recommend and approve purchases for the standard computer according to applicable rules as established by USD’s Policy and Procedure manual, Purchasing and Financial Policies, No. 2.10.2 Purchasing.

• Select appropriate computer equipment and provide assistance and network resources so that the computers assigned to USD offices have sufficient capacity to meet the needs of assigned job responsibilities.

• Maintain an accurate inventory of all University computers in order to track computer assets and identify computer equipment slated for replacement in a way that supports resource planning and gives priority in future replacement cycles to those computers not upgraded or replaced on the normal 3-year cycle due to funding limitations.
• Schedule, coordinate and execute the replacement process while complying with applicable rules and regulations for the acquisition and redeployment of the equipment involved in replacement activities.

  o Computing resources placed through the CRP are installed by the Technology Support Services department on a priority basis. Every effort will be made to provide a flexible installation schedule that causes minimal workflow interruption.

• Communicate and arrange the logistics needed to complete the replacement processes. This includes, but is not limited to:

  o Providing notification to School/Department Representatives, in a timely manner, the need for replacements and informing them of the known aspects of applications that may be affected by those changes.

  o Working with each department’s contact personnel to facilitate the replacement process while maintaining continuity of critical business functions.

  o Working with appropriate department personnel to test equipment and make necessary adjustments to applications as required by the replacement process.

  o Arranging for or providing training or instructions as necessary to assist users in transitioning to the new equipment.

  o Developing as-needed permanent or temporary “workarounds”, consistent with meeting technological and security needs to ensure continuity of business essential “legacy software” that is not compatible with incoming computer/policies and cannot be replaced with compatible software consistent with replacement schedules. (Such workarounds are to be documented in writing by Information Technology and the business unit(s) involved to include the business needs, technologies involved, plan for permanent resolution and contingency plan in case the workaround is invalidated due to future technological or business needs.)

School or Division Representatives and Budget Approvers:

Each Division/School/Department must designate a Representative/Budget Approver for their group. The Representative must:

• Verify the computer inventory to be replaced each year, including submission of any corrections or additions to ITS. If something is overlooked, it can either be replaced during the next purchase cycle, or the department can submit a "new use" purchase request.
• Choose a replacement for each of the computers to be replaced that year or work with their group’s faculty/staff to select a replacement configuration. Replacement equipment will be selected from the lists of standard equipment provided by ITS. It is not required that a Macintosh be replaced with a Macintosh or a PC with a PC. Once the Division/School/Department Representative has submitted their request for replacement computers, ITS will place the orders and schedule installations.

• Approve the financial impact of the replacement selections made by the faculty/staff, as well as any exceptions to standards or new use purchases.

• Share responsibility to contain costs related to the central Computer Replacement Project account.
  o Division/School/Department budget authorizers and others who approve computer purchases should carefully consider the functional needs of the user, and exercise prudent judgment when selecting computer models.
  o Except for those with specialized needs, we should minimize the purchase of more expensive laptops and larger flat-panel displays. Most users' needs are met by ITS’ standard computer configurations.

Configuration Selection:

Faculty and staff are strongly encouraged to discuss the standard configurations with their area Desktop Support Technician prior to submitting a request form so that the equipment requested will most effectively meet their business needs and work requirements. No changes or modifications can be made to a request after the equipment has been approved and ordered. The employee's department will be responsible for purchase of any external hardware items for the system if additional capabilities become necessary after the fact.

Platform Selection:

Technology Support Services fully supports both Macintosh and PC standard configurations. The choice between Macintosh and PC should be motivated strictly by the applications that are required in the job function.

C. REPLACEMENT AND REDEPLOYMENT

Equipment purchased or replaced by the replacement budget is the property of the institution, not of the department or individual. Departments must surrender a like computer for each computer installed under CRP. This includes any special monitors, keyboards, add-on cards, etc. that were purchased as a part of the original CRP purchase. Departments may not repurpose existing departmental computers within the department to expand the number of computers supported. If the department wishes to keep the old equipment for other uses, a request must be made in writing. Recycled equipment will not be considered as part of the 3-year replacement cycle.
All computers slated for replacement will be assessed by Information Technology Services to determine the feasibility of redeploying units. If units are deemed appropriate for redeployment, Information Technology Services will:

- Identify units in Information Technology Services’ redeployment inventory list;
- Clean and re-image computers;
- Load appropriate anti-virus software on computer;
- Assign to next faculty or staff on the “In-line for Used/Refurbished Computers” list;
- Deliver and install computer to requesting faculty or staff – joining to USD’s network;
- Transfer the asset in Computer Inventory list;

If units are deemed inappropriate for redeployment, Information Technology will:

- Clean computer and return to lease company, or
- Clean computer and breakdown (take apart) in order to identify working parts
- Recycle parts to refurbish/repair computer other units

D. PURCHASE AND REPLACEMENT OF GRANT-FUNDED EQUIPMENT

Individuals and departments pursuing grants for computing equipment or grants that include computing equipment should consult with the Information Technology Services prior to the purchase for configuration approval. Since many grant-funded projects are temporary in nature, grant funded equipment is not automatically placed on the replacement cycle. Computing equipment that is purchased with grant funds will become part of the computer inventory of the University and will be installed, networked and repaired by Desktop Support Services staff.

**Funding for replacement of grant-funded equipment is subject to agreement between the purchasing department and Dean’s Office, the Provost Office, and Information Technology Services.**

Faculty members with funds from research awards or startup funds may use these funds to purchase computers and equipment exceeding the norm of one per employee for office or lab use. The equipment belongs to the University and is not placed on the replacement cycle. Faculty members are expected to consult with the Director of Desktop Support Services or their area technician prior to purchasing computer equipment with research or startup funds.

Computer purchases funded through grants, external programs or other budget resources will be inventoried and will adhere to USD and ITS policies unless otherwise stated in the granting agencies contract.
E. **PURCHASE AND REPLACEMENT OF COMPUTER LAB OR SPECIAL PURPOSE EQUIPMENT**

Purchase of new computer lab equipment, research stations, or other special purpose computer stations must be approved by the Dean’s Office, the Provost Office, and Information Technology Services.

**Funding for replacement of departmental computer lab, research, or other special purpose equipment is subject to agreement between the purchasing department and the Dean’s Office, the Provost Office, and Information Technology Services.**

F. **EXCEPTIONS**

In the event standard equipment does not meet a specific computer resource requirement, such as in the requirement for a specific hardware platform, the department may request an exception to the standard. Requested upgrades to the standard configuration will not be processed without approval from their area representative. Departments/Schools must fund every exception/upgrade. Exceptions are granted on an as-needed basis at the discretion of the department or school representative.

Exceptions to this computer replacement policy, including compelling business needs, should meet the following criteria and will be evaluated as follows:

- **Technical Justification** – Evaluated based on documented manufacturer’s technical requirements for hardware, software and peripherals.
- **Cost or Resource Justification** – Evaluated based on verifiable cost or resource savings.
- **Legal or other mandate** – Evaluated based on technical, cost or other factors identified by the request initiator with approval as needed.
- **Machine Mal-Function** – Machines that malfunction due to user-created errors or mistreatment will be dealt with on an as-needed basis. In such cases, the Tech Support Center will work with the business units and their administration to resolve issues involved and, when appropriate, will assign temporary desktop computers as needed and based on the availability of suitable machines.

G. **Responsibility for Equipment**

Each employee is responsible for taking reasonable precautions in regard to USD owned computer equipment. Employees or their departments will be held responsible for damage to such equipment arising out of their negligence or misconduct. Equipment should remain in the location where originally installed unless other arrangements are made with ITS. Individuals or departments experiencing loss or damage to University owned computers should contact the ITS Tech Support Center.