I. POLICY STATEMENT
A. All USF-owned computers purchased through USF’s Computer Refresh Program will be replaced periodically by ITS with newer computers to minimize service cost and improve productivity. After the new computer is operational, the old computer is retired in accordance with the USF Computer Retirement Policy.

II. REASON FOR POLICY
A. The purpose of this policy to create an authorized process for replacement of computers purchased through USF’s Computer Refresh Program (CR) that complies with applicable laws, regulations, and software licensing while minimizing life-cycle costs of the computers.

III. SCOPE
A. This policy covers all USF-owned computers that were purchased through USF’s Computer Refresh Program.

IV. AUDIENCE
A. This policy is intended for all USF faculty and staff who use USF-owned computers that will be periodically replaced in accordance with this policy.

V. POLICY TEXT
A. Introduction
1. The ITS computer refresh program replaces desktops every four years and laptops every three years. This replacement cycle provides our community with competitive technology, stronger security standards and enhanced support from the ITS Help Desk.
2. All University Faculty and Staff members who have a USF computer scheduled for replacement are contacted by ITS or their division or college's CR Coordinator prior to February of the replacement year to start the replacement process. All members must first validate their possession of eligible computers and confirm what type of standard replacement will meet their needs. ITS ensures that the hardware and operating systems for standard desktops and laptops will fulfill the majority of everyday computing needs.
3. In 2014, ITS improved the client experience by improving the standards of desktops and laptops and added a premier standard line to the catalog. The computer images were slimmed down for optimal performance and Dell was selected as the new vendor for PC desktops. This resulted in every faculty and staff member's individual computer being more than sufficient for all their computing needs, decreased computer deployment time, and a reduced number of special exception requests. ITS also covers failure of batteries and power adapters for the duration of CR computer life span.

B. **Hardware Standards**

1. All University computers purchased must meet the university's [hardware standards](#) at the time they are procured.
2. Standards are set by the University Information Technology Committee (UITC).
3. Any non-standard computer must go through the Exception Process for approval.
   a. If university hardware standards do not meet a client's needs, exception equipment may be purchased, subject to the approval of the unit technical liaison, budget approver and the Director of Client Support Services.
   
   **NOTE:** The ITS Help Desk is optimized to support standard computers with [standard software](#) images. Selecting non-standard equipment may limit support and delay repairs.
4. Computer replacements requested prior to scheduled replacement must be submitted as an exception request.
5. Previously approved exception computers will have to go through the exception process for each replacement to validate that the new standard computers with additional processing capability, memory, and improved graphics do not address the original cause for the exception.
6. Exception requests that result in procuring cost that exceeds the regular standard replacement will incur budget sharing with the local department. For approved exception requests, the local department will be asked to share the difference between a standard unit and the exception unit requested.
   a. ITS recommends submitting the exception request early to allow maximum processing time.
7. Faculty who believe that a standard device will place essential research or teaching work at risk may apply for an exception to run old and new systems in parallel for up to one month. Exception requests must be submitted to the Director of Client Support Services (nmwright@usfca.edu) and include a rationale that addresses the following questions:
   a. What research or teaching activity will be placed at risk by the computer replacement?
   b. What applications or services must be tested for compatibility with the new computer?
   c. What aspects of the new computer (hardware specifications, operating system, etc.) are cause for particular concern?

C. Software Standards
1. All University computers are loaded with a standard software suite, including a single operating system and software for core office functions. Site licenses are negotiated for software on this list. Any secondary operating systems and additional software outside of UITC-approved standard software will have to be paid for by the requester's department.
2. Upgrades and/or additions to the standard software suite are scheduled and carried out university-wide by ITS. Clients will be notified prior to any scheduled maintenance of the standard software suite.
3. Clients are responsible for ensuring that additional software they install is compatible with the standard suite. Contact ITS prior to purchasing non-standard software to review your current software requirements and hardware capacity.

D. Coordinators, Technical Liaisons and Budget Approvers
1. Each Division/School/College must have a designated replacement coordinator, technical liaison, and budget approver. Divisions, Schools and Colleges may choose to have a local technical liaison approved by the VPIT, or to have this service provided by ITS. Coordinators, budget approvers and technical liaisons must also be approved by the Division/School/College VP or Dean.
2. Coordinator responsibilities include:
   • Assist in scheduling of installations and other logistics (such as access to locked offices, or designating/acting as a proxy if the recipient of the new computer cannot be present).
3. Technical Liaison responsibilities include:
   • Membership on the Desktop Computing subcommittee of the UITC
   • Participation in selection of computer replacement standards.
• Assisting clients with matching their needs to available computers in inventory, or appropriate standard models and configurations for new purchases.
• Reviewing and advising the Budget Approver regarding new use, failure and theft replacements and requests for exceptions to standards.

4. Budget Approver responsibilities include:
• Exercising judgment in assessing and approving computer purchases including:
  • Review and approval of new use, failure and theft replacement requests in consultation with the Technical Liaison.
  • Review and approval of exceptions to standards in consultation with the Technical Liaison.
  • Review and approve sharing cost to exception requests and working with ITS Finance for budget transferring details.

5. Current Replacement Coordinators, Technical Liaisons and Budget Approvers

E. Multiple Computers

1. USF full-time faculty and staff will be issued the following CR equipment (1 laptop or 1 desktop and 1 monitor). Multiple computers should only be purchased for a single faculty or staff member in cases where:
   a. Separate computers are required for research or testing purposes (i.e., research labs, system testing on multiple platforms)
   b. Second (or any additional) computers will have to go through the UITC exception request process.

2. Faculty and staff who wish to purchase or replace a secondary or other number of multiple computers or monitors must follow the UITC Exception Process.

F. New Use

1. New use refers to computers purchased for any reason other than replacement of an existing unit during the annual cycle, and which are not funded through a University Spending Request (as defined by the Budget & Planning office). Due to the limitations of the replacement budget, new use requests should not exceed 10 computers or $10,000. New use requests may be fulfilled through redeployment of used equipment in inventory. New use requests for more than 10 computers or $10,000 require the approval of the full UITC.

2. New use computer purchase requests must be submitted via the UITC Exception Process.
3. New hires will be provided a standard computer desktop or laptop. Any additional requirements cost that exceeds the regular standard computer or desktop will incur budget sharing with the new hire’s department.

G. **Theft and Failure Replacement**

1. Theft - contact Public Safety (x4222) to file an incident report, obtain report number and then contact the Help Desk. Incident report number must be provided to Risk Analyst in the Accounting and Business Services department for insurance assessment. Departments are responsible for the first $350 of the replacement cost as the deductible and case handling fee while the University risk management account pays the rest.

2. Failure and Loss – In the event of failure, asset owners must have the Help Desk certify that the equipment has failed and is no longer under warranty. Upon determination of failure, the Help Desk will initiate the process of replacing the failed equipment with equipment capable of providing comparable functionality. Any additional or different functional requirements must be communicated to the Help Desk at the time the failure replacement process is initiated.
   a. In the event of failure due to an external event (dropped equipment, liquid spills, etc.), departments are responsible for the first $350 of the replacement cost as the deductible and case handling fee, while the rest comes out of the University risk management account where applicable.
   b. In the event of equipment loss, departments are responsible for the replacement cost of the computer.

H. **Equipment Security**

1. ITS is required to lock down all desktop computers for security purposes. Cable locks will be provided for all university laptops and desktops. If computers need to be moved, please schedule an “Office Move” request with ITS Help Desk in advance. ITS will be able to move the computer equipment as well as phones and make sure everything is set up properly. It is the responsibility of each owner to secure his/her computer while on campus. Employees who wish to use university desktop computers at home must have a supervisor request to ITS for approval. If approved, ITS will update and indicate the approved location in our record. For more information, please refer to ITS Cable Lock Policy at [https://usf.service-now.com/kb_view.do?sysparm_article=KB11055](https://usf.service-now.com/kb_view.do?sysparm_article=KB11055).

I. **Displays, Peripherals and Supplemental Equipment**

1. Displays purchased separately from CPUs will require funding from local department.
2. Displays are not part of the regular replacement cycle. Displays will be replaced upon failure or through exception requests.
3. The Replacement Project will offer one centrally funded standard external keyboard and mouse for desktops.

J. **Grant and other Special Account Purchases**

1. Examples of grants and other special account purchases include ASUSF, the Jesuit Community, St. Ignatius Church, and the Fromm Institute.
2. Computer equipment purchased with grant funds needs to also conform to CR policy. This includes and is not limited to asset tagging to be identified as university assets.
3. Grant funded assets will not be replaced by the regular CR project. Special and grant account purchasers may choose to replace or retire computers at the end of the replacement cycle.
4. To replace computers, please follow the "New Use & Exception Request" instructions. Computer and monitor equipment will be charged to the appropriate special account and or the appropriate grant.
5. Special account purchasers or owner of grant funded computers may also select to retire the equipment at the end of the replacement cycle. ITS welcomes donations of to-be-retired computers for re-purpose or for the UITC donation program pool. Equipment that is not in condition to be donated will be disposed of in an environmentally friendly manner.
6. All retired computers are required to be returned to ITS for data wipe for security purposes and to comply with the University's software license agreements. If special account purchases select to keep the retired equipment, ITS will wipe the computers and return the computers to the appropriate owner.
7. The cost of the USF Standard Software Suite for computers purchased under special/grant accounts will be covered by CR account-funded site licenses/volume purchases.
8. Reasonable repairs will be covered by the ITS parts/repair budget. If the cost of repair is 50% or more of the computer's fair market value, it will not be repaired and the department will have the option of retiring it or replacing it through the grant/special account.

VI. **PROCEDURES**

A. All University Faculty and Staff members who have a USF computer scheduled for replacement are contacted by their division or college's CR Coordinator by February of the replacement year, which provides Faculty and Staff 6 months to schedule an appointment for replacement.
B. The Faculty or Staff member contacts ITS to schedule the refresh (i.e., they will receive a newer replacement computer).
C. On the same day that a replacement computer is installed, the retired computer is collected by ITS.
D. During the first 10 days, the user can contact ITS to recover any missing data from their old computer.

VII. RELATED INFORMATION
A. (None)

VIII. DEFINITIONS
A. Computer Refresh
   1. University of San Francisco's annual technology program that refreshes University-owned computers that have reached the end of their useful life. This program has a central budget.
B. UITC
   1. University Information Technology Committee
C. Desktop Computing Subcommittee
   1. USF's IT Governance subcommittee that oversees the maintenance and development of USF's desktop computing environment.

IX. FREQUENTLY ASKED QUESTIONS
A. (None)

X. REVISION HISTORY
A. 11-17-2014 – First publication
B. 03-01-2015 – Updated to new format and minor edits
C. 04-09-2015 – Changed RP to CR, updated links to forms in Appendix

XI. COMPLIANCE
A. Failure to follow this policy can result in disciplinary action in accordance with Human Resources Employment Handbook and Office of General Counsel employee and labor relations. Disciplinary action for not following this policy may include termination, as provided in the applicable handbook or employment guide.
XII. POLICY EXCEPTION PROCESS

A. A proposed exception request to ITS Policy requires a formal e-mail explanation related and in support of job function.

B. A proposed exception request to ITS Policy, mentioned in 'XII.A', must be approved via email by respective department or division supervisor, Dean, or VP, before submitted to ITS for review.

C. Forward approved email as stated in 'XII.B' to itshelp@usfca.edu for processing.

D. Evaluation of ITS Policy Exception will escalate internally, and as applicable may include further review by: UITC subcommittee(s), the Information Security Officer, and others as appropriate at the request of VP for IT.

XIII. APPENDICIES

A. Forms

1. Multiple Computers Request
   http://myusf.usfca.edu/system/files/MultipleComputerForm.doc

2. Missing Asset Form
   http://myusf.usfca.edu/files/missingassetformpdf