Equipment Refresh Strategy / Practices / Standards

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# **INTRODUCTION**

{This document/template introduces the process for Campus Wide Equipment Refresh}

# **PURPOSE**

* {This policy is intended to refresh a minimum set of necessary technology assets across the campus in a manner that is sustainable and within industry standards and best practices.

# **SCOPE**

{This document applies to the technology the institution provides to perform its functions. The document addresses three broad categories of technologies}

* “Front-end” devices
* “Back-end” infrastructure/devices
* “Standard Productivity” software.

{The document does not apply to non-standard technologies or mission-critical software}.

# **GENERAL AUDIENCE**

* Non-Classroom Faculty Members
* Infrastructure Administrators
* \_\_\_\_\_\_ Staff
* Responsible Administrator(s)
* Vice President for Information Technology and CIO
* Vice President for Finance and Administration
* Office of Information Technology
* Office of Finance and Administration

# **GENERAL CONTACTS ROLES AND RESPONSIBILITIES**

{Create a list of key players including roles and responsibilities} Sample:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Title** | **Contact** | **Phone** | **Email** | **Responsibilities** |
| Chief Information Offices |  |  |  |  |
| Procurement Manager |  |  |  |  |
|  |  |  |  |  |

# **GENERAL REQUIREMENTS FOR REFRESH**

* All full-time teaching Faculty, as well as adjunct teachers, who have shared computers are eligible for the refresh program.
* \_\_\_\_\_\_IT will maintain the inventory of Faculty computers and will periodically, no less frequently than annually, prepare a list of individuals whose computers have reached the designated refresh cycle – four years of use for General and Advanced users, three years for Super Users.
* Eligible teaching faculty will be notified by IT regarding their automatic eligibility for a computer refresh. The notification will identify the type (described below) of computer they will be getting based on their original computer assignment.
* Peripheral equipment (laptop docking stations, printers, mobile devices) are not included in the computer refresh program. At the discretion of IT, monitors may be included in a specific faculty member’s refresh.
* Individuals will only be entitled to one computer as designated by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
* The types of computer and user levels are determined by the job faculty are assigned to do. IT will work with Department Heads to determine the class of desktop appropriate for each Faculty member. The general framework for making these determinations are listed below.
* Individuals should never keep critical files (of any type) on a desktop/laptop computer. Critical files should be maintained on departmental drives (“M,” “N,” “T,” or College-approved cloud drives) to ensure that files are properly backed up.

# **COMPUTER TYPES AND USER LEVELS**

{The standardization of computer configuration is fundamental to efficient IT support, asset management, cost management, and inventory control processes}.

* Windows
* General: For Faculty who work in both desktop and internet-based applications such as MS Office, Google Apps, Banner, most Adobe applications, presentations, etc.
* Advanced: For Faculty who work in both desktop and internet-based applications including higher-end graphics, 3D, and media rich programs (Adobe Photoshop, Adobe Illustrator).
* Apple:
* General: For Faculty who work in both desktop and internet-based applications such as MS Office, Google Apps, Banner, most Adobe applications, presentations, etc.. including higher-end graphics, 3D, and media rich programs (Adobe Photoshop, Adobe Illustrator).
* Advanced: For Faculty who work in both desktop and internet-based applications including higher-end graphics, 3D, and media rich programs (Adobe Photoshop, Adobe Illustrator).
* Super User: For Faculty that work in very high-end graphic and video management software. These computers have extensive storage and processing power

# **KEY TERMS & DEFINITIONS**

|  |  |
| --- | --- |
| **Terms** | **Definition** |
| **Refresh** | Renewing technology devices and standard productivity software already procured and used at the College.  Refresh does not include the original (first time) purchase of any technology or enterprise and academic software, as these could be procured through various methods, such as, leveraged funds, grants, department operating funds, etc. |
| **Cascading** | Taking devices from one set of uses or people, where the technology has a substantial life in them, reimaging them, and deploying them to other uses/user groups.  For the “Refresh” program to be cost-effective and sustainable, cascading shall be minimized. |
| **Current** | Keeping technology working so that the work of the College is not hampered/diminished; the support of the environment is not overbearing/unmanageable; and security and compliance issues do not pose a risk to the College. |
| **Service delivery risk** | Not being able to provide the educational and administrative services of the College within acceptable levels of quality or mitigating, to a reasonable extent, regulatory, compliance or security risks for the College. |
| **Front-end devices** | Are one or more devices assigned to people, in addition to the SPDPP, such as, tablets, mobile devices (e.g., Phones).  These secondary devices are not included as ‘Refreshable’ items. |
| **Secondary devices** | Are one or more devices assigned to people, in addition to the SPDPP, such as, tablets, mobile devices (e.g., Phones).  These secondary devices are not included as ‘Refreshable’ items. |
| **Back-end devices** | Are IT infrastructure, such as data center equipment, network equipment, servers, routers, switches, to support the operations of the College. |
| **End of Life** | The product can no longer be purchased or supported through traditional channels. |
| **End of Support** | means hardware and software has no security and feature support from the manufacturer. |
| **Labs** | Common areas used for multiple purposes.  Portable units, such as ‘rolling carts’ of equipment for use in classrooms may be regarded as labs. |
| **Non-standard software** | Any additional software that is installed on systems, specifically to support unique/specialized business or functional activities or academic/instructional and administrative functions of the College. |
| **Mission-critical software** | Any additional software that is considered ‘enterprise-wide’ and used consistently to perform certain functions, such as, Minnesota State system-wide technologies and software, Learning Management System (LMS) software, Enterprise Resource Planning (ERP) software, human resources software, procurement software, student registration and enrollment software and others. |
| **Industry standards and best practices** | The common practices that other Colleges or private businesses follow to refresh their technology devices. |
| **Break-fix** | Fixing an immediate problem or system issue, one at a time, as they break or do not work anymore, on a device that is still relatively new and does not need to be refreshed. |

# **EQUIPMENT REFRESH PROCEDURE**

* Audience:
* Non-Classroom Faculty, Administrators, and Staff.
* Procedure:
* \_\_\_\_\_\_\_IT will share employee inventory lists with the respective Vice Presidents or Divisional Director to confirm the appropriate configuration for the individual.
* Once validated, \_\_\_\_\_\_\_IT will notify the individuals eligible for a refresh (along with their respective Vice President or Divisional Director) and provide instructions and a timeframe for the refresh.
* Individuals will then indicate that they have received the notification and approve the refresh timeframe.
* Individual computer user information is stored in a database housed in \_\_\_\_\_\_ IT. Any request to change the type of computer assigned to an individual employee must be made through the respective Vice President or Divisional Director. FIT IT will not accept change requests directly from individual employees.
* Individuals should never keep \_\_\_\_\_\_\_\_ files (of any type) on a desktop/laptop computer. FIT files should be maintained on departmental drives (“M,” “N,” “T,” or college-approved cloud drives) to ensure that files are properly backed up.
* Computers will be refreshed within the fiscal year in which they are determined to be end-of-life.
* Computers for new employees are handled as part of the standard on-boarding process. The computers will then be covered by this refresh policy.

# **COMMUNICATIONS PLAN / STRATEGY**

{Create a Communications Packet/Plan for distribution to affected users and stakeholders. Plan should include the following}

|  |  |  |
| --- | --- | --- |
| **Item** | **Sample** | |
| Purpose | Purpose for the Refresh | |
| Benefits | * Improves security while reducing cyber risks. * Modernizes technology and increases productivity * Provides easier management of various hardware and software. * Offers quicker problem resolution and so much more | |
| Dates |  | |
| Schedule |  | |
| Process |  | |
| Preparation Instructions |  | |
| Refresh DO’s and DON’Ts | **DO** | **DON’T** |
| Clean or remove ALL personal data from all computer drives; take them home on a NEW thumb drive. | Move everything from desktop, data files, docs and photos ONLY. Do not email files home; use thumb drive |
| Move **work** files from desktop to temporary "\_\_" drive folder. | Move programs (MS Word, Excel, etc.) from desktop to “\_\_" drive. |
| Save your favorite website links. See the FAQs for instructions**.** | Copy or move shortcuts. |
| Clear work area of personal items and devices prior to new computer installation/deployment (photos, earbuds, thumb drives, card readers, Bluetooth mouse, fans, etc.). Techs will need a clear area to work efficiently. | **Wait until the last minute!** |

# **INVENTORY MANAGEMENT**

{Create a current inventory list of all equipment identified for refresh. Equipment may include, but not limited to the following: desktops, laptops, servers, switches, routers, mobile devices, radios, printers, copiers, scanners, imaging devices, sensors and related equipment, firmware, and operating software. The inventory should note at least the age of the computers and the property control number. However, it is better to also note the type of CPU, amount of memory, size of hard drive, and type of monitor.

# **BUSINESS REQUIREMENTS**

{Identify the business requirements and list options that may result in cost and improving functionality. Options to examine include virtualization, consolidation of servers, using a cloud provider, and choosing a hosting service. After you analyze additional solutions, you can start to plan the best course of action for your business requirements}

# **ROLL-OUT PLAN / SCHEDULE**

{Create a roll-out schedule/plan to refresh in phases - focusing on the least critical areas to minimize disruptions. Consider the possibilities of:}

|  |  |
| --- | --- |
| **Item** | **Description** |
| Schedule Changes | Refresh projects require coordination from application, software, facilities and infrastructure teams. You need to ensure there is enough power, connectivity and a well-constructed plan to test the migration of applications. Upon completion, |
| Target Coverage Gaps | Depending on the timing of the refresh, it may need to be delayed requiring holding onto existing hardware available for 6-12 months in case a rollback is required. |
| Identify Cost-Cutting Measures | Due to budget constraints |

# **FINANCIALS (COSTS)**

{Create a budget to include the cost of equipment refresh which should include the following}

* Equipment purchases costs
* Sales taxes
* Transportation
* Insurance (to cover transportation costs)
* Equipment Assembly
* Equipment Lease
* Maintenance contracts
* Application Licenses
* On-going costs
* One Time costs
* Collateral Costs
* Equipment Repairs {without vendor SLA}
* Risks
* Unexpected costs associated with price increases.

# **RISK ASSESSMENT**

|  |  |
| --- | --- |
| **Risk Category** | **Definitions** |
| **Catastrophic Risk** | Any data where the unauthorized disclosure, alteration, loss, or destruction may be catastrophic to human life |
| **High Risk** | Any data where the unauthorized disclosure, alteration, loss, or destruction may:   * Cause personal or institutional financial loss or the unauthorized release of which would be a violation of a statute, act or law. * Constitute a violation of confidentiality agreed to as a condition of possessing or producing or transmitting data. * Cause significant reputational harm to the Institution or \_\_\_\_\_\_ System; or, * Require the \_\_\_\_\_\_ System to self-report to the government and/or provide public notice if the data is inappropriately accessed. |
| **Moderate Risk** | Any data where the unauthorized disclosure, alteration, loss, or destruction may have a mildly adverse impact on the mission, safety, finances, or reputation of the Institution or \_\_\_\_\_\_ System.  Data not specifically identified in another risk level is categorized as a "Moderate Risk" |
| **Low Risk** | Any data where the unauthorized disclosure, alteration, loss, or destruction would have no adverse impact on the mission, safety, finances, or reputation of the Institution or \_\_\_\_\_\_ System. |

# **IMPLEMENTATION**

{Create a Technology Plan, or process to determine who will be responsible for the implementation of the new equipment}

* Supplier
* \_\_\_\_\_\_ Technology

# **ROLES AND RESPONSIBILITIES**

* \_\_\_\_\_\_\_\_\_\_ Responsibilities
* Receive delivery of equipment, perform asset tagging, and add information to asset inventory
* Contact customer when equipment has arrived, and schedule an appointment for equipment delivery
* Notify customer of the software included in the standard image
* Backup user files and personal settings from old equipment
* Setup new equipment
* Install specially requested software, after license verification
* Install printers and peripherals, network or local
* Replace user files
* Configure Email for customer
* Configure Wireless, if applicable
* Test to make sure all software/hardware devices are installed correctly
* Remove any equipment that no longer meets campus standards (and provide replacement equipment, if needed and available)
* User responsibilities
* Notify \_\_\_\_\_\_\_\_\_\_ when a computer is being re-deployed to another person.
* Be available during the scheduled appointment time
* Prior to the appointment, identify any additional software that is required outside of the standard image
* Provide media and licensing for any non-standard software, if not originally purchased and installed through \_\_\_\_\_\_\_\_\_\_.
* Provide equipment to be re-deployed if necessary
* If possible, ensure that a network(data) jack is available and activated

# **REQUESTING SERVICES**

* In Scope Services
* Deliver equipment to department or staff office
* Setup the new equipment
* Install licensed standard software and customer-provided licensed software
* Remove old/existing equipment
* Redeploy existing equipment to another customer (one trickle-down only)
* Reimage the replaced computer before redeployment
* Replace existing equipment with a stock machine if below standards, when possible
* Provide a loaner computer if the reimage is scheduled for an extended time
* Out of Scope Services
* Redeployment of older equipment to multiple customers in office, in a trickle-down strategy.
* Clearing area for new equipment/moving furniture
* Providing cables for existing peripherals or printers (these must be ordered)
* Installing unlicensed software

# **HELP DESK COVERAGE HOURS & SERVICES**

* Help Desk Hours
* {The helpdesk can be contacted for any requests concerning new computer setups and re-deploys at \_\_\_\_\_\_\_\_\_\_\_\_\_ or at helpdesk@\_\_\_\_\_\_.edu
* For “Helpdesk Hours of Operation” see Get Help.}
* Setups Schedules

{Setups are between the hours of 8am and 4:30pm. Any computer setup (new or redeployed) is typically scheduled for 2 hours to ensure that all files are transferred, and all hardware and software is installed correctly; basic training is also provided, if needed. Redeployment of equipment being replaced is not performed at time of new equipment setup and requires an additional appointment to be scheduled unless previously arranged.}

* Delivery Schedules

{Unless alternate instructions are provided with the request, the Helpdesk will send the first email request to schedule the delivery and setup of new equipment within 2 business days of receiving the equipment. If no response is received, a second notice will be sent via email with a copy to the department in case there is an issue with the customer checking their email account}

* Escalation Procedures

The Helpdesk is the initial contact for all service-related requests. Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_, or helpdesk@\_\_\_\_\_\_.edu

# **SURPLUS EQUIPMENT PROCESSING**

* **Removal of Surplus Equipment**
* Service Level Agreement (SLA)

Surplus equipment is provided via a Service Level Agreement (“SLA”) between the campus community and \_\_\_\_\_\_\_\_\_\_ to document:

* Service Description

{Surplus Equipment Processing is the service for removing unwanted technology equipment from campus offices, labs, and classrooms. Once removed, \_\_\_\_\_\_\_\_\_\_ serves as a clearinghouse for the equipment, which is evaluated, and either kept for potential redeployment or recycled as part of the TREE (Technology Repurposing & Electronic E-cycling) program}

* Customer Responsibilities
* Submit a request to the TSC Helpdesk using the iConnect-Tech Support-Self system. Simply log-in to the system, select “Request Help” from the main menu (or Submit a Ticket from the left-hand menu), which will take you to the ticket form. From the Common Needs menu of services, select "Technology Equipment Pick-up Needed" and the form will fill in prompts for needed information.
* Place the items in an easily accessible location, if possible.
* If it is necessary to retain computer data stored on the hard drive, it is the
* customer’s responsibility to transfer the data in advance of the collection day.
* If assistance is required, the customer will make arrangements with the Help
* Desk in advance.
* \_\_\_\_\_\_\_\_\_\_ Responsibilities
* Maintain a regular monthly schedule of surplus equipment collection. Currently, pickups are made every Friday. (If a pickup is needed sooner, it will be noted in the ticket.)
* Collect all items that have been identified on a surplus declaration form
* Notify customers if there is a change in the scheduled collection date, or if the items requested will require special arrangements due to quantity or type.
* Track surplus equipment removal information in asset inventory
* **Surplus Redeployment to the Campus**

Customer responsibilities

* Use iConnect Tech Support.
* When requesting surplus equipment for special projects (not replacing non-functioning equipment), departments should provide a reason as well as a timeframe for usage, as part of the request
* Make plans for new equipment purchases; surplus equipment that replace failed equipment is only a temporary replacement solution.
* \_\_\_\_\_\_\_\_\_ Responsibilities
* Maintain a stock of used technology equipment that can be redeployed.
* Assess and respond to all requests for surplus equipment.
* Make surplus equipment temporarily available to departments to replace non-functioning equipment, while departments make decisions to repair or replace.
* Evaluate all requests for surplus equipment for special projects, to either approve the request or offer an alternative solution.
* Document all re-deployment information in asset inventory

# **REQUESTING SURPLUS SERVICES**

* In Scope Service
* Collecting equipment on the scheduled pickup dates (1st and 3rd Fridays of the month)
* Maintaining a pool of re-usable stock equipment received from departmental surplus.
* Keeping an up-to-date asset inventory that tracks equipment location and status.
* Ensuring data removal from previous owners.
* Making surplus equipment available for temporary replacement.
* Out of Scope Services
* Collecting equipment that has not been declared on a surplus declaration form
* Collecting equipment on a non-scheduled date, unless special arrangements are made in advance.
* Performing additional tasks on collection day other than collection, such as copying data from old computers
* Offering equipment to replace or repair non-\_\_\_\_\_\_ equipment.
* Returning specific equipment to departments after the surplus collection
* Providing surplus equipment to departments as regular replacements, in lieu of new equipment purchases.
* Surplus Hours, Coverage and Escalation
  + Acquisition: In order to pick up surplus equipment, \_\_\_\_\_\_\_\_\_\_ must submit a [helpdesk request ticket.](https://uww.service-now.com/sp/)
* The Help Desk can be contacted for any requests regarding surplus equipment. Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_or [helpdesk@\_\_\_\_\_\_.edu](mailto:helpdesk@usc.edu).
* Responding to Problems and Incidents
* The Help Desk is the initial contact for all service-related requests. Phone: \_\_\_\_\_\_\_\_\_\_\_\_ or helpdesk@\_\_\_\_\_\_.edu
* Check the Get Help for service hours. Impact Level 2 and 3 service requests will be handled during normal business hours. If a department/division does not receive a contact within the specified time for their Impact Level, an email should be sent to [sla-\_\_\_\_\_\_\_\_\_\_@\_\_\_\_\_\_.edu](mailto:sla-ICIT@usc.edu).

# **REFRESH IMPACT LEVELS**

|  |  |  |  |
| --- | --- | --- | --- |
| **Impact Level** | **Explanation** | **Examples** | **Initial Response Time** |
| Impact Level 1 | Campus-wide problem occurs  No temporary or workable alternatives available | Not Applicable to the surplus department |  |
| Impact Level 2 | Limited amount of users or groups are affected | A machine is non-functional and in need of repair or replacement | During Business Hours: Four hours |
| Impact Level 3 | Individuals are affected | Machine is functioning but is out of date and below campus standards. | Response will be within two business days |

# **OVERVIEW AND TIMELINES**

{Computer replacements occur twice a year, fall and spring semesters.  When computers become eligible for replacement, the department chair and department head will be contacted via email and directed to a form listing their options and which computers are due for refresh.  The email message notifying them of the replacement will contain a deadline for their reply.  If they do not respond by that time, replacement will be deferred until the next phase.

Once the new computer is ready for delivery, \_\_\_\_\_\_\_\_\_\_\_ will contact faculty and staff directly to setup a mutually-convenient time to deliver the new equipment.  \_\_\_\_\_\_\_\_\_\_ staff will transfer data from the old computer to the new one}

# **COMPUTER STANDARDS**

{\_\_\_\_\_\_\_\_ has developed computer standards in order to keep support costs down. By using standard hardware, operating systems, and applications, \_\_\_\_\_\_ can reduce the total cost of ownership, the time it takes to deploy a computer to a user/department, and the time it takes to fix and support issues. Laptops will be issued for ease and mobility.

* Laptop – Dell Latitude (if desired; includes a Dell LCD, docking station)
* Laptop – Apple Macbook Pro 14in (if desired, includes a Dell LCD, docking station)
* Laptop Eligibility

{The department Manager will determine who qualifies for a laptop, and adhere to;}

* The user/department will surrender the workstation
* The laptop will be placed into the \_\_\_\_\_\_\_ Computer Refresh Plan instead of the desktop
* The user will utilize VPN when connecting to the campus to access \_\_\_\_\_\_ specific applications or data stores
* User will read and sign the Mobile Device Standard form
* **Tablet (iPad or Android)**

{Tablets may be purchased with \_\_\_\_\_\_\_\_\_\_approval and purchased with departmental funds and will not be refreshed with \_\_\_\_\_\_\_\_\_\_fund}

* Emeritus Status

{When a faculty is granted Emeritus status, they can keep their existing computer if it is fully depreciated or receive a loan of an older computer. All Chapman data and software will need to be removed and the computer will not be refreshed or replaced}.

* Department Responsibilities
* Theft Replacement (lost or stolen)
* Tablet (iPad or Android) Device Replacement or Repair
* Replacement or new monitor (except new hire covered by \_\_\_\_\_\_\_\_\_\_Plan)
* Additional LCD
* Office Printers (non-network)
* Standard Scanners
* Secondary computers (not including student employee computers)
* Notify \_\_\_\_\_\_\_\_\_\_of new positions created

# **APPENDIX A: POLICIES AND AGREEMENTS**

|  |  |  |
| --- | --- | --- |
| **Global Policies**  Global policies are maintained to set guidelines expected behavior of all \_\_\_\_\_\_ campus community members while using shared network and computer resources. | **Operational Policies**  Operational Procedures define \_\_\_\_\_\_\_\_\_\_'s services, expectations, and role as part of the campus community. | **Service Level Agreements**  Service level agreements (SLA's) allow Instructional, Communication and Information Technology to offer colleges, departments, and \_\_\_\_\_\_ organizations IT services on an enterprise level. |
| * Acceptable Use Policy * Account Lifecycle: Change of Role and Separation Practice * Directive * Authentication Policy * Copyright * Email * File Storage * General Access Lab Policies * Information Security * Minimum Password Standards * Network Infrastructure Use * Photo Privacy * Printing * Securing Access to \_\_\_\_\_\_-Network * Security Awareness Policy * Shared User Accounts Practice Directive * Social Security Number * Web Accessibility * Web Browser Support * Web Publications * Workstation Administrative Privileges Practice Directive | * Asset Classification * Campus Computer Repurposing & Surplus Process * Chargeback for Technology Support * Computing Environment Support Policy * Desktop Support Service Guidelines * Desktop Operating Systems Support * Data Custodianship * Data Handling After a Campus Official's Departure * Employee Checkout/Off-Boarding * Guest Access * Information Outsourcing * Ingeniux & Google Analytics * Listserv Policy * Securing Office Computer Equipment * Port Activation * Surveillance Camera Use * Technology Purchasing & Acquisition * Web DNS Policy & Naming Guidelines * Operational Guidelines * VoIP Operational Guidelines * NetID Position Brief * Web Content Expiration Guidelines | * Academic Computing Lab Support * Blogs@\_\_\_\_\_\_ * Cellular Telephone Services * Class Climate * Computer Setup and Re-Deployment * Restoration of Deleted Email * Digital Signage * Enterprise PHP Hosting * General Access Computing Lab Support * Ironport * Maps * \_\_\_\_\_\_ Office & Lab Printing * Software Acquisition & Installation * Surplus Equipment Processing * Video Surveillance * Virtual Private Network (VPN) * Wireless Access * Workstation Computer Support |

# **APPENDIX B: POLICY REQUIREMENTS**

\_\_\_\_\_\_ will have well-managed procedures and plans for maintaining, upgrading, modernizing, and replacing IT infrastructure assets. To accomplish this goal, it is recommended that \_\_\_\_\_\_:

* 1. Implement and maintain policies, procedures, and controls to ensure the proper management and recapitalization of IT infrastructure assets, including validation of the annual refresh schedule. Validate the implementation of this policy through an annual IT infrastructure assessment.
  2. In accordance with applicable law and regulation, such as the Federal Acquisition Regulation, ensure use of common standards, configurations, and strategic sourcing vehicles when procuring and maintaining IT infrastructure assets, if available.