

University End-User Computing Device Lifecycle Policy

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Version History

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1.1	Clarification of funding source for teaching and open access purchases (Appendix A). Removal of FTE constraints (Appendix A)	John Green	Andrew Crozier Simon Townley Angus Rae	5/7/18

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1 Definitions

Add-on device	Equipment intended for connection to an EUCD (for example, a monitor), but which is acquired as an 'extra'; i.e., not as part of an EUCD Package.
CPU	Central processing unit
EUCD	End User Computing Device – any desktop or laptop personal computer.
EUCD Package	An EUCD, plus any essential connected equipment, such as monitor, keyboard, docking station, mouse, as appropriate.
EUCD/package	EUCD or EUCD package.
GPU	Graphics processing unit.

2 Purpose

Given the nature of the University's business, its expenditure on complex IT products is considerable. More than that, IT products are especially vulnerable to obsolescence, misspecification and inadequate justification at the point of purchase. This policy lays down the behaviours that will be maintained across the University community in order to minimize waste in that regard. The scope of this policy is limited to EUCDs and EUCD packages.

3 Scope

This policy applies to any EUCD/package purchased by the University, irrespective of the internal source of funding. It also addresses certain aspects of the management of add-on devices.

4 Policy Statements

4.1 Acquisition of EUCDs

All University members' EUCD package requirements will be submitted as formal service requests, via the Digital IT team. The University's central purchasing function will reject purchase requests or purchase orders for EUCD packages, originating from any source other than Digital IT's Asset Management team.

4.2 EUCD Product Portfolio

For the purpose of ensuring continuity of supply, warrantability, compatibility and functional maintainability, the University's Digital IT function will maintain a defined portfolio of EUCD Packages and add-on devices—or 'EUCD products'. This is known as the EUCD Product Portfolio

4.3 Usage Categories

For the purpose of policy implementation, the University has identified the following categories of usage for EUCD packages and add-on devices:

- 1 Research**—Acquired as part of a research project.
- 2 Commercial**—Acquired for commercial purposes; for example, as part of a revenue-generating project.
- 3 Teaching and Open Access**—Acquired as part of a project to equip an open-access or teaching space.
- 4 Ad hoc functional**—Shared/multi-user; typically used for University administrative purposes—such as a reception or other team-resourced function—or shared between multiple part-time users.

5 Postgraduate—Allocated to a postgraduate student for the duration of their study/research at the University.

6 Individual Employee primary package—(Applies specifically to EUCD packages) Allocated to a University employee or job-share, for use as their primary ('day-to-day') computing resource.

4.4 Funding and Availability

The source of funding and the availability constraints for each usage category (as defined in section 4.3) is given in **Appendix A**.

4.5 Fitness for Purpose, Avoidance of Waste and Role Standards

As a general principle, the Digital IT team will supply EUCD packages with the objective of meeting functional requirements but, at the same time, avoiding excess or waste.

Applicable to usage categories 3-6 (as defined in section 4.3): To ensure University members have access to EUCD packages appropriate to their role, the University will define and maintain a set of *user role categories*; every University post or active membership role will fall under at least one such role category. For University posts/roles in each role category, a specific subset of the EUCD product portfolio will be designated as appropriate. Within each such subset, each EUCD package is referred to as a *role standard* for the relevant University member role.

4.6 EUCD Warranty

A warranty period will be defined for every EUCD package and add-on device. Digital IT will not commit to the support or repair of any EUCD package or add-on device for which the warranty period has expired.

4.7 EUCD Lifecycle-related Policy

Request

All requests for EUCD packages and add-on devices will be submitted by way of formal service requests, via the Digital IT service portal or service desk function. All EUCD/add-on device requirements will be fulfilled via this route, **except** in the case of automatic refresh—see section below: *Retirement and Refresh*.

Requests for centrally-funded EUCD packages will take the form of stated requirements, not specific product selections: Based on an assessment of requirements, the Digital IT team will either provide an appropriate product, or will invite the requester to select from a limited range of available products.

Fulfilment

Ordinarily, Digital IT will fulfil EUCD package requests from the Product Portfolio. Additionally, for EUCD packages in usage categories 3-6 (as defined above), Digital IT will fulfil each request by supplying a role standard EUCD package. Exceptions will be permitted only in response to genuine business or functional requirements.

Whilst the majority of EUCD package requests are fulfilled either from new stock or by way of external purchases, used stock will be issued for re-use where possible. Before any used EUCD is issued for reuse, any data (including application software and operating system files) held on the device will be erased.

University EUCDs that include internal operating systems (Windows, Mac OS, Linux, etc.) will be configured based on a Digital-IT-supplied 'disk image'.

Asset Labelling

For asset-management and configuration-management purposes, an official, permanent University asset label will be applied to the casing of all laptop devices and desktop base units owned by the University.

Title

All EUCDs/packages and add-on devices purchased by the University remain the property of the University as a whole. Regardless of the source of funding, title cannot be assumed by individual employees or specific University departments under any circumstances.

Custodianship

Every EUCD acquired by the University—whether for shared or individual use—will have a named *custodian*, who will remain responsible for the care of the device.

For any EUCD allocated to an individual employee: The individual will retain custodianship either: a) until they leave the University; b) Until Digital IT are advised that the EUCD is no longer required by the individual; or c) Until the EUCD is withdrawn due to its retirement (see section below: *Retirement and refresh*). Where an employee leaves the University, or where Digital IT have been otherwise informed that the employee no longer requires a particular EUCD package, it will either be prepared for a new user, returned to storage or disposed of (refer to the section below: 'Disposal').

For any EUCD package allocated to a team, a group of part-time users, job-share or business function: Custodianship remains with the manager of the function(s), team(s) or group(s) that use the package or, in the case of devices for public use, with the manager of the function that provides the relevant public service. Where Digital IT are informed that an EUCD/package is no longer required, it will either be prepared for a new user, returned to storage or scheduled for disposal (refer to the section below: 'Disposal').

Registration

The University's Digital IT function will maintain a formal register of all EUCDs owned by the University; its content will include the identity of the custodian for each EUCD.

EUCD Retirement and Refresh

In order to optimize the value provided by EUCDs, Digital IT will maintain processes by which every EUCD is considered 'retired' when it reaches the end of its defined warranty period. Upon its retirement, the Digital IT team will normally collect an EUCD for disposal, depending on practical circumstances. The detailed policy regarding refresh (replacement) of retired devices is included in Appendix A.

Disposal

Digital IT are responsible for disposal of EUCDs and add-on devices, in line with relevant UK/EU regulations, and additionally, in line with any other relevant University policy applicable at the time. Disposal in this regard includes the secure erasure of any data held within devices.

Under no circumstances will the University sell, donate or give away any EUCDs, components of EUCD packages or add-on devices.

5 Exceptions

Any deviation from this policy will require the explicit approval of the Head of Desktop Services (Digital IT team).

Appendix A – Funding Source, Constraints and Refresh Policy Per Usage Category

Usage Category	Constraints	Funding Source for initial purchase	Refresh (replacement) policy.
EUCD Package for individual employee/job-share primary use	<ul style="list-style-type: none"> No more than one device can be allocated to any individual or job-share. There is no option for local funding of packages in this category, either wholly or in part. 	University central EUCD fund	Automatic refresh on each retirement, until employee leaves the University or changes their role.
EUCD package for individual postgraduate use	<ul style="list-style-type: none"> No more than one device can be allocated to any postgraduate. There is no option for local funding of packages in this category, either wholly or in part. 	University central EUCD fund	Automatic refresh on each retirement until student leaves the University
Add-on device for individual employee, postgraduate or ad hoc functional use	Requires business justification. There is no option for local funding of devices in this category, either wholly or in part.	University central EUCD fund	No automatic refresh.
EUCD Package for ad hoc functional use (including any add-on devices).	Requires business justification. There is no option for local funding of packages/devices in this category, either wholly or in part.	University central EUCD fund	No automatic refresh.
EUCD Package for teaching and open access (including any add-on devices)	-	Relevant project budget	Automatic refresh on each retirement, until the teaching/OAA facility is closed down.
EUCD package for research use (including any add-on devices)	<ul style="list-style-type: none"> Once a research project is closed, Digital IT may recall and redeploy any packages (including any add-on devices) that were assigned to the project. 	Requester's/project cost centre	No automatic refresh.
EUCD package for commercial use (including any add-on devices)	-	Requester's/project cost centre	No automatic refresh.

Table 1 – Funding and Refresh Policy Detail.