Policy Name:	Information Technology Procurement Policy
Originating/Responsible Department:	Information Technology Services (ITS)
Approval Authority:	Senior Management Committee (SMC)
Date of Original Policy:	November 2023
Last Updated:	November 2023
Mandatory Revision Date:	November 2028
Contact:	Associate Vice-President Information Technology Services and Chief Information Officer

Policy:

The standardization of Information Technology (IT) equipment procurement assists in the optimization of institutional investments and the supportability of our technical operating environments. This ensures the best possible price, and minimizes the associated costs of technical support, training, and infrastructure, as well as providing access to the support services offered by Information Technology Services (ITS).

Purpose:

The purpose of this Policy is to identify the procurement vehicles that ensure that the University receives the best benefit in terms of cost and functionality when purchasing IT equipment. The benefits realized include:

- Obtaining the best value through leveraged buying power; e.g.; volume discounts, partnerships;
- Standardized IT equipment, peripherals and components that meet business and security requirements;
- Improved equipment deployment and support;
- Maximum assurance of software compatibility; and
- Adherence to the Ontario Broader Public Sector (BPS) Procurement Directive and applicable law.

Scope:
This Policy applies to all faculty and staff responsible for purchasing, maintaining and disposing of IT equipment within their organisational units.

Interpretation
1. This Policy shall read in conjunction with other policies that may, in certain circumstances, govern data protection risk management matters, including collective agreements, IT and information security policies, and records management and archives policies and procedures.
2. This Policy shall be read in conjunction with any directives, guidelines and procedures that are established concerning data protection.

Procedures:

1. **Desktop, Laptop and non-cellular IT Equipment**
   a) Acquisition from Preferred Vendors
      All desktop and laptop computer equipment purchased with university operating funds

must be made through the University's preferred vendors. Equipment acquired through preferred vendors includes maintenance and repair.

When purchasing systems that are from grants or under contractual obligations to use specific equipment, ITS can assist researchers in their computer equipment selection to ensure researchers are acquiring equipment that is suitable for their needs and meet the management, security and policy requirements of the University.

b) Delivery

Delivery of desktop and laptop computer equipment from preferred vendors is by default made to ITS for installation and configuration in accordance with university IT standards. Departments may have equipment delivered directly to their local computing support units.

c) Repair (Warranty)

Desktop and laptop computer equipment repairs and parts installations must only be performed by trained technicians.

When there is an equipment failure, diagnosis by an ITS technician or other qualified individual is required before contacting the manufacturer to avoid unnecessary charges back to the University.

d) Disposal

The university must dispose of IT equipment in an environmentally responsible manner. All university owned electronic equipment must have all university data disposed of in accordance with the Data Protection and Risk Management policy.

At the end of its useful life at the discretion of the Department Head, equipment may be:
- Sold through the University's surplus sales program, the CUrb;
- Transferred or donated to another entity as may be permitted; or
- Safely and sustainably disposed of through appropriate channels.

e) Software Image

ITS provides build images which include operating system and enterprise applications for use.

Because of various licensing agreements, to be eligible for an ITS image, the end user device must be owned by Carleton University and have a properly licensed operating system.

Installation of additional software purchased from other vendors will be on a "best effort" basis.

f) Software Image Support

The Microsoft Windows based images provided by ITS are designed specifically for those models of desktop and laptop computer equipment from our preferred vendors. These images may or may not work on equipment purchased through other vendors.

A fee will be charged for modifying and testing ITS provided images for use on non-standard equipment as per the Internal Charges Policy.

ITS provides limited technical support for software that is included in the image. This

support includes assistance with installation.

Some departments choose to create and maintain their own images separate from those provided by ITS. In this case, support can be provided by ITS on a "best effort" basis in conjunction with departmental technical support staff.

2. **Cellular Equipment**
   a) Carleton University manages commercial agreements with Wireless providers. All fulltime faculty and staff requiring a mobile device for business purposes are required to use the university's centrally managed corporate account. Only one corporate account per wireless provider is permitted and is managed by ITS.
   b) The university has established eligibility criteria for the provisioning of cellular equipment:
      i. Active faculty or staff are eligible for the corporate plan with prior written approval from their Director or delegate as indicated by the business unit Vice-President.
      ii. Part time, Casual, or Term employees are not eligible for university funded mobile device nor for the corporate plan. With prior written approval from the hiring Director or equivalent level, part time, Casual and TERM employees are permitted to expense a portion of their personal mobility plan, up to maximums as identified by Carleton University in employment Terms and Conditions.
      iii. Mobile devices and mobility plans supported by internal and external research grants or contracts must comply with Carleton University's Research Expenses Guidelines. Specific funding agency rules and regulations may take precedence and should be consulted.
      iv. Jail Broken or Rooted devices will not be eligible for the corporate account nor reimbursement and are prohibited from use with university enterprise services such as email.
      v. To protect the university, university provisioned mobile devices must be running ITS managed Mobile Device Management Software.

3. **Telecommunications Cabling and Wiring**
   a) All telecommunications cabling and wiring must be authorized or installed by ITS and adhere to the Occupational Health & Safety Act.
   b) Cabling and wiring that is localized to a specific geographic footprint and patch cables connecting devices to data ports in the wall are exempt from this policy; for example, cables in a small departmental testing lab environment where there is no connectivity outside of the test environment would not fall under the scope of this policy.

Roles and Responsibilities:
1. The Assistant Vice-President, ITS and CIO shall be responsible for oversight of centralized IT equipment at the University.
2. Deans shall be responsible for oversight of faculty-specific IT equipment within their area of responsibility.
3. Users of IT equipment shall be responsible for ensuring compliance with the university's Acceptable Use of IT and Email Policy within their daily operations.

Contacts:
Director, Client Services, Information Technology Services

Links to related Policies:
- Acceptable Use of Information Technology and Email
- Access to Information and Privacy
- Administrative Data Collection, Access and Usage
- Data Protection and Risk Management
- Electronic Monitoring
- Procurement Policy
- University Information Technology (IT) Security