

Information Services and Technology

IT Procurement Centre

Apple Computer Equipment

Procurement and Repair Process

Version 2.1

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UNIVERSITY
OF MANITOBA

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Document Summary

Purpose

This document was created by the IT Procurement Centre to support the University of Manitoba in the purchasing of Apple products. This document relates to RFP #ITPC-0080-1516-LB.

Intended Audience

This document is intended for IT staff who enable Apple products through purchasing and support. Some general knowledge of IT Procurement and Support is assumed and not detailed in this document.

Location

Cherwell Knowledge Database

Reviewers

- Monique Whitehill, Manager, IT Procurement Centre
- Brenda McArthur, Manager, Service Desk
- Jeff Haaksma, Manager, Client Support

Approvers

- K-L Holter, Director, Client Services
- Adam Gerhard, Director, Planning and Governance

Revision History

Version	Date	Author	Changes
0.12	12 October 2016	Scott Wellman	First Published Draft
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1 Overview

The University of Manitoba, as part of RFP #ITPC-0080-1516-LB, has contracted with Simply Computing as our vendor for Apple Computer products and repair services.

For the most part, the process is transparent to the client, who should always contact the IST Service Desk for all support issues. IST Client Support will help users assess needs, obtain quotes, configure and install devices, and send devices for repair if required.

1.1 Service Desk

The unit is responsible for providing service desk (tier 1) support, which includes: first point of contact for computer and account support, computer accounts management, audio-visual and classroom technology booking and incident reporting. This unit is accountable for the development, implementation and management of the incident, request fulfillment, problem management, and knowledge management processes. The team maintains the system administration functions for the telephone system, is a co-owner, supports the operational practices of the PC commissioning and decommissioning (PCCD) process, and is a key stakeholder in the delivery of the university's access management practice.

1.2 Client Support

IST provides desk side support for clients in IST supported areas. These activities include: installing, configuring and maintaining desktop computers, laptops, printers, peripherals, mobile devices and telephones (mobile and landlines) in University work spaces, open areas labs and teaching labs; servicing and facilitating repair of computers and classroom technology components in classrooms and maintaining appropriate security patching and antivirus protection for desktop and laptops. The team is responsible for managing site licenses for some administrative desktop software packages and for supporting software and hardware installed or attached to these computers including some business area and faculty specific applications.

1.3 Distributed IT

For departments and divisions where services are provided by Distributed IT partners, references to *the IST Service Desk* and *IST Client Support* teams or roles can be assumed to be the Distributed IT Partner.

1.4 Exclusive Supplier

Simply Computing was selected through a competitive process as the **Exclusive Supplier** for the University of Manitoba's Apple products and services. It is the expectation that all Apple products be purchased through this vendor in accordance with the Exclusive Supplier & Administrative Systems Policy.

https://www.umanitoba.ca/admin/governance/media/Exclusive_Suppliers_and_Administrative_Systems_Policy_-_2014_02_04_RF.pdf

1.4.1 Exceptions to Exclusivity

1. Any exceptions to the use of Simply Computing must have approval of the ITPC.
2. Accessories may be purchased from any vendor including (for example) the U of M Bookstore.
3. Special consideration for CFI Grants (See Appendix F) and special pricing may require purchasing through Apple Canada. This should be done through the ITPC.

The process defined here, and the process clients will engage with through contact with IST, assumes the use of Simply Computing except where noted.

1.5 High Level Process

At a high level, the process involves three major components:



- **Consult** – Advice, information and quote generation regarding Apple products, accessories and services
- **Purchase** – Process to acquire Apple products, accessories and service
- **Support** – Repairs and upgrades to Apple products

1.6 General Principles

1.6.1 Consistency of Process

All Apple computer purchases must follow this process.

Use of credit cards including P-Cards, Travel & Expense cards, or personal credit cards for computer purchases is not permitted. For exceptions or special circumstances, please contact the ITPC in advance of purchase.

1.6.2 Single Point of Contact

As a general principle, clients should always contact the IST Service Desk for any assistance with technology, specifically including the purchase and support of Apple products.

1.6.3 Multiple Points of Entry

Clients may enter the process at multiple points. The following are key entry points into the process for clients:

1. **Consult.** The primary entry point is consulting. Clients contact the IST Service Desk with a general request to purchase a computer. IST Client Support will provide advice and acquire a quote that can then be used by the client to proceed with purchasing.
2. **Purchasing.** Clients may choose to acquire a quote outside of IST and may enter the process directly at the purchasing stage.
3. **Support.** Clients will contact the IST Service Desk for support with their Apple products.

1.6.4 Custody and Control

The University of Manitoba has policies and procedures regarding the security of its devices and the data on them.

https://www.umanitoba.ca/admin/governance/media/Custody_and_Control_of_Electronic_Devices_and_Media_Procedures_-_2015_06_23_RF.pdf

Devices should not be sent off site without due process. This includes off site upgrades and repair.

1.7 Key Client Contacts

For Apple computer purchasing, contact the **IST Service Desk**.

For Apple computer support, contact the **IST Service Desk**.

1.8 Key Support Contacts

Support	Primary/General	Escalation
Simply Computing	Simply Computing 1.888.688.1468 umanitoba@simply.ca 303 St. Mary's Road Winnipeg, Manitoba R2H 1J5	Mr. Gordon Gentes Store Manager 204.942.6227 extension 4004

1.9 Standard Equipment

IST has a pre-defined configuration for what is considered “standard” equipment options. These devices require less approval in EPIC. If a client requires alterations to the standard equipment, this “Custom to Order (CTO)” system will be identified by the ITPC and routed to the IST Client Support Manager for approval in EPIC.

2 Consult

The consultation is a conversation between IST and the client that should result in a detailed quote for equipment, accessories and/or service that meets the client’s needs.

Generally, the client will contact IST Service Desk to create a ticket for consulting services. Optionally, the client can acquire a detailed quote through Simply Computing. Note that special considerations exist for CFI Grants that require involvement of ITPC (see Appendix F).

2.1 Process: Consult

INPUT: Request for Consultation

OUTPUT: Quote

2.1.1 Client

1. Contacts IST Service Desk to request information about purchasing Apple products, accessories or services.

2.1.2 IST Service Desk

1. Provides FAQ and general advice/direction.
2. May dispatch IST Client Support for a detailed consult.

2.1.3 IST Client Support

1. Consults with the client.
2. Communicates with Simply Computing to acquire a quote.
 - a. If the purchase is part of a CFI Grant, See Appendix F for special considerations.

3. Provides the quote to the client.
4. Resolves the ticket.

3 Purchasing

Purchasing is the general process required for any products and services that have financial implications. However, some warranty support issues may not require purchasing.

3.1 Process: Purchase

INPUT: Quote

OUTPUT: Configured System

3.1.1 Client

1. Create EPIC Purchase Request.
2. Attach Simply Computing quote.
3. Attach PC Commissioning Form (PCCF).
http://umanitoba.ca/campus/bookstore/computers/media/Commissioning_Form-EPIC.pdf.
4. Submit for Approval (note: EPIC approval will proceed as per standard process).

3.1.2 ITPC

1. Review EPIC Purchase Request for completeness.
 - a. For CTO systems, in addition to the financial approvers such as a faculty's Business Manager or a unit's director, also route to the IST Client Support Manager for EPIC technical approval.
2. Approve EPIC Purchase Order (PO).
3. Email the IST Service Desk to install and configure device upon arrival.
 - a. Title: "Apple Procurement".
 - b. Attach PCCF.
 - c. Attach PO.
4. Follow standard PC intake/asset management process for documenting assets.
 - a. Create Configuration Item (CI) in Cherwell.

3.1.3 IST Client Support

1. Receive Cherwell ticket. Put status "on hold, waiting on vendor" to wait for delivery.

3.1.4 Client

1. Send approved PO to Simply Computing (via email).

3.1.5 Simply Computing

1. Fulfill PO.
2. Ship orders to the location specified on the PO.

3.1.6 IST Client Support

1. Receive and verify order from Simply Computing (See process 3.2 below for incorrect or bad orders).
2. Schedule install with client.
3. Update Cherwell ticket

4. Update and validate Cherwell Configuration Item.

- 3.1.7 Client

1. Receive configured device.

- 3.1.8 IST Client Support

1. Resolve Cherwell ticket.

3.2 Process: Incorrect/Bad Orders

IST Client Support will review all orders for correctness once they are received from Simply Computing. In the event that a device is incorrectly configured, non-functioning, or in any other way unacceptable, they will return the order to Simply Computing.

INPUT: incorrect/failed/unacceptable system

OUTPUT: Correct System

- 3.2.1 IST Client Support

1. Update the incident details in Cherwell.
2. Re-pack the system.
3. Contact Simply Computing and make arrangements for delivery or pickup (at no charge from Simply Computing)

NOTE: Issues should be escalated to management and ITPC for vendor management.

- 3.2.2 Simply Computing

1. Correct or replace the system in an expedited fashion.
2. Ship orders to the location specified on the PO.

- 3.2.3 IST Client Support

1. Receive the system
2. Continue the process as before.

4 Support

Any support for suspected repair issues or upgrades should be initiated through the IST Service Desk. IST Client Support will be dispatched to assess the device, attempt to resolve the issue, and engage Simply Computing if a repair is required.

4.1 Upgrade

Upgrades are handled similar to the initial consult and purchase process, where a quote is acquired and approved through EPIC. Note that IST does not perform hardware work on Apple products. The client will be able to choose on-site support (for a fee) or to send their equipment off site (see Appendix D).

Details of the upgrade options are defined in the following FAQ document.

Apple Purchase Process - Client FAQ CLEAN 2017-02-10 ver 1.6

4.1.1 Process: Onsite Upgrade

If the client is choosing an onsite upgrade, this on-site fee will be included in the quote as a service as part of purchasing the accessory. If the client decides at a later date that they would like an on-site upgrade, then that will require a separate PO handled through the same process.

INPUT: PO for component and onsite install.

OUTPUT: Upgraded System.

4.1.1.1 Client

1. Send PO to Simply Computing.

4.1.1.2 ITPC

1. Email the IST Service Desk re notification of planned upgrade.
 - a. Title: "Apple Upgrade"
 - b. Attach PO.

4.1.1.3 Simply Computing

2. Acquire component.
3. Schedule time with client to attend on site.
4. Attend on site.
5. Upgrade device.
6. Notify IST Service Desk that the upgrade was completed.

4.1.1.4 IST Client Support

1. Update CI in Cherwell.

4.1.2 Process: Offsite Upgrade

Devices can be shipped to Simply Computing to upgrade. In this case, IST Client Support will coordinate shipping and the appropriate security review to ensure data is contained.

INPUT: PO for component.

OUTPUT: Upgraded System.

4.1.2.1 Client

1. Send PO to Simply Computing.

4.1.2.2 Simply Computing

1. Acquire component.
2. Notify client that the component is now in stock and they can ship their device. Simply computing should instruct the client to call the IST Service Desk (or appropriate Distributed IT).

4.1.2.3 Client

1. Contact IST Service Desk to initiate the shipping process.

4.1.2.4 IST Service Desk

1. Create Cherwell ticket.
2. Dispatch IST Client Support.

4.1.2.5 *IST Client Support*

1. Schedule time with client.
2. Confirm security risk is acceptable as per current Data Security Assessment process.
3. Package and ship device to Simply Computing or coordinate with next on-site pickup by Simply Computing.

4.1.2.6 *Simply Computing*

1. Receive device.
2. Perform upgrade.
3. Ship device to IST Service Desk or return to IST Service Desk in next on-site pickup.

4.1.2.7 *IST Service Desk*

1. Receive device.
2. Dispatch IST Client Support to return device.

4.1.2.8 *IST Client Support*

1. Verify upgrade.
2. Update CI in Cherwell.
3. Schedule time to return device to client.
4. Return device to client.
5. Close Cherwell ticket.

4.1.2.9 *Client*

1. Receive upgraded device.

4.2 Repair Process

The repair process is very similar to the upgrade process. Onsite and off-site options are available for similar fees. The difference is that there may be some iteration regarding quotations and fees. IST Client Support should always attend the device to attempt to correct the issue before we engage Simply Computing. Once IST Client Support has determined that the issue requires vendor intervention they will manage the process of contacting Simply Computing.

The process involves two steps:

1. Determine Costs
2. Perform Repairs

4.2.1 Onsite Repair

Similar to upgrades, the client can determine if they would like onsite repair (for a fee) or to ship their device off-site. If the client would like onsite support, then the consult/purchase process should be used to acquire on-site services from Simply Computing. In this case, Simply Computing would attend the device instead of shipping the device off site.

4.2.2 Process: Repair

This process assumes that the client has contacted the IST Service Desk; IST Client Support has attended and determined that the device requires vendor support. In addition, this assumes that there are costs. If no costs exist (because the device is covered under warranty), the device will be repaired and returned.

INPUT: Device requiring vendor support

OUTPUT: Quote for Repair

4.2.2.1 IST Client Support

1. Review warranty.
2. Contact Simply Computing to arrange for return.
3. Send the device to Simply Computing as per upgrade process.

4.2.2.2 Simply Computing

1. Receive device.
2. Assess device.
3. If the issues are covered under warranty, perform repair and return.
4. If the issues are NOT covered under warranty, provide a quote to IST Client Support.

The next steps in the process assume that there are fees associated with the repair.

4.2.2.3 IST Client Support

1. Receive quote.
2. Discuss quote and options with client.

The rest of the process will proceed similar to the Upgrade processes above (onsite and off-site). NOTE: If the client chooses NOT to repair, then Client Support will arrange for the return of the device to the client as-is.

5 Administration

All administration related to this process and Simply Computing will be handled through the normal vendor relationship process.

Appendix A Delivery Options

If not using complimentary pick-up or delivery services provided by Simply Computing, the University of Manitoba's preferred service provider is Sierra Courier.

IST will package equipment and contact Sierra Courier to make any delivery arrangements on behalf of the client. It is recommended that "non-stop" delivery is selected as the most secure method of transport.

Appendix B - Non-Standard Custom to Order (CTO)

CTO Apple systems are configured differently from the standard Apple systems (e.g. more RAM or larger hard drive). CTO Apple systems are requested when the standard Apple system does not meet the client's computing needs.

Almost any variation on a standard Apple equipment configuration will result in a purchase being classified as a CTO. This can be confirmed by checking the Apple model number on the quotation. Standard orders start with the letters MD or ME, and CTO orders start with the letters Z or ZD.

CTO Systems require extra approval to purchase and there is impact to the client's ability to return the device (see Appendix C below)

Appendix C - Simply Computing's Return Policy

All products that are returned to Simply Computing will be subjected to evaluation to determine condition and resale value. Any damaged or beyond repair devices or accessories can be denied or subjected to a restocking fee dependent on its returned condition.

All Apple branded products that are returned or exchanged that are custom to order (CTO) will be subjected to a 15% restocking fee. Standard built Apple computers can be returned within 30 days at no additional cost.

Appendix D – Apple Equipment Upgrades and Repairs

A Simply Computing technician can come on-site to repair the client's Apple equipment at a charge of \$149.00 per hour. This charge is not covered by IST and is subject to normal PO process and approval.

If the technical issue(s) cannot be resolved onsite, the Simply Computing technician will take the client's Apple equipment to the Simply Computing's outlet to complete the repair work. Note that IST must be involved and the Data Security Assessment process needs to be followed if a device is to be removed offsite.

If the client's Apple equipment is not covered by an extended warranty program and is taken back to the Simply Computing outlet for off-site repair, the customer will be charged a flat rate of \$149.00 for up to 5 hours of service work. Additionally, the client may be charged for replacement parts.

Servicing can take up to 5 business days for repairs. Time frames may vary depending on the issue or if problem cannot be duplicated.

A priority repair service can be offered to the customer at an additional cost of \$49.00, which will expedite the repair to the front of Simply Computing's queue. A priority repair can be completed from 1 to 3 business days depending on the issues.

Simply Computing is authorized to perform AppleCare warranty work.

Loaner Equipment

NOTE: This offering has not been approved. Loaners should not be offered to the client as of yet.

Simply Computing offers loaner computers to customers at an additional cost to the customer:

Loaner rates start at \$50.00 per day, \$150.00 per week and \$350.00 per month.

Loaner charges always apply, even if the customer has AppleCare or SimplyGuard coverage.

Data transfers to the loaner computer and data backups are the responsibility of the customer. If the customer requires technical assistance in this regard, they are instructed to contact the IST Service Desk.

The customer is allowed to make configuration changes to the loaner computer if they wish. If they require technical assistance, they are instructed to contact the IST Service Desk (e.g. e-mail clients or web browsers).

When the loaner computer is returned, Simply Computing securely wipes the internal hard drive so that no residual customer data remains.

Appendix E – Apple Equipment Extended Warranty Plans

The University of Manitoba has two offerings regarding extended warranty coverage for client’s Apple equipment. The first is Apple’s extended warranty plan called AppleCare. The second is SimplyGuard, which is Simply Computing’s extended warranty plan.

Apple’s Extended Warranty Plan – AppleCare and AppleCare+

Every Mac (iMacs, MacBooks, Mac Minis and Mac Pros) and iPad comes with a one-year limited warranty and up to 90 days of complimentary telephone technical support. The client can extend their coverage up to three years for Macs (AppleCare) and 2 years for iPads (AppleCare+) from the original purchase date by procuring the AppleCare or AppleCare+ extended warranty plans. (Refer to the Resources section below for more information.)

Important Note: The AppleCare extended warranty plans can be purchased only while the client’s Mac or iPad is covered under the standard one-year limited warranty.

Simply Computing’s Extended Warranty Plan – SimplyGuard

Simply Computing’s extended warranty plan (SimplyGuard) provides extended parts and labour warranty coverage for Macs and iPads. The client can extend their coverage up to 4 years for both Macs and iPads. (Refer to the Resources section below for more information.)

Important Notes:

- The SimplyGuard extended warranty plan can be purchased only while the client’s Mac or iPad is covered under the standard one-year limited warranty.
- The SimplyGuard extended warranty coverage commences immediately following the expiry of the Apple one-year limited warranty coverage plan.
- The SimplyGuard extended warranty plan does not include software or telephone support.

Candidates for Apple Extended Warranty (AEW) Plans

It is recommended that clients consider purchasing an AEW plan (either AppleCare or Simply Guard) for the following high risk Apple equipment:

Type of Equipment	Examples	Risks
Publicly Deployed Apple Equipment:	Computer labs or kiosks.	Prone to abuse, theft and high utilization rates.
Portable Apple Equipment:	MacBooks or iPads	Mobile equipment is more prone to theft, temperature extremes which can damage internal components/circuitry, and damage due to dropping or knocking of equipment.
High value equipment	Devices over \$2000	Replacement costs are high.

Resources:

AppleCare extended warranty coverage for Macs:

<http://www.apple.com/ca/support/products/mac.html>

AppleCare+ extended warranty coverage for iPads:

<http://www.apple.com/ca/support/products/ipad.html>

SimplyGuard extended warranty plan coverage for Macs and iPads: <http://simply.ca/simply-offers/simplyguard/>

Verifying Apple Extended Warranty Plan Coverage

The IST Service Desk can verify if there is an existing AppleCare or SimplyGuard extended warranty plan associated with a client's Apple equipment by visiting the following URLs (Apple equipment serial number is required):

AppleCare: <https://checkcoverage.apple.com/ca/en/>

SimplyGuard: <http://simply.ca/simply-offers/simplyguard/warranty-status/>

Retain Original Packaging

It is recommended that clients retain their original packaging, as it may be required for product returns or repairs. Clients may be liable for any damage incurred in transit if the device is not returned in original Apple packaging.

It is recommended that clients who do not have original Apple packaging use a sturdy box and adequate protective packing material (i.e. bubble wrap) to safeguard the equipment during transit.

Appendix F – Canadian Foundation for Innovation (CFI) Procurements

Devices purchased through CFI funding may be eligible for discounts below Apple Canada's standard educational pricing model. CFI funded quotation requests should be done through the ITPC who will coordinate pricing from Apple and/or Simply Computing.

IST Client Support will forward the Cherwell ticket to ITPC for quotation. The ITPC requires the following information:

- Model specifics (e.g. CPU, RAM Hard drive)
- Part number(s)
- Quantities
- Extended warranty coverage plan(s)

Note that the U of M recommends that clients purchase an AEW plan for all Apple equipment procured using CFI funding (AppleCare, AppleCare+ or SimplyGuard)

Appendix G – Trade-in of Used Equipment

NOTE: This offering has not been approved. Trade-In should not be offered to the client as of yet.

Simply Computing offers a trade-in program where they will purchase used equipment back. Clients who would like to consider this option should contact the IST Service Desk.

IST Service Desk will ensure the device is properly prepared for decommissioning and send it to Simply Computing for a trade-in quote.