**Institutional Technology Inventory Process/Protocol**

**Ringling College of Art and Design**

**4/5/2013**

**New Equipment:**

We want to make sure all equipment is tagged and information collected BEFORE items are deployed. Goal is to tag and inventory all equipment when it arrives. Equipment should not be deployed until inventoried.

New equipment will be tagged according to the following protocol

* When IT submits a PO request, they will also submit the name of the “Responsible Person”. This is who will be responsible for tagging and inventorying the item if necessary.
* When the Office of Business Affairs (OBA) generates the PO, they will indicate on the PO if the purchase needs to be tagged by the Business Office, and they will notify the “Responsible Person” that the asset needs to be tagged.
* When equipment arrives:
  + If equipment can be unboxed immediately, the OBA inventory representative should be invited to tag the equipment. OBA inventory representative can be present to tag equipment or can decide to hand over the OBA tags to "Responsible Person".
  + If equipment cannot be unboxed, OBA representative will give the tags to the "Responsible Person". "Responsible Person" will assign tags to each piece of equipment and complete the Inventory Spreadsheet. They will also insure that each box has a packing envelop attached which includes the OBA and IT tags for the equipment. When equipment is deployed, IT staff will remove the tag from the packing envelop and place it on the equipment, and update Asset Database with new location, status, client, and responsible team.
* "Responsible Person" will be in charge of creating the “Inventory Spreadsheet” for the new equipment. The template for this spreadsheet will be available on the IT Website (<http://it.ringling.edu/intranet>) under Assets. This spreadsheet will be used to import into the Asset Database. Not all fields of the spreadsheet will be required.
* "Responsible Person" will complete the "Inventory Spreadsheet" and give to Melissa to import into the Asset Database and send to OBA for their Asset Database.

**Annual Inventory Process:**

Once a year, the Office of Business Affairs (OBA) must do a physical inventory as required by Financial Auditors.

* + OBA inventory representatives will perform physical inventory of equipment deployed around campus
    - OBA inventory representatives will have a complete list of building/room combinations which contain IT equipment and will check off locations as they visit them.
    - OBA will visit the locations on the list we provide, and scan the equipment. OBA inventory representative will contact IT Inventory Committee to setup an appointment with appropriate IT staff for access to IT areas.
    - IT will be notified when the scanning process starts and when it is complete. During the scanning phase, IT staff should be aware of any equipment that they move, and should notify the Business Office as they move items around.
    - OBA inventory representatives will document any items they find which are not tagged, and email the IT Inventory Committee. Included in the email should be the location, description, IT Tag (if available), serial number (if accessible) of asset
  + OBA will give IT Inventory committee electronic list of “missing” assets which have not been found during the scanning process, and deadline to locate all “missing” assets. They will also send the list of locations that were visited during the scanning process.

o IT Inventory Committee will track down any “missing” items which were not located and IT will update the location column in the “Missing Items Report”.

o This report will be return to OBA.

o OBA representative will contact IT Inventory Committee if they need assistance in getting access to locations of items identified in the “Missing Items Report”.

* + OBA will provide a separate list of Network/Server room equipment which needs to be located. The IT Inventory Committee will inventory network closets, Goldstein Center Data Center, Bayou Studios Storage, and old Machine Room to locate the items on the Network/Server room list. This Committee will then sign off on the locations of the Network/Server room equipment.

**How to handle RMAs**

Before sending item back:

* + Record the asset information from the old asset.
  + Remove Ringling tags

When new item arrives:

* 1. Get a Business Office and IT tag from Margie.
  2. Enter the new asset in the asset database.
  3. Update the old asset by changing status to "RMA", and enter the return date in the "Disposal Date" field.
  4. Email the business office the following information so they can update their records

Old Item:

Manufacturer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Model: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Description: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

S/N: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

OBA Tag: \_\_\_\_\_\_\_\_\_\_\_\_

IT Tag: \_\_\_\_\_\_\_\_\_\_\_\_

Original Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Replacement Item:

Manufacturer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Model: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Description: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

S/N: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

OBA Tag: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

IT Tag: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

New Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**How to handle the POD**

* + When moving items to the POD, update the Asset Database by setting Status = "Podded", and entering the date into the "Disposal Date" field.
  + Margie will be responsible for filling out the Asset Disposal Form and sending it to the Business Office. Ryan will need to contact Margie when the POD is sent away so Margie knows to complete this tasks. Margie will determine the list of disposed items by pulling a report of Podded items from the database. Melissa and Kris will assist Margie with setting up the parameters for generating the report using the appropriate date range.

**How to handle Sales/Donations**

* + The person selling/donating the equipment should ensure that assets are updated in the database by setting the Status = "Donated/Sold" and enter the date of Donation/Sale in the "Disposal Date" field.
  + Margie will be responsible for filling out the Asset Disposal Form and sending it to the Business Office. Margie will determine the list of Donated/Sold items by pulling a report from the database. Melissa and Kris will assist Margie with setting up the parameters for generating the report using the appropriate date range. The person selling/donating the equipment should work with Margie to complete this form and make sure the list of items is complete.

**Questions:**

* Should network gear be in the asset system?
* Should server room gear be in the asset system?
* Who should do the imports?

**Some information about the Web Help Desk setup:**

* + Locations - currently, we are using what was already available in Web Help Desk for Locations and Rooms. We are working to change this:
  + Status -
    1. Deployed
    2. Donated/Sold
    3. Podded
    4. Parted
    5. OBAFound - See Notes 2013
    6. RMA
    7. Unassigned
    8. Unknown/Missing
  + In Web Help Desk, you can add columns in your view.
  + Which fields are required (\*)/recommended
    1. \* Asset Number
    2. Business Office Tag
    3. \* Asset Type
    4. \* Manufacturer
    5. \* Model - what do we call it
    6. \* Status
    7. \* Serial Number
    8. \* Location
    9. \* Room
    10. Client
    11. \* Purchase Date - acquisition date
    12. Part Number
    13. Mac Address
    14. Responsible Team
  + Exporting

**Storage Rules**

* 1. If it's in a box, label on outside which states
     1. What's in the box
     2. IT and Business office tags of what is in the box
     3. Status of item in the box (New, Used - working, Used - dead)
  2. If it's not in a box then label it with
     1. Status of item (New, used - working, used - dead)
     2. Date it was put in storage
     3. Contact person
  3. Anything found without a label is fair game to use if it's "Common Equipment" (Monitors, cables, UPSs, etc)
  4. Anything found without a label and you want to use, follow up with equipment manager from each team