IT Asset Management
tracking technology assets

"helping IT managers of the world
achieve more™ *success"*

Practical IT Manager *GOLD* Series

IT Asset Management
tracking technology assets

2nd edition

Introduction

Hello and welcome to the **Practical IT Manager GOLD Series**. I'm Mike Sisco, President of MDE Enterprises, Inc. and a career IT manager and CIO of more than 20 years.

Since 2000, I have devoted my life to, *"helping IT managers of the world achieve more success"*. My practical processes and tools are used by thousands of IT managers in every part of the world.

The challenge of managing technology resources has never been more demanding than it is now. Change occurs more rapidly and technology resources are in more demand than ever before.

Mike Sisco, ITBMC

People and companies respond to strong leadership. Effective leadership skills give a technology manager an edge in creating and maintaining a stable business environment. This leads to more success and an IT organization that's valued and appreciated by the business managers of your company.

The material contained in the entire **Practical IT Manager GOLD Series** of books has been developed from my experience in managing technical organizations of all sizes for more than 20 years. The examples are 'real life' experiences of things I know to work, or hard lessons learned from things that did not work. I developed every process and tool you will learn about to help me manage IT organizations during my career. They worked for me and will for you as well.

Two tools I use to enhance the material or to clarify a point are:
Sidebar: a comment or clarification to help make a point
Personal Note: a personal experience or "war story" to reinforce a point.

You will find a bit of humor to make the reading more enjoyable and to emphasize certain points. Because of my very "dry sense of humor", you may have to look for the humor, , , sorry about that. I also hope you like the images I pop in at times to make the reading more interesting.

The *Practical* **IT Manager GOLD Series** includes the following titles:

IT Management-101: fundamentals to *achieve more*™
IT Assessment: the key to IT success
IT Strategy: align your IT vision for business value
IT Organization: right-size your organization for success
IT Project Management: a *practical* approach
IT Staff Motivation and Development: build a world class team
IT Asset Management: tracking technology assets
IT Budgeting: operational and capital budgeting made easy
IT Due Diligence: merger & acquisition discovery process
IT Assimilation: consolidating redundant technologies
What to Look For in a CIO: get more value from your IT investment
, , , plus more titles to come

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Managing IT organizations at a high level is serious business, but having fun along the way is also important. I hope you find the material helpful in your quest and welcome your feedback. You may contact me at mike@mde.net .

Best regards and success,
Mike Sisco, ITBMC
MDE Enterprises, Inc.
www.itmanagerinstitute.com

Additional resources from Mike Sisco
ITLever Blog   www.itlever.com
    Free tips and tools, , , updated frequently

IT Manager Institute   www.itmanagerinstitute.com
    Both classroom and self study versions are available

20 Minute IT Manager   www.20minuteitmanager.com
    Complete library of over 160 e-Learning sessions

IT Asset Management
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I. What is Asset Management?

More importantly, what is "IT asset management"?

__Personal Note:__ When I was a young CIO I ran into my CFO one day in a hallway of our company and he asked me an interesting question. He asked, "Mike, what would it cost to replace our technology?"

I gave him a brilliant answer, , , I said, "I don't know, , , what do you think?"

He wasn't amused. Fortunately, we had a good relationship and he knew I was kidding with him, , , but he had a legitimate reason for asking me his question. You see, he was planning to meet with our insurance people to update our company insurance policy, so he needed to have a general idea of what it would cost to replace our technology in the event of a disaster.

From that point forward I understood the importance for my IT organization to keep track of our company's technology.

The proliferation of technology in most companies creates a significant dependency on technology support to perform well. One of the truly great things in our lives is that technology keeps improving and the cost performance ratio gets better and better.

This trend is likely to continue for a long time to come. If only they could do this with the automobile.

As companies depend more and more on technology for successful operation, the need exists to be able to support a much more diverse technical environment. In the 60's and 70's, a company might have a single computer system with a few users, all directly connected by cable. It was pretty easy to track the technology assets.

Today, a desktop PC has more power than some of the most powerful computer systems of the 1970's. We have all kinds of technologies throughout the enterprise that need to be accounted for, , , from PC's to printers, faxes, cell phones, , , it's a long list.

We live in a great time. With these innovations comes additional responsibility in keeping up with the technology we have in place in our company.

There are a couple of reasons your IT organization needs to be able to quantify the technology in your company:

1. For support - Knowing what you have, where you have it, and the configurations and capabilities of all of these technology components is important to maintain a stable environment.
2. For valuation – Just as with my CFO, your company needs to know how much it will cost to replace the technology for insurance purposes.

As companies rely more on technology, more pressure is placed on the IT organization to maintain a technical environment that is stable and allows employees easy access to those systems.

I define "IT asset management" to be **the organization, tracking, and support of the technology assets of a company**. What this means is the following:

1. *Organizing* the assets by identifying all technology components of the company, their release level, and physical location of each item.
2. *Tracking* all technology components using tools that allow for groupings of assets by location, by type of technology, by cost, etc. to assist management analysis and support.
3. *Supporting* the technology assets by creating change management processes that helps maintain the asset records and making support information readily available when needed.

In a nutshell, asset management is recordkeeping.

One definition point to make is that most IT assets discussed in this publication relate to physical assets. An IT asset should normally be something that is a physical item such as a printer or an item that can be copyrighted as in software.

As we work through the material of this publication, you may identify an asset you want to consider for your company that is not included in these pages. The tools and templates included should provide you with plenty of ideas to develop your own tracking system for any unique asset of your company.

II.   Which Assets Need Managing?

Any technology asset that has value to the company, requires ongoing support, or creates potential risk to the business by lacking the necessary documentation that shows proper ownership or licensure by the company should be tracked.

The first step in managing technology assets of your company is to be able to quantify what you have. You would think this to be a simple thing to do, but it can be difficult and time consuming to get your arms around.

Technology assets require different tracking methods and unique information is needed for different types of assets. An IT asset should have something to do with technology, either the item is a technology piece of equipment or software, , , or it is related to something managed by the IT organization of the company.

I'm going to give you several categories of technology assets you should track. For each one, you need to take a look at the change management processes you have in your company and incorporate the update of these asset records into the appropriate change management process.

Sidebar: An example of this would be in maintaining records for your IT staff. You need to maintain a list of all your IT employees that includes certain information such as current salary, last pay increase, etc.

My Administrative Assistant maintains this asset for me. As the CIO, every new hire, termination, pay increase, etc. that has to do with staff and salary comes across my desk for approval.

I approve the request and give the paperwork to my secretary. She updates our IT Staff List as part of our change management process before sending the paperwork to Human Resources or Payroll.

Anytime I need to get a total asset cost of our asset called IT Staff, I simply retrieve the list (usually a spreadsheet) and total the salaries. When I begin to develop an annual operating budget, we pull this list first to start defining next year's staffing plan. Makes this part of budgeting simple and only a few minutes of work when it could take several hours to retrieve and organize the information.

This publication focuses on the data elements you need to track for each IT asset to stay on top of your business. What's important is "the data you track and how you use the data", , , not necessarily having a robust tool with lots of bells and whistles.

Use a tool that's appropriate for the assets you are tracking and the volumes of the asset. For example, if you have 100 PC's in your company, a spreadsheet will work just fine. However, if there are 10,000 PC's in the company, , , a spreadsheet probably isn't going to work all that great, , , you need a database of some type.

My attitude has always been to keep things simple. If a pencil and paper will do the job **effectively and productively**, , , then use pencil and paper. Don't use something sophisticated just because it is neat, , , use what will help you track the assets effectively and productively, , , end of discussion.

The assets you track do not have to be physical items like servers or printers. One of the categories I recommend you track is information about the projects you work on. Projects are assets and definitely something you want to be able to show is how well you perform in managing projects successfully.

The technology asset categories included in this book are:
- A. Data Center equipment
- B. User equipment
- C. Software licenses
- D. Phones/Fax systems
- E. Telecommunications circuits
- F. Local Area Networks (LAN) equipment
- G. IT staff
- H. Facility floor plans
- I. Vendor contracts
- J. Vendor contact list
- K. IT Initiatives Portfolio

Remember, if you think there is something you need to track that's not in the material, it's easy enough to develop a tracking system for it.

Let's take a closer look at each asset category.

A. Data Center Equipment

All computers and equipment in your Data Center should
be tracked with up to date information on type, model,
purchase date, operating system release level, etc. This
includes:

- Mainframes
- Application servers
- Disk and tape drives
- High speed printers
- Data center equipment (UPS, air conditioning units, etc.)

B. User Equipment

Technology residing in departments of the company, , , I.e.,
user equipment such as:

- Desktop PCs
- Laptops
- Zone and desktop printers
- Scanners
- Copiers

C. Software Licenses

Software license records must be maintained. Software
theft is a significant problem, and inappropriate use of non-
licensed software has major penalties associated with it,
even business continuance risk.

Penalties for non-compliance can be three to four times the
purchase price of the software and include jail time. Good
software license records and communication of a 3rd party
software usage policy can prevent liability problems and
business disruption.

Managing software should include both the software that
your company uses as well as any software your company
licenses to other companies if you develop and sell software.

D. Phone/Fax Systems

Most high growth companies have opportunity to reduce expenses by quantifying their phone lines and getting rid of many that aren't used or needed. This is especially true in a company has grown through acquisition. This category is used for all phone lines and equipment for voice and fax.

There are companies in most major cities that specialize in auditing a company's telecommunications usage (phone, data, fax, phone card, phone services, contracts, etc.). They are paid a percentage of what they save your company. Auditing phone bills is complex, and the telecom carriers don't make it easy. These specialist companies can potentially save your company thousands of dollars.

If you do not have good records and clear understanding of the phone usage throughout your company, I can assure you that you are paying more than you should be.

E. Telecommunication Circuits

This category itemizes telecommunication circuits and dedicated data lines of the company. Getting these assets defined and organized may take some time, especially in a large organization. Once you do, it is going to be much easier to reconcile your telecom costs to insure your company pays for what it needs and is using.

F. LAN Equipment

Companies with several locations often have local area networks (LAN's) in the remote offices. Keeping track of the assets and the configurations that exist will make the job much easier as your company grows and adds additional services for its employees.

Where possible, you should maintain an organized network diagram that has a disciplined change management process in place to keep it current. This is easier said than done. Only the most disciplined IT operations maintain an up to data network diagram. If you do, It can help your people's productivity and their ability to maintain a stable technology environment.
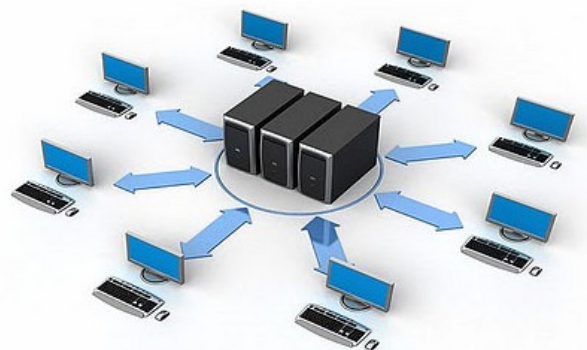
G. IT Staff

Your IT staff is a major asset of the company. To manage this asset effectively, you need to maintain employee information that helps you take proactive action when it comes to employee reviews, raises, etc.

Use your Administrative Assistant to maintain accurate and up to date records concerning your IT staff. It will be an excellent tool when budgeting and planning.

H. Facility Floor Plans

Having access to physical floor plans and network wiring and addressing schemes saves significant time in troubleshooting problems. While a floor plan is not actually a technology asset, it becomes a valuable tool in supporting remote facilities, especially for office moves and changes. This is all that we say about floor plans in this document. The IT Infrastructure organization should have enough documentation to help them support all facilities effectively.
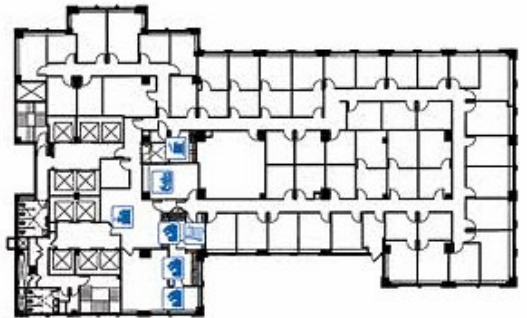
I. Vendor Contracts

Similar to maintaining records on employees, you should keep a list of the vendor contracts you manage. This does several things for you such as:

1. Provides quick access to contract information such as terms, contacts, etc.
2. Assists you during budget time.
3. Helps you anticipate renewal or cancellation provisions.

It will be a source of information that you can refer to quickly concerning contract issues or questions that come up over the course of the year.

J. Vendor Contact List

You can include this information in the Vendor Contract list if you wish, but you might like to have it in a separate document right next to your Employee Contact List. When you need help, you want to be able to get in touch with your vendor quickly, , , and maybe even have the name to escalate to when needed.

Make it a point to get to know the manager of each of your mission critical support vendors. If you need to escalate an issue, it helps when they know who you are.

K.   IT Initiatives Portfolio

Let's spend some time on this one. This tool has probably helped me more than any tool I've ever created and it can do a lot for you as well.

The thing that creates credibility for your IT organization is being able to deliver projects successfully. You simply will not be a credible organization if your projects are late, over budget, or do not meet the client's needs.

Lacking credibility means you will not be a successful IT manager.

So, what this says is that you have to establish credibility. To do this, you need to demonstrate how well you deliver projects for your company and what they are worth.

Let me introduce the **IT Initiatives Portfolio**.

It is a bit hard to see so I'm going to break it down into seven sections and explain exactly what to do with this tool.

A project portfolio can do more to show how strong your organization is than anything I know of. Not only that, it can tell others exactly how good you are in very precise areas:
- Delivering projects on time
- Working within budget
- The value achieved by completing projects
- How often you meet user needs

It's the best way I know to quantifiably demonstrate your organization's track record.

Powerful information to share with others!

Section 1 - IT Initiative and Responsibility - List each project and the assigned person responsible for the project, normally the Project Manager. After completing eight to ten projects, you will start seeing a track record of performance develop.

Over time, you should see your performance improve as you begin focusing on the things that are causing your projects to fail.

	IT Initiative	Responsibility
1		
2		
3		
4		
5		
6		

Section 2 - Timeframe - For each project, insert the planned time you think it will take to complete in weeks or months. When you complete the project, add the amount of time it actually takes and determine the variance. If it is shorter than planned, that's a positive variance, , , longer than planned is a negative variance. In the gray column titled ***On time***, put in a "Yes" for projects you complete on time or faster than expected, , , put in a "No" for projects that take longer than expected.

You want to see lots of "Yes" indicators in the ***On time*** column.

---------- TIMEFRAME ----------			
Planned Time	Actual Time	Variance	On Time

Want to know exactly how good you are in delivering projects on time? Divide the total number of rows that have a "Yes" by the total number of project rows to get a percentage of on time projects. You can even analyze this by project manager to identify who you need to work with in this area if you have a problem.

Section 3 - Budget - For each project, insert the estimated budget to complete the project. When the project is completed, add the actual cost it took to complete the project and calculate a variance between budgeted cost and actual cost. Make anything under budget a positive variance, , , over budget projects have a negative variance. Add a "Yes" to the column titled **Within budget** if the project comes in at or under budget and a "No" if the project exceeds budget. Just as in the Timeframe section, you want to see lots of "Yes" responses in the **Within Budget** column.

| ---------- BUDGET ---------- | | | |
Budgeted Cost	Actual Cost	Variance	Within Budget

Section 4 - Results - You may not use this section on all projects but probably should for larger projects. I like to look at the benefits achieved for a big project at 6-month and maybe 12-month intervals. The results can be depicted in financial terms or in simple non-financial narrative of the benefits.

Put in the forecasted benefits and then update the project with the actual results in the timeframe you choose to measure results for the project. Calculate the variance. Better results than forecasted should be positive variances and poorer results would be negative variances. Hopefully, you see lots of positive variances.

| ------------ RESULTS ------------- | | | | | |
| 6-month Results | | | 12-month Results | | |
Forecast	Actual	Variance	Forecast	Actual	Variance

Section 5 - Meets User Need - This is a simple "Yes" or "No" in the shaded column titled Meets User Need. You get the answer to this from the project sponsor upon completing each project. You want to see all "Yes" responses. If you aren't getting all positives in this area, you need to focus in on the projects to determine what's going on and decide how to improve the situation.

Section 6 - My Rating - This column is used to give the project an overall rating. You can do this in one of two ways:
  A. Very literal - If the project is viewed successful in every category (On time, Within budget, Meets forecasted benefits, and Meets user need), it is a Success. If it fails in any category, it is Unsuccessful or Fail.
  B. Subjective - A large project may finish a week or two late but costs less than the planned budget , exceeds the forecasted benefits, and meets user need. The client might view the project as a tremendous success. In a literal view the project would be deemed Unsuccessful. A subjective interpretation might consider the project a Big Success. If you use this method of interpreting project success or failure, be sure the client would agree on the label you give the project.
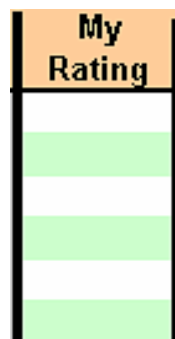
Section 7 - Comments - Use this to comment on a project or to provide additional information.

Capture this information on the projects your team works on and it will give you a clear picture about how good or how bad your IT organization is performing, , , and in very specific areas that your client will understand.

It's not only important to show your success rates in terms of "on time", "within budget", etc. it is also important to tell your client the value your organization is helping the company achieve. If you don't tell them, they won't know, , , GUARANTEED.

This tool can do a lot for you so I highly recommend you maintain an IT Initiatives Portfolio and share the information about the project assets you work on with employees and your clients.

III. Define the Information to Track

Now that you know the technology categories to track, we can define the data you might need for each asset type. The data included in the pages that follow are the data elements that I have found to be helpful to manage an IT organization.

You may find certain asset types to be lacking a data element that you want for your specific use. The tracking lists are set up in tables so it's very easy to add or modify any of them to meet your specific needs.

Each asset tracking approach I'll share with you has been fine tuned and modified over the years to help me organize and manage my IT organizations. The real purpose of any asset tracking tool is to make the information readily available to you or your staff so you can provide better technology support services for your company.

For example, a Vendor Contact list isn't a real asset, but if you have ever needed to find the vendor phone number to repair a crashed server or Data Center air conditioning system, , , you know the importance of being able to retrieve the information quickly.

If you have additional assets that you believe need to be tracked, approach defining the data elements you want to maintain in the following manner:
1. Maintain information that is pertinent to the asset and that you might need for IT support.
2. Include information that is needed for vendor support.
3. Include information needed to assess upgrade options when needed.
4. Where possible, maintain location information by the physical location rather than by an employee name since employees tend to move around.
5. Use naming schemes that help identify equipment assets easily for support.
6. Use consistent naming schemes for assets in an asset category.
7. Consider the administrative time so keep it simple.
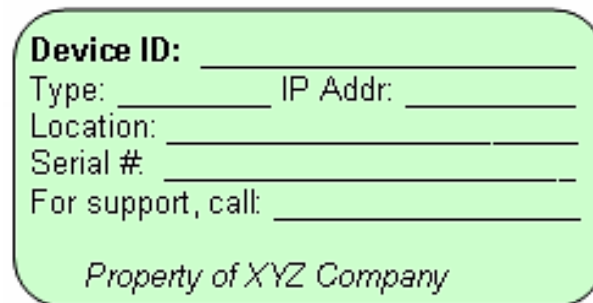
While we are on the subject of naming schemes, put thought into how you name the assets, especially key equipment components. Equipment used by different groups of people can be named so everyone remembers them easily.

When your team supports the technology day to day, it becomes important to refer to a specific server by name so everyone is clear about the device you are talking about. Ambiguity can create problems.

It's a good idea to have your infrastructure team label each major component for identification when troubleshooting problems. You often have to rely on a user to convey the proper information over the phone and anything that helps simplify identification of the asset is a good thing.

Make it easy on yourself and your staff. Use nicely printed labels with bold print that are easy to read and put the label in the same physical location on the equipment so it is easy to get to.

The sample below can be used to label equipment throughout your company to increase your support team's productivity in troubleshooting user problems.

Sample Equipment Label

Remember, if it helps your IT staff fix a problem faster, it also improves the user's productivity, , , the ultimate goal we all strive for. Your technology users will appreciate it and view your team as being organized in what you are doing.

If you are just starting to name and label equipment in your company, you can use the Device ID data element to meet both the IT naming scheme needs as well as company inventory ID needs. Like I said, keep it simple and make it easy on yourself to maintain.

<u>Key Thought:</u>
"Make it easy for your client and your IT team !"

Develop a set of data elements for each technology asset type that you plan to track. When you know what you need, only then should you send out the troops to start collecting the data.

You may also want to consider adding a bar code to the label. With scanning equipment, you can implement an inexpensive bar coding approach to help you take a physical inventory in record time.

Another tool to consider is software that will scan your network and report all the hardware devices connected to the network plus their configurations and any software product loaded onto servers in the network. Report options summarize device and software counts so you can view your network at a high level quickly. Compare this report to your software contracts to determine your software compliance status easily.
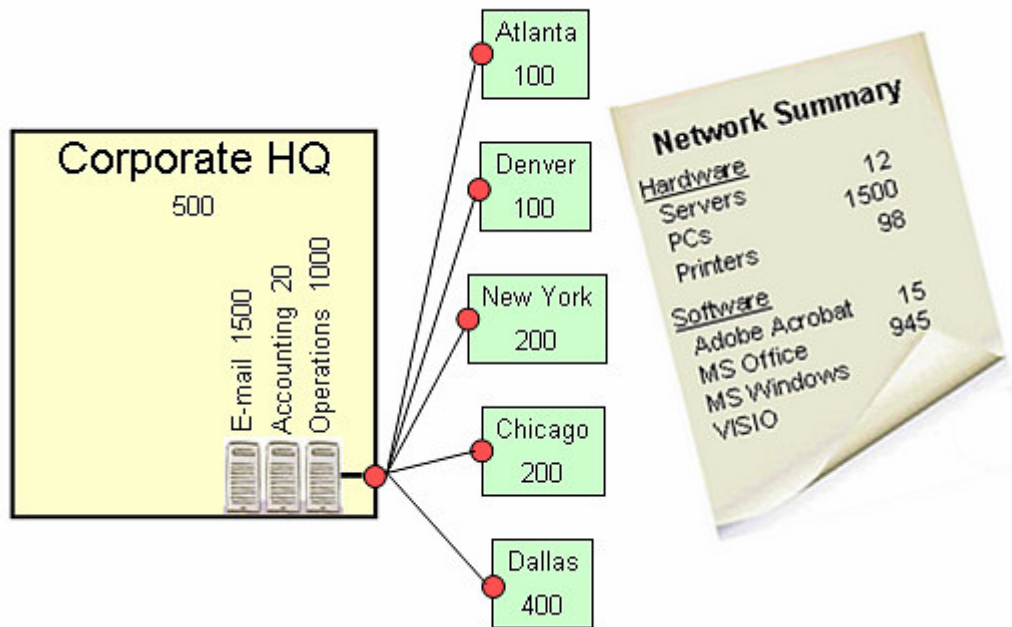
Technology investments quickly run into big money. Keeping track of this investment is important. If you don't, you may find some of your equipment "walking out the door". I know this is something we don't like to talk about, but it does happen. Maintaining accurate records of the equipment and location will help deter theft.

IV. Gather the Data

There is no easy way to initially gather the data for the technology assets of your company. There are excellent software tools you can install on your network that will retrieve information from each physical device located on the network as I mentioned, but I don't know of anything that can help you physically label equipment and identify their locations, , , other than just doing it manually.

So, roll up your sleeves and prepare for a real effort.

If you have a large company with thousands of technology devices, I recommend you invest in a relational database asset management system to record the data. Spreadsheets are great for small volumes but not so effective for very large volumes.

In this book, I'll assume you have no automated tools. We will use spreadsheets and tables to discuss *what data to collect* and *how to use the data*. Ultimately, this is the most important thing.

Use the tool you find to be appropriate for your volumes and that includes the reporting features you want to manage your assets.

what data to collect
and
how to use the data

Let's also make an assumption that your company has not maintained organized records of the technology assets in the company. Hopefully, this isn't the case; but it is probably the best place to start.

To collect the data about your company's technology assets, follow a few steps:

1. Break the project into multiple categories similar to the categories listed earlier and target groups of assets like servers, PC's and printers, etc.
2. Define the information you want collected for each asset category. Refer to **Chapter V – IT Asset Management Tools** for assistance.
3. Determine an approach to collect the data.
4. Distribute the assignments and start the data gathering process.
5. Set up your tools to record and report the data you collect.
6. Incorporate into your change management processes the steps needed to maintain your asset records and keep them up to date.

Important: Be sure you do this last step. It's a waste of time to conduct an inventory of all your company's technology assets if you don't plan to keep your information up to date and accurate.

Make the database update of each asset type a byproduct of an appropriate change management process. This way your asset database won't become obsolete the day after you initially create it.

There are a couple of ways to begin physically collecting the data. If you find yourself in a company with no asset records to be found, you can begin organizing your asset management approach by starting today.

Incorporate the following approaches and within a few months you will have most of your technology assets accounted for and positioned to track going forward.

1. Start labeling and recording all new technology equipment and software that is installed from this point forward using the tools in the next chapter.
2. Instruct your desktop support staff to begin labeling and recording equipment that they are called to work on in their daily support routines.
3. When your staff has an opportunity to visit a remote office, have them conduct a physical inventory of all technology assets in the office and label the equipment while they are there.
4. Start your own search and organize pertinent technology information from:
   A. Contract files
   B. Vendor records
   C. Company managers
   D. Key IT staff that have information in their heads (like vendor support)

As you do this it might be helpful to create an organization matrix listing all departments of the company and the asset categories you plan to inventory and track. Check them off as you complete the department inventories.

Company technology assets inventory status						
			--- User Equipment ---			
Location	Server	LAN	PC	Laptop	Printer	Phone Fax
Executive Wing	--	--	X	X	X	X
Accounting Dept.	--	--	X	X	/	/
Billing Dept.	--	--	/	/	/	/
Data Center	X	--	X	X	X	X
IT Dept.	--	X	X	X	X	X
Atlanta Office	--	X	/	/	/	/
Dallas Office	--	/	/	/	/	/
New York Office	--	/	/	/	/	/

Sample organization matrix

The key push on all of this is that you need to pull the information together so your support organization has access to it. Your employees and you will need the information from time to time.

Once you start collecting the data, you need someone responsible to record it and maintain it for you. Assign responsibility to someone on your staff for maintaining the data going forward. It doesn't do a lot of good to make the effort to gather all the data if you don't plan to maintain it.

In fact, if you don't plan to maintain the information, stop here.

You will just waste everyone's time to develop a "snapshot" of what exists today. It will be obsolete next week if you don't put in the change management processes and commit to maintain the information.

Maintaining accurate records of your technology assets requires two things:
1. Someone assigned responsibility
2. Change management process that works and is used

You can assign the record keeping to someone on your staff, your secretary, or take care of it yourself. This is simple to do, but it will be difficult to keep the records up to date without a good change management process that works.

A chapter on **Change Management Processes** will discuss this topic in more detail.

I like to spread the responsibilities among several employees to maintain asset inventory records. Just because one of your people is organized and documents well does not mean this person should do it all. Spread the responsibility around so all your managers learn the importance of tracking their technology assets.

Make your programming manager responsible for software licenses, , , use the infrastructure manager to track the user hardware components, , , your Data Center manager should take the Data Center equipment and servers.

Take vendor contracts and the vendor contact list yourself. Give your secretary the IT staff list to maintain.

Even though you spread the responsibility around, I would recommend you use a central location to keep all the records. Ideally, your secretary is a good place and all managers will have easy access to the records as needed.

Be sure you assign only one person responsible for an asset group. Multiple hands in the pie will create errors and it is hard to have accountability. Each responsibility should have a backup to maintain the records when the primary person is not available.

V. IT Asset Management Tools

There are dozens of tools available to help you organize and track the technology assets of your company. If your company has something, use it. If not, you should define what you want to maintain and develop a process to keep your information updated before you go out to buy a new product.

This document assumes you have no tools.

The tools included in this chapter can be used by anyone and can be maintained entirely manually if necessary. I recommend you use Microsoft EXCEL or a relational database software product to give yourself flexibility in sorting the data and creating reports. Included here are two types of tools:
- Network Diagram
- Data Collection Templates

Each tool included in this publication is available in MDE's **IT Manager ToolKit**. More than 100 tools and templates are included in the ToolKit and they are provided in a format allowing you to use each tool "as is" or modify as needed for specific needs.

The first tool we want to discuss is called a Network Diagram. Many of you reading this book come from the infrastructure side of the IT support business. For this group, I need to warn you, , , the Network diagram I'm about to show you is overly simple.

Some of you may even thing I'm joking with you when you see it, , , but I'm not.

As a CIO, I need something very simple to discuss our company's technology environment, , , something that's at 50,000 feet. Most of the people I will have discussions with are non-technology executives or other managers or maybe vendors. A simple diagram works for me.

On the other hand, I expect my Infrastructure Manager to maintain a very detailed Network and Systems Diagram, , , one that lists all key components contained in our technology environment. These managers work at a much closer level to sea level and need more information than their CIO usually needs.

Are you ready? Turn the page and you will see the simplest Network Diagram known to man.

A. Network Diagram

Use a network diagram to maintain a graphic representation of your company's systems and network environment. There are many levels of detail you can use. For our purposes here we will stay with a summary level. The closer you work with the network infrastructure, the more detailed the diagram needs to be.

Maintaining an accurate network diagram takes considerable discipline, especially in high growth companies. Changes take place daily and unless you have a strong change management process in place to record the changes, your network diagram will become obsolete about as fast as you put it together.
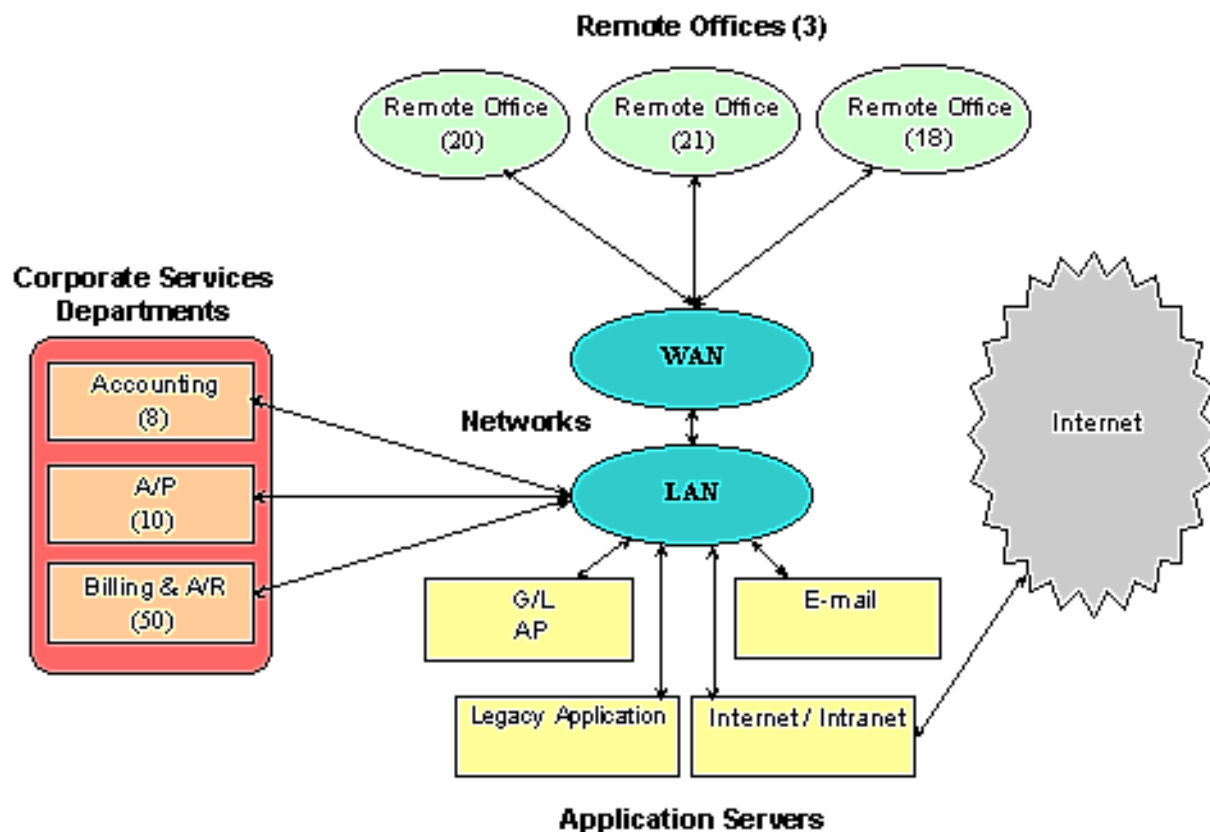
Summary network diagram

The network diagram shown here is very general. The purpose for use here is to lay out the primary components of the company's network in a summary fashion. The tools that follow will provide more detail concerning the individual assets that make up the network and other parts of the technology assets within the company.

A detailed network diagram will include server IP addresses, representations of routers, printers, and other equipment that is part of the network. The infrastructure team should maintain a detailed network plan so they can identify every component in the network.

The tools that follow are data collection templates. Use them "as is" or modify as you wish to collect the information you want to track.

As I mentioned before, it is a straightforward matter to track something you don't see on this list, , , simply identify what it is and define the data you deem important. Determine how to go get the data and then put in a change management process that keeps the information up to date.

The list includes templates to collect data for the following technology groups:
- Servers
- Data Center equipment
- Software licenses
- Phone/Fax/Dial-up modem lines
- WAN circuits
- Vendor support contacts
- IT staff
- Vendor contracts
- Desktops, laptops, local peripherals
- External software license agreements

For each asset group, we provide a table with the data elements and a brief description of each data item.

Servers

Server ID	Vendor Model	IP Addr.	Serial #	O/S Level	CPU, Memory, Disk	User Capacity	Install Date	Location

Data Center Equipment

Equipment Type	Vendor Model	Device ID	Serial #	Capacity	Install Date	Location	Support Vendor	Comments

Software Licenses

SW	Vendor	# Users	Date Purchased	License #	Description	Terms	CPU ID	Support

Phone / Fax / Dial-up Modem Lines

Line #	Location	Telco	Install Date	Voice Fax Modem	Phone System, Fax, Modem Model & Capacity	Equipment Serial #	Vendor Support

WAN Circuits

Circuit ID	Location	B/W	Monthly Cost	Telco	Router Model	Serial #	Install Date	Comments

Vendor Support Contacts

Vendor	Phone	Contact Name	Manager Name	Mgr. Phone	Services Provided	Contract Terms

IT Staff

Name	Org.	Location	Resp.	Start Date	Salary	Bonus	Date of Last Increase & %	Review Date & Rating	Status

Vendor Contracts

Item	HW/SW/ Other	Annual Cost	Terms	Cancel Terms	Anniversary Date	Vendor	Contact	Comments

Desktops, Laptops, Local Peripherals

Item D/L/P/O	Vendor Model	Serial #	Device ID	Location	Date Purchased	Network IP Addr.	O/S Rel.	Comments

External Client Software Licenses

Item	Ser. # or ContractID	Purchase Date	Release Level	HW Platform	# Users	Terms	Annual Maint. $$	Comments

B. Servers

Servers include mainframes, application servers, communication servers, e-mail servers, and any computer supporting multiple users for an application. You should maintain information that helps you identify the equipment for support and high level configuration information. The following table can be used as a guide.

Servers								
Server ID	Vendor Model	IP Addr.	Serial #	O/S Level	CPU,Memory,Disk	User Capacity	Install Date	Location

Data Fields:

Server ID	IT defined ID
Vendor Model	Vendor model
IP Addr.	IP address that the network uses to recognize the device
Serial #	The vendor equipment serial number
O/S Level	Operating system and release level
CPU,Memory,Disk	CPU speed in megahertz (Mhz)
	Main RAM Memory in megabytes(MB) or gigabytes(GB)
	Disk capacity in megabytes (MB) or gigabytes (GB)
User Capacity	The number of users the server will realistically support
Install Date	Date the server was installed
Location	Physical location of the server

Sort Comments:

Depending upon the number of servers, you may need to sort the table by:

1. Vendor Model - to review equipment supported by vendor.
2. CPU, Memory, Disk - sorting by the CPU speed may help you identify older servers. You can separate disk and memory into separate fields if you believe you may want to look at your servers in this way.
3. O/S Level - operating system can indicate specific support groups
4. Install date - tells you the age of the server
5. Location - identifies the servers by location

Data Source: IT Infrastructure Organization

Note: You may want to add columns for upgrade cost or replacement cost. It is handy for budgeting purposes to know what the incremental cost will be when you reach a point an upgrade is necessary. This is more true for mid-size or mainframe computer systems than for smaller network servers because of the differences in upgrade costs.

C. Data Center Equipment (non-CPU)

Non-CPU equipment located in the computer center is tracked here. This includes external disk drives, printers, tape drives, UPS, special air conditioning units, etc.

Data Center Equipment								
Equipment Type	Vendor Model	Device ID	Serial #	Capacity	Install Date	Location	Support Vendor	Comments

Data Fields:

Equipment Type	Equipment type (use your own naming scheme)
Vendor Model	Vendor name and model
Device ID	IT department's assigned Device ID
Serial #	Vendor's serial number
Capacity	Capacity of the device
Install Date	Installation date
Location	Physical location of the device
Support Vendor	Support vendor
Comments	Comments

Sort Comments:

You may need to sort the table by:
1. Equipment type - to group like components together to see what you have
2. Vendor Model - helps you quantify vendor equipment for support needs
3. Install Date - provides a relative age of the device
4. Location - allows you to group equipment by location
5. Support Vendor - lets you see all the equipment supported by a vendor

Data Source: IT Infrastructure Organization
　　　　　　　　Data Center Operations Organization

Note: If you are interested in identifying the replacement cost, add a field to capture it.

D. Software Licenses

All software licenses should be maintained in a filing system that can substantiate you have purchased the license and are in compliance in your use of licensed software throughout your company. IT can maintain a central log book or you can have each facility manager maintain one for their physical location. It is more reliable to maintain a central log.

In addition to maintaining records of software license purchases, you should also develop and communicate a software usage policy throughout the company. Non-compliant use of software by employees without a software usage policy in place can create liability for the managers of the company. A sample software usage policy is included in Chapter VII.

Software Licenses								
SW	Vendor	# Users	Date Purchased	License #	Description	Terms	CPU ID	Support

Data Fields:
SW	Software title
Vendor	Software vendor
# Users	Number of concurrent users or licenses purchased
Date Purchased	Date the license was purchased
License #	Software license number
Description	Software description
Terms	Terms of use, renewal, etc.
CPU ID	The specific CPU the software resides on
Support	Support vendor, contact, and phone number

Sort Comments:
      You may need to sort the table by:
1. SW - software name to group like software products together
2. Vendor - to group all software products from the same vendor together
3. Date purchased - to provide a history of purchases

Data Source: IT Infrastructure Organization
              IT Managers

For large, multi-user software licenses, you may want to add a column to provide an estimate of the cost for the next level of upgrade. As you begin to reach the maximum user limits of such a license, it is handy to know what the upgrade costs are going to be for budgeting purposes.

E. Phone / Fax / Dial-up Modem Lines

It was mentioned earlier that if your organization does not have a good handle on the telecommunications usage and services provided to your company, you are most likely paying too much. This table is intended to identify all the voice, fax, and dial-up modem lines that exist in the company. Wide area network circuits or dedicated data lines are not included in this table; they are tracked separately.

Two types of asset items are recorded in this table. The phone lines are the key and the equipment connected to each line is also included. With this table, you can easily track all the telephone connections into your company.

Phone / Fax / Dial-up Modem Lines							
Line #	Location	Telco	Install Date	Voice Fax Modem	Phone System, Fax, Modem Model & Capacity	Equipment Serial #	Vendor Support

Data Fields:

Line #	Telephone line ID number
Location	Physical location of the line (office, department, etc.)
Telco	Telephone company name
Install Date	Installation date of the line
Voice/Fax/Modem	Voice, fax, or dial-up modem line (V, F, or M)
Model & Capacity	Phone system model and capacity
	Fax model and capacity/speed
	Modem capacity/speed
Equipment Serial #	Serial number of a device connected to the phone line
Vendor Support	Vendor name, contact, and phone number

Sort Comments:
> You may need to sort the table by:
> 1. Line # - for easy retrieval of a specific phone line
> 2. Location - to group all lines by location
> 3. Telco - to help you manage billing from a specific telephone company
> 4. Voice/Fax/Modem - to group like devices together
> 5. Vendor Support - to group equipment by support vendor

Data Source: IT Infrastructure Organization
> Facility and Department Managers

F. WAN Circuits

Maintaining a current list of the WAN circuits will help you reconcile your telecom carrier's invoice each month. In a dynamic environment that changes a lot, this becomes very important. If you aren't staying on top of these charges, you are almost always being overcharged.

WAN Circuits								
Circuit ID	**Location**	**B/W**	**Monthly Cost**	**Telco**	**Router Model**	**Serial #**	**Install Date**	**Comments**

Data Fields:

Circuit ID	Telco circuit ID
Location	Physical location of the circuit (office)
B/W	Bandwidth
Monthly Cost	Monthly support cost (data, monitoring service, etc.)
Telco	Local telephone company
Router Model	Router vendor and model
Serial #	Router serial number
Install Date	Installation date of the circuit
Comments	Comments

Sort Comments:

You may need to sort the table by:
1. Circuit ID - for easy lookup
2. Location - to group circuits by location, state, region, etc.
3. B/W - to analyze low speed or high speed bandwidth usage and need
4. Telco - to identify all circuits supported by each local telco organization
5. Router model - to identify future upgrade needs
6. Install date - to help you reconcile your carrier invoices

Data Source: IT Infrastructure Organization

G. Vendor Support Contact List

Keeping records available of vendor support contacts is helpful since you never know when you are going to have the "opportunity" to call someone in for help.

Vendor Support Contacts						
Vendor	Phone	Contact Name	Manager Name	Mgr. Phone	Services Provided	Contract Terms

Data Fields:

      Vendor   Vendor name
      Phone   Phone number
      Contact Name   Primary contact name
      Manager Name   Vendor manager's name when escalation is needed
      Mgr. Phone   Vendor manager's phone number
      Services Provided   Services provided
      Contract Terms   Contract terms (include special billing terms)

Sort Comments:

      You may need to sort the table by:
      1. Vendor - for easy lookup

Data Source: IT Infrastructure Organization
                     All IT Managers

H. IT Staff

This table will help you manage salary and performance plan and review timing of your IT staff. It also helps you have a great start in developing your annual budget, especially since employee compensation tends to be a large part of the IT department's budget.

IT Staff									
Name	Org.	Location	Resp.	Start Date	Salary	Bonus	Date of Last Increase & %	Review Date & Rating	Status

Data Fields:

Name	Employee name
Org.	IT organization
Location	Physical location the employee works from
Resp.	Responsibility or title (use your own codes)
Start Date	Start date
Salary	Salary
Bonus	Bonus amount (generally quarterly or annual $$$)
Date of Last Increase & %	Date and percentage of last salary increase
Review Date & Rating	Last performance plan review date and rating
Status	Current status (full time–F, part time–P, contract–C)

Sort Comments:

You may need to sort the table by:
1. Name - for easy lookup
2. Org. - to group employees by sub-group organization of the IT department
3. Location - to group employees by physical location
4. Resp. - to group employees by responsibility or title
5. Start Date - to pull a monthly anniversary list
6. Bonus - to help you prepare for bonus check preparation or for budgeting
7. Last increase - to help you prepare for annual increases
8. Review Date - to provide a "tickler" for annual review
9. Status - to group employee types

Data Source: All IT Managers

I. Vendor Contracts

This table is intended to maintain a list of all the vendor contracts your IT department manages in one place. Keeping a list of all the active contracts will help you monitor them and provides a high level view of contract terms and termination guidelines.

Vendor Contracts								
Item	HW/SW/ Other	Annual Cost	Terms	Cancel Terms	Anniversary Date	Vendor	Contact	Comments

Data Fields:

Item	Contract item
HW/SW/Other	Hardware, software or other related services
Annual Cost	Annual contract cost
Terms	Contract terms
Cancel Terms	Cancellation terms (Ex. 60 days before anniversary)
Anniversary Date	Annual anniversary date
Vendor	Vendor name
Contact	Vendor contact
Comments	Comments

Sort Comments:

You may need to sort the table by:
1. HW/SW/Other - to group contracts by type of contract
2. Anniversary date - helps you anticipate renewal or prepare for termination

Data Source: All IT Managers
              IT Infrastructure Organization

J. Desktops PCs, Laptops, and Local Peripherals

This table tracks the user equipment in all company facilities. It is a valuable tool to provide to your infrastructure support staff when you need to troubleshoot issues or to confirm the existence of equipment for department or office moves, changes, etc.

Desktops, Laptops, Local Peripherals								
Item D/L/P/O	Vendor Model	Serial #	Device ID	Location	Date Purchased	Network IP Addr.	O/S Rel.	Comments

Data Fields:

Item D/L/P/O	Item (D-Desktop PC, L-Laptop, P-Printer, O-Other)
Vendor Model	Vendor name and model
Serial #	Device serial number
Device ID	IT department's Device ID
Location	Physical location of the device
Date Purchased	Date purchased
Network IP Addr.	IP address that the network recognizes the device
O/S Rel.	Operating system release level
Comments	Comments (For laptops and other assigned equipment, you may want to include employee name)

Sort Comments:

You may need to sort the table by:

1. Item - the code D,L,P,O allows you to group all like equipment together
2. Vendor model - allows you to get an inventory of all items of a certain model
3. Location - lets you see what is installed in each facility
4. Date purchased - gives you the age of the equipment
5. O/S Rel. - will help you assess costs for upgrading operating system levels

Data Source: IT Infrastructure Organization
Human Resources
All company department managers

Note: Some of these assets are more prone to theft. You may want to consider including employee names for each item or to develop a technology inventory report by employee for easy reference.

K. External Client Software Licenses

If your organization or company sells or licenses software to external clients, you will want to maintain records of your client's purchases. Support depends upon contract terms, release level of software the client is using, and many other factors. Maintaining an up to date client log with a few data elements will help you monitor and manage your clients.

Personal Note: I maintain a detailed log of all clients who purchase publications or tools from each of MDE's product lines. It helps to know what is selling and have ability to offer additional products and services to those who order your products.

My client list includes contact information, date of purchase, and a detailed list of every item the client has purchased. It has been a great support tool for me as well.

External Client Software Licenses								
Item	Ser. # or ContractID	Purchase Date	Release Level	HW Platform	# Users	Terms	Annual Maint. $$	Comments

Data Fields:
    Item   Software title
    Ser.# or ContractID   Serial number or contract ID
    Purchase Date   Date of purchase / anniversary date
    Release Level   Current software release level
    HW Platform   Hardware platform
    # Users   Number of licensed users
    Terms   Key terms of the contract
    Annual Maint. $$ Annual maintenance/support costs (revenue)
    Comments   Other comments

Sort Comments:
1. Item - sort by item to determine all clients that have a certain product
2. Purchase Date - helps you review upcoming renewals
3. Release Level - helps the support team as well as notifying clients of upgrade needs
4. HW Platform - identifies platforms that will not support new releases of the software
5. Annual Maint.$$ - assists in forecasting maintenance revenue and budgeting

Data Source: Sales Department
                    IT Manager responsible for software sales or professional services

VI. Change Management Processes

Implementing change management processes will be important to maintain accurate records of the technology assets in your company. You certainly do not want to go through all the effort to gather and collect all the data and then forget about maintaining it. You will be back to where you started very quickly.

The key area to place emphasis on maintaining the records and in creating change management processes is in your IT Infrastructure organization. This group is deploying and touching the vast majority of the technology equipment in the company.

The Infrastructure Support staff is also the group that will tend to need the information the most outside of the managers who are responsible for supporting the technologies of the company.

The CIO and any manager who develops an annual IT operating budget will also benefit by having many of the tools provided in this publication. For example, an up to date WAN Circuit list tells you how much your monthly WAN circuit costs are.

The Software License log and the Vendor Contracts log will help you anticipate additional increases or annual expenses to renew the services.

Even the External Client Software License log will help you forecast revenue from software upgrades and maintenance renewals for external clients if you have them.

There are many sources of data you will need to coordinate with to maintain all the records we have presented in this document. They include the external client sales group if you sell software, all company departments using technology that you support, and especially your IT infrastructure team.

Data sources were identified in the description of each data collection template in the previous chapter. This may vary depending upon your company, but the insight provided should help you develop your approach as needed.

There are no hard and fast rules here. To maintain accurate records of the company's assets, you must obtain the new data somehow and record it.

Sounds easy, doesn't it?

Maintaining up to date and accurate asset records requires **discipline, perseverance, and focus**. It will not happen just because you want it to happen. Make someone responsible for each asset type and hold them accountable, , , and inspect from time to time to see that the records are being maintained.

If you do not inspect this process, , , expect the records are not being maintained.

You can develop a paper form, add an input form to your company intranet application, set up a standard e-mail message, or take any number of approaches to create a process to facilitate getting the information you need to maintain accurate records.

The reality is that it is very hard to enforce, especially outside of your IT organization. Anything you can do to make collecting the information a byproduct of another process already in place in your company will increase the odds of you getting the information.

An example of this is that every employee change (add, change, or delete) usually requires a department manager to make the Human Resources department aware to get the employee paid or to stop payment. By tapping into this process that already exists you can get the information you need to maintain the IT Staff list, a User Equipment List, etc.

It is usually easier to use an existing change management process than to create a new process just to capture the data you seek.

The data collection templates that require input from within the IT organization will be easier to implement, , , you have more control within your own organization. Focus heavily on processes requiring information from non-IT departments of the company.

The form below is a sample I've used to help my infrastructure team respond to department managers as they have staffing changes. When we receive this form, it served as a work order for the infrastructure team and is logged into our Help Desk Request Log.

Employee Equipment Change Request

_____ Add   Requested by: _____
_____ Change   Request Date: _____
_____ Delete

Employee Name: _____ Department: _____
Effective Date: _____ Physical Location: _____

Approval Signature: _____

Equipment Needs:
_____ PC
_____ Laptop
_____ Desktop printer
_____ Modem Line
_____ Fax
_____ Pager
_____ Desktop printer
_____ Phone
_____ Cell phone
_____ Other (describe)
_____
_____

Primary Network Printer _____

Services Needed:

_____ AS/400 (Billing,A/R)
_____ AS/400 (Acct.)
_____ E-mail account
_____ Internet access

Other Services Needed:
___ _____
_____
_____
_____

Software Needs:
___ VISIO
___ MS Office
___ Other

Other Assistance Needed: _____
_____
_____
_____
_____
_____

Another change management process I've mentioned is how my secretary and I maintain my IT organization's IT staff records up to date. Being able to pull this out to use when I start our budgeting process every year makes the staff planning part go very fast, , , minutes versus hours.

You can maintain this list yourself (very simple to do) or have your secretary keep it for you. **Caution**, , , if you use someone else to maintain salary records, be sure they will keep the information confidential. This is not the type of information that needs to be shared with staff.

Here is how we maintain the IT Staff records:
      A. We define the data we want to track
      B. My secretary and I develop a spreadsheet to track the IT staff data
      C. My secretary collects the data for existing employees and updates the spreadsheet
      D. We define a change management process to keep the data up to date

Any employee change request (add a new employee, terminate an employee, create a salary increase, change of title, etc.) has to be approved by me before we send it to the Human Resources Department to implement.

I review and approve all IT manager requests regarding IT staff and give the approved paperwork to my Secretary.

My secretary updates the IT Staff template and forwards the paperwork to the Human Resources Department. This keeps our records current and up to date.

The material presented so far should give you a quick start in organizing your company's technology asset records. Creating a truly organized environment will save time and help you troubleshoot issues more productively.

There are other things to do in order to organize your technology environment to help you maximize the productivity of your support staff. Some of these are very basic, but you might be surprised at how many organizations don't pay attention to the detail.

A list of things you can do to help you manage your IT assets include:
- Tag and label your cable connections
- Label facility wall outlets for phone, data, and fax.
- Use a standard naming scheme for everything you do including:
    - IP addresses
    - UserID's
        - E-mail
        - Network connectivity
        - Server access and business applications access
    - Phone ID's
    - Equipment ID and/or inventory identification
    - Facility department ID
    - External client ID
- Use memorable names for your servers, production printers and faxes. We acquired a company who used the Seven Dwarf names (Doc, Sneezy, Sleepy, Grumpy, Bashful, Happy, and Dopey) for their major application servers. It's perfectly acceptable to have some fun and we always knew "Sneezy" was the server with issues.
- Data is an asset of the company, normally worth more than all the other technology assets in the company. Insure you have excellent backup procedures and maintain off-site backup copies for recovery.
- Insure your computer room and other areas of the company with large concentration of expensive computer equipment have fire extinguishers readily available and are tested annually.
- Develop and implement standard shutdown procedures for main components of your infrastructure during electrical storms, etc.
- Develop a disaster recovery plan. You can't prevent the flood, tornado, or hurricane but you can control the time it takes to recover. It boils down to how much you are willing to pay for reliable systems recovery "insurance".
- Your company should have insurance riders to cover expensive equipment.

VII. Software Usage Policy

This section is included because of the importance of maintaining compliance in the use of software. The penalties are severe and can even include jail time for major offenders.

In an earlier chapter we focused on the data you need to track for the software titles your company uses. Managers of the company can still be held liable for non-compliant use of software by users in the company, even if the manager does not know about it.

You might ask, **"How is this possible?"**

Well, it is possible; but your exposure can be minimized or completely avoided by creating and enforcing a sound Third Party Software Usage Policy. When an employee has been told what is proper and what is not, it pushes the liability to the individual who chooses to conduct themselves inappropriately.

A Software Usage Policy needs to incorporate the following elements:
- Standard software applications and products of the company
- Guidelines for third party software usage
- Expectation that all software is expected to have an appropriate license

You can use the following document as a beginning point in developing your own policy.

Company Software Usage Policy

To: All Employees
Revision Date: _____

Our company believes in and operates in a manner that respects the development rights of other companies for software, publications, and other copyright or trademarked items. It is our intent to maintain the highest level of compliance in the use of software within our company to:

     A. Protect our company's technology business environment by using standard products
     B. Maintain licensed compliance in the use of all software products on all computers in the company.
     C. Enhance the supportability of the technology infrastructure

Standards: Our company uses the following licensed software applications as standards throughout the company:

_____   _____   _____

_____   _____   _____

_____   _____   _____

Use of "external" software products: Additional software products outside the standard list above may be used by individuals or departments within the company once approved by the software review committee. This review is in place to ensure compatibility of the application within the company's infrastructure, to review for an appropriate solution to meet the need being addressed, to screen for virus, to verify license compliance, and to maintain the reliability of our systems capability. Violations of adhering to this policy may result in disciplinary action due to the potential damage and/or productivity loss to our business.

Compliance: Our company expects all employees to maintain the highest ethical approach in the use of software and company equipment. Notification of violations should be sent to our Chief Information Officer (CIO). We all must take steps to protect the integrity of our systems to maintain the highest level of reliability possible.

Questions: Send questions or comments to our CIO.

Thank you for adherence to this important company policy.

Mike Sisco

Mike Sisco, President & CEO
MDE Enterprises, Inc.

VIII. Summary

It's important for your IT organization to maintain up to date and accurate records of the technology assets in your company. These records are necessary for determining insurance plans needed for your company and they can be very helpful in assisting your IT support team in their jobs.

To maintain accurate records of the technology is not complex but it does require some thought and discipline. Follow a few simple steps to make it happen in your company:
- A. Determine what you want to track
- B. Assign responsibility for each asset group (one person per asset group)
- C. Define what you want to track in each asset category
- D. Decide how you want to collect the data of existing asset inventories
- E. Develop a change management process to keep the data up to date
- F. Hold your asset manager(s) accountable
- G. Inspect the process from time to time

Use the simple templates contained within this document and customize them as needed to meet your specific needs. Develop new templates as you determine is needed for your situation.

Try to incorporate steps to update your records in change management processes that already exist rather than developing separate processes, , , it will be easier to implement and have a higher success rate.

Teach your young managers and leaders in your organization the importance of maintaining accurate records of the technology assets in your company. Help them understand the benefits your company receives in doing this and they are more likely to embrace what you want.

Achieve more

Appendix

A. Server Template

Servers								
Server ID	Vendor Model	IP Addr.	Serial #	O/S Level	CPU,Memory,Disk	User Capacity	Install Date	Location

Appendix
B. Data Center Equipment (non-CPU) Template

Data Center Equipment								
Equipment Type	Vendor Model	Device ID	Serial #	Capacity	Install Date	Location	Support Vendor	Comments

Appendix
C. Software License Template

Software Licenses								
SW	Vendor	# Users	Date Purchased	License #	Description	Terms	CPU ID	Support

Appendix
D. Phone / Fax / Dial-up Modem Line Template

Phone / Fax / Dial-up Modem Lines							
Line #	Location	Telco	Install Date	Voice Fax Modem	Phone System, Fax, Modem Model & Capacity	Equipment Serial #	Vendor Support

Appendix
E. WAN Circuit Template

WAN Circuits								
Circuit ID	Location	B/W	Monthly Cost	Telco	Router Model	Serial #	Install Date	Comments

Appendix
F. Vendor Support Contacts Template

Vendor	Phone	Contact Name	Manager Name	Mgr. Phone	Services Provided	Contract Terms

Appendix
G. IT Staff Template

IT Staff									
Name	**Org.**	**Location**	**Resp.**	**Start Date**	**Salary**	**Bonus**	**Date of Last Increase & %**	**Review Date & Rating**	**Status**

Appendix
H. Vendor Contract Template

Vendor Contracts								
Item	HW/SW/ Other	Annual Cost	Terms	Cancel Terms	Anniversary Date	Vendor	Contact	Comments

Appendix
I. Desktop PC, Laptop, and Local Peripheral Template

Desktops, Laptops, Local Peripherals								
Item D/L/P/O	Vendor Model	Serial #	Device ID	Location	Date Purchased	Network IP Addr.	O/S Rel.	Comments

Appendix
J. External Client Software License Template

External Client Software Licenses								
Item	**Ser. # or ContractID**	**Purchase Date**	**Release Level**	**HW Platform**	**# Users**	**Terms**	**Annual Maint. $$**	**Comments**

Notes

The **Practical IT Manager GOLD Series** of books and tools will help you manage your IT organization better. The processes and tools discussed in these publications are used by thousands of IT managers around the world to **achieve more success**.

The series includes the following titles and more:
  - **IT Management-101**: fundamentals to *achieve more*™
  - **IT Assessment**: the key to IT success
  - **IT Strategy**: align your IT vision for business value
  - **IT Project Management**: a *practical* approach
  - **IT Asset Management**: tracking technology assets
  - **IT Organization**: right-size your organization for success
  - **IT Staff Motivation and Development**: build a world class team
  - **IT Budgeting**: operational and capital budgeting made easy
  - **IT Due Diligence**: merger & acquisition discovery process
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