

ITAM discussion - Shared notes
12-15-2021

Attendees (bold - panelist and future event planners)

Chrissy Kenny - UNCW

Dan Herrick - University of Colorado Boulder - IT Asset Manager

Charlie Carwile - Product Manager - TeamDynamix

Albert Bina -

Kenneth Tubaugh - IT Asset Coordinator

Matt Powell -

Jerilyn Prescott - U of Idaho

Andrew Lyons - University at Albany

Lisle (pronounced Lyle) Waldron - U of Trinidad and Tobago

Lucas Friedrichsen - Oregon State University - ITSM Product Manager

Huma Hack - IT Asset Manager (Software Licensing)

Tami Mansur - UNCW

Tony Ronca - UNCW

Kevin Eck - UNCW

Kayla O'Daniel - The New School - Senior Director of Customer Experience

Danny Arroyo - The New School

Vernon Yoshida - U of Hawaii

Nate Burt - Middlebury

Mitch Pautz (mpautz@usc.edu) - U of Southern California

Angela Buesing - Marquette University - Director IT Support

John Mohammad - Marquette University - Computer Replacement Program Lead

Andrew Arroyo - Marquette University - Technical Support Specialist - Computer Build Lead

Michael Martin -

Blair Sawler - Technical Operations Manager, University of New Brunswick

Felix Niculescu - The New School

Brittnay Hernandez -

Edward Gray (egray@umw.edu) - Co-Manager of IT Support Services, University of Mary Washington

Karl Owens - University of Oregon

Steve Lehman - University of Oklahoma

Joyce Schwartz - University of Central Oklahoma

Mack Pauly - Mgr of Managed Devices and Software - Middlebury College

Felix Niculescu - The New School

Loren Frerichs - University of Nebraska

Ray Rodriguez - University of Miami

Jonah Fenn - Oregon State University - IT Consultant/Drupal Instructor

Scott Nemes - San Francisco

Jimmy Young - UCO

Houston Griffith - Virginia Commonwealth University

Mary Ryan - Webster University

Ben Muratovic - The New School

William Morrison - Massasoit Community College

Todd Jensen - todd.jensen@nebraska.edu - Application Support Manager - U Nebraska

Questions from chat. Post your questions here for potential follow up topics to be explored in future events

1. What essential asset info are you all tracking (or wanting to track)?

- Marquette University - Desktop, Laptop, Software, Audio/visual, Teams Calling Devices, Mobile Devices

We want to save and merge financial data with specific hardware specifications, Asset Tag, Serial Number, Manufacturer, Model, PO, Cost, Funding Source, Department/ College, Standard vs. Non-standard, Warranty, End-User, Status, moving and updating large amounts of data vs a manual process (ie mass data import and record field updates)

- Dan Herrick: For hardware: "Essential" procurement info such as PO and Cost, associated service agreements like warranty; "Essential" identification info like serial number, asset tag, and model; hardware specifications; assignment and ownership info.

2. How do you make the decision on whether to track (mouse, chairs, switches

- Dan Herrick: Assets are "anything of value to your org". If the asset has enough value (monetary cost, cost of lack of capability, cost of downtime, etc) you can track it. It's something of a personal decision for each org. F/E, we track computers and monitors but not mice and keyboards. (Part of the logic is cost, part is that mice/kbs tend to be consumables and not re-used, and don't contain data thus no risk of data loss.)

For software, we track *everything*, because the cost of noncompliance can be unrelated to the procurement cost.

For hardware, we are currently tracking computers, tablets, and monitors.

- Marquette - Anything that meets "Fixed Asset" requirements as identified by Finance other items or bulk purchases can be applied.
- Uof Idaho: We decided to start with computers and printers then expand out. We decided not to track mice, keyboards and monitors as the overhead to track those items was not worth it.

3. And are you tracking hardware, software, anything else?

- Jerilyn Prescott: University of Idaho is tracking computers, printers, now adding servers and UPS. In another module we are starting to track software licensing.

4. Where to track assets?

- Danny Arroyo - License tracking - software using a particular license tied to a purchase order

- Jerilyn Prescott: we are using our work management system, TeamDynamix for ITAM
 - Marquette - Cherwell integrated with MECM/ AD.
5. *Integration of Asset Management tools with other systems*
 - Are you integrating information from your endpoint management tools such as MECM/Jamf Pro/Kace?
 - What about hardware/software manufacturers for things like warranties/maintenance agreements?
 6. *Hardware versus Software management, advantage to start with one first?*
 - Regulatory and reporting requirements might push one to the top.
 - For software vs hardware is the same asset management software tool being used?
 - From Dan Herrick to Everyone 12:37 PM
 - i. What we focus on first is likely going to be the biggest needs/pain points of our institutions
 - Software - could be cost recovery related.
 7. *What deliverables would be useful for this group?*
 - Tools used
 - ITAM Roles currently in place. Do you have staff whose primary responsibility is ITAM or is it shared across many areas with a process manager?

Items people are interested in

Security managing HVA (high value assets)

Asset lifecycle management (from cradle to grave)

Manage assets in a remote / hybrid environment

ITAM Governance and Policy

How to get your procurement teams involved in asset governance - also what policies are in place for when staff do not return assets?

Data privacy

Learning

License tracking - software using a particular license tied to a purchase order

Automation

Keep asset info up-to-date (not just initial procurement info)

Ensuring your asset registry is up to date and accurate

Centralized and decentralized tracking - getting buy-in and support

Mature processes and be less ad-hoc

Distinguishing between HAM and SAM

How to start your asset management journey

How to start successfully

How to begin or mature your ITAM process

Configuration Management vs Asset Management (how they relate)

Difference between asset and configuration management and similarities - goals and objectives

Asset management metrics and reporting - KPIs and OKR

Asset management roles and responsibilities

Asset management important attributes

Integrating hardware asset “discovery” into the ITSM tool (end point devices)

- SCCM
- JAMF
- BigFix
- etc

Integrating software asset “discovery” into the ITSM tool

- Marquette - We have just started using LabStats for computers that do not have a primary user or are identified as faculty or staff. This discovers hardware, software and user usage. Great discovery. <https://labstats.com/>

Assignment of asset to users, sync to other systems

Tie systems together

Media assets

Loss prevention - loaners and devices (assets) offsite.

Relationships between assets

Lessons learned from someone that has done this successfully - Panel event

ITAM 101

Tools people are using - SCCM, LanDesk, Microsoft InTune, etc.

+1 for those tools and integration!

on the hardware asset management (HAM) side of things, establishing who manages and how you integrate other systems like your user directory, space management database, endpoint management platforms, financial systems, and other data sources can be a significant driver for automation of processes like ingesting and associating data into an ITAM system

Add CGs and other communities

- ITPSM (IT Procurement and Supplier Management) CG - Purchasing/Sourcing Focused
- HETMA (Higher Education Technology Managers Alliance) - Audio/Visual Focused
- LABMGR List (University of Arkansas) - Lab/Classroom Focused
- IT Support Services CG - Scott Tiner/Andy Miller co-chairs

Panel volunteers (need email addresses)

- Mitch Pautz (co-coordinator)
- Dan Herrick
- Chrissie Kenny
- Angela Buesing - CST
- Edward Gray (if needed)
- Houston Griffith
- Mack Pauly
- Jonathan Graves (backup)
 - AV asset management in TDx

Resources

- ISO standard: ISO/IEC 19770-1:2017 - Information Technology - IT Asset Management: <https://www.iso.org/standard/68531.html>
- IAITAM (BOK, association, certification): <https://iaitam.org/>
- ITAMOrg (BOK, association, certification): <https://itamorg.com/>
- Related ITIL Practice Guides: available through MyITIL subscription:
<https://www.axelos.com/login?returnurl=%2fprofile%2fuser-details>
 - IT Asset Management
 - Service Financial Management (for things like fixed assets, etc.)
- <https://itamaccelerate.learnworlds.com/course/process-kit-walkthrough>
- <https://samcharter.com/whitepapers/>

Chat log

00:05:48 Mitchell Pautz: great turnout!

00:06:32 Friedrichsen, Lucas: A notes file if anyone wants to collaboratively take notes

00:06:33 Friedrichsen, Lucas:
<https://docs.google.com/document/d/1Tq1rgvUIJApRYoBnHiOLuiiVVlrV3LAWe-MQfvdGmiQ/edit>

00:06:49 Mitchell Pautz: Thanks Lucas. Good idea

00:07:02 Dan Herrick: Thanks Lucas!

00:07:25 Mitchell Pautz: Does TDX have an educational focused LIG/SIG?

00:10:36 Dan Herrick: What essential asset info are you all tracking (or wanting to track)?

00:10:43 Friedrichsen, Lucas: The document has been updated to people can edit the notes file. :)

00:11:01 Dan Herrick: And are you tracking hardware, software, anything else?

00:14:18 Dan Herrick: @Kayla O'Daniel: Do you have any ITAM processes tied to onboarding/offboarding?

00:14:18 Jerilyn Prescott: University of Idaho is tracking computers, printers, now adding servers and UPS. In another module we are starting to track software licensing.

00:14:33 Mitchell Pautz: Feel free to drop questions in the shared doc that could be topics for future events

00:14:34 Mitchell Pautz:
<https://docs.google.com/document/d/1Tq1rgvUIJApRYoBnHiOLuiiVVlrV3LAWe-MQfvdGmiQ/edit>

00:16:51 Friedrichsen, Lucas: You are welcome to add your name, organization and job title to the document too.

00:26:20 Mitchell Pautz: there should be a limit of the number of people from an institution :)

00:26:49 Vernon Yoshida (University of Hawaii): I would love to have a few more from our institution! 😊

00:28:16 Mitchell Pautz: good point Vernon

00:34:35 Karl Owens: afk

00:37:50 Jerilyn Prescott: When is the call for Team Dynamix? How can I join it?

00:39:06 Mitchell Pautz: I would also we leave out Configuration Management until the point of intersection with ITAM

00:39:23 Greg: For software vs hardware is the same asset management software tool being used?

00:39:52 Dan Herrick: What we focus on first is likely going to be the biggest needs/pain points of our institutions

00:41:25 Dan Herrick: Keep in mind that "Hardware" is very broad. Laptops/Desktops vs Servers vs A/V equipment, etc.

00:41:32 Friedrichsen, Lucas: What deliverables would be useful for people here?

00:41:39 Mitchell Pautz: <https://docs.google.com/document/d/1Tq1rgvUIJApRYoBnHiOLuiiVVlrV3LAWe-MQfvdGmiQ/edit>

00:42:22 Dan Herrick: IT Support Services CG

00:42:36 Dan Herrick: I'm on both CGs :)

00:43:22 Friedrichsen, Lucas: @houston - can you list those CGs here or in the document you just listed.

00:45:08 Houston Griffith: +1 for the panel discussion (nominating Dan Herrick)

00:45:34 Houston Griffith: @Lucas, I'll add those to the document now

00:46:14 Angela Buesing: This is great!!

00:46:28 Friedrichsen, Lucas: Thanks Houston!

00:47:45 Angela Buesing: I volunteer as a panel member

00:47:51 Mitchell Pautz: survey question I think

00:47:58 Houston Griffith: +1 for those tools and integration!

on the hardware asset management (HAM) side of things, establishing who manages and how you integrate other systems like your user directory, space management database, endpoint management platforms, financial systems, and other data sources can be a significant driver for automation of processes like ingesting and associated data into an ITAM system

00:48:19 Edward Gray - UMW: If needed, I can serve as a panelist

00:48:50 Dan Herrick: I nominate Houston (and not just as reciprocal vengeance) as panelist

00:49:29 Tami Mansur: Mack Pauly said he'd be happy to be on the panel

00:51:58 Blair Sawler: Thanks very much!

00:51:59 Mitchell Pautz: Thank you!

00:52:00 Dan Herrick: Thank you Chrissie for organizing!

00:52:07 Houston Griffith: thank you Chrissie!

