DAS | DEPARTMENT OF ADMINISTRATIVE SERVICES

Statewide Policy
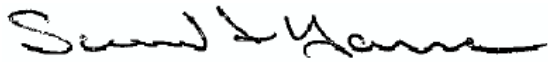
SUBJECT: Information Technology Asset Inventory & Management	**NUMBER:**	107-004-010
DIVISION: Enterprise Information Strategy & Policy Div.	**EFFECTIVE DATE:**	09-08-08

APPROVED: *[signature]*

POLICY/ PURPOSE:

This policy establishes standard methods and timeframes that state agencies will use to manage, collect, and report their information technology (IT) asset information.

Agencies will establish IT Asset Management programs and procedures to track the acquisition, deployment, management, and disposition of all IT assets under their control. Agencies will collect and report information about their IT assets and planned IT investments to the Department of Administrative Services (DAS) Enterprise Information Strategy and Policy Division (EISPD).

AUTHORITY: ORS 184.473-184.477

APPLICABILITY: This policy applies to every Oregon Executive Branch agency, board, or commission, whose costs are paid wholly or in part from funds held in the State Treasury, except the Public Defense Services Commission, the State Board of Higher Education or any state institution of higher education within the Oregon University System, the Secretary of State, the State Treasurer, and the State Lottery.

ATTACHMENTS:
- Attachment 1: Statewide IT Asset Inventory Submission Schedule
- IT Asset Management Glossary *
- IT Asset Inventory – Mandatory Attributes Table *
- IT Asset Inventory Definition Document and Forms *
- Exception Process *
* The resources listed above can be found at:
http://www.oregon.gov/DAS/EISPD/ITIP/ITAM_index.shtml

DEFINITIONS: A glossary of definitions and terms can be found at:
http://www.oregon.gov/DAS/EISPD/ITIP/ITAM_index.shtml

GUIDELINES:

I. Agencies must:
   A. Establish an IT Asset Management (ITAM) program,
   B. Identify an Agency ITAM Coordinator,
   C. Create an IT Asset Inventory, and
   D. Establish IT asset lifecycle replacement plans.

II. Agencies must submit IT asset lifecycle replacement plans along with their biennial agency request budget document.

III. Agencies must actively manage their software licensing agreements.

GUIDELINES
CONT:

Asset Tagging
IV. Agencies must:
  A. Tag all capital and non-capital IT assets with a State of Oregon identification tag and property control number
  B. Add the IT asset to their IT Asset Inventory

V. Agencies that utilize non-DAS asset tags must reference the DAS State Controller's Division agency reference number in addition to the asset tag number in their capital asset property inventory.

Inventory Process
VI. Agencies must inventory all capital and non-capital IT assets at all agency locations, including those IT assets assigned to employees, contractors, and volunteers.

VII. Agencies must:
  A. Maintain an inventory of all IT asset information described in the "Information Technology Asset Inventory - Mandatory Attributes" table, and
  B. Report that IT asset inventory information to DAS EISPD according to the schedule described in Attachment 1, "Statewide IT Asset Inventory Submission Schedule".
  Note: The level of IT asset information detail required for an agency to efficiently and effectively manage its IT operations and assets is expected to exceed the level of detail required by this policy.

VIII. Annually conduct a physical inventory of Capital IT assets, and reconcile that physical inventory with their IT Asset Inventory. Physical inventory of Non-Capital IT assets is also required annually unless agencies are able to conduct an accurate inventory of these assets via automated discovery tools.

IX. Agencies should investigate discrepancies between the physical inventory and their IT Asset Inventory.

Transfer, Exchange, or Disposal of
IT-related Assets

X. Agencies must follow relevant DAS State Controller's Division policies and the DAS – Statewide Policy 107-009-0050 on Sustainable Acquisition and Disposal of Electronic Equipment (E-Waste/Recovery Policy).

PROCEDURES:

Step	Responsible Party	Action

IT Asset Management Program

1. Agency Head
- Establishes an agency IT Asset Management (ITAM) Program and appoints Agency ITAM Coordinator.
- Submits the Agency ITAM Coordinator's name and contact information to DAS EISPD, according to the Attachment 1 submission schedule.

2. Agency ITAM Coordinator
- Collects the agency IT Asset Inventory
- Develops IT asset lifecycle replacement plan.
- Submits IT asset lifecycle replacement plan to DAS EISPD at the same time agency submits biennial agency request budget document(s).

Inventory, Data Collection, Review and Reporting

3. Agency ITAM Coordinator
- Collects, documents, and reports IT Asset Inventory to DAS EISPD, information described in the "Information Technology Asset Inventory - Mandatory Attributes" table according to the Attachment 1 submission schedule.
- Annually conducts physical inventory of Capital IT assets.
- Annually conducts physical or automated inventory of Non-Capital Assets.

4. EISPD Analyst
- Reviews, consolidates, analyzes and publishes annual report on Statewide IT Asset Inventory and Management information.

5. Agency ITAM Coordinator
- Reviews the DAS EISPD Statewide IT Asset Inventory and Management report for accuracy.

Software Licensing and IT Asset Inventory Reporting

6. Agency ITAM Coordinator
- Manages and ensures agency compliance with software licensing agreements.
- Oversees delivery of IT Asset Inventory and IT asset lifecycle replacement plans to DAS EISPD.

DAS EISPD Contact Information
Department of Administrative Services
Enterprise Information Strategy & Policy Division
IT Investment & Planning
4th Floor, Room 470
955 Center Street NE
Salem, OR 97301

Email: IT_Investment.Review@das.state.or.us
Phone: 503-378-8366

IT Asset Management Website: http://www.oregon.gov/DAS/EISPD/ITIP/ITAM_index.shtml