

IT Asset Management

ITAM Coordinator Forum

October 9, 2008

Agenda

- Introductions/welcome
- Overview - Policy requirements and submission schedule
- Policy Exception process
- Agency experiences to date
- Forming an ITAM workgroup
- Question/answer period

Background

- ORS 184.473-184.477 - ORS 184.475 requires
 - Agencies to collect and submit IT asset inventory information to DAS
 - DAS to keep/maintain a continuous inventory of that information
- Statewide ITAM Policy 107-004-010
 - 08/19/2008 - Endorsed by CIO Council
 - 09/05/2008 - Adopted by DAS Director
- Policy, attachments and additional resources
 - IT Asset Management Website:
http://www.oregon.gov/DAS/EISPD/ITIP/ITAM_index.shtml

Policy Overview

■ Core Policy Requirements

- Submit lifecycle replacement plans as part of agency request budget.
- Tag IT assets
 - All capital assets
 - Non-capital assets as they are deployed
- By September 30 - Name an IT Asset Management coordinator and provide DAS EISPD with the name and general contact information for that person
- By October 31 - Collect and submit inventory report per submission schedule
- By October 31 – Along with Inventory report include a statement that the agency is in compliance with software licensing agreements

Submission Schedule

Annual Due Dates	Description of Item (s) Due
<ul style="list-style-type: none"> • September 30th following policy adoption • June 30th each year thereafter 	<p>Each agency will provide DAS EISPD with the name and general contact information of their Agency ITAM Coordinator.</p>
<ul style="list-style-type: none"> • October 31st following policy adoption • July 31st each year thereafter 	<p>Each agency will provide DAS EISPD with a copy of their IT asset inventory report. The report will include an agency confirmation that: 1) all agency capital and non-capital IT assets have been tagged; and 2) that appropriate software licensing agreements for software used by agency employees are in place, and that the agency is in compliance with those agreements.</p>
<ul style="list-style-type: none"> • November 30th following policy adoption • September 30th - each year thereafter 	<p>DAS EISPD will create and provide agencies with an EISPD – Statewide consolidated IT Asset Inventory/Management Report.</p>
<ul style="list-style-type: none"> • December 31st following policy adoption • October 31st - each year thereafter 	<p>Each agency will provide DAS EISPD with feedback on the current Statewide consolidated IT Asset Inventory /Management Report.</p>

Submission Schedule

Flexible Due Dates	Description of Item(s) Due
<ul style="list-style-type: none">• Flexible	As new <u>or</u> updated Agency IT Asset Inventory /Management policies and procedures are created, submit them to DAS EISPD for review and comment.
<ul style="list-style-type: none">• Submission dates are defined by the State Budget Instructions	Develop and submit a Lifecycle replacement plan to DAS EISPD at the same time the agency submits its biennial agency request budget document.

Policy Exceptions

- State (CIO) or their designee may grant an agency a written exception to the ITAM Policy.
- Considerations to be weighed by the State CIO or their designee in evaluating an agency request for an exception to the ITAM Policy are (without limitation):
 - Integrity of the annual IT asset inventory
 - Agency business rationale for seeking exception
 - Cost or resource impact to inventory compared to the benefit gained
 - Other factors deemed relevant by the State CIO or their designee

Exception Process

- Agency submits exception request to designated DAS EISPD recipient via e-mail
 - Email: IT_Investment.Review@das.state.or.us
- Agency e-mail exception request should include:
 - General description of the exception request;
 - Rationale for the request; and
 - Why the exception will not skew the quality of the inventory
- DAS EISPD recipient replies with a receipt of the request. The reply will:
 - Indicate that the agency has submitted the needed information; or
 - Indicate that more information is needed; and
 - Include an expected timeframe for response to the request

Exception Process

- DAS EISPD staff makes recommendation to State CIO or their designee
- Exception request is approved / denied
 - If approved, the request
 - Will be logged as approved
 - Reported as a footnote in the inventory, and an e-mail will be sent notifying the agency of the approval.
 - (NOTE: This is expected to be the result for the vast majority of the requests on the initial inventory).
 - If denied, the request
 - Will be logged as denied and the rationale for denial will be sent to the agency with a request for remediation within a specific period of time.

Agency Experience

- Department of Corrections
- Department of Human Services
- Department of Education
- Department of Administrative Services
- Other – Audience participation

ITAM Workgroup

- Target date - January 2009
- Comprised of ITAM Coordinators and interested parties
- Meet annually to
 - Assess the inventory process
 - Review policy exception requests
 - Suggest changes in preparation for future inventories
- Interested in participating on the workgroup? Please call or send an email to
 - Email: IT_Investment.Review@das.state.or.us
 - Phone: 503-378-8366

Resources

- IT Asset Management Website:
http://www.oregon.gov/DAS/EISPD/ITIP/ITAM_index.shtml
- IT Asset Inventory Submission Schedule
- IT Asset Management Glossary of Terms
- IT Asset Inventory - Mandatory Attributes Table
- IT Asset Inventory Definition Document
- IT Asset Inventory Form - Hardware (.xls) - Required
- IT Asset Inventory Form - Software (.xls) - Optional

Contacts

- Sean McSpaden, Deputy State CIO
 - Email: Sean.L.McSpaden@state.or.us
 - Phone: 503-378-5257
- Charlene Wood, ITIP Executive Assistant
 - Email: Charlene.Wood@state.or.us
 - Phone: 503-378-8366
- General Contact:
 - Email: IT_Investment.Review@das.state.or.us
 - Phone: 503-378-8366

Questions?