The Fixed Assets Section of Accounting Services is responsible for the bar-code tagging of new assets for identification, performing inventory audits, and maintenance of the University Fixed Assets accounting records that document equipment and properties acquired by the school. These records are used in computing financial statements, overhead rates, adequate insurance coverage and values of loss by fire or theft.

In 2010, in order to be as efficient as possible, the Fixed Assets Team invested in the integration and deployment of an Asset Management System called Sage to scan and collect fixed asset information that is then uploaded/downloaded into and out of our ERP system Ellucian(Banner). This system uses barcode scanners, software, computers, and barcode printers to complete and maintain transactions. Updates to all of the “system” components were completed as required to keep the system up and running. However, during one of these recent updates, it was discovered that the current FA Asset Management System is out of compliance and cannot be updated to meet the necessary requirements. Additionally, the cost of updating the software and peripheral hardware associated with the current Asset Management System has become expensive and has fallen behind the current industry standards for Asset Management Systems.

While working with Information Technology Services(ITS) during the most recent Fixed Asset Annual Inventory, Fixed Assets became aware of a possible replacement Asset Management System that ITS is currently using(ServiceNow). ITS and Fixed Assets have collaborated to demonstrate and discuss how the ITS solution could translate into a Fixed Asset solution. Based on these discussions, Fixed Assets would like to engage with ITS to develop an implementation plan that will move the Fixed Assets Asset Management system to ServiceNow. This project would be assembled in phases. With phase I addressing the most immediate need for Fixed Assets - inventory of fixed assets. This project would have a timing constraint(completion date) of before the end of the fiscal year so that inventory could be collected and reported(to be confirmed by FA).

Resources needed for this endeavor would be Fixed Assets, ITS Asset Management, ServiceNow Admin, and an Ellucian(Banner) developer to tweak the current integration parameters(we believe that we should be able to use all or a good portion of the current integration set) and a PM(ITS has offered to supply this role). Most of the work has already been developed and is in use today; therefore, this should not be a heavy lift to move to this system. Additionally, ITS currently manages between 50 and 60 percent of all of the university’s fixed assets and has extensive experience and documentation, using, maintaining, and training users on how to use the ServiceNow System.
Some basic cost numbers to consider:

**Current Cost:**
- Number of positions required to maintain FA data and operations using current system
- Cost of Lic for Sage
  - I have in my notes 5,000 per yr
- Cost of scanners
  - I have in my notes $1,200 per device
- Cost for maintaining Interface to Banner
- Annual Maintenance Cost for Scanners?? Sage??
- Cost of labels
- Cost of Barcode Printer
  - Stand alone, low volume, non network, non RFID
  - ~ $300
- Cost of label software?
  - Freeware is currently being used???

**Potential Cost: (Will determine as decisions are made as we uncover requirements)**

- Lic requirements for ServiceNow
  - Request vs Management
  - Management -ITIL lic per person - $456/yr
    - These licenses would be individual license(There are not generic license/users available)
- Shared Inventory and Audit Resources
- Shared Scanner Resources
  - We use these today. Companion barcode scanners
    - They are ~$300 per device
  - RFID Scanners will be more depending on the type of barcode we identify will meet our requirements.
- Shared iPad/MS Surface Resources
  - ITS may have some available spares that we can repurpose for initial use.
  - Review Compatibility and effectiveness

**Other items that will need to be considered as part of the project**
- Inventory
  - Rolling audit sampling with rules and Policies governing what the procedure would be If the sample comes back wrong
    - Such as during the sampling - issue is determined then more investigation needs to happen
If more issues are uncovered, then maybe a full inventory is required
- 15% Fixed Asset Auditing for all University FA
- Or other approved adjustments to meet University and State requirements.

- Shared Responsibility for maintaining and auditing each departments FA
  - Maybe have a designated person within each Major area
  - Auditing of a certain percentage of Fixed Assets by the FA group
  - Or other appropriate process that will meet University and State requirements

- Potential to collect and maintain all assets (not just FA) for areas across the University
  - ITS does this today

- Training/Asset Management User Groups (on some regular meeting cadence)
  - For continuous training and feedback across the university

- Shared Scanners (~$300 ea) for the current model that ITS uses
  - Current Sage Scanners are $1200 or more each

- Shared iPad Resources Linked to a specific Scanner
  - We found through experience that this works most effectively by reduction of user setup and maintenance.

- Secure Desktop
  - Creation of a Secure Desktop configuration that would allow a secure centrally managed environment that can be effectively maintained, kept up to date, accessed and used remotely

- Increased Mobile support and configuration within SN with the latest release (Quebec)

- Dashboard Creation

- Reporting Capabilities

- ServiceNow Interface with Banner
  - Phase I would be similar to today’s interface with Sage
    - There are currently two interfaces on the Banner side that would need to be modified as part of Phase 1 to address the immediate needs
      - FZPFBEX - Banner data export to Sage (to be SNOW) - 40 hour modification estimate
      - FZPFBIM - Import data in to Banner from Sage (to be SNOW) - 40 hour modification estimate
    - Potential future work could include some type of API call sending updates back and forth in real time (more investigation needed).
    - Tweaking of the data that moves back and forth between Banner and SNOW

**Stakeholders** The following individuals and organizations have a stake in the project outcome:

<table>
<thead>
<tr>
<th>Name</th>
<th>Project Role</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melissa Hoff</td>
<td>Executive Sponsor</td>
<td>Finance - University Controller</td>
</tr>
<tr>
<td>Heather Snelling</td>
<td>Department Sponsor</td>
<td>Finance</td>
</tr>
<tr>
<td>Greg Hodges</td>
<td>Finance Technology</td>
<td>Finance Administration</td>
</tr>
<tr>
<td>Resource</td>
<td>Estimate in hrs</td>
<td></td>
</tr>
<tr>
<td>----------</td>
<td>----------------</td>
<td></td>
</tr>
<tr>
<td>ServiceNow Admin (Steve Smith)</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>HW Asset Administrator (Kim Ivey-Bourne)</td>
<td>160</td>
<td></td>
</tr>
<tr>
<td>ITS Resource Management Technology Planning (Jack McGuinn)</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td>Ellucian (Banner) developer (Wendy King)</td>
<td>80</td>
<td></td>
</tr>
</tbody>
</table>