INTRODUCTION

Summary/Description
Fixed Assets would like to engage with ITS to develop an implementation plan that will move the Fixed Assets Asset Management system to ServiceNow.

Business Need/Opportunity
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 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.

Service Description
This project will refine the requirements necessary to develop and implement a plan for the migration of Fixed Assets current operational asset management system from Sage to ServiceNow including the building and refining of the interfaces from ServiceNow to Banner.

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. 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 the university’s fixed assets and has extensive experience and documentation, using, maintaining, and training users on how to use the ServiceNow System. A ServiceNow Interface with Banner would be developed like the existing interface with Sage.

- There are currently two interfaces on the Banner side that would need to be modified to address the immediate needs
  - FZPFBEX - Banner data export to Sage (to be SNOW) - 40 hour modification estimate
  - FZPFBIM - Import data into Banner from Sage (to be SNOW) - 40 hour modification estimate

Timeline/Desired Completion Date
- Setup/configuration of SN/Mobile Reach/Scanners and requirements gathering can begin in May 2021
- Fixed Asset Staff will be unavailable for testing until Mid July 2021
- Projected completion date is August 31, 2021
1. Objectives
   a. Business Objectives
      Implement a Fixed Assets Management System that can manage all fixed assets that UNCG currently has oversight for. System should interface with our current ERP system, Ellucian Banner. System should integrate with new CHS SERIES 7 companion barcode scanners, to be purchased as part of the project.

      The current operational 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. Transitioning the current operational FA Asset Management System will provide a compliant, cost effective, scalable, industry standard platform that will allow continual improvements to the Fixed Assets Operation.

   b. Project Objective
      - Migration of current FA operational system (Sage) to ServiceNow which includes the following:
        - ServiceNow setup/configuration to incorporate Fixed Assets
        - Mobile Software Setup and configuration
        - Purchasing and setup of companion barcode scanners with hardware devices
        - Modification of current Banner Interfaces to work with ServiceNow
        - Building of transform Maps in ServiceNow for Banner Interfaces
        - Barcode Printing verification
        - Creation of reports/dashboards
        - Training/documentation

2. Project Scope
   a. High-Level Requirements/Deliverables
      - Purchase and Setup of ServiceNow for FA users
      - Purchase, installation, and configuration of companion barcode scanners
      - Installation and configuration of Mobile Software Integration on designated Mobile devices (Mobile Reach) - Need to check into license requirements
      - FA ServiceNow specific development and configuration (request, model categories, CI integration, required fields, etc)
      - Setup and testing of Barcode printing capabilities
      - Setup of a secure Desktop configuration (Citrix setup) for enterprise management of a standard UI/Desktop for all users. (TBD)
● Integration of data between ServiceNow and Ellucian Banner. Current Banner side interfaces:
  ○ FZPFBEX - Banner data export to ServiceNow
  ○ FZPFBIM - Import data into Banner from ServiceNow
● Import of all university fixed asset records into ServiceNow
● Creation of Operational Reports in ServiceNow for FA and clients
● Creation of Relevant Dashboards in ServiceNow for FA
● Policy and Procedure requirements for FA
● User acceptance testing in Dev, Val
● Updating and creation of Knowledge Articles in ServiceNow
● Training of Asset Management in ServiceNow
● Training of Mobile application integration with ServiceNow
● Promotion to Production Instance of ServiceNow and Ellucian Banner

b. Out of Scope
● RFID Scanners
● Decentralization of asset management and inventory to campus departments
● Maintenance of assets outside what is required by Fixed Assets
● Any work not specifically defined in the scope of this document will be considered out of scope

3. Project Completion Criteria
● Completion of all deliverables
● User Acceptance Testing and Sign off of all deliverables

4. External Dependencies
● Change Advisory Board

5. Assumptions
● Client resources will be available during the time allocated on WBS

6. Constraints
● Client and IT resources assigned to this project have also been allocated to other institutional and divisional projects in addition to daily operational support

7. Risk Assessment
<Needed after Project Approval - List any risks identified for performing or not performing the project>

8. Training Requirements
● Training of Asset Management in ServiceNow
● Training of Mobile application integration with ServiceNow
PROJECT MANAGEMENT

High-Level Work Breakdown Structure

Preliminary information added after Project Approval, Completed during Project Planning - Define the scope of the business process – start to end and the depts on campus to be included and impacted in the scope.

- Purchase of Barcode Scanners
- Acquisition of 2 mobile devices and installation/configuration of Mobile Reach software
- Purchase of ServiceNow license for Fixed Assets (Heather Snelling and Laura Williams)
- Map ServiceNow fields to Banner FA fields
- FA ServiceNow specific development and configuration (request, model categories, CI integration, required fields, etc)
- Setup and testing of Barcode printing capabilities
- Modification of existing Banner interfaces to import and export data between ServiceNow and Banner
- ServiceNow Dashboard creation
- Report creation
- Training

Communication Plan

- Project Kickoff Meeting held May 25, 2021
- Project Status Meetings will be held weekly through Zoom
- Status Reporting will be distributed through ServiceNow

Resources
The following individuals and organizations will be actively involved in the project:

<table>
<thead>
<tr>
<th>Name</th>
<th>Project Role</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joella Anderson</td>
<td>Project Manager</td>
<td>Technology Planning and Operations</td>
</tr>
<tr>
<td>Heather Snelling</td>
<td>Subject Matter Expert/Tester</td>
<td>Fixed Assets</td>
</tr>
<tr>
<td>Laura Williams</td>
<td>Tester</td>
<td>Fixed Assets</td>
</tr>
<tr>
<td>Kim Ivey-Bourne</td>
<td>IT HW Asset Administrator</td>
<td>Information Technology Services</td>
</tr>
<tr>
<td>Steve Smith</td>
<td>Platform Lead ServiceNow</td>
<td>Information Technology Services</td>
</tr>
<tr>
<td>Wendy King</td>
<td>Developer</td>
<td>Information Technology Services</td>
</tr>
<tr>
<td>Jack McGuinn</td>
<td>IT Resource Technology Planning - PM</td>
<td>Information Technology Services</td>
</tr>
</tbody>
</table>
**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>Sponsor</td>
<td>University Controller</td>
</tr>
<tr>
<td>Heather Snelling</td>
<td>Primary Client</td>
<td>Fixed Assets</td>
</tr>
<tr>
<td>Vickie Gaskill</td>
<td>IT Asset Owner</td>
<td>Information Technology Services</td>
</tr>
</tbody>
</table>

**QUALITY PLAN**  

<Preliminary information added after Project Approval, Completed during Project Planning - Include how the system, application, process, etc will be tested and verified for acceptance signoff and production usage>  

**BUDGET**  

<Estimates Needed when Demand is Submitted, Refined after Project Approval and Finalized during Project Planning - Include skill set and cost estimates for any major expenditures such as Equipment, Outside Consultation, etc. As requirements are further defined, estimates may be re-evaluated and updated>  

**Financial Information**  

- ServiceNow License $456/yr per user  
- CHS SERIES 7 barcode scanners (3 each, 2 for daily use and 1 backup) (need exact scanner model and cost) Range $300-$600  
- Ipad/MS Surface tablets (spares available from ITS?)  

Total Estimated Cost:  

Total Estimated Hours:  
Total Estimated Services Cost:  
Total Estimated ongoing Service and Support: yearly renewal of licenses  

**IT Resource/Skill Type Estimated Hours**  

<table>
<thead>
<tr>
<th>Resource</th>
<th>Estimate in hrs</th>
</tr>
</thead>
<tbody>
<tr>
<td>ServiceNow Admin(Steve Smith)</td>
<td>80</td>
</tr>
<tr>
<td>HW Asset Administrator(Kim Ivey-Bourne)</td>
<td>160</td>
</tr>
<tr>
<td>ITS Resource Management Technology Planning(Jack McGuinn)</td>
<td>120</td>
</tr>
<tr>
<td>Ellucian(Banner)developer(Wendy King)</td>
<td>80</td>
</tr>
<tr>
<td>Systems Engineering - Secure Desktop Build(TBD)</td>
<td>80</td>
</tr>
</tbody>
</table>
Estimated cost of Software/Hardware/Services/Other

Estimation of ongoing Service and Support

<table>
<thead>
<tr>
<th>Service or Support</th>
<th>Frequency (Annual, 5years or monthly)</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>ServiceNow Licensing</td>
<td>Annual</td>
<td>$456 per user</td>
</tr>
<tr>
<td>Other</td>
<td></td>
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</tbody>
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CHANGE MANAGEMENT

<Preliminary information added after Project Approval, Completed during Project Planning - List approvals for your project. Such as Scope Changes, Production Downtime, Budget, etc.>