

<b>Number:</b>	02.2.4	<b>Page:</b>	1 of 2
<b>Latest Version:</b>	1.0	<b>Revision Date:</b>	12/15/2014
<b>Effective Date:</b>	1/28/2015	<b>Replaces:</b>	NEW
<b>Revised By:</b>	Joshua Graves	<b>Review Cycle/Date:</b>	Annual
<b>Reviewed By:</b>	Linda Grigsby	<b>Reviewing Unit:</b>	IT Asset Management Team
<b>Title:</b>	PC Inventory Tracking SOP		
<b>Description:</b>	This document is the operating standard for the tracking of PC inventory.		

## PC Inventory Tracking

### Standard Operating Procedure

#### 1. General Statement of Purpose

1.1. The purpose of this document is to describe the tracking of PC inventory.

#### 2. Scope

2.1. This document applies to the ISD technical services teams and their process of tracking PC inventory.

#### 3. Discipline

3.1. Administrative Standards

#### 4. Instructions

4.1. Inventory Control information is entered by PC Support Technicians as a note in a CRM Case for all of the following PC events: deployment, status change, repair, return to vendor and return to stock. All work should be related to a CRM Case ---with no exceptions.

4.2. The PC Support Technician is responsible for adding **IT Asset Management** as an Interested Party to all appropriate CRM Cases.

4.3. Before closing a CRM Case, the PC Support Technician will verify that **IT Asset Management** is an Interested Party and add a note to the case with the following Inventory:

- SUBJECT LINE OF NOTE: **Inventory**
- VISIBILITY: **Internal**
- NOTE TYPE: **Additional Information**
- IN THE BODY OF THE NOTE:
  1. Asset Tag Number and Serial Number for the laptop, tablet or PC.
  2. Asset Tag Number and Model Number for the monitor or other peripheral, as needed.
  3. Location: Agency Name, Street Address, Floor, Room or Cubicle #
  4. User Name
- **Note:** If an asset is being replaced, the same information will be noted for the asset being replaced.

4.3.1. For Status Changes, a PC Support Technician will record any change in software, employee assignment, or physical location, as well as adding the Inventory Control information as shown above.

<b>Number:</b>	02.2.4	<b>Page:</b>	2 of 2
<b>Latest Version:</b>	1.0	<b>Revision Date:</b>	12/15/2014
<b>Effective Date:</b>	1/28/2015	<b>Replaces:</b>	NEW
<b>Revised By:</b>	Joshua Graves	<b>Review Cycle/Date:</b>	Annual
<b>Reviewed By:</b>	Linda Grigsby	<b>Reviewing Unit:</b>	IT Asset Management Team
<b>Title:</b>	PC Inventory Tracking SOP		
<b>Description:</b>	This document is the operating standard for the tracking of PC inventory.		

- 4.3.2. For Repairs, if an asset is removed from its designated site for repairs, the asset will be checked out to the repair location (ISD Data Center). When the asset is returned from the repair location, it will be checked back in. This process will be logged by the PC Support Technician in the CRM Case Notes in the above format, except the Subject Line will read **Inventory – Repair**.
    - 4.3.2.1. If an asset is no longer serviceable, it will be given to the IT Asset Management Team for surplus processing.
  - 4.3.3. For a Return to Vendor, the IT Asset Management Team must be contacted prior to returning an asset to a vendor.
  - 4.3.4. For a Return to Stock, the asset will be labeled with the employee’s name, current location and date of replacement. The PC Support Technician will bring the asset to the IT Asset Management Team.
  - 4.4. The IT Asset Management Team records the Inventory Control information for each item from the CRM Case Notes into the Altiris Asset Management System.
  - 4.5. 30 Day Hold – All assets being replaced will remain in OMES/ISD secure storage for 30 days before disposition is determined. This is to ensure the retention of the data on the asset for a minimum of 30 days.
  - 4.6. Warranty Replacement – If an asset is replaced under warranty by the manufacturer, the old asset is documented as transferred to the manufacturer and a new Tag Number will be issued to its replacement.
    - 4.6.1. The Asset Inventory Record for the replacement asset will also reflect the data of the old asset.
5. Roles and Responsibilities
- 5.1. PC Support Technician – Adds **IT Asset Management** has been added as an Interested Party to the appropriate CRM Cases and notes the cases with the Inventory Control information.
  - 5.2. IT Asset Management Team – Records Inventory Control information for each item from the CRM Case Notes into the Altiris Asset Management System.