Asset Champions Handbook

Colonial Williamsburg

THAT THE FUTURE MAY LEARN FROM THE PAST

What is an Asset Champion?

- At the highest level, an Asset Champion is a member of a department or division who will work with IT and the other members of their teams to maintain an accurate asset inventory for their team.

- Colonial Williamsburg maintains an inventory of over $3,000,000 of desktops, laptops, monitors, printers and other equipment used by employees for day-to-day operations.
  - Note that this dollar amount does not include servers, switches and other back-end equipment.

- With over 4000 installed assets it is not possible for 1 person to keep track of everything. So, we rely on all our employees to help maintain and accurate inventory.

- Champions have additional access in ATS (Asset Tracking System) http://assets.cwf.org. They will be able to see all assets assigned to their departments. They will also receive additional communications to let them know when assets are transferred or due to be replaced.

- Asset Champions are **not** responsible for it on their own. Champions will be a resource for the other members of their teams to help them with transferring assets, completing the annual asset inventory and replacing assets when they are due.
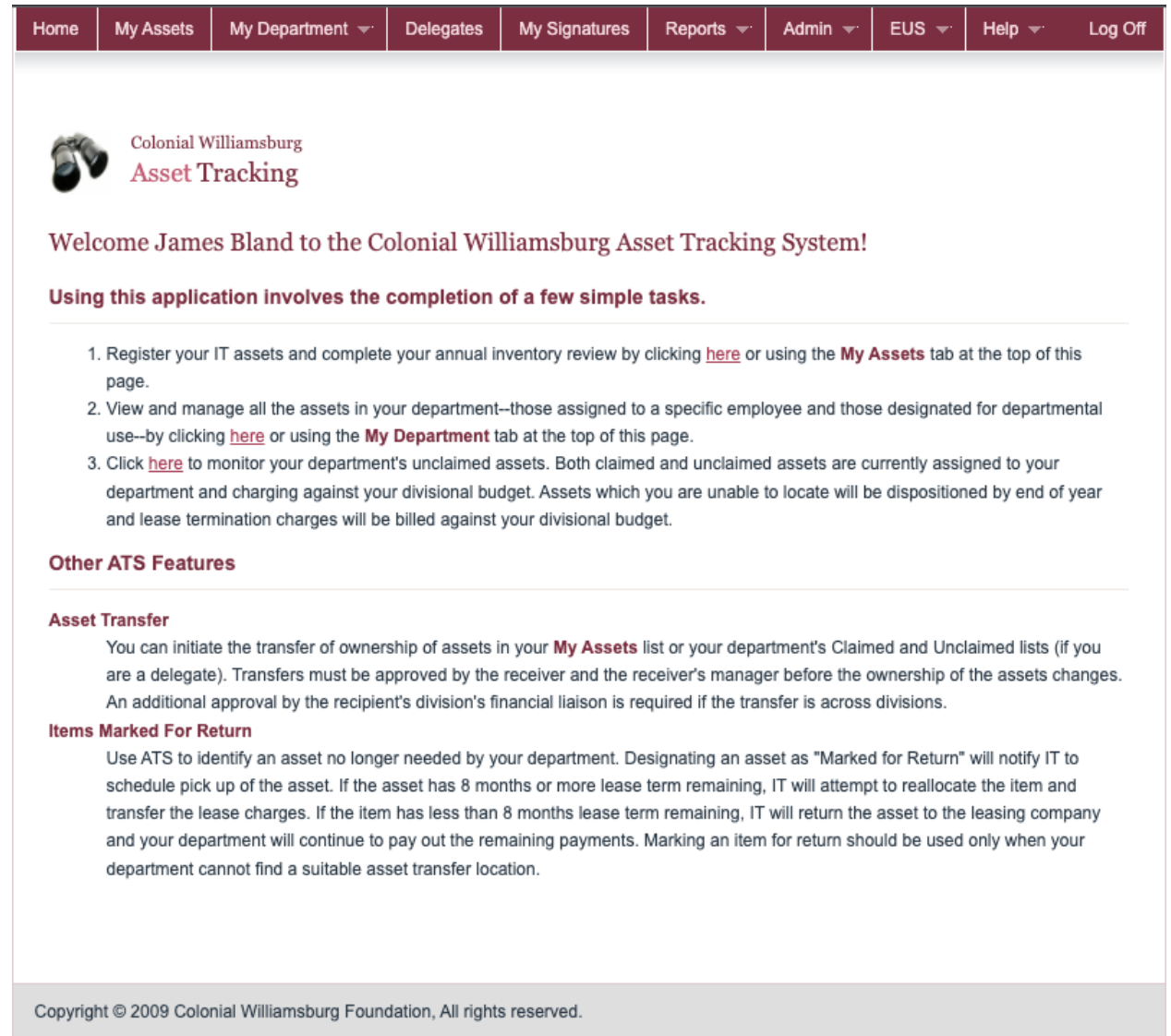
What are my responsibilities?

- Knowledge is the most basic responsibility of the Asset Champion. All employees are responsible for keeping track of their assigned assets. The goal of the Asset Champion position is to be a resource for their team members.

- With the additional capabilities in the ATS system some departments may ask their Champions to be more actively involved in managing the assets

- The main processes to be knowledgeable about are:
  - Replacement Process
  - Asset Inventory

What is ATS?

- ATS, or the Asset Tracking System is the system developed by IT to track CW's IT assets.

- The tasks performed in ATS include:
  - Replacements
  - Transfers
  - Electronic signatures
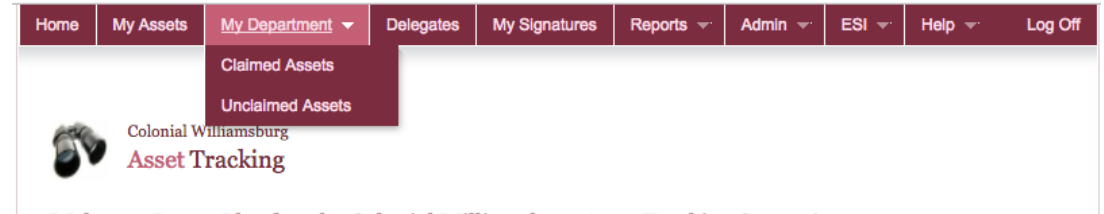 - Annual Inventory

- [ATS Training](#)

| Home | My Assets | My Department ▾ | Delegates | My Signatures | Reports ▾ | Admin ▾ | EUS ▾ | Help ▾ | Log Off |

Colonial Williamsburg
Asset Tracking

Welcome James Bland to the Colonial Williamsburg Asset Tracking System!

Using this application involves the completion of a few simple tasks.

1. Register your IT assets and complete your annual inventory review by clicking here or using the **My Assets** tab at the top of this page.
2. View and manage all the assets in your department--those assigned to a specific employee and those designated for departmental use--by clicking here or using the **My Department** tab at the top of this page.
3. Click here to monitor your department's unclaimed assets. Both claimed and unclaimed assets are currently assigned to your department and charging against your divisional budget. Assets which you are unable to locate will be dispositioned by end of year and lease termination charges will be billed against your divisional budget.

Other ATS Features

Asset Transfer
You can initiate the transfer of ownership of assets in your **My Assets** list or your department's Claimed and Unclaimed lists (if you are a delegate). Transfers must be approved by the receiver and the receiver's manager before the ownership of the assets changes. An additional approval by the recipient's division's financial liaison is required if the transfer is across divisions.

Items Marked For Return
Use ATS to identify an asset no longer needed by your department. Designating an asset as "Marked for Return" will notify IT to schedule pick up of the asset. If the asset has 8 months or more lease term remaining, IT will attempt to reallocate the item and transfer the lease charges. If the item has less than 8 months lease term remaining, IT will return the asset to the leasing company and your department will continue to pay out the remaining payments. Marking an item for return should be used only when your department cannot find a suitable asset transfer location.

Colonial Williamsburg THAT THE FUTURE MAY LEARN FROM THE PAST

ATS Key Design Concepts

- Each asset is owned by an employee and assigned to a department
  - The employee *claims* the asset to accept ownership
  - The asset is *assigned* to the employee's department when claimed
- Each asset has an *ASSET USE* that may be set by the owner. If an asset is:
  - "My asset"- select *NORMAL USE*
  - "not mine, but shared"- select *DEPARTMENTAL USE*
  - "for my volunteer or contractor"- select *NON-EMPLOYEE USE*
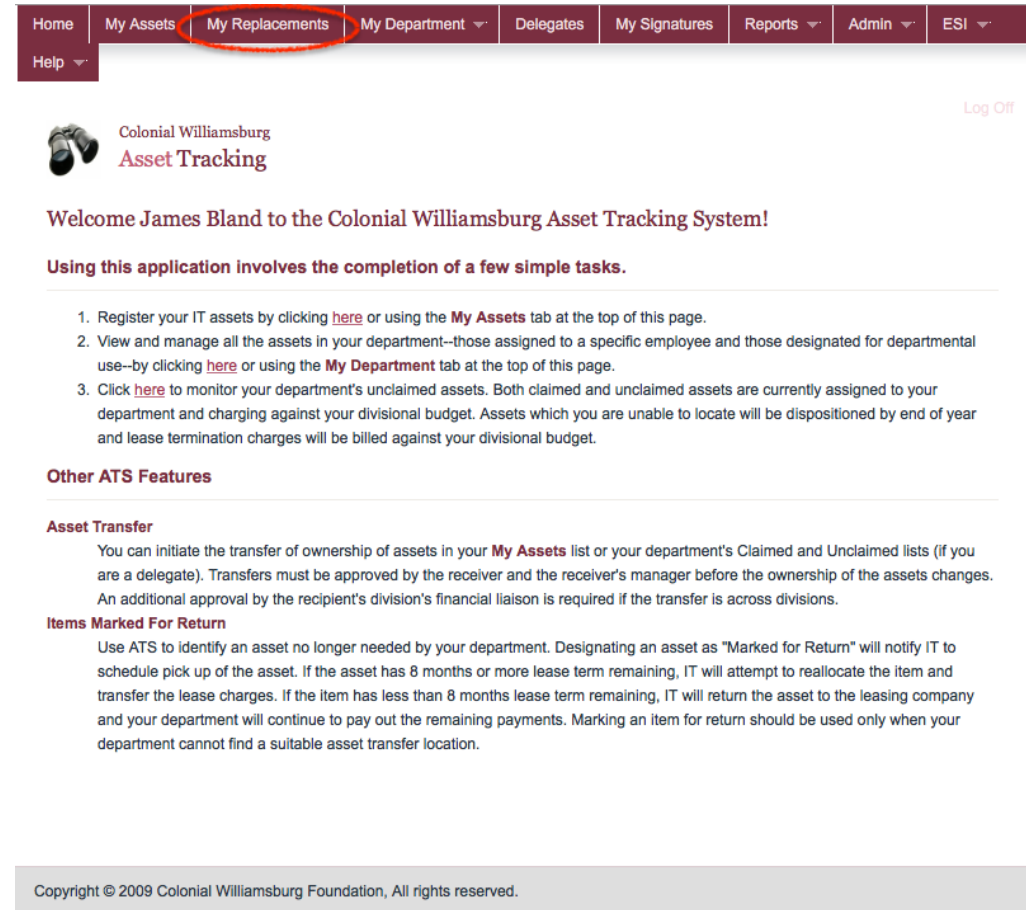 - "not found" or "not mine"- select *NO LONGER IN MY POSSESSION*

- Asset Champions and Managers can use the My Department function to view and edit claimed and unclaimed assets.

Replacement Process

- [Replacement Process](#)

- Desktops and laptops are replaced on a 4 year cycle.

- Monitors are only replaced when they are smaller than 22 inches

- Printers are not on a replacement cycle

- A current list of the standard equipment is maintained on Bits & Wisdom
  - [Current Standard Equipment](#)
  - Custom hardware can be ordered

The IT assets listed below, owned by one or more of your employees, are due for replacement in 4Q 2022.

Owner	T#	Model	Description	Location
David West	T00000135375	Dell Latitude E5470 14", i5, 2.40GHz, 8GB		Franklin Street Offices
James King	T00000129833	DELL PRECISION M3800 LAPTOP, 8GB		Franklin Street Offices

Your employees must take the following actions to complete the replacement process:

1. Verify ownership of the IT asset due for replacement. Work with IT to update as necessary.
2. Make his/her replacement selection within the Asset Tracking System (ATS). The cost of purchasing a like-for-like replacement was included in your division's budget. Non-standard selections will require management and financial liaison approval.
3. Work with IT to pick up the new asset or to schedule installation when it arrives.
4. Sign the electronic agreement after receiving the new asset.

The employees listed above will receive an email with instructions for completing the required actions. **If an employee fails to complete these steps per the schedule, a standard replacement will be selected and purchased on his/her behalf.**

Thank you in advance for helping us keep the Foundation's IT assets up to date!

The following IT assets assigned to you are due to be replaced in 4Q 2022.

Owner	T#	Model	Description	Location
Anthony Conyers	T00000129755	Belkin Widescreen 19" LCD Rack Console	Belkin Widescreen 19" LCD Rack Console	Franklin Street Offices Basement

These assets are the property of the Colonial Williamsburg Foundation and are provided for approved purposes as described in the Acceptable Use Policy. Click here to view the policy.

Please follow these four steps to complete the replacement process:

1. Verify ownership of each asset and contact IT to update, if necessary.
2. After ownership is verified, click here to enter ATS and make your replacement selections. **If you fail to complete this step by Wednesday, November 16, 2022, a standard replacement will be selected and purchased on your behalf.** Click here to view the details of the different replacement options.
3. When your replacement arrives, you will be contacted by IT to either come pick it up or to schedule installation. Please work with IT to ensure your replacement asset is installed within two weeks of first contact.
4. After the replacements are installed, you will receive an email requesting your electronic signature. You must sign within 7 days of installation in order to retain these assets and your computer account access.

Thank you in advance for helping us keep the Foundation's IT assets up to date!

Annual Asset inventory

All Colonial Williamsburg employees are required to review and update their asset inventory annually. The Asset Tracking System (ATS) assists employees in the inventory and management of their technology assets. The IT staff uses ATS to locate, replace and dispose of assets. ATS also facilitates stewardship of the significant investment the Foundation has made in technology equipment.

The inventory of assets must be completed by March 1, 2017. During the asset inventory process, employees must review each asset in the ATS "My Hardware Assets" list for accuracy. All assets assigned to employees are their sole responsibility and must be returned upon transfer of position or termination of employment. It is expected that employees ensure their assets are accurately reflected in ATS. When all modifications have been completed and your inventory is correct, click the "Complete My Inventory" button to complete the inventory process.
Click here to begin your asset inventory review and click here to read the ATS Inventory Employee Tips document. If prompted for a login to view the document, please use your CWF User ID and password.

The ATS Inventory Employee Tips document contains tips on adding, editing, and transferring assets within the ATS. Please call the IT helpdesk at x7300 if you have questions, issues, or concerns with the inventory process.

Asset Inventory

- Each year we will perform an asset inventory where we ask every user to verify the assets that are assigned to them in ATS.

- They can add assets that aren't assigned to them and transfer ones they don't have anymore.

- This should be a process that is followed all year but once a year we will require our users to verify their assets.

Colonial Williamsburg
Asset **Tracking**

Track My Assets

Inventory Status: Incomplete

The Foundation requires that each employee inventory their assets annually. Please follow the instructions below to complete your asset inventory.

Review each asset in your My Hardware Assets list for accuracy and completeness.

- If you need to add an asset, then click on the **Add an Asset** button.
- If an asset is no longer in your possession, then *1)* Select the asset(s) by clicking the check box *2)* Click on the **Edit Selected Assets** button *3)* Change the **Asset Use** drop down to "No Longer In My Possession". The asset will still be in your list, but marked with strikethrough text until it is located.
- If an asset in your possession is no longer needed, then *1)* Select the asset(s) by clicking the check box *2)* Click on the **Edit Selected Assets** button *3)* Change the **Asset Use** drop down to "Marked for Return". IT will arrange for the asset to be picked up.

Once your My Assets list is accurate, then click the **Complete My Inventory** button. By clicking this button, you acknowledge verification of the Foundation assets assigned to you.

Editing assets

- All users can edit some aspects of the asset details for their own assets.

- Asset Champions and Managers can edit the same details for any asset assigned to their department