

Asset Forms Instructions

This folder contains several files that pertain to your agency’s IT assets. These instructions provide information to make it easier to identify the files. The instructions also detail the steps needed to fill out the necessary spreadsheets that are needed for asset control compliance.

The Files - Overview

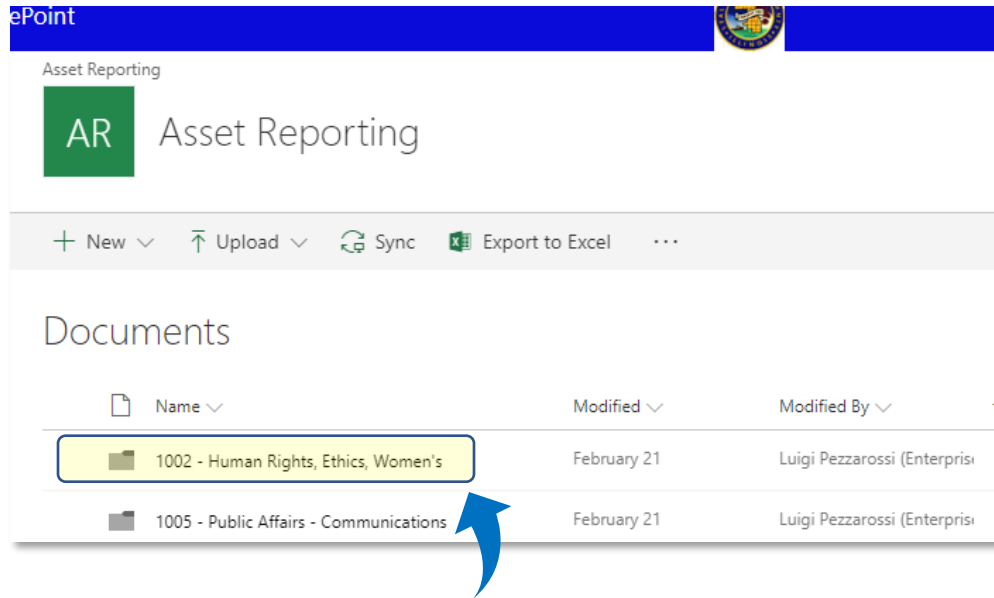
Inside your agency’s folder, you will find several files. Details on the information contained in these files is below:

PI – xxxx.xlsx	This is the file that your agency provided to the Comptroller’s office detailing your Capital Assets. Your computers should be included in this inventory.
Xxxx_IT_Assets.csv	This file has the inventory of computers, laptops, and tablets that are active and currently managed by BOTs Systems Management Systems.
Xxxx_IT_Assets_Refresh.csv	This file lists all computers, laptops, and tablets that are or will be older than 5 years by the end of this fiscal year. These devices should be replaced in the next fiscal year. This list provides a good starting point for your computer hardware refresh budget request for the next fiscal year.
2017_IT_Assets_Form_w_Samples.xlsx	This is the IT Assets form that is required by Budget. It lists your agency’s hardware and software assets. This form is a sample that includes some fields already filled out with sample data. This is an example form only.
2018_IT_Assets_Form.xlsx	This is the asset form that must be filled out for Budget. The information contained in the first two form on this table can be used to fill out a fair portion of the form. However, all fields need to be completed, which will require your agency to provide that data.

**Replace the x’s with your agency code. XXXX_IT_Assets.csv becomes 1009_IT_Assets.csv*

How to Access the Files

To access the files, simply navigate to your agency’s folder, and click on the folder name.



How to Interpret the Data in the xxxx_IT_Assets Files

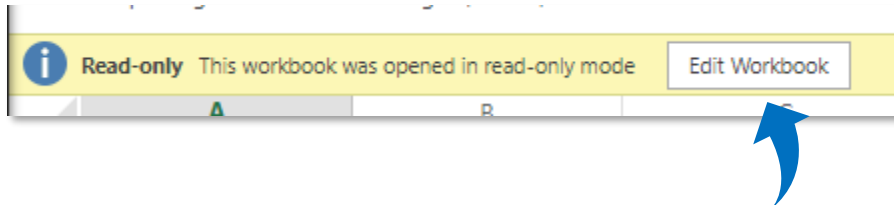
When reading the **xxxx_IT_Assets** and **xxxx_IT_Assets_Refresh** files, it is helpful to understand the information contained in certain fields. The list below should help to get the most benefit from this data.

Manufacturer	This is the company that fabricated the device.
Model	This is the device model. It can be used to define the type of device (desktop, laptop, tablet, etc).
RAM	This is the amount of memory installed in the device. It is reported in MB (Megabytes). Dividing the number by 1,000 will provide the amount of GB (Gigabytes). Devices with less than 8GB of RAM should be first in line for replacement. Devices with more than 8GB of RAM have likely received memory upgrades and should be last in line for replacement.
Workstation Name	This is the Host Name that appears on the lower right side of your desktop. The host Name contains information that can help you identify your machine. The 5 th character denotes the type of computer you have. D = Desktop. L = Laptop. T = Tablet. Everything after the 5th character is your serial number. <p style="text-align: center;"> <i>Example: ESBK</i> L 123ABC456 Laptop Serial Number </p> This will help fill out the IT Assets Form, which requires Serial Numbers.

Username	This is the person that utilizes the device the most. If the field has no username and is blank, the device is either: a) a shared asset used by several users, or b) an asset that is not being utilized by anyone. In the event of option b above, the device should not be included in your computer hardware refresh budget allocation request.
Year and Month	This is the system reported manufacture date of the device. This provides the start date of the device lifecycle and provides the expected replacement date. County computers are on a 5-year lifecycle. If you add 5 years to the listed year and month, you will know when to request refresh funds to replace the device.

How to Complete the IT Assets Form

Once inside your agency’s folder, you will see a file called **(current Fiscal Year_IT_Assets_Form.xlsx)**. Once you click on the file, it will open an online Excel spreadsheet with two tabs at the bottom. One is for your Software Inventory, the other for Hardware Inventory. When you double-click on an empty cell, you will see a pop-up that asks if you would like to edit the workbook.



Click on the Edit Workbook button to start entering data into the form. Please fill out the form online, as that will assist in keeping track of changes to the files.

If you have any problems or questions regarding the forms or the data contained, please email Serafin Chavez, BOT at (serafin.chavez@cookcountyil.gov).