

Look Behind the Curtain

Documentation Management: The Great and Powerful Oz of IT Asset Management

Documentation Management is ubiquitous – everything we do in IT asset management involves data and documenting that data. Ironically, that fact makes it easy to focus on the process being executed and to neglect document management as a discipline of its own. This lack of attention can lead to some of the biggest snafus that we can produce as asset managers. Imagine:

- An audit by a software vendor where you neglected to lengthen the normal retention policy of the corporation for crucial upgrade documents
- The EPA wants to know why a computer originally purchased by your company is in a landfill and you can't prove you sold it to someone else
- A flood wipes out a regional office and you have no copies of their software contracts and no discovery runs to help with reconstructing desktop configurations
- Your company is acquired and you are unaware of the “transfer of ownership” contract T&Cs and whether it is in any of the software contracts

Taking documentation management seriously requires understanding what it is and how you can best utilize best practices across your other activities. Let's take a look at what document management is and is not:

1. *It is not just about paper* – More than half of today's documents are electronic, requiring a different solution for access, storage and security. The same steps must be developed for paper documents, or the paper must be converted to an electronic format.
2. *It is not unique to IT asset management* - The benefit is that organizations typically have document handling procedures such as contracts with long term storage companies, back-up procedures and secured environments. The disadvantage is that these measures may not be robust enough to meet the specific needs of IT asset management. Since few individuals have actual training in documentation management, the professional IT Asset Manager should plan on contributing expert help to the corporate programs.
3. *It is about developing compliance* – Regardless of how well instances of software are deployed, counted and removed, the bottom line is proving the right to use. Documentation is required to provide the right to use and the contract specifically outlines how it should be used.
4. *It is not about meaningless paperwork* – if a process is hampered by too many forms or systems are loaded with data that is impossible to maintain, then documentation management becomes a disciplined approach to eliminating documents and streamlining processes. Documents are the communication trail, intertwined with the processes and goals of IT asset management. Review of the efficacy and value of documentation on a regular basis is a great way to uncover opportunities for improvement.
5. *It is about serving the needs of the organization* – Since IT Asset Managers serve every individual in the organization, educating and communicating with every individual is an impossible task without documentation that explains the what, the how to and the why surrounding IT assets. IT operations requires data on assets in order to manage the environment, the Finance department requires information about capitalized assets, budget planning and the location of assets for tax purposes. Procurement requires information about the vendor and satisfaction with the products that are due to be renewed. IT Asset Managers meet all of these needs by developing forms or reports and including these documents in the ongoing processes.
6. *It is about disaster recovery* – From an IT asset management perspective, disaster recovery is a specialized application for documentation management and the processes are part of this discipline. Disaster recovery is all about preservation of the company's business and each employee's ability to perform essential duties. Current hardware and software configurations are important for restoration and for insurance. Without stored proof of purchase, software vendors are within their rights to audit and force payment again.
7. *It is about understanding the legal documents* – Contract Management, which includes understanding the



information in the contract, is part of Documentation Management. Typically, contract information is found in multiple places, including paper, in an IT asset management repository or in a contracts management system. Best practices for documentation management such as security, retention, accessibility and archiving are all applicable to contracts. However, documentation management goes further and has specific best practices for contracts, requiring IT Asset Managers to understand the legal content of those contracts. As permissive documents that explain how an asset can be used, the terms and conditions are fundamental to compliance.

The understated power of documentation management is in the uniform application of the document rules across all processes. With every process improvement project executed for IT asset management, documentation management assures that information usability, retention and security are part of the project. Additionally, a focused internal audit of the documents and their management is an excellent diagnostic technique, uncovering historical steps that are no longer necessary, identifying holes in processes and improving disaster recovery coverage.

In the 1939 film, *The Wizard of Oz*, the Great and Powerful Oz was uncovered as a man behind a curtain. Despite being an ordinary man, he was able to resolve issues and deliver value. Documentation Management is like that ordinary man, with straight-forward defined set of activities that deliver success through organizational goal attainment which leads to fewer unexpected financial events.

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Where do your IT assets go when you dispose of them?

- Landfills in third world nations
- Evidence rooms awaiting litigation
- The grateful hands of identity thieves
- The water supply you drink from

Where should they go?

Intechra is the world leader in IT asset disposition. We focus exclusively on eliminating the risks surrounding data security, compliance, and environmental impact, while maximizing value recovery on IT asset investment for businesses around the world.

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