Title: Method and System for Asset Transition Project Management

This non-provisional application claims priority based upon prior U.S. Provisional Patent Application Serial No. 60/342,031 filed December 18, 2001 in the names of Shawn Thomas, Gregory Gray, Michael Woodfin, Warner Mizell and Brian Thomas, entitled "Method and System for Deploying, Tracking and Managing Technology-Related Resources."

BACKGROUND

The present invention relates generally to an improved method and system for asset transition project management. More particularly, the present invention provides a means for aggregating information into a computerized database. Thereafter, assets that are electronically connected to the computerized database are monitored. If a transition occurs, information concerning the transition is input into the computerized database on a real-time basis during the implementation of the transition. The information input into the computerized database can be used to manage the transition.

Large enterprises are faced with a daunting task when it comes to managing their information technology resources. Each user within the enterprise demands up-to-date hardware devices. This fact, coupled with the proliferation of new hardware devices, such as PDAs, cell phones and laptops, creates an enormous problem when it comes to tracking each device. This also makes it difficult to determine whether the transition of a device, for example, the installation, replacement, disposition or maintenance of the device, is being conducted efficiently and properly. Moreover, the process of managing asset transitions becomes extremely complicated.

In many cases, such transaction activities are tracked manually. For example, after a technician performs

an asset transition activity, he may record certain information concerning the activity either in manual or digital form. Thereafter, he may return to his office where he may record the information to either a handwritten log a local computer database. Alternatively, the information may be called in or sent by e-mail to a central repository. In any event, there is a significant delay between the time the asset transition event occurs and the information is recorded into a data repository. A further limitation of the prior art is that the information collected by the technician may either be collected inaccurately or may be transferred inaccurately into the centralized repository. As a result of the foregoing limitations, information is not available to manage asset transition projects on a real-time basis. Consequently, a need exist for an improved method and system for asset transition project management.

SUMMARY

The present invention addresses the need for an improved method and system for asset transition project management. The method and system of the present invention provides an improved technique for asset transition project management. Information regarding the enterprise's assets is aggregated from a variety of sources into a computerized database. Thereafter, assets that are electronically connected to the computerized database are monitored. If a transition occurs, information concerning the transition is input into the computerized database on a real-time basis during the implementation of the transition. The information input into the computerized database can be used to manage the transition.

THE DRAWINGS

The disclosed invention will be described with reference to the accompanying drawings, which show important sample

embodiments of the invention and which are incorporated in the specification hereof by reference, wherein:

FIG. 1 illustrates the preferred method of asset transition project management;

FIG. 2 illustrates a screen display identifying the types of reports available to the user;

FIG. 3 illustrates a screen display showing the content of the Management Status by Location report;

FIG. 4 illustrates a screen display showing the content of the Management Status by Group report; and

FIG. 5 illustrates the preferred system for asset transition project management.

EMBODIMENTS OF THE INVENTION

The numerous innovative teachings of the present application will be described with particular reference to the presently preferred exemplary embodiments. However, it should be understood that these embodiments provide only a few examples of the many advantageous uses of the innovative teachings herein. In general, statements made in the specification of the present application do not necessarily delimit any of the various claimed inventions. Moreover, some statements may apply to some inventive features, but not to others.

FIG. 1 illustrates a work flow process for the preferred embodiment of the asset transition project management method. The first step in the method is the creation of a computerized database **101**. The computerized database **101** will contain substantive information concerning assets owned by the enterprise. The computerized database **101** may be, for example, a relational database. In addition, the database may be located remotely from the location of the asset transition. Information included in the computerized database may include, for example, asset ownership information, usage

information, user information, legacy asset information, new asset information, software application information, financial information, site information, event history information and logistical information. The database may include information on such assets as desktop computers, laptop computers, hand-held computers, printers, scanners, networking devices and storage devices. All assets are electronically connected to the computerized database **101**.

Once a thorough, comprehensive, computerized database **101** has been created, the assets that are electronically connected to the computerized database **101** are monitored to determine whether an asset transition **102** has occurred. An asset transition **102** may be an event such as an asset installation, asset relocation, asset disposition or asset maintenance activity. Information from the asset transition **102** may be transmitted to the computerized database **101** through, for example, the Internet or a local area network. In addition, the transmission may occur by secure, encrypted means.

Upon the occurrence of an asset transition **102**, information relating to the asset transition is transmitted electronically to the computerized database **101** thereby inputting transition information **103** into the computerized database **101** on a real-time basis. The information is transmitted to the computerized database **101** concurrently with and as a part of the asset transition **102**. By instantaneously and simultaneously inputting transition information **103** into the computerized database **101**, any delay in updating the database is eliminated. Thereafter, information in the computerized database can be used to manage asset transition activities **104**. The types of activities that may be managed as part of the aforesaid management may include, for example, installation management, relocation management, lease management,

exception management, scheduling management, workflow management and resource management. In addition, reports may be generated to assist with the project management activities. Reports may include, for example, status by location, status by group, hardware mix by site, user software, warehouse status by group, technical status, asset reconciliation, asset disposition and user satisfaction survey.

FIG. 2 illustrates a screen display identifying the types of reports available to the user. Typical reports include a Status by Location report which provides an overall summary of activity by site, a Status by Group report which provides summary information by schedule group, a Hardware Mix by site report which summarizes the hardware profiles selected by site or enterprise-wide, a User Detailed Software Report which summarizes the selected user software by site, schedule group or department, a Warehouse Status by Group report which provides summary and detail information about pre-deployment activities, a Technical Status report which provides summary and detail information about installations, quality control and timeliness, an Asset Reconciliation report which provides details by site or schedule group of assets removed and installed, an Asset Disposition report which contains details by site or schedule group of legacy assets to be removed, and a User Survey report which provides summary and detail level information about user current and new assets. Because all information in the computerized database **101** is updated on a real-time basis, all information and all reports are up to date and accurate at all times.

FIG. 3 illustrates a screen display showing the content of the Management Status by Location report. The display provides a general management overview of such

information as the date the survey was completed, the asset count, the number of installations started, the number of installations completed, the number that have completed quality control and the number that have completed quality control follow-up, in each case by location.

FIG. 4 illustrates a screen display showing the content of the Management Status by Group report. The display provides such information as installation schedule date, units scheduled, the number of installations completed, the number of installations started, the number of serial numbers recorded and the number of backups completed in each case by group.

FIG. 5 illustrates the preferred embodiment for a system for asset transition project management. A series of assets **501, 502, 503 and 504** are attached to a computerized database **500**. Each of the assets **501, 502, 503 and 504** are electronically connected **511, 512, 513 and 514** to the computerized database **500**. The computerized database **500** may be located remotely from the assets **501, 502, 503 and 504**. If so, transmission of information from the computerized database **500** to the assets **501, 502, 503 and 504** may be through the Internet or through a local area network. In addition, transmission of information between the assets **501, 502, 503 and 504** may be made in a secure, encrypted manner. The assets **501, 502, 503 and 504** may be such as assets as desktop computers, laptop computers, hand-held computers, printers, scanners, network devices and storage devices.

The system provides a means for monitoring the transition of the assets **501, 502, 503 and 504**. An asset transition may include an asset installation, asset relocation, asset maintenance activity or asset disposition. When an asset transition occurs, the system provides a means for inputting new information relating to

the transition into the computerized database **500** concurrently with transition of the assets. The information in the computerized database **500** is continuously and simultaneously updated.

Because the information in the computerized database **500** is current and up to date on a real-time basis, the information in the database can be used to manage asset transition activity. The type of management activities that may be performed using the information in the computerized database **500** may include, for example, installation management, relocation management, lease management, exception management, scheduling management, workflow management and resource management. In addition, the information in the computerized database **500** may be used to generate reports such as status by location, status by group, hardware mix by site, user software, warehouse status by group, technical status, asset reconciliation, asset disposition and user survey.

WE CLAIM:

1. A method for asset transition project management comprising the steps of:

creating a computerized database, said computerized database containing information relating to the assets of an enterprise wherein said assets are electronically connected to said computerized database;

monitoring the transition of said assets;

inputting new information relating to said transition into said computerized database on a real-time basis during the implementation of said transition; and

using said new information to manage said transition of said assets.

2. The method of Claim 1 wherein said computerized database is a relational database.

3. The method of Claim 1 wherein said information is selected from the group consisting of user information, legacy asset information, new asset information, software application information, financial information, site information, event history information, logistical information, ownership information and usage information.

4. The method of Claim 1 wherein said assets are selected from the group consisting of desktop computers, laptop computers, handheld computers, printers, scanners, networking devices and storage devices.

5. The method of Claim 1 wherein said computerized database is located remotely from the location of said assets.

6. The method of Claim 1 wherein said information is transmitted to said computerized database through the Internet.

7. The method of Claim 1 wherein said information is transmitted to said computerized database through a local area network.

8. The method of Claim 6 wherein said information is transmitted to said computerized database through secure, encrypted transmission.

9. The method of Claim 1 wherein said transition is selected from the group consisting of asset installation, asset relocation, asset maintenance and asset disposition.

10. The method of Claim 1 wherein said new information is used to manage said transition through management activities selected from the group consisting of installation management, relocation management, lease management, exception management, scheduling management, workflow management and resource management.

11. The method of Claim 1 wherein said new information is used to manage said transition through the production of reports.

12. The method of Claim 11 wherein said reports are selected from the group consisting of status by location, status by group, hardware mix by site, user software, warehouse status by group, technical status, asset reconciliation, asset disposition and user survey.

13. A system for asset transition project management comprising:

a computerized database;

assets electronically connected to said computerized database;

means for monitoring the transition of said assets;

means for inputting new information relating to said transition into said computerized database during said transition of said transition;

means for using said new information to manage said transition of said assets.

14. The system of Claim 13 wherein said computerized database is a relational database.

15. The system of Claim 13 wherein said information is selected from the group consisting of user information, legacy asset information, new asset information, software application information, financial information, site information, event history information, logistical information, ownership information and usage information.

16. The system of Claim 13 wherein said assets are selected from the group consisting of desktop computers, laptop computers, handheld computers, printers, scanners, networking devices and storage devices.

17. The system of Claim 13 wherein said computerized database is located remotely from the location of said assets.

18. The system of Claim 13 wherein said information is transmitted to said computerized database through the Internet.

19. The system of Claim 13 wherein said information is transmitted to said computerized database through a local area network.

20. The system of Claim 13 wherein said information is transmitted to said computerized database through secure, encrypted transmission.

21. The system of Claim 13 wherein said transition is selected from the group consisting of asset installation, asset relocation, asset maintenance and asset disposition.

22. The system of Claim 13 wherein said new information is used to manage said transition through management activities selected from the group consisting of installation management, relocation management, lease management, exception management, scheduling management, workflow management and resource management.

23. The system of Claim 13 wherein said new information is used to manage said transition through the production of reports.

24. The system of Claim 13 wherein said reports are selected from the group consisting of status by location, status by group, hardware mix by site, user software, warehouse status by group, technical status, asset reconciliation, asset disposition and user survey.