



# How Penn State Ditched the Spreadsheets and Transformed into an ITAM Powerhouse

“

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Somewhere on Penn State’s campus, there was a lab full of computers that no one had touched in years.

The machines were listed in a SharePoint spreadsheet, tagged as active assets, and quietly waiting to be replaced at the end of their cycle — at full cost to the department.

The only person who had ever logged in was the technician who set them up.

Jeff Foltz, IT Generalist at Penn State’s College of Liberal Arts, remembers the moment that discovery landed, “That’s the kind of insight that really makes you second-guess your replacement decisions.”

It was a moment that clarified just how badly the old way of managing hardware was failing them — and how much was riding on changing it.

Recently, Foltz presented at a special TeamDynamix ITAM event to share how the college ditched the SharePoint spreadsheets and matured its IT Asset Management processes with TeamDynamix.

## The Manual SharePoint-Based Inventory Nightmare

Penn State’s College of Liberal Arts ran hardware inventory out of manually maintained SharePoint lists for a number of years before using TeamDynamix ITAM.

This meant every asset, every warranty date, and every location had to be typed in by hand.

Foltz described the experience plainly: “It was a manual SharePoint-based nightmare.”

The spreadsheets showed what someone had entered, but nothing was live. “Everything in here was manually entered,” he explained. “There was no real-time status of who was logged in and how often they’ve been logged in. You could do a lot with the data that was in there, but none of it was live data.”

Budget season made the problem acute.

Each cycle, IT would send inventory lists out to roughly 50 departments. Each department would review, revise, ask questions, and send corrections back, often across multiple rounds of email.

Replacement decisions got made based on device age, or on what users said they needed, or on whoever was loudest in a meeting, Foltz explained.

Without real utilization data, there was no other basis for judgment.





## The Shift: Start Small, Build Momentum

The transformation didn't happen all at once. First, the team finally committed to getting serious and started by using TeamDynamix ITAM.

The first order of business was software licensing cleanup and location data hygiene. Not glamorous work, but foundational, Foltz said.

Once that foundation was solid, hardware replacement automation followed over the next couple of years.

Foltz is candid about his advice for teams still on the fence about using a proper ITAM tool: "Rip the band-aid off. Start small," he said.

And if you're not already using your ITAM platform as your primary inventory tool, that's where he'd begin, "Pick a process to automate, prove it out before trying to overhaul everything at once," he said.

The wins compound quickly once you have a baseline of clean, automated data to build on.

## What Real-Time Device Tracking Actually Looks Like

The most significant change wasn't any single feature; it was what it meant to have live data instead of static snapshots.

## Better Data, Better Decisions

"Showing them the data, which machines are aging out, which software wasn't being used, where the real needs were — that really improved our relationship with the departments, especially when budget conversations are involved."

Through TeamDynamix ITAM, the Penn State team can now see who last logged into any device, how many sessions occurred over the trailing 12 months, total active usage time down to the minute, and when the last session happened.

Why does this matter?

In one example, Foltz shared that a device showed 377 logins over a year but only about four and a half days of total active usage, roughly 15 minutes per session. That's a device you'd probably hold off replacing, though, as Foltz notes, the department always has context IT doesn't: a sabbatical, a medical leave, a role change.

What matters is that now the conversation starts with facts, not assumptions: "Seeing who the last user was that had logged in, seeing how often they're logging in can help with that conversation," Foltz said.

Warranty tracking went in the same direction. Scripts within the TeamDynamix platform now pull warranty data automatically from Dell, HP, and Lenovo via API every night at 1:00 AM. Apple devices come in through a JAMF and Apple School Manager integration, arriving already populated with purchase and warranty dates.

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The days of manually looking up serial numbers and entering dates into a spreadsheet are over, saving technicians valuable time.

## Giving Departments Access to Inventory Data

One of the most impactful changes was deceptively simple: giving department administrators direct access to their own inventory data, Foltz said.

Through role-based permissions with SSO integration, each admin can now log in and see only the devices in their scope, including real-time usage stats, replacement schedules, and warranty status.

They can update replacement decisions on the spot, during a budget meeting, without waiting for IT to pull a report.

## IT Asset Budgeting Optimized with Usage Data

Penn State's transformation from spreadsheets to mature ITAM illustrates something beyond workflow efficiency. When you can show a department head exactly which machines are aging out, which ones are barely touched, and what the real cost picture looks like, the nature of that budget conversation is fundamentally different.

“Showing them the data, which machines are aging out, which software wasn't being used, where the real needs were — that really improved our relationship with the departments, especially when budget conversations are involved,” Foltz explained.

IT stopped being the team that comes with a list of requests and asks people to take their word for it. They became the team that brings receipts.

“When they saw the data themselves, it was eye-opening,” Foltz said. “Once people see what's actually being used, the conversation around budgets gets a lot easier. It's black and white. It's not based on emotions or preferences or requests or guessing.”

Budget meetings that used to stretch across weeks of back-and-forth emails became focused sessions anchored in shared, verifiable facts, Foltz said.

For organizations still managing assets through spreadsheets and email threads, Foltz's message is simple: “If you're using spreadsheets, there's a better way.”

The goal isn't a perfect ITAM process on day one. It's progress, moving from manual to automated, from guesswork to data, from reactive to intentional.

Start small, prove it out, and build from there.

As Foltz puts it, the first step is just deciding to stop flying blind. “We're no longer blindly renewing things or saying ‘trust us.’

We're showing them real data to back up our recommendations and ultimately their decision.”

