

# HP Service Asset and Configuration Management (SACM) Solution

HP Service Manager, HP Asset Manager and  
HP Universal CMDB

Windows Operating System

Software Version: 9.40

Concept Guide



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# Welcome to This Guide

This guide provides general information about the Service Asset and Configuration Management (SACM) Solution—what the solution can accomplish and for whom.

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## How This Guide is Organized

This guide contains the following chapters:

**Chapter 1 Introduction to SACM**

Provides a brief description of the Service Asset and Configuration Management (SACM) Solution and illustrates a typical deployment.

**Chapter 2 SACM Use Cases**

Provides sample customer scenarios implementing the SACM Solution capabilities. This section demonstrates what you can achieve with this solution.

## Who Should Read This Guide

This guide explains the motivation to install and use the SACM solution. It describes what the solution implementation will achieve, which ITIL (Information Technology Infrastructure Library) processes it facilitates, and describes the workflow between the products comprising the solution.

This guide is intended for:

- Customers
- HP Presales and Sales personnel
- HP Professional Services
- Anyone who wants to learn about the solution, its flow, and its value or the value it delivers

The information in this guide may duplicate information available in other SACM documentation, but is provided here for convenience.

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# Introduction to SACM

## This chapter includes:

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## SACM – Overview

SACM provides a necessary data foundation that is core to operating IT. This enables the business to function within its own constraints while taking into account the unique needs of the business. Many key IT (ITIL) processes rely on SACM being in place in the organization; including all of the following:

- Service Portfolio Management (Service Strategy)
- IT Financial Management (Service Strategy)
- Service Level Management (Service Design)
- Incident Management (Service Operations)
- Problem Management (Service Operations)
- Request Management (Service Operations)
- Configuration Management (Service Transition)
- Change Management (Service Transition)

By enabling and supporting these processes, SACM contributes to:

- Planning and proactive management of IT to support the needs of the business.
- Financial traceability—the ability to understand where the IT budget is being spent and in support of which business drivers. This also supports better financial decision making in general and

specifically determining if the IT budget is truly supporting the important business services that drive the company's revenue stream.

- Maintaining appropriate service levels to support the business adequately IT should not over-deliver, which is expensive and wasteful, or under-deliver, which inhibits the business from producing better results. SACM provides the data points and transparency to more accurately meet business needs.
- Enabling services to be operated effectively and efficiently
- Populating and managing the Configuration Management Database (CMDB)—discovering and recording all the relevant components that comprise the IT environment
- Providing a process for on-boarding Assets and CIs—managing them throughout their respective life cycles and retiring them in an organized manner to minimize the negative impact on the business
- Improving the understanding of the complex interdependencies between the various components of IT and reducing the negative impact they may have on each other
- Standardizing IT environments, resulting in reducing maintenance costs and improving consistency and predictability of IT outcomes

SACM provides these values to the business throughout the entire service life cycle, from request through procurement to deployment into the IT environment, management of the service in production, and ending at the retirement and disposal phases. SACM is responsible for creating and managing the Configuration Management System (CMS) and as such provides IT organizations with more control over their IT environments, better adherence to the policies it defines, and greater accessibility to the necessary information. SACM does so by delivering the following:

- Management and planning: Designing what level of configuration management is needed and how this level will be achieved
- Configuration identification: Establishing a system of classification of Configuration Items (CIs) into types, defining the relevant attributes for each CI type, determining the key attributes and the relationships between the various CI types
- Configuration Control: Governing the addition, removal and updating of each CI and ensuring that the appropriate process and procedures are followed for each such activity
- Status accounting and reporting: Providing an accurate account of the status of each CI/Asset
- Verification and audit: Conducting periodical audits to ensure that there are no discrepancies between the documented and/or desired state of the environment and the actual state

## SACM Solution

HP Service Asset and Configuration Management (SACM) Solution provides the necessary data foundation that is core to operating IT. This guide presents a set of commonly encountered use cases that are the basis of every SACM process implementation.

The working components in the SACM Solution include:

- **HP Service Manager (SM)**, focuses on the Change Management, Request Management, and Service Catalog modules.
  - Change Management module handles the infrastructure changes that impact multiple users or business units.
  - Request Management module handles infrastructure changes mainly affecting one user—typically items such as reset user password, issue a personal computer replacement, and so on.
  - Service Catalog module allows the end user to submit requests that will be routed to the appropriate fulfillment mechanism.
- **HP Asset Manager (AM)**, focuses on the Procurement module and the Portfolio Management module.
  - Procurement module facilitates activities around request, purchase, and reception of new managed assets, while keeping track of related financial transactions.
  - Portfolio Management module manages the entire portfolio of IT-related assets throughout their life cycle—from the Procurement phase all the way through to the Decommission/Disposal phase—allowing their management according to their type (for instance, handling a pack of paper for a printer versus a database server).
- **HP Universal CMDB (UCMDB)**, enables tasks related to Configuration Management.

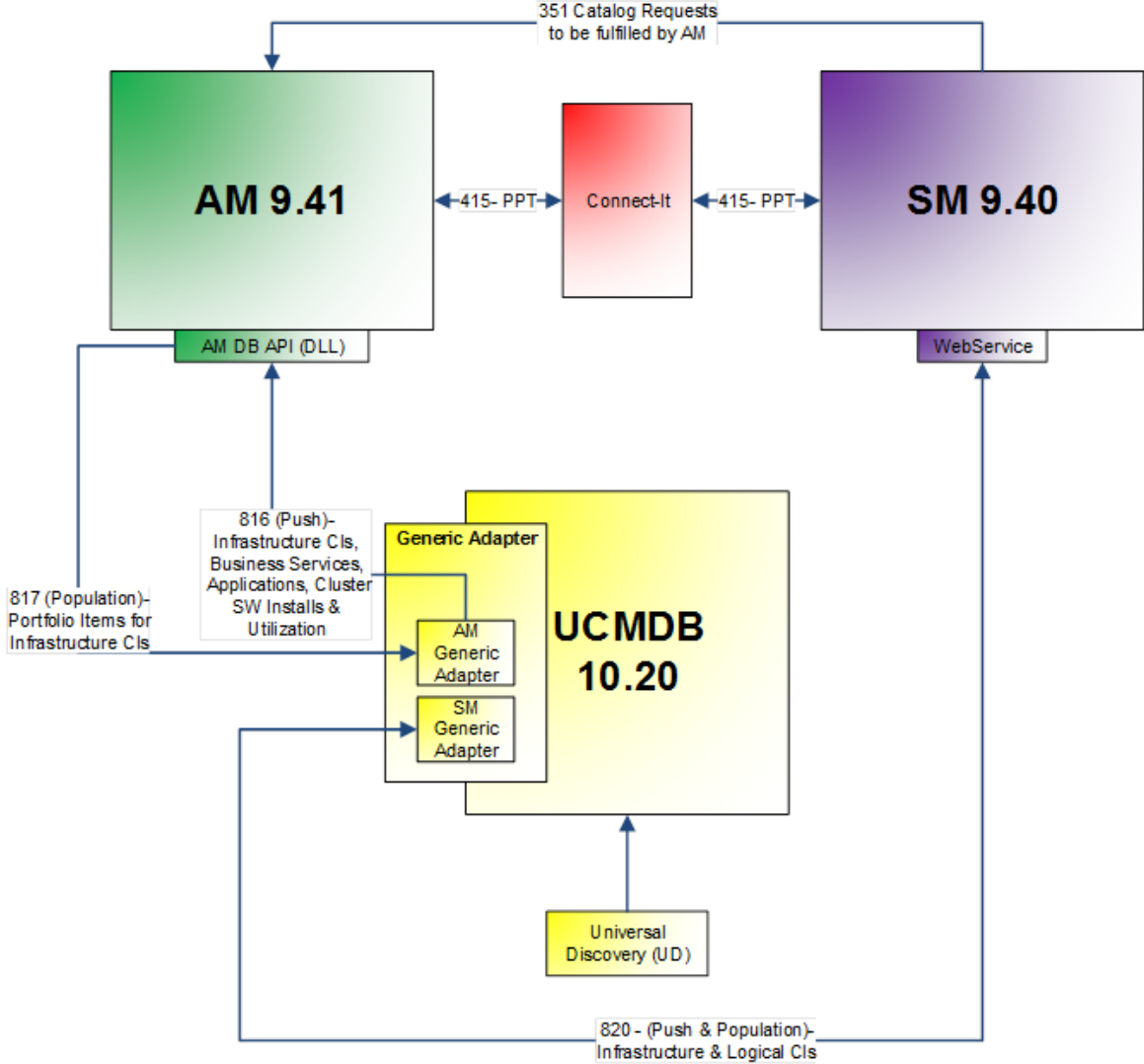
An IT asset that is a part of a business service is considered a configuration item (CI). The relations between this asset and the business services that depend on it determine its possible impact. Those relations are defined in UCMDB and are synchronized with Service Manager to assist in Incident/Problem/Change Management tasks, and with Asset Manager to allow financial tracking for physical, virtual, and software assets and the corresponding business services.

- **HP Connect-IT**, the Enterprise synchronization tool, allows data integration between Service Manager and Asset Manager in SACM solution.
- **HP Universal Discovery (HP UD)**, helps your IT team map configurations and inventory hardware, network devices, clusters, applications, and middleware in traditional, virtualized, and cloud environments. HP UD is recommended for SACM use cases as it enriches the data existing in UCMDB that will then propagate to Service Manager and Asset Manager.

**Note:** For deployment and configuration instructions, see the HP Service Asset and Configuration Management Solution Configuration Guide.

# Core SACM 9.40 Solution Diagram

The following diagram displays the various data flows of the Core SACM Solution:



## What's New in SACM 9.40

The following features are introduced in SACM 9.40.

- Generic push and population adapters
- Graphic mapping tool
- Centralized CI class model synchronization between UCMDb and Service Manager
- Embedded UCMDb Browser widgets in Service Manager

## Data Flow in Core SACM Solution

The products that facilitate the SACM process all contain different subsets of the enterprise data. This includes information about physical and virtual entities such as company employees, offices, and owned hardware, as well as logical structures such as business services, contracts, or software licenses.

As seen in the "[Core SACM 9.40 Solution Diagram](#)" on page 12, most of the integrations revolve around synchronizing those subsets of data across the products.

UCMDB holds data related to CIs. It is used to define relationships between the physical entities such as servers, printers, or network switches, and logical structures such as business applications. This enables the user to understand the relations and assess the impact that changes performed and CI outages that occur may have on the business—for example, the dependence of the email business service on the state and accessibility of Microsoft Exchange Server. The CI data is synchronized with the Asset Management system where the financial aspects of owning and operating the corresponding assets are tracked. There are two adapter types that are used to synchronize information between UCMDB and Asset Manager; one type for each direction—one for pushing from UCMDB to Asset Manager and the other for pulling information from Asset Manager to UCMDB.

In turn, UCMDB synchronizes CIs and relationship data with Service Manager in order to enable service management processes. This includes Incident, Problem, and Change Management. This is achieved by the UCMDB-SM integration, which uses a single UCMDB-SM Integration adapter that supports both pulling information from SM into UCMDB and pushing from UCMDB to SM.

Asset Manager and Service Manager deal with common entities from different perspectives. To facilitate this, a synchronization process is needed that is sometimes referred to as People, Places, and Things (PPT). Several Connect-IT scenarios are offered with the SACM scenario package that handles this synchronization, while offering different directionalities for the synchronization. The specific direction is decided according to current and planned implementation states. The simplest form for new implementations is to have all PPT data originate in Asset Manager and synchronize with Service Manager on a scheduled basis. This is done by configuring the **amsm-ppt.scn** scenario. Additional types of data synchronized between Asset Manager and Service Manager are the Service Manager Catalog orders, which generate procurement requests for catalog requests that require additional assets, and Service Manager Changes or Change tasks, which translate into Asset Manager work orders.

When planning a new deployment of the SACM Solution, consider the direction in which the data flows. It will depend on the current state of the customer's implementation.

Specifically regarding the UCMDB integration with Service Manager, the best practice generally recommends using the Population feature to bring non-discoverable CIs from Service Manager into UCMDB, while using Discovery capabilities to bring in discoverable CI data. It can be pushed into Service Manager later.

There is a special use case when deploying a new UCMDB environment to an already populated Service Manager implementation where the customer would use Population to import discoverable CIs from Service Manager into UCMDB. It is recommended to execute this as a one-time on-boarding project, after which those CIs are managed in UCMDB.

For more information, see Chapter 4 "Standards and Best Practices" in the [HP Service Manager - Universal CMDB Integration Guide](#).

## User Roles

The main user roles in the SACM core story line are as follows:

**Note:** Depending on the existing organization, the roles can overlap, be fulfilled by more than one person (for larger organizations), or the same person can perform more than one role.

- **Application Owner**

Responsible for the technical aspects of maintaining defined levels of availability and performance of applications. Also responsible for managing the resolution of problems, as well as the provisioning and configuration of the application.

- **Asset Management Coordinator**

Responsible for registration of IT Assets at the appropriate phase in their life cycle in order to enable other processes such as Configuration Management and Change Management.

- **Asset Management Inventory Manager**

Responsible for registration of IT assets in the Asset Management database. Maintains the up-to-date status of stocks and inventories.

- **Change Management Team**

Since the way the Change Management process is implemented can vary significantly between organizations (even within the organization depending on the Change type), we use the generic roles of Change Coordinator and Change Analyst.

- **Change Coordinator**

Responsible for initial registering of Changes, applying the relevant Change model, coordinating activities related to the Change, and relying on the Change Analyst to carry out Change implementation tasks.

- **Change Analyst**

Builds, tests, and implements changes according to the change plan by fulfilling change tasks.

- **Configuration Item Owner**

Responsible for the technical aspects of maintaining defined levels of availability and performance of a configuration item (CI) or a group of CIs. Also responsible for managing the resolution of problems, as well as the provisioning and configuration of the CI/CI group.

- **Configuration Manager**

Responsible for preparing and making the necessary information about the IT infrastructure and services available for service management. To do this, the Configuration Manager maintains a logical model containing the components of the IT infrastructure (CIs) and their associations. Also responsible for maintaining the rules and the process of promoting CIs from the Actual State to the Authorized State.

- **Discovery Manager**

Responsible for configuration and maintenance of automated Discovery of the IT landscape.

- **End User**

Primary user of the service.

- **IT Finance Manager**

Responsible for the review and approval of purchase requests within the current budget constraints.

- **Service Desk Agent**

Responsible for registering interactions based on contacts with users, registering requests for change (RFC) based on registered interactions, and providing status updates to the users upon request or status change.

- **Service Owner**

Responsible for maintaining defined levels of availability and performance of an application. Also responsible for notifying the customers of issues, as well as validating that these issues are handled and resolved according to Service Level Agreements (SLA).



## Terms and Definitions

- **Actual State**

Current physical and logical state of the IT Infrastructure.

Includes both the attribute values and relationships between all components of the IT Infrastructure.

- **Asset**

Any resource or capability that could contribute to the delivery of a service where ownership and financial value can be tracked and access can be controlled.

Can be any of the following types: Process, Information, Knowledge, Applications Infrastructure, or Financial Capital.

- **Authorized State**

Organization's approved physical and logical state for the IT Infrastructure.

- **Business Process**

Process that is owned and carried out by the business.

Contributes to the delivery of a product or service to a customer of the business.

- **Business Service**

Service that is delivered to customers of the business by business units.

IT service that directly supports a Business Process.

- **Configuration Item (CI)**

Any component that needs to be managed in order to deliver an IT service.

- **IT Infrastructure**

Collection of all configuration items, their attributes and relationships, that compose the IT environment and that are the building blocks that are necessary for all provided IT services.

- **Purchase Request**

Document generated by an internal or external organization to notify the purchasing department of items it needs to order. In the SACM Solution, the purchase request is issued in Asset Manager.

- **Federation**

Process of bringing data together in a single virtual location for on-demand application access. In the SACM Solution's context, the actual CI data is held in UCMDB and is available for Service Manager users.

# SACM Customer Scenarios

This chapter illustrates three core use cases.

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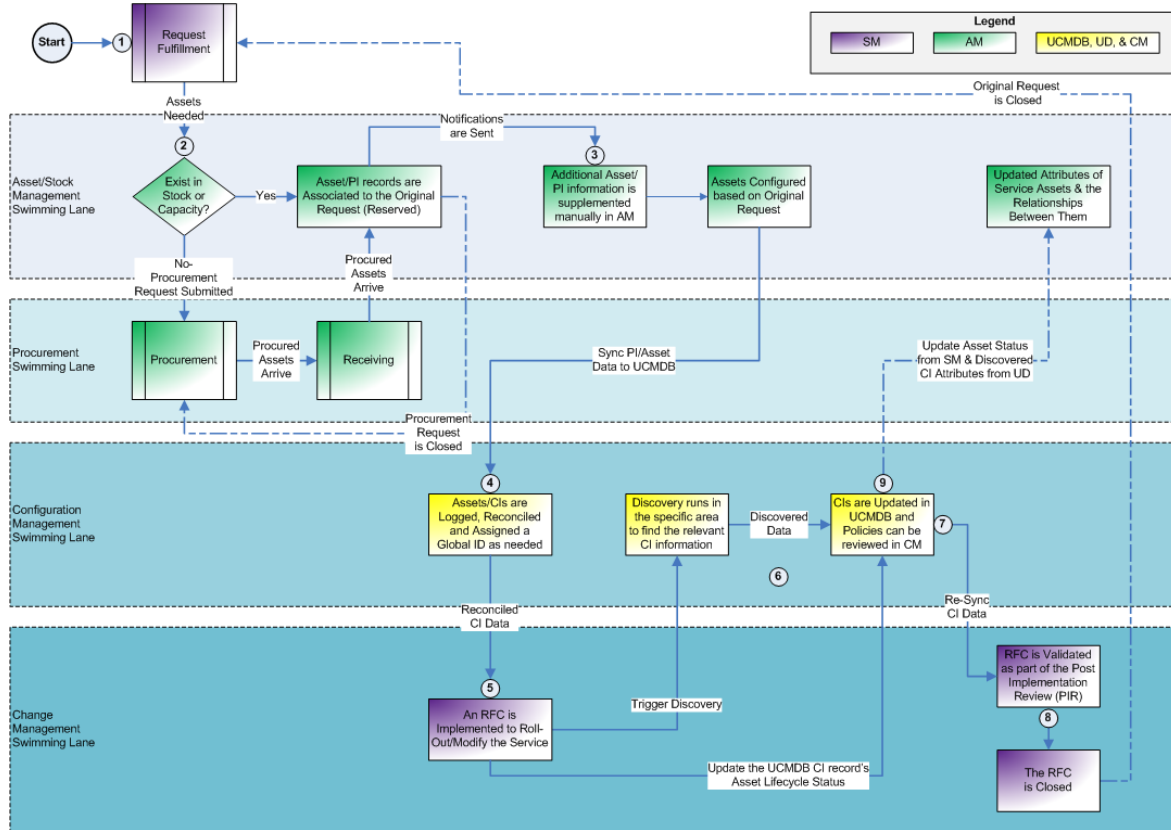
## New Service Instantiation/Subscription

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## New Service Instantiation Flow Diagram

The following diagram illustrates the New Service Instantiation use case.



## New Service Instantiation Core Use Case

### 1. Catalog Request submission :

- The requestor adds all catalog items they require to their shopping cart and completes the order process by checking out the cart.
- Any requests that can be fulfilled within Service Manager (SM) request fulfillment generates the relevant requests in SM. Requests that require assets are routed to Asset Manager (AM) for their fulfillment.

### 2. Providing assets to fulfill the request:

- The request for assets is evaluated and, if there are sufficient assets in stock, these are allocated to the request.
- If there are not enough available assets, the procurement process is invoked. As part of the

procurement process, the necessary purchase orders are generated and sent to vendors.

- Procured assets arrive. They are received, logged in AM, and reserved for the original request that warranted the procurement of these assets.
3. Asset records are enriched:
    - In order to facilitate identification and reconciliation in later phases, sufficient information (discoverable attributes) must be provided to the AM record before this record can be consumed by other products.
  4. Adding CIs to the UCMDB:
    - Asset/PI records are replicated to Universal CMDB (UCMDB). UCMDB tries to reconcile these records with the records already logged in UCMDB. If these are new CIs, then there is no match in UCMDB and new CI records are created in UCMDB.
  5. Adding CIs to SM:
    - UCMDB replicates the newly created CI records to SM so that they can be referenced throughout the Service Management processes in general and specifically in Change Management in the form of a Request for Change (RFC) in order to introduce the CIs into the IT environment.
  6. SM RFC implementation:
    - CIs are introduced into the IT environment. The SM RFC is updated and progressed to the Change Validation phase.
    - UD Discovery is triggered and discovered data is populated in UCMDB. Specifically the CI asset status is updated to reflect that it is now "in use".
    - UCMDB reconciles between the discovered data and the previously populated data (one such example being AM).
  7. Updating CI data in SM:
    - UCMDB replicates the newly updated CI data to SM.
    - The RFC is validated using SM and UCMDB Configuration Manager (UCMDB-CM) and is closed.
  8. Closure:
    - SM RFC is closed, as is the associated SM request that originated from the catalog.
  9. Asset Status Update:
    - UCMDB syncs the asset status and relevant discovered attributes to AM.

## New Service Instantiation/Subscription Examples

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### Issue New Laptop Computer for Employee

This use case begins with an end user logging on to the Employee Self-Service (ESS) catalog. In the ESS catalog, the user locates the laptop model to order and adds it to the shopping cart.

Once an order is submitted, it is synchronized with Asset Manager as a purchase request.

The next person to handle this request is the Asset Management Coordinator. The purchase request is reviewed and the available stocks are checked for availability of the requested item.

If the required laptop model is available in stock, it is assigned to the corresponding user and the request is fulfilled. A scheduled synchronization updates the original Catalog order. A configuration item (CI) representing the laptop is created in UCMDb. The data is passed from there to Service Manager.

#### To issue a new laptop computer to an employee:

1. Log on to the Service Manager ESS catalog. Locate the desired item in the catalog—either by searching for it or by selecting it from available categories. Add it to the cart and proceed to checkout. This creates an interaction in Service Manager that is synchronized as a purchase request in Asset Manager.
2. Log on to Asset Manager and review the purchase requests. Requests originated from the Service Manager ESS Catalog will have an (out-of-the-box) **ESS-SDxxxxx** prefix.
3. Process the request according to the Asset Management workflow. If the requested assets exist in stock, assign them and mark the request satisfied. If not, begin the Procurement life cycle, which ends with the requested item in stock.
4. Once the request is satisfied, its status will be reflected in Service Manager by a scheduled Connect-It scenario.
5. The above-mentioned asset must have specific attributes populated in order to be eligible to synchronize with UCMDb and be reconciled with Universal Discovery data. For Computer CI, the requirement is that the status of the portfolio item in Asset Manager is **In stock** or **In use**, and the **amComputer:ComputerType** field has a value corresponding to an existing mapping. The UCMDb-AM Population job is scheduled and runs, synchronizing the data between UCMDb and

Asset Manager. An Asset CI is created in UCMDB and linked to the new CI.

For details, see Appendix A, "Technical Reference" in the *SACM Solution Configuration Guide*.

## New Exchange Account

This use case begins with an end user submitting an order in the ESS catalog to create an Exchange account for testing purposes.

Once the order is submitted, it is synchronized with Asset Manager as a purchase request, and validated by the Asset Management coordinator. He verifies that there are enough Exchange licenses left in the pool, creates the account, and updates the pool usage.

Once the account has been created and reserved for the corresponding user, the request is fulfilled and the original Service Order is updated.

## New Exchange Service

This use case begins with an end user requesting a new instance of an Exchange service, complete with a server (physical or virtual), a software installation and configuration, and corresponding licenses.

Since this is not a standard request—it does not exist in the catalog—this means the end user must submit the request detailing the required functionality. The Service Desk agent reviews the request and escalates it as a request for change. Using the information in the RFC as a reference, a Change record is created and linked to the RFC. The affected service—in this case, an email—and the new (not-yet-existing) Exchange instance will be part of a generic email business service. During the Change Analysis and Planning phase, the required Change tasks are created, which include procurement of necessary equipment and software licenses, as well as actual tasks of installing and configuring the required components.

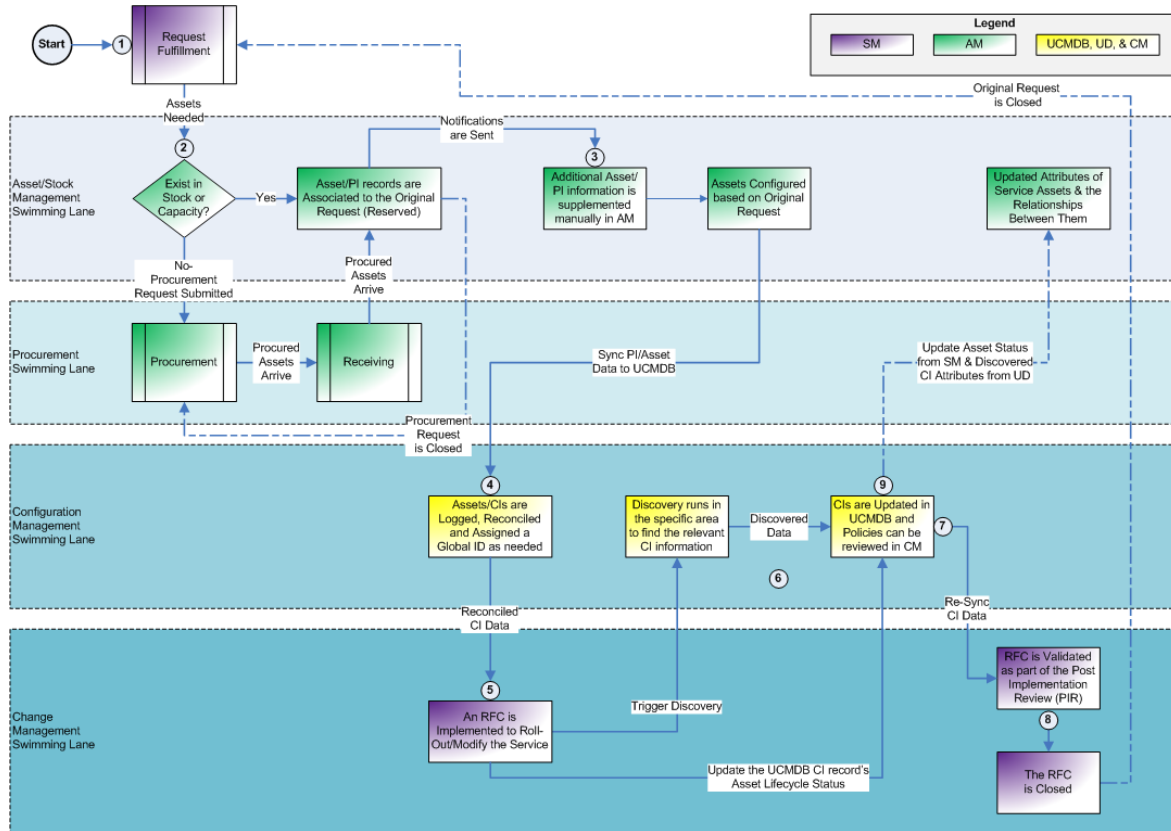
# Modifying an Existing Instance

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## Modify an Existing Instance Flow Diagram

The following diagram illustrates the modification of an existing Service Instance.





## Modify an Existing Service Instance Core Use Case

1. Service Request submission :
  - A request is submitted to modify an existing service instance.
  - Aspects of the request that require assets are routed to Asset Manager for their fulfillment.
2. Providing assets to fulfill the request:
  - The request for assets is evaluated and, if there are sufficient assets in stock, these are allocated to the request.
  - If there are not enough available assets, the procurement process is invoked. As part of the procurement process, the necessary purchase orders are generated and sent to vendors.
  - Procured assets arrive. They are received, logged in AM, and reserved for the original request that warranted the procurement of these assets.
3. Asset records are enriched:
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8. Closure:
- SM RFC is closed, as is the associated SM request that originated from the catalog.
9. Asset Status Update:
- UCMDB syncs the asset status and relevant discovered attributes to AM.

## Modify Existing Service Examples

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### Add RAM to an Existing Laptop

An employee requests a RAM upgrade by opening an Employee Self-Service (ESS) catalog request.

1. The fulfilling body (in this case, IT) reviews the request.
2. Since the request describes the need to obtain the RAM module and install it in a target computer, the request must include two lines—procurement of the RAM module and the installation work order. The request can be satisfied only when this has been accomplished.
3. The appropriate technician carries out the work order and it is marked complete.
4. Asset Management Coordinator modifies the asset details manually in Asset Manager.
5. Upon completion, Asset Manager updates the initial request.
6. Service Manager synchronizes the updated request status.

**Note:** If HP Universal Delivery is set up to discover Desktop inventory, the next scheduled scan will update the new laptop configuration details in UCMDB.

## Increase Existing Database Tablespace

In anticipation of the increasing need for database space, the application owner submits a Change request to increase the database tablespace. The Change Management process takes place, including Change Assessment and Planning.

1. During the Change Planning phase, the storage situation is assessed. If there is a need to purchase additional storage, a corresponding request is filed in Asset Manager.
2. When the required storage is purchased and operational, the operation of increasing tablespace is executed according to the Change schedule.

**Note:** The actual implementation of the Change can be automated. For more information, see the "CCRM Extension Story – Change Process with Automation" in the *HP Change Configuration and Release Management (CCRM) Solution Concept Guide*.

3. After the Change is executed and verified, it is closed.

## Change Exchange Service SLA

The Service Level Agreement (SLA) for the Microsoft Exchange Service needs to be increased. This means the production environment needs to be changed to satisfy the required level of service.

1. A Change record is created, which details the required alteration to the service.

During the Change Planning and Assessment phase, it is clear that the deployment should be changed by adding additional servers for load distribution and high availability for all involved components. The list of Change tasks is built, which includes procuring the needed servers, installing the required software on them, and configuring the hardware and software (for example, the Load Balancer settings).

2. In UCMDB, the service model is updated to reflect the new service architecture.
3. Once all Change tasks are completed, the entire Change is assessed and the service level is updated in Service Manager.

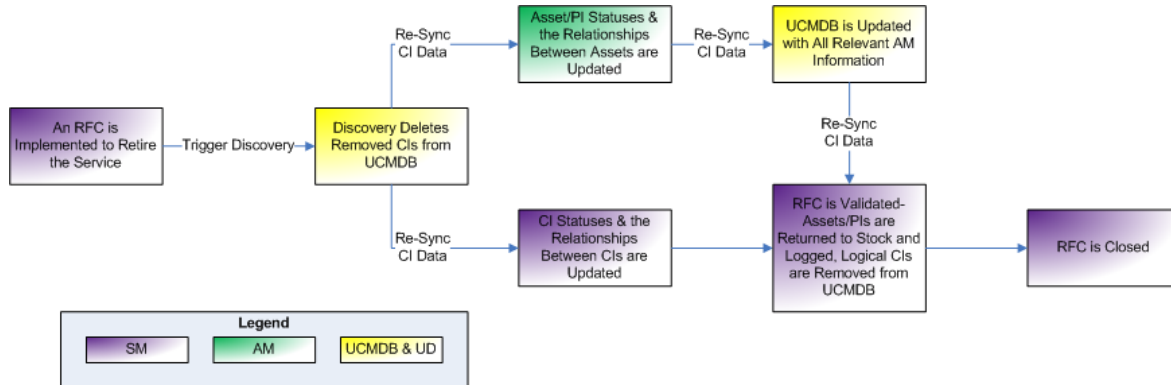
## Retiring a Service Instance Flow

This task includes:

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### Retire a Service Instance Flow Diagram

The following diagram illustrates the retirement of an existing Service Instance.



### Retire a Service Instance Core Use Case

- Service Request submission :
  - A request is submitted to retire an existing service instance. This generates an RFC in SM to retire the Service.
- SM RFC implementation:
  - When the relevant CIs are removed from the IT environment, the SM RFC is updated and progressed to the Change Validation phase.
  - UD Discovery is triggered and discovered data is populated in UCMDB, specifically marking the CIs to reflect that they have been removed from the environment.
- Updating CI data in SM:

- UCMDB replicates the newly updated CI data to SM.
  - The RFC is validated using SM, UCMDB-CM and AM in order to assure that all assets that should have been reclaimed (returned to stock) are accounted for.
4. Closure:
- SM RFC is closed, as is the associated SM request that originated from the catalog.
5. Asset Status Update:
- UCMDB syncs the asset status and relevant discovered attributes to AM.

## Cancel Subscription Examples

**This section includes:**

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### Laptop: Return Hardware (optional disposal)

1. To return an IT issued laptop, the end user submits a request in Service Manager.
2. The interaction is escalated to an RFC.
3. This serves as the base for a Change request detailing the required activities.
4. This is synchronized with Asset Manager as a work order. Once the Asset Management representative collects the laptop from the end user, the work order is marked complete.
5. The ownership of the user is removed from the asset record. Depending on company policy, the laptop can either be sent for disposal or returned to stock for another employee.

### Cancel Exchange Account

When the project ends and the testing Exchange account is no longer needed, it should be canceled and the license returned to the license pool.

1. The end user informs the Service Desk Agent that the testing Exchange account is no longer required.
2. Service Desk Agent creates an RFC to cancel the account.
3. Based on information in the RFC, Change Coordinator creates a Change record.

4. Change record is synchronized as a work order to Asset Manager.
5. Asset Management Coordinator cancels the account, updates the license usage, and sends a confirmation to Change Coordinator.
6. Change record is marked complete.
7. Service Desk Agent updates the end user with the status.

## Retire Service

At some point in time, a service gets to the phase when it needs to be retired. For a complex service like Microsoft Exchange mail service, this requires completing multiple tasks in a specific order.

1. Service Owner contacts Change Coordinator, who files a Change record to retire the service.
2. After a series of approvals and planning, a list of Change tasks is built. The list includes all the needed activities to retire the service. This list includes, but is not limited to:
  - a. Inform the subscribed users about plans to cancel the service.
  - b. Stop the service on all running instances.
  - c. Remove assignment of all resources to the service. Configuration Manager updates Service Model in UCMDB.
  - d. Return hardware assets to the appropriate stock. This is a task for Asset Management Inventory Manager.
  - e. Update software license usage. This is done automatically by scheduled Discovery.
3. Once all Change tasks are implemented, the Change is assessed and closed. The service is removed from UCMDB, and marked **Retired/Consumed** in Asset Manager and Service Manager.