



**TRANSITION**  
TECHNOLOGIES

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# **Get started on Asset and Configuration Management**

First things first! What are asset and configuration management? Both are practices designed to help you understand what key business objects you own and how they're being used, so you can make better decisions, improve the efficiency of various processes, and ultimately, save the business money.

There are a few common questions around asset and configuration management:

- How are asset and configuration management different from each other?
- What's the typical journey when starting with asset and configuration management?
- What is an asset versus a configuration item?
- Can I use one tool for both asset and configuration management?

## **A quick look at IT asset management**

IT asset management (ITAM) is the act of ensuring an organization's IT assets are accounted for, deployed, maintained, upgraded, and disposed of when the time comes. The goal is to optimize the spending and usage of all assets to ensure the best return on investment for your organization.

Because the term "asset" is so broad, IT asset management is often spread out among many different systems and people. When important asset-related data isn't centralized, the result is misinformation, inaccuracies, and time delays. This kind of environment isn't conducive to making informed decisions or meeting compliance standards.

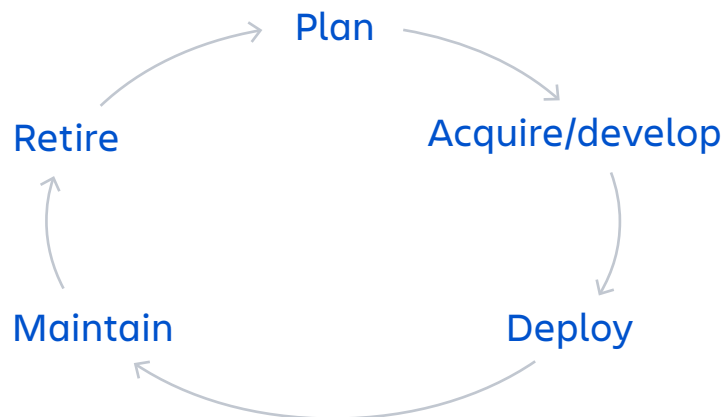
Quality ITAM practices will give you a solid grasp on your inventory to help with the day-to-day management of assets, their financials, and completing audits and compliance checks.

**i** An asset is anything that is valuable enough to your business that you want to track it. Common IT assets include:

- Laptops
- Servers
- Phones
- Monitors
- Software
- Databases

The same asset management principles can apply to non-IT assets. We often see items like office equipment, buildings, vehicles, contracts, and vendors being stored as assets too.

Information tracked by ITAM systems often includes financial data, contracts, asset owners, locations, and lifecycle statuses. While the exact number of statuses and the names may vary company to company, the IT asset management lifecycle often looks similar to this:



Later, we'll show how IT asset management supports other ITSM practices, such as request, portfolio, and knowledge management.

## The basics of configuration management

Configuration management is focused on the specifics of how an asset is set up and used, and how it relates to other assets. In the context of configuration management assets are known as configuration items (CIs). But not all assets are CIs and vice versa (more on that in just a moment).

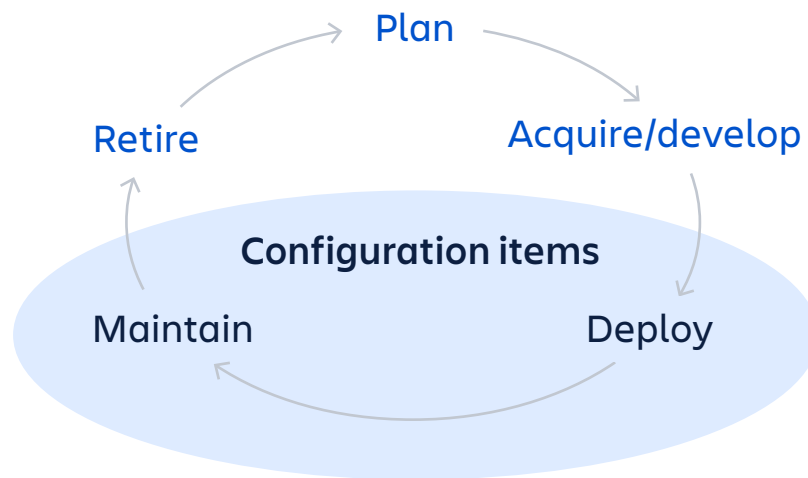
**i** Examples of IT configuration items include:

- Laptops
- Servers
- Virtual machines
- Software
- Network adapters
- Databases

Just like with assets, configuration items can expand beyond IT. Examples include employees, office meeting rooms, vendors, and more.



The goal of configuration management is to build up an understanding of how your IT infrastructure is running to better support any issues that occur with it. Configuration management broadly cares about assets in the deploy and maintain parts of their lifecycle. A simple way of thinking of the difference between asset and configuration management is: asset management is keeping track of what you have from a financial governance perspective and what it's used for, configuration management is keeping track of how it's doing what it's doing.



Configuration management is implemented using a configuration management database (CMDB). This is a database in which your CIs are stored but also the relationships between them. For example a server (a CI) will run some business service, it will be running a specific operating system, and it will depend on certain databases and file locations. Depending how you set up your CMDB, the business service, OS, databases, and file locations could all be their own CIs that are linked to the server CI. Or they could just be attributes for your server CI.

## A modern take: service configuration management

A number of shifts in the IT world have caused configuration management to adapt. Firstly, the service-first mentality continues to grow. Secondly, there's more and more cloud services and the rate of change of technology is becoming faster. Consequently, documenting every single configuration setting of physical hardware has become more time consuming, less valuable, and at times completely redundant.



Instead, a new practice has evolved – service configuration management. The act of taking the configuration management practice described above and applying it to IT (and if you like non-IT) services. In service configuration management your services are your top level CIs in your CMDB, and other documented CIs support those business services in some way. These could be hosts, file locations, application software, databases, people, cloud services, etc. Whatever a service needs to run.

This type of configuration information provides key context into your services to help you plan, coordinate, support, and report on your organization's services. Both ITIL 4 and Forrester have identified service configuration management as being absolutely key for ITSM in the modern organization for this reason.

That's not to say you can't store your physical hardware as CIs and log everything down to the racks and cables. If doing so produces a tangible value to your business then go ahead. But for the purposes of this handbook we'll focus on service specific configuration management as that's where we see the most value for organizations.

Further on, we'll discuss the specifics of how service configuration management, and the context it provides, can support ITSM practices such as change, incident, problem, and portfolio management.

## So where do I begin?

Should you begin with ITAM or service configuration management? Or both? No handbook can say for certain which is best for your organization to start with.

Here are some common questions a company might ask to give you some inspiration of where to start. Which questions come up most for you? Which answers take the longest to find out? What answers cost your organization the most if you don't have them?

IT asset management	Service configuration management
What type of IT devices are important for us to track and manage?	What are the top services that are important to our business?
What do we need to understand about our IT devices to track them effectively?	Who manages these services?
What do we need to track when onboarding and offboarding employees and contractors?	What percentage of services are deployed to the cloud (AWS, Azure, Google etc.)?
What types of software licenses do we track (cloud vs physical)? Do we have a good understanding of the subscription license purchased versus assigned?	Do we have a good understanding of the service taxonomy (the supporting service applications and infrastructure)?
How can leadership and IT teams find the total assets deployed, the ratio of used vs purchased license etc. to make key business decisions?	What types of information do we need to track to support audit and compliance requirements?

If you can't easily answer these questions, then you likely have blindspots in your asset and service configuration oversight. If you have unused licenses, maybe you're paying too much for your software agreement. If you're not sure which operating systems you have running, how do you make sure every device is updated if there's a security patch required?

Our recommendation is to list out your problems and questions. This will then inform what data you need to answer your questions and therefore solve your problems. You can then prioritize solving these problems based on the value it will bring to the business and ease of implementation. It's often most sensible to start with the high value and easier to implement solutions.

In our experience, the majority of companies follow a similar pattern. They start with documenting their inventory, move on to tracking the lifecycle and usage of that inventory with IT asset management, and then start to look at the current status of, and connections between, their assets with service configuration management. Usually service configuration management depends on accurate asset information. Similarly, asset management depends on up to date inventory records.



**i** Inventory management tracks the levels of stock you have for various items. Often you'll store where the items are located, how much they cost to purchase, and a few other basic details.

Inventory management can be used to answer questions like:

- How many cables do we have in stock?
- Do we need to purchase new assets?
- How much will they cost?
- Where are our physical assets?

We won't go into inventory management in this handbook as most organizations are doing this at some level and the vast majority of asset management tools can track stock levels. Inventory management can be thought of as one component of IT asset management.



## What's the difference between assets and CIs?

This is a common question and the answer is that it's all about how you're looking at the object in question. As a rule of thumb, if you're tracking that something exists, its cost, and that it's being used for its intended purpose, it's an asset. If you're tracking how it's set up or related to something else, it's a CI. And if you're tracking both it's an asset and CI.

For example a server is an IT asset but for managing your services you will likely want some configuration information such as what services it's running, the OS, whether it's a production or staging system etc.

Not all assets are CIs and not all CIs are assets. A monitor is an asset, it has a lifecycle and a monetary value worth tracking. But it's unlikely you want to know how it's configured. On the other side, a file location isn't an asset. But it's absolutely a CI if you need to know about it because it supports a service.

Can be just assets	Can be assets and CIs	Can be just CIs
Monitor	Server	Internal applications
Projector	Operating system	Clusters
Cables	Microsoft Office	File locations

**i** Our advice would be to settle on a terminology that suits your organisation. Some companies call everything an asset and won't see a hard distinction between asset information and configuration information. Other organizations make a definite split, especially if they use different tools for asset management and configuration management.

It's worth noting, many organisations set a minimum price for what counts as an official asset such as it must be over 400 dollars. This means that items like mice, keyboards, and video adapters would not be tracked as assets or CIs.






## Can I store assets and CIs in the same tool?

In our experience, modern and flexible CMDB tools are often designed to be asset repositories too so then you can store both asset and configuration information about an object in one place. There's a lot of benefits to storing everything in one tool. One database keeps things simple for users, often reduces cost, and means all the data you might need is easily accessible in the same way.

**i** For this handbook, we will use the term CMDB to mean a database that can store both assets and configuration items and their relevant attributes.

### Confluence-prod-app1

Edit Comment More Relationship graph

Name	 Confluence-prod-app1
Status	<b>RUNNING</b>
Environment	 Production
Operating system	 CentOS 7
Cost	 \$1799
Location	 London
Asset status	<b>DEPLOYED</b>

Usually asset management repositories will only do asset management. But CMDBs can do both depending on the vendor. Always check to see if your chosen CMDB supports both asset and configuration data.

## Ready to boost your ITSM practices?

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