

CONFIGURATION MANAGEMENT

Process

The Configuration Management process consists of four procedures.

The first procedure is called "CI Registration". This procedure is used by configuration managers when they register new [CIs](#) in the [CMDB](#).

The second procedure is called "Supplier Information Maintenance". Configuration managers use this procedure when they register new suppliers and when they update the contact details of previously registered suppliers.

The third procedure is called "CI Update". It is used by configuration managers when they update the attributes and/or relations of CIs that were already registered in the CMDB.

The fourth procedure is called "Support Contract Administration". It is used by configuration managers when they register or update the support contracts for the CIs registered in the CMDB.

For more details about these procedures, click on the Process button to return to the graphical representation of this process and click on the box that represents the procedure that you would like to know more about. The graphical representation of this procedure will appear and you will be able to click on the Description button in the upper left-hand corner of your screen to read more about it.

Mission

The mission of the Configuration Management process is to make the relevant information about the infrastructure available to the other service management processes in an accurate, complete, and timely fashion.

Scope

The scope of the Configuration Management process is limited to the configuration item ([CI](#)) categories listed in the table below, and the maintenance and/or support contracts that cover the CIs that fall within these categories.

Category	Code	Category	Code
Card	CRD	Rack/Cabinet	RCK
Database	DBS	Router	RTR
Digital Camera	CAM	Scanner	SCN
Disk Array	DAR	Server	SVR
Disk Controller	DCT	Software	n/a
Disk Drive	DDR	Software License	LIC
Docking Station	DST	Software Package for Distribution	PCK
Documentation	DOC	Software/Interface Configuration Settings	SCS

Emergency Power Generator	EPG	Switch	SWT
Hub	HUB	Tape Array	TAR
Mainframe	MFR	Tape Controller	TCT
Mainframe Partition	MFP	Tape Drive	TDR
Modem	MOD	Tape Robot	TRB
Monitor	MON	Terminal	TML
Patch Panel	PPA	Uninterrupted Power Supply	UPS
Personal Digital Assistant	PDA	WAN Link	LNK
Printer/Multifunction	PRT	Web Site	WBS
Projector	PRJ	Workstation	WKS

Level of Detail

The level of detail in which Configuration Management information is to be registered is specified in the field utilization guidelines for the fields of the forms that are available in the service management application for the support of this process.

The following forms are available in the service management application for the Configuration Management process:

[Configuration Item](#)

[Contract](#)

[Organization](#)

[Address](#)

Click on a form to obtain the field utilization guidelines for each of its fields.

Roles & Responsibilities

The table below presents the only role that plays a part in the Configuration Management process, along with its responsibilities. Click on the role to review its profile.

Role	Responsibility
Configuration manager	<p>Keeps the information of the CIs, for which the group of the configuration manager is responsible, up to date.</p> <p>Maintains the information of external organizations that have supplied, or support, CIs for which the group of the configuration manager is responsible.</p> <p>Registers and updates the support contracts for the CIs for which the configuration manager's group is responsible.</p> <p>Maintains the links of the CIs that the configuration manager's group is responsible for. These are the links between a CI and other CIs, its supplier, its support contract, and the service infrastructures that it is a part of.</p>

Key Performance Indicators

The table below lists the key performance indicators ([KPIs](#)) that have been selected for tracking the success of the Configuration Management process.

KPI	Definition	Frequency	Unit
Unregistered CIs	<p>The number of support requests by group that were linked to the special CI with the code NORECORD.</p> <p>Note: The special CI with the code NORECORD is linked to support requests by service desk agents and specialists when they cannot find the appropriate CI in the database even though the CI should have been registered.</p>	Monthly	# of support requests
Hardware CIs without supplier	The number of hardware CIs that do not have a supplier organization linked to them.	Monthly	# of CIs

Beneficiaries

The roles that rely on the Configuration Management process are listed in the table below, along with their respective requirements for the Configuration Management process.

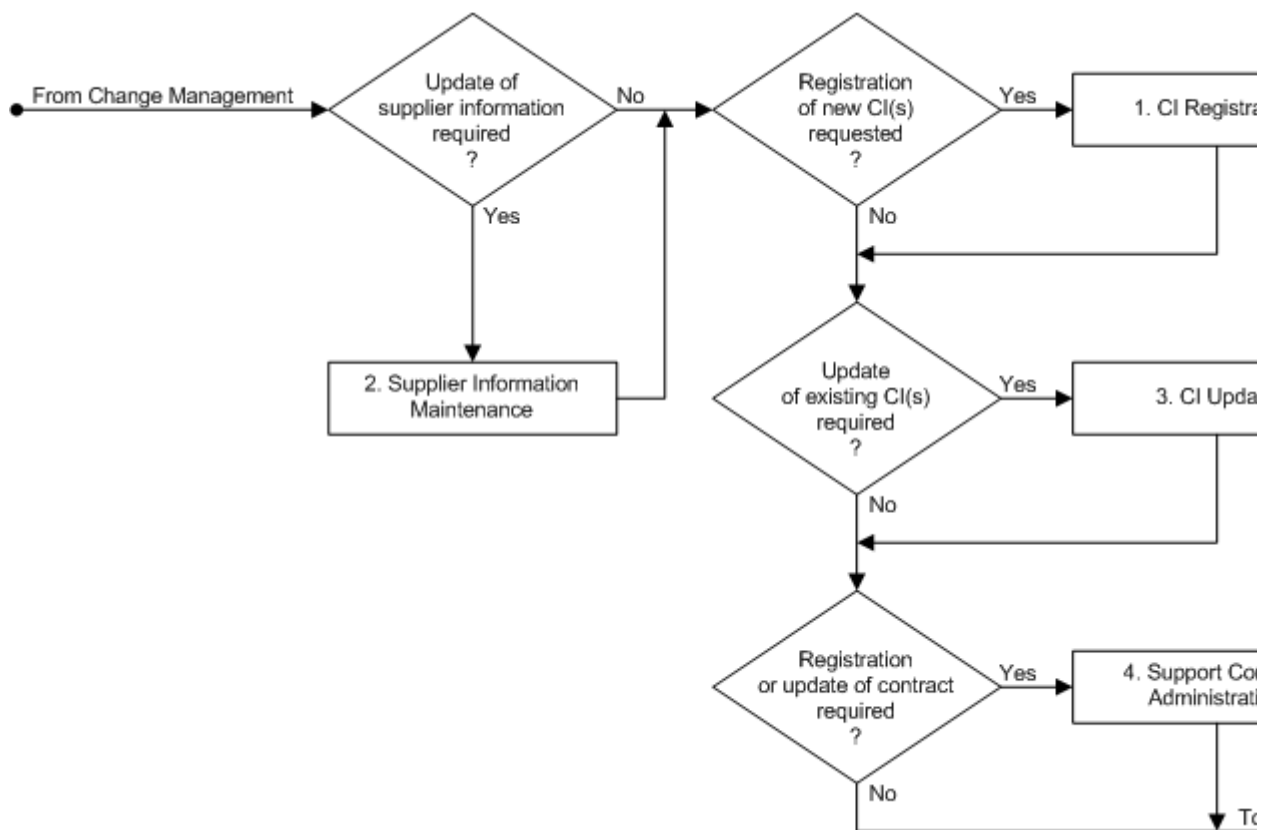
Beneficiary	Requirement
Change coordinators	Availability of CIs within the service management application so that they can be linked to work orders when CIs are to be changed.
Configuration managers	Availability of CIs within the service management application so that they can be linked together to create a representation of the infrastructure.
Controllers	Financial information about CIs, and the link between CIs and the services that they support, to determine the cost of services.
Problem managers	Information regarding CIs that have caused incidents to facilitate the detection of problems in the infrastructure.
Service desk agents	<p>Availability of CIs within the service management application so that they can be linked to support requests.</p> <p>Information regarding CIs and CI relations to facilitate the resolution of support requests, and to assist with the assignment of requests to the correct group.</p>
Specialists	<p>Information regarding CIs and CI relations to facilitate the resolution of support requests, the identification of root causes, and the completion of work orders.</p> <p>Contact details of suppliers so that they can be contacted when their assistance is needed to resolve support requests, to identify root causes and to propose structural solutions for problems, and to complete work orders for change implementations.</p>

Owner

The owner of the Configuration Management process is the Service Management [CAB](#).

This CAB is responsible for reviewing, and subsequently approving or rejecting, requests for improvement of the Configuration Management process and its supporting functionality in the service management application.

Process



Procedure 1, CI Registration

Whenever new configuration items ([CIs](#)) that fall within the [scope](#) of the Configuration Management process are added to the infrastructure, they are registered in the configuration management database ([CMDB](#)) of the service management application. The attributes of these CIs and their relations with other CIs, [services](#) and support contracts are also maintained in the CMDB. The task of maintaining the CMDB information is performed by the configuration managers of the groups that are responsible for the CIs.

The work orders for updating the CMDB are assigned to configuration managers by change coordinators when new CIs have been ordered, when existing CIs have changed, or when a support contract needs to be added or updated.

After such a work order has been assigned to a configuration manager, he/she reviews its details. The configuration manager goes directly to [Procedure 3, CI Update](#) if the work order does not request any new CI(s) to be added to the CMDB.

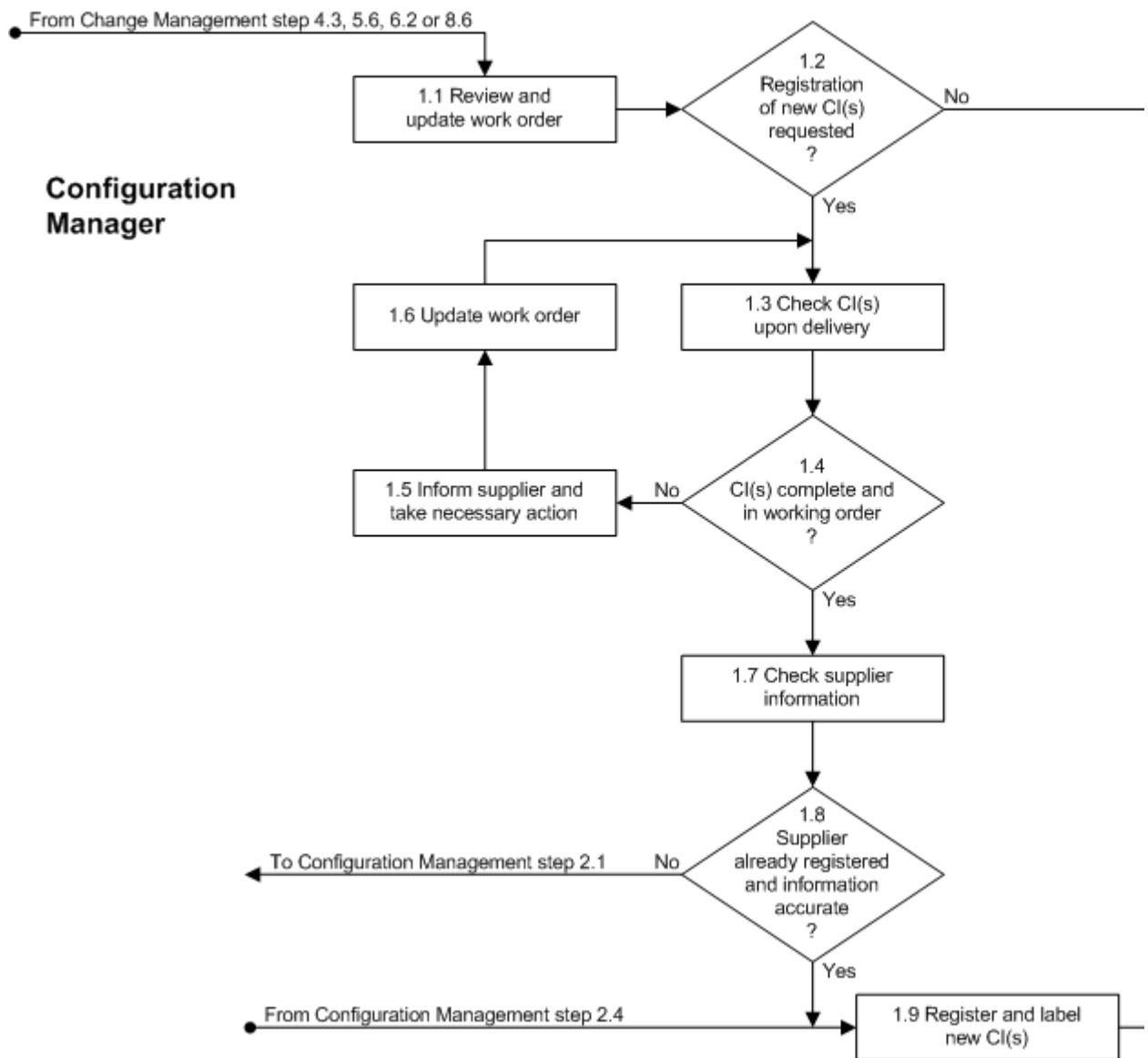
If new CI(s) are to be registered, however, the configuration manager checks the CI(s) after they have been delivered to ensure that the correct hardware and/or software has been received, that no items are missing, and

that the CI(s) are not damaged. If the delivery is not whole, the configuration manager informs the supplier and subsequently informs the change coordinator of the delay by updating the associated work order.

Conversely, if the CI(s) have been received in good condition, the configuration manager checks the service management application to see if the contact details of the supplier are up-to-date. If the supplier of the CI(s) has not yet been registered, or if its contact details are no longer up-to-date, the configuration manager ensures that the supplier information is registered or updated in [Procedure 2, Supplier Information Maintenance](#).

After this, he/she registers each new CI in the CMDB and links it to other CIs and [services](#) as needed. All this is done in accordance with the [field utilization guidelines](#) for CIs. If hardware was delivered, the configuration manager attaches a label with the CI's code to each new hardware CI.

Procedure 1, CI Registration



Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: auto;">1.1 Review and update work order</div>	<p>1.1.1 When the value in the Status field of your work order for the CMDB update has changed from "Registered" to "Assigned", open it and read the instructions in the Information field.</p> <p>1.1.2 Set the Status field of the work order to "Accepted" if you are not yet ready to start working on it.</p> <p>1.1.3 As soon as you are ready to work on the work order, set its Status field to "In Progress".</p>

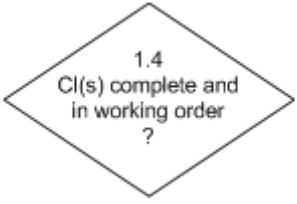
Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 10px; width: fit-content; margin: auto;"> <p style="text-align: center;">1.2 Registration of new CI(s) requested ?</p> </div>	<p>1.2.1 If the registration of new CI(s) has been requested, continue with 1.3.1. Otherwise go to 3.1.1.</p>

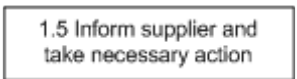
Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: auto;">1.3 Check CI(s) upon delivery</div>	<p>1.3.1 Unpack the delivery and ensure that it contains the correct hardware and/or software, that no items are missing, and that the CI(s) are in working order.</p>


Work Instructions

Procedure Step	Work Instructions for Configuration Managers
 <p>1.4 CI(s) complete and in working order ?</p>	<p>1.4.1 If the delivery is complete and contains the correct CI(s), and if the CI(s) are in working order, go to 1.7.1. Otherwise continue with 1.5.1.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
 <p>1.5 Inform supplier and take necessary action</p>	<p>1.5.1 Inform the supplier of the issue with the delivery. Ask the supplier what needs to be done in order for the issue to be resolved.</p> <p>1.5.2 Take the necessary actions based on the instructions from the supplier. For example, put the defect or incorrectly delivered CI(s) back in their box and return them to the supplier, or wait for the missing CI(s) to be delivered.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
 <p>1.6 Update work order</p>	<p>1.6.1 Specify in the Information update field of the work order what was wrong with the delivery and what was done to correct the situation.</p> <p>1.6.2 Set the Status field of the work order to "Waiting for...".</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
1.7 Check supplier information	1.7.1 Use the service management application to check the information registered for the organization that supplied the CI(s) .

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
1.8 Supplier already registered and information accurate ?	1.8.1 If the supplier of the CI(s) is not yet registered in the service management application, or if this supplier's information is no longer up to date, go to 2.1.1. Otherwise continue with 1.9.1.

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
1.9 Register and label new CI(s)	<p>1.9.1 Register the new CI(s). Link each new CI to other CIs and to services as needed. Do this by following the field utilization guidelines for CIs.</p> <p>1.9.2 For each new hardware CI, print the CI's code on a label. Attach each label to the CI in such a way that it is clearly visible.</p>

Procedure 2, Supplier Information Maintenance

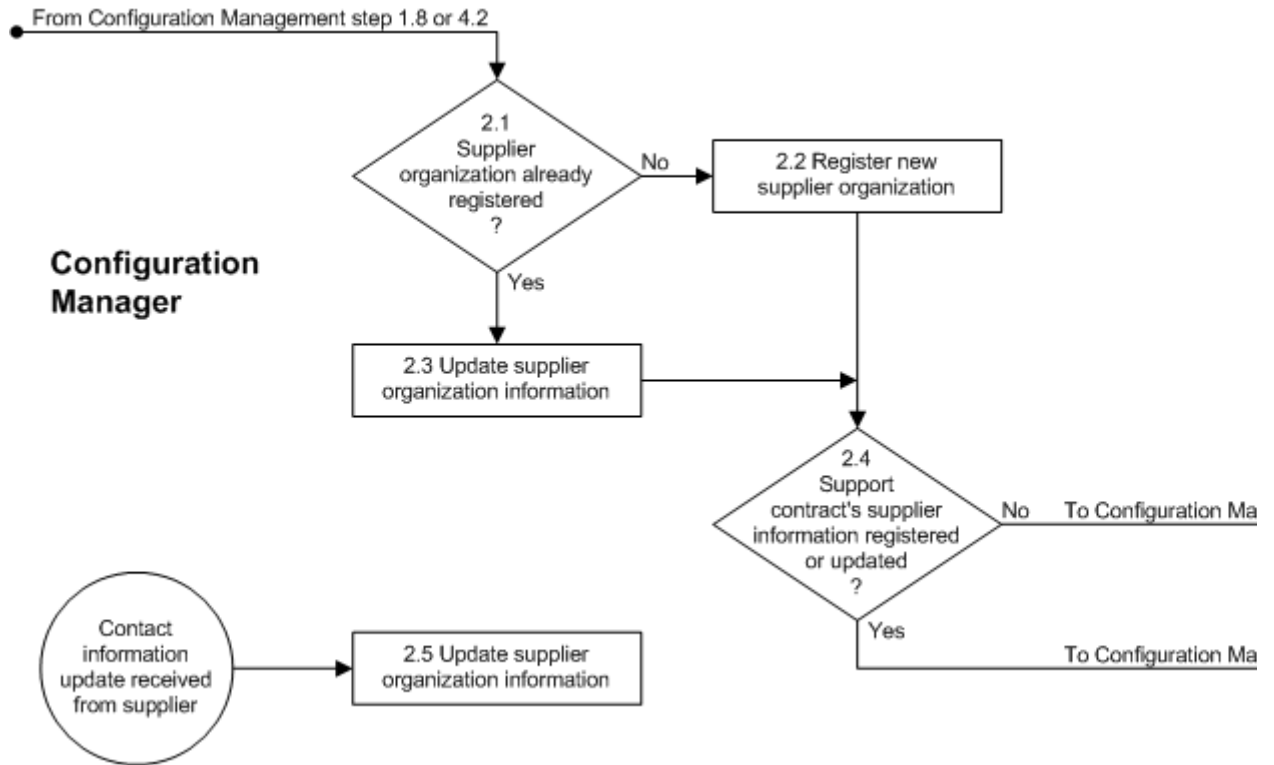
The configuration managers are responsible for registering and updating the information of organizations that supply [configuration items](#) and/or [support](#) to the service provider organization.

A configuration manager performs the supplier information maintenance tasks as needed before registering new [configuration items](#), before registering or updating support contracts, and whenever updated contact information has been received from an existing supplier.


If a supplier organization is not already registered, the configuration manager adds it. If the supplier organization

already exists in the service management application, the configuration manager updates its contact details. This is done in accordance with the field utilization guidelines for [organizations](#) and [addresses](#).

Procedure 2, Supplier Information Maintenance



Work Instructions

Procedure Step	Work Instructions for Configuration Managers
	2.1.1 If the supplier organization of the new CI(s) or of the support contract is already registered in the service management application, go to 2.3.1. Otherwise continue with 2.2.1.

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 5px; width: fit-content;">2.2 Register new supplier organization</div>	<p>2.2.1 Register the new supplier organization and enter its information by following the field utilization guidelines for organizations.</p> <p>2.2.2 Use the field utilization guidelines for addresses when adding the address(es) of the new supplier organization.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 5px; width: fit-content;">2.3 Update supplier organization information</div>	<p>2.3.1 Update the existing supplier organization's information by following the field utilization guidelines for organizations.</p> <p>2.3.2 Use the field utilization guidelines for addresses when updating the existing, or adding the new, address(es) of the supplier organization.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 10px; width: fit-content; text-align: center;"> <p>2.4 Support contract's supplier information registered or updated ?</p> </div>	<p>2.4.1 If the information of a support contract supplier was registered or updated, go to Configuration Management 4.3.1. Otherwise, if the information of a CI's supplier was registered or updated, go to Configuration Management 1.9.1.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;">2.5 Update supplier organization information</div>	<p>2.5.1 After having received updated contact information from an existing supplier, update this supplier organization's information in accordance with the field utilization guidelines for organizations.</p> <p>2.5.2 Use the field utilization guidelines for addresses when updating the existing, or adding the new, address(es) of the supplier organization.</p>

Procedure 3, CI Update

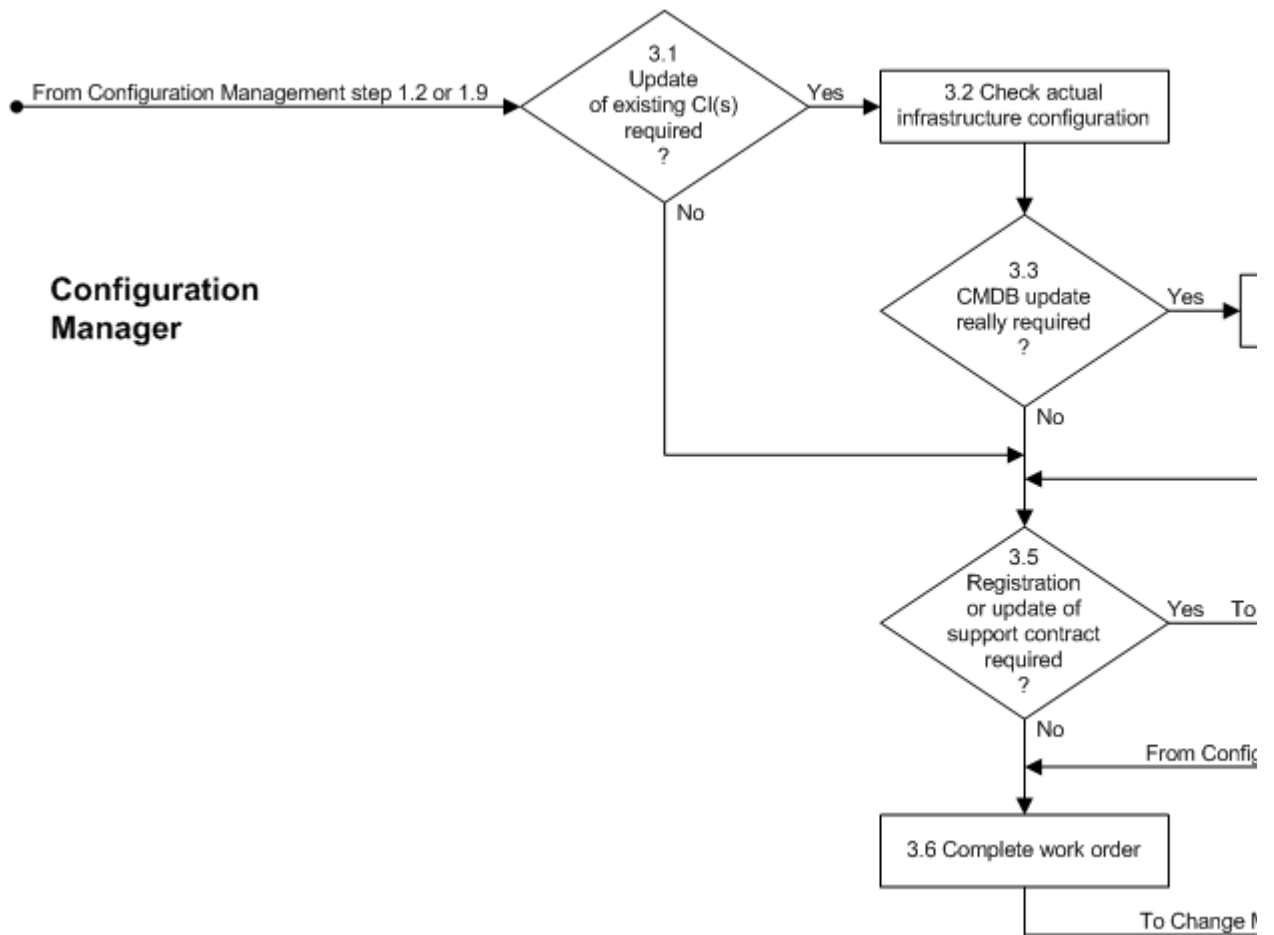
When the configuration manager is dealing with a work order requesting the update of [CI](#) attributes and/or relations, he/she checks the actual configuration of the infrastructure to confirm that the requested [CMDB](#) modifications are really required to bring the CMDB back up-to-date.

If it turns out that the CMDB should not be updated, the work order is updated by the configuration manager with the reason why the CMDB update is not required. If, on the other hand, it turns out that the CMDB should be updated, the configuration manager performs the update of the necessary CI attributes and/or relations. This is done in accordance with the [field utilization guidelines](#) for CIs.


If the work order requests the registration of a new, or the update of an existing, support contract, the configuration manager does this by following [Procedure 4, Support Contract Administration](#).

Having completed the CMDB update, the configuration manager updates the work order with a summary of the modifications that were made in the CMDB.

Procedure 3, CI Update



Work Instructions

Procedure Step	Work Instructions for Configuration Managers
	<p>3.1.1 If, in addition to the registration of the new CI(s), an update of previously registered CI information is required, continue with 3.2.1. Otherwise go to 3.5.1.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 5px; width: fit-content;">3.2 Check actual infrastructure configuration</div>	<p>3.2.1 Check the current configuration of the infrastructure (by using remote monitoring tools whenever possible) and gather all information necessary to perform the requested update of the CMDB.</p> <p>3.2.2 Compare the gathered information with the information registered in the CMDB to determine if an update is really required.</p>


Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 10px; width: fit-content; text-align: center;"> <p>3.3 CMDB update really required ?</p> </div>	<p>3.3.1 If an update of the CMDB is really required, continue with 3.4.1. Otherwise go to 3.5.1.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 5px; width: fit-content;">3.4 Adjust CI attribute(s) and/or relation(s)</div>	<p>3.4.1 Update the necessary attribute information in the CMDB. Also add or remove links to services and between CIs as needed. Do this by following the field utilization guidelines for CIs.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
 <p>3.5 Registration or update of support contract required ?</p>	<p>3.5.1 If a new support contract needs to be registered, or if an existing support contract needs to be updated, go to 4.1.1. Otherwise continue with 3.6.1.</p> <p>Note: The relations between CIs and support contracts can be maintained in 3.4.1 where the link between a CI and a contract can be created or removed from the CI form. It is also possible, however, to add or remove the links between multiple CIs and a support contract from the support contract form in 4.4.1 or 4.5.1. The configuration manager can decide which is more efficient on a case-by-case basis.</p>

Work Instructions

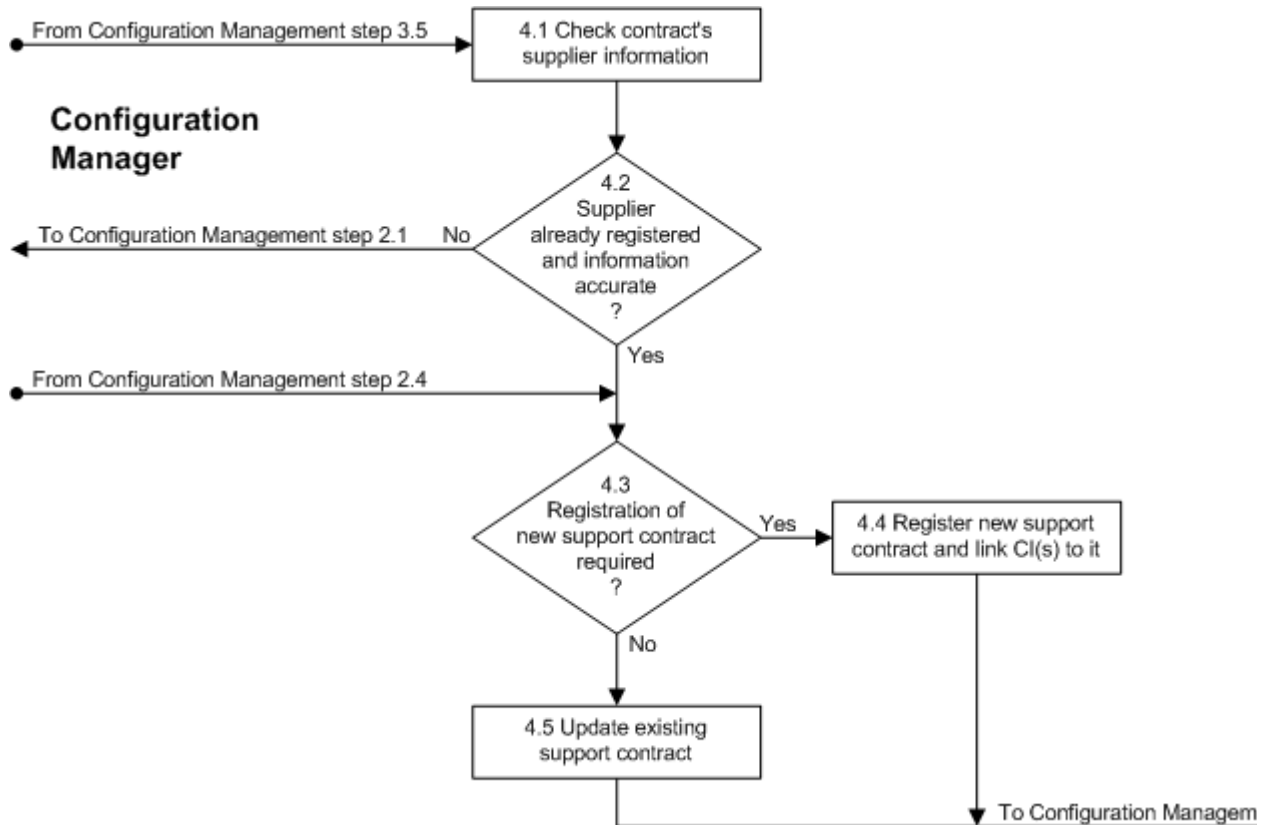
Procedure Step	Work Instructions for Configuration Managers
<div data-bbox="236 1115 533 1189" style="border: 1px solid black; padding: 5px; width: fit-content;">3.6 Complete work order</div>	<p>3.6.1 Specify in the Result field of the work order what has been changed in the CMDB and/or support contract information.</p> <p>Note: If neither the CI information nor the support contract information needed to be updated, specify in the Result field of the work order why the requested update was not required.</p> <p>3.6.2 Set the Status field of the work order to "Completed".</p>

Procedure 4, Support Contract Administration

Before registering a new, or updating an existing, support contract, the configuration manager first ensures that the contact details of the support contract's supplier exist. If the supplier organization of the support contract has already been registered, the configuration administrator checks the registered contact details to see if they are still up to date. If the support contract's supplier has not yet been registered, or if its contact details are no longer up to date, the configuration manager ensures that the supplier information is registered or updated by following [Procedure 2, Supplier Information Maintenance](#).

Having ensured that the contact details of the support contract's supplier are registered and up to date, the configuration manager registers or updates the support contract in accordance with the [field utilization guidelines](#) for contracts.

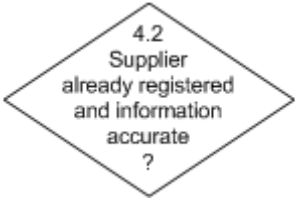
Procedure 4, Support Contract Administration




Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 5px; width: fit-content;">4.1 Check contract's supplier information</div>	<p>4.1.1 If a new support contract needs to be registered, check to see whether the supplier of the support contract has already been registered in the service management application. If so, check whether the contact information of this supplier is still accurate and complete.</p> <p>4.1.2 If a support contract needs to be updated, open it and check whether the contact information of the support contract's supplier is still accurate and complete.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
 <p>4.2 Supplier already registered and information accurate ?</p>	<p>4.2.1 If the support contract's supplier is not yet registered in the service management application, or if this supplier's information is no longer up to date, go to 2.1.1. Otherwise continue with 4.3.1.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
 <p>4.3 Registration of new support contract required ?</p>	<p>4.3.1 If the registration of a new support contract is required, continue with 4.4.1. Otherwise go to 4.5.1.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 5px; width: fit-content;"> <p>4.4 Register new support contract and link CI(s) to it</p> </div>	<p>4.4.1 Register the new support contract and link CIs to it as needed. Do this in accordance with the field utilization guidelines for contracts.</p>

Work Instructions

Procedure Step	Work Instructions for Configuration Managers
<div style="border: 1px solid black; padding: 5px; width: fit-content;"> <p>4.5 Update existing support contract</p> </div>	<p>4.5.1 Update the existing support contract information. Also, add or remove links between the contract and CIs as needed. Do all this by following the field</p>

[utilization guidelines](#) for contracts.

Configuration Item

The table below lists the fields of the Configuration Item form and provides utilization guidelines for each field.

Page	Main	
Field	Utilization	
Status	Use this field to select the appropriate status for this configuration item from the following list of options:	
	Ordered	A formal request for the CI has been submitted, but the CI has not yet been delivered or the development of the CI has not yet started.
	Being Developed	The in-house development of the CI has started, but is not yet finished.
	In Stock	The CI has not yet been, or is no longer, deployed for use by any person, or for the provision of any service, but is available for this when the need arises. Note that the CI does not necessarily need to be located in a storage room.
	Reserved	The CIs has not yet been, or is no longer, deployed, but is planned to be deployed for a specific (group of) person(s), or for the provision of a specific service. The CI may only be deployed for its planned purpose.
	Installed	The hard- or software CI has been placed or stored at the location where it is going to be used, but has not yet been taken into production.
	Being Tested	The CI is being subjected to tests. Note that a test server, which is being used to test a software release, should have the status "In Production". The software release, however, should have the status "Being Tested".
	Standby for Continuity	The CI is available for, and not used for any other purpose than, the replacement of a production CI when this is considered the most efficient way to avoid, or resolve, a

	<p>service outage.</p> <p>Note that the CI may not be located at the same site as the CI that it is to replace.</p> <p>In Production The CI is currently deployed for use by a specific (group of) person(s), or for the provision of a specific service.</p> <p>Lent Out The CI has temporarily been borrowed by a specific (group of) person(s).</p> <p>Undergoing Maintenance It is temporarily not possible to use the CI because it is undergoing preventative maintenance.</p> <p>Broken Down The CI cannot be used because it does not work. No effort is currently being made to get the CI fixed.</p> <p>Being Repaired The CI cannot be used because it does not work and has been sent out for repair, or work has been started to fix it.</p> <p>Written Off or Archived The CI is no longer used by a specific (group of) person(s), or for the provision of a specific service, and may not be re-deployed. The service provider organization is still responsible for this CI.</p> <p>Lost or Stolen The CI can no longer be found and its removal or destruction was not coordinated by the Change Management process.</p> <p>Removed The service provider organization no longer bears any responsibility for the CI. This status normally applies when the CI has physically been removed from the service provider's site or after it has been destroyed.</p>
	Separator
Code	<p>Use this field to enter the code of the configuration item (CI). For most CIs, create the CI code as follows:</p> <p>First, enter the code of the service provider organization (e.g. HQS for the "Headquarters Services" service provider organization). Next, enter a hyphen, followed by the three-character CI category code (e.g. SVR for a server, or WKS for a workstation). A complete list of CI category codes can be found in the Configuration Management process scope. Lastly, enter the next available number for this prefix that you just created, using 5 positions.</p> <p>Examples: HQS-WKS12345 for a workstation of the "Headquarters Services" service provider organization, or ITSS-PRT12345 for a printer of the "IT Sales Support" service provider organization.</p> <p>For software, enter the generally accepted acronym or abbreviation of the software name, followed by the version number without full stops.</p> <p>Examples: WINDOWS-XPPROSP1 - Microsoft Windows XP Professional SP1 READER60 - Adobe Reader 6.0</p>

	SERVICEDESK45SP7 - HP OpenView Service Desk 4.5 SP7
Name	<p>Use this field to enter the name of the configuration item (CI). For hardware, use the following syntax to construct the name: <Brand> <Model> <optional information> <category></p> <p>Note that for a server, the <optional information> should describe the server's function.</p> <p>Examples: HP OmniBook XT6050 laptop workstation HP 9000 RP7410 SAP production server HP LaserJet 2500n color printer HP ScanJet 8200 flatbed scanner</p> <p>For software, use the following syntax to construct the name: <Brand> <Software name> <version number></p> <p>Examples: Microsoft Windows XP Professional SP1 Adobe Reader 6.0 HP OpenView Service Desk 4.5 SP7</p> <p>For software licenses, use the following syntax to construct the name: <Brand> <Software name> <range of versions covered> license</p> <p>Example: Microsoft Office 2000 Premium & 2003 Professional license</p> <p>For web sites, the title of the home page should be filled out in this field.</p>
System ID	<p>If it concerns a hardware configuration item (CI), use this field to enter its full canonical (or network) name, if it can be connected to the network (e.g. nychqsr1234.us.com). If it concerns a database, use this field to enter its unique name.</p> <p>In case of a software CI, use this field to enter its unique identifier by which it is known in the automatic discovery tool, if it is registered in such a tool. When the CI is a software package, use this field to enter its unique identifier by which it is known by the distribution software. For a web site, enter its URL in this field (e.g. https://intranet.us/).</p> <p>Do not use this field in any other case.</p>
	Separator
Brand	Use this field to select the manufacturer of the configuration item.
Model/Version	Use this field to enter the version if it concerns a software CI. Use this field to enter the model if it concerns a hardware CI. Use this field to enter the versions that the license covers if it concerns a software license.
Category	<p>Use this field to select the appropriate category of the configuration item from the following list of options:</p> <ul style="list-style-type: none"> Card Database Digital Camera Disk Array Disk Controller Disk Drive

	<p>Docking Station</p> <p>Documentation</p> <p>Emergency Power Generator</p> <p>Hub</p> <p>Mainframe</p> <p>Mainframe Partition</p> <p>Modem</p> <p>Monitor</p> <p>Other Type of Hardware</p> <p>Patch Panel</p> <p>Personal Digital Assistant</p> <p>Printer/Multifunction</p> <p>Projector</p> <p>Rack/Cabinet</p> <p>Router</p> <p>Scanner</p> <p>Server</p> <p>Software</p> <p>Software License</p> <p>Software Package for Distribution</p> <p>Software/Interface Configuration Settings</p> <p>Switch</p> <p>Tape Array</p> <p>Tape Controller</p> <p>Tape Drive</p> <p>Tape Robot</p> <p>Terminal</p> <p>Uninterrupted Power Supply</p> <p>WAN Link</p> <p>Web Site</p> <p>Workstation</p>
<p>Subcategory</p>	<p>Use this field to select the appropriate subcategory of the configuration item from the list of options presented below. Note that this field only allows subcategories to be selected that are relevant for the selected category.</p> <p>The following options are available for the category "Workstation":</p> <ul style="list-style-type: none"> Desktop Laptop <p>The following options are available for the category "Printer/Multifunction":</p> <ul style="list-style-type: none"> Inkjet Printer Label Printer Laser Printer Matrix Printer Pen Plotter Wax Printer <p>The following options are available for the category "Terminal":</p> <ul style="list-style-type: none"> Text Terminal X-terminal <p>The following options are available for the category "Modem":</p> <ul style="list-style-type: none"> Analog Telephone Modem

Base Band Modem
DSL Modem
Fiber Optic Modem
ISDN Modem

The following options are available for the category "Disk Drive":

CD-ROM Drive
CD-ROM Writer
DVD Drive
DVD Writer
Floppy Disk Drive
Hard Disk Drive
Jaz Drive
Zip Drive
Other Type of Disk Drive

The following options are available for the category "Tape Drive":

1/4 inch
1/2 inch
4 mm
8 mm
Other Type of Tape Drive

The following options are available for the category "Router":

Access Router
Remote Access Server

The following options are available for the category "Switch":

Data Switch
Voice Switch (PBX)
Other Type of Switch

The following options are available for the category "Card":

LAN Card
Network Interface Card
Processor Card
Voice Card
WAN Card
Other Type of Card

The following options are available for the category "Document":

Installation Manual
Process Document
Technical Manual
User Manual
Other Type of Document

The following options are available for the category "Software License":

Concurrent User License
Installed User License
Named User License
Temporary User License
Unlimited User License

	<p>The following options are available for the category "Software":</p> <ul style="list-style-type: none"> Backup/Recovery Software Browser/Viewer Application Communication/Data Exchange Software Compression Software Contact Management Application Database Software Financial/Resource Planning Application Network/System (Management) Software Operating System Software Scheduling Software Security Software Software Development Software/Tool Software Suite User Productivity Application Web Server/Search Engine Software Other Type of Software
	Separator
Site	Use this field to select the facility at which the configuration item is located. Set this field to "N/A" if the category equals "Database", "Software", "Software License", "Software Package for Distribution", "Software/Interface Configuration Settings", or "Web Site".
Location	Use this field to enter the name or number of the room in which the configuration items is located. This field is not available for the categories "Database", "Software", "Software License", "Software Package for Distribution", "Software/Interface Configuration Settings", or "Web Site".
	Separator
Administrator	Use this field to select the group responsible for supporting the configuration item and maintaining its information in the configuration management database (CMDB).
	Separator
Remarks	Use this field to enter any additional information about this configuration item that could prove useful.
	Separator
Folder	This field is automatically set to the folder of the configuration manager's organization.
Page	Details
Field	Utilization
Processor	Use this field to select the type of processor of the server or

	<p>workstation from the following list of options:</p> <ul style="list-style-type: none"> Alpha AS/400 Athlon Celeron Celeron D Itanium Itanium 2 Opteron PA-RISC Pentium Pentium D Pentium Pro Pentium MMX Pentium II Pentium II Xeon Pentium III Pentium III Xeon Pentium 4 PowerPC G3 (750) PowerPC G4 (7400) PowerPC G5 (970) RS/6000 Sempron SPARC VAX Xeon Other Type of Processor <p>This field is only available for the categories "Server" and "Workstation".</p>
No. of processors	<p>Use this field to enter the number of processors. This field is only available for the categories "Server" and "Workstation".</p>
Speed (MHz)	<p>Use this field to enter the speed of the processor(s). This field is only available for the categories "Server" and "Workstation".</p>
RAM (MB)	<p>Use this field to enter the amount of internal memory. This field is only available for the categories "Server", "Workstation" and "Printer/Multifunction".</p>
Disk capacity (GB)	<p>Use this field to enter the amount of data that can be stored on the disk drive. In the case of a workstation or a server, this refers to the internal hard disk drive. This field is only available for the categories "Disk Drive", "Server", "Workstation" and "Web Site".</p>
Array allocation (GB)	<p>Use this field to enter the amount of storage capacity that has been allocated to the server on a disk array. This field is only available for the category "Server".</p>
	Separator
Resolution	<p>Use this field to select the maximum resolution of the terminal, monitor, or projector from the following list of options:</p>

	<p>640x480 Pixels 800x600 Pixels 1024x768 Pixels 1280x1024 Pixels 1600x1200 Pixels Monochrome Monitor</p> <p>This field is only available for the categories "Terminal", "Monitor" and "Projector".</p>
Screen size (inch)	<p>Use this field to enter the screen size of the monitor or terminal. This field is only available for the categories "Terminal" and "Monitor".</p>
	Separator
Cartridge	<p>Use this field to enter the type of toner or ink cartridge that can be placed inside the printer or multifunction device. This field is only available for the category "Printer/Multifunction".</p>
Color	<p>Use this field to select one of the following options to indicate whether or not the printer or multifunction device can print in color:</p> <p>No, Black and White Only Yes, Color</p> <p>This field is only available for the category "Printer/Multifunction".</p>
Compatibility	<p>Use this field to enter the laptop models that can dock in this station. This field is only available for the category "Docking Station".</p>
Capacity (#)	<p>Use this field to enter the number of disk or tape drives that the CI can operate. This field is only available for the categories "Disk Controller", "Tape Controller", "Disk Array" and "Tape Array".</p>
Capacity (VA)	<p>Use this field to enter the capacity of the emergency power generator or uninterrupted power supply. This field is only available for the categories "Emergency Power Generator" and "Uninterrupted Power Supply".</p>
Capacity (min.)	<p>Use this field to enter the estimated time that the emergency power generator (without refueling) or uninterrupted power supply can provide sufficient power to the configuration items that rely on it. This field is only available for the categories "Emergency Power Generator" and "Uninterrupted Power Supply".</p>
	Separator
Speed (kbps)	<p>Use this field to enter the bandwidth of the WAN link or the maximum connection speed of the modem. This field is only available for the categories "WAN Link" and "Modem".</p>
Protocol	<p>Use this field to select the protocol of the switch or hub from the following list of options:</p> <p>Ethernet Fast Ethernet Giga Ethernet Token Ring</p>

	<p>FDDI</p> <p>This field is only available for the categories "Switch" and "Hub".</p>
No. of ports	<p>Use this field to enter the number of ports of the switch or the hub. This field is only available for the categories "Switch" and "Hub".</p>
No. of licenses	<p>Use this field to enter the number of licenses. Enter "99999" if the license type is "Unlimited User License". This field is only available for the category "Software License".</p>
Page	Finance
Field	Utilization
Serial number	<p>Use this field to enter the serial number of the configuration item. Use this field to enter the license number if the category equals "Software License". Leave this field empty if the category equals "Database", "Software", "Software Package for Distribution", "Software/Interface Configuration Settings", "Web Site", or "WAN Link".</p>
Asset ID	<p>Use this field to enter the number under which the configuration item has been registered in the financial application (e.g. in SAP).</p>
Owner	<p>Use this field to select the internal organization which budget was used to purchase the configuration item (CI). Note that if the CI has been leased, rented, or borrowed from a supplier, you should select this external organization.</p>
Supplier	<p>Use this field to select the supplier from which the configuration item (CI) has been obtained. If the CI was developed internally, select the internal organization that developed it. Note that the lease company should be selected in this field if the CI is leased.</p>
Start date	<p>Use this field to specify the invoice date of the configuration item (CI), if it is expensed or capitalized. Specify the start date of the lease contract if the CI is leased.</p>
Book value	<p>Use this field to enter the invoice amount if the configuration item (CI) is expensed. If the CI is capitalized, enter the book value of this CI (this is normally equal to the invoice amount). If the CI is leased, enter the annual lease amount that is to be paid for the CI.</p>
Depreciation	Separator
Method	<p>Use this field to specify whether of not the configuration item should be depreciated and if so, which depreciation method is to be applied. To do this, select one of the following options:</p> <ul style="list-style-type: none"> Double Declining Balance Reducing Balance (or Diminishing Value) Straight Line (or Prime Cost) Sum of the Year's Digits N/A - Cost is Zero/Included in Other CI N/A - Expense (i.e. not Capitalized) N/A - Leased (i.e. Owner is an External Organization)
Salvage value	<p>Use this field to enter the value of this configuration item at the end of its useful life</p>

	(i.e. at the end of its depreciation period).
Useful life (years)	Use this field to enter the number of years within which the configuration item (CI) is to be depreciated. Leave this field empty if the depreciation method for the CI is different from double declining balance, straight line, or sum of the year's digits.
Rate (%)	Use this field to specify the rate that should be applied to calculate the depreciation of the configuration item (CI) using the reducing balance method. Leave this field empty if the reducing balance depreciation method should not be applied for the CI.
	Separator
Lease notice	Use this field to specify the date before which the lease company needs to be contacted to cancel the lease for the configuration item.
Lease expiry	Use this field to specify the date on which the current lease contract for the configuration item will have expired.
	Separator
Warranty expiry	Use this field to specify the date on which the warranty coverage for the configuration item will have expired.
Contract	Use this field to select the support and/or maintenance contract that covers the configuration item.
Page	Users
Field	Utilization
Persons	Use this field to select the persons who use the configuration item (CI) or for who the CI is reserved. Leave this field empty if the CI is not used by, or reserved for, a specific person.
Organizations	Use this field to select the organizations which use the configuration item (CI) or for which the CI is reserved. Leave this field empty if the CI is not used by, or reserved for, a specific organization.
Page	Parents & Components
Field	Utilization
Parent CIs	For a software CI, use this field to create a link with the software suite that this CI is a module or application of. For a software CI, use this field to create a link with all processing units on which the CI has been installed. For a hardware CI, use this field to create a link with the hardware CI that this CI is a component of, installed in, or directly connected to (not using the network).
Component CIs	For a processing unit, use this field to create a link with all software CIs that have been installed on this CI. For a software suite, use this field to create a link with all software CIs that form modules or applications of this CI.

	For a hardware CI, use this field to create a link with all hardware CIs that make up, are installed in, or are connected directly (not using the network) to this CI.
Page	Related CIs
Field	Utilization
Related CIs	<p>For a hardware CI, use this field to create a link with all other hardware CIs that have a direct network connection with this CI. Select the CI relation type "Network Connection".</p> <p>For a hardware CI, use this field to create a link with all other hardware CIs that provide redundancy to this CI. For example, an ISDN backup line for the main WAN link, or a server that forms a cluster together with another server. Select the CI relation type "Redundancy".</p> <p>For a software CI, use this field to create a link with all other software CIs that depend on this software CI, or which the software CI depends on. Select the CI relation type "Dependency between Software CIs".</p> <p>For a software license, use this field to create a link with all software CIs that are covered by this license. Select the CI relation type "License".</p>
Page	Services
Field	Utilization
Services	Use this field to link the configuration item to the services that it supports.
Page	Alarms & Requests
Field	Utilization
Alarms	This field automatically lists all the alarms that have been generated for this configuration item.
Support Requests	This field automatically lists all the support requests that have been registered for this configuration item.
Page	Problems
Field	Utilization
Problems	This field automatically lists all the problems that have been identified for this configuration item.

Page	Work Orders
Field	Utilization
Work Orders	This field automatically lists all the works orders that have affected, or are planned to affect, this configuration item.
Page	History
Field	Utilization
Registration	The application automatically specifies in this field who created the item and when it was created. The application also uses this field to indicate who last updated the item and when this was done.
History	The application automatically creates a line when an audited field is filled out or updated. For each history line the application specifies who caused it to be created and when it was created.

Contract

The table below lists the fields of the Contract form and provides utilization guidelines for each field.

Page	Main
Field	Utilization
Contract number	Use this field to enter the number or ID of this contract.
Name	Use this field to enter the name of the contract. Example: IBM NetFinity server support contract
	Separator
Supplier	Use this field to select the supplier with which this contract has been established.
Support hours	Use this field to specify the days and hours during which support can be obtained for the configuration items that are covered by this contract.
Response (hours)	Use this field to enter the number of hours within which the supplier is to respond to a support request during support hours.
Instructions	Use this field to specify how support can be obtained for the configuration items that are covered by this contract. Specify, for instance, the customer code if the supplier requires this code in order to provide support.

	Separator
Start date	Use this field to specify the date on which the contract becomes (or became) effective.
Expiry date	Use this field to specify the date on which the contract will have expired.
	Separator
Remark	Use this field to enter any additional information about this contract that could prove useful.
	Separator
Folder	This field is automatically set to the folder of the configuration manager's organization.
Page	Cls
Field	Utilization
Cls	Use this field to create a link with all configuration items that are covered by this contract.
Page	History
Field	Utilization
Registration	The application automatically specifies in this field who created the item and when it was created. The application also uses this field to indicate who last updated the item and when this was done.
History	The application automatically creates a line when an audited field is filled out or updated. For each history line the application specifies who caused it to be created and when it was created.

Organization

The table below lists the fields of the Organization form and provides utilization guidelines for each field.

Page	Main
Field	Utilization
Category	Use this field to select the appropriate organization category

	<p>from the following list of options:</p> <ul style="list-style-type: none"> Company Region Affiliate Department Customer Supplier <p>Note that the organization category "Customer" should be used for organizations that are not part of the company and that have a subscription (i.e. an SLA) to one or more services that are provided by the service provider organization within the company.</p> <p>The organization category "Supplier" should be used for organizations that are not part of the company and that deliver goods and/or services to the service provider organization within the company.</p>
Code	Use this field to enter a unique code for the organization.
Name	Use this field to enter the full name of the organization.
Telephone	Use this field to enter the main telephone number of the organization. Syntax: +1 (123) 456-7890.
Fax	Use this field to enter the main fax number of the organization. Syntax: +1 (123) 456-7890.
Service Desk	Separator
Support phone	Use this field to enter the service desk telephone number of the organization. Syntax: +1 (123) 456-7890. Use this field only if the organization category is "Supplier". Leave this field empty if the organization does not have a service desk.
Support fax	Use this field to enter the service desk fax number of the organization. Syntax: +1 (123) 456-7890. Use this field only if the organization category is "Supplier". Leave this field empty if the organization does not have a service desk.
Support e-mail	Use this field to enter the SMTP e-mail address of the organization's service desk. Use this field only if the organization category is "Supplier". Leave this field empty if the organization does not have a service desk.
	Separator
Remark	Use this field to enter any additional information about this organization that might prove useful.
	Separator
Time zone	Use this field to select the time zone that should be applied to the SLAs for which this organization is the provider. Leave this field empty if the organization is not a service provider.
Folder	This field is automatically set to the folder of the organization to which the person

	who opened the item belongs.
Page	Details
Field	Utilization
Parent	Use this field to select the parent organization. Do not use this field if the organization category is "Supplier". Ensure that the category of the selected organization is of a higher level than that of the organization from which the selection is made.
Persons	Use this field to select the person(s) that work for the organization. Do not use this field if the organization category is "Supplier".
Child Organizations	Use this field to create a link with all organizations that are part of this organization. Do not use this field if the organization category is "Supplier". Ensure that the category of the selected organization(s) is of a lower level than that of the organization from which the selection is made.
Page	Addresses
Field	Utilization
Addresses	Use this field to enter the address(es) of the organization. Use this field only if the organization category is "Supplier".
Web sites	Use this field to enter the URL(s) of the organization's web site(s).
Page	History
Field	Utilization
Registration	The application automatically specifies in this field who created the item and when it was created. The application also uses this field to indicate who last updated the item and when this was done.
History	The application automatically creates a line when an audited field is filled out or updated. For each history line the application specifies who caused it to be created and when it was created.

Address

The table below lists the fields of the Address form and provides utilization guidelines for each field.

Page	Address	
Field	Utilization	
Address type	<p>Use this field to select the type of address from the following list of options:</p> <ul style="list-style-type: none"> Street Address of Main Site Street Address of Other Site Postal Address 	
Address line 1	Use this field to enter the address.	
Address line 2	Use this field to enter a second line of address information, if required.	
City	Use this field to enter the name of the city.	
Zip/Postal code	Use this field to enter the zip or postal code.	
State/Province	Use this field to enter the name of the state or province.	
Country	Use this field to enter the name of the country.	