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Asset and CI management

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Asset and configuration item (CI) management refers to creating assets, setting appropriate states and substates, synchronizing assets and CIs, managing consumables, and retiring assets.

Relationship between asset and CI

It is important to manage the relationship between assets and associated CIs. Assets are tracked with the Asset Management application, which focuses on the financial aspects of owning property. Configuration items are stored in the CMDB, which is used to track items and make them available to users.

When an asset has a corresponding configuration item, the asset record and the configuration item record are kept synchronized with two business rules.

- Update CI fields on change (on the Asset [alm_asset] table)
- Update Asset fields on change (on the Configuration Item [cmdb_ci] table)

> **Note:** Assets and CIs can be synchronized only if they are logically mapped.

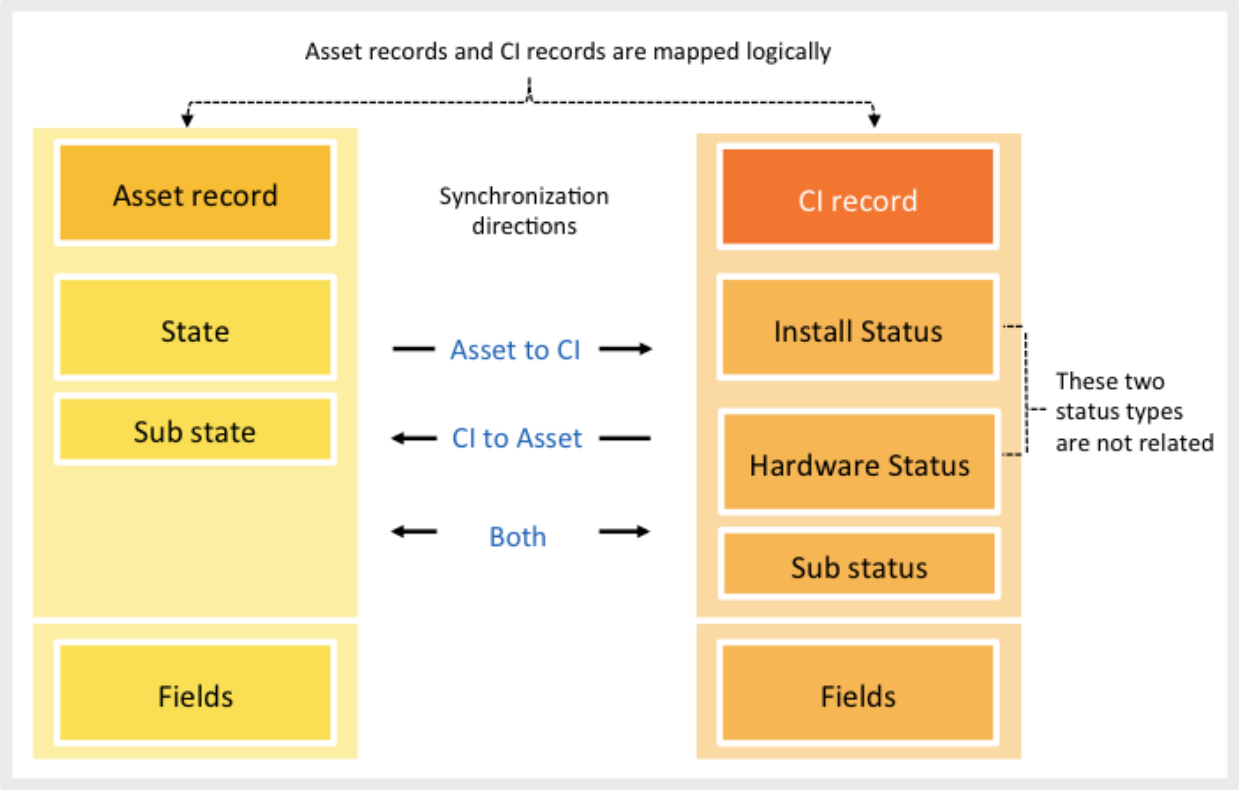
Asset-CI mapping and synchronization

The State field of asset record and Status field of CI record are synchronized so that changes made on one form trigger the same update on the corresponding form, ensuring consistent reporting.

> **Note:** The Now Platform synchronizes updates between assets and configuration items only if the asset and configuration item are pointed toward each other.

The following diagram illustrates the concept of Asset-CI mapping and synchronization.

Asset-CI mapping and synchronization: An Overview



This synchronization and mapping is based on the following factors:

- Asset state and CI status are not mapped on one-to-one basis; rather they are mapped to the most logical counterpart on the other table. For example, for a hardware asset set to state **In Stock - Pending disposal**, the corresponding CI is set to **In Disposition** with no substate.
- This synchronization happens between the asset's State field and the following CI fields:
  - Install Status field: Install Status does not have a sub status and must be used for non-hardware CIs.
  - Hardware Status and Sub status field: Hardware Status is visible only for Hardware CI.
- Drive changes by updating the state on the Asset form. The Asset-CI synchronization can be driven in the following ways:
  - Asset to CI synchronization: Change to the asset's status updates the logically mapped CI's Install Status or Hardware Status and sub status.
  - CI to Asset: Change to the CI's Install Status or Hardware Status updates the logically mapped asset's states and sub states.
- For a CMDB hardware CI, if both Hardware Status and Install Status is updated, the Hardware Status change is considered for mapping the corresponding state of the asset.
- CI's Install Status and Hardware Status work independently. There is no correlation between them. CI's Hardware Status change does not change CI's Install Status and vice

versa. To avoid confusion, keeping both status for CMDB CI Hardware is not recommended.

List of the fields that get synced between Asset and CI

When modifying any of following fields on the asset or CI record, the same field on the corresponding record is automatically updated (with the exception of the **Cost** field, which is informational-only on the CI record).

Following is a list of fields that are synched.

- Asset tag
- Assigned
- Assigned to
- Checked in
- Checked out
- Company
- Cost (synchs in only one direction: asset to CI)
- Cost center
- Delivery date
- Department
- Due in
- Due
- GL account
- Install date
- Invoice number
- Justification
- Lease id
- Location
- Managed by
- Model
- Order date
- Order received
- Ordered
- Owned by
- PO number

- Purchase date
- Purchased
- Serial number
- Support group
- Supported by
- Vendor
- Warranty expiration

Create assets

You can create hardware, software license, consumable, license, and facility assets.

Before you begin

Role required: asset

Procedure

1. Navigate to **Asset Management** > **Portfolio** > **All Assets**.
2. Click **New** and specify what type of asset you want to create.
3. Fill in the fields.

Asset record fields

Display name
Name of the asset as it appears in record lists. Automatically set when asset is created, based on **Asset Tag** and **Model** fields.
Model category
Model grouping of the asset. Based on the model category selected, the asset can be linked to a configuration item.
Model
Specific product model of the asset.

Configuration Item
CI automatically created when this asset is created. The name that appears in this field is based on **Model category** and **Model**. Point to the reference icon () to see the configuration item details inherited from the asset record.
Quantity
Number of items this asset represents. An asset always has a quantity of one unless one or more of these points are true. • It is a consumable. Quantity is unrestricted because consumables are tracked in groups. • It is pre-allocated. Quantity is unrestricted when **Model category** and **Model** are defined and **Substate** is set to **Pre-allocated**. • It has no model and no model category.
General tab
Asset tag
Alphanumeric information assigned by your organization to help track the asset.
State
Current state of the asset, such as **On order** or **In use**.
Stockroom
Current stockroom in which the asset is physically located.
Reserved for
Person for whom the asset has been ordered. This field is visible when the asset state is **On Order**.
Assigned to
Person using or primarily responsible for this item. This field is visible when the asset state is **In Use**.
Managed by
Person who maintains the asset. This can be different from the person in the **Owned by** field.

Owned by
Person who has financial ownership of the asset. This can be different from the person in the **Managed by** field.
Parent
Parent asset of the asset. For example, a monitor or peripheral can have a workstation as their parent asset. When a parent link is defined, the fields related to assignment and state of the child assets is set to read-only and are populated based on the parent assignment and state fields. For more information, see Creating Bundled Models.
Class
Asset group, for example, base, hardware, license, or consumable.
Serial number
Serial number of this asset.
Substate
Current substate of the asset. The available substate settings depend on the state selected. For example, the **Retired** state contains the **Substate** options **Disposed**, **Sold**, **Donated**, and **Vendor credit**.
Location
Current physical location of the asset.
Department
Department to which the asset belongs.
Company
Company or organization to which this asset belongs.
Assigned
Date on which the asset was assigned to a user.
Installed
Date on which the asset was installed.

Comments
Information about the asset that would be helpful for others to know.
Financial tab
PO number
Purchase order under which the asset was purchased.
Order received
Date on which the asset was received.
Request line
Requested item to which the asset is linked.
Purchase order line
Purchase order line item to which the asset is linked.
Receiving line
Receiving slip line to which the asset is linked.
Invoice number
Invoice under which the asset was billed.
Cost
Price at which the asset was purchased.
Vendor
Vendor from which the asset was purchased. For assets automatically created from purchase orders in Procurement, the default value of the **Vendor** field is the vendor specified on the purchase order.
Purchased
Date on which the asset was purchased.
Ordered
Date on which the asset was ordered.

Opened
Date on which the requested item record was opened. The system automatically populates the field when a request line is specified.
GL account
General ledger account number with which the asset is associated.
Cost center
Group financially responsible for the asset.
Acquisition method
How the asset was acquired. Base system choices are **Purchase**, **Lease**, **Rental**, and **Loan**. For assets automatically created from purchase orders in Procurement, the default value is **Purchase**
Expenditure type
The type of expenditure. • **Capex**: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. • **Opex**: Operational expenditure is an on-going expenditure. For example, toners for the photocopier.
Disposal tab
Disposal reason
Text explaining why the asset is being retired.
Beneficiary
Organization that receives the asset when it is retired.
Resale price
Value of the asset when it is retired. For example, if the asset is donated, the value used when reporting taxes.
Scheduled retirement
Scheduled date on which the asset is retired.

Retired date
Actual date on which the asset was retired.
Depreciation tab
Depreciation
Depreciation method that is applied. Base system choices are **Declining Balance** and **Straight Line**. The depreciation value is defaulted from the associated Model.
Depreciation effective date
Date on which the specified depreciation method begins.
Salvage value
Estimated value of an asset at the end of its useful life. This value must be less than or equal to the Cost of the asset.
Residual date
[Read-only] Number of days that have passed since the **Depreciation effective date**.
Residual value
[Read-only] Value in the Cost field with the depreciation method applied.
Covered by Fixed Asset
List of all fixed assets that contain the asset. To add the asset to another fixed asset, double-click in the **Fixed asset** column, click the reference lookup icon (), select an asset, and click the green check mark.
Contracts tab
Lease contract
Name of the lease contract that applies to the asset.
Warranty expiration
Expiration date of the asset warranty.
Support group
Group managing the contract covering the asset.

Supported by
Person managing the contract covering the asset.
Entitlements tab (available for hardware assets)
Hardware Entitlements
Software asset license entitlements associated to the asset.
Device Entitlements tab (available for software assets)
Allocated condition
Condition that a configuration item must satisfy to be granted entitlement for this license (available for software entitlements).
Device Entitlements
Software license entitlements associated to the asset.
User Entitlements tab (available for software assets)
Assigned condition
Condition that a user item must satisfy to be granted entitlement for this license (available for software entitlements).
User Entitlements
User license entitlements associated to the asset.
Activities tab
Work notes
Work notes are updated for the following cases: • Updates to **Assigned To**, **Managed To State**, **Substate**, and **Reserved** fields of asset. The columns for these fields are audited by default and any update is recorded in the work notes. • Work notes for hardware and software assets are updated when asset is received by a purchase order and transfer order. These work notes help in tracking life cycle of the asset.
Related links

Calculate Depreciation
Click to calculate the depreciation amount and residual value.
Delete Assets Only
Click to delete the assets and not the associated CI.

4. Click **Submit**.

Retire assets

You can retire an asset at any time.

Before you begin

Role required: asset

About this task

After you change the state of an asset to **Retired**, the **Substate** field is active. When you retire an asset, the status of related CIs also changes to **Retired**. Selecting a substate is not required, but can be helpful for tracking and reporting.

Procedure

1. Navigate to **Asset Management** > **Portfolio** > **All Assets**.
2. In **State**, select **Retired**.
3. (Optional) In **Substate**, select **Disposed**, **Sold**, **Donated**, or **Vendor Credit**.
4. Click **Update**.

Delete assets

You can delete an asset at any time.

Before you begin

Role required: asset

About this task

A confirmation must be accepted before the asset and components are permanently deleted. If a CI and asset are linked, deleting one also deletes the other.

You should delete an asset only to clean up errors. For tracking purposes, the correct method for managing an asset that is no longer in use is to change the state of the asset to **Retired**.

Procedure

1. Navigate to **Asset Management** > **Portfolio** > **All Assets**.
2. Select the check box to the left of the asset **Name**.
3. In the **Actions** choice list below the list, select **Delete**.

Map asset and CI fields

When you map the asset and CI fields, synchronization happens both ways. Changes to either the asset or CI record are updated to the logically mapped record. You can synchronize custom mappings and mappings provided with the base instance.

Before you begin

Role required: admin or asset

> **Note:** If you upgraded from the Geneva release or a prior release and customized the `AssetAndCISynchronizer` script include before the upgrade, you must overwrite the customization and then recreate the custom mappings.

About this task

You can conditionally map the fields for synchronization. For example, you can map the Location field only for a hardware asset and not for a software asset. So when an asset is updated, the Location field is synchronized only for the hardware asset.

Procedure

1. Navigate to **Asset Management** > **Administration** > **Asset-CI Field Mapping**.
2. Click **New**.
3. From the **Asset field** list, select the field.

   This list refers to the alm_asset table.
4. From the **Configuration Item field** list, select the logically associated field. This list refers to the cmdb_ci table.
5. To create conditions for the mapping, click the **Advanced view** related link.
   - To specify conditions for synchronizing the asset field with the CI field, use the **Asset mapping condition** builder.

- To specify conditions for synchronizing the CI field with the asset field, use the **Configuration Item mapping condition** builder.

6. Select the **Active** check box to activate the mapping.
7. Click **Submit**.

Map asset state and CI install status

Map the asset State and Substate fields to the CI Install Status field. The Substatus field of the CI Install Status field should not be used for hardware CIs because asset synchronization does not update this field when hardware assets are updated. When you create the mapping, you can set the synchronization direction from the asset, CI, or both.

Before you begin

Role required: admin or asset

> **Note:** If you upgraded from the Geneva release or a prior release and customized the `AssetAndCISynchronizer` script include before the upgrade, you must overwrite the customization and then recreate the custom mappings.

Procedure

1. Navigate to **Asset Management** > **Administration** > **Asset-CI Install Status Mapping**.

   By default, only custom mappings are displayed. The list of mappings uses the filter condition of **[Out of the box] [is] [False]**.
2. Click **New**.
3. From the **Asset State** list, select the state you want to map.
4. (Optional) If available, select a substate from the **Asset Substate** list.

   Some of the asset states do not have a substate.
5. From the **Configuration Item Status** list, select the logically associated CI status you want to map.
6. From the **Sync direction** list, select the direction you want to drive the synchronization.
7. Select the **Active** check box to activate the mapping.
8. Click **Submit**.

Map asset state and CI hardware status

Map the asset **State** and **Substate** fields to the CI **Hardware Status** field. Do not use the **Substatus** field on hardware CIs because the CI synchronization does not update the field when assets are updated. When you create the mapping, you can set the synchronization direction from the asset, CI, or both.

Before you begin

Role required: admin or asset

> **Note:** If you upgraded from the Geneva release or a prior release and customized the `AssetAndCISynchronizer` script include before the upgrade, you must overwrite the customization and then recreate the custom mappings.

About this task

The Install Status and Hardware Status fields of a CI are independent of each other. There is no correlation between them. A change to the Hardware Status field does not change the CI Install Status field and vice versa.

Procedure

1. Navigate to **Asset Management** > **Administration** > **Asset-CI Hardware Status Mapping**.

   By default, only custom mappings are displayed. The list of mappings uses the filter condition of **[Out of the box] [is] [False]**.
2. Click **New**.
3. From the **Asset state** list, select the state you want to map.
4. (Optional) If available, select a substate from the **Asset substate** list.

   Some of the asset states do not have a substate.
5. From the **Configuration Item status** list, select the logically associated CI state you want to map.
6. (Optional) If available, select a substate from the **Configuration Item substatus** list.

   Some of the CI statuses do not have a substatus.
7. From the **Sync direction** list, select the direction you want to drive the synchronization.
8. Select the **Active** check box to activate the mapping.
9. Click **Submit**.

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