SACM, ITAM Quick Flow Demo Card

SMA-X 2017.11

# Background

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| Key Messages | * SMA-X includes most IT Asset Management applications and processes. Manage asset portfolio, track each asset along its lifecycle, understand how many assets you have, where they are, who is using it, and manage related vendors and contracts, optimizing their utilization rate and reducing TCO. The asset portfolio is unified with SMA-X CMDB in that the CI and Asset are designed as one entity with a Config Item facet and an Asset facet for easier management * Built for purpose – by not taking a generic record or platform approach, SMA-X is designed to support user’s information needs (e.g., show vendor and contract when and where relevant) improving productivity. This is of particular importance for SACM where ITSM, ITAM and SACM domains come together to support specific activities. |
| Customer Challenge | * Asset management disconnected from the related requests and incidents – unable to use asset and vendor information in SM processes, and asset data not easily maintained * Maintenance contracts expire without warning, leaving service at risk * Difficulty getting service asset data into the system, and ensuring good data quality to support decisions and problem solving |
| Engage Them | * Do you know which infrastructure items are behind services? * Do your agents struggle to understand who is impacted by an incident? * Are you able to manage requests for laptop or other in-stock devices seamlessly from the request? * How do you ensure vendor contracts are current? Have you missed contract renewals? Are you able to see contracts related to the asset when managing a related incident? |
| Differentiators | * Easy to create dashboards and reports for Asset Managers to monitor stock, asset location, model, age, and contract expiration * Integrated Asset Reservation workflow ensures effective use of in-stock assets for deployment. (shown in Self-Service demo card) * Big Data technology enables helpdesk agents to easily see what devices are used by the caller personally as well as shared devices in their location, and related Maintenance or Support contracts * Automated CI recognition in Incident and Change descriptions to simplify data entry of related Infrastructure CI’s |

# Quick Flow

The goal of the Quick Flow demo card is to provide a benefit oriented *overview*, to *introduce* the customer to value and solution. It should be completed in ~5-10 minutes; optional sub-flows to demonstrate more of the solution may be included below. Make sure your demo environment is ready – see demo set up below. After practicing and perfecting the flow, you might want to copy and paste the rightmost Cheat Sheet column (below) to serve as a printed or electronic guide during the demo.

**Use Case #1: SACM reports can be added to Dashboard**

* Stockroom report
* Asset Age report

**Use Case #2: Agent entering new live support ticket has easy access to User CI’s**

**Use Case #3: Incident analyst has easy access to SACM information**

* Automated CI detection expedites adding Cis to Incident (also applies to other record types)
* Contracts for Involved CI’s are displayed automatically.

**Use Case #4: Impact Analysis for CI’s**

**Use Case #5: Stockroom management**

* Stockroom reservations for fulfillment (shown in Service Request and Catalog demo card)
* Receive assets (optional)

| **Do** | **Say** | **Cheat Sheet** |
| --- | --- | --- |
| **IT Asset Management and SACM** | * This demonstration highlights the IT Asset Management (ITAM) and Service Asset and Configuration Management (SACM) capabilities. * Customers can manage the lifecycle of devices, infrastructure and peripherals, and software licenses, including many facets of IT Financial Management. * Let’s see how you can accelerate incident resolution, optimize contracts, reduce fulfillment time, and increase asset utilization by bring together ITSM, ITAM and SACM on a big data platform. |  |
| **Dashboard – Stockroom reports**   * Login as [Jennifer.falconmf](mailto:Jennifer.falconhpe@gmail.com) Dashboard, Devices by stockroom and subtype chart (near bottom of dashboard) * expand (double arrow) * filter (click servers in legend to remove servers) * drill down (click stockroom B bar in chart) | * Let’s start with looking at a simple dashboard report showing devices by stockroom. * Here I see a summary view, and when reports are expanded, the legend can be used to filter, show only laptops for example, and to drill down to actual records. * Perhaps from here I’ll use mass entry to move these to another stockroom, or filter further to evaluate completeness of data * These easy to use, highly configurable, reports make it easy for the Asset Managers to track and manage their portfolios. Let’s see how that data can be used in an ITSM process. | * Dashboard * devices by stockroom and type chart * expand, filter servers out * drill down (click stockroom B) |
| **Dashboard – Asset aging and Refresh**   * Back to Dashboard - Asset age for Device (near bottom of dashboard) * Maximize * Minimize | * Reports such as Asset Age by device can help support strategic questions such as asset retirement. | * Dashboard * Asset age for device |
| **Helpdesk agents easily see asset information**   * Logged in as Jennifer * Service Request – Live Support * Select user, Amy Lopezmf * Collapse recent requests list * Enter Cannot login to webmail, * copy to description, * click CI circle to see User Cis and Location CI’s, press “link as related” button to add user CI as related CI * Review suggested solutions, * Review recent incidents, press “link as related” button for incident “(DEMO) Cannot login to webmail” * Save * Full Request details | * You are an agent working the service desk using the Live Support feature for taking live calls quickly. Amy Lopezhpe is calling in about a problem with her PC. You see past requests from Amy, and shortcuts to quickly link to or navigate to the caller’s assets or perhaps the assets in their location e.g., a shared printer. Linking assets to new tickets will help manage related work or changes, and see maintenance contracts for assets in a more automated way. That could, for example, help spot trends with failing devices or help make asset retirement decisions. * Let’s say the caller reports they cannot connect to Webmail – SMA-X proactively searches against possible solutions, based on the unstructured data in the description, bringing the agent the answer more quickly. | * Service Request -> Live Support, * New call from Amy Lopezhpe * Enter title and description: cannot login to webmail * CI button, location Cis: link User CI as related * Review Suggested solution * Review Recent Incidents: link “Cannot login to webmail” incident as related * Save * Full Request details |
| **Automated CI recognition in Incidents (and Changes) and Related Contracts sidebar**   * Related records, Open related Incident in new tab * Description shows automated CI recognition * Right pane shows Related contracts and vendor for maintenance service for Involved Cis. * The Involved Cis tab shows the full list of related CIs | * Here’s a related Incident – if we drill into it further we see that the description included a CI name the agent included on entry. SMA-X recognizes CI names in Changes and Incidents and can automatically add it as a related record. This is an important part of traceabilty – SACM data is much richer by creating these connections – and accuracy – much harder to select the wrong CI. * Another great connection to ITAM data is the visibility of contracts, warranties, and news – all potential time savers when exploring Incident resolution. | * Incident (DEMO) Cannot login to webmail – Edit in new tab * CI text detection in description * Show right pane: contract, vendor |
| **Understand Impact for Incidents and Changes**   * CI tab of incident (or change) * Select a server CI and Show Impact | * And right from the Incident we can see business services could be impacted by this server. * Later we can look at the server record. SMA-X models the Asset and CI as one, bringing together both sides of the story to make connections easier. * You can use the OOTB integration with UCMDB and enrichment rules to populate and drive data quality. | * Involved Cis tab for full list and detail drill-down * Show Impact (from CI tab on Incident) |
| **Fulfill New PC request from stockroom**   * *See the Service Request and Catalog demo card* |  |  |

# Optional Sub Flows

Customer intrigued after seeing this overview? Ideas for possible sub-flows/drill-downs:

| **Do** | **Say** |
| --- | --- |
| Importing and enriching data |  |
| Asset Model, Brand |  |
| CMDB integration, Impact Analysis |  |
| Receiving Asset | This is the start of the asset lifecycle. You can initially add an asset with only its physical information and then capitalize the asset when you receive financial information. Conversely, you can initially add the asset's financial information when you order it and then add the physical information once it is received; or you can enter all of the information at once online or by batch.  You can receive to a selected store for the in stock assets. SMA-X enables you to receive ‘in use’ assets directly to the 'owner'.  If you want to receive the assets in batch. Enter the relevant attributes, select the ‘advanced shipment slip’ as import method, select your local shipment slip, and import. The sample template file is for your reference of the shipment notes format. The system will populate the asset-tag and do the data enrichment in the backend.  Click the ‘receiving report’ to enter the report list dialog. The reports will log the process for your reference.  See SACM- Store management, SACM-HOMEPAGE |

# Demo Preparation on a new tenant

Demo data prep includes initial set-up tasks and items that must be checked before each demo (e.g., demo data changes over time, or to return to the pre-demo state). Be mindful of whether the changes are appropriate or needed for the demo tenant you’re using – e.g., for the shared demos, initial set-up is probably already done, and some changes shouldn’t be applied (e.g., theme)

## Initial Set-up

* Amy.lopezmf: assign HPPC001 device to Amy as a user and move it from In stock to In use in lifecycle.
* Change location for device, HPCOLORM750A, to North America/United States/Phoenix
* Rename the (DEMO) HP Server maintenance to (DEMO) HP Maintenance contract and add some PC's to it, including: HPPC0001, HPPC0009, HPPC0017, and also add server: (DEMO) SER123MS001
* Add reports to Dashboard for: Devices by Stockroom and type, Asset age for device
* Create new incident (if not already done as part of IM demo card) or edit existing “(DEMO) cannot login to webmail” incident:
* Title: (DEMO) Cannot login to webmail
* Description: Users are reporting issues connecting to webmail
* Add CI to description for CI text detection (DEMO) SER123MS001
* Modify assignee to be Jennifer.falconmf