

# The SysAid<sup>TM</sup> CMDB

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CMDB are the initials for Configuration Management Data Base. The CMDB is a repository of information related to all the components of an information system. In fact, the CMDB is a data base that keeps information about all your network assets, software products and catalog items, as well as all the information about the relations between them.

The SysAid CMDB helps your organization understand the relationships between components and track their configuration.

The SysAid CMDB can be useful for storing information about many kinds of items. For example, even a Taxi station can use SysAid CMDB to keep track of the different vehicles, drivers, destinations, garages, and other relevant components and information.

As long as you maintain and keep your CMDB up-to-date, you will be able to enjoy the associations SysAid creates between your various configuration items. Here are a few examples for configuration items you can set and manage in your CMDB:

- hardware (including network components where relevant)
- system software, including operating systems
- business systems - custom-built applications
- software packages
- database products
- physical databases
- environments
- configuration baselines
- Policies (Backup, Security etc.)
- configuration documentation, e.g. system and interface specifications, licences, maintenance agreements, SLAs, decommissioning statement
- other resources e.g. Users, suppliers, contracts
- other documentation e.g. IT business processes, workflow, procedures

To reach the SysAid CMDB module, choose CMDB  from the left main menu.

You can see five tabs:

CI List

CI Types


CI Relation Types

CI Template

Imports


### CI List-


This is the first screen you reach in the SysAid CMDB. Here you can see all your Configuration Items- CIs. A CI is each and every element kept in your CMDB, for which you can see all relations with other CIs. In SysAid CMDB the CI can belong by default to one of the following CI types:

An asset (PC or server) 

A software products 


A catalog item 

A business process 



A physical database 

A network connection 

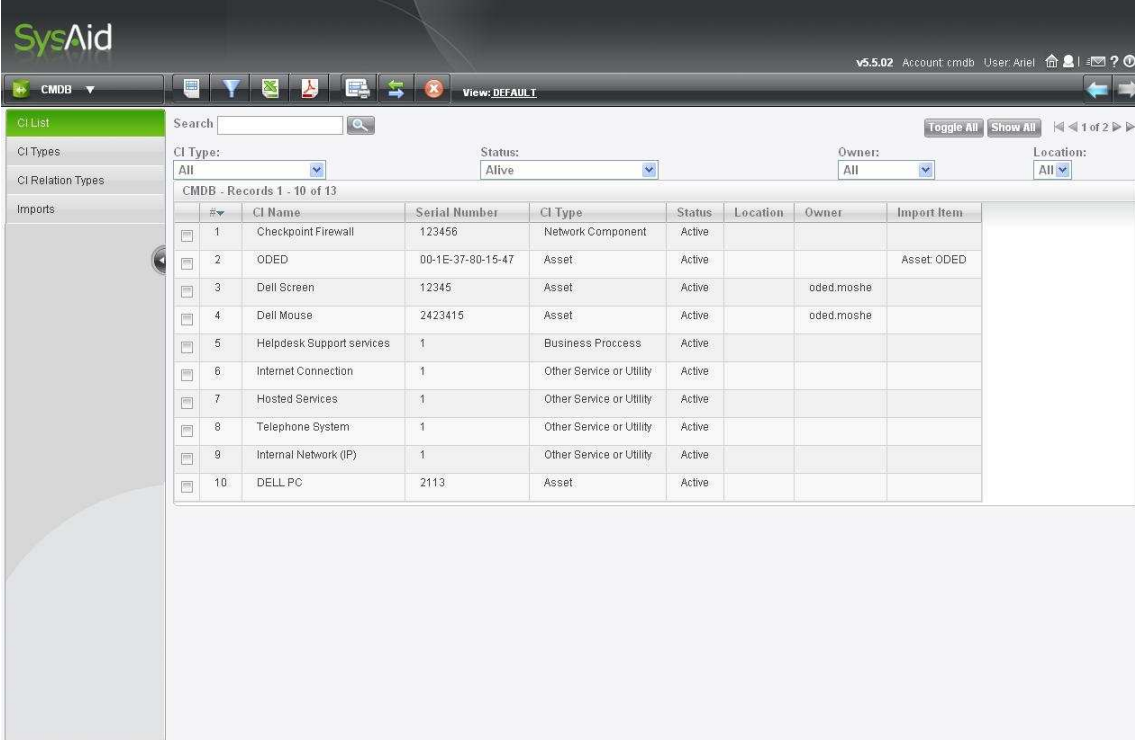
A system software 

Or a general CI 

One of these special icon representing the CI type appears next to each CI on


your list. You can manually add a new CI by clicking the **New** icon  in the top of the screen, or add any needed column to the CI list by clicking the **Customize** icon,  as is usual with SysAid lists.

**Figure 1: SysAid CI List**



The screenshot shows the SysAid CMDB interface. The left sidebar contains navigation options: CI List (selected), CI Types, CI Relation Types, and Imports. The main area displays a table of CI records with the following columns: #, CI Name, Serial Number, CI Type, Status, Location, Owner, and Import Item. The table contains 10 records, including a Checkpoint Firewall, ODED, Dell Screen, Dell Mouse, Helpdesk Support services, Internet Connection, Hosted Services, Telephone System, Internal Network (IP), and DELL PC.

#	CI Name	Serial Number	CI Type	Status	Location	Owner	Import Item
1	Checkpoint Firewall	123456	Network Component	Active			
2	ODED	00-1E-37-80-15-47	Asset	Active			Asset ODED
3	Dell Screen	12345	Asset	Active		oded.moshe	
4	Dell Mouse	2423415	Asset	Active		oded.moshe	
5	Helpdesk Support services	1	Business Process	Active			
6	Internet Connection	1	Other Service or Utility	Active			
7	Hosted Services	1	Other Service or Utility	Active			
8	Telephone System	1	Other Service or Utility	Active			
9	Internal Network (IP)	1	Other Service or Utility	Active			
10	DELL PC	2113	Asset	Active			

In the CI list you can view and search all the CIs that exist in your CMDB. You can see the information in a variety of ways, and filter the results according to your needs, simply by clicking the **Filter** icon  to create your appropriate filter. To learn how to customize different views for your CI list, please visit the **SysAid User Guide, Chapter 8.1.4- Understanding Views and their Importance**.


Click any row entry to see more details about a specific CI. For every CIs in your system you can find four tabs: General Details, CI Relations, Incidents and History. Naturally, SysAid allows you to customize additional tabs if needed. Click the **Customize** icon, and then in the popup screen click the **New Page** button to add new tabs.

Figure 2: CI General Details page

The screenshot shows the SysAid CMDB interface. The top navigation bar includes the SysAid logo, version v5.5.02, and user information. The main content area is titled 'CMDB - CI # 3' and has tabs for 'General Details', 'CI Relations', 'Incidents', and 'History'. The 'General Details' tab is active, displaying a form with the following fields:

- CI Name: Dell Screen
- Serial Number: 12345
- CI Type: Asset
- Status: Active
- Priority: Normal
- Location: select location
- Owner: oded.moshe User general details Change
- Supplier: select supplier
- Supply Date: [calendar icon]
- Accept Date: [calendar icon]
- Import Item: None
- Notes: [text area] Add a note

At the bottom of the form are buttons for 'OK', 'Cancel', and 'Apply'.

Under the **General Details** tab you can see the CI name, type, serial number- for assets, status, priority, location, and other significant information. If you wish to customize the fields available in this form, click the **Customize**  icon.

Under the **CI Relations** tab, you will be able to see all the CIs related to this CI, and their type of relations with it. For instance, if the CI you are looking at is a workstation in your network, you will be probably able to see the employee who works on this station, the software installed on it, the printer this station is connected to, the server it is using, etc. Note that for any information to appear, it should be first fed into SysAid.

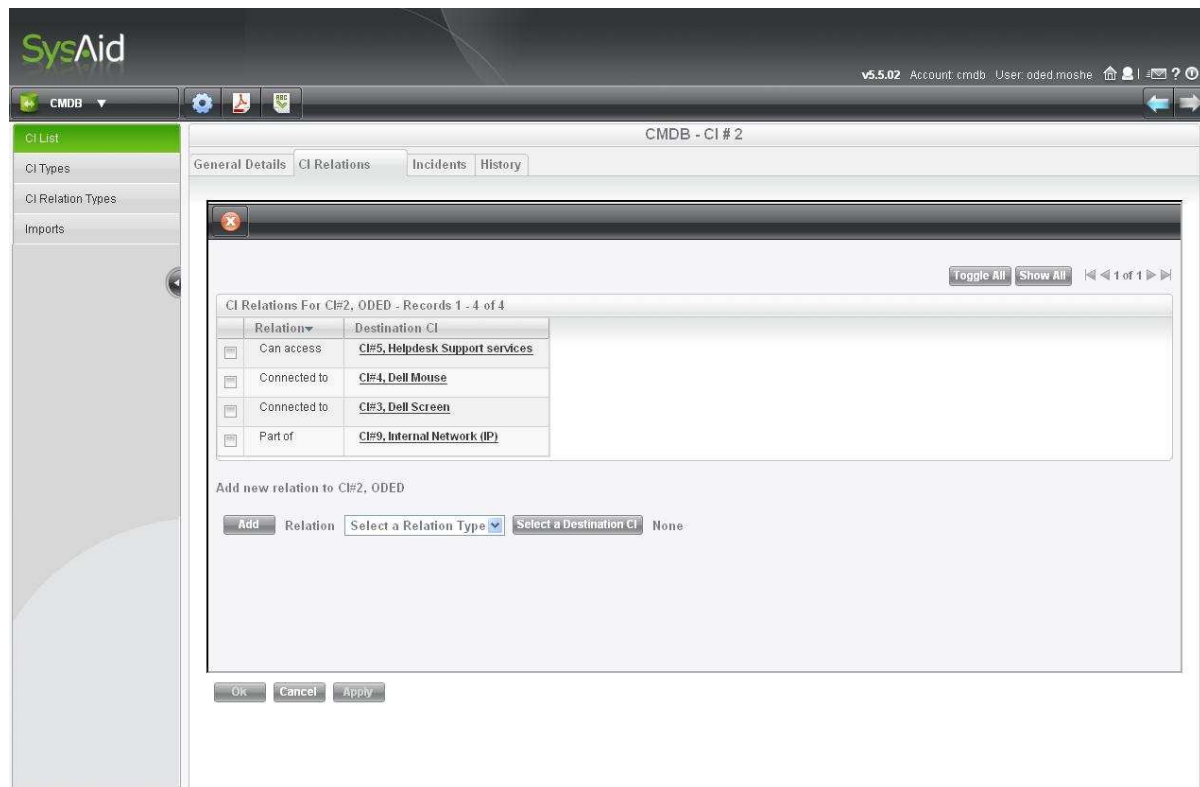
In this screen you can also manually add a relation of any type to any other CI in your system, by clicking the **Add** button and choosing a relation type from the dropdown menu. Clicking the button **Select a Destination CI** will open a popup with a list of all your CIs.

To attach any asset to a CI:

1. Go to System-> My Network Asset.
2. Click the row entry of the asset you wish to attach.
3. Under the CMDB tab of that asset, click the 'Change' button.
4. Select from the list in the popup screen the CI to attach your asset to.

As a result, you will be able to see a link to this asset inside the CMDB, under the **General Details** tab. The asset will appear as an **Import Item**- a field which shows the source of the CI.

**Figure 3: CI Relations tab**



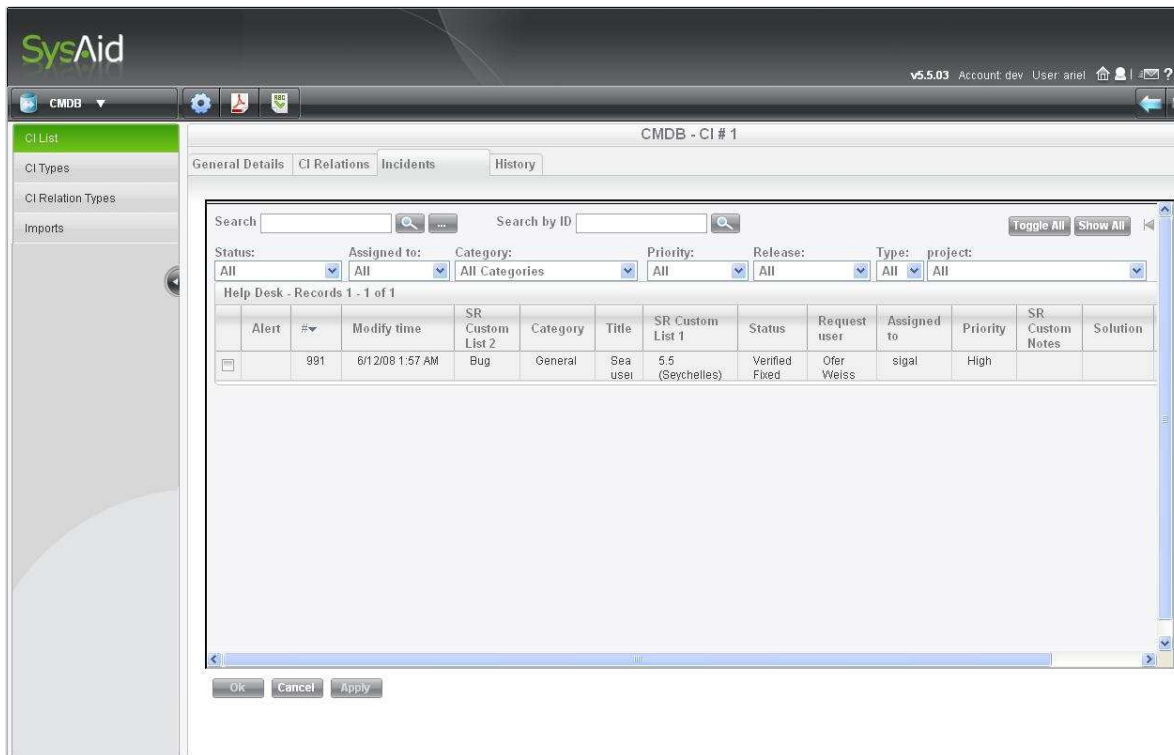
Under the **Incidents** tab you can view a list of all the Service Requests this CI is involved with. For a relevant service request to appear under this CI Incidents tab, the SR should be connected to that CI. To make such a connection go to:

**Helpdesk-> Service Request-> CMDB tab.**

Click the **Change** button to choose the CI to attach the SR to.

Click **Save** to save the connection between the SR and your chosen CI.

Figure 4: CI Incident tab



Viewing under the Incidents tab all the service requests connected to this CI can help plan ahead: for instance, if you can see one of your servers is out of order, you will be able to answer all the service requests from CIs connected to this server that their server is down, and the problem is being taken care of. If you maintain your CMDB in good order, all your service requests will be associated to their relevant configuration items, and you will be able to enjoy the CMDB benefits.

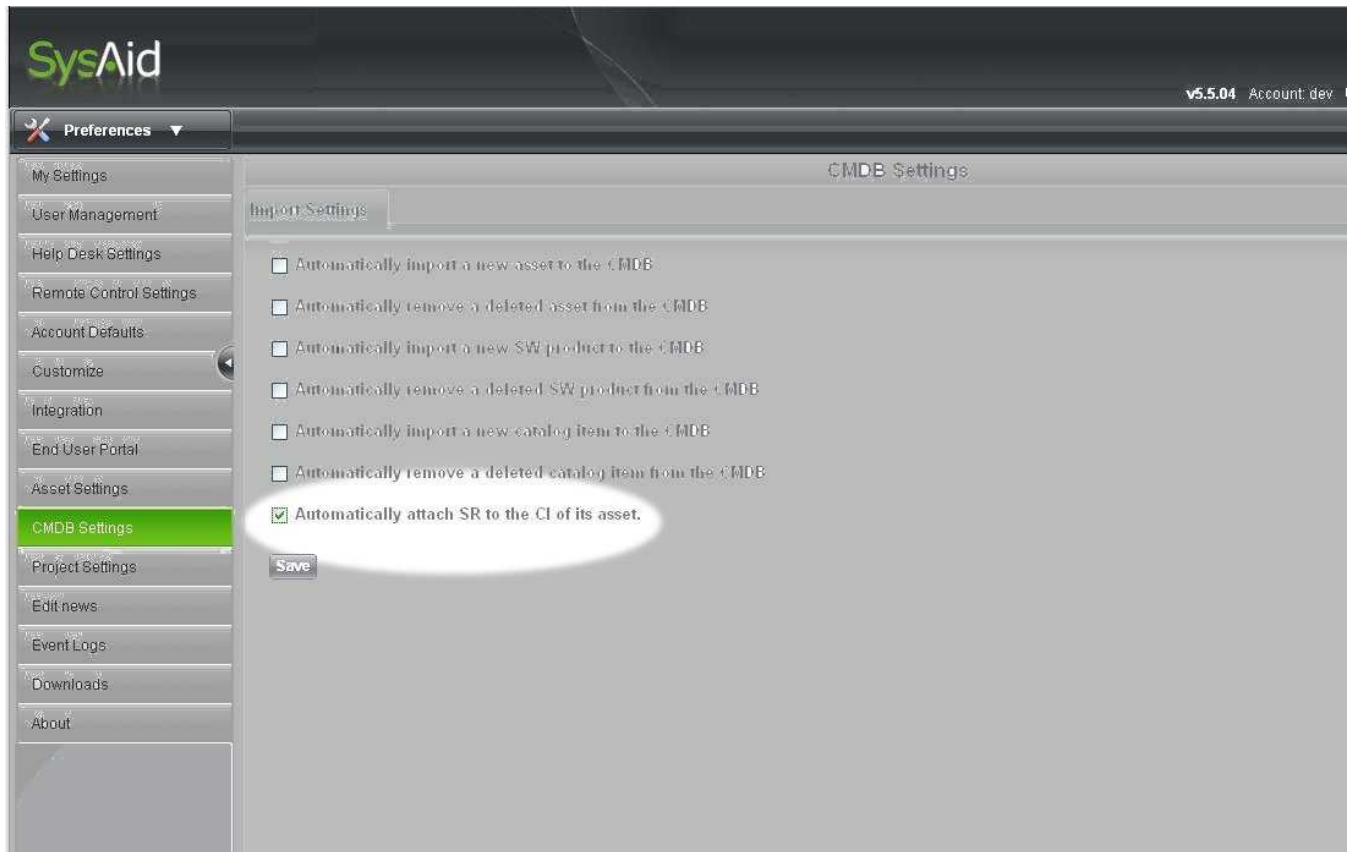
**Please Note:**

Only when an end user sends a service request via the SysAid agent to your helpdesk will the SR automatically be attached to the relevant CI. To set SysAid to make the automatic association, go to:

**Preferences -> CMDB Settings**

And check the box: “Automatically attach SR to the CI of its asset”.

Figure 5: Automatically attach SR to the CI of its Asset



In any other case, for instance, when the administrator opens a service request as a result of a phone call, or when a service request arrives as an email message, you will have to manually attach the service request to the CI.

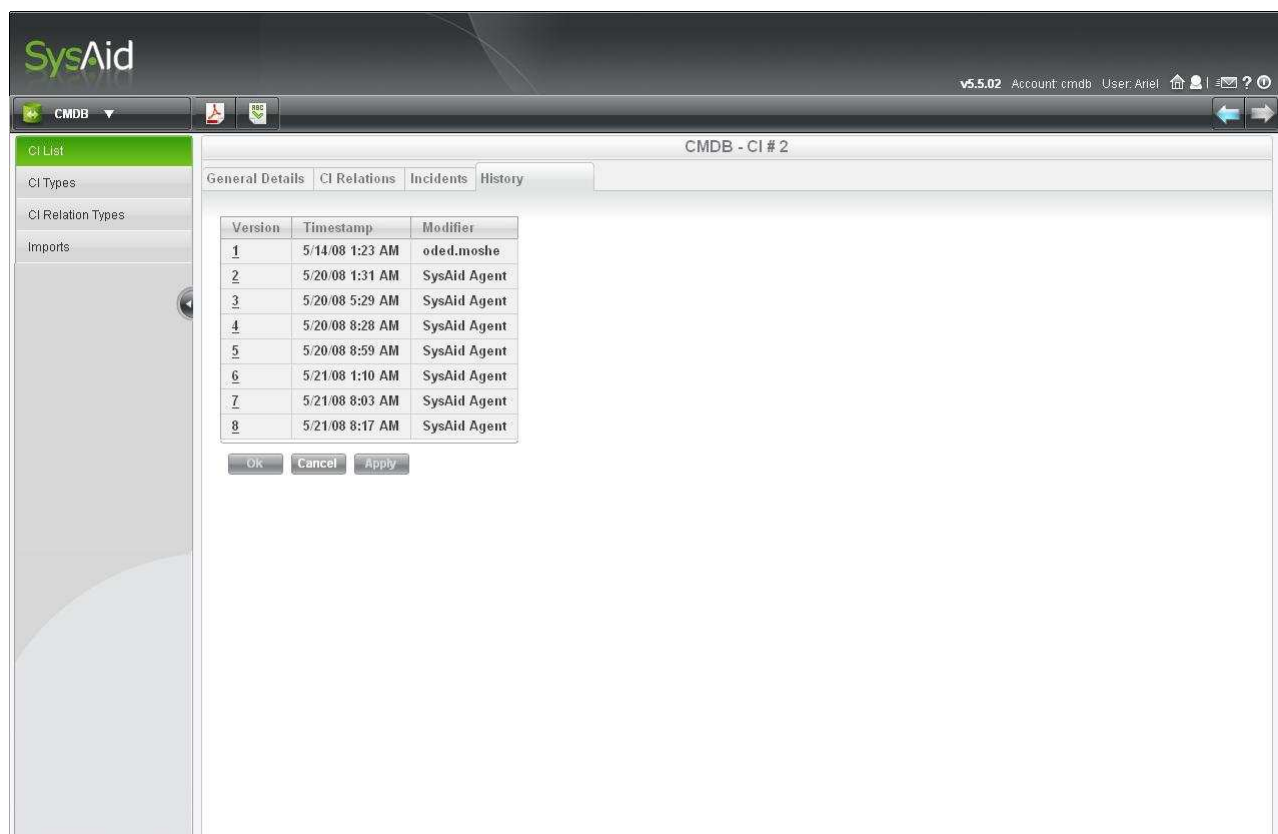
To do so, go to:


**Helpdesk** -> click the row entry of the service request you wish to attach  
-> **Business Impact** tab -> Choose CI to attach to the SR.

This process is similar to manually attaching an asset to a service request.

Under the **History** tab you can see all the changes in the CI. For instance, if you change the status of the CI, the change and the date will be recorded in the history of the CI. Note that the changes recorded are only changes that were made inside the SysAid CMDB module.

**Figure 6: CI History tab**



You can check the previous versions (before changes were made in the CI) by clicking the version number under the **Version** column. In addition, you can search and filter this list, as is usual with SysAid lists, by clicking the **Customize**  icon.

### CI Types-

In this page you see a table with eight pre-defined CI types. Note that three of them cannot be deleted: Asset, software Product, and Catalog Item. If you add more CI types, they will be listed here.

If you click any of the row entries you will reach a screen in which you can add a description of the CI type.

### CI Relation Types-

In this screen you can see another list, a list of CI relation types. There are six pre-defined types of relations in this list, and you can add as many as you need. Two of the six relations cannot be deleted- the relation type Consists/Part of, and the relation type Contains SW/Installed on.

The pre-defined CI relation types are:

Consists/Part of

Contains SW/Installed on

Uses/Used by

Connected to/Connected to

Can access/Accessed by

Affects/Affected by

As you see, each CI relation type has two directions- the active and the passive relation. This means that if a certain software, let's say MS Word, for instance, is installed on one of your network workstations, the relation type between MS Word and that workstation will be Contains SW/Installed on. When you will look at that workstation on your SysAid CMDB, you will see that CI contains MS Word. Similarly, when you will check in your SysAid CMDB the software MS Word, you will see this workstation listed as one of the CIs it is installed on.

## CI Relations Graph

Under each CI in your SysAid CMDB module, you can find a CI Relations Graph tab. Opening this tab will allow you to see a visual representation of all the relations of that CI, in the three closest levels of relations.

A dropdown menu at the top of the page allows you to choose between three views: a display of all the CI affected by the CI in question, a display of all the CIs this CI affects, or a general view with all the relations of that CI.

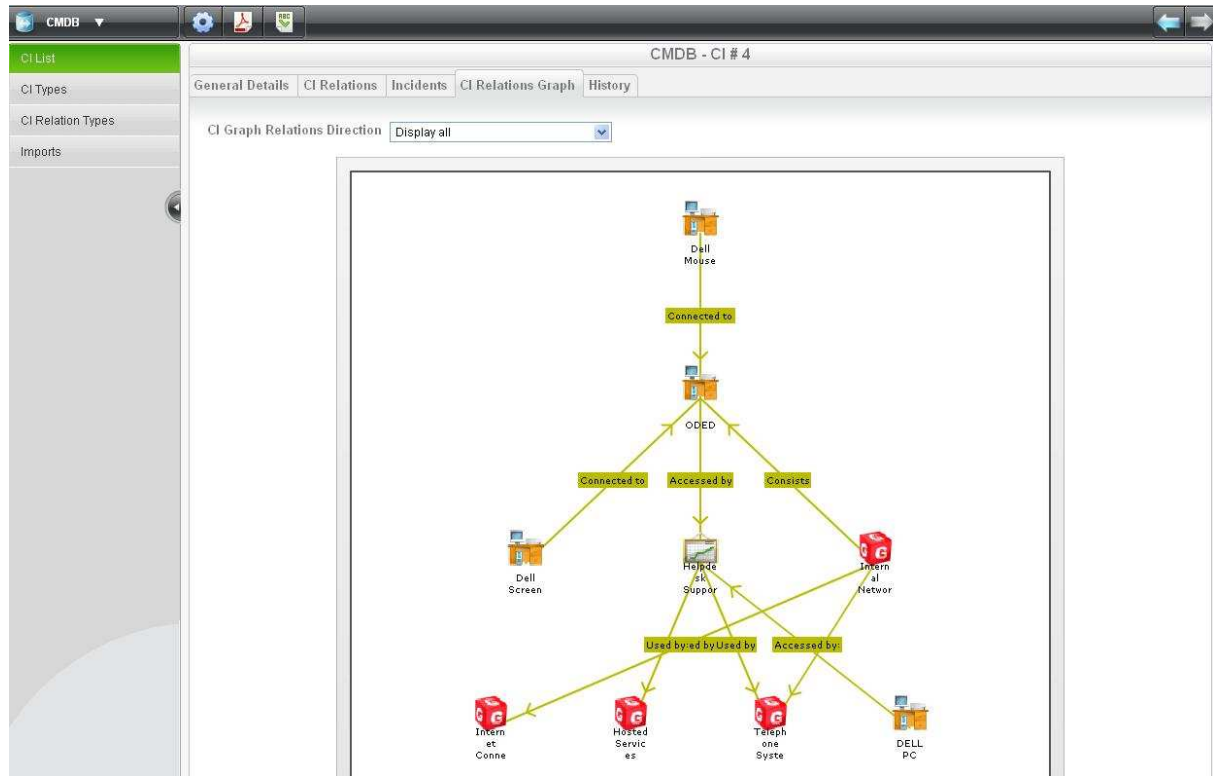
The CI in question will always appear at the top of the chart, and if you move your mouse over the different CIs, you will be able to see their full captions.

To move to a different Configuration Item in your CMDB, simply click its icon in the chart. A new popup screen will open, with a view of the relations of that CI. You can keep clicking on CIs in your graph to further investigate their relationships to other CIs in all levels.

To print the graph, move the mouse away from the icons of the CIs, and right click it. You will be able to choose the option 'Print Chart'.

By right clicking your mouse while not standing on any CI icon, you can also choose to enable dragging the icons in the chart to see them where you prefer, or to choose to be able to navigate to each CI by clicking its icon. Right-click your mouse and then choose 'Enable Drag' or 'Enable Link'.

**Figure 7: CI Relations Graph**



## CI Imports-


SysAid allows you to import all your network assets, your software products and your catalog items into the CMDB. There are three ways in which you can import assets.

A.

1. Go to **System** -> **My Network Assets**
2. Click one of the assets -> Open the CMDB tab
3. Under the CMDB tab you can create a connection to the CI item already defined for this asset.
4. Click the **Change** button to choose a CI from the list.

This option is available only when a CI has already been defined and should be identified as a certain asset.

B.

1. Go to CMDB  -> Import screen
2. Click the appropriate button according to the CI type you wish to import: asset, SW product or catalog item.

This option is useful when you already have SysAid and wish to start using the CMDB with your existing data.

C. Go to Preferences -> CMDB Settings

Here you can set that whenever a new asset is added to SysAid, whether through the SysAid agent or manually, it will automatically create an equivalent CI in the SysAid CMDB. Similarly, you can set that whenever an asset is deleted, the relevant CI will be deleted as well. Note that this option is not recommended, though, since whenever a CI is deleted, all its relations are deleted along with it. This a similar outcome to that of deleting a project in the SysAid Tasks and Projects module: as a result all the tasks of the deleted project are deleted.


## SysAid CMDB Scenarios

To better understand how the SysAid CMDB module can help you with your work, following is a common scenario in which the CMDB capabilities are exploited for your maximum advantage.

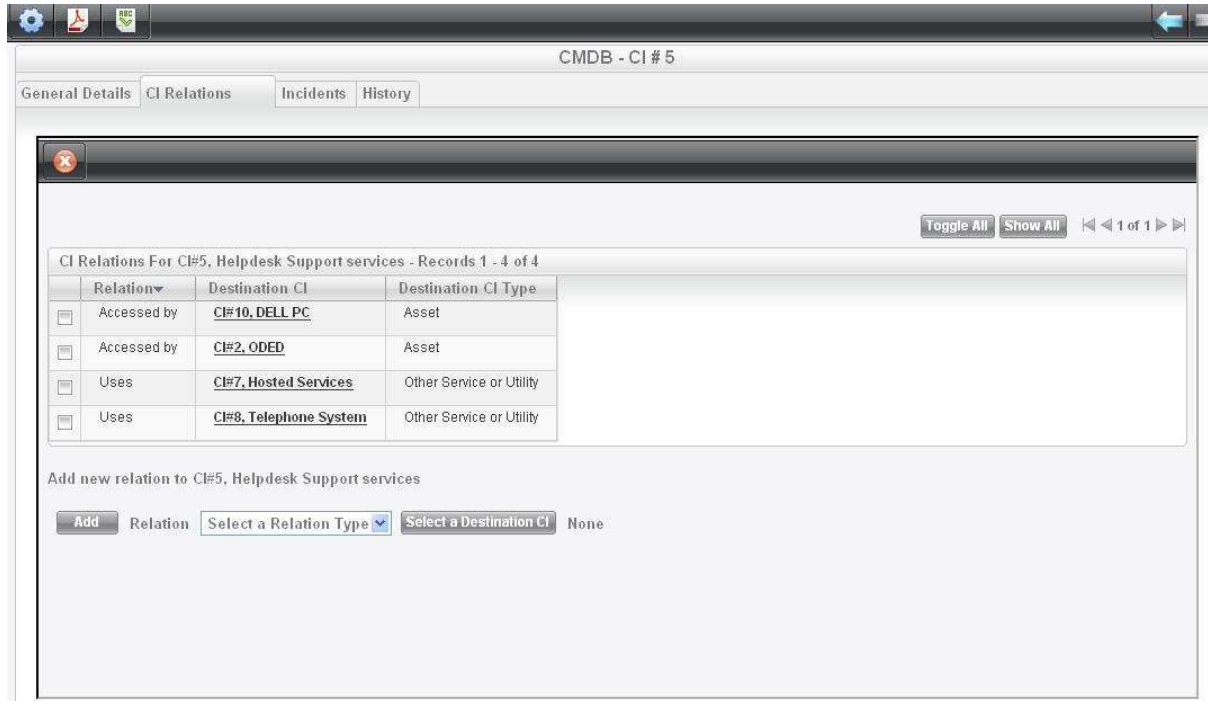
### Pre-Defined Elements:

1. In our SysAid CMDB module, we have defined “Helpdesk and Support services” as a Configuration Item, belonging to a type “Business Process”.
2. Our SysAid CMDB module includes a few CIs of the following types: PCs, software products, printers, utilities, business processes. We have added these CIs manually.
3. CIs Relations should be defined by the administrator. In each CI, under **CI Relations** tab, you can determine a relation to another CI, simply by selecting the relation type from the dropdown menu, and the related CI from your CI list.

### Example-

From the left main menu we choose the CMDB module , and then we click on the row entry of CI no. 5, the business process, “Helpdesk and Support services”. In the page for CI#5, under the **CI Relations** tab, you can see what other CIs are related to the helpdesk and support services, and what utilities this business process employs. In our example the helpdesk services employ the utilities: telephone, and hosting services. The assets used for this business process are the PCs CI#10 and CI#2.

**Figure 8: Example- Helpdesk and Support services CI Relations**



In our example the person working on a PC which is defined in our CMDB as CI#2 has encountered a problem, and sends a service request to the helpdesk. The administrator who received the service request updated the state of that CI, to indicate the computer is out of order.

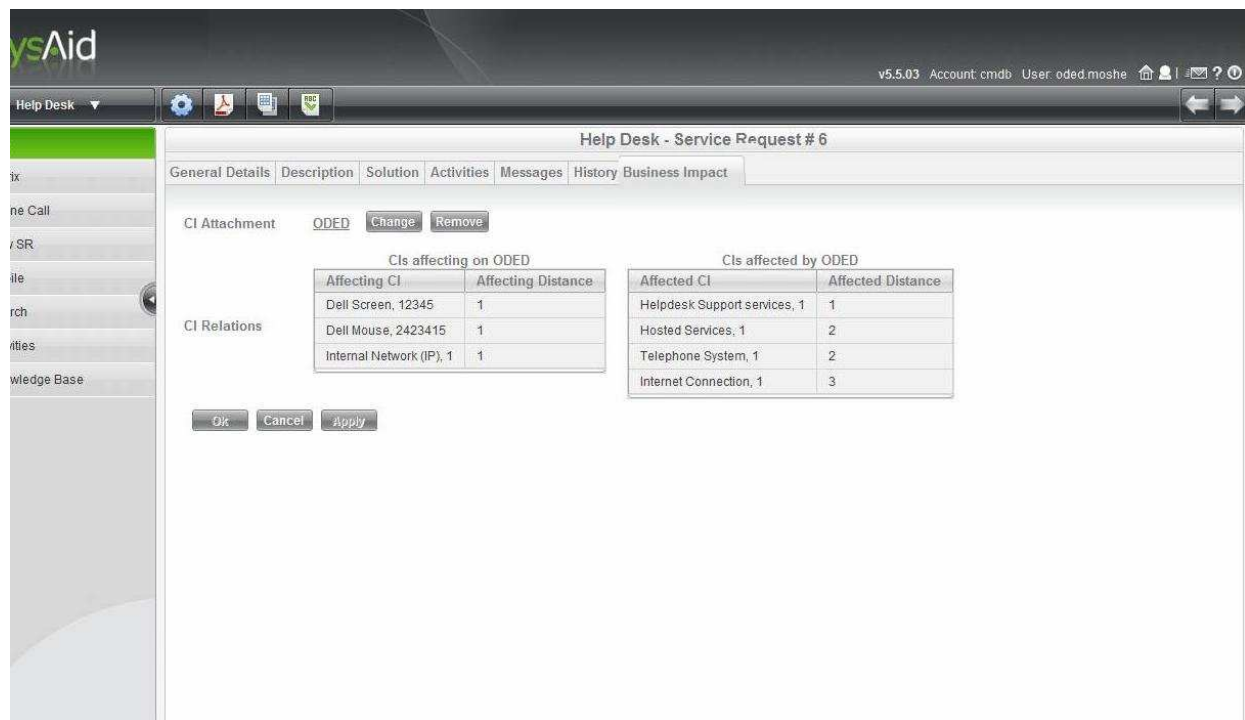
Now you are able to see the business impact this failure will cause a difficulty in the helpdesk services. Only the computer CI#10 will be now available for helpdesk services. Taking care of the problem in CI#2 may be more urgent than you have estimated...

## Another Example

Here is another example of how to use the CMDB for your advantage:

A service request arrives at your helpdesk, complaining that a certain PC in your network is out of order.

**Figure 9: Business Impact tab in the Helpdesk**



The end user who sent the SR has attached this PC to his service request. You can see the attached asset under **Helpdesk**-> click the entry of the SR -> **Business Impact** tab.

If all your CIs and their interrelations are set in your SysAid CMDB, you will be able to see all the other CIs affected by the malfunction of this PC.

Let us say that the PC in question is the only one in your network on which an accounting software is installed. The accounting software is also defined as a CI in your CMDB, so you will be able to view it simply by clicking the name of the PC that is out of order, as one of the software used by this asset.

Now you are able to know no one will be able to use the accounting software,

until you fix the problem with the PC.

What is the business impact of this problem and how urgent is it? Click the CI of your accounting software. Let us say that you have defined this software as used for your billing process. You will be able to see this under the CI of the software, in your CMDB.

Now you know that if you do not fix the problem reported on in the SR you just got, the only PC in your network on which your accounting software is installed will stay out of order, which will harm your billing process. It will be a good idea to take care of the problem immediately, then!

This is how the CMDB helps you determine your work schedule and your priorities.