

Configuration Management

Add/Edit Configuration Item (CI) Procedure

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Process Owner:
XXXXXXXXXXXXXXXXXXXXX
Infrastructure Operations

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1 Purpose

The purpose of this document is to define work instructions for the creation and editing of Configuration Items (CIs).

The goals of this procedure are:

- To ensure that the instructions for creating and editing of CIs are standardized.
- To provide a reference document for the Configuration Management team and process owner about creating and editing CIs.
- To provide requirements that can be used when process compliance is evaluated.

2 Scope

This procedure comprises work instructions for tasks executed by the Configuration Management Operational Maintenance and Efforts (OME) team that fall within:

- actions 7 and 15 of the Configuration Management cross-functional map
- steps 7a, 7d-7e, 11g, 15a, and 16a of the Configuration Management detailed workflow
- line items 4-6, 16-17 of the Configuration Management authority matrix

3 Procedure Steps

The following steps are executed as a part of the Configuration Management process.

3.1 Step 7a – Create new CI (status = inactive)

Policies

Configuration Management Documentation Policy
Configuration Management Naming Conventions Policy
Configuration Management Relationships Policy

Instructions

1. Log into Service Desk/CA CMDB.
2. Select **File > New Configuration Item**.
3. Following naming conventions established in [name of document], enter the name of the CI.
4. Assign a class either by entering a class name OR by clicking **Class** to open a new window.

NOTE: Setting the status as **Inactive** renders certain classes unavailable.
5. Set the status to **Inactive**.
6. Click **Family**, and select the appropriate family classification.

7. Click **Search**, and select the appropriate class.
8. Where available, enter relevant data in the other fields, then click **Continue**.
9. Confirm status as **Inactive**.
10. As applicable, enter the appropriate information in the following tabs, then click **Save**:
 - Attributes
 - Inventory
 - Service
 - Location
 - Contacts
 - Impact Analyzer (dropdown menu)
11. Click **CMDB Relationships**, and then click **Add Relationship**.
12. Select **Provider CI/Peer CI**.
13. Enter search criteria, click **Search**, then choose the appropriate CI.
14. Select **Active** status.
15. Specify the relationship type between the two CIs, click **Save**, then click **Close Window**.
16. To add an organization, click **Update Organizations**.
17. In the pop-up window, enter search criteria, then click **Search**.
18. Choose the organization(s) from the list, add them by clicking the double arrows (>>), and click **OK**.

NOTE: Incidents, Problems, Requests, Change Orders, and Issues will be populated automatically.

19. Click **Edit**, and in the **Notes** field, enter the following:
 - Date (mm/dd/yyyy)
 - Name of person entering CI

EXAMPLE: 12/02/2008 – Created by FirstName LastName

20. Click **Save**.

Tips

- Organizations and Relationships will not display in View Mode unless the CI is set to **Active**. They will display in Edit Mode.
- All required fields are marked in green with an asterisk (*).

3.2 Step 7b/15c – Perform peer review/Peer review of CI

Policies

Configuration Management Documentation Policy
Configuration Management Naming Conventions Policy
Configuration Management Relationships Policy

Instructions

1. Log into Service Desk/CA CMDB.
2. If you know the family, expand **Configuration Items**, select the appropriate family, and browse to the relevant CI.
3. Select the correct CI, and click **Edit**.
4. Confirm all relevant fields are completed and correct.
NOTE: Required fields will vary based on CI type.
5. If one or more fields are not completed or are incorrect, click **Edit**, and in the **Notes** field, enter the following:
 - Date (mm/dd/yyyy)
 - Name of person reviewing CI**EXAMPLE:** 12/02/2008 – Reviewed by FirstName LastName
6. Click **Save**.
7. Email the creator/modifier of the CI with a list of inaccuracies for correction and further review.
8. If all fields are completed and correct, proceed to Step 7d (Activate CI) or 15e (Close the SR) of the Detailed Workflow as appropriate.

3.3 Step 7d – Activate CI record (status = active)

Policies

Configuration Management Documentation Policy

Instructions

1. Log into Service Desk/CA CMDB.
2. If you know the family, expand **Configuration Items**, select the appropriate family, and browse to the relevant CI.
3. Select the correct CI, and click **Edit**.
4. Set the status to **Active**, then click **Continue**.
5. Confirm status as **Active**.
6. Select **Active** status.
7. Click **Edit**, and in the **Notes** field, enter the following:
 - Date (mm/dd/yyyy)
 - Name of person activating CI**EXAMPLE:** 12/02/2008 – Activated by FirstName LastName

Tips

8. Click **Save**.
- To search for a CI, select one of the following from the **Search** dropdown menu:
 - CI by name
 - CI by IP
 - CI by license number
 - CI by serial number
 - You can also click **Search** in the toolbar, and select **Configuration Items**. Enter the relevant information in the search fields, and click **Search**.

3.4 Step 7e – Make correction

Policies

Configuration Management Documentation Policy
Configuration Management Naming Conventions Policy
Configuration Management Relationships Policy

Instructions

1. Log into Service Desk/CA CMDB.
2. If you know the family, expand **Configuration Items**, select the appropriate family, and browse to the relevant CI.
3. Select the correct CI, and click **Edit**.
4. Where available, enter relevant data in the other fields, then click **Continue**.
5. Confirm status as **Active**.
6. Select **Active** status.
7. Click **Edit**, and in the **Notes** field, enter the following:
 - Date (mm/dd/yyyy)
 - Name of person modifying CI

EXAMPLE: 12/02/2008 – Modified by FirstName LastName.
8. Click **Save**.

Tips

- To search for a CI, select one of the following from the **Search** dropdown menu:
 - CI by name
 - CI by IP
 - CI by license number
 - CI by serial number

- You can also click **Search** in the toolbar, and select **Configuration Items**. Enter the relevant information in the search fields, and click **Search**.

3.5 Step 11g – Make note in CI record

Policies

Configuration Management Documentation Policy
 Configuration Management Naming Conventions Policy

Instructions

1. Log into Service Desk/CA CMDB.
2. If you know the family, expand **Configuration Items**, select the appropriate family, and browse to the relevant CI.
3. Select the correct CI, and click **Edit**.
4. In the **Notes** field, enter the following:
 - Date (mm/dd/yyyy)
 - Name of person modifying CI
 - The relevant note information

EXAMPLE: 12/02/2008 – Modified by FirstName LastName – Known issue in CI causes such-and-such error.
5. Click **Save**.

Tips

- The Notes in a CI record should be spaced separately from the Created/Modified/Activated Notes for clarity.

3.6 Step 15a – Modify CI record

Policies

Configuration Management Documentation Policy
 Configuration Management Naming Conventions Policy
 Configuration Management Relationships Policy

Instructions

1. Log into Service Desk/CA CMDB.
2. If you know the family, expand **Configuration Items**, select the appropriate family, and browse to the relevant CI.
3. Select the correct CI, and click **Edit**.
4. Where available, enter relevant data in the other fields, then click **Continue**.
5. Confirm status as **Active**.
6. Select **Active** status.
7. Click **Edit**, and in the **Notes** field, enter the following:
 - Date (mm/dd/yyyy)
 - Name of person modifying CI

EXAMPLE: 12/02/2008 – Modified by FirstName LastName.

8. Click **Save**.

Tips

- To search for a CI, select one of the following from the **Search** dropdown menu:
 - CI by name
 - CI by IP
 - CI by license number
 - CI by serial number
- You can also click **Search** in the toolbar, and select **Configuration Items**. Enter the relevant information in the search fields, and click **Search**.
- The Notes in a CI record should be spaced separately from the Created/Modified/Activated Notes for clarity.

3.7 Step 16a – Update CI record and set status to “inactive”

Policies

Configuration Management Documentation Policy

Instructions

1. Log into Service Desk/CA CMDB.
2. Select **File > New Configuration Item**.
3. Set the status to **Inactive**, then click **Continue**.
4. Confirm status as **Inactive**.
5. Select **Inactive** status.
6. Click **Edit**, and in the **Notes** field, enter the following:
 - Date (mm/dd/yyyy)
 - Name of person deactivating CI

EXAMPLE: 12/02/2008 – Deactivated by FirstName LastName.

7. Click **Save**.

Tips

- Organizations and Relationships will not display in View Mode unless the CI is set to Active. They will display in Edit Mode.

4 Definitions

Activated by – used to indicate the Configuration Management team member who has deemed that the CI has successfully passed a peer review, and has enabled the CI’s Active status.

Created by – used to indicate the Configuration Management team member who initially created an entry in the CMDB for a given CI and entered its preliminary information.

Deactivated by – used to indicate the Configuration Management team member who has disabled the CI’s Active status.

Reviewed by – used to indicate the Configuration Management team member who has determined that a CI has not passed a peer review due to one or more inaccuracies or incomplete fields, and has notified the CI’s creator or modifier of the inaccuracies for correction and further review.

5 Document References

The following documents are referenced in this procedure:

Process Management Authority Matrix

6 Revision Log

| Change History | | | |
|----------------|------------|-----------------|------------------------|
| Version | Date | Changed By | Description |
| 0.1 | 2008-12-04 | Michelle Travis | Initial draft created. |
| | | | |

| Review History | | | |
|----------------|------|-------------|-------------|
| Version | Date | Reviewed By | Description |
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| Approval History | | | |
|------------------|------|-------------|-------------|
| Version | Date | Approved By | Description |
| 1.0 | | | |
| | | | |