Step-by-Step Guide to Building a CMDB

Malcolm Fry
ITIL Advisory Group Member
Our Objectives When Building This Book

› A recipe, a guide, a workshop manual for experienced IT professionals

› A full projected approach

› Customizable to meet all needs and all levels

› A consultant in a book

› Not just a book but also a project template

› A carry out
Five Stages

Stage 1: Assemble the project team and define the project

Stage 2: Define requirements

Stage 3: Finalize plan and select technology

Stage 4: Construct and maintain your CMDB

Stage 5: Communicate ongoing value and drive continuous improvement
Step-by-Step CMDB Flow

1. Identify project team members, define roles and responsibilities
2. Obtain CMDB knowledge
3. Review and agree on CMDB goals and mission statement
4. Review, define and communicate the expected benefits
5. Build a business case
6. Review and identify governance requirements
7. Review and select supporting best practices
8. Identify and address potential problems
9. Identify asset and inventory requirements
10. Define Service Catalogue CMDB requirements
11. Define requirements for other processes
12. Define Configuration Item level - IT Service Model
13. Define Configuration Item relationships
14. Define Configuration Item attributes
15. Design IT Model Blueprint
16. Select technologies for your CMDB
17. Finalize the scope and plan the expansion
18. Calculate and present ROI
19. Construct your CMDB
20. Select tool to automate CMDB population
21. Populate your CMDB
22. Create CI Lifecycle Management process
23. Build supporting processes
24. Train the CMDB team
25. Identify and install metrics
26. Create a continuous service improvement program
At the end of this step, the key members of the CMDB creation team will be fully conversant with all aspects of a CMDB, including structure, terminology, scope, relationships with other IT processes, benefits and an understanding of the tasks required to build a CMDB. As a key objective, the key members must achieve at least the ITIL Foundation certification level of education.
Obtain CMDB Knowledge: The Flow

1.1 ITIL Foundation education for key project team members
1.2 Decide the scope of the CMDB education
1.3 Build a project Resource Reference Library (RRL)
1.4 Identify and evaluate books and publications
1.5 Circulate books and other publications
1.6 Identify and evaluate Internet sources
1.7 Circulate Internet reference locations
1.8 Identify and evaluate societies
1.9 Join appropriate societies and attend meetings
1.10 Identify and evaluate education companies
1.11 Identify and attend courses
1.12 Identify and evaluate conferences and seminars
1.13 Attend conferences and seminars
1.14 Check that all project members have the required CMDB education
Stage 1. Assemble the project team and define the project

Step level

Step 1 – Identify the project team
Step 2 – Obtain CMDB knowledge
Step 3 – Develop CMDB project goals and mission
Step 4 – Detail CMDB project benefits
Step 5 – Develop business case with ROI

Task level

Task 1 – Create Project Executive Board
Task 2 – Select Project Manager
Task 3 – Design Project
Task 4 – Select Project Team
Task 5 – Finalize Project
Five Stages

Stage 1: Assemble the project team and define the project

Stage 2: Define requirements

Stage 3: Finalize plan and select technology

Stage 4: Construct and maintain your CMDB

Stage 5: Communicate ongoing value and drive continuous improvement
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Governance Layers

**Governance**

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<thead>
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<th>Government</th>
<th>Industry</th>
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</thead>
<tbody>
<tr>
<td>• Sarbanes-Oxley</td>
<td>• Basel II - finance</td>
</tr>
<tr>
<td>• Data Protection</td>
<td>• HIPPA - health</td>
</tr>
<tr>
<td>• Freedom of Information</td>
<td>• 21 CFR 11 - pharma</td>
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<td>• Best practices</td>
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<tr>
<td>• Corporate image</td>
<td>• Technical Standards</td>
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<tr>
<td>• Financial management</td>
<td>• Development</td>
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</table>
Frameworks and Methodologies

ISO20000/ BS15000

CMM

SIX SIGMA

COBIT

ITIL

Business Process Models

Governance
Configuration Item Level

The degree of detail selected to describe a unique entity:

Single CI?

Multiple CIs?

Too much granularity = Too difficult to maintain
Too little granularity = Low usage levels
Attributes

The relevant characteristics or features that distinguish one CI from another:

- **Mandatory**
  - Essential attributes
  - Governance
  - Financials
  - Licence data
  - Inventory / Asset
  - Business identifier
  - Primary relationships

- **Supporting**
  - Descriptive attributes
  - Service
  - Department
  - Secondary relationships
  - Licence data

- **Complimentary**
  - Requested attributes
  - Business attributes
  - Related Service Management attributes
  - Other relationships
# Vital Role of the CMDB

## Service Level Management
1. Requires all service level agreement (SLA) components to be entered
2. Allows referencing of SLAs
3. Provides reference point for underpinning contracts
4. Shows customer ownership
5. Serves as a vital component for the Service Improvement Program

## Capacity Management
1. Enables each CI to be a potential Capacity Management candidate
2. Provides resources for capacity modelling
3. Shows related CIs in a capacity grouping
4. Provides vital risk-analysis data
5. Reduces time needed to resolve capacity-related incidents and problems

## Availability Management
1. Provides vital business impact data
2. Applies Availability Management to all CIs in CMDB
3. Shows related components in an availability string
4. Provides risk-analysis data
5. Helps isolate which CIs are the root cause of availability failures

## Financial Management
1. Shows which CIs are used for each service provided to customers
2. Provides chargeback components
3. Provides important governance information
4. Provides a vital source for inventory/asset audit
5. Serves as an important tool for financial calculations — e.g., budgets and forecasting

## Business Continuity Management
1. Shows which CIs are used for each service provided to customers
2. Indicates how changes in CI status could mean changes in continuity requirements such as when a low-priority system becomes higher priority due to a change of system functionality
3. Identifies potential continuity outages
4. Provides feedback data to customers during outages
5. Shows status of CIs as they become active after an outage

## Problem Management
1. Populates problem records automatically
2. Provides status of configuration items
3. Offers risk-analysis data for priorities
4. Provides ownership data
5. Presents data for proactive problem analysis

## Service Desk
1. Identifies missing configuration items
2. Populates records automatically when the Service Desk records incidents
3. Provides proactive notifications to users
4. Provides feedback to customers about CMDB changes
5. Assists configuration management with CMDB audit

## Incident Management
1. Populates records automatically
2. Provides status of configuration items
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4. Provides impact data for priorities
5. Provides escalation data

## Change Management
1. Shows CIs that are in the change management process
2. Provides risk-analysis data
3. Shows which other components could be affected by a change
4. Enables communication to users related to a pending change
5. Reflects the new status immediately after a change

## Release Management
1. Tracks rollout status
2. Keeps version details for software
3. Verifies tested configurations
4. Provides detailed information to ensure successful release
5. Provides data for financial impact of releases

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## CMDB Factor – Service Delivery

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Final Scoping Objective

Scope of the infrastructure to be covered by the CMDB:

- The range of responsibility covered by Configuration Management as defined by the Infrastructure:
  - Hardware
  - Software
  - Telecommunications
  - People
  - Documentation
  - Etc.

- There are limiting factors that may affect the final scoping of your CMDB. Typically, these will include:
  - Cost / Time
  - Practicality
  - Business Practices
  - Ownership / Geography
  - IT Structure
  - Etc.

Only you can determine your CMDB final scoping
Stage 4: Construct and Maintain Your CMDB

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Create CI Lifecycle Management Process: Goals

› So far, steps have concentrated on designing a CMDB, whereas this step concentrates on having controls and processes in place for new CIs to be added to an existing CMDB. Below is an illustration of the lifecycle of a typical hardware CI:

› The goal is to define a lifecycle plan for each of the CI types, or Data Models, and then document how each step will be performed and controlled.

| Request for new equipment (RFC) | Request authorized | Order placed | Equipment delivered | Equipment tested | Equipment installed | Equipment maintained | Equipment retired |
The Lifecycle of a Configuration Item

- Request for new equipment
- Request authorized
- Order placed
- Equipment delivered
- Equipment tested
- Equipment installed
- Equipment maintained
- Equipment retired
CI Lifecycle Management: Updating

Changing the Configuration Item

<table>
<thead>
<tr>
<th>New CI created</th>
<th>Update CI</th>
<th>Update CI</th>
<th>Update CI</th>
<th>Update CI &amp; relationships</th>
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CI Lifecycle Management: Responsibility

Updating the Configuration Item

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CI Lifecycle Management: Attributes (ITIL)

- New CI created
- Update CI
- Update CI
- Update CI
- Update CI & relationships
- Update CI & relationships
- Update CI
- Close CI

- Request for new equipment
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- IT
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CI Lifecycle Management: Control (COBIT)

Attributes (ITIL)

- New CI created
- Update CI
- Update CI
- Update CI
- Update CI & relationships
- Update CI & relationships
- Update CI
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- Request for new equipment
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- IT
- Finance
- Purchasing
- Receiving
- IT
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Controls (COBIT)
Stage 5: Communicate Ongoing Value and Drive Continuous Improvement

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20. Select tool to automate CMDB population
21. Populate your CMDB
22. Create CI Lifecycle Management process
23. Build supporting processes
24. Train the CMDB team
25. Identify and install metrics
26. Create a continuous service improvement program
A Project Approach is the Answer
Step-by-Step CMDB Flow

1. Identify project team members, define roles and responsibilities
2. Obtain CMDB knowledge
3. Review and agree CMDB goals and mission statement
4. Review, define and communicate the expected benefits
5. Build a business case
6. Review and identify governance requirements
7. Review and select supporting best practices
8. Identify and address potential problems
9. Identify asset and inventory requirements
10. Define Service Catalogue CMDB requirements
11. Define requirements for other processes
12. Define Configuration Item level - IT Service Model
13. Define Configuration Item relationships
14. Define Configuration Item attributes
15. Design IT Model Blueprint
16. Select technologies for your CMDB
17. Finalize the scope and plan the expansion
18. Calculate and present ROI
19. Construct your CMDB
20. Select tool to automate CMDB population
21. Populate your CMDB
22. Create CI Lifecycle Management process
23. Build supporting processes
24. Train the CMDB team
25. Identify and install metrics
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### Team Approach

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<tr>
<th>Steps</th>
<th>Time Periods</th>
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<td><strong>Stage 1: Assemble the project team and define the project</strong></td>
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<tr>
<td>Step 1: Identify project team members, define roles and responsibilities</td>
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<tr>
<td>Step 2: Obtain CMDB knowledge</td>
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<td>Step 3: Review and agree on CMDB goals and mission statement</td>
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<td>Step 4: Review, define, and communicate the expected benefits</td>
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<td>Step 5: Building a business case and projecting ROI</td>
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<td>Step 6: Review and identify governance requirements</td>
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<td>Step 24: Train the CMDB team</td>
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<td><strong>Stage 5: Communicating ongoing value and driving continuous improvement</strong></td>
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<td>Step 25: Identify and install metrics</td>
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<td>Step 26: Create a continuous service improvement program</td>
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The HEROES

Maria Ritchie, Michael Oas and Angie Massicotte

Ken Turbitt

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Michael Nicoletti

& Elaine Korn, Matthew Selheimer and Kurt Milne
THANKS