

# CA Service Management IT Asset Management

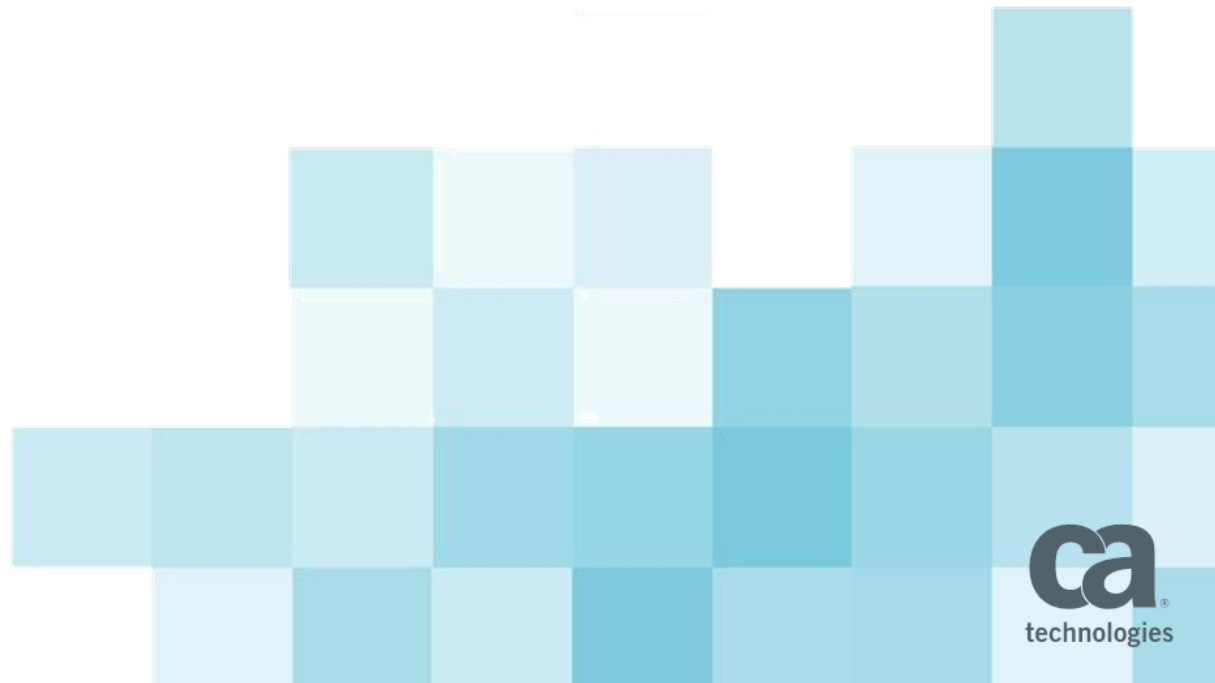
CA Service Management Användargruppsmöte

28<sup>th</sup> April 2016

# Agenda

- Trends and Challenges
- Hardware Asset Management
- Software Asset Management
- Demonstration
- IT Asset Management in a Service Management Context
- It's More Than Technology
- Summary

# Trends and Challenges: Barriers to Business Productivity and Changing User Expectations



# You Face Barriers to Managing IT Assets

## Expectation



What barriers stand between  
your expectation & reality?



**Reality**

# What Keeps You From Delivering Assets Effectively?

Consumer experience is expected in the **workplace**



Siloed information & measurements impede **management decisions**

Disparate tools and processes mean **inefficient teams**



Delays and downtime lead to **frustration**

# You Need to Make the Enterprise More Productive



## Business Consumers

- Make new assets easy to access
- Help me serve myself
- Easily view my assets



## Decision Makers

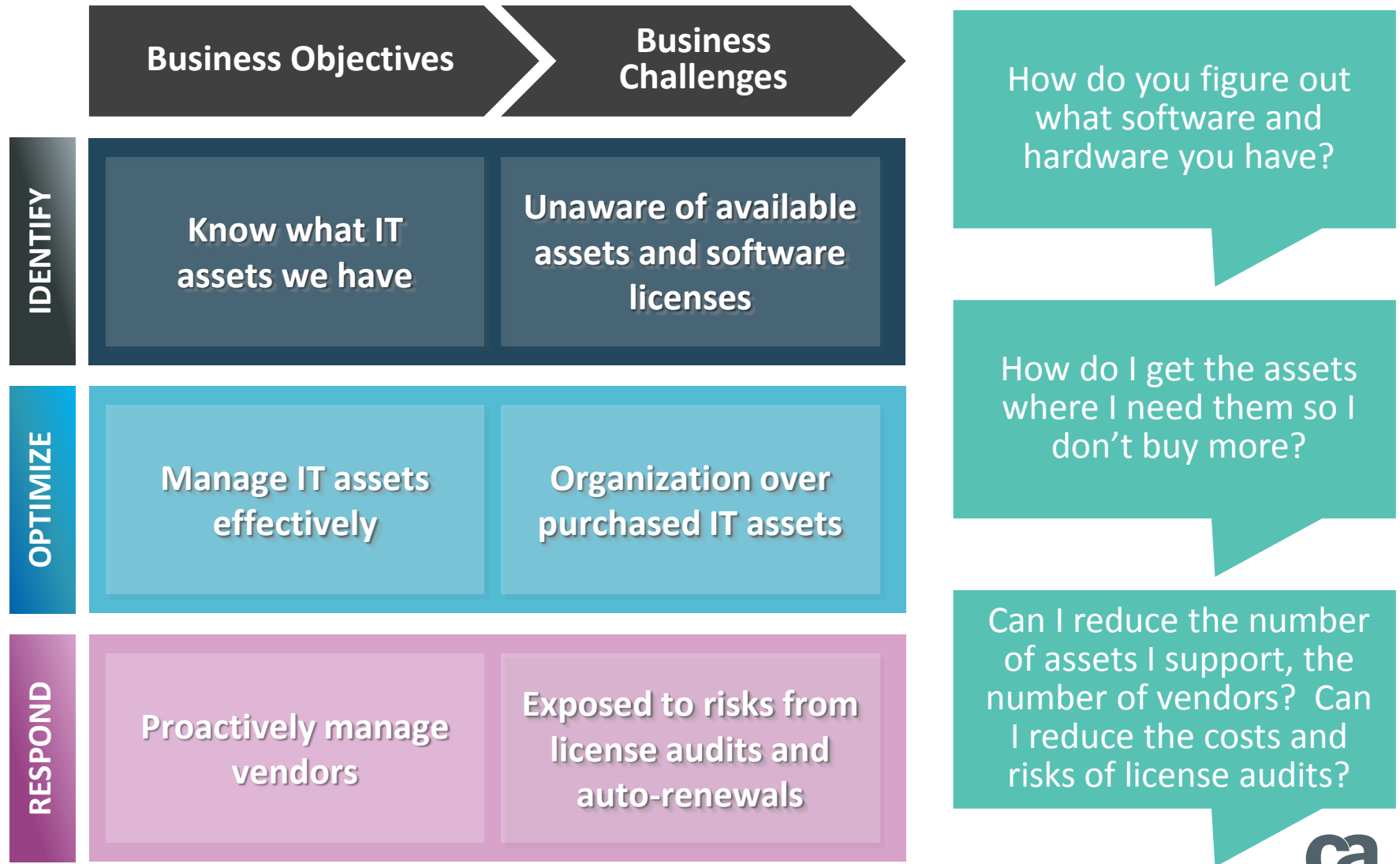
- Insight into and reduce assets costs
- Minimize software compliance risk
- Help me negotiate with vendors



## Power Users

- Get me out of firefight mode
- Standardize my process
- Help me prepare for audits

# IT Asset Management Challenges

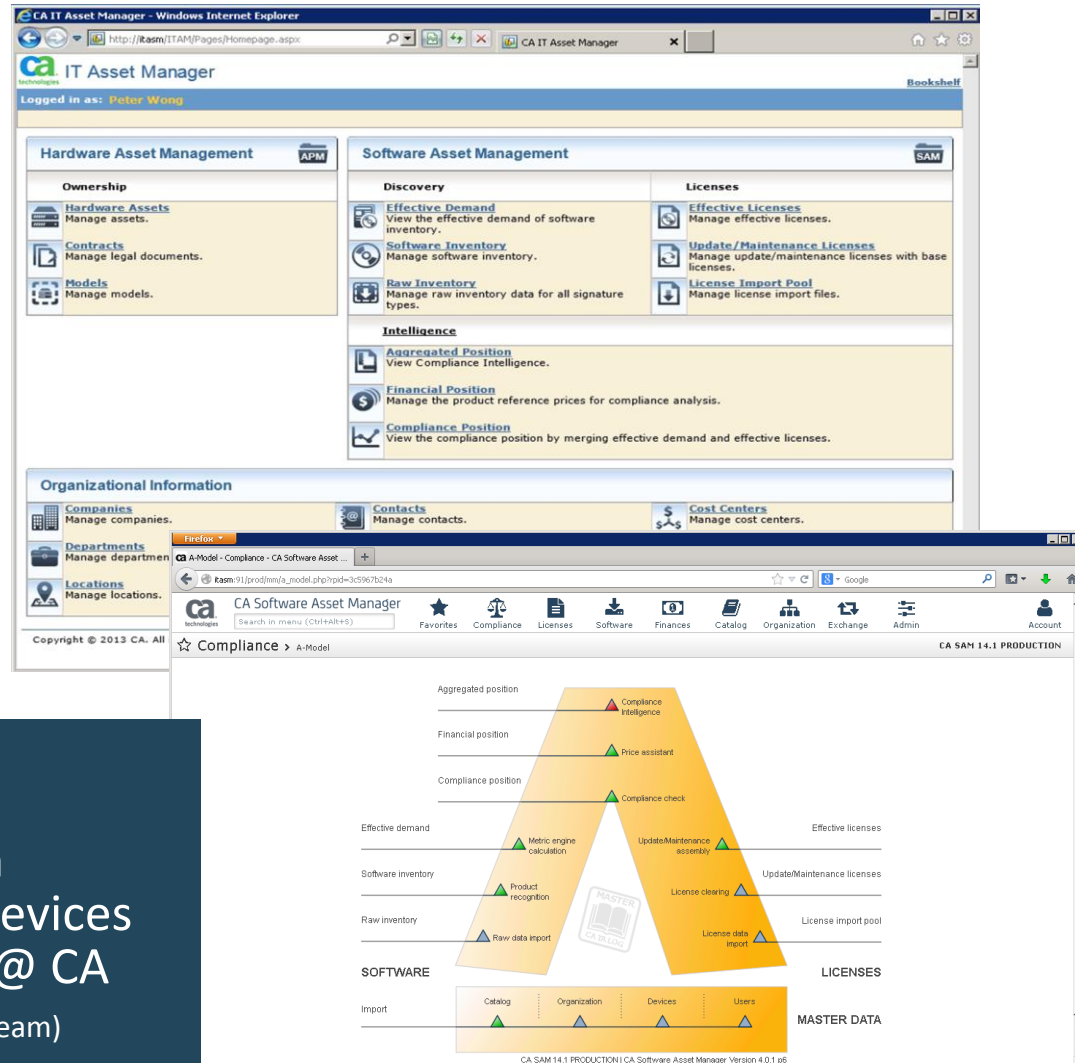


# A Complete Life-cycle Solution

## *Reduce Business Risk & Increase Productivity*

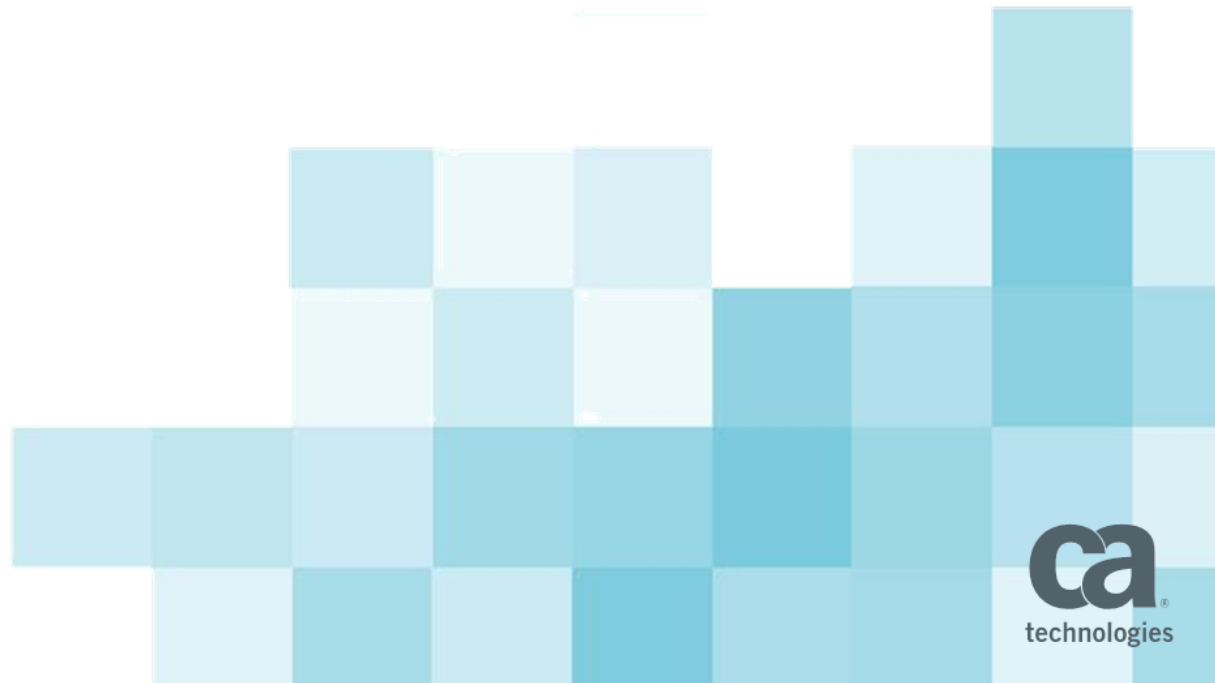
- Comprehensive hardware & software asset lifecycle management
- Maximize the value of your IT assets
- Manage vendors better
- Increase software compliance
- Physical and virtual assets

**\$23 Million**  
 Cost Savings through  
 Management of 137,500 devices  
 across the asset lifecycle @ CA  
 (CA Technologies Asset Management Team)





# Satisfy Your Business Consumers



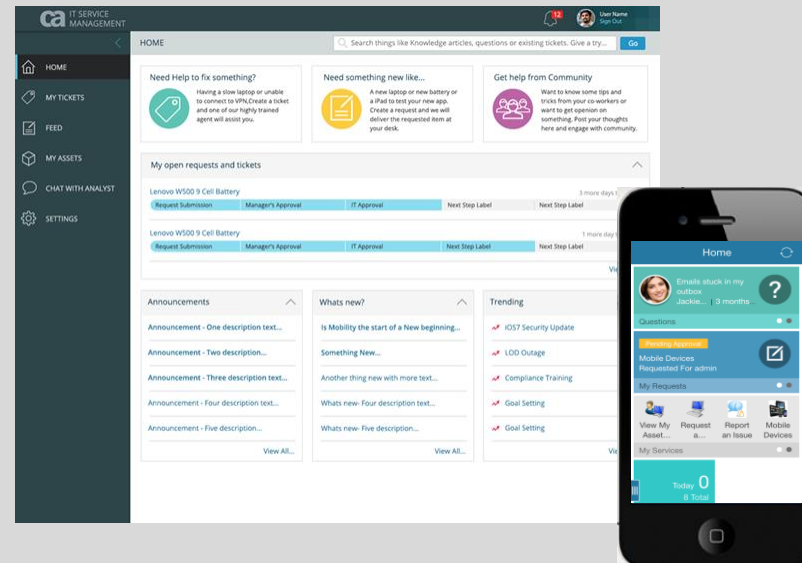
# Satisfy Your Business Consumers

## *Unified Self-service*

### Features

- Single, compelling face-of-IT
- Storefront for consumer-like, one-stop shopping
  - Collaborate
  - Ask questions
  - Search Google, SharePoint, threads, knowledgebase
  - Resolve issues \*\*
  - Request services
  - View assets
- “Quick Value” Content
- Desktop, tablet or mobile phone

\*\* Requires Service Desk



### “Quick Value” Content



**15% to 35%**  
Productivity improvement for  
business consumers\*  
(\*CA ROI and Business Analysis Team)

### Business Value

- Increased user and Analyst productivity
- Increased user satisfaction
- Quicker issue resolution
- Resolve issues \*\* and requests without involving IT or Support Analysts
- Focus on more important tasks

# Satisfy Your Business Consumers

## *"My Resources"*

A single view of all IT resources available to a user

### Resources

IT resources that a user is assigned to or is entitled to use.

Desktops, Laptops, Mobile devices, network devices, software, virtual resources etc.

### Information

Details of resources and actionable information.

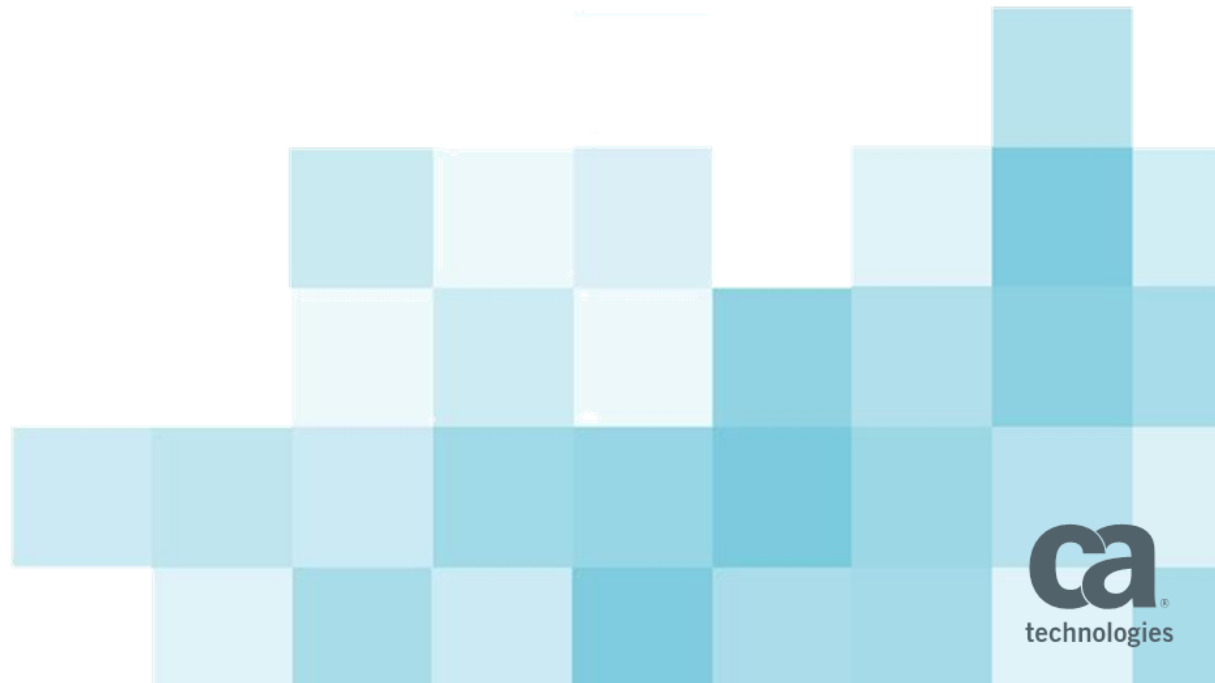
A warranty expiring, maintenance ending, or under utilization.

### Actions

In-context actions that speed up user's tasks.

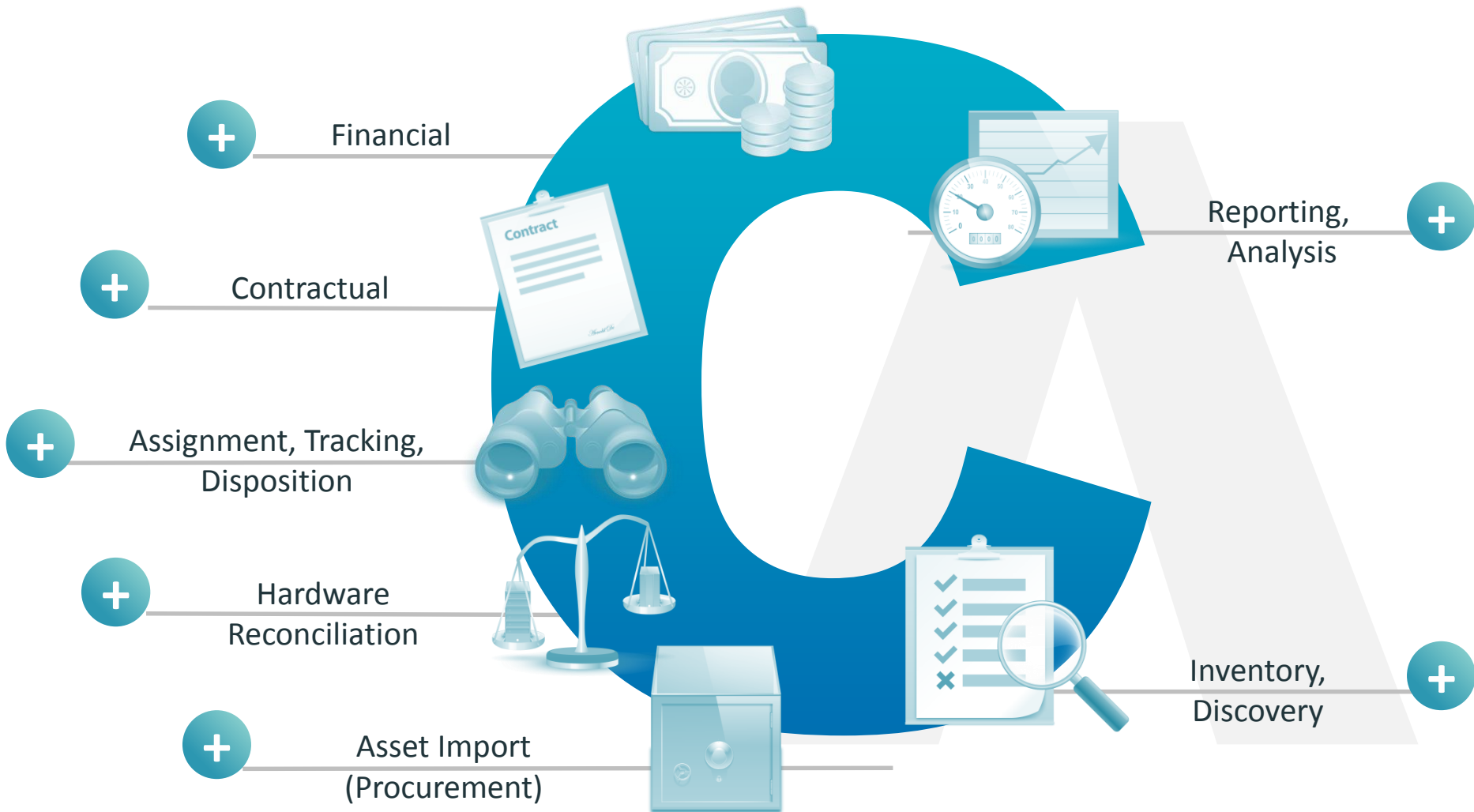
Request related services, report issues or reset password.

# Hardware Asset Management

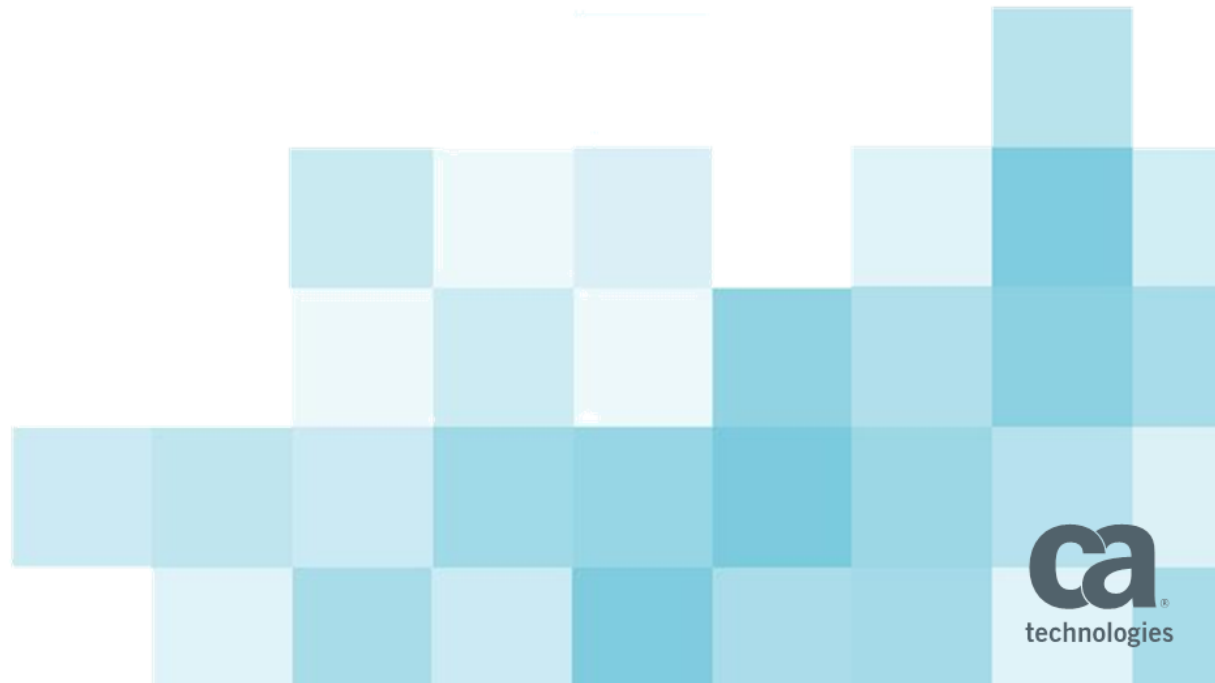


# Hardware Asset Management

## *The “C” Model*



# Software Asset Management



# Software Asset Management Challenges



1 No standards on purchase data

2 Volumes of discovery data

3 Not all licenses created equal

4 Dynamic data, constant change

5 There is no Silver Bullet

6 Out of Compliance

- Fines/penalties
- Public relations
- Unplanned expenses

7 Over Purchases

- Money could be used to fund other key projects
- Additional Maintenance monies coming from already tight budgets

# Software Asset Management

## *Define Compliance*

### SIMPLE LICENSE

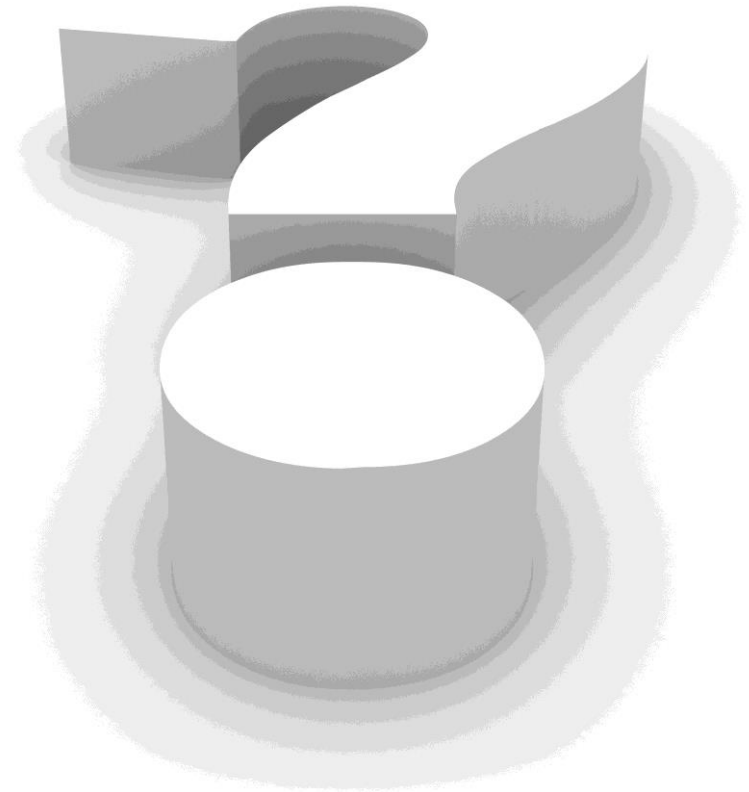
- Buy One, Install One

### COMPLEX LICENSE

- Processor Value Unit (PVU)
- Client Access License (CAL)
- Core Based

### LICENSE VARIANTS

- Multi Use License
- Multi Version License
- Downgrade Rights
- Downgrade Path





# Software Asset Management

## *The Master Catalog*



### The Master Catalog is the Core

- Updated Monthly
- 180 Manufacturers
- 3,400 Product Families
- 58,000 Products
- 419,000 Mfr SKU's
- Tens of thousands of signatures
- And Growing



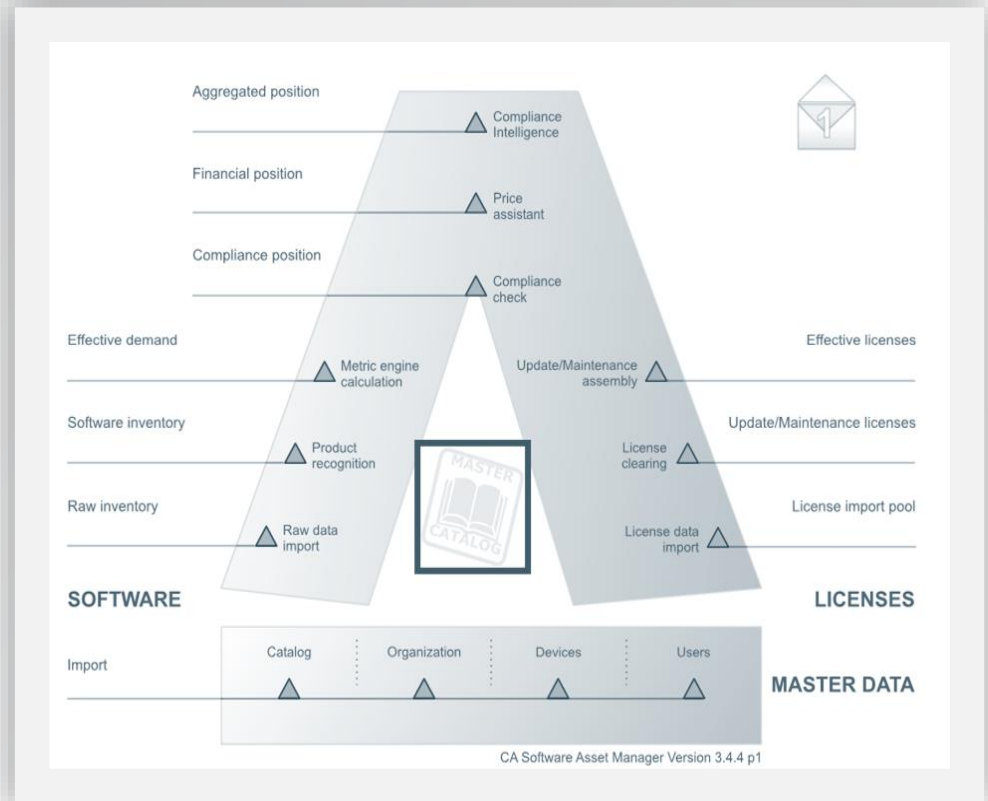
### Licenses

- Manufacturer SKU Recognition
- Supplements License Data for compliance calculations



### Software

- Product Recognition Rules
- Demand Calculations



Core to the CA Software Asset Management capability is the Master Catalog, which augments Purchase and Discovery data.

# Software Asset Management

## *The Master Catalog*



### Organizational Structure

- Divisions
- Companies
- Cost Centers



### Devices

- Standalone
- Related



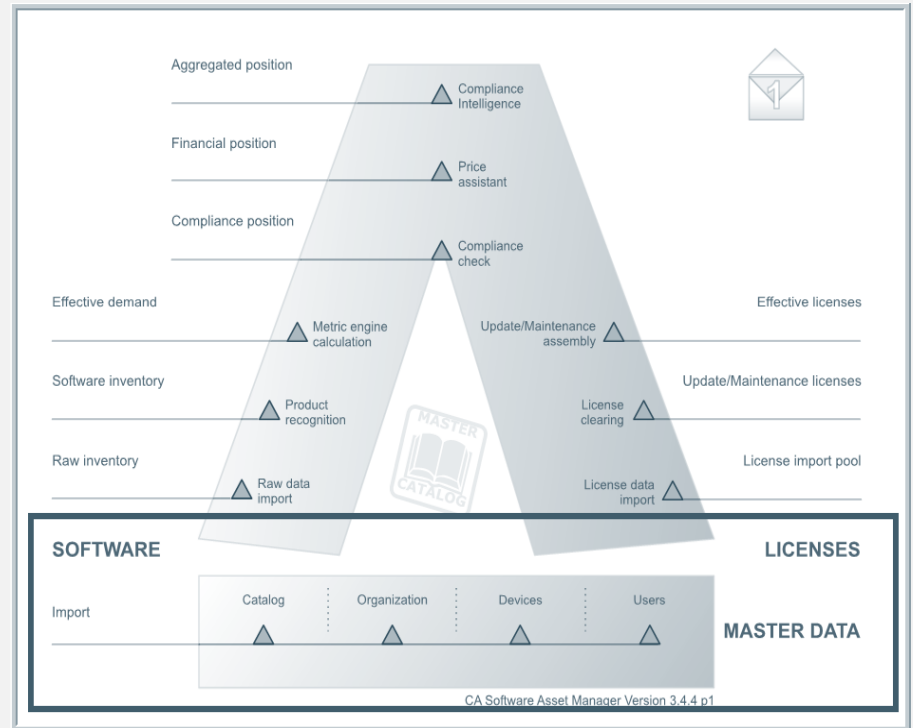
### Users

- Permissions



### Reference Data

- Locations
- User relationships
- CI's



Basic data elements such as devices, people and organization structure need to be loaded to ensure successful software management.

# Software Asset Management

## *Licenses*



### Leverages the Master Catalog



### License Clearing

- Matching manufacturer part number and Article description (license metrics, usage)



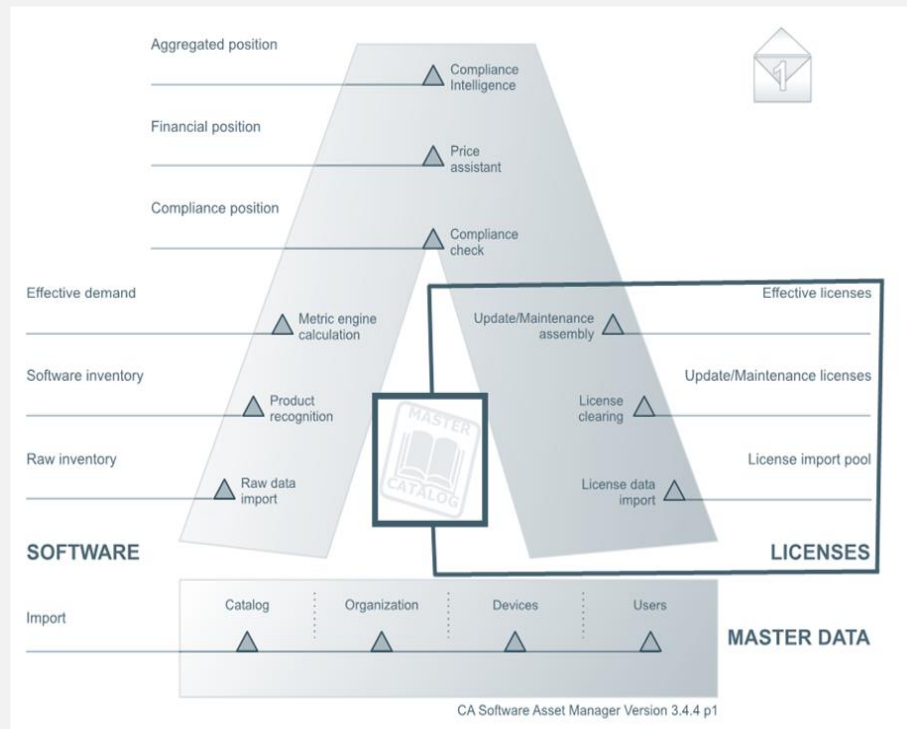
### Effective License

- Accounts for Upgrades and Maintenance details



### Extensions – “Extended Catalog”

- Customer specific software titles
- Accommodates Customer specific contracts with Manufacturers



The Master Catalog contains Manufacturer SKUs which are used to further define purchase details.

# Software Asset Management

## Discovery



Leverages the Master Catalog



Consumes raw discovery data from one or more sources

- Data Normalization not required



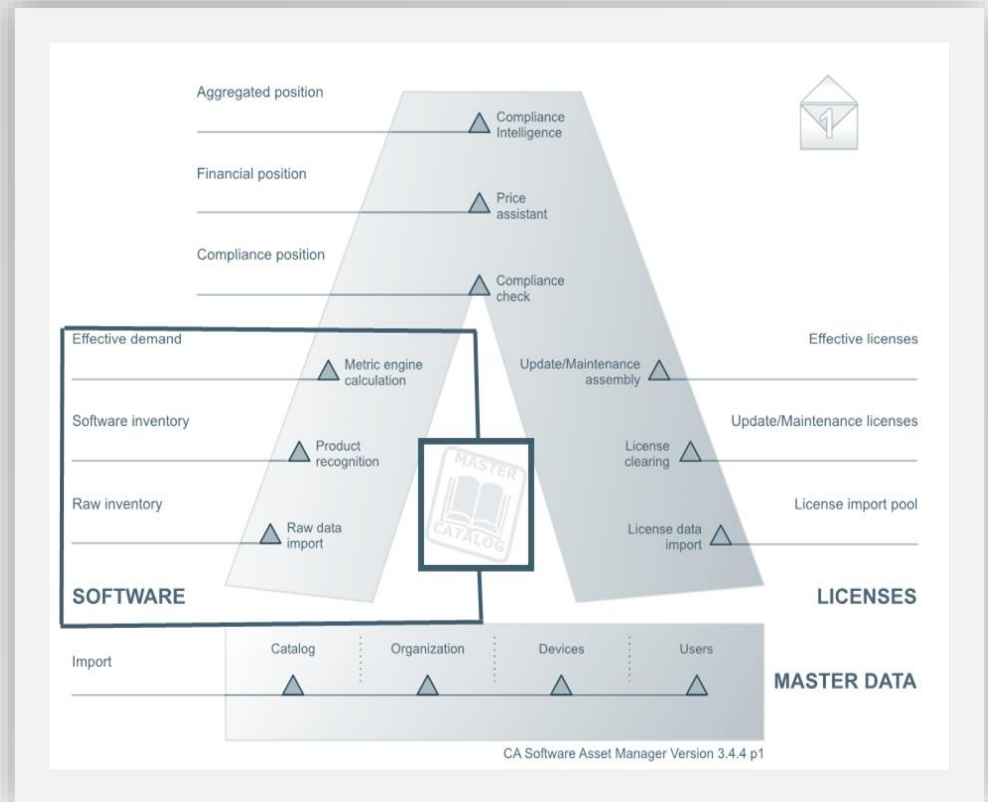
Software Inventory

- Recognition rules to determine Product/Version/Edition
- Asset-centric tools stop here!



Effective Demand

- Enhances inventory to define the usage metrics (manufacturer supplied)



The Master Catalog examines raw discovery data to identify products, version and additions. Additionally, the Master Catalog adds usage metrics.

# Software Asset Management

## Compliance View



### Interactive Compliance Views

- Effective Demand – Normalized names with usage metrics applied
- Effective License – Normalized names with entitlement details

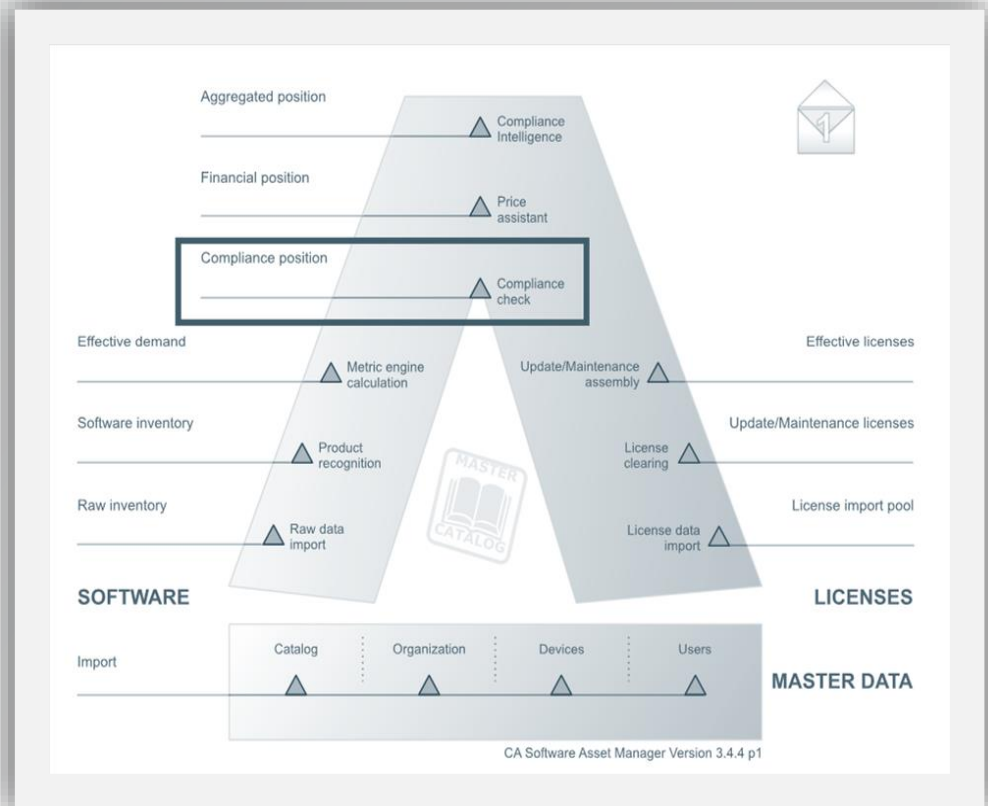


### Internal always have a compliance view even if data is missing

- Uses Default values to calculate
- Shows quality of compliance position



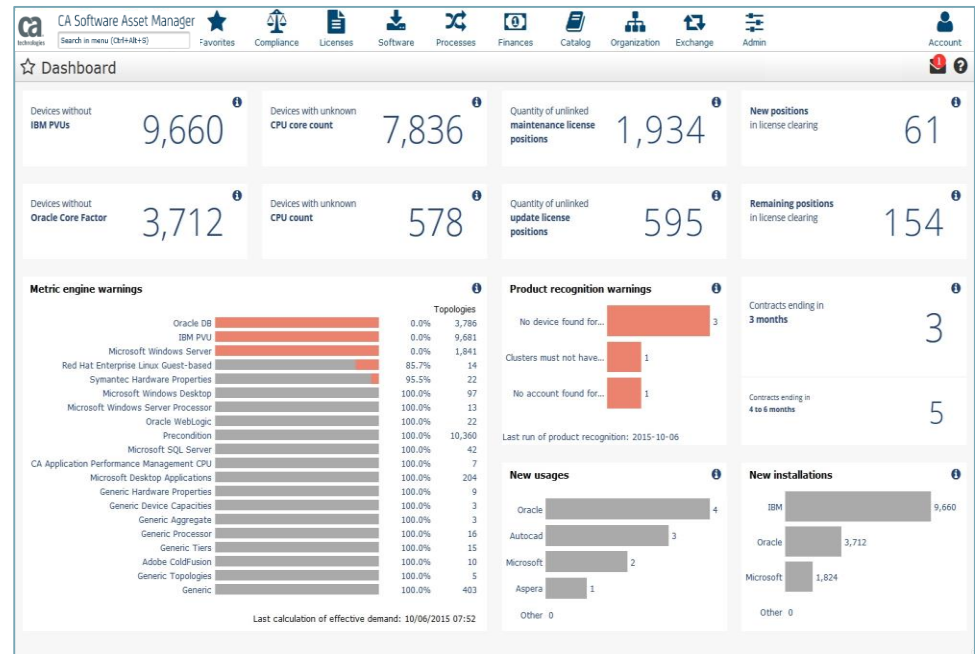
### Drill Down to see composition of results



Comparing licenses to usage, an apples-to-apples comparison

# Software Asset Management Dashboard

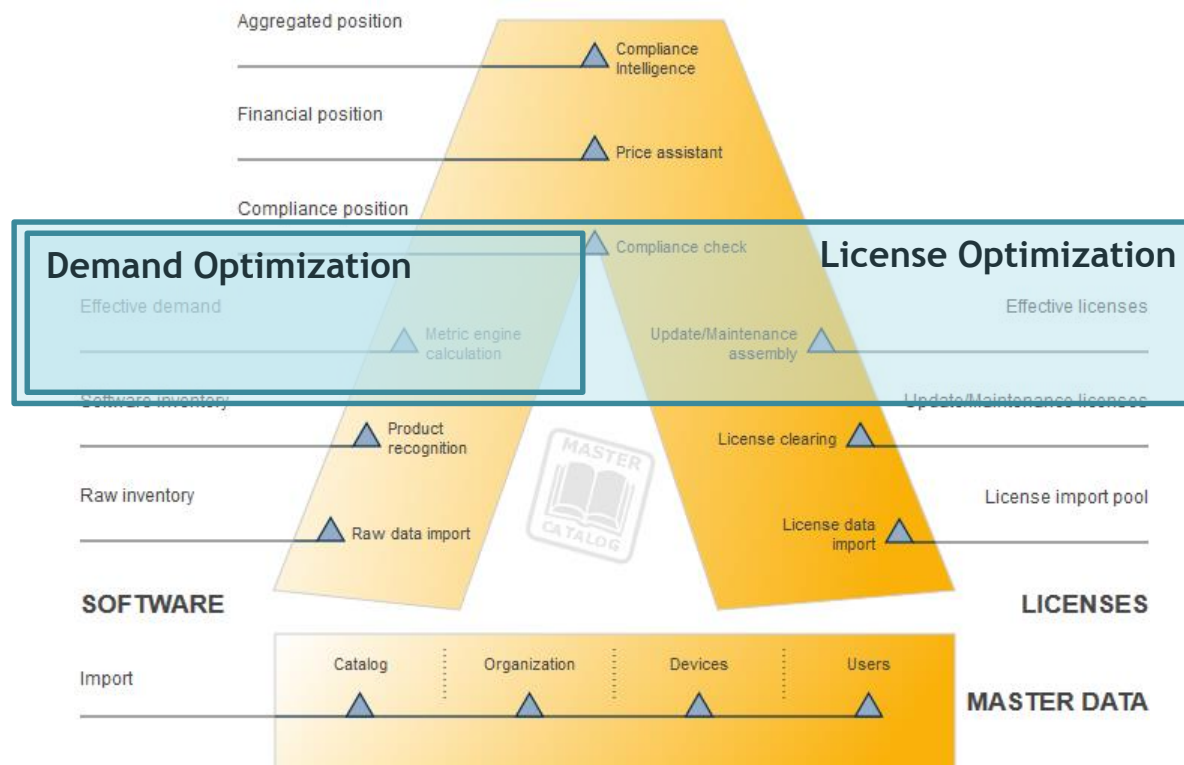
- Dashboard Start Page
  - Facilitates daily operations
  - Immediate visibility into relevant information & KPIs
  - Addresses important SAM questions, such as:
    - "How feasible is my compliance?"
    - "What do I need to focus on today?"



# Software Asset Management

## *Optimization and Simulation – Add On Module (OSM)*

### ■ Demand- vs. License Optimization

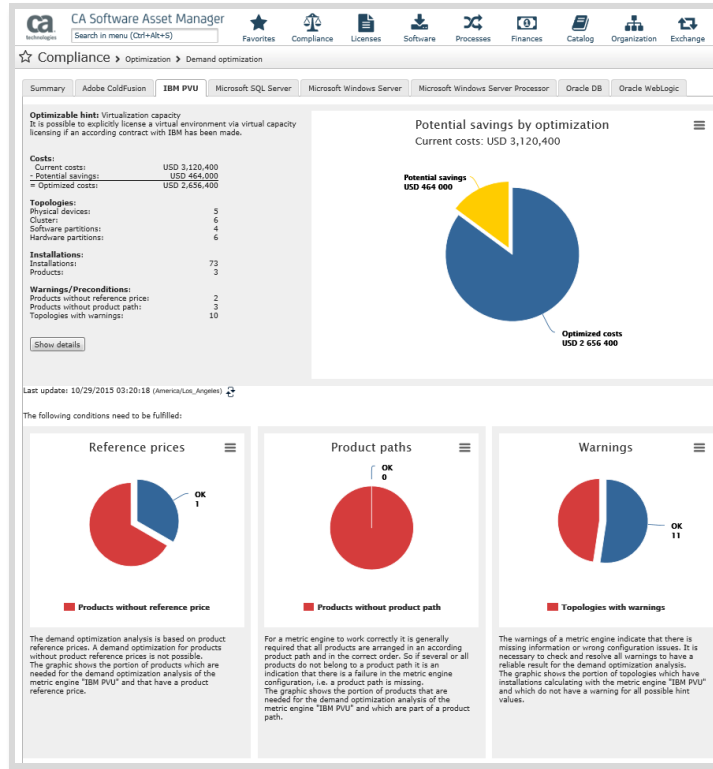


# Software Asset Management

## Optimization and Simulation – Add On Module (OSM)

### Features

- Simulate impact of different server, virtualization and cluster scenarios on license demand
- Recommend changes to the operational environment to reduce the license demand
- Compare alternative licensing options & evaluate the financial impact of making changes
- Optimize budget planning and preparation for true-ups and contract renewals
- Improve the compliance position in an audit, based on the available licenses owned by the company



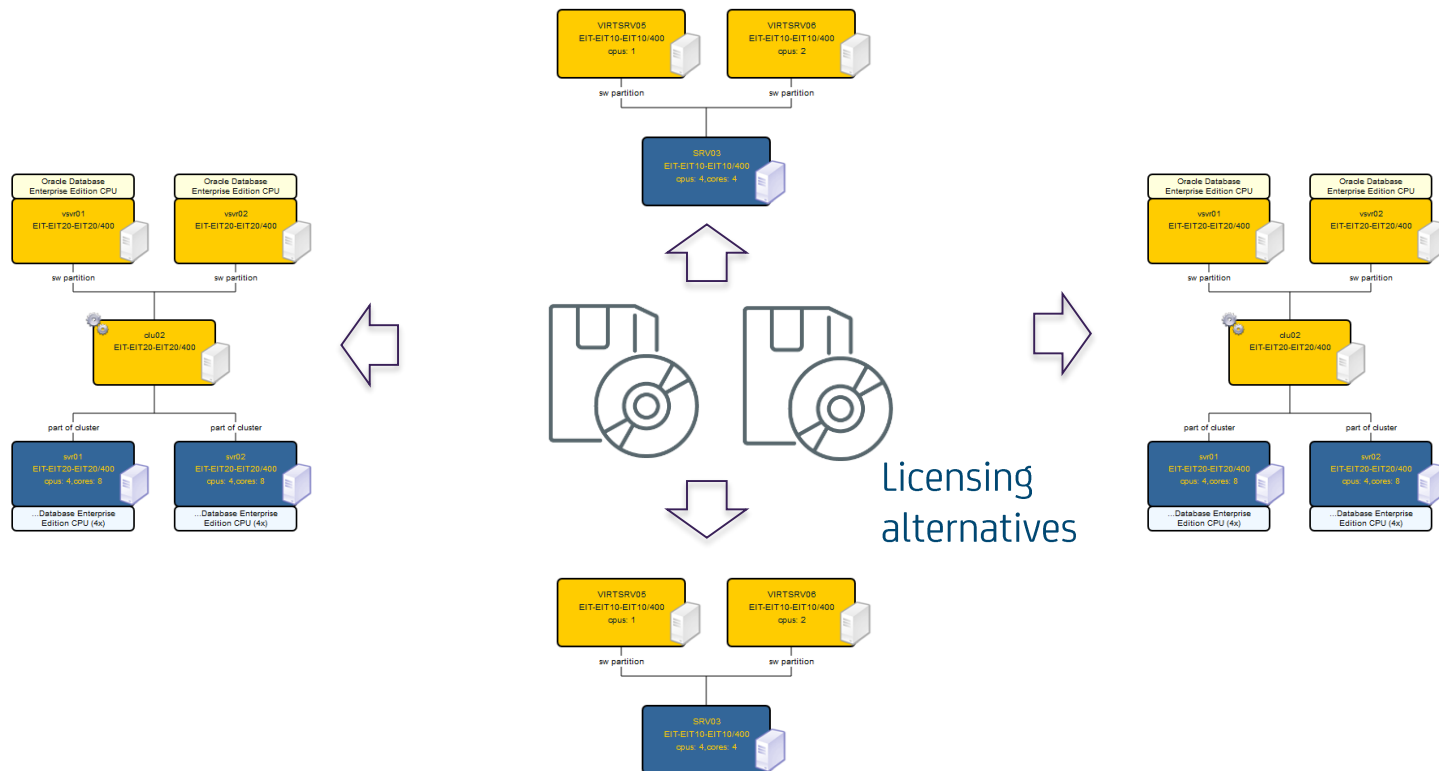
### Business Value

- Identify real cost savings opportunities
- Support more strategic procurement decisions
- More accurate forecasting and demand planning



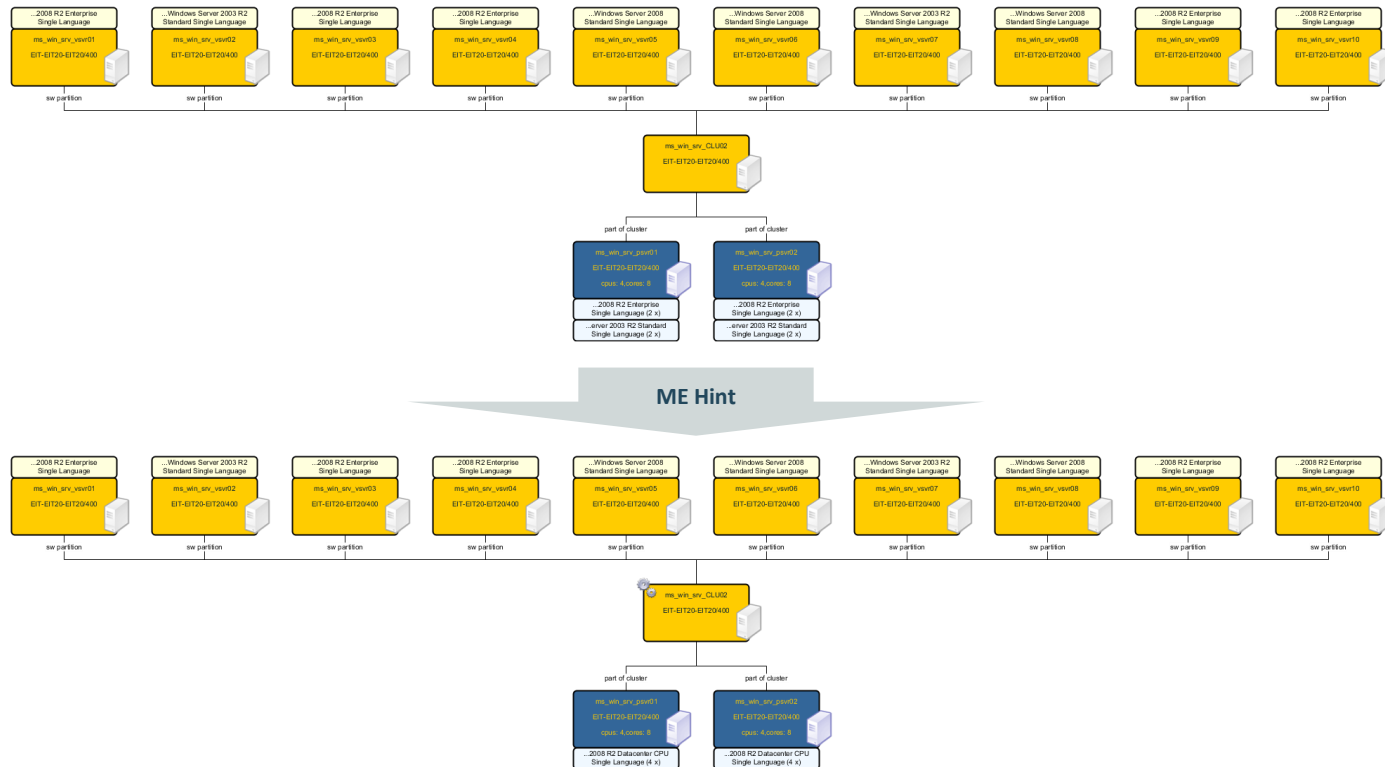
# Software Asset Management

## *Optimization and Simulation – Add On Module (OSM)*



# Software Asset Management

## *Optimization and Simulation – Add On Module (OSM)*



# Software Asset Management

## *Optimization and Simulation – Add On Module (OSM)*

### ■ Three Possibilities

Compliance > Optimization > Demand optimization

> Analysis parameters

> Legend

Page 1 of 1 (7 records)

Topology	Center device	Product path/Product ⓘ	Edition No hint (USD)	Edition Enterprise (USD)	Edition Datacenter (USD)	Edition (Optimized hint)	Number of warnings (Total)	Missing reference prices (Products) ⓘ	Potential savings (USD) ↓	Potential savings (%)		
⋮	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
***	Software partition	ms_win_srv_psr0011	Microsoft Windows Server	1,044.30	1,044.30	17,824.68		0	0	16,780.38	94.14	
***	Cluster	ms_win_srv_CLU02	Microsoft Windows Server	9,835.23	10,686.78	11,449.17	No hint		0	0	1,613.94	14.10
***	Cluster	ms_win_srv_clu11	Microsoft Windows Server	9,835.23	10,686.78	11,449.17	No hint		0	0	1,613.94	14.10
***	Software partition	ms_win_srv_psr002	Microsoft Windows Server	11,449.17	11,449.17	11,449.17		1	0	0.00	0.00	
***	Cluster	clurestr_clu_3	Microsoft Windows Server	0.00	3,722.76	17,824.68	No hint		0	1	0.00	0.00
***	Cluster	clurestr_clu_4	Microsoft Windows Server	0.00	1,861.38	13,368.51	No hint		0	1	0.00	0.00
***	Physical device	ms_win_srv_VHD1	Microsoft Windows Server	617.49	1,781.13	2,862.29	No hint		2	0	0.00	0.00

# Software Asset Management

## *Manage Financial Risks*

### Price Assistant

#### Sources for price information

License  
Inventory

License  
History

Article  
Catalog

Downgrade  
Paths

A  
S  
S  
I  
S  
T  
A  
N  
T



- Average and Quality
- Selection of the best sources
- Deviation from the current price estimation

Suggest Price  
Estimate

U  
S  
E  
R



- Plausibility
- Evaluate Anomalies
- Price/Version Strategy
- ...

Accept  
Suggestion

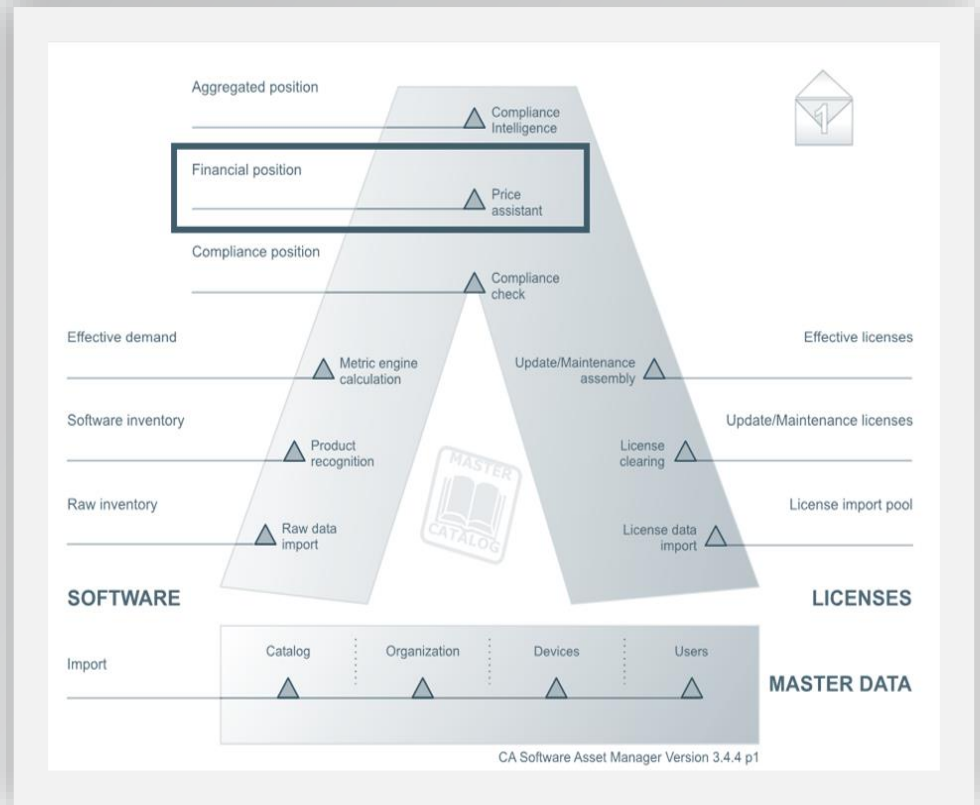
Ignore  
Suggestion

# Software Asset Management

## *Financial – Add On Module*



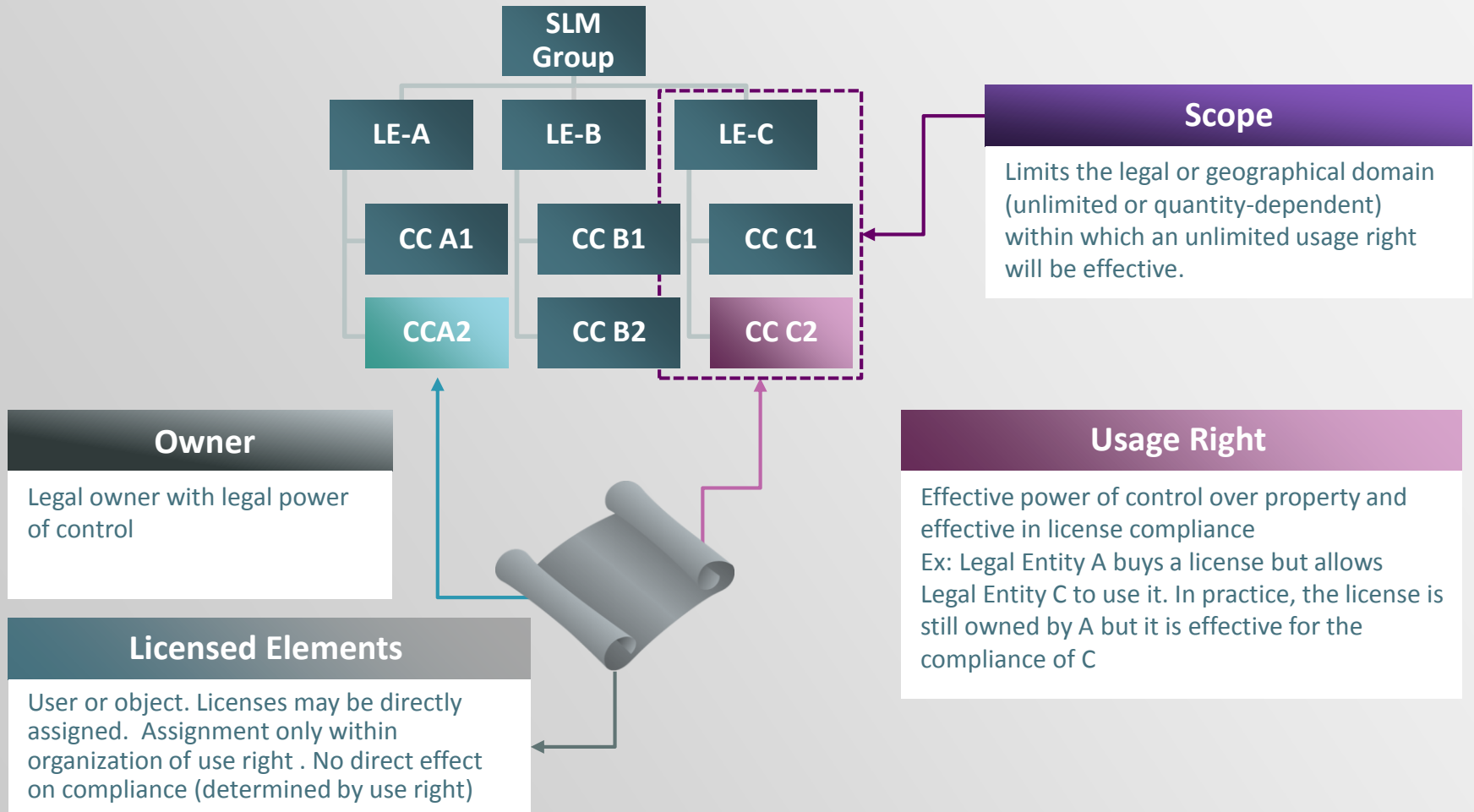
- Contract Payments
- Licensing Costs
- Maintenance Costs
- Cost Charging
- Finance and Budgeting



## Adding financial details to the compliance view aids in defining focus areas

# Software Asset Management

## *Ownership, Usage Right, Scope*



# Software Asset Management

## *Aggregate Position*



Management and Auditors view  
into compliance position

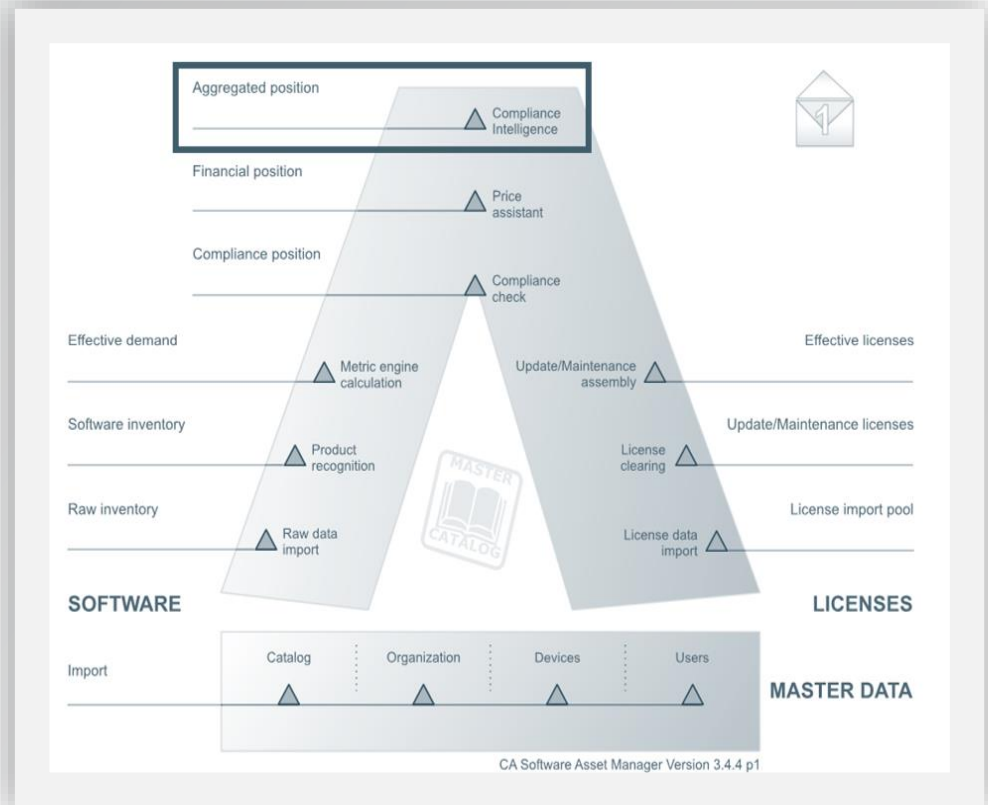


Graphical Representation



Drill into results

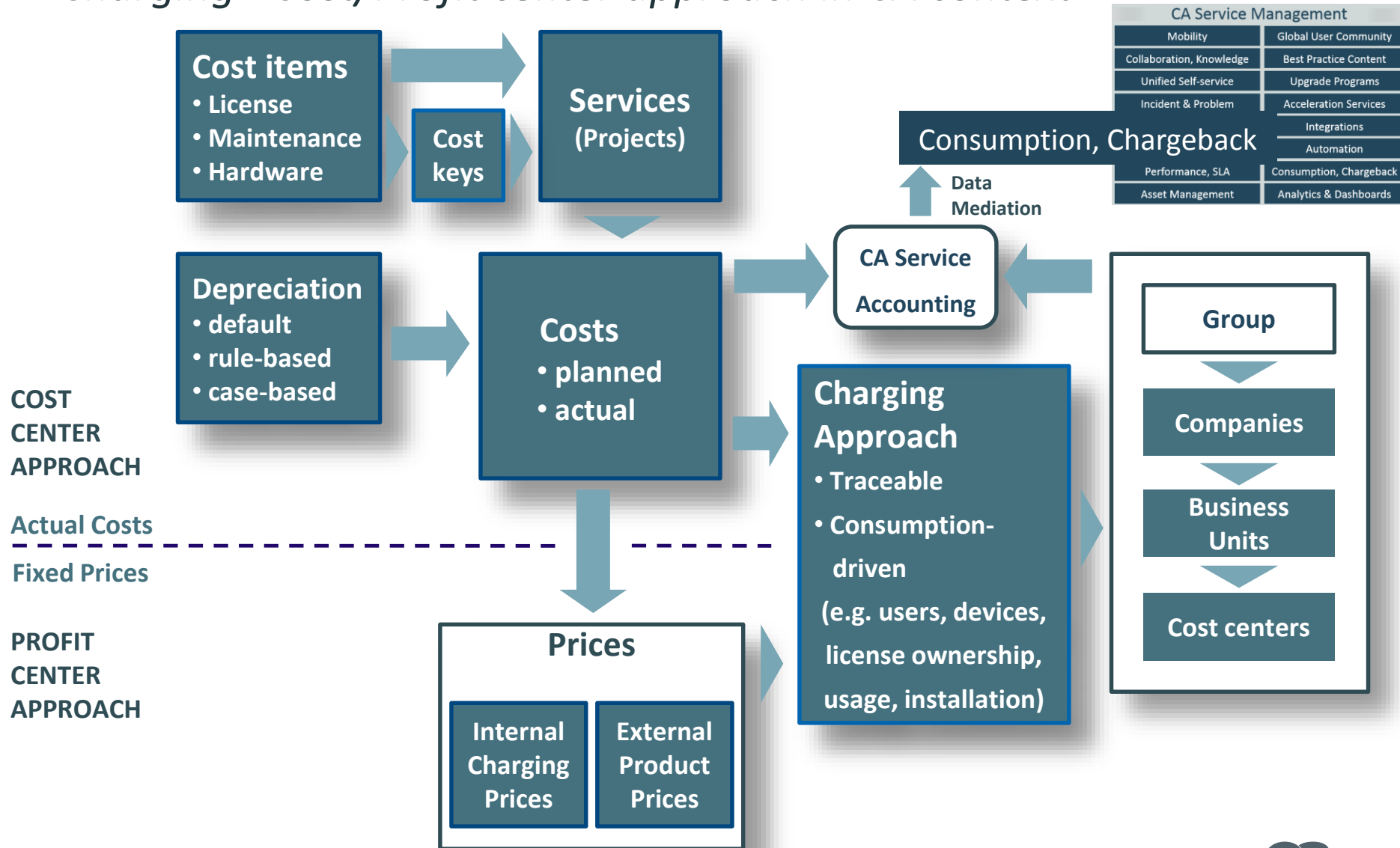
- Manufacturer
- Product
- Cost Center
- Division



Management dashboard view provides various perspectives on the software landscape

# Hardware & Software Asset Management

## *Charging - Cost/Profit center approach in CA context*





# CA Service Accounting Invoicing Functionality

**CA Service Catalog**

Reno, Frank [Log Out](#) | [Help](#)  
Business Unit: **Forward Financial**    Role: **Super Business Unit Administrator**

[Home](#)
[Catalog](#)
[Accounting](#)
[Administration](#)

[Account Management](#)
[Invoices](#)
[Budget and Planning](#)
[Adjustments](#)
[Configuration](#)

Account: **North America Financial:jdavis**
[Invoice On-Demand](#)
[Summary](#)
[Details](#)

Home > Accounting > Account Management > North America Financial > North America Financial:jdavis

[Subscriptions](#)
[Invoices](#)
[Profile](#)
[Accounting Profile](#)

**Invoice History**  
Select and: Rollback

Invoice Number	Period	Invoice Date	Subscription Amount	Violations	Total Amount
<input type="checkbox"/> North America Financial:jdavis:10007 <a href="#">Summary</a>   <a href="#">Details</a>	From: 6/1/2013 To: 7/1/2013	10/2/2013	Charges: \$599.00 Credits: \$0.00	0	\$599.00
<input type="checkbox"/> North America Financial:jdavis:10027 <a href="#">Summary</a>   <a href="#">Details</a>	From: 2/1/2014 To: 12/1/2014	11/10/2014	Charges: \$599.00 Credits: \$0.00	0	\$599.00
<input type="checkbox"/> North America Financial:jdavis:10029 <a href="#">Summary</a>   <a href="#">Details</a>	From: 1/1/2015 To: 2/1/2015	12/5/2014	Charges: \$599.00 Credits: \$0.00	0	\$599.00

[http://itasm:8787/?mode=icguinode.billingaccountstatementdetails&ObjectID=10029&NspPath=8&Args=1 - Windows Internet](#)

North America Financial

Account Number: **North America Financial:jdavis**  
Invoice Period: **01/01/2015 - 02/01/2015**  
Invoice Number: **North America Financial:jdavis:10029**  
Your PO Number:

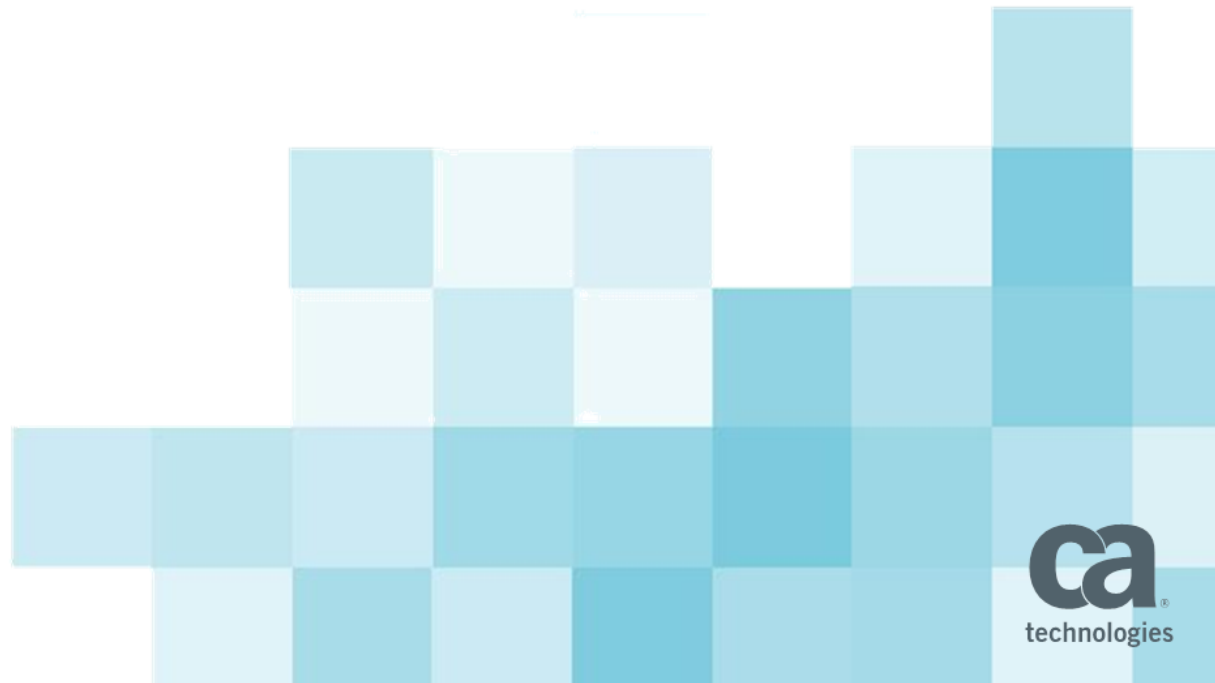
**Bill To:**  
North America Financial

Invoice Date	Invoice Number:	Due Date	Amount
12/05/2014	North America Financial:jdavis:10029	12/15/2014	\$599.00

**Item Summary**  
Charges

Date	Description	Amount
	Communication - Tablet Devices - iPad Tablet	
	- Tablets	
12/05/2014	iPad - 32GB	
12/05/2014		
12/05/2014	32GB Flash Drive Height:9.56 inches (242.8 mm) Width:7.47 inches (189.7 mm) Depth:0.5 inch (13.4 mm) Weight:1.5 pounds (0.68 kg) Wi-Fi model	
	UMTS/HSDPA (850, 1900, 2100 MHz) GSM/EDGE (850, 900, 1800, 1900 MHz) Data only2 Wi-Fi (802.11a/b/g/n)	

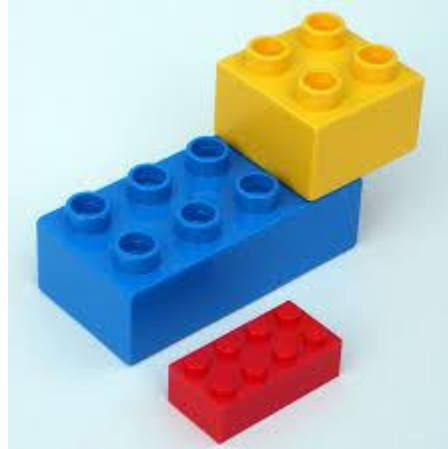
# IT Asset Management in a Service Management Context



# The foundation has to be a good one...



Asset Management  
Processes



Request, Incident & Problem  
Management Processes



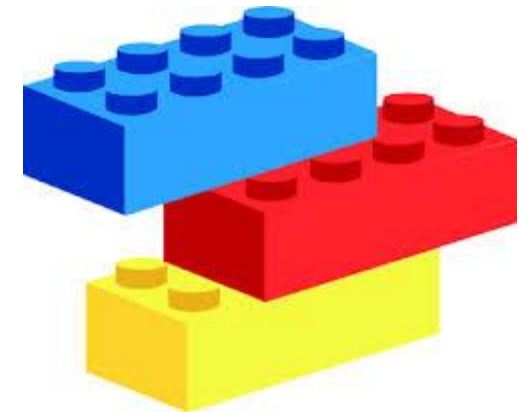
CMDB -> CMS -> SKMS



Capacity Management  
Processes



Service Catalogue  
Management Processes



Request, Change & Release  
Management Processes

# The foundation has to be a good one...



Asset Management  
Processes



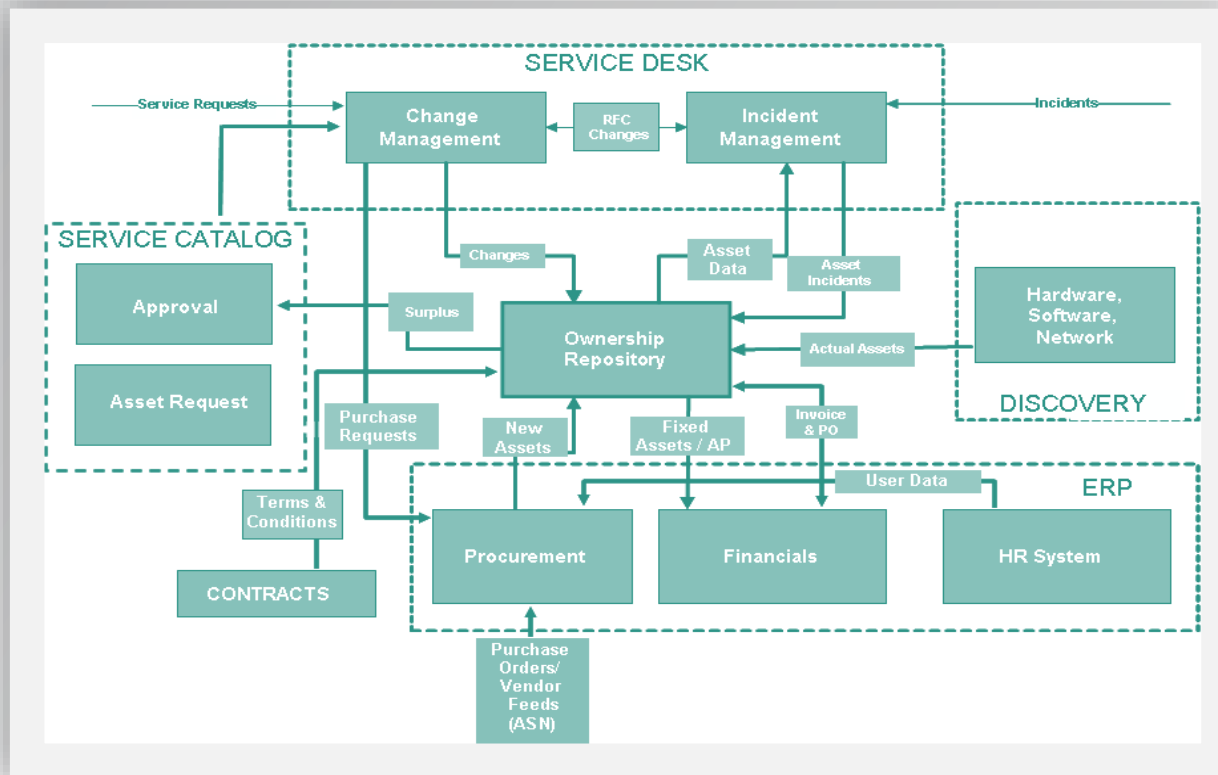
Service  
Management (ITIL®)  
Processes

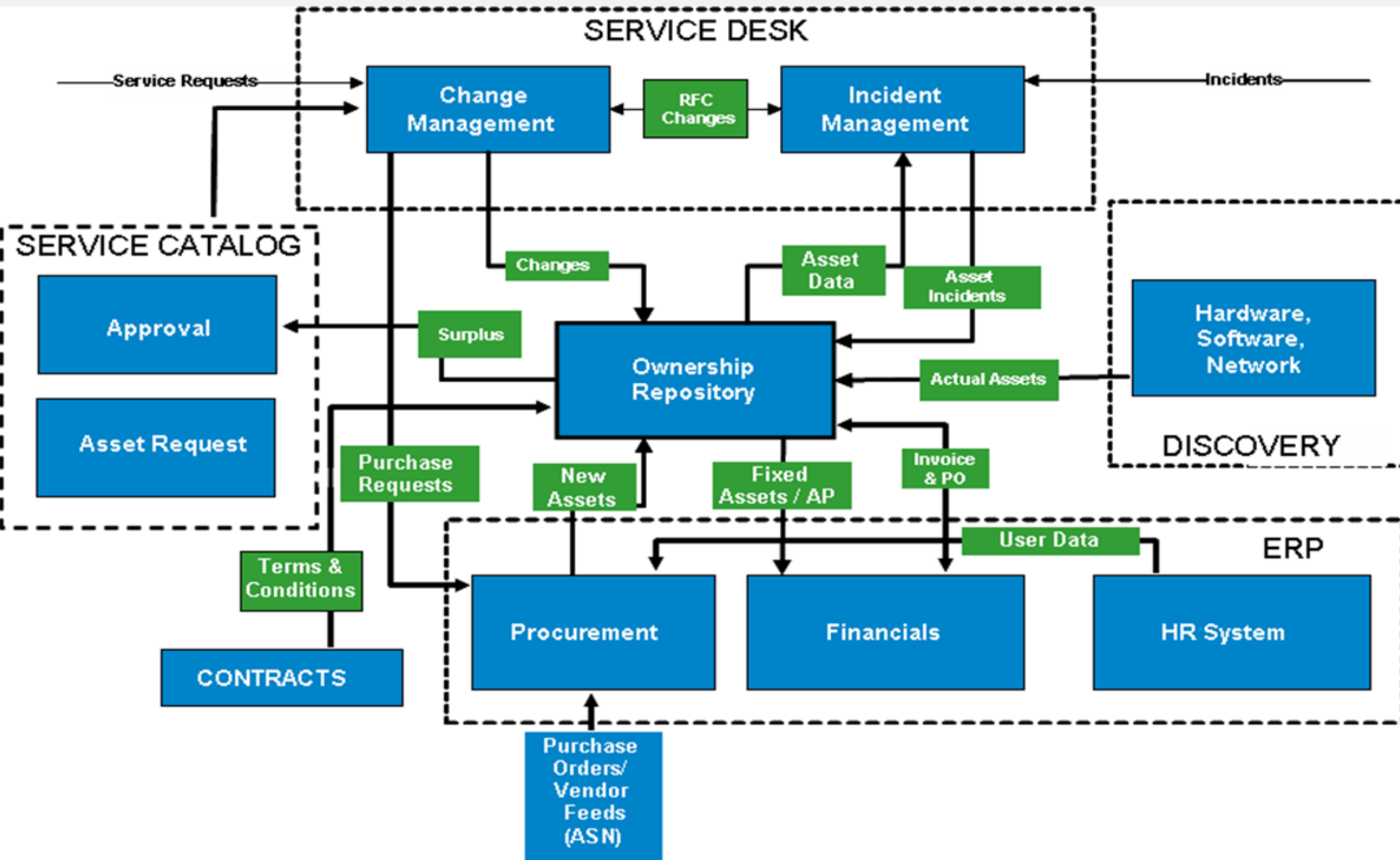


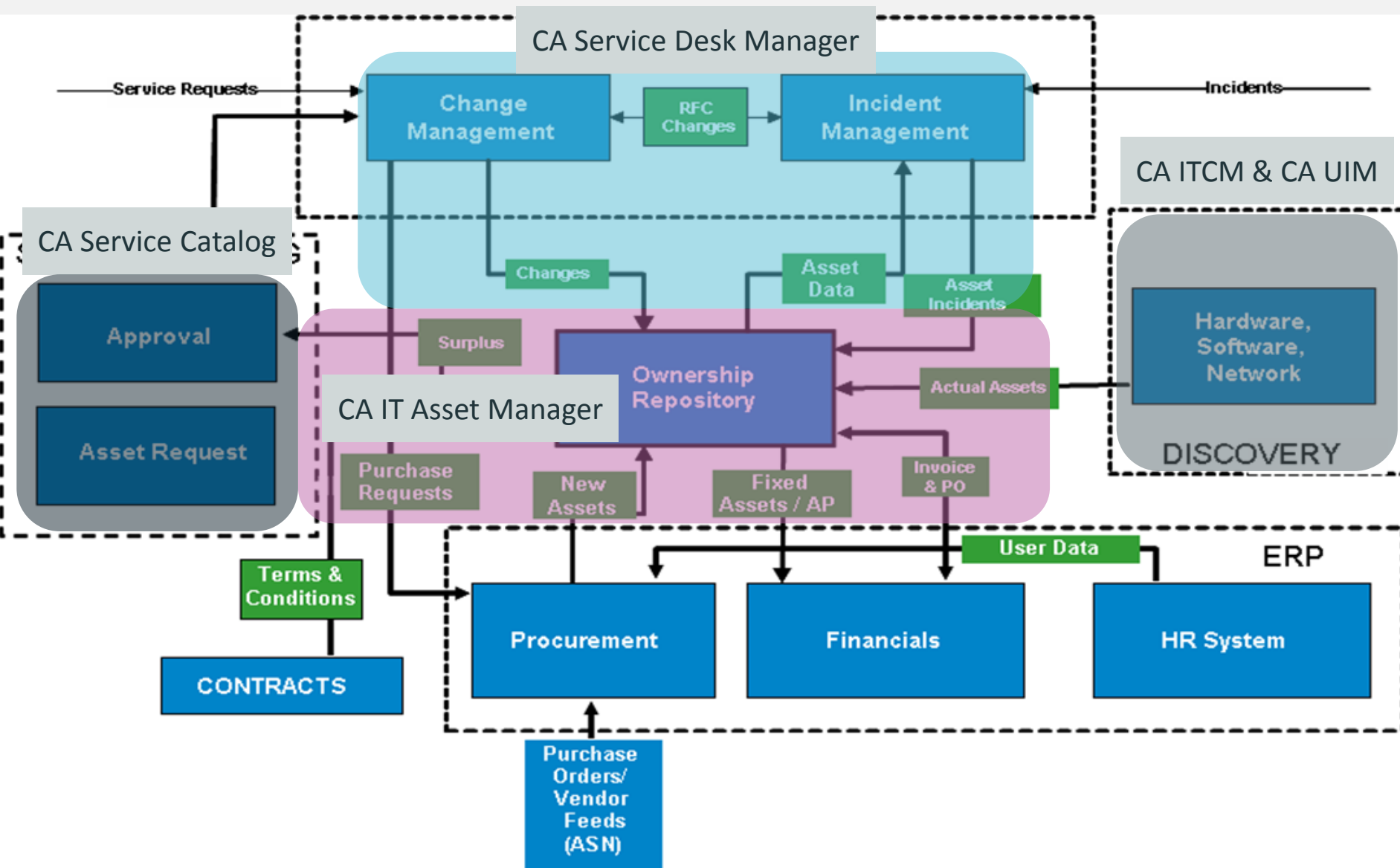
Business Processes

# What is Asset Management?

*IT Asset Management (ITAM) is the management and reconciliation of the physical, financial and contractual life-cycle attributes of IT assets (hardware and software) to enable the delivery of cost-efficient, timely business knowledge to better manage and control the business and operational aspects of IT.*

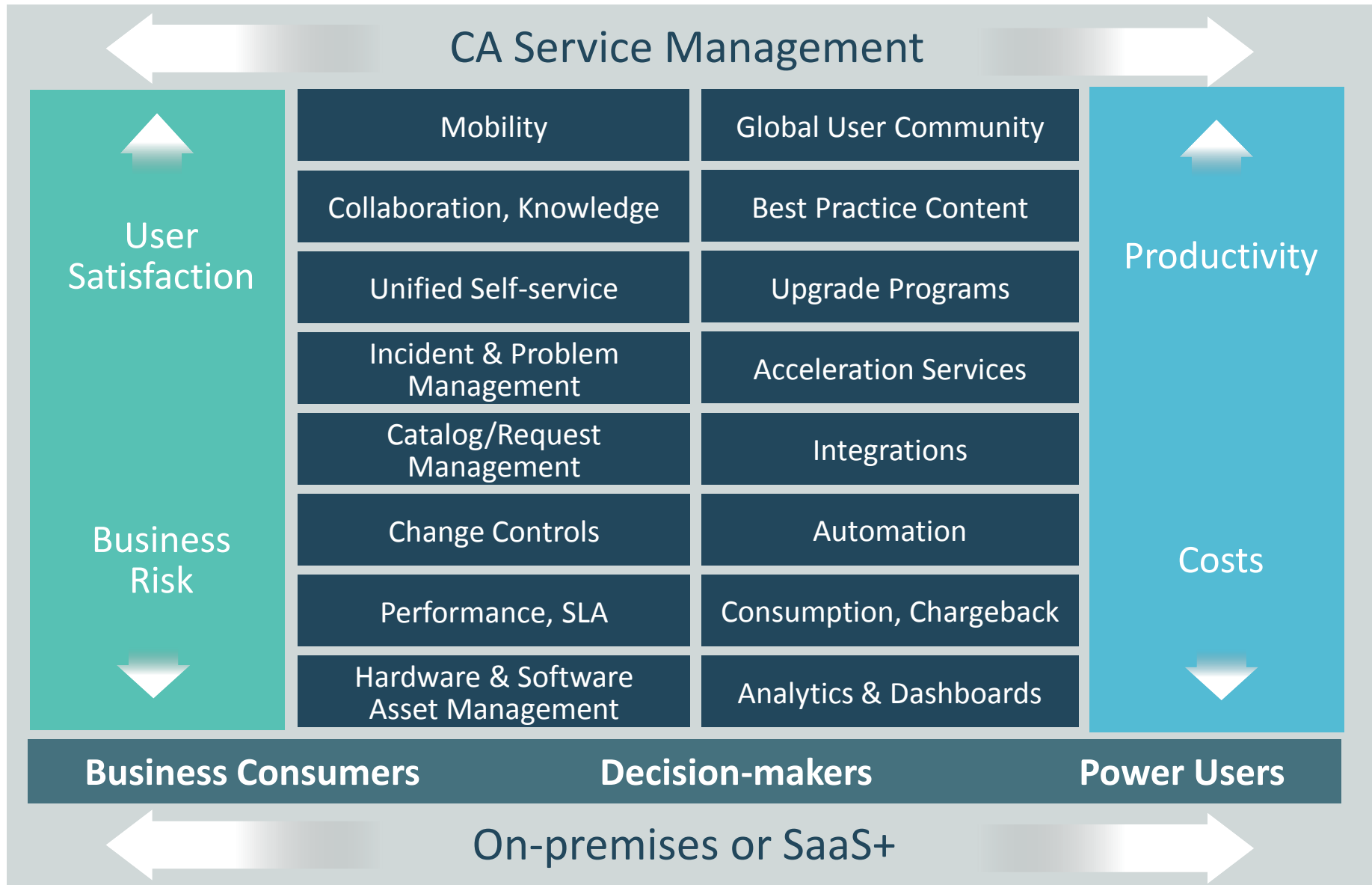






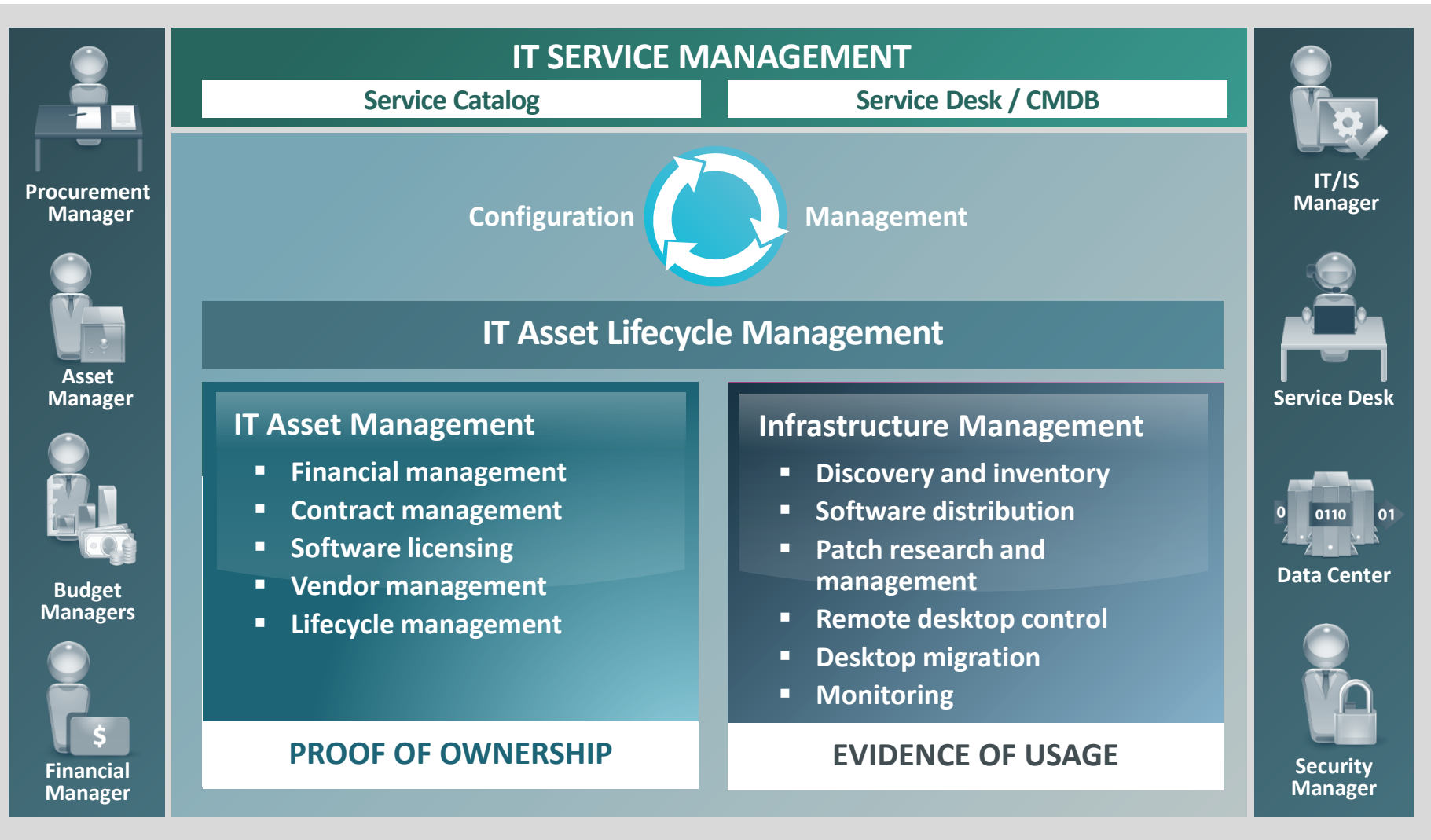
# The CA Service Management “Solution”

*Powerful. Proven.*

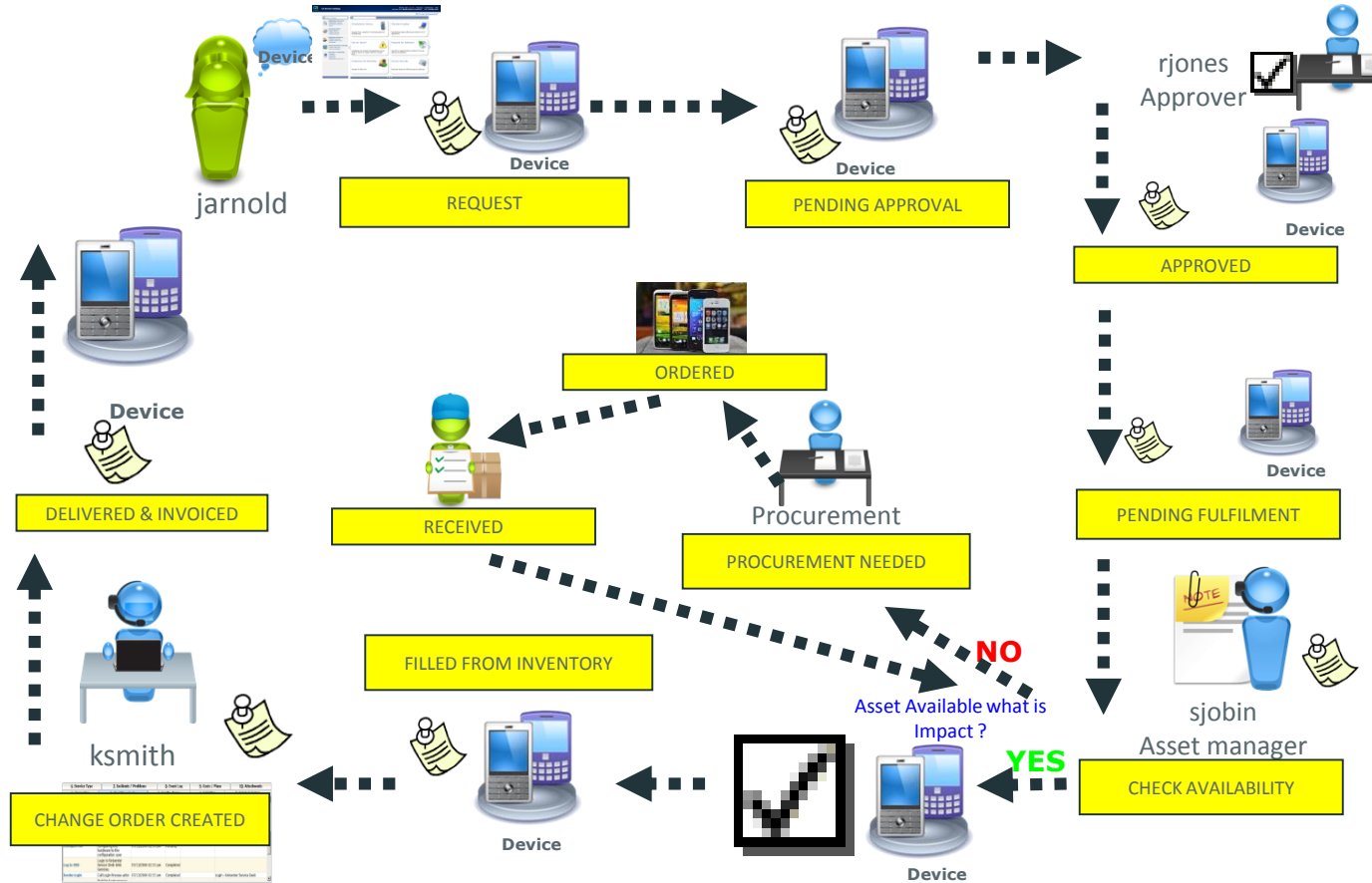




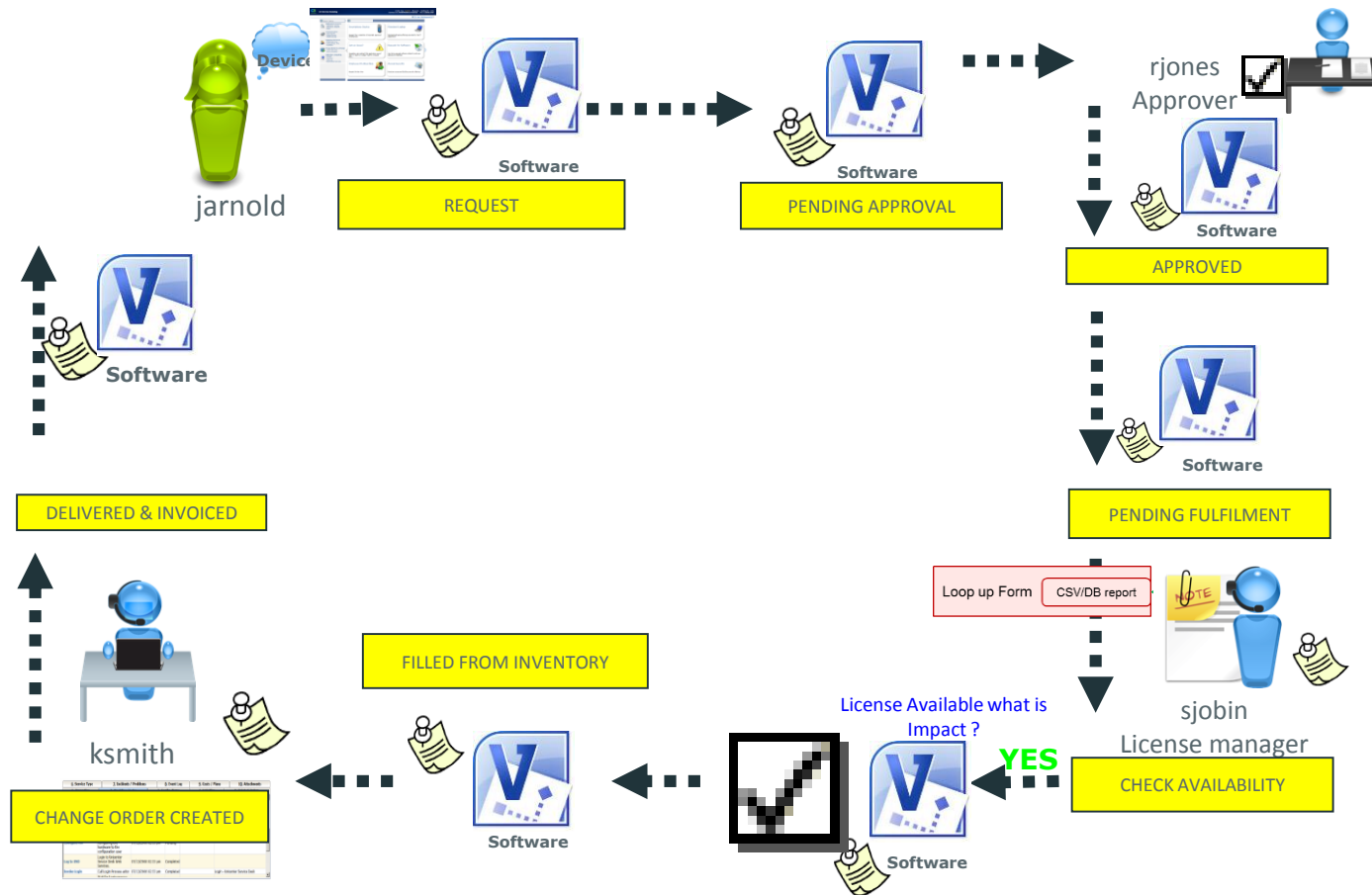
# Key Integrations



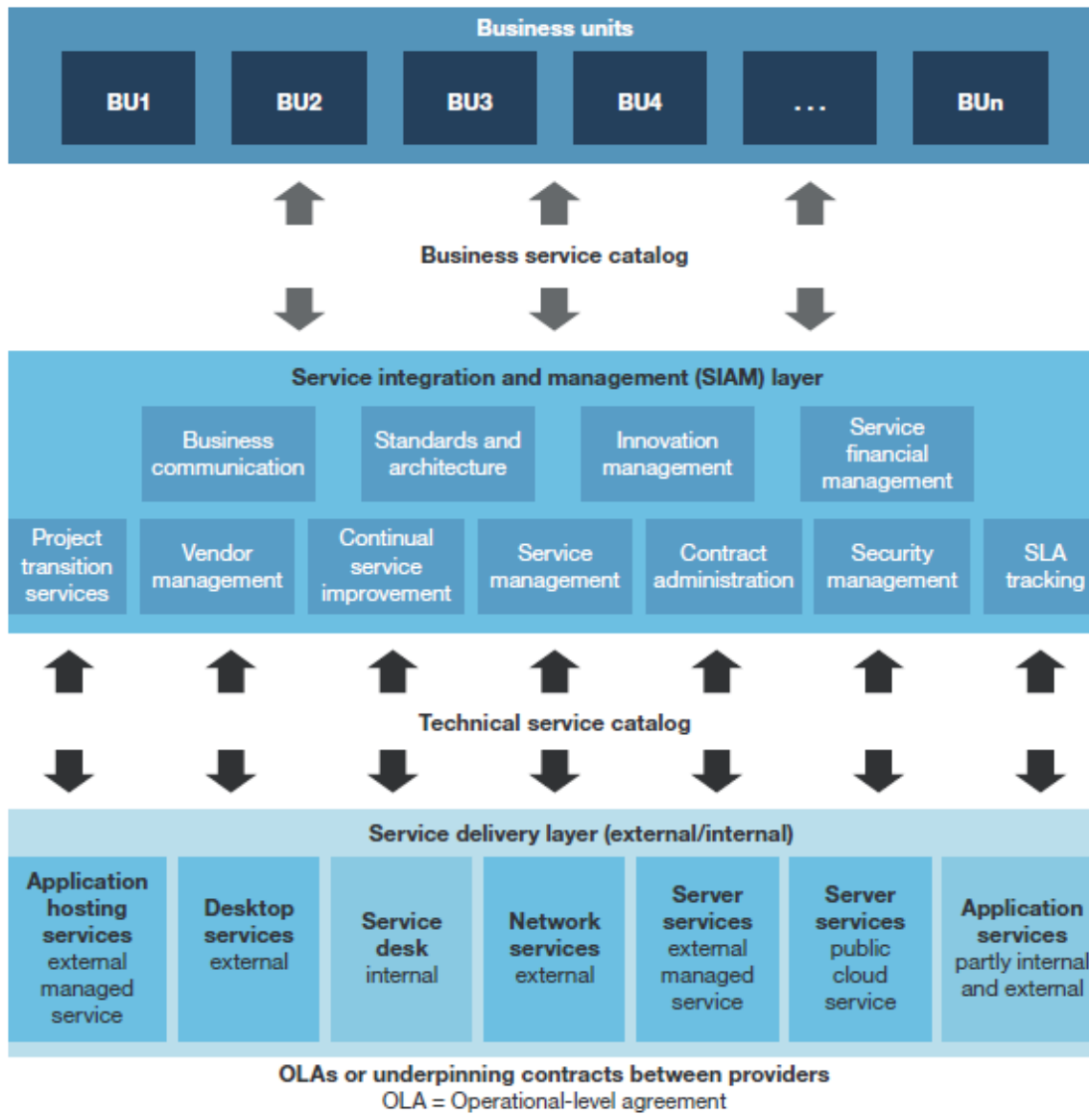
# Service Catalog driven hardware request process



# Service Catalog driven license/software request process



## ... and the future ...?

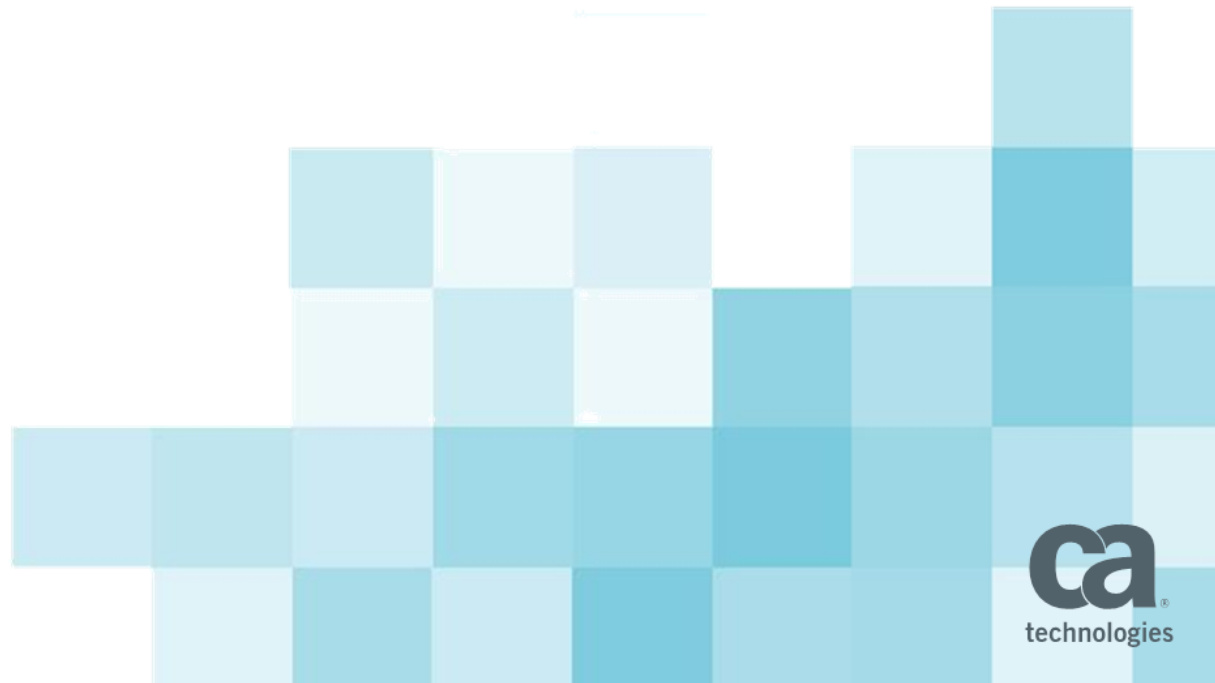


*The aim of SIAM is to have a **single point of control and visibility** into the management and delivery of all services provided by your ecosystem of suppliers.*

### Sourcing models:

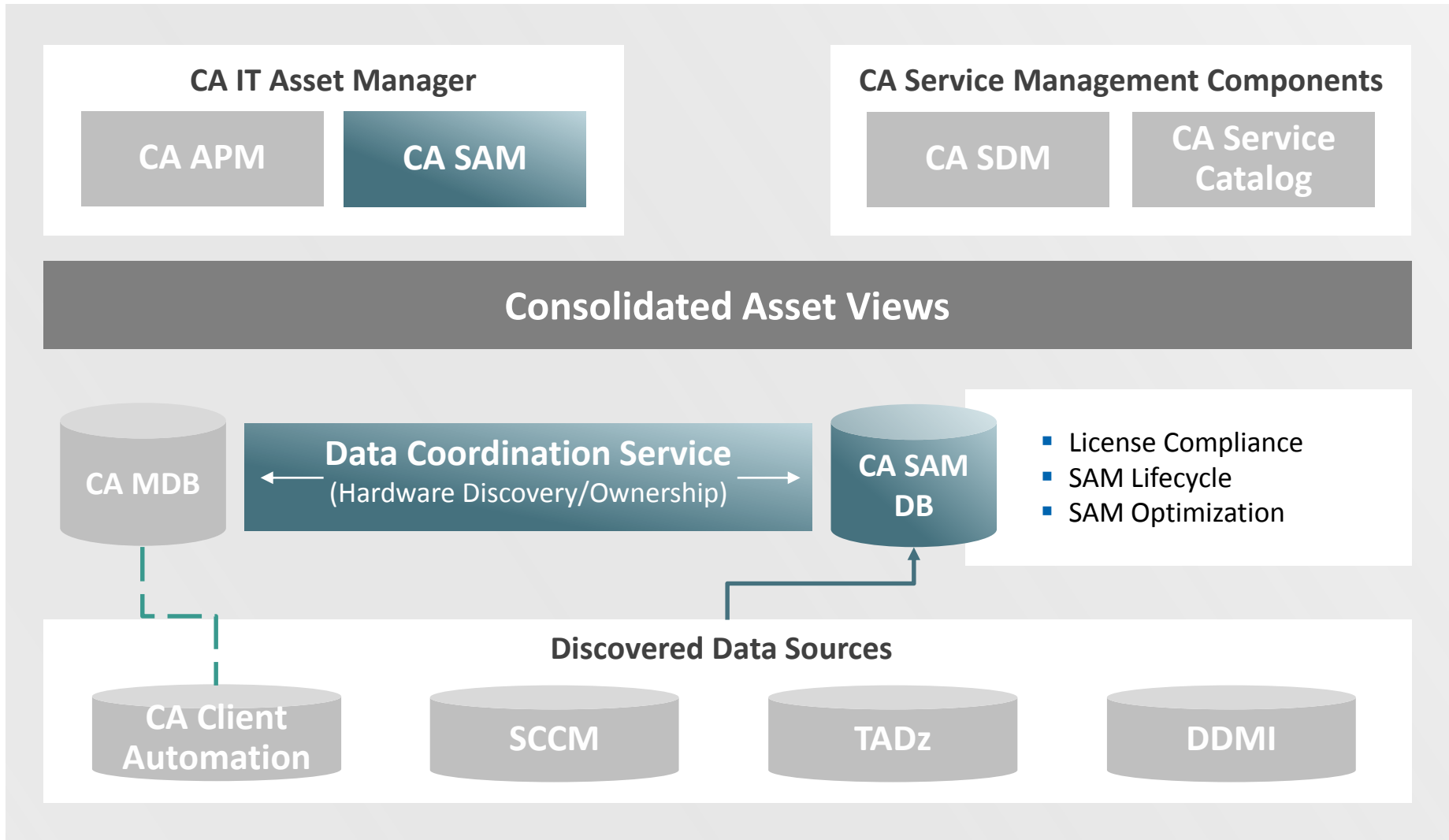
1. In house
2. Staff augmentation
3. Traditional outsourcing
4. Managed services
5. Cloud services

# CA Service Management *Asset Management Architecture*



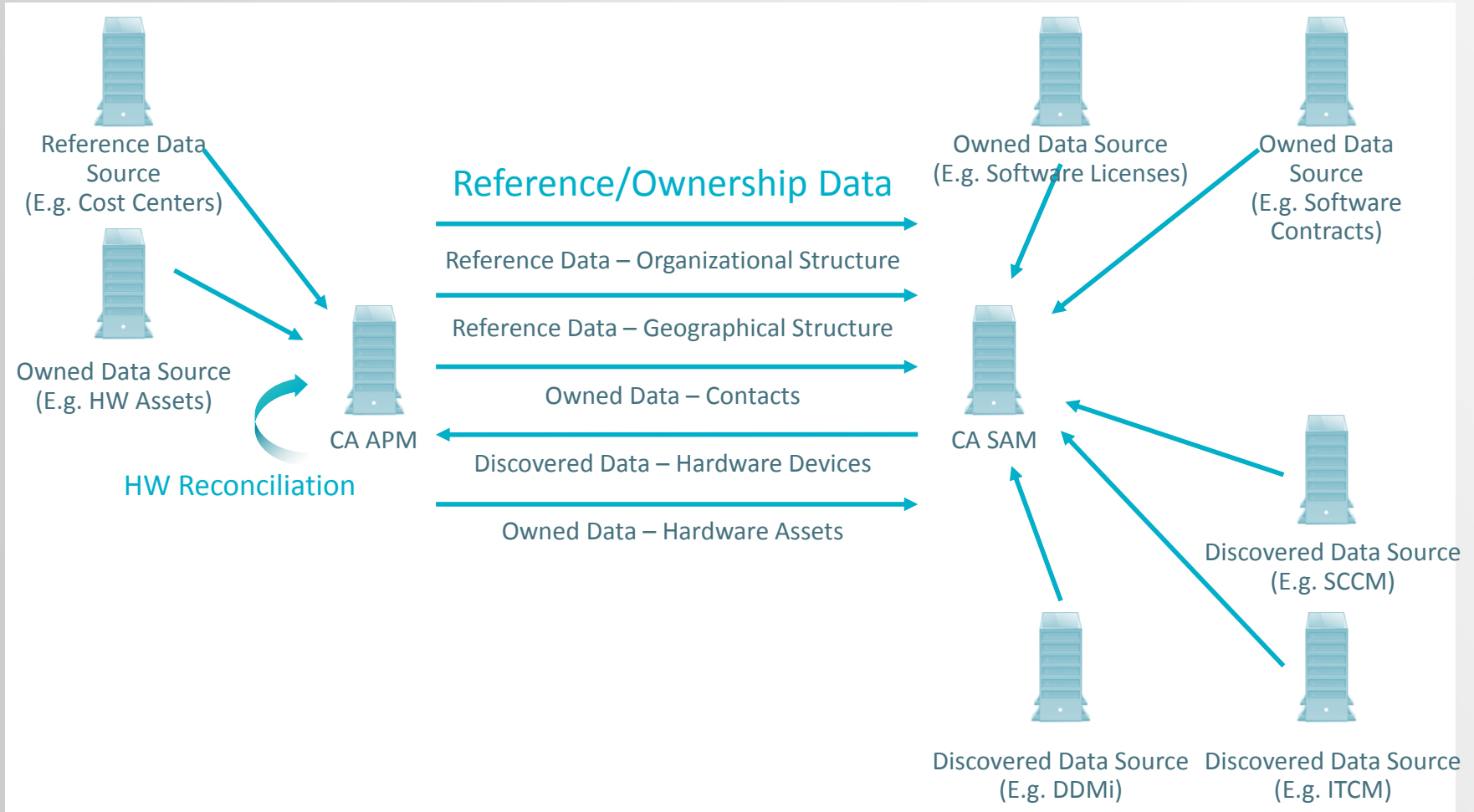
# Software Asset Management

## Architecture Optimizes Performance and Scalability

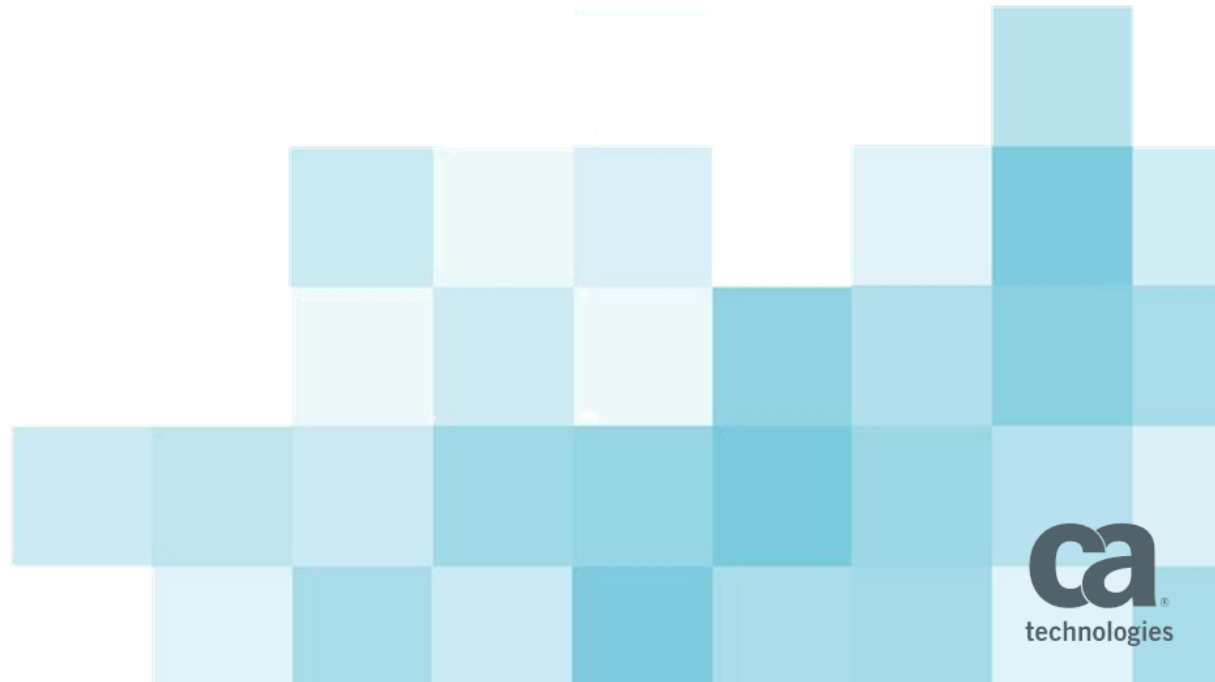


# Software Asset Management

## Architecture Optimizes Performance and Scalability



But it's More Than Just  
Technology...





# Implementation Services



## Get Started Foundation Services

Success starts with a strong foundation. Reference architecture provides a tested, preconfigured core solution that is quick to deploy and easily extended.

- Quickly meet highest priority requirements
- Simplify maintenance, training, solution adoption and support
- Accelerate time-to-value

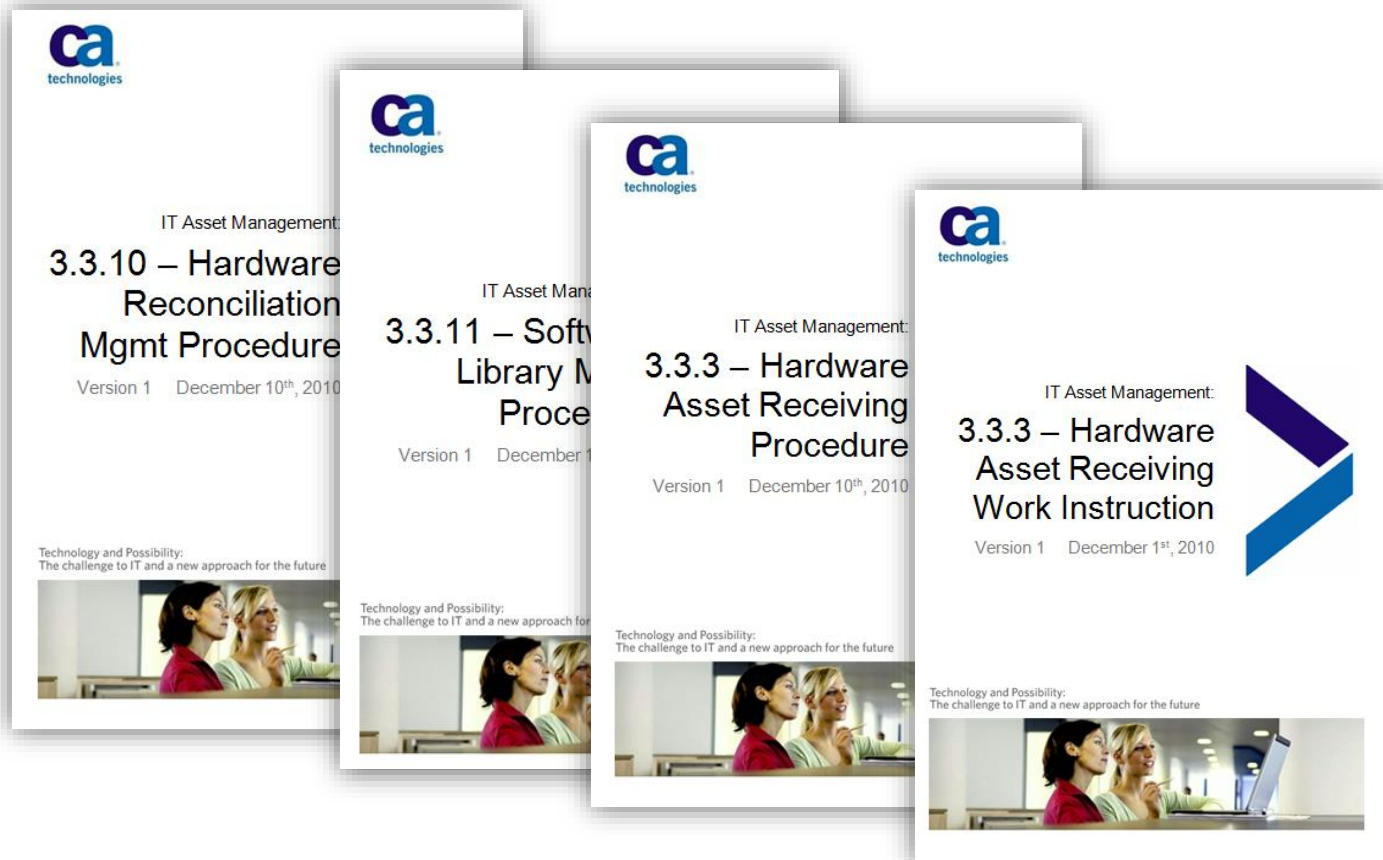


## Extend Value Acceleration Services

Extend the value of your CA Technologies solution with additional capabilities.

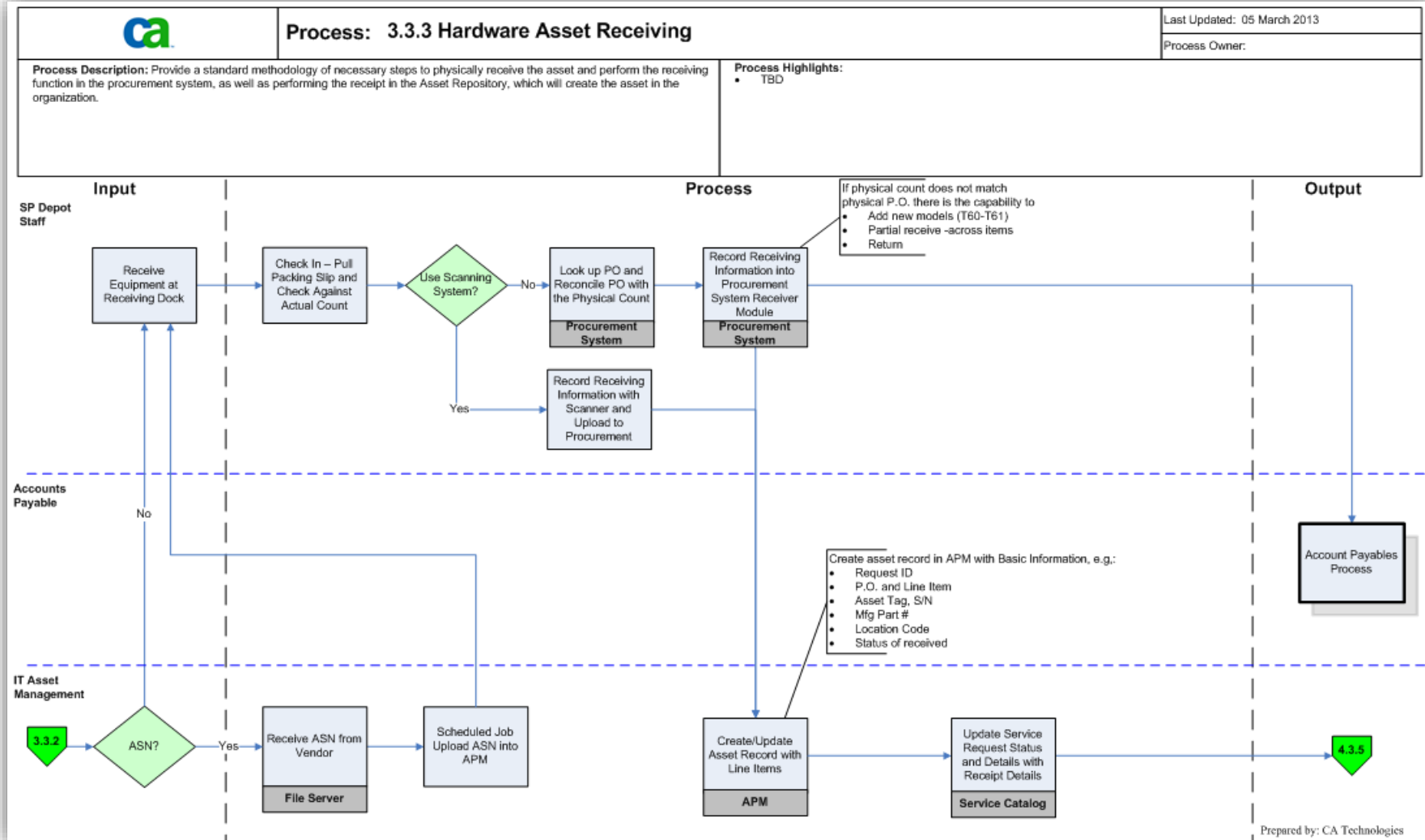
Acceleration services build on the initial deployment with options that can be adopted on a timeframe appropriate for each organization

# CA Service Management Playbooks...



# ITAM Lifecycle Process

## Example Hardware Asset Receiving



# Implementation Services

## **Asset Management**

Provides four starting points (Foundation Services): CA Hardware Asset Management; CA Software Asset Management; CA IT Asset Management (Hardware + Software); CA Software Asset Verification

Acceleration Services allow for additional manufacturers, discovery data sources and additional master/ownership data.

# Implementing IT Asset Manager

## *Approach & Benefits*

Phase/Stage	Activities	Result
PLANNING	Establish ITAM Program using CA's Requirements Specification and Master Use Case Library to guide the process	Awareness, Roadmap, Roles & Responsibilities
SAM ENTITLEMENT WORK STREAM	<ul style="list-style-type: none"> <li>Customer Led activity</li> <li>Detailed review of all contracts (by vendor) to extract contract, license and entitlement information.</li> <li>Identify standard software titles and software titles that required extended catalog entries.</li> </ul>	<ul style="list-style-type: none"> <li>Completion of the Data Collection Template –software contract information, license and entitlement information</li> <li>Identification of standard license titles that can be managed through Master Catalog</li> <li>Identification of extended catalog entries that will require additional data, software recognition rules and license engines</li> </ul>
PROCESS WORK STREAM	<ul style="list-style-type: none"> <li>Establish ITAM processes and sub-process using the CA ITIL Content Pack –<b>which is made available to CA Customers at no charge</b></li> <li>Establish RACI Matrix showing new roles and responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>Best practice ITAM processes</li> <li>Integrated ITAM processes into existing ITSM processes (Request, Incident etc.)</li> <li>Identification of organizational changes that need to occur</li> <li>Identification of training program required</li> </ul>
ARCHITECTURE & DESIGN	<ul style="list-style-type: none"> <li>Develop Architecture and Design documents</li> <li>Complete Data On Boarding Discussions and Mapping</li> <li>Complete Configuration Workshops</li> </ul>	<ul style="list-style-type: none"> <li>Best practice architecture refined to fit Customer requirements</li> <li>Optimized for performance and scalability</li> </ul>
ITAM – APM IMPLEMENTATION	<ul style="list-style-type: none"> <li>Implement Hardware Asset Management with APM</li> <li>Integrated with Reference/Ownership data sources</li> <li>Integrated with Hardware Contract information.</li> <li>Integrated with Service Desk, Service Catalog and CMDB</li> </ul>	<ul style="list-style-type: none"> <li>Transparency and Control over HW Asset Life Cycle</li> <li>Vendor control</li> <li>Cost control</li> <li>Redeploy assets, avoid overpurchasing</li> <li>Automation, operational efficiency</li> </ul>
ITAM – SAM	<ul style="list-style-type: none"> <li>Implement Software Asset Management with CA SAM</li> <li>Integrated with Discover Data sources</li> <li>Integrated with Software Contract Information</li> <li>Integrated with License/Entitlement information</li> <li>Integrated with APM Component</li> </ul>	<ul style="list-style-type: none"> <li>Software Compliance</li> <li>Efficient use of existing licenses</li> <li>Redeploy licenses</li> <li>Cost Optimization</li> <li>Operational efficiency</li> </ul>

# Getting Started



## There is No Silver Bullet

- Provide Customers with a time to market solution within a 3 month time line
- Includes a training program to provide the knowledge to a Customers core team to enable day to day operation
- Training will provide a knowledge level to Customers to allow them to plan and schedule the remaining phases of their ITAM journey at a pace that can be managed by the Customer organization
- The Foundation pack enables upcoming audit schedules and confirmation that the CA ITAM solution can provide solid return on investment in a short period of time



## Volumes of Discovery Data

- Implementation in 2 environments (Dev/UAT & Production or Dev & UAT)
- Integration into one discovery tool (ITCM or SCCM)
- On-boarding of data from one source for each of (Location, Cost Center, Legal Entity, Hardware Models, Device relationships, Contacts)
- Configuration of CA ITAM-APM component to facilitate hardware asset management and reconciliation of Windows Desktop devices
- Configuration of CA ITAM-SAM to facilitate software asset management and compliance activities associated with Microsoft Windows software titles for desktop that map to manufacturers standard license metrics.

# Global User Community and MyCA

- CA Service Management Global User Community with over 3,000 members
- Social environment to share information and best practices with your peers
- Learn new tips and tricks
- Online bookshelf of product documentation
- Frequent webcasts
- Interact with CA Support
- Hosted by CA Technologies and managed by YOU!

The screenshot displays the CA Service Management Global User Community website. The interface includes a top navigation bar with links for Home, Communities, and Support. Below this, there's a search bar and a list of community members. A table of recent posts is visible, showing details like the post title, author, and date. A large circular graphic with the text 'MyCA' and 'connect learn share' is overlaid on the right side of the screenshot.

# Tools to get there



## **CA Flipboard Cookbooks**

Articles posted daily  
for your CA Service  
Management solution



## **New Wiki style documentation**

Easy to navigate so  
you can find the  
answers you need

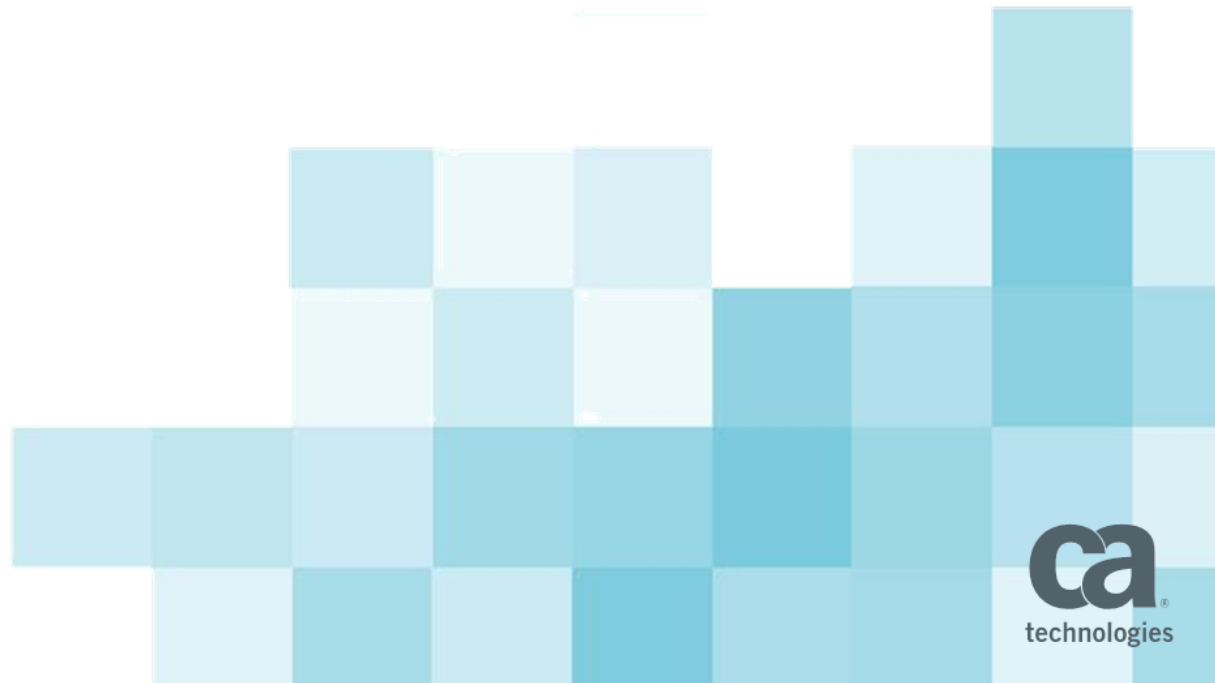


## **Free YouTube training videos**

Quick and easy how-to  
videos available on the  
CA eduCate channel



# Summary



# CA Service Management

## *IT Asset Management*



### INTEGRATED SOLUTION

- Integrated with CA Service Desk Manager, CA Process Automation, CA Client Automation, CA Server Automation
- Integrated MDB
- Common Install & Administration
- Unified Self-service



### HARDWARE

- Lifecycle Management
- Contract Management
- Financial Management
- Vendor Management



### SOFTWARE

- Lifecycle Management
- Master Catalog
- License-Centric
- Effective Licenses
- SKU Recognition
- Effective Demand
- Product and Usage Metrics
- Financial Position
- License Optimization & Simulation

# Why CA for IT Asset Management

## Improved User Experience

- User-interface offers more intuitive navigation and greater flexibility
- Collaborative self-service business consumer experience
- “My Resources” enables business consumer to view all their IT assets and take action
- Simple configuration
- “Smart” install and upgrade decreases cost of ownership

## Increased Productivity

- Enhanced search capabilities enable you to get to relevant information faster
- Respond with greater efficiency to asset related service requests and support calls
- Common Administration across CA Service management solutions reduces administration time: multi-tenancy, users, roles, configurations
- Automation: hardware reconciliation, import scheduler, software license optimization

## Reduce Business Risk

- Software Asset Management capabilities reduce audit risk and optimize IT spend on software
- Advanced reporting and analysis for better decision support
- Built-in (OOTB) content for consistency and accelerate time to value

# Proven Global Service Management Experience

## Technology



## Finance & Insurance



## Consulting



## Public Sector



## Healthcare and Other



# Proven value!

## First Horizon Mitigates Risk and Effectively Manages Assets <sup>(1)</sup>

- Tracks 6,000 software titles and 5,600 hardware assets
- Reduced risk of audits and fines
- Increased asset reuse, saving costs



## MCB Bank Ltd Increases Compliance with Service Level Agreements by 180 Percent with CA Service Desk Manager<sup>(2)</sup>

- 18,000+ tickets per month
- Simplified compliance with industry regulations
- Reduced the number of service desk analysts



## CA Technologies Saves \$23 Million Through Greater Control of Global IT Assets<sup>(3)</sup>

- Tracks 137,500 assets from procurement through disposal
- 15,500 assets reallocated rather than purchased
- Elimination of more than 48 tons of electronic waste



(1) As published in *First Horizon Mitigates Risk and Effectively Manages Assets with Greater Intelligence and Automation*

(2) As published in *MCB Bank Ltd Increases Compliance with Service Level Agreements by 180 Percent with CA Service Desk Manager*

(3) Savings over 7 years; CA Asset Management Team

# Proven value!

## FEMSA Manages More than 80,000 IT, Finance and HR Tickets with CA Service Desk Manager <sup>(1)</sup>



"...enabled FEMSA to add new services on short notice."

- Raul Homero Collins Gonzalez, Gerente Help Desk & Call Centers, Fomento Economico Mexicano - FEMSA, 07/01/2015

## G&T Continental Achieves 95 Percent User Satisfaction <sup>(2)</sup>

- Resolution time reduced 80%
- First-time fix rates exceeding 50%
- 15% drop in business critical incidents



## Punjab National Bank achieves 165% ROI<sup>(3)</sup>

- Significantly reduced the volume of issues
- Increased first-time resolution rates
- 60% reduction in the time it takes for issues to be resolved



(1) As published in [\*FEMSA Manages More than 80,000 IT, Finance and HR Tickets with CA Service Desk Manager\*](#)

(2) As published in [\*G&T Continental Achieves 95 Percent User Satisfaction with CA Technologies Solution\*](#)

(3) As published in [\*Punjab National Bank Achieves 165% ROI with CA Technologies IT Management Solutions\*](#)

Thank You