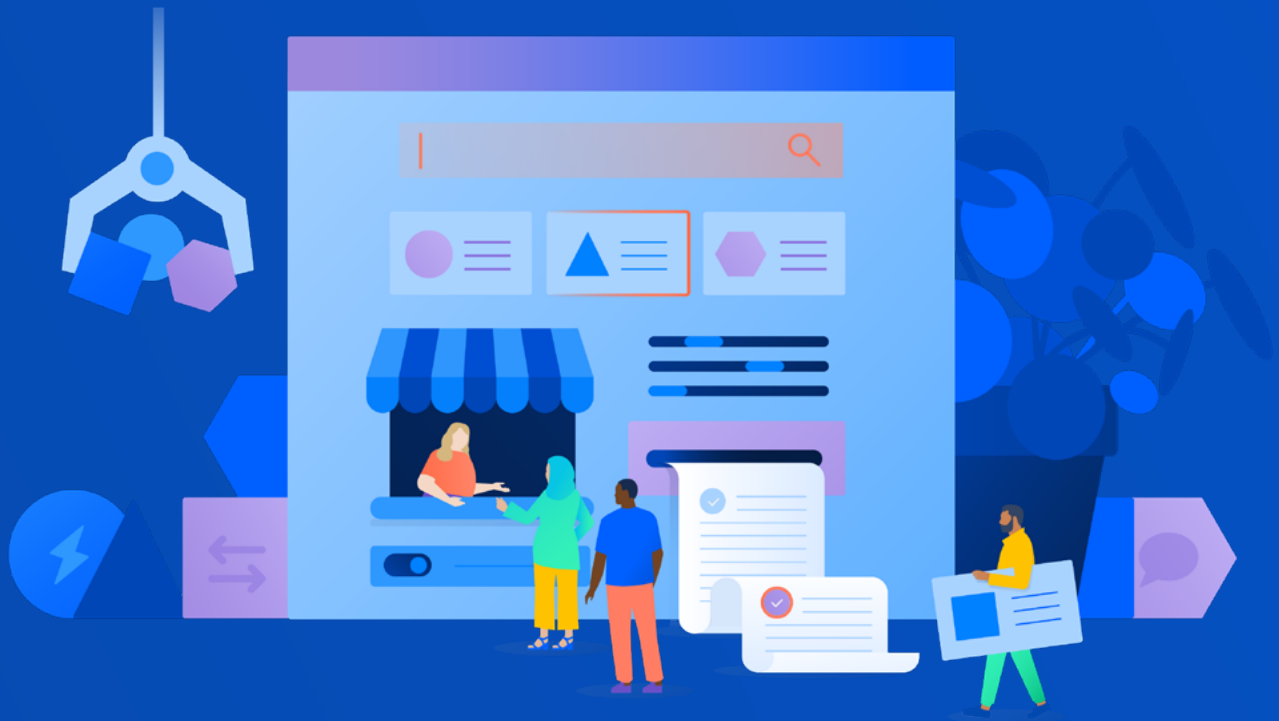




# IT Asset and Service Configuration Management in Jira Service Management



# Contents

6	Foreword
7	<b>Part 1: Atlassian's approach to IT asset and service configuration management</b>
8	About IT asset and service configuration management
8	What is IT asset management?
9	What is service configuration management?
11	Customer pain points
12	Real-world examples of why IT asset and service configuration practices matter
12	Qualys response to ProxyNotShell Microsoft Exchange Server Zero-Day Threat
12	New York Stock Exchange (NYSE) glitch
13	Why does getting this right matter for the evolution of ITIL, ITSM, ESM, and DevOps in your organization?
15	IT asset management
15	Service configuration management
17	Return on investment for IT asset and service configuration management
18	Why IT leadership values IT asset and service configuration management
19	The Atlassian approach

23	<b>Part 2: Navigating Assets in Jira Service Management</b>
24	Key terms
25	Object schema
26	Object type
28	Attribute
31	Object
31	Reference
33	Status
34	Role
36	Service registry
37	<b>Assets</b> custom fields
38	<b>Assets</b> reports
42	Automation
43	<b>Assets</b> Discovery
44	Integrations and data imports
44	Jira Service Management plans and <b>Assets</b> functionality
49	<b>Part 3: Good Practices for IT Asset and Service Configuration Management</b>
50	Why use <b>Assets</b> in Jira Service Management?
52	How do I get started with <b>Assets</b> in Jira Service Management?

53	Activity 1 - List objectives and measurable outcomes that support business goals and strategies
55	Activity 2 - Develop a top-down, lean approach to design your service model architecture
57	Activity 3 - Identify data, workflow, and roles that support key business processes
58	Activity 4 - Outline your asset/configuration dataset
59	Activity 5 - Develop metrics that demonstrate improvement in key business outcomes
60	How do I build assets using <b>Assets</b> in Jira Service Management?
65	Use Case - Tracking a Jira request for an employee laptop
65	Step 1 - Create an object schema for Facilities
71	Step 2 - Create an object type and objects for Buildings
76	Step 3 - Create Floor and Room object types
80	Step 4 - Create Temporary Locations object type
81	Step 5 - Create an object schema, object type, and objects for Employees
91	Step 6 - Create an object schema and object type for Business Partners
96	Step 7 - Create an object type and objects for Manufacturers
100	Step 8 - Create an object types and objects for Vendors and Suppliers
104	Step 9 - Create an object schema for IT Assets



108	Step 10 - Create an object type for Hardware
117	Step 11 - Create an object type for Laptops
118	Step 12 - Configure the IT Assets object schema to import laptop data
130	Step 13 - Create custom field to store laptop data in a request
139	Step 14 - Associate new custom fields with a project request
143	Step 15 - Create automation for updating a laptop
160	Step 16 - Create a request for an employee laptop
<b>166</b>	<b>Appendix</b>
166	Checklist of next steps
166	Build your business case
167	Understand what data you need
167	Implement



# Foreword

IT asset management and service configuration management are both critical components for excellent IT service management (ITSM). Similar to other ITSM practices (e.g., incident, problem, change, etc.), IT asset and service configuration practices are well-established and, at the same time, continuing to evolve. This juncture of traditional concepts and innovative, modern tools produces a new landscape for users to explore and develop.

This handbook will describe Atlassian's approach to IT asset and service configuration management based on ITIL 4 principles and ITSM system implementation learnings using Jira Service Management. Our goal here is to guide you through IT asset and service configuration management practices and provide inspiration for applying them to different services to give more value to your organization.

You may want to think of this document as a travel guide. Read the sections that match where you currently are on your journey and skip over the parts you already know or have seen. The document will walk you through the basics of IT asset and service configuration practices, describe the structures of **Assets** in Jira Service Management, lay out a solution for a common ITSM use case, and provide a high-level checklist to implement your own IT asset and service configuration management strategy.

Wherever you are in your IT asset and service configuration journey, this guide should offer useful information.



# 01

---

**Atlassian's approach to IT asset and  
service configuration management**

# About IT asset and service configuration management

Both are practices designed to help you understand what key business objects you own and how they're being used, so you can make better decisions, improve the efficiency of various processes, and ultimately, save the business money.

## What is IT asset management?

**IT asset management** (also known as ITAM) is the process of ensuring an organization's IT assets are accounted for, deployed, maintained, upgraded, and disposed of when the time comes. Put simply, it's making sure that the valuable items, tangible and intangible, in your organization are tracked and being used.

**i** An asset is anything that is valuable enough to your business that you want to track it. Common IT assets include:

- Laptops
- Servers
- Phones
- Monitors
- Software
- Network equipment

The same asset management principles can apply to non-IT assets. We often see items like office equipment, buildings, vehicles, contracts, and vendors being stored as assets, too.

**ITIL 4 definition for IT asset** - Any financially valuable component that can contribute to the delivery of an IT product or service.

# What is service configuration management?

**Service configuration management** ensures that accurate and reliable information about the configuration of services, and the configuration items (CIs) that support them, is available when and where it is needed. This includes information on how CIs are configured and the relationships between them. This high-level view is often called a service map or service model and forms part of the service architecture.

 Examples of IT configuration items include:

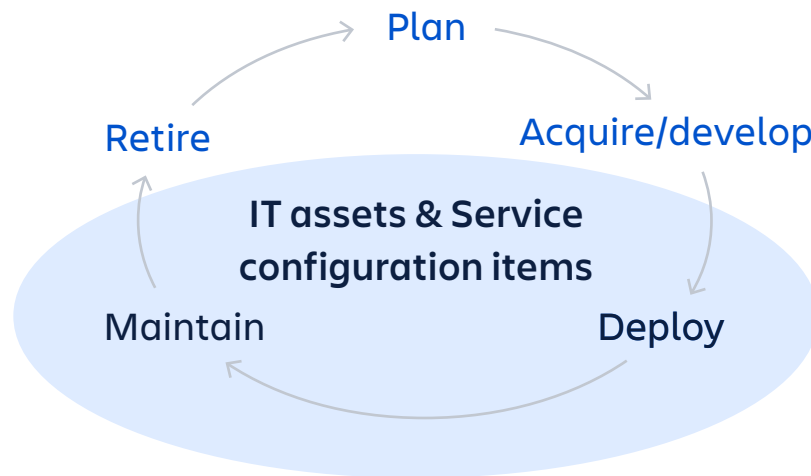
- Laptops
- Servers
- Virtual machines
- Software
- Network adapters
- Databases

Just like with assets, configuration items can expand beyond IT.

Examples include employees, procedure documents, vendors, and more.

IT asset and service configuration management can be thought of as “combined” practices using different perspectives.

- IT asset management is about **content**, understanding what we have, making sure we keep track of our very important stuff, making good purchasing decisions, and other financial considerations.
- Service configuration management is about **context**, understanding the relationships between our very important stuff and how it all relates together, so we can understand impact.



# Customer pain points

What happens if you don't use IT asset and service configuration management?

You can avoid investing in IT asset and service configuration management and not employ the practices at all; however, you will probably pay in other ways:

- **Siloed data** across different systems and owners, so there is no single source of accurate data
- **Slow response time to customers** because staff doesn't have quick access to available equipment data
- **Unexpected outages** from incorrectly modifying system components because you couldn't accurately determine which components were impacted by a change
- **Increased costs** related to unused equipment and unnecessary licenses/support
- **Manual effort** (months) to determine which system components should change when requirements change
- **Failed implementations** because your project's requirements changed, and you didn't communicate the changes to all parties

IT asset and service configuration management are included as key practices used by development and operations teams because they work! These practices keep you from incurring costs preventatively and help IT stop firefighting. Moreover, teams have learned, through practical experience, that these practices pay for themselves many times over by reducing cybersecurity risk and improving operations. Using IT asset and service configuration management allows teams to focus on innovation rather than fighting chaos.

## Real-world examples of why IT asset and service configuration practices matter

### Qualys response to ProxyNotShell Microsoft Exchange Server Zero-Day Threat

In September 2022, GTSC, a Vietnamese cybersecurity company, reported active attacks against Microsoft Exchange that include two critical vulnerabilities (now named “ProxyNotShell”) in Microsoft Exchange Server via advisories issued by Zero-Day Initiative.

The first flaw is a Server-Side Request Forgery (SSRF) vulnerability and the second flaw allows remote code execution (RCE) when PowerShell is accessible to the attacker. When successfully exploited, this combination of vulnerabilities resulted in an authenticated RCE attack.

Threat actors are chaining these two zero-day vulnerabilities to deploy Chinese Chopper web shells on vulnerable Microsoft Exchange Servers for persistence and data theft.

Because of their IT asset and service configuration management capabilities, Qualys provided its customers with the tools to identify and manage potentially vulnerable assets in their environments within hours of the threat announcement.

[Read more](#)  
[Full article](#)

### New York Stock Exchange (NYSE) glitch

A software glitch prevented the New York Stock Exchange (NYSE) from processing stock trades for almost 90 minutes.

The financial markets felt the impact even beyond the NYSE trading floor. Since investors couldn’t calculate market indexes without NYSE data, trading also stopped at the American Stock Exchange and some futures and options markets. Trading also slowed on the NASDAQ Stock Market, due to investor reluctance to do business without information on NYSE trading.

A new software installation caused the problem. The NYSE had installed the software on 8 of its 20 trading terminals, and the system was tested the night before go-live. However, on the following morning, a total of 8 installations failed to operate correctly. The NYSE tried to switch back to its old software, but was unable to do so before the opening of the trading session.



Although you might see this as a failure of the NYSE's service configuration management process, in reality, it was a success. Although the problem didn't arise until right before the opening of trading, the NYSE had robust service configuration management processes and tools, which identified and recovered from the problem quickly. Other than some red faces at the NYSE, the damage was minimized. Had the outage continued for longer than 90 minutes, the repercussions would have been much more severe.

[Read more](#)  
[Full article](#)

## Why does getting this right matter for the evolution of ITIL, ITSM, ESM, and DevOps in your organization?

IT asset and service configuration management are established ITIL practices that help companies plan/manage IT services and deliver value to their customers. However, the ITIL and ITSM practices continue to evolve to support organizations and their digital transformation -- including DevOps which allows companies to develop and improve products at a faster pace than traditional software development and infrastructure management processes.

ITSM is simply how IT teams manage the end-to-end delivery of IT services to customers. This includes all the processes and activities to design, create, deliver, and support IT services. A team's approach to ITSM can be structured to align with ITIL practices and influenced by DevOps concepts for more efficient service delivery.

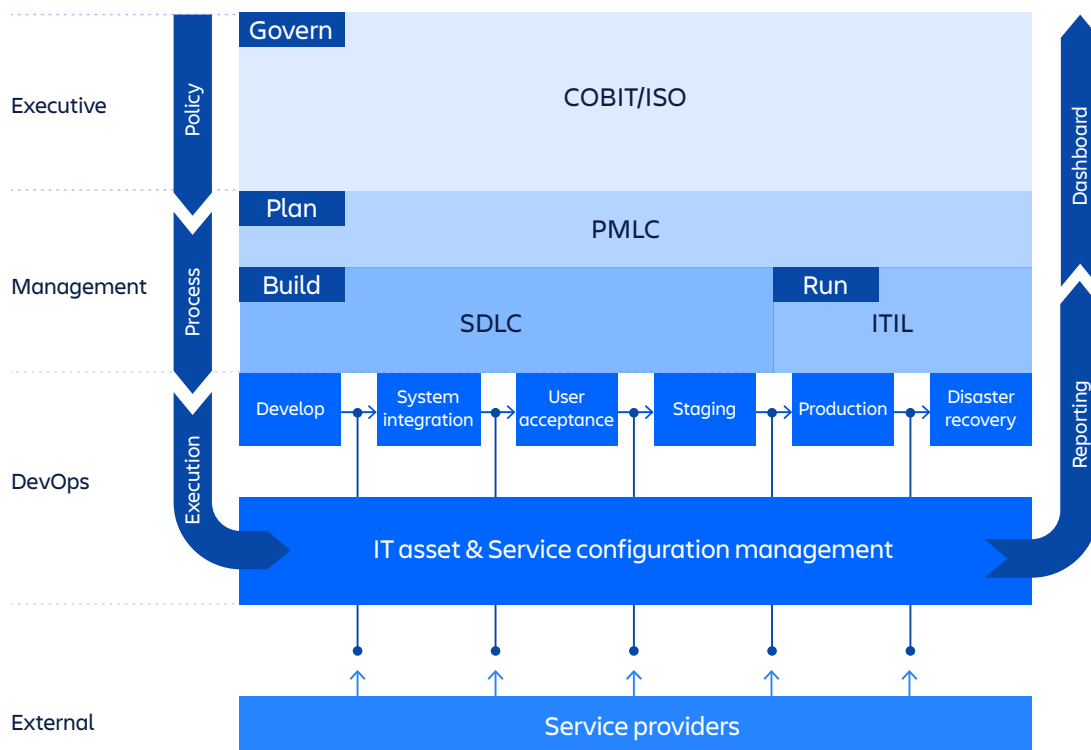
ITSM continues to evolve to meet changing business demands and now comprises flexible and user-friendly service management solutions that support both IT and non-IT use cases. Hence, an integrated approach to Enterprise Service Management (ESM) becomes more important than ever. ESM uses ITSM principles and capabilities in business functions to improve their performance, service, and outcomes. ESM improves visibility and access to enterprise services of all forms, accelerates service delivery and supports core ITSM processes, such as incident, problem, change, request, and IT asset and service configuration management. The traditional IT service catalog has evolved to focus not just on handling IT tickets, but on providing a holistic, user-centric platform for services such as resource tracking, repair handling, and more.

ITIL is the most widely accepted approach to ITSM. ITIL focuses on practices for aligning IT services with business needs. ITIL can help organizations adjust to ongoing digital transformation and scale. ITIL 4, the recent update to ITIL standards, represents a paradigm shift for IT teams. It guides teams to a business- and customer-value frame of reference and encourages a more adaptable, high-velocity approach based on how your team works. The ITIL 4 Guiding Principles promote collaboration, simplicity, and feedback.

DevOps emphasizes accelerated IT service delivery enabled by updated agile and lean practices. DevOps also focuses on improved collaboration between development and IT operations teams, so organizations can build, test, and release software faster and more reliably. The promised benefits include increased trust, faster software releases, an ability to solve critical issues quickly, and better management of unplanned work.

As you can see from the diagram below, it's crucial to think through how you plan, build, run, and govern processes and data transactions. By combining ITIL, ITSM, and DevOps approaches, teams broaden their scope beyond just developing and delivering new features. They also prioritize the ongoing performance of these functionalities during live operations and recognize the value they bring to customers.

Furthermore, all these practices depend on a reliable, accurate source of asset and service configuration data to achieve their objectives.



## IT asset management

Too often, IT assets are tracked in many different places by many different people. Naturally, chaos and inaccuracy follow, and IT teams can't make informed decisions. As IT evolves, teams become more reliant on SaaS (Software as a Service) vendors for critical services, and it's necessary to track the consumption of "on-demand services" in dynamic cloud environments. IT asset management must adapt from spreadsheets to more effective, modern practices. With increased control, visibility, and assigned responsibility, teams can reduce excess consumption, including over-provisioning and idle instances, to avoid unnecessary costs. A recent [ITAM Review report](#) indicated that computer hardware is still the top IT spending category, accounting for 30% of overall IT budgets, which is why IT asset management is crucial to master.

## Service configuration management

In an era of cloud computing and anything as a service, IT teams are now managing a very different type of IT environment. While they may rely on a Configuration Management Database (CMDB), many IT organizations struggle to find value in their CMDB implementations and have even experienced failed CMDB projects. They're not alone. According to a [Gartner report](#), 75% of CMDB initiatives fail.<sup>1</sup> The reason stems from starting a CMDB deployment with too wide of a scope. As a result, teams attempt to collect large amounts of information (valuable or not) upfront and struggle to maintain and keep it current. The deployment ultimately shows little value for the organization and, instead, results in lengthy projects and wasted resources.

According to *Foundation ITIL 4 Edition* (Axelos Limited, 2019), "It is important that the effort needed to collect and maintain configuration information is balanced with the value that the information creates. Maintaining large amounts of detailed information about every component, and its relationships to other components, can be costly, and may deliver very little value. The requirements for service configuration management must be based on an understanding of the organization's goals, and how service configuration management contributes to value creation."

Decision making requires data. Effective decision making requires reliable data.

<sup>1</sup> Gartner, Inc. "Break the CMDB Failure Cycle With a Service Asset and Configuration Management Program." Published 5 May 2020.

Accurate information regarding system assets and configurations improves request fulfillment, service delivery, audit processes, and software development and debugging. A [Forrester report](#) emphasized the benefits of a CMDB in providing high-quality services and support, and the economic benefits this yields for a business.

Benefits of IT asset and service configuration management include:

- Reduced risk of outages and security breaches through visibility and tracking of the changes to your systems.
- Cost reduction by having detailed knowledge of all the elements of your configuration, avoiding wasteful duplication of your technology assets.
- Improved experience for your customers and internal staff by rapidly detecting and correcting improper configurations that could negatively impact performance.
- Greater agility and faster problem resolution, enabling you to provide a higher quality of service and reduce software engineering costs.
- Efficient change management by knowing your baseline configuration, and having the visibility to design changes that avoid problems.
- Quicker restoration of service. In an outage, you'll be able to recover faster because your configuration is documented and automated.
- Better release management and clear status accounting.

Today's enterprises rely on increasingly complex technology environments, with IT assets ranging from software to purchase orders to laptops or servers. With IT asset and service configuration management software, you can better track IT assets and service configurations in your inventory, minimizing delay and human error. When a new device configuration is discovered or when an IT asset's contract is close to expiration, you can receive actionable alerts designed to provide a real-time understanding of your IT asset inventory.

## Return on investment for IT asset and service configuration management

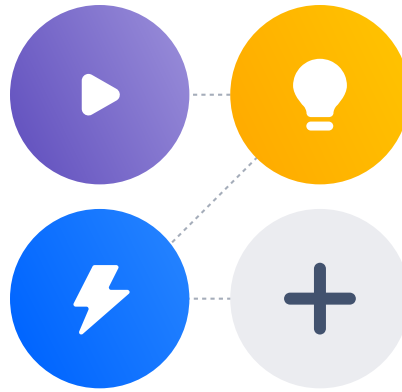
Some of the financial benefits contributing to positive ROI results found in leveraging IT asset and service configuration management include:

- IT cost reduction. Optimization of IT operations reduces costs in multiple areas, including infrastructure, outsourced services and management software.
- Service quality improvement. Ensuring that existing services are available at any time and new/enhanced services can be released quickly.
- Risk reduction. Reduction of downtime caused by system outages, cyber-attacks, security intrusions, and change and configuration activities.
- IT staff productivity increases. Optimization of IT staff activities through automation reduced IT staff time spent "keeping the lights on," freeing up valuable staff resources for business-related initiatives.

There are plenty of ROI calculations that you can apply to your business. The metric is cost avoidance in areas such as:

- The number of devices tracked and monitored by an IT asset and service configuration management system.
- The effort and cost for a system/network engineer to handle IT asset and service configuration management processes manually.
- When (not if) a system outage occurs with no backup configuration.
- A bulk configuration update to many systems, or a new required rollout.
- When your business has to comply with an IT asset or service configuration audit request or pass a technology risk assessment.

The benefits of IT asset and service configuration management flow into all these activities. These activities take time, and time is money.



## Why IT leadership values IT asset and service configuration management

Adoption of IT asset and service configuration management practices provides necessary visibility into an organization's technology landscape. IT asset management can be thought of as the "universe" of technologies, and service configuration management provides in-depth transparency into each asset therein.

These processes enable organizations to not only respond to security threats, but also run IT Operations effectively. When a cybersecurity event, like BlueKeep, occurs, the first question we ask ourselves is "what is impacted?". Not having a quick, definitive, concise answer spins up another unwarranted crisis – a desperate search for the "right answer." At that time, rightfully so, everyone volunteers, causing more chaos because everyone brings forward a different version of the "truth." In the end, when all the crises have been overcome, we reflect to realize that the price tag – the cost of business disruption, overtime, extra work, vendor fees, etc. – is enormous and unaffordable.

Because the technology landscape is constantly evolving with the adoption of new tools, our IT asset and service configuration management capabilities need to continuously improve and adapt to changing operational/business needs. And, given the dependency on organizational collaboration, agile capabilities need to be supported by an effective framework to drive expected outcomes and continuous improvement.

## The Atlassian approach

Atlassian's approach is to balance autonomy with alignment. We want teams to have the flexibility to run fast and operate with autonomy, while ensuring IT feels confident that work is aligned and doesn't introduce risk to the business.

Atlassian understands that every organization is different. Maybe you need to map complex dependencies across an enterprise. Or, you want to keep a record of intangible assets like licenses and compliance documents to reduce risk. Or perhaps your requirements are more straightforward and involve tracking an inventory of computers.

**Assets** is built on the Jira Service Management platform and provides scalable IT asset and service configuration tracking functionality to meet your high-velocity team's needs. **Assets** combines asset repository and CMDB capabilities required to effectively manage asset and CI data. Whether you're looking for a lightweight asset tracker or an enterprise-grade system, **Assets** in Jira Service Management empowers you to define your assets how you like, work with them in whatever way suits you and your business best, and provide a platform for extending system monitoring and maintenance through automation.

### ⚡ Jira Service Management



#### DELIVERY

Project management  
Change management  
Deployment management



#### OPERATIONS

Incident management  
Problem management  
Configuration management



#### SUPPORT

Service management  
Service request management  
Service level management  
Asset management

#### ✖ Confluence

Team workspace & knowledge management

#### PLATFORM

Automation & orchestration, reporting & analytics, and APIs

Atlassian's approach allows teams to unite on one platform, bringing delivery, operations and support into one collaborative experience. **Assets** in Jira Service Management provides IT, development, and business teams with visibility across critical business systems and enables collaboration regarding priorities and resource allocation.

With Jira Service Management on the same platform as Jira Software, all assets and related issues are stored in one place and teams can easily understand how assets relate to their workloads. You'll know the reason for acquiring the hardware, who it's assigned to, and its past history. Whether it's a trouble ticket, new hire requisition, or purchase order, Jira Service Management and Jira Software enable seamless communication, visibility, and reduced friction between dev and IT teams.

Teams can:

- Better respond to service requests by gaining greater context of issues
- Minimize IT risk by understanding the downstream impact of changes
- Troubleshoot and resolve major incidents and problems faster
- Track IT resources and gain visibility into the relationships between critical applications, services, and the underlying infrastructure
- Discover and track assets which aid with planning, audits, and compliance
- Manage assets outside of IT, including in HR, sales, legal, facilities, and other functions



**Based on Atlassian’s experience building software and working with thousands of high-velocity teams, we found the best performing IT teams typically use the following practices.**

## **Embrace a team-centric approach**

At Atlassian, we believe that open teams work better together. Many IT teams believe they’re using the “right” tools and following the “right” processes, but still fail to achieve results. In fact, these tools and processes can actually create inefficiencies, for example, between various IT Ops and Dev teams due to silos and lack of knowledge sharing. We found at Atlassian that establishing a culture around collaboration and transparency is the foundation of a successful IT asset and service configuration management implementation. By using the Atlassian suite, you’re already one step closer to leading your organization toward open knowledge sharing. Open and collaborative culture is infused in the Atlassian toolset.

## **Step back and start where you are**

As you define your organization’s culture and practices, ITIL 4’s Guiding Principles are a great place to begin. (In fact, we found them to be quite similar to the Agile Manifesto!) One of these principles is, “Start where you are.” With 34 ITIL 4 management practices to consider, this can feel overwhelming. Instead of building from scratch, take a moment to observe and analyze the services, methodologies, people, and tools you already have. Then use these insights to identify where to start and what to continue, change, or build upon.

## **Take a top-down approach starting with the service layer**

When beginning an ITSM deployment, the idea of fully defining your service model down to the infrastructure can be paralyzing. Instead of diving into infrastructure and microservices out of the gate, focus on the top services most critical to your business (such as an e-commerce platform if you’re a retailer). To identify these services, review tickets from the past few months to understand which services are most utilized.

## **Achieve quick wins with a minimal viable product**

For many organizations, getting employees to embrace change can be difficult. Maximize your chances for success by taking an agile approach to deploying your ITSM solution. Instead of rolling a full-blown solution at once, identify your organization's biggest pain points, and focus on the practice, service, or use case that will be most impactful. By starting with a minimal viable product (MVP) and iterating on the solution over time, you'll help your organization overcome the fear of change while satisfying a significant portion of your stakeholders.

## **Match your software stack to your maturity and needs**

In their 2022 Buyer's Guide for ITSM Platforms, Gartner predicted that "I&O leaders will overspend by \$2 billion on buying unused features of ITSM platforms in 2026, up from \$1 billion in 2021." <sup>2</sup> Instead of committing upfront to a costly ITSM platform with complex features you'll never use, take an adaptive approach to build your solution. The needs of your business are constantly changing so buy only what you need. Atlassian's ITSM solution offers out-of-the-box ITIL practices with the flexibility to scale as you grow. And, our broad ecosystem of Marketplace apps allows you to customize and extend your capabilities, without the need for specialized consultants.

## **Scale your solution and celebrate success**

As you continue on your journey, communication is critical to increasing adoption. Once a service or practice is up and running, shout it from the rooftops. Offer hands-on training, pass out stickers, and incentivize usage through contests. Our customers have found that after adopting Jira Service Management for IT, business teams, from HR to Legal, begin to realize the value and request service desks of their own. To manage and scale this growth, treat each request as an endeavor of shared objectives. Seek first to understand the problem each team is facing, and solve it in a consultative manner. Finally, don't forget to celebrate each milestone with your team!

<sup>2</sup> Gartner, Inc. "A Buyer's Guide to ITSM Platforms." Published 4 August 2022.

# 02

---

## Navigating **Assets** in Jira Service Management

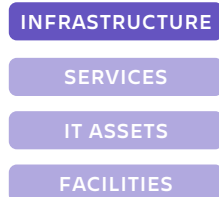
# Key terms

**Assets** in Jira Service Management is a versatile tool that records and maps the relationships and dependencies between your assets, CIs, and services.

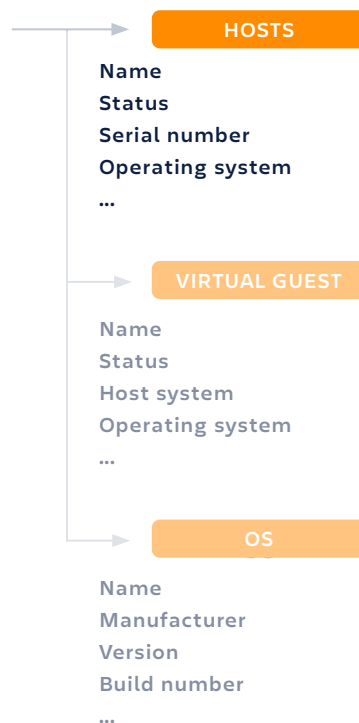
**Assets** functionality clears away the unneeded boundaries between asset and service configuration management. It's a database of objects – digital representations of your assets, ranging from hardware and software to employees or various CIs. You can make your objects whatever you need them to be, and have them displayed in and be affected by issues in Jira Service Management, and even in Jira Software.

**Assets** in Jira Service Management is comprised of a few basic entities: object schema, object types and attributes, and objects and their relationships.

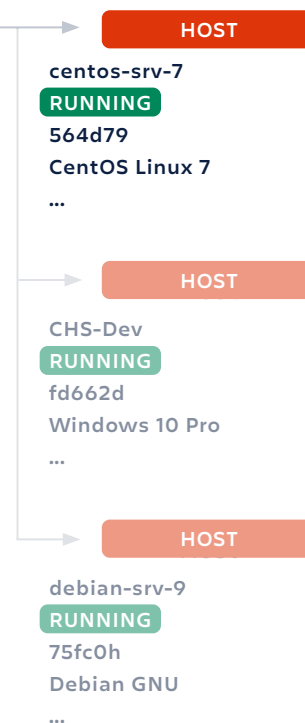
## Object schemas



## Object types and attributes



## Objects



## Object schema

An **object schema** is a collection of information used to track assets, CIs, and resources, and to understand and visualize the critical relationships between them.

Each object schema holds unique information in the form of object types, objects, attributes, icons, references, and statuses. An object schema also has its own set of permissions and automation, which allows you to hide or show different information and perform various actions for different users or groups.

Object schemas work like maps that hold all of your assets, CIs, and resources together. You can have many object schemas and refer to objects inside them from your issues and requests.

**Note:** The **Services** object schema is a special case – it contains services that your site uses across multiple projects. The Services object schema will be covered in a later section.

### PRO TIP

When creating object schemas, you should consider the following:

- Which groups will access, own, and maintain the data? For example, if the IT team updates server data and the HR team updates employee info, you should create different object schemas for these data types.
- How is the data acquired? For example, if phone data is based on a data feed from an external vendor, then the data should be tracked in a separate object schema.
- How is the data used? If object schema data is used similarly across service projects, the data should be stored in a single schema object. For example, if multiple projects reference departments, then the data should be stored in a single object schema.

## Object type

An object type groups objects that use the same kind of information, conveyed through their common attributes. Rather than a single PC, your object types would be Computers, Hardware, Software, Employees, and so on. You can create as many different object types as you like, and then group your various objects within. Object types can be whatever you want them to be because **Assets** is very open and flexible.

Common object types include:

- Business services
- Hosts
- Laptops
- Software

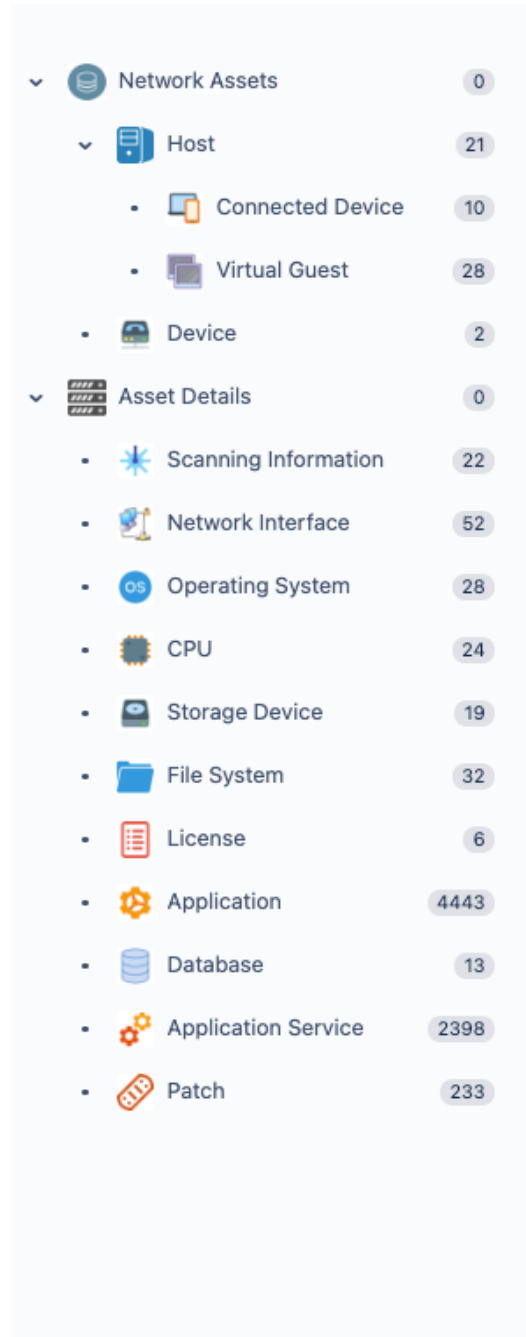
But, they don't have to be IT assets. For example, many people add other useful information, such as:


















- Vendors
- Locations
- Employees
- Medical equipment

### PRO TIP

When creating object types:

- Use unique object type names within an object schema.
- Use less than 30 object types in an object schema when possible. This will simplify the screen and make maintaining the data easier.



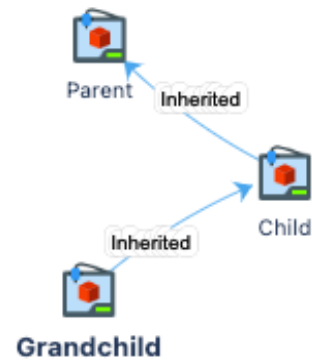
▼	 Network Assets	0
▼	 Host	21
	▪  Connected Device	10
	▪  Virtual Guest	28
	▪  Device	2
▼	 Asset Details	0
	▪  Scanning Information	22
	▪  Network Interface	52
	▪  Operating System	28
	▪  CPU	24
	▪  Storage Device	19
	▪  File System	32
	▪  License	6
	▪  Application	4443
	▪  Database	13
	▪  Application Service	2398
	▪  Patch	233

Additionally, you can configure object types to inherit attributes from their parent object types. This is useful if you need to create multiple object types, nested in one another, and want them to keep the same structure. Each object type has its own fields, but also “inherits” the fields from its parent.

A good example of inheritance is an object type Host, with child objects Linux Host and Windows Host, which inherit common attributes, such as IP Address and Hostname.

Generally, when an object type is a child or sub-type, it inherits all of the attributes of the parent type and then adds a few attributes of its own.

Additionally, you can set some object types as abstract, meaning that they can’t contain any objects of their own but can pass their attributes to their children, who can themselves contain objects. Inheritance and abstract object types can be used to create object schemas that are both simple and powerful.



#### PRO TIP

Through simple drag-and-drop, you can organize object types into a tree hierarchy in a way that makes sense for your organization. This tree is mainly for navigation and readability.

## Attribute

An **attribute** represents a specific piece of information that is attached to an object, such as a description of that object, its model number, another associated object, or a user assigned as the object's owner. Every object includes four default attributes: an attribute set as the object's label, the object's key, the date and time the object was created, and the date and time the object was last modified.

A label is the title of an object that appears wherever an object is referenced. The label of an object type is marked with the label icon in the **Attributes** view of the object type. The default label is the attribute "Name."

Attributes can hold many different types of information – text values, numerical values, or even references to other objects. The list below includes attribute types:

**Default** – Represents text, boolean, integer, float, date, date time, URL, email, text area, select, IP address, etc.

**Object** – Enables reference to another object

**User** – Enables selecting a user from a Jira group and connecting objects to users

**Group** – Enables selecting a Jira group and connect objects with the user(s) in specified Groups

**Project** – References a Jira Project to your objects

**Status** – Defines the statuses that should be allowed, and left empty means all statuses allowed



They can also be customized to hold very specific information, such as a postal code, a certain pattern of strings, an object of a particular type, or a mandatory value. Additional attribute configurations include:

**Unique** - Validate attribute values to be unique within the object type

**Cardinality** - Specify a minimum and maximum number value that can be associated with the attribute. This is common when you need to set an attribute multiple choice or required/mandatory.

**Validation** - Validate attributes of default type "Text," "Email," and "URL" with regular expressions. This can be handy if you want to validate specific information, like an IP address, a domain name, a phone number, or anything else that may require validation.

**Options** - You may add multiple Options to a "Select" Type Attribute by adding them as options

**Suffix** - For default type "Integer" and "Float" you can set a suffix for the attribute. An example is "\$" for an attribute "Salary"

**Show sum** - For default type "Integer" and "Float" you can choose to add the values and display the sum of the attribute values

**Filter objects** - For attribute of type "Object" you may filter objects to be selected by AQL (Assets Query Language). By using this filter it is possible to create dependencies to other fields when creating/editing objects.

**Include children** - For attribute of type "Object" you may include child objects in the reference

### PRO TIP

If an attribute is used in many places and has the same repeated values, it may make more sense to create a separate object type. For example, you may have an attribute for Vendor in the object types for Laptop, Phone, Printer, Monitor, etc.; for each object, you will type (or import) the vendor name for that particular laptop or phone. While this method works fine, it's more efficient to have an object type called "Vendor" and set each vendor as an object for a number of reasons:

- You may want to track additional information for vendors, such as a support contact number or links to contracts. Rather than repeating this data for every laptop or phone, you can simply link to the vendor object. This also helps if you want to perform elements of vendor management within Jira Service Management.
- The Vendor will be standardized this way, meaning reports are easier to run. If you wanted to report on the number of support requests per Vendor, you can be confident you're not missing something because someone wrote Microsoft or Apple somewhere.
- If the Vendor rebrands or needs to be changed in some way, then you only need to update it in one place.

Vendor is just one example but others include business importance levels, deployment environments, departments, and locations.

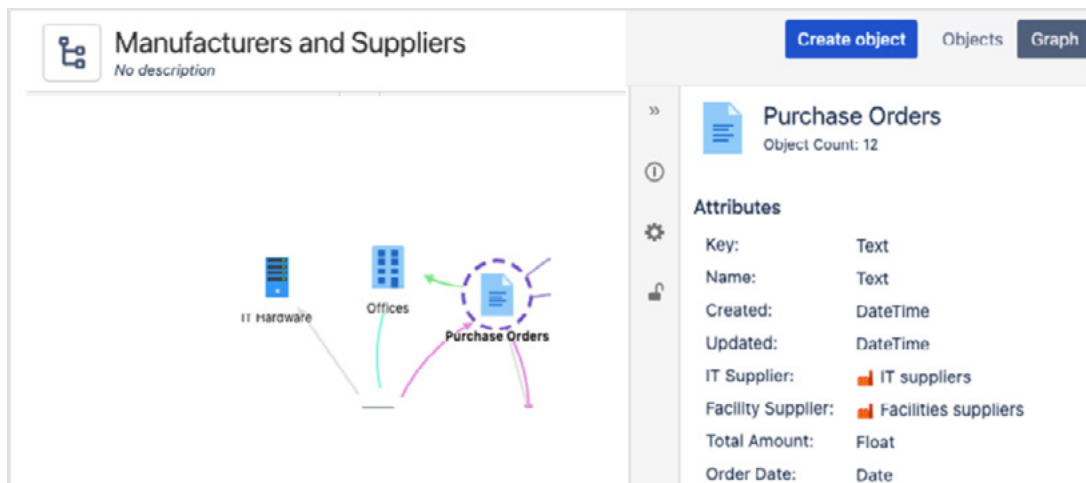
## Object

**Objects** are your actual assets or CIs. Every object is a digital representation of anything that you're mapping, be it a specific computer, employee, office they work at, or even a license for your software. You can create as many objects as you like, and group them within object types that represent their characteristics (an employee wouldn't be the best fit for the hardware object type).

Using object actions, you can keep your physical assets in check by printing labels and QR codes, view their dependencies with other objects, and see which Jira issues they're on.

## Reference

A **reference** is a connection between two different objects. Each object can be related to many other objects and dependencies defined resulting in a dynamic and powerful network of assets and CIs. References have a color and a name for better identification. This capability helps users to have meaningful graphs during impact analysis or dependency mapping, etc.



Object schema graph – see how all objects are knitted together using references.

Object details ×

```

graph TD
    Apple --> PROC-14567
    PROC-14567 --> MacBook[4 x MacBook Pro 13-inch (2020)]
    PROC-14567 --> Amsterdam[Amsterdam office]
  
```

**PROC-14567**  
[Object details](#) [Linked issues](#)

Key	SUP-5483473
Name	PROC-14567
Created	Oct 15, 2022, 2:23 PM
Updated	Aug 15, 2023, 5:57 PM
IT Supplier	Apple
Total Amount	5800.0
Order Date	Oct 15, 2022
Receipt Date	Oct 21, 2022
Approver	Cathi Davey
Discount Applied	false
Shipping Address	Amsterdam office
Line Items	4 x MacBook Pro 13-inch (...)

Object type graph - see an object type's relations with other object types

Because each reference is a link between an object and an attribute on another object, they are divided into two types: outbound references and inbound references.

- Outbound references point from the current object to another object (e.g., from printer asset to cubicle location)
- Inbound references point from another object toward the current object. (e.g., from stockroom to all assets stored in the location)

The direction of a reference is relative; it will change depending on which object you are examining. Additionally, each reference can have a 'Reference type,' which describes the type of relationship between two objects.

### PRO TIP

When defining **Assets** data structure, we recommend building meaningful sentences and setting the Object Type, Attribute, and Reference Names accordingly. For example:

"The printer is located in the room" is transformed into:

- Object Type: Printer
- Reference Name: Located in
- Attribute Name: Room

## Status

A **status** is a discrete state that could apply to an object. For example, a server could have the status “Running” or “Stopped” depending on if the server is working or not.

**Assets** in Jira Service Management includes a set of default statuses, but you can also add new statuses to represent the different states of objects in your environment.

Statuses can be global, or they can apply only to a specific object schema. Each status includes an optional description and a general category - active, pending, or inactive.








The status category is especially useful in tracking asset/CI lifecycles and developing automation.

### Configure IT Assets

General Reference types Statuses Roles Import

A status indicates the state of an object. You can create, update and delete different types of status for the current object schema here. [Learn more about statuses.](#)

Create a status

Id	Name	Description	Category	Actions
18	Disposed	Asset is disposed and removed from accounting records	 Inactive	<a href="#">Delete</a>
13	In Stock	Asset is in stock but not in use	 Pending	<a href="#">Delete</a>
23	In Transit	Asset is being transported	 Pending	<a href="#">Delete</a>
19	In Use	Asset is deployed and functioning	 Active	<a href="#">Delete</a>
22	Missing	Asset is not found in its expected location	 Inactive	<a href="#">Delete</a>
15	Ordered	Asset is ordered but not in stock	 Pending	<a href="#">Delete</a>
16	Retired	Asset is deployed but no longer in use	 Inactive	<a href="#">Delete</a>

## Role

A **role** is a set of permissions granted to Jira users or groups to view or modify data in **Assets**. Roles can have three levels:

**Global** - Allows you to configure the entire **Assets** application (Jira admin)

**Single object schema** - Allows you to configure and execute actions on the object schema level and all object types within that schema (Object Schema Manager, Developer, or User)

**Single object type** - Allows you to execute actions on an individual object type (Object Type Manager, Developer, or User)

Role	Description
<b>Assets</b> Administrator	This role can perform all actions in <b>Assets</b> in Jira Service Management. This includes: <ul style="list-style-type: none"><li>• Configuring <b>Assets</b> globally</li><li>• Managing individual schemas</li></ul> Note: <b>Assets</b> Administrator is a role given to all Jira Administrators by default. It is not possible to revoke this permission.
<b>Assets</b> Managers	This role can execute the following tasks on an object schema. This includes: <ul style="list-style-type: none"><li>• Configure all schema details</li><li>• View objects</li><li>• Search objects using basic and advanced search</li><li>• Create and edit objects</li><li>• Export objects</li><li>• Print QR codes and labels</li></ul>
<b>Assets</b> Developers	This role means builders or creators, rather than e.g. software developers. It can execute the following tasks on an object schema: <ul style="list-style-type: none"><li>• View objects</li><li>• Search objects using basic and advanced search</li><li>• Create and edit objects</li><li>• Export objects</li><li>• Print QR codes and labels</li></ul>
<b>Assets</b> Users	This role can do the following on an object schema: <ul style="list-style-type: none"><li>• View objects</li><li>• Search objects using basic and advanced search</li><li>• Export objects</li><li>• Print QR codes and labels</li></ul>

Special permissions apply to users when viewing or editing object custom fields (which we'll go over soon):

- Any user – even those who are not licensed for Jira Service Management or any Atlassian products – is granted a temporary “User” role when an object custom field is added to a request type that can be accessed by end-users on a portal. This allows them to view the object fields and their values.
- Jira Software, Jira Service Management, and Jira Work Management users can have temporary "Object Schema User" roles that allow them to view and edit the contents of an object custom field within issues where they already have existing edit permissions.

These roles will not count toward the total number of users on your license.

#### **PRO TIP**

- Object type permissions take precedence over object schema permissions. For example, a user might be assigned to the User role on the schema (to not make any changes), but then have a more powerful Developer role on a specific object type, so they can create objects.
- If you want users to work with object types (and objects), you need to grant them permissions for object types, but also for the schema (at least User permissions, so they can view it). Without giving them any permissions for the schema, they won't be able to access it.
- If you don't specify permissions for object types, they will be inherited from the object schema.

## Service registry

In ITSM, a service is a system, platform, or infrastructure that provides value to your business or customers. Services can include things like payment platforms, servers, teams of people (for example, a legal team), websites, products, or application stacks.

In **Assets**, you map, organize, and manage your services in the Services object schema. Services behave like ‘connectors’ in Jira Service Management and can be applied to your entire Jira site and used across all of your service projects.

For example, let’s say you set up three services in Jira Service Management: payment platform, website, and mobile app. You can set up their relationships: the website and mobile app both depend on the payment platform. Now, a change for the payment platform will include the mobile app and website as affected services.

Object details

```
graph TD; PP[Payment platform] --> W[Website]; PP --> MA[Mobile app];
```

Payment platform

[Object details](#) [Linked issues](#)

Key	SVC-95
Name	Payment platform
Created	Nov 17, 2022, 3:22 PM
Updated	Aug 15, 2023, 6:23 PM
Description	Payment platform
Tier	Tier 1
Service relationships	<a href="#">Website</a> <a href="#">Mobile app</a>
Service ID	ari:cloud:graph::service/cdde775f-d4a1-4822-9281-9a403e18fdda/bcaad/e-66ce-11ed-9afd-0abe3f4a6601
Revision	1461583433
Stakeholders	Ken Connally
Responders	Jennifer Fish
Service Owners	

Learn more

[How services work with \*\*Assets\*\* in Jira Service Management](#)



## Assets custom fields

In addition to the service registry, you can create **Assets** custom fields that allow your team to access assets directly from the issue view. This is a powerful feature that can help your agents get the context they need to resolve issues or requests quickly and effectively.

Using a custom field creates a link between an issue and an object. Adding an object (i.e., as a value) to the field allows you to see all of the connected issues from the object view.

The screenshot displays a Jira Service Management issue titled "New employee laptop request" (ID: ITSM-15434). The issue was raised by Darla Cote via API. The "Laptop models" custom field is highlighted with a green box and contains the following table:

MacBook Pro 13-inch (2020)	
Name	MacBook Pro 13-inch (2020)
Manufacturer	Apple
Screen Size	13-inch
CPU	Apple M1
RAM	16 GB
Cost	2000

The right sidebar shows SLAs (Time to resolution: 8h, Time to first response: 4h), Details (Priority: Medium, Request Type: Request a new laptop, Assignee: Carly Aydin, Reporter: Darla Cote), and related assets (Laptop models: LTTP032235, MP09520).

This is useful for incident management because you can use the graph to traverse through dependencies and understand where things have gone wrong. It's also useful for change management because it allows you to see the bigger picture and evaluate risk – easier to do when you can see what depends on the item you're making changes to.

[Learn more](#)

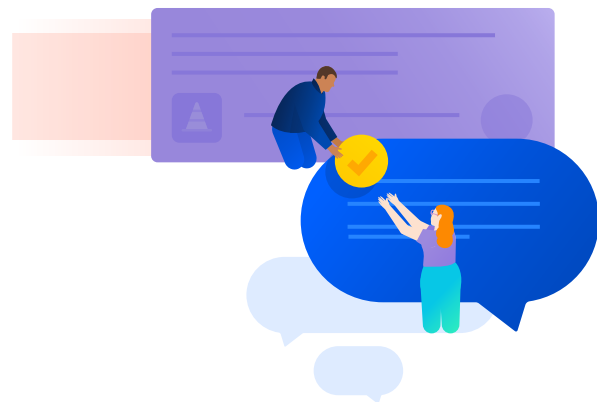
[What is the Assets Object field in Jira Service Management?](#)

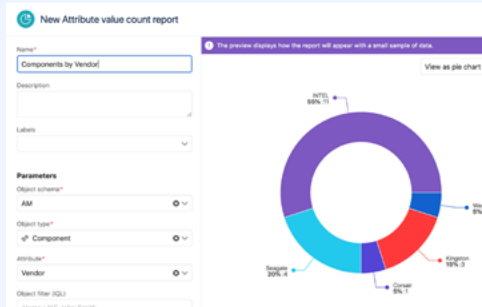
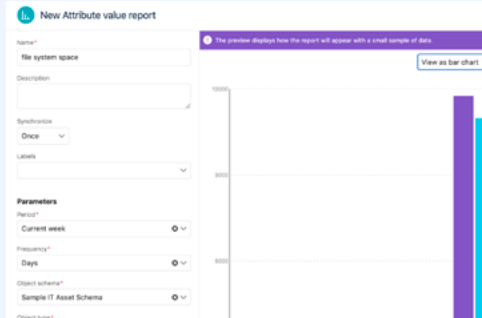
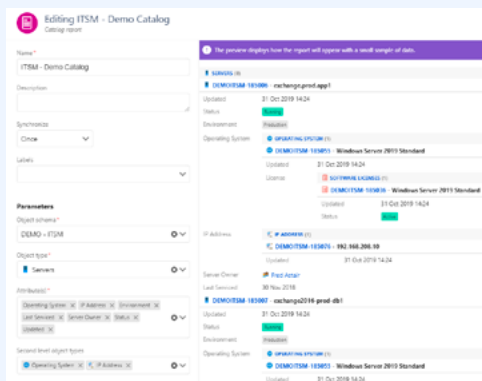
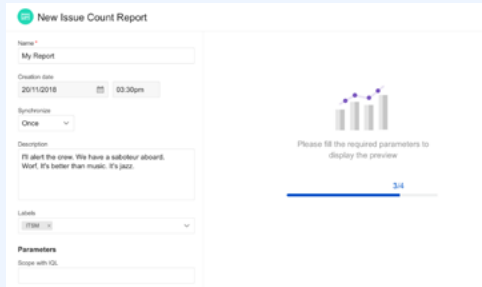
## Assets reports

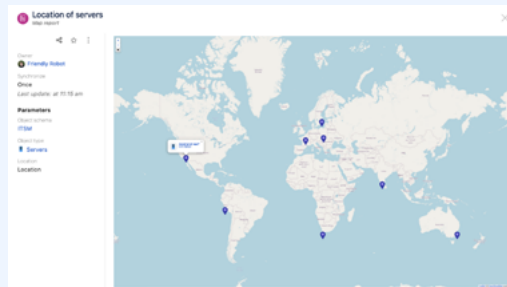
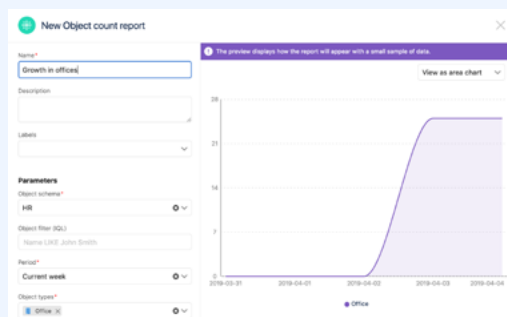
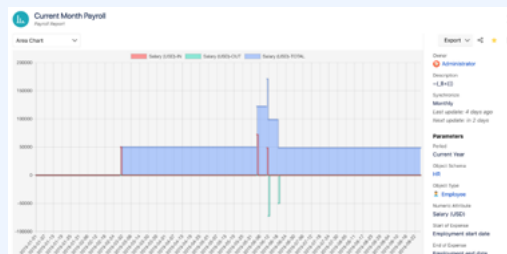
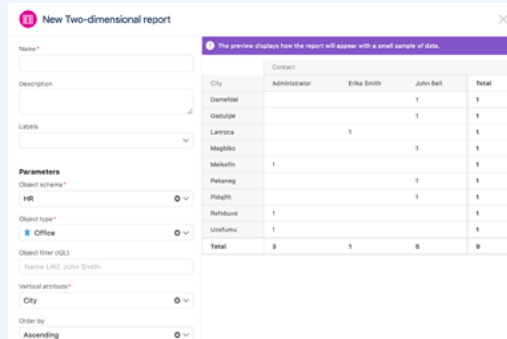
You can use dynamic reports to view information about assets in **Assets** in Jira Service Management object schemas (asset-based reports) or Jira issues with asset custom fields (issue-based reports). For example, you can use asset-based reports to monitor the health of your asset/CI data and assess the accuracy and completeness of the data. Issue-based reports summarize Jira issues that include asset-related data (e.g., incidents impacting laptop assets).

**Atlassian Analytics** provides asset-based and issue-based reporting capabilities for **Jira Service Management Cloud** users (Enterprise only). Additional issue-based reports are available in the cloud environment through out-of-box Jira Service Management reporting or integrations with analytics tools available through Atlassian Marketplace.

The following asset-based reports are available with **Assets** in Jira Service Management Data Center/Server application. Out-of-box issue-based reporting is also available in Jira Service Management.



Report	Description	Example
Attribute value count report	Pie chart showing how the objects of an object type are distributed based on attributes.	
Attribute value report	Chart showing attributes totals reported for one or more objects of a specific type.	
Catalog report	Catalog of objects and their attributes.	
Issue count report	Line or bar chart showing historical totals of issues reported for one or more object types or objects.	

Report	Description	Example
Map report	World map showing the location of objects based on an attribute with geographical data. The objects must have a text attribute with a comma-separated latitude and longitude, for example -33.8,151.2 (Sydney).	
Object count report	Line chart showing historical totals of objects for one or more object types.	
Payroll report	Chart showing payroll expenditures.	
Two-dimensional report	Returns a table showing the objects of an object type and their attributes.	

Report	Description	Example									
User report	Returns a table showing the total of one or more objects assigned to one or more users.	<thead> <tr> <th>Users</th> <th>Objects</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Administrator</td> <td>1</td> <td>1</td> </tr> <tr> <td>Total</td> <td>1</td> <td>1</td> </tr> </tbody>	Users	Objects	Total	Administrator	1	1	Total	1	1
Users	Objects	Total									
Administrator	1	1									
Total	1	1									

| Object search | Report is based on a saved quick search (filter) from the [Assets Object Search View](#). It's a table showing the objects of an object type and their attributes. When you open an object search report, you can select the Quick search link to view the filter that generates the table. | | Key | Office | Object Type | City | Employment | | --- | --- | --- | --- | --- | | HR-2371 |  | Employee | Jakarta | 04 Jun 2019 | | HR-2572 |  | Employee | Colima |  | | HR-2573 |  | Employee | Winnipeg |  | | HR-2574 |  | Employee | Moscow |  | | HR-2575 |  | Employee | Elmford |  | | HR-2576 |  | Employee | Buenos Aires |  | | HR-2577 |  | Employee | Managua |  | | HR-2578 |  | Employee | Ankara |  | | HR-2579 |  | Employee | Pidmoo |  | | HR-2580 |  | Employee | Onizuk |  | | HR-2581 |  | Employee | Tafel |  | | HR-2582 |  | Employee | Tamara |  | | HR-2583 |  | Employee | Polaris |  | |

### PRO TIP

If you use **Assets** in Jira Service Management and include all of its data in an **Atlassian Data Lake** connection (along with Atlassian Analytics), you can utilize the starter dashboard that comes with that Data Lake connection; see the link for details:

[Starter dashboards for asset and configuration management](#)

## Automation

You can drive efficiency with automated actions that follow conditional rules. Rules allow you to automate actions within your system based on criteria that you set. Automation rules are made up of three parts:

- Triggers that kick off the rule
- Conditions that refine the rule
- Actions that perform tasks in your site

You can create automation rules that automatically perform actions (for example, notify users) based on specific events (for example, object updates) for all objects, or only a group of objects in a schema. When an asset meets certain criteria, you can update an asset, create issues, send email notifications and execute a script or an HTTP request.

The following Jira automation components are available for **Assets**:

- Create issue (If the rule is triggered by an object, you can select Insert object to automatically add the triggered object via AQL)
- Edit field attributes
- Edit object
- Lookup objects

Rules can be tailored to your needs using the Asset Query Language (AQL). Use post functions to trigger automatic actions that follow Jira workflows. For instance, automatically assign the issue to a service owner upon confirmation. Leverage powerful automation tools to further slash down resolution time and boost operational efficiency.

For more information, visit the following links:

[Use Assets Query Language \(AQL\)](#)

[Jira Software Automation: Basics](#)

[Jira automation actions](#)

## Assets Discovery

**Assets** Discovery is a network scanning tool that can be used with or without an agent. It detects hardware and software that is connected to your local network, and extracts detailed information about each asset. This data can then be imported into **Assets** to help you manage all of the devices and CIs within your local network. You can choose which assets, and which attributes, you pull into your object schemas and you can create your own scanning patterns to find more specific details. If you run it on a schedule, it will pick up changes to keep data updated. With automation rules, you can even trigger Jira issues, email notifications, and more based on detected changes!

**Assets** Discovery is free of charge and includes three separate tools:

- **Assets** Discovery is an agent-less scanner to help you discover devices and CIs in your local network.
- **Assets** Discovery Agent is an agent-based scanner that can help you discover data from systems that are not always online, or collect data from Windows systems without opening the inbound WMI Port and the Dynamic DCOM Ports.
- **Assets** Discovery Collector is a tool that allows you to run multiple instances of Discovery in parallel, or to run a scan remotely and transfer the resulting data to a different location.

For more information  
visit the following link:

[What is Assets Discovery?](#)

## Integrations and data imports

Ensure your Jira Service Management system can scale with a single source of truth that always provides an accurate, real-time picture of your infrastructure.

- Leverage a wide range of free integrations to sync with industry-leading cloud services, asset managers, and other CMDB tools and applications
- Complete data imports in a variety of formats

Integrations and import functions allow you to connect all the dots and work with up-to-date information that grows with your business. **Assets** provides a solution to federate an array of data repositories and link together all the data about an IT resource.

**Assets** has several built-in importers that let you import your data from CSV, database, JSON, LDAP, and so on. You'll use these importers by creating an import configuration, specifying its details, and then mapping the data you're importing to object types and attributes. Such an import configuration can be then synced on a regular basis, so your assets stay up to date.

For more information  
visit the following link:

[What are imports?](#)

Additionally, **Assets** integrate with industry-leading tools such as AWS, Google Cloud, Azure, Jamf, and SCCM. You can also migrate from and connect with third-party applications like ServiceNow, Device42, Snow, and NVD.

While we have all these tools, we don't recommend you bring in every bit of data you have into **Assets** unless you plan to depreciate the tool. Bring in what you need to use in Jira Service Management; you can always bring in more later.

## Jira Service Management plans and **Assets** functionality

**Assets** in Jira Service Management is built on the Jira Service Management platform, so teams can quickly and easily tie assets/CIs to service requests, incidents, problems, changes, and workloads.

Unlike legacy CMDB applications, **Assets'** flexible and open data structure allows teams to manage any kind of asset that's important to support their ITSM practices. HR, sales, marketing, legal, facilities, and other functions can also use **Assets** to track and manage their assets and resources.

**Assets** in Jira Service Management is a Premium and Enterprise only feature. It is compatible only with company-managed projects.



Feature	Assets in Jira Service Management Data Center (v 4.15 and later)	Assets in Jira Service Management Cloud Premium or Enterprise
<b>Objects and object modeling</b>		
<b>Object schemas</b> Use object schemas to organize the structure of your object types, objects, and attributes.	✓	✓
<b>Object schema templates</b> Create an object schema from a template that contains pre-created object types and objects.	✓	✓
<b>Object types</b> Use object types to specify assets/CIs by defining attributes and references between other object types.	✓	✓
<b>Objects</b> A specific instance of an object type. E.g. 'Laptop' would be an object type and 'MacBook-4523' would be an object.	✓	✓
<b>Number of objects</b>	Unlimited Subject to the performance parameters you set for your Jira Service Management environment	*Premium - 1 million *Enterprise - 1 million
<b>Attributes</b> Use attributes to manage what kind of information is stored for each object type.	✓	✓
<b>References</b> Use references to define how objects are related to one another.	✓	✓
<b>User Roles</b> Use roles to manage object schema permissions for different users and groups.	✓	✓

## Data, Importing, & Exporting

### Assets Custom Field

Select objects from fields in Jira issues.



Via **Assets**  
custom fields



Via **Assets**  
custom fields

### Imports - CSV

Bring data into **Assets** from CSV and JSON files.



Normalization for  
duplicate entries



Normalization for  
duplicate entries

### Imports - JSON

CSV Bring data into **Assets** from CSV and JSON files.



Normalization for  
duplicate entries



Normalization for  
duplicate entries

### Imports – Databases, LDAP, and Jira Users

Bring data into **Assets** from external databases, Active Directory, or from the Jira environment itself.



Some integrations are available today via Atlassian Marketplace. This is a priority area for future development.

### Asset Discovery

Network scanner that can be used to discover IP-enabled assets/CIs and bring them into Jira Service Management.



### Integrations

Integrate with a third party tools to keep data up to date. Includes:

- Cloud providers (AWS, Azure, Google Cloud)
- Mobile device and software management (JAMF, SCCM, Snow)
- Other CMDBs (ServiceNow, Device42)
- Atlassian ecosystem (Jira & Bitbucket, Confluence, Tempo)
- Others (NVD)



Some integrations are available today via Atlassian Marketplace. This is a priority area for future development.

### Export objects

Export data from **Assets** as a backup or to be used in other systems.



## Reporting, viewing, & searching

### Object graph

Use the object graph to view the relationship and hierarchy between different objects and object types.



### AQL search

Use AQL (Assets Query language) to search **Assets** for specific objects (e.g. what computers are not assigned to a user).

Note: this was previously IQL (Insight Query Language) and will continue to function following the rebrand to **Assets**.



### JQL search

Use the **Assets** JQL function to search for Jira issues that have objects linked to them.



### Bulk edit objects

Make changes to a large number of objects at once.



### Reports

View your **Assets** information in myriad different ways.



Via Atlassian Analytics  
(Enterprise only)  
Via integration with analytics  
tool available from Atlassian  
Marketplace

### Widgets

Use an **Assets** widget to view **Assets** information within a Jira Dashboard or on a Confluence page.



Via Confluence Macro

### Print QR Codes

Generate printable QR codes for each object in **Assets**.



### Label templates

Generate printable, customizable label templates for each object in **Assets**.



## Automation

### Workflow Transitions

Automate **Assets** related tasks when a particular transition in a workflow is triggered.



Uses **Assets** specific post-functions



Uses Jira Automations rather than post-functions. Similar functionality to Data Center.

### Object Automations

Create rules that automate simple tasks in **Assets**. Rules are automatically triggered upon certain events.



Uses **Assets** specific automations



Uses Jira Automations rather than **Assets** specific automations. Similar functionality to Data Center.

## Extending Assets functionality

### Scripting

Ability to extend automation actions with Groovy scripting.



Uses **Assets** specific automations

Can use Jira Automations or **ScriptRunner** instead

### REST API



# 03

---

Good practices for IT asset and service  
configuration management

# Why use *Assets* in Jira Service Management?

Digital transformation of businesses, a top tech initiative, changes how we look at the management of IT assets – including information and lifecycle– from on-premises hardware and software to SaaS apps and services in the cloud. Technology management as a whole requires clear visibility into the entire IT landscape, and that all starts with offloading the baggage of historically troublesome terminology, like CMDB – a term that often conjures feelings of inaccuracy and untrustworthiness. As [Gartner](#) previously documented, only 25 percent of organizations derive value from their current CMDB investment.<sup>3</sup>

However, CMDBs can provide valuable insights and enable IT to make better decisions more quickly for service delivery. Recent Forrester research indicated that:

“ A CMDB is an integrated operational data store that contains key IT/digital assets, inventories, and their dependencies. It can play an essential role in enabling impact analysis and managing IT portfolios for risk, efficiency, and performance. In our survey, 67% of respondents said their organization has a CMDB; of those, 91% agreed that their CMDB is essential to their operations.

GARTNER, INC. “BREAK THE CMDB FAILURE CYCLE WITH A SERVICE ASSET AND CONFIGURATION MANAGEMENT PROGRAM.” PUBLISHED 5 MAY 2020.

Forrester further hypothesizes that:

“ ... organizations investing in this capability have a better understanding of their digital estate, leading to higher performance on multiple dimensions. Notably, high-performing organizations overcome the data quality and completeness concerns that have plagued CMDBs and led to their failure; respondents in these groups are also more likely to report that they have automated their CMDB data maintenance as much as possible.

FORRESTER RESEARCH, INC. “THE STATE OF SERVICE MANAGEMENT, 2022.” PUBLISHED 22 JULY 2022.

To achieve successful technology management in the current era, it is crucial to identify and align key objectives and let go of outdated perceptions about CMDBs, assets, and IT inventory. So how can an organization reassess its current and future landscape? By looking at what’s needed – providing the right data to the right stakeholders at the right time.

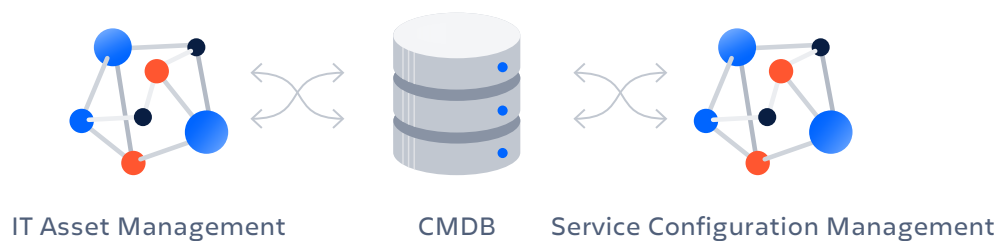
<sup>3</sup> Gartner, Inc. “Break the CMDB Failure Cycle With a Service Asset and Configuration Management Program.” Published 5 May 2020.

**Assets** in Jira Service Management provides a modern-world database for asset and service configuration management that is extensible throughout the business environment.

When say "modern" world, we are referring to a technology landscape that is agile, hybrid, and constantly evolving. This landscape is shaped by emerging DevOps practices, facilitated by SaaS products, and hosted on a combination of mobile and on-premise devices and cloud platforms.

**Assets** was built with this complex, transforming landscape in mind and has a few advantages over other vendors' offerings:

- **Tool Structure** – By standardizing on a single tool across both asset and service configuration management, users benefit from tighter process integration and gain richer information context through shared data elements. Customers can also realize cost savings through faster implementation and simpler maintenance of a single tool.



- **Flexibility** – Our open data structure provides customers with more control over their assets and CI types. Customers can track asset and CI data required to support key business processes which reduces implementation time and maintenance effort.
- **Accuracy** – No-code/low-code automation keeps data updated and reduces the manual workflow significantly.
- **Centralization** – A wide range of integrations so customers can use a single entry point to their data. The source copy of the data is stored elsewhere. (Note: Due to the number of integrations available, this currently applies more to Jira Service Management Data Center than to Cloud.)
- **Reputation** – With Jira Software’s reputation with software developers, we have an opportunity to improve the reputation of CMDBs from a “barrier” to an “enabler” within the DevOps world.

# How do I get started with **Assets** in Jira Service Management?

**Assets'** tool structure allows teams to adopt an adaptable and scalable strategy for building their IT asset and service configuration management system.

Use the ITIL 4 Guiding Principles to observe and understand the services, practices, people, and tools that you already have.

Consider the following ITIL 4 principles:

- Start where you are
- Focus on value
- Progress iteratively with feedback
- Keep it simple and practical
- Optimize and automate
- Collaborate and promote visibility
- Think and work holistically

While none of us like “homework,” it is required for a successful asset and service configuration management implementation. Most customers conduct a series of workshops to outline the company’s key business initiatives and establish clear goals for their asset and service configuration implementation. The following sections include activities for successfully implementing **Assets**.





# Activity 1

## List objectives and measurable outcomes that support business goals and strategies

Start by identifying a team and constructing a playbook. The team should include members of various groups – development, IT operations, and business (legal, finance, etc.) – to ensure that the organization's goals are articulated and priorities are defined.

The team's playbook should outline the business value of IT asset and service configuration management using the following items:

- Stakeholders (Who)
- Scope of the work (What)
  - Approach, constraints, and assumptions (How)
  - Expected business outcomes (Why)
  - Success measurements (Evaluate)

For example:

### Who

- Service desk
- DevOps
- SecOps
- Enterprise architecture

### What

- Implement a system to manage IT assets and service configurations

## How

- Provides support for cloud computing and a cloud-driven demand model
- Provides improved data availability to IT Information Security
- Enhances change collision detection/proactive change management impact analysis
- Provides additional data for incident management, problem management, and event management
- Facilitates improved collaboration and cooperation across the organization

Provides data to support contracts with external service providers

## Why

- Improve overall system availability
- Be better positioned to support audits/regulatory requirements
- Contribute to a cohesive strategy across IT organizations
- Provide a Single Source of Truth describing how the IT infrastructure supports the business
- Provide better insight into IT operational environments

## Evaluated by

- Improved visibility of planned and unplanned changes as a percentage of total changes
- Increased successful change rate
- Decreased incident mean-time-to-repair
- Improved perception of IT as an enabler of the business

## Activity 2

### Develop a top-down, lean approach to designing your service model architecture

Here are some common questions a company might ask about where to start and what info to include in the team's playbook. Which questions come up most for you? Which answers take the longest to find out? What answers cost your organization the most if you don't have them?

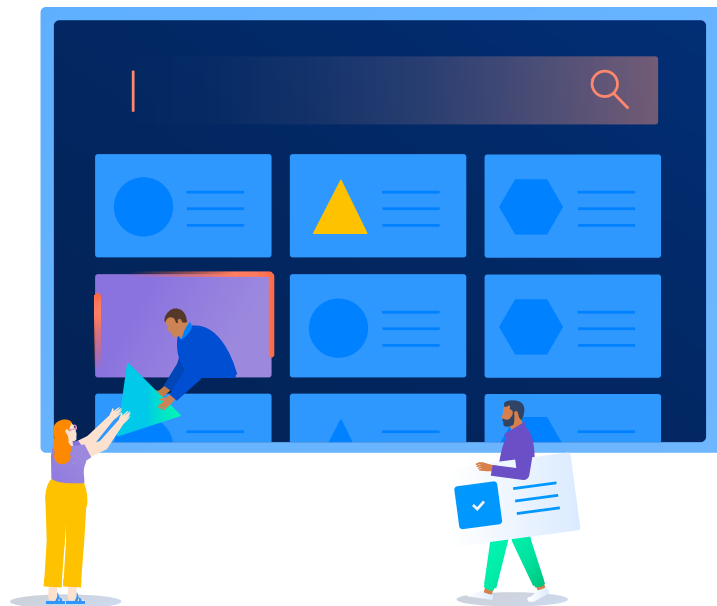
IT asset management	Service configuration management
<ul style="list-style-type: none"><li>• What type of IT devices are important for us to track and manage?</li><li>• What do we need to understand about our IT devices to track them effectively?</li><li>• What do we need to track when onboarding and offboarding employees and contractors?</li><li>• What types of software licenses do we track (cloud vs physical)? Do we have a good understanding of the subscription license purchased versus assigned?</li><li>• How can leadership and IT teams find the total assets deployed, who owns or is assigned the assets, where is the asset's associated purchase order and contract data, etc. to make key business decisions?</li><li>• What types of information do we need to track to support financial audit requirements?</li></ul>	<ul style="list-style-type: none"><li>• What are the top services that are important to our business?</li><li>• Who manages these services?</li><li>• What percentage of services are deployed to the cloud (AWS, Azure, Google etc.)?</li><li>• Do we have a good understanding of the service taxonomy (the supporting service applications/infrastructure and their relationships)?</li><li>• What types of information do we need to track to support compliance requirements?</li></ul>

If you can't easily answer these questions, then you likely have blindspots in your asset and service configuration oversight. If you have unused licenses, maybe you're paying too much for your software agreement. If you're not sure which operating systems you have running, how do you make sure every device is updated if there's a security patch required?

Our recommendation is to keep your approach simple and practical by focusing on your most critical services and systems. These are easy to spot – if there is even a hint of a disruption, your service desk is flooded with calls and senior management starts sending nervous messages to their staff. List out central problems and questions for these capabilities in the team’s playbook.

This information will determine what data you need to answer your questions and help solve your problems and are the foundation for your initial use cases to be included in the team’s playbook. Identify your critical service and the supporting infrastructure, specifically, the applications and the related servers.

You can then prioritize developing these use cases based on the value the functionality will bring to the business and ease of implementation. You’ll get a quicker and more visual realization of the available benefits, and the rest of the business will quickly notice the positives, such as quicker incident resolution, fewer failed changes, and less downtime.



## Activity 3

### Identify data, workflow, and roles that support key business processes

After your initial use cases are defined, the next action is to consider what data asset and service configuration management must provide to other processes (incident, change, request fulfillment, etc.).

For example, what data is needed to repair an employee's laptop?

- Asset tag
- Model
- PO
- Assigned user
- Location

This data will be the attributes for your assets/CIs. Include only the attributes you need to support the data needs of the use cases and determine the source for the information. Some customers may have configuration data available through current discovery tools and other asset data tracked in various spreadsheets or databases across separate organizations. Use your existing data as the baseline for Assets implementation and document which attributes require manual entry and which ones can be updated automatically via discovery.

Also, outline the workflows and roles between processes so that everyone knows how they should be working with each other and who owns the data completeness and accuracy.

For example, incidents can be created only for servers that are connected to the company network and operational. The data center team is responsible for receiving the server and updating asset data, the server support team installs the server, and a discovery tool detects the new server and sets the configuration status to operational.

## Activity 4

### Outline your asset/configuration dataset

In our experience, companies typically start with tracking infrastructure assets they need to support incident and change management as well as service requests. These items typically represent IT components such as:

- Servers and virtual machines
- Applications
- Laptops/desktops
- Printers
- Network equipment
- Storage arrays
- Databases
- Security appliances
- Microservices

Decide which asset types and attributes you need to support your use cases. Again, we recommend that organizations start simple and make incremental improvements as they gain experience.

#### PRO TIP

- Start by populating **Assets** with a solid inventory of assets and CIs focused on specific use cases. If you find yourself populating with items that do not tie back to your goal or use case, you are off track.
- Assets/CIs should have unique identifiers that do not change. The identifier needs to be unique so it can be differentiated from other assets/CIs, and it mustn't change so the asset/CI can be tracked over time. We recommend establishing a consistent naming convention to improve usability of asset data. Serial number, asset tag, asset name or external system identifier can be used depending on the asset type.
- Assets/CIs should have relationships. An infrastructure asset/CI represents a component that needs to be managed to deliver or support a service. In other words, each infrastructure asset/CI has a direct or indirect relationship with one or more service CIs.

## Activity 5

### Develop metrics that demonstrate improvement in key business outcomes

You can show value to the organization by tying back to the goals and objectives the team set earlier. The value to the company is that you can provide a link between strategic business drivers to the services offered to your customers to the operational infrastructure used to deliver your services and the associated total cost of your services.

For example, Assets can help your IT organization track:

- Improved mean time to identification (MTTI) and mean time to resolution (MTTR) for incidents by using CI dependency information
- Reduced device misconfigurations which can contribute to system
- downtime and cyberattack vulnerability
- Increased service availability and change deployment success through more visibility of system relationships and improved risk assessments
- Improved asset utilization and budgeting accuracy with a single source of asset lifecycle data and the associated costs
- Faster system isolation and remediation after security incident with accurate infrastructure dependency data
- Increase regulatory compliance through streamlined IT asset and CI tracking procedures and improved data quality and reporting

These metrics provide a more data-driven approach to new software and hardware investment for the organization.

# How do I build assets using **Assets** in Jira Service Management?

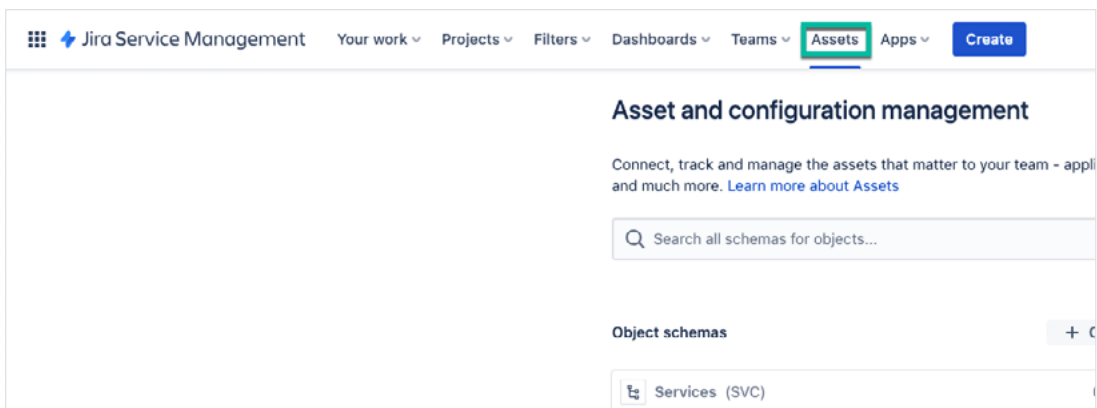
**Assets** is included in Jira Service Management Premium, Enterprise, and Data Center plans, allowing teams to track their assets, CIs, and resources to gain visibility into critical relationships between services, infrastructure, and other key assets. **Assets** is built on Jira Service Management, giving teams a simple and quick way to tie assets and CIs to service requests, incidents, problems, changes, and other issues to gain valuable context and the ability to automate workflow to boost operational efficiency.

The following link provides more information about Jira Service Management Cloud Premium and provides an option to start a free trial.

[Jira Service Management Cloud Premium](#)

## Accessing **Assets** in Jira Service Management

Whether you are on a licensed or trial version of Jira Service Management Premium or Enterprise, you can access **Assets** in Jira Service Management by clicking on the **Assets** option in the Jira Service Management main navigation bar.



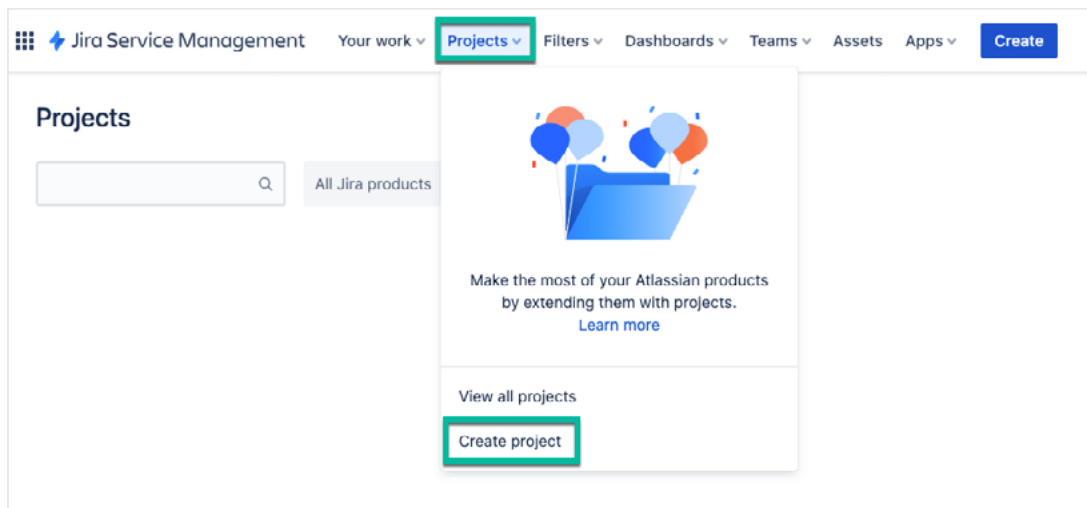


## PRO TIP

If you are new to Jira Service Management, we recommend you create a project using the IT service management template. In a new instance, this template creates two projects:

- ITSM sample space (ITSAMPLE) to test, explore, and learn how ITSM projects work by creating new requests, adding custom fields, and assigning them to people – or play around with the sample requests we’ve created for you.
- The project you define to handle service requests, resolve incidents, approve changes, and fix problems.

Whether you use a default project or create a new project, note the project’s Key data because we will use the information later when creating a custom field.



Jira Service Management has a variety of project templates to help teams get set up quickly by creating projects tailored to a specific team or use. These templates include pre-configured request types, workflows, and other features relevant to their type. To learn more about service project templates, visit this link:

### What are the project templates?

The screenshot shows the 'Project templates' page in Jira. On the left is a sidebar with categories: Service management (highlighted), Marketing, Human resources, Finance, Design, Personal, Operations, Legal, and Sales. The main content area is titled 'Service management' and includes a description: 'Empower every team, from IT to HR to marketing, as they collect, prioritize, assign, and track incoming requests with ease. Get up and running quickly by selecting one of our tailored templates that k settings based on service management best practices.' Below this are two template cards. The first card, 'IT service management', is marked 'RECOMMENDED' and describes handling service requests, resolving incidents, and approving changes. The second card, 'Blank project for IT teams', is marked 'NEW' and describes creating an ITSM project with minimal pre-configured settings. Both cards have a right-pointing arrow.

The screenshot shows the 'IT service management' template details page. At the top is a blue header with the title 'IT service management' and a 'Use template' button with a close icon. The main content area has a light blue background. On the left, there's a description: 'Designed specifically for IT teams, this template facilitates high-velocity service management. Containing powerful ITSM categories with dedicated features, it can help you resolve incidents, approve changes, and fix problems fast.' Below this are three sections with icons and text: 'Resolve incidents faster' (with an icon of a person and a warning sign), 'Track and approve changes' (with an icon of a document and a checkmark), and 'Fulfill service requests quickly' (with an icon of a person and a checkmark). Each section has a 'Learn more about...' link. On the right, there's a sidebar with sections: 'PRODUCT' (Jira Service Management), 'RECOMMENDED FOR' (IT teams, DevOps), 'Any team looking for a powerful service management solution with incident and change management capabilities', 'SERVICE REQUEST TYPES' (a list of request types), and 'INCIDENT REQUEST TYPES'. At the bottom right is a 'Use template' button.

On the **Create project** page, enter **ITSM Project** in the **Name** field and select **Information Technology (IT)** in the **Team Type** field.

The **Key** field will automatically populate based on the project name; however, you can update the data if you would like. Whether you use a default project or create a new project, note the project's **Key** data because we will use the information later when creating a custom field.

The screenshot shows the 'Create project' form with several fields and a template section. A large blue arrow points from the 'Team type' dropdown to a callout box on the right. The callout box shows a list of projects with columns for color, key, and name. The 'Team type' dropdown is highlighted with a green box and contains the text 'Information technology (IT)'. The 'Create project' button at the bottom is also highlighted with a green box. The 'Key' field contains the text 'IP'. The 'Channel access' dropdown is set to 'Open'. The 'Template' section shows a card for 'IT service management' with a Jira Service Management icon and a description: 'Handle service requests, resolve incidents, approve changes and fix problems using ITSM best practices.' A link 'More templates' is visible next to the template card. A link '> Show more' is located below the template section.

**Create project**

Add your project's details and confirm your template to create your new project in seconds.

\*Indicates a required field.

Name \*

ITSM project

Key \*

IP

Team type \*

Information technology (IT)

This will help us customize your project creation experience.

Channel access \*

Open

Control who can submit requests to your team. You can change this later.

Template

More templates

IT service management  
Jira Service Management  
Handle service requests, resolve incidents, approve changes and fix problems using ITSM best practices.

> Show more

Create project

Jira Service Management

Your work

Projects

Filters

Dashboards

Teams

Assets

Your work

Recent projects

ITSM sample space

Service management

RECENT QUEUES

All open tickets0

All my tickets0

3 queues

ITSM Project

Service management

RECENT QUEUES

All open tickets0

All my tickets0

3 queues

Worked on

Viewed

Assigned to me0

Starred

Your project is now available, and you are ready to start creating assets, CIs, and other important data for your organization.

For more information about getting started with Jira Service Management, visit the following link:

[How to Use Jira Service Management | Atlassian](#)

PART 3: GOOD PRACTICES FOR IT ASSET AND SERVICE CONFIGURATION MANAGEMENT

64

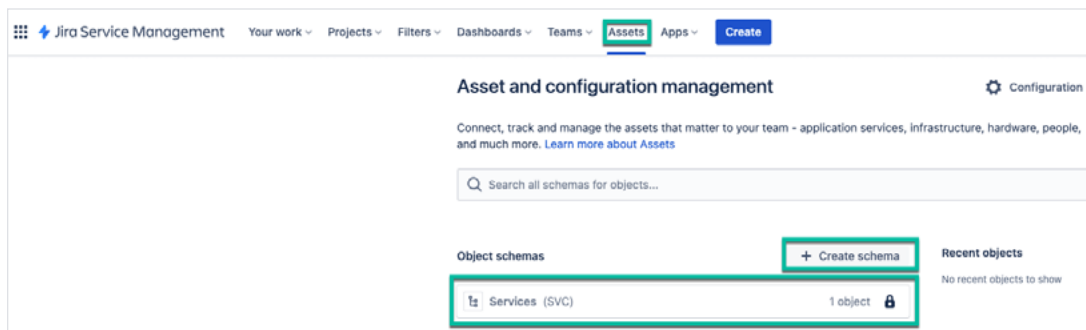
# Use Case - Tracking a Jira request for an employee laptop

Managing laptops is a common use case for almost every organization. We will provide a step-by-step guide for tracking laptop requests in Jira Service Management to explain the features and capabilities of **Assets** better.

## Step 1 – Create an object schema for Facilities

We will include facility data in employee records, so we must create a Facilities object schema first, so information can be referenced by the Employees object schema we create next. We will also create nested object types for floors and rooms and display the information in a flexible tree hierarchy.

If your organization does not need to track multiple buildings or facility data, skip to Step 5.



Note: There is a default, read-only object schema named “**Services.**” This object schema is system-generated and tracks services created in Jira Service Management. By setting up services and using them in your day-to-day processes, you can measure their success, track changes, reduce the risk of cascading problems, ensure the service responders and stakeholders are notified of the incidents, increase the quality and speed of your operations, and keep records.

Service

Objects

Back to list view

SVC-1

Demo Service

Details

Activity

Inline editing is not available

Select Edit to modify the attributes of this Service.

Edit

Name

Demo Service

Description

This is a system generated service that creates the demo requests for the IT service management template product tours

Tier

Tier 4

Service relationships

None selected

Service ID

aricloud:graph:service:0dd775f-d4a7-4822-9281-9a403e18f6da/19e2ac4-1cb6-11ed-9d56-128b42819424

Revision

900308862

Project

No projects selected

Bitbucket Repo

No Bitbucket repositories selected

Stakeholders

No users selected

Responders

No users selected

Service Owners

No Opsgenie Team selected

Linked objects

Object graph

No inbound or outbound references

Linked issues

Filter: Active

No issues found

Attachments

No attachments

Created August 17, 2022, 5:14 PM

Modified September 1, 2023, 7:02 AM

The **Demo Service** object is a system-generated service that creates the demo requests for the IT service management template product tours.

PART 3: GOOD PRACTICES FOR IT ASSET AND SERVICE CONFIGURATION MANAGEMENT

66

## ASSETS SCHEMA TEMPLATES

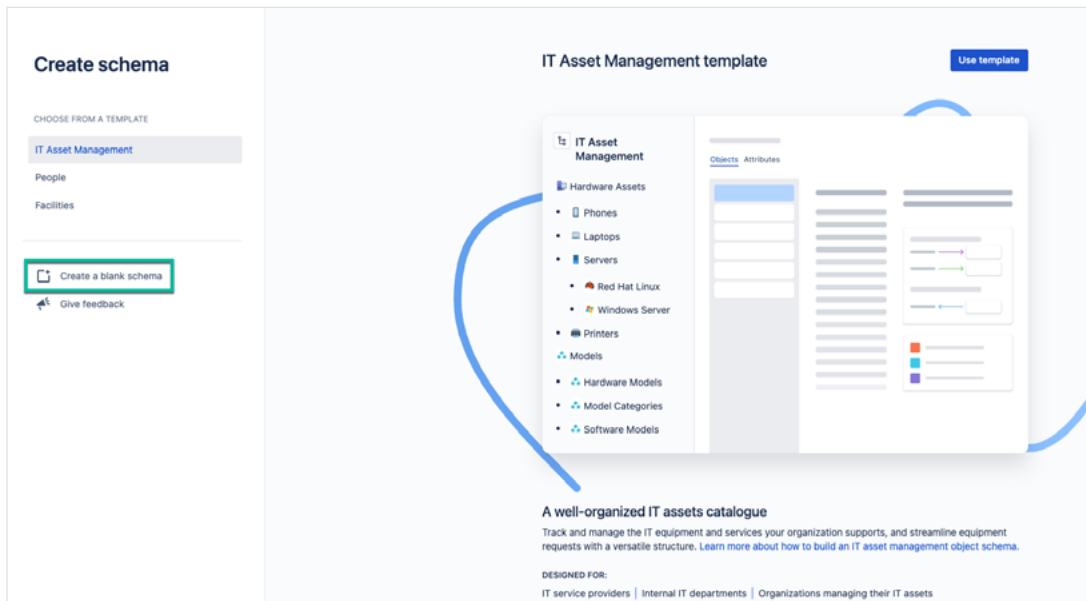
If you want to skip the data structure building steps, you can use **Assets** object schema templates to generate object schemas that support your organization's resource tracking. These templates contain a variety of object types based on your needs, giving you a head start as you build out an effective data repository.

To learn more about **Assets** schema templates, visit the following link:

[Object schema templates](#)

The screenshot displays the 'Create schema' interface. On the left, under 'CHOOSE FROM A TEMPLATE', three options are listed: 'IT Asset Management' (highlighted with a green border), 'People', and 'Facilities'. Below these are links for 'Create a blank schema' and 'Give feedback'. On the right, the 'IT Asset Management template' is previewed. It features a 'Use template' button in the top right corner. The preview shows a hierarchical tree of assets: 'IT Asset Management' (root) -> 'Hardware Assets' -> 'Phones', 'Laptops', 'Servers', 'Printers', 'Models' -> 'Red Hat Linux', 'Windows Server', 'Hardware Models', 'Model Categories', 'Software Models'. To the right of the tree is a table with columns 'Objects' and 'Attributes'. Below the preview, the text reads: 'A well-organized IT assets catalogue. Track and manage the IT equipment and services your organization supports, and streamline equipment requests with a versatile structure. Learn more about how to build an IT asset management object schema.' At the bottom, it states 'DESIGNED FOR: IT service providers | Internal IT departments | Organizations managing their IT assets'.

Click **+ Create schema** to display the **Create schema** page then select the **Create a blank schema** option.

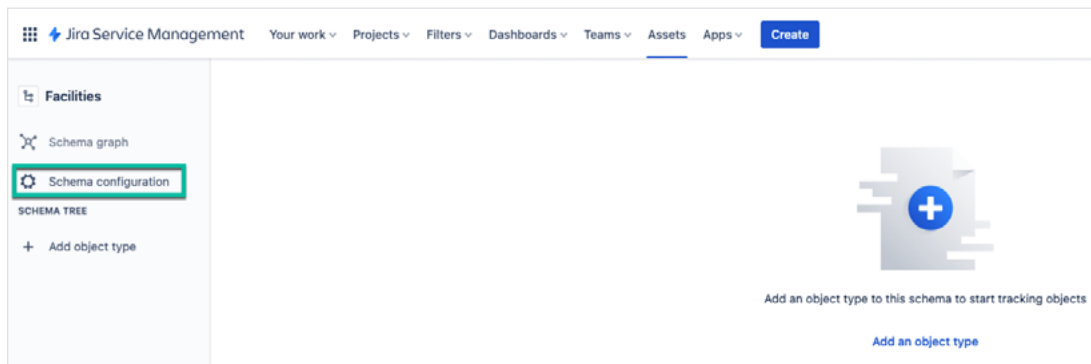


Enter “Facilities” in the *Schema Name* field; the *Key* field will automatically populate based on the project name. Click *Create Schema* to generate the new object schema.

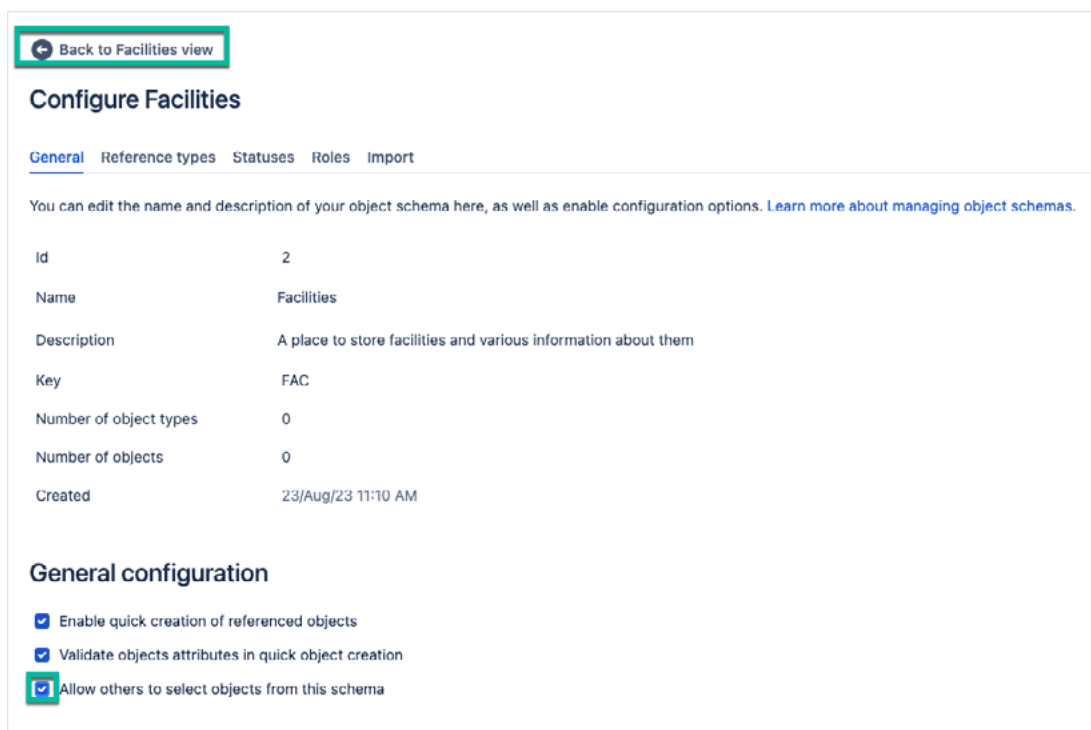
The screenshot shows the 'Add schema details' form. It has a title 'Add schema details' and a note '\* indicates a required field'. The 'Schema name' field is required and contains the text 'Facilities'. Below it, a note says 'You can use letters, numbers and periods.' The 'Key' field is required and contains the text 'FAC'. Below it, a note says 'You can use letters, numbers and periods.' The 'Description' field is optional and contains the text 'A place to store facilities and various information about them'. At the bottom right, there are two buttons: 'Go back' and 'Create schema'. An illustration of people interacting with a large screen is on the right side of the form.



Select the Schema Configuration option to update the new object schema.



Configure the new object schema, and select *Allow others to select objects from this schema* because the facility data should be referenceable by other objects. Then click **Back to Facilities view**.



#### **PRO TIP**

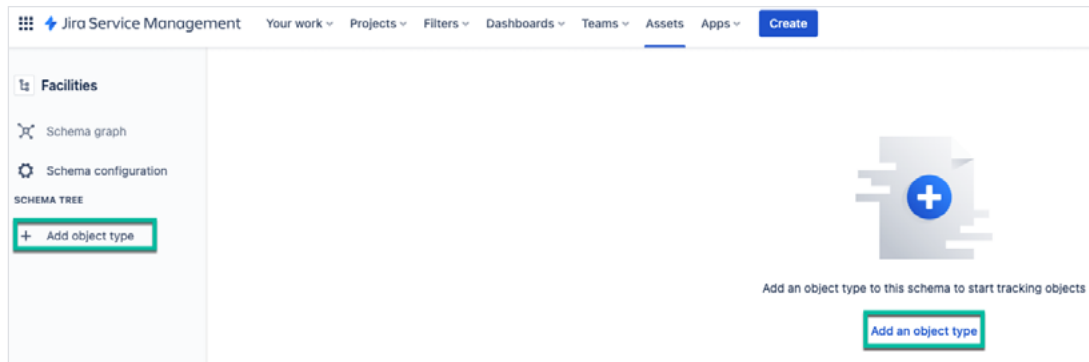
*Enable quick creation of referenced objects and Validate objects attributes in quick object creation are set by default.*

When you are creating a new object, you can enter details about that object in the *Create Object* dialog box. These details could include text or numerical information, or even references to other objects. If you Enable quick creation of referenced objects you can both create and reference an object in one action, simply by entering a new label into any object reference field on the *Create Object* dialog box.

Because these newly created objects may have mandatory fields or validations in place, you can select *Validate object attributes in quick object creation* to enforce any requirements, and block the creation of new objects.

## Step 2 - Create an object type and objects for Buildings

Click the **Add object type** option or link to display the **New Object Type** window, enter the object type information, and create the record.




### New object type

Name \*

Buildings

Max. 50 characters.

Icon \*

 Building

▼

Parent

None

▼

Description

A place to store building information

Max. 70 characters.

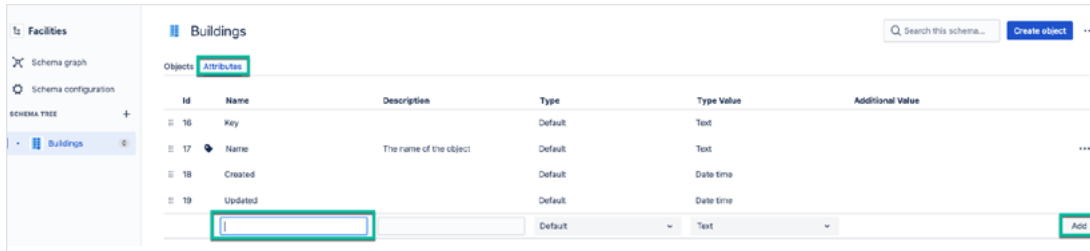
☐ Create another

Cancel

Create

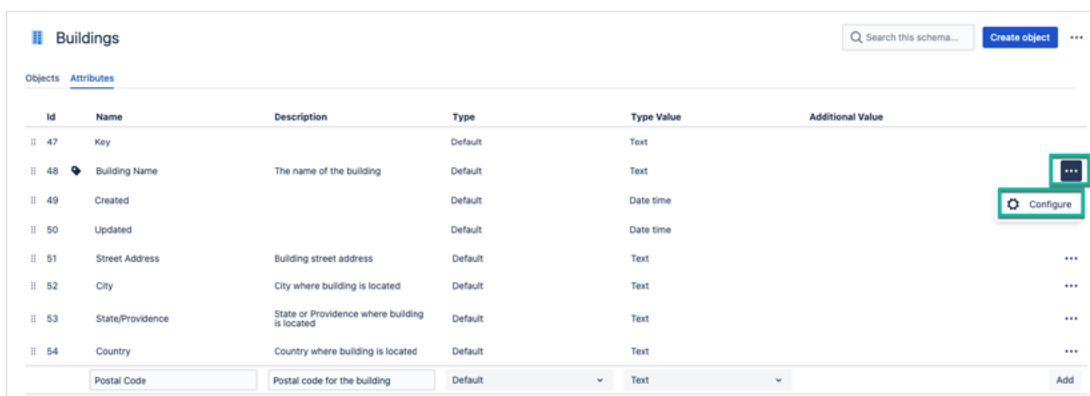
### PRO TIP

Add new icons as you wish and use for object types. This way you can have your organization's colors/theme and improve readability of asset data.



Select the **Attributes** option for **Buildings** object type and add information important to your organization.

Name	Type	Value	Additional Value
Street Address	Default	Text	
City	Default	Text	
State/Province	Default	Text	
Country	Default	Text	
Postal Code	Default	Text	



For the **Name** attribute, select the **Name** field then update the data to “Building Name.” Then click the **ellipsis** icon and select the **Configure** option. Configure the **Building Name** attribute to be unique, so you avoid duplicate building names.

## Configure: Building Name

General Validation



Cancel

Update

### PRO TIP

You can easily reorder attributes by selecting the grid icon and dragging the item to a different location.

Buildings

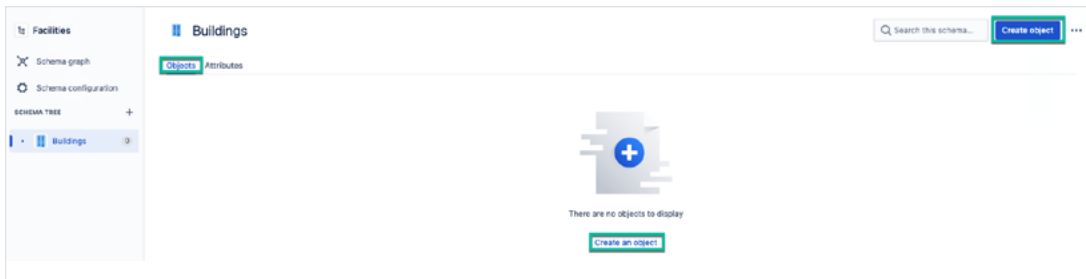
Search this schema... Create object

Objects Attributes					
Id	Name	Description	Type	Type Value	Additional Value
47	Key		Default	Text	
48	Building Name	The name of the building	Default	Text	
49	Created		Default	Date time	
50	Updated		Default	Date time	
51	Street Address	Building street address	Default	Text	
52	City	City where building is located	Default	Text	
53	State/Province	State or Providence where building is located	Default	Text	
54	Country	Country where building is located	Default	Text	
55	Postal Code	Postal code for the building	Default	Text	

Default

Text

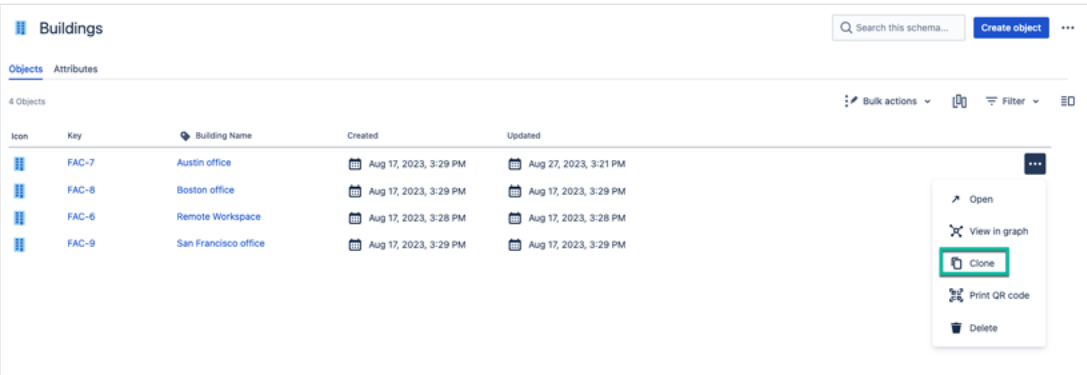
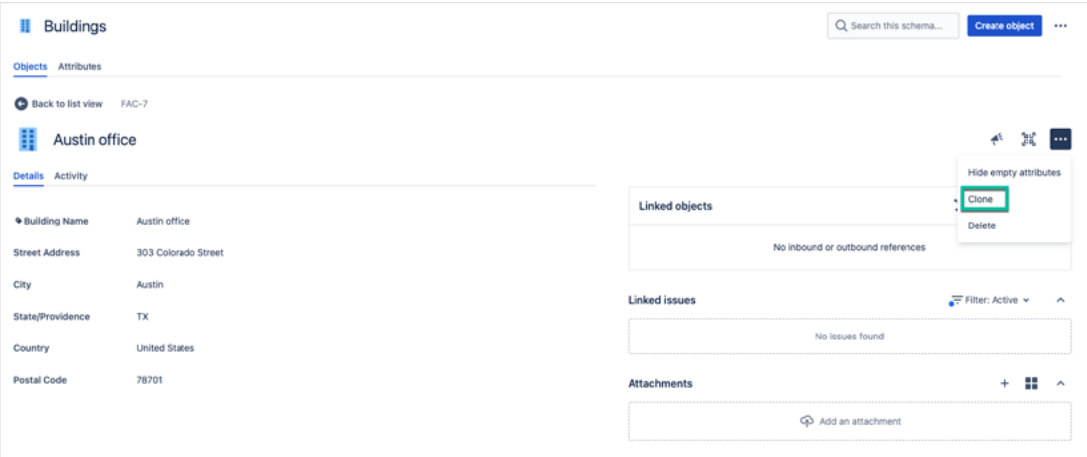
Click the **Create object** button to display the **Create Object** window.



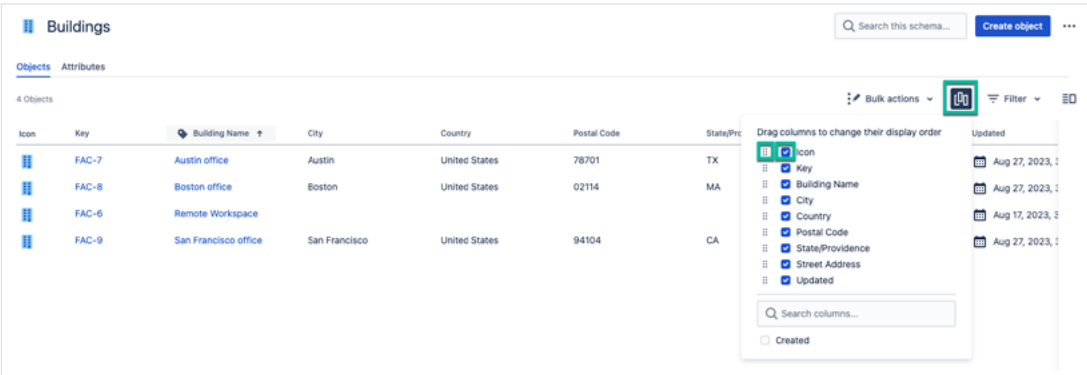
Add building data, select **Create another** to create multiple records using the same window, and create the record.

A screenshot of the 'Create object' window. The title is 'Create object'. Below the title is a section for 'Object Type' with a dropdown menu showing 'Buildings'. Below this is an 'Icon' section with a 'Change icon' button. The main form contains several text input fields: 'Building Name' (filled with 'Austin office'), 'Street Address' (filled with '303 Colorado St'), 'City' (filled with 'Austin'), 'State/Province' (filled with 'TX'), 'Country' (filled with 'United States'), and 'Postal Code' (filled with '78701'). At the bottom of the form, there are three buttons: 'Create another' (with a checked checkbox), 'Cancel', and 'Create'.

You can also use the **Clone** feature to create records.



Note: You can adjust the columns displayed in the **List** view by clicking on the **Columns** option, selecting columns to display/hide, and dragging columns to change their display order.

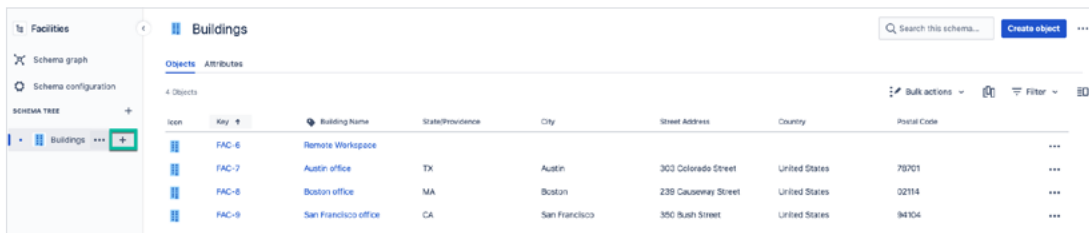


Add your primary building data; additional building records can be created when needed.

## Step 3 - Create Floor and Room object types

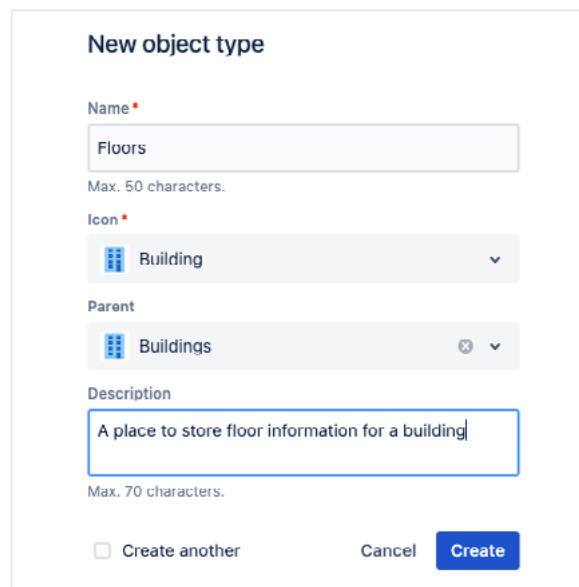
Some companies may need to track facility data at a specific level (e.g., data center stockroom, laboratory room, etc.), so we can create a hierarchical data structure to support this requirement. To create a hierarchical data structure, we create object types with parent object types and include the parent as an attribute.

Create an object type for **Floors** and select **Buildings** as the **Parent**.



The screenshot shows the 'Buildings' object type configuration in the Facilities application. The left sidebar contains 'Facilities', 'Schema graph', and 'Schema configuration'. The main area displays a table of buildings with columns: Icon, Key, Building Name, State/Province, City, Street Address, Country, and Postal Code. There are four objects listed: FAC-6 (Remote Workspace), FAC-7 (Austin office), FAC-8 (Boston office), and FAC-9 (San Francisco office).

Icon	Key	Building Name	State/Province	City	Street Address	Country	Postal Code
	FAC-6	Remote Workspace					
	FAC-7	Austin office	TX	Austin	303 Colorado Street	United States	78701
	FAC-8	Boston office	MA	Boston	238 Causeway Street	United States	02114
	FAC-9	San Francisco office	CA	San Francisco	350 Bush Street	United States	94104



The 'New object type' form is shown with the following fields:

- Name:** Floors (Max. 50 characters)
- Icon:** Building (dropdown menu)
- Parent:** Buildings (dropdown menu)
- Description:** A place to store floor information for a building (Max. 70 characters)

At the bottom, there are checkboxes for 'Create another', 'Cancel', and a 'Create' button.

Select the **Attributes** option for **Floors** object type and add the following information.

Name	Type	Value	Additional Value
Building Name	Object	Buildings	Part of



For the **Name** attribute, update the name data to “Floor Name,” click the **ellipsis** icon, and configure the **Name** attribute to be unique so you avoid duplicate floor names.

Floors

Search this schema... Create object ...

Objects

Attributes

Id	Name	Description	Type	Type Value	Additional Value
138	Key		Default	Text	
139	Floor Name	The name of the building floor	Default	Text	...
140	Created		Default	Date time	
141	Updated		Default	Date time	

Building Name

Name of the associated building

Object

Buildings

Part of

Add

Dependency

Financial

Link

Reference

Technical

Create reference "Part of"

Add parent attributes

For the **Building Name** attribute, you can use an existing value or enter a new reference value; simply click on the item to enter the value. If you enter a new reference value, the data is automatically added to the **Facilities** object schema **Reference types** where you can add more information and update the color.

Back to Facilities view

Configure Facilities

General

Reference types

Statuses

Roles

Import

References connect two different objects. You can create, update, and delete different types of references for the current object schema here. [Learn more about references.](#)

Create a reference

Name	Description	Color	Actions
Part of			

Create an object type for **Rooms** and select **Floors** as the **Parent**.


### New object type

Name \*

Rooms


Max. 50 characters.

Icon \*

 Building

▼

Parent

 Floors

✕ ▼

Description

A place to store floor information

Max. 70 characters.


☐ Create another

Cancel

Create

Select the **Attributes** option for **Rooms** object type and add the following information.

Name	Type	Value	Additional Value
Floor Name	Object	Floors	Part of

 Rooms

Q Search this schema... Create object

Objects Attributes

	Id	Name	Description	Type	Type Value	Additional Value
	143	Key		Default	Text	
	144	Name	The name of the object	Default	Text	
	145	Created		Default	Date time	
	146	Updated		Default	Date time	

Floor Name

Name of associated floor

Object

Floors

Part of

Add

For the **Name** attribute, update the name data to “Room Name,” click the **ellipsis** icon and configure the **Name** attribute to be unique, so you avoid duplicate room names.

Click the **Schema Graph** option to display the object types and their relationships. As you can see in the relationship arrows, **Rooms** are part of **Floors**, and **Floors** are part of **Buildings**.

Facilities

Schema graph

Schema configuration

SCHEMA TREE

Buildings

Floors

Rooms

Rooms

Objects

Attributes

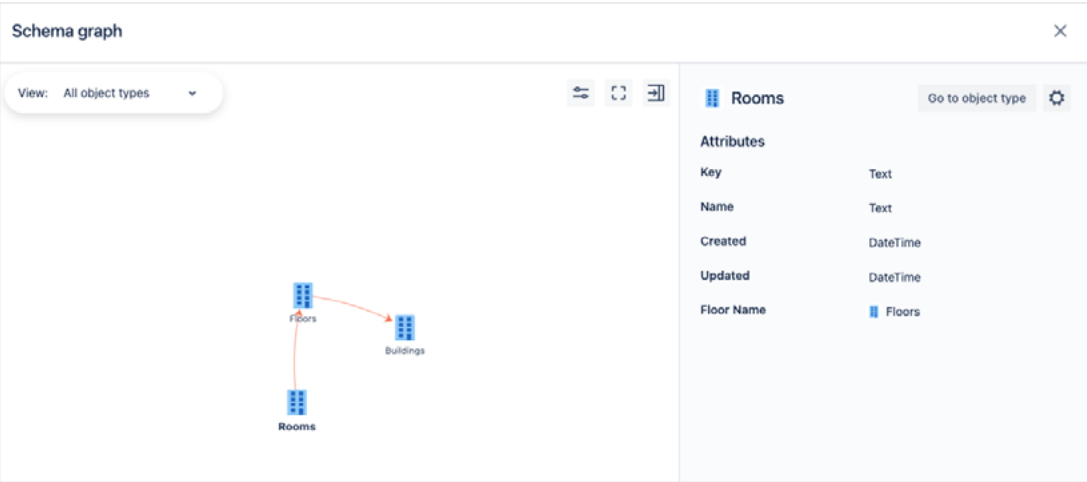
ID	Name	Description	Type	Type Value	Additional Value
143	Key		Default	Text	
144	Name	The name of the object	Default	Text	
145	Created		Default	Date time	
146	Updated		Default	Date time	
147	Floor Name	Name of associated floor	Object	Floors	Part of

Default

Text

Add

Add parent attributes



## Step 4 - Create Temporary Locations object type

Some companies set up temporary operations in parking lots or partner facilities for special events. This data can be added as an object type along with any needed information.


### New object type

Name \*

Temporary Locations

Max. 50 characters.

Icon \*

 Cardboard Box

▼

Parent

None

▼

Description

A place to temporary location information

Max. 70 characters.

☐ Create another

Cancel

Create

Facilities

Schema graph

Schema configuration

Schema tree

Buildings

Floors

Rooms

Temporary LOC...

Temporary Locations

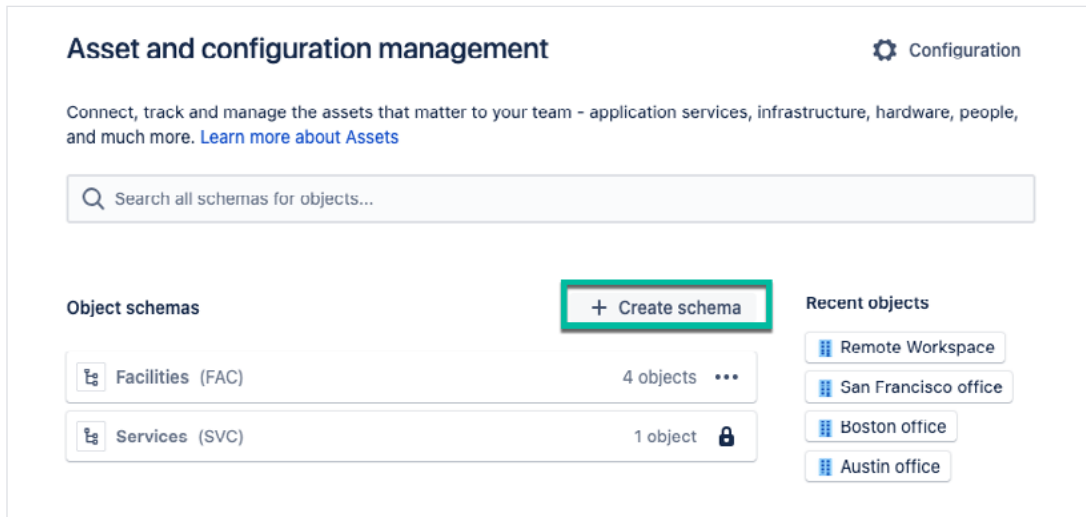
Search this schema... Create object \*\*\*

Objects

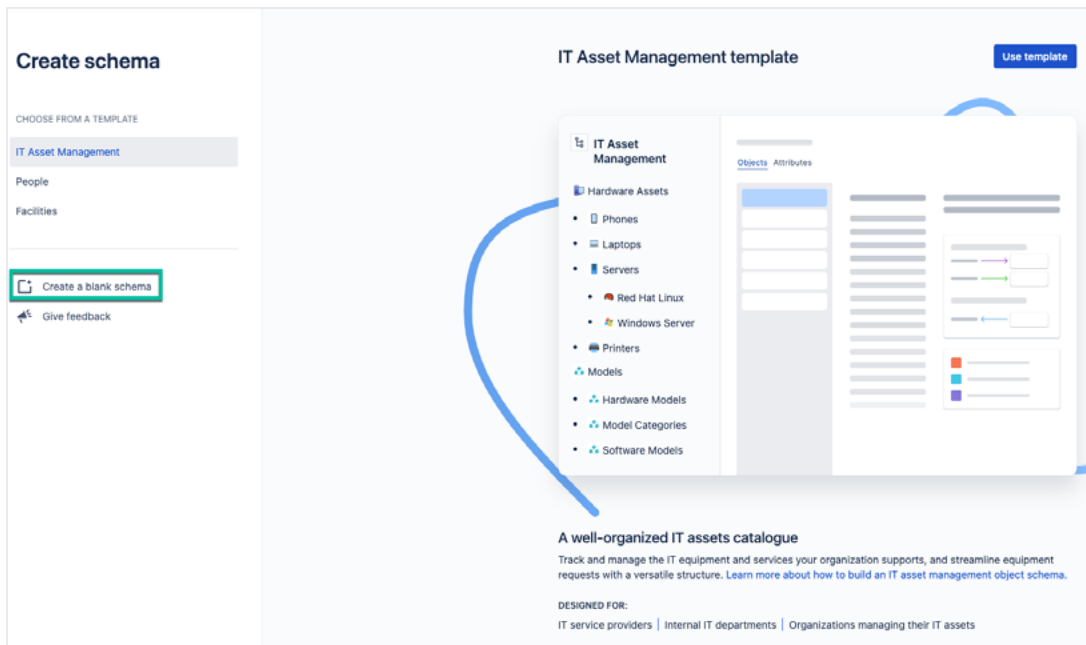
Attributes

ID	Name	Description	Type	Type Value	Additional Value
56	Key		Default	Text	
57	Name	The name of the temporary location	Default	Text	Cancel Update
58	Created		Default	Date time	
59	Updated		Default	Date time	
71	Description	Description of temporary location	Default	Text	***
			Default	Text	Add

## Step 5 - Create an object schema, object type, and objects for Employees



Display the **Create schema** window then select the **Create a blank schema** option.



## Add schema details

\* Indicates a required field


Schema name\*

You can use letters, numbers and periods.

Key\*

You can use letters, numbers and periods.

Description



Go back Create schema

Configure the new object schema, and select *Allow others to select objects from this schema* because the employee data should be referenceable by other objects. Then click **Back to Employees view**.

← Back to Employees view

## Configure Employees

General Reference types Statuses Roles Import

You can edit the name and description of your object schema here, as well as enable configuration options. [Learn more about managing object schemas.](#)

Id	3
Name	Employees
Description	
Key	EM
Number of object types	0
Number of objects	0
Created	28/Aug/23 11:06 AM

### General configuration

- ☒ Enable quick creation of referenced objects
- ☒ Validate objects attributes in quick object creation
- ☒ Allow others to select objects from this schema

Create an object type for **Employees**.


### New object type

Name \*

Employees

Max. 50 characters.

Icon \*

 User

Parent

None

Description

A place to store employee information

Max. 70 characters.

☐ Create another

Cancel

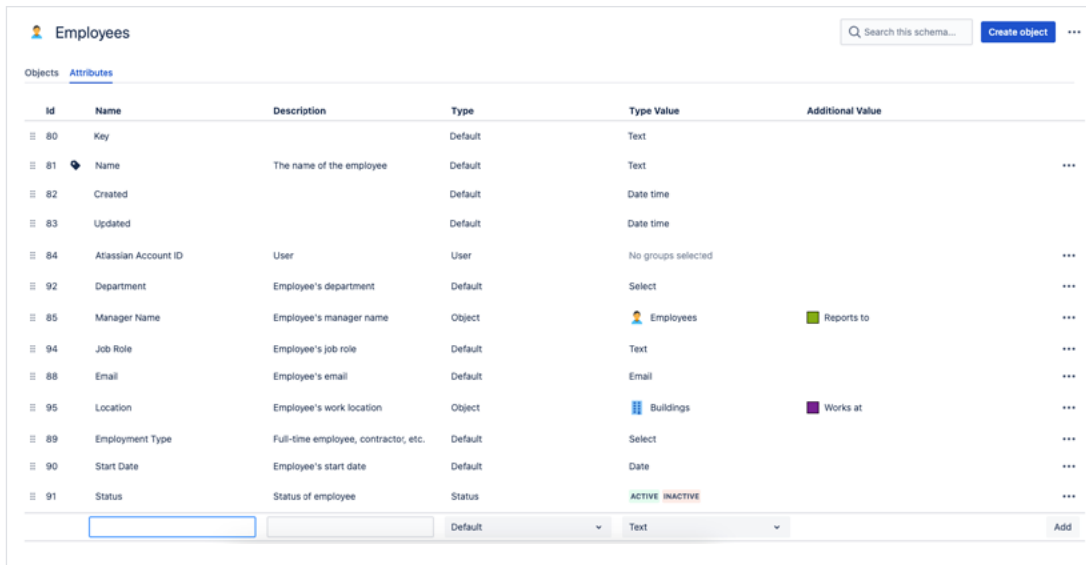
Create

Select the **Attributes** option for **Employees** object type and add information important to your organization.

Name	Type	Value	Additional Value
Atlassian Account ID	User		
Department	Default	Select	HR IT Finance Marketing Operations R&D
Manager Name	Object	Employees	Reports to
Job Role	Default	Text	
Email	Default	Email	
Location	Object	Buildings	Reference Skip this attribute if your organization does not need to track multiple buildings
Employment Type	Default	Select	Full-time Employee Contractor
Start Date	Employee start date	Date	
Status	Status		



For the **Name** attribute, update the name data to “Employee Name,” click the **ellipsis** icon, and configure the Name attribute to be unique so you avoid duplicate employee names.

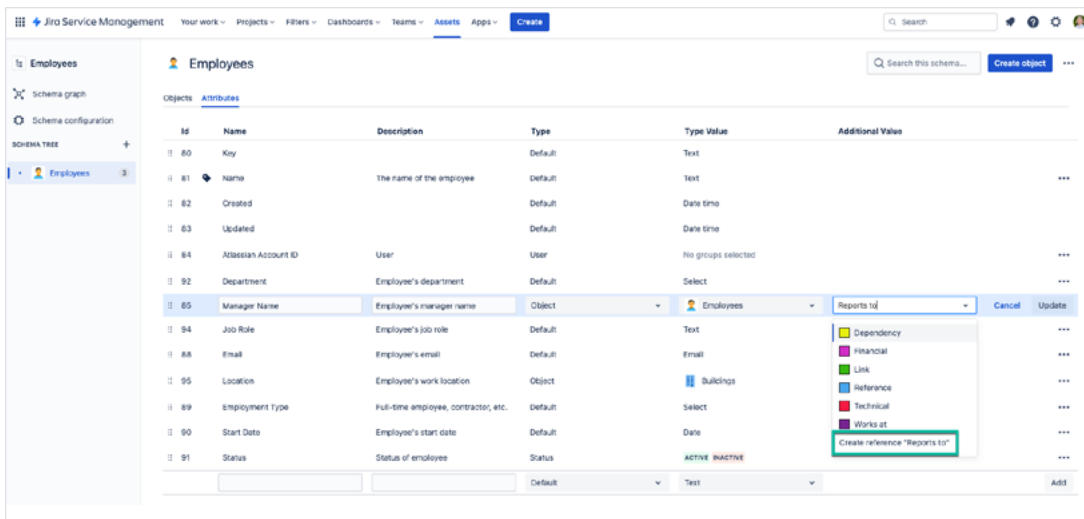


Id	Name	Description	Type	Type Value	Additional Value
80	Key		Default	Text	
81	Name	The name of the employee	Default	Text	...
82	Created		Default	Date time	
83	Updated		Default	Date time	
84	Atlassian Account ID	User	User	No groups selected	...
92	Department	Employee's department	Default	Select	...
85	Manager Name	Employee's manager name	Object	Employees	Reports to
94	Job Role	Employee's job role	Default	Text	...
88	Email	Employee's email	Default	Email	...
95	Location	Employee's work location	Object	Buildings	Works at
89	Employment Type	Full-time employee, contractor, etc.	Default	Select	...
90	Start Date	Employee's start date	Default	Date	...
91	Status	Status of employee	Status	ACTIVE INACTIVE	...

Configure the **Department** attribute and add options important to your organization:

- Finance
- HR
- IT
- Marketing
- Operations
- R&D

For the **Manager Name** attribute, use an existing reference value or enter a new reference value by clicking on the item and entering the new value.



Configure the **Employment Type** attribute and add relevant data.

- Full-time Employee
- Part-time Employee
- Contractor

### Configure: Employment Type

General
Options
Cardinality

Add

Full-time employee

Part-time Employee

Contractor

### PRO TIP

Do not enter a **Type Value** for the **Status** field so that all values are allowed. We will be developing additional functionality for the **Employees** object type and want the flexibility to add more status values.


Now, we are ready to create employee entries, so click the **Create Object** option to display the **Create Object** window.

### Create object

Object Type \*

Employees

Icon


 Change icon

Name \*

Jennifer Fish

The name of the employee

Atlassian Account ID

 Jennifer Fish


User

Department

Marketing

Employee's department

Manager Name

 Blythe Smithson

Employee's manager name

Job Role

Content Specialist


Employee's job role

Email

jfish@atlassian.com

Employee's email

Location

 Remote Workspace

Employee's work location

Employment Type

Contractor

Full-time employee, contractor, etc.

Start Date

7/25/2022

Employee's start date

Status

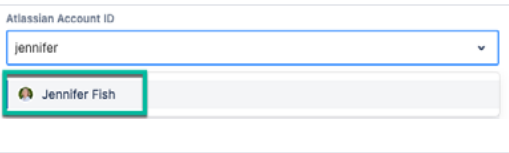
ACTIVE

Status of employee

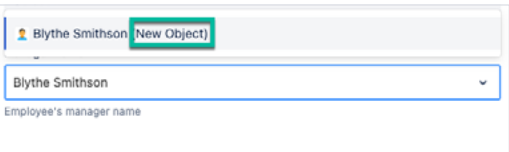
☐ Create another

Cancel Create

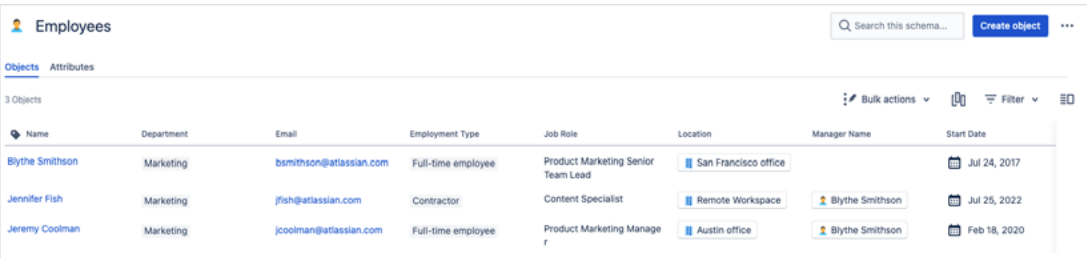
In the **Atlassian Account ID** attribute, type a few characters of the employee's ID, and a list of Jira accounts is provided; click on the appropriate item to enter the value.



In the **Manager Name** attribute, type a few characters of the manager's name and a list of objects with matching names is provided. An existing reference object can be selected or a new reference object can be created by clicking on the item and entering the value. Be sure to update the new object with additional data, if needed.



Add your primary team member data; additional employee objects can be created when needed.



Name	Department	Email	Employment Type	Job Role	Location	Manager Name	Start Date
Blythe Smithson	Marketing	bsmithson@atlassian.com	Full-time employee	Product Marketing Senior Team Lead	San Francisco office		Jul 24, 2017
Jennifer Fish	Marketing	jfish@atlassian.com	Contractor	Content Specialist	Remote Workspace	Blythe Smithson	Jul 25, 2022
Jeremy Coolman	Marketing	jcoolman@atlassian.com	Full-time employee	Product Marketing Manager	Austin office	Blythe Smithson	Feb 18, 2020

Select an **Employee** object and display the object record; the display contains the defined attributes, references, update history, comments, and printable QR code.

The screenshot shows the 'Employees' object record for Blythe Smithson. The interface includes a search bar, a 'Create object' button, and tabs for 'Objects' and 'Attributes'. The 'Details' tab is active, showing a table of attributes: Name (Blythe Smithson), Department (Marketing), Job Role (Product Marketing Manager), Email (bsmithson@atlassian.com), and Location (San Francisco office). A 'Linked objects' section on the right shows 'Outbound references' (Works at San Francisco office) and 'Inbound references' (Reports to Employees). A green box highlights the 'Object graph' button in the 'Linked objects' section.

Click the **Object Graph** option to display the object and relationships.

The screenshot shows the 'Object details' view for Blythe Smithson. The left side displays a graph showing relationships between Blythe Smithson, Jeremy Coolman, Jennifer Fish, and San Francisco office. The right side shows a table of object details: Key (EM-10), Name (Blythe Smithson), Created (Aug 17, 2023, 4:53 PM), Updated (Aug 17, 2023, 5:05 PM), Department (Marketing), Job Role (Product Marketing Manager), Email (bsmithson@atlassian.com), Location (San Francisco office), Employment Type (Full-time employee), Start Date (Jul 24, 2017), and Status (ACTIVE).

## PRO TIP

You can quickly update, export, delete, and print QR codes for assets through the bulk actions function. Query for the objects you want to modify, then click on the Bulk actions option to display the bulk action options.

The screenshot shows the 'Employees' object type interface. At the top, there's a search bar and a 'Create object' button. Below, there's a table with columns: Name, Department, Email, Employment Type, Job Role, Location, and Date. Three employees are listed: Blythe Smithson, Jennifer Fish, and Jeremy Coolman. A 'Bulk actions' dropdown menu is open, showing options: Edit objects, Export objects, Print QR codes, and Delete objects. The menu is titled 'Bulk change 3 selected objects'.

Name	Department	Email	Employment Type	Job Role	Location	Date
Blythe Smithson	Marketing	bsmithson@atlassian.com	Full-time employee	Product Marketing Senior Team Lead	San Francisco office	24, 2017
Jennifer Fish	Marketing	jfish@atlassian.com	Contractor	Content Specialist	Remote Workspace	25, 2022
Jeremy Coolman	Marketing	jcoolman@atlassian.com	Full-time employee	Product Marketing Manager	Austin office	18, 2020

## Edit 3 objects

This will edit all objects in this object type that match the currently selected filters.

Name

Keep

The name of the employee

Atlassian Account ID

Keep

Select...

User

Department

Change

Select...

Manager Name

Keep

HR

IT

Finance

Marketing

Operations

R&D

Job Role

Keep

Email

Keep

Employee's email

Location

Keep

Select...

## Step 6 - Create an object schema and object type for Business Partners

We will include manufacturer data in IT asset records, so we must create a **Business Partners** object schema first, so information can be referenced by the **IT Assets** object schema we create next. We will also create object types for vendors and suppliers which we can use in future cases for tracking vendor and supplier information.

If your organization does not need to manage business partners at this level, skip to Step 9; the functionality can be added and data updated when needed.

### Asset and configuration management

Configuration

Connect, track and manage the assets that matter to your team - application services, infrastructure, hardware, people, and much more. [Learn more about Assets](#)

Search all schemas for objects...

#### Object schemas

+ Create schema

Employees (EM)

3 objects

...

Facilities (FAC)

4 objects

...

Services (SVC)

1 object

🔒

#### Recent objects

Blythe Smithson

Jeremy Coolman

Remote Workspace

San Francisco office

Boston office

[View more](#)

Display the **Create Schema** window, select the **Create a blank schema** option, enter **Business Partners** schema information, then configure the object schema to select *Allow others to select objects from this schema*.

### Add schema details

\* Indicates a required field

Schema name \*

Business Partners

You can use letters, numbers and periods.


Key \*

BP

You can use letters, numbers and periods.

Description

A place to store business partners and various information about them



[Go back](#) [Create schema](#)

[← Back to Business Partners view](#)

## Configure Business Partners

[General](#) [Reference types](#) [Statuses](#) [Roles](#) [Import](#)

You can edit the name and description of your object schema here, as well as enable configuration options. [Learn more about managing object schemas.](#)

Id	4
Name	Business Partners
Description	A place to store business partners and various information about them
Key	BP
Number of object types	0
Number of objects	0
Created	28/Aug/23 3:57 PM

### General configuration

- ☒ Enable quick creation of referenced objects
- ☒ Validate objects attributes in quick object creation
- ☒ Allow others to select objects from this schema



Create an object type for **Business Partners** and configure the object type with *Pass all attributes to child object types* and *Set this object as abstract*.


### New object type

Name <sup>\*</sup>

Business Partners

Max. 50 characters.

Icon <sup>\*</sup>

 Factory ▼

Parent


None ▼

Description

A place to store business partner information

Max. 70 characters.

☐ Create another Cancel Create

 Back to Business Partners view

## Configure Business Partners

General Roles Inheritance

Inheritance allows you to automatically pass attributes from parent object types to child object types. [Learn more about inheritance.](#)

☒ Pass all attributes to child object types. [Learn more about inheritance.](#)

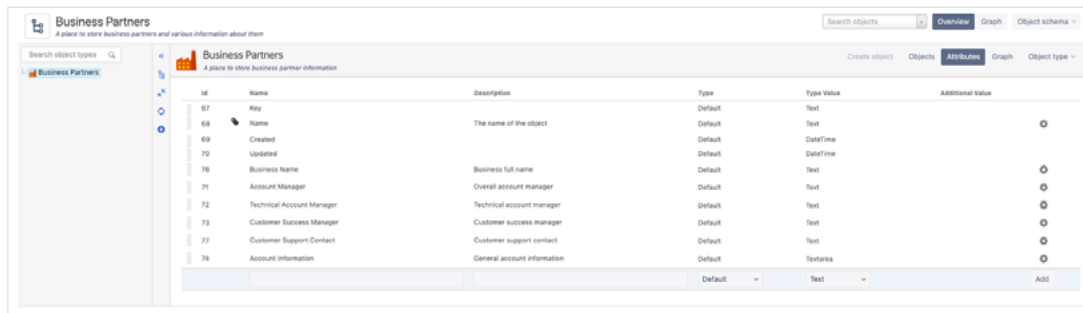
☒ Set this object as abstract. [Learn more about abstract object types.](#)

**PRO TIP**

Create a parent object type when you have similar data sets with different sources and/or uses. Using a parent object type, you can create multiple child object types and maintain the same structure. As you add or update attributes in the parent object type, the attributes will also be added/updated to the child object types. Conversely, you can add attributes to child object types without the attribute being included in the parent object type.

Note that all attributes will be copied from the parent object type and cannot be modified in the child object types. If an inherited attribute is deleted from the parent or child object types, the attribute is removed from all the object types in this inheritance tree.

Select the **Attributes** option for **Business Partners** object type and add information important to your organization.



Name	Type	Value	Additional Value
Business Name	Default	Text	
Account Manager	Default	Text	
Technical Account Manager	Default	Text	
Customer Success Manager	Default	Text	
Customer Support Contact	Default	Text	
Account Information	Default	Textarea	

## Step 7 - Create an object type and objects for Manufacturers


Create an object type for **Manufacturers** and select **Business Partners** as the **Parent**.

### New object type


Name \*

Max. 50 characters.

Icon \*

 Factory

Parent


 Business Partners

Description

Max. 70 characters.

☐ Create another

Cancel **Create**

 **Manufacturers**

Search this schema... **Create object** ...

Objects <a href="#">Attributes</a>					
Id	Name	Description	Type	Type Value	Additional Value
834	Key		Default	Text	
835	Name	The name of the object	Default	Text	...
836	Created		Default	Date time	
837	Updated		Default	Date time	
838	Business Name	Business full name	Default	Text	...
839	Account Manager	Overall account manager	Default	Text	...
840	Technical Account Manager	Technical account manager	Default	Text	...
841	Customer Success Manager	Customer success manager	Default	Text	...
842	Customer Support Manager	Customer support manager	Default	Text	...
843	Account Information	General account information	Default	Text area	...
			Default	Text	Add

There is no need to add or modify the Manufacturers object type configuration or attributes because the settings were copied from the Business Partners object type.

### PRO TIP

It is important to note that any object types created or copied from a parent object type will include the parent's inheritance setting. If a parent object type passes attributes to child object types, then all subsequent object types will pass attributes to their children. You can easily create an object type with no inheritance by creating an object type with no parent object type.




Click the **Create object** button to display the **Create Object** window.

### Create object

Object Type \*

Manufacturers

Icon

 [Change icon](#)

Name \*

Atlassian

The name of the object

Business Name

Atlassian Corporation

Business full name

Account Manager

Amanda Hallson

Overall account manager

Technical Account Manager

Scott Florian

Technical account manager

Customer Success Manager

Tomasz Wojtasik

Customer success manager

Customer Support Manager

Lilian Chu

Customer support manager

Account Information

Atlassian support site:  
<https://support.atlassian.com/>

General account information

☐ Create another

[Cancel](#) [Create](#)

Add your primary asset manufacturer data; additional manufacturer objects can be created when needed.

The screenshot displays the 'Manufacturers' section of a software interface. On the left, a sidebar lists various manufacturers: AMI, Apple, Atlassian (selected), Dell, HP, Lenovo, Salesforce, Sony, USU, and VMware. The main area shows the details for 'Atlassian' (ID: EP-104). The 'Details' tab is active, displaying a table of contact information:

Name	Value
Name	Atlassian
Business Name	Atlassian Corporation
Account Manager	Amanda Hallson
Technical Account Manager	Scott Florian
Customer Success Manager	Tomasz Wojtasik
Customer Support Manager	Lilian Chu

Below this table, the 'Account Information' section shows the Atlassian support site (support.atlassian.com). To the right of the details, there are three panels: 'Linked objects' (showing no inbound or outbound references), 'Linked issues' (showing no issues found), and 'Attachments'. The 'Attachments' panel lists a file named 'Useful IT Go Links.pdf' (694 KB) created on August 17, 2023, at 5:54 PM. At the bottom, it notes the object was created on April 21, 2023, at 11:30 AM and modified on August 17, 2023, at 5:54 PM.

## Step 8 - Create an object types and objects for Vendors and Suppliers

Create an object type for **Vendors**, select **Business Partners** as the **Parent**, and click **Create another** to create multiple entries.


### New object type

Name \*


Vendors

Max. 50 characters.

Icon \*

 Cottage

Parent

 Business Partners

Description

A place to store vendor information

Max. 70 characters.

☒ Create another      Cancel      **Create**



Create an object type for **Suppliers** and select **Business Partners** as the **Parent**.


### New object type

Name \*


Suppliers

Max. 50 characters.

Icon \*

 Shop

Parent

 Business Partners

Description

A place to store supplier information

Max. 70 characters.

☐ Create another


Cancel

Create

All attributes are copied from the parent object type to the children. If you want to track more information in children object types, additional attributes are simple to include.

Select the **Vendors** object type, click on **Attributes**, and add another attribute, **Vendor Category**. Because we configured the Vendor object type to pass all attributes to child object types, any changes to the Vendor Category will be passed along to any future children object types.

### Configure: Vendor Category

 Configuring this attribute will modify its properties for both the current object type and all affected object types in this inheritance tree.

GeneralOptionsCardinality


Add

⋮ Advertisement	×
⋮ Computer accessories	×
⋮ Credit card	×
⋮ Desktops and workstations	×
⋮ General construction	×
⋮ Insurance	×
⋮ Monitors and projectors	×
⋮ Networking equipment	×
⋮ Notebooks and tablets	×
⋮ Office supplies	×
⋮ Printers and scanners	×
⋮ Professional services	×
⋮ Servers	×
⋮ Software	×
⋮ Storage and backups	×

Add your primary vendor data; additional supplier and vendor objects can be created when needed.


### Create object

Object Type \*

 Vendors

▼

Icon

 Change icon

Name \*

Zones

The name of the object

Business Name

Zones, Inc

Business full name

Account Manager

Firoz Lalji

Overall account manager

Technical Account Manager

Steve Koenig

Technical account manager

Customer Success Manager

Customer success manager

Customer Support Manager

800-408-9663

Customer support manager

Account Information

https://www.zones.com

General account information

Vendor Category

Desktops and workstations

✕ ▼

☐ Create another

Cancel

Create

## Step 9 - Create an object schema for IT Assets

Now, we will create an **IT Assets** object schema that will reference information in the Employees and Manufacturer object types.

Display the **Create Schema** window, select the **Create a blank schema** option, enter **IT Assets** object schema information, then configure the object schema to select *Allow others to select objects from this schema*.

### Asset and configuration management

Configuration

Connect, track and manage the assets that matter to your team - application services, infrastructure, hardware, people, and much more. [Learn more about Assets](#)

#### Object schemas

Business Partners (BP)

6 objects

...

Employees (EM)

3 objects

...

Facilities (FAC)

4 objects

...

Services (SVC)

1 object

🔒

+ Create schema

#### Recent objects

Atlassian

AMI

Blythe Smithson

Jeremy Coolman

Remote Workspace

[View more](#)

### Add schema details

\* Indicates a required field

Schema name \*

IT Assets

You can use letters, numbers and periods.

Key \*

ITASSET

You can use letters, numbers and periods.

Description

A place to track IT hardware and software assets and configurations

Go back

Create schema

[← Back to IT Assets view](#)

## Configure IT Assets

[General](#) [Reference types](#) [Statuses](#) [Roles](#) [Import](#)

You can edit the name and description of your object schema here, as well as enable configuration options. [Learn more about managing object schemas.](#)

Id	5
Name	IT Assets
Description	
Key	ITASSET
Number of object types	0
Number of objects	0
Created	28/Aug/23 5:57 PM

### General configuration

- ☒ Enable quick creation of referenced objects
- ☒ Validate objects attributes in quick object creation
- ☒ Allow others to select objects from this schema

### PRO TIP

The object schema **Key** is a series of alphanumeric characters and identifies the data related to your object schema. You can enter a **Key** value for an object schema when you create the record; however, the data cannot be modified later.

Select the **Statuses** option for **IT Assets** object schema and add the following data.

Name	Category	Description
Ordered	Inactive	Asset is ordered but not in stock
In Transit	Inactive	Asset is being transported
In Stock	Pending	Asset is in stock but not in use
In Use	Active	Asset is deployed and functioning
Retired	Inactive	Asset is deployed but no longer in use
Disposed	Inactive	Asset is disposed and removed from accounting records
Missing	Inactive	Asset is not found in its expected location

### Create status

Name \*

In Use

Max. 30 characters.

Description

Asset is deployed and functioning

Max. 255 characters.

Category \*

Active

Cancel

Create








[Back to IT Assets view](#)

### Configure IT Assets

[Overview](#) [Reference types](#) [Statuses](#) [Rules](#) [Import](#)

A status indicates the state of an object. You can create, update and delete different types of status for the current object schema here. [Learn more about statuses](#).

[Create a status](#)

ID	Name	Description	Category	Actions
16	Disposed	Asset is disposed and removed from accounting records	 Inactive	<a href="#">Delete</a>
13	In Stock	Asset is in stock but not in use	 Pending	<a href="#">Delete</a>
23	In Transit	Asset is being transported	 Pending	<a href="#">Delete</a>
19	In Use	Asset is deployed and functioning	 Active	<a href="#">Delete</a>
22	Missing	Asset is not found in its expected location	 Inactive	<a href="#">Delete</a>
15	Ordered	Asset is ordered but not in stock	 Pending	<a href="#">Delete</a>
10	Retired	Asset is deployed but no longer in use	 Inactive	<a href="#">Delete</a>

## PRO TIP

For this use case, we are focusing on status values for assets; however, **Assets** allows us to extend functionality as the organization's needs change and grow. For example, we can include additional status values (or use existing values) to track asset/CI operational statuses and link the value to discovery operations.


## Step 10 - Create an object type for Hardware

### New object type

Name \*

Max. 50 characters.

Icon \*

 Workstation ▼

Parent

None ▼

Description

Max. 70 characters.

☐ Create another      [Cancel](#) [Create](#)

Create an object type for **Hardware** and configure the object type with *Pass all attributes to child object types* and *Set this object as abstract* settings.

### Configure Hardware

[General](#) [Roles](#) [Inheritance](#)

Inheritance allows you to automatically pass attributes from parent object types to child object types. [Learn more about inheritance.](#)

- ☒ Pass all attributes to child object types. [Learn more about inheritance.](#)
- ☒ Set this object as abstract. [Learn more about abstract object types.](#)



Select the **Attributes** option for **Hardware** object type and add information important to your organization.

Name	Type	Value	Additional Value
Asset Tag	Default	Text	
Serial Number	Default	Text	
Model Name	Default	Text	
Model ID	Default	Text	
Location	Object	Rooms	Located in
Manufacturer	Object	Manufacturers	Reference
Vendor	Object	Vendors	Link
PO Number	Default	Text	
Invoice Number	Default	Text	
Unit Price	Default	Integer	
Lease Contract	Default	Text	
Maintenance Contract	Default	Text	
Purchase Date	Default	Date	
Refresh Date	Default	Date	
Last Scan Date/Time	Default	Date time	

Asset Status	Status	Ordered In Transit In Stock In Use Missing Retired Disposed	
Operational Status	Status	Running Stopped	
Assigned User	Object	Employees	Assigned To

Hardware						Q Search this schema...	***
Objects		Attributes					
848	Asset Tag	Asset tag number	Default	Text			***
130	Serial Number	Asset serial number	Default	Text			***
953	Model Name	Asset model name	Default	Text			***
951	Model ID	Asset model ID	Default	Text			***
1043	Location	Location of asset	Object	Rooms	Located in		***
952	Manufacturer	Asset manufacturer	Object	Manufacturers	Reference		***
849	Vendor	Asset vendor	Object	Vendors	Link		***
850	PO Number	Purchase order number	Default	Text			***
858	Invoice Number	Invoice number	Default	Text			***
954	Unit Price	Asset price	Default	Integer			***
851	Lease Contract	Lease contract ID	Default	Text			***
852	Maintenance Contract	Maintenance contract ID	Default	Text			***
722	Install Date	Asset installation date	Default	Date			***
723	Refresh Date	Asset refresh/update date	Default	Date			***
724	Last Scan Date/Time	Last date/time the asset was detected by discovery or monitoring tools	Default	Date time			***
166	Asset Status	Status of asset (e.g., In stock, In use, etc.)	Status	DISPOSED IN STOCK IN USE ORDERED RETIRED MISSING IN TRANSIT			***
818	Operational Status	Health status of asset/GI	Status	RUNNING STOPPED			***
131	Assigned User	Name of assigned user	Object	Employees	Assigned to		***

For the **Name** attribute, update the name data to “Asset Name.”

For the **Asset Name**, **Asset Tag**, and **Serial Number** attributes, click the **ellipsis** icon and configure the attributes to be unique, so you avoid duplicate asset data.

Hardware

Search this schema...

...

Objects	Attributes							
848	Asset Tag	Asset tag number	Default	Text				...
130	Serial Number	Asset serial number	Default	Text				...
953	Model Name	Asset model name	Default	Text				...
951	Model ID	Asset model ID	Default	Text				...
1043	Location	Location of asset	Object	Rooms	Located in			...
952	Manufacturer	Asset manufacturer	Object	Manufacturers	Reference			...
849	Vendor	Asset vendor	Object	Vendors	Link			...
850	PO Number	Purchase order number	Default	Text				...
858	Invoice Number	Invoice number	Default	Text				...
954	Unit Price	Asset price	Default	Integer				...
851	Lease Contract	Lease contract ID	Default	Text				...
852	Maintenance Contract	Maintenance contract ID	Default	Text				...
722	Install Date	Asset installation date	Default	Date				...
723	Refresh Date	Asset refresh/update date	Default	Date				...
724	Last Scan Date/Time	Last date/time the asset was detected by discovery or monitoring tools	Default	Date time				...
166	Asset Status	Status of asset (e.g., in stock, in use, etc.)	Status	DISPOSED IN STOCK IN USE ORDERED RETIRED MISSING IN TRANSIT				...
818	Operational Status	Health status of asset/CI	Status	RUNNING STOPPED				...
131	Assigned User	Name of assigned user	Object	Employees	Assigned to			...

Configure

Delete

Set as Label

## Configure: Serial Number



Configuring this attribute will modify its properties for both the current object type and all affected object types in this inheritance tree.

### General Cardinality Validation


☒ Unique ⓘ

Cancel

Update

For the **Unit Price** attribute, configure the suffix to include a currency symbol.

### Configure: Unit Price

 Configuring this attribute will modify its properties for both the current object type and all affected object types in this inheritance tree.

General

Cardinality

Suffix

\$

☐ Unique ⓘ

☐ Show sum ⓘ

Cancel

Update

For the **Assigned User** attribute, you use an existing reference value or enter a new reference value; simply click on the item to enter the new value.

PRO TIP

Although this use case does not include software IT assets, we can copy and update the Hardware object type for future use managing software assets.

Hardware

Search this schema...

Configure object type

Copy object type

Delete object type

Objects	Attributes							
848	Asset Tag	Asset tag number	Default	Text				
130	Serial Number	Asset serial number	Default	Text				
953	Model Name	Asset model name	Default	Text				
951	Model ID	Asset model ID	Default	Text				
1043	Location	Location of asset	Object	Rooms	Located in			
952	Manufacturer	Asset manufacturer	Object	Manufacturers	Reference			
849	Vendor	Asset vendor	Object	Vendors	Link			
850	PO Number	Purchase order number	Default	Text				
858	Invoice Number	Invoice number	Default	Text				
954	Unit Price	Asset price	Default	Integer				
851	Lease Contract	Lease contract ID	Default	Text				
852	Maintenance Contract	Maintenance contract ID	Default	Text				
722	Install Date	Asset installation date	Default	Date				
723	Refresh Date	Asset refresh/update date	Default	Date				
724	Last Scan Date/Time	Last date/time the asset was detected by discovery or monitoring tools	Default	Date Time				
166	Asset Status	Status of asset (e.g., In stock, In use, etc.)	Status	DISPOSED IN STOCK IN USE ORDERED RETIRED MISSING IN TRANSIT				
818	Operational Status	Health status of asset/CI	Status	RUNNING STOPPED				
131	Assigned User	Name of assigned user	Object	Employees	Assigned to			

Copy object type: Hardware

Copy as \*

Software

Max. 50 characters.

Cancel Copy


Configure the **Software** object type and update the **Icon** and **Description** values.

[← Back to Software view](#)

### Configure Software

[General](#) [Roles](#) [Inheritance](#)

Select a field to enter details about your object type. [Learn more about object types.](#)

ID	134
Name	Software
Icon	 Software Box
Description	A place to store IT software

Select the **Attributes** option for **Software** object type, include relevant information, and delete any unnecessary items.

Name	Type	Value	Additional Value
Title	Default	Text	
Version	Default	Text	
Patch	Default	Text	
Manufacturer	Object	Manufacturers	Reference
Vendor	Object	Vendors	Link
Product Key	Default	Text	
PO Number	Default	Text	
Invoice Number	Default	Text	
Contract	Default	Text	
Maintenance Contract	Default	Text	
GA Date	Default	Date	
Maintenance Renewal Date	Default	Date	
EOS Date	Default	Date	
Last Scan Date/Time	Default	DateTime	
Asset Status	Status	Ordered In Use Retired Disposed	
Operational Status	Status	Running Stopped	
Assigned User	Object	Employees	Assigned To

Software					<input type="text" value="Search this schema..."/> <input type="button" value="Create object"/> <span>...</span>	
Objects		Attributes				
605	Created		Default	Date time		
606	Updated		Default	Date time		
989	Title	Software asset title	Default	Text		...
608	Version	Software asset version	Default	Text		...
990	Patch	Software asset patch level	Default	Text		...
607	Manufacturer	Asset manufacturer	Object	Manufacturers	Reference	...
988	Vendor	Asset vendor	Object	Vendors	Link	...
991	Product Key	Software asset key	Default	Text		...
992	PO Number	Purchase order number	Default	Text		...
993	Invoice Number	Invoice Number	Default	Text		...
994	Contract	Software contract ID	Default	Text		...
995	Maintenance Contract	Maintenance contract ID	Default	Text		...
996	GA Date	Date asset is available for purchase	Default	Date		...
998	Maintenance Renewal Date	Date maintenance contract expires	Default	Date		...
999	EOS Date	End of support date	Default	Date		...
1000	Last Scan Date/Time	Last date/time the asset was detected by discovery or monitoring tools	Default	Date time		...
610	Asset Status	Status of asset (e.g., in stock, in use, etc.)	Status	DISPOSED IN USE ORDERED RETIRED		...
1001	Operational Status	Status of the asset/configuration item functionality	Status	RUNNING STOPPED		...
1002	Assigned User	Name of the employee assigned the asset	Object	Employees	Assigned to	...

Additional object types can be created for **Desktop Software** and **Applications**, when needed.



## Step 11 - Create an object type for Laptops

Create an object type for **Laptops** and select **Hardware** as the **Parent**.


### New object type

Name \*

Laptops


Max. 50 characters.

Icon \*

 Laptop

▼

Parent

 Hardware

✕ ▼

Description

A place to store laptop information

Max. 70 characters.

☐ Create another

Cancel

Create

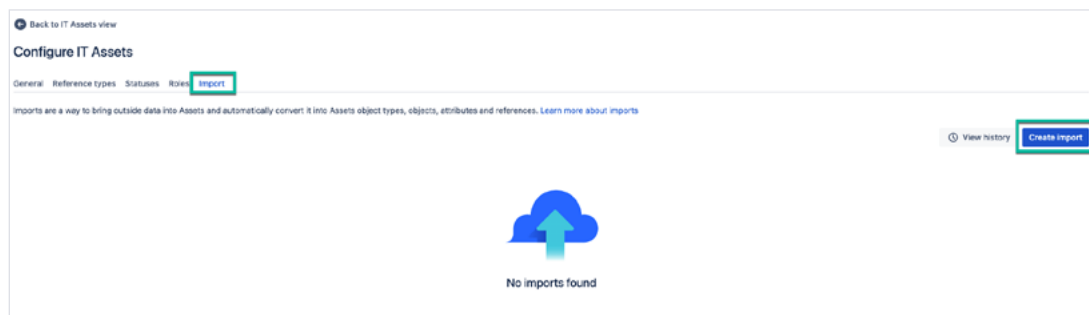
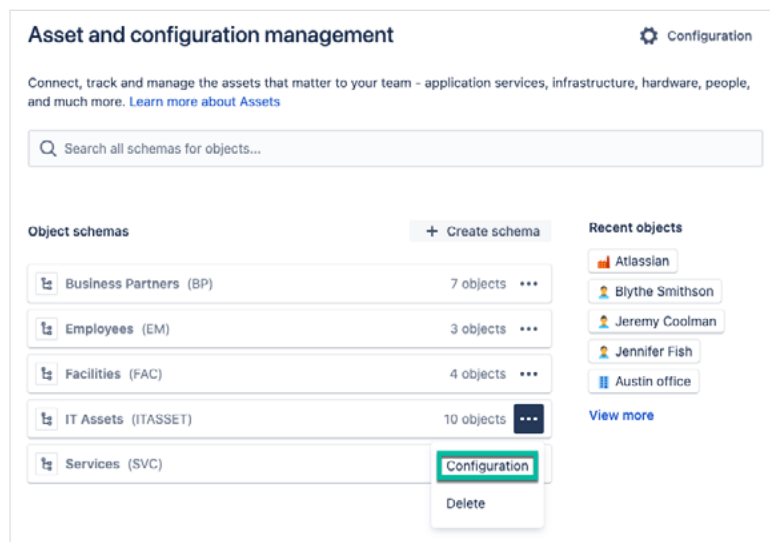
There is no need to add or modify any attributes because the data was copied from the parent object type.

Laptops					
Objects		Attributes			
ID	Name	Description	Type	Type Value	Additional Value
102	Key		Default	Text	
103	Asset Name	Asset Name	Default	Text	...
104	Created		Default	Date time	
105	Updated		Default	Date time	
848	Asset Tag	Asset tag number	Default	Text	...
130	Serial Number	Asset serial number	Default	Text	...
903	Model Name	Asset model name	Default	Text	...
901	Model ID	Asset model ID	Default	Text	...
202	Location	Location of asset	Object	Rooms	Located in
902	Manufacturer	Asset manufacturer	Object	Manufacturers	Reference
849	Vendor	Asset vendor	Object	Vendors	Link
800	PO Number	Purchase order number	Default	Text	...
808	Invoice Number	Invoice number	Default	Text	...
904	Unit Price	Asset price	Default	Integer	...
901	Lease Contract	Lease contract ID	Default	Text	...
802	Maintenance Contract	Maintenance contract ID	Default	Text	...
702	Install Date	Asset installation date	Default	Date	...
703	Refresh Date	Asset refresh/update date	Default	Date	...
704	Last Scan Date/Time	Last date/time the asset was detected by discovery or monitoring tools	Default	Date time	...
100	Asset Status	Status of asset (e.g., In stock, In use, etc.)	Status	DISPOSED IN STOCK IN USE ORDERED RETIRED MISSING IN TRANSIT	...
808	Operational Status	Health status of asset(CI)	Status	RUNNING STOPPED	...

## Step 12 - Define an import structure for the IT Assets object schema and import laptop data

Before starting the data import steps, please ensure that the required reference data is available.

1. Update the attached .csv data file and change the **Assigned User** data to match your Jira users.
2. Confirm the **Manufacturer** and **Vendor** object data match the .csv file data (e.g., Apple, Lenovo, and Zones).



Select the **Import** option, then click **Create import**.

Select **CSV import** type and click **Next**.

The screenshot shows a web interface for selecting an import type. At the top, there are two steps: 'Import type' (active) and 'Define structure'. Below this, the heading 'Select import type' is followed by the instruction 'Select the type of import to create.' There are four rectangular buttons, each with a file icon and text: 'Discovery Import' (discovery icon), 'JSON Import' (JSON icon), 'CSV Import' (CSV icon, highlighted with a green border), and 'External Import' (EXT icon). A blue 'Next' button is located at the bottom right of the interface.

Enter a name for the import and select your CSV file.

Deselect *Automatically create object types and attributes* because you have already defined the **Laptops** object type and attributes.

Note: If your data is complex, there are additional options for defining the data import structure (e.g., delimiters, date format, etc.).

For more information visit the following link:

[Import objects into Assets for Jira Service](#)

Click **Create Import**, and your import definition is created.

Import type

Define structure

### Define import structure

Name \*

Laptop import

Description

Laptop import definition

Upload a file or import data

☒ Upload a file from your computer

Asset and Configuration Managemen for ITSM\_Activity Handbook - Asset and Configuration Managemen for ITSM\_Activity Handbook.csv

☐ Import data from a web address

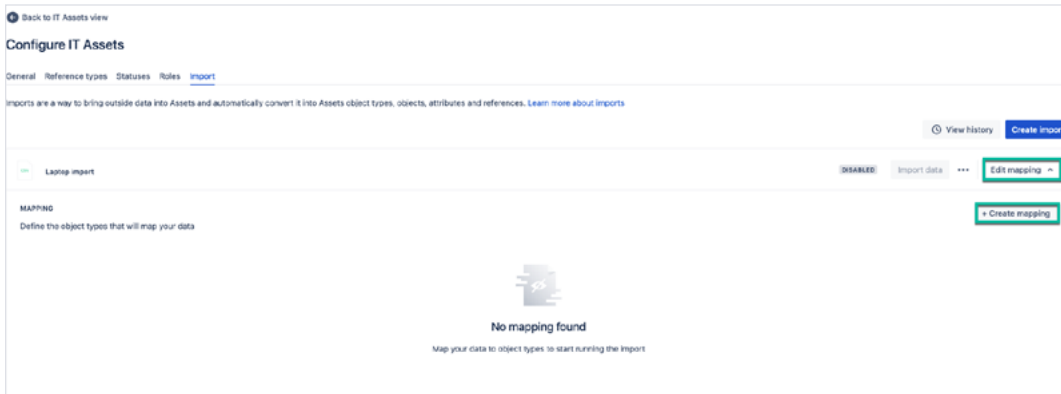
☒ Automatically create object types and attributes

Disabling this option requires you to manually map your data to your schema before importing data. [Learn more.](#)

▼ More options

Back

Create import



The next step is to select **Edit mapping** and click **Create mapping** for the import definition.

**Create object type mapping**

To create objects from imported data, select an objects type and configure how the data will be mapped. [Learn more about object type mapping](#)

Object Type \*

Hardware

- Hardware
- Laptops**
- Software

Case sensitive ▾

Missing objects \*

Ignore ▾

Missing objects outbound references \*

Ignore ▾

Empty values \*

Use default ▾

Unknown values \*

Use default ▾

Cancel **Create**

Select **Laptops** object type and click **Create**.

To build the object type mapping for the import definition, select **Edit attributes mapping**, add data from source file mapping to attributes.

**Configure IT Assets**

General Reference types Statuses Roles **Import**

Imports are a way to bring outside data into Assets and automatically convert it into Assets object types, objects, attributes and references. [Learn more about imports](#)

View history Create Import

**Laptop Import** DISABLED Import data Edit mapping

**MAPPING** Define the object types that will map your data Create mapping

**Laptop** DISABLED Edit attributes mapping

Each data source field will be mapped to a destination object type attribute.

Identifier	Data source field	→	Destination attribute	AGL	Concatenator	Regular expression	Base 64	
<input checked="" type="checkbox"/>		→	Name				<input type="checkbox"/>	Delete
<input type="checkbox"/>	Select...	→	Select...				<input type="checkbox"/>	Add

- Name
- Asset Tag
- Serial Number
- Status

Create the attribute mappings for relevant items.

Data source field	Destination attribute	AQL
Name	Asset Name	
Asset Tag	Asset Tag	
Serial Number	Serial Number	
Status	Asset Status	
Manufacturer	Manufacturer	Name=\${Manufacturer}
Vendor	Vendor	Name=\${Vendor}
Model Name	Model Name	
Model ID	Model ID	
PO	PO Number	
Invoice	Invoice Number	
Price	Unit Price	
Purchase Date	Purchase Date	
Refresh Date	Refresh Date	
Assigned User	Assigned User	Name=\${Assigned User}

For the **Manufacturer**, **Vendor**, and **Assigned User** mapping, you want to create a relationship between the laptop data and the data you created earlier. The AQL syntax is `Attribute=${Name of placeholder}`; the placeholder is the column label in the external data source.

For more information visit the following link:

[Using Assets Query Language \(AQL\) syntax](#)

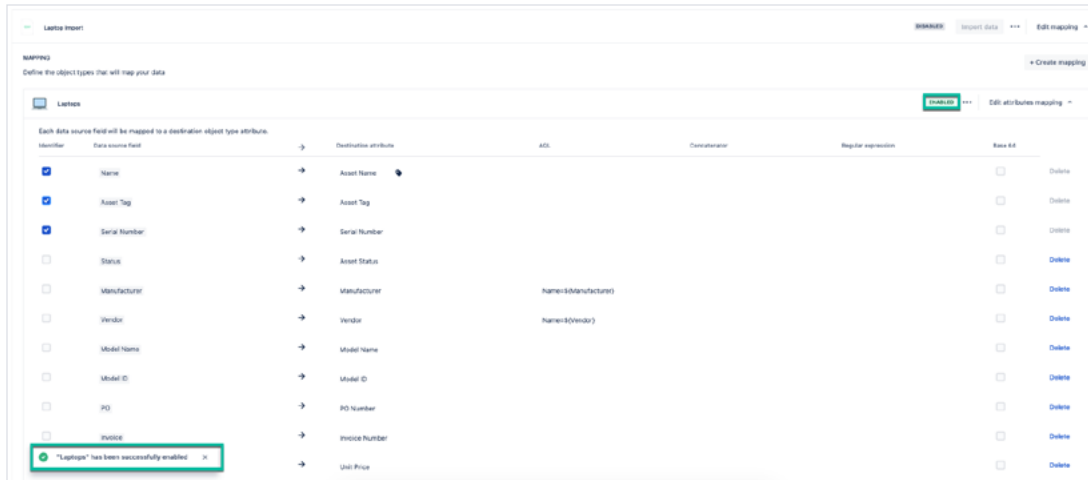
Select **Name**, **Asset Tag**, and **Serial Number** as unique identifiers.

Identifier	Data source field	Destination attribute	AQL	Consideration	Regular expression	Base 64
<input checked="" type="checkbox"/>	Name	Asset Name				<input type="checkbox"/>
<input checked="" type="checkbox"/>	Asset Tag	Asset Tag				<input type="checkbox"/>
<input checked="" type="checkbox"/>	Serial Number	Serial Number				<input type="checkbox"/>
<input type="checkbox"/>	Status	Asset Status				<input type="checkbox"/>
<input type="checkbox"/>	Manufacturer	Manufacturer	Name=\${Manufacturer}			<input type="checkbox"/>
<input type="checkbox"/>	Vendor	Vendor	Name=\${Vendor}			<input type="checkbox"/>
<input type="checkbox"/>	Model Name	Model Name				<input type="checkbox"/>
<input type="checkbox"/>	Model ID	Model ID				<input type="checkbox"/>
<input type="checkbox"/>	PC	PC Number				<input type="checkbox"/>
<input type="checkbox"/>	Invoice	Invoice Number				<input type="checkbox"/>
<input type="checkbox"/>	Price	Unit Price				<input type="checkbox"/>
<input type="checkbox"/>	Purchase Date	Purchase Date				<input type="checkbox"/>
<input type="checkbox"/>	Refresh Date	Refresh Date				<input type="checkbox"/>
<input type="checkbox"/>	Assigned User	Assigned User	Name=\${Assigned User}			<input type="checkbox"/>

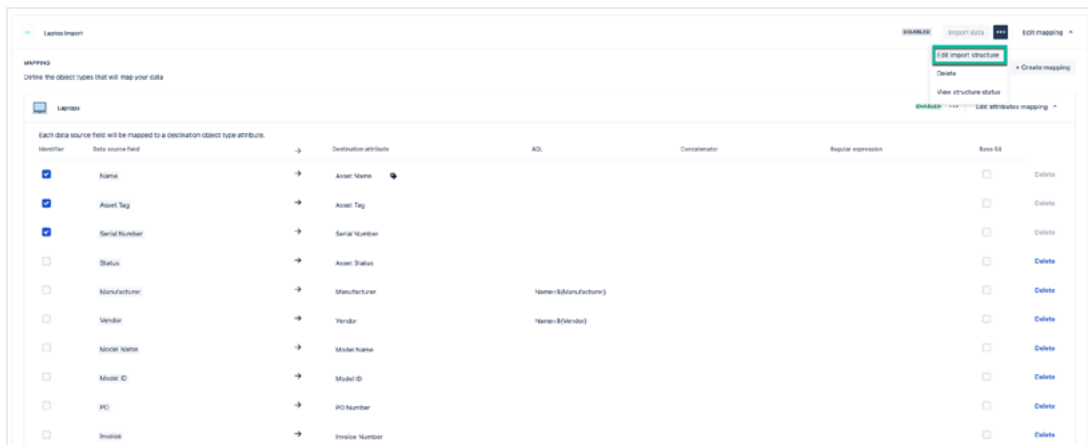
To enable the object type mapping, select the **ellipsis** icon and click **Enable**.

Identifier	Data source field	Destination attribute	AQL	Consideration	Regular expression	Base 64
<input checked="" type="checkbox"/>	Name	Asset Name				<input type="checkbox"/>
<input checked="" type="checkbox"/>	Asset Tag	Asset Tag				<input type="checkbox"/>
<input checked="" type="checkbox"/>	Serial Number	Serial Number				<input type="checkbox"/>
<input type="checkbox"/>	Status	Asset Status				<input type="checkbox"/>
<input type="checkbox"/>	Manufacturer	Manufacturer	Name=\${Manufacturer}			<input type="checkbox"/>
<input type="checkbox"/>	Vendor	Vendor	Name=\${Vendor}			<input type="checkbox"/>
<input type="checkbox"/>	Model Name	Model Name				<input type="checkbox"/>
<input type="checkbox"/>	Model ID	Model ID				<input type="checkbox"/>
<input type="checkbox"/>	PC	PC Number				<input type="checkbox"/>
<input type="checkbox"/>	Invoice	Invoice Number				<input type="checkbox"/>
<input type="checkbox"/>	Price	Unit Price				<input type="checkbox"/>





To enable the import structure, select the **ellipsis** icon, click **Edit import structure** option, then save the import structure.



### Define import structure

Name \*

Laptop Import

Description

Upload a file or import data

☒ Upload a file from your computer

Asset and Configuration Managemen for ITSM\_Activity Handbook - Asset and Configuration Managemen for ITSM\_Activity Handbook.csv

☐ Import data from a web address

More options

Cancel Save

The data is now ready to import, so click **Import data**.

Laptop Import

READY TO RUN Import data Edit mapping

MAPPING

Define the object types that will map your data

Laptops

ENABLED Edit attributes mapping

Each data source field will be mapped to a destination object type attribute.

Identifier	Data source field	→	Destination attribute	ACL	Concatenator	Regular expression	Base 64	
<input type="checkbox"/>	Manufacturer	→	Manufacturer	Name=\${Manufacturer}			<input type="checkbox"/>	Delete
<input type="checkbox"/>	Vendor	→	Vendor	Name=\${Vendor}			<input type="checkbox"/>	Delete
<input type="checkbox"/>	Model Name	→	Model Name				<input type="checkbox"/>	Delete
<input type="checkbox"/>	Model ID	→	Model ID				<input type="checkbox"/>	Delete
<input type="checkbox"/>	PO	→	PO Number				<input type="checkbox"/>	Delete
<input type="checkbox"/>		→	Invoice Number				<input type="checkbox"/>	Delete
<input type="checkbox"/>		→	Unit Price				<input type="checkbox"/>	Delete
<input type="checkbox"/>	Purchase Date	→	Purchase Date				<input type="checkbox"/>	Delete

Laptop Import has been successfully updated

You can now run this import.

When the data import is complete, click **Read details** to view the results.

**Configure IT Assets**

General Reference types Statuses Rules **Import**

Imports are a way to bring outside data into Assets and automatically convert it into Assets object types, objects, attributes and references. [Learn more about imports](#)

[View History](#) [Create Import](#)

**Laptop Import** [Last Import: Aug 31, 2025](#) [Read details](#) [Import data](#) [Edit mapping](#)

**MAPPING** [+ Create mapping](#)


Define the object types that will map your data

**Laptops** **ENABLED** [Edit attributes mapping](#)

Each data source field will be mapped to a destination object type attribute.

Identifier	Data source field	→	Destination attribute	ACL	Concatenator	Regular expression	Base 64	
<input type="checkbox"/>	Manufacturer	→	Manufacturer	Name=\${Manufacturer}			<input type="checkbox"/>	<a href="#">Delete</a>
<input type="checkbox"/>	Vendor	→	Vendor	Name=\${Vendor}			<input type="checkbox"/>	<a href="#">Delete</a>
<input type="checkbox"/>	Model Name	→	Model Name				<input type="checkbox"/>	<a href="#">Delete</a>

## Laptop Import import details

Result	FINISHED
Actor	 Jennifer Fish
Module key	rlabs-import-type-csv
Configuration id	e4713576-62fe-44bb-a9b8-2efdb8aa3572
Duration	2.215 seconds

### Laptops

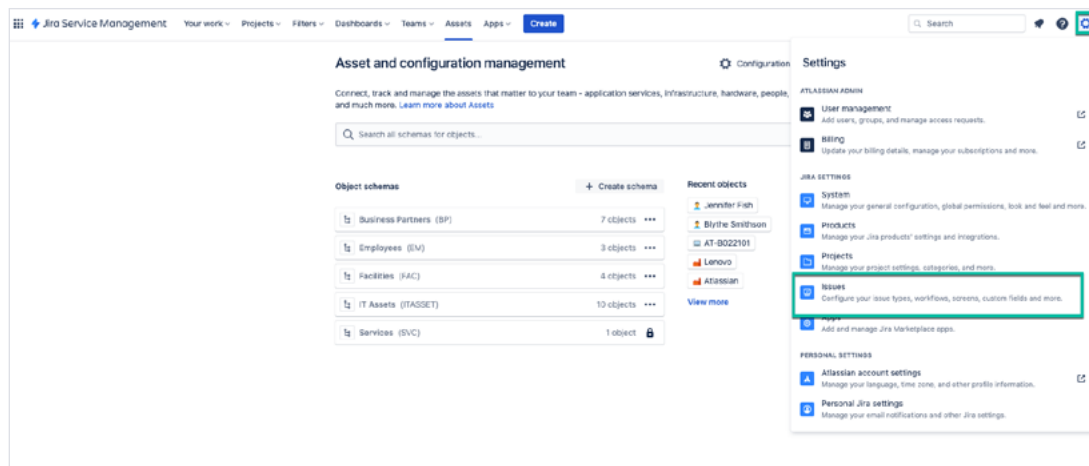
Number of entries	10
Duplicate objects	0
Objects with no identifier in external source	0
Objects missing a label	0
Created objects	10
Updated objects	0
Missing objects deleted	0
Missing objects updated	0
Objects with updated references	8
Identical objects	0
Objects filtered	0
Time reading data	6 ms
Time deciding actions	0 ms

The laptop data is now available.

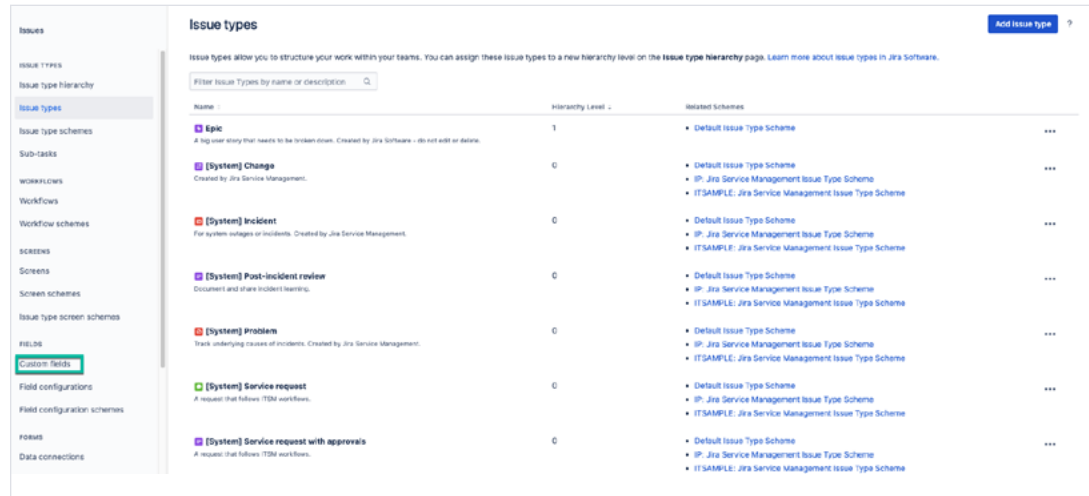


## Step 13 - Create a custom field to store laptop data in a request

The next step is to connect the laptop assets to service requests, so select the Jira Service Management **Setting cog** option and select **Issues**.



On the **Issues types** pane, click **Custom fields** option.



On the **Custom fields** pane, click **Create custom field**.

Issues	Custom fields				
	You currently have 65 active custom fields <a href="#">Create custom field</a>				
Issue types	Active <span>Trash</span>				
	Filter by name or description				
Issue type hierarchy					
Issue types					
Issue type schemes					
Sub-tasks					
Workflows					
Workflow schemes					
Screens					
Screen schemes					
Issue type screen schemes					
Fields					
Field configurations					
Field configuration schemes					
Forms					
Data connections					
Issue features					
	Name	Type	Screens and contexts	Projects	Last used
	Actual end Enter when the change actually ended.	Date Time Picker	6 screens, 1 context	2 projects	No information
	Actual start Enter when the change actually started.	Date Time Picker	6 screens, 1 context	2 projects	No information
	Affected hardware	Text Field (single line)	6 screens, 1 context	2 projects	No information
	Affected Laptop(s)	Assets objects	7 screens, 1 context	2 projects	Not tracked
	Affected services (S00K85) Link services from the service registry to an issue.	Unknown	22 screens, 1 context	2 projects	Not tracked
	Approvals (S00K85) Provides search options for Jira approvals information. This custom field is created programmatically.	Approvals	1 context	None	Not tracked
	Approver groups Contains groups of users needed for approval. This custom field was created by Jira Service...	Group Picker (multiple groups)	22 screens, 1 context	2 projects	No information
	Approvers Contains users needed for approval. This custom field was created by Jira Service...	User Picker (multiple users)	22 screens, 1 context	2 projects	No information
	Backout plan	Text Field (multi-line)	6 screens, 1 context	2 projects	No information
	Change reason Choose the reason for the change request	Select List (single choice)	4 screens, 1 context	2 projects	Aug 17, 2023
	Change risk	Select List (single choice)	6 screens, 1 context	2 projects	Aug 17, 2023
	Change type	Select List (single choice)	6 screens, 1 context	2 projects	Aug 17, 2023

In the **Select a Field Type** window, click **All**, select **Assets objects**, then click **Next**.

Select a Field Type

Search

All

Standard

Advanced

No field preview

Assets objects

Link issues to objects in Assets for Jira Service Management

☐ Checkbox 1
 ☐ Checkbox 2

**Checkboxes**  
 Choose multiple values using checkboxes.

No field preview

Date of First Response

The date of the first comment on an issue by anyone who is not the issue's reporter

23/May/13

Date Picker

A custom field that stores dates and uses a date picker to view them

23/02/13 1:24

Date Time Picker

A custom field that stores dates with a time component

Next

Cancel

Enter **Name** data for the custom field and create the new field.

### Configure 'Assets objects' Field

Name\*

Affected Laptop(s)

Description

Employee laptop(s) affected by issue

Previous

Create

Cancel



Search for your project and associate the new field to the request and incident screens in your project, then click **Update**.

## Issues

### Associate field Affected Laptop(s) to screens

Associate the field Affected Laptop(s) to the appropriate screens. You must associate a field to a screen before it will be displayed. New fields will be added to the end of a tab.

Screen	Tab	
ITSAMPLE: Jira Service Management Screen	Default	<input checked="" type="checkbox"/>
ITSAMPLE: Jira Service Management: Change Create Issue Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Change View/Edit Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Incident Create Issue Screen	Default	<input checked="" type="checkbox"/>
ITSAMPLE: Jira Service Management: Incident View/Edit Screen	Default	<input checked="" type="checkbox"/>
ITSAMPLE: Jira Service Management: Post-Incident Review Create Issue Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Post-Incident Review View/Edit Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Problem Create Issue Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Problem View/Edit Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Request Fulfilment Create Issue Screen	Default	<input checked="" type="checkbox"/>
ITSAMPLE: Jira Service Management: Request Fulfilment View/Edit Screen	Default	<input checked="" type="checkbox"/>

Update

Cancel

In the **Custom fields** pane, search for the new field then update the **Context and default values**.

## Custom fields

You currently have 65 active custom fields [Create custom field](#)

[Active](#) [Trashed](#)

Name	Type	Screens and contexts	Projects	Last used	
Affected hardware	Text Field (single line)	6 screens, 1 context	2 projects	No information	...
Affected Laptop(s) <small>Employee laptop(s) affected by issue</small>	Assets objects	5 screens, 1 context	1 project	Not tracked	...
Affected services <small>(LOOKUP)</small> <small>Link services from the service registry to an issue.</small>	Unknown	22 screens, 1 context	2 projects	Not	<div><div>Edit details</div><div>Contexts and default value</div><div>Translation options</div><div>Associate to Screens</div><div>Move to trash</div></div>

On the **Issues** pane, click **Edit Assets object/s field configuration** to update the configuration context.

## Issues

### Configure Custom Field: Affected Laptop(s)

Below are the Custom Field Configuration schemes for this custom field. Schemes are applicable for various Issues types in a particular context. You can configure a custom field differently for each project context or in a global context. Moreover, project level schemes will over-ride global ones.

[? Get more help about custom field contexts](#)

- [Add new context](#)
- [View Custom Fields](#)

#### Default Configuration Scheme for Affected Laptop(s)

Edit contextDelete context

Default configuration scheme generated by Jira

Applicable contexts for [Edit Configuration](#)

Assets object/s field configuration:

Issue type(s):

- Global (all issues)

[Edit Assets object/s field configuration](#)

Object schema: None

Filter scope (AQL): None

Filter issue scope (AQL): None

Allow search filtering by these attributes: None

Object attributes to display on issue view: None

Field can store multiple objects: No

Display a default object when this field appears in a customer portal: No

To configure the custom field, select **IT Assets** as the **Object schema**.

Enter *objectType="Laptops"* in the **Filter scope (AQL)** field.

To limit the data list to laptops assigned to the issue reporter, include *"Assigned User." "Atlassian Account ID"=\${reporter}* in the **Filter issue scope** field.

Include the relevant values in the **Allow search** filtering by these attributes field:

- Assigned User
- Asset Name

Include options in the **Object attributes to display on issue view** field:

- Asset Name
- Serial Number
- Assigned User
- Refresh Date
- Asset Status

Select **Field can store multiple object**.

## Assets objects field configuration - Affected Laptop(s) (customfield\_10065)

### Field scope

Choose which object schema to use, and which filters to apply on the results shown when searching for objects in the field.

Object schema \*

IT Assets

Select the schema to link to this custom field.

Filter scope (AQL)

objectType="Laptops"

Filter the values that will appear in this custom field using AQL. [Learn more about Filter Scope.](#)

Filter issue scope (AQL)

"Assigned User"."Atlassian Account ID"= \${reporter}

Filter the values that will appear in this custom field using the value of Assets custom fields or Jira System fields in this screen. [Learn more about Filter Issue Scope.](#)

 Filter issue scope (AQL) is not supported when running automation rules

### User interaction

Configure how your field will function for users, and how it will display on the issue view.

Display and search across these attributes in the custom field \*

Assigned User x Asset Name x

Display these attributes in the issue view

Asset Name x Serial Number x Assigned User x Refresh Date x Asset Status x

Field can store multiple objects



Display a default object when this field appears in a customer portal 

Cancel

Save

## Issues

### Configure Custom Field: Affected Laptop(s)

Below are the Custom Field Configuration schemes for this custom field. Schemes are applicable for various issues types in a particular context. You can configure a custom field differently for each project context or in a global context. Moreover, project level schemes will over-ride global ones.

[? Get more help about custom field contexts](#)

- [Add new context](#)
- [View Custom Fields](#)

#### Default Configuration Scheme for Affected Laptop(s)

[Edit context](#)[Delete context](#)

Default configuration scheme generated by Jira

Applicable contexts for [Edit Configuration](#)

scheme:

Issue type(s):

- Global (all issues)

Assets object/s field [Edit Assets object/s field configuration](#)

configuration:

**Object schema:** IT Assets

**Filter scope (AQL):** objectType="Laptops"

**Filter issue scope (AQL):** "Assigned User"."Atlassian Account ID"=\${reporter}

**Allow search filtering by these attributes:** Assigned User, Asset Name

**Object attributes to display on issue view:** Asset Name, Serial Number, Assigned User, Refresh Date, Asset Status

**Field can store multiple objects:** Yes

**Display a default object when this field appears in a customer portal:** No

The custom field is available in the specified project screens.

## PRO TIP

### AQL Basic syntax

The basic syntax of an AQL query is **<attribute> <operator> <value/function>**. One or more objects is returned by the query when the attributes of these objects match the operator and value specified.

*Example: Owner = "Ted Anderson"*

This basic AQL query would return all objects for which the Owner is "Ted Anderson". Note the quotations around "Ted Anderson", since there is a space in the value name.

### Dot notation

Dot notation is used in AQL to travel down a reference chain of objects. The format **<attribute>.<attribute> <operator> <value/function>** will return information based upon objects referenced by the parent object.

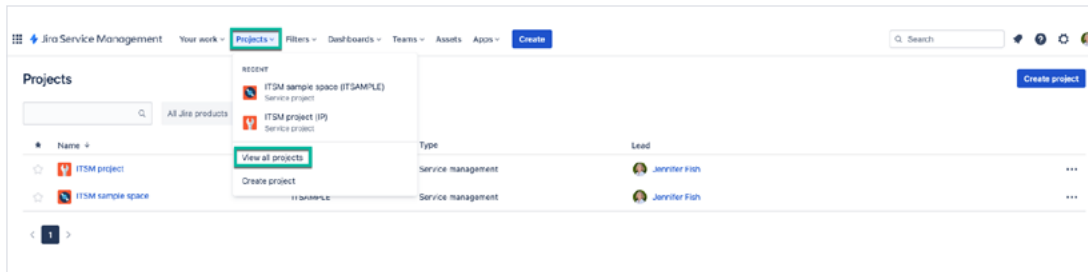
*Example: "Belongs to Department"."Name" = HR*

In this case, the Employee object type has a referenced attribute called "Belongs to Department". This query returns all the Employees which belong to the HR department.

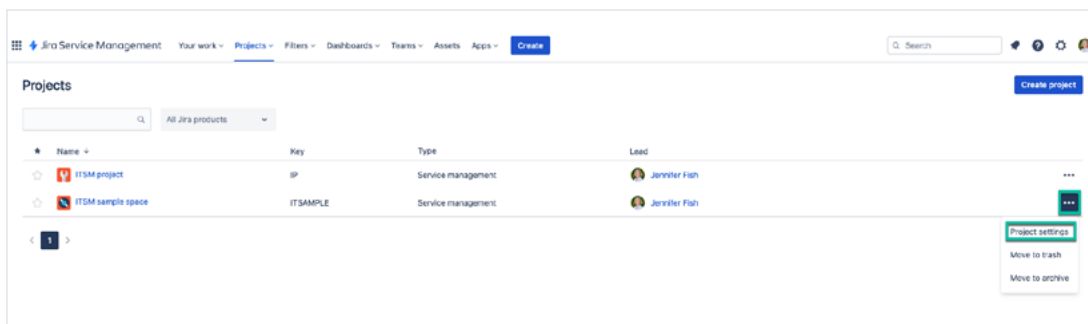
Note that since the referenced attribute contains spaces, it has been enclosed with a pair of double quotes.

## Step 14 - Associate the new custom field with a project request

Select **Projects** option in the Jira Service Management main navigation bar and select **View all projects**.



Click on the **ellipse** icon for your project and select **Project settings**.



Select **Request types** in the service project sidebar, filter on “**hardware**” then click on **Request new hardware** link.

ITSM sample space  
Service project


Back to project

Project settings

- Details
- People
- Features
- Summary
- Issue types
- Request types**
- Forms
- External resources
- Change management
- Incident management

Projects / ITSM sample space / Project settings

### Details



Change icon

Name  
ITSM sample space

Key  
ITSAMPLE

URL

Project type  
Jira Service Management



Projects / ITSM sample space / Project settings

### Service requests

Create request type

Customize the types of service requests your project will use. These will appear in your project navigation under "Service requests".  
Make these request types available in your customer portal by editing your [portal groups](#).

hardware  Issue types  Portal groups

Request type and description	Issue type	Portal groups
 <b>Request new hardware</b> For example, a new mouse or monitor.	 [System] Service request	Computers ...



Use the field search function to locate the new custom field in the **Fields** pane, drag-and-drop the field to the **Request new hardware form**, click **Save**, then click **View** to see the updated request form.

Back to request types View workflow

Request form Issue view Workflow statuses

### Request new hardware

Fields added to the request form are filled out by customers when they raise a request from the portal. [Learn more about the portal](#), or [how to customize fields](#).

Request type description ⓘ  
For example, a new mouse or monitor.

Instructions

Summary REQUIRED

Description Why do you need this? REQUIRED

Attachment

Give feedback Discard View Save changes

**Fields** ⓘ

Search all fields  
affected X

Use fields from any project on your site

Suggested fields ⓘ

Affected Laptop(s)	ISSUE VIEW
Affected hardware	
Affected services	ISSUE VIEW

Create new custom fields ⓘ  
Refresh this page after creating new fields.

Back to request types View workflow

Request form Issue view Workflow statuses

### Request new hardware

Fields added to the request form are filled out by customers when they raise a request from the portal. [Learn more about the portal](#), or [how to customize fields](#).

Request type description ⓘ  
For example, a new mouse or monitor.

Instructions

Summary REQUIRED

Description Why do you need this? REQUIRED

Affected Laptop(s)

Attachment

Give feedback Discard View Save changes

**Fields** ⓘ

Search all fields  
affected X

Use fields from any project on your site

Suggested fields ⓘ



Affected hardware	
Affected services	ISSUE VIEW

Create new custom fields ⓘ  
Refresh this page after creating new fields.

Help Center / ITSM sample space

## Request new hardware










Raise this request on behalf of \*

 Jennifer Fish (jfish@atlassian.com) 

Summary \*

Problem with my laptop


Why do you need this? \*

Normal text ▼ B I ...  ▼        

Affected Laptop(s)

Search... ▼

1 SEARCH RESULT

 Jennifer Fish  
AI-B0Z2103

Send

Cancel

## Step 15 – Create automation for updating a laptop asset status

With the **Affected laptop(s)** field associated with the **Request new hardware** form, we can create automation to update assets when requests are submitted. In this step, we will create another custom field and define the automation steps.

For this use case, we will update a laptop's status if it is reported as lost or stolen.

In the **Request new hardware** form window, click on the **Create new custom fields** link.

The screenshot shows the 'Request new hardware' form in Jira Service Desk. The form is titled 'Request new hardware' and has tabs for 'Request form', 'Issue view', and 'Workflow statuses'. The 'Request form' tab is active. The form contains a 'Request type description' field with a placeholder text 'For example, a new mouse or monitor.' Below this are several sections: 'Instructions', 'Summary' (marked as 'REQUIRED'), 'Description' (marked as 'REQUIRED' with a sub-label 'Why do you need this?'), 'Affected Laptop(s)', and 'Attachment'. On the right side, there is a sidebar with 'Suggested fields' including 'Affected hardware' and 'Affected services'. At the bottom right, a button labeled 'Create new custom fields' is highlighted with a red box.

In the **Custom fields** window, click the **Create custom field** button.

The screenshot shows the 'Custom fields' window in Jira Service Desk. The window has a sidebar on the left with a list of navigation items: 'Issues', 'Issue types', 'Issue type hierarchy', 'Issue type schemes', 'SUD-tasks', 'Workflows', 'Workflow schemes', 'Screens', 'Screen schemes', 'Issue type screen schemes', 'FIELDS', 'Field configurations', 'Field configuration schemes', 'Forms', 'Data connections', and 'Issue features'. The 'FIELDS' item is selected. The main area shows a table of custom fields. The table has columns: 'Name', 'Type', 'Screens and contexts', 'Projects', and 'Last used'. The 'Custom fields' button in the top right corner is highlighted with a red box.

Name	Type	Screens and contexts	Projects	Last used
Actual end	Date Time Picker	6 screens, 1 context	2 projects	No information
Actual start	Date Time Picker	6 screens, 1 context	2 projects	No information
Affected hardware	Text Field (single line)	6 screens, 1 context	2 projects	No information
Affected Laptop(s)	Assets objects	7 screens, 1 context	2 projects	Not tracked
Affected services <b>LOCKED</b>	Unknown	22 screens, 1 context	2 projects	Not tracked
Approvals <b>LOCKED</b>	Approvals	1 context	None	Not tracked
Approver groups	Group Picker (multiple groups)	22 screens, 1 context	2 projects	No information
Approvers	User Picker (multiple users)	22 screens, 1 context	2 projects	No information
Backout plan	Text Field (multi-line)	6 screens, 1 context	2 projects	No information
Change reason	Select List (single choice)	4 screens, 1 context	2 projects	Aug 17, 2022
Change risk	Select List (single choice)	6 screens, 1 context	2 projects	Aug 17, 2022
Change type	Select List (single choice)	6 screens, 1 context	2 projects	Aug 17, 2022

In the **Select a Field Type** window, search on “**select**”, select **Select List (single choice)**, then click **Next**.

Select a Field Type

Search: select

**Select List (cascading)**  
Choose multiple values using two select lists.

**Select List (multiple choices)**  
Choose multiple values in a select list.

**Select List (single choice)**  
A single select list with a configurable list of options.

Next Cancel

In the **Configure ‘Select List (single choice)’ Field** window, enter **Name** and **Options** data for the custom field, then create the new field.

Configure 'Select List (single choice)' Field

Name\*  
Reason for new hardware

Description  
Reason for new hardware request

Options\*  
Add

Asset lost or stolen x

New project x

Previous Create Cancel

Options	Assets lost or stolen	New projects
---------	-----------------------	--------------

Search for your project and associate the new field to the request and incident screens in your project, then click **Update**.

### Issues

#### Associate field Reason for new hardware to screens

Associate the field Reason for new hardware to the appropriate screens. You must associate a field to a screen before it will be displayed. New fields will be added to the end of a tab.

ITSAMPLE

Screen	Tab	
ITSAMPLE: Jira Service Management Screen	Default	<input checked="" type="checkbox"/>
ITSAMPLE: Jira Service Management: Change Create Issue Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Change View/Edit Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Incident Create Issue Screen	Default	<input checked="" type="checkbox"/>
ITSAMPLE: Jira Service Management: Incident View/Edit Screen	Default	<input checked="" type="checkbox"/>
ITSAMPLE: Jira Service Management: Post-Incident Review Create Issue Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Post-Incident Review View/Edit Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Problem Create Issue Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Problem View/Edit Screen	Default	<input type="checkbox"/>
ITSAMPLE: Jira Service Management: Request Fulfilment Create Issue Screen	Default	<input checked="" type="checkbox"/>
ITSAMPLE: Jira Service Management: Request Fulfilment View/Edit Screen	Default	<input checked="" type="checkbox"/>

Update

Cancel

Return to the **Request new hardware** window, drag-and-drop the new field to the form, click **Save**, then click **Preview** to see the updated request form.

Back to request types

View workflow

Request form

Issue view

Workflow statuses

Request new hardware

Fields added to the request form are filled out by customers when they raise a request from the portal. [Learn more about the portal](#), or [how to customize fields](#).

Request type description ⓘ  
For example, a new mouse or monitor.

Instructions

Summary REQUIRED

Description Why do you need this? REQUIRED

Affected Laptop(s)

Attachment

Fields ⓘ

Search all fields  
reason X

Use fields from any project on your site

Suggested fields ⓘ

Change reason

Investigation reason

Pending reason

Reason for new hardware

ISSUE VIEW

[Back to request types](#)
[View workflow](#)

[Request form](#)
[Issue view](#)
[Workflow statuses](#)

## Request new hardware

Fields added to the request form are filled out by customers when they raise a request from the portal. [Learn more about the portal](#), or [how to customize fields](#).

Request type description ⓘ  
For example, a new mouse or monitor.

Instructions

Summary REQUIRED

Description Why do you need this? REQUIRED

Affected Laptop(s)

Reason for new hardware

Attachment

Give feedback

Discard

View

Save changes

### Fields ⓘ

Search all fields

reason

Use fields from any project on your site

#### Suggested fields ⓘ

- Change reason
- Investigation reason
- Pending reason ISSUE VIEW

[Create new custom fields](#)

Refresh this page after creating new fields.

[Help Center](#) / [ITSM sample space](#)

## Request new hardware

Raise this request on behalf of \*

Jennifer Fish (jfish@atlassian.com)

Summary \*

I need another laptop

Why do you need this? \*

Normal text | B I ... | A | | | | | | | | | |

My laptop was stolen, and I need another laptop.

Affected Laptop(s)

AT-B022103 Jennifer Fish x

Reason for new hardware

Asset lost or stolen

Attachment

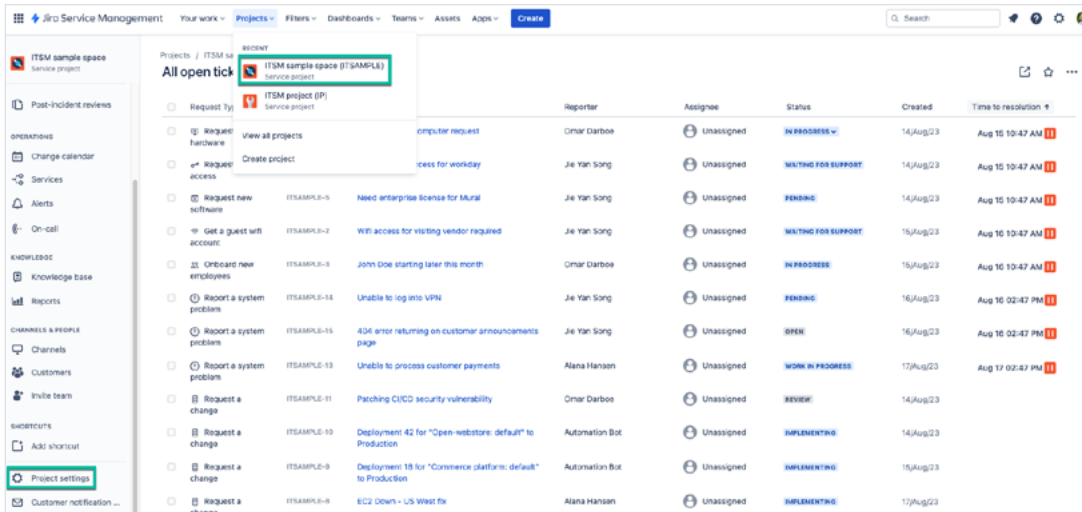
Drag and drop files, paste screenshots, or browse

Browse

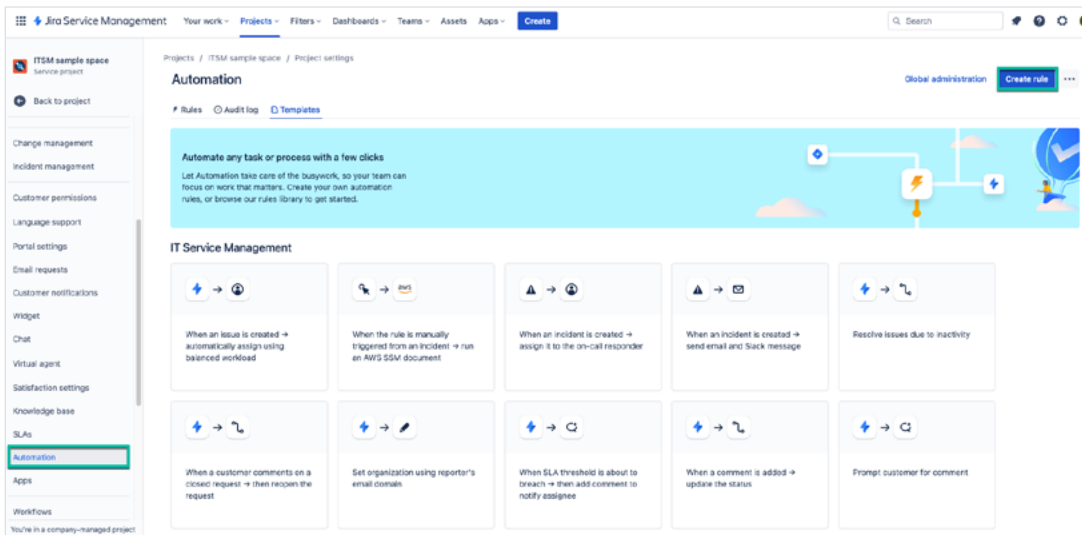
Send Cancel

Now that we have created a custom field to track the reason for requesting new hardware, we can build the automation for updating the status in related asset record if a laptop is stolen or lost.

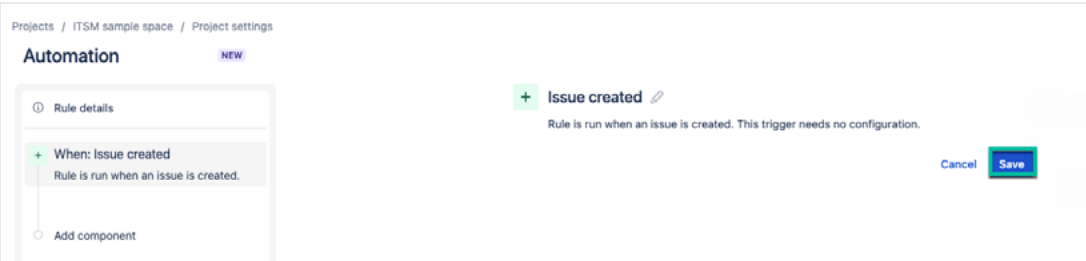
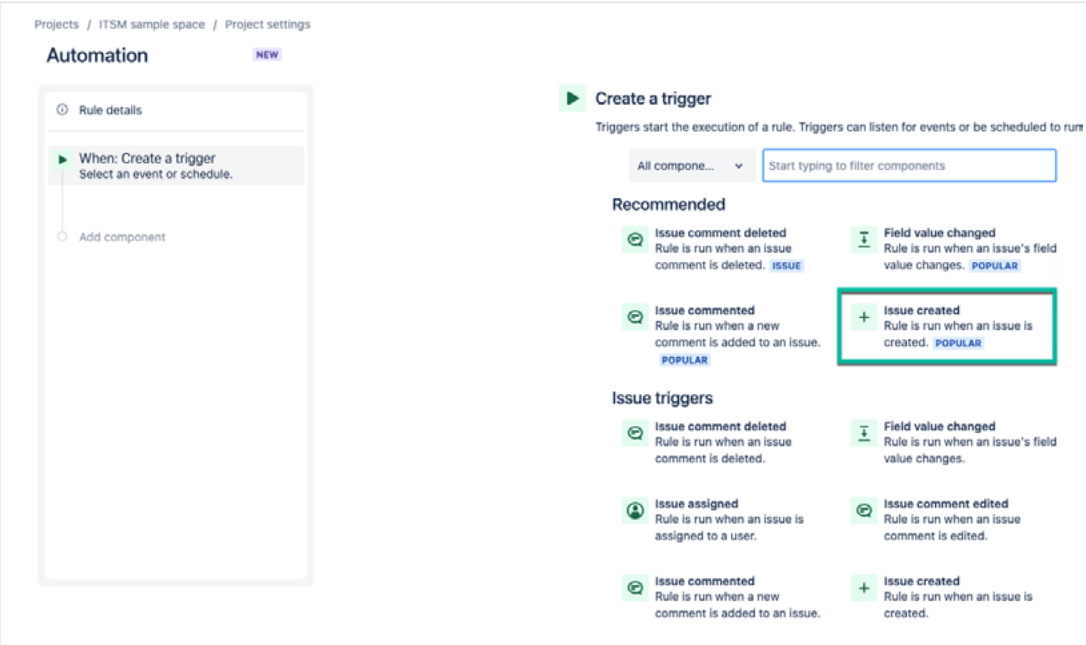
Select your project from the Jira Service Management main navigation bar then select **Project settings** in the service project sidebar.



Select **Automation**, then click the **Create rule** button.



Creating a new hardware request will be the trigger for the automation, so in the **Create a trigger** pane, select **Issue Created**, then click **Save**.



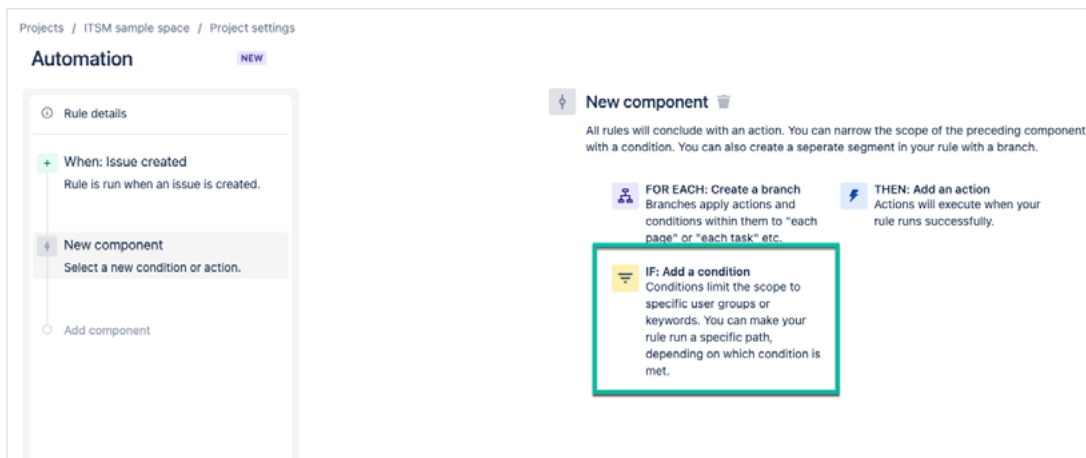


We will add a few conditions for triggering the automation by creating components.

There will be three conditions to trigger the automation to update an asset's status:

1. Request Type = Request new hardware
2. Affect Laptop(s) is not empty
3. Reason for new hardware = Asset lost or stolen

To create the first component, click **IF: Add a condition** in the **New component** pane.



To define the first condition, select **Issue fields condition** in the **Add a condition** pane.

The screenshot shows the 'Automation' interface with a sidebar on the left and a main content area on the right. The sidebar contains a 'Rule details' section with a 'When: Issue created' trigger and an 'If: Add a condition' section. The main content area has a header 'Add a condition' with a trash icon. Below it, a paragraph explains that conditions limit the scope to specific user groups or keywords. A 'Recommended' section lists 'Issue fields condition' as a popular option. An 'All components' section lists various conditions: Advanced compare condition, Affected services condition, AQL condition, Forms attached, IF, ELSE: add condition options, Issue attachments, Issue fields condition (highlighted with a green box), JQL condition, Related issues condition, and User condition.

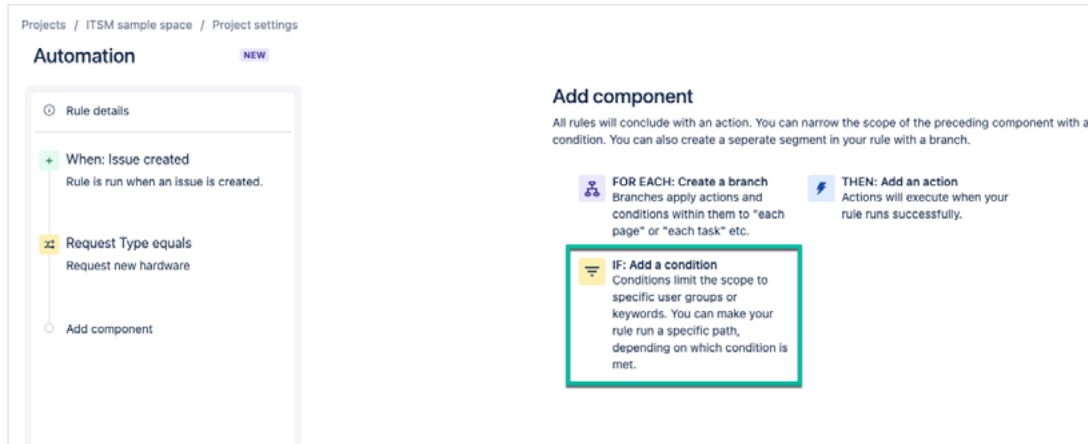
Enter the following data in the **Issue fields condition** pane, then click the **Save** button.

Field	Condition	Value
Request Type	equals	Request new hardware

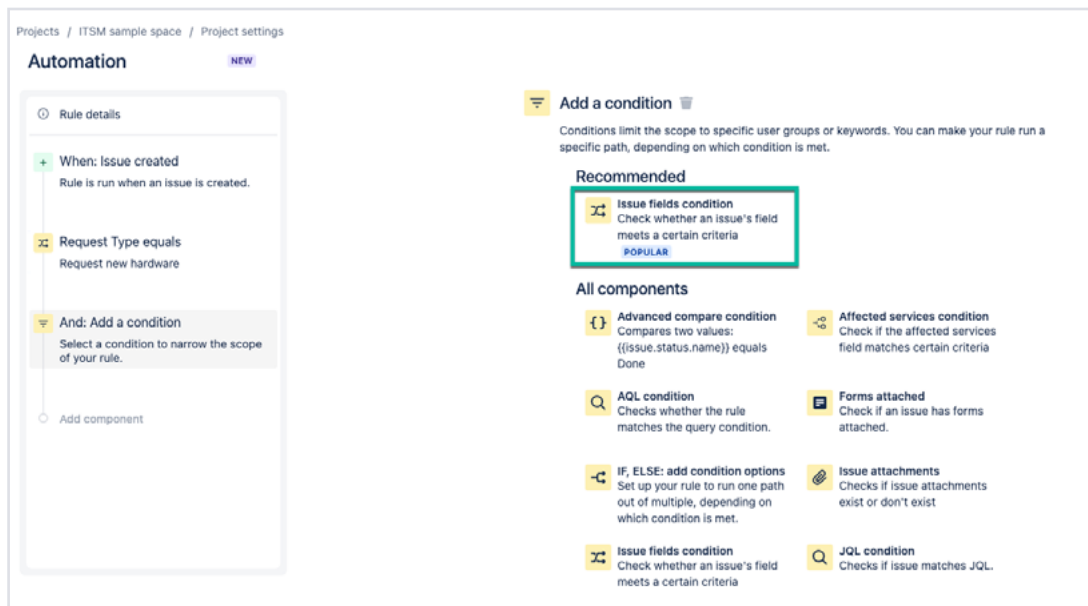
The screenshot shows the 'Automation' interface with the 'Issue fields condition' pane selected. The pane contains a description, a 'Field' dropdown set to 'Request Type', a 'Condition' dropdown set to 'equals', and a 'Value' dropdown set to 'Request new hardware'. The 'Save' button is highlighted in blue.

To enter the second condition, we will add another component then define the condition.

In the **Add component** pane, click **IF: Add a condition**.



In the **Add a condition** pane, click **Issue fields condition**.



In the **Issue field condition** pane, enter the following data, then click the **Save** button.

Field	Condition
Affected Laptop(s)	is not empty

The screenshot shows the 'Automation' section of the 'Project settings' page. On the left, the 'Rule details' pane lists three conditions: 'When: Issue created', 'Request Type equals', and 'Affected Laptop(s) is not empty'. On the right, the 'Issue fields condition' pane is active, showing a dropdown for 'Field' set to 'Affected Laptop(s)' and a dropdown for 'Condition' set to 'is not empty'. A 'Save' button is visible at the bottom right.

To enter the third condition, we will add one more component and define another condition.

In the **Add component** pane, click **IF: Add a condition**.

The screenshot shows the 'Automation' section of the 'Project settings' page. On the left, the 'Rule details' pane lists three conditions: 'When: Issue created', 'Request Type equals', and 'Affected Laptop(s) is not empty'. On the right, the 'Add component' pane is active, showing three options: 'FOR EACH: Create a branch', 'THEN: Add an action', and 'IF: Add a condition'. The 'IF: Add a condition' option is highlighted with a red box.

In the **Issue fields condition** pane, select the custom asset field and enter Condition data, then click **Save**.

Field	Condition	Value
Reason for new hardware	equals	Asset lost or stolen

The screenshot shows the Jira Automation interface. On the left, the 'Automation' pane lists several rules. The rule 'Reason for new hardware equals Asset lost or stolen' is selected. On the right, the 'Issue fields condition' configuration pane is open. It shows the following configuration:

- Field:** Reason for new hardware
- Condition:** equals
- Value:** Asset lost or stolen

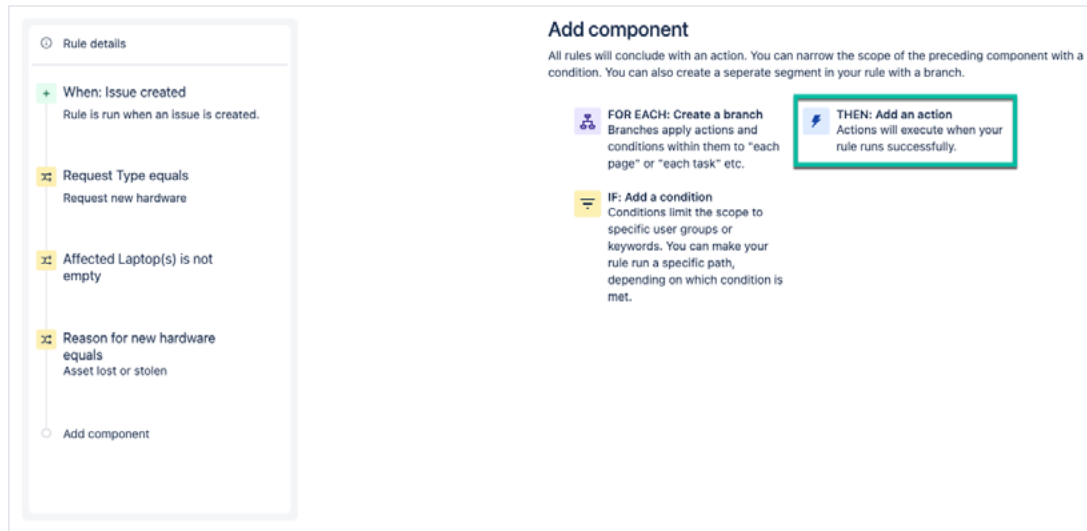
At the bottom right of the configuration pane are 'Cancel' and 'Save' buttons.

## PRO TIP

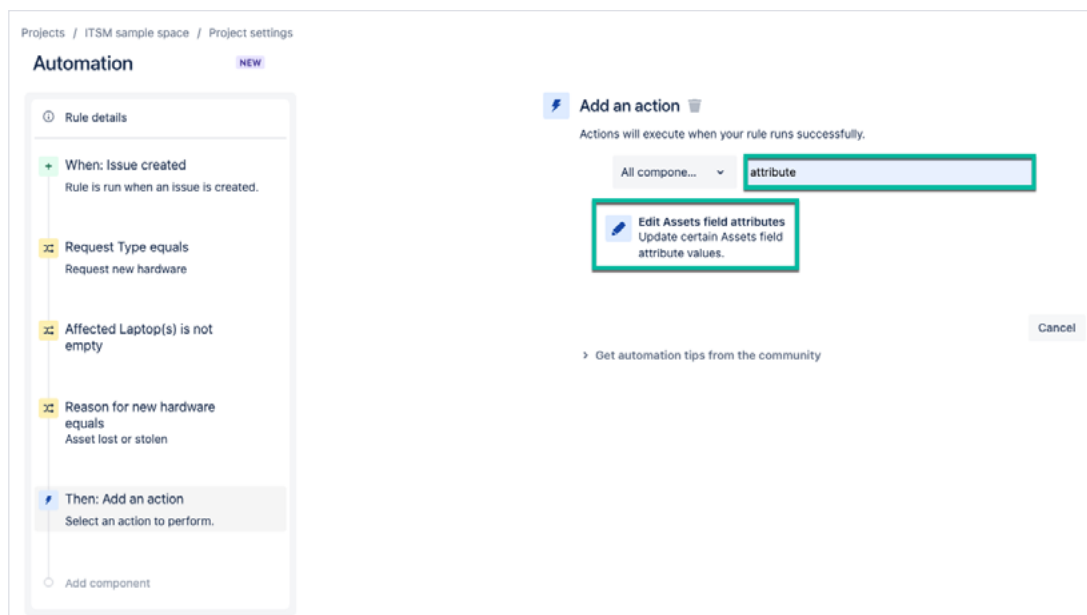
Triggers are a powerful tool for keeping your Jira issues synchronized with **Assets** data. We recommend that you configure triggers within individual project automation (rather than globally) and define specific conditions to ensure the automation rule works reliably and only in expected conditions.

Now that the trigger conditions are defined, we will create the automation action.

In the **Add component** pane, select **THEN: Add an action**.



In the **Add an action** pane, filter on “**attribute**”, then select **Edit Assets field attributes**.



In the **Edit Assets field attributes** pane, **Affected Laptop(s)** is pre-populated as the **Asset field** value, so click on the **Choose attribute to set** option, then select **Asset Status**.

**Rule details**

- When: Issue created**  
Rule is run when an issue is created.
- Request Type equals**  
Request new hardware
- Affected Laptop(s) is not empty**
- Reason for new hardware equals**  
Asset lost or stolen
- Then: Edit Assets field attributes**  
Asset Status
- Add component**

**Edit Assets field attributes**

Set values for attributes on a certain Assets field. Select the Assets field and add the attributes you want to edit.

You can add either a string value, an object id or a smart value in the field.

Assets field\*

Affected Laptop(s)

Choose attributes to set...

asset

**SELECTED ATTRIBUTES**

- ☒ Asset Status

**AVAILABLE ATTRIBUTES**

- ☐ Asset Name
- ☐ Asset Tag

Cancel Save

Enter **Missing** in the **Asset Status** field and click **Save**.

The screenshot shows the 'Automation' configuration page with a rule named 'When: Issue created'. The rule details pane on the left shows the following components:

- When: Issue created** (Trigger): Rule is run when an issue is created.
- Request Type equals** (Condition): Request new hardware
- Affected Laptop(s) is not empty** (Condition): Affected Laptop(s) is not empty
- Reason for new hardware equals** (Condition): Asset lost or stolen
- Then: Edit Assets field attributes** (Action): Asset Status

The 'Add component' button is at the bottom of the rule details pane. The 'Edit Assets field attributes' pane on the right shows the 'Affected Laptop(s)' field selected. The 'Choose attributes to set...' dropdown is open, showing 'asset' as the selected attribute. The 'Asset Status' attribute is checked under 'SELECTED ATTRIBUTES'. The 'Asset Name' and 'Asset Tag' attributes are unchecked under 'AVAILABLE ATTRIBUTES'. The 'Save' button is highlighted.

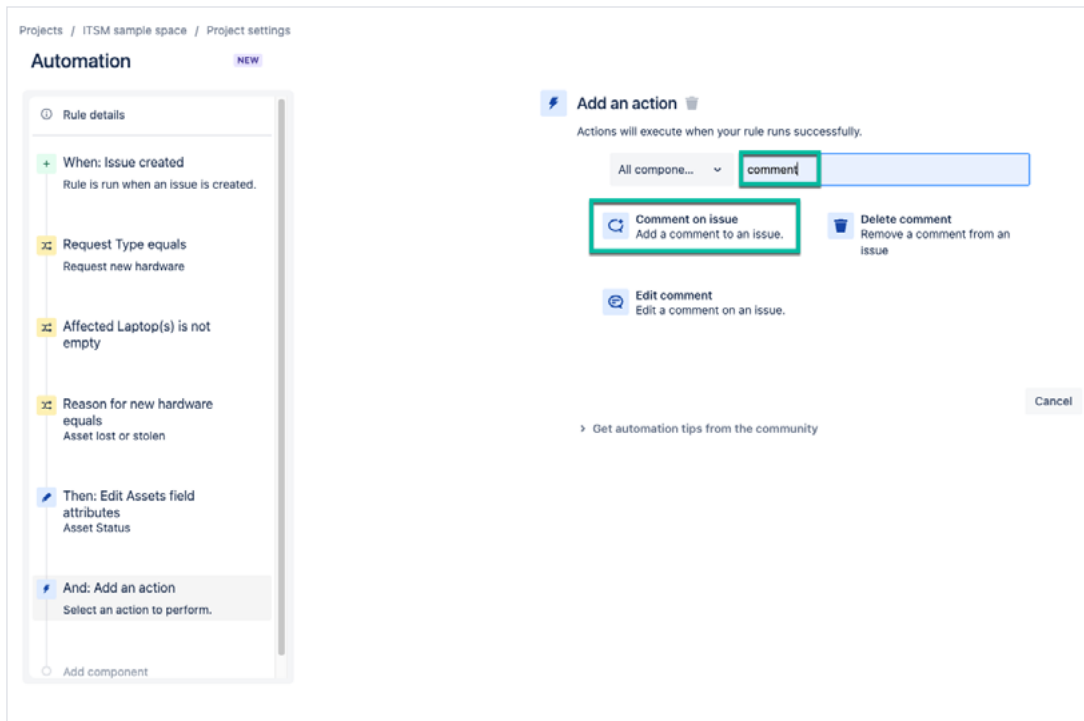
In the **Add component** pane, select **THEN: Add an action**, filter on “comment,” then select **Comment on issue** in the **Add an action** pane.

The screenshot shows the 'Automation' configuration page with the 'Add component' pane open. The rule details pane on the left is the same as in the previous screenshot. The 'Add component' pane shows the following options:

- FOR EACH: Create a branch** (Branch): Branches apply actions and conditions within them to "each page" or "each task" etc.
- THEN: Add an action** (Action): Actions will execute when your rule runs successfully. This option is highlighted with a green box.
- IF: Add a condition** (Condition): Conditions limit the scope to specific user groups or keywords. You can make your rule run a specific path, depending on which condition is met.

The 'OR' button is visible between the 'Add component' pane and the 'Name your automation...' field. The 'Name your automation...' field is empty. The 'Who can edit this rule?' dropdown is set to 'All admins'. The 'Turn it on' button is highlighted.





In the **Comment on issue** pane, enter an informational message, ensure the **checkbox** for *Prevent duplicates by only adding this comment once to a particular issue* is selected, select **Share with customer** in the **Comment Visibility** field, then click **Save**.

### Informational Message Syntax

```
{panel:title=INFO|borderStyle=dashed|borderColor=#ccc|titleBGColor=#F7D6C1
bgColor=#FFFFCE}The stolen/lost laptop '{{issue.Affected Laptop(s).Asset
Name}}' was updated in the IT Assets schema and the Asset Status is set to
Missing.{panel}
```

Projects / ITSM sample space / Project settings

### Automation DRAFT

**ITSAMPLE:Request new hardware-1-Set lost asset to missing status**

Rule details

Audit log

**When: Issue created**  
Rule is run when an issue is created.

**Request Type equals**  
Request new hardware

**Affected Laptop(s) is not empty**

**Reason for new hardware equals**  
Asset lost or stolen

**Then: Edit Assets field attributes**  
Asset Status

**And: Add comment to issue**  
{panel:title=INFO|borderStyle=dashed|borderColor=#ccc|titleBGColor=#F7D6C1|bgColor=#FFFCE}The stolen/lost laptop '{{issue.Affected Laptop(s).Asset Name}}' was updated in the IT Assets schema and the Asset Status is set to Missing.{panel}

**Comment on issue**

Learn more about Comment on issue action

Please enter the comment to add:

Comment \*

{panel:title=INFO|borderStyle=dashed|borderColor=#ccc|titleBGColor=#F7D6C1|bgColor=#FFFCE}The stolen/lost laptop '{{issue.Affected Laptop(s).Asset Name}}' was updated in the IT Assets schema and the Asset Status is set to Missing.{panel}

☒ Prevent duplicates by only adding this comment once to a particular issue.

**Comment Visibility**

Share with customer

Cancel Save

## PRO TIP

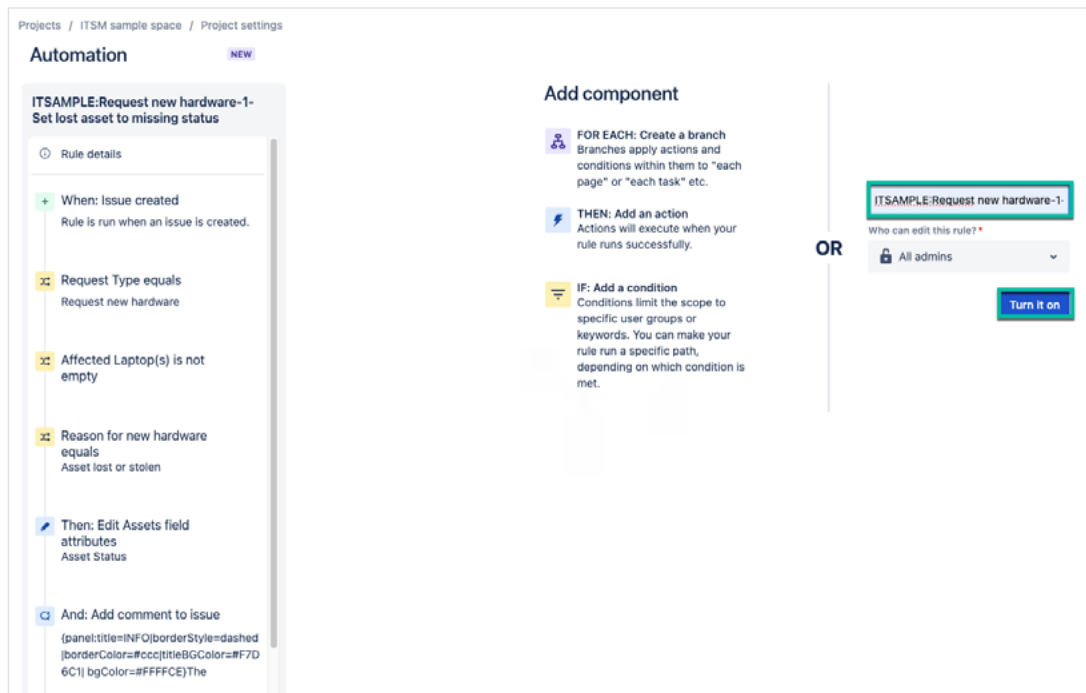
You can create more detailed, informative messages by including Jira smart values. Smart values are placeholders that let you pull in dynamic data. You can use them to access and manipulate almost any issue data from Jira.

For more information about Jira automation and Jira smart values, visit the following links:

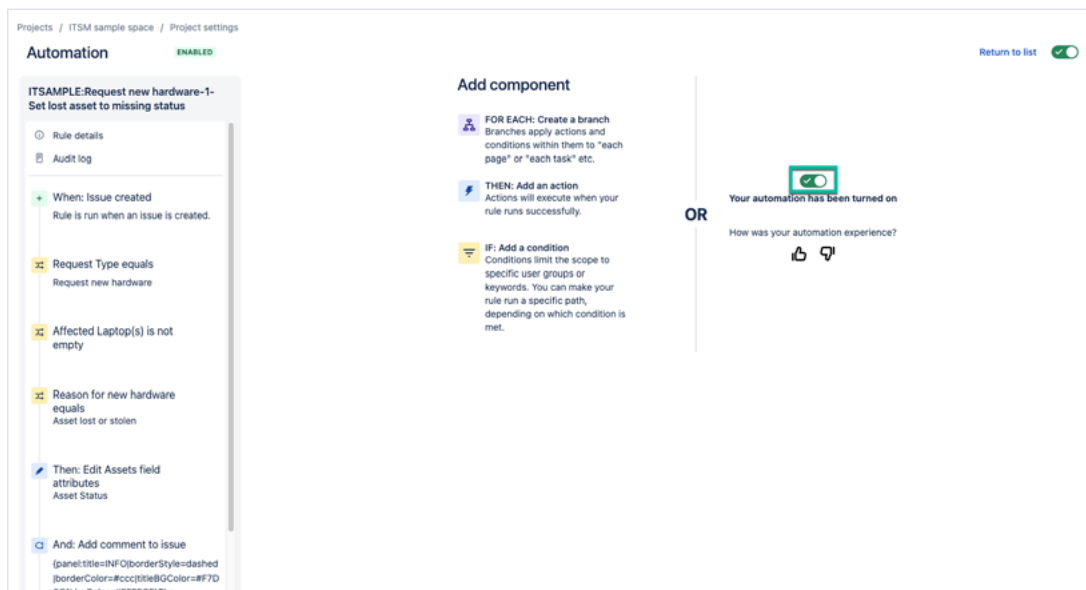
[Automation basics | Cloud automation Cloud | Atlassian Support](#)

[Jira smart values - issues | Cloud automation Cloud | Atlassian Support](#)

The automation rule is complete, so add a name for the automation and click **Turn it on**.



You can activate/deactivate the automation by using the **toggle** control.



## Step 16 - Create a request for an employee laptop

Now you can test the automation by creating a request for an employee, selecting the employee's laptop, and providing a reason for the new hardware request.

Access your customer portal by selecting **Channels** in the service project sidebar and clicking **Portal**.

Note: Ensure you have assigned a laptop asset to yourself before testing the automation.

In the **Help Center**, select **Computers** then click **Request new hardware**.

The screenshot displays the ITSM sample space interface. On the left, a sidebar lists various service project components under categories like Queues, Operations, Knowledge, and Channels & People. The 'Channels' option is highlighted. The main content area shows the 'Open tasks' section with a large red circular graphic and a 'Create a request' button. A 'Channels' configuration panel is open, listing four channels: EMAIL (ENABLED), PORTAL (VISIBLE, highlighted with a green box), WIDGET (OFF), and CHAT (INACTIVE).

Channel Type	Channel Name	Status
EMAIL	EMAIL itsample@falconheavy.atlassian.net	ENABLED
PORTAL	PORTAL https://falconheavy.atlassian.net/s...	VISIBLE
WIDGET	WIDGET Turned off	OFF
CHAT	CHAT Create issues from chat channels	INACTIVE

## ITSM sample space

Welcome! You can raise a request for ITSM sample space using the options provided.

### Contact us about

#### Common Requests

Get IT help, Request a new account, Report a system problem, Report broken hardware, Set up VPN to the office >

#### Computers

Get IT help, New mobile device, Report broken hardware, Request new software, Request new hardware >

#### Logins and Accounts

Request a new account, Fix an account problem, Get a guest wifi account, Set up VPN to the office, Request admin access, Onboard new employees >

#### Applications

Report a system problem, Request a change, Request new software >

#### Servers and Infrastructure

Report a system problem, Report broken hardware, Request a change >

## ITSM sample space

Welcome! You can raise a request for ITSM sample space using the options provided.

Contact us about

Computers

### What can we help you with?



#### [Get IT help](#)

Get assistance for general IT problems and questions.



#### [New mobile device](#)

Need a mobile phone or time for replacement? Let us know.



#### [Report broken hardware](#)

Report hardware that might be faulty or broken e.g. a broken computer screen or a damaged server.



#### [Request new software](#)

If you need a software license, raise a request here.



#### [Request new hardware](#)

For example, a new mouse or monitor.

Enter information in the **Summary** field, select **“Asset lost or stolen”** in the **Reason for new hardware** field, select an **Affected Laptop(s)** value, enter information in the **Why do you need this?** field, then click the **Send** button.

[Help Center](#) / [ITSM sample space](#)


## ITSM sample space

Welcome! You can raise a request for ITSM sample space using the options provided.

[Contact us about](#)


Computers

What can we help you with?



[Request new hardware](#)  
For example, a new mouse or monitor.

Raise this request on behalf of \*

 [Jennifer Fish \(jfish@atlassian.com\)](#)


Summary \*


I need another laptop


What you need this? \*


Normal text


B I ...


















My laptop was stolen and I need another laptop.



Affected Laptop(s)

AT-8022103 Jennifer Fish

Reason for new hardware

Asset lost or stolen

Attachment

Drag and drop files, paste screenshots, or browse


Browse

Send

Cancel

Help Center / ITSM sample space / **ITSAMPLE-25**

# I need another laptop

**Jennifer Fish** raised this on Today 11:05 AM

[Hide details](#)

**Why do you need this?**

My laptop was stolen and I need another laptop.

**Affected Laptop(s)**


**AT-B022103**


**Reason for new hardware**


Asset lost or stolen


**Status**

**WAITING FOR SUPPORT**


 Notifications on

 Escalate


 Resolve this issue


 Cancel request

**Request type**


 Request new hardware


**Shared with**

 **Jennifer Fish**  
Creator

 Share

**Activity**

 Automation for Jira Today 11:06 AM

 **INFO**

The stolen/lost laptop **AT-B022103** was updated in the IT Assets schema and the Asset Status is set to **Missing**

Note: Automation rules may take a couple of seconds to complete, so you may need to refresh your browser screen. You can also view the automation audit logs for more information.

To learn about Jira automation audit logs, visit the following link:

[Atlassian Support | What is the automation audit log?](#)





You can view the issue by selecting the issue ID and see the request details, note about the asset record update, SLAs for issue response and resolution, etc. Additionally, you can click on the asset field **Show details** toggle and see that the **Asset Status** is set to **Missing**.

**ITSAMPLE-25**

### I need another laptop

Create subtask Link issue Add form

Jennifer Fish raised this request via Portal [View request in portal](#) [Hide details](#)

**Description**  
My laptop was stolen and I need another laptop.

**Affected Laptop(s)**

Asset Name	Serial Number	Assigned User	Refresh Date	Asset Status
AT-B022103	C02GHIKQ033Z	Jennifer Fish	Sep 13, 2024	<b>Missing</b>

**Reason for new hardware** Asset lost or stolen

**Similar requests**

**Activity**  
Show: All **Comments** History Work log Approvals Newest first ↓

[Add internal note](#) / [Reply to customer](#)

Pre tip: press **M** to comment

Automation for Jira 4 minutes ago

**INFO**  
The stolen/lost laptop 'AT-B022103' was updated in the IT Assets schema and the Asset Status is set to Missing.

**Waiting for support** [Actions](#)

**SLAs**

SLA	Time to resolution
Tomorrow 11:05 AM	within 8h
Today 11:06 AM	Time to first response within 4h

**Pinned fields**  
Click on the [P](#) next to a field label to start pinning.

**Details**

Assignee	Unassigned
Reporter	Jennifer Fish
Request Type	Request new hardware
Priority	Medium
Urgency	None
Impact	None
Affected services	+ Add service
Pending reason	None

**More fields** Labels, Request participants, Time tracking, Approvals, Organ...

**Automation** Rule executions

Created 4 minutes ago  
Updated 4 minutes ago [Configure](#)

# Appendix

## Checklist of next steps

This list is designed as a high-level overview of next steps to take when embarking on your ITAM and service configuration management journey. By starting small and focused, we've seen organizations implement a valuable asset and/or configuration system in just a few months.

### Build your business case

- ☐ Pick a current business problem that will deliver value to the business if solved. We recommend starting to solve just one or two problems for the first iteration of asset and service configuration management.
- ☐ Assemble a team to tackle this problem. The team members you choose will depend heavily on the business problem.
- ☐ Consider which teams interact with the problem area and pull stakeholders from each relevant team.
- ☐ Choose a sponsor from your organization who is responsible for the outcomes you're trying to improve.
- ☐ Ensure everyone has the same understanding of IT asset and service configuration management.
- ☐ Outline the business problem in detail, how asset and/or service configuration management can help overcome it, and the business outcomes that it will lead to.
- ☐ Define your goals such as reducing mean time to resolve by 10% or increasing customer satisfaction by 15%.
- ☐ Build a business case using the problem statement and goals to get buy-in from stakeholders and budget approval.

## Understand what data you need

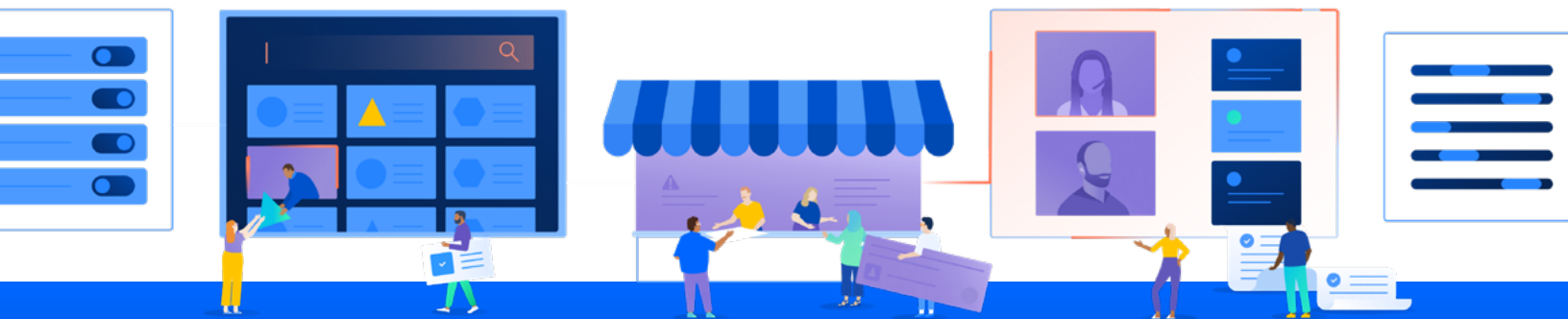
- ☐ Understand what information you need to solve your chosen problem.
- ☐ List relevant asset and CI categories (e.g. laptops, servers, databases) and what information (attributes) you need to know about each category.
- ☐ Understand where that information is located today (e.g. spreadsheets, in people's heads, external databases).
- ☐ Decide what data to leave in its current tool and what should be moved entirely into the CMDB. It's definitely time to leave those spreadsheets behind.
- ☐ Understand which integrations to third party tools or file imports you will need based on the above.
- ☐ Understand how often data is changed to inform how often integrations need to run to keep your CMDB up to date.
- ☐ Understand if any governance, compliance, or audit requirements are required.
- ☐ Do a final check. Does every piece of data have a purpose? If not, remove it.

## Implement

- ☐ Carry out any relevant product training for your team members that will be building, maintaining, and interacting with your chosen tool.
- ☐ Learn about data modeling best practices. There are plenty of resources available, even in-depth YouTube lectures.
- ☐ Map out the structure you want on paper or a whiteboard. Ensure that your chosen structure can support the access permissions you require.
- ☐ Import data and organize it according to your plan. Integrate your assets and CIs with your service desk.
- ☐ Set up relevant automation rules to keep data up to date. Trial and iterate.
- ☐ Audit data periodically to keep it up to date.
- ☐ Select the next problem to solve and continue expanding.

Whether you're already in the Atlassian ecosystem or you're making a switch from legacy CMDB tools, **Assets** in Jira Service Management can help you modernize your asset and service configuration management practices.

To take the next steps in your modernization journey, visit our website and start a free trial of **Assets** in Jira Service Management on our [website](#).



## Further resource

Atlassian's approach to ITSM and ESM:

- [Complete guide to Atlassian's ITSM solution](#)
- [The complete guide to Enterprise Service Management \(ESM\)](#)