Getting into UniDesk’s CMDB

This document does not describe how to *use* the CMDB.

It describes how to get involved, including how to get the help you need, and how to prepare an import file (where required).

# Guide to getting involved

## What is ‘CMDB?’

CMDB stands for Configuration Management Database. It’s a register of information about objects and their relationships.

Configuration Management bears some similarity to the common idea of Asset Management, yet is concerned not only with physical objects, but with any components of a system. Configuration Management also has more of a focus on helping an organization understand the relationships between components, and tracking their configuration.

As a discipline, Configuration Management ties in with Change Management very strongly, but the CMDB can be used to aid decision making in all service management disciplines: a good CMDB can be useful for tracking items and their relationship to incidents, problems, or other items in the CMDB.

## How do I get involved?

There are three stages to getting involved with UniDesk’s CMDB.

* Consultation
* Initial setup
* Prepare import script, and arrange import (where necessary)

# Getting Started

If you’re interested in using the CMDB, put in a request for more information with the IS Helpline. We’ll follow up from there, with the following steps:

## Consultation

In the first instance, someone will arrange to speak with you about what your area wants to get out of CMDB and how you can best achieve that. For example, are you more interested in keeping track of the *relationships* between objects (such as by mapping out large scale infrastructure) or are you more interested in keeping track of a flat range of workstation computers, or all the printers that you manage? And will you benefit from doing regular automated imports from another system, or would it make more sense to enter information manually in UniDesk? We’ll work with you to come up with a solution that makes sense for your situation.

## Initial setup

We’ll take your existing UniDesk Operator(s) and set them up to give them access to the CMDB. It will be up to you to populate CMDB from here – unless you want to run an import from another system.

## Import

An import can be done as a one off to migrate from one system to another, or it can be a regular import from another ‘golden copy’ of your data. We’ll help with getting the import running, provided you can supply the data in the appropriate format.

See below for details of that format!

# How to import items into UniDesk CMDB at Edinburgh

Note: This guidance is for importing Hardware objects. Importing software objects is possible, and much of the import process is the same, although some further consultation is required.

## CSV file

We ask you to provide a correctly named, correctly formatted, CSV file. (Actually pipe delineated, so your text data *can* contain commas).

We will then include this in the hardware import, either as a one-off upload or as a regular update, by agreement.

## Format of CSV files

The following general rules apply to the formatting of the CSV file(s):

* No Header Row: We need to be able to concatenate several files in no particular order.
* Fields should be | (‘Pipe’) delineated, rather than actually comma separated.
* The fields must NOT be enclosed (I.e.: do NOT use single or double quotes to enclose the values of a field e.g.: …|”something”|….)
* Use DOS line endings ( \r\n )
* No content in a field should be longer than the specified value in the ‘Type and size of field’ column
* Numbers will be inserted without any commas or other separators used for grouping of digits. For decimal numbers, a single decimal point (full stop) will be used.
* Use the US-ASCII character set.
* There are 23 fields available in the import and all must be present in each row, although not all need to be populated.

So there are 23 possible fields, laid out as follows:

1|2|3|4|5|6|7|8|9|10|11|12|13|14|15|16|17|18|19|20|21|22|23

And following the rules above, the rows of your CSV file may look something like this:

Machine1--ISAPPS|4|ggranum||Type1|HP|abc||||||||||||||||example

BigServer2--APPS001|2||AT||Server|Windows||||||||||||||||The AT box

W9886986--MCC|2||KB||Server|Scientific Linux||||||||||||||||Dongle

Object ID and suffix

The first field in each row is the unique field used to identify CMDB objects, and is known as the ‘Object ID’ field. This field must always be a unique value. If you already have unique identifiers for Assets or Configuration Items, you can use these, or you can come up with any system that works for you. Note that there is no additional ‘name’ field for Objects in addition to the ID, so the Object ID is the field you will primarily use to identify items.

To ensure uniqueness across the whole system, we ask you to append a suffix to each Object ID. The suffix will be agreed with you during consultation. All object\_id fields must then be of the form: <your object id>--<valid suffix>

The suffix is separated from the main Object ID by two dash characters, with no spaces.

Any rows where the suffix is not in place will be dropped. The system will still attempt to process any records in the file where the suffix is correct.

## Naming of CSV files

The name of the CSV file (the part before ‘.csv’) must match the object id suffix in the file. I.e: a file containing object Ids of the form:

abc-db-at1--APPS001  
abc-db-kb1--APPS001

must have the name

APPS001.csv

We will agree your filename/suffix in consultation with you.

Location Link

This field is mandatory. It is a switch which can be used to determine how the object is linked to the people that use it, or to configurations in the CMDB. If in doubt use the integer ‘6’ for Person.

## Fields in the CSV file

|  |  |  |  |
| --- | --- | --- | --- |
| **Field number** | **Field Name** | **Type and size of field** | **Value of Field** |
| 1 | OBJECT\_ID | 60 characters | Unique user friendly name (e.g. local\_unique\_id (For Edinburgh +’--‘+ unique\_datasupplier\_id)) |
| 2 | LOCATION\_LINK | Integer (1 character) | Use 2 for Configuration, Use 6 for Person |
| 3 | PERSON | 100 characters | Use the UUN of whomever is the user or would most likely be the ‘caller’ for incidents involving this item.  Only where the LOCATION\_LINK field has value ‘6’. |
| 4 | CONFIGURATION\_ID | 30 characters | Only where the LOCATION\_LINK field has value ‘2’. |
| 5 | BUDGET\_HOLDER | 60 characters |  |
| 6 | OBJECT\_TYPE | 30 characters | Mandatory field. |
| 7 | MAKE | 100 characters | E.g. Canon |
| 8 | MODEL | 50 characters |  |
| 9 | SPECIFICATION | 60 characters |  |
| 10 | SERIAL\_NUMBER | 100 characters |  |
| 11 | MAC\_ADDRESS | 30 characters |  |
| 12 | ORDER\_NUMBER | 30 characters |  |
| 13 | SUPPLIER | 60 characters |  |
| 14 | PURCHASE\_DATE | Date, written as dd/mm/yyyy |  |
| 15 | WARRANTY\_EXPIRES | Date, written as dd/mm/yyyy |  |
| 16 | INSURED\_UNTIL | Date, written as dd/mm/yyyy |  |
| 17 | PURCHASE\_PRICE | 8 digits, 2 decimals |  |
| 18 | RESIDUAL\_VALUE | 8 digits, 2 decimals |  |
| 19 | DEPRECIATION | 4 digits | Amount of months |
| 20 | STATUS | 30 characters | Use the status "Archived" to automatically archive items.  Archiving information is the responsibility of the data provider. |
| 21 | IP\_ADDRESS | 40 characters |  |
| 22 | HOSTNAME | 50 characters |  |
| 23 | NOTES | Text field, size unlimited |  |

Filename: Your filename

All fields specified in the table below are mandatory in the hardware CSV files.

The fields MUST appear in the same order as in the table below

The fields in the table below are ordered so that Mandatory ID and linking fields are early in the line and the free text based field:

The Notes field is late in the line. This should help to make the CSV files be ‘human readable’).

Non-mandatory fields should be left empty if no value exists but MUST exist in the CSV file e.g.: value 1|value 2||value 4.