



EXIN ITAMOrg IT Asset Management Foundation

Workbook

Edition 201711



ITAMOrg
IT ASSET
MANAGEMENT

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Introduction

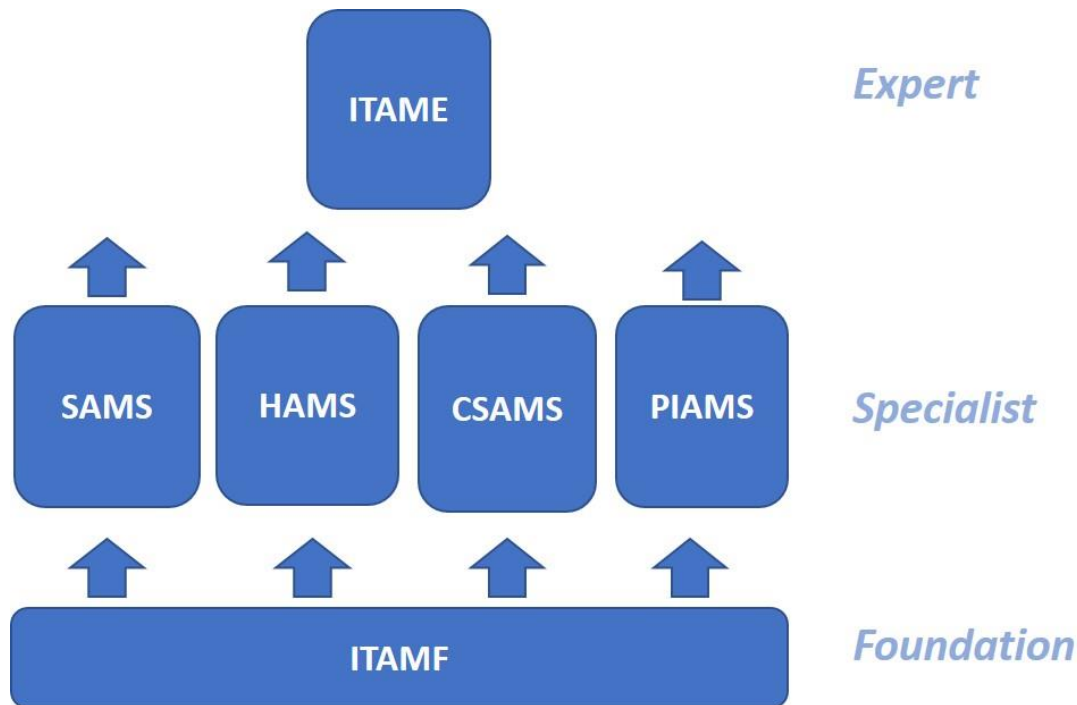
IT Asset Management Foundation (ITAMF.EN) is a certification that validates a professional's knowledge on managing the IT assets as part of an organization's strategy, compliance and risk management. The content covered by the certification is based upon the philosophy of ITAMOrg, a membership organization and thought leader in IT Asset Management.

The certificate IT Asset Management Foundation is part of the EXIN ITAMOrg qualification program and has been developed in cooperation with international experts in the field.

This workbook will help you prepare for the IT Asset Management Foundation (ITAMF.EN) exam and provides you with an overview of the four key areas of IT Asset Management: Hardware Asset Management, including "mobile devices"; Software Asset Management; Services & Cloud Asset Management and People & Information Asset Management, including "Bring Your Own Device".

The exam consists of 40 multiple choice questions with a pass mark of 65%. In this workbook, you will find several sample multiple choice questions, and to help increase your knowledge about IT Asset Management we have also included so-called "*get it*" questions. You will find these questions at the end of each chapter. The exam requirements are specified at the beginning of each chapter, and the weight of the different exam topics is expressed as a percentage of the total.

EXIN exam context



Source: EXIN ITAMOrg IT Asset Management Foundation preparation guide 201607

Target group

IT Asset Management Foundation is intended for all key personnel in the organization involved in the IT lifecycle. Whilst this certification has an IT focus, it has been specifically designed for non-IT personnel in mind.

Specific roles/responsibilities could include (but are not limited to):

- General/business management
- IT Manager
- Procurement Manager
- Financial Manager
- IT Operations Manager
- Project Manager
- Process Manager
- Contract Manager
- Risk Manager
- Business Continuity Manager
- Security Manager

Competences

e-Competence Framework (e-CF)

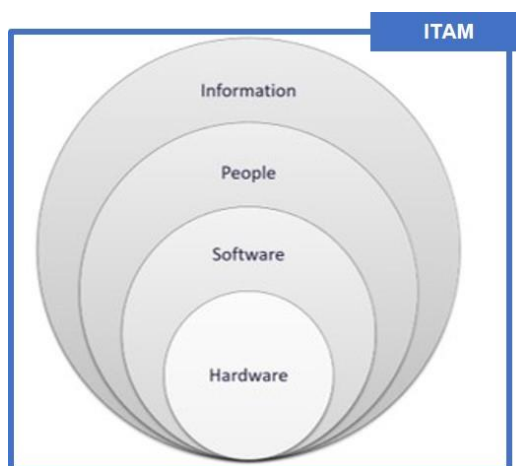
e-CF Area		e-Competence	Level	Coverage
BUILD	B.5	Documentation Production	e-1	Superficial
ENABLE	D.4	Purchasing	e-2	Superficial
	D.8	Contract Management	e-2	Partial
MANAGE	E.3	Risk Management	e-3	Partial
	E.4	Relationship Management	e-3	Superficial
	E.5	Process Improvement	e-3	Superficial
	E.6	ICT Quality Management	e-2	Superficial
	E.8	Information Security Management	e-2	Superficial

Introduction to IT Asset Management (ITAM):

Exam requirements

1. Introduction to IT Asset Management (ITAM)		10%
1.1	Definition and goal of ITAM	
1.2	Standards and best practices	
1.3	ITAM models	

1. Introduction to IT Asset Management (ITAM)



1.1 Definition and goal of ITAM

1.1.1 Defining ITAM

Information Technology Asset Management (ITAM) is the strategic management of IT-related assets throughout their lifecycles and is compiled of several best practice and business practices.



Figure 1: The ITAM lifecycle

ITAM is a set of business practices aligning financial, contractual and inventory areas to support the strategic decisions for the IT environment.

IT assets are all aspects of Technologies: software, hardware, people and information (documentation like contracts and services) used in a business.

Information Technology Asset Management (ITAM) knows four key areas:

Hardware Asset Management (HAM); Management of the physical components of computers, mobile devices and networks from acquisition, implementation, process adjustments, deployment to disposal.

Software Asset Management (SAM); Managing the complete lifecycle of every software asset, involving cost control, documentation, licensing, redistribution, maintenance etc.

Service and Cloud Asset Management (SEAM); SEAM is the management of the multiple platforms across physical, virtual and cloud environments with respect to the organizational needs in terms of storage, data protection, policies and availability.

People & Information Asset Management (PINAM); This discipline regards both people and information (data) as assets. The management of People and Information refers to data security, access policies and best practices with regard to knowledge and information sharing.

IT Asset Management ECO system

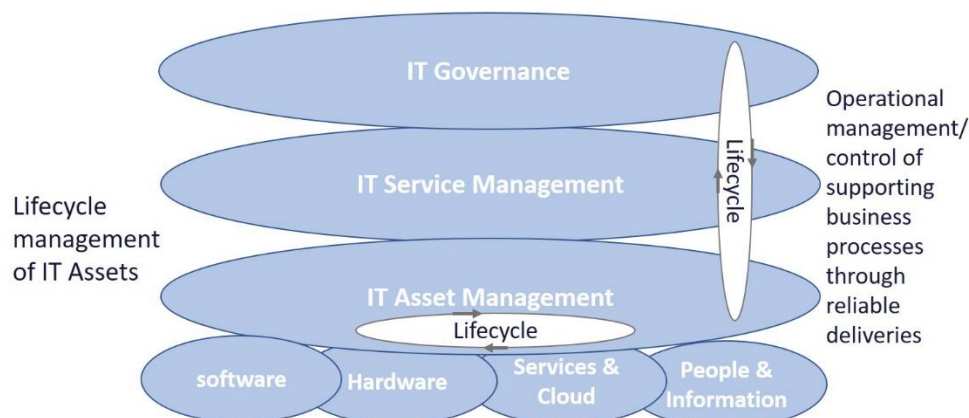


Figure 2: Positioning of ITAM

In the IT Asset Management ECO system, the best practice process framework closest to IT Asset Management (ITAM) is IT Service Management (ITSM; i.e. ITIL® & ISO/IEC 20000).

1.1.2 The purpose and objectives of ITAM

The four key objectives of IT Asset Management are value creation, alignment, leadership and assurance.

Value creation

Principles that support staying in compliance, i.e. 'avoiding value destruction' are risk management, effectiveness, efficiency, value innovation and avoiding disruptive change.

Leadership

Principles that support leadership are promoting a positive workplace culture, define clear roles and responsibilities (including matching authorities), creating awareness and involvement of all stakeholders.

Assurance

It needs to be made clear that assets fulfill a purpose and are connected to organizational objectives. This must be supported by implementing proper processes, embracing the principle of continual improvement and providing necessary resources.

Alignment

Alignment is made possible by creating an IT Asset Management ECO system. The best practice process framework that is closest to ITAM, and has many overlap areas with ITAM is IT Service Management (ITSM).

Benefits

The benefits of Information Technology Asset Management are:

- Improving the efficiency of existing resources
- Financial management of IT-assets
- Information security
- Compliance with legislation, regulations and standards
- Creating awareness of IT-business and strategy
- Enable knowledge and decision making based on up-to-date information
- Goals, motivations and drivers of in- and external stakeholders

ITAM Stakeholders: who needs to be involved?

For ITAM to become successful it is key to involve stakeholders across the organization, and on all levels. Examples of ITAM stakeholders are: business and IT management, legal and commercial, procurement, the financial department, IT operations and 'last but not least' end-users. Creating awareness and sharing knowledge with all stakeholders is indispensable. There also needs to be a good balance between the IT asset strategy and the needs of the organization. ITAM helps to overcome typical issues like having no long-time planning causing unnecessary expenses.

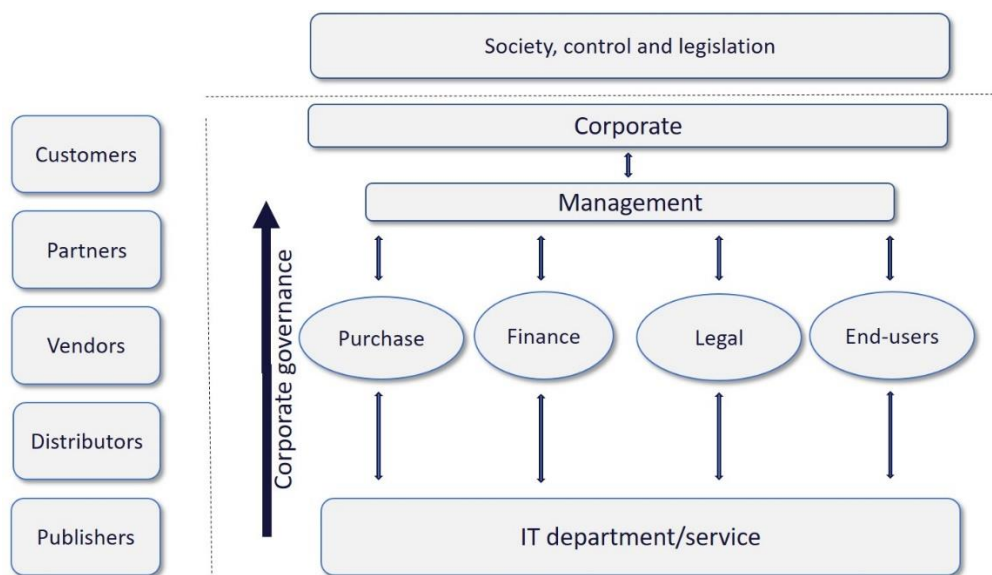


Figure 3: ITAM ECO system Stakeholder map

Apart from all internal stakeholders mentioned above there are also various external stakeholders. Modern organizations are not isolated from the world. Apart from the obvious ones like vendors and customers we also need to consider (local) government (general legislation) and governmental authorities governing all kinds of regulations. Furthermore, society has expectations with regard of the environment and social entrepreneurship. The figure above provides a concise map of stakeholders.

Stakeholder roles and responsibilities (summary)

Stakeholder	Focus areas
Society	Legislation, regulations, directives, environment
Board of directors /corporate governance	owners/shareholders, strategy/mission/vision, long term business planning, business value, financial, corporate governance
Management	budgets/specific financial goals, implementation of strategy, process governance
Finance/purchase	planning and controls of costs, budgets, financial forecasts, day-to-day financial processes, contacts negotiations and agreements
Legal	Legal management of contracts, ensuring adherence to regulations and directives, management of IPR
End-users	Users of IT and other business resources who wish to realize business goals and value. These stakeholders demand more from IT than in the past; e.g. Unified communications and collaboration (UCAC) and Bring your own device (BYOD)
IT	IT strategy and planning, IT processes management, IT service portfolio
Customers	requirements: Privacy and data protection, user friendly solutions, value-for-money, service support
Partners	Data sharing, information security
Vendors/distributors	Sales of (supporting) solutions
Publishers	Copyright, licensing, IPR

The 'Bermuda Triangle' of ITAM

In the section above we have seen that cooperation between stakeholders is a crucial aspect of ITAM. Another one is maintaining a balance between Requests, Purchasing and Deployment of assets. In ITAM this is called the 'Bermuda Triangle'. The three areas mentioned here are governed by different departments or stakeholders, each with their own objectives and needs. When ITAM does not control the interaction between the three, a nasty storm may start brewing within the organization and 'sink' the ITAM ship.

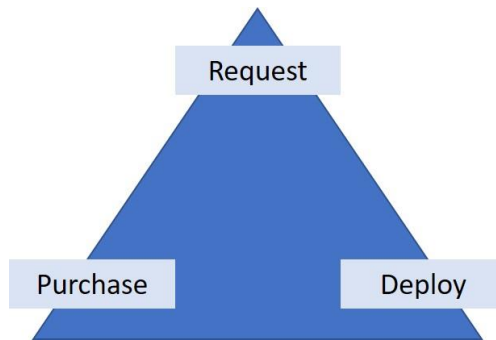


Figure 4: The ITAM 'Bermuda Triangle'

Different instruments can help ITAM to maintain control like: a predefined IT catalogue, service portfolios, a well maintained CMDB to ensure new introductions do not negatively affect the existing infrastructure, purchasing policies and procedures, management of licenses, etc.

1.2 Standards and best practices

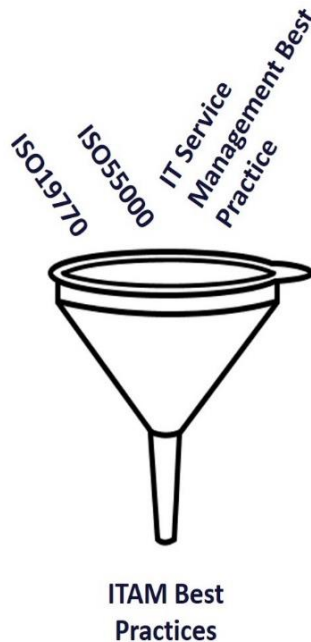


Figure 5: ITAM best practices

1.2.1 ITAM best practices and related international standards

ISO/IEC 19770 family

Information technology -- Software asset management & IT asset management

Parts of the 19770 family:

- 19770-1: Processes and Tiered Assessment of Conformance; Establishes a baseline for an integrated set of processes for Software Asset Management (SAM), divided into tiers to allow for implementing them and achieving recognition.
- 19770-2: Software Identification Tag; establishes specifications for tagging software to optimize its identification and management.
- 19770-3: Software Entitlement Tag; establishes a set of terms and definitions which may be used when discussing software entitlements (an important part of software licenses). It also provides specifications for a transport format which enables the digital encapsulation of software entitlements, including associated metrics and their management.
- 19770-5: Introduction and Vocabulary; provides an overview of the ISO/IEC 19770 family of standards, an introduction to IT asset management (ITAM) and software asset management (SAM), a brief description of the foundation principles and approaches on which SAM is based, and consistent terms and definitions for use throughout the ISO/IEC 19770 family of standards.

Other parts are presently under construction, and ISO.org has also launched a self-assessment tool for software asset management. *(Source: ISO.org)*

ISO 55000

Asset management -- Overview, principles and terminology

- ISO 55000 is the first set of International Standards for Asset Management.
- Enables an organization to achieve its objectives through an efficient, consistent and sustainable management of its assets.
- Provides an overview of asset management, its principles and terminology, and the expected benefits from adopting asset management.

IT Service Management (ITSM) best practice

ITIL

- The most widely accepted approach to IT service management in the world.
- Provides a cohesive set of best practices, drawn from the public and private sectors internationally.
- Aligns IT services with the needs of business through a set of practices each covering an area of the service management lifecycle.
- Allows the organization to establish a baseline from which it can plan, implement and measure.

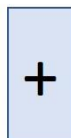
ISO/IEC 20000

ITIL is mapped in ISO/IEC 20000. This recognizes the way that ITIL can be used to meet the requirements set out for ISO/IEC 20000 certification and the interdependent nature with ITIL.

In the context of ITAM we can use the following metaphor to describe the relationship between ITAM and ITSM.

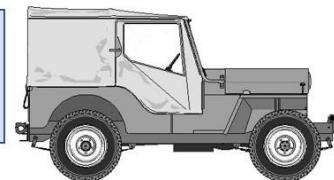
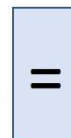
IT Asset Management

The complete car body is constructed using 'assets' that run through the lifecycle from planning to purchase, running the car all the way up to disposal in accordance with regulations.



IT Service Management

IT Service management best practices forms the engine that keeps the lifecycle process running. (many cars use engines from another manufacturer).



1.2.2 Requirements for the management of assets

IT Assets are highly inter-connected, and their value is realized by their combined performance within complex systems. IT assets require different types of decision making at each different level of management in the organization. The following figure shows these different levels of asset management and their requirements.

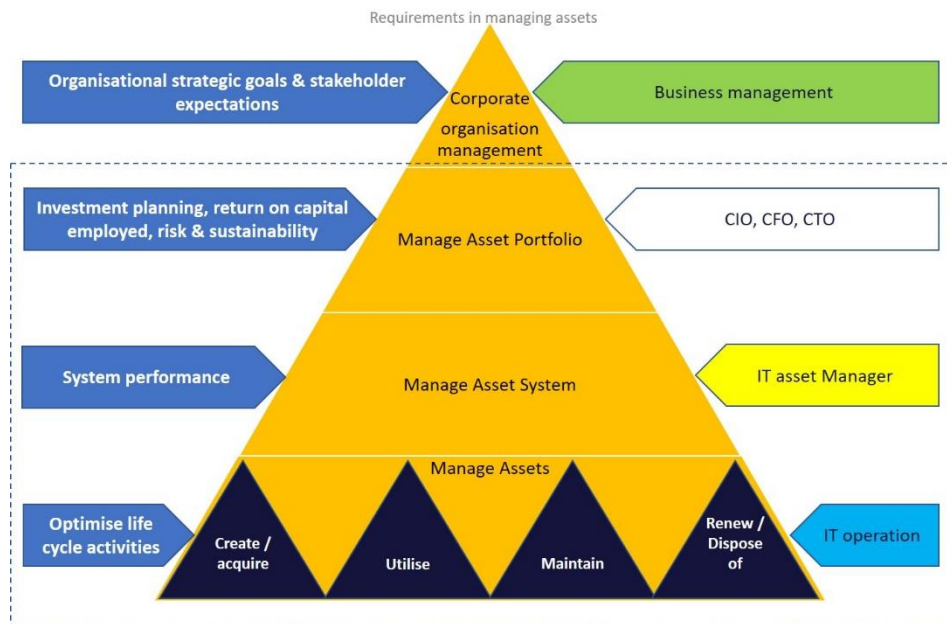


Figure 6: ITAM requirements for the management of assets

An ITAM management system: a basic structure

An ITAM management system needs to be implemented in order to overcome typical hurdles in the organization like short term vision, budget protectionism, departmental silos with conflicting priorities and firefighting instead of looking for structural improvements. A good ITAM management system enables alignment of business goals with day-to-day operations, culture change, proactive and collaborative behavior. The following figure shows the minimum requirements for an ITAM system.



Figure 7: ITAM basic management system

1.3 ITAM models

1.3.1 The ITAM process framework

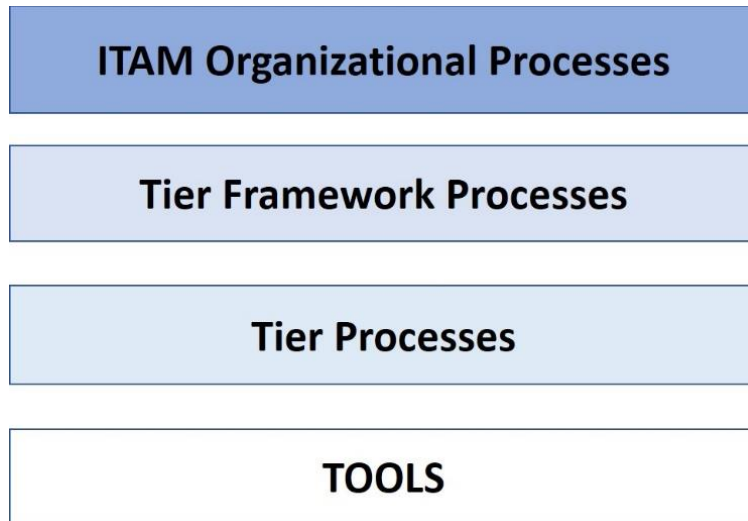


Figure 8: ITAM Process framework

Legend:

Organizational Processes		
<ul style="list-style-type: none"> • Management responsibility • Policies and procedures • Roles & responsibilities 	<ul style="list-style-type: none"> • ITAM planning; Implementation of ITAM • ITAM Continual improvement; Monitoring and review of ITAM 	<ul style="list-style-type: none"> • ITAM Continuity & availability management • ITAM Corporate Governance Management

Tier Framework Processes		
<ul style="list-style-type: none"> • ITAM Planning; Business case, Risk Assessment, Scope, Plan, Gap analysis 	<ul style="list-style-type: none"> • Communication 	<ul style="list-style-type: none"> • Competence, awareness & training