

IT Asset and Service Configuration Management in Jira Service Management



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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. The 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, layout 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:

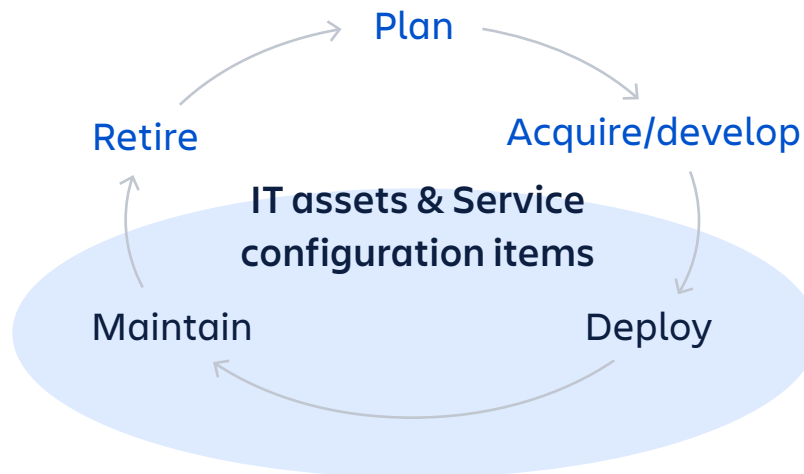
- Laptops
- Servers
- Virtual machines
- Software
- Network adapters
- Databases

Just like with assets, configuration items can expand beyond IT.
Examples include employees, procedure documents, vendors, and more.

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

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 and making sure we keep track of our very important stuff, make 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 don'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 fire fighting. 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.

Link

[Qualys Response to ProxyNotShell Microsoft Exchange Server Zero-Day Threat Using Qualys Cloud Platform](#)

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.

Link

[Software Glitch Halts Trading on New York Stock Exchange](#)

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.

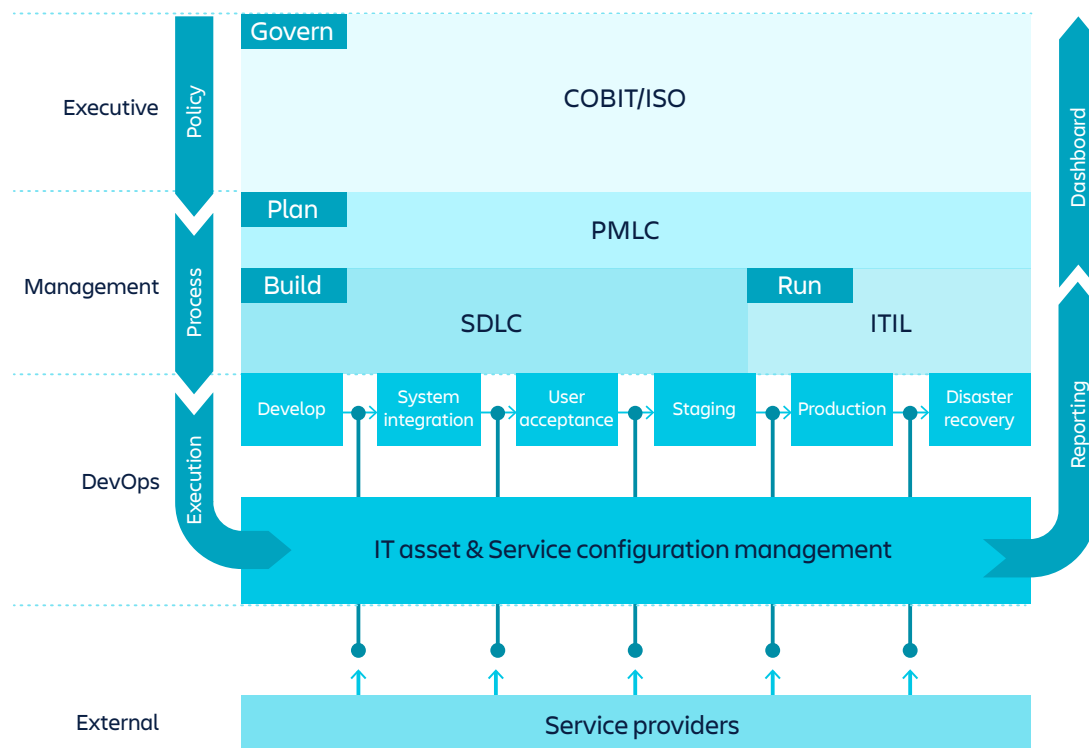
ITSM continues to evolve to meet changing business demands and now comprises flexible and user-friendly service management solutions that support both IT as well as non-IT use cases. Hence, an integrated approach to Enterprise Service Management (ESM) becomes more important than ever. ESM uses ITSM principles 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 of course 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 critical to think through how you plan, build, run and govern processes and handoffs. When ITIL, ITSM, and DevOps approaches are combined, teams expand their focus from development and delivery of new features to also include the ongoing performance of that functionality when in live operation and the customer value the capability provides.

And all these practices depend on a reliable, accurate source of asset and service configuration data to accomplish 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 from their CMDB implementations and have even experienced failed CMDB projects. They're not alone. According to a [Gartner report](#), 75% of CMDB initiatives fail.¹ 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.

Accurate information regarding system assets and configurations improves request fulfillment, service delivery, audit processes, as well as software development and debugging. A [Forrester report](#) emphasized the benefits of

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

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 for 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 provide 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". At 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.

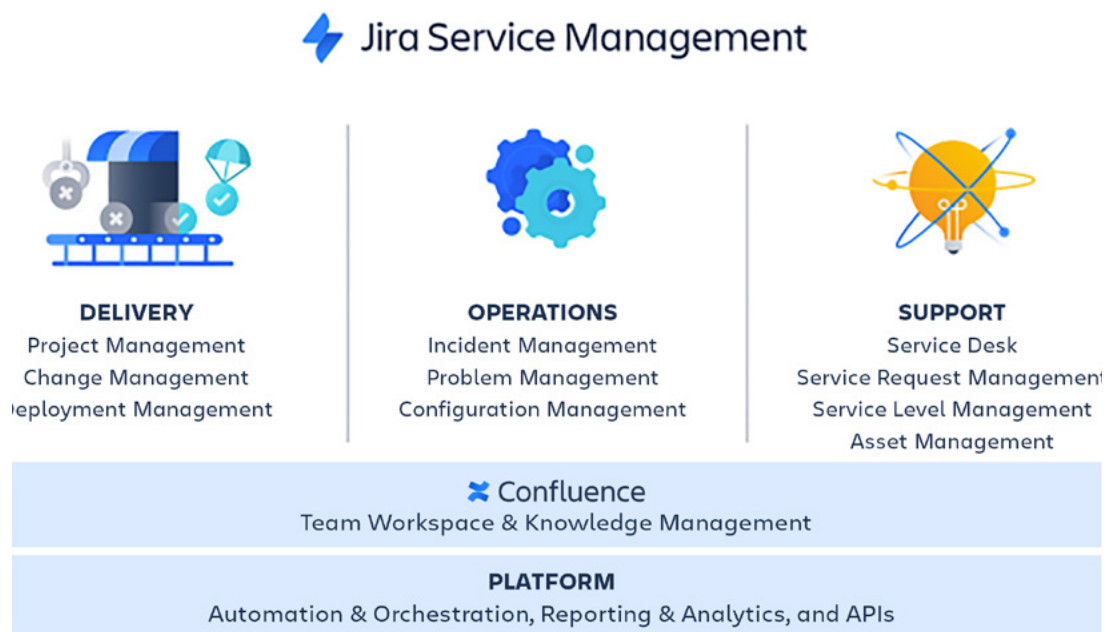
Because the technology landscape is constantly evolving with adoption of new tools, our IT asset and service configuration management capabilities need to continuously improve and adapt to changing operational/business needs. And given the dependency on organizational collaboration, agile capabilities 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.



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, 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 aids with planning, audits, and compliance
- Manage assets outside of IT, including in HR, sales, legal, facilities, and other functions

The best performing IT teams typically use the following practices.

EMBRACE A TEAM-CENTRIC APPROACH

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. Atlassian found that establishing a culture around collaboration and transparency is the foundation to 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. 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." ² 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. 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!

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



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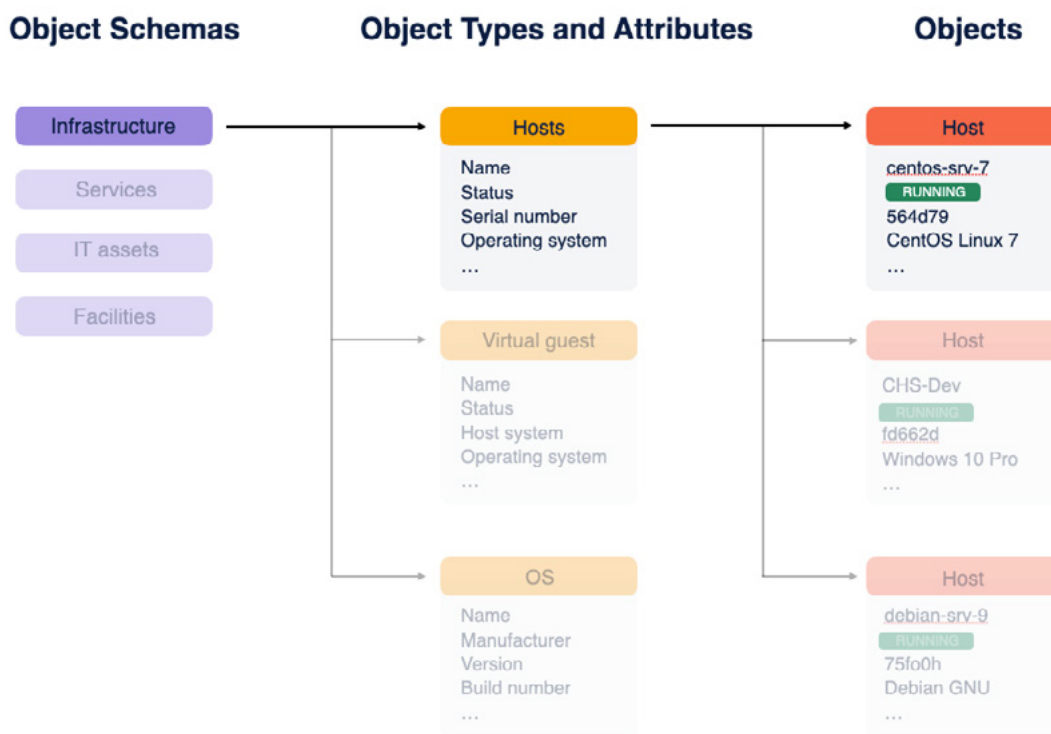
Navigating **Assets** in Jira Service Management

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 Jira Software.

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



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

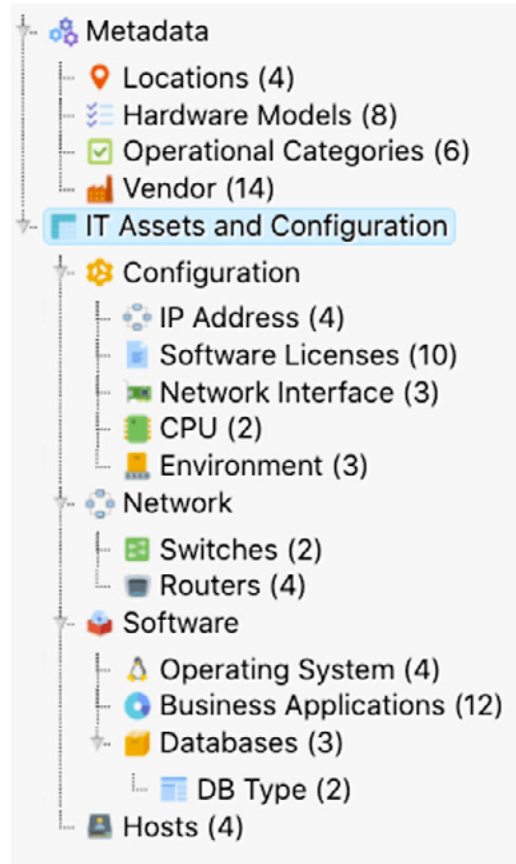
An object type groups objects that use the same kind of information, conveyed through their common attributes. Rather than a single PC, your object types would be Computers, Hardware, Software, Employees, and so on. You can create as many different object types as you like, and then group your various 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, you should:

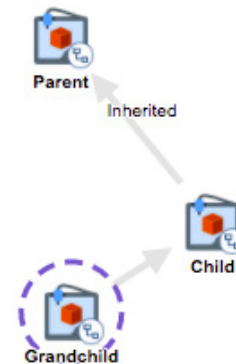
- Use unique object type names within an object schema.
- Use less than 30 object types in an object schema when possible. This will simplify the screen and make maintaining the data easier.

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 “inherit” the fields from its parent.

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

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, datetime, 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 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 of attributes values that can be associated to the attribute. This is common when you need to set an attribute multiple choices or required / mandatory.

Validation - Validate attributes of default type "Text", "Email" & "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. 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

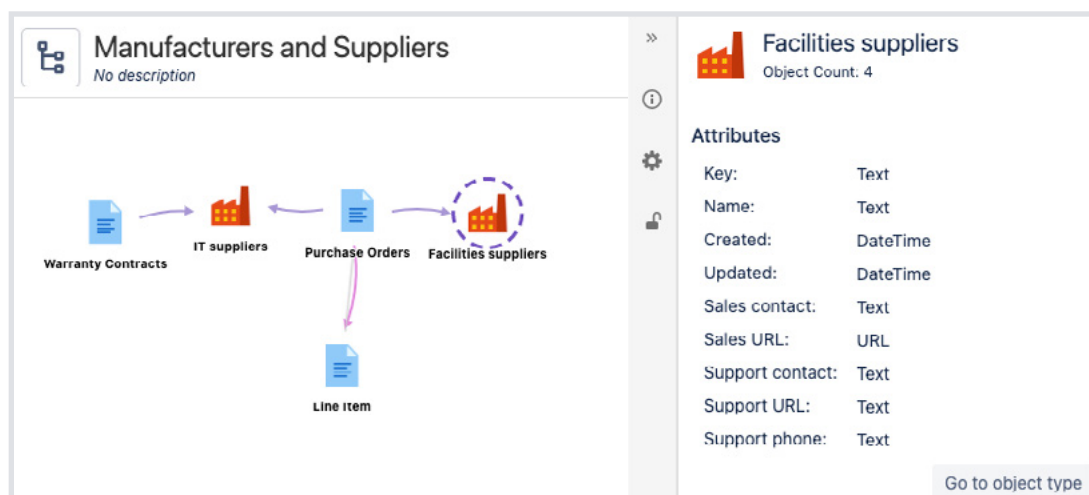
Objects are your actual assets or CIs. Every object is a digital representation of anything that you're mapping, be it a specific computer, employee, office they work at, or even a license for your software. You can create as many objects as you like, and group them within object types that represent 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.

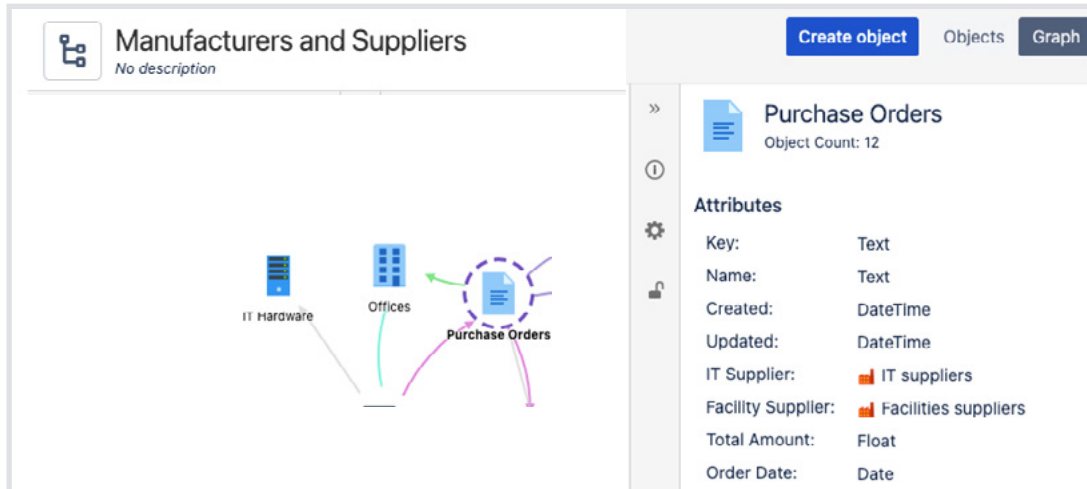
Reference

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.

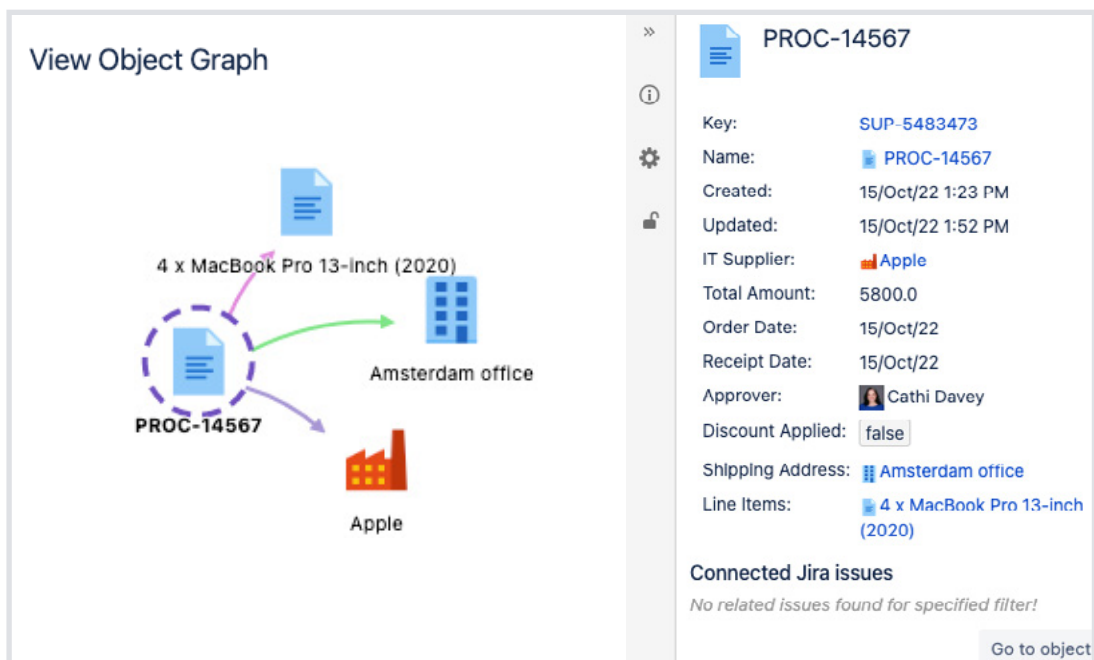
Object schema graph - see how all object types are knitted together.



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



Object graph - see an object's relations with other objects and 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 towards 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
8	Disposed	Asset is disposed and removed from accounting records	Inactive	Delete
9	In Stock	Asset is stored in a stockroom or maintenance room but not in use	Pending	Delete
10	In Transit	Asset is being transported	Inactive	Delete
11	In Use	Asset is deployed and in use	Active	Delete
12	Missing	Asset is not found in its expected location	Inactive	Delete
13	Ordered	Asset is ordered but not in stock	Inactive	Delete
14	Retired	Asset is deployed but no longer in use	Inactive	Delete

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

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 which 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 towards 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

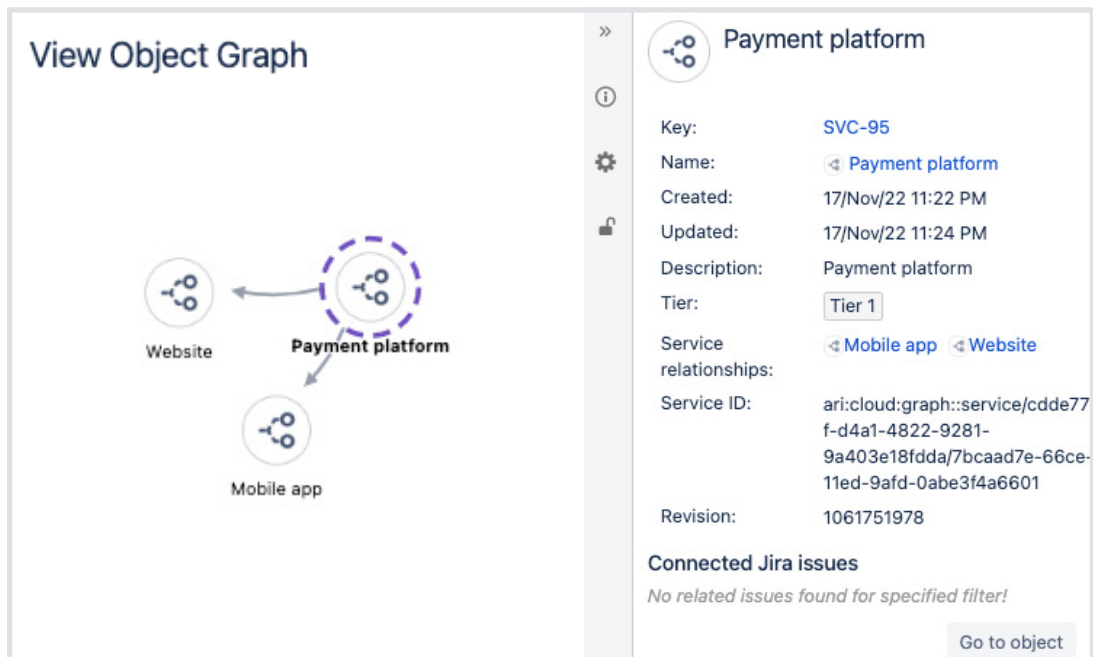
In ITSM, a service is a system, platform or infrastructure that provides value to your business or customers. Services can include things like payment platforms, servers, teams of people (for example, a legal team), websites, products, or application stacks.

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.

Link

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



Assets custom fields

In addition to the service registry, you can create **Assets** custom fields which 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 service request interface. The main title is "Setup a new hire, Sean Dula, with equipment and access". Below this, there are sections for "New Employee" (Sean Dula), "Due date" (Nov 18, 2022), and "Supported Laptop Models". A custom field "MacBook Pro - 13 Space Gray" is highlighted with a green box. This field contains a table with the following data:

Name	MacBook Pro - 13 Space Gray
Manufacturer	Apple
CPU	i9 8-core 2.3GHz
Cost	1299.0

On the right side of the interface, there are sections for "SLAs" (Time to first response within 4h, Time to resolution within 8h), "Pinned fields" (Click on the pin icon next to a field label to start pinning.), and "Details" (Request Type: Setup new employee, Affected services: + Add service, Priority: Medium, Assignee: Alana Grant).

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.

Link

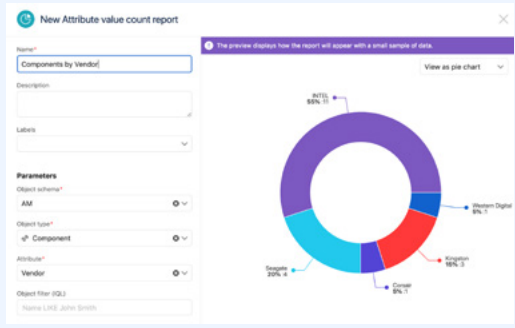
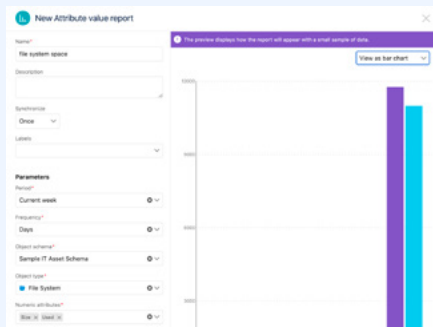
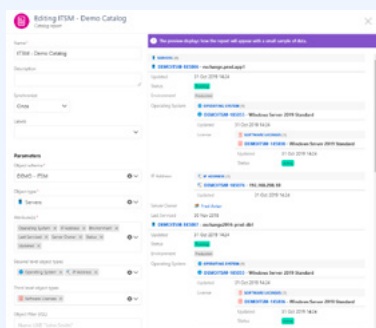
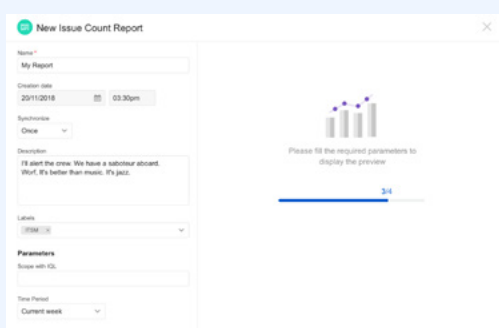
[What is the Assets objects field? | Jira Service Management Cloud | Atlassian Support](#)

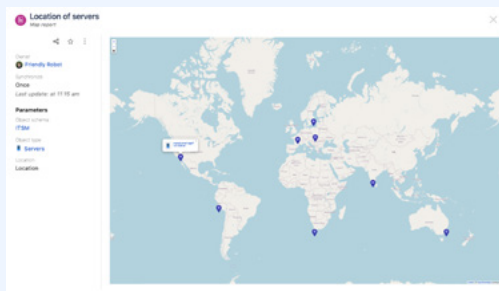
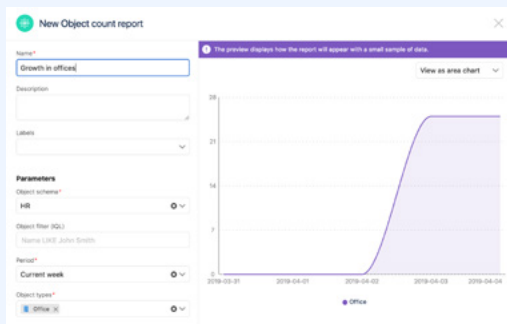
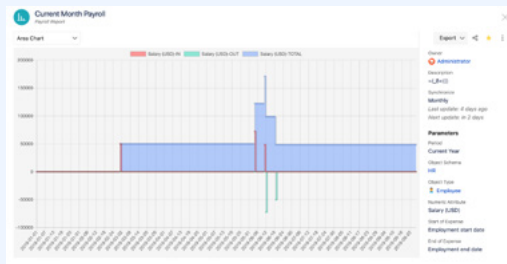
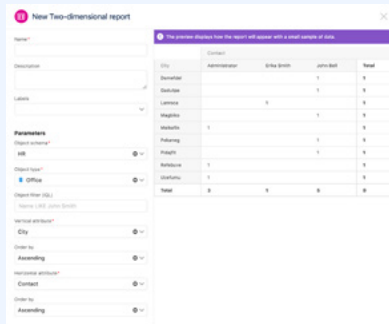
Assets reports

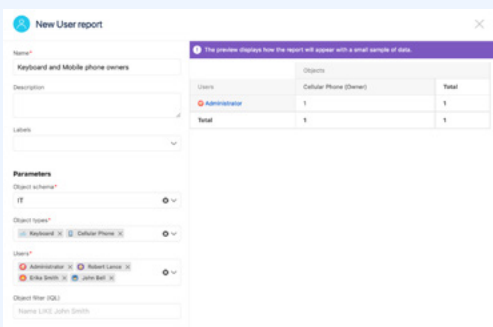
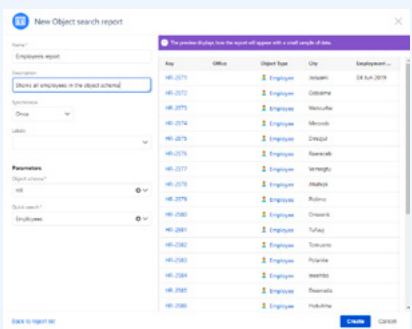
You can use dynamic reports to view information about assets in **Assets** in Jira Service Management object schemas (asset-based reports) or Jira issues with asset custom fields (issue-based reports). For example, you can use asset-based reports to monitor the health of your asset/CI data and assess 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.	 <table><thead><tr><th>Users</th><th>Keyboard and Mobile phone owners</th><th>Total</th></tr></thead><tbody><tr><td>Administrative</td><td>1</td><td>1</td></tr><tr><td>Total</td><td>1</td><td>1</td></tr></tbody></table>	Users	Keyboard and Mobile phone owners	Total	Administrative	1	1	Total	1	1																																																																												
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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.	 <table><thead><tr><th>Key</th><th>Office</th><th>Object type</th><th>City</th><th>Employment</th></tr></thead><tbody><tr><td>461-2571</td><td>Engineer</td><td>Engineer</td><td>London</td><td>28 Jun 2019</td></tr><tr><td>461-2572</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2573</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2574</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2575</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2576</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2577</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2578</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2579</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2580</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2581</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2582</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2583</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2584</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2585</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr><tr><td>461-2586</td><td>Engineer</td><td>Engineer</td><td>London</td><td></td></tr></tbody></table>	Key	Office	Object type	City	Employment	461-2571	Engineer	Engineer	London	28 Jun 2019	461-2572	Engineer	Engineer	London		461-2573	Engineer	Engineer	London		461-2574	Engineer	Engineer	London		461-2575	Engineer	Engineer	London		461-2576	Engineer	Engineer	London		461-2577	Engineer	Engineer	London		461-2578	Engineer	Engineer	London		461-2579	Engineer	Engineer	London		461-2580	Engineer	Engineer	London		461-2581	Engineer	Engineer	London		461-2582	Engineer	Engineer	London		461-2583	Engineer	Engineer	London		461-2584	Engineer	Engineer	London		461-2585	Engineer	Engineer	London		461-2586	Engineer	Engineer	London	
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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:

Link

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

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 updated) 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 Service Management Cloud | Atlassian Support](#)

[Jira Software Automation: Basics | Atlassian](#)

[Jira automation actions | Cloud automation Cloud | Atlassian Support](#)

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?
| Jira Service Management
Cloud | Atlassian Support](#)

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? | Jira Service Management Cloud | Atlassian Support](#)

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 Jira Service Management has all these tools, it's not 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 - Jira Service Management Data Center/Server app	Assets in Jira Service Management Cloud Premium or Enterprise
Objects and object modeling		
Object schemas Use object schemas to organize the structure of your object types, objects, and attributes.	✓	✓
Object schema templates Create an object schema from a template that contains a pre-created object types and objects.	✓	
Object types Use object types to specify assets/CIs by defining attributes and references between other object types.	✓	✓
Objects A specific instance of an object type. E.g. 'Laptop' would be an object type and 'MacBook-4523' would be an object.	✓	✓
Number of objects	Unlimited Subject to the performance parameters you set for your Jira Service Management environment.	1 million
Attributes Use attributes to manage what kind of information is stored for each object type.	✓	✓
References Use references to define how objects are related to one another.	✓	✓

User Roles

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.



This is a priority area
for future development
cycles.

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)



This is a priority area for future development cycles.

Export objects

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



Reporting, viewing, and 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.



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 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.³

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.”

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.”⁴

The key to successful technology management in the current era is aligning key objectives and shedding legacy perceptions of what CMDB means for IT inventory and assets. 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.


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

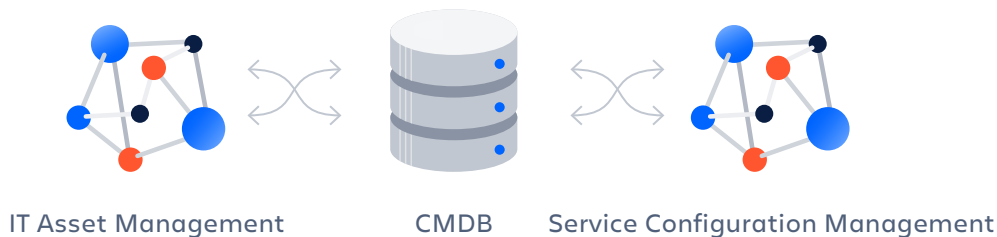
³ Gartner, Inc. “Break the CMDB Failure Cycle With a Service Asset and Configuration Management Program.” Published 5 May 2020.





⁴ Forrester Research, Inc. “The State of Service Management, 2022.” Published 22 July 2022.

When saying “modern” world, it means a technology landscape that is agile, hybrid, and changing – based on emerging DevOps practices, provided 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** - The 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 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 in Jira Service Management' 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 no one likes “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, 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 to 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 design your service model architecture

Here are some common questions a company might ask to give some inspiration of 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">• What type of IT devices are important for us to track and manage?• What do we need to understand about our IT devices to track them effectively?• What do we need to track when onboarding and offboarding employees and contractors?• What types of software licenses do we track (cloud vs physical)? Do we have a good understanding of the subscription license purchased versus assigned?• 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?• What types of information do we need to track to support financial audit requirements?	<ul style="list-style-type: none">• What are the top services that are important to our business?• Who manages these services?• What percentage of services are deployed to the cloud (AWS, Azure, Google etc.)?• Do we have a good understanding of the service taxonomy (the supporting service applications/ infrastructure and their relationships)?• What types of information do we need to track to support compliance requirements?

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?

It is recommended 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, 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, less 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 most cases, 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, it is recommended 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. Establish a consistent naming convention to improve usability of asset data. Serialnumber, 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.

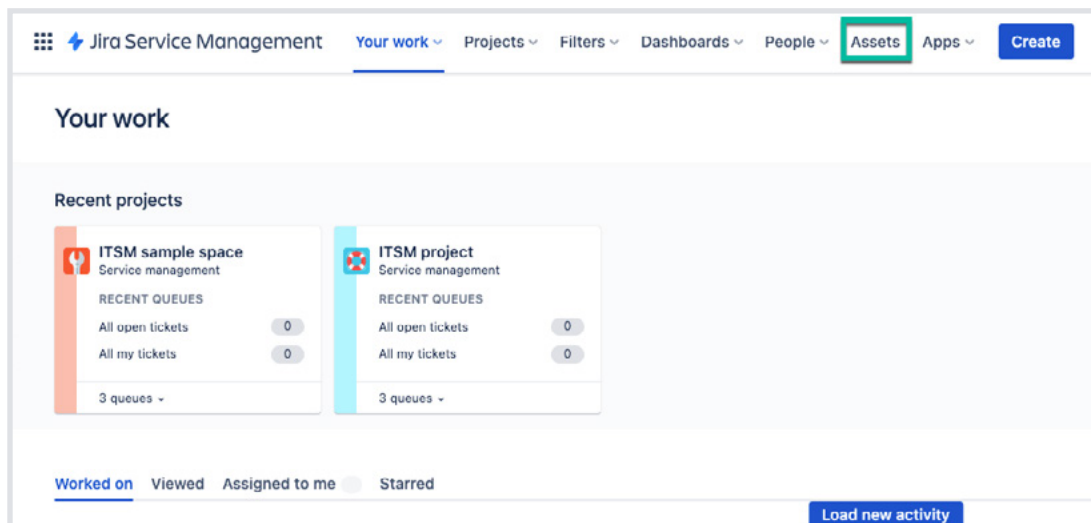
How do I build assets using **Assets** in Jira Service Management?

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.

To start your free trial of Jira Service Management Cloud Premium, get in touch with your local Atlassian Solution Partner.

Access **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, it is recommended you create a project using the IT service management template. In a new instance, this template creates 2 projects:

- ITSM sample space 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 already created for you.
- ITSM project 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.

The top screenshot shows the Jira Service Management interface. The 'Projects' tab is selected in the top navigation bar. On the left, the 'Projects' sidebar is visible, showing a search bar and a list of projects: 'ITSM project' and 'ITSM sample space'. The 'View all projects' link is highlighted with a red box. On the right, the 'RECENT' section shows the same two projects. The 'Type' column for both projects is 'Service management'.

The bottom screenshot shows the 'Projects' page with a table of projects. The 'Key' column is highlighted with a red box for the 'ITSM project' row. The 'ITSM sample space' row has a key of 'ITSAMPLE' highlighted with a red box.

Name	Key	Type
ITSM project	IP	Service management
ITSM sample space	ITSAMPLE	Service management

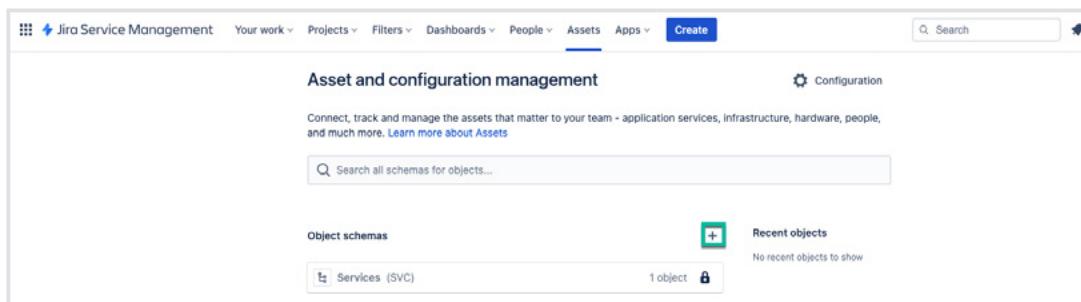
Use Case - Tracking a Jira request for an employee laptop

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

Step 1 - Create an object schema for Facilities

Facility data will be included in employee records, so a Facilities object schema must be created first, so information can be referenced by the Employees object schema created next. Floors and rooms will be tracked as nested object types with the information displayed 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. The Services object schema will be covered further in a later section.

Click the “+” to display the **Create object schema** window, enter object schema information, and create the record

Configure the new object schema and select *Allow others to select objects from this schema* because the facility data should be reference-able by other objects.

Create object schema

Name *

Facilities

Max. 50 characters.

Key *

FAC

Max. 10 characters.

Description

A place to store facilities and various information about them

Max. 80 characters.

CreateCancel

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

+

Recent objects

No recent objects to show

 Facilities (FAC)	0 objects	
 Services (SVC)		

Configuration

Delete

Jiro Service Management

Your work Projects Filters Dashboards People Insight Apps Create

Search

Facilities

A place to store facilities and various information about them

Search object types

Search objects Overview Graph Object schema

Configure

+ Create

Empty Object Schema

No object types are created yet, [create](#) some right away.

Back to Facilities view

Configure Facilities

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	14
Name	Facilities
Description	A place to store facilities and various information about them
Key	FAC
Number of object types	0
Number of objects	0
Created	18/Oct/22 1:20 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

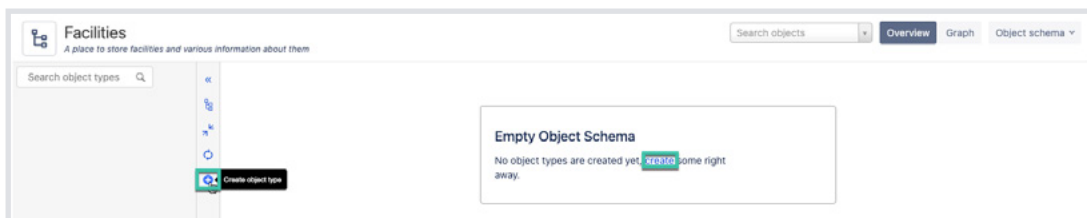
Enable quick creation of referenced objects and Validate objects attributes in quick object creation are set by default.

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.

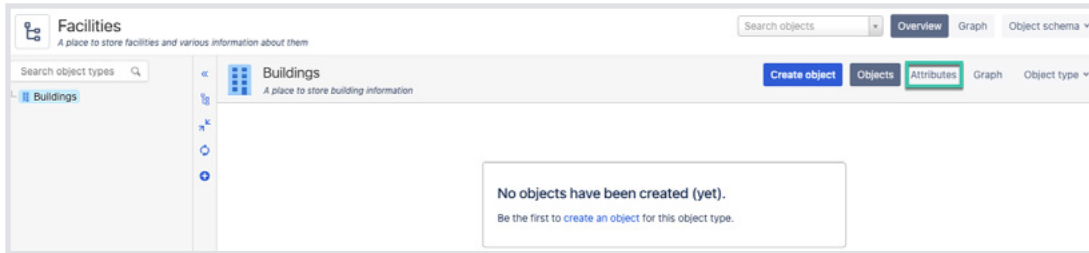
Step 2 - Create an object type and objects for Buildings

Click the **+** icon or the **Create** link to display the **Create Object Type** window, enter the object type information, and create the record

The screenshot shows the 'Create Object Type' dialog box. It has a title bar 'Create Object Type'. Inside, there are several fields: 'Name' with the value 'Buildings', 'Icon' with a dropdown menu showing 'Building', 'Parent' with a dropdown menu showing 'None', and 'Description' with the text 'A place to store building information'. At the bottom, there are three buttons: 'Create another', 'Create', and 'Cancel'. The 'Create' button is highlighted in blue. The dialog box is styled with a light blue border and a white background.

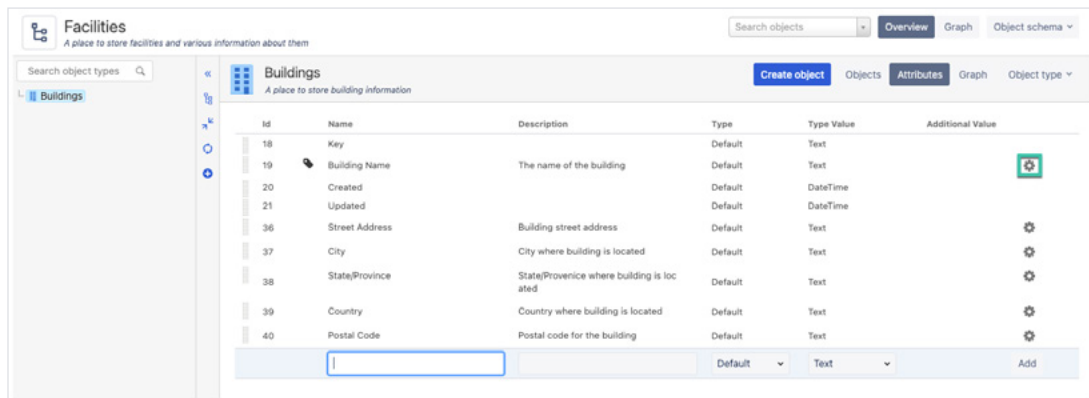
PRO TIP

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

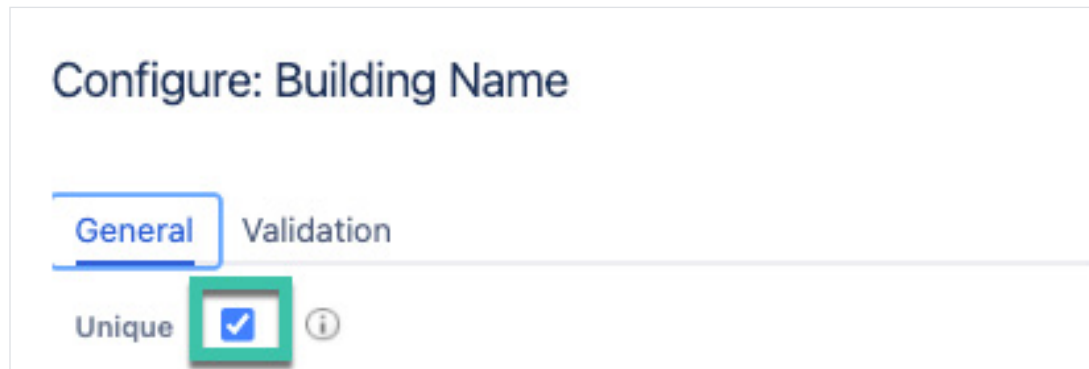


Select the **Attributes** option for **Buildings** object type and add options important to your organization:

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

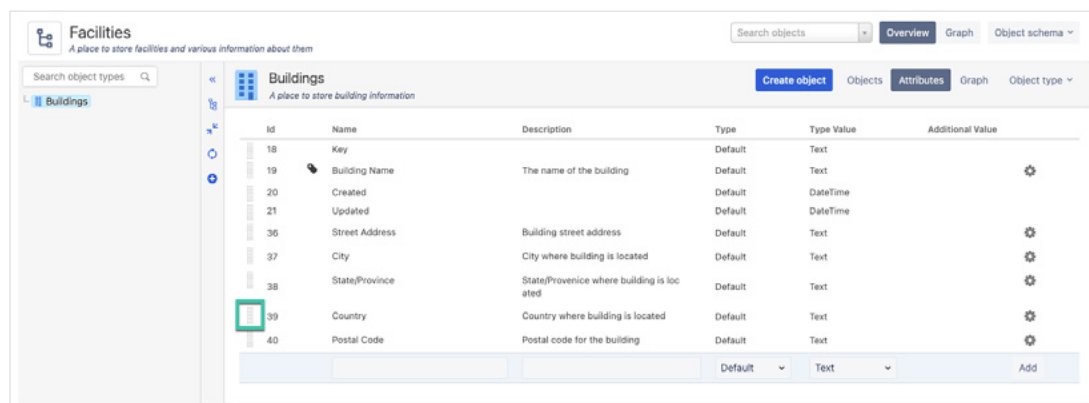


For the **Name** attribute, update the name data to “Building Name”, click the cog icon and configure the **Name** attribute to be unique, so you avoid duplicate building names

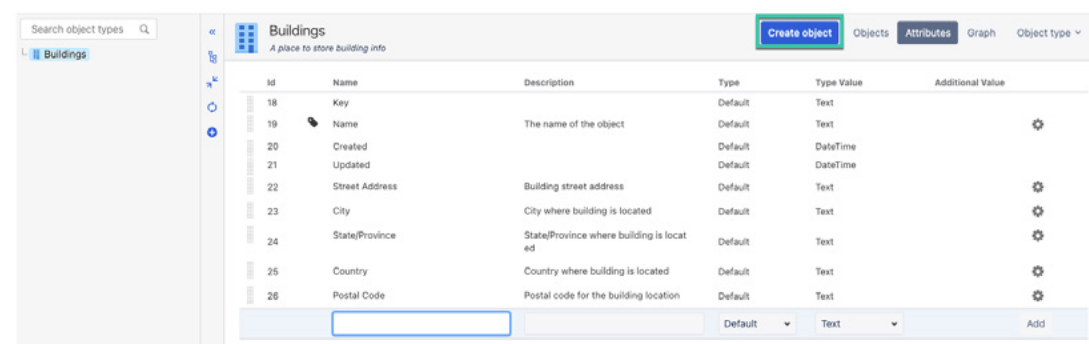


PRO TIP

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



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

Create Object

Object Type^{*}

Buildings

Avatar

Choose a file

Building Name^{*}

Austin office

The name of the building

Street Address

303 Colorado St

Building street address

City

Austin

City where building is located

State/Province

TX

State/Province where building is located

Country

United States

Country where building is located

Postal Code

78701

Postal code for building location

Create another

Create

Cancel

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

Facilities

A place to store facilities and various information about them

Search object types

Buildings (4)

Floors

Rooms

Temporary Locations

Filter Search

Advanced

1-4 of 4

Key	Building Name	Created	Updated	Street Address	City	State/Province	Country	Postal Code
FAC-05	Remote Workspace	23/Oct/22 11:10 PM	23/Oct/22 11:10 PM	No Value	No Value	No Value	No Value	No Value
FAC-05	Austin office	20/Oct/22 5:48 PM	20/Oct/22 5:48 PM	303 Colorado St	Austin	TX	United States	78701
FAC-04	San Francisco office	20/Oct/22 5:44 PM	20/Oct/22 5:44 PM	350 Bush Street	San Francisco	CA	United States	94104
FAC-03	Boston office	18/Oct/22 10:03 PM	20/Oct/22 5:42 PM	239 Causeway Street	Boston	MA	United States	02114

1-4 of 4

Columns

Edit

Clone

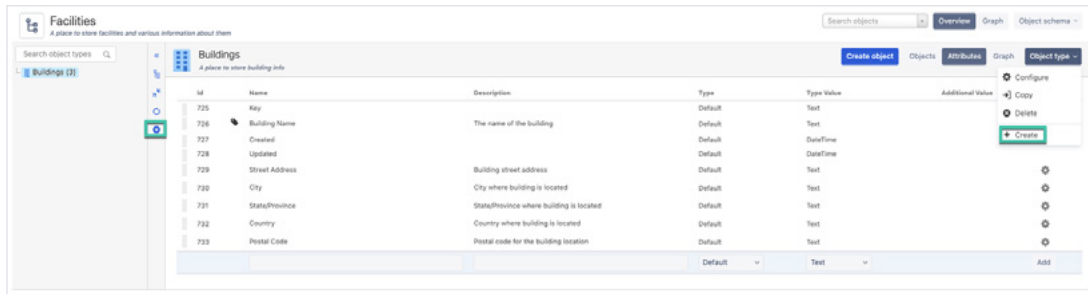
Delete

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 create a hierarchical data structure to support this requirement. To create a hierarchical data structure, 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**.



Create Object Type

Name*

Floors

Max. 50 characters.

Icon*

Building

Parent

Buildings

Description

A place to store floor information for a building

Max. 70 characters.

☐ Create another Create Cancel

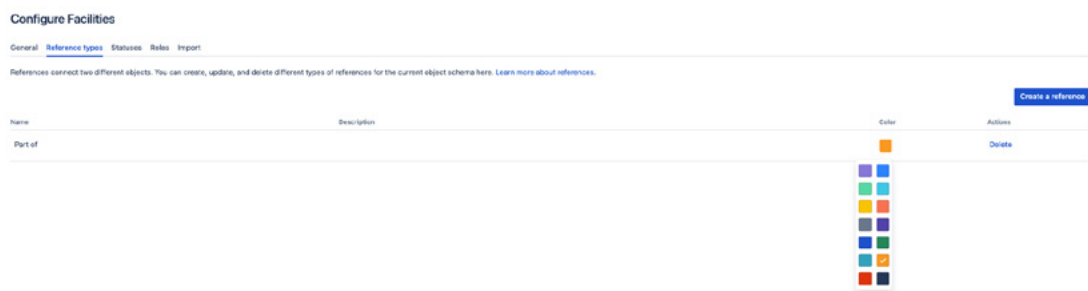
Select the **Attributes** option for **Floors** object type and add the following item:

Name	Type	Value	Additional Value
Building Name	Object	Buildings	Part of

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



For the **Building Name** attribute, you 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.



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

Create Object Type

Name ^{*}

Rooms

Max. 50 characters.

Icon ^{*}

Building

Parent

Floors

Description

A place to store room information for a floor

Max. 70 characters.

☐ Create another **Create** Cancel

Select the **Attributes** option for **Rooms** object type and add the following item:

Name	Type	Value	Additional Value
Floor Name	Object	Floors	Part of



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

Click the **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**.



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 simply added as an object type along with any needed information.

Create Object Type

Name*
Temporary Locations
Max. 50 characters.

Icon*
Cardboard Box
▼

Parent
None
▼

Description
A place to store temporary location information
Max. 70 characters.

☐ Create another **Create** Cancel

Facilities
A place to store facilities and various information about them

Search object types

Buildings (3)
Floors
Rooms
Temporary Locations

Temporary Locations
A place to store temporary location information

Create object Objects **Attributes** Graph Object type

ID	Name	Description	Type	Type Value	Additional Value
769	Key		Default	Text	
769	Temporary Location Name	The name of the temporary location	Default	Text	
770	Created		Default	DateTime	
771	Updated		Default	DateTime	
772	Description	Description of temporary location	Default	Text	
			Default	Text	Add

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

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](#)

Q Search all schemas for objects...

Object schemas

+

Facilities (FAC)

3 objects

...

Services (SVC)

1 object

🔒

Recent objects

San Francisco office

Boston office

Austin office

Display the **Create Object Schema** window, enter object schema information, then configure the object schema to select *Allow others to select objects from this schema*.

Create object schema

Name *

Employees

Max. 50 characters.

Key *

EM

Max. 10 characters.

Description

A place to store employees and various information about them

Max. 80 characters.

Create

Cancel

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	15
Name	Employees
Description	A place to store employees and various information about them
Key	EM
Number of object types	0
Number of objects	0
Created	20/Oct/22 12:00 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 Employees.


Create Object Type

Name^{*}


Employees

Max. 50 characters.

Icon^{*}

 User

Parent

 None

Description

A place to store employee information

Max. 70 characters.

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

Select the **Attributes** option for **Employees** object type and add options 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 cog icon, and configure the Name attribute to be unique, so you avoid duplicate employee names.

ID	Name	Description	Type	Type Value	Additional Value
94	Key		Default	Text	
95	Name	The name of the employee	Default	Text	
96	Created		Default	DateTime	
97	Updated		Default	DateTime	
98	Allocation Account ID	Allocation account ID of the employee	User		
214	Department	Employee's department	Default	Select	
99	Manager Name	Employee's manager	Object	Employees	Reports to
100	Job Role	Employee's job role	Default	Text	
101	Email	Employee's email	Default	Email	
102	Location	Employee's work location	Object	Buildings	Reference
103	Employment Type	Full-time employee, contractor, etc.	Default	Select	
213	Start Date	Employee start date	Default	Date	
212	Status	Status of employee	Status		

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.

ID	Name	Description	Type	Type Value	Additional Value
94	Key		Default	Text	
95	Name	The name of the employee	Default	Text	
96	Created		Default	DateTime	
97	Updated		Default	DateTime	
98	Allocation Account ID	Allocation account ID of the employee	User		
214	Department	Employee's department	Default	Select	
99	Manager Name	Employee's manager	Object	Employees	Reports to
100	Job Role	Employee's job role	Default	Text	
101	Email	Employee's email	Default	Email	
102	Location	Employee's work location	Object	Buildings	Reference
103	Employment Type	Full-time employee, contractor, etc.	Default	Select	
213	Start Date	Employee start date	Default	Date	
212	Status	Status of employee	Status		

Configure the Employment Type attribute and add relevant options:

- Full-time Employee
- Contractor

Configure: Employment Type

General **Options** Cardinality

Add

	Full-time Employee	×
	Contractor	×

Update

Cancel

PRO TIP

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

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

Create Object

Object Type*

Employees

Name*

Jennifer Fish

The name of the employee

Atlassian Account ID

Jennifer Fish

Atlassian Account ID of the employee

Department

Marketing

Employee's department

Manager Name

Blythe Smithson

Employee's manager

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

07/25/2022

Clear

Employee start date

Status

Active

Status of employee

Avatar

Choose a file

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.

Atlassian Account ID

Jennifer

Showing 1 users

Jennifer Fish - jfish@atlassia...

In the **Manager** attribute, type in the manager's name and a list of matching 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.

Manager Name

Blythe Smith

All Objects

Blythe Smithson

Blythe Smith (New Object)

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

Employees

Search object name

Create object

Objects | Attributes | Graph | Object type

1-3 of 3

Key	Name	Created	Updated	Atlassian Account ID	Department	Manager Name	Job Role	Email	Location	Employment Type	Start Date	Status
101-10	Jennifer Fish	2020/02/19 4:45 AM	02/Nov/21 5:14 PM	Jennifer Fish	Marketing	Blythe Smithson	Content Specialist	jfish@atlassian.com	Remote	Contractor	2020/02/19	active
101-11	Blythe Smithson	2020/02/19 4:45 AM	02/Nov/21 5:14 PM	Not linked	Marketing	No value	Product Marketing	bsmithson@atlassian.com	San Francisco	Full-time Employee	2020/02/19	active
101-12	Brenny Cookman	2020/02/19 4:45 AM	02/Nov/21 5:14 PM	Not linked	Marketing	Blythe Smithson	Product Marketing	bcookman@atlassian.com	San Francisco	Full-time Employee	2020/02/19	active

1-3 of 3

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

Blythe Smithson

EM-18

Marketing

Product Marketing Senior Team Lead

bsmithson@atlassian.com

San Francisco office

Full-time Employee

ACTIVE

Activity

Created	Type	Action	Attribute	Old value	New value
07/Nov/22 5:14 PM	Added Value	Jennifer Fish	Department		Marketing
06/Nov/22 1:08 PM	Added Value	Jennifer Fish	Status		ACTIVE
06/Nov/22 1:08 PM	Added Value	Jennifer Fish	Start Date		24-Jul/17
25/Oct/22 9:46 AM	Added Value	Jennifer Fish	Employment Type		Full-time Employee
25/Oct/22 9:46 AM	Added Reference	Jennifer Fish	Location		San Francisco office
25/Oct/22 9:46 AM	Added Value	Jennifer Fish	Email		bsmithson@atlassian.com
25/Oct/22 9:46 AM	Added Value	Jennifer Fish	Job Role		Product Marketing Senior Team Lead
25/Oct/22 9:46 AM	Created	Jennifer Fish			

Comments

There are no attachments.

Connected Jira issues

No related issues found for specified filter.

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

View Object Graph

Blythe Smithson

Key: EM-18

Name: Blythe Smithson

Created: 25/Oct/22 9:46 AM

Updated: 07/Nov/22 5:14 PM

Department: Marketing

Job Role: Product Marketing Senior Team Lead

Email: bsmithson@atlassian.com

Location: San Francisco office

Employment Type: Full-time Employee

Start Date: 24/Jul/17

Status: ACTIVE

Connected Jira issues

No related issues found for specified filter.

Go to object

Close

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 cog icon to display the bulk action options.

Employees
A place to store employees and various information about them

Search objects: Overview Graph Object schema

Search object types: Employees (3)

Filter Search: Advanced

1-3 of 3

Key	Employee Name	Updated	Atlassian Account ID	Manager Name	Job Role	Email	Location	Employment Type
EM-96	Ryhe Smithson	02/Nov/22 9:08 PM	No Value	No Value	Product Marketing Senior Team Lead	smithsonr@atlassian.com	San Francisco office	Full-time Employee
EM-91	Jennifer Fish	02/Nov/22 9:08 PM	Jennifer Fish	Ryhe Smithson	Content Specialist	jfish@atlassian.com	Remote Workspace	Contractor
EM-92	Jessy Coolman	02/Nov/22 9:08 PM	No Value	Ryhe Smithson	Product Marketing Manager	jcoolman@atlassian.com	San Francisco office	Full-time Employee

1-3 of 3

BULK ACTIONS (3)

- Edit objects
- Export objects
- Print QR Codes
- Delete

Bulk edit (3)

Here you can modify multiple objects at once. All objects currently filtered will be changed.

Keep ☐ **Name**

The name of the employee

Keep ☐ **Atlassian Account ID**

Atlassian Account ID of the employee

Keep ☐ **Manager Name**

Employee's manager

Keep ☐ **Job Role**

Employee's job role

Keep ☐ **Email**

Employee's email

Keep ☐ **Location**

Employee's work location

Keep ☐ **Employment Type**

Full-time employee, contractor, etc.

Keep ☐ **Start Date**

Employee start date

Keep ☐ **Change** ☒ **Status**

Status of employee

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

Manufacturer data will be included in IT asset records, so a **Business Partners** object schema must first be created, so information can be referenced by the **IT Assets** object schema created next. Object types will also be created for vendors and suppliers which can be used 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



 Employees (EM)	3 objects ...
 Facilities (FAC)	4 objects ...
 Services (SVC)	1 object 

Recent objects

-  Blythe Smithson
-  Austin office
-  Remote Workspace
-  Jennifer Fish
-  Jeremy Coolman

[View more](#)

Display the **Create Object Schema** window, enter object schema information, then configure the object schema to select *Allow others to select objects from this schema*.

Create object schema

Name *

Business Partners

Max. 50 characters.

Key *

BP

Max. 10 characters.

Description

A place to store business partners and various information about them

Max. 80 characters.

Create Cancel

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	5
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	24/Oct/22 11:40 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 **Business Partners** and configure the object type with *Pass all attributes to child object types* and *Set this object as abstract*

Create Object Type

Name^{*}

Max. 50 characters.

Icon^{*}

Parent

Description

Max. 70 characters.

☐ Create another

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.

Note that all attributes will be copied from the parent object type and cannot be modified.

Select the **Attributes** option for **Business Partners** object type and add relevant options:

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	

ID	Name	Description	Type	Type Value	Additional Value
67	Key		Default	Text	
68	Name	The name of the object	Default	Text	
69	Created		Default	DateTime	
70	Updated		Default	DateTime	
76	Business Name	Business full name	Default	Text	
71	Account Manager	Overall account manager	Default	Text	
72	Technical Account Manager	Technical account manager	Default	Text	
73	Customer Success Manager	Customer success manager	Default	Text	
77	Customer Support Contact	Customer support contact	Default	Text	
78	Account Information	General account information	Default	Textarea	

For the **Name** attribute, click the **cog** icon and configure the **Name** attribute to be unique, so you avoid duplicate object names.

Step 7 - Create an object type and objects for Manufacturers

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


Create Object Type

Name*


Manufacturers

Max. 50 characters.

Icon*

 Factory

Parent

 Business Partners

Description

A place to store manufacturer information

Max. 70 characters.

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

Business Partners
A place to store business partners and various information about them

Search object types

Business Partners

Create object Objects Attributes Graph Object type

ID	Name	Description	Type	Type Value	Additional Value
67	Key		Default	Text	
68	Name	The name of the object	Default	Text	
69	Created		Default	DateTime	
70	Updated		Default	DateTime	
76	Business Name	Business full name	Default	Text	
71	Account Manager	Overall account manager	Default	Text	
72	Technical Account Manager	Technical account manager	Default	Text	
73	Customer Success Manager	Customer success manager	Default	Text	
77	Customer Support Contact	Customer support contact	Default	Text	
74	Account Information	General account information	Default	Textarea	

Default Text Add

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

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

Create Object

Object Type *

 Manufacturers

Avatar

Choose a file

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 Contact

Lilian Chu

Customer support contact

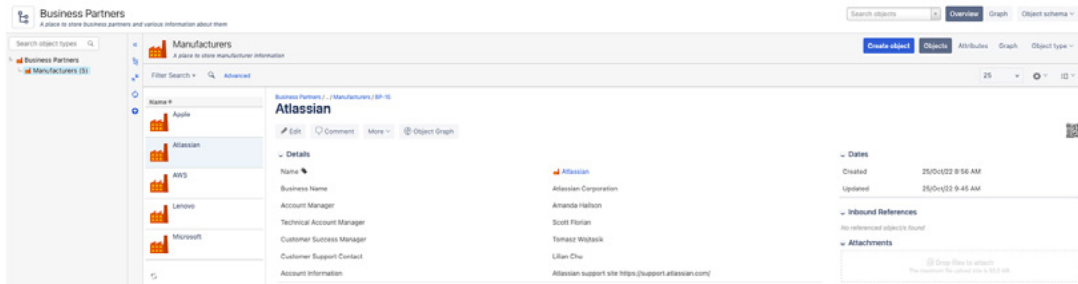
Account Information

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

General account information

☐ Create another **Create** Cancel

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



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

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

Create Object Type

Name *

Vendors

Max. 50 characters.

Icon *

Cottage

Parent

Business Partners

Description

A place to store vendor information

Max. 70 characters.

☒ Create another

Create

Cancel

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

Create Object Type

Name
Suppliers
Max. 50 characters.

Icon
Shop

Parent
Business Partners

Description
A place to store supplier information
Max. 70 characters.

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

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.

Business Partners
A place to store business partners and various information about them

Search object types: [Overview](#) [Graph](#) [Object schema](#)

Vendors
A place to store vendor information

[Create object](#) [Objects](#) [Attributes](#) [Graph](#) [Object type](#)

ID	Name	Description	Type	Type Value	Additional Value
67	Key		Default	Text	
68	Name	The name of the object	Default	Text	
69	Created		Default	Date time	
70	Updated		Default	Date time	
76	Business Name	Business full name	Default	Text	
71	Account Manager	Overall account manager	Default	Text	
72	Technical Account Manager	Technical account manager	Default	Text	
73	Customer Business Manager	Customer business manager	Default	Text	
77	Customer Support Contact	Customer support contact	Default	Text	
74	Account Information	General account information	Default	Text area	
Vendor Category		Type of vendor	Default	Default	Add

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.

General Options Cardinality


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

Update Cancel

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

Create Object

Object Type*

 Vendors

Name*

Zones

The name of the object

Business Name

Zones IT Solutions 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 Contact

800-408-9663

Customer support contact

Account Information

https://www.zones.com/site/home/index.html

General account information

Vendor Category

Desktops and workstations

Type of vendor

Avatar

Choose a file

☐ Create another

Create

Cancel

Step 9 - Create an object schema for IT Assets

Now let's create an **IT Assets** object schema that will reference information in the **Employees** and **Manufacturer** object types.

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		Recent objects
Business Partners (BP)	5 objects ...	Atlassian
Employees (EM)	3 objects ...	Microsoft
Facilities (FAC)	4 objects ...	Lenovo
Services (SVC)	1 object	AWS
		Apple
		View more

Display the **Create object schema** window, enter object schema information, then configure the object schema to select *Allow others to select objects from this schema*.

Create object schema

Name *

IT Assets

Max. 50 characters.

Key *

ITASSET

Max. 10 characters.

Description

A place to track IT hardware and software assets and configurations

Max. 80 characters.

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

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	11
Name	IT Assets
Description	A place to track IT hardware and software assets and configurations
Key	ITASSET
Number of object types	11
Number of objects	11
Created	12/Sep/22 4:36 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 Asset object schema and add options:

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 in use

Max. 255 characters.

Category *

Active

Create

Cancel

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
8	Disposed	Asset is disposed and removed from accounting records	Inactive	Delete
9	In Stock	Asset is stored in a stockroom or maintenance room but not in use	Pending	Delete
10	In Transit	Asset is being transported	Inactive	Delete
11	In Use	Asset is deployed and in use	Active	Delete
12	Missing	Asset is not found in its expected location	Inactive	Delete
13	Ordered	Asset is ordered but not in stock	Inactive	Delete
14	Retired	Asset is deployed but no longer in use	Inactive	Delete

PRO TIP

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

Step 10 - Create an object type for Hardware

Create Object Type

Name*
Hardware
Max. 50 characters.

Icon*
Workstation ▼

Parent
None ▼

Description
A place to store IT hardware
Max. 70 characters.

☐ Create another Create Cancel

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*

General Roles Inheritance

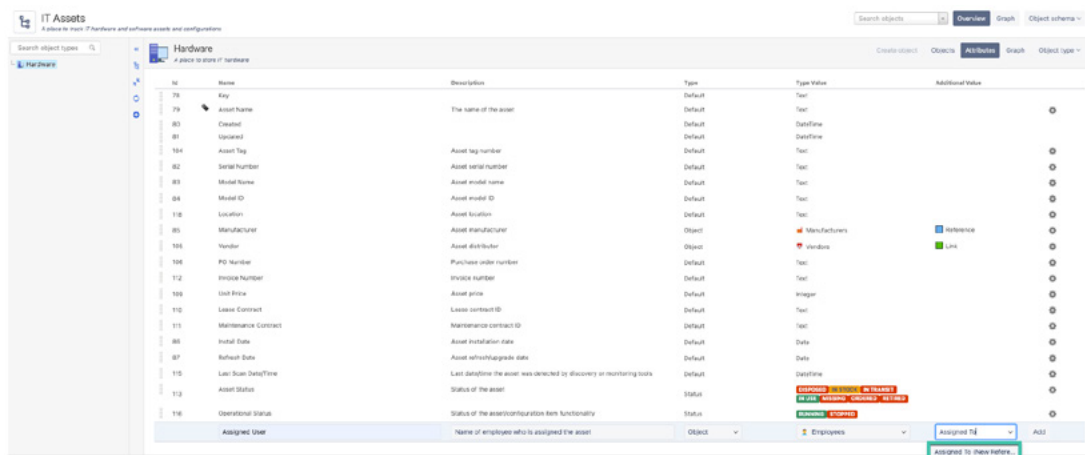
Inheritance allows you to automatically pass attributes from parent object types to child object types. [Learn more about inheritance.](#)

- ☒ 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 the following items:

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

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



The screenshot shows the 'IT Assets' management interface. The 'Hardware' section is selected, displaying a list of attributes and their values. The 'Assigned User' attribute is highlighted, showing a value of 'Employees' and a dropdown menu with 'Assigned To' and 'Assigned to new name' options.

ID	Name	Description	Type	Type Value	Additional Value
78	Key		Default	Text	
79	Asset Name	The name of the asset	Default	Text	
80	Created		Default	Date/Time	
81	Updated		Default	Date/Time	
104	Asset Tag	Asset tag number	Default	Text	
82	Serial Number	Asset serial number	Default	Text	
83	Model Name	Asset model name	Default	Text	
84	Model ID	Asset model ID	Default	Text	
118	Location	Asset location	Default	Text	
85	Manufacturer	Asset manufacturer	Object	Manufacturers	Reference
106	Vendor	Asset distributor	Object	Vendors	Link
108	PID Number	Purchase order number	Default	Text	
112	Invoice Number	Invoice number	Default	Text	
109	Unit Price	Asset price	Default	Integer	
110	Lease Contract	Lease contract ID	Default	Text	
111	Maintenance Contract	Maintenance contract ID	Default	Text	
86	Install Date	Asset installation date	Default	Date	
87	Refresh Date	Asset refresh/upgrade date	Default	Date	
119	Last Scan Date/Time	Last date/time the asset was detected by discovery or monitoring tools	Default	Date/Time	
113	Asset Status	Status of the asset	Status	Ordered, In Transit, In Stock, In Use, Missing, Retired, Disposed	
116	Operational Status	Status of the asset/configuration item functionality	Status	Running, Stopped	
Assigned User		Name of employees who assigned the asset	Object	Employees	Assigned To, Assigned to new name

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

Click the **cog icon** and configure the **Asset Tag**, and **Serial Number** attributes to be unique, so you avoid duplicate asset data.

IT Assets						
A place to track IT hardware and software assets and configurations						
Hardware						
A place to store IT hardware						
ID	Name	Description	Type	Type Value	Additional Value	
78	Key		Default	Text		
79	Asset Name	The name of the asset	Default	Text		
80	Created		Default	DateTime		
81	Updated		Default	DateTime		
104	Asset Tag	Asset tag number	Default	Text		
82	Serial Number	Asset serial number	Default	Text		
83	Model Name	Asset model name	Default	Text		
84	Model ID	Asset model ID	Default	Text		
118	Location	Asset location	Default	Text		
85	Manufacturer	Asset manufacturer	Object	Manufacturers	Reference	
105	Vendor	Asset distributor	Object	Vendors	Link	
106	PO Number	Purchase order number	Default	Text		
112	Invoice Number	Invoice number	Default	Text		
109	Unit Price	Asset price	Default	Integer		
110	Lease Contract	Lease contract ID	Default	Text		
111	Maintenance Contract	Maintenance contract ID	Default	Text		
86	Install Date	Asset installation date	Default	Date		
87	Refresh Date	Asset refresh/upgrade date	Default	DateTime		
115	Last Scan DateTime	Last datetime the asset was detected by discovery or monitoring tools	Default	DateTime		
113	Asset Status	Status of the asset	Status	AssetStatus		
116	Operational Status	Status of the asset/configuration item functionality	Status	OperationalStatus		
119	Assigned User	Name of employee who is assigned the asset	Object	Employees	Assigned To	Update Cancel

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 ☒ ⓘ

Update

Cancel

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

Configure: Unit Price

General Cardinality

Suffix

Unique ☐ ⓘ

Show sum ☐ ⓘ

Update

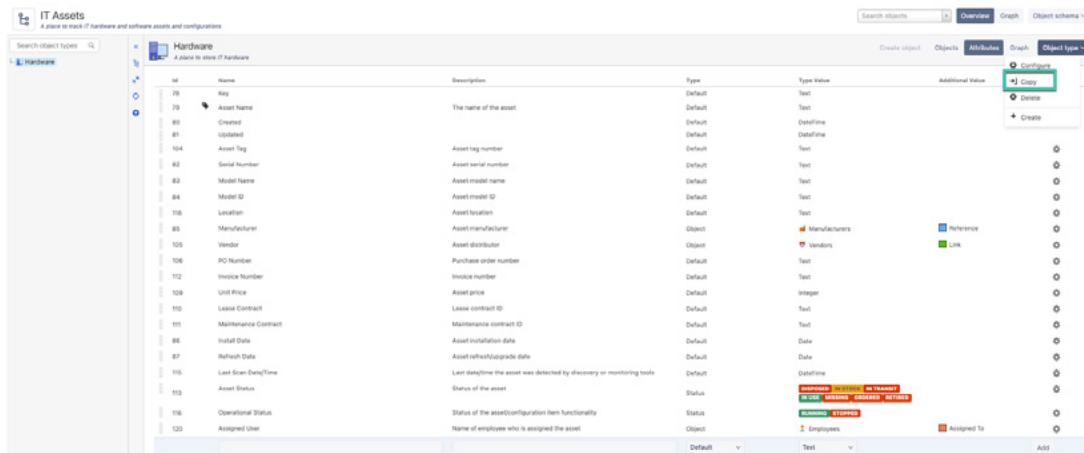
Cancel

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.

Copy the Hardware object type and create a new object type for Software.



ID	Name	Description	Type	Type Value	Additional Value
78	Key		Default	Text	
79	Asset Name	The name of the asset	Default	Text	
80	Created		Default	DateTime	
81	Updated		Default	DateTime	
104	Asset Tag	Asset tag number	Default	Text	
82	Serial Number	Asset serial number	Default	Text	
83	Model Name	Asset model name	Default	Text	
84	Model ID	Asset model ID	Default	Text	
109	Location	Asset location	Default	Text	
85	Manufacturer	Asset manufacturer	Object	Manufacturers	Reference
105	Vendor	Asset distributor	Object	Vendors	Link
106	PO Number	Purchase order number	Default	Text	
112	Invoice Number	Invoice number	Default	Text	
109	Unit Price	Asset price	Default	Integer	
110	Lease Contract	Lease contract ID	Default	Text	
111	Maintenance Contract	Maintenance contract ID	Default	Text	
86	Install Date	Asset installation date	Default	Date	
87	Refresh Date	Asset refresh/upgrade date	Default	Date	
115	Last Scan DateTime	Last datetime the asset was detected by discovery or monitoring tools	Default	DateTime	
113	Asset Status	Status of the asset	Status	Asset Status	
116	Operational Status	Status of the asset/configuration item functionality	Status	Operational Status	
120	Assigned User	Name of employee who is assigned the asset	Object	Employees	Assigned To

Copy Object Type: Hardware

Copy as*

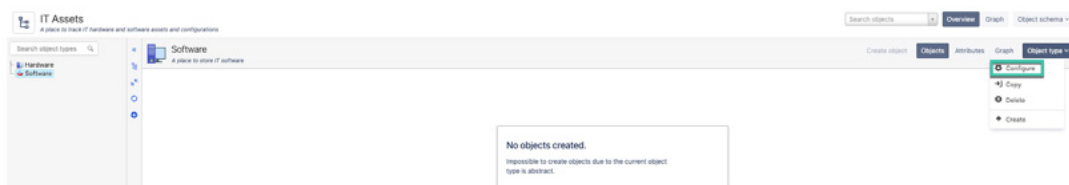
Software

Max. 50 characters.

Copy

Cancel


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



Configure Software

General Roles Inheritance

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

ID	30
Name	Software
Icon	 Software Box
Description	A place to store IT software

Select the **Attributes** option for Software object type and include relevant options and delete any unnecessary items:

Name	Type	Value	Additional Value
Title	Default	Text	
Version	Default	Text	Default
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	
Operational Status	Status	Running Stopped	
Assigned User	Object	Employees	Assigned To

ID	Name	Description	Type	Type Value	Additional Value
165	Key		Default	Text	
166	Asset Name	The name of the asset	Default	Text	
167	Created		Default	DateTime	
168	Updated		Default	DateTime	
171	Title	Software asset title	Default	Text	
172	Version	Software asset version	Default	Text	
173	Patch	Software asset patch level	Default	Text	
174	Manufacturer	Asset manufacturer	Object	Manufacturers	Reference
175	Vendor	Asset distributor	Object	Vendors	Link
211	Product Key	Asset software key	Default	Text	
176	PO Number	Purchase order number	Default	Text	
177	Invoice Number	Invoice number	Default	Text	
179	Contract	Software contract ID	Default	Text	
180	Maintenance Contract	Maintenance contract ID	Default	Text	
187	GA Date	Date asset is available for purchase	Default	Date	
188	Maintenance Renewal Date	Date maintenance contract expires	Default	Date	
181	EOL Date	End of marketing date for asset	Default	Date	
182	EOL Date	End of support date for asset	Default	Date	
183	Last Scan Date/Time	Last date/time the asset was detected by discovery or monitoring tools	Default	DateTime	
184	Asset Status	Status of the asset	Status	Active, Inactive, Archived, Not Active	
185	Operational Status	Status of the asset/configuration item functionality	Status	Operational, Degraded, Not Operational	
186	Assigned User	Name of employee who is assigned the asset	Object	Employees	Assigned To

Step 11 - Create an object type for Laptops

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

Create Object Type

Name

Laptops

Max. 50 characters.

Icon

Laptop

Parent

Hardware

Description

A place to store laptop information

Max. 70 characters.

☐ Create another

Create

Cancel

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

ID	Name	Description	Type	Type Value	Additional Value
78	Key		Default	Text	
79	Asset Name	The name of the asset	Default	Text	
80	Created		Default	DateTime	
81	Updated		Default	DateTime	
104	Asset Tag	Asset tag number	Default	Text	
82	Serial Number	Asset serial number	Default	Text	
83	Model Name	Asset model name	Default	Text	
84	Model ID	Asset model ID	Default	Text	
119	Location	Asset location	Default	Text	
85	Manufacturer	Asset manufacturer	Object	Manufacturers	Reference
105	Vendor	Asset distributor	Object	Vendors	Link
106	PO Number	Purchase order number	Default	Text	
112	Invoice Number	Invoice number	Default	Text	
109	Unit Price	Asset price	Default	Integer	
110	Lease Contract	Lease contract ID	Default	Text	
111	Maintenance Contract	Maintenance contract ID	Default	Text	
86	Install Date	Asset installation date	Default	Date	
87	Refresh Date	Asset refresh/upgrade date	Default	Date	
115	Last Scan DateTime	Last datetime the asset was detected by discovery or monitoring tools	Default	DateTime	
113	Asset Status	Status of the asset	Status	Operational, Inoperational, In Transit, Retired, Decommissioned, Archived	
116	Operational Status	Status of the asset/configuration item functionality	Status	Operational, Inoperational	
120	Assigned User	Name of employee who is assigned the asset	Object	Employees	Assigned To

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

Step 12 - Configure the IT Assets object schema to import laptop data

Update the attached **laptop.csv** file and change the **Assigned User** data to match your Jira users.

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 +

Business Partners (RP)	5 objects	...
Employees (EM)	3 objects	...
Facilities (FAC)	4 objects	...
IT Assets (ITASSET)	0 objects	...
Services (SVC)		Configuration Delete

Recent objects

- Blythe Smithson
- Apple
- Jennifer Fish
- Jeremy Coolman
- Atlassian


[View more](#)

Configure IT Assets

General Reference types Statuses Roles **Imports**

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](#)


No imports found

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

Select import type

Select the type of import to create.

	Discovery Import Import discovery data into Assets
	JSON Import Import a JSON file into Assets
	CSV Import Import a CSV file into Assets
	External Import Import data from an external app into Assets

[Next](#)

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

Import type

Define structure

Define import structure

Name *

Laptop import

Description

Laptop import

Upload a file or import data

☒ Upload a file from your computer

Laptops.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

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. There is no need to update the additional options.

Click **Create**

Configure IT Assets

General Reference types Statuses Roles Import

Imports are a way to bring outside data into Insight and automatically convert it into Insight 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


Select **Edit mapping**


Click **Create mapping**


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 *

 Laptops ▼

 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**.

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

Laptops

DISABLED Edit attributes mapping

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

Identifier	Source field	Destination attribute	API	Concatenator	Regular expression	Base 64	Delete
<input checked="" type="checkbox"/>	Select...	Asset Name				<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Select...	Select...				<input type="checkbox"/>	<input type="checkbox"/>

Name
Serial Number
Status
Manufacturer
Vendor
Model Name
Model ID
PO
Invoice

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.

Select **Serial Number** as unique identifier.

MAPPING
Define the object types that will map your data

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

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

Select **Enable** to activate the attribute mapping.

Configure IT Assets
General Reference Types Statuses Roles Import

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

MAPPING
Define the object types that will map your data

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

Identifier	Data source field	→	Destination attribute	AQL	Concatenator	Regular expression	Base ID	
<input type="checkbox"/>	Name	→	Asset Name				<input type="checkbox"/>	Delete
<input type="checkbox"/>	Asset Tag	→	Asset Tag				<input type="checkbox"/>	Delete
<input checked="" type="checkbox"/>	Serial Number	→	Serial Number				<input type="checkbox"/>	Delete
<input type="checkbox"/>	Status	→	Asset Status				<input type="checkbox"/>	Delete
<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

The screenshot shows the "Laptops Import" mapping interface. At the top, there are tabs for "DISABLED", "Import data", and "Edit mapping". Below the tabs, the "MAPPING" section is active, displaying a table with columns: Identifier, Data source field, Destination attribute, ADL, Concatenator, Regular expression, and Row ID.

Identifier	Data source field	Destination attribute	ADL	Concatenator	Regular expression	Row ID
<input type="checkbox"/>	Name	Asset Name				Delete
<input type="checkbox"/>	Asset Tag	Asset Tag				Delete
<input checked="" type="checkbox"/>	Serial Number	Serial Number				Delete
<input type="checkbox"/>	Status	Asset Status				Delete
<input type="checkbox"/>	Manufacturer	Manufacturer	Names(Manufacturer)			Delete
<input type="checkbox"/>	Vendor	Vendor	Names(Vendor)			Delete
<input type="checkbox"/>	Model Name	Model Name				Delete
<input type="checkbox"/>		Model ID				Delete

A green box highlights the "ENABLED" button at the top right of the mapping table. Another green box highlights a notification message at the bottom left: "Laptops has been successfully enabled".

Define import structure

Name *

Laptop import

Description

Upload a file or import data

☒ Upload a file from your computer

 Laptops.csv 

☐ Import data from a web address

▼ More options

Cancel

Save

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

Configure IT Assets

General Reference types Statistics 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

Laptops import

Last Import: Oct 26, 2022 Read details

Import data

Edit mapping

Warnings

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	ADL	Constraint	Require extension	Easy 64
<input type="checkbox"/>	Refresh Date	→	Refresh Date				<input type="checkbox"/> Delete
<input type="checkbox"/>	Assigned User	→	Assigned User	Name-Id(Assigned User)			<input type="checkbox"/> Delete
<input type="checkbox"/>	Name	→	Asset Name				<input type="checkbox"/> Delete
<input type="checkbox"/>	Asset Tag	→	Asset Tag				<input type="checkbox"/> Delete
<input checked="" type="checkbox"/>	Serial Number	→	Serial Number				<input type="checkbox"/> Delete
<input type="checkbox"/>	Status	→	Asset Status				<input type="checkbox"/> Delete
<input type="checkbox"/>	Manufacturer	→	Manufacturer	Name-Id(Manufacturer)			<input type="checkbox"/> Delete

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

Laptop import import details

Result	FINISHED
Actor	 Jennifer Fish
Module key	rlabs-import-type-csv
Configuration id	b0fb250c-a3ab-49ab-a34b-2791837cfd4d
Duration	3.09 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	10	
Identical objects	0	
Objects filtered	0	
Time reading data	8 ms	

Close

The laptop data is now available.

IT Assets
A place to track IT hardware and software assets and configurations

Search objects Overview Graph Object schema

Laptops
A place to store laptop information

Filter Search Advanced 25 1-10 of 10

T	Key	Asset Name	Created	Updated	Asset Tag	Serial Number	Model Name	Model ID	Manufacturer	Vendor	PO Number	Invoice Number	Unit Price	Purchase Date	Refresh Date	Asset Status	Assigned User
ITAS561-64	AT-8022101	26/Oct/22 4:37 PM	26/Oct/22 4:37 PM	AT-8022101	C02058XMAJ81	MacBook Pro M13-inch Laptop	MacBookPro13,1	Apple	2Zone	32181-4	INV709-4550	1399.5	13/Sep/21	No Value	13/Sep/21	Active	No Value
ITAS561-65	AT-8022102	26/Oct/22 4:37 PM	26/Oct/22 4:37 PM	AT-8022102	C02058W93EC	MacBook Pro M13-inch Laptop	MacBookPro13,1	Apple	2Zone	32181-4	INV709-4550	1399.5	13/Sep/21	No Value	13/Sep/21	Active	No Value
ITAS561-66	AT-8022103	26/Oct/22 4:37 PM	26/Oct/22 4:37 PM	AT-8022103	C0201HQ0332	MacBook Pro M13-inch Laptop	MacBookPro13,1	Apple	2Zone	32181-4	INV709-4550	1399.5	13/Sep/21	No Value	13/Sep/21	Active	Jennifer Fish
ITAS561-67	AT-8043101	26/Oct/22 4:37 PM	26/Oct/22 4:37 PM	AT-8043101	C0203vnd02h	MacBook Pro M13-inch Laptop	MacBookPro13,1	Apple	2Zone	32182-1	INV709-5957	1399.5	10/Sep/21	No Value	10/Sep/21	Active	Rhys Smithson
ITAS561-68	AT-8043102	26/Oct/22 4:37 PM	26/Oct/22 4:37 PM	AT-8043102	C0203vnd02h	MacBook Pro M13-inch Laptop	MacBookPro13,1	Apple	2Zone	32182-1	INV709-5957	1399.5	10/Sep/21	No Value	10/Sep/21	Active	No Value
ITAS561-69	ATM-8022110	26/Oct/22 4:37 PM	26/Oct/22 4:37 PM	ATM-8022110	H987U2V9C11	MacBook Pro with Apple M2 Chip	Mac14,7	Apple	2Zone	32389-2	INV709-6092	1299.5	18/Jun/22	No Value	18/Jun/22	Active	No Value
ITAS561-70	ATM-8022111	26/Oct/22 4:37 PM	26/Oct/22 4:37 PM	ATM-8022111	H987U2V9C11	MacBook Pro with Apple M2 Chip	Mac14,7	Apple	2Zone	32395-2	INV709-6092	1299.5	18/Jun/22	No Value	18/Jun/22	Active	No Value
ITAS561-71	ATM-8042103	26/Oct/22 4:37 PM	26/Oct/22 4:37 PM	ATM-8042103	C02058C6N02	MacBook Pro with Apple M2 Chip	Mac14,7	Apple	2Zone	32418-1	INV709-6168	1299.5	01/Feb/22	No Value	01/Feb/22	Active	Jennifer Fish
ITAS561-72	ATM-8111102	26/Oct/22 4:37 PM	26/Oct/22 4:37 PM	ATM-8111102	XYX838047	ThinkPad E16 Gen 3	20HQ	Lenovo	No Value	No Value	No Value	No Value	14/Jun/22	No Value	14/Jun/22	Active	No Value
ITAS561-73	ATM-8111109	26/Oct/22 4:37 PM	26/Oct/22 4:37 PM	ATM-8111109	XYX83827K	ThinkPad E16 Gen 3	20HQ	Lenovo	No Value	No Value	No Value	No Value	14/Jun/22	No Value	14/Jun/22	Active	No Value

And linked to employees.

Employees / Employees / EM-19
Jennifer Fish

Edit Comment More Object Graph Back to Object Type

Details

Name Jennifer Fish

Atlassian Account ID Jennifer Fish

Manager Name Rhys Smithson

Job Role Content Specialist

Email jfish@atlassian.com

Location Remote Workspace

Employment Type Contractor

Activity

Comments History

Created	Type	Actor	Old value	New value
25/Oct/22 10:52 AM	Changed Value	Jennifer Fish	Email	jfish@atlassian.com
25/Oct/22 10:46 AM	Added Value	Jennifer Fish	Employment Type	Contractor
25/Oct/22 10:46 AM	Created	Jennifer Fish		

Dates

Created 25/Oct/22 10:46 AM

Updated 25/Oct/22 10:52 AM

Inbound References

Laptops

Attachments

There are no attachments

Connected Jira Issues

Filter unresolved

No related issues found for specified filter

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

Select the Jira Service Management cog icon and select **Issues**.

The screenshot displays the Jira Service Management interface. At the top, the navigation bar includes 'Jira Service Management', 'Your work', 'Projects', 'Filters', 'Dashboards', 'People', 'Assets', 'Apps', and a 'Create' button. The 'Assets' section is active, showing 'Asset and configuration management' with a 'Configuration' gear icon. Below this is a search bar for object schemas. The 'Object schemas' table lists: Business Partners (BP) with 6 objects, Employees (EM) with 3 objects, Facilities (FAC) with 4 objects, IT Assets (ITASSET) with 10 objects, and Services (SVC) with 1 object. To the right, 'Recent objects' lists Jennifer Fish, AT-B022103, Blythe Smithson, Zones, and Apple. A settings overlay is open in the bottom right, showing categories: ATlassian Admin (User management, Billing), Jira Settings (System, Products, Projects, **Issues** - highlighted with a red box, Apps), and Personal Settings (Atlassian account settings, Personal Jira settings).

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	
Business Partners (BP)	6 objects
Employees (EM)	3 objects
Facilities (FAC)	4 objects
IT Assets (ITASSET)	10 objects
Services (SVC)	1 object

Recent objects

- Jennifer Fish
- AT-B022103
- Blythe Smithson
- Zones
- Apple

[View more](#)

Settings

ATLASSIAN ADMIN

- User management: Add users, groups, and manage access requests.
- Billing: Update your billing details, manage your subscriptions and more.

JIRA SETTINGS

- System: Manage your general configuration, global permissions, look and feel and more.
- Products: Manage your Jira products' settings and integrations.
- Projects: Manage your project settings, categories, and more.
- Issues**: Configure your issue types, workflows, screens, custom fields and more.
- Apps: Add and manage Jira Marketplace apps.

PERSONAL SETTINGS

- Atlassian account settings: Manage your language, time zone, and other profile information.
- Personal Jira settings: Manage your email notifications and other Jira settings.

In the **Issues types** pane, select **Custom fields** then click **Create custom field**.

Custom fields

You currently have 63 active custom fields. [Create custom field](#)

Filter by name or description

Name	Type	Screens and contexts	Last used
Actual end Date when the change actually ended.	📅 Date Time Picker	4 screens, 1 context	No information
Actual start Date when the change actually started.	📅 Date Time Picker	4 screens, 1 context	No information
Affected hardware	📄 Text Field (single line)	8 screens, 1 context	No information
Affected services LOCKED Link services from the service registry to an issue.	🔍 Unknown	16 screens, 1 context	Not tracked
Approvals LOCKED Provides search options for Jira Service Management approvals information. This custom field is created programmatically and required by Jira Ser...	👤 Approvals	1 context	Not tracked
Approver groups Contains groups of users needed for approval. This custom field was created by Jira Service Desk.	👥 Group Picker (multiple groups)	8 screens, 1 context	No information
Approvers Contains users needed for approval. This custom field was created by Jira Service Desk.	👤 User Picker (multiple users)	18 screens, 1 context	No information
Backup plan	📄 Text Field (multi-line)	4 screens, 1 context	No information
Category LOCKED Choose a category using a dropdown picker window.	🔍 Unknown	None	Not tracked
Change reason Choose the reason for the change request.	📄 Select List (single choice)	4 screens, 1 context	Oct 19, 2022
Change risk	📄 Select List (single choice)	4 screens, 1 context	Oct 19, 2022
Change type	📄 Select List (single choice)	4 screens, 1 context	Oct 19, 2022
[CHART] Date of First Response	📅 Date of First Response	1 context	Not tracked
[CHART] Time in Status	📅 Time in Status	1 context	Not tracked

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

Configure 'Assets objects' Field

Name*

Affected Laptop(s)

Description

Employee laptop(s) affected by issue

Previous [Create](#) 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 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	<input type="checkbox"/>
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 73 active custom fields [Create custom field](#)

Active Trashed			
<input type="text" value="affected"/>			
Name	Type	Screens and contexts	Last used
Affected hardware	Text Field (single line)	8 screens, 1 context	No information
Affected Laptop(s) <small>Employee laptop(s) affected by issue</small>	Assets objects	4 screens, 1 context	Not tracked
Affected services <small>LOCKED</small> <small>Link services from the service registry to an issue.</small>	Unknown	16 screens, 1 context	Not tracked

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.

- [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 scheme: [Edit Configuration](#)

Issue type(s):

- Global (all issues)

Assets object/s field configuration: [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

Select **IT Assets** as the **Object schema** and 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 object/s field configuration – Affected Laptop(s) (customfield_10063)

Field scope

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

Object schema *

IT Assets

Filter scope (AQL)

objectType="Laptops"

Filter issue scope (AQL)

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

i 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.

Allow search filtering by these attributes *

Assigned User x Asset Name x

Object attributes to display on 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.

- [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.

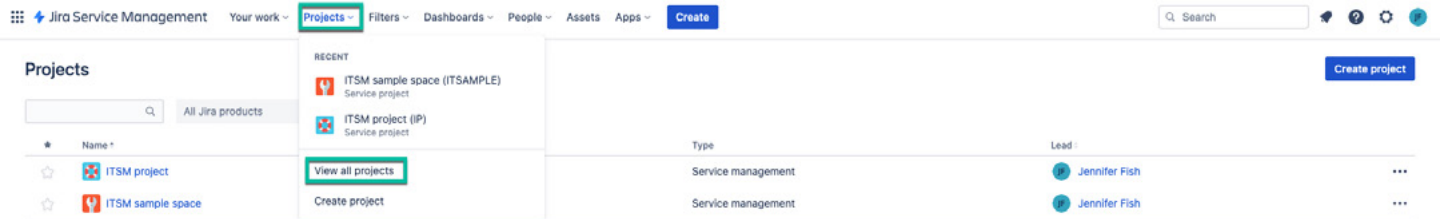
Example: "Belongs to Department"."Name" = HR

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.

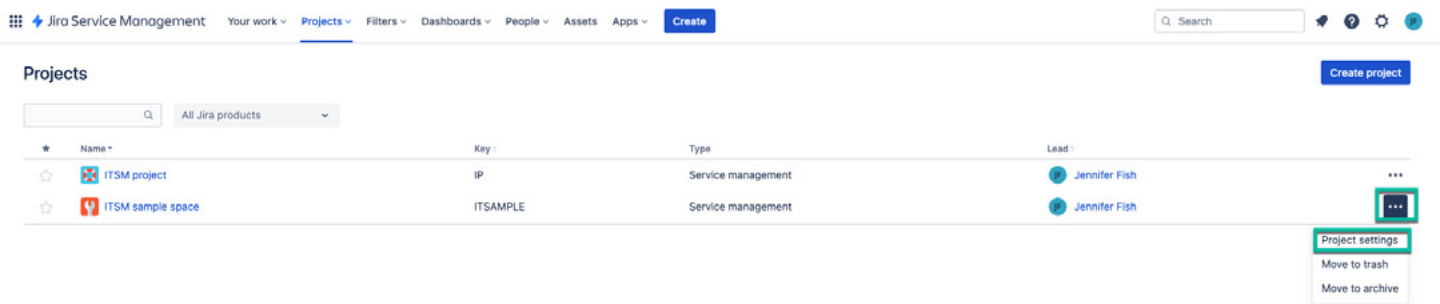
Note that since the referenced attribute contains spaces, it has been enclosed with a pair of double quotes.

Step 14 - Associate new custom fields with a project request

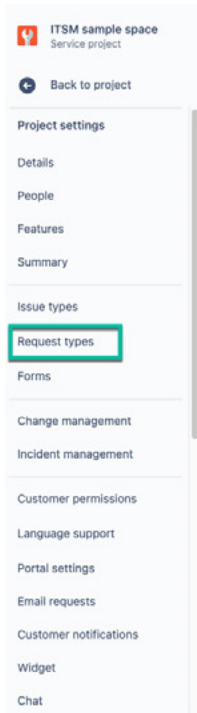
Select **Projects** option in the Jira Service Management main navigation bar and select **View all projects**.



Click on the **ellipse** icon and select **Project settings**.



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



Projects / ITSM sample space / Project settings

Details



Change icon

Name
ITSM sample space

Key
ITSAMPLE

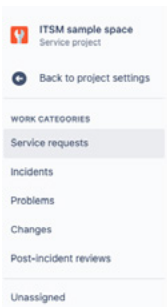
Category
Choose a category

Project lead
Jennifer Fish

Make sure your project lead has access to issues in the project.

Default assignee
Unassigned

Save



Projects / ITSM sample space / Project settings

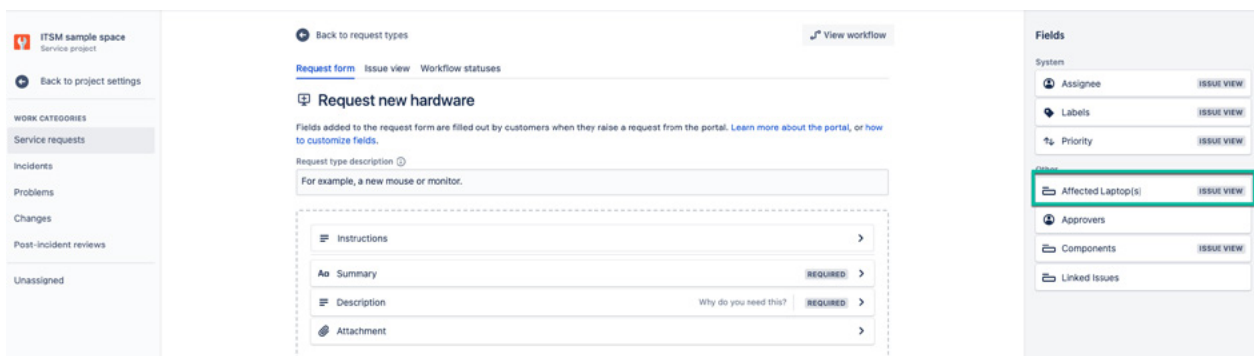
Service requests

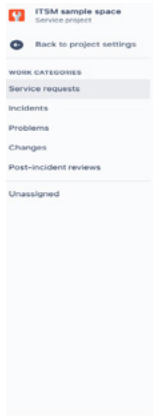
Create request type

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
Request new hardware For example, a new mouse or monitor.	[System] Service request	Computers

Locate the new custom field in the **Fields** pane, drag-and-drop the field to the **Request new hardware** 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

Affected Laptop(s) REQUIRED

Description Why do you need this? REQUIRED

Attachment

[Give feedback](#) [Discard](#) [Preview](#) [Save changes](#)

Fields

System

Assignee	Issue view
Labels	Issue view
Priority	Issue view

Other

Approvals	
Components	Issue view
Linked issues	

[Make existing fields available](#) ⓘ
[Create new custom fields](#) ⓘ
Refresh this page after adding or creating 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

Affected Laptop(s)

Search for Assets objects ▼

1 SEARCH RESULT

Jennifer Fish
AT-B022103

Attachment

Drag and drop files, paste screenshots, or browse

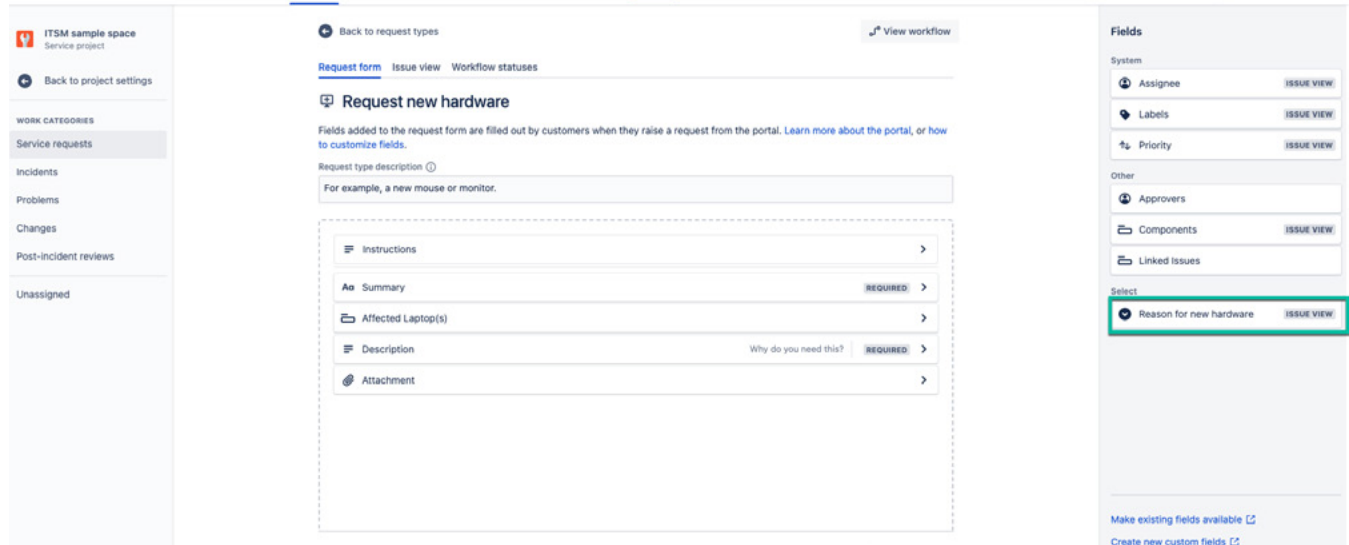
[Browse](#)

[Send](#) [Cancel](#)

Step 15 - Create automation for updating a laptop

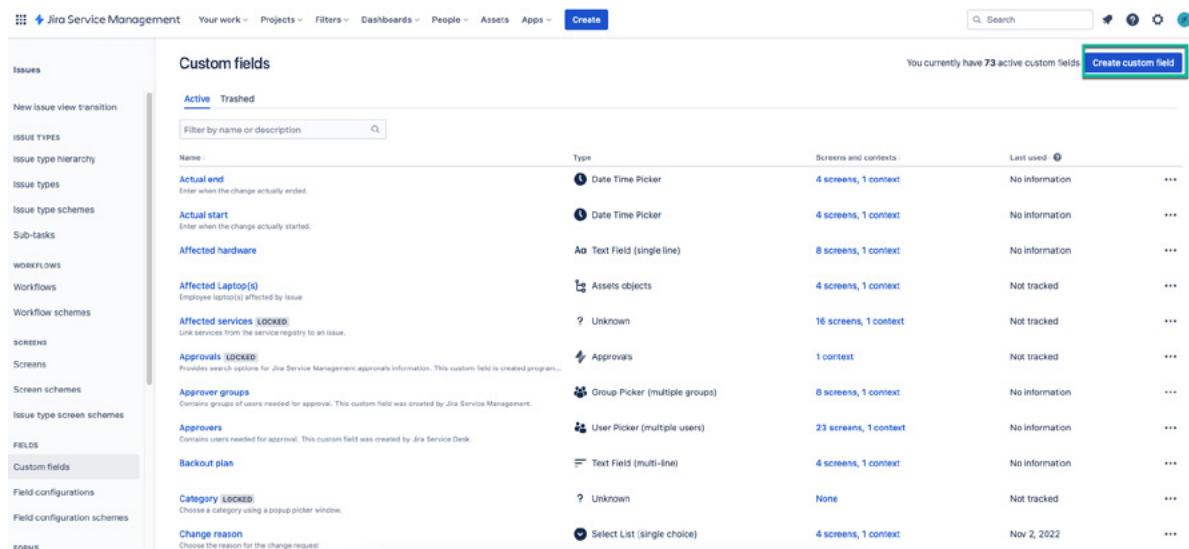
With the **Affected laptop(s)** field associated with the **Request new hardware** form, you can create automation to update assets when requests are submitted. In this step, let's create another custom field and define the automation steps.

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 Management. The form is titled 'Request new hardware' and has a 'Back to request types' link. The form is divided into sections: 'Request type description' (with a note 'For example, a new mouse or monitor.'), 'Instructions', 'Summary' (marked as 'REQUIRED'), 'Affected Laptop(s)' (marked as 'REQUIRED'), 'Description' (with a note 'Why do you need this?' and marked as 'REQUIRED'), and 'Attachment'. On the right side, there is a 'Fields' panel with a 'Select' dropdown menu. The 'Reason for new hardware' option is selected and 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 Management. The window has a sidebar with navigation links: Issues, New issue view transition, ISSUE TYPES, Issue type hierarchy, Issue types, Issue type schemes, Sub-tasks, WORKFLOWS, Workflows, Workflow schemes, SCREENS, Screens, Screen schemes, Issue type screen schemes, FIELDS, Custom fields, Field configurations, Field configuration schemes, and FORMS. The main area shows a table of custom fields. The 'Create custom field' button is highlighted with a red box.

Name	Type	Screens and contexts	Last used
Actual end Enter when the change actually ended.	Date Time Picker	4 screens, 1 context	No information
Actual start Enter when the change actually started.	Date Time Picker	4 screens, 1 context	No information
Affected hardware	Text Field (single line)	8 screens, 1 context	No information
Affected Laptop(s) Employee laptop(s) affected by issue	Assets objects	4 screens, 1 context	Not tracked
Affected services LOCKED Link services from the service registry to an issue.	Unknown	16 screens, 1 context	Not tracked
Approvals LOCKED Provides search options for Jira Service Management approvals information. This custom field is created programmatically.	Approvals	1 context	Not tracked
Approver groups Contains groups of users needed for approval. This custom field was created by Jira Service Desk.	Group Picker (multiple groups)	8 screens, 1 context	No information
Approvers Contains users needed for approval. This custom field was created by Jira Service Desk.	User Picker (multiple users)	23 screens, 1 context	No information
Backout plan	Text Field (multi-line)	4 screens, 1 context	No information
Category LOCKED Choose a category using a popup picker window.	Unknown	None	Not tracked
Change reason Choose the reason for the change request.	Select List (single choice)	4 screens, 1 context	Nov 2, 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

All
Standard
Advanced

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*

Asset lost or stolen Add

Asset lost or stolen X

New project X

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

New issue view transition
ISSUE TYPES
Issue type hierarchy
Issue types
Issue type schemes
Sub-tasks
WORKFLOWS
Workflows
Workflow schemes
SCREENS
Screens
Screen schemes
Issue type screen schemes
FIELDS
Custom fields
Field configurations

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.

Jira Service Management

Your work
Projects
Filters
Dashboards
People
Assets
Apps
Create

ITSM sample space

Service project

Back to project settings

WORK CATEGORIES

Service requests

Incidents

Problems

Changes

Post-incident reviews

Unassigned

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

Affected Laptop(s)

Description

Attachment

Give feedback

Discard

Preview

Save changes

Fields

System

Assignee

Labels

Priority

Other

Approvers

Components

Linked Issues

Select

Reason for new hardware

Make existing fields available

Create new custom fields

Refresh this page after adding or creating fields.

ITSM sample space
Service project

Back to project settings

WORK CATEGORIES

SERVICE REQUESTS

Incidents

Problems

Changes

Post-incident reviews

Unassigned

You're in a company-managed project

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

As Summary REQUIRED

Reason for new hardware

Affected Laptop(s)

Description Why do you need this? REQUIRED

Attachment

Give feedback Discard Preview Save changes

Fields

System

Assignee ISSUE VIEW

Labels ISSUE VIEW

Priority ISSUE VIEW

Other

Approvers

Components ISSUE VIEW

Linked issues

Make existing fields available ⓘ

Create new custom fields ⓘ

Refresh this page after adding or creating fields.

Help Center / ITSM sample space

Request new hardware

Raise this request on behalf of*

Jennifer Fish (jfish@atlassian.com)

Summary*

Laptop missing

Reason for new hardware

Asset lost or stolen

Affected Laptop(s)

AT-B022103 Jennifer Fish

Why do you need this?*

Normal text B I ... A v ☰ ☲ ☱ 🔗 @ ☺ < > ⓘ ” —

My car was broken into and the laptop was stolen from the trunk

Attachment

Drag and drop files, paste screenshots, or browse

Browse

Send

Cancel

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

The screenshot shows the Jira Service Management interface. On the left sidebar, the 'Project settings' option is highlighted with a red box. The main content area displays a list of open tickets under the 'ITSM sample space' project. The tickets are listed in a table with columns for Request Type, Reporter, Assignee, Status, Created, and Time to resolution. The first ticket is 'network difficulties experience' by Anonymous, assigned to Unassigned, with a status of 'PENDING' and a creation date of 01/Nov/22.

Request Type	Reporter	Assignee	Status	Created	Time to resolution
Report a problem	Anonymous	Unassigned	PENDING	01/Nov/22	2 Nov 11:57 AM
Report a problem	Jie Yan Song	Unassigned	PENDING	01/Nov/22	2 Nov 11:57 AM
Report a system problem	Jie Yan Song	Unassigned	OPEN	01/Nov/22	2 Nov 11:57 AM
Report a system problem	Alana Hansen	Unassigned	WORK IN PROGRESS	02/Nov/22	3 Nov 11:57 AM
Request a change	Omar Darboe	Unassigned	REVIEW	30/Oct/22	
Request a change	Automation Bot	Unassigned	IMPLEMENTING	30/Oct/22	
Request a change	Automation Bot	Unassigned	IMPLEMENTING	31/Oct/22	
Request a change	Alana Hansen	Unassigned	IMPLEMENTING	02/Nov/22	
Request a change	Alana Hansen	Unassigned	PLANNING	29/Oct/22	
Request a change	Anonymous	Unassigned	AUTHORIZE	02/Nov/22	
Request a change	Mia Ricci	Unassigned	AWAITING IMPLEMENTATION	29/Oct/22	
Investigate a problem	Anonymous	Unassigned	OPEN	29/Oct/22	
Investigate a problem	Anonymous	Unassigned	OPEN	02/Nov/22	

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

The screenshot shows the Jira Service Management Automation page. On the left sidebar, the 'Automation' option is highlighted with a red box. The main content area displays the 'Automation' section with a 'Create rule' button in the top right corner. Below the button, there is a section titled 'IT Service Management' with a list of automation rules. The first rule is 'When an issue is created → automatically assign using balanced workload'.

Automation Rule
When an issue is created → automatically assign using balanced workload
Resolve issues due to inactivity
When a customer comments on a closed request → then reopen the request
Set organization using reporter's email domain
When SLA threshold is about to breach → then add comment to notify assignee
When a comment is added → update the status
Prompt customer for comment

In the **New trigger** pane, select **Issue Created**, then click **Save**.

Projects / ITSM sample space / Project settings

Automation NEW

① Rule details

▶ New trigger
Select an event or schedule.

○ Add component

New trigger

Triggers start the execution of a rule. Triggers can listen for events or be scheduled to run.

All components ▼ Start typing to filter components

Recommended

- Field value changed
Rule is run when an issue's field value changes. [POPULAR](#)
- Issue commented
Rule is run when a new comment is added to an issue. [POPULAR](#)
- Issue created**
Rule is run when an issue is created. [POPULAR](#)

Issue triggers

- Field value changed
Rule is run when an issue's field value changes.
- Issue assigned
Rule is run when an issue is assigned to a user.
- Issue comment edited
Rule is run when an issue comment is edited.
- Issue commented
Rule is run when a new comment is added to an issue.
- Issue created
Rule is run when an issue is created.
- Issue deleted
Rule is run when an issue is deleted.
- Issue link deleted
Rule executes when an issue is unlinked from another issue.
- Issue linked
Rule executes when an issue is linked to another issue.

In the **Add component** pane, click **New condition**.

Projects / ITSM sample space / Project settings

Automation NEW

① Rule details

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

○ Add component

Add component

Components can either restrict execution by testing a condition, perform an action, or control flow by branching on related issues.

- New branch**
Create a separate section of this rule and perform actions and conditions on other items.
- New action**
Actions perform changes to a system.
- New condition**
Actions will only execute if all conditions preceding them pass.

In the **New Condition** pane, select **Issue fields condition**.

Projects / ITSM sample space / Project settings

Automation NEW

Rule details

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

▼ If: New condition
Select a condition to narrow the scope of your rule.

+ Add component

New condition

Actions will only execute if all conditions preceding them pass.

Recommended

Issue fields condition
Check whether an issue's field meets a certain criteria
POPULAR

All components

Advanced compare condition
Compares two values: {{issue.status.name}} equals Done

AQL condition
Checks whether the rule matches the query condition.

If / else block
Perform different actions using if, else-if and else to control the flow.

Issue fields condition
Check whether an issue's field meets a certain criteria

Related issues condition
Check if related issues exist or match JQL.

Affected services condition
Check if the affected services field matches certain criteria

Forms attached
Check if an issue has forms attached.

Issue attachments
Checks if issue attachments exist or don't exist

JQL condition
Checks if issue matches JQL.

User condition
User matches criteria: Reporter in group 'customers'

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

Field	Condition	Value
Request Type	equals	Request new hardware

Projects / ITSM sample space / Project settings

Automation NEW

Rule details

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

Request Type equals
Request new hardware

+ Add component

Issue fields condition

Checks whether an issue's field meets a certain criteria. [Learn more.](#)

Field *

Request Type

Condition *

equals

Value Field

Request new hardware

Cancel **Save**

In the **Add component** pane, click **New condition**.

Projects / ITSM sample space / Project settings

Automation NEW

Rule details

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

Request Type equals
Request new hardware

+ Add component

Add component

Components can either restrict execution by testing a condition, perform an action, or control flow by branching on related issues.

New branch
Create a separate section of this rule and perform actions and conditions on other items.

New action
Actions perform changes to a system.

New condition
Actions will only execute if all conditions preceding them pass.

In the **New** condition pane, click **Issue fields condition**.

The screenshot shows the 'Automation' section with a 'Rule details' pane on the left and a 'New condition' pane on the right. The 'New condition' pane has a 'Recommended' section where 'Issue fields condition' is highlighted with a red box. Below it, the 'All components' section lists other conditions like 'Advanced compare condition', 'Affected services condition', 'AQL condition', and 'Forms attached'.

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

Field	Condition
Affected Laptop(s)	is not empty

In the **Add component** pane, select **New condition**.

The screenshot shows the 'Automation' section with a 'Rule details' pane on the left and an 'Add component' pane on the right. The 'Add component' pane has a 'New condition' section where 'New condition' is highlighted with a red box. Below it, the 'New action' section lists other actions like 'New branch' and 'New action'.

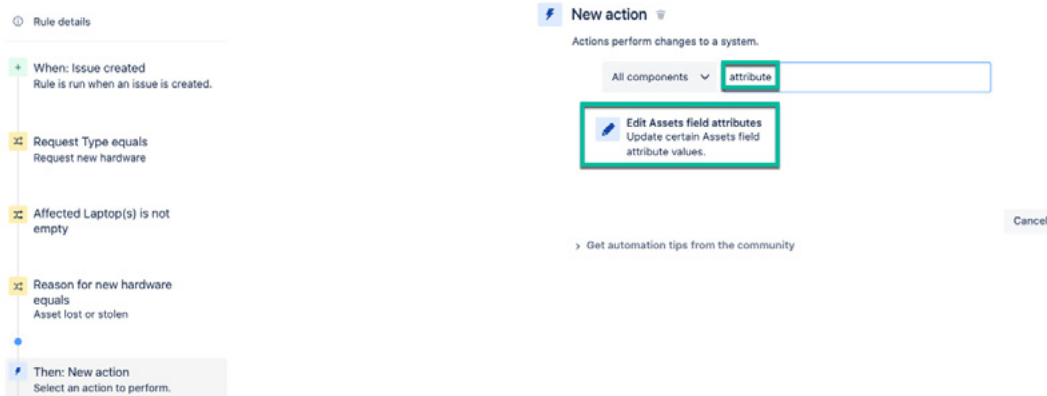
In the **Issue fields condition** pane, select the custom field and enter **Condition data**, then click **Save**.

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

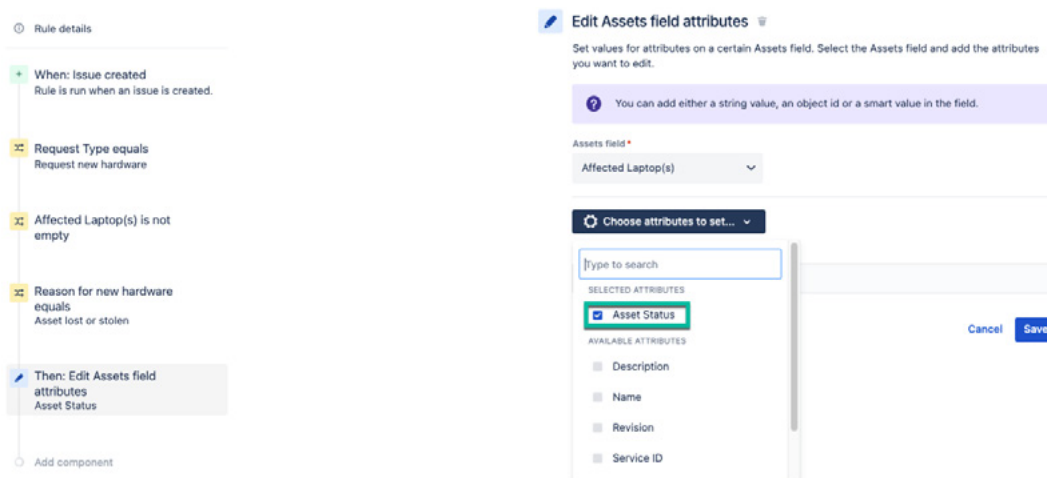
PRO TIP

Triggers are a powerful tool for keeping your Jira issues synchronized with **Assets** data. It is recommended 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.

In the **Add component** pane, select **New action**, 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** link, then select **Asset Status**.



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

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

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 Status

Missing

Cancel Save

In the **New component** pane, select **New action**, filter on “**comment**,” then select **Comment on issue**.

Projects / ITSM sample space / Project settings

Automation

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
- And: New action
Select an action to perform.

Add component

New action

Actions perform changes to a system.

All components comment

Comment on issue
Add a comment to an issue.

Delete comment
Remove a comment from an issue

Edit comment
Edit a comment on an issue.

Get automation tips from the community

Cancel

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**.

Comment

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

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=#F7D8C1|bgColor=#FFFFFF)The stolen/lost

+ Add component

Comment on issue

Please enter the comment to add:

Comment*

(panel:title=INFO|borderStyle=dashed|borderColor=#ccc|titleBGColor=#F7D8C1|bgColor=#FFFFFF)The stolen/lost laptop '{{issue.fields.Affected.Laptop(s){{issue.fields.Affected.Laptop(s)}}' 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

How do I access issue data in my comment?

The comment body can contain wiki markup.

You can use a number of issue fields in your text:

- {{reporter.displayName}} - returns the issue reporter's full name
- {{issue.fields}} - gives you access to all of the issue's fields
- {{comment.body}} - access the comment body (if provided)
- {{#changelog.priority}}{{fromString}} - {{toString}}{{/changelog.priority}} - allows access to specific field changes in issue update or transition events
- {{now}} - reference, manipulate and format dates

For example, the text on the left would produce the result on the right:

Text	Result
Hi {{creator.displayName}}, this issue has description '{{issue.fields.description}}'!	Hi Fred Flintstone, this issue has description 'Sample issue description'!

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, visit the following link:

[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**.

Automation

NEW

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

And: Add comment to issue
(panel:title=INFO|borderStyle=dashed|borderColor=#ccc|titleBGColor=#F7D6C1|bgColor=#FFFFFF)The stolen/lost

Add component

Add component

New branch
Create a separate section of this rule and perform actions and conditions on other items.

New action
Actions perform changes to a system.

New condition
Actions will only execute if all conditions preceding them pass.

OR

ITSAMPLE:Request new hardware-1-

Who can edit this rule? *

All admins

Turn it on

Automation

ENABLED

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=#FFFFFF)The stolen/lost

Add component

Add component

New branch
Create a separate section of this rule and perform actions and conditions on other items.

New action
Actions perform changes to a system.

New condition
Actions will only execute if all conditions preceding them pass.

OR

Your automation has been turned on

How was your automation experience?

👍 🗣️

Step 16 - Create a request for an employee laptop

Now you can create a request for an employee and select the employee's laptop. Access your customer portal by selecting **Channels** in the **service project sidebar** and clicking **Help Center/Open**. In the Help Center, search for **“new hardware”**, and select **Request new hardware** in your project.

The screenshot shows the Jira Service Management interface. On the left, the 'Channels' sidebar is visible, with 'Channels' highlighted. The main area displays a list of 'All open tickets' with columns for Request Type, Key, Summary, Reporter, Assignee, Status, Created, and Time to resolution. A 'Channels' dropdown menu is open, showing options like 'ITSM sample space', 'ITSM project', 'Help Center', 'Knowledge base', 'Reports', 'Assets & Media', 'Customers', 'Incident team', 'Workflows', 'Add shortcut', 'Project settings', and 'Give feedback'. The 'Help Center' option is highlighted.

The screenshot shows the 'Help Center' interface. At the top, there is a search bar with the text 'new hardware'. Below the search bar, there are two cards: 'ITSM sample space' and 'ITSM project'. The 'ITSM sample space' card has a 'Welcome! You can raise a request for ITSM sample space using the options provided.' message. The 'ITSM project' card has a 'Welcome! You can raise a request for ITSM project using the options provided.' message. The 'Help Center' title is visible in the top left corner.

new hardware

The screenshot shows the 'SEND A REQUEST ABOUT' section. There are two options: 'Request new hardware to ITSM project' and 'Request new hardware to ITSM sample space'. The 'Request new hardware to ITSM sample space' option is highlighted with a green border.

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

Request new hardware

Raise this request on behalf of*

Jennifer Fish (jfish@attlassian.com)

Summary*

My laptop was stolen and I need another laptop

Reason for new hardware

Asset lost or stolen

Affected Laptop(s)

Search for Assets objects

1 SEARCH RESULT

Jennifer Fish
AT-B022103

Attachment

Drag and drop files, paste screenshots, or browse

Browse

Send Cancel

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

My laptop was stolen and I need another laptop

JF Jennifer Fish raised this on Today 6:08 PM [Hide details](#)

Reason for new hardware

Asset lost or stolen

Affected Laptop(s)

AT-B022103

Why do you need this?

My car was broken into and my laptop was stolen. I need another laptop to continue working on an important project

Activity

AJ Automation for Jira Today 6:09 PM



INFO

The stolen/lost laptop 'ITASSET-66' was updated in the IT Assets schema and the Asset Status is set to Missing

Status

WAITING FOR SUPPORT

- Notifications on
- Escalate
- Resolve this issue
- Cancel request

Request type

+ Request new hardware

Shared with

JF Jennifer Fish
Creator

+ Share

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**.

The screenshot displays the ITSM system interface for a request titled "My laptop was stolen and I need another laptop".

Left Sidebar:

- ITSM sample space
- Service project
- Back to project
- All tickets
- STATUS
- TEAM PRIORITY
- All open tickets
- All my tickets
- Open tickets
- Manage queues
- Give feedback

Main Content Area:

Request Details:

- Reason for new hardware:** Asset lost or stolen
- Asset Name:** AT-8022103
- Serial Number:** CQD0HMQ332
- Assigned User:** Jennifer Fish
- Refresh Date:** 11/26/24
- Asset Status:** **Missing**

Description: My car was broken into and my laptop was stolen. I need another laptop to continue working on an important project.

Activity:

- ADD INTERNAL NOTE / Reply to customer**
- Automation for Jira** 7 minutes ago
- INFO** The stolen/lost laptop "ASSET-06" was updated in the IT Assets schema and the Asset Status is set to Missing.

Right Panel:

- SLAs:**
 - 14 Nov 05:06 PM: Time to resolution within 6h
 - Today 06:09 PM: Time to first response within 4h
- Pinned fields:** Click on the ID next to a field label to start pinning.
- Details:**
 - Assignee:** Unassigned
 - Reporter:** Jennifer Fish
 - Request type:** Request new hardware
 - Priority:** Medium
 - Labels:** None
 - Request participants:** None
 - Organizations:** None
 - Automation:** Rule executions

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, organizations can 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 [reach out to your local Atlassian Solution Partner](#) today.

