



# Getting Started with IT Asset Management

A Practical Approach to ITAM

Christine Morris & Teri Bobst | April 16, 2025



# Agenda

## Welcome & Introduction

1. What is Core Asset?
2. How Core Assets work with the CMDB
3. Model Categories Explained
4. Foundations: ITSM, CMDB & ITAM
5. Using Core Asset to Drive Value
6. Why HAM Pro & SAM Pro?
7. Q&A





# Cask NX is with clients for what comes next – on the platform and in their business.

**4.6** Customer Satisfaction Rating

**5.4K+** Certifications & Accreditations



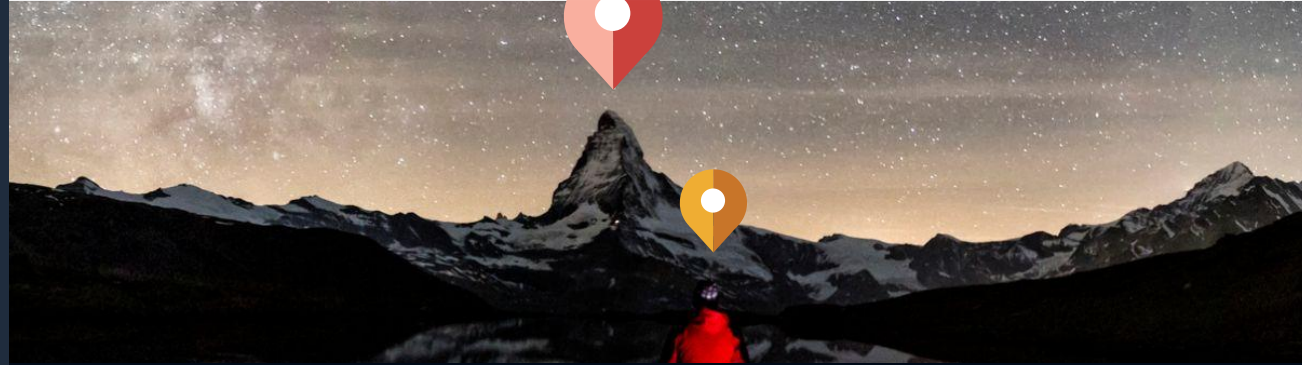
Validated Practice ✓ <b>IT Service Management</b> AMS	Validated Practice ✓ <b>Customer Service Mgmt</b> AMS	Validated Practice ✓ <b>Hardware Asset Mgmt</b> AMS	Validated Practice ✓ <b>Software Asset Mgmt</b> AMS	Validated Practice ✓ <b>ITOM Visibility</b> AMS	Validated Practice ✓ <b>Vulnerability Response</b> AMS	Validated Practice ✓ <b>Integrated Risk Management</b> AMS	Validated Practice ✓ <b>Hybrid Project Mgmt</b> AMS
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**8 VALIDATED PRACTICES** (Most of any Pure-Play Partner in AMS)

Product Line Achievement <b>Application Portfolio Management</b> AMS	Product Line Achievement <b>App Engine</b> AMS	Product Line Achievement <b>Human Resources</b> AMS
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**+3 PRODUCT LINE ACHIEVEMENTS**

Cask NX is the only pure play ServiceNow partner with dedicated, fully certified practices across the platform.



IT SERVICE MANAGEMENT



IT OPERATIONS MANAGEMENT



IT ASSET MANAGEMENT



STRATEGIC PORTFOLIO MANAGEMENT



EMPLOYEE WORKFLOW



CUSTOMER WORKFLOW



SECURITY & RISK



APP ENGINE

### STRATEGY

Strategic Roadmapping

Advisory Consulting

Platform Strategy & Governance

Demand Management

### TRANSFORMATION

App Modernization

UX & UI Design

Product Management

Org Change Management

Testing & Quality Engineering

Program & Project Management

Agile Transformation w/SAFe

### IMPLEMENTATION & APP DEVELOPMENT

Product Implementation

Platform Engineering

Data Management & Integrations

App Development

### OPERATIONS & ENHANCEMENT

Continuous Cloud Innovation

Platform Architecture & Engineering

Functional Process Execution

Cask Reserve

# Introductions



**Teri Bobst**  
Sr. Director,  
ITAM | ITOM | Security & Risk  
Cask NX



**Christine Morris**  
Sr. Director, Service Innovation  
ITSM | Platform | UI/UX  
Cask NX



# Join the Conversation: Using Zoom

## Turn on Video

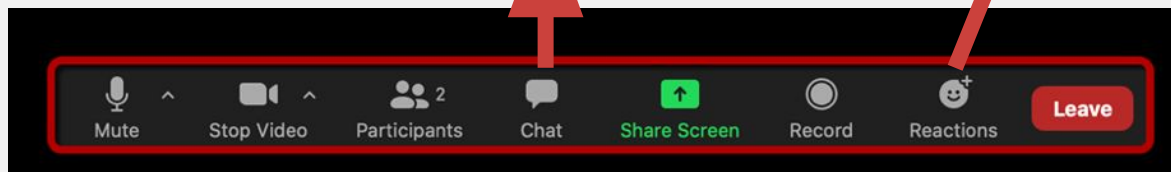
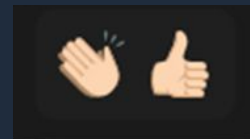
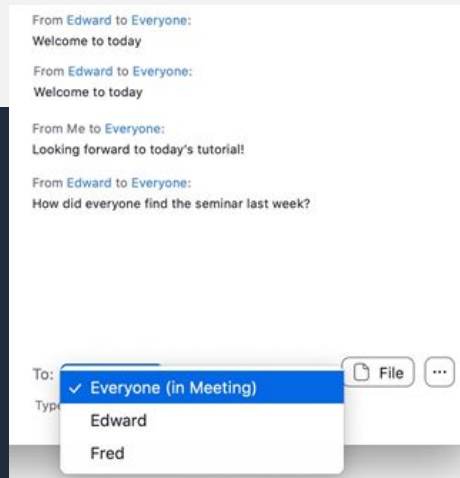
Let's get interactive and enjoy ourselves !

**Unmute** – Click the microphone icon to unmute and participate

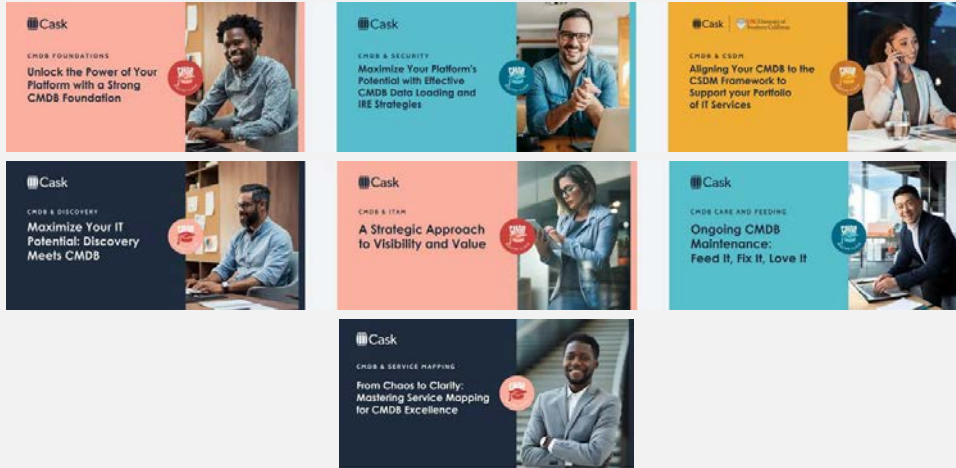
**Chat** – Message everyone or just one person

**Get Help** – Use Chat

**Show Captions** - Click on MORE, click Show Captions

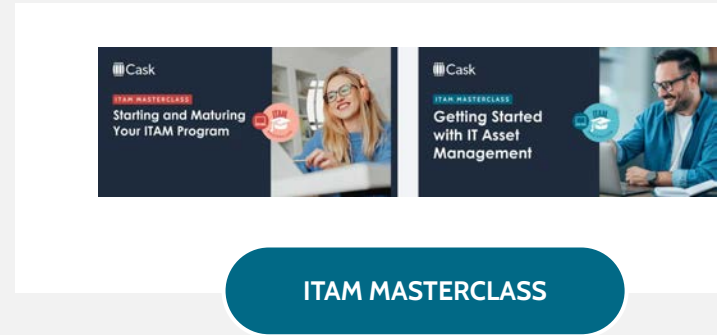


# Catch Up with our CMDB & ITAM MasterClass Series!



CMDB MASTERCLASS

Join for our 8th CMDB MasterClass on  
Event Management & AIOps June 10th!



ITAM MASTERCLASS

Join for our 3rd ITAM MasterClass on  
HAM Pro May 21st!

Find recordings, resources & more!







# What is Core Asset?





## AUDIENCE POLL

**How confident are you in your current asset inventory?**

- A We've got this on lock! 
- B We think we know what we have 
- C Jan has a spreadsheet... maybe? 
- D Confidence? LOL. We're in full asset anarchy 

# Core Assets as the foundation for HAM and SAM

**Core Asset** is the foundational building block for maturing your ITAM program into full-fledged Hardware Asset Management (HAM) and Software Asset Management (SAM) Pro. At its core, it provides essential data and processes to get your asset management journey started, making it easier to scale up to more advanced capabilities later on.

## For Hardware Asset Management (HAM)

- **Model Management:** Organize and track asset models, ensuring consistency across the organization.
- **Stockroom Inventory:** Maintain a clear view of inventory levels—who has what, and where it is.
- **Sourcing & Procurement:** Manage the lifecycle of asset acquisition, from purchase orders to asset receipt.
- **Asset Creation:** Automatically create asset records as new devices or hardware come into your environment.

## For Software Asset Management (SAM)

- **Model Management:** Basic tools to track and manage software models, ensuring accurate records.
- **Entitlement Creation:** Set up software entitlements (licenses, subscriptions, etc.) for better tracking and compliance.
- **Basic Reconciliation:** Compare installed software against purchased entitlements to identify gaps and risks.

# The Asset Workspace - Hardware Asset Overview

Hardware asset overview

## Hardware asset overview

**Important Actions** 22

Last refreshed: 2025-04-14 10:32:51 | Next scheduled refresh: 2025-04-15 10:30:00

- Model Management**  
**Fill in missing model number**  
1 model is missing a model number. Add this information for improved model data accuracy.  
Model count: 1  
[View records](#)
- Model Management**  
**Fill in missing useful life**  
80 models are missing useful life data. Add this information for improved model data accuracy.  
Model count: 80  
[View records](#)
- Model Management**  
**Fill in missing manufacturer**  
6 models are missing manufacturer data. Add this information for improved model data accuracy.  
Model count: 6  
[View records](#)
- Asset estate**  
**Fill in missing location**  
45 assets are missing location data. Add this information for improved asset data accuracy.  
Asset count: 45  
[View records](#)
- Asset estate**  
**Fill in acquisition method**  
944 assets have acquisition method set as none. Add this information for improved asset data...  
Asset count: 944  
[View records](#)
- Asset estate**  
**Fill in PO number**  
284 assets are missing a PO number. Add information for improved asset data accuracy.  
Asset count: 284  
[View records](#)

All locations ▾ All stockrooms ▾ All model categories ▾

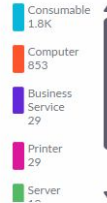
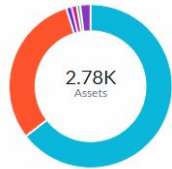
### Quick links

- Asset requests** 40  
[Asset dashboard](#)
- Transfer orders** 5  
[Inventory dashboard](#)
- Stock orders** 42  
[Inventory dashboard](#)

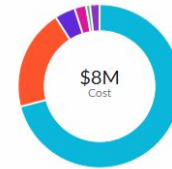
# The Asset Workspace - Hardware Asset Overview

360 asset view

Asset count by model category

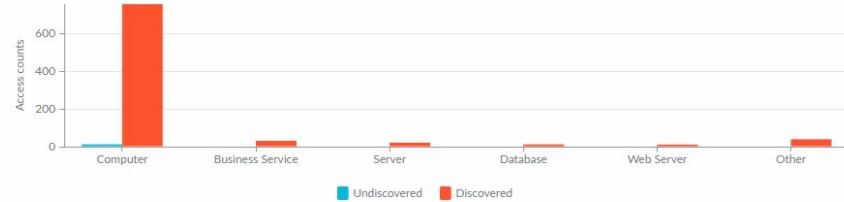


Asset value by model category



Overall performance

Discovered and undiscovered asset count



Undiscovered Discovered

Assets eligible for refresh by model category



No data available.

There is no data available for the selected criteria.

# The Asset Workspace - Inventory

The screenshot displays the 'Inventory' workspace in Cask. The top navigation bar includes 'Inventory' and sub-sections like 'Overview', 'All stockrooms', and 'Transfer orders'. A sidebar on the left contains navigation icons. The main content area features an 'Important Actions' section with 4 items, each with a 'View records' button. Below this is an 'Inventory overview' section with filters for 'Location', 'Stockroom', and 'Model category'. Two summary cards are visible: 'Open hardware requests from stock (YTD)' with a value of 0, and 'Open transfer orders' with a value of 5.

**Inventory**

Overview All stockrooms Transfer orders

**Important Actions** 4

Last refreshed: 2025-04-14 10:32:51 | Next scheduled refresh: 2025-04-15 10:30:00

- Inventory**  
**Fill in missing assignment group**  
9 stockrooms are missing an assignment group. Add this information for improved stockroom data.  
Stockroom count  
9  
[View records](#)
- Inventory**  
**Fill in missing manager**  
7 stockrooms are missing a manager. Add this information for improved stockroom data.  
Stockroom count  
7  
[View records](#)
- Inventory**  
**Fill in missing type**  
1 stockroom is missing type. Add this information for improved stockroom data.  
Stockroom count  
1  
[View records](#)
- Inventory**  
**Fill in missing stockroom on asset**  
1 in stock asset is missing stockroom. Add this information for improved asset data accuracy.  
Asset count  
1  
[View records](#)

**Inventory overview**

Location Stockroom Model category

Open hardware requests from stock (YTD) 0

Open transfer orders 5

# The Asset Workspace - Asset Estate

Asset estate

## Asset estate

[New asset](#)

[Overview](#) [All assets](#) [Hardware assets](#) [Consumable assets](#) [Software licenses](#) [Other assets](#) [Asset tasks](#)

### Important Actions 6

Last refreshed: 2025-04-14 10:32:51 | Next scheduled refresh: 2025-04-15 10:30:00

#### Asset estate

**Fill in missing location**  
45 assets are missing location data. Add this information for improved asset data accuracy.

Asset count  
45

[View records](#)

#### Asset estate

**Fill in acquisition method**  
944 assets have acquisition method set as none. Add this information for improved asset data accuracy.

Asset count  
944

[View records](#)

#### Asset estate

**Fill in PO number**  
284 assets are missing a PO number. Add this information for improved asset data accuracy.

Asset count  
284

[View records](#)

#### Asset estate

**Fill in missing asset tag**  
47 assets are missing an asset tag. Add this information for improved asset data accuracy.

Asset count  
47

[View records](#)

#### Asset estate

**Fill in asset function**  
2740 assets have asset function set as none. Add this information for improved asset data accuracy.

Asset count  
2740

[View records](#)

#### Inventory

**Fill in missing stockroom on asset**  
1 in stock asset is missing stockroom. Add this information for improved asset data accuracy.

Asset count  
1

[View records](#)

### Asset Overview

[Location](#) [Stockroom](#) [Model category](#)

Hardware warranty expiration this year

240

Asset requests

40

#### Asset lifecycle by state

2.78K Assets

State	Count
Consumable	1.77K
In use	866
In stock	109
On order	30

#### Asset count by model category

2.78K Assets

Category	Count
Consumable	1.8K
Computer	853
Business Service	29
Printer	29
Server	-

Cask

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# The Asset Workspace - Model Management

Model management

## Model management

Overview All models Hardware models Consumable models Bundled models Contract models Software models

**Important Actions** 3

Last refreshed: 2025-04-14 10:32:51 | Next scheduled refresh: 2025-04-15 10:30:00

Model Management

**Fill in missing model number**

1 model is missing a model number. Add this information for improved model data accuracy.

Model count  
1

[View records](#)

Model Management

**Fill in missing useful life**

80 models are missing useful life data. Add this information for improved model data accuracy.

Model count  
80

[View records](#)

Model Management

**Fill in missing manufacturer**

6 models are missing manufacturer data. Add this information for improved model data accuracy.

Model count  
6

[View records](#)

### Model overview

Model category

Hardware models up for end of life this year

0

Consumable models up for end of life this year

0

Missing data

Model name  
0

Manufacturer  
6

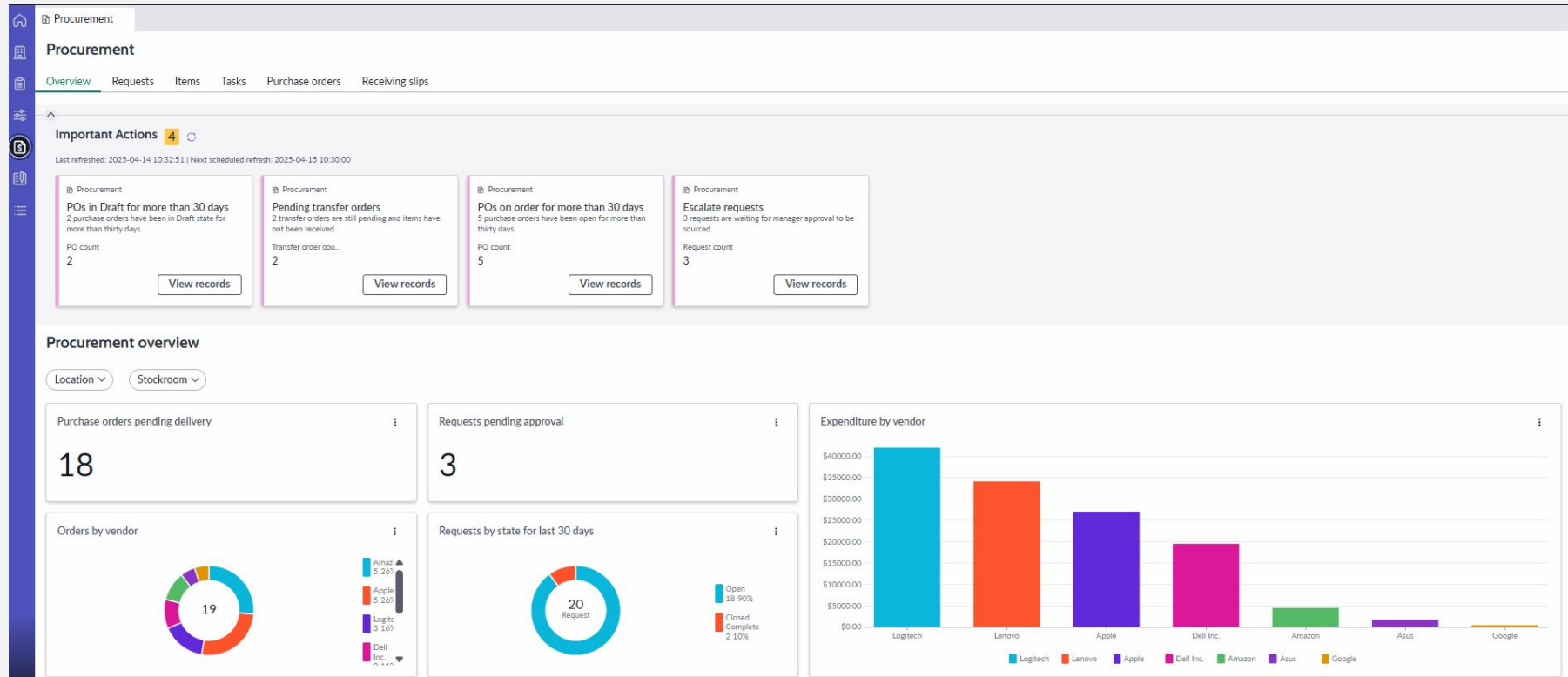
Model number  
1

Product model status

188

- Software Model 92
- Hardware Model 81
- Consumable Model 15

# The Asset Workspace - Procurement



# The Asset Workspace - Contract Management

Contract management
New contract

**Contract management**

Overview | All contracts | Leases | Insurance | Maintenance | Warranties | Purchasing agreements | Purchase orders | Service | Software licenses | Subscriptions | Non-Disclosure | My contracts | My approvals | Terms and conditions

**Important Actions** 6 🔄

Last refreshed: 2025-04-14 10:32:51 | Next scheduled refresh: 2025-04-15 10:30:00

Contract management

**30 days to renew contracts**  
3 contracts need to renew in 30 days.

Contract count  
3

View records

Contract management

**90 days to renew contracts**  
4 contracts need to renew in 90 days.

Contract count  
4

View records

Contract management

**Duplicate contracts**  
4 duplicate contracts.

Contract count  
4

View records

Contract management

**Fill in missing contract administrator**  
30 contracts are missing contract administrator. Add this information for improved contract data...

Contract count  
30

View records

Contract management

**Fill in missing end date**  
4 contracts are missing end date. Add this information for improved contract data accuracy.

Contract count  
4

View records

Contract management

**Fill in missing vendor**  
5 contracts are missing vendor data. Add this information for improved contract data accuracy.


Contract count  
5

View records

**Contract overview**

Type ▾
Vendor ▾

Contract expenditure by type



\$3.24K

Contract

**Expiring contract** 🔍

Last refreshed 1m ago

Number	Contract model	Vendor	Name	End date ▲ ▼
CNTR0010062	Purchase Order	Asus		2025-04-19
CNTR0010061	Insurance	Amazon		2025-04-27
CNTR0010049	Lease	(empty)		2025-05-06
CNTR0010063	Insurance	APC		2025-05-30



# How Core Assets work with the CMDB



# Core Assets and the CMDB

When launching an ITAM program, one truth stands above the rest: **the asset comes first**. It's what you **plan** for, **budget** for, **purchase**, and ultimately **deploy** to meet your organization's needs. The asset lifecycle kicks off before that hardware or software ever becomes a blip on your CMDB radar.

## From Asset to CI: The Lifecycle Shift

Once an asset is in use, it transitions into its role as a **configuration item (CI)**. At this point, Discovery (or other integration sources) steps in to maintain operational visibility via the CMDB. This is where the two records—Asset and CI—start dancing together.

### CMDB visibility gives you the who, what, and where

- Who's using it
- What's installed
- What it's connected to
- Whether it's online, and more

### Asset focuses on

- Ownership
- Financial data
- Contractual obligations
- Procurement history
- Lifecycle status



## ACTION ITEM

# Reality Check

## You Probably Already Have Asset Records

Most orgs new to ITAM don't start from zero. You likely have asset records that were **automatically created from CI records**. These are a solid starting point—but they need some love.

Go back and update those asset records with actual asset data. The more detail you add—especially around cost, vendor, ownership, and warranties—the more value you unlock for the entire lifecycle.

**The goal?**

**Turn a loosely tracked device into a fully managed business asset. That's where the magic (and ROI) begins.**



# Model Categories: The Glue That Holds It All Together



# Model Categories: The Glue That Holds It All Together

Ever wonder, "Why do I already have asset records when no one's created them?"

**Enter: Model Categories.** They're the secret sauce that connects the dots between your asset and CI records in ServiceNow.

## What Are Model Categories?

In ServiceNow, Model Categories serve as the bridge between:

- **Asset Classes (like Hardware or Software)**
- **CI Classes (like Computer, Server, or Installed Software)**

They define how an asset and its corresponding CI are related—and more importantly, how they get created and kept in sync.

## Two-Way Sync Magic

- When an asset is created first (say through procurement or stockroom processes), the Model Category determines which CI class should be created to represent it in the CMDB.
- When a CI is created first (like from Discovery), the Model Category helps ServiceNow create the appropriate asset record, linking the two for lifecycle tracking.

# Why You Should Care

If your organization is creating custom model categories—which is often necessary for unique asset types or bespoke CIs—it is absolutely critical to understand how the pieces fit together.

Because if you get it wrong? You could end up with mismatched records, broken sync rules, and some very cranky asset managers (and you know they don't forget).

## SYNCHRONIZATION RULES

Once both the Asset and CI records exist, Asset-CI Sync Rules kick in to keep them aligned throughout the lifecycle:

- Location changes
- Ownership updates
- Status transitions
- And more

Done right, this setup creates a seamless data thread from procurement to retirement. Done wrong... well, let's just not do it wrong, yeah?

## AUDIENCE POLL

How are assets typically added to your system?

- A Through a streamlined, mature procurement process 😊
- B Manually... by Jan... when she remembers 📝
- C Magic. They just show up. 🧙
- D Added? We don't track anything—YOLO 🐵

# ITSM, CMDB, and ITAM – The Basics





# Connecting back to ITSM

So how does all this Core Asset, CI syncing, and model category goodness actually connect back to ITSM?

Short answer: In more ways than you probably realize.

**Long answer? Let's break it down.**





# Request Management & the Service Catalog



The Service Catalog is where it starts for your end users—but it should also be where ITAM has a seat at the table.



Designing a model-based catalog (instead of free-form product requests) ensures you're only offering approved, supportable, and tracked assets.



Add required variables to requests—like needed location, user type, or justification—and your ITAM team gets exactly what they need, without a bunch of back-and-forth.


Do it right once in the catalog = fewer reworks, faster fulfillment, and fewer angry Teams messages.

# Catalog and Sourcing

servicenow All Favorites History Workspaces Admin **Latitude 5490**

< Service Catalog > Hardware > Latitude 5490


### Business Class 14" Dell Latitude



Brand	Dell
Model Name	Latitude 14-5000 5490
Screen Size	14 Inches
Color	Black
Hard Disk Size	256 GB
CPU Model	Core i5
Ram Memory	16 GB
Installed Size	
Operating System	Windows 10 Pro 64-Bit
Special Feature	Speakers
Graphics Card	Integrated
Description	

< Source Request Submit

Consolidate PO Line with open POs

 <b>Latitude 5490</b> RITM0010003 Total Requested 1 Requested for Teri Bobst Location 2200 Powell Street, San Francisco, CA	To be Sourced <b>1</b>	Local Stock <b>4</b> Consume	Transferable Stock <b>0</b> Transfer	Vendor Purchase <b>1</b> Purchase
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# Incident & Change Management



## Linking CI records to incidents and changes adds rich context:

- See repeat issues tied to specific hardware models (hello, early retirement 🍌).
- Track device usage history over time—who had it, what broke, what was fixed.



This visibility helps your Service Desk, Problem Management, and Change Managers make better, faster decisions.

Do it right once in the catalog = fewer reworks, faster fulfillment, and fewer angry Slack messages.

# End User Support



When ITAM is aligned with ITSM and CMDB, you're not just managing tickets—you're managing experiences.



Knowing what assets a user has, how old they are, what's been done to them... it's like having a user support crystal ball 🌐.

Better support decisions = better outcomes = happier humans = less churn.

# So... What Can I Do With Core Assets?



## LAY THE FOUNDATION FOR ITAM MATURITY

Start with the basics and scale to HAM Pro and SAM Pro when you're ready—without redoing everything.

## IMPROVE FULFILLMENT & SERVICE DELIVERY

Use model-based catalog items and smarter request variables to streamline procurement and reduce rework.

## SYNC WITH THE CMDB FOR FULL VISIBILITY

Automatically tie asset and CI records together using model categories and sync rules to stay aligned across lifecycle stages.

## ENHANCE INCIDENT & CHANGE MANAGEMENT

Track device-level issues, spot problematic models, and understand the full impact of changes on deployed assets.

## SUPPORT END USERS LIKE A PRO

Know who has what, what's been done to it, and what's likely to go wrong—so you can support your people proactively.

## ENABLE REPORTING & STRATEGIC DECISION-MAKING

Start capturing ownership, lifecycle, financial, and contractual data now—because that's the fuel for smarter ITAM decisions later.





## Core Asset (Baseline)

# Then Why Do I Need HAM Pro and SAM Pro?

Core Asset is your **starter kit**—perfect for tracking, inventory, and getting your feet under you. But if you want **automation, scalability, and strategic impact**, here's why you upgrade:

Manual lifecycle updates

Basic inventory management

Some CI syncing (if configured)

Great starting point, but still requires hands-on effort

# Then Why Do I Need HAM Pro and SAM Pro?

Core Asset is your starter kit—perfect for tracking, inventory, and getting your feet under you. **But if you want automation, scalability, and strategic impact, here's why you upgrade:**





## **HAM Pro** (Hardware Asset Management Professional)

Think: from spreadsheets and guesswork  
to **automated, audit-ready precision**

- ✓ **Fully automated lifecycle flows**
  - No more manual status updates at every stage
- ✓ **Model normalization**
  - Clean, consistent data across records
- ✓ **Lifecycle content packs**
  - Pre-built templates, flows, and logic for devices
- ✓ **Ongoing enhancements from ServiceNow**
  - New features, tighter integrations, smarter flows

## **SAM Pro** (Software Asset Management Professional)

From “do we have licenses?” to  
**“here's exactly what we own, use, and need to reduce”**

-  **SaaS Visibility & Management**
  - Discover shadow IT, optimize subscriptions
-  **Advanced Reconciliation**
  - Match installs vs. entitlements like a licensing wizard
-  **Model Normalization**
  - Clean up vendor, product, and version chaos
-  **Lifecycle Stage Automation**
  - Know where your software lives in its usage lifecycle

## AUDIENCE POLL

# Why haven't you implemented HAM Pro/SAM Pro yet?

- A Budget? In this economy? 🇺🇸
- B Leadership doesn't get it and neither does Jan 😐
- C We're still trying to survive Core Asset 🤪
- D I didn't know I needed it until today 😬

# Summary



# Getting Started Is Easy!

Cask meets you where your ITAM is today

Start your journey with our HAM foundations and SAM foundations



SAM | HAM  
FOUNDATIONS

Cask's HAM Essentials™ jumpstarts HAM-P in ServiceNow, giving you visibility into your hardware assets



HAM  
ESSENTIALS

Cask's SAM Essentials™ sets up SAM-P in ServiceNow for software visibility, cost optimization, and automation



SAM  
ESSENTIALS

SAM and HAM Expert Assist is a subscription service providing ongoing expert support to help optimize your ITAM solution.



SAM | HAM  
EXPERT ASSIST

Tell us what ITAM topics you want to learn more about!

*Look for a survey following this session!*



Next **ITAM MasterClass**: HAM Pro  
Wednesday, 5/21!

Next **CMDB MasterClass**: Event  
Management & AIOps  
Wednesday, June 11!

Take our quiz to discover your **AI Superhero persona** and enter into a drawing for a **free AI Visible Value Engagement** valued at **\$25,000 USD**.

Questions?





# Thank you!

Questions?

Email: [Stephanie.edelman@caskllc.com](mailto:Stephanie.edelman@caskllc.com)

