SERVICE ASSET AND CONFIGURATION MANAGEMENT (SACM) PLAN
FOR […]

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**Comment [BV1]:** All fields in this document marked by square brackets ( ) must be filled in.

**Comment [BV2]:** SACM Plan can be made for a project, service or group of services or projects. Depending on the context, enter valid name here and include it (to easily distinguish between plans) in file name.

**Comment [BV3]:** The document coding system should be in line with the organization's existing system for document coding, in case such a system is not in place, this line may be deleted.
Change history

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1. Introduction

1.1 Executive summary

[The executive summary is a high level description of the plan details. By reading the executive summary, someone who is not familiar with the details should get a clear picture about current and forecasted availability of services and components.]

1.2 Definition

[Configuration Item

Configuration Management System

Configuration Management Database...etc.]

2. SACM Plan

2.1 Scope of the SACM

The scope of the SACM covers [this is where you define it could be all services (reference the list of services – see Service Portfolio in Appendix of Service Portfolio Management) infrastructure...etc.]

CI categories that are within the scope are:

<table>
<thead>
<tr>
<th>CI Category</th>
<th>Category Level 1</th>
<th>Category Level 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Lifecycle Cls</td>
<td>Business Case</td>
<td></td>
</tr>
<tr>
<td>Service Design Package</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incident Management process</td>
<td></td>
<td></td>
</tr>
<tr>
<td>[employee name]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ERP</td>
<td>Bookkeeping</td>
<td></td>
</tr>
<tr>
<td>Controlling module</td>
<td>Hard Disc</td>
<td></td>
</tr>
<tr>
<td>[Room location and number]</td>
<td>RAM</td>
<td></td>
</tr>
<tr>
<td>[service name] – Service Acceptance Criteria</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2.2 Regulation

Internal and external regulations have a significant influence on the SACM. Policies which impact the SACM are:

- List of policies which influence SACM
- [...]

Standards which influence the SACM:

- [ISO20000]
- [...]

The following internal standards are relevant to SACM:

- [hardware standards]
- [software standards]
- [business standards]
- [Procurement standard]
- [...]

2.3 References

[This is one of the most important parts of this plan. List references where you will get data. Make reference sources <-> services.]

2.4 Organization

The SACM is supported by resources, inside as well as outside of the SACM process structure. The following resources (with their responsibilities) support the SACM:

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>[librarian]</td>
<td>[documenting, entering all data in [tool name]]</td>
</tr>
<tr>
<td>[Change Advisory Board]</td>
<td>[Authorizing significant changes which have influence on CI]</td>
</tr>
<tr>
<td>[role description]</td>
<td>[Authorization for establishing baseline]</td>
</tr>
</tbody>
</table>

2.5 System and Tools

[Describe here which activities and roles of the SACM process are needed for:]

- Configuration identification
• Interface to processes, systems and respective roles

Tools that support the SACM:
• [enter tools that you use, e.g. discovery tools to detect CIs and gather data, e.g. ERP, CMDB]

2.6 Processes which are in relationships with the SACM

[List, and explain relationship, i.e. processes which use SACM or ones which SACM needs, e.g.:
• Change Management – CIs that are within the scope of the plan are used by the Change Management process to evaluate and authorize changes. The Change Management process authorizes all changes on CIs which are within the scope of the SACM Plan.
• Release and Deployment Management (RDM) – RDM uses information about CIs within the scope of the SACM Plan to plan, build and deploy releases.
• ...

2.7 Nomenclature

[In this section you will explain which nomenclature you use, i.e. how CIs will be identified. Try to be descriptive and logical, e.g.

Computer:

<Laptop/Desktop> <Type (1,2,3 according to e.g. asset policy)> <location> >sequence>

i.e. LAP-TYP1-Room number-1234]

2.8 Baseline and verification

A baseline should be set when the SACM is first implemented, and regularly [once a year] afterwards by [role description].

After the baseline is set, the CMDB audit is carried out by [role description] [once every quarter]. [Service Asset and Configuration Manager].

2.9 Definitive Store and DML

Definitive spares are stored at [...] and managed by [role description].

The Definitive Media Library (DML) is organized in the following way:
• [...]
• Physical media are stored in [...].

[role description] is responsible, with regard to the definitive store and DML, for:
• Scope, i.e. to ensure that documentation, license information, software and, where applicable, images of the hardware configuration are stored in the DML or definitive store...
• Definition of naming convention of physical media and components, as well as the store, in a way that content of the definitive store and DML corresponds to identification of configuration records (i.e. CIs with all attributes and relations)
• Security – to define access control in a secure environment, backup and recovery, access to soft copies, entry and exit criteria
• To clarify and ensure that retention periods are in place

2.10 Change control

There is a strong connection between the SACM and the Change Management process. No changes on CIs should be made without control of the Change Management process. The Change Management Process defines how changes are performed.

[This is best practice. Change if needed, but a connection between the SACM and the Change Management process should exist, and should be described.]

[role description] is responsible for ensuring that information from the CMDB is provided to the Change Management process, to support the assessment of requests for change. To achieve that, the following are carried out:

• SACM Manager is a constituent part of Change Management Board
• SACM Manager ensures that operational staff involved in Change Management Process have access to CMDB
• [...]

[job title]

[name]

[signature]

Comment [BV15]: Only necessary if the Procedure for Document Control prescribes that paper documents must be signed.