

# Tagging in 7 Steps

## Practical Guide for Tagging Your IT Assets

Best-practice IT Asset Management (ITAM) stresses the importance of maintaining a complete and accurate Configuration Management Database (CMDB), or Asset Repository, that is kept up-to-date in a timely fashion. As the heart of ITIL Service Management, the quality of your CMDB determines the quality of your IT Service Management processes. i.e. better information about the assets in your environment ensures quicker turnaround on Incidents and Problems, shortens the cycle time to implement Changes, reduces the risk of introducing errors during environment changes, aids in capacity planning, etc. Having the processes in place to maintain a complete, accurate, and up-to-date asset repository is the foundation of a well-functioning IT organization.

Because most IT Asset Management activity is performed by a mobile workforce, your ITAM processes must support the staff that roams through your data centers, buildings, labs, and warehouses, installing, tracking, moving, upgrading, fixing, and simply managing equipment so that your business can operate efficiently day after day. Furthermore, it is critically important that updates occurring in the environment are accurately reflected in the CMDB. One of the key components to driving effective Asset Management is creating Asset IDs and using Asset Tags to identify and track your company's key IT assets. This paper reviews efficient and optimal usage of Asset Tags in your IT environment.

### *Steps in the Asset Tagging Process*

Although Asset Tagging seems quite simple and straightforward, a well-planned approach will ensure optimal usage, longevity, and efficiency for your IT Staff. The following 7 steps represent what it takes to deploy an effective Asset Identification procedure:

1. Identify all assets that need or will need to be tagged.
2. Determine an Asset ID schema for identifying your assets.
3. Choose and acquire Asset Tags to affix to your assets.
4. Acquire barcode scanners and associated software to read Asset Tags and aid in asset management procedures.
5. ID and Tag all of your existing assets.
6. Create or modify a process to ID and Tag all of your

incoming assets.

7. Create or modify daily Asset Management processes to incorporate Asset Tags.

### **Identify Assets**

Determine which assets in your environment need or will need to be ID'ed and tagged. For each different type of asset, identify the best location and method for affixing an Asset Tag onto the asset. In addition to computer equipment, also consider creating Asset Tags for people (typically affixed to badges), furniture, tools, machines, etc. You will want to tag assets that are important to your business, and that are (or will be) tracked in your CMDB or Asset Repository.

### **Determine an Asset ID schema**

Assigning Asset IDs to the assets that you want to track in your CMDB gives you the opportunity to create a structured and well-formed identification system to uniquely identify each asset in your environment. Taking into account all of the assets in the environment that you wish to track, you should define an Asset ID schema that is both meaningful and simple. The best approach is usually a sequential numerical ID with a short character prefix to identify the value as an Asset ID. Avoid creating tags with location- or ownership-specific assumptions, because those characteristics may change during the lifetime of the asset.

### **Choose and Acquire Asset Tags**

The type (or types) of tags that you want Asset IDs printed on will be determined by the type of assets being tagged, and the environment where those assets reside. For each type of asset, define exactly where the Asset Tag should be affixed, and then determine the optimal size of the tag and appropriate adhesive for the material that it will be affixed to. All Asset Tags should have the Asset ID printed on them along with a barcode so that the tag can be quickly and accurately read using a barcode scanner, an important tool for your mobile asset technicians.

In some environments, you might use a Radio Frequency Identification (RFID) system for all or part of your IT Asset



Management. In this case, you will want to coordinate your RFID tags with any non-RFID Asset IDs. You will also want to ensure that the Asset ID emitted by the RFID tag is also printed and barcoded right on the RFID tag itself for easy and immediate reading by your IT Staff.

If you are creating different Asset ID schemas for different types of assets, choose a different size and/or color tag for each different scheme to ensure easy differentiation for your IT Staff. You can either purchase pre-printed Asset Tags or blank tags if you own or purchase a Barcode label printer.

### Acquire Barcode Scanners

Barcode scanners are available in many different form-factors, sizes, and capabilities. The primary factors in choosing an appropriate scanner are:

- One that will support your chosen barcode scanning software program(s), which provides a user interface to your IT Staff and integrates with your backend CMDB or Asset Repository.
- One that can handle the environment that it will be used in. For example, if it will be used in a warehouse, you will want to consider a hardened unit that will not break if it is dropped.
- One that supports the type of activities that will be performed by the IT Staff. For example, if your users will be scanning barcodes from a distance greater than one foot, you should ensure that the scanner is a strong laser with very good distance reading.

### Tag Existing Assets

Affixing Asset tags to existing IT assets involves physically walking through the environment, placing tags onto assets, and then associating each asset ID with a specific asset within your new or existing CMDB (Asset Repository). This activity should be performed with a barcode scanner in hand, ensuring that the Asset ID is correctly entered and minimizing errors by enabling the asset technician to create the association on site with the asset at the same time the Tag is affixed. The following represents the standard process for applying Asset ID Tags and entering the information into your CMDB:

1. Affix the Asset Tag containing imprinted and barcoded Asset ID onto the Asset.
2. Identify and/or Search for the Asset in your existing repository using the Asset's Serial Number or other previously used unique identifier(s).
3. Scan the asset ID from the Asset Tag into the asset's asset record.
4. If you are creating a new asset record for the asset, enter additional relevant and/or required information about the asset.

### Tag Incoming Assets

Most organizations have an Asset Receiving process in place to manage incoming assets. During this process, new Asset

records should be created in your CMDB or Asset Repository and tagged with their assigned Asset ID. An example Receiving process, including the application of Asset ID Tags follows:

1. Asset Receiver receives the asset into the environment and validates via associated Purchase Order number or other method.
2. Receiver affixes an appropriate Asset Tag to the asset.
3. Receiver creates an asset record by entering relevant information from the Purchase Order and physical asset. The Asset ID, imprinted and barcoded on the Asset Tag, is then scanned into the asset record, creating the association between the real asset and its asset record.

### Perform Daily Asset Management

Creating Asset IDs and tagging your assets facilitates better management of the IT Staff's daily Asset Management activities, such as performing installs, moves, break-fix activities, and planned upgrades. An Asset Tag, conveniently located and easily scanned, removes the requirement of trying to find and scan a Serial Number, which is usually located in a remote or hidden part of the device, often along with other barcodes so it is difficult to ensure that you scanned the correct value. And, sometimes it is not practical to move the asset in order to scan its serial number. But, with a scan of the easily accessible Asset Tag, the IT technician can review the associated asset record and make any necessary changes with minimal disturbance.

### Benefits to your Organization

Creating Asset IDs and tagging assets with barcoded Asset Tags helps to streamline your Asset tracking processes. Asset IDs allow your mobile asset technicians to spot-check assets in the field, simply by scanning in the asset tag to pull up the associated asset record. Moves and changes to assets are easily captured as they occur by associating activity with unique Asset IDs. The end result is a CMDB or Asset Repository containing better and more complete information about your IT environment.

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