Discover the truth about discovery

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Are you sitting in the right session?

• Discover the truth about discovery
  – Automated discovery was, and indeed still is, seen by many as the holy configuration grail and yet over the past couple of years it has become apparent that it poses as many questions as it answers. Sure, it will tell you what you have, some tools will even tell you where it is and what it talks to, others will tell you how it’s being used and even how the stuff is configured… But the advent of agent-less discovery and context sensitive intelligent discovery sensors have also raised many questions regarding their use and how they should be implemented in conjunction with the configuration management process. Like the chicken and the egg, there is much debate over whether the change closure, CMDB update or the automated discovery reconciliation should come first – although this presentation will not necessarily answer that particular question, hopefully it may answer a few others…
A little about me...
What my publisher says…

• Rob Addy is an ITSM professional with over a decade of hands on experience in the field with both enterprise and medium sized organisations. During this time Rob has been fortunate to work for many of the biggest names in the industry in a variety of roles in the UK and the US. From application development and support, to direct solution implementations, to product management and marketing, to consulting management and technical sales, Rob has gained insight into the ITSM world from a wide variety of angles. This 360 degree view of the market enables Rob to balance real life scenarios, customer requirements, best practice processes and technical solution capabilities and limitations to give a unique pragmatic approach to improving IT services using a combination of current best practice and tried and tested experience.
Disclaimer

• The content of this presentation does not necessarily represent the position of my employer. Nor does it represent any intent upon their part to deliver products and services to meet the objectives and requirements covered. Any product references or comparisons are not intended to show a preference and should in no way be taken as a recommendation or otherwise
What we will be covering…

• Discovery – The truth is out there…
• Bursting a few bubbles
• Truth is always relative
• The current state of the discovery union
• Discovery and Configuration Management
A VERSION OF THE

THE TRUTH IS OUT THERE
Is Automated Discovery really the magic pill that the vendors claim?
Why do we inherently believe what “the machine” tells us?
So, what is truth?
“Not everything that counts can be counted, and not everything that can be counted counts”
The current discovery market

- Device discovery
- Hardware discovery
- Software discovery
- Topology discovery
- Configuration discovery
- System dependency discovery
Device discovery
Do not confuse device discovery with intrusion detection and/or network security management...
Do not confuse hardware discovery with event management…
Software discovery
Do not confuse software discovery with software asset management…
Topology discovery
Do not confuse topology discovery with service impact management...
Configuration discovery
Do not confuse configuration discovery with hardware and/or software discovery…
System Dependency discovery
Do not confuse system dependency discovery with a crystal ball or a magic wand...
The state of the discovery union

Toplogy
- Relationships and dependencies
- Connectivity and communication
- Trusted domains
- Open ports / vulnerabilities

Security
- IP Device discovery
- OS discovery

Advanced Hardware discovery
- Software audit
- Software installation package identification

Software usage metering
- Location tracking
- Configuration discovery
- Configuration

Security
Agent based vs. Agent-less
For each discovered device there will be between 12 and 30 interactions between the discovery server and the target machine.
And the winner is...
Automated discovery and configuration management
Automated Discovery: The process of finding What? & Where?

Process Goals:
• Identify and record all IT assets in the infrastructure
• Proactively track configuration changes
• Determining physical location of IT assets
• Monitor software deployment and usage

Non-intrusive, low network impacting, monitoring and auditing process to identify and record detailed IT asset information. Proactively audits IT assets to track all software installed, and associated usage profiles, to help enable license compliance management.
Automated Discovery

- Define automated discovery requirements
- Identify any infrastructure limitations
- Determine various discovery profiles needed
- Identify scheduled maintenance windows
- Plan discovery schedule(s) to minimise environmental impact
- Determine deployment mechanism(s) and package client agent
- Perform Hardware, Software and Topology, Configuration audits according to schedule
- Initial discovery agent deployment
- Ongoing monitoring of software usage
- Passive network monitoring to identify any unknown devices
- Periodic transmission of audit results to server
- Software fingerprinting and identification process
- Hardware, Software and Configuration reconciliation
- Exception handling process
Common issues related to Discovery

• No longer sufficient to know what you have, you now need to know where it is, what it’s doing, how it’s configured…
• Volume of assets / CI’s and number of platforms to support constantly increasing
• Automatically collected data is not always 100% accurate
• Disconnected clients and machines with poor network access (Secured network segments, DMZs etc)
• Business requirements to track more and more detail
• Excessive network bandwidth usage by discovery agents
• Consolidation of existing discovery infrastructure to build a single view of the world
Discovery and Configuration Mgt

- CMDB / CMS population
- Reconciliation
- Using discovery data
- Chickens and eggs…
Should automated discovery inject data directly into the CMDB / CMS?
Trusted sources and trust
Segmented CMS

• Approved / Authorised view
  – What we believe we have

• Detailed configuration view
  – Enhanced / Extended view of approved view

• Discovered view(s)
  – Temporary data stores prior to reconciliation, data promotion and exception handling

• Aspirational view
  – “Blue sky” vision of where you’d like to be…
Reconciliation

Reconcile: to make, apparently conflicting things, compatible or consistent with each other
“As we know, there are known knowns. There are things we know we know. We also know there are known unknowns. That is to say, we know there are some things we do not know. But there are also unknown unknowns, The ones we don't know we don't know.”

US Secretary of Defense, Donald Rumsfeld - 2002
Exception handling

Exceptions may be handled in a variety of ways:

- Incidents
- Changes
- Inventory amendments
- CMDB / CMS updates
- Purchase requisitions
- Investigations
Reasons to reconcile (Cont’d)

- Enhancement with financial and contractual information from an ERP system
- Comparison of the current situation against a predefined target situation after a planned series of changes / releases, in order to track progress
- Assignment of person related information against hardware data e.g. by reconciling application usage log against a list of machine specific IP addresses.
- Enhancement of discovery data with additional and/or more reliable technical data points from a specialist, or niche, discovery toolset
Using discovered data

- Incident Management
- Problem Management
- Change Management
- Configuration Management
Incident Management

• Provision of useful information to assist with the diagnostic process
  – Urban myth which needs debunking

• Identification of parts to be ordered to replace a failed component
  – Saves a trip to a machine to check the specification of the bit that is broken
Problem Management

• Lots and lots of data (much of it superfluous) to slice, dice and dissect in an attempt to find underlying trends and causes
  – Needles, haystacks etc
• Identification of the culprit / prime suspect / scape goat
Change & Release Management

- Change / Release planning
  - Version base-lining
  - Candidate selection
    - Upgrade plans
    - Migration plans
- Change completion verification
- Release progress measurement
Which comes first? The Change completion? CMDB / CMS update? Or automated discovery reconciliation?
Configuration Management and Automated Discovery

- Collection of raw configuration data
- Configuration data verification
- Tracking of configuration drift away from a defined baseline
- Periodic identification of devices that have gone AWOL
Discovery generates lots of data…

If you get data for “free”, does it have any value?
The difference between data and information...
Don’t confuse a screen full of configuration data for “management”
What we covered… (I hope)

- Discovery – The truth is out there…
- Bursting a few bubbles
- Truth is always relative
- The current state of the discovery union
- Discovery and Configuration Management
- Discovery tools are just tools… And a fool with a tool is still a fool! (Albeit a slightly more dangerous one!)
Takeaways

• Automated discovery is just a tool
• Discovery data is just data
• Having lots of CI data might be nice but will it really help you?
• Data needs to be managed, analysed and used to deliver information and value
• Accurate and pertinent configuration information is needed to help drive most ITSM processes
Thank You!
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