iTop 0.9

User guide

Don’t hesitate to ask question to support@combodo.com

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About iTop

This document describes release 0.9 of iTop. iTop is a robust Open Source web 2.0 application that will help you to better support your IT. Development of iTop started in March 2006 in order to publish on the internet a completely open solution that would help enterprise to drive ITIL best practices implementation. Goal of the iTop community was to provide an alternative solution to very expensive solutions sold by standard software vendors.

At the early beginning of the project, the development team was focus on building the most complete CMDB (Configuration Management Data Base). One key objective was to make it as flexible as possible in order to allow administrator to add and remove configuration items from the data model and manage as many relationships as they want. The development team also designed a powerful state machine that allows defining life cycle for whatever configuration items in the CMDB.

Realizing that all concepts developed within the CMDB can be applied to all other ITIL best practices, the iTop community decided to extend them to Incident Management, Change Management and Service Management modules. Then iTop became an IT operational portal that helps all IT management team to support their environment by:

Documenting IT infrastructures and their relationships (servers, application, network …)
Documenting all users service calls.
Documenting IT incident and planned outages, as well as a known error database.
Documenting all IT services and contracts with external providers.

iTop application can be used by different type of profiles:

Help Desk
IT support engineers (1st level, 2nd level, 3rd level …)
IT service managers
IT managers

iTop application is relying on Apache, MySQL and PHP, so it can run on whatever operating system supporting those applications. It had been tested already on Windows, Linux Debian and Redhat. As it is a web based application you don't need to install client on user PC. A simple web browser is enough to use it.

Licensing

iTop is licensed under the terms of the GNU General Public License Version 3 as published by the

Free Software Foundation. This gives you legal permission to copy, distribute and/or modify iTop under certain conditions. Read the 'license.txt' file in the iTop distribution.
iTop is provided AS IS with NO WARRANTY OF ANY KIND, INCLUDING THE WARRANTY OF DESIGN, MERCHANTABILITY, AND FITNESS FOR A PARTICULAR PURPOSE.

Changes since 0.8

Goal of this release was to make the application more robust and more professional. To achieve these goals we developed new features that are mandatory for such application and we fixed a large number of bugs. Just remember that some of the improvement depends on the new data model provided with release 0.9. So if you keep former one, you may have some bugs not fixed. We also underline the fact that the new data model is not compatible with the one you currently have. So we recommend you to check "Migration" chapter in *Administrator guide* to use the best practice to migrate.

New features

Notifications:
This version introduces the capability to generate fully customizable eMail notifications.
This is achieved via two new type of objects: triggers and actions. Triggers define when a particular notification must be sent. Actions define the recipients of the notification as well as the content of the eMail message.
Have a look at the "Notifications" menu item (admins only) for how to configure the notifications.
Note that the notifications shipped by default with the application have been set to 'disabled' so that no
email get sent out in case you load the sample data that contains several tickets.
To enable them go to the "Admin" menu "Notifications", then in the tab "Actions" open the action
that you want to enable and modify its status to "production".

Documents:
The "document" object now contains a field to upload binary documents. The application automatically keeps track of the history of the document (i.e. each version is recorded in the database).
Such documents are stored as "blobs" in the database.
Some type of documents can be displayed online directly (images, HTML, PDF...) some others
can only be opened in a new window, or saved to the user's disk.

SOAP Web service:
This release introduces a formal SOAP web service to create an incident ticket.
The WSDL describing this web service is located at:
http://<your_server_and_port/webservices/itop.wsdl.php
Right now the web service has been tested using a PHP client and the Eclipse/Java web services tester.
We are planning to add more capabilities to the web service in the next releases.
Check the PHP client example available with this release in:
/webservices/itop.soap.examples.php

Truncated lists:
When the result of a query returns a long (limit is configurable) list of objects,
the display is truncated to speed up the whole display, with a link to open the full list.

Bug fixed

All our bugs are track on sourceforge: http://sourceforge.net/apps/trac/itop/report/1. This current release is fixing 11 critical bugs:

#15 major enhancement Manage documents
#17 major enhancement User right management UI
#28 major defect Import CSV failing
#29 major defect Search in object details page
#31 major defect Wrong HTML display in export CGI
#38 major defect Content of Tabs not displayed on Reload
#42 major defect Issue with IE6 and IE7
#48 major defect Change tracking for user object class wrong
#52 major defect issue when displaying details for lnkInfraError object
#53 major defect Global search always displays organizations
#58 major defect issue with HTML format in export.php
#59 major defect Modification of an object with an external key fails
#60 major defect Modification of Service Calls does not work on IE
#65 major defect Incorrect handling of localized characters (like accented characters é à, etc.)
#67 major defect Misleading message when Flash is not installed
#43 minor defect Enter/Cancel keypress closes the dialog
#44 minor defect Mandatory field without option - various symptoms
#49 minor defect Grant matrix not reflecting changes in the user profile
#62 minor defect Could not create new object Person in a bulk load
#47 minor enhancement Split is deprecated.

Current limitation

Release 0.9 is not supporting:

- Creation of new user profile.
- Delete All functionality for a list of object.
- Cloning an existing device. This feature has been disabled for the moment
- as it was not working properly.
- Update All for n/n relationships.
- A lifecycle is not defined for all CI. Only for incident tickets and change tickets.
- Localized characters (like accented letters) are not supported for the moment in eMail notifications

iTop common usage

Starting iTop

To use iTop, you just need a simple web browser and enter the following URL:

http://yourserver or http://yourserver/<itop alias> if you have created a particular apache alias for the application.

User is prompt to enter his login and password.

Figure 6

Depending on its profile, the user has more or right to use the application, but this topic will be discussed later in "User Management" chapter.
Once authenticated, the user accesses the main iTop page.

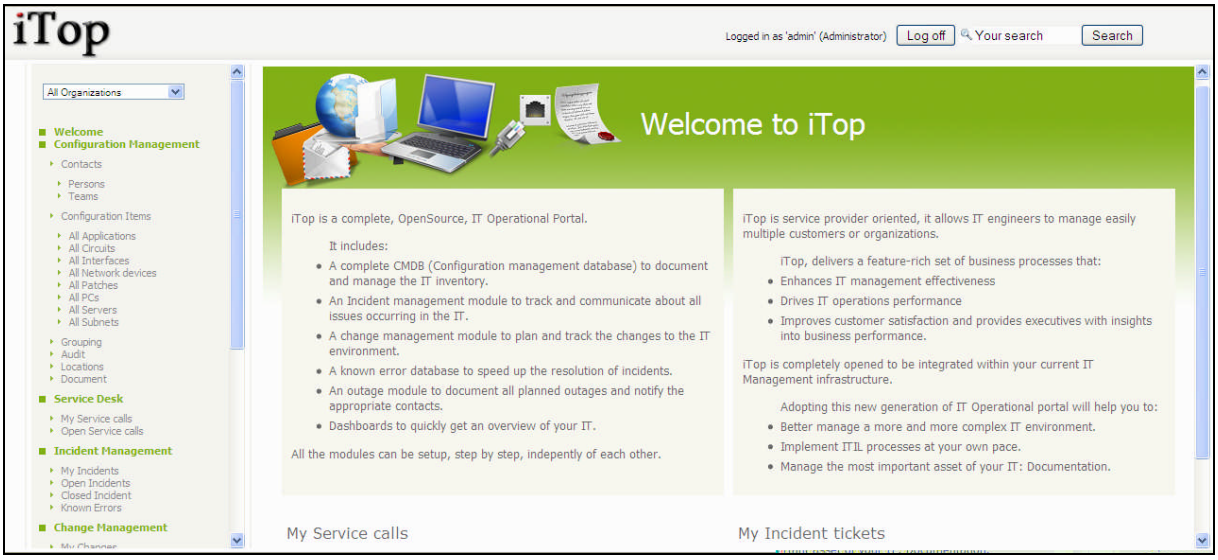


Figure 7

This main page is divided in three parts:

- Left menu (also called explorer menu) to access item from each module (CMDB, Incidents, Changes, Services and contracts)
- Main frame on the right displays list of items from selected module, or details for a given item.
- Top frame to use global search function, and display login information

Using Explorer menu

Filtering on a given organization

This explorer allows you to navigate across all iTop modules. The “drop down” list at the top defines the organization you would like to work with. An organization is a way to group all iTop items into silos. When you have selected a given organization, you will see only items belonging to this one if you are allowed to see them.

Figure 8

Accessing dashboards

The green menu items define each module of iTop application:

- CMDB
- Incident Management
- Change Management
- Service Management

All sub menus are related to one of the corresponding module.
When you click on green menu items, you access a dashboard corresponding to this module. Those dashboards provide an overview of the health of your IT using either pie , bar charts or tables. It is displayed in the Main Frame.

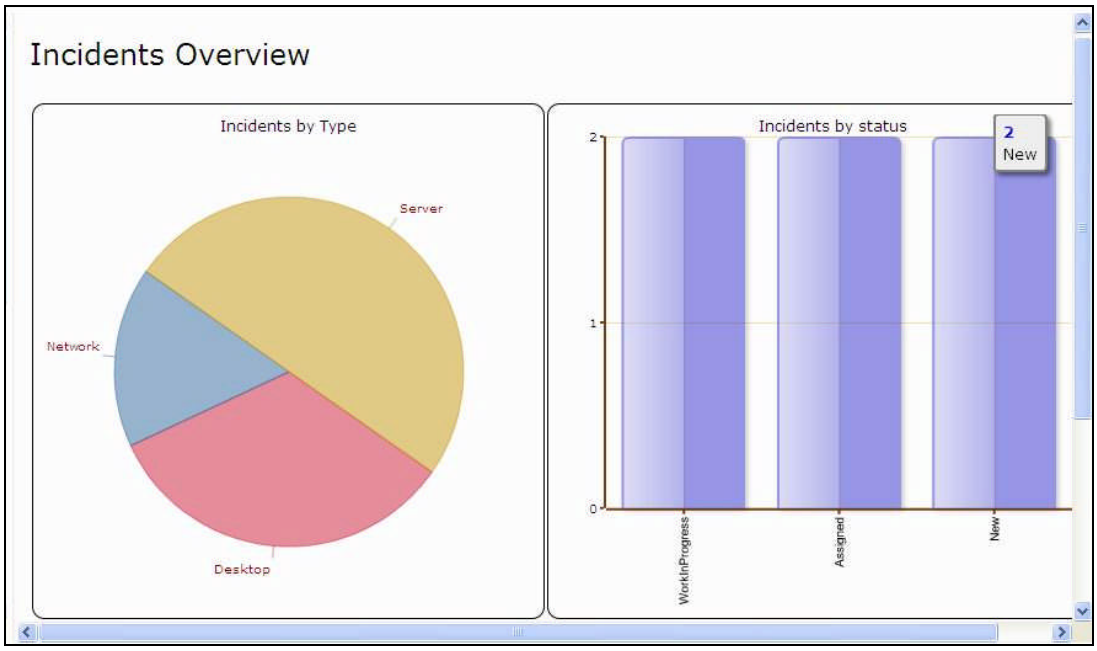


Figure 9

Accessing list of items

When you click on grey menu item within a given module, you get in Main Frame a list of items corresponding to a predefine query in iTop data model. For instance when clicking on “All server” you get a list of server belonging to selected organization.

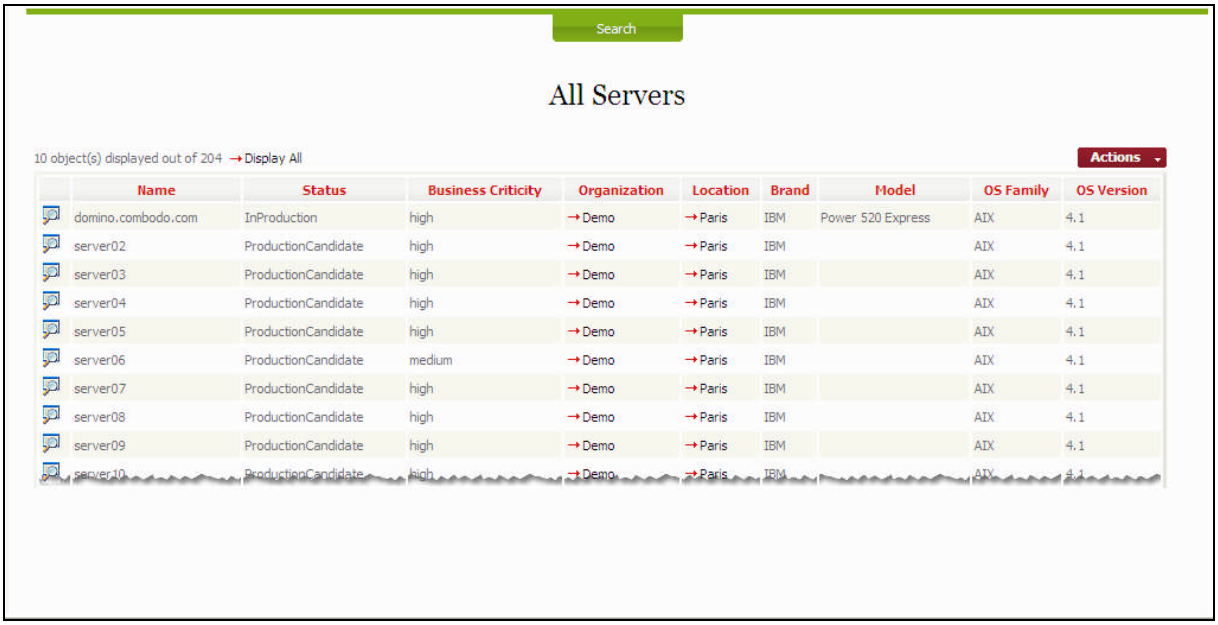


Figure 10

If there are more that X objects for the selected category, a short list is displayed. Once you click on link “Display all” on top of this table, you get the full list. The interest of such

functionality is to reduce latency related to browser display when you have to deal with huge list.
X is define in configuration file “config-itop.php” (see chapter Configuring short list in administrator guide)

We will describe later description of the sub menus for each module.

Navigating within iTop

You can navigate easily from one object to another by simply clicking on fields led by →.
As the application is completely web based, you can right click on you mouse to open this web link into a new window or tab depending on your web browser.
This functionality is really useful in iTop as it allows you to follow relationships between objects

Action on list of items

The Actions button on the top right corner of a list of items allows you to use predefine actions applicable for this list.

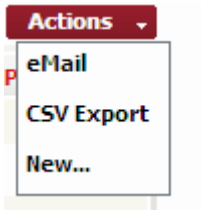


Figure 11

“eMail” allows you to send a mail including a direct web link to the iTop you are currently viewing. This feature is really useful for sharing information with others.

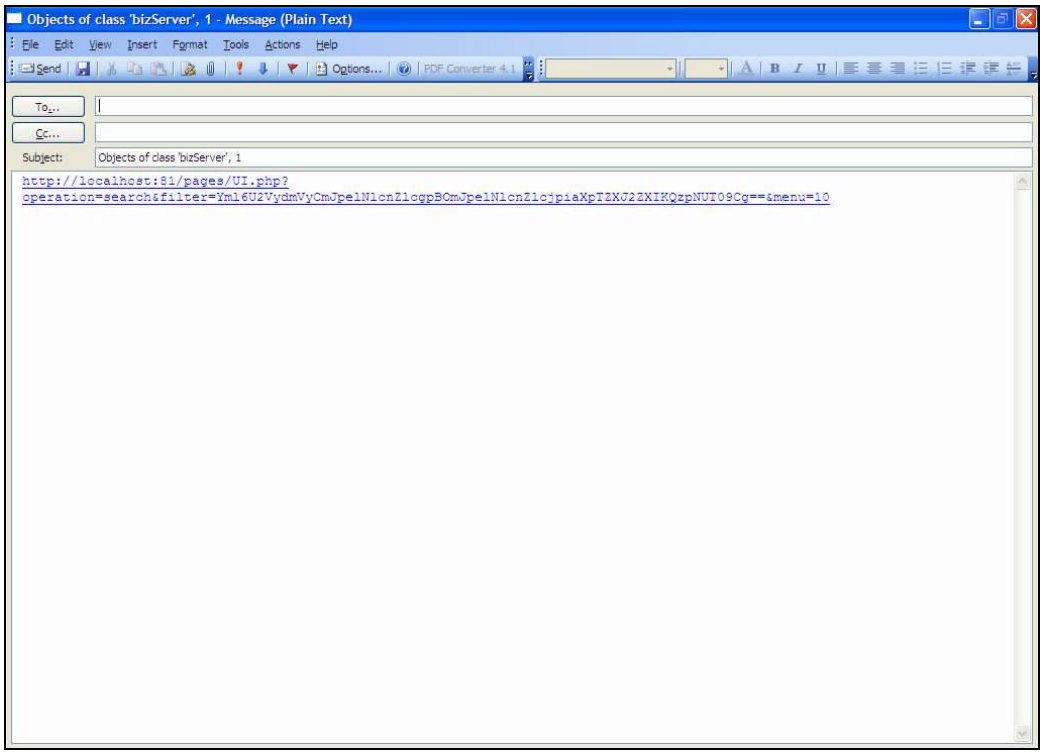


Figure 12

"CSV export" allows you to export list of items you are currently viewing into a csv file in order to use it in Excel for instance.

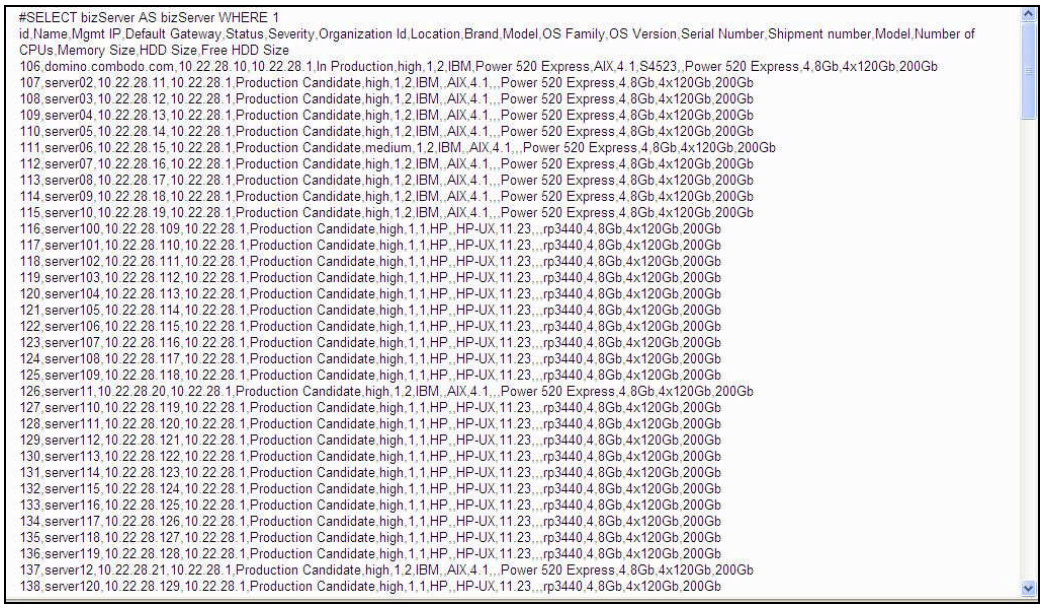


Figure 13

"Bookmark" allow you to save as a new sub menu in the Bookmark module the list you are currently viewing. This feature is useful to share with other users a list of items corresponding to a given search criteria.

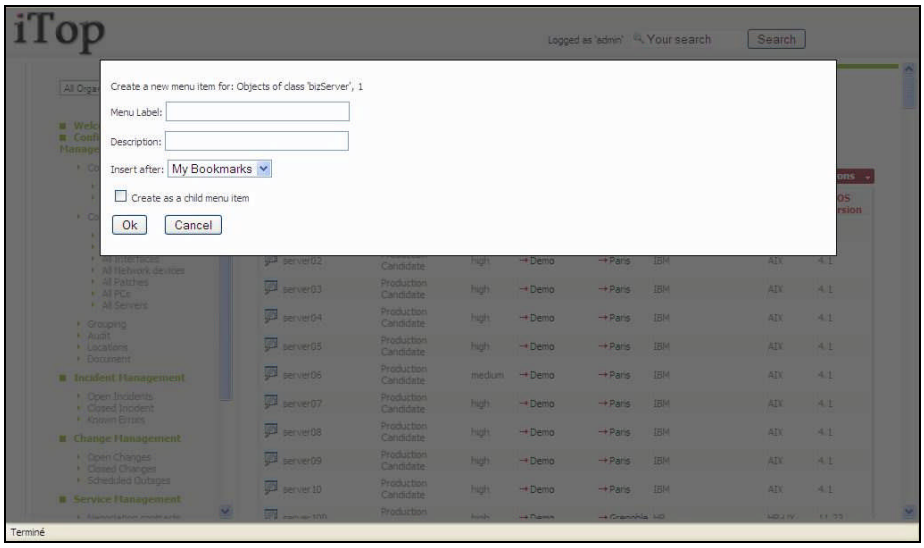


Figure 14

You can define the menu label, as well as a description to document your bookmark.

"New" allow you to create a new item corresponding to the type of object you are viewing, for instance a new server or a new incident ticket. When clicking on this action you get a wizard that helps you to create your item. New item creation will be discuss later for each module.

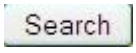
"Modify all" allow you to modify attributes for the list of item you are currently viewing. This feature is useful when you want to update quickly some attributes with the same value for a given list of items. For instance update the Brand of a list of servers with "Dell".

"Delete all" allow you to delete massively all items you are currently viewing. Be careful in the release 0.72 you are not prompted with a confirmation window.

Other actions may be available, but they depend on type of object you are viewing, and their life cycle. We will describe them later for each module if required.

Searching a type of object

When you click on

button it displays the search criteria bar that allows you to refine list of item you are looking for.
You can define by your self the criteria you are interested in, using either drop down lists, or regular expression for blank fields. Then click on 

button to display a new list of item corresponding to your request.

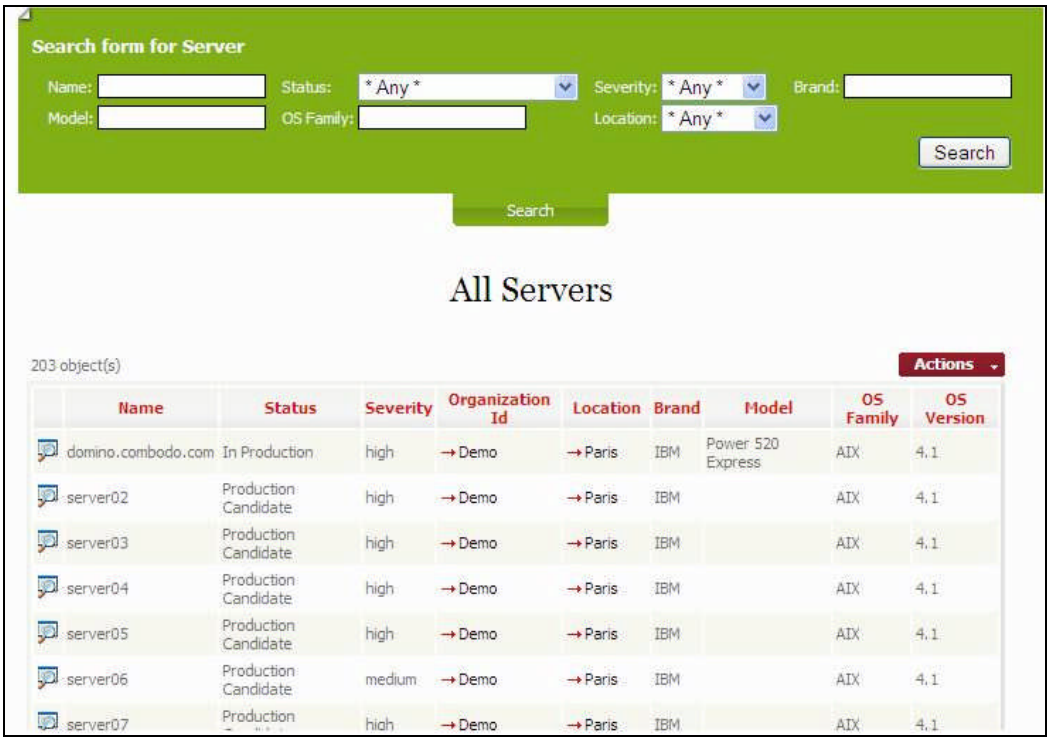


Figure 15

"And" operator is used when you define multiple criteria. This search bar is available for any type of object, but of course search criteria depend on object attributes. The search request is applicable to only one type of object at once.

When you click again on Search, the search bar is hidden.

Accessing object details

From a list of items, you can click on to open the details page of a given item.

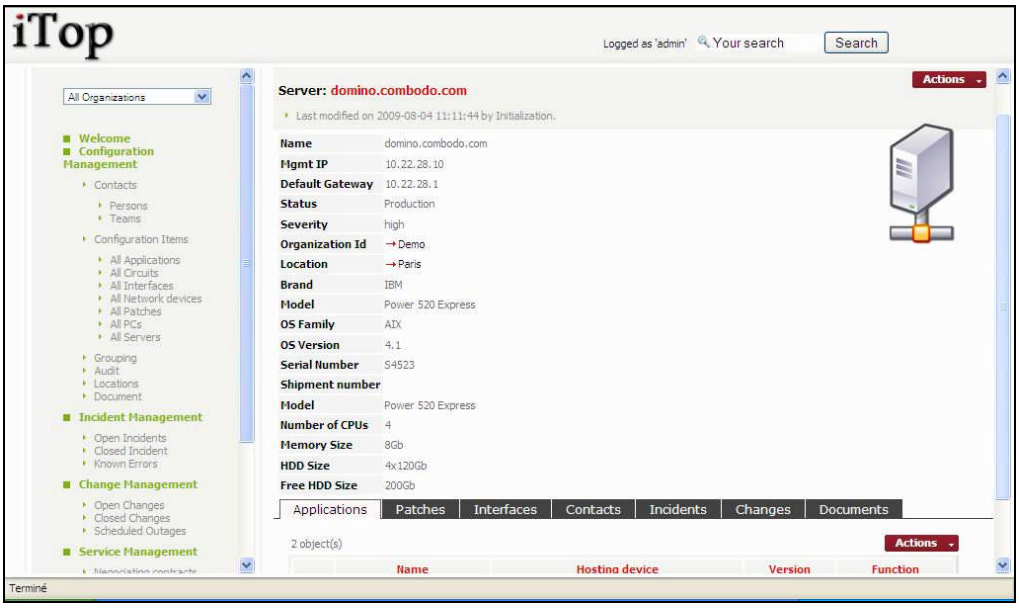


Figure 16

This page displays, in the Main Frame, the attributes for a given item. As for item list, you can click on → to open details page for a related object.
The top banner displays type and name of the selected item, as well as last modification information. When you click on Last modified a drop down list displays all changes that occurred on the corresponding item.

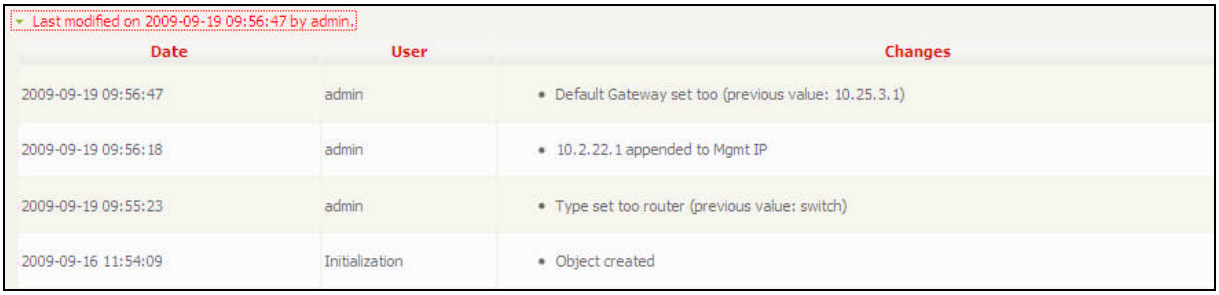


Figure 17

This feature is very important to track when modification where done and by who. When you click again on Last modified, list is hidden.

At the bottom, the tabs display the relationships between the selected item and other objects. For instance applications or patches installed on a server, incidents or changes occurring on a server. The tabs will be described in detail later for each module.

Action on a given item

The Actions button on the top right corner allows you to use predefine actions applicable for the item.

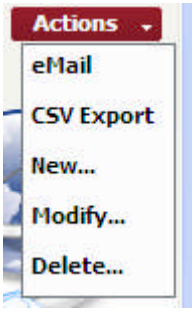


Figure 18

“eMail”, “CSV Export”, “Bookmark”, “New”, and “Delete” are similar to action described for a list of item sooner in this document.

“Modify” allow you to modify attributes for the item you are currently viewing. A wizard opens, and lets you modify the attributes and relationships with other items. The wizard will be described later for each module.

“Clone” allow you to create a new item using attributes filled for another one. This feature is really useful when you want to create an item from another one that has similar attributes. The

wizard for item creation opens with attributes already filled, and lets you modify them. A new item is created when you close the wizard.

Other actions may be available, but they depend on type of object you are viewing, and their life cycle. We will describe them later for each module if required.

Managing relationships between objects

The tabs in “object detail page” are displaying relationships with other objects stored in the data base. iTop allows you to manage either (1,n) or (n,n) relationships. An example of (1,n) relationship is an network interface plugged on a server. An example of (n,n) relationship is a link between several servers and several contacts.
When you click on tabs in “object detail page”, the UI displays list of objects linked to the current one. The

button on the top right corner of the list allows you to manage the relation.

(n,n) relationship management
For such type of relation, you can add, manage or remove all links between objects.

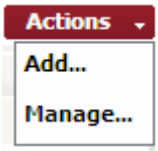


Figure 19

Add action opens following wizard to manage new relations to add with current object
You can search objects to link using the wizard, and select those you would like to link. You can also update attributes for the relationship, for instance impact for an incident.

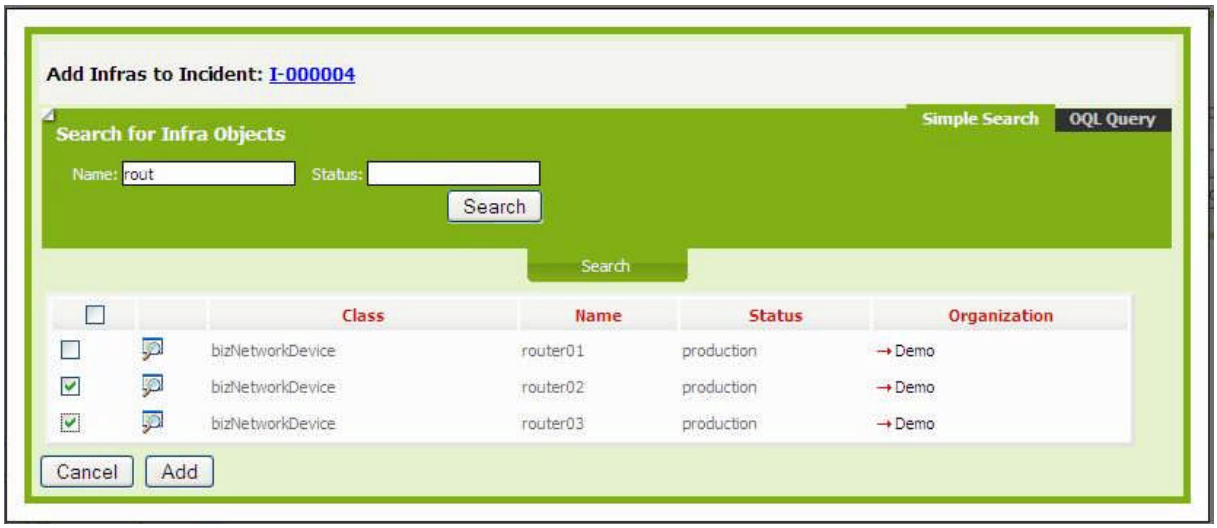


Figure 20

Manage action allows you to modify attribute for already existing relationships, or add and remove some.

Figure 22

Remove all action suppresses all relationships created for a selected object.

Those wizards don't allow you to create new applications, or contracts. They are used only to build relationships.

Global search

This feature is really fundamental in iTop. Like in "Google", it allows you to search words or regular expression in the full data model, whatever type of object you are interested in.

Types for instance "Paris" in Your search and type on Search. You get all objects related to this word:

Contacts on this site
Servers, PC, and network devices installed on this site.
Incident occurring on items located on this site …

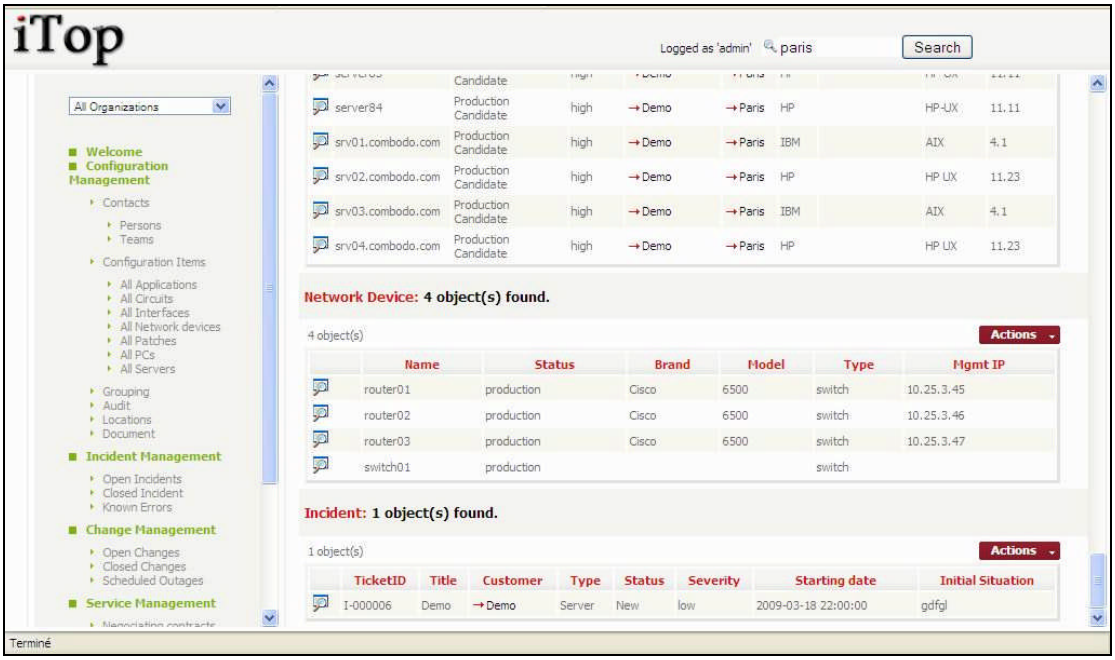


Figure 19

You can also use regular expression like “%sw%” for instance.
Using global search helps you to get quickly information on your IT, without knowing really where to look for. Like in “Google”, it is really powerful and straightforward.

Using direct URL

As iTop is completely web based you can access directly whatever page using its URL either by copying it from web browser or by using action “eMail”. This feature allows you to:

- bookmark you favorite pages
- share pages with other people
- build HTML dashboards
- integrate iTop within a third party application

When accessing directly an iTop URL, you are prompted to enter your login and password if you are not already authenticated.

Using CMDB module

This module is related to Configuration Management Data Base as described in ITIL best practices.

It allows IT operators to describe all items they have under their control. It provides a logical model of the IT infrastructure by identifying, controlling, maintaining and verifying the version of all existing Configuration Items (CIs).
Relationships between CIs are also documented in this CMDB, thus IT engineers can easily analyse dependencies within the infrastructure and impact due to outages.

Release 0.72 of iTop handles:

- Contacts, Team and Workgroups for Incident and Change tickets
- Locations
- Infrastructure (Desktop, Servers, Network devices, Circuits, Interfaces, Applications, Patches)
- Groups of CI
- Documents. Web URL only in this release

All CIs are describes in iTop data model and can be modified. Thus this document describes only data model that has not been customized.
All modifications made on a CI are tracked with modification date, modified attribute values (old and new one), and user who made the change.

Managing Contacts

When you click on “Contacts” in the Explorer bar, you get a dashboard summarizing information about contacts:

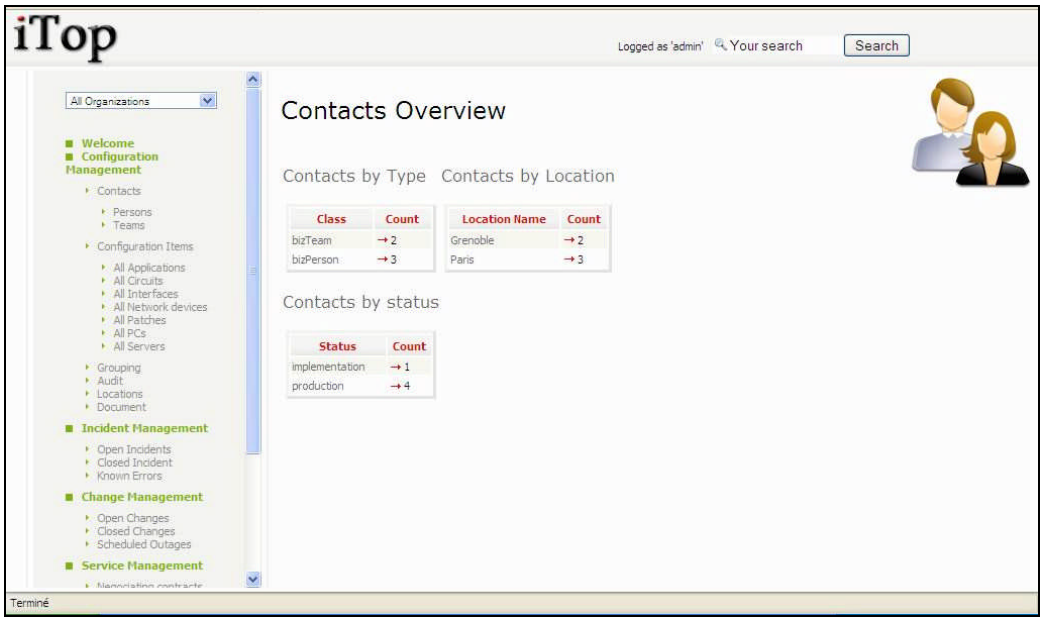


Figure 20

All pages related to Contacts contains picture in top right corner. It allows operator to know where he is when navigating across iTop.

Managing person

A person is anybody that needs to be documented in the CMDB.
"Persons" menu display all people belonging to selected organization.

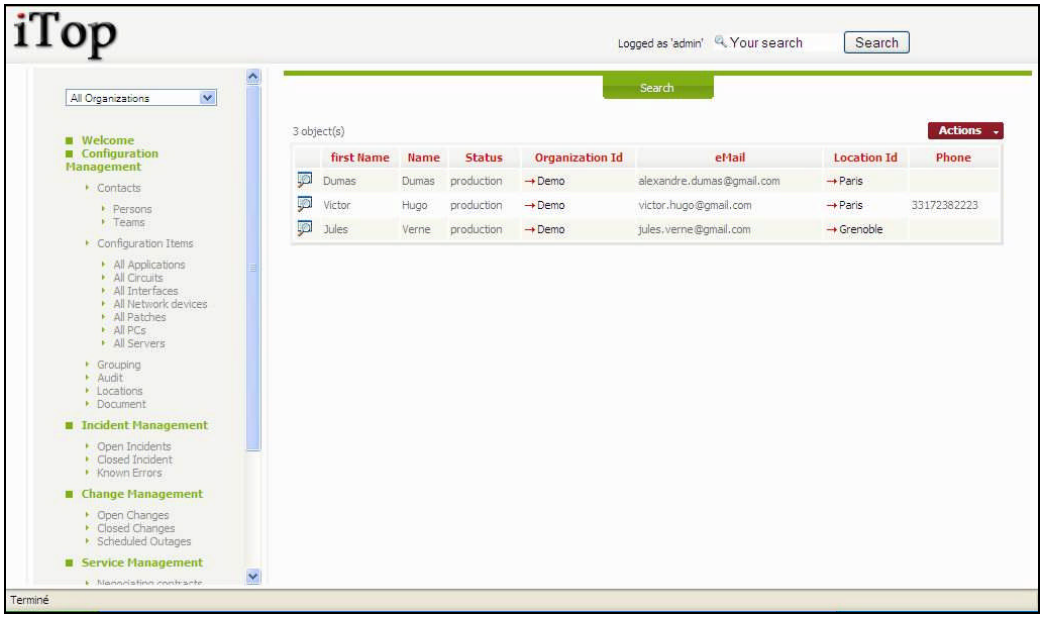


Figure 21

When you click on button you get details for selected person.

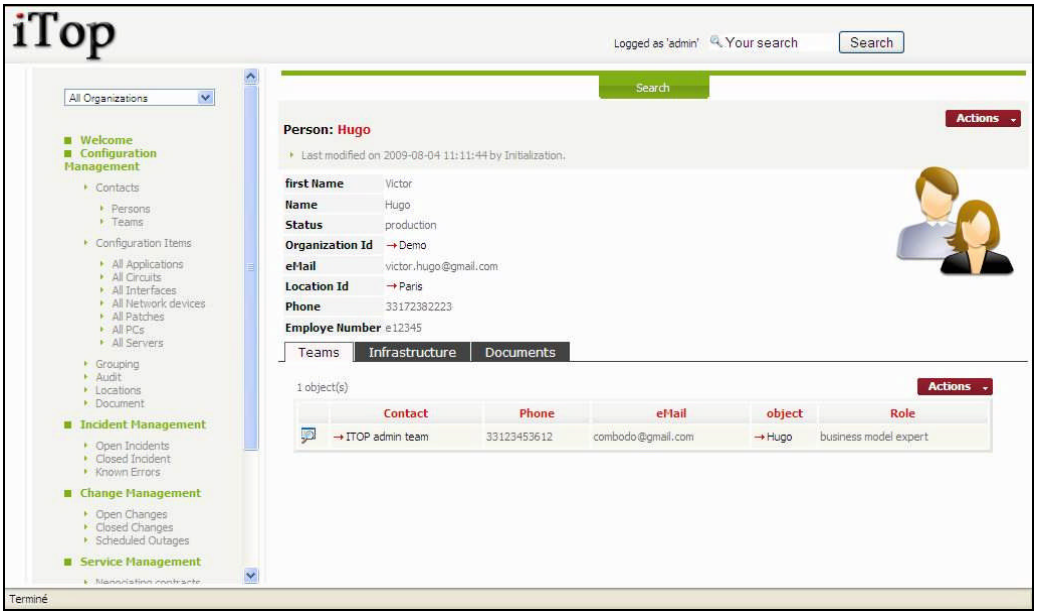


Figure 22

A person belongs to only one location and one organization.
“Teams” tab displays all team this person belongs to, with her role. You can easily manage those relationships as describe in chapter “Managing relationships”

“Infrastructure” tab displays all infrastructures owned by this person. You can easily manage those relationships as describe in chapter “Managing relationships”

“Documents” displays all documents linked to this person. You can easily manage those relationships as describe in chapter “Managing relationships”

There is no specific action related to a person. Only standard one describe sooner are available.

To create a new person you just have to click on “New” in action drop down list, from either person list or a given person detail. Following wizard then appears:

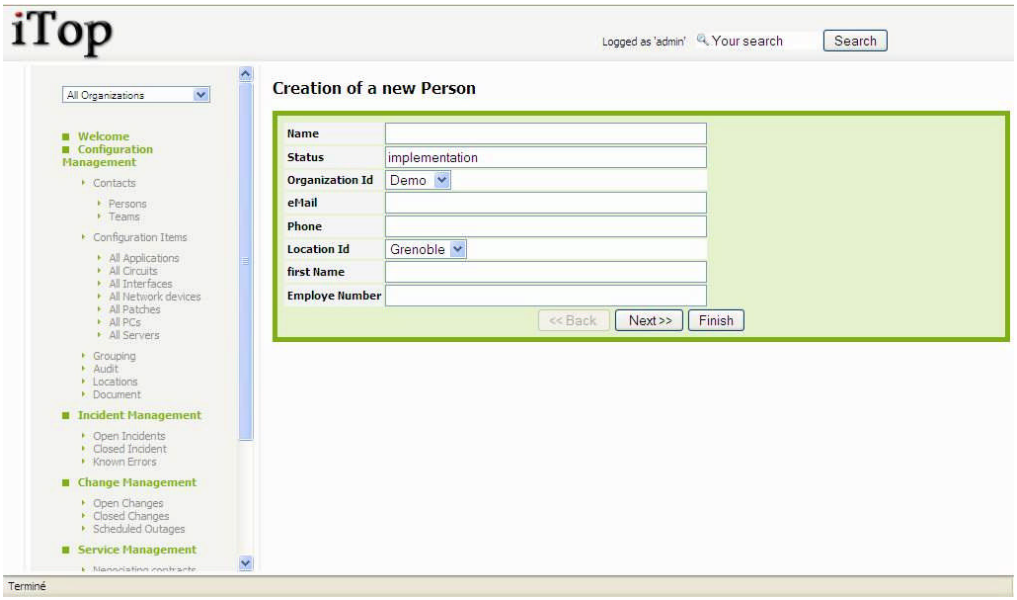


Figure 23

Fill in all fields with needed information and click on Next >>. A confirmation window appears, asking you to create the new person.

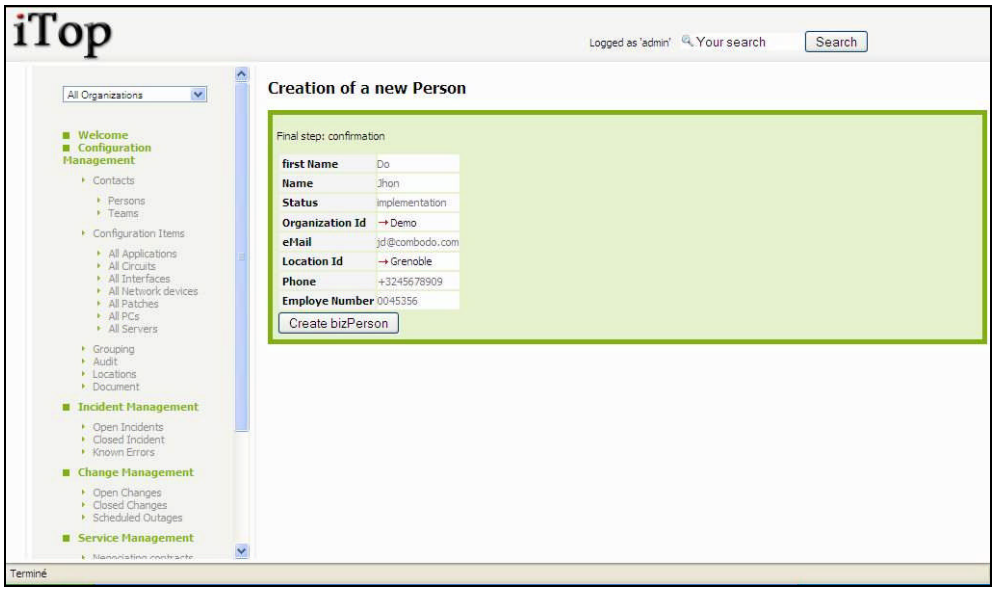


Figure 24

The details page of this new person is automatically displayed.

You can also use “Clone” action if fields to be entered are similar to an already existing person as described in “iTop Common usage” chapter.

To modify a person’s attributes, click on “Modify” in Action drop down menu. Following wizard appears to modify attributes:

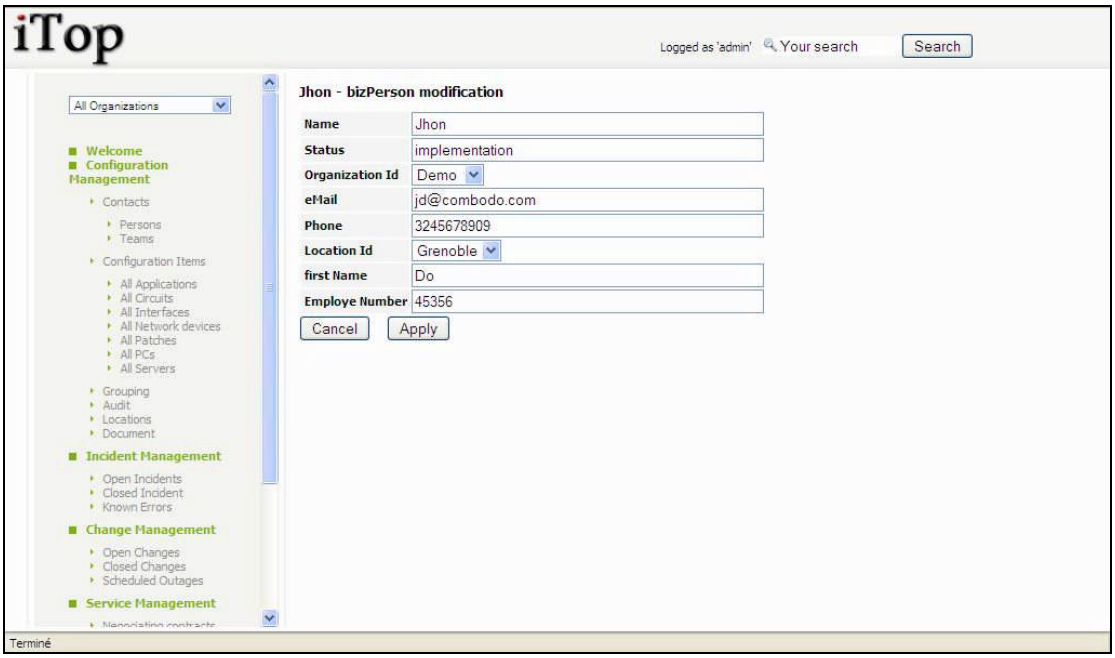


Figure 25

Managing team

A team is a group of person that needs to be documented in the CMDB.
“Teams” menu display all teams belonging to selected organization.

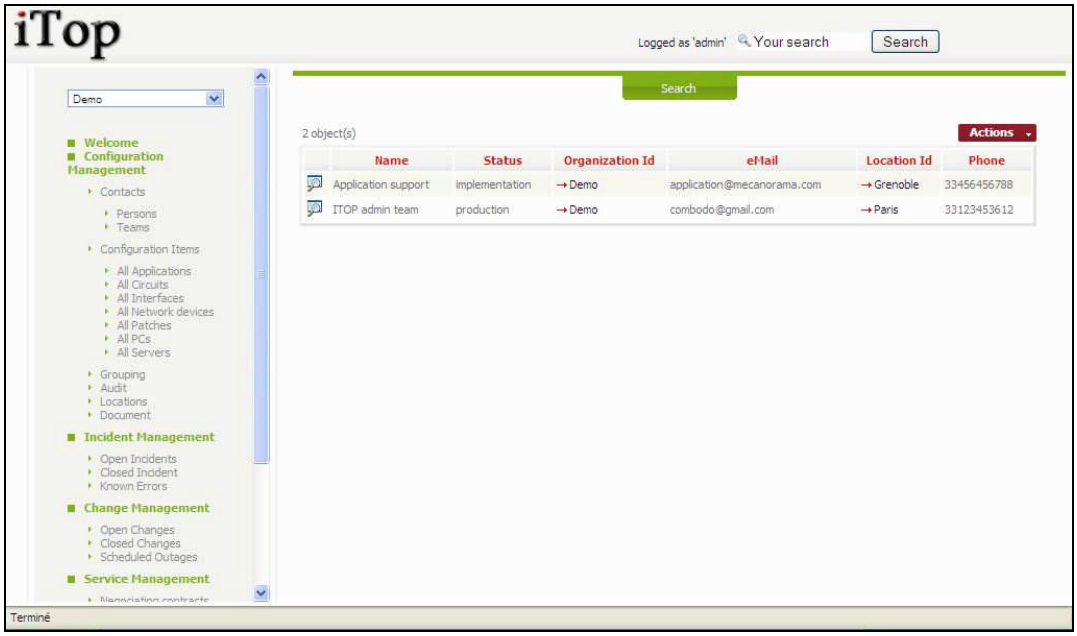


Figure 26

When you click on button you get details for selected team.

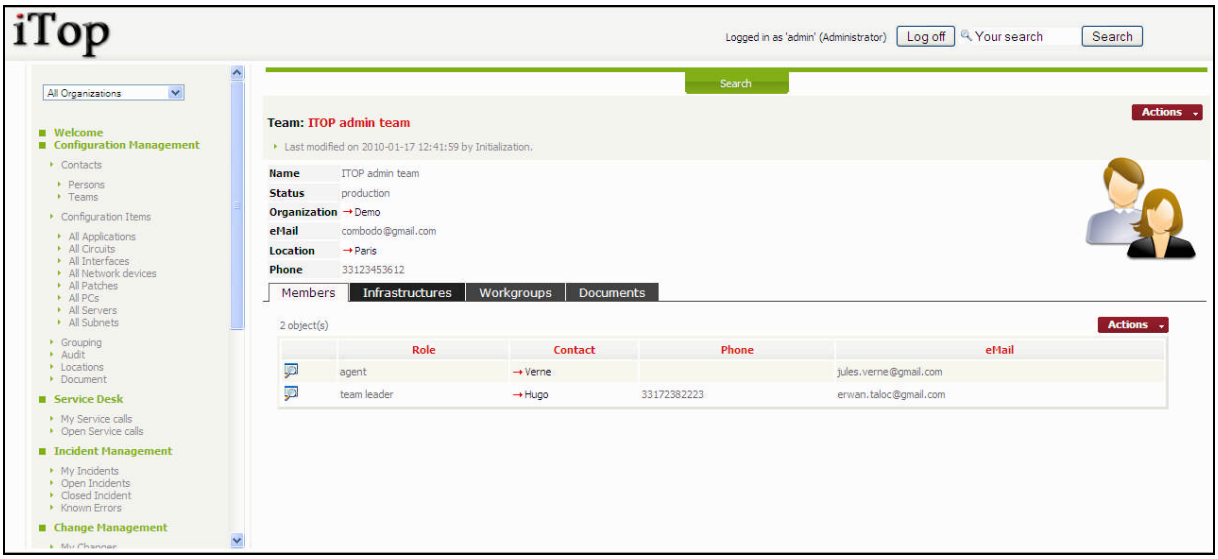


Figure 27

A person belongs to only one location and one organization.

“Members” tab displays all persons belonging to this team. You can easily manage those relationships as describe in chapter “Managing relationships”

“Infrastructure” tab displays all infrastructures linked to this team. You can easily manage those relationships as describe in chapter “Managing relationships”

“Workgroups” tab displays all workgroup related to this team. Those workgroups are used to assign ticket to this team. You can create several workgroup for a given team, for example if this one has several role (1st level, 2nd level …).

“Documents” displays all documents linked to this team. You can easily manage those relationships as describe in chapter “Managing relationships”

There is no specific action related to a person. Only standard one describe sooner are available.

Managing Workgroups

Workgroups are used to assign ticket (Service call, Incident, change) to a team. A workgroup can belong to only one team and is mandatory if you want to assign a ticket to a team.

To create a new workgroup for a given team, you just have to go to the “Workgroups” tab of the selected team and click on “Click here to create a new Workgroup” or click on Actions “New” if other workgroups are already created.
The following wizard appears:

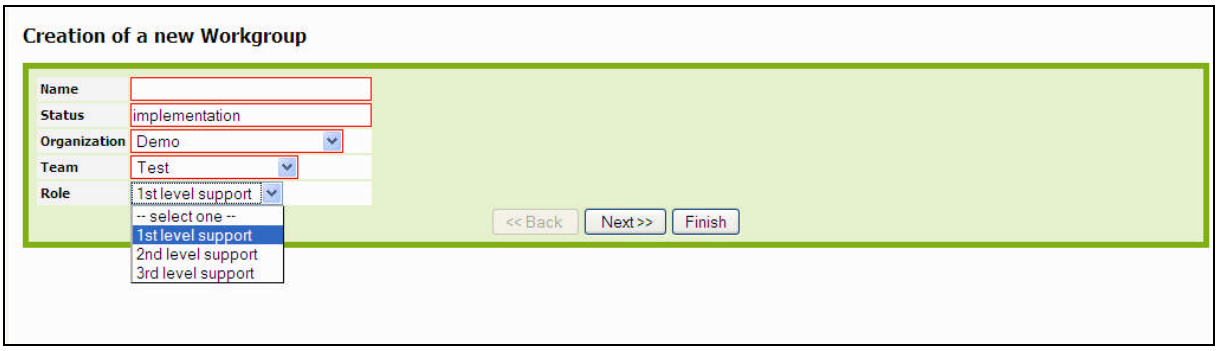


Figure 28

You just have to specify a meaningful name for this workgroup and a role.

It is important to make sure that members are assigned to the team; else you won't be able to assign ticket to an agent.

Managing Locations

A location is a configuration item that allows you to document in the CMDB any geographical location (Site, Building …).
"Location" menu displays all locations belonging to selected organization.

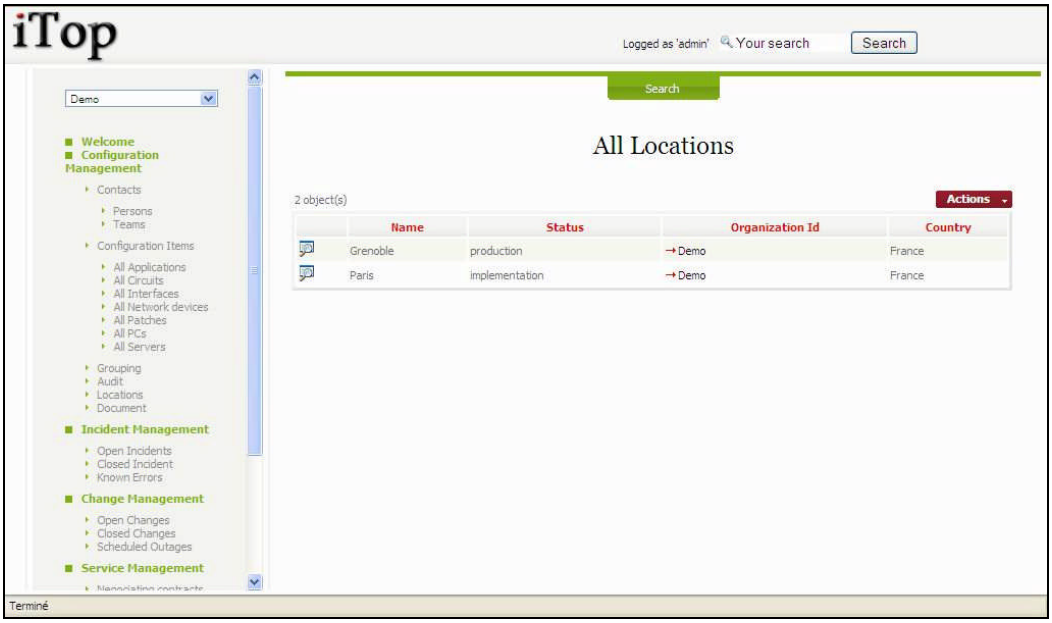


Figure 29

When you click on button you get details for selected location.

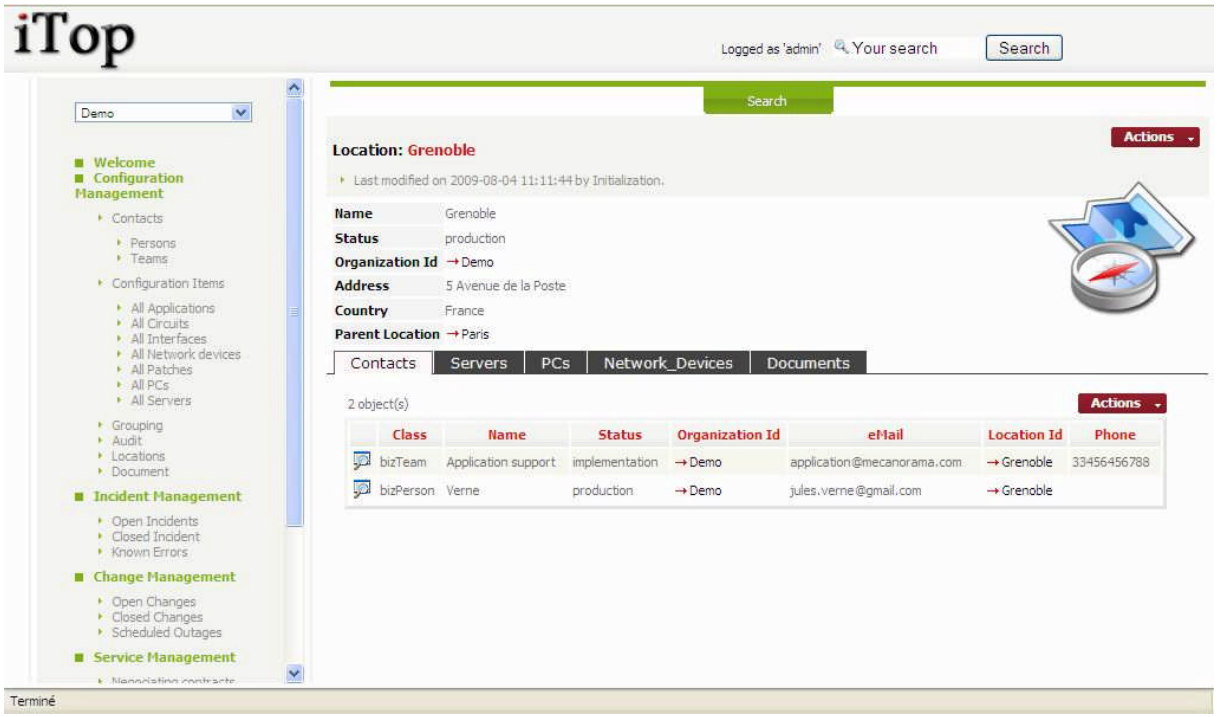


Figure 30

“Parent Location” field allows you to cascade location in order to model hierarchy. For instance a site is a parent location for a building.

“Contacts” tab displays all contacts (persons and teams) located on this location.
“Servers” tab displays all servers located on this location.
“PCs” tab displays all pcs located on this location.
“Network Devices” tab displays all network devices located on this location.
“Documents” tab displays all documents related to this location (network diagram, maps …)

To create a new location you just have to click on “New” in action drop down list, from either location list or a given location detail. Following wizard then appears:

.

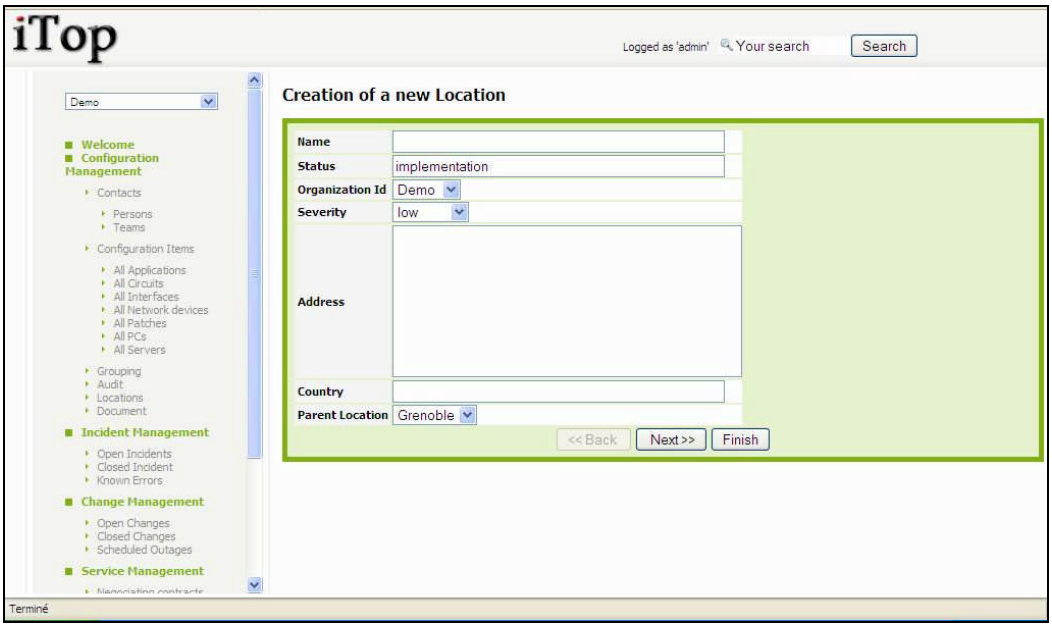


Figure 31

As for creation of other configuration item, you just have to fill required fields, and click on Next >> to get confirmation window and create new location. Once created, details page for this new location automatically appears.

There is no specific action related to a location. Only standard ones described sooner are available

Managing Infrastructures

An infrastructure represents all hardware or software items installed in your IT. iTop CMDB allows you to manage their life cycle as well as relationships between items. Thus you can document applications installed on server, client/server relationships between two applications, on which port of switch a server is connected too …

Managing PCs

This type of configuration item is whatever laptop or desktop installed in you IT.
"All PCs" menu displays all PCs documented for the selected organization.

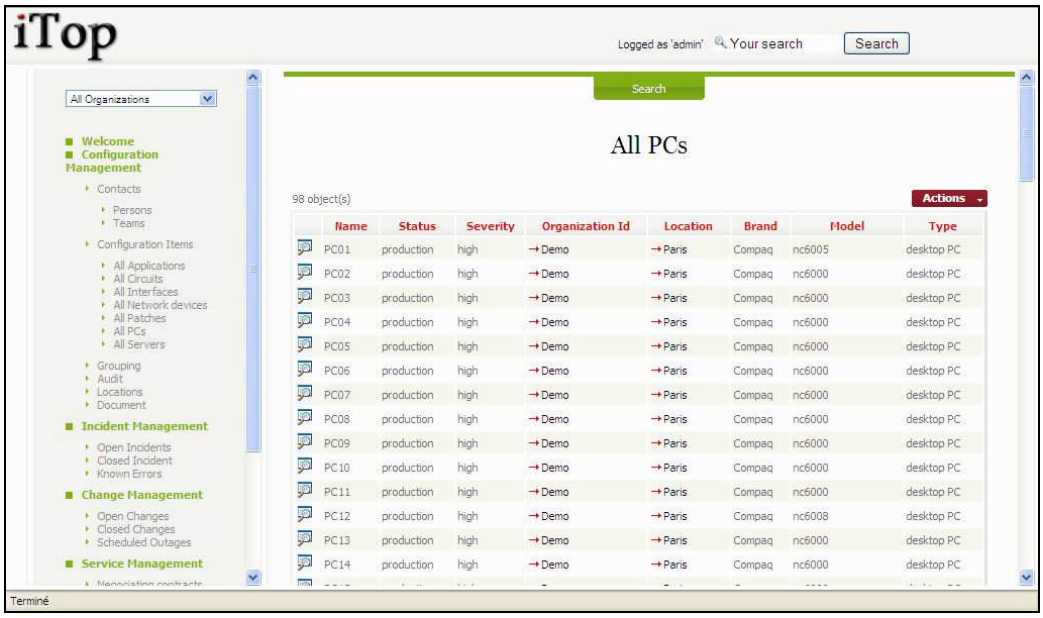


Figure 32

When you click on button you get details for selected PC.

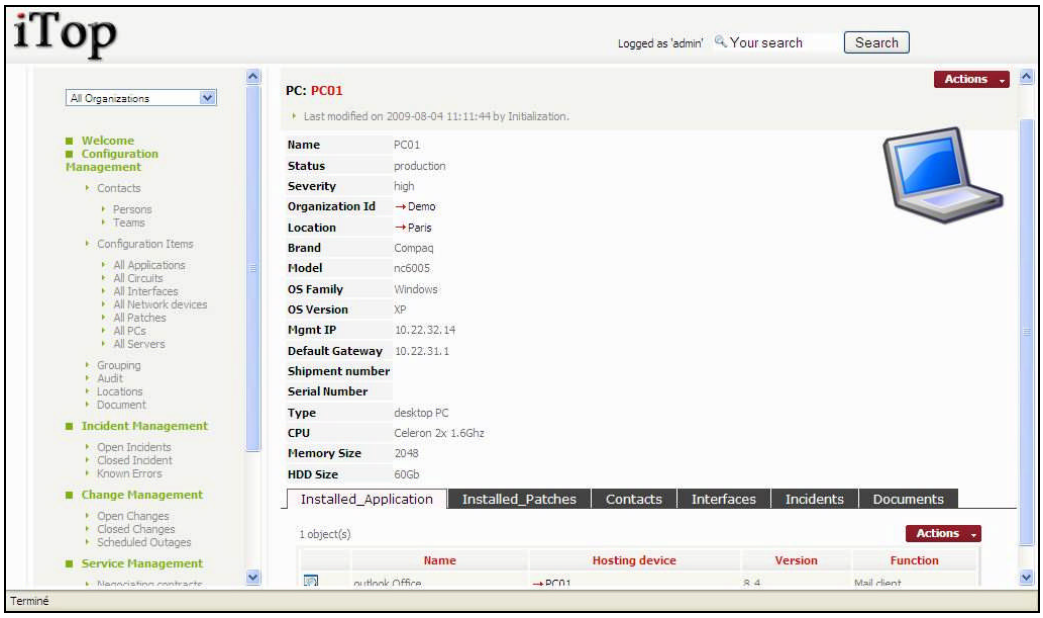


Figure 33

A PC belongs to only one location and one organization.
“Installed Application” tab displays a list of application installed on this PC.

“Installed Patches” tab displays a list of patches installed on this PC.

“Contacts” tab displays all the contacts documented for this PC. You can easily manage those relationships as describe in chapter “Managing relationships”

“Interfaces” tab displays all network adaptors documented for this PC.

“Incidents” tab displays all open incidents related to this PC.

“Documents” tab displays all documents related to this PC. You can easily manage those relationships as describe in chapter “Managing relationships”

To create a new PC you just have to click on “New” in action drop down list, from either PC list or a given PC detail. Following wizard then appears:

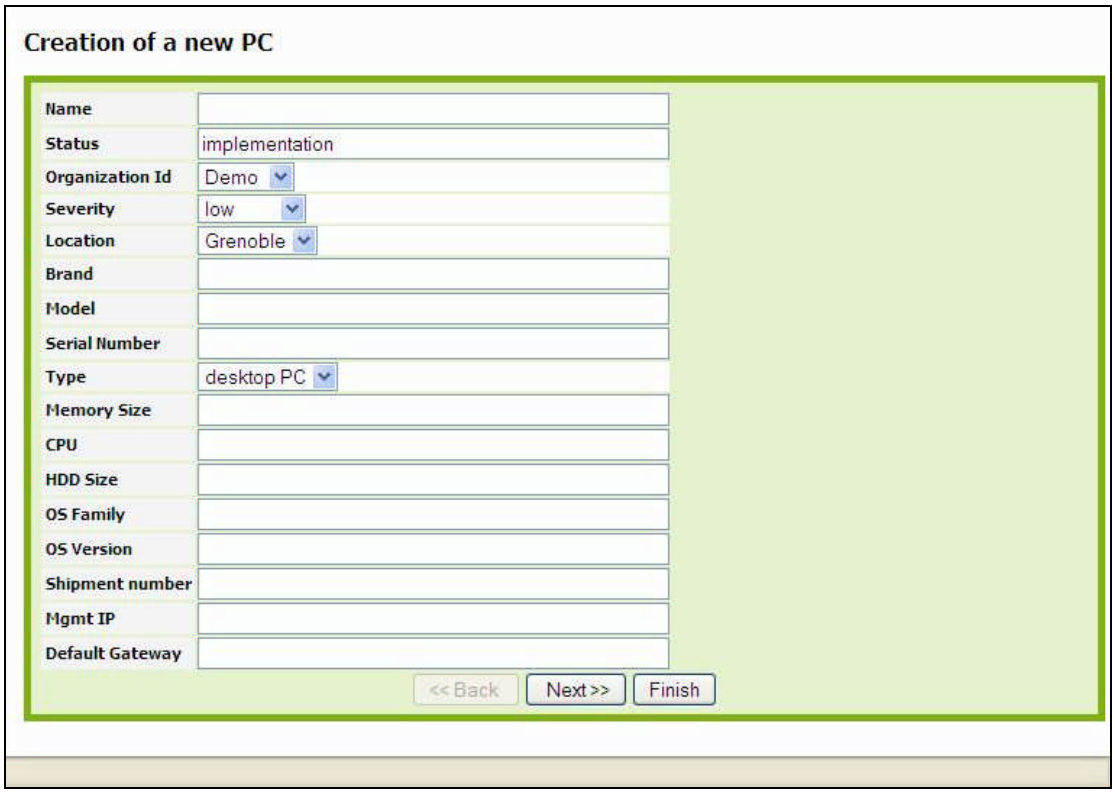


Figure 34

As for creation of other configuration item, you just have to fill required fields, and click on Next >> to get confirmation window and create new PC. Once created, details page for this new PC automatically appears.

There is no specific action related to a PC. Only standard ones described sooner are available

There are two options to create a new application installed on this PC:

> Either by clicking on “Click here to create a new Application” if there is no application currently displayed in “Installed Applications” tab.
> Or by clicking on Actions -> “New”, if there are already several applications displayed in “Installed Applications” tab.

In both cases, wizard for creating an application appears. This one is described later in “Managing Applications” chapter.

There are two options to create a new patch installed on this PC:

Either by clicking on "Click here to create a new Patch" if there is no patch currently displayed in "Installed Patches" tab.
Or by clicking on

-> "New", if there are already several patches displayed in "Installed Patches" tab.

In both cases, wizard for creating a patch appears. This one is described later in "Managing Patches" chapter.

There are two options to create a new Interface installed on this PC:

Either by clicking on "Click here to create a new Interface" if there is no interface currently displayed in "Interfaces" tab.
Or by clicking on

-> "New", if there are already several interfaces displayed in "Interfaces" tab.

In both cases, wizard for creating an interface appears. This one is described later in "Managing Interfaces" chapter.

There are two options to create a new Incident for this PC:

Either by clicking on "Click here to create a new Incident" if there is no incident currently displayed in "Incidents" tab.
Or by clicking on

-> "New", if there are already several incidents displayed in "Incidents" tab.

In both cases, wizard for creating an incident appears. This one is described later in "Using Incident management module" chapter.

There is no specific action related to a PC. Only standard ones described sooner are available.

Managing Servers

"All Servers" menu displays all servers documented for the selected organization.

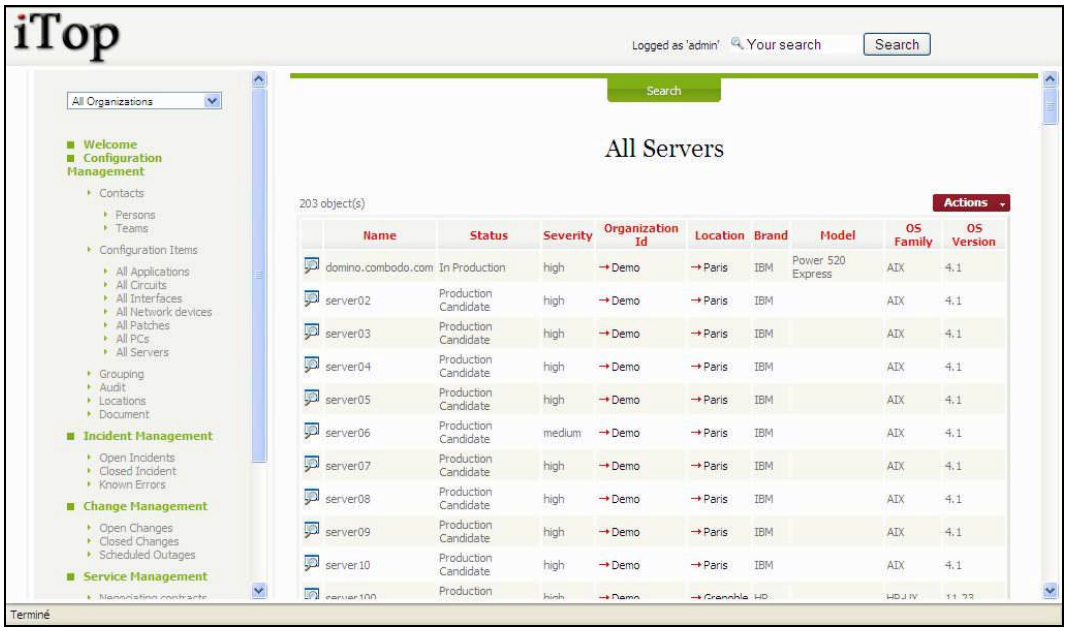


Figure 35

When you click on button you get details for selected server.

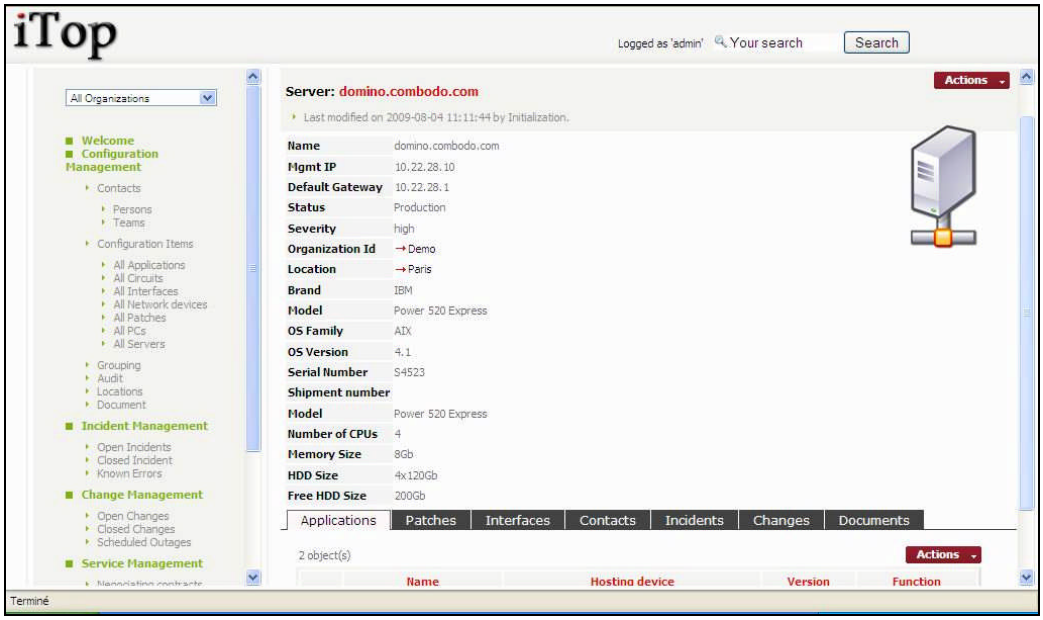


Figure 36

As for a PC, a server belongs to one location and one organization.
“Application” tab displays a list of application installed on this server.

“Patches” tab displays a list of patches installed on this server.

“Interfaces” tab displays all network adaptors documented for this server.

“Contacts” tab displays all the contacts documented for this server. You can easily manage those relationships as describe in chapter “Managing relationships”

“Incidents” tab displays all open incidents related to this server.

“Changes” tab displays all open changes related to this server.

“Documents” tab displays all documents related to this server. You can easily manage those relationships as describe in chapter “Managing relationships”

The way to create applications, patches, interfaces, contacts, incidents and documents are the same as the one documented in chapter “Managing PCs”.

There are two options to create a new Change for this server:

Either by clicking on “Click here to create a new Change” if there is no change currently displayed in “Incidents” tab.
Or by clicking on Actions -> “New”, if there are already several changes displayed in “Changes” tab.

In both cases, wizard for creating a change appears. This one is described later in “Using change management module” chapter.

Managing Applications

An application is whatever software installed on either a PC or a server.
“All Applications” menu displays all installed application documented for the selected organization.

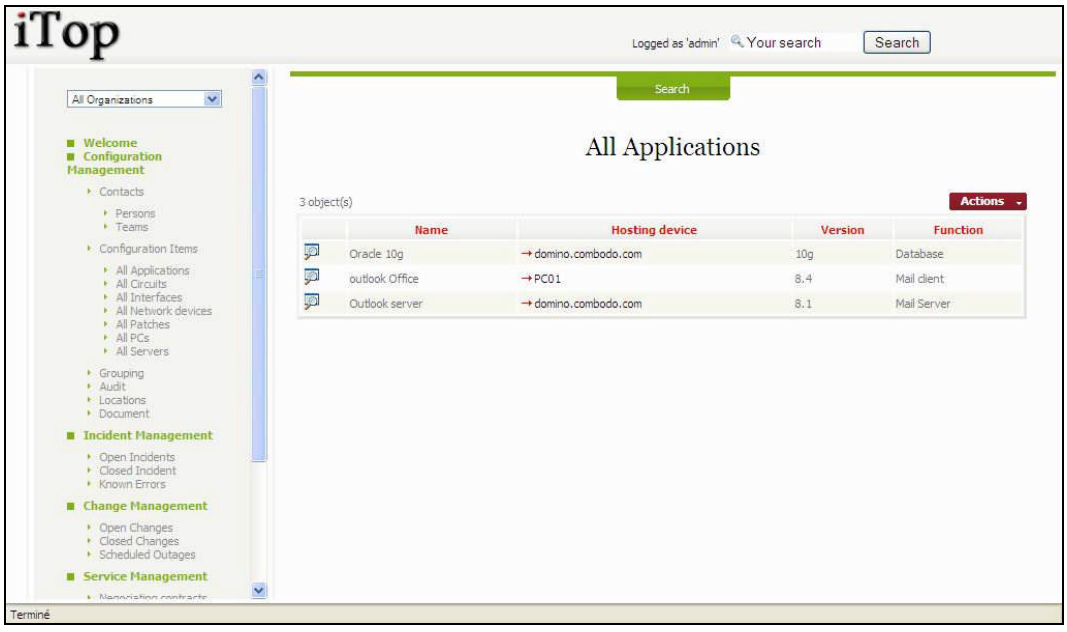


Figure 37

When you click on button you get details for selected applications.

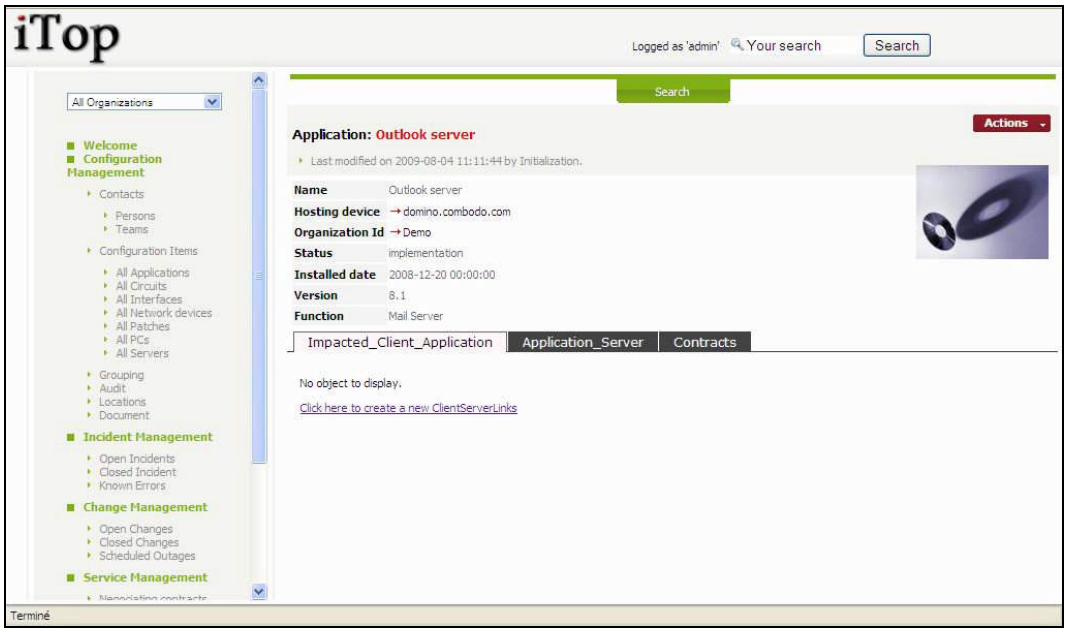


Figure 38

One application CI is related to only one Hosting device. Thus you have a new application for each server or PC it is installed on.

“Impacted Client Application” tab displays all client application that depends on the one you are viewing. You can easily manage those relationships as describe in chapter “Managing relationships”

“Application Server” tab displays all server applications for the one you are viewing. You can easily manage those relationships as describe in chapter “Managing relationships”

“Contracts” tab displays all contracts that cover the application you are viewing (support, license contract …). You can easily manage those relationships as describe in chapter “Managing relationships”

Managing Patches

“All Patches” menu displays all patches installed on server or PC for the selected organization.

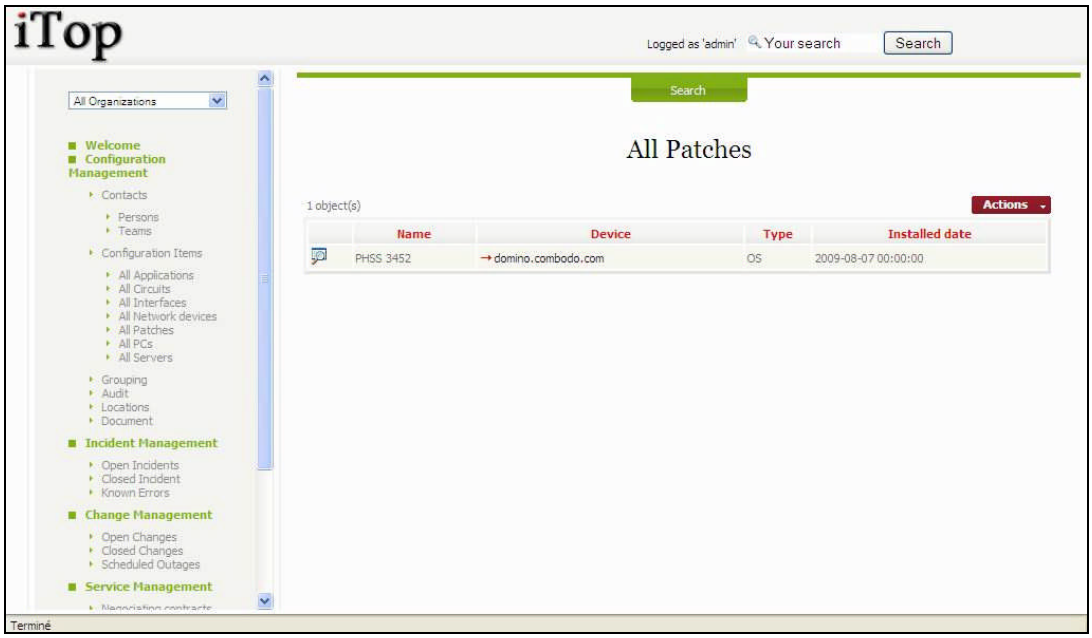


Figure 39

When you click on button you get details for selected patch.

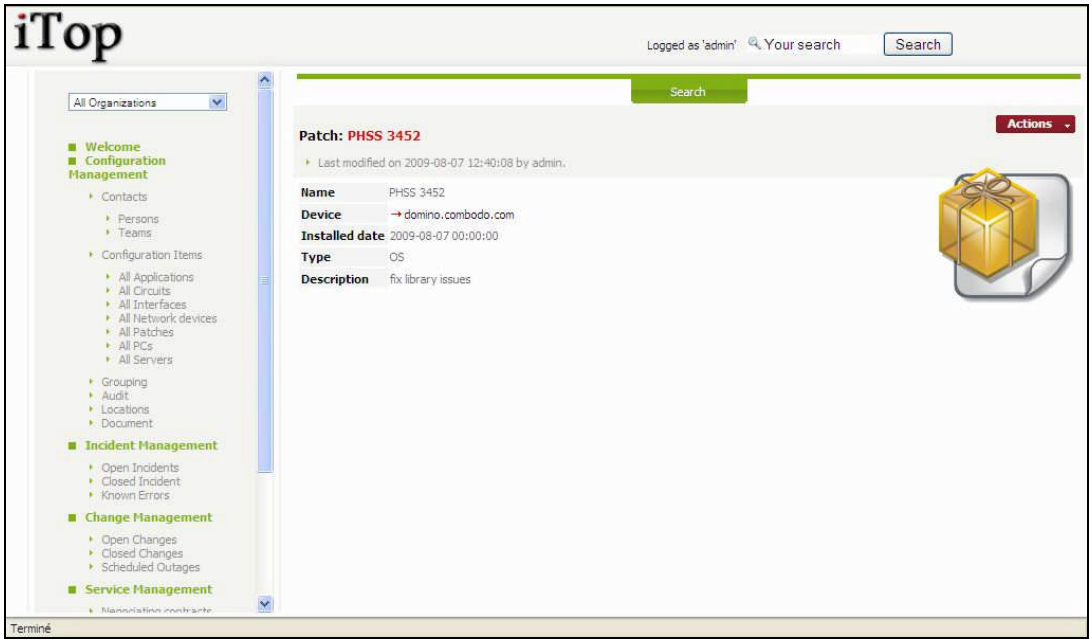


Figure 40

To create a new patch you just have to click on “New” in action drop down list, from either patches list or a given patch detail. Following wizard then appears:

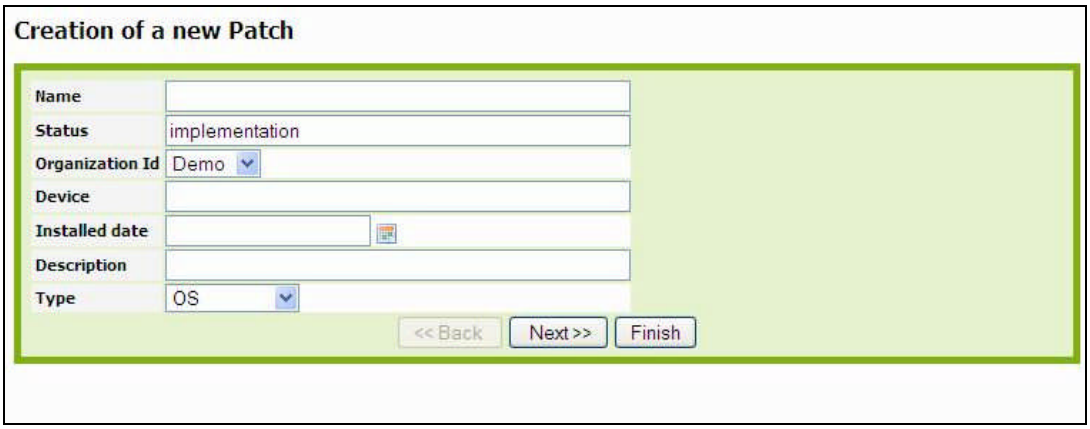


Figure 41

When you click on Next >> you get confirmation window and create new patch. Details for this patch are displayed automatically.
If the same patch is installed on several servers or PC you will have to create it for each one.

Managing Network Devices

The Network device class regroups all routers, switches, firewall, etc, installed in your environment. “All Network device “menu display a list of such objects documented in iTop.

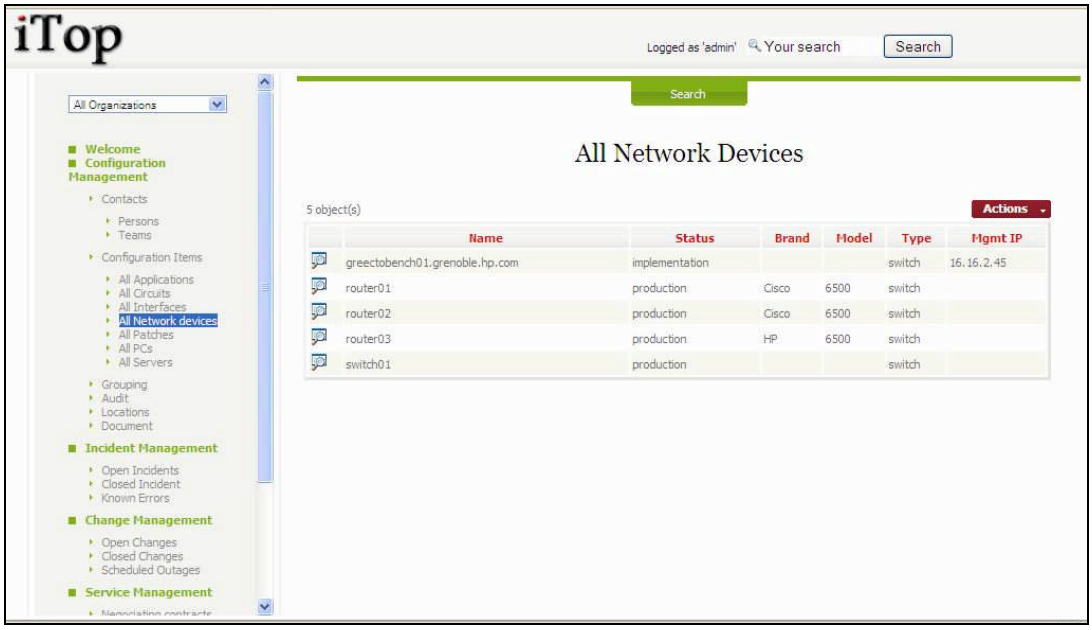


Figure 42

When you click on button you get details for selected network device

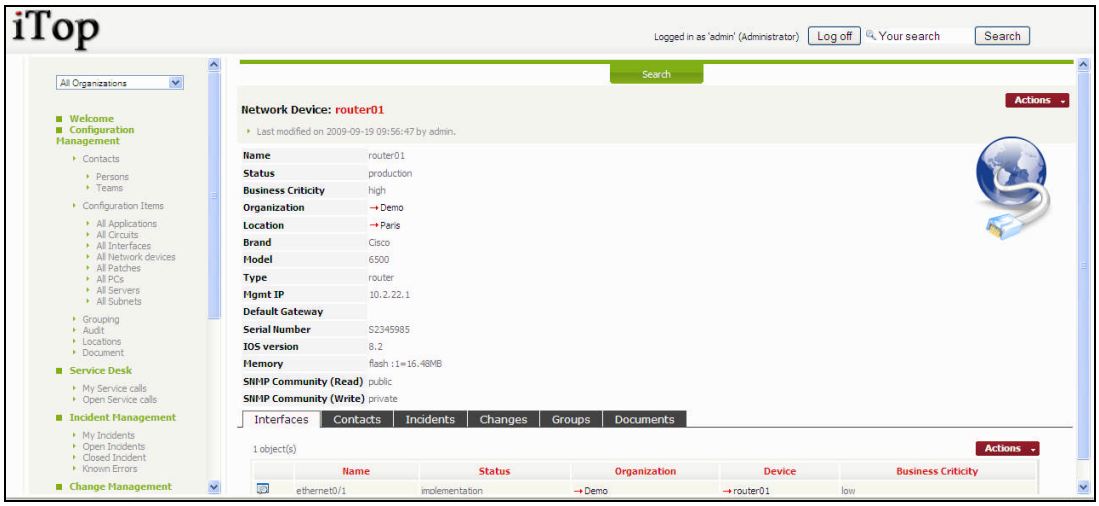


Figure 43

"Interfaces" tab displays a list of network interfaces documented for the selected object. You can add a new one by clicking on button

on top right corner of this list. (see Managing Interfaces for more details about Interfaces).

"Contacts" tab displays all contacts related to this object. For example team responsible for providing hardware support for this devices. You can easily manage those relationships as describe in chapter "Managing relationships"

"Incidents" tab displays all incidents having an impact on the network device. You can easily link the network device to a new incident, but this is managed most of the time in the Incident management module.

"Changes" tab displays all changes having an impact on the network device. You can easily link the network device to a new change, but this is managed most of the time in the Change management module.

"Documents" tab displays all the documents that are linked to this device, for example description of the hardware. You can easily manage those relationships as describe in chapter "Managing relationships"

To create a new network device you just have to click on "New" in action drop down list, from either network device list or a given network device detail. Following wizard then appears:

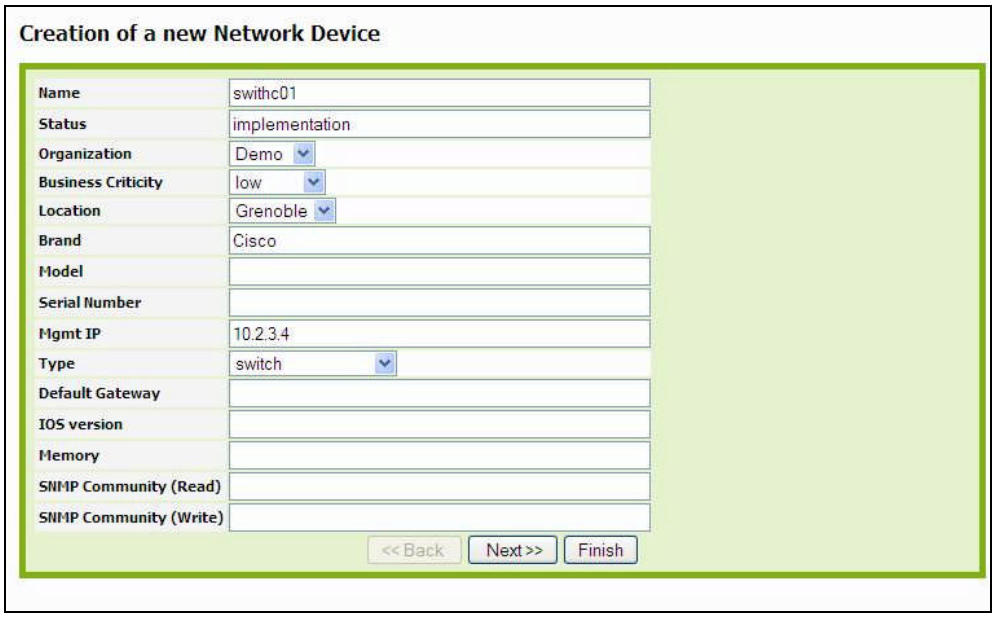


Figure 44

Fill in all fields with needed information and click on Next >>. A confirmation window appears, asking you to create the new network device. Then click on create NetworkDevice.

Managing Interfaces

An interface is representing any card that allows connecting devices to the network. It can be linked to network devices, PCs or servers.
"All Interfaces" menu displays all those CI for a given organization.

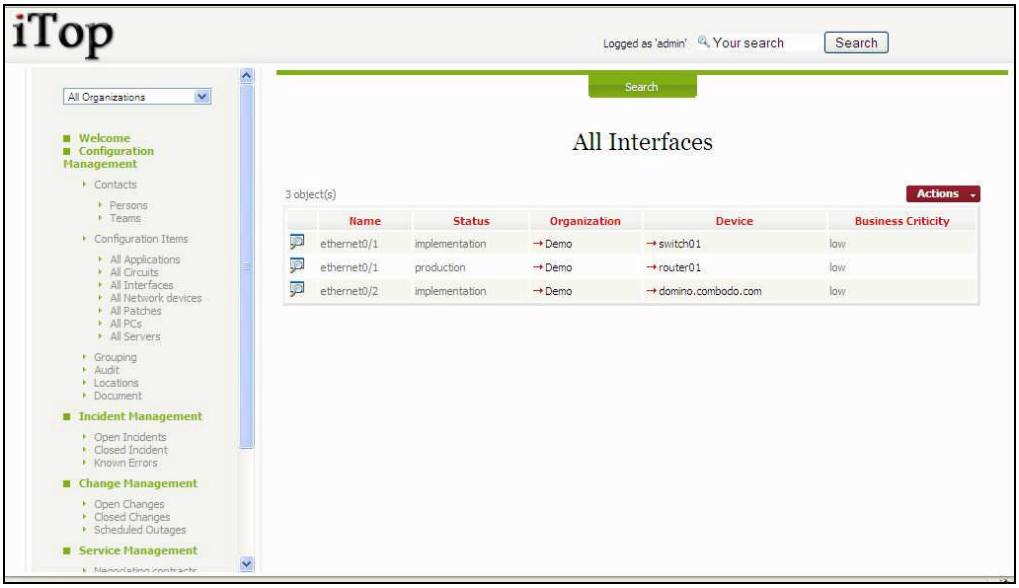


Figure 45

When you click on button you get details for selected interface.

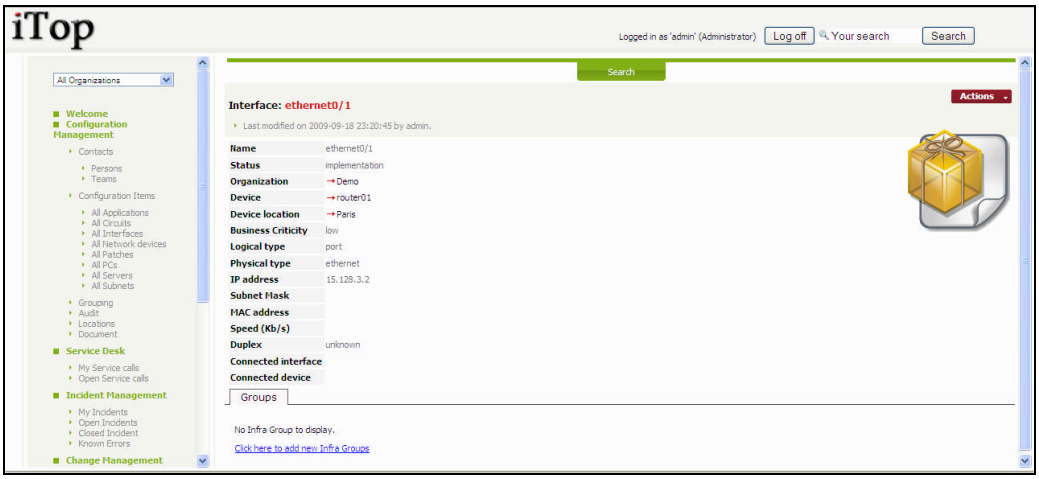


Figure 46

"Linked Interface" tab displays the interface that is connected to the one you are looking at.

To create a new interface you just have to click on "New" in action drop down list, from either interface list or a given interface detail. We recommend doing it in the Interface tab of a Server, PC or Network Device. Following wizard then appears:

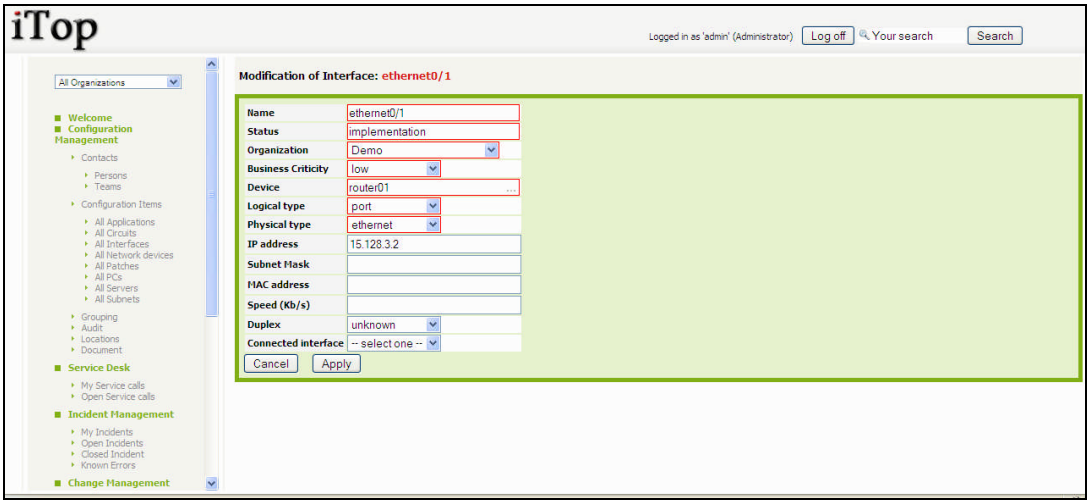


Figure 47

Fill in all fields with needed information and click on Next >>. A confirmation window appears, asking you to create the new interface. Then click on create Interface.

Managing Circuits

Circuits are used to document WAN links between different sites.
"All Circuits" menu displays all circuits for a given organization.

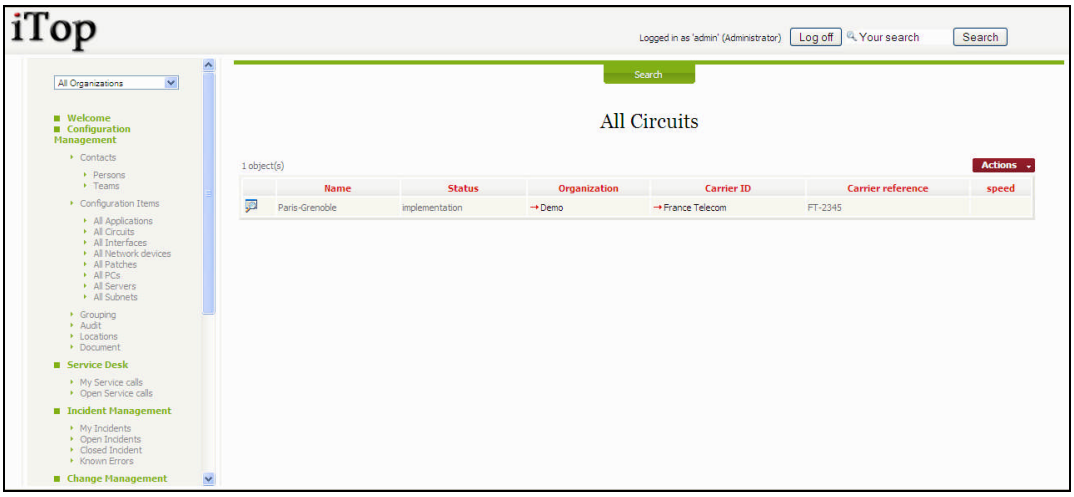


Figure 48

When you click on button you get details for selected circuit.

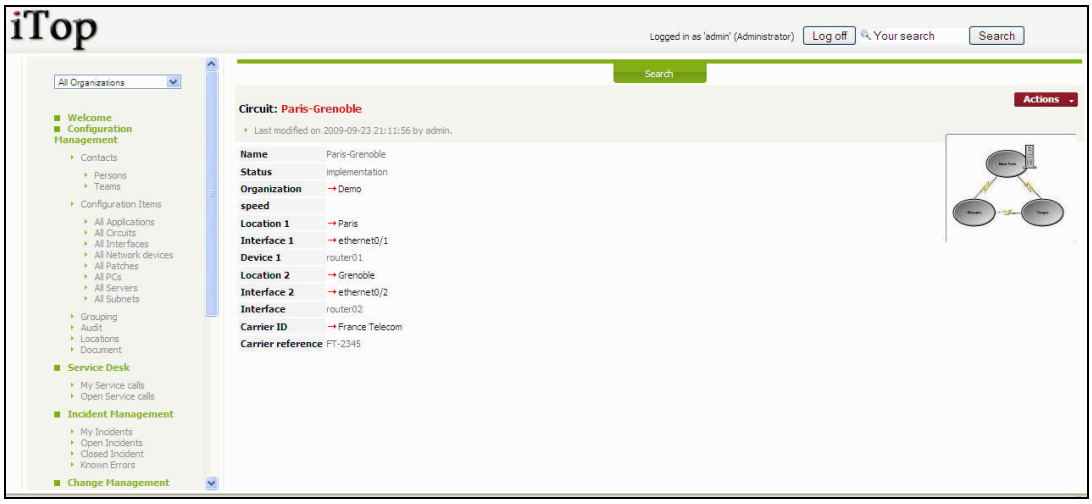


Figure 49

To create a new circuit you just have to click on “New” in action drop down list, from either circuits list or a given circuit detail. Following wizard then appears:

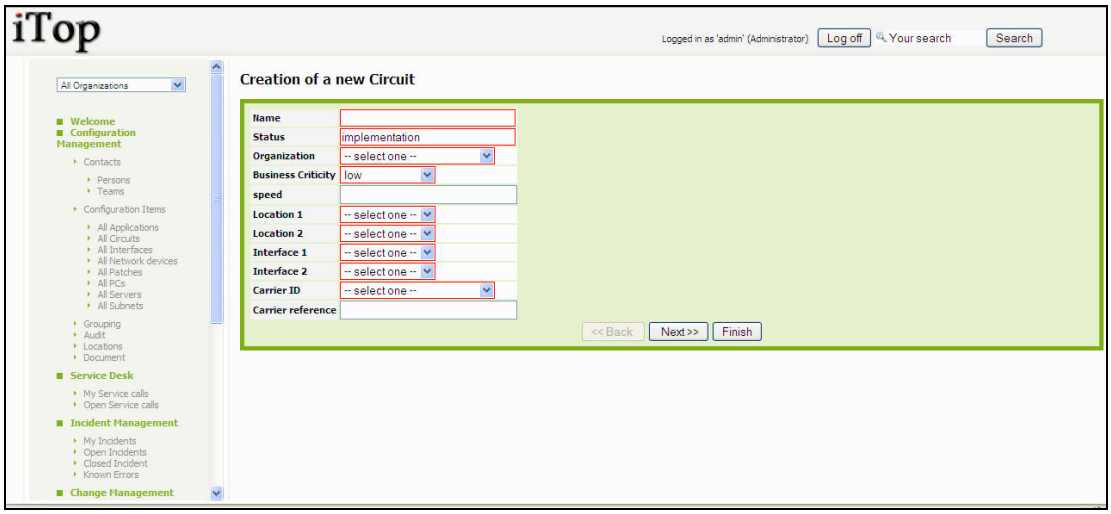


Figure 50

Fill in all fields with needed information and click on Next >>. A confirmation window appears, asking you to create the new circuit. Then click on create Circuit.

Managing Groups

Using iTop you can group object together. Groups can be used for modeling any operational need. For instance documenting all devices monitored by a given application. The “Grouping” menu displays all groups created for the selected organization.

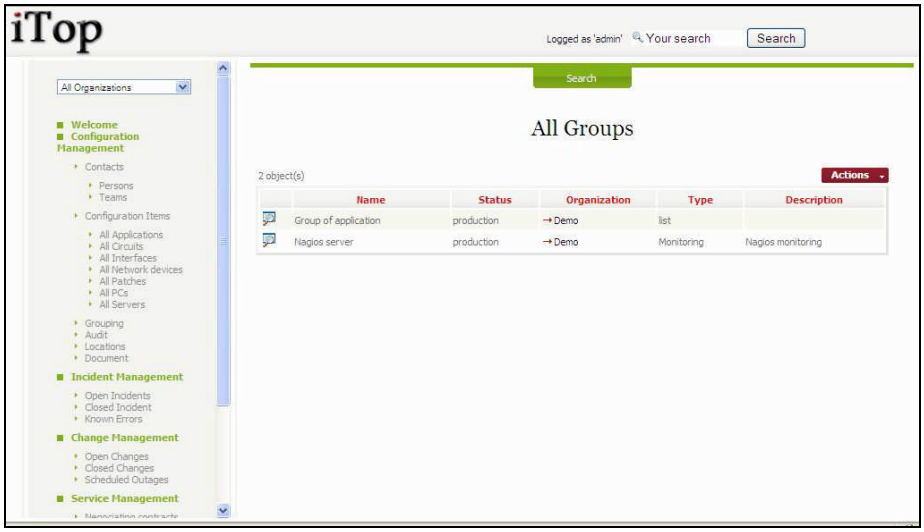


Figure 51

When you click on button you get details for selected group.

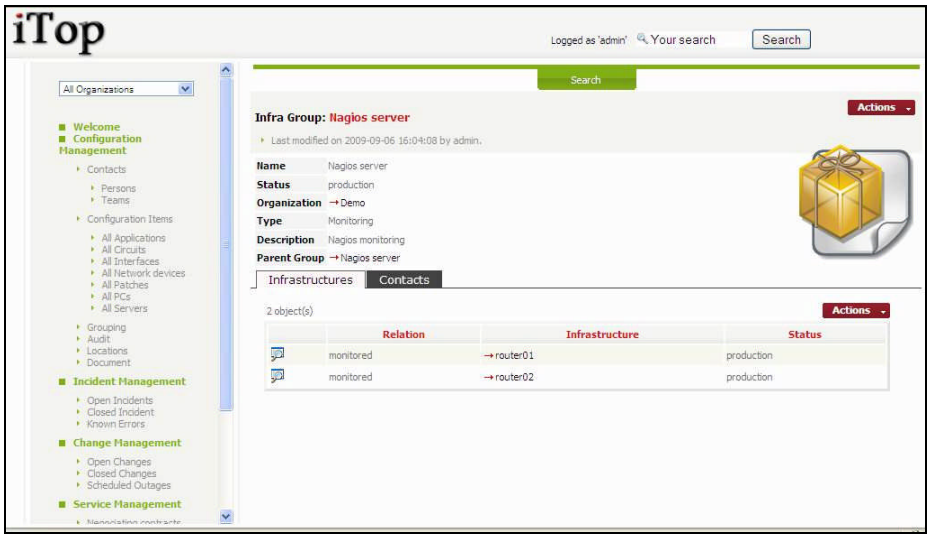


Figure 52

"Infrastructures" tab displays all CI linked to this group. You can easily manage those relationships as describe in chapter "Managing relationships"

"Contacts" tab displays all contacts related to this group, for instance the team or the people responsible for keeping this group up to date. You can easily manage those relationships as describe in chapter "Managing relationships"

To create a new group you just have to click on "New" in action drop down list, from either group list or a given group detail. Following wizard then appears:

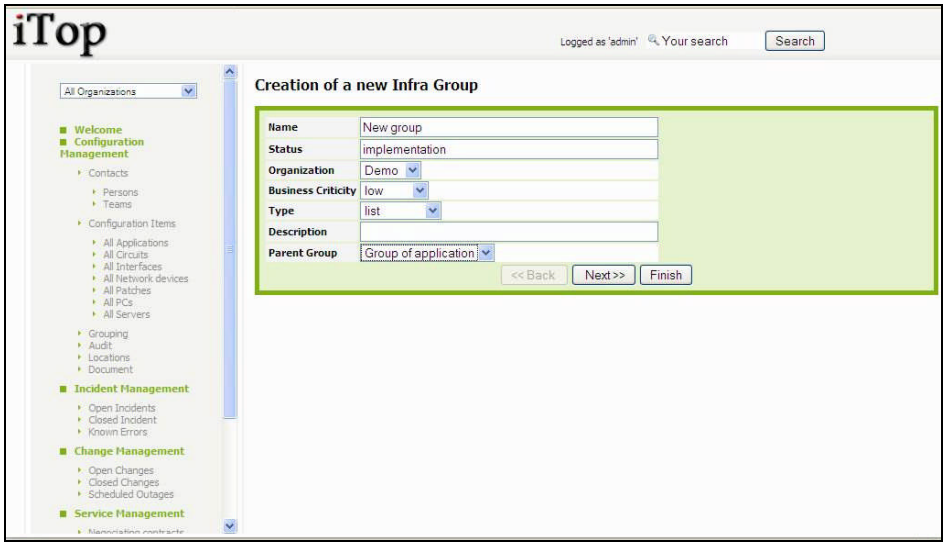


Figure 53

Fill in all fields with needed information and click on Next >>. A confirmation window appears, asking you to create the new group. Then click on create Group.

Managing Documents

Documents in iTop are used to load what ever electronic type of documents (images, pdf, word, excel ….) and link them to different types of objects (infrastructure, contracts …). The “Document” menu displays all documents stored in iTop.

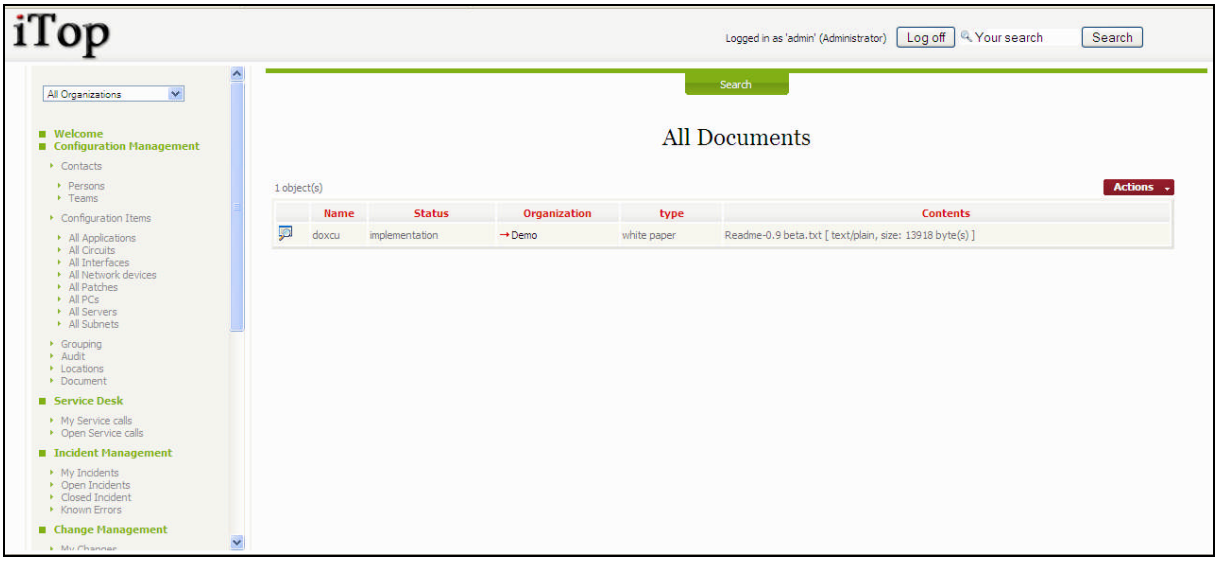


Figure 54

When you click on button you get details for selected document.

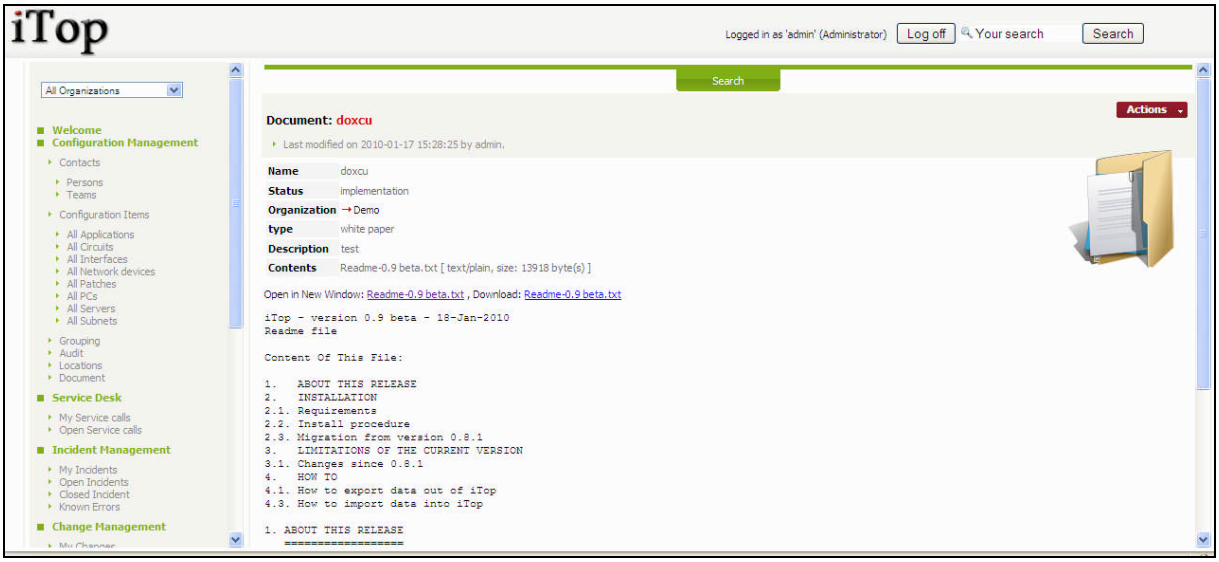


Figure 55

Depending on format of this document, the browser may automatically displays its content (gif, pdf, txt) else two web links allow you to open this document in a new window or download it.
As for any other objects, you can review history of changes made on a document, including different version of the uploaded file.

To add a new document, you just have to click on “New” in action drop down list, from either document list or a given document detail. Following wizard then appears:

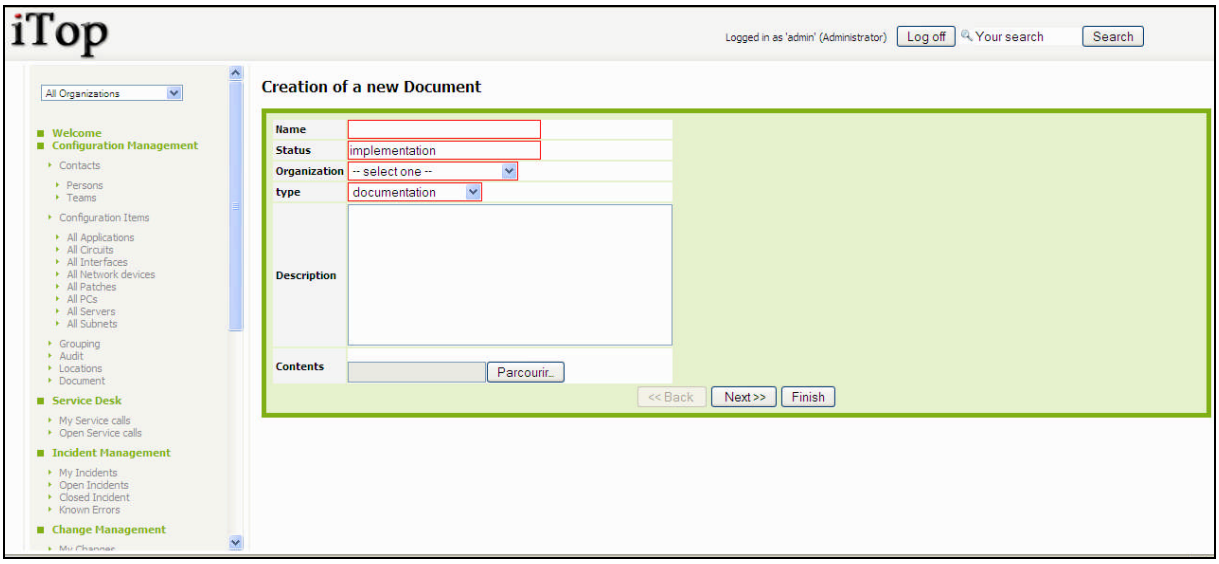


Figure 56

You can specify the organization this document belongs to, the type of this document and a description.
The button “Browse”, allows you to select the document from your local disk and upload it. Be careful, size of the document is limited to size define in php and mysql configuration file (see Administrator guide for more information).

As for any other objects, you can modify a document using “Modify” in action drop down list.

Using Audit

Audits in iTop are used to track the consistency of information stored in the application. For instance “Do I have servers on production located on a site that is under implementation?” This function is key as it make sure that the process of documenting your IT is well followed. “Audit” menu displays in a table all rules and the result of the audit computed real time.

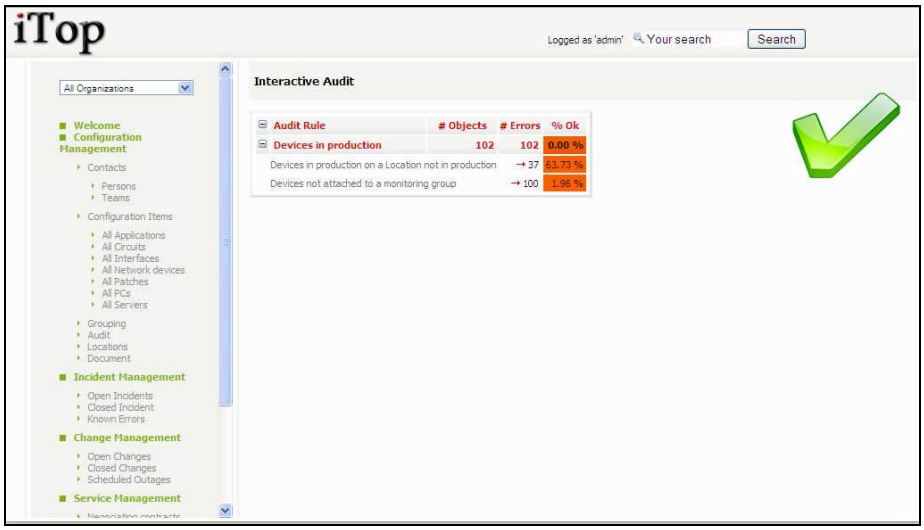


Figure 57

When you click on "# Errors" for a given rule, you get a list of object that are not documented properly:

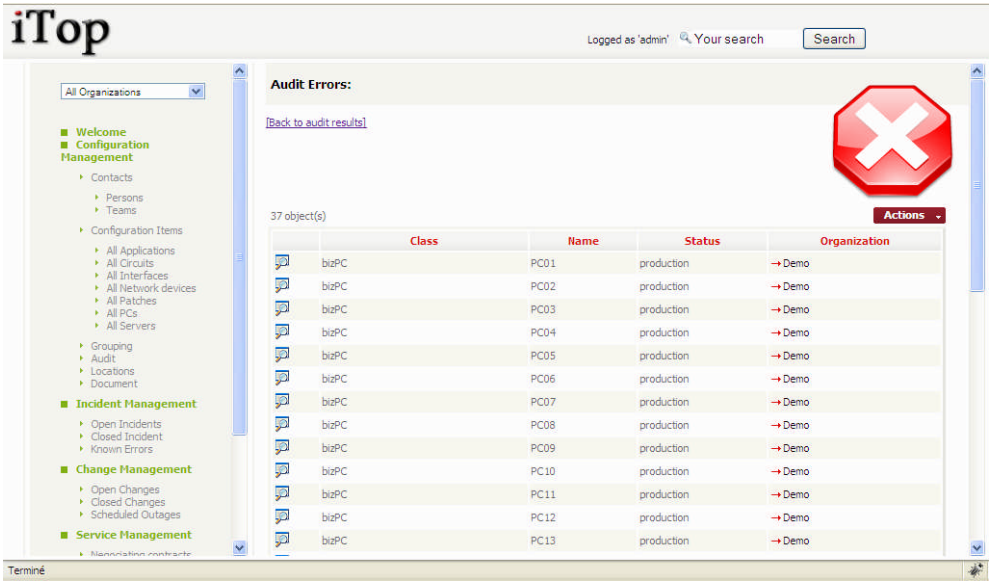


Figure 58

The administrator guide describes how to create a new rule to be checked.

Using Service Desk module

The service desk module allows you to document all service calls coming from end users. Call can by assign to workgroup that would be responsible for making sure request is handled. Those service calls can be linked to infrastructures and related incidents.

Service call life cycle

In order to enforce service desk processes, iTop includes a life cycle for service call object. Moving from one state to another will require some action from support agent, for example updating action log and resolution code before closing a ticket.

The life cycle is described in following diagram:

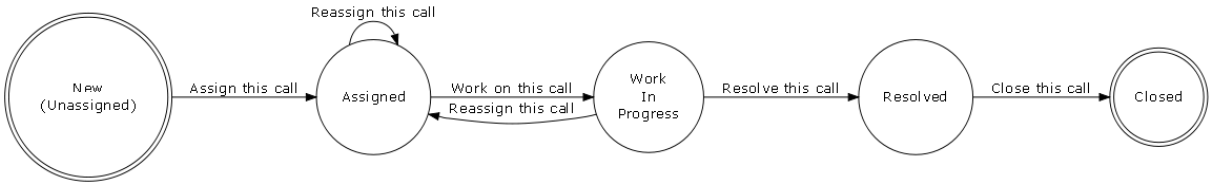


Figure 59

Viewing Service call

“Open Service calls” menu displays all service call currently open for the selected organization.

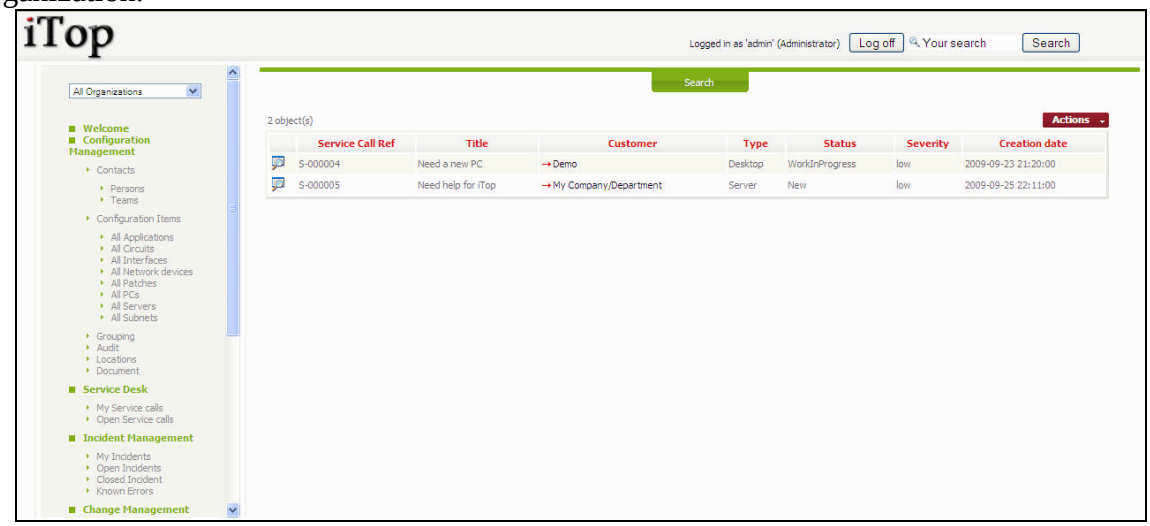


Figure 60

When you click on button you get details for selected service call.

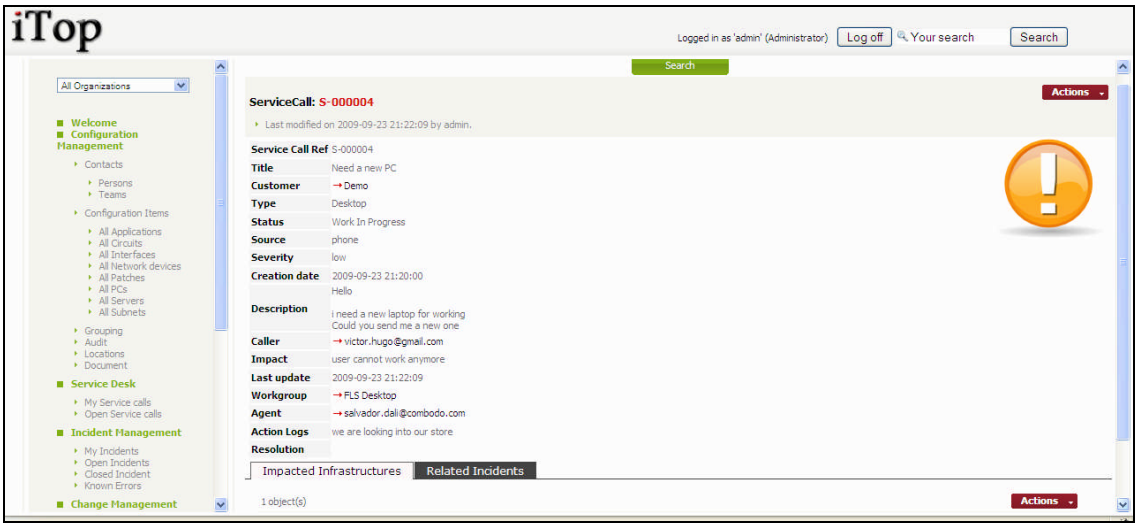


Figure 61

"Impacted Infrastructures" tab displays all infrastructures related to this service call.. You can easily manage those relationships as describe in chapter "Managing relationships"

"Related Incident" tab displays all incident tickets that are linked to this service call. This allows support agent to regroup a list of service call with a ticket that represent the root cause of the issue encountered by end users. You can easily manage those relationships as describe in chapter "Managing relationships"

Creating Service call

There are several ways to create a service call: either using

from a list of service calls and selecting "New", or from the detail page of an other service call and using

and selecting "New".

A wizard then helps you to create your service call with several steps:

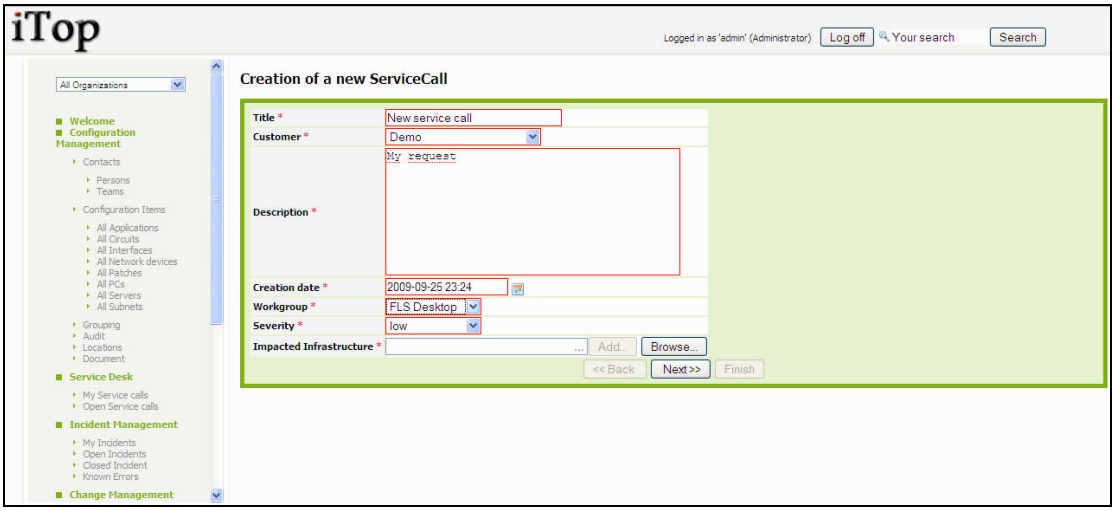


Figure 62

You can add Impacted Infrastructure by filling corresponding field and clicking on Add as many times as you want. You can also use Browse... button.

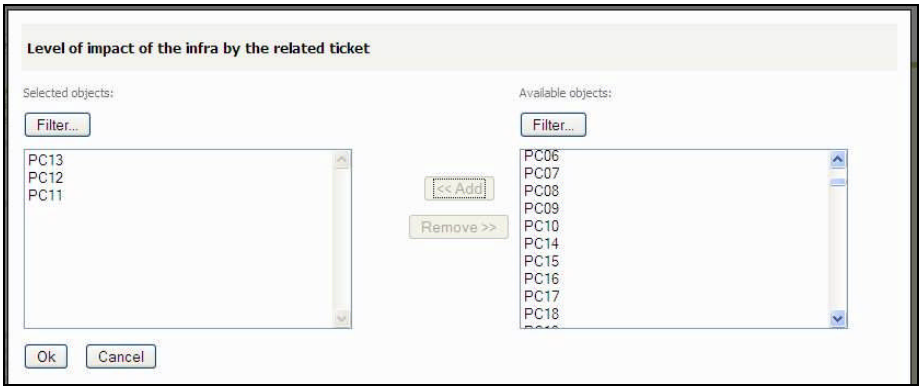


Figure 63

Once selected impacted infra, you are prompt to enter the impact

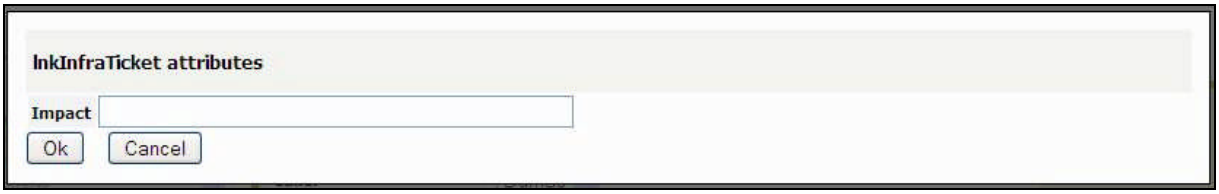


Figure 64

Once selected all impacted infrastructure click on Next >> to go to next step.
You are prompt to enter if needed ticket related to this one and caller:

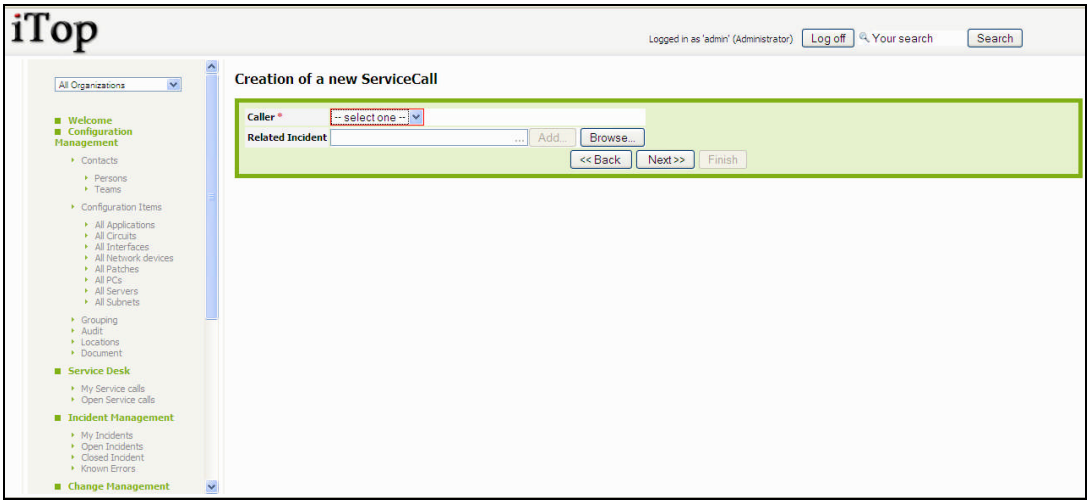


Figure 65

As for management of impacted infrastructure, you can use either Add or Browse... button to find your related tickets. Then click on Next >>

You are prompt to enter other information for the service call as type, impact, action logs …

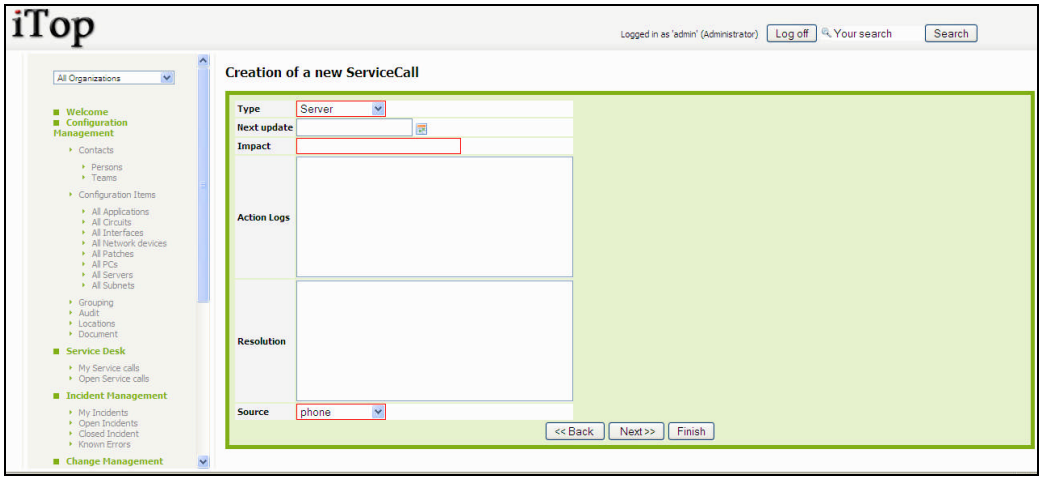


Figure 66

Click on Next >> once done. A confirmation window opens. Click on Create ServiceCall for validating the creation. The details page for the new service call open

It is important to make sure that members are assigned to the team corresponding to selected workgroup, else you won't be able to assign this service call to an agent.

Updating Service call

You can update a service call at any time, but fields you can modify depend on status of the ticket.

Assigning or re-assigning a ticket to workgroup or agent

Click on Actions button of the details page and select "Assign this call". A wizard opens to let you enter an agent.

Figure 67

Click on Assign this call for validating your change. The status of the service call changes to "assigned"

Working on a service call

When you are ready to work on a service call you can click on Actions button of the details page and select “Work on this call”.

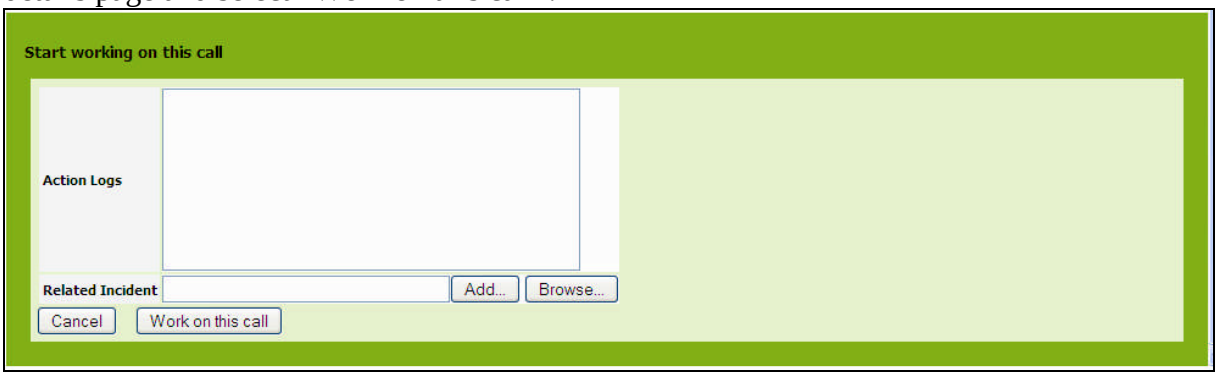


Figure 68

Click on Work on this call to validate status change. New status for this service call is “WorkInProgress”.

Resolving a service call

When the service call is resolved, you can close it. Click on Actions button of the details page and select “Resolve this call”. A wizard opens to let you enter either a resolution:

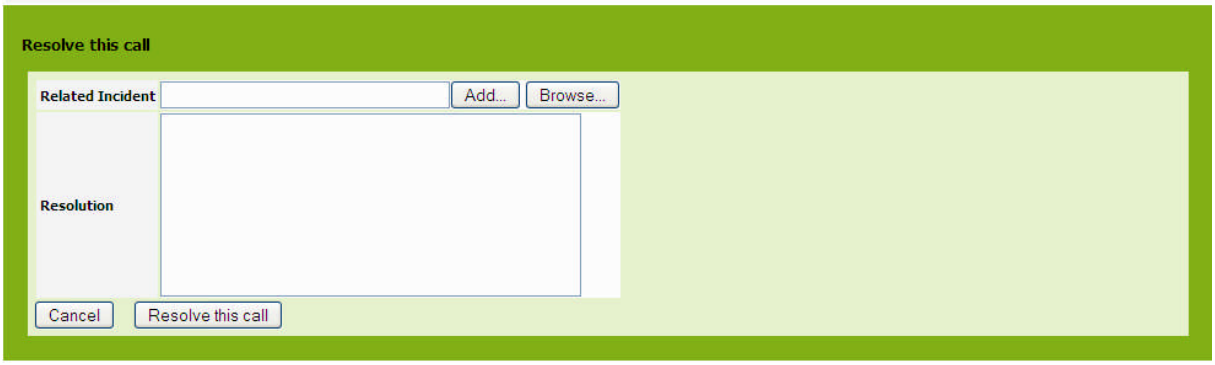


Figure 69

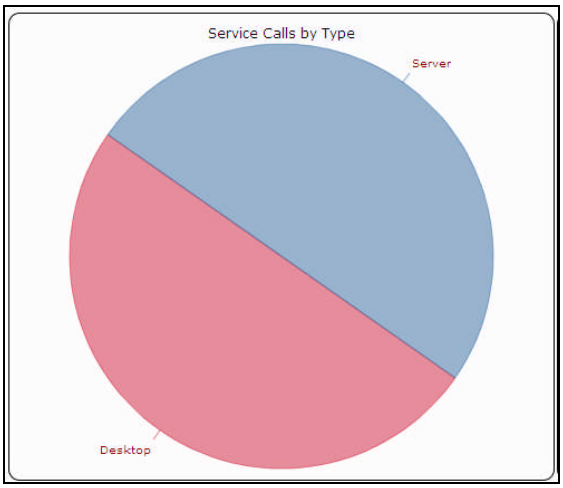
Click on Resolve this call for closing the incident ticket. Status is now “Resolved”. You won’t be able to change this ticket anymore.

Service call Dashboard

The green menu “Service Desk”, displays dashboard for service desk module. It help support organization to track:

Service Call by type

Service call by status



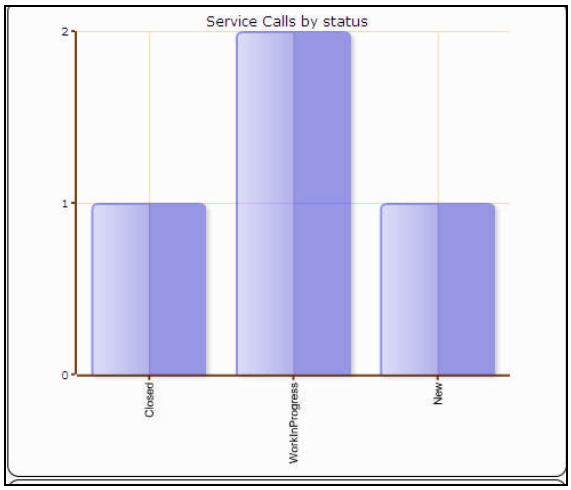
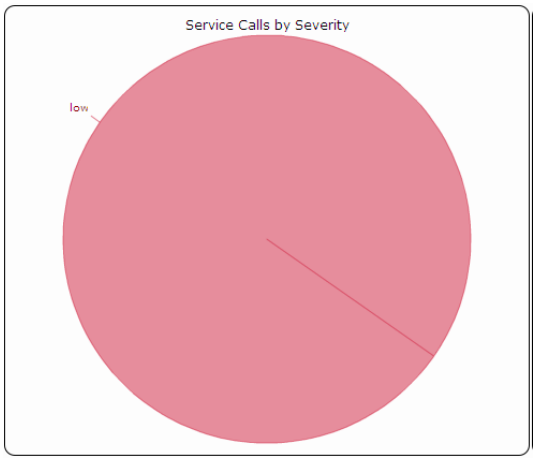


Figure 70

Service call by Severity



Service calls not yet assigned

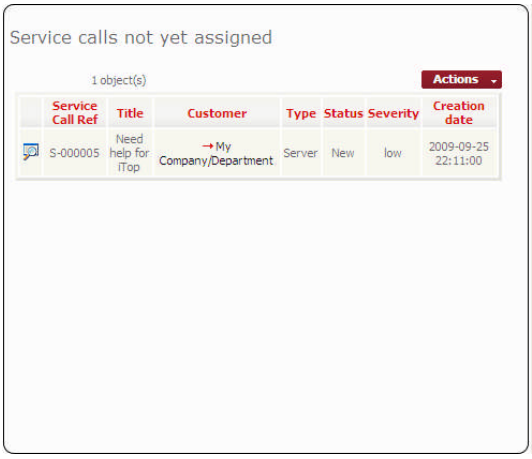


Figure 71

Using Incident management module

The incident management module allows you to manage any incident ticket occurring in your environment as describe by ITIL best practices.

It allows support agent to create workgroup, and different type of incidents. In order to focus on most critical issues, they can use different level of severity. They can also easily document infrastructures impacted and contact to be notified.
A Known Error data base allows to document resolution procedure for recurring issues and by this way reduces the time to solve them.

Incident life cycle

In order to enforce incident management process, iTop includes a life cycle for incident object. Moving from one state to another will require some action from support agent, for example updating action log and resolution code before closing a ticket.

The life cycle is described in following diagram:

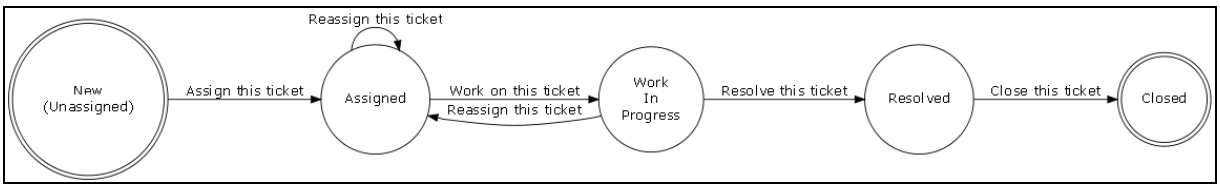


Figure 72

Viewing Incident

"Open Incidents" menu displays all incident ticket currently open for the selected organization.

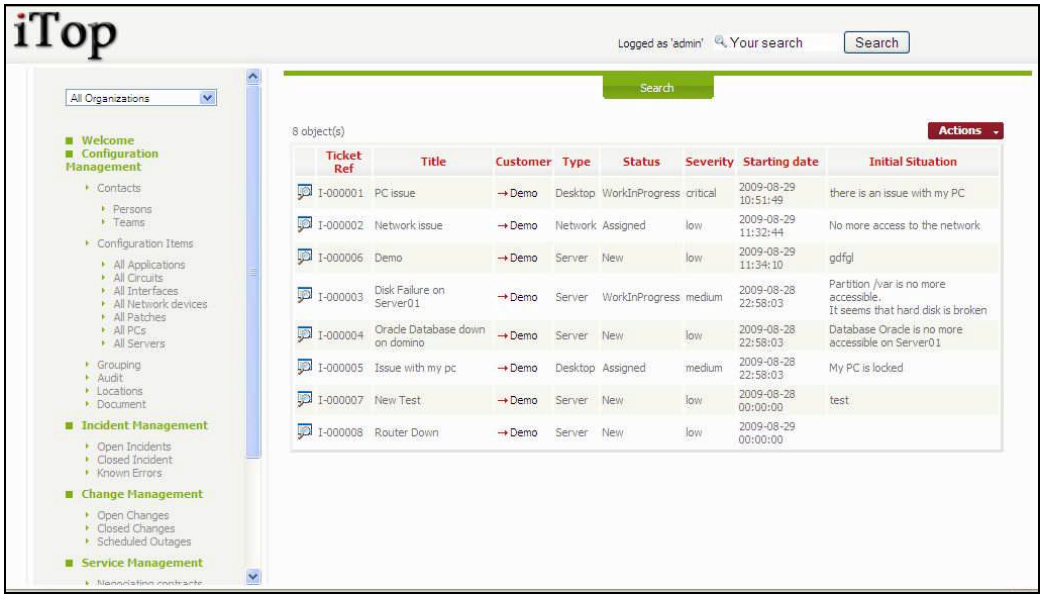


Figure 73

When you click on button you get details for selected incident.

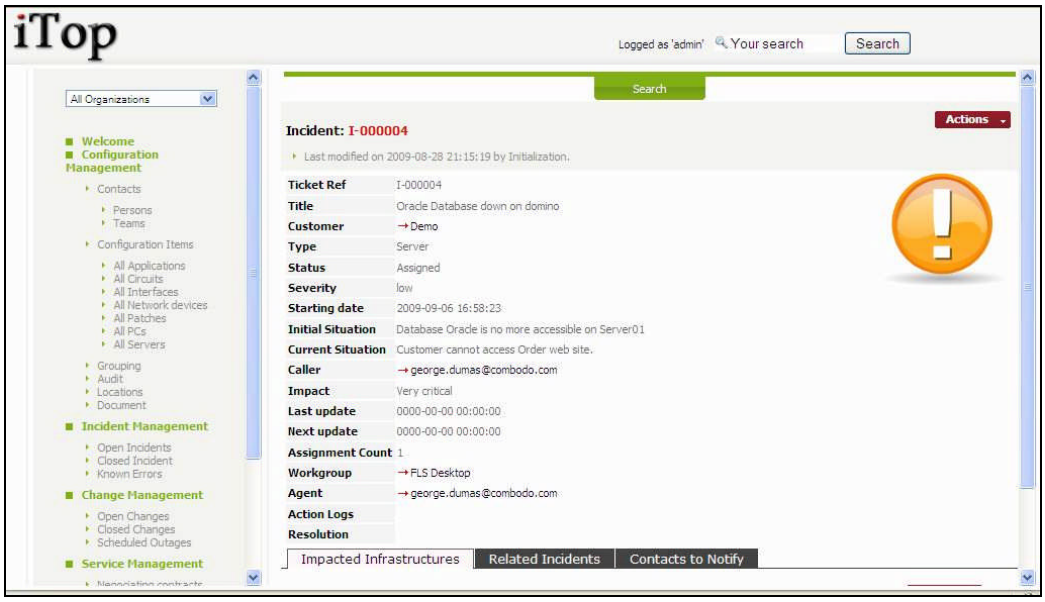


Figure 74

"Impacted Infrastructures" tab displays all infrastructures impacted by this incident. This allows support agent to document how each of them are impacted. You can easily manage those relationships as describe in chapter "Managing relationships"

"Related Incident" tab displays all other incident tickets that are linked to this one. This allows support agent to regroup a list of ticket with a master ticket that represent the root cause of the incident. You can easily manage those relationships as describe in chapter "Managing relationships"

"Contacts to Notify" tab displays all contacts that need to be kept update during the whole life of this ticket. You can easily manage those relationships as describe in chapter "Managing relationships"

Creating incident

There are several ways to create an incident ticket: either using Actions from a list of incident ticket and selecting "New", or from the detail page of an other incident ticket and using Actions and selecting "New".

A wizard then helps you to create your incident with several steps:

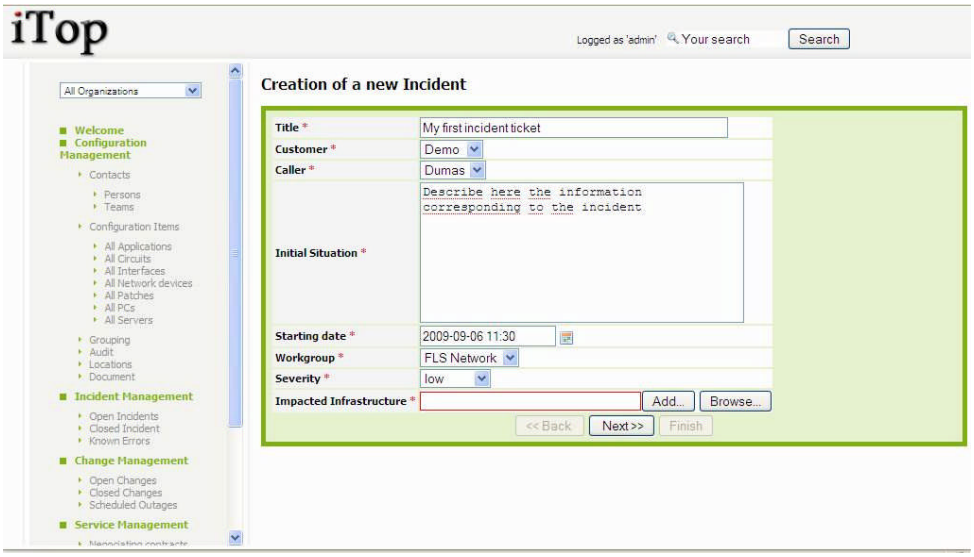
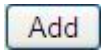
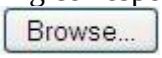


Figure 75

You can add Impacted Infrastructure by filling corresponding field and clicking on 

as many times as you want. You can also use 

button.

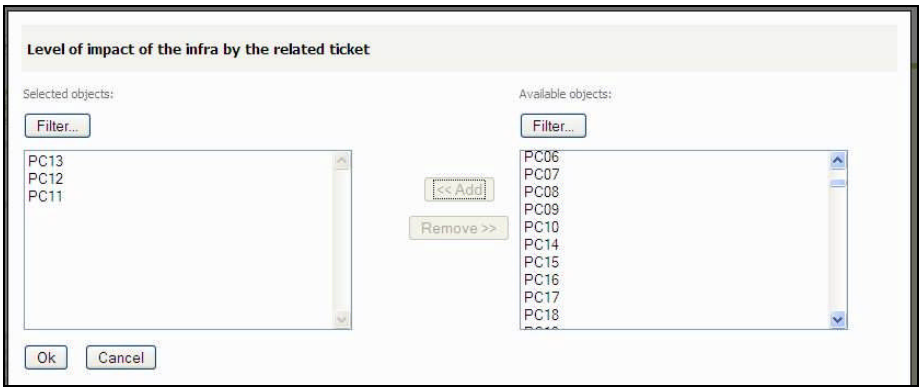


Figure 76

Once selected impacted infra, you are prompt to enter the impact

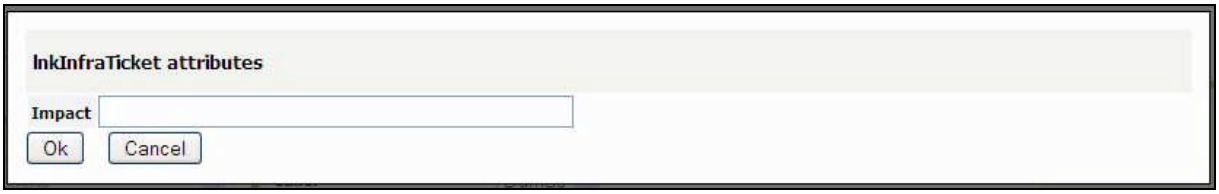
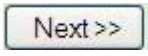


Figure 77

Once selected all impacted infrastructure click on 

to go to next step.
You are prompt to enter if needed ticket related to this one:

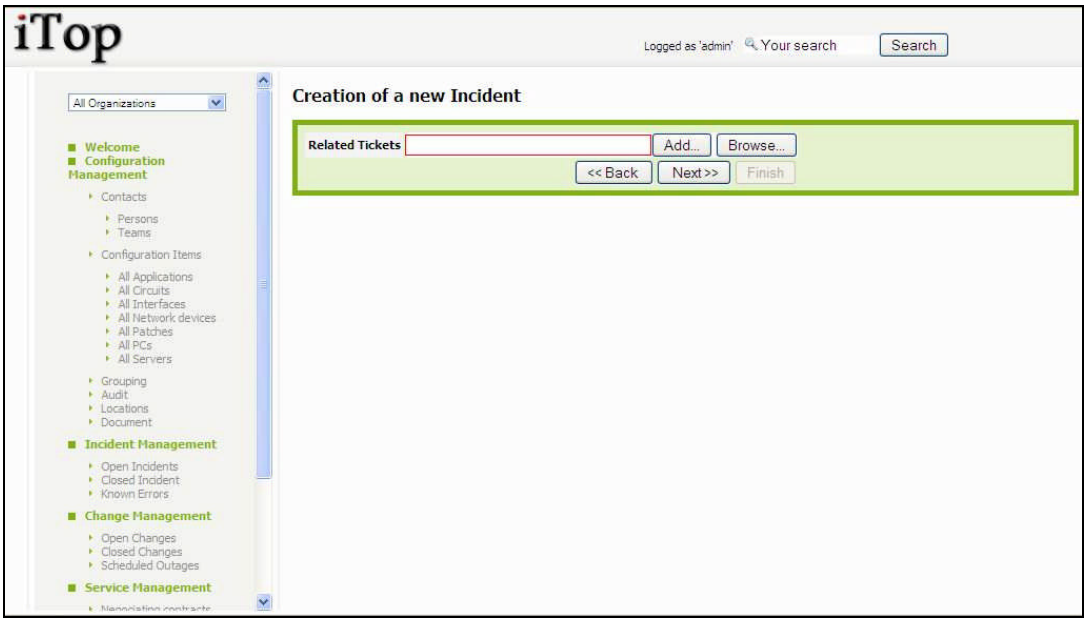


Figure 78

As for management of impacted infrastructure, you can use either Add or Browse... button to find your related tickets. Then click on Next >>

You are prompt to enter other information for the ticket as type, global impact, action logs …

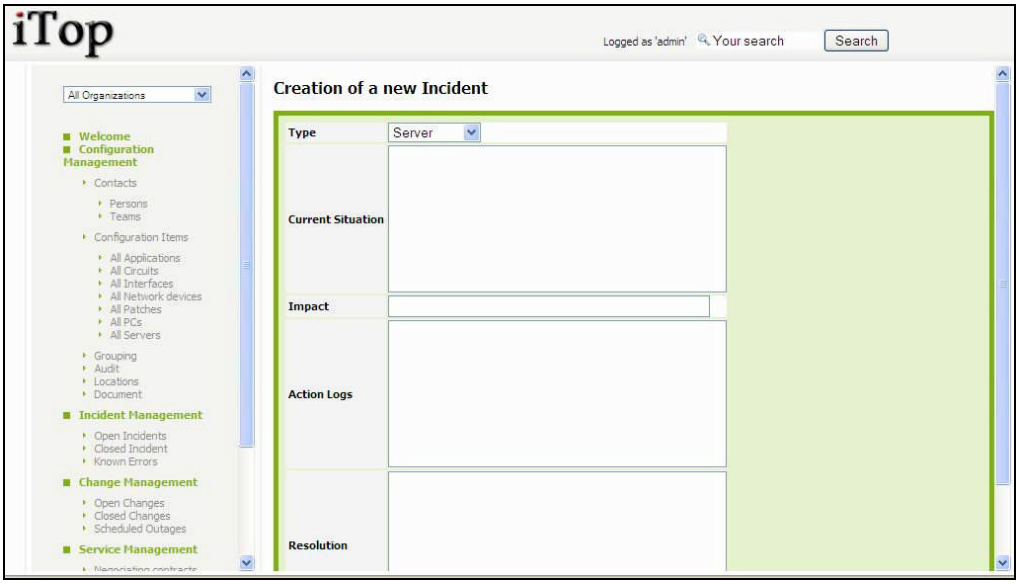


Figure 79

Click on Next >> once done. A confirmation window opens. Click on Create IncidentTicket for validating the creation. The details page for the new ticket open

It is important to make sure that members are assigned to the team corresponding to selected workgroup; else you won't be able to assign this incident to an agent.

Updating incident

You can update an incident ticket at any time, but fields you can modify depend on status of the ticket.

Assigning or re-assigning a ticket to workgroup or agent

Click on Actions button of the details page and select “Assign this ticket”. A wizard opens to let you enter either a new workgroup and select an agent.

Figure 80

Click on Assign this ticket for validating your change. The status of the ticket changes to “assigned”

Working on an incident ticket

When you are ready to work on an ticket you can click on Actions button of the details page and select “Work on this ticket”.

Figure 81

Click on Work on this ticket to validate status change. New status for this ticket is “WorkInProgress”.

Closing an incident ticket

When the incident is fixed, you can close it. Click on Actions button of the details page and select “Close this ticket”. A wizard opens to let you enter either a resolution:

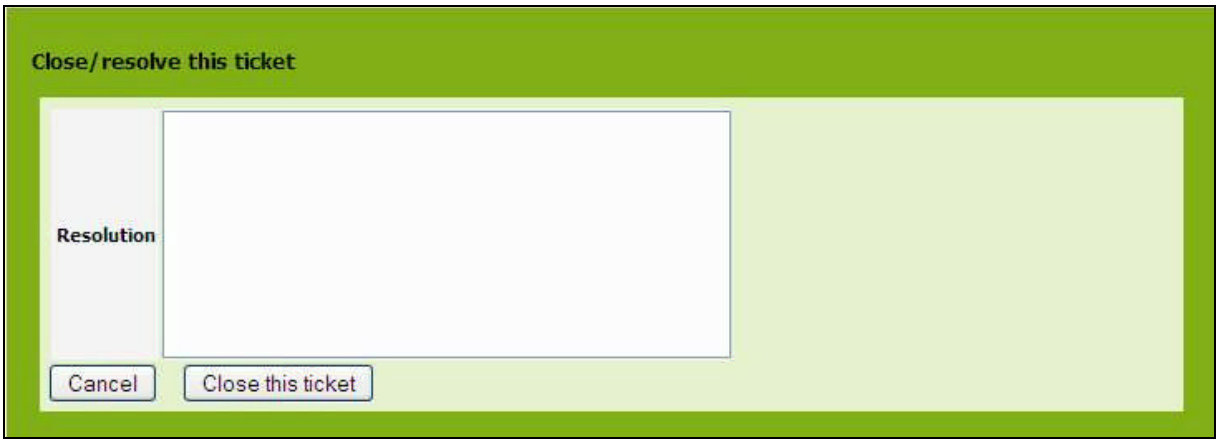


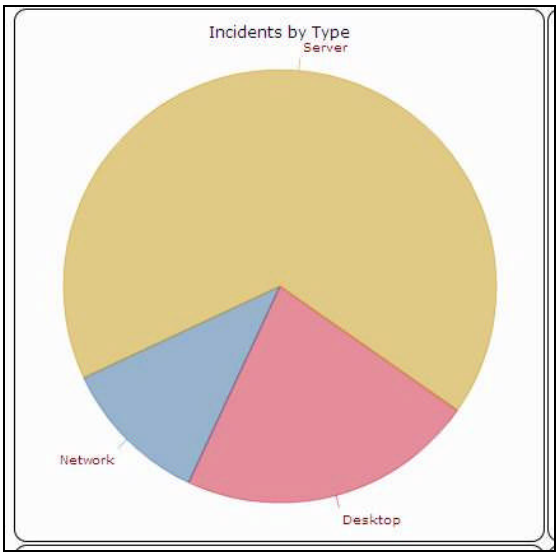
Figure 82

Click on Close this ticket for closing the incident ticket. Status is now “Closed”. You won’t be able to change this ticket anymore.

Incident Dashboard

The green menu “Incident Management”, displays dashboard for incident management module. It help support organization to track:

Ticket by type



Ticket by status

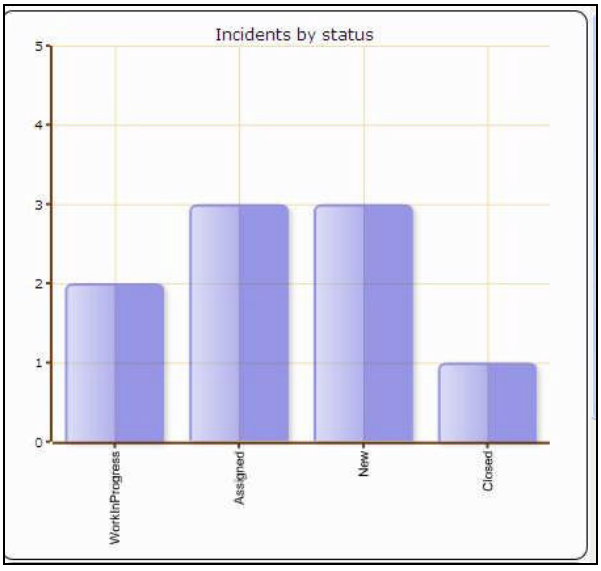


Figure 83

Ticket by workgroup

Ticket not yes assigned to any agent

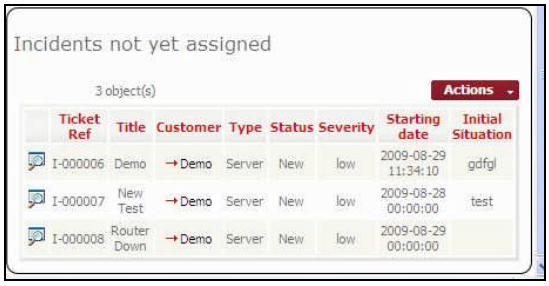


Figure 84

Using Change management module

The change management module allows change manager, change supervisor and change implementer to deal with changes occurring in your IT as described in ITIL best practices.

It allows those people to define which infrastructure will be impacted, and who will need to be notified.
It also document outages in advance to inform end users.

Change life cycle

In order to enforce change management process, iTop includes a life cycle for change object. Moving from one state to another will require some action from change manager, supervisor or implementer, for example planning a change

The life cycle is described in following diagram:

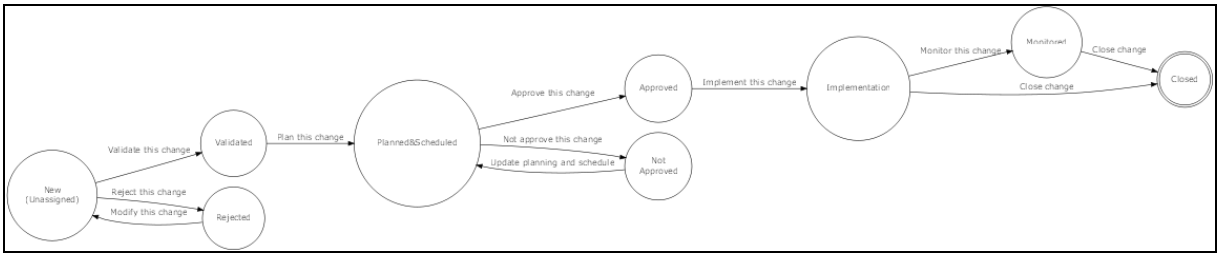


Figure 85

Viewing changes

“Open changes” menu displays all change ticket currently open for the selected organization

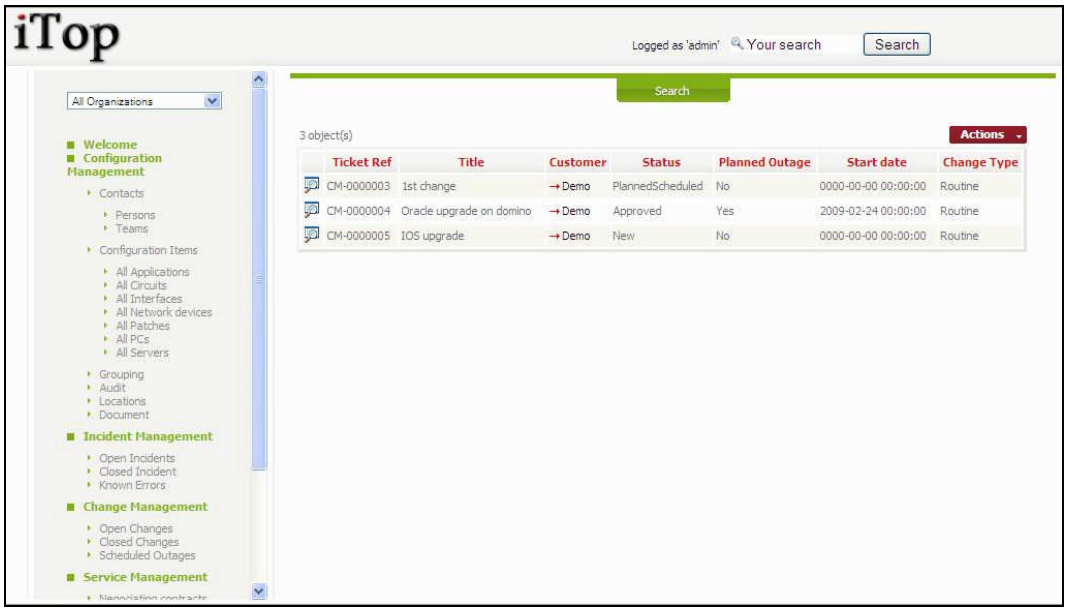


Figure 86

When you click on button you get details for selected change.

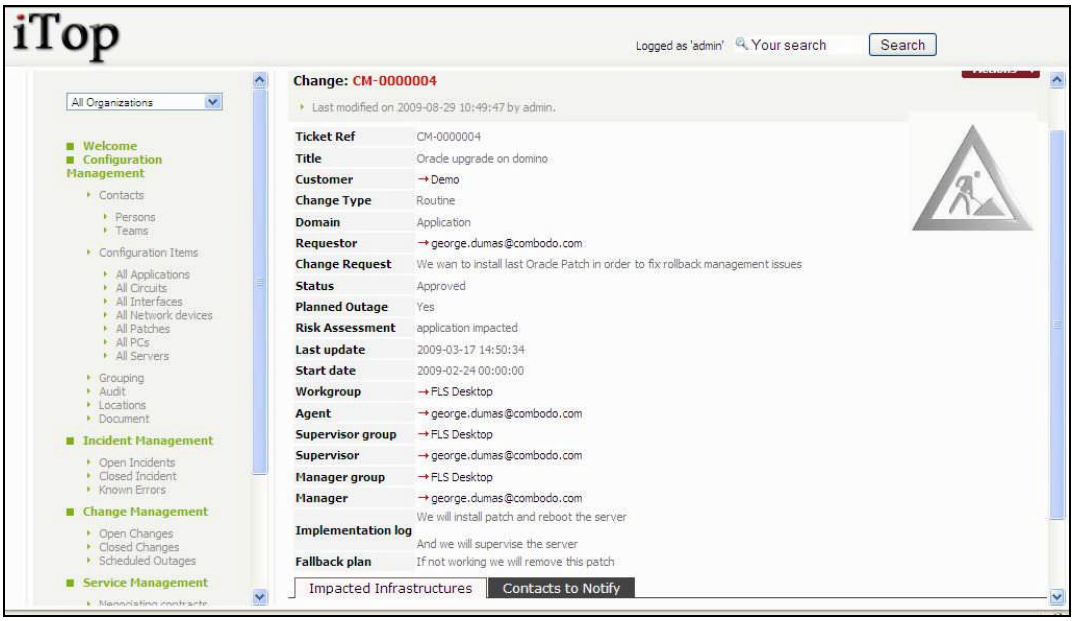


Figure 87

“Impacted Infrastructures” tab displays all infrastructures impacted by this change. This allows support agent to document how each of them are impacted. You can easily manage those relationships as describe in chapter “Managing relationships”

“Contacts to Notify” tab displays all contacts that need to be kept update during the whole life of this ticket. You can easily manage those relationships as describe in chapter “Managing relationships”

Creating a new change

There are several ways to create a changeticket: either using Actions from a list of change ticket and selecting “New”, or from the detail page of another change ticket and using Actions and selecting “New”.

A wizard then helps you to create your change with several steps:

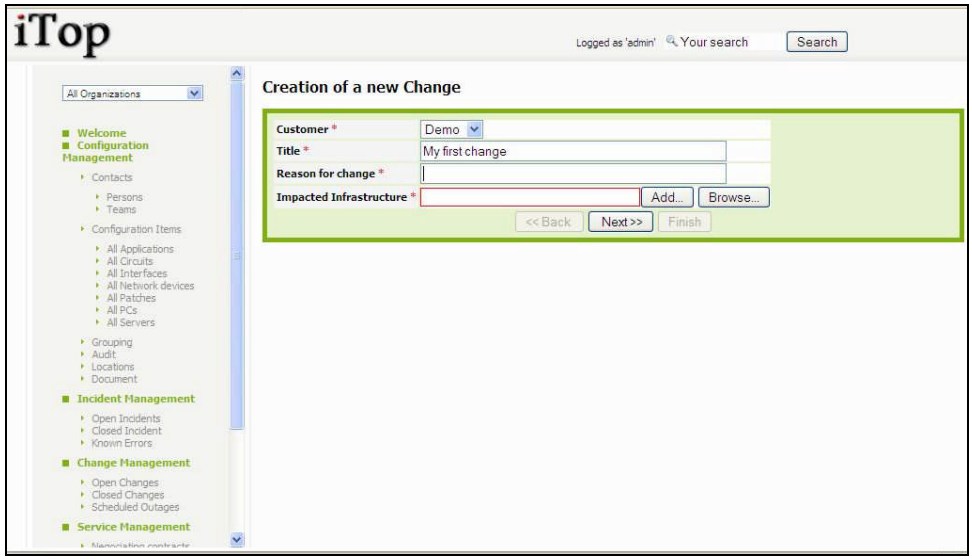


Figure 88

You can add Impacted Infrastructure by filling corresponding field and clicking on Add as many times as you want. You can also use Browse... button.

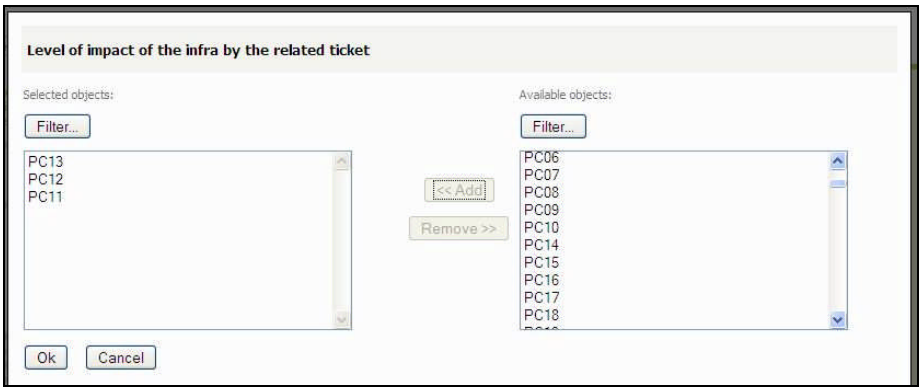


Figure 89

Once selected impacted infra, you are prompt to enter the impact

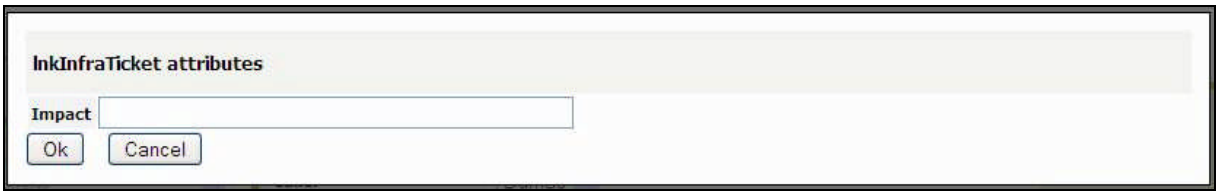


Figure 90

Once selected all impacted infrastructure click on

to go to next step.
You are prompt to enter other information for this change:

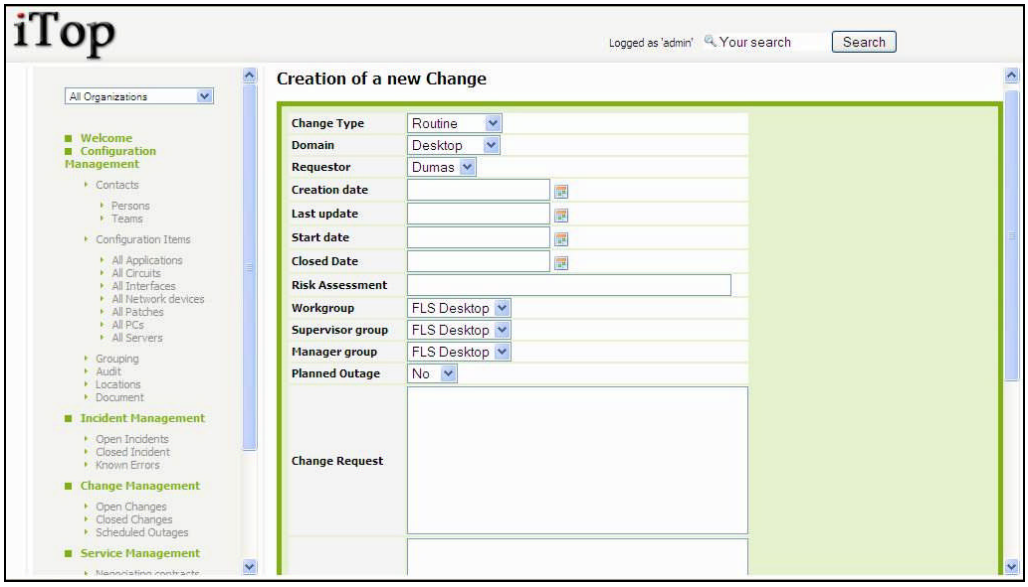
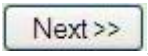


Figure 91

Once done, click on 

, you are prompt with a summary window that let you create your change:

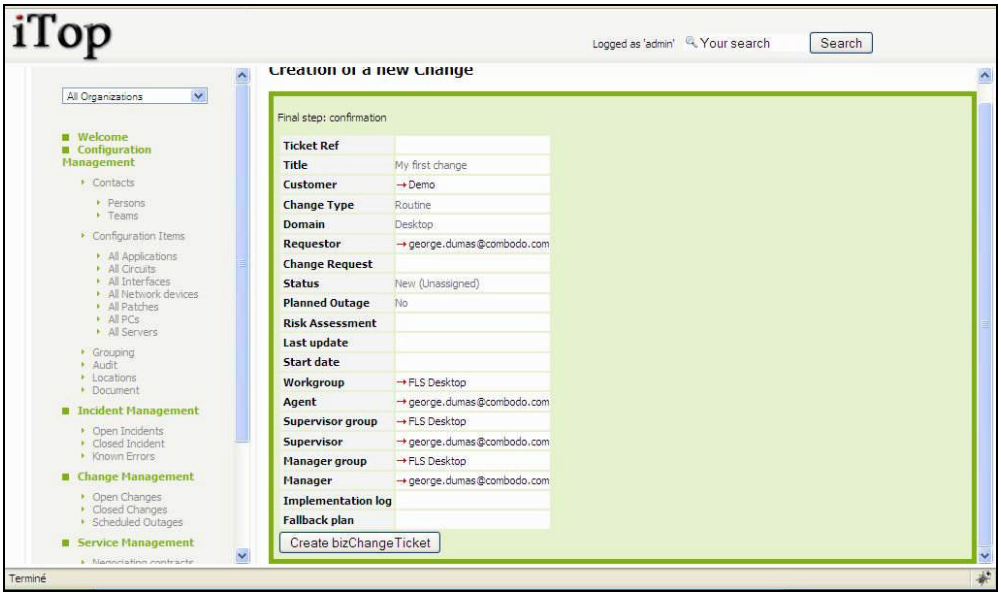


Figure 92

It is important to make sure that members are assigned to the team corresponding to selected workgroups (implementer, supervisor, manager); else you won't be able to assign this change to people responsible for implementing, supervising, and approving this change.

Updating a change

The life cycle defined for a change ticket allows you to follow you change management process.

Validating change

Once the ticket created you can validate that the caller is allowed to request this change or reject it. To do this click in details page of the change ticket on Actions and select either "validate this change" or "reject this change". A window similar to the following one prompts you to confirm your choice:

Figure 93

Planning a change

Once validated, you have to plan your change. To do this click in details page of the change ticket on Actions and select "Plan this change". Your are prompted by a window asking you to define the risk, what will be implemented, as well as the fallback plan.

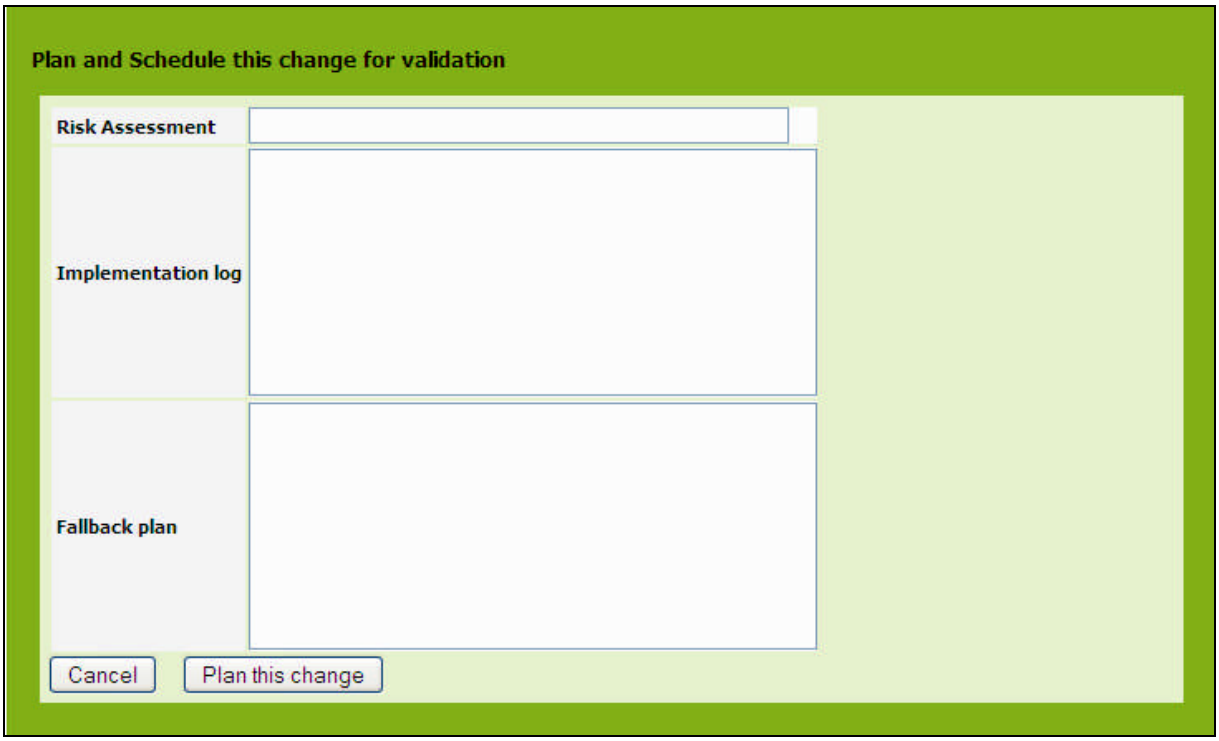


Figure 94

Approving a change

Once a change is planned, you can approve it or not. To do this click in details page of the change ticket on Actions and select either “approve this change” or “Not approve this change”. In case you don’t approve it, the change will have to be planned again. Else the change status is changed to “approved”.

Implementing a change

Once a change is approved, you can implement it. To do this click in details page of the change ticket on Actions and select “implement this change”. A confirmation window appears:

Figure 95

The status of the change ticket is now “implementation”.

Monitoring and closing a change ticket

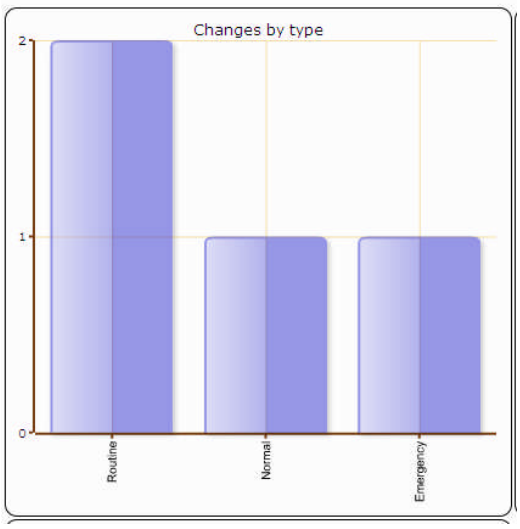
Once a change is implemented you can either monitor it, for instance to check that everything is fine, or close it directly. To do this click in details page of the change ticket on

and select either “monitor this change” or “close this change”. If you decide to monitor it, you will have to close it after.

Change dashboard

The green menu “Change Management”, displays dashboard for change management module. It helps support organization to track:

Changes by type



Changes by status

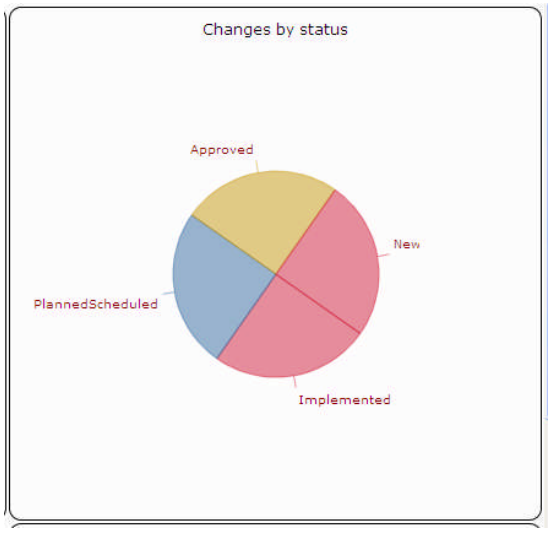
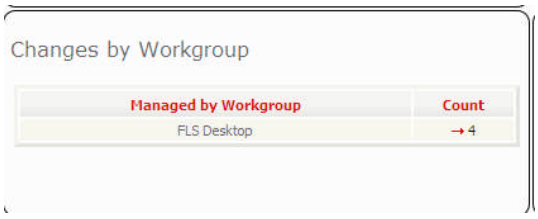


Figure 96

Changes by workgroup



Changes not assigned

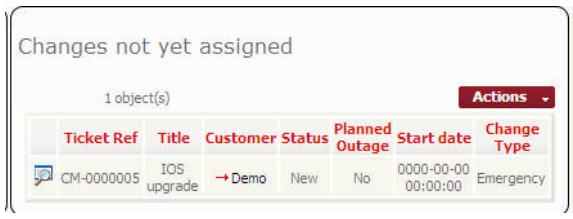


Figure 97

Using Service management module

The service management module allows service manager to deal with the service definition and provider manager to manage their contract with third party provider.

It allows documenting all services provided by a given provider, and which organization is using it.

You can also document all your contracts with service providers, which infrastructure are covered, cost of the service, and contacts managing it.

Viewing services provided by an organization

“all services” menu displays all services provided by selected organization

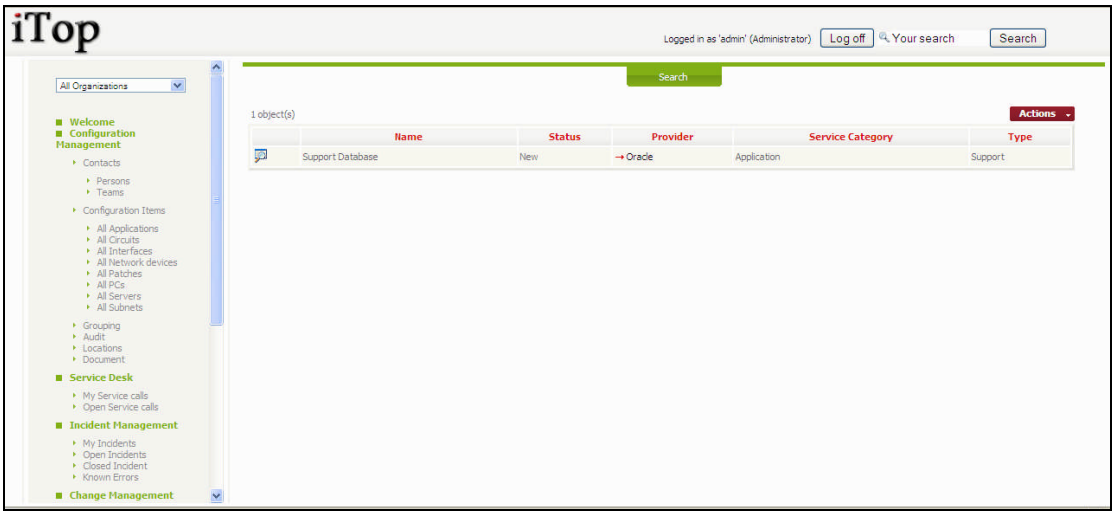


Figure 98

When you click on button you get details for selected service

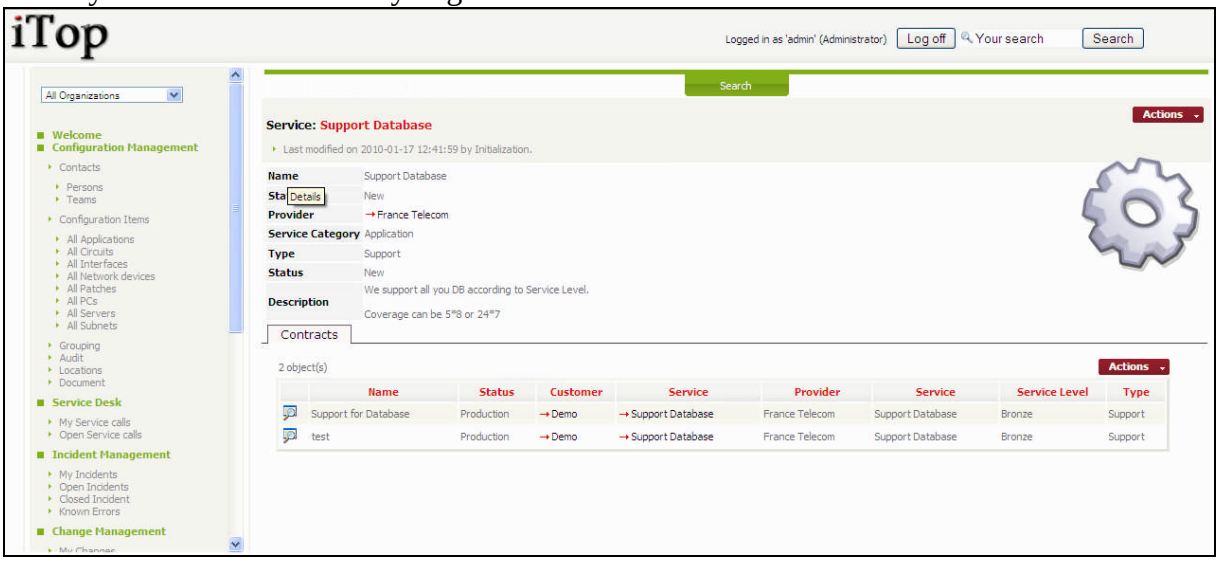


Figure 99

Creating a new service

There are several ways to create a service: either using

from a list of service and selecting “New”, or from the detail page of another service and using

and selecting “New”.

A wizard then helps you to create your service:

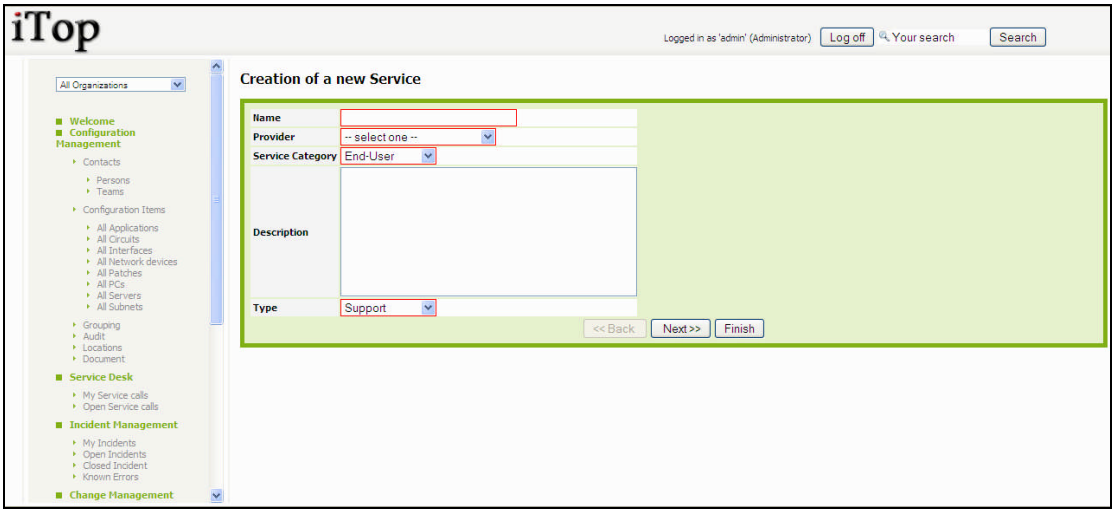


Figure 100

Once done, click on

, you are prompt with a summary window that let you create your service:

Viewing contract used by a given organization

“all contracts” menu displays all contracts between selected organization and providers.

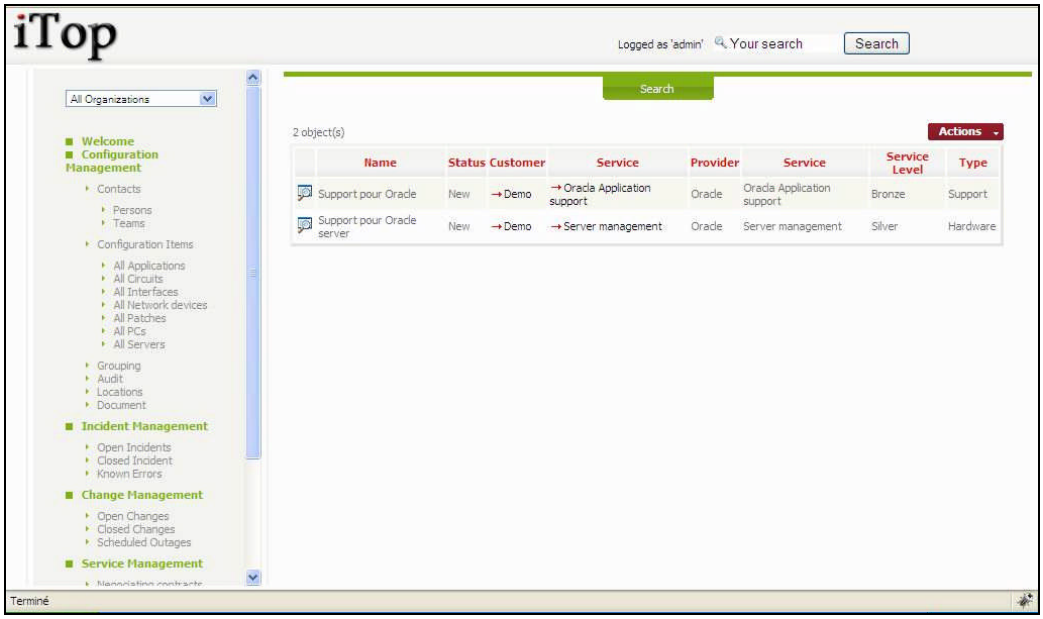


Figure 101

When you click on button you get details for selected contract

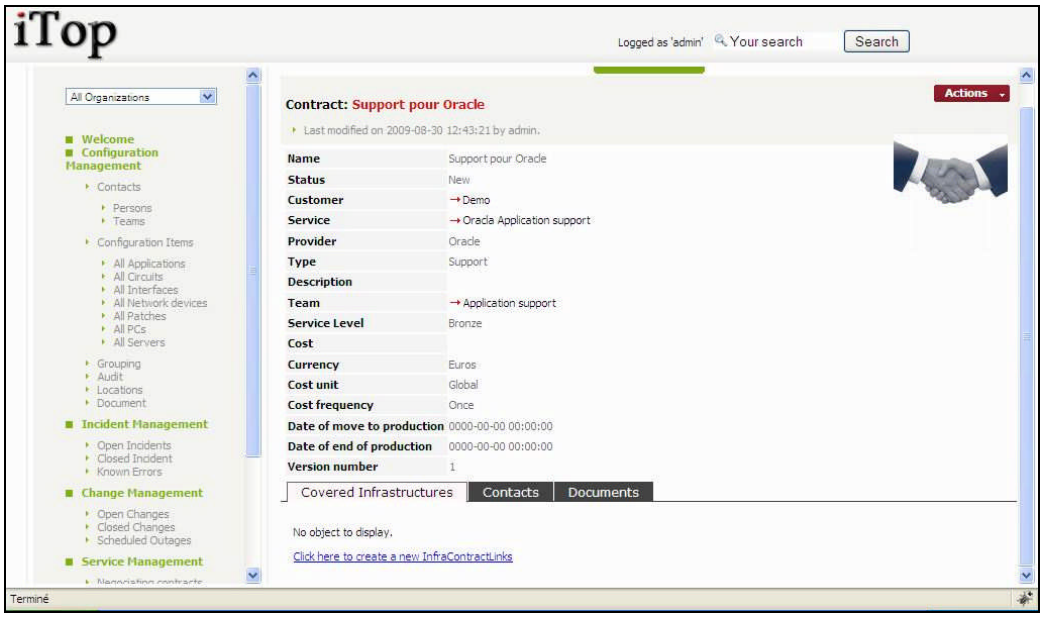


Figure 102

"Covered infrastructures" tab displays list of infrastructures covered by this contracts, as well as coverage window 24*7,5*8 … You can easily manage those relationships as describe in chapter "Managing relationships"

"Contacts" tab displays all contacts for this contract and their role. You can easily manage those relationships as describe in chapter "Managing relationships"

"Documents" tab displays all documents related to this contract. You can easily manage those relationships as describe in chapter "Managing relationships"

Creating new contract

There are several ways to create a contract: either using Actions from a list of contract and selecting "New", or from the detail page of another contract and using Actions and selecting "New".

A wizard then helps you to create your contract:

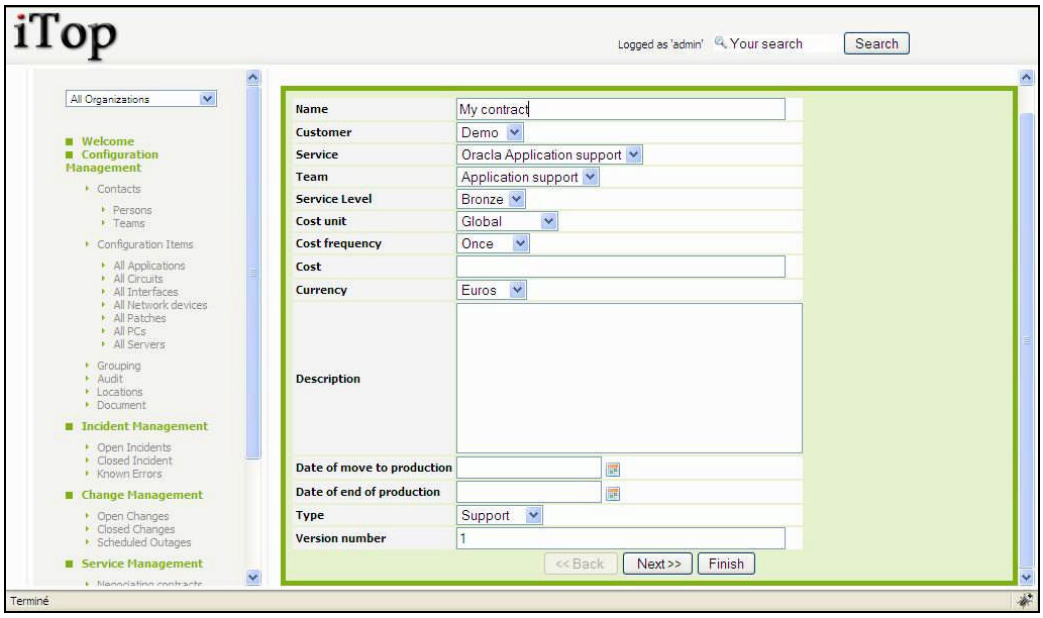


Figure 103

Once done, click on , you are prompt with a summary window that let you create your contract:

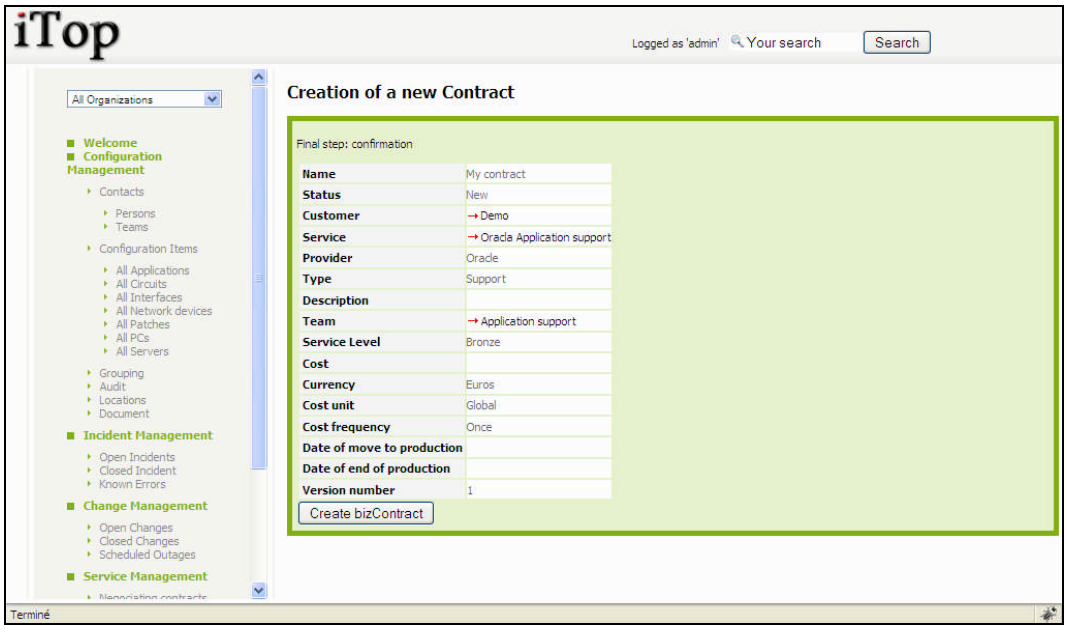


Figure 104

Updating a contract

You can use Modify functionality to change value for attributes, but to move from one state to another, you have to use life cycle actions available in menu.

Service management dashboard

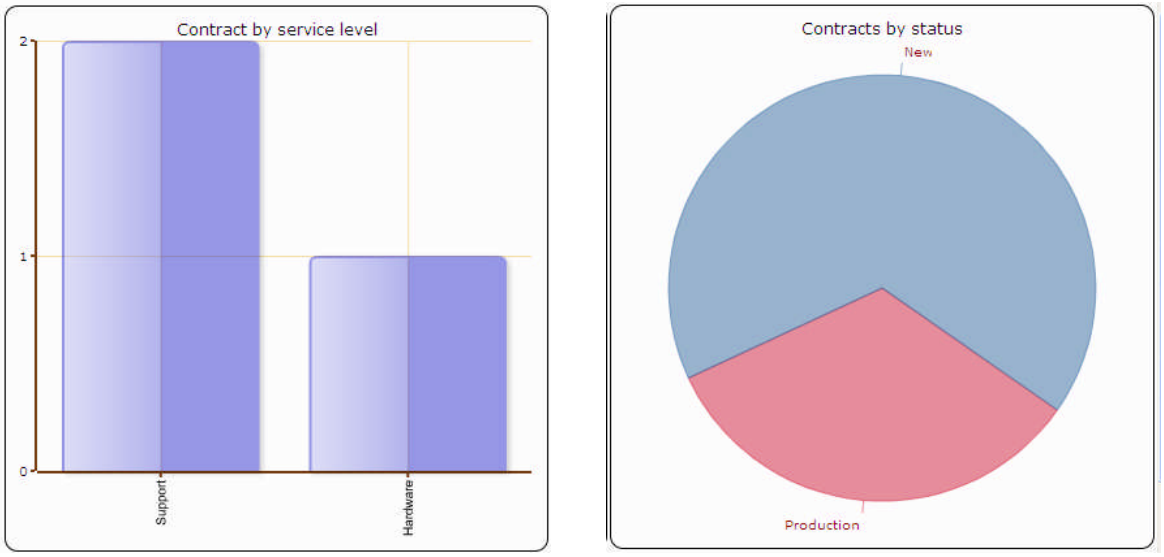


Figure 105

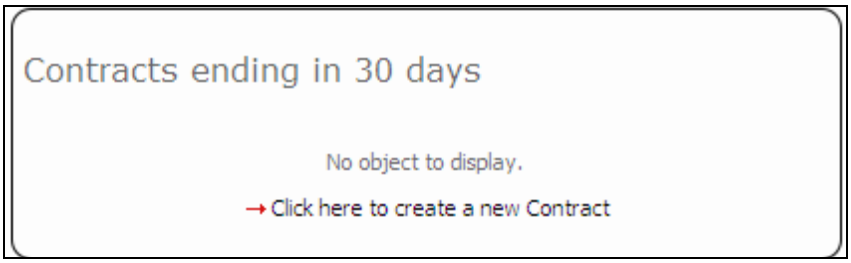


Figure 106

Importing massively data

In order to ease management of CI and their relationships, iTop is providing a massive data load functionality that allows users to create any object using csv and excel files.
This tool can be used for adding or updating objects.

	A	B	C	D	E	F	G	H	I	J	K	
1	name	Mgmt IP	Default Gateway	Status	Business (	Organizati	Location	Brand	Model	OS Family	OS Version	Serial
2	domino.combodo.com		10.22.28.1	In Production	medium	1	2	IBM	Power 520	AIX	4.1	S4523
3	srv10		10.22.28.1	Production Candidate	high	1	2	IBM		AIX	4.1	
4	srv11	10.3.5.4	10.22.28.1	Production Candidate	high	1	2	IBM		AIX	4.1	
5	srv12		10.22.28.1	Production Candidate	high	1	2	IBM		AIX	4.1	
6	srv13	10.22.28.4	10.22.28.1	Production Candidate	high	1	2	IBM		AIX	4.1	
7												

Figure 107

To start massive import, click on “CSV import” menu on the explorer frame. A wizard helps you to massively load you object.

First step consists in selecting object you would like to load, and pasting data from you csv or excel document. First line is used to represent name of the attributes to map those data with. The wizard will automatically find separator.

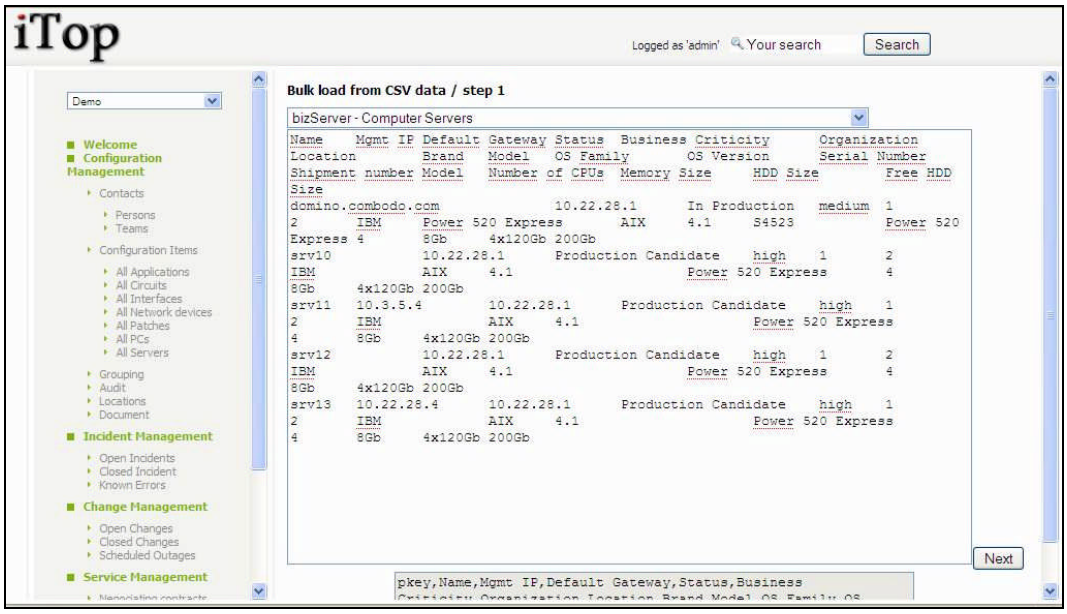


Figure 108

Second step consist in validating field mapping. If header was not good in previous step, this step helps you to define good field value using list. The tool also select automatically primary keys for reconciliation, but you can change it if required.

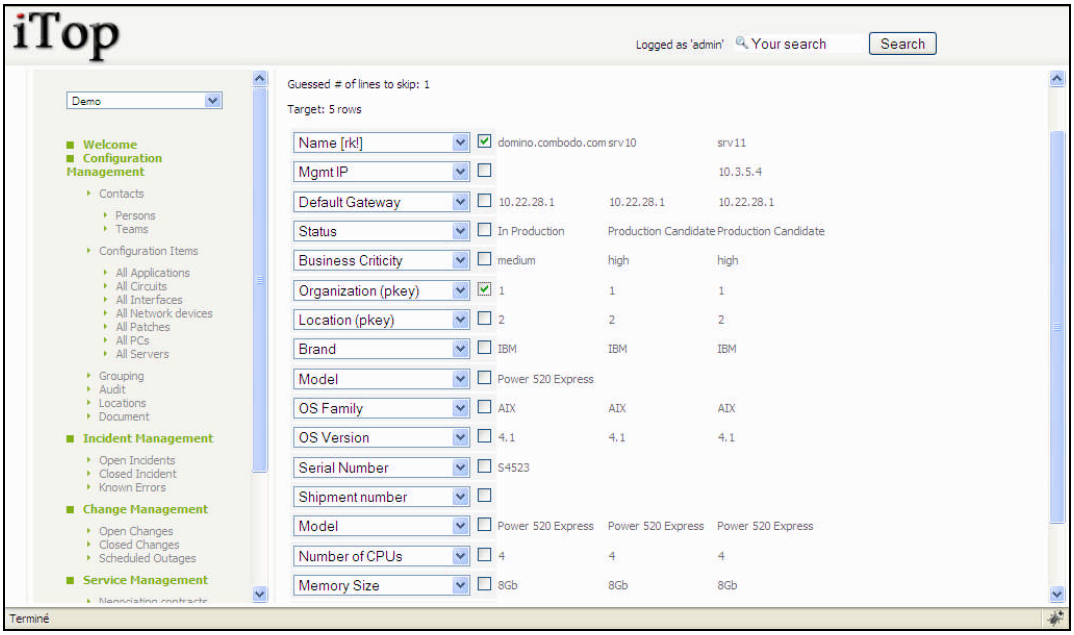


Figure 109

Third step displays result for data analysis. The wizard at this level tells you what we be updated if already stored in database using green color highlight, and what will be created.

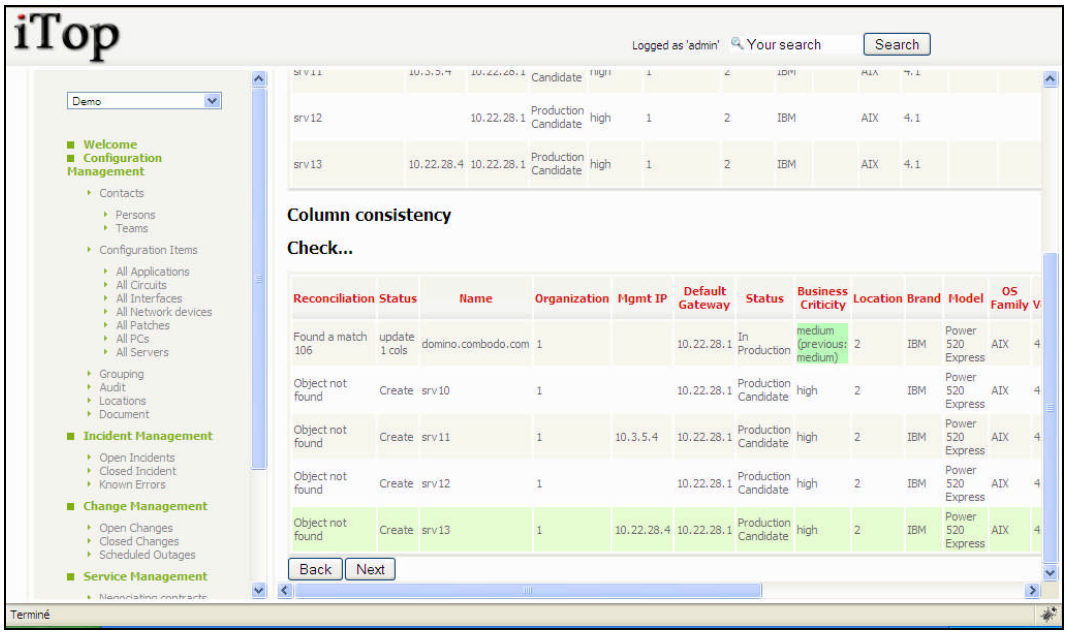


Figure 110

Last step create or update object and summarize what had been done.

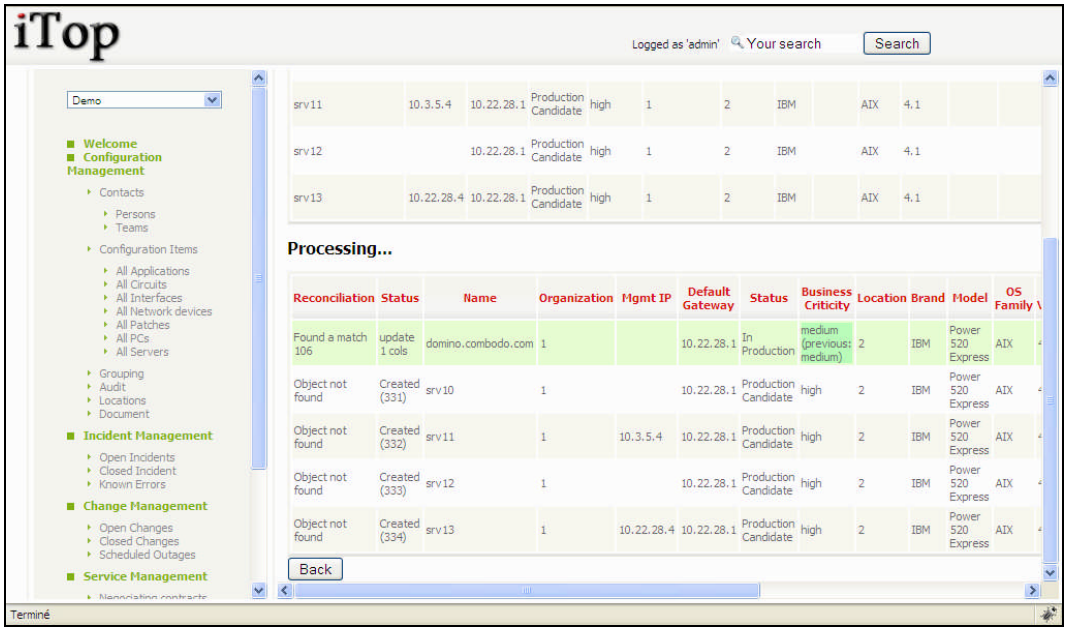


Figure 111