iTop 0.9

User guide



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

Table of content

Table of content	2
About iTop	4
Licensing	4
Changes since 0.8	5
New features	5
Bug fixed	6
Current limitation	6
iTop common usage	6
Starting iTop	6
Using Explorer menu	8
Filtering on a given organization	8
Accessing dashboards	8
Accessing list of items	9
Navigating within iTop	10
Action on list of items	10
Searching a type of object	12
Accessing object details	13
Action on a given item	14
Managing relationships between objects	15
Global search	16
Using direct URL	17
Using CMDB module	17
Managing Contacts	17
Managing person	18
Managing team	21
Managing Workgroups	22
Managing Locations	23
Managing Infrastructures	25
Managing PCs	25
Managing Servers	28
Managing Applications	30
Managing Patches	31
Managing Network Devices	33
Managing Interfaces	35
Managing Circuits	36
Managing Groups	38
Managing Documents	40
Using Audit	41
Using Service Desk module	42
Service call life cycle	43
Viewing Service call	43
Creating Service call	44
Updating Service call	46
Assigning or re-assigning a ticket to workgroup or agent	46

Working on a service call	.47
Resolving a service call	.47
Service call Dashboard	.47
Using Incident management module	. 48
Incident life cycle	. 49
Viewing Incident	. 49
Creating incident	. 50
Updating incident	. 53
Assigning or re-assigning a ticket to workgroup or agent	. 53
Working on an incident ticket	. 53
Closing an incident ticket	. 53
Incident Dashboard	. 54
Using Change management module	. 55
Change life cycle	. 55
Viewing changes	. 55
Creating a new change	. 57
Updating a change	. 59
Validating change	. 59
Planning a change	. 59
Approving a change	. 60
Implementing a change	. 60
Monitoring and closing a change ticket	. 61
Change dashboard	. 61
Using Service management module	. 61
Viewing services provided by an organization	. 62
Creating a new service	. 62
Viewing contract used by a given organization	. 63
Creating new contract	. 64
Updating a contract	. 65
Service management dashboard	. 66
Importing massively data	. 66

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: <u>http://sourceforge.net/apps/trac/itop/report/1</u>. This current release is fixing 11 critical bugs:

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

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

User is prompt to enter his login and password.

Welco	ome to iTop!
lease ident	ify yourself before continuing.
User Name:	
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.



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.

obj	ect(s) displayed out of 204	4 → Display All							Actions
	Name	Status	Business Criticity	Organization	Location	Brand	Model	05 Family	05 Version
l	domino.combodo.com	InProduction	high	→ Demo	→ Paris	IBM	Power 520 Express	AIX	4.1
1	server02	ProductionCandidate	high	→ Demo	→ Paris	IBM		AIX	4.1
l	server03	ProductionCandidate	high	→Demo	→ Paris	IBM		AIX	4.1
1	server04	ProductionCandidate	high	→ Demo	→ Paris	IBM		AIX	4.1
1	server05	ProductionCandidate	high	→ Demo	→ Paris	IBM		AIX	4.1
1	server06	ProductionCandidate	medium	→ Demo	→ Paris	IBM		AIX	4.1
k	server07	ProductionCandidate	high	→ Demo	→ Paris	IBM		AIX	4.1
1	server08	ProductionCandidate	high	→ Demo	→ Paris	IBM		AIX	4.1
k	server09	ProductionCandidate	high	→ Demo	→ Paris	IBM		AIX	4.1
	server 10	BroductionCandidate	, kinh	- + Demo	⇒Paris	TRM		AIX 4 A A	41

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 \rightarrow . 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.

	Actions 🚽
P	eMail
l	CSV Export
	New

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.

Objects of class 'bizServer', 1 - Message (Plain Text)	
Elle Edit View Insert Format Iools Actions Help	
🖂 Send 📕 糸 凸 洗 函 値 📍 🕴 🎔 🗋 Ogtons 🐵 PDF Converter 4.1 🚆 🔷 🔹 📥 三 三 注 詐 詐	A
	_
Subject: Objects of class 'bizServer', 1	
http://localhost:51/pages/ULphp?	100
operation=searonsfilter=imie0zvygmvycmspelnionziogpsCmspelnionziojplakpizkJzzkik(zpNUTO9Ug==tmenu=10	
	X

"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.

#SELECT bizServer AS bizServer WHERE 1	~
id, Name, Mgmt IP, Default Gateway, Status, Severity, Organization Id, Location, Brand, Model, OS Family, OS Version, Serial Number, Shipment number, Model, Number of	
CPUs Memory Size, HDD Size, Free HDD Size	
106.domino.combodo.com.10.22.28.10.10.22.28.1.In Production.high, 1.2.IBM. Power 520 Express.AIX.4.1,S4523, Power 520 Express.4.8Gb.4x120Gb.200Gb	
107, server02, 10, 22, 28, 11, 10, 22, 28, 1, Production Candidate high, 1, 2, IBM, AIX, 4, 1, ,, Power 520 Express, 4, 8Gb, 4x120Gb, 200Gb	
108. server03. 10. 22. 28. 12. 10. 22. 28. 1. Production Candidate high, 1. 2. IBM, AIX.4.1., Power 520 Express. 4. 8Gb, 4x120Gb, 200Gb	
109 server04, 10 22 28, 13, 10, 22, 28, 1, Production Candidate high 1, 2, IBM, AIX 4, 1, Power 520 Express 4, 8Gb, 4x120Gb, 200Gb	
110. server05, 10.22, 28, 14, 10, 22, 28, 1, Production Candidate, high, 1, 2, IBM, AIX, 4, 1, , Power 520 Express, 4, 8Gb, 4x120Gb, 200Gb	
111, server06, 10, 22, 28, 15, 10, 22, 28, 1, Production Candidate, medium, 1, 2, IBM, AIX, 4, 1, , , Power 520 Express 4, 8Gb, 4x120Gb, 200Gb	
112 server07, 10 22 28, 16, 10 22 28, 1 Production Candidate high, 1, 2 IBM, AIX 4, 1, Power 520 Express 4, 8Gb, 4x120Gb, 200Gb	
113 server08 10 22 28 17 10 22 28 1 Production Candidate high 1 2 IBM. AIX 4 1. Power 520 Express 4 8Gb 4x120Gb 200Gb	
114 server09 10 22 28 18 10 22 28 1 Production Candidate high 1 2 IBM AIX 4 1 Power 520 Express 4 8Gb 4x120Gb 200Gb	
115 server10 10 22 28 19 10 22 28 1 Production Candidate high 1 2 IBM AIX 4 1 Power 520 Express 4 8Gb 4x120Gb 200Gb	
116 server100 10 22 28 109 10 22 28 1 Production Candidate high 1 1 HP HP-UX 11 23 m3440 4 8Gb 4x120Gb 200Gb	
117 server101 10 22 28 110 10 22 28 1 Production Candidate high 1 1 HP, HP-UX 11 23, rp3440 4 8Gb 4x120Gb 200Gb	
118 server102 10 22 28 111 10 22 28 1 Production Candidate high 1 1 HP HP-UX 11 23 rp3440 4 8Gb 4x120Gb 200Gb	
119 server103 10 22 28 112 10 22 28 1 Production Candidate high 1 1 HP, HP-UX 11 23, m3440 4 8Gb 4x120Gb 200Gb	
120 server104 10 22 28 113 10 22 28 1 Production Candidate high 1 1 HP, HP-UX 11 23, m3440 4 8Gb 4x120Gb 200Gb	
121 server105 10 22 28 114 10 22 28 1 Production Candidate high 1 1 HP HP-UX 11 23, rp3440 4 8Gb 4x120Gb 200Gb	
122 server106 10 22 28 115 10 22 28 1 Production Candidate high 1 1 HP, HP-UX 11 23, rp3440 4 8Gb 4x120Gb 200Gb	
123 server107 10 22 28 116 10 22 28 1 Production Candidate high 1 1 HP, HP-UX 11 23, m3440 4 8Gb 4x120Gb 200Gb	
124.server108.10.22.28.117.10.22.28.1 Production Candidate high 1.1 HP, HP-UX.11.23, rp3440.4.8Gb.4x120Gb.200Gb	
125 server109 10 22 28 118 10 22 28 1 Production Candidate high 1 1 HP, HP-UX 11 23, rp3440 4 8Gb 4x120Gb 200Gb	
126 server11.10.22.28.20.10.22.28.1 Production Candidate high 1.2 IBM. AIX 4.1., Power 520 Express 4.8Gb.4x120Gb.200Gb	
127 server110.10.22 28.119.10.22 28.1 Production Candidate high 1.1.HP. HP-UX.11.23ro3440.4.8Gb.4x120Gb 200Gb	
128.server111.10.22.28.120.10.22.28.1 Production Candidate high 1.1 HP, HP-UX.11.23, rp3440.4.8Gb.4x120Gb.200Gb	
129.server112.10.22.28.121.10.22.28.1.Production Candidate high 1.1.HP, HP-UX.11.23, rp3440.4.8Gb.4x120Gb.200Gb	
130.server113.10.22 28.122.10.22 28.1 Production Candidate high 1.1 HP, HP-UX 11.23, rp3440.4.8Gb.4x120Gb.200Gb	
131.server114.10.22.28.123.10.22.28.1.Production Candidate high 1.1.HP, HP-UX.11.23, rp3440.4.8Gb.4x120Gb.200Gb	
132 server115 10 22 28 124 10 22 28 1 Production Candidate high 1 1 HP, HP-UX 11 23, rp3440 4 8Gb 4x120Gb 200Gb	
133 server116 10 22 28 125 10 22 28 1 Production Candidate high 1 1 HP, HP-UX 11 23, rp3440 4 8Gb 4x120Gb 200Gb	
134 server117.10.22 28.126.10.22 28.1 Production Candidate high 1.1.HP, HP-UX.11.23., rp3440.4.8Gb,4x120Gb,200Gb	
135 server118.10.22 28.127.10.22 28.1 Production Candidate high 1.1.HP, HP-UX.11.23ro3440.4.8Gb.4x120Gb 200Gb	
136.server119.10.22.28.128.10.22.28.1.Production Candidate high 1.1.HP, HP-UX.11.23, rp3440.4.8Gb.4x120Gb.200Gb	
137 server12 10 22 28 21 10 22 28 1 Production Candidate high 1 2 IBM. AIX 4 1, Power 520 Express 4 8Gb 4x120Gb 200Gb	
138 server120.10.22.28.129.10.22.28.1 Production Candidate high 1.1.HP. HP-UX.11.23ro3440.4.8Gb.4x120Gb.200Gb	~

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.

op				Logge	d as 'admin' 🔍	Your search	Search	
Al Organ Create a new menu item fo	or: Objects of class "bizServer"	, 1						
Menu Label:								
Weic Confi Description:								
Manage Description								
Insert after: My Bookn	narks 🚩							on
Create as a child men	u item							0S rsi
Ok Cancel								
• Willinterfaces	gra pervierto2	Considerte	high	-+ Demo	-+ Paris	1814	AIX	4.1
	p server03			-+ Demo	-+ Paris			
	gervert64			-+ Demo	-+ Paris			4.1
	🕅 server05			-+ Demo	-+ Paris			
Incident Hanagement	🛱 serveros			-+ Demo	→ Paris			-4.1
	Derver07			-+ Demo	-+ Paris			
Known Errors Known Hanapement	💯 server08			-+ Demo	→ Paris			
	pa server09			-+ Demo	-+ Paris			
	Deerver 10			-+ Demo	-+ Paris			

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

	ame:	Status:	* Any *		Y Severity	/= * An	iy * 💌 🛛 Bra	and:	
M	odel:	OS Famil	Υ ²		Location	n: * An	iy* 💌		Searc
				Search					
				All Ser	vers				
034	obiect(s)								
									Actions
	Name	Status	Severity	Organization Id	Location	Brand	Model	05 Family	OS Version
	Name domino.combodo.com	Status In Production	Severity high	Organization Id → Demo	Location → Paris	Brand IBM	Model Power 520 Express	OS Family AIX	OS Version 4.1
	Name domino.combodo.com server02	Status In Production Production Candidate	Severity high	Organization Id → Demo → Demo	Location →Paris	Brand IBM IBM	Model Power 520 Express	OS Family AIX AIX	Actions 05 Version 4.1 4.1
	Name domino.combodo.com server02 server03	Status In Production Candidate Production Candidate	Severity high high high	Organization Id → Demo → Demo	Location → Paris → Paris → Paris	Brand IBM IBM	Model Power 520 Express	OS Family AIX AIX AIX	Actions 05 Version 4.1 4.1 4.1
	Name domino.combodo.com server02 server03 server04	Status In Production Candidate Production Candidate Production Candidate	Severity high high high high	Organization Id → Demo → Demo → Demo	Location → Paris → Paris → Paris → Paris	Brand IBM IBM IBM	Model Power 520 Express	OS Family AIX AIX AIX AIX	Actions 05 Version 4.1 4.1 4.1 4.1
	Name domino.combodo.com server02 server03 server04 server05	Status In Production Candidate Production Candidate Production Candidate	Severity high high high high high high	Organization Id → Demo → Demo → Demo → Demo	Location → Paris → Paris → Paris → Paris → Paris	Brand IBM IBM IBM IBM	Model Power 520 Express	OS Family AIX AIX AIX AIX AIX	Actions 05 Version 4.1 4.1 4.1 4.1 4.1 4.1
	Name domino.combodo.com server02 server03 server04 server05 server06	Status In Production Production Candidate Production Candidate Production Candidate Production Candidate	Severity high high high high high high medium	Organization Id → Demo → Demo → Demo → Demo → Demo	Location → Paris → Paris → Paris → Paris → Paris → Paris	Brand IBM IBM IBM IBM IBM	Model Power 520 Express	OS Family AIX AIX AIX AIX AIX AIX	Actions 05 Version 4.1 4.1 4.1 4.1 4.1 4.1 4.1 4.1

"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 \overline{P} 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 \rightarrow 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.

 Last modified on 2009-09-19 09:5 	6:47 by admin.	
Date	User	Changes
2009-09-19 09:56:47	admin	Default Gateway set too (previous value: 10.25.3.1)
2009-09-19 09:56:18	admin	• 10.2.22.1 appended to Mgmt IP
2009-09-19 09:55:23	admin	Type set too router (previous value: switch)
2009-09-16 11:54:09	Initialization	Object created

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 Actions 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.

Search	for Inf	ira Objects			Simple Search OQL Query
Name:	rout	Status:	Saarah		
			Search		
			Search		
		Class	Name	Status	Organization
	,	bizNetworkDevice	router01	production	→ Demo
V	ş	bizNetworkDevice	router02	production	→ Demo
	DOM:	kinhis kunsul Danitas	reviter03	production	Demo

Figure 20

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

Impact	Class	Name	Status	Organization
Order web site is no more working	bizServer	domino.combodo.com	In Production	→ Demo
network equipment down	bizNetworkDevice	router02	production	→ Demo
device not reachable	bizNetworkDevice	router03	production	→ Demo



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

Use 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 Vour 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 ...

VΡ						Log	ged as 'admin'	🤍 paris		Search	
-	~	27	na na oo	Candidate	1999	· Denio				111.5675	****
All Organizations		, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	erver84	Production Candidate	high	→ Demo	→ Paris	HP		HP-UX	11.11
Welcome		,D	rv01.combodo.com	Production Candidate	high	→ Demo	→ Paris	IBM		AIX	4.1
Configuration Management		Ţ	rv02.combodo.com	Production Candidate	high	→ Demo	→ Paris	HP		HP UX	11,23
Contacts			rv03.combodo.com	Production	high	→ Demo	→ Paris	IBM		AIX	4.1
 Persons Teams 		P	srv04.combodo.com	Production	high	→ Demo	→ Paris	HP		HP UX	11,23
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			Name	productio	Status	Gieco	6500	dei	Type	10 25 3 45	mt IP
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			router01	productio	Status	Cisco	6500	del	iype	10.25.3.45	mt IP
All Servers Grouping											
All Servers Grouping Audit Locations		Ģ	router02	productio	n	Cisco	6500	8	switch	10.25.3.46	
All Servers Grouping Audit Locations Document			router02 router03	productio productio	n	Cisco	6500	5	switch switch	10.25.3.46	
All Servers Grouping Audit Locations Document Incident Management Coops Incidents			router02 router03 switch01	productio productio productio	n n	Cisco Cisco	6500	1	switch switch switch	10.25.3.46 10.25.3.47	
All Servers Grouping Audit Locations Document Incident Management Open Incidents Closed Incident Known Errors	_		router02 router03 switch01	productio productio productio	in in	Cisco Cisco	6500	3	switch switch switch	10.25.3.46 10.25.3.47	
All Servers Grouping Audit Locations Locations Document Incident Management Open Incidents Closed Incident Known Errors Change Management))) Incid	router02 router03 switch01 ent: 1 object(s	productio productio productio) found.	n n n	Cisco	6500	3	switch switch switch	10.25.3.46 10.25.3.47	
All Servers Grouping Audit Locations Document Incident Management Open Incidents Closed Incident Known Errors Change Management Open Changes		Incide	router02 router03 switch01 ent: 1 object(s	productio productio productio	חי וח וח	Cisco Cisco	6500	1	switch switch	10.25.3.46 10.25.3.47	Actions
All Servers Grouping Audit Locations Document Depen Incidents Closed Incident Known Errors Change Management Change Changes Closed Changes Scheduled Outages		J J Incid	router02 router03 switch01 ent: 1 object(s ct(s) TicketID Ti	productio productio productio) found.	in in in :r Type	Cisco Cisco Status	6500 6500	Star	switch switch switch	10.25.3.46 10.25.3.47 Initia	Action

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:

ор						Logged as 'admin'	KYour search	Search
All Organizations	^	Contact	ts Ove	erview				0
Welcome Configuration Management Contacts		Contacts b	у Туре	Contacts by L	ocation	ï		
Persons		Class	Count	Location Name	Count			
Configuration Thomas		bizTeam	→ 2	Grenoble	→ 2			
Configuration Litems		bizPerson	→ 3	Paris	→ 3			
All Network devices All Network devices All Patches All PCs All PCs		Contacts b	y statu:	5				
Grouping		implementation	-+ 1					
Audit Locations Document		production	→ 4					
Incident Management								
Open Incidents Closed Incident Known Errors	-							
Change Management								
Open Changes Closed Changes Scheduled Outages								
Service Management								
	~							

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.

ор					Lo	gged as 'admin' 🔍 Your search	Search	
All Organizations	-					Search		
. Welcome	3	object(s)						Action
Configuration		first Name	Name	Status	Organization Id	eMail	Location Id	Phone
Management	5	Dumas	Dumas	production	→ Demo	alexandre.dumas@gmail.com	→ Paris	
Persons	Ţ	D Victor	Hugo	production	→ Demo	victor.hugo@gmail.com	→ Paris	33172382223
• Teams	Ţ	D Jules	Verne	production	→ Demo	jules, verne@gmail.com	-+ Grenoble	
All PCs All Servers Grouping Audit Locations Document Incident Management Copen Incidents Closed Incident Known Errors								
Change Management								
Open Changes Closed Changes Scheduled Outages								
Service Management	1200							
	V							

Figure 21

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

ор				Logged as 'admin'	Your search	Search
All Organizations	^			Search		
 Welcome Configuration Management 	Person: Hugo Last modified of	on 2009-08-04 11:1	1:44 by Initialization.			
 Contacts 	first Name	Victor				
Persons	Name	Hugo				
Teams	Status	production				
 Configuration Items 	Organization Id	I → Demo				
All Applications	eMail	victor.hugo@gm	ail.com			
All Interfaces	Location Id	→ Paris				
All Network devices All Patches	Phone	33172382223				
All PCs	Employe Numb	er e12345				
 All Servers 	Teams	Infrastructure	Documents			
Grouping Audit Locations	1 object(s)					Action
Document		Contact	Phone	eMail	object	Role
Incident Management	J → ITOP	admin team	33123453612	combodo@gmail.com	→ Hugo	business model expert
Closed Incident						
 Known Errors 						
Change Management						
Change Management Open Changes Closed Changes Scheduled Outages						
Change Management Open Changes Chaded Changes Scheduled Outages Service Management						

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:

-	~	
All Organizations	Creation of a	new Person
Welcome	Name	
Configuration Management	Status	implementation
Contacts	Organization Id	Demo 💌
Persons	eMail	
• Teams	Phone	
Configuration Items	Location Id	Grenoble 👻
All Circuits	first Name	
All Interfaces All Network devices	Employe Numbe	er
All Patches		ExcBack Novtax Finish
All Pics All Servers		
Grouping		
Locations		
 Document 		
Incident Management		
 Open Incidents Closed Incident 		
Known Errors		
Change Management		
 Onen Changes 		
Classed Changes		

Figure 23

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

op			Logged as 'admin' 🤍 Your sea	Irch Search
All Organizations	Creation of a	new Person		
Welcome Configuration	Final step: confirmat	āon		
Management	first Name	Do		
Contacts	Name	Jhon		
Persons	Status	implementation		
Fredits	Organization Id	→ Demo		
Configuration Items	eMail	jd@combodo.com		
All Applications All Circuits	Location Id	→ Grenoble		
All Interfaces All Network devices	Phone	+3245678909		
All Patches	Employe Number	r 0045356		
All PCs All Servers	Create bizPers	son		
Grouping				
Locations				
Document				
Incident Management				
Open Incidents Open Incidents				
Known Errors				
Change Management				
Open Changes Closed Changes				
 Scheduled Outages 				
Service Management				

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:

ор		Logged as 'admin'	Q Your search Search	
All Organizations	Jhon - bizPers	on modification		
1	Name	Jhon		
Welcome	Status	implementation		
Configuration Management	Organization Id	Demo 🛩		
Contacts	eMail	jd@combodo.com		
Persons	Phone	3245678909		
 Teams Configuration Items 	Location Id	Grenoble 💌		
All Applications	first Name	Do		
All Circuits All Interfaces All Interfaces All Network devices All Patches All PCs All Servers	Employe Numbe	т [45356 Арріу]	
Grouping Audit Locations Document				
Incident Management				
Open Incidents Closed Incident Known Errors				
Change Management				
Open Changes Closed Changes Scheduled Outages				
Service Management				
	Y			

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.

op				Logg	ged as 'admin' 🤍 Your search	Search]
Demo	î				Search		
-	2.ob	oject(s)					Actions
Configuration Management		Name	Status	Organization Id	eMail	Location Id	Phone
 Contacts 	, D	Application support	implementation	→ Demo	application@mecanorama.com	→ Grenoble	33456456788
Persons Teams	50	ITOP admin team	production	→ Demo	combodo@gmail.com	→ Paris	33123453612
Configuration Items							
 All Circuits All Interfaces All Network devices All Patches All PCs All Servers 							
Grouping Audit Locations Document							
Incident Management							
Open Incidents Closed Incident Known Errors							
Change Management							
Open Changes Closed Changes Scheduled Outages							
Service Management							

Figure 26

When you click on $\overline{\mathbb{P}}$ button you get details for selected team.

Гор				Logged in as 'a	dmin' (Administrator) Log off Q Your search	Search
All Organizations	^			Search		
 Welcome Configuration Management 	Team: ITC	P admin team ified on 2010-01-17 12:41:59 by	/ Initialization.			Action
Contacts Persons Tooms	Name Status	ITOP admin team				
Configuration Items	Organizati	on →Demo				
 All Applications 	eMail	combodo@gmail.com				
All Circuits	Location	→ Paris				
All Interfaces All Network devices	Phone	33123453612				
All Patches	Membe	rs Infrastructures	Workgroups Docum	nents		
All PCs All Servers All Subnets	2 object(s)				Actions +
Grouping Audit		Role	Contact	Phone	eMail	
Locations	5	agent	→ Verne		jules.verne@gmail.com	
Service Desk	5 2	team leader	→ Hugo	33172382223	erwan.taloc@gmail.com	
 My Service calls Open Service calls 						
Incident Management						
My Incidents Open Incidents Closed Incident Known Errors						
Change Management	~					

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 $(1^{st} \text{ level}, 2^{nd} \text{ level} \dots)$.

"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:

	f a new Workgroup	Creation of
	-	Name
	implementation	Status
	Demo 👻	Organization
	Test 👻	Team
	1st level support	Role
< Bar	select one 1st level support	
	2nd level support 3rd level support	
<< Bat	select one 1st level support 2nd level support 3rd level support	

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 $\overline{\mathbb{P}}$ button you get details for selected location.

op					Logged as	'admin' 🤽 Your search	Search	
Demo 💌	^				Seard	h		
 Welcome Configuration Management 	Loca	ation: Grer	n 2009-08-04 11:11:-	14 by Initialization.				Act
Contacts	Nam	e	Grenoble				5	
Persons Teams	Stat	us anization Id	production → Demo					
 Configuration Items 	Add	ress	5 Avenue de la Posta					The second
All Applications All Circuits All Interfaces	Cou	ntry ent Location	France → Paris					
All Network devices All Patches All Patches All PCs All Servers	∫ C 20	ontacts	Servers PC	s Network	_Devices Do	ocuments		Actions
Grouping		Class	Name	Status	Organization Id	eMail	Location Id	Phone
Locations	5	bizTeam	Application support	implementation	Demo	application@mecanorama.com	-+ Grenoble	3345645678
Incident Management	9	bizPerson	Verne	production	→ Demo	jules.verne@gmail.com	→ Grenoble	
Open Incidents Closed Incident Known Errors								
Change Management								
Open Changes Closed Changes Scheduled Outages								

"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:

υp	Logged as	'admin' 🧠 Your search Search
Demo	Creation of a new Location	
Welcome	Name	
Configuration Management	Status implementation	
Contacts	Organization Id Demo 🐱	
Persons Teams	Severity low	
 Configuration Items 		
All Applications All Circuits All Circuits All Interfaces All Network devices All Patches All PCs All Servers	Address	
Grouping Audit	22113	
Locations	Country	
Jocument Incident Management	Parent Location Grenoble 🗙	
Open Incidents Closed Incident Known Errors	<< Back Nex	t>> Finish
Change Management		
Open Changes Closed Changes Scheduled Outages		
Service Management		

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.

ор		Logged as 'admin' 🧠 Your search Search							
All Organizations	^				S	earch			
Welcome Configuration Management					All	PCs			
Contacts	98 0	biact(c)							Actions
Persons Teams		Name	Status	Severity	Organization Id	Location	Brand	Model	Туре
Configuration Items	50	PC01	production	high	→ Demo	→ Paris	Compag	nc6005	desktop PC
All Applications	- 10	PC02	production	high	-+ Demo	→ Paris	Compag	nc6000	desktop PC
All Interfaces	ja	PC03	production	high	→ Demo	→ Paris	Compag	nc6000	desktop PC
All Patches	p	PC04	production	high	Demo	→ Paris	Compag	nc6000	desktop PC
All PCs All Servers	, D	PC05	production	high	→ Demo	→ Paris	Compaq	nc6000	desktop PC
Grouping	JO	PC06	production	high	-+ Demo	→ Paris	Compag	nc6000	desktop PC
Locations	p	PC07	production	high	→ Demo	→ Paris	Compaq	nc6000	desktop PC
Document Incident Management	ja	PC08	production	high	→ Demo	→ Paris	Compag	nc6000	desktop PC
Open Incidents	ja	PC09	production	high	→ Demo	→ Paris	Compaq	nc6000	desktop PC
Closed Incident Known Errors	J	PC10	production	high	Demo	→ Paris	Compag	nc6000	desktop PC
Change Management	1	PC11	production	high	→ Demo	→ Paris	Compaq	nc6000	desktop PC
Open Changes	ja	PC12	production	high	→ Demo	→ Paris	Compag	nc6008	desktop PC
 Closed Changes Scheduled Outages 	JD.	PC13	production	high	→ Demo	→ Paris	Compaq	nc6000	desktop PC
Service Management	JO	PC14	production	high	Demo	-+ Paris	Compag	nc6000	desktop PC
Nanncisting contracte	Y		•	1014	-	1411			

Figure 32

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

ор					Logged as 'adm	in' 🔍 Your s	search (Search
All Organizations	^	PC: PC01 Last modified of	on 2009-08-0 <mark>4</mark> 11:11:44 by	Initialization.				Actio
Welcome Configuration		Name	PC01					
Management		Status	production					
 Contacts 		Severity	high					
Persons		Organization Id	I → Demo					
Teams		Location	→ Paris					
Configuration Items		Brand	Compaq					
 All Applications 		Model	nc6005					
All Interfaces		OS Family	Windows					
 All Network devices All Retrieves 		OS Version	XP					
All PCs		Mgmt IP	10.22.32.14					
 All Servers 		Default Gatewa	y 10.22.31.1					
Grouping Audit		Shipment num	ber					
Locations		Serial Number						
 Document 		Туре	desktop PC					
Incident Management		CPU	Celeron 2x 1.6Ghz					
Open Incidents Closed Incident	-	Memory Size	2048					
 Known Errors 		HDD Size	60Gb					
Change Management Open Changes Closed Changes Scheduled Outages		Installed_A	pplication Installe	ed_Patches	Contacts 1	Interfaces	Incidents	Documents Actions
Service Management			Name		Hosting device		Version	Function
Name of Street and Streets	~	TOTAL COLOR	and Office	2223				and down

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:

lame		
Status	implementation	
Organization Id	Demo 💌	
Severity	low 💌	
Location	Grenoble 😒	
Brand		
Model		
Serial Number		
Туре	desktop PC 👻	
Memory Size		
CPU		
HDD Size		
05 Family		
05 Version		
Shipment number		
Mgmt IP		
Default Gateway		

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 **Actions** -> "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 **Actions** -> "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 **Actions** -> "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.

ор						Logged as	'admin' 🔍 '	Yours	earch	Search	
All Organizations	^					Search					
 Welcome Configuration Management 						All Ser	vers				
Contacts		203 o	object(s)							1	Actions
Teams			Name	Status	Severity	Organization Id	Location	Brand	Model	05 Family	05 Version
Configuration Items All Applications		50	domino.combodo.com	In Production	high	-+ Demo	→ Paris	IBM	Power 520 Express	AIX	4,1
All Circuits All Interfaces All Network devices		,jo	server02	Production Candidate	high	→ Demo	→ Paris	IBM		AIX	4,1
 All Patches All PCs 		Ţ	server03	Production Candidate	high	-+ Demo	→ Paris	IBM		AIX	4,1
All Servers Grouping		5	server04	Production Candidate	high	Demo	→ Paris	IBM		AIX	4.1
Audit Locations		Ţ	server05	Production Candidate	high	-+ Demo	→ Paris	IBM		AIX	4,1
Incident Management		,	server06	Production Candidate	medium	> Demo	→ Paris	IBM		AIX	4.1
Open Incidents Closed Incident		5	server07	Production Candidate	high	-+ Demo	→ Paris	IBM		AIX	4,1
Known Errors Change Management		, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	server08	Production Candidate	high	→ Demo	→ Paris	IBM		AIX	4.1
Open Changes Closed Changes		Ģ	server09	Production Candidate	high	→ Demo	→ Paris	IBM		AIX	4,1
Scheduled Outages Service Management		Ģ	server10	Production Candidate	high	→ Demo	→ Paris	IBM		AIX	4,1
Nenscisting contracte	~		eerver 100	Production	hish	-+ Damo	-+ Grannbla	нр		HEJIN	11.72

Figure 35

When you click on \overline{P} button you get details for selected server.

ор			Logged as 'admin'	K Your search	Search
All Organizations	Server: domino	.combodo.com			Actio
	Last modified on	2009-08-04 11:11:44 by Initializati	on.		
Welcome Configuration	Name	domino.combodo.com			
Management	Mgmt IP	10.22.28.10			
Contacts	Default Gateway	10.22.28.1			
Persons	Status	Production			
 Teams 	Severity	high			
 Configuration Items 	Organization Id	→ Demo			
All Applications	Location	→ Paris			
All Interfaces	Brand	IBM			
All Network devices All Patches	Model	Power 520 Express			
All PCs	OS Family	AIX			
 All Servers 	05 Version	4.1			
Grouping Audit	Serial Number	S4523			
Locations	Shipment number	r			
Document	Model	Power 520 Express			
Incident Management	Number of CPUs	4			
Open Incidents Closed Incident	Memory Size	8Gb			
 Known Errors 	HDD Size	4x120Gb			
Change Management	Free HDD Size	200Gb			
Open Changes Closed Changes Scheduled Outages	Applications	Patches Interfaces	Contacts Inciden	its Changes Do	ocuments
Service Management	2 object(s)				Actions
Nanncisting contracte	*	Name	Hosting device	Version	Function

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.

op	Logged as 'admin' 🔍 Your search Search
All Organizations	Search
	Application: Outlook server
Welcome Configuration Management	Last modified on 2009-08-04 11:11:44 by Initialization.
Contacts	Name Outlook server
Persons	Hosting device → domino.combodo.com
Teams	Organization Id → Demo
 Configuration Items 	Status implementation
 All Applications 	Installed date 2008-12-20 00:00:00
All Circuits All Interfaces	Version 8.1
All Network devices	Function Mail Server
All Patones All PCs All Servers	Impacted_Client_Application Application_Server Contracts
Grouping	No object to display.
Locations Document	Click here to create a new ClientServerLinks
Incident Management	
Open Incidents Closed Incident Known Errors	
Change Management	
Open Changes Closed Changes Scheduled Outages	
Service Management	
 Nannhistinn contracte 	

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.

ор				Logge	ed as ' <mark>admin'</mark> 🔍 Your s	search Search
All Organizations	^			s	earch	
 Welcome Configuration Management 				All P	atches	
 Contacts 		object	t(c)			Action
Persons Teams		objec	Name	Device	Туре	Installed date
Configuration Items	1	0	PHSS 3452	→ domino.combodo.com	OS	2009-08-07 00:00:00
All Interfaces All Nethork devices All Patches All Patches All Pacs All Servers Grouping Audit Locations Document						
Incident Management						
Open Incidents Closed Incident Known Errors						
Change Management						
Open Changes Closed Changes Scheduled Outages						
Service Management						
	Y					

When you click on \overline{P} button you get details for selected patch.

op			Logged as 'admin' 🤗 You	r search Search
All Organizations	^		Search	
 Welcome Configuration Management 	Patch: + Last	: PHSS 3452 modified on 2009-08-07 12:40:08 by admin.		Act
Contacts	Name	PHSS 3452		98
Persons	Device			
 Teams 	Install	ed date 2009-08-07 00:00:00		
 Configuration Items 	Туре	OS		
 All Circuits All Interfaces All Network devices All Patches All PCs All Servers 	Descri	TON TX library issues		
Grouping Audit Locations Document				
Incident Management				
Open Incidents Closed Incident Known Errors	-			
Change Management				
Open Changes Closed Changes Scheduled Outages				
Service Management	1.00			
Mannelstine contracte	×			

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:

Name				
Status	implementation			
Organization Id	Demo 💌		et.	
Device				
Installed date				
Description				
Туре	OS 💌			
		<< Back	Next >> Finish	

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.

ор				Logged as 'admin'	Your set	arch	Search	
All Organizations	^			Search				
Welcome Configuration Management				All Network De	evices			
Contacts	5	object((s)					Actions
Persons Teams			Name	Status	Brand	Model	Туре	Mgmt IP
 Configuration Items 	1	, D	greectobench01.grenoble.hp.com	implementation			switch	16.16.2.45
 All Applications All Circuits 	= 1	, Г	outer01	production	Cisco	6500	switch	
All Interfaces	1	jo r	outer02	production	Cisco	6500	switch	
All Patches	1	, D	outer03	production	HP	6500	switch	
All PCs All Servers	1	ja s	witch01	production			switch	
Grouping Audit Locations Document								
Incident Management								
Open Incidents Closed Incident Known Errors	_							
Change Management								
Open Changes Closed Changes Scheduled Outages								
Service Management	~							

Figure 42

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

ор				Logged in a	s 'admin' (Administrator)	og off 🤍 Your search	Search
All Organizations	^			Search			
	Network Device: r	outer01					Action
Welcome Configuration Management	 Last modified on 200 	9-09-19 09:56:47 by adm	in.				\bigcirc
Contacts	Name	router01					
Persons	Status	production					
Teams	Business Criticity	high					
 Configuration Items 	Organization	-+ Demo					
 All Applications 	Location	→ Paris					R
All Circuits All Interfaces	Brand	Cisco					
 All Network devices 	Model	6500					
 All Patches All PCs 	Туре	router					
All Servers	Mgmt IP	10.2.22.1					
All Subnets	Default Gateway						
Audit	Serial Number	S2345985					
Locations	105 version	8.2					
- Document	Memory	flash :1=16.48MB					
Service Desk	SNMP Community (Re	ad) public					
Open Service calls	SNMP Community (W	rite) private					
Incident Management	Interfaces C	ontacts Incident	ts Changes	Groups Documents			
 My Incidents 							
Open Incidents	1 object(s)						Actions +
Known Errors			Etatur	Organization	Davica	Pusiness Culti	-it-i

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

Name	swithc01			
Status	implementation	าร		
Organization	Demo 💌			
Business Criticity	low 💌			
Location	Grenoble 🚩			
Brand	Cisco			
Model				
Serial Number				
Mgmt IP	10.2.3.4			
Туре	switch	~		
Default Gateway				
IOS version				
Memory				
SNMP Community (Read)				
SNMP Community (Write)				

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.

ор				Logge	ed as 'admin' 🔍 Your search	Search			
All Organizations	^			5	earch				
 Welcome Configuration Management 		All Interfaces							
Contacts	3 ol	oject(s)				Action			
Persons Teams		Name	Status	Organization	Device	Business Criticity			
Configuration Items	F	ethernet0/1	implementation	→ Demo	→ switch01	low			
All Applications All Circuits	- F	ethernet0/1	production	→ Demo	→ router01	low			
All Interfaces All Network devices	P	ethernet0/2	implementation	→ Demo	→ domino.combodo.com	low			
All Patches All PCs All Servers									
► Grouping									
Locations Document									
Incident Management									
Open Incidents Closed Incident Known Errors									
Change Management									
Open Changes Closed Changes Scheduled Outages									
Service Management									
Nanssisting contracte	*								

Figure 45

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

op			Logged in as 'admin' (Administrator)	Your search Search
All Organizations	^		Search	
	Interface: ether	net0/1		Acti
Welcome Configuration Management	Last modified on 20	009-09-18 23:20:45 by admin.		
Contacts	Name	ethernet0/1		62
 Persons 	Status	implementation		
Teams	Organization	→ Demo		
 Configuration Items 	Device	→ router01		
 All Applications 	Device location	→ Paris		
 All Circuits All Interfaces 	Business Criticity	low		
 All Network devices 	Logical type	port		
 All Patches All PCs 	Physical type	ethernet		
All Servers All Subpote	IP address	15.128.3.2		
Converses	Subnet Mask			
Audit	MAC address			
Locations	Speed (Kb/s)			
Founded Dock	Duplex	unknown		
Service Desk	Connected interfac	e		
Open Service calls	Connected device			
Incident Management	Groups			
My Incidents Open Incidents Closed Incident Known Errors	No Infra Group to dis	play.		

"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:

op			Logged in as 'admin' (Administrator) Log off Q. Your search Search
All Organizations	Modification of In	erface: ethernet0/1	
Welcome	Name	ethernet0/1	
Configuration	Status	implementation	
- Contacts	Organization	Demo 🔽	
Persons	Business Criticity	low 💌	
 Teams 	Device	router01	
 Configuration Items 	Logical type	port 🗸	
All Applications	Physical type	ethernet 💌	
All Interfaces	IP address	15.128.3.2	
 All Network devices All Patches 	Subnet Mask		
All PCs All Services	MAC address		
All Subnets	Speed (Kb/s)		
Grouping	Dupley	unknown	
Locations Document	Connected interfac	e select one 💙	
Service Desk	Cancel Ap	ply	
 My Service calls Open Service calls 			
Incident Management			
My Incidents Open Incidents Closed Incident Known Errors			

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.

op					Logged in as 'admin' (Administrato	r) Log off 🔍 Your search	Search
All Organizations					Search		
 Welcome Configuration Management 				All	Circuits		
Contacts	1 obj	ject(s)					Actions
Teams		Name	Status	Organization	Carrier ID	Carrier reference	speed
 Configuration Items 		Paris-Grenoble	implementation	-+ Demo	→ France Telecom	FT-2345	
Al Patches Al Patches Al Servers Al Servers Al Subnets Grouping Auldt Locations Document							
Service Desk							
 My Service calls Open Service calls 							
Incident Management							
My Incidents Open Incidents Closed Incident Known Errors							
Change Management							

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

'op			Logged in as 'admin' (Administrator) Log off (, Your search Search
All Organizations	^		Search
Welcome Configuration Management	Circuit: Pari	s-Grenoble d on 2009-09-23 21:11:56 by admin.	Adt
Contacts	Name	Paris-Grenoble	
Persons	Status	implementation	
 Teams 	Organization	→ Demo	
 Configuration Items 	speed		
 All Applications 	Location 1	→ Paris	
All Circuits All Interfaces	Interface 1	→ ethernet0/1	
 All Network devices All Patches 	Device 1	router01	
 All PCs 	Location 2	→ Grenoble	
 All Servers All Subnets 	Interface 2	→ ethernet0/2	
Grouping	Interface	router02	
► Audit	Carrier ID	→ France Telecom	
 Locations Document 	Carrier refer	ence FT-2345	
Service Desk			
 My Service calls Open Service calls 			
Incident Management			
My Incidents Open Incidents Closed Incident Known Errors			
Change Management	~		

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:

op			Logged in as 'admin' (Administrator) Log off Q. Your search Search
All Organizations	Creation of a i	new Circuit	
Welcome	Name		
Configuration	Status	implementation	
Contacts	Organization	select one 💌	
Persons	Business Criticity	low 💌	
Teams	speed		
 Configuration Items 	Location 1	select one 💌	
All Applications All Circuits	Location 2	select one 💌	
All Interfaces All Notwork devices	Interface 1	select one 💌	
All Network devices All Patches	Interface 2	select one 💌	
All PCs All Servers	Carrier ID	select one 🗸 🗸	
 All Subnets 	Carrier reference		
Grouping Audit			< <back next="">> Finish</back>
Locations			
Service Desk			
 My Service calls Open Service calls 			
Incident Management			
My Incidents Open Incidents Closed Incident Known Errors			
- Channe Management			

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.

ор				Logged as 'admin' 🔍	. Your search	Search
All Organizations	-			Search		
Welcome Configuration Management				All Groups		
Contacts	2 obje	ect(s)				Acti
Persons Teams		Name	Status	Organization	Туре	Description
 Configuration Items 		Group of application	production	-+ Demo	list	
All Applications All Circuits		Nagios server	production	→ Demo	Monitoring	Nagios monitoring
All Network devices All Patches All PCs All PCs All Servers Grouping Audit Locations Document						
Incident Management						
Open Incidents Closed Incident Known Errors						
Change Management						
 Open Changes Closed Changes Scheduled Outages 						
Service Management						
Manoristion contracte	*					

Figure 51

When you click on \overline{P} button you get details for selected group.

ор			Logged	das 'admin' 🤍 Yours	earch Search
All Organizations	^		Se	earch	
	Infra	Group: Nagios server			Ac
Configuration Management	+ Las	1 modified on 2009-09-06 16:04:0	3 by admin.		
Contacts	Name	Nagios server			62
Persons	Statu	production			
Teams	Organ	ization -> Demo			
 Configuration Items 	Туре	Monitoring			
 All Applications 	Descri	ption Nagios monitoring			
All Circuits All Interfaces	Paren	t Group -> Nagios server			
All Network devices All Patches	Infr	astructures Contacts			
All Servers	2 obj	ect(s)			Actions
Grouping		Relation	Inf	rastructure	Status
Locations		monitored	→router01		production
 Document 	100				
Incident Management	50	monitoreo	-+routeroz		production
Open Incidents Closed Incident Known Errors					
Change Management					
Open Changes Closed Changes Scheduled Outages					
Service Management	1 and				
and the second second second	Y				

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:

op		Logged as 'admin' Q. Your search Search
All Organizations	Creation	n of a new Infra Group
Welcome	Name	New group
Configuration Management	Status	implementation
Contacts	Organizat	ation Demo 🗹
Persons	Business	Criticity low
 Teams 	Туре	list 👻
 Configuration Items 	Descriptio	ion
All Applications All Circuits	Parent Gr	iroup Group of application 🖌
 All Interfaces All Network devices All Patches All Patches All Pcs All Servers 		<< Back Next>> Finish
Grouping Audit Locations Document		
Incident Management		
Open Incidents Closed Incident Known Errors		
Change Management		
 Open Changes Closed Changes Scheduled Outages 		
Service Management Negociation contracts	~	

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.

іТор		2			Logged in as 'admin' (Administrator) Log off Q Your search Search					
All Organizations				8	Search					
Welcome Configuration Management Contacts	All Documents									
Persons Tooms	1 object(s)				Actions 🗸					
Configuration Items	Nam	e Status	Organization	type	Contents					
All Applications All Circuits All Interfaces All Network devices All Network devices All Patches All PCs All PCs All Subnets	John doxcu	implementation	→ Demo	white paper	Readme-0.9 beta.txt [text/plain, size: 13918 byte(s)]					
Grouping Audit Locations Document										
Service Desk										
 My Service calls Open Service calls 										
Incident Management										
My Incidents Open Incidents Closed Incident Known Errors										
Change Management My Changes										

Figure 54

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

Гор	Logged in as 'admin' (Administrator)	off Q Your search Search
All Organizations	Search	
Welcome Configuration Management	Document: doxcu Last modified on 2010-01-17 15:28:25 by admin.	Actions
Contacts	Name doxcu	
Persons	Status implementation	
Configuration Items	Organization → Demo	
	type white paper	
All Circuits	Description test	
All Interfaces All Network devices	Contents Readme-0.9 beta.txt [text/plain, size: 13918 byte(s)]	
 All Patones All PCs 	Open in New Window: Readme-0.9 beta.txt , Download: Readme-0.9 beta.txt	
All Servers All Subnets	iTop - version 0.9 beta - 18-Jan-2010 Readme file	
Grouping Audit Locations	Content Of This File:	
Document	1. ABOUT THIS RELEASE	
Service Desk	2. INSTALLATION	
My Service calls	2.1. Requirements	
Open Service calls	2.2. Install procedure	
ncident Management	3. LIMITATIONS OF THE CURRENT VERSION	
My Incidents	3.1. Changes since 0.8.1	
Open Incidents	4. HOW TO	
Closed Incident Known Errors	4.3. How to import data into iTop	
Change Management	1 ABOUT THIS DELEASE	
Nu Channes		

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:

іТор	Logged in as 'admin' (Administrator) Log off (4, Your search Search
All Organizations	Creation of a new Document
Welcome Configuration Management Contacts Persons Teams	Name Status implementation Organization - select one type documentation
Configuration Items All Applications All Croatis All Interfaces All Interfaces All Interfaces All Patches All Patches All Patches All Pois All Servers All Server	Description
Grouping Audit Locations Document	Contents Parcourir
Service Desk My Service calls Open Service calls Incident Management My Incidents Open Incidents Open Incidents Open Incidents Open Incidents	
Known Errors Change Management Mu Changer	

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.

Тор			Logged as	'admin' 🤍 Your search	Search
All Organizations	Interactive Audit				~
Welcome	🗉 Audit Rule	# Objects	# Errors % Ok		
Management	Devices in producti	ion 102	102 0.00 %		
Contacts	Devices in production o	on a Location not in production	→ 37 63.73 %		
Persons Teams	Devices not attached t	o a monitoring group	→ 100 1.96 %		
 Configuration Items 					
All Applications All Circuits All Interfaces All Interfaces All Network devices All Patchies All PCs All Servers	4				
Grouping Audit Locations Document					
Incident Management					
Open Incidents Closed Incident Known Errors					
Change Management					
Open Changes Closed Changes Scheduled Outages					
Service Management	1				
Nonneistinn contracte	~				

Figure 57

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

ор			Logger	d as 'admin' 🔍 Your sea	arch Search
All Organizations	Audit	Errors:			
 Welcome Configuration Management 	[Back to	audit results]			
Contacts Persons					
 Teams 	37 obie	ct(s)			Actio
 Configuration Items 		Class	Name	Status	Organization
 All Applications All Circuits 		bizPC	PC01	production	→ Demo
 All Interfaces All Network devices 	1	bizPC	PC02	production	→ Demo
 All Patches All PCs 		bizPC	PC03	production	→ Demo
 All Servers 		bizPC	PC04	production	→ Demo
 Grouping Audit 	ø	bizPC	PC05	production	→ Demo
 Locations Document 	ø	bizPC	PC06	production	→ Demo
Incident Management	ø	bizPC	PC07	production	→ Demo
Open Incidents	ø	bizPC	PC08	production	→ Demo
Known Errors		bizPC	PC09	production	→ Demo
Change Management	5	bizPC	PC10	production	→ Demo
Open Changes Closed Changes	5	bizPC	PC11	production	→ Demo
 Scheduled Outages 	5	bizPC	PC12	production	→ Demo
Service Management		bizPC	PC13	production	→ Demo

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:



Viewing Service call

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

	^							
All Organizations				Se	sarch			
Welcome	2 obj	iect(s)						Action
Configuration		Service Call Ref	Title	Customer	Туре	Status	Severity	Creation date
Contacts	p	S-000004	Need a new PC	→ Demo	Desktop	WorkInProgress	low	2009-09-23 21:20:00
 Persons 	p	S-000005	Need help for iTop	→ My Company/Department	Server	New	low	2009-09-25 22:11:00
All Applications All Circuits All Interfaces All Network devices								
 All Patches All PCs All Servers All Subnets Grouping Audit Locations 								
All Patches All PCs All Servers All Servers All Subnets Grouping Audit Locations Document Service Pack								
Al Patches Al Patches Al Servers Al Servers Al Subnets Grouping Audit Locations Document Service Desk My Service calls Open Service calls								
Al Patches All Patches All Servers Al Servers Al Servers Audit Locations Document Service Desk My Service calls Document Incident Hanagement								

Figure 60

When you click on $\overline{\mathbb{P}}$ button you get details for selected service call.

op			Logged in as 'admin' (Administrator) 🛛 Log off 🔍 Your search	Search
	^		Search	
All Organizations	ServiceCall: §	-000004		Actio
 Welcome Configuration 	Last modified	on 2009-09-23 21:22:09 by admin.		
Management	Service Call Re	f S-000004		
 Contacts 	Title	Need a new PC		
 Persons 	Customer	→ Demo		
► Teams	Туре	Desktop		
 Contiguration Items 	Status	Work In Progress		
All Applications All Circuits	Source	phone		
 All Interfaces 	Severity	low		
 All Network devices All Patches 	Creation date	2009-09-23 21:20:00		
All PCs All Servers All Subnets	Description	Hello I need a new laptop for working		
Grouping Audit	Caller	→ victor.hugo@gmail.com		
Locations	Impact	user cannot work anymore		
Document	Last update	2009-09-23 21:22:09		
Service Desk	Workgroup	→ FLS Desktop		
Open Service calls	Agent	→ salvador.dali@combodo.com		
Incident Management	Action Logs	we are looking into our store		
My Incidents	Resolution			
Open Incidents Closed Incident Known Errors	Impacted I	nfrastructures Related Incidents		
Change Management	1 object(s)			Actions +

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

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

υp			Logged in	as 'admin' (Administrator)	g off Your search	Search
All Organizations	Creation of a new 9	ServiceCall				
Welcome	Title *	New service call				
Configuration	Customer *	Demo 👻				
Contacts		My request				
Persons Teams						
Configuration Items	Description *					
All Applications All Circuits All Interfaces All Network devices All Patches						
All PCs All Servere	Creation date *	2009-09-25 23:24				
All Subnets	Workgroup *	FLS Desktop				
Grouping	Severity *	low 💌				
Audit Locations	Impacted Infrastructure	*	Add Browse			
 Document 			cc Back Next 33	Finish		
Service Desk				J T MISH		
 My Service calls Open Service calls 						
Incident Management						
My Incidents Open Incidents Closed Incident Known Errors						

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.

lected objects:			Available objects:	
Filter			Filter	
PC13	~		PC06	^
PC12		<< Add	PC07 PC08	
-on			PC09	
		Remove >>	PC10	
			PC14	
			PC16	
			PC17	
	~		PC18	~

Figure 63

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

InkInfraTicket attributes		
Impact		
Ok Cancel		

Figure 64

1	
All Organizations	Creation of a new ServiceCall
 Welcome Configuration Management 	Caller *selectone W Related Incident Add. Browse
 Contacts 	<pre><</pre> <pre></pre> <pre></pre> <pre></pre> <pre></pre> <pre>Finish</pre>
 Persons Teams 	
 Configuration Items 	
 All Applications All Circuits All Interfaces All Network devices All Patches All PCs All Servers All Subnets 	
Grouping Audit Locations Document	
Service Desk	
 My Service calls Open Service calls 	
Incident Management	
My Incidents Open Incidents Closed Incident Known Errors	

Figure 65

As for management of impacted infrastructure, y	ou can use either	Add	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 ...

ор			Logged in as 'admin' (Administrator)	og off 🔍 Your search Search
All Organizations	Creation of a new S	erviceCall		
Welcome	Type Server	~		
Configuration Management	Next update			
Contacts	Impact			
Persons Teams				
Configuration Items				
 All Applications All Circuits All Interfaces All Network devices All Patches All PCs All Servers All Servers 	Action Logs			
Grouping Audit Locations Document	Perclution			
Service Desk	Resolution			
 My Service calls Open Service calls 				
Incident Management				
My Incidents Open Incidents Closed Incident Known Errors	Source phone	×	<< Back Next >> Finish	

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".

Start working on this call	
Action Logs	
Related Incident	Add Browse
Cancel 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:

Resolve this call		
Related Incident	Add Browse	
Resolution Cancel Resolve this call		

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







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.

op						Logged as 'ac	tmin' 🔍 Y	′our search	Search
All Organizations	^					Search			
Welcome	8 object/	(s)							Actions
Configuration Management	T	icket Ref	Title	Customer	Туре	Status	Severity	Starting date	Initial Situation
Contacts	J-0/	00001	PC issue	→ Demo	Desktop	WorkInProgress	critical	2009-08-29 10:51:49	there is an issue with my PC
Teams	J-0/	00002	Network issue	→ Demo	Network	Assigned	low	2009-08-29 11:32:44	No more access to the network
Configuration Items All Applications	J0/	00006	Demo	→ Demo	Server	New	low	2009-08-29 11:34:10	gdfgl
All Circuits All Interfaces All Network devices All Network devices	🗖 1-0/	00003	Disk Failure on Server01	→ Demo	Server	WorkInProgress	medium	2009-08-28 22:58:03	Partition /var is no more accessible. It seems that hard disk is broke
All PCs All Servers	J-0/	00004	Oracle Database down on domino	→ Demo	Server	New	low	2009-08-28 22:58:03	Database Oracle is no more accessible on Server01
Grouping Audit	💭 I-0/	00005	Issue with my pc	→ Demo	Desktop	Assigned	medium	2009-08-28 22:58:03	My PC is locked
Locations Document	J 1-0	00007	New Test	→ Demo	Server	New	low	2009-08-28 00:00:00	test
Incident Management Open Incidents Closed Incident	J-00	00008	Router Down	→ Demo	Server	New	low	2009-08-29 00:00:00	
Known Errors Change Management									
Open Changes Closed Changes Scheduled Outages									
Service Management	~								

Figure 73

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

op		Logged as 'admin' 🧠 Your search	Search
All Organizations	s	Search	
	Incident: I-0000	04	Acti
Welcome Configuration Management	Last modified on 2	009-08-28 21:15:19 by Initialization.	
Contacts	Ticket Ref	I-000004	
Persons	Title	Orade Database down on domino	
Teams	Customer	→Demo	
 Configuration Items 	Туре	Server	
 All Applications 	Status	Assigned	
All Circuits All Interfaces	Severity	low	
 All Network devices 	Starting date	2009-09-06 16:58:23	
All PCs	Initial Situation	Database Oracle is no more accessible on Server01	
 All Servers 	Current Situation	Customer cannot access Order web site.	
Grouping	Caller	→ george.dumas@combodo.com	
Locations	Impact	Very critical	
 Document 	Last update	0000-00-00 00:00:00	
Incident Management	Next update	0000-00-00 00:00:00	
Open Incidents Closed Incident	Assignment Count	1	
Known Errors	Workgroup	→ FLS Desktop	
Change Management	Agent	→george.dumas@combodo.com	
 Open Changes 	Action Logs		
Closed Changes Scheduled Outages	Resolution		
Service Management	Impacted Infra	astructures Related Incidents Contacts to Notify	

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

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

ор		Logged as 'admin' 🤍 Your search Search
All Organizations	Creation of a new	v Incident
Welcome	Title *	My first incident ticket
Configuration Management	Customer *	Demo 💌
Contacts	Caller *	Dumas 👻
Persons Teams		Describe here the information corresponding to the incident
 Configuration Items 		
All Applications All Circuits All Circuits All Interfaces All Network devices All Patches All Patches All PCs All Servers	Initial Situation *	
Grouping	Starting date *	2009-09-06 11:30
Audit Locations	Workgroup *	FLS Network 💌
Document	Severity *	low 💌
Incident Management	Impacted Infrastruct	ure* Add Browse
Open Incidents Closed Incident Known Errors		<back next="">> Finish</back>
Change Management		
Open Changes Closed Changes Scheduled Outages		
Service Management		
Nannristinn contracte	*	

Figure 75

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.

elected objects:	Available objects:	
Filter	Filter	
1013 1012 1011	PC06 PC07 PC08 PC09 PC14 PC15 PC16 PC17 PC18	



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

KINTra licket attributes	
npact	
Ok Cancel	

Figure 77

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:

op	Logged as 'admin' 🧠 Your search Search
All Organizations	Creation of a new Incident
 Welcome Configuration Management 	Related Tickets Add Browse
Contacts	
Persons Teams	
 Configuration Items 	
All Applications All Circuits All Interfaces All Network devices All Patches All Patches All PCs All Servers Grouping Avit	
Locations Document	
Incident Management	
Open Incidents Closed Incident Known Errors	-
Change Management	
 Open Changes Closed Changes Scheduled Outages 	
Service Management	
Manadiation contracte	×

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 ...

'op		Logged as 'admin' 🔍 Your search Search
All Organizations	Creation of a new Incident	
Welcome Configuration Management	Type Server 💟	
Contacts		
Persons Teams	Current Situation	
Configuration Items		
All Applications All Circuits All Circuits All Interfaces All Network devices All Patches All PCs All Servers	Impact	
Grouping Audit Locations Document	Action Logs	
Incident Management		
Open Incidents Closed Incident Known Errors		
Change Management		
Open Changes Closed Changes Scheduled Outages		
Service Management	Resolution	
Nanariation contracte		

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.

Workgroup	FLS Desktop 💌	
Agent	Dumas 💙	

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".

Start working on this ticket	
Cancel 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:

Close/resolve	this ticket			
Resolution				
Cancel	Close this ticket			

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

 Managed by Workgroup	Count
FLS Desktop	→ 8
FLS Network	$\rightarrow 1$

Ticket not yes assigned to any agent

		hindle	i.					Actions
	Ticket	Title	Customer	Туре	Status	Severity	Starting date	Initial Situation
Ģ	1-000006	Demo	→ Demo	Server	New	low	2009-08-29 11:34:10	gdfgl
Ģ	I-000007	New Test	→ Demo	Server	New	low	2009-08-28 00:00:00	test
	1-000008	Router	→ Demo	Server	New	low	2009-08-29	



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

op					Logged as 'adm	in' 🤍 Your searc	h Search	
All Organizations	^				Search			
Welcome	3 ob	ject(s)						Actions
Configuration		Ticket Ref	Title	Customer	Status	Planned Outage	Start date	Change Type
Fianagement	Ģ	CM-0000003	1st change	→ Demo	PlannedScheduled	No	0000-00-00 00:00:00	Routine
Persons	p	CM-0000004	Oracle upgrade on domino	→ Demo	Approved	Yes	2009-02-24 00:00:00	Routine
Teams	ø	CM-0000005	IOS upgrade	→ Demo	New	No	0000-00-00 00:00:00	Routine
 Configuration Items 			Constant and the second					
All Interfaces All Network devices All Patches All Patches All Servers Grouping								
Audit Locations Document								
Incident Management								
Open Incidents Closed Incident Known Errors								
Change Management								
Open Changes Closed Changes Scheduled Outages								
Service Management								
 Nannristinn contracte 	*							

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

0000004 on 2009-08-29 10:49:47 by admin. CM-0000004 Orade upgrade on domino → Demo	
on 2009-08-29 10:49:47 by admin. CM-0000004 Orade upgrade on domino →Demo	
CM-0000004 Oracle upgrade on domino → Demo	
Orade upgrade on domino -+ Demo	
→ Demo	
and the second se	a'
Routine	A A
Application	112
→ george.dumas@combodo.com	
st We wan to install last Oracle Patch in order to fix rollback management issues	
Approved	
e Yes	
nt application impacted	
2009-03-17 14:50:34	
2009-02-24 00:00:00	
→ FLS Desktop	
→ george.dumas@combodo.com	
up → FLS Desktop	
→ george.dumas@combodo.com	
→ FLS Desktop	
→ george.dumas@combodo.com	
We will install patch and reboot the server	
and we will supervise the server	
Control of the second	
on	We will install patch and reboot the server log And we will supervise the server If not working we will remove this patch fraster thrues — Contacts to Notify

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 r from a list of change ticket and selecting "New", or from the detail page of another change ticket and using Actions r and selecting "New".

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

іТор		Logged as 'admin' 《 Your search Search
All Organizations	Creation of a new	Change
 Welcome Configuration Management 	Customer * Title *	Demo 💌 My first change
Contacts Persons Teams	Reason for change * Impacted Infrastructur	e * Add Browse
Configuration Items All Applications All Crucits All Interfaces All Interfaces All Interfaces All Pathes All Pathes All Pathes All Servers Grouping Audit Locations Document		
Incident Management Open Incidents Closed Incident Known Errors		
Change Management Open Changes Closed Changes Scheduled Outages		
Service Management	~	

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.

ected objects:		Available objects:	
Filter		Filter	
C13	~	PC06 PC07	<u>^</u>
C11		Add PC08	-
	Ren	ove>>> PC10	
		PC14 PC15	
		PC16 PC17	
	101	PC18	~

Figure 89

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

InkInfraTicket attributes		
Impact		
Ok Cancel		

Once selected all impacted infrastructure click on Next>>> to go to next step. You are prompt to enter other information for this change:

- F			Loggeo		
-	Creation of a n	ew Change			
All Organizations	1	(
Welcome	Change Type	Routine			
Configuration	Domain	Desktop 💌			
Management	Requestor	Dumas 🚩			
 Contacts 	Creation date				
Persons Teams	Last update				
Configuration Items	Start date				
All Applications	Closed Date				
All Circuits All Interfaces	Risk Assessment		STOL -		
All Network devices All Patches	Workgroup	FLS Desktop			
All PCs	Supervisor group	FLS Desktop			
 All Servers 	Manager group	ELS Deskton ¥			
Grouping Audit	Planned Outage	No. Y			
Locations	Thanned Outlage	140			
Insident Management					
Incluent Hanagement					
Closed Incident					
 Known Errors 	Change Request				
Change Management					
Open Changes Open Changes					

Figure 91

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

op			Logged as 'admin' 🤍 Your search	Search
-	Creation of a n	iew change		
All Organizations				
	Final step: confirmation	1		
Welcome	Ticket Ref			
Management	Title	My first change		
Contacts	Customer	→ Demo		
 Persons 	Change Type	Routine		
Teams	Domain	Desktop		
 Configuration Items 	Requestor	→ george.dumas@combodo.com		
 All Applications All Circuits 	Change Request			
 All Interfaces 	Status	New (Unassigned)		
 All Network devices All Patches 	Planned Outage	No		
All PCs	Risk Assessment			
All Set vers	Last update			
Audit	Start date			
Locations Document	Workgroup	→ FLS Desktop		
Incident Management	Agent	→ george.dumas@combodo.com		
Incluent Hanagement	Supervisor group	→ FLS Desktop		
Closed Incident	Supervisor	→ george.dumas@combodo.com		
 Known Errors 	Manager group	→ FLS Desktop		
Change Management	Manager	→ george.dumas@combodo.com		
Open Changes Closed Changes Scheduled Outages	Implementation lo Fallback plan	g		
Service Management	Create bizChang	geTicket		

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.

Plan and Schedule t	nis change for validation	
Risk Assessment		
Implementation log		
Fallback plan		
Cancel Plan	this change	

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:

Implementation pahse for current change	
Cancel Implement this change	

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 **Actions** 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:



Figure 96

Changes by workgroup

Changes not assigned

Changes b	y Workgroup		Cha	nges no	t yet	assigne	d			
	Managed by Workgroup	Count		1 obje	ct(s)					Actions
	FLS Desktop	→ 4		Ticket Ref	Title	Customer	Status	Planned Outage	Start date	Change Type
			P	CM-0000005	IOS upgrade	→Demo	New	No	000-00-00	Emergenc



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

op					Lo	gged in as 'admin' (Adminis	strator) Log off 🤍	Your search	Search
Organizations	^				Sea	rch			_
Nelcome Configuration Management	Service: Supp	port Database	H:59 by Toitialization	14					Ac
Contacts									~
Persons	Name	Support Databa	ise						
Teams	Sta Details	New						6	
Configuration Items	Provider	→ France Teleo	om					5	
All Applications	Service Catego	ory Application							10 -
All Circuits	Туре	Support							70
All Circuits All Interfaces All Network devices	Type Status	Support New							~~
All Circuits All Interfaces All Network devices All Patches	Type Status	Support New We support all y	you DB according to	Service Level.					~~
All Circuits All Interfaces All Network devices All Network devices All Patches All Patches All Pack	Type Status Description	Support New We support all y	you DB according to	Service Level.					
All Circuits All Interfaces All Network devices All Patches All PCs All Servers All Scivers	Type Status Description	Support New We support all y Coverage can b	you DB according to te 5*8 or 24*7	Service Level.					
All Circuits All Interfaces All Network devices All Network devices All Patches All PCs All Subnets Grouping	Type Status Description	Support New We support all y Coverage can b	vou DB according to e 5*8 or 24*7	Service Level.					
All Circuits All Interfaces All Network devices All Patches All Patches All Servers All Servers All Schmets Grouping Audit	Type Status Description Contracts	Support New We support all y Coverage can b	you DB according to the 5*8 or 24*7	Service Level.					
Al Circuits Al Interfaces Al Interfaces Al Interfaces Al Pictorit devices Al Pictorits Al Subnets Grouping Audt Locations	Type Status Description Contracts 2 object(s)	Support New We support all y Coverage can b	you DB according to ne 5*8 or 24*7	Service Level.					Actions
Al Circuits Al Interfaces Al Interfaces Al Patches Al Patches Al Pots Al Servers Al Schnets Grouping Audit Locations Document	Type Status Description Contracts 2 object(s)	Support New We support all y Coverage can b	You DB according to be 5*8 or 24*7 Status	Service Level.	Service	Provider	Service	Service Level	Actions Type
All Orcrauts All Interfaces All Interfaces All Interfaces All Patches All Patches All Patches All Servers All Subnets Grouping Audit Locations Document iervice Desk	Type Status Description Contracts 2 object(s)	Support New We support all y Coverage can b	vou DB according to e 5*8 or 24*7 Status Production	Service Level. Customer → Demo	Service → Support Database	Provider France Telecom	Service Suport Database	Service Level	Actions Type Support
Al Cricruits Al Interfaces Al Interfaces Al Interfaces Al Patches Al Patches Al Patches Al Servers Al Servers Al Servers Al Servers Locators Document Service Desk My Service calls	Type Status Description Contracts 2 object(s) Support	Support New We support all y Coverage can b Name t for Database	vou DB according to e 5*8 or 24*7 Status Production	Service Level.	Service Support Database	Provider France Telecom	Support Database	Service Level Bronze	Actions Type Support
 All Circuits All Interfaces All Interfaces All Patches All Patches All Patches All Patches All Servers All Servers Audit Locations Document Service Desk My Service calls Open Service calls 	Type Status Description Contracts 2 object(s) Suppor	Support New We support all 1 Coverage can b Name t for Database	vou DB according to e 5*8 or 24*7 Status Production Production	Service Level. Customer → Demo → Demo	Service → Support Database → Support Database	Provider France Telecom France Telecom	Service Support Database Support Database	Service Level Bronze Bronze	Actions Type Support Support
 All Circuits All Interfaces All Nethrack devices All Patches All Patches All Patches All Servers All Servers All Servers Audit Locations Document Service Desk My Service calls Open Service calls Incident Management 	Type Status Description Contracts 2 object(s) Suppor test	Support New We support all y Coverage can b Name t for Database	vou DB according to be 5 ^m 8 or 24 ^m 7 Status Production Production	Service Level. Customer → Demo → Demo	Service → Support Database → Support Database	Provider France Telecom France Telecom	Support Database Support Database	Bronze	Actions Type Support Support
 All Grouts All Interfaces All Nethrack devices All Patches All Patches All Patches All Servers All Servers All Servers Locations Document Service Desk My Service calls Gredent Hanagement My Incidents 	Type Status Description Contracts 2 object(s) Suppor	Support New We support all y Coverage can b Name t for Database	vou D8 according to ee 5°8 or 24°7 Status Production Production	Service Level. Customer → Demo → Demo	Service → Support Database → Support Database	Provider France Telecom France Telecom	Support Database Support Database	Service Level Bronze Bronze	Actions Type Support Support
 All Circuits All Interfaces All Nethrok devices All Patches All Patches All Patches All Servers All Servers All Service calls Open Service calls Incident Honagement My Incidents Open Incidents Open Incidents 	Type Status Description Contracts 2 object(s) Support test	Support New We support all y Coverage can b Name t for Database	veu DB according to es 5*8 or 24*7 Status Production Production	Service Level.	Service → Support Database → Support Database	Provider France Telecom France Telecom	Support Database Support Database	Service Level Bronze Bronze	Actions Type Support Support

Figure 99

Creating a new service

Die Charles

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

A wizard then helps you to create your service:

Гор	Logged in as 'admin' (Administrator) Log off Q. Your search Search
All Organizations	Creation of a new Service
Welcome Configuration Management Contacts	Name Provider
Persons Teams Configuration Items All Applications All Applications All Interfaces All Interfaces All Pathos All Pathos All Pathos	Description
All Severs All Subnets Grouping Audit Locations	Type Support Support Finish
Document Service Desk My Service calls Open Service calls	
Open Ser Vice Calls Incident Management My Incidents Open Incidents Closed Incident Known Errors	
Change Management	

Figure 100

Once done, click on Next>>>, 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.

-									
All Organizations	Î				Search				
Welcome	2 ob	ject(s)							Actions
Configuration Management		Name	Status	Customer	Service	Provider	Service	Service Level	Туре
Contacts	ja	Support pour Oracle	New	→ Demo	→ Oracla Application support	Oracle	Oracla Application support	Bronze	Support
Persons Teams	Ģ	Support pour Oracle	New	→ Demo		Oracle	Server management	Silver	Hardwa
 Configuration Items 		- and the							
All Interfaces All Network devices All Patches All PCs									
 All Circuits All Interfaces All Network devices All Patches All PCs All Servers Grouping Audit Locations Document 									
Al Drouts Al Interfaces Al Interfaces Al Interfaces Al Patches Al Patches Al PCs Al PCs Grouping Audit Locations Document Incident Management									
Al Urouts All Interfaces All Interfaces All Network devices All Patches All PCs All PCs Addt Cocations Document Incident Management Known Errors									
Al Drouts Al Interfaces All Network devices All Network devices All PCs All PCs All PCs Addt Cocations Document Incident Management Known Errors Change Management									
Al Urouts Al Interfaces Al Interfaces Al Interfaces Al PCs Al PCs Al PCs Al PCs Al PCs Grouping Audt Locations Document Incident Management Open Incidents Closed Incident Known Errors Change Management Open Changes Scheduled Outages									

Figure 101

When you click on 🗖 button you get details for selected contract

op		Logged as	'admin' 🤍 Your search	Search
-	^		_	
All Organizations	Contract: Support pour	Oracle		Actio
Welcome	Last modified on 2009-08-3	0 12:43:21 by admin.		
Configuration	Name	Support pour Oracle		
 Contacts 	Status	New		
Decone	Customer	→ Demo		CP .
Teams	Service	→ Oracla Application support		
 Configuration Items 	Provider	Orade		
 All Applications 	Туре	Support		
All Circuits All Interfaces	Description			
All Network devices	Team	→ Application support		
All Patches All PCs	Service Level	Bronze		
 All Servers 	Cost			
 Grouping 	Currency	Euros		
Locations	Cost unit	Global		
 Document 	Cost frequency	Once		
Incident Management	Date of move to productio	n 0000-00-00 00:00:00		
Open Incidents	Date of end of production	0000-00-00 00:00:00		
Known Errors	Version number	1		
Change Management	Covered Infrastructur	es Contacts Documents		
Open Changes Closed Changes Scheduled Outages	No object to display,			
Service Management	Click here to create a new Infi	raContractLinks		

"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 r from a list of contract and selecting "New", or from the detail page of another contract and using Actions r and selecting "New".

A wizard then helps you to create your contract:

All Organizations			
All Organizations			
	Name	My contract	
- Malaana	Customer	Demo 💌	
Configuration	Service	Oracla Application support 💌	
Management	Team	Application support	
Contacts	Service Level	Bronze 💌	
Teams	Cost unit	Global 🖌	
Configuration Items	Cost frequency	Once 💌	
All Applications	Cost		
All Circuits All Interfaces All Network devices All Patches All Patches All PCs All Servers	Currency	Euros V	
Grouping Audit Locations Document	Description		
Incident Management			
Open Incidents Closed Incident Known Errors	Date of move to production		J
Change Management	Date of end of production		
Open Changes	Туре	Support V	
 Closed Chariges Scheduled Outages 	Version number	1	

Figure 103

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

ор			Logged as 'admin' 🤍 Your search	Search
All Organizations	Creation of a new C	ontract		
Welcome Configuration	Final step: confirmation			
Management	Name	My contract		
 Contacts 	Status	New		
Persons Torms	Customer	→ Demo		
Configuration Trans	Service	→ Oracla Application support		
Contiguration Ltems	Provider	Oracle		
All Applications All Circuits	Туре	Support		
All Interfaces	Description			
 All Network devices All Patches 	Team	→ Application support		
All PCs All Servers	Service Level	Bronze		
All Selvers	Cost			
Audit	Currency	Euros		
Locations Dogument	Cost unit	Global		
Tocident Management	Cost frequency	Once		
Incident Hanagement	Date of move to production	n		
Closed Incident	Date of end of production			
 Known Errors 	Version number	1		
Change Management Open Changes Closed Changes Scheduled Outages	Create bizContract			
Service Management Negociating contracts				

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 **Actions** menu.

Service management dashboard







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	В	C	D	E	F	G	H	4	J	K	~
1	me	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	AND											

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.

ор						Logged	as 'admin'	Your searchearchearchearchearchearchearchearch	rch [Search]
Demo 🗸	Bulk load	from CSV	data / ste	ep 1							
	bizServer	- Compute	r Servers						~		
Welcome Configuration	Name Locatio	Mgmt IP	Default Brand	Gateway Model	Status OS Fami	Busine	ss Crit OS Ve	icity rsion	Organi Serial	zation Number	
Management Contacts	Shipmen Size	number	Model	Number	of CPUs	Memory	Size	HDD Si	ze	Free	HDD
Persons Teams	domino. 2	IBM	Power 5.	20 Expre	10.22.2 35	AIX	In Pr 4.1	oduction S4523	medium	1 Power	520
Configuration Items	Express srv10	4	8Gb 10.22.2	4x120Gb 8.1	200Gb Product	ion Can	didate	high	1	2	
All Applications All Circuits	IBM 8Gb	4x120Gb	AIX 200Gb	4.1			Power	520 Expr	ess	4	
All Interfaces All Network devices All Patches All PCs	srv11 2 4	10.3.5. IBM 8Gb	4 4x120Gb	10.22.2 AIX 200Gb	8.1 4.1	Produc	tion Ca	ndidate Power	high 520 Expr	1 ess	
All Servers	srv12		10.22.2	8.1	Product	ion Can	didate Power	high	1	2	
Grouping Audit	8Gb	4x120Gb	200Gb				rower	JEC EAPE			
Document	2	10.22.2 IBM	0.4	10.22.2 ATX	4.1	Produc	CION Ca	Power :	520 Expr	- 833	
Incident Management	4	8Gb	4x120Gb	200Gb					ange		
Open Incidents Closed Incident Known Errors											
Change Management											
Open Changes Closed Changes Scheduled Outages											
E Comico Management	L	Financia									

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.

ор				Logged as	'admin' 🔍 Your search	Search
Demo 💌	Guessed # of lines to skip: 1 Target: 5 rows					
Welcome	Name [rk!]	~	domino.comb	odo.com srv 10	srv11	
Configuration Management	MgmtIP	~			10.3.5.4	
Contacts	Default Gateway	~	10.22.28.1	10.22.28.1	10.22.28.1	
 Persons Teams 	Status	*	In Production	Production Cand	idate Production Candidate	
Configuration Items	Business Criticity	~	medium	high	high	
All Applications All Circuits All Interfaces	Organization (pkey)	*	✓ 1	1	1	
All Network devices	Location (pkey)	*	2	2	2	
All PCs All Servers	Brand	*	IBM	IBM	IBM	
Grouping Audit	Model	*	Power 520 Ex	press		
Locations Document	OS Family	~	AIX	AIX	AIX	
Incident Management	OS Version	*	4.1	4.1	4.1	
Open Incidents Closed Incident	Serial Number	~	S4523			
 Known Errors 	Shipment number	~				
Change management Open Changes	Model	~	Power 520 Ex	press Power 520 Expre	ess Power 520 Express	
 Closed Changes Scheduled Outages 	Number of CPUs	*	4	4	4	
Service Management	Memory Size	~	BGb	8Gb	8Gb	
Nonsciation contracte						

<u>Figure 109</u>

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.

						Logged	as 'admin'	Your se	arch	Sea	.rch		
SI VII	10	0.0.0.7	10.22.20.1	Candidate	nıyn	1	۷	101	4	AIX	7.1		
srv12			10.22.28.1	Production Candidate	high	1	2	IBN	1	AIX	4.1		
srv13	10	0.22.28.4	10.22.28.1	Production Candidate	high	1	2	IBN	4	AIX	4.1		
Column co	onsiste	ency											
Check													
Reconciliatio	n Status	i N	lame	Organiza	tion	Mgmt IP	Default Gateway	Status	Business Criticity	Location	1 Brand	Model	0 Fan
Found a match 106	update 1 cols	domino.c	ombodo.com	1			10.22.28.1	In Production	medium (previous: medium)	2	IBM	Power 520 Express	AIX
Object not found	Create	srv 10		1			10.22.28.1	Production Candidate	high	2	IBM	Power 520 Express	AIX
Object not found	Create	srv11		1	1	10.3.5.4	10.22.28.1	Production Candidate	high	2	IBM	Power 520 Express	AIX
Object not found	Create	srv12		1			10.22.28.1	Production Candidate	high	2	IBM	Power 520 Express	AIX
Object not found	Create	srv13		1	1	10.22.28.4	10.22.28.1	Production Candidate	high	2	IBM	Power 520 Express	AIX
Back	ext												
	srv12 srv13 Column co Check Pound a match 106 Object not found Object not found Object not found Object not found	srv12 srv13 1 Column consist Check Found a match update 106 Object not Create Object not Create Object not Create Object not Create Back Next	srv12 srv13 10.22.28.4 Column consistency Check Reconciliation Status M Found a match update found create srv10 Object not found Create srv11 Object not found Create srv12 Object not found Create srv12 Object not found Create srv12 Object not found Create srv13 Object not found Create srv13 Object not found Create srv13 Object not found Create srv13	srv12 0.22.28.1 srv13 0.22.28.4 0.22.28.1 Column construction Check Reconciliation Status Name Found a match update domino.combodo.com Object not 0 create srv10 Object not 0 create srv10 Object not 0 create srv12 Object not 0 create srv12 Object not 0 create srv12 Object not 0 create srv12 Object not 0 create srv13 Different 0 create srv13 Different 0 create srv13	srv12 10.22.28.1 Production Candidate srv13 10.22.28.4 10.22.28.1 Production Candidate Column consistency Check Reconciliation Status Name Organization 1000 Found a match update 1000 domino.combodo.com 1 Object not found Create srv10 1 Object not found Create srv11 1 Object not found Create srv12 1 Object not found Create srv13 1	srv12 10.22.28.1 Production high srv13 10.22.28.4 10.22.28.1 Production high Column consistency Check Reconciliation Status Name Organization Found a match update domino.combodo.com 1 Object not Create srv11 1 1 Object not Create srv12 1 1 Object not Create srv12 1 1 1 Object not Create srv13 1 1 1 1 Object not Create srv13 1 1 1 1 1 Object not Create srv13 1	srv12 10.22.28.1 Production high integration high integrate high integrate high integrate high int	srv12 10.22.28.1 Production Production High 1 2 srv13 10.22.28.4 10.22.28.1 Production High 1 2 Column consistency Check Production High 1 2 Production High 1 2 Column consistency Check Pound a match update domino.combodo.com 1 - Postart Object not Create srv11 1 1 0.22.28.1 Object not Create srv12 1 10.3.5.4 10.22.28.1 Object not Create srv13 1 10.22.28.1 Back Next Next Next Next	srv12 10.22.28.1 Production conditioner high 1 2 188 srv13 10.22.28.4 10.22.28.1 Production conditioner high 1 2 188 Column consistency Column consistency Check Pound a match update domino.combado.com 1 Default Default Production Object not Create srv11 1 1 10.22.28.1 Production Object not Create srv12 1 10.3.5.4 10.22.28.1 Production Object not Create srv12 1 10.22.28.4 Production Object not Create srv13 1 10.22.28.4 Production Object not Create srv13 1 10.22.28.4 Production Object not Create srv13 1 10.22.28.4 Production Back Next Next Next Next Next	srv12 10.22.28.1 Production candidate high 1 2 IBM srv13 10.22.28.4 10.22.28.1 Production candidate high 1 2 IBM IBM Column consistency Column consistency Column consistency Column consistency Candidate Mame Organization Mgmt IP Default Cateway Status Business Criticity Found a match update domino.combodo.com 1 0.22.28.1 In medum, Gendidate medum, medum, Gendidate medum, Medum, Gendidate medum, Medum, Gendidate medum, Gendidate medum, Medum, Gendidate medum, Gendidate medum, Gendidate medum, Gendidate medum, Medum, Gendidate medum, Gendidate medum,	srv12 10.22.28.1 Production high in the production in the productin the production in the productin the production in the	srv12 10.22.28.1 Production high 1 2 IBM AIX 4.1 srv13 10.22.28.4 10.22.28.1 Production high 1 2 IBM AIX 4.1 Column consistency Colspan="4">Status Mare Organization Mgmt I 0.22.28.1 Production frequence of colspan="4">Reconciliation Status Name Organization Mgmt I 0.22.28.1 Production frequence of colspan="4">Reconciliation Status Name Name	srv12 10.22.28.1 Production high of candidate high of candi

<u>Figure 110</u>

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

чp							Logged a	is 'admin'	< Your se	arch	Sear	rch		
Demo 💌	srv11	10	.3.5.4	10.22.28.1	Production Candidate	high	1	2	IBM		AIX	4.1		
Welcome Configuration Management	srv 12			10.22.28.1	Production Candidate	high	1	2	IBM		AIX	4,1		
Contacts Persons	srv13	10	.22.28.4	10.22.28.1	Production Candidate	high	1	2	IBM		AIX	4.1		
Configuration Items	Processing													
All Circuits All Interfaces All Network devices	Reconciliation	Status	. 1	Name	Organiz	ation	Mgmt IP	Default Gateway	Status	Business Criticity	Location	n Brand	i Model	Fa
 All Patches All PCs All Servers 	Found a match 106	update 1 cols	domino.	combodo.com	n 1			10.22.28.	In Production	medium (previous: medium)	2	IBM	Power 520 Express	A
Grouping Audit Locations	Object not found	Created (331)	srv10		1			10.22.28.1	Production Candidate	high	2	IBM	Power 520 Express	A
Document Incident Management Open Incidents	Object not found	Created (332)	srv11		1		10.3.5.4	10.22.28.1	Production Candidate	high	2	IBM	Power 520 Express	A
Closed Incident Known Errors	Object not found	Created (333)	srv12		1			10.22.28.1	Production Candidate	high	2	IBM	Power 520 Express	A
Change Management Open Changes Closed Changes Scheduled Outpress	Object not found	Created (334)	srv13		1		10.22.28.4	10.22.28.1	Production Candidate	high	2	IBM	Power 520 Express	A
 Scheduled Outages 	Back													

<u>Figure 111</u>