



# iTop implementation guide

*version 0.1 – for iTop 1.0 beta*

*The purpose of this document is to describe step by step which iTop objects have to be created to implement iTop for your organization. For instance, in order to create an Incident ticket, you need to make sure that the caller exists, that there is at least one contract documented for this customer defining services delivered by the support center, etc.*

*This document explains which order to follow for creating the objects, and what are the dependencies between the various iTop objects.*

*This document does not describe in details how to use all the features of iTop. For more details about the usage of iTop, refer to “iTop user guide”.*

## **1 Creating new objects in iTop**

There are several ways to create new objects in iTop, depending on the type of object and whether you want to create the objects interactively, one by one, or in bulk mode.

### **FROM THE MENU**

This is the most straightforward way to create one object. Click on the appropriate menu on the left (like “Persons”) to display the list of the already existing objects of this class. You get either a link to create a new object or the list of such objects. In the latter case, click on the “Actions” menu and select “New...”. Fill the form, submit it and you are done.

### **FROM CSV IMPORT**

If you wish to create many instances of the same class of objects, it is often easier to import them from an existing data set. The CSV Import tool, under the “Data Administration” menu, is designed for this.

Prepare your data by exporting them in CSV format: text file, with one object per line and values separated by a fixed character (semicolon, comma or tab). Then let the CSV import wizard guide you into loading the file into iTop.

## FROM THE UNIVERSAL SEARCH

Some objects (like Organizations for example) are managed mainly during the initial implementation of the application, and mostly by administrators. Therefore there is no “Organizations” link in the main menu. To create a new object of such a class, use the menu “Universal Search” in the “Admin Tools” section. Perform a search for objects of this class, then use the “Actions → New...” popup menu to create a new instance of the class.

## 2 Organizations, Locations, Teams and Contacts

### CREATE ORGANIZATIONS

After installing iTop you have one organization created by default during the setup and called “My Company/Department”. If you want to represent several departments or customers you have to create new organizations. This has to be done before creating all other objects, since Organizations are logical containers for most other objects (CIs, Services, Tickets). At this stage you can define internal organizations (departments) as well as external organizations (suppliers, customers...), depending on the usage and scope you're planning for iTop.

### CREATE LOCATIONS

The locations are very useful for grouping object by geography. Even if the location attribute is not a mandatory field when you create a CI in the CMDB, it is strongly recommended to create locations beforehand and then to track the locations of all CIs.

Locations can be organized in a hierarchy in iTop: each location being optionally linked to a parent location.

### CREATE PERSONS

The persons are very important in iTop as they are used to define contacts and responsibilities. A person belong to one and only one organization. Persons can be members of team, and therefore should be created before trying to setup teams.

### CREATE TEAMS

The teams are linked to several types of object like contracts or tickets in order to define responsibilities. You have to make sure that the teams exists before creating tickets, contracts, user requests. Team used for assigning tickets must also have at least one member (the agent to assign the ticket to).

The attribute “Role” on the link between a team and a person is not mandatory, so you can leave it empty, but it useful to define the role of the person in the team (like Team Leader...).

## 3 CMDB

The purpose of this chapter is to describe the dependencies between the various *Configuration Items* (CIs) in the CMDB.

## CREATE INFRASTRUCTURE CIS

You can easily create Network devices, Server, Personal Computers, Printers and Mobile Phone as soon as your organizations and locations are created.

## CREATE SOFTWARES INSTALLED

Before creating the softwares installed on an infrastructure, you have to define the “typology” of standard applications known in iTop. This is done via menu “Data Administration → Applications” .

You need as well to create the Licences if you wan to manage such objects but this can be done later.

Once done, you can create the softwares installed on an infrastructure. The attribute “device” depends on the selected owner organization, the attribute software is the list of applications you have created in “Data Administration → Applications”

## 4 Services Management

This step is really mandatory if you plan to use Incident and User Request objects. As a matter of fact, they use services and contracts to define categories for grouping, as well as to define default work groups responsible for handling each ticket.

The following process can be applied to create services and customer contracts:

### CREATE SERVICES

Define the “Service Catalog” of each organization by creating the corresponding Service objects. Each organization “owning” some services can then become a provider for other organizations.

### CREATE SUB SERVICES

Once a service is created you can define sub services that are linked to this service. This is mandatory for creating Incidents or User Request tickets related this service.

### CREATE SLTs

The *Service Level Targets* (SLTs) defines the metrics that will be used to compute whether of not the *Service Level Agreements* (SLAs) is met when processing Incidents or User Requests. If you want to use this feature in iTop you have to define them, before creating the SLAs.

By default iTop offers two types of metrics common to both types of tickets: TTO and TTR.

| Metric Name | Meaning         | Definition   |
|-------------|-----------------|--|
| TTO         | Time To Own     | The time elapsed between the creation of the ticket in the system and its assignation to someone to work on.                 |
| TTR         | Time To Resolve | The time elapsed between the creation of the ticket in the system and the “resolution” of the ticket (when the ticket is set |

|  |  |                            |
|--|--|----------------------------|
|  |  | to the status “resolved”). |
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## CREATE SLAS

A SLA is a group of SLTs that is linked to a particular service.

The SLAs are used to define what agreement was signed with a customer for a given contract. iTop uses them to find which SLT are applicable for a given customer when it computes color code and escalation deadline for Incident and User Request tickets. If no SLA is defined, this computation does not occur.

When creating a SLA you can pick between already defined SLTs.

## CREATE CUSTOMER CONTRACTS

Once you have created a service with sub services, SLTs and SLAs you can create a customer contract for this service.

The contract is linked to a given service via the associated SLAs. You can define several SLAs for a given customer contract.

If no SLAs are defined, iTop won't know to which service it is related to, and won't be able to use it in Incident Management and Helpdesk modules.

The customer contract also defines the support team that will be the primary assignee when a new ticket is created for this customer and this service.

If the support team is not set, you won't be able to create tickets based on this customer contract.

## 5 Implementing Incident & User Request Management

This chapter describes what needs to be checked when creating an Incident or a User Request.

If you have not followed previous steps, you may encounter issues when creating an incident or a user request ticket. As a matter of fact, some mandatory attributes depends on other object, and if they are not defined, you won't be able to create the ticket.

### CHECK CUSTOMER

The customer attribute is the first attribute you have to select when you create a ticket. Many other attributes of the ticket depend on it: caller, service, sub service and workgroup...

A customer is simply an Organization (cf Create organizations) that has some valid Customer Contracts (cf Services Management) with another organization.

### CHECK CALLER

If the list is empty, it means that there is no person defined for the selected customer (organization). Refer to Create persons, to see how to create them.

## CHECK SERVICE

The attribute Service depends on the selected Customer and the Customer Contracts defined for this organization. If there is no customer contract defined for the selected organization the list will be empty.

Moreover, even if there is a contract defined, but no SLAs linked to this contract, the service list will be empty as well.

So has described in Create SLAs, before creating Incident or User Request tickets for a given customer, make sure you have defined at least one Customer Contract with at least one valid SLA for it.

## CHECK SUB SERVICE

The attribute sub service depends on the selected service. If you did not define sub services for the selected service in "Create Sub services", the list will be empty and you won't be able to create the ticket.

## CHECK WORKGROUP

The workgroup attribute depends on the selected service and related contract signed for the selected customer.

You will see in the workgroup list all teams defined in customer contracts that are linked to the selected service via a SLA.

If there is no SLA are set, or if no team was defined in related contract, then the workgroup list will be empty and you won't be able to create a ticket.

## CHECK AGENT

When you want to assign an incident or a user request you have to update the corresponding attribute. This one depends on the selected workgroup.

As workgroup are teams, if the corresponding team as no member, the agent list will be empty and you won't be able to assign the ticket.

So make sure that all teams used when you create customer contracts have at least one member defined.

## **6 Implementing Change Management**

This chapter describes what need to be checked when creating a new Change ticket.

Only Organizations (customers), Teams and team members (Contacts) and off-course CIs are used when defining Change Tickets.

## CHECK CUSTOMER

The customer attributes is the first one to select when you create a change ticket. As a matter of fact, the requester attribute depend on it. Any Organization can be the customer of a Change ticket.

## CHECK REQUESTER

If the list for selecting is empty, it means that there is no Person defined for the selected customer. Refer to Create persons for fixing this.

## CHECK WORKGROUP

If there is no team defined in iTop, the workgroup, supervisor team, and manager team list will be empty. So make sure you have at least one team defined in iTop for creating a change ticket.

## CHECK AGENT, SUPERVISOR AND MANAGER

The agent list depends on the workgroup team. So if there is no member in this team, the list will be empty.

The supervisor list depends on the supervisor team. So if there is no member in this team, the list will be empty.

The manager list depends on the manager team. So if there is no member in this team, the list will be empty.