

iTop Documentation for End-Users

(v2.0)

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iTop Documentation for End-Users

- The [User Manual](#) explains all you need to know to use the application, independently of the installed data model
- The Portal Manual is for users who access iTop through its “portal” user interface
- The [Data Model Documentation](#) explains the different objects managed in iTop, their role and relationships
- The [Implementation Guide](#) explains what you need to know if you want to load your data into an empty iTop database.

iTop User’s Manual

This documentation explains how to navigate in iTop, perform basics tasks such as searching for objects, creating or modifying objects and customizing the iTop user interface (lists, shortcuts, dashboards).

Even though the types of objects manageable in iTop depend on the modules installed during the setup of the application, the general principles described in this document do not vary.

Depending on your *user account*, some features can be disabled. This is because user rights depend on the type of objects concerned by the feature and the profiles given to your *user account*. Please contact your administrator to manage your rights.

For explanations about what are the different objects managed in iTop and what is their meaning, refer to the [Data Model Documentation](#).

Connecting to iTop

The first screen displayed by iTop is the login screen, since each iTop user must be identified before accessing the application.

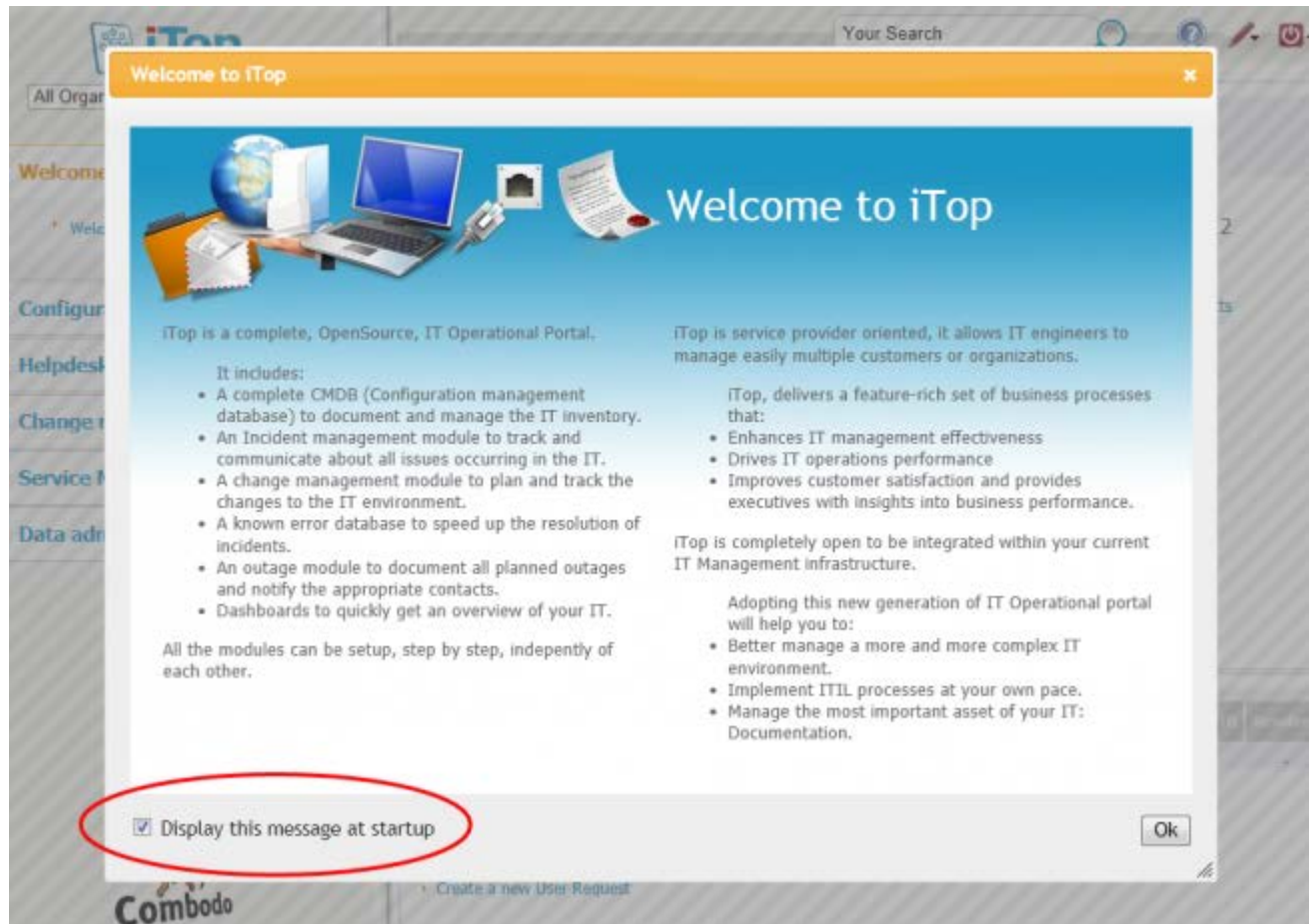
Enter your identifier (User name) and password, as supplied by your administrator, and click on “Enter iTop” .



The screenshot shows the iTop login interface. At the top left is the iTop logo, which consists of a blue square icon with a white grid pattern and the text 'iTop' in blue. Below the logo, the text 'Welcome to iTop!' is displayed in a bold blue font. Underneath, the instruction 'Identify yourself before continuing' is shown in a smaller black font. There are two input fields: the first is labeled 'User Name:' and contains the text 'john.doe@demo.com'; the second is labeled 'Password:' and contains four black dots. At the bottom of the form is a blue button with the text 'Enter iTop' in white.

Your identifier is normally not case sensitive, but your password must be typed exactly as supplied by your administrator.

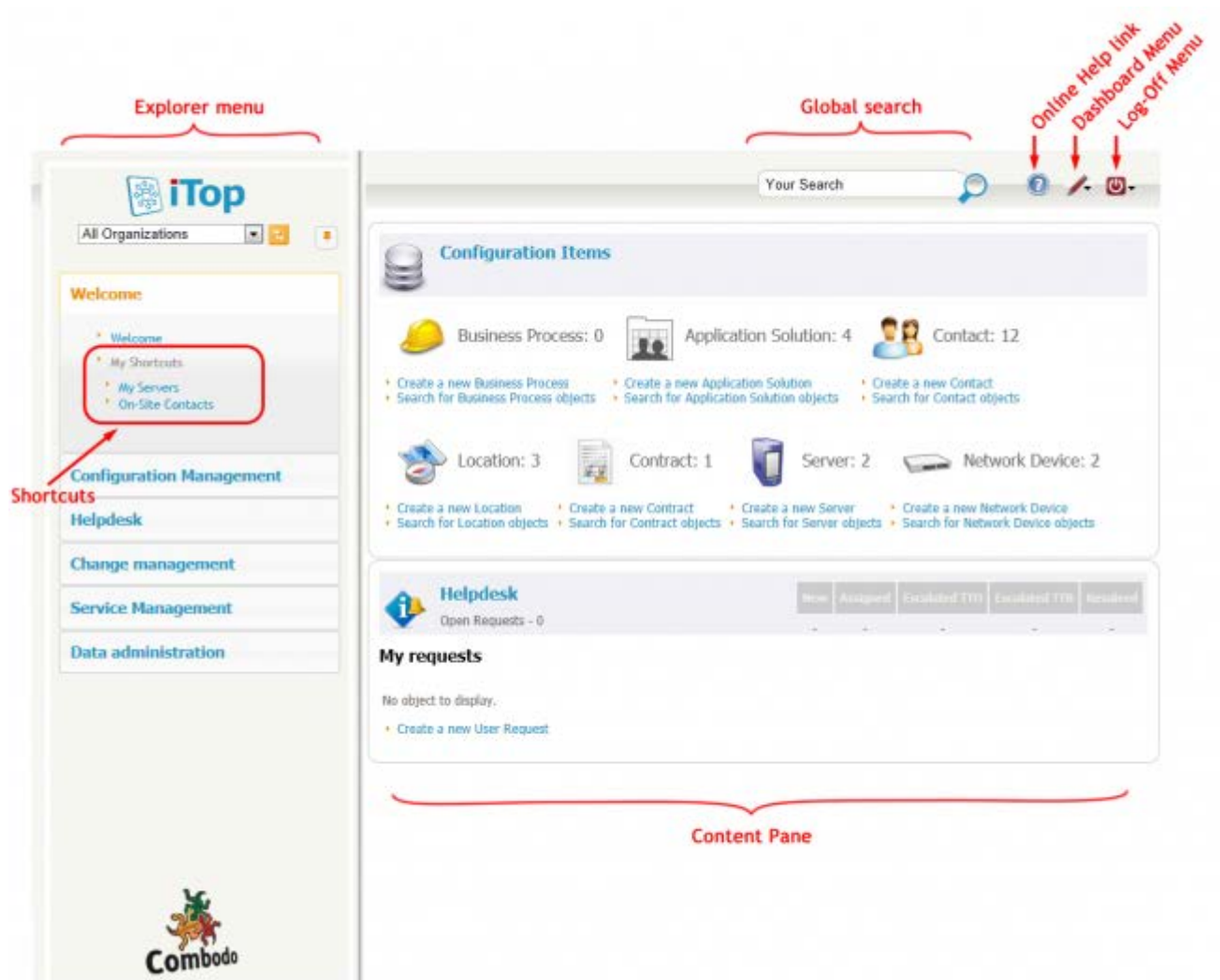
The first time you connect to iTop, the following welcome dialog is displayed:




To skip this dialog and access directly the main screen of the application the next time you connect to iTop, uncheck “Display this message at startup”, before clicking on the “Ok” button to close the dialog.

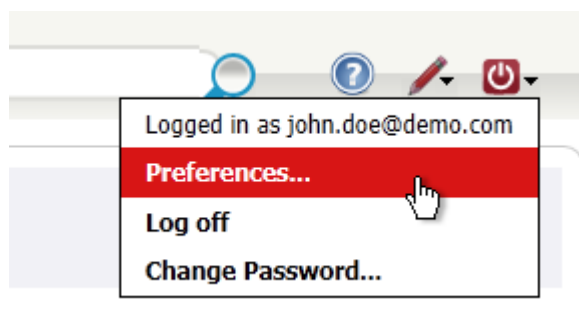
iTop Main Screen

The picture below shows the main screen of the application, it contains all the standard elements of the iTop screens:



The Log-Off menu

At the top-right of the page, a popup menu is accessible by clicking on the “On/off” icon:  ▾



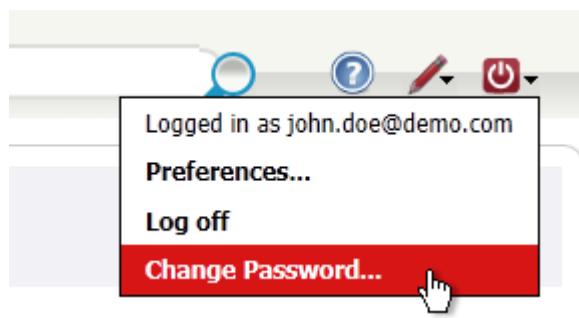
The first line of the popup displays the name of the currently logged-in user. If this user is an administrator for the application, this is also shown on this line.

Other lines in bold typeface are “Actions” . Clicking on them will launch the action corresponding to this menu item.

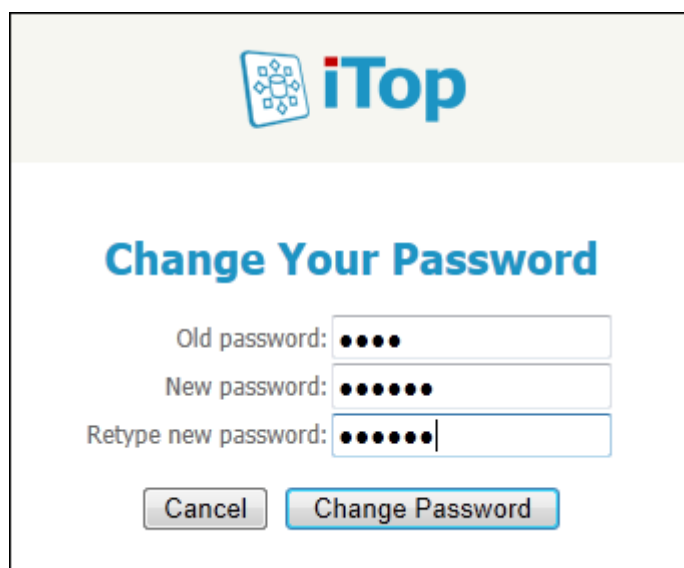
- “Preferences” is for managing your user preferences in the application (language, favorite organizations, etc.)
- “Log off” is for terminating your session with iTop
- “Change password...” is for changing your iTop password

Changing your password

The “Change Password...” menu item is not present when using an external mechanism to authenticate with iTop (like LDAP, Active Directory, or a Single-Sign-On authentication). In this case you should use your usual method to manage your password.



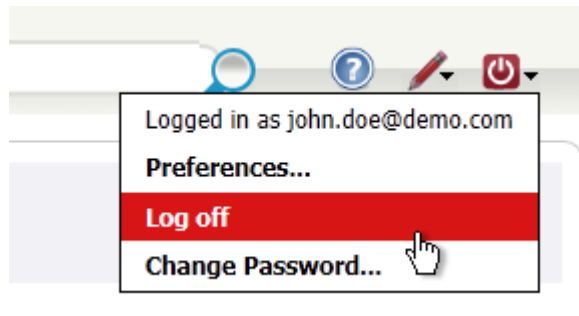
By clicking on the “Change Password...” menu item, the following form is displayed:

A screenshot of the 'Change Your Password' form in the iTop application. The form has a header with the iTop logo and the title 'Change Your Password'. Below the title, there are three input fields: 'Old password:' with four dots, 'New password:' with seven dots, and 'Retype new password:' with seven dots and a cursor. At the bottom, there are two buttons: 'Cancel' and 'Change Password'.

You must type the “old” password and type two times exactly the same new password. When this is done, press “Change Password” to validate your change.

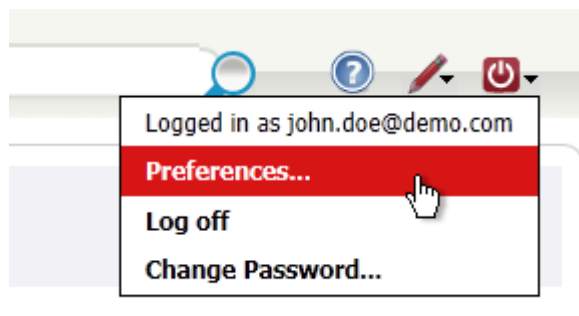
If you forgot your password, ask your administrator to reset it for you.

Disconnecting from iTop




An alternate way to close your iTop session is to close your web browser. Note that closing only the “tabs” or windows showing iTop pages but keeping the web browser open is not sufficient to terminate your session with iTop. The session will be kept open until the last window is closed.

Managing your Preferences



The “Preferences...” menu allows each user to configure:

- The language for the iTop user interface
- The default length for displaying any list of search results
- The list of “favorites” Organizations to be displayed in the “context” menu
- The user's personal shortcuts

 **Preferences...**

Language of the User Interface

Select your preferred language

Other Settings

Default length for lists: items per page

Favorite Organizations

Check in the list below the organizations that you want to see in the drop-down menu for a quick access. Note that this is not a security setting, objects from any organization are still visible and can be accessed by selecting "All Organizations" in the drop-down list.

Total: 3 objects (3 objects selected).

<input type="checkbox"/>	Organization	Code	Status	Parent
<input checked="" type="checkbox"/>	Demo		Active	undefined
<input checked="" type="checkbox"/>	IT Department	IT	Active	undefined
<input checked="" type="checkbox"/>	My Company/Department	SOMECODE	Active	undefined

My Shortcuts

Total: 1 objects (1 objects selected).

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Onsite Contacts

All the settings managed in this page apply only to the current user.

Language

To change the language of the user interface, select the desired language from the drop-down list and click on “Apply” .

Other settings

The “Default length for lists” is used to limit the display size of the lists of objects, for example when performing a search. If the number of

elements in the list exceeds this value, then the list will display the objects by “page”. Each page containing at most “default length” objects. Displaying more objects per page may be more convenient but is also slower.

To modify the default value, change the number then click “Apply”.

This value is the default that applies to all lists that do not have a specific configuration. (See [Managing Lists](#) for how to configure a specific list).

Favorite organizations

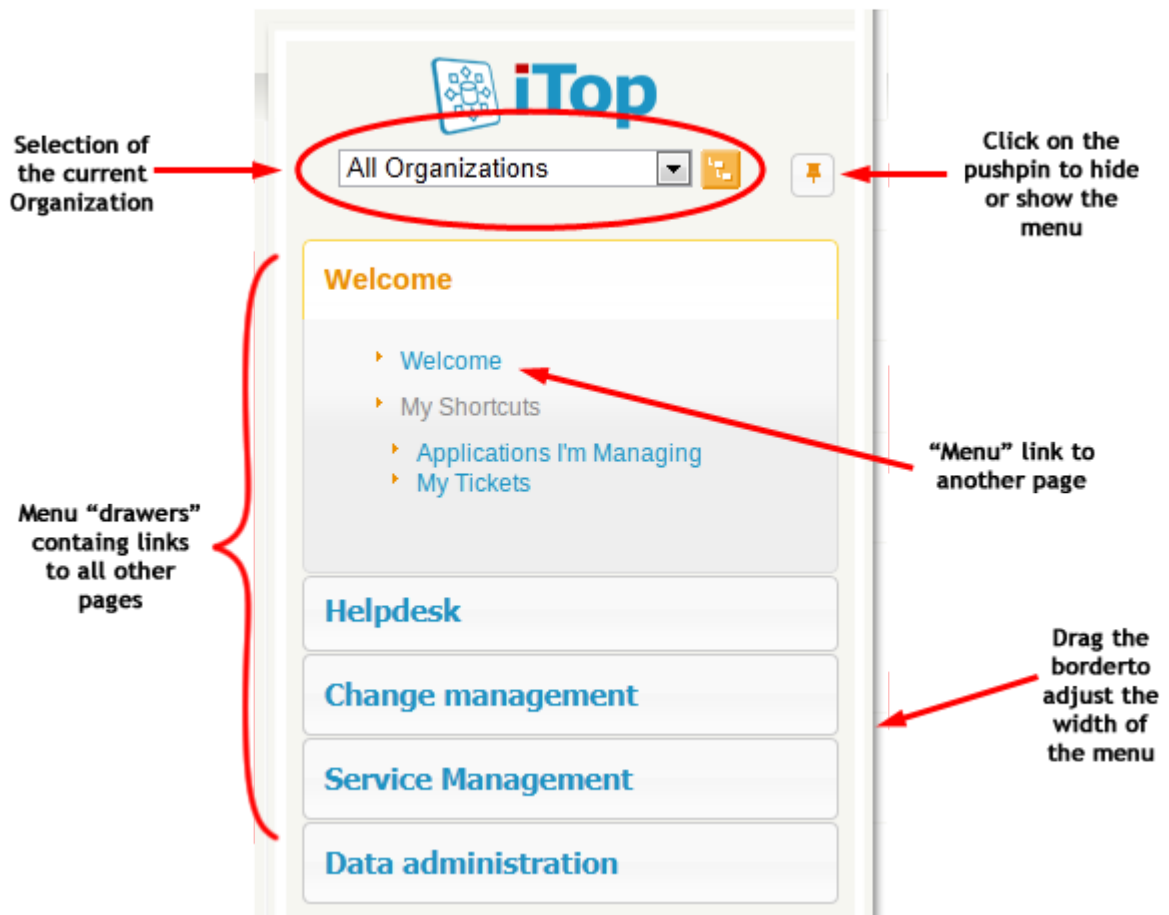
In large companies, not all users are interested by all organizations documented in iTop (for example if a given user works only for a given set of customers). This setting lets each user tailor the list of organizations that appear in the context menu at the top-left of their iTop pages, in order to ease the navigation in the application.

Shortcuts

Use this to rename or delete user-created shortcuts. (See [User shortcuts](#) for how to create shortcuts). The shortcuts appear in the main menu immediately below the “Welcome” menu. To rename a shortcut, check the checkbox in front of its name and click on “Rename...”. To delete shortcuts, check the checkboxes in front of their name and click on “Delete” (A popup confirmation message is displayed).

The Explorer Menu

On the left of the screen, a resizable pane holds the “Explorer Menu” for the application. This is the entry point to all the iTop features.



In order to optimize the space on screen, the size of the menu may be adjusted by dragging its right border. You can also completely hide the menu by clicking on the "pushpin" icon at the top-right. Once the menu is hidden, move the cursor of the mouse next to the left border of the page to make the menu appear again. Click on the pushpin again to "pin" it on the page, or let the menu disappear again when you move the mouse out of it.

Organizations

Many of the objects managed in iTop belong to an *Organization*. Organizations are the main means to arrange objects in iTop. For example the access control is based on Organizations: a given user may be allowed to access only a given set of Organizations. Moreover the "Organizations Selection" menu at the top of the menu allows the end-user to limit the current display to the context of the given Organization. Once an Organization is selected, this "context" information is kept from page to page. To reset the context and display again all iTop objects, simply select "All Organizations" in the drop-down list.

If the list of all possible Organizations is too long (more than 50), then the drop-down list is replaced by an “auto-complete”. In this case just type at least three letters of the name of an Organization to select it. If you are unsure about the naming, use the “magnifier” icon to search for Organizations.

Depending on your access rights in iTop, you may not have access to some Organizations. In this case, the “forbidden” Organizations are not listed in the drop-down box, and the objects belonging to these Organizations are not accessible to you either.

It is sometimes desirable to shorten the list of Organizations displayed in the drop-down box. For instance you may need to view only your customers of interest. Refer to [Managing your preferences](#) for more information about how to configure the list.

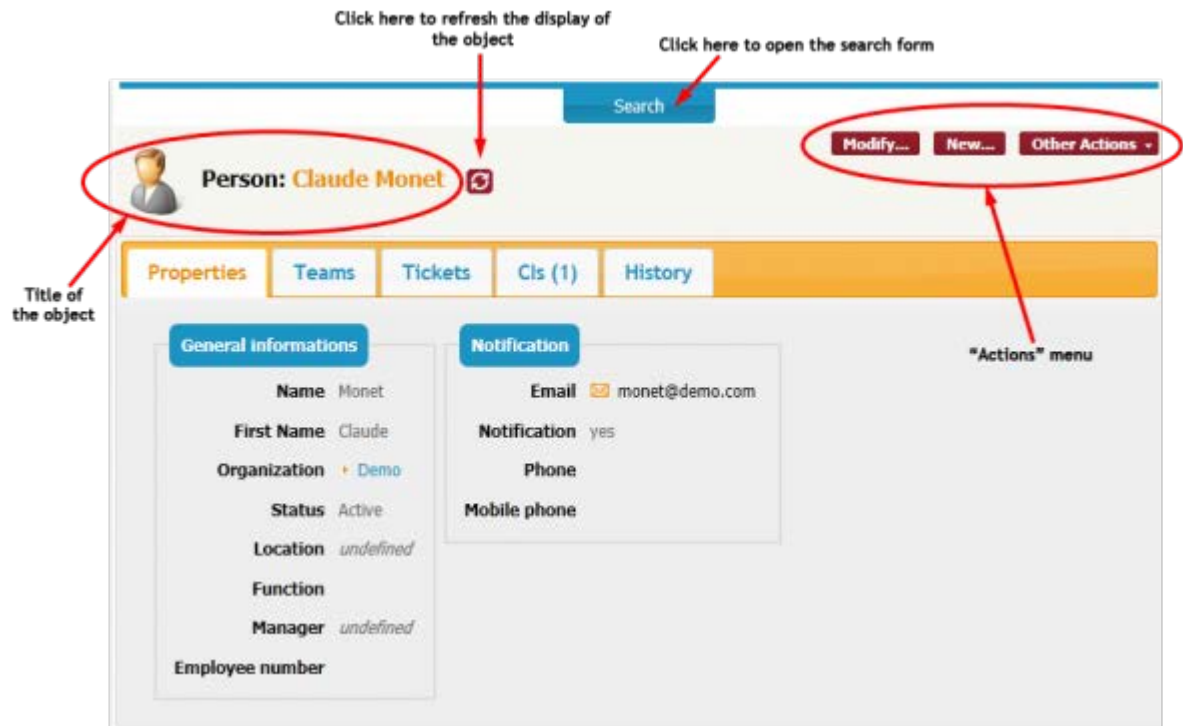
Menu "Drawers"

The main menu organizes the iTop features into several “drawers” , one per process (or area of interest). Clicking on the title of a “drawer” toggles the display of its content. Only one “drawer” is open at a time.

Inside each “drawer” , links give access to the various features of iTop.

Display and Modification of an object

The details of an object are always displayed in the same manner in iTop, as shown below:



The title area contains the icon representing the given class (or type) of the object followed by the class (here “Person”), followed by the actual name of the object.

The blue tab “Search” above the title toggles the display of the search form for this class of objects.

The actions allowed for this object are listed, as dark red buttons, at the top-right of the page. The most frequent actions are displayed as direct buttons, the remaining actions are accessible through the popup menu “Other Actions...” .

The tab “Properties” displays the actual properties of the object.

The tab “History” displays the history of all modifications performed on this object (*who* modified *what* and *when*).

Depending on the class of the object displayed (for example for Tickets), an extra tab “Notifications” may be available, showing all the notifications sent in response to events on this object.

The other tabs display the relationships between the selected object and other objects in the database.

For example, the tab “Teams” displays all the teams for which the selected person is a member of the team. The tab “Tickets” displays the tickets for which the selected person is the requester.

Modification of an object

To modify an object, click on the “Modify...” action from the details of the object (The same action is also available on a list containing only one object).

The form to modify an object is quite similar to its details, except that the fields are editable. For example, the form to modify a Person looks like as shown below:

The screenshot shows a web interface for modifying a person's details. The title is "Modification of Person: Claude Monet". The interface includes a "Cancel" and "Apply" button at the top left. Below this is a tabbed menu with "Properties", "Teams", "Tickets", and "Cls (1)". The "Properties" tab is selected, showing two main sections: "General informations" and "Notification".

General informations:

- Name: Monet
- First Name: (blank) with a red exclamation mark icon
- Organization: Demo
- Status: Active
- Location: -- select one --
- Function: (blank)
- Manager: -- select one --
- Employee number: (blank)

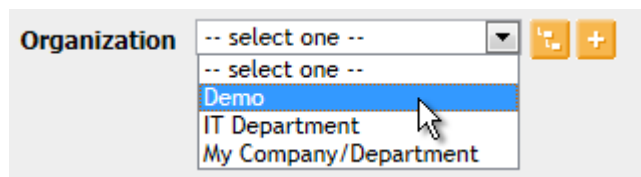
Notification:

- Email: monet@demo.com
- Notification: no yes
- Phone: (blank)
- Mobile phone: (blank)

At the bottom of the form, there are "Cancel" and "Apply" buttons.

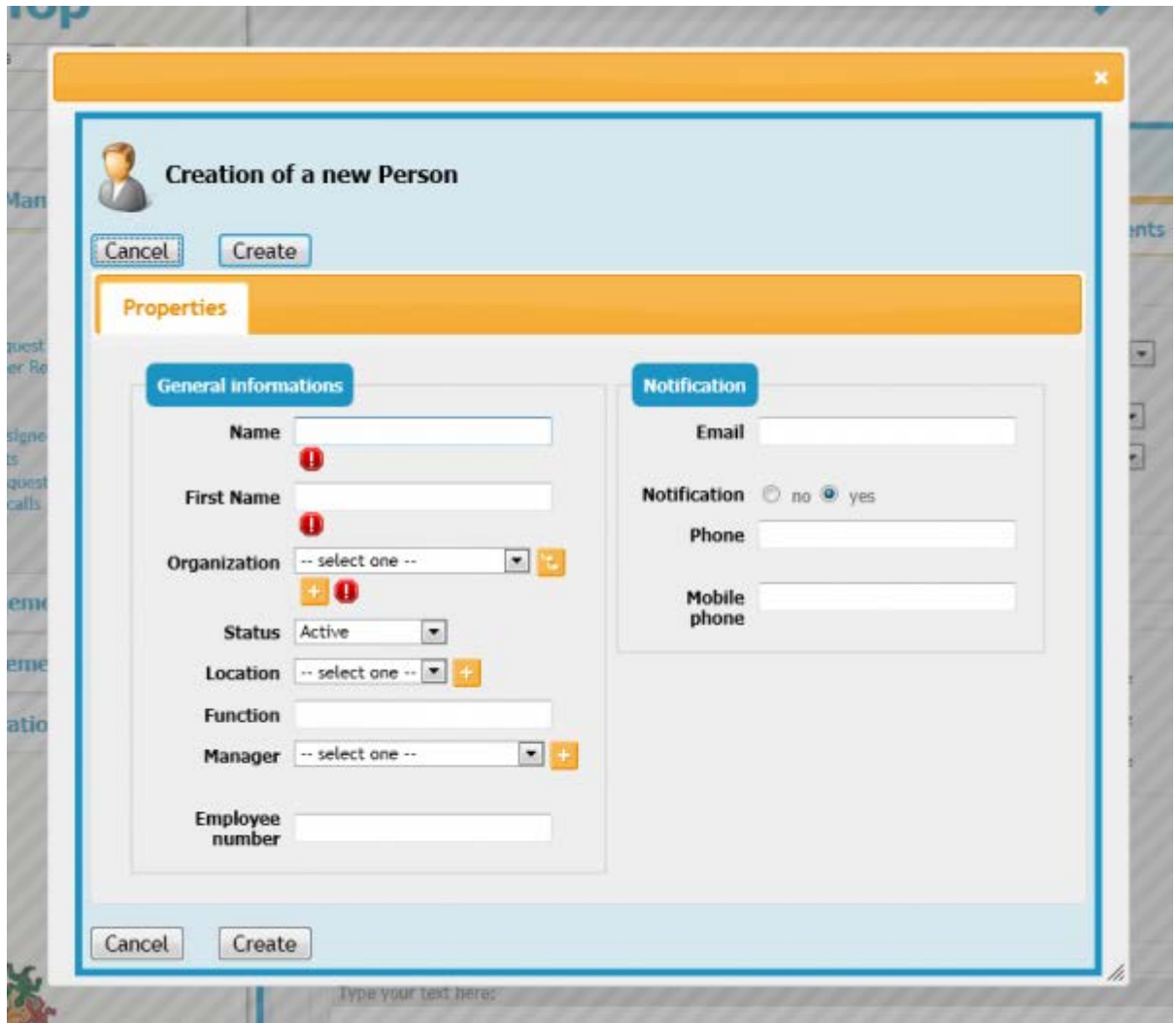
Note the small red exclamation mark icon (❗) next to the “First Name”. This icon appears when a mandatory field is left blank, or when a field does not follow the expected format for the field (for example for an email address). The modifications to the object can only be saved (using the “Apply” button) if all the fields are properly filled.

For some of the fields, the value is not a free-text but instead must be picked from a drop-down list:

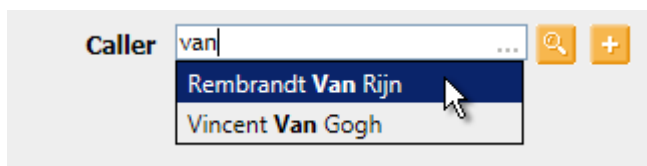


The “tree button” (🌳) is available for values that are organized as a hierarchy.

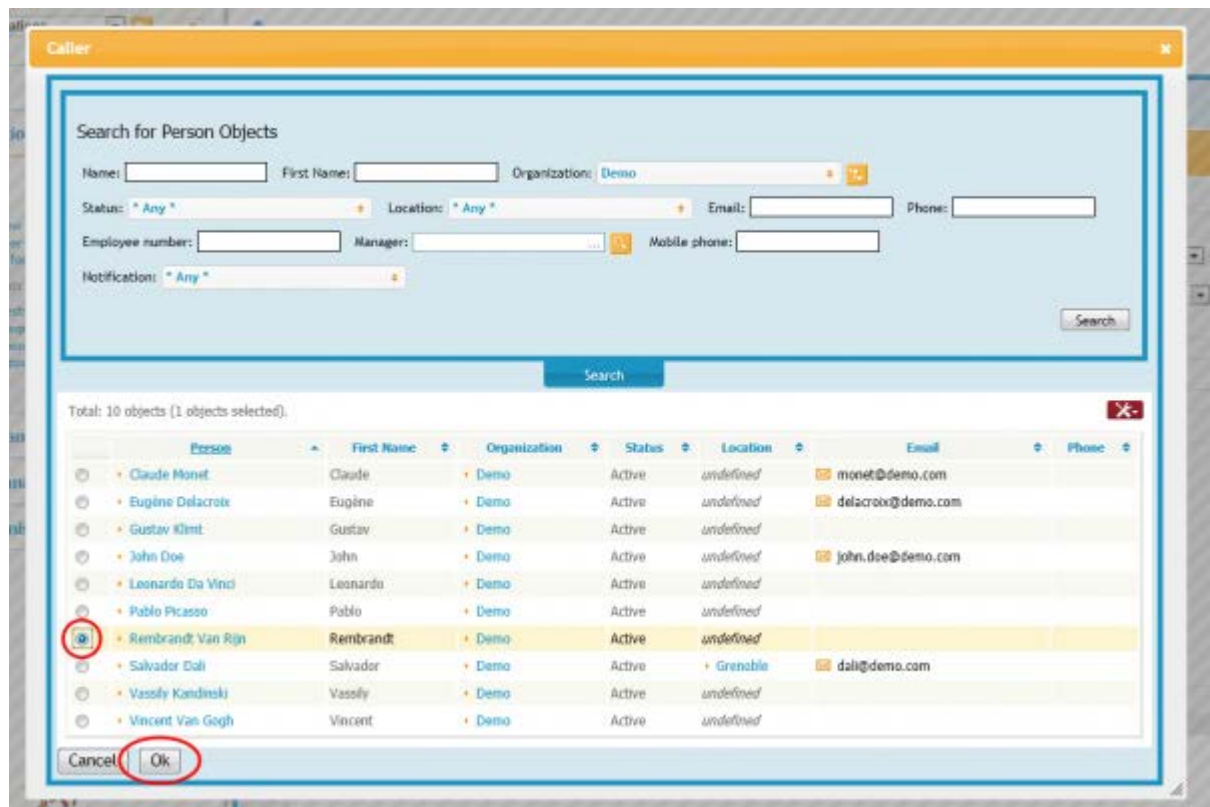
The “plus button” (+) is a shortcut to create an object and add it into the list. The button is only available for users who are allowed to create this type of object. For example when creating or modifying a ticket, clicking on the (+) button of the field “Caller” displays – as a popup dialog – the form to create a new Person:



When the number of possible values for a given field exceeds a configured value (by default 50), the drop-down list is replaced by an *autocomplete* field, as shown below:



Type at least three letters to trigger the search and pick from the list of objects matching the typed letters, or use the magnifier button (🔍) to open a searchdialog:



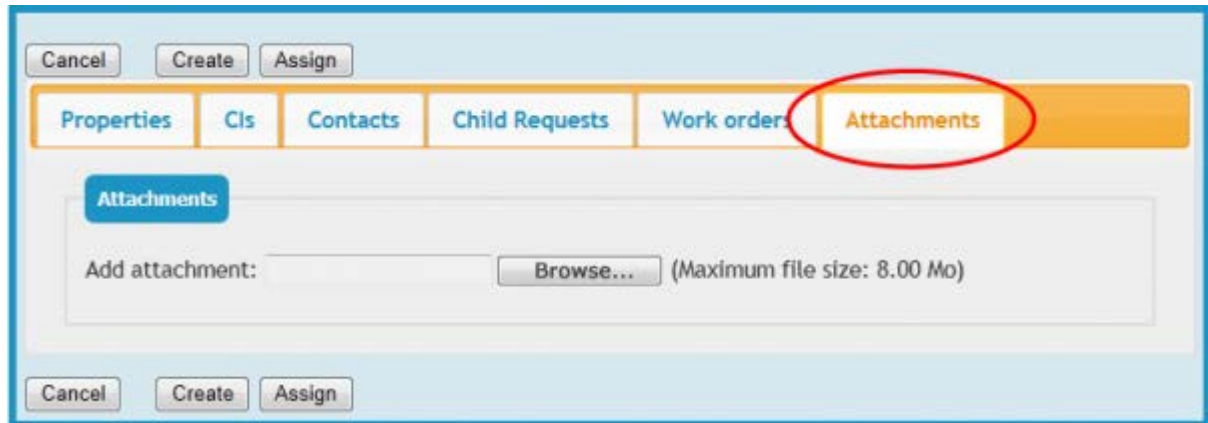
The search dialog lists all the objects, but you can use the form at the top to narrow the search before selecting an object and clicking Ok to return to the main form.

Handling Tickets Attachments

Attachments allow to upload a document (any file or image) into iTOP and “attach” it to a given object in iTOP. This is very similar to email attachments.

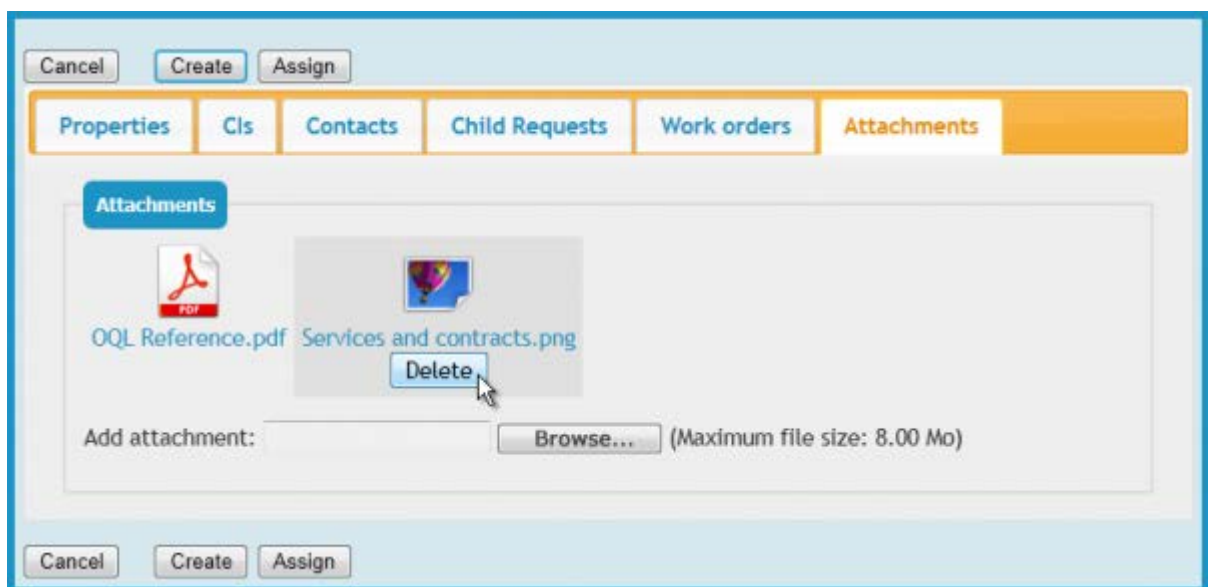
Attachments are related to the object they are attached to, and will be deleted when the object is deleted from iTOP. If you want to upload files into iTOP and have them “attached” to several objects in iTOP, then consider creating “Document” objects. Refer to [File documents](#).

To manage the attachments to a Ticket, click on the “Attachments” tab while creating or modifying a Ticket:



To upload a new attachment, click on the “Browse...” button and select the desired file. Note that the maximum size for a single uploaded file is displayed next to the “Browse...” button. If a file is bigger than this value, it cannot be uploaded into iTop. This maximum size depends on several settings on the server and can be changed only by an administrator.

Once attachments have been uploaded they are listed in the tab, with one icon per file. The name of the attachment is an hyperlink to download it.



Move the mouse above an icon to display the “Delete” button. Clicking on “Delete” will then remove the attachment from the ticket.

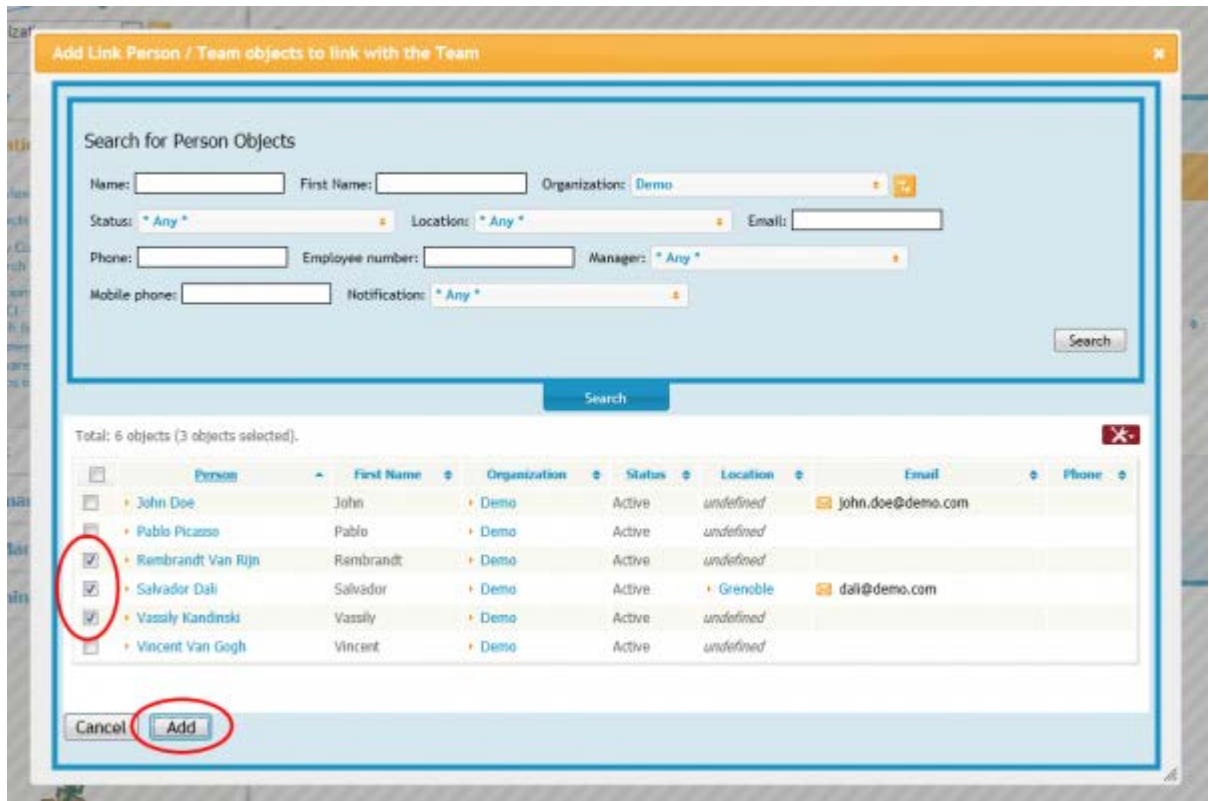
The changes to the Ticket (addition or removal of attachments) are actually performed when the “Apply” button is clicked. Clicking on “Cancel” for the Ticket form will cancel any change to the attachments.

Managing Objects Relations

In iTop most of the tabs displayed on the details of an object represent relations between objects. All these relations are managed in the same manner. For example the form to manage the members of a “Team” looks like as shown below:

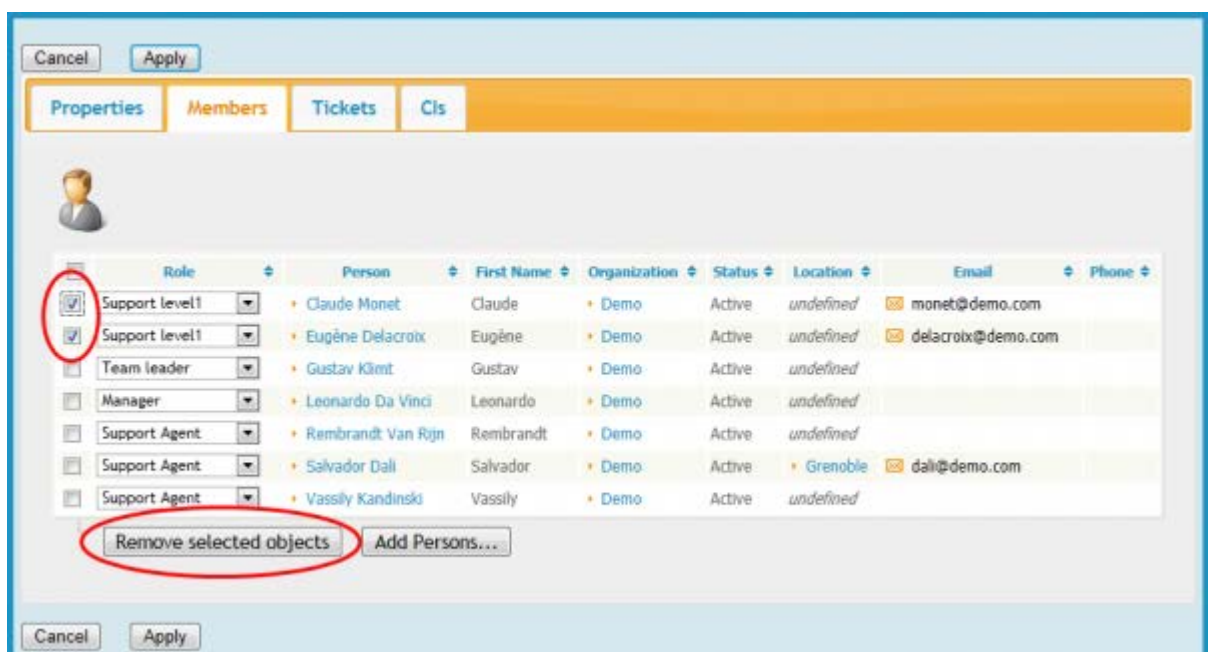
	Role	Person	First Name	Organization	Status	Location	Email	Phone
<input type="checkbox"/>	Support level1	Claude Monet	Claude	Demo	Active	undefined	monet@demo.com	
<input type="checkbox"/>	Support level1	Eugène Delacroix	Eugène	Demo	Active	undefined	delacroix@demo.com	
<input type="checkbox"/>	Team leader	Gustav Klimt	Gustav	Demo	Active	undefined		
<input type="checkbox"/>	Manager	Leonardo Da Vinci	Leonardo	Demo	Active	undefined		

In order to add members to the team, click on the ” ” button at the bottom. This displays – as a popup – the search form to select Persons. Check the desired persons in the list and click “Add” to go back to the main form.



You can narrow the search using the criterias at the top, then click on the button to refresh the list.

To remove objects from the relation, check the corresponding line in the form, then click on the “Remove selected objects” button at the bottom.



Note that removing objects from the relation does not actually delete these objects from iTop. Only the *relation* between the objects is removed.

Actions

The actions are the means to modify the objects in iTop. Actions can be executed:

- from a list of objects (Refer to the Chapter [Managing Lists](#)), in which case the selected action is applied to all the objects in the list
- from the details of an object

The actions buttons are only displayed to users with enough rights to execute them.

The standard actions in iTop are:

New

This action is used to create a new object of the same type as the object currently displayed. When clicking on “Create...”, the creation form of the object is displayed.

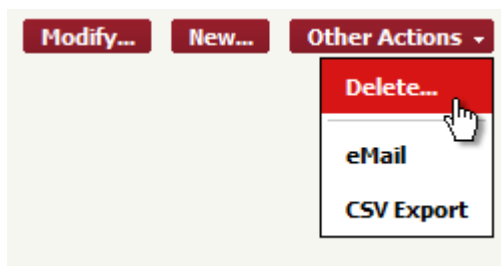
Some of the fields may be pre-filled automatically, depending on the context. For example, if the context is set to the organization “Demo”, clicking on “Create...” to create a new Person will display the form with the organization prefilled to “Demo”.

Modify

This action displays the form to update an object. Both creation and modification forms are very similar, except that when modifying an object, the values in the form are obviously prefilled with the current values of the object being modified.

Delete

The “Delete” action is located in the “Other Actions” popup menu:



This action is used to permanently delete an object from iTOP. In order to guarantee the consistency and integrity of the data in iTOP, deleting an object may also affect other objects. Depending on the rules defined in the data model, other objects may be modified or deleted automatically, or the deletion may not be possible until some depending object are manually deleted.

In any case, a confirmation screen listing all the impacted objects, is displayed.

Deletion of Paris

3 objects/links are referencing Paris

To ensure Database integrity, any reference should be further eliminated

Class	Object	Consequence
Location	Paris	
Person	Claude Monet	will be automatically updated (reset: Location)
Person	Eugène Delacroix	will be automatically updated (reset: Location)
Person	Pablo Picasso	will be automatically updated (reset: Location)

Please confirm that you want to delete [Paris](#).

For example, if you want to delete the whole organization “Demo”, the following confirmation screen is displayed:

Deletion of Demo

47 objects/links are referencing Demo

To ensure Database integrity, any reference should be further eliminated

Class	Object	Consequence
Organization	Demo	
Location	Bordeaux	Must be deleted manually
Location	Grenoble	Must be deleted manually
Location	Paris	Must be deleted manually
Person	Claude Monet	Must be deleted manually
Person	Eugène Delacroix	Must be deleted manually
Person	Gustav Klimt	Must be deleted manually
Person	John Doe	Must be deleted manually
Person	Leonardo Da Vinci	Must be deleted manually
Person	Pablo Picasso	Must be deleted manually
Person	Rembrandt Van Rijn	Must be deleted manually
Person	Salvador Dali	Must be deleted manually
Person	Vasily Kandinski	Must be deleted manually
Person	Vincent Van Gogh	Must be deleted manually
Link SLA / SLT	1 1	
Link SLA / SLT	1 2	
iTop user	john.doe@demo.com	will be automatically updated (reset: Contact (person))

Please perform the manual operations listed above prior to requesting the deletion of this object

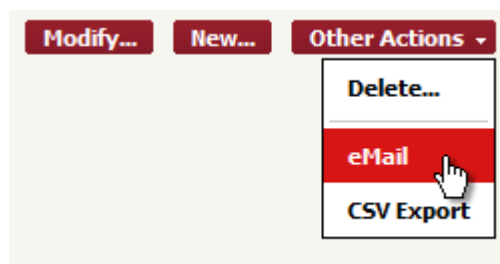
<< Back Delete!

In this particular case, iTop detects that there are several Persons belonging to this Organization. Since the definition of the data model demands that a Person belong to an Organization and that the deletion of a Person is not automatic, the “Demo” Organization cannot be deleted while there are Persons belonging to it.

This is why the “Delete!” button is grayed out. In order to delete the “Demo” Organization, the Persons must be processed first, either by deleting them or by assigning them to a different Organization.

eMail

The “email” action is located in the “Other Actions” popup menu:



This action is for creating a new eMail message containing a link to the selected object in iTop. The email is created and sent from the client mail program configured on the end-user's computer.

The recipient of the message will get an URL to navigate to the details of the object by clicking on the link, but she/he must have an iTop account to view the information, since she/he will be prompted to authenticate for viewing the page.

CSV Export

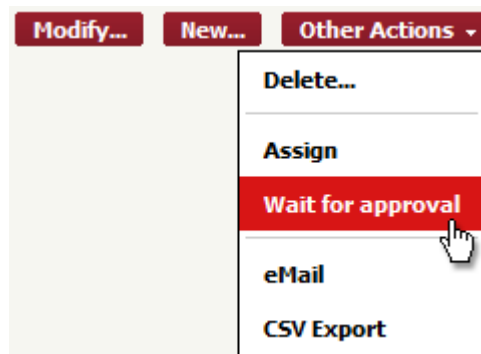


The CSV export of one object is similar to the [CSV export of a list](#), except that there is obviously only one line of data in the resulting export.

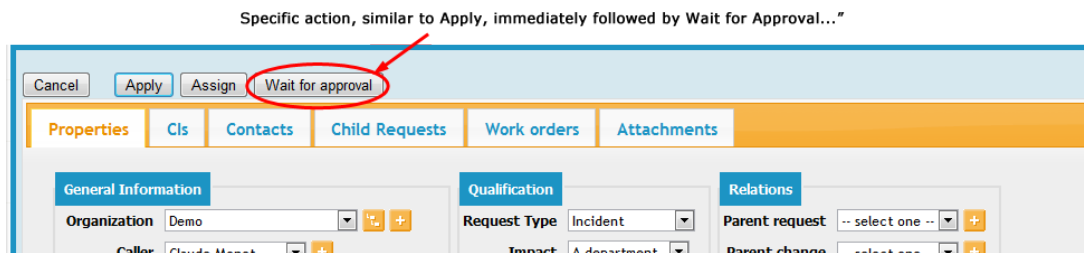
Ticket Specific Actions

Some objects managed in iTop follow a specific life-cycle that correspond to a specific process. This is the case, for example, for the different tickets managed in iTop (incident tickets, change management tickets, etc.). For these objects, additional actions are available, corresponding to process execution workflow.

Life-cycle actions are available either as extra menu items in the “Other Actions” popup menu:



Or directly as extra buttons in the modification form for the object:

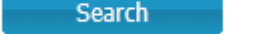


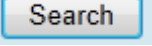
In the latter case, clicking on the “Wait for Approval” button is strictly equivalent to clicking on “Apply” to save the current modifications of the object, then selecting “Wait for Approval” from the “Other Actions” drop-down menu.

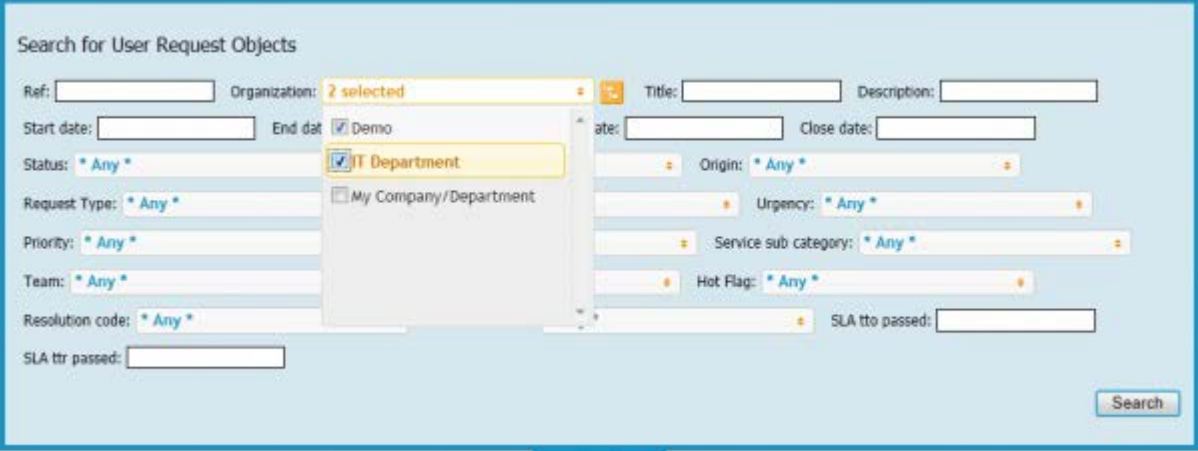
The actions available on each object depend on:

- The life-cycle of the object (each type of object may have a different life-cycle)
- The current state of the object (not all actions are possible in all states)
- The user-rights as defined by her/his profile(s): some actions are restricted to a given profile.

Search

A search tab () is present in many places in iTop. Clicking on this tab toggles the display of a multi-criteria search form.

Inside the form, the search button () is used to launch the search once the criteria have been filled.



The screenshot shows a search form titled "Search for User Request Objects". It contains several input fields and dropdown menus for search criteria. The criteria include: Ref, Organization (set to "2 selected"), Title, Description, Start date, End date, Status (set to "Any"), Request Type (set to "Any"), Priority (set to "Any"), Team (set to "Any"), Resolution code (set to "Any"), SLA ttr passed, Origin (set to "Any"), Urgency (set to "Any"), Service sub category (set to "Any"), and Hot Flag (set to "Any"). A "Search" button is located at the bottom right of the form. A dropdown menu is open over the "Organization" field, showing "IT Department" selected and "My Company/Department" as an option.

All the criterias of the search form are combined together using a AND operator. This means that when searching for Tickets, if you specify “Demo” as the Organization and “High” as the severity, the search results will list all the Tickets of the Organization “Demo” which have a “High” priority (Organization = Demo **and** Priority = High).

Date Fields

The format for dates used by iTop is always the same: it is the year on 4 digits, followed by a dash, followed by the month expressed on 2 digits, followed by a dash and finally the day on 2 digits. (In short: YYYY-MM-DD)

For the fields holding a date and a time, the format is the same but the date is followed by a space then the hours on 2 digits (24 hours format) followed by a colon (:) followed by the minutes on two digits followed by a colon (:) and the seconds on two digits. (In short: YYYY-MM-DD hh:mm:ss).

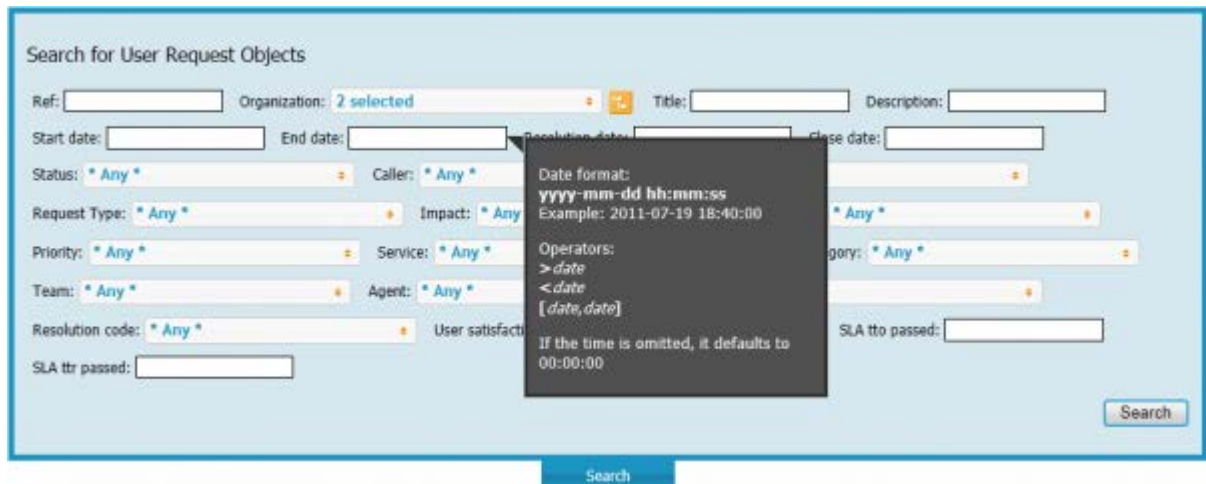
Shortened dates and times:

The “time” part, but also the day or even the month information can be omitted for the date expression, in which case the resulting date will be equivalent to the beginning of the period. For example searching for >2012-12 is equivalent to searching for >2012-12-01 00:00:00. Searching [2011,2013] will match all dates in 2011 and 2012, since it will search for [2011-01-01 00:00:00,2013-01-01 00:00:00]

When a field contains a date, some special operators are allowed. Such operators are specified by typing them directly in the search field:

Operator	Meaning	Example
<	Strictly less than	Type <2012-01-01 to search for any date before the first day of 2012
>	Strictly greater than	Type >2011-12-31 to search for any date after the last day of 2011
[date1,date2]	In the range	[2012-01-01, 2012-01-31] To search for any date in January 2012 (including the first and last day of the month)

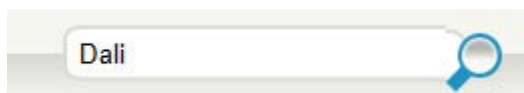
When placing the pointer of the mouse over a date field, a tooltip with some explanations appears:



When a search field is a **date and time** field, remember to use the operators to specify your search. In fact searching for tickets which “Close date” is “2012-11-01” will probably not return any match, since it is quite unlikely to find many tickets which were closed exactly on 2012-11-01 at 00:00:00. So, to find all tickets closed on the first of November use the syntax: **[2012-11-01,2012-11-02]**

Global search

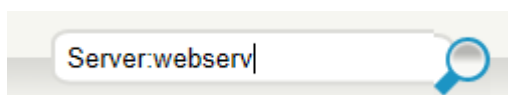
The “Global search” feature is located at the top right of all iTop pages.



The global search searches for the given string of text inside all the objects in iTop. To launch the search enter the text to search and click on the magnifier icon or press the ENTER key of your keyboard.

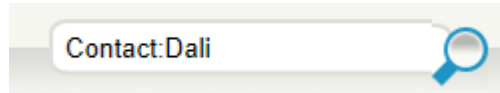
The search results are displayed by groups: all the matching objects of the same class are grouped together in one table.

Since the global search searches in all the objects of the iTop database it can become quite slow when the number of object increases, however you can speed-up the search by limiting its scope to a given class of objects. The syntax to specify the scope of the global search is the following: **class_name: text_to_search**.



Searching for Server:webserv will search for all server objects containing the text “webserv” in any of their fields.

You can also specify as a scope a class that has subclasses. For example:



Searching for Contact:dali will search for all Teams and Persons containing dali in any of their fields.

The global search is *not* case sensitive. Searching for Dali, dali or DALI will give identical results.

Managing Lists

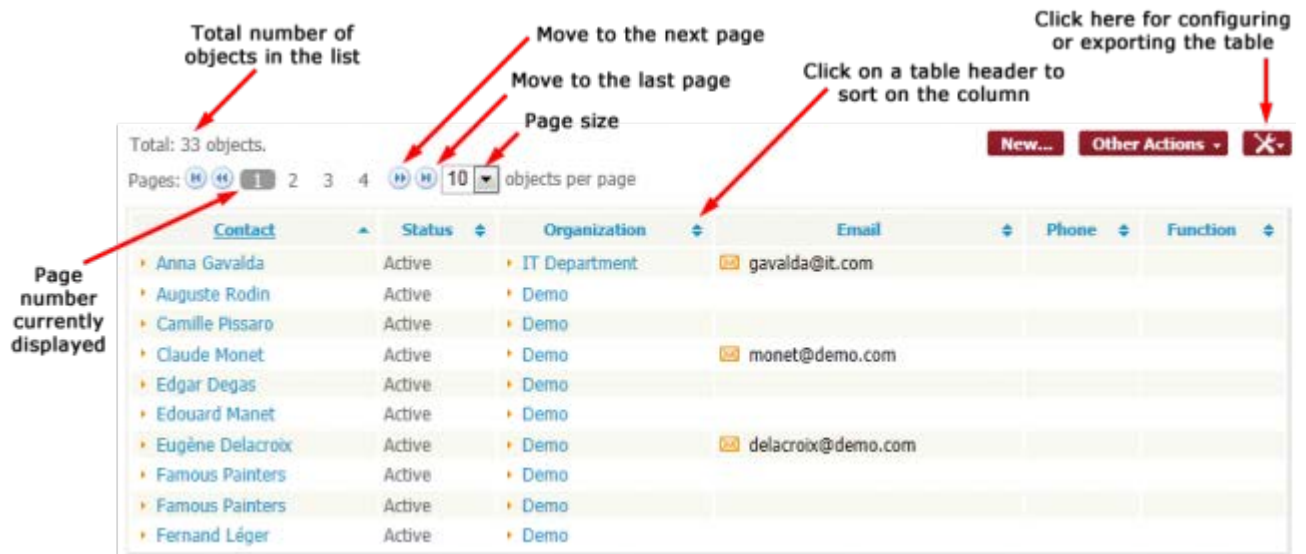
In iTop, lists are quite common: many menu items point to lists, the search results displays lists as well as the global search. Once a list of objects is displayed, the operations that can be performed on the list are always the same.

For example, below is a list of Contacts:

Total: 7 objects.

Contact	Status	Organization	Email	Phone	Function
Anna Gavalda	Active	IT Department	gavalda@it.com		
Gustave Flaubert	Active	IT Department	flaubert@it.com		
Hardware support	Active	IT Department	hw@test.com		
Helpdesk	Active	IT Department			
Network support	Active	IT Department	nw@test.com		
System & application support	Active	IT Department			
Victor Hugo	Active	IT Department	hugo@it.com		

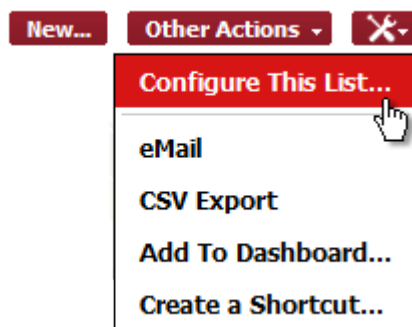
If a list contains more than a (configurable) number of elements, it is displayed as a *paginated* list:



Toolkit menu

When a list of objects is displayed in iTop, a certain number of operations can be performed on the list itself (without modifying the objects in iTop). These operations are executed through the toolkit popup menu at the top-right of the list.

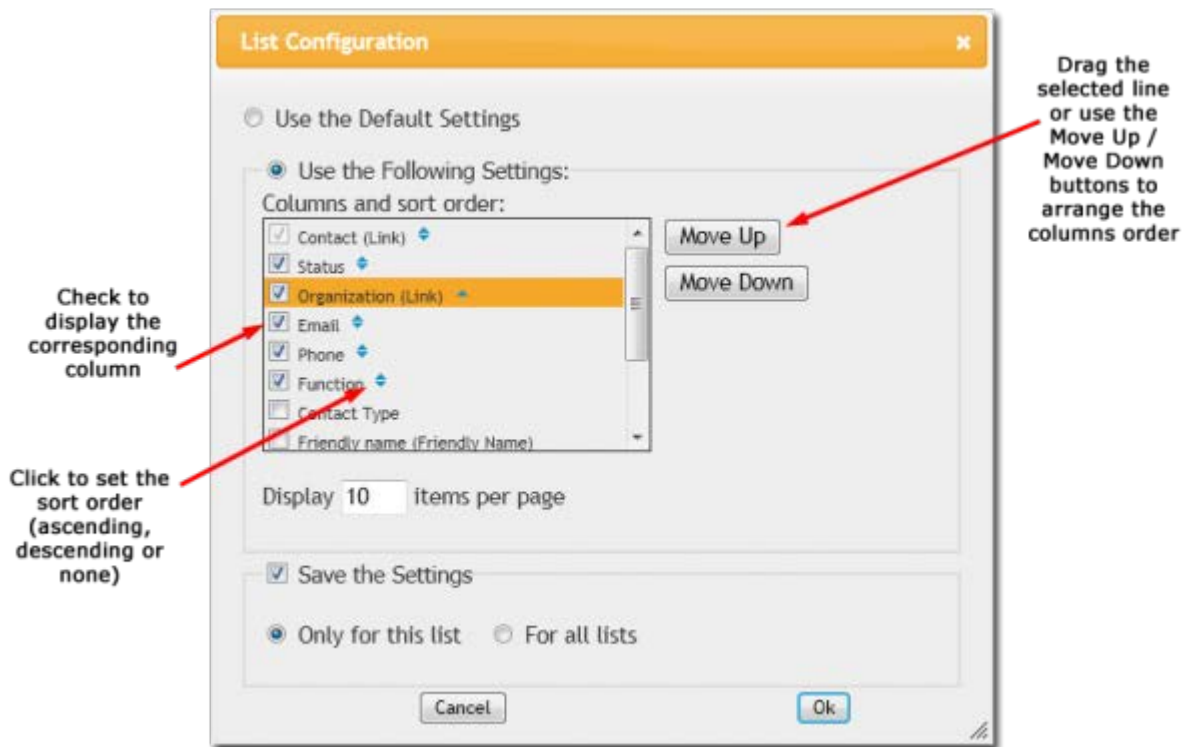
Configure This List



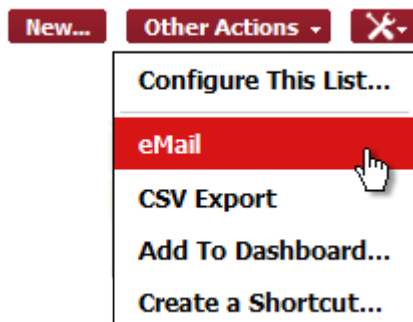
The first possible operation consists in configuring the appearance of the list. You can choose:

- Which columns are displayed and in which order
- How the list is sorted
- How many items will be displayed at the same time (see paginated lists above)
- To which list this configuration will apply: to all lists of such objects or only to this specific list

All this configuration is done through the popup dialog:

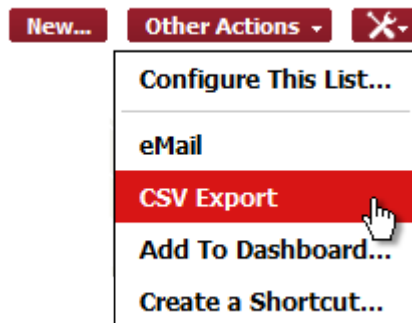


eMail

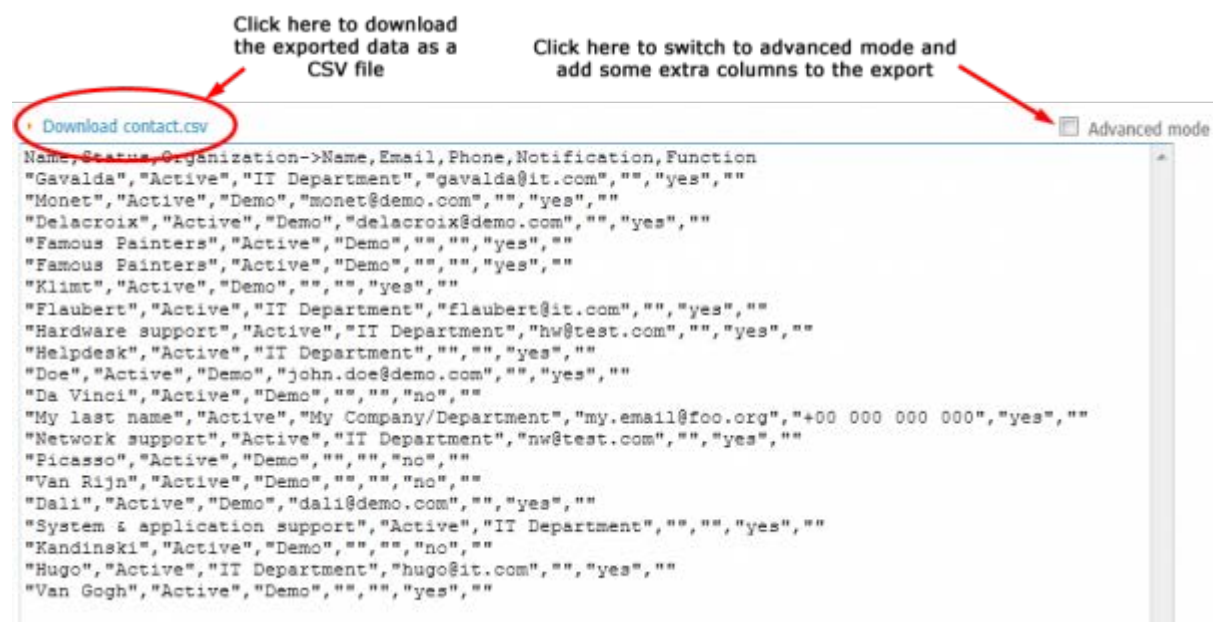


This action is similar to the “eMail” action on the details of an object, except that the hyperlink inserted into the message points to the specified list of objects.

CSV Export



The CSV export operation displays a page containing a text/CSV representation of the objects in the list. This is useful for importing the data in a third party application or to process the data in a spreadsheet before re-importing them into iTop.



You can then either:

- Use the link at the top-left to download the data as a CSV file, then open this file in your favorite spreadsheet application
- Copy/Paste the data from the text area (use CTRL-A to select all) then paste it into your spreadsheet

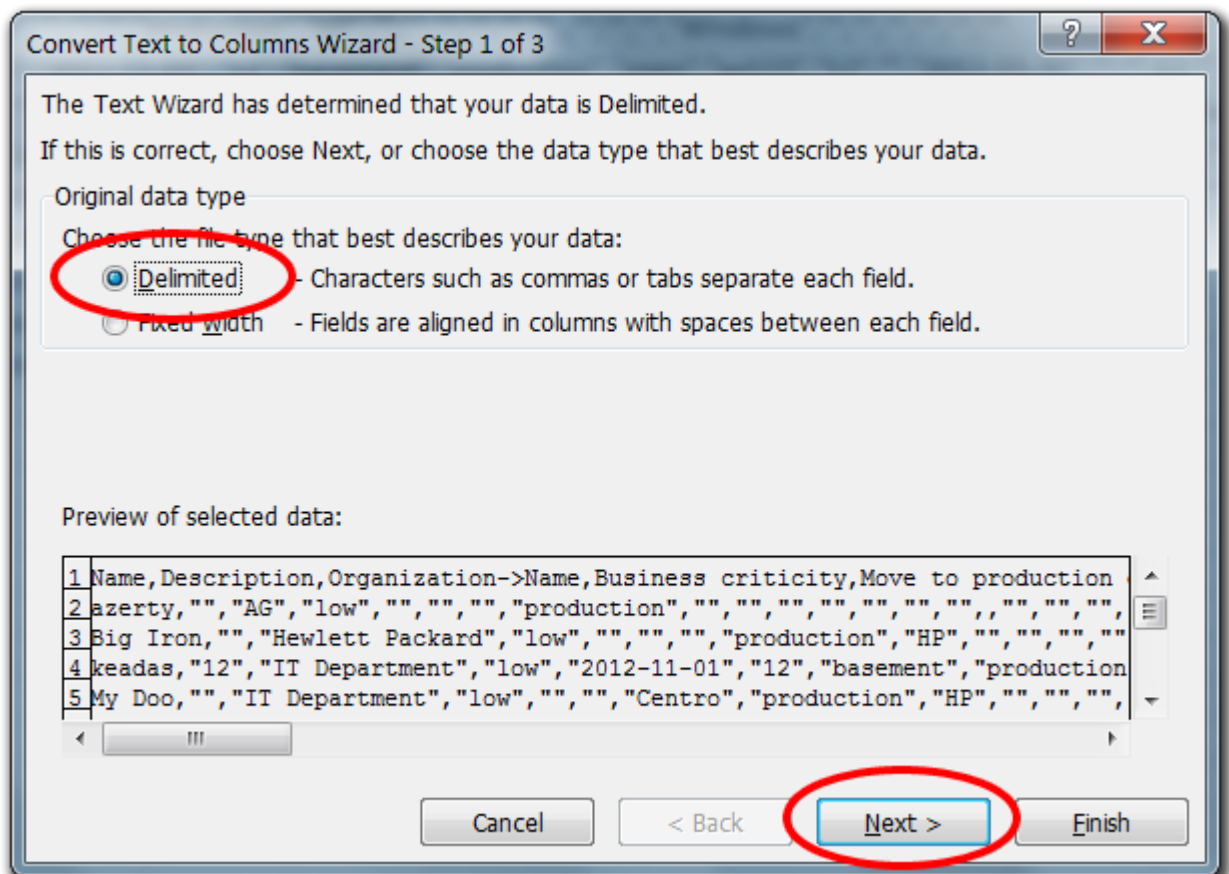
How to paste CSV data in Excel 2007/2010

If you use copy/paste to import CSV data into Excel, all the data are put in just one column. Fortunately this is easy to change.

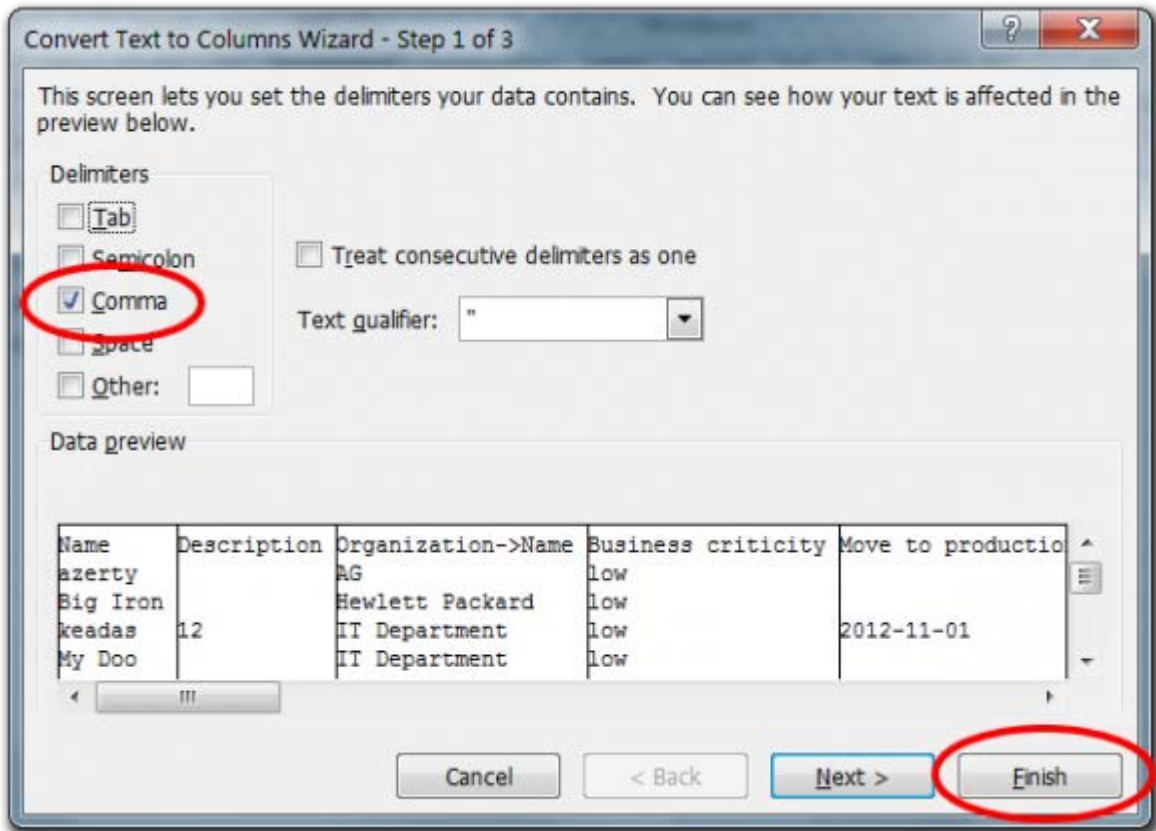
In the “Data” tab of Excel, click on the “Text To Columns” icon:



The following dialog wizard appears:



Select “Delimited” and click “Next >”.

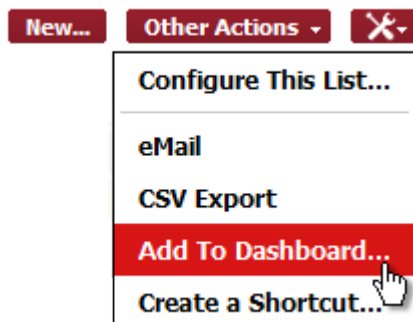


Select “Comma” and click “Finish”.

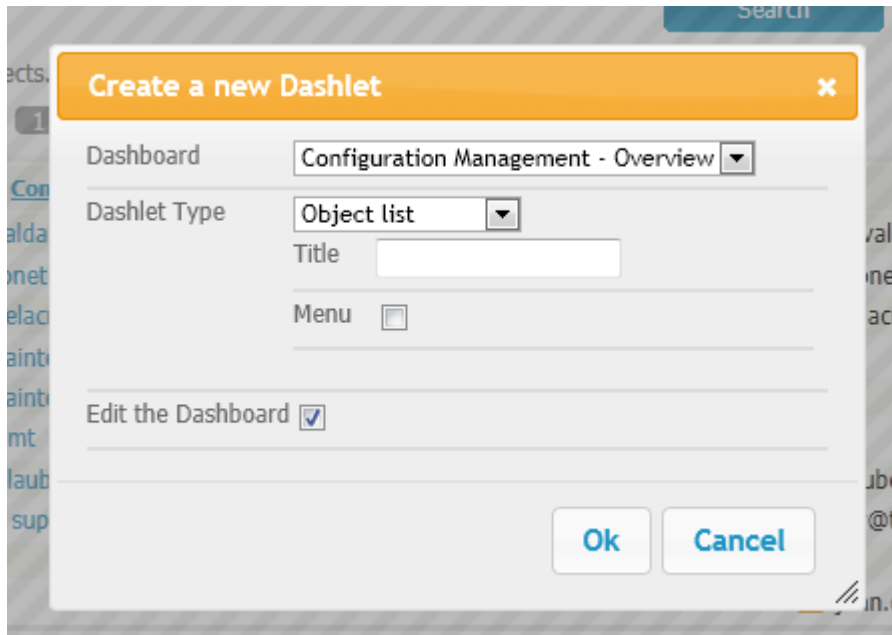
The next time you copy/paste CSV data in the same session (without closing and restarting Excel), Excel will automatically perform the text-to-columns conversion with the same settings.

Add To Dashboard

Every result displayed as a list can be added to one of the editable dashboards. Click on the menu “Add to Dashboard...” :



Then select the dashboard to which the list will be added and the type of “Dashlet” to use:



The image shows a dialog box titled "Create a new Dashlet". The dialog contains the following fields and options:

- Dashboard:** A dropdown menu with the selected value "Configuration Management - Overview".
- Dashlet Type:** A dropdown menu with the selected value "Object list".
- Title:** An empty text input field.
- Menu:** A checkbox that is currently unchecked.
- Edit the Dashboard:** A checkbox that is currently checked.

At the bottom right of the dialog, there are two buttons: "Ok" and "Cancel".

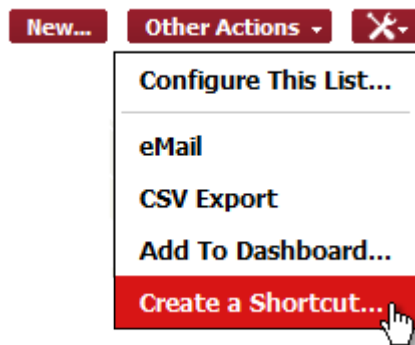
A list can be added to a dashboard either as:

- A plain list of objects
- A pie chart (By grouping the objects on a given field)
- A barchart (By grouping the objects on a given field)
- A table with the count of objects, grouped on a given field

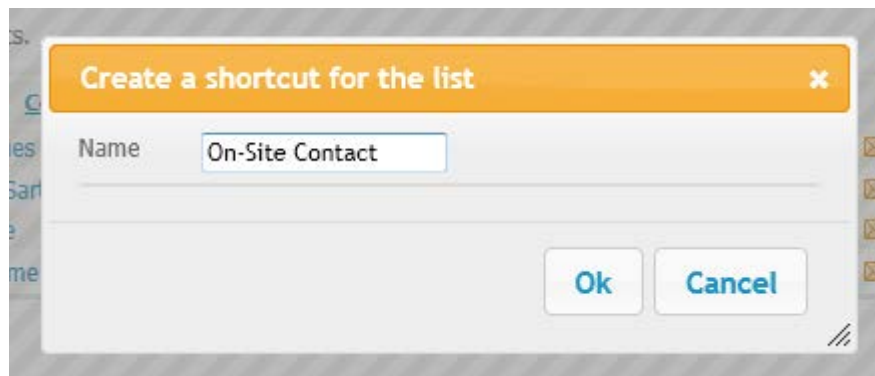
When the user presses “Ok”, the new dashlet is added at the end of the selected dashboard (by adding a new cell after the last used cell). If “Edit the dashboard” is checked, then the modified dashboard is immediately opened in the dashboard editor.

Refer to [Editing Dashboards](#) for information about how to customize the resulting dashboard.

Create a Shortcut



When prompted, enter the name for your new shortcut (this is the name that will appear under “My Shortcuts” in the menu), and click Ok.

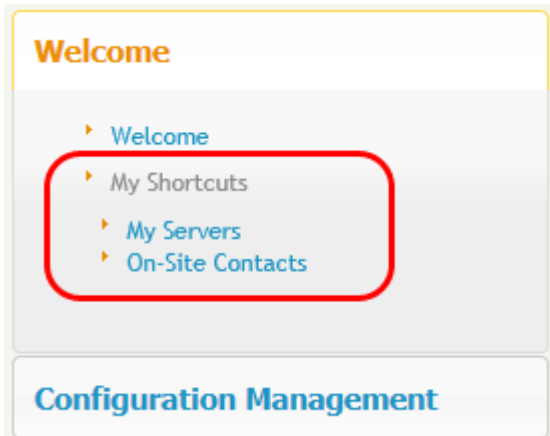


The new shortcut is then added to the menu.

Shortcuts

Shortcuts are a mean to easily navigate to a particular list of objects in iTop. You can think of it as a kind of dynamic bookmark, since the “bookmarked” list is defined by its search criterias.

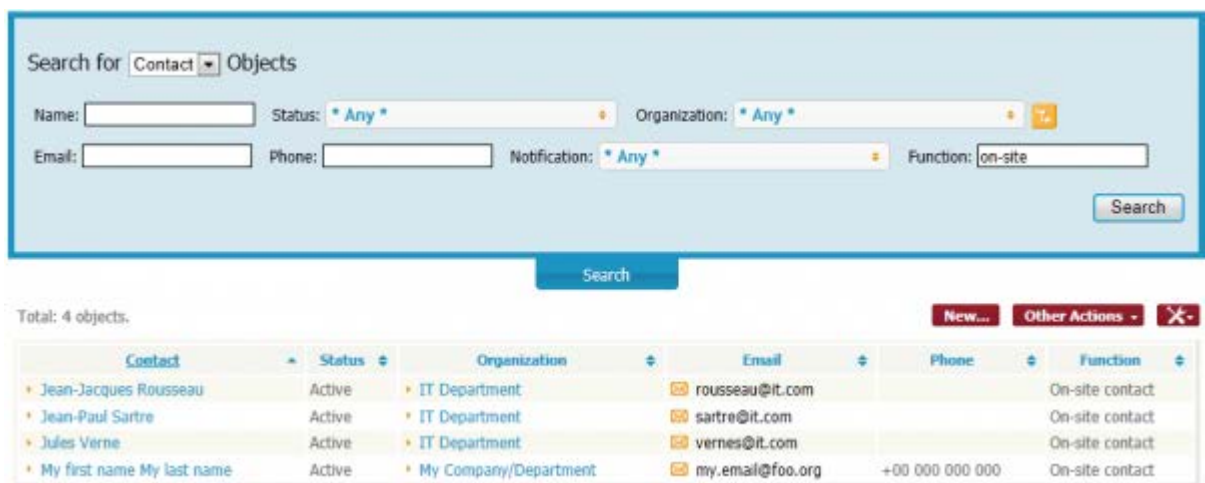
Shortcuts appear as extra menu items under the “My Shortcuts” menu in the “Welcome” drawer of the explorer menu on the left of iTop pages.



Creating a new Shortcut

To create a new shortcut, start by searching the objects you want to “bookmark” .

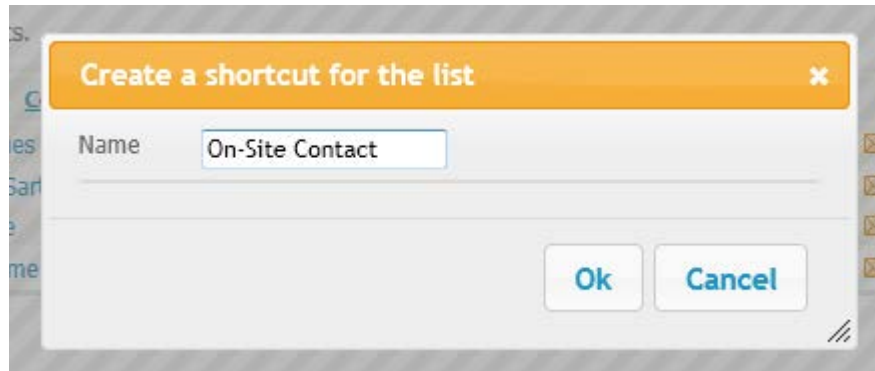
For example, imagine that you want to have an easy access to all persons tagged as “On-Site Contact” . Search for contacts having “on-site” in their “function” :



Then click on the “toolkit” popup menu and select “Create a Shortcut...” :



When prompted, enter the name for your new shortcut (this is the name that will appear under “My Shortcuts” in the menu), and click Ok.



The new shortcut is then added to the menu.

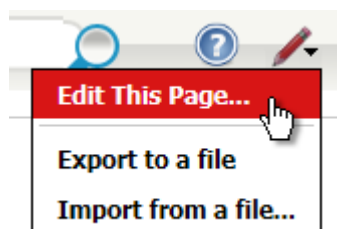
Managing shortcuts

To rename or delete shortcuts, go to the [User Preferences](#) page.

Editing Dashboards

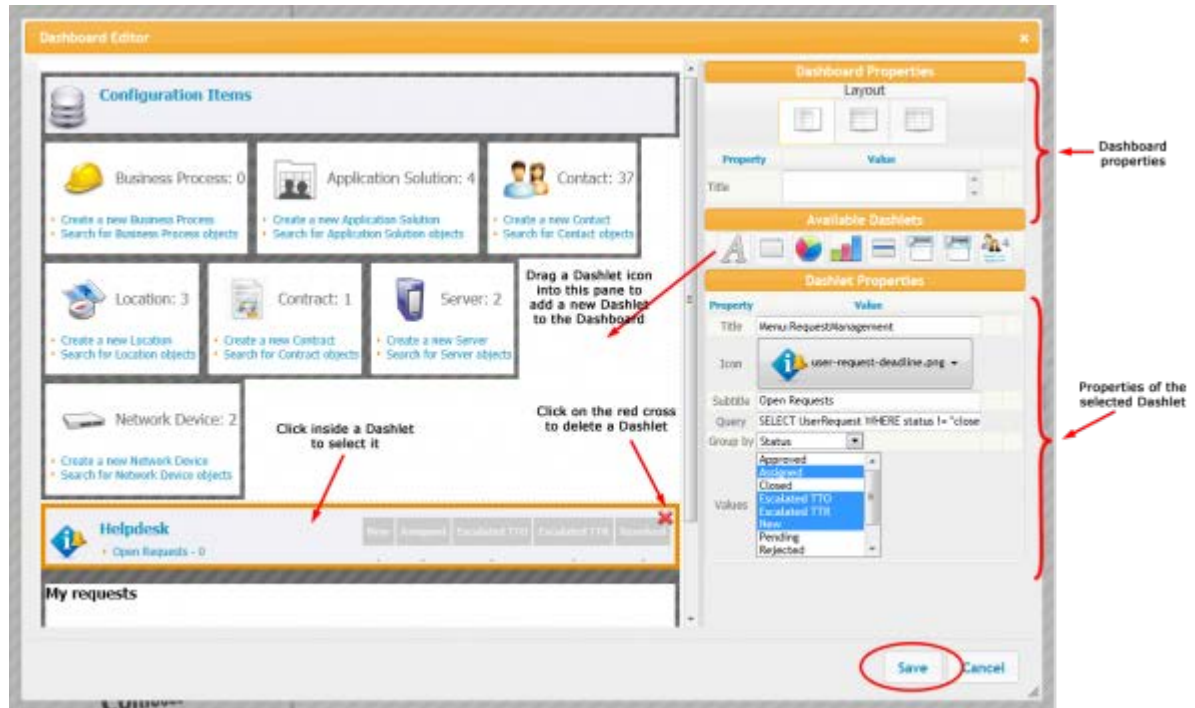
Some of the pages in iTop are “dashboards”. Dashboards are used to display on the same page information about different iTop objects. Most of “overview” pages, as well as the “welcome” page are dashboards. In iTop 2.0, each user can configure her/his own dashboards by editing the existing dashboard pages. It is not possible to create new dashboard pages.

When a page is an editable dashboard, the small “Pen” drop-down menu appears at the top-right of the page, next to the “Log-off” menu.



To edit the current page, select “Edit this page...”.

After a few seconds a popup dialog appears containing the “dashboard editor” dialog:



A dashboard is made of building blocks named after “dashlets”.

A dashboard itself arranges the display of the dashlets it contains. Therefore a dashboard has only two properties:

- A layout (one, two or three columns)
- An optional title

The layout determines how the dashlets are arranged on the page: it determines a grid, with each dashlet being assigned to one cell of the grid. When the layout is changed, the cells (as well as the dashlets inside the cells) are re-organized to produce the desired display.

One column layout

Cell 1
Cell 2
Cell 3
Cell 4
Cell 5
Cell 6

Two columns layout

Cell 1	Cell 2
Cell 3	Cell 4
Cell 5	Cell 6

Three columns layout

Cell 1	Cell 2	Cell 3
Cell 4	Cell 5	Cell 6

To edit the properties of a dashlet click on it in the left part of the dialog. An orange border appears around the selected dashlet, and the properties of the dashlets are displayed on the right part of the dialog. to modify the appearance of the dashlet, simply modify the properties on the right and see the dashlet change to reflect your modifications. To remove the selected dashlet from the dashboard, click on the red cross at the top-right of the selected dashlet.

Since some dashlet contain clickable links, click next to the grey border of the dashlet to select the dashlet without activating a link.

To add a new dashlet to the dashboard, drag one of the dashlet icons into the desired area of the dashboard, then adjust the properties on the right to finalize your dashboard.

You can also create a new dashlet from any list of iTop objects. See [Managing Lists](#) for more information about how to achieve this.









When you are done with editing, click on “Save” to save your modifications and go back to the iTop page.

To undo all modifications performed since clicking on “Edit this page...”, click on “Cancel” .

The modifications of the dashboard apply the current user. All other users keep their own copy of the dashboard (or the default dashboard if they did not customize it)

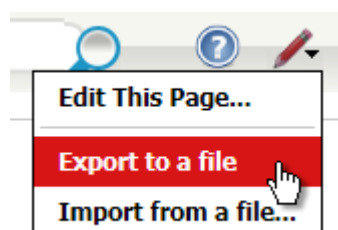
Dashlet types

The following types of dashlets are available to compose your dashboard:

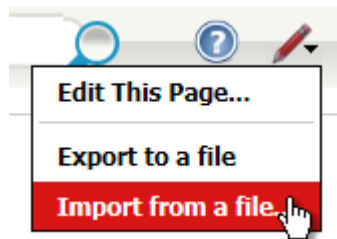
Icon	Name	Description
	Text	A free text area. Use this dashlet to add a title or a comment into a page
	Object List	A list of iTop objects, displayed as a table, like any search result
	Pie Chart	A list of itop objects, grouped on the given field and displayed as a pie chart.
	Bar Chart	A list of itop objects, grouped on the given field and displayed as a barchart.
	Group By	A list of itop objects, grouped on the given field and displayed as a table.
	Header	A grey banner with an icon on the left and a title.
	Header counts	with A grey banner with an icon on the left, title and a table showing the count of objects grouped by a given field.
	Badge	A icon with a text showing the total number of objects of the given class and two links: 'create a new...' and 'search for...'

Exporting a dashboard

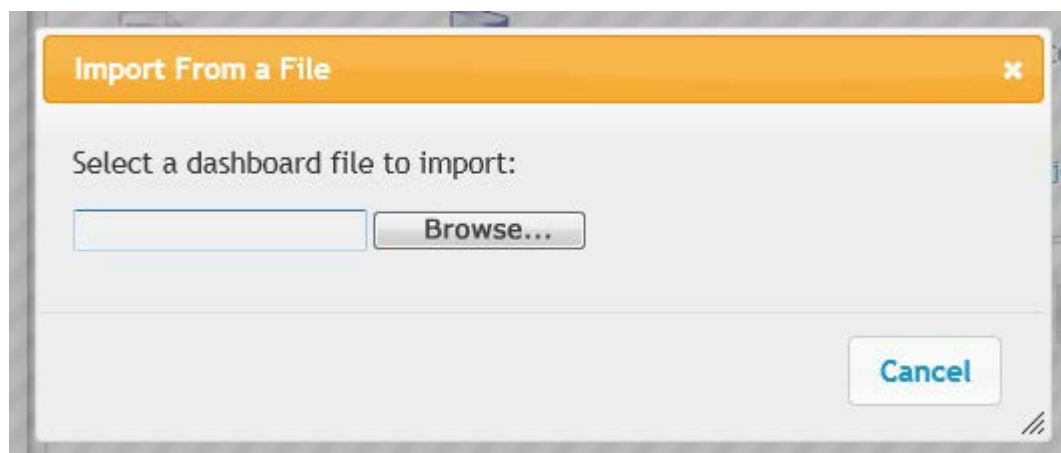
A dashboard definition can be exported to an XML file, either to archive it or to share it with other users. To export a dashboard, click on the menu item “Export to file” from the “Pen” popup menu. When prompted, enter the location where to download the exported dashboard on your computer.



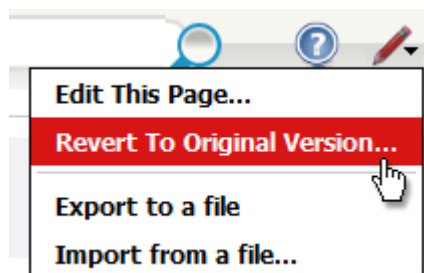
Importing a dashboard



To import a dashboard definition from an XML file, click on “Import from file” and select the XML file to upload from your computer.



Discarding the customizations



At any time, the customization of a dashboard can be discarded to go back to the original definitions (shared by all users). Simply click on “Revert to Original Version...” and acknowledge the confirmation popup dialog.

Bulk Modifications

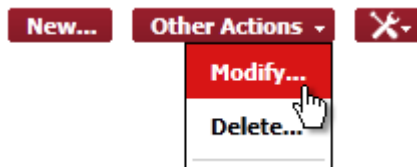
There are two ways to perform bulk modifications in iTop:

- Using the “Modify...” action on a list of objects: this is useful for data cleanup (normalization) when you want to align values within a set of objects, or for daily operations when you need to modify many objects in the same manner.
- Using the Interactive CSV Import: this is useful for re-importing a set of exported and modified data.

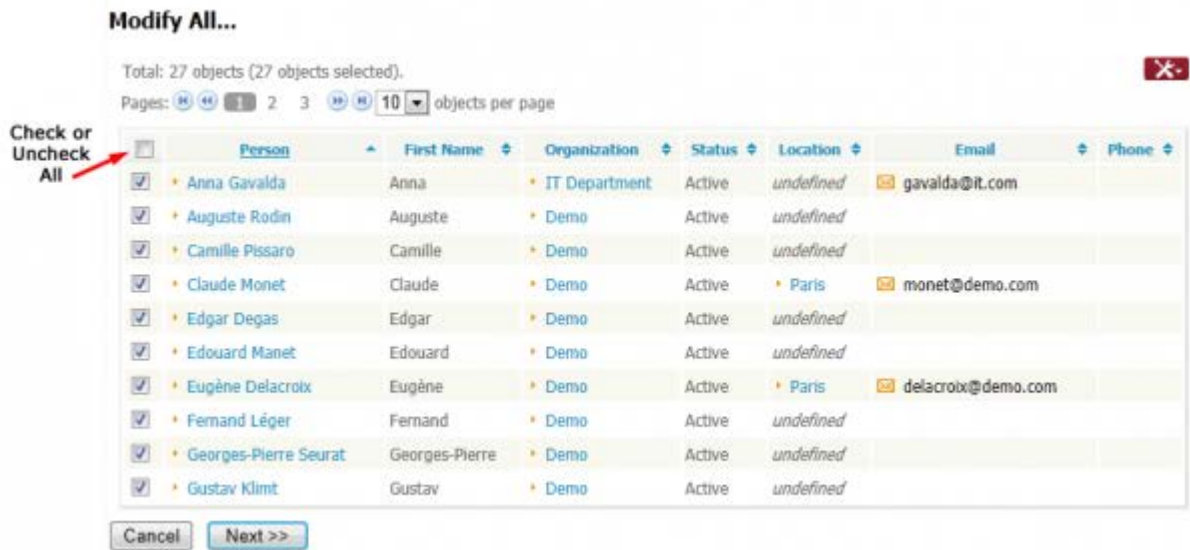
The Modify Action

iTop allows the bulk modification of a list of objects. This operation is very useful for settings a field of many objects to the same value in one operation.

- Bulk modification is possible only on a list if all the objects of the list are of the same class. For example it is not possible to perform a “Modify” on a list a Contacts, since the list may contain a mix of Teams and Persons. If you want to perform such an operation, make sure that you narrow your search to just one class of objects.
- Not all users are allowed to perform bulk operations. If the menu item is not displayed in the drop-down list, ask your administrator to check the security profile of your iTop account.
- Modifying a large number of objects (several hundreds or more) may require a lot of time to be performed. Since all interactive operations are time-limited for security reasons, contact your administrator before performing huge modifications to check if this is allowed/sustainable in interactive mode. An alternate solution for large update operations is to prepare a CSV file that will be loaded directly on the server in command-line mode.



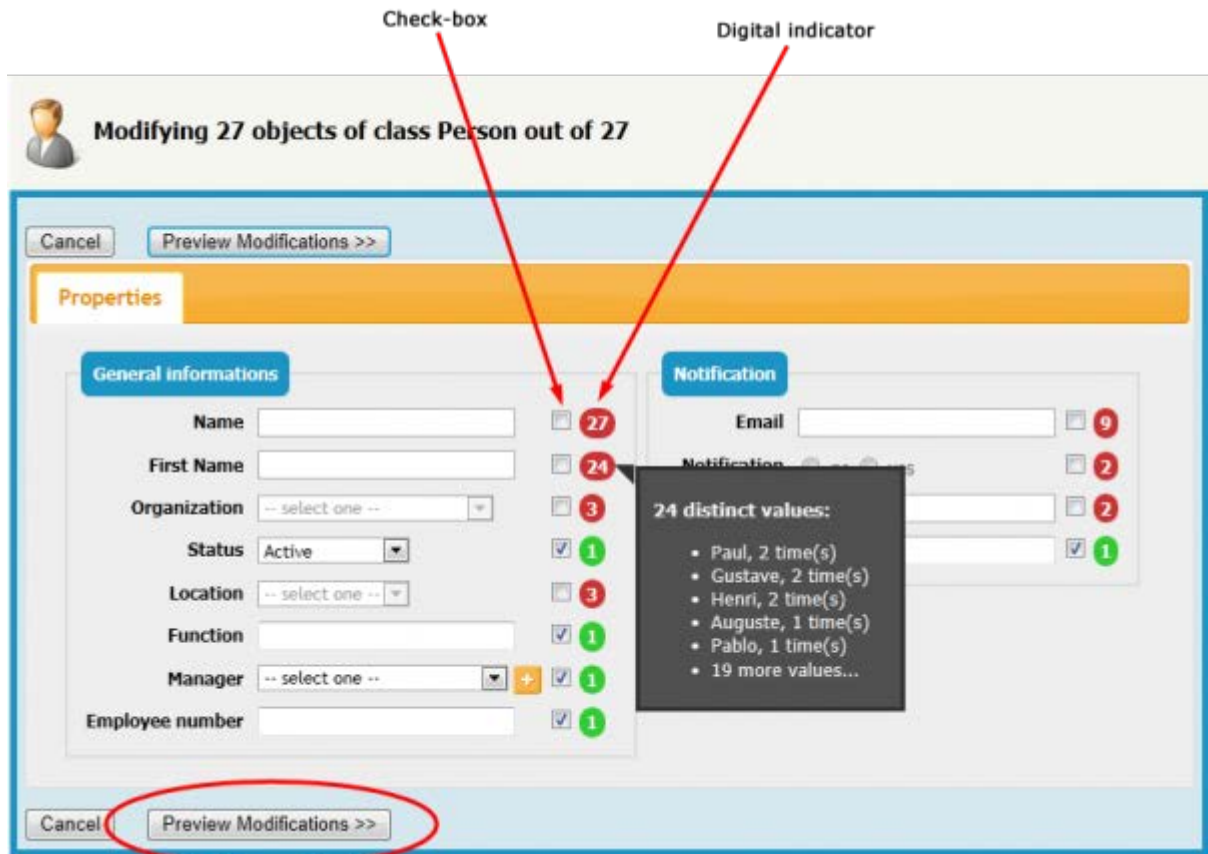
Select “Modify...” from the “Other Actions” menu item, the following page is displayed:



At this step you can select the objects to be updated, by default all of them are checked and therefore will be modified. Browse the list to check that there is no issue and click on “Next »” to proceed to the next screen.

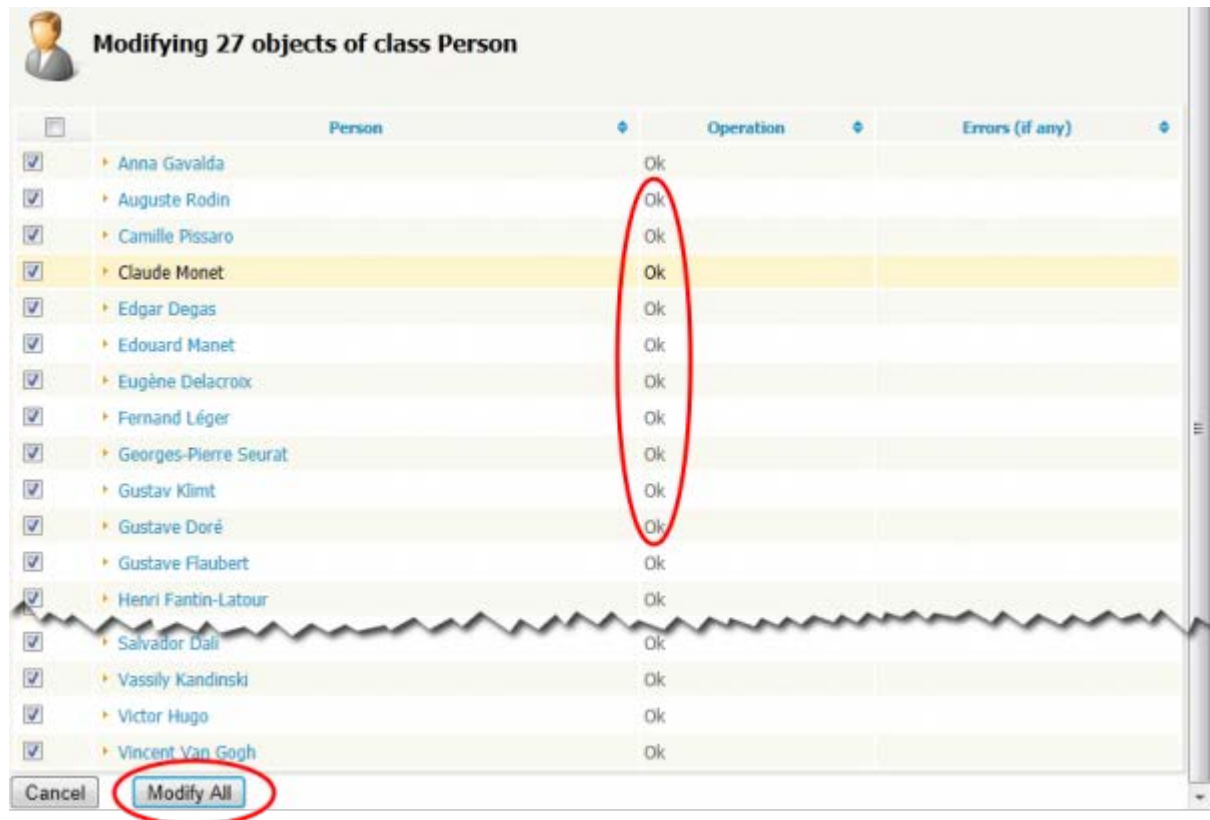
The object modification form appears with a checkbox and a numeric indicator next to each field. The indicator tells how many different values exist for this specific field among all the selected objects. If all objects have the same value for this field, the indicator is green

(1), the checkbox is checked and the field is editable. Otherwise, the indicator is red and the checkbox is unchecked. When the pointer of the mouse is positioned over a red indicator, a tooltip is displayed showing some information about the different values of the field.



Only the fields for which the corresponding checkbox is checked will be modified. All other fields will remain unchanged. By checking the checkbox in front of a “red” indicator (i.e. a field that contains several different values among the objects) you can force all the values to the same homogenous value.

Clicking on “Preview Modifications >>” displays a confirmation screen:



Inspect the list to check if any error is reported in the “Operations” column, and when ready, click on “Modify All” to actually perform the bulk modification.

Interactive CSV Import

iTop provides a powerful CSV Import feature to assist end-users (and administrators) in massively creating or updating objects in iTop.

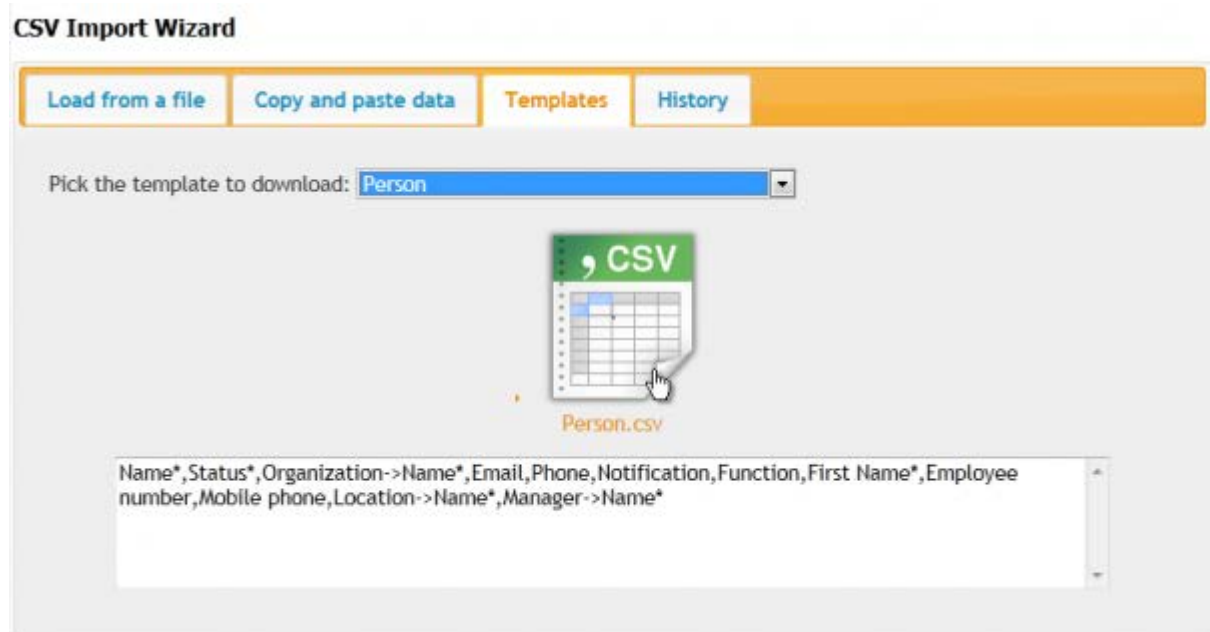
The CSV Import Wizard is launched by clicking the “CSV Import” menu in the “Data Administration” section.



Only users with “bulk modify” rights are allowed to use the interactive CSV import

CSV Templates

iTop provide CSV templates for creating/ importing any class of objects. You can either download or copy/paste the template from the third tab “Templates” of the CSV Import wizard.



Select the desired class from the drop-down list to generate the template. Then either click on the big Excel icon to download the template or copy/paste the text from the text area below the icon.

Another way to obtain a pre-filled template is to export existing objects in CSV. Refer to [Export data](#) for detailed instructions about how to perform this task.

Uploading Data

The first step of the CSV import consists in uploading the data on the server. You can either upload a file from your computer or directly copy/paste the data in the second tab of the wizard.

To upload the file from your computer, use the file upload form on the first tab of the wizard. Make sure that you also select the appropriate character set that was used for saving the file.

If the character set that you use is not available in the drop-down list, contact your iTop

administrator (this list is configurable via the `csv_import_charsets` configuration variable).

If you choose to copy/paste the data, use the second tab “Copy and paste data” of the wizard:

CSV Import Wizard

Load from a file | **Copy and paste data** | Templates | History

Paste the data to import:

Name*	First Name*	Organization->Name*	Email	Phone	Notification
	Function	Employee number	Mobile phone	Location->Name*	
Gavalda	Anna	IT Department	gavalda@it.com	yes	00001
Rodin	Auguste	Demo	yes	00002	
Pissaro	Camille	Demo	yes	00003	
Monet	Claude	Demo	monet@demo.com	yes	00004
Degas	Edgar	Demo	yes	00005	
Manet	Edouard	Demo	yes	00006	
Delacroix	Eugène	Demo	delacroix@demo.com	yes	00007
Léger	Fernand	Demo	yes	00008	
Seurat	Georges-Pierre	Demo	yes	00009	
Klimt	Gustav	Demo	yes	00010	
Doré	Gustave	Demo	yes	00011	
Flaubert	Gustave	Demo	flaubert@it.com	yes	00012
Fantín-Latour	Henri	Demo	yes	00013	
Rousseau	Henri	Demo	yes	00014	
Doe	John	Demo	john.doe@demo.com	yes	00015
Da Vinci	Leonardo	Demo	no	00016	
Utrillo	Maurice	Demo	yes	00017	
Redon	Odilon	Demo	yes	00019	
Picasso	Pablo	Demo	no	00020	Paris
Cézanne	Paul	Demo	yes	00021	
Gauguin	Paul	Demo	yes	00022	
Van Rijn	Rembrandt	Demo	no	00023	
Dali	Salvador	Demo	dali@demo.com	yes	00024

Next >>

Then click “Next »” to proceed with the next step of the wizard.

Step 2 of 5: CSV data options

Separator character:

,(comma)

;(semicolon)

tab

other:

Text qualifier character

"(double quote)

'(single quote)

other:

Comments and header

Treat the first line as a header (column names)

Skip line(s) at the beginning of the file

Data Preview

001	Name*	First Name*	Organization->Name*	Email	Phone	Notification	Function	Employee number	Mobile phone	Location->Name*
002	Gavalda	Anna	IT Department	gavalda@it.com		yes		00001		
003	Rodin	Auguste	Demo			yes		00002		
004	Pissaro	Camille	Demo			yes		00003		
005	Monet	Claude	Demo	monet@demo.com		yes		00004		Paris
006	Degas	Edgar	Demo			yes		00005		
007	Manet	Edouard	Demo			yes		00006		
008	Delacroix	Eugène	Demo	delacroix@demo.com		yes		00007		Paris
009	Léger	Fernand	Demo			yes		00008		
010	Seurat	Georges-Pierre	Demo			yes		00009		

<< Back
Next >>

The following parameters must be adjusted during this step:

Parameter	Meaning
Separator Character	This is the character used for separating the different columns inside the CSV file. If the columns are properly displayed and separated in the preview at the bottom of the page, then the current choice is correct. (The typical choice for a CSV file is the comma)
Text Qualifier Character	Sometimes the values inside the cells contain the separator character. Such fields are then enclosed by the "text qualifier" character to prevent the separator character to be wrongly interpreted in the middle of a cell. (Typical value is either a simple or double quote)
Treat the first line as a header	Check this box if the first line of the file contains a header (column names) instead of actual data. Note that on the preview at the bottom of the page the header line is displayed with a different color.
Skip x lines at the beginning	Some CSV files (typically CSV files generated by hand made scripts) contain some comments at the beginning of the file. Use this setting to tell iTop to ignore as many lines as needed to skip the comments. The skipped lines are removed from the preview at the bottom of the page.

If the accented characters do not display properly in the preview, go back to the first page of the wizard using the "<< Back" button and pick the appropriate character set before uploading again your CSV file.

Once the data look correct in the preview, click on the “Next »” button to move to the next step:

Step 4 of 5: Import simulation

0 object(s) will stay unchanged.
 25 object(s) will be modified.
 5 object(s) will be added.
 0 object(s) will have errors.

Line	Status	Object	Name	First Name	Organization->Name	Email	Phone	Notification	Function	Employee number	Mobile phone	Location->Name	Message
002		Anna Gavalda	Gavalda	Anna	IT Department	gavalda@it.com		yes		00001			
003		Auguste Rodin	Rodin	Auguste	Demo			yes		00002			
004		Camille Pissaro	Pissaro	Camille	Demo			yes		00003			
005		Claude Monet	Monet	Claude	Demo	monet@demo.com		yes		00004		Paris	
006		Edgar Degas	Degas	Edgar	Demo			yes		00005			
007		Edouard Manet	Manet	Edouard	Demo			yes		00006			
008		Eugène Delacroix	Delacroix	Eugène	Demo	delacroix@demo.com		yes		00007		Paris	
009		Fernand Léger	Léger	Fernand	Demo			yes		00008			
010		Georges-Pierre Seurat	Seurat	Georges-Pierre	Demo			yes		00009			
011		Gustav Klimt	Klimt	Gustav	Demo			yes		00010			
012		Gustave Doré	Doré	Gustave	Demo			yes		00011			
013		Flaubert	Flaubert	Gustave	Demo	flaubert@it.com		yes		00012			Object will be created
030		Grant Wood	Grant	Wood	Demo			Undefined		00030			created
031		Albert Bierstadt	Albert	Bierstadt	No match					00031			Issue: failed to reconcile

The third step of the Import Wizard defines the mapping between the column of the CSV file and the fields of the object in iTop. The first operation consists in selecting the class of objects to import. This determines the list of fields available for the mapping.

Fields Mapping

If the CSV file has been originally made of a template or an iTop CSV export, then the header provided in the CSV should give you the good mapping automatically.

If this is not the case you have to make this mapping manually.

The wizard requires a mapping for each column of the imported data. However a column can be ignored (i.e. not imported) by selecting “– ignore this field –” as the mapping for this column.

Search Keys

The CSV Import Wizard can be used to either create or update objects in iTop. The wizard uses the search criterias (the search “keys”) defined at this step to determine whether each line of the CSV file corresponds

to an existing object in iTop or not. If the object exists, then it will be updated, otherwise it will be created. As usual in the search forms in iTop, all the selected search criterias are combined together using the AND operator. (i.e. an object must match all the value on the “keys” columns to be considered as a match).

The exact same imported CSV file can produce different results in iTop depending on the selected search keys. The number of objects created or updated depends on the search criterias configured at this stage.

Advanced Usage for Administrators

Administrators have access to an “Advanced mode” (checkbox at the top-right of the page), which allows to import objects based on their internal identifiers (ID or Key number). This is useful for renaming objects exported from iTop. Do not use this option for objects not exported from iTop, or at least make sure that you know the data you are importing!

Once the mapping and the search criterias look correct, proceed to the simulation of the import by clicking on the “Simulate Import” button.

After a few seconds, the following summary screen is displayed:

Step 4 of 5: Import simulation

0 objects(s) will stay unchanged.
 25 objects(s) will be modified.
 5 objects(s) will be added.
 0 objects(s) will have errors.

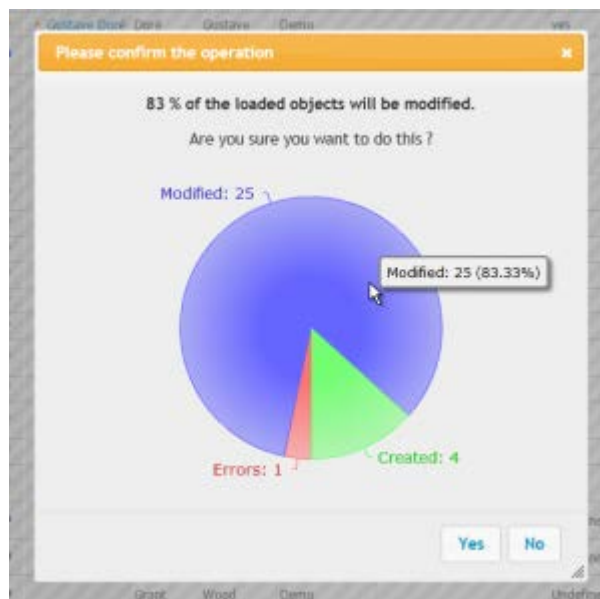
Line	Status	Object	Name	First Name	Organization->Name	Email	Phone	Notification	Function	Employee number	Mobile phone	Location->Name	Message
002		Anna Gavalda	Gavalda	Anna	IT Department	gavalda@it.com		yes		00001			
003		Auguste Rodin	Rodin	Auguste	Demo			yes		00002			
004		Camille Pissaro	Pissaro	Camille	Demo			yes		00003			
005		Claude Monet	Monet	Claude	Demo	monet@demo.com		yes		00004		Paris	
006		Edgar Degas	Degas	Edgar	Demo			yes		00005			
007		Edouard Manet	Manet	Edouard	Demo			yes		00006			
008		Eugène Delacroix	Delacroix	Eugène	Demo	delacroix@demo.com		yes		00007		Paris	
009		Fernand Léger	Léger	Fernand	Demo			yes		00008			
010		Georges-Pierre Seurat	Seurat	Georges-Pierre	Demo			yes		00009			
011		Gustav Klimt	Klimt	Gustav	Demo			yes		00010			
012		Gustave Doré	Doré	Gustave	Demo			yes		00011			
013		Flaubert	Flaubert	Gustave	Demo	flaubert@it.com		yes		00012			Object will be created
030		Albert Bierstadt	Grant	Wood	Demo			Undefined		00030			created
031		Albert Bierstadt	Albert	Bierstadt	No match					00031			Issue: failed to reconcile

Note the number of objects to be created and the number of objects to be updated, as well as the number of errors. You can use the checkboxes at the top of the page to filter the display for a quicker analysis of the results.

The lines in errors are highlighted with a red background. Errors will not prevent the import from running, but the corresponding lines will be rejected.

If the simulation looks correct, click “Run the Import!” to perform the actual import. If you need to modify the data, click on “|<< Restart” (the Copy and paste data” tab will contain a copy of the uploaded data).

If the number of objects imported and the percentage of objects to be created or updated exceeds a certain level, a confirmation dialog is displayed:



Click “Yes” to close the dialog and proceed with the data import.

The last screen of the wizard displays the summary of the operations performed during the import.

Step 5 of 5: Import completed

0 object(s) remained unchanged.
 25 object(s) were modified.
 4 object(s) were added.
 1 object(s) had errors.

Line	Status	Object	Name	First Name	Organization->Name	Email	Phone	Notification	Function	Employee number	Mobile phone	Location->Name	Message
002		Anna Gavalda	Gavalda	Anna	IT Department	gavalda@it.com		yes		00001			
003		Auguste Rodin	Rodin	Auguste	Demo			yes		00002			
004		Camille Pissaro	Pissaro	Camille	Demo			yes		00003			
005		Claude Monet	Monet	Claude	Demo	monet@demo.com		yes		00004		Paris	
006		Edgar Degas	Degas	Edgar	Demo			yes		00005			
007		Edouard Manet	Manet	Edouard	Demo			yes		00006			
008		Eugène Delacroix	Delacroix	Eugène	Demo	delacroix@demo.com		yes		00007		Paris	
009		Fernand Léger	Léger	Fernand	Demo			yes		00008			
010		Georges-Pierre Seurat	Seurat	Georges-Pierre	Demo			yes		00009			
011		Gustav Klimt	Klimt	Gustav	Demo			yes		00010			
012		Gustave Doré	Doré	Gustave	Demo			yes		00011			
024		Salvador Dali	Dali	Salvador	Demo	dali@demo.com		yes		00024		Grenoble	
025		Vassily Kandinski	Kandinski	Vassily	Demo			no		00025			
026		Victor Hugo	Hugo	Victor	IT Department	hugo@it.com		yes		00026			
027		Vincent Van Gogh	Van Gogh	Vincent	Demo			yes		00027			
028		Andrew Wyeth	Wyeth	Andrew	Demo			Undefined		00028			Object created
029		Andy Warhol	Warhol	Andy	Demo			Undefined		00029			Object created
030		Wood Grant	Grant	Wood	Demo			Undefined		00030			Object created
031			Albert	Bierstadt	zzDemozz					00031			Issue: failed to reconcile

Lines that could not be loaded

The following lines have not been imported because they contain errors

```

'Name' 'First Name' 'Organization->Name' 'Email' 'Phone' 'Notification' 'Function'
'Employee number' 'Mobile phone' 'Location->Name'
'Albert' 'Bierstadt' 'zzDemozz' '' '' '' '' '00031' '' ''
    
```

In case of errors, the rejected lines are listed at the bottom of the report, they can be copied/pasted and corrected before trying to import them again.

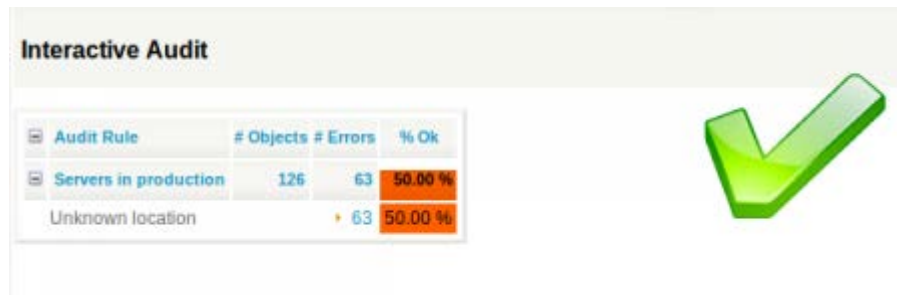
An alternative to this is to proceed iteratively:

1. Complete the import, and note which lines have errors. Remember that lines having errors are simply ignored.
2. Fix the lines in error from your reference CSV file.
3. Run again the import with the your reference CSV file, until no error is found.

iTop will ignore lines that have been unchanged, because the corresponding data is already up to date (unless modified by somebody else in the mean time between two imports). Iterating on the whole CSV file may be the preferred option if you need to maintain a reference CSV file of your data.

Understanding Audits

The “Audit” is an iTop feature designed to check the consistency of information stored in the iTop database. Using the audit, you can answer questions like: “Do we have an active support contract defined for any device in production?” or “Do we know the localization of all the servers for on-site support?”



Audit Rule	# Objects	# Errors	% Ok
Servers in production	126	63	50.00 %
Unknown location		63	50.00 %

The verifications are named **audit rules**.

Audit rules are grouped into **audit categories**. A category defines the list of objects (the scope) that must be compliant with the rules. This scope is computed dynamically. In other words the list of objects to check is evaluated when the audit page is being displayed.

An **audit rule** defines the actual constraint that needs to be checked for each object in the scope. For instance “Device must be attached to at least one active support contract.”.

To add or modify an **audit category** or an **audit rule**, ask your iTop administrators. Only administrators are allowed to manage audit categories and rules.

Understanding the Audit Report

The audit is run interactively by clicking the “Audit” link in the “Data administration” menu.

Total number of objects audited in this category

Number of objects with at least one error

Percentage of objects without any error

Audit Rule	# Objects	# Errors	% Ok
Servers in production	126	63	50.00 %
Unknown location		63	50.00 %

Number of objects in error for the given rule. Click to see the list.

The audit report list all the categories to be audited. For each category the header line contains:

- The number of objects in this category
- The number of objects with **at least one error** (as reported by the rules in this category)
- The percentage of objects without any error in this category
- Then for each rule, an additional line indicates:
 - the number of objects in error *for this rule*. Clicking on the number displays the list of objects in error
 - the percentage of objects without error *for this rule*

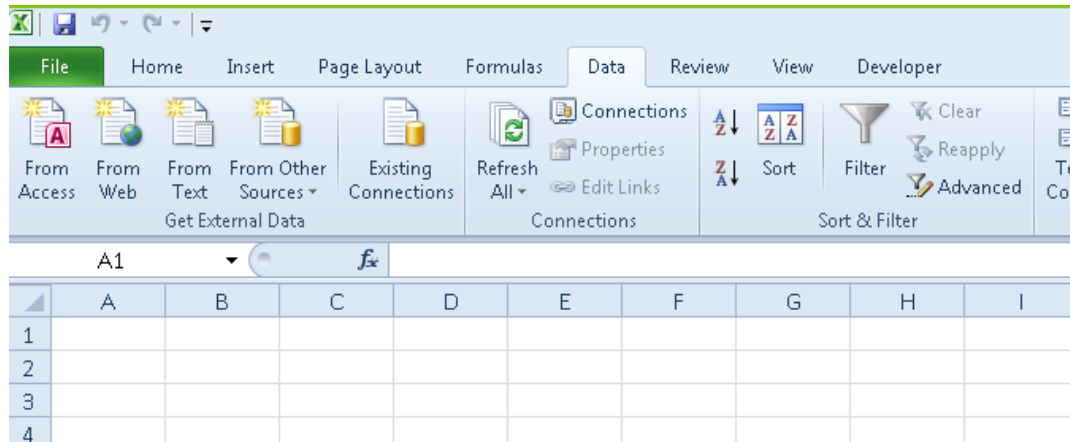
How to create an Excel report using iTop query

Administrators can store in iTop predefined queries. These queries can then be used to create reports in Excel. A query is identified by a number. It is called in Excel using a URL provided by iTop administrator. For example, the URL below stored in the query phrasbook return a list of User Request:

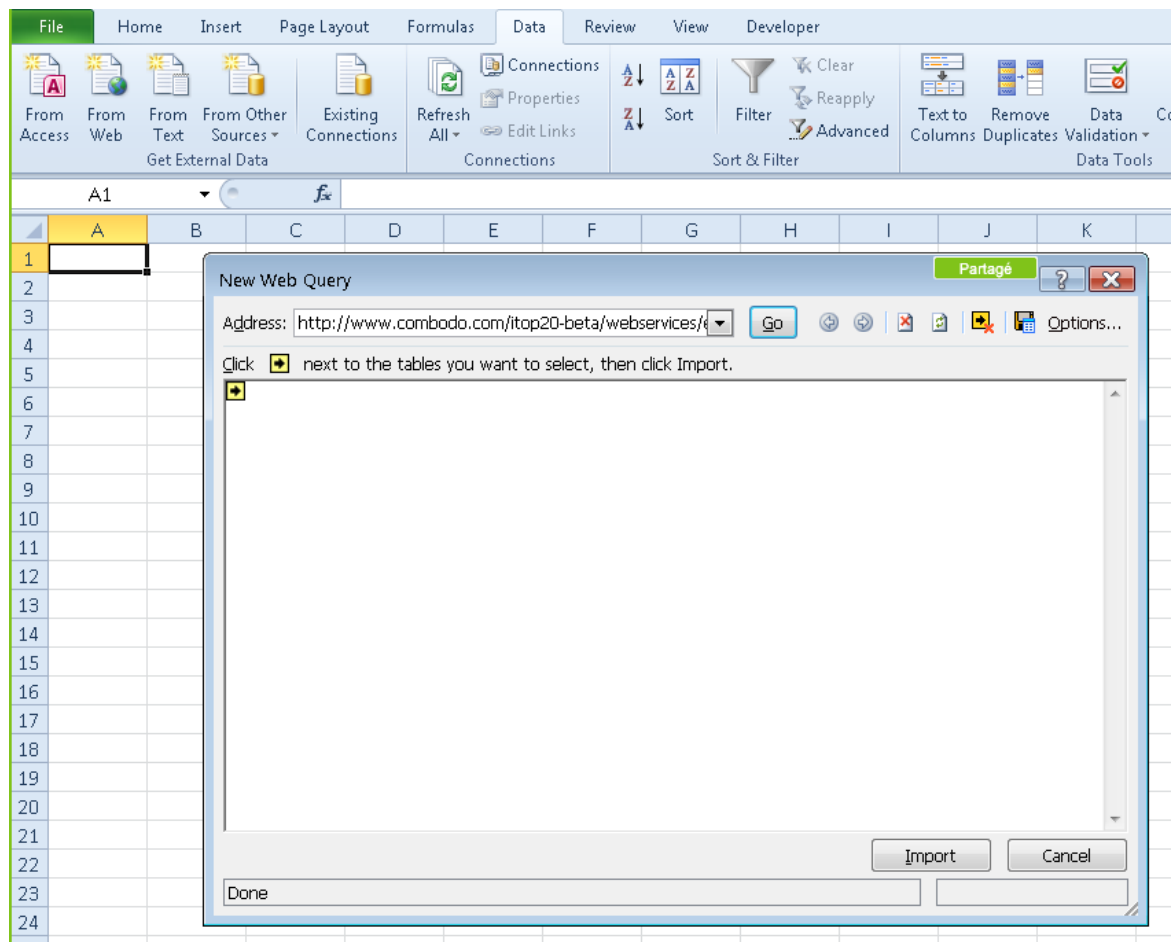
URL to use for MS-Excel web queries:

```
http://www.combodo.com/itop20-beta/webservices/export.php?format=sheet&login_mode=basic&query=1
```

To use this query in Excel click on the button “From Web” in the Excel tab “Data”



A window appears for entering the URL to call:

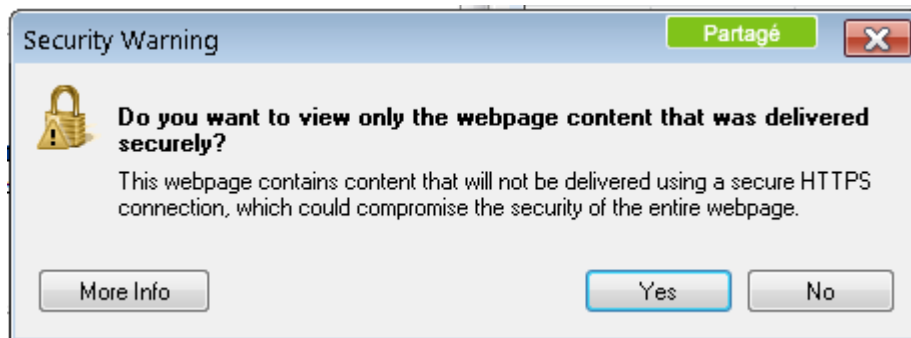


Enter the URL provided by the iTop administrator in the “Address” part and click on “Go”

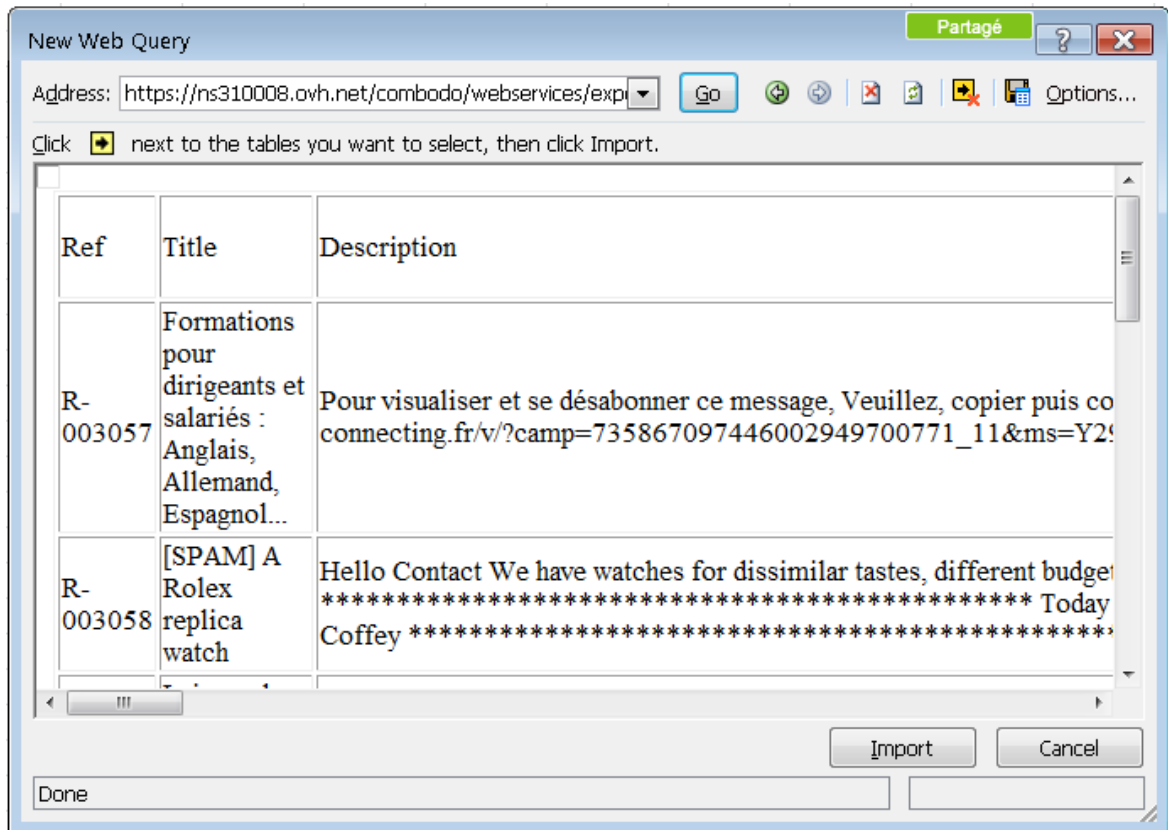
The iTop authentication window is displayed. Enter your user account and your password:



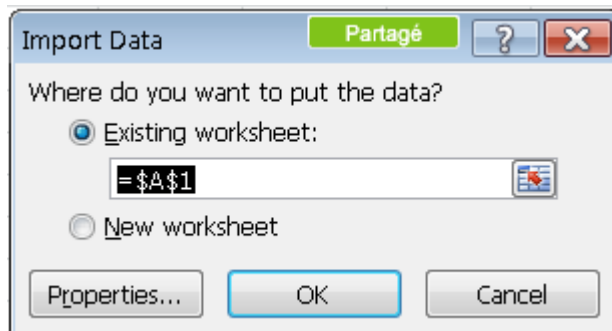
Click on "Ok" if you are prompt by security popup windows.



The "New Web Query" is updated with the list of columns to be imported:

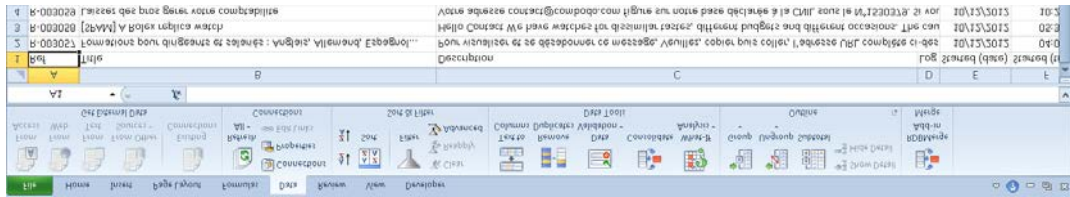


Click the “Import” button. Excel asks you where you want to insert the data:



If your query contains parameters, Excel will open several successive windows to enter them. Be careful, date parameters support only the format yyyy-mm-dd.

Click the “OK” button and Excel displays the result of the query. The language used for the display of columns corresponds to the default language of your login in iTop.



To refresh the data, click on the button “Refresh All” in the “Data” tab of Excel:

You can use as many iTop queries as you want and use the results to create graphs or charts dynamically using standard Excel features.

Data Model Documentation

Configuration Management

The configuration management module defines the objects to be managed inside iTop. It defines all the physical devices (PCs, Servers, Printers, Network devices, Telephones, etc.) but also some logicals elements (Groups, Application Solutions, Business Processes), software objects (Software Instances, Licenses, etc.) and structuring entities (Organizations and Locations). Persons and Teams are also defined in this module.

In order to keep the elements to manage as simple as possible while covering most IT needs, the configuration management domain has been split into 5 modules:

Module Name	Description
Configuration Management Core	This module is mandatory and covers all the basic building blocks of the CMDB: Organizations, Persons, Teams, Servers, Software Entities, Groups...
End-Users Devices	This optional module provides support for end-user related devices: PCs, Telephones, Printers and other Peripherals.
Virtualization Management	Virtual Machines, Hypervisors, Farms are defined in this module. You don't need to install this module if you don't want to managed virtualized infrastructures.
Advanced Storage Management	This optional module defines objects to managed advanced storage infrastructures, including SAN, NAS, Storage Systems, Fiber Channel Interfaces, Volumes...
Data Center Management	This optional module provides objects to manage a datacenter: racks, enclosures, power connections...

Service Management

At the heart of the ITIL methodology, service management is a key part of iTop. The relations between the organizations are defined by the customer and provider contracts defined in this module. The delivery model used by the ticketing is also defined in this module. In iTop 2.0, service management comes in to alternative flavors:

Service Management for Enterprises This module is best suited to describe an single company environment where the same shared infrastructure is used to deliver IT services to all the organizations.

Service Management for Providers This module aimed at describing a service provider environment in which a dedicated infrastructure is operated for each customer.

The documentation for these two modules is grouped in: [Service Management \(services, SLAs, contracts\) Module](#).

Ticketing

When installing iTop, two different types of ticketing are available:

[Simple Ticketing](#) This module provides a simple ticketing scheme for processing all user requests and incidents using a unified ticketing with a simple workflow.

[ITIL Compliant Tickets](#) This module follows the ITIL guidelines by distinguishing User Requests tickets from Incident tickets

Change Management

Two different types of Change Management tickets are available in iTop:

[Simple Change Management](#) Use this module to track all your changes using one type of “Change” ticket with a simple process.

[ITIL Compliant Change Management](#) Use this module to track all your changes using ITIL compliant processes, with Normal / Routine or Emergency changes, each with a different life-cycle.

Problem Management

This optional module provides support for the [problem management process](#), thanks to dedicated Problem tickets.

Known Errors Management

Document [Known Errors and FAQs](#) with this optional module.

Configuration Management (CMDB) Module

The Configuration Management module is mandatory module of iTop. It contains the definition of all the basic building blocks of the CMDB: Organizations, Contacts (Persons and Teams) as well as the usual physical devices (Servers, Network Devices...), software elements (DB Server, Database Schemas, Licences, Patches...) and the relations between all these objects.

Contacts

Person



The class Person is used to describe physical persons as contacts in the CMDB. Persons can be grouped into Teams. Persons can be linked to other configuration items (for example to describe who to contact in case of problem with an application). In iTop the caller of a User request is a Person as well as the agent assigned to resolve it.

Person Properties

Name	Type	Mandatory?
Last Name	Alphanumeric string	Yes
First Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: Active, Inactive	Yes
Location	Foreign key to a(n) Location	No
Function	Alphanumeric string	No
Manager	Foreign key to a(n) Person	No
Employee number	Alphanumeric string	No

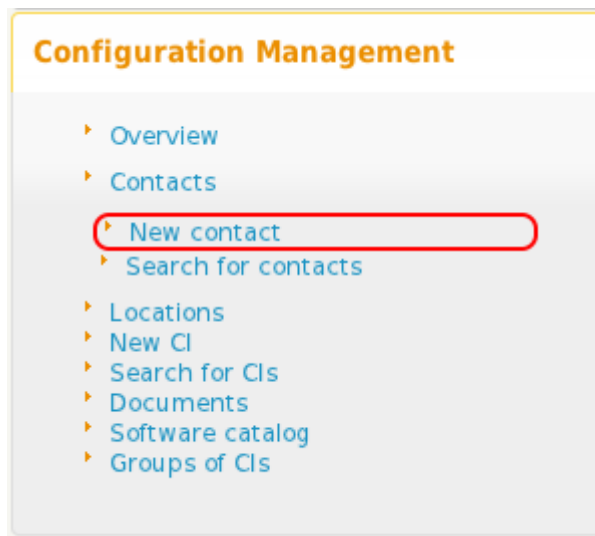
Email	Email address	No
Notification	Possible values: no, yes	No
Phone	Alphanumeric string	No
Mobile phone	Alphanumeric string	No

Tabs

Tab	Description
Teams	All the teams this person belongs to
Tickets	All the tickets this person is the caller
CIs	All the configuration items linked to this contact

Creating a new Person

Click on the “New contact” menu:



Then select “Person” in the form below:

Select the type of Contact to create:

And click “Apply” to display the Person creation form:

The screenshot shows a web form for creating a user in iTop. At the top, there are 'Cancel' and 'Create' buttons. Below them is a navigation bar with tabs for 'Properties', 'Teams', 'Tickets', and 'CIs'. The main form area is divided into two sections: 'General informations' and 'Notification'. The 'General informations' section contains the following fields: Last Name (text input with a red exclamation mark icon), First Name (text input with a red exclamation mark icon), Organization (dropdown menu with '-- select one --' and '+', '-', and '!' icons), Status (dropdown menu with 'Active'), Location (dropdown menu with '-- select one --' and a '+' icon), Function (text input), Manager (dropdown menu with '-- select one --' and a '+' icon), and Employee number (text input). The 'Notification' section contains: Email (text input), Notification (radio buttons for 'no' and 'yes'), Phone (text input), and Mobile phone (text input). At the bottom of the form, there are 'Cancel' and 'Create' buttons.

Team



A team represents a group of persons. In iTop, Teams can be used to: associate a set of persons to a given configuration item, create a “workgroup” for assigning tickets or group persons for receiving notifications.

A Team cannot be a member of another Team.

Team Properties

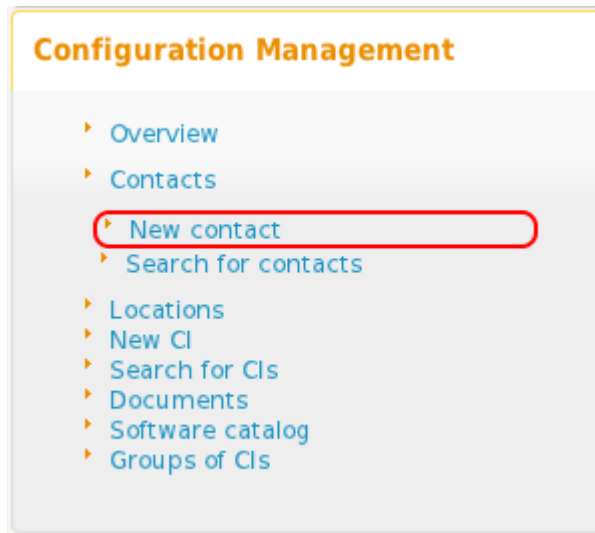
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Status	Possible values: Active, Inactive	Yes
Organization	Foreign key to a(n) Organization	Yes
Email	Email address	No
Phone	Alphanumeric string	No
Notification	Possible values: no, yes	No
Function	Alphanumeric string	No

Tabs

Tab	Description
Members	All the people belonging to this team
Tickets	All the tickets assigned to this team
CIs	All the configuration items linked to this contact

Creating a new Team

Click on the “New contact” menu:



Then select “Team” in the form below:

Select the type of Contact to create:

And click “Apply” to display the Team creation form:

Cancel Create

Properties Members Tickets Cls

Name !

Status Active

Organization -- select one -- + !

Email

Phone

Notification no yes

Function

Cancel Create

To add members to the Team, click on the tab “Members” and use the buttons to Add/Remove Persons from the list.

You can also specify a “Role” for each member of the Team.

Documents

There are several types of documents in iTop. All of them can be managed from the “Documents” menu in the “Configuration Management” section:



Document File



A File Document is used to upload documentation that can be shared across multiple objects in the CMDB. Once a document (in any format: Word,

PDF, Spreadsheet, etc.) has been uploaded into iTop, it can be “attached” to many different configuration items that share the same documentation. This is useful for processing instructions, technical documentation, etc. that need to be referenced from several places in the CMDB.

File Documents are stored inside the MySQL database so their maximum size is limited by:

- The maximum upload size configured on the web server
- The maximum size of a MySQL packet configured on the MySQL server

Document File Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: Draft, Obsolete, Published	No
Document type	Foreign key to a(n) Document Type	No
Description	Multiline character string	No
File	Any binary content (document)	Yes

Tabs

Tab	Description
CIs	All the configuration items linked to this document
Contracts	All the contracts linked to this document
Services	All the services linked to this document

Document Note



A Note is used to store a short text document. HTML formatting of Notes is supported using the WYSIWYG editor.

Document Note Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes

Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: Draft, Obsolete, Published	No
Document type	Foreign key to a(n) Document Type	No
Description	Multiline character string	No
Text	HTML string	Yes

Tabs

Tab	Description
CIs	All the configuration items linked to this document
Contracts	All the contracts linked to this document
Services	All the services linked to this document

Document Web



Web documents are used to store hyperlinks to external applications or documents. Think to them as “pointers” to external documents.

Document Web Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: Draft, Obsolete, Published	No
Description	Multiline character string	No
URL	Absolute or relative URL as a text string	No

Tabs

Tab	Description
CIs	All the configuration items linked to this document
Contracts	All the contracts linked to this document
Services	All the services linked to this document

Configuration Items

Application Solution



Application Solutions describe complex applications that are made of (or depend on) several basic components. They are a specialized type of “Group” for documenting large applications. The main information conveyed by an Application Solution is its list of relationships.

Application Solution Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: active, inactive	No
Business criticality	Possible values: high, low, medium	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
CIs	All the configuration items that compose this application solution
Business processes	All the business processes depending on this application solution
Provider contracts	All the provider contracts for this configuration item

Creating a new Application Solution

Click on the “New CI” menu:



Then select “Application Solution” in the form below:

Select the type of Functional CI to create:

And click “Apply” to display the Application Solution creation form:

The screenshot shows the 'Application Solution' creation form. At the top, there are 'Cancel' and 'Create' buttons. Below them is a tabbed interface with tabs for Properties, Contacts, Documents, Tickets, CIs, Business processes, Provider contracts, and Services. The 'Properties' tab is active. The form contains the following fields: Name (text input with a red warning icon), Organization (dropdown menu with '-- select one --' and '+', '-' buttons and a red warning icon), Status (dropdown menu with 'active'), Business criticality (dropdown menu with 'low'), Move to production date (calendar icon), and Description (text area). At the bottom, there are 'Cancel' and 'Create' buttons.

To link other configuration items to the new Application Solution, click on the tab “CIs” and use the buttons to Add/Remove CIs from the list. The tab “Contacts” is for managing the relationships with Contacts, etc.

Relations

- Impacts: an Application Solution is considered as impacting all its related Business Processes (listed in the tab “Business Processes”).
- Depends on: an Application Solution is considered as depending on all its related CIs (listed in the tab “CIs”).

Business Process



A Business Process is used to document a high-level process or an important application for the operations. It is quite similar to an Application Solution but for describing higher level applications or whole processes in the organization. The main information conveyed by a Business Process is its list of relationships with Application Solutions and Contacts.

Business Process Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: active, inactive	No
Business criticality	Possible values: high, low, medium	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Application solutions	All the application solutions that impact this business process

Creating a new Business Process

The creation of a Business Process object is similar to the creation of an Application Solution, except that its components are Application Solutions instead of any CIs.

Relations

- Impacts: no additional CIs are impacted by a Business Process.
- Depends on: a Business Process is considered as depending on all its related Application Solutions (listed in the tab “Application Solutions”).

DB Server



An instance of a database server software (like MySQL, Oracle, SQL Server, DB2…) running on a particular system (PC, Server or Virtual Machine).

DB Server Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: active, inactive	No
Business criticality	Possible values: high, low, medium	No
System	Foreign key to a(n) Functional CI	Yes
Software	Foreign key to a(n) Software	No
Software licence	Foreign key to a(n) Software Licence	No
Path	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
-----	-------------

Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Application solutions	All the application solutions depending on this configuration item
DB schemas	All the database schemas for this DB server
Provider contracts	All the provider contracts for this configuration item

Creating a new DB Server

Click on the “New CI” menu:



Then select “DB Server” in the form below:

Select the type of Functional CI to create:

And click “Apply” to display the DB Server creation form:

Cancel Create

Properties Contacts Documents Tickets Application solutions DB schemas Provider contracts

Services

Name !

Organization -- select one -- + + !

Status -- select one --

Business criticality low

System -- select one -- !

Software -- select one -- +

Software licence -- select one -- +

Path

Move to production date 📅

Description

Cancel Create

Relations

- Impacts: a DB Server impacts all its Database Schemas, as well as the Application Solutions it belong to. A DB Server also impacts the contacts (Persons or Teams) linked to it.
- Depends on: a DB Server is considered as depending on the system (PC, Server or Virtual Machine) on which it runs.

Database Schema



An instance of dabatase running of a specific DB server.

Database Schema Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes

DB server	Foreign key to a(n) DB Server	Yes
Business criticality	Possible values: high, low, medium	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Application solutions	All the application solutions depending on this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new Database Schema

Click on the “New CI” menu:



Then select “Database Schema” in the form below:

Select the type of Functional CI to create:

And click “Apply” to display the Database Schema creation form:

The screenshot shows a web-based configuration form for 'Application solutions'. At the top, there are navigation tabs: 'Properties' (selected), 'Contacts', 'Documents', 'Tickets', 'Application solutions', 'Provider contracts', and 'Services'. Below the tabs, the form contains several fields:

- Name:** A text input field with a red exclamation mark icon to its right, indicating a validation error.
- Organization:** A dropdown menu showing '-- select one --' with two '+' icons and a red exclamation mark icon to its right.
- DB server:** A dropdown menu showing '-- select one --' with a '+' icon and a red exclamation mark icon to its right.
- Business criticality:** A dropdown menu with 'low' selected.
- Move to production date:** A date input field with a calendar icon to its right.
- Description:** A large, empty text area.

 At the bottom of the form, there are 'Cancel' and 'Create' buttons.

Relations

- Impacts: a Database Schema impacts all the Application Solutions it belongs to.
- Depends on: a Database Schema is considered as depending on its DB Server.

Middleware



An instance of a middleware software (software offering services to other software, or enterprise integration software) installed on a particular system (PC, Server or Virtual Machine). For example: Tomcat, JBoss, Talend, Microsoft BizTalk, IBM Websphere or Lotus Domino can be put under this category.

Middleware Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: active, inactive	No
Business criticality	Possible values: high, low, medium	No
System	Foreign key to a(n) Functional CI	Yes

Software	Foreign key to a(n) Software	No
Software licence	Foreign key to a(n) Software Licence	No
Path	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Application solutions	All the application solutions depending on this configuration item
Middleware instances	All the middleware instances provided by this middleware
Provider contracts	All the provider contracts for this configuration item

Creating a new Middleware

Click on the “New CI” menu:



Then select “Middleware” in the form below:

Select the type of Functional CI to create:

And click “Apply” to display the Middleware creation form:

The screenshot shows a web-based configuration form for 'Middleware instances'. At the top, there are navigation tabs: 'Properties', 'Contacts', 'Documents', 'Tickets', 'Application solutions', and 'Middleware instances'. Below these are sub-tabs: 'Provider contracts' and 'Services'. The form itself contains several input fields and dropdown menus:

- Name:** A text input field with a red warning icon.
- Organization:** A dropdown menu with '-- select one --' and a red warning icon.
- Status:** A dropdown menu with '-- select one --'.
- Business criticality:** A dropdown menu with 'low' selected.
- System:** A dropdown menu with '-- select one --' and a red warning icon.
- Software:** A dropdown menu with '-- select one --' and a '+' icon.
- Software licence:** A dropdown menu with '-- select one --' and a '+' icon.
- Path:** A text input field.
- Move to production date:** A date input field with a calendar icon.
- Description:** A large text area for entering details.

At the bottom of the form, there are 'Cancel' and 'Create' buttons.

Relations

- **Impacts:** a Middleware impacts all its Middleware Instances, as well as the Application Solutions it belong to. A Middleware also impacts the contacts (Persons or Teams) linked to it.
- **Depends on:** a Middleware is considered as depending on the system (PC, Server or Virtual Machine) on which it runs.

Middleware Instance



A particular application instance (or service) provided by an installed middleware software. For example a web application deployed with Tomcat can be documented as a Middleware Instance.

Middleware Instance Properties

Name	Type	Mandatory?
------	------	------------

Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Middleware	Foreign key to a(n) Middleware	Yes
Business criticality	Possible values: high, low, medium	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Application solutions	All the application solutions depending on this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new Middleware Instance

Click on the “New CI” menu:



Then select “Middleware Instance” in the form below:

Select the type of Functional CI to create:

And click “Apply” to display the Middleware Instance creation form:

Relations

- Impacts: a Middleware Instance impacts all the Application Solutions it belong to. A Middleware Instance also impacts the contacts (Persons or Teams) linked to it.
- Depends on: a Middleware Instance is considered as depending on its Middleware.

Network Device



Any type of network device: router, switch, hub, load balancer, firewall...

Network Device Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Rack	Foreign key to a(n) Rack	No
Enclosure	Foreign key to a(n) Enclosure	No
Network type	Foreign key to a(n) Network Device Type	Yes

Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
IOS version	Foreign key to a(n) IOS Version	No
RAM	Alphanumeric string	No
NB U	Numeric value (could be negative)	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
PowerA source	Foreign key to a(n) Power Connection	No
PowerB source	Foreign key to a(n) Power Connection	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Network interfaces	All the physical network interfaces
Devices	All the devices connected to this network device
Provider contracts	All the provider contracts for this configuration item

Creating a new Network Device

Click on the “New CI” menu:



Then select “Network Device” in the form below:

Select the type of Functional CI to create:

And click “Apply” to display the Network Device creation form:

Cancel
Create

Properties
Contacts
Documents
Tickets
Network interfaces
Devices
Provider contracts
Services

General informations

Name

Organization

Status

Business criticality

Location

Rack

Enclosure

More informations

Network type

Brand

Model

IOS version

RAM

NB U

Serial number

Asset number

Date

Move to production date

Purchase date

End of warranty

Other informations

PowerA source

PowerB source

Description

Cancel
Create

Relations

- Impacts: a Network Device impacts all the devices connected to it (Servers, PCs, SAN Switches, NAS, Storage Systems, other Network Devices, etc.), the Application Solutions it belongs to and all the contacts (Persons or Teams) directly linked to it.
- Depends on: a Network Device is considered as depending on the other Network Devices and SAN Switches it is connected to. If the Network Devices is located in an Enclosure, it depends on it.

Other Software



Any type of software that do not fit in the other categories: PC Software, Middleware, DB server or Web Server.

Other Software Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: active, inactive	No
Business criticality	Possible values: high, low, medium	No
System	Foreign key to a(n) Functional CI	Yes
Software	Foreign key to a(n) Software	No
Software licence	Foreign key to a(n) Software Licence	No
Path	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

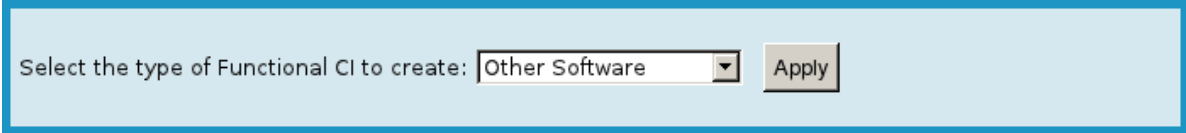
Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Application solutions	All the application solutions depending on this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new Other Software

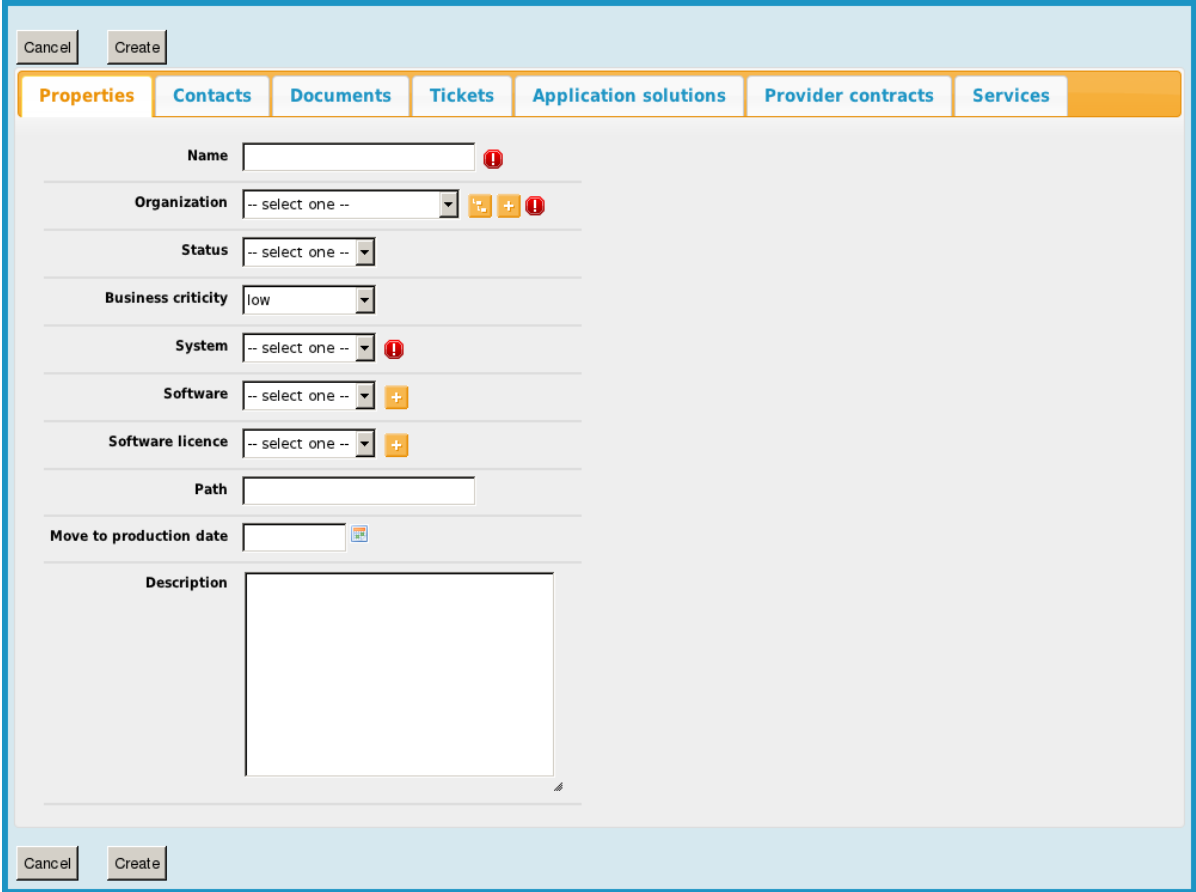
Click on the “New CI” menu:



Then select “Other Software” in the form below:



And click “Apply” to display the Other Software creation form:



Relations

- Impacts: an Other Software impacts all its instances, the Application Solutions it belongs to and all the contacts (Persons or Teams) directly linked to it.
- Depends on: an Other Software is considered as depending on the system (PC, Server or Virtual Machine) on which it runs.

PC Software



An instance of a software application installed on a PC. (For example: an instance of MS Office, Corel Draw, Adobe Photoshop or Filezilla).

PC Software Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: active, inactive	No
Business criticality	Possible values: high, low, medium	No
System	Foreign key to a(n) Functional CI	Yes
Software	Foreign key to a(n) Software	No
Software licence	Foreign key to a(n) Software Licence	No
Path	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

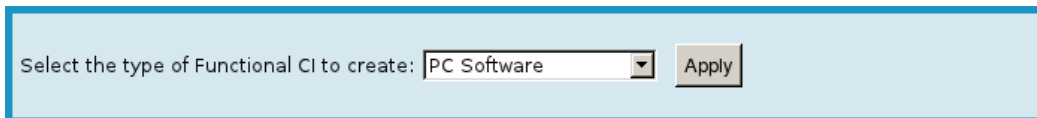
Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Application solutions	All the application solutions depending on this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new PC Software

Click on the “New CI” menu:

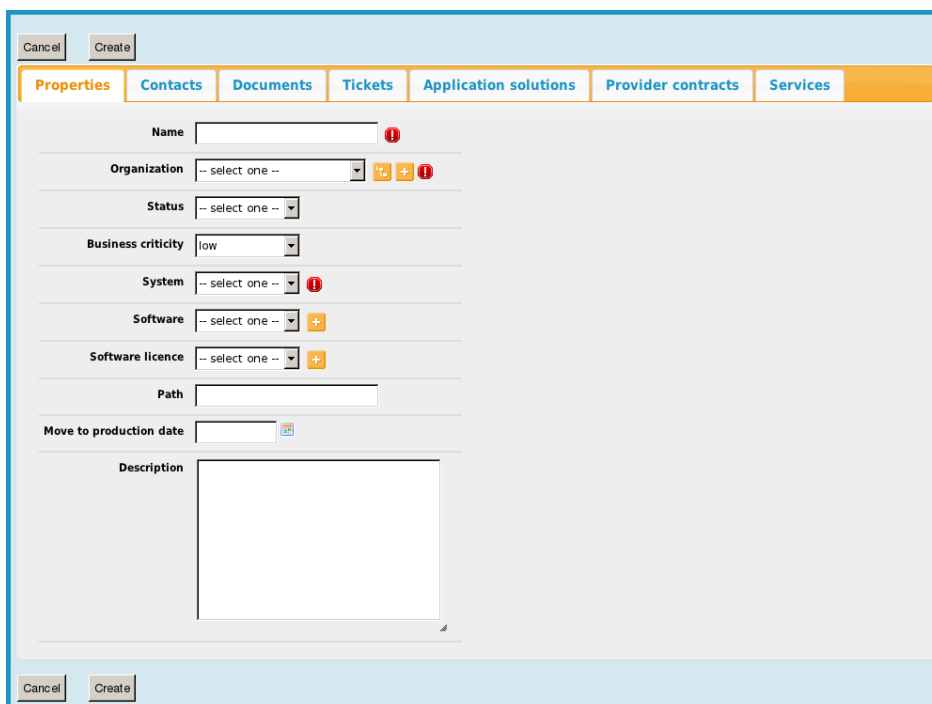


Then select “PC Software” in the form below:



Select the type of Functional CI to create:

And click “Apply” to display the PC Software creation form:



The image shows the PC Software creation form. It has a 'Cancel' and 'Create' button at the top left. The form is divided into several tabs: Properties, Contacts, Documents, Tickets, Application solutions, Provider contracts, and Services. The 'Properties' tab is active. The form contains the following fields: Name (text input), Organization (dropdown menu), Status (dropdown menu), Business criticality (dropdown menu, set to 'low'), System (dropdown menu), Software (dropdown menu), Software licence (dropdown menu), Path (text input), Move to production date (text input), and Description (text area). There are also several warning icons (red exclamation marks) next to the Name, Organization, System, and Software licence fields.

Relations

- Impacts: a PC Software impacts all its instances, the Application Solutions it belongs to and all the contacts (Persons or Teams) directly linked to it.
- Depends on: a PC Software is considered as depending on the PC on which it runs.

Server



A Server is typically used in iTop to document a physical server machine. The Server object documents asset management information, physical characteristics and operational informations (contracts and services). A Server can be related to software components, contacts and documents. More relationships can be added to Servers by other modules like the module “Advanced Storage” .

Server Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Rack	Foreign key to a(n) Rack	No
Enclosure	Foreign key to a(n) Enclosure	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
OS family	Foreign key to a(n) OS Family	No
OS version	Foreign key to a(n) OS Version	No
OS licence	Foreign key to a(n) OS Licence	No
CPU	Alphanumeric string	No
RAM	Alphanumeric string	No
NB U	Numeric value (could be negative)	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No

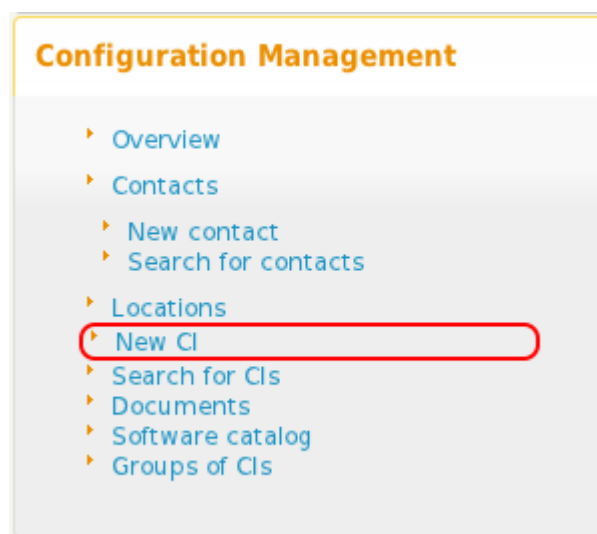
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
PowerA source	Foreign key to a(n) Power Connection	No
PowerB source	Foreign key to a(n) Power Connection	No
Description	Multiline character string	No

Tabs

Tab	Description
Softwares	All the softwares installed on this configuration item
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Network interfaces	All the physical network interfaces
FC ports	All the fiber channel interfaces for this device
Network devices	All network devices connected to this device
SANs	All the SAN switches connected to this device
Logical volumes	All the logical volumes connected to this server
Provider contracts	All the provider contracts for this configuration item

Creating a new Server

Click on the “New contact” menu:

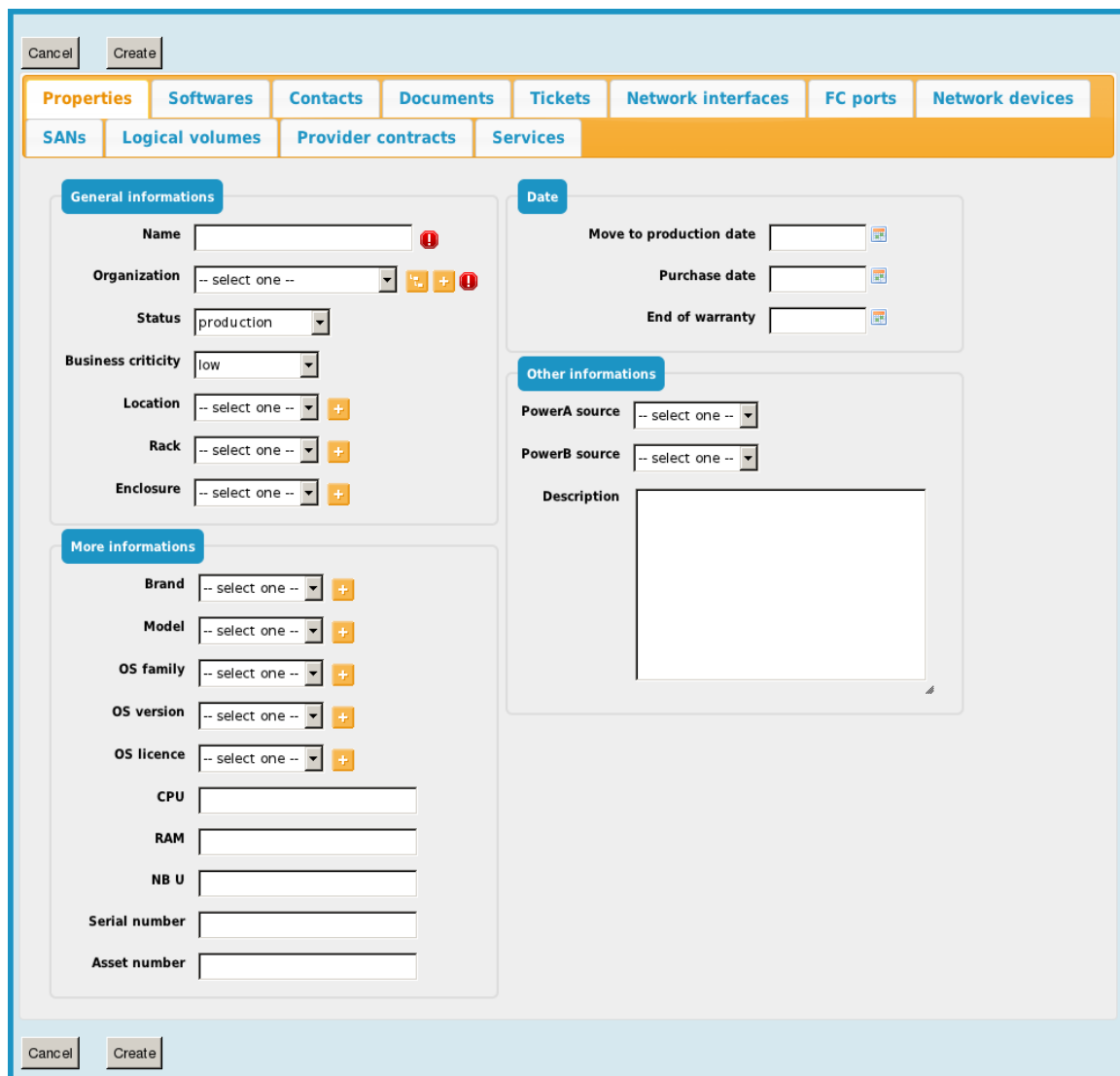


Then select “Server” in the form below:



Select the type of Functional CI to create:

And click “Apply” to display the Server creation form:



Cancel

Properties Softwares Contacts Documents Tickets Network interfaces FC ports Network devices
SANs Logical volumes Provider contracts Services

General informations

Name !

Organization + + !

Status

Business criticality

Location +

Rack +

Enclosure +

Date

Move to production date

Purchase date

End of warranty

Other informations

PowerA source

PowerB source

Description

More informations

Brand +

Model +

OS family +

OS version +

OS licence +

CPU

RAM

NB U

Serial number

Asset number

Cancel

Relations

- Impacts: a Server impacts all the software instances running on it, as well as hypervisors. A Server is also considered as impacting any Application Solution it belongs to.
- Depends on: a Server is considered as depending on the Logical Volumes, SAN Switches and the Network Devices it is connected to. If the Server is located in an Enclosure, it is considered as depending on it.

Web Application



An instance of an application accessible using a web browser and that runs on a given Web Server instance.

Web Application Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Web server	Foreign key to a(n) Web server	Yes
URL	Absolute or relative URL as a text string	No
Business criticality	Possible values: high, low, medium	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Application solutions	All the application solutions depending on this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new Web Application

Click on the “New CI” menu:



Then select “Web Application” in the form below:

A form with a light blue background. It contains the text 'Select the type of Functional CI to create:' followed by a dropdown menu showing 'Web Application' and an 'Apply' button.

And click “Apply” to display the Web Application creation form:

A screenshot of a web application creation form. At the top, there are 'Cancel' and 'Create' buttons. Below them is a navigation bar with tabs: Properties (selected), Contacts, Documents, Tickets, Application solutions, Provider contracts, and Services. The form fields include: Name (text input), Organization (dropdown menu), Web server (dropdown menu), URL (text input), Business criticality (dropdown menu set to 'low'), Move to production date (text input), and Description (text area). At the bottom, there are 'Cancel' and 'Create' buttons.

Relations

- Impacts: a Web Application impacts the Application Solutions it belongs to and all the contacts (Persons or Teams) directly linked to the Web Application.

- Depends on: a Web Application is considered as depending on the Web Server on which it runs.

Web server



An instance of a web server software running on a specific system (PC, Server or Virtual Machine).

Web server Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: active, inactive	No
Business criticality	Possible values: high, low, medium	No
System	Foreign key to a(n) Functional CI	Yes
Software	Foreign key to a(n) Software	No
Software licence	Foreign key to a(n) Software Licence	No
Path	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Application solutions	All the application solutions depending on this configuration item
Web applications	All the web applications available on this web server
Provider contracts	All the provider contracts for this configuration item

Creating a new Web server

Click on the “New CI” menu:



Then select “Web server” in the form below:

Select the type of Functional CI to create:

And click “Apply” to display the Web server creation form:

The image shows a 'Web server creation form' with the following fields and controls:

- Buttons: Cancel, Create
- Navigation tabs: Properties, Contacts, Documents, Tickets, Application solutions, Web applications, Provider contracts
- Section: Services
- Fields: Name (with error icon), Organization (dropdown with error icon), Status (dropdown), Business criticality (dropdown, value: low), System (dropdown with error icon), Software (dropdown with plus icon), Software licence (dropdown with plus icon), Path (text input), Move to production date (calendar icon), Description (text area)
- Buttons: Cancel, Create

Relations

- Impacts: a Web Server impacts all the Web Applications running on it, the Application Solutions it belongs to and all the contacts (Persons or Teams) directly linked to the Web Server.
- Depends on: a Web Server is considered as depending on the system (Server, PC or Virtual machine) on which it runs.

Miscellaneous

Group



Any arbitrary group of CIs. Groups can be used to define explicit sets of configurations items for any documentation purpose. For example when doing an OS migration, it can be convenient to create a group “Servers to be migrated” and to remove the servers from the group as the migration progresses.

Group Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Status	Possible values: Implementation, Obsolete, Production	Yes
Organization	Foreign key to a(n) Organization	Yes
Type	Alphanumeric string	No
Description	Multiline character string	No
Parent Group	Foreign key to a parent Group	No

Tabs

Tab	Description
Linked CIs	All the configuration items linked to this group

Creating a new Group

Location



A Location object in iTop is used to document the physical location of other configuration items. A Location basically has an address and therefore is most often used to describe a physical site. It is a good practice to ensure that for a given Organization, Location names are unique.

Location Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Status	Possible values: Active, Inactive	No
Owner organization	Foreign key to a(n) Organization	Yes
Address	Multiline character string	No
Postal code	Alphanumeric string	No
City	Alphanumeric string	No
Country	Alphanumeric string	No

Tabs

Tab	Description
Contacts	All the contacts located on this location
Devices	All the devices in this location

Creating a new Location

OS Licence



A licence contract for a particular operating system. The licence is related to one operating system (for example Windows 2008 R2) and can be associated with several servers or virtual machines.

OS Licence Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
OS version	Foreign key to a(n) OS Version	Yes
Organization	Foreign key to a(n) Organization	Yes
Usage limit	Alphanumeric string	No
Description	Multiline character string	No
Perpetual	Possible values: no, yes	Yes
Start date	Date (year-month-day)	No
End date	Date (year-month-day)	No
Key	Alphanumeric string	No

Tabs

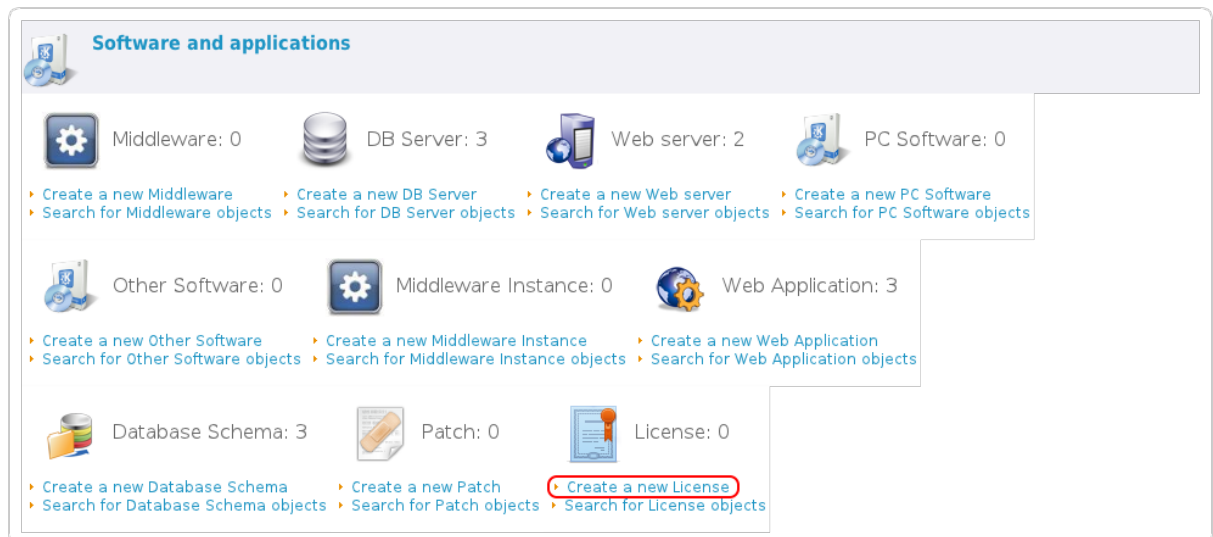
Tab	Description
Documents	All the documents linked to this licence
servers	All the servers where this licence is used
Virtual machines	All the virtual machines where this licence is used

Creating a new OS Licence

Click on the “Overview” menu:



And click on “Create a new License” in the dashboard:



Then select “OSLicence” in the form below:

Select the type of License to create:

And click “Apply” to display the OS Licence creation form:

The screenshot shows a configuration window with the following fields and controls:

- Buttons:** 'Cancel' and 'Create' at the top left and bottom left.
- Tabs:** 'Properties' (selected), 'Documents', 'servers', 'Virtual machines'.
- Name:** Text input field with a red warning icon.
- OS version:** Dropdown menu with '-- select one --' and a red warning icon.
- Organization:** Dropdown menu with '-- select one --', a red warning icon, and a '+' icon.
- Usage limit:** Text input field.
- Description:** Large text area.
- Perpetual:** Dropdown menu with 'no' selected.
- Start date:** Text input field with a calendar icon.
- End date:** Text input field with a calendar icon.
- Key:** Text input field.

OS Patch



A patch, hotfix, security fix or service pack for a given operating system.

OS Patch Properties

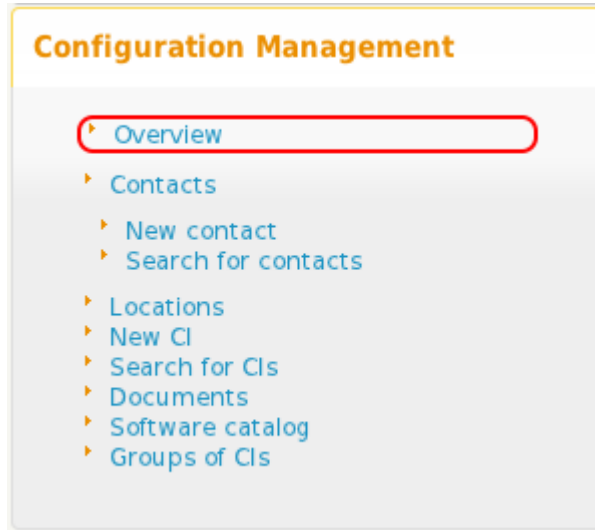
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Description	Multiline character string	No
OS version	Foreign key to a(n) OS Version	Yes

Tabs

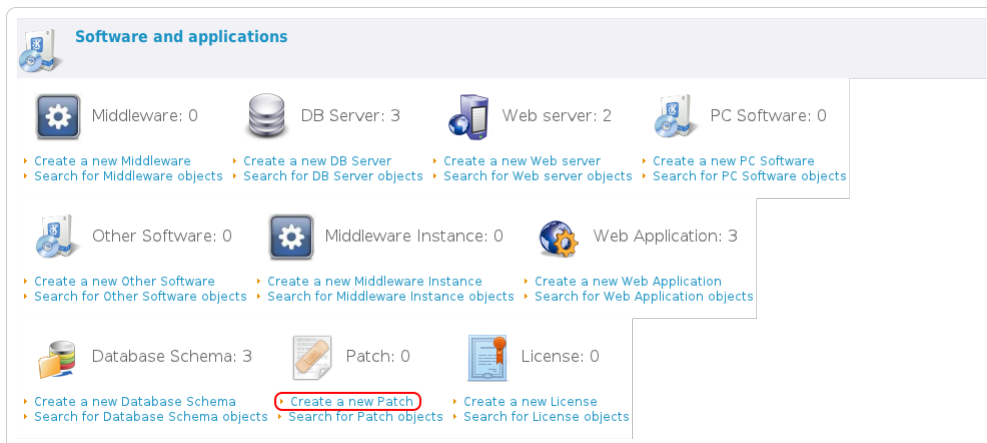
Tab	Description
Documents	All the documents linked to this patch
Devices	All the systems where this patch is installed

Creating a new OS Patch

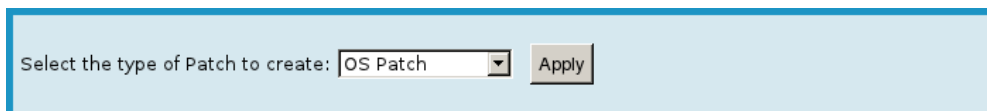
Click on the “Overview” menu:



And click on “Create a new Patch” in the dashboard:



Then select “OSPatch” in the form below:



The image shows a form with the text 'Select the type of Patch to create:'. There is a dropdown menu with 'OS Patch' selected and an 'Apply' button next to it.

And click “Apply” to display the OS Patch creation form:

Organization



The Organization is the base entity for the ownership of configuration items in iTop. Organizations are also used in iTop to document customers, providers, and organizational units within the same company. To describe complex structures, Organizations can be arranged into a hierarchy (by use of the optional “Parent” field).

Organization Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Code	Alphanumeric string	No
Status	Possible values: Active, Inactive	No
Parent	Foreign key to a parent Organization	No
Delivery model	Foreign key to a(n) Delivery Model	No

Creating a new Organization

Physical Interface



A physical network interface on a physical server, as opposed to virtual interfaces that are defined at the software level either in operating systems or virtual machines.

Physical Interface Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Device	Foreign key to a(n) Connectable CI	Yes
IP address	IP address	No
MAC address	Alphanumeric string	No
Comment	Multiline character string	No
IP gateway	IP address	No
IP mask	IP address	No
Speed	Decimal value (could be negative)	No

Software



A generic item of a software in the software catalog. Software instances installed on a particular system always refer to a given Software. iTop splits the softwares in 5 categories: DB Servers, Middlewares, PC Softwares, Web Servers and Other Softwares.

Software Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
vendor	Alphanumeric string	Yes
Version	Alphanumeric string	Yes

Type Possible values: DB Server, Middleware, Other Software, PC Software, Web Server No

Tabs

Tab	Description
Documents	All the documents linked to this software
Software Instances	All the software instances for this software
Software Patches	All the patches for this software
Software Licences	All the licences for this software

Software Licence



A licence contract for a particular software. The licence is related to one software (for example MS Office 2010) and can be associated with several instances of this software.

Software Licence Properties

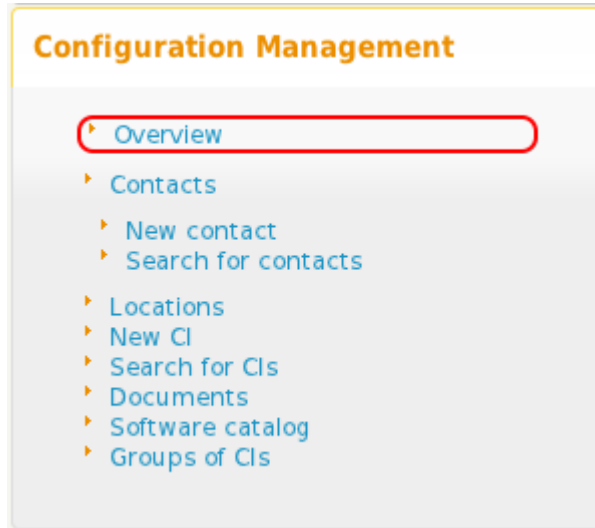
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Software	Foreign key to a(n) Software	Yes
Organization	Foreign key to a(n) Organization	Yes
Usage limit	Alphanumeric string	No
Description	Multiline character string	No
Perpetual	Possible values: no, yes	Yes
Start date	Date (year-month-day)	No
End date	Date (year-month-day)	No
Key	Alphanumeric string	No

Tabs

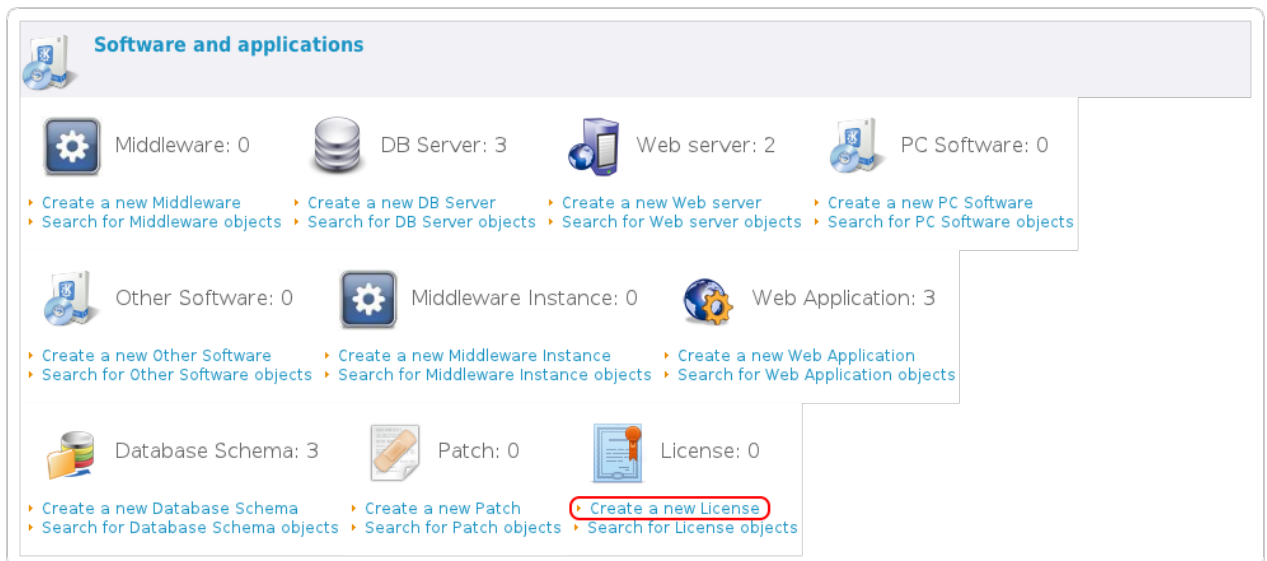
Tab	Description
Documents	All the documents linked to this licence
Software instances	All the systems where this licence is used

Creating a new Software Licence

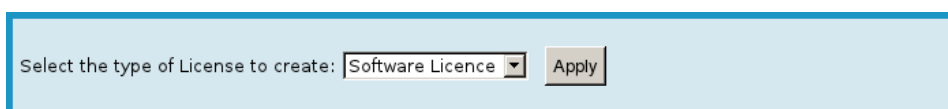
Click on the “Overview” menu:



And click on “Create a new License” in the dashboard:



Then select “SoftwareLicence” in the form below:



The image shows a form with a dropdown menu and an 'Apply' button. The dropdown menu is set to 'Software Licence'.

Select the type of License to create:

And click “Apply” to display the Software Licence creation form:

Software Patch



A patch, hotfix, security fix or service pack for a given software.

Software Patch Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Software	Foreign key to a(n) Software	Yes
Description	Multiline character string	No

Tabs

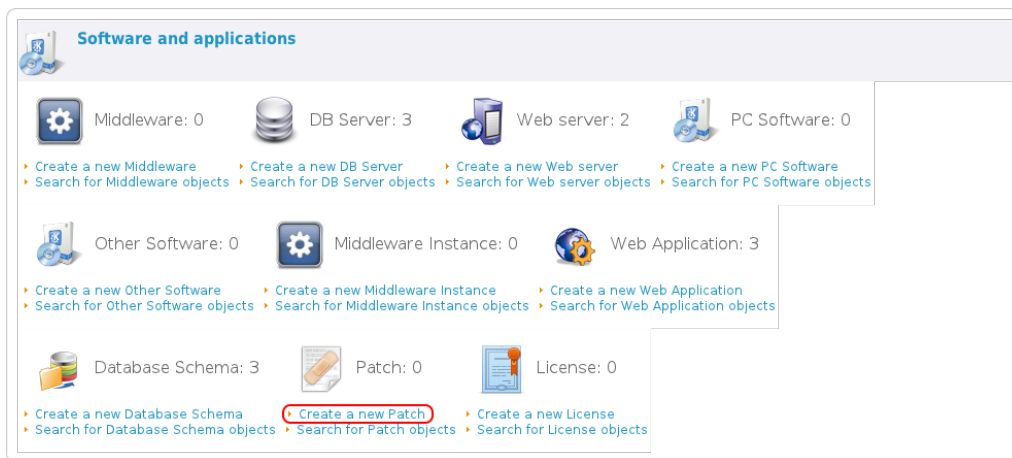
Tab	Description
Documents	All the documents linked to this patch
Software instances	All the systems where this software patch is installed

Creating a new Software Patch

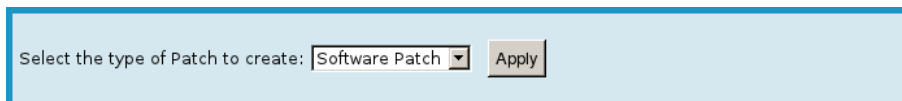
Click on the “Overview” menu:



And click on “Create a new Patch” in the dashboard:



Then select “SoftwarePatch” in the form below:



The image shows a form with the text 'Select the type of Patch to create:'. There is a dropdown menu with 'Software Patch' selected and an 'Apply' button next to it.

And click “Apply” to display the Software Patch creation form:

Subnet



An IP subnet.

Subnet Properties

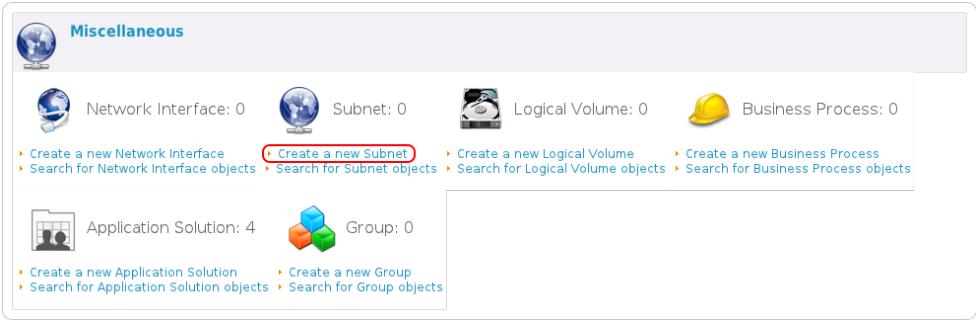
Name	Type	Mandatory?
IP	IP address	Yes
IP Mask	IP address	Yes
Owner organization	Foreign key to a(n) Organization	Yes
Description	Multiline character string	No

Creating a new Subnet

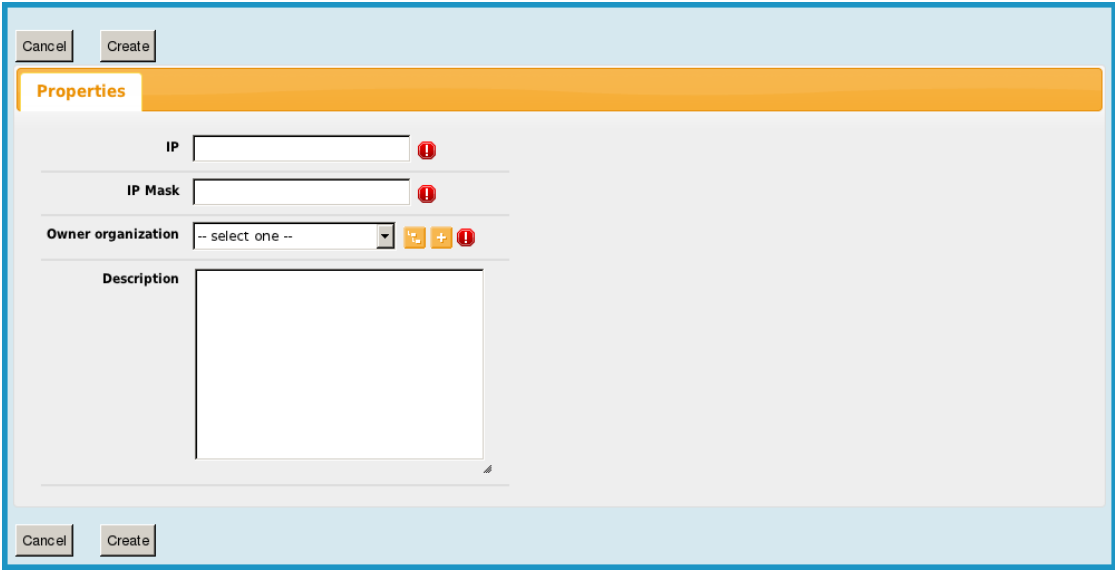
Click on the “Overview” menu:



And click on “Create a new Subnet” in the dashboard:



To display the following form:



Typology

Type	Description
Brand	The possible values for the “Brand” of a device.
Contact Type	Possible values for the “role” of a Person inside a Team or a Delivery Model.
Document Type	
IOS Version	Possible values for the types of operating system for network devices (from Cisco's Internetwork Operating System).
Model	The possible values for the “Model” of a device. The list of models is organized per brand in iTop.
Network Device Type	The possible values for the “Type” of a Network Device (e.g. Router, Switch, Firewall, etc.)
OS Family	<p>The possible values for the “OS Family” attribute of Servers, Virtual Machines and PCs. A sample list can be:</p> <ul style="list-style-type: none">* CentOS* Debian* Fedora* HP-UX* MacOS X* RedHat* Solaris* SuSE* Ubuntu* Windows
OS Version	<p>The possible values for the “OS Version” of a computer. The OS Versions are organized per OS Family in iTop.</p> <p>For example if you define the OS Type “MacOS X”, the versions for this OS Type can be:</p> <ul style="list-style-type: none">* 10.0 - Cheetah* 10.1 - Puma* 10.2 - Jaguar* 10.3 - Panther* 10.4 - Tiger, etc. <p>Whereas for the OS Type “Windows”, the versions can be something like:</p> <ul style="list-style-type: none">* XP* XP SP1* XP SP2* XP SP3* Vista* Vista SP1

- * Vista SP2
- * 7
- * 7 SP 1
- * Server 2008
- * Server 2008 R2
- * Server 2012, etc.

End User Devices management Module

IP Phone



This object is used to document IP telephones that are connected directly to an Ethernet network.

IP Phone Properties

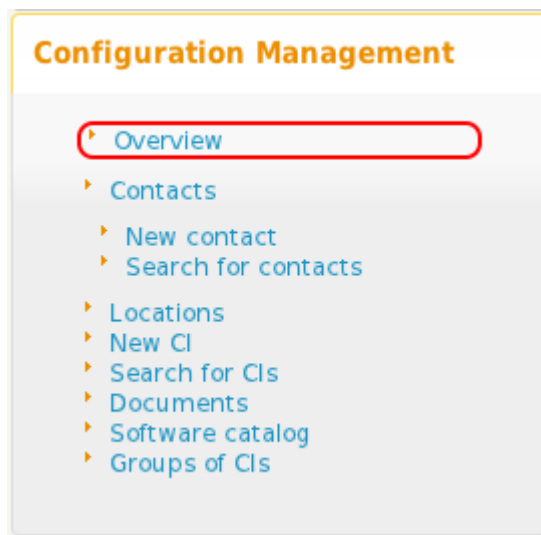
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
Phone number	Alphanumeric string	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

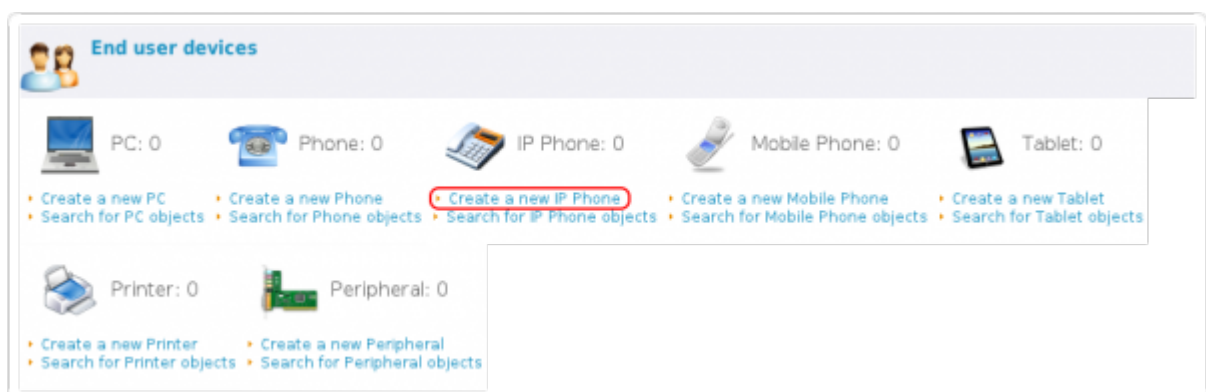
Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new IP Phone

Click on the “Overview” menu:



And click on “Create a new IP Phone” in the dashboard:



To display the following form:

Cancel Create

Properties Contacts Documents Tickets Provider contracts

Name !

Organization - + !

Status

Business criticality

Location +

Brand +

Model +

Phone number

Serial number

Asset number

Move to production date - +

Purchase date - +

End of warranty - +

Description

Cancel Create

Relations

- Impacts: an IP Phone impacts the Application Solutions that this IP Phone is part of and all the contacts (Persons, Teams) directly linked to the IP Phone.
- Depends on: nothing. An IP Phone has no dependencies.

Mobile Phone



This object is used to document mobile (wireless) telephones.

Mobile Phone Properties

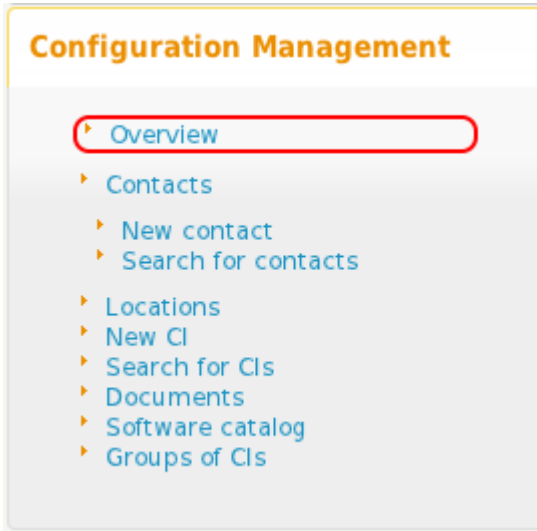
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
Phone number	Alphanumeric string	No
IMEI	Alphanumeric string	No
Hardware PIN	Alphanumeric string	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

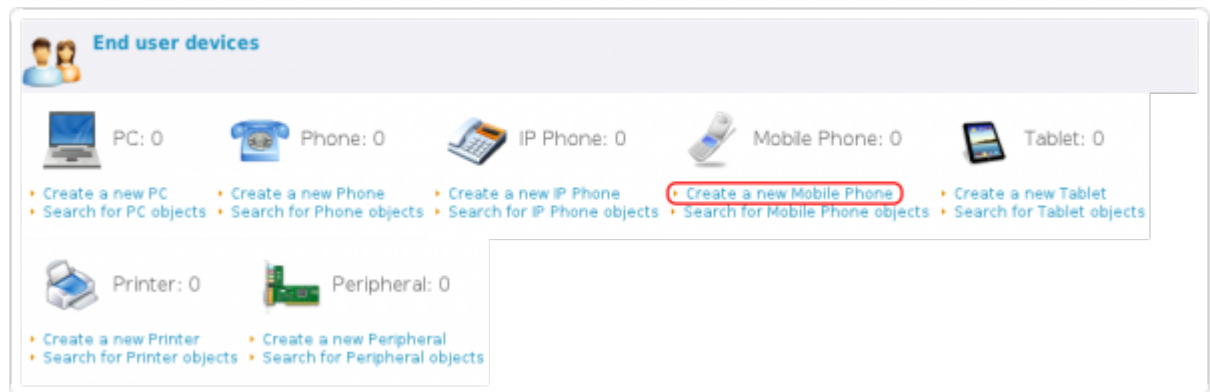
Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new Mobile Phone

Click on the “Overview” menu:



And click on “Create a new Mobile Phone” in the dashboard:



To display the following form:

Relations

- Impacts: a Mobile Phone impacts the Application Solutions that this Mobile Phone is part of and all the contacts (Persons, Teams) directly linked to the Mobile Phone.
- Depends on: nothing. A Mobile Phone has no dependencies.

PC



This object is used to document both desktop and laptop Personal Computers.

PC Properties

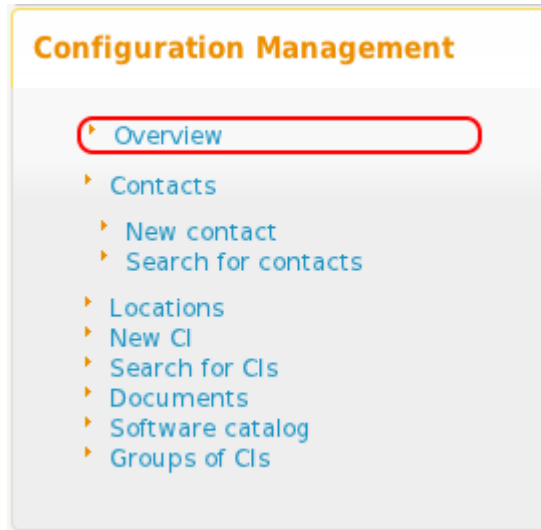
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
OS family	Foreign key to a(n) OS Family	No
OS version	Foreign key to a(n) OS Version	No
Type	Possible values: desktop, laptop	No
CPU	Alphanumeric string	No
RAM	Alphanumeric string	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Softwares	All the softwares installed on this configuration item
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Network interfaces	All the physical network interfaces
Network devices	All network devices connected to this device
Provider contracts	All the provider contracts for this configuration item

Creating a new PC

Click on the “Overview” menu:



And click on “Create a new PC” in the dashboard:



To display the following form:

The screenshot shows a web-based form for creating or editing a 'Provider contract'. The form is organized into several sections:

- General Informations:** Includes fields for Name (with a red warning icon), Organization (dropdown with warning icon), Status (set to 'production'), Business criticality (set to 'low'), and Location (dropdown with a plus icon).
- More informations:** Includes Brand, Model, OS family, and OS version (all dropdowns with plus icons), Type (radio buttons for 'desktop' and 'laptop'), CPU, RAM, Serial number, and Asset number (all text input fields).
- Date:** Includes Move to production date, Purchase date, and End of warranty (all date input fields).
- Other Informations:** Includes a large text area for Description.

The form has 'Cancel' and 'Create' buttons at the top and bottom. The 'Provider contracts' tab is active in the top navigation bar.

Relations

- Impacts: a PC impacts the Application Solutions that this PC is part of, all the PC Softwares running on the PC and all the contacts (Persons, Teams) directly linked to the PC.
- Depends on: a PC depends on the Network Devices which are connected to it.

Peripheral



This object is used to document in iTop any kind of computer peripheral, for example: external hard drives, scanners, input devices (trackballs, bar code scanners), etc...

Peripheral Properties

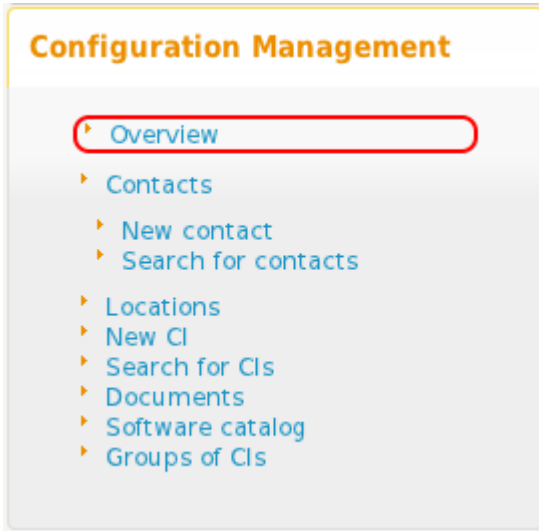
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new Peripheral

Click on the “Overview” menu:



And click on “Create a new Peripheral” in the dashboard:



To display the following form:

Cancel Create

Properties Contacts Documents Tickets Provider contracts

Name !

Organization -- select one -- - + !

Status production

Business criticality low

Location -- select one -- +

Brand -- select one -- +

Model -- select one -- +

Serial number

Asset number

Move to production date 📅

Purchase date 📅

End of warranty 📅

Description

Cancel Create

Relations

- Impacts: a Peripheral impacts the Application Solutions that this Peripheral is part of and all the contacts (Persons, Teams) directly linked to the Peripheral.
- Depends on: nothing. A Peripheral has no dependencies.

Phone



A plain old wired telephone

Phone Properties

Name

Type

Mandatory?

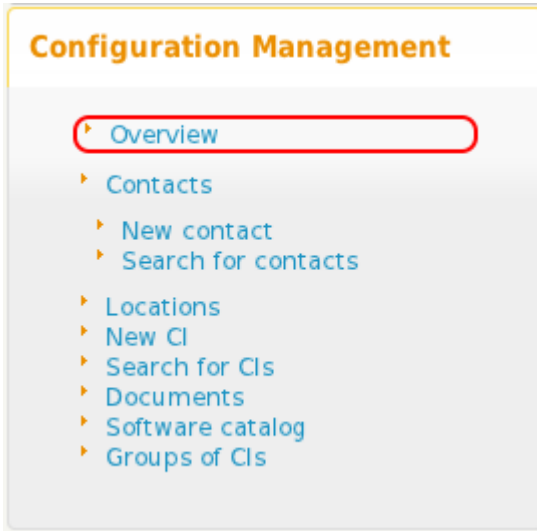
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
Phone number	Alphanumeric string	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new Phone

Click on the “Overview” menu:



And click on “Create a new Phone” in the dashboard:



To display the following form:

Cancel Create

Properties Contacts Documents Tickets Provider contracts

Name !

Organization + + !

Status

Business criticality

Location +

Brand +

Model +

Phone number

Serial number

Asset number

Move to production date +

Purchase date +

End of warranty +

Description

Cancel Create

Relations

- Impacts: a Phone impacts the Application Solutions that this Phone is part of and all the contacts (Persons, Teams) directly linked to the Phone.
- Depends on: nothing. A Phone has no dependencies.

Printer



A personal printer connected either to the network or to a PC.

Printer Properties

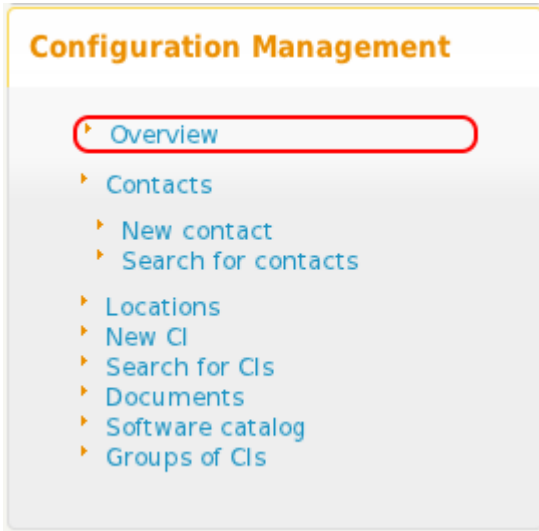
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

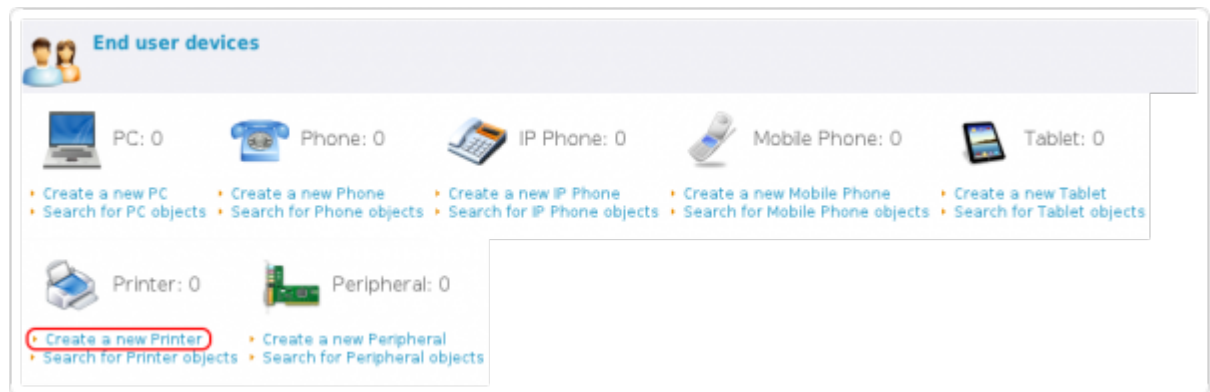
Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Network interfaces	All the physical network interfaces
Network devices	All network devices connected to this device
Provider contracts	All the provider contracts for this configuration item

Creating a new Printer

Click on the “Overview” menu:



And click on “Create a new Printer” in the dashboard:



To display the following form:

Relations

- Impacts: a Printer impacts the Application Solutions that this Printer is part of and all the contacts (Persons, Teams) directly linked to the Printer.
- Depends on: nothing. A Printer has no dependencies.

Tablet



A tablet PC (iPad, Galaxy Note/Tab, Nexus, Kindle...)

Tablet Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Brand	Foreign key to a(n) Brand	No

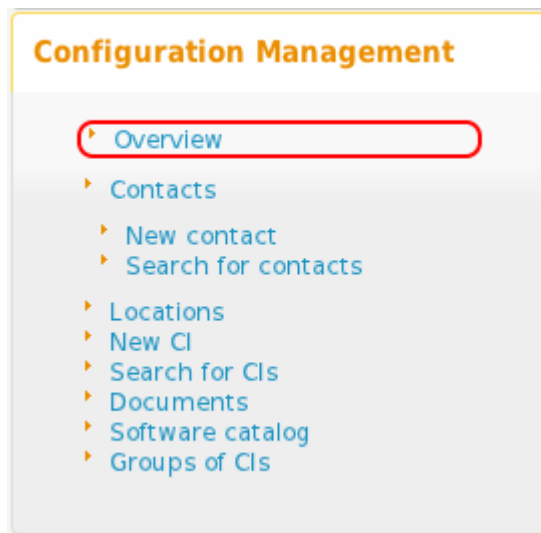
Model	Foreign key to a(n) Model	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Tickets	All the tickets for this configuration item
Documents	All the documents linked to this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new Tablet

Click on the “Overview” menu:



And click on “Create a new Tablet” in the dashboard:



To display the following form:

The screenshot shows a "Create" form for a device. It features a "Cancel" and "Create" button at the top left. The form has five tabs: "Properties" (selected), "Contacts", "Tickets", "Documents", and "Provider contracts". The "Properties" tab contains the following fields:

- Name**: Text input field with a red warning icon.
- Organization**: Dropdown menu with "-- select one --" and a red warning icon.
- Status**: Dropdown menu with "production" selected.
- Business criticality**: Dropdown menu with "low" selected.
- Location**: Dropdown menu with "-- select one --" and a plus icon.
- Brand**: Dropdown menu with "-- select one --" and a plus icon.
- Model**: Dropdown menu with "-- select one --" and a plus icon.
- Serial number**: Text input field.
- Asset number**: Text input field.
- Move to production date**: Text input field with a calendar icon.
- Purchase date**: Text input field with a calendar icon.
- End of warranty**: Text input field with a calendar icon.
- Description**: Large text area.

At the bottom left, there are "Cancel" and "Create" buttons.

Relations

- Impacts: a Tablet impacts the Application Solutions that this Tablet is part of and all the contacts (Persons, Teams) directly linked to the Tablet.

- Depends on: nothing. A Tablet has no dependencies.

Virtualization Management Module

Farm



A Farm (or cluster) is a group of Hypervisors pooled together and sharing storage resources to provide an overall fault tolerant system for hosting Virtual Machines.

Farm Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Business criticality	Possible values: high, low, medium	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Application solutions	All the application solutions depending on this configuration item
Logical volumes	All the logical volumes used by this device
Hypervisors	All the hypervisors that compose this farm
Virtual machines	All the virtual machines hosted by this host
Provider contracts	All the provider contracts for this configuration item

Creating a new Farm

Click on the “Overview” menu:

Relations

- Impacts: a Farm impacts its Virtual Machines, the Application Solutions which this Farm is part of and all the contacts (Persons, Teams) directly linked to the Farm.
- Depends on: a Farm depends on the related Hypervisors and Logical Volumes.

Hypervisor



An hypervisor is a virtualization software (MS Hyper-V, VMWare ESX, Xen, etc.), running on a physical Server and supporting the creation of Virtual Machines.

Hypervisor Properties

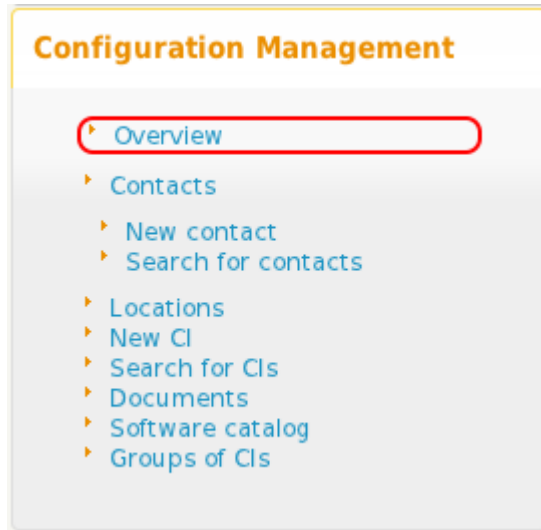
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Server	Foreign key to a(n) Server	No
Farm	Foreign key to a(n) Farm	No
Business criticality	Possible values: high, low, medium	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

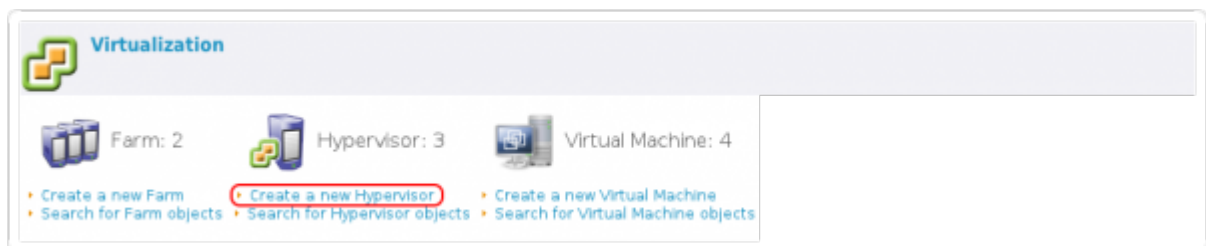
Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Application solutions	All the application solutions depending on this configuration item
Logical volumes	All the logical volumes used by this device
Virtual machines	All the virtual machines hosted by this host
Provider contracts	All the provider contracts for this configuration item

Creating a new Hypervisor

Click on the “Overview” menu:



And click on “Create a new Hypervisor” in the dashboard:



To display the following form:

The screenshot shows a software interface for creating a 'Provider contract'. At the top, there are 'Cancel' and 'Create' buttons. Below them is a navigation bar with tabs: 'Properties', 'Contacts', 'Documents', 'Tickets', 'Application solutions', 'Logical volumes', and 'Virtual machines'. The 'Provider contracts' tab is selected. The form contains the following fields:

- Name:** A text input field with a red information icon to its right.
- Organization:** A dropdown menu with '-- select one --' and a red information icon to its right.
- Server:** A dropdown menu with '-- select one --' and a plus icon to its right.
- Farm:** A dropdown menu with '-- select one --' and a plus icon to its right.
- Business criticality:** A dropdown menu with 'low' selected.
- Move to production date:** A date input field with a calendar icon to its right.
- Description:** A large text area.

At the bottom of the form, there are 'Cancel' and 'Create' buttons.

Relations

- Impacts: an Hypervisor impacts the Farms that use it, the Virtual machines running on the Hypervisor, the Application Solutions which this Hypervisor is part of and all the contacts (Persons, Teams) directly linked to the Hypervisor.
- Depends on: an Hypervisor depends on the related Logical Volumes and the Server which hosts this Hypervisor.

Logical Interface



A network interface for a Virtual Machine.

Logical Interface Properties

Name	Type	Mandatory?
IP address	IP address	No
MAC address	Alphanumeric string	No
Comment	Multiline character string	No

IP gateway	IP address	No
IP mask	IP address	No
Speed	Decimal value (could be negative)	No
Virtual machine	Foreign key to a(n) Virtual Machine	Yes

Virtual Machine



A Virtual Machine is the virtual equivalent to a Server, it is hosted either on an Hypervisor or on a Farm.

Virtual Machine Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Virtual host	Foreign key to a(n) Virtual Host	Yes
OS family	Foreign key to a(n) OS Family	No
OS version	Foreign key to a(n) OS Version	No
OS licence	Foreign key to a(n) OS Licence	No
CPU	Alphanumeric string	No
RAM	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Softwares	All the softwares installed on this configuration item
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item

Application solutions All the application solutions depending on this configuration item

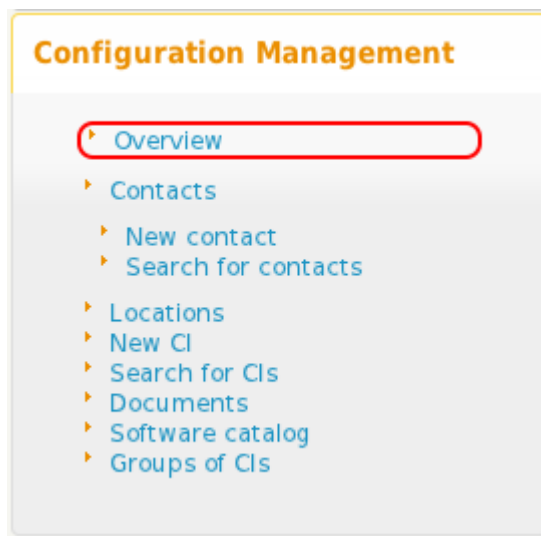
Network Interfaces All the logical network interfaces

Logical volumes All the logical volumes used by this device

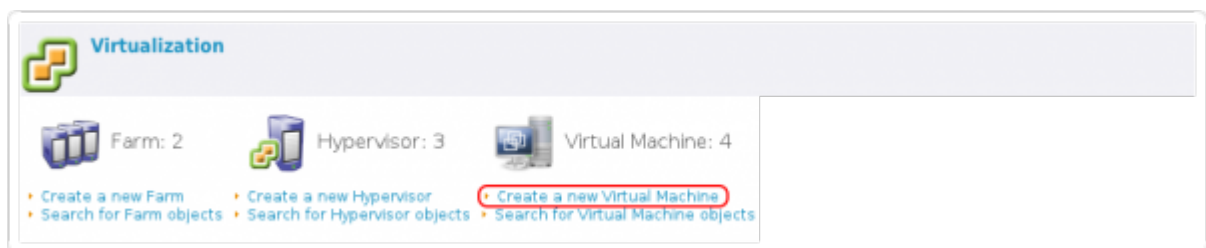
Provider contracts All the provider contracts for this configuration item

Creating a new Virtual Machine

Click on the “Overview” menu:



And click on “Create a new Virtual Machine” in the dashboard:



To display the following form:

Relations

- Impacts: a Virtual Machine impacts the software instances running on it, the Application Solutions which this VM is part of and all the contacts (Persons, Teams) directly linked to the VM.
- Depends on: a Virtual Machine depends on the related Logical Volumes and the Hypervisor or Farm on which the VM runs.

Advanced Storage Management Module

Fiber Channel Interface



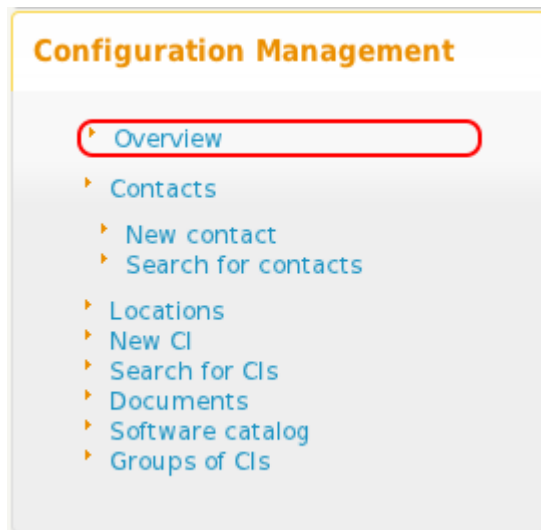
A Fibre Channel Interface, is a network interface to a high-speed network technology primarily used for connecting shared storage devices (Storage Systems in iTop).

Fiber Channel Interface Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Device	Foreign key to a(n) Datacenter Device	Yes
Speed	Decimal value (could be negative)	No
Topology	Alphanumeric string	No
WWN	Alphanumeric string	No

Creating a new Fiber Channel Interface

Click on the “Overview” menu:



And click on “Create a new Fiber Channel Interface” in the dashboard:

To display the following form:

Logical Volume



The unit of storage managed inside a Storage System.

Logical Volume Properties

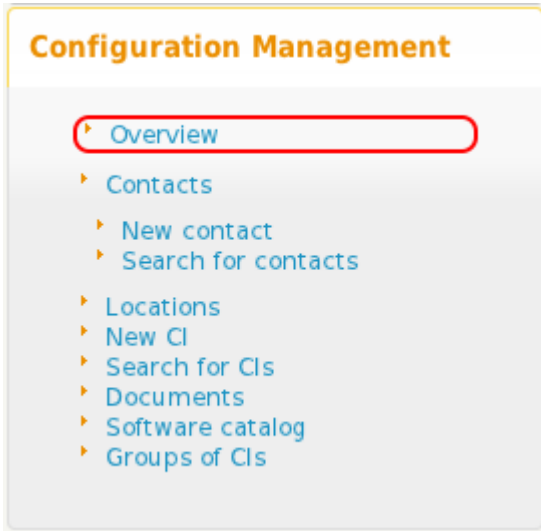
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
LUN ID	Alphanumeric string	Yes
Description	Multiline character string	No
Storage system	Foreign key to a(n) Storage System	Yes
Raid level	Alphanumeric string	No
Size	Alphanumeric string	No

Tabs

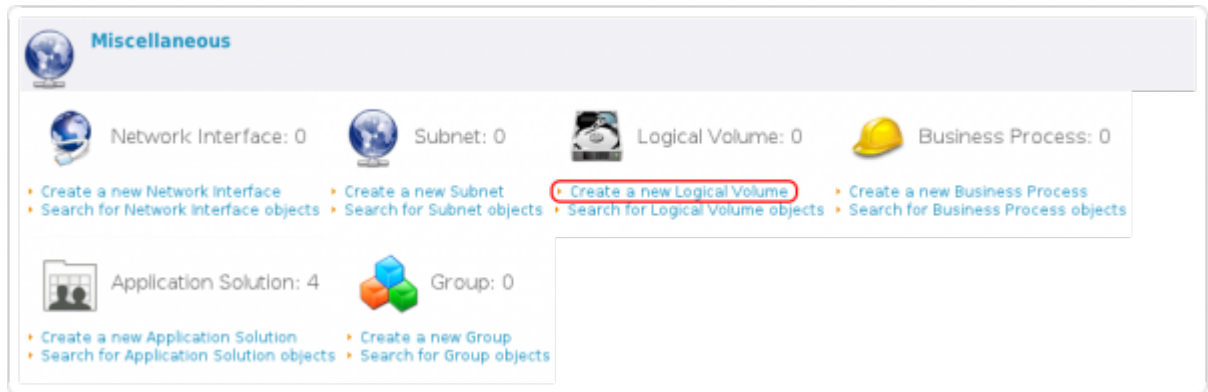
Tab	Description
Servers	All the servers using this volume
Virtual devices	All the virtual devices using this volume

Creating a new Logical Volume

Click on the “Overview” menu:



And click on “Create a new Logical Volume” in the dashboard:



To display the following form:

Relations

- Impacts: a Logical Volume impacts the systems that use it (Servers, Hypervisors, Farms, Virtual Machines).
- Depends on: a Logical Volume depends on its Storage System.

NAS



A Network-Attached Storage system (in short: NAS) is a specialized file server appliance that connects to the network. In iTop a NAS is linked to NAS File Systems.

NAS Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No

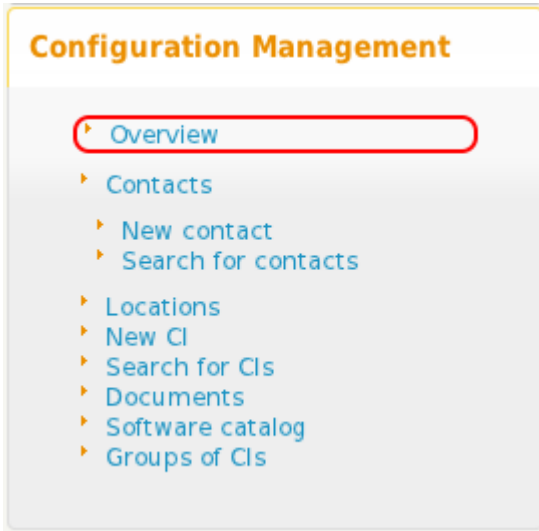
Rack	Foreign key to a(n) Rack	No
Enclosure	Foreign key to a(n) Enclosure	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
NB U	Numeric value (could be negative)	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
PowerA source	Foreign key to a(n) Power Connection	No
PowerB source	Foreign key to a(n) Power Connection	No
Description	Multiline character string	No

Tabs

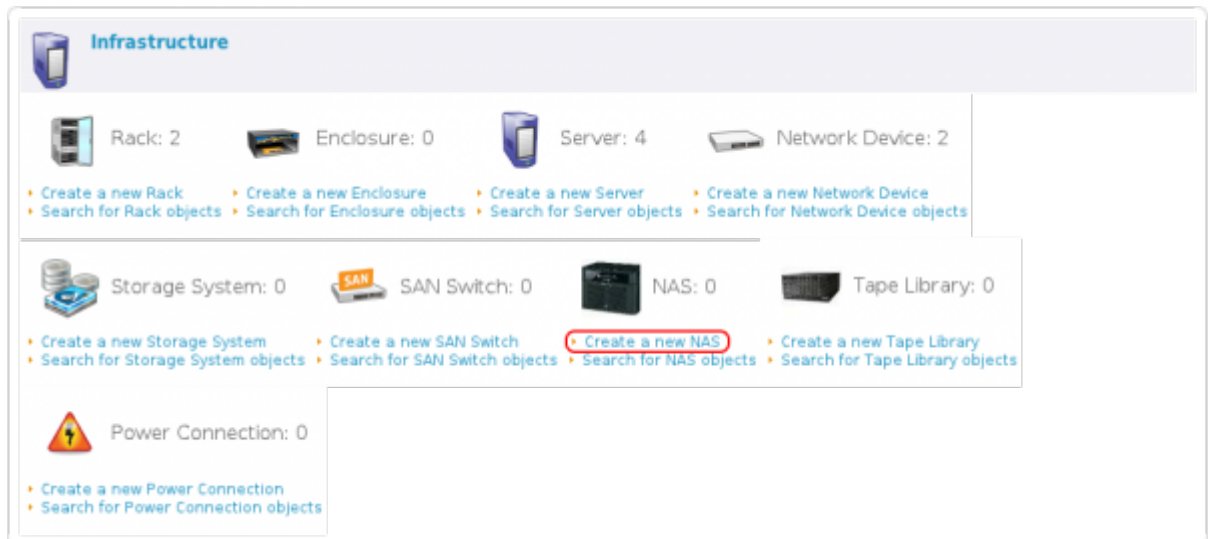
Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Network interfaces	All the physical network interfaces
FC ports	All the fiber channel interfaces for this device
Network devices	All network devices connected to this device
Filesystems	All the file systems in this NAS
Provider contracts	All the provider contracts for this configuration item

Creating a new NAS

Click on the “Overview” menu:



And click on “Create a new NAS” in the dashboard:



To display the following form:

Relations

- Impacts: a NAS impacts its NAS File Systems, the Application Solutions that this NAS is part of and all the contacts (Persons, Teams) directly linked to the NAS.
- Depends on: A NAS depends on the Network Devices and SAN Swiches to which it is connected and the Enclosure in which the NAS is installed (if any).

NAS File System



A NAS File System is the object that represents in iTop a shared file system hosted inside a given NAS.

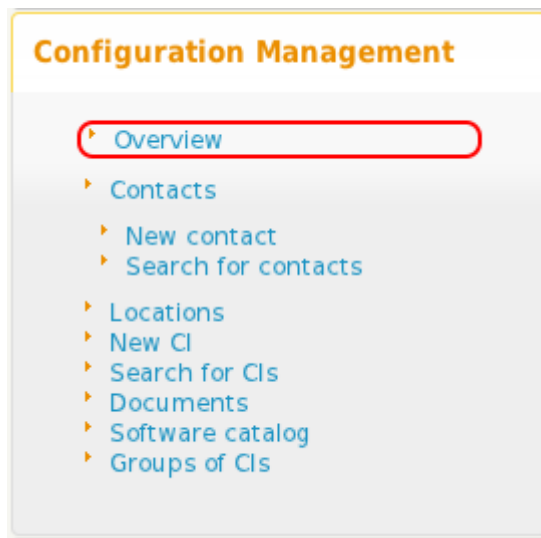
NAS File System Properties

Name	Type	Mandatory?
------	------	------------

Name	Alphanumeric string	Yes
Description	Multiline character string	No
NAS	Foreign key to a(n) NAS	Yes
Raid level	Alphanumeric string	No
Size	Alphanumeric string	No

Creating a new NAS File System

Click on the “Overview” menu:



And click on “Create a new NAS File System” in the dashboard:

To display the following form:

Relations

- Impacts: none.
- Depends on: a NAS File System depends on its NAS.

SAN Switch



A SAN Switch is a network switch compatible with the Fibre Channel protocol used by storage networks.

SAN Switch Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Rack	Foreign key to a(n) Rack	No
Enclosure	Foreign key to a(n) Enclosure	No

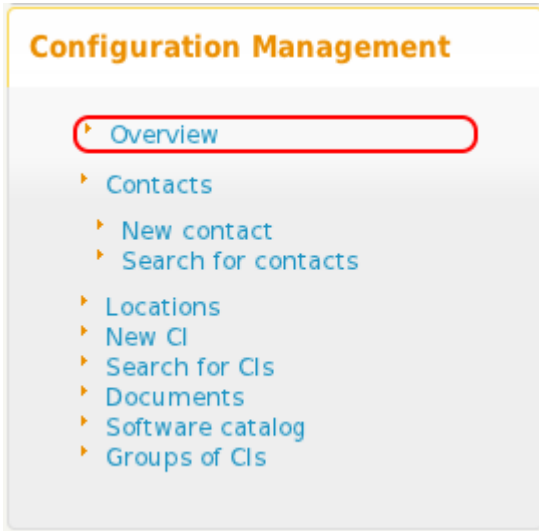
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
NB U	Numeric value (could be negative)	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
PowerA source	Foreign key to a(n) Power Connection	No
PowerB source	Foreign key to a(n) Power Connection	No
Description	Multiline character string	No

Tabs

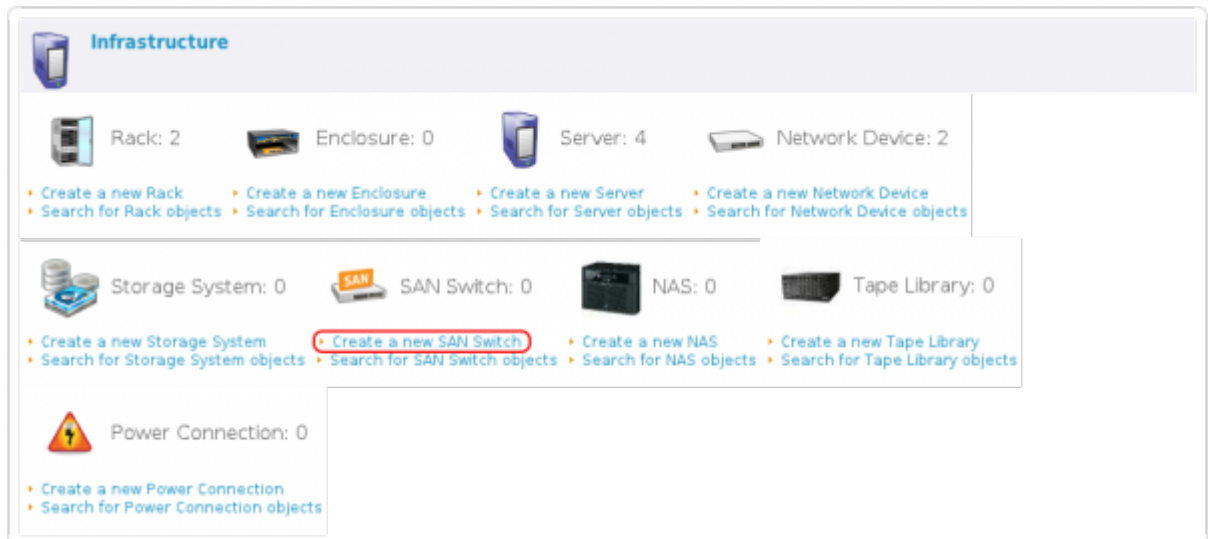
Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Network interfaces	All the physical network interfaces
FC ports	All the fiber channel interfaces for this device
Network devices	All network devices connected to this device
Devices	All the devices connected to this SAN switch
Provider contracts	All the provider contracts for this configuration item

Creating a new SAN Switch

Click on the “Overview” menu:



And click on “Create a new SAN Switch” in the dashboard:



To display the following form:

Cancel Create

Properties Contacts Documents Tickets Network interfaces FC ports Network devices Devices

Provider contracts

General informations

Name ⓘ

Organization -- select one -- ⓘ + ⓘ

Status production

Business criticality low

Location -- select one -- +

Rack -- select one -- +

Enclosure -- select one -- +

Date

Move to production date ⓘ

Purchase date ⓘ

End of warranty ⓘ

Other informations

PowerA source -- select one --

PowerB source -- select one --

Description

More informations

Brand -- select one -- +

Model -- select one -- +

NB U

Serial number

Asset number

Cancel Create

Relations

- Impacts: a SAN Switch impacts the devices connected to it (Network Devices, other SAN Switches, Servers, Tape Libraries, NAS, etc.) the Application Solutions that this SAN Switch is part of and all the contacts (Persons, Teams) directly linked to the SAN Switch.
- Depends on: a SAN Switch depends on the other devices it is connected to (Network Devices and SAN Switches) and the Enclosure in which the SAN Switch is installed (if any).

Storage System



A Storage System is used in iTop to describe any storage system that can be attached either to a SAN or to an Ethernet network. The logical unit of storage managed by a Storage System is a Logical Volume.

Storage System Properties

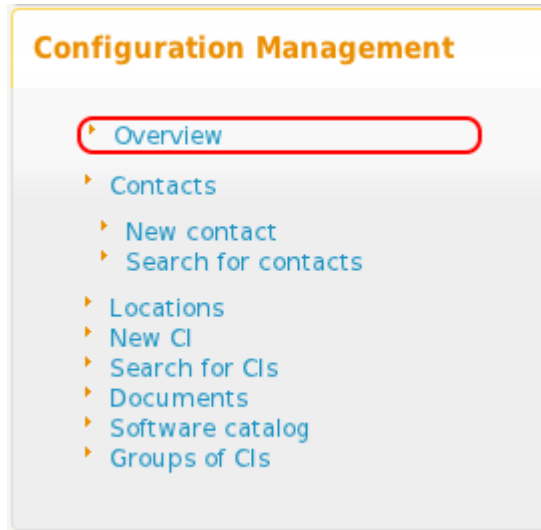
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Rack	Foreign key to a(n) Rack	No
Enclosure	Foreign key to a(n) Enclosure	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
NB U	Numeric value (could be negative)	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
PowerA source	Foreign key to a(n) Power Connection	No
PowerB source	Foreign key to a(n) Power Connection	No
Description	Multiline character string	No

Tabs

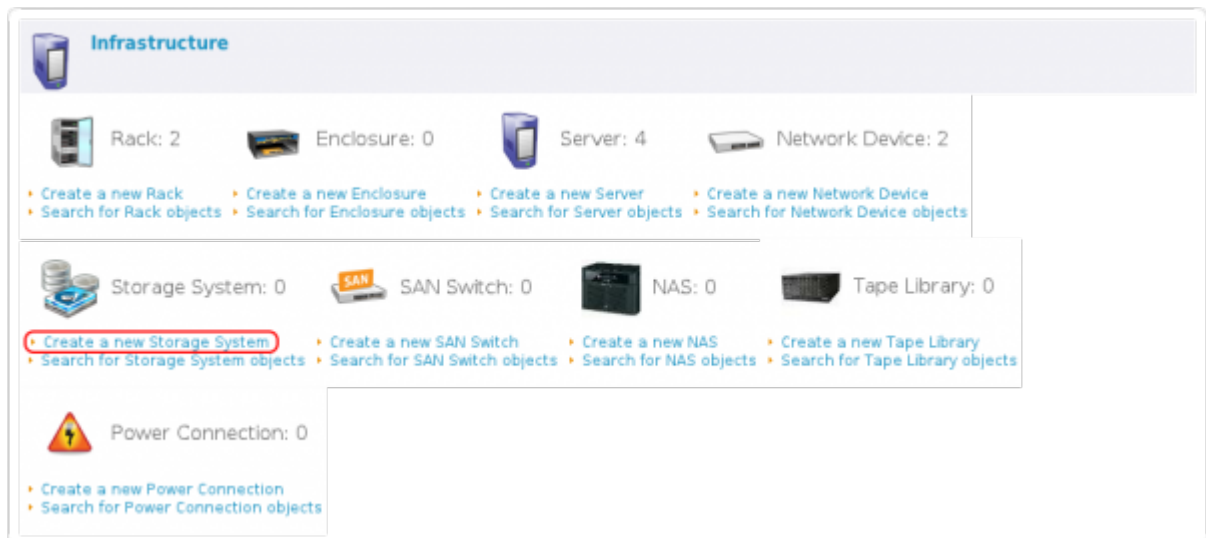
Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Network interfaces	All the physical network interfaces
FC ports	All the fiber channel interfaces for this device
Network devices	All network devices connected to this device
Logical volumes	All the logical volumes in this storage system
SANs	All the SAN switches connected to this device
Provider contracts	All the provider contracts for this configuration item

Creating a new Storage System

Click on the “Overview” menu:



And click on “Create a new Storage System” in the dashboard:



To display the following form:

Relations

- Impacts: a Storage System impacts the Logical Volumes hosted on it, the Application Solutions that this Storage System is part of and all the contacts (Persons, Teams) directly linked to the Storage System.
- Depends on: a Storage System depends on the network devices it is connected to (Network Devices and SAN Switches) and the Enclosure in which the Storage System is installed (if any).

Tape



A magnetic tape (or cartridge) hosted inside a Tape Library.

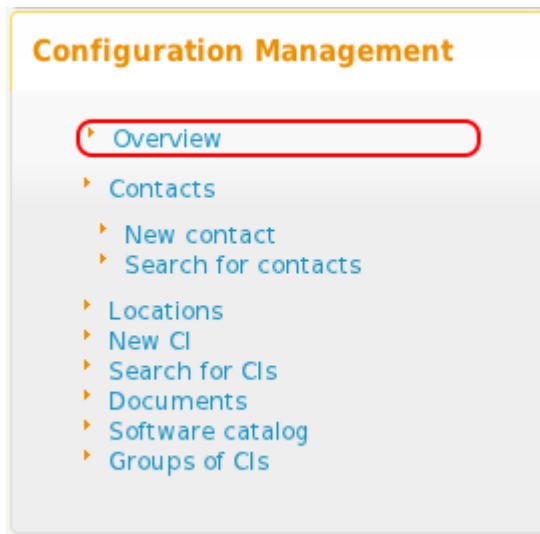
Tape Properties

Name	Type	Mandatory?
------	------	------------

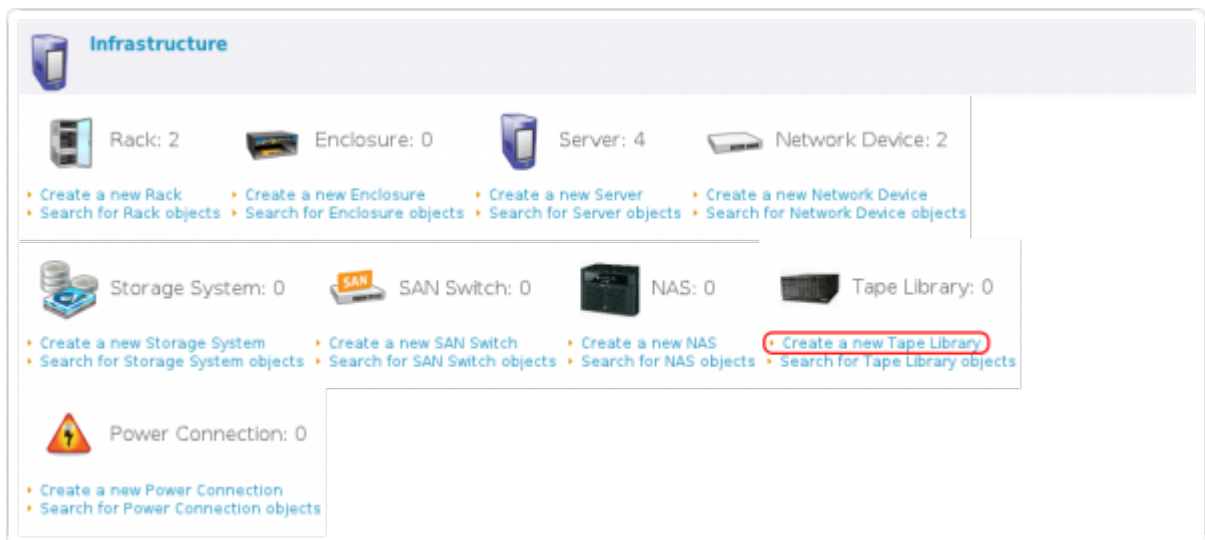
Name	Alphanumeric string	Yes
Description	Multiline character string	No
Tape library	Foreign key to a(n) Tape Library	Yes
Size	Alphanumeric string	No

Creating a new Tape

Click on the “Overview” menu:



And click on “Create a new Tape” in the dashboard:



To display the following form:

Relations

- Impacts: none.
- Depends on: the Tape Library in which this Tape is stored.

Tape Library

A Tape Library is a storage device which contains one or more tape drives, a number of slots to hold tape cartridges and an automated method for loading tapes. Tape Libraries are used for data backup or archiving.

Tape Library Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Rack	Foreign key to a(n) Rack	No
Enclosure	Foreign key to a(n) Enclosure	No
Brand	Foreign key to a(n) Brand	No

Model	Foreign key to a(n) Model	No
NB U	Numeric value (could be negative)	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
PowerA source	Foreign key to a(n) Power Connection	No
PowerB source	Foreign key to a(n) Power Connection	No
Description	Multiline character string	No

Tabs

Tab	Description
Tapes	All the tapes in the tape library
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Network interfaces	All the physical network interfaces
FC ports	All the fiber channel interfaces for this device
Network devices	All network devices connected to this device
Provider contracts	All the provider contracts for this configuration item

Creating a new Tape Library

Click on the “Overview” menu:

Configuration Management

- Overview
- Contacts
 - New contact
 - Search for contacts
- Locations
 - New CI
 - Search for CIs
 - Documents
 - Software catalog
 - Groups of CIs

And click on “Create a new Tape Library” in the dashboard:

Infrastructure

Rack: 2	Enclosure: 0	Server: 4	Network Device: 2
Create a new Rack Search for Rack objects	Create a new Enclosure Search for Enclosure objects	Create a new Server Search for Server objects	Create a new Network Device Search for Network Device objects

Storage System: 0	SAN Switch: 0	NAS: 0	Tape Library: 0
Create a new Storage System Search for Storage System objects	Create a new SAN Switch Search for SAN Switch objects	Create a new NAS Search for NAS objects	Create a new Tape Library Search for Tape Library objects

Power Connection: 0
Create a new Power Connection Search for Power Connection objects

To display the following form:

Cancel Create

Properties Tapes Contacts Documents Tickets Network interfaces FC ports Network devices

Provider contracts

General informations

Name ⓘ

Organization -- select one -- ⓘ + ⓘ

Status production

Business criticality low

Location -- select one -- +

Rack -- select one -- +

Enclosure -- select one -- +

Date

Move to production date ⓘ

Purchase date ⓘ

End of warranty ⓘ

Other informations

PowerA source -- select one --

PowerB source -- select one --

Description

More informations

Brand -- select one -- +

Model -- select one -- +

NB U

Serial number

Asset number

Cancel Create

Relations

- Impacts: a Tape Library impacts the Tapes stored in it, the Application Solutions that this Tape Library is part of and all the contacts (Persons, Teams) directly linked to the Tape Library.
- Depends on: a Tape Library depends on the SAN Switches it is connected to and the Enclosure in which the Tape Library is installed (if any).

Datacenter Management Module

Enclosure



An Enclosure is a cabinet generally fitted with doors and side panels. Enclosures may contain baffles, fans, and other features. They can be mounted inside a Rack or directly fitted on the wall.

Enclosure Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Rack	Foreign key to a(n) Rack	Yes
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
NB U	Numeric value (could be negative)	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Devices	All the devices in this enclosure
Provider contracts	All the provider contracts for this configuration item

Creating a new Enclosure

Click on the “Overview” menu:

Configuration Management

- ▶ Overview
- ▶ Contacts
 - ▶ New contact
 - ▶ Search for contacts
- ▶ Locations
 - ▶ New CI
 - ▶ Search for CIs
- ▶ Documents
- ▶ Software catalog
- ▶ Groups of CIs

And click on “Create a new Enclosure” in the dashboard:

Infrastructure

Rack: 2	Enclosure: 0	Server: 4	Network Device: 2
▶ Create a new Rack ▶ Search for Rack objects	▶ Create a new Enclosure ▶ Search for Enclosure objects	▶ Create a new Server ▶ Search for Server objects	▶ Create a new Network Device ▶ Search for Network Device objects

Storage System: 0	SAN Switch: 0	NAS: 0	Tape Library: 0
▶ Create a new Storage System ▶ Search for Storage System objects	▶ Create a new SAN Switch ▶ Search for SAN Switch objects	▶ Create a new NAS ▶ Search for NAS objects	▶ Create a new Tape Library ▶ Search for Tape Library objects

Power Connection: 0
▶ Create a new Power Connection ▶ Search for Power Connection objects

To display the following form:

Cancel
Create

Properties
Contacts
Documents
Tickets
Devices
Provider contracts

Name !

Organization -- select one -- + + !

Status production

Business criticality low

Location -- select one -- +

Rack -- select one -- + !

Brand -- select one -- +

Model -- select one -- +

NB U

Serial number

Asset number

Move to production date 📅

Purchase date 📅

End of warranty 📅

Description

Cancel
Create

Relations

- Impacts: an Enclosure is considered as impacting all the devices (Network Devices, Servers, Storage Systems, etc.) that are located in the Enclosure, the Application Solutions that this Enclosure is part of, as well as the contacts (Persons, Teams) directly linked to the Enclosure.
- Depends on: an Enclosure has no dependencies.

PDU



A PDU (Power Distribution Unit) is a device fitted with multiple outputs designed to distribute electric power, especially to racks of computers and networking equipment located within the data center.

PDU Properties

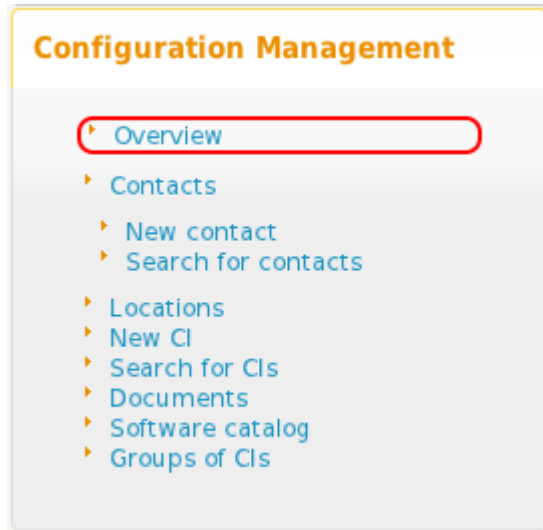
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Rack	Foreign key to a(n) Rack	Yes
Power start	Foreign key to a(n) Power Connection	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

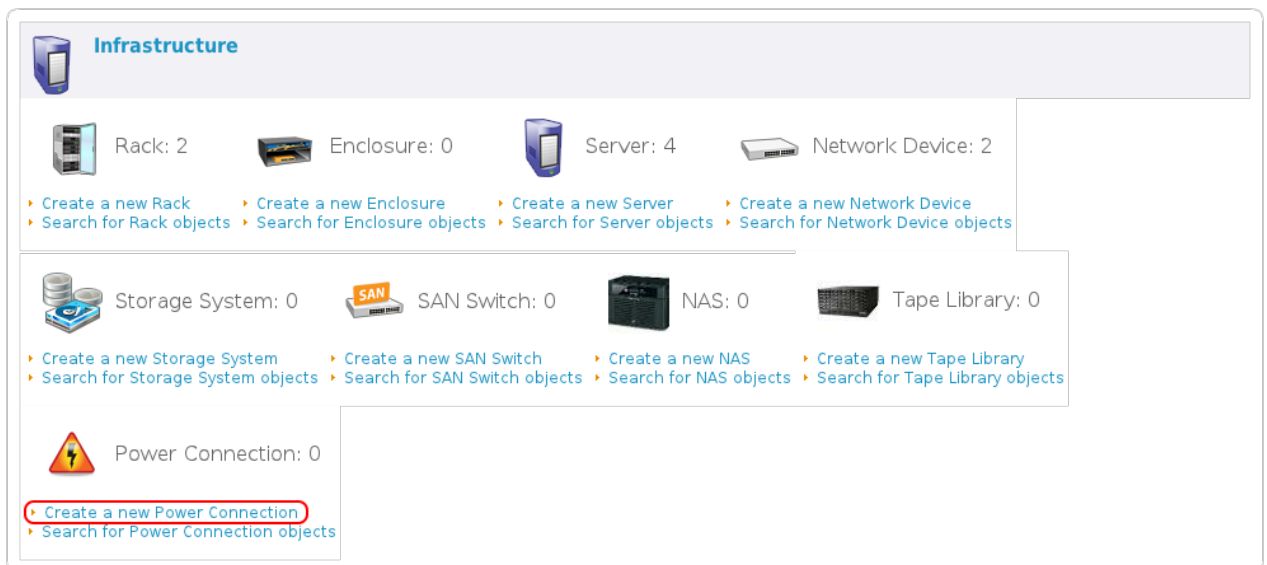
Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new PDU

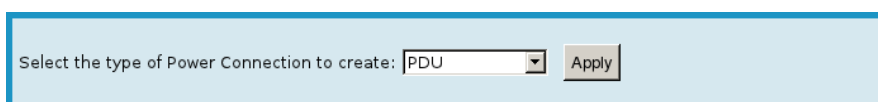
Click on the “Overview” menu:



And click on “Create a new Power Connection” in the dashboard:



Then select “PDU” in the form below:



The image shows a form with a dropdown menu and an 'Apply' button. The dropdown menu is set to 'PDU'. The text reads: 'Select the type of Power Connection to create: PDU Apply'.

And click “Apply” to display the PDU creation form:

Cancel
Create

Properties
Contacts
Documents
Tickets
Provider contracts

Name !

Organization -- select one -- + + !

Status production

Business criticality low

Location -- select one -- +

Rack -- select one -- + !

Power start -- select one --

Brand -- select one -- +

Model -- select one -- +

Serial number

Asset number

Move to production date 📅

Purchase date 📅

End of warranty 📅

Description

Cancel
Create

Relations

- Impacts: an PDU is considered as impacting all the devices (Network Devices, Servers, Storage Systems, etc.) that are connected to the PDU, other PDUs connected to this one, the Application Solutions that this PDU is part of, as well as the contacts (Persons, Teams) directly linked to the Enclosure.
- Depends on: a PDU has no dependencies.

Power Source



A Power Source is used to document in iTop any kind of power source (main power inlet, breaker...) that is not a PDU.

Power Source Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

Tab	Description
PDUs	All the PDUs using this power source
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Provider contracts	All the provider contracts for this configuration item

Creating a new Power Source

Click on the “Overview” menu:

Configuration Management

- Overview
- Contacts
 - New contact
 - Search for contacts
- Locations
 - New CI
 - Search for CIs
- Documents
- Software catalog
- Groups of CIs

And click on “Create a new Power Connection” in the dashboard:

Infrastructure

Rack: 2	Enclosure: 0	Server: 4	Network Device: 2
Create a new Rack	Create a new Enclosure	Create a new Server	Create a new Network Device
Search for Rack objects	Search for Enclosure objects	Search for Server objects	Search for Network Device objects

Storage System: 0	SAN Switch: 0	NAS: 0	Tape Library: 0
Create a new Storage System	Create a new SAN Switch	Create a new NAS	Create a new Tape Library
Search for Storage System objects	Search for SAN Switch objects	Search for NAS objects	Search for Tape Library objects

Power Connection: 0
Create a new Power Connection
Search for Power Connection objects

Then select “PowerSource” in the form below:

Select the type of Power Connection to create:

And click “Apply” to display the Power Source creation form:

Relations

- Impacts: an Power Source is considered as impacting all the devices (PDUs, Network Devices, Servers, Storage Systems, etc.) that are connected to the Power Source, the Application Solutions that this Power Source is part of, as well as the contacts (Persons, Teams) directly linked to the Power Source.
- Depends on: a Power Source has no dependencies.

Rack



A computer Rack is a metal frame used to hold various hardware devices such as servers, hard disk drives, other electronic equipment. The available space inside a Rack is measured the unit “U” (One U corresponds to 1.75 inches of space between each hole on the metal strips on the sides for screwing the devices in place)

Rack Properties

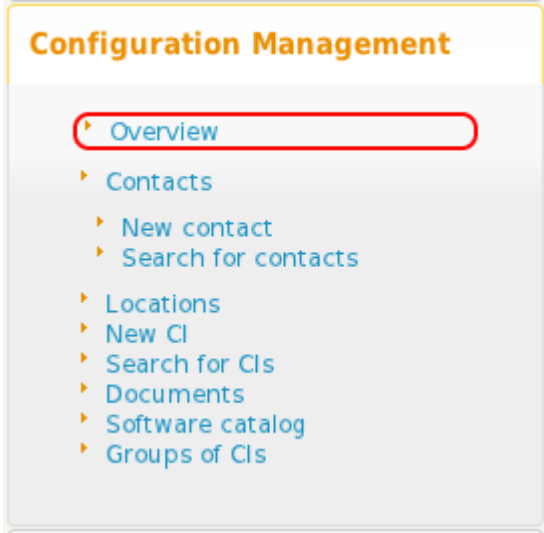
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production, stock	No
Business criticality	Possible values: high, low, medium	No
Location	Foreign key to a(n) Location	No
Brand	Foreign key to a(n) Brand	No
Model	Foreign key to a(n) Model	No
NB U	Numeric value (could be negative)	No
Serial number	Alphanumeric string	No
Asset number	Alphanumeric string	No
Move to production date	Date (year-month-day)	No
Purchase date	Date (year-month-day)	No
End of warranty	Date (year-month-day)	No
Description	Multiline character string	No

Tabs

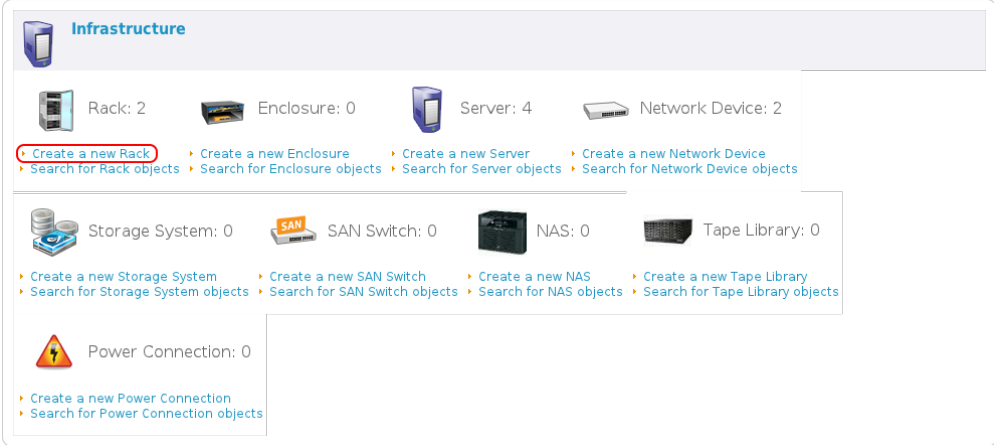
Tab	Description
Contacts	All the contracts for this configuration item
Documents	All the documents linked to this configuration item
Tickets	All the tickets for this configuration item
Enclosures	All the enclosures in this rack
Devices	All the physical devices racked into this rack
Provider contracts	All the provider contracts for this configuration item

Creating a new Rack

Click on the “Overview” menu:



And click on “Create a new Rack” in the dashboard:



To display the following form:

Relations

- Impacts: an Rack is considered as impacting the Application Solutions that this Rack is part of and the contacts (Persons, Teams) directly linked to the Rack.
- Depends on: a Rack has no dependencies.

Service Management (services, SLAs, contracts) Module

IT Service Management (ITSM) is a process-based practice intended to align the delivery of IT services with needs of the enterprise. Part of this, is the management of the service catalog that defines *services*, *SLA* and *contracts* with the end users (or customers).

This module allows a service manager to define all the pieces of the service catalog:

- Service
- Service subcategories
- SLA & SLT
- Customer contracts
- Provider contracts

The *service management* is integrated with the *ticket management* system:


- When creating a ticket for a given customer, the agent can select the service amongst the list of services defined for this customer.
- Ticket deadlines are computed depending on the SLA signed with the customer.

There is two alternatives to manage the service catalog in iTop:

- Service Management (services, SLAs, contracts)
- Service Management (services, SLAs, contracts) for Service providers

The first one is used to manage service within a single company, whereas the second is desgined for service providers. Both modules provides the same elements to be managed, the differences are the relationships between those elements. In the sections below we describe those differences.

Contract Type

No description for this class. 

Contract Type Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes

Customer Contract



A customer contract allows you to define which services have been purchased (requested) by a customer and what are the SLA corresponding to those services. By default, no coverage window is defined in iTop.

It is possible to document several contracts for a given customer. For each customer contracts you can link documents, and contacts related to it.

Customer Contract Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Customer	Foreign key to a(n) Organization	Yes
Description	Multiline character string	No
Start date	Date (year-month-day)	No
End date	Date (year-month-day)	No
Cost	Alphanumeric string	No
Cost Currency	Possible values: Dollars, Euros	No
Billing frequency	Alphanumeric string	No
Cost unit	Alphanumeric string	No
Provider	Foreign key to a(n) Organization	Yes
Status	Possible values: implementation, obsolete, production	No
Contract type	Foreign key to a(n) Contract Type	No

Tabs

Tab	Description
Contacts	All the contacts for this customer contract
Documents	All the documents for this customer contract
Services	All the services purchased for this contract

If you have installed the **Service Management for Providers** module, there are 2 additional tabs:

Tab	Description
Provider contracts	All the provider contracts to support this service
Depends on CIs	All the configuration items that are used to provide this service

Creating a Customer Contract

The menu “Customer contract” provides a list of already defined customer contracts. Just click on the button “New” to create a new one.

«image contrat service sla»

Delivery Model



A *delivery model* defines which teams are providing support and services to a set of organizations (customers). It can be used also to document key people with their role: * Service Manager * Chief technology officer * Helpdesk manager

Several customers can share the same *delivery model*. Nevertheless, it may be useful to define several delivery models, especially if you want to limit the number of teams to which you can assign a ticket.

The *delivery model* of a given customer is used to identify to which team you can assign a ticket for this one.

If no delivery model is defined for a given customer, then you will not be able to create tickets for that customer.

Delivery Model Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Description	Multiline character string	No

Tabs

Tab	Description
Contacts	All the contacts (Teams and Person) for this delivery model
Customers	All the customers having this delivering model

Creating a Delivery Model

The menu “Delivery models” provides a list of already defined *delivery models*. Just click on the button “New” to create a new one.

Provider Contract



A provider contract allows you to document all the contracts you have with your providers (Support, maintenance, hardware contracts, etc.) This helps you to retrieve quickly such information and better manage the contract renewal process.

You can also link *configuration items* that are covered by a provider contract. For each customer contracts you can link documents, and contacts related to it.

Provider Contract Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Customer	Foreign key to a(n) Organization	Yes
Description	Multiline character string	No
Start date	Date (year-month-day)	No
End date	Date (year-month-day)	No
Contract type	Foreign key to a(n) Contract Type	No
Cost	Alphanumeric string	No
Cost Currency	Possible values: Dollars, Euros	No
Billing frequency	Alphanumeric string	No
Cost unit	Alphanumeric string	No
Provider	Foreign key to a(n) Organization	Yes
SLA	Alphanumeric string	No
Service hours	Alphanumeric string	No
Status	Possible values: implementation, obsolete, production	No

Tabs

Tab	Description
Contacts	All the contacts for this customer contract
Documents	All the documents for this customer contract
CIs	All the configuration items covered by this provider contract

Creating a Provider Contract

The menu “Provider contract” provides a list of already defined provider contracts. Just click on the button “New” to create a new one.

SLA



A *service level agreement* (SLA) is a group of SLT. It defines the agreement between a provider and a customer for a given set of services.

Each IT department can define its own list of SLAs.

SLA Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Provider	Foreign key to a(n) Organization	Yes
description	Multiline character string	No

Tabs

Tab	Description
SLTs	All the service level targets for this SLA
Customer contracts	All the customer contracts using this SLA

Creating a SLA

The menu “SLA” provides a list of already defined service level agreements. Just click on the button “New” to create a new one.

SLT



A *service level target* (SLT) allows you to define metrics for agreements that have to be respected. By default, iTop is proposed with two types of metrics:

- *Time to own* (TTO): This is time between the creation of a ticket and the time to take it into account (assign it to an agent)
- *Time to resolve* (TTR): This is the time between the creation of a ticket and the time to resolve it

A SLT is defined by:

- a name
- the type of metric
- the type of request
- the priority of the request

SLT Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Priority	Possible values: critical, high, medium, low	No
Request type	Possible values: incident, service request	No
Metric	Possible values: TTO, TTR	No
Value	Numeric value (could be negative)	No
Unit	Possible values: hours, minutes	No

Creating a SLT

The menu “SLT” provides a list of already defined *service level targets*. Just click on the button “New” to create a new one.

Service



The services are the basis of the *service catalog*. They are used to document all the services that can be provided by one or several IT Departments. For example:

- Application management
- Desktop and End user management
- Network management
- System management

Each IT provider can define its own list of services. Services are used to characterize a user request or an incident.

Services can be grouped into *service families*.

For each service you can document:

- the configuration items required to deliver the service
- the provider contracts, on which the service is depending

Service Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Provider	Foreign key to a(n) Organization	Yes
Service Family	Foreign key to a(n) Service Family	No
Description	Multiline character string	No
Status	Possible values: implementation, obsolete, production	No

Tabs

Tab	Description
Service sub categories	All the sub categories for this service
Documents	All the documents linked to the service
Contacts	All the contacts for this service
Customer contracts	All the customer contracts that have purchased this service
Provider contracts	All the provider contracts to support this service
Depends on CIs	All the configuration items that are used to provide this service


If you have installed the **Service Management for Providers** module, then the tabs "*Provider contracts*" and "*Depends on CIs*" are available on [Customer Contracts](#)

Creating a Service

The menu "Service" provides a list of services. Just click on the button "New" to create a new one.

Service Family



No description for this class. 

Service Family Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes

Tabs

Tab	Description
Services	All the services in this category

Service Subcategory



The *service subcategories* are used to define more precisely a service. For example you can define the following subcategory for the service System management:

- Troubleshooting
- Order a new server
- Configure a new virtual machine
- Repair a server

A *service subcategory* is related to a type of user request (Incident or Service request). This is done to automate the qualification of a user request or an incident.

Service Subcategory Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Service	Foreign key to a(n) Service	Yes
Provider	Field mapped to an external key	Yes
Status	Possible values: implementation, obsolete, production	No
Request type	Possible values: incident, service request	Yes
Provider Name	Field mapped to an external key	Yes
Description	Multiline character string	No

Creating a Service Subcategory

The menu “Service subcategories” provides a list of service subcategories. Just click on the button “New” to create a new one.

User request management (Service Desk) Module

There are two alternatives for managing user requests in iTop. You can choose to install one of the two following modules:

- **Simple Ticket Management**
- **User Request Management ITIL V3**

The **Simple Ticket Management** module provides a simplified ticketing system. It is used to keep track of end-users requests. There are two types of request:

- **Incidents** are used to track unexpected issues that have an impact on the delivered services.
- **Service requests** are used to request new services or features like installing a new PC, creating a new email address.

This module manages both types of requests in a single type of ticket. *Incidents* and *service requests* will follow the same workflow. This allows agent to easily manage any kind of ticket and reclassify a request without having to create a new one.

The **User Request ITIL V3** module focuses on *service requests*.

In case you choose to install this module, and if you need to manage incidents as well, then you have to install the **Incident Management** module.

Whatever module you choose, a *user request* can be created via the customer portal or directly in iTop. The support agent can then modify and communicate with the customer via a journal called “Public log.” He can also communicate with internal teams within his company through a journal called “Private log”.

A customer user will see only the public log. The private log cannot be viewed from the portal.

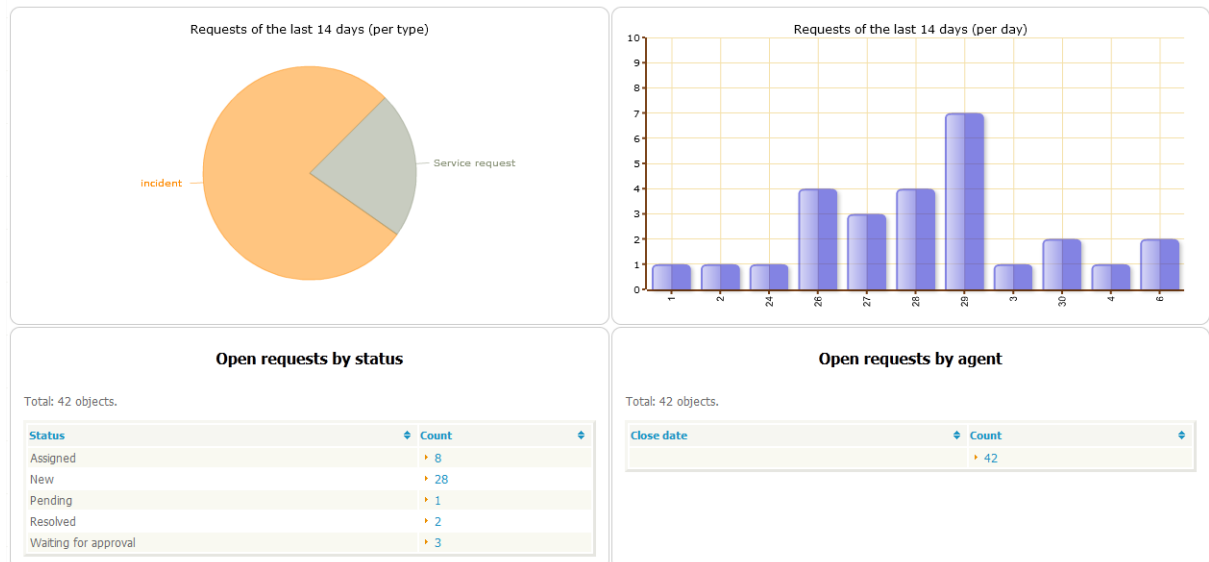
A user request is controlled by a workflow in order to make sure it is managed according to a defined process. Only authorized users can manage a user request and change its status.

A user request can be linked to a parent problem, or a parent change. In case you have installed the User Request ITIL V3 module, your request can be linked to a parent incident.

It is also possible to regroup user requests under a single user request.

The overview dashboard allows agents and managers to monitor the helpdesk activity.

Dashboard for Request Management



User Request



User request are used to document all the request submitted by users

User Request Properties

Name	Type	Mandatory?
Organization	Foreign key to a(n) Organization	Yes
Caller	Foreign key to a(n) Person	Yes
Status	Possible values: Approved, Assigned, Closed, Escalated TTO, Escalated TTR, New, Pending, Rejected, Resolved, Waiting for approval	Yes
Origin	Possible values: mail, monitoring, phone, portal	No
Title	Alphanumeric string	Yes
Description	Multiline character string	Yes
Service	Foreign key to a(n) Service	No
Service subcategory	Foreign key to a(n) Service Subcategory	No
Hot Flag	Possible values: No, Yes	No
Hot reason	Alphanumeric string	No
Pending reason	Multiline character string	No
Request Type	Possible values: Incident, Service request	No
Impact	Possible values: A department, A service, A person	Yes
Urgency	Possible values: critical, high, medium, low	Yes
Priority	Possible values: critical, high, medium, low	Yes
Team	Foreign key to a(n) Team	No
Agent	Foreign key to a(n) Person	No
Approver	Foreign key to a(n) Person	No
Start date	Date and time (year-month-day hh:mm:ss)	No
Last update	Date and time (year-month-day hh:mm:ss)	No
Assignment date	Date and time (year-month-day hh:mm:ss)	No
TTO Deadline	Core:AttributeStopWatch+ (100_deadline)	No
TTR Deadline	Core:AttributeStopWatch+ (100_deadline)	No
Last pending date	Date and time (year-month-day hh:mm:ss)	No

Resolution date	Date and time (year-month-day hh:mm:ss)	No
Close date	Date and time (year-month-day hh:mm:ss)	No
Parent request	Foreign key to a(n) User Request	No
Parent problem	Foreign key to a(n) Problem	No
Parent change	Foreign key to a(n) Change	No
Resolution code	Possible values: assistance, bug fixed, hardware repair, other, software patch, system update, training	No
Solution	Multiline character string	No
Resolution delay	Core:AttributeDuration+	No
User satisfaction	Possible values: Very satisfied, Fairly satisfied, Rather Dissatisfied, Very Dissatisfied	No
User comment	Multiline character string	No
SLA tto passed	Core:AttributeStopWatch+ (100_passed)	No
SLA tto over	Core:AttributeStopWatch+ (100_overrun)	No
SLA ttr passed	Core:AttributeStopWatch+ (100_passed)	No
SLA ttr over	Core:AttributeStopWatch+ (100_overrun)	No

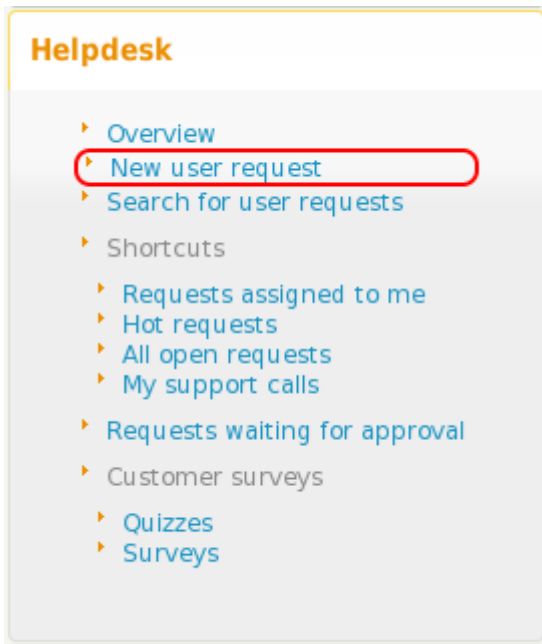
If you have installed the **User Request ITIL V3** module the attribute **Request Type** will be set to *"service request"* and it cannot be modified

Tabs

Tab	Description
CIs	All the configuration items impacted for this ticket
Contacts	All the contacts linked to this ticket
Child Requests	All the requests that are linked to this parent request
Work orders	All the work orders for this ticket

Creating a User Request

Click on the "New user request" menu:



The following form is displayed:

Cancel Create Assign Wait for approval

Properties Cls Contacts Child Requests Work orders Attachments

General Information

Organization -- select one -- + !

Caller -- select one -- + !

Status New

Origin phone

Title !

Description !

Qualification

Request Type Incident

Impact A department

Urgency low

Priority low

Relations

Parent request -- select one -- +

Parent problem -- select one -- +

Parent change -- select one -- +

Contacts

Dates

Start date

Last update

TTO Deadline

Resolution

SLA report

More Information

Service -- select one -- +

Service subcategory -- select one -- +

Private log

Type your text here:

Public log

Type your text here:

Managing Public & Private Log

The public and the private log are used to keep track of all communications and activities related to a user request.

The **public log** is aimed at exchanging information with the requestor.

The **private log** is the preferred way for keeping track of the investigations or operations: copy/paste of command line results, summary of communications with a provider, etc.



Each entry in the public or private log is tracked with the name of the user who updated it and when it was done. It cannot be modified nor deleted.

The public log is visible from the customer portal.

Managing impacted CIs and Contacts

When a user request is created, the agent can specify which configuration items (CIs) are related to this request via the tab “CIs”. The impact analysis engine automatically adds to this list all the other CIs that are potentially impacted by the selected items. It also adds all the contacts that are potentially impacted.

The impact rules of each CIs are described in the [Configuration management module](#).

This automated impact analysis is made only the user request is being recorded for the first time. Later on, the agent can add or remove items from the list of impacted CIs: iTop will not rework the list on ticket updates.

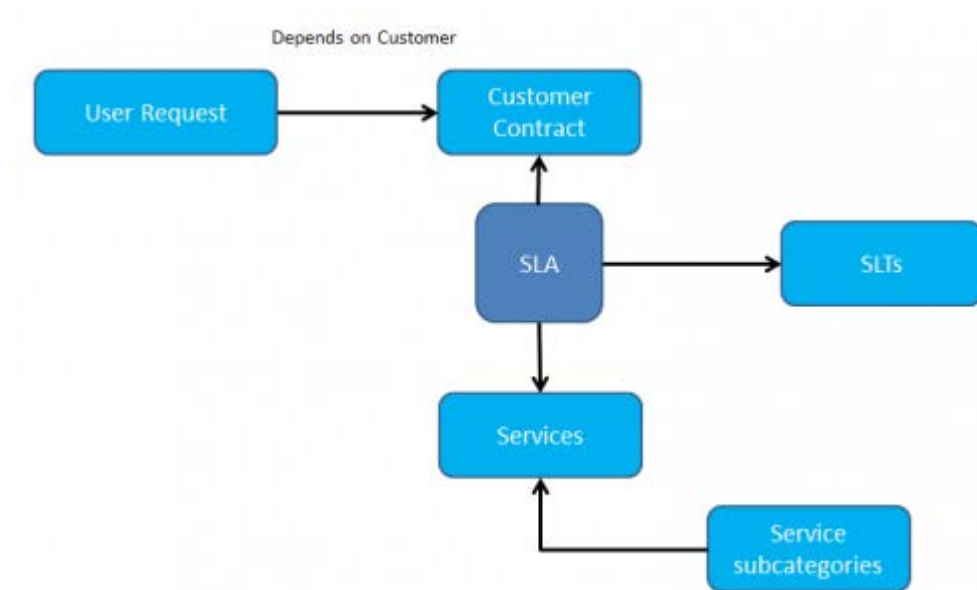
Dependencies with the service catalog

The Helpdesk module is linked to the service catalog in order to:

- define which service and service subcategories can be selected for a given customer
- define to which team a user request can be assigned
- compute time to own (TTO) and time to resolve (TTR) deadlines

The list of services displays only the service that have been purchased by the selected customer via a *customer contract*. The list of *service subcategories* displays only the sub categories corresponding to the selected service and the selected request type.

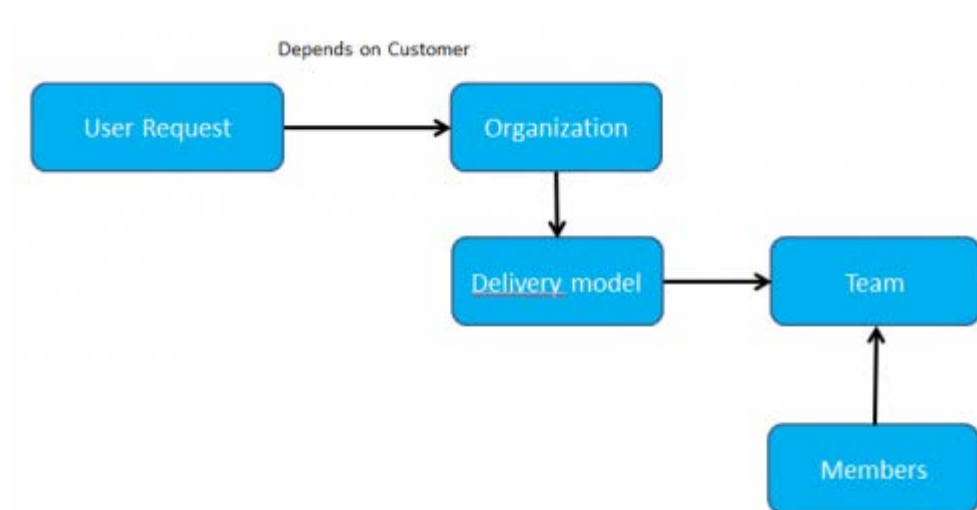
The following picture describes the relationships between the service catalog elements and user requests.



Assigning a user request to a team and agent

The list of teams to which you can assign a user request is defined by the *delivery model* of the corresponding customer. When creating a user request, the agent has to select the customer organization, then the list of teams is strictly limited to the teams defined for this customer. If a team is missing, the delivery model of the customer must be updated to reflect this need. See [More about Delivery model](#) for more information

The following picture describes the relationships between the delivery model and user requests.



Automated priority computation

The priority is computed automatically. This computation depends on the impact and the urgency of the user request. The following matrix describes how the priority is computed:

		Impact		
		A departement	A service	A person
Urgency	critical	critical	critical	high
	high	critical	high	medium
	medium	high	medium	low
	low	medium	medium	low

Deadline computation

To meet service agreements with customers, iTop automatically computes time to own (TTO) and time to resolve (TTR) deadlines. These deadlines depend on the *service level agreements* defined in the customer contracts. In the basic version of iTop there is no coverage window. The calculations assume a 24*7 service coverage.

The measured TTO is the time cumulated while the user request is not assigned. When the TTO deadline is passed, the ticket status is automatically changed to “Escalated TTO”.

The measured TTR is the time cumulated while the user request is neither pending nor resolved. When the TTR deadline is passed, the ticket status is automatically changed to “Escalated TTR”.

The computation of the deadlines depends on:

- The *service level agreement* defined in the customer contract for the selected service
- The *priority* of the user request
- The *type* of request

These are defined in the service level targets (SLT) corresponding to the service level agreement (SLA).

The deadlines computation is performed each time a modification is made on the user request.

When the cumulated TTO/TTR reaches 75% of the TTO/TTR deadline, then the user request is displayed in yellow. Once the deadline is passed, it becomes red.

Once the user request is resolved, deadlines and measures are kept within the user request. This can be used both for analyzing process issues and for reporting purposes.

The following information are recorded:

- TTO deadline (date and time)
- TTO cumulated (seconds)
- TTO passed (yes / no)
- TTO overrun (seconds)
- TTR deadline (date and time)
- TTR cumulated (seconds)
- TTR passed (yes / no)
- TTR overrun (seconds)

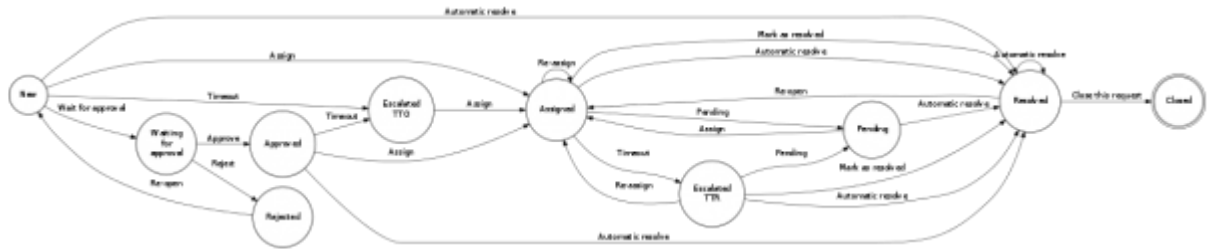
Regrouping User Request

It is sometimes useful to regroup user requests under an incident which is the root cause of the issue. For instance when a mail server is down, you may have several end users complaining about mailbox being unavailable.

To group user requests, use the field **parent incident**.

If an incident ticket is parent of a user request, then each time its private and public logs are modified, iTop will automatically update the logs of the child requests. When the parent incident get resolved, iTop will automatically mark the child requests as “resolved” .

User Request Life Cycle



Waiting

	New	Assigned	Escalated TTR	for approval	Resolved	Pending	Escalated TTR	Close	Approved	Rejected
Organization	M	M	M	M	R/O	M	M	R/O	M	M
Caller	M		M	M	R/O			R/O	M	M
Status	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Origin					R/O			R/O		
Title					R/O			R/O		
Description					R/O			R/O		
Service					M			R/O		
Service subcategory								R/O		
Hot Flag	H		H	H	R/O			R/O	H	H
Hot reason	H		H	H	R/O			R/O	H	H
Pending reason	H	H	H	H	R/O	M	H	R/O	H	H
Request Type		M			R/O	M	M	R/O		
Impact					R/O			R/O		
Urgency					R/O			R/O		
Priority	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Team	H	M			R/O	M	M	R/O		
Agent	H	M	H	H	R/O	M	M	R/O	H	H
Approver	H	R/O	H		R/O	R/O	R/O	R/O	R/O	H
Start date	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Last update	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Assignment	H	R/O	H	H	R/O	R/O	R/O	R/O	H	H

date											
TTO											
Deadline	R/O	H	R/O	R/O	H	H	H	H	R/O	H	
TTR											
Deadline	H	R/O	H	H	H	H	R/O	H	H	H	
Last											
pending	H	H	H	H	H	R/O	H	H	H	H	
date											
Resolution											
date	H	H	H	H	R/O	H	H	R/O	H	H	
Close date	H	H	H	H	H	H	H	R/O	H	H	
Parent											
request					R/O			R/O			
Parent											
problem					R/O			R/O			
Parent											
change					R/O			R/O			
Resolution											
code	H	H	H	H	M	H	H	R/O	H	H	
Solution	H	H	H	H	M	H	H	R/O	H	H	
Resolution											
delay	H	H	H	H	R/O	H	H	R/O	H	H	
User											
satisfaction	H	H	H	H	H	H	H		H	H	
User											
comment	H	H	H	H	H	H	H		H	H	
SLA											
passed	tto	H	R/O	H	H	R/O	R/O	R/O	R/O	H	H
SLA											
over	tto	H	R/O	H	H	R/O	R/O	R/O	R/O	H	H
SLA											
passed	ttr	H	H	H	H	R/O	H	H	R/O	H	H
SLA											
ttr over		H	H	H	H	R/O	H	H	R/O	H	H

Table key:

- H: hidden
- R/O: read-only
- M: mandatory

Incident Management ITIL V3 Module

Incident



An *incident ticket* or simply an ” *incident*” keeps tracks of a technical issue within the IT:

- System down
- Network issue
- Application failure

An *incident* can be linked to a *problem* (ticket). For instance, when the same *incident* is occurring often and you would like to investigate the root cause of the *problem*. An *incident* can be linked to a *change* (ticket), if it requires the implementation of a modification. For instance, when installing a patch.

Incident tickets are managed by people having the profile **Support agent**.

Incident Properties

Name	Type	Mandatory?
Organization	Foreign key to a(n) Organization	Yes
Caller	Foreign key to a(n) Person	Yes
Status	Possible values: Assigned, Closed, Escalated TTO, Escalated TTR, New, Pending, Resolved	Yes
Origin	Possible values: mail, monitoring, phone, portal	No
Title	Alphanumeric string	Yes
Description	Multiline character string	Yes
Service	Foreign key to a(n) Service	No
Service subcategory	Foreign key to a(n) Service Subcategory	No
Hot Flag	Possible values: No, Yes	No
Hot reason	Alphanumeric string	No
Pending reason	Multiline character string	No
Impact	Possible values: A department, A service, A person	Yes
Urgency	Possible values: critical, high, medium, low	Yes

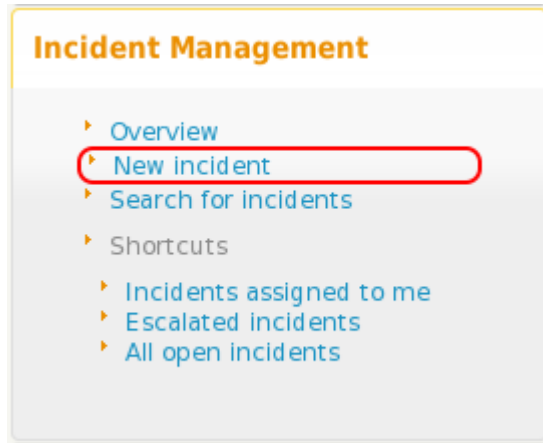
Priority	Possible values: critical, high, medium, low	Yes
Team	Foreign key to a(n) Team	No
Agent	Foreign key to a(n) Person	No
Start date	Date and time (year-month-day hh:mm:ss)	No
Last update	Date and time (year-month-day hh:mm:ss)	No
Assignment date	Date and time (year-month-day hh:mm:ss)	No
TTO Deadline	Core:AttributeStopWatch+ (100_deadline)	No
TTR Deadline	Core:AttributeStopWatch+ (100_deadline)	No
Last pending date	Date and time (year-month-day hh:mm:ss)	No
Resolution date	Date and time (year-month-day hh:mm:ss)	No
Close date	Date and time (year-month-day hh:mm:ss)	No
Parent incident	Foreign key to a(n) Incident	No
parent problem id	Foreign key to a(n) Problem	No
Parent change	Foreign key to a(n) Change	No
Resolution code	Possible values: assistance, bug fixed, hardware repair, other, software patch, system update, training	No
Solution	Multiline character string	No
Resolution delay	Core:AttributeDuration+	No
User satisfaction	Possible values: Very satisfied, Fairly satisfied, Rather Dissatisfied, Very Dissatisfied	No
User comment	Multiline character string	No
SLA tto passed	Core:AttributeStopWatch+ (100_passed)	No
SLA tto over	Core:AttributeStopWatch+ (100_overrun)	No
SLA ttr passed	Core:AttributeStopWatch+ (100_passed)	No
SLA ttr over	Core:AttributeStopWatch+ (100_overrun)	No

Tabs

Tab	Description
Cls	All the configuration items impacted for this ticket
Contacts	All the contacts linked to this ticket
Child incidents	All the child incidents related to this incident
related request list	
Work orders	All the work orders for this ticket

Creating a Incident

Click on the “New incident” menu:



The following form is displayed:

Cancel Create Assign

Properties CIs Contacts Child incidents related request list Work orders Attachments

General Information

Organization -- select one -- + !

Caller -- select one -- + !

Status New

Origin phone

Title !

Description

Qualification

Impact A department

Urgency low

Priority low

Contacts

Dates

Start date

Last update

TTO Deadline

Relations

Parent incident -- select one -- +

parent problem id -- select one -- +

Parent change -- select one --

Resolution

SLA report

More Information

Service -- select one -- +

Service subcategory -- select one -- +

Private log

Type your text here:

Public log

Type your text here:

Managing Public & Private Log

Please refer to [User requests management](#)

Managing impacted CIs and Contacts

Please refer to [User requests management](#)

Dependencies with service catalog

Please refer to [User requests management](#)

Assigning a user request to a team and agent

Please refer to [User requests management](#)

Automated priority computation

Please refer to [User requests management](#)

Deadline computation

Please refer to [User requests management](#)

Grouping related incidents

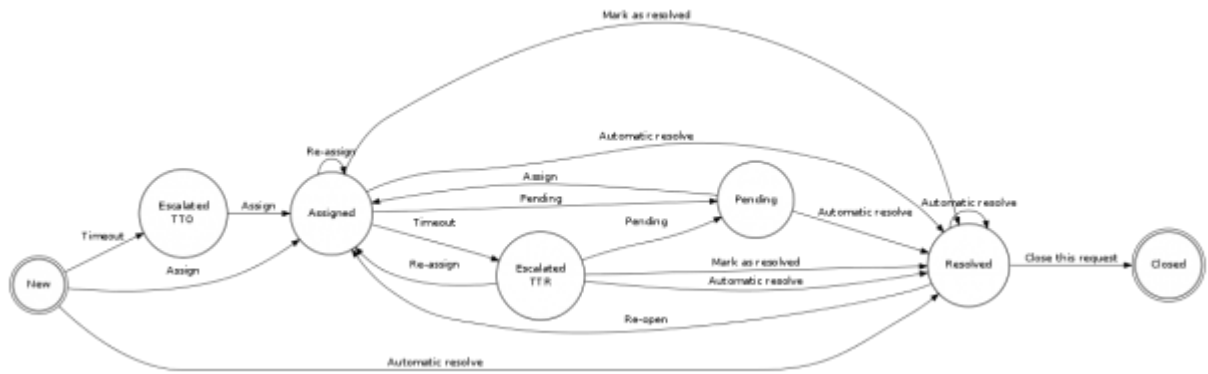
It is sometimes useful to regroup incident tickets under an incident which is the root cause of the issue. For instance when a network device is down, you may have several servers reported as “not responding”.

To group tickets, use the field **parent incident**.

When an incident is parent of another ticket, each time its private and public logs are modified, iTop will automatically update the logs of the child tickets. When the parent incident get resolved, iTop will automatically resolve the child incidents.

Incident Life Cycle

Incident objects have the following life cycle:



Depending on the status of the object, the constraints on the properties vary as shown on the table below:

	New	Assigned	Escalated TTO	Resolved	Pending	Escalated TTR	Closed
Organization	M	M	M	R/O	M	M	R/O
Caller	M		M	R/O			R/O
Status	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Origin				R/O			R/O
Title				R/O			R/O
Description				R/O			R/O
Service				M			R/O
Service subcategory							R/O
Hot Flag	H		H	R/O			R/O
Hot reason	H		H	R/O			R/O
Pending reason	H	H	H	R/O	M	H	R/O
Impact				R/O			R/O
Urgency				R/O			R/O
Priority	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Team	H	M		R/O	M	M	R/O
Agent	H	M	H	R/O	M	M	R/O
Start date	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Last update	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Assignment date	H	R/O	H	R/O	R/O	R/O	R/O
TTO Deadline	R/O	H	R/O	H	H	H	H
TTR Deadline	H	R/O	H	H	H	R/O	H
Last pending date	H	H	H	H	R/O	H	H
Resolution date	H	H	H	R/O	H	H	R/O
Close date	H	H	H	H	H	H	R/O
Parent incident				R/O			R/O

parent problem id				R/O			R/O
Parent change				R/O			R/O
Resolution code	H	H	H	M	H	H	R/O
Solution	H	H	H	M	H	H	R/O
Resolution delay	H	H	H	R/O	H	H	R/O
User satisfaction	H	H	H	H	H	H	
User comment	H	H	H	H	H	H	
SLA tto passed	H	R/O	H	R/O	H	R/O	R/O
SLA tto over	H	R/O	H	R/O	H	R/O	R/O
SLA ttr passed	H	H	H	R/O	H	H	R/O
SLA ttr over	H	H	H	R/O	H	H	R/O

Table key:

- H: hidden
- R/O: read-only
- M: mandatory

Change Management Module

Change



A *change ticket* or simply a *change* keeps track of modifications planned in the IT:

- Patch installations
- System configuration changes
- OS updates
- Software installations

This way you can track all the modifications made in your IT. A lot of incidents are due to changes made in the IT environment. By documenting them, you can identify easily what changes had been made when an incident occurs and restore the service more quickly.

Moreover, this change management module allows you to analyze automatically the impact of the changes on the infrastructure and the application solutions. IT engineers can then better control the unavailability of the critical services in the enterprise, and improve customer satisfaction.

Change tickets are managed by the people having the profiles:

- **Change implementors** plan and implement the changes
- **Change supervisor** follow up with the changes
- **Change manager** approve the changes

When installing iTop, you have the choice between two different modules for documenting changes. The module described here has been designed as a simple workflow to ease the management of changes.

Change Properties

Name	Type	Mandatory?
Ref	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: Approved, Assigned, Closed, New, Planned, Rejected	No
Title	Alphanumeric string	Yes
Description	Multiline character string	Yes
Caller	Foreign key to a(n) Person	Yes
Team	Foreign key to a(n) Team	No
Agent	Foreign key to a(n) Person	No
Change manager	Foreign key to a(n) Person	No
Category	Possible values: application, hardware, network, other, software, system	No
Reject reason	Multiline character string	No
Fallback plan	Multiline character string	No
Parent change	Foreign key to a(n) Change	No
Creation date	Date and time (year-month-day hh:mm:ss)	No
Start date	Date and time (year-month-day hh:mm:ss)	No
End date	Date and time (year-month-day hh:mm:ss)	No
Last update	Date and time (year-month-day hh:mm:ss)	No
Approval date	Date and time (year-month-day hh:mm:ss)	No
Close date	Date and time (year-month-day hh:mm:ss)	No

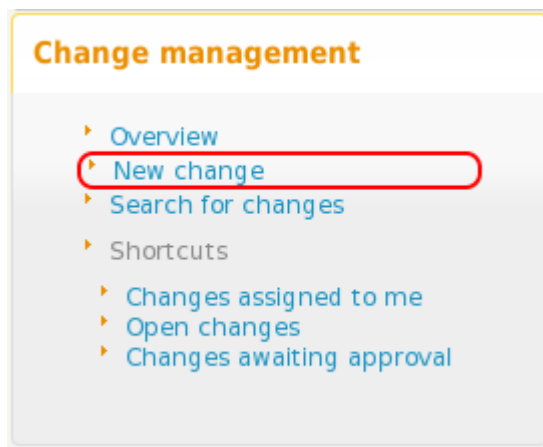
Tabs

Tab	Description
-----	-------------

CIs	All the configuration items impacted for this ticket
Contacts	All the contacts linked to this ticket
Work orders	All the work orders for this ticket
Related requests	All the user requests linked to this change
Related problems	All the problems linked to this change
Child changes	All the sub changes linked to this change

Creating a Change

Click on the “New change” menu:



The following form is displayed:

The screenshot shows a web-based form for creating or editing a user request. At the top, there are buttons for 'Cancel', 'Create', and 'Assign'. Below these are several tabs: 'Properties', 'Cls', 'Contacts', 'Work orders', 'Related requests', 'Related problems', 'Child changes', and 'Attachments'. The 'Properties' tab is active, showing several sections:

- General Information:** Includes fields for 'Ref', 'Organization' (a dropdown menu with '-- select one --'), 'Status' (set to 'New'), 'Title', and a large 'Description' text area. There are small icons for adding, deleting, and warning in the Organization and Title fields.
- Resolution:** Includes a 'Category' dropdown menu (set to 'hardware') and a 'Fallback plan' text area.
- Dates:** Includes fields for 'Creation date', 'Start date', 'End date', and 'Last update', each with a small calendar icon.
- Contacts:** Includes a 'Caller' dropdown menu with '-- select one --' and warning icons.
- Relations:** Includes a 'Parent change' dropdown menu with '-- select one --' and an add icon.
- Private log:** A large text area with the placeholder text 'Type your text here:'.

At the bottom of the form, there are buttons for 'Cancel', 'Create', and 'Assign'.

Assigning a user request to a team and agent

The list of teams to which you can assign a change is defined by the delivery model of the corresponding organization. When creating a change, the agent has to select the customer organization, then the list of teams is strictly limited to the teams defined for this customer. If a team is missing, the delivery model of the customer must be updated to reflect this need. See [More about Delivery model](#) for more information

Managing Private Log

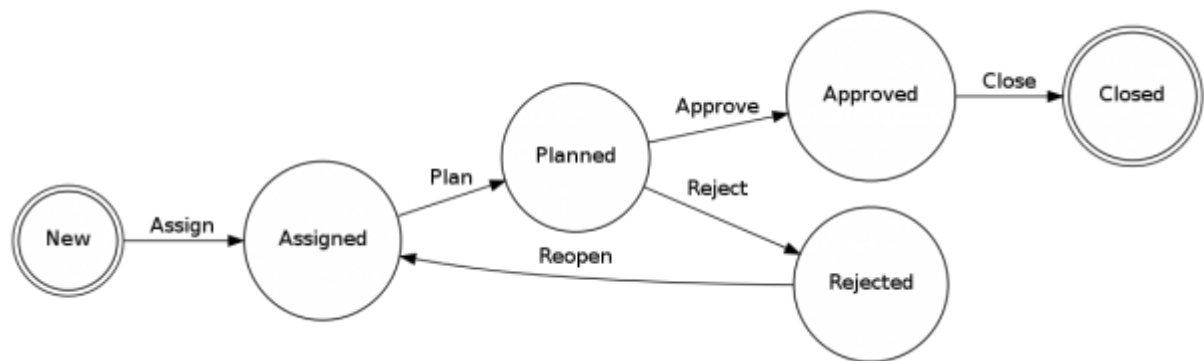
A change ticket only have a private log to document all the activities and communications related to it. This one is not visible on the end user portal.

Managing impacted CIs and Contacts

This section is similar to the one of the Helpdesk module. Please refer to it

Change Life Cycle

Change objects have the following life cycle:



Depending on the status of the object, the constraints on the properties vary as shown on the table below:

	New	Assigned	Planned	Rejected	Approved	Closed
Ref	R/O	R/O	R/O	R/O	R/O	R/O
Organization	M	M	M	R/O	R/O	R/O
Status	R/O	R/O	R/O	R/O	R/O	R/O
Title	M	M	M	R/O	R/O	R/O
Description	M	M	M	R/O	R/O	R/O
Caller	M		M	R/O	R/O	R/O
Team	H	M	M	R/O	R/O	R/O
Agent	H	M	M	R/O	R/O	R/O
Change manager	H	M	M	R/O	R/O	R/O
Category				R/O		R/O
Reject reason	H	H	H	M	R/O	R/O
Fallback plan			M	R/O		R/O
Parent change				R/O		R/O
Creation date	R/O	R/O	R/O	R/O	H	R/O
Start date			M	R/O	R/O	R/O
End date			M	R/O	R/O	R/O

Last update	R/O	R/O	R/O	R/O	R/O	R/O
Approval date	H	H	H	R/O	R/O	R/O
Close date	H	H	H	H	H	R/O

Table key:

- H: hidden
- R/O: read-only
- M: mandatory

Change Management ITIL Module

A change is used to document all the modifications that are planned in the IT:

- Patch installations
- System configuration changes
- OS updates
- Software installations

This way you can track all the modifications made within your IT. A lot of incidents are due to changes made to the IT environment. By documenting them, you can identify easily what changes had been made when an incident occurs and restore the service more quickly.

Moreover, this change management module allows you to analyze automatically the impact of the changes on the infrastructure and the application solutions. IT engineers can then better control the unavailability of the critical services in the enterprise, and improve customer satisfaction.

The changes are managed by the people having the following profiles:

- **Change implementors** plan and implement the changes
- **Change supervisors** follow up with the changes
- **Change managers** approve the changes

When installing iTop, you have the choice between two different modules for documenting changes. The module described here has been designed to implement ITIL V3 change management with three types of changes:

- **Routine changes**
- **Normal changes**
- **Emergency changes**

The differences between those three types of changes rely in their respective workflows.

Emergency Changes



An ITIL emergency change is the highest priority change that can be defined in an organization. Emergency changes are defined as changes that need to be evaluated, assessed and either rejected or approved in a short timeframe. Simply defining a change as an emergency does not automatically entail the change should be implemented. The Emergency Change Advisory Board (ECAB) will assess the change and provide advice to the delegated person responsible for approving or rejecting emergency changes.

Emergency Change Properties

Name	Type	Mandatory?
Ref	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: Approved, Assigned, Closed, Implemented, Monitored, New, Not approved, Planned and scheduled, Rejected, No Validated	
Title	Alphanumeric string	Yes
Description	Multiline character string	Yes
Approval comment	Alphanumeric string	No
Caller	Foreign key to a(n) Person	No
Team	Foreign key to a(n) Team	No
Agent	Foreign key to a(n) Person	No
Supervisor team	Foreign key to a(n) Team	No
Supervisor	Foreign key to a(n) Person	No
Manager team	Foreign key to a(n) Team	No
Manager	Foreign key to a(n) Person	No
Reject reason	Alphanumeric string	No
Impact	Alphanumeric string	No
Outage	Possible values: No, Yes	Yes

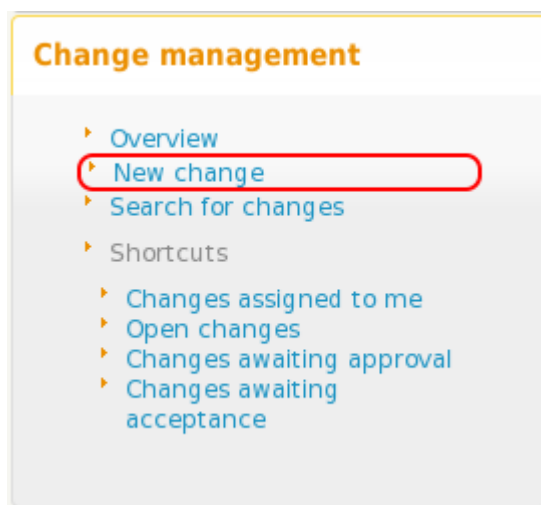
Fallback plan	Multiline character string	No
Parent change	Foreign key to a(n) Change	No
Creation date	Date and time (year-month-day hh:mm:ss)	No
Start date	Date and time (year-month-day hh:mm:ss)	No
End date	Date and time (year-month-day hh:mm:ss)	No
Last update	Date and time (year-month-day hh:mm:ss)	No
Approval Date	Date and time (year-month-day hh:mm:ss)	No
Close date	Date and time (year-month-day hh:mm:ss)	No

Tabs

Tab	Description
CIs	All the configuration items impacted for this ticket
Contacts	All the contacts linked to this ticket
Work orders	All the work orders for this ticket
Related requests	All the user requests linked to this change
Related incidents	All the incidents linked to this change
Related problems	All the problems linked to this change
Child changes	All the sub changes linked to this change

Creating a Emergency Change

Click on the “New change” menu:



Then select “Emergency Change” in the form below:

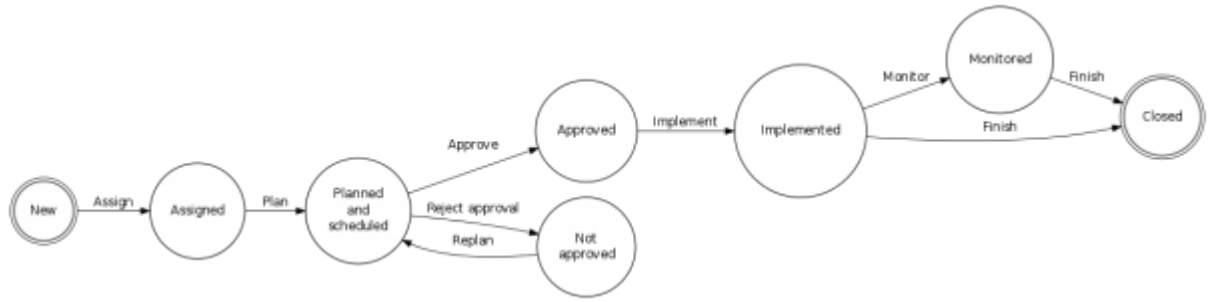
Select the type of Change to create:

And click “Apply” to display the Emergency Change creation form:

The screenshot shows a web-based form for creating an Emergency Change. At the top, there are buttons for 'Cancel', 'Create', and 'Assign'. Below these are several tabs: 'Properties', 'CIs', 'Contacts', 'Work orders', 'Related requests', 'Related incidents', 'Related problems', and 'Child changes'. The 'Properties' tab is active, showing a 'General Information' section with fields for 'Ref', 'Organization' (a dropdown menu), 'Status' (set to 'New'), 'Title', and 'Description' (a large text area). To the right, there are sections for 'Resolution', 'Relations' (with a 'Parent change' dropdown), and 'Dates' (with 'Creation date' and 'Last update' labels). Below the 'General Information' section is a 'Contacts' section with a 'Caller' dropdown menu. At the bottom, there is a 'Private log' section with a text input field labeled 'Type your text here:'. The form also includes 'Cancel', 'Create', and 'Assign' buttons at the bottom.

Emergency Change Life Cycle

Emergency Change objects have the following life cycle:



Depending on the status of the object, the constraints on the properties vary as shown on the table below:

	New	Assigned	Planned and scheduled	Approved	Not approved	Implemented	Monitored	Closed
Ref	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Organization			R/O	R/O	R/O	R/O	R/O	R/O
Status	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Title	M	M	M	M	M	R/O	R/O	R/O
Description		R/O	R/O	R/O	R/O	R/O	R/O	R/O
Approval comment	H	H	H	M	H	R/O	R/O	R/O
Caller							R/O	R/O
Team	H	M	M	M	M	M	R/O	R/O
Agent	H	M	M	M	M	M	R/O	R/O
Supervisor team	H	M	M	R/O	R/O	R/O	R/O	R/O
Supervisor	H	M	M	R/O	R/O	R/O	R/O	R/O
Manager team	H	M	M	R/O	R/O	R/O	R/O	R/O
Manager	H	M	M	R/O	R/O	R/O	R/O	R/O
Reject reason	H	R/O	R/O	R/O	M	R/O	R/O	R/O
Impact	H	H	M	R/O	R/O	R/O	R/O	R/O
Outage	H	H	M	R/O	M	R/O	R/O	R/O
Fallback plan	H	H	M	M	M	M	R/O	R/O
Parent change							R/O	R/O
Creation date	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Start date	H	H	M	M	M	R/O	R/O	R/O
End date	H	H	M	M	M	M	R/O	R/O

Last update	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Approval Date	H	H	H	M	H	R/O	R/O	R/O
Close date	H	H	H	H	H	H	H	R/O

Table key:

- H: hidden
- R/O: read-only
- M: mandatory

Normal Change



An ITIL normal change refers to changes that must follow the complete change management process. By definition a normal change will proceed through all steps of the change management process and will eventually be reviewed by the Change Advisory Board (CAB). The CAB will provide advice regarding the change to the person who is deemed responsible to approve or reject normal changes.

Normal Change Properties

Name	Type	Mandatory?
Ref	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: Approved, Assigned, Closed, Implemented, Monitored, New, Not approved, Planned and scheduled, Rejected, No Validated	
Title	Alphanumeric string	Yes
Description	Multiline character string	Yes
Approval comment	Alphanumeric string	No
Acceptance comment	Multiline character string	No
Caller	Foreign key to a(n) Person	No
Team	Foreign key to a(n) Team	No
Agent	Foreign key to a(n) Person	No
Supervisor team	Foreign key to a(n) Team	No
Supervisor	Foreign key to a(n) Person	No

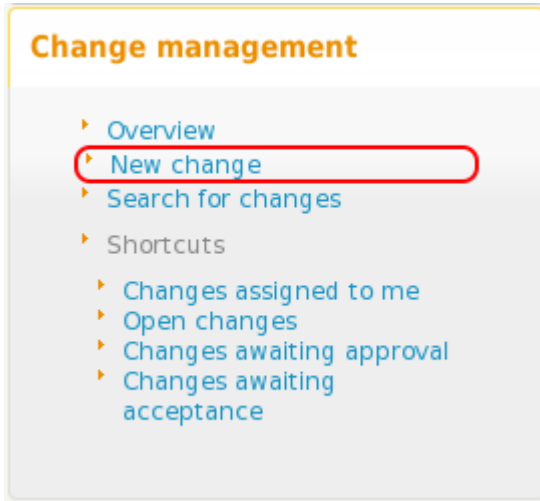
Manager team	Foreign key to a(n) Team	No
Manager	Foreign key to a(n) Person	No
Reject reason	Alphanumeric string	No
Impact	Alphanumeric string	No
Outage	Possible values: No, Yes	Yes
Fallback plan	Multiline character string	No
Parent change	Foreign key to a(n) Change	No
Creation date	Date and time (year-month-day hh:mm:ss)	No
Start date	Date and time (year-month-day hh:mm:ss)	No
End date	Date and time (year-month-day hh:mm:ss)	No
Last update	Date and time (year-month-day hh:mm:ss)	No
Approval Date	Date and time (year-month-day hh:mm:ss)	No
Acceptance date	Date and time (year-month-day hh:mm:ss)	No
Close date	Date and time (year-month-day hh:mm:ss)	No

Tabs

Tab	Description
CIs	All the configuration items impacted for this ticket
Contacts	All the contacts linked to this ticket
Work orders	All the work orders for this ticket
Related requests	All the user requests linked to this change
Related incidents	All the incidents linked to this change
Related problems	All the problems linked to this change
Child changes	All the sub changes linked to this change

Creating a Normal Change

Click on the “New change” menu:



Then select “Normal Change” in the form below:

Select the type of Change to create:

And click “Apply” to display the Normal Change creation form:

Cancel Create Validate Reject

Properties Cls Contacts Work orders Related requests Related incidents Related problems Child changes

Attachments

General Information

Ref

Organization -- select one --

Status New

Title

Description

Resolution

Relations

Parent change -- select one --

Dates

Creation date

Last update

Contacts

Caller -- select one --

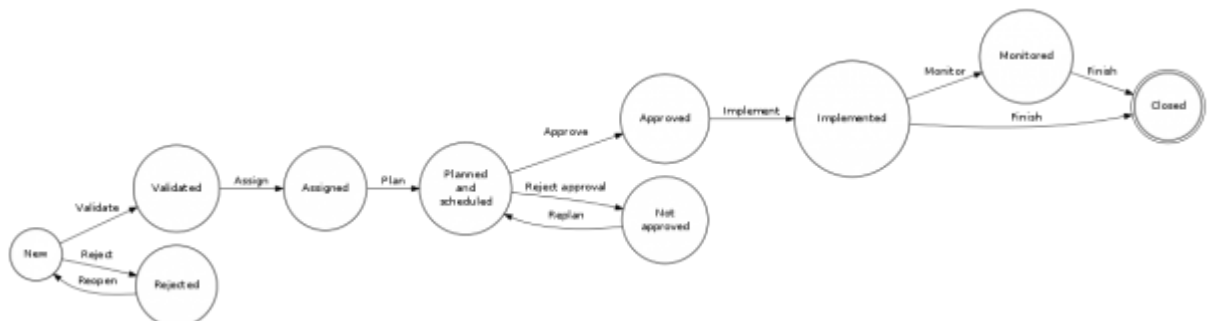
Private log

Type your text here:

Cancel Create Validate Reject

Normal Change Life Cycle

Normal Change objects have the following life cycle:



Depending on the status of the object, the constraints on the properties vary as shown on the table below:

Ne Validat Reject Assign Planned Approv Not Implement Monitor Close

	w	ed	ed	ed	and scheduling	ed	approved	ed	ed	d
Ref	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Organization					R/O	R/O	R/O	R/O	R/O	R/O
Status	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Title	M	M	M	M	M	M	M	R/O	R/O	R/O
Description		R/O		R/O	R/O	R/O	R/O	R/O	R/O	R/O
Approval comment	H	H	H	H	H	M	H	R/O	R/O	R/O
Acceptance comment	H	M	H		R/O	R/O	R/O	R/O	R/O	R/O
Caller									R/O	R/O
Team	H	M							R/O	R/O
Agent	H	H	H	M	M	M	M	M	R/O	R/O
Supervisor team	H	M	H	M	M	R/O	R/O	R/O	R/O	R/O
Supervisor	H	H	H	M	M	R/O	R/O	R/O	R/O	R/O
Manager team	H	M	H	M	M	R/O	R/O	R/O	R/O	R/O
Manager	H	H	H	M	M	R/O	R/O	R/O	R/O	R/O
Reject reason	H	R/O	M	R/O	R/O	R/O	M	R/O	R/O	R/O
Impact	H	H	H	H	M	R/O	R/O	R/O	R/O	R/O
Outage	H	H	H	H	M	R/O	M	R/O	R/O	R/O
Fallback plan	H	H	H	H	M	M	M	M	R/O	R/O
Parent change									R/O	R/O
Creation date	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Start date	H	H	H	H	M	M	M	R/O	R/O	R/O
End date	H	H	H	H	M	M	M	M	R/O	R/O
Last update	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O	R/O
Approval	H	H	H	H	H	M	H	R/O	R/O	R/O

Date

Acceptance date H M H R/O R/O R/O R/O R/O R/O

Close date H H H H H H H H H R/O

Table key:

- H: hidden
- R/O: read-only
- M: mandatory

Routine Change



An ITIL routine (standard) change quite simply refers to pre-approved changes. Pre-approved changes can be defined for a variety of tasks, but they will typically be low risk, low effort changes that have a low or known cost.

Routine Change Properties

Name	Type	Mandatory?
Ref	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: Approved, Assigned, Closed, Implemented, Monitored, New, Not approved, Planned and scheduled, Rejected, No Validated	No
Title	Alphanumeric string	Yes
Description	Multiline character string	Yes
Caller	Foreign key to a(n) Person	No
Team	Foreign key to a(n) Team	No
Agent	Foreign key to a(n) Person	No
Supervisor team	Foreign key to a(n) Team	No
Supervisor	Foreign key to a(n) Person	No
Manager team	Foreign key to a(n) Team	No
Manager	Foreign key to a(n) Person	No
Reject reason	Alphanumeric string	No

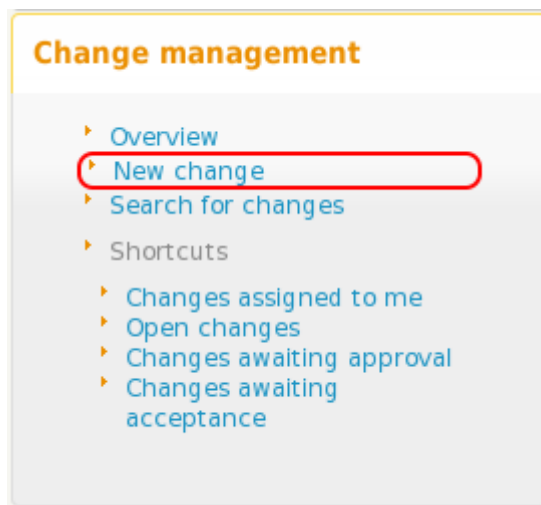
Impact	Alphanumeric string	No
Outage	Possible values: No, Yes	Yes
Fallback plan	Multiline character string	No
Parent change	Foreign key to a(n) Change	No
Creation date	Date and time (year-month-day hh:mm:ss)	No
Start date	Date and time (year-month-day hh:mm:ss)	No
End date	Date and time (year-month-day hh:mm:ss)	No
Last update	Date and time (year-month-day hh:mm:ss)	No
Close date	Date and time (year-month-day hh:mm:ss)	No

Tabs

Tab	Description
CIs	All the configuration items impacted for this ticket
Contacts	All the contacts linked to this ticket
Work orders	All the work orders for this ticket
Related requests	All the user requests linked to this change
Related incidents	All the incidents linked to this change
Related problems	All the problems linked to this change
Child changes	All the sub changes linked to this change

Creating a Routine Change

Click on the “New change” menu:



Then select “Routine Change” in the form below:

Select the type of Change to create:

And click “Apply” to display the Routine Change creation form:

Cancel Create Assign

Properties Cls Contacts Work orders Related requests Related incidents Related problems Child changes

Attachments

General Information

Ref

Organization -- select one --

Status New

Title

Description

Resolution

Resolution

Dates

Creation date

Last update

Relations

Parent change -- select one --

Contacts

Caller -- select one --

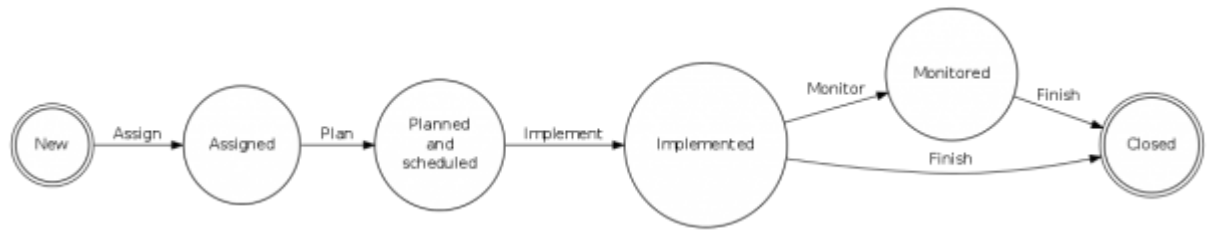
Private log

Type your text here:

Cancel Create Assign

Routine Change Life Cycle

Routine Change objects have the following life cycle:



Depending on the status of the object, the constraints on the properties vary as shown on the table below:

	New	Assigned	Planned and scheduled	Implemented	Monitored	Closed
Ref	R/O	R/O	R/O	R/O	R/O	R/O
Organization			R/O	R/O	R/O	R/O
Status	R/O	R/O	R/O	R/O	R/O	R/O
Title	M	M	M	R/O	R/O	R/O
Description		R/O	R/O	R/O	R/O	R/O
Caller					R/O	R/O
Team	H	M	M	M	R/O	R/O
Agent	H	M	M	M	R/O	R/O
Supervisor team	H	M	M	R/O	R/O	R/O
Supervisor	H	M	M	R/O	R/O	R/O
Manager team	H	M	M	R/O	R/O	R/O
Manager	H	M	M	R/O	R/O	R/O
Reject reason	H	R/O	R/O	R/O	R/O	R/O
Impact	H	H	M	R/O	R/O	R/O
Outage	H	H	M	R/O	R/O	R/O
Fallback plan	H	H	M	M	R/O	R/O
Parent change					R/O	R/O
Creation date	R/O	R/O	R/O	R/O	R/O	R/O
Start date	H	H	M	R/O	R/O	R/O
End date	H	H	M	M	R/O	R/O
Last update	R/O	R/O	R/O	R/O	R/O	R/O
Close date	H	H	H	H	H	R/O

Table key:

- H: hidden
- R/O: read-only
- M: mandatory

Assigning a user request to a team and agent

The list of teams to which you can assign a change is defined by the delivery model of the corresponding organization. When creating a change, the agent has to select the customer organization, then the list of teams is strictly limited to the teams defined for this customer. If a team is missing, the delivery model of the customer must be updated to reflect this need. See [More about Delivery model](#) for more information

Managing Private Log

A change ticket only have a private log to document all the activities and communications related to it. This one is not visible on the end user portal.

Managing impacted CIs and Contacts

This section is similar to the one of the Helpdesk module. Please refer to it

Problem Management Module

Problem



A *problem* is the cause of one or more *incidents* occurring in your IT. At the time the *problem* is recorded, the cause may be still unknown. Such tickets will allows IT engineers to document all the actions made to find the root cause and fix the issue.

The main difference between a *problem* and an *incident* is that an *incident* must be fixed as quickly as possible to reduce the unavailability period of the service, whereas the problem will focus on identifying the root cause. While the root cause remains undefined, a workaround is provided to help in fixing corresponding recurring *incidents*.

The *problems* are managed by users having the profile **Problem manager**.

Problem Properties

Name	Type	Mandatory?
Ref	Alphanumeric string	Yes
Title	Alphanumeric string	Yes
Organization	Foreign key to a(n) Organization	Yes
Status	Possible values: Assigned, Closed, New, Resolved	Yes
Priority	Possible values: Critical, High, Medium, Low	Yes
Service	Foreign key to a(n) Service	No
Service subcategory	Foreign key to a(n) Service Subcategory	No
Product	Alphanumeric string	No
Impact	Possible values: A Department, A Service, A person	Yes
Urgency	Possible values: critical, high, medium, low	Yes
Description	Multiline character string	Yes
Start date	Date and time (year-month-day hh:mm:ss)	No
Last update	Date and time (year-month-day hh:mm:ss)	No
Assignment Date	Date and time (year-month-day hh:mm:ss)	No
Resolution Date	Date and time (year-month-day hh:mm:ss)	No
Close date	Date and time (year-month-day hh:mm:ss)	No
Caller	Foreign key to a(n) Person	No
Team	Foreign key to a(n) Team	No
Agent	Foreign key to a(n) Person	No
Related Change	Foreign key to a(n) Change	No

Tabs

Tab	Description
CIs	All the configuration items impacted for this ticket
Contacts	All the contacts linked to this ticket
Known Errors	All the known errors that are linked to this problem
Work orders	All the work orders for this ticket
Related requests	All the requests that are related to this problem

Creating a Problem

Click on the “New problem” menu:

Problem Management

- Overview
- **New problem**
- Search for problems
- New known error
- Search for known errors
- Shortcuts
 - My problems
 - All open problems
 - All known errors
 - FAQ categories
 - FAQs

The following form is displayed:

The screenshot displays a web-based interface for managing problem tickets. At the top, there are three buttons: 'Cancel', 'Create', and 'Assign'. Below these is a horizontal navigation bar with tabs for 'Properties', 'CIs', 'Contacts', 'Known Errors', 'Work orders', 'Related requests', and 'Attachments'. The 'Properties' tab is currently selected.

The main content area is divided into several sections:

- General Information:** Contains fields for 'Ref', 'Title' (with a red warning icon), 'Organization' (dropdown with '+', '-'), 'Status' (set to 'New'), 'Priority' (set to 'Critical'), 'Service' (dropdown with '+'), 'Service subcategory' (dropdown with '+'), and 'Product'.
- Dates:** Contains fields for 'Start date' and 'Last update'.
- Contacts:** Contains a 'Caller' dropdown with a '+' button.
- Relations:** Contains a 'Related Change' dropdown with a '+' button.
- More Information:** Contains 'Impact' (dropdown set to 'A Department'), 'Urgency' (dropdown set to 'critical'), and a large 'Description' text area with a red warning icon.
- Private log:** A large text area for logging private activities, with the placeholder text 'Type your text here:'.

At the bottom of the interface, there are three buttons: 'Cancel', 'Create', and 'Assign'.

Managing Private Log

A problem ticket only have a private log to keep track of all the activities and communications related to it.

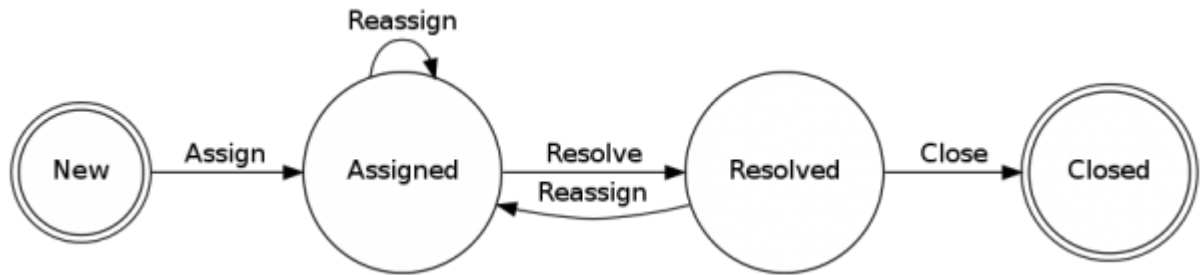
This log is not visible on the end user portal.

Managing CIs and Contacts

Unlike the incident and change management modules, the lists of CIs and contacts that are linked to a problem are managed manually.

Problem Life Cycle

Problem objects have the following life cycle:



Depending on the status of the object, the constraints on the properties vary as shown on the table below:

	New	Assigned	Resolved	Closed
Ref	R/O	R/O	R/O	R/O
Title			R/O	R/O
Organization			R/O	R/O
Status	R/O	R/O	R/O	R/O
Priority	R/O	R/O	R/O	R/O
Service			M	R/O
Service subcategory				R/O
Product				R/O
Impact			R/O	R/O
Urgency			R/O	R/O
Description			R/O	R/O
Start date	R/O	R/O	R/O	R/O
Last update	R/O	R/O	R/O	R/O
Assignment Date	H	R/O	R/O	R/O
Resolution Date	H	H	H	H
Close date	H	H	H	R/O
Caller			R/O	R/O
Team	H	M	R/O	R/O
Agent	H	M	R/O	R/O
Related Change				R/O

Table key:

- H: hidden
- R/O: read-only

- M: mandatory

Known Errors Database Module

FAQ



The frequently asked questions (FAQs) answer the most common questions asked by users about a service. FAQs can easily solve common problems.

FAQ Properties

Name	Type	Mandatory?
Category	Foreign key to a(n) FAQ Category	Yes
Title	Alphanumeric string	Yes
Error code	Alphanumeric string	No
Key words	Alphanumeric string	No
Summary	Multiline character string	No
Description	HTML string	No

Creating a FAQ

The menu “FAQs” provides a list of FAQ. Just click on the button “New” to create a new one

FAQ Category

No description for this class. A yellow button with a wrench icon and the text "Fix Me!".

FAQ Category Properties

Name	Type	Mandatory?
Name	Alphanumeric string	Yes

Tabs

Tab	Description
FAQs	All the frequently asked questions related to this category

Known Error



The *known errors* are part of the *problem management* process. They are used to document known issues even if the problem is not completely fixed, for instance by providing a workaround. This improves the efficiency of the *incident management* process.

A *known error* can be linked to *configuration items*. When a ticket is linked a CI then the known errors related to that CI are displayed automatically in the ticket.

You can link documents to a known error.

Known Error Properties

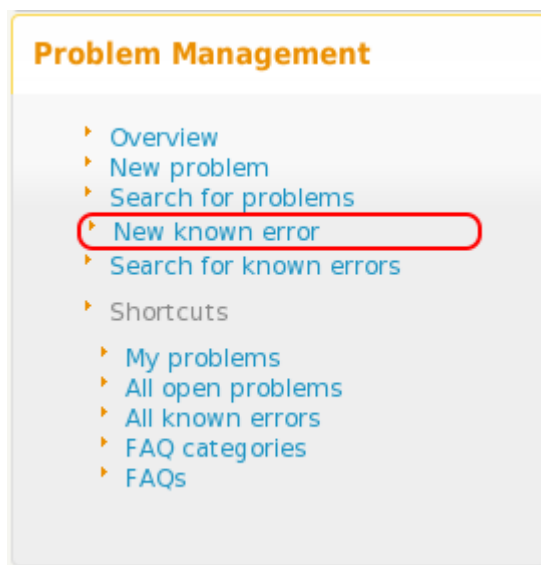
Name	Type	Mandatory?
Name	Alphanumeric string	Yes
Customer	Foreign key to a(n) Organization	Yes
Related Problem	Foreign key to a(n) Problem	No
Error Code	Alphanumeric string	No
Domain	Possible values: Application, Desktop, Network, Server	Yes
Vendor	Alphanumeric string	No
Model	Alphanumeric string	No
Version	Alphanumeric string	No
Symptom	Multiline character string	Yes
Root Cause	Multiline character string	No
Work around	Multiline character string	No
Solution	Multiline character string	No

Tabs

Tab	Description
CIs	All the configuration items that are related to this known error
Documents	All the documents link to this known error

Creating a Known Error

Click on the “New known error” menu:



The following form is displayed:

Cancel Create

Properties Cls Documents

Name ⓘ

Customer -- select one -- ⓘ

Related Problem -- select one --

Error Code

Domain Application

Vendor

Model

Version

Symptom ⓘ

Root Cause

Work around

Solution

In addition to its name, and the corresponding organization, a known error can be characterized by the following attributes:

- Error code
- Domain
- Vendor
- Model
- Version

Most of the time, a known error should be linked to a problem. This way, support agents can quickly get the relevant information to troubleshoot and fix.

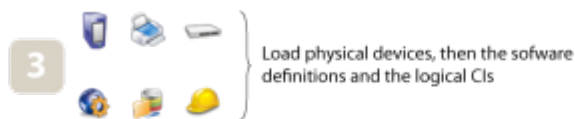
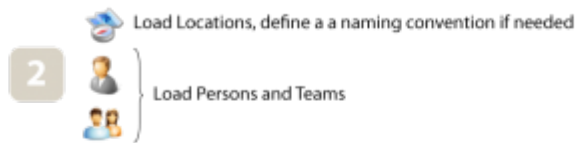
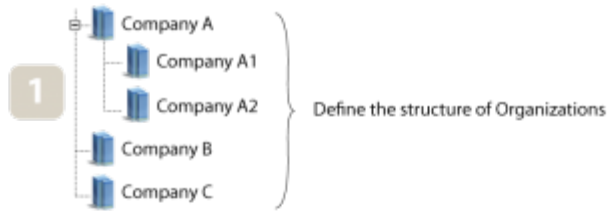
iTop implementation guide

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 a User Request ticket, you need to make sure that the caller for this request exists, that there is at least one contract documented for this customer defining the services delivered to this customer, etc. This document explains the order to be followed for creating the objects in iTop.

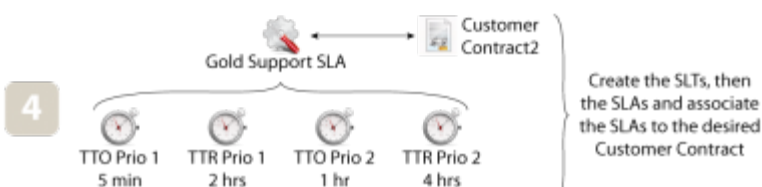
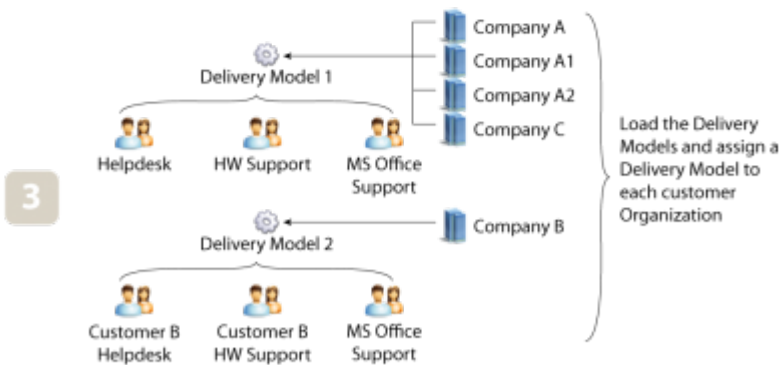
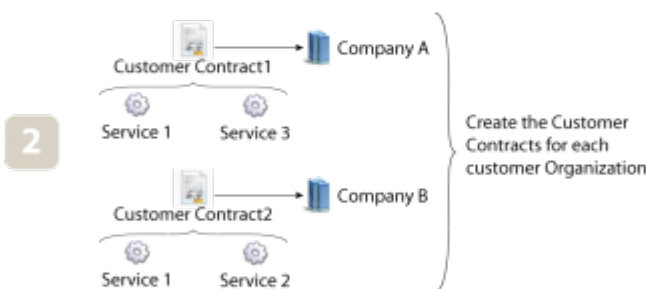
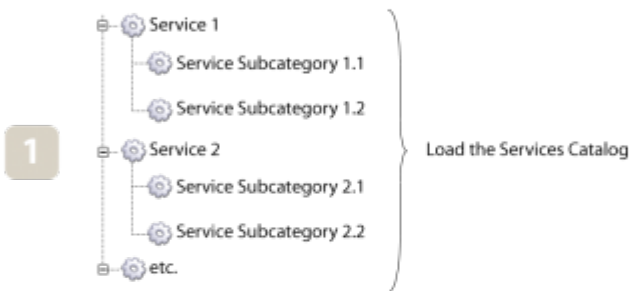
For creating a *clean* production environment it is better to start from an iTop instance installed *without* the sample data. However you can also install another instance of iTop *with* the sample data to have a quick look at the basic data needed to produce a fully functional instance.

The following schema summarizes the on-boarding process:

Configuration Management



Service Management



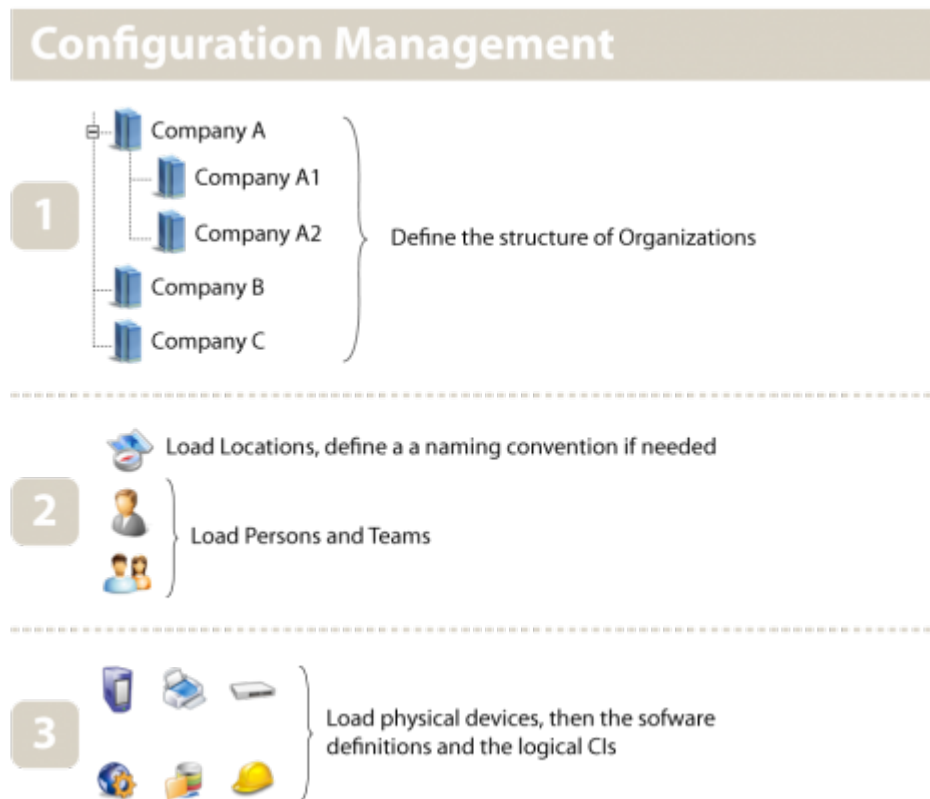
This document does not describe in details how to use all the features of iTop. For more details about the usage of iTop, refer to the “[iTop User Manual](#)” .

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. The steps to create each class of object from the menu is explained in details in the [Data Model Documentation](#), but there are two other ways that can be convenient for an administrator:

- **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 in CSV format: as a 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:** to create a new object of any 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.

Configuration Management



Creating organizations

When planning a deployment of iTop, the first decision to be made is about the structure of Organizations. In iTop, Organizations are used for two main purposes: the description of customers and providers entities and the partitioning of the data, from the security point of view. Almost all the objects loaded in iTop have a relation with an Organization, therefore it is important to create a proper structure of Organizations before loading other objects into iTop.

Understanding customers and providers

In iTop, there is nothing such as a “customer” or a “provider”, there are only Organizations. Like in real life, whether an Organization is a customer or provider depends on the point of view. For example the Organization “Company A” can be a customer of “Company B” and at the same time a provider for “Company C”. The customer/provider relations in iTop are represented using Contracts. “Company A” is a customer of

“Company B” if there is a Customer Contract with “Company B” as the provider and “Company A” as the customer.

What is the difference between Customer Contracts and Provider Contracts?

A Provider Contract is a slightly simplified version of the Customer Contract, with two limitations:

- A Provider Contract is not related to any Service from the service catalog.
- The Service Level Agreement is documented as a free text field on Provider Contracts and therefore cannot be used for automated computations in iTop.

Provider Contracts are useful for documenting contracts with third party suppliers (called underpinning contracts in the ITIL terminology), for which no tickets will be tracked in iTop.

You can of course use Customer Contracts for describing the contractual relation with a third party supplier, but this means that you have to also document in iTop the service catalog of this supplier.

Organizations and access rights

Apart from the customer/provider relations, another reason to create several Organizations in iTop is to restrict access to some areas of the managed data.

In iTop the rights to “read” (or display) objects from the database is defined on a per Organization basis. Each user is given (in the definition of her/his account) the rights to access a set of Organizations.

Organizations can be structured as a hierarchy. When this is the case, the access rights are inherited from the “Parent” Organization to the “Child” Organizations. For example, if “Company A” has two child Organizations: “Company A1” and “Company A2”, then if a user has the rights to access the objects in “Company A”, she/he will also be allowed to access the objects in “Company A1” and “Company A2”. On the other hand, a user who is allowed to access only “Company A1” will be allowed to access neither the objects in “Company A” nor those in “Company A2”.

The rights to “write” (i.e. create, modify or delete) objects are defined only by the profile(s) assigned to the user account. For example the profile “Support Agent” gives the rights to create

or modify User Request tickets (but not to delete them).

This means that a user has the same access rights over all Organizations that she/he is allowed to access.

For example, in the current version of iTop, a user cannot have the rights to access the data of the Organizations “Company A” and “Company B” and the rights to create Servers only in “Organisation B”. If she/he is given the rights to create Servers, this will apply to both “Company A” and “Company B”.

Creating 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.

Carefully plan the creation of the Locations. Locations are difficult to identify (there is no commonly accepted unique identifier for a Location), if your company does not have one already, you may want to put in place a *naming convention* in order to avoid duplicate Locations in the CMDB.

Shared Locations

In Enterprise environments, even though the split of roles and responsibilities are in favor of creating several sub Organizations, it is often needed to have “shared” locations among several Organizations to document “co-locations”. iTop does not provide – in its standard version – a way to actually “share” objects between Organizations. However, the Locations are “inherited” from parent Organizations to child Organizations in the same manner as the access rights. This means that a Person, a Server or a Network Device belonging to “Company A2” can be located on a Location owned by “Company A”.

Creating Persons

The Persons are very important in iTop as they are used to define all the contacts and their responsibilities. A Person belongs to one and only one organization. A Person can be a member of one or more Team(s), and therefore should be created before trying to setup Teams.

Also, each user record is linked to a Person object. Therefore Persons must be created before loading user accounts into iTop. The user record defines the access rights (and identification method), whereas the Person object defines the information about the contact: name, location, email address, telephone...

Creating Teams

The teams are linked to several types of object, like contracts or tickets, in order to define responsibilities. Teams are also used as “workgroups” for assigning tickets. Teams 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 is useful to define the role of the Person in the Team (Team Leader, Manager...).

Devices and Software CIs

Once the structure of the Organizations, the Locations and the contacts (Teams and Persons) have been loaded, you can start to populate the CMDB.

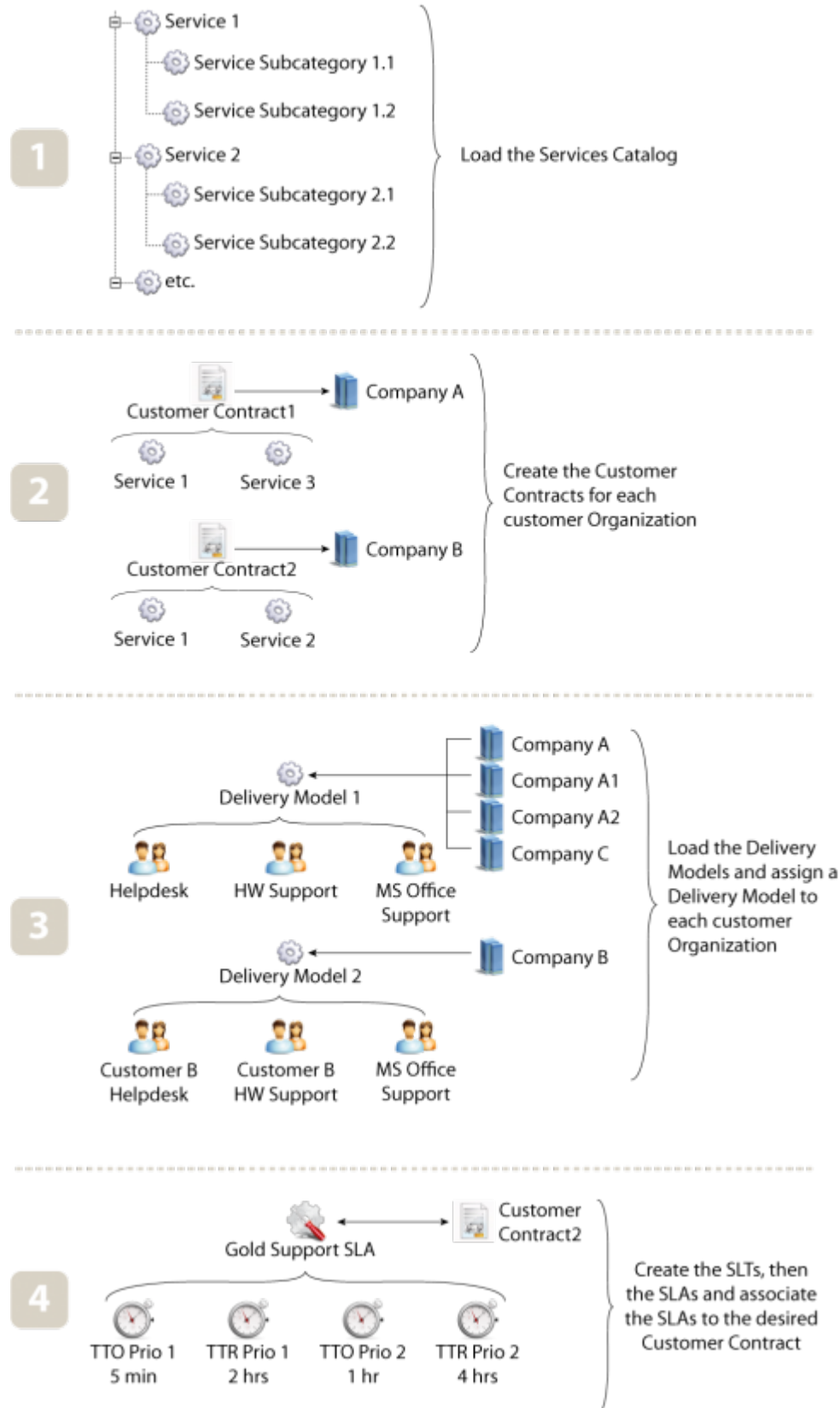
Since the software instances depend on the software types defined in the software catalog and are documented as installed on a particular host, you should start by documenting:

- The physical infrastructure: Servers, Network Devices, PCs, etc...
- The Software catalog, by creating the needed type of “Software” objects

Service Management

Before managing tickets in iTop, the *services catalog*, the *Delivery Models* and the *contracts* must be defined.

Service Management



Services Catalog

The “Services Catalog” is the list of Services that are available from a given provider Organization. The Services Catalog is documented in iTop by creating Service objects, assigned to the given Organization (considered as the provider of the service). Services are organized in a two-level hierarchy, through the two classes of objects: **Service** and **Service Subcategory**. Create the top level Services before loading sub categories.

An optional third level “Service Family” can be used to group Services together, but this level is not used by the ticketing in iTop.

Once the service catalog (Services and Service Subcategories) is defined, create the Customer Contracts that will link each “customer” Organization to its “providers” by creating one Customer Contract per couple of provider/customer and linking the appropriate Services to the contract.

Delivery Model

The Delivery Model is the object that defines which Team works for which customer. You can use a Delivery Model object to group together all the “support teams” for a given set of Services, or the support Teams dedicated to a particular customer. Each customer Organization must be assigned one, and only one, Delivery Model.

In the standard iTop 2.0 data model, there is no link between Teams and Services. The only limitation when assigning a ticket to a Team is that the Team must be part of the Delivery Model assigned to the Organization which is the customer of the ticket.

For example, if you have the following Teams:

- **Helpdesk team:** a Team that processes all helpdesk requests/calls.
- **MS Office Support Team:** a Team that processes all support requests about MS Office.
- **Hardware Support Team:** a Team that handles hardware calls (Replacements, new hardware orders)
- **Network Support Team:** a Team that handles network related issues
- **Customer B Helpdesk Team:** a helpdesk team dedicated to Customer B
- **Customer B Hardware Team:** a Team handling hardware calls for Customer B

You can then build two different Delivery Models:

- “Delivery Model 1” composed of:
 - Helpdesk Team
 - MS Office Support Team
 - Network Support Team
- “Delivery Model 2” composed of:
 - Customer B Helpdesk Team
 - Customer B Hardware Team
 - MS Office Team

The “Delivery Model 1” will be used by the Organizations “Customer A” , “Customer A1” , “Customer A2” and “Customer C” ; whereas “Delivery Model 2” will be used by “Customer B” .

Service Level Agreements and Targets

The definition of Service Level Agreements (SLAs) and Service Level Targets (SLTs) are not mandatory to manage tickets in iTop, but without them iTop can neither compute deadlines for processing a ticket, nor escalate the ticket automatically.

In order to compute whether or not the expected Service Level Agreements are respected, iTop introduces two possible types of metrics called SLTs (Service Level Targets):

- **TTO (Time To Own)**: the time between the creation of a ticket and its assignment to an Agent.
- **TTR (Time To Resolve)**: the time between the creation of a ticket and its resolution (i.e. measured when the ticket enters the state “resolved”)

A SLT defines a duration associated with:

- A **metric**: either TTO or TTR
- A **type of ticket** (incident or user request)
- A **priority** (since tickets with higher priority should generally be processed more quickly)

A SLA is simply defined as a named group of SLTs (for example to distinguish between “Gold” and “Silver” service levels).

The definition of SLAs/SLTs have two effects in iTop:

- Notifications can be defined for any percentage of the “threshold” associated with one of the metrics (for example one can configure notifications to send an email to the agent working on a ticket when 50% of the Time To Resolve is reached and to the team leader when reaching 75%).

- When 100% of a metric is reached, the ticket is automatically set to a special “escalation” state (there are two specific states defined in the tickets’ life-cycle: Escalation TTO and Escalation TTR). Entering such a state can also be used to trigger specific notifications.

For example, one can define the following service level matrix:

Incidents – Priority High	Incidents – Priority Medium	Requests – Priority High	Requests – Priority Medium
Time To Own: 5 min	Time To Own: 30 min	Time To Own: 30 min	Time To Own: 4 hours
Time To Resolve: 1 hour	Time To Resolve: 4 hours	Time To Resolve: 4 hours	Time To Resolve: n/a

This would lead to creating 4 SLTs, one for each row of the table. These 4 SLTs can be grouped under one SLA named “Gold Service Level” .

Finally SLAs can be associated to Customer Contracts in order to define the applicable metrics for the contract.

Your iTop instance is now ready to run. You may have a look at the [Configuration of Notifications](#) to setup email notifications for the tickets.