

[< SERVICE TOOLS \(/ONLINE-COURSES/SERVICE-TOOLS\)](#)

## ITSM tools

ARTICLE | 15 MIN.  
ITSM in Creatio (</node/531084/course-object/66>)

**2** ARTICLE | 15 MIN.  
Additional reading (</node/531084/course-object/139>)

**3** TEST QUESTIONS | 5 MIN. (</node/531084/course-object/77>)

**4** PRACTICAL TASK | 15 MIN. (</node/531084/course-object/101>)

ARTICLE | ITSM in Creatio

15 min.

## What is ITSM

In short, ITSM ([https://en.wikipedia.org/wiki/IT\\_service\\_management](https://en.wikipedia.org/wiki/IT_service_management)) (or IT service management) is a methodology based on delivering IT as a service.

ITIL (<https://en.wikipedia.org/wiki/ITIL>), a framework that represents best practices in IT service management, defines ITSM as “implementation and management of quality IT services that meet the needs of the business.”

Based on that approach, ITSM boils down to a set of processes that enable IT departments to create, deliver, support and manage IT services.

## ITSM processes

Let's have a look at core ITSM processes and how they are implemented in Creatio. ITIL v3 has nine core processes:

Process	Implementation in Creatio	Service Creatio, customer center edition	Service Creatio, enterprise edition
Service catalogue management	“Services” section	+	+
Service level management	“Service agreements” section		+
Incident management	“Cases” section	+	+
Service request management	“Cases” section	+	+
Problem management	“Problems” section		+
Configuration management	“Configuration items” section		+
Change management	“Changes” section		+
Release management	“Releases” section		+
Knowledge management	“Knowledge base” section	+	+

## Service catalogue management

IT service design is one of the key focuses in ITSM. This focus finds its implementation in the “Service catalogue management” process, most of which is handled in the “Services” section in Creatio.

Name	Status	Response time	Resolution time
Web-site usage	Active	Working hours: 1	Working hours: 5
User authentication	Active	Working days: 1	Working days: 2
Technical problems	Active	Working hours: 4	Working days: 2
Technical features	Active	Working hours: 4	Working days: 1
Software configuration (sample)	Active	Calendar hours: 8	Calendar days: 2
Restoration of telephony	Active	Working hours: 1	Working days: 2
Reports generation	Active	Working hours: 4	Working days: 2
Password recovery	Active	Working hours: 1	Working hours: 4
Lost data recovery	Active	Working days: 1	Working days: 3
Information request	Active	Working days: 2	Working days: 4
Hardware replacement	Active	Working days: 1	Working days: 3
Errors in the equipment operation	Active	Working hours: 2	Working days: 2
Diagnostics and adjustment of hardware	Active	Working days: 1	Working days: 3
Consultations on the software setting	Active	Working hours: 4	Working days: 2
Consultations on the equipment usage	Active	Working days: 1	Working days: 3
Consultations on the company's products	Active	Working hours: 3	Working days: 1

(/sites/default/files/images/training/enu\_service\_section.png)

This section provides IT departments with the following ITSM tools:

- Unified service catalogue

- Service categories and priorities

- Deadlines for processing incidents and service requests for each service

- Assigning responsible individuals for processing incidents and service requests for each case

- Service history

- Analytics

## Service level management

Different types of users are usually eligible for different “service levels”. For example, incidents registered internally from the Finance department may require faster resolution deadlines than those from other departments. Alternatively, certain users may not be eligible for certain services.

In ITSM, “service levels” are specified in “Service agreements”. In Creatio, these are managed in the “Service agreements” section.

Number	Title	Status	Start	Due	Assignee
1	1 — Default service contract	Active	3/12/2017	3/11/2021	John Best
10	10 — Our company - Administration/Development	Active	3/19/2015	4/3/2019	John Best
1	2 — Accom (sample)	Active	1/16/2017	6/12/2017	John Best
2	2 — Alpha Business	Active	4/8/2018	4/8/2021	John Best
3	3 — Build Technologies	Active	11/24/2017	11/24/2020	John Best
4	4 — Axiom	Active	4/14/2018	4/14/2020	John Best
5	5 — Apex Solutions	Active	4/15/2018	4/15/2020	John Best
52	52 — Clearsoft - Sales/Administration	Completed	3/2/2017	3/2/2018	John Best
53	53 — Creative Solutions	Active	3/23/2018	3/23/2020	John Best
58	58 — Nicholas Mason	Completed	7/16/2017	1/16/2018	John Best
71	71 — Apex Solutions	Active	9/23/2017	9/23/2020	John Best
72	72 — Elite Systems	Active	10/1/2017	10/2/2019	John Best
75	75 — Excellence Marketing	Active	10/13/2017	10/13/2020	John Best
76	76 — Apex Solutions - Sales	Active	10/15/2017	10/15/2020	John Best
77	77 — Durable Industries - Marketing/Sales	Active	10/23/2017	10/23/2020	John Best
78	78 — Elite Systems	Active	11/16/2017	11/16/2020	John Best

(/sites/default/files/images/training/enu\_service\_agreements\_section.png)

Service agreements exist to outline when and how services are provided to both external customers and internal staff. You can define individual terms of service and view the analytics for each service agreement.

There are three types of service agreements in Creatio:

## 10 — Our company - Administration/Development

SAVE CANCEL ACTIONS

Title\* 10 — Our company - Administration/Development

Type\*

Status\* OLA

Start\* SLA

End\* UC

< CONTRACT PROVISIONS HISTORY ATTACHMENTS AND NOTES FEED

Service recipients

Services + :

Service	Status
Password recovery	Active
Category Incident	

(/sites/default/files/images/training/enu\_service\_agreements\_type.png).

OLA – or “Operational Level Agreement” covers services provided internally, to different users and departments within the company.

SLA – or “Service Level Agreement” covers services provided to customers.

UC – or “Underpinning Contract” covers third-party services that are critical to IT services that are provided to customers. For example, your email server may be deployed in a data center. In this case, the services provided to you by the data center are critical to IT services (in this case email) that you provide to your customers or internal users.

Apart from the agreements with the service consumers, this section must contain an agreement that includes the minimum set of services. This agreement can be used to obtain customer support service when no appropriate service agreement found for a particular case. The default service agreement created must be specified in the corresponding system setting.

Each customer (internal or external) can have individual service conditions, such as:

Service objects

## Services

### Service timeframes and issue resolution deadlines

Creatio stores the entire service history, cross-referenced with service agreements, customers, configuration, etc. It also tracks whether service agreements are out-of-date and whether the service level provided matches the corresponding service agreement.

## Incident management

Any event that is not a part of a normal functioning of a service is called an “Incident”. Most of the time, incidents are encountered by service users and reported to service providers, generating “support tickets” or “cases”. Support providers take action to restore normal operation of affected services.

In Creatio, incidents are managed in the “Cases” section, each case representing a support ticket.

Number	Subject	Category	Assignee	Status	Resolution time
SR00000039	It is necessary to restore access to remote desktop	Service request	John Best	In progress	11/11/2018 2:00 AM
SR00000041	The customer cannot create an account on the site	Service request	John Best	In progress	11/11/2018 5:00 AM
SR00000036	Missing data on hard drive	Service request	John Best	In progress	11/7/2018 1:00 AM
SR00000026	Laptop frequently shuts down	Service request	John Best	Closed	11/3/2018 11:00 PM
SR00000042	Color laserjet pro CP1025nw - printing issues	Service request	John Best	In progress	11/8/2018 12:21 PM
SR00000008	From time to time breaks off Wi-Fi connection	Service request	John Best	Closed	9/15/2018 11:00 PM
SR00000033	The laptop began to work very loud	Service request	John Best	Closed	11/7/2018 11:00 PM
SR00000043	Recovering password to login to the system	Service request	John Best	In progress	11/9/2018 1:14 AM
SR00000046	Consultation on settings	Incident	John Best	Waiting for response	11/3/2018 4:00 PM
SR00000044	OS installation	Incident	John Best	Resolved	9/3/2018 1:00 PM
SR00000034	Laptop diagnostics	Incident	John Best	Resolved	11/9/2018 3:00 PM
SR00000047	Consultation on functionality	Incident	John Best	Closed	11/6/2018 10:00 AM
SR00000045	Consultation on settings	Incident	John Best	Closed	9/4/2018 6:00 PM

(/sites/default/files/images/training/enu\_cases\_section.png)

The “Cases” section provides a comprehensive list of incidents, past and current. Creatio comes with out-of-the-box incident management ITSM processes that cover:

Incident registration

Incident categories and classification

Matching and linking similar incidents

Investigation and resolution

Closure

Creatio also notifies both customers and staff on incident progress, tracks incident history, and customer feedback.

## Service request management

Any formal request for information, consultation or access to an IT service constitutes a “Service request”. In Creatio, service requests are managed as a separate type of cases.

The screenshot shows the Creatio Service Request Management interface. On the left is a sidebar with navigation options: Service, Contacts, Accounts, Cases (highlighted), Activities, Services, Service agreements, Configuration items, Problems, Changes, Releases, Knowledge base, Queues, Queues settings, Landing pages and web forms, Feed, and Dashboards. The main area displays a case titled "Case #SR00000042: Color laserjet pro CP1025nw - printing issues". The case status is "In progress". The resolution time is 11/8/2018 12:21 PM, with a remaining time of > 14 d. The priority is Medium. The contact is Alexander Wilson, and the account is Alpha Business. The category is Service request, and the service is Consultations on the equipment usa... The configuration item is 71 - Apex Solutions. The assignee group is 1st-line support, and the assignee is John Best. The case history shows a message from John Best to Alexander Wilson on 11/5/2018 at 4:48 PM, with the subject "Re: Color laserjet pro CP1025nw - printing issues". The message content includes a thank you and a description of the problem: "The problem started when I tried to print a document using the Adobe Reader. It printed the first page, and now it won't print anything from any source at all. I was on the phone with HP support yesterday and they took control of my computer and did a bunch of clicking and somehow it fixed it - but I'm concerned that it'll happen every time that I try to use the Adobe Reader. I'm not sure if I know how to fix it without calling someone every day. I've uninstalled the Adobe Reader, and installed the Adobe Acrobat instead, but I print a lot using Adobe products, so I".

(/sites/default/files/images/training/enu\_service\_request.png)

In addition to centralized storage of both current and past service requests, the “Cases” section provides best practice procedures for service request management. They cover:

- Registration and classification of service requests

- Approvals of service requests

- Execution of service requests

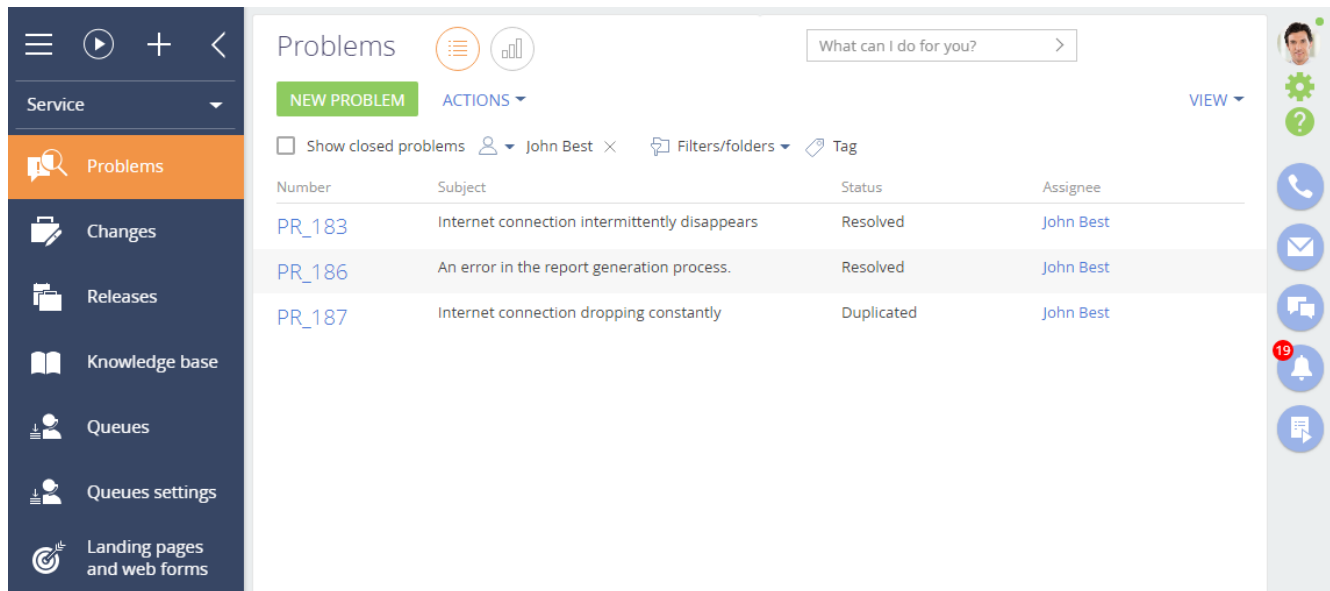
- Service requests closure and evaluation

Creatio also stores complete history of service requests and their execution, records which solution was provided and when and links service requests to knowledge base articles for more efficient resolution of future service requests.

Finally, just as it does with incidents, Creatio tracks service request timeframes, deadlines, and their fulfillment.

## Problem management

If several incidents have the same causes, it constitutes a problem. Problems are an important part of ITSM, as their continuous identification and resolution improve the overall quality or efficiency of provided services.



(/sites/default/files/images/training/enu\_problems\_section.png)

Creatio provides several problem management functions, namely:

- Registration of problems and known errors
- Prioritizing problems and their classification
- Linking problems to services and configuration items
- Assigning problem owners
- Managing resolution deadlines for problems
- History of problem resolution, tracking changes in IT infrastructure
- Analysis of problem detection and resolution

## Change management

One way or another, IT infrastructure undergoes certain changes over time. ITSM requires that any possible effects of these changes on the quality and stability of provided services are always monitored, assessed and controlled. Even if implemented as part of a problem resolution, changes may affect other services.



Number	Subject	Category	Assignee	Status	Actual end date
CR-105	Install OS	Urgent	Mary King	Closed	12/30/2018 7:25 AM
CR-104	Optimize the web-form	Normal	Caleb Jones	Closed	11/12/2018 11:27 AM
CR-107	Fix the report loading errors	Normal	John Best	Closed	11/11/2018 9:18 AM
CR-101	Implement automatic authorization	Normal	John Best	Closed	11/9/2018 9:01 AM
CR-106	Test performance loss	Normal	Mary King	Canceled	11/3/2018 8:00 AM
CR-119	Fix the telephony	Urgent	Megan Lewis	Closed	11/3/2018 6:07 AM
CR-103	Increase server RAM	Urgent	Mary King	Closed	10/25/2018 4:00 PM
CR-102	Test CPU cooling	Normal	Caleb Jones	Closed	10/18/2018 9:08 AM
CR-113	Adjust the login page	Urgent	John Best	Closed	10/17/2018 3:12 PM
CR-111	Reflash the motherboards	Normal	Caleb Jones	Closed	10/12/2018 10:27 AM
CR-114	Replace the cooler	Normal	Megan Lewis	Closed	10/11/2018 10:14 AM
CR-112	Fix the device	Urgent	Caleb Jones	Closed	10/10/2018 10:33 AM
CR-109	Reflash the device	Normal	Mary King	Closed	10/4/2018 9:04 AM

(/sites/default/files/images/training/enu\_changes\_section.png)

Change management functions in Creatio include:

- Unified registry of changes, both planned and implemented

- Classification and prioritization of changes

- Linking changes to cases and problems

- Planning and tracking deadlines for implementation of changes

- Distribution of change-related tasks by owners

- A complete history of change implementation

- Labor costs monitoring

## Release management

A set of simultaneously implemented changes is called a “Release”. Releases help track which changes become integrated in the IT infrastructure and when. They are milestones for updating policies, services and other ITSM elements that depend on the IT infrastructure.

**Service**

- Accounts
- Cases
- Activities
- Services
- Service agreements
- Configuration items
- Problems
- Changes
- Releases**
- Knowledge base

## Releases

NEW RELEASE
ACTIONS ▾

VIEW ▾

Filters/folders ▾
Tag

#	Title	Status
1	Patching software for project management (sample)	Planned
10	Server System Patriot Tower E3-1220V3	Released
11	Server System Patriot Tower E3-1220V3 urgent fix	Released
12	Asus VivoBook S550CA 34535334 laptop release	Released
13	Employees PCs update	Released
14	bpm'online community	Testing
15	bpm'online ITIL service operations	Released
16	bpm'online ITIL service transitions	Released
17	Lenovo ThinkPad E540 laptop release	Deployment
18	Server Patriot Tower E3-1220V3	Development

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Release management tools in Creatio include:

## Planning and monitoring release deadlines

## Managing the list of changes that goes into each release

## Monitoring resources and personnel

Complete release history

## Configuration management

In ITSM terms, an IT infrastructure is referred to as “Configuration.” A configuration consists of

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