❮ SERVICE TOOLS (/ONLINE-COURSES/SERVICE-TOOLS)

ITSM tools

ARTICLE | ITSM in Creatio   15 min.

What is ITSM

In short, ITSM (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.

(/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.

(/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:

(/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.

(/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.

(/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.
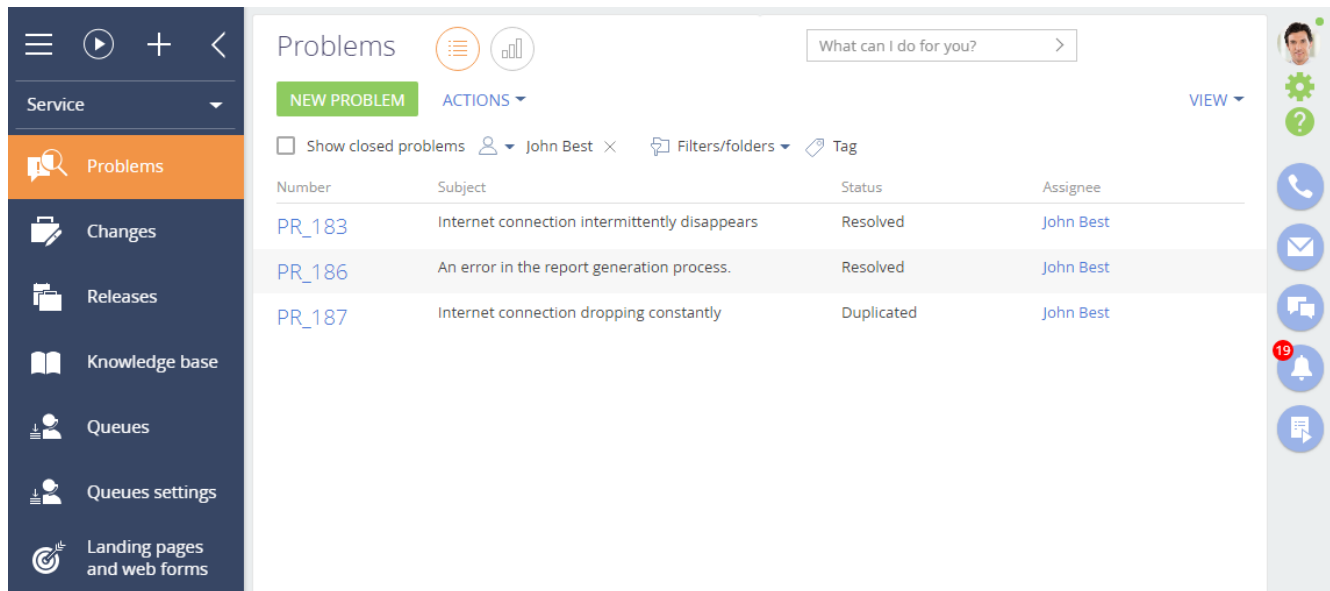
(/sites/default/files/images/training/enu_problems_section.png)

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.

(/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.

(/sites/default/files/images/training/enu_release_section.png)

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