OTRS::ITSM Administration Manual

Release 7.0

OTRS AG

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Contents

CHAPTER 1

Introduction

This manual is intended for OTRS::ITSM administrators and users to provide information on the basic use of OTRS::ITSM by IT service managers, IT service staff (agents) and end users (customers). Information pertaining to the installation, configuration and administration of OTRS::ITSM is only provided if there are differences to the OTRS core product or for functions, which only exist in OTRS::ITSM.

IT is expected to consistently deliver high service quality in an increasingly complex field. In this context, effective and efficient incident and problem management are indispensable. However, IT service management remains a task almost impossible if there is no consistent and up-to-date database with information about the state and configuration of the IT infrastructure.

The IT Infrastructure Library®, short ITIL®, is a series of books published by the United Kingdom's Office of Government Commerce (OGC), which generically combine best practice approaches to designing, providing, operating and managing IT services. ITIL does not focus on the technology but the services provided by the IT and comprises information on processes, roles, responsibilities, potential problem fields/resolutions, and definitions of terms.

ITIL has established itself as de facto standard over the past years and its circulation in IT organizations has contributed considerably to the development of a collective awareness and consistent terminology for IT service management. However, ITIL only describes **who should do what** and what should be considered along the way. In order to cover as wide a user group as possible, it does not or to a little extent address the issue of how to do things. Therefore, no implementable information is given for particular industries, companies, or manufacturers.

In December 2005, the ITIL based ISO/IEC 20000 industry standard for IT service management was published. IT organizations can apply for ISO/IEC 20000 certification and prove their conformity.

The continuing boom caused demand for IT service management tools, which could represent the ITIL-based processes. So far, only proprietary solutions existed. Because of their considerable complexity, most of these tools are only affordable for large companies and effective in large IT departments.

The development of OTRS::ITSM was started as a result of the great success of the OTRS framework in order to combine the globally accepted, public ITIL recommendations with the benefits of open-source software.

OTRS::ITSM was the first real-world ITIL compliant IT service management solution on open-source basis, built on the solid basis of OTRS with its over thousands known OTRS installations and its community.

OTRS::ITSM is practically-oriented. This was accomplished by developing it in collaboration with ITIL consultants and with some of OTRS Groups' customers.

The service-desk and ticket system solution OTRS is the basis for the ITIL compliant IT service management solution OTRS::ITSM, its incident management, problem management, service level management, change and configuration management modules, and integrated CMDB.

Just like ITIL, OTRS::ITSM does not claim to be an *out-of-the-box* solution for all tasks and questions arising in IT service management. It is, in fact, supposed to serve as a flexible, stable and easy to understand information platform that can be adapted to meet the requirements of virtually every organization.

Therefore, please excuse us for bringing the following to your attention: The use of an ITIL aligned tool such as OTRS::ITSM only makes sense if processes, people, and products (IT services) are truly ITIL aligned.

Without the thoughtful tailoring of generic ITIL processes to meet the requirements of the specific business scenario, OTRS::ITSM will not achieve a discernible improvement of the key performance indicators of IT service management.

You should also be aware of the fact that successful ITIL implementation projects typically take up to a year and longer. Their scope and impact on the organization is not to be underestimated. However, we would like to mention that a neatly implemented ITIL aligned ITSM tool can help to save time and money, as the process support of the tool aids and accelerates the process of organizational realignment.

Note: The implementation of OTRS::ITSM is based on ITIL v3.

OTRS::ITSM supports the following features and processes, which are usually designed during the first phase of an ITIL implementation:

- Incident Management
- Problem Management
- Service Level Management
- Change Management
- Configuration Management Database

A more detailed description of use and adaptation of the system can be found in the following sections. Please note that the each OTRS::ITSM package can be installed independently and that their names correspond to their respective ITIL topics.

Note: The ITSM packages are installed into **OTRS** by the *Customer Solution Team*. In case of *On-Premise* systems, the customer can install the packages from the package manager, when the *Customer Solution Team* added the selected packages to the repository. To install a package, please contact the *Customer Solution Team* via support@otrs.com or in the OTRS Portal.

CHAPTER 2

General Catalog

As the name indicates, the general catalog serves for basic ITSM relevant configurations in OTRS::ITSM.

2.1 Administrator Interface

This chapter describes the new features that are available in the administrator interface after installation of the package.

2.1.1 Administration

After installation of the package a new module will be available in the administrator interface.

2.1.1.1 General Catalog

Use this screen to add catalog classes and items to the system. If only this package is installed to the system without any OTRS::ITSM packages, then the general catalog contains no entries. Install other OTRS::ITSM packages (e.g. *ITSM Core*) to add some classes and items to the catalog. The general catalog management screen is available in the *General Catalog* module of the *Administration* group.

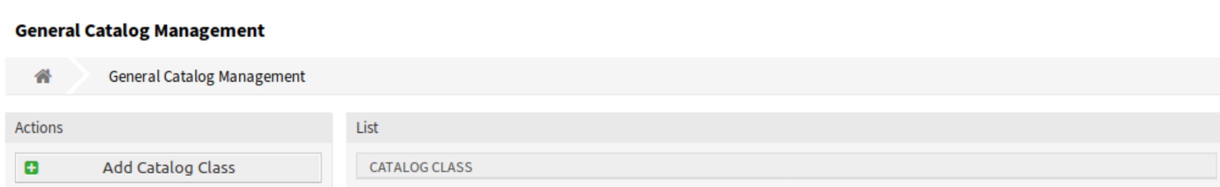


Fig. 1: General Catalog Management Screen

Manage General Catalog

To add a catalog class:

1. Click on the *Add Catalog Class* button in the left sidebar.
2. Fill in the required fields.
3. Click on the *Save* button.

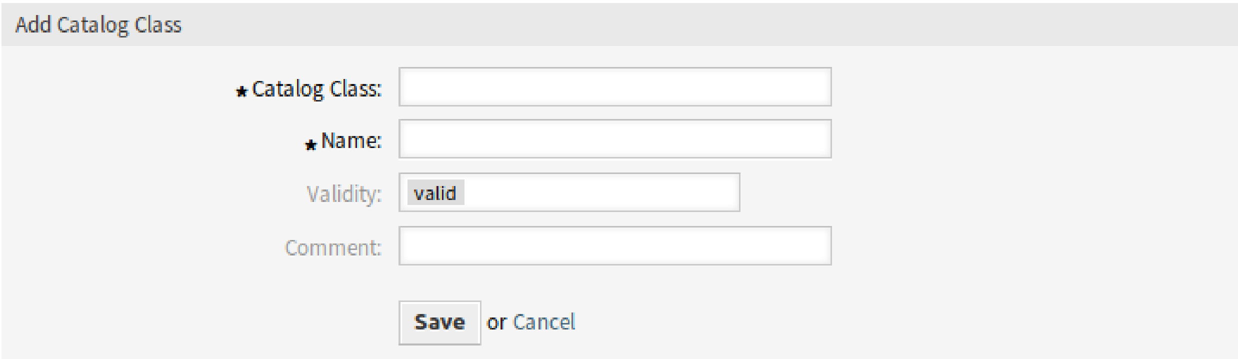


Fig. 2: Add Catalog Class Screen

> **Warning:** Catalog classes can not be deleted from the system. They can only be deactivated by setting the *Validity* option to *invalid* or *invalid-temporarily*.

> **Warning:** The maximum number of 20 *valid* catalog classes should not be exceeded. Exceeding this limit may affect the system performance.

To add a catalog item:

1. Select a catalog class in the list of catalog classes.
2. Click on the *Add Catalog Item* button in the left sidebar.
3. Fill in the required fields.
4. Click on the *Save* button.

> **Warning:** Catalog items can not be deleted from the system. They can only be deactivated by setting the *Validity* option to *invalid* or *invalid-temporarily*.

To edit a catalog item:

1. Select a catalog class in the list of catalog classes.
2. Select a catalog item in the list of catalog items.
3. Modify the fields.
4. Click on the *Save* or *Save and finish* button.

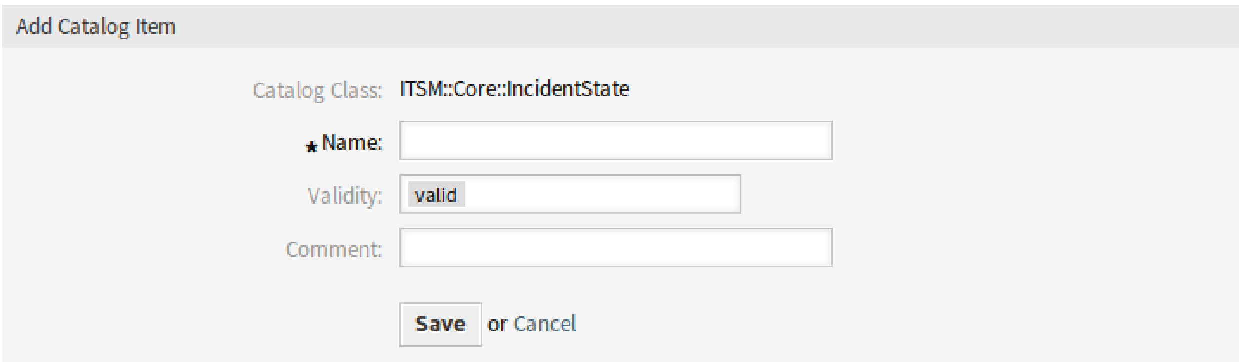


Fig. 3: Add Catalog Item Screen

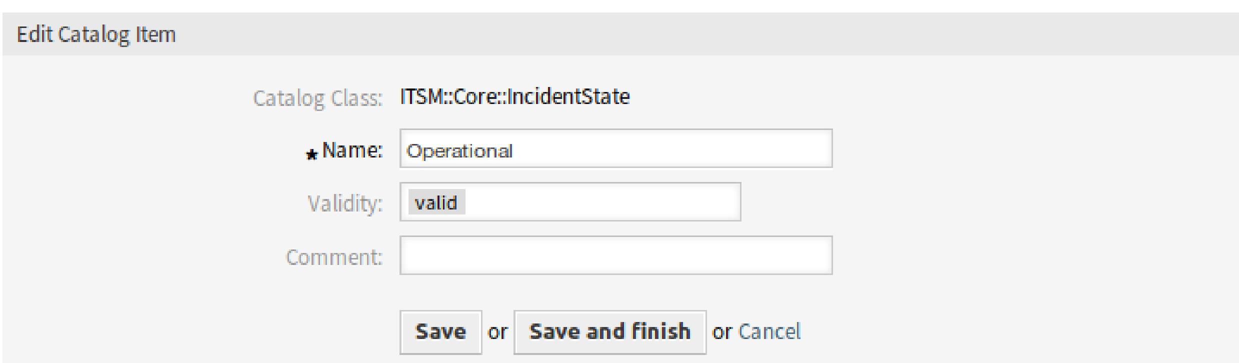


Fig. 4: Edit Catalog Item Screen

Catalog Class Settings

The following settings are available when adding this resource. The fields marked with an asterisk are mandatory.

Catalog Class * The name of the catalog class. The catalog class will be displayed in the overview table of catalog classes.

Name * The name of the catalog item to be added to the class. Any type of characters can be entered to this field including uppercase letters and spaces. The name will be displayed in the overview table of catalog items.

Validity * Set the validity of this resource. Each resource can be used in OTRS only, if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the resource.

Comment Add additional information to this resource. It is recommended to always fill this field as a description of the resource with a full sentence for better clarity.

Catalog Item Settings

The following settings are available when adding this resource. The fields marked with an asterisk are mandatory.

Catalog Class The name of the catalog class. This is read only in this screen.

Name * The name of the catalog item to be added to the class. Any type of characters can be entered to this field including uppercase letters and spaces. The name will be displayed in the overview table of catalog items.

Validity * Set the validity of this resource. Each resource can be used in OTRS only, if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the resource.

Comment Add additional information to this resource. It is recommended to always fill this field as a description of the resource with a full sentence for better clarity.

2.2 Agent Interface

This package has no agent interface.

2.3 External Interface

This package has no external interface.

CHAPTER 3

ITSM Core

This package adds new objects and basic functionalities needed for common features and processes of ITIL implementation.

Note: This package requires the *General Catalog* feature.

3.1 Administrator Interface

This chapter describes the new features that are available in the administrator interface after installation of the package.

3.1.1 Ticket Settings

After installation of the package a new module will be available in the administrator interface. Furthermore, *Service Level Agreements* and *Services* screens are extended with some new fields.

3.1.1.1 Criticality   Impact   Priority

Use this screen to manage the criticality   impact   priority matrix. The management screen is available in the *Criticality   Impact   Priority* module of the *Ticket Settings* group.

3.1.1.2 Service Level Agreements

The service level agreement management screen is available in the *Service Level Agreements* module of the *Ticket Settings* group.

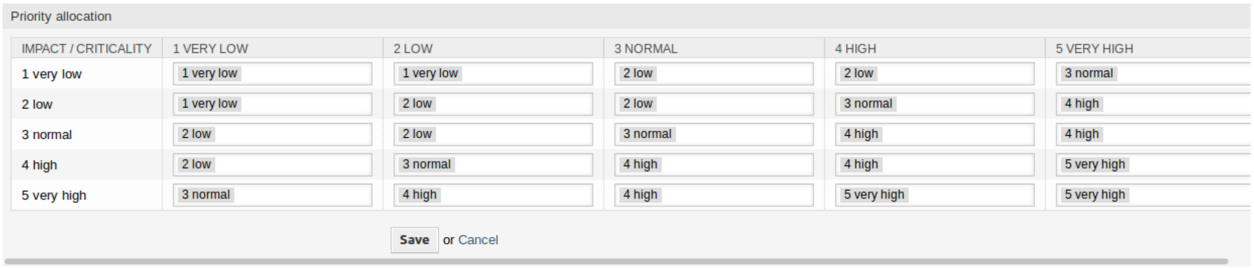


Fig. 1: Criticality Impact Priority Screen

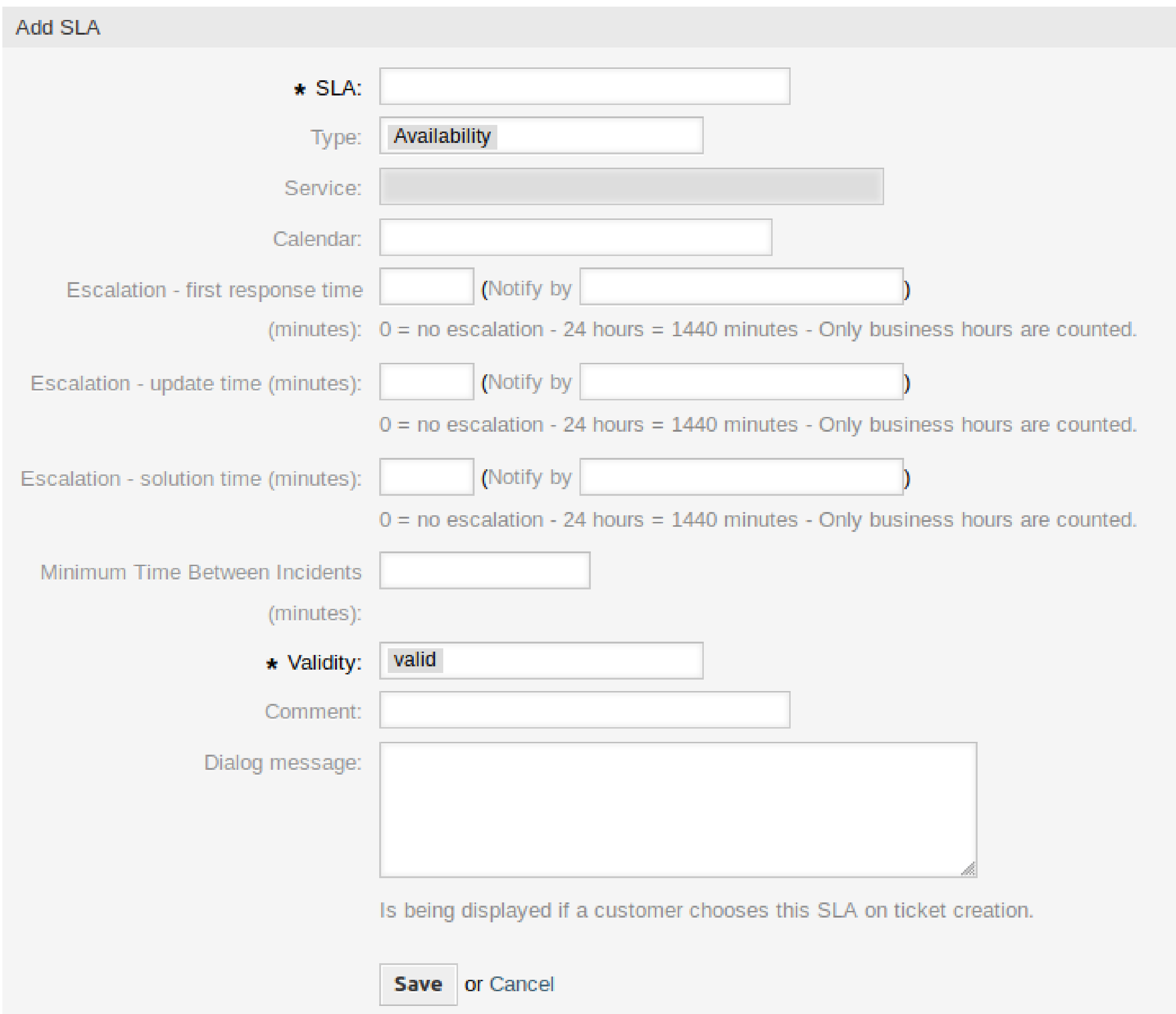


Fig. 2: Add Service Level Agreement Screen

Service Level Agreement Settings

Only those settings are described here, that are added by the package. The explanation of other settings can be found in the administrator manual. The fields marked with an asterisk are mandatory.

Type Select a type for the service level agreement. The possible values come from *General Catalog* added by the package.

Minimum Time Between Incidents (minutes) You can define here the minimum time between incidents.

3.1.1.3 Services

The service management screen is available in the *Services* module of the *Ticket Settings* group.

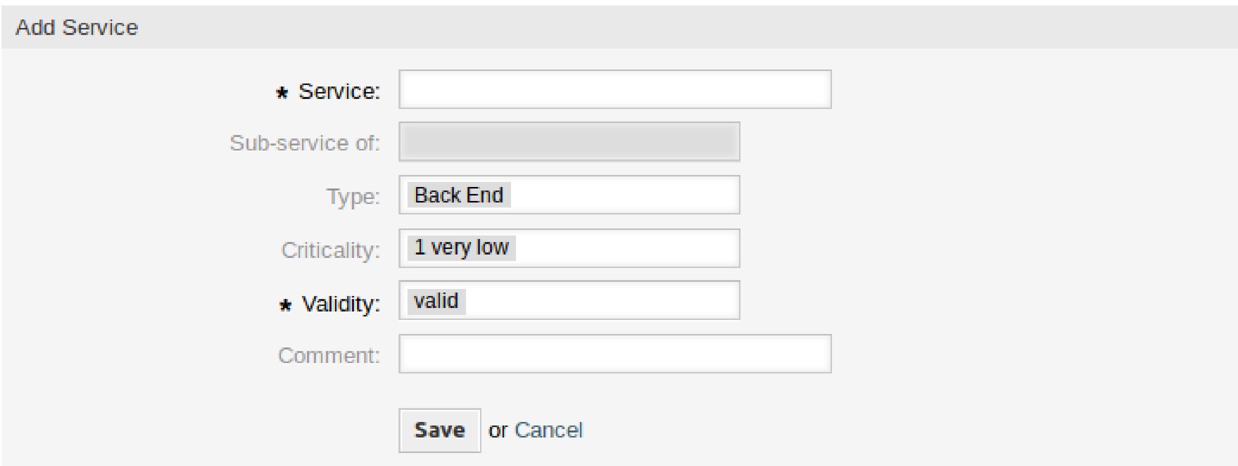


Fig. 3: Add Service Screen

Service Settings

Only those settings are described here, that are added by the package. The explanation of other settings can be found in the administrator manual. The fields marked with an asterisk are mandatory.

Type Select a type for the service. The possible values come from *General Catalog* added by the package.

Criticality Select a criticality for the service. The possible values come from *General Catalog* added by the package.

3.1.2 Users, Groups & Roles

After installation of the package a new group is added to the system.

3.1.2.1 Groups

After installation of the package a new group is added to the system. The group management screen is available in the *Groups* module of the *Users, Groups & Roles* group.

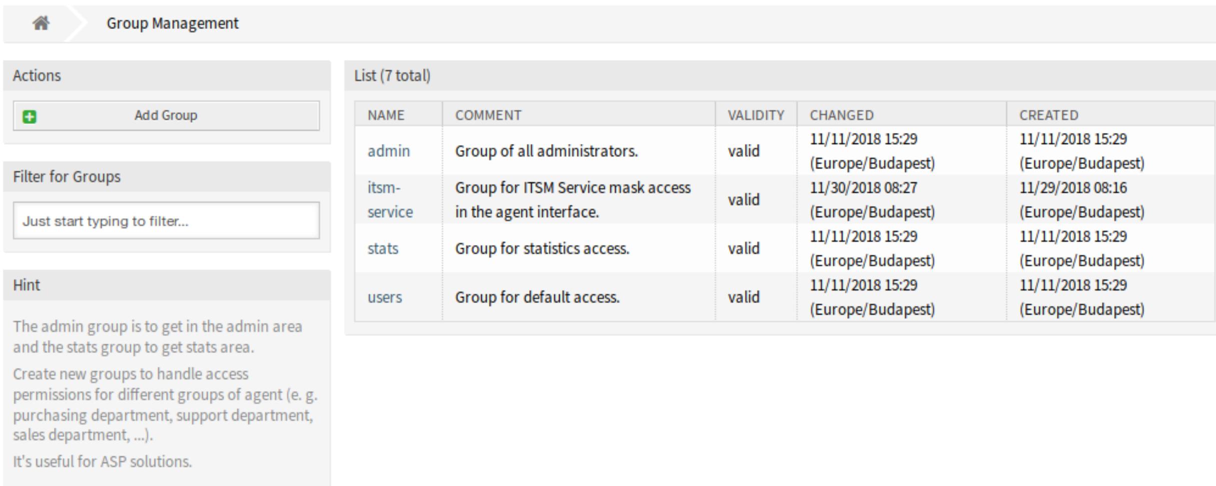


Fig. 4: Group Management Screen

New Group

After installation of the package the following group is added to the system:

itsm-service Group for accessing the *ITSM Service* screen of the agent interface.

Note: The primary administrator user (root@localhost) is added to the group with permission *rw* by default.

See also:

To set the correct permissions for other users, check the following relations:

- *Agents Groups*
- *Customers Groups*
- *Customer Users Groups*
- *Roles Groups*

3.1.3 Processes & Automation

After installation of the package some new dynamic fields are added to the system and activated on screens.

3.1.3.1 Dynamic Fields

After installation of the package some new dynamic fields are added to the system. The dynamic field management screen is available in the *Dynamic Fields* module of the *Processes & Automation* group.

New Dynamic Fields

`ITSMCriticality` This is a drop-down dynamic field that contains criticality levels from *1 very low* to *5 very high*.

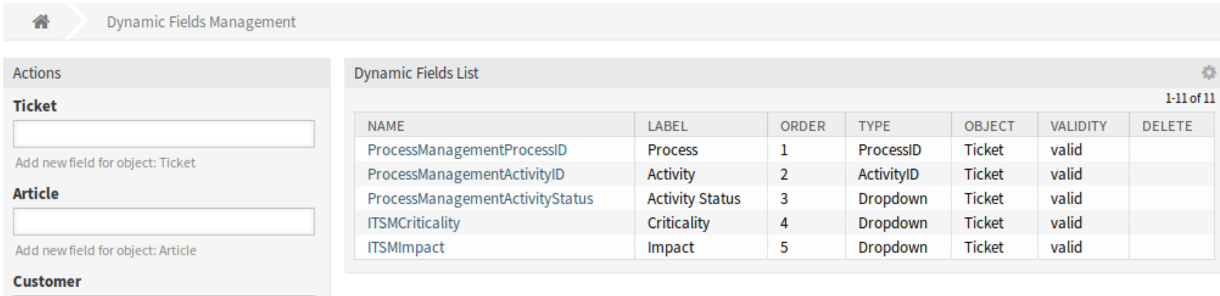


Fig. 5: Dynamic Field Management Screen

`ITSMImpact` This is a drop-down dynamic field that contains impact levels from *1 very low* to *5 very high*.

3.1.4 Administration

After installation of the package some new classes will be available in the *General Catalog*.

3.1.4.1 General Catalog

ITSM Core adds some new classes to the *General Catalog*. The general catalog management screen is available in the *General Catalog* module of the *Administration* group.

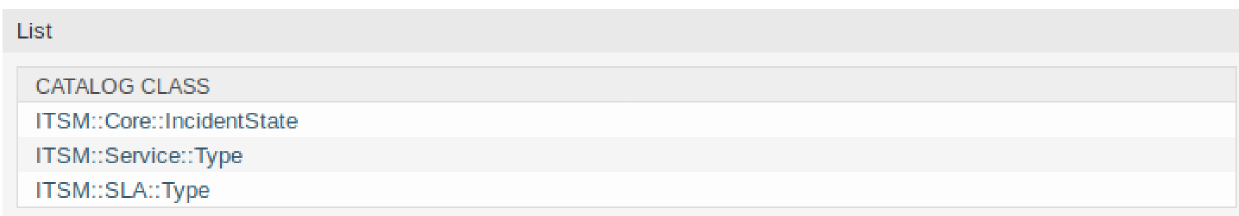


Fig. 6: General Catalog Class List Screen

New Classes

ITSM::Core::IncidentState This class contains incident states.

ITSM::Service::Type This class contains service types.

ITSM::SLA::Type This class contains service level agreement types.

3.2 Agent Interface

This chapter describes the new features that are available in the agent interface after installation of the package.

3.2.1 Tickets

After installation of the package some new fields will be available in the ticket screens.

3.2.1.1 New Email Ticket

After installation of the package some new fields will be available in the *New Email Ticket* screen.

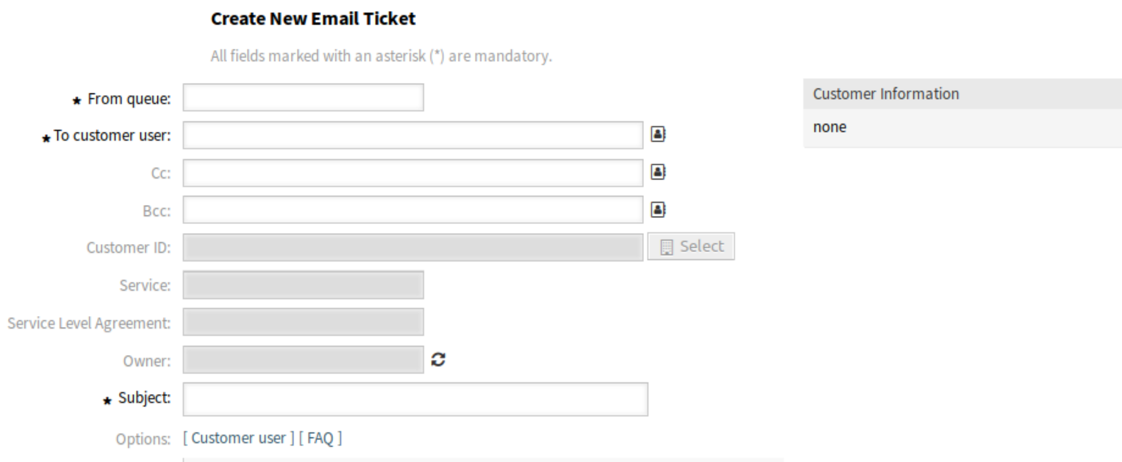


Fig. 7: New Email Ticket Screen

New Fields

Service Select a service for the new ticket.

Service Level Agreement Select a service level agreement for the new ticket.

See also:

To make these fields mandatory, enable these system configuration settings:

- `Ticket::Frontend::AgentTicketEmail###ServiceMandatory`
- `Ticket::Frontend::AgentTicketEmail###SLAMandatory`

3.2.1.2 New Phone Ticket

After installation of the package some new fields will be available in the *New Phone Ticket* screen.

New Fields

Service Select a service for the new ticket.

Service Level Agreement Select a service level agreement for the new ticket.

See also:

To make these fields mandatory, enable these system configuration settings:

- `Ticket::Frontend::AgentTicketPhone###ServiceMandatory`
- `Ticket::Frontend::AgentTicketPhone###SLAMandatory`

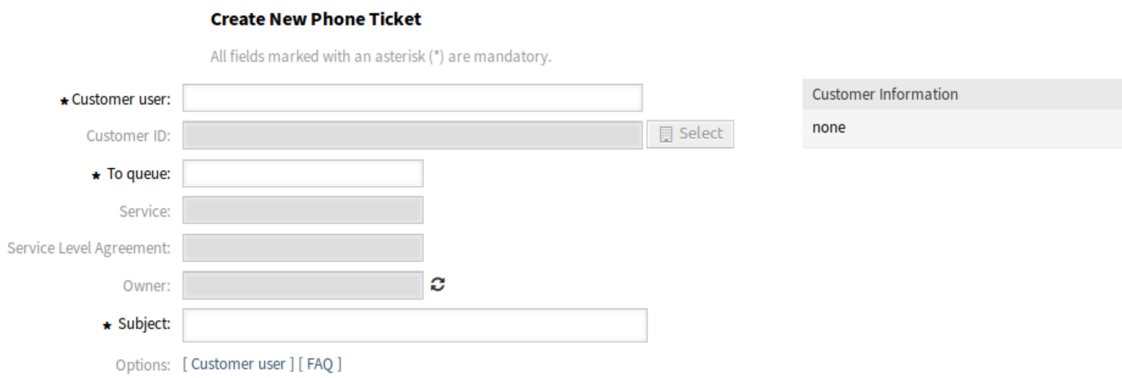


Fig. 8: New Phone Ticket Screen

3.2.1.3 Ticket Zoom

After installation of the package some new fields will be available in the *Free Fields* window of *Ticket Zoom* screen.

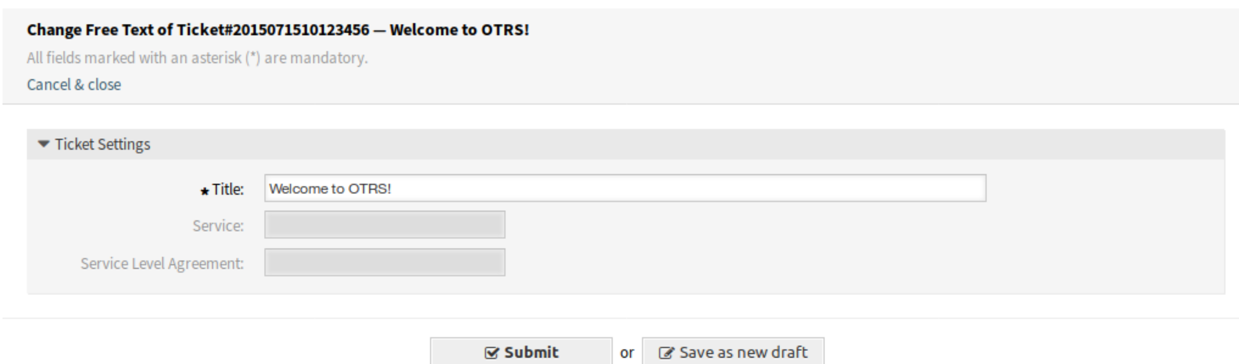


Fig. 9: Free Fields Window

New Fields

Service Select a service for the new ticket.

Service Level Agreement Select a service level agreement for the new ticket.

See also:

To make these fields mandatory, enable these system configuration settings:

- `Ticket::Frontend::AgentTicketFreeText###ServiceMandatory`
- `Ticket::Frontend::AgentTicketFreeText###SLAMandatory`

3.2.2 Services

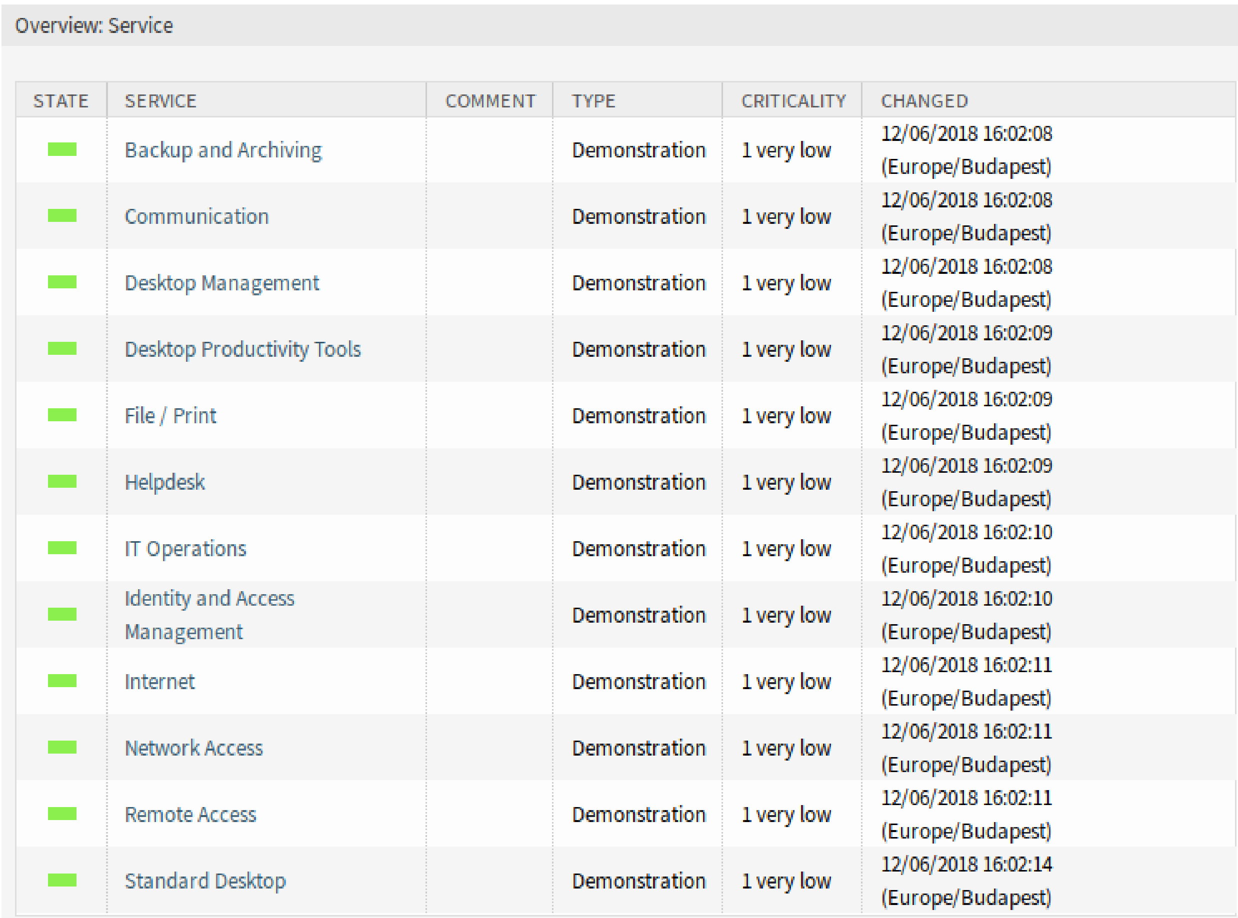
After installation of the package a new menu will be available in the agent interface.

Note: In order to grant users access to the *Services* menu, you need to add them as member to the group *itsm-service*.

The menu items that were added by this package will be visible after you log-in to the system again.

3.2.2.1 Service

Use this screen to get a list of services directly in the agent interface. The *Service* menu item is available in the *Services* menu of the main navigation bar.



Overview: Service

STATE	SERVICE	COMMENT	TYPE	CRITICALITY	CHANGED
	Backup and Archiving		Demonstration	1 very low	12/06/2018 16:02:08 (Europe/Budapest)
	Communication		Demonstration	1 very low	12/06/2018 16:02:08 (Europe/Budapest)
	Desktop Management		Demonstration	1 very low	12/06/2018 16:02:08 (Europe/Budapest)
	Desktop Productivity Tools		Demonstration	1 very low	12/06/2018 16:02:09 (Europe/Budapest)
	File / Print		Demonstration	1 very low	12/06/2018 16:02:09 (Europe/Budapest)
	Helpdesk		Demonstration	1 very low	12/06/2018 16:02:09 (Europe/Budapest)
	IT Operations		Demonstration	1 very low	12/06/2018 16:02:10 (Europe/Budapest)
	Identity and Access Management		Demonstration	1 very low	12/06/2018 16:02:10 (Europe/Budapest)
	Internet		Demonstration	1 very low	12/06/2018 16:02:11 (Europe/Budapest)
	Network Access		Demonstration	1 very low	12/06/2018 16:02:11 (Europe/Budapest)
	Remote Access		Demonstration	1 very low	12/06/2018 16:02:11 (Europe/Budapest)
	Standard Desktop		Demonstration	1 very low	12/06/2018 16:02:14 (Europe/Budapest)

Fig. 10: Service Overview Screen

A view on services and configuration items, including information on each object's current state, allows you to analyze an incident and calculate the incident's impact on affected services and customers, and service level agreements and linked configuration items are also displayed. For each configuration item, the current incident state is shown. In addition, the incident state will be propagated for dependent service level agreements and configuration items. If a service is selected, the service details will be shown, now with the additional current incident *State*, which is calculated from the incident states of dependent services and configuration items.

Service states can have one of the following three values:

- Operational (green)

- Warning (yellow)
- Incident (red)

The propagation of the incident state will be carried out if configuration items are linked to other business objects. Linking the configuration items is a manual task. The following combination of linking is possible in a default installation:

First Business Object	Second Business Object	Source Link	Target Link
Configuration item	Configuration item	Alternative to	Alternative to
Configuration item	Configuration item	Connected to	Connected to
Configuration item	Configuration item	Depends on	Required for
Configuration item	Configuration item	Includes	Part of
Configuration item	Configuration item	Relevant to	Relevant to
Configuration item	Ticket	Alternative to	Alternative to
Configuration item	Ticket	Depends on	Required for
Configuration item	Ticket	Relevant to	Relevant to
Configuration item	Service	Alternative to	Alternative to
Configuration item	Service	Depends on	Required for
Configuration item	Service	Relevant to	Relevant to
Configuration item	FAQ article	Normal	Normal
Configuration item	FAQ article	Parent	Child
Configuration item	FAQ article	Relevant to	Relevant to
Service	FAQ article	Normal	Normal
Service	FAQ article	Parent	Child
Service	FAQ article	Relevant to	Relevant to

Source and target links can be swapped to link the business objects each other. Thanks to this mechanism, the linking can be started in any type of business object zoom screen via the *Link* menu item.

See also:

The linking possibilities can be extended in the system configuration.

By default, only *Depends on* linking has underlying logic. Here the following rules apply:

- If a configuration item is dependent on another configuration item, which is in the state *Incident*, the dependent configuration item gets the state *Warning*.
- If a service is dependent on configuration items, and one of these configuration items has a state *Incident*, the service will also get the state *Incident*.
- If a service is dependent on configuration items, and one of these configuration items has the state *Warning*, the service will also get the state *Warning*.
- If a service has sub-services, and one of these services has the state *Incident*, the parent service will get the state *Warning*.
- If a service has sub-services, and one of these services has the state *Warning*, the parent service will get the state *Warning*.

Any other link type does not affect the incident state of services.

The states of the respective services, sub-services, and configuration items will be shown in the view.

See also:

Read the chapter about configuration item *Overview* to setup the dynamic calculation of service states.

To see the details of a service:

1. Click on the row of a service.

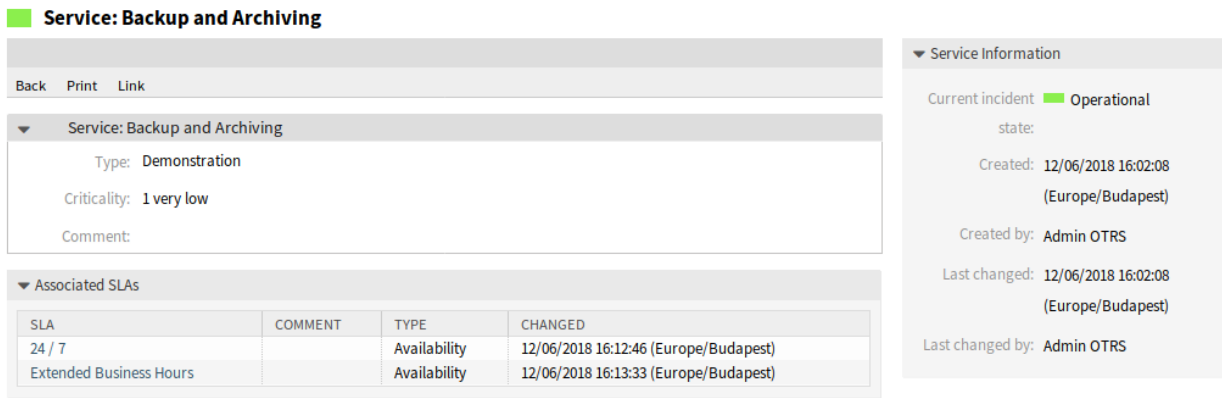


Fig. 11: Service Zoom Screen

The *Service Zoom* screen has an own menu.

Back This menu item goes back to the previous screen.

Print This menu item opens a PDF file to show the printer friendly version of the screen. You can save or print this PDF file.

Link This menu item opens the standard link screen of OTRS. Services can be linked to any other objects like FAQ articles, services, tickets or configuration items. Existing links can also be managed here.

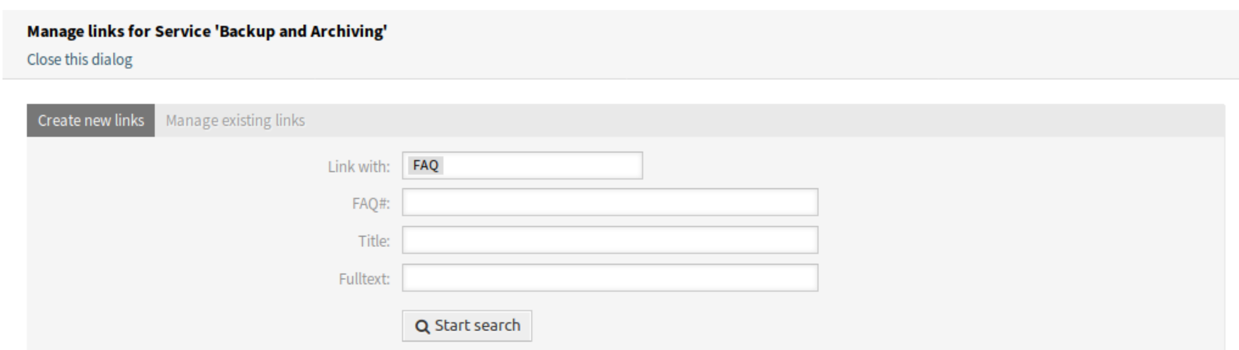


Fig. 12: Link Service Screen

At the bottom of the screen the associated service level agreements are displayed. If you click on a service level agreement, the *Service Level Agreements* zoom screen will open.

3.2.2.2 Service Level Agreements

Use this screen to get a list of service level agreements directly in the agent interface. The *SLA* menu item is available in the *Services* menu of the main navigation bar.

To see the details of a service level agreement:

1. Click on the row of a service level agreement.

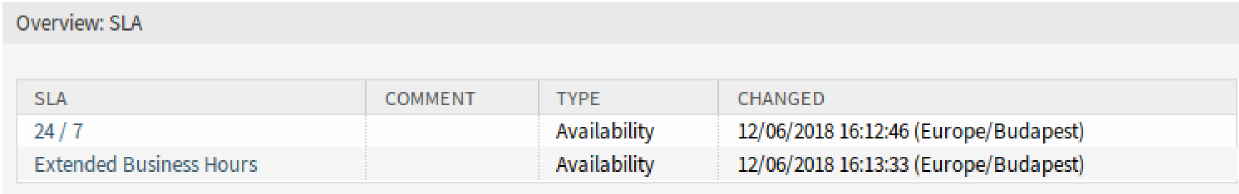


Fig. 13: SLA Overview Screen

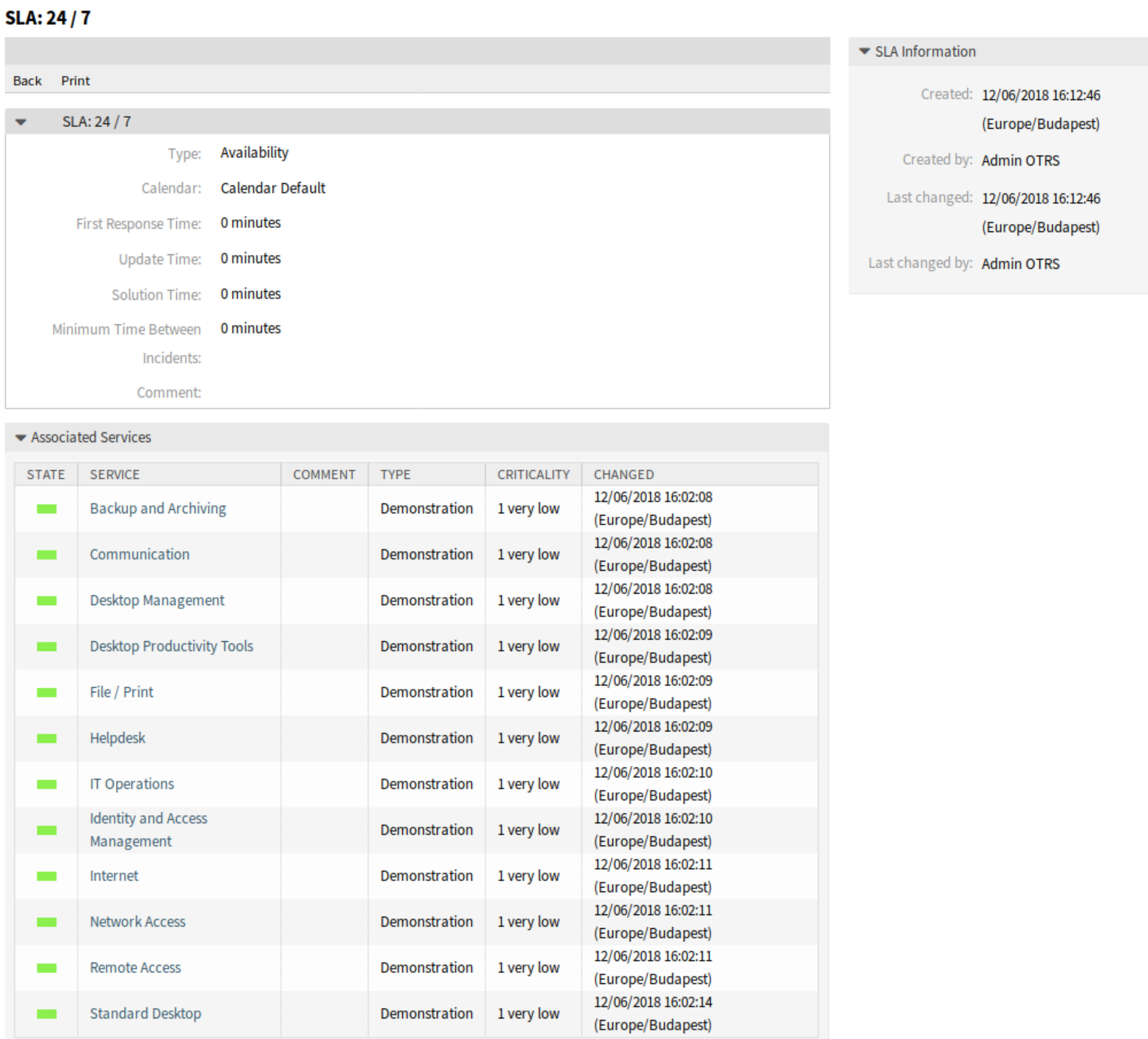


Fig. 14: Service Level Agreement Zoom Screen

The *Service Level Agreement Zoom* screen has an own menu.

Back This menu item goes back to the previous screen.

Print This menu item opens a PDF file to show the printer friendly version of the screen. You can save or print this PDF file.

At the bottom of the screen the associated services are displayed. If you click on a service, the *Service* zoom screen will open.

3.3 External Interface

This package has no external interface.

CHAPTER 4

ITSM Change Management

Change management, according to ITIL, is a service transition process whose purpose is to manage IT changes, including planning, documentation, and implementation upon approval and clearance. The objective is to minimize negative effects on the IT infrastructure, particularly on critical services, resulting from ad-hoc or poorly-managed changes or amendments.

The implementation of OTRS::ITSM requires significant technical specification and preparation. Prior to a technical implementation, key elements of the change management process, such as required workflows, metrics or reports, must be defined. The implementation in OTRS::ITSM defines a change as an alteration of the existing IT landscape, such as the installation of a new mail server.

As changes typically consist of several sub-tasks, OTRS::ITSM allows any number of sub-tasks to be defined per change. These are known as *work orders*.

Note: This package requires the *General Catalog* and the *ITSM Core* features.

4.1 Administrator Interface

This chapter describes the new features that are available in the administrator interface after installation of the package.

4.1.1 Ticket Settings

After installation of the package a new type *RfC* is added to ticket types.

4.1.1.1 Types

The type management screen is available in the *Types* module of the *Ticket Settings* group.

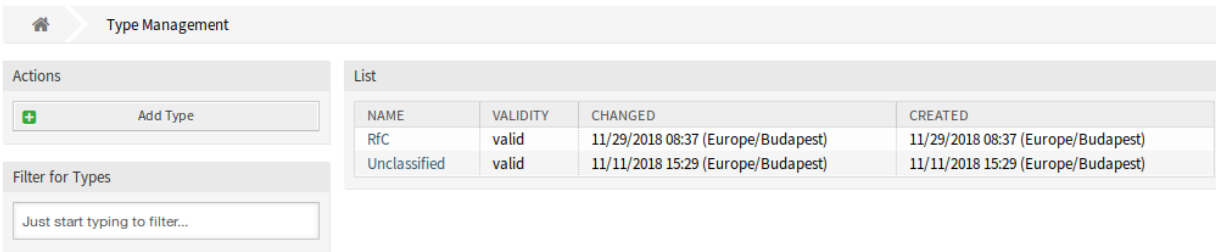


Fig. 1: Type Management Screen

New Type

RfC For tickets that are created for change requests.

4.1.2 Users, Groups & Roles

After installation of the package some new groups are added to the system.

4.1.2.1 Groups

Access to the change management module is managed on a role-based access concept. After installation of the package some new groups are added to the system. The group management screen is available in the *Groups* module of the *Users, Groups & Roles* group.

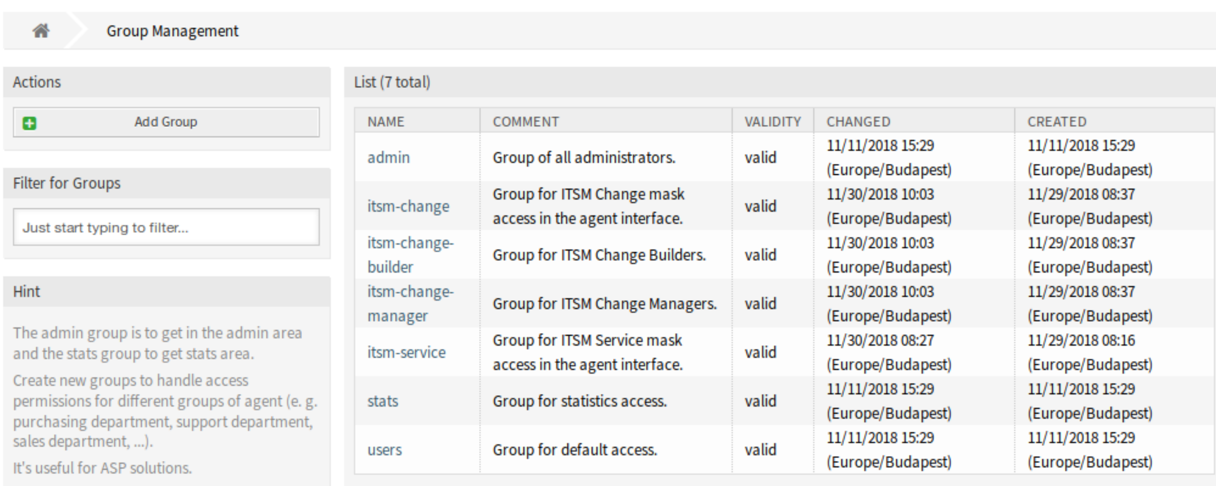


Fig. 2: Group Management Screen

New Groups

After installation of the package the following groups are added to the system:

itsm-change Members of this group have access to the change management module. All potential work order agents should be assigned to this group. All changes and work orders can be viewed by these users.

itsm-change-builder Members of this group can create new changes and work orders in the system. All changes and work orders can be viewed by this group. Changes and work orders created by the change builder, or that have been defined as accessible to the change builder, may be edited by these users.

itsm-change-manager Members of this group can create new changes and work orders in the system. All changes and work orders can be viewed by this group. These users can edit all changes and work orders.

Note: The primary administrator user (root@localhost) is added to all groups with permission *rw* by default.

See also:

To set the correct permissions for other users, check the following relations:

- *Agents Groups*
- *Customers Groups*
- *Customer Users Groups*
- *Roles Groups*

4.1.3 Communication & Notifications

After installation of the package a new module will be available to *Communication & Notifications* group in the administrator interface.

4.1.3.1 ITSM Change Notifications

Use this screen to add ITSM change notifications to the system. After installing the package several notifications are added to the system. The ITSM change notification management screen is available in the *ITSM Change Notifications* module of the *Communication & Notifications* group.

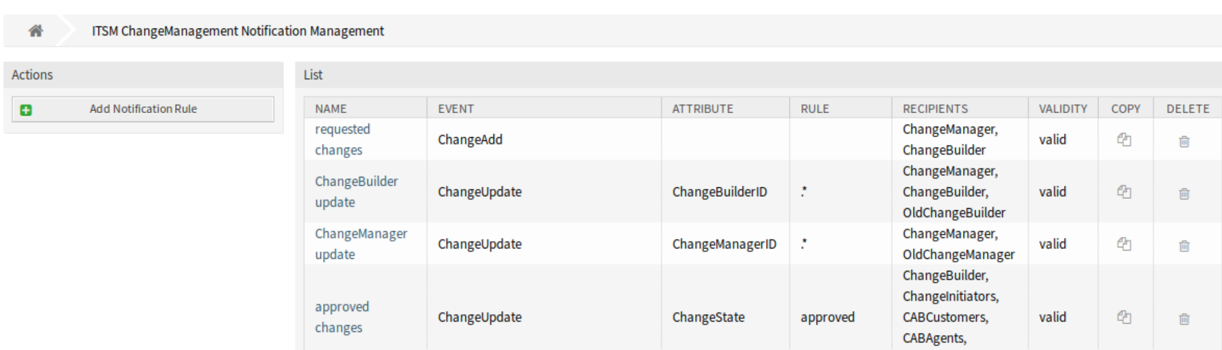


Fig. 3: ITSM Change Notification Management Screen

Manage ITSM Change Notifications

To add an ITSM change notification:

1. Click on the *Add Notification Rule* button in the left sidebar.
2. Fill in the required fields.
3. Click on the *Save* button.

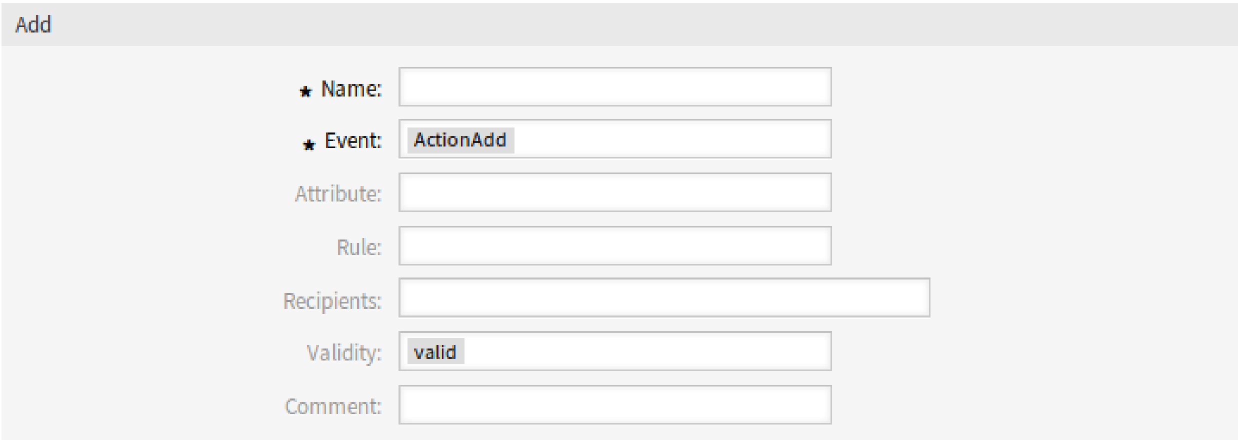


Fig. 4: Add ITSM Change Notification Screen

To edit an ITSM change notification:

1. Click on an ITSM change notification in the list of ITSM change notifications.
2. Modify the fields.
3. Click on the *Save* or *Save and finish* button.

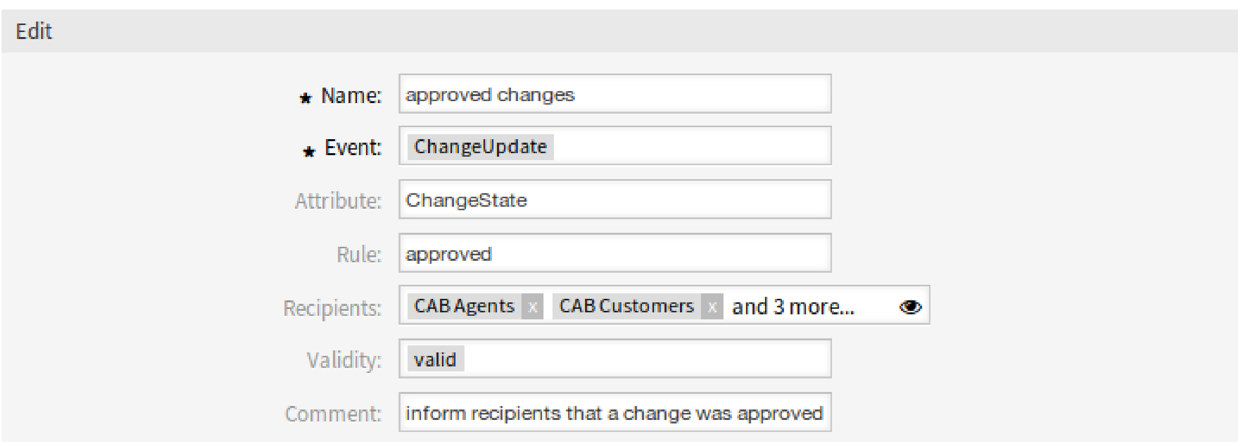
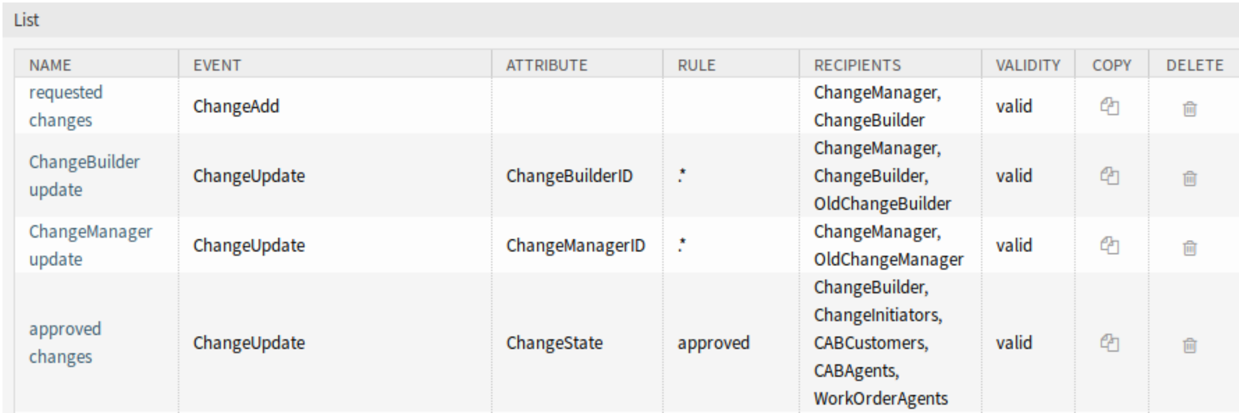


Fig. 5: Edit ITSM Change Notification Screen

To delete an ITSM change notification:

1. Click on the trash icon in the list of ITSM change notifications.
2. Click on the *OK* button.

To copy an ITSM change notification:



List

NAME	EVENT	ATTRIBUTE	RULE	RECIPIENTS	VALIDITY	COPY	DELETE
requested changes	ChangeAdd			ChangeManager, ChangeBuilder	valid		
ChangeBuilder update	ChangeUpdate	ChangeBuilderID	.*	ChangeManager, ChangeBuilder, OldChangeBuilder	valid		
ChangeManager update	ChangeUpdate	ChangeManagerID	.*	ChangeManager, OldChangeManager	valid		
approved changes	ChangeUpdate	ChangeState	approved	ChangeBuilder, ChangeInitiators, CABCustomers, CABAgents, WorkOrderAgents	valid		

Fig. 6: Delete ITSM Change Notification Screen

1. Click on the copy icon in the list of ITSM change notifications.

ITSM Change Notification Settings

The following settings are available when adding or editing this resource. The fields marked with an asterisk are mandatory.

Basic ITSM Change Notification Settings

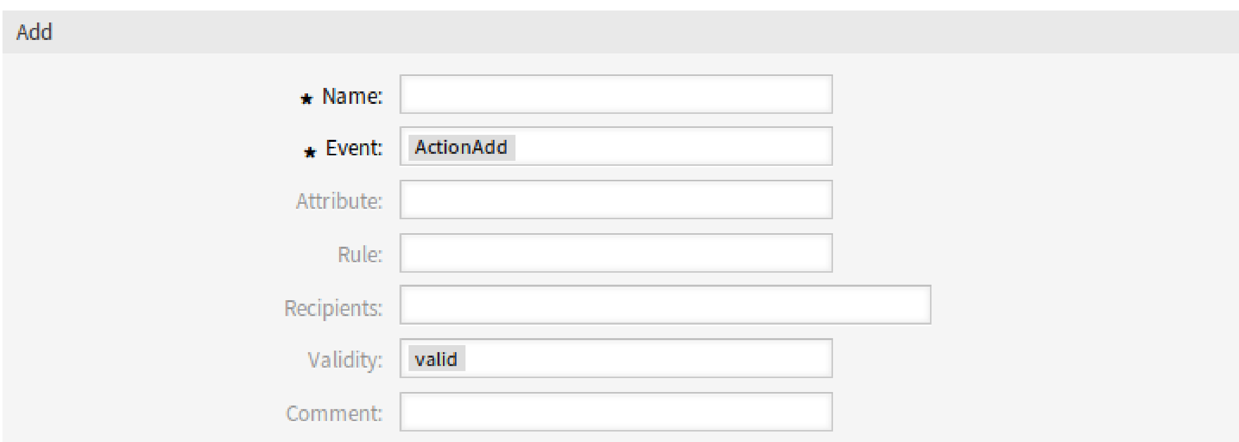


Fig. 7: ITSM Change Notification Settings - Basic

Name * The name of this resource. Any type of characters can be entered to this field including uppercase letters and spaces. The name will be displayed in the overview table.

Event * Here you can choose which events will trigger this notification.

Attribute The field, that should be listen for the notification.

Rule The content of the field, that are set as *Attribute*.

Recipients Here you can select the groups, that can receive the notification.

Validity * Set the validity of this resource. Each resource can be used in OTRS only, if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the resource.

Comment Add additional information to this resource. It is recommended to always fill this field as a description of the resource with a full sentence for better clarity, because the comment will be also displayed in the overview table.

Notification (Agent)

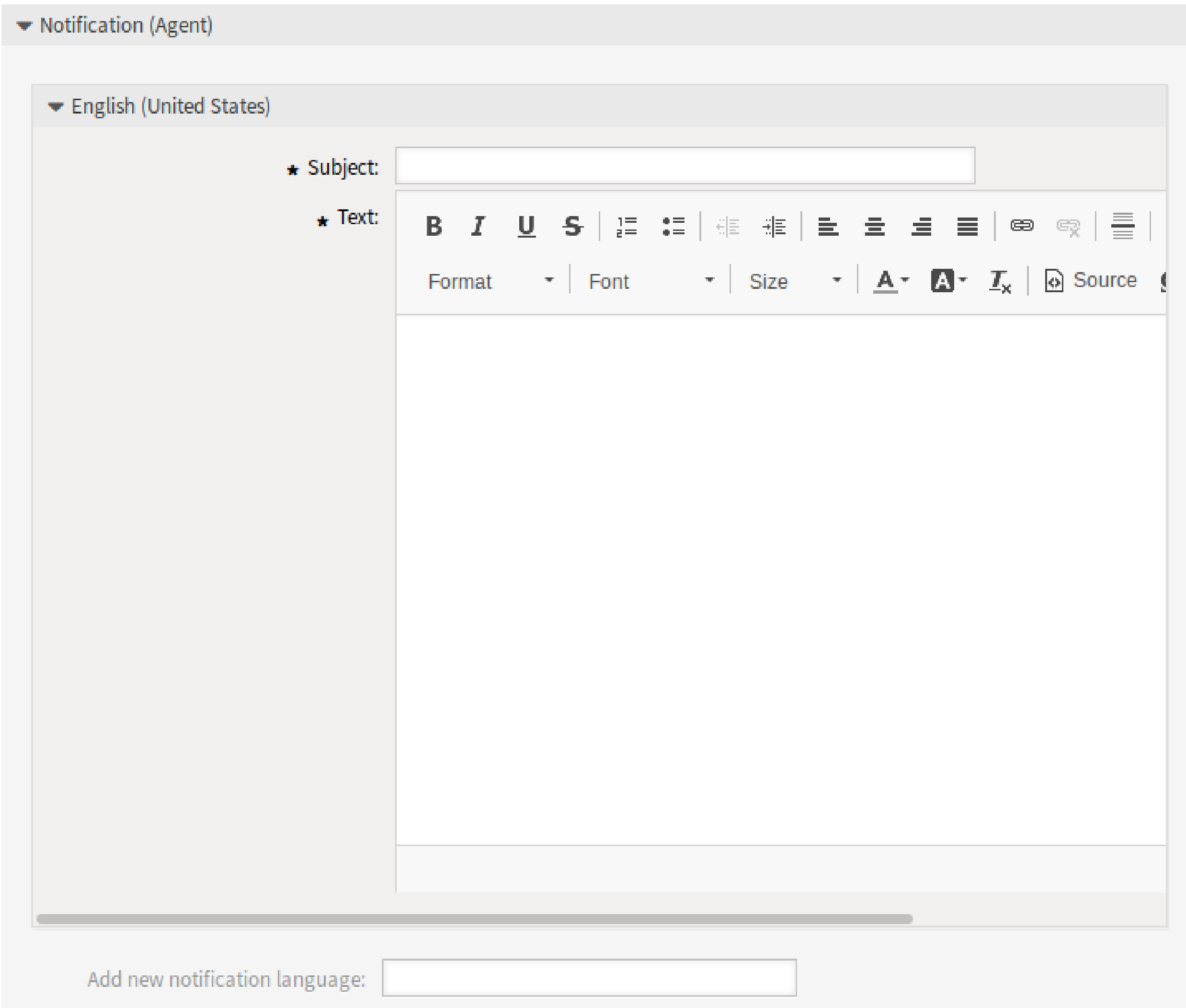


Fig. 8: ITSM Change Notification Settings - Notification for Agents

The main content of a notification can be added for each languages with localized subject and body text. It is also possible to define static text content mixed with OTRS smart tags.

Subject * The localized subject for a specific language.

Text * The localized body text for a specific language.

Add new notification language Select which languages should be added to create localized notifications.

Warning: Deleting a language in DefaultUsedLanguages setting that already has a notification text here will make the notification text unusable. If a language is not present or enabled on the system, the corresponding notification text could be deleted if it is not needed anymore.

Notification (Customer)

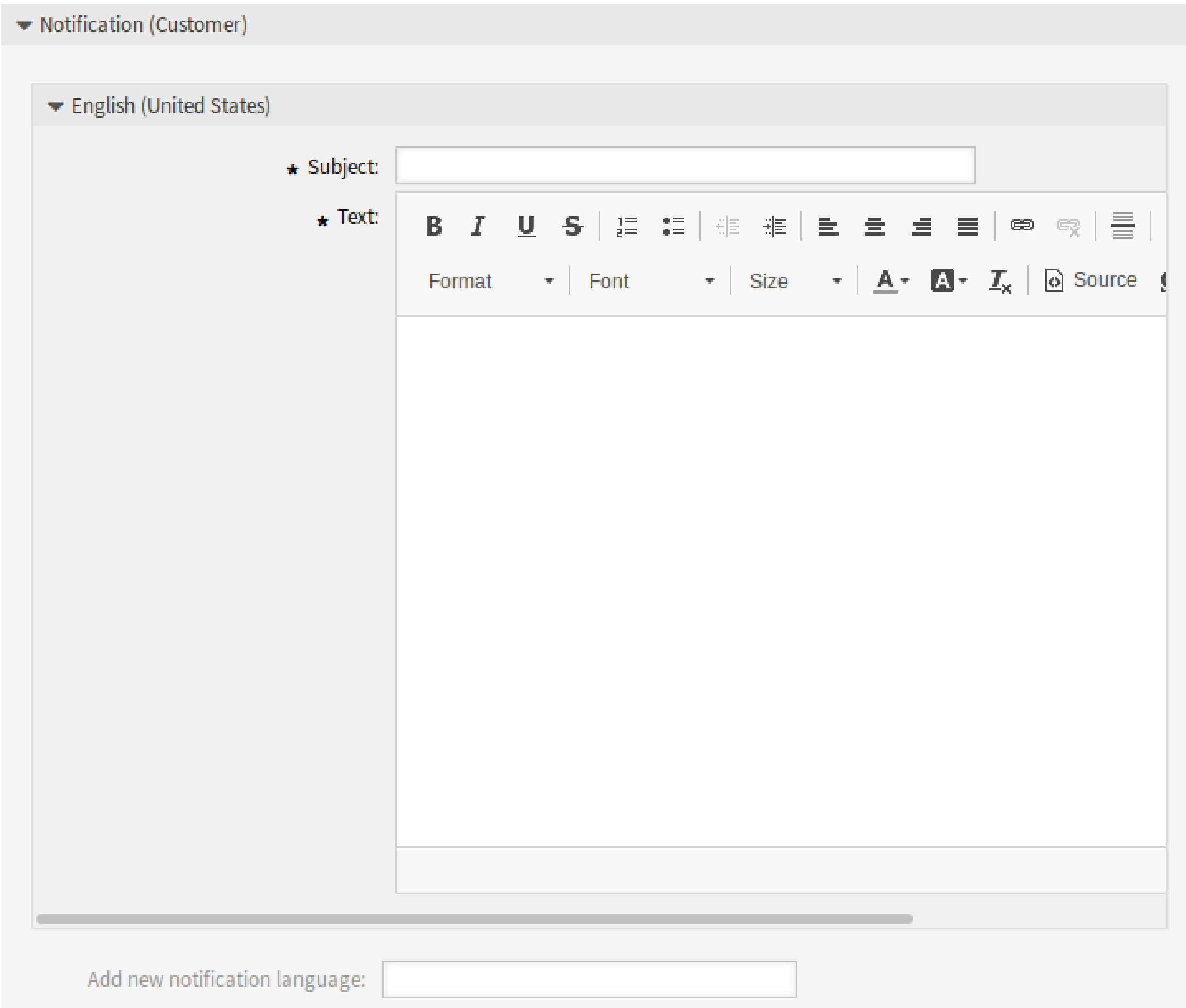


Fig. 9: ITSM Change Notification Settings - Notification for Customers

The main content of a notification can be added for each languages with localized subject and body text. It is also possible to define static text content mixed with OTRS smart tags.

Subject * The localized subject for a specific language.

Text * The localized body text for a specific language.

Add new notification language Select which languages should be added to create localized notifications.

> **Warning:** Deleting a language in DefaultUsedLanguages setting that already has a notification text here will make the notification text unusable. If a language is not present or enabled on the system, the corresponding notification text could be deleted if it is not needed anymore.

ITSM Change Notification Variables

Using variables in ticket notifications is possible. Variables, known as OTRS tags, are replaced by OTRS when generating the mail.

See also:

Please check the existing notifications for the list of OTRS tags, that can be used in ITSM change notifications.

For example, the variable `<OTRS_CHANGE_ChangeManager>` expands to the change manager allowing a template to include something like the following.

```
Change manager: <OTRS_CHANGE_ChangeManager>
```

This tag expands, for example to:

```
Change manager: John Smith
```

4.1.4 Administration

After installation of the package some new classes will be available in the *General Catalog*.

4.1.4.1 General Catalog

ITSM Change Management adds some new classes to the *General Catalog*. The general catalog management screen is available in the *General Catalog* module of the *Administration* group.

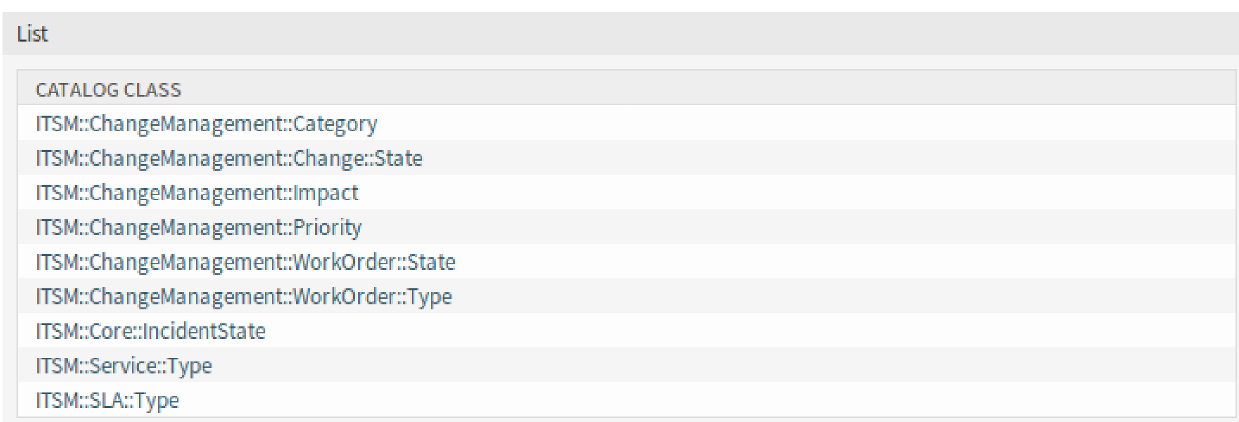


Fig. 10: General Catalog Class List Screen

New Classes

ITSM::ChangeManagement::Category This class contains the severity of categories used in the *Category Impact Priority* matrix.

ITSM::ChangeManagement::Change::State This class contains the change states used in the *State Machine*.

ITSM::ChangeManagement::Impact This class contains the severity of impacts used in the *Category Impact Priority* matrix.

ITSM::ChangeManagement::Priority This class contains the priorities used in the *Category Impact Priority* matrix.

ITSM::ChangeManagement::WorkOrder::State This class contains the work order states used in the *State Machine*.

ITSM::ChangeManagement::WorkOrder::Type This class contains the work order types used in *ITSM Changes*.

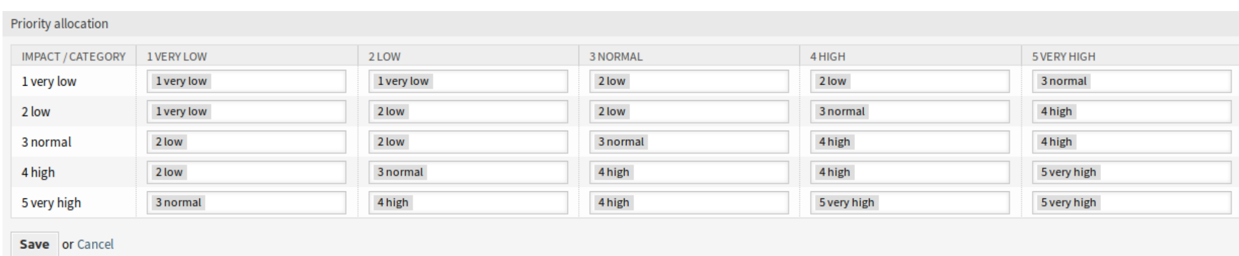
Note: The other classes was added by *ITSM Core* package.

4.1.5 Change Settings

After installation of the package a new group *Change Settings* will be available with two new modules in the administrator interface.

4.1.5.1 Category Impact Priority

Use this screen to manage the category impact priority matrix. The management screen is available in the *Category Impact Priority* module of the *Change Settings* group.



Priority allocation

IMPACT / CATEGORY	1 VERY LOW	2 LOW	3 NORMAL	4 HIGH	5 VERY HIGH
1 very low	1 very low	1 very low	2 low	2 low	3 normal
2 low	1 very low	2 low	2 low	3 normal	4 high
3 normal	2 low	2 low	3 normal	4 high	4 high
4 high	2 low	3 normal	4 high	4 high	5 very high
5 very high	3 normal	4 high	4 high	5 very high	5 very high

Save or Cancel

Fig. 11: Category Impact Priority Screen

This matrix defines the priority of a change based on the category and impact. The calculated priority will be used in *Add Change* and *Edit Change* screens.

4.1.5.2 State Machine

OTRS::ITSM features state machines which define valid statuses and possible result statuses for a change and for a work order.

Use this screen to manage the state machines. The state machine management screen is available in the *State Machine* module of the *Change Settings* group.

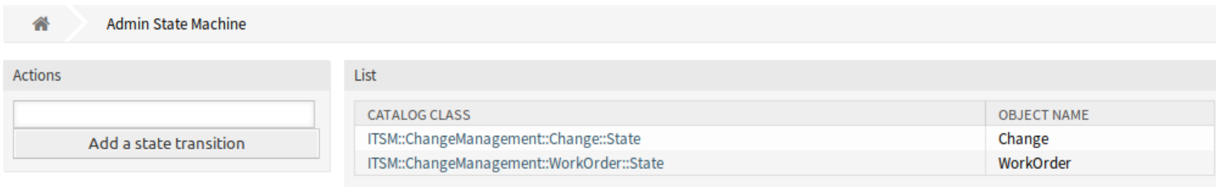


Fig. 12: State Machine Management Screen

Manage State Machines

The statuses and possible result statuses should be defined as *transitions*. In OTRS::ITSM, this is illustrated as a table.

To add a new transition:

1. Select the state machine to add the new transition to from the *Action* widget of the left sidebar.
2. Select a state from the transition should start.
3. Select a state to the transition should go.
4. Click on the *Save* or *Save and finish* button.

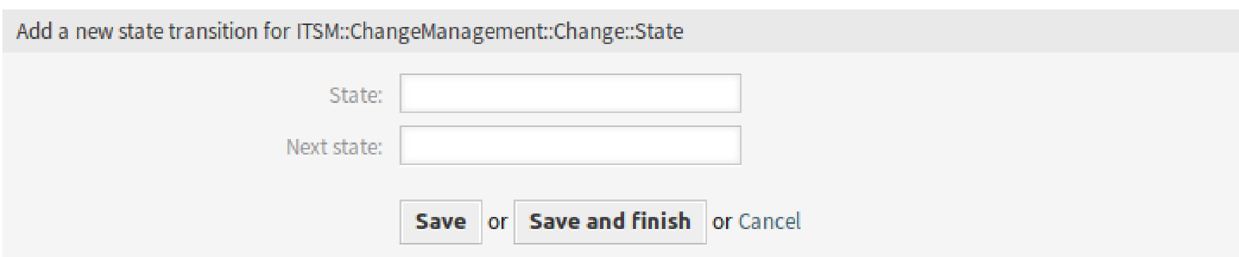


Fig. 13: Add New State Transition Screen

To edit a transition:

1. Click on a state machine in the list of state machines.
2. Click on a transition name.
3. Modify the *Next state*.
4. Click on the *Save* or *Save and finish* button.

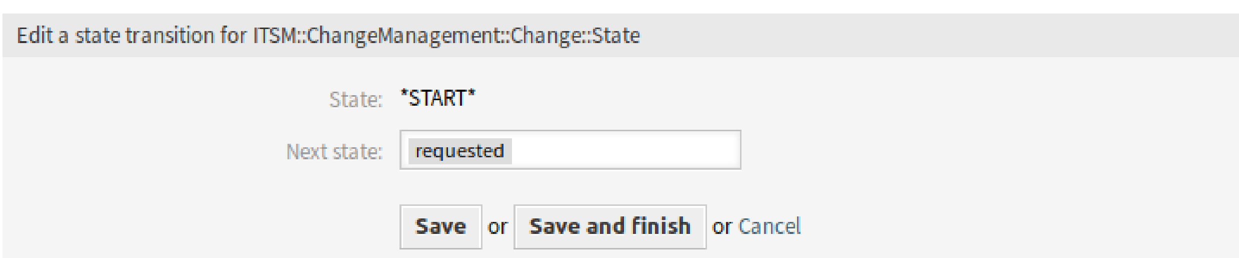


Fig. 14: Edit State Transition Screen

To delete a transition:

1. Click on a state machine in the list of state machines.
2. Click on the trash icon in the last column of transition table.
3. Click on the *Yes* button in the confirmation screen.

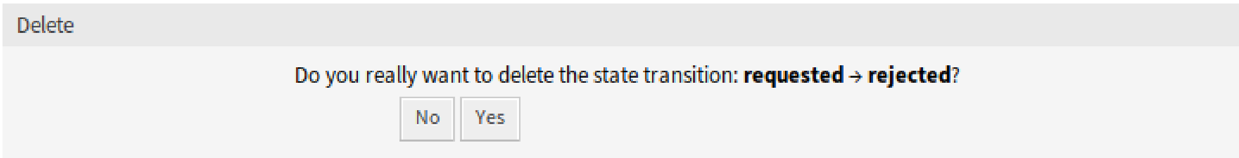


Fig. 15: Delete State Transition Screen

Change State Machine

The standard installation generates suggestions based on the following logic model.

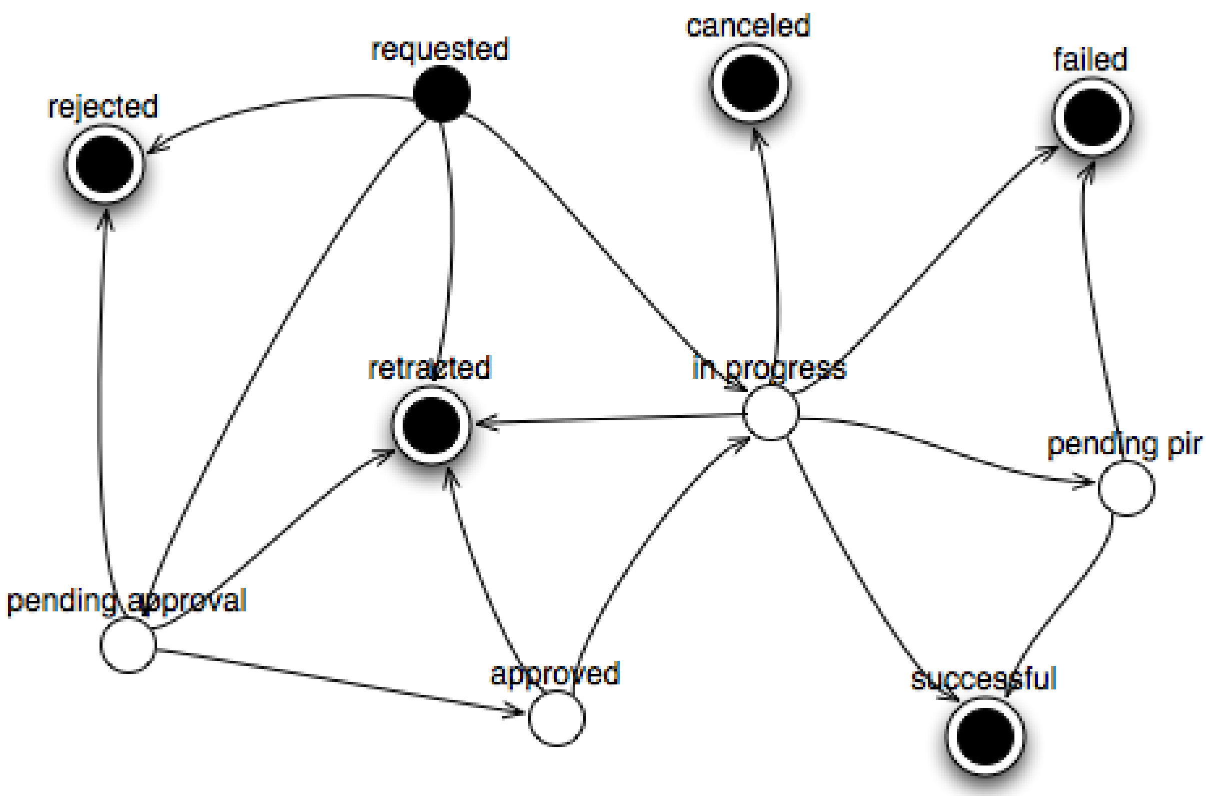


Fig. 16: Change State Machine Model

To see the state machine transitions, click on the *ITSM::ChangeManagement::Change::State* item in the list of state machines.

See also:

The states of the change state machine are defined in the *ITSM::ChangeManagement::Change::State* class in the *General Catalog*.

Overview over state transitions for ITSM::ChangeManagement::Change::State

STATE	NEXT STATE	DELETE
START	requested	
requested	rejected	
requested	retracted	
requested	pending approval	
requested	in progress	
pending approval	rejected	
pending approval	retracted	
pending approval	approved	
rejected	*END*	
approved	retracted	
approved	in progress	
in progress	pending pir	
in progress	retracted	
in progress	failed	
in progress	successful	
in progress	canceled	
pending pir	failed	
pending pir	successful	
successful	*END*	
failed	*END*	
canceled	*END*	
retracted	*END*	

Fig. 17: Change State Machine Transitions

Work Order State Machine

The standard installation generates suggestions based on the following logic model.

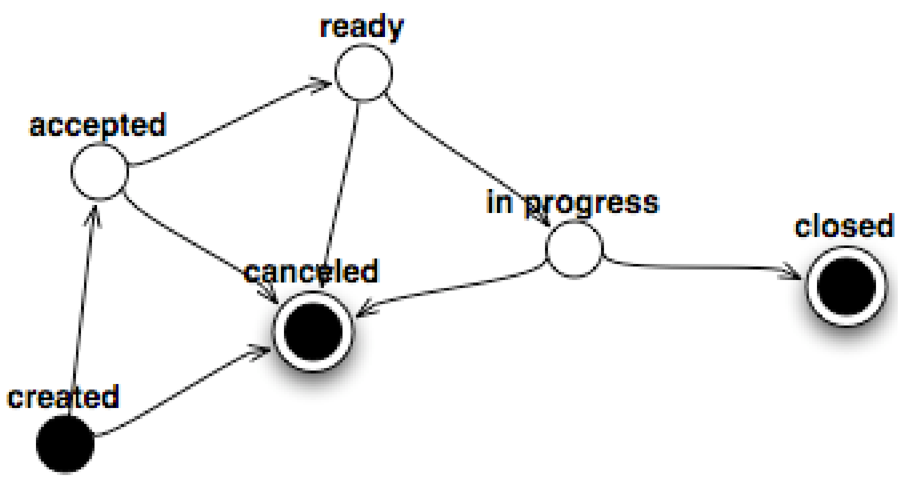


Fig. 18: Work Order State Machine Model

To see the state machine transitions, click on the *ITSM::ChangeManagement::WorkOrder::State* item in the list of state machines.

Overview over state transitions for ITSM::ChangeManagement::WorkOrder::State

STATE	NEXT STATE	DELETE
START	created	
created	accepted	
created	canceled	
accepted	ready	
accepted	canceled	
ready	in progress	
ready	canceled	
in progress	closed	
in progress	canceled	
closed	*END*	
canceled	*END*	

Fig. 19: Work Order State Machine Transitions

See also:

The states of the work order state machine are defined in the *ITSM::ChangeManagement::WorkOrder::State* class in the *General Catalog*.

4.2 Agent Interface

This chapter describes the new features that are available in the agent interface after installation of the package.

4.2.1 ITSM Changes

After installation of the package a new menu will be available in the agent interface.

Note: In order to grant users access to the *ITSM Changes* menu, you need to add them as member to the group *itsm-change*.

The menu items that were added by this package will be visible after you log-in to the system again.

The implementation of a change, including all required work orders, follows the underlying workflow shown below:

1. Creation of a change.
2. Creation of needed work orders.
3. Definition of conditions and actions.
4. Execution of a change.

4.2.1.1 Overview

This screen gives an overview of changes.

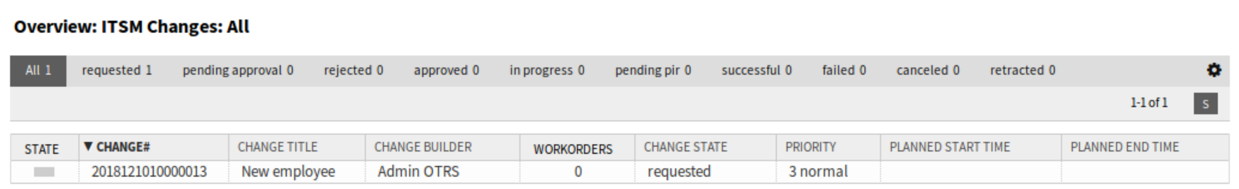


Fig. 20: ITSM Changes Overview Screen

Changes can be filtered by clicking on a state name in the header of the overview widget. There is an option *All* to see all changes. The numbers after the state names indicates how many changes are in each states.

See also:

See setting `ITSMChange::Frontend::AgentITSMChange###Filter::ChangeStates` to define the work order states that will be used as filters in the overview.

To limit the number of displayed changes per page:

1. Click on the gear icon in the top right corner of the overview header.
2. Select the maximum number of changes displayed per page.
3. Click on the *Submit* button.

The displayed attributes can be defined via the system configuration. Not all attributes are displayed by default. The possible attributes are:

`ActualEndTime` Date and time at which the change implementation was completed.

`ActualStartTime` Date and time at which the change implementation began.

`Category` Category or type of change.

`ChangeBuilder` Name of the change builder.

`ChangeManager` Name of the change manager.

`ChangeNumber` System generated change number.

`ChangeState` Change status.

`ChangeStateSignal` Change status indicator to be shown as traffic light.

`ChangeTime` Date and time at which the change was modified.

`ChangeTitle` Name of the change.

`CreateTime` Date and time at which the change was created.

`DynamicField_ChangeFieldName` Dynamic field that is associated to the work order.

`Impact` Expected effect of the change.

`PlannedEndTime` Projected change implementation completion date and time.

`PlannedStartTime` Planned change implementation start date and time.

`Priority` Priority level of the change.

`RequestedTime` Customer's desired implementation date.

`Services` Services affected by the change.

`WorkOrderCount` Number of work orders related to the change.

See also:

See setting `ITSMChange::Frontend::AgentITSMChange###ShowColumns` to define the displayed attributes.

To see the details of a change:

1. Click on the row of a change.

The *Change Zoom* screen has an own menu.

Back This menu item goes back to the previous screen.

History This menu item opens a new window to see the history of the change.

Print This menu item opens a PDF file to show the printer friendly version of the screen. You can save or print this PDF file.

Edit This menu item opens a new window to edit the change.

Involved Persons Use this screen to add persons to the change.

Change Manager * Assigns change manager privileges to an agent for the current change.

> **Note:** Only those agent can be added as change manager, who is member of group *itsm-change-manager*.

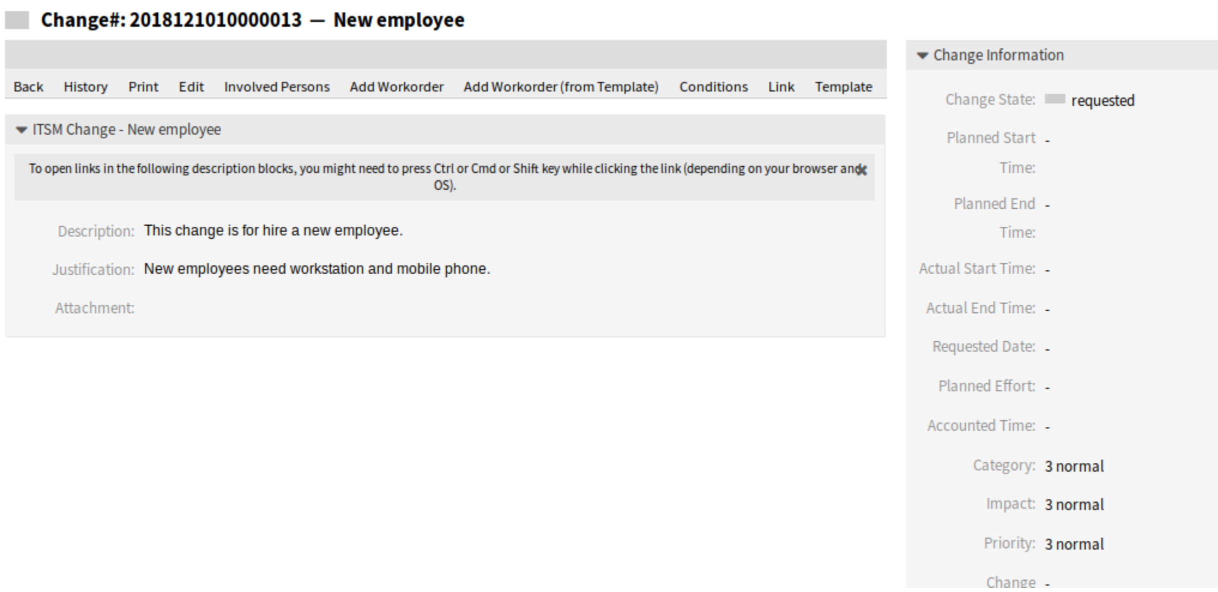


Fig. 21: ITSM Change Zoom Screen

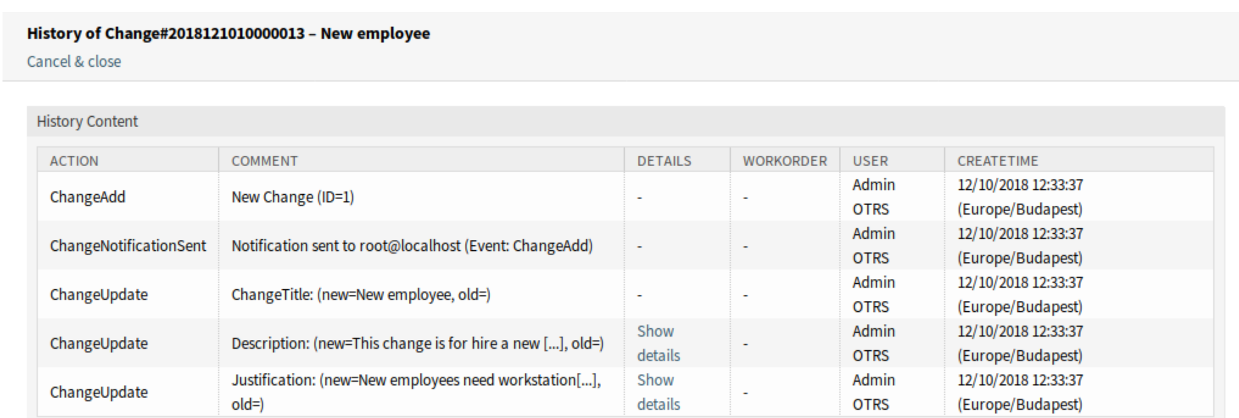


Fig. 22: ITSM Change History Screen

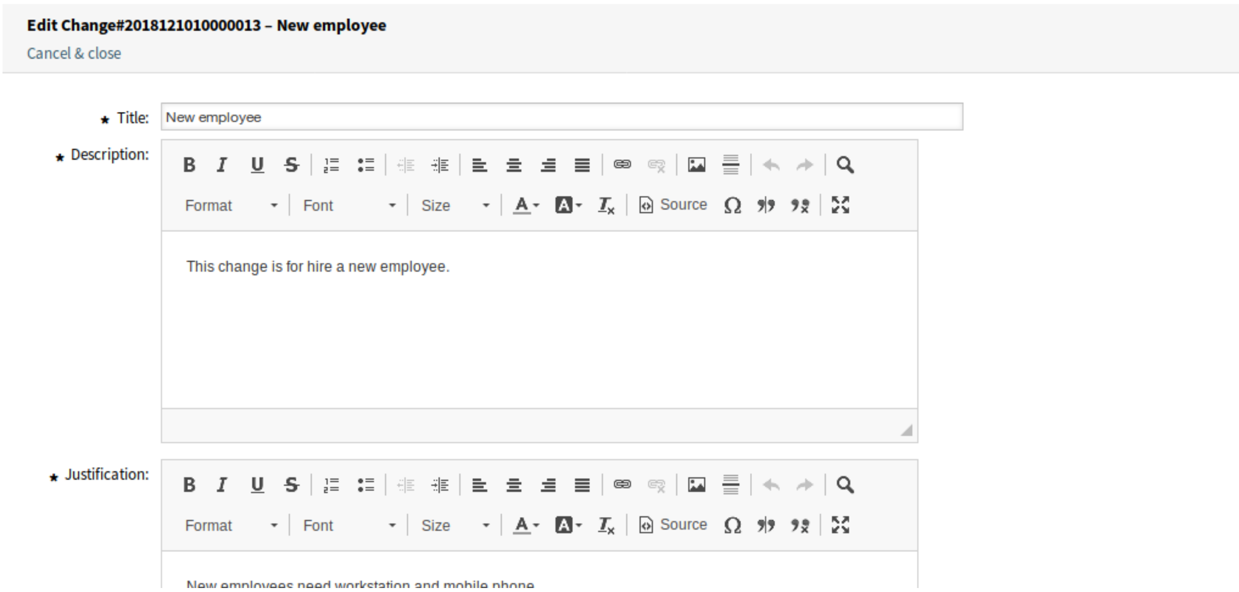


Fig. 23: Edit ITSM Change Screen

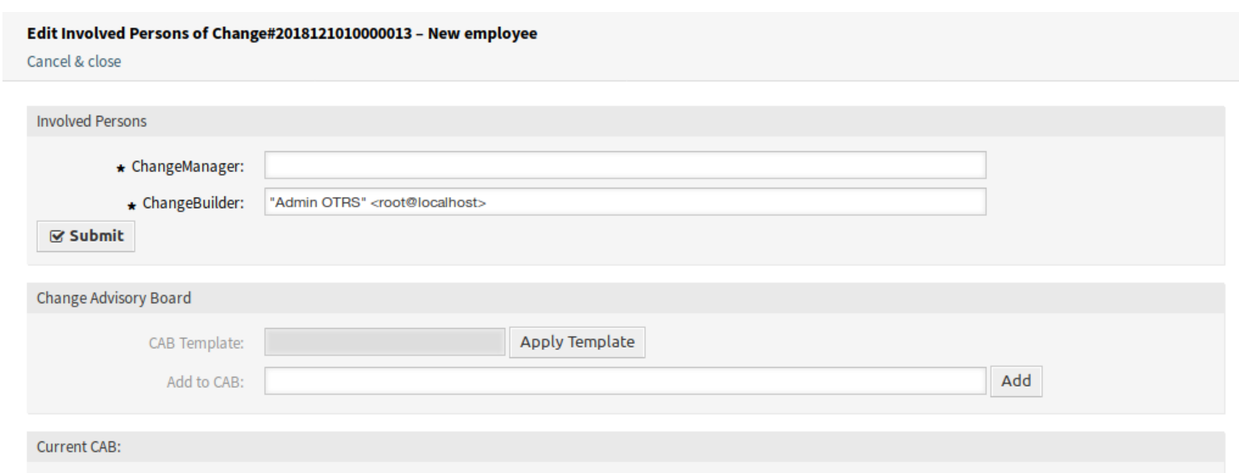


Fig. 24: Involved Persons Screen

Change Builder * Defines the agent who processes and defines the current change. When creating a new change, the current agent is automatically entered as the change builder.

Note: Only those agent can be added as change builder, who is member of group *itsm-change-bulder*.

Change Advisory Board Defines a group of people which can include agents and customers.

Add Workorder Use this window to add new work orders to the change.

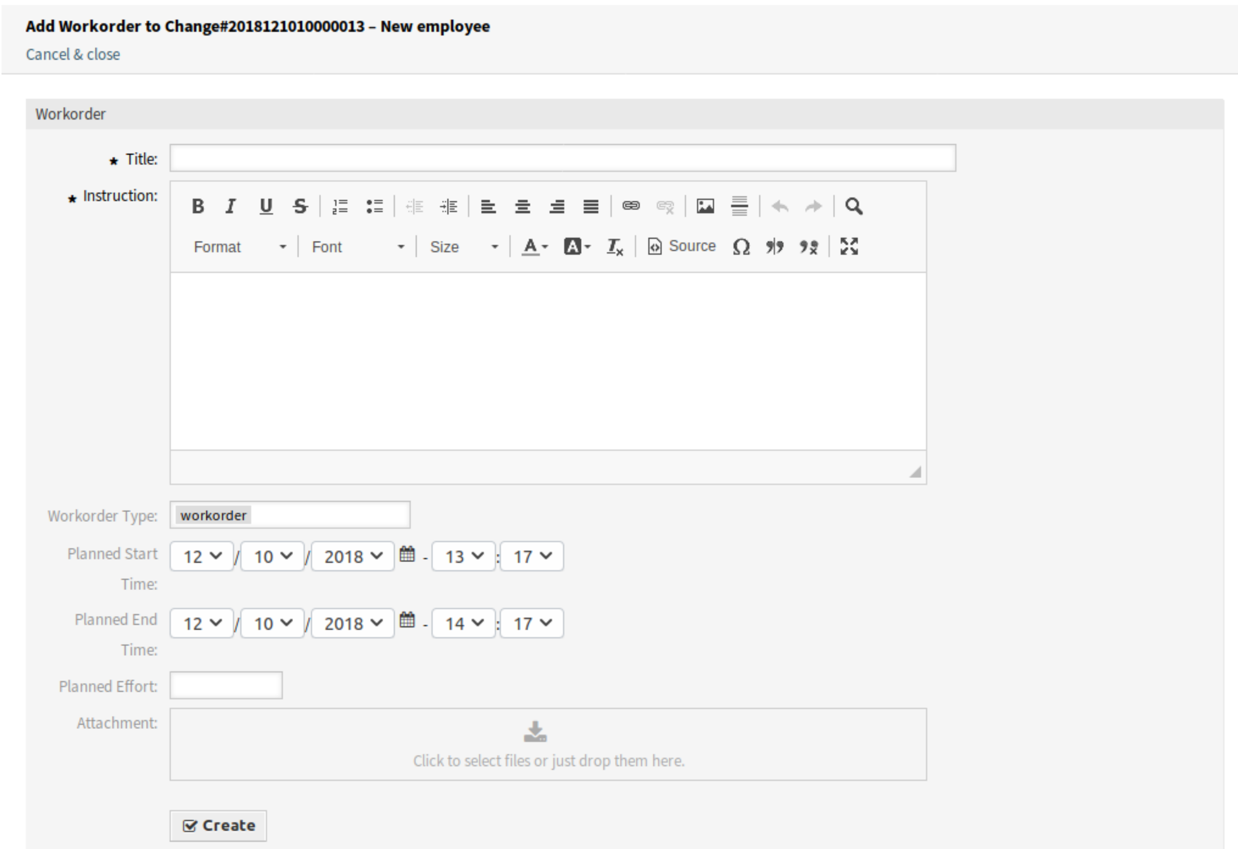


Fig. 25: Add Work Order Screen

The following settings are available when adding or editing this resource. The fields marked with an asterisk are mandatory.

Title * The name of this resource. Any type of characters can be entered to this field including uppercase letters and spaces. The name will be displayed in the overview table.

Instruction * Longer text description of the work order about what to do here.

Workorder Type Select a type for the work order. The types are defined in class `ITSM::ChangeManagement::WorkOrder::Type` in the *General Catalog*.

Planned Start Time Select a planned start time for the work order.

Planned End Time Select a planned end time for the work order.

Planned Effort Add a value in any work unit to specify the planned effort.

Attachment Enables related files and documents to be attached.

After adding a work order, the *Work Order Zoom* screen will be opened in a new browser tab.

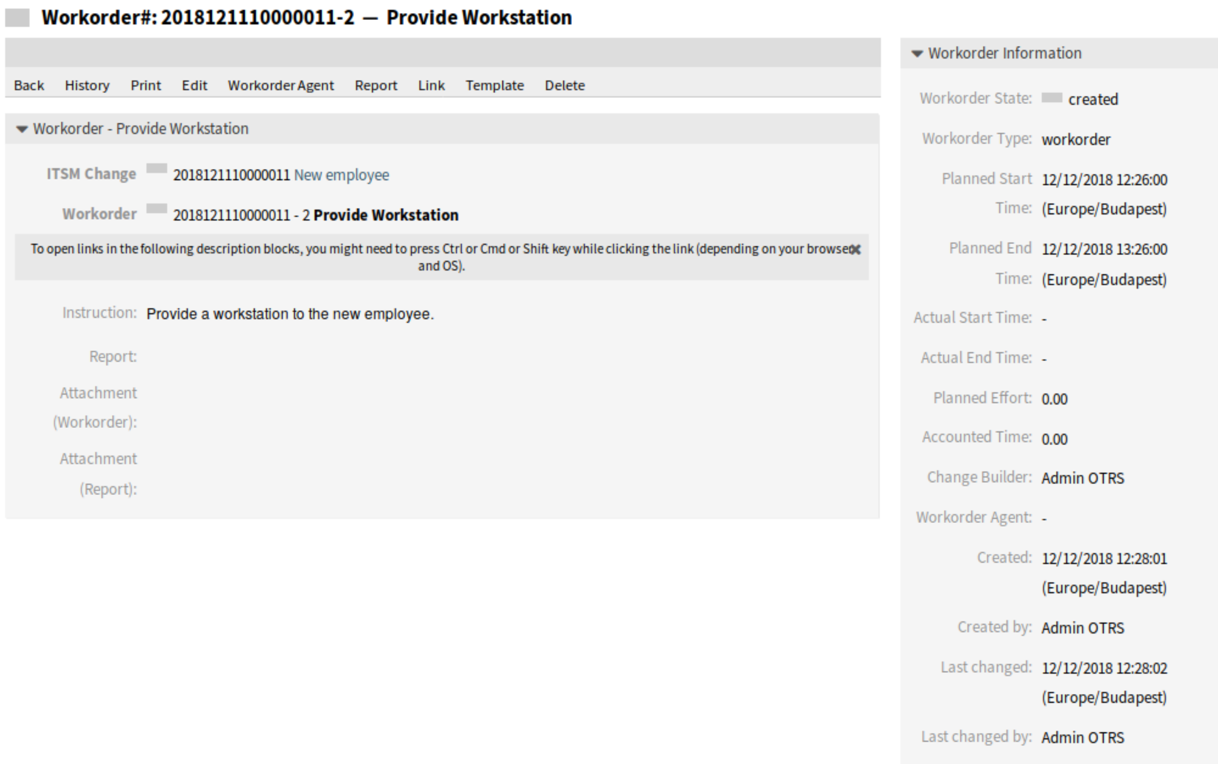


Fig. 26: Work Order Zoom Screen

The *Work Order Zoom* screen has an own menu.

Back This menu item goes back to the previous screen.

History This menu item opens a new window to see the history of the work order.

Print This menu item opens a PDF file to show the printer friendly version of the screen. You can save or print this PDF file.

Edit This menu item opens a new window to edit the work order.

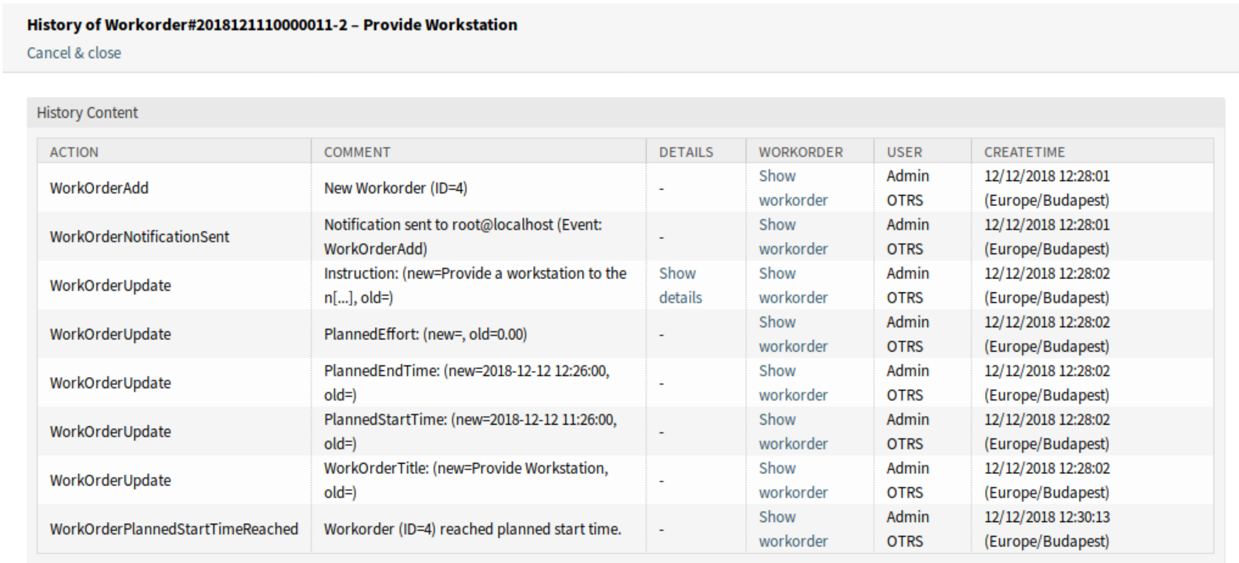
> **Move following workorders accordingly** If this is checked, the subsequent work orders will be moved in time according to times set in *Planned Start Time* and *Planned End Time* fields.

Workorder Agent Use this menu item to assign an agent to the work order.

> **Note:** Only those agent can be added as work order agent, who is member of group *itsm-change*.

Report Use this menu item to document the progress made on the work order. This screen can be used as log of work order.

> **Report *** This is the body of the report. As there is only the same text area for all reports, it is suggested to add timestamps to each entries.
>
> **State** The next state of the work order.



History of Workorder#2018121110000011-2 – Provide Workstation

Cancel & close

History Content

ACTION	COMMENT	DETAILS	WORKORDER	USER	CREATETIME
WorkOrderAdd	New Workorder (ID=4)	-	Show workorder	Admin OTRS	12/12/2018 12:28:01 (Europe/Budapest)
WorkOrderNotificationSent	Notification sent to root@localhost (Event: WorkOrderAdd)	-	Show workorder	Admin OTRS	12/12/2018 12:28:01 (Europe/Budapest)
WorkOrderUpdate	Instruction: (new=Provide a workstation to the n[...], old=)	Show details	Show workorder	Admin OTRS	12/12/2018 12:28:02 (Europe/Budapest)
WorkOrderUpdate	PlannedEffort: (new=, old=0.00)	-	Show workorder	Admin OTRS	12/12/2018 12:28:02 (Europe/Budapest)
WorkOrderUpdate	PlannedEndTime: (new=2018-12-12 12:26:00, old=)	-	Show workorder	Admin OTRS	12/12/2018 12:28:02 (Europe/Budapest)
WorkOrderUpdate	PlannedStartTime: (new=2018-12-12 11:26:00, old=)	-	Show workorder	Admin OTRS	12/12/2018 12:28:02 (Europe/Budapest)
WorkOrderUpdate	WorkOrderTitle: (new=Provide Workstation, old=)	-	Show workorder	Admin OTRS	12/12/2018 12:28:02 (Europe/Budapest)
WorkOrderPlannedStartTimeReached	Workorder (ID=4) reached planned start time.	-	Show workorder	Admin OTRS	12/12/2018 12:30:13 (Europe/Budapest)

Fig. 27: Work Order History Screen

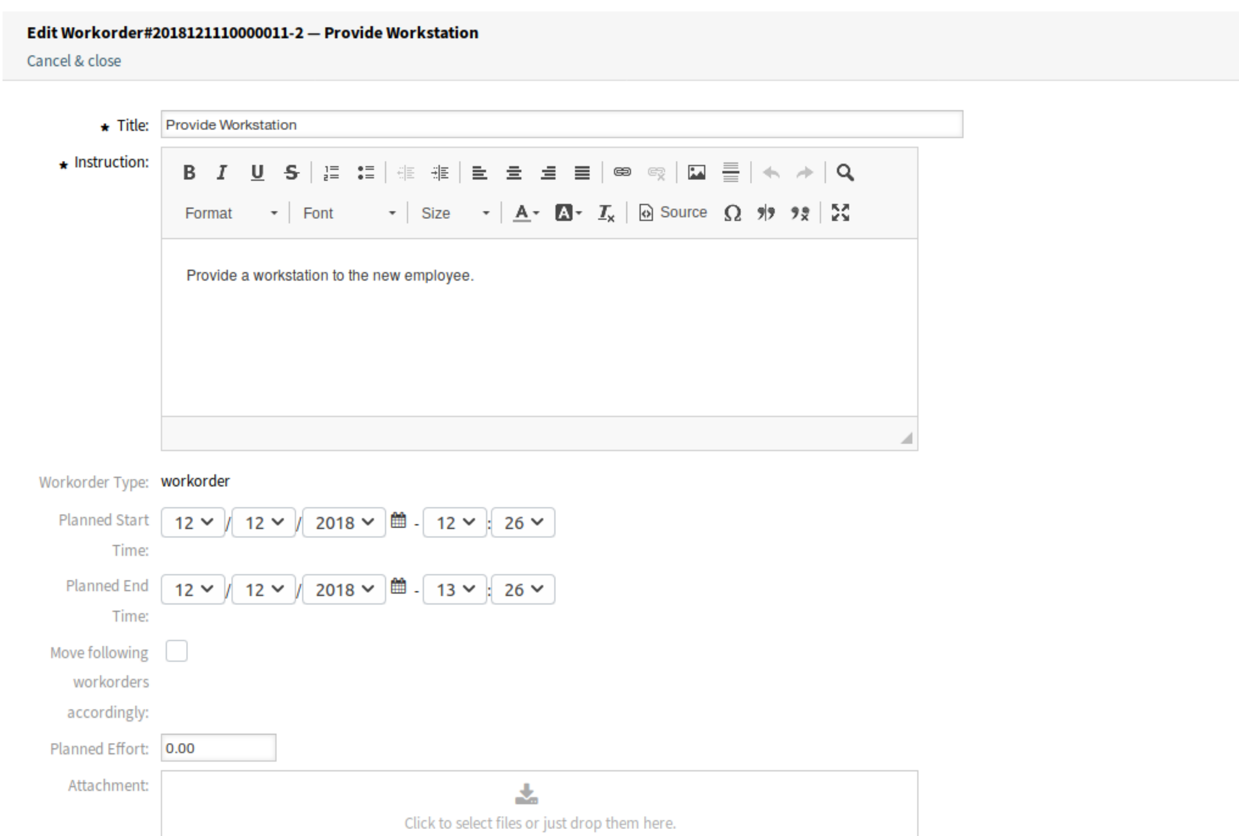


Fig. 28: Edit Work Order Screen

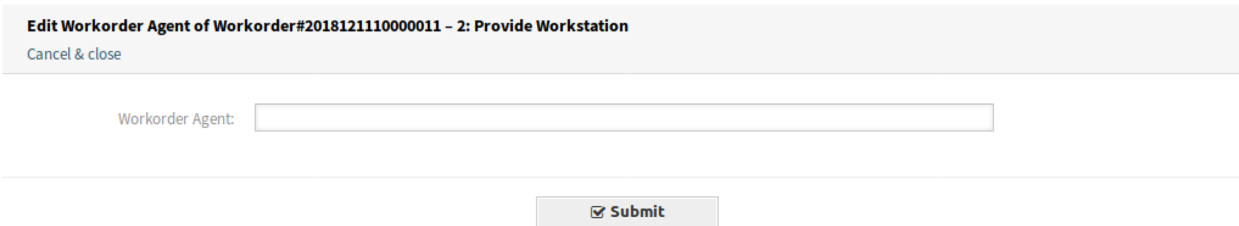


Fig. 29: Edit Work Order Agent Screen

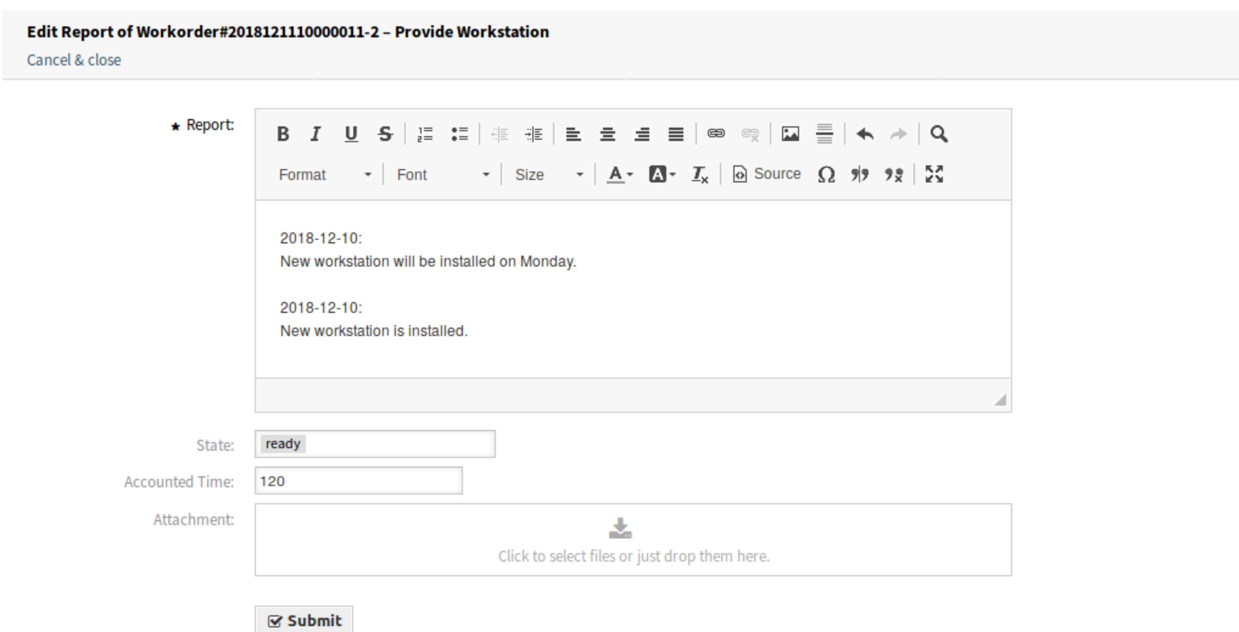


Fig. 30: Work Order Report Screen

See also:

The possible next states are defined in the work order *State Machine*, but they can be filtered using conditions.

Accounted Time Add the accounted time in time units.

Attachment Enables related files and documents to be attached.

Link This menu item opens the standard link screen of OTRS. Work orders can be linked to services or tickets. Existing links can also be managed here.

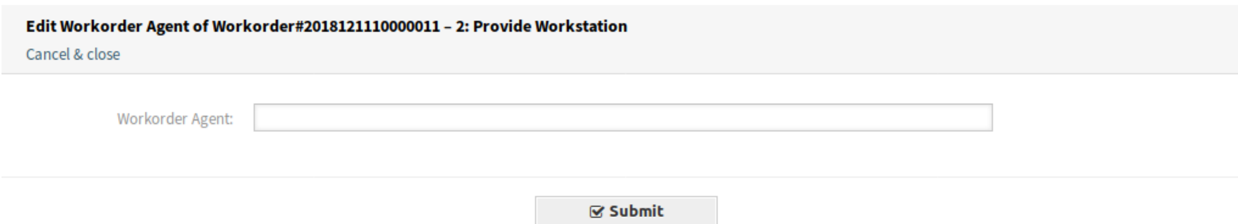


Fig. 31: Link Work Order Screen

Template Use this screen to save the work order as template.

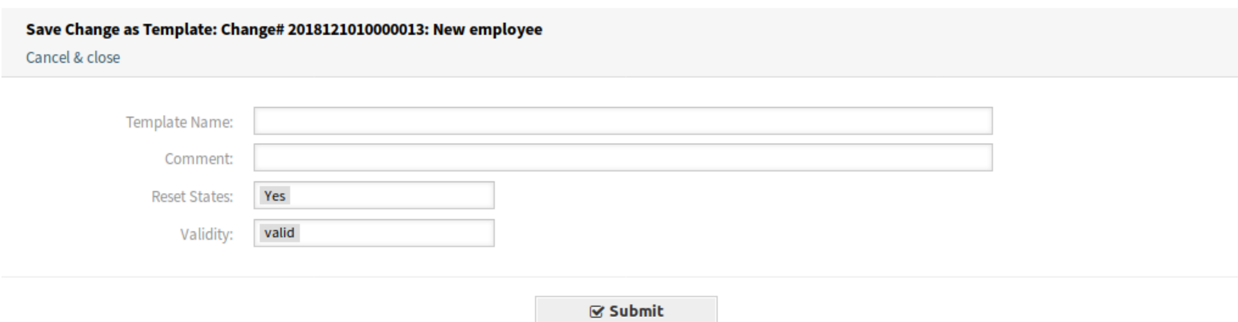


Fig. 32: Save Work Order as Template

Template Name * The name of this resource. Any type of characters can be entered to this field including uppercase letters and spaces. The name will be displayed in the overview table.

Comment Add additional information to this resource.

Note: It is recommended to add a version number in this field to be is easier to identify the correct template.

Reset States All states are reset if selecting *Yes*.

Validity Set the validity of this resource. Each resource can be used in OTRS only, if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the resource.

Delete Use this menu item to delete the work order.

Print This menu item opens a PDF file to show the printer friendly version of the screen. You can save or print this PDF file.

Edit This menu item opens a new window to edit the change.

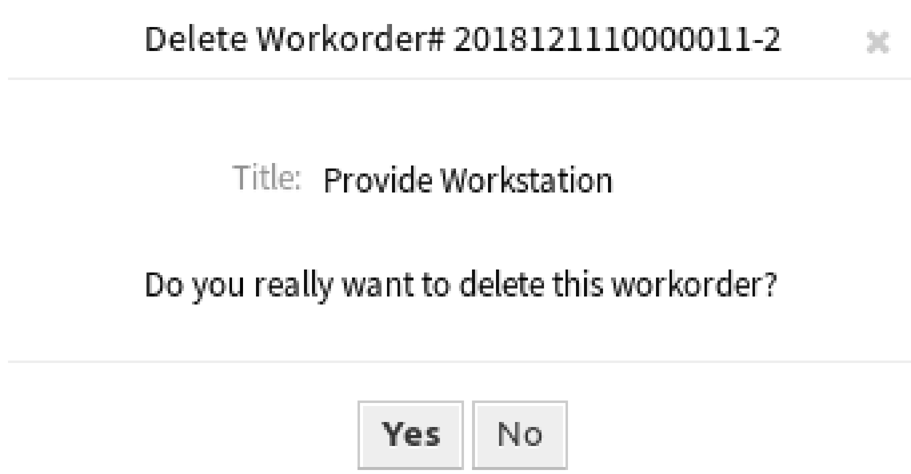


Fig. 33: Delete Work Order Dialog

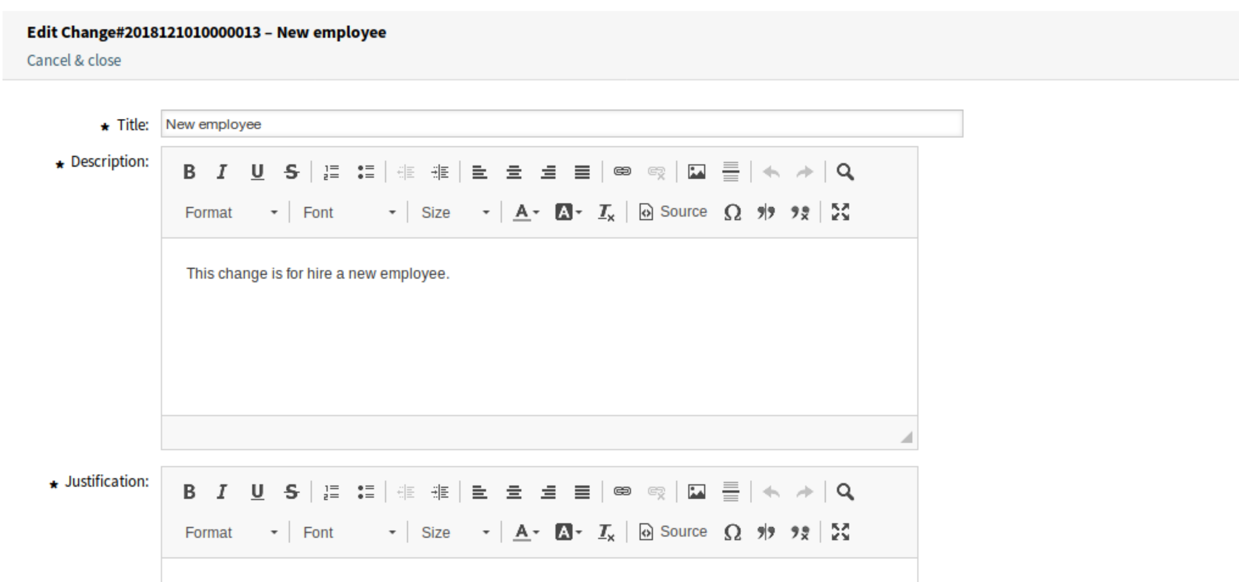


Fig. 34: Edit ITSM Change Screen

Add Workorder (from Template) Use this screen to add a work order from template.

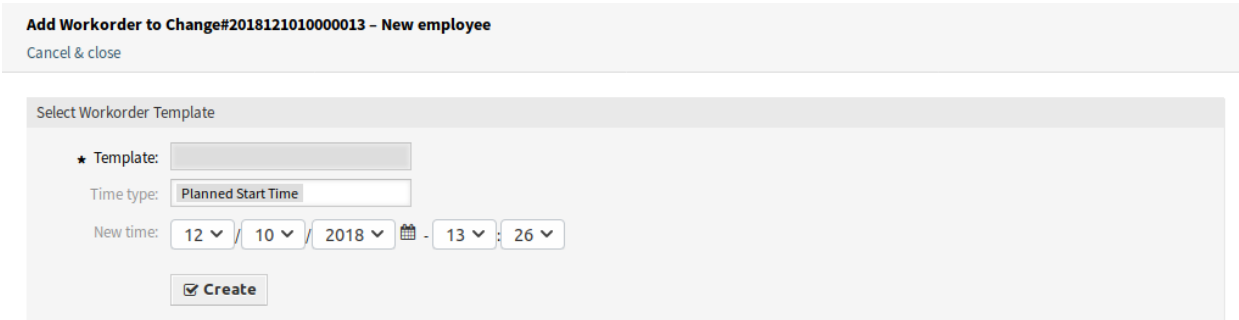


Fig. 35: Add Work Order From Template Screen

Template * Select a work order template from the list of work order templates.

Time type Select the time type that you want to redefine in the next field.

New time Specify a new time for the time type selected above.

See also:

Work order templates can be created with *Template* menu item in the *Work Order Zoom* screen.

Conditions Use this screen to add new conditions to the change.

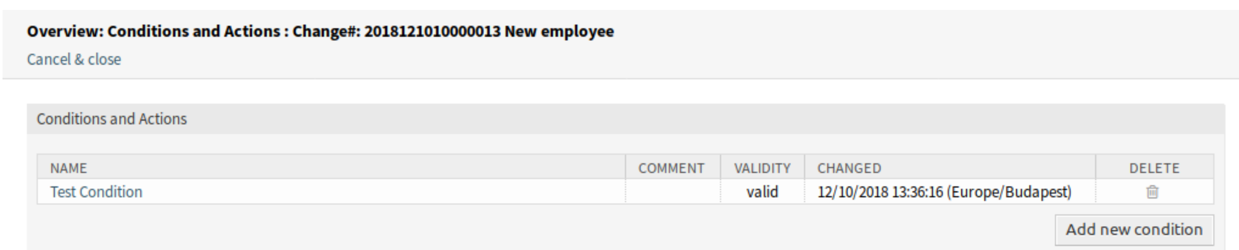


Fig. 36: Condition Overview Screen

Note: The defined conditions are not executed in a certain order.

To add a new condition:

1. Click on the *Add new condition* button.

To edit a condition:

1. Click on a condition in the list of conditions.

To delete a condition:

1. Click on the trash icon in the list of conditions.
2. Click on the *OK* button in the confirmation dialog.

Add Condition and *Edit Condition* screens consist of three widgets.

In the *Condition* widget:

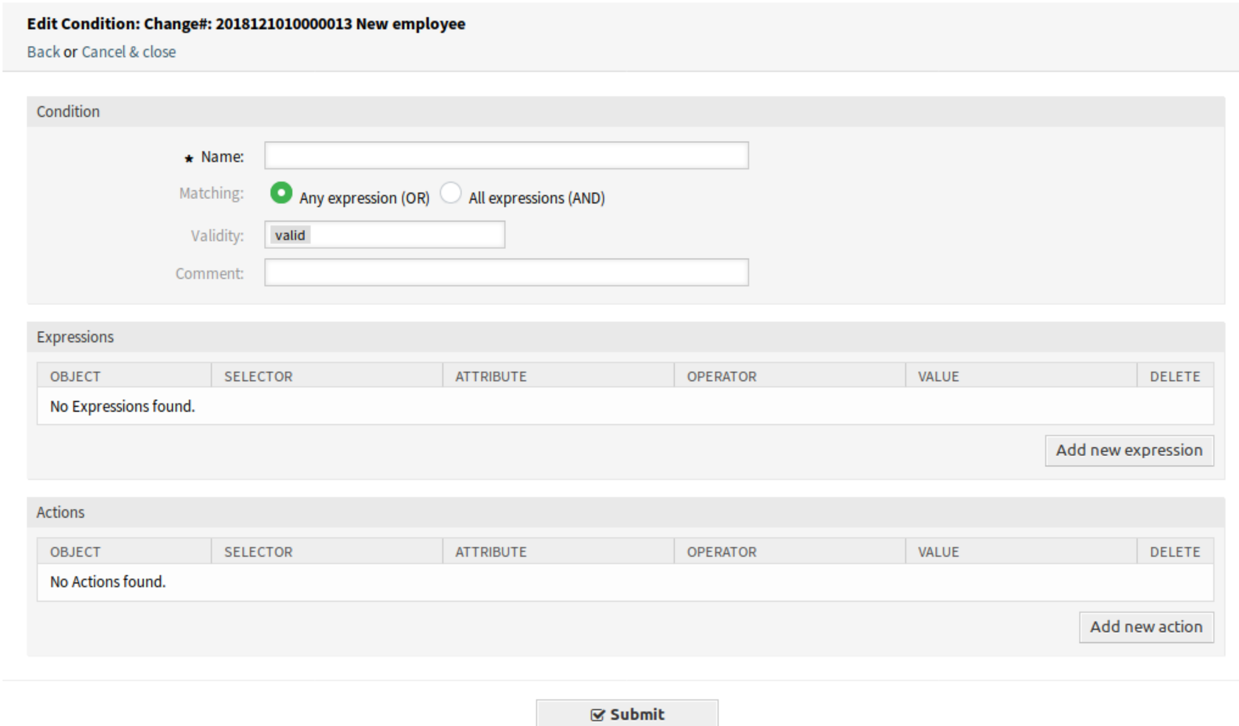


Fig. 37: Add Condition Screen

Name * The name of this resource. Any type of characters can be entered to this field including uppercase letters and spaces. The name will be displayed in the overview table.

> **Note:** Conditions are sorted by name. Use *100*, *200*, etc. as prefix to set the sorting order. All conditions will be evaluated regardless of its position.

Matching Matching type of expressions.

Validity Set the validity of this resource. Each resource can be used in OTRS only, if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the resource.

Comment Add additional information to this resource. It is recommended to always fill this field as a description of the resource with a full sentence for better clarity, because the comment will be also displayed in the overview table.

In the *Expressions* widget the expression can be added. The matching type of expressions (*OR* or *AND*) can be defined above.

In the *Actions* widget the actions can be added to be executed if the expressions are met. The operator *set* enables the selected attribute to be set at a specific value, if the defined condition is true. On the other hand, the operator *lock* freezes the selected attribute, for as long as the defined condition is true, i.e. a manual change is not possible.

> **Note:** Actions are processed in the order they were set.

Link This menu item opens the standard link screen of OTRS. Changes can be linked to any other objects like FAQ articles, services, tickets or configuration items. Existing links can also be managed here.

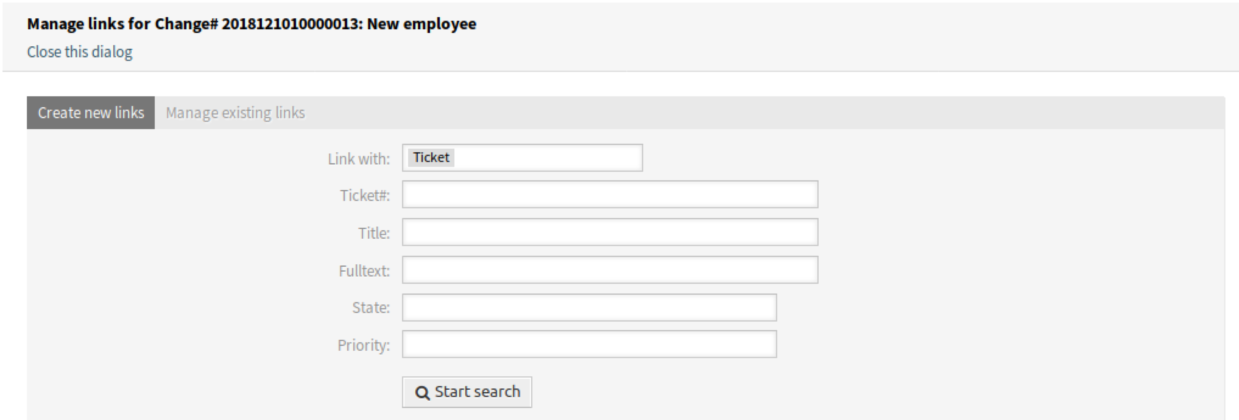


Fig. 38: Link ITSM Change Screen

Move Time Slot Use this screen to shift the planned change implementation time frame.

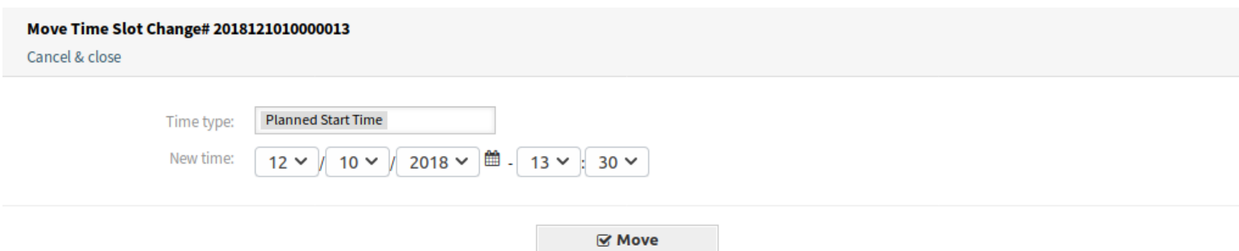


Fig. 39: Move Time Slot Screen

Time type Select the time type that you want to redefine in the next field.

New time Specify a new time for the time type selected above.

Template Use this screen to save the change as template. New changes can be start from template in *New (From Template)* menu item.

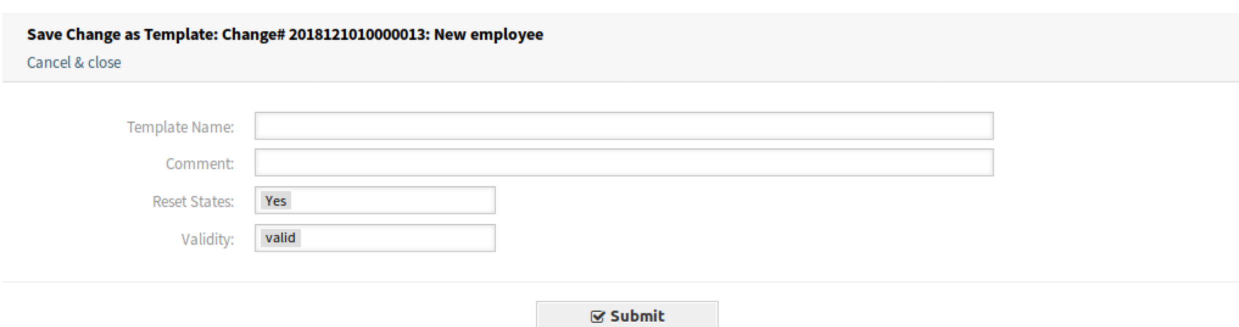


Fig. 40: Save Change as Template

Template Name * The name of this resource. Any type of characters can be entered to this field including uppercase letters and spaces. The name will be displayed in the overview table.

Comment Add additional information to this resource.

Note: It is recommended to add a version number in this field to be is easier to identify the correct template.

Reset States All states are reset if selecting *Yes*.

Validity Set the validity of this resource. Each resource can be used in OTRS only, if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the resource.

4.2.1.2 New

Use this screen to add new changes to the change management.

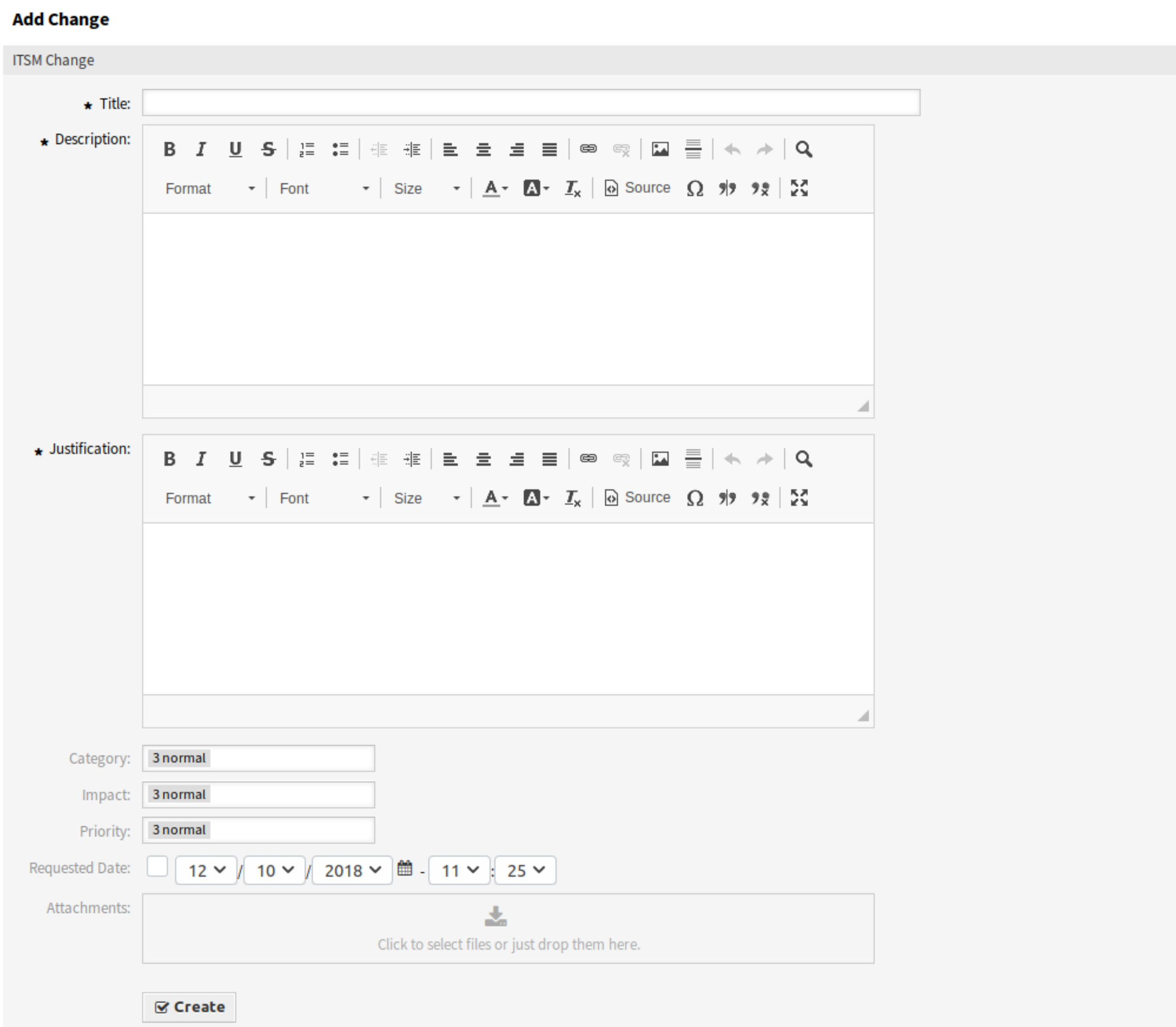


Fig. 41: Add Change Screen

The following settings are available when adding or editing this resource. The fields marked with an asterisk are mandatory.

Title * The name of this resource. Any type of characters can be entered to this field including uppercase letters and spaces. The name will be displayed in the overview table.

Description * Longer text description of the change.

Justification * Text explanation of the reasons behind the change. Answer to the question: *What is the likely consequence if the change is not implemented?*

Category * Defines the type of change.

Impact * Defines the effects or impact the change will have.

Priority * Defines the priority of the change from the selected *Category* and *Impact*.

See also:

See the *Category Impact Priority* matrix to define the priority.

Requested Date Select a date when a customer requested the change.

See also:

This attribute can be deactivated in system configuration under `Frontend → Agent → View`.

Attachments Enables related files and documents to be attached.

4.2.1.3 New (From Template)

Use this screen to add new changes from template.

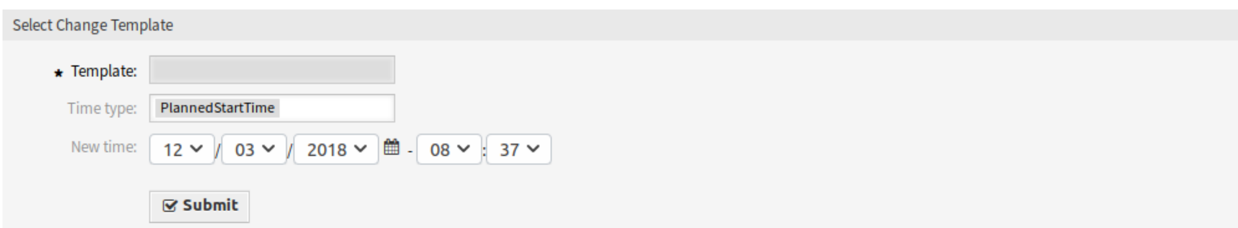


Fig. 42: Add Change Screen

See also:

Templates can be saved in the *Change Zoom* screen using the *Template* menu item.

Template * Select a change from the list.

Time type Select the type of planned time to be set in the next field.

New time Specify the new time for the time selected above. This time will be used in the change instead of the saved one.

See also:

Templates can be edited in the *Templates* screen.

4.2.1.4 Schedule

Use this screen to filter ITSM changes based on certain criteria. This overview screen is available in the *Schedule* menu item of the *ITSM Changes* menu.

Changes can be filtered by clicking on a state name in the header of the overview widget. The numbers after the state names indicates how many changes are in each states.

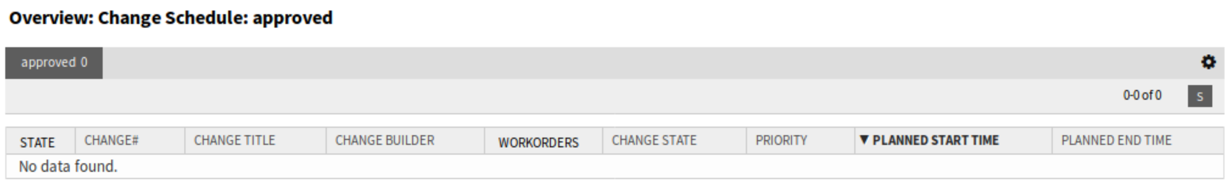


Fig. 43: ITSM Change Schedule Screen

See also:

See setting `ITSMChange::Frontend::AgentITSMChangeSchedule###Filter::ChangeStates` to define the change states that will be used as filters in the overview.

To limit the number of displayed changes per page:

1. Click on the gear icon in the top right corner of the overview header.
2. Select the maximum number of changes displayed per page.
3. Click on the *Save* button.

To see the details of a change:

1. Click on the row of a change.

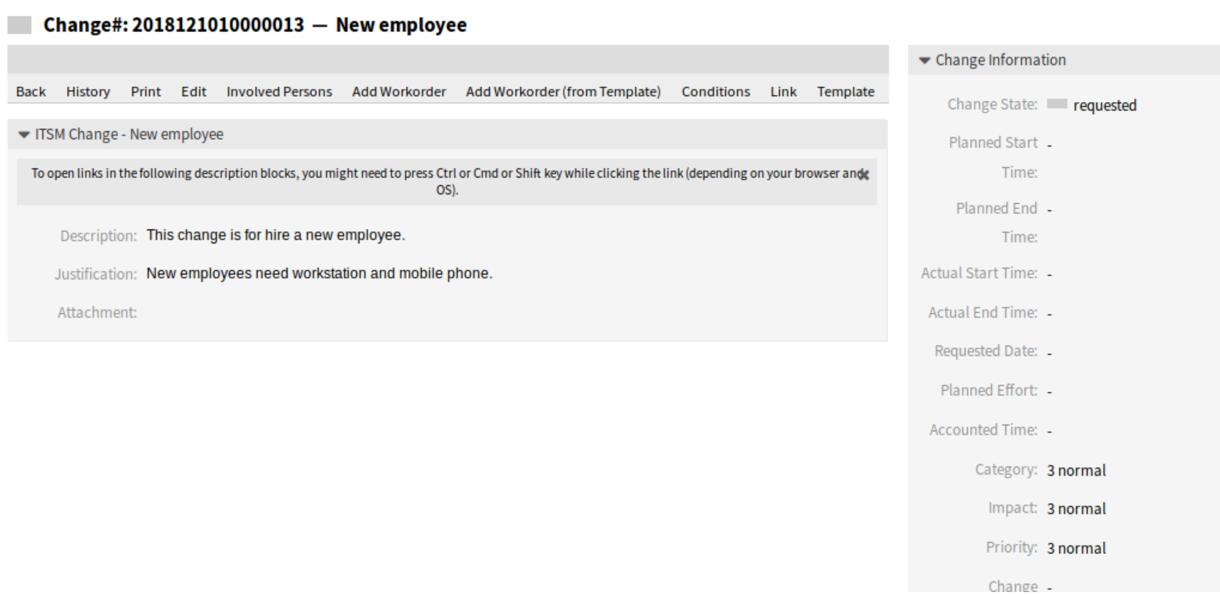


Fig. 44: ITSM Change Zoom Screen

The displayed attributes can be defined via the system configuration. Not all attributes are displayed by default. The possible attributes are:

`ActualEndTime` Date and time at which the change implementation was completed.

`ActualStartTime` Date and time at which the change implementation began.

`Category` Category or type of change.

`ChangeBuilder` Name of the change builder.

`ChangeManager` Name of the change manager.

`ChangeNumber` System generated change number.

`ChangeState` Change status.

`ChangeStateSignal` Change status indicator to be shown as traffic light.

`ChangeTime` Date and time at which the change was modified.

`ChangeTitle` Name of the change.

`CreateTime` Date and time at which the change was created.

`DynamicField_ChangeFieldName` Dynamic field that is associated to the change.

`Impact` Expected effect of the change.

`PlannedEndTime` Projected change implementation completion date and time.

`PlannedStartTime` Planned change implementation start date and time.

`Priority` Priority level of the change.

`RequestedTime` Customer’s desired implementation date.

`Services` Services affected by the change.

`WorkOrderCount` Number of work orders related to the change.

See also:

See setting `ITSMChange::Frontend::AgentITSMChangeSchedule###ShowColumns` to define the displayed attributes.

4.2.1.5 Projected Service Availability

Use this screen to filter ITSM changes based on certain criteria. This overview screen is available in the *Projected Service Availability* menu item of the *ITSM Changes* menu.

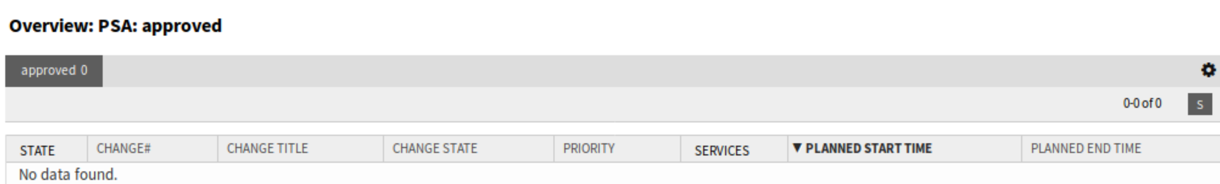


Fig. 45: Projected Service Availability Screen

Changes can be filtered by clicking on a state name in the header of the overview widget. The numbers after the state names indicates how many changes are in each states.

See also:

See setting `ITSMChange::Frontend::AgentITSMChangePSA###Filter::ChangeStates` to define the change states that will be used as filters in the overview.

To limit the number of displayed changes per page:

1. Click on the gear icon in the top right corner of the overview header.
2. Select the maximum number of changes displayed per page.
3. Click on the *Save* button.

To see the details of a change:

1. Click on the row of a change.

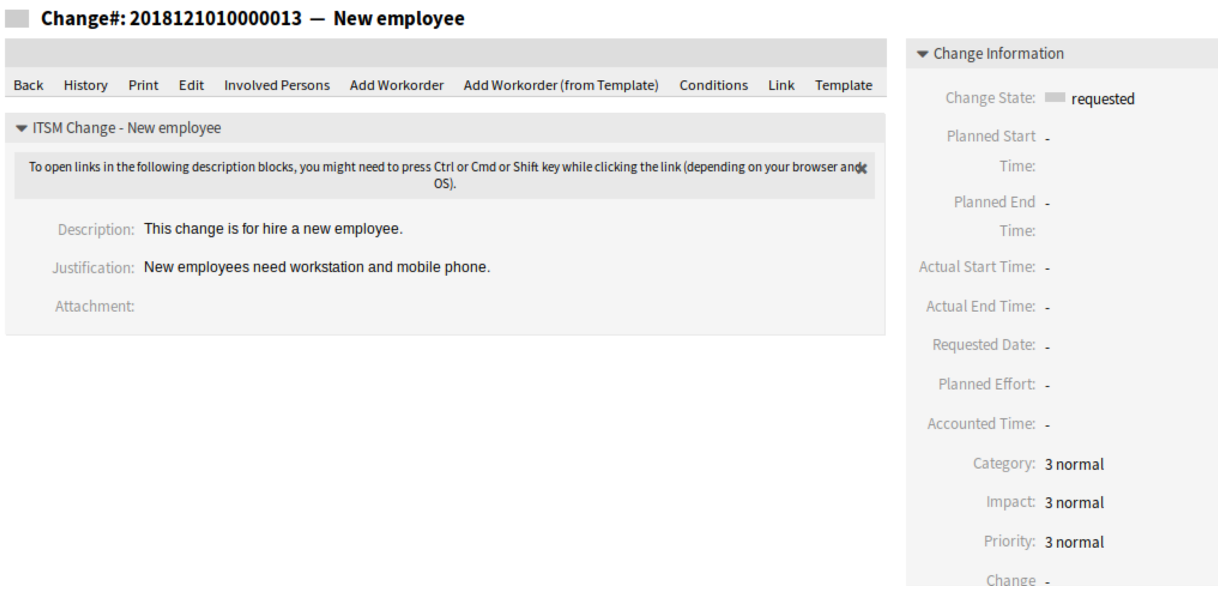


Fig. 46: ITSM Change Zoom Screen

The displayed attributes can be defined via the system configuration. Not all attributes are displayed by default. The possible attributes are:

`ActualEndTime` Date and time at which the change implementation was completed.

`ActualStartTime` Date and time at which the change implementation began.

`Category` Category or type of change.

`ChangeBuilder` Name of the change builder.

`ChangeManager` Name of the change manager.

`ChangeNumber` System generated change number.

`ChangeState` Change status.

`ChangeStateSignal` Change status indicator to be shown as traffic light.

`ChangeTime` Date and time at which the change was modified.

`ChangeTitle` Name of the change.

`CreateTime` Date and time at which the change was created.

`DynamicField_ChangeFieldName` Dynamic field that is associated to the change.

`Impact` Expected effect of the change.

`PlannedEndTime` Projected change implementation completion date and time.

`PlannedStartTime` Planned change implementation start date and time.

`Priority` Priority level of the change.

`RequestedTime` Customer’s desired implementation date.

Services Services affected by the change.

WorkOrderCount Number of work orders related to the change.

See also:

See setting `ITSMChange::Frontend::AgentITSMChangePSA###ShowColumns` to define the displayed attributes.

4.2.1.6 PIR

Use this screen to filter work orders based on certain criteria. This overview screen is available in the *PIR* menu item of the *ITSM Changes* menu.

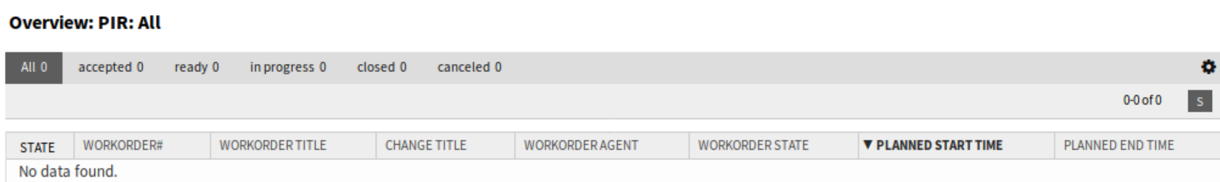


Fig. 47: Post Implementation Review Screen

Work orders can be filtered by clicking on a state name in the header of the overview widget. The numbers after the state names indicates how many work orders are in each states.

See also:

See setting `ITSMChange::Frontend::AgentITSMChangePIR###Filter::WorkOrderStates` to define the work order states that will be used as filters in the overview.

To limit the number of displayed work orders per page:

1. Click on the gear icon in the top right corner of the overview header.
2. Select the maximum number of work orders displayed per page.
3. Click on the *Save* button.

To see the details of a work order:

1. Click on the row of a work order.

The displayed attributes can be defined via the system configuration. Not all attributes are displayed by default. The possible attributes are:

ActualEndTime Date and time at which the change implementation was completed.

ActualStartTime Date and time at which the change implementation began.

Category Category or type of change.

ChangeBuilder Name of the change builder.

ChangeManager Name of the change manager.

ChangeNumber System generated change number.

ChangeState Change status.

ChangeStateSignal Change status indicator to be shown as traffic light.

ChangeTime Date and time at which the change was modified.

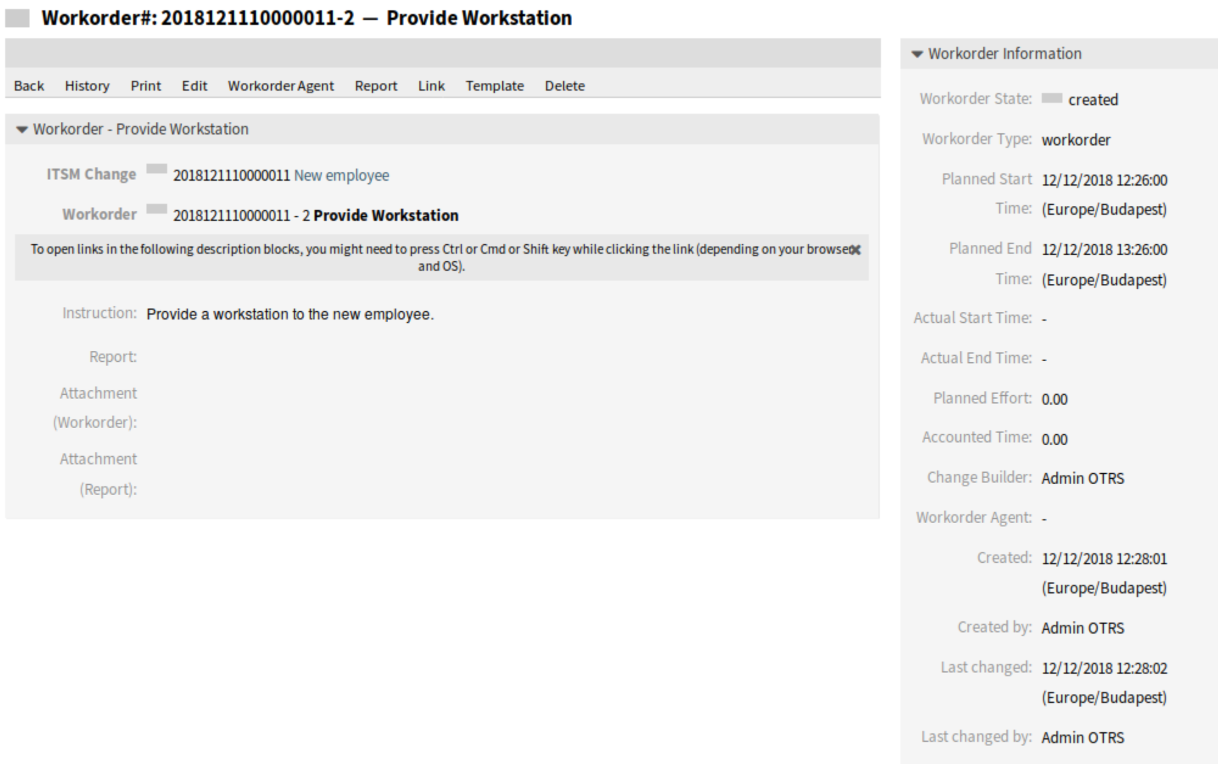


Fig. 48: Work Order Zoom Screen

`ChangeTitle` Name of the change.

`CreateTime` Date and time at which the change was created.

`DynamicField_WorkOrderFieldName` Dynamic field that is associated to the work order.

`Impact` Expected effect of the change.

`PlannedEndTime` Projected change implementation completion date and time.

`PlannedStartTime` Planned change implementation start date and time.

`Priority` Priority level of the change.

`RequestedTime` Customer's desired implementation date.

`Services` Services affected by the change.

`WorkOrderAgent` Agent assigned to the PIR.

`WorkOrderCount` Number of work orders related to the change.

`WorkOrderNumber` System generated work order number.

`WorkOrderState` Status of the work order.

`WorkOrderStateSignal` Work order status indicator to be shown as traffic light.

`WorkOrderTitle` Name of the work order.

`WorkOrderType` Type of the work order.

See also:

See setting `ITSMChange::Frontend::AgentITSMChangePIR###ShowColumns` to define the displayed attributes.

4.2.1.7 Templates

Use this screen to manage templates for ITSM changes. The template management screen is available in the *Templates* menu item of the *ITSM Changes* menu.

Fig. 49: Template Management Screen

Templates can be filtered by clicking on a type name in the header of the overview widget. There is an option *All* to see all templates. The numbers after the type names indicates how many templates are in each types.

See also:

See setting `ITSMChange::Frontend::AgentITSMTemplateOverview###Filter::TemplateTypes` to define the template types that will be used as filters in the overview.

To add a new template:

1. Go to the *New* ITSM change screen.
2. Create new changes, work orders or CABs.
3. Click on the *Template* menu item to save it as template.

To edit basic information of a template:

1. Click on the template name in the list of templates.
2. Modify the fields.
3. Click on the *Save* button.

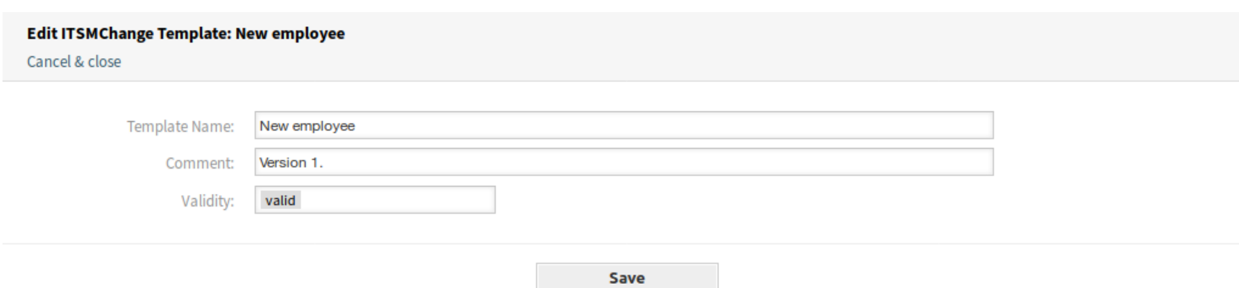


Fig. 50: Edit Template Basic Information Screen

To edit the content of a template:

1. Click on the pencil icon in the *Edit Content* column.
2. Click on the *Yes* button in the confirmation dialog.

3. Modify the created change.
4. Click on the *Template* menu item to save it as template.

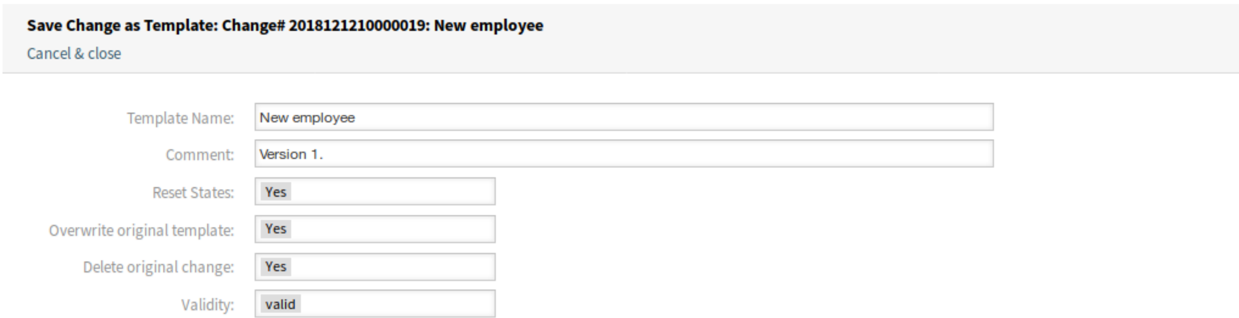


Fig. 51: Edit Template Content Screen

Note: This will create a new change from this template, so you can edit and save it. The new change will be deleted automatically after it has been saved as template.

To delete a template:

1. Click on the trash icon in the list of templates.
2. Click on the *Yes* button.

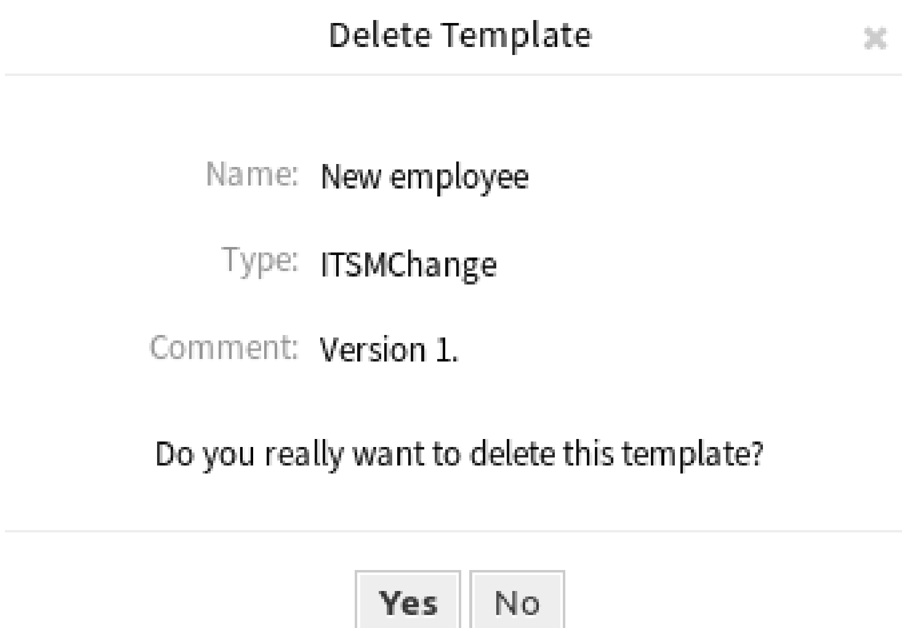


Fig. 52: Delete Template Screen

The displayed attributes can be defined via the system configuration. Not all attributes are displayed by default. The possible attributes are:

`ChangeBy` Username of the agent who last modified the template.

`ChangeTime` Date and time at which the template was modified.

`Comment` Comments or description of the template.

`CreateBy` Username of the agent who created the template.

`CreateTime` Date and time at which the template was created.

`Delete` Option to delete a chosen template.

`EditContent` Option to edit the content of a chosen template.

`Name` Name of the template.

`Type` Type of the template.

`Valid` Validity of the template. Templates with *invalid* or *invalid-temporarily* validity cannot be used by change builders.

See also:

See setting `ITSMChange::Frontend::AgentITSMTemplateOverview###ShowColumns` to define the displayed attributes.

4.2.1.8 Search

Use this screen to search for changes.

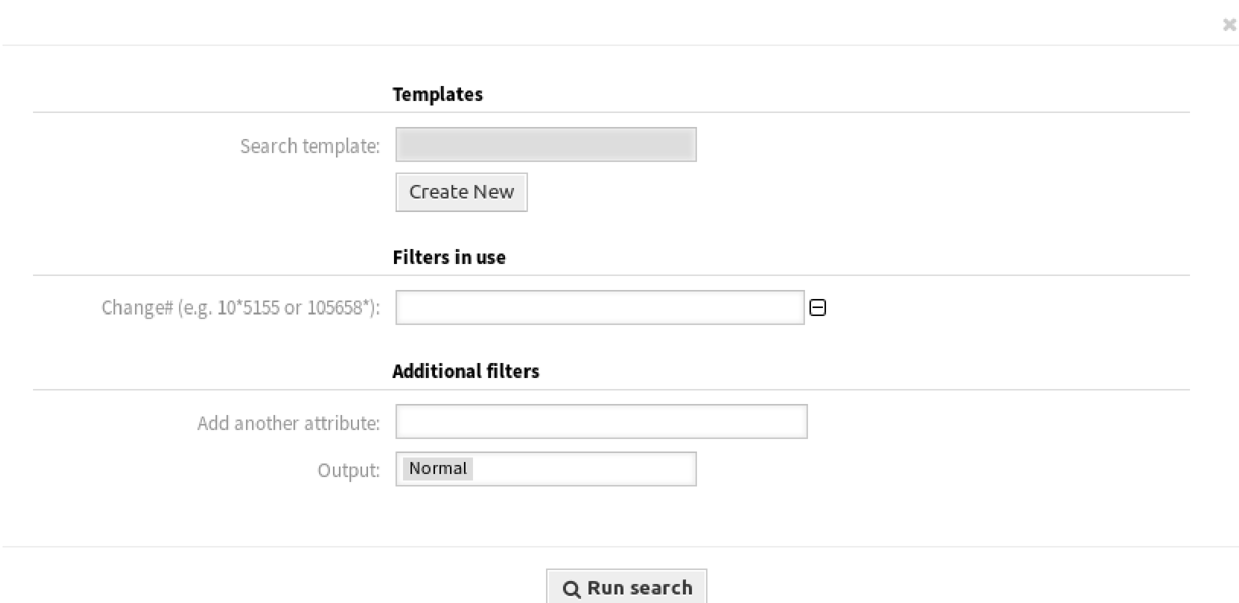


Fig. 53: Search ITSM Change Screen

To search for changes:

1. Click on the *Search* menu item in the *ITSM Changes* menu.
2. Fill in the required fields.
3. Click on the *Run Search* button.
4. See the search result.

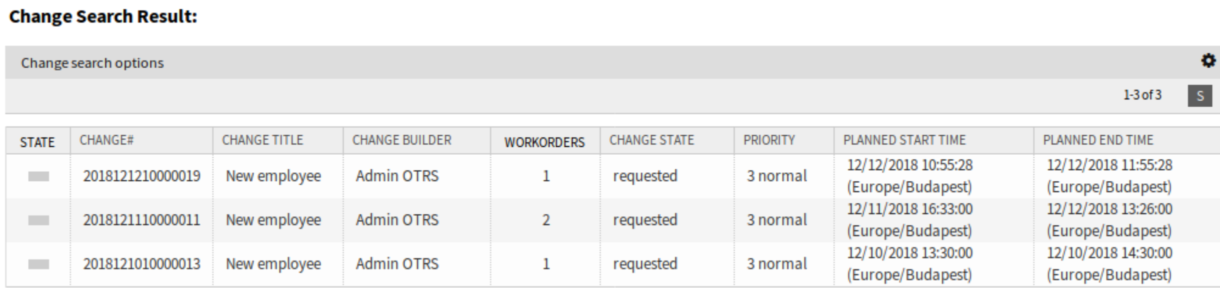


Fig. 54: Search Result Screen

To limit the number of displayed changes per page:

1. Click on the gear icon in the top right corner of the overview header.
2. Select the maximum number of changes displayed per page.
3. Click on the *Save* button.

To see the details of a change:

1. Click on the row of a change.

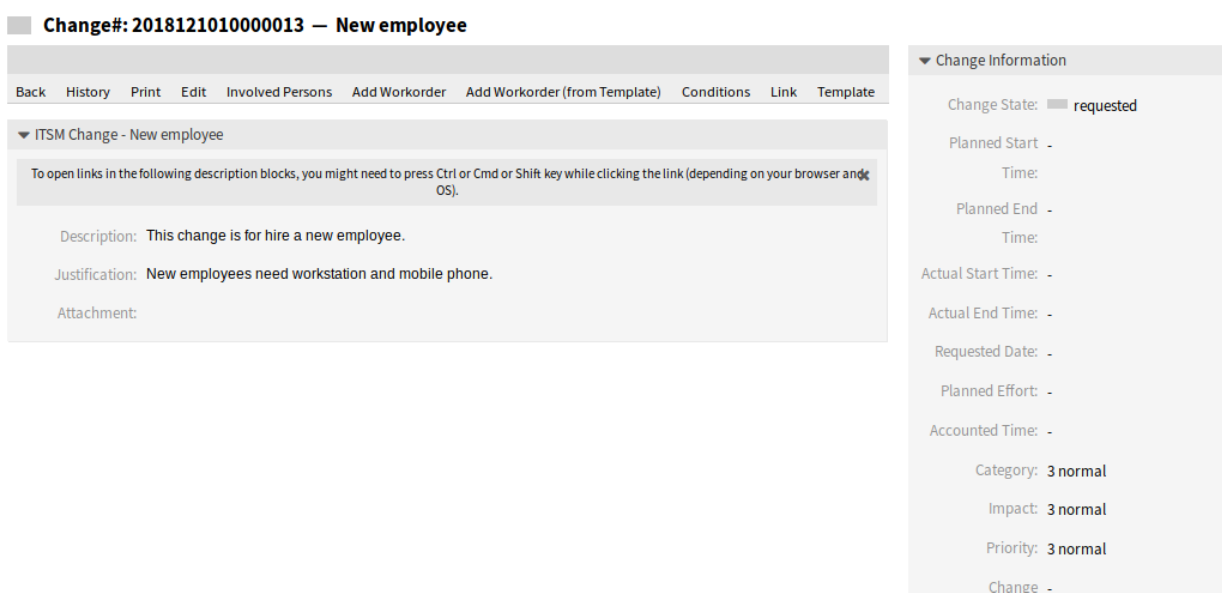


Fig. 55: ITSM Change Zoom Screen

The displayed attributes can be defined via the system configuration. Not all attributes are displayed by default. The possible attributes are:

`ActualEndTime` Date and time at which the change implementation was completed.

`ActualStartTime` Date and time at which the change implementation began.

`Category` Category or type of change.

`ChangeBuilder` Name of the change builder.

`ChangeManager` Name of the change manager.

ChangeNumber System generated change number.

ChangeState Change status.

ChangeStateSignal Change status indicator to be shown as traffic light.

ChangeTime Date and time at which the change was modified.

ChangeTitle Name of the change.

CreateTime Date and time at which the change was created.

DynamicField_ChangeFieldName Dynamic field that is associated to the change.

Impact Expected effect of the change.

PlannedEndTime Projected change implementation completion date and time.

PlannedStartTime Planned change implementation start date and time.

Priority Priority level of the change.

RequestedTime Customer's desired implementation date.

Services Services affected by the change.

WorkOrderCount Number of work orders related to the change.

See also:

See setting `ITSMChange::Frontend::AgentITSMChangeSearch###ShowColumns` to define the displayed attributes.

4.3 External Interface

This package has no external interface.

CHAPTER 5

ITSM Configuration Management

The configuration management database (CMDB) is not a database in the technical sense, but a conceptual IT model, which is indispensable for efficient IT service management. All IT components and inventories are managed in the CMDB. Configuration management exceeds asset management, often incorrectly used as a synonym, as it does not only document assets from a financial point of view, but captures information regarding the relationship between components, specifications, or their location. Thus IT support can quickly access information on the interdependence of IT services and the IT components (aka. configuration items or CIs) necessary for them.

Note: This package requires the *General Catalog* and the *ITSM Core* features.

5.1 Administrator Interface

This chapter describes the new features that are available in the administrator interface after installation of the package.

5.1.1 Users, Groups & Roles

After installation of the package a new group is added to the system.

5.1.1.1 Groups

After installation of the package a new group is added to the system. The group management screen is available in the *Groups* module of the *Users, Groups & Roles* group.

New Group

After installation of the package the following group is added to the system:

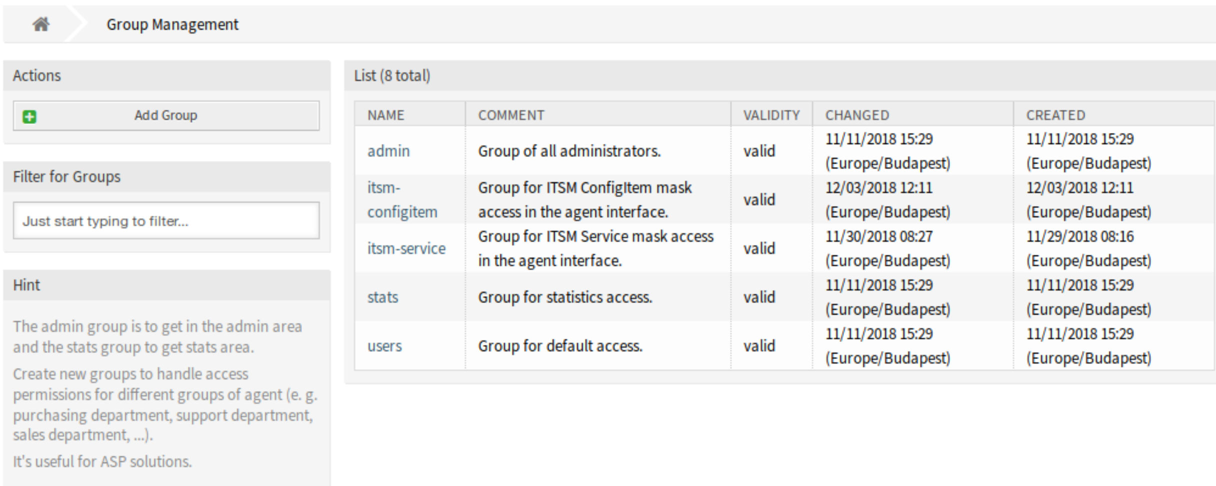


Fig. 1: Group Management Screen

itsm-configitem Group for accessing the *ITSM Configuration Item* screen of the agent interface.

Note: The primary administrator user (root@localhost) is added to the group with permission *rw* by default.

See also:

To set the correct permissions for other users, check the following relations:

- *Agents Groups*
- *Customers Groups*
- *Customer Users Groups*
- *Roles Groups*

5.1.2 Processes & Automation

After installation of the package two new scripts are added to the script task activity element of process management and some new operations are added to the generic interface.

5.1.2.1 Process Management

After installation of the package two new scripts are added to the script task activity element of process management.

New Scripts

To see the new scripts:

1. Go to the *Process Management* screen of the administrator interface.
2. Create a new process or select an existing process that contains a script task activity.

3. Click on the *Activities* item in the *Available Process Elements* widget in the left sidebar.
4. Create a new script task activity or edit an existing one.
5. Select one of the new scripts `TicketLinkITSMConfigItem` and `TicketUpdateByLinkedCI` in the *Script* drop-down.
6. Click on the *Save* button, if the *Configure* button is not visible next to the *Script* drop-down.
7. Click on the *Configure* button to add parameters (key-value pairs) for the script.

`TicketLinkITSMConfigItem`

This script searches for one or more configuration items and link all matches to the ticket.

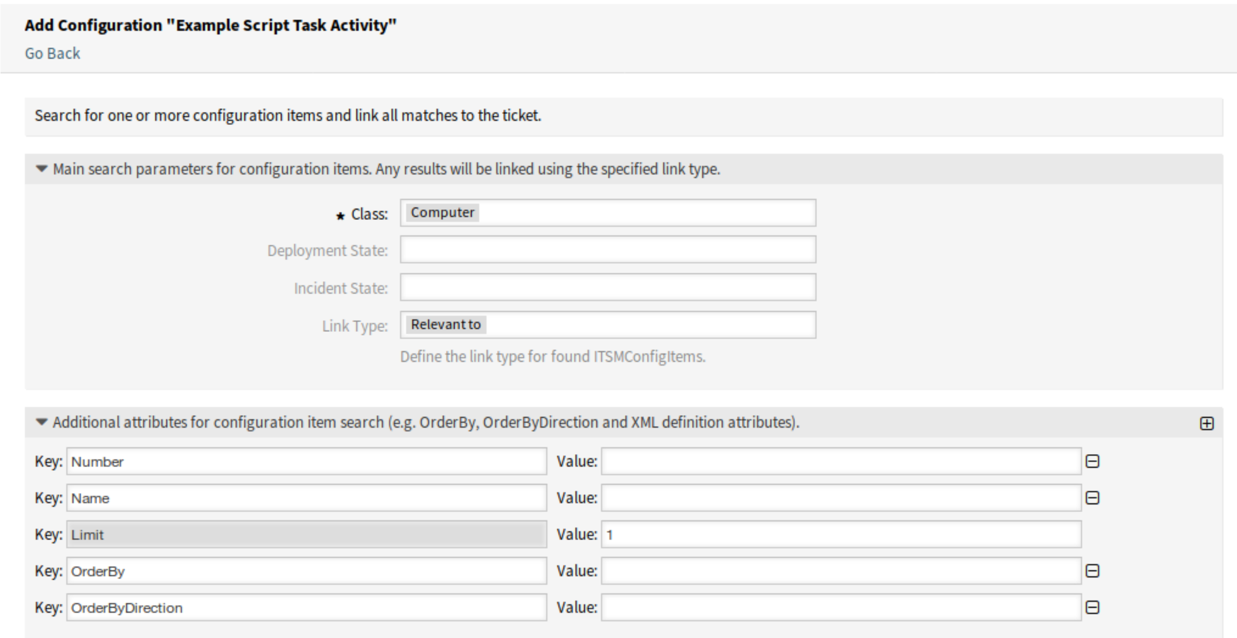


Fig. 2: Configuration Screen for `TicketLinkITSMConfigItem` Script

The following settings are available when adding or editing this resource. The fields marked with an asterisk are mandatory.

The main search parameters can be selected in the first section. The following parameters can be used for restrictions:

- Class *
- Deployment State
- Incident State
- Link Type

Additional search parameters can be set as key-value pairs in the second section. Some keys are added by default.

`TicketUpdateByLinkedCI`

This script copies all specified attributes of a linked configuration item to the ticket.

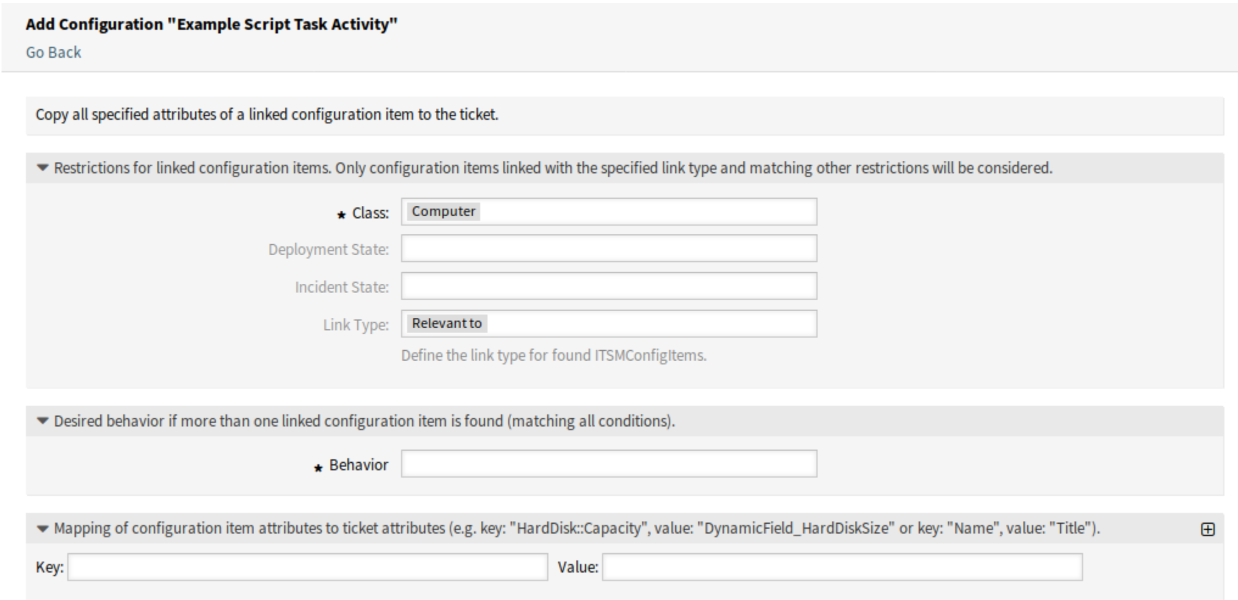


Fig. 3: Configuration Screen for `TicketUpdateByLinkedCI` Script

The following settings are available when adding or editing this resource. The fields marked with an asterisk are mandatory.

The main search parameters can be selected in the first section. The following parameters can be used for restrictions:

- Class *
- Deployment State
- Incident State
- Link Type

Behavior * Desired behavior if more than one linked configuration item is found (matching all conditions).

- Copy attributes from configuration item that was linked first.
- Copy attributes from configuration item that was linked last.
- Ignore configuration item, do not copy anything.

The third section is used for mapping of configuration item attributes (keys) to ticket attributes (values).

5.1.2.2 Web Services

This package adds some new operations for creating, changing, retrieving, deleting and searching configuration items via generic interface. The following operations are available:

- `ConfigItemCreate()`
- `ConfigItemDelete()`

- `ConfigItemGet()`
- `ConfigItemSearch()`
- `ConfigItemUpdate()`

See also:

For more information please take a look at the WSDL file located in `development/webservices/GenericConfigItemConnectorSOAP.wsdl` of your instance.

New Operations

These new operations are available in the *Web Services* module of the *Processes & Automation* group:

- `ConfigItem::ConfigItemCreate`
- `ConfigItem::ConfigItemDelete`
- `ConfigItem::ConfigItemGet`
- `ConfigItem::ConfigItemSearch`
- `ConfigItem::ConfigItemUpdate`

To use these operations:

1. Add or edit a web service.
2. Select a *Network transport* in the *OTRS as provider* widget and save the web service.
3. The new operations are available in the *Add Operation* field of the *OTRS as provider* widget.

5.1.3 Administration

After installation of the package some new classes will be available in the *General Catalog*.

5.1.3.1 General Catalog

ITSM configuration management adds some new classes to the *General Catalog*. The general catalog management screen is available in the *General Catalog* module of the *Administration* group.

New Classes

ITSM::ConfigItem::Class A class for configuration item classes.

See also:

The class definition of configuration item classes can be managed in the *Config Items* module of the *CMDB Settings* group.

ITSM::ConfigItem::Computer::Type A class for computer types, that can be selected in *CMDB* when adding or editing configuration items of type computer.

ITSM::ConfigItem::DeploymentState A class for deployment states, that can be selected in *CMDB* when adding or editing configuration items.

ITSM::ConfigItem::Hardware::Type A class for hardware types, that can be selected in *CMDB* when adding or editing configuration items of type hardware.

Fig. 4: General Catalog Class List Screen

ITSM::ConfigItem::Location::Type A class for location types, that can be selected in *CMDB* when adding or editing configuration items of type location.

ITSM::ConfigItem::Network::Type A class for network types, that can be selected in *CMDB* when adding or editing configuration items of type network.

ITSM::ConfigItem::Software::LicenceType A class for software license types, that can be selected in *CMDB* when adding or editing configuration items of type software.

ITSM::ConfigItem::Software::Type A class for software types, that can be selected in *CMDB* when adding or editing configuration items of type software.

ITSM::ConfigItem::YesNo This class contains the items *Yes* and *No*.

5.1.4 CMDB Settings

After installation of the package a new group *CMDB Settings* will be available with a new module in the administrator interface.

5.1.4.1 Config Items

Use this screen to manage class definition of configuration item classes. The configuration item class management screen is available in the *Config Items* module of the *CMDB Settings* group.

To add or edit the class definition of a configuration item class:

1. Select a class from the drop-down menu in the left sidebar.
2. Click on the *Change class definition* button.
3. Add or edit the class definition in YAML format.
4. Click on the *Save* or *Save and finish* button.

To see the class definition of a configuration item class:

1. Click on a class name in the list of classes.

Fig. 5: Configuration Item Management Screen

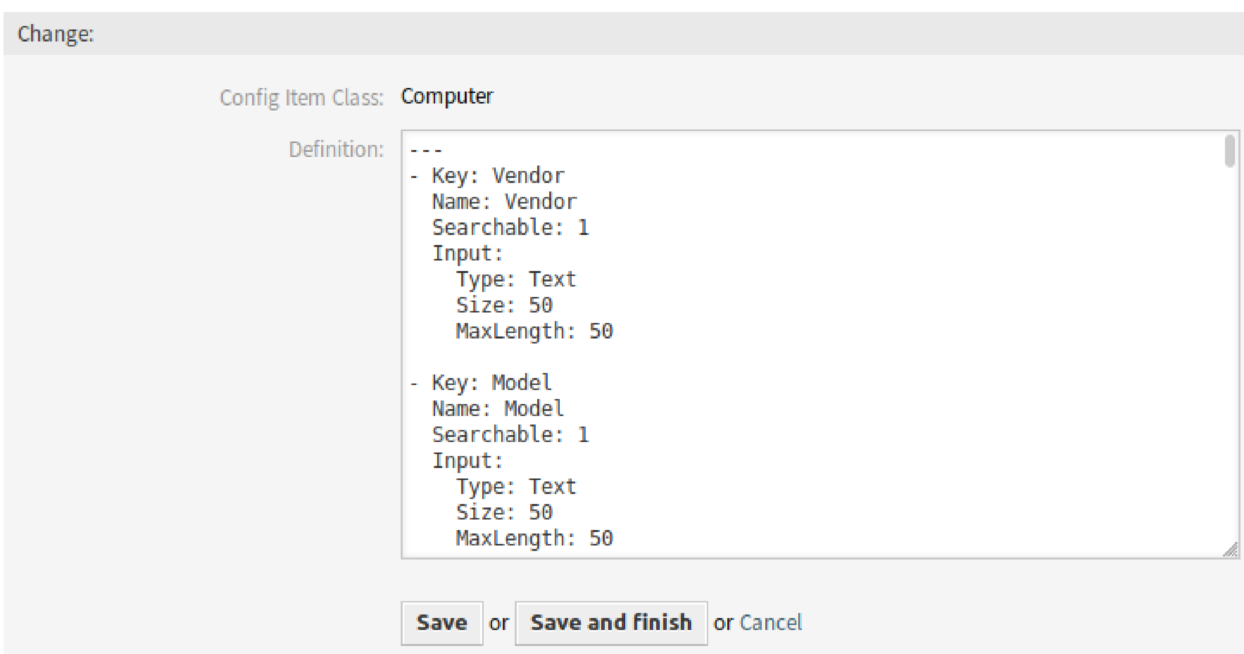


Fig. 6: Edit Configuration Item Class Definition Screen

2. Select a version by clicking on a class name in the list of class versions.

Fig. 7: Configuration Item Class Versions Screen

See also:

New configuration item classes can be added in *General Catalog* module in the administrator interface.

Class Definition Types and Form Elements

Multiple input field types can be used when defining a class. These input field types are used to generate the edit form for creating new or editing already existing configuration items.

Warning: Since version 7.0.7 the configuration item class definitions have to be written in YAML format.

The following block is an example of a form field called *Operating System*.

```
---
- Key: OperatingSystem
  Name: Operating System
  Input:
    Type: Text
    Size: 50
    MaxLength: 100
```

The following settings are available when adding or editing this resource. The fields marked with an asterisk are mandatory.

`Key` * Must be unique and only accept alphabetic and numeric characters. If this is changed, data will not be readable from old definitions.

`Name` * The label of the field in the form. Any type of characters can be entered to this field including uppercase letters and spaces.

Note: It is recommended to always use English words for names.

See also:

Names can be translated into other languages with custom language files. For more information, see the Custom Language File chapter in the administration manual.

`Searchable` Defines whether the field is searchable or not. Possible values are *0* or *1*.

Input * Initiates the definition of the input field. An input field can contain the following attributes:

Type * Defines the type of the element. Must be placed indented as a logical block. Possible values are:

- `Customer`: A drop-down list for select a customer user from the database back end. The field can be used with wildcards (*).
- `CustomerCompany`: A drop-down list for select a customer from the database back end.
- `Date`: A field for select a date.
- `DateTime`: A field for select date and time.
- `Dummy`: This field is used to give the other elements a structure. It has usually `Sub` structures.
- `GeneralCatalog`: A drop-down list for select a general catalog class. The general catalog class must be defined before use it as input type. The items of the general catalog class will be the options of the drop-down list.
- `Integer`: A drop-down list with integer numbers.
- `Text`: A single text field.
- `TextArea`: A text field with multiple rows.

Required Defines whether the field is mandatory or not. Possible values are *0* or *1*.

Size Defines the size of the text field. The value must be a positive integer.

MaxLength Defines the maximum amount of characters that can be entered in the text field. The value must be a positive integer.

RegEx A regular expression to restrict the possible values of the text field.

RegExErrorMessage The displayed error message if the input does not match to definition given in the regular expression.

Class The name of the class to be used for the drop-down list. Required for type `GeneralCatalog`.

Translation Defines whether the items of a general catalog have to be translated. Possible values are: *0* or *1*.

YearPeriodPast Defines how many years in the past are available for selection from the present year in a date or date/time field. The value must be a non-negative integer.

YearPeriodFuture Defines how many years in the future are available for selection from the present year in a date or date/time field. The value must be a non-negative integer.

ValueMin Defines the minimum value for an integer field.

ValueMax Defines the maximum value for an integer field.

ValueDefault Defines the default value for an integer field.

CountMin Defines at least how many of the current input types are available. The value must be a non-negative integer.

CountMax Defines at most how many of the current input types are available. The value must be a non-negative integer.

CountDefault Defines how many field should be displayed by default. The value must be a non-negative integer.

Sub Defines a sub-element in the input field. The sub-element can contain its own input fields. It is useful if you have certain properties under a main property.

SuppressVersionAdd This can be used to suppress creating a new version of a configuration item, when an attribute has changed. Possible values are `UpdateLastVersion` and `Ignore`.

- `UpdateLastVersion`: If this value is set and there is no other updated attribute, the attribute is updated in the current version without creating a new version.
- `Ignore`: If this value is set and there is no other updated attribute, nothing will be done, and no new version is created.

Class Definition Reference

The following class definition is an example for all possible options.

Note: The `CustomerID` and `Owner` are special keys, since these keys are used in *Customer Information Center* and *Customer User Information Center* to assign configuration items automatically to customers and customer users by default.

```
---
- Key: OperatingSystem
  Name: Operating System
  Searchable: 1
  Input:
    Type: Text
    Required: 1
    Size: 50
    MaxLength: 100
    RegEx: Linux|MacOS|Windows|Other
    RegExErrorMessage: The operating system is unknown.
  CountMin: 0
  CountMax: 5
  CountDefault: 1

- Key: Description
  Name: Description
  Searchable: 0
  Input:
    Type: TextArea
    Required: 0
  CountMin: 0
  CountMax: 1
  CountDefault: 0

- Key: Type
  Name: Type
  Searchable: 1
  Input:
    Type: GeneralCatalog
    Class: ITSM::ConfigItem::Software::Type
    Required: 1
    Translation: 1

- Key: CustomerID
```

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```
  Name: Customer Company
  Searchable: 1
  Input:
    Type: CustomerCompany

- Key: Owner
  Name: Owner
  Searchable: 1
  Input:
    Type: Customer

- Key: LicenseKey
  Name: License Key
  Searchable: 1
  Input:
    Type: Text
    Size: 50
    MaxLength: 50
    Required: 1
  CountMin: 0
  CountMax: 100
  CountDefault: 0
  Sub:
  - Key: Quantity
    Name: Quantity
    Input:
      Type: Integer
      ValueMin: 1
      ValueMax: 1000
      ValueDefault: 1
      Required: 1
    CountMin: 0
    CountMax: 1
    CountDefault: 0

  - Key: ExpirationDate
    Name: Expiration Date
    Input:
      Type: Date
      Required: 1
      YearPeriodPast: 20
      YearPeriodFuture: 10
    CountMin: 0
    CountMax: 1
    CountDefault: 0

- Key: LastUsed
  Name: Last Used
  Input:
    Type: DateTime
    Required: 1
  CountMin: 0
```


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```
CountMax: 1
CountDefault: 0
SuppressVersionAdd: UpdateLastVersion
```

5.2 Agent Interface

This chapter describes the new features that are available in the agent interface after installation of the package.

5.2.1 Customers

After installation of the package a new widget will be available in the *Customer Information Center* and *Customer User Information Center*.

5.2.1.1 Customer Information Center

After installation of the package a new widget named *Assigned CIs* will be available in the *Customer Information Center*.

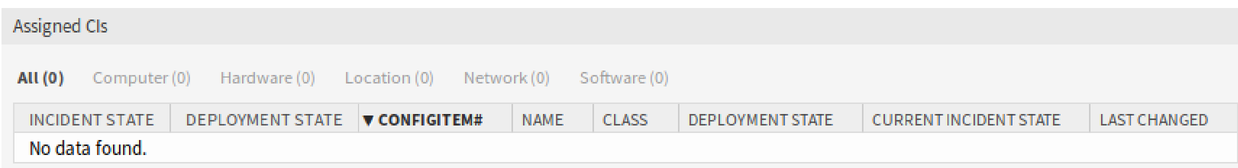


Fig. 8: Assigned CIs Widget

This widget displays the configuration items that are assigned to the customer.

Configuration items can be filtered by clicking on a class name in the header of the overview widget. There is an option *All* to see all configuration items. The numbers after the class names indicates how many configuration items are in each classes.

The assignment is done via attribute `CustomerID` by default. If the configuration item uses different attribute for linking, you should change it in the system configuration settings.

See also:

See `AgentCustomerInformationCenter::Backend###0060-CIC-ITSMConfigItemCustomerCompany` system configuration setting for more information.

The default setting is:

```
ConfigItemKey → Computer → CustomerID
                Hardware → CustomerID
                Location → CustomerID
                Network  → CustomerID
                Software → CustomerID
```

You also need to have this `CustomerID` attribute in the class definition to display the assigned configuration items. Check the existing class definitions in the *Config Items* module.

If your class definition doesn't contain the `CustomerID` attribute, then you have to add it manually.

```
- Key: CustomerID
  Name: Customer Company
  Searchable: 1
  Input:
    Type: CustomerCompany
```

5.2.1.2 Customer User Information Center

After installation of the package a new widget named *Assigned CIs* will be available in the *Customer User Information Center*.

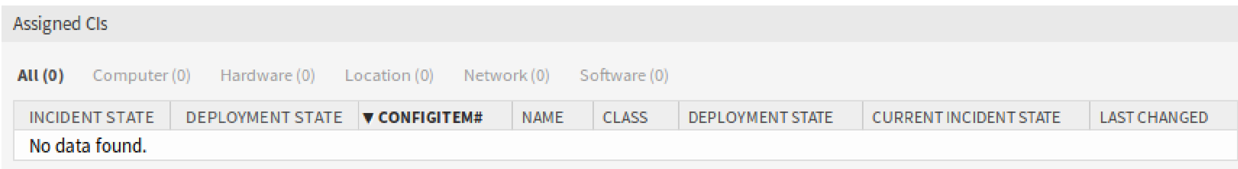


Fig. 9: Assigned CIs Widget

This widget displays the configuration items that have this customer user as owner.

Configuration items can be filtered by clicking on a class name in the header of the overview widget. There is an option *All* to see all configuration items. The numbers after the class names indicates how many configuration items are in each classes.

The assignment is done via attribute `Owner` by default. If the configuration item uses different attribute for linking, you should change it in the system configuration settings.

See also:

See `AgentCustomerUserInformationCenter::Backend###0060-CUIC-ITSMConfigItemCustomerUser` system configuration setting for more information.

The default setting is:

```
ConfigItemKey → Computer → Owner
                Hardware → Owner
                Location → Owner
                Network  → Owner
                Software → Owner
```

You also need to have this `Owner` attribute in the class definition to display the assigned configuration items. Check the existing class definitions in the *Config Items* module.

If your class definition doesn't contain the `Owner` attribute, then you have to add it manually.

```
- Key: Owner
  Name: Owner
  Searchable: 1
  Input:
    Type: Customer
```

5.2.2 CMDB

After installation of the package a new menu will be available in the agent interface.

Note: In order to grant users access to the *CMDB* menu, you need to add them as member to the group *itsm-configitem*.

The menu items that were added by this package will be visible after you log-in to the system again.

5.2.2.1 Overview

This screen gives an overview of configuration items. Configuration items have an *Incident State* column, which includes two state types:

- Operational
- Incident

For each state type, any number of states can be registered. The state of a configuration item affects the service state, which will be dynamically calculated and displayed in the *Service* screen of the agent interface.

See also:

To enable the dynamic calculation, activate the following system configuration settings:

- `ITSMConfigItem::SetIncidentStateOnLink`
- `ITSMConfigItem::LinkStatus::TicketTypes`

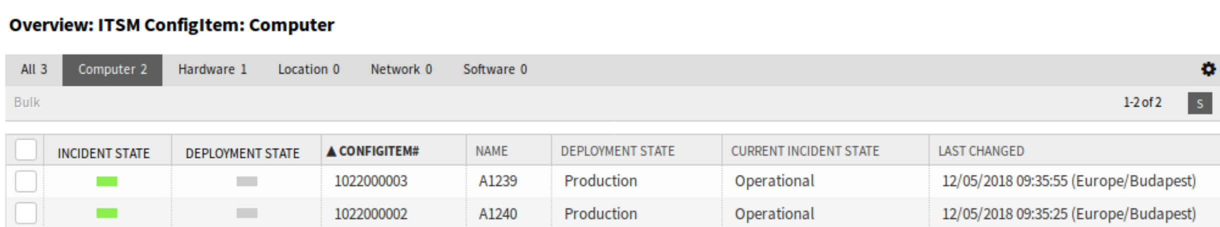


Fig. 10: ITSM Configuration Item Overview Screen

Configuration items can be filtered by clicking on a class name in the header of the overview widget. There is an option *All* to see all configuration items. The numbers after the class names indicates how many configuration items are in each classes.

To limit the number of displayed configuration items per page:

1. Click on the gear icon in the top right corner of the overview header.
2. Select the maximum number of configuration items displayed per page.
3. Click on the *Submit* button.

To see the details of a configuration item:

1. Click on the row of a configuration item.

The *Configuration Item Zoom* screen has an own menu.

Back This menu item goes back to the previous screen.

History This menu item opens a new window to see the history of the configuration item.

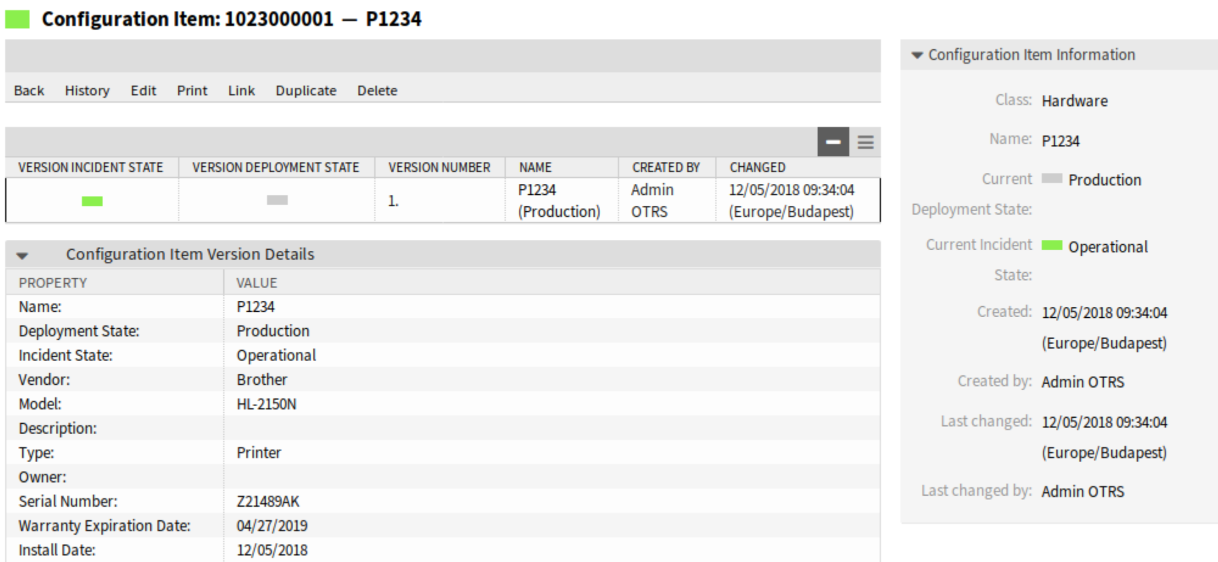


Fig. 11: ITSM Configuration Item Zoom Screen

Fig. 12: ITSM Configuration Item History Screen

Edit This menu item opens a new window to edit the configuration item.

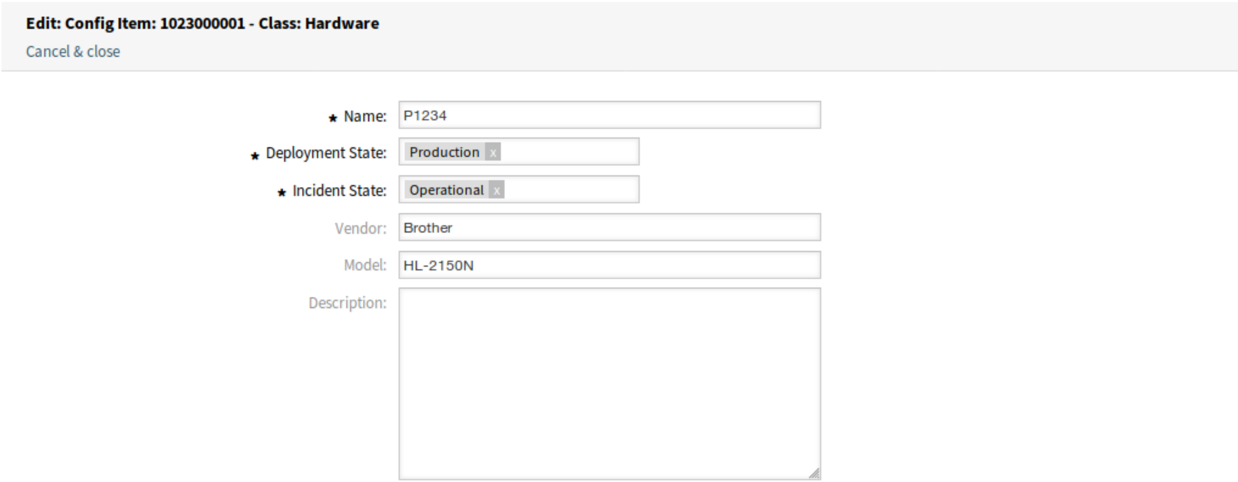


Fig. 13: Edit ITSM Configuration Item Screen

Print This menu item opens a PDF file to show the printer friendly version of the screen. You can save or print this PDF file.

Link This menu item opens the standard link screen of OTRS. Configuration items can be linked to any other objects like FAQ articles, services, tickets or configuration items. Existing links can also be managed here.

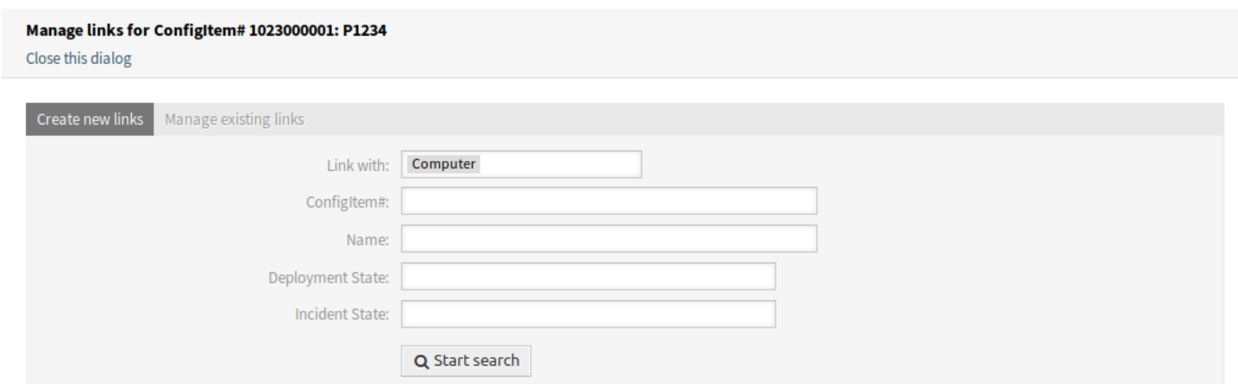


Fig. 14: Link ITSM Configuration Item Screen

Duplicate This menu item opens a new window to duplicate the configuration item. This screen is the same as the edit screen, but clicking the *Save* button will create a new configuration item instead of modify the current one.

Delete This menu item opens a modal dialog to confirm the deletion of configuration item.

5.2.2.2 New

Use this screen to add new configuration items to the configuration management database.

To add a configuration item:

1. Select a class from the list of classes.

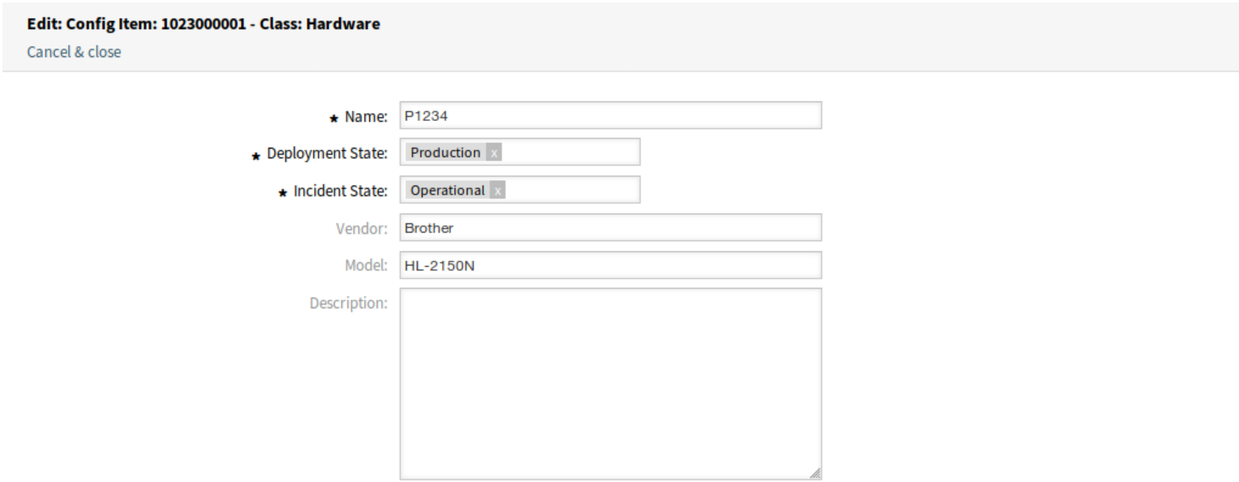


Fig. 15: Duplicate ITSM Configuration Item Screen

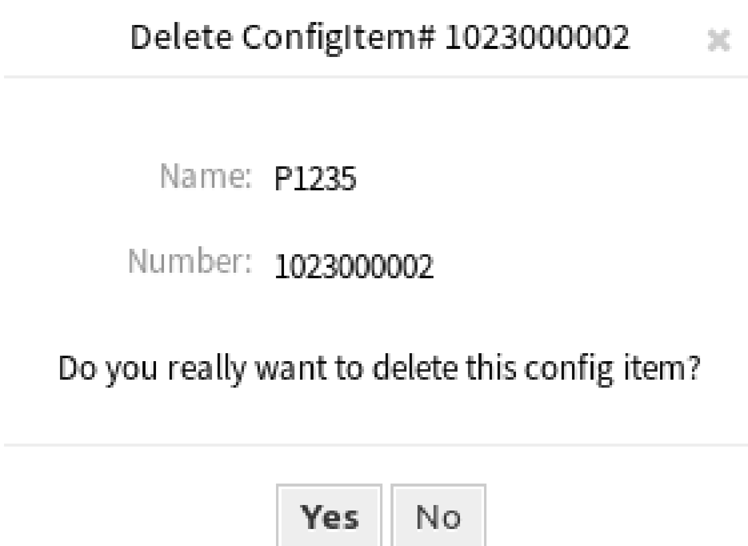


Fig. 16: Delete ITSM Configuration Item Screen

Fig. 17: Add Configuration Item Screen

2. Fill in the required fields.
3. Click on the *Save* button.

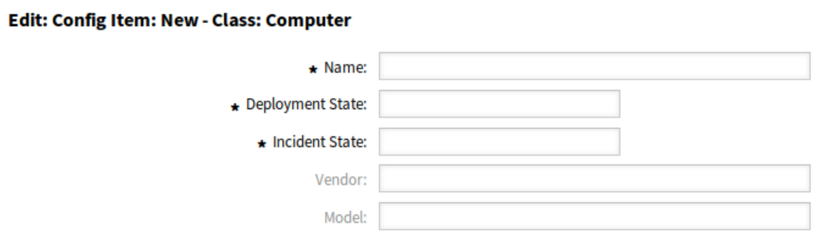


Fig. 18: Add Configuration Item To Class Computer

See also:

The fields in the *Add Configuration Item Screen* can be very different on each classes. To see the available fields, check the *Config Items* module in the administrator interface.

Warning: The maximum number of 20,000 configuration items should not be exceeded. Exceeding this limit may affect the system performance.

5.2.2.3 Search

Use this screen to search for configuration items.

To search for configuration items:

1. Click on the *Search* menu item in the *CMDB* menu.
2. Select a class from the drop-down field.
3. Fill in the required fields.
4. Click on the *Run Search* button.
5. See the search result.

5.3 External Interface

This package has no external interface.

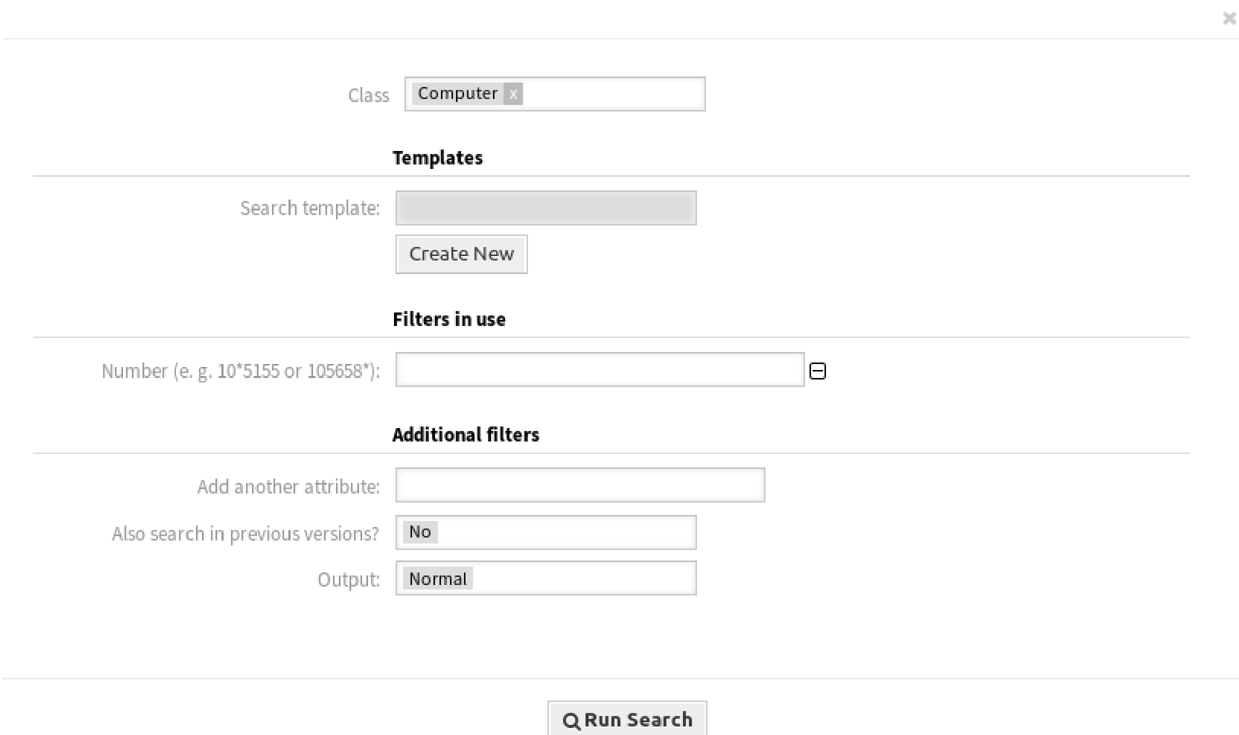


Fig. 19: ITSM Configuration Item Database Search Screen

CHAPTER 6

ITSM Incident Problem Management

The service desk (which, according to ITIL, is not a process but a function) is usually the ticket system's main field of application. All user messages and notifications from system monitoring and internal IT organization converge here. The ITIL service management process, closely interwoven with the service desk, describes which work steps, information, escalations and/or interfaces are relevant in connection with the processing of incidents or service requests.

The incident and problem management processes within OTRS::ITSM are based on ITIL recommendations and ITIL terminology. At the same time, user comfort was a main consideration, and terms known from OTRS have been retained as much as possible.

Note: This package requires the *General Catalog* and the *ITSM Core* features.

6.1 Administrator Interface

This chapter describes the new features that are available in the administrator interface after installation of the package.

6.1.1 Ticket Settings

After installation of the package a new state is added to the ticket states and some new types are added to ticket types.

6.1.1.1 States

After installation of the package a new state is added to the system. The state management screen is available in the *States* module of the *Ticket Settings* group.

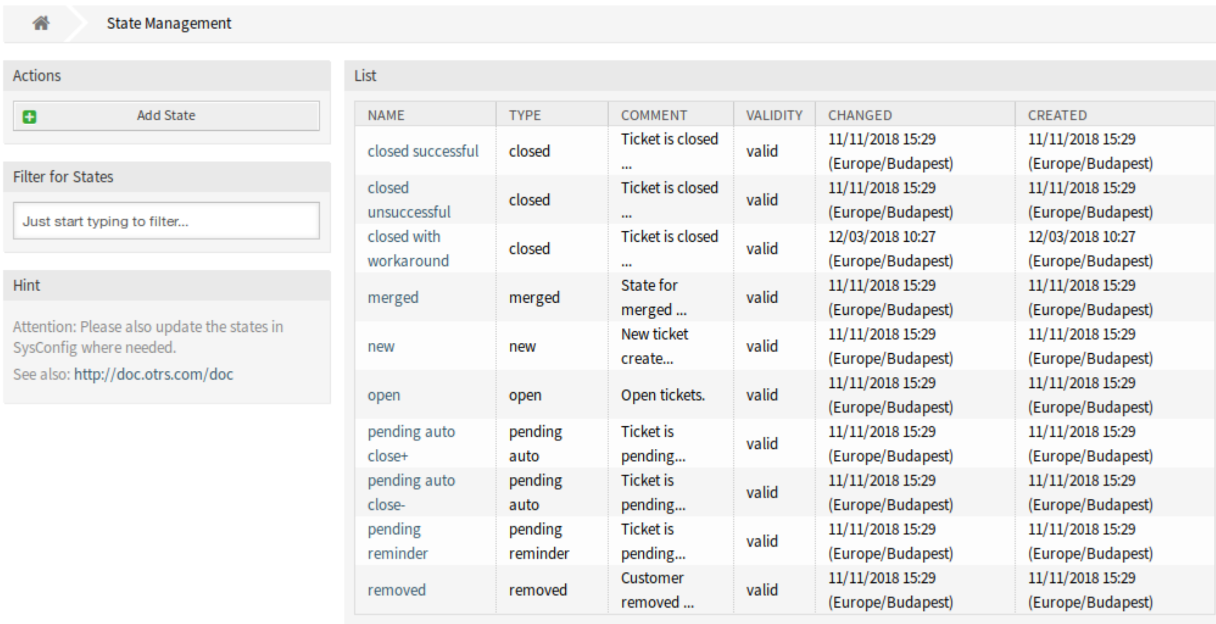


Fig. 1: State Management Screen

New State

closed with workaround This end state is for tickets, that are closed successfully, but with a workaround.

6.1.1.2 Types

After installation of the package some new types are added to the system. The type management screen is available in the *Types* module of the *Ticket Settings* group.

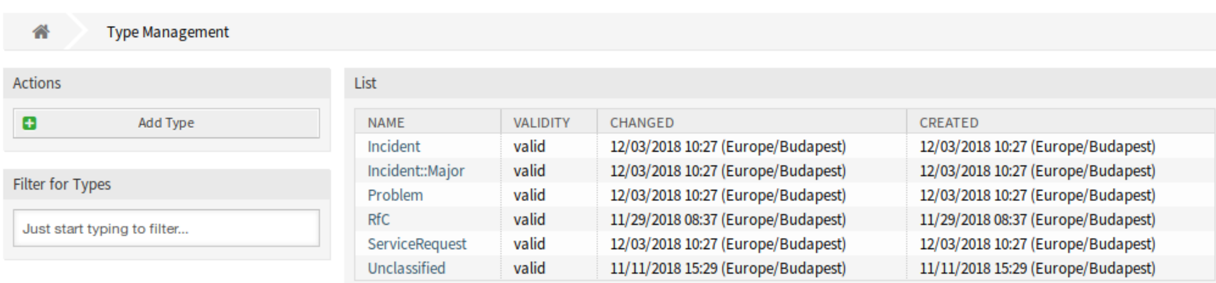


Fig. 2: Type Management Screen

New Types

`Incident` For tickets that are created for normal incidents.

`Incident::Major` For tickets that are created for major incidents.

Problem For tickets that are created for problems.

ServiceRequest For tickets that are created for service requests.

6.1.2 Processes & Automation

After installation of the package some new dynamic fields are added to the system and activated on screens.

6.1.2.1 Dynamic Fields

After installation of the package some new dynamic fields are added to the system. The dynamic field management screen is available in the *Dynamic Fields* module of the *Processes & Automation* group.

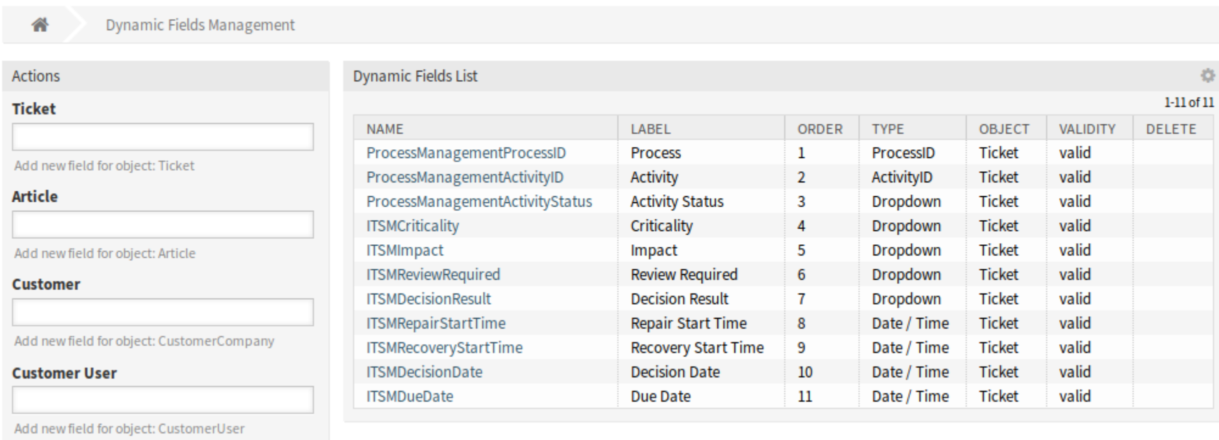


Fig. 3: Dynamic Field Management Screen

New Dynamic Fields

ITSMReviewRequired This is a drop-down dynamic field that contains *Yes* and *No* to indicate if a review is required.

ITSMDecisionResult This is a drop-down dynamic field that contains some possible results for decisions.

ITSMRepairStartTime This is a date/time dynamic field for holding the repair start time.

ITSMRecoveryStartTime This is a date/time dynamic field for holding the recovery start time.

ITSMDecisionDate This is a date/time dynamic field for holding the decision time.

ITSMDueDate This is a date/time dynamic field for holding the due date.

The new dynamic fields are activated in many screens by default.

To see the complete list of screens:

1. Go to the system configuration.
2. Filter the settings for `ITSMIncidentProblemManagement` group.
3. Navigate to `Frontend` → `Agent` → `View` or `Frontend` → `External` → `View` to see the screens.

6.2 Agent Interface

This chapter describes the new features that are available in the agent interface after installation of the package.

6.2.1 Tickets

After installation of the package some new fields will be available in the ticket screens.

6.2.1.1 Status View

After installation of the package some new fields will be available in the *Status View* screen.

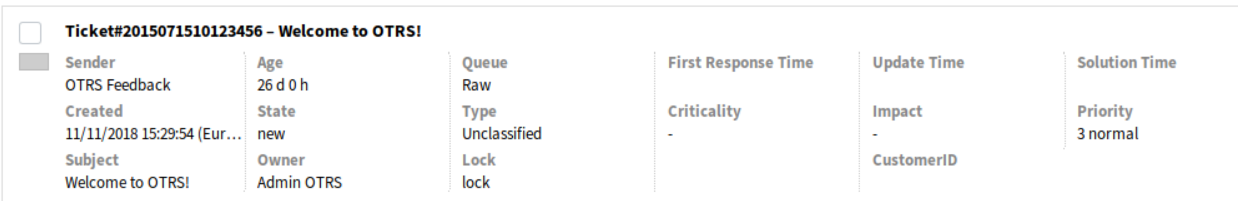


Fig. 4: Ticket Status View Screen

Some new dynamic fields are also displayed in this view.

6.2.1.2 New Email Ticket

After installation of the package some new fields will be available in the *New Email Ticket* screen.

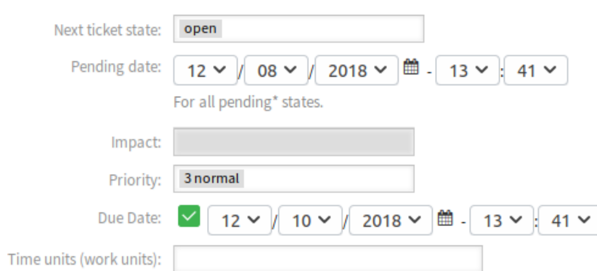


Fig. 5: New Email Ticket Screen

New Fields

Impact Select the impact level from *1 very low* to *5 very high*.

Due Date Select a date as due date for the new ticket.

6.2.1.3 New Phone Ticket

After installation of the package some new fields will be available in the *New Phone Ticket* screen.

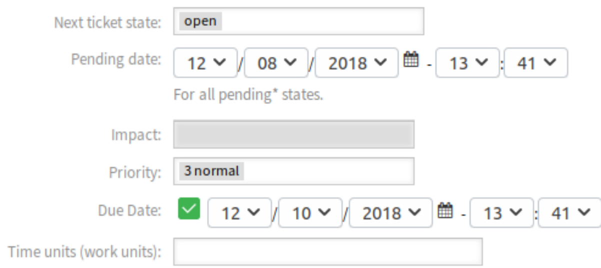


Fig. 6: New Phone Ticket Screen

New Fields

Impact Select the impact level from *1 very low* to *5 very high*.

Due Date Select a date as due date for the new ticket.

6.2.1.4 Search

After installation of the package some new attributes are added to the *Ticket Search* screen.

To see the new attributes:

1. Open the *Search* menu item from the *Tickets* menu.
2. Click on the *Add another attribute* filed.
3. Scroll down the list and check the available attributes.

The new attributes are:

- Impact
- Review Required
- Decision Result
- Repair Start Time (before/after)
- Repair Start Time (between)
- Recovery Start Time (before/after)
- Recovery Start Time (between)
- Decision Date (before/after)
- Decision Date (between)
- Due Date (before/after)
- Due Date (between)

6.2.1.5 Ticket Zoom

After installation of the package many new dynamic fields will be available in the *Ticket Zoom* screen and in its child windows. Additionally, two new menu items are added to the ticket menu.

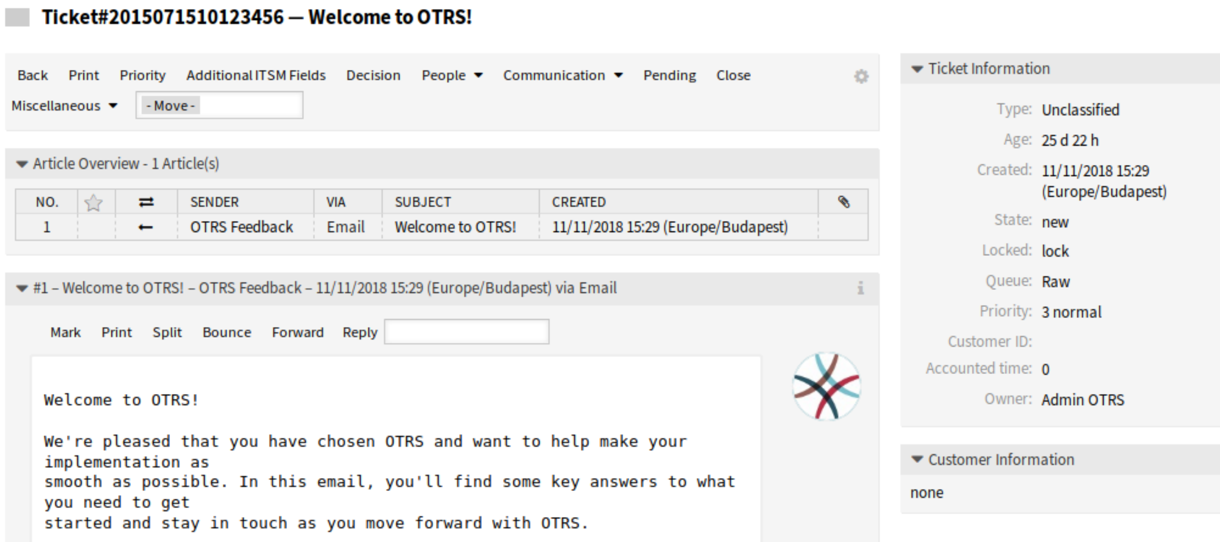


Fig. 7: Ticket Zoom Screen

Priority

After installation of the package a new field is added to this window.

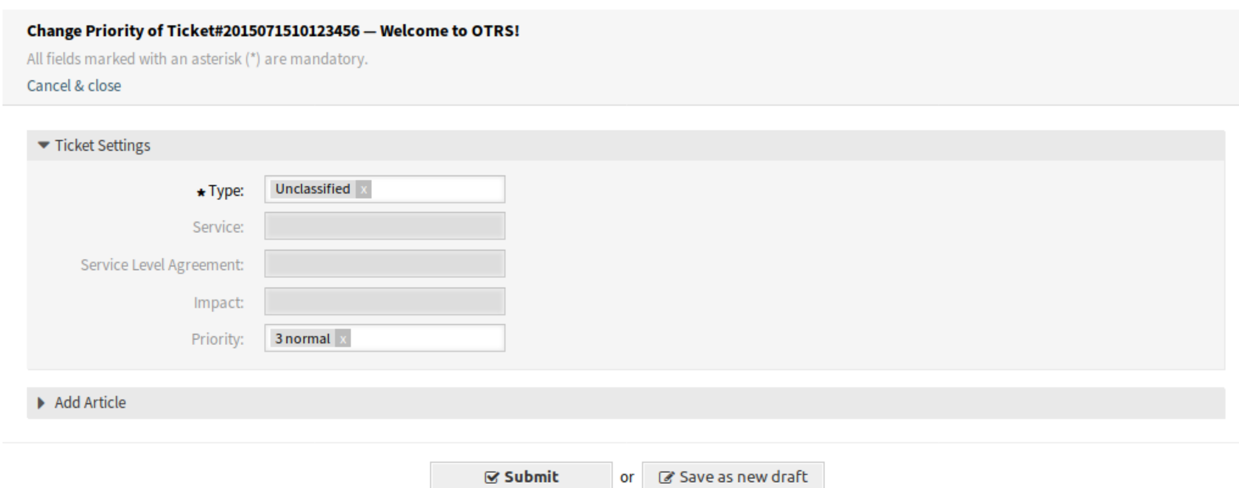


Fig. 8: Ticket Priority Window

Impact Select the impact level from *1 very low* to *5 very high*.

It is possible to add an article to the ticket if the action needs to be explained more detailed.

Additional ITSM Fields

After installation of the package a new menu item *Additional ITSM Fields* is displayed in the ticket menu. Clicking on this menu item will open a new window.

In this window the additional ITSM fields can be set regarding to repair and recovery start time, as well as the due date.

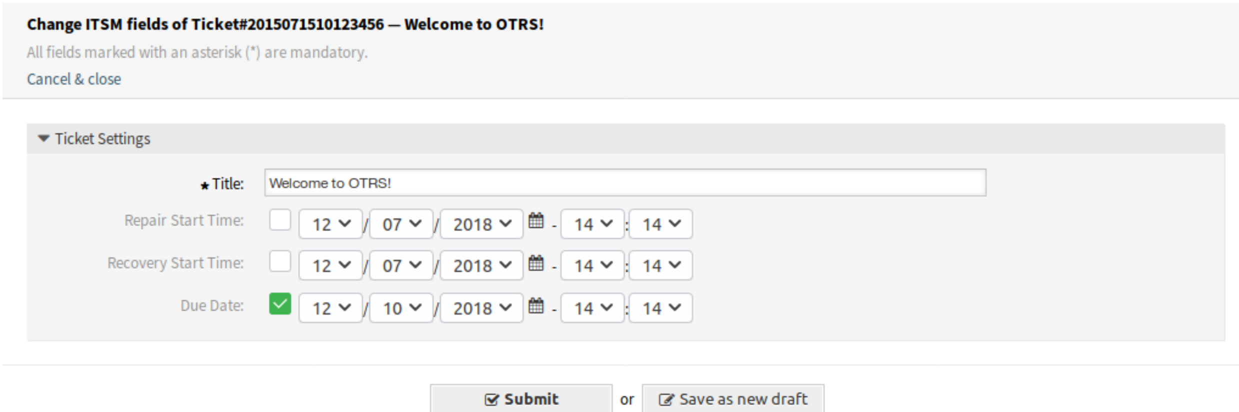


Fig. 9: Additional ITSM Fields Window

Title * This is the title of the ticket.

Repair Start Time Select the date and time when the problem started to be repaired.

Recovery Start Time Select the date and time when the recovery of the problem started.

Due Date Select the date and time as due date for the ticket.

Decision

After installation of the package a new menu item *Decision* is displayed in the ticket menu. Clicking on this menu item will open a new window.

In this window the decision result and the decision date can be set.

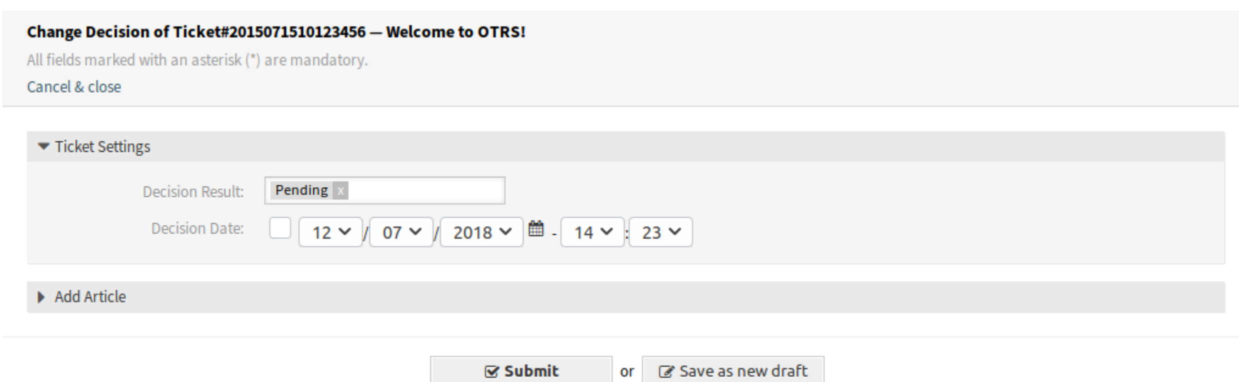


Fig. 10: Ticket Decision Window

Decision Result Select a possible result for the decision. The available decision results can be set as *Dynamic Fields*.

Decision Date Select the date and time when the decision was made.

It is possible to add an article to the ticket if the action needs to be explained more detailed.

Close

After installation of the package a new field is added to this window.

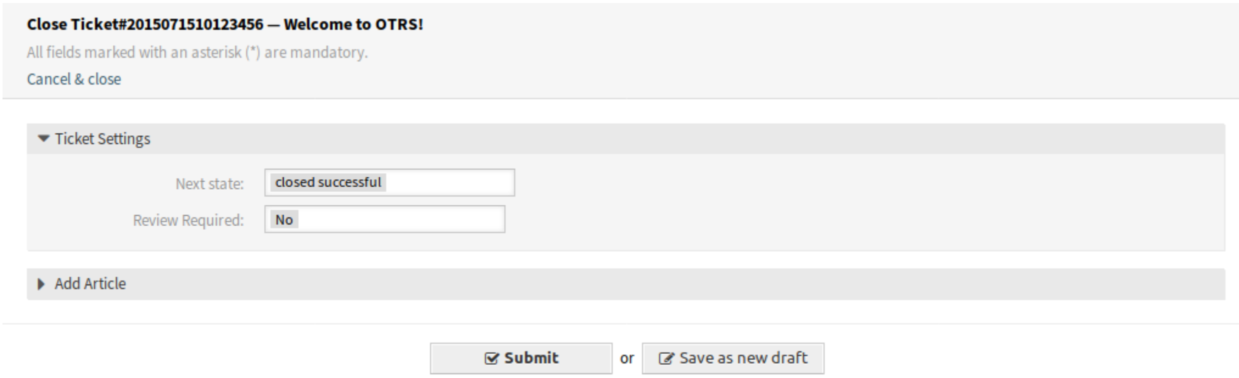


Fig. 11: Ticket Close Window

Review Required Select if a review is required after the ticket close.

It is possible to add an article to the ticket if the action needs to be explained more detailed.

Free Fields

After installation of the package a new field is added to this window.

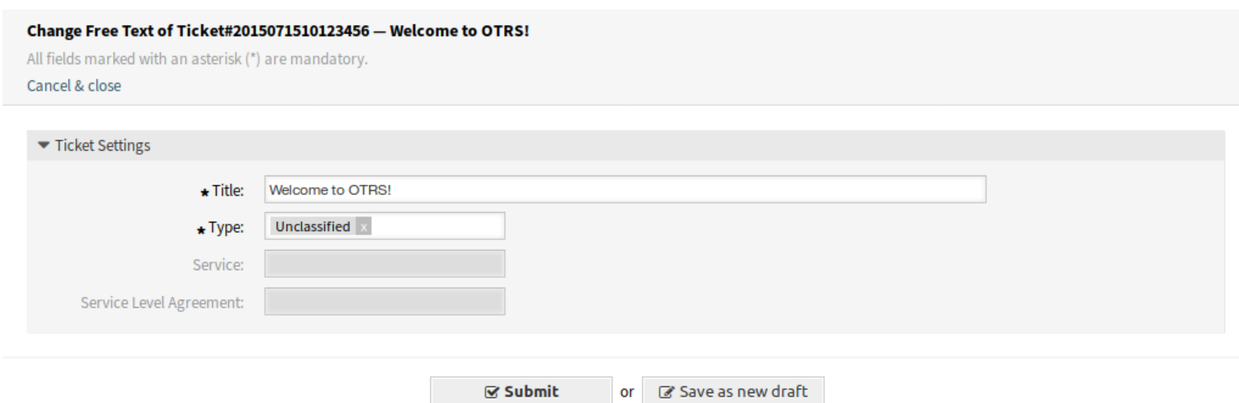


Fig. 12: Ticket Free Fields Window

Type Select a type for the ticket.

See also:

To remove this field, disable this system configuration setting:

- `Ticket::Frontend::AgentTicketFreeText###TicketType`

Ticket Compose

After installation of the package a new field is added to this window.

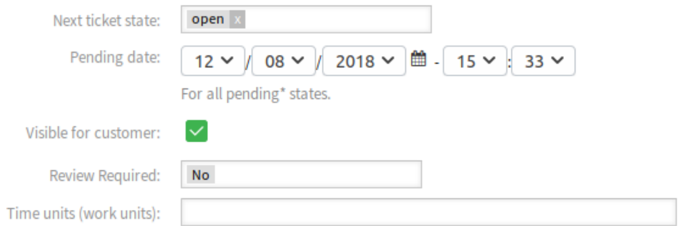


Fig. 13: Ticket Compose Window

Review Required Select if a review is required after the ticket compose.

6.3 External Interface

This package has no external interface.

CHAPTER 7

ITSM Service Level Management

This package adds new statistics to the system for ensuring that all service level agreements are appropriate and satisfy the agreements, as well as to monitor and report on service levels.

Note: This package requires the *General Catalog* and the *ITSM Core* features.

7.1 Administrator Interface

This package has no administrator interface.

7.2 Agent Interface

This chapter describes the new features that are available in the agent interface after installation of the package.

7.2.1 Reports

After installation of the package some new statistics will be available in the agent interface.

7.2.1.1 Statistics

After installation of the package some new statistics are added to the system. The statistic management screen is available in the *Statistics* menu item of the *Reports* menu.

Statistics

1-27 of 27

▲ STAT#	TITLE	OBJECT	EXPORT	DELETE	RUN
10001	List of tickets closed last month	Ticketlist			
10002	New Tickets	TicketAccumulation			
10003	List of open tickets, sorted by time left until response deadline expires	Ticketlist			
10004	List of tickets closed, sorted by response time.	Ticketlist			
10005	List of tickets created last month	Ticketlist			
10006	List of the most time-consuming tickets	Ticketlist			
10007	List of open tickets, sorted by time left until escalation deadline expires	Ticketlist			
10008	List of tickets closed, sorted by solution time	Ticketlist			
10009	Overview about all tickets in the system	TicketAccumulation			
10010	List of open tickets, sorted by time left until solution deadline expires	Ticketlist			
10011	Changes of status in a monthly overview	StateAction			
10012	Total number of all tickets ever created per Ticket-Type and Priority	TicketAccumulation			
10013	Total number of all tickets ever created per Ticket-Type and State	TicketAccumulation			
10014	Total number of all tickets ever created per Ticket-Type and Queue	TicketAccumulation			
10015	Total number of all tickets ever created per Ticket-Type and Service	TicketAccumulation			
10016	Monthly overview of all tickets created in the last month per Ticket-Type	TicketAccumulation			
10017	Monthly overview of all tickets created in the last month per Priority	TicketAccumulation			
10018	Monthly overview of all tickets created in the last month per State	TicketAccumulation			
10019	Monthly overview of all tickets created in the last month per Queue	TicketAccumulation			
10020	Monthly overview of all tickets created in the last month per Service	TicketAccumulation			
10021	Number of tickets created in a specific time period per Ticket-Type and Priority	TicketAccumulation			
10022	Number of tickets created in a specific time period per Ticket-Type and State	TicketAccumulation			
10023	Number of tickets created in a specific time period per Ticket-Type and Queue	TicketAccumulation			
10024	Number of tickets created in a specific time period per Ticket-Type and Service	TicketAccumulation			
10025	Number of currently open tickets per Ticket-Type and Priority	TicketAccumulation			
10026	Number of currently open tickets per Ticket-Type and Queue	TicketAccumulation			
10027	Number of currently open tickets per Ticket-Type and Service	TicketAccumulation			

Fig. 1: Statistics Overview Screen

New Statistics

The following statistics are added to the system:

```
Total number of all tickets ever created per Ticket-Type and Priority
Total number of all tickets ever created per Ticket-Type and State
Total number of all tickets ever created per Ticket-Type and Queue
Total number of all tickets ever created per Ticket-Type and Service
Monthly overview of all tickets created in the last month per Ticket-Type
Monthly overview of all tickets created in the last month per Priority
Monthly overview of all tickets created in the last month per State
Monthly overview of all tickets created in the last month per Queue
Monthly overview of all tickets created in the last month per Service
Number of tickets created in a specific time period per Ticket-Type and␣
↪Priority
Number of tickets created in a specific time period per Ticket-Type and State
Number of tickets created in a specific time period per Ticket-Type and Queue
Number of tickets created in a specific time period per Ticket-Type and Service
Number of currently open tickets per Ticket-Type and Priority
Number of currently open tickets per Ticket-Type and Queue
Number of currently open tickets per Ticket-Type and Service
```

7.3 External Interface

This package has no external interface.

CHAPTER 8

Import/Export

This package provides a tool to import and export configuration items in the CSV format.

Note: This package requires the *ITSM Configuration Management* feature or any other package that provides back end for objects to be imported and exported.

8.1 Administrator Interface

This chapter describes the new features that are available in the administrator interface after installation of the package.

8.1.1 Administration

After installation of the package a new module will be available in the administrator interface.

8.1.1.1 Import/Export

Use this screen to create import and export templates. The import/export template management screen is available in the *Import/Export* module of the *Administration* group.

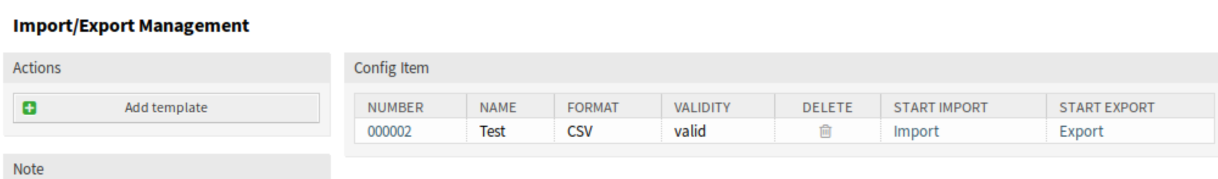


Fig. 1: Import/Export Template Management Screen

Manage Import/Export Templates

To create a new template:

1. Click on the *Add Template* button in the left sidebar.
2. Fill in the required fields in all steps.
3. Click on the *Finish* button.

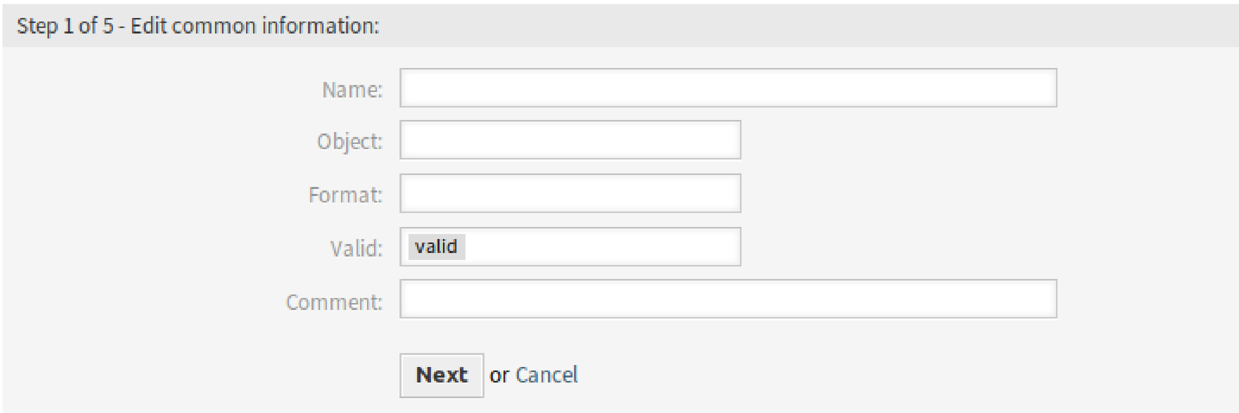


Fig. 2: Create New Import/Export Template Screen

To edit a template:

1. Click on a template in the list of templates.
2. Modify the fields in all steps.
3. Click on the *Finish* button.

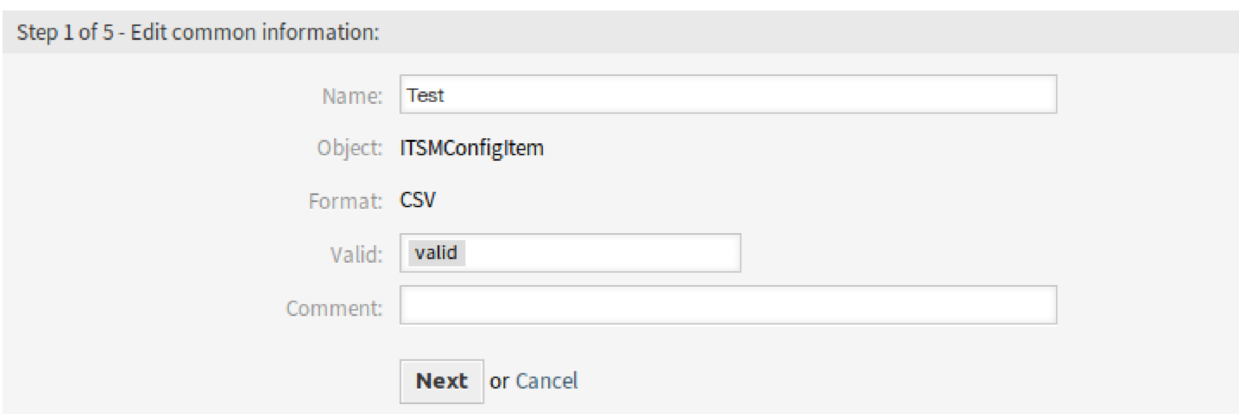


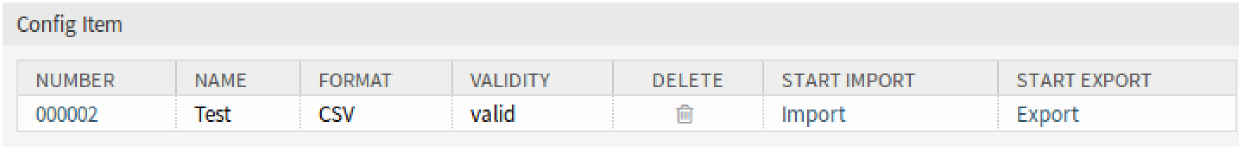
Fig. 3: Edit Import/Export Template Screen

To delete a template:

1. Click on the trash icon in the list of templates.
2. Click on the *Confirm* button.

To import data based on a template:

1. Click on the *Import* link in the list of templates.


Config Item

NUMBER	NAME	FORMAT	VALIDITY	DELETE	START IMPORT	START EXPORT
000002	Test	CSV	valid		Import	Export

Fig. 4: Delete Import/Export Template Screen

2. Click on the *Browse…* button and select a CSV file.
3. Click on the *Start Import* button.

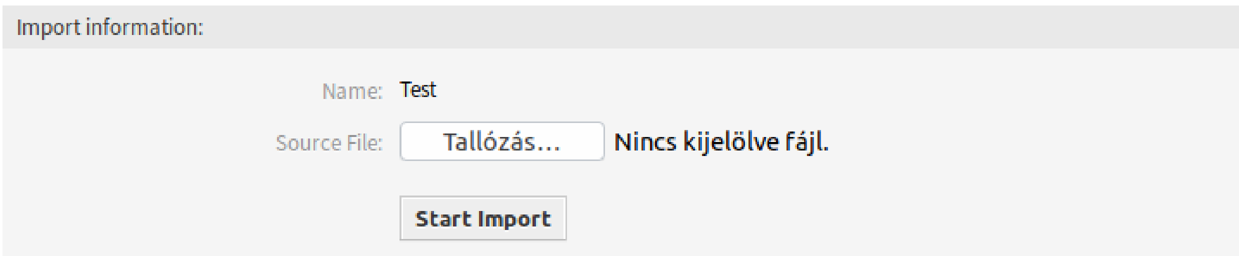


Fig. 5: Import Data Screen

To export data based on a template:

1. Click on the *Export* link in the list of templates.
2. Choose a location in your computer to save the `Export.csv` file.

Import/Export Template Settings

The following settings are available when adding this resource. The fields marked with an asterisk are mandatory.

Note: Import/Export package is meant to be independent. This means, that the following settings can be different if no configuration items will be imported or exported.

Edit Common Information

Name * The name of this resource. Any type of characters can be entered to this field including uppercase letters and spaces. The name will be displayed in the overview table.

Object * Select the object type you want to import to or export from.

Format * Select the import and export format.

Validity * Set the validity of this resource. Each resource can be used in OTRS only, if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the resource.

Comment Add additional information to this resource. It is recommended to always fill this field as a description of the resource with a full sentence for better clarity.

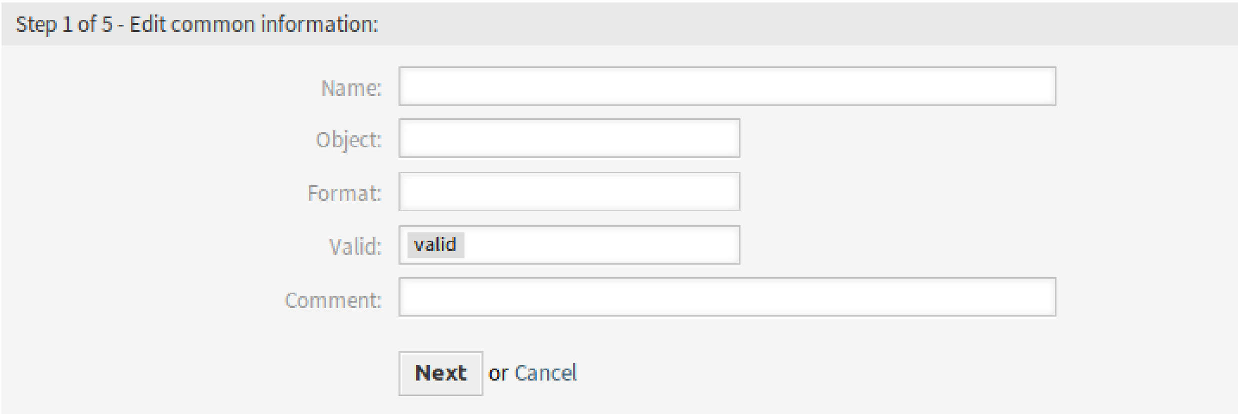


Fig. 6: Edit Common Information Screen

Edit Object Information

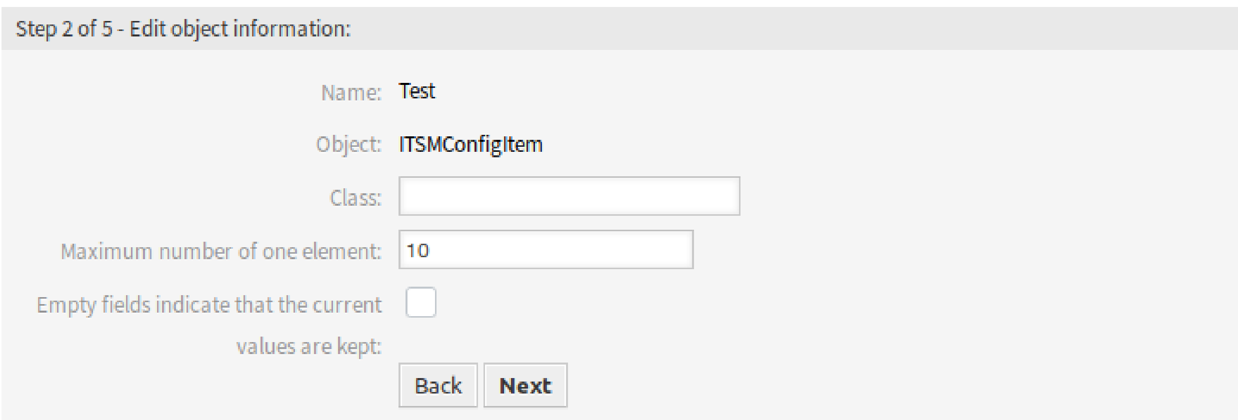


Fig. 7: Edit Object Information Screen

Name This is a read only field from the previous step. Use the *Back* button to edit it.

Object This is a read only field from the previous step. Use the *Back* button to edit it.

Class * Select the class that is needed to be affected by the import and export.

Maximum number of one element * Specify the maximum number of columns per array attribute that can be mapped when mapping the import from or export to the CSV file.

Empty fields indicate that the current values are kept Select this checkbox if the empty field should keep the data in OTRS. Otherwise the data will be overwritten with blank value.

Edit Format Information

Name This is a read only field from the previous step. Use the *Back* button to edit it.

Format This is a read only field from the previous step. Use the *Back* button to edit it.

Column Separator * Select a column separator for CSV file.

Charset Select a character encoding for the CSV file.

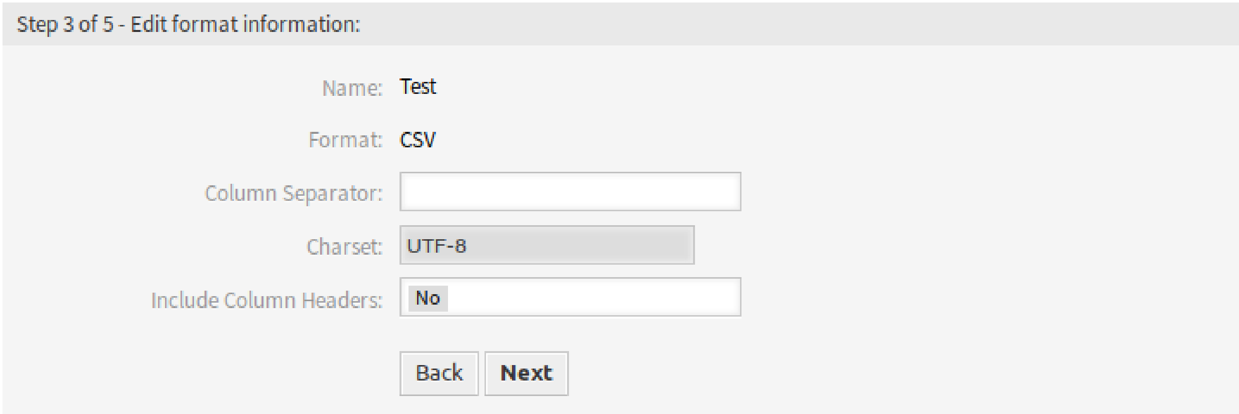


Fig. 8: Edit Format Information Screen

Include Column Headers Specify if column headers should be included or not.

Edit Mapping Information

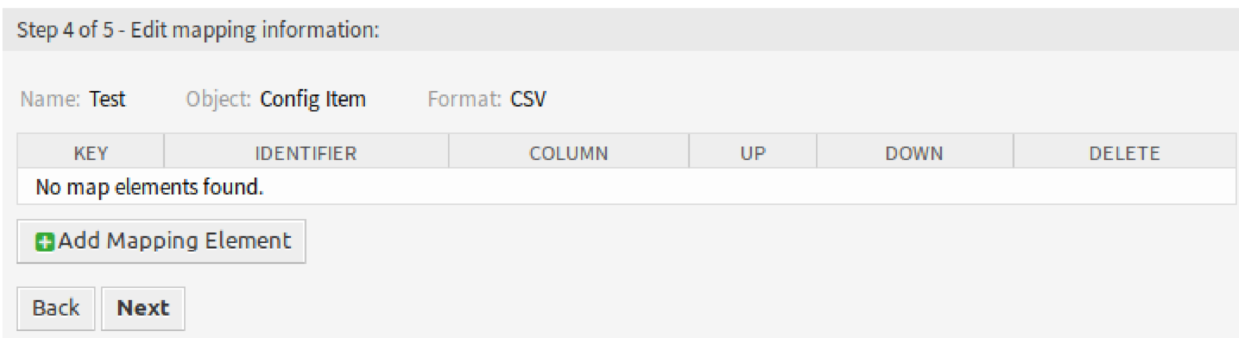


Fig. 9: Edit Mapping Information Screen

Click on the *Add Mapping Element* button to add element from the class. You can also specify if this element is an identifier. The order of the elements is sortable.

Edit Search Information

Template Name This is a read only field from the previous step. Use the *Back* button to edit it.

Restrict export per search You can add search term for each attribute of the selected class to restrict the import and export functions. The possible fields are listed below this field.

Note: The other fields come from the back end driver, and can be different depending on the used object to be imported or exported.

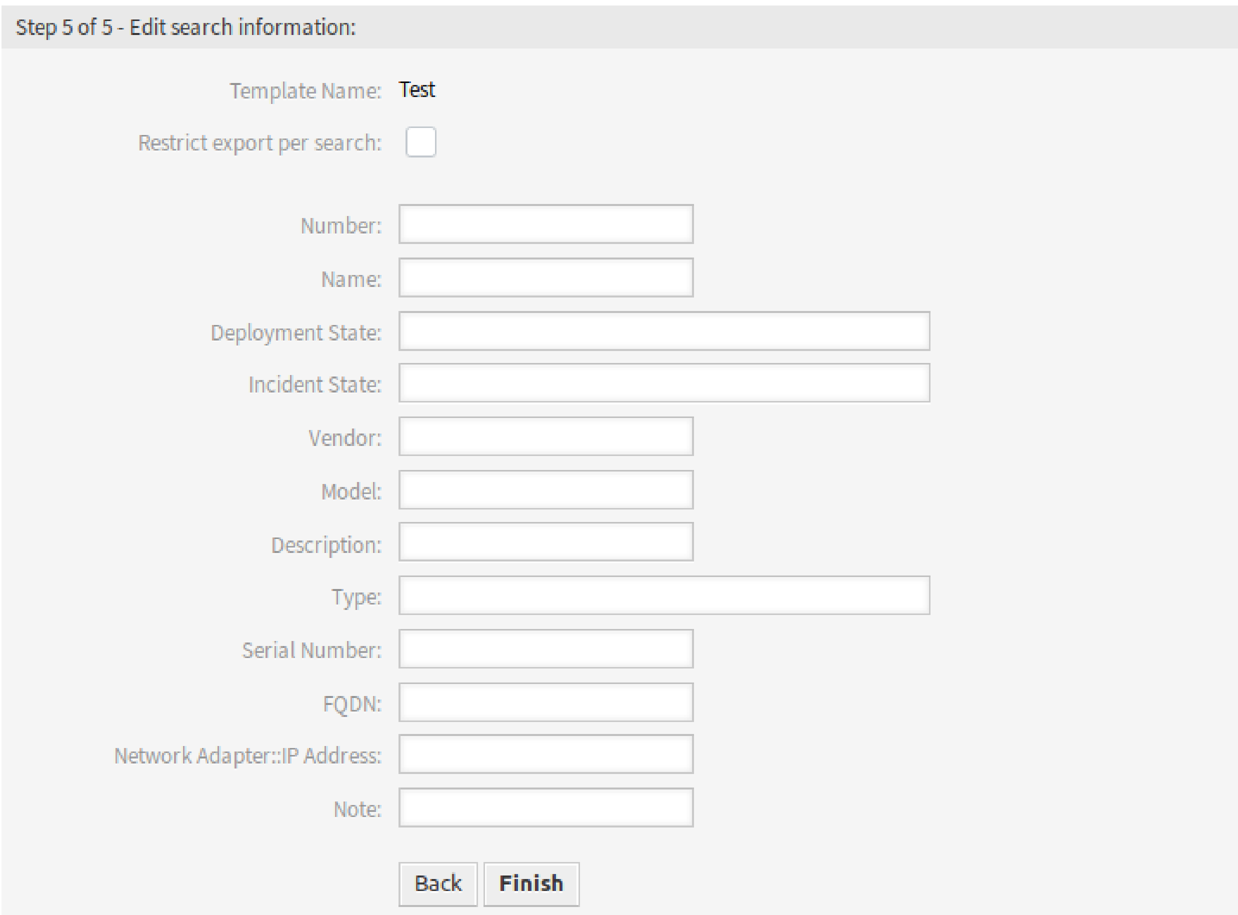


Fig. 10: Edit Search Information Screen

8.2 Agent Interface

This package has no agent interface.

8.3 External Interface

This package has no external interface.