



# **OTRS::ITSM Administration Manual**

*Release 8.0*

**OTRS AG**

**Jan 20, 2021**



<b>1</b>	<b>Introduction</b>	<b>3</b>
<b>2</b>	<b>Service Management</b>	<b>5</b>
2.1	Administrator Interface	5
2.1.1	Ticket Settings	5
2.1.1.1	Criticality Impact Priority	5
2.1.1.2	Service Level Agreements	6
2.1.1.3	Services	6
2.1.1.4	States	6
2.1.1.5	Types	8
2.1.2	Users, Groups & Roles	9
2.1.2.1	Groups	9
2.1.3	Processes & Automation	9
2.1.3.1	Dynamic Fields	10
2.1.4	Administration	10
2.1.4.1	General Catalog	11
2.1.4.2	System Configuration	13
2.2	Agent Interface	14
2.2.1	Tickets	15
2.2.1.1	Create Ticket	15
2.2.1.2	Ticket Detail View	16
2.2.2	Services	17
2.2.2.1	Service List	17
2.2.2.2	Service Detail View	18
2.2.3	Service Level Agreements	20
2.2.3.1	Service Level Agreement List	20
2.2.3.2	Service Level Agreement Detail View	20
2.2.4	Statistics and Reports	21
2.2.4.1	Statistics	22
2.3	External Interface	23
<b>3</b>	<b>Configuration Management</b>	<b>25</b>
3.1	Administrator Interface	25
3.1.1	Users, Groups & Roles	25
3.1.1.1	Groups	25
3.1.2	Processes & Automation	26
3.1.2.1	Process Management	26

3.1.2.2	Web Services	28
3.1.3	Administration	29
3.1.3.1	General Catalog	29
3.1.3.2	Import and Export	30
3.1.3.3	System Configuration	35
3.1.4	CMDB Settings	38
3.1.4.1	Configuration Items	38
3.2	Agent Interface	43
3.2.1	Configuration Items	43
3.2.1.1	Create Configuration Item	44
3.2.1.2	Configuration Item List	44
3.2.1.3	Configuration Item Detail View	45
3.2.2	Customers	47
3.2.3	Customer Users	48
3.3	External Interface	48

This work is copyrighted by OTRS AG (<https://otrs.com>), Zimmersmühlenweg 11, 61440 Oberursel, Germany.



# 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, 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
- 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](mailto:support@otrs.com) or in the [OTRS Portal](#).

---



---

## Service 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.

This package adds new objects and basic functionalities needed for common features and processes of ITIL implementation. It contains the general catalog, which is the basic for ITSM relevant configurations in the service management. Additionally, 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.

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.

### 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 Ticket Settings

After installation of the package a new module will be available in the administrator interface. A new state is added to the ticket states and some new types are added to ticket types. Furthermore, *Service Level Agreements* and *Services* screens are extended with some new fields.

##### 2.1.1.1 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.

Priority allocation

IMPACT / CRITICALITY	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. 1: Criticality Impact Priority Screen

### 2.1.1.2 Service Level Agreements

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

#### 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.

### 2.1.1.3 Services

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

#### 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.

### 2.1.1.4 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.

#### New State

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

Add SLA

★ SLA:

Type:

Service:

Calendar:

Escalation - first response time  (Notify by )  
 (minutes): 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

Escalation - update time (minutes):  (Notify by )  
 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

Escalation - solution time (minutes):  (Notify by )  
 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

Minimum Time Between Incidents   
 (minutes):

★ Validity:

Comment:

Dialog message:

Is being displayed if a customer chooses this SLA on ticket creation.

or Cancel

Fig. 2: Add Service Level Agreement Screen

Add Service

★ Service:

Sub-service of:

Type:

Criticality:

★ Validity:

Comment:

or Cancel

Fig. 3: Add Service Screen

**State Management**

**Actions**

+ Add State

**Filter for States**

Just start typing to filter...

**Hint**

Attention: Please also update the states in SysConfig where needed.  
See also: <http://doc.otrs.com/doc>

**List**

NAME	TYPE	COMMENT	VALIDITY	CHANGED	CREATED
closed successful	closed	Ticket is closed ...	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
closed unsuccessful	closed	Ticket is closed ...	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
closed with workaround	closed	Ticket is closed ...	valid	12/03/2018 10:27 (Europe/Budapest)	12/03/2018 10:27 (Europe/Budapest)
merged	merged	State for merged ...	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
new	new	New ticket create...	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
open	open	Open tickets.	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
pending auto close+	pending auto	Ticket is pending...	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
pending auto close-	pending auto	Ticket is pending...	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
pending reminder	pending reminder	Ticket is pending...	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
removed	removed	Customer removed ...	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)

Fig. 4: State Management Screen

### 2.1.1.5 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.

**Type Management**

**Actions**

+ Add Type

**Filter for Types**

Just start typing to filter...

**List**

NAME	VALIDITY	CHANGED	CREATED
Incident	valid	09/14/2020 15:42 (Europe/Budapest)	09/08/2020 14:16 (Europe/Budapest)
Incident::Major	valid	09/14/2020 15:42 (Europe/Budapest)	09/08/2020 14:16 (Europe/Budapest)
Problem	valid	09/14/2020 15:42 (Europe/Budapest)	09/08/2020 14:16 (Europe/Budapest)
ServiceRequest	valid	09/14/2020 15:42 (Europe/Budapest)	09/08/2020 14:16 (Europe/Budapest)
Unclassified	valid	12/05/2019 14:05 (Europe/Budapest)	12/05/2019 14:05 (Europe/Budapest)

Fig. 5: 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.

## 2.1.2 Users, Groups & Roles

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

### 2.1.2.1 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.

The screenshot shows the 'Group Management' interface. On the left, there is an 'Actions' section with an 'Add Group' button, a 'Filter for Groups' search box, and a 'Hint' section. The main area displays a table with 7 groups.

NAME	COMMENT	VALIDITY	CHANGED	CREATED
admin	Group of all administrators.	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
itsm-service	Group for ITSM Service mask access in the agent interface.	valid	11/30/2018 08:27 (Europe/Budapest)	11/29/2018 08:16 (Europe/Budapest)
stats	Group for statistics access.	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
users	Group for default access.	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)

**Hint:**  
The admin group is to get in the admin area and the stats group to get stats area.  
Create new groups to handle access permissions for different groups of agent (e. g. purchasing department, support department, sales department, ...).  
It's useful for ASP solutions.

Fig. 6: Group Management Screen

### New Group

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

**itsm-service** Group for accessing the *Service Management* screens 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*

## 2.1.3 Processes & Automation

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

### 2.1.3.1 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.

NAME	LABEL	ORDER	TYPE	OBJECT	VALIDITY	DELETE
ProcessManagementProcessID	Process	1	ProcessID	Ticket	valid	
ProcessManagementActivityID	Activity	2	ActivityID	Ticket	valid	
ProcessManagementActivityStatus	Activity Status	3	Dropdown	Ticket	valid	
ITSMCriticality	Criticality	4	Dropdown	Ticket	valid	
ITSMImpact	Impact	5	Dropdown	Ticket	valid	
ITSMReviewRequired	Review Required	6	Dropdown	Ticket	valid	
ITSMDecisionResult	Decision Result	7	Dropdown	Ticket	valid	
ITSMRepairStartTime	Repair Start Time	8	Date / Time	Ticket	valid	
ITSMRecoveryStartTime	Recovery Start Time	9	Date / Time	Ticket	valid	
ITSMDecisionDate	Decision Date	10	Date / Time	Ticket	valid	
ITSMDueDate	Due Date	11	Date / Time	Ticket	valid	

Fig. 7: Dynamic Field Management Screen

### New Dynamic Fields

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

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

**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.

### 2.1.4 Administration

After installation of the package some new modules will be available in the administrator interface.

### 2.1.4.1 General Catalog

Use this screen to add catalog classes and items to the system. The general catalog management screen is available in the *General Catalog* module of the *Administration* group.

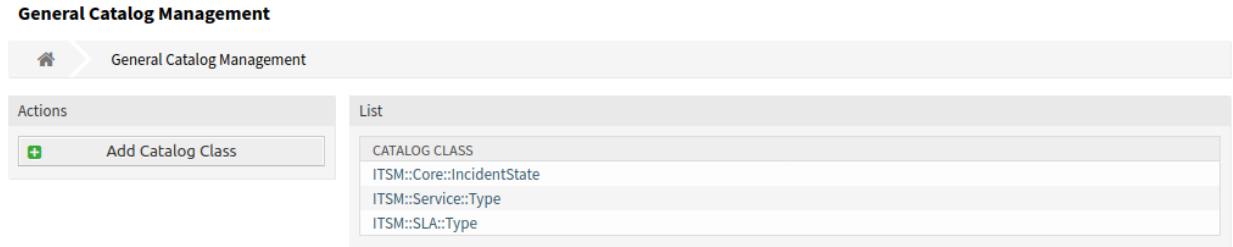


Fig. 8: General Catalog Management Screen

### 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. 9: 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*.

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.

Add Catalog Item

Catalog Class: ITSM::Core::IncidentState

★ Name:

Validity:

Comment:

or

Fig. 10: Add Catalog Item Screen

**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.

Edit Catalog Item

Catalog Class: ITSM::Core::IncidentState

★ Name:

Validity:

Comment:

or  or

Fig. 11: 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.

### Classes

The package adds some classes to the *General Catalog*.

List
CATALOG CLASS
ITSM::Core::IncidentState
ITSM::Service::Type
ITSM::SLA::Type

Fig. 12: General Catalog Class List Screen

**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.

#### 2.1.4.2 System Configuration

##### Hiding Service Incident State in Forms

This section describes how to hide the incident state field in a form if selecting a service. In default state, the incident state is shown in a form after selecting a service:

In order to hide the service incident state in a form, you need to edit the YAML configuration of the relevant form and add the following part:

Service Level Management

Service ? SLA ? Impact

Service 1 x v Select... v 3 normal x v

Incident State

Operational

\* Priority ? Due Date \* State ?

2 low v  01/10/2020 - 10:15:00 📅 open v

Fig. 13: Service Incident State in the New Phone Ticket Form

```
- Name: ServiceID
  Config:
    HideIncidentState: 1
```

The following example shows how to hide the service incident state for the New Phone Ticket form:

1. Search in the system configuration for the setting `Forms###AgentFrontend::TicketCreate::Phone::CreateP`
2. Hover over the widget in order to display the button `Edit this setting` and click on the button.
3. Search in the YAML configuration for the `ServiceID` field:

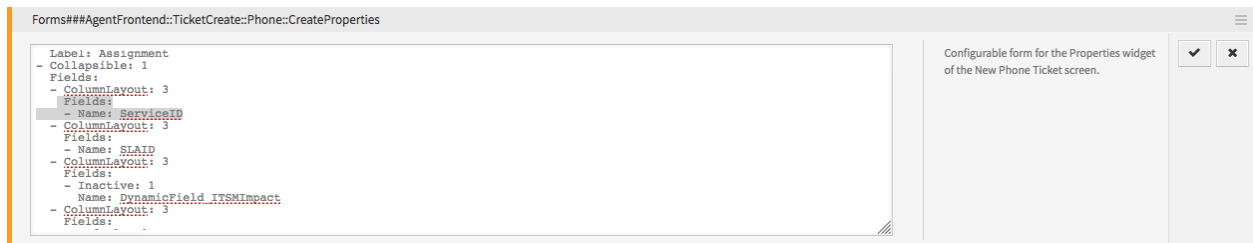


Fig. 14: YAML Configuration of the Form

4. Add the `Config` key with the `HideIncidentState` sub-key set to 1:

```
- Name: ServiceID
  Config:
    HideIncidentState: 1
```

5. Click on the tick button on the left side of the widget to save the configuration.
6. Deploy the modified settings.

After successful deployment the service incident state will be hidden in the New Phone Ticket form:

## 2.2 Agent Interface

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

Service Level Management

Service ?  x ▼

SLA ?  ▼

Impact  x ▼

\* Priority ?  ▼

Due Date   📅

\* State ?  ▼

Fig. 15: New Phone Ticket Form without the Service Incident State

## 2.2.1 Tickets

After installation of the package some new fields will be available in the ticket create screens and the ticket detail view will have some new widgets and actions.

### 2.2.1.1 Create Ticket

Some new fields will be available in *New Phone Ticket*, *New Email Ticket* and *New SMS Ticket* screens.

Service Level Management

Service ?  x ▼

SLA ?  ▼

Impact  x ▼

Incident State

\* Priority ?  ▼

Due Date   📅

\* State ?  ▼

Fig. 16: New Ticket Screen

### New Fields

**Type** Select the incident type of the ticket.

**Service** Select a service for the new ticket.

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

**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.

The priority of the new ticket is automatically calculated from the selected service and impact based on the *Criticality Impact Priority* matrix. However, the priority can be overridden and changed manually.

### 2.2.1.2 Ticket Detail View

Many new dynamic fields will be available in the ticket detail view and in the ticket actions. Additionally, two new actions are added to the actions menu.

The screenshot shows a 'Properties' widget for a ticket. At the top, it displays the ticket number '2020091510000015' with a copy icon. Below this, the widget is organized into several sections:

- Created:** 16 minutes ago
- Lock:** Ticket is locked (with a lock icon)
- Priority:** 2 low
- Queue:** Postmaster
- State:** open
- Service & SLA:** Backup and Archiving (with a refresh icon)
- Incident State:** Operational (highlighted in a green box)
- Type:** Incident
- Criticality:** 1 very low (with a refresh icon)
- Due Date:** in 3 days
- Impact:** 3 normal (with a refresh icon)

Fig. 17: Properties Widget

### Ticket Detail View Actions

The package extends some ticket actions with new dynamic fields and two new actions are added to the actions menu.

**Change Free Fields** This action can be extended with new fields.

**Type** Select the incident type of the ticket.

**Service** Select a service for the new ticket.

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

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

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

**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.

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

**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 Ticket** This action can be extended with new fields.

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

**Change Priority** This action can be extended with new fields.

**Type** Select the incident type of the ticket.

**Service** Select a service for the new ticket.

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

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

## 2.2.2 Services

After installation of the package a new menu section will be available in the main menu.

---

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

---

### 2.2.2.1 Service List

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

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 detail view 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 with the link type *depend on*. 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*.

Incident State	Name ^	Criticality	Type	Comment	Changed
Operational	Backup and Archiving	1 very low	Demonstration		a month ago
Operational	Communication	1 very low	Demonstration		a month ago
Operational	Desktop Management	1 very low	Demonstration		a month ago
Operational	Desktop Productivity Tools	1 very low	Demonstration		3 minutes ago
Operational	File / Print	1 very low	Demonstration		3 minutes ago
Operational	Helpdesk	1 very low	Demonstration		3 minutes ago
Operational	IT Operations	1 very low	Demonstration		3 minutes ago
Operational	Identity and Access Management	1 very low	Demonstration		3 minutes ago
Operational	Internet	1 very low	Demonstration		3 minutes ago
Operational	Network Access	1 very low	Demonstration		3 minutes ago
Operational	Remote Access	1 very low	Demonstration		3 minutes ago
Operational	Standard Desktop	1 very low	Demonstration		3 minutes ago

Fig. 18: Service List

- 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*.

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 [Configuration Items](#) to setup the dynamic calculation of service states.

### 2.2.2.2 Service Detail View

Use this screen to see the details of a service. The service detail view is available if you select a service from a service list.

#### Service Detail View Widgets

Like other business object detail views, the service detail view is also highly customizable. Some of the following widgets are displayed with the default installation, but others have to be added in the screen configuration.

**Service Information Widget** This widget shows information about the service.

Service Information		
Service: Backup and Archiving		
Incident State	Created	Changed
Operational	a month ago	a month ago
Type	Criticality	Validity
Demonstration	1 very low	valid

Fig. 19: Service Information Widget

**Associated SLAs Widget** This widget shows the service level agreements that are associated to the service. If you click on a service level agreement, the *Service Level Agreements* detail view will open.

Associated SLAs (2 SLAs)						
Name ^	Type	Calendar	First Response Time	Update Time	Solution Time	Changed
24/7	Availability	Calendar 2 - Non-stop Services	1d	2d	3d	an hour ago
Extended Business Hours	Availability	Calendar 3 - Extended Business Hours	0	0	0	2 hours ago

Fig. 20: Associated SLAs Widget

**Linked Knowledge Base Articles Widget** This widget shows the linked knowledge base articles, but the widget is only displayed when at least one knowledge base article is linked to this business object. New links can be added with the *Link Objects* action. Existing links can also be managed there.

Linked Knowledge Base Articles (1 Article)						
FAQ#	Title	State	Created	Linked As	Unlink	
<input type="checkbox"/> 10002	How to install feature addons	internal (agent)	2 minutes ago	Normal	<input type="checkbox"/>	<input type="checkbox"/>

Fig. 21: Linked Knowledge Base Articles Widget

## Service Detail View Actions

The following actions are available in the service detail view.

**Link Objects** This action allows agents to link other business objects to the service.

**Print Service** This action allows agents to print the service to a PDF file and to download it.

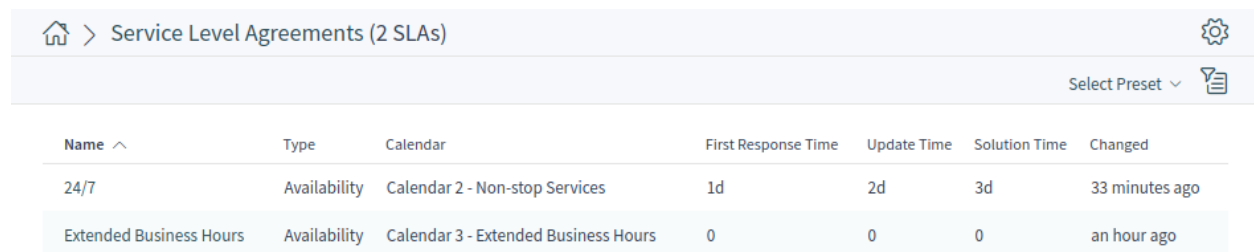
## 2.2.3 Service Level Agreements

After installation of the package a new menu section will be available in the main menu.

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

### 2.2.3.1 Service Level Agreement List

Use this screen to get a list of service level agreements directly in the agent interface. The *Service Level Agreements* menu item is available in the main menu.



Name ^	Type	Calendar	First Response Time	Update Time	Solution Time	Changed
24/7	Availability	Calendar 2 - Non-stop Services	1d	2d	3d	33 minutes ago
Extended Business Hours	Availability	Calendar 3 - Extended Business Hours	0	0	0	an hour ago

Fig. 22: Service Level Agreement List

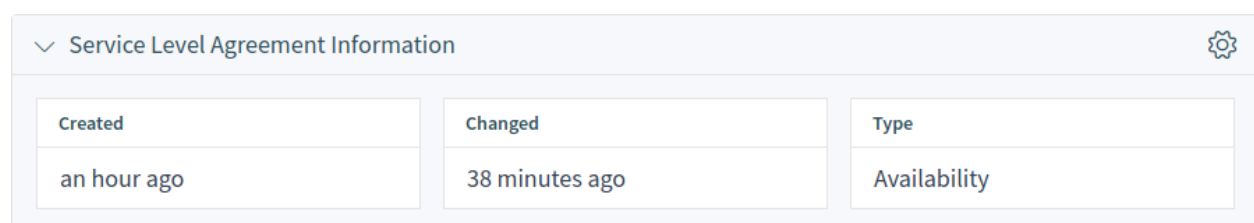
### 2.2.3.2 Service Level Agreement Detail View

Use this screen to see the details of a service level agreement. The service level agreement detail view is available if you select a service level agreement from a service level agreement list.

#### Service Level Agreement Detail View Widgets

Like other business object detail views, the service level agreement detail view is also highly customizable. Some of the following widgets are displayed with the default installation, but others have to be added in the screen configuration.

**Service Level Agreement Information Widget** This widget shows information about the service level agreement.

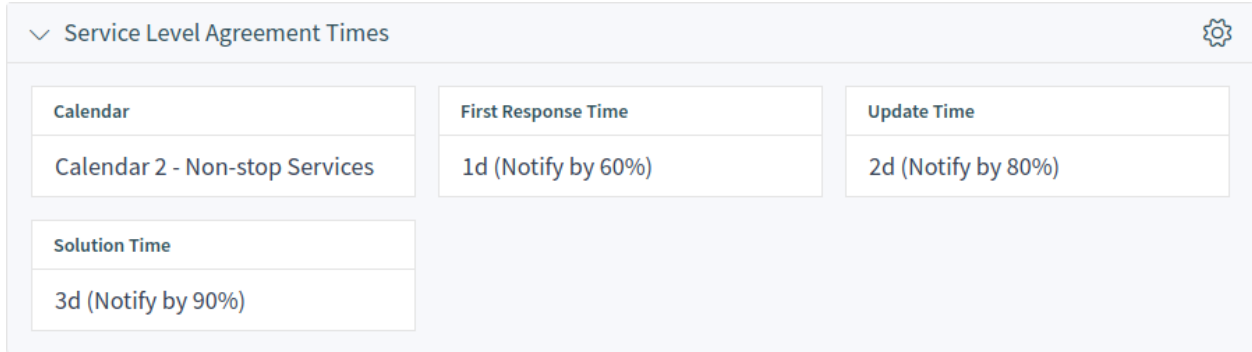


Created	Changed	Type
an hour ago	38 minutes ago	Availability

Fig. 23: Service Level Agreement Information Widget

**Service Level Agreement Times Widget** This widget shows times related to the service level agreement.

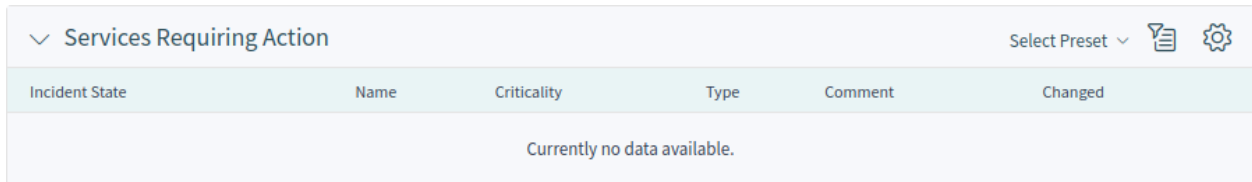




The widget displays a list of service level agreement times. It includes a dropdown menu for 'Service Level Agreement Times' and a settings icon. The list contains four items:

- Calendar**: Calendar 2 - Non-stop Services
- First Response Time**: 1d (Notify by 60%)
- Update Time**: 2d (Notify by 80%)
- Solution Time**: 3d (Notify by 90%)

Fig. 24: Service Level Agreement Times Widget

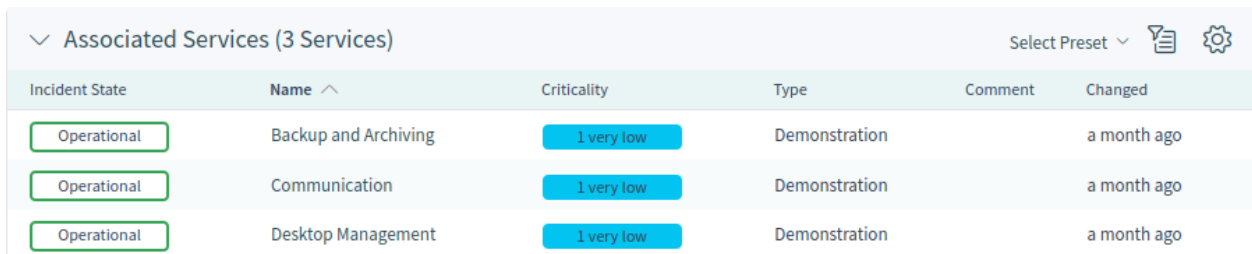


The widget displays a table of services requiring action. It includes a dropdown menu for 'Services Requiring Action', a 'Select Preset' dropdown, and a settings icon. The table has the following columns: Incident State, Name, Criticality, Type, Comment, and Changed. The table is currently empty, displaying the message 'Currently no data available.'

Fig. 25: Services Requiring Action Widget

**Services Requiring Action Widget** This widget lists the services that required an action.

**Associated Services Widget** This widget shows the services that are associated to the service level agreement. If you click on a service, the *Services* detail view will open.



The widget displays a table of associated services. It includes a dropdown menu for 'Associated Services (3 Services)', a 'Select Preset' dropdown, and a settings icon. The table has the following columns: Incident State, Name, Criticality, Type, Comment, and Changed. The table contains three rows of data:

Incident State	Name	Criticality	Type	Comment	Changed
Operational	Backup and Archiving	1 very low	Demonstration		a month ago
Operational	Communication	1 very low	Demonstration		a month ago
Operational	Desktop Management	1 very low	Demonstration		a month ago

Fig. 26: Associated Services Widget

### Service Level Agreement Detail View Actions

The following actions are available in the service level agreement detail view.

**Print Service Level Agreement** This action allows agents to print the service level agreement to a PDF file and to download it.

## 2.2.4 Statistics and Reports

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

### 2.2.4.1 Statistics

The following metrics are added to the system as new statistics:

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  
Total number of all configuration items ever created per Class and State  
Monthly overview of all configuration items created in the last month per Class  
Monthly overview of all configuration items created in the last month per State  
Number of configuration items created in a specific time period per Class and  
→State  
First level solution rate for all tickets ever created per Ticket-Type and  
→Priority  
First level solution rate for all tickets ever created per Ticket-Type and  
→Queue  
First level solution rate for all tickets ever created per Ticket-Type and  
→Service  
Monthly overview of first level solution rate per Ticket-Type in the last month  
Monthly overview of first level solution rate per Priority in the last month  
Monthly overview of first level solution rate per Queue in the last month  
Monthly overview of first level solution rate per Service in the last month  
First level solution rate for all tickets created in a specific time period  
→per Ticket-Type and Priority  
First level solution rate for all tickets created in a specific time period  
→per Ticket-Type and Queue  
First level solution rate for all tickets created in a specific time period  
→per Ticket-Type and Service  
Average solution time for all tickets ever created per Ticket-Type and  
→Priority  
Average solution time for all tickets ever created per Ticket-Type and Queue  
Average solution time for all tickets ever created per Ticket-Type and Service  
Monthly overview of the average solution time per Ticket-Type in the last  
→month  
Monthly overview of the average solution time per Priority in the last month  
Monthly overview of the average solution time per Queue in the last month  
Monthly overview of the average solution time per Service in the last month  
Average solution time of tickets created in the last month per Ticket-Type  
→and Priority

(continues on next page)

(continued from previous page)

Average solution time of tickets created in the last month per Ticket-Type →and Queue
Average solution time of tickets created in the last month per Ticket-Type →and Service

## 2.3 External Interface

This package has no external interface.



---

## 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.

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

---

**Note:** This package requires the *Service Management* 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 Users, Groups & Roles

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

##### 3.1.1.1 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.

**Group Management**

**Actions**

+ Add Group

**Filter for Groups**

Just start typing to filter...

**Hint**

The admin group is to get in the admin area and the stats group to get stats area.

Create new groups to handle access permissions for different groups of agent (e. g. purchasing department, support department, sales department, ...).

It's useful for ASP solutions.

**List (8 total)**

NAME	COMMENT	VALIDITY	CHANGED	CREATED
admin	Group of all administrators.	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
itsm-configitem	Group for ITSM Configitem mask access in the agent interface.	valid	12/03/2018 12:11 (Europe/Budapest)	12/03/2018 12:11 (Europe/Budapest)
itsm-service	Group for ITSM Service mask access in the agent interface.	valid	11/30/2018 08:27 (Europe/Budapest)	11/29/2018 08:16 (Europe/Budapest)
stats	Group for statistics access.	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)
users	Group for default access.	valid	11/11/2018 15:29 (Europe/Budapest)	11/11/2018 15:29 (Europe/Budapest)

Fig. 1: Group Management Screen

## New Group

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

***itsm-configitem*** Group for accessing the *Asset Management* screens 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*

## 3.1.2 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.

### 3.1.2.1 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.

**Add Configuration "Example Script Task Activity"**  
[Go Back](#)

Search for one or more configuration items and link all matches to the ticket.

▼ Main search parameters for configuration items. Any results will be linked using the specified link type.

★ Class:

Deployment State:

Incident State:

Link Type:

Define the link type for found ITSMConfigItems.

▼ Additional attributes for configuration item search (e.g. OrderBy, OrderByDirection and XML definition attributes). ⊕

Key: Number	Value: <input type="text"/>	⊖
Key: Name	Value: <input type="text"/>	⊖
Key: Limit	Value: <input type="text" value="1"/>	⊖
Key: OrderBy	Value: <input type="text"/>	⊖
Key: OrderByDirection	Value: <input type="text"/>	⊖

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.

**Add Configuration "Example Script Task Activity"**  
Go Back

Copy all specified attributes of a linked configuration item to the ticket.

▼ Restrictions for linked configuration items. Only configuration items linked with the specified link type and matching other restrictions will be considered.

★ Class:

Deployment State:

Incident State:

Link Type:   
Define the link type for found ITSMConfigItems.

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

★ Behavior

▼ Mapping of configuration item attributes to ticket attributes (e.g. key: "HardDisk:Capacity", value: "DynamicField\_HardDiskSize" or key: "Name", value: "Title"). ⊕

Key:  Value:

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).

### 3.1.2.2 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 on [GitHub](#).

**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.

**3.1.3 Administration**

After installation of the package some new classes will be available in the *General Catalog* and a new module will be available in the administrator interface.

**3.1.3.1 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 *Configuration Items* module of the *CMDB Settings* group.

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

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

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

List
CATALOG CLASS
ITSM::ConfigItem::Class
ITSM::ConfigItem::Computer::Type
ITSM::ConfigItem::DeploymentState
ITSM::ConfigItem::Hardware::Type
ITSM::ConfigItem::Location::Type
ITSM::ConfigItem::Network::Type
ITSM::ConfigItem::Software::LicenceType
ITSM::ConfigItem::Software::Type
ITSM::ConfigItem::YesNo
ITSM::Core::IncidentState
ITSM::Service::Type
ITSM::SLA::Type

Fig. 4: General Catalog Class List Screen

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

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

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

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

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

### 3.1.3.2 Import and Export

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

Import/Export Management															
Actions <input type="button" value="Add template"/>	Config Item <table border="1"> <thead> <tr> <th>NUMBER</th> <th>NAME</th> <th>FORMAT</th> <th>VALIDITY</th> <th>DELETE</th> <th>START IMPORT</th> <th>START EXPORT</th> </tr> </thead> <tbody> <tr> <td>000002</td> <td>Test</td> <td>CSV</td> <td>valid</td> <td></td> <td>Import</td> <td>Export</td> </tr> </tbody> </table>	NUMBER	NAME	FORMAT	VALIDITY	DELETE	START IMPORT	START EXPORT	000002	Test	CSV	valid		Import	Export
NUMBER	NAME	FORMAT	VALIDITY	DELETE	START IMPORT	START EXPORT									
000002	Test	CSV	valid		Import	Export									
Note															

Fig. 5: 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.

Step 1 of 5 - Edit common information:

Name:

Object:

Format:

Valid:

Comment:

or Cancel

Fig. 6: 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.

Step 1 of 5 - Edit common information:

Name:

Object: ITSMConfigItem

Format: CSV

Valid:

Comment:

or Cancel

Fig. 7: 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.


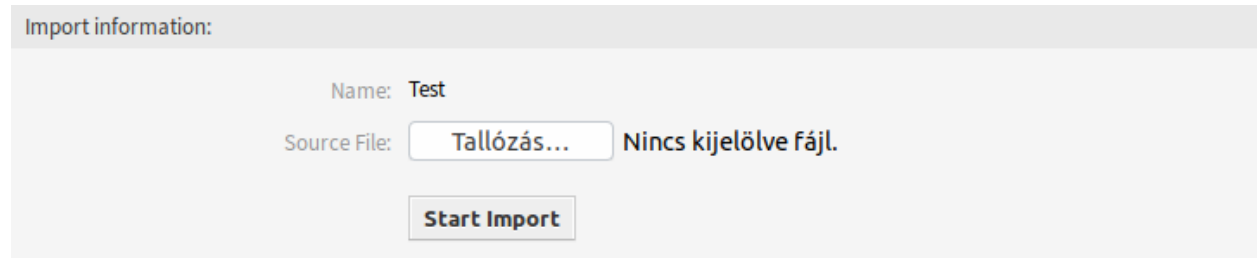
Config Item						
NUMBER	NAME	FORMAT	VALIDITY	DELETE	START IMPORT	START EXPORT
000002	Test	CSV	valid		Import	Export

Fig. 8: Delete Import/Export Template Screen

To import data based on a template:

1. Click on the *Import* link in the list of templates.
2. Click on the *Browse...* button and select a CSV file.
3. Click on the *Start Import* button.



Import information:

Name: Test

Source File:  Nincs kijelölve fájl.

Fig. 9: 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

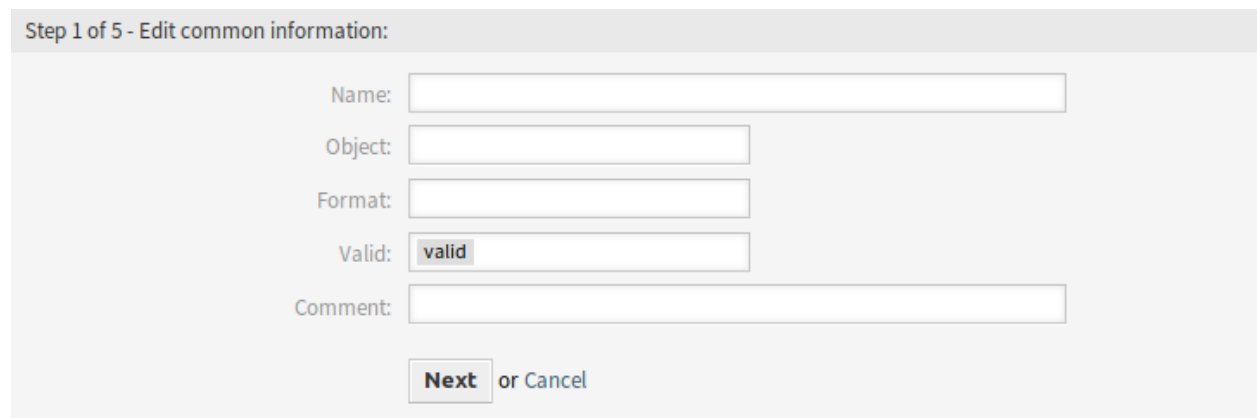
The following settings are available when adding this resource. The fields marked with an asterisk are mandatory.

---

**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



Step 1 of 5 - Edit common information:

Name:

Object:

Format:

Valid:

Comment:

or Cancel

Fig. 10: Edit Common Information 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.

**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.

### Edit Object Information

Step 2 of 5 - Edit object information:

Name: Test

Object: ITSMConfigItem

Class:

Maximum number of one element:

Empty fields indicate that the current  values are kept:

Fig. 11: 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, how many items can have an item.

**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.

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

### Edit Mapping Information

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.

Step 3 of 5 - Edit format information:

Name: **Test**

Format: **CSV**

Column Separator:

Charset: **UTF-8**

Include Column Headers: **No**

Fig. 12: Edit Format Information Screen

Step 4 of 5 - Edit mapping information:

Name: **Test**    Object: **Config Item**    Format: **CSV**

KEY	IDENTIFIER	COLUMN	UP	DOWN	DELETE
No map elements found.					

Fig. 13: Edit Mapping Information Screen

## Edit Search Information

Step 5 of 5 - Edit search information:

Template Name: **Test**

Restrict export per search:

Number:

Name:

Deployment State:

Incident State:

Vendor:

Model:

Description:

Type:

Serial Number:

FQDN:

Network Adapter::IP Address:

Note:

Fig. 14: Edit Search Information Screen

**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.

### 3.1.3.3 System Configuration

#### Displaying Configuration Item Class Specific Columns

Configuration item class specific columns (i.e. the capacity of a hard disc) are not shown in the configuration overview list and at the configuration item organizer item list per default.

In order to display configuration item field values as table columns, the YAML configuration of the lists needs to be extended .

The following example shows how to add the field `Computer::HardDisk::1` and `Computer::HardDisk::1::Capacity::1` of the class `Computer` to the configuration item overview list:

1. Search in the system configuration for the setting `AgentFrontend::ConfigItemList###DefaultConfig`.
2. Add the following to the YAML configuration:

```
Columns:
  Computer::HardDisk::1:
    IsVisible: 2
  Computer::HardDisk::1::Capacity::1:
    IsVisible: 2
```



Fig. 15: Example YAML Configuration of the Configuration Item Overview

3. Deploy the modified configuration.

<input type="checkbox"/>	Class	Name	Incident State	Deployment State	ConfigItem#	Computer: Hard Disk 1	Computer: Capacity	Changed	Duplicate
<input type="checkbox"/>	Hardware	Keyboard Logitech	Operational	Production	5465000001			2 hours ago	
<input type="checkbox"/>	Computer	Poseidon	Operational	Production	5464000002	Samsung 460 Evo 2.5"	500 GB	2 hours ago	
<input type="checkbox"/>	Computer	Zeus	Operational	Production	5464000001	Samsung 860 Evo 2.5"	1000 GB	23 hours ago	

Fig. 16: Configuration Item Overview with Class Specific Columns

### Applying Configuration Item Class Specific Filters

The following example shows how to apply the filter for the `Computer::Model` field of the class `Computer` in the configuration item overview list.

First you need to make sure, that the relevant class filter is also applied, otherwise all class-specific filters will be simply ignored.

This can be done via the `ClassIDs` filter, which takes the ID of the class as the value. Please follow the steps below to get the ID of the class and apply the filters.

1. Go to the Configuration Management section of the administrator interface.



- Click on the relevant class in the list.

The `ClassID` is now shown at the URL, i.e.:

```
otrs/index.pl/?Action=AdminITSMConfigItem;Subaction=DefinitionList;ClassID=22
```

In this case the ID is 22.

- Search in the system configuration for the setting `AgentFrontend::ConfigItemList###DefaultConfig`
- Set both the filter for the class to the value determined in step 2 and the field filter to the desired value:

**ActiveFilters:**

**ClassIDs:**

**Value:**

- 22

**Computer::Model:**

**Value:** ModelA

- Deploy the modified configuration.

**Edit Screen**

**\* Hide/Show Columns**

- Incident State
- Deployment State
- Number
- Name

**\* Sort List**

Sort first by

Number (descending)
▼

+ Add New Sorting

**Filter List**

Class

Computer x

x ▼

Computer: Model

ModelA

+ Add New Filter

Fig. 17: Configuration Item Overview with Class Specific Filter

**Note:** The fields that can be filtered need to have `Searchable: 1` set in their class definitions. See [here](#) for more information.

## Applying Configuration Item Filters for All Classes

The following example shows how to apply the filters for the common `Owner` and `CustomerID` fields which are used in all classes in the configuration item overview list.

1. Search in the system configuration for the setting `AgentFrontend::ConfigItemList###DefaultConfig`.
2. Add the following to the YAML configuration:

```
AvailableSearchInAllClassesFilters:
- Owner
- CustomerID
```

3. Deploy the modified configuration.

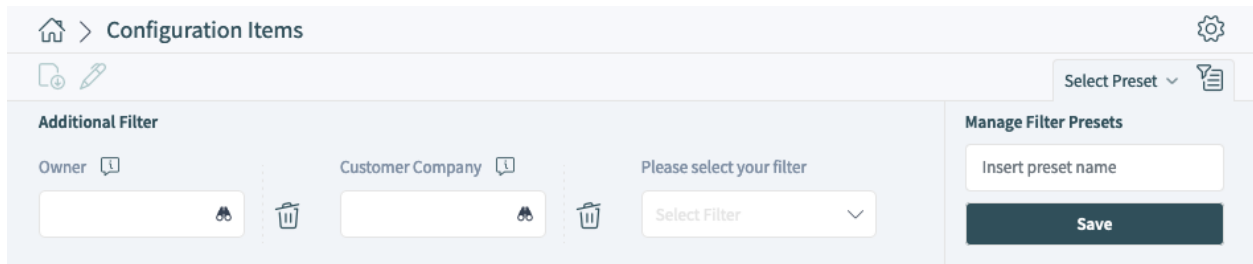


Fig. 18: Configuration Item Overview with All Class Filters

## 3.1.4 CMDB Settings

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

### 3.1.4.1 Configuration Items

Use this screen to manage class definition of configuration item classes. The configuration item class management screen is available in the *Configuration 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.
2. Select a version by clicking on a class name in the list of class versions.

### Configuration Item Management

Configuration Item Management

Actions

Change class definition

List

CONFIGURATION ITEM CLASS
Computer
Hardware
Location
Network
Software

Fig. 19: Configuration Item Management Screen

Change:

Configuration Item Class: **Computer**

Definition:

```

---
- Key: Vendor
  Name: Vendor
  Searchable: 1
  Input:
    Type: Text
    Size: 50
    MaxLength: 50

- Key: Model
  Name: Model
  Searchable: 1
  Input:
    Type: Text
    Size: 50
    MaxLength: 50
  
```

Save or Save and finish or Cancel

Fig. 20: Edit Configuration Item Class Definition Screen

### Configuration Item Management

Configuration Item Management

Configuration Item Management > Computer

Actions

Computer x

Change class definition

Go to overview

List

CONFIGURATION ITEM CLASS	VERSION	CREATED BY	CREATED
Computer	1	Admin OTRS	09/15/2020 10:10:57 (Europe/Budapest)

Fig. 21: 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 translation files. See the [Custom Translation File](#) chapter in the developer 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:

- **Text:** A single text field.
- **TextArea:** A text field with multiple rows.
- **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.
- **CustomerCompany:** A drop-down list for select a customer from the database back end.
- **Customer:** A drop-down list for select a customer user from the database back end. The field can be used with wildcards (\*).

- **Date:** A field for select a date.
- **DateTime:** A field for select date and time.
- **Integer:** A drop-down list with integer numbers.

**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 positive 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 positive 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 positive integer.

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

**CountDefault** Defines how many field should be displayed by default. The value must be a positive 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 *Customers* and *Customer Users* 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
  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
```

(continues on next page)

(continued from previous page)

<pre> 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     CountMax: 1     CountDefault: 0     SuppressVersionAdd: UpdateLastVersion </pre>
--

## 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 Configuration Items

After installation of the package a new menu section will be available in the main menu.

---

**Note:** In order to grant users access to the *Asset Management* menu, you need to add them as member

to the group *itsm-configitem*.

---

### 3.2.1.1 Create Configuration Item

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

General Information

\* Class

Select... ▼

\* Name

\* Incident State ⓘ

Select... ▼

\* Deployment State ⓘ

Select... ▼

Create

Fig. 22: Create Configuration Item Screen

#### See also:

The fields in the *Properties* widget can be very different on each classes. To see the available fields, check the *Configuration Items* module in the administrator interface.

### 3.2.1.2 Configuration Item List

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 *Services* screen of the agent interface.

#### See also:



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

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

Incident State	Deployment State	ConfigItem#	Name	Class	Changed	Duplicate
<input type="checkbox"/> Operational	<input type="checkbox"/> Production	1022000001	Web server	Computer	2 hours ago	

Fig. 23: Configuration Item List

### 3.2.1.3 Configuration Item Detail View

Use this screen to see the details of a configuration item. The configuration item detail view is available if you select a configuration item from a configuration item list.

#### Configuration Item Detail View Widgets

Like other business object detail views, the configuration management detail view is also highly customizable. Some of the following widgets are displayed with the default installation, but others have to be added in the screen configuration.

**Configuration Item Information Widget** This widget shows information about the configuration item.

Configuration Item Information		
ConfigItem# 1022000001		
Name	Class	Incident State
Web server	Computer	<input type="checkbox"/> Operational
Deployment State	Created	Changed
<input type="checkbox"/> Production	2 hours ago	2 hours ago

Fig. 24: Configuration Item Information Widget

**Configuration Item Version Details Widget** This widget shows the configuration item versions. Any change on a configuration item will create a new version. Clicking on a version in this widget will expand the details.

**Attachments Widget** This widget can be used to display attachments to the configuration item. The attachments can be downloaded and, for the images, a preview function is supported.

Configuration Item Version Details						Expand All	Select Preset		
Deployment State	Incident State	Version#	Name	Created	Created By				
Production	Operational	1	Web server	2 hours ago	Admin OTRS				

Fig. 25: Configuration Item Version Details Widget

Attachments							Select Preset		
Type	Filename	File size	Preview	Download					
	ryzen-3700x.pdf	472.33 KB							

Fig. 26: Attachments Widget

### Configuration Item Detail View Actions

The following actions are available in the ticket detail view.

ORGANIZATION	VIEWS
Edit Configuration Item	View History
Link Objects	Print Configuration Item
Duplicate Configuration Item	
Delete Configuration Item	

Fig. 27: Configuration Item Detail View Actions

**Organization** This column groups the following actions together:

**Edit Configuration Item** This action allows agents to edit the configuration item.

**Link Objects** This action allows agents to link other business objects to the configuration item.

**Duplicate Configuration Item** This action allows agents to duplicate the configuration item.

**Delete Configuration Item** This action allows agents to delete the configuration item.

**Views** This column groups the following actions together:

**View History** This action allows agents to view the history of the configuration item. The history contains all operations that happened with the configuration item in the past, along with timestamp and username of the person who took the action.

**Print Configuration Item** This action allows agents to print the configuration item to a PDF file and to download it.

### 3.2.2 Customers

After installation of the package a new widget named *Configuration Item List* will be available in the customer detail view.

Incident State	Deployment State	ConfigItem#	Name	Class	Changed
Operational	Production	1022000001	Web server	Computer	20 minutes ago

Fig. 28: Configuration Item List Widget

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

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 `AgentFrontend::CustomerCompanyDetailView::WidgetType###ConfigItemList` system configuration setting for more information.

The default setting is:

#### **ClassBasedCustomerIDSearch:**

```
Computer: CustomerID
Hardware: CustomerID
Location: CustomerID
Network: CustomerID
Software: CustomerID
```

#### **ClassBasedCustomerSearch:**

```
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 *Configuration 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
```

### 3.2.3 Customer Users

After installation of the package a new widget named *Configuration Item List* will be available in the customer user detail view.

Incident State	Deployment State	ConfigItem#	Name	Class	Changed
Operational	Production	1022000001	Web server	Computer	20 minutes ago

Fig. 29: Configuration Item List Widget

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

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 `AgentFrontend::CustomerUserDetailView::WidgetType###ConfigItemList` system configuration setting for more information.

The default setting is:

#### `ClassBasedCustomerUserSearch:`

```

Computer: Owner
Hardware: Owner
Location: Owner
Network: Owner
Software: Owner

```

#### `ClassBasedCustomerSearch:`

```

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 *Configuration 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

```

## 3.3 External Interface

This package has no external interface.