Creatio Academy

ITSM tools

Version 7.17

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Manage service catalog

PRODUCTS: SERVICE CREATIO BANK CUSTOMER JOURNEY

Creatio implements the “Service catalog management” ITSM process in the [*Services*] section. This section is designed to manage the list of services you provide. Here, you can set the parameters of services, assign employees to process the related cases, as well as view the history of services provided.

Add services

To add a new service in Creatio:

1. Open the [*Services*] section and click [*New service*] in the section list.
2. Populate the service page:

Name	Service name.
Status	Current service status. For example, “Active” or “Under testing.”
Response time unit	The time units used to measure the case response time, e.g., “Working days,” “Calendar days,” etc.
Resolution time unit	Time units used to measure the case resolution time, e.g., “Working days,” “Calendar days,” etc.
Owner	The employee responsible for the quality of the provided service. The field is only available for **Service Creatio, enterprise edition**.
Category	The service category, for example, “Hardware” or “Internal support.” The field is only available for **Service Creatio, enterprise edition**.
Case category	The category that will be assigned to the cases based on this service: “Incident,” “Complaint,”“Claim,” “Consultation” (available for The **Financial Services Creatio, customer journey edition**), “Service request.” When you create a new case and populate the [*Service*] field, Creatio will specify the selected category in the [*Category*] field of the case page.
Calendar	The calendar that defines the work of the support team. Creatio calculates the response and resolution time for the service-related cases based on the selected calendar. By default, the field is populated with the value specified in the “Base calendar” (BaseCalendar) system setting. Custom calendars can be set up in the corresponding lookup

3. On the [*Service profile*] tab → [*Service team*] detail, click + and populate information about the service

team providing support within the service. The detail is only available for **Service Creatio, enterprise edition**.

> **Note.** The [*Service team*] detail contains information about the employees or employee groups responsible for resolving cases related to a service, e.g., “Contact center agents,” “System administrators” or “2nd line of support.”
>
> Information on this detail is used to select assignees and assigned teams on the case page.

Populate the record data directly in the detail list.

Member/team	Employees or employee groups that can resolve the service-related case. The field lookup contains the list of administration objects: system users and user groups.
Support line	Support line whose employee is assigned to provide service-related support.

4. Populate information about the service-related agreements on the [*Users*] tab. The tab is only available for **Service Creatio, enterprise edition**.

> **Note.** The [*Service agreements*] tab displays a list of service contracts from the [*Service agreements*] section that include the service. To connect a service to a service contract, populate the [*Services*] detail of the service agreement page. The information on the detail is available in the “read-only” mode.

5. On the [*Attachments and notes*] tab, add attachments and links to the web resources related to the service. Read more >>>
6. Click [*Save*] to save the service record.

   As a result, the new service record with the specified parameters will appear in the list of the [*Services*] section.

Create a service model

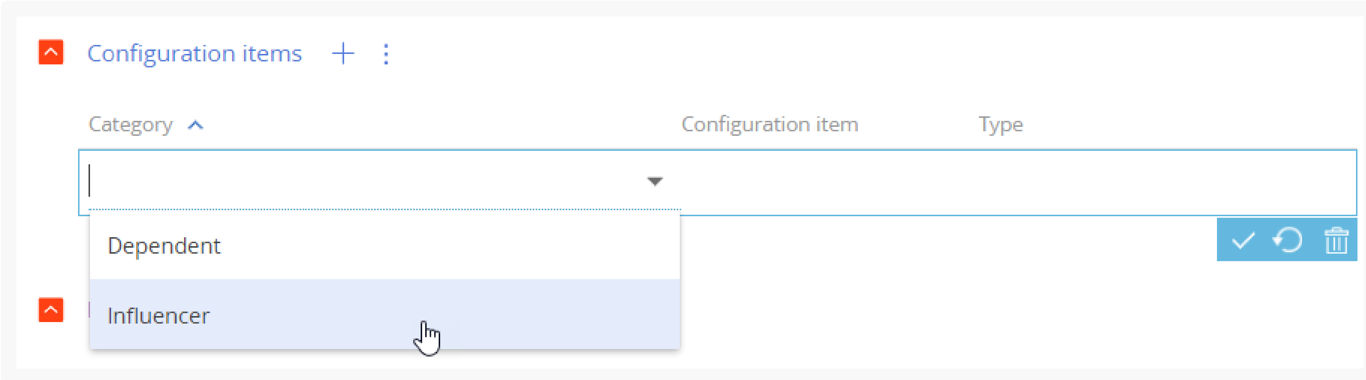
A **service model** is a diagram that displays connections and dependencies between various IT infrastructure items. The model is generated based on the connections between the services and the configuration items.

> **Note.** The service models are only available in Service Creatio, enterprise edition.

To add a service to the service model:

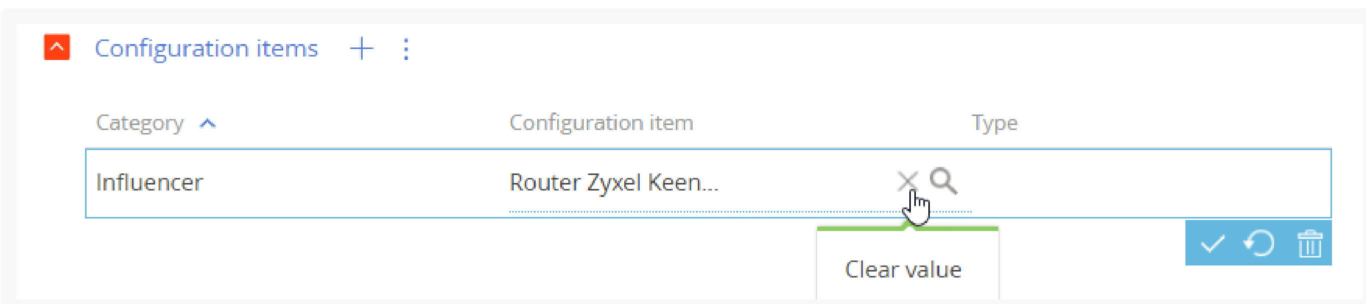
1. In the [*Services*] section, open the record to specify the connected services and configuration items.
2. Click the [*Connected to*] tab.
3. Click + on the [*Configuration items*] detail. A new record with blank fields will appear on the detail.
4. Select the connection category with the configuration item in the [*Category*] field (Fig. 1).

Fig. 1 Selecting the connection category



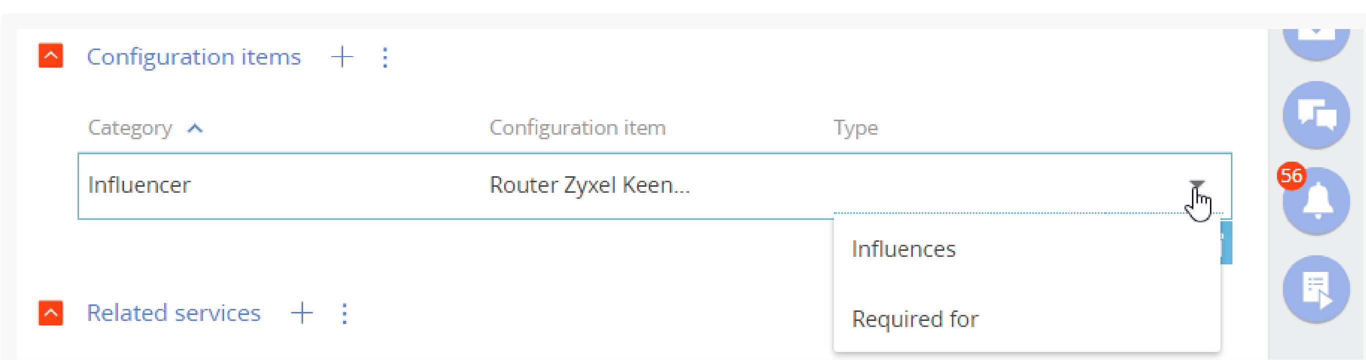
1. Select the "Influencer" connection category to add a link to a configuration item that affects the current service delivery.
2. Select the "Dependent" connection category to add a link to a configuration item whose operation depends on the current service.
3. In the [*Configuration item*] field, select the linked configuration item. For example, the "WiFi access" service depends on the "Router" configuration item (Fig. 2).

Fig. 2 Selecting the connected configuration item



4. In the [*Type*] field, select a short description of connections between the current service and the selected configuration item. For example, the "Required for" connection type can be specified for the "WiFi access" service and the "Router" configuration item (Fig. 3).

Fig. 3 Selecting the connection type



As a result, a **connection** between the service and the configuration item will be specified. If the “Influencer” category was selected upon specifying the connection, the configuration item, whose connection has been specified will contain **inverse relation** with the “Dependent” category on the

[*Connected to*] tab of the [*Services*] detail. The [*Type*] field of the inverse relationship will be automatically populated with the inverse connection type according to the “**Object dependency type**” lookup content. For example, if the type of the connection is “Required for,” the inverse relation is “Installed on.”

5. Specify other connections to the configuration items.
6. Add connections to the relevant services by clicking + on the [*Related services*] detail. The procedure for linking services is similar to that of linking configuration items (see steps 3-6).
7. If required, open the [*Configurations*] section and add the missing connections between the configuration items.

   As a result, Creatio will add connections between the services and configuration items which make the visual display of the service model possible when handling the cases or planning the changes.

Manage service agreements

PRODUCTS: SERVICE ENTERPRISE

Creatio implements the "Service level management" ITSM process in the [*Service agreements*] section. Use this section to determine the customer service requirements, manage your agreements, and in-house service agreements. For each agreement, you can define the individual terms of service and view the statistics.

Add service agreements

To add a new service agreement:

1. Open the [*Service agreements*] section and click [*New*] in the section list.
2. Populate the service agreement page:

Title	Name of the service agreement. By default, it consists of the service agreement number and the name of the account: “24 – Axiom”.
Number	Service agreement number. Creatio automatically generates numbers according to the pattern specified in the “Service agreement current number" (ServicePactLastNumber) system setting. This is a non-editable field.
Type	Type of service agreement: • SLA – service level agreement. This type is used to define the service parameters for the end-users. • OLA – operational level agreement. This type is used to indicate the internal service agreements of your company. For example, the agreements between departments or employee groups. • UC – underpinning contract. These are the agreements between your company and its suppliers. If you select the “UC” type on the [*Contract provisions*] tab, additional fields will be available to enter information about the service provider.
Status	Current status of the service agreement, for example, “Draft” or “Active”.
Start/End	The start and end dates of the service agreement validity.
Owner	Name of the user responsible for managing and updating information about the service agreement.
Calendar	The calendar that determines workdays and business hours of the support team. Creatio uses calendars to calculate the response and resolution time for service-related cases. By default, the field is populated with the value specified in the “Base calendar“ (BaseCalendar) system setting. Use the [*Calendars*] lookup to set up custom calendars.
Support level	The support package that is provided according to the service agreement. Creatio calculates the response and resolution deadline values based on the support level.

3. On the [*Contract provisions*] tab, populate information about the service objects and services.
4. On the [*Attachments and notes*] tab, enter additional information about the service agreement and related links to web resources. For example, attach a photocopy of the signed agreement. Read more >>>
5. Click [*Save*] to save the service agreement.

   As a result, the new service agreement record with the specified parameters will appear in the list of the [*Service agreements*] section.

Default service agreement

In addition to the agreements with the specific service consumers, the [*Service agreements*] section must include an agreement that includes the minimum set of services, provided to any consumer i.g., a “default service agreement.”

This agreement can be used to obtain customer support service when no appropriate service agreement is found for a particular case.

The default service agreement should be specified in the “Default service agreement” (DefaultServicePact) system setting.

Add service objects to SLA

Information about the service objects is represented on the [*Service recipients*] detail of the service agreement page.

To specify service objects for a service agreement:

1. Open the [*Service agreements*] section, select the needed record and click [*Open*].
2. Add accounts and contacts to the [*Service recipients*] detail:
    a. Click + → [*Account*] or [*Contact*].
    b. In the window that opens, select the needed account or contact and click [*Select*].
3. Add departments of the service recipient accounts, if only specific departments can use this service level:
    a. Select an account under [*Service recipients*], then click ⋮ → [*Select department*].
    b. In the window that opens, select the departments that will receive services under the service agreement → click [*Select*].
4. Click [*Save*] on the service agreement page.

As a result:

- Creatio will use the information on the [*Service recipients*] detail when selecting a service agreement on the case page.
- If you added departments, a record for each selected department will appear on the [*Service recipients*] detail. The service agreement will be valid for the selected departments only.

Add services to SLA

Set up a list of services provided under a service agreement on the [*Services*] detail of the service agreement page.

To add a service to a service agreement:

1. Open the [*Service agreements*] section, select the needed record and click [*Open*].
2. Go to [*Contract provisions*] → [*Services*] → click + . A lookup window opens, displaying a list of all services from the [*Services*] section.
3. Select the services provided under this service agreement and click [*Select*].

    As a result, the service(s) will be added to the [*Services*] detail list with the default terms of service provision.

Modify service provision terms in SLA

Services are added to the service agreements with their default terms of provision: calendars, response, and resolution deadlines. You can modify the terms within the framework of a specific SLA:

1. Open the [*Service agreements*] section, select the needed record and click [*Open*].
2. Select a service on the [*Services*] detail, click ⋮ → [*Edit*]. A [*Service in service contract*] page opens.
3. Specify the service provisions within the selected service agreement:

Service	Name of service provided under the selected agreement. It is defined after adding the service to the agreement. This is a non-editable field.
Response time	Estimated response and resolution time used for processing service-related cases under the corresponding service agreement. By default, the fields are populated with the response and resolution time values specified on the service page of the [*Services*] section. However, you can set other values for the selected service. Creatio will use the entered data to calculate the response and resolution time values for cases under the selected service agreement.
Resolution time	
Status	Status of the service provided under the selected service agreement.
Calendar	The calendar that is used for providing services under the selected service agreement. If this field is empty, Creatio will calculate the case-related response and resolution time values using the calendar specified in the [*Calendar*] field of the service agreement page.

4. Click [*Save*].

   As a result, Creatio will use the information of the [*Services*] detail when selecting customer service provisions and calculating the response and resolution time for cases.

Set service providers for UC

If you add an “Underpinning contract” in the [*Service agreements*] section by selecting “UC” on the [*Type*] field, additional fields for entering information on the subcontractor service provider become available in a separate [*Service provider*] group on the [*Contract provisions*] tab of the service agreement page:

- Populate the **Service provider → Account** field by specifying the company that provides services under the corresponding service agreement. If you populate the [*Contact*] field, the [*Account*] field will be automatically populated with the account specified on the page of the selected agreement.
- Populate the **Service provider → Contact** field by specifying the contact person of the supplier that you work with under the agreement. If you populate the [*Account*] field, the contact lookup will contain contacts of the selected company only.

Manage configuration items (CI)

PRODUCTS: SERVICE ENTERPRISE

Creatio implements the "Configuration management"/"Asset management" ITSM process in the [*Configuration items*] section. Use this section to manage information about your configuration items (CI) to keep them operational and maintain the high quality of the service delivery.

> **Note.** A "configuration item" in Creatio represents some form of software or hardware that affects the provided IT services.

Add configuration items

1. Open the [*Configuration items*] section and click [*New*] in the section list.
2. Populate the configuration item page:

Name	Name of the configuration item.
Category	Configuration item category, for example, "Peripherals" or "Software."
Type	Configuration item type, for example, "Printer" or "Operating system." A list of possible values for this field depends on the selected configuration item. Configuration item type dependency on the category is defined in the [*CI types*] lookup.
Model	Model of the configuration item. A list of possible values for this field depends on the type of the selected configuration item. Configuration item model dependency on the category is defined in the [*CI models*] lookup.
Status	The current status of the configuration item, for example, "Active" or "Under maintenance."
Inventory number	Configuration item inventory number defined by the company to manage infrastructure items.
Serial number	The serial number of the configuration item as specified by the manufacturer.

3. On the [*General information*] tab, populate additional information related to the configuration item, such as the information about the CI users and components:

Owner	Creatio user responsible for updating the information on the configuration item.
Parent CI	The configuration item that has the current CI as one of its components. When you save the record, the current configuration item displays on the [*Components*] detail of the configuration item selected in the field.
Purchased on	The purchase date of the configuration item.
Warranty valid until	The expiry date of the warranty period of the configuration item.
Retired on	Date when the configuration item goes out of service.

4. On the [*Location*] detail, specify the location of the configuration item. This data enables tracking the movement of the configuration item at different periods:

<table>
<tr><td>Country</td><td rowspan="4"> The location of the configuration item. The [State/province] and [City] fields are connected to the [Country] field. For example, the [Country] field will be populated automatically when you populate the [City] field. Similarly, if you enter a state, Creatio will populate the [Country] field automatically. When you populate the [Country] field, the [State] and [City] fields will display only those states and cities that correspond to the selected country. You can associate a state/province with a certain country in the [States/provinces] lookup and associate a city with a country – in the [Cities] lookup. </td></tr>
<tr><td>Region</td></tr>
<tr><td>City</td></tr>
<tr><td>Street</td></tr>
<tr><td>Start</td><td rowspan="2">The time when the configuration item is on the location.</td></tr>
<tr><td>End</td></tr>
<tr><td>Address</td><td>The full address of the configuration item location. Creatio populates the field automatically based on the information in the [Country], [Region], [City], [Street] fields/ You can change the field value manually.</td></tr>
</table>

5. On the [*Users*] detail, specify the list of the main users of the configuration item. The list of CI users can include contacts, accounts, or departments.
   a. Click + → [*Account*] or [*Contact*].
   b. In the window that opens, select one or more accounts → click [*Select*]. As a result, the selected account will be added to the [*Users*] detail list.
6. Add department of an account if the CI is used by separate departments only:
   a. On the [*Users*] detail, select an account, then click ⋮ → [*Select departments*].
   b. In the window that opens, select the departments that use the configuration item → click [*Select*].

7. On the [*Components*] detail, specify the list of configuration items that comprise the current CI.

   a. Click the + → [*Related component*] to add a component that affects the functioning of the current configuration item. When the related component is added, the current and related configuration items will be automatically connected on the [*Connected configuration items*] detail on the [*Connected to*] tab.

   b. Click the + → [*Component*] to add a component that is a part of the current configuration item. The current configuration item and the component will not be automatically connected through the [*Connected configuration items*] detail.

8. Select a record → click [*Select*]. As a result, the current configuration item will be specified as the parent for the added components.

   > **Note.** A configuration item can only be a component of a single configuration item.

9. On the [*Attachments and notes*] tab, add additional information about the selected configuration item. Read more >>>

10. Click [*Save*] to save the configuration item record.

    As a result, the new configuration item record with the specified parameters will appear in the list of the [*Configuration items*] section.

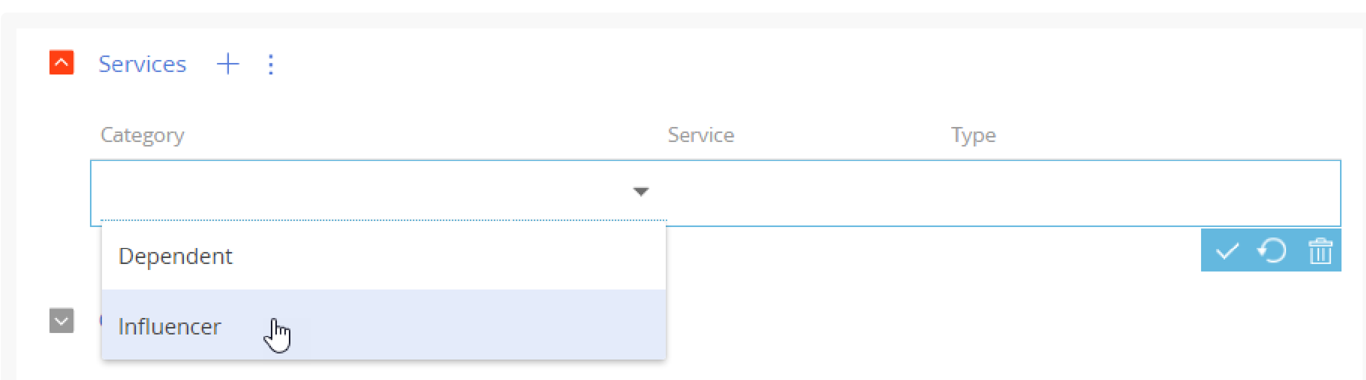
Link assets with services to create a service model

A **service model** is a diagram that displays dependencies between various elements in the IT infrastructure. The model is based on the connections between the services and the configuration items.

To create a service model for a configuration item:

1. In the [*Configuration items*] section, open the record to specify the services and connected configuration items.
2. Click the [*Connected to*] tab.
3. Click + on the [*Services*] detail. A new record with blank fields will appear on the detail.
4. Select the connection category with the service in the [*Category*] field (Fig. 1):

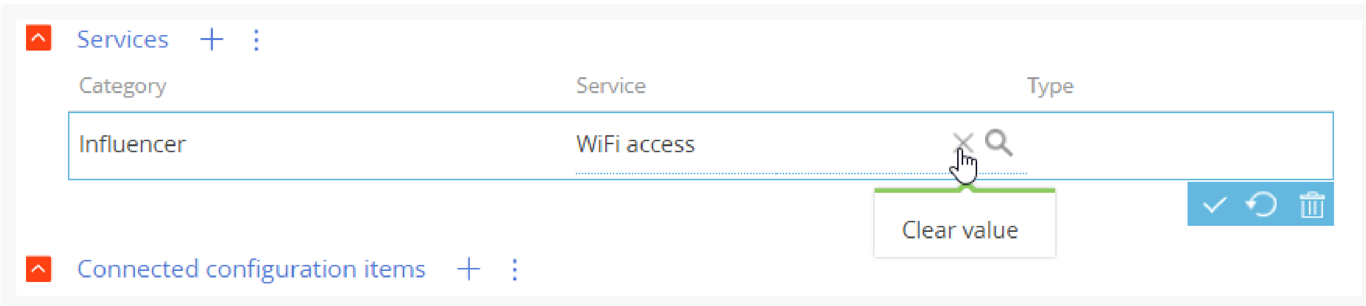
Fig. 1 Selecting the connection category



1. Select the "Dependent" connection category to add a link to a service, whose delivery depends on the current configuration item.

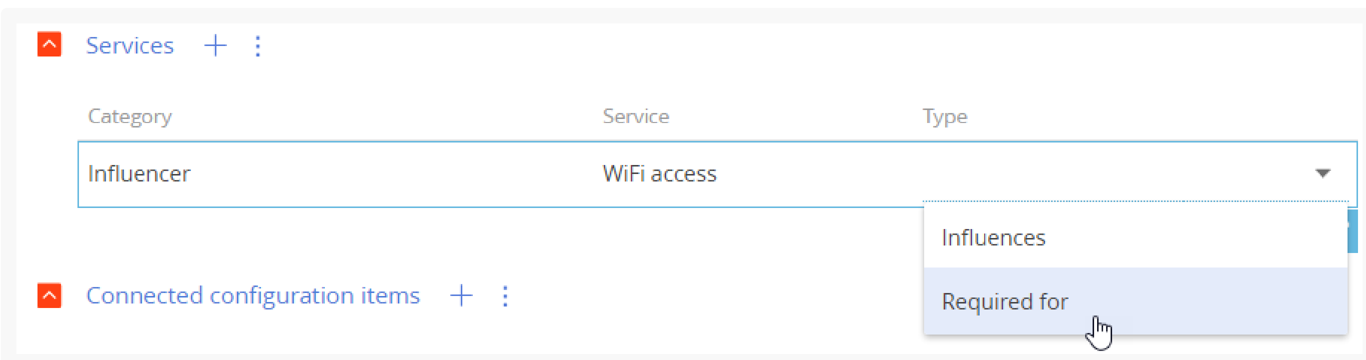
2. Select the "Influencer" connection category to add a link to a service whose operation affects the current configuration item.
3. In the [*Service*] field, select the linked service. For example, the "WiFi access" service depends on the "Router" configuration item (Fig. 2).

Fig. 2 Selecting the connected configuration item



4. In the [*Type*] field, select a short description of connections between the current configuration item and the selected service. For example, the "Required for" connection type can be specified for the "WiFi access" service and the "Router" configuration item (Fig. 3).

Fig. 3 Selecting the connection type



As a result, you will create a **connection** between the service and the configuration item. If you selected the “Influencer” category, the corresponding service will have an **inverse relation** (i.e., “Dependent”) on the [*Connected to*] tab of the [*Configuration items*] detail. The [*Type*] field of the inverse relationship will be automatically populated with the inverse connection type according to the “**Object dependency type**” lookup content. For example, if the type of the connection is “Required for,” the inverse relation is “Installed on.”

5. Specify other connections to the configuration items.
6. Add connections to the relevant configuration items by clicking + on the [*Connected configuration item*] detail. The procedure for linking configuration items is similar to that of linking services (see steps 3-6).
7. If required, open the [*Services*] section and add the missing connections between the services.

   As a result, Creatio will add connections between the services and configuration items which make the visual display of the service model possible when handling the cases or planning the changes.

Manage problems

PRODUCTS: SERVICE ENTERPRISE

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Creatio implements the "Problem management" ITSM process in the [*Problems*] section. Use this section to manage registered problems and plan the working time for problem resolution. Effective problem management decreases the influence of cases on service performance and prevents further cases.

A “problem” is the root cause of one or more occurred (possible) cases. For example, frequent breakdowns of a certain product node can be identified as a “problem.”

Identify problems

Identify problems by analyzing multiple similar incidents and determining their common cause. Multiple incidents linked to the same service or configuration item, indicate a problem with that element of the IT infrastructure or the elements it depends on. To identify the faulty element:

- Check the values of the [*Service*] and [*Configuration item*] fields on the incident page.
- Check the dependencies of the incident service and configuration item using the service model on the case page.

Once the problem has been identified, proceed with the problem registration:

1. Add a new record in the [*Problems*] section. There are several ways you can do so:
   a. Go to the [*Problems*] section and click [*New*].
   b. To add a problem from the incident page, go to the [*Closure and feedback*] tab → [*Problems*] → + → [*New*].
2. Populate the fields on the problem page:

Subject	Brief description of the problem.
Description	Detailed description of the problem. For example, specify the circumstances that contributed to the problem cause or its influence on service availability.
Owner	Service team member who is responsible for resolving the problem.
Assigned team	Group of specialists within the department who are responsible for resolving the selected problem. You can customize user groups as the elements of the organizational structure in the [*Roles and users*] section.
Priority	Relative importance of resolving the problem.

3. Populate the fields on the [*Problem profile*] tab of the problem page:

Type	Select the problem type, e.g., "Known error" or "Problem".
Service	Specify the service where the problem is. Resolving the problem would require making changes to this service.
Configuration item	Specify the configuration item where the problem is. Resolving the problem would require making changes to this CI.

4. Add incidents that are caused by the problem to the [*Cases*] detail by clicking [*Problem profile*] → [*Cases*] → + and selecting checkboxes next to the corresponding incidents.
5. Click [*Save*].

   As a result, a new problem record will be created. And the incidents caused by the problem will be added to the [*Cases*] detail of the problem page.

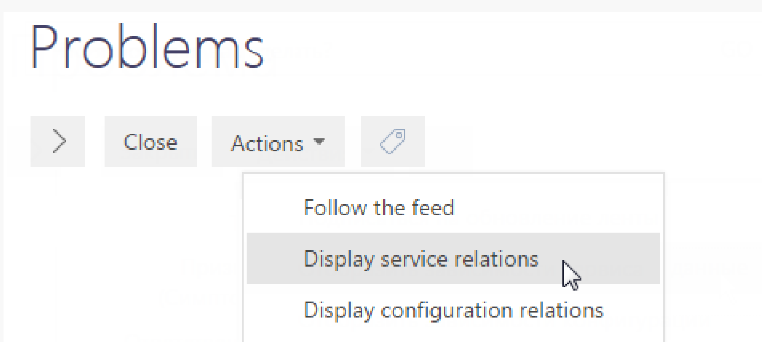
Determine the scope of a problem

Because of the complexity and interdependence of various elements in the IT infrastructure, the scope of a problem may be larger than simply the cases connected to the faulty service or CI. Use the service model to check other infrastructure elements that may be affected by the problem. As a result, additional incidents may be linked to the problem.

To view relations between a service and a configuration item:

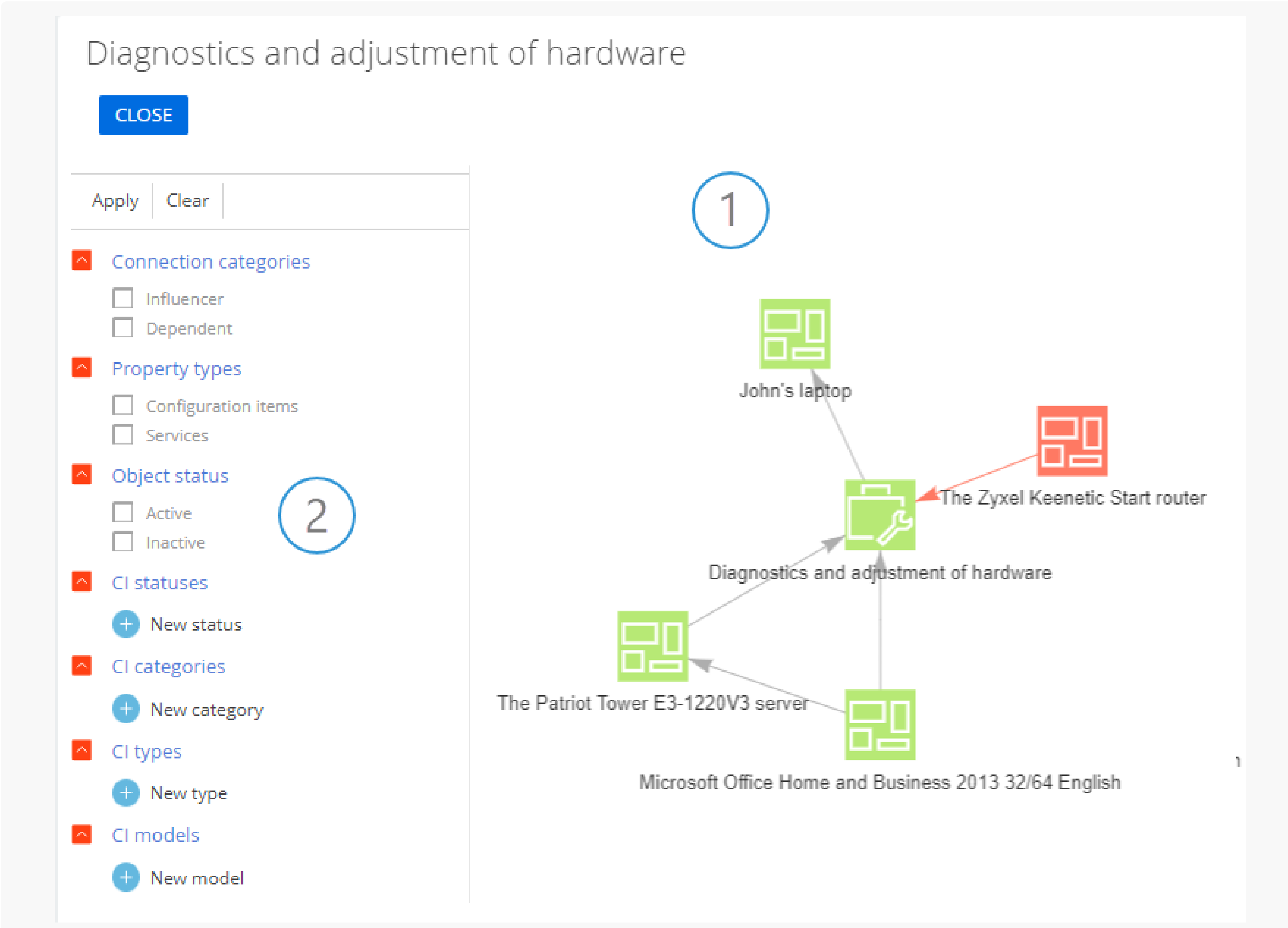
1. Open the [*Problems*] section.
2. Select a record in the section list and click [*Open*].
3. In the [*Actions*] menu of the problem page, select the [*Display configurations relations*] or [*Display service relations*] option (Fig. 1).

Fig. 1 The [*Display service relations*] action



As a result, a service connection diagram for the selected IT infrastructure item will display (Fig. 2).

Fig. 2 Service connections within the model



1. The [*Display service relations*] action opens a connection diagram for the service specified in the [*Service*] field of the problem page.
2. The [*Display configuration relations*] action opens a connection diagram for the configuration item specified in the [*Configuration item*] field of the problem page.

   As a result of using the connection diagrams, a service team specialist can define which IT infrastructure items cause the current problem. The faulty item of the IT infrastructure is considered the most probable reason for service delivery failure.

   Note. Learn more about working with the connection diagram in the "Use service model for case management" article.

Resolve and close problems

The problems are resolved by finding temporary workarounds or making changes to the IT infrastructure. Once a solution to a problem is implemented, the problem management process requires that the corresponding problem is marked as "resolved" and eventually – "Closed."

To do so:

1. Open the resolved problem page. There are several ways you can do this:
   a. Go to the [*Problems*] section, select the needed record, and click [*Open*].
   b. To open a problem from the change page, go to the [*Classification*] tab → [*Problems*] and click the needed problem record.
2. In the [*Status*] field of the problem page, select the needed status:
   a. Select “Resolved” when the change has been implemented, or if a workaround has been accepted temporarily.
   b. Select “Closed” when you have a confirmation that the problem has been eliminated as part of a change.
3. Populate the fields on the [*Resolution*] tab:

Resolution	Describe how the problem was resolved as a result of the change.
Actual resolution time	Date when the problem was resolved.
Closed on	Date when the problem was finally closed.

4. Click [*Save*].

Manage changes and releases

PRODUCTS: SERVICE ENTERPRISE

Creatio implements the "Change management" ITSM process in the [*Changes*] and [*Releases*] sections.

Use the Changes section to register all changes emerging from the IT infrastructure and affecting the provided services. You can also classify the changes by source or goal, track changes implementation, and define the final information about actual working hours.

Use the [*Releases*] section to plan the implementation of changes to your IT infrastructure.

Plan changes

In Creatio, you register changes to resolve the problems identified as part of the problem management process. When making changes in the IT infrastructure, it is vital to adequately estimate all possible risks. Making a change to an item in the infrastructure may affect the availability of other configuration items and services.

Relationships and interdependencies between services and configuration items form a common service model, which enables analyzing possible consequences of changes to any of the IT infrastructure components.

To plan the changes to the IT infrastructure, add a record to the [*Changes*] section:

1. Open the [*Changes*] section → click [*New change*].
2. Populate the change page:

Subject	Brief description of the change. This is a required field.
Description	A detailed description of the change.
Status	Current status of the change. For example, "New" or "In progress". This is a required field.
Priority	The relative importance of the current change. For example, “Low,” “Medium,” “Critical,” etc.
Number	The number of the change. Creatio automatically generates numbers in accordance with a specified pattern. Use the “Change number mask” (ChangeCodeMask) system setting to customize the automatic numbering of the changes. This is a non-editable required field.
Owner	The name of the employee responsible for change implementation.
Assigned team	A group of employees responsible for change implementation. The field lookup contains the list of administration objects: users and user groups. You can customize user groups as the elements of the organizational structure in the [*System users*] section.

3. On the [*Classification*] tab, populate information about the classification feature of the change.

Goal	The goal of the change. For example, "Innovations and improvements" or "Adjustments."
Category	Change category. For example, "Standard" or "Emergency."
Release	That will include the change.
Source	The origin of the change. For example, select "Customer" if you register the change based on a customer case or select "Legislation" if the change assumes regulated corrections.
Author	The user who registered the current change.
Reported on	Date and time when the change was registered. The field is non-editable and is populated automatically with the current date and time.

4. On the [*Configuration items*] detail, specify the list of configuration items connected to the change. This detail displays information from the [*Configuration items*] section. To connect a configuration item to the change, populate the [*Change*] detail on the [*History*] tab of the corresponding configuration page. Click + and select the needed configuration items.
5. On the [*Services*] detail, specify the services connected to the current change. This detail displays information from the [*Services*] section. To connect a service to a change, populate the [*Changes*] detail on the [*History*] tab of the corresponding service page. Click + and select the needed services.

6. On the [*Cases*] detail, specify the cases that are the source for the current change from the [*Cases*] section. To connect a case to a change, fill in the [*Change*] field on the [*Resolution*] tab of a case page. Click + and the needed cases.
7. On the [*Problems*] detail, specify the problems that are used as a source for the current change from the [*Problems*] section. To connect a problem to a change, populate the [*Change*] field on the [*Resolution*] tab of the problem page. Click + and select the needed problems.
   a. To remove a problem from the list, click the needed record in the detail list → right click ⋮ → select the [*Delete*] option.
8. On the [*Execution*] tab, populate summary information about the change.

Due date	The planned date of change completion.
Estimated working time (hours)	Planned time required for the change completion.
Parent change	The change that includes the current change. For example, the "Server upgrade" change may include subordinate "OS upgrade" and "Memory boost" changes.

9. On the [*Activities*] detail, populate the tasks that are connected to the current change. This detail displays information from the [*Activities*] section. To connect an activity to a change, populate the [*Change*] field on the [*Connected to*] field group of the activity page.
10. On the [*Email*] tab, display the emails connected to the current change. To do this, populate the [*Change*] field on the [*Connected to*] detail of the email page.
11. Click [*Save*].

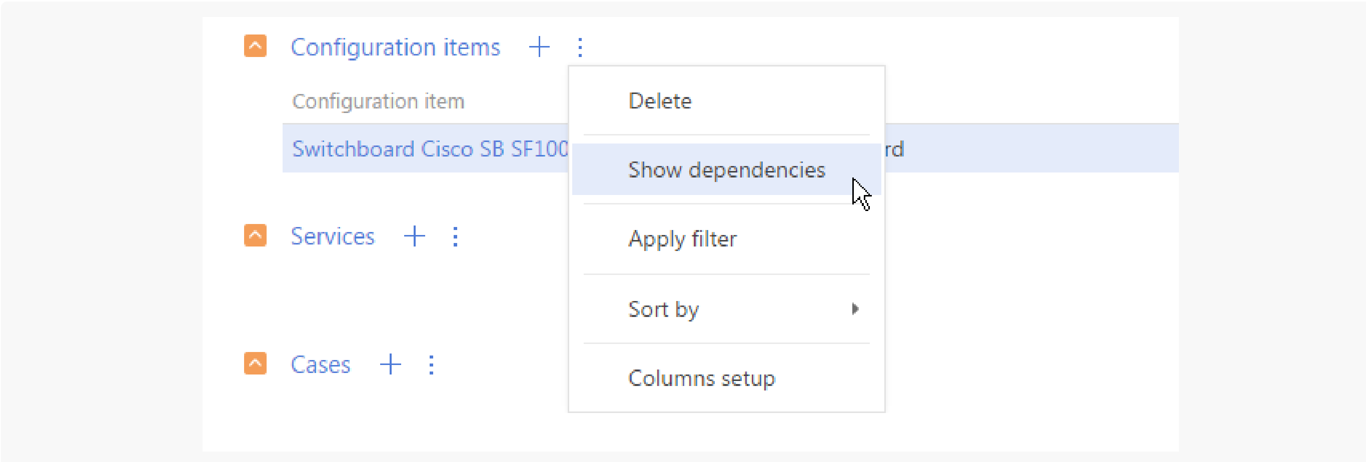
    As a result, a new change record with the connected configuration items, services, and problems will be created in the section list.

Determine the scope of a change

Use the [*Display dependencies*] action on a service or configuration item page to view the IT infrastructure items that may be affected by the change:

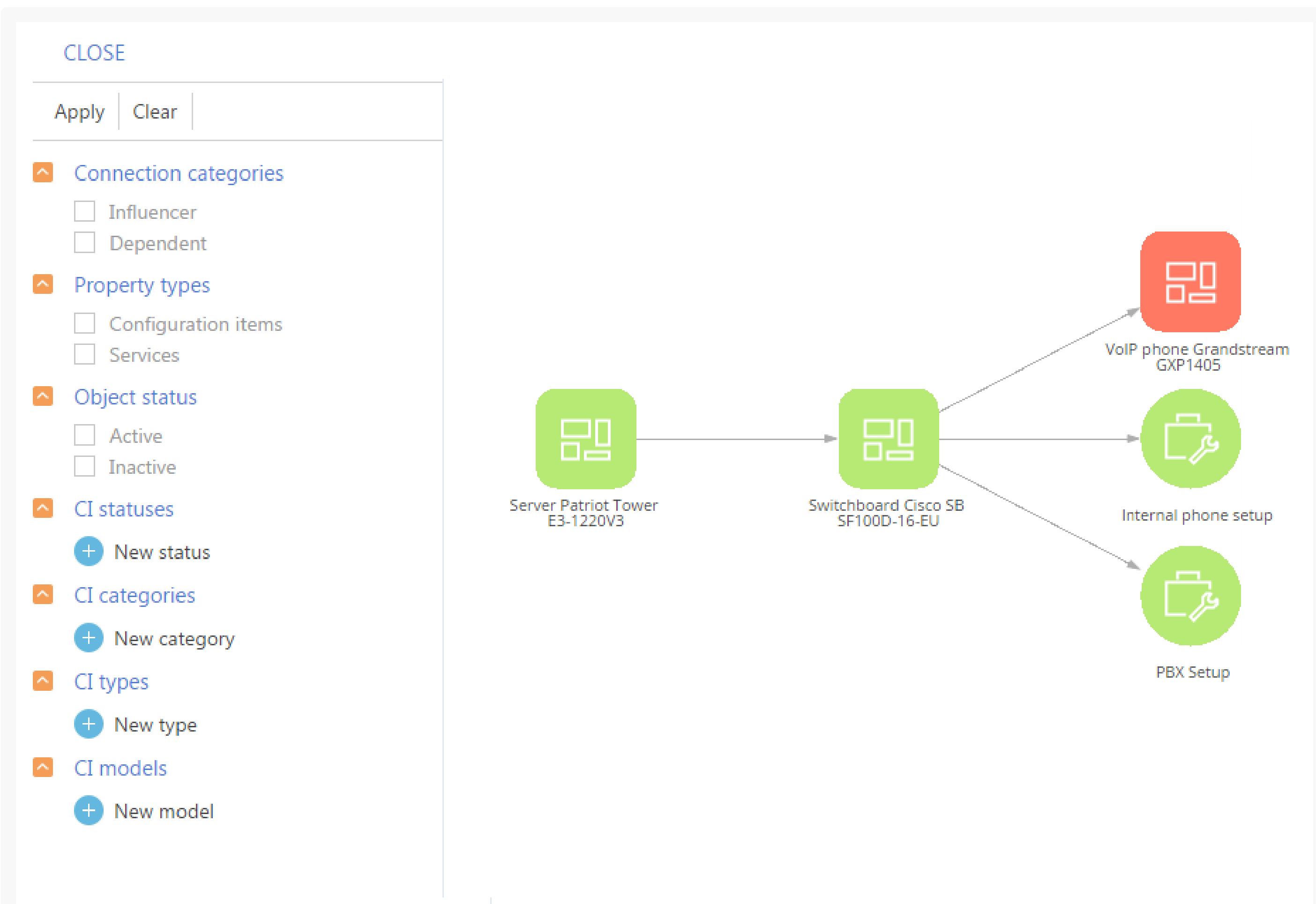
1. Go to the [*Changes*] section and open the needed record.
2. Select the configuration item or service in the corresponding detail on the [*Classification*] tab.
3. Select the [*Show dependencies*] action from the menu of the corresponding detail (Fig. 1).

Fig. 1 Displaying dependencies for a configuration item of a change record



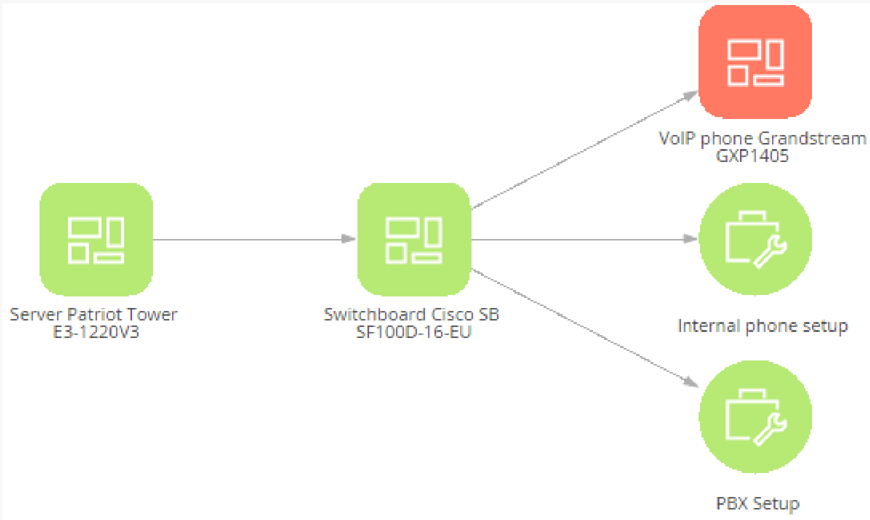
The service model diagram will open displaying the dependency connections for the configuration item or service (Fig. 2).

Fig. 2 Service model connections view for changes



The diagram displays all incoming and outgoing dependencies of the selected configuration item or service. The item at the center of the diagram represents the current configuration item or service. The influencer services and configuration items are to the left, the depending ones are to the right. For example, the diagram (Fig. 3) shows that the switchboard depends on the server, while the "PBX setup" and "Internal phone number setup" services depend on the switchboard.

Fig. 3 Configuration item connections example



In this case, when planning a change to the switchboard configuration item, you can easily see which depending services (i.e. “PBX setup” and “Internal phone number setup”) and configuration items (i.e. “IP phone”) may be affected.

Note. Learn more about working with the connection diagram in the “Use service model for case management” article.

Release changes

Use the [*Releases*] section to manage the updates of products and configuration items, organize the list of new versions (“releases”), monitor the release dates, and manage the list of implemented changes.

To register a new release:

1. Open the [*Releases*] section and click [*New release*].
2. Populate additional information about the release on the release page that opens:

Number	The number of the release. Creatio automatically generates numbers in accordance with a specified pattern. Use the "Release number mask" (ReleaseCodeMask) system setting to customize the automatic numbering of releases. This is a non-editable field.
Title	Name of the release.
Description	Short description of the release. The list of all requests fulfilled in the current release.
Status	Current status of the release, for example, “Planned”, “Development” or “Released”.
Priority	Comparative importance of the release.
Type	Type of the release, for example, “Major”, “Minor” or “Emergency fixes“.

3. On the [*Release profile*] tab, add information about CIs and services involved in the current release:
4. On the [*Configuration items*] detail specify the configuration items that are either updated within the release or connected to it. The detail displays information from the [[*Configuration items*] section](). The information about releases connected to the CI is displayed on the configuration item page, on the [*Releases*] detail of the [*History*] tab. Click + and select the needed configuration items.
   a. To remove a CI from the detail, click the needed record in the detail list → right click ⋮ → select the [*Delete*] option.
5. On the [*Services*] detail, specify the services that are either updated as part of the release or connected to it. This detail displays information from the [[*Services*] section](). The information about releases connected to the service is displayed on the service page, on the [*Releases*] detail of the [*History*] tab. Click + and select the needed services.
6. On the [*Team*] detail, specify the list of contacts and accounts that are involved in the release on certain stages.

Stage	Release stage, for example, “Development“ or “Testing“.
Assignee / Assigned team	One or several employees that are involved in the release. The field lookup contains the list of administration objects: system users and user groups.

7. On the [*Planning and implementation*] tab, add information about the scheduled release date, the estimated working time and the team.

Scheduled release date	Estimated date of the release.
Estimated working time (hours)	Working time pre-required to complete the release.

8. On the [*Scheduling*] detail, add all scheduled release stages:

Stage	Release stage, for example, “Development“ or “Testing“.
Start	Planned date and time for the release stage.
End	

9. On the [*Activities*] detail, create a list of tasks for the release implementation.
10. On the [*Changes*] detail, specify the list of changes that were the basis of the release. The detail displays information from the [*Changes*] section. To connect a change to the release, populate the [*Release*] field of the change page.
11. Click [*Save*].

As a result, a new release record with the connected Creatio objects will be added to the section list.