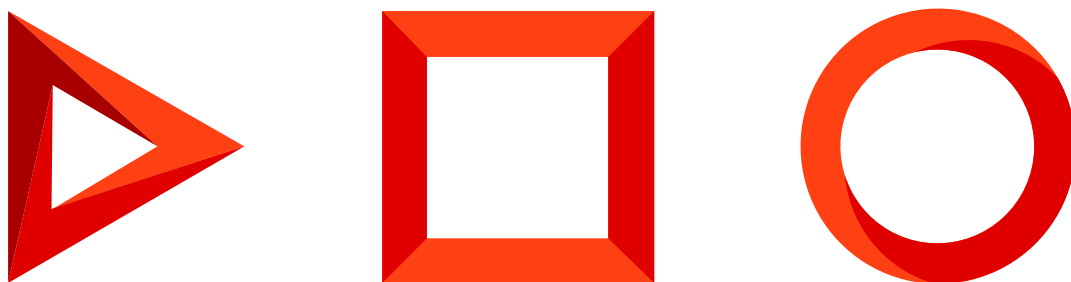


Configuration items

Manage configuration items (CI)

Version 8.0



This documentation is provided under restrictions on use and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this documentation, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

Table of Contents

Manage configuration items (CI)	4
Add configuration items	4
Link assets with services to create a service model	6

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 [<i>CI types</i>] 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 [<i>CI models</i>] 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 [<i>Components</i>] 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:

Country	The location of the configuration item.
Region	The [<i>State/province</i>] and [<i>City</i>] fields are connected to the [<i>Country</i>] field. For example, the [<i>Country</i>] field will be populated automatically when you populate the [<i>City</i>] field. Similarly, if you enter a state, Creatio will populate the [<i>Country</i>] field automatically.
City	
Street	
Start	The time when the configuration item is on the location.
End	
Address	The full address of the configuration item location. Creatio populates the field automatically based on the information in the [<i>Country</i>], [<i>Region</i>], [<i>City</i>], [<i>Street</i>] fields/ You can change the field value manually.

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.
- Click **+** → [*Account*] or [*Contact*].
 - 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:
- On the [*Users*] detail, select an account, then click  → [*Select departments*].
 - 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.

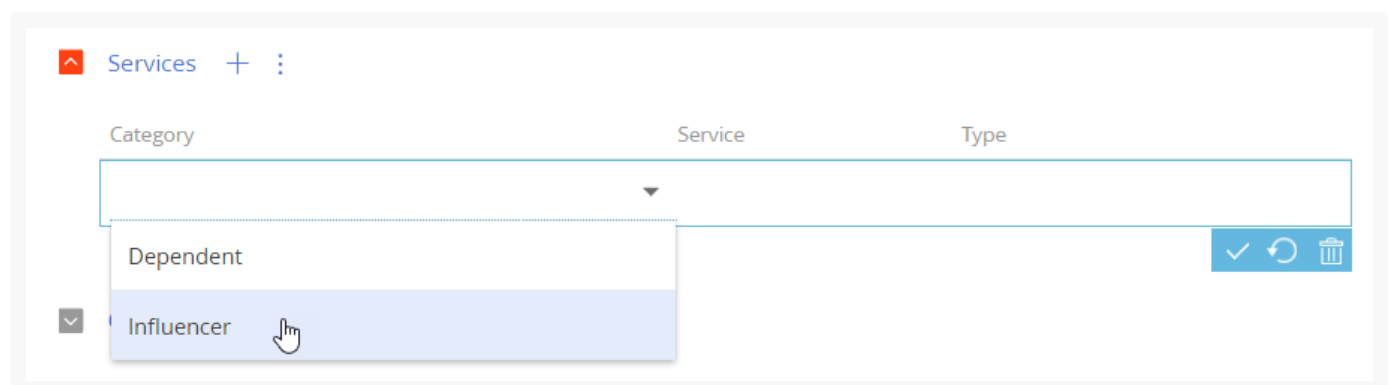
Link assets with services to create a service model

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](#)):

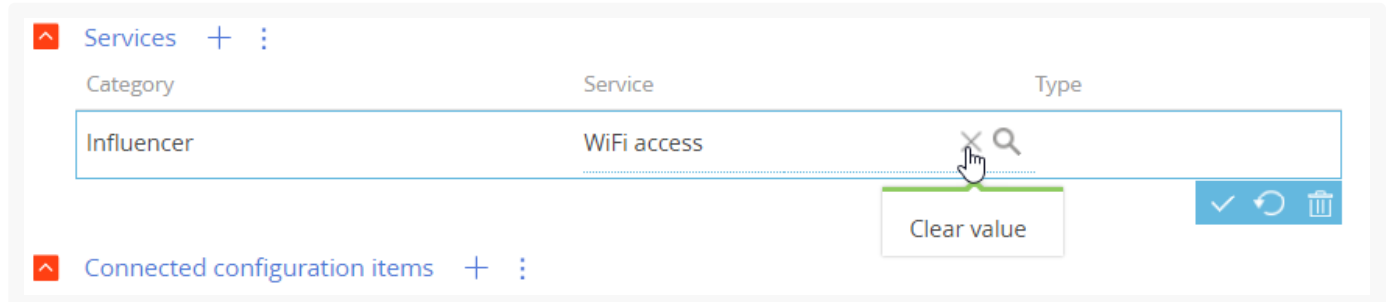
Fig. 1 Selecting the connection category



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

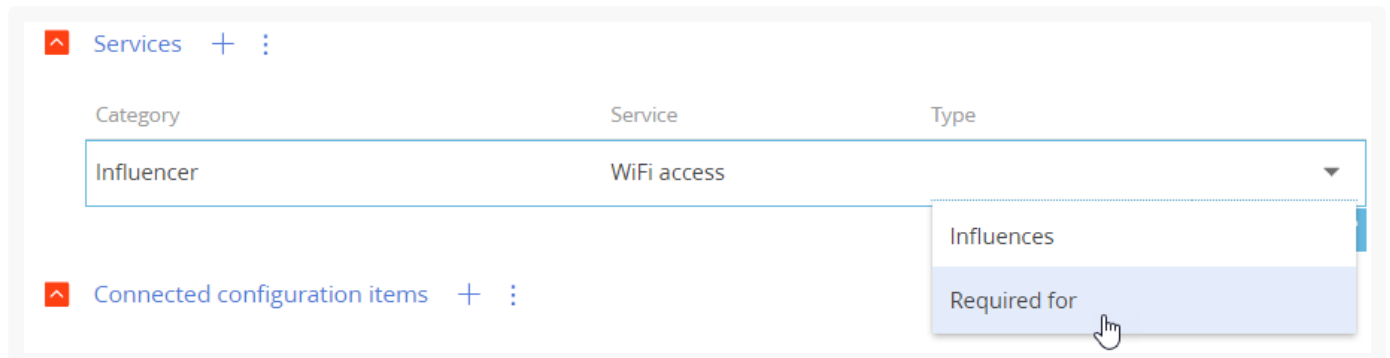
2. Select the "Influencer" connection category to add a link to a service whose operation affects the current configuration item.
3. In the [*Service*] field, select the linked service. For example, the "WiFi access" service depends on the "Router" configuration item ([Fig. 2](#)).

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.