Services

Manage service catalog

Version 8.0

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Table of Contents

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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).
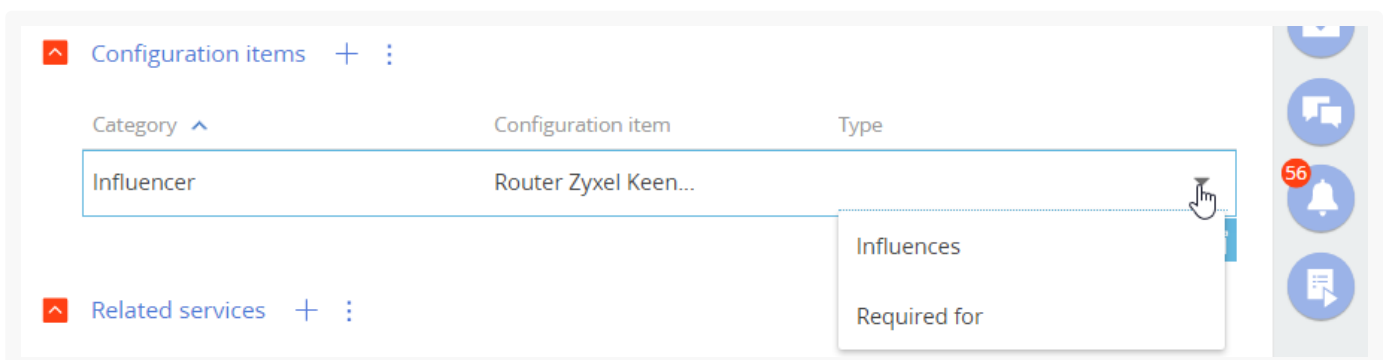
Fig. 1 Selecting the connection category
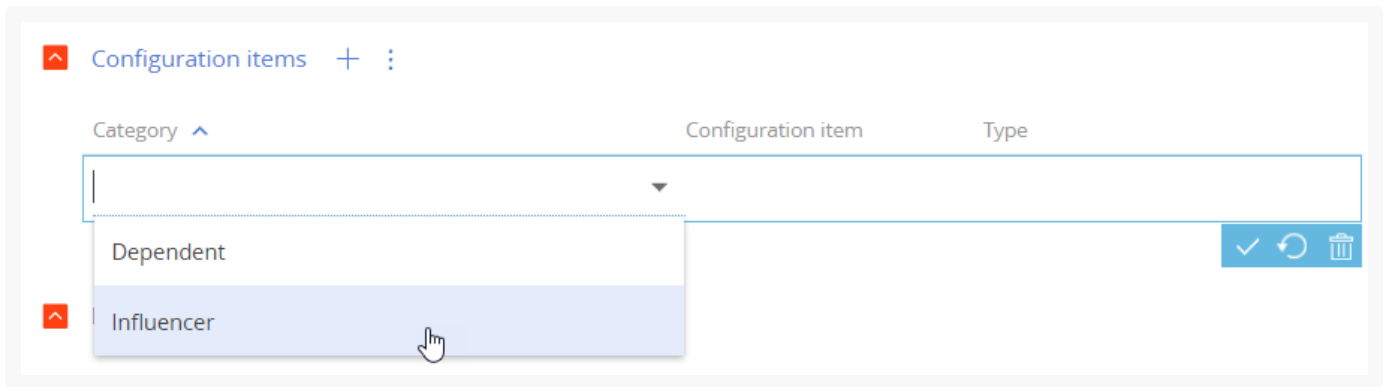
1. Select the "Influencer" connection category to add a link to a configuration item that affects the current service delivery.

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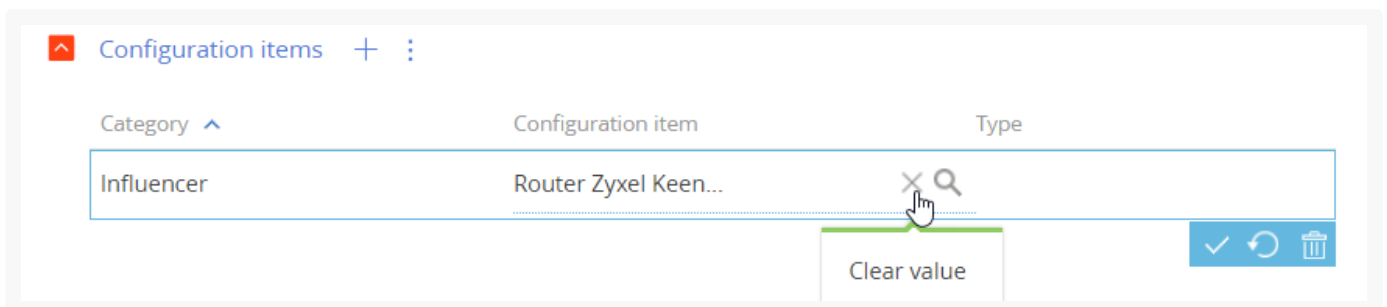
4. In the [*Type*] field, select a short description of connections between the current service and the selected configuration item. For example, the "Required for" connection type can be specified for the "WiFi access" service and the "Router" configuration item (Fig. 3).

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.