



# Citsmart ITSM Features

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## Citsmart ITSM

**Citsmart ITSM** was created in 2011, by Central IT team, as a way to show fast and efficient management models, according with Information Technology Infrastructure Library (ITIL) for managing IT services.

It is a platform of information technology governance, created to manage the IT services in the organizational environment. The platform provides a smart concept of unity and practicality in corporate management.

Citsmart is an integrated solution developed to manage any request for services or workflow. With a focus on providing information technology governance, it was designed to give greater speed and effectiveness in the business management using the best practices, corporate performance strategies and innovative methodologies.

The solution was designed to meet the most stringent criteria for PinkVERIFY, a seal that endorses software tools based on service management processes proposed by ITIL.

Citsmart ITSM is the only solution in Latin America that is certified in thirteen processes by PinkVerify such as Incident Management, Request Fulfillment, Knowledge Management, Service Catalog Management, Service Level Management, Change Management, Release Management Problem Management, Configuration and Asset Management, Service Portfolio Management, Availability Management, Event Management and IT Service Continuity Management.

For more information about Citsmart - ITSM access our portal: [www.citsmart.com.br](http://www.citsmart.com.br).

For more information about Pink Elephant certification please visit: [www.pinkelephant.com](http://www.pinkelephant.com).

Citsmart - ITSM is an integrated solution developed to manage any request for services or workflows. The platform focus on providing information technology governance, it was designed to give greater speed and effectiveness in the management of the business through the use of best practices, corporate performance strategies and innovative methodologies developed by highly skilled professionals.

Citsmart was planned to meet the more stringent criteria from PinkVERIFY, a seal that endorses software tools, which are based in the 15 proposed service management processes by ITIL. Citsmart is the only platform in Latin America to have thirteen certifications.

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For more information about Pink Elephant certification please visit: [www.pinkelephant.com](http://www.pinkelephant.com).

## Process Management

### Service Catalogue Management

- Allows the registration of service information (with possibility of release) and situation control (active and inactive);
- Guarantee the production and maintenance of service catalogs and manage their information;
- Giving the values and costs of services;
- Allows inclusion of new services to the catalog;
- The Integration between Services Catalogue with service requests;
- Allows the definition of services and the registration of services and description of its attributes;
- Allows configuration of services to meet the specific needs of customers, by associating configuration items (CI's) that support these services (design of CI's and the connections for provision of the services);
- Enables the Organization of services in groups or hierarchical structures that can be used to assemble customers and business packages of services;
- Facilitates the management of service Status. For example: differentiate the services versus services in production design;
- Allows the integration between it service catalog and Service Desk or incident management systems;
- Show the technical components (Configuration Items CI's) that are used to provide any particular service;
- Allows the requestor to monitor the status of the request;
- Provides information for the Internal Contracts Management (Operational level agreements or OLA);
- Measure the compliance of applications against service level agreements;
- Allows a service vision that have involvement of the supplier, and its performance;
- Allows you to check the service history for audit.

## Service Level Management

- Allows the registration of information for the planning, implementation and verification of monitoring of service levels;
- Details of contents of the service level agreement registration, including date of the contract, scope, and objectives;
- Grant adjust: differentiated Goals/Targets, details of Operational level agreements (OLA), customer data, service provider information (internal and/or external);
- Maintenance of Customer and supplier information (Include, change, delete, and query for registration information);
- Service Level Agreement Management (SLA);
- Creation and maintenance of service level Agreements;
- Manage the services provided by contract as defined in the service level Agreement;
- Enables automatic monitoring of service levels delivered based on service level agreement (SLA);
- Identifying impact on service level Agreements, as clients VIP (company areas);
- Allows different priorities escalation for areas of the company;
- Send notifications and create escalations beyond pre-configured times service level agreements;
- Allows the monitoring of Operational level agreements (OLA) and vendor performance metrics;
- Shows where service level Agreements, Operating Level Agreement and subcontracts are in effect (or not) for a particular service;
- Allows the Configuration Item's relationship with all services which depend on (Ex: depends on the print server, depends on an internet server, depends on a file server, etc.);
- Identifying the way the services are setted.
- Registration of Quality Plan for improvement of services;
- Customer service monitoring based on the service level agreement;
- Generation of reports that demonstrate the relationship between clients and services, allows the visualization of how customers use the services.

- Allows you to measure the performance of the services provided by the technical staff and suppliers according to the Operational level agreement (OLA) for monitoring and verification of the work of the team and suppliers;
- Allows you to enable/disable the link of the service level agreement with the service;

## Incident Management

- Manage all Incident life cycle;
- Possibility to associate workflows to incidents;
- Allows the opening, modification and closure of incidents only by authorised persons.
- Allows the contact source to be recorded from the request registry interface;
- Allowsthe attachment any files (.doc, .xls, .jpg, .PDF, and among others);
- Create a service request/incident from another request (daughter request);
- Direct requests for responsible groups for solving the incident;
- Creation of sub requests;
- You can schedule task (s) to attend later;
- Assign a single reference automatically to the registry at the time of opening of the incident;
- Incident Reclassification;
- Occurrences registration;
- Delegation/share the incident to a support group, Department or individual;
- Suspension/reactivation of a service request/incident;
- Integration with service level agreement (SLA) to monitor and control the response time and resolution of incidents based on priority and/or services levels;
- Integration with problem management to facilitate the opening of a problem, the creation and maintenance of relations connected between the incident and Problem;
- Integration with change management to facilitate the opening of change request (CR) of a record of incidents and also check the possible incidents that may occur because some change;
- Integration with knowledge management to support the investigation of incidents (for example: script), diagnosis and resolution (for example: work around, temporarily correct, correction of routine incidents);

- Integration with Asset and configuration management to allow the Service Desk to identify, investigate and diagnose incidents based on items related to the same configuration;
- Displays the CMDB (configuration management database) on the same interface to incident management;
- Allows verification of opening more than a call to the same user or equipment, avoiding the creation duplicated requests;
- Automatic incidents prioritization and escalation based on categorization records;
- Allows you to automate the classification of incidents via interaction with it service catalog management module;
- Priority, impact, and urgency (severity) indicators in the incident records;
- Priority calculation based on impact and Urgency factors defined automatic
- Automatic escalation of incidents based on affected users;
- Allows the automatic routing of group incidents or service teams;
- Prioritize, mark and scale automatically based on the incidents category, or the type of affected user (including the concept of VIP users);
- Allocation of hours when created and updated the registry of incidents;
- Integration with email systems;
- Automation of notifications to keep users informed about possible problems or progress;
- Sending email notification for the request user about all updates that have occurred since the opening to the closing of the incident;
- Sending email to the requestor with a link to the application of service satisfaction survey, when the incident is resolved, to identify the level of satisfaction;
- Allows the Service Desk and support teams have access to the package of common resolutions (knowledge base) to support the investigation of incidents, diagnosis and resolution;
- Provides an audit trail of all incident logging updates to: individual record Identification upgrade; Date and time of the action; Type of action.
- Ability to separate the incidente from the service requests;
- Allows an incident can be scaled based on pre-established conditions or replace policies manually;
- Allows to perform the satisfaction survey;

- Allows you to generate alerts on changing the incident status;
- Inclusion of information in the Knowledge Base (with the correct access permissions) at any time of the request attendance;
- Monitoring of the incident attendance in real time;
- Search for incidents by status;
- A complete history of all requests/ incidents registered;
- Automatic closing of all incidents when the problem record is terminated;
- Report generation of registered incidents in a period helping to review the possible causes and impacts;
- Allows the reopening of closed request;
- Suspension/reactivation of all requests with the status "in progress" for a particular performer group responsible for attending the request;
- Allow the user to register and activate escalation rules that will be applied automatically in the classification, and notification of escalation requests of incident;
- Allows to keep the activities updated log;
- Possibility of providing remote access to users' stations via LAN/WAN network, where access is consensual (via access permission for the user) for first level, technical troubleshooting, without the need for technical shift to the location where the user;
- Integration with Asterisk for greater agility in service request /incident opening;

### Request Fulfillment

- Allows only authorized users to create and attend the requests;
- Registration and maintenance of user requests. (Open, update, cancel, query and terminate user requests);
- Accommodate sufficient fields to inform the details of the request;
- Directing of service requests to the person or team responsible for the implementation of the service;
- Automating the routing of requests to the appropriate person or team perform the service. This may include internal and external people, departments or organizations;
- Enables the creation of business rules and workflows for specific requests or requests in order to automate the processes, tasks, notifications, etc;



- Allows the monitoring of active requests to support the progress of the same in the sense of accomplishment and closure;
- Allows you to automate the Quick recording and categorizing requests. For example: a provisioning request, a request for information;
- Allows access by Web browser and mobile devices for the registration and follow-up of requests;
- Allows requests (an application submitted) the user can be canceled;
- Search registered services and categories of services;
- View the information on the opinions of requesting users, regarding the attendances provided to generate improvements.

### Knowledge Management

- Allows the registration of twin words for the purpose of research in the knowledge base (e.g. "Desktop" = "computer", "employee" = "user", "HD" = "hard disk", among others);
- Creating folders and categories that allow organization of content to facilitate access to them;
- Allows you to configure access control for writing and/or reading the document taking into consideration the user profile;
- Allows you to index the Knowledgebase to provide research for keywords;
- Automatic versioning of knowledge base documents.
- Allows navigation by folders tree;
- Relationship of knowledge to other knowledge;
- Determination of the degree of importance of knowledge to the user and/or group;
- Sending email notifications to the user and/or group when changes occur in the knowledge;
- Association of knowledge to an event;
- Allows you to attach files, pictures and links to the knowledge;
- Control of access and changes to the contents according to user access profile;
- Control of the knowledge approval process, before even being published on the portal to ensure that only relevant content will be posted;
- Allows you to dynamically provide the relevant documents in the knowledge base portal, allowing quick access for users;

- Allows users to post comments about the content seen in the knowledge base;
- Provides search results in the knowledge base that includes the relevancy of the document through the score and qualification held by users;
- Association of incident, problem, change, configuration and release item to documents.
- Presentation of the amount of requests, incident, problem, configuration item and/or changes that are related to each document of knowledge;
- Generates reports about knowledge base documents.

### Change Management

- Enables change registration;
- Open a request for change (RFC) from one or more records of existing problems;
- Enables controlled access to the records of opening of change;
- Allows access to change module managed CMDB (Configuration Management database);
- Enables management of the lifecycle of a Request for change (RFC);
- Enables management by levels of users to a RFC;
- Associate/attach workflows to the processes of change;
- Create groups of people that support the assessment, prioritization, authorization and scheduling of changes (change advisory board (CAB));
- Allows bind configuration items (CI's) to the change records;
- Prioritize, mark and scale automatically changes records based on category of these, or the type of affected user (including the concept of VIP users);
- Manage the lifecycle of records of changes through workflows;
- Create different status of the change, including the rejection;
- Evaluate the impact of the changes as a source of information for the approval of change;
- Enables an known error and a problem when change related terminates;
- Provides calendar for scheduling and execution of the activities of the change;
- Allows scheduling of communication activities for those involved in the Request for Change (RFC);

- Allows the registration of rollback processes of changes (for rolling back changes if necessary);
- Allows you to manage risks associated with the registration of change;
- Allows integration with problem management process;
- Updating the CMDB, when there is a change in a CI;
- Allows access to the configuration management module to assist in building a record of change;
- Enables management of the operational and managerial process of change (creation, approval, evaluation, planning, execution, rollback and release);
- Access to other related to change management (Incident, Problem, Release);
- Integration with email systems;
- Send email to the user and service center, when a RFC is registered;
- Send email notification to service center regarding the progress of the change request;
- Allows the tracking of change requests for your approval or rejection;

### Release Management

- Record and change release management;
- Automatically assignment of a unique reference number for each change request that is authorized for release;
- Application date and time automatically the release of new/updated record of release;
- Allows the automated workflow;
- Visualization of the registry information of the release request;
- Monitoring the status and activities of the release;
- Allows schedule release activities;
- Classification of risk of release;
- Integration with project management for planning the deployment of the change;
- Provides a checklist for structured testing with documented requirements;
- Attach general documents;
- Control of the roles and responsibilities management;

- Provides customizable templates for appropriate aspects of the release and deployment;
- Allows integration with CI Management to help release the implementation planning, distribution and installation;
- Automatically updating the CI Management with the new settings (when a release is completed, all the related CIs are automatically updated);
- Allows keeping records about the downgrading, transfer and disposal of hardware;
- Integration with change management process;
- Provides closing client-defined categories that relate to the change;
- Allows integration with a Definitive media library for release planning and implementation of a change;
- Provide financial controls to release, for example: what resources are available, contracts and licences;
- Enables all necessary configuration items for release should be available/must be received;
- Integration with email systems;
- Sending notifications by e-mail to requestors when the release is registered and finalized.

## Problem Management

- Problem registration and management;
- Automatic generation of unique reference number;
- Set mandatory fields by the user without having to change the code;
- Clearly show the date and exact time that any assignment of teams or individuals were made;
- Facilities in identifying infrastructure components that are problematic or unstable;
- Visualization of the registry information of problem;
- Control the situation (status) and presents the activity/stage in each problem;
- Associate/attach workflows to the problems;
- Link CI's (configuration items) to the problem records;

- Enables the creation, modification and closure of problems, with proper records of date, time, user among other attributes;
- Enables routing problems between groups solvers;
- Create impact and urgency to the problem registration;
- Prioritize, mark and scale automatically based on these category problems, or the type of affected user (including the concept of VIP users);
- Track the life cycle of problem treatment;
- Create and access known errors base;
- Allows the registration of occurrences (history) for updates and status changes (diagnosis, registration, solution, solution, among others);
- Allows free text for description of the problem;
- Allows you to associate a problem to an incident, a change record
- Open a problem from an incident;
- Integration with email systems;
- Send email to the requestor and appropriate support teams, when the problem is registered and to those involved in research/public solution reached;
- Attach documents;
- Query the knowledge base;
- Allows the suspension/reactivation of a problem;
- Information visualization of problems with ongoing status, suspended and late, being these demonstrated in charts;
- Activity scheduling Problem;
- Allows you to cancel a Problem;
- Uses secure access and controlled for the CMDB that allows to search, modify and extract information related to problems;
- Allows you to solve the problem of CI's used by more than one person;
- Use of automatic procedures for incident management escalation for problem management;
- Trouble reporting and status;
- Generate reports of errors known, problems and status, and quantitative problem.

## Configuration and Asset Management

- Registration and management of configuration item (CI);
- Allows the relationship between configuration item and users, systems and/or installed applications, dependent and provided services;
- Classify the types of assets;
- Configuration items status registration;
- Adding new configuration item records;
- Giving the levels of urgency and impact on the configuration Item that helps the incident management;
- CI integration with incident management for greater speed and ease solution of incidents.
- CI integration with change management for greater control and flexibility in managing the changes of the environment;
- IC integration with problem management to increasing management efficiency, to facilitate the analysis of trends in configuration items related to incidents and identify the root cause of one or more incidents. This information is used to prevent new incidents and improve the quality of services;
- CI integration with release management to increase the efficiency of the releases using baselines to save configuration information from the configuration items before release (attributes such as version or status, for example).
- Configuration Item Auto-validation;
- Show the current status of any CI, such as enabled or disabled;
- Supports the management and use of baselines that can be used to retrieve earlier trusted versions;
- Supports the definitive media library connection to CMS/CMDB; (The definitive media can be indexed and linked to CMS/CMDB);
- Enables tracing and automatic record of the configuration items present in the infrastructure (CMDB Discovery);
- Allows you to perform remote installation of software (scheduled);
- Allows remote access to workstations using proprietary control software;
- Enables controlled access to the CMDB (Configuration Management database);
- Register the log of all changes made in the configuration items;

- Retain the history of configuration, changes, and changes to the CI's;
- Automate the environment based on the information in the CI's;
- Ability to enable the software licensing control, providing a view of the total number of licenses, the number of licenses in use and the location of the licenses in use of each software;
- Allows you to automatically identify other CI's affected when any CI is the subject of an incident, problem, and known error record or change request;
- Automatically update the version number of an CI if the version number of any one of your CI's components is modified;
- Transfer data from an CI from the development environment to the production environment;
- Check the criticality of the service related to the configuration Item;
- Check the impact analysis of configuration items;
- Generate CI Inventory reports to facilitate configuration audits;
- Enables the creation of blacklist of software for you to be notified whenever officials detected installation on any machine on the network;
- Allows the automatic inventory of all workstations on the network by capturing information about hardware and software installed, as well as registering and notifying all the changes;

## Integrated Management

### Contract Management

- Registration and administration of contracts;
- Integration with service level management;
- Insert resources and products to contracts;
- Integration between contracts and services;
- Record of Service Orders and invoices;
- Control of invoices and work orders;
- Reporting of service order;
- Generates activity report (AR) to prove that the service was delivered;

- Generates invoice report.

### Purchase Management

- Registration and management of purchase requisitions;
- Visualization and Monitoring of information purchasing requisition;
- Manage the entire process of listing of the products requested;
- Check the open requests;

### Project Management

- Record of project management;
- Allows the management and monitoring of projects;
- Define and elaborate detail the activities of the projects to be implemented over a estimated period;
- Registration of project activities on schedule;
- Registration of payment schedule;
- Allows the user to view and manipulate of the activities to be performed by him, provided that the project is already in "running" Status. (Working papers);
- Verification of registered designs information in summary form.

### Other Features

#### Citsmart Portal

- Allows the user to view the business catalog with the services;
- Service request/incidentes registration;



- Query the Knowledge Base;
- Consulting the FAQ (frequently asked questions);
- Registration of service orders;
- View opened incidents/requisition.

### Parameterization

- Allow the automation of processes based on parameters defined by users.

### Dynamic View

- Enables the creation of several system visions (screens), with possibilities of association with visions linked (subscreens).

### MetaDados

- Enables the data information loading, i.e. information from tables stored in the database.

### Templates

- Creation of visual presentation of service request.

### Reports Panel

- Allows the generation of charts and reports according to the filters chosen by the user;
- Provides in a visual way the necessary information on the procedures of the system.

### Batch Processing

- Allows scheduling automatic execution routine.

### E-mail Model

- Enables the creation of custom email templates for sending notifications.

### Report Buiding

- Allows the reports creation;

- Enables the creation of InfoCubes and Dashboards information for incident, problem, change, configuration items, Knowledge Base, service level Agreements;

### LDAP Connection

- Performs the LDAP parameter configuration;
- Enables handling of information from LDAP and Microsoft Active Directory.

### External Connection

- Create a connection to an external data source.

### WorkFlows

- Creation of workflows for the various modules of the system;
- Allows the drawing of streams (with tasks and decisions);
- Run any stream designed in the tool;
- Record and save multiple workflow processes;
- Each flow (process) may have a SLA (service level agreement) (total time control and phases – capture and resolution);
- Allows creation of tasks/activities for approval and monitoring (manual and automatic) associated with the groups.

### Audit

- Provides an audit trail for recorded information and updated (e.g. individuals or groups Ids of open records, updated and closed; dates and times of activity and status updates, types of activities).

### Integrations

#### Nagios

- Enables integration with Nagios and allows automatic opening of incidents, with automatic e-mail forwarding.

#### Asterisk

- Integration with Asterisk technology to better attend the service request;
- Enables the Support staff for a temporary branch registration, allowing the Citsmart to monitor it, capturing incoming calls. Discovery and Inventory

### Discovery and Inventory

- Allows the location of assets and configuration items in the network;
- Allows the automatic inventory of all workstations on the network by capturing information about hardware and software installed, as well as registering and notifying all the changes;
- Allows the monitoring of the implementation of the process of inventory in real time;
- Allows you to check the details of the configuration items that are captured by the inventory.