# iTop 0.9

## Administrator guide

Don’t hesitate to ask question to support@combodo.com

# Table of content

## About iTop

This document describes release 0.9 of iTop. iTop is a robust Open Source web 2.0 application that will help you to better support your IT. Development of iTop started in March 2006 in order to publish on the internet a completely open solution that would help enterprise to drive ITIL best practices implementation. Goal of the iTop community was to provide an alternative solution to very expensive solutions sold by standard software vendors.

At the early beginning of the project, the development team was focus on building the most complete CMDB (Configuration Management Data Base). One key objective was to make it as flexible as flexible in order to allow administrator to add and remove configuration items from the data model and manage as many relationships as they want. The development team also designed a powerful state machine that allows defining life cycle for whatever configuration items in the CMDB.

Realizing that all concepts developed within the CMDB can be applied to all other ITIL best practices, the iTop community decided to extend them to Incident Management, Change Management and Service Management modules. Then iTop became an IT operational portal that helps all IT management team to support their environment by:

Documenting IT infrastructures and their relationships (servers, application, network …)
Documenting IT incident and planned outages, as well as a known error database
Documenting all IT services and contracts with external providers

iTop application can be used by different type of profiles:

Help Desk
IT support engineers (1st level, 2nd level, 3rd level …)
IT service managers
IT managers

iTop application is relying on Apache, MySQL and PHP, so it can run on whatever operating system supporting those applications. It had been tested already on Windows, Linux Debian and Redhat. As it is a web based application you don't need to install client on user PC. A simple web browser is enough to use it.

## Licensing

iTop is provided AS IS with NO WARRANTY OF ANY KIND, INCLUDING THE WARRANTY OF DESIGN, MERCHANTABILITY, AND FITNESS FOR A PARTICULAR PURPOSE.

# Changes since 0.8

Goal of this release was to make the application more robust and more professional. To achieve these goals we developed new features that are mandatory for such application and we fixed a large number of bugs. Just remember that some of the improvement depends on the new data model provided with release 0.9. So if you keep former one, you may have some bugs not fixed. We also underline the fact that the new data model is not compatible with the one you currently have. So we recommend you to check “Migration” chapter in *Administrator guide* to use the best practice to migrate.

## *New features*

Notifications:
This version introduces the capability to generate fully customizable eMail notifications.
This is achieved via two new type of objects: triggers and actions. Triggers define when a particular notification must be sent. Actions define the recipients of the notification as well as the content of the eMail message.
Have a look at the "Notifications" menu item (admins only) for how to configure the notifications.
Note that the notifications shipped by default with the application have been set to 'disabled' so that no
email get sent out in case you load the sample data that contains several tickets.
To enable them go to the "Admin" menu "Notifications", then in the tab "Actions" open the action
that you want to enable and modify its status to "production".

Documents:
The "document" object now contains a field to upload binary documents. The application automatically keeps track of the history of the document (i.e. each version is recorded in the database).
Such documents are stored as "blobs" in the database.
Some type of documents can be displayed online directly (images, HTML, PDF...) some others
can only be opened in a new window, or saved to the user's disk.

SOAP Web service:
This release introduces a formal SOAP web service to create an incident ticket.
The WSDL describing this web service is located at:
http://<your_server_and_port/webservices/itop.wsdl.php
Right now the web service has been tested using a PHP client and the Eclipse/Java web services tester.
We are planning to add more capabilities to the web service in the next releases.
Check the PHP client example available with this release in:
/webservices/itop.soap.examples.php

Truncated lists:
When the result of a query returns a long (limit is configurable) list of objects,

the display is truncated to speed up the whole display, with a link to open the full list.

### *Bug fixed*

All our bugs are track on sourceforge: http://sourceforge.net/apps/trac/itop/report/1. This current release is fixing 11 critical bugs:

#15 major enhancement Manage documents
#17 major enhancement User right management UI
#28 major defect Import CSV failing
#29 major defect Search in object details page
#31 major defect Wrong HTML display in export CGI
#38 major defect Content of Tabs not displayed on Reload
#42 major defect Issue with IE6 and IE7
#48 major defect Change tracking for user object class wrong
#52 major defect issue when displaying details for lnkInfraError object
#53 major defect Global search always displays organizations
#58 major defect issue with HTML format in export.php
#59 major defect Modification of an object with an external key fails
#60 major defect Modification of Service Calls does not work on IE
#65 major defect Incorrect handling of localized characters (like accented characters é à, etc.)
#67 major defect Misleading message when Flash is not installed
#43 minor defect Enter/Cancel keypress closes the dialog
#44 minor defect Mandatory field without option - various symptoms
#49 minor defect Grant matrix not reflecting changes in the user profile
#62 minor defect Could not create new object Person in a bulk load
#47 minor enhancement Split is deprecated.

## Current limitation

Release 0.9 is not supporting:

- Creation of new user profile.
- Delete All functionality for a list of object.
- Cloning an existing device. This feature has been disabled for the moment
- as it was not working properly.
- Update All for n/n relationships.
- A lifecycle is not defined for all CI. Only for incident tickets and change tickets.
- Localized characters (like accented letters) are not supported for the moment in eMail notifications

## Installing iTop

### *Software requirement*

iTop is based on the AMP (Apache / MySQL / PHP) platform and requires PHP 5.2 and MySQL 5.

Getting required software on Debian:

Apt-get install apache
Apt-get install mysql
Apt-get install php

Getting required software on Redhat:

Yum install apache
Yum install mysql
Yum install php

## *Download iTop package*

Latest version of iTop is release 0.9 You can download it on source forge:

wget http://sourceforge.net/projects/itop/files/itop/0.9/iTop-V0.9.zip/download

You can also browse source forge web site to view all release:

http://sourceforge.net/projects/itop/files/

## *Install iTop*

1. Make sure that you have a properly configured instance of Apache/PHP running
2. Unpack the files contained in the zipped package in a directory served by your web server.
3. Point your web browser to the URL corresponding to the directory were the files have been unpackaged and follow the indications on the screen.

   For instance http://myserver, or http://myserver/itop/ if you have created a dedicated alias for iTop application

As a matter of fact, iTop package provides a step by step wizard to install the application.

First step is checking all prerequisites for MySQL and PHP, and lets you enter information to access the MySQL database (server, user and password). MySQL user needs to have root privileges.
The data base can be installed either on the same server or can be a remote host if you prefer to have a two tier architecture, or reuse an already installed instance of MySQL.

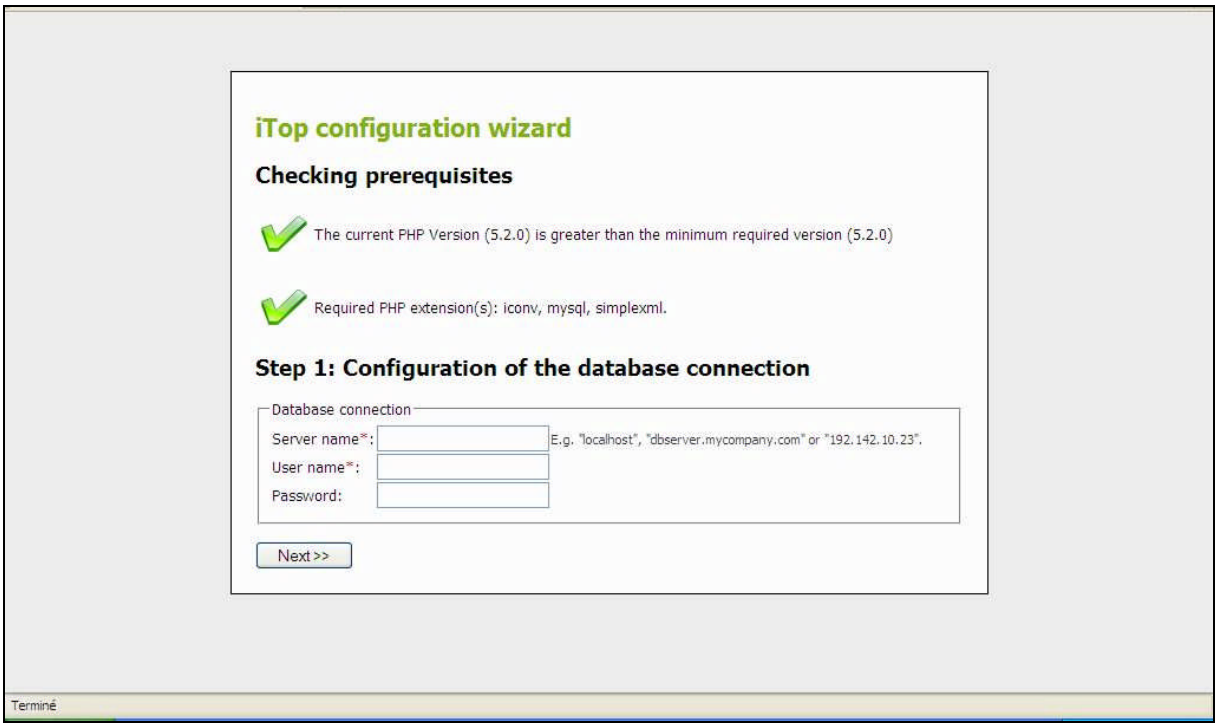


Figure 1

Second step lets you create the database for iTop. You can either choose an existing one, or create a new one.
You can also decide to prefix all iTop tables with a given name. This is useful when you want to run several instances of iTop with the same data base.

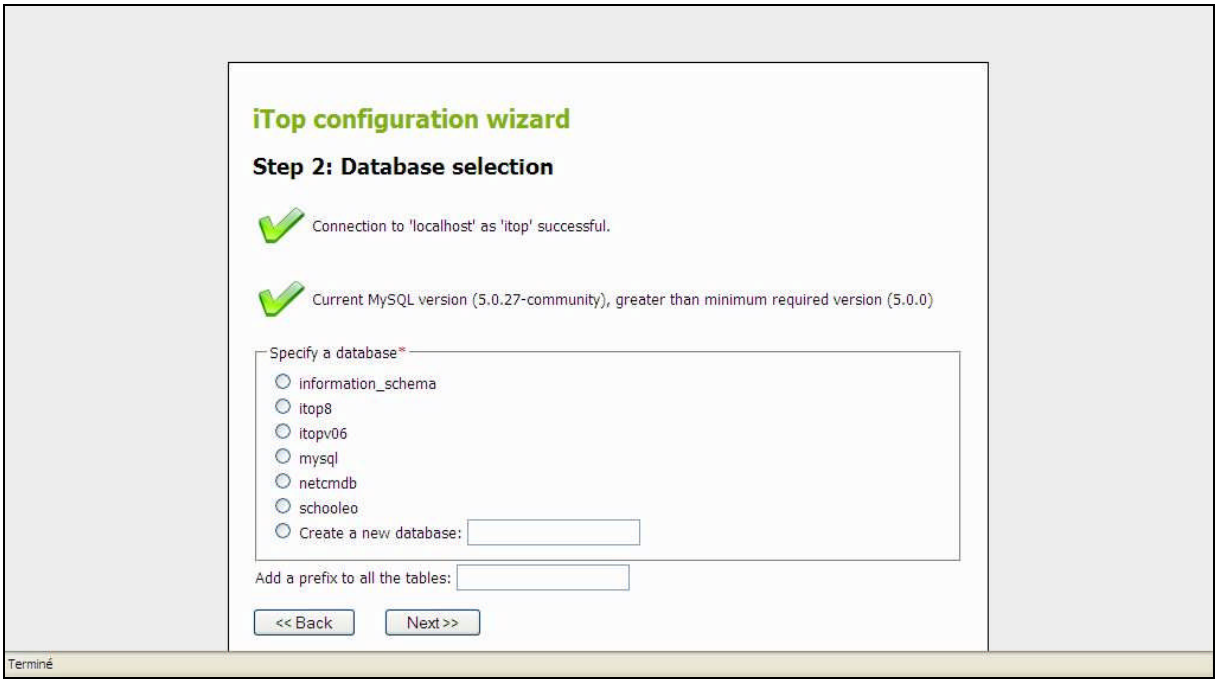


Figure 2

Third step lets you define administrator login for accessing the application. Don't forget user login and password, as they are required to access the application.

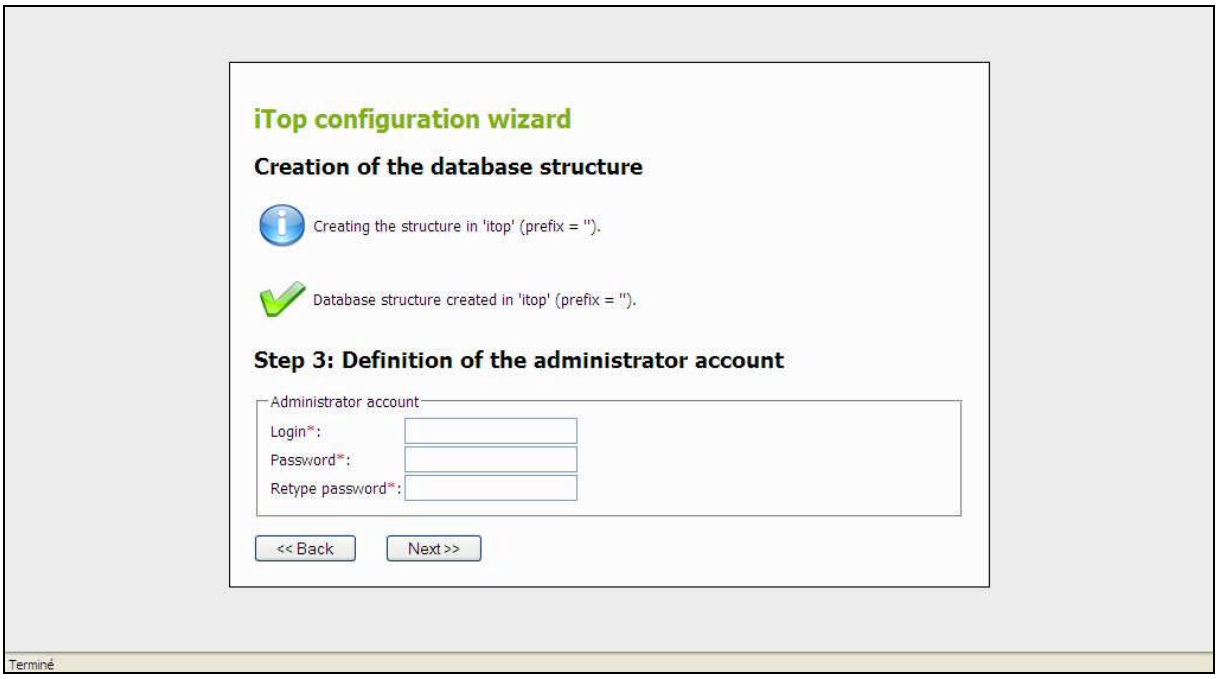


Figure 3

Forth step lets you decide if you want to create sample data for testing purposes. This is very useful first time you install iTop. If you select "No", database will be empty and you will have to load data by yourself.

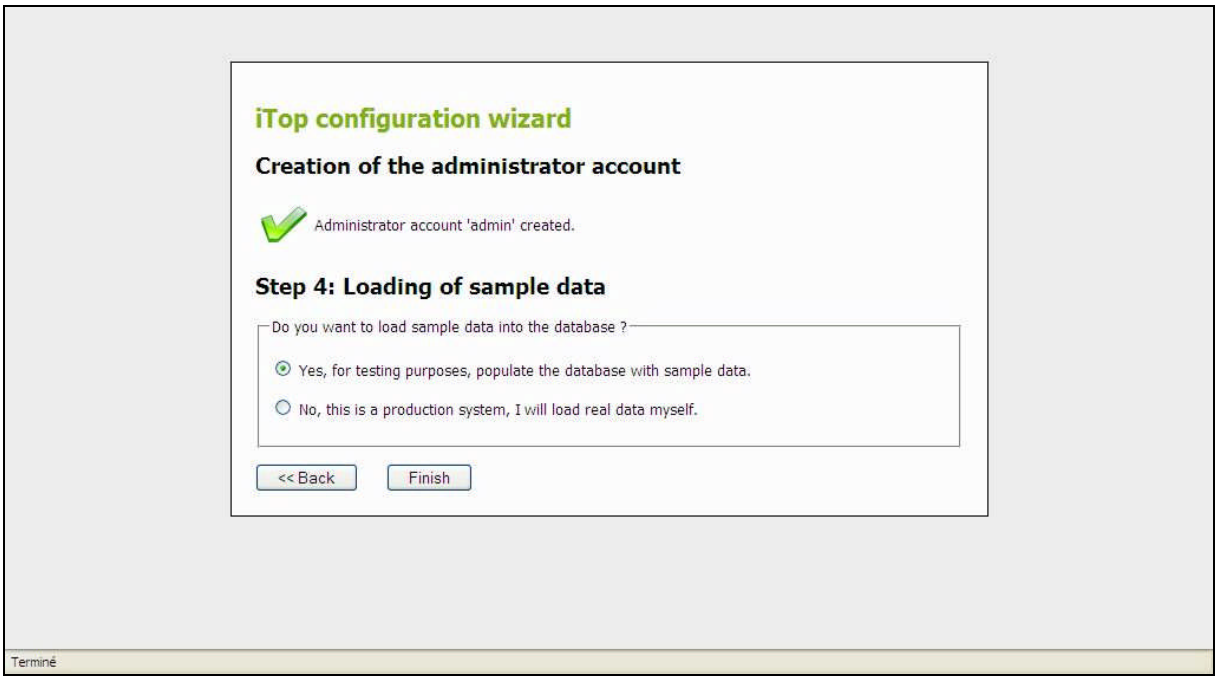


Figure 4

Congratulation, installation is successful and you just have to play with iTop now !

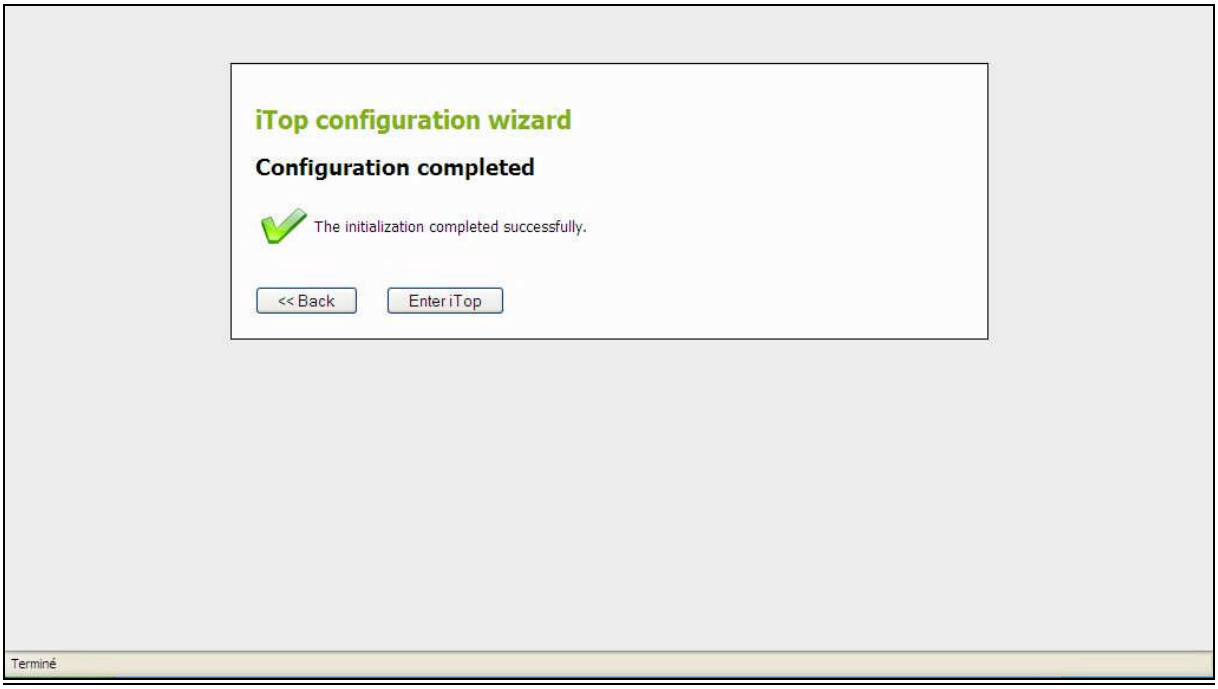


Figure 5

### *Changing configuration option*

#### Configuring short list display

Short lists are used to limit number of item displayed in a list when it is too long. By default a short list is displayed as soon as there are more than 15 objects. This value can be changed by modifying "**max_display_limit**" in config-itop.php.
The number of object displayed in a short list is defined by another variable in config-itop.php "**min_display_limit**". Be careful to not set a too high value.

#### Configuring size of document upload

The maximum size of document you can upload is limited by "**upload_max_filesize**" in php.ini and "**max_allowed_packet**" in mysql.conf. This latest value has to be a little bit biger than **upload_max_filesize**. During installation, setup script checks both variables and raise warning in case there is an issue.
If you want to change the maximum size of document you have to modify both and make sure they are coherent.
Once done you have to restart your web server and mysql.

## Migrating from previous version 0.8

The release 0.9 data model is not compatible with former one. So you may encounter inconsistency issue between this one and your current database.
In order to migrate, you have two options:

- Either you keep your current data model and so won't get benefits from new one.
- Or you export your current data in csv files, in order to re-import them later in your new installation of release 0.9

### *Keeping 0.8 data model.*

If you choose this option, just unpack from tar installation all directories except "business" at the root of your previous installation.

### *Exporting & re-importing data*

If you choose this option, you have to use export function for each type of objects, in order to save your data in csv files. Once done, you can install new release 0.8 using a new database. Once done, you can re-import you object using "csv import" functionality. Be careful, you need to make sure that attributes for your objects are still valid, and you need also to check pre defined values are still the same for enumerated list. For that compare former data model with new one for each type of object. For this, you should look at "viewing data model" chapter in this documentation.
In case you encounter issues, you can ask support at support@combodo.com

## iTop common usage

### *Starting iTop*

To use iTop, you just need a simple web browser and enter the following URL:
http://yourserver or http://yourserver/<itop alias> if you have created a particular apache alias for the application.

User is prompt to enter his login and password.


Figure 6

Depending on its profile, the user has more or right to use the application, but this topic will be discussed later in "User Management" chapter.
Once authenticated, the user accesses the main iTop page.

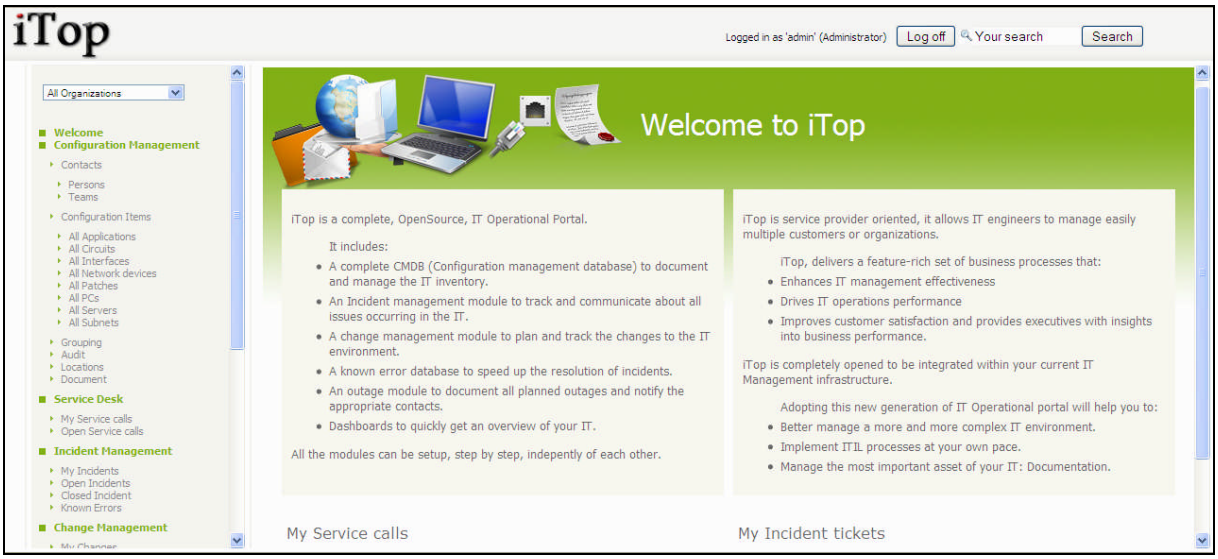


Figure 7

This main page is divided in three parts:

- Left menu (also called explorer menu) to access item from each module (CMDB, Incidents, Changes, Services and contracts)
- Main frame on the right displays list of items from selected module, or details for a given item.
- Top frame to use global search function, and display login information

# Managing users

ITop provides a user management module allowing you to assign users with one or several predefined profiles. Thus you can restrict access to you operational portal, and allow user to modify only objects they are allowed to. You can also define action they are allowed to perform. For instance, a change approver is not allowed to create a change, but just approves it.

In the current version, profiles are predefined, so their modification requires assistance of an iTop consultant.

## *Viewing Profiles*

Under “Admin Tools” menu you can use profile sub-menu to access those profiles, and see corresponding responsibilities. Following window appears:

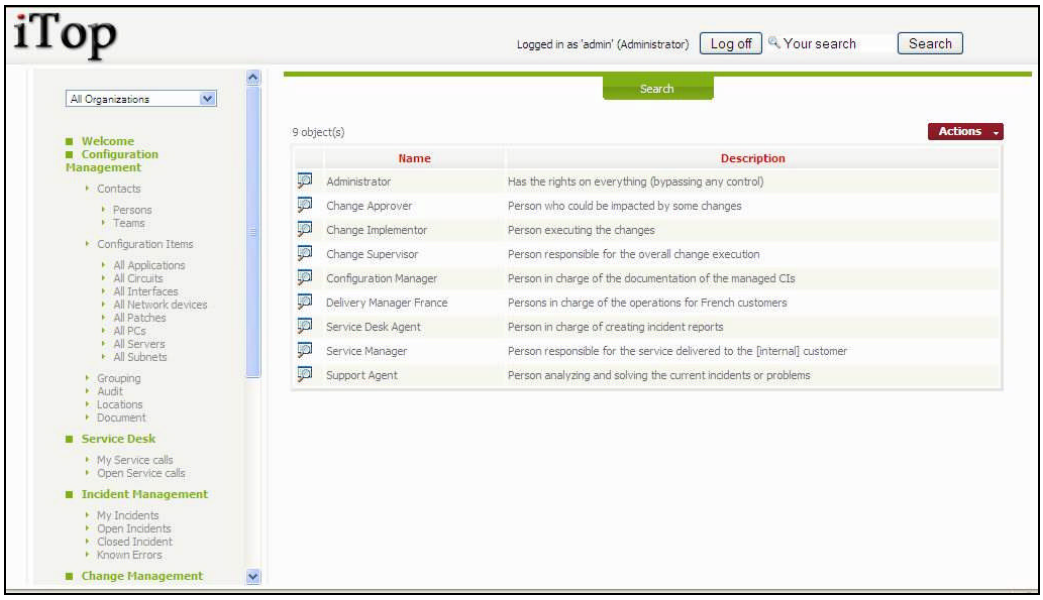


Figure 8

When you click on  button you get details for selected profile.

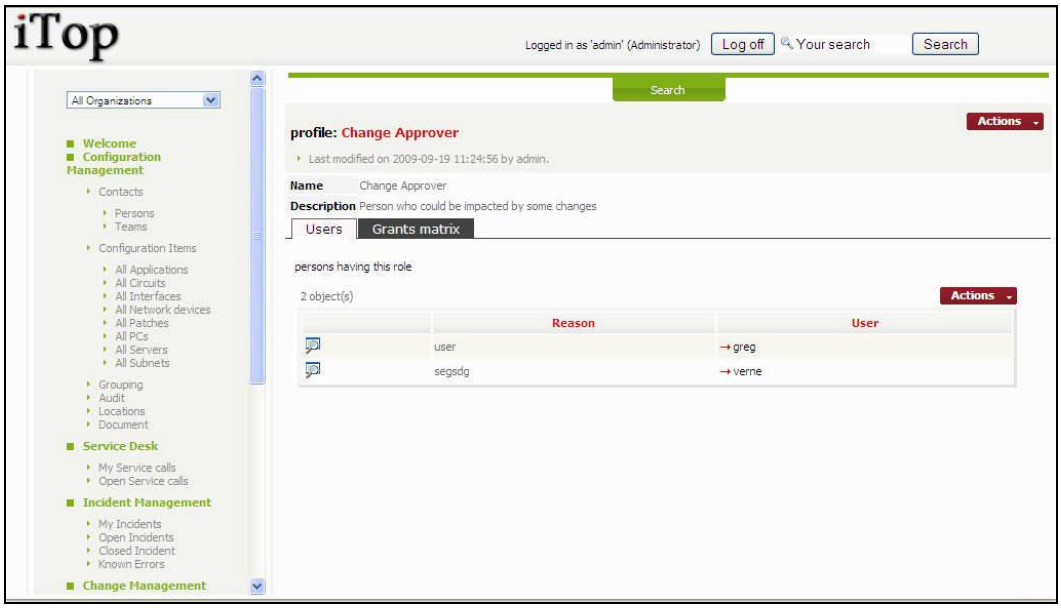


Figure 9

The tab “Users” list all users having this profile.
The tab “Grant matrix” displays all objects and actions allowed for this profile.

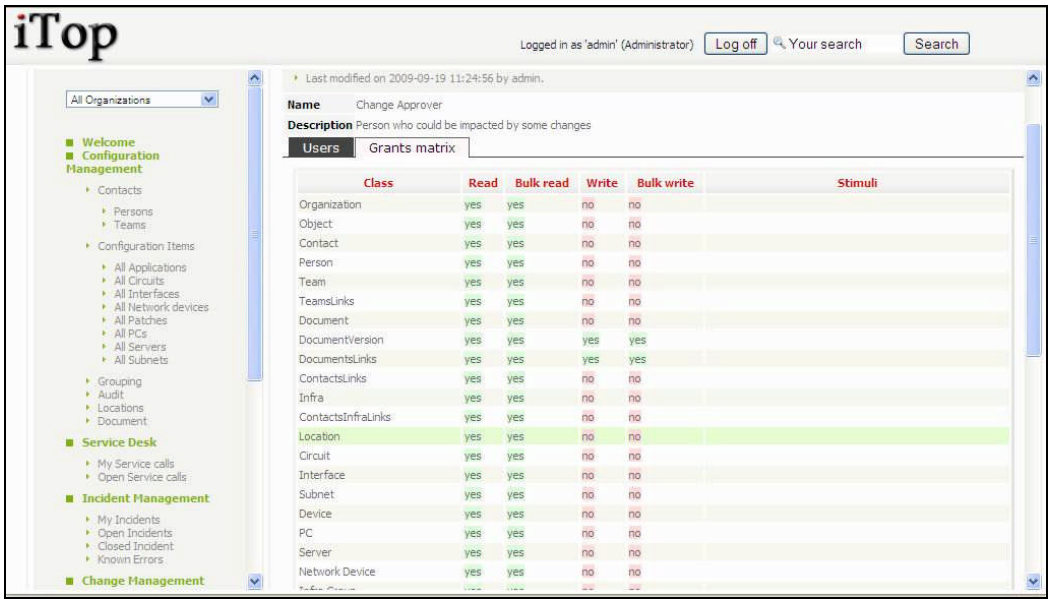


Figure 10

## *Viewing users*

The menu “User logins” under “Admin Tools” one, allows you to see all logins defined for you iTop instance.

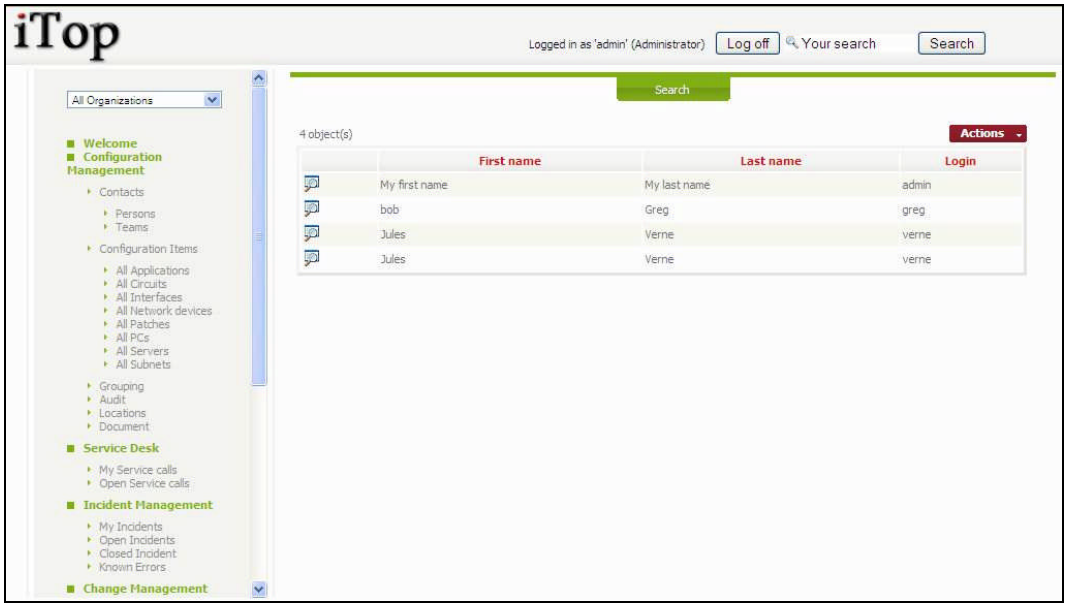


Figure 11

When you click on  button you get details for selected login.

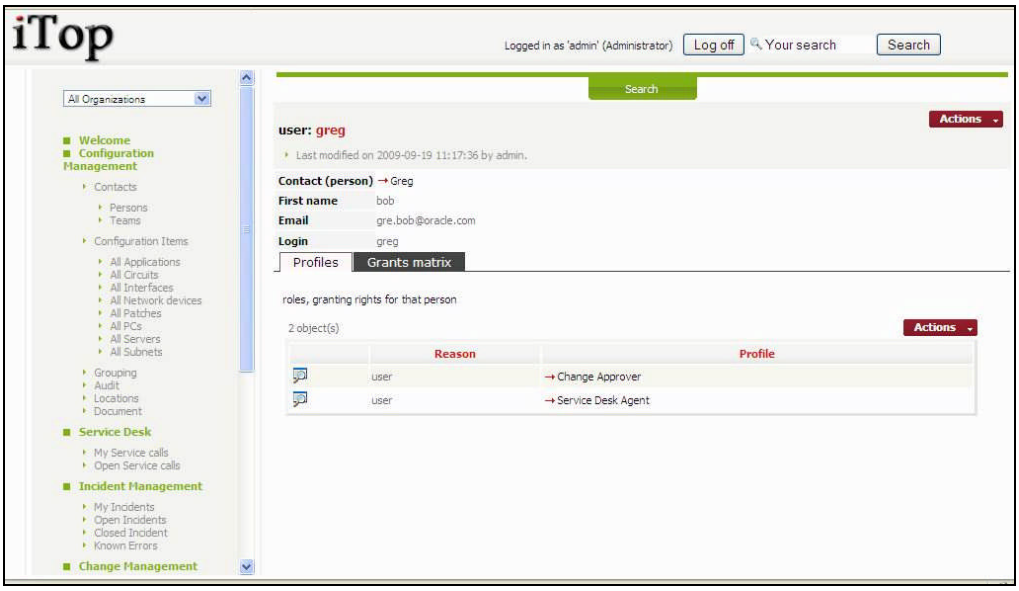


Figure 12

A user login is always linked to a contact stored in the CMDB (See Using CMDB module in iTop user guide). Prior to create a login you have to make sure that the user is documented as a contact in the CMDB.

The tab “Profiles” list all profiles that are linked to this user.
The tab “Grants matrix” display rights allowed for this user. It is the merge of all rights corresponding to associated profiles.

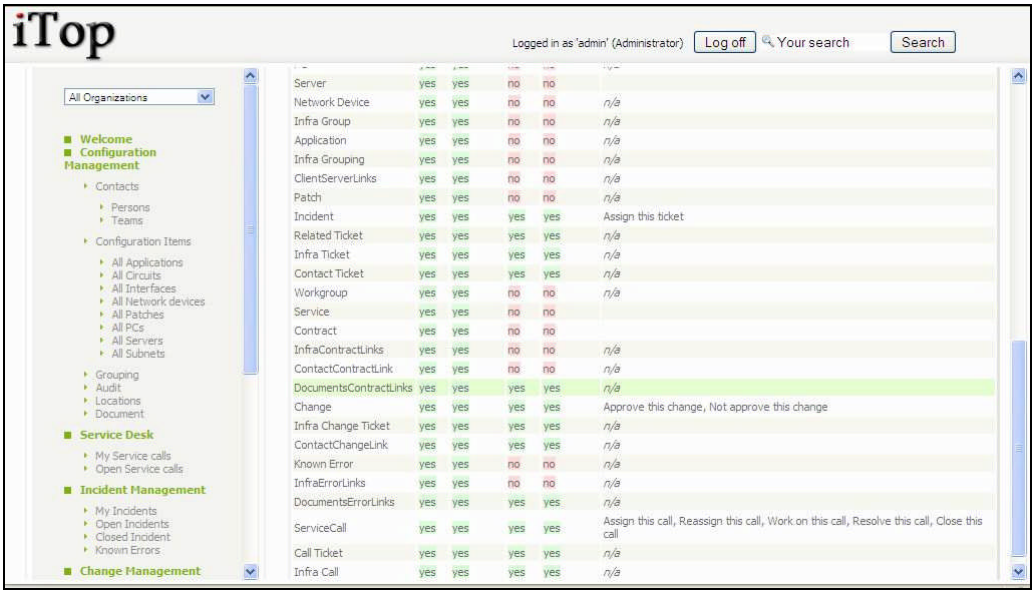


Figure 13

## *Creating a user*

To create a new user you just have to click on “New” in action drop down list, from either user list or a given user detail. Following wizard then appears:

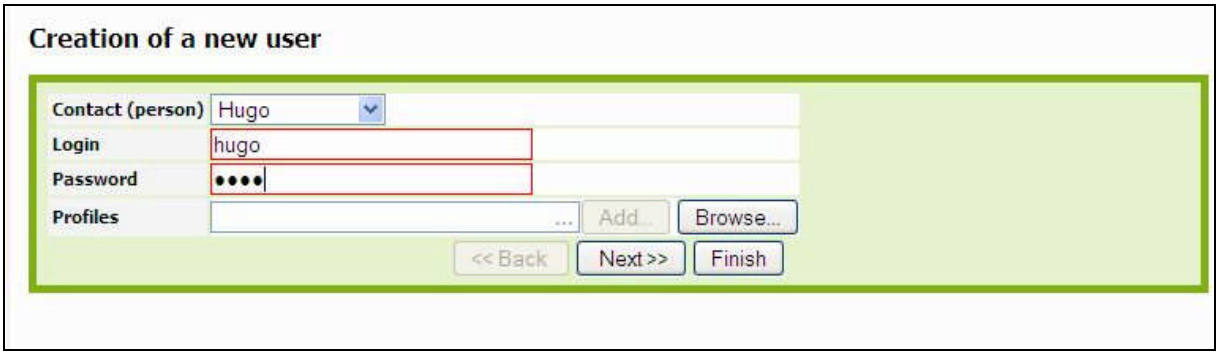


Figure 14

To add profiles to this user you can either fill the profiles field if you know the profile and click on Add, or click on button Browse... . In the second case, you will use following wizard to select profiles you want to assign to user

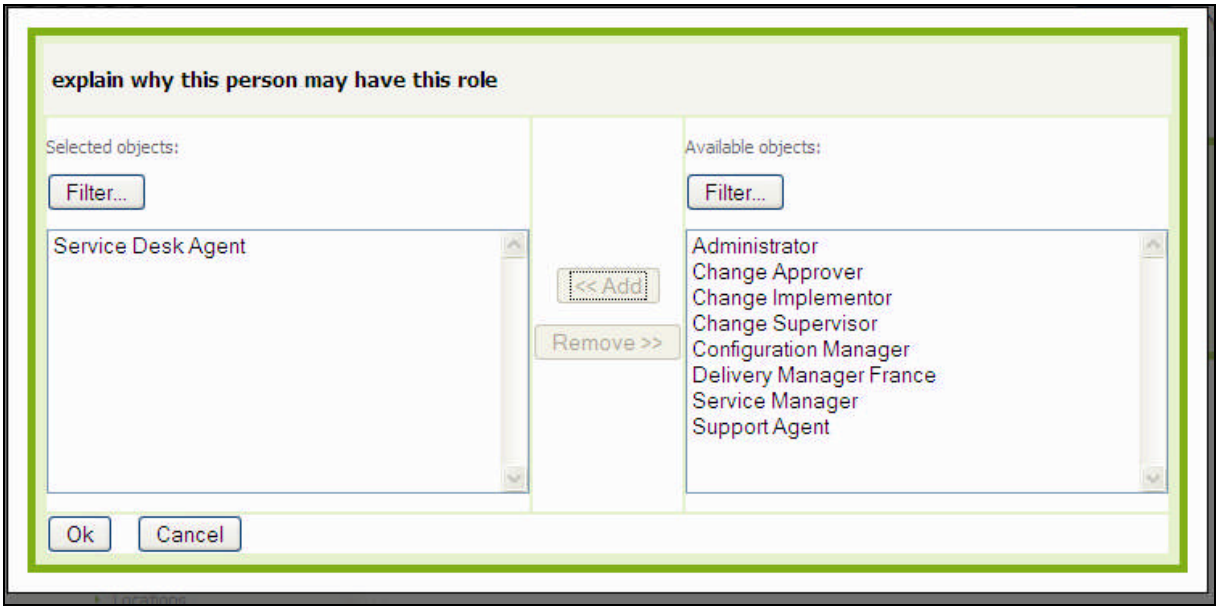


Figure 15

Once profiles are added to the user, click on Next >> . A confirmation window appears. Click on Create user to validate creation of this new user.

### *Updating user profile*

You can add or remove permissions to a user by managing profiles he is linked to. Use Actions button on top right corner of a list of profiles assigned to a user. Use “Add” to add a new profile, or “Manage” to modify or remove one.
When you click on “Manage”, following wizard appear:

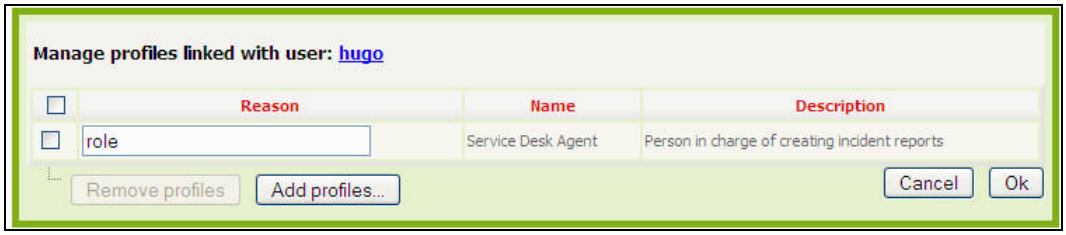


Figure 16

You can change the reason why the user has this profile, or Remove this profile. Be careful, make sure the user has at least one profile.

If you click on “Add profiles”, following wizard appears. It is the same has the one you get when you click on “Add” in Actions button list.

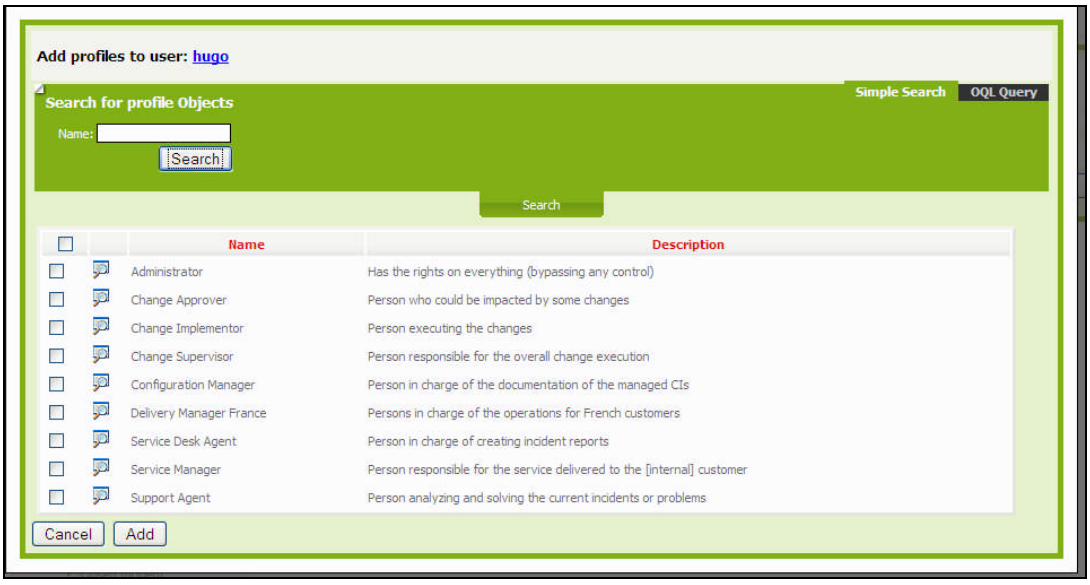


Figure 17

Use the Search button to look for profiles, select the ones you want to assign to user, and click on Add. Profiles are then assigned to user.

## Managing Organization

Organizations are used in iTop to group object into silos. Only administrators can add or remove organizations.

## *Adding an organization*

To add an organization, you have to click on "*Universal search*" menu. It displays the list of existing organization.

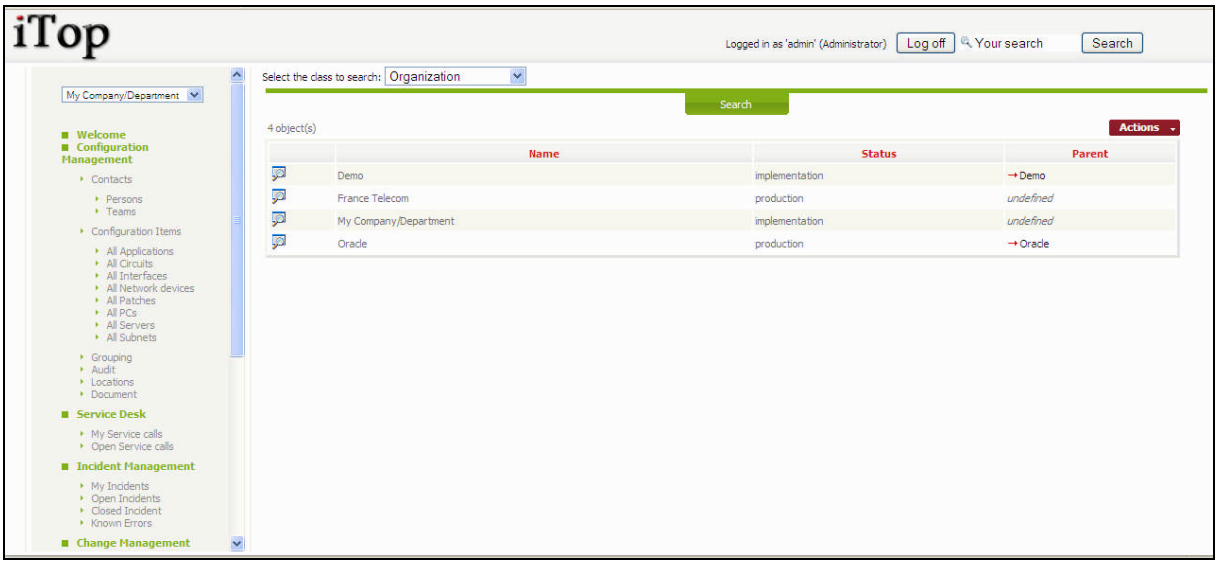


Figure 18

Then click on  and select *New*. You just have then to fill following form

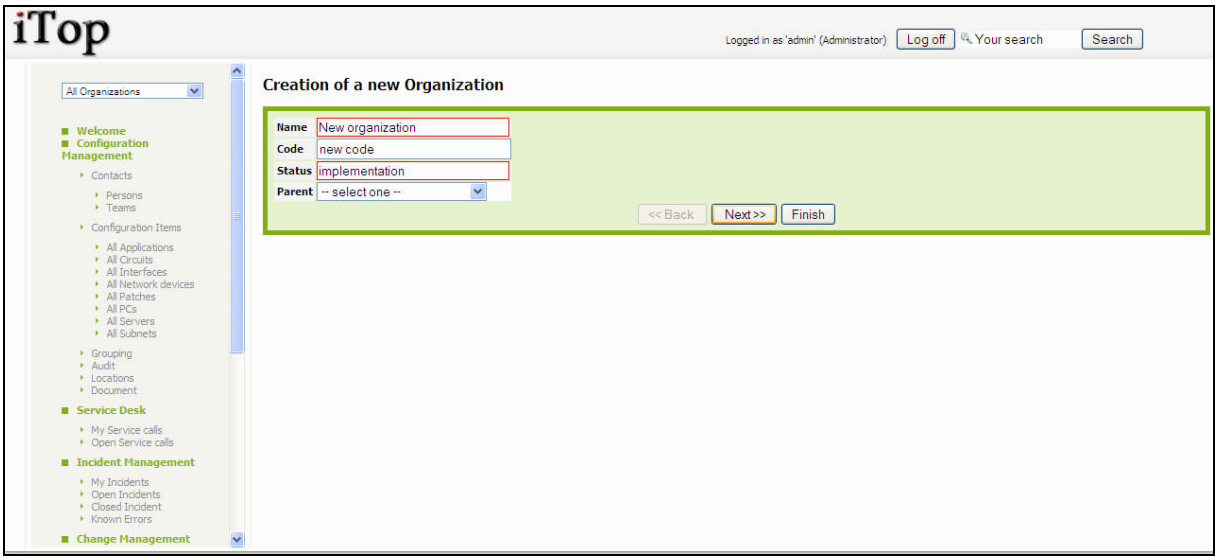


Figure 19

## *Updating an organization*

To add an organization, you have to click on "*Universal search*" menu. It displays the list of existing organization.

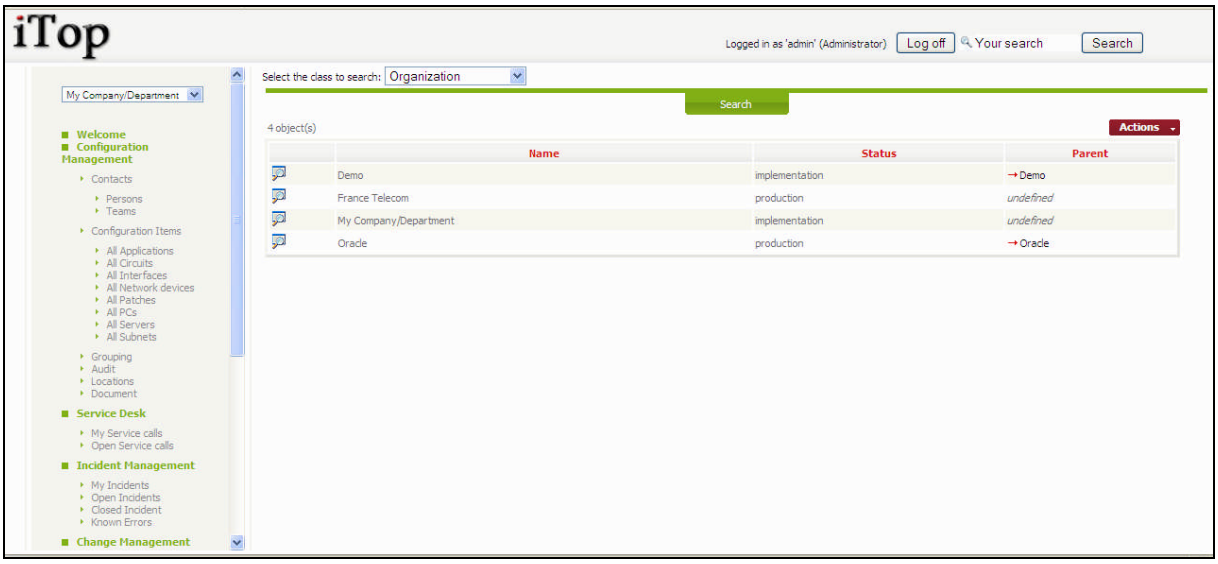


Figure 20

Click on  to see details for selected organization. You can then click on  and *Modify* to change values for organization's attributes.

## Managing Notification

In this new release of iTop, a notification system is integrated with life cycle of any object if exist. This allows you to define e-mail notification rules when a given class of object enter or leave a given state, or when we create a new object.
The notification mechanism is divided in two parts:

- Triggers that define when mail notification is executed and for which type of object
- Action that define how the mail is formatted

You can like several actions to a given trigger. The same action can be linked to several trigger.

The menu "Notification" displays following window:

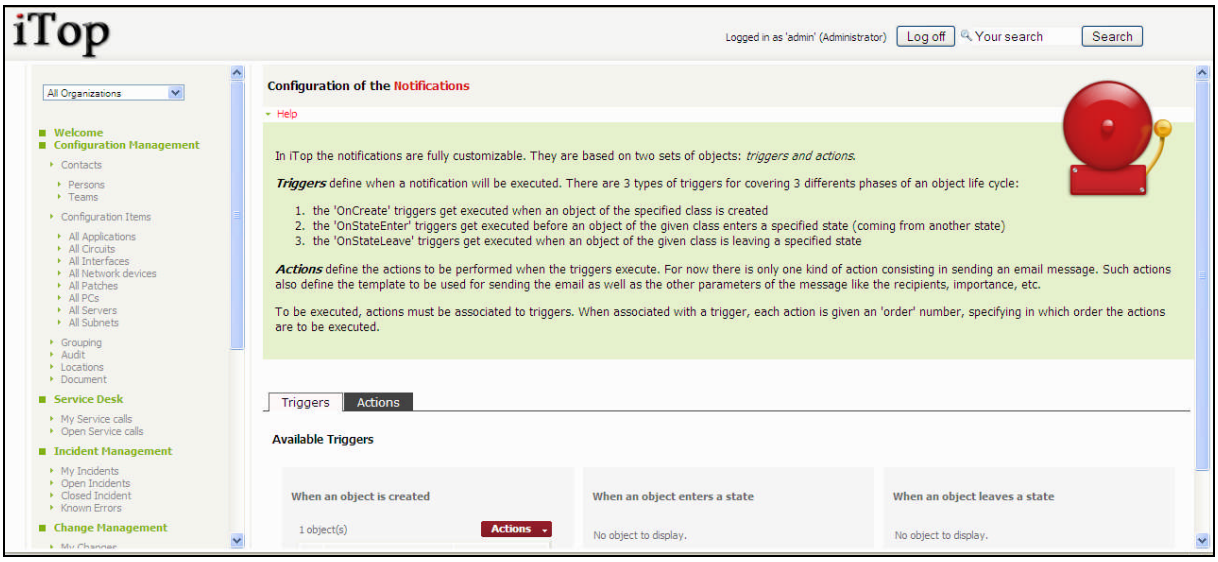


Figure 21

The “triggers” tab displays all created triggers, and the “Actions” tab displays all Actions

## *Creating an action*

Before creating a trigger, you need to define at least one action. It is a kind of template for formatting e-mail to be sent.
To create a new action, go to action tab and click on “New” in action drop down list. The following wizard appears:

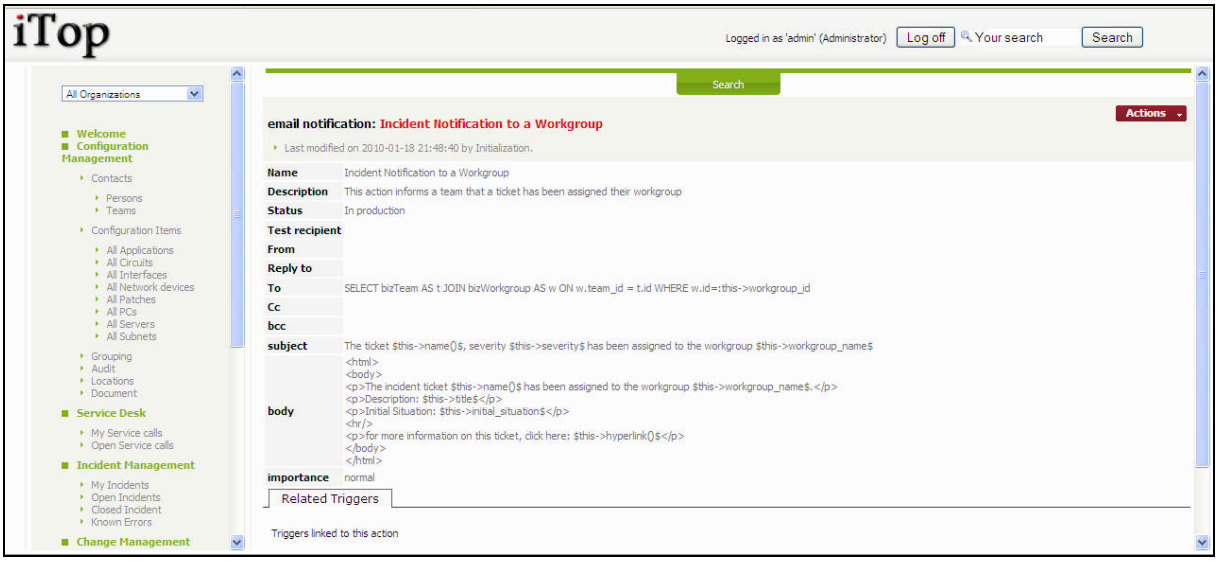


Figure 22

You have to define at least a from e-mail address, and define to whom you want to send mail. The from e-mail address has to be a valid one, else your smtp server will refuse it.

In To", "Cc", and "Bcc" field you can use OQL query to define a list of target e-mail. This list as to return a list of object containing an e-mail attribute:

- Contact
- Person
- Team

For instance To: SELECT bizPerson WHERE name LIKE 'John'
If the return list is empty no mail is sent.

The subject field is as well mandatory.

The body is the text sent. It can use HTML tag for formatting. You can also use attributes of the object that will trigger the action. The syntax to be used is $this->attribute$.
There is as well to specific attributes:

$this->name()$ is the name of the concern object
$this->hyperlink()$ is a url to access the concern object

By Default importance of the mail is "normal".

The 0.9 release provides 3 actions, but you have to update from field with a valid e-mail address.

To test a new action, you can use the status "Being tested" and "Test recipient" with a test address. In that notification will be sent to this later address. Once validated don't forget to change the status to "In Production".
If you want to de-activate an action, just set the status to "Inactive".

## *Creating a trigger*

Once you have actions defined, you can create triggers. You can define three types of triggers:

- When a new object is created
- When an object enter in a given state
- When an object leave a given state

To create a new trigger, click on "New" in action drop down list for the given category in "Trigger" tab. The following wizard open:

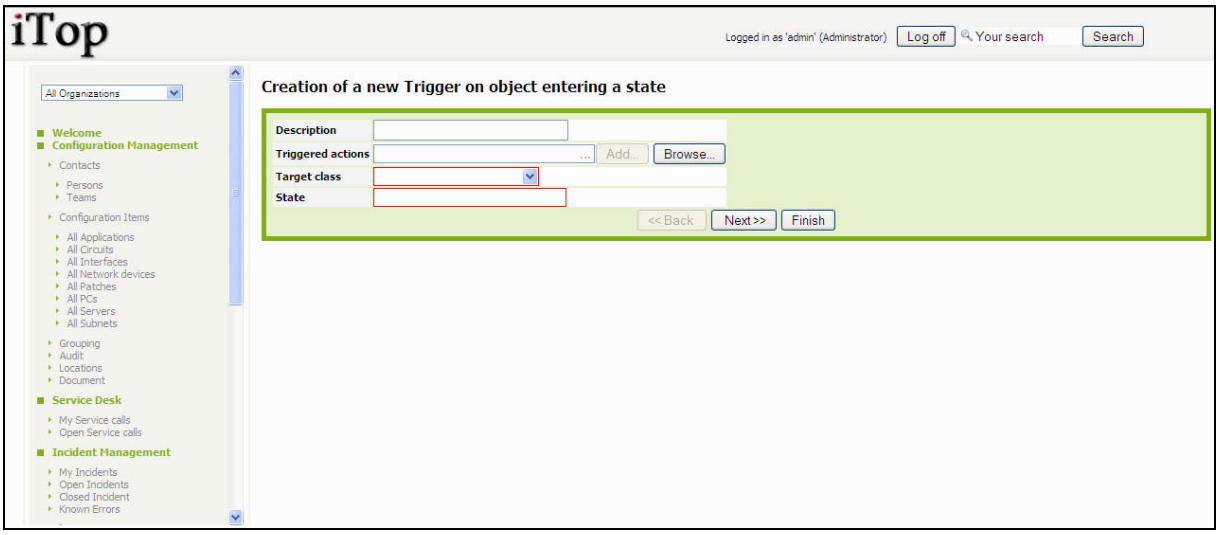


Figure 23

For each trigger you have to define the class of object to which this trigger is applicable and the concern state.

Then you have to select associated actions using “browse” button.

We strongly encourage you to test triggers and actions before moving them to production. As a matter of fact, it is always difficult to understand why e-mails are not sent. You can use menu “Application log” where all notifications are track to check if a mail had been triggered. Details of each log event describe what happen with a given notification. So you can easily troubleshoot in case it is failing

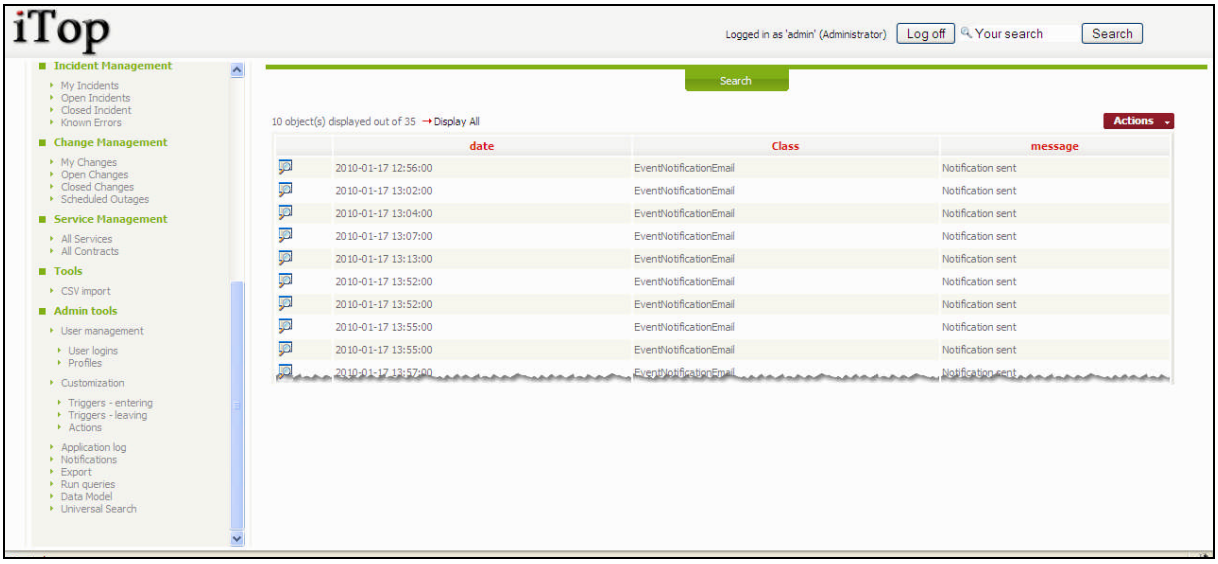


Figure 24

If you are running iTop on Linux server, you need to make sure that php.ini file contain following line:

***sendmail_path = "/usr/sbin/sendmail -t -i"***

If you are running iTop on Windows server, you need to make sure that php.ini file contain following line:

***SMTP = <smtp server>***
***smtp_port = 25***

In order to test mail notification we create page http://<itop server location>/setup/email.test.php it allows you to test mail sending and check prerequisites.

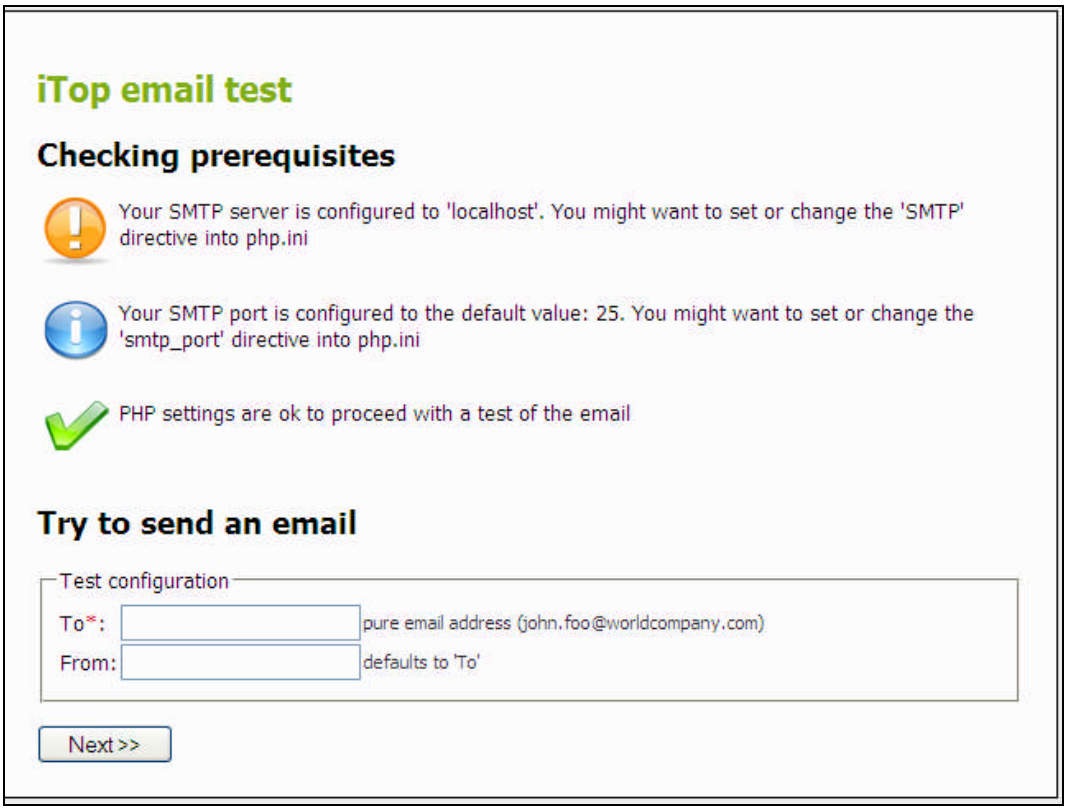


Figure 25

## Viewing data model

You can view current data model used by iTop application by clicking on menu “Data Model”. Following tree explorer allows you to navigate through each class of object.

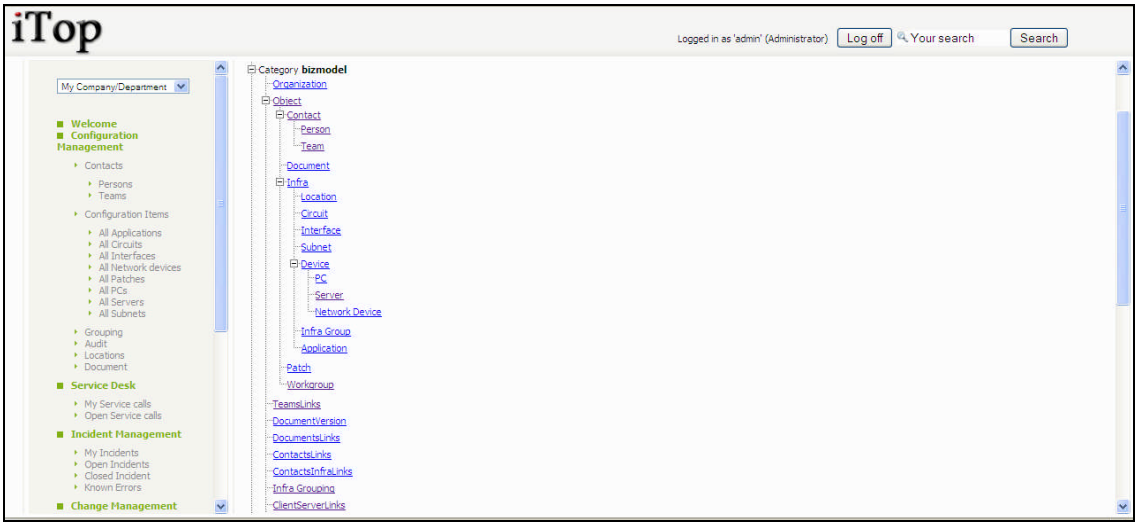


Figure 26

When you click on object link, you get details for a given class.

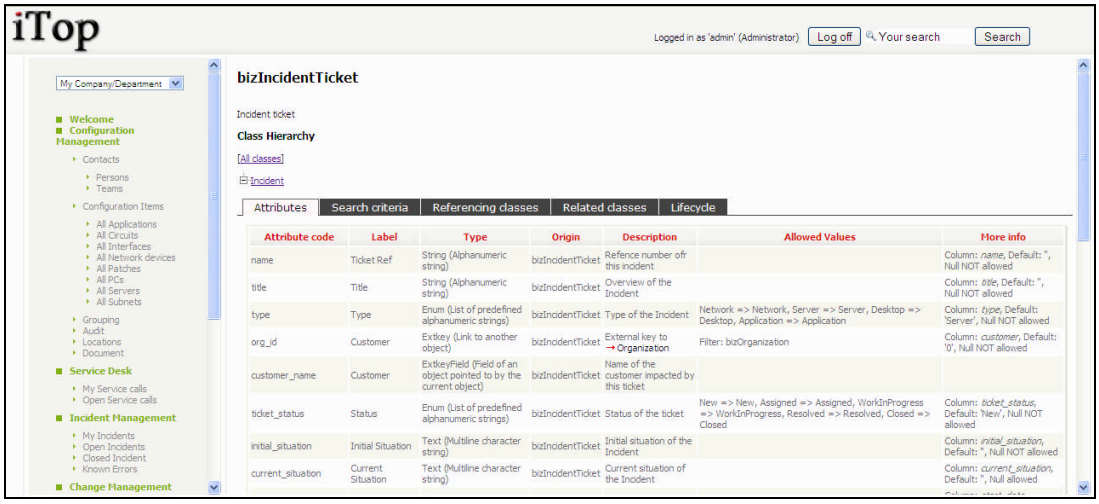


Figure 27

“Attributes” tab displays all attributes for this class.
“Search criteria” tab displays all attributes you can use in search engine.
“Referencing classes” tab displays classes having a reference to current one.
“Related classes” tab displays classes related to this one via external key.
“Lifecycle” tab displays lifecycle workflow graph and information.

## Running Object queries

The menu “run queries” allows you to test OQL queries (See OQL reference guide).
It includes as well some predefined queries to be used as examples.

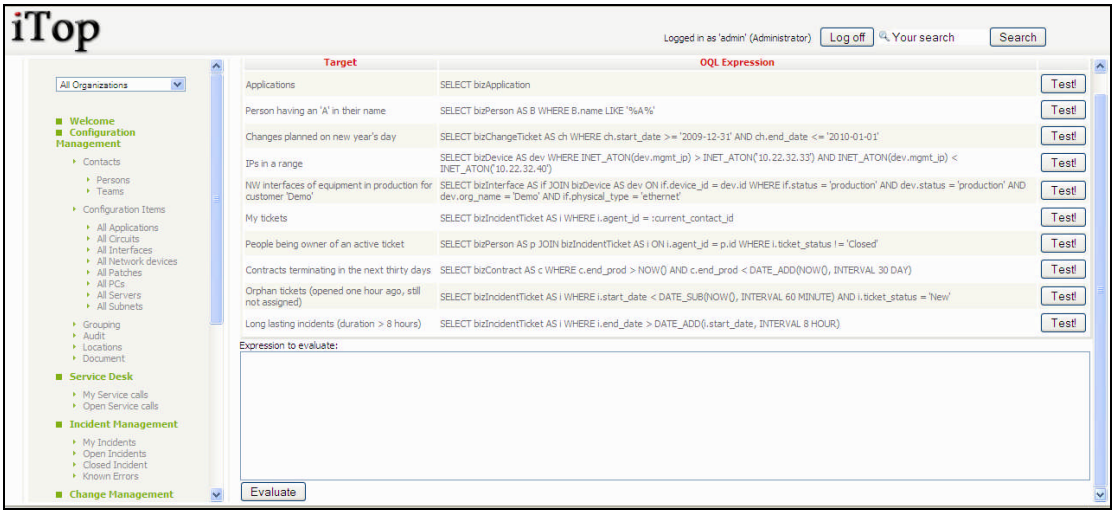


Figure 28

## Managing Audit

In the current version Audits are managed directly in the database, so it is recommended to ask an iTop consultant to configure them on your behalf.
Rules are stored in ***priv_auditrule*** and ***priv_auditcategory*** tables.
The table ***priv_auditcategory*** defines rule categories. A rule category defines list of objects that are concerned by associated rules. For instance all devices that are on production.
The table ***priv_auditrule*** defines the rule that need to be check for a given category. For instance “We don’t want to have devices on production located on a Site in implementation”.

You need to make sure that for a given audit category, rules applies for a same class of object. For instance, you cannot have an audit category applicable for devices, that check rules on sites.

## Managing Dashboard

Dashboards are defined as web page stored in the iTop database. In version 0.8 there is no UI to edit them. So for adding new graphics you have to edit manually databse.
They are linked to menu definition which is stored in table *priv_menunode* . Only 4 menus are linked to dashboard:

- Configuration Management
- Incident Management
- Change Management
- Service Management

Thus only those menus can be modified, else you may break behavior of iTop application.

Dashboards are in fact html tables containing *itopblocks*. So if you need to add new graphics you just have to add a new cell in the table containing an *itopblock*.

An itopblock is the combination of an OQL query, a grouping criteria and a type of graphic. There are 3 types of itopblock:

- Bar chart
- Pie chart
- Display list

Syntax for an itopblock:

<itopblock BlockClass="DisplayBlock" objectclass="*class of object*" type="type of graphics" parameters="parameters for graphic" asynchronous="false" encoding="text/oql">OQL query</itopblock>

Class of object corresponds to type of object your are interested in data model (bizIncidentTicket, bizServer …)

Type of graphics corresponds to the way you want to display results: *count* for table or *open_flash_chart* for graphics.

Parameters for graphic correspond to information for defining a graph:

- chart_type:pie;group_by:<*object attribute to use for group by*>;chart_title:<*Title*> for pie chart
- chart_type:bars;group_by:<*object attribute to use for group by*>;chart_title:<Title> for bar chart
- group_by: *:*<*object attribute to use for group by*> for tables

OQL is the query that list of object we would like to include in this dashboard. See OQL reference guide for more details

Following is an example of menu definition for “Incident Management” menu:

```
<style>
.dashboard {
vertical-align:top;
width:50%;
border:1px solid #000;
-moz-border-radius:10px;
padding:5px;
text-align:center;
}
</style>
<p style="text-align:left; font-family:Verdana, Arial, sans-serif; font-size:24px;">Incidents Overview</p>
<table border="0" padding="5">
<tr>
<td class="dashboard">
<itopblock BlockClass="DisplayBlock" objectclass="bizIncidentTicket" type="open_flash_chart"
parameters="chart_type:pie;group_by:type;chart_title:Incidents by Type" asynchronous="false"
encoding="text/oql">SELECT bizIncidentTicket</itopblock>
</td>
```

```
<td class="dashboard">
<itopblock BlockClass="DisplayBlock" objectclass="bizIncidentTicket" type="open_flash_chart"
parameters="chart_type:bars;group_by:ticket_status;chart_title:Incidents by status" asynchronous="false"
encoding="text/oql">SELECT bizIncidentTicket</itopblock>
</td>
</tr><tr>
<td class="dashboard">
<p style="text-align:left; font-family:Verdana, Arial, sans-serif; font-size:16px;">Incidents by Workgroup</p>
<itopblock BlockClass="DisplayBlock" objectclass="bizIncidentTicket" type="count"
parameters="group_by:workgroup_name" asynchronous="false"
encoding="text/sibusql">bizIncidentTicket</itopblock>
</td>
<td class="dashboard">
<p style="text-align:left; font-family:Verdana, Arial, sans-serif; font-size:16px;">Incidents not yet assigned</p>
<itopblock BlockClass="DisplayBlock" objectclass="bizIncidentTicket" type="list"
parameters="dashboard:true" asynchronous="false" encoding="text/sibusql">bizIncidentTicket: ticket_status =
'New'</itopblock>
</td>
</tr>
</table>
```

# Managing DB backup

All iTop data are stored in MySql database. So we recommend you to set up backup policy for your database.
You can use for instance phpMyAdmin to do so.
We recommend you to do it frequently in order to not loose data modified by iTop users.

# Integrating with other application

## *How to export data out of iTop*

A set of objects can be exported by the mean of a web service (could be scripted)
Simply call /pages/export.php?format=xml&expression=OQL
(format=csv is also available)

Using wget, this would give the following command line:
wget --header="Content-Type:application/x-www-form-urlencoded" --post-file=./login.txt -O "export.txt" http://<server>/webservices/export.php?format=csv&expression=...

Option –O return result in file export.txt

Format for file login.txt should be:

operation=login&auth_user=<your user>&auth_pwd=<your password>&foo=1

The set of objects to be exported is defined in an OQL query.
OQL stands for Object Query Language. The OQL syntax is very close to the SQL.
The main differences between SQL and OQL are:

* No FROM clause: an OQL query always return a set of objects of a given class and the user will never specify the expected columns, because the OQL interpreter retreives this information from the Data Model.

* JOINS: simply specify "JOIN" and the interpreter will determine for you if an INNER JOIN or an OUTER JOIN should be performed, based on the definitions of the Data Model.

OQL Examples:

Get all the contacts
SELECT bizContact

Get all the persons (note that a person is contact also, but it has more attributes to be exported: first_name and employee_number)

SELECT bizPerson

Get the WAN circuits provided by "Foo Telecom"

SELECT bizCircuit JOIN bizOrganization ON bizCircuit.provider_id = bizOrganization.id
WHERE bizOrganization.name = 'Foo Telecom'

Get the WAN circuits providers

SELECT bizOrganization JOIN bizCircuit
ON bizCircuit.provider_id = bizOrganization.id

(In this example we have just inverted bizCircuit and bizOrganization ; yes the order matters, the first class specified is the expected class)

## *How to import data in iTop*

A web service allows you to write a script to enter new data, or refresh existing data. This can be helpful for the initial load or to schedule a daily synchronization of the data coming from an external data source - could be another application, an automated data collector, etc.

/webservices/import.php?class=bizOrganization&csvdata=<multine-csv>[&separator=<char>]

Note that this service emulates the functionality provided by the interactive bulk load: /pages/import.php

csvdata must be posted, the first line will contain the codes of the attributes to load, the first column is always used as the reconciliation key
- should be unique, as it determines if the object needs to be updated or created)
If not specified, the separator defaults to ';'

The answer is given in a simple html format, explaining what has been done for each row of data.

Example:
A script that creates a company called "Food and Drug Administration" (code FDA).

wget --header="Content-Type:application/x-www-form-urlencoded" --post-file=data.txt http://<yourserver:port>/webservices/import.php?class=bizOrganization

with: data.txt containing the following text

auth_user=<username>&auth_pwd=<pwd>&operation=login&csvdata=name;code
Food and Drug Administration;FDA
Combodo;CBD