



IT Service Center Administration Guide

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Other versions of this documentation

This document is for Version 1.6.0.

To view all versions of the IT Service Center Administration and User Guides, see [IT Service Center Documentation](#).

IT Service Center overview

With the IT Service Center, you can streamline IT support operations by consolidating IT ticketing and tasks into a single location.

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** editions

IT Service Center is available as an add-on license.

Manage cases and take action

IT Agents can resolve support tickets more quickly by deploying common actions without leaving the IT Service Center. These actions include:

- Reviewing performance events
- Terminating processes
- Starting or stopping system services
- Restarting the computer
- Installing, updating, or removing software

For example, if a user opens a support ticket that requires a software update, the IT Agent can deploy the update to the user's asset with a few clicks directly from IT Service Center. They can also create a deployment that pushes the same software update to other assets, reducing the possibility of duplicate tickets being opened by other users for the same issue.

Tanium as a Service

The ability to take actions on end user computers is enabled by a connection from IT Service Center with Tanium as a Service (TaaS).

The Tanium platform provides visibility and control of your endpoints. In Tanium, an endpoint is any computer or server on which you can install and run the Tanium Client service. In response to your standard or ad-hoc queries, Tanium can discover and report within seconds both static and dynamic real-time data pertaining to the endpoint. In addition to getting data about your endpoints, you can deploy actions to manage and secure your environment.

The operations in the IT Service Center are run by API calls to TaaS, which includes the Tanium™ Discover, Tanium™ Deploy, and Tanium™ Performance modules. Data about Tanium endpoints is stored in Salesforce as Asset objects. To see information about Tanium-managed endpoints in Salesforce, you can view them as Assets.

Configure Tanium for IT Service Center

Details about your initial admin user for Tanium as a Service (TaaS) are included in a welcome email. To use IT Service Center, configure an identity provider for your TaaS instance, assign user permissions to IT agents, and install the Tanium Client on the computers that you want to manage.

Prerequisites

- TaaS URL and login information that you received when you purchased IT Service Center
- List of IT agent user email addresses

Configure an identity provider

You must set up a SAML 2.0 compliant identity provider with your TaaS instance.

More information

[Tanium as a Service Deployment Guide: Getting started](#)

[Tanium as a Service Deployment Guide: Configuring Salesforce identity provider](#)

Configure IT Service Center user group

Configure a user group in Tanium for the ITSC Agent users of IT Service Center. For more information about creating user groups and assigning users, see the Tanium documentation.

1. In your Tanium as a Service instance, create an `ITSC Agents` user group.
2. Assign the following roles to the user group:
 1. API Gateway User
 2. Deploy Operator
 3. Discover Operator
 4. Interact Power User
 5. Performance Operator
3. Assign users to the `ITSC Agents` user group. The email address of the users must be identical to the user email addresses in IT Service Center. Save your changes.

More information

[Tanium Console User Guide: Managing user groups](#)

Deploy Tanium Client

To enable your Tanium as a Service (TaaS) instance to communicate with your endpoints, install the Tanium Client on the Windows, Mac, and Linux systems that you want to manage.

To get started with installing and deploying the Tanium Client, see the Tanium documentation.

After the Tanium Client is installed on your assets and reporting to your TaaS instance, you can start to see asset information, manage performance, and deploy software to the endpoints from within the IT Service Center.

More information

[Tanium Client Management User Guide: Downloading Tanium Client](#)

Install IT Service Center

Use the Work.com installer to install and automatically complete some configuration for the IT Service Center managed package. Then, follow the prompts to complete the manual, post-installation setup steps.

Before you begin



Before you install IT Service Center, log into your Salesforce org URL with administrative credentials that were provided in your welcome email.

Required editions

Available in: Lightning Experience
Available in: Enterprise and Unlimited editions
IT Service Center is available as an add-on license.

User permissions

User Permissions Needed	
To configure installed packages:	Customize Application

Allowlist



If any IP address restrictions exist in your org or profile, you might need to edit your settings before installing this package. Confirm the Salesforce installer IP addresses aren't within any restricted ranges, or add them to an allowlist:

- 18.214.2.206
- 3.89.46.237
- 52.201.65.75
- 52.2.53.142

You can remove these IP addresses from your allowlist when installation completes.


Supported languages



At this time, translations for IT Service Center might not be fully available.









Install the IT Service Center package

1. Navigate to this URL in your browser: <https://install.work.com/products/itsc>



The Salesforce installer service is used only for the installation and initial configuration of the IT Service Center package.

2. Click the **IT Service Center** tile.
3. Click **Install and Configure IT Service Center**.
4. Click **Log In to Start Pre-Install Validation**.
5. Select your org type. Enter your Salesforce username and password.
6. Click **Allow** to run the pre-installation validation.
7. In the Connected to Salesforce box, confirm that you're logged in to the correct org. *If the pre-install validation fails, use the error messages in the installer to troubleshoot and complete the pre-installation requirements in your org. When you're ready, return to the installer URL and try again.*
8. Review the list of customizations the installer makes in your org.

Steps	Type	
Enable OmniChannel for Case Skills-based Routing	 Metadata	Required
Enable Entitlements for Case Milestones	 Metadata	Required
Add Case Status Picklist Values	Other	Required
Install IT Service Center Managed Package	 Managed Package	Required
Create IT Service Center Permission Sets and Permission Set Groups	 Metadata	Required
Deploy Case Layouts	 Metadata	Required
Enable Path Assistant for Case	 Metadata	Required
Deploy Case Management Queues and Change Approval Board (CAB) Approval Process	 Metadata	Required
Grant access to IT Service Center Reports and Dashboards	 Metadata	Optional
Load Case Template Datasets	Other	Optional

9. Click **Install**. Click **Confirm** to accept the terms of use.

During installation, your user is assigned the IT Service Center App Administrator permissions that are needed to configure and manage the org.

Create IT Service Center users and add them to their respective permission set groups.

Follow the prompts throughout the Salesforce Help topics to complete the post-installation configuration.



The Salesforce installer service is available in English, Japanese, French, German, Spanish, and Dutch.

Verify IT Service Center installation and auto-configuration

See what is customized in your org when installing the IT Service Center packages.

Installation Step Name	What it Does
Enable OmniChannel for Case Skills-based Routing	Enables Omni-Channel settings to enable routing of work items to agents based on their skill sets.
Enable Entitlements for Case Milestones	Enables customers to set up SLAs for case milestones, such as how long it takes to initially respond to or resolve a case.
Add Case Status Picklist Values	Creates status values for cases.
Install IT Service Center Managed Package	Installs the IT Service Center package.
Create IT Service Center Permission Sets and Permission Set Groups	Creates the permission sets, and then adds them to permission set groups for IT Service Center. To use these permissions, you must manually assign users to the permission set groups. The following permission set groups are created: <ul style="list-style-type: none">IT Service Center User (IT Service Center App User and IT Service Center Standard Field Access permission sets)IT Service Center Admin (IT Service Center App Administrator and IT Service Center Standard Field Access permission sets)
Deploy Case Layouts	Sets up custom page layouts for IT Service Center cases.
Enable Path Assistant for Case	Creates paths for change, incident, problem, and request case record types.
Deploy Case Management Queues and Change Approval Board (CAB) Approval Process	<ul style="list-style-type: none">Creates the following queues to prioritize, distribute, and assign records to teams who share workloads for change approvals (CAB) and case management. You must assign users or groups to each queue:<ul style="list-style-type: none">Case Management - IT DefaultCase Management - IT EscalationCase Management CABCreates the ITSC - Change Approval process, which defines the business processes around approving change case types.

Installation Step Name	What it Does
(Optional) Grant access to IT Service Center Reports and Dashboards	Creates the IT Agent default dashboard, which contains the following reports: <ul style="list-style-type: none"> • ITSC - Case Statuses for the Last 7 Days • ITSC - Cases by Status and Escalation • ITSC - Cases Created by Day (30 Days) • ITSC - Mean Time to Resolution • ITSC - Open Cases by Type • ITSC - Resolution Trend
(Optional) Load Case Template Datasets	Creates templates to enable the creation of additional cases out of Tanium actions on an asset or set of assets.

Configure IT Service Center

Set up the connection to Tanium as a Service, configure users, and set up emails.

Connect with Tanium as a Service

Connect to Tanium as a Service (TaaS) to pull information and operate on the end user devices with your IT Service Center org.

Add TaaS as a remote site

Remote sites are a list of Web addresses that the organization can invoke from salesforce.com.

1. From Setup, enter `remote` in the Quick Find box, then select **Remote Site Settings**.
2. Click **New Remote Site**.
3. For the Remote Site URL, enter the main URL of your TaaS instance.
4. Click **Save**.

Connect to TaaS

Connect Salesforce to your TaaS instance, so that IT agents can take direct actions on endpoints.

1. From the **App Launcher**, click the **IT Service Center** app.
2. In the **IT Service Center** menu, click **Settings**.
3. On the **Tanium Configuration** page, enter your **Tanium URL**, which is the URL of the Tanium as a Service instance that is provisioned. You do not need to customize the API URL. Click **Save**.

Authenticate the service user

The Service User runs background processes. This TaaS user ID and password is provided when you purchase IT Service Center.

1. From the IT Service Center menu, go to **Settings**.
2. Click **Initiate Service User Auth Flow**.
3. In the page that pops up, click **Authorize**.
4. The expiration date under **Service User Authorization** is updated.

Authenticate current user

Each IT Service Center user must authenticate their user ID with TaaS to have permission to view and operate on Assets in IT Service Center.

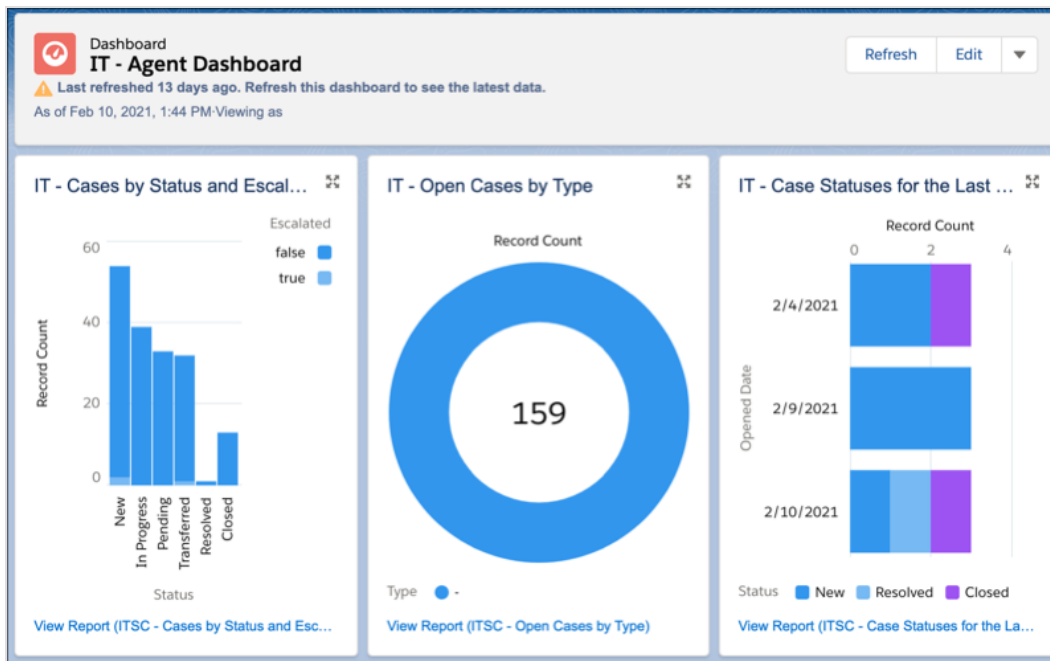
1. From the IT Service Center menu, go to **Settings**.
2. Click **Initiate Current User Auth Flow**.
3. In the page that pops up, click **Authorize**.
4. The expiration date under **Current User Authorization** is updated.

View and customize IT Agent dashboard

You can customize the IT agent dashboard to include the reports that help you manage your work.

View IT Agent dashboard

View the IT Agent Dashboard on the home page when you open IT Service Center.



Customize IT Agent dashboard

You can customize the IT Agent dashboard to include different reports, including the default reports that come with IT Service Center.

1. From the home page, click **Open** to open the dashboard in its own view. Click **Edit**.
2. Move, edit, and customize the existing components in the dashboard. To add other reports to the dashboard, click **+Component**.
3. Save your changes.

Assign IT Service Center permissions

Permissions control what users see and do. The workplace permissions are automatically created when you install the IT Service Center package, but you must manually assign users their appropriate permissions.

Meet the IT Service Center personas

The IT Service Center package includes permission sets for personas that we recommend for Work.com orgs.

IT Service Center Admin

The IT Service Center Admin sets up the connection to Tanium as a Service (TaaS).

IT Agent

IT agents manage cases, assets, performance events, and software deployments.

Employee

Employees create cases that get resolved by the IT Agent.

Add IT Service Center users

By default, you have a single administrator user for both your Salesforce org and Tanium as a Service. If you want to add users, you must create the user in both Salesforce and Tanium.



The **User ID** in Tanium must match the **Email** field for the user in Salesforce. To create users in Tanium, see [Configure Tanium for IT Service Center on page 8](#).

CREATE AND ASSIGN USER PERMISSIONS IN SALESFORCE

Create IT Agent and ITSC Admin users in Salesforce. Use the value in the **Email** field for the user name that you create in Tanium as a Service.

The following table provides the permission sets, licenses, and profiles to assign to users associated with the IT Agent and ITSC personas.

Persona	User License	Feature License	Profile	Permission Set Licenses	Permission Sets
IT Agent	Salesforce	Service Cloud User Knowledge User	ANY	Employee Workspace Concierge Employee Experience	IT Service Center App User IT Service Center Standard Field Access

Persona	User License	Feature License	Profile	Permission Set Licenses	Permission Sets
ITSC Admin	Salesforce	Service Cloud User Knowledge User	ANY	Employee Workspace Concierge Employee Experience	IT Service Center App Administrator IT Service Center Standard Field Access
Employee	Salesforce	Service Cloud User Knowledge User		Employee Workspace Concierge Employee Experience	IT Service Center Standard Field Access

IT Service Center permission sets

If you followed the recommended setup process for IT Service Center, confirm you have these permission sets in your org.

Permission Set Name	Description
IT Service Center App Administrator	Full edit access within IT Service Center, including service settings. Included in the IT Service Center package.
IT Service Center App User	Manage cases in IT Service Center.
IT Service Center Standard Field Access	Access fields for standard objects.

When you follow the recommended installation and configuration process, these permission sets are automatically organized into permission set groups. Assign permission set groups to users to grant them the required level of access.

When the installation of the IT Service Center is complete, the IT Service Center App Administrator permission is assigned to the first admin user.



IMPORTANT

Permission updates to the IT Service Center package are pushed to our recommended permission sets. Any customizations made to our recommended permission sets are erased when the package updates.

Assign record types to case lightning record pages

Edit the case page layouts to assign the IT Service Center record types for change and problem.

1. From Setup, click **Object Manager**.
2. Click **Case** and **Lightning Record Pages**. Click the page you want to edit, then click **View**. You must edit both the change record page and problem record page, so repeat these steps for each.
To update the change record page, click: **ITSC - Change Record Page**.
To update the problem record page, click: **ITSC - Problem Record Page**.
3. After the Lightning App Builder for the page loads, click **Activation...**
4. Click the **App, Record Type, and Profile** tab and then **Assign to Apps, Record Types, and Profiles**.
5. Select **IT Service Center**, then **Next**.
6. On the **Selected Record Types** page, select the corresponding record type. If you do not update
If you are editing the **ITSC - Change Record Page**, select **Change**.
If you are editing the **ITSC - Problem Record Page**, select **Problem**.
7. On the **Selected Profiles** page, select **Standard User** and **System Administrator**.
8. Save your changes.

Create Incident ticket category for Employee Concierge

Add a ticket category for incidents to create incident case types in Employee Concierge. Use this incident case type for all tickets that go to IT Service Center.

Add ticket category picklist values

To enable users of Employee Concierge to create incidents in IT Service Center, add an **Incident** value to the Ticket Category custom field in the Case object. You can also deactivate the existing **IT** value so that users of Employee Concierge create incidents by default.

1. From Setup, click **Object Manager**.
2. Click **Case** then **Fields & Relationships**.
3. Search for and select **Ticket Category**.
4. In the Values section, click **New**.
5. Create the label as **Incident** and the API name as **Incident**.
6. Save your changes.
7. Deactivate the existing **IT** value in the picklist. In the Action column, click **Deactivate**.

Add a quick action to the Contact object

1. From Setup, click **Object Manager**.
2. Click **Contact** and **Buttons, Links, and Actions**.
3. Click the row that contains **New Incident**, and ITSCNewIncident.

4. Click **Edit Layout** and add the **Ticket Category** field to the layout.
5. Click **Save**.

Add the custom metadata type for the Incident ticket category

To associate a ticket category with the related action, edit the custom metadata type.

1. From Setup, use Quick Find to search for and select **Custom Metadata Types**.
2. From the table, click **Ticket Category Definitions**.
3. Click **Manage Ticket Category Configurations**. Click **New**.
4. Use the following field values:
 1. **Label:** Incident
 2. **Name:** Incident
 3. **Ticket Category Name:** Incident
 4. **Global Action Name:** Contact.wkitsm__ITSCNewIncident
 5. **Is Active:** Enabled
5. Save your changes.

Set up email for automatic ticket creation

Create an email service and address to which an end user can send support requests. When emails are sent to this address, cases get created automatically.

Create an email service

1. In the Setup app, go to the **Email Services** page. Click **New Email Service**.
2. Enter a service name. For the **Apex Class**, select `EmailToCaseHandler`.
3. To limit the domains or email addresses from which you accept emails, fill in the allowed list in the **Accept Email From** field.
4. If necessary, customize the other fields to handle attachments, headers, and failure response settings.
5. Click **Save**.

Set up email address

1. Click the name of the service you created, then click **New Email Address**.
2. Give the email address a name of your choice. (Example: `IT_Support`).
3. Enter `ITSupport` in the **Email Address** field.

4. Verify that the **Active** checkbox is checked.
5. Enter your company's email domain names. (Example: `company.org`, `my.company.org`) Click **Save**.

The **Email Addresses** section shows the Email Address you just created. If emails are sent to this address, IT tickets get created automatically.

More information

[Apex Developer Guide: Apex Email Service](#)

[Enhance Salesforce with Code: Email Services](#)

(Optional) Customize Milestones, Queues, Assignment Rules, and Approvals

To define more advanced workflows for your IT case management, you can use milestones, queues, and assignment rules in Service Cloud.

To customize the behavior of these workflows, see the related information in the Service Cloud documentation.

- Set up Milestones, which represent required, time-dependent steps in your support process, like first response or case resolution times. Milestones are added to entitlement processes to ensure that agents resolve support records correctly and on time.

More information: [Service Cloud Docs: Milestones](#)

- Set up Queues to prioritize, distribute, and assign records to teams who share workloads. Access Queues from list views. Queue members can jump in to take ownership of any record in a queue. The following queues are defined by IT Service Center:

- Case Management - IT Default
- Case Management - IT Escalation
- Case Management CAB

More information: [Service Cloud Docs: Set Up Queues](#)

- Set up Assignment Rules to define conditions that determine how leads or cases are processed. The rules assign leads and cases to the specified user or queue.

More information: [Service Cloud Docs: Set Up Assignment Rules](#)

- Edit the **ITSC - Change Approval** approval process to define the business process around resolving a Change case. The **ITSC - Change Approval** process is shipped with IT Service Center and used by default.

More information: [Service Cloud Docs: Set Up an Approval Process](#)

View log messages

View log messages for IT Service Center, including actions that were taken within a case.

View case actions

The following actions that you can take from a case are recorded: deploying software, restarting an asset, terminating process, starting or stopping processes.

- To view all actions that were taken on all assets that are managed by IT Service Center, go to the IT Service Center Menu, and click **Case Actions**.
- To view the actions within a case, go to the **Recent Activity** pane.

View log recordings

To view service logs, including logs for background processes and scheduled jobs, go to the IT Service Center Menu, and click **Case Actions**.