



# **KIX Pro Add-on Modules**

KIX 17 User Manual - EN

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# 1 Field Service

With the "Field Service" module, you can create and manage deployment tours for your field service employees. The tours contain "mobile data sets" (MDS) in order to support the use of mobile devices for your field service employees. The mobile devices can also be used offline and only have to be connected to the Internet or the company network for the download/upload of the "mobile data sets". This allows the technician to work with tickets, configuration entries, and FAQ entries, even if they are not able to establish a connection to the server at that moment.

The data required for their field service tour is packed and transmitted to their mobile device. In addition, the MDS file is encrypted in order to maximize data security.



## 1.1 Field Service – App

The Field Service app is a mobile application (app) for Android devices in order to provide data from KIX offline on the end device for service technicians. This is to ensure that they can work in areas without an Internet connection. The service technicians can view the necessary data with the app and document their work. Once all work has been carried out, this documentation can be synchronized with the server again.

### 1.1.1 Conditions

To be able to use the app, the following conditions have to be met:

- A mobile end device (smartphone, tablet, etc.) with Android 4.0 or higher.
- Network connection between the mobile end device and KIX server for the download/upload.

### 1.1.2 Installing the App

The app is not available in the Google Play store. If you would like to download the app, enter the following URL in the browser of the mobile end device:

"http://<FQDN KIX-Server>/kix-web/FieldService.apk"

Once downloaded, open the file: FieldService.apk.

#### Please note

In the Android device's system settings, you may have to change the setting for installing apps from "unknown sources".

### 1.1.3 Configuring the Server URL

So that the app can communicate with the KIX server, the KIX server URL has to be specified in the app. If you are starting up the app for the first time, you will be asked to enter the server URL.

- Example: "http://<FQDN KIX-Server>/kix/index.pl"

### 1.1.4 Registering Device ID in KIX

Once the server URL has been configured, the app displays a screen with a link "*DeviceID anzeigen (Display DeviceID)*". If you tap on this link, you will see the device ID.

This device ID must be entered in KIX for the ConfigItem that the mobile end device represents as the

"Seriennummer (Serial number)" attribute. This information is important so that the mobile data sets for the relevant mobile end device can be generated and transmitted.

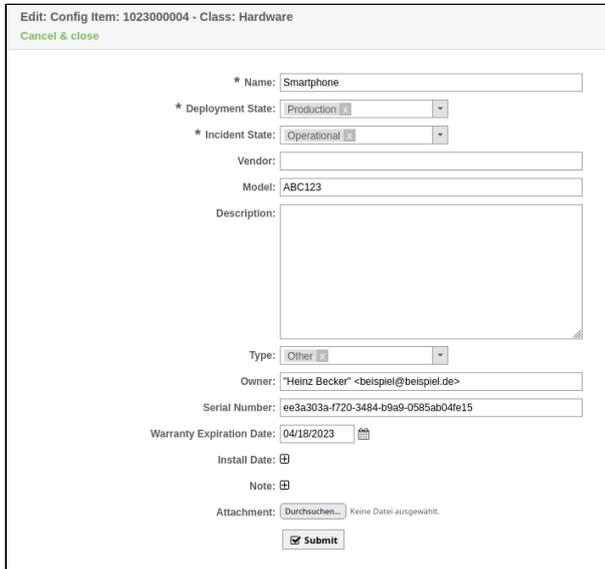


Figure: ConfigItem – Serial Number Attribute

## 1.1.5 Downloading Tours

Once you start the app, the login screen appears.

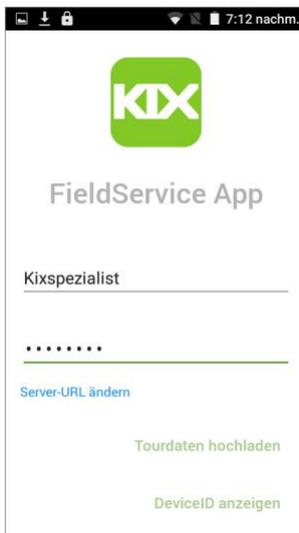


Figure: Login

- Enter KIX login name.
- Enter the KIX password.

If new tours are available for the agent, a corresponding message is shown.

- Tap the link "Download Tour Data".
- Once the mobile data set has been downloaded, a tour list appears on the screen with all tours assigned to the mobile end device.

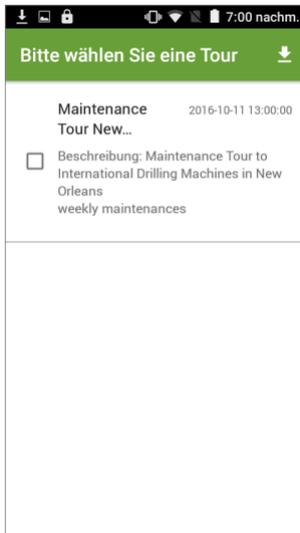


Figure: Tour List

- Tap a tour entry in list.
- A screen opens in which you are prompted to enter your personal passphrase.

That is the passphrase that you have specified as an agent in KIX in the personal settings. (Information on the passphrase: -> "Field Service" section). If the passphrase is entered incorrectly, the tour data cannot be decrypted.

### 1.1.6 Working with a Tour

If tour data has been decrypted after passphrase has been entered, screen with tour menu appears. All of the objects assigned to tour (such as tickets, FAQ entries, or Configitems) are displayed on screen.

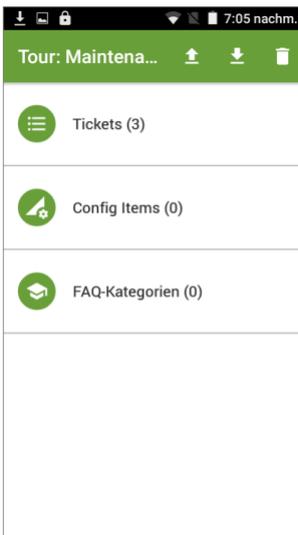


Figure: Tour Menu

- In tour menu, tap "Tickets".
- A list of all tickets assigned to this tour appears.

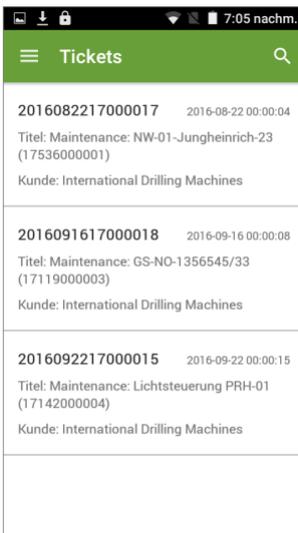


Figure: Ticket list

- Tap an entry in ticket list.
- Ticket zoom view for selected ticket appears.

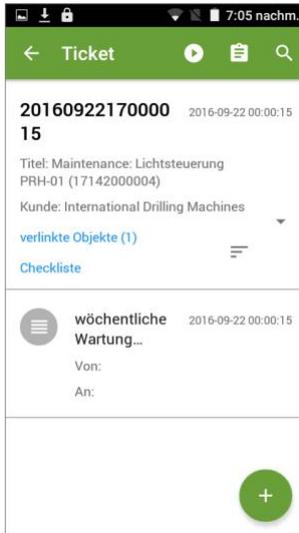


Figure: Ticket Zoom View

The ticket zoom view is divided into two areas. In the upper area, information concerning the ticket is displayed as well as information on which objects may be linked to the ticket. In the lower area, the list with articles for this ticket is displayed.

### 1.1.7 Adding Articles

In order to document work, you have the option of creating articles for the ticket in the ticket zoom view. Images and files can be attached to the article, for example logs for maintenance.

- In ticket zoom view, tap  button.
- The screen "Create article" appears.

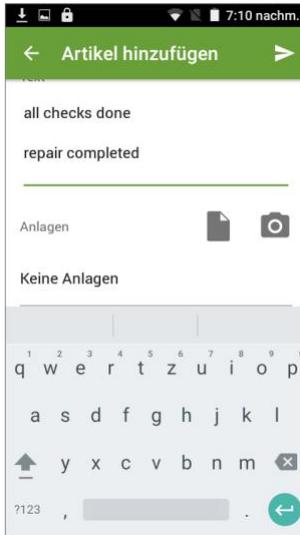


Figure: Adding Articles

- Enter an article text.
- Tap  if you want to add an attachment to the article.
- Tap  if you want to add an image to the article.
  - If you have pressed the  button, the camera app of the mobile end device opens and you have the option to take an image. If you save the image with the "Save" symbol, you are directed to a screen where you have the option of highlighting areas of the image in color. If you click the trash can symbol, you can undo changes. In order to save the changes, click small arrow symbol in toolbar. The image is saved as an attachment to the article.
- Finally, tap  button.
- The screen with the ticket zoom view appears. Newly create article appears in article list.

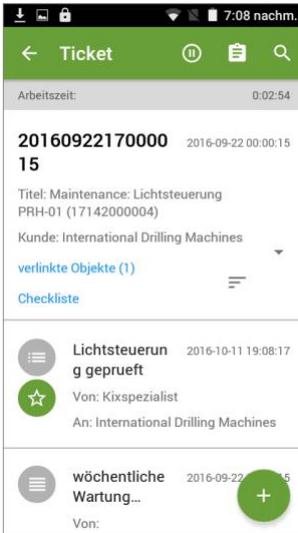


Figure: Ticket Zoom View

### 1.1.8 Working Time Recording and Signature

The app provides the option of recording working times on a ticket and signing the recorded time with a signature.

- In ticket zoom view, tap  button, in order to start timer for working time.
- In ticket zoom view, tap  button, in order to stop timer for working time.
- Recorded working time is saved in ticket data.
- In ticket zoom view, tap  button.
- "Work summary" screen opens.



Figure: Work summary

Here you have the option of attaching your signature with a suitable pen.

- Tap button and return to the ticket zoom view.
- A new article with information about recorded time and signature as a .png file is created.

### 1.1.9 Uploading Completed Tour(s)

If all work for a tour is completed and everything has been documented, the data for the tour can be uploaded to the KIX server again.

- To upload, tap  symbol in toolbar while you are in tour menu.

OR for upload of multiple tours:

- To upload, tap  symbol in toolbar while you are in tour list.
- A screen for entering the user name and password appears.

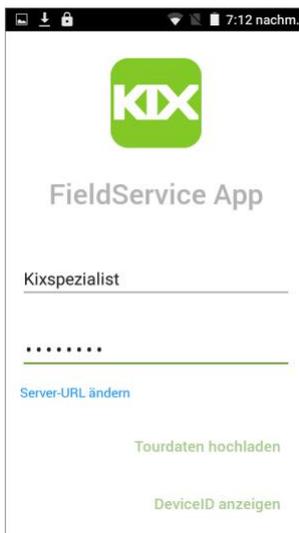


Figure: Uploading Tour Data

- Enter a user name and password and select "Upload Tour Data".
- Tour data is synchronized with KIX server, tour is closed, and tour data deleted from mobile end device.



### 1.1.9.1

#### Working with ConfigItems

The tour data may also include ConfigItems if this has previously been configured and linked accordingly. If you tap ConfigItem area in tour menu, detail view of ConfigItem opens. All attributes and values of ConfigItem are visible here. Linked objects, attachments, or images (thumbnails) are also displayed.

### 1.1.9.2 Working with FAQ Entries

The tour data may also include FAQ articles if this has previously been configured and linked accordingly. If you tap ConfigItem area in tour menu, corresponding FAQ article opens. FAQ articles can only be read.

## 1.2 Field Service - Tour Management

- [Tour State](#) (see page 14)
- [Creating a Personal Passphrase](#) (see page 15)
- [Creating a Target Device for the Mobile Data](#) (see page 15)
- [Creating a New Tour](#) (see page 16)
- [Adding Objects to a Tour](#) (see page 18)
- [Creating a Mobile Data Set \(MDS\)](#) (see page 20)
- [Adding Tickets to a Tour](#) (see page 21)
- [Adding Tickets via Drag & Drop](#) (see page 22)
- [Map View – Kanban Extension](#) (see page 24)
- [Displaying "My tours"](#) (see page 28)

### 1.2.1 Tour State

State	Description
New	<p>If a tour has the state "new", it is only available in "Tour Management". The tour is visible nowhere else in the system and no objects can be added to the tour.</p> <p>Tours with this state can be deleted.</p>
In preparation	<p>A tour with the state "In preparation" is available to add data. Objects such as tickets, ConfigItems, or FAQ entries can be assigned to the tour. When the objects have been assigned to a tour, a service agent (technician) and a target device MUST be assigned to the tour so that the mobile data set (MDS) can be created.</p> <p>Tours with this state can be deleted.</p>
Ready for dispatching	<p>When the mobile data set (MDS) has been created, the tour has the state "Ready for dispatching". Tours with this state are available for download on the assigned target device.</p>
Dispatched	<p>Once the tour data has been downloaded on the mobile device, the tour has the stat "Dispatched".</p>

State	Description
Closed	Once the tour data has been uploaded from the mobile device to the server, the altered tour data is synchronized with the server and the tour receives the state "Closed".
Canceled	Tours with the state "Canceled" can be deleted.

## 1.2.2 Creating a Personal Passphrase

In order to upload/download the mobile data, you have to specify the personal passphrase in the app. Each agent sets this passphrase in their personal settings in KIX.

- Click button to retrieve personal settings.
- Enter any character string in "Passphrase" field.

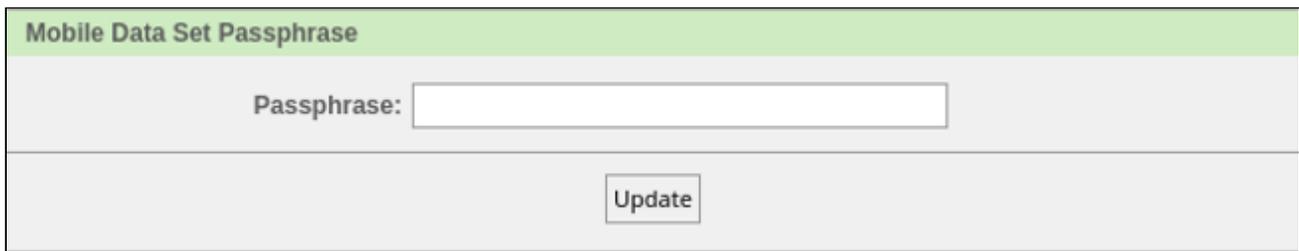


Figure: Creating a Passphrase

- Click button. The passphrase is saved in the system.

## 1.2.3 Creating a Target Device for the Mobile Data

To transmit the data to a mobile end device, a ConfigItem from the "Hardware" class has to be created in KIX for the relevant mobile end device.

- In "CMDB" menu, click menu item "New".
- In the list, click "Hardware" class.
- The "Edit: ConfigItem: ...." dialog appears

**Edit: Config Item: 1023000004 - Class: Hardware**

[Cancel & close](#)

\* Name:

\* Deployment State:  x

\* Incident State:  x

Vendor:

Model:

Description:

Type:  x

Owner:

Serial Number:

Warranty Expiration Date:  

Install Date:

Note:

Attachment:  Keine Datei ausgewählt.

Figure: Editing ConfigItem Dialog

- Enter the data for the mobile end device into the input fields. The "Serial Number" attribute must be specified.
- Finally, click button.

## 1.2.4 Creating a New Tour

- In "Field Service" menu, select "Tour Management" menu item.
- The area where the tours can be managed opens. You can see all tours created here in a list.

Tour Management											
Filter		List of tours									
NAME	DESCRIPTION	STATUS	PLANNED START	TARGET DEVICE	ASSIGNED SERVICE AGENT	RESPONSIBLE	CREATED	CHANGED	DELETE	EDIT	
Auslieferung		new	09/10/2020 08:00		Hans Müller	Hans Müller	09/24/2020 11:17	09/24/2020 11:17			
Auslieferung		preparation	11/16/2020 08:00		Hans Müller	Hans Müller	11/12/2020 09:50	11/12/2020 09:50			
Auslieferung_Neu		ready for distribution	09/21/2020 08:00	Smartphone (1023000004)	Hans Müller	Hans Müller	09/24/2020 11:35	09/24/2020 14:48			
Tour4	Tour4	preparation	04/21/2017 08:00		Hans Müller	Hans Müller	04/20/2017 11:49	06/21/2017 09:08			
Tour5		preparation	05/01/2017 08:00		Hans Müller	Hans Müller	04/25/2017 10:14	04/25/2017 10:14			

Figure: Tour Management

- Click button.
- "Create new tour" widget opens.

Tour Management	
<p>Actions</p> <p> Go to overview</p>	<p>Create new tour</p> <p>Details <span>Linked Objects (0)</span></p> <p>* Name: <input type="text" value="Delivery"/></p> <p>Description: <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div></p> <p>* State: <input type="text" value="new"/></p> <p>* Planned Start: <input type="text" value="07/14/2021"/> <input type="text" value="12:30"/></p> <p>Planned End: <input type="checkbox"/> <input type="text" value="07/14/2021"/> <input type="text" value="12:30"/></p> <p>Actual Start: <input type="checkbox"/> <input type="text" value="07/14/2021"/> <input type="text" value="12:30"/></p> <p>Actual End: <input type="checkbox"/> <input type="text" value="07/14/2021"/> <input type="text" value="12:30"/></p> <p>* Assigned Service Agent: <input type="text" value=""/></p> <p><small>PLEASE NOTE: Agents without a Mobile Data Set passphrase are not shown.</small></p> <p>* Responsible User: <input type="text" value="Bill Miller"/></p> <p>Target Device: <input type="text" value=""/></p> <p><input checked="" type="checkbox"/> Save and back to tour list or <input type="checkbox"/> Save or Cancel</p>

Figure: Tour Management – Create New Tour

Line title	Content
Name	Specify a designation for the tour here.
Description	Specify a description for the tour here.
State	Select a state from the drop-down menu here.
	<div style="border: 1px solid #ccc; padding: 10px;"> <p> <b>Please note</b></p> <p>The mobile data record can only be created if the tour is in the "In preparation" status.</p> </div>
Planned Start	Enter a date and time for the planned start of tour here.
Planned End	Enter a date and time for the planned end of tour here.

Line title	Content
Actual Start	Enter a date and time for the actual start of tour here.
Actual End	Enter a date and time for the actual end of tour here.
Assigned service agent	<p>Select a responsible service agent here.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>ⓘ Please note</b></p> <p>Agents who have not configured a passphrase for the mobile data record are not displayed.</p> </div>
Responsible	Select a responsible person here.
Target Device	Specify the ID of the target device here.

- Finally, click or button.

## 1.2.5 Adding Objects to a Tour

If a tour has been created, objects can be added to the tour. Objects can be tickets, FAQ entries, and ConfigItems.

- In "Field Service" menu, select "Tour Management" menu item.
- The area where the tours can be managed opens. You can see all tours created here in a list.
- Click a tour from the list that you want to add objects to .
- "Edit tour" widget opens.
- Click button.
- "Link objects" pop-up opens:

**Link Object:**  
Close dialog or go to link delete screen

---

**Select Target Object**

Link object with:  Select

---

**Search**

Ticket#:

Title:

Fulltext:

Priority:  ☰

Type:  ☰

State:  ☰

Queue:  ☰

Q Search

Figure: 'Link Objects' Pop-Up

- In the drop-down menu "Link object with", select the object type that you want to link with the tour.
- Using the "Search" widget, you can search for the desired object by specifying a search criterion.
- Search results found are shown in "Suchergebnisse: (Search results:) Objekt (Object)" widget in a list.

▲ Search Result: Ticket

Select all

SELECT	TICKET#	TITLE	TYPE	QUEUE	STATE	CREATED	LINKED AS
<input type="checkbox"/>	2017041210000045	Gerätewartung Computer	Maintenance	Raw	open	04/12/2017 11:35:19	-
<input type="checkbox"/>	2017112310000011	Gerätewartung am Computer "Achilles"	Maintenance	Misc	new	11/23/2017 15:20:23	-
<input type="checkbox"/>	2017112310000047	Gerätewartung Computer	Maintenance	Raw	open	11/23/2017 16:09:37	Part of
<input type="checkbox"/>	2019032010000037	new computer needed	Incident	Entscheidung	pending reminder	03/20/2019 11:04:47	-

Add links

Figure: Search Results

- Mark the objects in the list that you want to assign to the tour with .
- In the drop-down list, select the link type "Part of".
- Click button "Create link"
- The objects are linked to the tour and are visible in the "Linked Objects" tab.

Edit tour: Tour4

Details **Linked Objects (11)**

▲ **Linked: Ticket**

Select all

<input type="checkbox"/>	TICKET#	TITLE	TYPE	QUEUE	STATE	CREATED	LINKED AS
<input type="checkbox"/>	2017020717000019	Kann nicht telefonieren	ITSM-Incident	Misc	new	02/07/2017 13:15:06	Part of
<input type="checkbox"/>	2017041810000016	Maintenance: Achilles (1722000001)	Maintenance	Misc	open	04/18/2017 03:00:02	Part of
<input type="checkbox"/>	2017041910000014	Maintenance: Achilles (1722000001)	Maintenance	Misc	open	04/19/2017 03:00:21	Part of
<input type="checkbox"/>	2017042010000011	Maintenance: Achilles (1722000001)	Maintenance	Misc	open	04/20/2017 03:00:22	Part of
<input type="checkbox"/>	2017050310000015	Maintenance: Achilles (1722000001)	Maintenance	Misc	open	05/03/2017 03:00:06	Part of
<input type="checkbox"/>	2017062810000011	Maintenance: MOD1 (1022000004)	Maintenance	Misc	open	06/28/2017 03:00:19	Part of
<input type="checkbox"/>	2017100410000012	Maintenance: MOD1 (1022000004)	Maintenance	Misc	open	10/04/2017 03:00:14	Part of
<input type="checkbox"/>	2017112310000047	Gerätewartung Computer	Maintenance	Raw	open	11/23/2017 16:09:37	Part of
<input type="checkbox"/>	2019032010000019	new maintenance ticket	Maintenance	Change Reports	new	03/20/2019 10:33:34	Part of
<input type="checkbox"/>	2020082417000014	Wartung	Service Request	Projekte	processing	08/24/2020 14:54:54	Part of
<input type="checkbox"/>	2021071417000015	Server down - need help!	Incident	Infrastruktur	open	07/14/2021 12:32:43	Part of

Figure: Tour Management – Linked Objects

## 1.2.6 Creating a Mobile Data Set (MDS)

In order that a mobile data set (MDS) can be created, the following requirements have to be met:

- An object has to be assigned to the tour.
- A service agent has to be assigned to the tour.
- A target device has to be assigned to the tour.
- In "Field Service" menu, select "Tour Management" menu item.
- Click a tour from the list. The detailed view for the selected tour opens.
- If required, select the state "In preparation" if this tour does not yet have this state.

**Note**

Mobile data sets can only be created if a tour has the status "In preparation".

- Click button. If the button is not visible, then one or more requirements are not fulfilled.
- "Create mobile data set" pop-up appears.

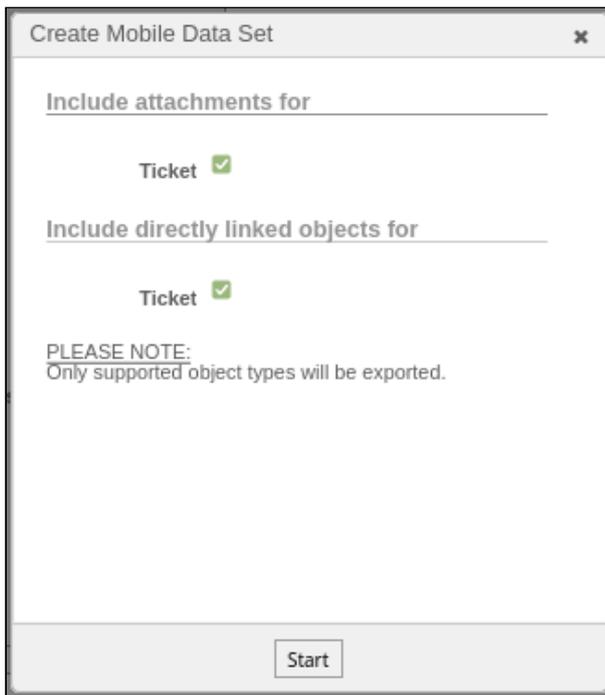


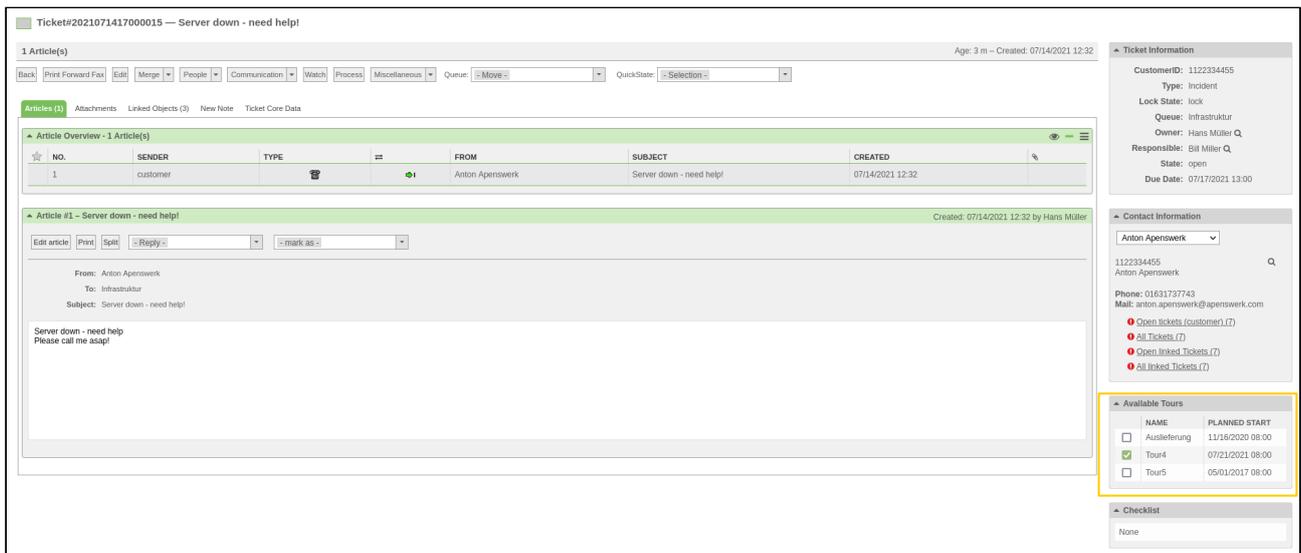
Figure: Create Mobile Data Set Pop-Up

- With , select whether the attachments or directly linked objects are to be taken over into the mobile data set (MDS) for an object type.
- Finally, click button.

## 1.2.7 Adding Tickets to a Tour

You can assign tickets to a tour if you are in the detail view for a ticket.

- To do so, retrieve the detail view of the ticket.



**Articles (1)**

NO.	SENDER	TYPE	FROM	SUBJECT	CREATED
1	customer		Anton Apenwerk	Server down - need help!	07/14/2021 12:32

**Article #1 - Server down - need help!**

From: Anton Apenwerk  
To: Infrastruktur  
Subject: Server down - need help!

Server down - need help!  
Please call me asap!

**Available Tours**

NAME	PLANNED START
<input type="checkbox"/> Auslieferung	11/18/2020 08:00
<input checked="" type="checkbox"/> Tour4	07/21/2021 08:00
<input type="checkbox"/> Tour5	05/01/2017 08:00

Figure: Ticket Zoom View

- Mark the tour in "Available tours" widget in the sidebar with  .
- The ticket is linked to the tour.

## 1.2.8 Adding Tickets via Drag & Drop

Tickets can also be added to a tour from the Kanban View via drag & drop. Required for this is that at least one tour has already been created. The created tour is then visible in "Verfügbare Touren (Available tours)" widget in sidebar on the right.

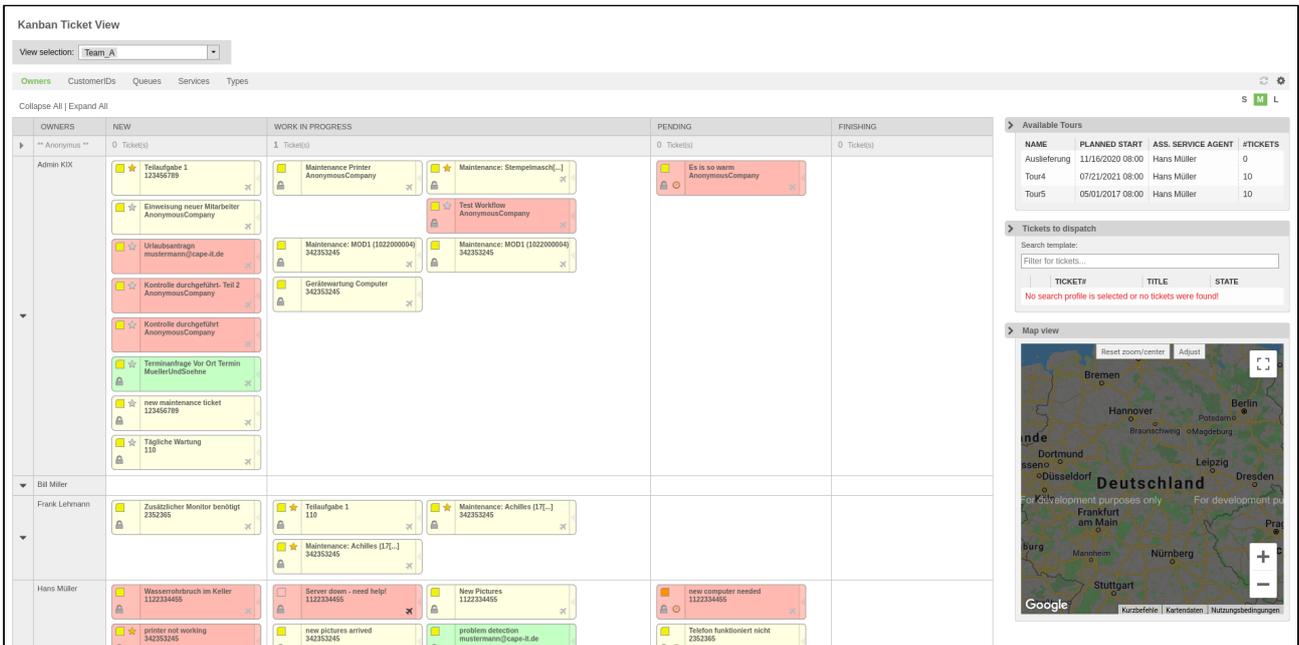


Figure: Kanban View with "Available tours" Widget

If you move over airplane symbol with mouse cursor, symbol turns blue. This enables you to "grab" the ticket. If you now press and hold the left mouse button, you can move the ticket from the Kanban View to a tour in "Available tours" widget (drag & drop principle). The tour is then highlighted in color in the widget:

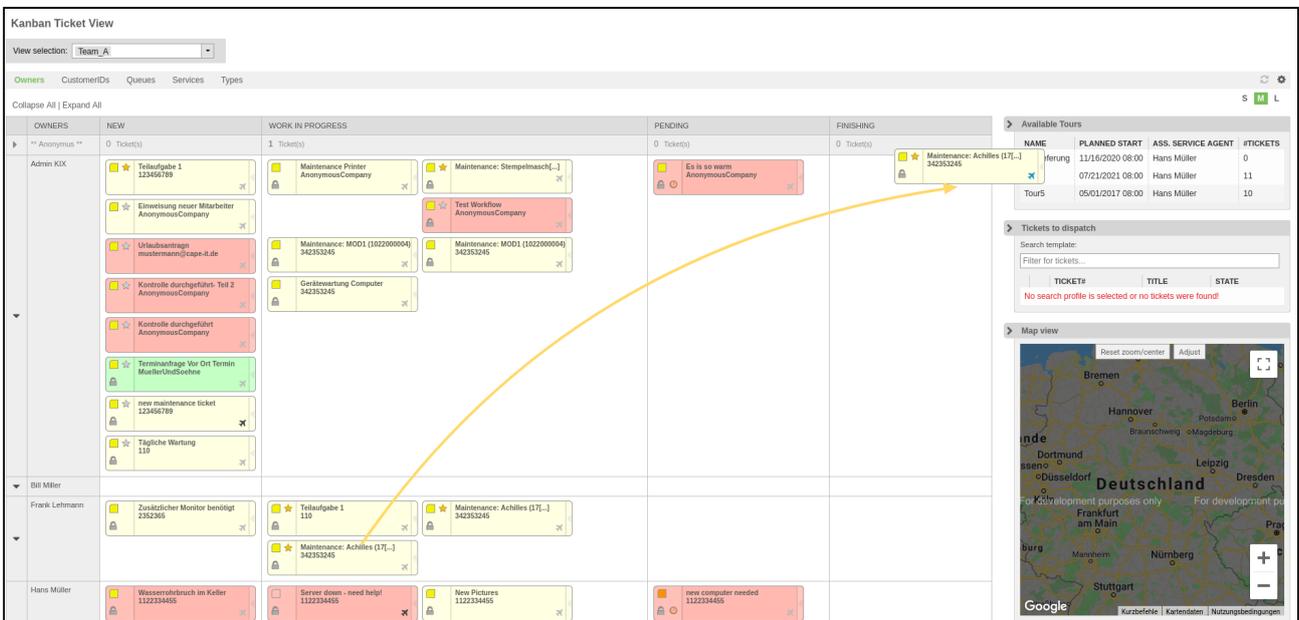


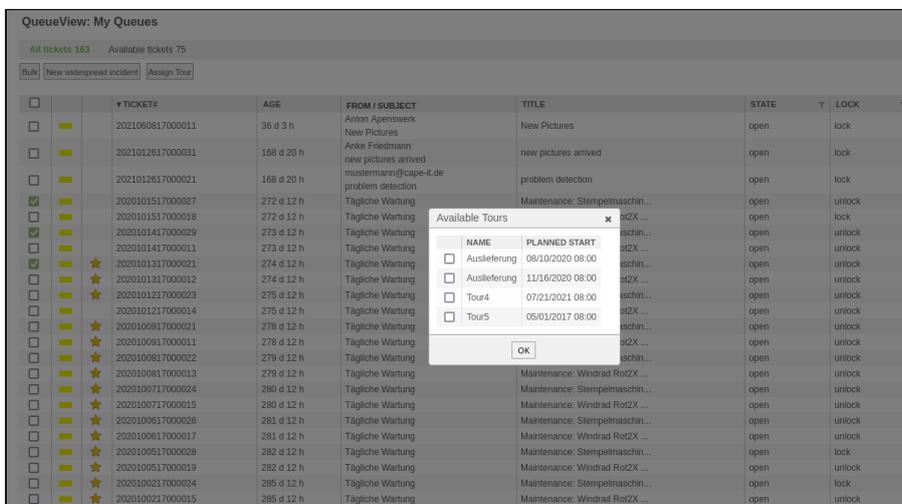
Figure: Moving a Tour via Drag & Drop

If you then release the left mouse button, the ticket is assigned to this tour. Next to the tour, a symbol appears in the tickets column and the number of tickets (#Tickets) is updated.

In the ticket views (Queue view/Service view/Status view/Escalation view), you have the option of assigning multiple tickets to a tour.

- To do so, click a ticket view in "Tickets" menu.
- Mark the tickets that you want to assign to a tour with .
- Click button.

"Available tours" pop-up opens



The screenshot shows a table of tickets with columns for TICKET#, AGE, FROM / SUBJECT, TITLE, STATE, and LOCK. An 'Available Tours' pop-up window is overlaid on the table, listing tours with their names and planned start times. The pop-up has a title bar 'Available Tours' and an 'OK' button at the bottom.

TICKET#	AGE	FROM / SUBJECT	TITLE	STATE	LOCK
2021060817000011	36 d 3 h	Anton Apenswerk New Pictures	New Pictures	open	lock
2021012617000031	168 d 20 h	Anke Friedmann new pictures arrived	new pictures arrived	open	lock
2021012617000021	168 d 20 h	muslemann@capa-r.de problem detection	problem detection	open	lock
2020101517000027	272 d 12 h	Tagliche Wartung	Maintenance: Stempelmaschin...	open	unlock
2020101517000018	272 d 12 h	Tagliche Wartung	g2X ...	open	lock
2020101417000029	273 d 12 h	Tagliche Wartung	g2X ...	open	unlock
2020101417000011	273 d 12 h	Tagliche Wartung	g2X ...	open	unlock
2020101317000021	274 d 12 h	Tagliche Wartung	g2X ...	open	unlock
2020101317000012	274 d 12 h	Tagliche Wartung	g2X ...	open	unlock
2020101217000023	275 d 12 h	Tagliche Wartung	g2X ...	open	unlock
2020101217000014	275 d 12 h	Tagliche Wartung	g2X ...	open	unlock
2020100917000021	278 d 12 h	Tagliche Wartung	g2X ...	open	unlock
2020100917000011	278 d 12 h	Tagliche Wartung	g2X ...	open	unlock
2020100817000022	279 d 12 h	Tagliche Wartung	g2X ...	open	unlock
2020100817000013	279 d 12 h	Tagliche Wartung	Maintenance: Windrad Rot2X ...	open	unlock
2020100717000024	280 d 12 h	Tagliche Wartung	Maintenance: Stempelmaschin...	open	unlock
2020100717000015	280 d 12 h	Tagliche Wartung	Maintenance: Windrad Rot2X ...	open	unlock
2020100617000026	281 d 12 h	Tagliche Wartung	Maintenance: Stempelmaschin...	open	unlock
2020100617000017	281 d 12 h	Tagliche Wartung	Maintenance: Windrad Rot2X ...	open	unlock
2020100517000028	282 d 12 h	Tagliche Wartung	Maintenance: Stempelmaschin...	open	lock
2020100517000019	282 d 12 h	Tagliche Wartung	Maintenance: Windrad Rot2X ...	open	unlock
2020100217000024	285 d 12 h	Tagliche Wartung	Maintenance: Stempelmaschin...	open	lock
2020100217000015	285 d 12 h	Tagliche Wartung	Maintenance: Windrad Rot2X ...	open	unlock

Figure: Available tours

- Mark tour that you want to assign tickets to with .
- Finally, click button.

The tickets are linked to the tour.

## 1.2.9 Map View – Kanban Extension

You can find further information on using the Kanban Board in the "Kanban Board" section. This section describes only the use of the Kanban Board sidebar "Map view". In the "Map view", you can see all locations of the tickets shown in Kanban Board. In the "Tickets to dispatch" widget, all tickets that can be dispatched are shown. You can see in the next section how the positions on the map are determined. Please be aware that each ticket can be represented more than once on the map, depending on the address information found. In the "Available tours", all available tours are shown.

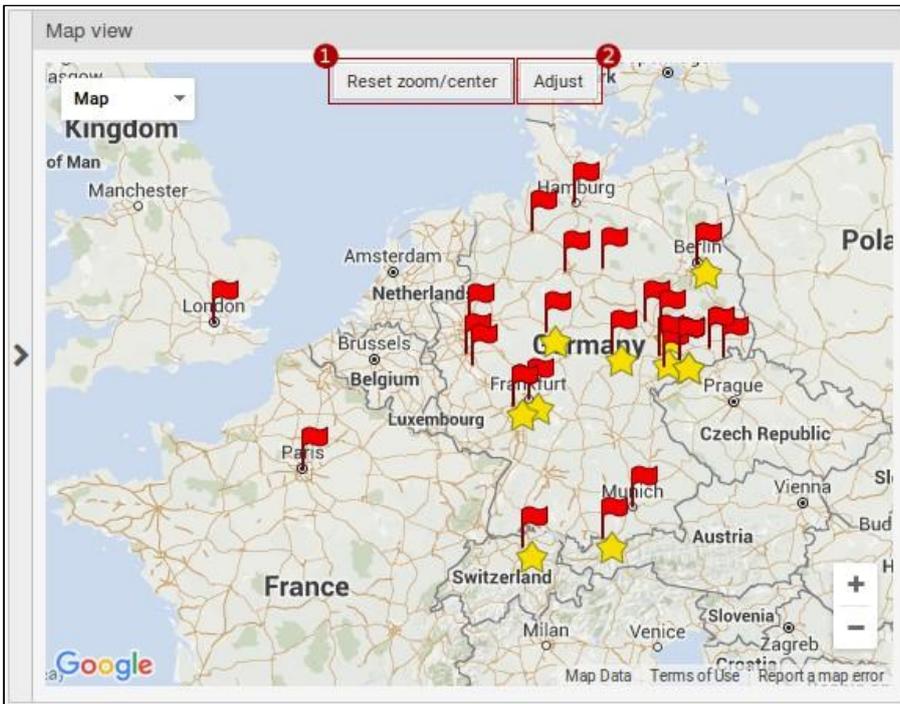


Figure: Map View

When you move the cursor over a ticket card in Kanban Board, the corresponding flags for the location on the map are highlighted in blue.

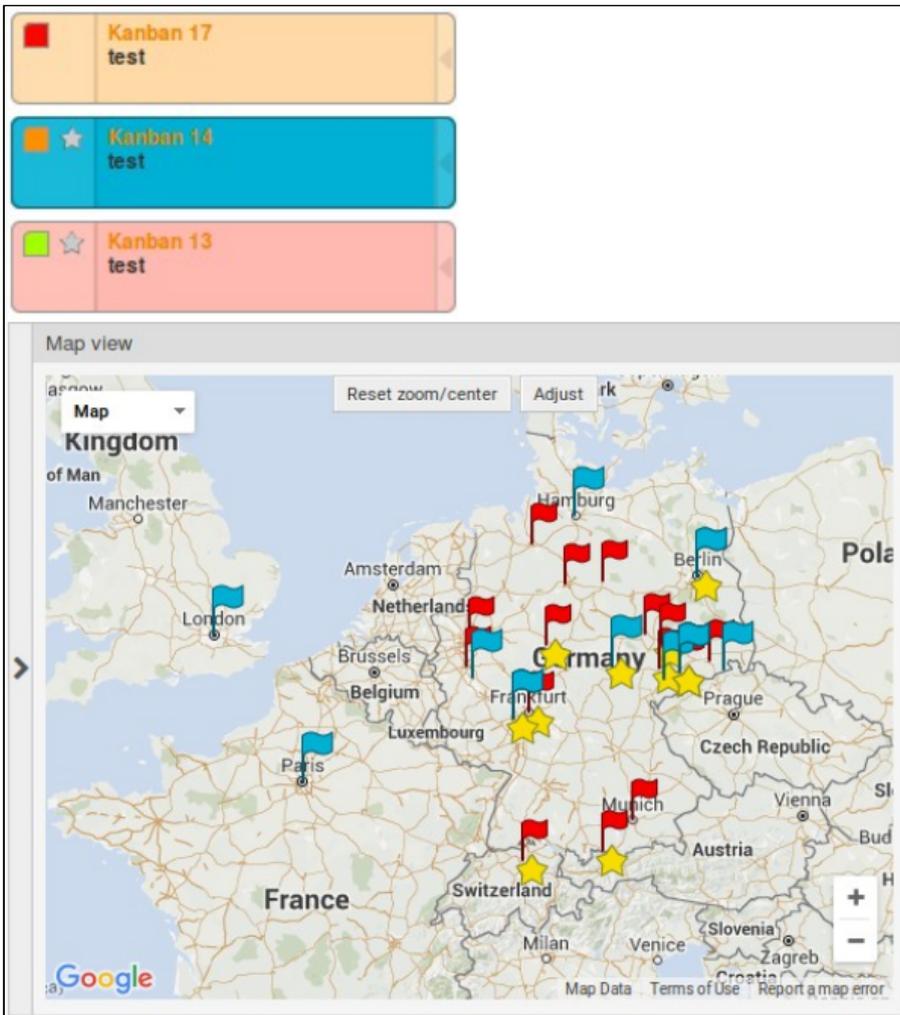


Figure: Example of Highlighted Flag Symbols

When you move the cursor over an entry in "Tickets to dispatch" widget, the star symbol for the location on the map is highlighted in blue.

**Tickets to dispatch**

Search template: Sidebar

Filter for tickets... 1 2 3

	TICKET#	TITLE	STATE
>	2015110910000078	Sidebar 6	open
	2015110910000069	Sidebar 5	open
	2015110610000109	Sidebar 4	pending reminder
	2015110610000092	Sidebar 3	open
	2015103010000011	Sidebar 2	pending reminder

---

**Map view**

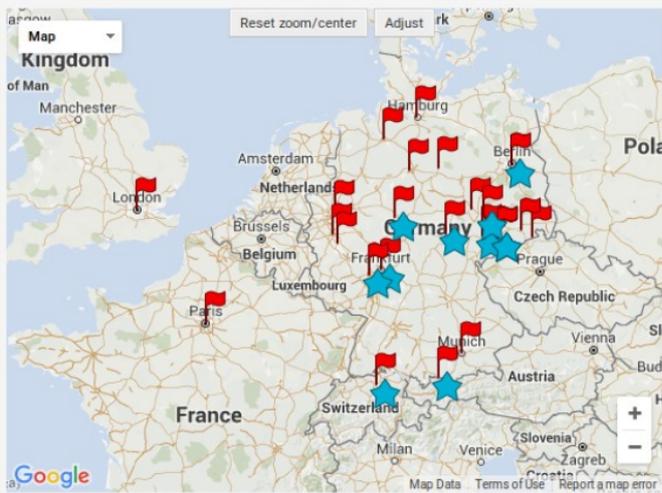


Figure: Example of Highlighted Star Symbols

You can highlight all tickets in a swimlane of the Kanban Board (move cursor over the second column of the swimlane). You can highlight all tickets from a ticket group (zoom setting "s" selected) by moving the cursor over a ticket group. You can display all tickets to be dispatched in the map by moving the cursor over the table header of the "Verteilbare Tickets (Tickets to dispatch)" table.

If you hide "Tickets to dispatch" or "Available tours" widgets in the sidebar, then the star symbols in the map view are hidden. All flags are also hidden if you hide a swimlane in Kanban Board. However, highlighting of flags (moving cursor over a swimlane) also works when one or multiple swimlanes are hidden. The flags are highlighted for as long as the cursor is over the swimlane. For example, this is useful if all swimlanes are hidden and you simply want to show the positions of tickets from a certain swimlane.

In the Kanban View configuration, you can configure a map center and a zoom setting in "Other setting" widget.

**Other Settings (Team\_A)**

**SORT**

Age

**ORDER BY**

descending

**REFRESH KANBAN VIEW AFTER**

10 minutes

With this symbol in the kanban view (next to the configuration symbol) you can de-/activate the refresh.

**NUMBER OF TICKETS PER PAGE OF TICKET GROUPS (SMALL VIEW)**

30

**ZOOM LEVEL FOR MAP**

6

**MAP CENTER**

51.163375,10.447683

An address or latitude and longitude coordinates (separated by comma) are possible.

Figure: Kanban View Configuration – "Other setting" Widget

With "Reset zoom/center" button, the map can be reset to the position specified in the configuration settings. With "Adjust" button, the map can be adjusted according to the markers present on the map.

- Searching for address data includes the following points:
- Determining address data for all ConfigItems linked to the relevant ticket.
- If the linked ConfigItems themselves do not have any address data themselves (e.g. incorrect class), the search algorithm checks the ConfigItems linked to the ConfigItems up to the maximum configured depth.
- The first address data found for a ConfigItem directly linked to the ticket is used.
- If no address data can be determined (e.g. if no CMDB is available or the ticket does not have any linked ConfigItems or no address data can be found for them), the address data for the contact person for the ticket is used instead.

## 1.2.10 Displaying "My tours"

Using "My Tours" function, you, as a service employee, can display the tours assigned to you.

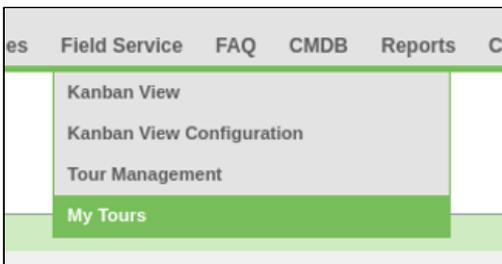


Figure: "My Tours"

- To do so, click "My Tours" menu item in "Field Service" menu item. A list with the tours assigned to you opens.

Tour Management

Filter		List of tours									
NAME	DESCRIPTION	STATUS	PLANNED START	TARGET DEVICE	ASSIGNED SERVICE AGENT	RESPONSIBLE	CREATED	CHANGED	DELETE	EDIT	
Auslieferung		new	08/10/2020 08:00		Hans Müller	Hans Müller	08/24/2020 11:17	08/24/2020 11:17	🗑️	✎	
Auslieferung		preparation	11/16/2020 08:00		Hans Müller	Hans Müller	11/12/2020 09:50	11/12/2020 09:50	🗑️	✎	
Auslieferung_Neu		ready for distribution	08/21/2020 08:00	Smartphone (1023000004)	Hans Müller	Hans Müller	08/24/2020 11:35	08/24/2020 14:48	🗑️	✎	
Tour4	Tour4	preparation	04/21/2017 08:00		Hans Müller	Hans Müller	04/20/2017 11:49	09/21/2017 09:08	🗑️	✎	
Tour5		preparation	05/01/2017 08:00		Hans Müller	Hans Müller	04/25/2017 10:14	04/25/2017 10:14	🗑️	✎	

Actions  
+ Create new tour

Figure: "Tour Management"

In the right area, you filter the list of tours shown in the "Filter (Filter)" widget, for example according to name or state. If you click the name of a tour in the "Name (Name)" column, a widget with details concerning this tour and which objects (for example tickets) the tour is linked with opens.

## 2 Kanban Board

### 2.1 Kanban View Configuration

You can adapt the display of the Kanban view. To do this, select the menu item "Kanban View Configuration" in the "Kanban View" menu.

In the area on the left, you can select a view that has already been created from the list. In the area on the right, the settings for this view are contained in various widgets.

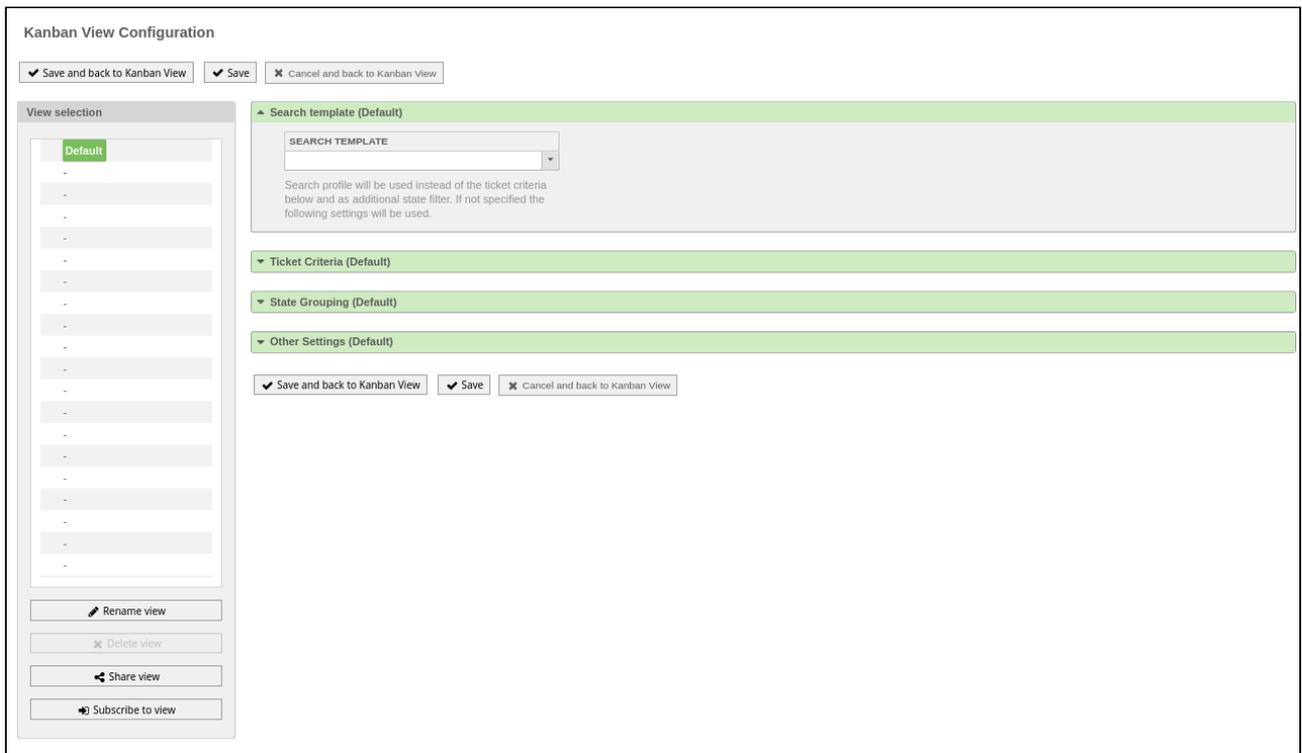


Figure: Kanban View Configuration

#### 2.1.1 Defining an Individual Kanban View

To create an individual Kanban board, proceed as follows:

- In "View selection" area, click - symbol.



Figure: View Selection

- A pop-up "View name (new)" appears.

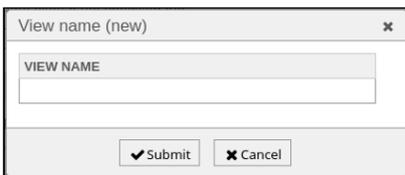


Figure: View Name Pop-Up

- Enter name for the view.
- Click "Submit" button.
- The view appears in the "View selection" list.

Using the widgets in the right screen area, you can define the Kanban View.

In the "Search template" widget, you can select a search template that may already have been created and apply it to the Kanban View.

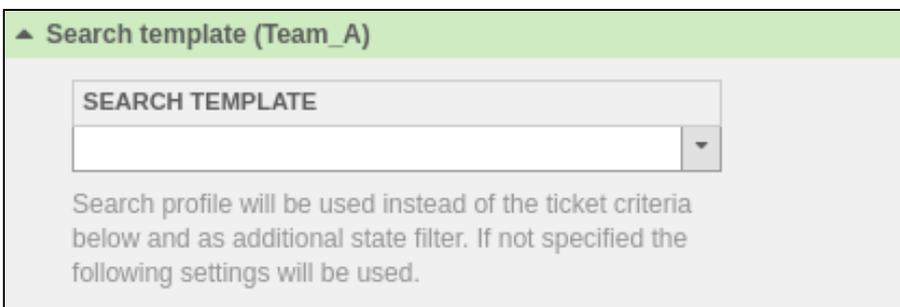


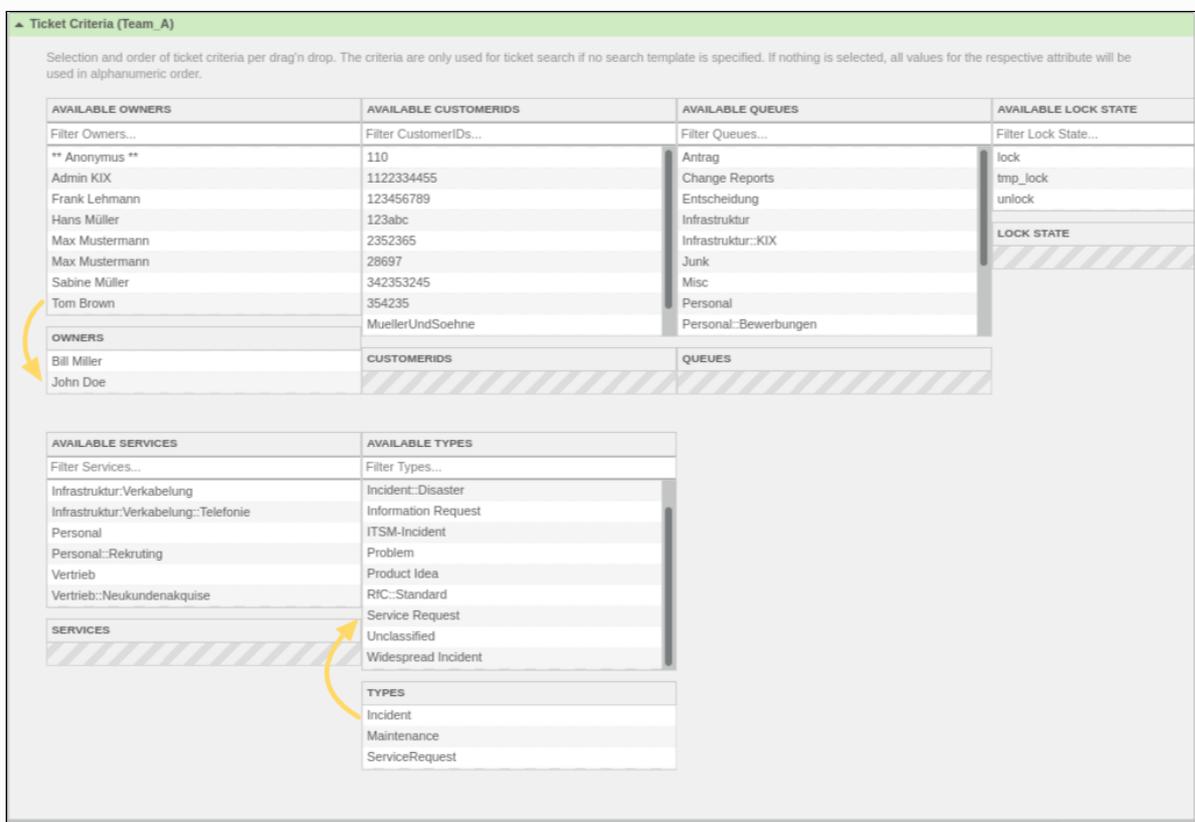
Figure: Search Template

In "Ticket Criteria" widget, you determine according to which criteria tickets are displayed in the swimlane categories. In doing so, you can determine that only tickets from certain owners or tickets related to certain customer IDs are displayed, for example.

Move the desired values out of or into "Available ..." area via drag & drop.

**i** Practical example

- The agent Tom Brown is added to the "Owners" list from the "Available owners" list. The editors Tom Brown, Bill Miller and John Doe then appear in the overview on the Kanban Board.
- The ticket type "Incident" is removed from the Kanban board by moving it from "Types" back to "Available types".



Selection and order of ticket criteria per drag'n drop. The criteria are only used for ticket search if no search template is specified. If nothing is selected, all values for the respective attribute will be used in alphanumeric order.

AVAILABLE OWNERS	AVAILABLE CUSTOMERIDS	AVAILABLE QUEUES	AVAILABLE LOCK STATE
Filter Owners...	Filter CustomerIDs...	Filter Queues...	Filter Lock State...
** Anonymus **	110	Antrag	lock
Admin KIX	1122334455	Change Reports	tmp_lock
Frank Lehmann	123456789	Entscheidung	unlock
Hans Müller	123abc	Infrastruktur	
Max Mustermann	2352365	Infrastruktur:KIX	LOCK STATE
Max Mustermann	28697	Junk	
Sabine Müller	342353245	Misc	
Tom Brown	354235	Personal	
	MuellerUndSoehne	Personal:Bewerbungen	
<b>OWNERS</b>	<b>CUSTOMERIDS</b>	<b>QUEUES</b>	
Bill Miller			
John Doe			

AVAILABLE SERVICES	AVAILABLE TYPES
Filter Services...	Filter Types...
Infrastruktur:Verkabelung	Incident:Disaster
Infrastruktur:Verkabelung:Telefonie	Information Request
Personal	ITSM-Incident
Personal:Rekrutung	Problem
Vertrieb	Product Idea
Vertrieb::Neukundenakquise	RF:Standard
<b>SERVICES</b>	Service Request
	Unclassified
	Widespread Incident
	<b>TYPES</b>
	Incident
	Maintenance
	ServiceRequest

Figure: Example ticket criteria

- In order to make the created view available to other colleagues, you have to share this view. The button "Share view" is located in the left menu bar
- After clicking the button, a pop-up window opens. Select a category here to which the view to be split should be added or create a new category.
- In the view selection, the split view is identified by the "Share" icon.
- In order for an agent to have this shared view displayed in the view selection on their own Kanban board, they must select it using the "Subscribe to view" button in their own Kanban view configuration.

- i** When subscribing to shared views in the Kanban Board, do **not** go to Save, but exit the configuration without any further action. This is the only way to ensure that you receive updates from the creator of the view.
- Background: If a view is subscribed to and the user clicks on "Save", the view becomes a copy and the subscription is cancelled. This means that the subscription is converted into a personal view. Consequently, you will NOT see any changes made by the original creator.
- If you are not sure whether you have clicked Save, proceed as follows:
- Select the "presumed subscription" view in the configuration.
  - Check whether the button "Share view" is greyed out. If it is not, the view has been saved and the subscription cancelled.
  - Delete the copied view.
  - Subscribe to the desired view again without saving.

In "State Grouping" widget, you can assign the ticket state the four meta-states (Pending/New/Work in progress/Finishing).

Move the ticket state out of the "Available States" area and into the desired meta-state area via drag & drop.

**i** Practical example

- In addition to the ticket status "open", the "processing" column is added to the "Work in progress" column on your Kanban board. This means that all tickets from the correspondingly selected processors (previous step) with the ticket status "open" and "processing" appear on the Kanban Board in the "Work in Progress" column.

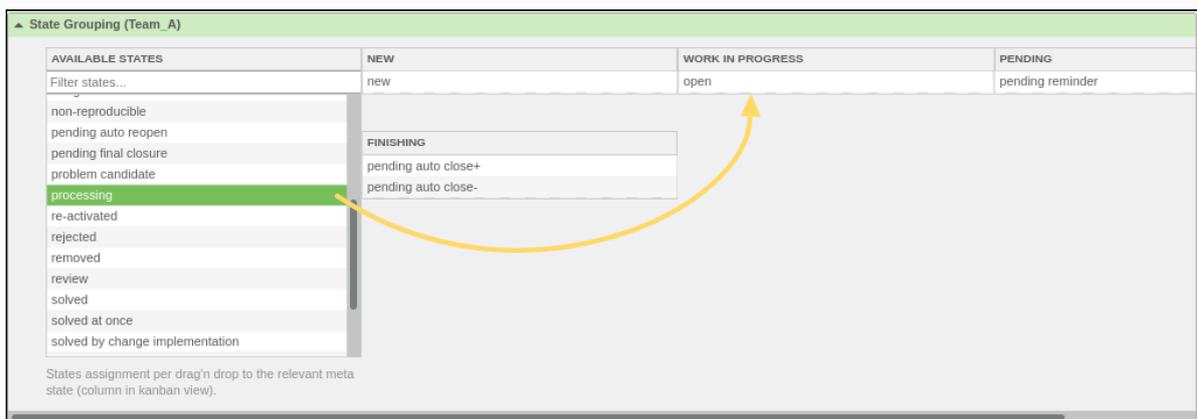


Figure: State grouping

You can make further refinements in the "Other Settings" widget:

- Sorting according to a certain criterion (e.g. age of the ticket)
- Sort by ascending or descending
- Time after which the Kanban board is updated (update time of the Kanban view after)
- Number of tickets displayed per page of a ticket group
- Zoom level for the map
- Indication of the center of the map shown (indication of an address or latitude and longitude are possible)

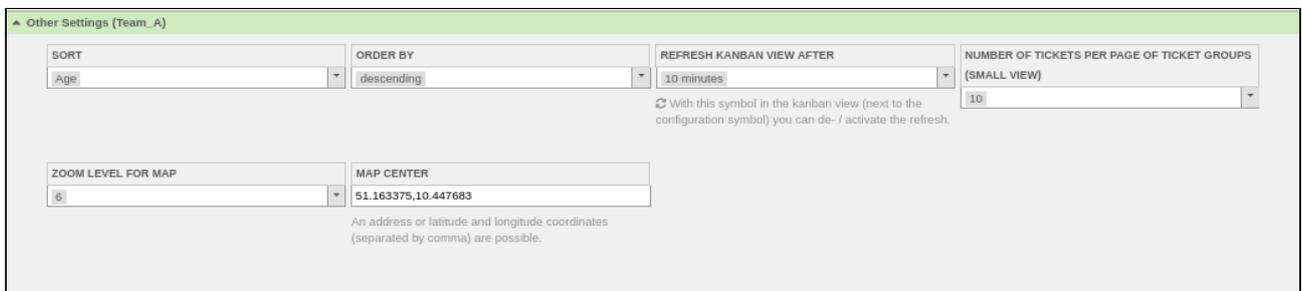


Figure: Other Settings



Figure: Update Kanban View setting

**i** With this symbol  in the kanban view (next to the configuration symbol) you can de- / activate the refresh. Once it is activated, it stays activated.

### 3 KPI Dashboard

KIX Professional offers the possibility of importing practice-oriented KPI data from KIX Professional directly into Microsoft Power Pivot via XML data feed.

The data in the display is graphically processed in such a way that you can provide your management with a meaningful presentation of the data.

You can also view the data on a dashboard directly in KIX Professional.

The KPI dashboard is integrated in the KIX menu in the "Reports" menu and is also based on the usual authorization model of KIX. The KPI evaluations can be created, changed, or deleted by administratively authorized agent groups. The data for the evaluations can be filtered according to various criteria here. The basic principle is for authorized administrators to create organization-specific KPI dashboards based on the standard dashboard and store them for use in the KPI dashboard area.

Read-only statistics users are allowed to use, run, and view just these statistics.

KPI Dashboard														
Actions		List of configured dashboards												
		NAME	ONLINE	TOKEN	DESCRIPTION	SEARCH TEMPLATE	KPI DATA CALCULATION	USE PREPARED DATA	#PROCESSES	FILENAME	CREATED	CHANGED	DELETE	EDIT
+	Add Dashboard													
⬇️	Download Template (XML)													
⬇️	Download Template (ODBC)													
		Neue in 2019	🟢	XTY3y_LmUOG258tsAU		Alle:mustermann	live	yes 🟢	▶ 1	KPIDashboardDefaultXML.xlsx	03/15/2017 14:41	03/19/2019 18:57	🗑	🔗
		New tickets 2019	🟢	J9ooEMzq8ZLE2_C8wqDN		Alle:mustermann	live	yes 🟢	▶ 1	Financial Sample.xlsx	03/19/2019 18:59	03/19/2019 18:59	🗑	🔗
		New tickets 2021	🟢	Z1LB22ZTvdImR4ojc			live	yes 🟡	▶ 1	KPIDashboardDefaultXML_(1).xlsx	05/07/2021 14:05	05/07/2021 14:05	🗑	🔗

Fig.: Example for KPI Dashboard

### 3.1 Creating KPI Dashboard for Export into Microsoft Excel Power Pivot

- Click the "Download Template (XML)" button to download an XML template for Excel

OR

- Click the "Download Template (ODBC)" button to download an ODBC template for Excel.
- Save the template file.
- Click the Create Dashboard button.
- Specify a name for KPI dashboard in "Name" field.
- Copy dashboard URL to clipboard.
- Specify a description for KPI dashboard in "Description" field. (optional)
- Select "yes" value in "enable online dashboard" field if you want an online version of the dashboard.
- If required, select a search template in "Search template" field.

This setting allows you to select one of your ticket search templates in order to search for relevant tickets for this KPI dashboard. If no search template is selected, KPI database view will be used instead.

**⚠** If database view is used, a KPI cron job must be activated in the system and run at least once. Otherwise, an error message appears.

- In "*KPI data calculation*" field, select whether you want a live calculation of the KPI data or whether you would like to use pre-calculated KPI data.
  - "calculate dead on time / live" = the data is calculated on the basis of the search template.
  - "use pre-calculated data from DBView" = the data is calculated from the DB view.

**i Please note**

Changing this setting will also change the available attributes within the attributes list. If "use pre-calculated data from DBView" is selected, the calculated attributes are removed and all attributes from the DB view are added.

- In "*use prepared data*" field, select whether you would like to use prepared data.
  - "yes" = the data must be calculated in advance. Use "*play*" button in "*List of configured dashboards*".
  - "no" = the data is only calculated when the online dashboard or the dashboard in Microsoft Excel is called up.
- In "*#Processes*" field, select how many parallel processes are to be used for KPI data calculation.

**⚠** The higher the number of processes, the higher the system load on the KIX server. Pay attention to the number of CPUs of the KIX server.  
This option always generates the selected number of parallel processes, irrespective of the actual physical CPU configuration of your KIX server!  
If you set the number of processes to be equal to or greater than the number of CPUs of your KIX server, you will adversely affect the performance of the KIX server while the data calculation is being carried out.

- In "*selected attributes*" field, select which attributes are to appear in KPI data.

Depending on the selection made for "*Search template*" and "*KPI data calculation*" options and depending on the configured available attributes in SysConfig, you can select the attributes which are to be included in the KPI data here.

- In "*Permission*" field, select the users/user groups who are allowed to have access to the KPI data.
- In "*Attachment*" field, select XLS template file you downloaded earlier.

**i** Microsoft Excel checks whether the specified URL exists. The URL does not exist in the system until the newly created KPI dashboard is initially saved. As this field is a mandatory field in KIX, a file must be specified as an attachment when newly creating a KPI dashboard. The XLS template file is ideal for this.

- Finally, click "Submit" button.
- The dashboard is now available in "*List of configured dashboards*":

## 3.2 Configuring the Data Connection to KIX in Microsoft Excel

- Open XLS template file in Microsoft Excel.
- Optional:
  - In the "Data" menu, select the "Manage data model" button. A dialog opens with an upgrade note for Power Pivot. Confirm this with "OK".
  - Excel then wants to restart the updated workbook. Confirm this with "Yes".
- In the "Data" menu, select the "Manage data model" button.
- Click the "Existing Connections" button. An "Existing connections" popup opens.
- Select "empty Default Feed" and click "Edit". A "Edit connection" popup opens.
- In the "Data Feed URL" field, paste the dashboard URL that you edited in your KIX. Click the Test Connection button. If the test is successful, click "Save".

After the connection has been saved, the Excel folder must be updated. To do this, click the "Update" button. A "Update data" popup opens.

If the data was successfully transferred from KIX, this is indicated with the status "✔ Success". Close the popup.

You can now see the KPI data from your KIX in Excel.

### 3.2.1 Add the XLS file to the KPI dashboard in KIX

Open the previously saved KPI dashboard in KIX using the "Edit" button.

In the "Attachment" field, select the XLS file that you previously saved in Excel.

The dashboard is now available in the "List of configured dashboards" and can be viewed in Microsoft Excel PowerPivot.

### 3.3 Viewing a Configured Dashboard

- In the "Reports" menu, select the "KPI Dashboard" menu item. If you have already created them, a list of configured dashboards will appear. If you have not yet created any dashboards, the list is empty.

#### 3.3.1 Output in Excel

- In "Name" column, click the name of the dashboard if you want it output in Excel.
- A dialog to allow you to save or open the file appears.
- Save the file or open it directly in Excel.

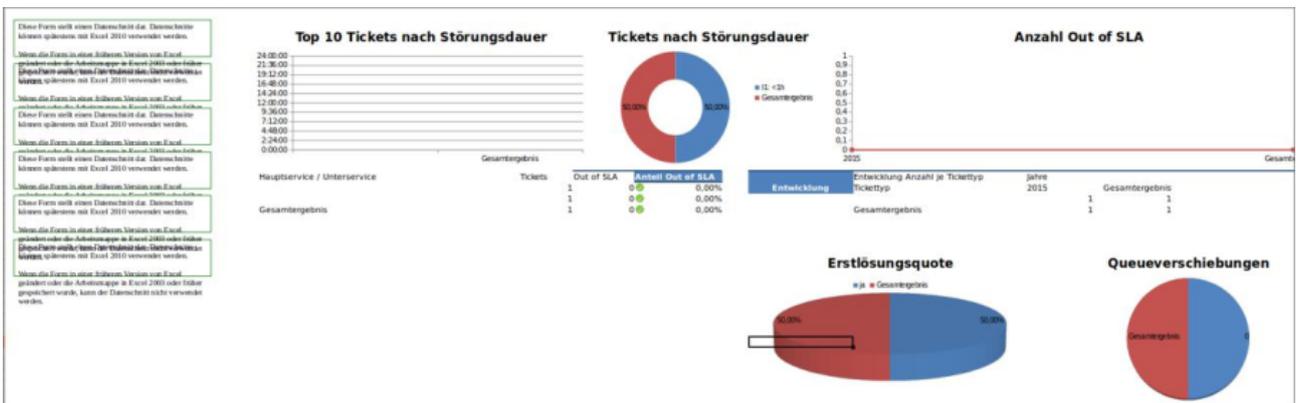


Figure: KPI Dashboard Output in Excel (example)

#### 3.3.2 Output in KIX

- In the "Online" column, click the symbol, if you want to view the output directly in KIX.

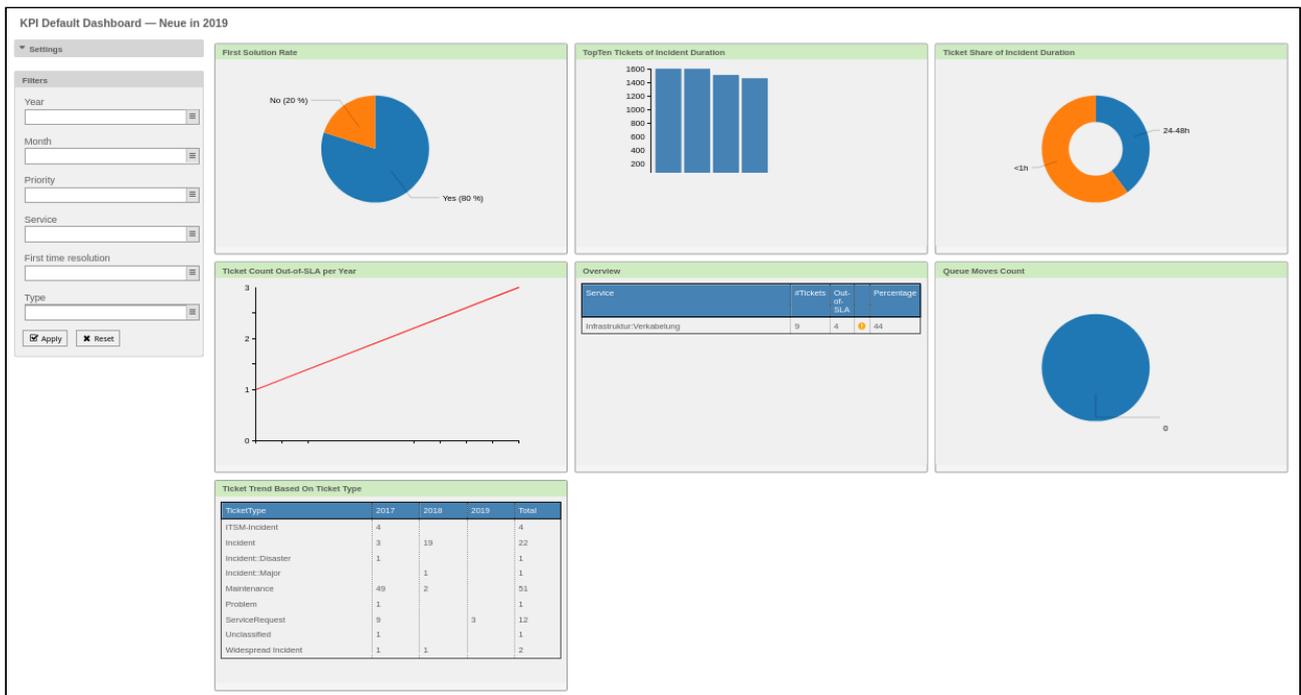


Figure: KPI dashboard output in KIX (example)

### Editing a Configured Dashboard

- In the "List of configured dashboards", click the symbol.

### Deleting a Configured Dashboard

- In the "List of configured dashboards", click the symbol.

## 4 Maintenance Planner

- [Maintenance Planner](#) (see page 39)
- [Creating a Maintenance Plan](#) (see page 40)
- [Linking a Maintenance Plan with a ConfigItem](#) (see page 42)
- [Maintenance Documentation Button](#) (see page 44)
- ["Maintenance Information" Tab in Ticket Zoom View](#) (see page 45)

### 4.1 Maintenance Planner

With the "Maintenance Planner" module, time-based, cyclical or threshold-based maintenance can be defined.

#### Information

- Time-based maintenance: Maintenance that is required at a specific point in time or in a specific time window.
  - Example: If a system or a machine part is on weekdays, on a Wednesday e.g. B. has to be serviced.
- cyclical maintenance: maintenance work that takes place at predefined time intervals.
  - Example: A system is installed every month, e.g. B. always waited on the 1st day of the month.
- Threshold-based maintenance: Maintenance work takes place when a previously defined value has been reached.
  - Example: A device is serviced every 200 hours of operation. The data for this can be entered manually on the CI or supplied via an interface.

The maintenance plans defined in this way can be linked with ConfigItems for a maintenance-relevant object (e.g. a machine). When an event is reached (time reached or threshold value reached), the KIX system automatically generates tickets for the object to be serviced.

Ticket templates can be assigned to the maintenance plan for a ConfigItem. For example, the work steps to be carried out can be described in the ticket template.

The "Maintenance Planner" module offers you:

- New ticket type "Maintenance"
- New tab "Maintenance information" in the ticket detail view
- New ticket campaign "Maintenance Documentation"

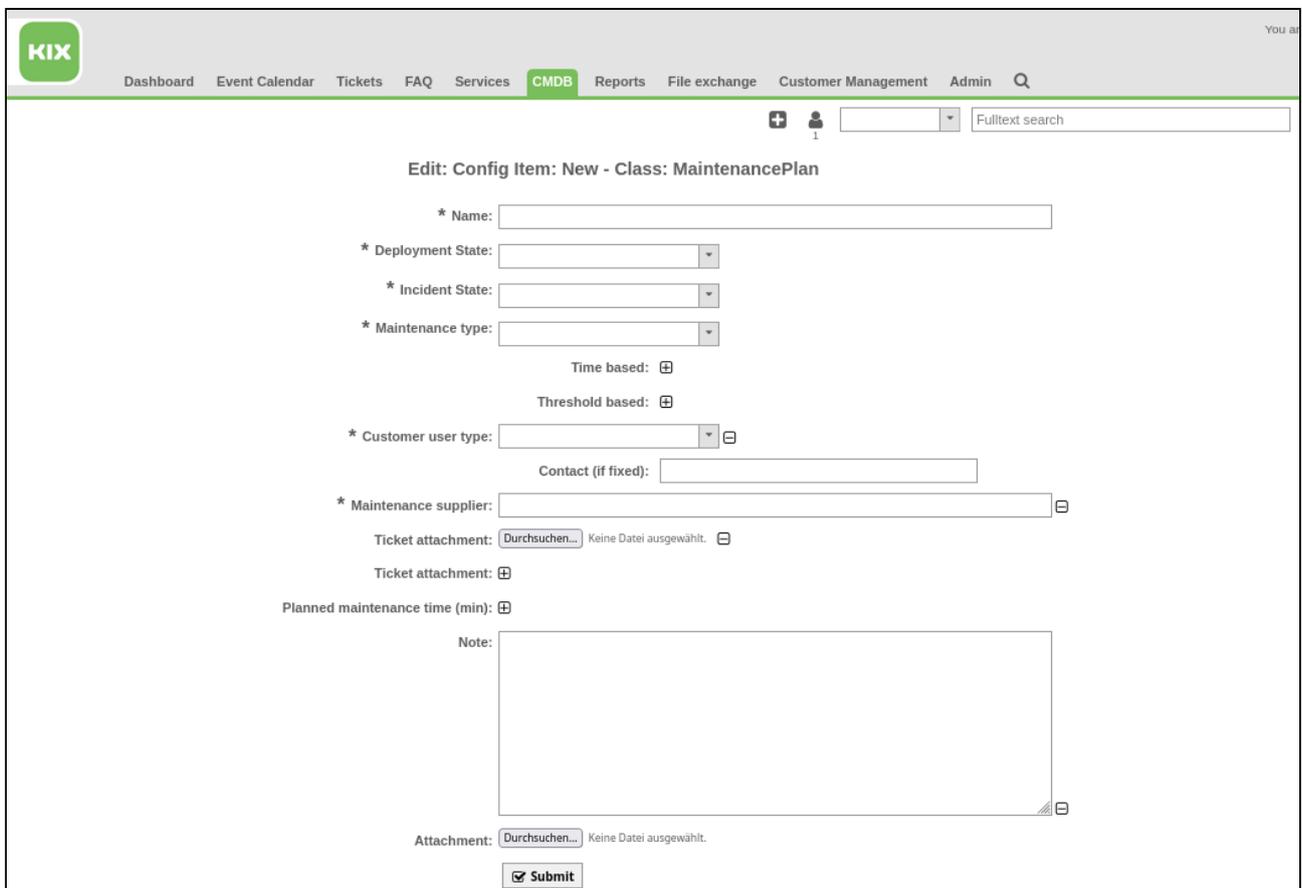
## 4.2 Creating a Maintenance Plan

From a system point of view, a maintenance plan is a ConfigItem of the ConfigItem class "Maintenance". If you want to create a new maintenance plan, you have to create a new ConfigItem from the ConfigItem class "Maintenance".

**i** In order for the ConfigItem class "Maintenance plan" to be available in your KIX, your admin must adapt the class definitions for ConfigItems accordingly.

- In the "CMDB" menu, select the "New" menu item.
- Select the "Maintenance plan" class from the list.

The dialog for editing a ConfigItem opens:



The screenshot shows the KIX web interface with the 'Edit: Config Item: New - Class: MaintenancePlan' dialog open. The interface includes a navigation bar with 'Dashboard', 'Event Calendar', 'Tickets', 'FAQ', 'Services', 'CMDB', 'Reports', 'File exchange', 'Customer Management', and 'Admin'. A search bar is also present. The form fields are as follows:

- \* Name:
- \* Deployment State:
- \* Incident State:
- \* Maintenance type:
- Time based:
- Threshold based:
- \* Customer user type:
- Contact (if fixed):
- \* Maintenance supplier:
- Ticket attachment:  Keine Datei ausgewählt.
- Ticket attachment:
- Planned maintenance time (min):
- Note:
- Attachment:  Keine Datei ausgewählt.

A 'Submit' button is located at the bottom of the form.

Fig.: Create a new ConfigItem Maintenance Plan



Fieldname	Explanation										
Name	Enter a name for the maintenance plan here.										
Deployment status	Enter a deployment status here.										
Incident status	Enter an incident status here.										
Maintenance type	<p>Select the type here.</p> <ul style="list-style-type: none"><li>• <i>For time based:</i> Select a value from the Interval drop-down menu.</li><li>• <i>At threshold based:</i></li></ul> <table border="1"><tbody><tr><td>Threshold attribute</td><td>Enter a name for the threshold attribute.</td></tr><tr><td>Next Threshold</td><td>Specify the threshold value for the attribute.</td></tr><tr><td>Next threshold value reminder (%)</td><td>Enter the percentage of the threshold value at which a maintenance ticket should be triggered.</td></tr><tr><td>Automatic threshold value increase by</td><td>Enter the value by which the specified threshold value should be increased when the threshold value has been reached.</td></tr><tr><td>Manual value for threshold value increase</td><td>Enter your own value for the threshold value increase here.</td></tr></tbody></table>	Threshold attribute	Enter a name for the threshold attribute.	Next Threshold	Specify the threshold value for the attribute.	Next threshold value reminder (%)	Enter the percentage of the threshold value at which a maintenance ticket should be triggered.	Automatic threshold value increase by	Enter the value by which the specified threshold value should be increased when the threshold value has been reached.	Manual value for threshold value increase	Enter your own value for the threshold value increase here.
Threshold attribute	Enter a name for the threshold attribute.										
Next Threshold	Specify the threshold value for the attribute.										
Next threshold value reminder (%)	Enter the percentage of the threshold value at which a maintenance ticket should be triggered.										
Automatic threshold value increase by	Enter the value by which the specified threshold value should be increased when the threshold value has been reached.										
Manual value for threshold value increase	Enter your own value for the threshold value increase here.										
Ticket template	Select a ticket template for the maintenance ticket here.										

Fieldname	Explanation
Customer user type	Select the customer user type here.  <i>Contact (if fixed):</i> If Customer user type = Fixed has been selected, you can select a contact person here who is to receive the maintenance ticket.
Maintenance supplier	Enter a contact. The contact must be created as a "customer" in the KIX system.
Ticket attachment	Here you can add an attachment for the maintenance ticket if necessary.
Planned maintenance time (min)	Here you can enter a time for maintenance.
Note	Here you can enter notes for maintenance.
Attachment	Here you can specify an attachment for the maintenance plan ConfigItem.

⚠ Fields marked with an \* must be filled out. All other entries are optional.

- Finally click on "Submit" and the maintenance plan is created.

### 4.3 Linking a Maintenance Plan with a ConfigItem

A maintenance plan is to be linked with ConfigItem to be maintained.

- Select detailed view for ConfigItem to be maintained or create a new ConfigItem.
- In detailed view, click button "Edit" .

Edit: Config Item: 17229000002 - Class: Maschine  
Cancel & close

\* Name:

\* Deployment State:

\* Incident State:

Vendor:

Model:

Description:

Type:

Owner:

Serial Number:

Warranty Expiration Date:

Install Date:

\* Note:

Assigned Cost Center:

Asset Location:

Responsible user:

\* Maintenance:

Maintenance type:

Time based:

Interval:

\* Next check date:

\* Next check date reminder:

Threshold based:

Ticket-Template:

Maintenance supplier:

Planned maintenance time (min):

\* Last maintenance date:

Maintenance note:

Maintenance:

Attachment:  Keine Datei ausgewählt.

Figure: Editing ConfigItem – Assigning Maintenance Plan

**Note**

If your form looks different from the one shown here, the class definition of the CI to be maintained must be adjusted. Contact your admin to do this.

- Enter designation of maintenance plan in "Maintenance\*" field here.
  - In the case of time-based maintenance plan:
    - Click button  .

- In "Next test", enter a date.
- In "Next test, reminder", enter a date.

The date is required so that KIX knows the start date for a cyclical, time-based maintenance.

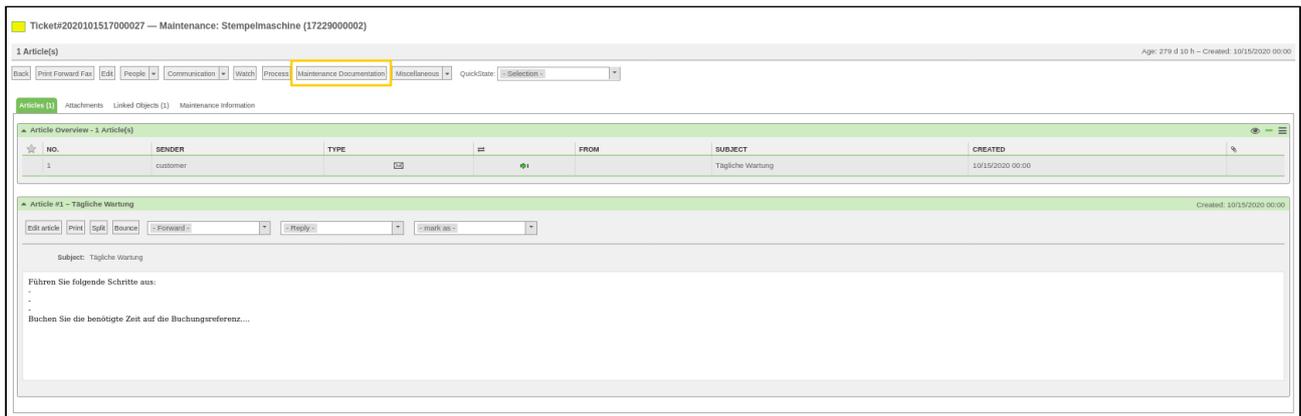
- Click the button  if you would like to add additional maintenance operations (e.g. an additional time interval or an additional threshold).
- Finally, click "Submit" button.

 **Hint**

When you create a new ConfigItem, save the maintenance plan directly when you create it.

## 4.4 Maintenance Documentation Button

In the case of tickets of the "Maintenance" type, it is possible to document the maintenance process.



When you click this button, the "Maintenance Documentation" pop-up appears.

**Maintenance Documentation — Maintenance: Stempelmaschine (17229000002)**  
All fields marked with an asterisk (\*) are mandatory.  
Cancel & close

**▲ Ticket Settings**

Next state:

**▲ Dynamic Fields**

Maintenance date:  07/21/2021

Planned maintenance start:  07/21/2021  - 11:00

Planned maintenance end:  07/21/2021  - 11:00

Actual maintenance start:  07/21/2021  - 11:00

Actual maintenance end:  07/21/2021  - 11:00

**▲ Add Article**

\* Subject: Maintenance Documentation

Text Template:

Setting a template will overwrite any text or attachment.

\* Text:

Attachment:  Keine Dateien ausgewählt.

Note type:

Time units (work units):

Figure: Pop-up maintenance documentation

## 4.5 "Maintenance Information" Tab in Ticket Zoom View

In the case of the tickets of the "Maintenance Task" type, there is the additional tab "Maintenance Information" in the ticket zoom view. If you open this tab, some information on the maintenance plan and ConfigItem to be maintained is displayed.

**Ticket#2020101517000027 — Maintenance: Stempelmaschine (17229000002)**  
2 Article(s) Age: 279 d 10 h - Created: 10/15/2020 09:00

Back Print Forward Fav Edit People Communication Watch Process Maintenance Documentation Miscellaneous Quickstart Selection

Articles (2) Attachments Linked Objects (2) **Maintenance Information**

**Basic data**

Maintenance plan Wartungsplan 1 (17229000002)	Maintenance due date 10/15/2020	Maintenance type Time based
--	------------------------------------	--------------------------------

**Device information**

Maintenance CI class maschine	Maintenance CI Stempelmaschine (17229000002)
----------------------------------	---

**Additional information**

Maintenance supplier Anton Appensiek GmbH & Co. KG
---

Figure: "Maintenance Information" Tab in Ticket Zoom View

If maintenance is carried out on a ConfigItem and you enter the values or the documentation of the maintenance, a ticket is created after the maintenance has been completed. This is then automatically linked



to the CI and the process ticket.

## 5 Security Management

The "Security Management" module offers you the following options:

- A seamless, process-based connection between an ISMS tool (information security management system) and KIX Professional.
- A mapping of the KIX CMDB (as the leading system) in an ISMS tool in order to be able to apply measures from the BSI basic protection catalog to the transferred ConfigItems.
- Record the measures to be implemented from the BSI basic protection catalog as KIX tickets
- Possibility to log the measures on the ticket
- It guarantees complete and up-to-date documentation for security audits, as recommended by the BSI (Federal Office for Information Security).
- Allocation of measures to be implemented to the IT department and synchronization of the tasks in the IT service system KIX Professional
- Central coordination and monitoring of the implementation of measures in KIX Professional including automatic status comparison with an ISMS tool

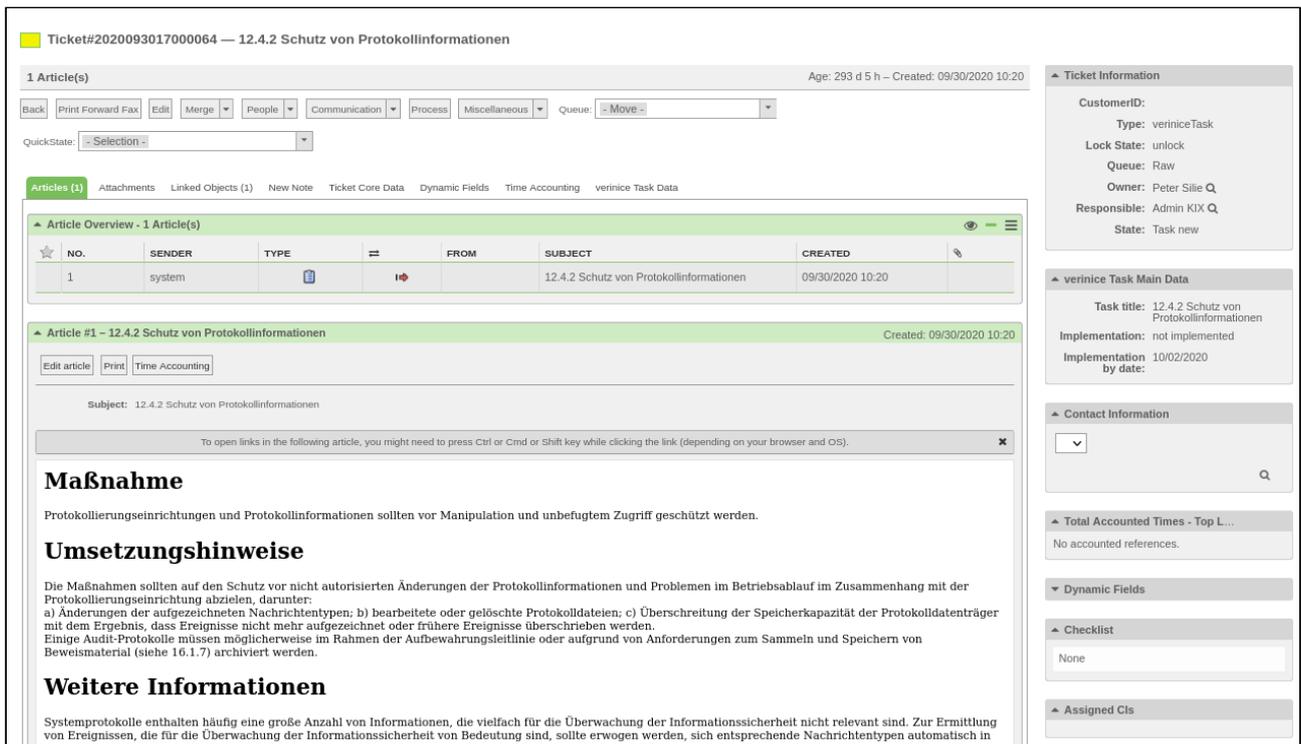
### 5.1 Security Management with verinice

With the "Security Management" module it is possible to map the KIX CMDB (as the leading system) as much as possible in verinice.PRO. The security officer who uses verinice can then apply the IT basic protection to the transferred ConfigItems. With the help of the REST interface of verinice.PRO and KIX, the measures to be implemented are then recorded as individual tickets. The article content of these tickets contains the action description text from verinice. The description texts of the measures come either from the "IT-Grundschutz-Catalog according to the Federal Office for Information Security (BSI)", from the "Modernized BSI-Grundschutz (IT-Grundschutz-Kompodium - Edition 2019)" or from the "Risk Catalog according to DIN ISO IEC 27001: 2015-03 DE. "

These tickets can then be processed by the relevant department in KIX. The implementation of the measures / modules can be logged on the ticket. This supports the process of cooperation between the two departments in the company and ensures that the tasks are properly handed over and documented. In this way, all requirements from the BSI-Grundschutz, from Information Security Management (ISM) and the Modernized BSI-Grundschutz (IT-Grundschutz Kompodium) can be met.

#### 5.1.1 Task tickets with measures / modules from verinice

If the configuration is successful, you as an agent will automatically receive task tickets from verinice.PRO. The measure to be implemented is described in the initial article of the ticket.



**Ticket#2020093017000064 — 12.4.2 Schutz von Protokollinformationen**

1 Article(s) Age: 293 d 5 h – Created: 09/30/2020 10:20

Back Print Forward Fax Edit Merge People Communication Process Miscellaneous Queue: Move QuickState: Selection

Articles (1) Attachments Linked Objects (1) New Note Ticket Core Data Dynamic Fields Time Accounting verinice Task Data

**Article Overview - 1 Article(s)**

NO.	SENDER	TYPE	FROM	SUBJECT	CREATED
1	system			12.4.2 Schutz von Protokollinformationen	09/30/2020 10:20

**Article #1 – 12.4.2 Schutz von Protokollinformationen** Created: 09/30/2020 10:20

Edit article Print Time Accounting

Subject: 12.4.2 Schutz von Protokollinformationen

To open links in the following article, you might need to press Ctrl or Cmd or Shift key while clicking the link (depending on your browser and OS).

**Maßnahme**

Protokollierungseinrichtungen und Protokollinformationen sollten vor Manipulation und unbefugtem Zugriff geschützt werden.

**Umsetzungshinweise**

Die Maßnahmen sollten auf den Schutz vor nicht autorisierten Änderungen der Protokollinformationen und Problemen im Betriebsablauf im Zusammenhang mit der Protokollierungseinrichtung abzielen, darunter:

a) Änderungen der aufgezeichneten Nachrichtentypen; b) bearbeitete oder gelöschte Protokolldateien; c) Überschreitung der Speicherkapazität der Protokollidatenträger mit dem Ergebnis, dass Ereignisse nicht mehr aufgezeichnet oder frühere Ereignisse überschrieben werden.

Einige Audit-Protokolle müssen möglicherweise im Rahmen der Aufbewahrungsleitlinie oder aufgrund von Anforderungen zum Sammeln und Speichern von Beweismaterial (siehe 16.1.7) archiviert werden.

**Weitere Informationen**

Systemprotokolle enthalten häufig eine große Anzahl von Informationen, die vielfach für die Überwachung der Informationssicherheit nicht relevant sind. Zur Ermittlung von Ereignissen, die für die Überwachung der Informationssicherheit von Bedeutung sind, sollte erwogen werden, sich entsprechende Nachrichtentypen automatisch in...

**Ticket Information**

CustomerID: veriniceTask  
Lock State: unlock  
Queue: Raw  
Owner: Peter Sillie Q  
Responsible: Admin KIX Q  
State: Task new

**verinice Task Main Data**

Task title: 12.4.2 Schutz von Protokollinformationen  
Implementation: not implemented  
Implementation by date: 10/02/2020

**Contact Information**

**Total Accounted Times - Top L...**

No accounted references.

**Dynamic Fields**

**Checklist**

None

**Assigned CIs**

Figure: Example of a task ticket generated from verinice (mail content in german)

## 5.1.2 The "verinice task main information" widget

A task ticket also has the widget "verinice task main information" in the sidebar. The "verinice task main information" widget shows the following information:

Relevant KIX-CI: Name of the ConfigItem in KIX

External CI name: Name of the ConfigItem in verinice.PRO

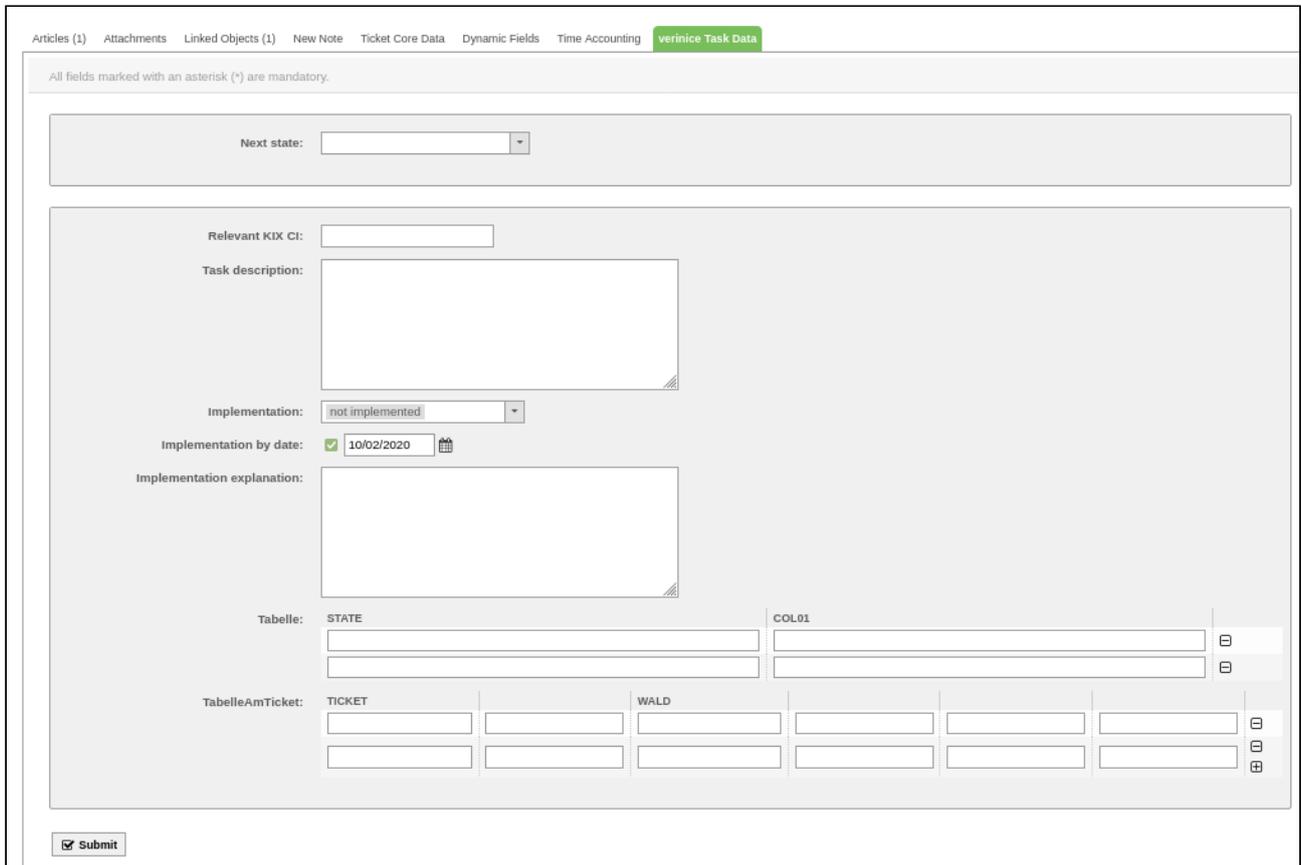
Task title: Title of the measure to be implemented from the underlying catalog

Task chapter: Chapter name of the measure from the underlying catalog

Implementation by: Date by which the measure is to be implemented

### 5.1.3 "Verinice task information" tab

For tickets of the type "veriniceTask" there is a new tab "verinice task information" in the ticket detail view:



Articles (1) Attachments Linked Objects (1) New Note Ticket Core Data Dynamic Fields Time Accounting **verinice Task Data**

All fields marked with an asterisk (\*) are mandatory.

Next state:

Relevant KIX CI:

Task description:

Implementation:

Implementation by date:  10/02/2020

Implementation explanation:

Tabelle:

STATE	COL01
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

TabelleAmTicket:

TICKET	WALD
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Submit

Fig.: "verinice task information" tab

Here you can choose the implementation status of the measure and the next status of the ticket. By default, the ticket status "Task implementation accepted" is used to transfer the action attributes (e.g. "Implementation by") to verinice.PRO. Every change of status triggers a feedback to verinice.PRO.

The status "Task assigned" shows in verinice.PRO that the measure has been started in the KIX. The status "Task implementation accepted" in verinice.PRO marks the end or completion of processing in the KIX. These two ticket statuses are the only ones that have an effect on the "KIX workflow status" of the measure in verinice.PRO.

## 5.1.4 Synchronization

Two requirements must be met so that ConfigItems can be synchronized. They must belong to a ConfigItem class configured in the SysConfig and the attribute "Synchronization with verinice" must be set to "yes". For more information on configuration, see the KIX Admin Manual.

The new sub-item "verinice Sync" is available in the "CMDB" menu:

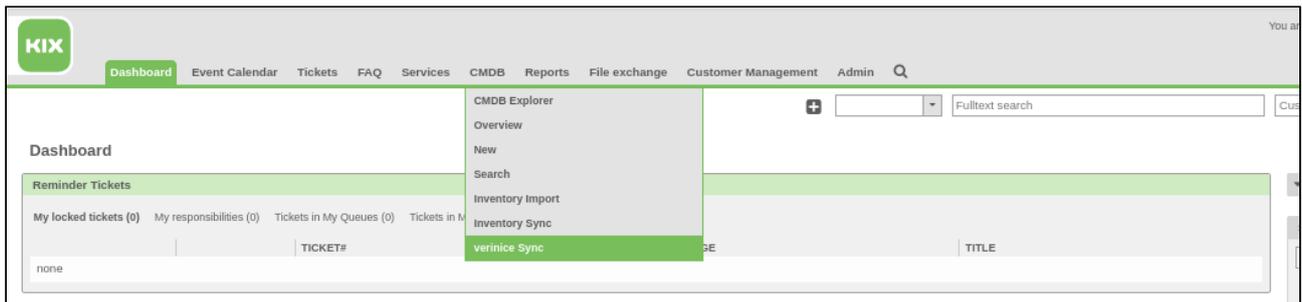


Fig.: CMDB module, selection menu

After selecting the menu item, a widget "Synchronization with verinice" appears:



(mail content in german)

Fig.: Overview of the CIs to be synchronized

The widget shows all configured ConfigItem classes, the associated backends and the number of ConfigItems to be synchronized. To synchronize, click the "Synchronize" button.

After synchronization, a small window appears with the result of how many ConfigItem were created or changed in verinice.PRO:

Any errors are also displayed with a reference to the KIX error log.

In the verinice.PRO client, the ConfigItems then only have to be moved from the "imported objects" to the relevant object category using "cut" and "paste".

### **Note**

The number of objects created or updated does not have to match the total number in the overview of the Config Items. This number may be multiplied by the number of active backends.

## 5.1.5 verinice create task tickets

In order for tickets to be created, the synchronized ConfigItems "modules" or "measures" from the "IT-Grundschatz", the "Risk Catalog" or the "IT-Grundschatz Compendium" must be assigned or linked in the verinice.PRO client. For the measures contained in the modules, the attribute "KIX Workflow Status" must then be set to "Start workflow".

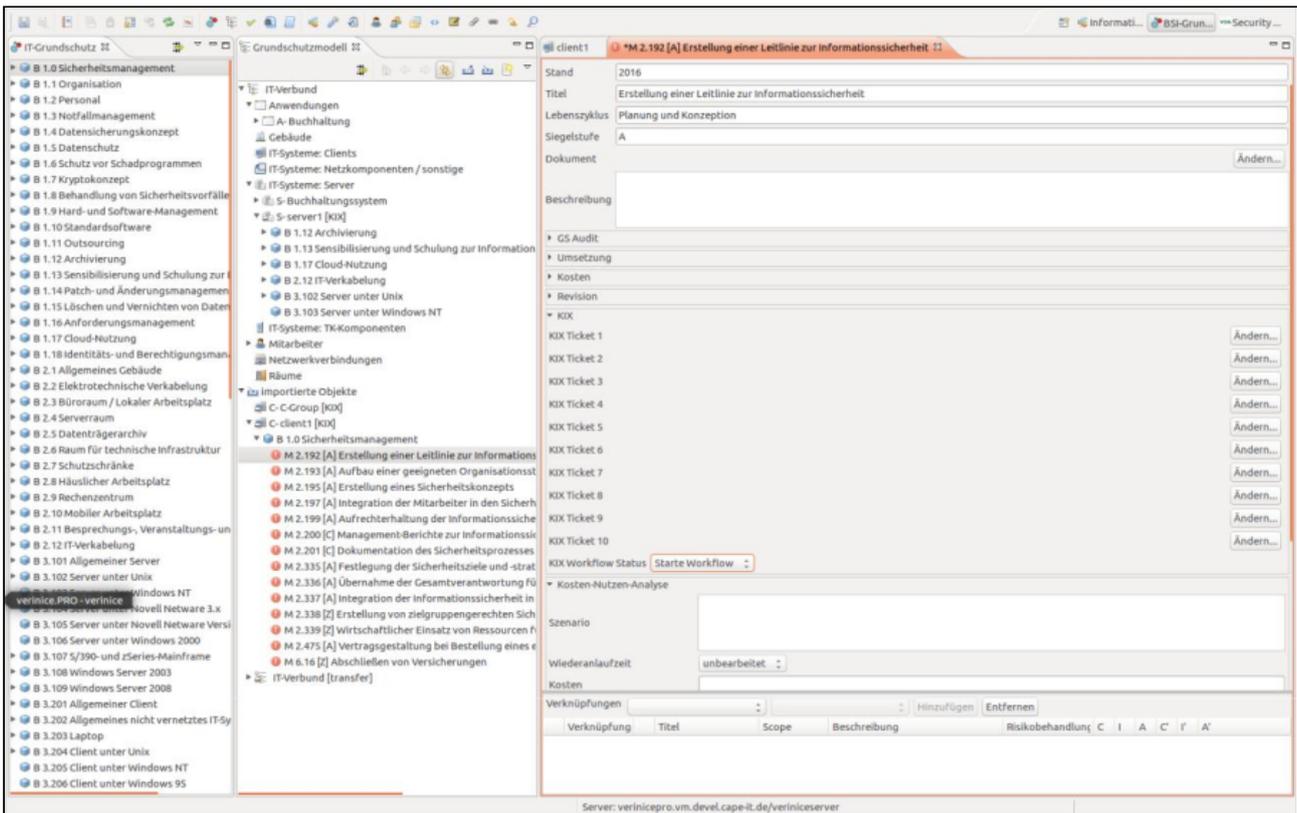
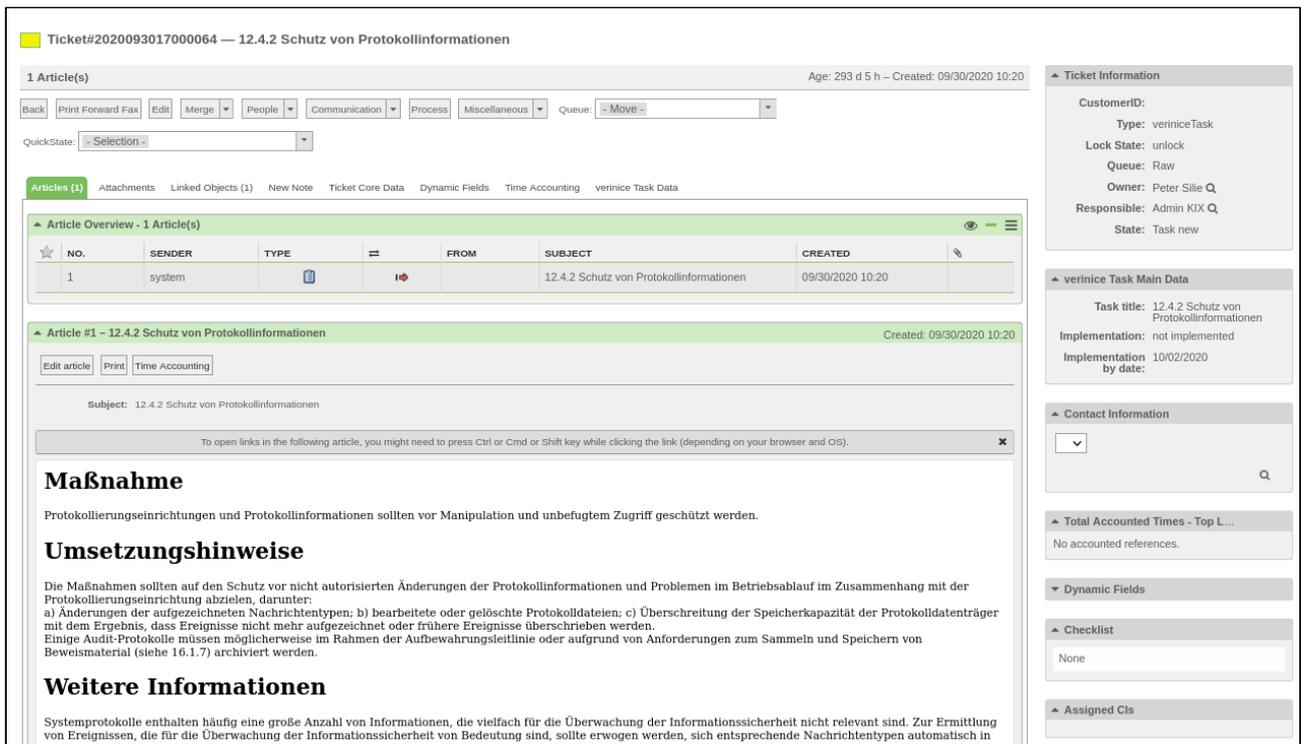


Fig.: View of a measure in verinice.PRO (content in german)

In KIX, the scheduler asks every 5 minutes whether measures or modules with a started KIX workflow exist in verinice.PRO. If there are corresponding measures or modules, a new verinice task ticket is created for each measure or an existing ticket for this measure implementation is updated. This only takes place as long as the "KIX workflow status" of the measure is in the "Start workflow" status. Alternatively, the CLI module "Maint :: Ticket :: CheckForTasks" used in the scheduler can be executed manually via a terminal. More on this in the administration manual.



**Ticket#2020093017000064 — 12.4.2 Schutz von Protokollinformationen**

1 Article(s) Age: 293 d 5 h – Created: 09/30/2020 10:20

Back Print Forward Fax Edit Merge People Communication Process Miscellaneous Queue: Move QuickState: Selection

Articles (1) Attachments Linked Objects (1) New Note Ticket Core Data Dynamic Fields Time Accounting verinice Task Data

**Article Overview - 1 Article(s)**

NO.	SENDER	TYPE	FROM	SUBJECT	CREATED
1	system			12.4.2 Schutz von Protokollinformationen	09/30/2020 10:20

**Article #1 – 12.4.2 Schutz von Protokollinformationen** Created: 09/30/2020 10:20

Edit article Print Time Accounting

Subject: 12.4.2 Schutz von Protokollinformationen

To open links in the following article, you might need to press Ctrl or Cmd or Shift key while clicking the link (depending on your browser and OS).

**Maßnahme**

Protokollierungseinrichtungen und Protokollinformationen sollten vor Manipulation und unbefugtem Zugriff geschützt werden.

**Umsetzungshinweise**

Die Maßnahmen sollten auf den Schutz vor nicht autorisierten Änderungen der Protokollinformationen und Problemen im Betriebsablauf im Zusammenhang mit der Protokollierungseinrichtung abzielen, darunter:

a) Änderungen der aufgezeichneten Nachrichtentypen; b) bearbeitete oder gelöschte Protokolldateien; c) Überschreitung der Speicherkapazität der Protokollidenträger mit dem Ergebnis, dass Ereignisse nicht mehr aufgezeichnet oder frühere Ereignisse überschrieben werden.

Einige Audit-Protokolle müssen möglicherweise im Rahmen der Aufbewahrungsleitlinie oder aufgrund von Anforderungen zum Sammeln und Speichern von Beweismaterial (siehe 16.1.7) archiviert werden.

**Weitere Informationen**

Systemprotokolle enthalten häufig eine große Anzahl von Informationen, die vielfach für die Überwachung der Informationssicherheit nicht relevant sind. Zur Ermittlung von Ereignissen, die für die Überwachung der Informationssicherheit von Bedeutung sind, sollte erwogen werden, sich entsprechende Nachrichtentypen automatisch in

**Ticket Information**

CustomerID: Type: veriniceTask  
Lock State: unlock  
Queue: Raw  
Owner: Peter Sillie Q  
Responsible: Admin KIX Q  
State: Task new

**verinice Task Main Data**

Task title: 12.4.2 Schutz von Protokollinformationen  
Implementation: not implemented  
Implementation by date: 10/02/2020

**Contact Information**

**Total Accounted Times - Top L...**

No accounted references.

**Dynamic Fields**

**Checklist**

None

**Assigned CIs**

Fig.: Example of a task ticket generated from verinice.PRO (mail content in german)

When the ticket is created, the next free "KIXTicket X" attribute is filled with the link to the ticket and the relevant ticket number. In this way, verinice.PRO also provides a reference to the respective ticket.

## 5.1.6 Transfer links of config items to verinice.PRO

Links between config items in KIX can be transferred to verinice.PRO. To do this, the corresponding classes and the relevant link types must be stored in the SysConfig (see admin manual)

Links from KIX then appear in the verinice.PRO client under the "Links" tab.

## 6 Telefonintegration (CTI)

The KIX module "Telephone Integration" integrates handling for incoming and outgoing phone calls. Agents can therefore quickly identify who is ringing the service hotline.

Corresponding customer details are shown in the ticket form in the event of incoming calls on an agent's phone. The agent can also contact the customer directly from KIX Professional while processing the ticket by simply clicking the telephone number.

### 6.1 The CTI Manager

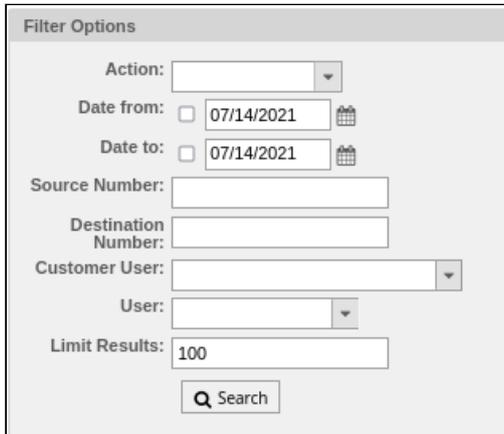
In the CTI manager interface, authorized employees can view which tickets were related with which telephone calls or whether there may have been terminated calls due to too long waiting times for the hotline.

CTI Activity		List				
Filter Options		DATUM	ACTION	SOURCE NUMBER	DESTINATION NUMBER	CUSTOMER USER
Action:	<input type="text"/>	07/14/2020 12:09		0049963852741	00493715347642	Christopher Wolstenholme (Musterpost GmbH)
Date from:	<input type="text" value="07/14/2021"/>	07/14/2020 13:58		00493715347642	0049963852741	Christopher Wolstenholme (Musterpost GmbH)
Date to:	<input type="text" value="07/14/2021"/>	07/27/2020 08:01		0049963852741	00493715347642	Christopher Wolstenholme (Musterpost GmbH)
Source Number:	<input type="text"/>	07/27/2020 08:01		0049963852741	00493715347642	Christopher Wolstenholme (Musterpost GmbH)
Destination Number:	<input type="text"/>	07/27/2020 08:01		0049963852741	00493715347642	Christopher Wolstenholme (Musterpost GmbH)
Customer User:	<input type="text"/>	07/27/2020 08:01		0049963852741	00493715347642	Christopher Wolstenholme (Musterpost GmbH)
User:	<input type="text"/>	07/27/2020 08:01		0049963852741	00493715347642	Christopher Wolstenholme (Musterpost GmbH)
Limit Results:	<input type="text" value="100"/>	07/29/2020 08:17		0049963852741	00493715347642	Christopher Wolstenholme (Musterpost GmbH)
<input type="button" value="Search"/>		07/29/2020 08:17		0049963852741	00493715347642	Christopher Wolstenholme (Musterpost GmbH)
		07/29/2020 09:11		0049963852741	00493715347642	Christopher Wolstenholme (Musterpost GmbH)
		07/29/2020 09:44		00493715347642	00493430141401	Karl Ritter (c.o.o. IT GmbH)

Figure: CTI Activity

	Outgoing
	Incoming
	Connected
	Missed

In the left area in "Filter options" widget, you can filter the output in the list.



Filter Options

Action:

Date from:  07/14/2021 

Date to:  07/14/2021 

Source Number:

Destination Number:

Customer User:

User:

Limit Results:

Figure: "Filter options" Widget

## 6.2 Incoming call

When there is an incoming call, a pop-up opens with the phone number of the caller. You answer the call.

If the data of the caller is stored, you can open his contact information. If there is already a process (in the form of a ticket) relating to the caller's request, open it to process the call.





Attachment	If necessary, you can store an attachment.
Next status of the ticket	Select the next status of the ticket using the drop-down menu.
Degree of completion	If necessary, enter the degree of completion of the processed request.
Time units (work units)	Enter the time required for this call.

Fields marked with an \* must be filled out. All other entries are optional.

- Finally, click on "Submit" to save the entry.

## 6.3 Outgoing call

To call a contact, click on the phone number stored in the contact information.

## 7 Time Accounting

- "Time Accounting" tab in the ticket zoom view (see page 57)
  - "Total Accounted Times" widget in sidebar of ticket zoom view (see page 58)
- Adding a Time Input for a Ticket (see page 58)
  - "Time Accounting" Button in Article View (see page 59)
  - Adding a Time Input for an Article (see page 60)
  - "Total Accounted Times" widget in Customer Information Center (see page 60)
  - "Accounted Tickets" ConfigItem Action (see page 61)
- Creating an Accounting Reference for Time Recording (see page 61)

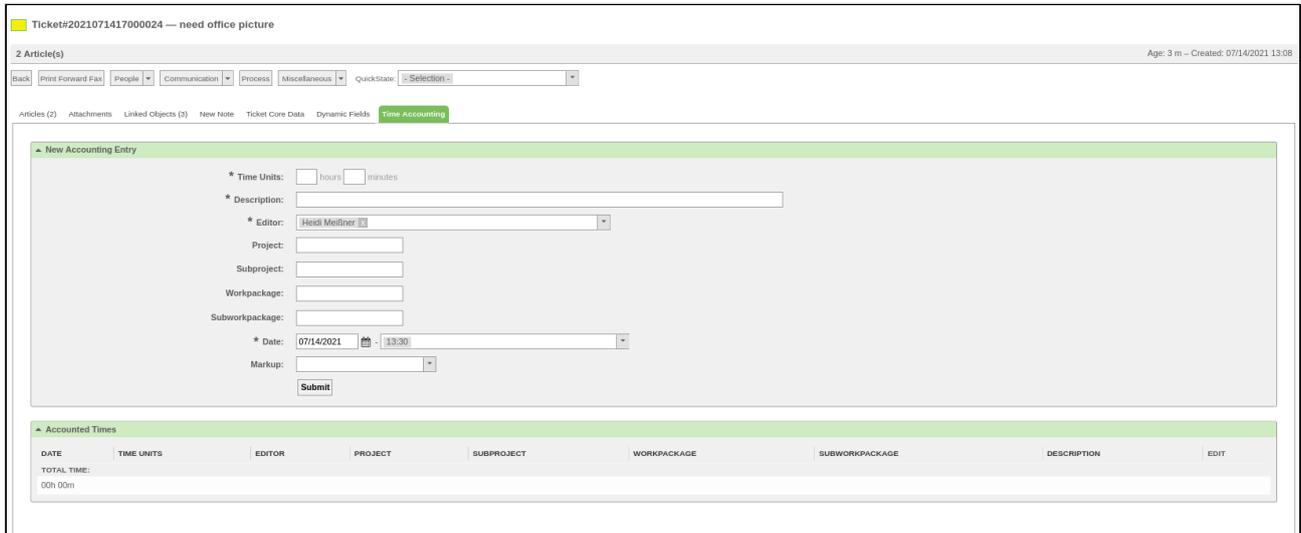
With the "Time Recording" module, you can log all work time incurred in the course of a service during ticket creation directly on an accounting reference configured for this purpose. These accounting references are mapped via defined ConfigItems which are assigned to special CI classes. For example, the CI classes "Project" or "Workpackage", which are pre-configured in the factory settings, are suitable for this purpose. If required, you can also log accounting references on other CI classes.

The "Time Recording" module provides:

- Ticket zoom view: additional "Time Accounting" tab.
- Ticket zoom view: "Total Accounted Times" widget in the sidebar
- "Time Accounting" article action
- "Overview": module "Accounted Times" additional widget
- "Accounted Tickets" ConfigItem action
- Customer Information Center: "Total Accounted Times" additional widget

### 7.1 "Time Accounting" tab in the ticket zoom view

There is an additional "Time Accounting" tab in the ticket zoom view. You have the option here to record times and, if necessary, log the recorded times on an accounting reference (e.g. a project). In addition, you can subsequently edit times that have already been logged in the "Accounted Times" widget.



Ticket#2021071417000024 — need office picture

2 Article(s) Age: 3 m — Created: 07/14/2021 13:08

Back Print Forward Fax People Communication Process Miscellaneous QuickState Selection

Articles (2) Attachments Linked Objects (2) New Note Ticket Core Data Dynamic Fields **Time Accounting**

**New Accounting Entry**

\* Time Units:  hours  minutes

\* Description:

\* Editor:

Project:

Subproject:

Workpackage:

Subworkpackage:

\* Date:

Markup:

**Accounted Times**

DATE	TIME UNITS	EDITOR	PROJECT	SUBPROJECT	WORKPACKAGE	SUBWORKPACKAGE	DESCRIPTION	EDIT
TOTAL TIME:								
00h 00m								

Figure: Ticket Zoom View with Time Accounting Tab

### 7.1.1 "Total Accounted Times" widget in sidebar of ticket zoom view

The "Total Accounted Times" widget shows all times recorded on the ticket that are assigned to an accounting reference (e.g. a project). Times recorded on the ticket that are not assigned to an accounting reference are not shown in the widget.

The number in "Accounted" is the total of all time logged on this accounting reference from ALL tickets. The number in "Planned" represents the CI attribute "Planned outlay". The attribute can be defined for an accounting reference when creating a ConfigItem.

The number in "Available" is the difference resulting from "Planned-Accounted". If the number value is negative, the row is marked red.

## 7.2 Adding a Time Input for a Ticket

- Select the ticket for which you want to add a time input.
- Click "Time Accounting" tab in the ticket zoom view."
- New Accounting Entry" widget appears:

Time Units: enter the time in hours and minutes here.

Description: enter a description for the time input here.

Editor: select the editor for this article/work step here.

Project: if necessary, select a project as an accounting reference here.

Subproject: if necessary, select a sub-project as an accounting reference.

Workpackage: if necessary, select a work package as an accounting reference here.

Subworkpackage: if necessary, select a sub-work package as an accounting reference.

Date: select a date and time for the time input here.

Markup: select a markup here (e.g. additional charge/additional work/traveling time) for the time input.

- Finally, click "Submit" button.

The time input is saved and, if necessary, added to existing time inputs. The added time input is now visible in "Accounted Times" widget together with other times logged on this ticket. You have the option of editing time inputs subsequently here.

DATE	TIME UNITS	EDITOR	PROJECT	SUBPROJECT	WORKPACKAGE	SUBWORKPACKAGE	DESCRIPTION	EDIT
2021-07-15	00h 30m	Heidi Meißner	-	-	-	-	Step 2	Edit
2021-07-14	01h 00m	Heidi Meißner	-	-	-	-	Step 1	Edit
TOTAL TIME:								
01h 30m								

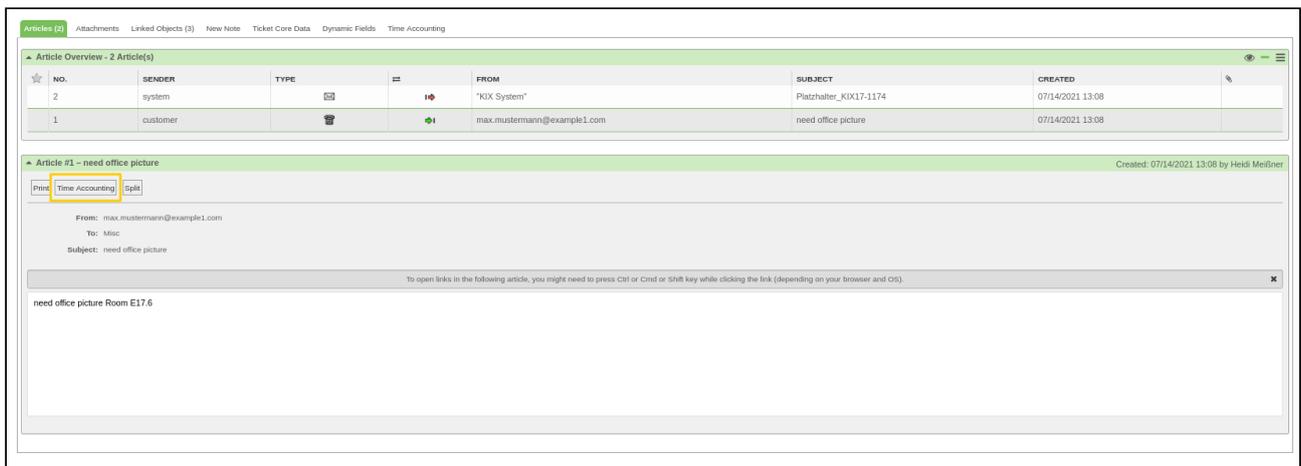
Figure: "Accounted Times" Widget

- Click in "Edit" field of the relevant time input to edit a time input.

## 7.2.1 "Time Accounting" Button in Article View

"Time Accounting" button in article view offers you the option of creating a time input and accounting reference for this article.

Time inputs for multiple articles with the same accounting reference (e.g. the same project) are automatically added up by KIX.



The screenshot shows the KIX interface with a menu bar at the top containing 'Articles (2)', 'Attachments', 'Linked Objects (3)', 'New Note', 'Ticket Core Data', 'Dynamic Fields', and 'Time Accounting'. Below the menu is an 'Article Overview - 2 Article(s)' table with columns for NO., SENDER, TYPE, FROM, SUBJECT, and CREATED. The table lists two articles: one from 'system' and one from 'customer'. Below the table, the details for 'Article #1 - need office picture' are shown, including a 'Time Accounting' button highlighted with a red box. The article content includes a header with 'From: max.muellermann@example1.com', 'To: MSc', and 'Subject: need office picture'. A message at the bottom states: 'To open links in the following article, you might need to press Ctrl or Cmd or Shift key while clicking the link (depending on your browser and OS)'. The article body contains the text 'need office picture Room E17.6'.

Figure: Article View with Additional Button for Time Accounting

## 7.2.2 Adding a Time Input for an Article

- In article view, click button "Time Accounting" .
- A pop-up for editing the time input opens.

All fields marked with an asterisk (\*) are mandatory.

Cancel & close

**▲ Add New Accounting Entry**

\* Date:  -

\* Time Units:  hours  minutes

\* Editor:

Project:

Subproject:

Workpackage:

Subworkpackage:

Markup:

\* Description:

Add

**▲ Accounted Times On this Article**

DATE	TIME UNITS	EDITOR	PROJECT	SUBPROJECT	WORKPACKAGE	SUBWORKPACKAGE	MARKUP	DESCRIPTION	SUBJECT
TOTAL TIME:									
00h 00m									

Figure: "Add time entry" Pop-Up

The time input is saved and added to time inputs that may already exist for this article.

## 7.2.3 "Total Accounted Times" widget in Customer Information Center

The "Total Accounted Times" widget in the customer information center shows all recorded times for a CI linked to the customer.

The number in "Accounted" is the total of all time logged on this accounting reference from ALL tickets. The number in "Planned" represents the CI attribute "Planned outlay". The attribute can be defined for an

accounting reference when creating a ConfigItem.

The number in "Available" is the difference resulting from "Planned-Accounted". If the number value is negative, the row is marked red.

## 7.2.4 "Accounted Tickets" ConfigItem Action

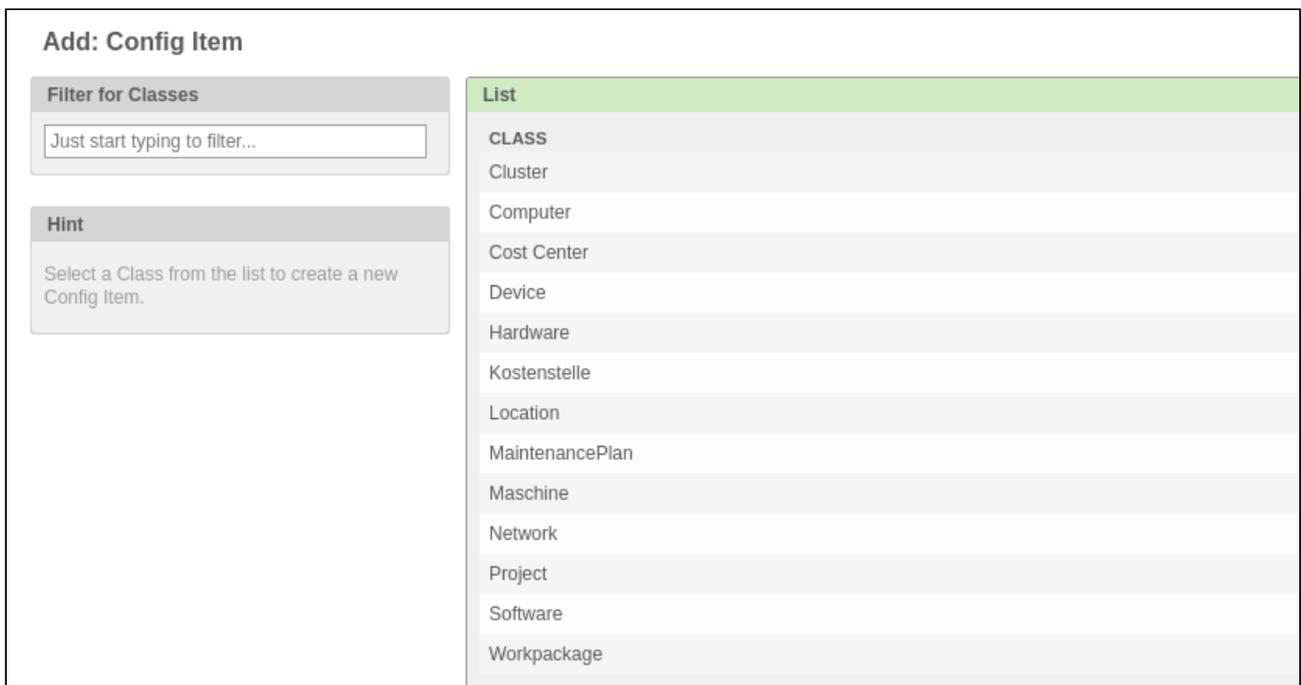
"Accounted Tickets" ConfigItem action is displayed with CIs of the class "Project" or "Workpackage".

A pop-up opens if you click button "Accounted Tickets". In the pop-up, all tickets linked to the ConfigItem (accounting reference) are shown in "Accounted Tickets" widget. In "Linked Tickets (Rework)" widget, all tickets are shown that are linked with the ConfigItem (accounting reference) via the link type "Rework for". These are time inputs that are logged on another accounting reference (another cost center or another project). The link types "Rework for" (Ticket -> ConfigItem) and "Rework" (ConfigItem -> Ticket) are used for the figure.

## 7.3 Creating an Accounting Reference for Time Recording

In the following example, an accounting reference is written onto the ConfigItem class "Project":

- In "CMDB" menu, click menu item "New"
- A widget with a list of ConfigItem classes opens:



**Add: Config Item**

**Filter for Classes**

List
CLASS
Cluster
Computer
Cost Center
Device
Hardware
Kostenstelle
Location
MaintenancePlan
Maschine
Network
Project
Software
Workpackage

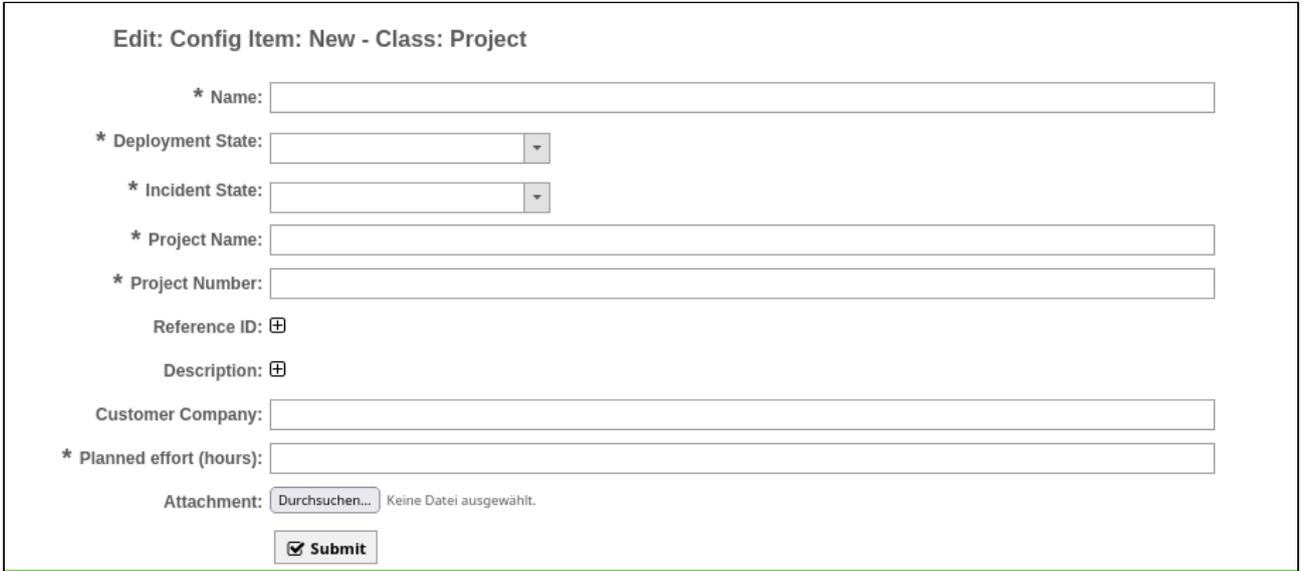
**Hint**

Select a Class from the list to create a new Config Item.

Figure: CI Class Selection

- In the list, select "Project" ConfigItem class.

- An input screen to enable you to edit a new ConfigItem of the ConfigItem class "Project" opens:



**Edit: Config Item: New - Class: Project**

\* Name:

\* Deployment State:

\* Incident State:

\* Project Name:

\* Project Number:

Reference ID:

Description:

Customer Company:

\* Planned effort (hours):

Attachment:  Keine Datei ausgewählt.

*Figure: Editing CI Class*

- Fill out the inputs fields or select a value from the drop-down menus.
- Finally, click "Submit" button.

In the future, working times can be booked on the created project.

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  - the central documentation of all activities and changes in the IT such as due to executed maintenance activities or other service activities (e.g. medical device log book);
  - for compiling a knowledge database.
- for automating and simplifying general management processes, such as:
  - in service and technical customer service, for example in IT service (errors, changes, maintenance);
  - in building services (errors, changes, cleaning) or medical device technology.
- for monitoring purposes and calendar functions, such as:
  - for central IT services (network, email, data servers, SAP,...);
  - and for error and requirement notifications for the IT team, building services, medical device technology;
  - for the planning of regular maintenance works and reminders for replacing wear parts;
  - for the organisation of regular orders and planning the deployment of service technicians.

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