

KIX Field Agent Manual

KIX Field Agent – EN

Issued on: 12.02.2024





Table of contents

1	Manual	2
1.1	Tooltip: Login	2
1.2	Introduction	4
1.3	Requirements	5
1.3.1	Update Notice	5
1.4	Use	6
1.4.1	Basics for Use	7
1.4.1.1	Prerequisites	7
1.4.1.2	Login	8
1.4.1.3	Required Permissions	9
1.4.1.4	Synchronisation	9
1.4.1.5	Ticket Overview	9
1.4.1.6	Asset Overview	11
1.4.1.7	Settings	13
1.4.2	Example Use Case	15
1.4.3	Tickets	16
1.4.3.1	Ticket Creation	16
1.4.3.2	Ticket Processing	18
1.4.4	Assets	30
1.4.4.1	Zoom View	30
1.5	Administration	32
1.5.1	Required authorisations	32
1.5.2	Updating of geo-position data	32
1.5.3	Tickets	33
1.5.3.1	Team assignment when creating a ticket	33
1.5.3.2	Form data / Available dynamic fields	33
1.5.4	Make time recording optional	35
1.6	Liability Disclaimer for KIX Field Agent App	36
1.6.1	Liability for Contents	36
1.6.2	Liability for Links	36
1.6.3	Copyright	37
1.7	Purpose for which the use of KIX Field Agent App is intended within a medical context	38





1 Manual

1.1 Tooltip: Login

Ensure that your device is connected to the Internet. Now open the Field Service App. The login page initially appears:

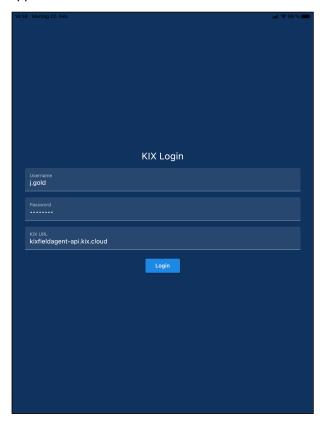


Fig.: Login Page of KIX Field Agent App



Issued on: 12.02.2024



▲ Important

Enter your details and click "Login".

,			
User name	Your KIX user name		
Password	Your KIX password		
KIX URL	The server entered for use with KIX-Cloud is " <nameofcloudstack>-api.kix.cloud", i.e. "t123456678- api.kix.cloud". If KIX is used OnPremises, it must be possible to reach the backend API interface of the system from the mobile device via HTTPS. For further information, please contact your administrator.</nameofcloudstack>		

1 After an incorrect login, all app data can be reset by clicking the reset button in the error message. This also includes the remembered server URL.



Issued on: 12.02.2024

Page 3



1.2 Introduction

This manual is intended for users of the KIX Field Agent App.

With the KIX Field Agent App, you can process tickets that have been assigned to you by your KIX 18 Service Management System. After logging in and synchronisation, the processing of tickets is also possible offline. Information linked to the ticket, such as asset / configuration items, FAQ articles or the communication / case history of the ticket, can also be used offline.

Further manuals and information on KIX can be found at:

- KIX 18: https://www.kixdesk.com/en
- KIX 18 User Manual (KIX Start and Pro): https://docs.kixdesk.com/display/ K18UserManualENCommunity
- KIX 18 Admin Manual (KIX Start and Pro): https://docs.kixdesk.com/display/ K18AdminManualENCommunity
- KIX 18 manual for the Self Service Portal: https://docs.kixdesk.com/display/ KIX18SelfServicePortalENCommunity

Help and Contact

We hope that this manual will provide you with sufficient assistance in using the KIX Field Agent App. If you still have questions, please ask them in our forum: https://forum.kixdesk.com. There you will also find a range of information that may help you to answer your questions.

Alternatively, you can conclude a service contract with c.a.p.e. IT GmbH and thus make use of our competent support. Please contact us by e-mail or telephone.

E-mail: info@kixdesk.com¹

• Telephone: +49 3 71/2 70 95-620







1.3 Requirements

To use KIX Field Agent, you need an up-to-date installation of KIX Start, KIX Pro (both from version 18), or a KIX Cloud environment. The mobile device must be able to reach the KIX backend via HTTPS.

The app is compatible with mobile devices with the following operating systems:

- · Android as from version 8.x
- · iOS as from version 13.x

The app can be installed from the App Store:

- Apple App Store²
- Google Play Store³

1.3.1 Update Notice

To avoid problems with downloaded information, the app's local data or the app itself should be removed before installing the respectively new version.

² https://apps.apple.com/de/app/kix-field-agent/id1489588005 3 https://play.google.com/store/apps/details?id=com.compl3te.fieldservices





1.4 Use

The KIX Field Agent App enables service technicians and field staff to process assigned tickets offline in your KIX Service Management System.

All available information, such as asset and device data, knowledge database entries or the communication history of the process is also available offline on the ticket.

The app includes the following functions and options:

- · Ticketing / Order processing
 - · Offline capability
 - · Reject/accept processing
 - Checklists
 - · Add pictures to notes
 - · Automatic time tracking
 - · Order completion with signature
 - · Work reports for your customers and internal use
 - · Search in assigned tickets
 - · Notification for ticket reminders
 - · Grouping by plan data and priority
- · Access to device and system information in the database via QR code
- · Offline access to knowledge base articles of your tickets
- Offline access to customer and contact information of your tickets
- View and navigate to customer addresses using your navigation app
- · Send emails regarding their tickets from mobile
- · GPS position report to backend for further deployment planning



Issued on: 12.02.2024

Page 6



1.4.1 Basics for Use

- Prerequisites (see page 7)
- Login (see page 8)
- Required Permissions (see page 9)
- Synchronisation (see page 9)
- Ticket Overview (see page 9)
- Asset Overview (see page 11)
- Settings (see page 13)

1.4.1.1 Prerequisites

As mobile devices are assigned different IP addresses during use, SysConfig setting "TokenCheckRemoteIP" should be set to 0 in the KIX agent portal.





1.4.1.2 Login

Ensure that your device is connected to the Internet. Now open the Field Service App. The login page initially appears:

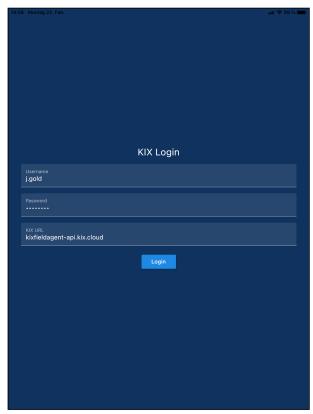


Fig.: Login Page of KIX Field Agent App



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Important

Enter your details and click "Login".

Form field	Explanation
User name	Your KIX user name
Password	Your KIX password
KIX URL	The server entered for use with KIX-Cloud is " <nameofcloudstack>-api.kix.cloud", i.e. "t123456678-api.kix.cloud". If KIX is used OnPremises, it must be possible to reach the backend API interface of the system from the mobile device via HTTPS. For further information, please contact your administrator.</nameofcloudstack>

1.4.1.3 Required Permissions

To use the app, the user must have full permissions to the assigned tickets (Create, Read, Update, Delete) and read access to assets and assigned FAQ entries and FAQ categories. This can be achieved by granting the default roles "Ticket Agent", "FAQ Reader" and "Asset Reader". Customized or more selective permissions may result in permission errors and deny access to asset or FAQ details. An error "403" then appears in the app.

1.4.1.4 Synchronisation

After registration, the app is automatically synchronized with the KIX Service Management System. The app can then also be used offline.

The synchronization can also be triggered manually at any time via the app ("Update tickets" option).

1.4.1.5 Ticket Overview

After you have logged in, the ticket overview opens. Here you can see a list of all the tickets which you are the owner of. If you pull the list down, it is updated.



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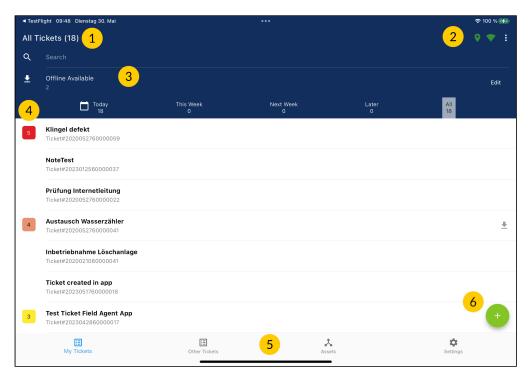
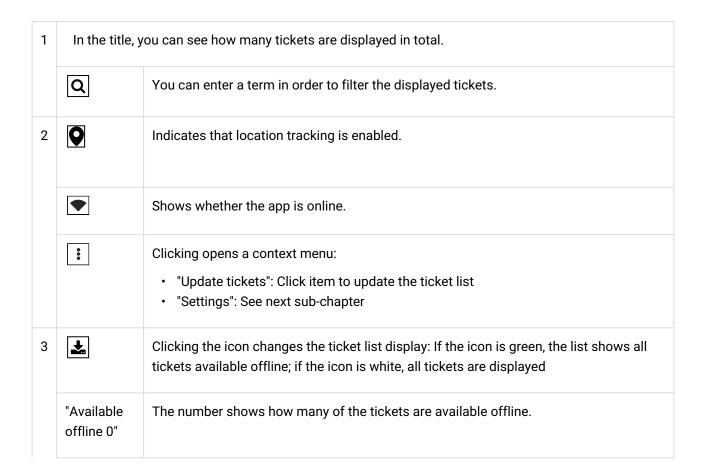


Fig.: Start page of the app: your ticket overview







	"Edit"	Clicking "Edit" enables you to select tickets for offline availability: Place a check next to the tickets that you want to make available offline. Click "Bestätigen (Confirm)" to download the selected tickets.				
4	The tickets a icon is only s	re shown sorted according to priority. If several tickets are present for one priority, the nown once.				
5	"My Tickets"					
	"Other Tickets" By clicking, you will get to the overview of unlocked tickets of other users with team. To do this, first select the team whose tickets you would like to see usin filter function.					
		Taking over unlocked tickets of other users from "My Teams" is possible by clicking to open the ticket from the list and then clicking on "Pull Task". This causes: Setting the editor to the "pull"-ending user Set the ticket lock Set the dynamic field "MobileProcessingState" to "assigned"				
		The ticket will then be available in the list "My tickets".				
	"Assets"	Clicking takes you to the asset overview.				
	"Settings"	Clicking takes you to the personal settings of the app. (see next chapter)				
6	Plus Button	By clicking the button you open the form for creating a new ticket.				

1.4.1.6 Asset Overview

After clicking the "Assets" button at the bottom of the screen, the asset overview opens. This is initially empty. You can use the search function to display assets.





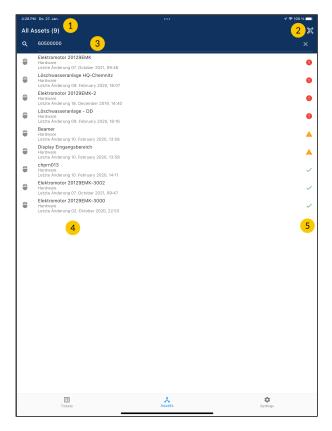
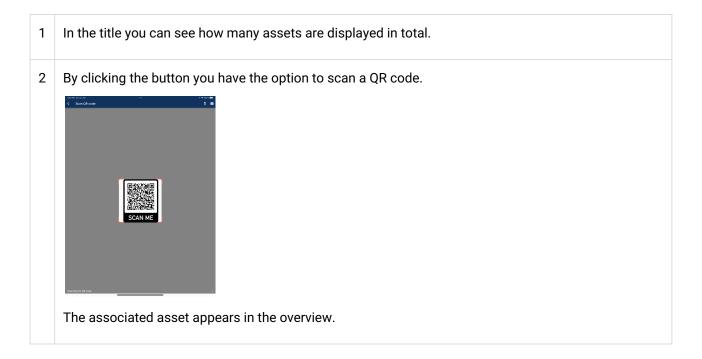


Fig.: Your asset overview







3	You can search specifically for an asset by entering its number (or part of the number). • Attention: Entering only a few digits can lead to longer loading times, since all assets are checked accordingly.
4	Here you can see the hit list of your search.
5	The icons indicate the status of the respective asset. Incident (red), Warning (orange), Productive (green).

1.4.1.7 Settings

In the top right of the screen, click to access the settings page. You can use the arrow on the top left to return to the ticket overview. The following setting options and information are available to you here:

General		
About	Shows the version of the app that you have installed.	
Delete data	Click the line to delete all locally saved tickets and attachments from your device.	
Analytics	If this item is activated, your device type and operating system are reported to KIX Service Software GmbH.	
Location Tracking	When this feature is enabled, the app transmits the agent's location to KIX.	
KIX		
Stop automatically	Configure the number of hours after which time recording should be stopped automatically, in case you should forget to end this on the ticket manually. Possible values: Complete hours between 1 and 12.	
KIX URL	Here you can change the URL that you entered during login.	
KIX customer number	Enter your KIX customer number. (Does not impact how the app works)	





Log off

Click here to permanently log off from the KIX Field Agent App. It is not essential to log off every time the app is closed.

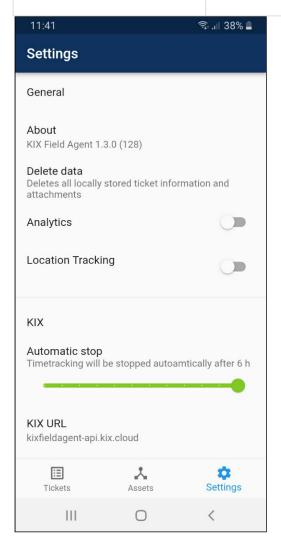


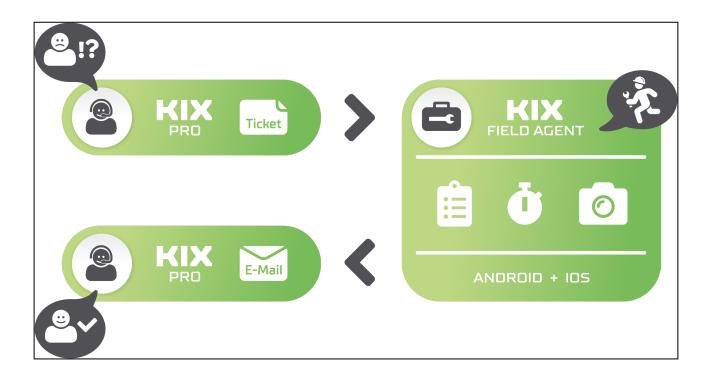
Fig.: Settings of the KIX Field Agent App





1.4.2 Example Use Case

The ticket is created as usual through a customer report via email or phone. In the KIX web app, a dispatcher prepares tickets to be processed by the field agent. When doing so, they link relevant FAQ entries and assets with the ticket, assign the correct organization and contact for the customer, and add any relevant reference articles (notes) to the ticket. They save checklists for processing the ticket with the ticket based on the work to be performed. Furthermore reference to the transfer of risk is also saved with the ticket if required. The dispatcher then assigns the ticket to a field agent.



In the KIX Field Agent App, the user now sees the jobs/tickets that they have been assigned, sorted in order of priority. They are able to make the content available offline and therefore "download" the tickets. If the user is unable to process the ticket because resources are unavailable or for another reason, they can decline the job with a brief justification.

When they accept the ticket for processing, the time recording function can start. This happens automatically when a note is created. The user is now able to document their work on the ticket using checklists, notes, and photos. If the time is recorded, it is possible to set whether or not the end customer should see this information on the work report. Once complete, the ticket processing workflow can be ended and the work carried out can be confirmed by the agent or the customer adding their signature. The app then creates work reports and updates the information in the ticket. Downloaded content is deleted from the mobile device.





1.4.3 Tickets

1.4.3.1 Ticket Creation

To create a new ticket, click the plus button in the ticket overview. A form will then open.

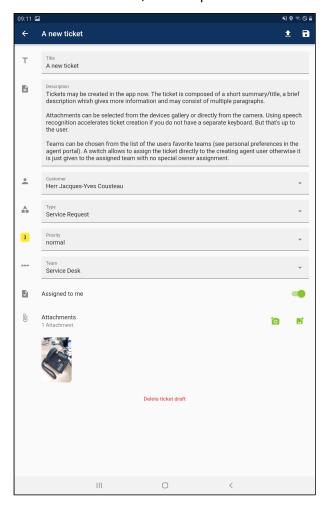


Fig.: Example of a completed form for a new ticket

Work through the individual lines step by step. If there is an arrow pointing down to the right of the field to be filled in, a selection menu opens when you click in the field.

Field	Description
Title	Enter the title of the ticket.





Field	Description
Description	This field contains all relevant information for this task. Please describe your request as precisely as possible so that a third person can understand the content.
Customer	Select the customer from the drop down menu. It is also possible to search specifically for a customer.
Туре	Select the type of ticket from the drop down menu e.g. service request.
Priority	Specify which priority the processing of the ticket should have.
Team	Select which team the ticket should be assigned to. Only teams to which you have permission are available.
Affected Asset	Enter an asset number here or use the QR code scan to specify one or more assets.
Assigned to me	By activating the slider you assign yourself the task.
Attachments	Here you can attach additional files to the ticket. Add them either as a photo or by uploading a file.
Delete ticket draft	Click here if you want to delete the draft of the new ticket.

There are two icons at the top right of the form. With these you have two options to secure the ticket:

• **a** By clicking you upload the new ticket to the KIX.

By clicking you save the draft of the ticket, but do not upload it to KIX yet.





1.4.3.2 Ticket Processing

Each ticket represents a work order. In the ticket detail view, you have the choice of declining the ticket or the order or accepting it for processing.

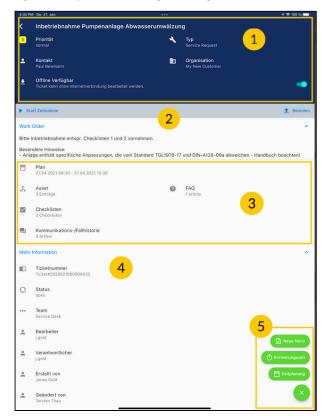
- Decline (see page 18)
- Checkout (see page 18)
- Timetracking (see page 22)
- Done (see page 24)
- Checklists (see page 25)
- New Note (see page 27)
- Pending Time (see page 29)

Decline

If you decline the ticket, the "New note" field opens. In it, state the reason for your rejection and save the note. Your note will be saved on the ticket in KIX and the ticket will be removed from your overview.

Checkout

If you accept the ticket by clicking "Checkout", it switches to edit mode.







Number	Section		Explanation
1	Ticket header data	Priority	Priorities indicate different urgencies in color (level 1-5) and can be used to classify tickets.
		Туре	Shows what type of request the ticket is about.
		Contact	Displays the name of the person who created the ticket or on whose behalf the ticket was created. Clickable: Opens the contact's data, combined with the option of sending an email directly to the contact.
		Organisation	Displays the organisation of the contact.
			<u>Clickable:</u> Opens the organization's data, along with the ability to view the organization's location on a map.
		Offline Available	After the ticket has been downloaded, it can also be processed without an internet connection.
			Clickable: Click to switch between online and offline.
			When the app switches back to online mode, all uploads are performed before the app displays itself as "online".
2	Workspace 1	Start Timetracking	Start working on the ticket, start timing by clicking the button.
		Done	When all work on the ticket is complete, end the time measurement by clicking the button.
		Work Order	Here you will find all work instructions and information about the order. You can expand or collapse this information by clicking on → and on the right edge of the image.





Number	Section		Explanation
3	Additional Information / Links	Plan	Shows the period during which the ticket is scheduled to be processed. Clickable: Clicking on the date opens a calendar in which you can first set the date and then the time of processing. If you change the start date, the target date is automatically adjusted by the previously specified period of time.
		Asset	Shows how many assets are linked to the ticket. Clickable: Clicking takes you to an overview of all assets stored on the work order/ticket, which can then be clicked directly. This gives you access to all device information.
		FAQ	Shows how many FAQs are linked to the ticket. Clickable: Clicking takes you to an overview of all FAQs attached to the work order/ticket, which can then also be clicked directly.
		Checklists	Shows how many checklists are linked to the ticket. <u>Clickable:</u> Clicking takes you to the overview of all associated checklists.
		Communication History	Shows how many work reports (already completed work orders) are linked to the ticket. Clickable: Clicking takes you to an overview of all work orders that have already been completed, which can then also be clicked directly and viewed.





Number	Section		Explanation
4	More Informationen	Ticketnumber	Displays the ticket number transmitted from KIX.
	miomidionen	State	Shows the status of the ticket.
		Queue	Shows which team the ticket is assigned to.
		Owner	Shows who the engineer of the ticket is.
		Responsible	Shows who is responsible for the ticket.
		Created by	Shows who created the ticket.
		Changed by	Shows who made the last change to the ticket.
		Created	Shows when the ticket was created.
		Last Changed	Shows when the ticket was last worked on.
		Affected Asset	Displays which asset is affected by the work order.
5	Workspace 2	New Note	Enter notes about your work order by clicking this button.
		Edit Pending Time	Set a time here at which the app should remind you to process your ticket.
		Edit Plan Time	This button takes you directly to the schedule time, which determines the period during which the ticket is scheduled to be processed. Clickable: Clicking on the date opens a calendar in which you can first set the date and then the time of processing. If you change the start date, the target date is automatically adjusted by the previously specified period of time.

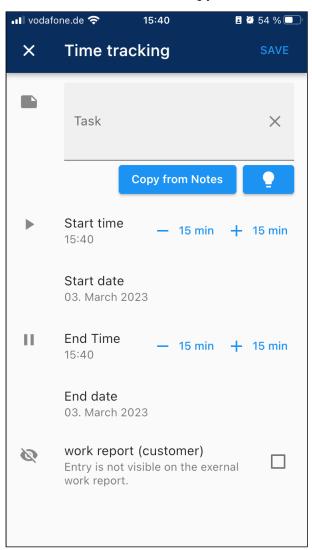




Number	Section		Explanation
		X	You can collapse this pane by clicking the "X".

Timetracking

When you start working on the ticket or at the beginning of each work step, you start the time tracking. This measures to the second how long you need for the task.



Field	Content
Task	Enter what task you are doing and additional information if necessary (e.g. in case of delay).





Copy from Notes	The task description of a time booking can now be set with the contents of notes with the same customer visibility. By clicking the button you insert the note.	
	Alternatively, a set of default values can be used: • travel time • processed as noted • processed as specified • see checklists • see work notes	
Start time	Click the button to adjust the time to the minute. You can also set the time using the blue +/-15 min buttons.	
Start date	Clicking opens a calendar in which you can re-enter the date if necessary.	
End time	Click the button to adjust the time to the minute. You can also set the time using the blue +/-15 min buttons.	
End date	Clicking opens a calendar in which you can re-enter the date if necessary.	
Work report	 You have the option of releasing this task for the work report that goes to the customer. To do this, tick the box. By default, the task and the recorded time are not stored in the work report. 	
	Finally click on "Save".	
X	If you opened the time tracking form by mistake, you can close it again by clicking the "X".	





Done

You can end the processing of a ticket or order at any time. To do this, click on "Done".

Termination can be done in two ways. The work report is signed by

- Signature by the editor
- · Signature by the customer

A form opens in which

- the work report (if available)
 - To view the work report when a ticket is closed, a separate window is available for a better view.
- · the completion code
 - Processing status:
 - · Completely,
 - · partially executed,
 - · cancelled,
- First name and last name of the agent (processor), alternatively first name and last name of the customer
- · and the signature are included.







Once you have filled out all fields, click on Save.

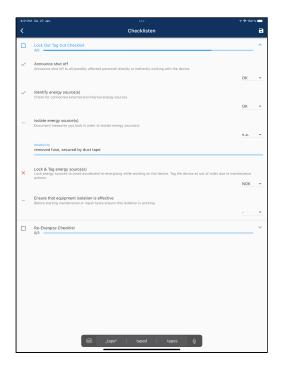
(i) Optional: If there is a dynamic field for acknowledging a transfer of risk, this is dealt with in an additional step with a signature.

Checklists

Checklists are delivered via the original ticket from the KIX. In order to process these, you must "Checkout" the ticket or order.







- A blue bar shows the progress the checklist is making in processing.
- Each task in the checklist has a selection box at the end from which you can select a status for that task:

Icon	State
-	-
Ō	pending
✓	ок
X	NOK (not ok)
-	n.a.

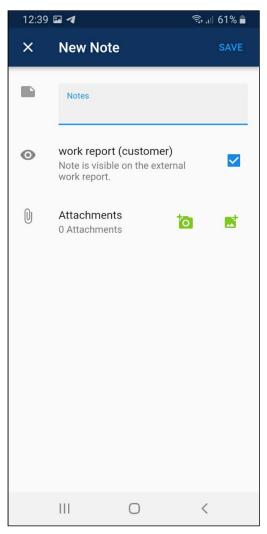
- Save your input by clicking on the icon
- If all tasks have been processed or given a final status, the checklist is considered completed. The box in front of the blue progress bar gets a blue tick.





New Note

After you have clicked the "New Note" button, the corresponding form will open.



Field	Content
Notes	Enter your notes in the text field.
Work Report	You have the option of releasing this note for the work report that goes to the customer or for the Self Service Portal.
	 To do this, tick the box. By default, the note is <u>not</u> stored in the work report or in the Self Service Portal.





Attachment	 Add attachments to the note. Click the camera icon to activate your mobile device's camera. Click the file icon to load documents, images or files from your mobile device's storage into the app.
	Finally click on "Save".
X	If you opened the note form by mistake, you can close it again by clicking the "X".



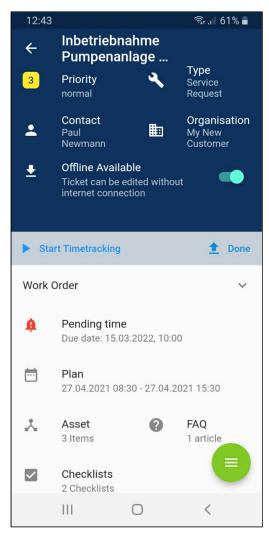


Pending Time

After you have clicked the button, a calendar opens first. Enter the date on which you would like to be reminded of the ticket or work order. Confirm the selection with "Ok".

A clock appears automatically in which you can set the time for the reminder. Confirm the selection again with "Ok". The reminder time is now active and is located as a "Waiting time" display below the work order and above the planned time.

When the time has been reached, the app sends a signal and draws your attention to the order or ticket. If the time has been exceeded, the icon turns red during the waiting time.







1.4.4 Assets

In the chapter "Basics for Use" you can see the overview of all assets.

1.4.4.1 Zoom View

When you select the asset, it changes to the zoom view. All information that appears in this view comes from the associated KIX.

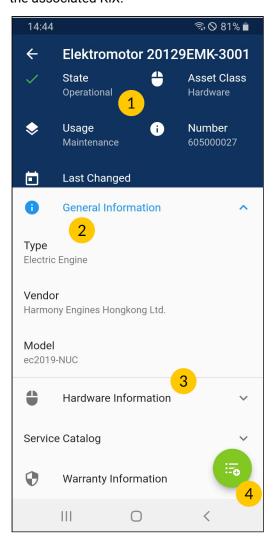


Fig.: Example of asset zoom view





Nr.	Content	Explanation
1	Header data of the asset	In this area you can see the following master data of the asset: • State • Asset Class • Usage • Number • Last Changed
2	General Information	In this section you will find Type Vendor Model
3	Hardware Information	You can take from this section: • Serial Number • Firmware Version
	Service Catalog	If the asset is subject to a Service Level Agreement, you will find the information here.
	Warranty Information	Warranty Expiration DatFirst Usage Date
4	Green Button	Clicking the button triggers a ticket creation in which the asset under consideration is automatically stored as an affected asset.





1.5 Administration

Below you will find instructions for smooth communication between the KIX Field Agent App (hereinafter: App) and the KIX Service Management System (hereinafter: KIX).

1.5.1 Required authorisations

The Field Service Agent must be created in the KIX system as a user with the following roles/authorisations:

- · Ticket Agent (MUST)
- FAQ Reader + Asset Reader (SHOULD)

We recommend the afore-mentioned authorisations so that the Field Service Agent can use the app optimally. The user administration can be found under *Admin > User management > Users*.

1.5.2 Updating of geo-position data

The app can transmit the geo-location data of your mobile device to KIX. Agents can thus recognise where the service employees are currently located. In this way, incoming fault messages can be routed directly to the service employee who is in the vicinity of the source of the fault.

The sending behaviour of the app can be controlled in the Admin module of the KIX Service Management System. This is done under *Admin > System > SysConfig* in the following keys:

Key	Description	Values
KIXMobileApp::GeoPosition::C hangeThreshold	Defines from which position change the app sends the new position (distance in metres).	Natural numbers >0 The default value is used for invalid entries. Default: 1000
KIXMobileApp::GeoPosition::E nabledByDefault	Determines whether the reporting of the position is active or inactive after the user has logged in to the app for the first time. The settings in the app apply to further use.	0 - inactive (default) 1 - active





1.5.3 Tickets

Important note

In order for a ticket to be displayed in the app, it MUST now have set the Dynamic Field "MobileProcessingState". In the app, only those tickets are displayed in the lists "My tickets" and "Other tickets" that have the values "assigned", "accepted", "downloaded", "partially executed", "processing", "suspended", "cancelled" or "completed" as mobile processing status. Tickets in MobileProcessingState "rejected" are no longer considered by the app.

1.5.3.1 Team assignment when creating a ticket

The selected queues must be stored in the agent's personal settings, otherwise the default settings (PostmasterDefault settings) apply.

1.5.3.2 Form data / Available dynamic fields

From v1.8 of the Field Agent app, dynamic fields can be made available offline or entered in the app. However, settings must be made in the SysConfig for this:





Key	Description	Values
KIXMobileApp::TicketDyna micFields	Defines a list of dynamic ticket fields that are viewed in the app at all. The list consists of dynamic field names (e.g. "WorkOrder") or regular expressions that match dynamic field names (e.g. "Work.*").	["MobileProcessingState","Risk AssumptionRemark","MobilePr ocessingChecklist.*"]
	Selected dynamic fields such as MobileProcessingState, PlanBegin, PlanEnd are permanently used by the app and cannot be removed or changed in their app behaviour by this setting.	
	Field types that are available for input (see KIXMobileApp::TicketDynamicFields::Edit) are displayed in the "Form Data" section. Other field types are displayed as plain text values in the "More Information" section.	
KIXMobileApp::TicketDyna micFields::Edit	Defines a list of dynamic ticket fields that can be displayed and edited in the app in the "Form Data" section. The lists consist of dynamic field names (e.g. "WorkOrder") or regular expressions that match dynamic field names (e.g. "Work.*").	["MobileProcessingChecklist.*", "SomeTextArea", "SomeTextField", "SomeDateField", "SomeDateTimeField", "SomeSelectionField", "SomeTableField"
	The fields are displayed in the app in the order defined in this key.]
	Note: Please note that field types that are not supported by the app are not available for input.	

The app obtains these configuration settings when you log in. After making changes to the configuration, it is necessary to log out and log in to the app.





1.5.4 Make time recording optional

Time recording can also be optional on tickets if required. For this, a dynamic field named "TimeAccountingRequired" must exist and contain the value "no".

If the field is not present, not set, or set with a different value, the app will behave as before. The timekeeping starts when the ticket is processed.

If the field is set with the value "no", the app will not start time recording on the ticket automatically as soon as a note is created. Optionally, it is still possible to make a free time booking.





1.6 Liability Disclaimer for KIX Field Agent App

1.6.1 Liability for Contents

The contents of our pages and documents have been prepared with the utmost care. Nevertheless, no liability can be accepted for any technical or editorial errors or omissions in this document. This also applies to any incidental or consequential damages that may arise from the provision, function or use of this material.

Please feel free to send any comments regarding design, additions or possible errors to our support team (https://forum.kixdesk.com) at any time. We will gladly take up and implement sensible suggestions and improvements.

All data, features and descriptions given in this work are subject to change at any time and without notice. Personal names and company names are fictitious. Any coincidences with real persons and companies are purely coincidental.

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Our website contains links to external websites of third parties over whose content we have no influence. Therefore, we do not assume any liability for these external contents. The respective provider or operator of the pages is always responsible for the content of the linked pages. The linked pages were checked for possible legal violations at the time of linking. Illegal contents were not recognisable at the time of linking.

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1.6.3 Copyright

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1.7 Purpose for which the use of KIX Field Agent App is intended within a medical context

KIX Field Agent App is not suitable, intended or approved for the identification, prevention, monitoring, treatment, relief or compensation of illnesses, injuries and disabilities. KIX Field Agent App is also not intended for the examination, replacement or modification of the anatomical structure or of a physiological process. KIX Field Agent App must also not be used to directly control a diagnostic or therapeutic product. Furthermore, KIX Field Agent App is not designed to be used in conjunction with a medical device with the intention of enabling the medical device to fulfill its intended purpose.

In a medical context, KIX Field Agent App is exclusively intended for carrying out administration and database-related tasks. If the above restrictions are complied with, KIX Field Agent App is suitable for use in a medical environment

- · purely for documentation purposes, such as:
 - the general management of equipment in the form of managing and cataloging device data (device meta data) such as names, IP addresses, series numbers, persons responsible, guarantee periods, service providers, operating documents, license information, cost centers, as well as the management/organisation of users, device instructions;
 - 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.

KIX Field Agent App is not designed for enabling or guaranteeing the functioning of medical devices and must therefore not be used for these purposes. If in the context of the aforementioned functions KIX Field Agent App also allows data exchange via an interface, please note that KIX Field Agent App must not be used for data modification or for any type of data control for medical or therapeutic purposes.

KIX Field Agent App may only be used in a medical context within the approved parameters mentioned above. KIX Service Software GmbH assumes no liability for any use that goes beyond or deviates from the approved parameters.

