



# **KIX Start**

KIX 17 User Manual - EN

Issued on: 13.02.2024



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# 1 Introduction


KIX is a browser-based service system for IT and technical service. It is the ideal basis for the organization and the service business to grow with the system.

The software is open source and contains many functions to support the following areas of application:

- IT service
- Technical service
- Maintenance / servicing
- Customer service

Common use cases are:

- INVENTORY MANAGEMENT - Acquisition, management and overview of technical equipment, hardware, network and software including licenses
- MALFUNCTION MANAGEMENT - Recording and processing of requests for malfunction reports
- REPORTING - Evaluation and analysis of the service key figures for targeted information of the management
- WORKFLOW MANAGEMENT - Support and monitoring of work processes, case processing and operating procedures. Standardized process quality through ITIL-compliant IT service desk

 This edition of the manual refers to the KIX 17.22 release.

We have created a separate manual for the users of **KIX Pro 17**. It is a supplement to the KIX Start 17 manual and describes the additional functions contained in the Pro version.

Your administrator can customize the program's interface and integrate additional input and selection fields into the interface. The view in your KIX system may therefore differ from the illustrations in the manual. In the manual we only use the standard views.

In addition, you will find further documentation on the additional modules or on KIX 18 at: <https://docs.kixdesk.com/>.

We cordially invite you to become part of our KIX community and to support us with helpful tips in the further development of KIX and user information.

## 1.1 To understand

In these instructions, the masculine form according to the grammar is used in a neutral sense. It always appeals to all male, female and diverse readers. Gender variants are not used for reasons of readability and understanding of the text. We ask all readers for their understanding for this simplification in the text.



## 1.2 Terms

This section explains the most important terms of the ticket system and KIX software.

Term	Explanation
Agent	Is an owner or responsible person for a ticket.
Contact (previously: CustomerUser)	Is a person who creates a ticket or has a ticket created.
Admin	Is a person who has admin permissions in KIX.
Queue	Comparable with the "inbox" folder in standard email programs. Multiple different queues allow categorization of incoming tickets.
Ticket	Describes an incoming transaction/article including resulting work steps.
Article	Describes a work step within a ticket.
Priority	Tickets can have different priorities. Traffic light colors are used to highlight different priorities.
State	Indicates the current processing state of a ticket.
Owner	Is the current owner of a ticket or the person who edited a ticket before said ticket's approval.
Responsible person	They can specify which employees are to process the ticket, or process the ticket themselves. They are also notified if the transaction is being processed. As default, admin user "Admin KIX" has been pre-configured as responsible person.
Incident	Describes an error or an incident of an IT Service or a ConfigItem.

Term	Explanation
ConfigItem	All operating material involved in the business processes, e.g. computer, software, telephones, network components, rooms, or buildings. ConfigItems are divided into classes.
Service catalog	The service catalog describes all offered, current, future, and past services with information about delivery results, prices, contact information, orders, and queries.
Service	Describes very generally any type of service which a service provider uses to support a customer in reaching their target, and to generate added value, without the customer needing to take on specific costs and risks for it.
Service Level Agreement (SLA)	An agreement is made between a service provider and customer regarding a service to be provided by department responsible for said service. A Service Level Agreement (SLA) allows escalation-relevant information to be saved, which defines the quality of the corresponding service.
Service Time	Is the time in which a service, according to the Service Level Agreement, is to be delivered.
Criticality	If a service fails within a company, said company will know, through levels of criticality, how important said service is. Criticality is directly linked to a service, and can be specified separately for each service.
Impact	Is a measure of the effects of an incident or problem on a work process.
Failure Time	Period in which a ConfigItem or service is out of commission within the agreed service time.
First Response Time	If a service fails within a company, an agent must respond to this failure within a specified period. The time begins with notification of the error, and ends with first contact with customer.
Response Time	Another word for First Response Time.



<b>Term</b>	<b>Explanation</b>
Update Time	Describes the time in which another change to the ticket must be carried out. A change can be any email or a state change.
Solution Time	A service failure must be rectified within this specified period. Time begins with notification of error, and ends when error has been rectified.





## 2 The KIX User Interface

The following sections describe the KIX user interface and its control elements.

## 2.1 The Customer Frontend

The KIX customer front end is the graphical user interface (GUI) for contacts. You reach the customer frontend by writing "customer.pl" instead of "index.pl" at the end of your KIX URL.

The contact can use the graphical user interface to:

- Create new tickets
- Display tickets which have already been created
- Search according to created tickets
- Search and read FAQ articles
- Create tickets based on ticket templates
- Start defined template workflows and processes

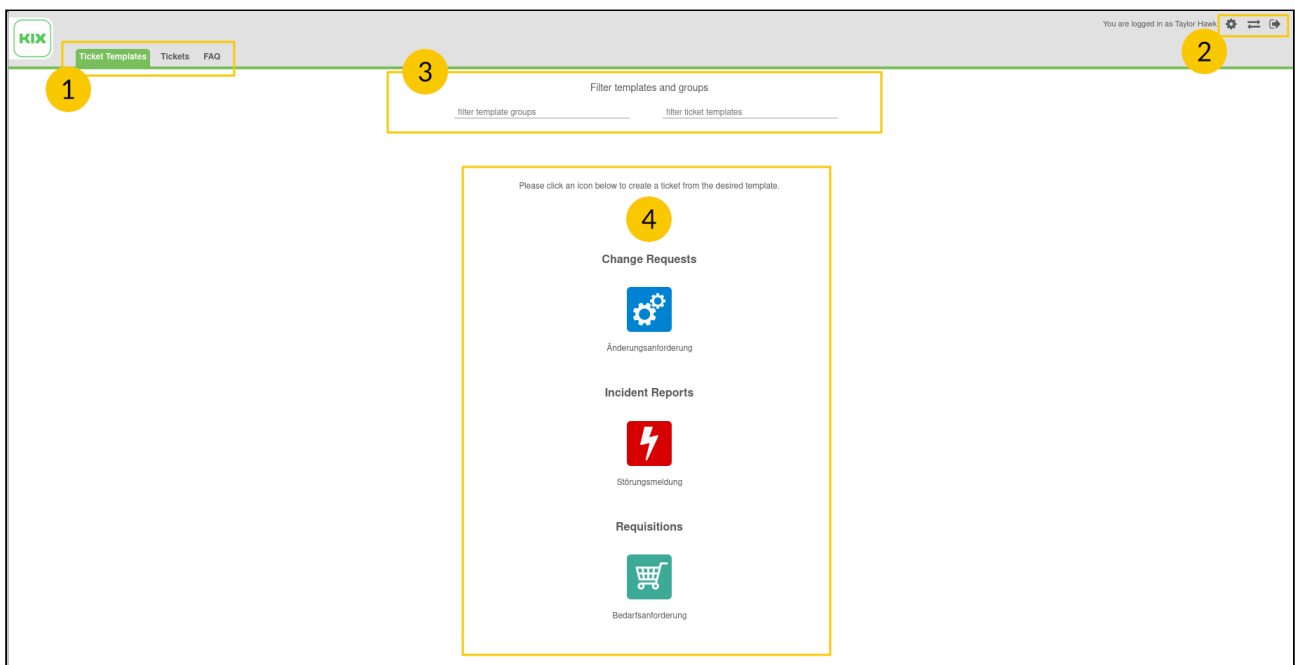





Figure: Customer Frontend Graphical User Interface (Example)

Number	Function	Explanation
1	Menu bar	<ul style="list-style-type: none"> <li>• Show ticket templates</li> <li>• Create new tickets/display already created tickets in a list</li> <li>• Display, search and read FAQ articles in a list</li> </ul>

Number	Function	Explanation
2	Special functions	 Personal preferences - Click to access your personal settings.
		 Change button - Clicking this takes you to the agent portal.
		 Logout - By clicking you log out of the customer portal.
3	Content	By entering words or parts of words, you can limit the number of groups and templates displayed or search for a specific group or template.
4	Content	Display of groups and ticket templates. By clicking on the respective icon, you open a new ticket from the desired template.

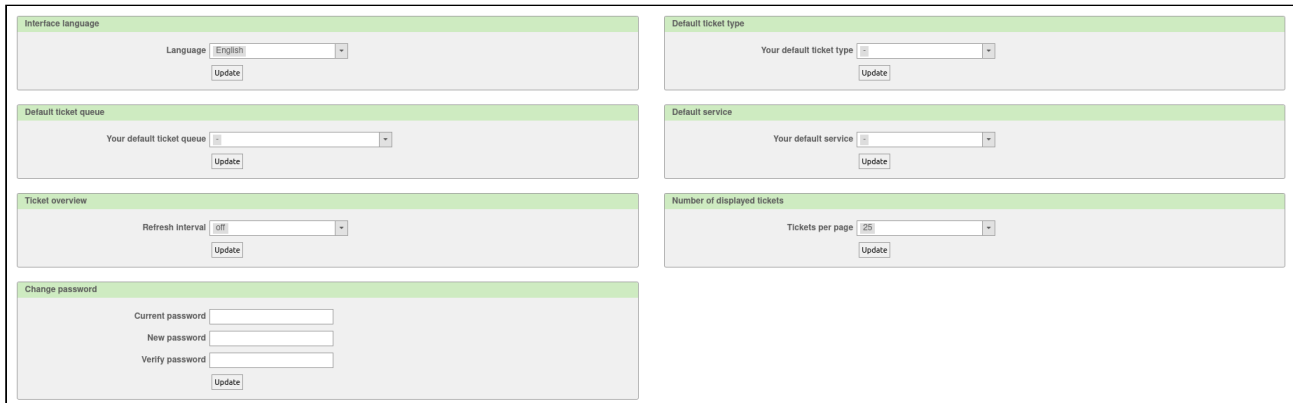
There may be links in the footer, for example to the imprint or the data protection declaration.

** Please note**

- To work with the graphical user interface, it is assumed that the contact has been created in the KIX system.
- Ticket templates, template workflows, and process definitions can be defined in the Admin area.

## 2.1.1 Personal Preferences

In this area you define your personal settings. These take effect when you update the selected field.



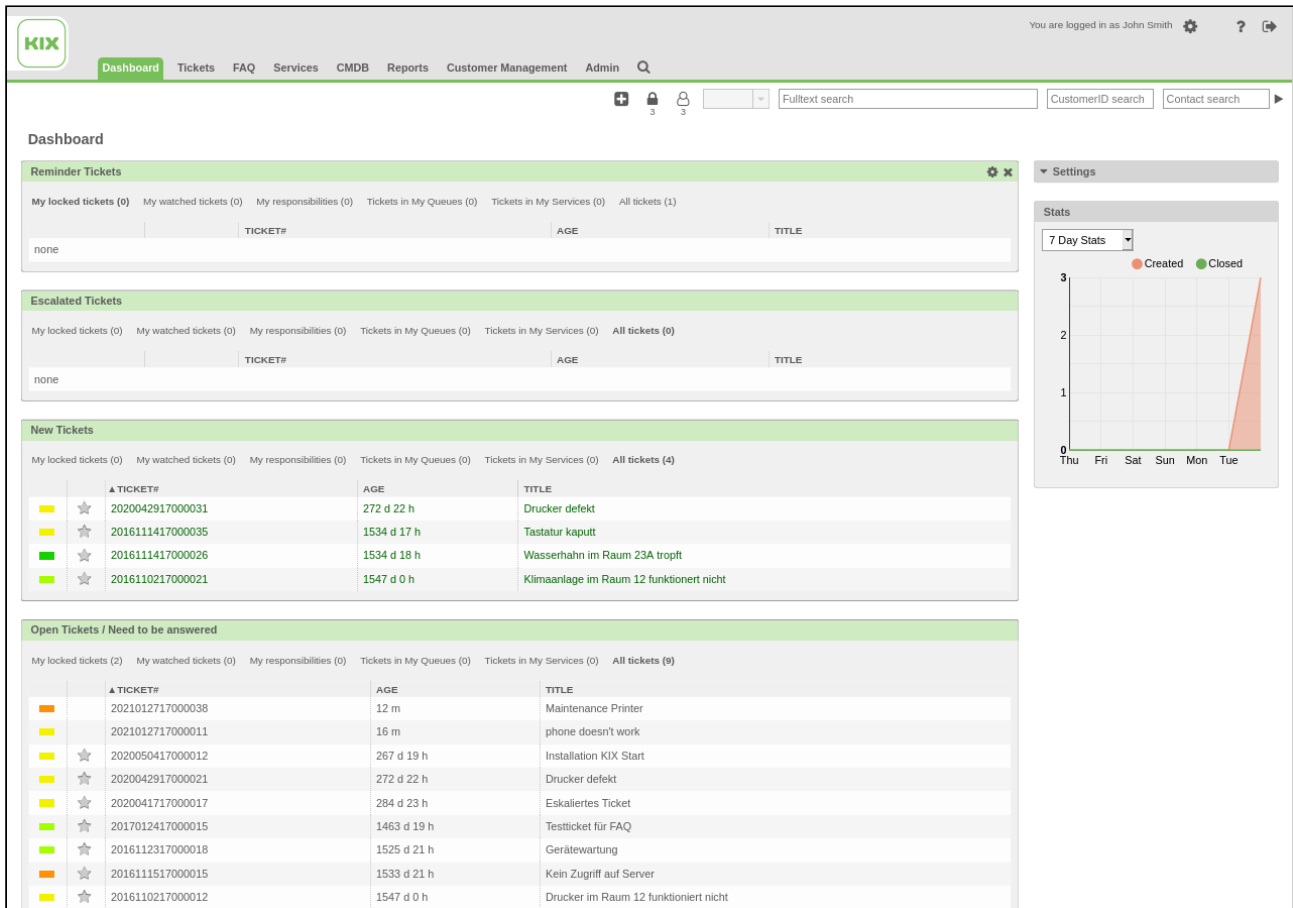
*Figure: Personal preferences*

You can define the following settings:

- Interface language
- Default ticket queue
- Refresh interval for the ticket overview
- Change password
- Default ticket type
- Default service
- Number of displayed tickets

## 2.2 The Agent Frontend

The agent frontend is the graphical user interface (GUI) for agents.



The screenshot displays the KIX Agent Frontend Start Page. The top navigation bar includes 'Dashboard', 'Tickets', 'FAQ', 'Services', 'CMDB', 'Reports', 'Customer Management', and 'Admin'. A search bar is located below the navigation. The main content area is divided into several sections:

- Reminder Tickets:** A table with columns for TICKET#, AGE, and TITLE. It shows 1 ticket with a status of 'none'.
- Escalated Tickets:** A table with columns for TICKET#, AGE, and TITLE. It shows 0 tickets.
- New Tickets:** A table with columns for TICKET#, AGE, and TITLE. It shows 4 tickets:
 

TICKET#	AGE	TITLE
2020042917000031	272 d 22 h	Drucker defekt
2016111417000035	1534 d 17 h	Tastatur kaputt
2016111417000026	1534 d 18 h	Wasserhahn im Raum 23A tropft
2016110217000021	1547 d 0 h	Klimaanlage im Raum 12 funktioniert nicht
- Open Tickets / Need to be answered:** A table with columns for TICKET#, AGE, and TITLE. It shows 9 tickets:
 

TICKET#	AGE	TITLE
2021012717000038	12 m	Maintenance Printer
2021012717000011	16 m	phone doesn't work
2020050417000012	267 d 19 h	Installation KIX Start
2020042917000021	272 d 22 h	Drucker defekt
2020041717000017	284 d 23 h	Eskaliertes Ticket
2017012417000015	1463 d 19 h	Testticket für FAQ
2016112317000018	1525 d 21 h	Gerätewartung
2016111517000015	1533 d 21 h	Kein Zugriff auf Server
2016110217000012	1547 d 0 h	Drucker im Raum 12 funktioniert nicht

On the right side, there is a 'Stats' widget showing a 7-day chart for 'Created' (red) and 'Closed' (green) tickets. The chart shows a significant increase in created tickets on Tuesday.

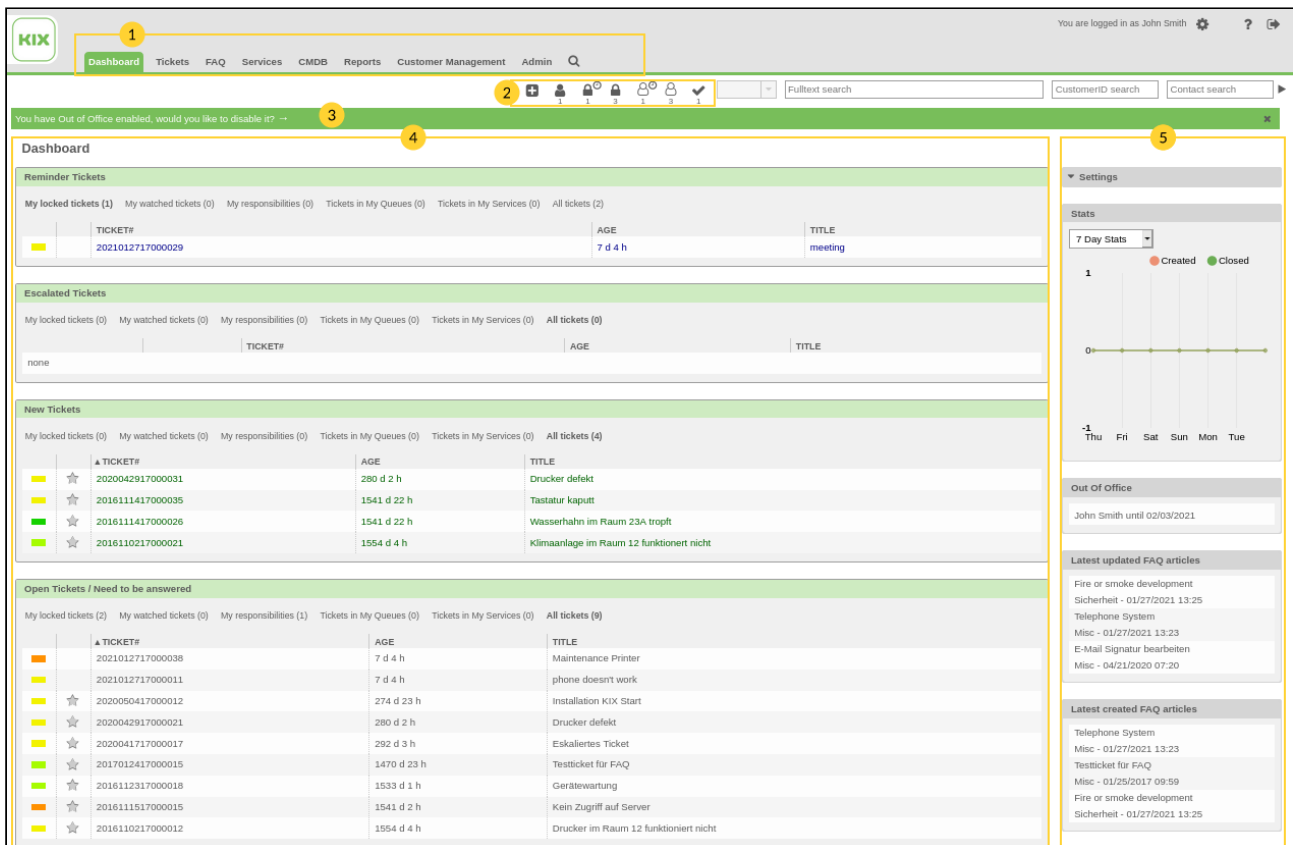
Figure: Agent Frontend Start Page

Agents can use it to:

- Search, display, create, and edit tickets
- Search, display, create, and edit FAQ articles
- Define and edit ConfigItems (CIs)
- Display, create reports
- Search, display, create, and edit customers and contacts
- Display services and SLAs
- Edit settings for KIX system

## 2.3 User Interface Elements

KIX features an ergonomic and clear graphical user interface. The main elements of the user interface are described in this section.



The screenshot displays the KIX Agent Frontend interface. At the top, a navigation menu (1) includes Dashboard, Tickets, FAQ, Services, CMDB, Reports, Customer Management, and Admin. Below this is a toolbar (2) with icons for user management and search. A green information bar (3) shows a notification: "You have Out of Office enabled, would you like to disable it?". The main content area (4) is divided into sections: "Reminder Tickets" (1 ticket), "Escalated Tickets" (none), "New Tickets" (4 tickets), and "Open Tickets / Need to be answered" (9 tickets). Each section contains a table with columns for TICKET#, AGE, and TITLE. On the right, a sidebar (5) contains a "Settings" section with a "7 Day Stats" chart showing "Created" (red) and "Closed" (green) tickets, an "Out of Office" status for John Smith, and sections for "Latest updated FAQ articles" and "Latest created FAQ articles".

Figure: Graphical User Interface in Agent Frontend

The graphical user interface consists of the following elements:

1. Menu bar
2. Toolbar
3. Information bar
4. Content Area
5. Sidebar

## 2.3.1 Menu Bar

The menu bar in KIX is located at the top edge of the screen. The menu bar contains various menus and buttons, depending on the KIX modules installed.

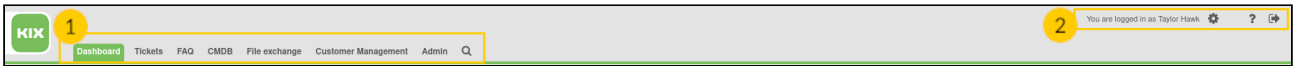






Figure: Example of Menu Bar

1	Main menu
2	Login: registered user
	"Personal preferences" button: Calls up personal preferences area.
	"Switch to customer/agent frontend" button: Switches between agent/customer frontend.
	"KIX Online Help" button: Calls up online help for KIX.
	"Logout" button: Logs out of KIX.

Left-click a menu item to open a drop-down menu with different module-dependent menu items. Left-clicking will activate the highlighted menu item.

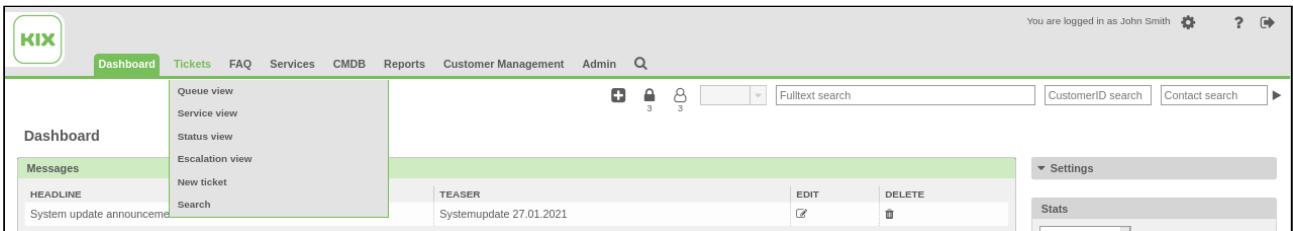



Figure: Menu Bar with Selected Menu Item

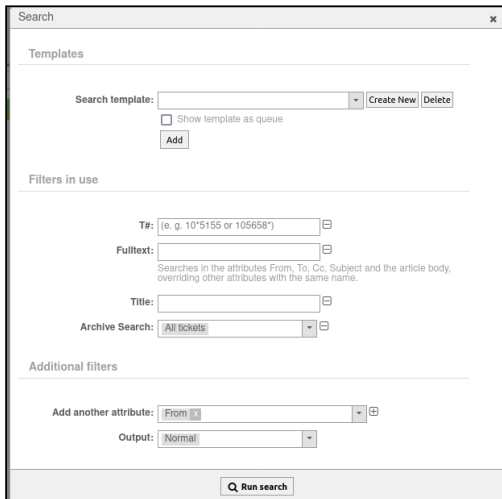
**Please note**

- The number of menu items in the menu bar depends on the KIX modules installed. The order of menu items can be arranged as desired.
- Switching between agent/customer frontend requires the same login details to be assigned to agent and contact. If  button is hidden, please contact your KIX system administrator.



### 2.3.1.1 Overview of Search Parameters

In the main menu of the menu bar there is a magnifying glass symbol behind which the search function is hidden. Click on it and a window will open:



Below you will find an overview of all parameters for the full-text search:

- AND
- OR
- Parentheses (termA AND termB) OR termC
- Single quotes for entire strings "word to word" (the complete string must appear for this)
- Placeholder \*
- Ticket numbers (incl. TicketHook)

**!** When creating search templates, no ":" may be used in the name. This leads to an unwanted behaviour of the system, as a result of which all tickets are displayed on the dashboard when integrated into widgets.

All content is searched, including dynamic fields (if your admin has configured this).

## 2.3.2 Toolbar

The toolbar is located under the menu bar. It features various symbols and input fields and allows for quick access to different KIX views and functions.

The input fields allow for searching by tickets, customers, or contacts in the KIX system.

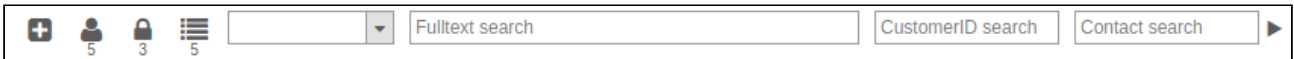

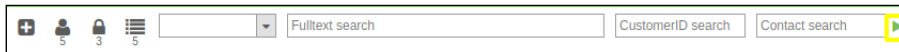


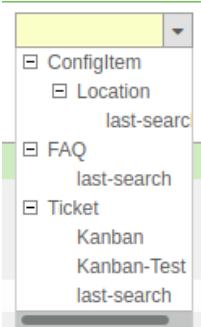
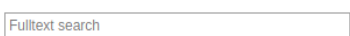

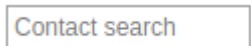
Figure: Toolbar















### Displaying/Hiding Toolbar








- To display toolbar: Click button 
- To hide toolbar: Click button



### Symbols in Toolbar

Symbol	Explanation
	Selection field for saved search templates.
	Input field for fulltext search.
	Input field for search by CustomerID (ID).
	Input field for search by contact (login).

Symbol	Explanation
	Shows all locked tickets within an agent's remit.
	Shows all locked tickets within an agent's remit and which have reached pending time. Symbol is shown if ticket is in "pending" state and pending time has been exceeded.
	Shows all locked tickets with unread articles within an agent's remit.
	Shows all locked tickets which agent is responsible for.
	Shows all locked tickets for which agent is responsible, and which reached pending time.
	Shows all locked tickets with unread articles for which agent is responsible.
	Shows all tickets for which the agent is set as processor.
	Shows all tickets for which the agent is set as processor and which have reached the reminder time.
	Shows all tickets for which the agent is set as processor with new articles.
	Shows all watched tickets.
	Shows all watched tickets which have reached pending time.
	Shows all watched tickets with unread articles.
	Shows "QueueView: My Queues".
	Shows "Status View: Open tickets".

Symbol	Explanation
	Shows "Ticket Escalation View: Today".
	Shows form for new telephone ticket.
	Shows form for new email ticket.
	Shows form for new process ticket.
	Shows all tickets with "ToDo articles".
	Shows all tickets marked as important.
	Shows all tickets in "My Services".

### 2.3.3 Information Bar

The information bar is located under the toolbar. The information bar displays KIX system messages. The information bar color depends on the type of system message.

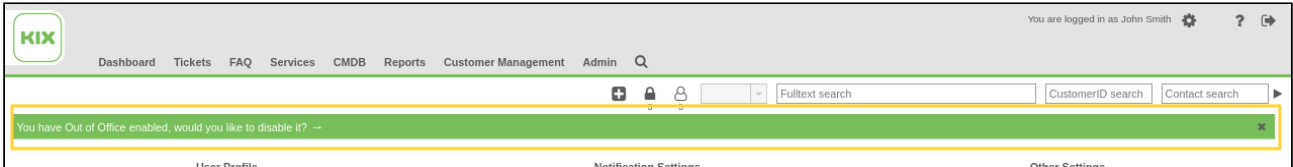


Figure: Information Bar

Hide the information bar using "x" symbol.

## 2.3.4 Contents Area

Depending on module, the KIX contents area shows different widgets with information and functions.

**Dashboard**

**Messages**

HEADLINE	TEASER	EDIT	DELETE
System update announcement	Systemupdate 27.01.2021		

**Escalated Tickets**

My locked tickets (0) My watched tickets (0) My responsibilities (0) Tickets in My Queues (0) Tickets in My Services (0) All tickets (0)

TICKET#	AGE	TITLE
none		

**New Tickets**

My locked tickets (0) My watched tickets (0) My responsibilities (0) Tickets in My Queues (0) Tickets in My Services (0) All tickets (4)

TICKET#	AGE	TITLE
2020042917000031	273 d 0 h	Drucker defekt
2016111417000035	1534 d 19 h	Tastatur kaputt
2016111417000026	1534 d 19 h	Wasserhahn im Raum 23A tropft
2016110217000021	1547 d 2 h	Klimaanlage im Raum 12 funktioniert nicht

**Open Tickets / Need to be answered**

My locked tickets (2) My watched tickets (0) My responsibilities (0) Tickets in My Queues (0) Tickets in My Services (0) All tickets (9)

TICKET#	AGE	TITLE
2021012717000038	1 h 59 m	Maintenance Printer
2021012717000011	2 h 3 m	phone doesn't work
2020050417000012	267 d 21 h	Installation KIX Start
2020042917000021	273 d 0 h	Drucker defekt
2020041717000017	285 d 0 h	Eskaliertes Ticket
2017012417000015	1463 d 21 h	Testticket für FAQ
2016112317000018	1525 d 23 h	Gerätewartung
2016111517000015	1533 d 23 h	Kein Zugriff auf Server
2016110217000012	1547 d 2 h	Drucker im Raum 12 funktioniert nicht

**Stats**

7 Day Stats

Created Closed

Figure: Contents Area with Different Widgets

Widgets are boxes and tiles which include and display different information, views, and functions. For some widgets, contents of the widgets can be manually configured.







**Open Tickets / Need to be answered**

My locked tickets (2) My watched tickets (0) My responsibilities (0) Tickets in My Queues (0) Tickets in My Services (0) All tickets (9)

TICKET#	AGE	TITLE
2021012717000038	1 h 59 m	Maintenance Printer
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2020050417000012	267 d 21 h	Installation KIX Start
2020042917000021	273 d 0 h	Drucker defekt
2020041717000017	285 d 0 h	Eskaliertes Ticket
2017012417000015	1463 d 21 h	Testticket für FAQ
2016112317000018	1525 d 23 h	Gerätewartung

Figure: Widget Example



Symbols  and  appear when cursor is hovered over upper right widget edge. Widgets can be hidden completely using  symbol. For some widgets, settings can be called up using  symbol. The "Settings" widget can be expanded or hidden via   symbols.

## 2.3.5 Text Editor

KIX provides a text editor for creating tickets, creating FAQs and other content. This works in the same way as the common writing programs.

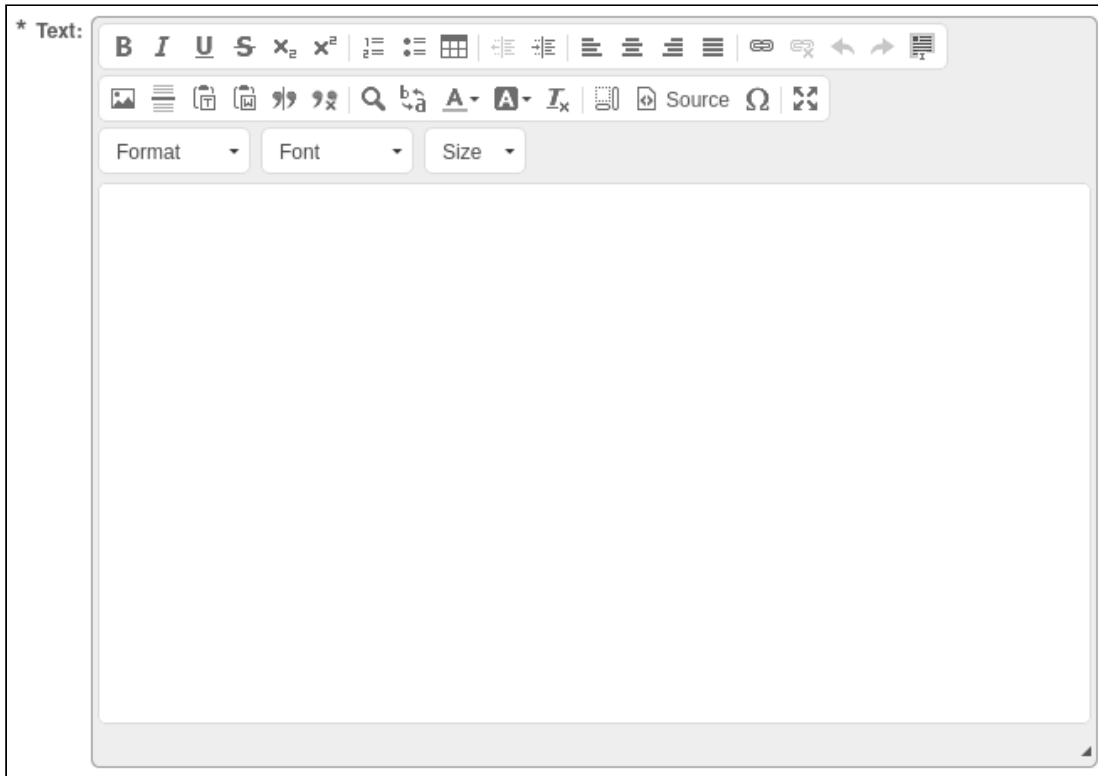
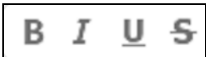
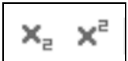
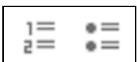



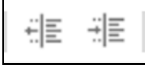








Figure: Text editor (CKEditor Version 4.16.0<sup>1</sup>) here in the "New ticket" form







If you move the mouse over the respective button, a keyword for the function of the button is displayed.

Symbol(s)	Function
	Here you can edit the font style: Bold, Italic, Underlined and Strikethrough
	Allows you to insert subscript or superscript characters
	Allows you to insert lists: numbered or unordered

<sup>1</sup> <https://ckeditor.com/cke4/release/CKEditor-4.16.0>



Symbol(s)	Function
	<p>Table: This button opens a window in which you can define the type, size and design of a table that is to be inserted at the cursor position.</p>
	<p>Text indentation: You can use this to decrease indent or increase indent the text.</p>
	<p>Format your text set: aligned left, centered, aligned right, justified</p>
	<p>Insert / Remove Links: This button opens a window in which you can insert both Internet links and shortcuts within the system. The text to be linked must be marked for this.</p>
	<p>By clicking on it, you can undo or redo the last action performed within the editor.</p>
	<p>Select all: You can select the entire content by clicking on it.</p>
	<ul style="list-style-type: none"> <li>• Insert image: A window opens in which you can specify the source and the type of display and integration of the image.</li> <li>• Insert a horizontal line.</li> <li>• Past previously saved text as plain text.</li> <li>• Past previously saved text from Word.</li> </ul>
	<p>Use these buttons to edit quotes: split quotation, remove quotation</p>
	<p>Find: This button opens a window in which you can search for a specific word in the text.</p> <p>Replace: This button opens a window in which you can replace a searched word in the text with another.</p> <p> The dialog window that opens is the same. It contains two tabs that you can easily switch between.</p>

Symbol(s)	Function
	You can use these two buttons to adapt both the text color and the background color to your needs.
	You can use this to remove formatting from previously selected text.
	These two buttons relate to the HTML view: <ul style="list-style-type: none"> <li>• Show blocks: Show blocks formatted in HTML.</li> <li>• Source: Switch to HTML view.</li> </ul>
	You can use this to insert special characters (e.g. €).
	Maximize the editor and use it in full screen.
	Adjust the previously marked text to your needs: <ul style="list-style-type: none"> <li>• Format (z. B. Heading 1)</li> <li>• Font (z. B. Arial)</li> <li>• Size (z. B. 12px)</li> </ul>

Another configuration option for each text editor used in the system can be found in the "personal settings". Use the "Use browser context menu" box to specify that the browser's context menu is used in the text editor. By setting "Yes", for example, the spell check of the browser can be used.



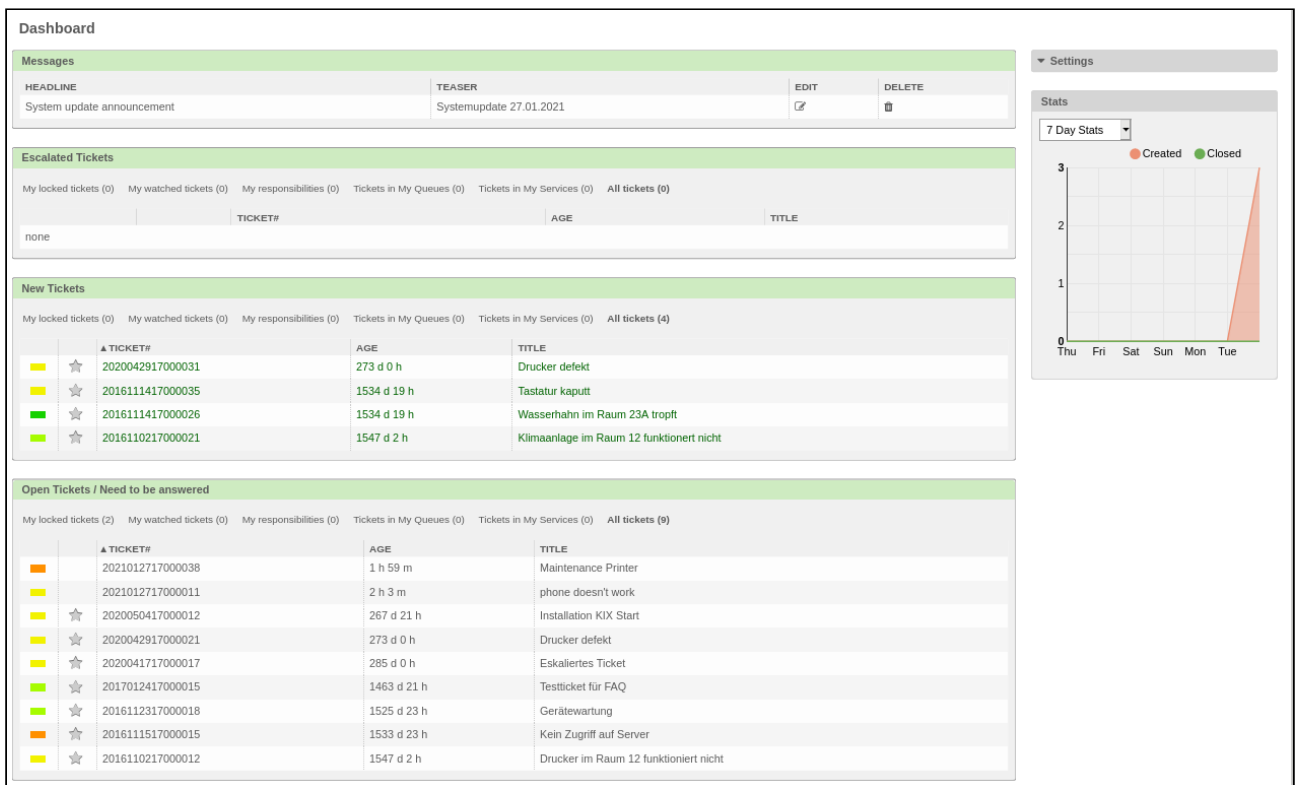
## 3 KIX Modules

KIX is composed of different modules.

Information about individual KIX modules can be found in the following sections.

### 3.1 Module: Dashboard

The "Dashboard" module has a contents area featuring different widgets with information about tickets and other data.



The dashboard is divided into several sections:

- Messages:** A table with columns for HEADLINE, TEASER, EDIT, and DELETE. It shows a system update announcement from 27.01.2021.
- Escalated Tickets:** A summary row showing counts for locked, watched, responsibilities, queues, services, and all tickets (0). Below is a table with columns for TICKET#, AGE, and TITLE.
- New Tickets:** A summary row with the same counts as Escalated Tickets, but with 4 total tickets. Below is a table with columns for TICKET#, AGE, and TITLE, listing tickets like 'Drucker defekt' and 'Tastatur kaputt'.
- Open Tickets / Need to be answered:** A summary row with 2 locked and 9 total tickets. Below is a table with columns for TICKET#, AGE, and TITLE, listing tickets like 'Maintenance Printer' and 'phone doesn't work'.
- Settings and Stats:** A sidebar on the right with a 'Settings' dropdown and a 'Stats' section. The Stats section includes a '7 Day Stats' dropdown and a line chart showing 'Created' (orange) and 'Closed' (green) tickets over a 7-day period.


Figure: Contents Area with Widgets

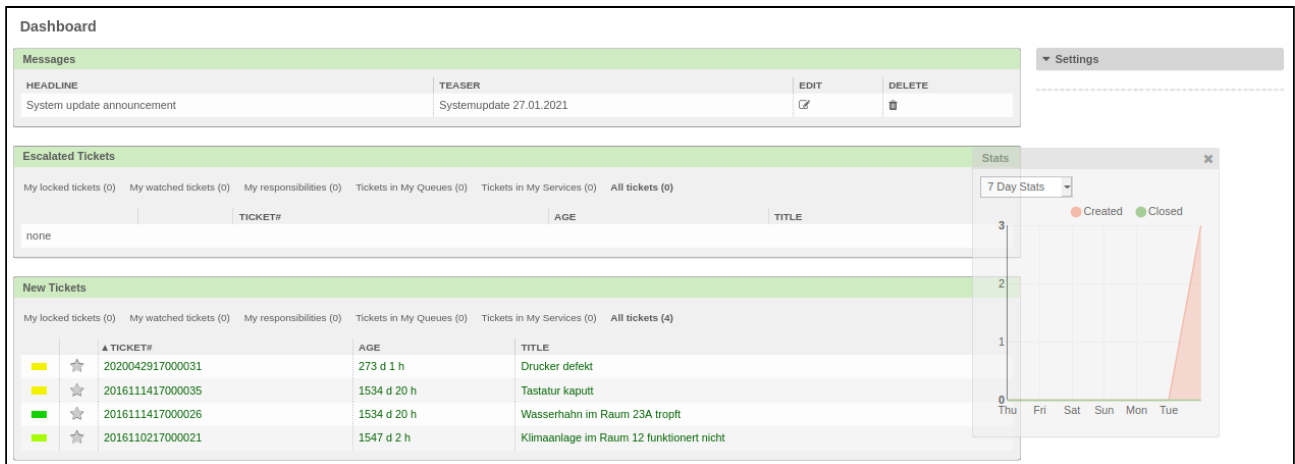
In the default configuration, ticket data is located to the left, divided into:

- Reminder Tickets
- Escalated Tickets
- New Tickets
- Open Tickets / Need to be answered

The sidebar is on the right. Widgets in this area show different information. The type of information shown in the sidebar can be individually adjusted.

### 3.1.1 Adjusting Widget Order in Contents Area

- Move cursor to upper left widget area until mouse symbol  appears
- Hold down the left mouse button and drag the widget to the desired position in the content area.
- Possible positions are highlighted.
- The new order is retained even after you have logged off.



The screenshot shows the KIX Dashboard interface. At the top, there is a 'Messages' section with a table containing one row: 'System update announcement' with a 'TEASER' of 'Systemupdate 27.01.2021' and 'EDIT' and 'DELETE' buttons. Below this is the 'Escalated Tickets' section, which is currently empty. To the right of this section is a 'Stats' widget showing a '7 Day Stats' chart with a legend for 'Created' (red) and 'Closed' (green). The chart shows a single red bar on Tuesday. Below the 'Escalated Tickets' section is the 'New Tickets' section, which contains a table with four rows of ticket data. A hand cursor is visible over the top-left corner of the 'Escalated Tickets' widget, indicating it is being moved.

TICKET#	AGE	TITLE
2020042917000031	273 d 1 h	Drucker defekt
2016111417000035	1534 d 20 h	Tastatur kaputt
2016111417000026	1534 d 20 h	Wasserhahn im Raum 23A tropft
2016110217000021	1547 d 2 h	Klimaanlage im Raum 12 funktioniert nicht

Figure: Moving a widget

### 3.1.2 Filter Options within a Widget

Tickets shown in a widget can be filtered according to the following options:

- "My Locked Tickets": Shows all tickets for which agent is owner.
- "My responsibilities": Shows all tickets for which agent is set as responsible person.
- "Tickets in My Queues": Shows all tickets in queues which agent has defined as "My Queues".
- "Tickets in My Services": Shows all tickets which are linked to a service, which agent defined in "My Services".
- "All tickets": Shows all tickets.
- Click one of the filter options to filter tickets.





Open Tickets / Need to be answered				
My locked tickets (2)   My watched tickets (0)   My responsibilities (0)   Tickets in My Queues (0)   Tickets in My Services (0) <b>All tickets (9)</b>				
	TICKET#	AGE	TITLE	
	2021012717000038	2 h 54 m	Maintenance Printer	
	2021012717000011	2 h 58 m	phone doesn't work	
 	2020050417000012	267 d 22 h	Installation KIX Start	

Figure: Filter options in a widget

### 3.1.3 Columns

#### **"Unread Article(s)" Column**

"Unread Article(s)" column shows new, unread articles for a ticket.




= New unread article(s)



= New unread article(s) for tickets for which you are the owner and/or responsible person

#### **"Priority" Column**

"Priority" column shows which priority a ticket has. It assigns following colored markings:

	Very low
	Low
	Medium
	High
	Very high

If "Priority" and "Unread article(s)" fields are red, ticket has reached escalation time.

#### **Information Columns**

Information columns show different information about tickets. It is possible to adjust which columns are shown and order in which they appear yourself.

- Call up settings: click  symbol in upper right area of widget.
- Settings options appear:

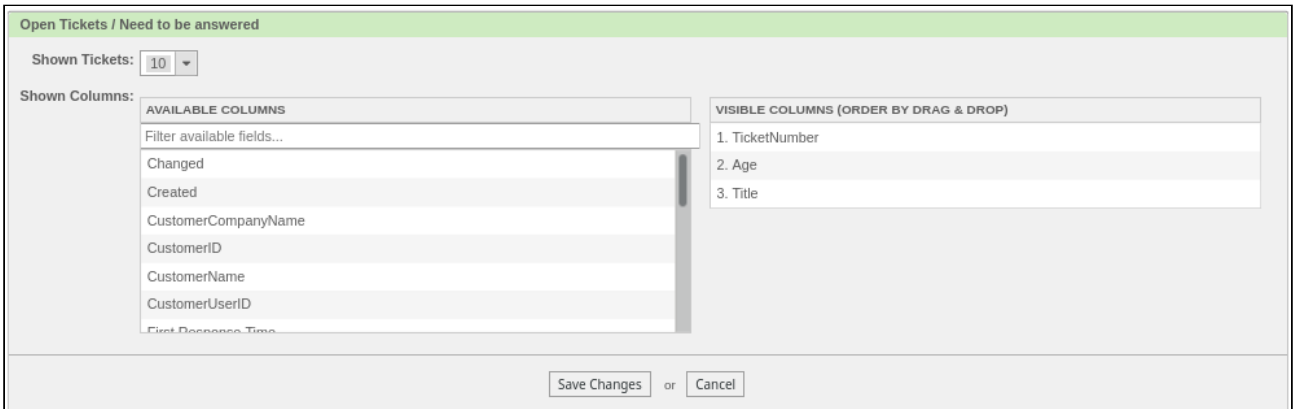


Figure: Information Column Settings

Use "Shown Tickets" to specify how many tickets are to be shown. Columns which are currently displayed in widget can be seen under "Visible Columns". Additional columns can be selected to be shown under "Available Columns".

- Drag desired column and drop it into "Visible Columns" area

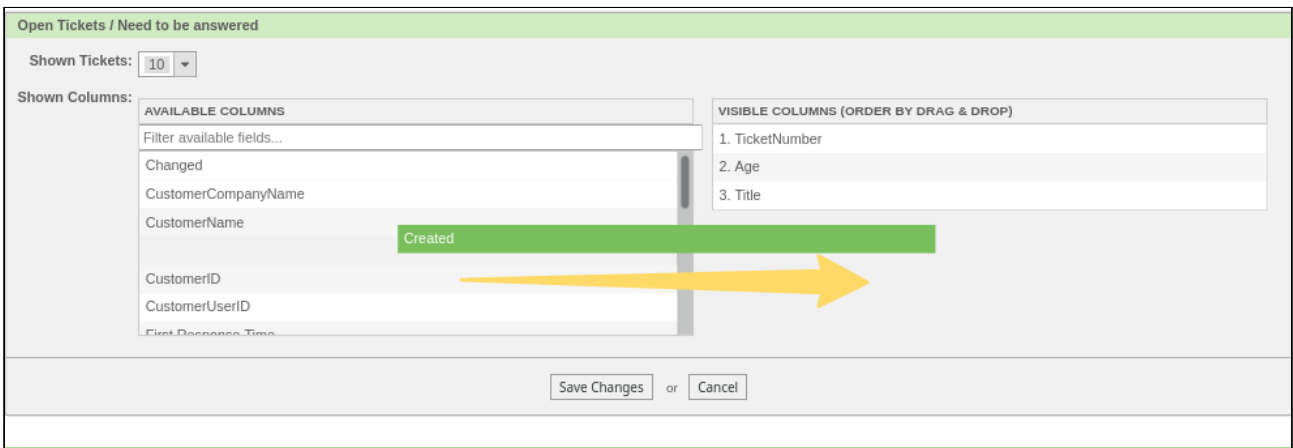


Figure: Information Column Settings


Order of visible columns can be changed.

- Drag and drop column to desired position.
- Click "Save changes" button.



### 3.1.4 Sidebar

Sidebar with additional widgets is located to right. Use "Settings" widget to specify widgets to be shown in contents area and sidebar.

- To open "Settings" widget, click  symbol.
- "Settings" widget expands.

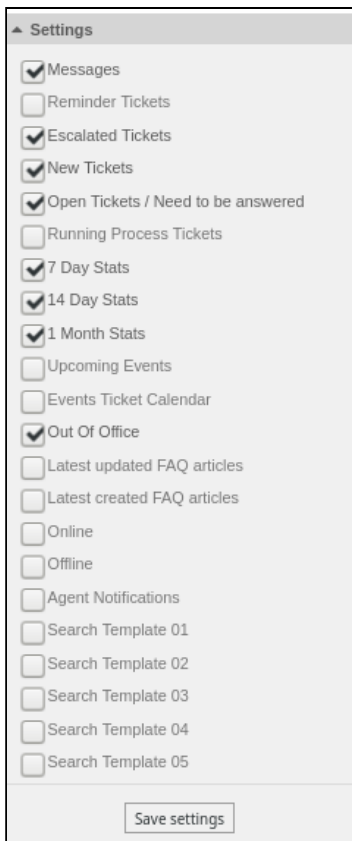


Figure: "Settings" Widget

- Mark widgets to be shown.
- Click "Save settings" button.
- "Settings" widget closes and display in dashboard appears, having been adjusted to your settings.

### 3.1.5 Displayable Widgets

- "Escalated Tickets" widget shows all tickets which have reached escalation time.
- "New Tickets" widget shows all new tickets with "open" state type.
- "Open Tickets / Need to be answered" widget shows all tickets with "open" state type.
- "Reminder Tickets" widgets shows all tickets which have reached pending time.
- "Stats" widget shows information about created and locked tickets. Period can be specified.

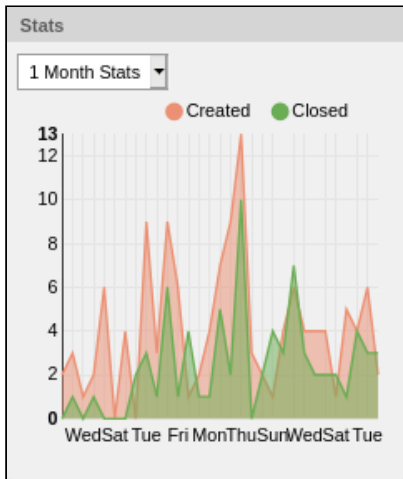


Figure: "Stats" widget

- "Upcoming Events" widget shows escalating or pending tickets in brief.
- "Latest created FAQ articles" widget shows title, queue, and date of most recently created FAQ article(s).
- "Latest updated FAQ articles" widget shows title, queue, and date of most recently updated FAQ article(s).
- "Online" widget shows which agents and contacts are currently logged into KIX.
- "Offline" widget shows which agents are currently not logged into KIX.
- "Agent Notifications" widget shows specific notifications for specific events. For example, additional notifications can be shown when tickets are escalated.

**Please note**

Agent notifications are deactivated by default. To display agent notifications, different settings in the Admin area are to be implemented by a KIX administrator.



**Upcoming Events**

2021012717000029 meeting  
(Reminder Reached in 3 d 21 h )

**Latest updated FAQ articles**

Fire or smoke development  
Sicherheit - 01/27/2021 13:25  
Telephone System  
Misc - 01/27/2021 13:23  
E-Mail Signatur bearbeiten  
Misc - 04/21/2020 07:20

**Latest created FAQ articles**

Telephone System  
Misc - 01/27/2021 13:23  
Testticket für FAQ  
Misc - 01/25/2017 09:59  
Fire or smoke development  
Sicherheit - 01/27/2021 13:25

**Online**

Agents (1) Customers (0)

John Smith

**Offline**

Thomas Fröhlich (tf@meinefirma.de)  
Michael Hofman (hofman@beispiel.de)  
Admin KIX (root@localhost)  
Max Mustermann  
(max.muster@mustermann.com)  
Hans Müller (fake@fake.com)

**Agent Notifications**

none

Figure: examples for displayable widgets

## 3.2 Module: Tickets

The "Tickets" module offers access to the most important tasks in KIX. The module functions allow you to call up different ticket views, create new tickets, and search by tickets.

- Click "Tickets" menu item in menu bar.
- Selection menu expands.

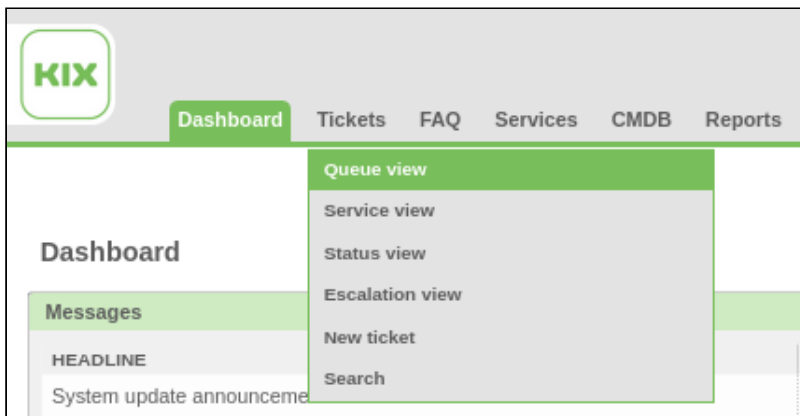


Figure: Tickets Module, Selection Menu

Select a function in selection menu:

- Queue view
- Service view
- Status view
- Escalation view
- New ticket
- Search

### **Ticket State**

A ticket always has a defined state. All default ticket states are listed below. If need be, individual ticket states can be defined in the Admin area.

State	Meaning
closed unsuccessful	A contact has created a request which was not successfully edited. This transaction is closed and will be filed under "closed unsuccessful".



State	Meaning
closed successful	A contact has created a request which was successfully edited. This transaction is closed and will be filed under " <i>closed successful</i> ".
open	The ticket is being edited by an agent.
closed with workaround	A contact has addressed a request in which the incident has been rectified; however, the cause of the problem could not be found or addressed.
pending auto close-	A contact has made a request. The request was not successfully edited. It is possible that the contact will report back again. The ticket is set to " <i>pending auto close-</i> ". If the customer does not report back by a defined time, the ticket will at this point be closed automatically.
pending auto close+	Just as with " <i>pending auto close-</i> ", the ticket is closed following a defined period, but in this case, successfully.
pending reminder	This state means you receive a reminder email for the process. This is useful, for example, if: <ul style="list-style-type: none"><li>• contact could not be reached</li><li>• a deadline must be adhered to</li></ul> You can specify the time period in the reminder email.
pending auto reopen	The ticket is locked in this period, i.e. until reminder, and therefore not visible for other owners. If the date of the reminder has been reached, ticket will be released and will automatically have " <i>open</i> " state.
new	This state is assigned to all new tickets which do not yet have an owner.
merged	This state is assigned to tickets which have been merged with other tickets to form a new ticket.

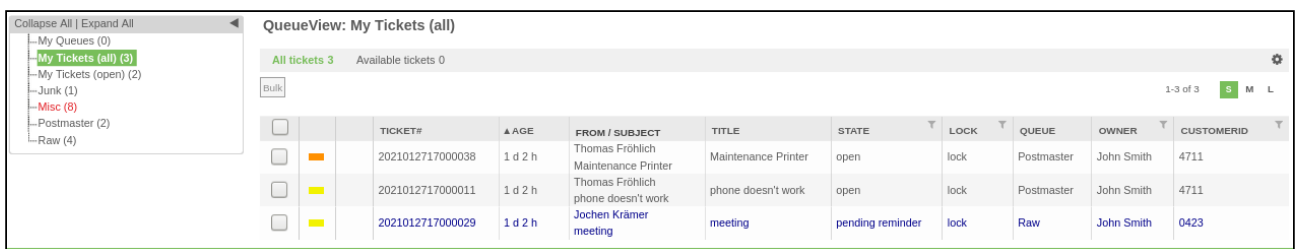
## 3.2.1 Ticket Views

KIX offers different ticket views in which tickets are listed according to criteria, in tables.

In the overview lists for tickets you will only see tickets to which you have write access. If tickets with read rights or empty queues should also be displayed here, please contact your admin.


### 3.2.1.1 Small View

Tickets are shown in a table as simple, configurable rows. It is possible to determine via settings which columns with information are to be shown for individual tickets. Columns can be sorted or filtered.




	TICKET#	AGE	FROM / SUBJECT	TITLE	STATE	LOCK	QUEUE	OWNER	CUSTOMERID
<input type="checkbox"/>	2021012717000038	1 d 2 h	Thomas Fröhlich Maintenance Printer	Maintenance Printer	open	lock	Postmaster	John Smith	4711
<input type="checkbox"/>	2021012717000011	1 d 2 h	Thomas Fröhlich phone doesn't work	phone doesn't work	open	lock	Postmaster	John Smith	4711
<input type="checkbox"/>	2021012717000029	1 d 2 h	Jochen Krämer meeting	meeting	pending reminder	lock	Raw	John Smith	0423



Figure: Ticket QueueView, Small

If multiple rows are marked with  , bulk action can be carried out on marked tickets using "Bulk" button.


### Filtering Columns

- Click  symbol.
- Select a filter option.
- Files will be displayed according to filter.

### Sorting Columns in Ascending/Descending Order

- Left-click  /  symbol.
- Rows will be displayed in ascending or descending order.

### Calling up Settings

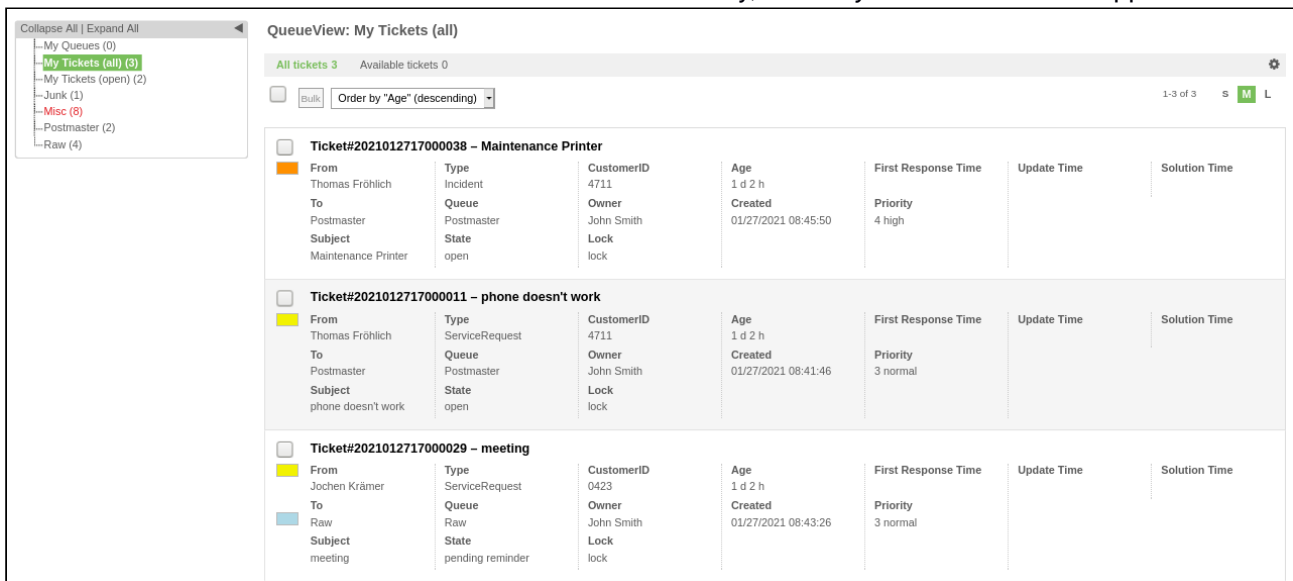
- Click  symbol in upper right widget edge.
- View settings window will open.
- In settings, select following:
  - Tickets per page: select number of tickets to be shown per page.
  - Available Columns: all available columns are listed here.
  - Visible Columns: All columns which are shown when view is called up are listed here.
- Click "Submit" button.

- View will appear in accordance with your specifications.

### 3.2.1.2 Medium View

The tickets are shown with some details. You can now see the priority of the ticket below the checkbox of the respective ticket. The status of the ticket can be found in the colored box below the priority. If you move the mouse pointer over a line, the ticket actions appear.

Read more about this in section on *"Ticket actions"*. Additionally, *"Order by ..."* selection menu appears.



From	Type	CustomerID	Age	First Response Time	Update Time	Solution Time
Thomas Fröhlich	Incident	4711	1 d 2 h			
Postmaster	Queue	Owner	Created	Priority		
Postmaster	Postmaster	John Smith	01/27/2021 08:45:50	4 high		
Maintenance Printer	open	Lock				
		lock				
Thomas Fröhlich	ServiceRequest	4711	1 d 2 h			
Postmaster	Queue	Owner	Created	Priority		
Postmaster	Postmaster	John Smith	01/27/2021 08:41:46	3 normal		
phone doesn't work	open	Lock				
		lock				
Jochen Krämer	ServiceRequest	0423	1 d 2 h			
Raw	Queue	Owner	Created	Priority		
Raw	Raw	John Smith	01/27/2021 08:43:26	3 normal		
meeting	State	Lock				
meeting	pending reminder	lock				

Figure: Ticket QueueView, Medium

### Ordering Tickets

- Click "Order by "Age" (ascending)" button.
- Click one of the filter options.
- Tickets will be displayed and ordered according your selection.

### 3.2.1.3 Large View

The tickets are displayed with more details and an article preview. You can see the priority of the ticket below the checkbox of the respective ticket. The status of the ticket can be found in the colored box below the priority. If you move the mouse pointer over a line, the ticket actions appear.

Read more about this in section on "Ticket actions".

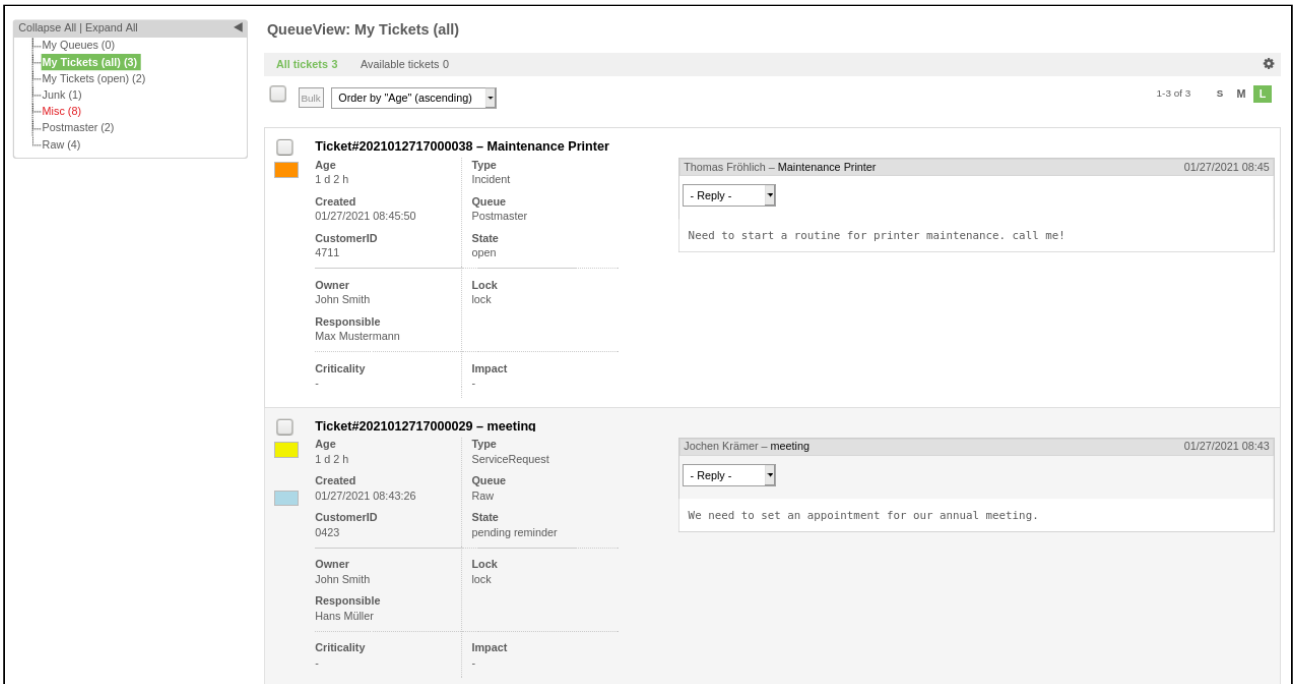


Figure: Ticket QueueView, Large

### 3.2.1.4 Queue View

Selecting the "View by Queues" module function takes you to the queue view for "My Queues". In this view you can see an overview of all the queues in the system with all the tickets classified under them.

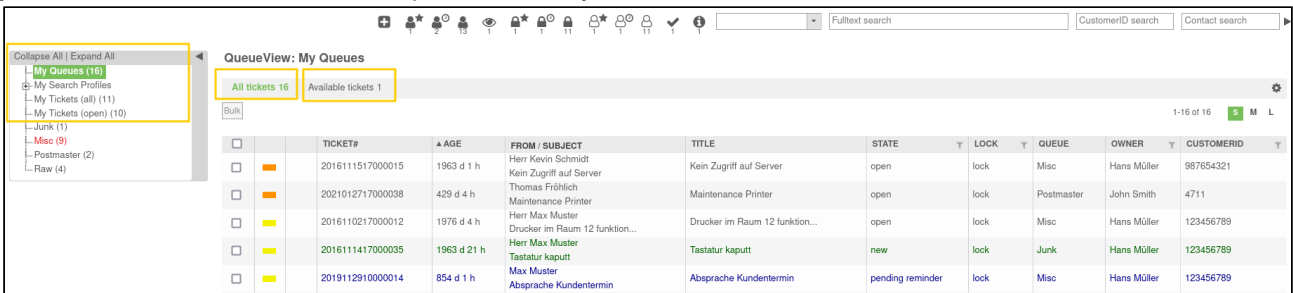


Figure: Ticket QueueView

On the left is a collapsible/expandable selection menu. Here you can see all the queues created in the system and the categories "My queues", "My tickets (all)", "My tickets (open)" and "My search templates" (if search templates have been created).

- "My Queues" includes all tickets in the queues that have been assigned to "My Queues" in the personal settings.
- "My Tickets (all)" contains all tickets that you are currently processing (processor).
- "My Tickets (open)" contains all tickets with the status type "open" that you are currently processing.



- "My sSarch Profiles" contains all tickets of a saved search template. For more information on creating search templates, see the "Searching for tickets" chapter.

The first number after the queue name is the number of all available tickets within this queue and all sub-queues. The second number is the total number of tickets within this queue and all subqueues.

Queues can consist of any number of subqueues. Subqueues can be created by an administrator.

**Note**

The overview by queues or by tickets in queues is based exclusively on the queues for which the agent has authorization. If there is no authorization, the agent does not have access to the queue and ticket!

**Selecting a Queue / Sub-Queue or Category**

- Click a queue or category in selection menu.
- Selected view opens.

	TICKET#	AGE	FROM / SUBJECT	TITLE	STATE	LOCK	QUEUE	OWNER	CUSTOMERID
<input type="checkbox"/>	2021012717000038	1 d 2 h	Thomas Fröhlich Maintenance Printer	Maintenance Printer	open	lock	Postmaster	John Smith	4711
<input type="checkbox"/>	2021012717000011	1 d 2 h	Thomas Fröhlich phone doesn't work	phone doesn't work	open	lock	Postmaster	John Smith	4711
<input type="checkbox"/>	2021012717000029	1 d 2 h	Jochen Krämer meeting	meeting	pending reminder	lock	Raw	John Smith	0423

Figure: Ticket QueueView, Small

Symbols **S**, **M**, **L** and are in upper right area.

**S** See ticket view in small format

**M** See ticket view in medium format

**L** See ticket view in large format

Calling up view settings

### 3.2.1.5 Service View

Service view lists all tickets linked with a service, for services defined in personal settings as "My Services".

**Ansicht nach Services: Meine Services**

Alle Tickets 2    Verfügbare Tickets 2

Sammelaktion 1-2 von 2 **S** M L

<input type="checkbox"/>	TICKET#	▲ ALTER	TITEL	STATUS	SPERREN	QUEUE	BESITZER	KUNDENNUMMER	SERVICE
<input type="checkbox"/>	2016110217000012	22 d 23 h	Drucker im Raum 12 funktion...	neu	gesperrt	Misc	Hans Müller	123456789	Gerätewartung
<input type="checkbox"/>	2016112317000018	1 d 20 h	Gerätewartung	offen	gesperrt	Misc	Hans Müller	123456789	Gerätewartung

KIX 16.0.7-0 Zum Anfang der Seite

Figure: Service view

### 3.2.1.6 Status View

Status view lists all tickets with an "open" or "closed" state type.

**Status View: Open tickets**

Open tickets 173    Closed tickets 25

Bulk New widespread incident Assign Tour 1-25 of 173 - Page: 1 2 3 4 5 >> >| **S** M L

<input type="checkbox"/>	TICKET#	▼ AGE	FROM / SUBJECT	TITLE	STATE	LOCK	QUEUE	OWNER	CUSTOMERID
<input type="checkbox"/>	2021012617000031	1 d 20 h	Anke Friedmann new pictures arrived	new pictures arrived	open	lock	Postmaster	Hans Müller	342353245
<input type="checkbox"/>	2021012617000021	1 d 20 h	mustermann@cape-it.de problem detection	problem detection	open	lock	Postmaster	Hans Müller	mustermann@c...
<input type="checkbox"/>	2021012617000012	1 d 23 h	Anton Müller Maintenance Printer	Maintenance Printer	open	unlock	Entscheidung	Hans Müller	MuellerUndSo...
<input type="checkbox"/>	2020111217000012	77 d 2 h	Anke Friedmann Wartungsauftrag Laser TruMi...	Wartungsauftrag Laser TruMi...	open	lock	Projekte	Max Mustermann	342353245
<input type="checkbox"/>	2020101517000027	105 d 12 h	Tägliche Wartung	Maintenance: Stempelmaschin...	open	unlock	Raw	Hans Müller	

Figure: Status View

### 3.2.1.7 Ticket Escalation View

Ticket Escalation View lists all tickets which will shortly escalate (today/tomorrow/next week).

**Ticket Escalation View: Today**

Today 3    Tomorrow 3    Next week 3

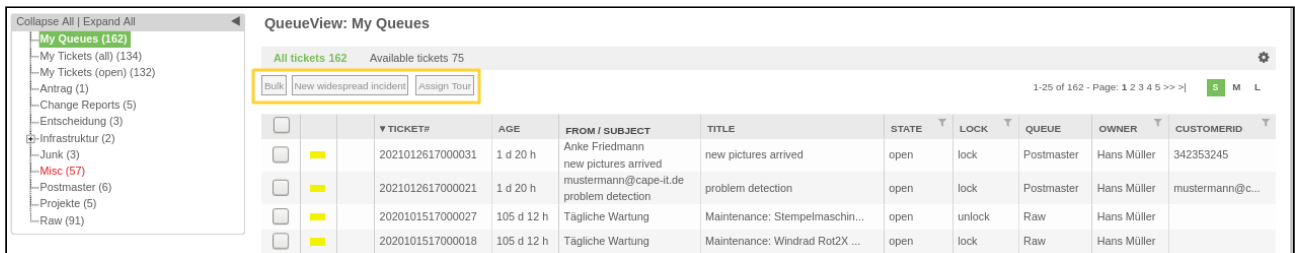
Bulk New widespread incidents Assign Tour 1-3 of 3 **S** M L

<input type="checkbox"/>	TICKET#	AGE	FROM / SUBJECT	TITLE	STATE	LOCK	QUEUE	OWNER	CUSTOMERID
<input type="checkbox"/>	2017112310000047	1161 d 19 h	Sabine Müller Gerätewartung Computer	Gerätewartung Computer	open	lock	Raw	Hans Müller	123456789
<input type="checkbox"/>	2018062710000011	945 d 23 h	Heinz Becker Der Drucker ist jetzt auch ...	Smartphone ist kaputt	processing	lock	Raw	Hans Müller	123abc
<input type="checkbox"/>	2018070510000015	938 d 1 h	Heinz Becker Mein Telefon ist kaputt	Mein Telefon ist kaputt	processing	lock	Postmaster	Hans Müller	123abc

Figure: Ticket Escalation View

### 3.2.2 Ticket actions in lists

A number of ticket actions are available in QueueViews. You can find these ticket actions above the ticket list. Please note that "New widespread incident" and "Assign tour" ticket actions are only available if the corresponding module or package is installed.



The screenshot shows the 'QueueView: My Queues' interface. At the top, there are buttons for 'Bulk', 'New widespread incident', and 'Assign Tour'. Below these is a table of tickets with columns for Ticket#, Age, From/Subject, Title, State, Lock, Queue, Owner, and CustomerID. The first four rows of the table are visible, showing various ticket statuses and subjects.

	TICKET#	AGE	FROM / SUBJECT	TITLE	STATE	LOCK	QUEUE	OWNER	CUSTOMERID
<input type="checkbox"/>	2021012617000031	1 d 20 h	Anke Friedmann new pictures arrived	new pictures arrived	open	lock	Postmaster	Hans Müller	342353245
<input type="checkbox"/>	2021012617000021	1 d 20 h	mustermann@cape-it.de problem detection	problem detection	open	lock	Postmaster	Hans Müller	mustermann@c...
<input type="checkbox"/>	2020101517000027	105 d 12 h	Tägliche Wartung	Maintenance: Stempelmaschin...	open	unlock	Raw	Hans Müller	
<input type="checkbox"/>	2020101517000018	105 d 12 h	Tägliche Wartung	Maintenance: Windrad Rot2X ...	open	lock	Raw	Hans Müller	

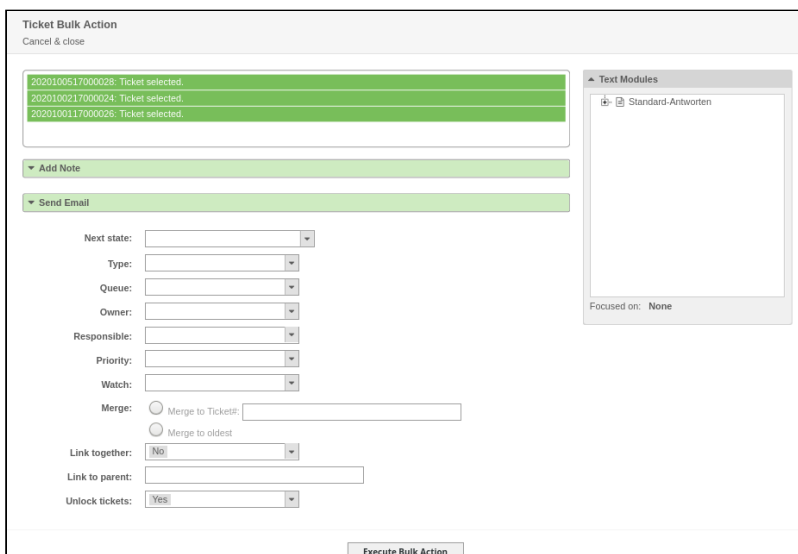
Figure: Ticket Actions Within a QueueView

First, use  to mark tickets in list for which ticket action is to be carried out.

### 3.2.2.1 "Bulk" Button

Bulk action for tickets offers option to apply the following to marked tickets:

- Add notes
- Send emails
- Change state
- Change ticket type
- Change queue
- Change owner/responsible person
- Change priority
- Change watch: To observe or not to observe the marked tickets.
- Merge to one ticket number
- Link marked tickets with each other
- Link marked tickets with parent ticket
- Unlock tickets



**Ticket Bulk Action**  
Cancel & close

2020100517000026: Ticket selected.  
2020100217000024: Ticket selected.  
2020100117000026: Ticket selected.

▼ Add Note

▼ Send Email

Next state:

Type:

Queue:

Owner:

Responsible:

Priority:

Watch:

Merge:  Merge to Ticket#:   
 Merge to oldest

Link together:

Link to parent:

Unlock tickets:

Execute Bulk Action

Text Modules  
Standard-Antworten  
Focused on: None

Figure: Ticket Bulk Action Dialog

### 3.2.2.2 Multiselect for Complex Lists

For ticket lists which have several pages due to the number of tickets, there is option to perform multiselect. Here it is possible to select all tickets on a page, or all tickets on all pages.

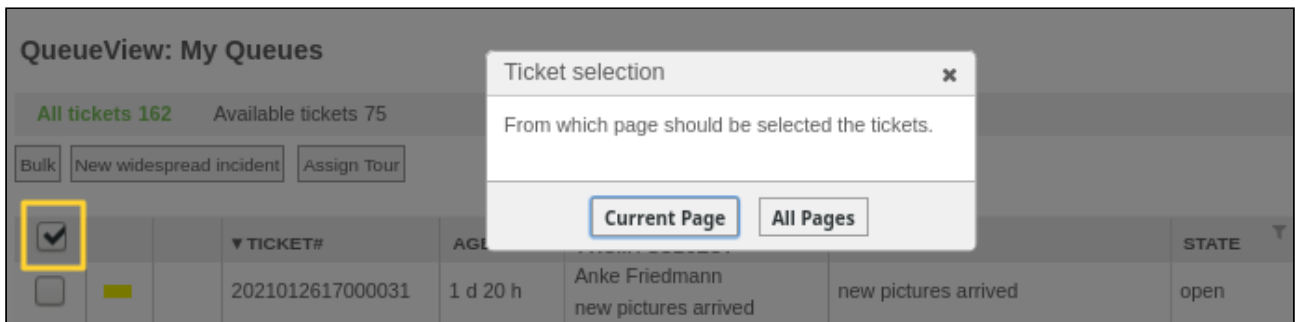


Figure: Ticket Selection over Several Pages

- Click  symbol in table header line to carry out multiselect of tickets.
- In "Ticket selection" pop-up, click "Current Page" or "All Pages" button.
- Tickets are now marked according to your selection.

Multiselect is used, for example, for a bulk action on many tickets. Checked tickets are locked for editing. While tickets are locked, a progress bar appears.

A greater number of checked tickets can lead to loss of performance. The following notification will appear:

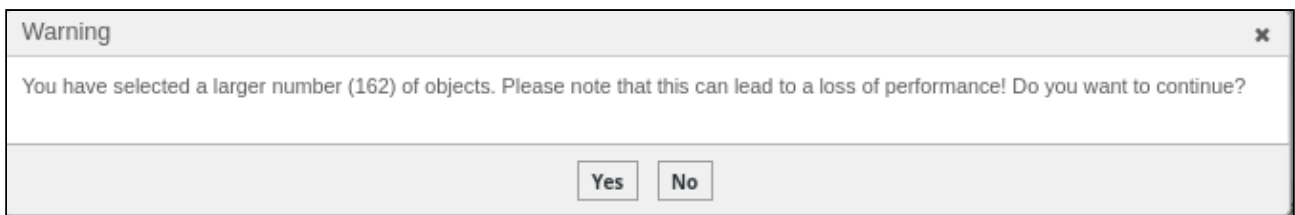


Figure: Warning If Large Number of Tickets Have Been Selected

### 3.2.3 Ticket Zoom View

Left-clicking a ticket in the view opens ticket zoom view.  
This allows you access to ticket actions and article actions.

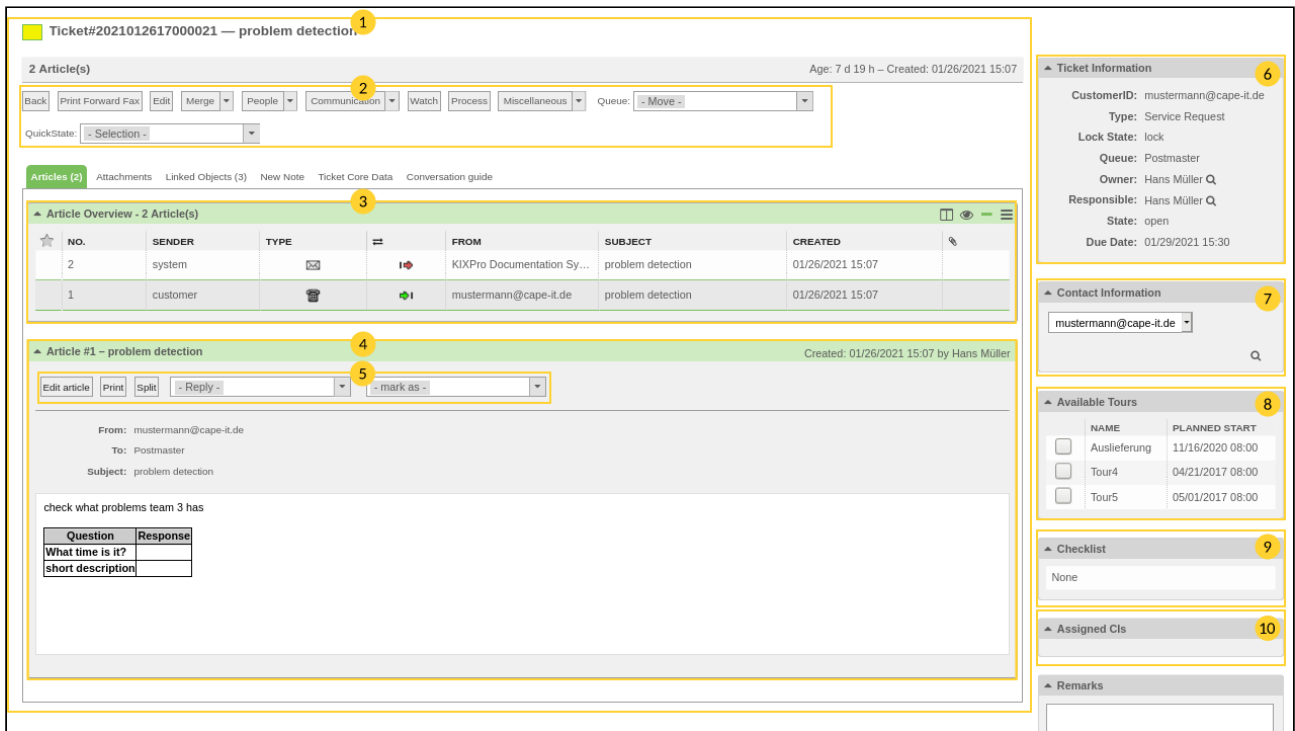


Figure: Ticket Zoom View - Example

1	Ticket contents
2	Ticket actions
3	Article overview
4	Article contents
5	Article actions
6	Ticket information
7	Contact information

8	Dynamic field
9	Checklist
10	Assigend CIs


Elements 6-10 can be ordered as desired.

## Sidebars


### Ticket Information

"Ticket Information" widget shows general information about ticket.

Clicking CustomerID opens Customer Information Center. Clicking Queue opens corresponding QueueView.

Clicking  symbol next to Owner or Responsible opens pop-up with information about owner or responsible person for ticket.

### Contact Information


Information about checked contact of ticket is shown here. A contact can be selected from list via drop-down menu. In default version, select between ticket customer (customer to which ticket is allocated) and customer who has composed at least one article for ticket. In personal preferences , additional linked persons can be selected.

Information about selected contact can be found under drop-down menu. Information shown can be modified in Admin area. References for standard searches related to customers can be found there.





Clicking  symbol next to contact information opens pop-up with information about customer.

### Checklist

Tasks related to ticket can be specified here.


Click  symbol to specify elements of list. Every line entered represents an individual list element.


Clicking a list element symbol (  /  /  /  ) allows for element state to be set.



-  = "ToDo"
-  = "Canceled"
-  = "In process"
-  = "Complete"

### Assigned CIs

Here are ConfigItems which are linked with contact (owner of ConfigItem). Depending on configuration in SysConfig, these can be contacts or customers.

Marking ConfigItem with  links it with ticket. Clicking ConfigItem opens new browser tab with information page of ConfigItem.

ConfigItems of a specific class can be selected and displayed via drop-down menu. List can be filtered according to specific attributes using  symbol next to drop-down menu.

A filter attribute can be added or removed using  /  symbols.

### Remarks

If necessary, ticket remarks can be made quickly and independently of articles here. Changes in this field are not documented and cannot be restored.

 **Note**

The "Dynamic Fields" sidebar, which is also available, is out of date and only part of the code. It has been replaced by the "Dynamic fields" tab and should NO longer be used. Simultaneous use of the "Dynamic Fields" sidebar AND the "Dynamic Fields" tab can lead to display and operating problems.



### 3.2.3.1 Ticket Actions

When opening a ticket in ticket zoom view, the buttons for ticket actions can be seen under the ticket title:

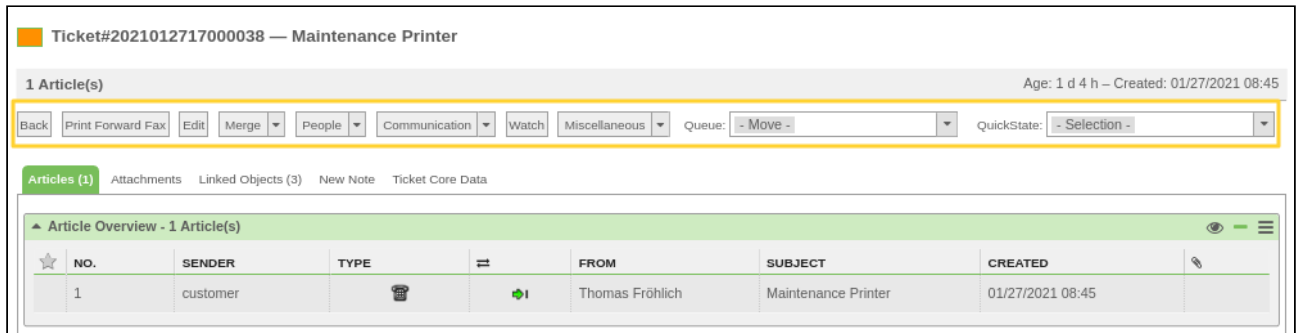



Figure: Ticket Actions

For fields with  , a selection of subordinate ticket actions open with a mouse-over.

- [Back](#) (see page 48)
- [Print forward Fax](#) (see page 48)
- [Edit](#) (see page 49)
- [Merge](#) (see page 50)
- [People](#) (see page 51)
- [Communication](#) (see page 53)
- [Pending](#) (see page 56)
- [Watch / Unwatch](#) (see page 56)
- [Close](#) (see page 57)
- [Spam](#) (see page 57)
- [Miscellaneous](#) (see page 57)
- [Queue: Move](#) (see page 59)
- [Status change: Selection](#) (see page 60)

#### Back

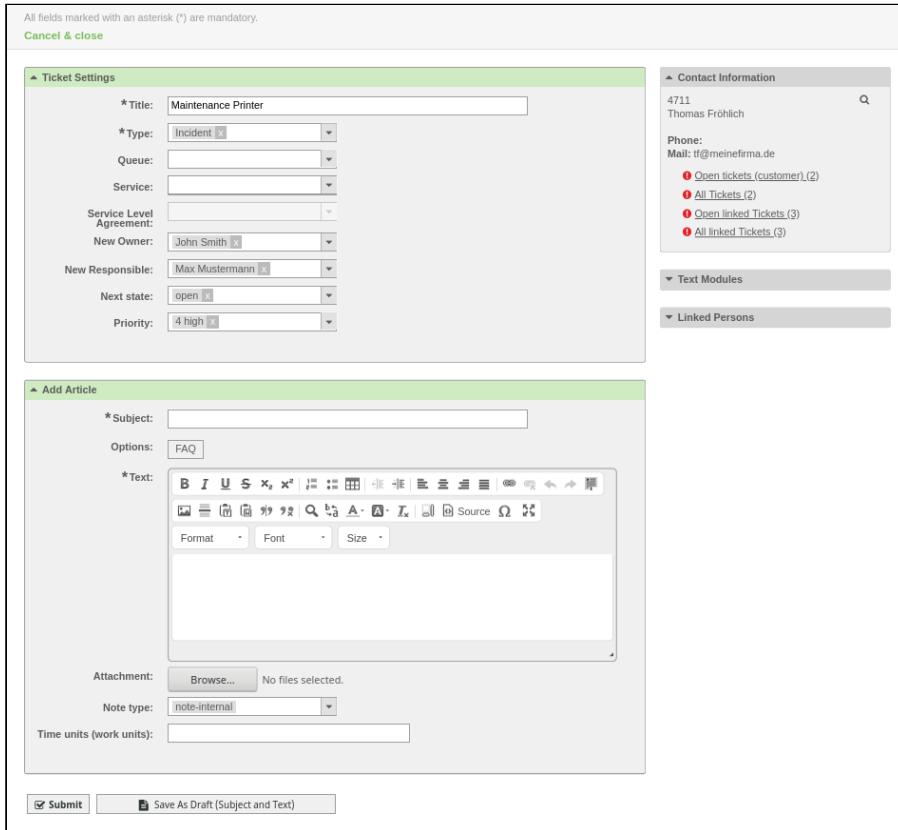
Back to previous ticket view.

#### Print forward Fax

Opens pop-up for selecting articles. You can create PDF document out of selected articles in fax format.

## Edit

Various options are available again within this function. In addition to the free text field in which you can save information, customer data relating to current ticket is also available here. Additional people can be "linked" here as well; they will receive notification regarding note. Communication can initially be saved as draft and, if needed, be reloaded. Draft will be deleted as soon as message is officially submitted.



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

**Ticket Settings**

\* Title: Maintenance Printer

\* Type: Incident

Queue:

Service:

Service Level Agreement:

New Owner: John Smith

New Responsible: Max Mustermann

Next state: open

Priority: 4 high

**Add Article**

\* Subject:

Options: FAQ

\* Text:

Attachment: Browse... No files selected.

Note type: note-internal

Time units (work units):

Submit Save As Draft (Subject and Text)

**Contact Information**

4711  
 Thomas Fröhlich

Phone:  
 Mail: tf@meinefirma.de

- Open tickets (customer) (2)
- All Tickets (2)
- Open linked Tickets (3)
- All linked Tickets (3)

Text Modules

Linked Persons

Figure: Editing Ticket

Text Modules: here you can use pre-defined text modules.

Linked Persons: select people who are to be linked with this ticket here, so they can follow current editing states.

## Merge

includes the sub-actions:

- Merge
- Merge customer tickets

### Merge

Multiple tickets can be merged to form one ticket here. In doing so all, articles from original ticket will be taken over into new overall ticket.

Original tickets will receive "merged" state and have merged note as only article content.

### **i** Information

Checklists are not taken over when summarizing. If ticket A is combined with ticket B and ticket A has a checklist, this is discarded. There is no summary of the values of both tickets in the checklist.

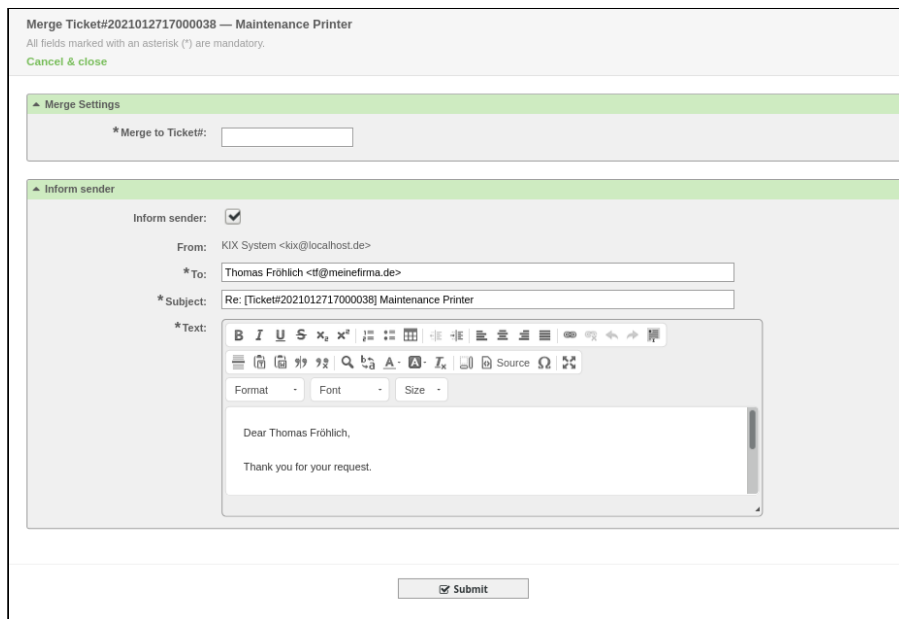


Figure: Merge Tickets Dialog

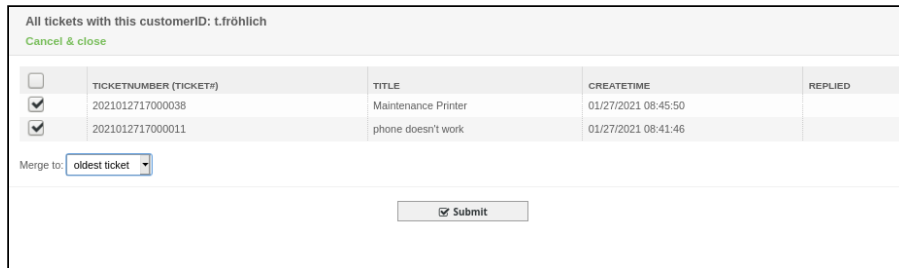
- **Merge to Ticket#:** Enter number of ticket which current ticket is to be merged with. Input is assisted with autocomplete search (options: \*\*\* all tickets or [number]\*).
- **Inform sender:** select if sender is to be informed of merging here.
  - **From:** enter name and email address of responsible person.

- **To:\*** name and email address of the customer who created the ticket is here. You can add additional people who are to receive a message about merging.
- **Subject:\*** subject for ticket merging can be entered here.
- **Text:\*** text to explain merging can be entered here.
- Click "Submit" button.
- Tickets are merged.

Fields with \* are mandatory.

### Merge Customer Tickets

Here you can summarize open tickets for a customer (login). The selected tickets can be combined to form the oldest, newest or current ticket.



	TICKETNUMBER (TICKET#)	TITLE	CREATETIME	REPLIED
<input type="checkbox"/>				
<input checked="" type="checkbox"/>	2021012717000038	Maintenance Printer	01/27/2021 08:45:50	
<input checked="" type="checkbox"/>	2021012717000011	phone doesn't work	01/27/2021 08:41:46	

Merge to:

Figure: Merge Customer Tickets Dialog

## People

includes the sub-actions:

- Owner
- Responsible
- Customer

### Owner

Owner of a ticket can be changed here. In doing so, new article of "note-internal" type will be created. "Subject" and "Text" input fields are mandatory.

**Change Owner of Ticket#2021012717000038 — Maintenance Printer**  
All fields marked with an asterisk (\*) are mandatory.  
Cancel & close

**Ticket Settings**

\*New Owner:  (Dropdown menu: Admin KIX, Hans Müller, John Smith, Max Mustermann, Michael Hofman, Thomas Fröhlich)

**Add Article**

\*Subject:  (Filters)

Options:

\*Text: 

**B I U S X<sup>2</sup> X<sup>3</sup>** **¶** **☰** **☲** **☱** **☴** **☵** **☶** **☷** **☸** **☹** **☺** **☻** **☼** **☽** **☿** **♈** **♉** **♊** **♋** **♌** **♍** **♎** **♏** **♐** **♑** **♒** **♓** **♈** **♉** **♊** **♋** **♌** **♍** **♎** **♏** **♐** **♑** **♒** **♓**

Format - Font - Size -

Attachment:  No files selected.

Note type:

Time units (work units):

Figure: Change Owner Dialog

Responsible

Responsible person of a ticket can be changed here. In doing so, new article of "note-internal" type will be created. "Subject" and "Text" input fields are mandatory.

**Change Responsible of Ticket#2021012717000038 — Maintenance Printer**  
All fields marked with an asterisk (\*) are mandatory.  
Cancel & close

**Ticket Settings**

\*Title:

New Responsible:  (Dropdown menu: Admin KIX, Hans Müller, John Smith, Max Mustermann, Michael Hofman, Thomas Fröhlich)

**Add Article**

\*Subject:

Options:

\*Text: 

**B I U S X<sup>2</sup> X<sup>3</sup>** **¶** **☰** **☲** **☱** **☴** **☵** **☶** **☷** **☸** **☹** **☺** **☻** **☼** **☽** **☿** **♈** **♉** **♊** **♋** **♌** **♍** **♎** **♏** **♐** **♑** **♒** **♓** **♈** **♉** **♊** **♋** **♌** **♍** **♎** **♏** **♐** **♑** **♒** **♓**

Format - Font - Size -

Attachment:  No files selected.

Note type:

Time units (work units):

Figure: Change Responsible Person Dialog

## Customer

Contacts from customer company can be changed here. Customer history is shown as well.

**Change Customer of Ticket#2021012717000038 — Maintenance Printer**  
All fields marked with an asterisk (\*) are mandatory.  
[Cancel & close](#)

\* Contact:  <tf@meinefirma.de>

\* CustomerID:

**▲ Contact Information**

4711  
Thomas Fröhlich

**Phone:**  
Mail: tf@meinefirma.de

- Open tickets (customer), (2)
- All Tickets (2)
- Open linked Tickets (3)
- All linked Tickets (3)

**Customer History:**

1-2 of 2 5 M L

	TICKET#	▼ AGE	FROM / SUBJECT	STATE	LOCK	QUEUE	OWNER	CUSTOMERID
	2021012717000038	1 d 5 h	Thomas Fröhlich Maintenance Printer	open	lock	Postmaster	John Smith	4711
	2021012717000011	1 d 5 h	Thomas Fröhlich phone doesn't work	open	lock	Postmaster	John Smith	4711

Figure: Change Customer Dialog

## Communication

includes the sub-actions:

- Phone call Outbound
- Phone call Inbound
- E-mail Outbound
- Empty mail

### Phone Call Outbound / Inbound

A phone call with customer can be documented here.

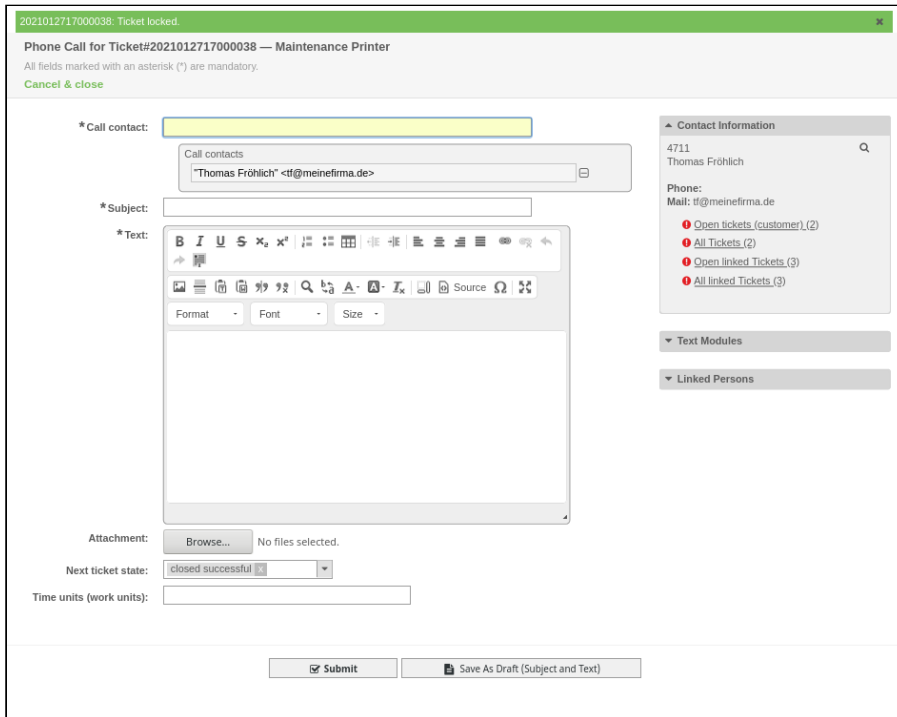


Figure: Phone Call Dialog

- **Call contact:** a contact can be entered here.
- **Subject:** a subject can be entered here.
- **Text:** contents of phone call can be entered as text here.
- **Attachment:** an attachment for this work step can be added here.
- **Next ticket state:** if need be, select a new ticket state here.
- **Pending date:** date and time for "Waiting..." or "Pending..." state can be given.
- **Time units (work units):** a duration for editing can be entered here.
- **"Text Modules" widget:** if need be, text module can be added to text here.
- **"Linked Persons" widget:** Using  in  column, people can be selected who will receive an email with contents of phone call. Using in column, this person can be set as call contact.

### E-mail Outbound

Email can be sent from ticket here. Unlike "Empty mail", article type is set to email-internal. Function is helpful for informing someone who has no access to ticket system.

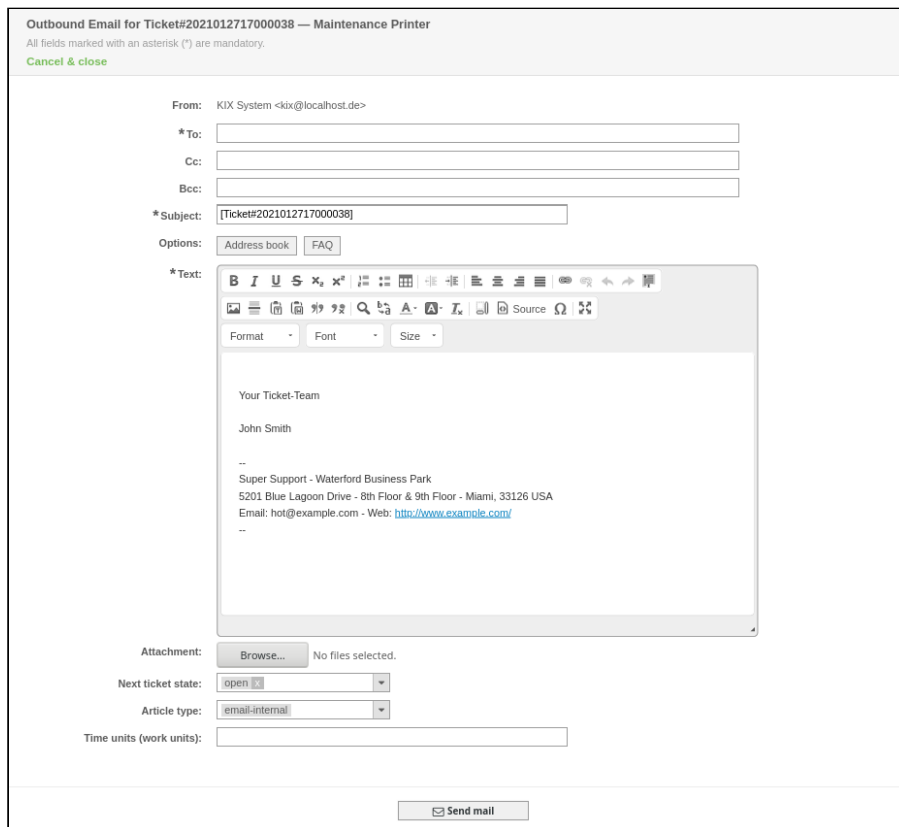


Figure: Email Outbound Dialog

### Empty mail

Just as with "Reply", an email can be sent here. Only difference to "Reply" article action is that in this case, fields are not pre-filled and do not relate to current article.



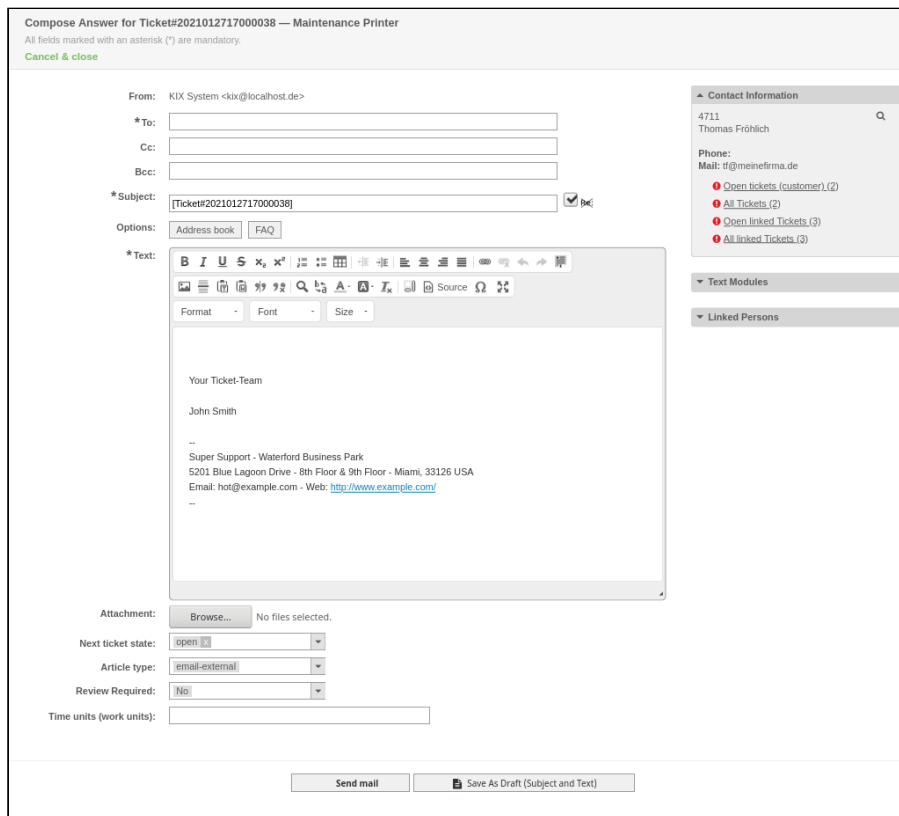


Figure: Empty Mail Dialog


## Pending

Different pending states for a ticket can be set here.

*Next state:* ticket state can be changed here. "Pending reminder" is pre-selected corresponding to ticket function.

*Pending date:* enter date and time until which ticket is to be postponed.

## Watch / Unwatch

Adds ticket to list of watched tickets. Ticket will then be shown in toolbar under  "Watched Tickets". Ticket action is not activated by default.

Removes ticket from list of watched tickets. Ticket action is not activated by default.



## Close

Closes ticket after editing.

*Next state:* select next ticket state after saving here.

*Review Required:* specify here if review is required.

## Spam

Incoming ticket can be marked as spam, if need be, here. This ticket action is deactivated by default.

## Miscellaneous

### Lock

Locks ticket for other agents. Ticket only editable by owner and responsible person.

### Unlock

Unlocks ticket for editing by other agents. Ticket action only appears if ticket is locked. This ticket action can be found in "*Miscellaneous*" drop-down menu.

### History

Gives overview of all work steps carried out on ticket. Each work step has comment, user information, and date.

### Print

Generates PDF or HTML document from entire ticket. This ticket action can be found in "*Miscellaneous*" drop-down menu.

Document contains following information:

- Ticket information
- Linked objects
- Information on customer and people involved
- Information on individual articles and corresponding text

### Free Fields

Opens dialog with ticket settings. Here you can change title, ticket type, and if need be, allocated service or SLA.

### Additional ITSM Fields

Additional ticket properties can be entered here. In "Title" field, enter new ticket title. Set checkmark next to property which is to be shown in ticket summary later. Following properties are available to choose from by default:

- Repair Start Time
- Recovery Start Time
- Due Date

After checking respective checkbox, specify date and time. Click on Submit to apply changes. Note that additional ITSM fields are for information purposes and do not fulfill a functional purpose. Following creation they appear in "Ticket Information" widget.

### Link

Calls up "Link Object" dialog. Ticket can be linked with other objects here. Possible objects can be other tickets, FAQ items, people, ConfigItems, or documents. This ticket action can be found in "Miscellaneous" drop-down menu.

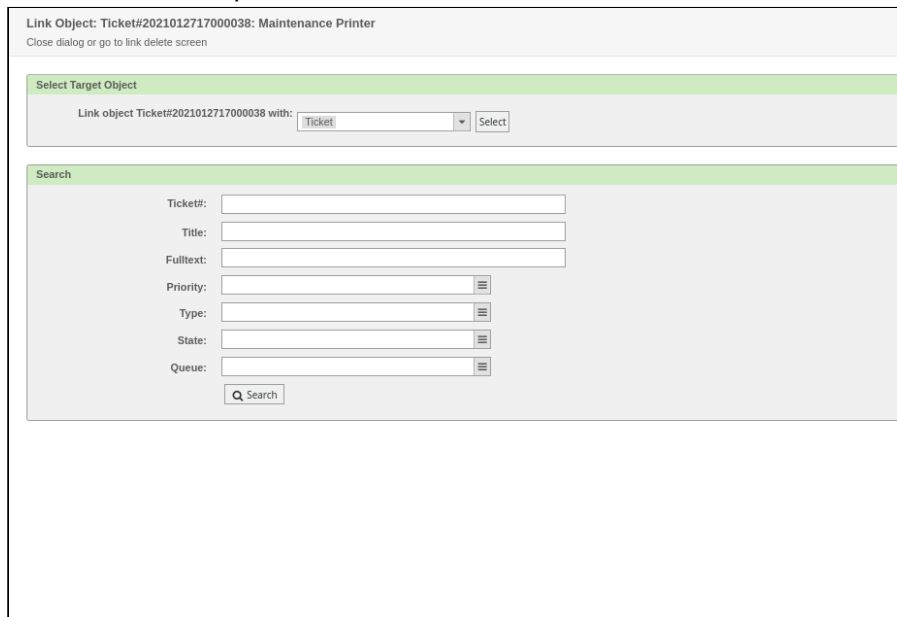


Figure: Link Object Dialog

- Select from list which object ticket is to be linked with.
- If need be, enter search criterion.
- Mark link with .
- Click "Select" button.
- Linked objects will now be displayed in "Ticket Information" widget.

### Decision

A decision and, if need be, an article can be added here.

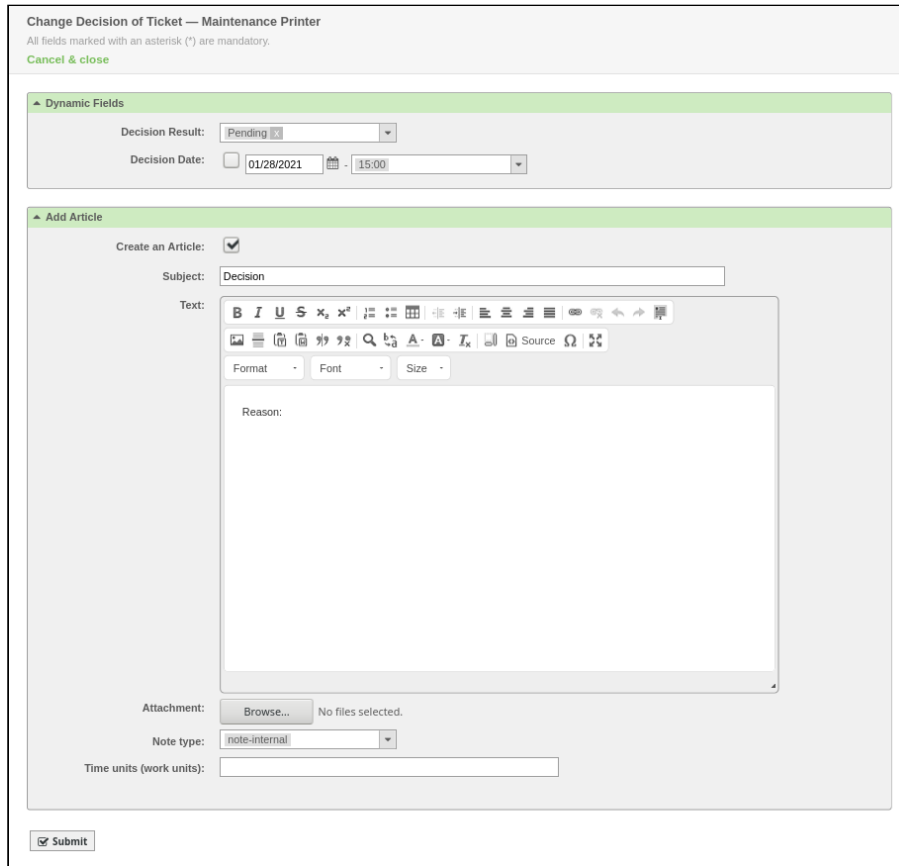


Figure: Decision Dialog

Decision Result: select result of adding decision here. You can select between:

- Approved
- Pending
- Postponed
- Pre-approved
- Rejected

Decision Date: select date and time when decision is to be applied to ticket.

To finish click "Submit" button.

### Queue: Move

Here you can move the ticket to another queue.

This field has three different appearance options: a button labeled "Move", a drop-down menu or an auto-complete field.

The appearance is set in the "Personal Settings" under "Queue selection method".



### Status change: Selection

Here you can assign a different status to the ticket. Depending on the configuration, an article is automatically created.

 **General Note**

From KIX 17.11: It is possible to upload several files at the same time in dialogs with the "Attachment" field.

### 3.2.3.2 Articles Tab

The "Articles" tab contains the article overview, corresponding article actions and the article content.

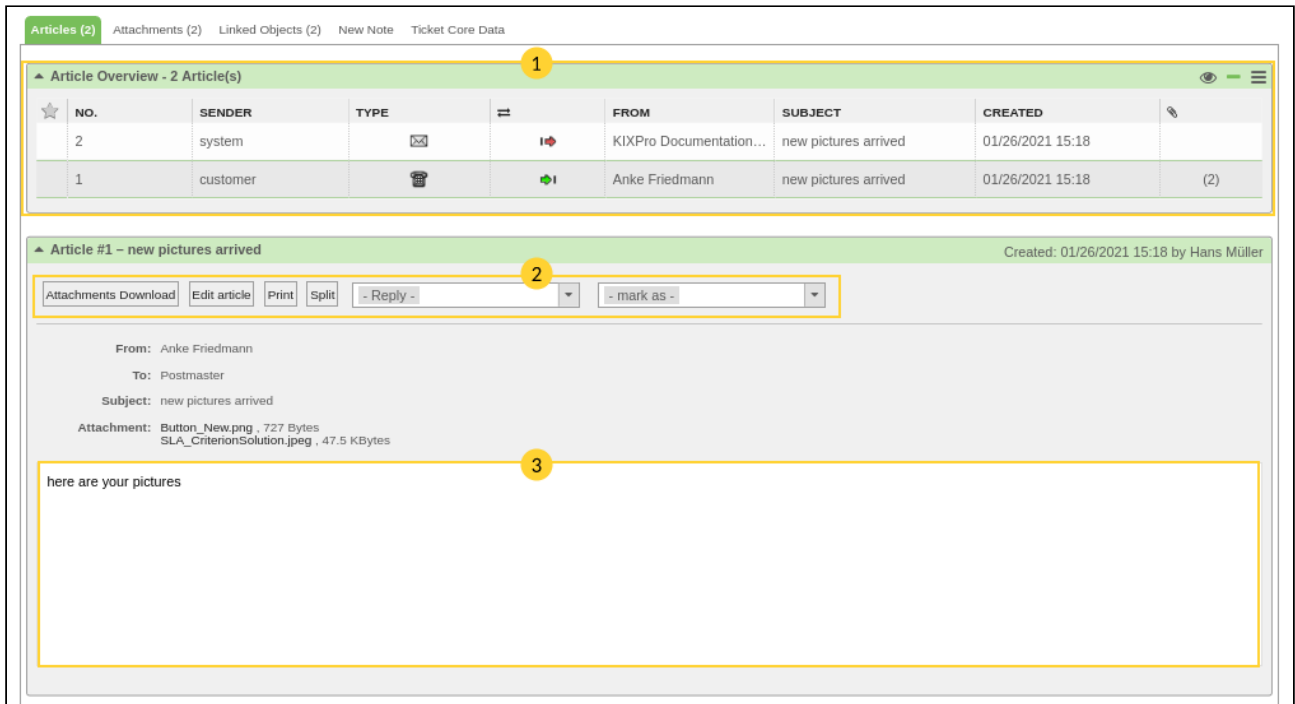
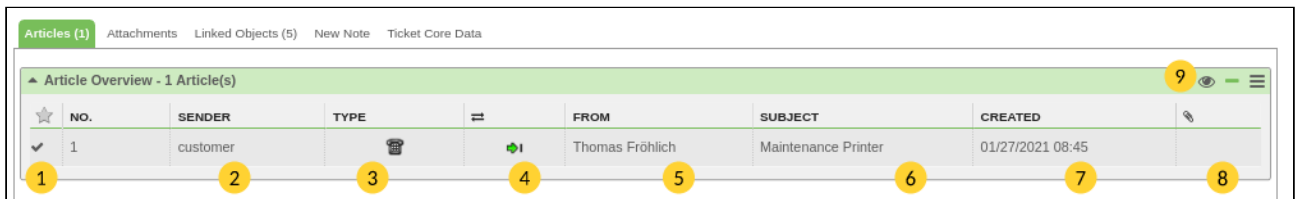


Figure: "Articles" tab

1	Article overview
2	Article actions
3	Article contents

## Article Overview

All work steps are listed below one another in article overview. Clicking a list entry displays article content under article overview.



NO.	SENDER	TYPE	FROM	SUBJECT	CREATED
1	customer	[Icon]	Thomas Fröhlich	Maintenance Printer	01/27/2021 08:45

Figure: Article Overview

1. Identification area for new, unread or marked as important articles and ToDo entries
2. Indication of whether a customer or an agent wrote the article
3. Item type: web request, phone call, note, etc.
4. Message type / direction: outgoing or incoming
5. Author of the article
6. Subject of the article
7. Creation date / time of the article
8. Attachments to the article
9. Buttons: open all / one article:



"Open an article"



"Open all articles"



"Mark all articles on the ticket as read"

Optionally, the page history or pagination can be found under these symbols. This can be configured by your admin.



NO.	SENDER	TYPE	FROM	SUBJECT	CREATED
2	customer	[Icon]	838@example.com	Good morning!	11/07/2022 11:59
1	customer	[Icon]	414@slow-company-example-sales.com	What a wonderful day!	11/07/2022 11:59

### Hint

The setting: "Open one / all articles" applies to all tickets. If the "Open all articles" option is active, this can lead to long loading times for large tickets with many articles.

## Article body

Clicking a line in article overview will display corresponding article content.

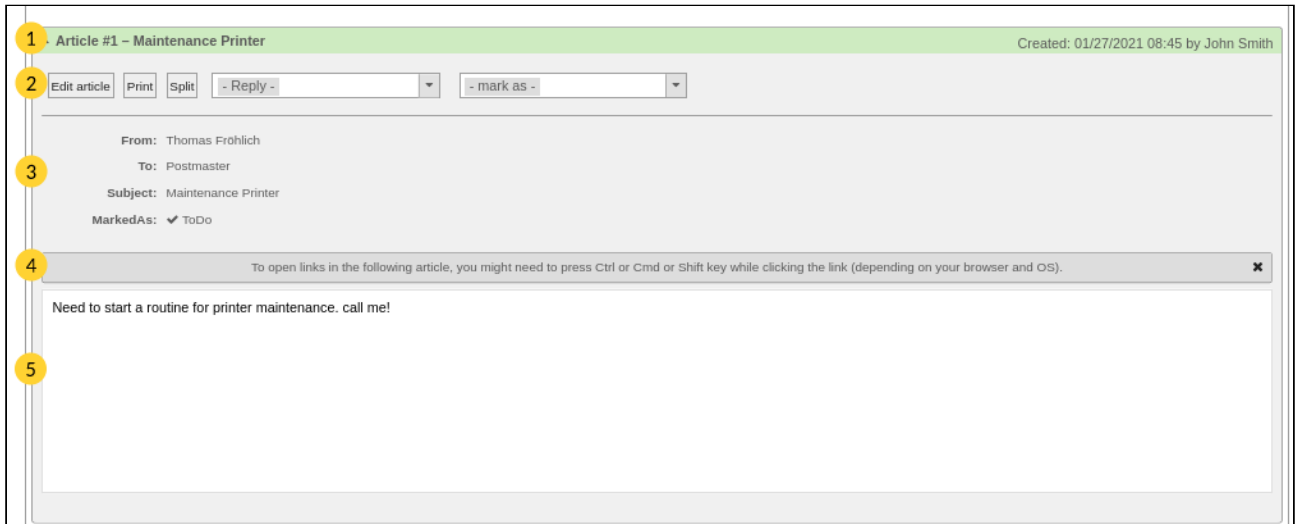


Figure: Article Contents

1	Article header
2	Article actions
3	Sending information
4	Help text
5	Article text





In terms of sending information, the following information can be seen for an article:

- Sender (From:)
- Recipient (To:)
- Recipient of a copy (CC:)
- Recipient of a blind copy (BCC:) \*
- Subject
- Attachments (if any)
- Markings (if any)
- Dynamic fields (if correspondingly configured)









\*optional






### Article identifications


	= New, unread articles in tickets where you are owner and/or responsible
	= New, unread articles
	= "ToDo" marking
	= "Important" marking

### Meaning of Background Colors in Table Row in Article Overview

	= Outgoing call from agent
	= External outgoing email from agent
	= Internal email
	= Internal note
	= External note
	= Messages generated by system
	= Article of contact
	= Color when hovering over an article

### Article Types

	Web request
	Internal*/external** note
	Call

	Email notification
---	--------------------

\*Note only visible for agents

\*\*Note visible for agents and customers

### Message Type and Direction

	Outgoing message (relevant articles are highlighted with green background)
	Incoming message (relevant articles are highlighted with blue background)
	Internal message (relevant articles are highlighted with red background)

If need be, background colors can be deactivated. Read more about this in section on "*Personal Preferences*".

## Article Actions

Article actions are located above the sender information.



Figure: Example for Article Actions

Depending on article type, the article actions are as follows:

- Forward
- Bounce
- Split
- Print
- Edit
- Download attachments
- Mark as ToDo/Important
- Reply/Reply to note
- Reply All

### Reply

This article action is for replying to an article. It is possible to use reply template or empty answer.

- Select one of the options from drop-down menu.
- New window for composing reply opens.



- *Text*: enter response text here. Customary formatting options are available.
- *Attachment*: if need be, add an attachment to response.
- *Next ticket state*: if need be, specify new ticket state here.
- *Pending date*: if need be enter date and time for "Pending..." state here.
- *Article type*: specify whether article is to be internal or external email.
- *Review Required*: if need be, specify here if review is required.
- *Time units*: specify how much time is required for editing here.

### **Sidebar: Text modules**

*Text Modules*" widget allows pre-configured text modules to be added to text.

- Select one of the options from drop-down menu.
- Click "Paste" button to add text module, or "Review" button to preview text module.
- Text module will be inserted in current cursor position in article text.

### **Sidebar: Linked persons**

Use "*Linked Persons*" widget to add persons to be involved in article reply.

In the drop-down menu next to name, select one of following options: To, Cc, or Bcc.

Person will be entered in corresponding input field.

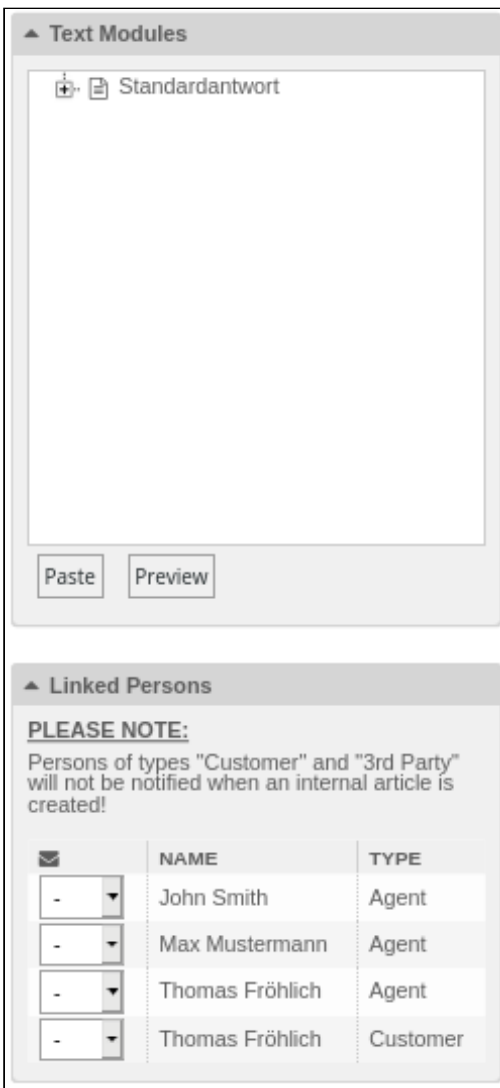


Figure: "Text Modules" and "Linked Persons" Widgets

### Sidebar: Attachments

Use "Attachments" widget to add attachments already used in ticket to article.

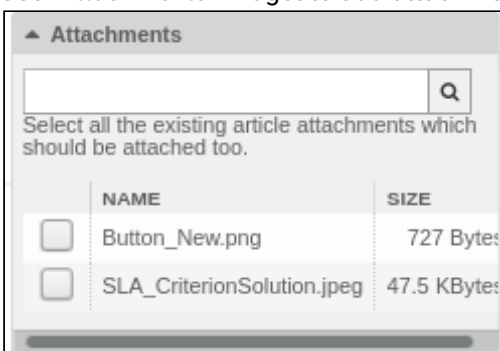





Figure: "Attachments" Widget

- Use  to mark an element from list.
- Attachment will be added to article.

### **Reply all**

Automatically takes over Cc line of article to be responded to. Function and options identical to "Reply" article action.



### **Mark as**

Articles can be marked as "ToDo" or "Important" here. Tickets containing articles with this marking can be called up quickly in toolbar using  or  symbols. It is also possible to search for articles with these markings in ticket search. Only owner and responsible person for ticket may add a marking by default.

Markings are only visible for creator of marking.



Figure: Add ToDo Marking Dialog

Marked articles are shown in article overview with corresponding  or  symbols.

Click one of the symbols to show details of marking, edit marking, or delete marking.

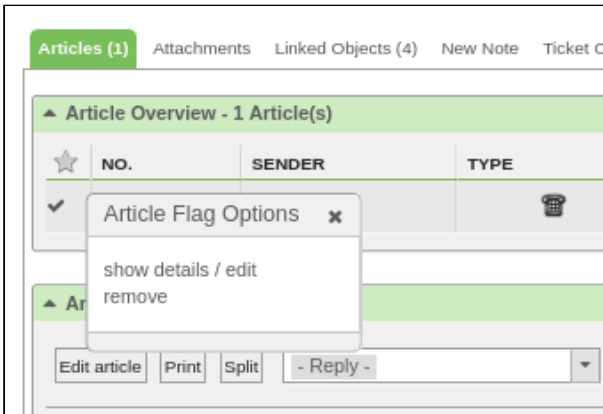


Figure: Editing Article Marking

### Print

Article can be printed in PDF or HTML format here.

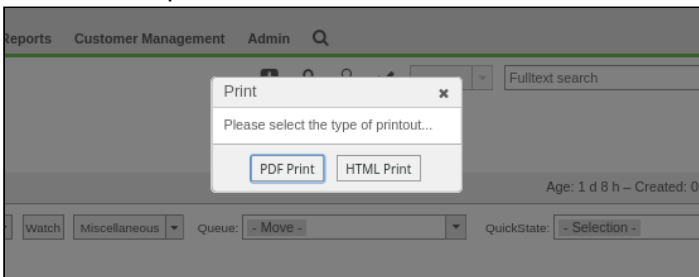


Figure: Printing Article Dialog

### Editing article

Article action allows all internal articles and notes to be edited. The following fields are available: "Created" / "Subject" / "Text" and "Attachment". Function also offers option to copy article, move it, or delete it.



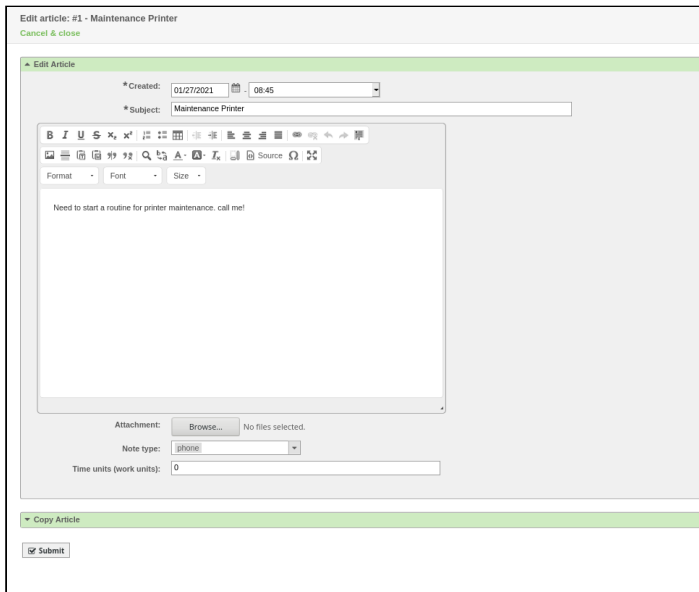


Figure: Editing Article Dialog

## **Split**

Use this article action to create new ticket from an article. Click "Split" button to open "Create new ticket" dialog.

### Create new ticket

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

Ticket-Template selection:

\* Type:

\* Contact:

CustomerID:

\* To queue:

Service:

Service Level Agreement:

Owner:

Responsible:

\* Subject:

Options:

\* Text:

Need to start a routine for printer maintenance. call me!

Attachment:  No files selected.

\* Next ticket state:

Pending date:

For all pending\* states.

Impact:

\* Priority:

Due Date:

Time units (work units):

**Contact Information**

4711  
Thomas Fröhlich

Phone:  
Mail: tf@meinefirma.de

- Open tickets (customer) (2)
- All Tickets (2)
- Open linked Tickets (3)
- All linked Tickets (3)

**Text Modules**

**Assigned Cts**

---

Customer History:

	TICKET#	AGE	FROM / SUBJECT	STATE	LOCK	QUEUE	OWNER	CUSTOMERID
■	2021012717000038	1 d 8 h	Thomas Fröhlich Maintenance Printer	open	lock	Postmaster	John Smith	4711
■	2021012717000011	1 d 8 h	Thomas Fröhlich phone doesn't work	open	lock	Postmaster	John Smith	4711

Figure: Create New Ticket Dialog

### Download attachments

Article action allows all attachments to an article to be downloaded as zip archive. Click "Download Attachments" button to open an operating system dialog to save archive.


### Forward

Article action allows an article/ticket to be forward to customers or other agents.

### Bounce

Article action allows articles/tickets to be redirected to another KIX system. Differs from "Forward" in that it is not necessary to specify a sender. If for example your internal system receives a ticket which should originally have been sent to a different system, said ticket can be redirected to the other system.

## Articles Filter Function

Clicking  symbol in article overview opens dialog with selection options for filtering articles. Function is not active by default.

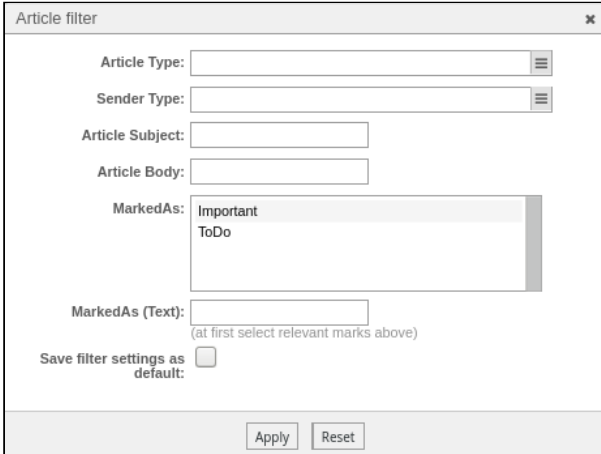

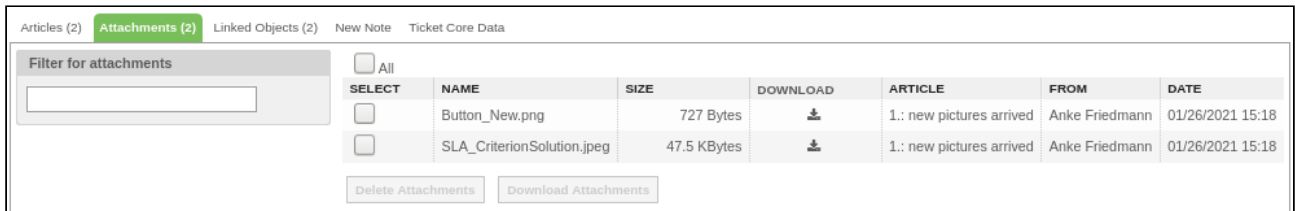


Figure: Article Filter Dialog

- Select criterion from following filter options:
  - Article type
  - Sender type
  - Article subject
  - Article Contents
  - Marked as
  - Marked as (text)
- If need be, check  next to "Save filter settings as default" if you would like to save your selection as standard filter.
- Click "Apply" button to accept settings or "Reset" button to reset filter.
- Articles will now be filtered according to your selected criteria and shown in article overview.

### 3.2.3.3 Attachments Tab

An overview of all attachments for a ticket can be seen in the "Attachments" tab.





SELECT	NAME	SIZE	DOWNLOAD	ARTICLE	FROM	DATE
<input type="checkbox"/>	Button_New.png	727 Bytes		1.: new pictures arrived	Anke Friedmann	01/26/2021 15:18
<input type="checkbox"/>	SLA_CriterionSolution.jpeg	47.5 KBytes		1.: new pictures arrived	Anke Friedmann	01/26/2021 15:18

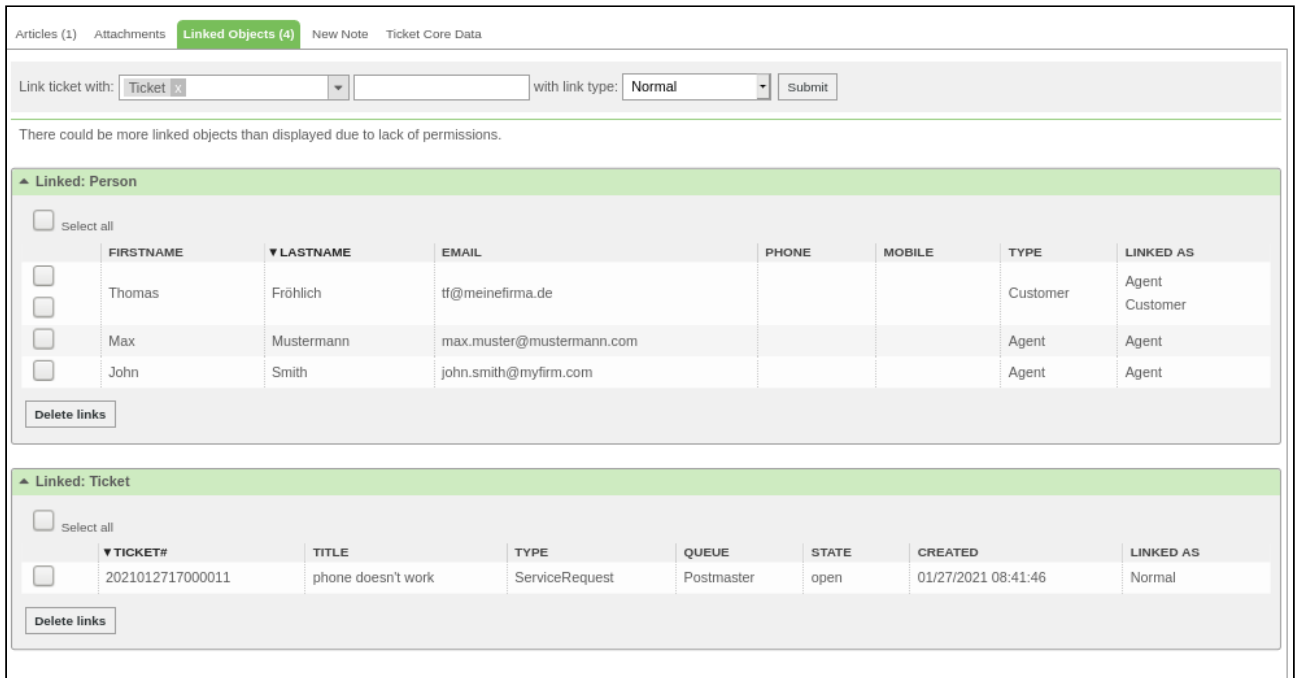
Figure: "Attachments" Tab

The following options are available in this area:

- Filter by specific attachments
- Download individual attachments onto local system
- Download attachments as zip archive
- Delete attachments

### 3.2.3.4 Linked Objects Tab

All objects linked with the ticket are listed in the "Linked Objects" tab. Linked objects can be other tickets, FAQ items, documents, work orders, people, documents, etc.



Articles (1) Attachments **Linked Objects (4)** New Note Ticket Core Data

Link ticket with:  with link type:

There could be more linked objects than displayed due to lack of permissions.

▲ **Linked: Person**

Select all

	FIRSTNAME	▼ LASTNAME	EMAIL	PHONE	MOBILE	TYPE	LINKED AS
<input type="checkbox"/>	Thomas	Fröhlich	tf@meinefirma.de			Customer	Agent Customer
<input type="checkbox"/>	Max	Mustermann	max.muster@mustermann.com			Agent	Agent
<input type="checkbox"/>	John	Smith	john.smith@myfirm.com			Agent	Agent

▲ **Linked: Ticket**

Select all

	▼ TICKET#	TITLE	TYPE	QUEUE	STATE	CREATED	LINKED AS
<input type="checkbox"/>	2021012717000011	phone doesn't work	ServiceRequest	Postmaster	open	01/27/2021 08:41:46	Normal

Figure: "Linked Objects" Tab

To create a link, use either ticket action "Link" or "Quick link" function in this category. Please note: tickets with "closed" state cannot be linked using "Quick link". Ticket action needs to be used in this case.

### 3.2.3.5 New Note Tab

In the "New Note" tab, additional information can be saved for the current ticket just as with the "Note" ticket action. The function is, in principle, similar; however, some information has been omitted in this category to allow for faster processing. This category is optional and can be deactivated by the KIX administrator if need be.

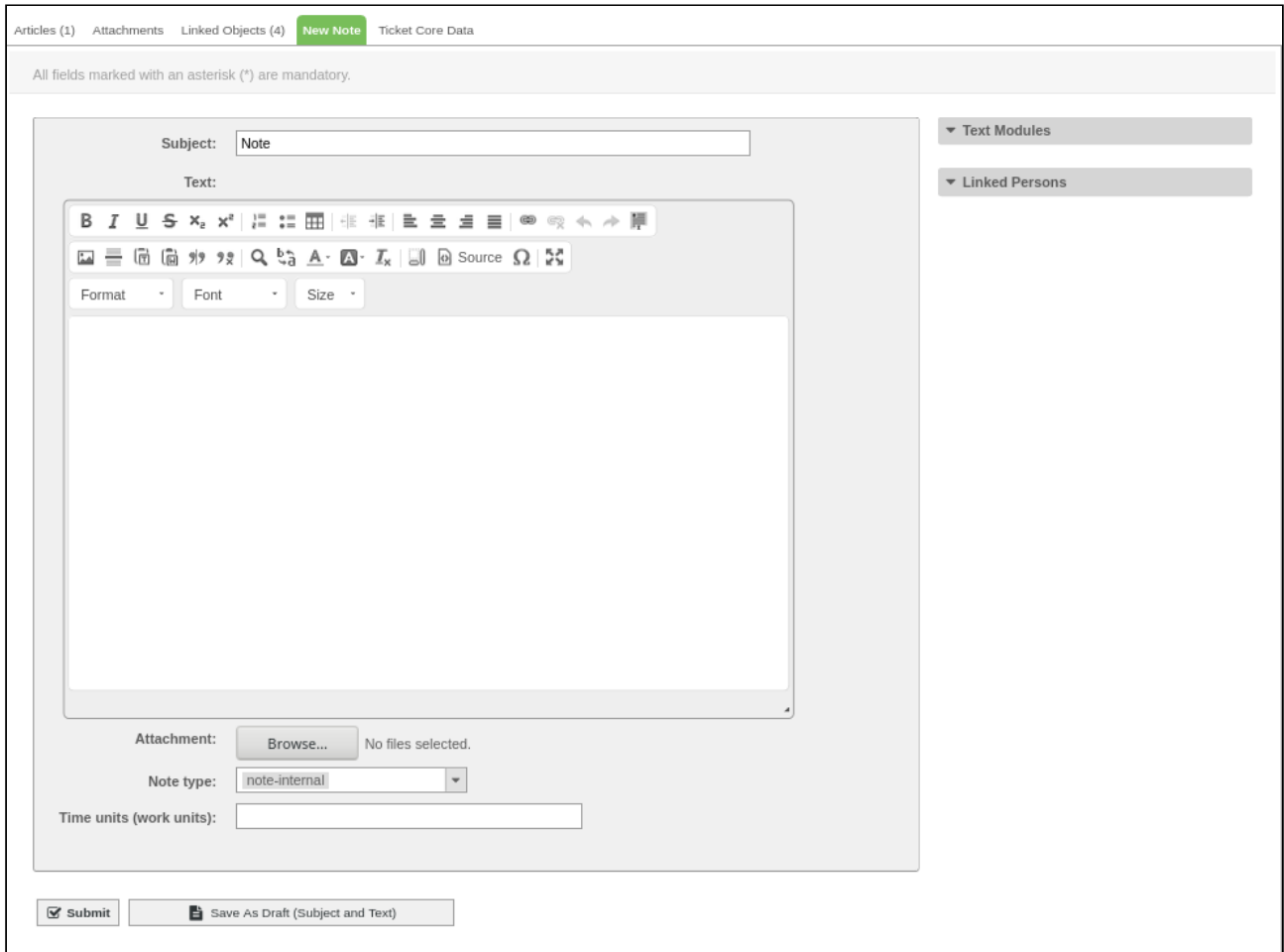


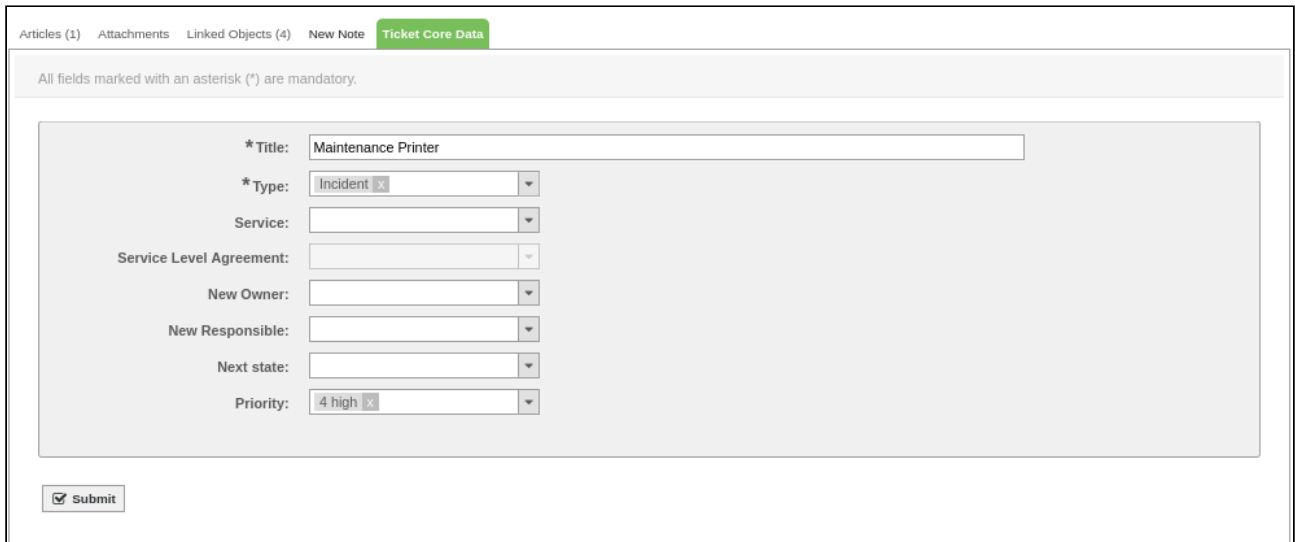
Figure: Add Note Widget

**Hint**

From KIX 17.11: It is possible to upload several files at the same time.

### 3.2.3.6 Ticket Core Data Tab

Under the "Ticket Core Data" tab, changes to main ticket characteristics can be carried out without using individual change windows such as "Owner", "Priority" or "Pending". Additional fields can be added in the Admin area.



Articles (1) Attachments Linked Objects (4) New Note **Ticket Core Data**

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

\* Title: Maintenance Printer

\* Type: Incident x

Service:

Service Level Agreement:

New Owner:

New Responsible:

Next state:

Priority: 4 high x

Submit

Figure: Ticket Core Data Widget

### 3.2.3.7 Process Information Tab

The "Process Information" tab shows created processes and their states in an overview. The category is only visible if processes have been defined in the system and the ticket is a process ticket.



Figure: Process Information

If there are still activities possible for a process ticket, said possible activity dialogs will be shown in the "Process Information" tab.



### 3.2.3.8 Dynamic Fields Tab

In the tab "Dynamic fields" you can make additions to the most important properties and information of the ticket. Additional fields can be added in the admin area.

Articles (1) Attachments Linked Objects (3) New Note Ticket Core Data **Dynamic Fields** Time Accounting

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

Betrag netto (EUR):

Projektumfang (PT):

Angebotsnummer:

Auftragswahrsch.:

Start (Plan):  01/29/2021

Ende (Plan):  01/29/2021

Supportklasse:

Externe Referenznr.:

Zusatzmodule (Vertrieb):

Absagegrund:

von/an Wettbewerber:

Kontaktpunkt:

Informant:

Location:

Room:

Demo Center Process Status:

Workaround:

verfügbar in externem Bugtracker?:

Kosten-/Budgetstelle:

beauftragt nach AGB:

Produktrelease:

Projektnummer:

AP:

Zusammenfassung:

Task Completion (%):

Paketname:

Paketrelease:

Übergeordnete Komponente / Modul:

MA Vertrieb:

Auftragstyp:

Verrechnungsart:

Workflow:

Umgesetzt in Release:

Subtask:

KIX17DC Status:

Figure: Dynamic Fields tab

 **Hint**

The "Dynamic Fields" sidebar, which is also available, is out of date and only part of the code. It has been replaced by the "Dynamic fields" tab and should NO longer be used. Simultaneous use of the "Dynamic Fields" sidebar AND the "Dynamic Fields" tab can lead to display and operating problems.

### 3.2.4 Creating a new ticket

- In "Tickets" menu, select "New ticket" or click "+" button in toolbar.

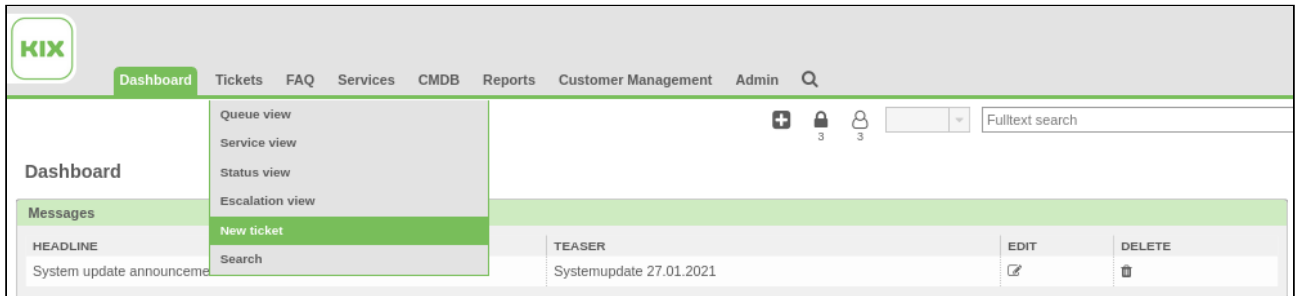


Figure: Selection Menu

- Dialog with input fields opens:

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

Ticket-Template selection:

\* Type:

\* Contact:

CustomerID:

\* To queue:

Service:

Service Level Agreement:

Owner:  ↻

Responsible:  ↻

\* Subject:

Options:

\* Text:

B I U S x<sup>2</sup> x<sup>3</sup> [List] [Table] [Link] [Image] [Source] Ω

Format    Font    Size

Attachment:  No files selected.

\* Next ticket state:

Pending date:  -

For all pending\* states.

Impact:

\* Priority:

Due Date:   -

Time units (work units):

▲ Contact information

---

▼ Text Modules

---

▲ Assigned Cis

---

Figure: New Ticket Dialog

- *Ticket-Template selection*: if applicable, select ticket template here
- *\*Type*: select ticket type.
- *\*Contact*: enter description (name) of contact.

**Hint**

Once at least two characters have been entered, any potentially matching contacts will be displayed in selection list.

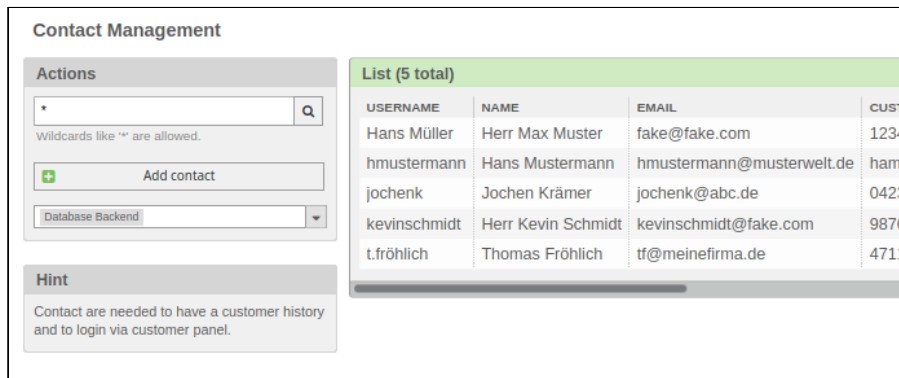
- *\*To queue*: select queue for new ticket.
- *Service*: if need be, select a service.

- *Service Level Agreement*: select a Service Level Agreement if need be.
- *Owner*: if need be, select an owner for new ticket.
- *Responsible*: if need be, select a responsible person for new ticket.
- *\*Subject*: enter descriptive subject.

**Hint**

From KIX 17.4 onwards: when entering subject, tickets with a similar subject/content is shown in "Possible duplicate tickets" area.

- *Options [Contact]*: opens Contact Management pop-up. This allows new contact to be created during ticket creation.



**Contact Management**

**Actions**

\*

Wildcards like "\*" are allowed.

Add contact

Database Backend

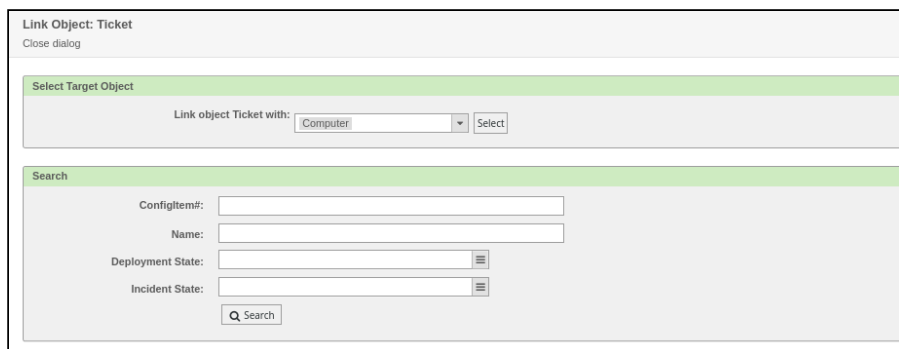
**Hint**

Contact are needed to have a customer history and to login via customer panel.

**List (5 total)**

USERNAME	NAME	EMAIL	CUST
Hans Müller	Herr Max Muster	fake@fake.com	1234
hmustermann	Hans Mustermann	hmustermann@musterwelt.de	ham
jochenk	Jochen Krämer	jochenk@abc.de	0423
kevinschmidt	Herr Kevin Schmidt	kevinschmidt@fake.com	9876
t.fröhlich	Thomas Fröhlich	tf@meinefirma.de	4711

- *Options [Link ticket]*: opens "Link Object" dialog as pop-up. Use it to link ticket during ticket creation.



**Link Object: Ticket**  
Close dialog

**Select Target Object**

Link object Ticket with:

**Search**

Configitem#:

Name:

Deployment State:

Incident State:

- *Options [FAQ]*: opens FAQ Explorer as pop-up. Use it during ticket creation to add FAQ article to ticket.

**FAQ Explorer**

FAQ

Subcategories			
NAME	COMMENT	SUBCATEGORIES	FAQ ARTICLES
Misc	Misc Comment	0	1
Misc	Misc Comment	0	5
Sicherheit	Sicherheit	0	1

**FAQ Articles: FAQ**

0-0 of 0

No FAQ data found.

**Search**

Wildcards are allowed.

Q Advanced Search

**Latest created FAQ articles**

- Telephone System Misc - en - internal (agent) - 01/27/2021 13:23
- Testticket für FAQ Misc - de - internal (agent) - 01/25/2017 09:59
- Fire or smoke development Sicherheit - de - internal (agent) - 12/12/2016 11:19


**Latest updated FAQ articles**

- Fire or smoke development Sicherheit - de - internal (agent) - 12/12/2016 11:19
- Telephone System Misc - en - internal (agent) - 01/27/2021 13:23


- *\*Text*: enter text content for new ticket here. Customary formatting options are available.
- *Attachment*: opens system dialog for adding attachments or PDF file.
- *\*Next ticket state*: if need be, select state for new ticket.
- *Impact*: it need be, select impact. Field is only available if new ticket is linked with a service.
- *\*Priority*: select priority of new ticket here.
- *Suggest as FAQ Article (OPTIONAL)*: The default value is "No". If you set the field to "Yes", an FAQ article will be created directly from the ticket. The subject of the ticket corresponds to the title of the FAQ entry. The text content symptom and solution of the FAQ entry.
- *Due Date*: if need be, enter due date here.
- *Time units (work units)*: if need be, enter time units here.
- Finally, click "Create" button.

### **Use text modules for tickets**

When creating a ticket, you have the option of using text modules created in the system for the text content of a ticket. The widget "Text modules" is located in the right sidebar.

- If necessary, click on the  symbol to expand the text module widget.
- Select the desired text module from the selection list.
- If necessary, click the "Preview" button if you want to preview the text module.
- Click the "Insert" button.

### 3.2.5 Search Tickets

Selecting "Search" menu item in "Tickets" menu opens following dialog, and allows for searching for tickets or saving templates. Alternatively, click  symbol in menu bar.

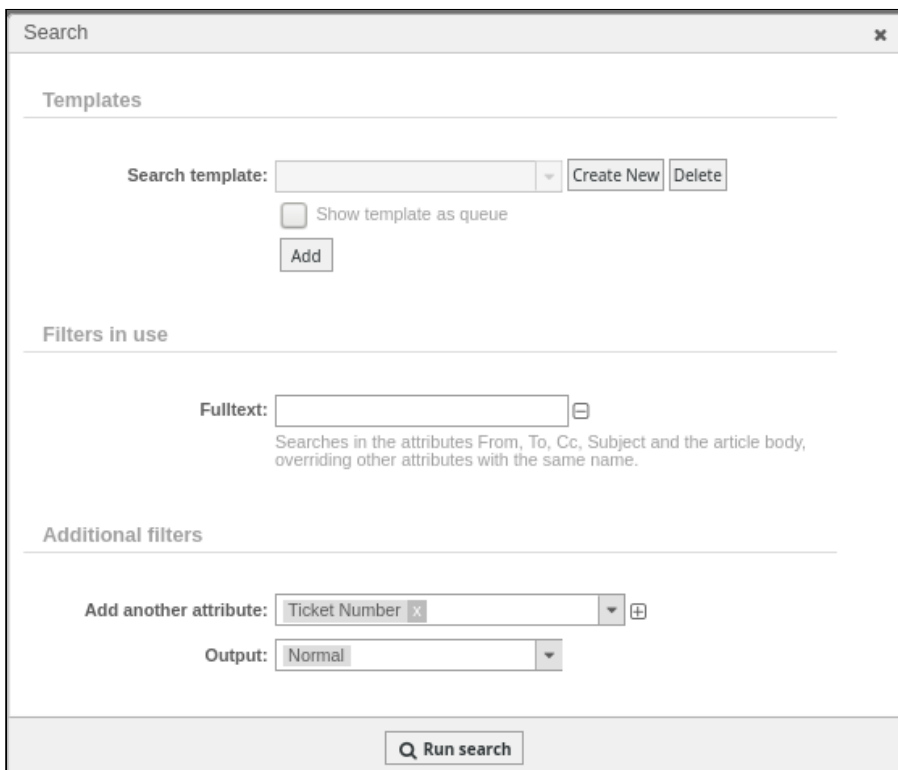



Figure: Search Tickets Dialog

#### **Ticket Search**

- Enter search term in "Fulltext" field.
- Select one or more filter attributes from "Add another attribute" selection list.
- Add selected attribute using  to "Filters in use" list.
- Select output format from "Output" selection list (Normal, Print, CSV, or Excel).
- Click "Run search" button.

**Hint**

The output format CSV file contains contents quoted with " in all cells. If you open this file with LibreCalc or Excel, select the option "Format values in inverted commas as text". This is the only way to obtain a text file and prevent the execution of foreign code (possibly corrupt data) in your system.

**Creating Search Templates**

- Click "Create new" button.
- Enter designation in "Name" input field.
  - **!** When creating search templates, no ":" may be used in the name. This leads to an unwanted behaviour of the system, as a result of which all tickets are displayed on the dashboard when integrated into widgets.
- If need be, mark box next to "Save changes in template".
- If need be, mark box next to "Show template as queue". Search template will then be visible under "Tickets -> Queue view".
- If need be, mark box next to "Share this new template with other agents". Search template can then be used by other agents, if they have "subscribed" to search template as category in personal preferences.
- Click "Submit" button.

**Creating Search Template Category and Sharing It with Other Agents**

To be able to share search template with other agents, search template must be assigned to category.

- When creating search template, mark box next to "Share this new template with other agents"

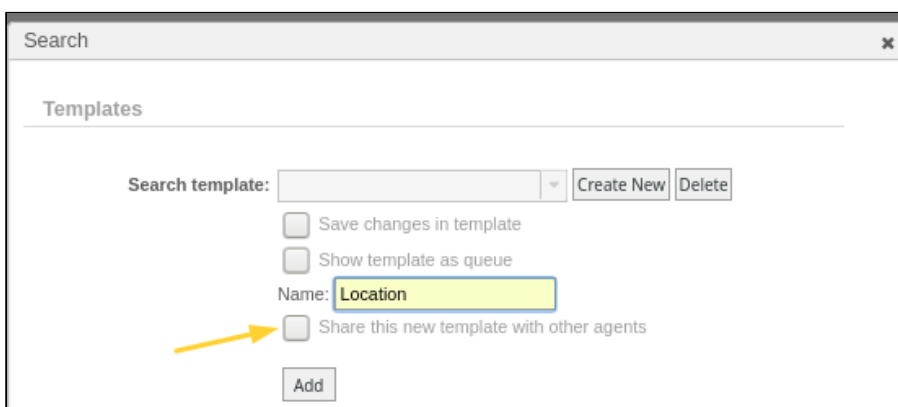



Figure: Example Assigning Search Template to Category

- Now select existing category or create a new category.
- Click "Add" button.




- To finish, click "Run search" so search is carried out and search template and category are saved.

Search template is now available to other agents if they have subscribed to this category in their personal preferences . Under "My Auto-subscribe search profile categories", every agent can select which search categories they wish to subscribe to.

### **Ticket Search via Contents in Article Attachments**

From KIX Professional 17.4 onwards, there is the option to search for tickets via text contents in article attachments. Searchable file types are: txt, doc/x, xls/x, pdf, jpg, bmp, tiff, png, gif. Usable keywords during search are selected according to word weighting in article attachment.

- To do so, select "Attachment Content" attribute in "Additional Filters" area during ticket search, and add filter using .
- Enter search term in "Attachment Content" input field.
- Select output format from "Output" selection list (Normal, Print, CSV, or Excel).
- Click "Run search" button.

#### **Warning**

The index for legacy data is not automatically built for existing systems. This must be done with the console command 'Maint :: Ticket :: AttachmentNameIndexRebuild'.

When changing the ArticleStorage, the index is deleted and must be recreated for the old data with the console command 'Maint :: Ticket :: AttachmentNameIndexRebuild'.

**i Please note**

- Following installation, searching in article attachments is carried out only on tickets or articles which were created after installation. If you would like to search tickets which were created before installation, run the following script:

```
"bin/kix.Console.pl Maint::Ticket::AttachmentIndexRebuild"
```

**ATTENTION: if there are many tickets in your system, running script may severely affect the system.**

To limit time periods, use the following parameters:

*ticket-newer (YYYY-MM-DD)*

*ticket-older (YYYY-MM-DD)*

- **If using KIX with Ubuntu:**

So that the search functions correctly, the following modifications in the "policy.xml" file from "ImageMagick" are necessary:

PDF rights: `<policy domain="coder" rights="none" pattern="PDF" />` to `<policy domain="coder" rights="read" pattern="PDF" />`

Free hard disk space: change `<policy domain="resource" name="disk" value="1GiB"/>` to `<policy domain="resource" name="disk" value="10GiB"/>`

### 3.3 Module: FAQ

The FAQ module (frequently asked questions) provides a structured knowledge database with answers to frequently asked questions. These can, for example, be suggestions for rectifying known problems, or company-specific processes. FAQ articles can be categorized and multiple languages can be managed.

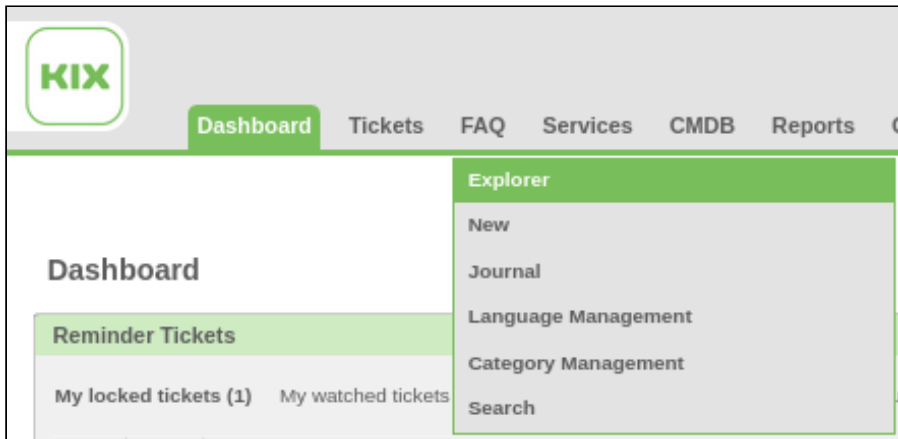
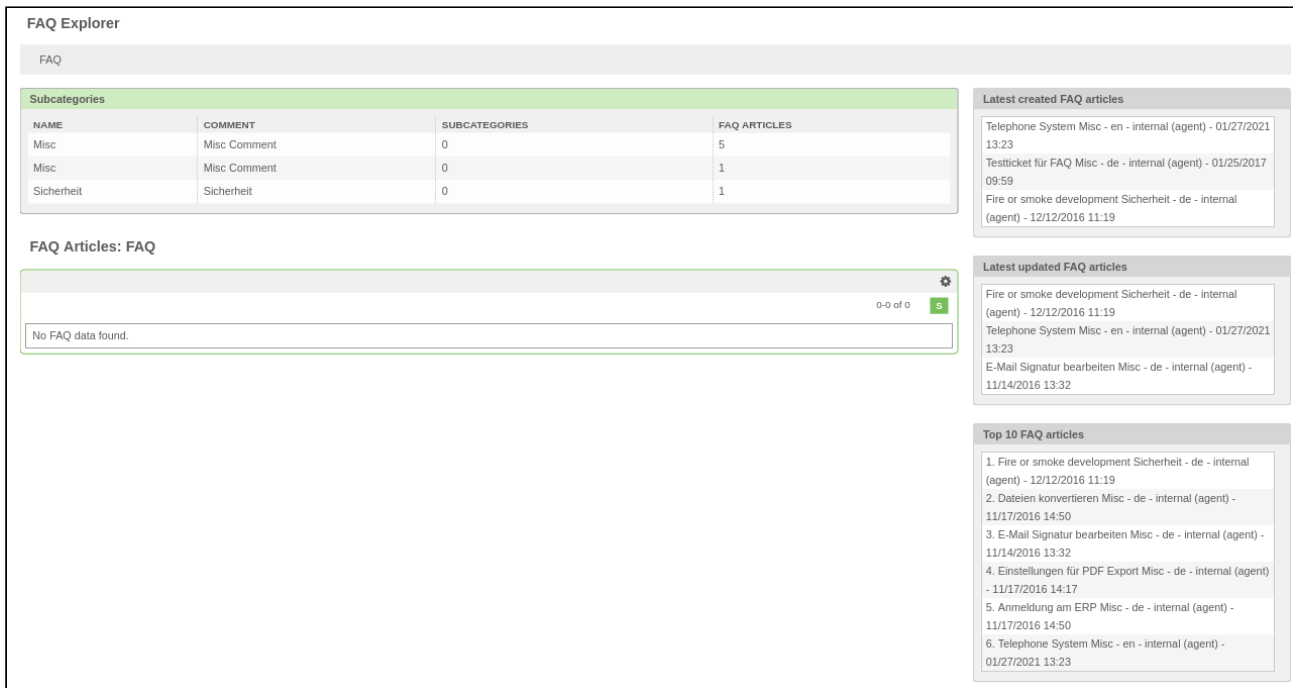


Figure: FAQ Module, Menu

### 3.3.1 Explorer

Selecting "Explorer" menu item in FAQ menu opens an overview of the knowledge database – FAQ Explorer.



The screenshot shows the 'FAQ Explorer' interface. At the top, there is a 'FAQ' header. Below it, a 'Subcategories' table lists categories and their associated articles. To the right, three sidebar widgets provide additional information: 'Latest created FAQ articles', 'Latest updated FAQ articles', and 'Top 10 FAQ articles'. Below the subcategories table, there is a section for 'FAQ Articles: FAQ' which currently shows 'No FAQ data found'.

NAME	COMMENT	SUBCATEGORIES	FAQ ARTICLES
Misc	Misc Comment	0	5
Misc	Misc Comment	0	1
Sicherheit	Sicherheit	0	1

**Latest created FAQ articles**

- Telephone System Misc - en - internal (agent) - 01/27/2021 13:23
- Testticket für FAQ Misc - de - internal (agent) - 01/25/2017 09:59
- Fire or smoke development Sicherheit - de - internal (agent) - 12/12/2016 11:19

**Latest updated FAQ articles**

- Fire or smoke development Sicherheit - de - internal (agent) - 12/12/2016 11:19
- Telephone System Misc - en - internal (agent) - 01/27/2021 13:23
- E-Mail Signatur bearbeiten Misc - de - internal (agent) - 11/14/2016 13:32

**Top 10 FAQ articles**

1. Fire or smoke development Sicherheit - de - internal (agent) - 12/12/2016 11:19
2. Dateien konvertieren Misc - de - internal (agent) - 11/17/2016 14:50
3. E-Mail Signatur bearbeiten Misc - de - internal (agent) - 11/14/2016 13:32
4. Einstellungen für PDF Export Misc - de - internal (agent) - 11/17/2016 14:17
5. Anmeldung am ERP Misc - de - internal (agent) - 11/17/2016 14:50
6. Telephone System Misc - en - internal (agent) - 01/27/2021 13:23

Figure: FAQ Explorer

Widgets with information about "Last created FAQ articles", "Last updated FAQ articles", and "Top 10 FAQ articles" are located in the sidebar to the right. An overview of the FAQ categories and an overview of all FAQ articles of a category are located to left.

Selecting a category shows existing subcategories. Selecting an FAQ article displays the contents of the FAQ article.

### 3.3.2 FAQ Article Contents

Selecting an FAQ article via a subcategory in the FAQ Explorer or via search opens the content of said FAQ article.

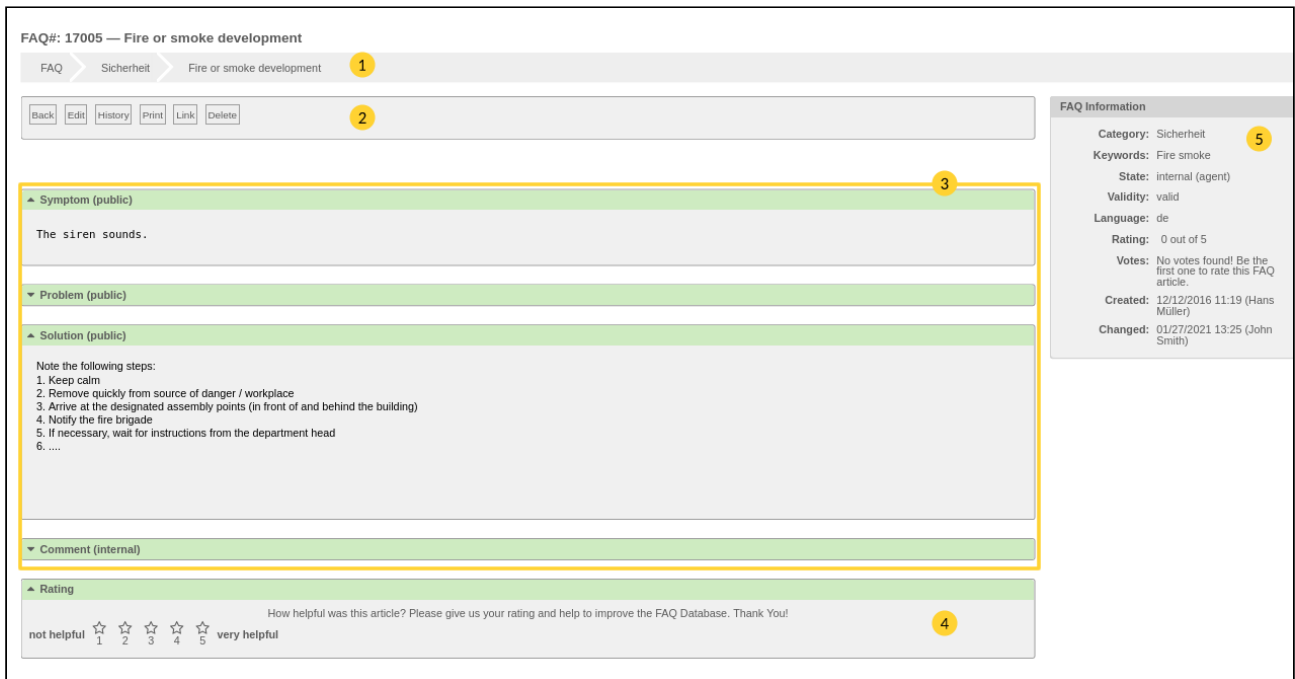


Figure: Content of FAQ Article

1	Title
2	FAQ article actions
3	Symptom, problem, solution, and comments for FAQ article
4	FAQ article rating
5	Information about category, state, language, creation and change date.

### 3.3.2.1 FAQ Article Actions

#### **Back**

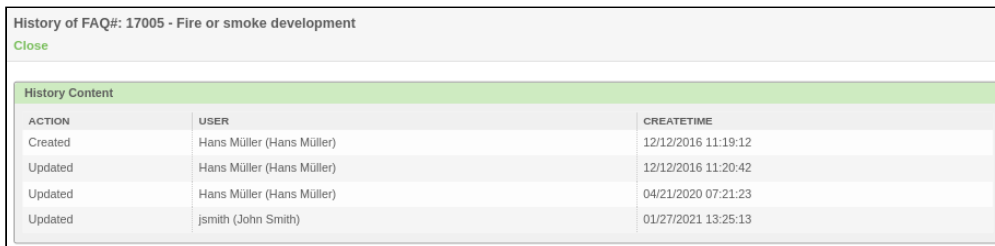
Switches back to FAQ Explorer (into respective category or subcategory)

#### **Edit**

Use this to edit existing FAQ article.

#### **History**

Lists all actions carried out on FAQ article, with information about time and user who carried out action.



History of FAQ#: 17005 - Fire or smoke development  
[Close](#)

History Content		
ACTION	USER	CREATETIME
Created	Hans Müller (Hans Müller)	12/12/2016 11:19:12
Updated	Hans Müller (Hans Müller)	12/12/2016 11:20:42
Updated	Hans Müller (Hans Müller)	04/21/2020 07:21:23
Updated	jsmith (John Smith)	01/27/2021 13:25:13

Figure: FAQ Article History

#### **Print**

Creates PDF file with content of FAQ article.

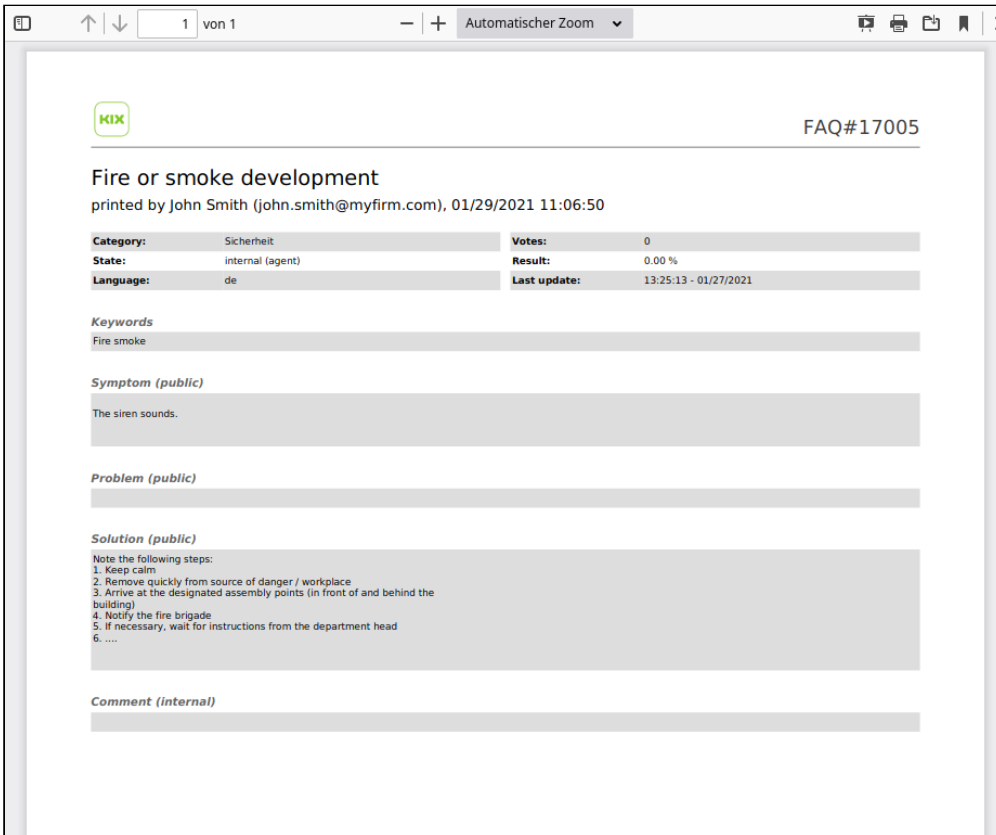


Figure: PDF with FAQ Article Content

## Link

FAQ article can be linked with other objects here.

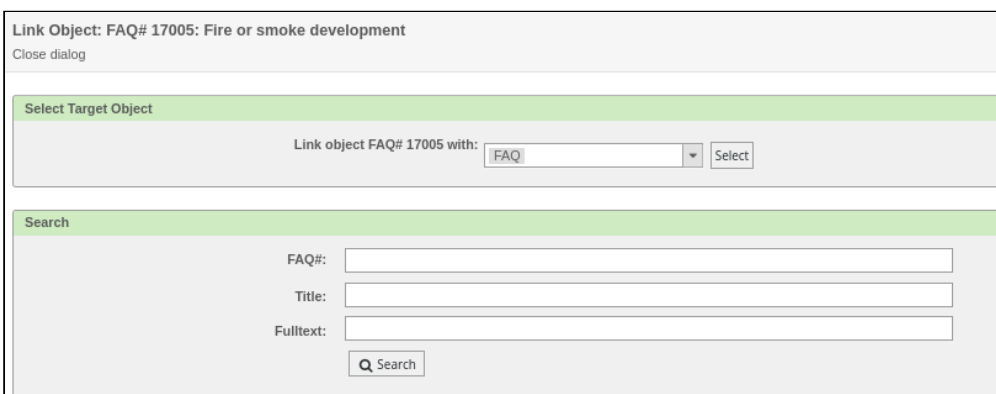
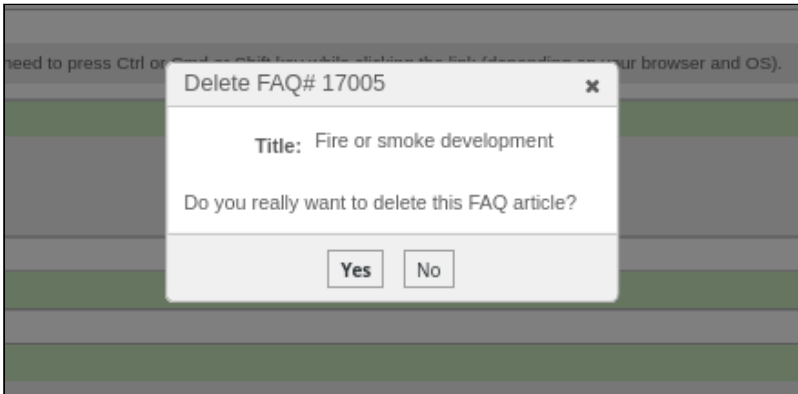


Figure: Link FAQ Article Dialog

## **Delete**

Deletes opened FAQ article.

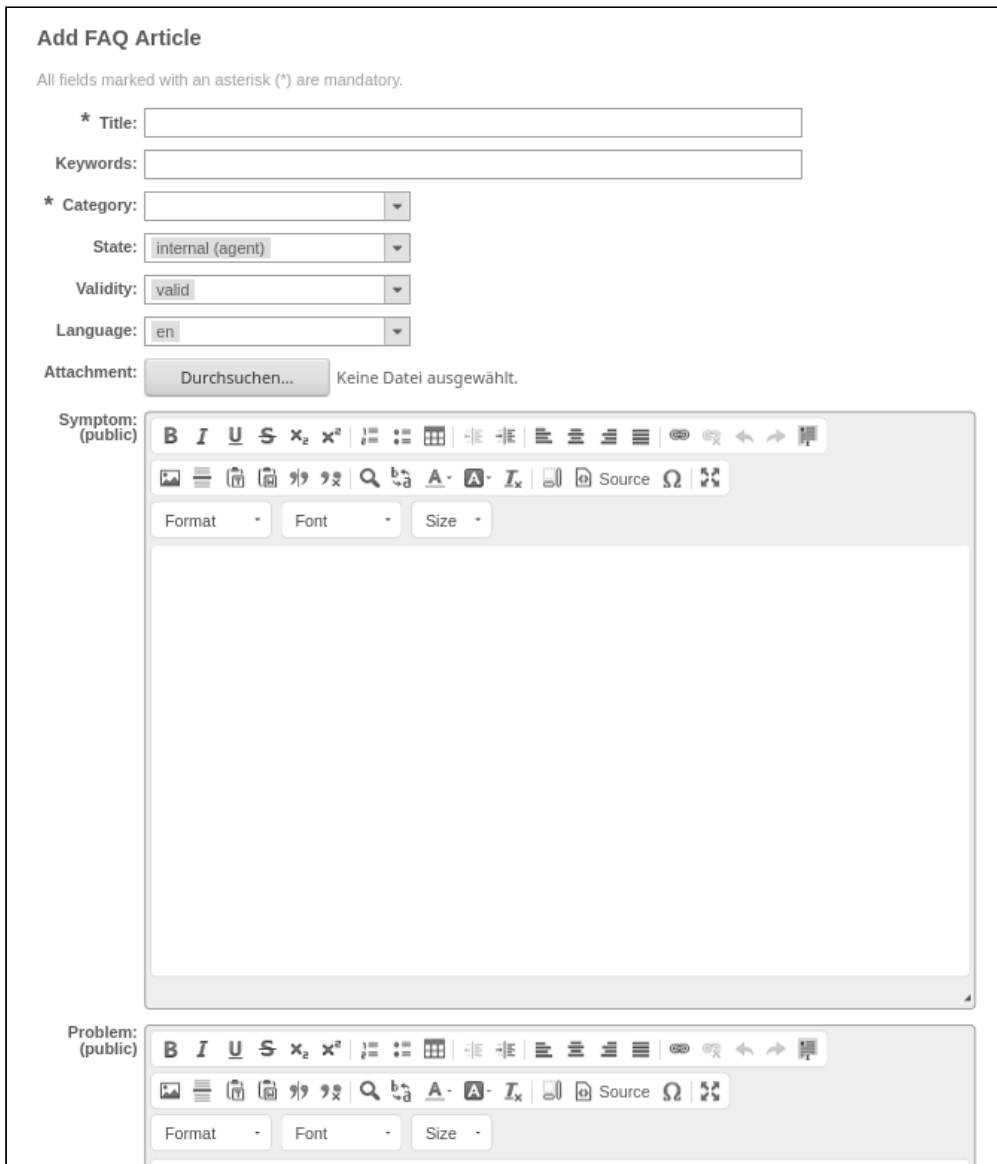


*Figure: Delete FAQ Article Dialog*



### 3.3.3 Creating FAQ Article

- In "FAQ" menu, select "New" menu item.
- The following window opens:



**Add FAQ Article**

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

\* Title:

Keywords:

\* Category:

State:

Validity:

Language:

Attachment:  Keine Datei ausgewählt.

Symptom: (public)

Problem: (public)

Figure: Creating FAQ Article - partial view

- **Title:** enter title of FAQ article here.
- **Keywords:** if need be, enter keywords here. Individual key words can be separated with spaces.
- **Category:** select category for FAQ article.

- *State*: select state (internal, external, public) of article here.
- *Validity*: specify validity of article here.
- *Language*: specify language of article here.
- *Attachment*: if need be, add an attachment to FAQ article.
- *Symptom*: if need be, enter description of symptoms here.
- *Problem*: if need be, enter description of problem here.
- *Solution*: if need be, enter description of solution.
- *Comment*: if need be, enter comment here.

Brackets show for which people FAQ article is visible. The states mean the following:

- external (customer): FAQ articles are visible for agents and contacts registered on web interface.
- internal (agent): FAQ article only visible for agents.
- public (all): FAQ articles are visible in public frontend even without registration.


Contents of individual input fields can be pure text or text formatted using HTML.

- After entering data, click "Create" .
- FAQ article will be saved in selected category.

### 3.3.4 FAQ Journal

The FAQ Journal offers a chronologically ordered overview of previous events for all FAQ articles. It shows whether an FAQ article has been created or updated. Therefore, multiple entries can exist for one article. Articles are also shown which are set to "invalid". Deleted articles are not shown in the overview.

FAQ Journal:

1-13 of 13 

FAQ#	TITLE	CATEGORY	ACTION	TIME
17005	Fire or smoke development	Sicherheit	Updated	01/27/2021 13:25:13
17008	Telephone System	Misc	Created	01/27/2021 13:23:28
17005	Fire or smoke development	Sicherheit	Updated	04/21/2020 07:21:23
17001	E-Mail Signatur bearbeiten	Misc	Updated	04/21/2020 07:20:26
17007	Testticket für FAQ	Misc	Created	01/25/2017 09:59:45
17005	Fire or smoke development	Sicherheit	Updated	12/12/2016 11:20:42
17005	Fire or smoke development	Sicherheit	Created	12/12/2016 11:19:12
17004	Anmeldung am ERP	Misc	Created	11/17/2016 14:50:54
17003	Dateien konvertieren	Misc	Created	11/17/2016 14:50:13
17002	Einstellungen für PDF Export	Misc	Created	11/17/2016 14:17:41
17001	E-Mail Signatur bearbeiten	Misc	Created	11/14/2016 13:32:21
17001	E-Mail Signatur bearbeiten	Misc	Created	10/05/2016 10:28:14
17001	E-Mail Signatur bearbeiten	Misc	Created	04/28/2016 10:20:39

Figure: FAQ Journal

Use  symbol in upper right to call up settings. Specify here how many FAQ articles are to be shown.

Settings ✕

FAQ articles per page:

Figure: FAQ Journal Settings

### 3.3.5 FAQ Language Management

Multiple languages can be used for one FAQ article. In "FAQ" menu, click on "Language Management" menu item to open overview of managed languages.

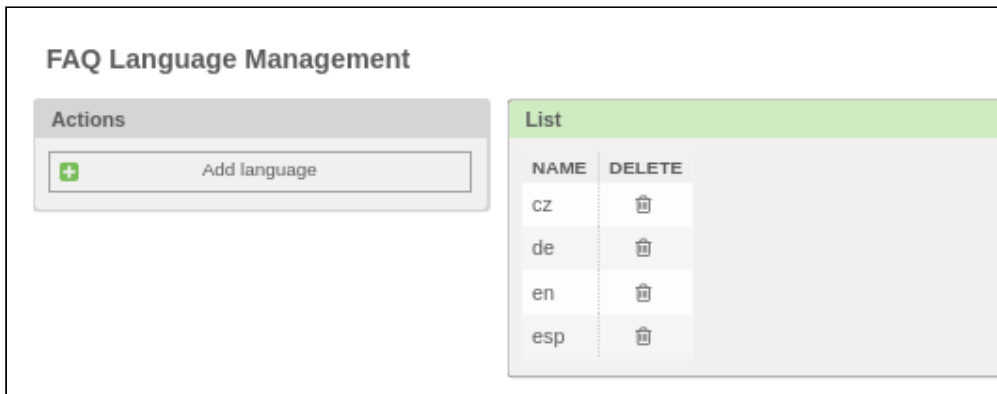
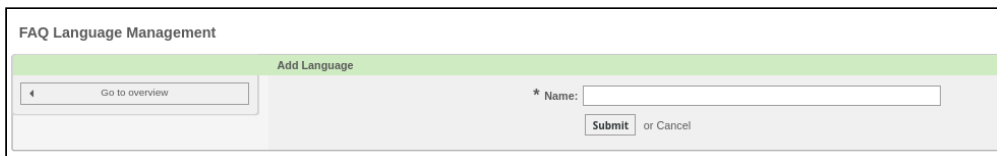


Figure: FAQ Language Management

#### **Adding Language**

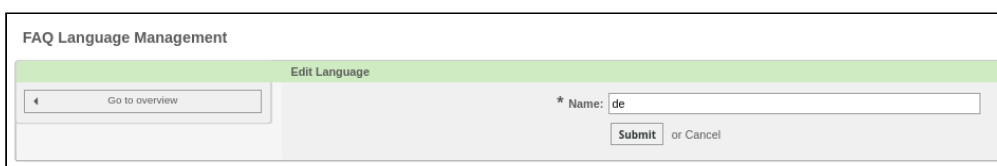
- Click "Add Language" button.
- Enter new language.



- Click "Submit" button.
- Newly added language appears in language management list.

#### **Changing Language**


- Click language in list.
- Enter new language designation.





- Click "Submit" button.
- Changed language designation appears in list.

### **Deleting Language**

- Click  symbol next to language in list.
- Language is deleted from list.

### 3.3.6 FAQ Category Management

FAQ categories can be edited via "Category Management" menu item in the "FAQ" menu. After selecting the menu item, a window opens, potentially with existing categories.

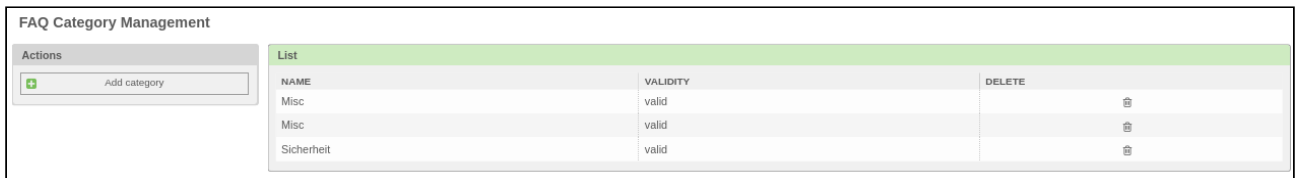


Figure: FAQ Category Management

#### Adding Category

- Click "Add category" button.
- "Add Category" dialog opens.

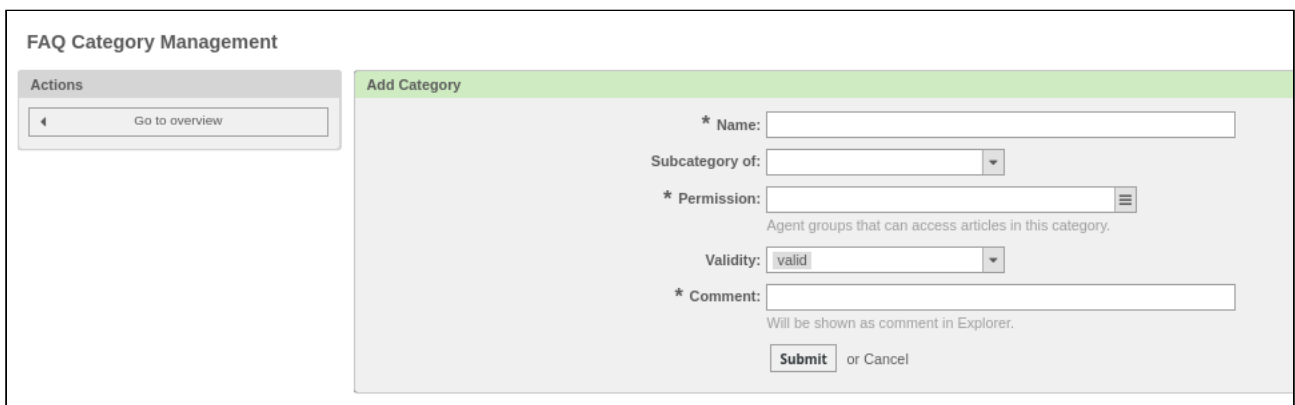
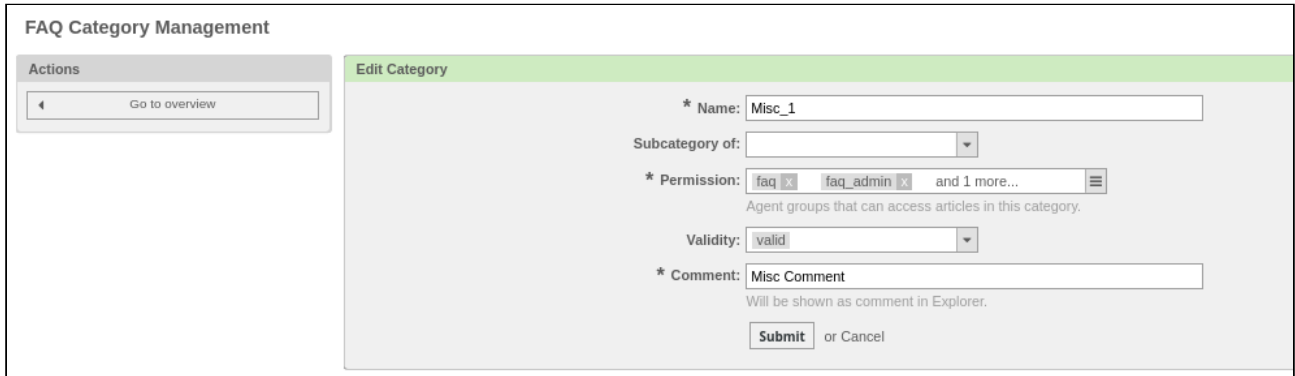


Figure: Add Category Dialog

- **Name:** specify name for category here.
- **Subcategory of:** if need be, select main category.
- **Permission:** specify who has access to FAQ category here.
- **Validity:** specify if category is valid or invalid here.
- **Comment:** enter comment here.
- Click "Submit" button.
- Newly created category is saved.

## Editing Category

- In overview, click category you wish to edit.
- "Edit Category" widget opens.



The screenshot shows the 'FAQ Category Management' interface. On the left, there is an 'Actions' panel with a 'Go to overview' button. The main area is titled 'Edit Category' and contains the following fields:

- \* Name:** A text input field containing 'Misc\_1'.
- Subcategory of:** A dropdown menu.
- \* Permission:** A field showing 'faq' and 'faq\_admin' with 'and 1 more...' and a menu icon. Below it, a note reads 'Agent groups that can access articles in this category.'
- Validity:** A dropdown menu currently set to 'valid'.
- \* Comment:** A text input field containing 'Misc Comment'. Below it, a note reads 'Will be shown as comment in Explorer.'


At the bottom right of the form, there are 'Submit' and 'Cancel' buttons.

Figure: Edit Category Dialog

- **Name:** specify name for category here.
- **Subcategory of:** if need be, select main category.
- **Permission:** specify who has access to FAQ category here.
- **Validity:** specify if category is valid or invalid here.
- **Comment:** enter comment here.
- Click "Submit" button.
- Edits are saved.

### 3.3.7 FAQ Article Search

You can search for specific articles in the knowledge database. You can create search templates and define different attributes in order to limit search results.

- Either click "Search" in "FAQ" module, or use  symbol in menu bar while in FAQ module.

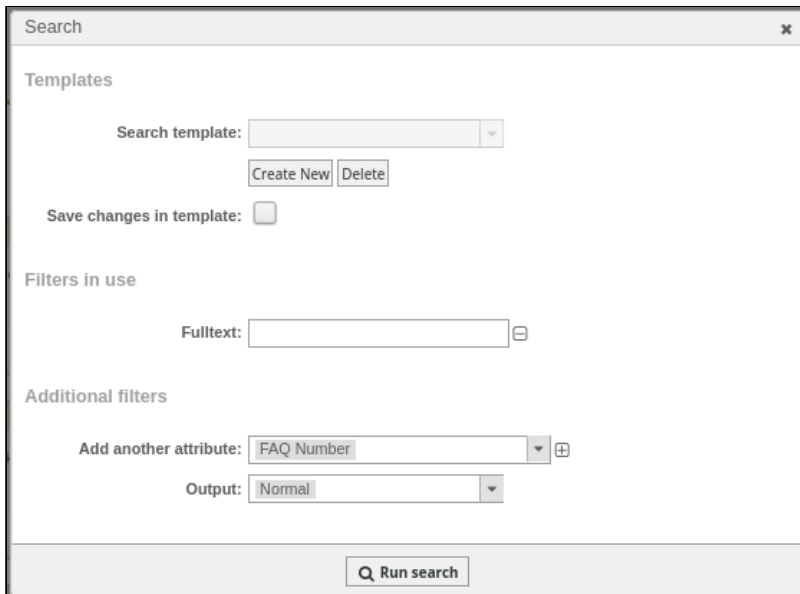






Figure: FAQ Article Search Dialog

- *Search template*: if need be, select existing search template or create new search template.
- *Save changes in template*: check box here if you wish to edit an existing search template.
- *Filters in use*: you can see currently specified attributes here. Attributes can be removed by clicking  symbol.
- *Additional filters*: additional attributes can be selected from list here and added to search template with  symbol.
- *Output*: you can select whether results are to be output as normal, printed, or CSV file here.
- Finally, click "Run search" button.



### **Creating a Search Template**

- Click "Create new" button.
- Enter name for search template in input field.
  - ⚠ When creating search templates, no ":" may be used in the name. This leads to an unwanted behaviour of the system, as a result of which all tickets are displayed on the dashboard when integrated into widgets.
- Click "Add" button.
- Select attribute from selection list under "Additional filters".
- Click  symbol next to selection list.
- Attribute will be added to template.
- Click  symbol next to selection list if you wish to remove attribute.
- Select how search results are to be output using "Output" selection list.
- Click "Run search" button.
- Search is performed and search template saved.

### 3.4 Module: Services

The "Services" module offers a clear overview and management of services from the service catalog or SLAs (Service Level Agreements). In general, the service catalog is specific to a customer or company.

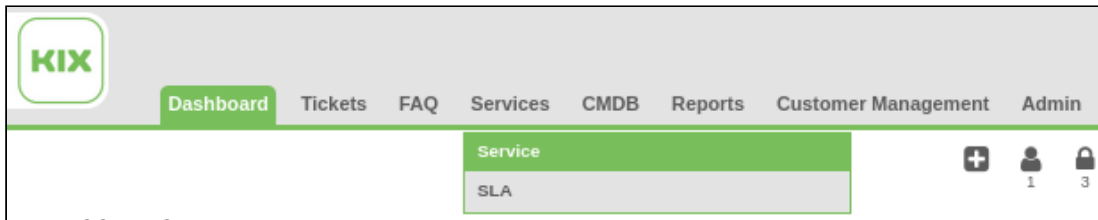


Figure: Services Module Menu

### 3.4.1 Service

The service catalog is accessed via "Services" menu item in the "Services" menu. All services defined in the system are listed in the overview. New services can be defined in the Admin area under "Ticket Settings" -> "Services".







Overview: Service					
STATE	SERVICE	COMMENT	TYPE	CRITICALITY	CHANGED
	Gerätewartung		IT Operational	1 very low	12/19/2016 13:40:22
	Personal		End User Service	3 normal	04/23/2020 08:19:09
	Support		Project	4 high	12/14/2016 15:43:29

Figure: "Overview: Service" Widget

column	content
1	State (  Operational/  Incident/  Warning )
2	Service name
3	Comment
4	Service type
5	Criticality (1 = very low / 2 = low / 3 = normal / 4 = high / 5 = very high)
6	Date/time of last change

### 3.4.1.1 Service Content

Clicking a service displays service content.

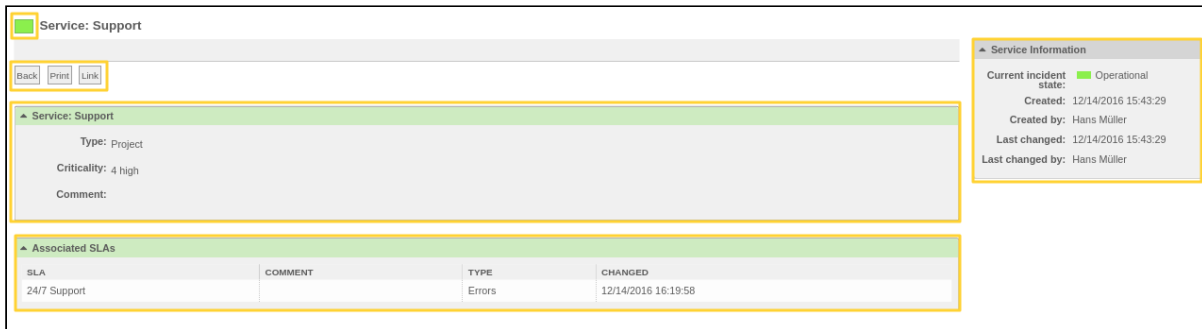





Figure: Service Content

1	State (  Operational/  Incident/  Warning )
2	Actions
3	Information about service (name, name of superordinate service if need be, type, criticality)
4	Associated SLAs
5	Service Information

### 3.4.1.2 Actions

#### **Back**

Back to overview

#### **Print**

Generates PDF document with information about selected service.

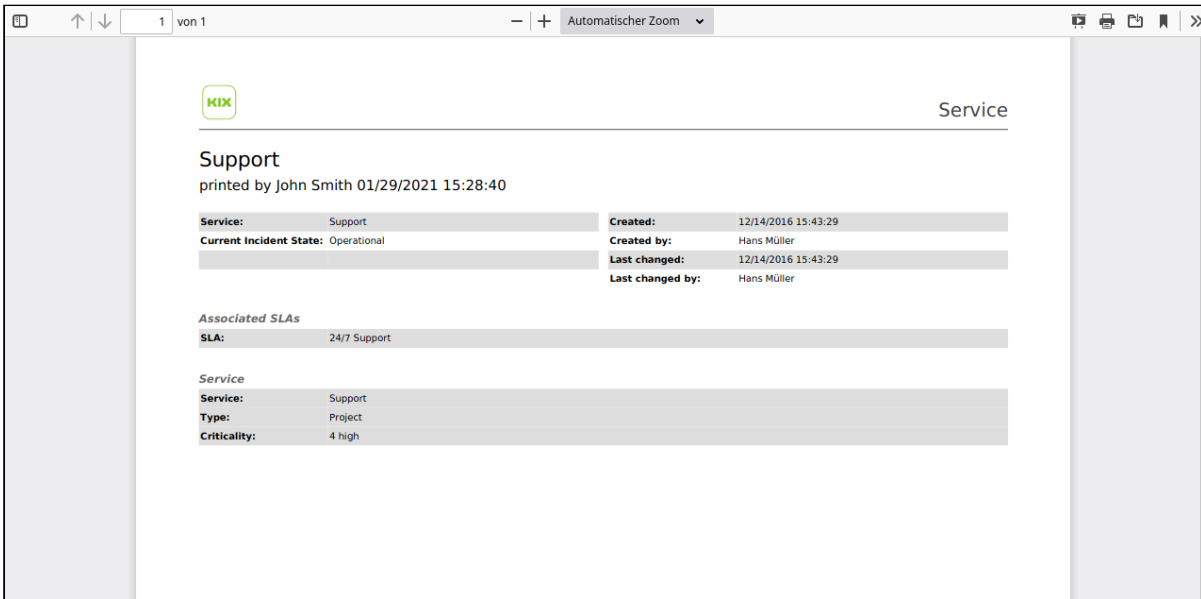


Figure: PDF Document with Information about Service

## Link

Links service with other objects such as FAQ items, ConfigItems, or documents.

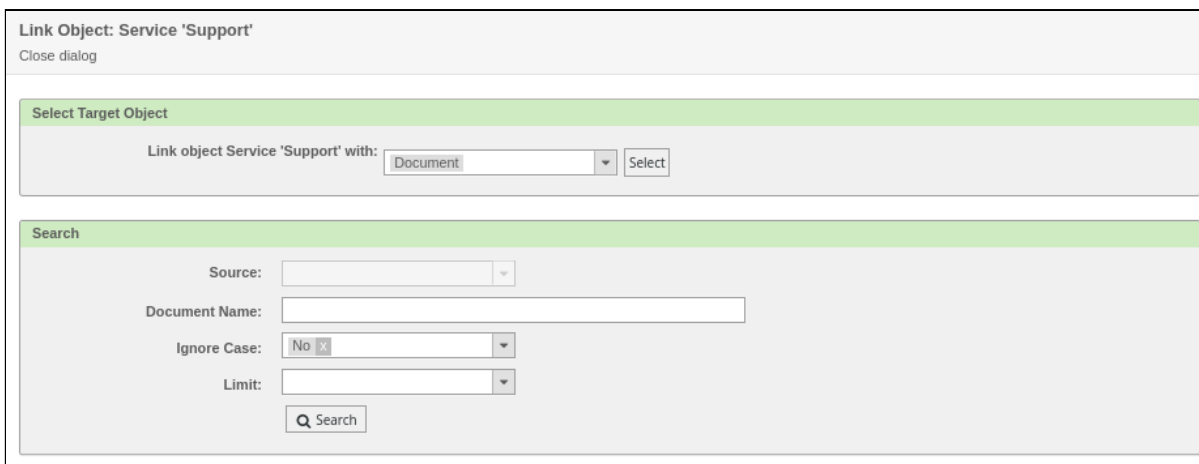


Figure: Link Object Dialog

### 3.4.2 SLA

You can call up an overview of SLAs (Service Level Agreements) via "SLA" menu item in the "Service" menu. All SLAs defined in the system are listed here.

Overview: SLA			
SLA	COMMENT	TYPE	CHANGED
24/7 Support		Errors	12/14/2016 16:19:58
Druckerwartung		Resolution Rate	11/14/2016 15:11:40

Figure: SLA Overview Widget

column	content
1	SLA name
2	Comment
3	Type
4	Change date

#### 3.4.2.1 SLA Content

SLA: 24/7 Support

SLA Information

[Back](#) [Print](#)

▲ SLA: 24/7 Support

Type: Errors

Calendar: Calendar Default

First Response Time: 1440 minutes

Update Time: 0 minutes

Solution Time: 0 minutes

Minimum Time Between Incidents: 0 minutes

Comment:

Created: 12/14/2016 16:19:58

Created by: Hans Müller

Last changed: 12/14/2016 16:19:58

Last changed by: Hans Müller

▲ Associated Services

STATE	SERVICE	COMMENT	TYPE	CRITICALITY	CHANGED
■	Support		Project	4 high	12/14/2016 15:43:29

Figure: SLA Content Widget

1	Actions
2	SLA overview
3	Associated Services overview
4	SLA Information

### 3.4.2.2 SLA Actions

#### **Back**

Back to SLA overview.

#### **Print**

Generates PDF document with information about SLA.

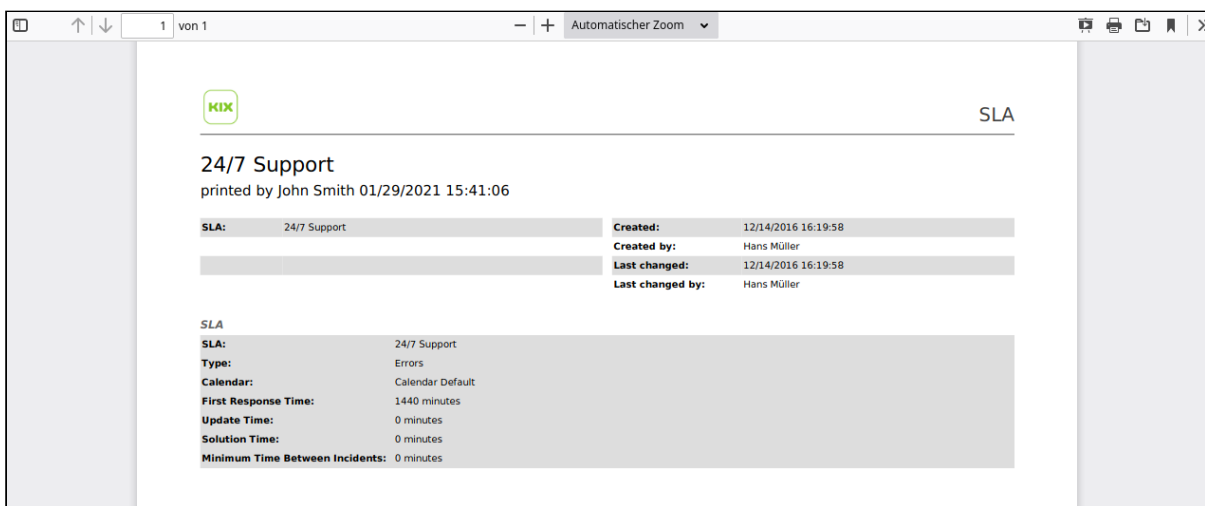


Figure: PDF Printout of SLA Content



### 3.5 Module: CMDB

The "CMDB" module offers functions for managing and creating ConfigItems (CI).

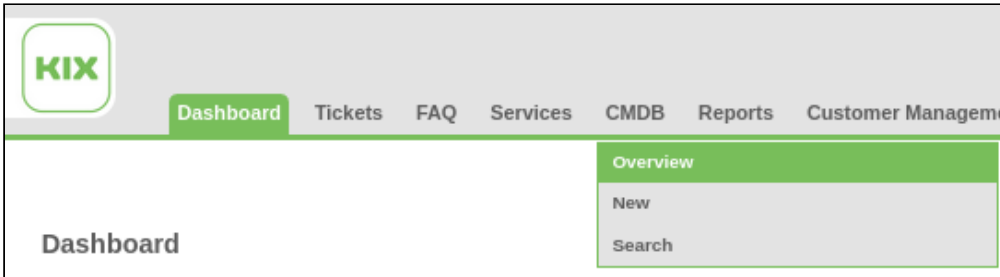
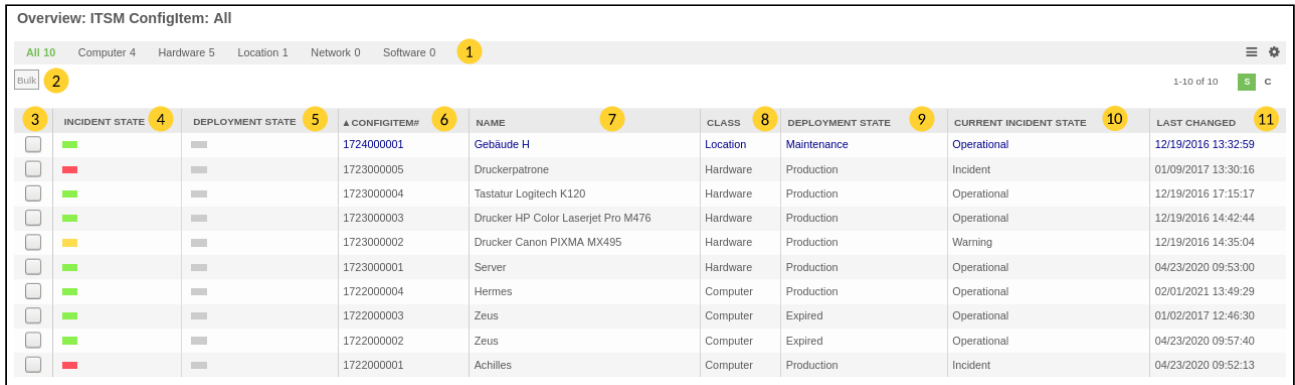


Figure: CMDB Module – Menu



### 3.5.1 ConfigItem Overview

Clicking "Overview" menu item in "CMDB" menu leads to an overview of all ConfigItem (CI) classes.





The screenshot shows the 'Overview: ITSM ConfigItem: All' page. At the top, there are filters for 'All 10', 'Computer 4', 'Hardware 5', 'Location 1', 'Network 0', and 'Software 0'. Below the filters is a table with 11 columns: Incident State, Deployment State, ConfigItem#, Name, Class, Deployment State, Current Incident State, and Last Changed. The table lists various items like 'Gebäude H', 'Druckerpatrone', 'Tastatur Logitech K120', etc., with their respective states and classes.

3	4	5	6	7	8	9	10	11
INCIDENT STATE	DEPLOYMENT STATE	CONFIGITEM#	NAME	CLASS	DEPLOYMENT STATE	CURRENT INCIDENT STATE	LAST CHANGED	
<input type="checkbox"/>	<span style="color: green;">■</span>	172400001	Gebäude H	Location	Maintenance	Operational	12/19/2016 13:32:59	
<input type="checkbox"/>	<span style="color: red;">■</span>	172300005	Druckerpatrone	Hardware	Production	Incident	01/09/2017 13:30:16	
<input type="checkbox"/>	<span style="color: green;">■</span>	172300004	Tastatur Logitech K120	Hardware	Production	Operational	12/19/2016 17:15:17	
<input type="checkbox"/>	<span style="color: green;">■</span>	172300003	Drucker HP Color Laserjet Pro M476	Hardware	Production	Operational	12/19/2016 14:42:44	
<input type="checkbox"/>	<span style="color: yellow;">■</span>	172300002	Drucker Canon PIXMA MX495	Hardware	Production	Warning	12/19/2016 14:35:04	
<input type="checkbox"/>	<span style="color: green;">■</span>	172300001	Server	Hardware	Production	Operational	04/23/2020 09:53:00	
<input type="checkbox"/>	<span style="color: green;">■</span>	172200004	Hermes	Computer	Production	Operational	02/01/2021 13:49:29	
<input type="checkbox"/>	<span style="color: green;">■</span>	172200003	Zeus	Computer	Expired	Operational	01/02/2017 12:46:30	
<input type="checkbox"/>	<span style="color: green;">■</span>	172200002	Zeus	Computer	Expired	Operational	04/23/2020 09:57:40	
<input type="checkbox"/>	<span style="color: red;">■</span>	172200001	Achilles	Computer	Production	Incident	04/23/2020 09:52:13	




Figure: CMDB Overview

1	CI classes
2	Action buttons
3	Checkbox for Bulk
4	Symbol for Incident State
5	Symbol for Deployment State
6	ConfigItem number
7	ConfigItem name
8	Class
9	Deployment State (Production / Inactive / Maintenance / Pilot / Planned / Repair / Expired / Review / Test/QA / Retired)


10	Current Incident State (  Operational /  Incident /  Warning)
11	Date of last change

ConfigItems of a specific class can be shown by clicking a class in "CI Classes" area. To sort a column in ascending or descending order, click on a column header. The  or  symbol shows the order in which entries are sorted.

ConfigItems with inactive deployment state are hidden by default. You can define in the Admin area whether inactive ConfigItems are to be shown, as well as define additional states for ConfigItems.

Select between standard view  and custom view  in the overview. Clicking  symbol in upper right opens dialog to set number of shown ConfigItems.

### Adjusting View

- Click  symbol in upper right of overview.
- Dialog for column settings opens.

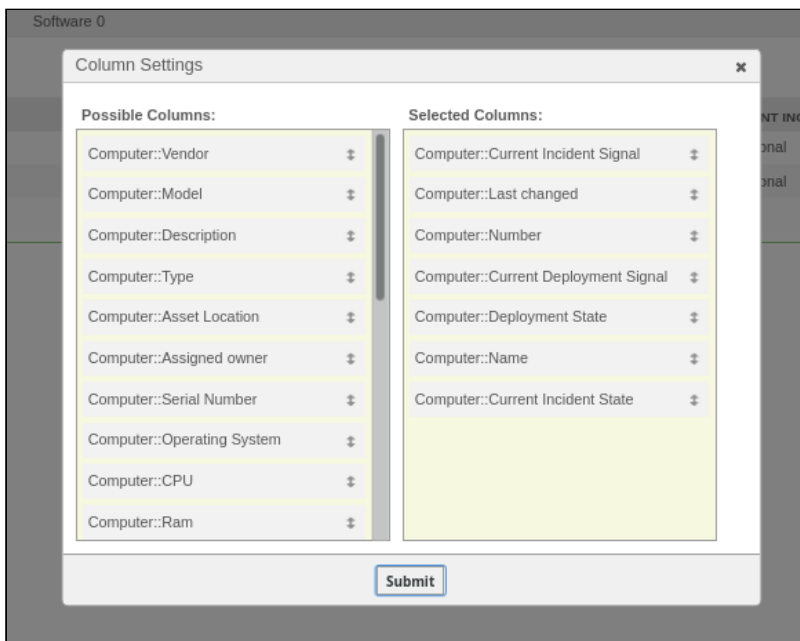
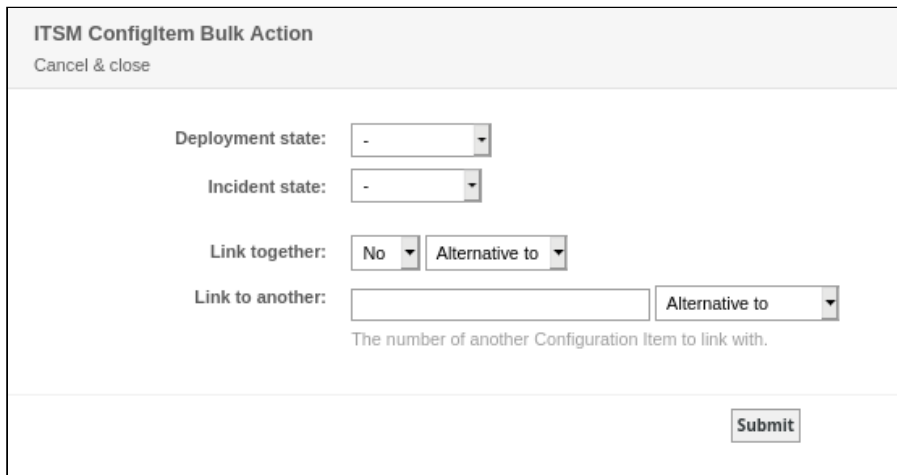


Figure: Column Settings Dialog

- Move columns using drag and drop as desired.
- Click "Submit" button.

## Bulk Action

Use "Bulk" button to change deployment state and incident state of multiple ConfigItems simultaneously, or to create and change links between ConfigItems.



The screenshot shows a dialog box titled "ITSM ConfigItem Bulk Action" with a "Cancel & close" link. It contains four rows of controls:

- Deployment state:** A dropdown menu with a hyphen "-" selected.
- Incident state:** A dropdown menu with a hyphen "-" selected.
- Link together:** Two dropdown menus, the first with "No" selected and the second with "Alternative to" selected.
- Link to another:** A text input field followed by a dropdown menu with "Alternative to" selected. Below this is the text "The number of another Configuration Item to link with."

A "Submit" button is located at the bottom right of the dialog.

Figure: Bulk Action Dialog

### Please note

Make sure that you are allowed to edit all classes that are affected by the collection campaign. Then it is possible to set class-specific attributes over several classes during a collective campaign. If you do not have the authorization to change one of the selected classes, you will not see its class-specific attributes.

### 3.5.2 ConfigItem Zoom View

Clicking a class and ConfigItem in the ConfigItem overview opens the zoom view of said ConfigItem.

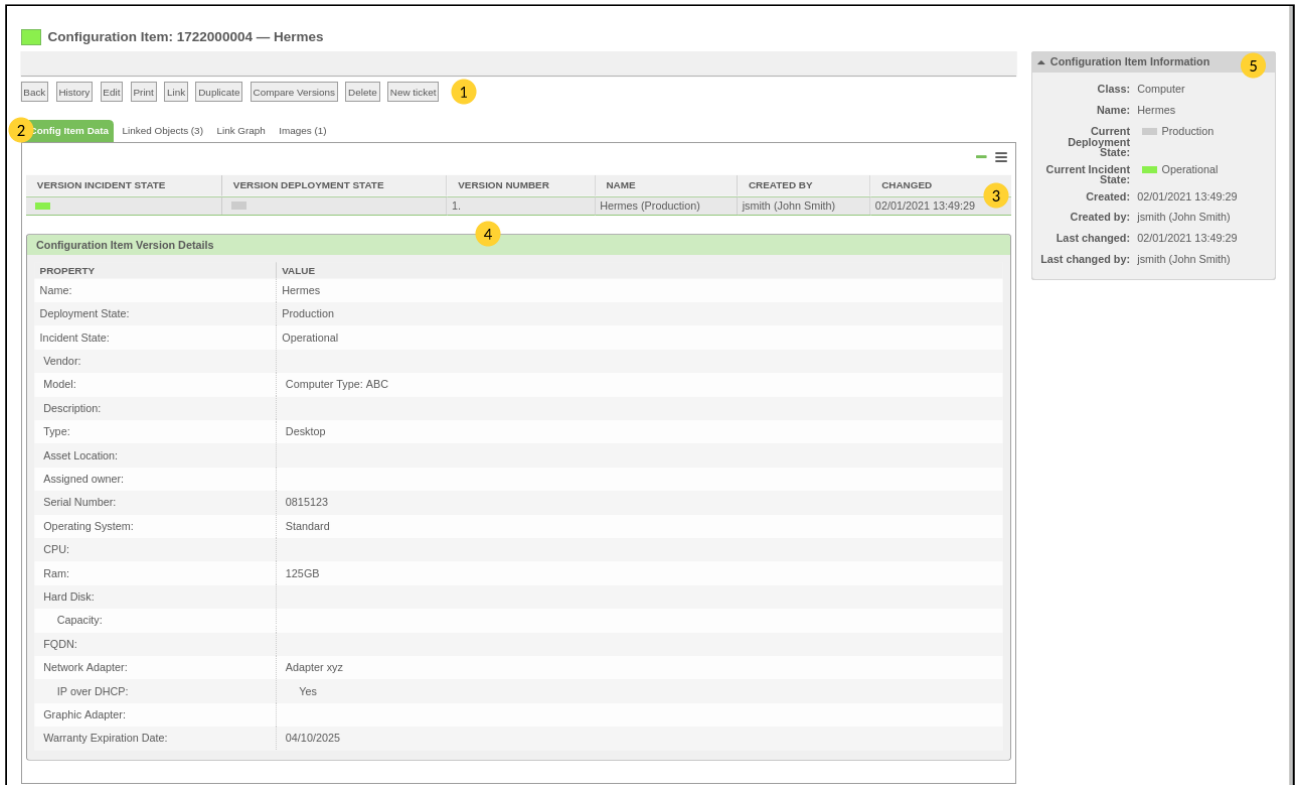


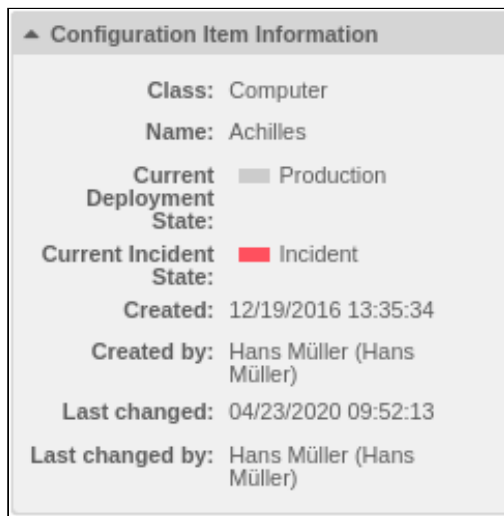
Figure: ConfigItem Zoom View

1	Action buttons
2	Tab bar
3	Version overview
4	Version details
5	Configuration Item Information

## Configuration Item Information

"Configuration Item Information" widget on right shows following data:

- CI class
- CI name
- Current deployment/incident state
- Created/created by
- Last changed/Last changed by



▲ Configuration Item Information

Class: Computer

Name: Achilles

Current Deployment State:  Production

Current Incident State:  Incident

Created: 12/19/2016 13:35:34

Created by: Hans Müller (Hans Müller)

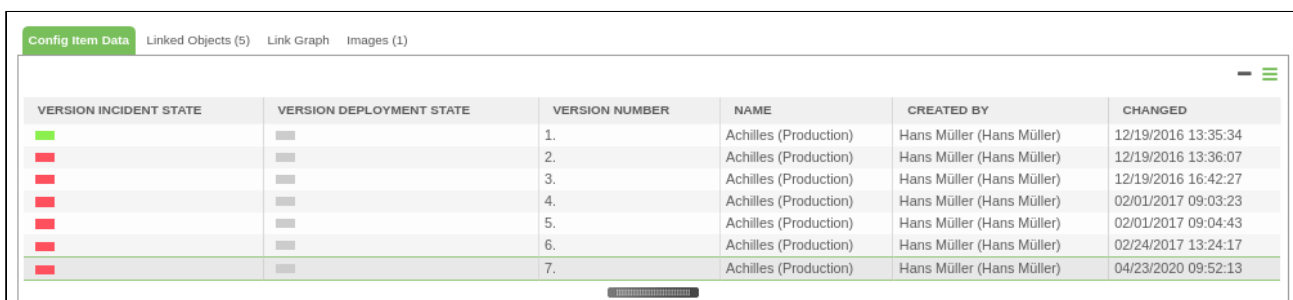
Last changed: 04/23/2020 09:52:13

Last changed by: Hans Müller (Hans Müller)

Figure: Configuration Item Information

## CI Data Tab


Version overview is located in "Config Item Data" tab. Version overview lists individual versions of a ConfigItem below one another. Version details are listed under version overview, such as: name, incident state, type, and other class-specific data for selected version of ConfigItem.



VERSION INCIDENT STATE	VERSION DEPLOYMENT STATE	VERSION NUMBER	NAME	CREATED BY	CHANGED
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1.	Achilles (Production)	Hans Müller (Hans Müller)	12/19/2016 13:35:34
<input checked="" type="checkbox"/>	<input type="checkbox"/>	2.	Achilles (Production)	Hans Müller (Hans Müller)	12/19/2016 13:36:07
<input checked="" type="checkbox"/>	<input type="checkbox"/>	3.	Achilles (Production)	Hans Müller (Hans Müller)	12/19/2016 16:42:27
<input checked="" type="checkbox"/>	<input type="checkbox"/>	4.	Achilles (Production)	Hans Müller (Hans Müller)	02/01/2017 09:03:23
<input checked="" type="checkbox"/>	<input type="checkbox"/>	5.	Achilles (Production)	Hans Müller (Hans Müller)	02/01/2017 09:04:43
<input checked="" type="checkbox"/>	<input type="checkbox"/>	6.	Achilles (Production)	Hans Müller (Hans Müller)	02/24/2017 13:24:17
<input checked="" type="checkbox"/>	<input type="checkbox"/>	7.	Achilles (Production)	Hans Müller (Hans Müller)	04/23/2020 09:52:13

Figure: Version Overview

Current or multiple versions can be shown.

 Click this button to display all versions.

 Click this button to display current version only

## Linked Objects Tab

"Linked Objects" tab shows all objects linked with a ConfigItem. These can be tickets, other ConfigItems, services, or FAQ articles.

Object types are displayed grouped, as a widget. If widget is closed, click on XX symbol to expand it.

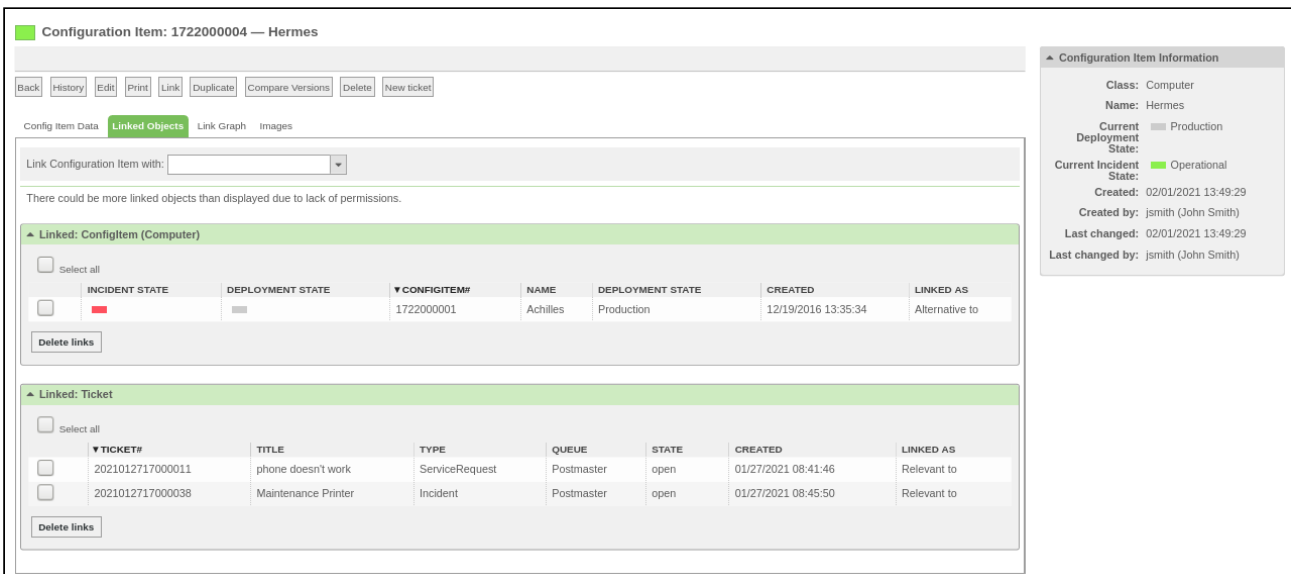


Figure: ConfigItem, Linked Objects

Use Quicklink function to create additional links quickly.

- Select object from "Link Configuration Item with" selection list.
  - Select link type from "Link type" selection list.
  - Click "Submit" button.
- Selected objects are now linked to one another and visible in "Linked Objects" tab.

## Link Graph Tab

In the "Link graph" tab you can see all links of a ConfigItem in an interactive, graphic representation. Link depths of up to 9 levels can be displayed. Adjusting strength defines the quality of the adjusting. If, in cases of complex assignments, adjustment cannot be carried out, adjusting strength should be reduced if need be.

When you click on the gearwheel, the "Configuration graph display" widget opens. You can influence the display of the graph and define templates for displaying the graph.

- Max. Link depth: Defines the sub-level up to which the objects are displayed in the graph.
- Link types to be tracked: Determines which link types are shown in the graph.

- CI classes to be considered: Specifies which CI classes are shown in the graph.
- Alignment Strength: Defines the quality of the alignment.

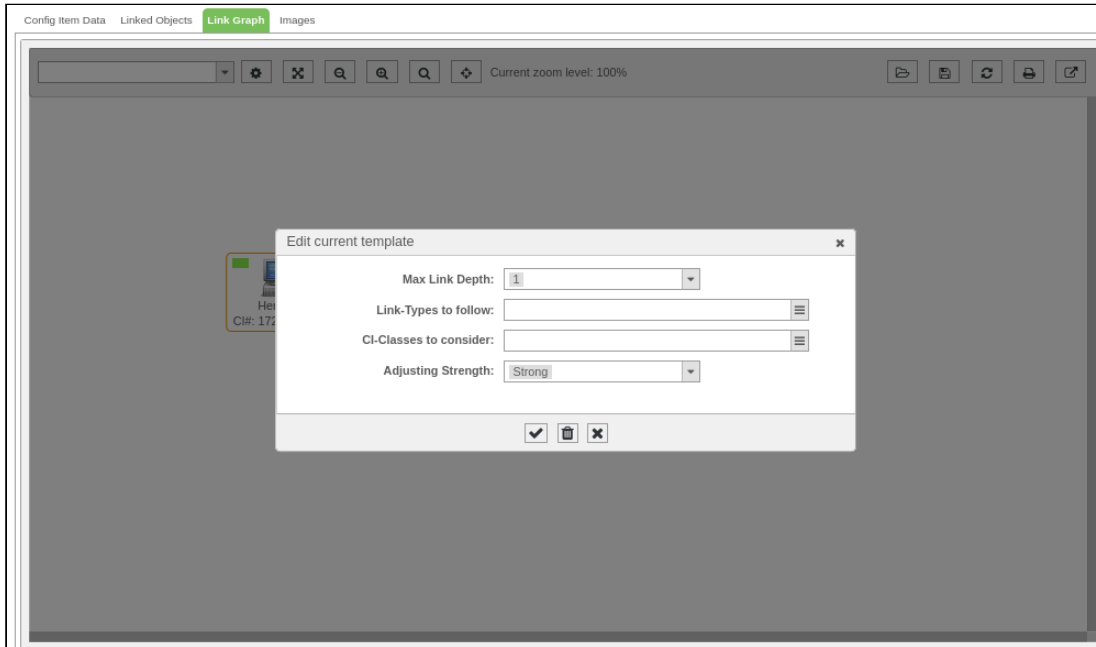


Figure: Graph View Configuration

**Hint**

Templates can also be predefined in SysConfig.  
To do this, go to the *ITSM* group in *SysConfig* and then to the *ITSMConfigItem :: LinkGraph :: Templates* subgroup.

- *CIGraphConfigTemplate ### Name*
  - View configuration name (unique)
- *CIGraphConfigTemplate ### Permission*
  - Restriction based on the authorization group (RO)
- Content of the view configuration
  - *CIGraphConfigTemplate ### MaxSearchDepth*
    - max. link depth
  - *CIGraphConfigTemplate ### RelevantLinkTypes*
    - Link types to track
  - *CIGraphConfigTemplate ### RelevantObjectSubTypes*
    - CI classes to be considered
  - *CIGraphConfigTemplate ### AdjustingStrength*
    - Alignment Strength

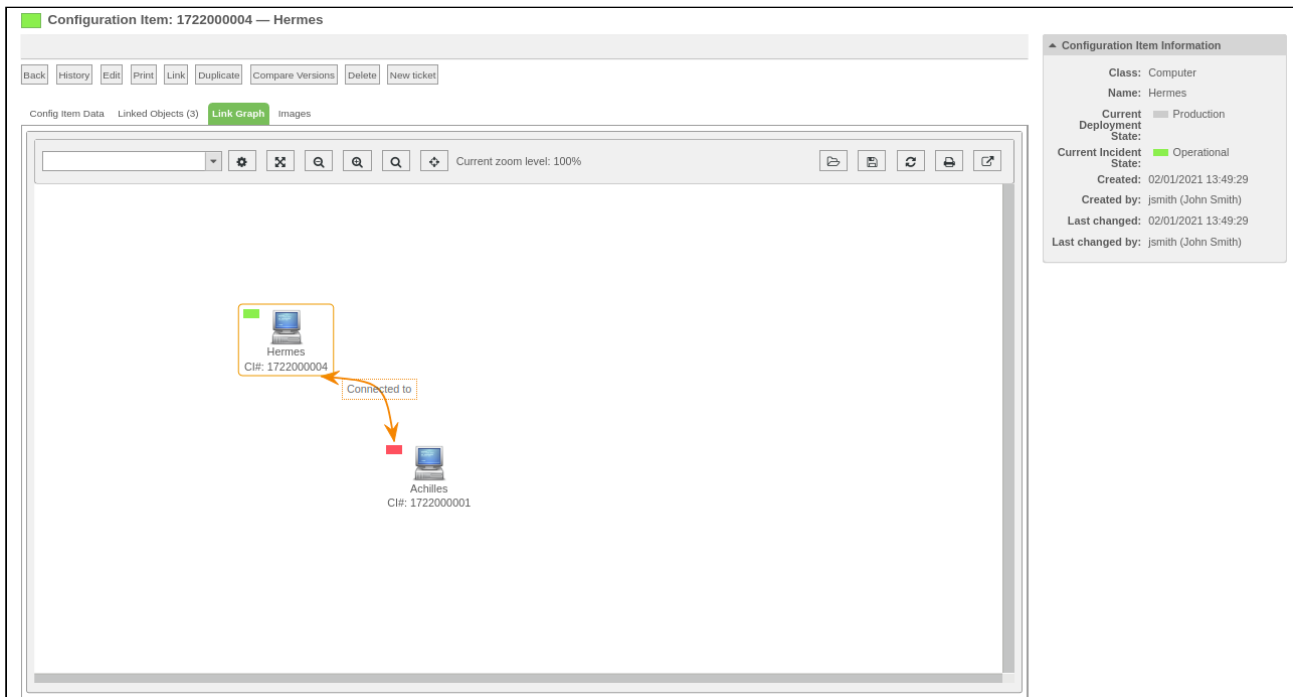


Figure: "Link Graph" Tab

The view can

- can be fitted into the visible area.
- can be reduced or enlarged.
- can be enlarged or zoomed to 100%.

In addition, can

- a graph can be loaded.
- the graph can be saved, aligned or printed.
- the graph can be opened in a separate window.

Saved graphs can be reloaded. The graph configuration of the saved graph is used and, if necessary, displayed with the new link situation.

This means that known CIs (which were already set when saving) are set back to the saved positions and previously unknown CIs have to be aligned manually. You will also receive a list of newly added CIs or removed CIs in a pop-up.

You can move the CIs in the graph using drag and drop. If you right-click on a CI, a menu opens with options for linking and displaying the CI details:



If you click on a connection with the left mouse button (the rectangle with the type of connection), a dialog for changing or deleting the connection opens:

You can recognize an open ConfigurationItem by the orange frame. If you click on another ConfigItem in the view, you will get to the "Link Graph" tab of this ConfigItem. In this case, the same graph configuration is used and a graph is created based on this CI. This allows you to move through the graph node by node.

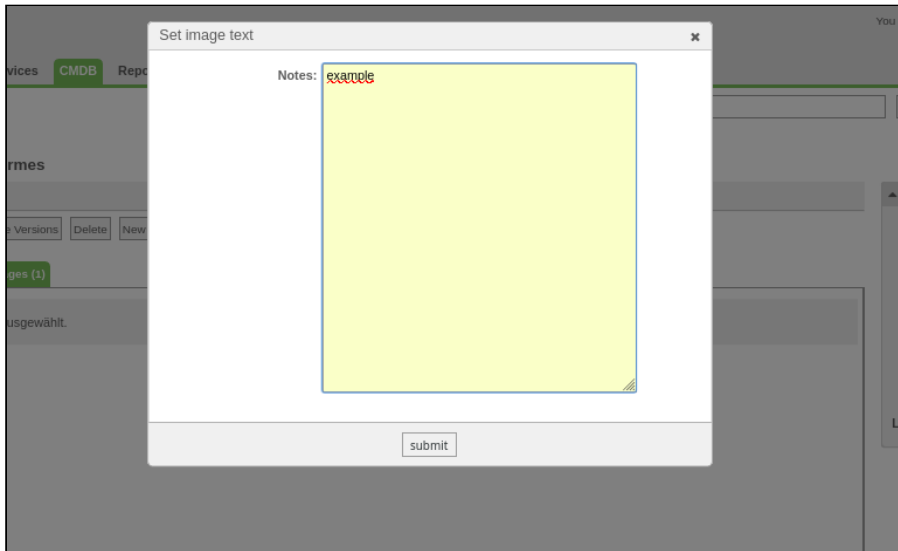
## Images Tab

In "Images" tab, images for ConfigItem can be seen (if applicable) and additional images (png, jpg, GIF, TIFF, bmp) can be added to ConfigItem. Notes can be added to images.



Figure: "Images" Tab

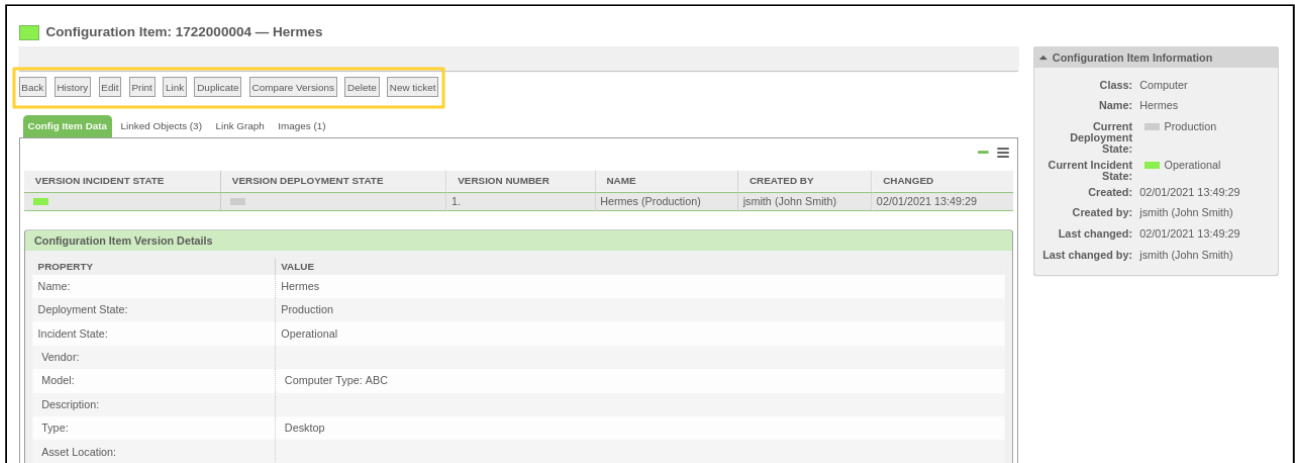
- Click "Durchsuchen" button.
- Select file location.
- If need be, add image text.



- Click "Submit" button.

### 3.5.3 ConfigItem Actions

ConfigItem actions are available in the zoom view of a ConfigItem.



**Configuration Item: 1722000004 — Hermes**

Back | History | Edit | Print | Link | Duplicate | Compare Versions | Delete | New ticket

Config Item Data | Linked Objects (5) | Link Graph | Images (1)

VERSION INCIDENT STATE	VERSION DEPLOYMENT STATE	VERSION NUMBER	NAME	CREATED BY	CHANGED
		1.	Hermes (Production)	jsmith (John Smith)	02/01/2021 13:49:29

**Configuration Item Version Details**

PROPERTY	VALUE
Name:	Hermes
Deployment State:	Production
Incident State:	Operational
Vendor:	
Model:	Computer Type: ABC
Description:	
Type:	Desktop
Asset Location:	

**Configuration Item Information**

- Class: Computer
- Name: Hermes
- Current Deployment State:  Production
- Current Incident State:  Operational
- Created: 02/01/2021 13:49:29
- Created by: jsmith (John Smith)
- Last changed: 02/01/2021 13:49:29
- Last changed by: jsmith (John Smith)

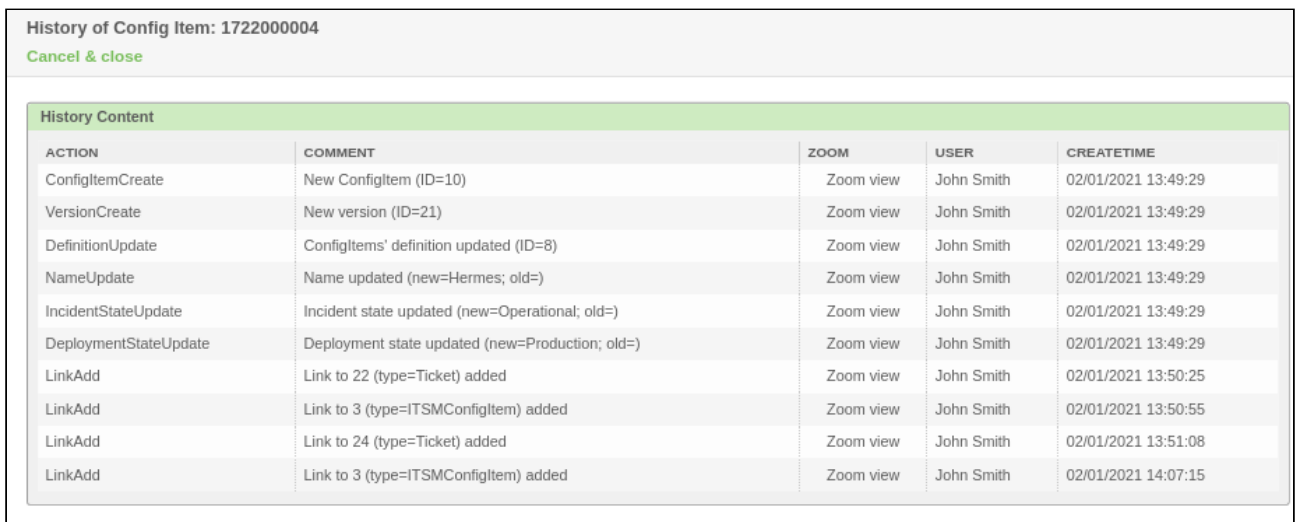
Figure: Action Buttons

#### Back

Back to overview page

#### History

Shows overview of all editing steps which have been implemented on ConfigItem so far.



**History of Config Item: 1722000004**

Cancel & close

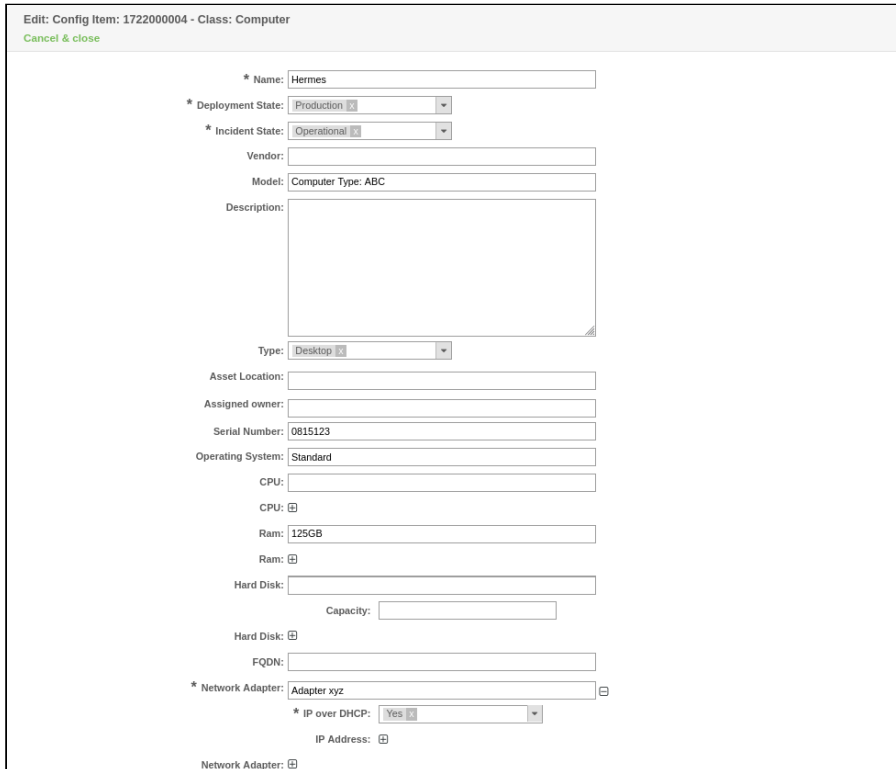
**History Content**

ACTION	COMMENT	ZOOM	USER	CREATETIME
ConfigItemCreate	New ConfigItem (ID=10)	Zoom view	John Smith	02/01/2021 13:49:29
VersionCreate	New version (ID=21)	Zoom view	John Smith	02/01/2021 13:49:29
DefinitionUpdate	ConfigItems' definition updated (ID=8)	Zoom view	John Smith	02/01/2021 13:49:29
NameUpdate	Name updated (new=Hermes; old=)	Zoom view	John Smith	02/01/2021 13:49:29
IncidentStateUpdate	Incident state updated (new=Operational; old=)	Zoom view	John Smith	02/01/2021 13:49:29
DeploymentStateUpdate	Deployment state updated (new=Production; old=)	Zoom view	John Smith	02/01/2021 13:49:29
LinkAdd	Link to 22 (type=Ticket) added	Zoom view	John Smith	02/01/2021 13:50:25
LinkAdd	Link to 3 (type=ITSMConfigItem) added	Zoom view	John Smith	02/01/2021 13:50:55
LinkAdd	Link to 24 (type=Ticket) added	Zoom view	John Smith	02/01/2021 13:51:08
LinkAdd	Link to 3 (type=ITSMConfigItem) added	Zoom view	John Smith	02/01/2021 14:07:15

Figure: History Widget

## **Edit**

Opens dialog for editing ConfigItem:



The screenshot shows a dialog box titled "Edit: Config Item: 172200004 - Class: Computer" with a "Cancel & close" button. The form contains the following fields:

- \* Name: Hermes
- \* Deployment State: Production
- \* Incident State: Operational
- Vendor:
- Model: Computer Type: ABC
- Description: (text area)
- Type: Desktop
- Asset Location:
- Assigned owner:
- Serial Number: 0815123
- Operating System: Standard
- CPU:
- CPU: (checkbox)
- Ram: 125GB
- Ram: (checkbox)
- Hard Disk:
- Capacity: (text input)
- Hard Disk: (checkbox)
- FQDN:
- \* Network Adapter: Adapter xyz
- \* IP over DHCP: Yes
- IP Address: (checkbox)
- Network Adapter: (checkbox)

Figure: Edit ConfigItem Dialog

## **Print**

Creates printout of ConfigItem data.

## **Link**

Opens dialog for creating links with other ConfigItems:

**Link Object: ConfigItem# 1722000004: Hermes**  
 Close dialog or go to link delete screen

**Select Target Object**

Link object ConfigItem# 1722000004 with:

**Search**

ConfigItem#:

Name:

Deployment State:

Incident State:

Figure: Create Links Dialog

### Duplicate

Calls up dialog for duplicating ConfigItem. Here it is possible to create changes to the duplicate.

**Edit: Config Item: New - Class: Computer**  
 Cancel & close

\* Name:

\* Deployment State:

\* Incident State:

Vendor:

Model:

Description:

Type:

Asset Location:

Assigned owner:

Serial Number:

Operating System:

CPU:

CPU:

Ram:

Ram:

Hard Disk:

Capacity:

Hard Disk:

FQDN:

\* Network Adapter:

\* IP over DHCP:

Figure: Duplicate Dialog

### **Compare Versions**

Compares two versions of a ConfigItem and highlights differences between them in color.

- In left and right selection list, check box next to version you wish to compare.
- Click "Compare" button.

Versions will be compared and shown next to each other with their properties in the widget.

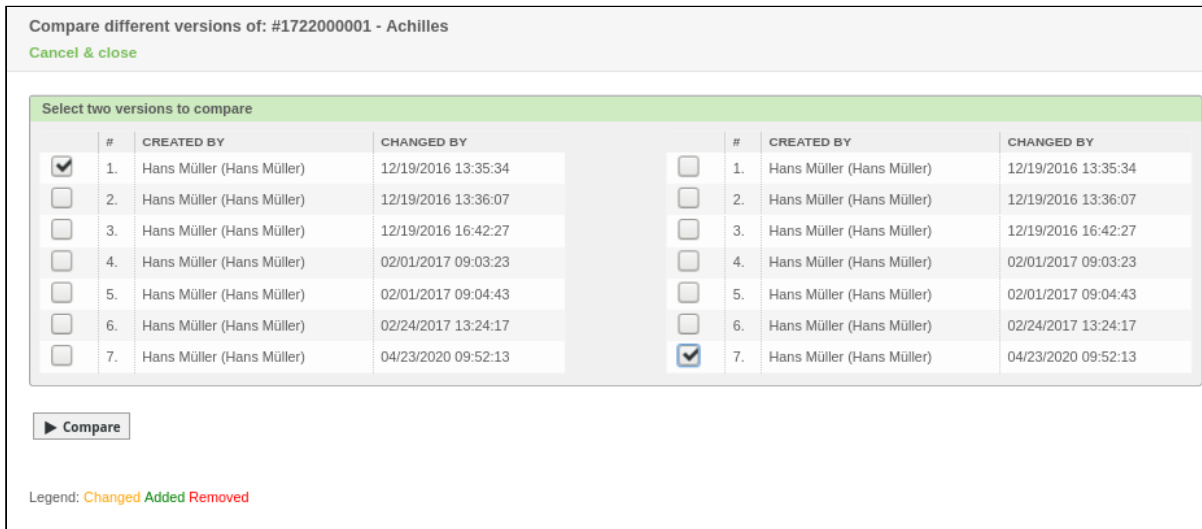


Figure: Compare Versions Widget

Green entries = Added

Red entries = Removed

Yellow entries = Changed

### **New Ticket**

Creates new email ticket with automatic link between ConfigItem and ticket.

### **Allocated Tickets**

Function lists all tickets which were entered (allocated) as time accounting reference on this ConfigItem. In factory settings, these can only be ConfigItems from "Project" and "Workpackage" classes.

### 3.5.4 Creating ConfigItems

- In "CMDB" area of menu bar, click "New" entry.
- A widget with list of ConfigItem classes opens.

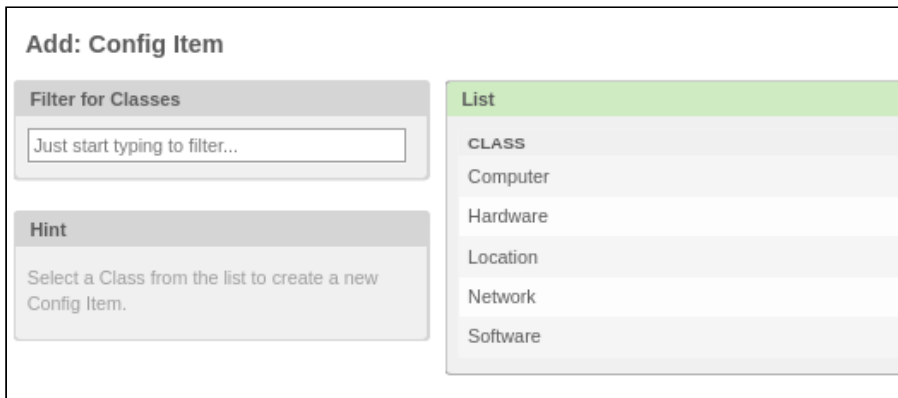


Figure: CI Classes Selection

- Click an entry in list.
- Dialog with various input fields opens.

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

\* Name:

\* Deployment State:

\* Incident State:

Vendor:

Model:

Description:

Type:

Asset Location:

Assigned owner:

Serial Number:

Operating System:

CPU:

CPU:

Ram:

Ram:

Hard Disk:

Capacity:

Hard Disk:

FQDN:

\* Network Adapter:

\* IP over DHCP:

IP Address:

Network Adapter:

Graphic Adapter:

Figure: Edit ConfigItem Dialog

- Input fields differ depending on selected class.
- Enter your information for ConfigItem in input fields.
- Click "Submit" button.



### 3.5.5 Searching for ConfigItems

Clicking "Search" menu item in "CMDB" menu allows you to search for ConfigItems or create search templates for searching for ConfigItems.

#### **Search ConfigItems**

- In "CMDB" menu, click "Search" entry.
- If need be, select class from selection list, or select "All" if you wish to search in all classes.

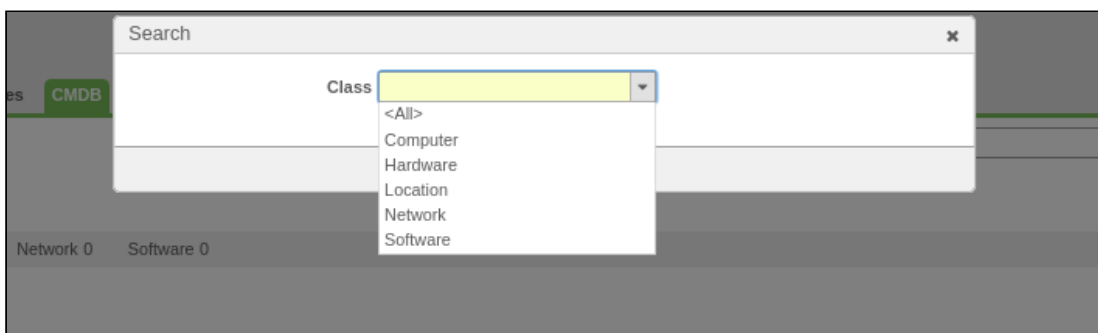


Figure: Search for ConfigItem Dialog

- In "Filters in use" area, enter search term in input field.
- If need be, an additional filter attribute can be selected from the selection list under "Additional filters".

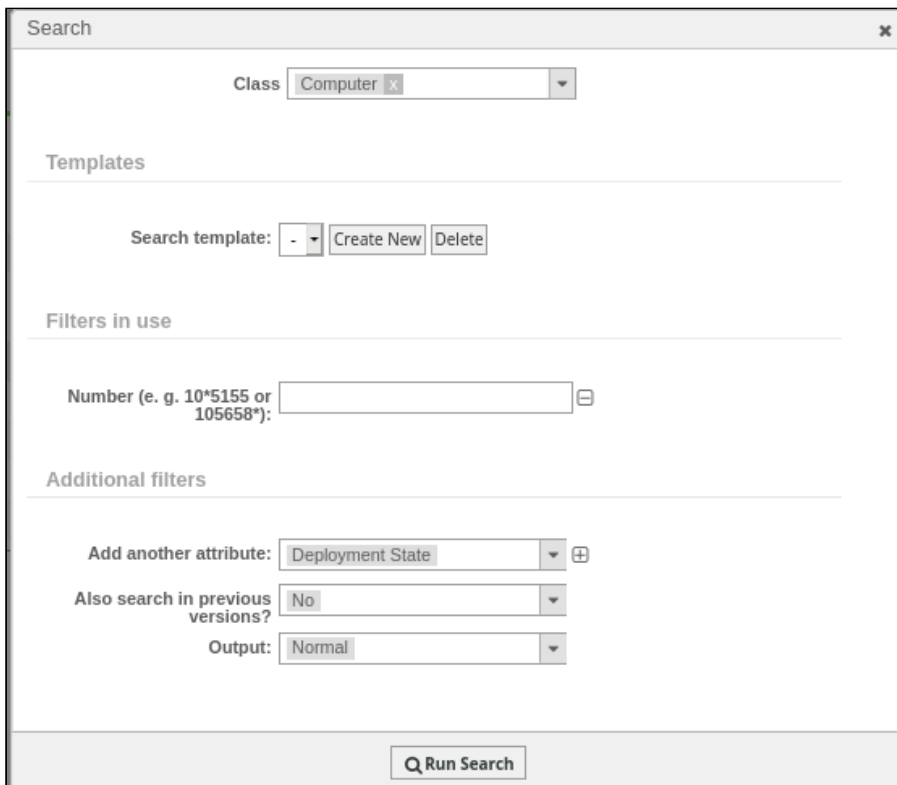




Figure: Search for ConfigItem Dialog

- If need be, add additionally selected filter using  to "Filters in use" area.
- If need be, select "Yes" for "Also search in previous versions?" if you wish to search in all versions of ConfigItem.
- If need be, select "CSV" or "Print" under "Output".
- Click "Run Search" button.

### **Creating Search Template**

- Click "Create New" button.
  - Enter designation in input field.
  - Click "Create New Template" button.
  - In "Add another attribute" area, select filter attribute from selection list.
  - Use  button to add filter attribute to "Filters in use" area.
  - Click "Run Search" button.
- Search will be carried out and used filter attributes will be saved as search template.

## 3.6 Module: Reports

Using the reports function allows you to create comprehensive and individual statistics for existing tickets, CIs, FAQ items, and others. Statistics can be output as a CSV file or a PDF file.

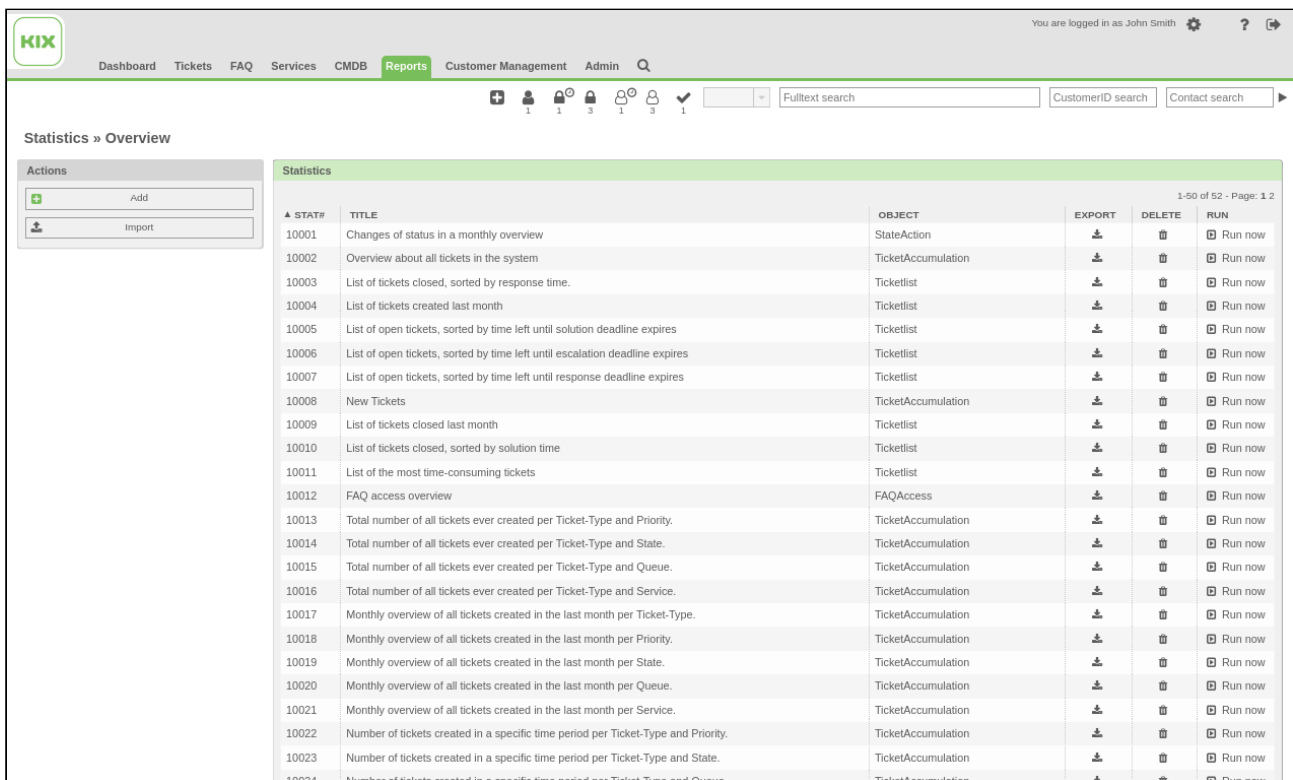
The following statistics types are available:

**Dynamic Matrix:** creates a matrix with calculated data values in every cell. Here, every cell has.

**Dynamic List:** creates table using existing data. Every row corresponds to one object (e.g. ticket) with its respective attributes (e.g. title, priority, queue, etc.). This type is suitable, for example, if you would like an overview of your database.

**Static:** generates complex statistics which are not configurable, or only configurable to a limited degree, and which may not produce results in table form. The basis for static reports is individually developed modules which are incorporated in the frontend via this item.

Selecting "Statistics" in the "Reports" menu opens an overview with existing statistics.




STATS	TITLE	OBJECT	EXPORT	DELETE	RUN
10001	Changes of status in a monthly overview	StateAction	↓	🗑️	🏃 Run now
10002	Overview about all tickets in the system	TicketAccumulation	↓	🗑️	🏃 Run now
10003	List of tickets closed, sorted by response time.	Ticketlist	↓	🗑️	🏃 Run now
10004	List of tickets created last month	Ticketlist	↓	🗑️	🏃 Run now
10005	List of open tickets, sorted by time left until solution deadline expires	Ticketlist	↓	🗑️	🏃 Run now
10006	List of open tickets, sorted by time left until escalation deadline expires	Ticketlist	↓	🗑️	🏃 Run now
10007	List of open tickets, sorted by time left until response deadline expires	Ticketlist	↓	🗑️	🏃 Run now
10008	New Tickets	TicketAccumulation	↓	🗑️	🏃 Run now
10009	List of tickets closed last month	Ticketlist	↓	🗑️	🏃 Run now
10010	List of tickets closed, sorted by solution time	Ticketlist	↓	🗑️	🏃 Run now
10011	List of the most time-consuming tickets	Ticketlist	↓	🗑️	🏃 Run now
10012	FAQ access overview	FAQAccess	↓	🗑️	🏃 Run now
10013	Total number of all tickets ever created per Ticket-Type and Priority.	TicketAccumulation	↓	🗑️	🏃 Run now
10014	Total number of all tickets ever created per Ticket-Type and State.	TicketAccumulation	↓	🗑️	🏃 Run now
10015	Total number of all tickets ever created per Ticket-Type and Queue.	TicketAccumulation	↓	🗑️	🏃 Run now
10016	Total number of all tickets ever created per Ticket-Type and Service.	TicketAccumulation	↓	🗑️	🏃 Run now
10017	Monthly overview of all tickets created in the last month per Ticket-Type.	TicketAccumulation	↓	🗑️	🏃 Run now
10018	Monthly overview of all tickets created in the last month per Priority.	TicketAccumulation	↓	🗑️	🏃 Run now
10019	Monthly overview of all tickets created in the last month per State.	TicketAccumulation	↓	🗑️	🏃 Run now
10020	Monthly overview of all tickets created in the last month per Queue.	TicketAccumulation	↓	🗑️	🏃 Run now
10021	Monthly overview of all tickets created in the last month per Service.	TicketAccumulation	↓	🗑️	🏃 Run now
10022	Number of tickets created in a specific time period per Ticket-Type and Priority.	TicketAccumulation	↓	🗑️	🏃 Run now
10023	Number of tickets created in a specific time period per Ticket-Type and State.	TicketAccumulation	↓	🗑️	🏃 Run now
10024	Number of tickets created in a specific time period per Ticket-Type and Queue.	TicketAccumulation	↓	🗑️	🏃 Run now

Figure: Statistics Overview Widget

Clicking a column header sorts values in said column in ascending or descending order. Symbols XX and XX show sorting order.

Use  button to export statistics as XML file.

Use  button to delete statistics.

Clicking on an entry in "STAT#" column allows a statistic to be edited.

### 3.6.1 Running statistic

- Select statistic from overview and click "Run Now" button.  
New widget with settings will open.

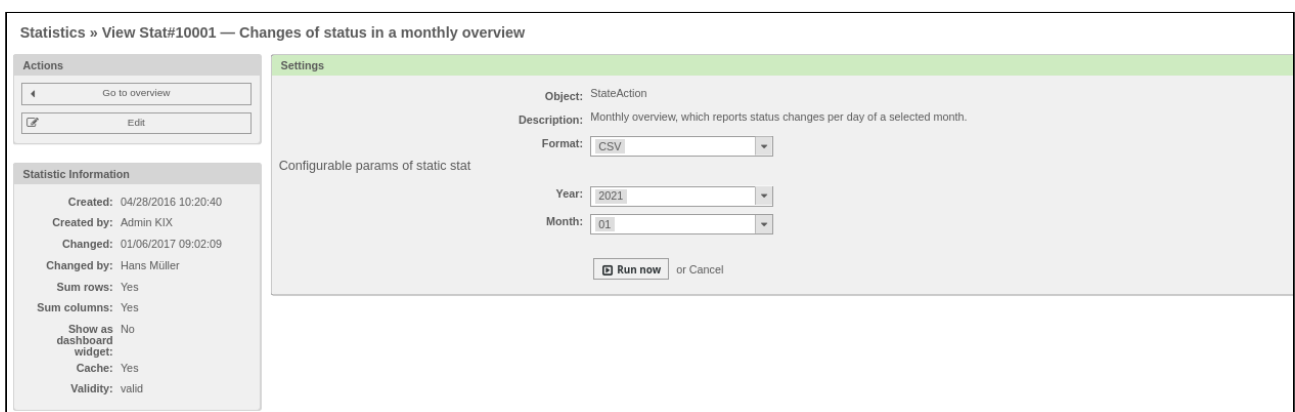


Figure: Statistic Settings

- Select output format.
- If need be, set your desired parameters, e.g. time period.  
Click "Run Now" button.

### 3.6.2 Defining new statistic

- In overview, click "Add" button.  
"Add New Statistic" widget opens.

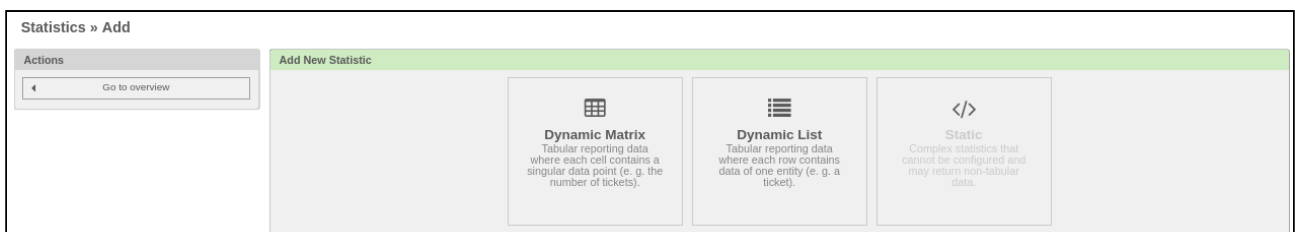


Figure: Add Statistic Widget

- Select type of statistic (Dynamic Matrix, Dynamic List, Static).  
Widget with parameter settings opens.

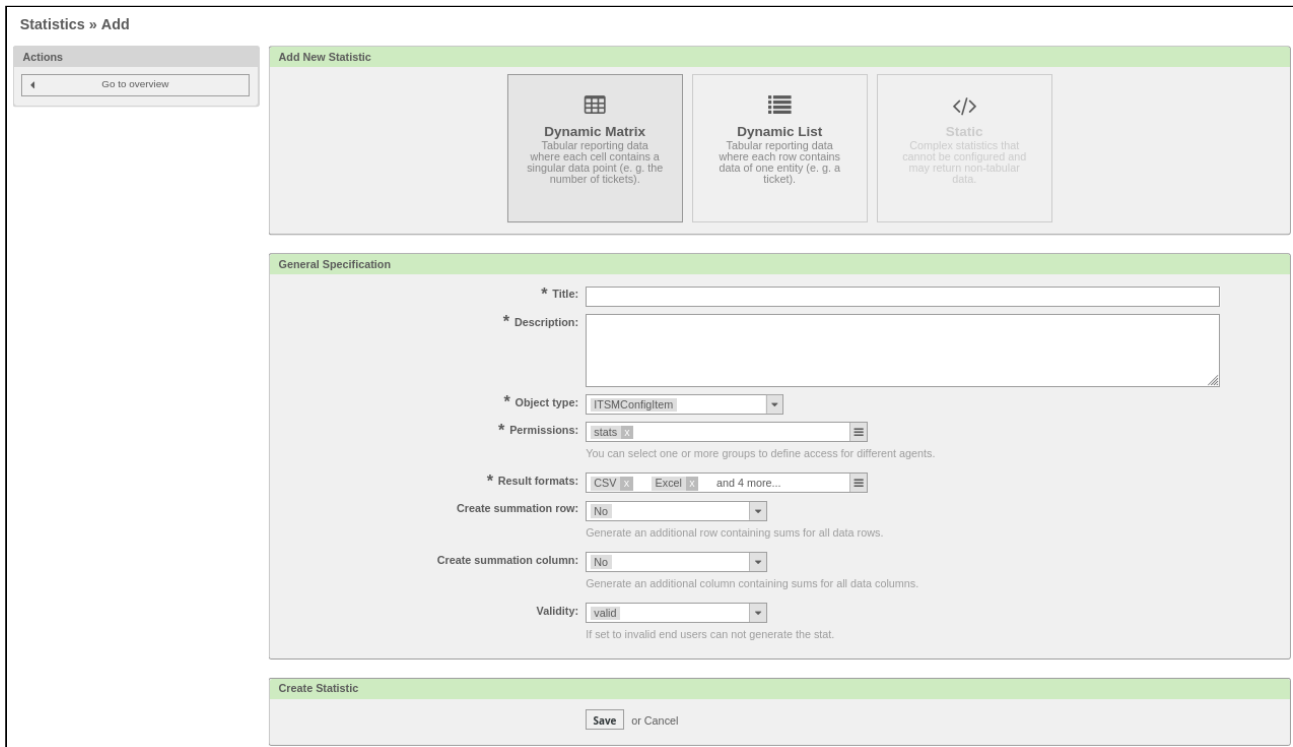


Figure: Statistic Parameters Widget

- Click "Save" button.  
Statistic is created and you are taken to editing screen.

### 3.6.3 Editing statistic

- Define new statistic or click statistic number of existing statistic in overview.  
Widget with Statistics Preview opens.

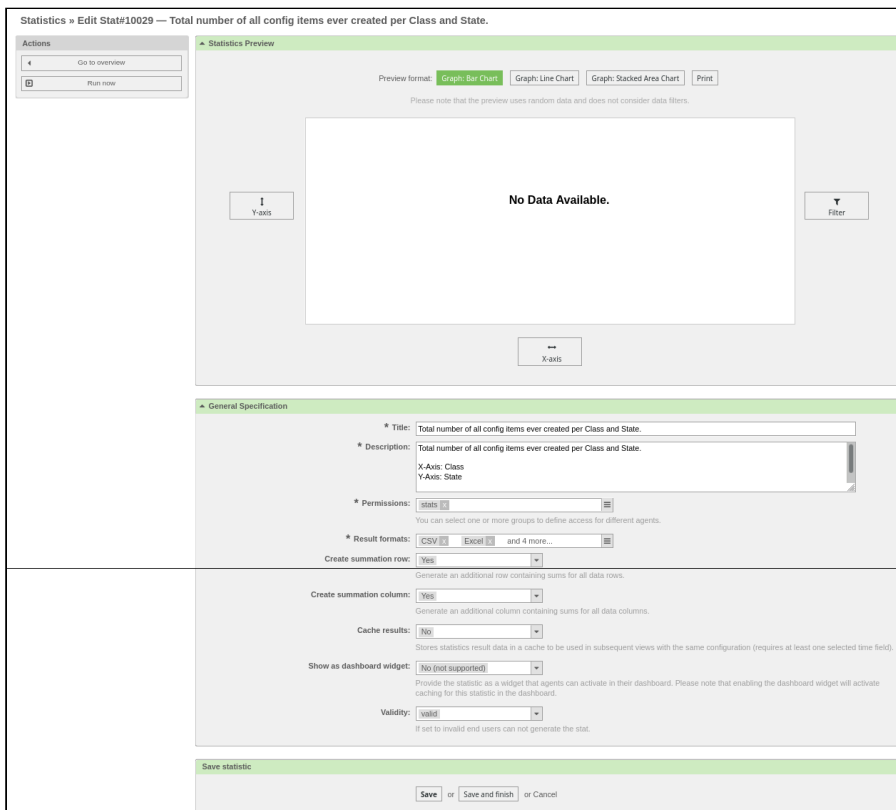
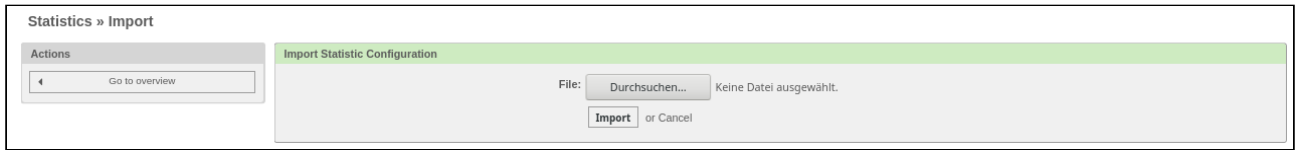


Figure: Statistics Preview Widget

- Click "X-axis" button.  
Widget for configuring X-axis opens.
- Select value for X-axis.
- Click "Save" button.
- Click "Y-axis" button.  
Widget for configuring Y-axis opens.
- Select value for Y-axis.  
Click "Save" button.

### 3.6.4 Importing Statistic Configuration

- In overview, click "Import" button.  
Widget for importing statistic configuration opens.



*Figure: Import Statistic Configuration Dialog*

- Click "Durchsuchen" button.
- Select import file and click "Import" button.



## 3.7 Module: Customer Management

With the module "Customer Management" you can create new customers, edit existing customers and display the ticket history of the individual customers.

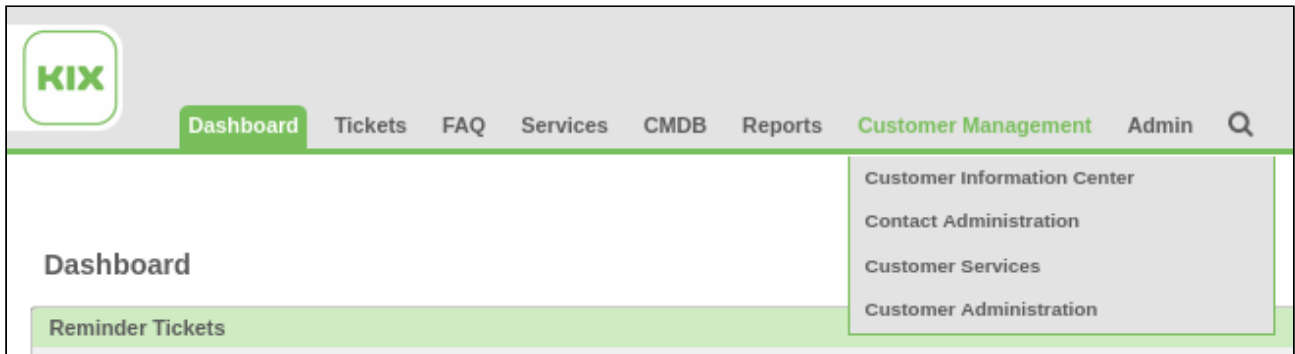


Figure: Customer administration module - menu



### 3.7.1 Contact Administration

With the menu item "Contact Administration" in the "Customer Management" menu, you can search or edit contacts, as well as add new ones.

If you select the menu item "Contact Administration", an overview - Contact Management - opens with any existing contacts.

**Contact Management**

**Actions**

Wildcards like "\*" are allowed.

Database Backend:

---

**Hint**

Contact are needed to have a customer history and to login via customer panel.

List (5 total)

USERNAME	NAME	EMAIL	CUSTOMERID	LAST LOGIN	VALIDITY
Hans Müller	Herr Max Muster	fake@fake.com	123456789	04/24/2020 06:07	valid
hmustermann	Hans Mustermann	hmustermann@musterwelt.de	hamu	10/15/2020 11:06	valid
jochenk	Jochen Krämer	jochenk@abc.de	0423		valid
kevinschmidt	Herr Kevin Schmidt	kevinschmidt@fake.com	987654321	02/01/2017 13:30	valid
t.fröhlich	Thomas Fröhlich	tf@meinefirma.de	4711		valid

Figure: Contact Management

#### Searching for Contact

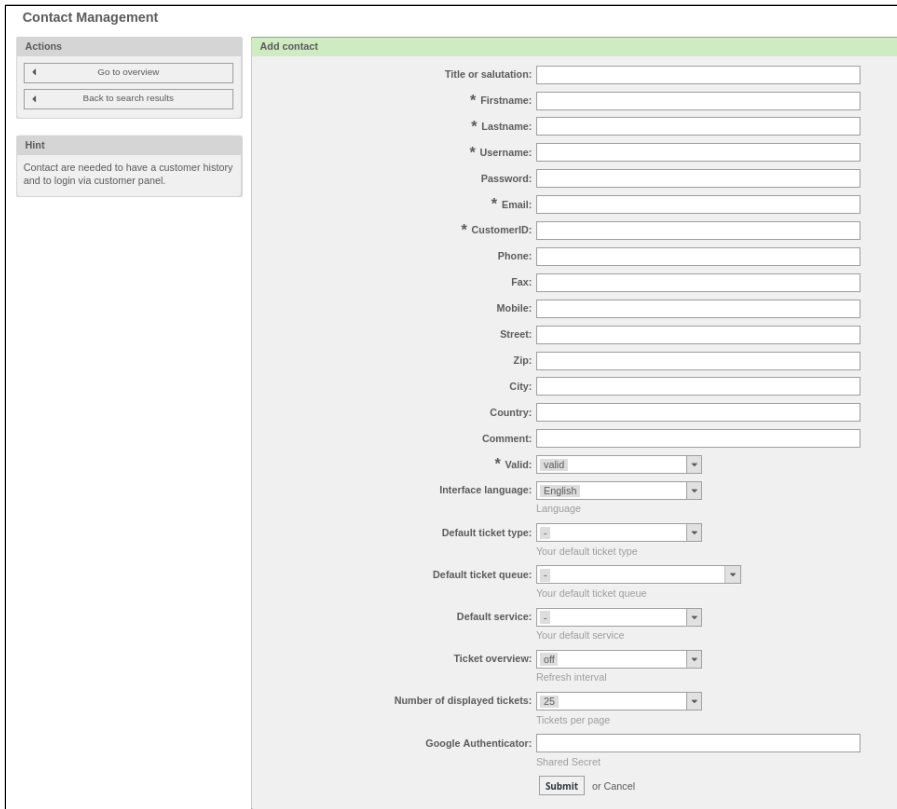
- Enter search term in "Actions" widget input field.
- Click  symbol.

**Hint**

Wildcards like "\*" are allowed, if you only know or want to search for a part of a search term, for example "\*a".

#### Adding Contact

- If need be, select a backend in "Actions" widget.
  - Click "Add contact" button.
- Widget with input fields for contact information appears.



**Contact Management**

**Actions**

Go to overview

Back to search results

**Hint**

Contact are needed to have a customer history and to login via customer panel.

**Add contact**

Title or salutation:

\* Firstname:

\* Lastname:

\* Username:

Password:

\* Email:

\* CustomerID:

Phone:

Fax:

Mobile:

Street:

Zip:

City:

Country:

Comment:

\* Valid:

Interface language:

Language

Default ticket type:

Your default ticket type

Default ticket queue:

Your default ticket queue

Default service:

Your default service

Ticket overview:

Refresh interval

Number of displayed tickets:

Tickets per page

Google Authenticator:

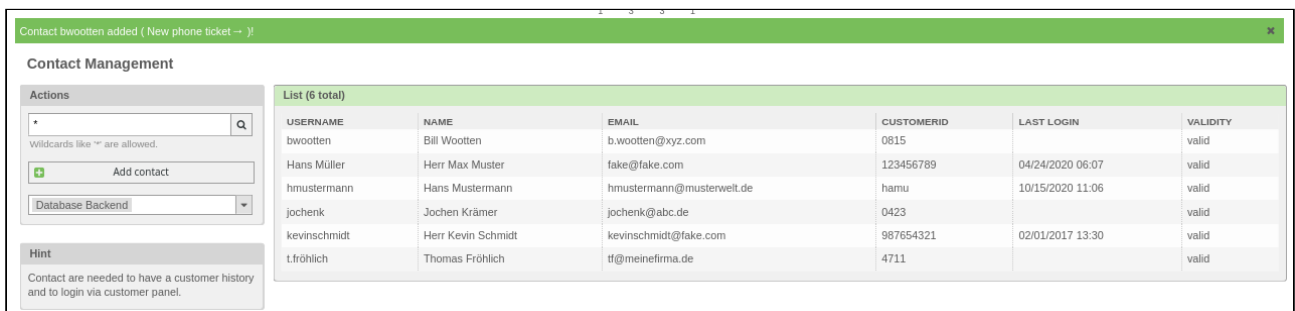
Shared Secret

or Cancel

Figure: Add Contact Widget

- Enter relevant information.
- Click "Submit" button.

New contact will be added to list.



Contact bwootten added ( New phone ticket → )

**Contact Management**

**Actions**

Wildcards like ~ are allowed.

Add contact

Database Backend

**Hint**

Contact are needed to have a customer history and to login via customer panel.

**List (6 total)**

USERNAME	NAME	EMAIL	CUSTOMERID	LAST LOGIN	VALIDITY
bwootten	Bill Wootten	b.wootten@xyz.com	0615		valid
Hans Müller	Herr Max Muster	fake@fake.com	123456789	04/24/2020 06:07	valid
hmustermann	Hans Mustermann	hmustermann@musterwelt.de	hamu	10/15/2020 11:06	valid
jochenk	Jochen Krämer	jochenk@abc.de	0423		valid
kevinschmidt	Herr Kevin Schmidt	kevinschmidt@fake.com	987654321	02/01/2017 13:30	valid
t.fröhlich	Thomas Fröhlich	tf@meinefirma.de	4711		valid

Figure: List of Contacts

In the standard system, the number of possible login attempts is 3. Then the contact login is blocked. To unblock a blocked contact, you must select the value "No" again in the "Edit contact" widget in the "Block login" field.

## Editing Contact

- In list, click on username of contact you wish to edit.

**Contact Management**

**Actions**

\*

Wildcards like \* are allowed.

---

**Hint**

Contact are needed to have a customer history and to login via customer panel.

**List (6 total)**

USERNAME	NAME	EMAIL	CUSTOMERID	LAST LOGIN	VALIDITY
bwootten	Bill Wootten	b.wootten@xyz.com	0815		valid
Hans Müller	Herr Max Muster	fake@fake.com	123456789	04/24/2020 06:07	valid
hmustermann	Hans Mustermann	hmustermann@musterwelt.de	hamu	10/15/2020 11:06	valid
jochenk	Jochen Krämer	jochenk@abc.de	0423		valid
kevinschmidt	Herr Kevin Schmidt	kevinschmidt@fake.com	987654321	02/01/2017 13:30	valid
t.fröhlich	Thomas Fröhlich	tf@meinefirma.de	4711		valid

A widget for input fields for customer information appears.

**Edit contact**

Title or salutation:

\* Firstname:

\* Lastname:

\* Username:

Password:

\* Email:

\* CustomerID:

Phone:

Fax:

Mobile:

Street:

Zip:

City:

Country:

Comment:

\* Valid:

Interface language:

Language

Default ticket type:

Your default ticket type

Default ticket queue:

Your default ticket queue

Default service:

Your default service

Ticket overview:

Refresh interval

Number of displayed tickets:

Tickets per page

Google Authenticator:

Shared Secret

or

Figure: Edit Contact Widget



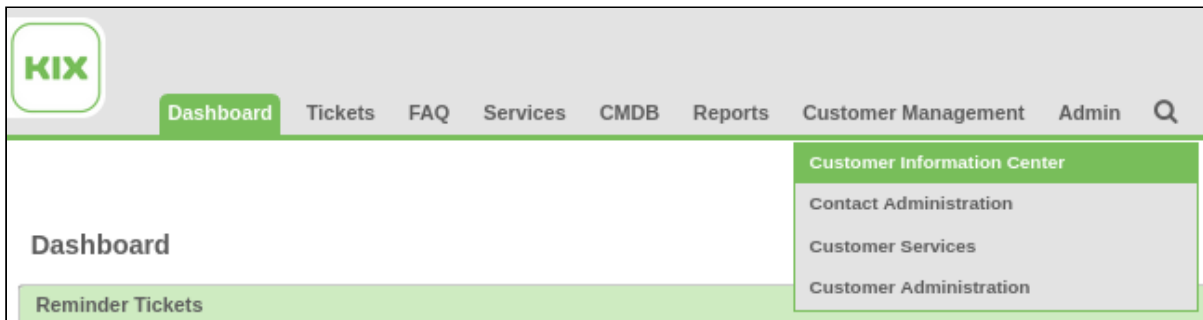
- Enter relevant contact information.
  - Click "Submit" button.
- New contact will be added to list.

### 3.7.2 Customer Information Center

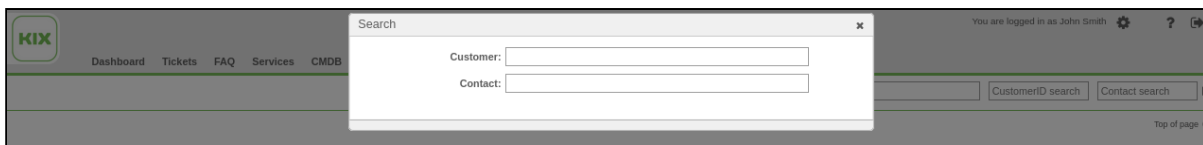
Use the "Customer Information Center" module function to display request history, customer data, services, tickets, and CIs of a customer.

#### Displaying Request History

- In "Customer Management" menu, click "Customer Information Center" menu item.



A pop-up appears.



- In "Customer" input field, enter company designation or company ID.

**OR:**

- In "Contact" input field, enter surname, first name, or email address.
- If search criterion matches part of customer information, matching results will be listed under search field.
- Click an entry.

All information linked to customer or contact will be displayed in an overview:

Customer Information Center — Muster G.m.b.H (123456789)

**Contacts**

CONTACT LOGIN	CONTACT INFORMATION	OPEN	CLOSED	TICKET	EDIT
Hans Müller	"Max Muster" <fake@fake.com>	6	2	Create	

**Reminder Tickets**

My locked tickets (0) My watched tickets (0) My responsibilities (0) Tickets in My Queues (0) Tickets in My Services (0) All tickets (1)

TICKET#	AGE	TITLE
none		

**Escalated Tickets**

My locked tickets (0) My watched tickets (0) My responsibilities (0) Tickets in My Queues (0) Tickets in My Services (0) All tickets (0)

TICKET#	AGE	TITLE
none		

**New Tickets**

My locked tickets (0) My watched tickets (0) My responsibilities (0) Tickets in My Queues (0) Tickets in My Services (0) All tickets (3)

TICKET#	AGE	TITLE
2016111417000035	1536 d 23 h	Tastatur kaputt
2016111417000026	1537 d 0 h	Wasserhahn im Raum 23A tropft
2016110217000021	1549 d 6 h	Klimaanlage im Raum 12 funktioniert nicht

**Open Tickets / Need to be answered**

My locked tickets (0) My watched tickets (0) My responsibilities (0) Tickets in My Queues (0) Tickets in My Services (0) All tickets (2)

TICKET#	AGE	TITLE
2016112317000018	1526 d 3 h	Gerätewartung
2016110217000012	1549 d 6 h	Drucker im Raum 12 funktioniert nicht

**Assigned Services**

Gerätewartung  
Personal  
Support

**Assigned CIs**

NUMBER	NAME	OWNER	DEPLOYMENT STATE
1722000001	Achilles	"Max Muster" <fake@fake.com>	Production
1722000002	Zeus	"Max Muster" <fake@fake.com>	Expired

**Settings**

Upcoming Events

none

**Further Information**

**Company Status**

Escalated tickets: 0  
Open tickets: 6  
Closed tickets: 2  
All tickets: 9

**Stats**

7 Day Stats

Created Closed

1

0

-1 Sat Sun Mon Tue Wed Thu

**Customer Company Information**

Customer: Muster G.m.b.H  
Street: Musterstraße 1  
Zip: 99999  
City: Musterstadt  
Country: Costa Rica

Figure: Customer Information Center Overview

Information is shown as widgets in the overview. Content in overview and arrangements of elements can be freely adjusted.

Clicking in upper right corner of a widget allows for said widget to be hidden.

Clicking in upper right corner of a widget leads to settings for said widget. You can specify which information is to be shown here:

**New Tickets**

Shown Tickets: 10

Shown Columns:

AVAILABLE COLUMNS

Filter available fields...

Changed

Created

CustomerCompanyName

CustomerName

CustomerUserID

First Response Time

CustomerName

VISIBLE COLUMNS (ORDER BY DRAG & DROP)

1. TicketNumber

2. Age

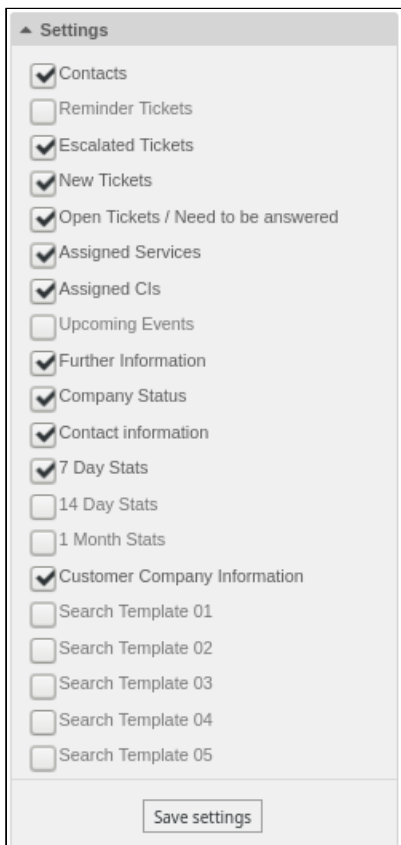
3. Title

or

Figure: Settings for Visible Columns

Using "Settings" widget to the right allows you to adjust information to be displayed to your preferences:

- Mark elements to be displayed .
- Click "Save settings" button.



The screenshot shows a settings panel titled "Settings" with a list of checkboxes. The checked items are: Contacts, Escalated Tickets, New Tickets, Open Tickets / Need to be answered, Assigned Services, Assigned CIs, Further Information, Company Status, Contact information, 7 Day Stats, and Customer Company Information. The unchecked items are: Reminder Tickets, Upcoming Events, 14 Day Stats, 1 Month Stats, Search Template 01, Search Template 02, Search Template 03, Search Template 04, and Search Template 05. A "Save settings" button is located at the bottom of the panel.

Figure: Settings

### 3.7.3 Customer Services

Under the menu item "Customer Services" you can link services with customers and manage the links. When you select the menu item, the overview "Manage customer service assignments" appears. Here you have the following options:

- To link a service to one or more customers.
- To link several services to one customer.

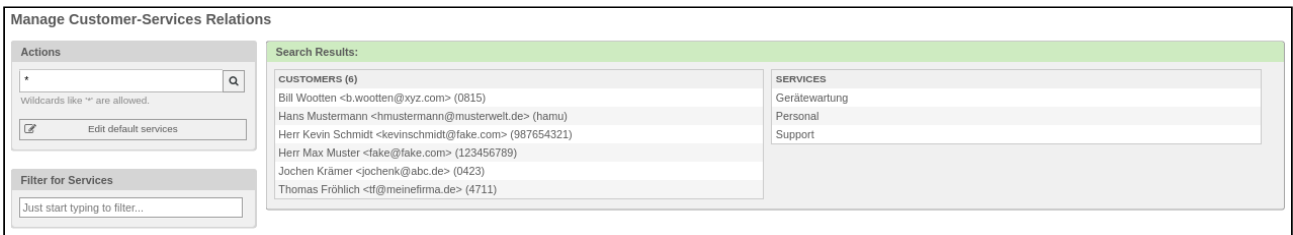


Figure: Customer-Service Relations

#### Linking Customers with Service

- Left-click a service in list.

The widget "Assign customer to service [service name]" appears. (In the example, [Servicename] = "Device maintenance")

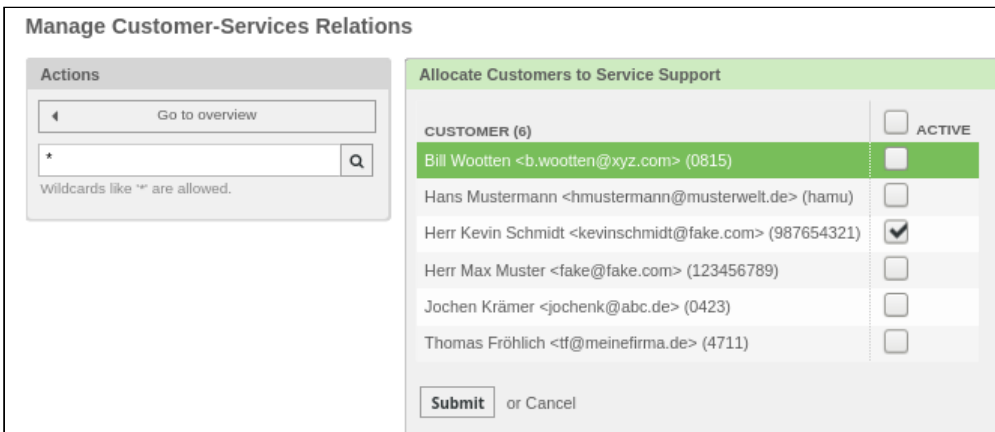


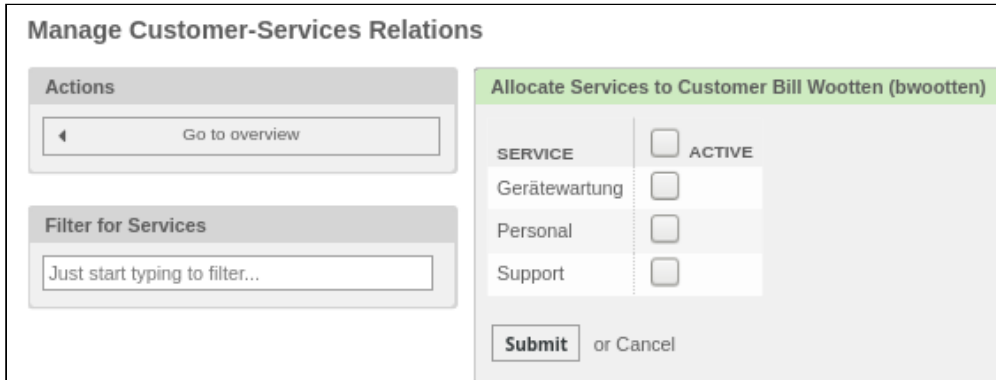
Figure: Allocating Customers to Service

- Mark customers which you wish to link to service .
- Click "Submit" button.



### Linking Services with Customer

- Left-click on a customer in list.
- "Allocate Services to Customer \[customer name\]"\_ widget appears. (In example \[customer name\]= "Bill Wootten")



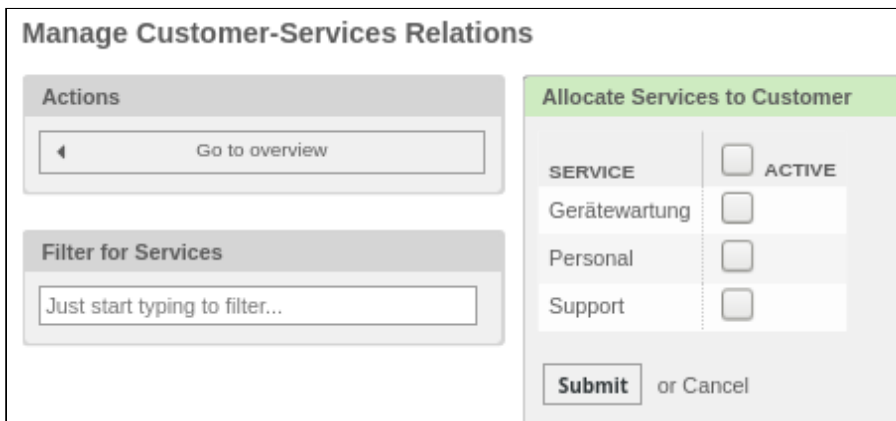
SERVICE	ACTIVE
Gerätewartung	<input type="checkbox"/>
Personal	<input type="checkbox"/>
Support	<input type="checkbox"/>

Figure: Allocating Services to Customer

- Mark services which you wish to link to customer.
- Click "Submit" button.

### Editing Default Services

- Click "Edit default services" button to access "Manage Customer-Service Relations" widget. Here is the option to assign default service to ALL customers.



SERVICE	ACTIVE
Gerätewartung	<input type="checkbox"/>
Personal	<input type="checkbox"/>
Support	<input type="checkbox"/>

Figure: Editing Default Services

- Mark services which you wish to link to customers.
- Click "Submit" button.

### 3.7.4 Customer Administration

With the menu item "Customer Administration" in the "Customer Management" menu, you can manage your customer data, add new customers and search for customers.

If you select the menu item "Customer Administration", an overview opens with any existing customers.

Customer Management							
Actions		List (4 total)					
<input type="text"/> <small>Wildcards like "*" are allowed.</small> <input type="button" value="Add customer"/> <input type="button" value="Database Backend"/>		CUSTOMERID	NAME	COMMENT	VALIDITY	CHANGED	CREATED
		1122334455	Anton Apenswerk GmbH & Co. KG		valid	04/12/2017 11:00	04/12/2017 11:00
		123456789	Muster G.m.b.H		valid	11/01/2016 09:45	11/01/2016 09:45
		123abc	Aurora GmbH		valid	06/27/2018 11:08	06/27/2018 11:08
		28697	Müller & Söhne		valid	03/19/2019 19:07	09/10/2018 10:44

Figure: Customer management overview

#### 3.7.4.1 Add customers

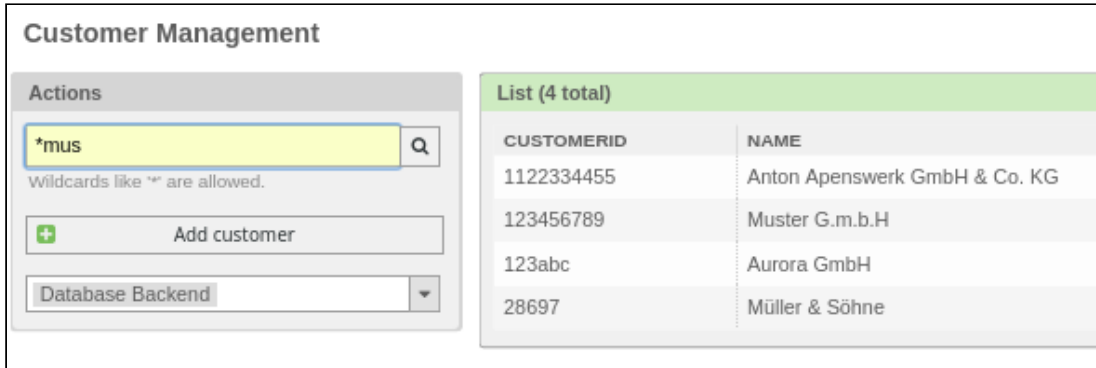
- Click the "Add Customer" button.  
 A widget appears with input fields for customer data.

Customer Management	
<b>Actions</b> <input type="button" value="Go to overview"/>	<b>Add Customer</b> * CustomerID: <input type="text"/> * Customer: <input type="text"/> Street: <input type="text"/> Zip: <input type="text"/> City: <input type="text"/> Country: <input type="text" value=""/> URL: <input type="text"/> Comment: <input type="text"/> * Valid: <input type="text" value="valid"/> <input type="button" value="Submit"/> or <input type="button" value="Cancel"/>

- Enter the data for your customer in the input fields.
- Click the "Submit" button.  
 The customer data is saved and the newly created customer is visible in the overview.

### 3.7.4.2 Search customers

- Enter a search term (company name) in the "Actions" widget.



**Customer Management**

**Actions**

\*mus


Wildcards like \*\* are allowed.

Add customer

Database Backend

**List (4 total)**

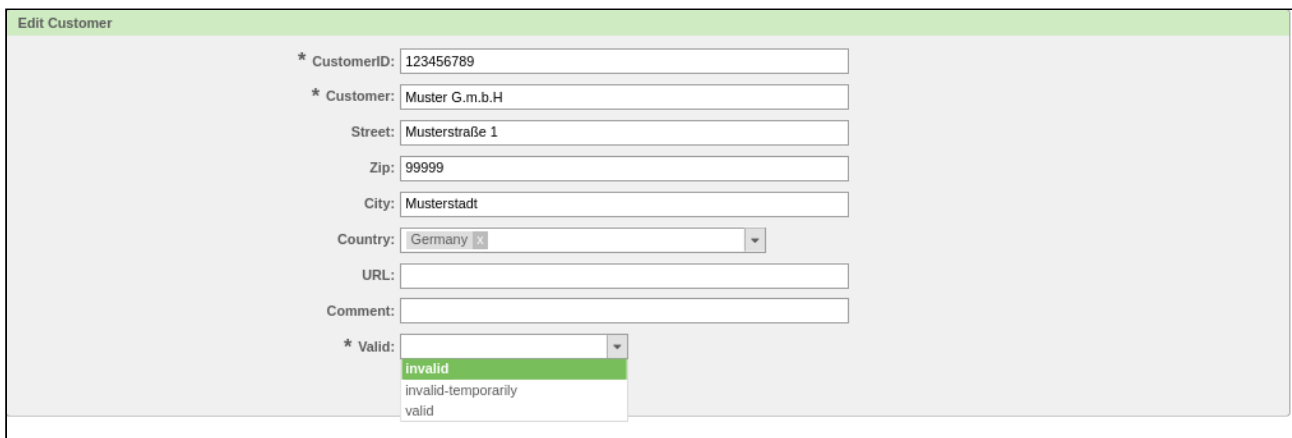
CUSTOMERID	NAME
1122334455	Anton Apenswerk GmbH & Co. KG
123456789	Muster G.m.b.H
123abc	Aurora GmbH
28697	Müller & Söhne

- Click on the  icon.
- The search is carried out and the result is displayed in the list.

### 3.7.4.3 Remove customers

In principle, customers cannot be removed because tickets can be related to the customer. However, it is possible to set a customer to "invalid / invalid-temporary". This means that the customer is no longer available in the selection lists when creating / processing tickets.

- Select the customer in the overview.
- Select a new status in the "\* Valid" field.



**Edit Customer**

\* CustomerID:

\* Customer:

Street:

Zip:

City:

Country:

URL:

Comment:

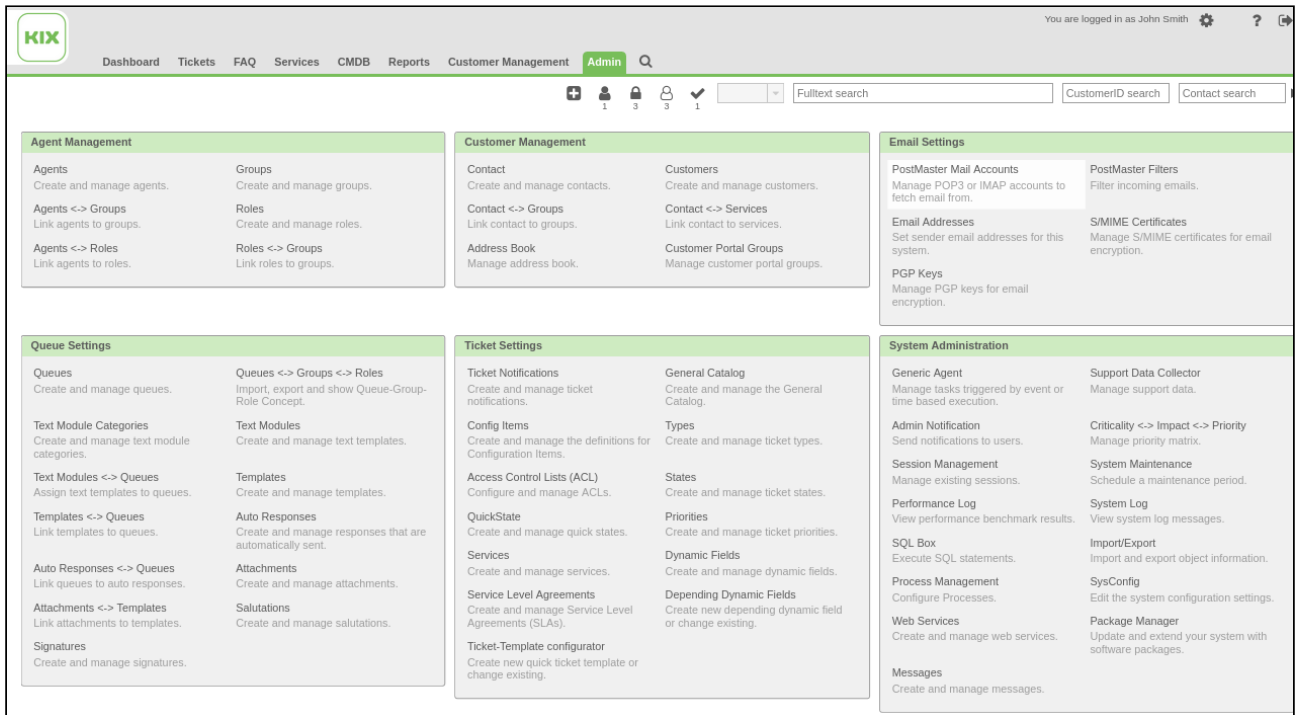
\* Valid:

invalid  
 invalid-temporarily  
 valid

- Click the "Submit" button.
- The customer is set to the new status and grayed out in the list.

## 3.8 Module: Admin

This section provides a brief overview of options for settings in the Admin area.



The screenshot displays the KIX Admin interface with a navigation bar at the top containing 'Dashboard', 'Tickets', 'FAQ', 'Services', 'CMDB', 'Reports', 'Customer Management', and 'Admin'. The 'Admin' section is active, showing a search bar and several notification icons. The main content area is divided into six columns of settings:

- Agent Management:** Agents, Agents <-> Groups, Agents <-> Roles, Groups, Roles, Roles <-> Groups.
- Customer Management:** Contact, Contact <-> Groups, Address Book, Customers, Contact <-> Services, Customer Portal Groups.
- Email Settings:** PostMaster Mail Accounts, Email Addresses, PGP Keys, PostMaster Filters, S/MIME Certificates.
- Queue Settings:** Queues, Text Module Categories, Text Modules <-> Queues, Templates <-> Queues, Auto Responses <-> Queues, Attachments <-> Templates, Signatures, Queues <-> Groups <-> Roles, Text Modules, Templates, Auto Responses, Attachments, Salutations.
- Ticket Settings:** Ticket Notifications, Config Items, Access Control Lists (ACL), QuickState, Services, Service Level Agreements, Ticket-Template configurator, General Catalog, Types, States, Priorities, Dynamic Fields, Depending Dynamic Fields.
- System Administration:** Generic Agent, Admin Notification, Session Management, Performance Log, SQL Box, Process Management, Web Services, Messages, Support Data Collector, Criticality <-> Impact <-> Priority, System Maintenance, System Log, Import/Export, SysConfig, Package Manager.

Figure: Admin Area Overview

For more detailed information, see the KIX Administrator's Manual.

## 3.9 Personal Preferences

In upper right screen area is the XX symbol for calling up the personal preferences page.

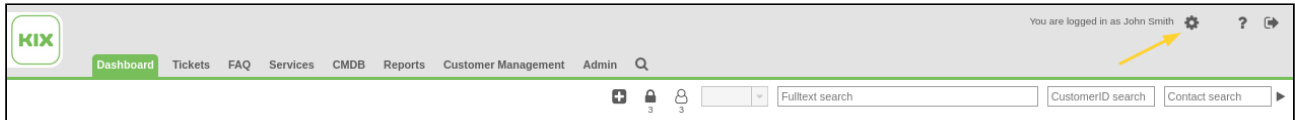


Figure: Menu Bar With "Personal Preferences" Button

### **Change Password**

Change your password here.

### **Language**

You can specify language for KIX interface (German/English) here.

### **"From" field format**

Here you can set how the "From:" field should look like in e-mails (sent from replies and e-mail tickets). This setting is otherwise determined globally in the administration.

### **Select response format**

Determine which reply format should be used in your emails:

- System configuration
- Quote in front of the reply template
- Quote based on the answer template

As long as you do not make your own selection, the 'System configuration' setting is preselected.

### **Queue View - Layout**

You can specify display of queues in "Queue view" here. You can select between:

- Standard,
- DropDown, or
- Queue-Tree.



### **Service View - Layout**

You can specify queues display in "Service view" here. You can select between:

- Standard,
- DropDown, or
- Queue-Tree.

### **Toolbar position**

Here you can define the position of your toolbar.

### **Queue view - show all tickets**

Here you can specify if all tickets (locked and unlocked) or only unlocked tickets are to be shown in "Queue view".

### **Service view - show all tickets**

Here you can specify if all tickets (locked and unlocked) or only unlocked tickets are to be shown in "Service view".

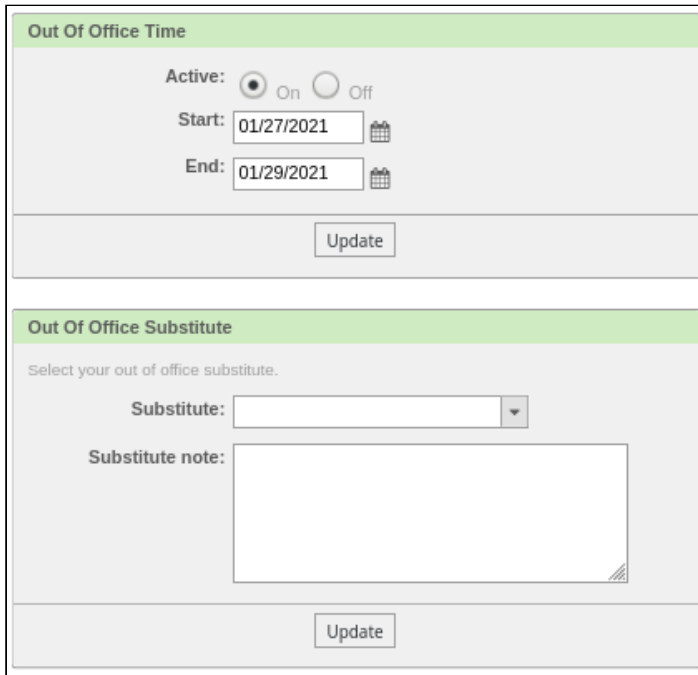
### **Queue selection style**

Use this to determine queue selection behavior.

- "AutoComplete" setting: queue can be described through input of at least two characters. Any queues with this string of characters will be displayed for selection.
- "Standard" setting: queue can be selected via drop-down list.

### **Out Of Office Time**

You can define or switch on or off out of office time here, and specify an agent as out of office substitute. During out of office time, substitute agent receives all ticket notifications for agent they are substituting (depending on which ticket notifications out of office agent has set in their personal preferences)



The image shows two stacked form panels. The top panel, titled "Out Of Office Time", has a green header. It contains an "Active:" section with two radio buttons, "On" (selected) and "Off". Below are "Start:" and "End:" date pickers, both showing "01/27/2021" and "01/29/2021" respectively. An "Update" button is at the bottom. The bottom panel, titled "Out Of Office Substitute", also has a green header. It starts with the instruction "Select your out of office substitute." followed by a "Substitute:" dropdown menu. Below that is a "Substitute note:" text area. An "Update" button is at the bottom.

Figure: Out Of Office Time Settings

First activate your absence time. Then the widget "Out of Office Substitution" opens.

The option "Substitute" allows a specified representative to access the tickets of the agent to be represented. This means that he gets access to the tickets in which the agent to be represented is set as processor and / or responsible.

If the absence time is set to *Active:On* a widget "Currently out of the office" is displayed in the sidebar. This widget can be seen by all other agents registered in KIX, if they have not explicitly deactivated it.

**Linked Config Items**

Specifies number of linked ConfigItems per page.



## 3.9.1 Notification Settings

### **My Queues**

Specify your custom queues here. Ticket notifications for tickets in these queues will be sent to specified agent email address.

These queues are shown in *QueueView: My Queues*.


### **My Services**

Specify your preferred services here. Ticket notifications for tickets which are linked to these services will be sent to specified agent email address.

Selected services will be shown in *Service view: My Services*.

### **Ticket Notifications**

You can specify which changes to the ticket you wish to receive email notifications for here.

Marking  field with XX will open new ticket pop-up in dashboard.





## 3.9.2 Other Settings

### **Skin**

Here you can choose which appearance the surface of your KIX should have: green, blue or dark mode.

### **My Search Profiles**

Here you can select which search templates from other agents you wish to subscribe to or copy.

⚠ When creating search templates, no ":" may be used in the name. This leads to an unwanted behaviour of the system, as a result of which all tickets are displayed on the dashboard when integrated into widgets.

### **My Auto-Subscribe Search Profile Categories**

Here you can specify categories which you automatically want to subscribe to.

### **My Removable Article Flags**

Here you can specify which article flags are to be automatically removed when closing a ticket.

### **Show Merged Tickets in Linked Objects**

Here you can specify if merged tickets in "*Linked Objects*" widget are to be visible or not.

### **Display of Pending Time**

Here you can specify if pending time is to be shown as remaining time or point of time.

### **Use Article Colors**

Here you can specify if article colors are to be used in article overview.

### **Use the browser context menu**

Specify here whether the context menu of the browser should be used in the text editor. If the context menu of the browser is used, its spell check can be used, for example.

### **Overview Refresh Time**

Here you can specify an automatic refresh time for various overview pages.





### **Screen After New Ticket**

Here you can set which view is to be shown after creation of a new ticket.  
You can select between ticket zoom view (TicketZoom) and "Create new ticket" (CreateTicket) view.

### **Screen After Ticket Closure**

Here you can set which view is to be shown after closing a ticket.  
You can select between "Last screen overview" or "Ticket zoom".

### **Ticket Zoom - Article Handling**

Here you can specify which article is to be shown first in ticket zoom view.  
You can select between "Last customer article" / "Last article" / "First article".

### **Configitem Search Behavior for Search over All Config Item Classes**

Here you can specify behavior of CI search when searching over all classes.  
You can select between "Common Attributes" and "All Attributes".

### **Behavior of KIX Sidebar "ContactInfo" Contact Selection**

Here you can specify which contacts are to be shown in "Contact Information" KIX sidebar.

You can select between "Linked Persons" or "Article Contacts".

- If "Linked Persons" is selected, all persons linked with ticket will be shown.
- If "Article Contacts" is selected, all persons linked with an article will be shown.



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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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