KIX Start

KIX 18 User Manual - EN

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1 Introduction

1.1 About KIX 18

Version 18 of KIX is a browser-based open source service management system for IT teams, technical service, maintenance, after-sales services and facility management. As an open source ticket system, KIX offers the right service solution for every company size and requirement, from SMEs to public or state institutions and authorities to large multinational corporations:

KIX Start

Software-based service management
ideal for beginners.

Basic solution
easy to integrate
free of charge & immediately ready for use
for small service organisations

KIX Pro

The comprehensive business package for
professional IT and technical service.

customised & cross-departmental
incl. Self Service Portal and
diverse additional modules
for medium-sized and large companies

KIX Cloud

Our cloud offer (SaaS) for KIX Pro.
Intuitive, flexible, including full managed services

immediate provision
high cost transparency
incl. Self Service Portal
optimal for SMEs

ITIL® 4 Certified

The IT service management system KIX Pro 18 has been awarded SERVIEW Certifiedtool for 15 out of 19 possible **ITIL® 4 practices.** This makes KIX Pro 18 the world's most functionally powerful certified open source tool for the ITSM sector.

In order to make the use of ITIL® 4 as easy as possible for users, **the add-on "ITIL Practices"** was developed. These are templates with which changes can be made, problem cases, services and management tasks can be processed and numerous reports can be produced.

1.1.1 Optional extensions for KIX:

Field Agent App

Mobile app for iOS and Android for
technical service on site
Usable for KIX Start and KIX Pro

Add-on "ITIL Practices"

Add-on for process management and
for the automation of workflows
Usable for KIX Pro

Maintenance Plan

Add-on to support
recurring maintenance tasks
Usable for KIX Pro

1.2 Community

KIX is a dynamically growing software that is subject to a constant further development process. As an open source company, it is important to us, not only. We cordially invite you to become part of our KIX community and to support us with helpful tips for the further development of KIX and user information.

1.3 About this manual

KIX version 18 is a browser-based open source service management system. This manual is aimed at users who will work with the **KIX Start 18** software. It is intended to serve as a reference work in your daily work. Depending on your permissions, you can

- Create and edit tickets
- Create and manage organisations and contacts
- Create and manage assets
- Create and edit FAQs

You also have access to a personal calendar and a personal Kanban Board.

We have created a separate manual for **users** of **KIX Pro 18**. It is a supplement to the KIX Start 18 manual and describes the additional functions contained in the Pro version.

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

In addition, you can find further documentation on KIX Start 17 and KIX Pro 17 at: https://docs.kixdesk.com/.

> ⓘ This edition of the manual refers to release KIX 18.31.

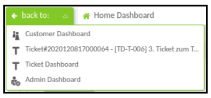
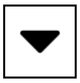
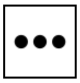
1.4 To comprehension

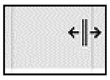
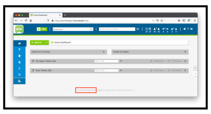
In these instructions, the masculine form according to the grammar is used in a neutral sense. It always appeals to all male, female and diverse readers. Gender variants are not used for reasons of readability and understanding of the text. We ask all readers for their understanding for this simplification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

2 Notes on Working with KIX 18

2.1 Icons, buttons and symbols

The following table contains an overview of frequently reoccurring buttons, icons and symbols, and a brief description of each one.

Icon	Element	Explanation	Application Example
	Green button "Back to"	The "Back to" button contains the history and links to the pages you last called up	Home Dashboard
 	Arrows at end of lines	Buttons that open (down arrow) and close (up arrow) widgets and information areas, e.g.lanes, table lines and drop-down menus.	Tables and widgets on Home Dashboard
	Button with 3 dots	Button for opening other actions.	Ticket overview in ticket module
	Filter symbol	Activates and opens the filter, to be able to search through tables and lists by term.	When searching, in ticket tables
 	Plus and minus buttons	The plus button opens a paragraph in the form, and the minus button closes it again. The plus button adds another field (e.g. for dynamic fields) for saving information.	Creating tickets
	Information button	This button opens a window with additional information.	In the basic information about the ticket, additional information about the organisation and contact
	Question mark button	This button opens a window with a note/ text on assistance.	When creating a new object

Icon	Element	Explanation	Application Example
	Notepad button	This button opens/closes a personal notepad.	In the respective module on the right-hand side of the screen
	Column width symbo	By pressing and dragging the mouse button, you can change the column width in tables.	In tables
	Column header	By clicking the column header, you can sort the tables column by column.	In tables
***	Entry of 3 stars	By entering 3 stars in form fields, the first 10 datasets found will be listed.	Entry of characteristics in Advanced Search
::	Entry of 2 colons	Entering 2 colons colons opens the text modules (agent portal).	Write email from a ticket
	Version / build number	Shows which version of KIX Start / Pro is installed.	KIX 18 (Build: 3635.1401)

2.2 User-specific restrictions

As a user, you are assigned certain access rights within the system by your admin. Depending on this, a user-specific selection of teams, editors, and persons responsible will be available to you on the ticket. This also has an effect on the "Search" and "Filter" functions, in which you are only shown results to which you have access rights.

2.3 Use the URL of the browser

Every open tab (including opened content), every view, every search, etc. has a unique URL, which is displayed in the address bar of the browser. It also contains the ID of the currently open object (contact / organization / ticket, etc.).

You can copy the URL to paste it into other applications or browser windows for further use. You can also save the URL of a search in your favorites.

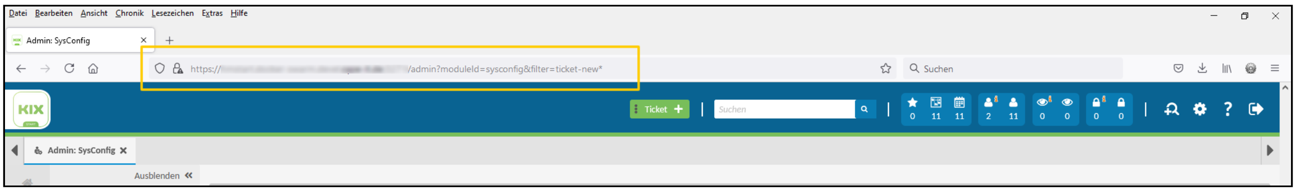


Fig .: The URL in the browser

2.4 Mobile View

The appearance of KIX depends on the screen size. On smaller screens, the content area takes up the entire width of the screen and the menu and header lines are minimized:

Button		Description
	hamburger button	Displays the module menu. Shows the open tabs below the module menu.
	left double arrow	Opens the left sidebar with the Explorer.
	dropdown button	Opens the toolbar for quick access.
	new button	Opens the dialog for creating new objects.
	right double arrow	Opens the right sidebar with widgets (frontend only).

2.5 General Function Descriptions

This section provides descriptions for frequently reoccurring functions. These are applicable when accessing the various dashboards and when creating and editing tickets, contact information and assets.

Here you will find an overview of the following:

2.5.1 Attachments

If you add an attachment in a create or edit dialog, depending on the amount of data, it may take a while before the process is completed when saving. For the duration of the saving process, the loading spinner is displayed, which can also be canceled if necessary.

If the process is successfully completed, the success message is displayed. A corresponding message appears in the event of an error. After creation, there is no automatic forwarding to the detail pages.

> **Note**
>
> The system does **not** time out. However, the processes continue to run in the background and can block the browser accordingly with large amounts of data.

Attachments to tickets, assets and FAQs in PDF form can be opened in a new browser tab by clicking on them. They don't have to be downloaded separately. Attachments in the formats jpg, png, gif, bmp can also be opened directly in a gallery view without downloading.

2.5.2 Article list

In order to make it easier to record information and the content of the article data in general, the article list is given a structured appearance with colored highlights and avatars.

In the header of the communication history (Figure 1) you can find

- a search
- the possibility to filter on messages...

Filter	Explanation
...with Attachments	Checking the box will only show articles with attachments.
...from external	By ticking the box, all articles that have been sent to the ticket externally will be displayed.
Visible	Checking the box displays all items visible to the customer (Self Service Portal, outgoing messages/notes marked accordingly)
Unread	By ticking the box, all articles that have not yet been read will be displayed.
Mark all as read	Clicking the button will mark all messages as read. The button is only active if there is at least one unread article.

The communication history uses the income time for the chronological classification of posts.

Avatars indicate which sender the message came from:

- Display sender avatar on the right → Message comes from the system or from an agent
- Display sender avatar on the left → message comes from external (self service portal, email)

You can mark article content like "Subject", "To", "Cc" and "Bcc" with your mouse to copy the content.

Your admin has the option to set channel-dependent colors (see figure 2). This means that depending on the communication channel (note, email) the article gets a different color.

The initial focus is always on the latest article, which is displayed as an expanded item. You can also set the order of items in your personal preferences.

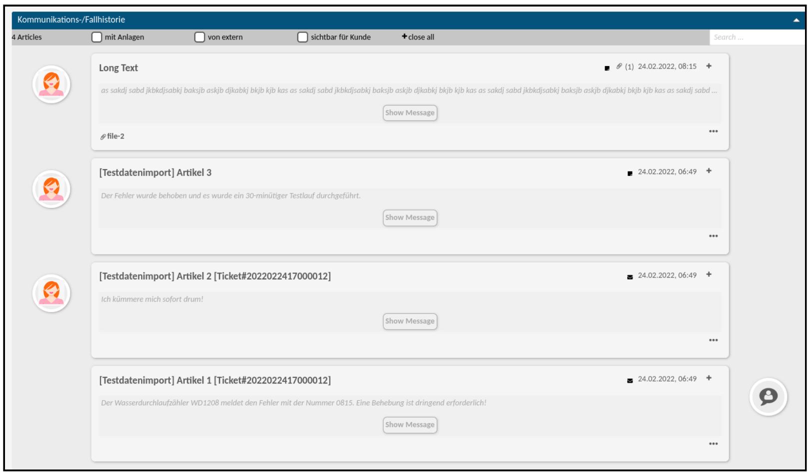


Figure 1

Figure 2

2.5.3 CK Editor

KIX uses the CKEditor to enter formatted text, e.g. in tickets or articles. This works in the same way as the usual writing programmes. If you move the mouse over the respective button, a keyword for its function is displayed.

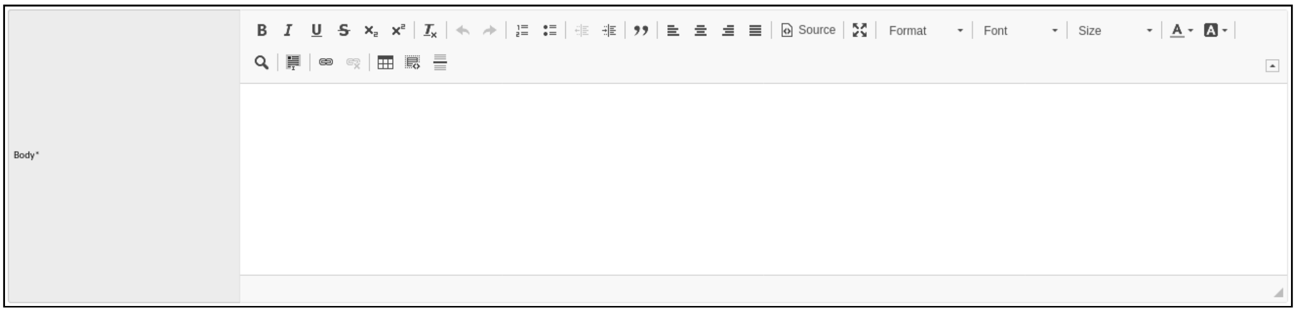
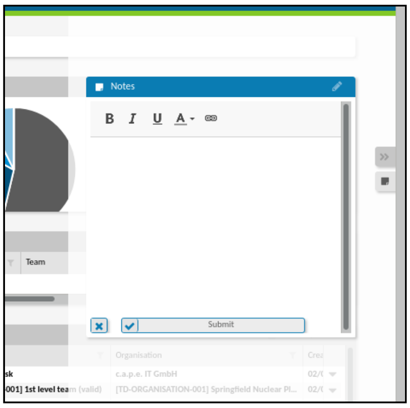


Fig.: CK Editor here in the form "New Ticket"

The CKEditor is delivered with a compact range of functions and can be adapted by your administrator if necessary.

2.5.4 Digital Notepad



Your digital notepad is located on the right-hand side of the Home Dashboard, which is instead of having analog-style post-it notes on your screen. This is where you can make notes, and write memos and work instructions. The notepad is only visible to you.

It can be collapsed if need be by clicking the symbol.

To add notes, click the pencil icon in the top right-hand corner. A new editing box will open. Enter your note. Some of the well-known editing features from other writing tools are also available: writing in bold or italics, underlining, changing font color, and inserting links. Once you have finished writing your note, click "Submit".

If you want to delete the note, open the box again using the pencil icon and delete the text. Then click "Submit" and the notepad will be empty again.

2.5.5 Dynamic fields

A dynamic field is an additional field within a form or a screen for the purpose of supplementing the information and content saved within the form or screen. This field can be tailored to your specific requirements. The following field types are available for this:

Field Type	Application Example
One-line text field	Within a fleet park management context, you would like to create a ticket for a specific vehicle For unique identification purposes, you require a field in which you can enter the identifier.
Multi-line text field	In the organisation information area, you would like to leave a specific comment. Example: Information for field agent concerning the fact that the organisation has several dogs, which run loose within the grounds.

Field Type	Application Example
Selection menu (drop-down) Single/multiple selection fields	Single selection: An incident notification goes to a specific machine. The incident log contains an error code, which you would like to record in the system in order to work more efficiently. For this there is an extra field, within which you can search for the corresponding error code from a drop-down menu, which you can then save with a click. Multiselect: To carry out a maintenance task, the employee responsible must take certain equipment with them. You would like this to be a general reminder that is linked to the ticket. From a drop-down list, you select the corresponding terms and in this way save the information directly with the process.
Date	The work process is to be started on a specific date.
Date and Time	You want to assign a deadline to a work process.
Checklist	Checklists allow you to include a list of predefined tasks in the ticket. Such a list can be used by service technicians as a guideline for full service provision and thus for compliance with quality standards. The service technician can work through the checklist point by point, answer it and, if necessary, write down a comment on individual points. How far a checklist has been processed can be seen from a progress bar in both the ticket masks and the dashboard.
Affected Asset	You can use this field to link one or more assets (maximum 15) to a ticket or to an FAQ article. Link e. g. an asset directly with the corresponding purchase and guarantee contract and its instructions for use, which are stored in an FAQ.
Table	When placing an order, you would like to save values in a table on the ticket.

Field Type	Application Example
Ticket Reference (**KIX Pro**)	When creating a new ticket, e.g. "Procurement of a new display", you can refer directly to one or more tickets that describe or supplement the facts, e.g. incident ticket "Display does not work".
Organisation Reference **(KIX Pro)**	OrganisationReference dynamic fields create selection fields for selecting one or more organisations.
Contact Reference **(KIX Pro)**	Dynamic fields of the "ContactReference" type create selection fields for selecting a contact or multiple contacts. Depending on the configuration, the selection of contacts can be limited to selected organisations and specific user groups (agents, customers).

Please note

Dates are internationalized in the system, which means that the date format adapts to the language that is set. This is not possible for field forms in which a date is to be entered. These are based on the language that is set in the browser. If this interferes with your workflow, change the language settings in the browser.

Dynamic fields are used for tickets, articles, placeholders and jobs.

Tip

Dynamic fields of the type "Asset Reference": if you want quick access to the details in the asset without having to switch to zoom view first, click the icon. This opens a separate window with the header data for the current asset version.

2.5.6 Exporting via CSV

In the dashboards, there is the option of exporting data records as a CSV file and then opening or downloading them. CSV files are text files in which the individual values generally are separated from each other by semicolons (CSV: Comma Separated Value; file extension: .csv).

Due to their simple structure, CSV files can be easily read into other systems or opened with spreadsheet programs such as MS Excel. The CSV export is useful, for example, to

- editing or supplementing contact or organizational data manually in order to then import it again as a mass update
- save data records locally as a backup
- use the CSV file as a template for the data import

- etc.

For the CSV export, proceed as follows:

- To do this, select the data records to be exported in the table by ticking them.
- After clicking on the "CSV Export" button, the download dialog of your browser starts. The icon is only active if at least one data record is selected.
- The file name is: "Export_" + <object class> + "_" + <timestamp> + ".csv" (e.g. "Export_Ticket_2022-01-28T1423.csv").
- The file contains the data records selected for export 1 as well as the column headings of the source table 2

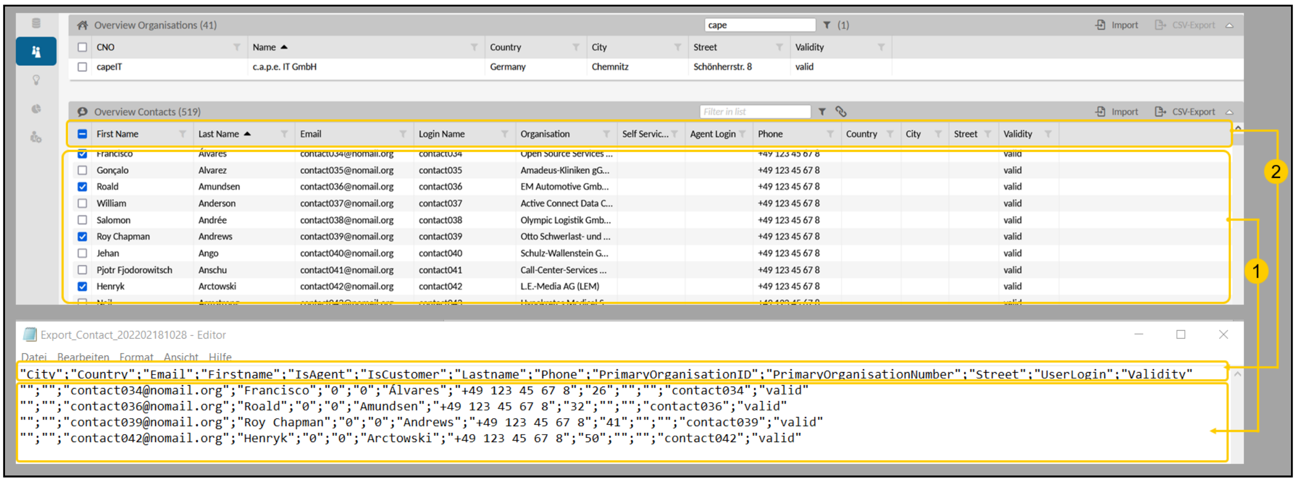


Fig.: CSV export of selected contact data

Tip: Export all data records and save them as a local backup in your file directory before performing a CSV import (e.g. for a mass update). That way, you always have a collection of records ready to import back in case of an emergency.

2.5.7 Importing

The dashboards have the function of importing data or data sets. You can use this, for example, to carry out mass updates or to transfer data from a KIX test environment to a productive KIX.

To do this, click on the import button . The import dialog opens in a new tab:

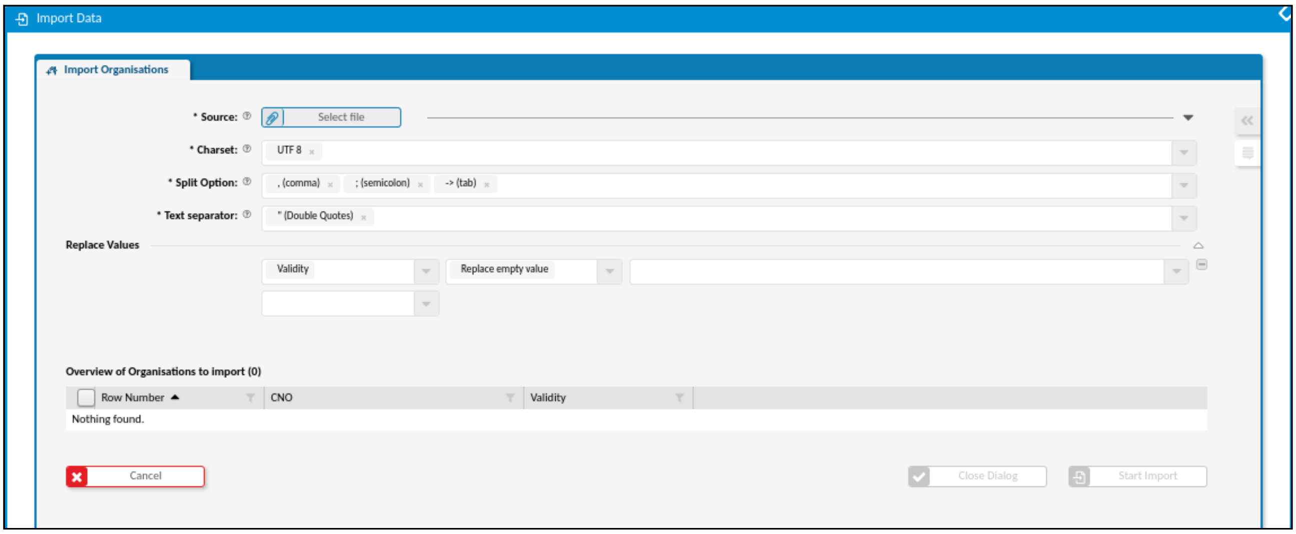


Fig. Import dialog for contacts

When importing data, several data or data records are entered into the KIX database at the same time. You can define in the import options how to proceed with existing data.

Only CSV files can be imported. CSV files are text files in which the individual values i. i.e. R. are separated from each other by semicolons (CSV: Comma Separated Value; file extension: .csv).

Import Conditions

The CSV file to be imported must meet a number of conditions. Otherwise the import fails.

- The data structures of source (CSV file) and target (KIX) must match exactly.
- In the CSV source file, the first line must contain the internal object attributes (column headings).
  Tip: Export a few records first. This gives you a proper (valid) CSV file that you can fill with values and whose values you can change.
- At least all mandatory attributes must be filled (except validity). Mandatory attributes are all mandatory fields that are required when creating an object (e.g. contact, organization) (marked with *).
  The validity can be set automatically by the import mechanism (see Replace value)
  Info: The term "attribute" used below is roughly equivalent to the column headings.
- All text and attribute values must be set in single or double inverted commas.
- Multiple attributes must be separated by a semicolon ";" to be separated.
- Date fields expect the format: `yyyy-mm-dd` resp. `yyyy-mm-dd hh:mm:ss`.

Proceed as follows to import:

- Make sure that a proper (valid) CSV file exists in your file system.
  If you use a spreadsheet program to edit the data records (e.g. MS Excel), first save the file in CSV format.
  Make sure that inverted commas and date formats are preserved. To check, you can open the file in a text editor.
- Make sure that the above Import conditions are met.
- Click on the "Import" button and select the CSV file to be imported in the import dialog that opens.
- Check the correctness of the data records to be imported in the "Overview of contacts to be imported"!
  - If necessary, deactivate the tick in the first column if you want to exclude individual objects (contacts/organizations) from the import.
  - Pay attention to the correct representation of umlauts, change the character set if necessary.
- If necessary, change the import options and determine how to proceed with existing or non-existent data (see table below).
- Click on "Start import" to start the import. The imported data is then available in KIX.

⚠ **Important:** Once an import has started, it can neither be stopped nor undone. Therefore, check the data records to be imported carefully in advance (content and presentation)!
It is advisable to save all data records locally via CSV export beforehand. In the event of an emergency, a local backup is available that can be imported back.
Depending on the volume of data, the import may take a moment. It is therefore advisable to split large amounts of data into several small imports.

Import options:

Line title	What needs to be done?
Source	Select and upload a CSV file containing the datasets to be imported. Drag & drop is possible. Drag the CSV file onto the "Choose file" button. **Attention**: Only one file can be uploaded at a time. If a file is already selected and you click the button again, the file already selected will be discarded.

Line title	What needs to be done?
Charset	Specify the character set used in the CSV file. Default is UTF8. In the overview of the contacts to be imported, check that the letters and characters are displayed correctly, especially umlauts. If necessary, change the character set if the display is incorrect. • UTF 8 • ISO 8859-1 • ISO 8859-14 • ISO 8859-15
Split Option	Specify the delimiter(s) used to separate each attribute value in the CSV file (multiple choices allowed): • , (comma) • ; (semicolon) • : (colon) • . (dot) • -> (tab) You can also select all by placing check marks in  .
Text separator	Double inverted commas (" ") or single inverted commas (' ') are used to mark the beginning and end of an attribute value. Specify which variant is used in the CSV file.

<table>
<tr><th>Line title</th><th>What needs to be done?</th></tr>
<tr><td>Replace Values</td><td>Optionally specify which values should be automatically set or replaced during the import.

If the data records do not contain any validity, the validity can be set automatically for all imported data records.
Replace blank value: This pads blank values of an attribute with the specified values.
The attribute to be set must be contained in the CSV and must not be a mandatory field (exception: validity).
Example: If the CSV contains the attribute "City", this does not have to be filled with values. The city can be set here for all imported contacts.
Enforce: This sets the specified value for all imported records, overwriting existing values.
Example: Sets the validity to "valid" for all imported contacts, even if they were previously created in the system with "(temporarily) invalid".
Ignore: Existing data is ignored and not replaced.
Use this option if the CSV file contains attribute values that should not be replaced, e.g. Agent Login.</td></tr>
</table>

2.5.8 Keyboard navigation

Below you will find an overview of the keyboard commands and shortcuts that you can use in KIX:

Key/shortcut	**Function**
[Esc]	Closes the dialog or selection area without saving (the same as "Cancel"). The focus moves off the field when doing so.
[Enter]	Selects the value that is currently highlighted; confirms and closes the field. In single selection fields: Switches to the next field.
[Space]	In single selection fields: Selects the entry and closes the field. In multiple selection fields: Selects or deselects the value that is in the focus, leaves the field open.
[Tab]	In single selection fields: Selects the entry, closes the field, and switches to the next field. In multiple selection fields: Switches to the next functional element (field or button); sets the focus in the list filter.
[Shift]+[Tab]	Jumps to the previous field
[Shift]+[Navigation]	Highlights all values that are in the focus
[Ctrl]	Shifts the focus of the keyboard control to the dialog
[Ctrl]+[Tab]	Switches between tabs in the dialog (if applicable)
[Ctrl]+[Enter]	Save/start search
[Ctrl]+[right arrow key]	Next page
[Ctrl]+[left arrow key]	Previous page
[End]	Jumps to the last value in the selection field

Key/shortcut	Function
[Home]	Jumps to the first value in the selection field
[Page Up] or [PGUP]	Jumps up 10 values in the selection field
[Page Down] or [PGDN]	Jumps down 10 values in the selection field

Notes:

- The keyboard control only works if the focus is also in the dialog / form or in the element concerned. If the focus is elsewhere, the control does not react either.
- To edit a form with several pages, the navigation changes as follows:
    - [Ctrl] + [left arrow key] - jumps to the beginning of the word
    - [Ctrl] + [right arrow key] - jumps to the end of the word
    - With [Ctrl] + [arrow key left] and [Ctrl] + [arrow key right] you can NOT change the page of the form.

2.5.9 Linking

As the owner, you would like to create links between new objects and/or delete existing links. This function is available in the ticket, asset, organisation, contact and FAQ zoom view under the "Links" button.

As a general rule, the following types of links are possible:

Source / Target	FAQ	Ticket	Asset
FAQ	Normal Parent Child	Normal Parent (inactive) Child (inactive)	Normal Relevant to
Ticket	Normal Parent (inactive) Child (inactive)	Normal Parent Child	Normal Depends on Required for Relevant to

Source / Target	FAQ	Ticket	Asset
Asset	Normal Relevant to	Normal Depends on Required for Relevant to	Alternative to Depends on Required for Relevant to Linked with Part of Contains

If FAQs are linked to tickets, the "Parent-child" link type is not available. This is for the sake of clarity and better data maintenance. If required, your admin can set the key to active so that the link type can be used.

Further linking types can be created by the administrator. If you have any questions, contact your administrator or our support.[1]

Technical notes on link types

Basically, a distinction can be made between source and target in the case of links. This is irrelevant for so-called undirected link types, because they work the same in both directions. This applies in KIX for:

- Normal (normal)
- Relevant for (RelevantTo)
- Alternative to (AlternativeTo)
- Connected to (ConnectedTo)

The source is the starting object at which the "Link" action starts and the target is the object that was selected for linking. The so-called directed link types determine who is the source and who is the target based on their own logic.

These occur in pairs, that is, if ticket # 1 is opened, and a ticket # 2 is linked to the type "child" and then ticket # 2 is opened, ticket # 1 is linked there as "parent". In the backend, ticket # 1 is saved as the source & ticket # 2 as the destination. According to this logic, the following pairs work:

- Child → Parent Link in the backend: ParentChild
- Depends on (DependsOn) → Required for (RequiredFor) Link in the backend: DependsOn
- Part of (PartOf) → Contains (Includes) link in the backend: PartOf

Tickets can be linked to:

- Tickets
- Assets

1 https://forum.kixdesk.com/

- FAQ

A ticket can be assigned:

- Contact
- Customer
- Agents as processors and responsible persons

Assets can be linked to:

- Tickets
- Other Assets
- FAQ

The following can be assigned to an asset (if the class definition offers these attributes):

- Contacts
  Agents
  Customers

FAQ can be linked to:

- Tickets
- Assets
- Other FAQ

Customers can be deposited at the following objects:

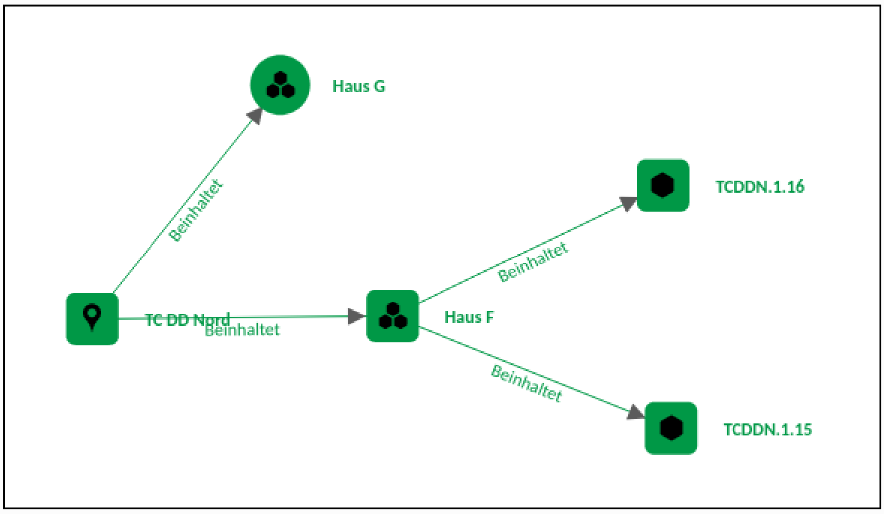
- Tickets
- Assets
- Contacts

Contacts can be stored on the following objects:

- Tickets
- Assets
- Customers

Example

In this selected link graph, the structure as well as the type of link can be seen.



The "TC DD Nord" location includes the "Haus F" location. This in turn contains the room "TCDDN 1.16".

2.5.10 Placeholder

KIX placeholders are variables for ticket- and item-related values such as the agent or the contact on the ticket. Since this information can be different for each ticket, placeholders are used, for example, to keep the salutation in the reply dynamic. However, the values of dynamic fields can also be accessed by means of KIX placeholders in order to use them in the desired place.

KIX placeholders are basically integrated by the admin at the appropriate place and replaced by the real contents in the agent or customer portal when a function is called (e.g. execution of a job, use of a text module).

So that no unwanted information gets out (keyword data protection), placeholders entered by the agent in text fields are not resolved when saving. This affects the following areas:

- Ticket creation
- Ticket editing
- Article creation
- Reply/forward article
- other actions with text fields (title, subject, article text, dynamic fields, ...)

2.5.11 Printing

Content from KIX can be printed in the following ways:

- Dashboards can be printed using the key combination "Ctrl+P".
- In zoom views, the "print" action is in the widget header, which automatically takes you to the browser print screen.
    - **Exception:** Tickets and individual articles within a ticket can be printed as a PDF including graphic elements. (see ticket zoom view)

2.5.12 Search

If you start a general search with "***" (dashboard, dynamic field, etc.), you will only be shown a maximum of 10 entries. This prevents the search from taking a long time, especially when there is a large amount of stored data.

The ticket result list of the search can be limited or sorted by filters. Sorting affects all results in the list, not just the first 10 shown.

Sorting by ...	Display
Creation date (modification date, dynamic field type "date/time", ...)	The most recent/oldest of all tickets is displayed first/last.
Priority	The highest/lowest priority of all tickets is displayed first/last.
Type	Tickets with the alphabetically first/last ticket type will be displayed first/last.
Status	Ticket with the alphabetically first/last status name is displayed first/last.
Team (Queue)	Ticket with the alphabetically first/last team name (queue name) is displayed first/last.
Dynamic field type "Selection"	Ticket with the alphabetically first/last selection value is displayed first/last.

Sorting by ...	Display
Dynamic field type "Organisation"	Ticket with the alphabetically first/last organisation name will be displayed first/last.
Dynamic field type "Contact"	Ticket with the alphabetically first/last contact last name followed by the first name will be displayed first/last.

2.5.13 Sidebars

Sidebars are located on the right-hand side of your screen and can contain several widgets. They contain further details about tickets, such as:

- Customer information
- Contact information
- Allocated assets
- FAQ suggestions
- Similar tickets
- SLA information
- Help sidebar for text modules

The individual widgets in the sidebar can contain the following elements:

- Contact information, including a photo of the contact person or customer
- Links to:
    - Contact address
    - External URLs (e.g. to external websites, to content in a web CMS)
    - Email address and telephone number, to open them in an external program
- Quick click-based access to internal links (e.g. create new asset, switch to contact, display of which tickets are open at the organisation/contact etc.)

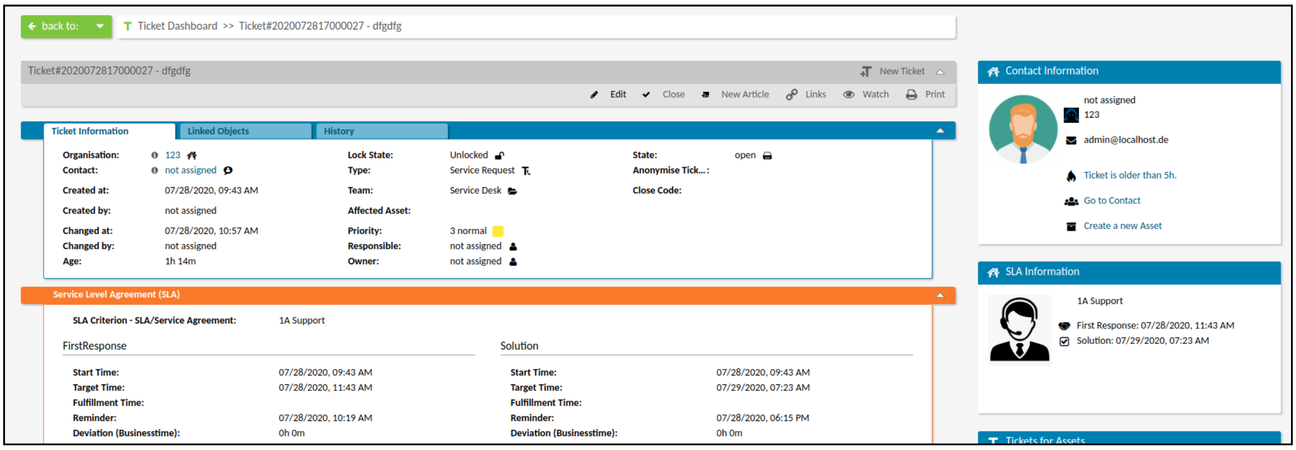
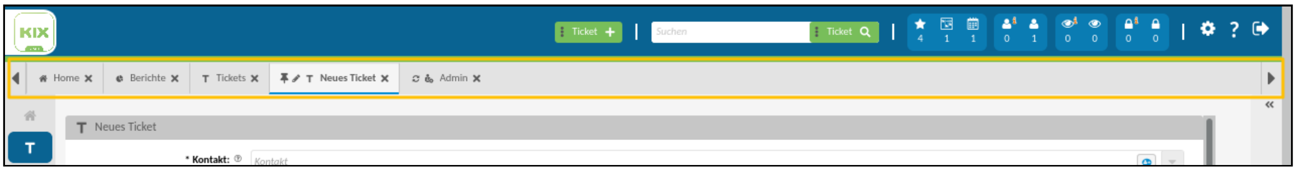


Fig.: Example for Sidebar in Ticket Dashboard

2.5.14 Tab bar

As a user of the agent portal, you want to be able to switch between dashboards and object detail pages quickly and easily and edit them. This is possible via the tab bar.

It is located in the upper content area below the header.



- The tab contains the name of the object or the context (e.g. new ticket). By clicking on a tab, the application focuses on it.
- The tab bar can be scrolled left and right. If a tab is not in the visible area and is activated, it scrolls automatically into the visible area.
- Double-click on a tab to fix it (this is made visible by the pin icon). Tabs pinned in this way are released by repeated double-clicking.
- Pinned tabs are saved. If the application is now opened in another browser or on another computer, the pinned tabs are immediately available again.
- Tabs can be moved using drag and drop. If a pinned tab is moved, the new order is saved.
- If data changes on a page, it is visualized on the tab with the reload icon .
- To close the tab, click on "X" in the tab or click on the tab with the middle mouse button. When the last tab is closed, the home dashboard opens.

2.5.15 Tables

You will find tables in the individual dashboards and in the complex search. These contain clear information on the objects created in KIX (tickets, assets, contacts, organisations, FAQs, etc.) or the results list of a search.

The tables can be filtered and sorted by column to quickly find the desired data. The data records displayed in the tables are limited. You can load additional data records using the "load more" button.

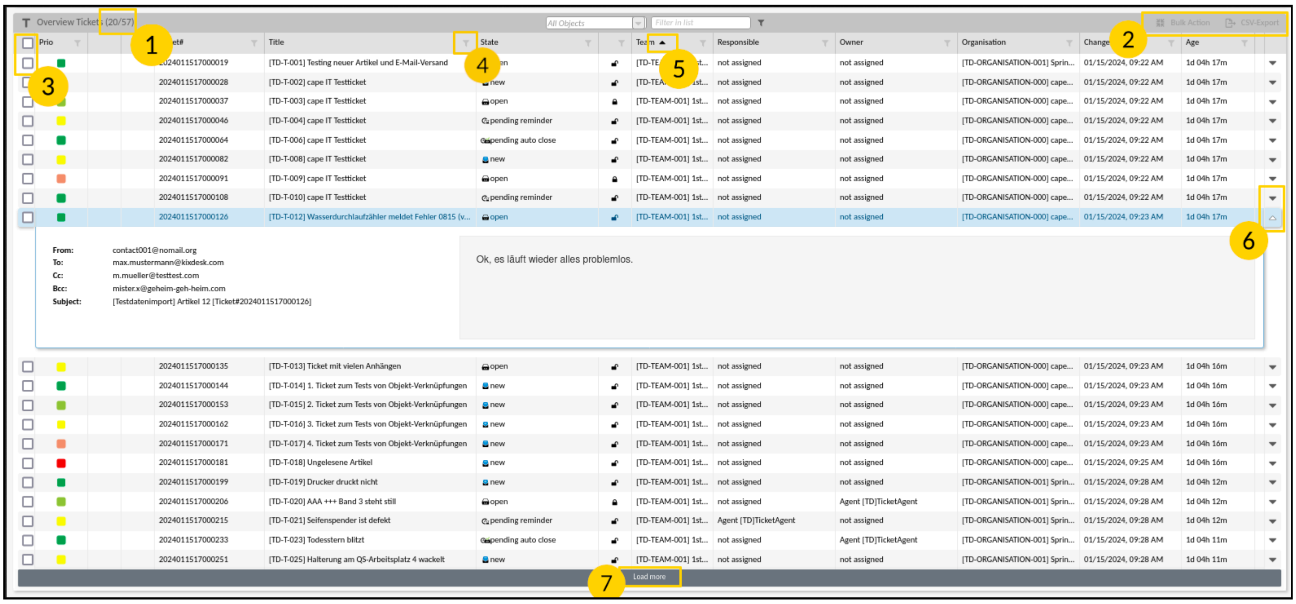


Fig.: Example of a table based on the ticket dashboard overview

	Function	Description
1	Overview Quantity	Number of entries in the table. The first number stands for unread/new entries. The second number indicates the total number of entries in this table.
2	Actions	Depending on the context of the table, various actions are available to you at this point. The action becomes active as soon as at least one object in the table has been selected or ticked.
3	Selection of the object	Tick the box by clicking on the square. This allows you to select the respective object. By clicking on the grey square in the top line, you automatically select all objects in the table.

	Function	Description
4	Filter (in each column)	Here you have the option of searching the respective column for a search term. Click on the filter symbol and enter your term. Finally, press "Enter".
5	/ Sort (in each column)	Click on the black triangle in the column header to sort the table according to the selected column.
6	/ Open/Close	Click on the black triangle to open the selected entry. Click on the white triangle to close it again. In some tables, you will find the white triangle in the header area of the table. Click on it to close the entire table.
7	"load more" Button	By clicking on the button, further objects (tickets/assets/organisations/contacts/FAQ) are displayed. If you click on the "load more" button, a filter set in the table is reset. You must enter this again.

2.5.16 Use of selection fields

At least 3 characters must be entered in order to display results in selection fields (e.g. search for affected assets, search for related tickets, select organization). You can use the asterisk (*) as a placeholder for unknown parts of the text. Possible combinations are, for example:

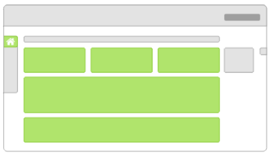
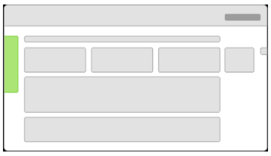
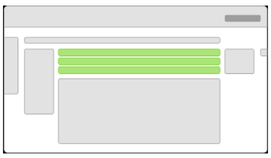
mu*	Looks for everything that begins with "mu" Finds, for example: Mustermann, Muskau, Mueller
*mund	Look for everything that ends in "mouth" Finds e.g. Max Wasmund
mu	Finds everything that contains "mu" Finds, for example: Max Mustermann, Hartmut Werler

m**	Finds everything that begins with "M" (2 stars, because 3 characters are expected) Finds e.g. Michael, Max Mustermann, Mannheim
ma*mu*n	Finds everything that begins with "ma" and contains "mu" and ends with "n". Finds, for example: Max Mustermann, Martin Hartmutson.
20*	Searches for everything that begins with "20" (see also must *) Finds e.g. 20001, 20100, 20abc300
20	Finds everything that contains "20" (see also * mu *) Finds e.g. 4720001, ABC-20100, ticket # 20abc300
2**	Finds everything that begins with "2" (2 stars, because 3 characters are expected) Finds e.g. 20001, 20100, 20abc300
***	Finds all available entries. This can take a moment.

2.6 Elements of programme interface

The programme interface contains various, partly configurable, elements such as

- Sidebars
- Widgets
- Lanes
- Detailed views
- etc.

	**Personal Home Dashboard** On the personal home dashboard, agents can find a quick overview of all events.
	**Module menu** All available modules (e.g. tickets, assets, FAQ) can be easily accessed from any page via the module menu with just one click.
	**Explorer** On dashboards, the explorer in the left sidebar helps you to keep an overview. This has the familiar tree structure and guarantees easy navigation even in extensive structures.
	**Tables** Clear tables, which you can sort and filter according to your needs, help you optimally with your daily work processes.
	**Lanes** On the detail pages of the individual objects (e.g. ticket, asset) you will find a lot of information, which is neatly arranged in several lanes to save space.

	**Sidebars** Various additional information (e.g. contact details) are discreetly located in the right sidebar, which you can easily show and hide. Various additional information (e.g. contact details) are discreetly located in the right sidebar, which you can easily show and hide.

2.7 Glossary

Term	Explanation	Usage
Action	KIX distinguishes between ticket actions and item actions. Ticket actions are displayed in the ticket detail view as buttons in the action line and are available in the agent portal and/or the self-service portal, depending on the configuration. Article actions are available as a lateral label on the right side margin of an article, depending on the user's authorisation.	E.g. in the ticket
Add-on	Independent software component which, once installed, extends the scope of KIX. Add-ons are not included in the scope of delivery as standard.	E. g. Add-on "ITIL Practices"
Admin	Person with advanced user rights who manages the system, assigns user rights, and enforces usage guidelines	Separate module within KIX
Agent	A user of the agent portal, e.g. a service employee or an employee who processes an inquiry.	E.g. when creating a ticket
Article	Describes a work step within a process/ticket. Is a documented communication or comment generated by an agent or received from a user.	In the ticket
Assets	Any operating resource that has a function within the business processes, e.g. computers, software, servers, telephones, machines, vehicles, rooms, buildings, and contracts. Assets can also be referred to as: configuration item, config item, and CI.	In the Assets module
Attribute	Property or characteristic that can be assigned to an object (e.g. asset).	In the Advanced Search, in the class definition of assets

Term	Explanation	Usage
Channel	Determines the method of communication (e.g. e mail, note, etc.)	E.g. in the ticket
CMDB	The Configuration Management Database is referred to as the Asset Database in KIX. It was developed for access to and management of assets.	In the Assets module
Configuration Item, Config Item, CI	Any operating resource that has a function within the business processes, e.g. computers, software, servers, telephones, machines, vehicles, rooms or buildings, and contracts. Configuration items are also referred to assets.	In the Assets module
Contact	A contact person within the customer's organization. The contact is allocated to a ticket as the contact person.	E.g. when creating a ticket
Customer	An organization/your customer.	E.g. in the Customer Dashboard
Dialog	Separate window (overlay) with form fields or additional information.	E.g. send email from within ticket, Form dialogs in Admin module
Drag & Drop	Computer function enabling you to click/select graphical elements (e.g. icons, passages in a text, etc.), and drag them across the screen with the mouse, and drop them somewhere else.	
Failure Time	Represents the period of time during which an asset or service is not available during the agreed service time.	

Term	Explanation	Usage
FAQ	Knowledge database for compiling information: • Particularly frequently asked questions • Treatment of frequently occurring problems • Manuals, product data sheets, documentation etc.	Separate menu item on the Home Dashboard
Field Agent App	Mobile application for fitters, service technicians, etc. Tickets can be processed by the technician on site.	
First Response Time	If a service fails within a company, an agent must respond to this failure within a specified period of time. The time begins with the notification of the incident and ends with first contact with the customer.	In the ticket
Icon	Symbol, graphical illustration of an element or menu item.	E.g. menu bar on the Home Dashboard
Impact	Describes the extent of the consequences that an incident or problem has on a work process.	
Incident	Describes an incident or other issue relating to an IT service or asset.	E. g.in the ticket
ITIL	IT Infrastructure Library. Collection of "best practice" for the delivery of (IT) services. KIX is increasingly looking at the agile process models of ITILv4.	Add-on "ITIL Practices"
Lane	Blocks of information dealing with similar topics in the zoom view; can be expanded and collapsed.	Contain aspects such as master data information, version details, assignments, permissions, etc.

Term	Explanation	Usage
Object	Technical designation for items saved in the system such as tickets, assets, etc. and for technical system components e.g. dynamic fields.	E.g. in the Admin module
Organisation	Brings together all data for a company and can be allocated to individual contacts.	In the Customer module
Overlay	Separate window (dialog) with form fields or additional information.	E.g. send email from within ticket, form dialogs in Admin module
Owner	Person who owns the ticket and/or is actively processing it.	In the ticket
Pattern	Basic character string used for translation purposes.	In the Admin module
Permission	Permissions define which work steps and actions an agent may execute, and which objects and information a user may view.	In the Admin module
Person Responsible	Person who can define which employees should process the ticket. They are notified when the process is being worked on. The person responsible can also be the owner.	In the ticket
Priority	Priority levels denote different levels of urgency and can be used to categorize tickets. They are indicated by a traffic light color code.	In the ticket
Queue	Element used to classify requests. The use of multiple different queues (e.g. for specific departments) enables inbound tickets to be categorized and organized. In KIX, queues are referred to as teams.	In the ticket
Response Time	Another word for First Response Time.	

Term	Explanation	Usage
Role	This is where you assign the permissions that define what the agent is allowed to/not allowed to edit in the system. Agents can have several roles.	In the Admin module
Self Service Portal	Client portal, which is connected to KIX. Only usable with KIX Pro	
Service	Stands for a service/performance that a company offers. Services are part of Service Level Agreements (SLA).KIX Pro includes the asset class "Service" to manage services.	In the ticket, e.g. maintenance or repair services
Service Level Agreement (SLA)	Agreement between a service provider and its customer. An SLA regulates which services the provider provides and which service standards are defined that the provider undertakes to comply with (e.g. response time to enquiries, resolution time in the event of problems, etc.).	E.g. in the ticket
State	The status defines in which processing state a ticket is.	In the ticket
Sidebar	Additional information at the edge of the screen, which can be expanded and collapsed as required.	E.g. the digital notepad
Solution Time	Period of time during which a failed service must be restored. The time begins with the notification of the incident and ends once it has been resolved. To mark ticket as resolved, set the ticket state "closed".	E.g. in the Admin module
State	The state defines the processing state of a ticket.	In the ticket
SysConfig	Abbreviated term denoting the system configuration of KIX.	In the Admin module, menu System > SysConfig

Term	Explanation	Usage
Team	Element used to classify requests. The use of multiple different teams enables inbound tickets to be categorized and organized. Another word for team is queue.	In the ticket
Template	Individually configured input mask for creating tickets (malfunction, average, holiday request, etc.). Individual templates are only possible in KIX Pro. KIX Start contains a customisable standard template for all tickets.	In the ticket
Ticket	A service operation including the totality of all its communication and documentation steps in the form of incoming and outgoing emails, documented calls, notes or customer feedback via the web front end. They • are requested by a contact (organisation). • are assigned to a team (queue) as well as a processor and responsible agent. • have a priority as well as a type and status.	In the Ticket module
Ticket Lock	Means that special actions for a ticket can only be performed by the owner. This is designed to prevent the ticket from being processed by several people at the same time, or make this less likely.	In the Ticket module
Type/Ticket Type	Classifies the nature of a request, e.g. incident, problem, service request, etc.	In the Ticket and Admin modules
Update Time	Describes the time during which communication (call, email) with the customer (organization) must take place. If there has been no communication with the customer upon reaching the update time on the ticket, the ticket is considered escalated.	In the ticket
User	A person who works with the system. For example, an agent, the admin, a contact with system rights, a user of the Self Service Portal.	

Term	Explanation	Usage
Widget	Term for small, separate windows in a program; a portmanteau of the words "window" and "gadget".	Diagram widgets, table widgets, sidebarwidgets
Workflow	A workflow describes the concatenation of different, consecutive steps within a business process. In the Admin Module, the administration of templates, actions and rule sets can be found under Workflow.	E. g. Add-on "ITIL Practices"

3 Login

KIX is a browser-based service system. Open your browser and enter the respective URL, which you should receive from your administrator. The login page will open.

Enter your username and password in the respective fields. Then click "Login". By clicking on the eye symbol you can see your password as plain text to correct spelling mistakes if necessary. ⚠ If you switch to plain text display, make sure that only you can see the screen!

Following successful authentication, you will have access to the system.

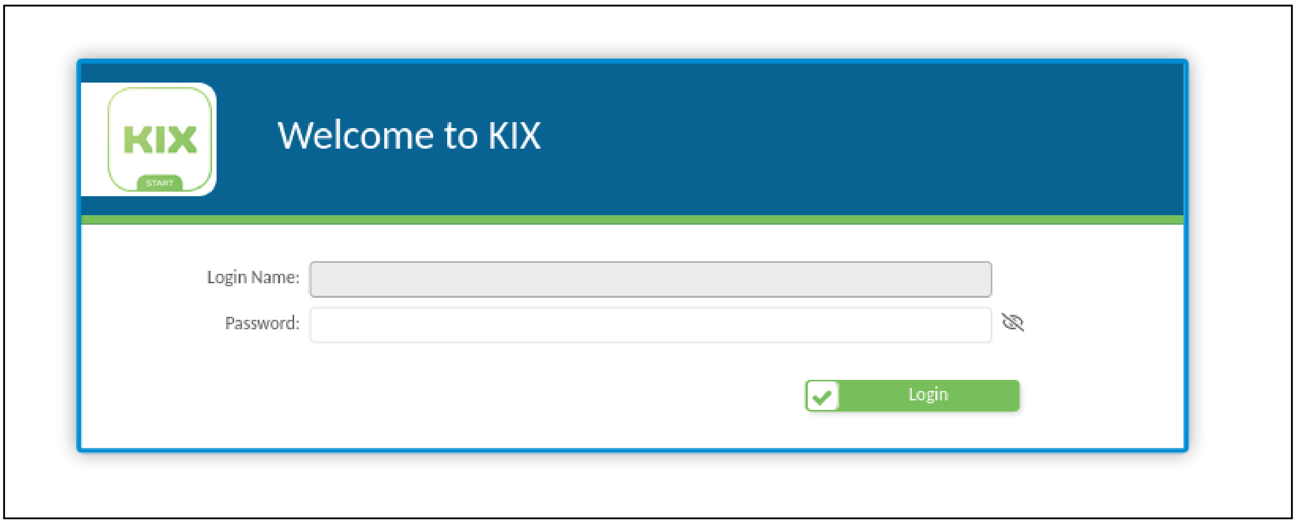


Fig.: Login Screen

If you have administrator rights and are using KIX 18 for the first time, KIX will open with the setup wizard. This will guide you through the initial setup in just a few steps. Information on the setup wizard can be found in the admin manual.

3.1 Welcome page

After the initial login, the welcome page opens to give you first impressions of KIX. You can return to this page at any time later by clicking on the question mark icon in the header.

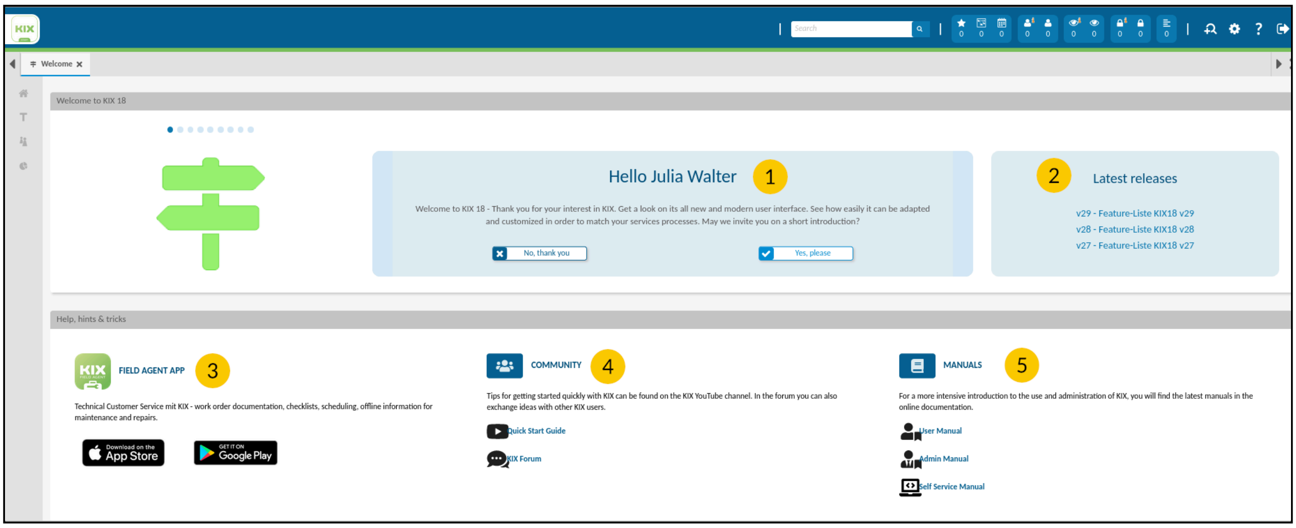


Fig.: Welcome page

1	Welcoming	Under this point there is the possibility to get to know the different elements of KIX. Click on the button "Yes, please" to view the short introduction. Alternatively, you can find the information here.
2	Latest Releases	Here you will find information on the latest releases of KIX. Clicking on the respective release version will take you to the forum and a detailed description of the functions contained in this release.
3	KIX Field Agent App	With the KIX Field Agent app, field staff always have access to their tickets. Depending on your operating system, you can find the app in the Apple App Store or the Google Play Store.
4	Community	Here you will find links to quickly get your questions about KIX answered: • KIX 18 Quick Start Guide: Getting Started - SETUP ASSISTENT (YouTube Channel) • KIX Forum: Possibility to exchange information with other users or the KIX Support Team
5	Manuals	Behind these links you will find the manuals with in-depth information on the use and administration of KIX.

4 Home Dashboard

After logging in, you will automatically land on the "Home Dashboard" – the main user interface. Here is a snapshot of the individual elements:

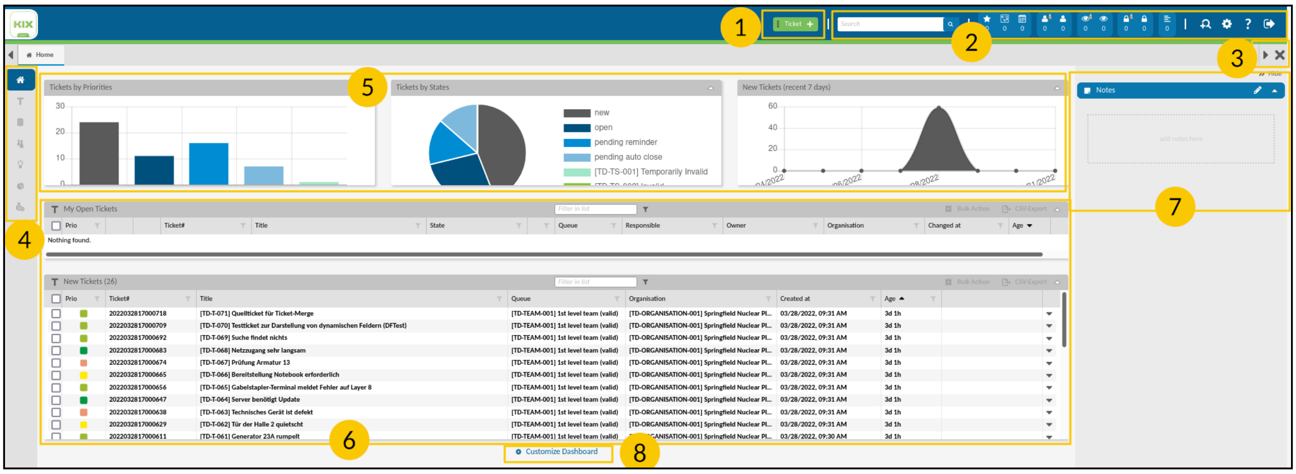


Fig.: Home Dashboard Overview

1	Create new object
2	Quick search, personal toolbar and special features
3	"Close all Tabs" button
4	Module bar
5	Statistical analysis
6	Content
7	Digital Notepad
8	"Customize Dashboard" button

<u>Create New Object</u>

Behind this button is the possibility to create new objects. If you move the mouse over the button, a drop-down menu opens. In this you can choose from the items "New Ticket", "New Asset", "New Organisation", "New Contact" and "New FAQ".

<u>Complex search</u>

You can use this field to call up specific information directly or to search specifically for tickets, assets, customers, organizations or FAQs. If you move the mouse over the button, a drop-down menu opens in which the individual search categories can be selected.

<u>Personal Toolbar</u>

The personal toolbar contains various icons: the favorites, the personal Kanban board, the personal calendar, the person, the eye and the lock. The person stands for "My tickets", the eye for "My watched tickets" and the lock for "My blocked tickets". Each icon is available in two versions: one with an "i", one without. The  stands for new articles on the respective ticket.

Under each icon there is a number that shows the number of tickets available.

<u>Special Features</u>

There are three icons in the special functions: the gear wheel, the question mark and the door with an arrow pointing to the right. If you click on the gear, you can make personal settings on the KIX. Clicking on the question mark takes you to the KIX-internal help page. The door with the arrow pointing to the right is the logout or logout symbol. Click here to log out of KIX.

<u>"Close all Tabs" button</u>

To be able to quickly restore clarity when there are many open tabs and to tidy up the workspace without much effort, there is this "X" button.

<u>Menu Bar</u>

The menu bar is shown with icons. If you move the mouse over it, you can see in text form what the respective icon stands for.

Clicking on the respective icon takes you to its overview (the respective dashboard).

Statistical Analysis

The three widgets show current, statistically processed evaluations of the tickets.

In the widget "Tickets by status" you can hide individual statuses by clicking on them.

Sidebar

Digital Notepad: Your digital sticky note is located on the right edge of the dashboard, which replaces the post-it on the screen. You can find additional information on this in the section "Explanation of functions".

Content

Below the statistical evaluations there are two ticket tables.

The first table shows tickets for which the logged in user is responsible or processor. The tickets are sorted in descending order by age. This means that the oldest tickets are displayed first.

The second table "New Tickets" is an illustration of all tickets that have the status "New". It is sorted in ascending order by age. This means that the most recent tickets are displayed first.

Note

Please note that when creating a new ticket, the ticket state must be selected as "new" for the ticket to be displayed in the "New Tickets" table.

4.1 Personalize your Home Dashboard

By clicking on the gear wheel or the "Customize Dashboard" button below the tables, the Home Dashboard switches to edit mode.

You can use search templates to personalize your home dashboard and adapt it to your needs. Search templates you have saved (results of a complex search, e.g. for assets with the designation "thin 42" in the name) can be selected via the "Search templates" drop-down menu and integrated into the dashboard by clicking on "Add widget".

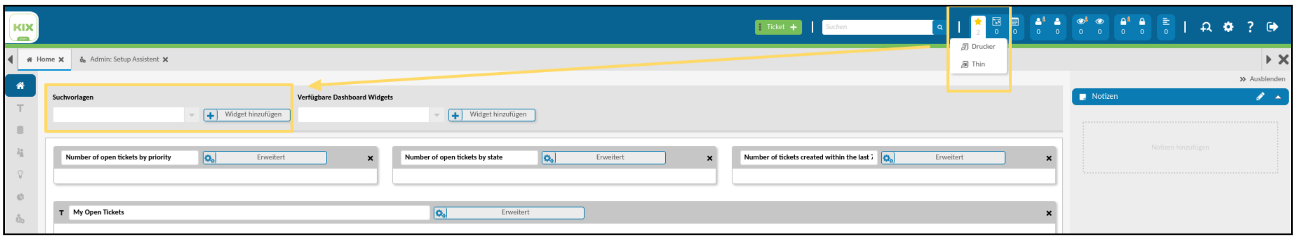
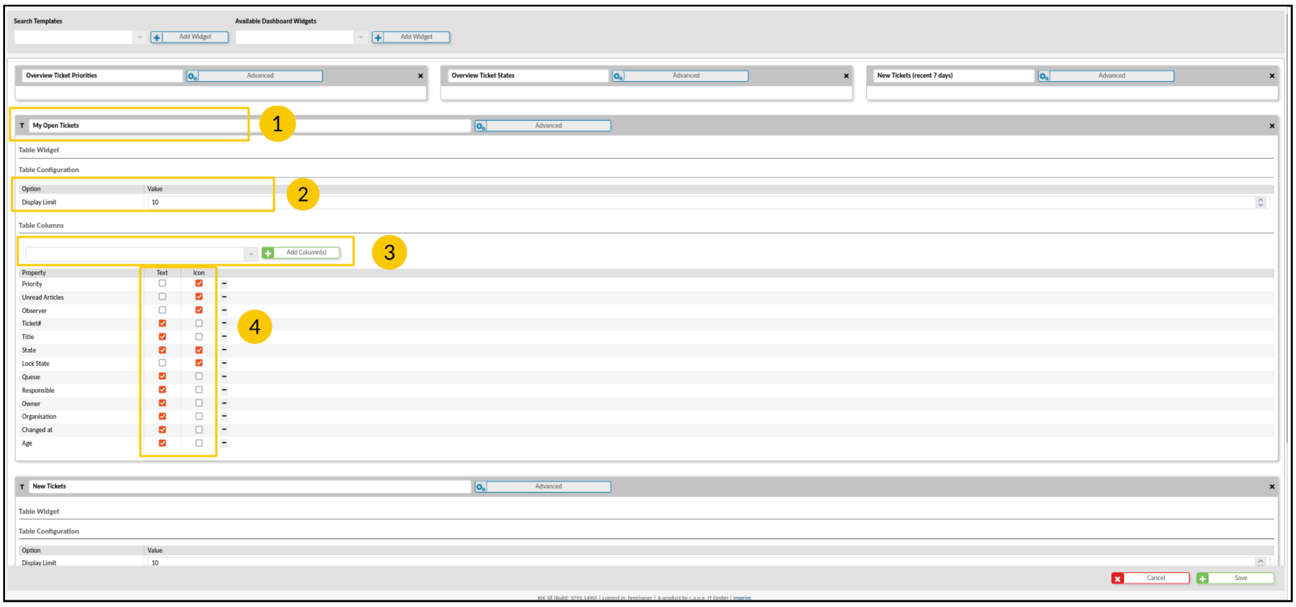


Fig .: Home Dashboard in configuration mode

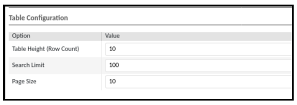
The basic structure and arrangement of widgets on the home dashboard can also be configured. Wigets can be moved on the dashboard using drag and drop.

The widget can be deleted from the dashboard by clicking the "X". It can be added again at any time using the "Available Dashboard Widgets" drop-down menu.

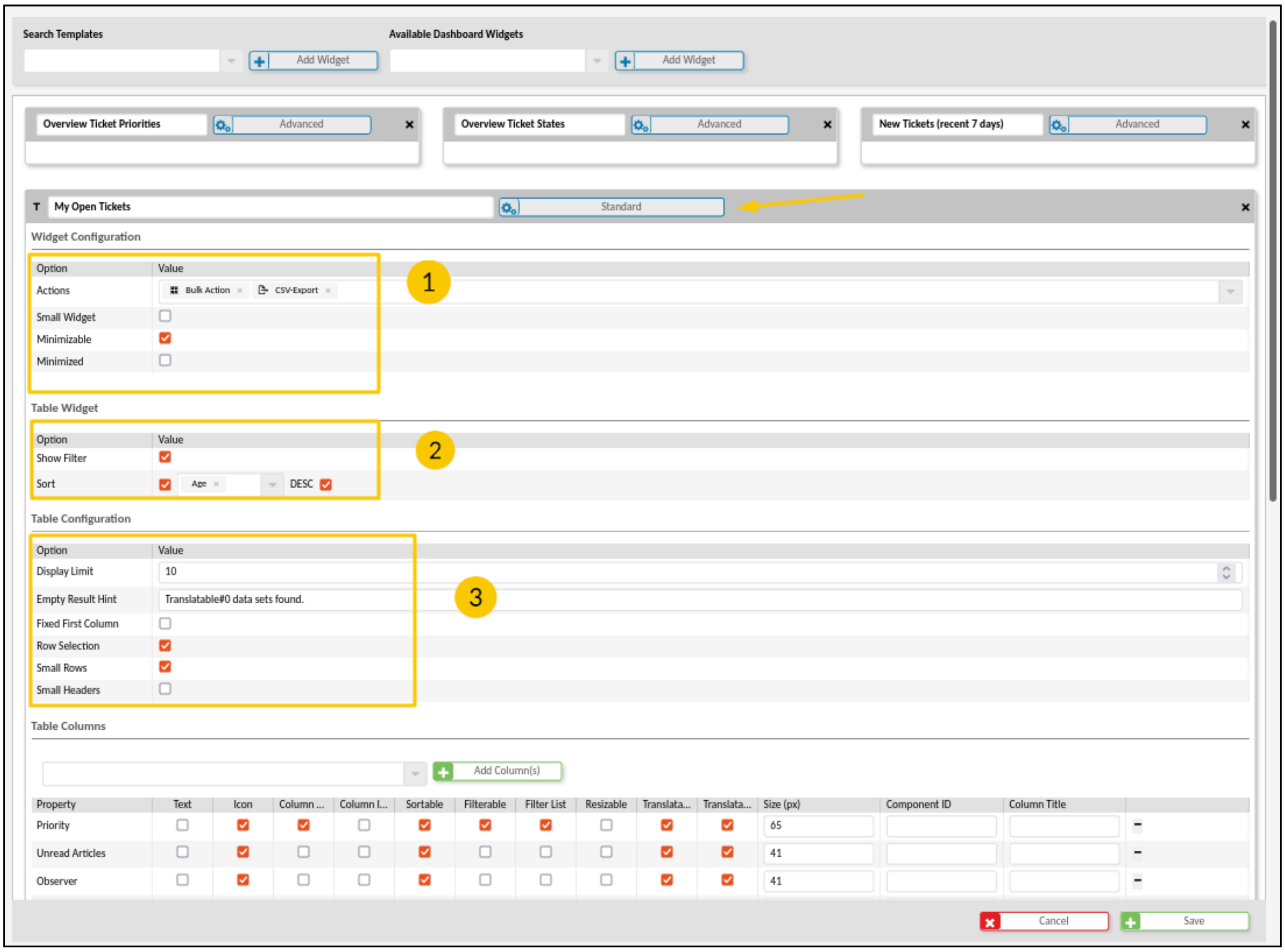
You can use the "Small widget" checkbox to adjust the size of the widget. If the checkmark is set, the widget is displayed in the small view. If the checkbox is empty, the widget is displayed large.



In the standard setting, widgets can be configured in more detail. This affects the widget title as well as the tables themselves and the individual columns of the tables.

<table>
<tr><th></th><th>Function</th><th>Description</th></tr>
<tr><td>1</td><td>Change widget title</td><td>Click in the box and change the title of the widget as you like.</td></tr>
<tr><td>2</td><td>Table Configuration

</td><td><table>
<tr><td>Table Height</td><td>Table display height</td></tr>
<tr><td>Search Limit</td><td>Maximum number of records loaded from the database</td></tr>
<tr><td>Page Size</td><td>Number of records displayed in the table
the table will be increased by this number of records when clicking the "Load more" button</td></tr>
</table></td></tr>
<tr><td>3</td><td>Adjust table columns</td><td>You have the option of adding further ticket properties to the table from the drop-down menu. Select the appropriate property by checking it and click on "Apply".
The properties can be rearranged in the overview below using drag & drop.</td></tr>
<tr><td>4</td><td>Select text or icon</td><td>By ticking the box, you select whether the content of the column appears as text, icon or text and icon.</td></tr>
</table>

The "Advanced" setting (button see yellow arrow in figure) offers more complex setting options. The various actions, such as collection campaign and filter, and optical settings, such as Adjust widget size and column size.

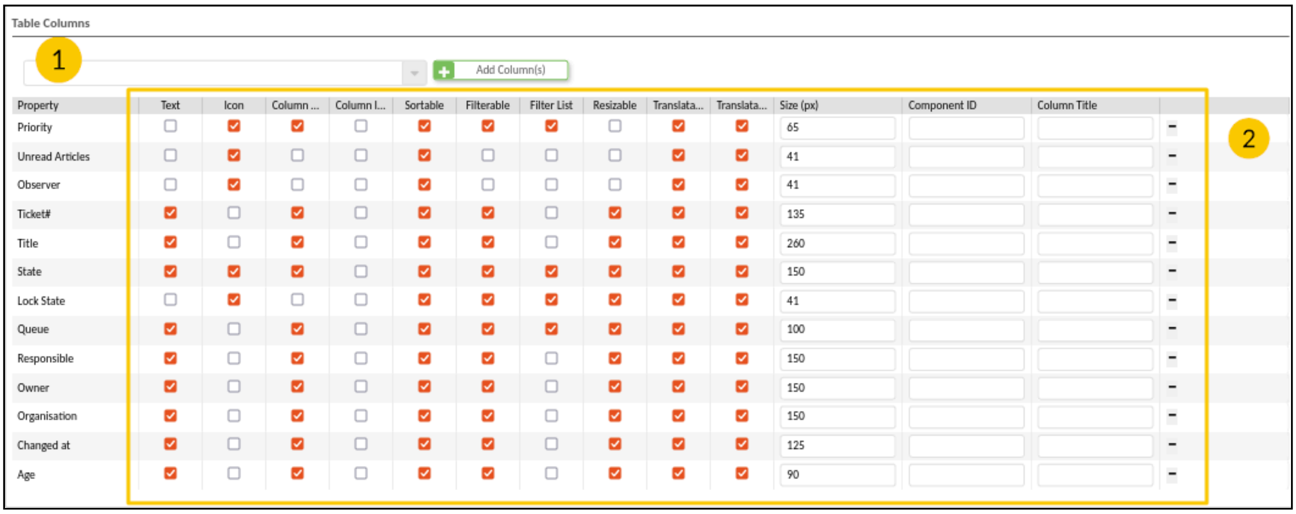


	Settings for ...	Option	Description
1	Widget Configuration	Actions	Select from the drop-down menu which actions should be available in the header of your table. The options are: collection campaign and CSV export.Save your selection by clicking the "Submit" button.Select several options from the list, first click on "Apply" and then on the button "Add column (s)".
		Small Widget	By selecting this action, the table widget assumes 1/3 of the original size, analogous to the statistical evaluations in the standard setting.

	Settings for ...	Option	Description
		Minimizable	Specifies whether the widget can be reduced in size. The next field can only be selected if a checkmark is set here.
		Minimized	The selection determines whether the widget is initially reduced / collapsed.
2	Table Widget	Show Filter	Select whether a full text filter should be available in the header of your table.
		Sort	By checking this option you can arrange your table according to the selection in the drop-down menu behind it. For example, the table is initially sorted according to the ticket number. You can also choose whether to sort in ascending or descending order.
3	Table Configuration	Display Limit	Enter the number of lines to be displayed in the table here.
		Empty Result Hint	The text entered here will be displayed if the table contains no data.
		Fixed First Column	If this selection has been made, the first column "fix" remains in the first position when scrolling horizontally.
		Row Selection	Check this box to allow individual lines to be selected. ⚠️ This is necessary in order to be able to carry out the "collective action".
		Small Rows	By ticking the box, you select the display format in which the lines are shown in small format.

	Settings for ...	Option	Description
		Small Headers	By ticking the box, you select the display format in which the headers are reproduced in a reduced size.

Within the table, too, there are many ways of adapting it to your personal needs.



1	Property	Each table on the Home Dashboard initially has the properties listed here in the first column. Additional properties can be added using the drop-down menu above the setting table. Save your selection by clicking the "Apply" button. Select several options from the list, first click on "Apply" and then on the button "Add column (s)".	
2	Adjustment options for the individual properties	Text	By ticking the box, you select whether the content of the column appears as text.
		Icon	By ticking the box, you select whether the content of the column is displayed as an icon.
		Column Title	By ticking the box, you select that the column title is displayed.
		Column Icon	By ticking the box, you select that an icon should be displayed in the column title.
		Sortable	By ticking the box, you make this table cell sortable.

		Filterable	By ticking the box, you make this table cell filterable.
		Filter List	If the column can be filtered, use this check mark to specify that the filter is available as a selection list. Otherwise the filtering is done by entering free text.
		Resizeable	By ticking the box, you can make this table cell adjustable in size.
		Translatable	By ticking the box, you make this table cell translatable.
		Translatable Title	By ticking the box, you make the column header translatable.
		Size (px)	Define the size of the table cell.
		Component ID	If necessary, enter individual components here. Possible values (selection of the most important): • Dynamic field value: "dynamic-field-value" • Checklist progress bar: "dynamic-field-checklist-cell" • Label of an SLA criterion: "sla-criteria-cell"
		Column Title	If necessary, enter your own column title here (e.g. transaction number instead of ticket number)
		-	Delete the line

Note on translations

Translations must be entered into the system separately by the admin. The system can only use this if there is a corresponding language pattern in the background.

Finally click "Save" to confirm the changes.

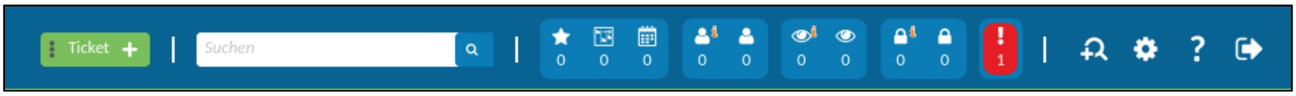
The personalized home dashboard is stored in the preferences of your user account so that the appearance and structure of the home dashboard are retained even after logging out.

If you remove a personalized widget and add it again, it will be reinserted to the default setting.

> If you want or need further widgets with general reports, contact your admin. He can configure them and provide them to you in the "Available Dashboard Widgets" selection.

5 Toolbar

The Toolbar is located at the top of the screen.



The toolbar enables you to create new objects quickly and easily and to search for tickets. It also provides you with an overview of your current personal ticket situation and offers various ways of personalizing KIX.

5.1 New Objects

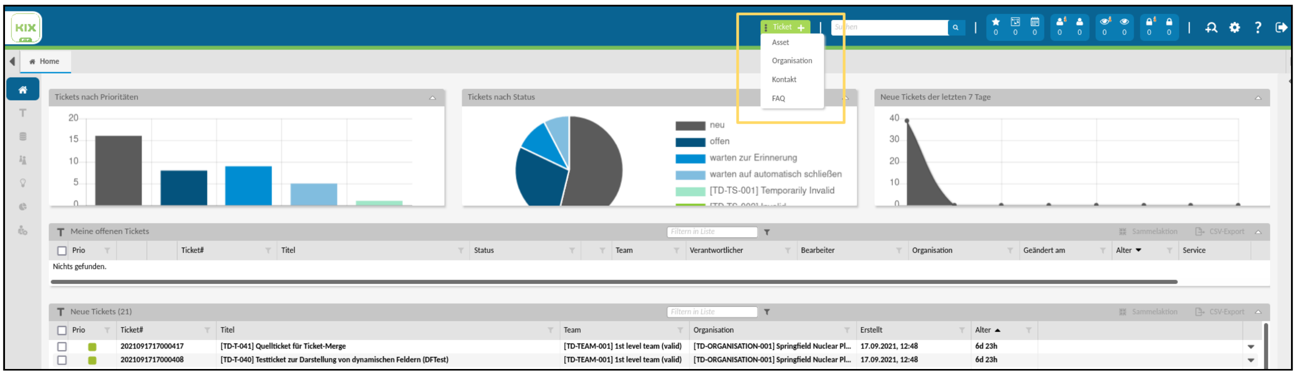


Fig .: "Ticket" button on the home dashboard

Here you have the option via the drop-down menu

- a new ticket
- a new asset
- a new organization
- a new contact or
- a new FAQ

to put on.

If you switch to another dashboard, this button is assigned the corresponding object, that is, on the asset dashboard you will find the button "Asset" etc.

5.2 Complex search

The complex search can be accessed both in the toolbar and via the magnifying glass symbol in the module menu.

There is a quick search in the toolbar. According to the respective dashboard, the search takes place in these objects. This means that the ticket dashboard is searched for the entered keyword. So enter the desired search term and click on the magnifying glass icon.

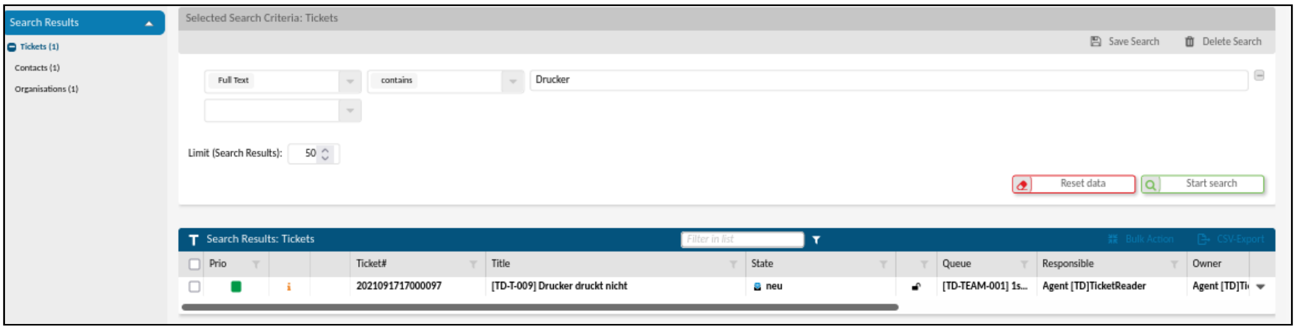


Fig .: Result for the keyword "Drucker" on the ticket dashboard

A drop-down menu is available behind the magnifying glass symbol in the personal tools, via which you have the option of

- Ticket
- Asset
- Organization
- Contact or
- FAQ

to search. The search always follows the same pattern:

- Select the area (e.g. asset) in which you want to search from the dropdown. Enter criteria (attributes) that you want to search for. Start the search by clicking on "Start Search".*
- A "Complex search result" tab opens. In the result list you will find all relevant entries that match your search criteria.

In the result list for a ticket search, the oldest ticket appears first. Background: Teams are the organisational core of ticket processing. Within these teams, work is done according to the FIFO principle (first in, first out). This means that the focus is on the oldest requests, which require more attention and quick processing.

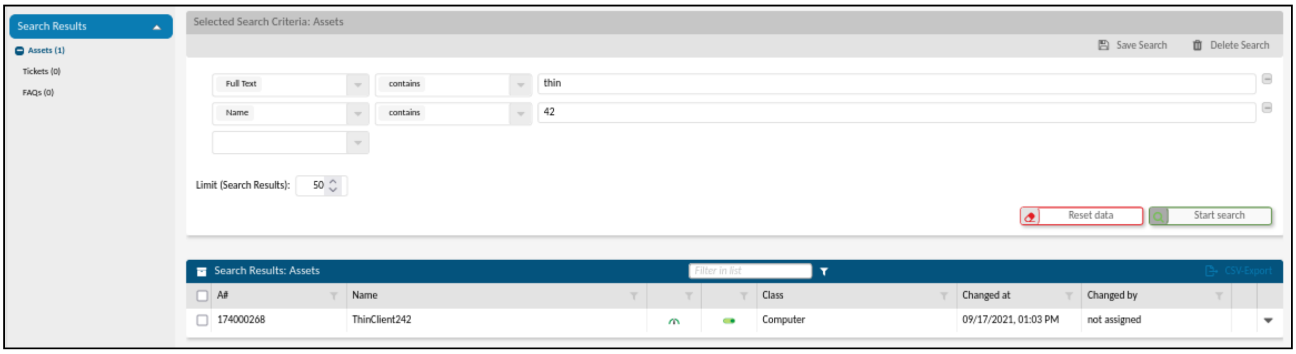


Fig .: Result of complex search "thin + 42" in assets

In the result list you can click directly on individual lines to get to the respective detailed view.
Further actions are also available here:

- Edit search
- Save search
- Clear search

Information

- If you are searching for the age, the time must be entered in seconds, e.g. "86400" (seconds for 24 hours).
- The search does not find any archived tickets. If you want to display these, you must explicitly state this (State - contained in - closed).

5.2.1 Edit search

If you want to edit the search, use the complex search form filled with the specifications from the previous search.

In the first column you can select the attributes you want to search for. In the second column you select the search operators. You can enter text in the third column. For some attributes, a dropdown offers you specific selection options, for some a free text search is available.

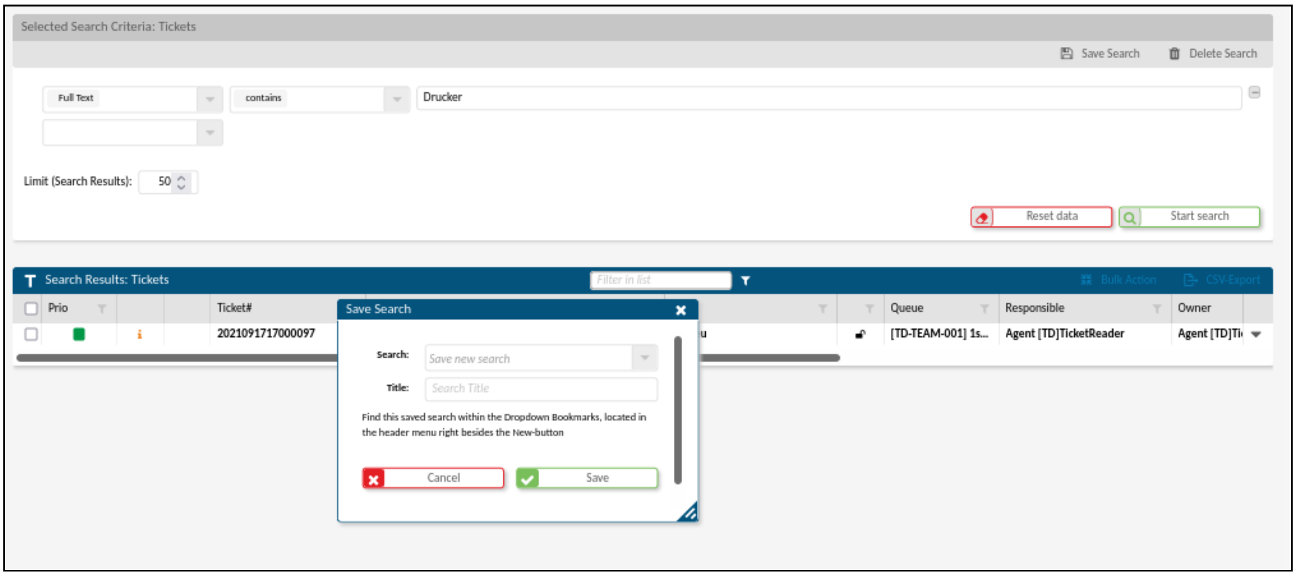
Start the search by clicking on "Start Search".

If you want to clear the search criteria, click on "Reset data". This clears the form fields and you can start a new search.

To view the entries from the list, click directly in the line of a hit result. The corresponding entry will then open in a separate tab in your browser.

5.2.2 Save search

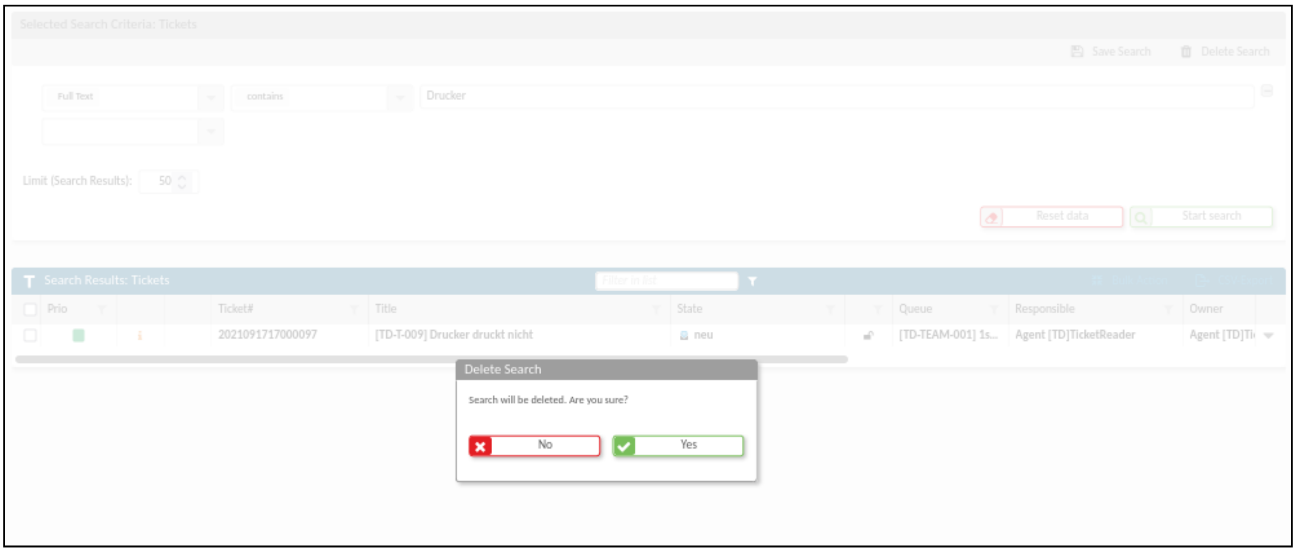
In order to carry out the same search again later, you can save it by clicking on "Save search". An overlay opens in which you can enter the title under which you want to save the search.



This will then be displayed in the toolbar in the "Favorites" dropdown. If you have already saved searches, you can select an existing one from the "Search" dropdown and overwrite it with the currently selected values.
In the KIX Pro, you can also use the saved search results to configure a personal home dashboard.

5.2.3 Delete search

To delete the search, click the corresponding button. An overlay opens with a security question.



Confirm the deletion by clicking "Yes".

5.2.4 Hints

The following applies to the **search for assets**:

- The search always refers to the current version of the asset.
- If you have not selected one or more asset class(es), only the attributes that all or the selected classes have in common are available.
- ⚠️ The result list for the search always shows the current version information.
- It is possible to search through older asset versions. To do this, activate the "Include previous version" checkbox.
    - The asset name and all parameters that are searchable (e.g. incident status and usage status) are searched. Your administrator can specify which parameters are searchable.
- Basically, all search criteria can be searched. Your admin must make the appropriate settings for this. Please contact him if necessary.

You can use the following special characters to **search for contacts**:

- "&": This allows terms to be combined (AND link), e.g. search for "Max + Muster" searches for "Max" and "Muster" and finds the contact Max Mustermann
- "+": Same function as "&"

  - + in search for telephone numbers: By manually entering the telephone number, e.g. "+49123456789", a contact can be searched for and found. Combination searches (e.g. "+49123 & Joe") are only possible if your admin has configured the system accordingly. If in doubt, contact him.
- "|" This allows terms to be separated in order to find everything that contains "either one or the other" (OR link), eg search for "Hark | Potts" searches for "Hark" OR "Potts" and finds the contacts "Bill Potts" and
- "Jack Harkness"
- "*": Unknown parts can be replaced by wildcards (*) at any position of the search phrase, e.g. search for "J * Yves" shows the contact "Jacque-Yves Cousteau"

You CANNOT use the following attributes to **search for tickets**:

- CloseTime (Closed at)
- CreatedPriorityID (Created with Priority)
- CreatedQueueID (Created with Queue)
- CreatedStateID (Created with State)
- CreatedTypeID (Created with Type)
- CreatedUserID (Created with User)
- AttachmentName
- body
- Subject
- Cc
- From
- To
- ChannelID
- SenderTypeID
- WatchUserID (Watch User)
- LastChangeTime (Last changed time)

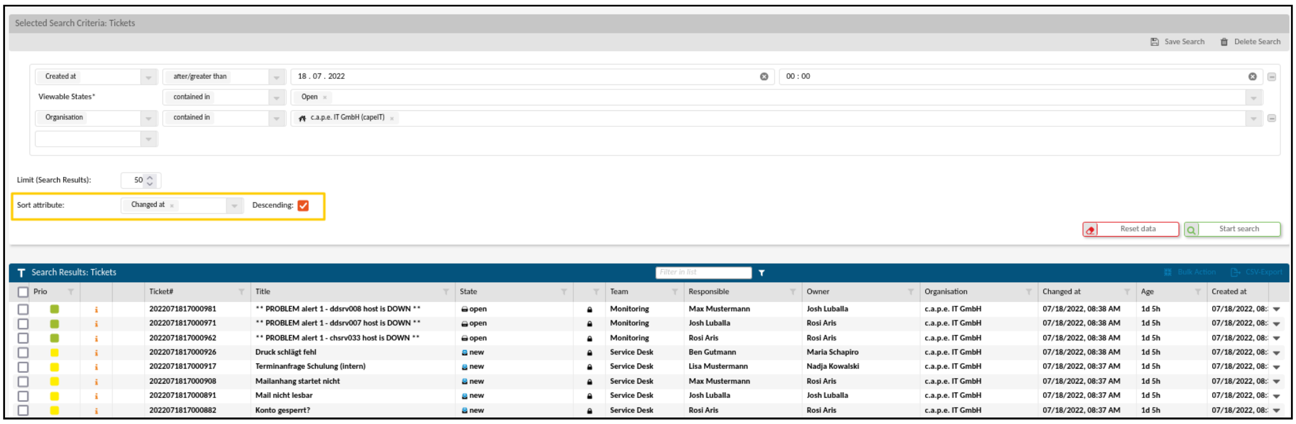
The value contained in the ticket is not available for the specified attributes and is therefore not found in the search

Searches or search results can be copied and called up again directly via URL.

> If the result list remains empty, there can be two reasons:
> - Either there is no entry or ticket for the search criteria you entered.
> - Or the criteria of your search are too imprecise or too extensive. Please check the criteria and start a new search.

5.2.5 Sorting criterion and direction

In order to obtain a reproducible search result, you can specify the sorting direction and the sorting criterion when defining a search.



To do this, select an attribute from the drop-down list that should be used for sorting. You determine the sorting direction by ticking the box behind the attribute selection. If a tick is set, the search is in descending order. If no tick is set, the search is in ascending order. If you haven't selected a sort attribute, the direction will be ignored. That means there is no sorting.

There is currently no sorting provided for the search by organization, contact and FAQ.

When searching for tickets and assets, not all attributes can be sorted, or there are attributes that make no sense. The following attributes are selectable and applicable:

- Asset:
  - A#
  - Changed at
  - ConfigItemID
  - Created at
  - Name
- Ticket
  - Enable for Self Service Portal (Artikel)
  - From (Artikel)
  - To (Artikel)
  - Cc (Artikel)
  - Subject (Artikel)
  - Body (Artikel)
  - Article Create Time
  - Changed at
  - Closed at
  - TicketID
  - Ticket#

- Created at
- Pending until
- Last changed at
- Title
- von Pro
    - SLA Criterion
    - SLA Criterion - SLA/Service Agreement
    - SLA Deviation
    - SLA Deviation (Service Time)
    - SLA Fulfillment Time
    - SLA Start Time
    - SLA Status
    - SLA Target Time
    - SLA Violation
    - Accounted Time
- Dynamic Fields
    - only of type Text, Textarea, Date and DateTime
    - and only valid

Selected search operators

The following is an explanation of the search operators:

Is equal to
The value to be found is exactly the same as the value entered.
e.g .: Name of the team: "Purchasing", is found by entering: "Purchasing"

Starts with
The value to be found starts with exactly the entered value.
e.g .: Title of the ticket: "Problem with printer in the meeting room", is found by entering "Problem"

Ends with
The value to be found ends with exactly the entered value.
e.g .: Title of the ticket: "Problem with printer in the meeting room", is found by entering "Meeting room"

Contains
The entered value is contained in the value to be found.
e.g .: Title of the ticket: "Problem with printer in the meeting room", is found by entering "Printer"

Wildcard search
Similar to the search with "contains", but the user can replace unknown parts in any position of the search phrase with wildcards (*).
e.g .: Title of the ticket: "Problem with printer in the meeting room", is found by entering "Problem * in the meeting room"

Contained in
The value to be found is contained in one of the selected values.
e.g .: The user knows that the ticket they are looking for is in one of the "Purchasing", "Sales" or "Marketing" teams, but not in which one is found by selecting the "Purchasing", "Sales" and "Marketing" teams

The following operators are available to search for times:

Before/ less than
All tickets before the entered date / time will be found. It is possible to search for a date or a date & time only.
e.g .: The user wants to know how many tickets a customer has received before today, is found by selecting the corresponding customer as a search attribute and "Created" "before" the desired date as a further search attribute.

Until/ greater than
All tickets up to and including the entered date / time will be found. It is possible to search for a date or a date & time only.
E.g. The user wants to know how many tickets a customer has received by the end of a previous month, is found by selecting the corresponding customer as a search attribute and "Created" "by" the desired date as a further search attribute.

After/ equal or less
All tickets from the entered date / time will be found. The date itself is not included. It is possible to search for a date or a date & time only.
e.g .: The user would like to know how many tickets after December 24th. in the purchasing team is found by selecting the "Purchasing" team as a search attribute and adding "Created" "after" December 24th as an additional search attribute.

Since/ equal or greater
All tickets from and including the entered date / time will be found. It is possible to search for a date or a date & time only.
e.g .: The user wants to know how many tickets have been incurred in the purchasing team since the beginning of the month, can be found by selecting the "Purchasing" team as a search attribute and "Created" "since" the first of the month as an additional search attribute.

Between
All tickets between an entered start date / time and end date / time will be found. It is possible to search for a date or a date & time only.
e.g .: The user would like to display all tickets that were created by a specific customer in July, can be found by selecting the corresponding customer as a search attribute and adding "Created" & "between" 1.7. and 31.7.

The following operators are available to search for relative times:

Within the next
The user would like to see all tickets from a specific customer that have to be completed within the next week. This is z. B. found by selecting the relevant customer as a search attribute and "End of plan" & "within the next" & "1" & "week (s)" as a further search attribute.

Within the last
The user would like to see all tickets that were created by a specific customer within the last 24 hours. This is z. B. found by selecting the relevant customer as a search attribute and "Created" & "within the last" & "24" & "hours" as a further search attribute.

More than ago
The user wants to display all tickets from a specific customer that were created more than 10 days ago. This is z. B. found by selecting the relevant customer as a search attribute and "Created" & "more than" & "10" & "days ago" as a further search attribute.

In more than
The user would like to see all tickets from a specific customer that have to be completed in more than four weeks. This is z. B. found by selecting the relevant customer as a search attribute and "Plan end" & "in more than" & "4" & "week (s)" as a further search attribute.

Less than ago
The user wants to see all tickets from a specific customer that were created less than 10 days ago. This is z. B. found by selecting the relevant customer as a search attribute and "Created" & "less than" & "10" & "days ago" as a further search attribute.

In less than
The user would like to see all tickets from a specific customer that have to be completed in less than 8 hours. This is z. B. found by selecting the relevant customer as a search attribute and "End of plan" & "in less than" & "8" & "hour (s)" as a further search attribute.

For searches where an attribute satisfies two search conditions, use:

Within
The user enters two numeric values according to the scheme "type + natural number + time unit". In this way, the system searches and filters within two relative times. If a numerical value is missing, the filter is not accepted.

- The user would like to display all assets whose warranty expires in the last 1 day to 2 months.
- The result is found by selecting the Software class as a search attribute and "expiry date" & "within" & "last" & "1" & "days" to "next" & "2" & "months" as a further search attribute .

The 1st value (left) is saved with "gte - greater than equals" and should always contain the smaller value or use the type "of the last". The 2nd value (on the right) is saved with "lte - lower than equals". It should always contain the larger value or use the "next" type. If this is not the case, the values are exchanged for a sensible logic. Are both types the same:

- For the "last" type, the 1st numerical value plus the unit (on the left) must be greater.
- For the "next" type, the 2nd numerical value and unit (on the right) must be greater.

Otherwise the values are swapped.

A detailed overview can be found in the appendix of the Admin KIX Start 18 manual.

5.3 Personal Toolbar

Your "Personal Toolbar" contains various different icons:

- The star for the favorites
- The Kanban Board
- The calendar
- The person
- The eye
- The padlock

If you move the mouse over the star, saved search templates are displayed.

The Kanban Board gives you a basic overview of your personal tasks and allows you to organize your tickets by means of a KANBAN Board.

The calendar represents your personal calendar overview and shows you all upcoming tickets.

The person represents "My Tickets", i.e. all tickets to which you have been assigned as the owner.

The eye symbolizes "My watched tickets" and represents all tickets that you are watching.

The padlock symbolizes "My locked tickets" and represents all tickets that are locked for you.

The last three icons are depicted in two different versions: one with i and one without. The symbol with i represents tickets for which there are new articles. The symbol without i shows you the total number of tickets.

5.4 Special Features

There are three icons in this area.

Icon	Function

exclamation mark	"Notifications"
	If you see the exclamation mark, there are new messages for you.
	• The type of icon and the background color also indicate the importance
	  ◦ Exclamation mark/red - Important
	  ◦ Exclamation mark in triangle/orange - Warning
	  ◦ Exclamation mark/blue - Information
	  ◦ Text legend/blue - Advice
	Click to open the message in a separate window.

magnifier	"Search" Behind it is the complex search (see page 57) .
gear	"Preferences" By clicking this icon, you can configure your settings preferences for KIX.
question mark	"Help" By clicking this icon, you can access the internal KIX help page. ⓘ You can also find a German-language quick start guide as well as other German-language videos on the KIX on our YouTube channe[2]l .

2 https://www.youtube.com/watch?v=CqCNIvdhayo&list=PLyKz2PdXNlw3b13FZEPP9CcFMTFRvFQh-

Icon	Function
door with an arrow pointing to the right	"Logout" This is the logout symbol. Click here to log out of KIX.

5.4.1 Settings Preferences

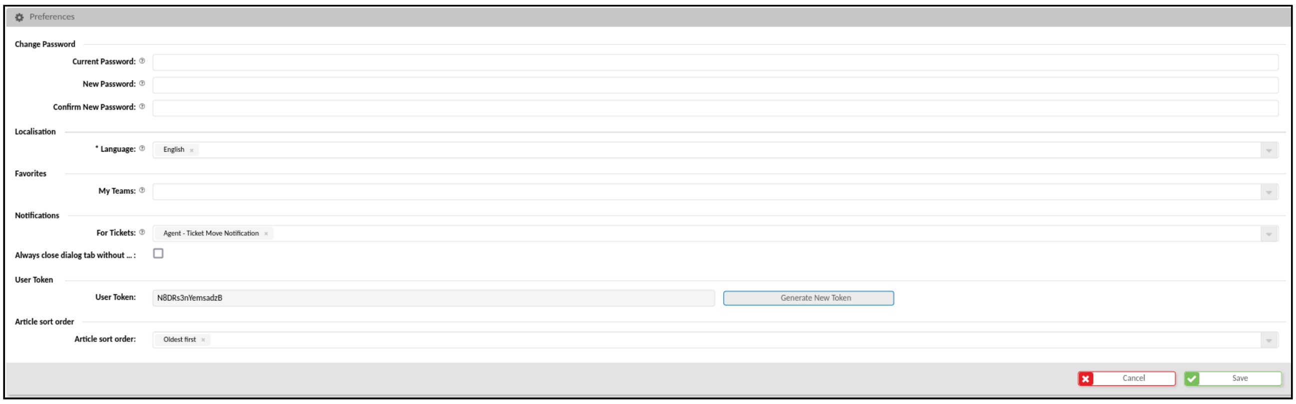


Fig.:"Settings preferences" Form

In this area you can configure your settings preferences. These come into effect once you save the form.

Categroy	Explanation
Change Password	Here you can set a new password for accessing KIX. To do so, enter your old and new chosen password, and then re-enter your new password. By clicking on the eye symbol you can see your password as plain text to correct spelling mistakes if necessary. (Warning) If you switch to plain text display, make sure that only you can see the screen! If you have forgotten your password, please contact your administrator. They will be able to issue you with a new password.
Localization	Language: Select the language in which you would prefer to use the application.

Categroy	**Explanation**
Favorites	My Teams: Select the teams from the drop-down list, • for which you want to receive notifications when a new ticket is created for them or changes are made to existing tickets. • to be available for selection when creating a new ticket via the Field Agent app. If you have not selected or stored a team, KIX uses the default setting. You can only select teams for which you have read and write permission. If you have any questions, please contact your admin.
Notifications	For Tickets: From the drop-down menu, select the notifications that you would like to receive. Using the mouse, hover over an entry to receive additional information about the notification.
Always close dialog tab without asking	If you check this box, the security question when closing a dialog will be omitted.
User Token	This personal token allows direct access to report data. Be sure to create a new token if you have (accidentally) passed it on.
Article sort under	This selection determines the order of the articles in the communication history: • Oldest first • Newest first

6 Personal Kanban Board

Your personal Kanban Board gives you a organized overview of upcoming tasks: What new tasks are there? Which tickets have which state?

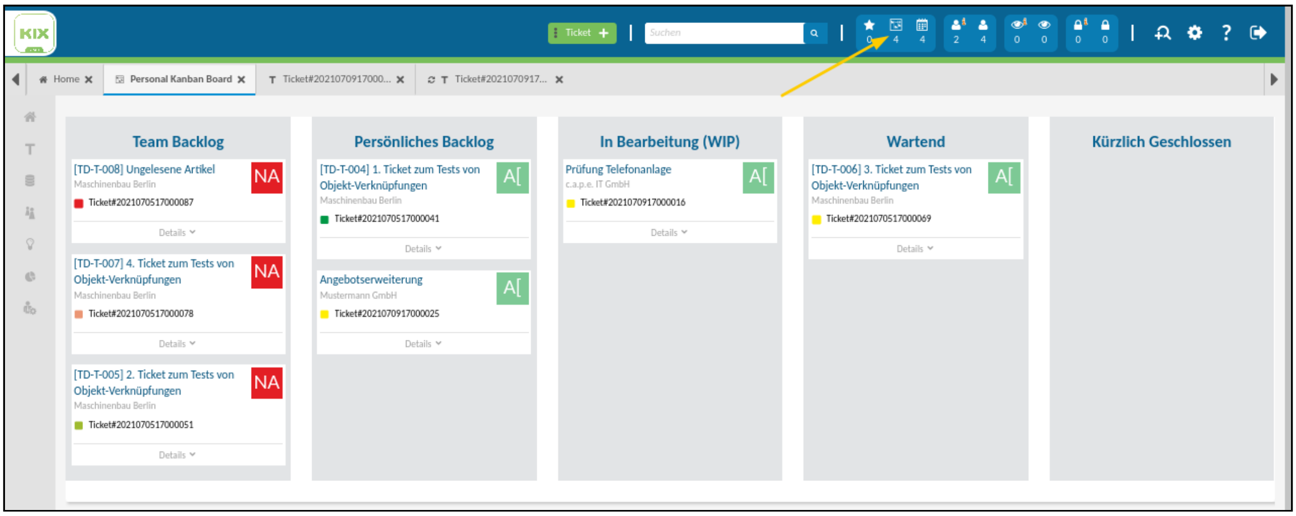


Fig.: Overview of Personal Kanban Board

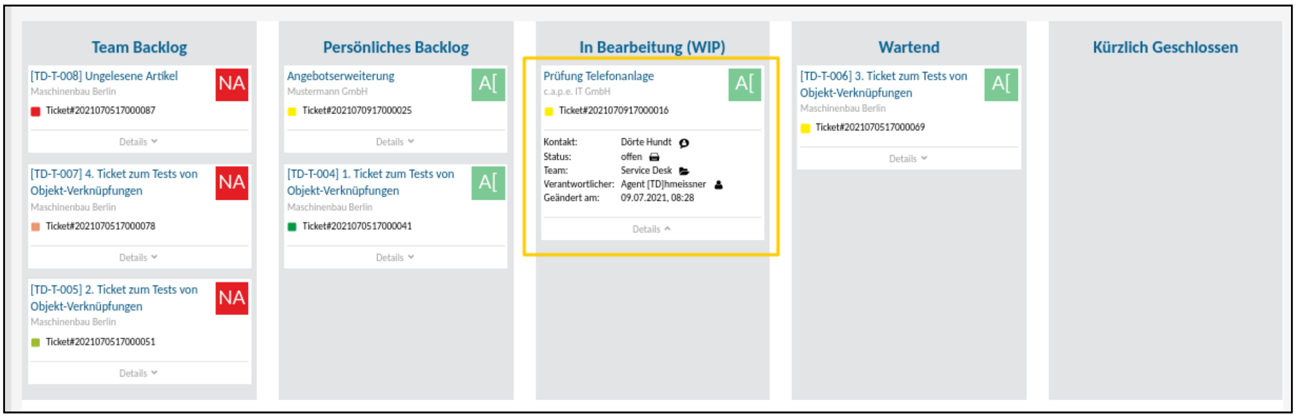
The toolbar contains the symbol  for your personal Kanban Board. The number below it indicates how many tickets are assigned to you as the owner.

The Kanban Board is structured like a table:

Team Backlog	This column contains tickets that have not been assigned an owner and have the state "New".
Personal Backlog	This column contains tickets for which you are the owner and have the state "New".
Work In Progress	This column contains tickets for which you are the owner and have the state "Open".
Pending	This column contains tickets for which you are the owner and have the state "Pending".

The tickets are displayed as tiles in the Kanban Board. Using Drag & Drop, you can move the tickets around anywhere in the board. When doing so, the owner and state are changed automatically in the background.

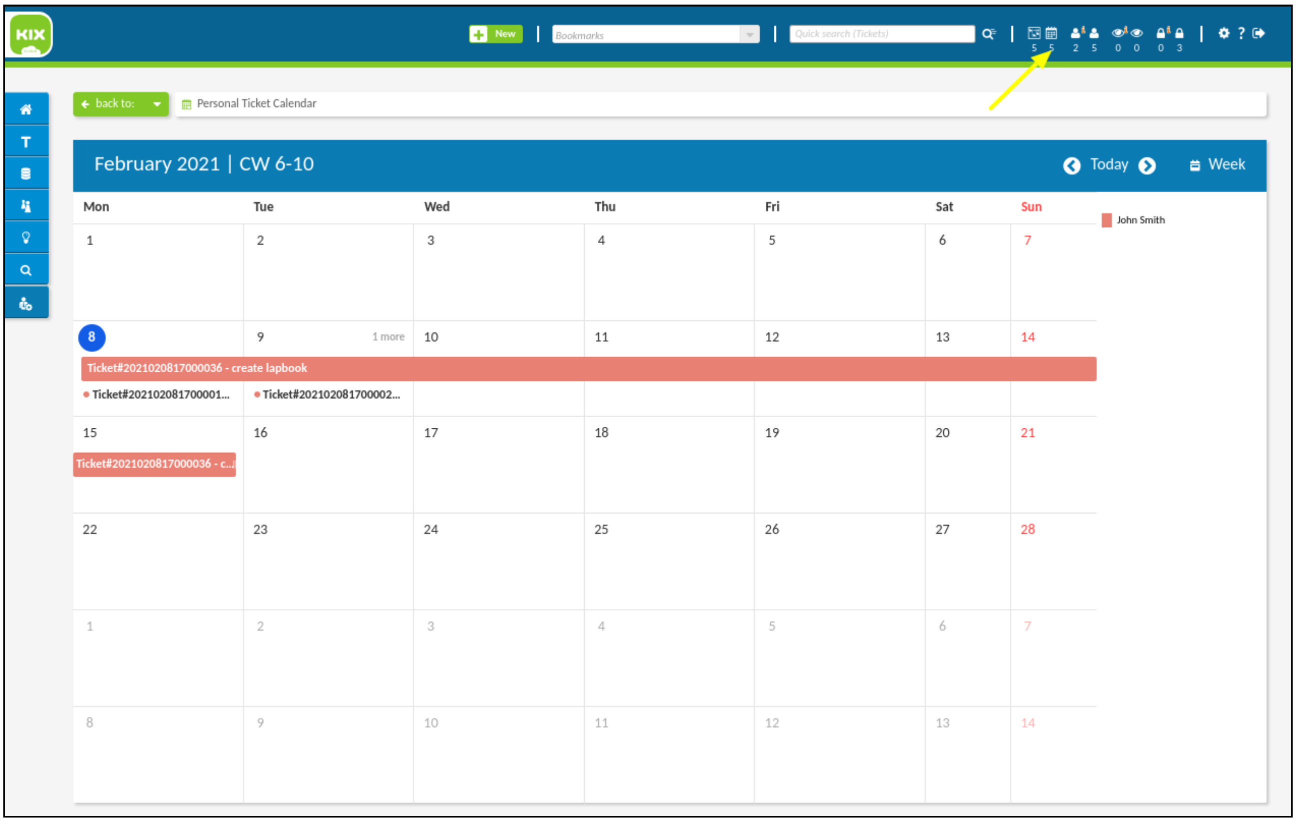
Click "Details" at the bottom of the tile. This opens a field with information about the ticket.



If you want to open the ticket, click the ticket title.

7 Personal Calender

Your personal calendar helps you to keep an eye on all your tasks and manage your time most effectively. There are many options for defining when these events occur: from a specific fixed date right through to a defined period of time.



The toolbar contains the symbol  for your personal calendar. The number below it indicates how many tickets are assigned to you as the owner. The tickets must have a value set in one of the ticket attributes in the period to be displayed.

In the calendar itself you can choose between the display formats "week" and "month" by clicking on it. By clicking on the arrows (to the left and right of "Today") you can move forward or backward in the calendar by the week or month, depending on your settings.

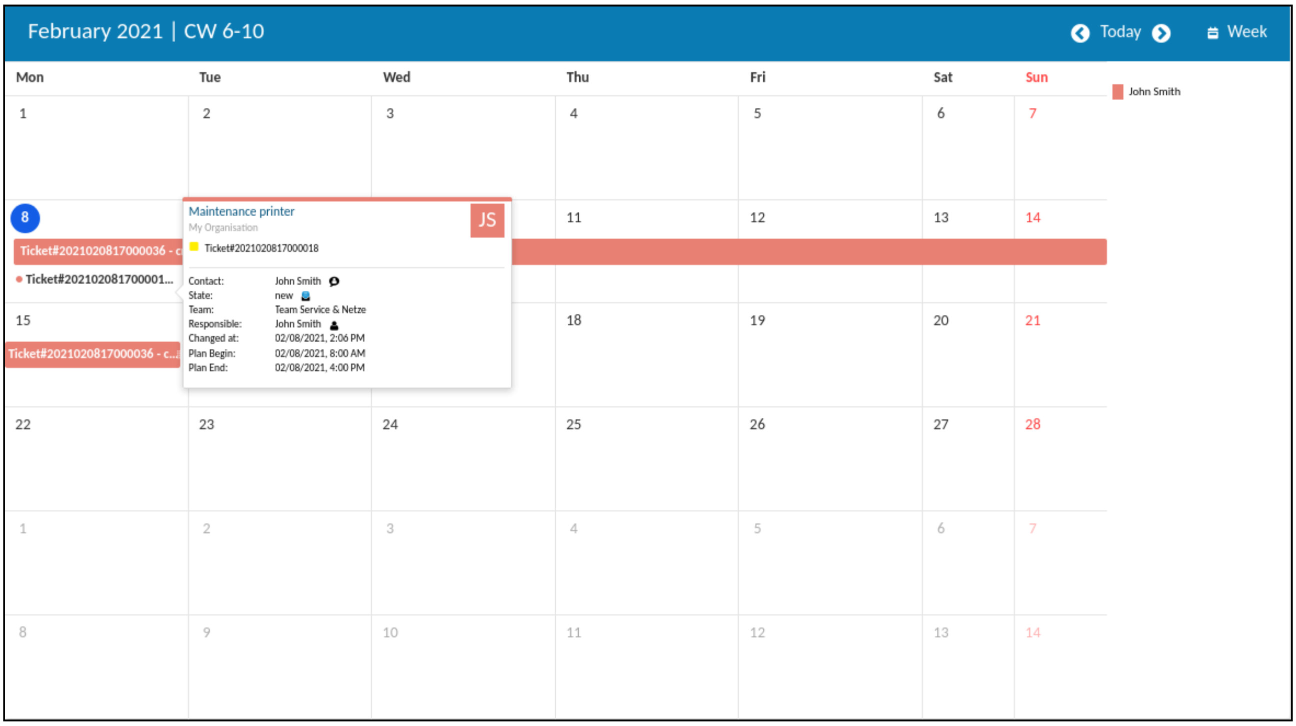


Fig.: Ticket Information View in Personal Calendar

The tickets/tasks are displayed as bars in the calendar, based on their specified duration (planned start/ planned end). Using Drag & Drop you can move the event around in the calendar or adjust the duration of the event. When doing so, the dates of the ticket are changed automatically in the background.

Clicking the event bar opens a field containing information about the ticket. If you want to open the ticket, click the ticket title.

8 Module Bar

The module bar is located on the left-hand side of the screen.

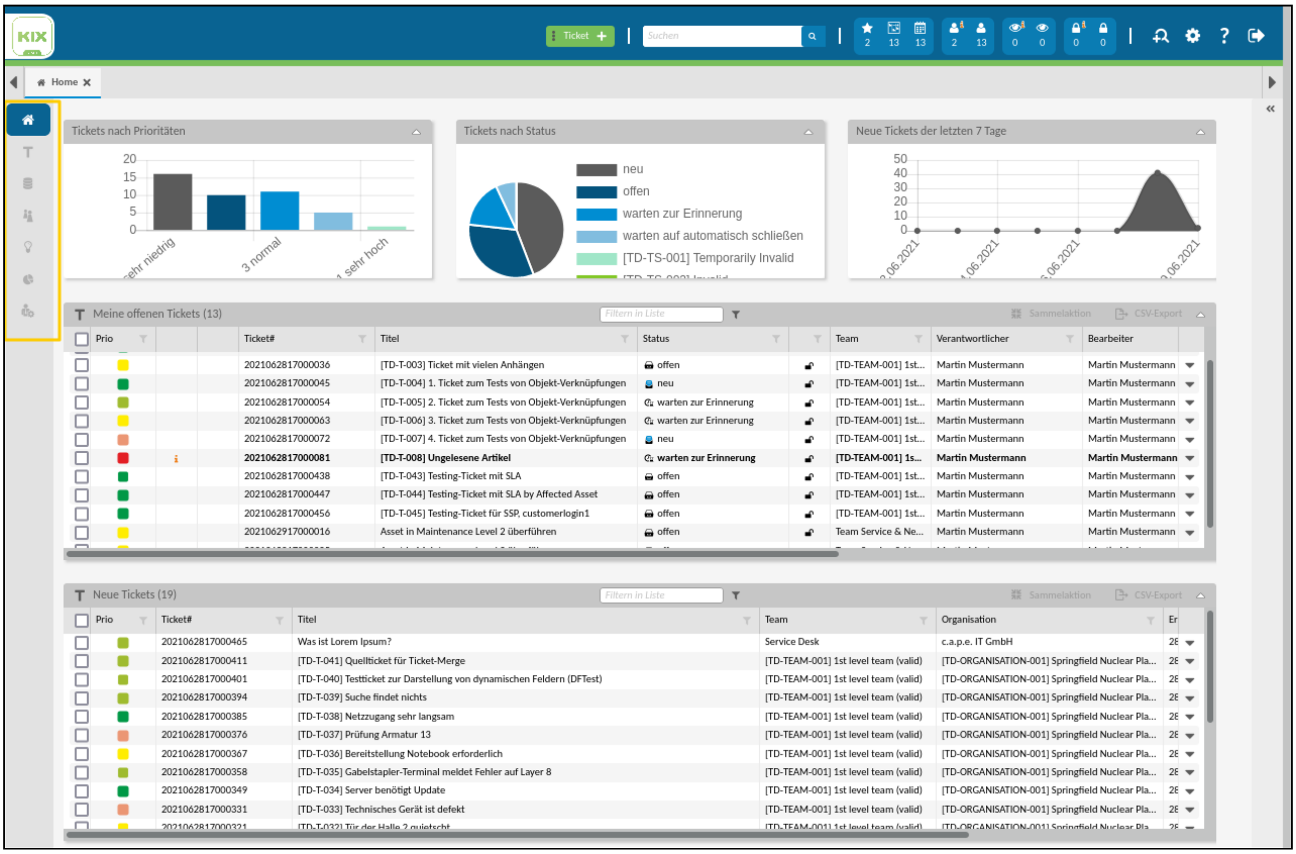


Fig.: Position of Module Bar

The module bar contains the individual dashboards for the different areas: Home, Tickets, Assets, Customers, FAQ, Advanced Search, Reporting and Admin area. If you hover over these module points with the mouse, their names will appear.

9 Ticket Dashboard

In the ticket dashboard, you will find all tickets contained in the system from the queues to which you have read permission. You can also carry out ticket-relevant actions here.

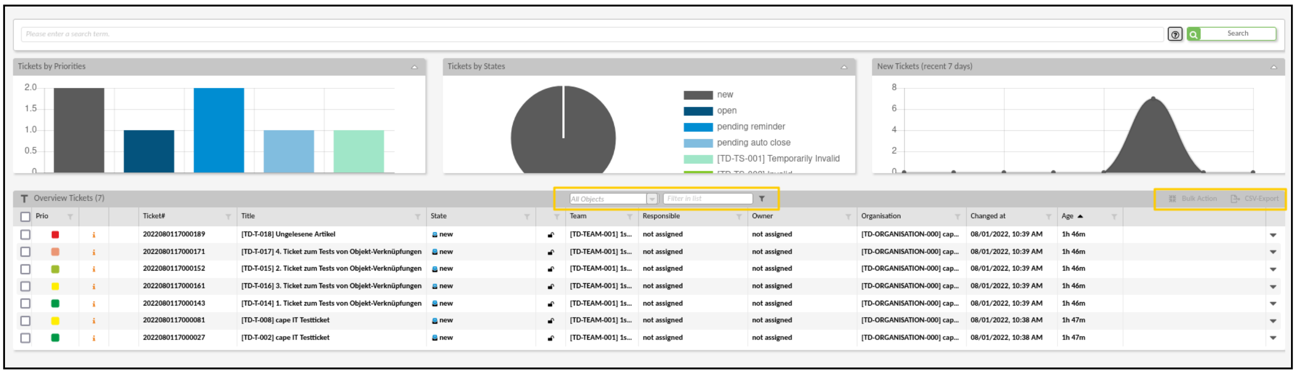


Fig.: Ticket Dashboard Overview with Ticket Table Functions

Right next to the menu bar you will see an overview of all the tickets sorted by team. The numbers in the bracket after the tickets represent: number of open tickets | number of available tickets. By clicking on a team, the corresponding ticket table will open. If required, you can collapse this widget by clicking .

The widgets in the center contain statistical data about the available tickets. They have a standardized configuration and cannot be modified separately. If required, you can collapse the widgets by clicking .

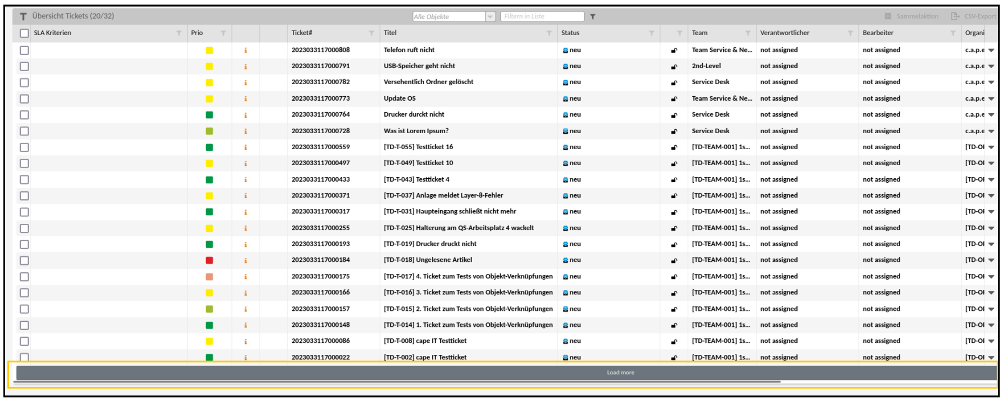
The search function is located above the widgets. The ticket properties are searchable by ticket number, title, a keyword of the article content, "From", "To" and "Cc". The use of wildcards (*) is possible.

9.1 The Ticket Table

The ticket table is located underneath the statistical analysis graphs and displays information about the available tickets. The table header contains various functions:

Function	**Explanation**
All Objects	Filter options: owner, watched tickets, escalated tickets, locked and unlocked tickets, and tickets for which you are responsible.
Filter	Enables you to restrict the results in the table based on a search term. To do this, enter the term and click the filter symbol.

Function	Explanation
Bulk Action	This action becomes active as soon as at least one ticket has been selected from the list. After clicking "Bulk Action", a new window will open, where you: • can select which attribute (e.g. Team) you want to edit and to what (e.g. Service Desk). • if desired, whether the new ticket should be linked (with another ticket, an FAQ or an asset) Then click "Execute now". An overlay will ask you which action you would like to execute. Click "Yes" to confirm the action. If an error somehow slipped through, click "No". Then you can return to editing the "Bulk Action". Tickets that have already been merged cannot be merged again and therefore are not available in the selection.
CSV Export	This action becomes active as soon as at least one ticket has been selected/ checked off in the table. More information on this can be found in the "Function Descriptions" section.
(Filter in each column)	Here you have the option of searching the respective column for a search term. Enter the term and click on the filter symbol.

Function	Explanation
"Load More" Button	 At the bottom of the table you will find the "Load more" button. Clicking on it will display more tickets. When pressing the "Load more" button, a filter set in the table will be reset. You have to enter it again.

If you want to open a specific ticket, click in the line of that ticket.

How to create a new ticket or edit an existing ticket is described in the respective chapters.

9.2 Ticket Zoom View

The ticket zoom view you will find an overview of all ticket-relevant information.

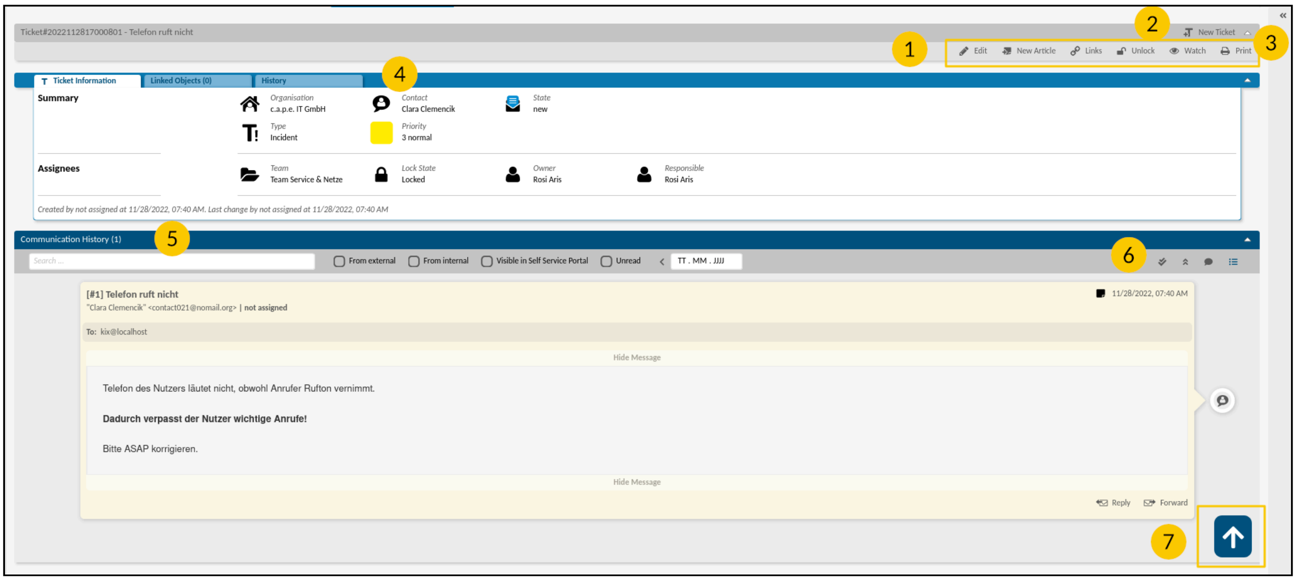


Fig.: Ticket Zoom View Overview

Number	Explanation
1	Here you will find the various processing options for a ticket: • Edit • New Article • Links • Unlock • Watch • Print ⓘ The "Print" action available on the ticket generates a PDF of the ticket including all articles, which is offered for download and printing via the browser functions.
2	Clicking this button allows you to create a new ticket.

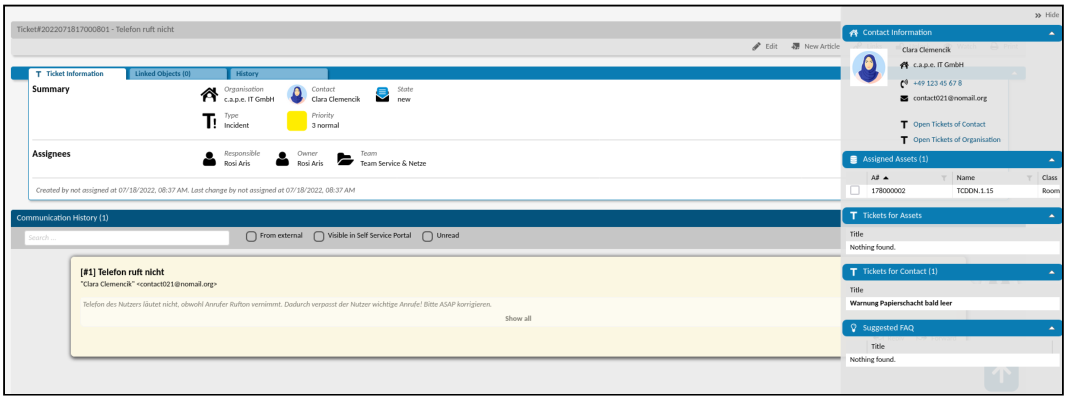
<table>
<tr><th>Number</th><th>Explanation</th></tr>
<tr><td>3</td><td>
The sidebar is initially closed. Click « to open it. There are various widgets in it.


Fig .: Opened sidebar
The "Contact information" widget contains additional information on the organization and contact that are stored for the ticket.
Other widgets are

"Assigned Assets" - This is an overview of all assets associated with this contact.
"Tickets for Assets" - Their content is based on the dynamic field "Affected asset" and shows other tickets that exist for this asset.
"Tickets to Contact" - Here you will find an overview of all tickets linked to this contact.
"Suggested FAQ" - The widget provides relevant FAQs when creating the ticket that can help the user.

All sidebars are hidden by clicking on ».
</td></tr>
</table>

Number	Explanation
4	The first lane contains three tabs. The first tab, "Ticket Information", details all of the basic information about the ticket. The second tab, "Linked Objects", displays all of the ticket links, broken down by link to tickets, assets or FAQs. The respective number in brackets represents the number of links. Clicking the corresponding category opens a table in which all of the links are stored – including ticket number and a brief description. If required, you can also click within the line to access the linked ticket, asset or FAQ. The third tab, "History", contains a list of all the actions performed on the ticket. You can search through these using the filter. This field is initially always expanded.
5	In the second lane you can see the "Communication History", which shows the completely numbered communication, sorted by date. The newest entry is always at the top. Filter functions are also available here: • The search to search the communication by keywords • The checkboxes "from external", "from internal", "visible in the customer portal" and "unread". Select one or more checkboxes by ticking and the communication will be searched and mapped accordingly. • Limit the display of communications/articles using the " › (before) / ‹ (after) + date" filter. This field is initially always expanded.

Number	Explanation
6	The following functions are available for the articles:

	Mark all articles as read. This action is available to you as soon as a message is unread.
	Collapse all items. This action is available to you as soon as a message is expanded.
	Items are displayed in normal view in the form of a preview list.
	Articles are displayed in a compact representation. You will not see any article content preview or article actions.
	The article sorting in the communication history is changed by clicking on it (either oldest entry first or newest entry first).

The form of display you have selected is saved in the personal settings and is available again in subsequent sessions.

The following buttons are available in the article itself:

Hide message / Show all	You can display or hide the article content by clicking on it.
Show all attachments / Hide inline attachments	You can display or hide attachments in the article by clicking on them.

You can use these buttons to reply to emails. Clicking opens a dialog window where you can reply to the article or forward it.

Reply	Click this button to reply to an email.
Forward	Click this button to forward an email.

If an email article you created could not be sent, an error notification is displayed in the toolbar in the "Notifications" button. Clicking on the notification loads the affected ticket and focuses on the relevant article.

<table>
<tr><th>Number</th><th>Explanation</th></tr>
<tr><td></td><td>Furthermore, you can print individual articles as PDFs. Clicking on the print-button generates a PDF of the article, which can be downloaded and printed via the browser functions.<table><tr><td>Print</td><td>Click this button to create a PDF of the corresponding article.</td></tr></table></td></tr>
<tr><td>7</td><td>Scroll button with which you can jump to the "first" article by clicking on it.</td></tr>
</table>

9.3 How to Create and Edit a Ticket

9.3.1 Creating a Ticket

To create a new ticket, click (Ticket +) in the header of the Home Dashboard. A tab then opens:

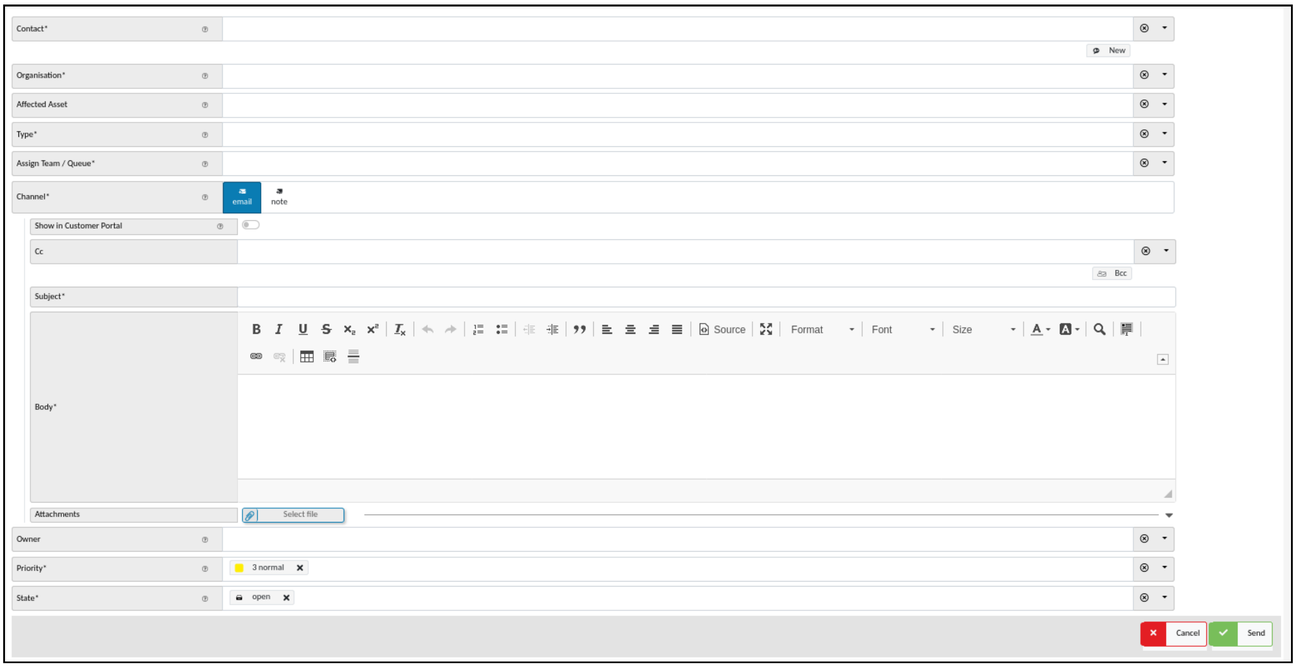


Fig.: "New Ticket" Form

Work through the individual lines step by step. Fields with a "*" are mandatory and must be filled out.
If there is a down arrow to the right of the field to be filled in, a selection menu opens when you click in the field. To apply the selected entries in these selection fields, click on "Apply" or outside the opened selection field to apply the selected entries.

> **Please note**
>
> Your administrator can customize the program's interface and expand it with so-called dynamic fields. If necessary, contact him for additional, new fields.

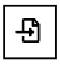
Ticket Template (Optional)	Use the drop down menu to select a template for creating the new ticket. When you click on the respective template, the fields defined in it are displayed or (in the background) filled in. If the field is not available, but you need ready-made ticket templates, please contact your admin.

Contact	Enter the name of the person who is creating the ticket/on whose behalf the ticket is to be created. If you have entered a text in the article form, it will be retained when you change channels if the corresponding field is also available in the new channel. This applies to the dialogs: "New ticket", "Edit ticket", "New article" and "Answer article". Once you have entered at least 3 characters, you will be shown a list of suggested contacts that have already been created in the system. Select the contact you want. Especially when working with large databases and wanting to narrow down the search results or have a more flexible range of results, you can also enter several parts of search terms and connect them logically. To do so, you can use the following special characters: • "&": can be used to combine terms (AND link) • "+": same function as "&" • "|": can be used to separate terms, in order to find everything that "contains either one or the other" (OR link) • "*": wildcard search, to find entries when you only know part of the search term **Examples**: • You search for a Mr Meier. You get lots and lots of results. Using "+" or "&" you can add part of his first name to the search ("Meier+Max") • You want to search for a Mr Meier but don't know how to spellhis surname -> Search for "Meier|Mayer|MAier|Meier" • You only know the first letter of a name ("A") and knowthat it ends in "mann". In that case, search for "A*mann" You can also search contacts by customer number or organization name. This entry can also be linked by special characters, e.g. "KNR + part of the name". **Tip**  You can create a new contact by clicking on the icon if the required contact does not yet exist. If the tab "Create new ticket" is closed in the meantime, there is no return to the ticket creation after saving the new contact.

Organisation	Select which of the organizations associated with the contact to attach the ticket to. Tickets and organisations: In the KIX Agent Portal, tickets do not necessarily have to be assigned to an organisation. Contacts do not necessarily need an organisation either. When using the Self Service Portal (SSP), however, the assignment to an organisation is mandatory.
Affected Asset	Here you can enter any affected units. These will subsequently be linked to the ticket. • You can search by the asset number and/or the asset name. • You can select a maximum of 15 assets.
Type	Enter here what type of request the ticket concerns.
Assign Team	This is where you specify the department that is responsible for the ticket (e.g. Infrastructure, Management, Sales, etc). The teams available for selection depend on the base permissions you have in the system.
Channel	Select whether you would like to store the ticket description internally to the ticket (Note) or want to send it per email (Email), as well.
Show in Customer Portal	Select whether the following ticket/article should be displayed in the Self Service Portal by activating the slider by clicking on it. If the slider is not activated, the system automatically checks in the background whether the ticket contact belongs to the article recipients and sets the visibility accordingly
Subject	The subject is the topic of the request and, after creating the ticket, forms the title of the ticket.
Body	This field contains all relevant information about the request or task. Please describe your concern in as much detail as possible, so that a third party would be able to understand the situation. Similar to other writing tools, you have the option to e.g. format the text in bold or italics, add links, etc.

Attachments	Here you can attach additional files to the ticket. You can do this using Drag & Drop. Please note that the maximum file size is 25 MB per file.
Owner	Select the person who is to be responsible for processing the ticket. You can either find the name in the selection of the drop-down menu of the field. Or enter three letters of the name of the person to be selected and filter the field accordingly.
Priority	Priority levels are color-coded and indicate different levels of urgency (levels 1 - 5) and can be used to categorize tickets. Select the appropriate urgency level/category.
State	The "state" defines the status of a ticket. Select the appropriate state (e.g. new or open).

On the right side of the screen there are several sidebars that provide you with information about the data you have entered.

- Contact information - Here you will find all the information stored for the selected contact (address, telephone number, email address, etc.).
- Assigned Assets - Here you will find all the assets associated with the contact.
- Tickets for Asset - If you select an asset in question, all tickets already available for this asset appear.
- Tickets for Contact - Here you can see which tickets are assigned to the contact you have selected.
- Recommended FAQ - If there is an FAQ for the asset you selected, or for keywords from the subject, it will be displayed here.
  - By clicking the icon  you get a preview of the FAQ entry.
  - You can insert the FAQ directly into the article by clicking on the icon .

Finally, to create the ticket, click "Save".

9.3.2 Editing a Ticket

After opening a ticket, you will see the following view:

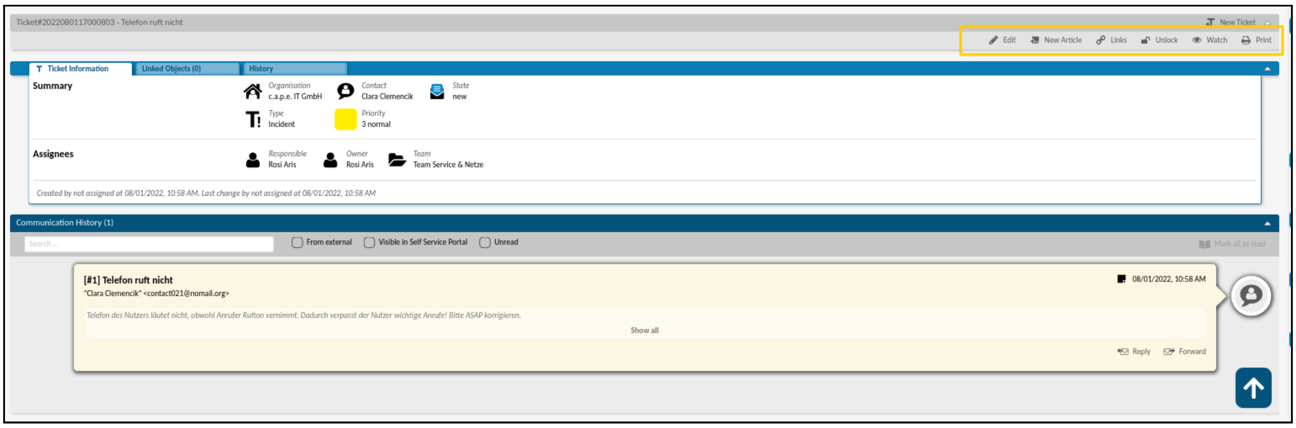


Fig.: Overview of Options for Editing a Ticket

The following table explains the various options available for editing a ticket.

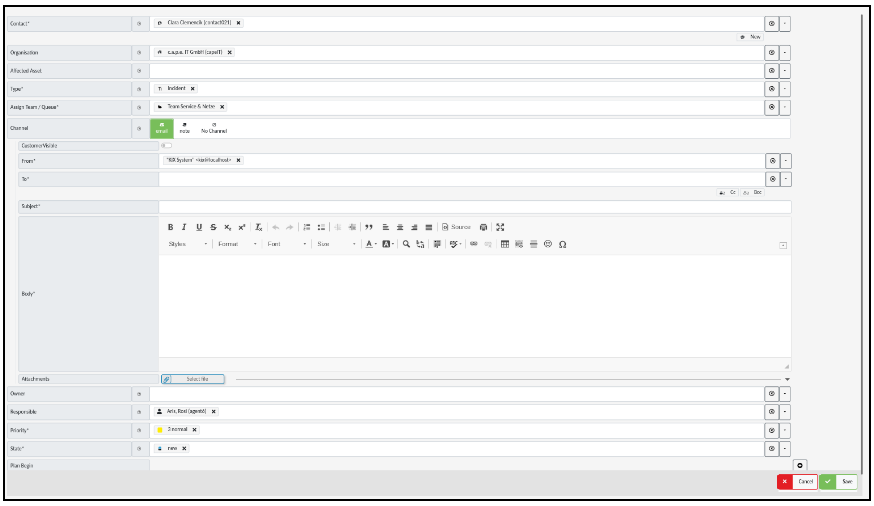
Editing Options	Explanation
New Ticket	Clicking this button allows you to create a new ticket.

<table>
<tr><th>Editing Options</th><th>Explanation</th></tr>
<tr><td>Edit</td><td>

The "Edit" button is available when

- the ticket is **not** blocked or
- the ticket is blocked and you are the processor or
- the ticket is blocked and you are the person responsible.

Clicking this button opens a new window containing all of the information about the ticket.



Here you can make changes, similar to in the "Create Ticket" process.

> The edit dialog does not automatically fill in the "Editor" and "Responsible" fields for tickets that are not locked. They will appear blank or Unassigned.
If necessary, your admin can activate the following function: When changing teams, the editor is reset to "not assigned" so that the wrong editor is not set in the new team. If the team is changed and the editor is updated at the same time, the set editor is retained.

You can also add a start date and an end date for the processing period. By selecting in this way, you can view the ticket in your personal calendar. Clicking "Save" ends the process and saves the changes you made.

There are also expandable and collapsible sidebars containing the organisation and contact information, as well as other text modules.

</td></tr>
</table>

<table>
<tr><th>Editing Options</th><th>Explanation</th></tr>
<tr><td>New Article</td><td>Clicking this button opens a new tab in which you can create a new article:

First select the channel via which you wish to send the reply: "Email" (external message), "Note" (internal message) or "No Channel".
Select whether the following article should be displayed in the Self Service Portal by activating the slider.
If you select "Note", enter the following:

The subject of the note
Your text in the main body of the article
Attachments can be added via the corresponding field

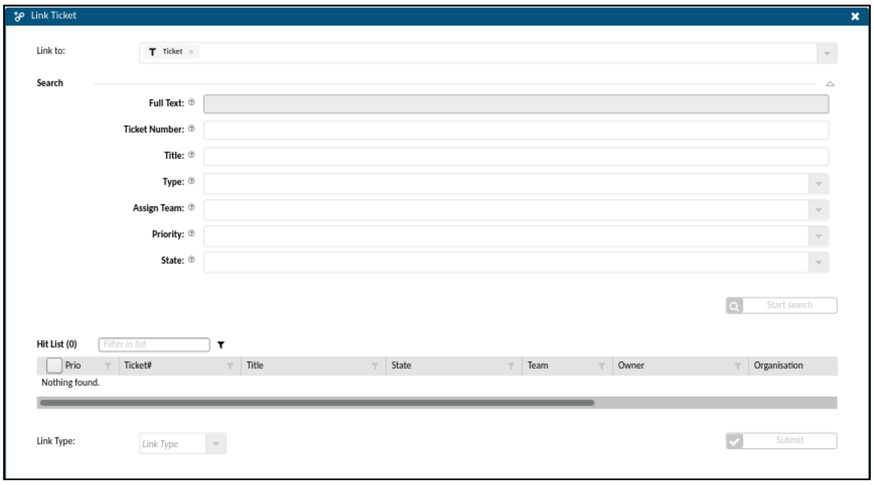
Once all of the relevant information has been added, click "Save". This saves the note to the ticket and the employee specified as the owner will automatically receive an email.
If you select "Email", enter the following:

From ... whom the email is being sent (prepopulated by the system).
To ... whom the email is to be sent.

By clicking the arrow at the end of the field, you can add additional recipients. This opens a search box where you enter the name (at least three letters) of the recipient, click and select the relevant contact (already saved in the system), and then click "Submit".
Within the same field, you can click the CC or BCC buttons to select whether to CC (carbon copy = all recipients can see the contact details) or BCC (blind carbon copy = the various recipients won't see any contact details) anyone on the email.

The subject of your email
The text of your email in the body of the article
Attachments can be added via the corresponding field

Once all of the relevant fields have been completed, click "Send". Internally, the email will be saved to the ticket, externally, it will be sent to the recipients specified.
</td></tr>
</table>

Editing Options	**Explanation**
Links	Clicking this button opens a new tab containing a list of all the existing links. You can use the filter function to search through this list. If you want to delete an existing link, select the element from the table and click the "Delete link" button. If you want to create a new link, click "Assign link". This opens a new window:  • First select the element to which you want to link the ticket: another ticket, an FAQ or an asset. • Fill in the fields with any information you know about the element that you are searching for. • Please note: you don't have to fill in all of the fields. • Then click "Start search". • The result list will show all of the relevant results. • Select the element you want by checking off the empty box in front of it. A check mark will be visible in the field. • When clicking within the line, the element will be opened in a separate browser tab. • Next, select the type of link. After doing so, the "Submit" button will be activated. • Finally, click "Submit". The link is now established.

Editing Options	Explanation
Unlock	Unlock: Releases the ticket for other agents to process. This ticket action only appears if the ticket is locked. Lock: blocks the ticket for other agents. The ticket can only be processed by the processor and the person responsible.
Watch	Click here if you wish to be informed about all of the processes relating to the ticket.
Print	Click here to print the ticket.

If you have entered a text in the article form, it will be retained when you change channels if the corresponding field is also available in the new channel.
This applies to the dialogs: "New ticket", "Edit ticket", "New article" and "Answer article".

Reply and forward function

Editing Options	Explanation
Forward	You can forward a note or email by clicking this button.
Reply	You can reply to a note or email by clicking this button.

If you click on one of the two editing options, a new tab opens.

The following are preselected:

Channel	Depending on the original channel
Show in Customer Portal	The slider is activated.
From	Sender of the calling article (your email address)
Subject	Original subject is quoted: FW (forwarding), RE (reply)
Article description	The original content is quoted.
Attachments	If there are attachments to the original content, they will be "taken along" when forwarding or replying. If necessary, they can be removed by clicking the "X".

10 Asset Dashboard

The asset database is a database developed for accessing and managing assets (configuration items). All equipment involved in the business processes, e.g. computers, software, servers, phones, machines, vehicles, rooms or buildings.

The Explorer is located right next to the menu bar, in which all devices are listed according to individual categories. With » you can open this widget. The numbers in brackets indicate the number of assets included in that category. Only by clicking on a category does the associated asset table open.

If you have selected an asset class in Explorer and click on the "Asset +" button to create a new asset, the Asset class field is preselected accordingly in the form that opens.

The search function is located above the widgets. The asset properties can be searched for "Name" and "A#". Wildcards (*) can be used.

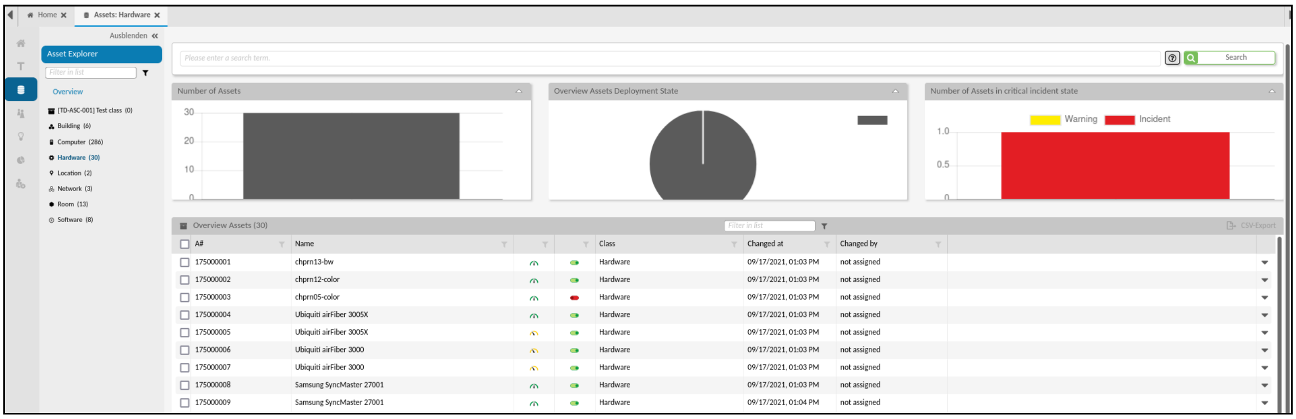


Fig.: Asset Dashboard Overview

The widgets in the center contain statistical data about the assets in the database. They have a standardized configuration and cannot be modified separately.

You can collapse the widgets if required by clicking .

10.1 The Asset Table

The asset table is located underneath the statistical analysis graphs and displays information about the available assets. The table header contains various functions:

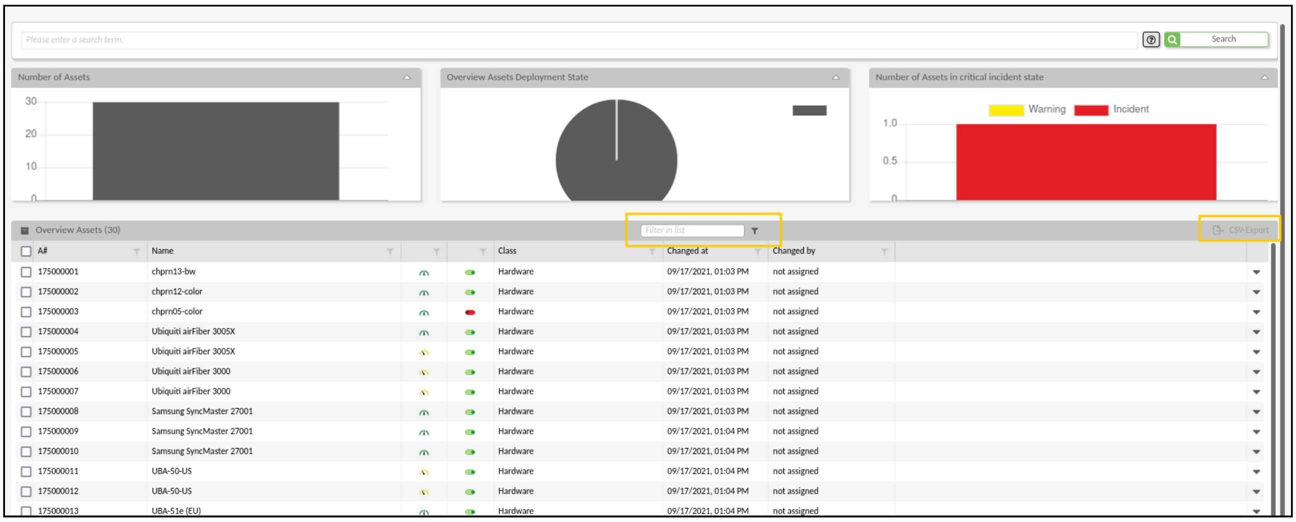


Fig.: Asset Table Functions

Function	**Explanation**
Filter	Enables you to search though the table based on a search term. To do this, enter the term and click the filter symbol.
Bulk Action	The action becomes active as soon as at least one asset is selected in the list. After clicking on "Collective Action" a separate window will open. Choose here: • which attribute (e.g. description) should be changed and how (e.g. change to "instruction"). • if desired, whether the new ticket should be linked (to another ticket, an FAQ or an asset) Then click the "Run now" button. An overlay lets you know what action you want to take. Click "Yes" to confirm the action. If an error has crept in, click on "No". You can then edit the bulk action again.

Function	Explanation
CSV Export	This action becomes active as soon as at least one asset has been selected/checked off in the table. More information on this can be found in the "Function Descriptions" section.
(Filter in each column)	Here you have the option of searching the respective column for a search term. Enter the term and click on the filter symbol.

10.2 Asset Zoom View

The asset zoom view contains all of the tickets within the selected category of the operating resource. Here you can also execute asset-related actions.

After opening an asset, you will see the following view:

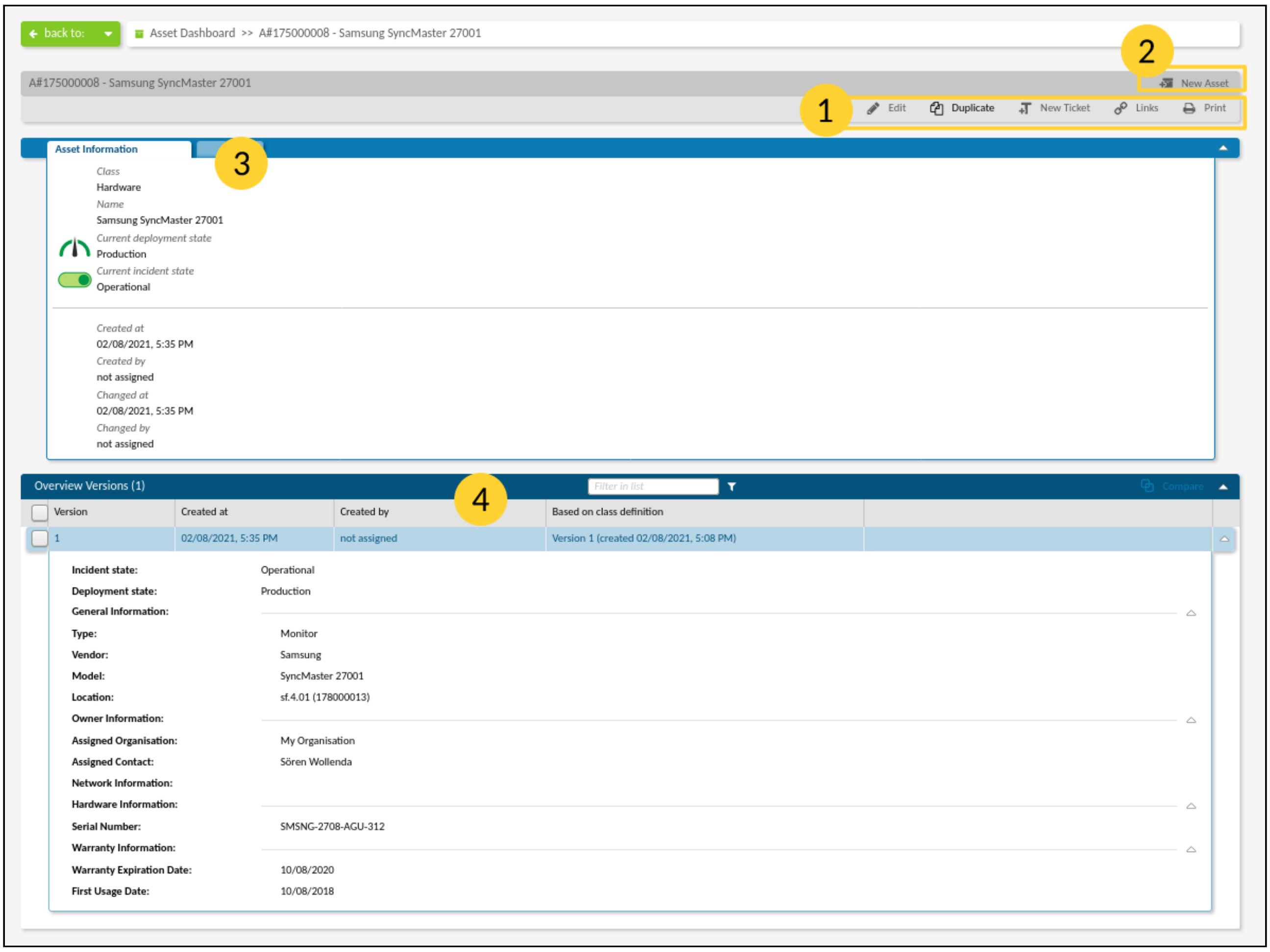


Fig.: Asset Zoom View Overview

1	This area indicates the various options available for editing an asset: • Edit • Duplicate • New ticket • Links • Print Asset • By clicking the button, the complete asset including all versions is printed out.
2	Clicking this button allows you to create a new asset.
3	The first lane contains three tabs. The first tab, "Asset Information", details all of the basic information about the asset. The second tab, "Linked Objects", displays all of the asset links, broken down by link to tickets, assets or FAQs. The respective number in brackets represents the number of links. Clicking the corresponding category opens a table in which all of the links are stored – including ticket number and a brief description. If required, you can also click within the line to access the linked ticket, asset or FAQ. The third tab, "History", contains a list of all work performed on the asset. You can search through this using the filter. This lane is initially always expanded.

4	The second lane, "Overview Versions", contains all of the versions of the asset. Organisations or contacts listed in the asset view are clickable. You can jump directly to their zoom views. This lane also has a filter function for you to search through the messages by keywords. You can also compare the different versions of the asset by clicking **Version comparison**: Place a in front of every asset version that you want to compare. Click the "Compare" button. This opens a new tab in which the versions are compared in a table. Changing the incident status via the GUI does **not** create a new version. Only when another versioning attribute (e.g. serial number) is changed does KIX create a new version. With "Print Selection" you have the possibility to print selected version(s). This button only becomes active when at least one version has been selected. This lane is initially always expanded.

10.3 How to Create and Edit an Asset (Config Item)

10.3.1 Creating a New Asset (Config Item)

To create a new asset, click "+NEW" in the header of the Home Dashboard. This opens a new window. Click the "New Asset" tab.

First, select an asset class from the list. The rest of the input fields will subsequently load.

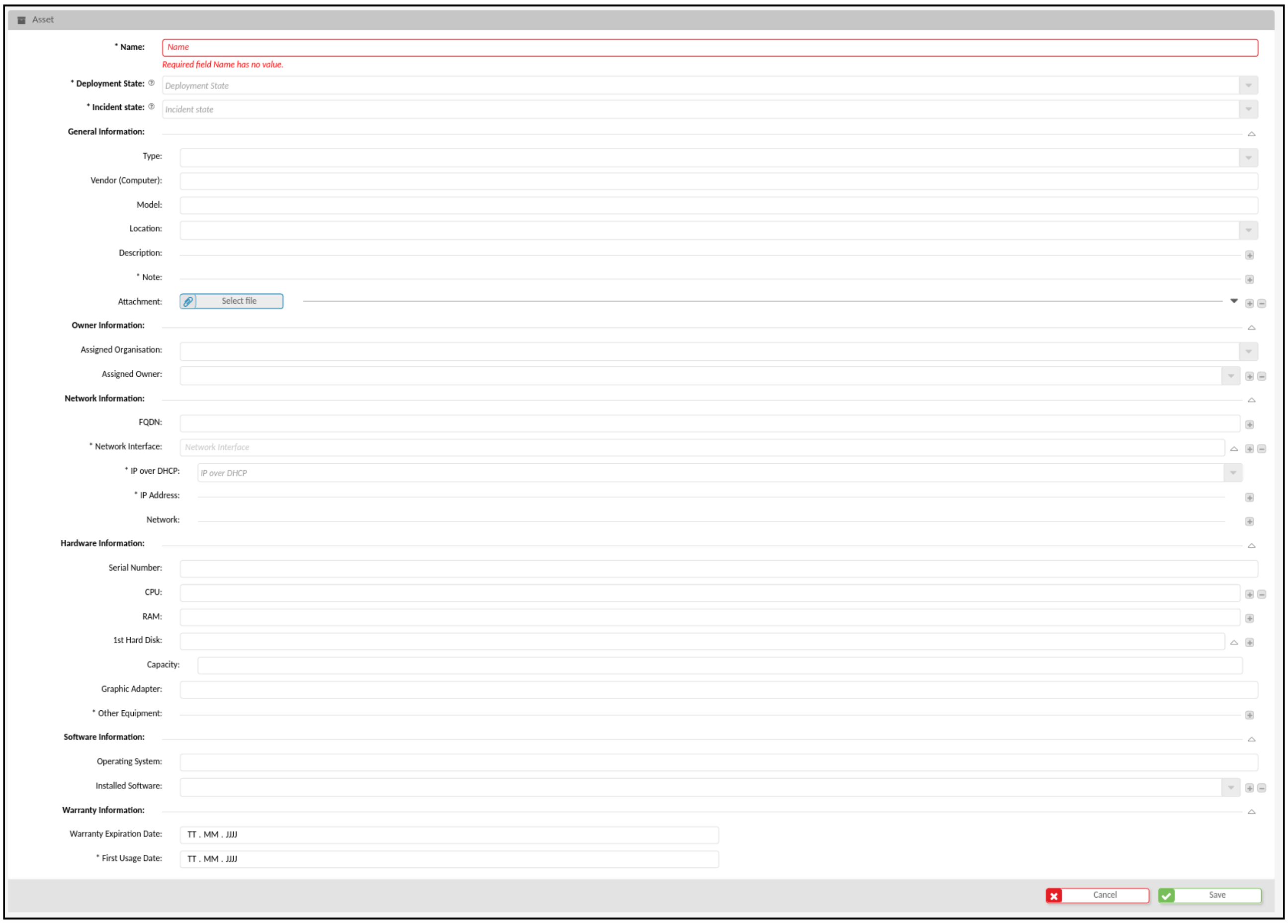


Fig.: "New Asset" Form

Only fields marked with * are mandatory. All other fields offer the option to enter device-related information, as far as these are available and necessary.

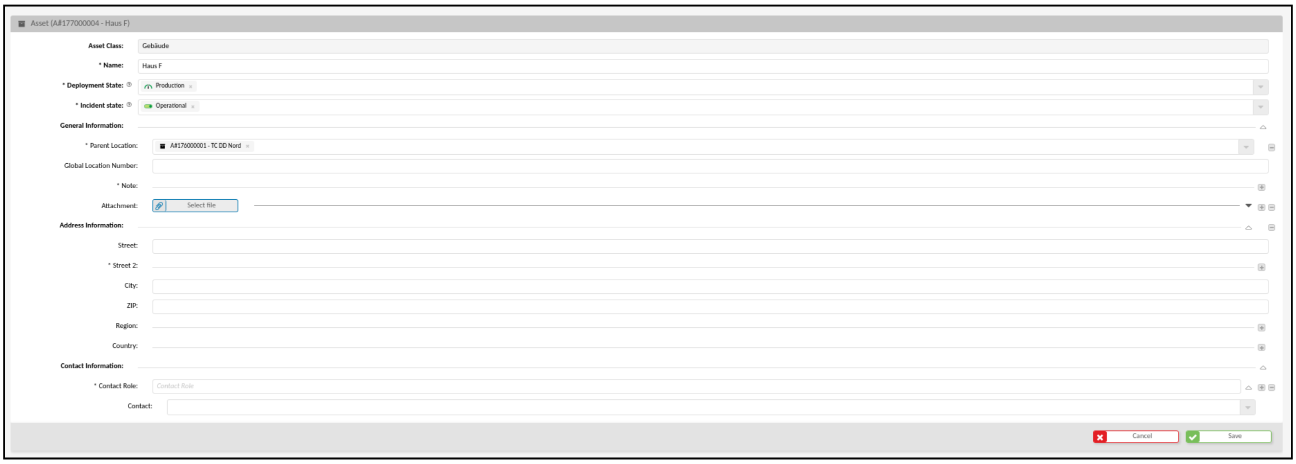
Work through each line one by one. If there is a downwards-pointing arrow next to any given field, a selection menu will open when you click the respective field. To apply the selected entries in these selection fields, click on "Apply" or outside the opened selection field to apply the selected entries.

Name	Enter the name/designation of the asset.
Deployment State	Select the deployment state for your asset. It specifies the position of the asset within its life cycle. If you set an asset to the usage status "Inactive" or "Retired", this asset switches to post-production operation. As a consequence, it no longer appears in any overview or list. This asset can only be found via the complex search.
Incident State	Select the incident state for your asset. It specifies the current state of your asset.
General information block	Here you can enter all device-specific data. It is possible to upload attachments.
Owner information block	If necessary, assign the associated organization or contact to the asset
License information block	Enter the license type and the license key of the asset.
Note	Enter a description or other relevant data of the asset in the text field.
Attachment	Here you can attach additional files to the asset. Insertion via drag & drop is possible.

Click "Save" to create the new asset.

Depending on the assigned asset class, additional blocks and fields can be displayed.

Example "asset class building"



Name	Enter the name / description of the building.
Deployment State	Select the usage status of your building.
Incident State	Select the incident status of your building.
General Information block	Here you can enter all building-specific data. It is possible to upload attachments.
Address Information block	Enter the address of the building.
Contact Information block	Enter the contact information for the building. • Contact role: Enter the role that is appropriate for the assigned contact (e.g. caretaker, site manager, etc.) • Contact: If necessary, provide the specific contact.

10.3.2 Editing a Saved Asset (Config Item)

After opening an asset, you will see the following view:

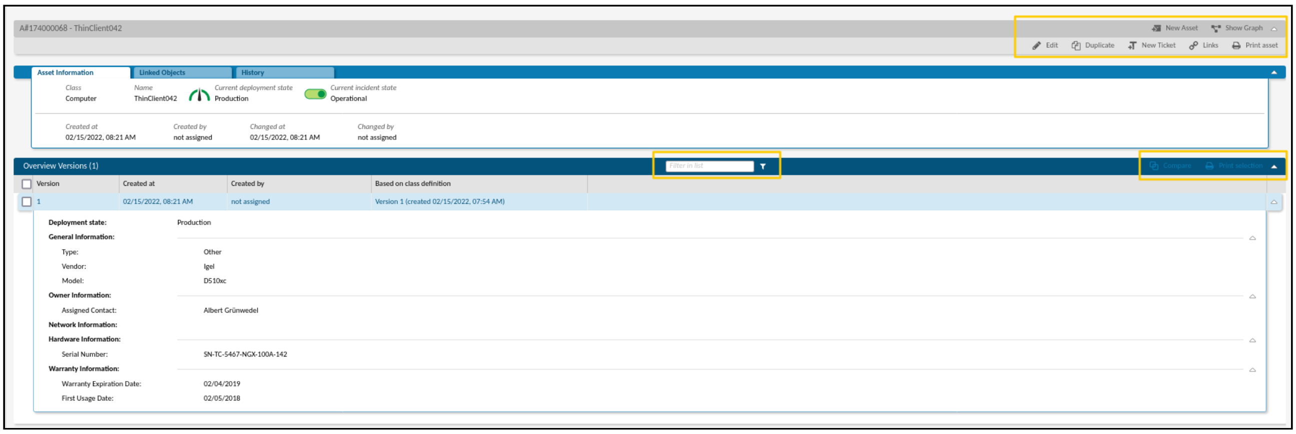
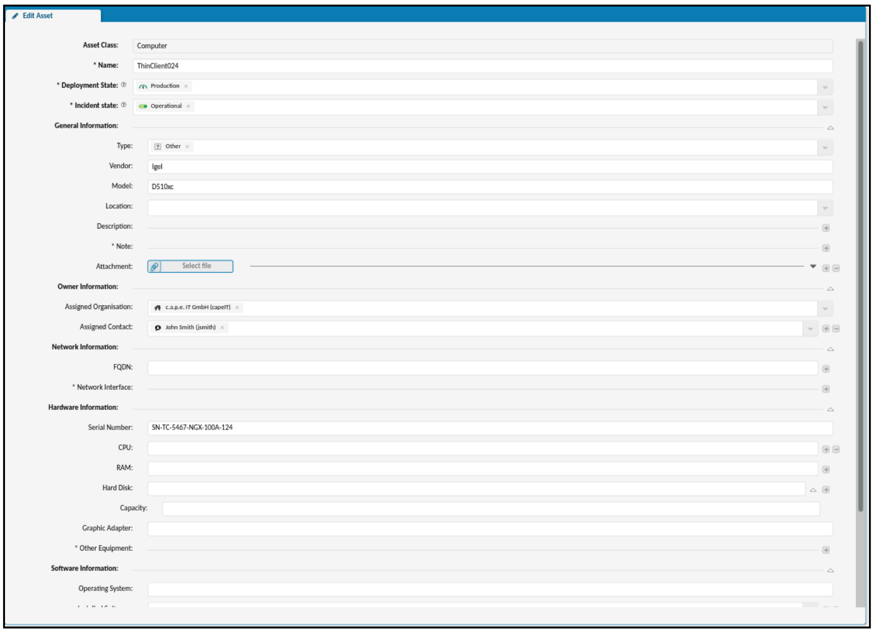
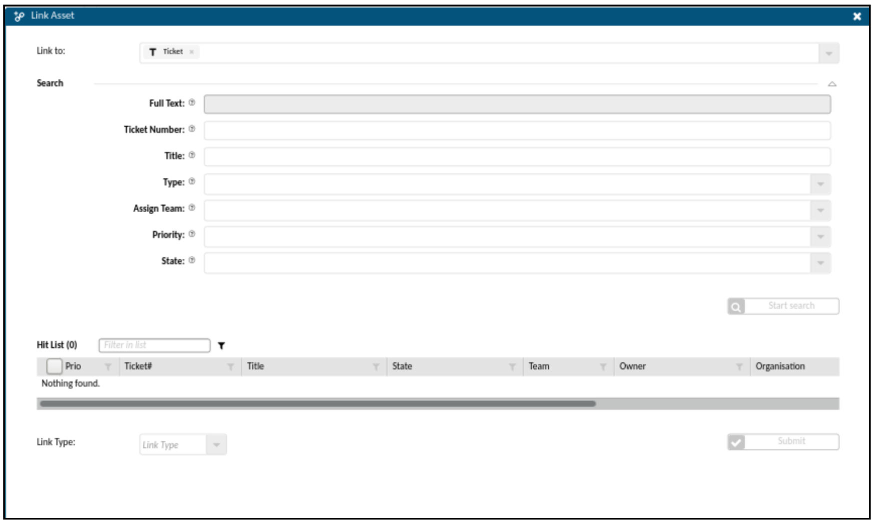


Fig.: Overview of Options for Editing an Asset

The following table explains the various options available for editing a ticket.

Editing Options	**Explanation**
New Asset	Clicking this button allows you to create a new asset.
Show Graph	By clicking the button you can visualize the relationships of an asset to other assets in a graph.

Editing Options	Explanation
Edit	Clicking this button opens a new window where you can see all of the saved data for the asset.  Edit and change the details in the same way as when creating a new asset using the "+NEW" button. When you have finished, click "Save" at the end. This applies the changes.
Duplicate	Clicking this button allows you to duplicate an asset.
New Ticket	Clicking this button opens a new window in which you can create a new ticket. The procedure is the same as when creating a new ticket by clicking the "+NEW" button.

<table>
<tr><th>Editing Options</th><th>Explanation</th></tr>
<tr><td>Links</td><td>
Clicking this button opens a new window containing a list of all the existing links. You can use the filter function to search through this list.
To delete an existing link, select the element from the table and click the "Delete link" button.
If you want to create a new link, click "Assign link". This opens a new window:


First select the element to which you want to link the ticket: another ticket, an FAQ or an asset.
Fill in the fields with any information you know about the element that you are searching for.
Please note: you don't have to fill in all of the fields.
Then click "Start search".
The result list will show all of the relevant results.
Select the element you want by checking off the empty box in front of it. A check mark will be visible in the field.
When you click in the line, the element is opened in a separate tab.
Next, select the type of link (normal, parent or child).
⚠️ Only then will the Apply button be activated.
Finally click on "Apply". The link has been created.

</td></tr>
<tr><td>Print asset</td><td>By clicking on this button you can print out the data on the asset.</td></tr>
</table>

Editing Options	Explanation
Filter	Enables you to restrict the results in the table based on a search term. To do this, enter the term and click the filter symbol.
Compare	Place a in front of every asset version that you want to compare. Click the "Compare" button. This opens a new window in which the versions are compared in a table.
Print selection	Clicking this button allows you to print the data for comparing asset versions.

10.3.3 Asset "Service" for use in module Maintenance Plan

To create a new maintenance plan in the "Maintenance Plan" module, you need services. You can obtain these by creating an asset in the asset class "Service" with the type "Maintenance (periodic)".

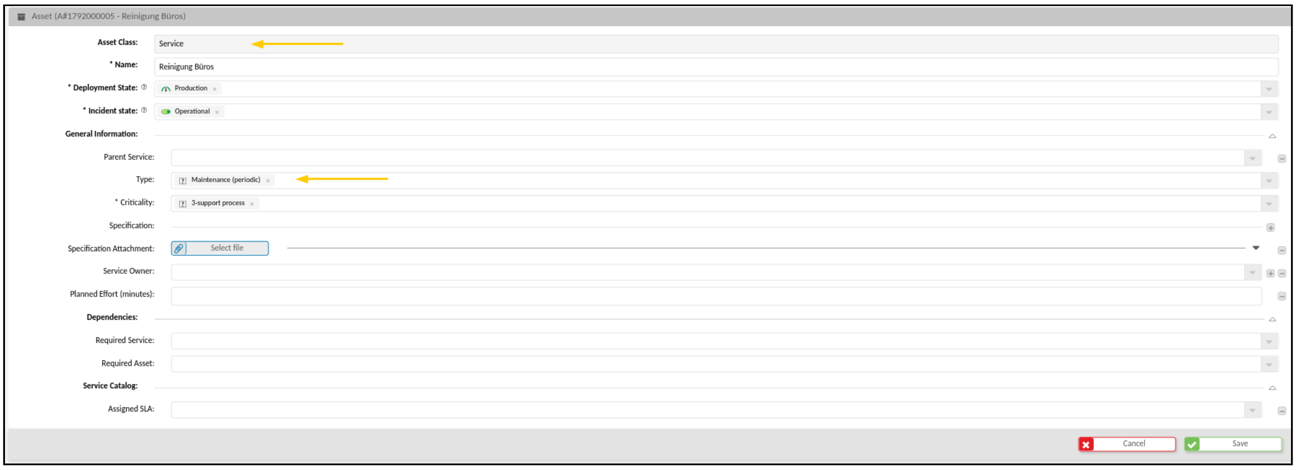


Fig.: Example of asset "Service" for use in the additional module Maintenance Plan

If you add "Affected Services" to a ticket of the "Service" class, a link is automatically created between the ticket and the service asset. This link can be seen in the asset detail view in the "Linked Objects" tab.

10.4 Visualize assets: the link graph

You can visualize the relationships between an asset and other assets in a graph. This visualization helps you to recognize both dependencies between the assets and the relevance of assets. To do this, you need at least rights to read and edit assets. If necessary, contact your system administrator.

To view the graph, click the "Show Graph" button. The graph will open in a new tab.

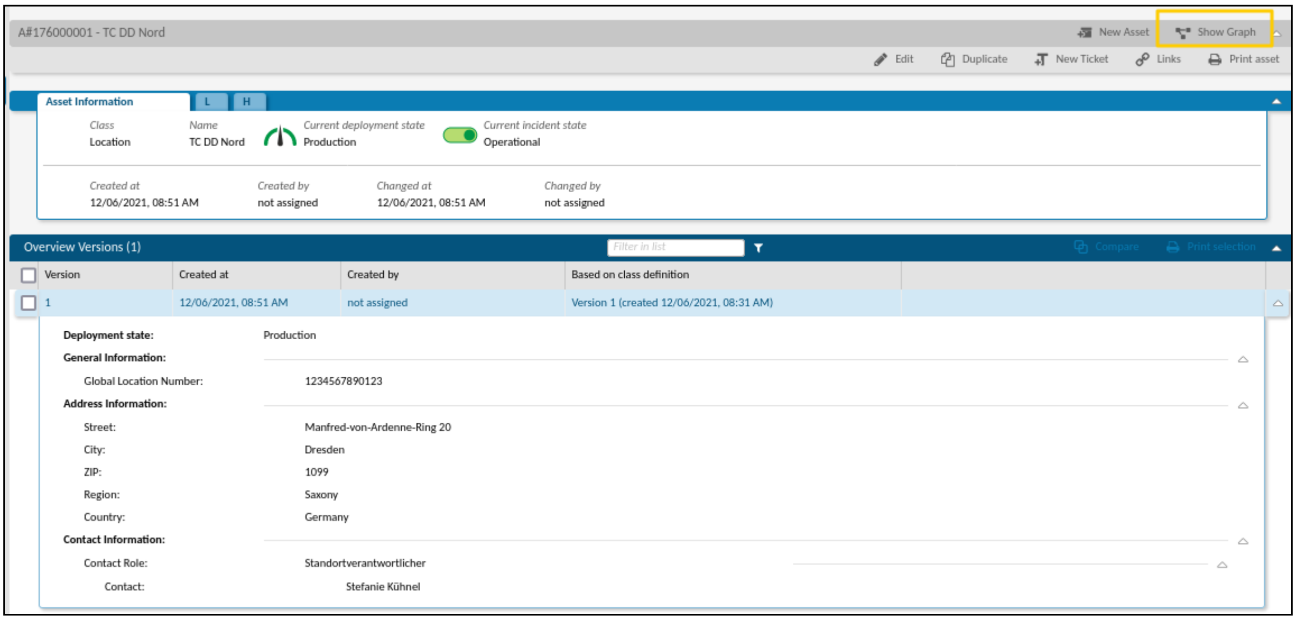


Fig.: Asset with "Show graph" button

The graph visualises the relationships of the selected asset to the assets linked to it, including the link type. Each asset is shown as an icon. You can move the position of the icons by holding down the left mouse button, in order to obtain a little more overview, especially in extensive representations. A click on an icon opens an overlay with the asset details including a direct link to the asset.

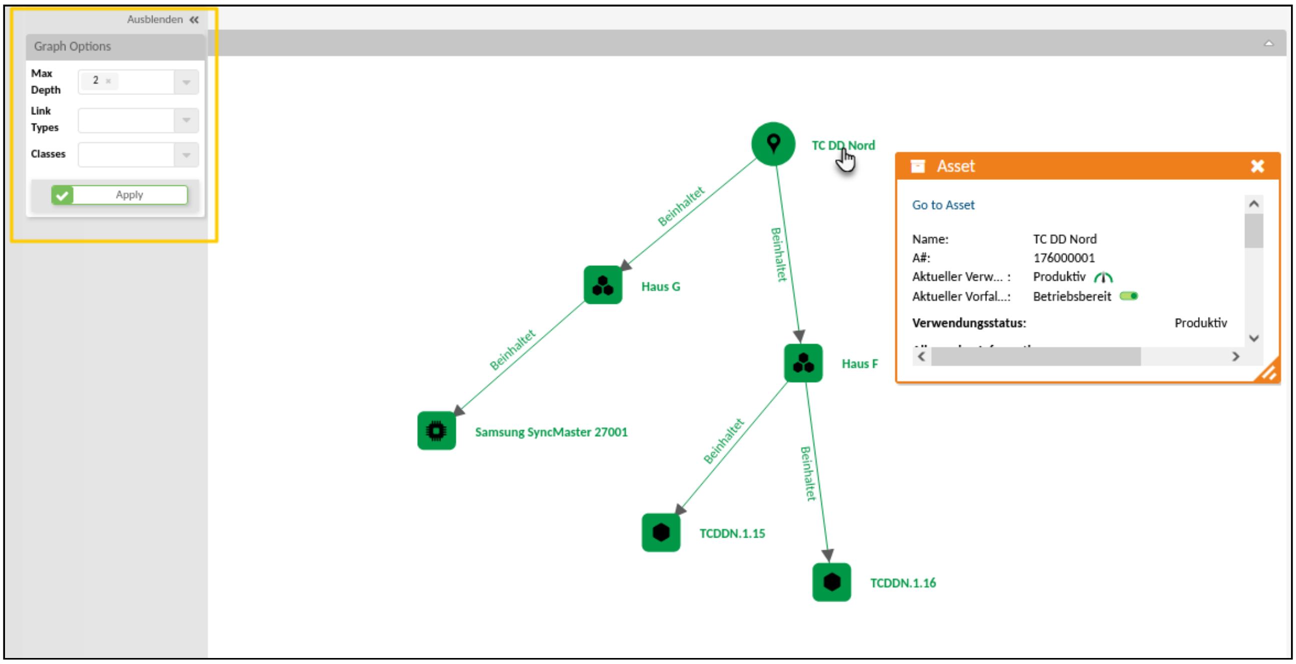


Fig.: Show link graph with setting options

You can filter the representation using the graph options. The filters always relate to the asset whose detailed view was used to open the graph.

- Maximum depth:
    - Defines the maximum link depth - based on the selected asset - that is to be displayed (max. 3 levels)
- Link type:
    - Selection of the link type (e.g. "Relevant for").
    - This allows you to restrict the graph to the linkage types selected here.
- Classes:
    - Selection of asset classes (e.g. "Location" and "Computer")
    - This allows you to restrict the graph to the selected asset classes.
    - Alternatively, you can "Select all (asset classes)" by ticking the box.

If necessary, you can forward the simulation - as it is currently configured. To do this, copy the URL of the configured simulation and forward it, e.g. by email.

To close the graph, close the tab.

10.5 Practical examples of assets

10.5.1 Affected Asset field

Link an incident to an asset:

There is a fault on a device (asset). The affected device is included in the "Computer" class. You create a ticket of the type "Incident" and select the affected device in the "Affected asset" field. In this way, the ticket is linked to the device and the incident status of the device changes from “Operational” to “Incident”.

Evaluate incident:

In order to carry out targeted problem analyzes and evaluations for the process, additional fields (so-called dynamic fields) can be integrated into the program interface by your admin. On the basis of these, the values set on the device concerned (asset) can be automatically copied to the ticket and used for reporting or workflow control.

- Example service with a time specification:
  For example, an affected service can be stored in a field. If a working time specification for the elimination of the malfunction is specified for this service, this time specification can be entered on the ticket as an orientation or default value. The default time can then be compared with the time recording.

- Example service with transfer price:
  The requested service is stored in a service request ticket. A transfer price is stored for this service, which is entered directly on the ticket.

11 Organisations Dashboard

The Organsiations Dashboard contains two widget tables, which are initially displayed empty. Use the search field to search for organisations and contacts.

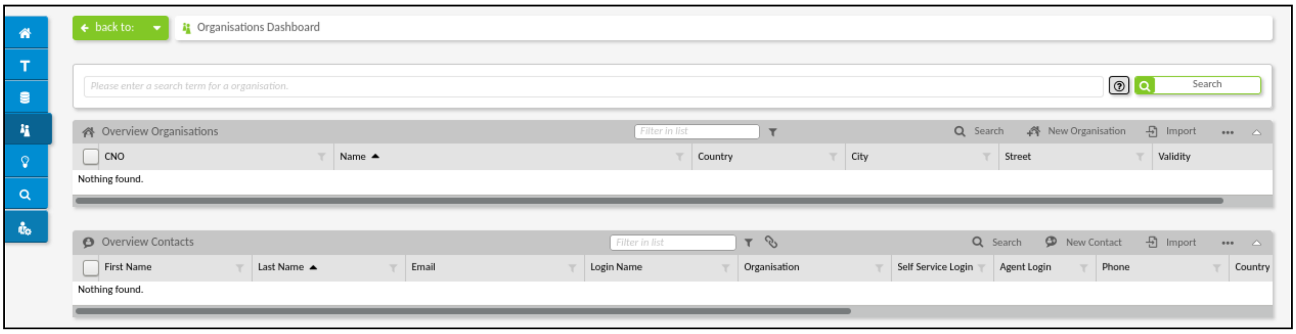


Fig.: Organsiations Dashboard

> **Please note**
>
> To search for contacts, you can use the following special characters:
>
> - "&": this can be used to combine terms (AND link), e.g. searching for "John+Doe" searches for "John" and "Doe" and will find the contact John Doe
> - "+": same function as "&"
>   - + in search for telephone numbers: By manually entering the telephone number, e.g. "+49123456789", a contact can be searched for and found. Combination searches (e.g. "+49123 & Joe") are only possible if your admin has configured the system accordingly. If in doubt, contact him.
> - "|": this can be used to separate search terms, in order to find everything that "contains either one or the other" (OR link), e.g. searching for "Hark|Potts" searches for "Hark" OR "Potts" and finds the contacts "Bill Potts" and "Jack Harkness"
> - "*": unknown parts can be replaced by wildcards (*) in any position of the search phrase, e.g. searching for "J*Yves" shows the contact "Jacque-Yves Cousteau"

11.1 The Organisation/Contact Table

The respective table header contains various functions

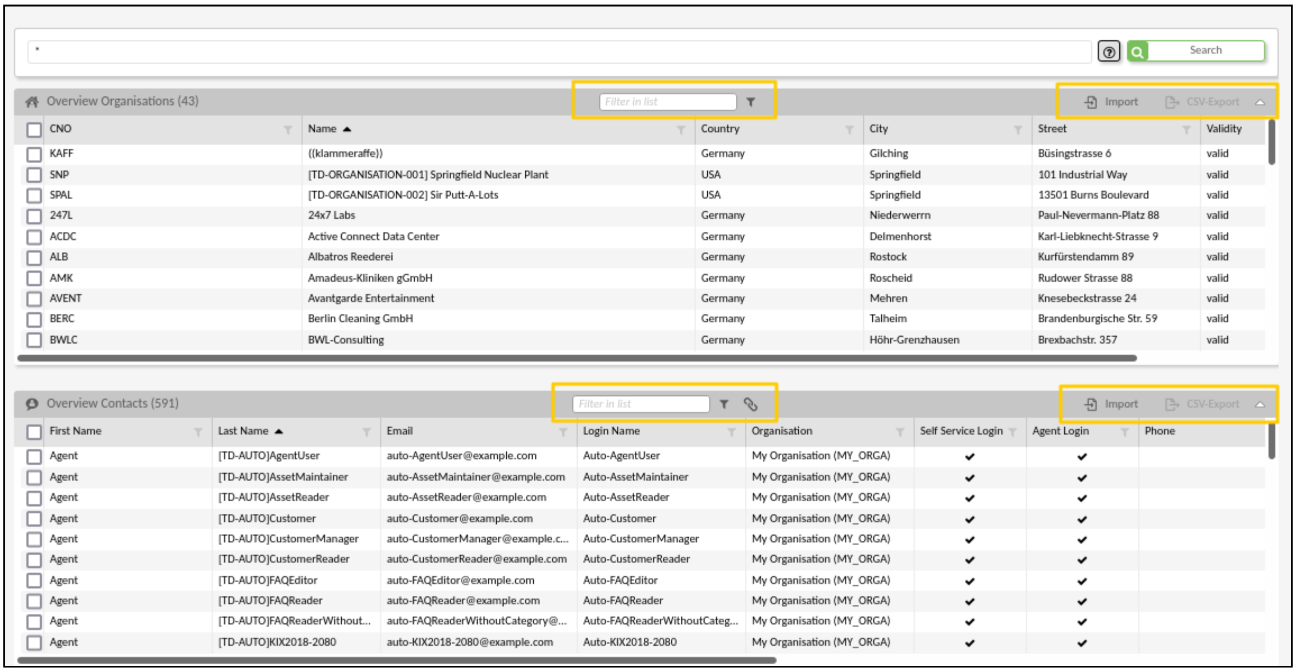


Fig.: Organisation Table with Dependent Contact Table

Filter	Enables you to search though the table based on a search term. To do this, enter the term and click the filter symbol.
/	Remove dependency of contact table/make contact table dependent on organisation table.
Import	Clicking this function opens the form for importing data. More information on this can be found in the "Function Descriptions" section.
CSV Export	Exports the selected contacts/organisations to a CSV file. This action becomes active as soon as at least one contact/organisation has been selected from the table. More information on this can be found in the "General function descriptions" section.
(Filter in each column)	Here you have the option of searching the respective column for a search term. Enter the term and click on the filter symbol.

Notes for CSV import and export

The exported CSV file contains the following attributes (columns):

- Export of organizations: attribute "Number" (the attribute "Name" is not unique).
- Export of contacts: attribute "EMail".

The values in these attributes form the basis for a correct assignment of the data records during (re-)import. Therefore, before importing, make sure that these values only exist once in the CSV file. If the number or email address does not yet exist in KIX, these data records will be created again. If they already exist in KIX, you can specify in the import dialog how this data is to be processed (see sections "Import" and "CSV export" under General function descriptions (see page 11)).

If you want to open a certain organisation entry or a contact, click the line in the table.

How to create a new organisation or a new contact, and then how to edit this entry, can be found in the chapters "How to Create an Organisation and Edit this Entry" and "How to Create a New Contact and Edit Existing Contacts".

11.2 Displaying Assigned Contacts

The symbol in the header of the table "Overview Contacts" creates a dependency between the two table widgets and, initially, is deactivated. Activate the dependency to automatically be shown contacts that are assigned to selected organisations.

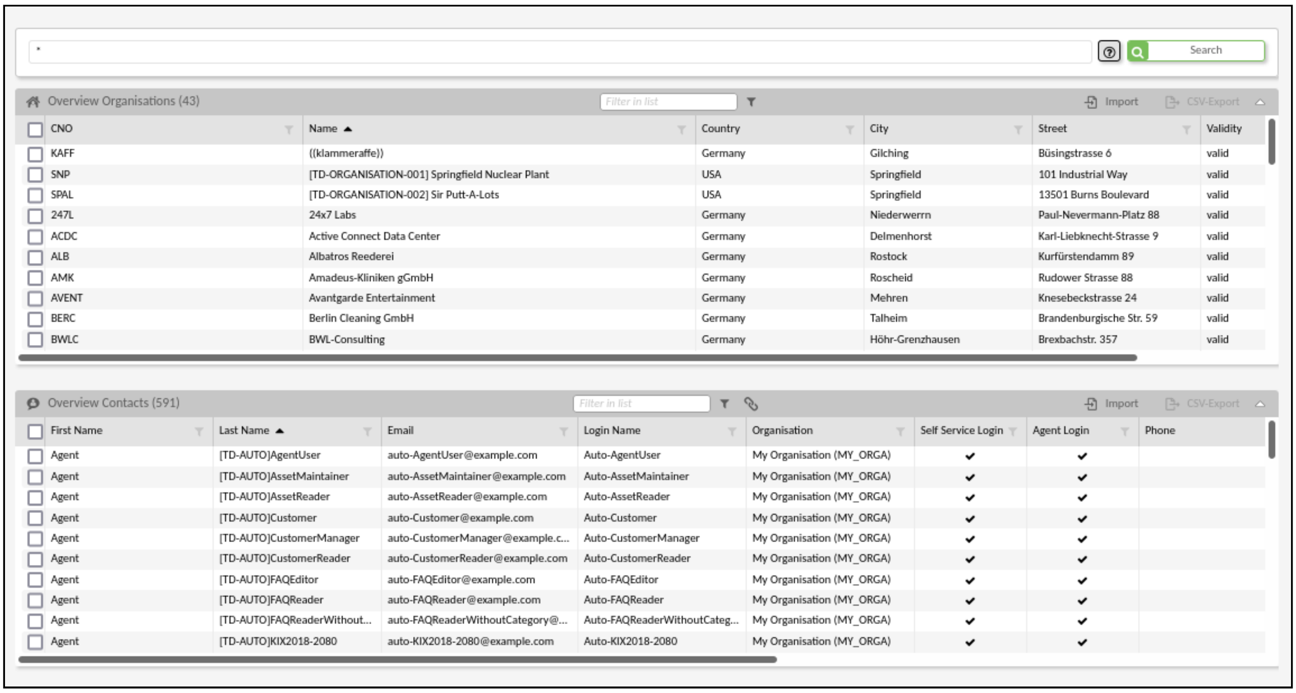
If you apply a filter in the "Overview Organisations" table, the contacts table will update accordingly. This displays the contacts that are assigned to the corresponding organisations. It is possible to apply several selection criteria. Even if all of the filters in the "Overview Organisations" table are deleted, the "Assigned Contacts" table will still show the pre-selected contacts.

This dependency won't be removed until you click the button again.

If the dependency between the two tables is active, the search in the header only takes organisations into account. Only contacts assigned to the organisations found will be displayed in the contacts table. If the dependency has been removed, the search takes both tables into consideration and will show search results for both.

11.3 Organisation/Contact Zoom View

In the organisation/contact zoom view, you will find all of the organisations saved in the system, along with their corresponding contacts. Here you can also execute organisation and contact-based actions.



CNO	Name	Country	City	Street	Validity
KAFF	((klammeraffe))	Germany	Gilching	Büsingstrasse 6	valid
SNP	[TD-ORGANISATION-001] Springfield Nuclear Plant	USA	Springfield	101 Industrial Way	valid
SPAL	[TD-ORGANISATION-002] Sir Putt-A-Lots	USA	Springfield	13501 Burns Boulevard	valid
247L	24x7 Labs	Germany	Niederwerrn	Paul-Nevermann-Platz 88	valid
ACDC	Active Connect Data Center	Germany	Delmenhorst	Karl-Liebknecht-Strasse 9	valid
ALB	Albatros Reederei	Germany	Rostock	Kurfürstendamm 89	valid
AMK	Amadeus-Kliniken gGmbH	Germany	Roscheid	Rudower Strasse 88	valid
AVENT	Avantgarde Entertainment	Germany	Mehren	Knesebeckstrasse 24	valid
BERC	Berlin Cleaning GmbH	Germany	Talheim	Brandenburgische Str. 59	valid
BWLC	BWL-Consulting	Germany	Höhr-Grenzhausen	Brexbachstr. 357	valid

First Name	Last Name	Email	Login Name	Organisation	Self Service Login	Agent Login	Phone
Agent	[TD-AUTO]AgentUser	auto-AgentUser@example.com	Auto-AgentUser	My Organisation (MY_ORGA)	✔	✔	
Agent	[TD-AUTO]AssetMaintainer	auto-AssetMaintainer@example.com	Auto-AssetMaintainer	My Organisation (MY_ORGA)	✔	✔	
Agent	[TD-AUTO]AssetReader	auto-AssetReader@example.com	Auto-AssetReader	My Organisation (MY_ORGA)	✔	✔	
Agent	[TD-AUTO]Customer	auto-Customer@example.com	Auto-Customer	My Organisation (MY_ORGA)	✔	✔	
Agent	[TD-AUTO]CustomerManager	auto-CustomerManager@example.c...	Auto-CustomerManager	My Organisation (MY_ORGA)	✔	✔	
Agent	[TD-AUTO]CustomerReader	auto-CustomerReader@example.com	Auto-CustomerReader	My Organisation (MY_ORGA)	✔	✔	
Agent	[TD-AUTO]FAQEditor	auto-FAQEditor@example.com	Auto-FAQEditor	My Organisation (MY_ORGA)	✔	✔	
Agent	[TD-AUTO]FAQReader	auto-FAQReader@example.com	Auto-FAQReader	My Organisation (MY_ORGA)	✔	✔	
Agent	[TD-AUTO]FAQReaderWithout...	auto-FAQReaderWithoutCategory@...	Auto-FAQReaderWithoutCateg...	My Organisation (MY_ORGA)	✔	✔	
Agent	[TD-AUTO]KIX2018-2080	auto-KIX2018-2080@example.com	Auto-KIX2018-2080	My Organisation (MY_ORGA)	✔	✔	

Fig.: Overview of Organisation/Contact Zoom View

11.3.1 Organisation Zoom View

Clicking any given organisation entry opens the overview that shows all of the information saved for that organisation (contact details, saved contacts, and an overview of which tickets (in various states) are linked to the organisation).

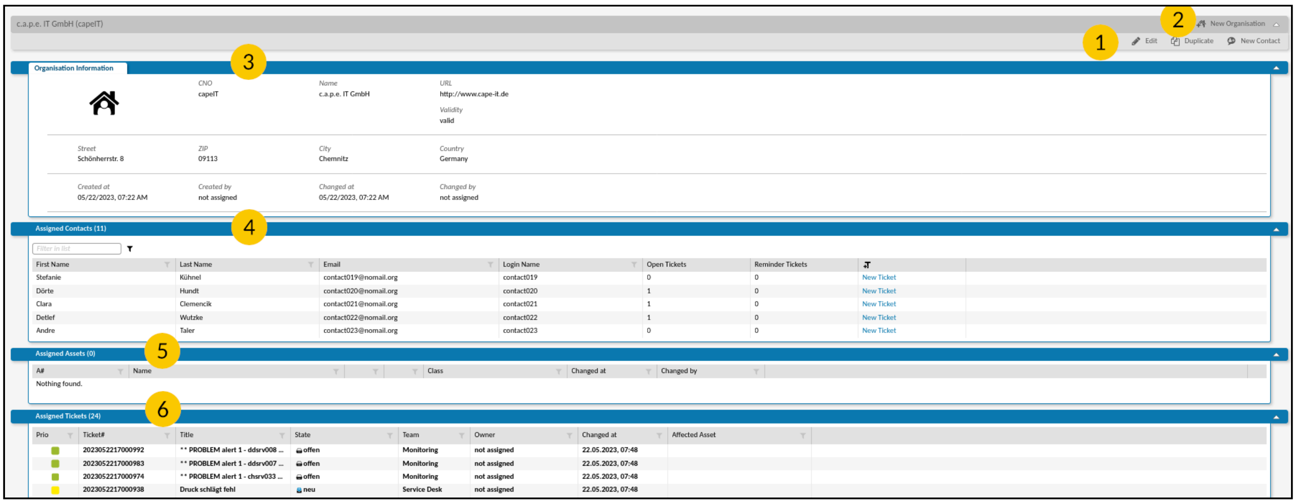


Fig.: Overview of Organisation Zoom View

1	This area indicates the various options available for editing an organisation entry.
2	Clicking this button allows you to create a new organisation.
3	The first lane, "Organisation Information", details all of the basic information about the entry.
4	The lane "Assigned Contacts" contains all of the contacts saved for this organisation.
5	The "Assigned Assets" lane displays all of the assets linked to this organisation. The respective number in brackets represents the number of links. If required, clicking on the asset will take you directly to its detailed view.

6	The "Overview Tickets" lane depicts all of the tickets linked to this organisation. The respective number in brackets represents the number of links. Clicking the corresponding category opens a table in which all of the links are stored – including ticket number and brief description. If required, you can also click on the line to access the linked ticket.

11.3.2 Contact Zoom View

Clicking any given contact opens the overview to all of the information saved for that contact (contact details, associated organisation, and an overview of which tickets (in various states) are linked to the contact).

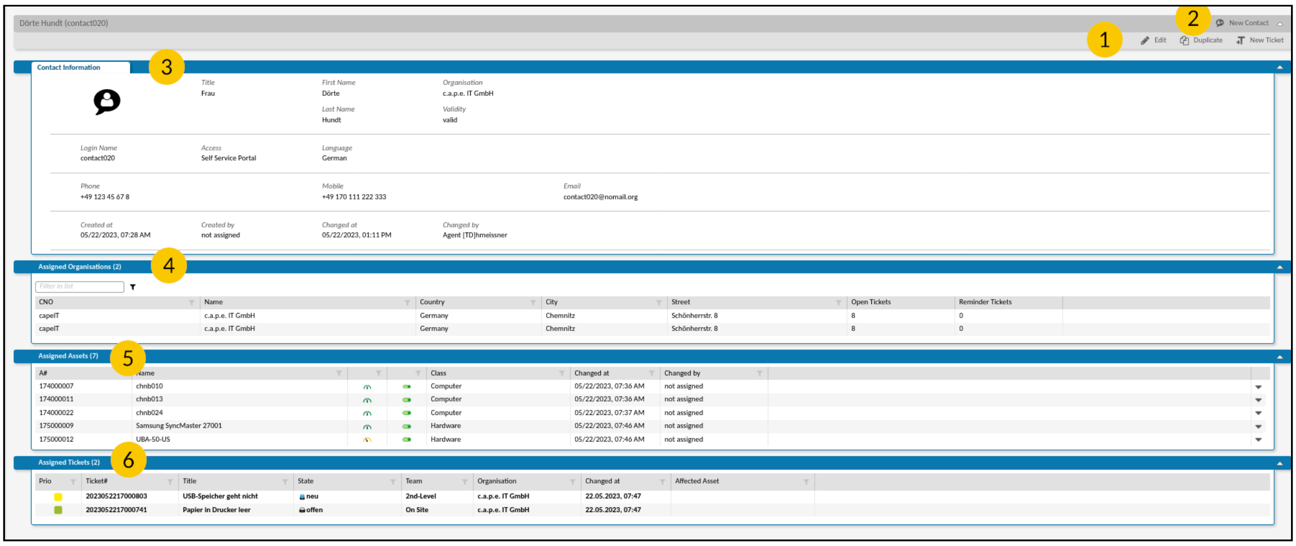


Fig.: Overview of Contact Zoom View

1	This area indicates the various options available for editing the contact.
2	Clicking this button allows you to create a new contact.
3	The first lane, "Contact Information", details all of the basic information about the entry.
4	The lane "Assigned Organisations" contains all of the contacts saved for this organisation. If required, clicking on the organisation will take you directly to its detailed view.

5	The "Assigned Assets" lane displays all of the assets linked to this organisation. The respective number in brackets represents the number of links. If required, clicking on the asset will take you directly to its detailed view.
6	The "Overview Tickets" lane depicts all of the tickets linked to this organisation. The respective number in brackets represents the number of links. Clicking the corresponding category opens a table in which all of the links are stored – including ticket number and brief description. If required, you can also click on the line to access the linked ticket.

11.4 How to Create an Organisation and Edit this Entry

11.4.1 Creating a New Organisation

To create a new organisation, click on 

or select "Organisation" in the ticket button of the Home Dashboard. A tab will then open.

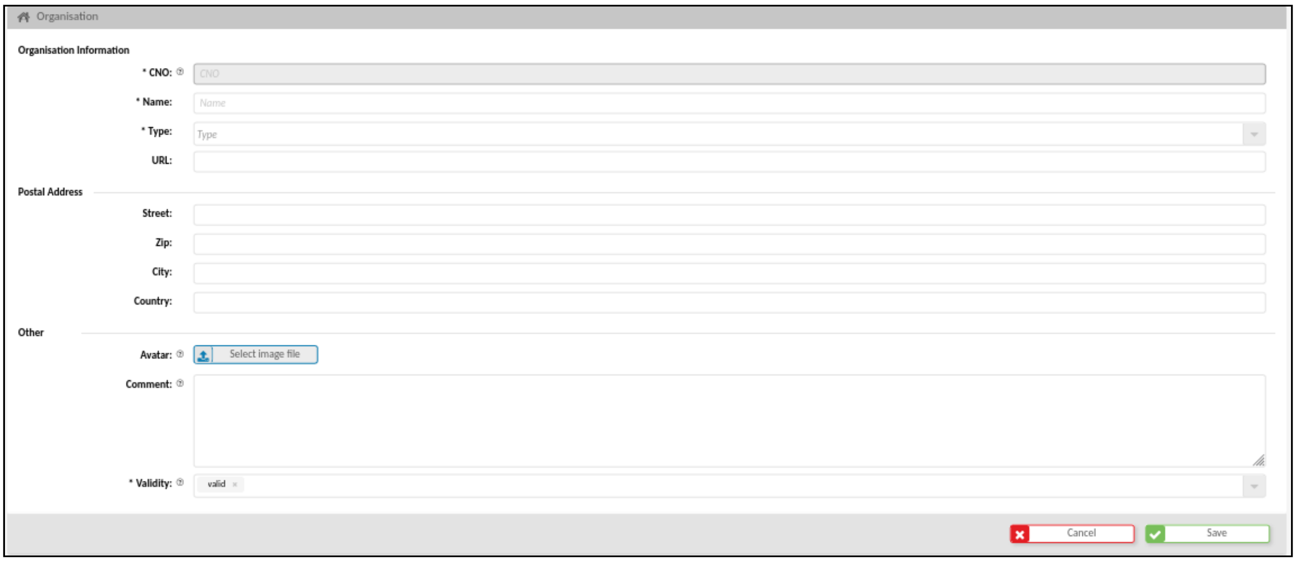


Fig.: "New Organisation" Form

Work through the form step by step. Fields marked with * are mandatory and must be completed. If there is a downwards-pointing arrow on the right next to any given field, a selection menu will open when you click the respective field. To apply the selected entries in these selection fields, click on "Apply" or outside the opened selection field to apply the selected entries.

Editing Options	**Explanation**
CNO	Enter a unique identifier (e.g. a customer number) for the organisation. Info: The input field for editing the customer number can also be edited at a later date. The change is saved and visible on assigned objects. ⚠ Any automated functions such as jobs, actions etc. that used this number (KNR) as a value will then no longer work!
Name	Enter the (company) name of the organisation.

Editing Options	Explanation
Type	Enter the type of your organization. "Customer", "Service Provider", "Supplier/Partner (external) " and "Supplier/Partner (internal)" are available.
URL	Enter the link to the website of the organisation.
Adress block	Enter the address details for the organisation.
Email Address Domain	Up to 25 domain patterns can be stored for each organisation (optional). The patterns are parts of the e-mail address domain. The asterisk is supported as a wildcard. Valid patterns are e.g: • my.company.com • *.company.com • *.company.* • *.*.de • my.*.com • my.company.* *.* • my.company.* *.*.* ⚠️ It is not possible to use a hyphen, e.g: *-fima.de If KIX receives emails from unknown contacts or if no organisation is stored for the contact, KIX can assign the corresponding organisation to the contact using the patterns stored here. To do this, KIX compares the sender's email domain with the patterns specified here. Example: The domains "*kixdesk.com" and "*capeIT.de" are stored for the organisation "cape IT". The previously unknown email senders "info@capeIT.de" or "mail@kixdesk.com" are automatically assigned to the "capeIT" organisation.
Avatar	If required, you can upload an associated image. It is not possible to subsequently configure the image size. Recommendation: Use a square image or an image in portrait format! The stored avatar can be a picture of the contact or a striking example picture for the contact. The system then uses this image in the ticket details, the sidebar, etc.
Comment	Useful additional information can be added in this field.

Editing Options	Explanation
Validity	Here you decide whether the organisation is "valid", "invalid" or "invalid-temporarily". The organisation can only be used in the system if it is set to "valid".

Finally, click "Save" to create the new organisation.

> ⓘ Contacts and organisations: In the KIX Agent Portal, contacts do not necessarily have to be assigned an organisation. Tickets for these contacts also do not necessarily require an organisation. When using the SSP, however, the assignment to an organisation is mandatory.

11.4.2 Editing an organisation entry

Clicking any given organisation entry opens the overview that shows all of the information saved for that organisation (contact details, saved contacts, and an overview of which tickets (in various states) are linked to the organisation).

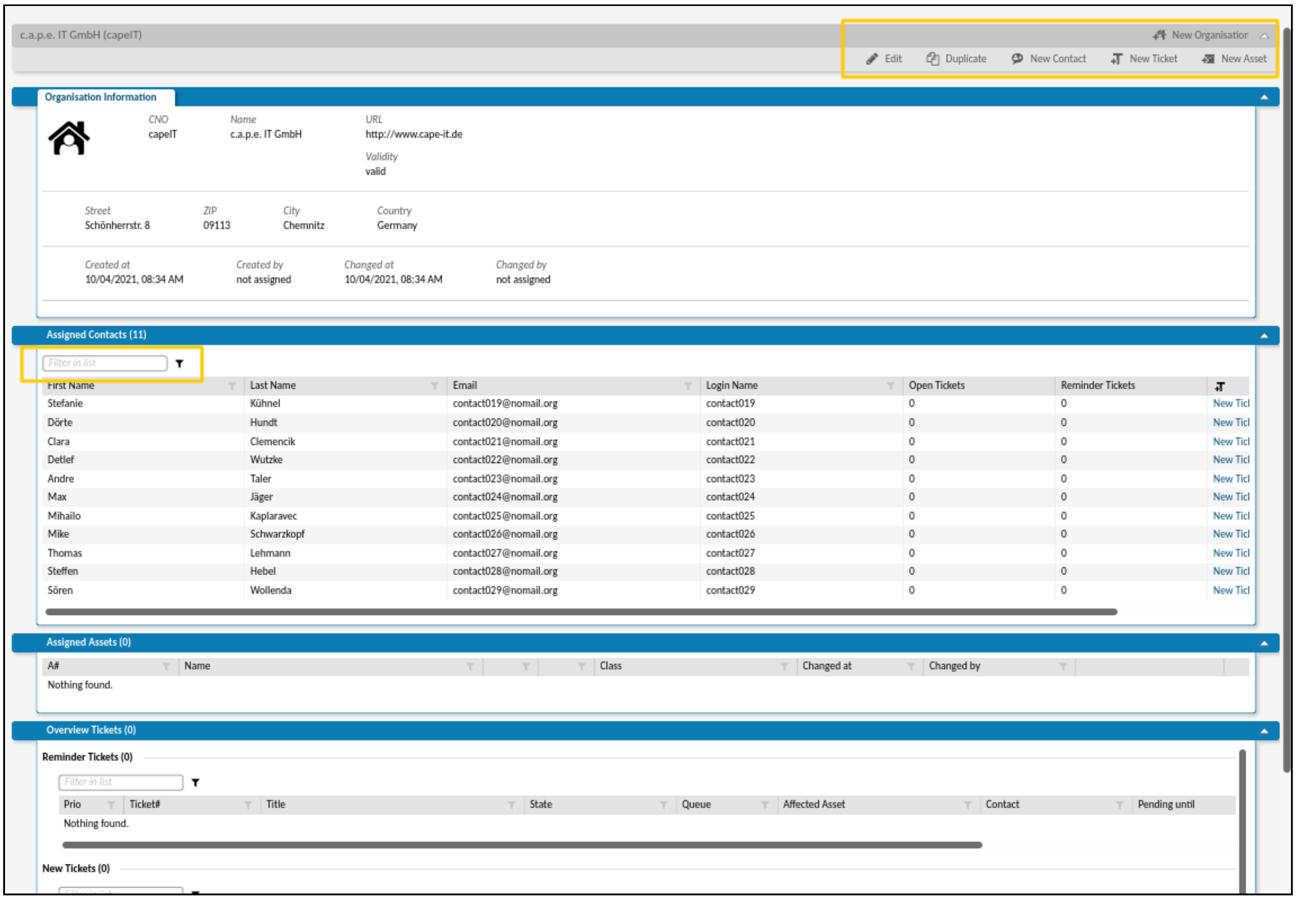


Fig.: Overview of Options for Editing an Organisation Entry

The following table explains the various options available for editing a ticket.

Editing Options	Explanation
New Organisation	Clicking this button allows you to create a new organisation.
Edit	Clicking this button opens a new window containing all of the information about the organisation. Here you can make changes, similar to the "Create Organisation" process. Clicking "Save" ends the process and saves the changes you made.

Duplicate	Clicking this button opens a new window in which you can create a new organisation:
	• The dialog is pre-populated with the detailsfrom the outset organisation.
	• Except for the following fields:
	    • The form field "CNO" is empty and has to be completed.
	    • The entry in the "Name" form field is: "Copy of [nameof organisation]", which you should modify.

New Contact	Clicking this button opens a new window in which you can create a new contact. The procedure is the same as when creating a new contact using the button "+NEW".
New Ticket	Clicking this button opens a new window in which you can create a new ticket. The procedure is the same as when creating a new ticket using the button "+NEW".
New Asset	Clicking this button opens a new window in which you can create a new asset. The procedure is the same as when creating a new asset using the button "+NEW".
Filter	Enables you to restrict the results in the table based on a search term. To do this, enter the term and click the filter symbol.

11.5 How to Create a New Contact and Edit Existing Ones

11.5.1 Adding a New Contact

To create a new contact, click on

- "New Contact" in the detailed view of an organisation,
- "New Contact" in the detailed view of a contact or
- select "Contact" in the Ticket+ button in the header of the Home Dashboard.

This opens a tab with the form for creating a new contact.

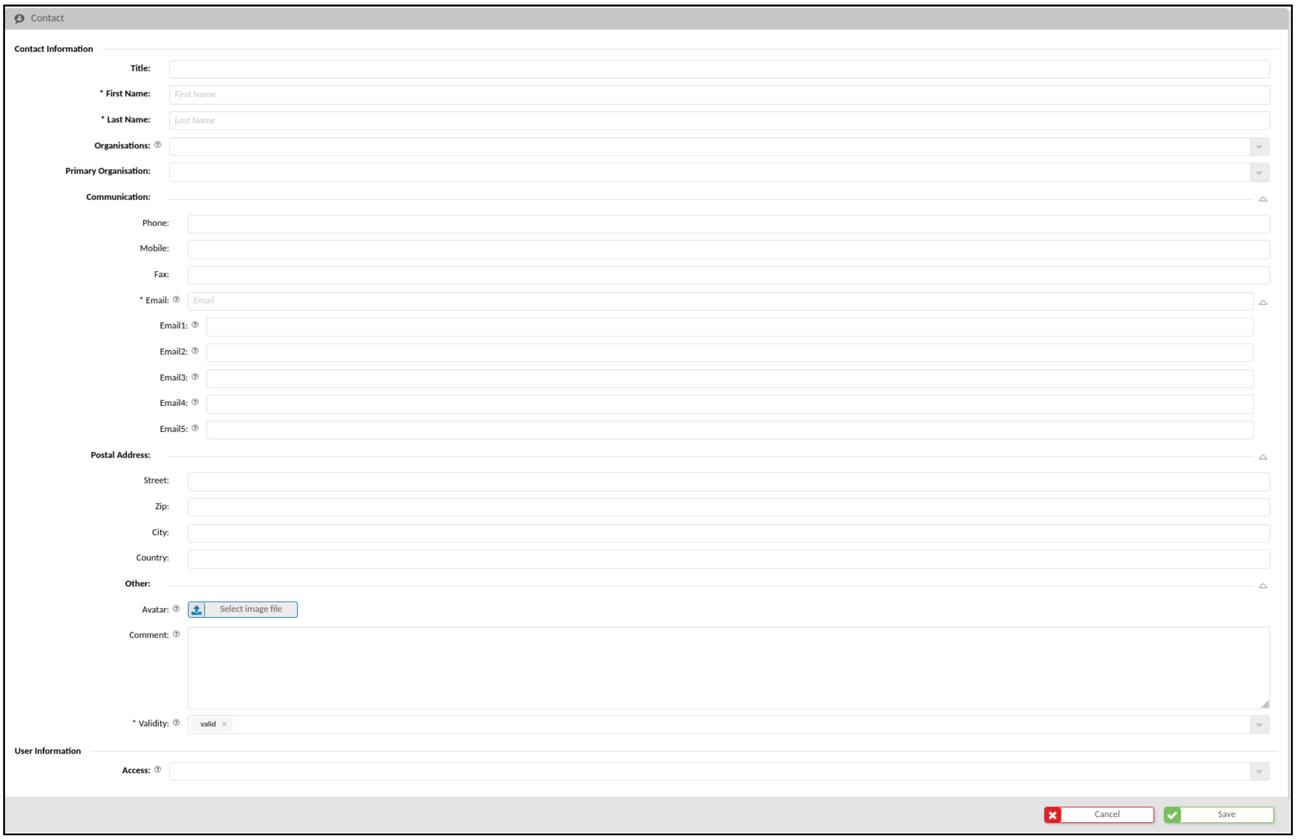


Fig.: "New Contact" Form

Go through the form line by line and enter the relevant information. Fields marked with an * are mandatory and must be completed. If there is an arrow pointing downwards to the right of the field to be filled in, a selection menu opens when you click in the field. After each entry in a field, the value entered is checked (check for workflow rules). This can lead to delays during input. To apply the selected entries in these selection fields, click on "Submit" or outside the open selection field to apply the selected entries.

Editing Options	Explanation
Contact Information block	Enter the contact person's data. When creating and editing contact data records, in addition to the single selection "Primary organisation" (company that is the contact person's main field of activity), a multiple selection "Organisations" is also available for the organisation. The multiple selection is used if the contact works for different organisations. Contacts and organisations: An organisation does not necessarily have to be assigned to the contacts in the KIX agent portal. If you enter an email address, the organisation is automatically set based on the mail domain (unless otherwise configured by the admin). The same happens when KIX automatically creates new contacts. Tickets for these contacts do not necessarily require an organisation either. When using the SSP, however, the assignment to an organisation is mandatory.
Communication block	Enter the data at which the contact person can be reached. Several e-mail addresses can be assigned to a contact. The address in the E-mail field acts as the primary address (main e-mail address).
Address block	Enter the address details for the contact person.
Avatar	If required, you can upload an associated image. It is not possible to subsequently configure the image size. Recommendation: Use a square image or an image in portrait format! The stored avatar can be a picture of the contact or a striking example picture for the contact. The system then uses this image in the ticket details, the sidebar, etc.
Comment	Useful additional information can be added in this field.
Validity	Here you specify whether the contact is "valid", "invalid" or "temporarily invalid". The contact can only be used in the system if it is set to "valid".

Editing Options	Explanation
User Information	Enter here whether the contact will receive access to the agent portal or to the Self Service Portal (for customers) or to both portals via "Select all". If you have admin rights, you can also assign user rights to the contact. This gives them access to the agent and/or service portal. You can find out how to do this in the Admin manual.

Finally, click "Save" to create the new contact.

11.5.2 Editing a Contact

Clicking any given contact opens the overview to all of the information saved for that contact (contact details, associated organisation, and an overview of which tickets (in various states) are linked to the contact).

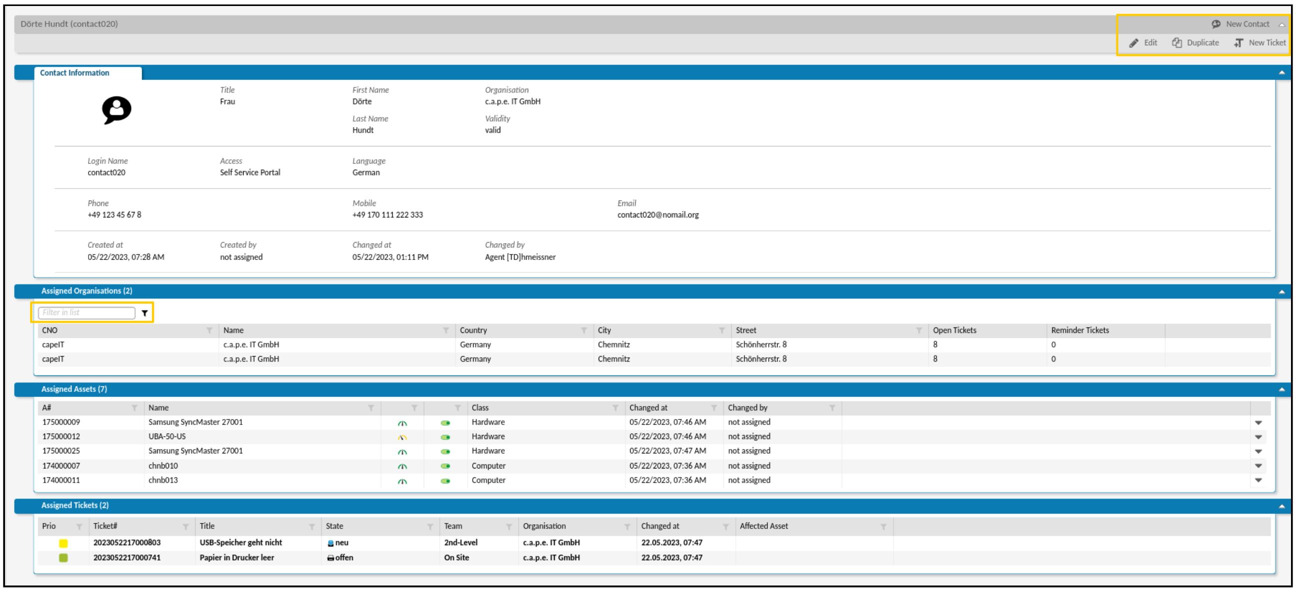


Fig.: Overview of Options for Editing a Contact

The following table explains the various options available for editing a ticket.

Editing Options	**Explanation**
New Contact	Clicking this button allows you to create a new contact.
Edit	Clicking this button opens a new window containing all of the information about the contact: Here you can make changes, similar to the "Create Contact" process. Clicking "Save" ends the process and saves the changes you made.
Duplicate	Clicking this button opens a new window in which you can create a new contact: • The dialog is pre-populated with the details from the outset contact. • The field "Email" is empty and has to be completed.
New Ticket	Clicking this button opens a new window in which you can create a new ticket. The procedure is the same as when creating a new ticket using the button "New Ticket".
Filter	Enables you to restrict the results in the table based on a search term. To do this, enter the term and click the filter symbol.

11.6 I need additional information about the organization or contacts - how does that work?

If additional information is required for organizations, the KIX administrator can configure this information centrally. These include, for example, customer and vendor numbers, status AV agreements, extended information to organizations or VIP IDs and newsletter subscriptions to contacts.

This information is then available when editing, viewing and using organizations and contacts.

The procedure for setting up additional information is carried out using "dynamic fields" and is described in the admin manual (dynamic fields).

12 FAQ Dashboard

FAQs (Frequently Asked Questions) comprise a compilation of information for frequently asked questions/ frequently occurring problems and their solutions.

You can open this widget via . The numbers in brackets indicate the number of articles contained in this category. The associated table only opens by clicking on a category. If required, you can collapse this window by clicking .

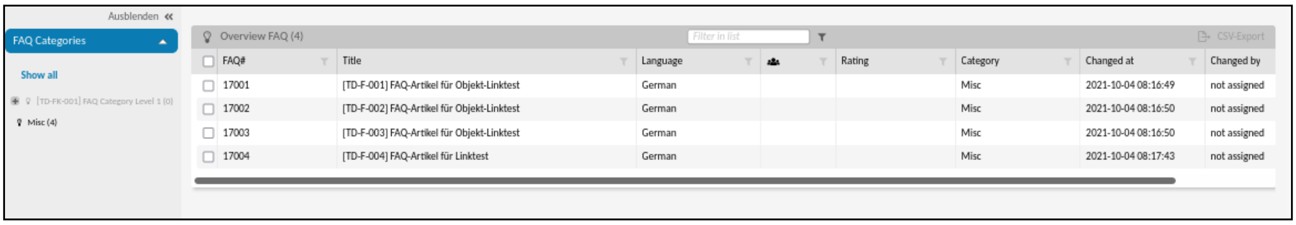


Fig.: FAQ Dashboard Overview

12.1 The FAQ Table

The header of the respective table includes the following functions for you to use:

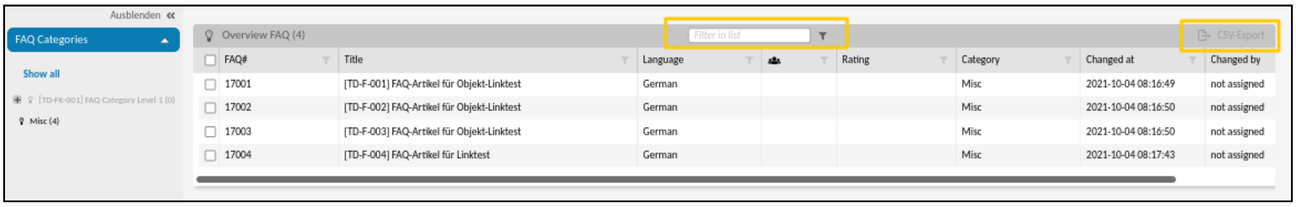


Fig.: FAQ Table Functions

Function	Explanation
Filter	Enables you to search though the table based on a search term. To do this, enter the term and click the filter symbol.
CSV Export	This action becomes active as soon as at least one ticket has been selected/checked off in the table. More information on this can be found in the "Function Descriptions" section.

Function	Explanation
(Filter in each column)	Here you have the option of searching the respective column for a search term. Enter the term and click on the filter symbol.

If you want to open a certain FAQ entry, click the line in the table.

12.2 FAQ Zoom View

The FAQ zoom view is where you can find all of the FAQs in the system. Here you can also execute FAQ-related actions.

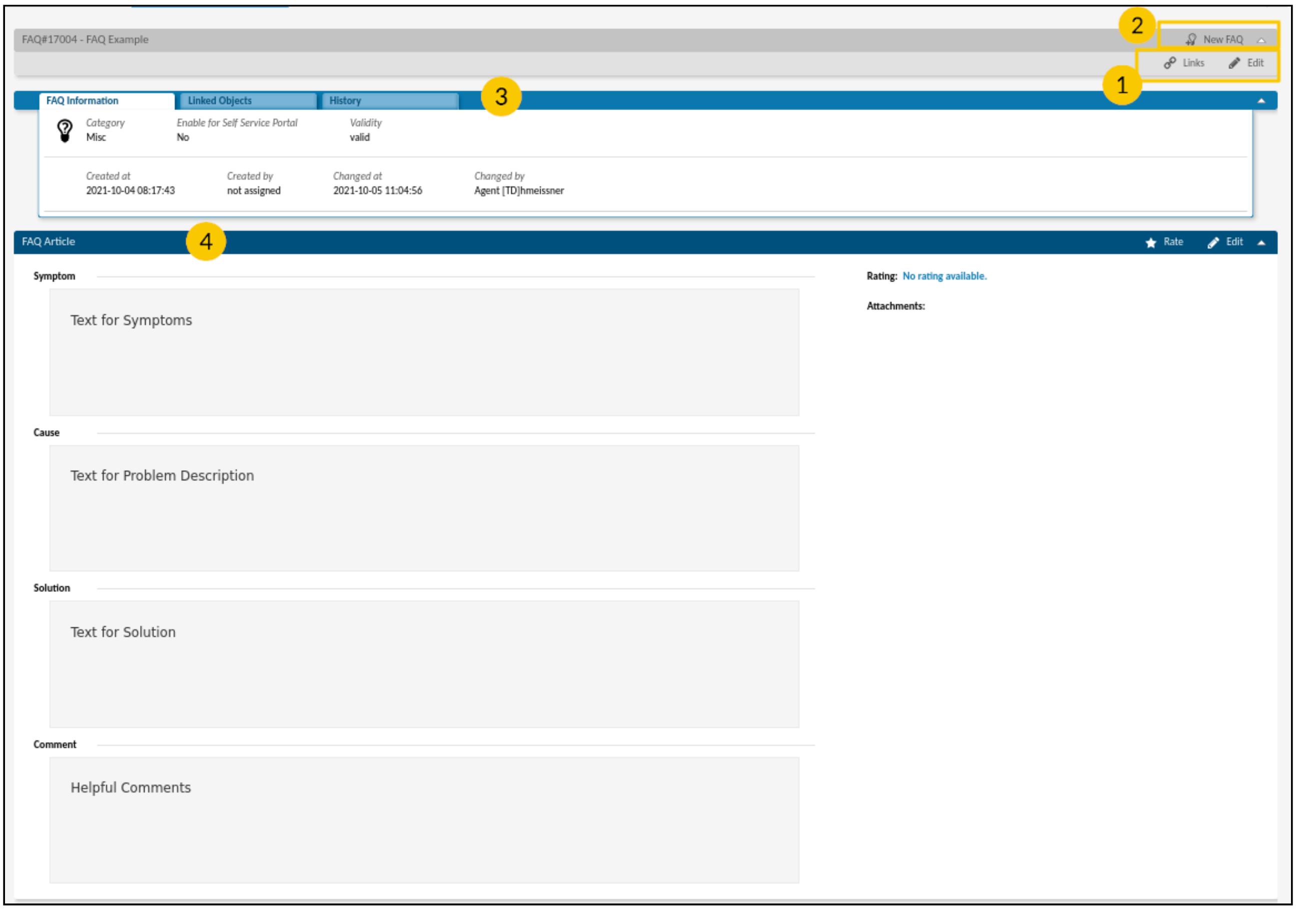


Fig.: FAQ Zoom View Overview

1	This area indicates the various options available for editing an FAQ entry.
2	Clicking this button allows you to create a new FAQ entry.

3	The first lane contains three tabs. The first tab, "FAQ Information", details all of the basic information about this entry. The second tab, "Linked Objects", displays all of the FAQ entry links, broken down by link to tickets, assets or other FAQs. The respective number in brackets represents the number of links. Clicking the corresponding category opens a table in which all of the links are stored – including ticket number and a brief description. If required, you can also click within the line to access the linked ticket, asset or FAQ. The third tab, "History", contains a list of all work performed on the FAQ entry. You can search through this using the filter. This field is initially always expanded.
4	In the second lane, "FAQ Article", you can see all of the information (symptom – cause – solution – comment). Here you have two options: either rate the quality of the entry, or click  to edit the entry. This field is initially always expanded.

12.3 How to Create an FAQ Entry and Edit it?

12.3.1 Creating a New FAQ Entry

To create a new FAQ entry, click on  or select "FAQ" in the ticket button of the Home Dashboard. A tab will open.

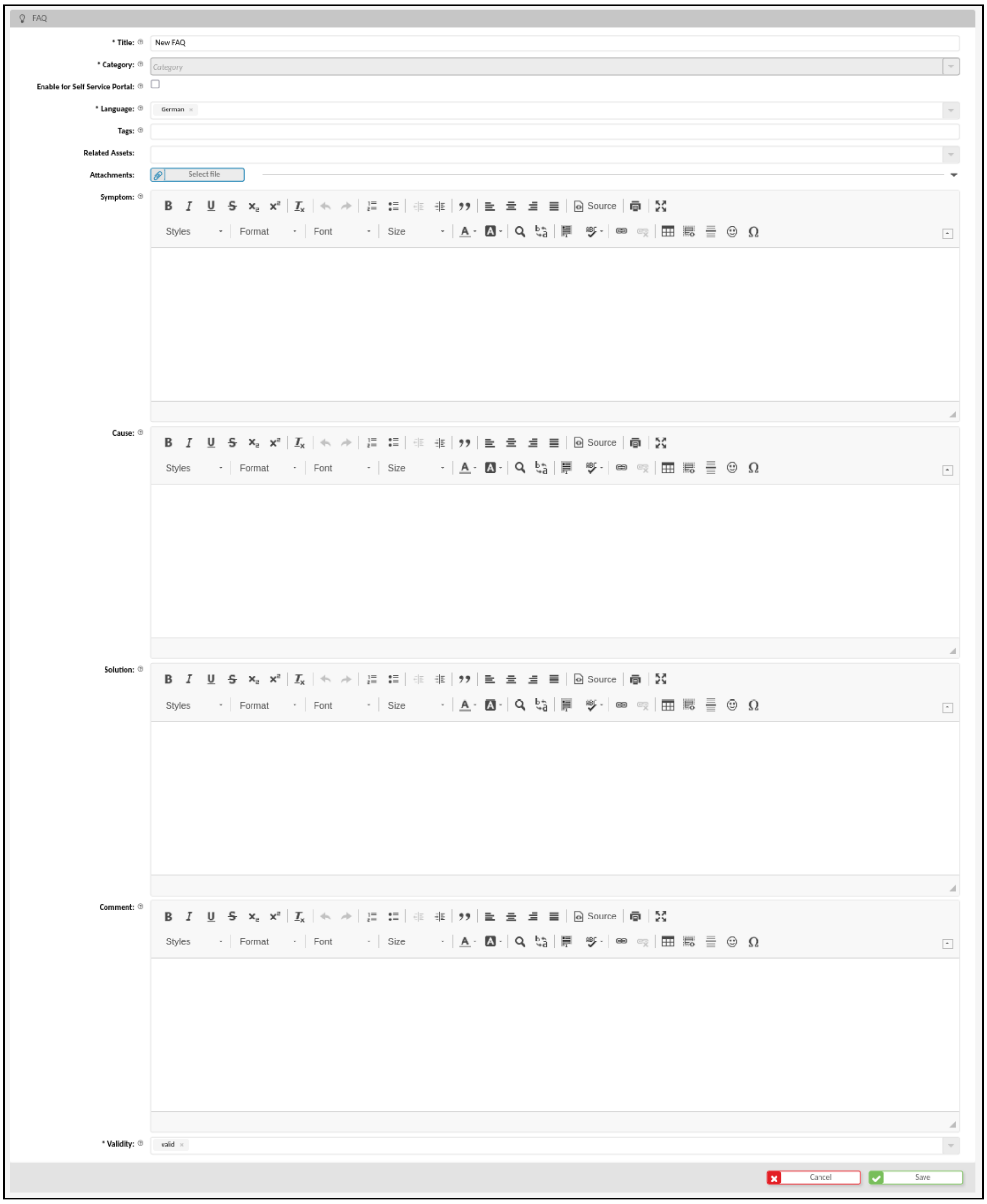


Fig.: "New FAQ" Form

Work through each line one by one. Fields marked with * are mandatory and must be completed. If there is a downwards-pointing arrow on the right next to any given field, a selection menu will open when you click the respective field. To apply the selected entries in these selection fields, click on "Apply" or outside the opened selection field to apply the selected entries.

Title	Choose a title or designation by means of which the new FAQ is to be found.
Category	Select the relevant FAQ category from the list.
Show in Customer Portal	Select where the FAQ article can be displayed: • Checkbox not selected: only displayed in the KIX agent portal • Checkbox selected: displayed in the KIX agent portal and KIX Self Service Portal
Language	Select the language in which the FAQ entry is to be created.
Tags	Enter relevant keywords for the FAQ article to be created. This way it will be found more quickly in a search. Note: Keywords in connection with the ticket subject or title influence the content of the "Recommended FAQ" table on the various dashboards.
Related Asset	Enter relevant or affected assets for the FAQ article to be created. This information also has an impact on the "Recommended FAQ" table on the various dashboards.
Attachments	Here you can add files to the FAQ article. You can do this using Drag & Drop.
Symptom	Describe the symptom/situation in as much detail as possible.
Cause	Explain the cause in as much detail as possible.
Solution	Describe the solution or explanation of the above-mentioned symptom/situation.
Comment	Additional useful information can be added in this field.

Validity	Here you decide whether the FAQ article is "valid", "invalid" or "invalid-temporarily". The FAQ entry can only be used in the system if it is set to "valid". Invalid FAQ entries can only be found using the search function.

Finally, click "Save" to create the new FAQ.

> **Note**
>
> When creating an FAQ, make sure to describe it as accurately and in as much detail as possible. This will help you and your colleagues to work efficiently with the FAQs.

12.3.2 Editing an FAQ Entry

The FAQ Dashboard contains an overview of all the saved FAQs. Select the category and the corresponding entry that you would like to edit.

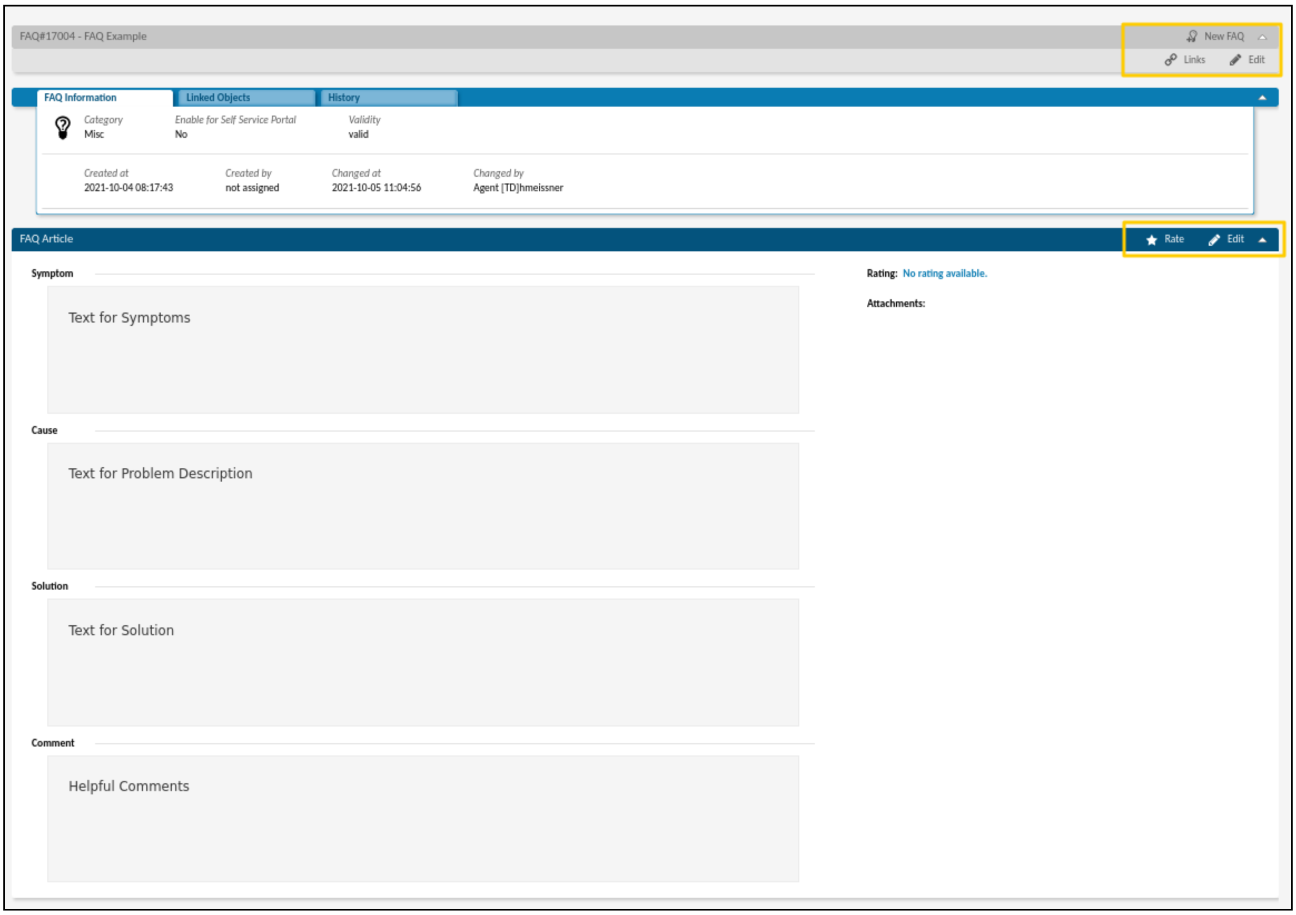
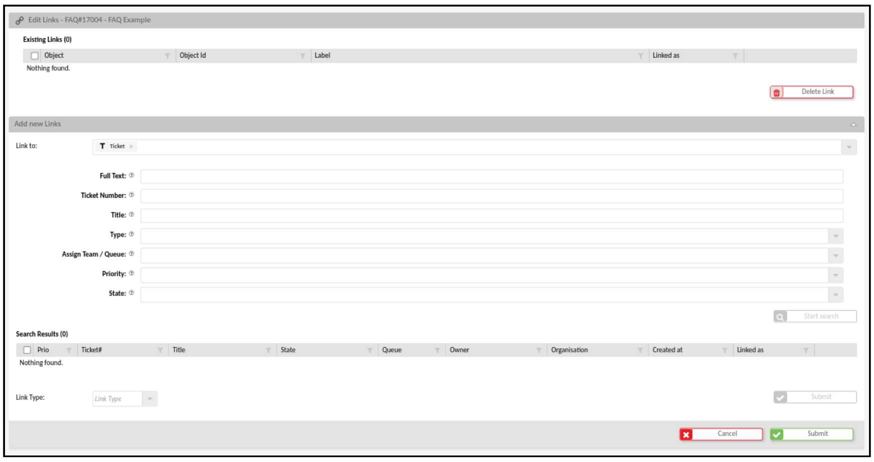


Fig.: Overview of Options for Editing an FAQ Entry

The following table explains the various options available for editing a ticket.

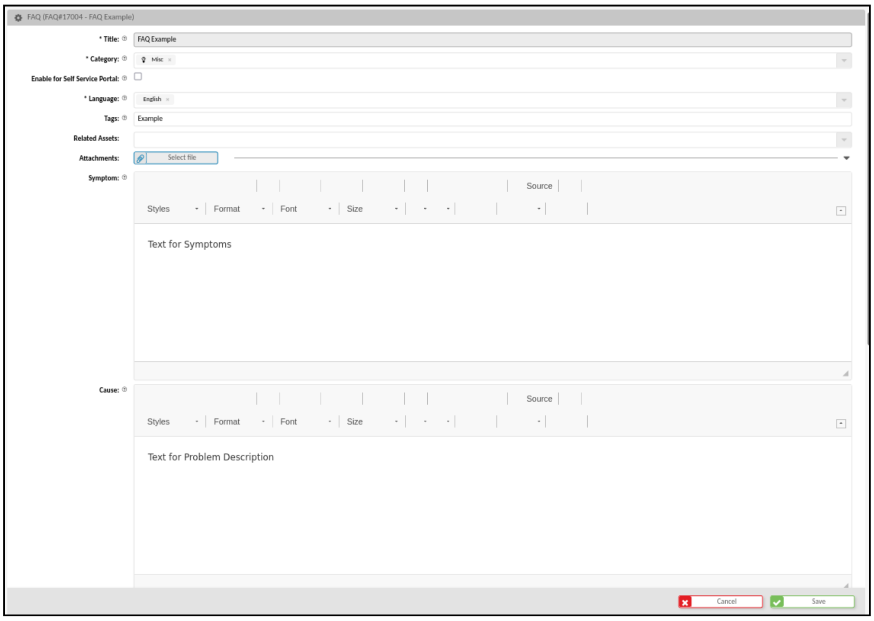
Editing Options	**Explanation**
New FAQ	Clicking this button allows you to create a new FAQ.

<table>
<tr><th>Editing Options</th><th>Explanation</th></tr>
<tr><td>Links</td><td>
Clicking this button opens a new window containing a list of all the existing links.
You can use the filter function to search through this list.
To delete an existing link, select the element from the table and click the "Delete link" button.
If you want to create a new link, click "Assign Link". A new tab opens:



First select the element to which you want to link the ticket: another ticket, an FAQ or an asset.
Fill in the fields with any information you know about the element that you are searching for.
Please note: you don't have to fill in all of the fields.
Then click "Start search".
The result list will show all of the relevant results.
Select the element you want by checking off the empty box in front of it. A check mark will be visible in the field.
When clicking within the line, the element will be opened in a separate tab.
Next, select the type of link. After doing so, the "Submit" button will be activated.
Finally, click "Submit". The link is now established.

</td></tr>
</table>

Editing Options	Explanation
Edit	Clicking this button opens a new tab containing all of the information about the FAQ entry:  Here you can make changes, similar to the "Create FAQ" process. Clicking "Save" ends the process and saves the changes you made.
Rate	Clicking this buttons allows you to rate the quality of the entry.
Edit	Clicking here allows you to make changes, similar to the "Create FAQ" process. Clicking "Save" ends the process and saves the changes you made.

Note: With the appropriate authorisation - assigned by your admin - the "Delete" function is also available.

Please note

You can rate the FAQ article based on how helpful it was in solving your problem. In the "FAQ Article" lane, click the "Rate" button. A small window will open where you can apply a star rating.

13 Reporting

Reports are used for a wide variety of company areas and organizational units. They provide important key figures for evaluations and analysis in order to define corporate strategies, keep an eye on the set goals and draw conclusions. In addition, reports complement the cooperation with customers and business partners by making the economic basis of the cooperation transparent and clear. KIX reporting supports you in these strategic and operational tasks.

Depending on your authorizations, the "Reports" area is available to you. It contains an overview of all report configurations available to the user as well as a list of reports that have already been created.

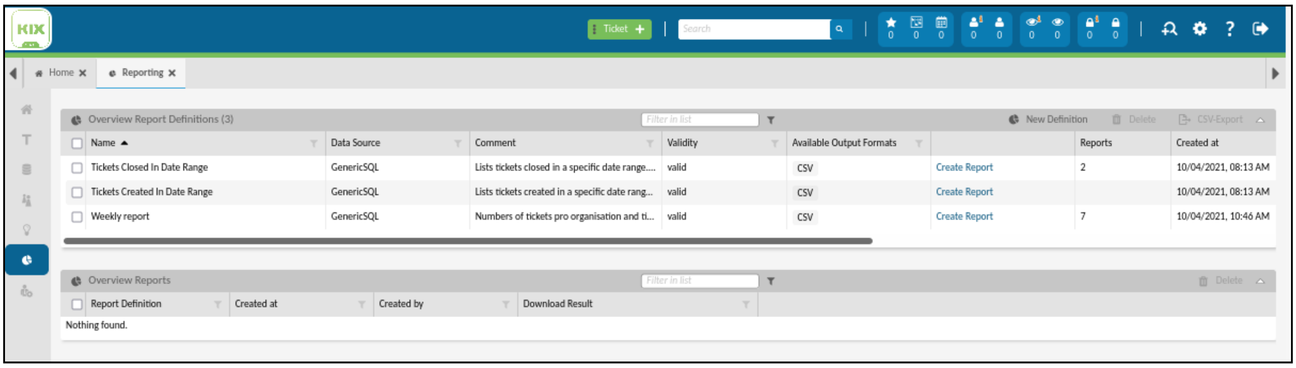


Fig .: Overview of reporting

The following functions are available in this dashboard:

Filter	Here you have the option of searching the table for a search term. To do this, enter the term and click on the filter symbol.
New Definition	Clicking the button opens the form for creating a new report definition.
Delete	The action becomes active as soon as at least one definition in the table has been selected or ticked. Click the button to delete the selected report definition. Multiple definitions can also be selected for deletion at the same time.
CSV Export	The action becomes active as soon as at least one report definition in the table has been selected or checked. You can find more information on this in the "General function descriptions" chapter.

(Filter in each column)	Here you have the option of searching the respective column for a search term. Enter the term and click on the filter symbol.

13.1 How do I create a report?

As an agent without report management rights you can perform the following actions:

- Create a report
- Output of a report
- Delete a report

13.1.1 Create a report

To create a new report, click in the "Overview Report Definitions" table in the column of the required report in the "Create report" field. The following window opens:

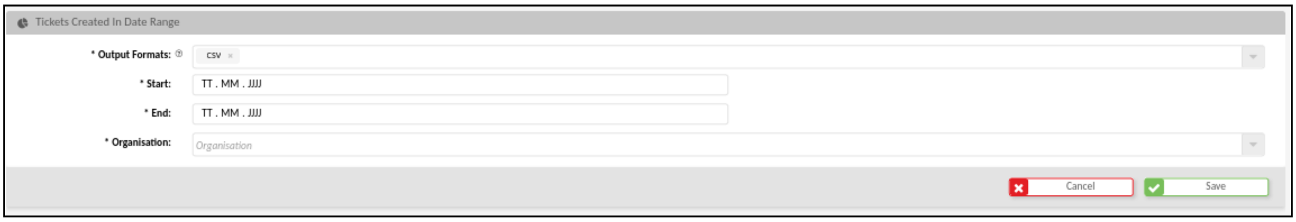


Fig .: "New report" form

Enter the required information, all fields are mandatory.

Fieldname	Input option
Output format	Select the format of the output of your report here. • CSV Info: There are other formats available in KIX Pro.
Start	Enter the start time of the evaluation.
End	Enter the end time of the evaluation.
Organisation	Select the customer or customers for whom the report is to be generated.

Finally click on "Create".

The required report can be found in the "Reports overview" table and can be downloaded from there. It can take some time to generate the report.

13.1.1.1 Overview of preconfigured report definitions

KIX Start is delivered with 2 preconfigured report definitions for standard reports. If necessary, your admin can reconfigure this and use it as a guide for creating your own report definitions.

Report definitions in KIX Start

Number of open tickets by priority	Lists open tickets by priotity.
Number of open tickets by state	Lists open tickets by state.
Number of open tickets by team	Lists open tickets by team.
Number of open tickets in teams by priority	Lists open tickets by in teams by priority.
Number of tickets closed within the last 7 days	Lists closed tickets within the last 7 days.
Number of tickets created within the last 7 days	Lists tickets created within the last 7 days.
Tickets closed in date range	List of the closed tickets of selected organisations within a certain period of time, sorted by name / description of the ticket type and the ticket number. The period and the organizations can be selected in the dialog when creating the report.
TicketscCreated in date range	List of tickets created by selected organisations within a certain period of time, sorted by name / description of the ticket type and the ticket number. The period and the organizations can be selected in the dialog when creating the report.

The reports form the basis for the statistics in the Home Dashboard.

Important: Do not change the output format, as the statistics only evaluate reports in CSV or JSON format.

13.1.2 Output report

A report is output in two steps.

Step 1: "Overview of report definitions" (upper table)

- In the table, select the report definition for which you want to download the generated report.
- 1 In the "Reports" column you can see the number of existing reports that have already been created.
- 2 Put a tick in the checkbox in front of the name of the corresponding definition.

Step 2: "Reports overview" (table below)

- In the "Reports overview" table, after clicking on the desired report definition, you can see all reports that have been created for this definition so far.
- 3 Click in the "Download result" field in the column for the report you want. The download dialog opens. Click "OK" to start the download.

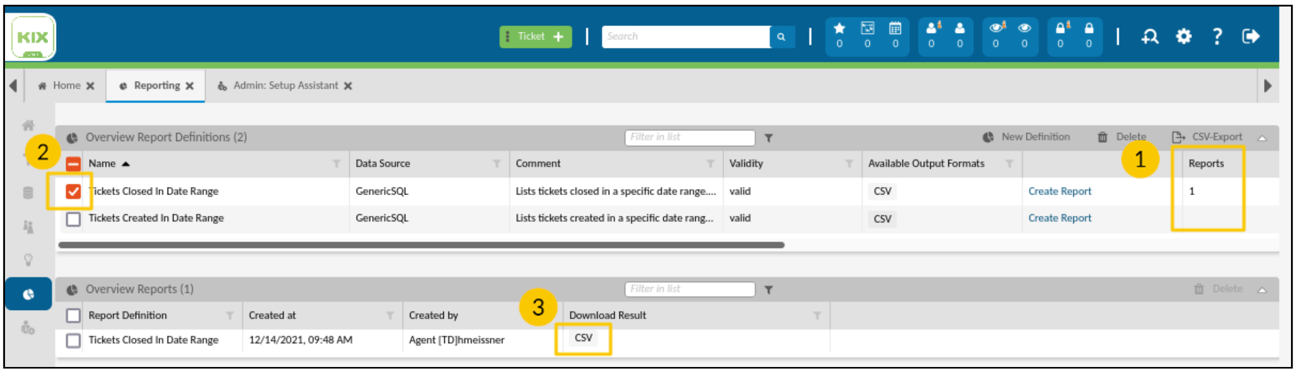


Fig.: Report output step by step

Tip: Users with administrator rights can create jobs with which reports can be generated automatically. You can find information on this in the admin manual.

13.1.3 Delete report

To delete a report, check the checkbox in front of the desired report in the "Reports overview" table. This activates the "Delete" button in the upper right corner of the table. If you now click the "Delete" button, a window opens asking whether you really want to delete the selected report (s). This is to ensure that you do not accidentally delete reports. Select "Yes" and the report will be deleted.

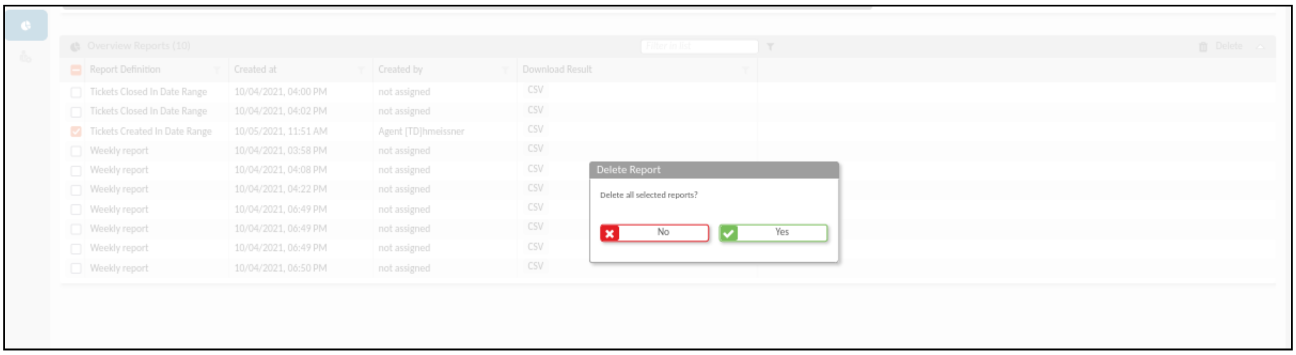


Fig .: Delete report

13.2 How do I create a report definition?

The "Reports" module enables the creation of individual reports for the evaluation of key figures. You can create individual report definitions for this. This requires the "Report Manager" role, which your admin can assign to you in the system.

The report manager

- can create, edit and delete report definitions.
- can use valid report definitions to create and download reports.
- **Important**: Requires at least the "System Admin" role in order to be able to assign roles in the report definition.

13.2.1 Create a report definition

To create a report definition:

1. Click New Definition in the header of the Report Definitions Overview table.
   An assistent opens in which you can configure the report definition step by step.

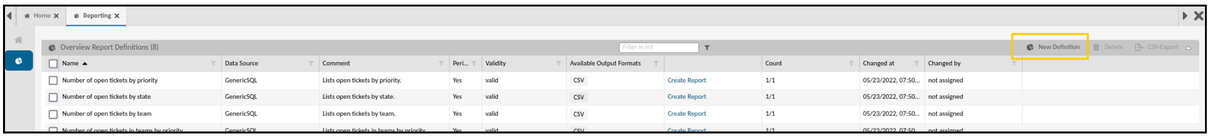


Fig.: Overview of report definitions with "New definition" button

2. Configure the report definition as needed. It consists of the three pages "Report Information", "Datasource" and "Output Format". To get to the next step or to switch between the individual steps, please click on the small blue arrow buttons or on the blue dots in between.
   You can find an example configuration in the admin manual under Reporting - Configure a report.

3. Finally, click "Save" to save the report definition.
   The report definition is now listed in the "Report definitions overview".

Now the basis has been created to create a report from this definition.

13.2.2 Initial report definitions

A number of preconfigured report definitions for standard reports are supplied by default. If necessary, you can reconfigure these and use them as a guide for creating your own report definitions.

Report name	**Description**
Tickets Closed in Date Range	List of the closed tickets of selected organizations within a certain period of time, sorted by name / description of the ticket type and the ticket number. The period and the organizations can be selected in the dialog when creating the report.
Tickets Created in Date Range	List of tickets created by selected organizations within a certain period of time, sorted by name / designation of the ticket type and the ticket number. The period and the organizations can be selected in the dialog when creating the report
Number of open tickets by priority	Number of open tickets by priority
Number of open tickets by state	Number of open tickets by state
Number of open tickets by team	Number of open tickets by team
Number of open tickets in teams by priority	Number of open tickets in teams by priority
Number of tickets closed within the last 7 days	Number of tickets closed within the last 7 days You can change the interval in the SQL statement if necessary.
Number of tickets created within the last 7 days	Number of tickets created within the last 7 days You can change the interval in the SQL statement if necessary.

14 Liability Disclaimer for KIX Start

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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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