KIX Pro

KIX 17 Admin Manual - EN

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1 Information on Using this Manual

In the course of transparency and efficient handling, this manual only deals with the additional functions of KIX Pro 17. For a description of all basic functions, please refer to the manual for KIX Start 17.

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

The manual for administrators can be found at https://docs.kixdesk.com/, as well as all other documentation on KIX 18.

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

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 legibility and understanding of the text. We ask all readers for their understanding for this simplification in the text.

2   Installing KIX Pro

Requirements for installing KIX Professional are:

- You have a valid maintenance contract.
- KIX Start is already installed on your system.

> ⓘ **Please note**
>
> If this is not the case, please follow installation instructions in KIX Start Administrator Guide.

- The following libraries must be stored in your system:
    - GD::SecurityImage
    - Spreadsheet::ParseExcel
    - File::Which
- Recommendation – the following libraries should be stored in your system:
    - Image::Magick

KIX Professional is exclusively enabled via customer-specific repositories. After provision of the repository, you will receive an e-mail with the subject "Access to Your KIX Professional Repository". This contains the customer key specifically generated for you and the installation instructions.

On the following pages you will also find the installation instructions for the relevant operating system.

2.1 Debian_Ubuntu

Please add the following line to file /etc/apt/sources.list:

```
deb http://packages.kixdesk.com/customers/xxxxxxxxxx/debian kixpro2017 stable
```

Once you have integrated your personal repository and have met the requirement, install KIX Professional as follows:

```
apt-get update

apt-get install kixpro
```

2.2   SLES - SUSE Linux Enterprise Server

Add the repository of KIX Pro:

```
zypper addrepo http://packages.kixdesk.com/customers/xxxxxxxxxxx/suse/kixpro2017/
stable kixpro
```

Once you have integrated your personal repository and have met the requirement, install KIX Pro as follows:

```
zypper refresh
zypper install kixpro
```

2.3   CentOS/Red Hat Enterprise Linux (RHEL)

Create a new repository file /etc/yum.repos.d/kixpro.repo with the following content:

```
[kixpro]
name=kixpro
baseurl=http://packages.kixdesk.com/customers/xxxxxxxxxxx/redhat/kixpro2017/stable
gpgcheck=1
enabled=1
gpgkey=
proxy=_none_
```

Once you have integrated your personal repository and have met the requirement, install KIX Pro as follows:

```
yum check-updates
yum install kixpro
```

3 Additional Settings in Agent Management

3.1 Assigning Predefined Settings

In this area, you can assign predefined settings to agents that will either become effective when the agent logs in for the first time or every time the agent logs in.
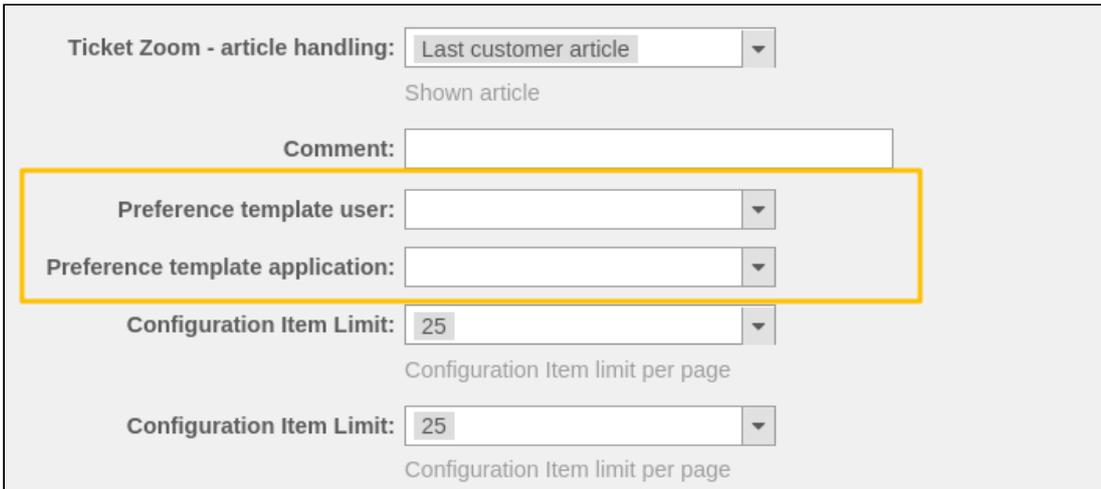
Fig.: Agent :: Setting Template for User and Application

You can choose between role-based agent templates and user-based agent templates here.

Version 1:

- You have defined roles for certain teams or individual departments, for example.
- You create one template agent per team or department that has all settings you want (personal settings and certain search templates and, if necessary, important dashlets).
- Go to SysConfig - KIX Pro config group - Core. Under the key PreferenceTemplate::RoleMapping, enter the role to be used as a key according to the template [Priority]::[RoleName]. In the same line in content, enter the login name of the agent template to be used.
- **Please note**: this setting is only executed during first login by default. Use the keyPreferenceTemplate::DefaultTemplateUserApplication to change the behavior to "reset on login".

Version 2:

- You create a template agent that has all the settings you want.
- If you now create a new agent or edit an existing agent, assign it to this template agent under Preference template user. In the next field – Preferencetemplate application – you can define whether this setting is executed during first login or during each login.
- **Please note**: if a mapping is stored in the SysConfig under the key PreferenceTemplate::RoleMapping and no template agent is assigned to the agent, version 1 applies.

Version 3:

- If you only want to use the role-based agent templates for selected agents, you have to deactivate the key PreferenceTemplate::DefaultTemplateUser in SysConfig - KIX Pro config group - Core.
- Create roles, template agents, and the mapping (key: PreferenceTemplate::RoleMapping) as described in version 1.
- Now create a new agent or edit an existing agent, assign it under Preference template user to "role based assignment". In the next field – Preference template application – you can define whether this setting is executed during first login or during each login.

Configuration of the Settings to Be Adopted

- Go to SysConfig - KIX Pro config group - Core.
- There you can find keys that start with "PreferenceTemplate::Backend###...".
- Depending on their ending (e.g. Dashboard/Position), these specify which settings are adopted by default when they are active.
- **Please note**: keys of the form "PreferenceTemplate::Backend###Custom..." are used for individual configuration and do not have a standard behavior.

ⓘ **Please note**

Role-based agent templates can be subsumed. This means that if multiple template agents are in use, the characteristics are added according to priority or they "gain" the characteristic with the highest priority.

Application Examples

- You employ a new employee and would like to provide them with the basic settings, the most important notifications, search templates, and dashlets the first time they log into the system.
- In order to prevent an agent from altering the dashboards and deleting important dashlets, the settings are reset with each login.
- A team of service agents is meant to see all tickets concerning the company X. Several of the team's employees deactivate notifications via their personal settings. They therefore do not see new jobs and do not process them. You can prevent these kinds of problems by resetting the personal settings when the agent logs into the system each day.

4 Additional Settings in Customer Management

4.1 Link Customers to Services and SLAs

In this area you can manage the relations between services, SLAs, and customers. Once you click into this area, click on Search. You will see a *"List"* widget with the relations between services, SLAs, and customers. Use the *"Filter"* widget to filter the list by certain services, customerIDs, contact logins, and SLAs. Here you can also search using the "*" wildcard character.

Figure: Manage Customer-Service-SLA Relations

Adding Customer-Service-SLA Relation

In *"Actions"* widget click "Customer-Service-SLA" button. The *"Configuration for Service - Customer - SLA"* widget will open.
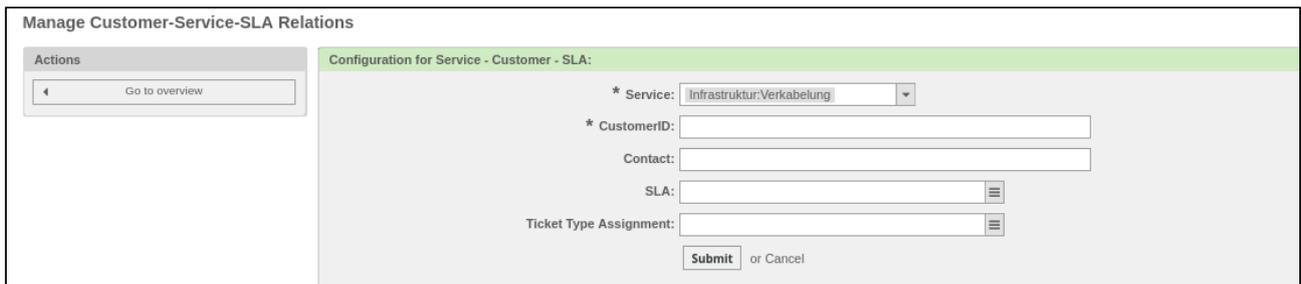
Figure: Add Customer-Service-SLA

Select the service and the customerID that you wish to link to the service.

Optionally, you can add a contact and link an SLA to the service. Furthermore, you can optionally link a certain ticket type to this customer-service relation.

4.2   Dynamic fields for contact persons and customers

With KIX Pro you have the option of storing individual values in additional fields for customers and contact persons.

4.2.1   Configuration

The dynamic fields for contact persons and customers are configured in the same way as for tickets or articles. You only have to select the object type "contact person" or "customer" in the first overview. The same field types are then available in the individual selection as for other fields.

The object type is then permanently stored in edit mode:

Fig .: Dynamic fields edit mode

The masks that can be selected to display the field can also be selected in the same way in the third sub-area. Please make sure that customer and contact fields can only be displayed in the context of customers or contact persons.

In the following screenshot, relevant masks are marked in green:

4.2.2 Display

Fields can be displayed:

- In the admin area:
    - Overview of all customers
    - Overview of all contacts
    - respective individual views
- In the agent area:
    - In the detailed information (magnifying glass) in the customer information sidebar on the ticket

4.2.3 Events on fields of this type

Dynamic fields of the object type "contact person" or "customer" can be used in the event "DynamicFieldFromCustomerUser". The basics of this event are explained in the administration documentation for KIX Start.

This event is triggered by default with "TicketCreate" and "TicketCustomerUpdate". The delivery status is "inactive", which means that it must be switched on in SysConfig before it can be used.

The configuration of dynamic fields of contact persons for the event "DynamicFieldFromCustomerUser" 'is possible via the SysConfig key "DynamicFieldFromCustomerUser :: Mapping":

If a dynamic field with the prefix "DynamicField_" is specified as the key, the value set by the contact person is transferred to the ticket in precisely this dynamic field.

The entry for the mapping must be designed as follows:

- Key (value of the contact person): Dynamic field with name "Location" => "DynamicField_Location"
- Value (value on the ticket): Dynamic field with the name "InfoContact" => "InfoContact"

If the value is not set on the contact person, the configured dynamic field on the ticket is emptied.

4.3   Expanded Service Catalog

To configure settings for this function, select "KIX Professional" group in SysConfig. After the page has been reloaded, select sub-group "Frontend::Agent:: CommonSearch".

Activation of the auto-complete search for "Customer-Services-SLA"

- SysConfig setting: KIXServiceCatalog::Frontend::CommonSearchAutoComplete###Active

Use this setting to activate or deactivate auto-complete search for input fields "Customer ID" and "Contact" in widget "Configuration for Service - Customer - SLA" in "Customer-Services-SLA" Admin area.

> ⓘ **Please note**
>
> This setting is required. Default value is "Yes".

Dynamic Width for Auto-Complete Search

- SysConfig setting: KIXServiceCatalog::Frontend::CommonSearchAutoComplete::DynamicWidth

Use this setting to define whether the width of the auto-complete drop-down menu in the input fields "Customer ID" and "Contact" in widget "Configuration for Service - Customer - SLA" dynamically adjusts to the width of the longest entry.

> ⓘ **Please note**
>
> This setting is required. Default value is "No".

- SysConfig setting: KIXServiceCatalog::Frontend::CommonSearchAutoComplete::DynamicWidth

Use this setting to define whether the width of the auto-complete drop-down menu in the input fields "Customer ID" and "Contact" in widget "Configuration for Service - Customer - SLA" dynamically adjusts to the width of the longest entry.

Minimum Field Length for Auto-Complete Search

- SysConfig setting: KIXServiceCatalog::Frontend::CommonSearchAutoComplete###MinQueryLength

This setting determines the minimum number of letters that have to be entered in the input field before auto-complete is carried out.

> ⓘ **Please note**
>
> This setting is required. Values from 1 to 9 are possible. Default value is "2".

Maximum Number of Results for an Auto-Complete Search

- SysConfig setting: KIXServiceCatalog::Frontend::CommonSearchAutoComplete###MinQueryLength

Use these settings to specify the maximum number of search results shown for the auto-complete search.

> ⓘ **Please note**
>
> This setting is required. Default value is "20".

Query Delay for Auto-Complete Search

- SysConfig setting: KIXServiceCatalog::Frontend::CommonSearchAutoComplete###QueryDelay

Use this setting to define the waiting period between two auto-complete searches.

> ⓘ **Please note**
>
> This setting is required. Default value is "100". Value must be greater than/equal to 10.

5 Additional Ticket Settings

5.1 Query of customer satisfaction

5.1.1 General note

The module for querying customer satisfaction when the ticket is closed is delivered inactive. Components are a new process, two generic agents, a notification and three dynamic fields. You can read how the commissioning and configuration is carried out in the section below.After activation, when a service process is completed, a notification is sent to the customer of the ticket containing a link to the ticket. Logged back into the customer front end, the ticket customer can now take part in a survey using the link in the sidebar and rate the quality of service.

A new window opens that contains two dynamic fields in which the survey values on the ticket are stored.

Once the survey has been completed, it is not possible to participate again. The agent can see the results on the ticket.

5.1.2 Installation

In order to be able to use the customer satisfaction query, you must activate two generic agents, a process and a notification.

To do this, proceed as follows:

- Open the admin area.
- Select "Ticket Notifications" and then set "Customer Satisfaction Survey" to "Valid".
- Now return to the admin area and open "Process Management". There you activate "SurveyProcess".
- Finally, in the "GenericAgent", "Survey Process - Abort Survey" and "Survey Process - Start Survey" must be set to "valid".

The customer satisfaction query can now be used when concluding a ticket.

5.1.3 Configuration

This section explains the configuration options for the survey in the SysConfig. You can find all relevant keys in the group "*Core :: SurveyProcess*" in the area "KIX Pro".

Ticket :: EventModulePost ### 500-SurveyProcessEnd
Restores any previously existing process / activity assignment if it was saved in other dynamic fields.

"EndStatusRegEx" refers to the status of the survey stored in the dynamic field "CustomerSatisfactionStatus".

SurveyProcess :: DynamicFieldProcessManagementProcessID

Defines which dynamic field is used to temporarily store the current process assignment.

SurveyProcess :: DynamicFieldProcessManagementActivityID

Defines which dynamic field is used to temporarily store the current process activity.

SurveyProcess :: DynamicFieldCustomerSatisfactionStatus

Defines which value is set in the dynamic field "CustomerSatisfactionStatus" when a ticket is selected for a survey. The stored value must match the configuration of the field.

SurveyProcess :: ParticipationProbability

Determines the probability with which a satisfaction survey will be assigned to a ticket. Only values between 0 and 100 are taken into account. The default is 100.

SurveyProcess :: ParticipationDuration

Defines how many days the satisfaction survey runs. The time starts when the survey process is assigned. The end is checked using a generic agent. The default is 21.

SurveyProcess :: ProcessID

Specifies the process ID of the survey process.

SurveyProcess :: ActivityID

Defines the start activity of the survey process.

5.2   Preview for Graphic Attachments in Article Lists

A preview for graphic attachments can be displayed in article lists.

It is possible to configure which attachments are permissible for the gallery based on the file extension. All other files will be ignored in the gallery.

This configuration can be managed in the SysConfig using the following keys:

- Ticket::Frontend::AgentTicketZoomTabArticle###AttachmentGallery
    - Activates the gallery in the article list
    - Default: no

- Ticket::Frontend::AgentTicketZoomTabArticle###GalleryPermission
    - Required permissions to use the attachment gallery in the agent interface.
    - Default: ro

- Ticket::Frontend::AgentTicketZoomTabArticle###GalleryDownloadable
    - Activates the download of the attachments in the gallery.
    - Default: no

- Ticket::Frontend::AgentTicketZoomTabArticle###GalleryAllowedFileExtensions
    - Defines the permissible file extensions that can be displayed in the gallery. The file extensions must be specified without the leading dot.
    - Default: png, jpg, jpeg, gif
    - Optional: pdf
        - As soon as the ending "pdf" has been added to the configuration, PDFs are also displayed in the gallery via IFrame.
        - **Note**: If Internet Explorer is used, an external PDF viewer that has browser support must be installed (e.g. Adobe).

5.3   Creating and Managing Ticket-Template Workflows

In this area you can create and manage workflows with ticket templates. You can create one or more attachment pools for each workflow, so that article attachments can be shared between the subtask tickets and main tickets. The configuration of a workflow comprises the following steps:

- Creating the required ticket templates
- Creating the workflow
- Creating the subtasks
- Defining the dependencies between the subtasks
- Defining the attachment pools

A ticket template is linked to each workflow. If an agent selects a workflow, the associated ticket template is loaded. A ticket template is also linked to each subtask. These ticket templates are used to create the subtask tickets in the background.

In the list you can see all of the ticket-template workflows defined in the system.

Figure: Ticket-Template Workflows

5.3.1 Adding a New Workflow

In *"Actions"* widget, click *"Add Workflow"* button. The following widget will open:
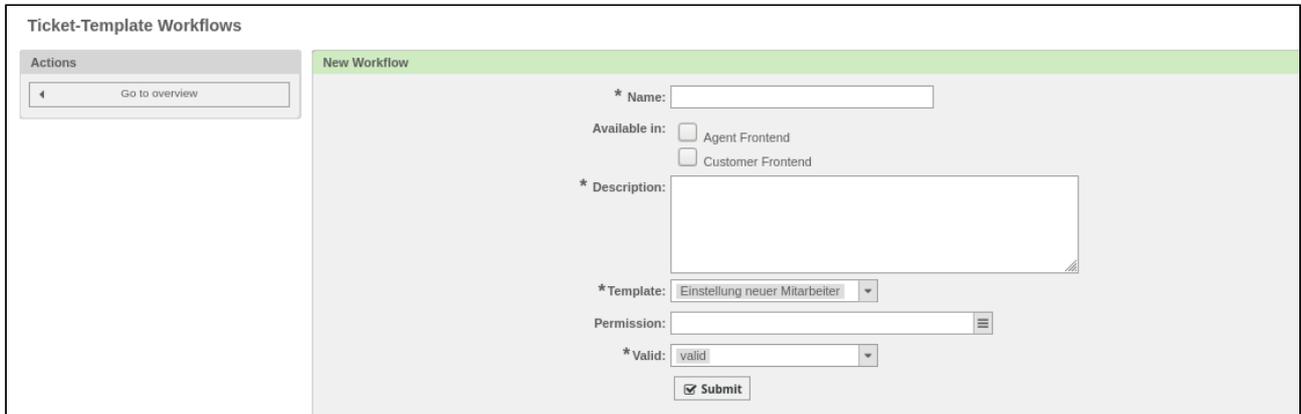
Figure: Add Workflow

Assign a name and a description. Under *"Available in"*, specify in which frontends you want the workflow to be available. Specify a ticket template. You also have the option to make the workflow available to just certain groups via the *"Permission"* field. Finally, click button *"Submit"*. The workflow will now be visible in the list as a new workflow.

If such a workflow is activated for the customer front end via the corresponding checkbox, further fields must be filled out.

- Select a customer portal group.
- Set the sorting. (optional)
- Store an icon. (optional)

Please note the following:

- The sorting should contain an alphanumeric value, according to which the order of the objects is then sorted in the display. Examples are '001' before 'A27'. If no value has been stored, '999' is assumed.

5.3.2 Editing Workflow

In the list of workflows, click the workflow you wish to edit in "Edit" column. The following widget will open:

Figure: Edit Workflow

In "Subtasks" table, you will see a list of the subtasks and associated dependencies that are linked to this workflow. In the "Attachment Pool" list, you will see a list of the attachment pools that are linked to this workflow. If the workflow was created as new, you will not yet see any subtasks in the tables.

Removing a Workflow

In the list of workflows, click symbol in "Delete" column.

> ⚠ **Attention**
>
> If you remove a workflow, all of the subtasks will also be deleted. All of the tickets involved in this workflow and its subtasks will lose the link to the workflow and its subtasks. This action cannot be reversed. The tickets will then use the ticket title, rather than the workflow/subtask names, to show linked tickets in the sidebar.

5.3.3 Creating a New Subtask

In "Actions" widget, click "Add Subtask" button. The following widget will open:
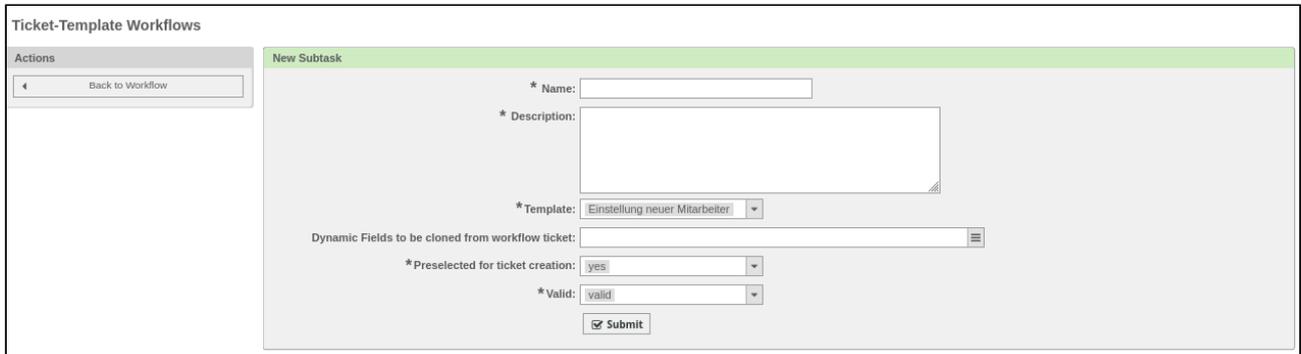
Figure: Create New Subtask

Assign a name and a description. Specify a ticket template. Here you also specify whether to copy any dynamic fields from the workflow ticket to the subtask ticket. The "Preselected for ticket creation (yes/no)" option determines whether the subtask should already be preselected when the workflow ticket is created.

Deleting a Subtask

In the list of workflows, select the workflow that contains the subtasks that you wish to delete. In the list "Subtasks", click symbol in "Delete" column.

> ⚠ **Attention**
>
> If you delete a subtask, any direct or indirect dependent subtasks will also be deleted. Any tickets involved in this subtask will lose the link to this subtask. This action cannot be reversed. The tickets will then use the ticket title, rather than the subtask names, to show linked tickets in the sidebar.

5.3.4 Creating Links between Subtasks

In the list of workflows, click the workflow that contains the subtasks that you wish to link to one another.
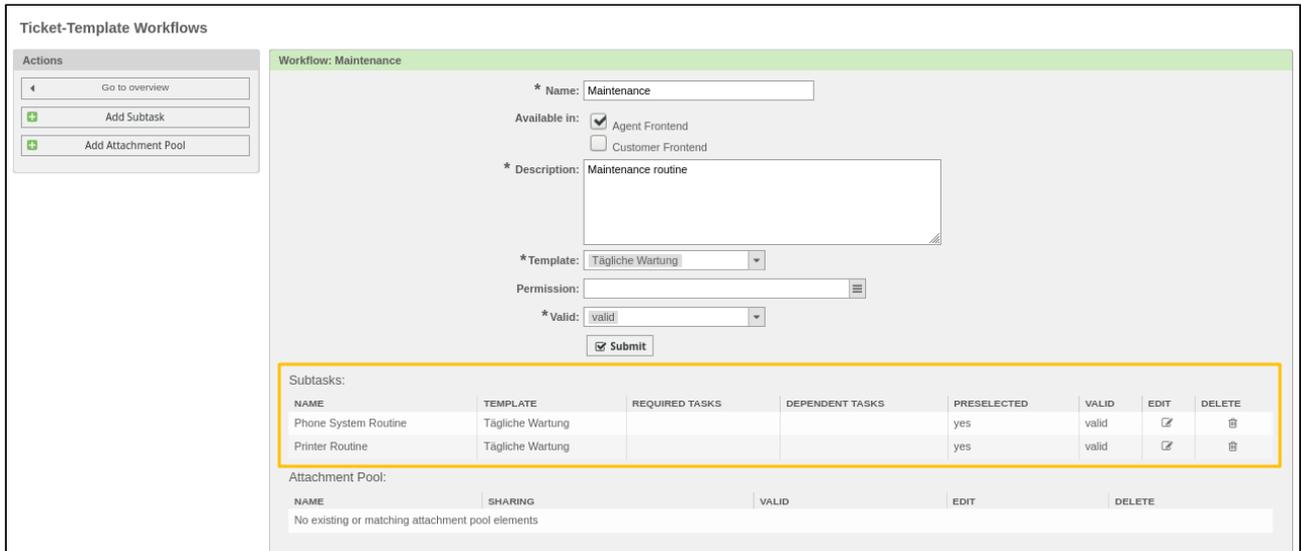
Figure: Subtasks in Workflow

In "Subtasks" table, click name of a subtask. This opens the following widget: "Subtask: <Title>". In the "Linked Subtasks" area you will see all of the tasks linked with this workflow.

In the lower area of the widget, you can now add a link to one (or more) required subtasks, or to a dependent subtask, to this subtask.

Figure: Create Link

Finally, click button "Submit".

5.3.5 Creating an Attachment Pool

In the list of workflows, click the workflow to which you wish to add an attachment pool.

Then click "Add Attachment Pool" in "Actions" widget.
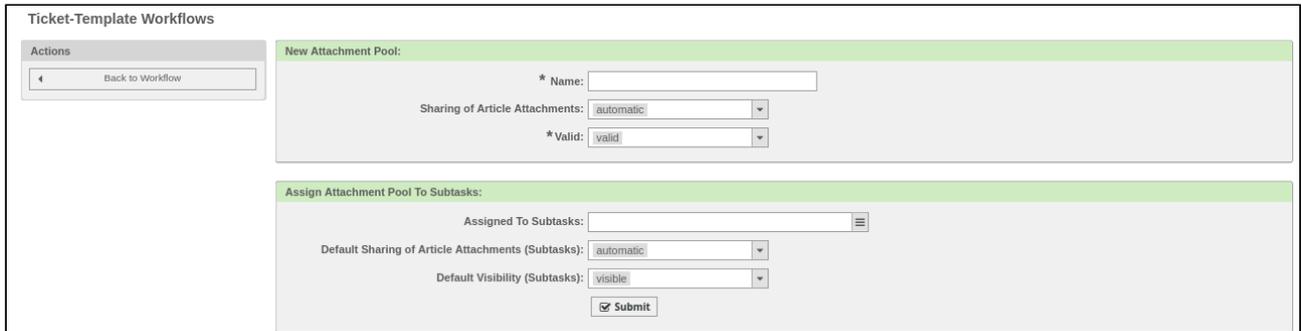
Ticket-Template Workflows	
Actions	**New Attachment Pool:**
◂ Back to Workflow	* Name: [ ]
	Sharing of Article Attachments: [automatic ▾]
	* Valid: [valid ▾]
	Assign Attachment Pool To Subtasks:
	Assigned To Subtasks: [☰]
	Default Sharing of Article Attachments (Subtasks): [automatic ▾]
	Default Visibility (Subtasks): [visible ▾]
	☑ Submit

Figure: Creating Attachment Pool

Assign a name and, under "Sharing of Article Attachments", specify whether the article attachments should be shared automatically or manually in the configured attachment pools. In the "Assign Attachment Pool To Subtasks" widget, you can select the subtask(s) that are to have access to the attachment pool. Under "Default Visibility (Subtasks)", you can specify whether the attachment pool should be visible in the "Workflow Attachments" tab.

5.3.6 Linking an Attachment Pool with a Subtask

In the list of workflows, select a workflow with an attachment pool. A widget with the workflow details will open.
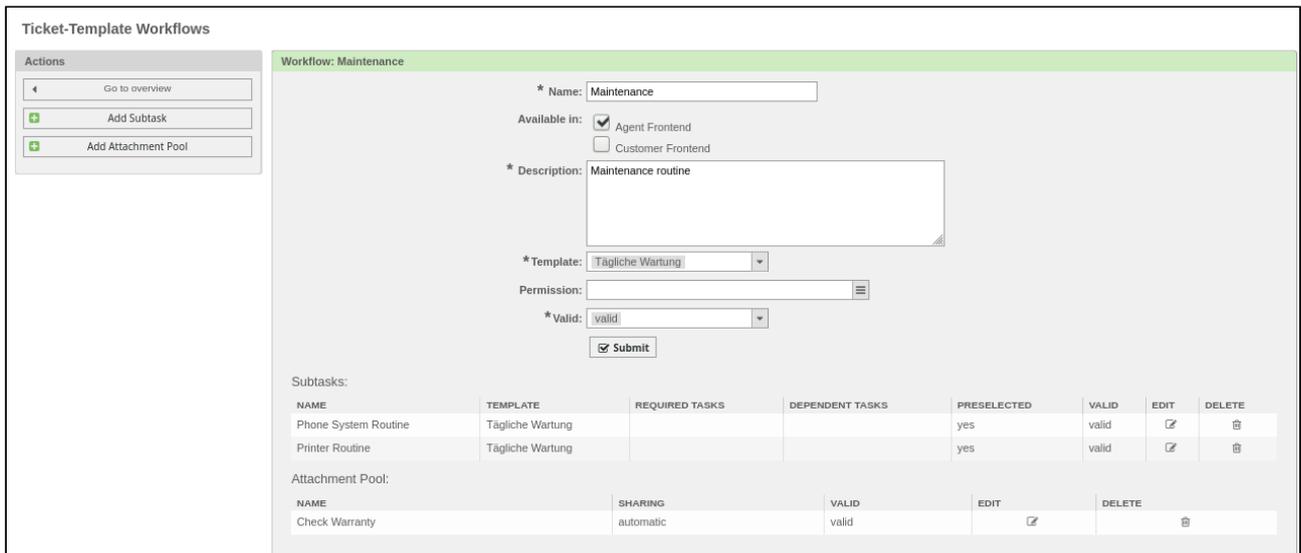
Ticket-Template Workflows								
Actions	**Workflow: Maintenance**							
◀ Go to overview	* **Name:** Maintenance							
➕ Add Subtask	**Available in:** ☑ Agent Frontend							
➕ Add Attachment Pool	☐ Customer Frontend							
	* **Description:** Maintenance routine							
	* **Template:** Tägliche Wartung							
	Permission:							
	* **Valid:** valid							
	☑ Submit							

Subtasks:

NAME	TEMPLATE	REQUIRED TASKS	DEPENDENT TASKS	PRESELECTED	VALID	EDIT	DELETE
Phone System Routine	Tägliche Wartung			yes	valid	✎	🗑
Printer Routine	Tägliche Wartung			yes	valid	✎	🗑

Attachment Pool:

NAME		SHARING	VALID	EDIT	DELETE
Check Warranty		automatic	valid	✎	🗑

Figure: Workflow Details

In the *"Subtasks"* list, click the subtask that you wish to link to the attachment pool.

A widget with the subtask details will open.

Ticket-Template Workflows

Actions	
◄	Go to overview
◄	Back to Workflow

Subtask: Printer Routine

* **Name:** Printer Routine

* **Description:** Printer Routine for Section 3a

* **Template:** Tägliche Wartung

Dynamic Fields to be cloned from workflow ticket:

* **Preselected for ticket creation:** yes

* **Valid:** valid

☑ Submit

▲ **Linked Subtasks**

NAME
No existing or matching workflow elements

▲ **Add required Subtasks**

☐ Select all

	NAME	LINKED AS
☐	Phone System Routine	

Add links

▲ **Add dependent Subtasks**

☐ Select all

	NAME	LINKED AS
☐	Phone System Routine	

Add links

▲ **Linked Attachment Pools**

☐ Select all

	NAME	SHARING OF ARTICLE ATTACHMENTS	VISIBILITY
☐	Check Warranty	automatic	👁

Delete links

▲ **Add Attachment Pool**

☐ Select all

	NAME
☐	Check Contract

automatic Assign Pool To Subtask

Figure: Linking an Attachment Pool with a Subtask

In *"Add Attachment Pool"* area, select attachment pool that you want to link to the subtask and click *"Assign Pool to Subtask"* button.

5.4 Expanded Checklists

Checklists help you with your work with special tickets. KIX Professional has expanded this functionality with two new features.

Firstly, the user can decide for themselves whether the checklist is to be shown in the sidebar or as an additional tab in the ticket zoom view. You can find the setting for this in the personal preferences in "Checklist" area. Secondly, all changes made to a checklist are logged in the ticket history.

The most important change is that generating or modifying a checklist generates a ticket event. This gives you the option to use generic agents or ticket notifications to trigger future (automated) actions.

In addition, KIX Professional registers the following new events:

ChecklistItemStateUpdate	This general event is triggered if the state of your checklist has changed.
ChecklistItemStateUpdate_open	This general event is triggered if the state of your checklist has changed to "open".
ChecklistItemStateUpdate_closed	This general event is triggered if the state of your checklist has changed to "closed".
ChecklistItemStateUpdate_pending	This general event is triggered if the state of your checklist has changed to "pending".
ChecklistItemStateUpdate_notok	This general event is triggered if the state of your checklist has changed to "not ok".

ⓘ **Please note**

At the moment, generic agents and the ticket notifications only "know" the ID of ticket where the checklist has been changed. It is not known which checklist element has been changed. Nevertheless, the events contain the relevant information internally, meaning that special event handlers (written code) can use this information to expand the options.

5.5   Calculating with Dynamic Fields

Dynamic fields can be used for calculations.

- To do so, create a dynamic field with the field type "Text" or "Dropdown".
    - For example: Text for calculating kilometer values
    - For example: Dropdown menu for various VAT classes

Calculation takes place in the background. Use the following SysConfig key for this

- `Ticket::EventModulePost###0101-TicketDynamicFieldCalculation01` - `Ticket::EventModulePost###0105-TicketDynamicFieldCalculation05`

Event	By default this field is filled with TicketDynamicFieldUpdate, but can also be limited to relevant fields. Example: (TicketDynamicFieldUpdate_(WorkTimeTotalOld| WorkTimeNormal)).
Function	Enter the calculation formula here.

ⓘ **Example**

<DynamicField_WorkTimeTotalOld>+<DynamicField_WorkTimeNormal>+<DynamicField_WorkTimeWeekend>+<DynamicField_WorkTimeNight>+DynamicField_WorkTimeTravelTime>+<DynamicField_WorkTimeGoodwill>

All ticket DFs that work with individual values can be used as placeholders. Multselect, RemoteDB, ITSMConfigItem, object reference are not supported. The name of the results field CANNOT be used here.

The following arithmetic operators are supported:

*. / (division with decimal places)

: (whole-number division)

% (modulo)

+ and -

Parentheses

ResultField	The field outputs the result.
DecimalSeparator	This field is used for separators for decimal figures. ⓘ **Information** If DecimalSeparator is not specified, the SysConfig key Ticket::Event::TicketDynamicFieldCalculation::DecimalSeparator is used.
DecimalPlaces	This field is used for decimal places. ⓘ **Information** If DecimalPlaces is not specified, the SysConfig key Ticket::Event::TicketDynamicFieldCalcula tion::DecimalPlaces is used.
ErrorField	If this field is specified, it is used to indicate errors during calculation.

> ⓘ **Note**
>
> The calculation is carried out using the operator precedence in this order:
> - Brackets
> - multiplication
> - Division (floating point)
> - Division (integer)
> - Modulo
> - total
> - subtraction
>
> There is no processing from left to right in the formula!
>
> **Example**: Calculating VAT
>
> ```
> <Amount> / 100 * <Tax rate>
> ```
>
> In this case, the tax rate is first multiplied by 100. This leads to a wrong result.
> By placing brackets you specify the correct order of the calculation:
>
> ```
> (<Amount> / 100) * <Tax rate>
> ```

5.6   Searching Attachments to Articles

5.6.1   General Settings Before First Use

- If using KIX with Ubuntu: So that the search functions correctly, the following modifications in the "policy.xml" file from "ImageMagick" are necessary:
    - PDF rights: <policy domain="coder" rights="none" pattern="PDF" /> to <policy domain=" coder" rights="read" pattern="PDF" />
    - Free hard disk space: change <policy domain="resource" name="disk" value="1GiB"/> to <policy domain="resource" name="disk" value="10GiB"/>

5.6.2   Initial Indexing of Existing Attachments

Searching in article attachments is initially carried out only in tickets or articles which were created after installation of KIX Pro with this feature.

If you would like to search tickets which were created before installation, run the following script:

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

Please note that if there are already a large number of tickets in your system, running the script may severely impact the system.

Therefore, to limit time periods, use the following parameters:

ticket-newer (YYYY-MM-DD)

ticket-older (YYYY-MM-DD)

5.6.3   Indexing New Attachments

The SysConfig key "Ticket::EventModulePost###099-ArticleAttachmentIndex" indicates for which events in the system the index for available attachments should be supplemented.

5.6.4   Activation and Deactivation of Backends

Under the SysConfig key "Ticket::AttachmentSearchIndex::Backend###", you can find the available backends.

The "FileExtensions" attribute indicates which file types are to be searchable with which backend.

5.7   Conversation Guides

5.7.1   Creating and Managing Conversation Guides

In this area you can create and manage conversation guides for agents. The conversation guides defined in the system are shown in the "List" widget.

It is possible to set the replies to questions in the conversation guide as attributes of tickets and articles. You can integrate created conversation guides when creating a new ticket.
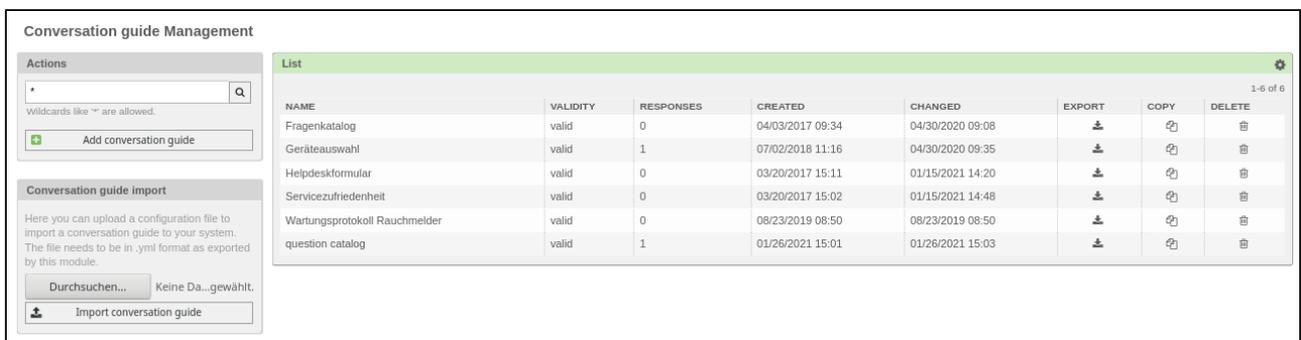
Figure: Conversation Guide Management

5.7.2   Creating a New Conversation Guide

In *"Actions"* widget, click *"Add conversation guide"* button. The following widget will open:
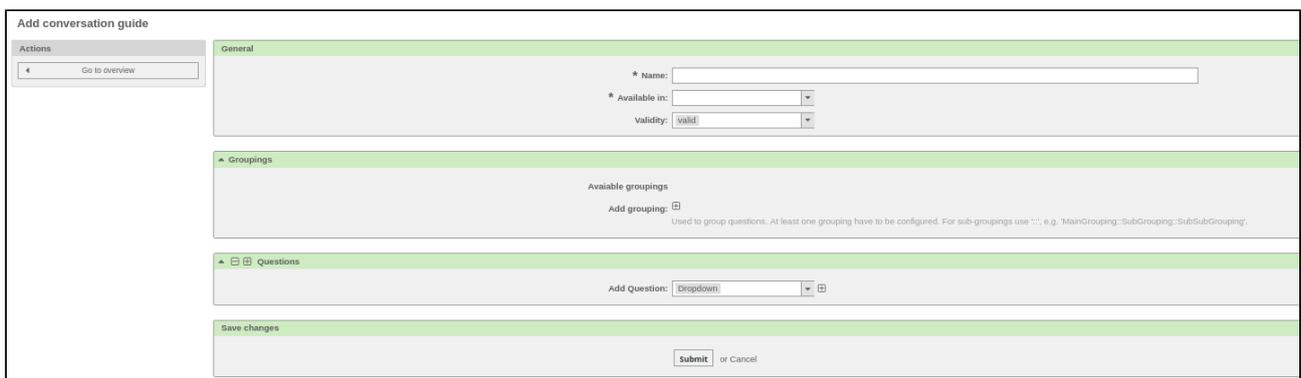
Figure: Adding Conversation Guide

Assign a name to the guide in the "General" area. Use the "Available in" field to specify where the discussion guide should be available: "Agent front end" / "Customer front end" / "Agent and customer front end". Activate the guide by setting it to "valid".

In the "Groupings" area use the sign to add at least one grouping for the questions in the conversation guide. The use of sub-groupings for the questions is possible. For subgroups you have to use a "::" (e.g.: MainGrouping::SubGrouping::SubSubGrouping).

In the "Questions" area you can add questions to the discussion guide. Select a response type from the drop-down list. If a questionnaire becomes long and therefore confusing, you can fold it in using the "Minus" button. This makes it easier to edit.

The following answer types are possible (in the figure you can see how they will be shown later in the conversation guide):

Dropdown

The answers can be supplied as a dropdown list of predefined values.

Multiselect

The answers can be supplied as a multiselect list of predefined values.

Text

The answers can be entered as text here.

Textarea

The answers can be entered as text across multiple rows here.

Date

The answer can be entered as a date here.

DateTime

The answer can be entered as a time and date here.

Radiobutton

The answer can be supplied as one or more predefined values using a radiobutton.

Checkbox

The answer can be supplied as one or more predefined values using a checkbox.

InfoText

This is not a response in the proper sense, but can be used as infotext for the conversation thread.

Spinner

The answer can be supplied as one or more predefined values using a spinner.

Once all the responses to the questions have been entered, a new ticket is created with a summary of the responses to the questions.

> ⓘ **Hint**
>
> When sending an article that includes an interview guide, it is always included at the bottom of the email. This is due to the fact that the system combines the individual components of a message (content, signature, discussion guide). The order cannot be influenced by the admin.

5.7.3 Follow-up Questions

A guide can be structured to include follow-up questions. Enter them into the system as follows:

In the main question, different values must be available as possible answers. There is a "follow-up question" connection field for each answer option.
The follow-up question is created in the system just like the main question, and the follow-up question field (in the main question) is populated only with the number of the question.

Figure: Selection of follow-up question(s) based on answer values

> ⓘ **Notices**
>
> - When sending an article that includes an interview guide, it is always included at the bottom of the email. This is due to the fact that the system combines the individual components of a message (content, signature, discussion guide). The order cannot be influenced by the admin.
>
> - If you activate the discussion guides for e-mail tickets, the table with the result of the guide is displayed in the article in KIX, but is missing in the e-mail sent.
>   This is due to the way the process is processed by the system, in which the data from the discussion guide is only appended to the article after it has been created.
>
>   Tip: In order to send a customer information from the ticket that you have previously filled out, we recommend using dynamic fields and placeholders.

5.7.4 Versioning of discussion guides

In order to edit or update an existing discussion guide, there is the option of versioning. This means that you provide the agent or customer with the latest version of the guide when creating a new ticket with an integrated discussion guide.

- Go to the "Ticket Settings" block in the admin area and click on "Conversation Guidelines".
- Select the conversation guide you want to edit and click on it.
- Now click on the "Create new version" button, which is located in the "Actions" widget on the left edge of the screen.

  Attention: The button only appears if there is at least one answer to the existing version of the conversation guide. If there are still no answers to a discussion guide, it will "only" be processed. No new version is created. This can lead to inconsistent data.

- Edit the discussion guide as required and click on "Create new version" at the end.
  The new version has been created.

When the new version is created, the number of answers given is set to "0". The number of answers given in the overview therefore always relates to the most current version.

If an agent creates a new ticket including a discussion guide, the version of the discussion guide that is the most current at the time of creation is always used.

ⓘ **Information**

Older versions of the edited conversation guide, which are still used in tickets, including their answers, can still be viewed in the agent front end and are still used when the ticket is processed.

5.7.5 Conversation Guide for 1st Level Support

To configure settings for this function, select "KIX Pro" group in SysConfig. After page has reloaded, select subgroup: *Frontend::Agent::Preferences.*

Number of Conversation Guides in the List

- SysConfig setting: PreferencesGroups###ConversationGuideOverviewPageShown

This setting configures the number of conversation guidelines displayed per page in the list in the Admin area.

> ⓘ **Please note**
>
> Default values are "10" to "35" (in increments of 5). Pre-selected default value is "25".

Initially Collapsing and Expanding Groupings of a Conversation Guide

Select subgroup Core::ConversationGuide

- SysConfig setting: ConversationGuide::DesignOutput###Expanded

Use this setting to define whether the groupings of a conversation guide are initially collapsed or expanded. Default value is "expand".

Values for Spinner Button

- SysConfig setting: ConversationGuide::DesignOutput###SpinnerButton

Use this setting to define which values for increasing/decreasing values are selectable for spin buttons.

5.7.6 Conversation guidelines selection in the ticket views based on templates and actions

Conversation guidelines can be linked to templates and, if necessary, certain actions via a filter.

To configure this, select the "KIX Pro" group in SysConfig. After the page has reloaded, select the subgroup: *Frontend :: Agent.*

- SysConfig setting: *Frontend :: Output :: FilterElementPre ### ConversationGuide*

This key can be used to store output filters that display selected conversation guides in the ticket views. These output filters generally work on the basis of the templates.

If a listed template is used, the specified module is used. The module receives the complete configuration and also checks whether one of the actions listed has currently been requested.

⚠️ Templates are not tied to the actions. Actions can use templates in any way. It is therefore sometimes necessary to double-check this in order to avoid incorrect behavior.

Practical example:

The "AgentTicketPhoneCommon" template is active ("1") and addresses the telephone module. The "AgentTicketPhoneOutbound" action is also active ("1"). If an agent calls a customer via the system in their day-to-day work, they are automatically provided with a conversation guide (stored as such) in the ticket view. If, on the other hand, the customer calls the agent, the conversation guide does not appear because the "AgentTicketPhoneInbound" action was not created in the filter.

5.8 Automatic Assignment of Owners/Responsible Persons

Agents frequently forward on emails to KIX. If a new ticket is created from an email, the system can check whether an agent exists for the sender who is authorized for the applicable queue. If so, this agent is to be automatically set as the owner and/or responsible person. A ticket lock is not necessary here.

Requirements are:

- There is a ticket customer with a login and an agent with the same login.
- The agent has at least read permission for the queue in which the ticket is to be created.
- The event module "Ticket::EventModulePost###900-AssignedOwnerResponsible" must be active.
- Automatic assignment is activated in the agent's personal preferences.

Automatic assignment can be activated and deactivated in the agent's personal preferences.

• Default: deactivated
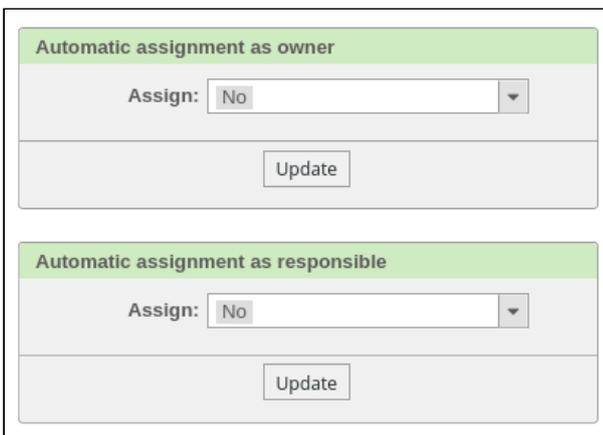
Figure: Personal Preferences

5.9   Adjustments in the ticket templates

With KIX Pro there are adjustments in the ticket template configurator. The difference to KIX Start is marked with a yellow border in the figure below.

You can now:

- Assign customer portal groups
- Determine the sorting in the display in the customer frontend
- Store an icon for the template
- Include a discussion guide

Please note the following:

- The sorting should contain an alphanumeric value, according to which the order of the objects is then sorted in the display. Examples are '001' before 'A27'. If no value has been stored, '999' is assumed.

Figure: Adjustments in the ticket templates for KIX Pro

5.10 Widespread Incident

To configure settings for this function, select "KIX Pro" group in SysConfig.

After page has reloaded, select one of the subgroups "Core::Ticket" or
"Frontend::Agent::Ticket::ViewCreateWideSpreadIncident".
In "Core::Ticket" group are the following settings:

- Ticket type for widespread incident feature
- Child ticket types for widespread incident feature
- Dynamic field for widespread incident feature
- Hiding all child tickets of a widespread incident
- Copying forwarded articles of a widespread incident ticket to child ticket
- Event module for copying
- Restricting functions of a package
- Creating new widespread incident ticket
    - Priority
    - Article type
    - Sender type
    - Subject
    - Content
    - Ticket state
    - Ticket state types
    - Dynamic fields
    - History type
    - History comment

Ticket Type for Widespread Incident Feature

- SysConfig setting: WideSpreadIncident::TicketType

Use this setting to specify ticket type for widespread incidents. Setting is used to highlight a ticket as a widespread incident.

Please note: This setting is required. Default value is "Widespread Incident". This ticket type was created during installation of package.

Child Ticket Types for Widespread Incident Feature

- SysConfig setting: WideSpreadIncident::ChildTicketTypes

Use this setting to specify child ticket type for widespread incidents.

Please note: This setting is required. Default value is "Widespread Incident". This ticket type was created during installation of package.

Dynamic Field for Widespread Incident Feature

- SysConfig setting: WideSpreadIncident::DynamicField

This setting specifies name of dynamic field for widespread incident. It is used to mark a child ticket and saves the ID of a widespread incident for copying.

Please note: This setting is required. Default value is "Widespread Incident". This ticket type was created during installation of package.

Hiding All Child Tickets of a Widespread Incident

- SysConfig setting: WideSpreadIncident::DynamicField

This setting defines a dynamic field which can be used to leave all other tickets visible, while child ticket of a widespread incident is invisible, as long as the setting is activated.

Please note: This setting is required. Default value is "Widespread Incident". This ticket type was created during installation of package.

Before activating setting, it is mandatory to run

```
KIX-Home/bin/kix.Console.plMaint::Ticket::SetVisible VisibleTicket
```

otherwise all other tickets which were created after installation of KIX Professional are also invisible.

Copying Forwarded Articles of a Widespread Incident Ticket to Child Ticket

- SysConfig setting: WidespreadIncident::CopyForwardedArticlesToChildren

This setting allows a forwarded article of a widespread incident to be copied to its child ticket. In default setting (disabled), forwarded articles are not copied to the child ticket of a widespread incident ticket.

Please note: This setting is required. Default value is "Widespread Incident". This ticket type was created during installation of package.

Event Module for Copying

- SysConfig setting: Ticket::EventModulePost###0100-WidespreadIncident

This setting registers event listener for copying. In default setting, the following is copied from a widespread incident ticket to its child ticket:

- Newly created and sent articles
- Ticket state and locked state updates
- Priority changes
- Changes to responsible person and owner
- Pending time updates
- Queue changes

Please note: This setting is required. Default value is "Widespread Incident". This ticket type was created during installation of package.

Restricting Functions of a Package

- SysConfig setting: WidespreadIncident::Restrictions

This setting allows you to configure a number of restrictions for package function. There are four possible restrictions:

- Queue: used to filter out possible child tickets during widespread incident creation in ticket overviews.
- ArticleType: used for copying during article creation.
- State: used for copying of state changes.
- StateType: used for copying of state changes.

Value for "Content" should be valid, e.g. "open" for "State" or "Raw" for "Queue". Multiple values should be separated by a comma or a semicolon.

5.10.1 Creating New Widespread Incident Ticket

In subgroup "Frontend::Agent::Ticket::ViewCreateWidespreadIncident" are the following settings:

Creating New Widespread Incident Ticket: Priority

- SysConfig setting: Ticket::Frontend::AgentTicketCreateWidespreadIncident###Priority

Use this setting to specify default priority for new widespread incident ticket in agent frontend.

Please note: This setting is required. Default value is "3 normal". Setting does not apply to "New ticket" action in "Tickets" menu.

Creating New Widespread Incident Ticket: Article Type

- SysConfig setting: Ticket::Frontend::AgentTicketCreateWidespreadIncident###ArticleType

Use this setting to specify default article type for new widespread incident ticket in agent frontend.

Please note: This setting is required. Default value is "phone". Setting does not apply to "New ticket" action in "Tickets" menu.

Creating New Widespread Incident Ticket: Sender Type

- SysConfig setting: Ticket::Frontend::AgentTicketCreateWidespreadIncident###SenderType

Use this setting to specify default sender type of first article in new widespread incident ticket.

Please note: This setting is required. Default value is "customer". Setting does not apply to "New ticket" action in "Tickets" menu.

Creating New Widespread Incident Ticket: Subject

- SysConfig setting: Ticket::Frontend:AgentTicketCreateWidespreadIncident###Subject

Use this setting to specify default subject of first article of new widespread incident ticket.

Please note: This setting is required. Setting does not apply to "New ticket" action in "Tickets" menu.

Creating New Widespread Incident Ticket: Content

- SysConfig setting: Ticket::Frontend::AgentTicketCreateWidespreadIncident###Body

Use this setting to specify default body text for first article of a widespread incident ticket.

Please note: This setting is required. Setting does not apply to "New ticket" action in "Tickets" menu.

Creating New Widespread Incident Ticket: Ticket State

- SysConfig setting: Ticket::Frontend::AgentTicketCreateWideSpreadIncident###StateDefault

Use this setting to specify default state of new widespread incident ticket.

Please note: This setting is required. Default value is "open". Setting does not apply to "New ticket" action in "Tickets" menu.

Creating New Widespread Incident Ticket: Ticket State Type

- SysConfig setting: Ticket::Frontend::AgentTicketCreateWideSpreadIncident###StateType

Use this setting to specify possible ticket state types for new widespread incident ticket.

Please note: This setting is required. Default values are "open" / "pending auto" / "pending reminder" / "closed". Setting does not apply to "New ticket" action in "Tickets" menu.

Creating New Widespread Incident Ticket: Dynamic Fields

- SysConfig setting: Ticket::Frontend::AgentTicketCreateWideSpreadIncident###DynamicField

Use this setting to specify which dynamic fields are shown in "New widespread incident ticket" dialog. Possible values for "Content" are "0" = deactivated" and "1" = activated and "2" = activated and mandatory field.

Please note: in default version, no dynamic fields are activated. Setting does not apply to "New ticket" action in "Tickets" menu.

Creating New Widespread Incident Ticket: History Type

- SysConfig setting: Ticket::Frontend::AgentTicketCreateWideSpreadIncident###HistoryType

Use this setting to specify type of history item for new widespread incident ticket.

Please note: this setting is required. Default value is "PhoneCallCustomer".

Creating New Widespread Incident Ticket: History Comment

- SysConfig setting: Ticket::Frontend::AgentTicketCreateWideSpreadIncident###HistoryComment

Use this setting to specify history item comment for new widespread incident ticket.

Please note: This setting is required. Setting does not apply to "New ticket" action in "Tickets" menu.

5.11   Queue Settings - Scheduled automatic replies

You can send auto notifications that are limited to a certain period of time (e.g. Christmas holidays). These time-based answers only take effect in the time period you have specified. Outside the configured period, no more auto-responses are / will be sent.
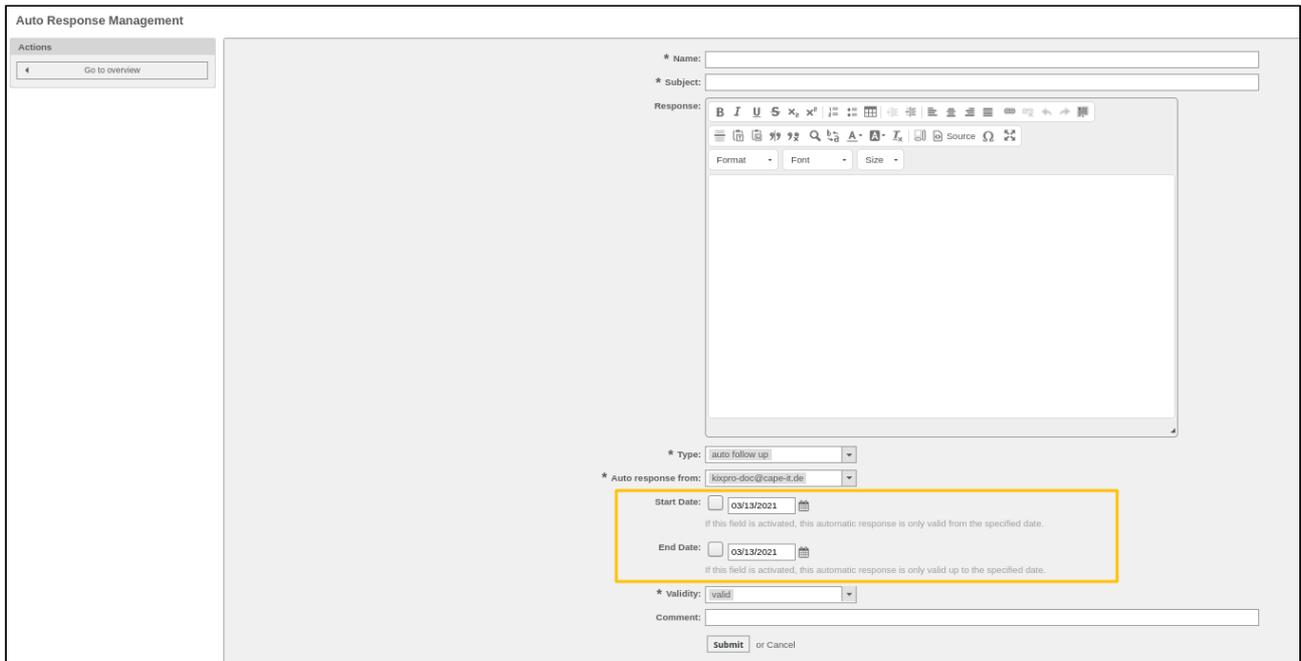
Figure: Automatic reply management

You can set two times when creating and editing an auto-answer. These time specifications determine from or / and until when this auto-response is to be used. These times are not mandatory and can remain deactivated if the auto answer should always be used.

If a start date has been set, the auto-answer is actually effective from this date (from 00:00 o'clock). If an end date has been set, the auto-answer is only effective up to this date (until 23:59 o'clock). If both the start and end date are set, the auto-answer is only effective during this period.

To deactivate the times, it is sufficient to remove the check mark from the checkbox in front of the date field. To activate the selected period, the checkbox in front of the respective date field must be ticked.

5.12 Displaying attachments from dynamic fields

You can configure the view in the ticket detail view for the 'Attachments' tab so that attachments from dynamic fields are also displayed.

Go to the 'Dynamic fields' menu item in the admin module. In the "Actions" widget on the left-hand side of the screen, select the field type 'Attachment' from the drop-down menu under "Ticket".
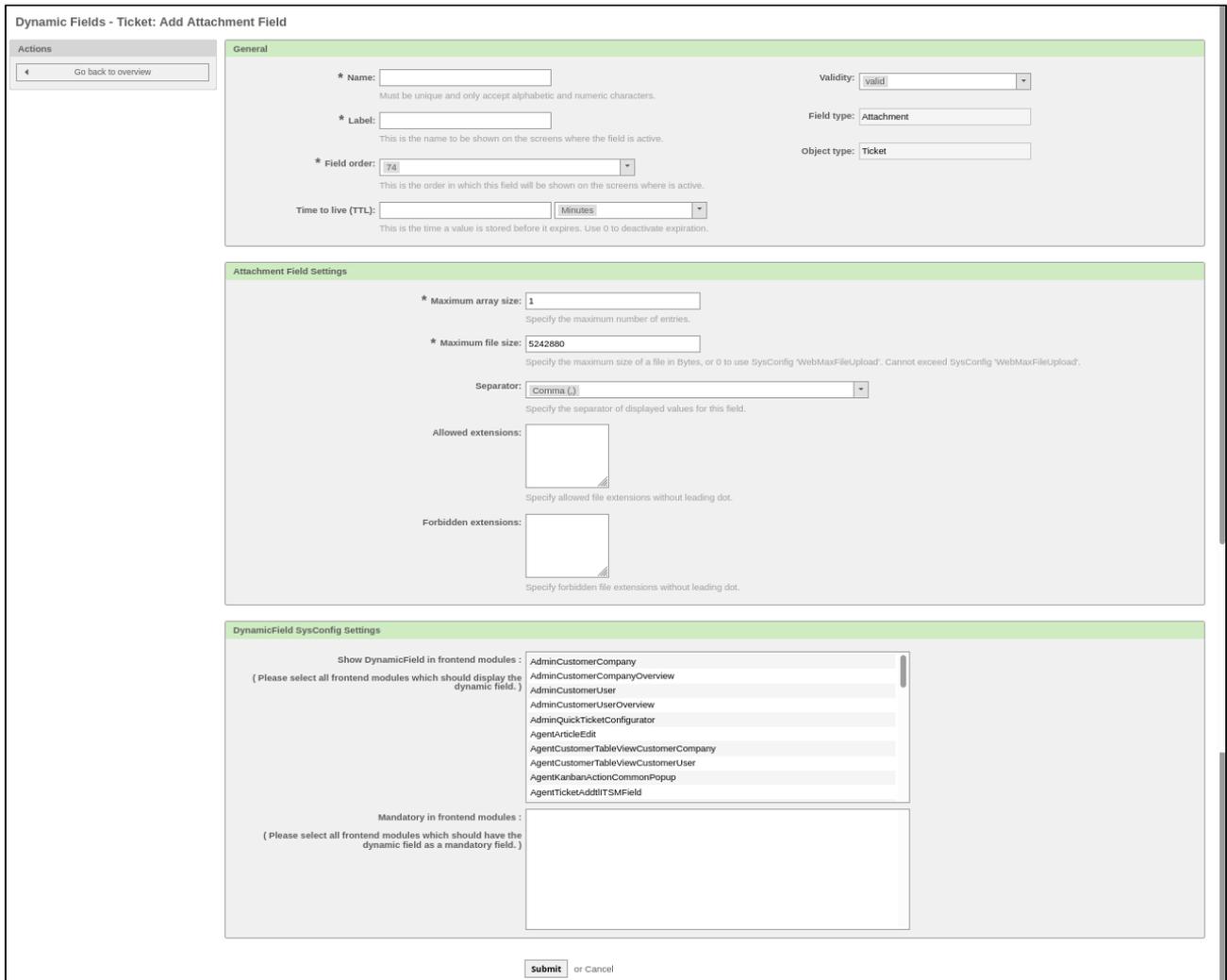
Fig .: Adding the field type 'Attachment' to the ticket

General	Fill in all relevant fields. Note that only valid fields are displayed.
Attachment Field Settings	Set restrictions on the attachment(s) to be uploaded.
SysConfig settings for the dynamic field	Select the front-end modules in which the dynamic field should be displayed. (Multiple choices possible) You also have the option of determining in which front-end modules this dynamic field should be a mandatory field.

Click on "Submit" to confirm your selection.

5.13   Configure announcements from tickets

With the ticket-related announcement (TicketAnnouncement) you have the possibility to display a message from a ticket (similar to a message) right after logging into the customer frontend, e.g. in the case of an incident that affects several customers. Customers who want to report an incident can quickly see whether this is already known. An overproduction of incident tickets can be avoided in this way.

5.13.1   Step 1: Configuration of the SysConfig keys to TicketAnnouncement

The relevant keys are configured in the *SysConfig*. To do this, go to the *KIXPro* group and then to the *Core::Ticket::TicketAnnouncement* subgroup.

- SysConfig Key: *TicketAnnouncement###Types*
  - This setting determines which tickets with which ticket types can display a ticket message in the customer frontend.
- SysConfig Key: *TicketAnnouncement###StateBlacklist*
  - In this setting, you define a blacklist that defines which tickets with which ticket status do not display a ticket notification in the customer frontend.
- SysConfig Key: *TicketAnnouncement###MessageConfig*
  - In this key, you configure additional parameters for displaying the notification messages in the customer frontend for each selected ticket type.
- SysConfig Key: *TicketAnnouncement###MessageDefault*
  - In this key, define the default values for displaying the ticket message in the customer frontend. Parameters such as B. prefix, ticket number and color can be determined.

5.13.2   Step 2: Enable Dynamic Fields

You need dynamic fields to determine the general conditions such as the duration and type of display of the ticket announcement. You can find these by default in the overview of dynamic fields. Set the required fields to "valid" and display them in a mask of your choice (e.g. the tab for dynamic fields in the "Edit ticket" mask) in order to be able to use the TicketAnnouncement.

The following three dynamic fields are important for this:

Dynamic Field	Description
KIXTicketAnnouncementCheck	Here you determine whether a message should be displayed in the customer front end. The default value of the field is "No".

Dynamic Field	Description
KIXTicketAnnouncementDisplay	Specify how the message should be displayed. • OnePerDay -> Displays the message until the customer closes it. The message is <u>displayed once a day.</u> • OnlyOne -> Displays the message <u>until the customer closes it</u>. The message is only displayed for so long. • Ever -> The message is <u>always displayed</u> and cannot be closed by the customer. The default value of the field is "OnlyOne".
KIXTicketAnnouncementDuration	Enter how many days the message should be displayed. "0" stands for infinitely long and is also the default value.

⚠️ **Please note:** The preconfigured values of the dynamic fields must not be changed, as the functionality is tailored to them.

5.13.3 Step 3: Other configurations

In order to display the message, further configurations must be activated. To do this, go to the SysConfig.

SysConfig Keys	Description
Frontend::Output::FilterElementPre###CustomerTicketAnnouncement	With this output filter you activate the display of the messages in the customer front end. Actions: • CustomerTicketOverview • CustomerTicketTemplates ⚠️ This key is disabled by default and you must enable it!
Ticket::Acl::Module###500-TicketAnnouncement	This key provides an ACL that shows or hides the dynamic fields. Standard templates: • AgentTicketPhone • AgentTicketEmail • AgentTicketNote ⚠️ This key is disabled by default and you must enable it!

SysConfig Keys	Description
Reset data if necessary:	
Ticket::EventModulePost###990-TicketAnnouncementReset	Behind this key is an event which deletes the customer's settings when the message is deactivated (by the agent) on the ticket. ⚠️ This key is disabled by default and you must enable it!
Daemon::SchedulerCronTaskManager::Task###TicketAnnouncementReset	This key resets the customer's settings daily (only occurs with the "OnePerDay" setting). ⚠️ This key is disabled by default and you must enable it!

5.13.4 Create ticket announcement

The agent can now enter the ticket announcement in the ticket.

Fig.: Dynamic fields in the ticket with default values

5.14   Display of Duplicates when Creating a Ticket

In order to avoid unnecessary duplicates when creating tickets, you can search for the same words when entering the title. This function is set in the SysConfig.

To do this, go to the *KIXPro* group in the *SysConfig* and there to the *Core::TicketDuplicate* subgroup.

Key	Explanation
DuplicateTicketSearch###ColumnHeader	• Contains the general ticket data that is displayed in the ticket duplicate table. • Possible settings: 　　• Key: \<priority\>:::\<attribute\>:::\<mark as link\>; 　　• Value: 0 = Disabled, 1 = Available. • Note: Only ticket attributes without dynamic fields are allowed. • Default: 　　• 0100:::TicketNumber:::Link -> 1 　　• 0200:::Title -> 1 　　• 0300:::State -> 1
DuplicateTicketSearch###Queues	• Determines in which queues the search for duplicates should be restricted. • Note: Entry is not mandatory, the form field can be left empty.
DuplicateTicketSearch###StateTypes	• Sets the status types for finding duplicate tickets. If no status types are selected, the search includes all types. • Note: Entry is not mandatory, the form field can be left empty. • Default: 　　• 'new', 'open', 'pending reminder', 'pending auto', 'closed'
DuplicateTicketSearch###TicketCreateTimeNewerMinutes	• Determines the maximum age of a ticket for the search. • Note: The time must be entered in minutes. • Default: 365 days > 525600 minutes
DuplicateTicketSearch###Types	• Specifies the ticket types for searching for duplicate tickets. If no ticket types are selected, the search includes all types. • Note: Entry is not mandatory, the form field can be left empty.

Key	Explanation

DuplicateTicketSearch###IgnoreWords	• Customizable list of don't care words. The stored words are ignored when searching for duplicates.
	• Default:
	     • ::
	     • ?
	     • *
	     • '

DuplicateTicketSearch###TicketShown	• Defines the number of tickets to be displayed in the results table. • Default: 10
DuplicateTicketSearch###MinQueryLength	• Specifies the minimum number of characters before the search becomes active. • Default: 3
DuplicateTicketSearch###QueryDelay	• Specifies the delay for the search. • Note: The time must be specified in milliseconds. • Default: 1000
Frontend::Output::FilterElementPost###100-DuplicateTicketSearch	• OutputFilter to initialize the search for duplicate tickets • Actions: • AgentTicketPhone • Note: The OutputFilter must be activated to use the duplicate search. It is disabled by default.

> ⚠ **Note**
>
> Depending on the configuration, the search for duplicates can limit performance somewhat.

6 Configuration Management Database (CMDB) Area

6.1 Optimized CMDB

KIX Professional comes with optimized, internal CMDB structures and algorithms – comparable with KIX. With this optimized CMDB, it is possible to increase the maximum number of CIs to several million, without compromising on performance. There are no changes to the KIX GUI. No settings have to be made in the SysConfig for this function.

6.2 CMDB Explorer

To configure settings for this function, select "KIX Professional" group in SysConfig. After the page has been reloaded, select sub-group "Frontend::Agent:: ViewCMDBExplorer".
When installing KIX Professional, a new group, "CMDB Explorer" will be created.

Required Group Permissions

• SysConfig setting: ITSMConfigItem::Frontend::AgentITSMCMDBExplorer###Permission

You can specify here which permissions a user from "CMDB Explorer" group must have, in order to be able to call up CMDB Explorer. In default version, user must have reading permissions (ro).

Visible Columns in List View of a ConfigItem

• SysConfig setting: ITSMConfigItem::Frontend::AgentITSMCMDBExplorer###ShowColumns

Use these settings to specify which columns are to be shown in CMDB Explorer list view, if a ConfigItem is selected in tree view.

Please note: only used for initial configuration. If a user changes columns displayed in list view, this initial configuration is no longer relevant.

• SysConfig setting: ITSMConfigItem::Frontend::AgentITSMCMDBExplorer###ShowColumns

Use these settings to specify which columns are to be shown in CMDB Explorer list view, if a ConfigItem is selected in tree view.

Visible Columns in List View of a ConfigItem Class

• SysConfig setting: ITSMConfigItem::Frontend::AgentITSMCMDBExplorer###ShowColumnsByClass

Use this setting to specify visible columns of ConfigItems depending on ConfigItem class in CMDB Explorer list view. Entries must begin with class name followed by two colons.

There are a few CI attributes which are the same for all CIs (e.g. for computer class: "Computer::Name", "Computer::CurDeplState", "Computer::CreateTime"). In order to be able to display individual CI attributes (as they are defined in CI definition), these must be specified as follows (e.g. for computer class): "Computer::HardDisk::1", "Computer:: HardDisk::1::Capacity::1", "Computer::HardDisk::2", "Computer::HardDisk::2::Capacity::1".

If there are no entries for a CI class, default columns are used from "ITSMConfigItem::Frontend::AgentITSMConfigItem###ShowColumns".

<u>Please note:</u> setting is deactivated by default. The setting is only used for initial configuration. If a user changes columns displayed in list view, this initial configuration is no longer relevant.

Search Depth of Link Graph

- SysConfig setting:
  ITSMConfigItem::Frontend::AgentITSMCMDBExplorer###LinkGraphMaxSearchDepth

Use this setting to specify maximum search depth for link graph. Default value is "1".

Adjusting Strength of Link Graph

- SysConfig setting:
  ITSMConfigItem::Frontend:AgentITSMCMDBExplorer###LinkGraphAdjustingStrength

Use this setting to specify maximum adjusting strength of link graph. Strength determines effort the adjustment algorithm puts in to prevent overlapping elements. Default setting is "weak".

Relevant Link Types of Link Graph

- SysConfig setting:
  ITSMConfigItem::Frontend::AgentITSMCMDBExplorer###LinkGraphRelevantLinkTypes

Use this setting to specify link types which are to be shown in link graph. Default values are "AlternativeTo, Includes, DependsOn, RelevantTo, ConnectedTo".

Relevant Classes for Link Graph

- SysConfig setting:
  ITSMConfigItem::Frontend::AgentITSMCMDBExplorer###LinkGraphRelevantCIClasses

Use this setting to determine list of CI classes which are to be used in link graph. If setting is deactivated or there are no values in input field, all CI classes are used.

Allowed ConfigItem Actions in ConfigItem Zoom View

- SysConfig setting:
  ITSMConfigItem::Frontend::AgentITSMCMDBExplorer###DetailViewAllowedMenuModules

Use these settings to specify available actions (buttons) in ConfigItem zoom view.

<u>Note:</u> Please only change setting if absolutely necessary.

Icons for ConfigItem Classes in Tree View

- SysConfig setting: ITSMConfigItem::Frontend::AgentITSMCMDBExplorer###TreeViewClassIcons

Use this setting to specify icons for display of ConfigItem classes in tree menu. If you would like to add a new entry, copy image file into following folder:

"/opt/kix/var/httpd/htdocs/skins/Agent/default/img/"

Name of image file must begin with:

"KIXCMDDExplorer"_

For entry in SysConfig setting, only the name without "KIXCMDDExplorer"_ prefix needs to be given. Image files must be at least 16x16 pixels in size.

Default Icon in Tree View

- SysConfig setting:
  ITSMConfigItem::Frontend::AgentITSMCMDBExplorer###TreeViewClassIconDefault

Use this setting to specify which icon is shown for a ConfigItem class, if no other ConfigItem icon was defined for said class. If you would like to change icon, copy image file into following folder:

"/opt/kix/var/httpd/htdocs/skins/Agent/default/img/"

Name of image file must begin with:

"KIXCMDDExplorer"_

For entry in SysConfig setting, only the name without "KIXCMDDExplorer"_ prefix needs to be given. Image files must be at least 16x16 pixels in size.

Classification Attributes for Tree View

- SysConfig setting:
  ITSMConfigItem::Frontend::AgentITSMCMDBExplorer###CIClassClassificationAttribute

Some ConfigItem classes have attributes for sub-classifying various elements in ConfigItem class. For example "Hardware" ConfigItem class has "Type" classification attribute, to differentiate different hardware types (computer, printer, etc.).

This setting allows you to specify a classification attribute in order to display a sub-level for the corresponding ConfigItem class in tree view.

Please note: currently only one sub-level configurable per ConfigItem class.

Settings for Elements in CMDB Explorer Dashboard

- SysConfig setting: AgentITSMCMDBExplorer::DashboardBackend###0100-ConfigItemsPerClass
- SysConfig setting AgentITSMCMDBExplorer::DashboardBackend###0150-OpenTicketsPerClass
- SysConfig setting: AgentITSMCMDBExplorer::DashboardBackend###0100-ConfigItemsPerInciState
- SysConfig setting: AgentITSMCMDBExplorer::DashboardBackend###0200-ConfigItemsPerDeplState
- SysConfig setting: AgentITSMCMDBExplorer::DashboardBackend###0100-ConfigItemIncidentCount
- SysConfig setting: AgentITSMCMDBExplorer::DashboardBackend###0200-ConfigItemsIncidentTotal
- SysConfig setting: AgentITSMCMDBExplorer::DashboardBackend###0300-ConfigItemsWithOpenTickets
- SysConfig setting: AgentITSMCMDBExplorer::DashboardBackend###0400-NewConfigItems
- SysConfig setting: AgentITSMCMDBExplorer::DashboardBackend###0500-ConfigItemsWithMostVersions
- SysConfig setting: AgentITSMCMDBExplorer::DashboardBackend###0600-ChangedConfigItems

Please note: only change these settings if absolutely necessary.

Changing ConfigItem Class Hierarchy

CMDB Explorer is intended to offer a hierarchal view of CMDB. In default version, there is no configured hierarchy of ConfigItem classes. A parent class can be given for a ConfigItem class via General Catalog Management.

To do this, click "General Catalog" in "Admin" area.

In list, select "ITSM::ConfigItem::Class". Now select the class that you want to define a parent class for in "ITSM::ConfigItem::Class" list.
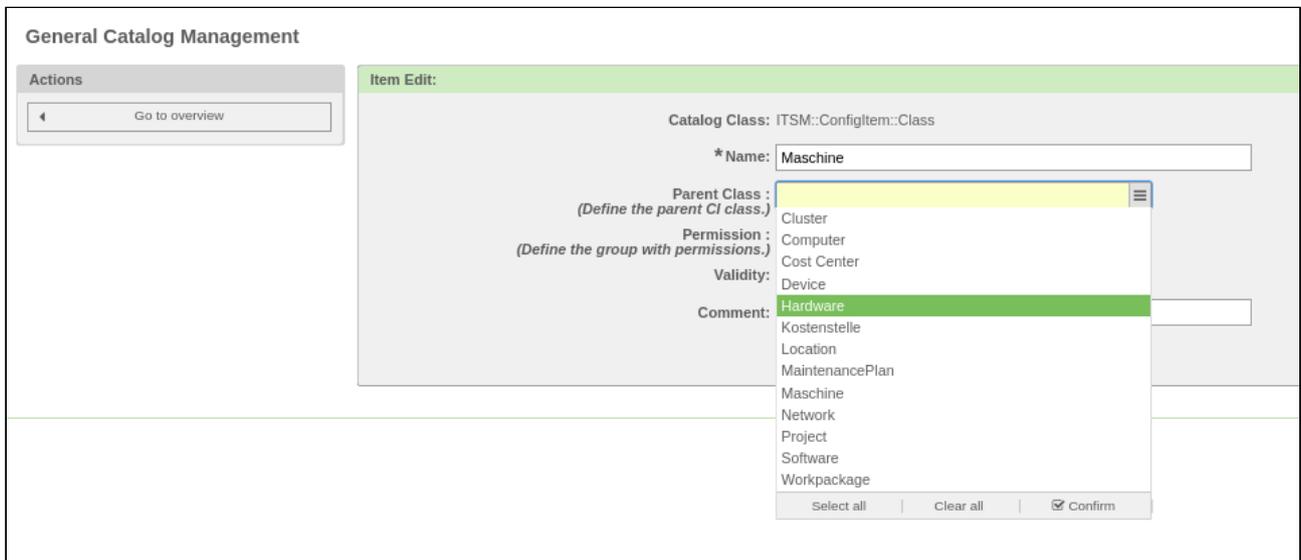
Now select one or more parent classes in "Parent Class" input field. This way, classes will be shown in tree view under their parent class.

6.3   CMDB View in Self-Service Portal

With KIX Pro it is possible to provide your contact at the customer with a filtered view of the CMDB.

To configure settings for this function, select "KIX Pro" group in SysConfig. After page has reloaded, select one of the subgroups:

"Frontend::Customer::ITSMConfigItem::Permission" or *"Frontend::Customer::ITSMConfigItemOverview"*.

Visibility Check for ConfigItems

- SysConfig setting: ITSMConfigItem::CustomerPermission::Class###001-ItemClassVisibleCheck

Module for checking whether a ConfigItem is visible for a customer under the defined conditions (for this purpose see *"ITSMConfigItem::CustomerPermission::ViewableClasses"* and *"ITSMConfigItem::CustomerPermission:: CustomerAttributeCheck::ViewableClasses"*).

Visibility Check for ConfigItem Classes

- SysConfig setting: ITSMConfigItem::CustomerPermission::Class###001-ClassViewableCheck

Module for checking whether a ConfigItem class is visible for a customer under the defined conditions (for this purpose see *"ITSMConfigItem::CustomerPermission::ViewableClasses"* and *"ITSMConfigItem:: CustomerPermission::CustomerAttributeCheck::ViewableClasses"*).

Viewable ConfigItem Classes

- SysConfig setting: ITSMConfigItem::CustomerPermission::ViewableClasses

Use this setting to define the ConfigItem class ("Key") in which a certain attribute ("Content") has to correspond to the search pattern from the setting:

"ITSMConfigItem::CustomerPermission::ViewableClasses::SearchPattern"

Multiple values in the input field "Content" are separated by commas.

Please note: This setting is required. By default, the classes "Computer", "Hardware" and "Software" are set with the attribute "Owner" as a value.

Viewable ConfigItem Classes – Search Pattern

- SysConfig setting: ITSMConfigItem::CustomerPermission::ViewableClasses::SearchPattern

This setting defines the search pattern which is used for comparing with the specified attribute in the setting:

"ITSMConfigItem::CustomerPermission::ViewableClasses"

Multiple values are separated by commas. The order of the values must be as specified in the setting:

"ITSMConfigItem::CustomerPermission::ViewableClasses"

Please note: This setting is required. By default, the classes "Computer", "Hardware" and "Software" are set with "$Self->{UserID}" as the value. Use "$Self->{...}" if you want to have a special customer attribute as a value. "*" can be used as a placeholder.

Attribute Check for Customer-Specific, Viewable Classes

- SysConfig setting: ITSMConfigItem::CustomerPermission::CustomerAttributeCheck

Use this setting to define which customer attribute (content from key "AttributeName") has to correspond to the value of the key "AttributeMatchRegExp" so that the additional classes and search pattern criteria are used in the following options.

Please note: the specified default values simply serve as examples. The value "AttributeMatchRegExp" can also be a regular expression.

Customer-Specific, Viewable Classes

- SysConfig setting: ITSMConfigItem::CustomerPermission::CustomerAttributeCheck::ViewableClasses

Using this setting you can define the ConfigItem class (the value for "Key") in which a certain attribute (the value for "Content") has to correspond to the search pattern from the setting: "ITSMConfigItem::CustomerPermission::CustomerAttributeCheck::ViewableClasses::SearchPattern". Multiple attributes are separated by commas. The check can only be carried out if the customer has met the requirements from the setting:

"ITSMConfigItem::CustomerPermission::CustomerAttributeCheck"

Please note: The attribute "Organization" in the example is not part of the standard class definition of the ConfigItem class "Computer".

Customer-Specific, Viewable Classes – Search Pattern

- SysConfig setting:
ITSMConfigItem::CustomerPermission::CustomerAttributeCheck::ViewableClasses::SearchPattern

This setting defines the search pattern that is used for comparing with the ConfigItem attributes specified by:

"ITSMConfigItem::CustomerPermission::CustomerAttributeCheck::ViewableClasses"

Multiple values are separated by commas and must be specified in the same order as in setting:

"ITSMConfigItem::CustomerPermission::CustomerAttributeCheck::ViewableClasses"

The check can only be carried out if the customer has met the requirements from the setting:

"ITSMConfigItem::CustomerPermission::CustomerAttributeCheck"

Please note: This setting is required. By default, ConfigItem class "Computer" is listed with value "$Self->{UserCustomerID}". Use "$Self->{...}" if you want to have a special attribute as a value. "*" can be used as a placeholder.

Checking Permissions for ConfigItem

- SysConfig setting: ITSMConfigItem::CustomerPermission::Class###001-ItemClassGroupCheck

Use this setting to check the group permission for a ConfigItem. The user can only see ConfigItems if they have permissions in the relevant group for this ConfigItem class. Additionally, the ConfigItem must have the attribute "GroupAccess".

Please note: this setting is only relevant if the customer group functionality is active (setting "CustomerGroupSupport").

Checking Permissions for ConfigItem Classes

- SysConfig setting: ITSMConfigItem::CustomerPermission::Class###001-ClassGroupCheck

Use this setting to check the group permission for a ConfigItem class. The user can only see ConfigItems of a certain ConfigItem class if they have permissions in the relevant group for this ConfigItem class.

Please note: this setting is only relevant if the customer group functionality is active (setting "CustomerGroupSupport").

Permissions

- SysConfig setting: ITSMConfigItem::CustomerFrontend::CustomerITSMConfigItem###Permission

- SysConfig setting:
  ITSMConfigItem::CustomerFrontend::CustomerITSMConfigItemZoom###Permission

Use these settings to specify the required permissions in order to use the CMDB view and zoom view for a ConfigItem in the customer frontend.

Please note: these settings are required. This setting is only relevant if the customer group functionality is active (setting "*CustomerGroupSupport*").

Visible Columns in ConfigItem Overview

- SysConfig setting: ITSMConfigItem::CustomerFrontend::CustomerITSMConfigItem###ShowColumns

Use this setting to specify visible columns in ConfigItem overview. The setting has no effect on the order of the columns. Class-specific attributes must be entered using the format "Attribute:: Number" (e.g. "*Type::1*").

Please note: "Class" column is always active if all classes are shown.

Limiting Visible ConfigItems with Deployment State

- SysConfig setting:
  ITSMConfigItem::CustomFrontend::CustomerITSMConfigItem###DeploymentStatesToShow
  You can use this setting to specify which deployment state is shown in the ConfigItem overview. This is a general setting and cannot be individually adapted for individual classes.

Please note: This setting is required.

Activating Visibility for ConfigItem Attributes

If you leave the default class definition unchanged, only the following information will be shown in the ConfigItem zoom view:

- ConfigItem name
- ConfigItem deployment state
- ConfigItem incident state

To display class-specific ConfigItem attributes (for example owner, type), the visibility of the attribute for each class has to be specified using "CustomerViewable" in the class definition. For example:

```
{
    # Shown in the CI-Zoom
    Key              => 'SerialNumber',
    Name             => 'SerialNumber',
    CustomerViewable => 1,
    Input => {
            Type        => 'Text',
            Size        => 50,
            MaxLength   => 150,
    },
},
{

    # Not shwon in the CI-Zoom
    Key              => 'Note',
    Name             => 'Note',
    CustomerViewable => 0,
    Input => {
            Type        => 'TextArea',
            Required    => 0,
    },
},
{

    # Also not shwon in the CI-Zoom
    Key              => 'Owner',
    Name             => 'Owner',
    Input => {
            Type => 'Customer',
    },
},
```

Activating Visibility for ConfigItem Classes

You can activate the visibility for a certain ConfigItem class if you add the class name as a "key" in the setting:

"ITSMConfigItem::CustomerPermission::CustomerAttributeCheck::ViewableClasses"

If you want to show all ConfigItems of a class, leave "Content" field empty.

There is the option to change the configuration such that only ConfigItems with special characteristics (attribute values) are shown in the ConfigItem overview. For this purpose, the following steps are required:

• Enter attribute name in "Content" field.
• Add a search pattern for checking that the attribute corresponds with the field "Content" using the setting:

ITSMConfigItem::CustomerPermission::CustomerAttributeCheck::ViewableClasses::SearchPattern

Using the settings:

ITSMConfigItem::CustomerPermission::CustomerAttributeCheck::ViewableClasses and

ITSMConfigItem::CustomerPermission::CustomerAttributeCheck::ViewableClasses::SearchPattern

you can define other conditions for the visibility of ConfigItems in the customer frontend in the same manner. However, these settings depend on the customer and are only used if the relevant customer meets the requirements from:

ITSMConfigItem::CustomerPermission::CustomerAttributeCheck

6.4   CI-Admin Module (CI Admin Modules)

"CI-Admin Module (CI admin modules)" expands the zoom view of a CI with the additional tab "Admin Module (Admin modules)". Under this tab you can find configurable modules for connecting to various applications where URLs are used with parameters based on the data of the current CI. Pre-defined commands can also be executed in the applications.

A selection of these admin modules can be configured such that they are displayed directly in the "Assigned CIs" sidebar.

To configure settings for this function, select "KIX Professional" group in SysConfig. After the page has been reloaded, select sub-group "*Frontend::Agent::ITSMConfigItem::Permission*" or "*Frontend::AgentViewConfigItem::AdminModules*".

Required Permissions for Using the Admin Modules

- SysConfig setting: ITSMConfigItem::Frontend::AgentITSMConfigItemZoomTabAdmin−Permission

Using this setting, you define the required permissions for the group "itsm-configitem" so that the tab "CI Admin Module (CI admin modules)" is visible in the CI zoom view.

Please note: This setting is required. Default value is "ro".

Standard VNC Module

- SysConfig setting: ITSMConfigItemAdminModules###0100-VNC

Use these settings to configure the standard module for the VNC plugin.

- The value of the parameter "Group" is used in order to limit access to the plugin (e.g. "admin, group1, group2"). The user must have writing access in the specified groups.
- The value of the parameter "CIClass" defines in which type of ConfigItem the plugin is shown (e.g. "Computer; Hardware").
- The value of the parameter "Image" defines which image is shown for this plugin (e.g. "picture.png").
- The value of the parameter "Attributes" defines the link for this plugin.
- The value of "Sidebar" parameter determines whether the plugin is visible in the sidebar in "Assigned CIs" widget.

Standard OPSI Module

- SysConfig setting: ITSMConfigItemAdminModules###0110-OPSI

Use these settings to configure the standard module for the OPSI plugin.

- The value of the parameter "Group" is used in order to limit access to the plugin (e.g. "admin, group1, group2"). The user must have writing access in the specified groups.
- The value of the parameter "CIClass" defines in which type of ConfigItem the plugin is shown (e.g. "Computer; Hardware").
- The value of the parameter "Image" defines which image is shown for this plugin (e.g. "picture.png").
- The value of the parameter "Attributes" defines the link for this plugin.
- The value of "Sidebar" parameter determines whether the plugin is visible in the sidebar in "Assigned CIs" widget.

Standard RDP Module

- SysConfig setting: ITSMConfigItemAdminModules###0110-RDP

Use these settings to configure the standard module for the RDP plugin.

- The value of the parameter "Group" is used in order to limit access to the plugin (e.g. "admin, group1, group2"). The user must have writing access in the specified groups.
- The value of the parameter "CIClass" defines in which type of ConfigItem the plugin is shown (e.g. "Computer; Hardware").
- The value of the parameter "Image" defines which image is shown for this plugin (e.g. "picture.png").
- The value of the parameter "Attributes" defines the link for this plugin.
- The value of "Sidebar" parameter determines whether the plugin is visible in the sidebar in "Assigned CIs" widget.

Please note: The module is deactivated by default.

Standard vSphere Module

- SysConfig setting: ITSMConfigItemAdminModules###0110-vSphere

Use these settings to configure the standard module for the vSphere plugin.

- The value of the parameter "Group" is used in order to limit access to the plugin (e.g. "admin, group1, group2"). The user must have writing access in the specified groups.
- The value of the parameter "CIClass" defines in which type of ConfigItem the plugin is shown (e.g. "Computer; Hardware").
- The value of the parameter "Image" defines which image is shown for this plugin (e.g. "picture.png").
- The value of the parameter "Attributes" defines the link for this plugin.
- The value of "Sidebar" parameter determines whether the plugin is visible in the sidebar in "Assigned CIs" widget.

Please note: The module is deactivated by default.

Standard Module for Printers

- SysConfig setting: ITSMConfigItemAdminModules###0120-Printer

Depending on your configuration, you can directly access a printer that is represented by a ConfigItem using the browser.

Use these settings to configure the standard module for the printer plugin.

- The value of the parameter "Group" is used in order to limit access to the plugin (e.g. "admin, group1, group2"). The user must have writing access in the specified groups.
- The value of the parameter "CIClass" defines in which type of ConfigItem the plugin is shown (e.g. "Computer; Hardware").
- The value of the parameter "Image" defines which image is shown for this plugin (e.g. "picture.png").
- The value of the parameter "Attributes" defines the link for this plugin.
- The value of "Sidebar" parameter determines whether the plugin is visible in the sidebar in "Assigned CIs" widget.

Standard Module for Switch and Router

- SysConfig setting: ITSMConfigItemAdminModules###0130-Switch/Router

Depending on your configuration, you can directly access a printer that is represented by a ConfigItem using the browser.

Use these settings to configure the standard module for the switch/router plugin.

- The value of the parameter "Group" is used in order to limit access to the plugin (e.g. "admin, group1, group2"). The user must have writing access in the specified groups.
- The value of the parameter "CIClass" defines in which type of ConfigItem the plugin is shown (e.g. "Computer; Hardware").
- The value of the parameter "Image" defines which image is shown for this plugin (e.g. "picture.png").
- The value of the parameter "Attributes" defines the link for this plugin.
- The value of "Sidebar" parameter determines whether the plugin is visible in the sidebar in "Assigned CIs" widget.

Standard Module for Telephones

- SysConfig setting: ITSMConfigItemAdminModules###0140-Phone

Depending on your configuration, you can directly access a telephone that is represented by a ConfigItem using the browser.

Use these settings to configure the standard module for the telephone plugin.

- The value of the parameter "Group" is used in order to limit access to the plugin (e.g. "admin, group1, group2"). The user must have writing access in the specified groups.

- The value of the parameter "CIClass" defines in which type of ConfigItem the plugin is shown (e.g. "Computer; Hardware").
- The value of the parameter "Image" defines which image is shown for this plugin (e.g. "picture.png").
- The value of the parameter "Attributes" defines the link for this plugin.
- The value of "Sidebar" parameter determines whether the plugin is visible in the sidebar in "Assigned CIs" widget.

Standard Module for Telephone Systems

- SysConfig setting: ITSMConfigItemAdminModules###0150-PhoneSystem

Depending on your configuration, you can directly access a telephone system that is represented by a ConfigItem using the browser.
Use these settings to configure the standard module for the telephone system plugin.

- The value of the parameter "Group" is used in order to limit access to the plugin (e.g. "admin, group1, group2"). The user must have writing access in the specified groups.
- The value of the parameter "CIClass" defines in which type of ConfigItem the plugin is shown (e.g. "Computer; Hardware").
- The value of the parameter "Image" defines which image is shown for this plugin (e.g. "picture.png").
- The value of the parameter "Attributes" defines the link for this plugin.
- The value of "Sidebar" parameter determines whether the plugin is visible in the sidebar in "Assigned CIs" widget.

Standard Module for Network Storage

- SysConfig setting: ITSMConfigItemAdminModules###0160-Storage

Depending on your configuration, you can directly access network storage that is represented by a ConfigItem using the browser.
Use these settings to configure the standard module for the network storage plugin.

- The value of the parameter "Group" is used in order to limit access to the plugin (e.g. "admin, group1, group2"). The user must have writing access in the specified groups.
- The value of the parameter "CIClass" defines in which type of ConfigItem the plugin is shown (e.g. "Computer; Hardware").
- The value of the parameter "Image" defines which image is shown for this plugin (e.g. "picture.png").
- The value of the parameter "Attributes" defines the link for this plugin.
- The value of "Sidebar" parameter determines whether the plugin is visible in the sidebar in "Assigned CIs" widget.

Standard Module for Tape Library

- SysConfig setting: ITSMConfigItemAdminModules###0170-Tape-Library

Depending on your configuration, you can directly access a tape library that is represented by a ConfigItem using the browser.

Using these settings, you configure the standard module for the tape library plugin.

- The value of the parameter "Group" is used in order to limit access to the plugin (e.g. "admin, group1, group2"). The user must have writing access in the specified groups.
- The value of the parameter "CIClass" defines in which type of ConfigItem the plugin is shown (e.g. "Computer; Hardware").
- The value of the parameter "Image" defines which image is shown for this plugin (e.g. "picture.png").
- The value of the parameter "Attributes" defines the link for this plugin.
- The value of "Sidebar" parameter determines whether the plugin is visible in the sidebar in "Assigned CIs" widget.

Standard Template Modules

- SysConfig setting: ITSMConfigItemAdminModules###0180-Template_1
- SysConfig setting: ITSMConfigItemAdminModules###0190-Template_2
- SysConfig setting: ITSMConfigItemAdminModules###0200-Template_3
- SysConfig setting: ITSMConfigItemAdminModules###0210-Template_4
- SysConfig setting: ITSMConfigItemAdminModules###0220-Template_5

Use these settings to configure up to five of your own Admin modules. The parameters are the same as the parameters for other modules (for example VNC).

- The value of the parameter "Title" defines the name that is shown for this module.
- The value of the parameter "Description" may contain a description of the Admin module. The description is only shown in the SysConfig.
- The value of the parameter "Block" defines how the value of the parameter "Attributes" is used. Please do not change this parameter, as this will mean that other settings will be ignored

Please note: This setting is deactivated by default.

Standard Module for Executing Commands

- SysConfig setting: ITSMConfigItemAdminModules###0230-CommandExec

Contrary to other modules described in this section, this module does not use a URL. Instead, it allows you to define commands that are then executed when the user clicks the symbol of the module in the KIX GUI.

- The value of the parameter "Commands" is the command to be executed. The field "Key" is the displayed name and the field "Content" is the actual command here.
- The value of the parameter "Timeout" limits the run time of the command to be executed.

If only one command is specified, the command is executed once you click on the symbol in the KIX GUI. If the case of multiple commands, a widget with a dropdown menu opens. You can select the command to be executed here.

If an error occurs when executing a command, then this is also shown in a widget:

Please note: the command should be written such that it ends by itself. Otherwise, the command is canceled. This setting is deactivated by default. The setting cannot be executed in the widget "Assigned CIs".

6.5   Baseline CIs

The "baselines" offer a functionality that enables you to define standard configurations for ConfigItems within ConfigItem classes. For example, this is helpful when comparing a ConfigItem with the company standard. A baseline is simply just a ConfigItem with a special deployment state that can be linked to other ConfigItems of the same class.

Creating a Baseline ConfigItem

A baseline ConfigItem is created in the same way as a standard ConfigItem. The only difference is that "baseline" has to be selected for the deployment state. This baseline ConfigItem can be linked with other ConfigItems if the modified class definition from the example above is used.

Comparison of ConfigItem with a Baseline

In order to compare a ConfigItem with a baseline, click "Mit Standardkonfiguration vergleichen (Compare with baseline configuration)" button in the zoom view of a ConfigItem. All available baselines are displayed in the following pop-up. If one or more baselines are linked with the ConfigItem, then this is pre-selected and compared with the last version.

"Comparison with Baseline Configuration" button

- SysConfig setting: ITSMConfigItem::Frontend::MenuModule###701-BaselineCompare

This setting activates "Vergleich mit Standardkonfiguration (Comparison with Baseline Configuration)" button in the ConfigItem zoom view.

Frontend Registration for Auto-Complete Search Results

- SysConfig setting: Frontend::Module###AgentCIBaselineSearch

Frontend module registration for the agent. Please do not deactivate this setting.

ConfigItem Class Definition

The class definition of a ConfigItem can be expanded as follows in order to link a baseline with ConfigItems:

```
{
     Key => 'Baseline',
     Name => 'Baseline',
     Searchable => 1,
     Input => {
         Type                   => 'BaselineReference',
         ReferencedCIClassName => 'Computer',
     }
     CountMin => 0,
     CountDefault => 1,
     CountMax => 5,
},
```

You can also use more than one baseline. If you want to use only one baseline (standard case), simply remove the "Count" attributes in the code example above.

6.6   Expanded Bulk Action for CIs

This functionality expands the bulk action for ConfigItems such that class-specific attributes can also be selected.

To configure settings for this function, select "ITSM" group in the SysConfig. After page has reloaded, select subgroup:

"Frontend::Agent::ConfigItem::ViewBulk".

Activating Selection of Class-Specific Attributes with the ConfigItem Bulk Action

- SysConfig setting: ITSMConfigItem::Frontend::AgentITSMConfigItemBulk###Attributes

Use this setting to activate the option of selecting class-specific attributes with the ConfigItem bulk action. The attributes are only visible if only ConfigItems of a single class are selected.

Handling of the Attributes with ConfigItem Bulk Action

- SysConfig setting:
  ITSMConfigItem::Frontend::AgentITSMConfigItemBulk###AttributesHandleTogether

If this setting is active, class-specific attributes that occur multiple time are handled together. If, for example, only the first two occurrences of one of the attributes are changed with the ConfigItem bulk action, all additional occurrences of the attribute are viewed as redundant and removed from the ConfigItems involved.

Please note: Default value is "Yes".

- SysConfig setting:
  ITSMConfigItem::Frontend::AgentITSMConfigItemBulk###AttributesHandleTogether

If this setting is active, class-specific attributes that occur multiple time are handled together. If, for example, only the first two occurrences of one of the attributes are changed with the ConfigItem bulk action, all additional occurrences of the attribute are viewed as redundant and removed from the ConfigItems involved.

Attributes to Be Ignored with ConfigItem Bulk Action

- SysConfig setting: ITSMConfigItem::Frontend::AgentITSMConfigItemBulk###AttributesToIgnore

Use this setting to define the class-specific attributes that are not to be provided in the bulk action (negative list). The entry in the field "Key" is the class. Values in the field "Content", separated by a comma or semicolon, make up the list of individual attributes.

6.7   Unique check for CIs

When creating or editing a CI, you can perform a unique check on the attributes of the CI by adapting the CI class. This is important to ensure that a certain attribute is only assigned once, for example an IP address or a serial number.

Step 1:

To do this, go to the KIX Pro group in SysConfig and then to the Core :: ITSMConfigItem subgroup. Activate the SysConfig key ITSMConfigItem :: EventModulePre ### 110-ConfigItemUniqueCheck.

Step 2:

In the ConfigItem administration, go to the class in which the unique check is to be created on an attribute. Adjust the attribute in this CI class accordingly with 'UniqueForCIClass'.

Example of the "Serial number" attribute

```
{
        Key => 'SerialNumber',
        Name => 'Serial Number',
        Searchable => 1,
        Input => {
            Type => 'Text',
            Size => 50,
            MaxLength => 100,
        },
        UniqueForCIClass => 1,
    },
```

6.7.1   Check unique values depending on the usage status

If a CI attribute is marked with 'UniqueForCIClass', its values on CIs are evaluated and checked regardless of the usage status. To exclude CIs that for example are in maintenance or have been retired, you can restrict the usage status parameter.

To do this, go to the *KIX Pro* group in SysConfig and then to the *Core :: ITSMConfigItem* subgroup.

Option 1:

Activate the key *ConfigItemUniqueCheck::UniqueForCIClass###IgnoreDeploymentStates*.

- This key defines the usage status which should be ignored for the class-based uniqueness check. The default values here are Inactive, Expired and Retired.

Option 2:

Activate the key *ConfigItemUniqueCheck::UniqueForCIClass###IgnoreDeploymentStatesByClass*.

- This defines the usage status for a class, which should be ignored for the class-based uniqueness check. The key is the name of the relevant class, the content is the status to be ignored.

If both keys are activated, option 2 has priority over option 1.

6.8 Overview of attributes for config item classes

6.8.1 Available attribute types

<table>
<tr>
<td>CIClassReference</td>
<td>KIXPro</td>
<td>

```
{
    Key => 'Location',
    Name => 'Asset
Location',
    Searchable => 1,
    Input => {
        Type =>
'CIClassReference',

ReferencedCIClassName
=> 'Location',

ReferencedCIClassLinkT
ype => 'Includes',

ReferencedCIClassLinkD
irection => 'Reverse',

ReferencedCIClassRefer
enceAttributeKey =>
'SerialNumber',

SearchInputType =>
'AutoComplete',
        },
    },
```

</td>
<td colspan="3">

Integration of config items

Key	Value	Hints
ReferencedCIClassName	String	Referenced class via name
ReferencedCIClassID	Integer	Referenced class via ID
ReferencedCIClassLinkType	String	Link type for the automatic creation of a link If not set, no link will be created
ReferencedCIClassLinkDirection	Reverse|Normal	If a directed link type has been set, you can control here whether a reverse link should be set here

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

Key	Value	Hints
ReferencedCIClassReferenceAttributeKey	String	Attribute which should serve as an identifier for the import
SearchInputType	AutoComplete|Pattern	Standard: Autocomplete AutoComplete Pattern: allows to search for several relevant configitems by name (* allowed as wildcard), by number (starts with '[Number]' followed by digest. * allowed as wildcard) and by id (starts with '[ID]' followed by digest). Multiple entries can be separated by '||'.

Hints:

			• If a CI is edited via the edit dialog, all links are deleted and set again according to the CI attribute • The "Key" attribute must be unique within the class definition
ServiceReference	KIXPronce	```{ Key => 'AssignedService', Name => 'Assigned Service', Input => { Type => 'ServiceReference', ReferencedServiceLinkType => 'RelevantTo', ReferencedServiceLinkDirection => 'Normal', }, },```	Integration of services **Hints:** • If a CI is edited via the edit dialog, all links are deleted and set again according to the CI attribute • If all service references are deleted in the CI edit dialog, the links are not deleted • The "Key" attribute must be unique within the class definition

The following sub-table appears within the ServiceReference "Integration of services" cell:

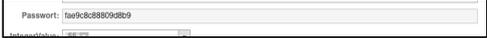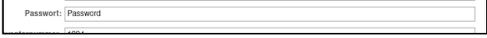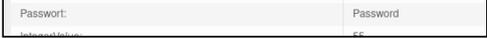| Key	Value	Hints
ReferencedServiceLinkType	RelevantTo	Link type for the automatic creation of a link If not set, no link is created
ReferencedServiceLinkDirection	Reverse|Normal	If a directed link type has been set, you can control here whether a reverse link should be set here

| CIAttachment | KIXPro | ```
{
    Key        =>
'Attachment',
    Name       =>
'Attachment',
    Input => {
        Type =>
'CIAttachment',
    },
    CountMin => 0,
    CountMax => 4,
},
``` | Integration of attachments<br><br>**Hints:**<br><br>• In contrast to the standard CI systems, these systems behave more like a normal CI attribute<br>• You are not limited to 25 systems (unless you configure it that way)<br>• Systems are tied to the CI version<br>  • If it is changed, a new version is created<br>• CountMin and CountMax are mandatory attributes<br>  • If they are missing, the attachments cannot be deleted<br>  • If CountMin> = 1, the last system cannot be deleted<br>• Attention: Never use attachments in the overviews, for example in ITSMConfigItem::Frontend::AgentITSMConfigItem ### ShowColumnsByClass |
|---|---|---|---|
| User | KIXPro | ```
{
    Key        =>
'Responsible',
    Name       =>
'Responsible',
    Input => {
        Type => 'User',
    },
},
``` | Integration of users<br><br>Verantwortlicher: "Test Agent" <test.agent@cape-it.de><br><br>**Hint:**<br><br>• Autocomplete field |
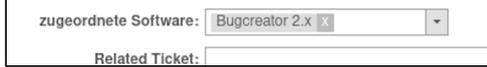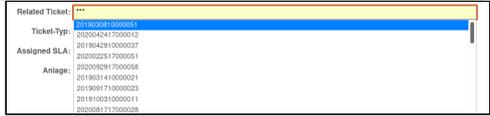
| QueueReferen ce | KIXPro | ```
{
    Key         =>
'AssignedQueue',
    Name        =>
'Assigned Queue',
    Input => {
        Type =>
'QueueReference',
    },
},
``` | Integration of queues<br><br>**Hint:**<br><br>• Autocomplete field |
| CustomerUser Company | KIXPro | ```
{
    Key         =>
'CustomerUserCompany',
    Name        =>
'Customer User
Company',
    Input => {
        Type =>
'CustomerUserCompany',
    },
},
``` | Integration of customer/company<br><br>**Hints:**<br><br>• Autocomplete field with customers/ companies<br>• Searches the Customer**User**Datas of the CustomerCompany<br>• The ID is used for export / import<br>• Not used in reports, just as a restriction |

| CIACCustome rCompany | KIXPro | ```{   Key   =>'CustomerUserCompany',   Name   =>'Customer Company',   Input => {   Type =>'CIACCustomerCompany',   },},``` | Integration of customer/company**Hints:**• Autocomplete field with customers/ companies• Searches the CustomerCompany backend• The appearance of the output can be controlled with ITSMCIAttributeCollection::Compan yBackendMapping• The export/import information can be controlled with ITSMCIAttributeCollection::Custome rCompany::Content• Not used in reports, just as a restriction |

| EncryptedText | KIXPro | ```
{
    Key         =>
'Password',
    Name        =>
'Password',
    Group => {
        admin => 1,

SomeOtherGroupname =>
1,
    },
    Input => {
        Type        =>
'EncryptedText',
    },
},
``` | Storage of passwords or content that may not be viewed by everyone |

Storage of passwords or content that may not be viewed by everyone

Key	Value	Hint
Group	Hash	Hash of group names with permission to be seen • Group => 1: visible • Group => 0: displayed encrypted

Editing/Viewing without rights:

Editing/Viewing with rights:

Hint:

• RW rights are required in the corresponding groups

| TextLink | KIXPro | ```
{
    Key => 'TextLink',
    Name => 'Text
Link',
    Input => {
        Type =>
'TextLink',
        URL =>
'http://
www.example.com/
<VALUE>',
    },
},
``` | Shows a defined link for a stored value<br><br>| Key | Value | Hint |<br>| --- | --- | --- |<br>| URL | String | URL plus <Value>, the value stored in the text field is used in Value |<br><br><br><br>**Hints:**<br><br>• If the URL does not start with http / https, the link is accepted relative to the KIX instance<br>• Attention: Never use attachments in the overviews, for example in ITSMConfigItem::Frontend::AgentITSMConfigItem###ShowColumnsBy Class<br>• Popularly used to pass links to system monitoring or printer control tools |
| DynamicField | KIXPro | ```
{
    Key        =>
'Impact',
    Name       =>
'Impact',
    Input => {
        Type       =>
'DynamicField',
        Name       =>
'TicketFreeText14',
    },
},
``` | Allows the use of dynamic fields of the type "single selection"<br><br>| Key | Value | Hint |<br>| --- | --- | --- |<br>| Name | String | Name of the dynamic field |<br><br><br><br>**Hint:**<br><br>• Only dynamic fields of the "single selection" type are supported |

| TicketReference | KIXProce | ```
{
    Key        =>
'RelatedTicket',
    Name       =>
'Related Ticket',
    Searchable => 1,
    Input => {
        Type =>
'TicketReference',

ReferencedTicketLinkTy
pe => 'RelevantTo',

ReferencedTicketLinkDi
rection  => 'Normal',
    },
},
``` | Integration of tickets |
|---|---|---|---|

Key	Value	Hints
ReferencedTicketLinkType	String	Link type for automatic linking
ReferencedTicketLinkDirection	Reverse| Normal	Direction of the link

Hints:

- The ticket number is searched for
- Allows the automatic creation or deletion of links to the ticket
- The "Key" attribute must be unique within the class definition
- If the CI is adjusted in the CI edit dialog, the links are deleted and set again as defined in the attribute
- A link to the ticket is displayed, which opens a new window when clicked
    - Exception: no link is created in print mode

TypeReferenc e	KIXPro	<pre>{ Key => 'TicketType', Name => 'Ticket Type', Input => { Type => 'TypeReference', }, },</pre>	Integration of TicketTypes

SLAReference	KIXPro		Integration of SLAs		

```
{
    Key        =>
'AssignedSLA',
    Name        =>
'Assigned SLA',
    Input => {
        Type =>
'SLAReference',

ReferencedServiceAttrK
ey =>
'AssignedService',

ReferencedCustomerLogi
n =>
'AssignedCustomer',

ReferencedCustomerComp
any =>
'AssignedCompany'
    },
    CountMin => 0,
    CountMax => 1,
    CountDefault => 0
},
```

Key	Value	Hints
ReferencedServiceAttrKey	String	Name of an attribute of the type "ServiceReference" in the current CI class definition * Is required as a filter attribute for the SLAs * Only SLAs assigned to this service are displayed
ReferencedCustomerLogin	String	Name of an attribute of the type "Customer" in the current CI class definition * Is required as a filter attribute for the SLAs * Only SLAs that are assigned to this contact person are displayed

Key	Value	Hints
Reference dCustome rCompany	String	Name of an attribute of the type "CIACCustome rCompany" in the current CI class definition * Is required as a filter attribute for the SLAs * Only SLAs assigned to this customer / company are displayed

Hints:

- One of the three parameters should be specified
    - If none is stored, only the SLAs that are assigned to a standard service are displayed
- CountMin and CountDefault should be set to 0
    - Only add these fields with the "+" button AFTER all referenced fields (Service, CustomerUser, CustomerCompany) have been filled with values, otherwise the values will be ignored
- If ReferencedCustomerLogin is stored, ReferencedCustomerCompany is ignored

			• If the referenced attribute is an array attribute, SLAs are found for each referenced value and only the intersection of these result sets is displayed • If the SLAReference attribute is a sub-attribute of the referenced service or customer/company attribute, only the value of the higher-level attribute is used

7 System Administration Area

7.1 Translation Management

This function enables KIX administrators to create, update or delete translations for any language. You can do as many translations as you need. It is also possible to export and import translations so that the data can also be edited with a third-party application.

Initial setup
Click the Check File System and Update Database button. The application then scans all files and searches for translatable values. Each translated value is entered in the database.

Find translations
To find a translation, enter a term in the "Actions" widget in the input field. You can limit the search to a specific text template (the original, untranslated), a translation or limit the search to a specific language. The search is started by clicking on the "Search" button.

Edit translations
In order to edit a translation, a search must first be carried out. When you have results to search, click the Edit button. The editing screen appears with the original text template at the beginning and all available translations. You can now edit the translation. Save the editing by clicking the "Save" button.

Edit translation templates
In order to edit a translation template, a search must first be carried out.

7.2 Translations

In this area, you can create and manage translations for parts of the program, such as menu items or button descriptions. There is the option to import and export translations.

Figure: Translation Management

> ⓘ **Note**
>
> If you delete existing language files, you will have to restart Apache afterwards. Otherwise you will get an error message.

The following SysConfig keys can be used to translate services, SLAs and types:

- Ticket :: ServiceTranslation,
- Ticket :: SLATranslation
- Ticket :: TypeTranslation

To do this, go to the *Ticket* group in *SysConfig* and then to the *Core :: Ticket* subgroup. Set the relevant key to "Yes".

The prerequisite is that a translation has been stored in KIX. This affects all selections and lists in the agent/ customer view. The only exception is the admin overview. The objects in question are still displayed there in their original form.

7.2.1 Translations in the ticket information sidebar

In the ticket information sidebar, the translation is only carried out via the corresponding configuration within the sidebar. If you activate a translation configuration, you must also adjust the corresponding entry in the SysConfig in*Ticket → Frontend :: Agent :: AgentTicketZoom*.

7.3   Add a new translation for a text template

In the "Search for Text Template" field, enter the term for which you want to add a new translation. Wildcards can be used in the search. A list opens with the text templates found and the languages.
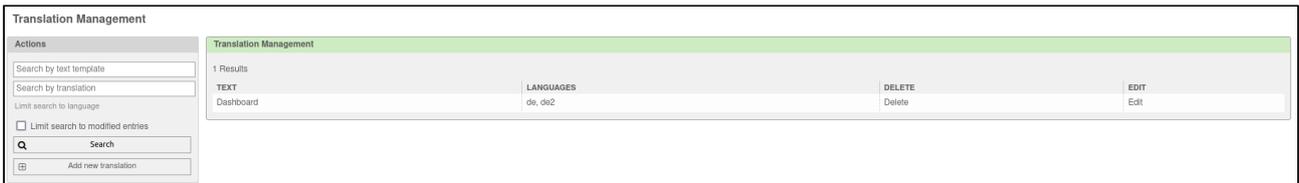

Figure: List of results for a term found

Click on "Edit" in the list. A widget opens in which all the languages created in the system and the respective translation for this term are displayed.

Figure: Languages and translations for one term

Click the "Add New Language" button. The following widget appears:

Figure: Adding a new language

Enter a language name in the "Language" field. In the "Text" field, enter the translated term for the language. Then click the "Save" button.
Then click the Create Language button in the Database and File Operations widget. The language file is created in order to make the language values changed in the database available for KIX again.
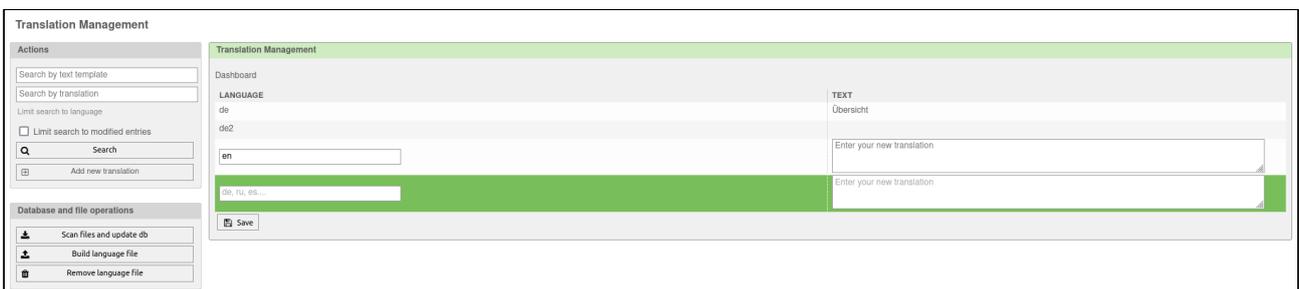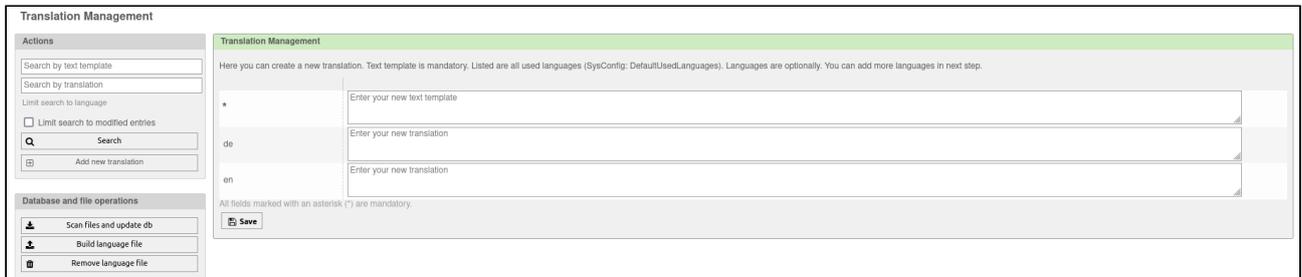
7.4 Define a new text template for a translation

In the Actions widget, click the "Add New Translation" button. The following widget opens:

Figure: Adding a translation

- Enter the text template for which you want to create a translation in the upper input field.
- Enter the translated term for the text template in the input fields below.
- Then click the "Save" button.
- Then click the "Create language file" button

⚠️ **Hint**

If a translation has already been created for the text template, the following error message appears: "Could not insert key. Duplicate entry found!"

7.5 Adjustments for processes

With KIX Pro there are adjustments to the configuration of processes. The difference to KIX Start is marked with a yellow border in the figure below.

You can now:

- Assign customer portal groups
- Determine the sorting in the display in the customer frontend
- Store an icon for the template

Please note the following:

- The sorting should contain an alphanumeric value, according to which the order of the objects is then sorted in the display. Examples are '001' before 'A27'. If no value has been stored, '999' is assumed.

Figure: Adjustments to the configuration for processes in KIX Pro

7.5.1 Transitional action: automatically set agent as watcher

In a process definition, it is possible to automatically set an agent as a watcher on the ticket as part of a transition action. When the transition action is carried out, agents who have read and write rights to the current ticket queue are stored on the ticket as watchers.The execution has no influence on agents who are already observing the ticket. They are still set as a watcher.

- Create a new transition action. The corresponding button can be found on the left-hand side of the screen in the "Available Process Elements" widget.
- Give the transition action a name and select "TicketWatcherSet" as the transition action module.

Create New Transition Action
Cancel & close

▲ Transition Action

* Transition Action Name: [   ]

* Transition Action Module: [   ] [▼]

DynamicFieldSet	
MultipleTicketCreate	
TicketArticleCreate	
TicketArticleSend	
TicketCreate	
TicketCustomerSet	
TicketDynamicFieldCalculation	
TicketLockSet	
TicketOwnerSet	
TicketPrioritySet	
TicketQueueSet	
TicketResponsibleSet	
TicketServiceSet	
TicketSLASet	
TicketStateSet	
TicketTitleSet	
TicketTypeSet	
TicketWatcherSet	
UpdateMultipleTickets	

Config Parameters   ⊞

Key: [   ]

Submit

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Figure: Configuring the "TicketWatcherSet" transition action

- If necessary, you can add further configuration parameters. To do this, enter the relevant key and a value for it.
- "Submit" the action to the system.

The transition action is now available to you and you can integrate it into the process.

7.6 Expansion of the types of dynamic fields

You can create and manage dynamic fields in the Admin → Ticket Settings → Dynamic Fields area. KIX Pro offers dynamic fields for the following objects:
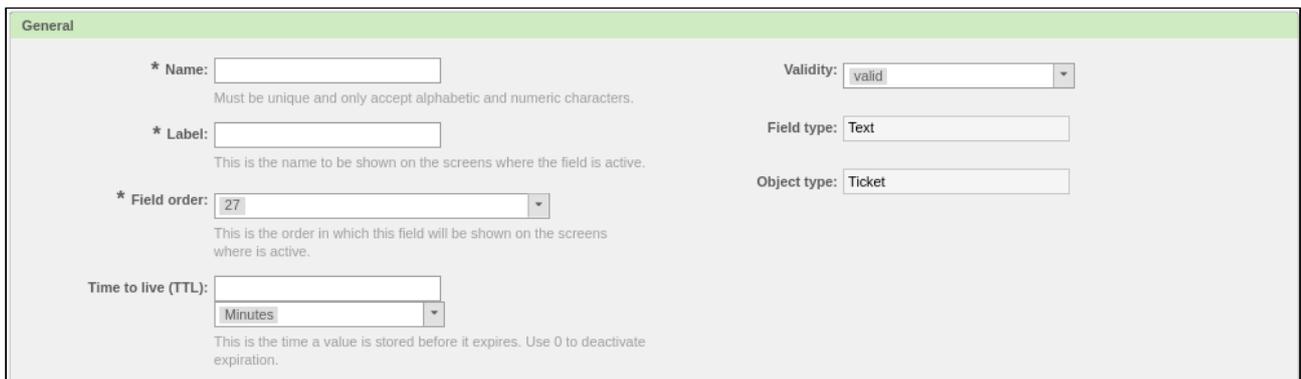
- Ticket
- Article
- FAQ
- CustomerUser
- CustomerCompany
- FieldServiceTour

The following field types are added in KIX Pro:

- Attachment
- Captcha
- Rich Text
- Table
- Token

After selecting the desired field type, a new form opens. This form is divided into three areas: General, Field type-specific entries and SysConfig settings for the dynamic field.

The first area "*General*" is the same for every field type. Here you define the following: Name, labeling, field sequence, value lifetime, validity. The field type is preselected, as is the object type.

Figure: Create dynamic field - general settings

The third area "D*ynamicField S*y*sConfig Settings*" is the same for every field type. Here you specify in which front-end modules the dynamic field should be displayed and where it should be a mandatory field, if applicable. Select one or more entries in the list. To select multiple values, keep the left mouse button pressed.

Figure: Create dynamic field - SysConfig settings

7.6.1 Attachment

The dynamic field type Attachment is used to save attachments.

7.6.2 Captcha

The dynamic field type Captcha is used to check whether the form details were provided by a person.

7.6.3 Rich Text

The dynamic field type RichText is used to provide the user with an editor.

7.6.4 Table

The dynamic field type table is used to offer a table as an input format.

7.6.5 Token

The dynamic field type token is used to generate software tokens.

7.7   Implement and transfer terms of use

As an administrator, you can define terms of use for both the agent front end and the customer front end, which the respective user must accept when logging in in order to work with the system.

In the admin module, go to the System administration group and then to the menu item Adjust conditions of use.

Figure: Terms of use management

Here you can see two widgets with the current terms of use for agents and customers. You can change these conditions by clicking on the respective edit button:

- To edit
- Deactivate (set invalid)
- Delete (via the "Trash" icon in the widget header on the right)

In the sidebar you can create or edit a usage condition for a specific front end.

- When editing the condition, you can customize the text.
  - ⚠️ The use of images in text is not supported!
- The current condition can be deactivated.
- If the text of the condition is emptied and saved, this is equivalent to deleting the condition.
- If the newly created or changed condition is to be read and accepted by every user in the respective area, this can be done via a checkbox "Is acceptance required?" to be activated.
- Has the checkbox "Is acceptance required?" If checked, every user will be informed of the user conditions when logging into the system.
  - The user must accept the terms of use in order to continue using the system. There is a checkbox under the user-defined text that must be checked.
  - If the conditions have been accepted, they will not be requested again unless renewed acceptance is requested.
  - The accepted terms of use are stored in the "UserTermsAccept" preference with a time stamp.
- If a condition has been changed and a new acceptance is required, this will only be requested at the next login.

Use case:

As an administrator, you would like to store a note on the nondisclosure agreement for the agent front end. The user should mark via a checkbox that he agrees to the terms of use.

So when an agent logs in, he has to tick the box and confirm the terms of use before he can work with the system. This confirmation or approval is saved in a history and contains the name of the agent and the time stamp of the confirmation.

7.8   System Monitoring

With the help of system monitoring, IT managers can permanently monitor their infrastructure. This helps to identify errors and fix them. KIX supports the automatic assignment and processing of event messages via email from systems such as Nagios, Icinga or CheckMK.

The setup of a system monitoring configuration is shown below as an example

- *PostMaster::PreFilterModule###0001-SystemMonitoring*

described. If required, you can set up multiple system monitoring configurations. To do this, use the other SysConfig keys with the name pattern "*PostMaster::PreFilterModule###*-SystemMonitoring*".

The SysConfig key can be found in the *Framework* group, *Core::PostMaster* subgroup

AcknowledgeName	Establishes the reference to the system monitoring acknowledge configuration.	Nagios1
AddressRegExp	Defines the search pattern with which the address of the affected system is extracted from the mail. The first capture group is used.	\s*Address:\s+(.*)\s*
AliasRegExp	Defines the search pattern with which an alias of the affected system is extracted from the mail. The first capture group is used.	\s*Alias:\s+(.*)\s*
CloseActionState	Defines the status that is set on the ticket when a system monitoring status corresponding to "CloseTicketRegExp" is received.	closed successful
CloseNotIfLocked	Prevents the status from being set according to "CloseActionState" if the existing ticket is locked.	0
ClosePendingTime	If a waiting status is set in "CloseActionState" (e.g. "pending auto close"), this waiting time is set in seconds at the time the message is received.	172800

CloseTicketRegExp	If the system monitoring status matches this pattern, an existing ticket is provided with a new ticket status according to "CloseActionState". If no open ticket can be found for this service or host, the email will be discarded and ignored.	OK | UP
DefaultService	If no service is found in the system monitoring message, this value is set.	Host
DynamicFieldAdress	⚠ Do not change - Defines the Dynamic Fields used by the mechanism associated with tickets.	SysMonXAddress
DynamicFieldAlias	⚠ Do not change - Defines the Dynamic Fields used by the mechanism associated with tickets.	SysMonXAlias
DynamicFieldContent::Article	⚠ Do not change - Defines the Dynamic Fields used by the mechanism associated with tickets.	State
DynamicFieldContent::Ticket	⚠ Do not change - Defines the Dynamic Fields used by the mechanism associated with tickets.	Host, Service, Address, Alias
DynamicFieldHost	⚠ Do not change - Defines the Dynamic Fields used by the mechanism associated with tickets.	SysMonXHost
DynamicFieldService	⚠ Do not change - Defines the Dynamic Fields used by the mechanism associated with tickets.	SysMonXService
DynamicFieldState	⚠ Do not change - Defines the Dynamic Fields used by the mechanism associated with tickets.	SysMonXState
FromAddressRegExp	This system monitoring configuration only processes e-mails whose sender matches this pattern.	nagios@example.com
HostRegExp	Defines the search pattern used to extract the hostname of the affected system from the mail. The first capture group is used.	\s*Host:\s+(.*)\s*

Module	⚠️ Do not change - Defines backend code module used for mail processing.	Kernel::System::PostMaster::Filter::SystemMonitoringX
NewTicketRegExp	If the system monitoring status matches this pattern, a new ticket will be created if there is no open one.	CRITICAL | DOWN | WARNING
OTRSCreateArticleType	⚠️ Do not change - Defines the sender type of the article that is created for the ticket.	note-report
OTRSCreateSenderType	⚠️ Do not change - Defines the sender type of the article that is created for the ticket.	system
OTRSCreateTicketQueue	Defines the team to which the ticket is initially assigned. The non-localized name must be used. The full name must be used.	
OTRSCreateTicketSLA	Defines the SLA, which is initially assigned to the ticket.	
OTRSCreateTicketService	Defines the service that is initially assigned to the ticket.	
OTRSCreateTicketState	Defines the ticket status that is set when the ticket is created. The non-localized name must be used.	
OTRSCreateTicketType	Defines the ticket type used to create the ticket. The non-localized name must be used.	Incident
ServiceRegExp	Defines the search pattern with which the affected service is extracted from the mail. The first capture group is used.	\s*Service:\s+(.*)\s*
StateRegExp	Defines the search pattern with which the system monitoring status is extracted from the mail. The first capture group is used.	\s*State:\s+(\S+)
StopAfterMatch	If set ("1"), no further email filters will be applied when processing the email.	1

ToAddressRegExp	This system monitoring configuration only processes e-mails whose to-recipients match this pattern.	kix@example.com

7.8.1 Set incident status

It is possible to set the event status of a CI automatically when a health monitoring email arrives.

To do this, go to the Framework group in the SysConfig and there to the *Core::ConfigItem* subgroup.

- *SystemMonitoringX::SetIncidentState*

The setting must be enabled to use this feature. Default is "Yes".

7.8.2 Link incident ticket to CI

To do this, go to the *Framework* group in the SysConfig and there to the *Core::ConfigItem* subgroup.

- *SystemMonitoringX::LinkTicketWithCI*

Link an already open incident ticket to the affected CI. This is only possible if a subsequent system monitoring email arrives. Default is "No".

7.8.3 Automatically link CIs to tickets

You can specifically and automatically link CIs to tickets. To do this, use the "TicketAutoLinkConfigItem" event handler. This is an addition to the system monitoring integration via mail filter. It enables a targeted search for CIs, based on CI-identifying information stored in articles (especially emails) or fields, such as IP addresses or FQDNs. The specific attributes of the CI classes are used as search criteria and searches are only carried out in suitable classes.

The configuration is done in the group *Ticket* subgroup *TicketAutoLinkConfigItem*

- *Ticket::EventModulePost###500-TicketAutoLinkConfigItem*
    - Workflow engine that associates the ticket with related CIs - Event handler only supports the following events: ArticleCreate, TicketFreeTextUpdate. Requires the installation of OTRS::ITSM::ConfigurationManagement!
    - ⚠️ DO NOT ACTIVATE IF THIS EXTENSION IS NOT INSTALLED ON YOUR SYSTEM!

In the group *Framework* subgroup *TicketAutoLinkConfigItem* you will find the other setting options:

- *TicketAutoLinkConfigItem::CISearchPattern*
    - Determines which patterns should be extracted from which ticket attributes. The first capture group of the regular expression to be stored as a value is used for the search in the CMDB. Key is the ticket attribute, e.g. "DynamicField_SysMonXHost" or "Article_Body". If several search patterns are to be extracted from the same ticket attribute, the keys can be provided with the suffix "_ORn" (where n is 1..N) - e.g. "Article_Body" and "Article_Body_OR1".

- *TicketAutoLinkConfigItem::CISearchInClassesPerRecipient*
    - This configuration is only relevant for article evaluations. It allows restricting the CI classes to be searched based on the To-Recipient of the triggering article. The key contains an email address. The value contains a comma-separated listing of the CI classes to search. Only the pure e-mail address (localpart@domainpart [no real name]) is evaluated, regardless of upper/lower case.

- *TicketAutoLinkConfigItem::CISearchInClasses*
    - This configuration defines in which CI class (key), which attributes are to be searched and must match the found search patterns. Multiple attributes must be separated by commas. An attribute must contain the full name in its CI class structure, e.g. "*SectionNetwork::NIC::IPAddress*" to search by IP address to be able to perform a unique search.

ℹ Also note the information (description) in the respective keys.

7.8.4 Digression: Nagios

If you decide to use Nagios as a tool, it will receive e-mail messages sent by the network monitor. In the event of disruptions and failures, a new ticket is automatically created. If the ticket is opened by the agent, all disruption or incident data is stored on the ticket. Once the fault has been resolved, the ticket status can be changed or the ticket can be closed.

7.8.4.1 Course of processing for Nagios

The following course of processing shows how emails are handled by Nagios and in which cases they trigger which action.

- Email matches `FromAddress` ?
    - No → The regular processing of the e-mail is continued.
    - Yes → Check whether there is already a ticket with the same host and service.
        - No → Does `State:` match `NewTicketRegExp` ?
            - No → Processing of the e-mail is terminated.
            - Yes → A new ticket is created, the corresponding host and service are recorded and stored in the process
        - Yes → The e-mail is attached to the ticket. Does `State:` match `CloseTicketRegExp` ?
            - No → The regular processing of the e-mail is continued.
            - Yes → The ticket type changes depending on the configuration in `CloseActionState` .

7.8.5 Digression: Icinga

If you choose Icinga, the process takes place by specifying the host and service in the dynamic fields of the ticket. If the correct combination of both parameters occurs, the ticket is blocked for an agent. The lock in turn generates an HTTP request that is sent to the configured Icinga host. Icinga uses this very request to create or confirm new incidents or disruptions.

7.9 Templates in the customer frontend

Templates are templates for documents that are used as templates for a variety of different applications. Whenever certain document types are (must) be created regularly, they are used. A template is designed in such a way that the user can fill it out quickly and easily with texts, graphics and other multimedia content.

7.9.1 Change the view of the templates

From version KIX 17.13, templates and processes are displayed in the customer front end with a new structure, the folder structure. This is the default setting. However, it is possible to change this setting.

To do this, go to the Ticket group in *SysConfig* and then to the *Frontend :: Customer :: TicketTemplates* subgroup.

By editing the key "*Ticket :: Frontend :: CustomerTicketTemplates ### ViewMode*" you can choose between a folder and a list structure.

Finally click "Update" and the change will be saved.

ⓘ **Sorting the groups**

In the list setting, the set priority (sorting) and the name are sorted. This means that you can prioritize groups, both subgroups and main groups, so that they can be seen more quickly. Example:

- Groups:
    - Main group1 999
    - Subgroup1 201
    - Subgroup2 100
    - Subgroup3 200
    - Main group2 200
- This results in the sorting:
    1. Subgroup2
    2. Main group 2
    3. Subgroup3
    4. Subgroup 1
    5. Main group 1

Figure: Example folder structure

7.9.2 Limitation of the visibility of templates

It is possible to restrict the visibility of templates. Up to now this was possible via the configuration of the SysConfig key *"Ticket::Frontend::CustomerTicketTemplates ### UserAttributeRestriction"*. However, this is considered obsolete from version 17.17.

This function is replaced by two separate configurations *"Ticket::Frontend::CustomerTicketTemplates###UserAttributeBlacklist"* and *"Ticket::Frontend::CustomerTicketTemplates###UserAttributeWhitelist"*, which offer more room for maneuver. You can now configure an OR-linked check of CustomerUser attributes for ticket templates, which must be fulfilled in order to see the template.

To do this, go to the *Ticket* group in *SysConfig* and then to the *Frontend::Customer::TicketTemplates* subgroup.

Figure: SysConfig key: Frontend::Customer::TicketTemplates.

- *"Ticket::Frontend::CustomerTicketTemplates###UserAttributeWhitelist"*
    - This allows you to define conditions (whitelist) for the visibility of templates for contacts.
    - The key consists of the template key, followed by two colons and a contact attribute.
    - The value contains a RegExp. As soon as the regexp applies, exactly the user to whom it fits has access to the template.

- *"Ticket::Frontend::CustomerTicketTemplates###UserAttributeBlacklist"*
    - By selecting this key, you define a restriction (blacklist) for the visibility of templates for contacts.
    - The key consists of the template key, followed by two colons and a contact attribute.
    - The value contains a RegExp. If the regexp applies, there is no access to the template.

Finally click "Update" and the change will be saved.

> ⚠ Information in the blacklist has priority over information in the whitelist.

> ⓘ **Example**
>
> The case studies each include blacklist and whitelist:
> - Case 1: The template "TemplateYX" should only be displayed for users of the company "FirmaZ" and the department "DepartmentX".
> - Execution:
>   - Blacklist:
>   - TemplateYX :: UserDepartment -> ^ (? :(?! DepartmentX).) * $
>   - Whitelist:
>   - TemplateYX :: CustomerCompanyName -> ^ (FirmaZ) $
>
> - Case 2: The template "TemplateYY" should only be displayed for users with the last name "Last NameX" and who do not come from the city "StadtZ".
> - Execution:
>   - Blacklist:
>   - TemplateYY :: UserCity -> ^ (StadtZ) $
>   - Whitelist:
>   - TemplateYY :: UserLastname -> ^ (Last NameX) $

8 InventorySync

The KIX Professional module "InventorySync" provides core functionalities and add-ons to the GUI for synchronizing data from external inventory tools or asset databases.

In order to integrate an inventory tool (e.g. OPSI), you have to install a suitable backend package so that the module "InventorySync" is able to communicate with the external inventory tool.

It is possible to install multiple backend packages if data is to be used from multiple different inventory tools.

To configure settings for this function, select "KIX Professional" group in SysConfig. After page has reloaded, select subgroup "ITSMConfigItem:: InventorySync".

Configuration of the Data Sources

- SysConfig setting: ITSMConfigItem::InventorySync###Sources

A hash is used for communication with a data source. The entry in "Key" is the internal name (identifier) of the data source (for example Inventory1). The entry in the field "Content" is the display name for this data source.

Please note: the key is required for all following settings. It is a good idea to keep the key designation as short as possible.

Backend Mapping of the Data Source

- SysConfig setting: ITSMConfigItem::InventorySync###Backend

You can define the backend to be used for the data sources here. The entry in "Key" is the internal name (identifier) of the data source. The entry in the field "Content" is the name of the backend to be used.

Please look at the documentation of the backend used for more information.

Parameters of the Data Source

- SysConfig setting: ITSMConfigItem::InventorySync###Parameters

You can specify the parameters of the relevant backend here. You can find more information in the documentation for the relevant backend.

ConfigItem Standard State

- SysConfig setting: ITSMConfigItem::InventorySync###DefaultState

Use this setting to configure which incident and deployment state is to be set for an imported ConfigItem.

Automatic Tickets for the Report for a Change to a ConfigItem

- SysConfig setting: ITSMConfigItem::InventorySync###ReportTicketCreate

Use this setting to define whether an automatic ticket is to be generated with information concerning changes during synchronization.

Ticket Parameters for the Report for a Change to a ConfigItem

· SysConfig setting: ITSMConfigItem::InventorySync###ChangeReportTickets
You can make settings to the ticket that is automatically generated to report changes during a synchronization.

You can make the following settings here:

Parameter	Required?	Explanation
ConfigItemLinkType	No	The link type used for the linked, changed CIs.
Owner	No	The standard owner for the ticket. (Default: root@localhost)
Queue	Yes	The queue for the ticket.
Responsible	No	The standard person responsible for the ticket. (Default: root@localhost).
State	Yes	The ticket state for the ticket. (Default: new)
Subject	Yes	The subject for the ticket. (Default: InventorySyncChangeReport)
Title	Yes	The title for the ticket (Default: InventorySync Change Report for:). ⓘ **Please note** Please note: the CI is attached to the title string.
Type	Yes	The ticket type for the ticket. (Default: Change Report).

Behavior of the Comparison during Synchronization

- SysConfig setting: ITSMConfigItem::InventorySync###CompareBehaviour

This setting defines the behavior of the CI version comparison. "Structure" also marks attributes where only the order has changed.

Generating an Information Ticket

- SysConfig setting: ITSMConfigItem::InventorySync###ReportTicketCreate

This setting defines whether a ticket is to be generated with information concerning changes during synchronization. Default setting is "Yes".

ConfigItem Classes

- InventoryContentXPath

In order that classes/their attributes can be synchronized with an external inventory tool, all attributes have to be expanded with a new setting "InventoryContentXpath".

Each backend uses two different data containers for Xpath:

- HW – contains all hardware information
- SW – contains all software information

The path within these containers depends on the backend of the inventory tool used. You can freely select which attributes are used. You only have to ensure that the attributes used receive a value during synchronization. Otherwise, KIX displays an error message.

Please look at the documentation for your backend for additional information.

- InventoryContentEvalString

This setting allows you to use a test string with RegEx, for example to check whether a value is to be accepted or not. For example, this can be used to accept only network adapters that have been assigned an IP address.

Within the test string, you can access the data hash with the hash variable "%Inventory".

The content of the data hash depends on the backend used.

A typical data hash for the OPSI backend (in this example for OPSI class "Network_Controller") looks like this:

```
{
    macaddress => '00:0C:29:D7:BA:88',
    maxspeed => undef,
    vendor => 'VMware, Inc.',
    description => 'VMware Accelerated AMD PCNet Adapter',
    vendorid => 1022,
    subsystemvendorid => 2000,
    ipaddress => '192.168.21.177',
    serialnumber => '',
    subsystemdeviceid => 1022,
    devicetype => 'PCI',
    deviceid => 2000,
    ipenabled => 'true',
    autosense => null,
    model => '',
    revision => 10,
    netconnectionstatus => 'Connected',
    adaptertype => 'Ethernet 802.3',
    name => 'VMware Accelerated AMD PCNet Adapter '
}
```

9 File Exchange

This KIX Professional function offers the option for a customer to download/upload data using their web browser during ticket process. If you wish to make downloading/uploading data available for a customer, you can create a data exchange token for the directory and send it to the customer.

Access to directory will be possible after entering token in self-service portal (customer frontend). Additionally, you can add a ticket reference to the token, so that each download/upload is documented in referenced ticket.
To configure settings for this function, select "KIX Professional" group in SysConfig. After page has reloaded, select subgroup "Core::FileExchange"'.

Root Directory

- SysConfig setting: FileExchange::Root

Use this setting to specify root directory for file exchange. Agents that select the menu item "File exchange" in the main menu can view the content of this directory, create sub-directories (insofar as they have the permissions required), and upload files. In default version, path is as follows: "/var/FileExchange".

Trash Directory

- SysConfig setting: FileExchange::Trash

Use this setting to specify trash directory within the data exchange. All deleted files or folders will be moved to this directory.

Type of Directory List

- SysConfig setting: FileExchange::ListType

Here you can specify length of file exchange token. Please only change this setting if absolutely necessary.

Default Validity Duration of Created Token

• SysConfig setting: FileExchange::ExhangeToken::DefaultValidityDuration

Here you can specify how long a file exchange token is valid for. The default value is 48 hours.

Directory Access

- SysConfig setting: CreateAccessMap
- SysConfig setting: ReadAccessMap
- SysConfig setting: DeleteAccessMap

Here you can specify reading/writing access for files and directories. Entry in "Key" field is file path or file name, and value in "Content" field is group for which the rights apply.

Properties of Added Articles

- SysConfig setting: *FileExchange::ArticleBody*
- SysConfig setting: *FileExchange::Article###Body::FileUpload*
- SysConfig setting: *FileExchange::Article###Subject::FileUpload*
- SysConfig setting: *FileExchange::Article###Subject::FileDownload*

Use these settings to define default content of article which is to be added to a ticket linked to a token, if the customer uploads/downloads data.

10 Calendar

To configure settings for this function, select "KIX Pro" group in SysConfig. After page has reloaded, select one of the subgroups:

- *CalendarEvent::Configuration::ITSMConfigItem*
- *CalendarEvent::Configuration::Ticket*
- *CalendarEvent::Configuration::Private*
- *Frontend::Agent::PrivateEvent*

Backend Registration for ConfigItems

- SysConfig setting: EventCalendarBackends###ITSMConfigItem

Use this setting to register the calendar backend for ConfigItems. The value is used as a display designation.

Please note: if the field is empty, the name of the backend is used.

Event Type Configuration for ConfigItems

• SysConfig setting: CalendarBackend::EventTypes###ITSMConfigItem

Use this setting to define the relevant event types for the ConfigItem backend. The value for "Key" is the type and value for "Content" is the configuration. The configuration should look as follows:

CLASS=SomeClass,START=Attribute,END=Attribute,DISPLAYNAME=SomeName

The attributes for start and end must be of the type "Date" or "Date/Time". Each entry must contain data for the start or end or both or alternatively a duration (for example "DURATION=5h"). The specified attributes should be unique attributes of the ConfigItem. The duration can be a ConfigItem attribute or "XhYm" for X hours and Y minutes.

Please note: This setting is required. If no duration and only the start or end are specified, the standard duration from the setting:

"CalendarEvent::DefaultDuration###ITSMConfigItem" is used.

If no class is specified, the entry is valid for all classes. If the field "Content" is empty, events of this key are deleted if the argument "clear" is used for deletion.

Title of a ConfigItem Calendar Event

- SysConfig setting: CalendarEvent::Title###ITSMConfigItem

Use this setting to specify the title of an event in the calendar. The entry in the field "Key" is the event type. The entry in the field "Content" is the name. Placeholders for ConfigItem attributes are possible.

Use "<CONFIGITEM_KEY_AttributName>" for general attributes and "<CONFIGITEM_ATTRIBUTE_KEY_AttributName>" for class-specific attributes.

Displayed Information of a ConfigItem Calendar Event

- SysConfig setting: CalendarEvent::ShownAttributes###ITSMConfigItem

Use this setting to define the attributes that are displayed in the info box of the calendar event. The entry in the field "Key" is the attribute. The entry in the field "Content" is the name. The entry can be empty for class-specific attributes. Instead, their characteristic "Name" is used. These attributes should therefore be unique (the first one found is used).

You can also limit the entry to a class with "Class::Attribute" (e.g. Hardware::Type). For sorting, use "01" at the start of the key, for example. The specified attributes in

"CalendarBackend::EventTypes###ITSMConfigItem"

are generally displayed if they are relevant for the event.

Please note: This setting is required.

Backend Registration for Tickets

- SysConfig setting: CalendarBackend::EventTypes###Ticket

Use this setting to register the calendar backend for tickets. The value is used as a display designation.

Please note: if the field is empty, the name of the backend is used.

Event Type Configuration for Tickets

- SysConfig setting: CalendarBackend::EventTypes###Tickets

Use this setting to define the relevant event types for the ticket backend. The entry in the field "Key" is the type and the entry in the field "Content" is its configuration. The configuration should look as follows:

"TYPE=TicketType,START=DynField1,END=DynField2,DISPLAYNAME=SomeName".

The dynamic fields (START/END) must be of the type "date" or "date/time". The entry must have START or

END or both, or alternatively a duration (e.g. "DURATION=5h") for one of the two. The duration can be a dynamic field or "XhYm" for X hours and Y minutes (e.g. "5h").

Please note: This setting is required.

If no duration and only the start or end are specified, the standard duration from the setting:

"CalendarEvent::DefaultDuration###Ticket"

is used.

If no type is defined, the entry applies to all ticket types. If the DISPLAYNAME is not specified, the key will be displayed. The values "UntilTime", "FirstResponseTime", "UpdateTime", and "SolutionTime" are special values that can be used for the start and end instead of dynamic fields.

Title of a Ticket Calendar Event

- SysConfig setting: CalendarBackend::Title###Ticket

Use this setting to specify the title of an event in the calendar. The entry in the field "Key" is the event type. The entry in the field "Content" is the name. Placeholders for ConfigItem attributes are possible.

Displayed Information of a Ticket Calendar Event

- SysConfig setting: CalendarEvent::ShownAttributes###Ticket

Use this setting to define the attributes that are displayed in the info box of the calendar event. The entry in the field "Key" can be a ticket attribute or a dynamic field such as "DynamicField_NameOfField". You can limit the attribute with "Type::FieldOrAttribute" (for example "Problem::Queue"). Use "01" in front of the key for sorting. The value in the field "Content" is the display name (can be omitted for dynamic fields; ID of the dynamic field is used).

The dynamic fields defined in the setting:

CalendarBackend::EventTypes###Ticket

are displayed if they are relevant for the particular calendar entry.

Backend Registration for Private Events

- SysConfig setting: EventCalendarBackends###Private

Use this setting to register the calendar backend for tickets. The value is used as a display designation.

Please note: if the field is empty, the name of the backend is used.

Event Type Configuration for Private Events

- SysConfig setting: CalendarBackend::EventTypes###Private

Use this setting to define the relevant event types for the private backend. The value is used as a display designation.

Please note: This setting is required. If the field is empty, the name of the backend is used. By default, three types "Business", "Holiday", and "Important" are pre-defined.

Displayed Information for Private Calendar Events

- SysConfig setting: CalendarEvent::ShownAttributes###Private

Use this setting to define the attributes that are displayed in the info box of the calendar event. The entry in the field "Key" is the attribute for the private event. Use "01" in front of the key for sorting. The entry in the field "Content" is the display name. If the field is left empty, the value from the field "Key" is used.

Please note: This setting is required.

Reminder Email for Private Events

- SysConfig setting: PrivateEventReminderEmail

Use this setting to define whether an email is to be sent if the private event reminder has been reached.

Reminder Email for Private Events − Subject

- SysConfig setting: PrivateEventReminderEmail:::Subject

Use this setting to specify the subject for the reminder email. Placeholders are possible as attributes.

Reminder Email for Private Events − Text

- SysConfig setting: PrivateEventReminderEmail:::Body

Use this setting to specify the text for the reminder email. Placeholders are possible as attributes.

<u>Relevant Agent/Ticket Connections</u>

- SysConfig setting: CalendarEvent::Ticket::UserDependendTicketConnection

Use this setting to specify which connections between the agent and ticket have to be observed. Just one of these options have to apply, so that the user can see the events for the relevant ticket.

- "Owner" / "Responsible" – agent must be the owner/responsible person
- "Linked" – agent must be linked to the ticket
- "Watcher" – agent must watch the ticket
- "MyQueues"/"MyServices" – agent must have the queue/service of the ticket in their respective list.
- "1" = Used
- "0" = Not used

<u>Please note:</u> changes (activations) do not generate any new events by themselves. For this purpose, an event in the list of:

"Ticket::EventModulePost###300-UpdateCalendarEvent"

has to be triggered for a ticket first. Deactivations prevent the display of corresponding events in the calendar immediately. You can execute the console command:

"Admin::Calendar::RecreateEvents"

in order to recreate calendar events for all tickets or a ticket.

Standard Duration of a Calendar Event

- SysConfig setting: CalendarEvent::DefaultDuration###ITSMConfigItem
- SysConfig setting: CalendarEvent::DefaultDuration###Private
- SysConfig setting: CalendarEvent::DefaultDuration###Ticket

Use this setting to specify the standard duration for an event if only the start and end, but no duration, are specified. The value should be in the format "XhYm" (X = hours/Y = minutes).

<u>Please note:</u> Default value is "1".

Background Color of a Calendar Event

- SysConfig setting: CalendarEvent::Color###ITSMConfigItem
- SysConfig setting: CalendarEvent::Color###Private
- SysConfig setting: CalendarEvent::Color###Ticket

Use this setting to specify the background color of an event in the calendar. The entry in the field "Key" is the event type. "DEFAULT" is the standard color of the backend. The value in the field "Content" is a CSS color specification such as "#111111", "rgb(255,0,0)", or "red".

Text Color of a Calendar Event

- SysConfig setting: CalendarEvent::TextColor###ITSMConfigItem
- SysConfig setting: CalendarEvent::TextColor###Private
- SysConfig setting: CalendarEvent::TextColor###Ticket

Use this setting to specify the text color of an event in the calendar. The entry in the field "Key" is the event type. "DEFAULT" is the standard color of the backend. The value in the field "Content" is a CSS color specification such as "#111111", "rgb(255,0,0)", or "red".

Border Color of a Calendar Event

- SysConfig setting: CalendarEvent::BorderColor###ITSMConfigItem
- SysConfig setting: CalendarEvent::BorderColor###Private
- SysConfig setting: CalendarEvent::BorderColor###Ticket

Use this setting to specify the border color of an event in the calendar. The entry in the field "Key" is the event type. "DEFAULT" is the standard color of the backend. The value in the field "Content" is a CSS color specification such as "#111111", "rgb(255,0,0)", or "red".

CSS Class of a Calendar Event

- SysConfig setting: CalendarEvent::Class###ITSMConfigItem
- SysConfig setting: CalendarEvent::Class###Private
- SysConfig setting: CalendarEvent::Class###Ticket

Use this setting to specify the CSS class of an event in the calendar. The entry in the field "Key" is the event type. The entry in the field "Content" is the CSS class.

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Form and table settings
Automatic value selection for selection fields

11   Form and table settings

11.1   Automatic value selection for selection fields

If only one value is available in the selection fields, this can be automatically preselected in the form. By default, this behavior is activated for the creation of a new telephone ticket and the fields Queue, Type, Status and Priority. If further forms or fields are to be equipped with this behavior, the SysConfig key must be adapted as follows: "Frontend :: Output :: FilterElementPost ### AutoSelectSingleSelection"

11.2   Add dynamic fields to the table

Tables can be expanded by inserting dynamic fields. You can create dynamic fields for the following objects:

- ticket
- item
- FAQ
- Contact Person
- Customer company
- FieldServiceTour

Dynamic fields can be output in the columns for ticket objects. They are available if they are configured accordingly in SysConfig. It is possible to display dynamic fields by default, provided that the columns to be displayed have not yet been personally defined.

In the overview tables of the linked objects in the ticket view and the ConfigItem view, the lists can be sorted and filtered according to the following parameters:

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Form and table settings
Add dynamic fields to the table

	Sortable by	Filterable by
Ticket	• Age • Created • Owner • Responsible • CustomerID • State • TicketNumber • Queue • Priority • Type • Lock • Title • Service • Changed • SLA • PendingTime • EscalationTime • EscalationUpdateTime • EscalationResponseTime • EscalationSolutionTime	• Owner • Responsible • CustomerID • State • Queue • Priority • Type • Lock • Service • SLA
Person	• UserFirstname • UserLastname • UserEmail • UserTelefon • UserMobile • Type	• Type
ITSMConfigItem	• Name • Number • CurInciState • CurDeplState • Created	• CurInciState • CurDeplState

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Form and table settings
Add dynamic fields to the table

	Sortable by	Filterable by
State	• ChangeTime • Comment • CreatTime • Criticality • Type • CurInciState • Name	• Type • CurInciState • Criticality
FAQ	• Approved • CategoryName • Changed • Created • ContentType • Title • Language • StateType • State • Number	• State • Language • StateType
Document	• Path • DisplayPath • Name	

In order to be able to filter links between documents, the following information must be stored in the SysConfig:

- Document ### Sources:
  - Key: identifier
  - Value: display name
- Document ### backend:
  - Key: identifier
  - Value: backend (e.g. FS)
- Document ### Paramenters:
  - Key: identifier
  - Value: <Parameter> =
  - Example: RootDir = / tmp /

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Form and table settings
Add dynamic fields to the table

> ⓘ **Note**
>
> It is possible to set several parameters (even the same parameters) separated by commas.
> - Example: RootDir = / tmp /, RootDir = / opt /

- Document ### Access:
  - Key: identifier
  - Value: <access type> = <access value>
  - Example: Role = R_KIX_Admin

> ⓘ **Note**
>
> It is possible to set several accesses (also with the same access type) separated by commas.
> - Example: Role = R_KIX_Admin, User = Admin
>
> The following access types can be used:
> - Role
> - Group
> - User

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

- purely for documentation purposes, such as:
    - the general management of equipment in the form of managing and cataloging device data (device meta data) such as names, IP addresses, series numbers, persons responsible, guarantee periods, service providers, operating documents, license information, cost centers, as well as the management/organisation of users, device instructions;
    - the central documentation of all activities and changes in the IT such as due to executed maintenance activities or other service activities (e.g. medical device log book);
    - for compiling a knowledge database.
- for automating and simplifying general management processes, such as:
    - in service and technical customer service, for example in IT service (errors, changes, maintenance);
    - in building services (errors, changes, cleaning) or medical device technology.
- for monitoring purposes and calendar functions, such as:
    - for central IT services (network, email, data servers, SAP,...);
    - and for error and requirement notifications for the IT team, building services, medical device technology;
    - for the planning of regular maintenance works and reminders for replacing wear parts;
    - for the organisation of regular orders and planning the deployment of service technicians.

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

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