KIX Self Service Portal Manual

KIX Self Service Portal – EN

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1 Manual

1.1 Introduction

This manual is designed for users of the KIX Self Service Portal (SSP) and explains how to make optimum use of the portal.

Depending on your access rights, you can do the following:

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

The administrator of the Self Service Portal can customize the user interface of the program. Therefore, when you log in to the KIX system, it may look different from the screenshots in this manual. This manual only contains screenshots of the standard view.

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

1.2 Glossary

Term	Explanation
Action	KIX distinguishes between ticket actions and item actions. Ticket actions are displayed in the ticket detail view as buttons in the action line and are available in the agent portal and/or the self-service portal, depending on the configuration. Article actions are available as a lateral label on the right side margin of an article, depending on the user's authorisation.
Admin	Person with advanced user rights who manages the system, assigns user rights, and enforces usage guidelines.
Agent	Owner/employee responsible for processing a request.
Article	Describes a work step within a process/ticket.
Assets	Any operating resource that has a function within the business processes, e.g. computers, software, servers, telephones, machines, vehicles, rooms, buildings, and contracts. Assets can also be referred to as: configuration item, config item, and CI.
Channel	Determines the method of communication (e.g. email, note, etc.).
CMDB	The Configuration Management Database is referred to as the Asset Database in KIX 18. It was developed for access to and management of assets.
Dialog	Separate window (overlay) with form fields or additional information.
Drag & Drop	Computer function enabling you to click/select graphical elements (e.g. icons, passages in a text, etc.), drag them across the screen with the mouse, and drop them somewhere else.

Term	Explanation
FAQ	Knowledge database for compiling information: • Particularly frequently asked questions • Treatment of frequently occurring problems • Manuals, product data sheets, documentation etc.
Icon	Symbol, graphical illustration of an element or menu item.
Incident	Describes an incident or other issue relating to an IT service or asset
News	News are notices and information that are (temporarily) displayed to the user before and/or after login. News are managed in the "News" module and made available for the Agent Portal and/or Self Service Portal.
Permission	Permissions define which work steps and actions an agent may perform and which objects and information a user may see.
Priority	Priorities indicate different degrees of urgency and can be used to categorise tickets. They are illustrated by traffic light colours.
Self Service Portal	Customer portal that is connected to KIX. Can only be used with KIX Pro.
Service	Stands for a service/performance that a company offers. Services are part of Service Level Agreements (SLA).KIX Pro includes the asset class "Service" to manage services.
Service Level Agreement (SLA)	Agreement between a service provider and its customer. An SLA regulates which services the provider provides and which service standards are defined that the provider undertakes to comply with (e.g. response time to enquiries, resolution time in the event of problems, etc.).
State	The status defines in which processing state a ticket is.

Term	Explanation
Template	Individually configured input mask for creating tickets (malfunction, average, holiday request, etc.). Individual templates are only possible in KIX Pro. KIX Start contains a customisable standard template for all tickets.
Ticket	A service operation including the totality of all its communication and documentation steps in the form of incoming and outgoing e-mails, documented calls, notes or customer feedback via the web front end. They • are requested by a contact (organisation). • are assigned to a team (queue) as well as a processor and responsible agent. • have a priority as well as a type and status.
Type / Ticket type	Classifies the type of request, e.g. fault, problem, service request, etc.
Widget	Term for small, separate windows in a program; a portmanteau of the words "window" and "gadget".
Workflow	A workflow describes the concatenation of different, consecutive steps within a business process. In the Admin Module, the administration of templates, actions and rule sets can be found under Workflow.

1.3   General information

1.3.1   Search

The search or the start of the search only starts after you click the ENTER key or clicked on the magnifying glass symbol.

1.3.2   Reload & Direct URL

You can perform a reload when the content is displayed. The page is updated.

A direct link takes you to the view of a ticket, an asset or an FAQ entry. In the Self Service Portal, ticket templates can also be opened via a direct URL call, e.g.: https://kix-domain-ssp.kix.cloud/tickets/new? templateId=79. This enables the template to be called up from a third-party system as well. The template is loaded directly after the user has successfully logged in. If a template that does not exist or is not authorised by the user is called up, the "New ticket" dialogue opens.

1.3.3   Dynamic fields

Your admin has the option of integrating additional input and selection fields into the program interface. These additional fields are called dynamic fields in KIX.

Dynamic fields can be integrated in the following objects: all ticket-relevant forms, FAQ articles, organizations and contacts.

Dynamic fields can contain the following values: text, date and time, checklists, selection options, link to affected assets as well as data source (assuming the use of KIX Pro in connection with KIX Connect).

1.3.4   Template structure

Your admin can create a variety of templates and group them. This creates a tree structure that shows the structure of the templates and their assignment. Clicking on a group takes you to the level below, which can also be grouped again.

1.4 Self Service Portal

The Self Service Portal (SSP) is the customer portal of KIX and is delivered with KIX Pro.

Customers can use the Self Service Portal to create and edit tickets and view FAQ posts and assets (operating resources). It serves as a communication and information tool.

1.4.1 Login

The KIX Self Service Portal is a browser-based service system. You can obtain the URL from your KIX portal operator. The portal can be reached, for example, at:

- `http://your.kix-docker-host.org:2000`**`1`**
  - `http://your.kix-docker-host.org:2000`**`2`**

- `https://your.agentportal.kix.cloud`
  - `https://your.agentportal`**`-ssp`**`.kix.cloud`

The registration page, also called the login page, opens.

Enter your user name and password, which you will also receive from the portal operator, in the fields provided. Then click on the login button. After successful authentication, you will be granted access to the system.

By clicking on the eye symbol you can see your password as plain text to correct spelling mistakes if necessary. If you switch to plain text display, make sure that only you can see the screen!
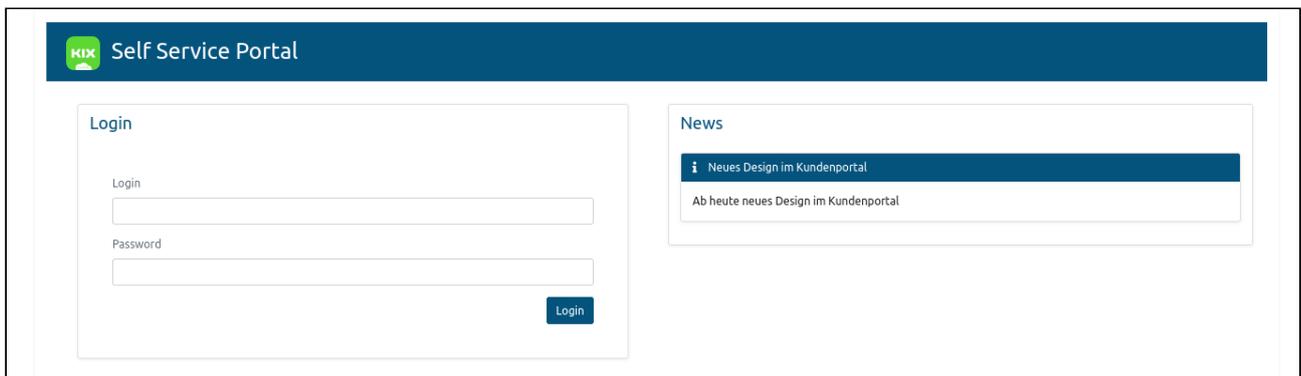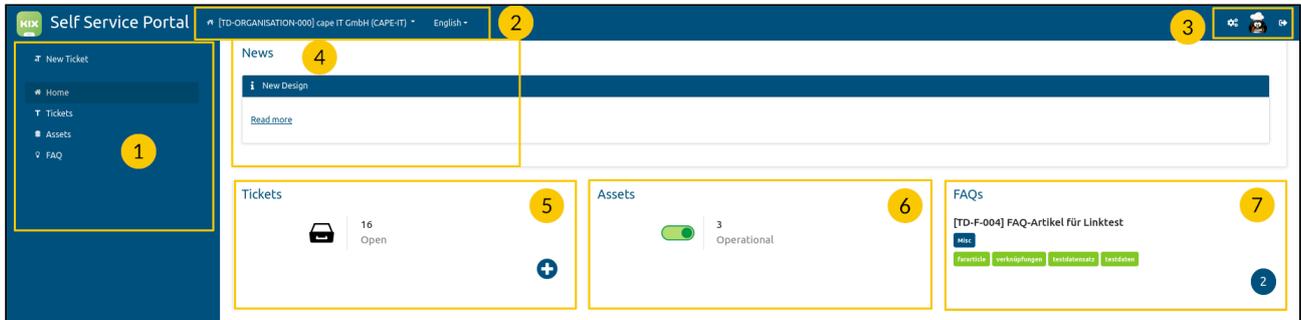

Fig.: Example Login Screen

> ⚠ After logging in, you are logged in with your primary organisation. If you work for different organisations or are assigned to more than one organisation, you have the option after logging in to set in the toolbar on behalf of which organisation you (want to) use the Self Service Portal.
> After changing the organisation, tickets, assets and FAQs will be reloaded. The same applies to the company logo or existing images.
> If you are in the details, e.g. of a ticket, when changing the organisation, you will receive an error message for this object after reloading. You then lack the authorisation to view this object.

1.4.2 Home Dashboard

After logging in, you are automatically taken to the so-called Home Dashboard, the central user interface. Here is a brief overview of the individual elements:

1 The module bar

The module bar shows the structure of the system and the individual dashboards. Clicking on the respective area takes you to the respective dashboard.

Above the module structure is the button for creating a "New Ticket".

2 Settings

After logging in, you are logged in with your primary organisation. If you work for different organisations or are assigned to several organisations, you have the option of setting which organisation you (want to) use the Self Service Portal on behalf of.

- After a change of organisation, tickets, assets and FAQs will be reloaded. The same applies to the company logo or existing images.
- If you are in the details, e.g. of a ticket, when changing the organisation, you will receive an error message for the object after reloading. You are then not authorised to view this object.

The second item is the language setting. This selection determines the language in which you want to use the application.

3 Special functions

In the first place you will find the personal settings.

In second place is your avatar.

In third place is the logout function.

ⓘ	If the red "Reload" button appears next to the special functions while you are working in the Self Service Portal, this means that there is a change/ new entry in the portal, e.g. a reply to one of your tickets. Click the button to reload the Self Service Portal.

4 News section

In this area you can see the latest news. They are displayed with the respective headline and a short teaser.

Click on [⌄] to open the detailed news item.

5 Ticket widget

This widget shows how many open tickets are in the portal.

Click on [+] to create new tickets.

6 Asset widget

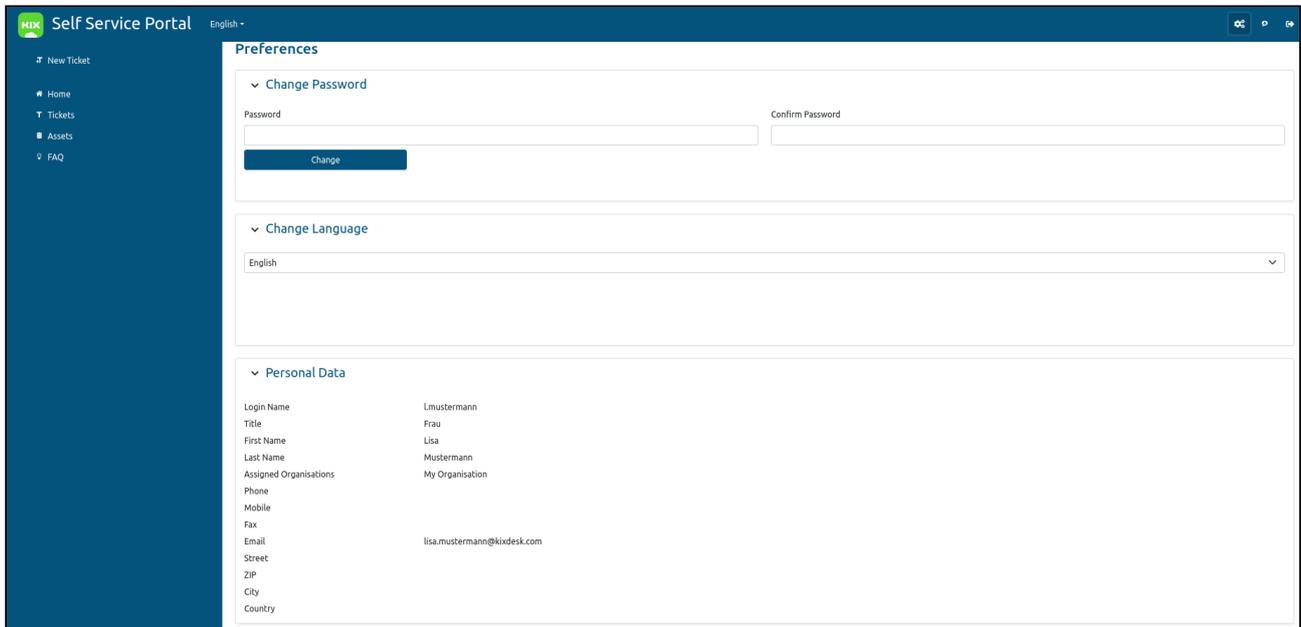This widget shows how many assets are in which incident status within your portal.

7 FAQ widget

This widget shows how many FAQs are stored within your portal. In addition, the most recently changed FAQ is displayed as a direct link.

ⓘ	The numbers in the widgets can be clicked on. This will take you quickly and easily to the relevant detail area. Example: Clicking on the number of disturbed assets leads to the list of assets with incident status "Incident".

1.4.2.1 Personal Settings

In this area you define your personal settings.

Category	Explanation
Change Password (if option is enabled)	Here you can set a new password for accessing your KIX Self Service Portal. To do so, enter your old and new chosen password, and then re-enter your new password. Clicking the [eye] symbol enables you to see your password unencrypted. The change will not come into effect until you have submitted the form. > ⓘ **Please note** > If you have forgotten your password, please contact the administrator of the portal operator. The administrator will be able to assign you a new password.
Language	Select the language in which you would like to use the portal.
Personal Data	In this overview you can see your data stored in the system. These can only be changed by the admin of the portal operator.

1.4.3 Tickets

Under this module item you will find the ticket dashboard, where all tickets created by you as well as tickets released for you by the agent can be found.

Using the search function $\boxed{Q}$, you can search your tickets by keywords. You can also filter the ticket overview by "My tickets", "Other people's tickets", "Open" and "Closed" tickets.

Click on a ticket to be forwarded to the ticket zoom view.

In longer tables, click on ⬆ at the bottom right of the screen to return to the top of the table.

Ticket#	Title	Created at ↓	State	Prio
2023041717000708	[TD-T-070] Testing-Ticket mit SLA by Affected Asset	04/17/2023, 07:54 AM	open	🟩
2023041717000691	[TD-T-069] Testing-Ticket mit SLA	04/17/2023, 07:54 AM	open	🟩
2023041717000182	[TD-T-018] Ungelesene Artikel	04/17/2023, 07:44 AM	new	🟥
2023041717000173	[TD-T-017] 4. Ticket zum Tests von Objekt-Verknüpfungen	04/17/2023, 07:44 AM	new	🟧
2023041717000164	[TD-T-016] 3. Ticket zum Tests von Objekt-Verknüpfungen	04/17/2023, 07:44 AM	new	🟨
2023041717000155	[TD-T-015] 2. Ticket zum Tests von Objekt-Verknüpfungen	04/17/2023, 07:44 AM	new	🟩
2023041717000146	[TD-T-014] 1. Ticket zum Tests von Objekt-Verknüpfungen	04/17/2023, 07:44 AM	new	🟩
2023041717000137	[TD-T-013] Ticket mit vielen Anhängen	04/17/2023, 07:44 AM	open	🟨
2023041717000128	[TD-T-012] Wasserdurchlaufzähler meldet Fehler 0815 (viele Artikel)	04/17/2023, 07:43 AM	open	🟩

1.4.3.1   New Ticket

Under this module item you will find the ticket creation, which you can use to send messages to the portal operator. Consider a new ticket similar to an e-mail, but with the advantage that your message arrives at the right place with all relevant information (images, contact information etc).

Here you will find templates for the forms for fault reports and service requests. These can also be designed as template groups. You can use the search function to search all templates by keyword or title. If keywords are stored on the ticket templates, they can be searched for in the template search of the Self Service Portal. Select your desired template by clicking on it.

After selecting the template, the form opens.
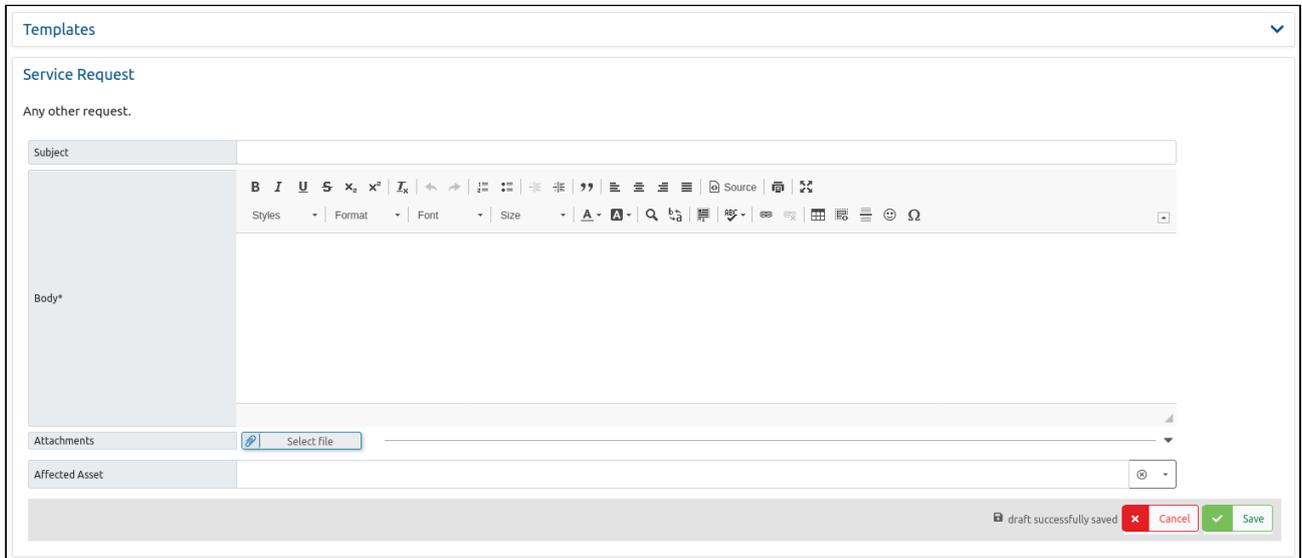
Fig.: Form after selecting the "Service Request" template

Fill out the form as follows:

Subject	This field contains a brief description of your request.
Body	Describe your request as precisely as possible in this field.
Attachments	Here you have the option of adding supplementary information, e.g. images, PDF files etc.
Affected Asset	By clicking in the field you will get to the selection of all deposited assets. If required, e.g. in the case of a malfunction report, you can clearly transmit the affected asset in this way. ℹ️ You will only be shown assets that are assigned to you or your company.
Affected Service (OPTIONAL)	Click in the field to select all stored services. If required, e.g. in the case of a malfunction report, you can clearly name the affected service. This form field is not available by default. Your admin must configure it in the source system (KIX Pro).

Finally, click on "Save" to submit your request.

1.4.3.2 Ticket Zoom View

This view contains all ticket-relevant information.

Ticket Information

In addition to the title, the ticket header contains the ticket number, information on the priority, the creation date and the status.

The header is followed by an overview of all items on the ticket. Items are the messages sent to the portal operator as well as all communications and work steps carried out on the ticket that have contributed to the solution of the ticket.

Button "Query": The editor opens. You can compose a new message and send it by clicking on "Save".

2 Further Information

In this lane, further information about the ticket is displayed. This can be the time for the planned work effort or, for example, a linked affected asset.

3 Communication History

The articles on the ticket can be searched by keywords and date. By activating the "My articles" slider, you can display the articles you have written.

By default, the articles are sorted in ascending order by creation date. You can change the sort order by clicking on the "Created on" button.

4 Article

In longer tables, click on ⬆ at the bottom right of the screen to return to the top of the table.

1.4.4 Assets

Under this module item, you will find the asset dashboard, in which all the assets are stored in your portal to which you are authorised to access are listed according to their class.

All resources involved in the business processes are referred to as assets. These assets are classified into e.g. computers, software, servers, telephones, machines, vehicles, rooms or buildings. The incident status indicates the usage status of the equipment or resource. This creates a clear structure that makes it easier to find and process operating equipment.

Using the search function, you can search your assets by keyword. The search can be limited by selecting the asset class in which to search. By activating the sliders to the left of the search function, you can filter the assets according to their operating status.

Click on an asset to be forwarded to the asset zoom view.

Search & Filter

Incident Operational warning

Computer   Software

Assets

Class ↑	A#	Name	Current incident state	Current deployment state
Computer	174000061	ThinClient035	⬤	Produktiv
Computer	174000062	ThinClient036	⬤	Produktiv
Computer	174000063	ThinClient037	⬤	Produktiv
Computer	174000064	ThinClient038	⬤	Produktiv
Software	1710000001	yEd Graph Editor	⬤	Pilotbetrieb
Software	1710000005	KIX	⬤	Produktiv

1.4.4.1   Assets Zoom View

This view contains asset-relevant information:

- the name of the asset
- the class to which the asset is assigned
- the number under which the asset is stored in the database
- the current usage status
- the current incident status
- further information on the version(s) of the asset (depending on the configuration)

1.4.5 FAQ

Under this module item you will find the FAQ Dashboard, which functions as a knowledge database.

Here you will find various information released for you, such as:

- general notes
- product data sheets
- certificates
- Error handling
- instructions for action
- etc.

You can use the search function ⬛ to search the FAQ entries for keywords.

Click on a FAQ entry to be forwarded to its detailed view.

FAQ#	Title	Category	Tags	Rating ↓
FAQ#17003	[TD-F-003] FAQ-Artikel für Objekt-Linktest	Misc	testdatensatz	
FAQ#17004	[TD-F-004] FAQ-Artikel für Linktest	Misc	fararticle, verknüpfungen, testdatensatz, testdaten	

1.4.5.1   FAQ Zoom View

This view contains information on the respective FAQ entry.

1.5   Liability Disclaimer for KIX Self Service Portal

1.5.1   Liability for Contents

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

In a medical context, KIX Self Service Portal is exclusively intended for carrying out administration and database-related tasks. If the above restrictions are complied with, KIX Self Service Portal 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 Self Service Portal 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 Self Service Portal also allows data exchange via an interface, please note that KIX Self Service Portal must not be used for data modification or for any type of data control for medical or therapeutic purposes.

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