KIX Pro

KIX 17 User Manual - EN

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1 General Notes 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 Adjustments to the User Interface

The following chapters describe the changes to the user interface in KIX Pro compared to KIX Start.

2.1 KIX Pro Customer Frontend

The KIX customer frontend is the graphical user interface (GUI) for contacts.

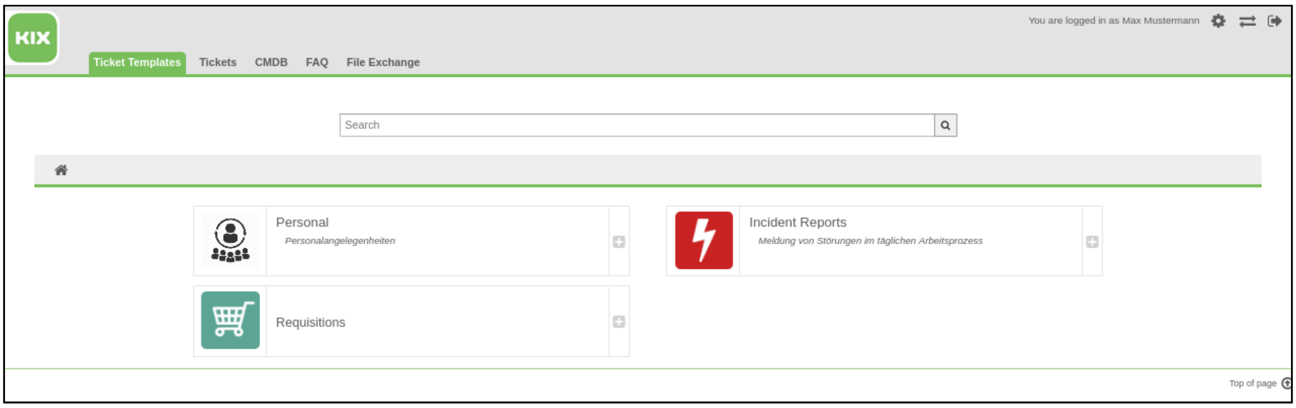


Figure: Customer Frontend Graphical User Interface

The contact can use the graphical user interface to:

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

Note

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

2.2 KIX Pro Agent Frontend

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

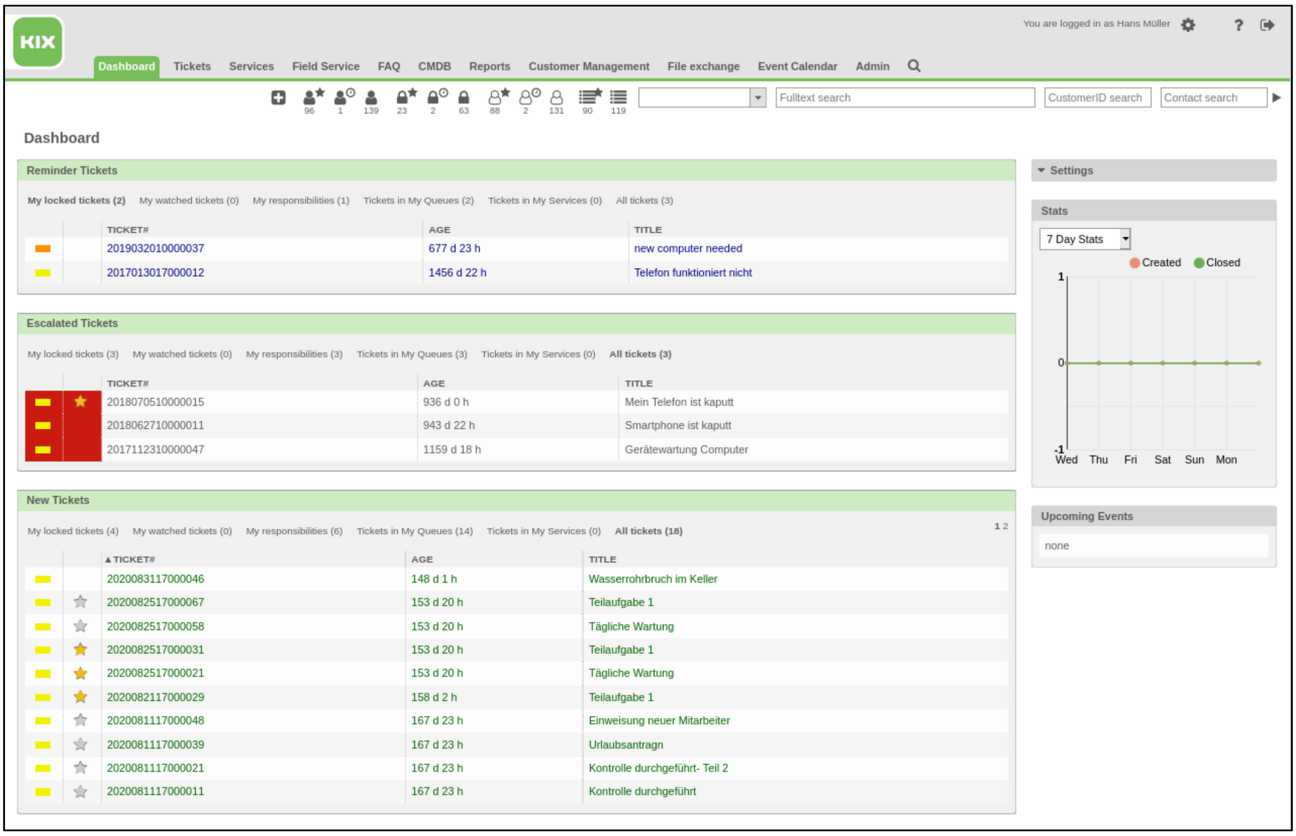


Figure: Agent Frontend Start Page

Agents can use it to:

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

New elements in toolbar

In KIX Pro the symbols for quick access to checklists are supplemented.

2.3 Toolbar Icons

Additional symbols in toolbar

Symbol		**Explanation**
	Tickets with unfinished checklist entries, total	Shows all tickets with unfinished checklist entries within an agent's remit
	Tickets with unfinished checklist entries, pending time reached	Shows all tickets with unfinished checklist entries within an agent’s remit and which have reached the pending time.
	New articles for tickets with unfinished checklist entries	Shows all tickets with unfinished checklist entries within an agent's remit and which have unread articles.

3 Adjustments for KIX Modules

KIX Pro is made up of different modules.
In the following chapters you will find information on the individual KIX modules.

3.1 Adjustments for CMDB Module

3.1.1 CI version comparison with standard configurations

With the function "CI version comparison with standard configuration" it is possible to compare created CIs with a CI that is defined as the standard configuration. A CI with the usage status "Standard configuration" is created for this.

<u>Creating Baseline Configuration for CI</u>

- In *"CMDB"* menu, click menu item *"New"*.
- Select class for default CI from list.

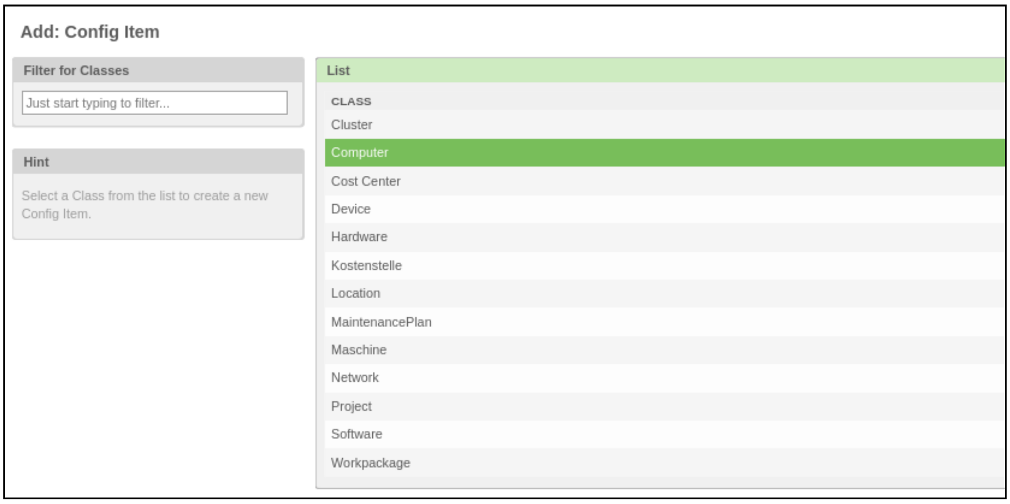


Figure: CI Class Selection

Pop-up for editing class attributes opens:

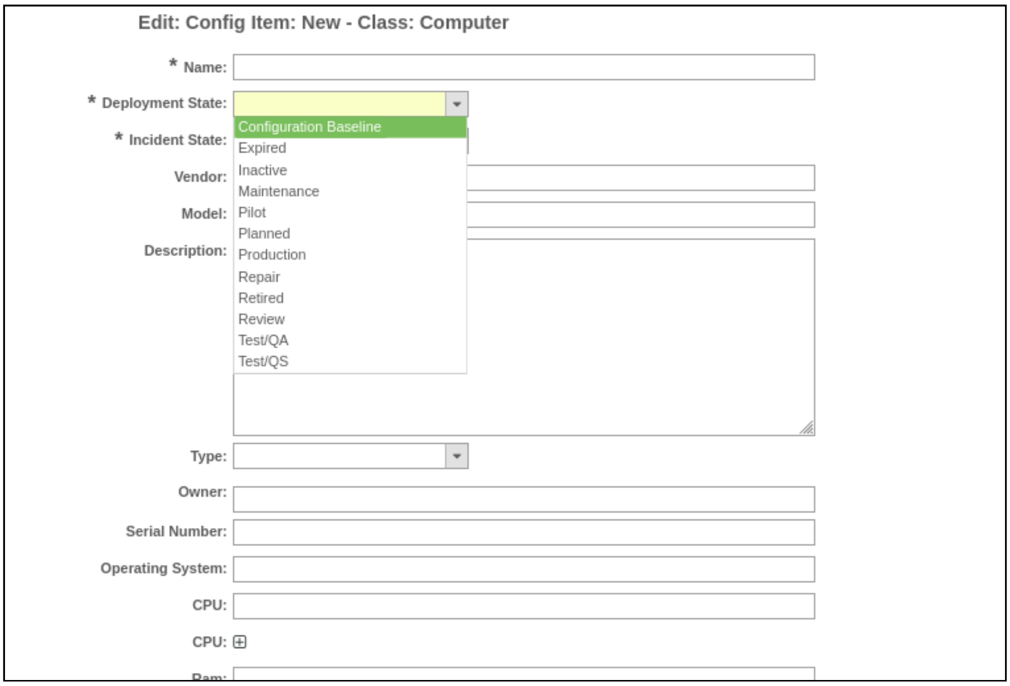


Figure: Edit Class Attributes Pop-Up

- Specify default attributes.
- In doing so, for *"Deployment State"* attribute, select: *"Configuration Baseline ".*
- Finally, click the "Submit" button.

Comparing ConfigItem with Default ConfigItem

- In the "CMDB" menu, select the "Overview" menu item. The ConfigItem overview opens.
- In the list, click on the ConfigItem that you want to compare with the standard configuration. The ConfigItem detail view opens:

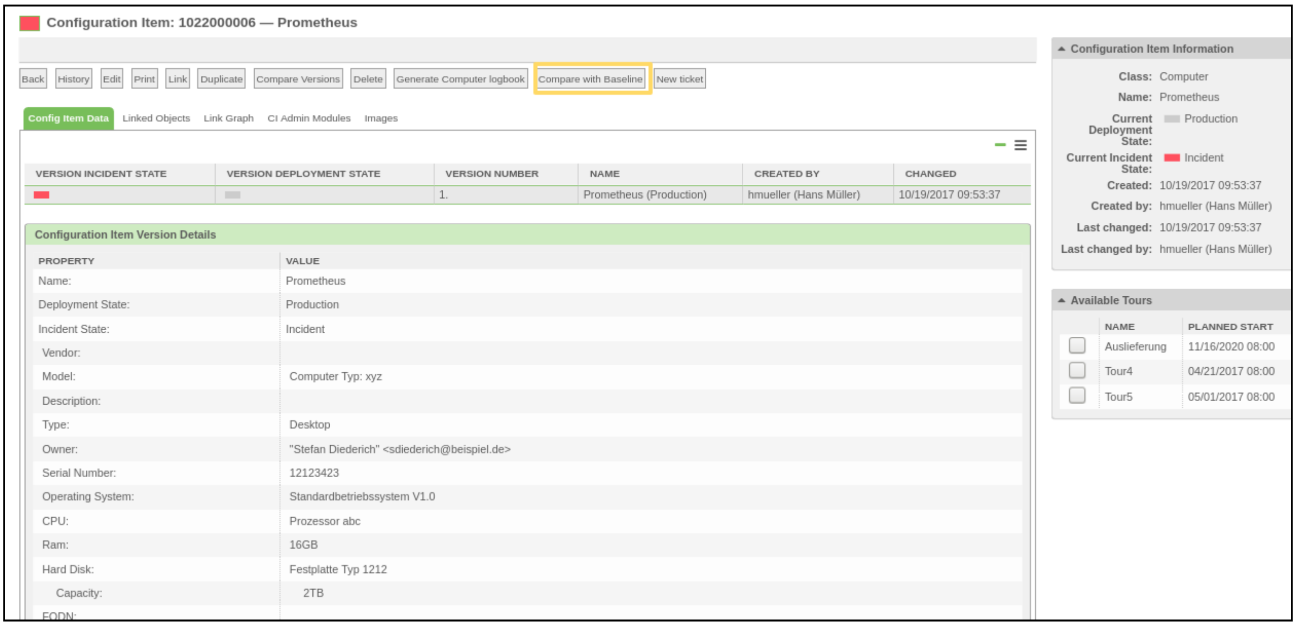
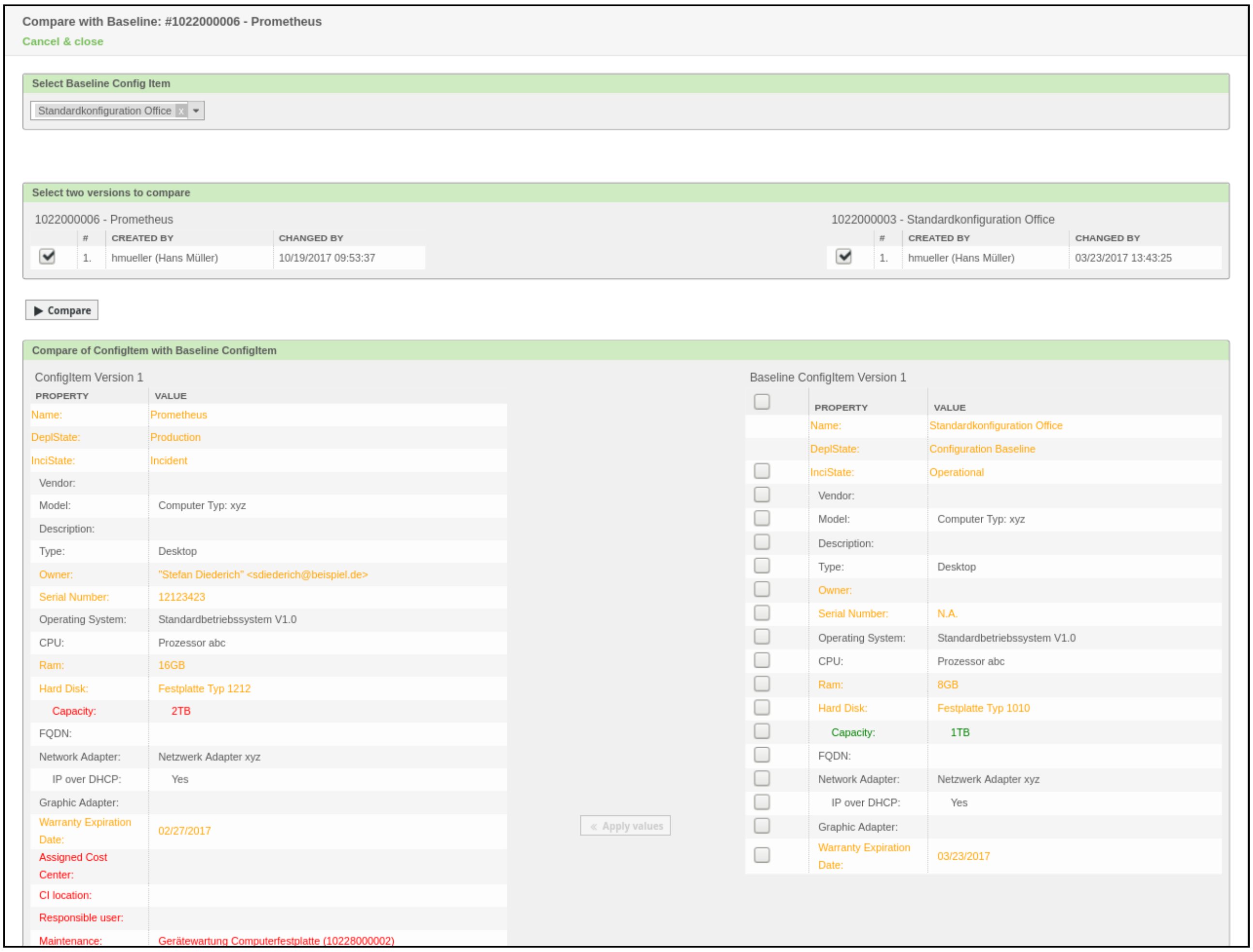


Figure: ConfigItem detail view with action "Compare with standard configuration"

- Click ConfigItem in list which you wish to compare with baseline configuration.

ConfigItem zoom view opens:



In the upper widget, select a standard configuration from the dropdown menu.

The comparison is then displayed in the lower widget, the deviations from the standard configuration are highlighted in color.

In the right-hand table you can select the values of the standard configuration which are to be adopted in the CI. Click the "Apply values" button.
The values are adopted according to the selection and the tables are updated.

Note

You will also see undefined values compared to two CIs. For comparison with the standard configuration, this means:

- If an attribute is undefined in one version and empty in the other (independent of direction), this is displayed as equal / unchanged. (black font)
- If the left attribute is undefined and the right attribute is set with a value, it is displayed as added. (green font)
- If the left attribute is set with a value and the right attribute is undefined, it is displayed as removed. (Red font)

The same applies when looking at different versions.

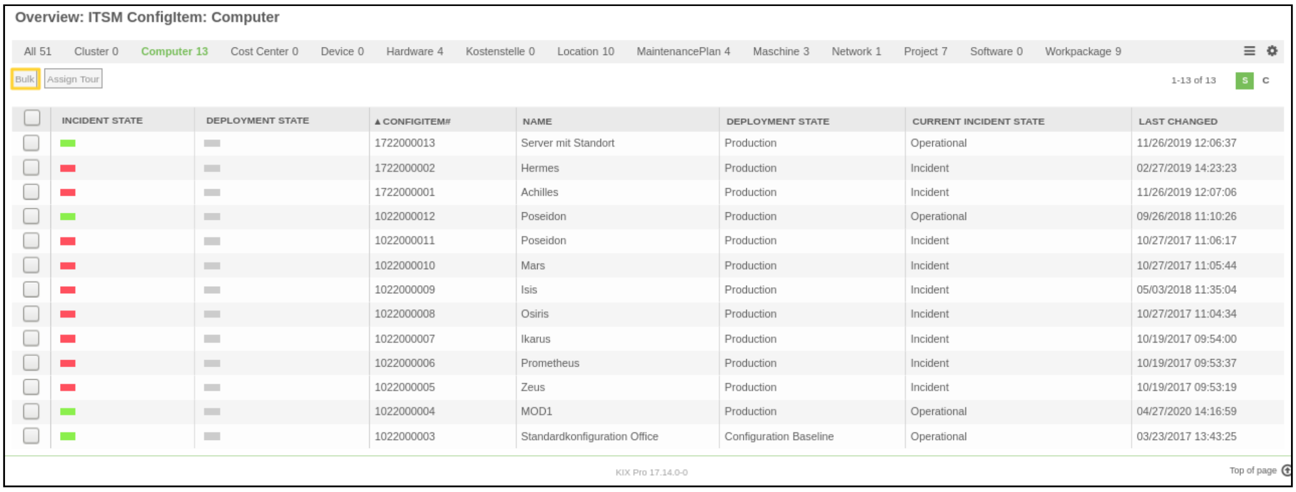
3.1.2 Extended ConfigItem Bulk Action

With *"ITSM ConfigItem Bulk"* extended function, you have the option to change attributes of multiple ConfigItems of a class. This is useful, for example, if operating system was updated for multiple computers, etc.

> ⓘ When changing a class attribute, the old attribute is not supplemented, but rather overwritten.

Executing ConfigItem Bulk Action

In *"CMDB"* main menu, select *"Overview"*.
ConfigItem overview is shown:



Overview: ITSM ConfigItem: Computer

All 51 | Cluster 0 | Computer 13 | Cost Center 0 | Device 0 | Hardware 4 | Kostenstelle 0 | Location 10 | MaintenancePlan 4 | Maschine 3 | Network 1 | Project 7 | Software 0 | Workpackage 9

Bulk | Assign Tour — 1-13 of 13

INCIDENT STATE	DEPLOYMENT STATE	▲CONFIGITEM#	NAME	DEPLOYMENT STATE	CURRENT INCIDENT STATE	LAST CHANGED
		1722000013	Server mit Standort	Production	Operational	11/26/2019 12:06:37
		1722000002	Hermes	Production	Incident	02/27/2019 14:23:23
		1722000001	Achilles	Production	Incident	11/26/2019 12:07:06
		1022000012	Poseidon	Production	Operational	09/26/2018 11:10:26
		1022000011	Poseidon	Production	Incident	10/27/2017 11:06:17
		1022000010	Mars	Production	Incident	10/27/2017 11:05:44
		1022000009	Isis	Production	Incident	05/03/2018 11:35:04
		1022000008	Osiris	Production	Incident	10/27/2017 11:04:34
		1022000007	Ikarus	Production	Incident	10/19/2017 09:54:00
		1022000006	Prometheus	Production	Incident	10/19/2017 09:53:37
		1022000005	Zeus	Production	Incident	10/19/2017 09:53:19
		1022000004	MOD1	Production	Operational	04/27/2020 14:16:59
		1022000003	Standardkonfiguration Office	Configuration Baseline	Operational	03/23/2017 13:43:25

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Figure: ConfigItem Overview

Mark the ConfigItems for which you wish to change attributes .
Click "Bulk" button.

"ITSM ConfigItem Bulk Action" pop-up opens:

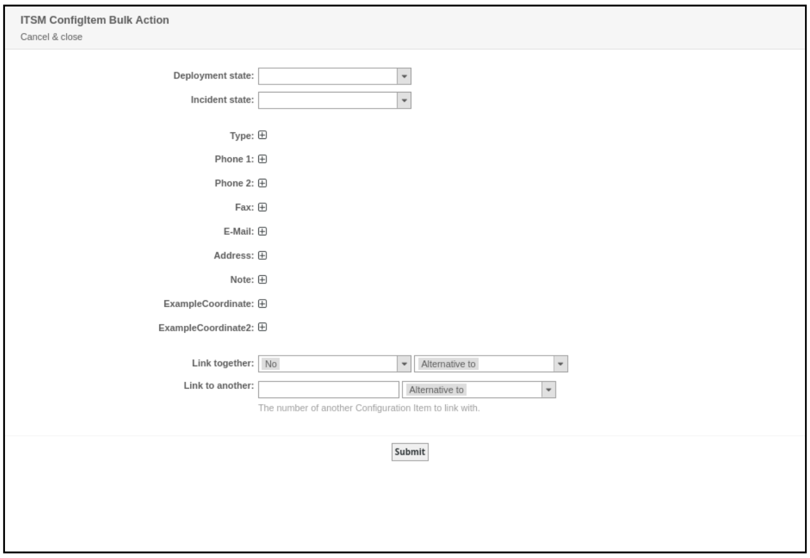


Figure: ITSM ConfigItem Bulk Action

Change or edit attributes.

Finally, click "Submit" button.

3.1.3 Device Logbook

The KIX Professional *"Device Logbook"* function offers the option to output information about ConfigItems as a PDF. In doing so, PDF will be divided into chapters.
Function is useful, for example, if information about ConfigItems is to be shared outside of KIX. The following are examples of information which can be depicted in chapter format:

- Attributes of a ConfigItem
- Tickets, including articles and ticket lists, which are linked to the ConfigItem (e.g. incident tickets)
- Information about customer contact, contact person

Information which is to be output in the PDF is specified in Admin area of KIX. In KIX Professional factory settings, logbooks have already been defined in Admin area for the following ConfigItem classes:

- ConfigItem class *"Computer"*
- ConfigItem class *"Hardware"*
- ConfigItem class *"Location"*
- ConfigItem class *"Network"*
- ConfigItem class *"Software"*

Button for creating a device logbook is located in the zoom view of a ConfigItem. Depending on ConfigItem class in which ConfigItem is located, button is called *"Generate_\[class name\] logbook"{_}. E.g. _"Generate_Hardware logbook"*

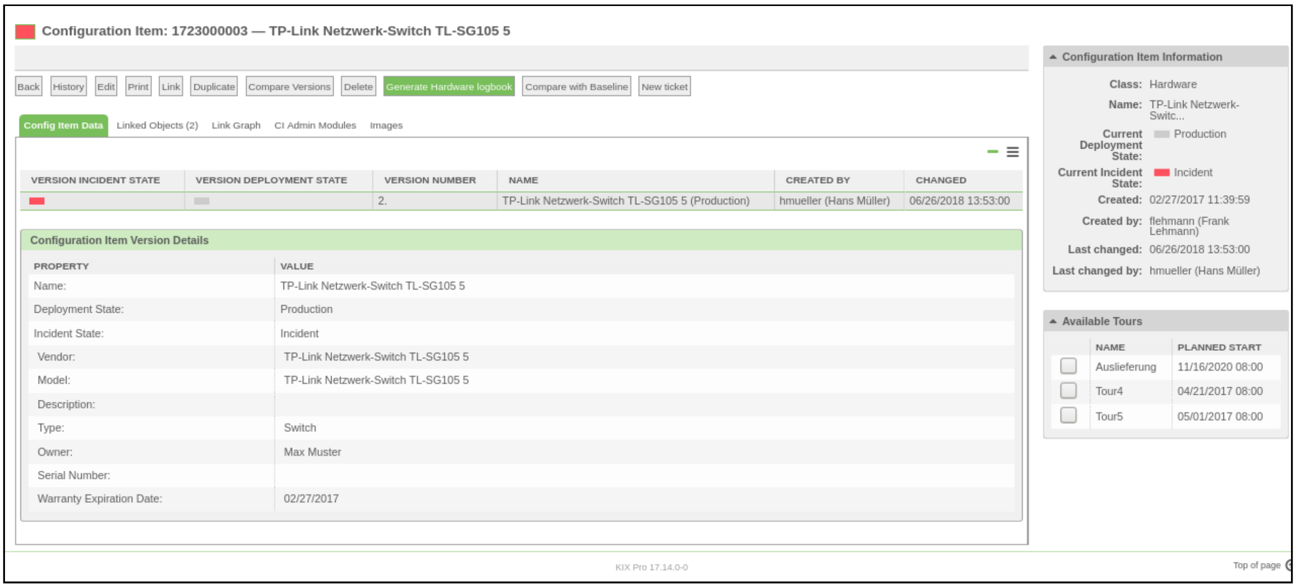


Figure: Zoom View of ConfigItem with "Generate Hardware logbook" Button

After clicking button, a pop-up appears on screen. Here, use ☑ to select which chapters are to be included in PDF.

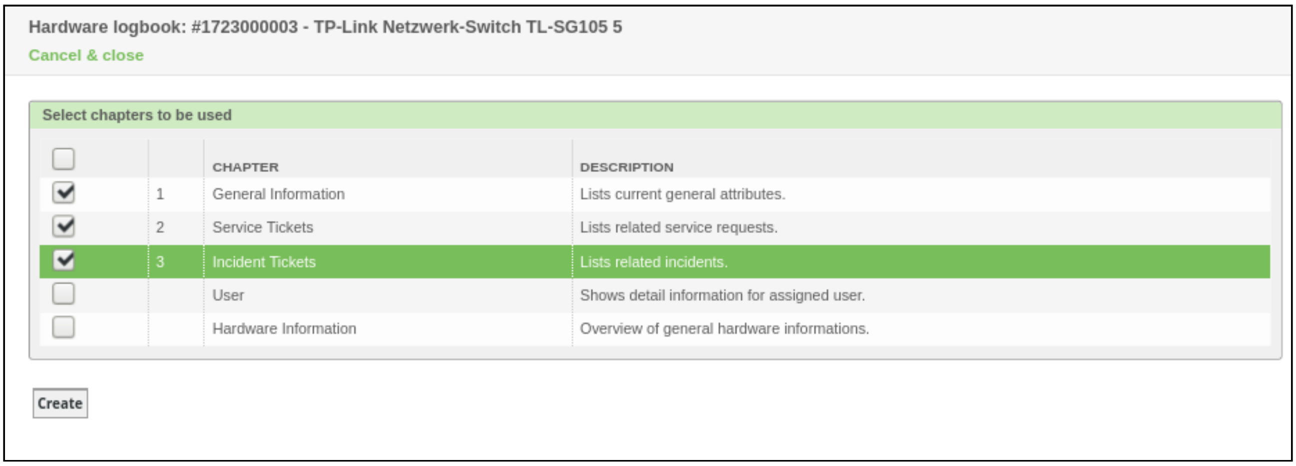


Figure: Chapter Selection Pop-Up

Click *"Create"* button after selection to create PDF output.

3.1.4 Inventory Sync

In the "CMDB" main menu, click on "Inventory Sync".

- Select the source of the data from the "Source Selection" drop-down menu.
- If necessary, enter a value in the "Filter" field. The filter restricts the list given by the source system.
- In the drop-down menu "Preselection CI class", select a CI class of the target system KIX with which the data should be synchronized.
- Click the "Start Synchronization" button.

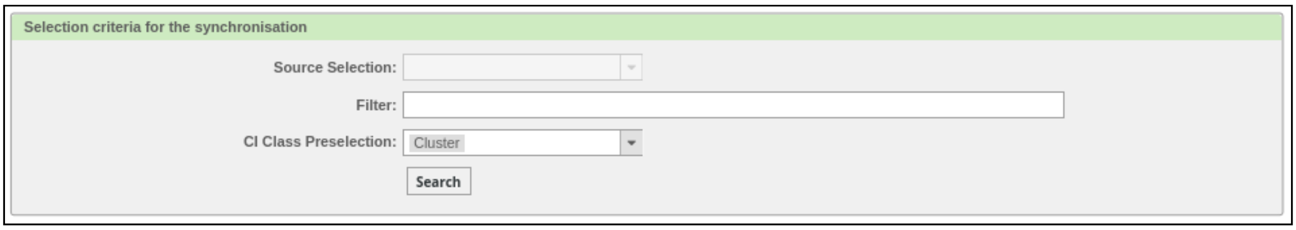


Figure: Search criteria for synchronization

- Found objects are displayed in the Found Objects widget.
- Select the objects that you want to synchronize.
- Click the "Start Synchronization" button.
- The "Result of synchronization" widget shows the results of the synchronization and any error messages.

3.1.5 Inventory Import

- Select the source of the data from the "Source selection" drop-down menu.
- If necessary, enter a value in the "Filter" field. The filter restricts the list given by the source system.
- In the drop-down menu "Preselection CI class", select a CI class of the target system KIX into which the data to be imported is to be written.
- Click the Search button.

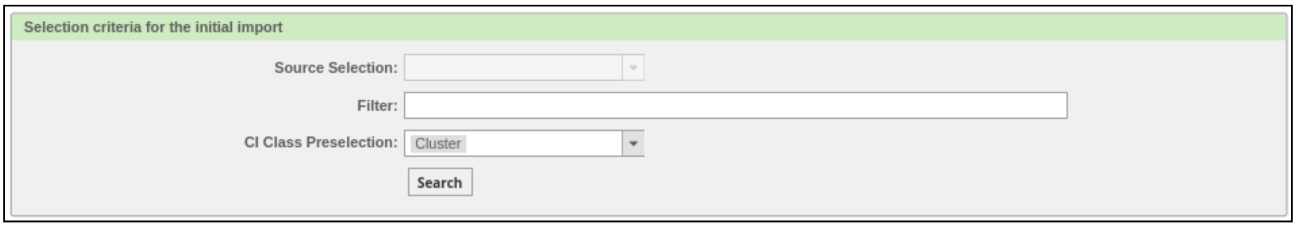


Figure: Selection Criteria Widget

Found objects are displayed in the Found Objects widget. Here you can use the dropdown menu to select the target class in KIX for each object found. This makes it possible to assign found objects to different classes if necessary.

- Finally click on the "Start import" button.
- The import is carried out and the results are displayed in the "Results of the import" widget. Here you can also have the results output as a text file.

3.1.6 CMDB Explorer

This function offers you a clear display of all CIs in a tree structure as well as the possibility of creating links and calling up the detailed view of individual CIs.

The Explorer is divided into three columns:

column	**content**	**example**
Tree structure of the CIs	All CIs stored in the system are mapped in their structures.	Computer → Name of the individual device
Contents of the tree structure Link graph	If you click on the generic term in the tree structure, you can see all the CIs it contains. If a specific CI is clicked, the link graph is displayed. This shows the links stored in the system between the current config item (in the orange frame) and other config items, ticket (s), services or other linked objects. Here you can see at a glance which devices are connected to which and who, for example, is still affected by a failure.	List of all devices in the "Computer" class Figure CMDB Explorer - link graph
Statistics Detail view	A statistical analysis of the CI class is shown here. Here you can see the detailed view of the selected config item including the option to edit it.	Config items per incident status Details on computer "Hermes"

3.2 Adjustments for Customer Management Module

The module has been renamed "Customers – Services – SLAs" and also has a function to assign an SLA (Service Level Agreement) to the customer, in addition to a service.

Figure: "Customer Management :: Customers-Services-SLAs" Module

A search can be performed in the list using the filter based on the following criteria:

- Service
- CustomerID
- SLA
- Contact login

Linking customers with services SLA

Click "*Add Customer-Service-SLA*" and the applicable dialog opens.

Figure: Add Customer-Service-SLA

In one step, you can now link both the service (mandatory information) as well as SLA to the customer (CustomerID – mandatory field) using the applicable drop-down menu.

To finish the process, click button "Submit".

3.3 Adjustments for Tickets Module

Attachment search

Ticket search – navigation item "Tickets" – Search – contains two fields to be able to search specifically for attachments: Attachment Name and Attachment Content.

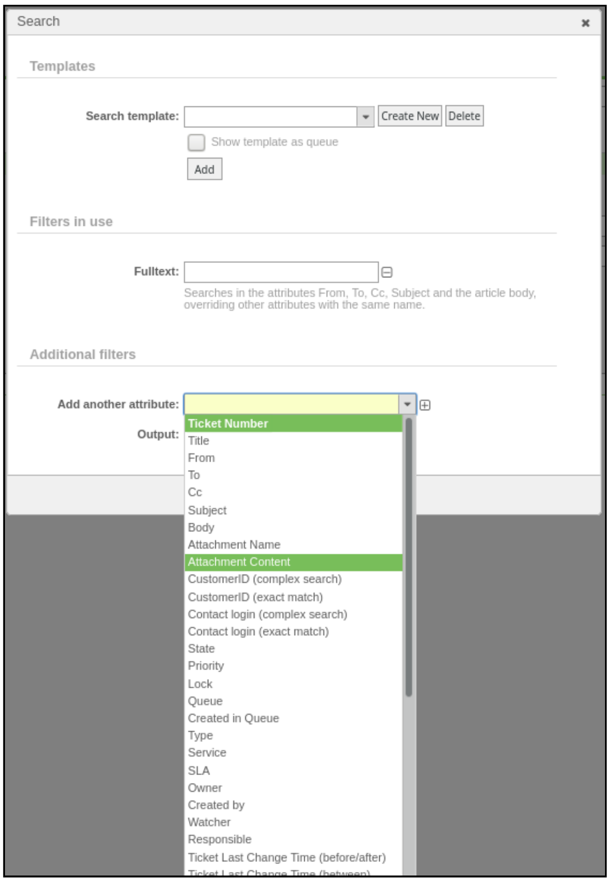


Figure: Dialog Ticket search - Attachment search

Duplicate display

When creating a new ticket, when entering the subject line, a dropdown with similar, already existing titles appears.

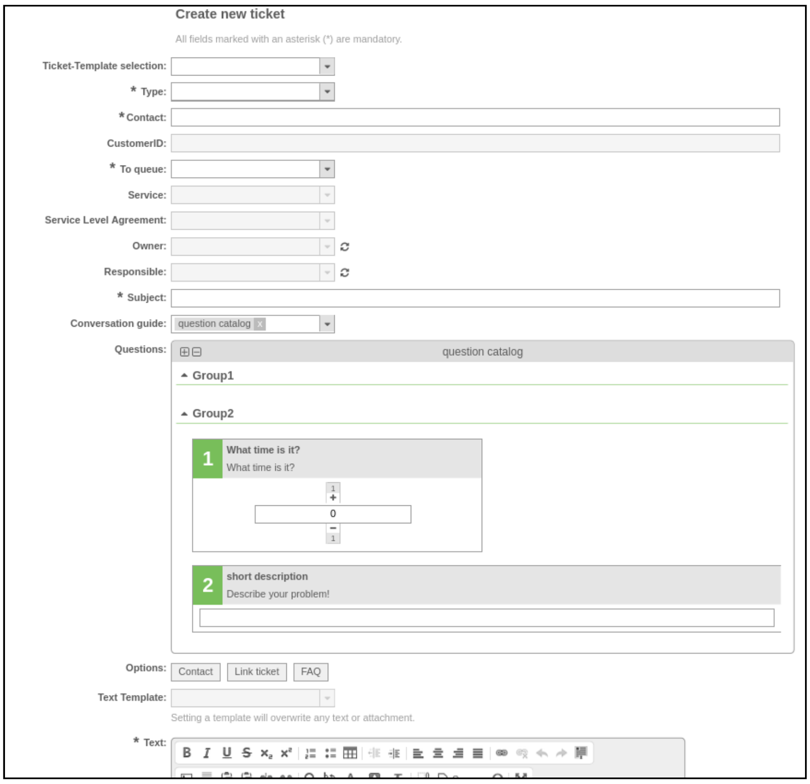
3.3.1 Conversation Guide

"Conversation guide" function offers option to insert defined questions with defined answer options into ticket during ticket creation. This function is useful, for example, if a contact flags a known technical problem for which there are known solutions.

In Admin area, you have the option to define questions and answer options. The conversation guides created this way can be used during ticket creation, both in agent as well as customer frontend.

Creating New Ticket with Conversation Guide

- In *"Tickets"* menu click *"New ticket"* menu item OR symbol in toolbar.
- *"Create new ticket"* pop-up will appear:



- In *"Conversation guide"* selection field, select pre-defined conversation guide.
- Answer questions which were defined in selected conversation guide.
- Carry out rest of steps for ticket creation.

"Conversation guide" Tab in Ticket Zoom View

- "*Conversation guide"* tab shows answers given by contact in question layout.

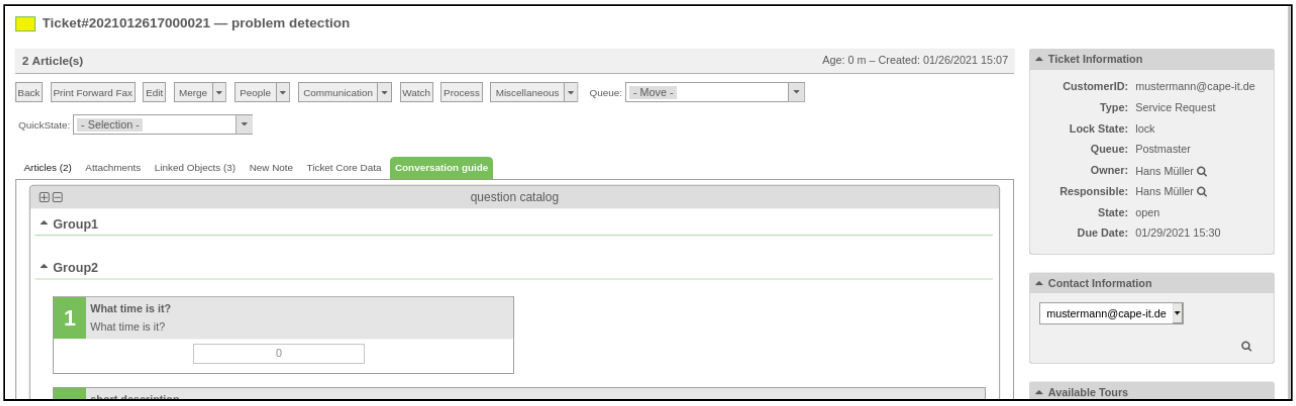


Figure: Conversation guides Tab in Ticket Zoom View

> **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.

3.3.2 Automatic Assignment of Owner / Responsible

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.

If you would like to activate this setting yourself, open personal settings (cog wheel at top right) and select the following item:

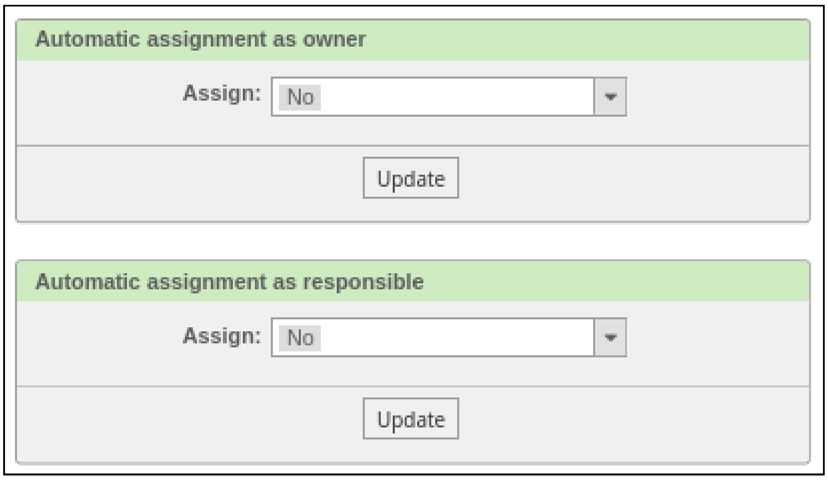
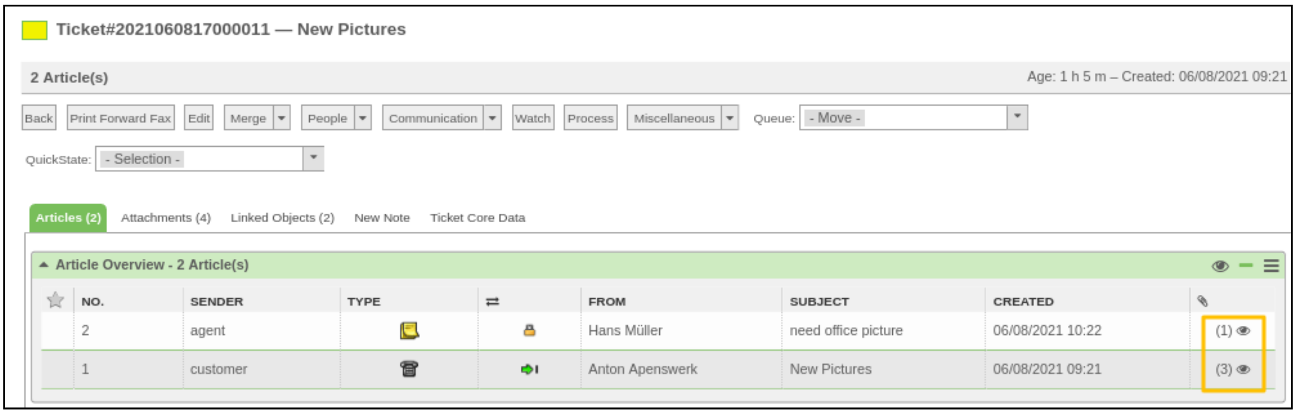


Figure: Personal Settings for Automatic Assignment

3.3.3 Preview for Article Attachments

The eye icon in article attachments column can be used to preview image files.



An overlay opens which shows the available images as a gallery. Left and right arrows can be used to navigate to the previous or next image. The dialog can be closed using the cross in the top right corner. If image downloading is active, this is enabled via an icon.

This is also possible for PDFs. Your admin must make settings for this.

Note: If Internet Explorer is used, an external PDF viewer that has browser support must be installed (e.g. Adobe).

3.3.4 Ticket detail view - show attachments from dynamic fields

In the ticket detail view behind the "Attachments" tab, there are attachments that have been attached to articles as well as attachments that have been attached to the ticket via a dynamic field.

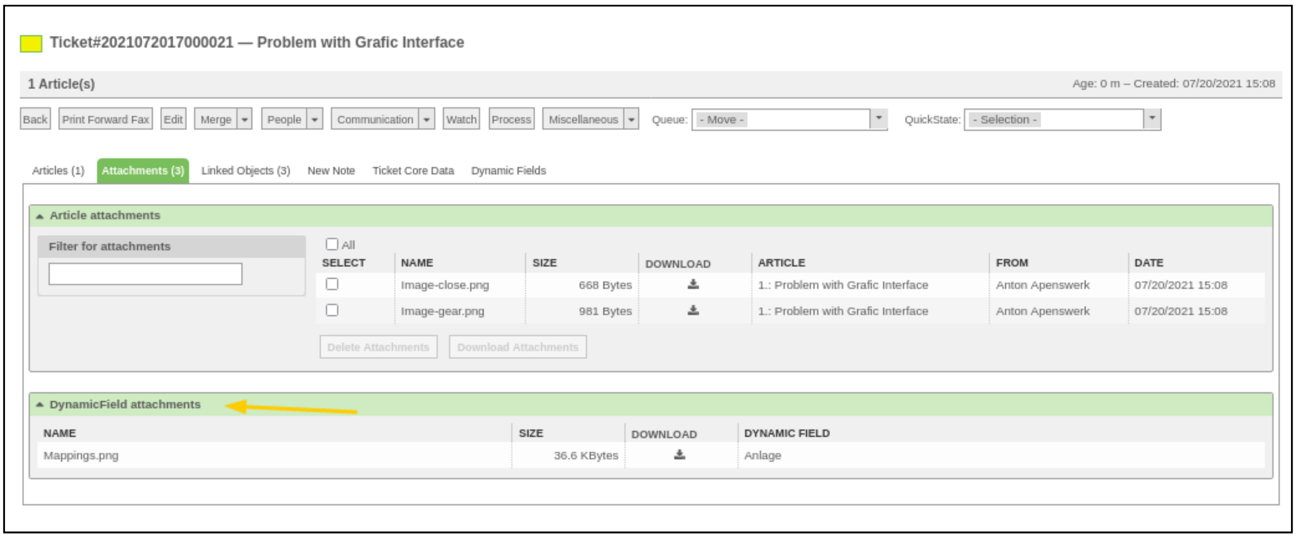


Fig .: Example ticket with attachments from an article and from a dynamic field.

3.4 File Exchange

In the "File Exchange" module you can exchange files in your KIX Pro.

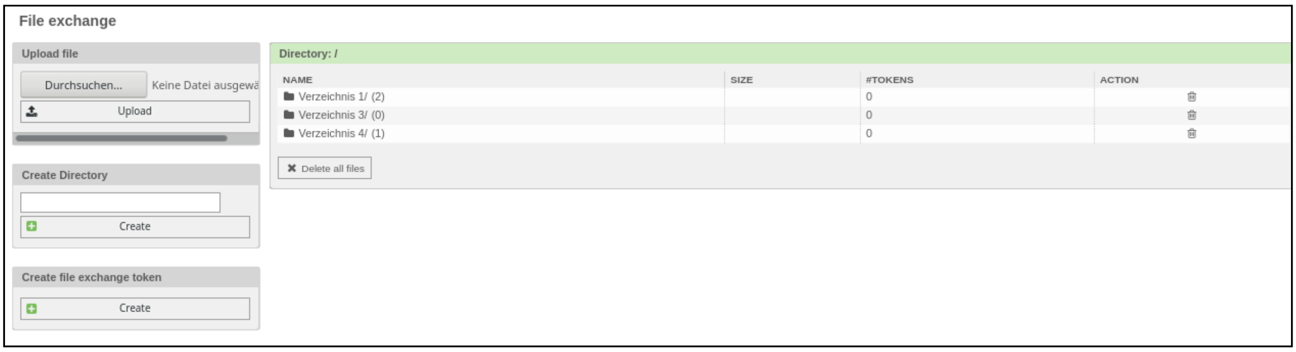
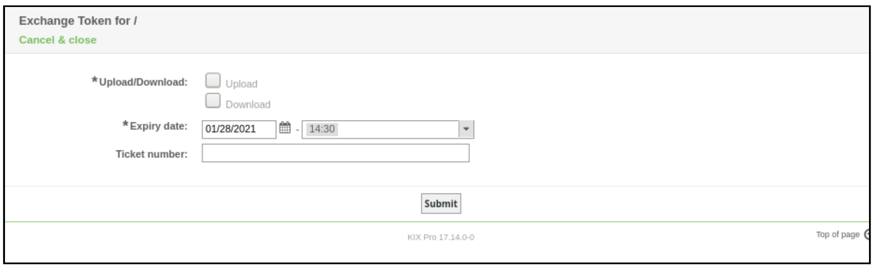


Figure: "File exchange" module

On the left margin you will find the actions that are available to you in this module. To the right of this is the list of all existing directories.

action	application
Upload file	Here you can upload your file (s) to KIX Pro.
Create directory	Enter a name and click on "Create" to create a new directory.
Create token for file exchange	When you click on this action, a pop-up opens:  • Select whether it is an upload of data or a download. • Enter the validity period of the token. • Link the process to a ticket by entering the ticket number. • Click on "Submit" to complete the process.

List of directories

- Click on a directory to get to the subdirectory with the data packages.
- By clicking on the top line "parent directory" you get back to the overview of all directories.
- By clicking the "Delete all files" button, you delete all data packets in the directory.

3.5 Calendar Module

In the "Event Calendar" module there is a calendar available for the agent which displays both event-based tickets, as well as private events.

Events from tickets

Planned maintenance start/Planned maintenance end fields are available when you create a ticket. If you complete these fields, and are also the "owner" or "responsible" person for this ticket, it will be shown in your calendar.

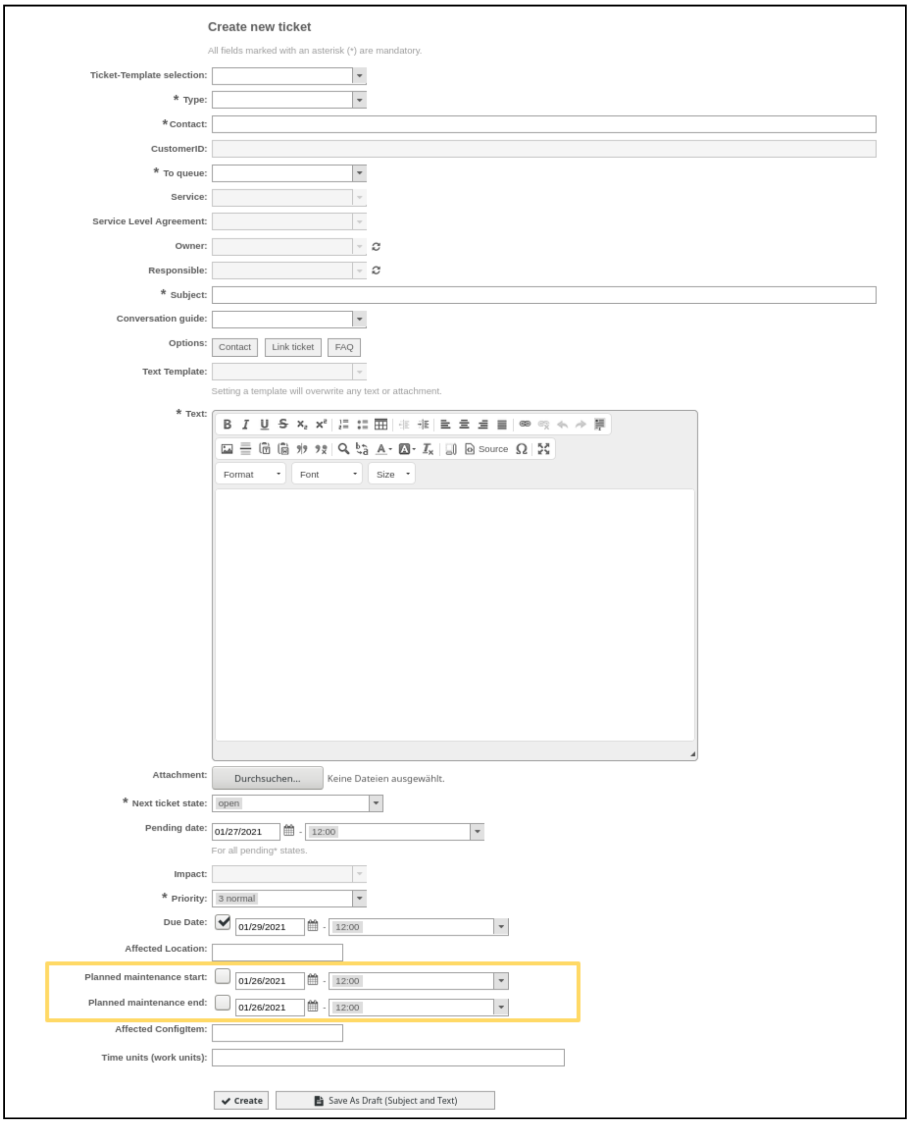


Figure: Start and End Time in a New Ticket Setting

Private event

You can also use the calendar to manage your private events. Click "Private Event" in the module. This opens a pop-up.

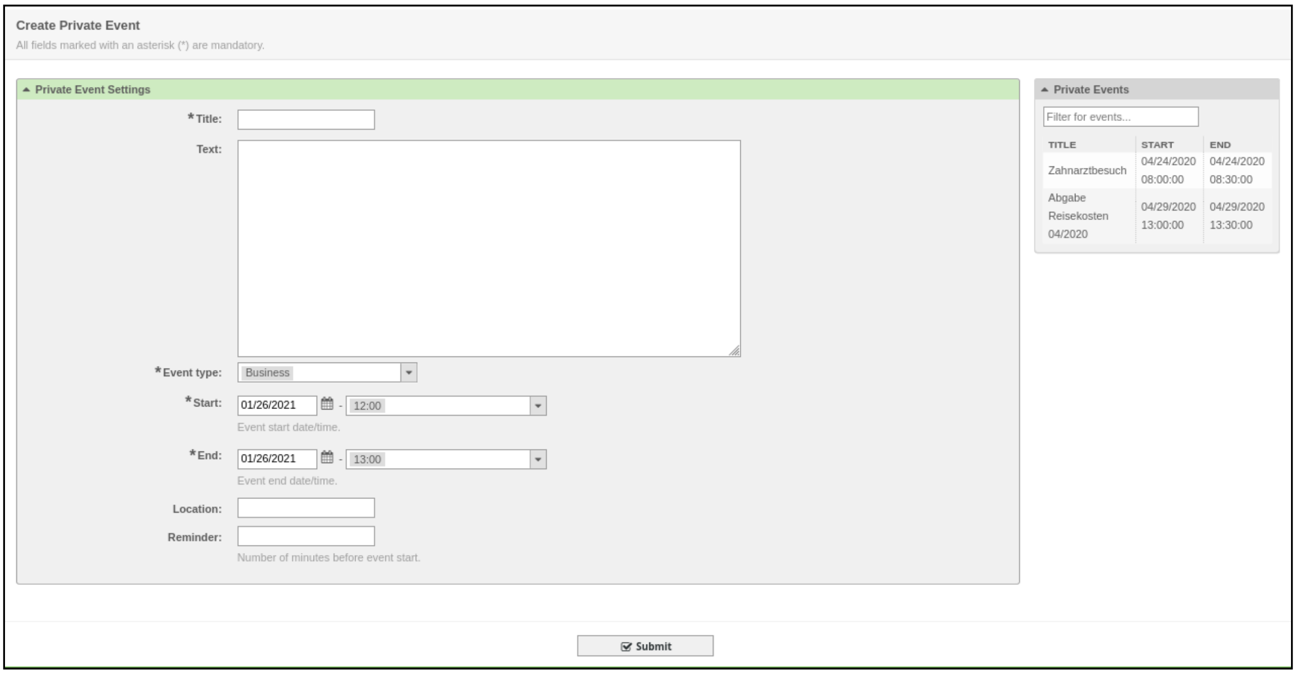


Figure: Creating a Private Event

3.6 Common changes

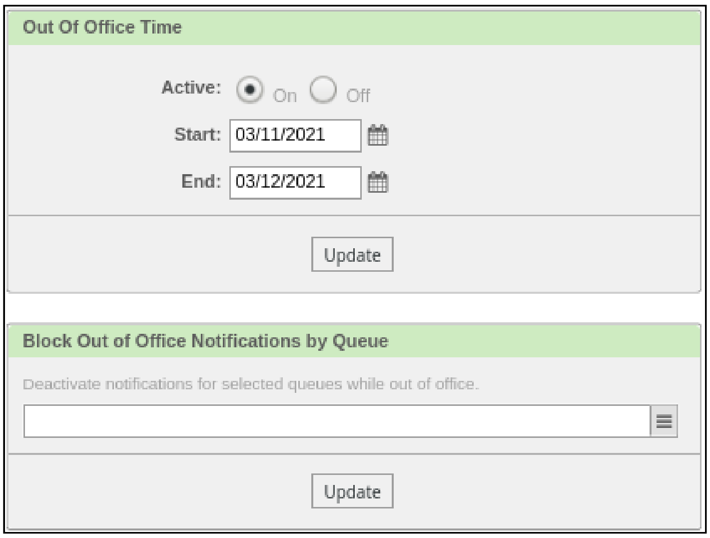
3.6.1 Showing Updates

The system allows your administrator to share central news or updates both in the customer frontend, as well as in the agent frontend.

Example of an update in the login area:

3.6.2 Out of Office - set queues without notification

You have the option of setting an "Out of Office Time" via "Personal Settings". If this "Out of Office Time" is set active, another form field opens with the title "Block Out of Office Notifications by Queue". This includes a queue selection (analogous to the selection for "My queues") which you can use to deactivate notifications during your absence.



If a notification is sent to you during your absence and the ticket is in one of the queues that have been deactivated by selection, you will NOT receive a notification. However, if you have hired a substitute for the period of absence (form field "Out Of Office Substitute"), the substitute receives the notification. This process can be traced via the ticket history.

4 Liability Disclaimer for KIX Pro

4.1 Liability for Contents

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KIX Pro is not suitable, intended or approved for the identification, prevention, monitoring, treatment, relief or compensation of illnesses, injuries and disabilities. KIX Pro is also not intended for the examination, replacement or modification of the anatomical structure or of a physiological process. KIX Pro must also not be used to directly control a diagnostic or therapeutic product. Furthermore, KIX Pro 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 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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