



KIX Pro

KIX 18 User 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 18**. For a description of all basic functions, please refer to the manual for KIX Start 18.

The manual for administrators can be found at <https://docs.kixdesk.com/>, as well as all other documentation on KIX Start 17 and KIX Pro 17.

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.

 This edition of the manual refers to release KIX 18.32.

1.1 To comprehension

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

2 Home Dashboard - Enhanced Functions

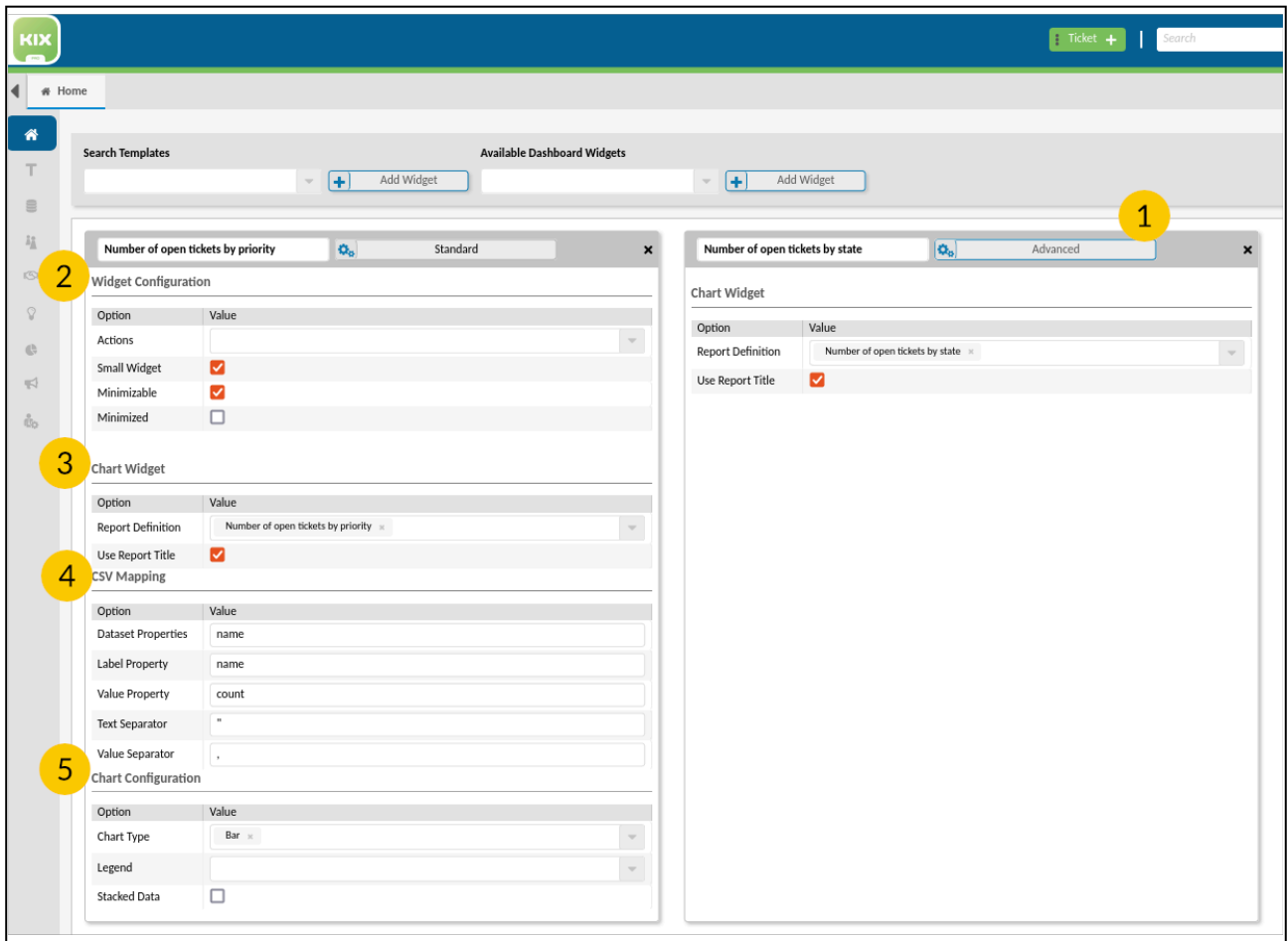
Adapt the Home Dashboard to your needs so that you have all the important key figures at a glance.

This is done using report definitions created in the system, which serve as the data basis for the statistics widget. The most recently created report is displayed as a statistic. First, go to the "Reporting" menu item and create the report you want for the statistics in CSV or JSON format.

If the statistics widget is not based on a report, you will see this message:



At the bottom of the Home Dashboard, click the "Customize Dashboard" button. An overview of all configuration options opens:



	Settings for field	Option	Description
1	Advanced button and chart widget	"Advanced" button	Click the "Advanced" button to open the individual setting options.
		Report definition	Here you can see which report definition is selected for display as statistics. Change this if necessary. Click on the arrow at the end of the field to open the selection menu. All report definitions available in the system are available for selection.
		Use Report Title	By ticking the box, you name the widget exactly like the selected statistic.

	Settings for field	Option	Description
2	Widget Configuration	Actions	From the dropdown menu, select which actions should be available in the header area of your table. By clicking the "Apply" button you save your selection. Select several options from the list, first click on "Apply" and then on the "Add column(s)" button.
		Small Widget	You can adjust the size of the widget by checking the box. If the checkmark is set, the widget is displayed in the small view. If the checkbox is empty, the widget is displayed large.
		Minimizable	Determines whether the widget can be reduced in size. The next field can only be selected if a tick is set here.
		Minimized	The selection determines whether the widget is initially reduced/collapsed.
3	Chart Widget	Report definition	Here you can see which report definition is selected for display as statistics. Change this if necessary. Click on the arrow at the end of the field to open the selection menu. All report definitions available in the system are available for selection.
		Use Report Title	By ticking the box, you name the widget exactly like the selected statistic.
4	CSV Mapping	Dataset Properties	Enter the designation of the columns (e.g. in the CSV file) that are to be displayed in the diagram as a data set.

	Settings for field	Option	Description
		Label Properties	Enter the name of the column (e.g. in the CSV file) that contains the Y-axis label.
		Value Properties	Enter the designation of the columns (e.g. in the CSV file) that contain the values of the data record.
		Text Separator	Separator used for character strings: " (double inverted comma)
		Value Separator	Separator for values in output format: , (comma)
5	Chart Configuration	Chart Type	Choose from the following chart types in which form you want your statistics to be displayed: <ul style="list-style-type: none"> • Bar • Bubble • Line • Pie • Polar Area • Radar
		Legend	Specify where within the widget the legend for your chart should appear. <ul style="list-style-type: none"> • Bottom • Left • Right • Top
		Stacked Data	If the report contains several data references, you can display them in a (stacked) data series. To do this, tick the box.

3 Toolbar - Enhanced Functions

3.1 Personal Settings

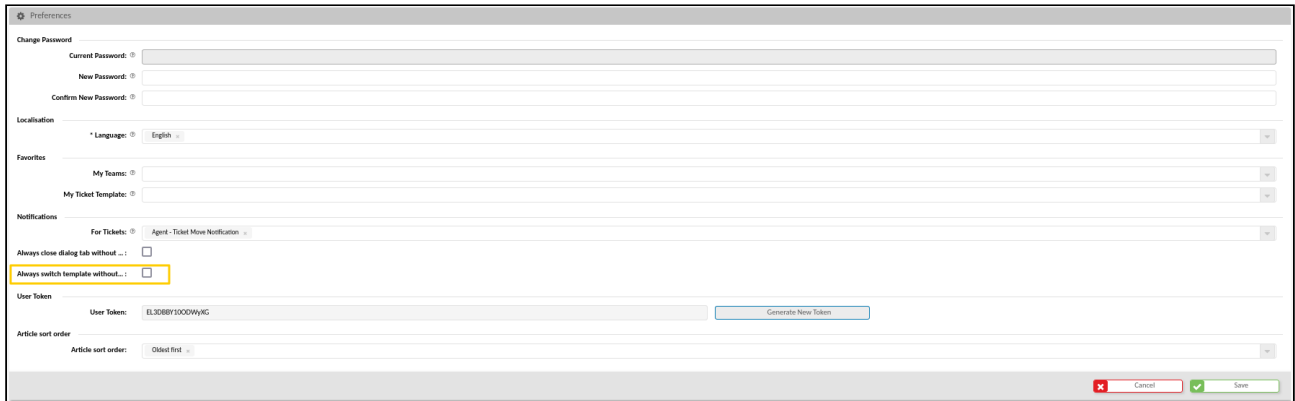


Fig.: Personal settings

3.2 Always switch template without asking

If the template is changed when working in the ticket creation mask, a message appears indicating that the data already entered will be lost. You have the option of deactivating this reminder.

If necessary, the reminder can be reactivated in the personal settings. To do this, tick the box.

3.3 User Token

Users with access to the agent portal receive a personal token. This can be used in queries to authenticate the user.

You can regenerate the token at any time using the "Generate new token" button, for example if there is a suspicion that unauthorized third parties have gained knowledge of the token.



Use:

The reporting of KIX Pro uses the user token to create a URL for each output format together with the token of the report definition. This URL can be used to import reports into third-party systems (e.g. MS Excel) without additional user authentication.



4 Ticket – Enhanced Functions

KIX Pro provides you with additional functions that you can use to modify tickets and their properties. These include, among others:

Templates

Templates help to lighten your workload. Depending on the application scenario, your administrator provides you with a range of templates that you can use when creating new tickets in KIX Pro.

Configurable ticket actions & Quick Actions

Your administrator can configure special actions for tickets so they fit better into your work processes or enable you to execute actions with one click (=Quick Actions).


Time accounting

You have the option of entering your time expenditure directly on the ticket.

Team View Modes

In the ticket dashboard you can switch between different views, e.g. choose List or Kanban.

4.1 Creating a ticket

Similar to KIX Start, click  in the header of the Home Dashboard or the Ticket Dashboard to create a new ticket. A tab will then open:

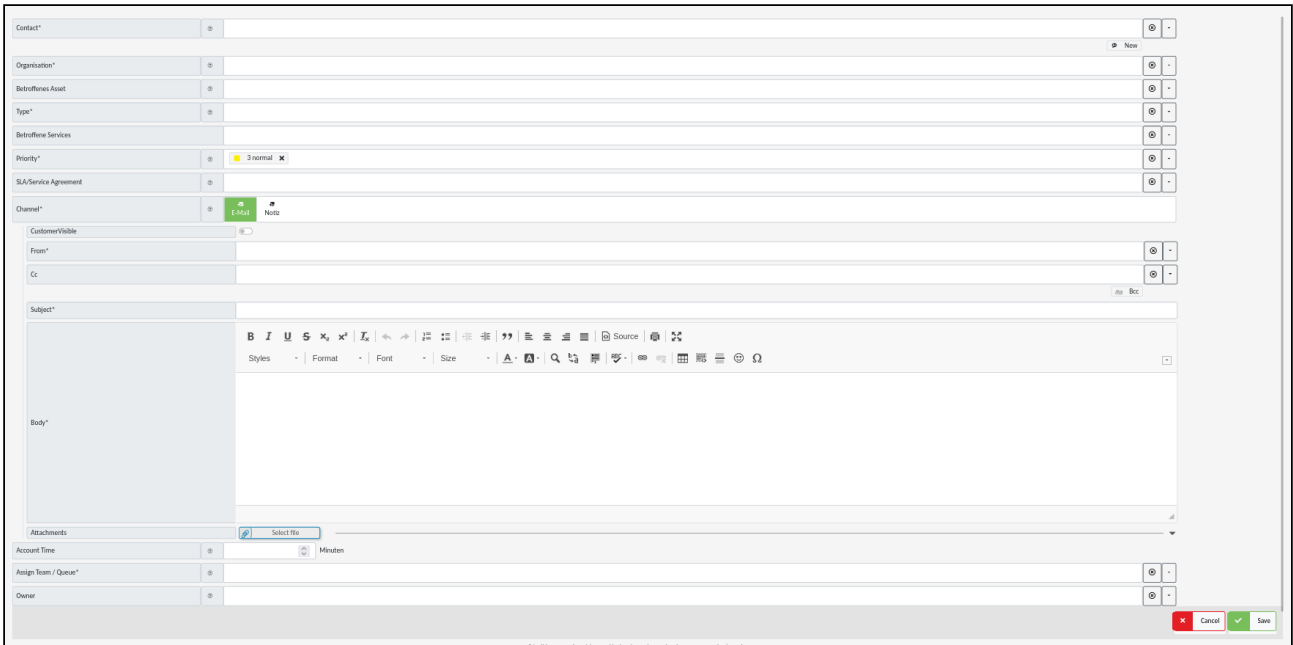


Fig.: Form "New Ticket" in KIX Pro

Work through the individual lines step by step. Fields with a "*" are mandatory and must be filled out.

If there is an arrow pointing down to the right of the field to be filled in, a selection menu opens when you click in the field.

In addition to the form fields in KIX Start, there are also:

Affected Services	Select any affected services here.
SLA/Service Agreement	Enter any affected SLA or service agreements here. These are then linked to the ticket. <ul style="list-style-type: none"> You can search for the name of the SLA.
Account Time	Here you can record the working hours that have been spent on this ticket so far. Basically, the times are stored in minutes. Adjustment postings are possible by specifying a negative posting (e.g. input -15).


4.2 Creating tickets with Templates

Templates help to lighten your workload. Depending on the application scenario, your administrator provides you with a range of templates that you can use when creating new tickets in KIX Pro. Data that you frequently have to enter can be made available in pre-populated form by using templates. Data that you do not need for your own work, but which may be relevant for your colleagues at a later step, can be saved in the background. This makes it faster to create tickets, and you can concentrate on the relevant fields.

4.2.1 Working with Templates

To create a ticket using templates click "+NEW" as usual in the header of the Home Dashboard. The New Object dialog then opens. Here, select the first tab "New Ticket". To see how to complete the fields of a standard ticket form, please refer to the documentation for KIX Start, in the Chapter "How to Create and Edit a Ticket". The following only outlines the use and effects of templates.

By default, the "Template" form field is at the top of the form for creating new tickets. If you select a template, the input form may change: It is possible that form fields disappear or that form fields have already been filled out.

 If the template is changed when working in the ticket creation mask, a message appears indicating that the data already entered will be lost. You have the option of deactivating this reminder. If necessary, the reminder can be reactivated in the personal settings.

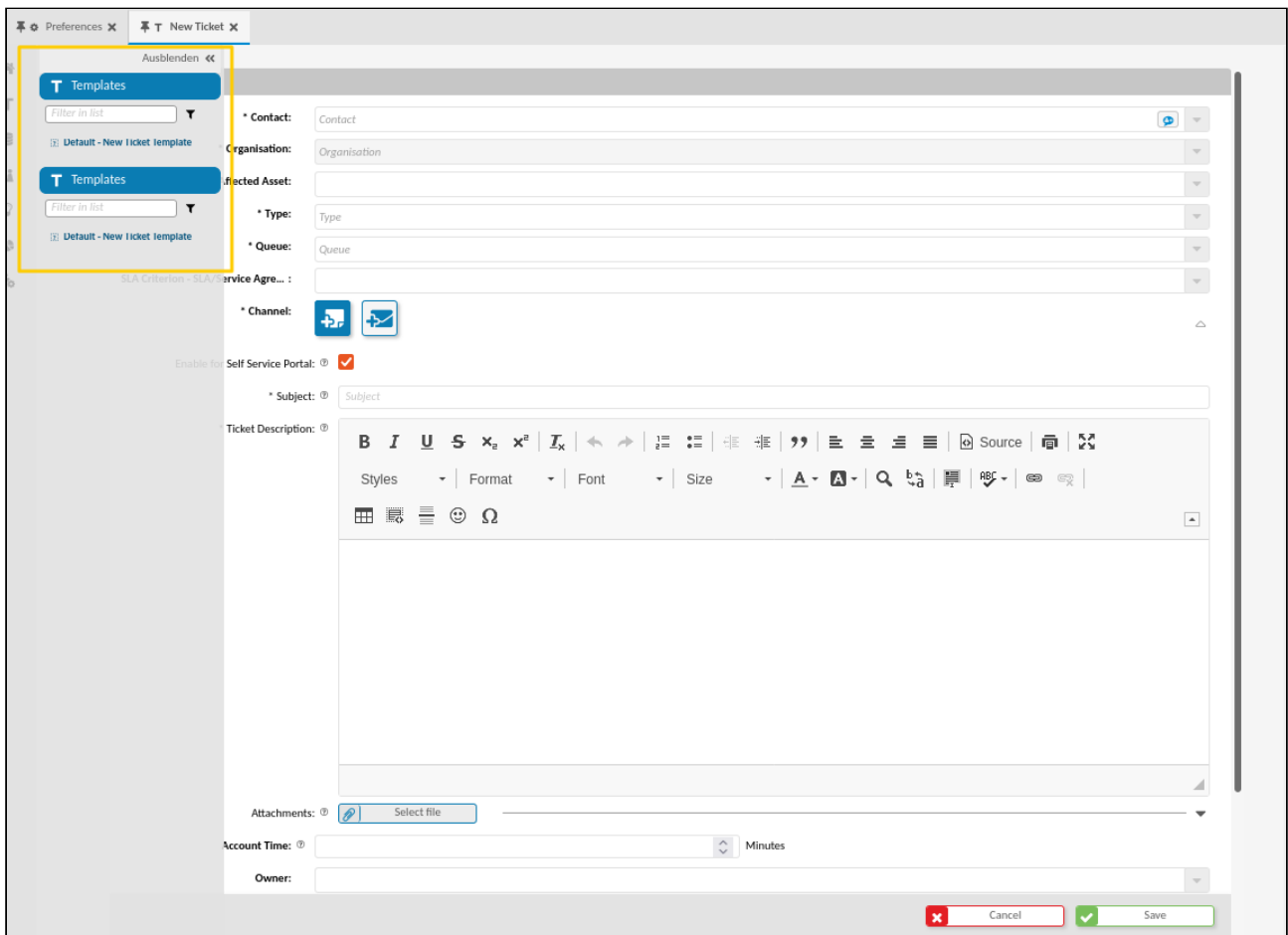


Fig.: "New Ticket" Dialog with Template position

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.

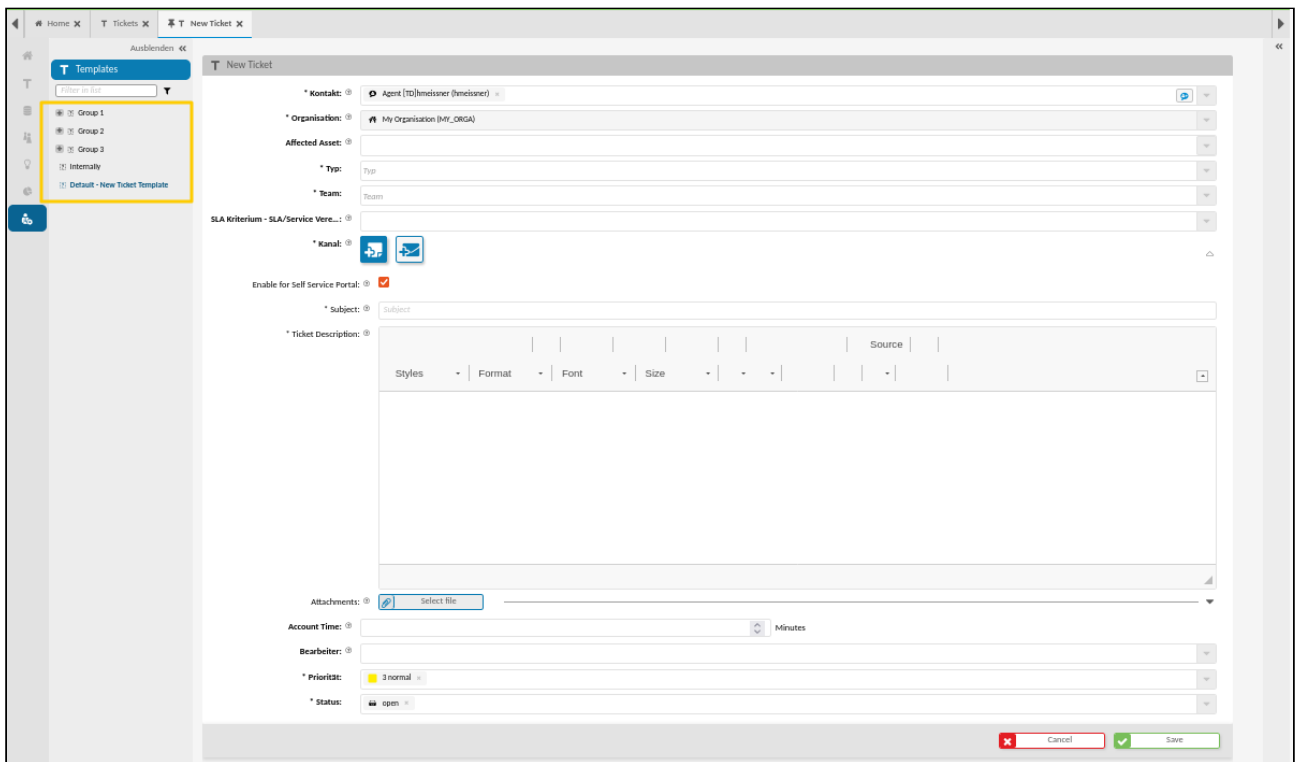



Fig. : Template tree structure with the "New Ticket" dialog open

4.2.1.1 Effect of a Template

When a template is used to create a ticket...

Impact	Explanation
... fields in the New Ticket dialog may already be pre-populated.	The fields are shown on the form. The pre-populated value can be retained, modified, or supplemented.
... fields in the New Ticket dialog may be locked.	The fields are shown on the form, but cannot be changed.
... fields may be populated in the background.	The fields are not shown on the form. The data saved in the template is set in the background and displayed once the form is saved in the ticket zoom view.

 **Hint**

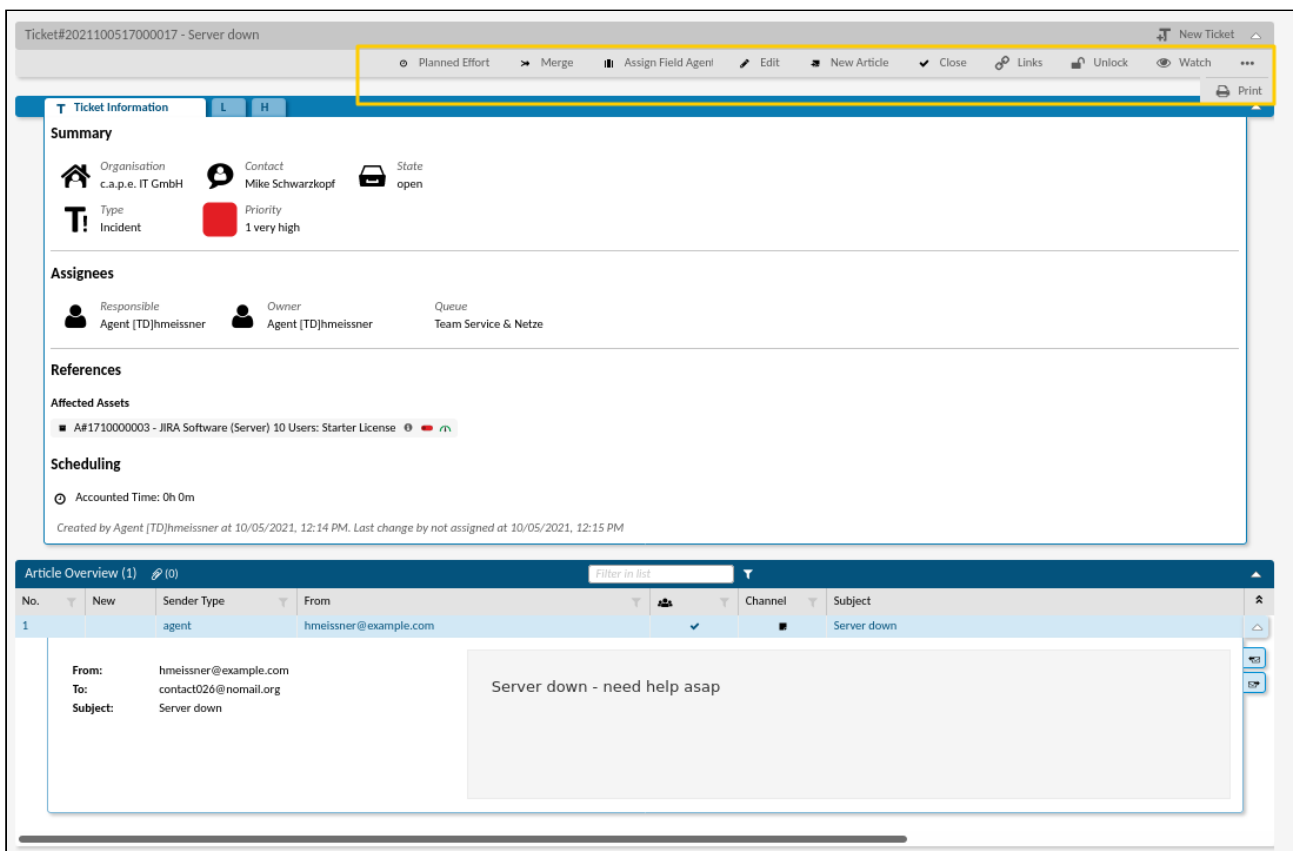
It is possible to call up a ticket template via a URL link. Use the format "... /tickets?new&templateId=<ID> " for this.

4.3 Other Ticket Actions

Content on this page:

- [Merge Ticket](#) (see page 17)
- [Close Ticket](#) (see page 18)
- [Article actions within the ticket](#) (see page 19)
 - [Edit Article](#) (see page 19)
 - [Delete Article](#) (see page 20)
 - [Split Ticket](#) (see page 20)
- [Canceling Ticket Action](#) (see page 21)
- [Create FAQ from ticket](#) (see page 22)

In addition to the ticket actions already described for KIX 18 Start, the following are also available in KIX 18 Pro:



The screenshot displays the KIX 18 Pro interface for a ticket titled "Ticket#2021100517000017 - Server down". A yellow box highlights the top navigation bar containing the following actions: Planned Effort, Merge, Assign Field Agent, Edit, New Article, Close, Links, Unlock, Watch, and Print. Below this, the "Ticket Information" section is visible, including a "Summary" card with details like Organisation (c.a.p.e. IT GmbH), Contact (Mike Schwarzkopf), State (open), Type (Incident), and Priority (1 very high). The "Assignees" section shows the responsible agent (Agent [TD]hmeissner) and the queue (Team Service & Netze). The "References" section lists affected assets, such as "A#1710000003 - JIRA Software (Server) 10 Users: Starter License". The "Scheduling" section shows an accounted time of 0h 0m. At the bottom, the "Article Overview" section shows a list of articles with columns for No., New, Sender Type, From, Channel, and Subject. The first article is from "hmeissner@example.com" with the subject "Server down". The article content shows a message: "Server down - need help asap".

4.3.1 Merge Ticket

If an email did not land on the correct ticket or was sent to the wrong email address, you can use "Merge" to combine the misdirected ticket with the correct process. After clicking the Merge button, a new window opens.



Fig. : Merge dialog

Select the ticket with which your "wrong runner" should be summarized. If you do not have the ticket number ready, enter at least 3 characters of the ticket title or a keyword in the title. You will see a result list from which you can choose.

The channel via which the tickets are grouped is also available. That is, when summarizing, either

- put a note on the exit ticket,
 - If you select this channel, the Create note function opens. Here you can also choose whether the note should be displayed in the Self Service Portal.
- an email is deposited on the exit ticket
 - If you choose this channel, the email function opens. Here you can also choose whether the email should be displayed in the Self Service Portal.
- or no article created.

With this action, the items on the outgoing ticket are moved to the destination ticket and are no longer available on the outgoing ticket. Only one article remains on the exit ticket that says "Ticket merged to <number of the new ticket>". On the one hand, this makes follow-up maintenance low and, on the other hand, the action is traceable.

4.3.2 Close Ticket

The action is available in the ticket zoom view.

Click the action and a dialog opens to edit the ticket.

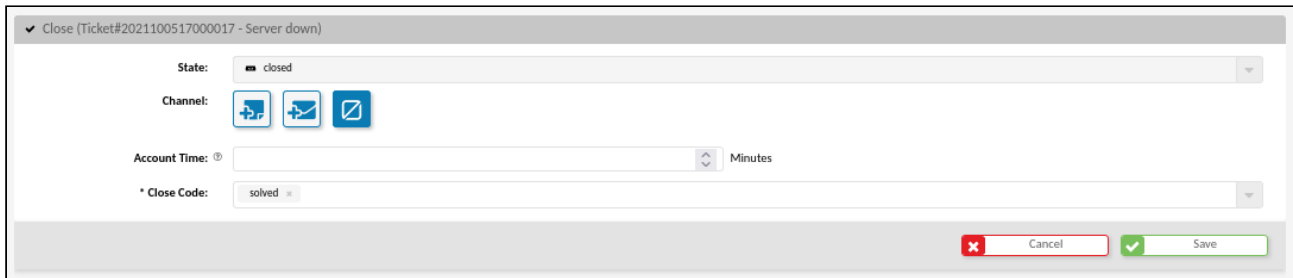


Fig.: Edit Dialog to Close a Ticket

The dialog contains a few input fields to help you close the process.

Input Field	Explanation
State	The ticket state is automatically set to "closed" using this action. If you would like to set a different ticket state, please select the action "Edit" in the ticket zoom view.
Channel	With this action, choose whether you would like to create a note, send an email, or not create an article. If you select channels "Note" or "Email", the input fields "Subject" and "Article Text" are mandatory fields.
Account Time	You can enter your accounted time in minutes.
Close Code	Select a close code from the list. This is subsequently shown in the ticket zoom view. This field is a mandatory field.

To complete the action, finally click "Save".

4.3.3 Article actions within the ticket

Additional actions are also available within the articles in a ticket:

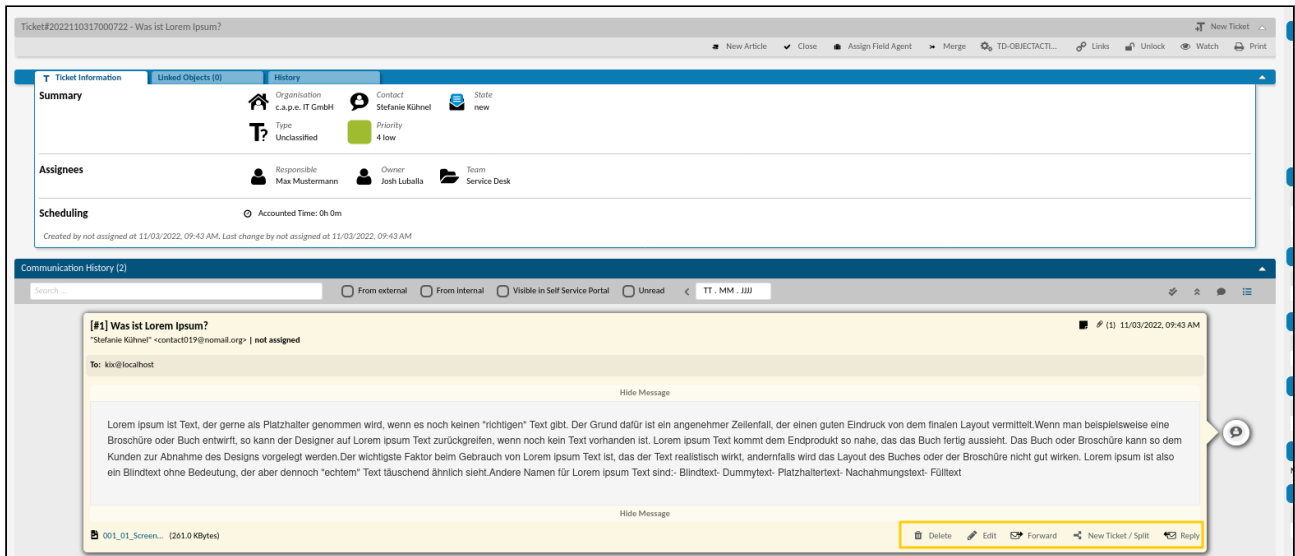


Fig.: Article actions within the ticket

4.3.3.1 Edit Article

This item promotion is shipped inactive with the system and must be activated and configured by your administrator if required. If it is active and the agent has the appropriate permission, the "Edit" button appears in the article.

Clicking the "Edit" button opens a tab with the "Edit Article" dialog.

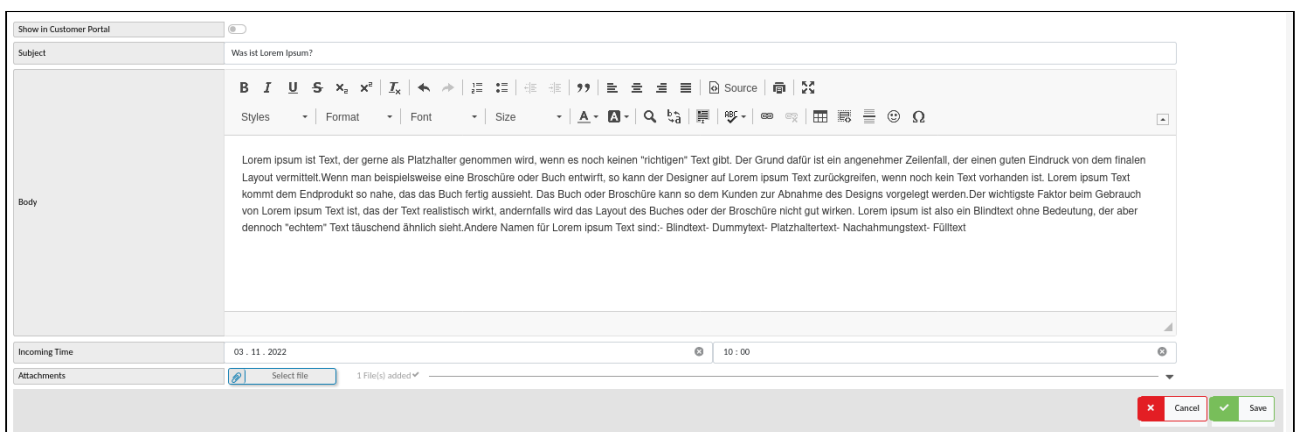


Fig. Example of "Edit Article" dialog

All entries can be edited or changed in this dialog. Finally, save the change.

The article now shows that it has been changed. Hover your mouse over the "edited" info to see who made the change.

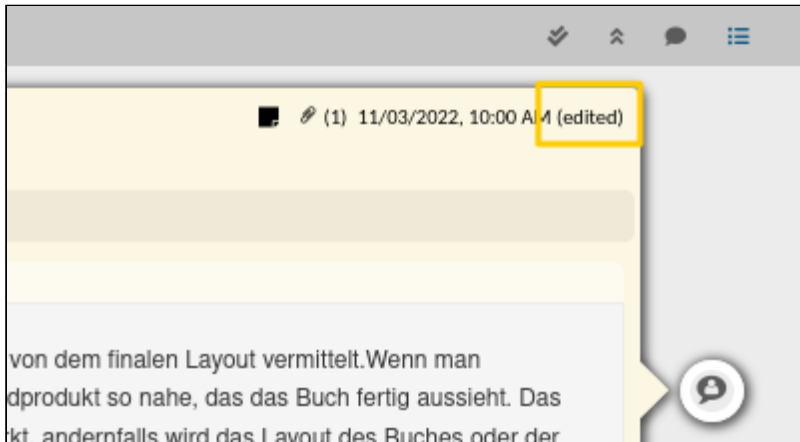


Fig.: Display that an article has been edited

4.3.3.2 Delete Article

This item promotion is shipped inactive with the system and must be activated and configured by your administrator if required. If it is active and the agent has the appropriate permission, the "Delete" button appears in the article.

If you click on the "Delete" button, an overlay opens with the following query: "This action cannot be undone. Are you sure you want to delete this item?" If you confirm the request, the article will be deleted.

4.3.3.3 Split Ticket

The "New Ticket/Split" function exists to create a new ticket from an article in a source ticket or to extract subtasks and assign them to a respective team.

After clicking the button, a ticket dialog of the type child ticket opens. Unless otherwise configured by your admin, the ticket template on which the source ticket is based is used for the child ticket and the article content and attachments are transferred.

i The transfer does not take place if the exit ticket is in the "Pending time" status.

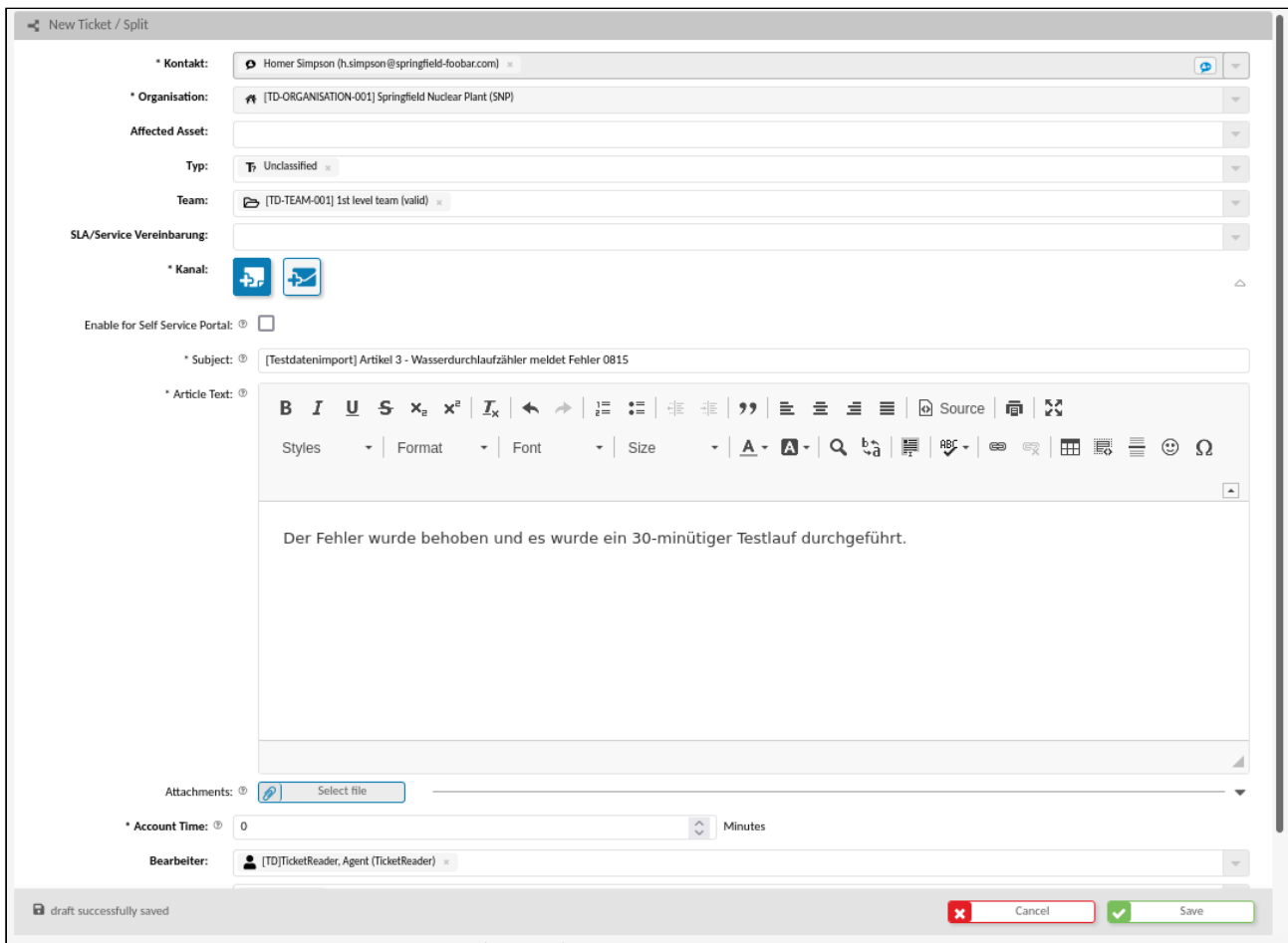


Fig. : Example of the share ticket dialog



Fig. : "Parent ticket" field (last field in the dialog) with pre-filled data

If necessary, you can adjust field contents. Saving the dialog creates a new ticket that is linked to the original ticket.

4.3.4 Canceling Ticket Action

If you perform a dynamic ticket action and then cancel this, configured pre-actions may have already been executed. If you click the "Cancel" button or "x" in the top-right corner of the window, an information window is shown: "Actions have already been executed in the background. " This is purely for informational purposes and requires no further response.



If a dynamic ticket action is canceled for which there are no configured pre-actions, the information window does not appear.

4.3.5 Create FAQ from ticket

The action to create an FAQ entry directly from a ticket is available in the "Edit ticket" and "Close ticket" dialogs.

If you select the channel "Note" and "Email", the dialog offers an additional selection field "Create FAQ Suggestion".

If you set the selection field to "Yes", a new FAQ entry will be created using the ticket data.

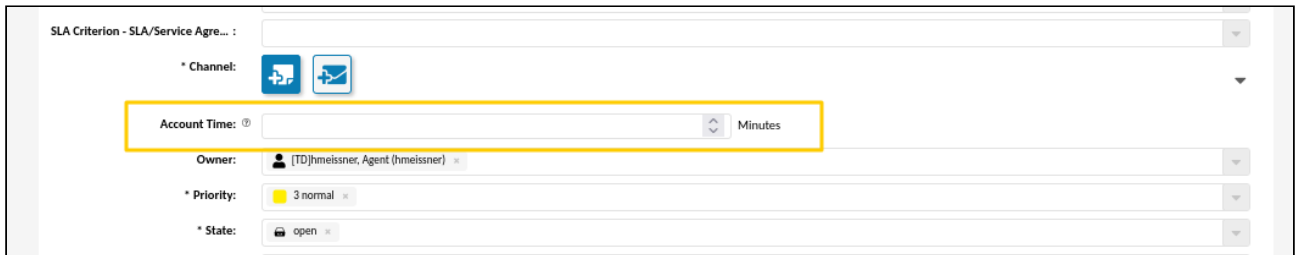
The FAQ category in which the entry is created is stored in the job (admin area). Initially there are among other things the following parameters are specified:

- Title: Subject of the first article
- Category: Misc
- Cause: Content of the first article on the ticket
- Solution: Content of the article that triggered the job
- Dynamic fields: Related tickets (creates the link between ticket and FAQ)

Your admin can adjust the parameters if needed.

4.4 Time Accounting

You have the option of entering the time required to process the ticket directly on the ticket. The times can be recorded manually for ticket creation, processing, and article creation (new article, forwarding, replies). Entering a time requirement is **not** linked to the creation of an article.



The screenshot shows the 'EditTicket' dialog with the following fields:

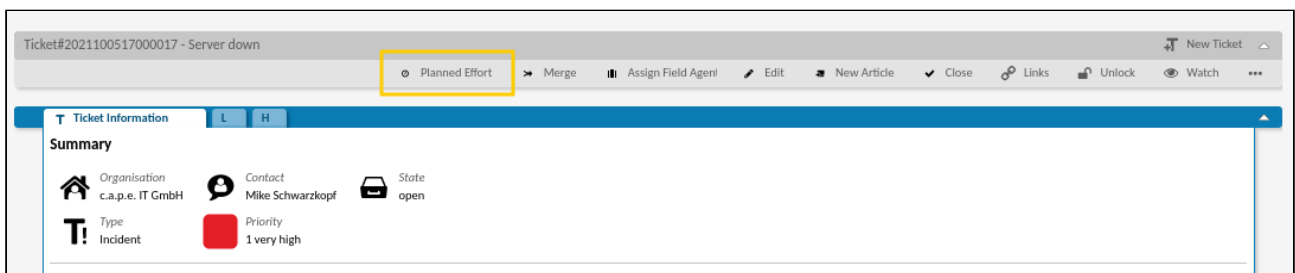
- SLA Criterion - SLA/Service Agree... : [Dropdown]
- * Channel: [Icons]
- Account Time: [Input field with 'Minutes' unit, highlighted in yellow]
- Owner: [Dropdown: (TD)hmeissner, Agent (hmeissner)]
- * Priority: [Dropdown: 3 normal]
- * State: [Dropdown: open]

Fig.: Field for Time Accounting in the "EditTicket" dialog

Basically, the times are saved in minutes. Correction postings are possible by specifying a negative posting (e.g. enter -15). This ensures traceability and the times actually worked on the ticket.

4.4.1 Budgets for Scheduling

As a ticket agent, you have the option of setting a time budget for this ticket.



The screenshot shows the ticket summary page for 'Ticket#2021100517000017 - Server down'. The 'Planned Effort' tab is highlighted in yellow. The summary includes:

- Organisation: c.a.p.e. IT GmbH
- Contact: Mike Schwarzkopf
- State: open
- Type: Incident
- Priority: 1 very high

Fig.: Position of the "Planned Effort" tab

Click the "Planned Effort" tab to enter the planned time required. A new tab opens in which you can enter the value. Click "Save" to complete the process.



Planned Effort (Ticket#2021100517000017 - Server down)

* Planned Effort (min): 30

Cancel Save

If you now edit the ticket, enter the time you spent each time you edit it. In the "Simple Time Accounting" sidebar on the right edge of the screen, you can always see how much of the planned time budget is still available for processing. A positive balance is shown in green. If you have exceeded the planned time budget, the balance appears in red.

4.5 Team View Modes

You can choose between different view modes in the KIX Pro ticket dashboard:

- List
- Kanban
- Calendar
- Map

The corresponding buttons can be found on the ticket dashboard above the statistics widgets.

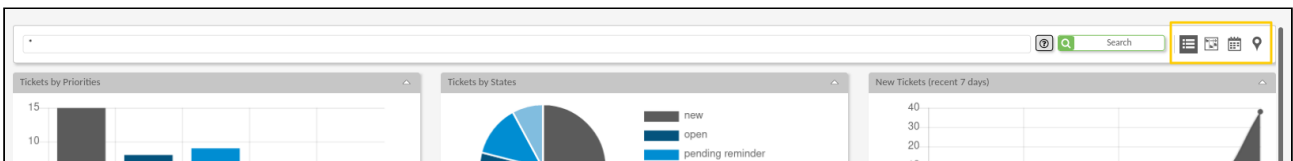


Fig.: The team view modes in the ticket dashboard

4.5.1 List view

The list view is the standard view in the ticket dashboard. You will see all tickets listed in a table.

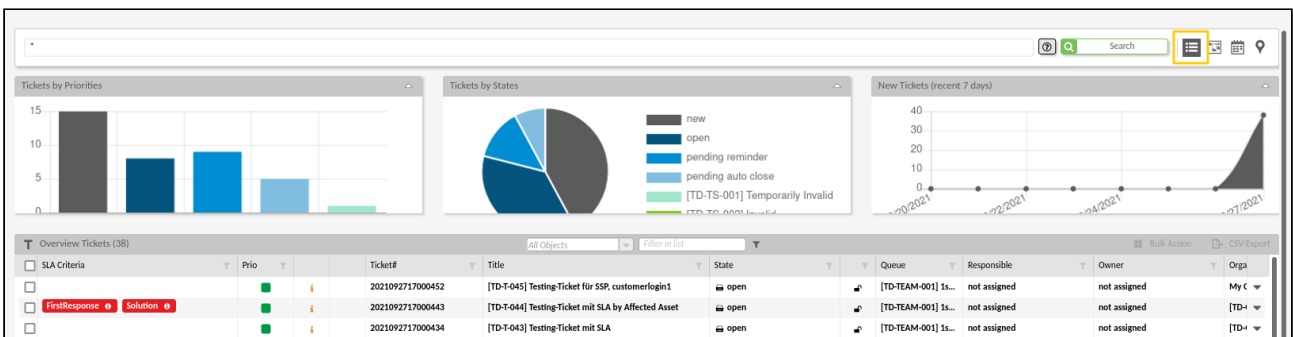


Fig.: List view mode

4.5.2 Kanban view

The Kanban view enables the tickets to be visually separated according to their processing status (analogous to the personal Kanban board in KIX Start). The tickets are displayed as individual cards, which you can drag and drop to another column of the Kanban board. The processing status of the ticket changes automatically.

The cards display various configurable ticket information. Your administrator can determine which ticket information should be displayed in the cards.

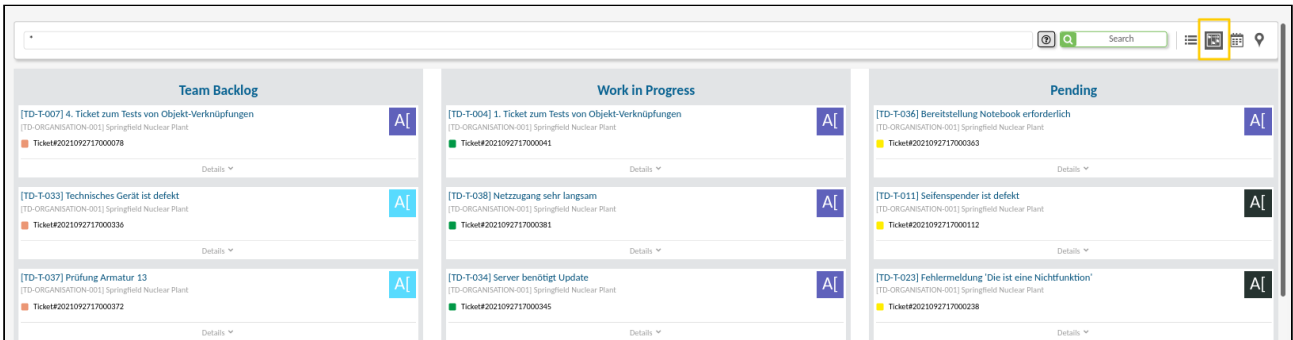


Fig. : Kanban view mode

4.5.3 Calendar view

In the calendar view, the tickets are displayed according to their due date. If you click on a ticket in the calendar, an overlay opens with a map that contains detailed information about the ticket.

For the display of the tickets in the calendar, the dates stored under "Plan start" and "Plan end" are used by default.

The list of agents displayed on the right-hand side of the screen is dynamic and reflects all ticket owners that are displayed in the calendar.

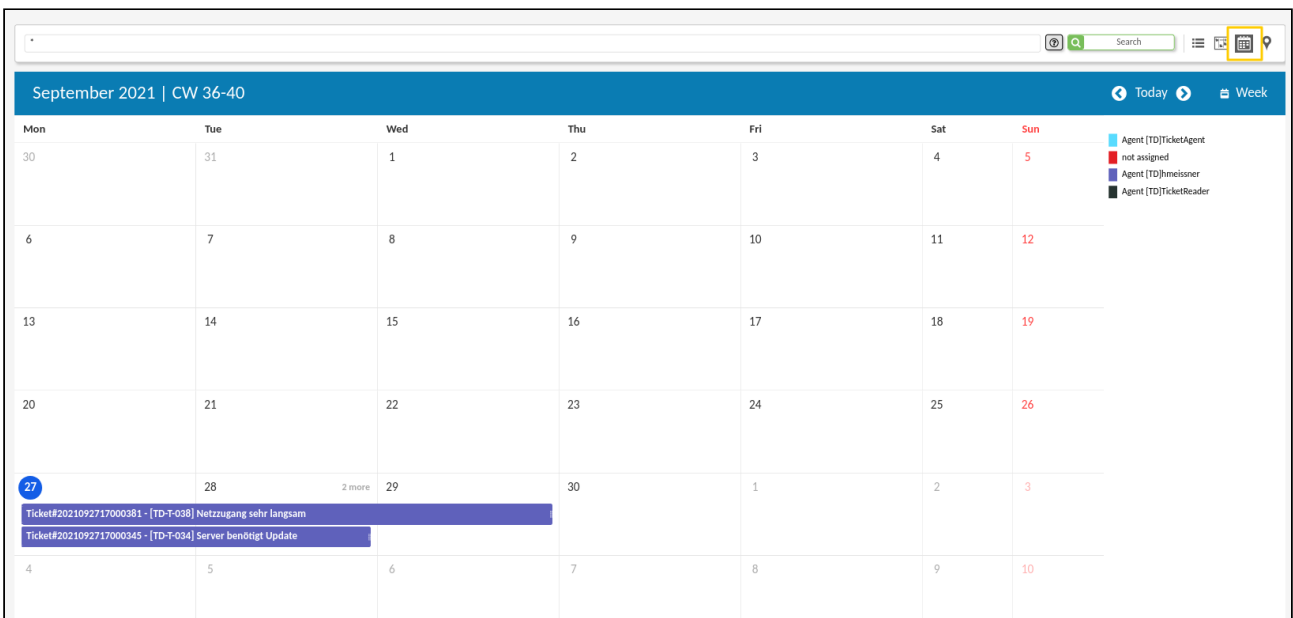


Fig. : Calendar view mode

4.5.4 Map view

The map view enables the locations for tickets to be visualized on a map and thus enables field operations to be planned.

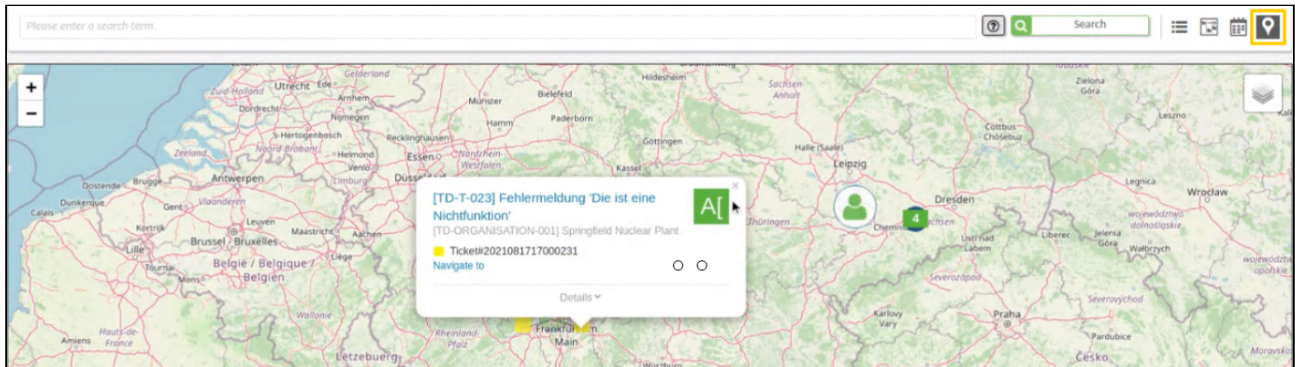


Fig. : Map view mode


The map uses open street maps. The address data stored on a ticket are the basis for the display on the map. To activate the ticket list or to select whose tickets should be displayed, click on the white square in the top right corner of the map.

If a ticket has specified a place of use, it is shown on the map as a location with the ticket title and the name of the owner. If several tickets meet at one location, they are shown as a group with the total number of tickets in the middle. In addition, the individual tickets are shown with the icon that shows the priority.

If you select a special ticket by clicking on it, an info card opens similar to the Kanban or calendar function, which contains the following data:

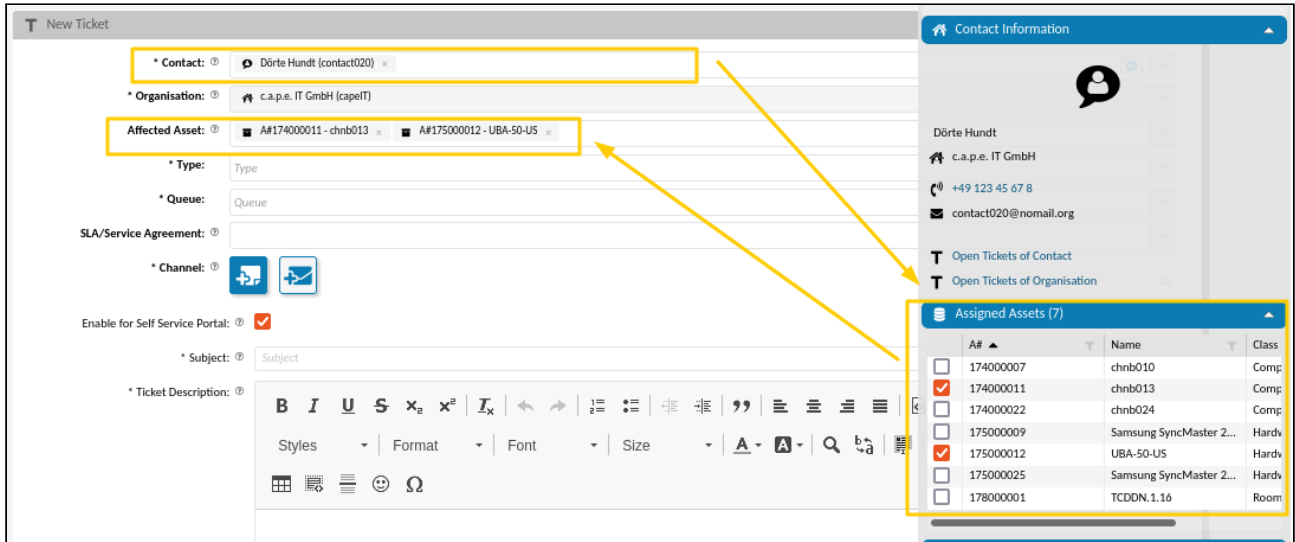
- Ticket title
- Ticket number
- Priority
- the avatar of the owner (if this is created)
- Contact
- State
- Owner

You also have the option of displaying the route to the location. Click on the link "Navigate to" and you will be redirected to a route planner.

 From version r1.3, the Field Agent App, which you use for field service, sends the geo-position of the agents to KIX. Since the map updates when data(s) change(s), you always see the current positions of the agents. In emergencies, you can send out agents who are already in the vicinity of the scene.

4.6 Sidebar "Assigned Assets"

The "Assigned Assets" table widget shows the assets that are assigned to the contact selected on the ticket. By clicking on one of the assigned assets, it is set directly on the ticket in the "Affected Asset" field.



The screenshot displays the 'New Ticket' form with several fields highlighted in yellow. The 'Contact' field is set to 'Dörte Hundt (contact020)'. The 'Organisation' is 'c.a.p.e. IT GmbH (capeIT)'. The 'Affected Asset' field contains two selected assets: 'A#174000011 - chnb013' and 'A#175000012 - UBA-50-US'. The 'Assigned Assets (7)' sidebar is open, showing a table of assets with checkboxes. The 'Affected Asset' field is linked to this table, as indicated by yellow arrows.

A#	Name	Class	
<input type="checkbox"/>	174000007	chnb010	Comp.
<input checked="" type="checkbox"/>	174000011	chnb013	Comp.
<input type="checkbox"/>	174000022	chnb024	Comp.
<input type="checkbox"/>	175000009	Samsung SyncMaster 2...	Hardv.
<input checked="" type="checkbox"/>	175000012	UBA-50-US	Hardv.
<input type="checkbox"/>	175000025	Samsung SyncMaster 2...	Hardv.
<input type="checkbox"/>	178000001	TCDDN.1.16	Room

5 Assets - Enhanced Functions

5.1 The link graph: Representation with Impact Simulation

In KIX Pro you can use the graphical representation of the asset network to carry out a failure simulation. The simulation shows you which assets are affected if another asset fails. It thus shows the effects of a device / service failure on linked assets / services. In this way, you can classify the relevance of an asset and identify possible weak points.

In the detail view of an asset, click on "Show graph". The graph will open in a new tab. You can zoom in and out on the image in order (especially in the case of very complex displays) to see and edit elements that are outside the visible area. The entire viewing area of the graph with all its elements can also be moved.

In addition to the graph options, the "Impact Simulation" widget lists the assets contained in the graph. You can use the selection fields to specify the status for each asset (operational or malfunction). Based on your selection, the color display in the graph is changed and the assets affected by the malfunction are identified. Direct dependencies are shown in red. Indirect dependencies are shown in orange.

Example

If an incident is set and this asset has a "depends on" link to another asset, then the target asset is:

- red (incident) if only this one link is available
- orange (warning) if there is still a dependency on another asset and this in turn is in "Operational" or "Warning".
- if an asset has received the incident status "Warning" (manual setting is not possible), then its other linked assets are also orange (warning)

Note: The basics of the link graph can be found in the KIX Start user manual.

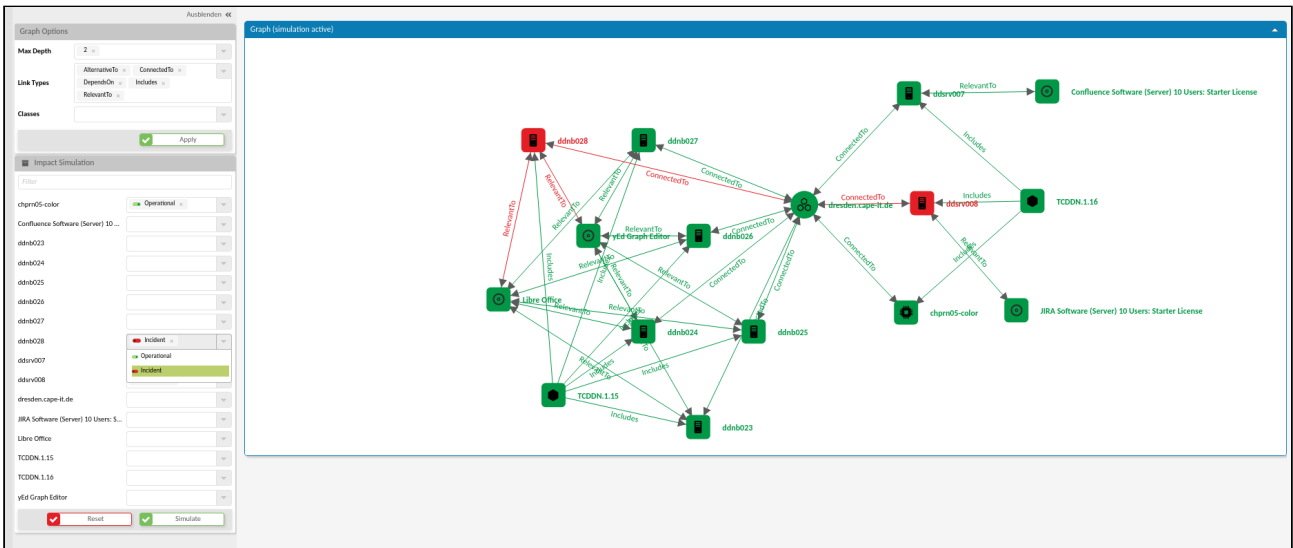


Fig.: Link graph with incident of an asset

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

To close the graph, close the tab.

6 Locations

The "Locations" module provides you with a location-based view of the device inventory. This can be used, for example, as a basis for inventories, location-based task allocations or responsibilities. The question "Which devices are located at location 1 in building F in room E16.1?" can therefore be answered at a glance.

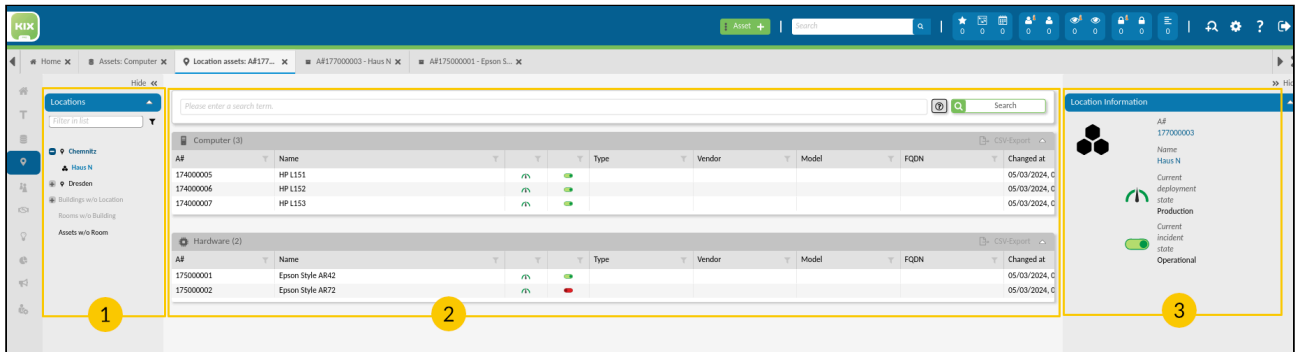


Fig.: List of assets at the Chemnitz site - House N - Room E_16.1 (example)

This is based on the hierarchy "Location → Building → Room", which is shown in the Explorer on the left-hand side **1**. KIX takes into account the direct assignment of an asset to a location (asset classes: Location | Building | Room). This assignment is made when creating/editing an asset.

The tables list the assets that are assigned to the location selected in the Explorer **2**. There is one table per asset class. This allows you to see exactly which assets exist at the selected location.

There is also a sidebar on the right-hand side of the screen in which further information on the selected location is displayed **3**.

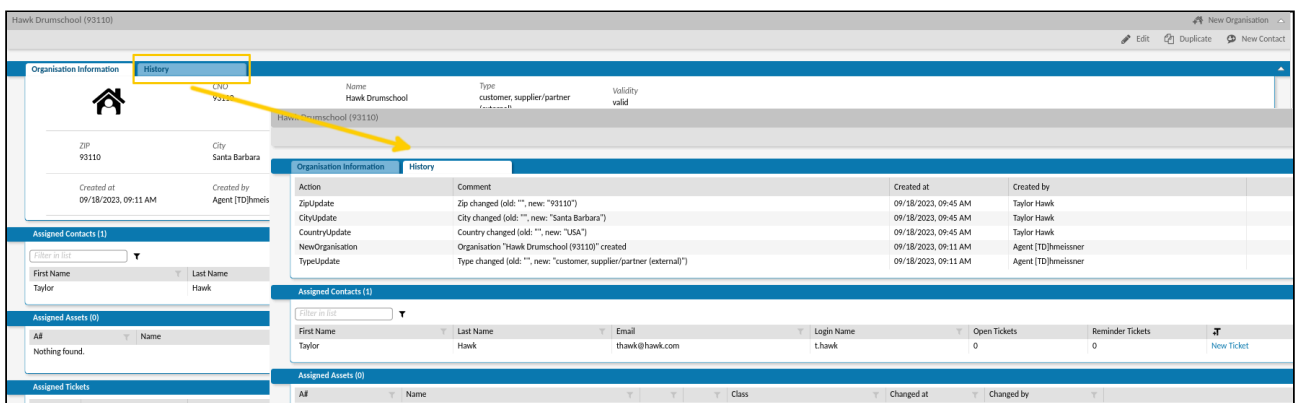
i Only assets that are assigned to a location are displayed in the "Locations" module. Not all asset classes have the option of specifying a location by default (e.g. asset class "Network"). If these asset classes are also to be displayed in the "Locations" module, the "Location" input field must be integrated into the corresponding asset class by your admin.

7 Organisation - Enhanced Functions

Analogous to the tab "History" on tickets, this information also exists in KIX Pro for organisations and contacts. By clicking on the "History" tab, you can see which steps or processes have taken place when and by whom.

7.1 Zoom view organisation

By clicking on the desired organisation entry, the overview opens, showing all stored information on this organisation. In KIX Pro, the tab "History" is added.



The screenshot shows the KIX Pro interface for an organisation. The 'History' tab is selected, displaying a table of actions performed on the organisation. The 'Organisation Information' tab is also visible, showing details for 'Hawk Drumschool (93110)'. The 'History' table includes columns for Action, Comment, Created at, and Created by.

Action	Comment	Created at	Created by
ZipUpdate	Zip changed (old: "", new: "93110")	09/18/2023, 09:45 AM	Taylor Hawk
CityUpdate	City changed (old: "", new: "Santa Barbara")	09/18/2023, 09:45 AM	Taylor Hawk
CountryUpdate	Country changed (old: "", new: "USA")	09/18/2023, 09:45 AM	Taylor Hawk
NewOrganisation	Organisation "Hawk Drumschool (93110)" created	09/18/2023, 09:11 AM	Agent [TD]hmeissner
TypeUpdate	Type changed (old: "", new: "customer, supplier/partner (external)")	09/18/2023, 09:11 AM	Agent [TD]hmeissner

Fig.: Example of "History" of an organisation

7.2 Zoom view contact

By clicking on the desired contact, the overview of all information stored for this contact opens. In KIX Pro, the tab "History" is added.



The screenshot shows the 'History' tab of a contact record for Daniel Carey (d.carey). The contact information includes: First Name: Daniel, Last Name: Carey, Login Name: d.carey, Email: d.carey@hawk.com, ZIP: 93109, City: Santa Barbara, and Organization: Hawk Drumschool. The history table lists several actions:

Action	Comment	Created at	Created by
ZipUpdate	Zip changed (old: "", new: "93109")	09/18/2023, 11:27 AM	Oliver Kalken
CityUpdate	City changed (old: "", new: "Santa Barbara")	09/18/2023, 11:27 AM	Oliver Kalken
CountryUpdate	Country changed (old: "", new: "USA")	09/18/2023, 11:27 AM	Oliver Kalken
AssignedUserIDUpdate	AssignedUser changed (old: "", new: "d.carey")	09/18/2023, 11:18 AM	Taylor Hawk
NewContact	Contact "Daniel Carey (d.carey@hawk.com)" created	09/18/2023, 11:18 AM	Taylor Hawk

Below the history table, there are sections for Assigned Organisations (1), Assigned Assets (0), and Assigned Tickets, each with a table header and no data rows.

Fig.: Example for "History" of a contact

8 Service Catalog Management

With service contracts, you can develop a service catalog that contains concrete information about all the services in operation and planned. These contracts are managed in the Service Contracts module.

Service contracts establish the link between services and SLAs and define the conditions under which these links are available on the ticket. Put simply, this means: Service + SLAs + [optional conditions] = service contract.

Proceed as follows to create the service catalogue:

Step 1: Create services.

- Services are all assets that are created in the "Service" class. This can be, for example, all the services that your company offers.

Step 2: SLAs are created and managed by your admin. These are available to you in the further process.

- SLAs (Service Level Agreements) each consist of a response time and a solution time. These times set the timeframe for resolving an issue.

Step 3: Create a service contract.

- Link a service to one or more SLAs.
- Optionally, you can set conditions such as B. organizations, contacts, priorities or ticket types - both individually and in combination with each other. These conditions work like filters and restrict the selection of possible services and SLAs on the ticket.
- If, for example, an organization and a ticket type are selected in the conditions of the service contract, the service and SLA stored in the service contract are only available on the ticket if the combination of organization and ticket type applies.

Step 4: Apply the service contract in a ticket.

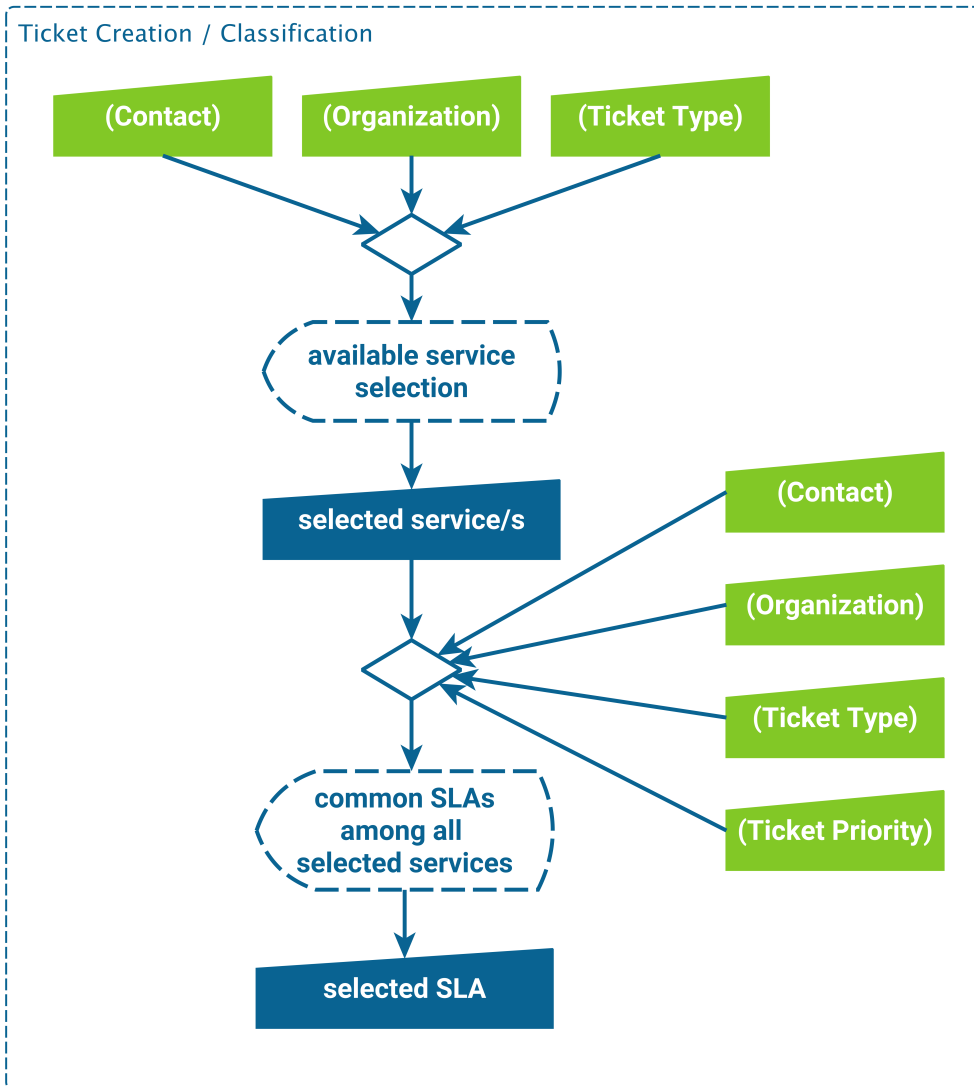


Fig.: Ticket creation scheme with services and SLAs

8.1 Services

In order for service contracts to be created, the individual services must first be created. Only then can the services be assigned to service levels.

To create a service, create an asset of the "Service" class. All assets created under the "Service" asset class are listed in the Service Contracts module. The hierarchy of the assets is taken into account.

If you have selected a "Service" in the explorer and clicked on the "New Service Contract" button, the field "Service" is preselected accordingly in the form that opens.

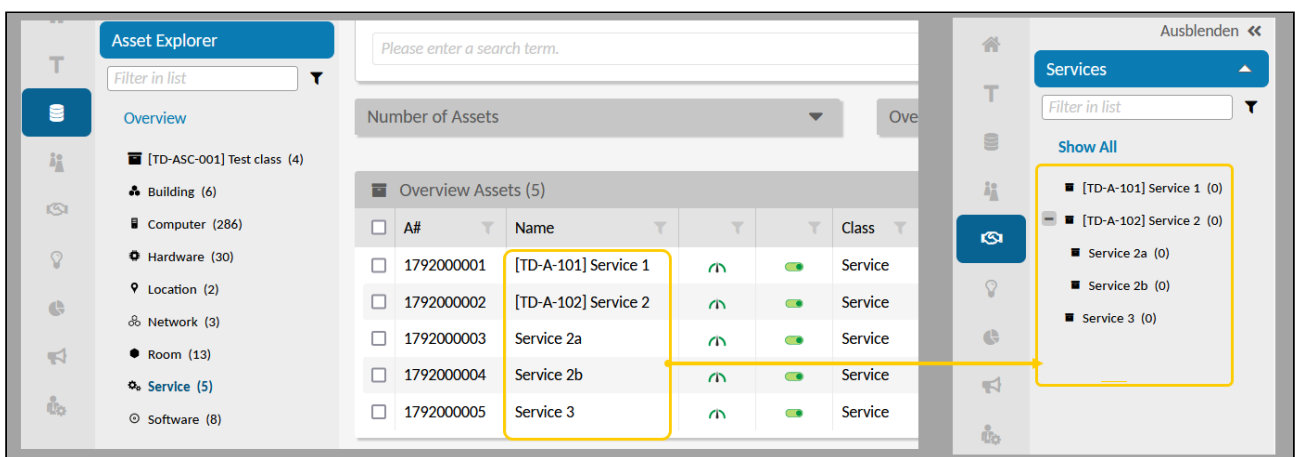


Fig.: Assets of the "Service" class in the Services tree of the Service Contracts module

How to create an asset of the "Service" class:

1. Click the green plus button and select Asset.
2. In Asset Explorer, click "Service".



3. Fill out the input mask (see table) and save the new asset.
4. The asset is now included in both the assets of the "Service" class and in the service contracts.



Field	Description
Name	Enter a unique name for the asset.
Deployment State	By entering the usage status, you describe the position of the asset within its life cycle.
Incident State	Select the current state of the asset.
General Information	
Parent Service	Optional: If required, assign a parent service to the service. You can use it to create a tree hierarchy of services.
Type	Optional: If required, assign a type to the service.
Criticality	The criticality defines the relevance of the service. It is an incident classification tool. Currently you can choose from 4 predefined options: <ul style="list-style-type: none">• existential• business critical• support process• none/minor If necessary, your administrator can store further criticalities in the General Catalog.
Specification	Optional: If required, enter a description of the specification(s) of this service.
Specification Attachment	Optional: If necessary, add one or more attachments to the description of the specification(s) of this service.
Service Owner	Optional: If required, assign a responsible agent to the service.
Dependencies	
Required Service	Optional: You create a dependency here by selecting a required service.
Required Asset	Optional: You create a dependency here by selecting a required asset.



Field	Description
Service Catalog	
Assigned SLA	Optional: Associate SLA(s) with the service if required.

8.2 Service Level Agreements (SLAs)

Using KIX Pro, you can set Service Level Agreements (SLAs) for tickets. An SLA contains different service time requirements. These consist of two parts:

1. The *First Response* specifies how long a service desk has to react to a new ticket.
2. The *Solution* of a ticket specifies how long a service desk has to complete a ticket.

Content on this page:

- [SLA for Ticket](#) (see page 41)
- [SLAs in Ticket Lists](#) (see page 42)
- [SLA in Ticket Zoom View](#) (see page 43)
- [SLA in Ticket Search](#) (see page 46)
- [SLA for Assets](#) (see page 47)

Info

- In the standard installation, "First Response" means creating an article visible in the customer portal. Depending on how the system is set up, other actions can also mean a "First Response".
- In the standard installation, "Solution" means closing the ticket for the first time. Depending on how the system is set up, other actions can also mean a "Solution".

First Response and Solution are designated SLA criteria. Both criteria have attributes, for example, a start time, duration, a reminder time, and a target time.

If the SLA is selected on the ticket, these target requirements are saved on the ticket for both SLA criteria. You can see an overview of these SLA criteria and achievement in ticket lists and the ticket zoom view. If one of the time requirements in the SLA attributes is exceeded, this is deemed an escalation. To avoid this, tickets are highlighted applicably in KIX. Users concerned first of all receive a notification if tickets are about to be escalated, and another notification if tickets have already been escalated.

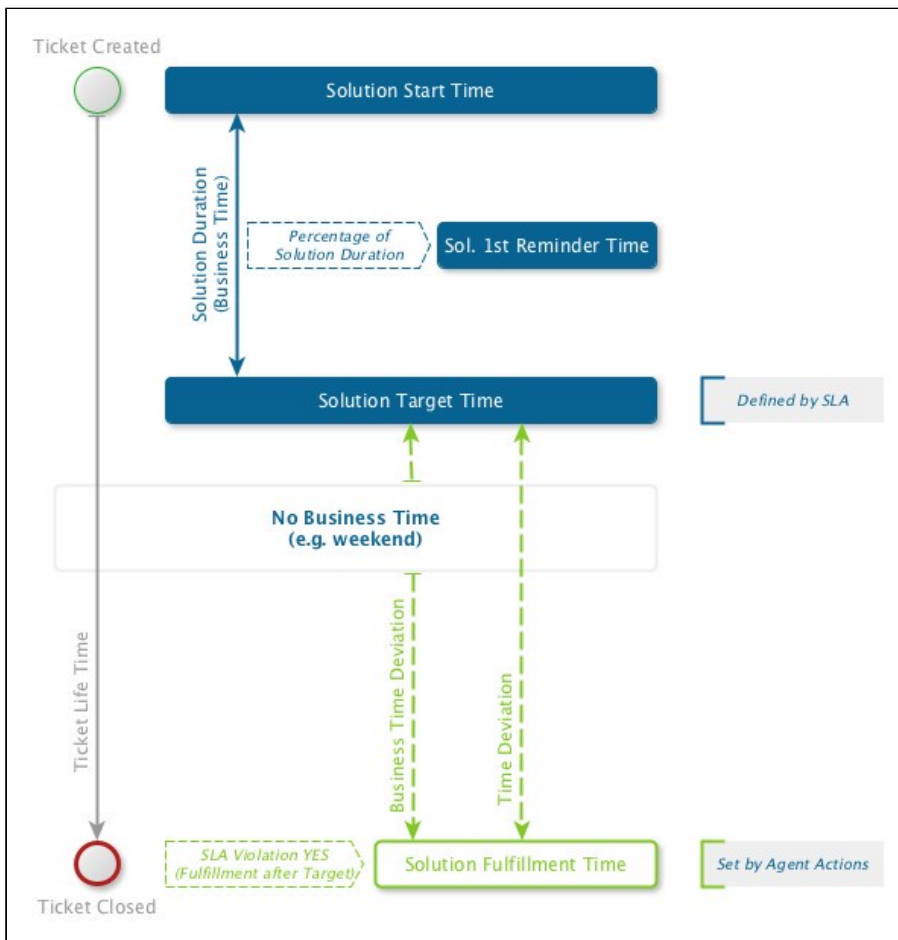


Fig.: Visualization of SLA Attributes for Solution Time Criterion

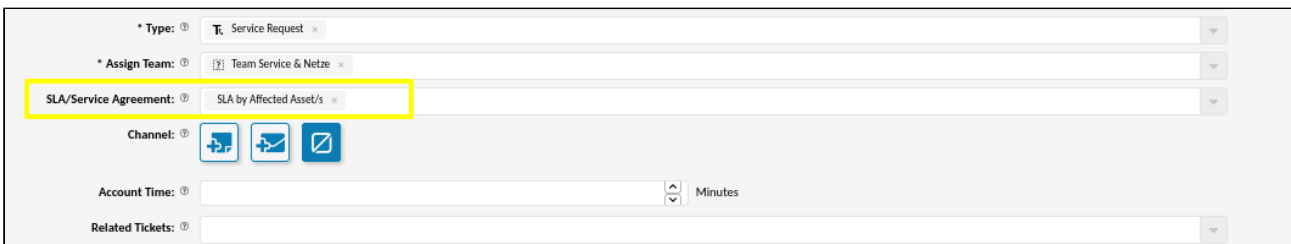
i Initially, in KIX the uniform holidays valid in the Federal Republic of Germany and in Austria as well as Christmas Eve and New Year's Eve are delivered. Movable holidays, such as Easter and Whitsun, are calculated by the system independently. These days will count as "No Business Time" and no escalation will occur.

8.2.1 SLA for Ticket

In the "New Ticket" dialog, there is another input field "SLA/Service Agreement". This field is displayed below "Assign Team" by default. All of the available SLAs can be selected from a drop-down. Precisely one SLA can be saved for a ticket.



- If a ticket is to be created without an SLA, the default SLA "No escalation" can be set.
- If you select the SLA "SLA by Affected Service and Prio", the target criteria of all permissible SLAs based on services, organization, contact, type and priority are determined and the shortest target time is stored on the ticket.
- If you select the SLA "SLA by affected asset/s", the target criteria will be determined based on all "Affected assets" selected on the ticket and the resulting shortest target time will be stored on the ticket.




The screenshot shows a form with the following fields:


- * Type: Service Request
- * Assign Team: Team Service & Netze
- SLA/Service Agreement: SLA by Affected Asset/s (highlighted in yellow)
- Channel: Three icons representing different channels.
- Account Time: A text input field followed by a dropdown arrow and the word "Minutes".
- Related Tickets: A text input field.

Fig.: "SLA/Service Agreement" Form Field in Ticket Editing Dialog

8.2.2 SLAs in Ticket Lists

In ticket lists, the "SLA Criteria" column displays the state of service time requirements for this ticket:

Color	Meaning
empty	No SLA is set.
blue	No SLA criterion is violated, warned or paused.
grey	<p>All SLA criteria are paused.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> The reaction or solution time for the ticket can pause if you e.g. wait for the feedback from the customer. Pausing is linked to the status of a ticket. Your admin determines which status triggers the pause when creating the SLA.</p> <p>If a ticket is in the pause state for an SLA criterion, no target time is displayed for it. Instead, it says "suspended" in the overview or in the info overlay.</p> <p>If the ticket leaves this status, the time for the corresponding criterion continues to run. The system automatically calculates a new target time.</p> </div>
green	All SLA criteria are fulfilled.
orange	Reached the reminder time for an SLA criterion (either reaction or resolution).
red	An SLA criterion is violated/escalated.

The name of the affected SLA criterion and an icon are shown. Clicking the  icon opens an information overlay that shows the attributes for the SLA criterion. (see table below for an explanation of the individual SLA criteria)

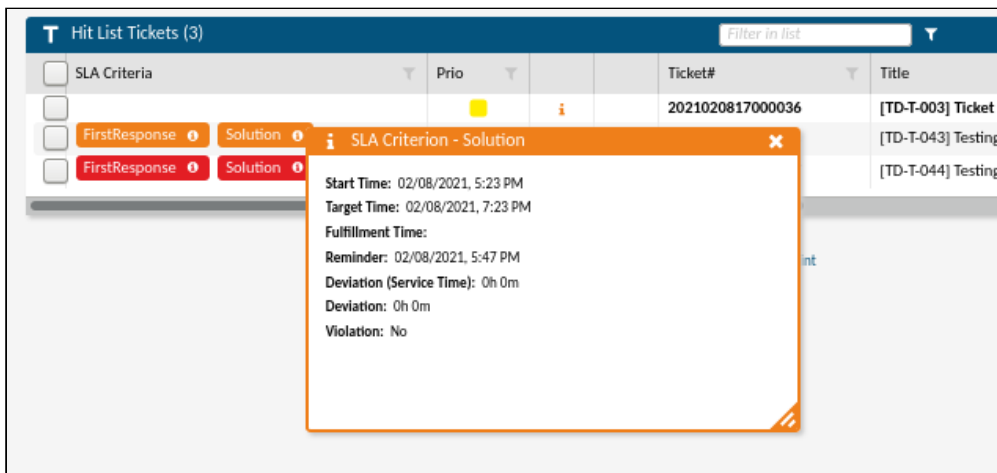


Fig.: Ticket with Violated SLA Criteria

i If your admin has enabled the personalisation of the dashboard, it is also possible to display the name of the SLA.

1. Click on "Customize Dashboard" in the ticket dashboard.
2. Scroll down to the desired table and then to the table column settings.
3. Select the "SLA/Service Agreement" column from the selection menu on the right and click on the "Add column(s)" button.
4. If required: Use drag & drop (see glossary for explanation) to move the added column to the desired position within the table.
5. Finally, press the "Save" button.

8.2.3 SLA in Ticket Zoom View

In the ticket zoom view, the "Service-Level-Agreement (SLA)" lane shows details on the service time requirements for the SLA set on the ticket:

- If no SLA is set on the ticket, the lane is not displayed.
- If an SLA is set on the ticket and no criterion is violated, warns or pauses, the lane is blue.
- If an SLA is set on the ticket, no criteria are violated and all SLA criteria are paused, the lane is grey.
- If an SLA is set on the ticket and all SLA criteria are met, the lane is green.
- If an SLA is set on the ticket and the reminder time for a criterion has been reached, the lane is orange.
- If an SLA is set on the ticket and a criterion is violated, the lane is red.

The lane is displayed in the color of the "most critical" SLA criterion.

- That is, if the reaction time is orange, but the solution time is red, the lane appears in red.
- The same applies to a paused criterion. If a critical value is reached during the pause, the lane changes to this color.

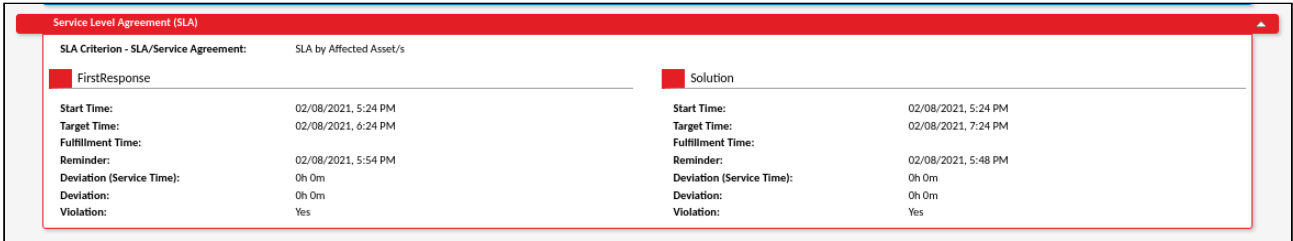


Fig.: "Service-Level-Agreement (SLA)" Lane in Ticket Zoom View

The following SLA criteria are shown:

SLA Criterion	Explanation
SLA/Service Agreement	Name of SLA
First Response	
Start time	Starting time of the First Response Time. Corresponds to the point in time when the ticket was created.
Target time	Target time of the First Response Time: There must be a response by this point in time. i.e. an agent must create an article on the ticket that is visible for the customer.
Fulfillment time	Point at which the First Response was actually performed, meaning the agent created an article that is visible for the customer.
Reminder	Reminder time for the First Response Time: At this point in time KIX sends a reminder message to all agents who have permission to edit the ticket, informing them that the First Response Time is about to be escalated.
Deviation service time	Absolute time difference between target time and fulfillment time (also includes "overnight" or "weekend"). For "service time" the term "business time" is also common.

SLA Criterion	Explanation
Deviation	Time difference between the target time and fulfillment time in business minutes (without "night").
Violation	"Yes" or "No"; shows at a glance whether the obligation defined in the SLA has been fulfilled.
Solution	
Start time	Starting time of the First Response Time. Corresponds to the point in time when the ticket was created.
Target time	Target time of Solution Time: The ticket must be resolved by this point in time, i.e. it must have achieved the state "closed".
Fulfillment time	Time at which the ticket was actually resolved, i.e. the state "closed" was saved for the ticket.
Reminder	Reminder time for the Solution Time: At this point in time, KIX sends a reminder message to all agents who have permission to edit the ticket, informing them that the Solution Time is about to be escalated for this ticket.
Deviation service time	Absolute time difference between target time and fulfillment time (also includes "overnight" or "weekend"). For "service time" the term "business time" is also common.
Deviation	Time difference between the target time and fulfillment time in business minutes (without "night").
Violation	"Yes" or "No"; shows at a glance whether the obligation defined in the SLA has been fulfilled.

8.2.4 SLA in Ticket Search

All attributes of the SLA criteria that are shown in the ticket zoom view can also be used as search attributes in the ticket advanced search. Combine the attributes to improve the search results.

Application example

You would like to find all tickets for the customer "Example Corp" for which the First Response Time will be reached by the end of the current calendar week.

Here, select the following in the ticket advanced search:

Search attribute	Operator	Entry
Customer	contained in	Example Corp
SLA criterion	contained in	First Response
SLA criterion- target time	before	<desired date>

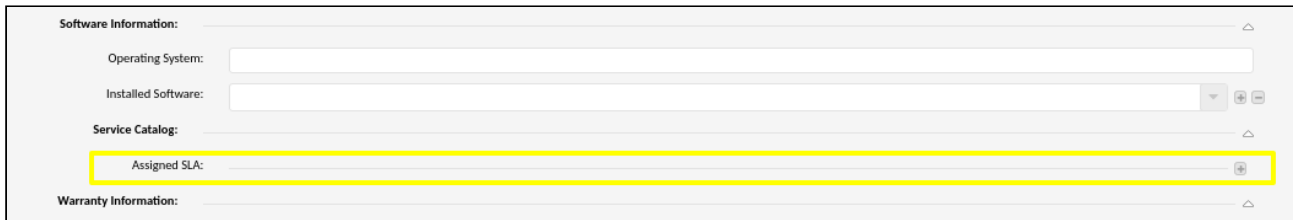
You would like to find all the tickets for which at least one of the target times for the First Response and Solution has been exceeded.

Search attribute	Operator	Entry
SLA criterion	contained in	First Response; Solution
SLA criterion - violation	contained in	Yes

8.2.5 SLA for Assets

When creating and/or editing an asset, precisely one SLA can be assigned to this asset.

Here click "+" on "Assigned SLA" form field and select an SLA from the drop-down.



The screenshot shows a form with several sections: "Software Information", "Operating System", "Installed Software", "Service Catalog", "Assigned SLA", and "Warranty Information". The "Assigned SLA" field is highlighted with a yellow border and contains a plus sign icon, indicating it is a dropdown menu.

Fig.: "Assigned SLA" Form Field for Assets

To set a ticket SLA depending on one or more assets, proceed as follows:

1. Step: SLAs must be set for assets.
2. Step: Open "New Ticket" dialog.
3. Step: In "Affected Asset" form field, select the applicable assets.
4. Step: In "SLA/Service Agreement" form field, select the SLA "SLA by Affected Asset/s".
5. Step: Complete the ticket form and save the ticket.

Info

If you have selected several assets in the "Affected Asset" form field, the strictest criteria are selected from all service time requirements provided by the SLA attributes of the assets, and saved on the ticket. It is therefore possible that the First Response Time of an asset and the Solution Time of another asset become valid on the ticket. This ensures that all SLAs can be met.

8.3 Service Contracts - Create and Edit

A service contract defines which service and which SLAs (Service Level Agreements) are available under which conditions on the ticket.

The service contracts are managed in the "Service Contracts" module. In the explorer on the left you will find an overview of all selectable services. The dashboard in the middle lists all service contracts that have already been created.

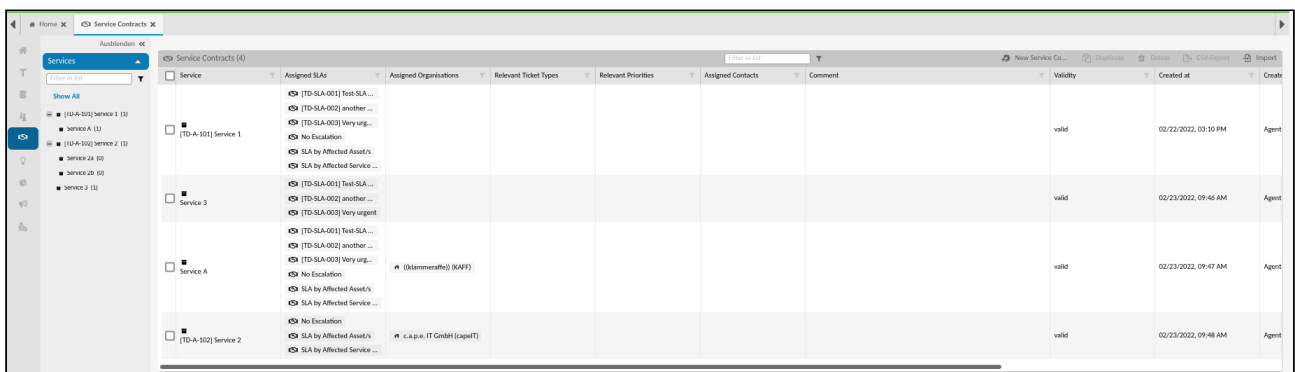



Fig.: Service Catalog Management module view

The following functions are available in this overview:

Function	Description
Filter	Here you have the option of searching the table for a search term. To do this, enter the term and click on the filter symbol.
New Service Contract	Clicking on the button opens the form for creating a new service contract.
Duplicate	The action becomes active as soon as at least one service in the table has been selected or ticked. Clicking the button opens a form filled with the data of the selected service for creating a new service contract.

Function	Description
Delete	<p>The action becomes active as soon as at least one service in the table has been selected or ticked.</p> <p>Click the button to delete the selected service. Several services can also be deleted at the same time.</p>
CSV Export	<p>Exports the selected service contracts to a CSV file in UTF-8 format with a semicolon as a column separator.</p> <p>The action becomes active as soon as at least one report definition in the table has been selected or checked.</p> <p>The export can be used, for example, to</p> <ul style="list-style-type: none"> • to get the required data structure for the import • to transfer service contracts from a KIX test system to a productive KIX • to maintain service contracts externally (e.g. mass data maintenance) • etc. <p>General notes for the CSV export can also be found under: "General function explanations".</p>
Import	<p>After clicking the button, a CSV import of service contracts can be carried out, which imports all assignments. For example, for mass data maintenance or to transfer service contracts from a KIX test environment to a productive KIX.</p> <p>The import is carried out by uploading a CSV file in UTF8 coding with a semicolon as a column separator. The CSV file must correspond to a predefined structure, which can be taken from a previously performed CSV export of service contracts. Please also note the information at the end of this chapter.</p> <p>Incorrect and invalid files are rejected with a note. Therefore, before importing, make sure that the CSV meets the requirements.</p> <p>General notes for the CSV export can also be found under: "General function explanations" .</p>
 (Filter in every column)	<p>If a column contains the filter symbol, it can be searched for a search term. To do this, click on the filter symbol and enter the term you are looking for.</p>

8.3.1 Create a service contract

Click on the "New service contract" button. The corresponding form opens in a new tab:

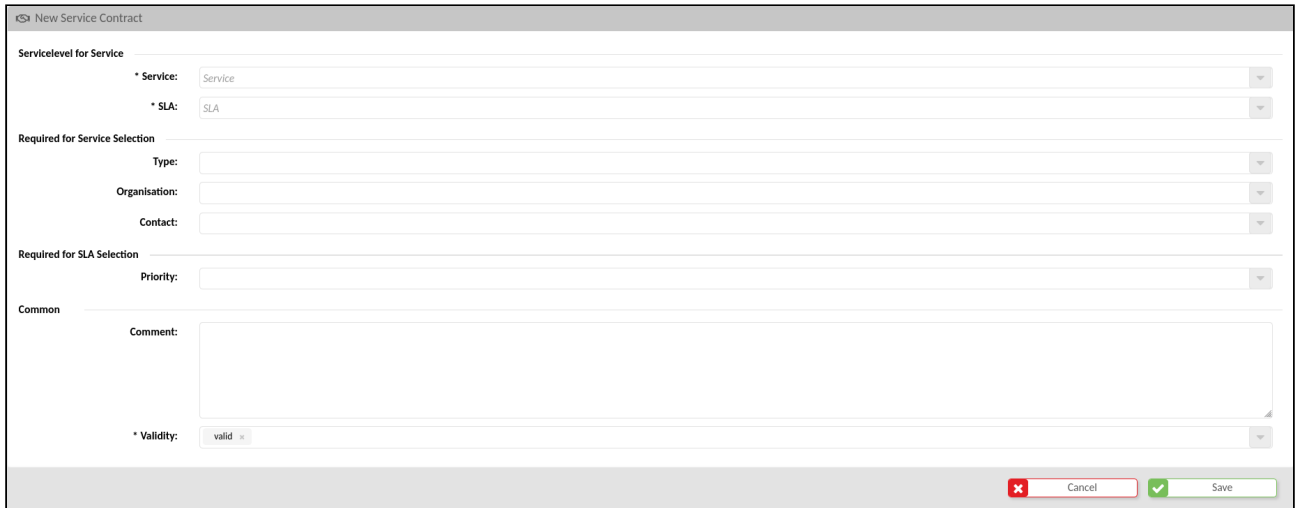


Fig. "New service contract" form

Section	Field	Description
Servicelevel for Service	Service	Select the service to which the service contract should relate.
	SLA	Select which Service Level Agreements (SLAs) are available for the above service. (see "Service Level Agreements (SLA) - What and where?")
Required for Service Selection (You can make optional restrictions at this point.)	Type	Your selection defines the ticket type for which the specified service is available for the stored organization or the stored contact.
	Organisation	If the service with the specified SLAs should only be assigned to contacts from certain organizations, specify these organizations here.
	Contact	If the service with the specified SLAs is only to be assigned to certain contacts, you can enter these contacts here.

Section	Field	Description
Required for SLA Selection	Priority	If the SLA for the named service should only be available for certain priorities, you can enter these priorities here.
Common	Comment	Additional useful information can be recorded in this field.
	Validity	Here you specify whether the service contract is "valid", "invalid" or "temporarily invalid". The service contract can only be used in the system if it is set to "valid".

8.3.2 Inactive Service Contracts

All services are available in the explorer and in the overview of the service contracts, regardless of their status. Inactive/invalid services are grayed out. The number of these service contracts is still given in parentheses after the name.

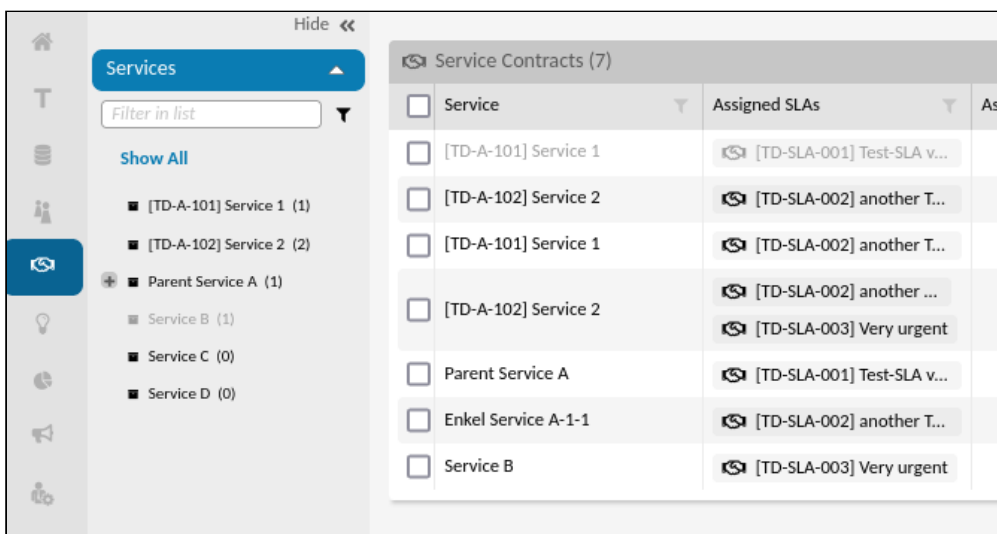


Fig.: Excerpt from Explorer (service tree) and overview of service contracts with active and inactive services

Inactive services can also be displayed in the ticket dialog if they have an active sub-service (child service). This connection is illustrated by the greyed-out display.

The service is visible if

- a subordinate service (sub-service, child-service) is active and valid
- it is valid itself (the "Service" asset must not have a post-production status)

8.3.3 Notes on the import/export of service contracts

The export contains the following attributes (columns), which are also relevant for the import:

Attribute (Column)	Description	Example and Notes	Import possible
ServiceID	The ID/name of the service. Sub-service assets are appended by double colons.	Service1::Service1a	x
SLA	List of SLA designations assigned to the service. Multiple SLAs are separated by commas (without spaces)	No Escalation,SLA by Affected Service,SLA by Affected Service and Prio	x
Organisation (number)	Name of the organisation	My_ORGA	x
Type	Name of the ticket type	Incident	x
Priority	Name of the priority	2 high	x
Contact	Email address of the assigned contact	john.doe@example.org	x
Comment	Content of the comment (if available)		x
Validity	Validity	valid invalid temporarily invalid	x
CreateBy	Contact ID of the creator	65	x
ChangeBy	Contact ID of the changing user	65	



Attribute (Column)	Description	Exampless and Notes	Import possible
CreateTime ChangeTime	Creation or modification date in the format: <code>yyyy.mm.dd hh:mm:ss</code>	"2022-02-23 17:38:59"	
ID (last column)	ID of the service contract Corresponds to the order in the overview of service contracts.	This ID can be used to update an existing service contract during the import. If no ID is given during the import, the service contract will be added to KIX.	x

! For the import, the exact column labels named here must be used so that the system can make an assignment.



9 Reporting - Enhanced Functions

KIX Pro offers you additional output formats for your reports.

In addition to the CSV format, you can also use:

- Excel
- HTML
- JSON
- PDF
- XML

9.1 Overview of preconfigured report definitions

In KIX Pro, additional report definitions are delivered as standard. If necessary, your admin can reconfigure this and use it as a guide for creating your own report definitions.

Asset tickets closed in date range	List of tickets with assigned assets that were closed in a certain period of time. The report creator can select time period, asset classes, organizations and ticket types.
Asset tickets Created In Date Range	List of tickets with assigned assets that were created in a certain period of time. The report creator can select the time period, asset classes, organizations, and ticket types.
Number Of Tickets Created Per Type And Organization	Overview of the number of tickets created in a specific month by type and organization. The report creator can select time period, organizations and ticket types.
Open asset tickets	List of open tickets with affected assets. The reporter can select ticket types, asset classes, and organizations.

9.2 Integrate Reports in Third-party Systems

Reports are often created in common office tools such as MS Excel (part of the Office Suite), Google Tables or Libre Office Calc. KIX Pro makes this possible by (automatically) creating a report and embedding this report as a web data source (URL) in the Office tool of your choice.

Click the info icon in the desired output format to get the URL. It is displayed in an overlay.

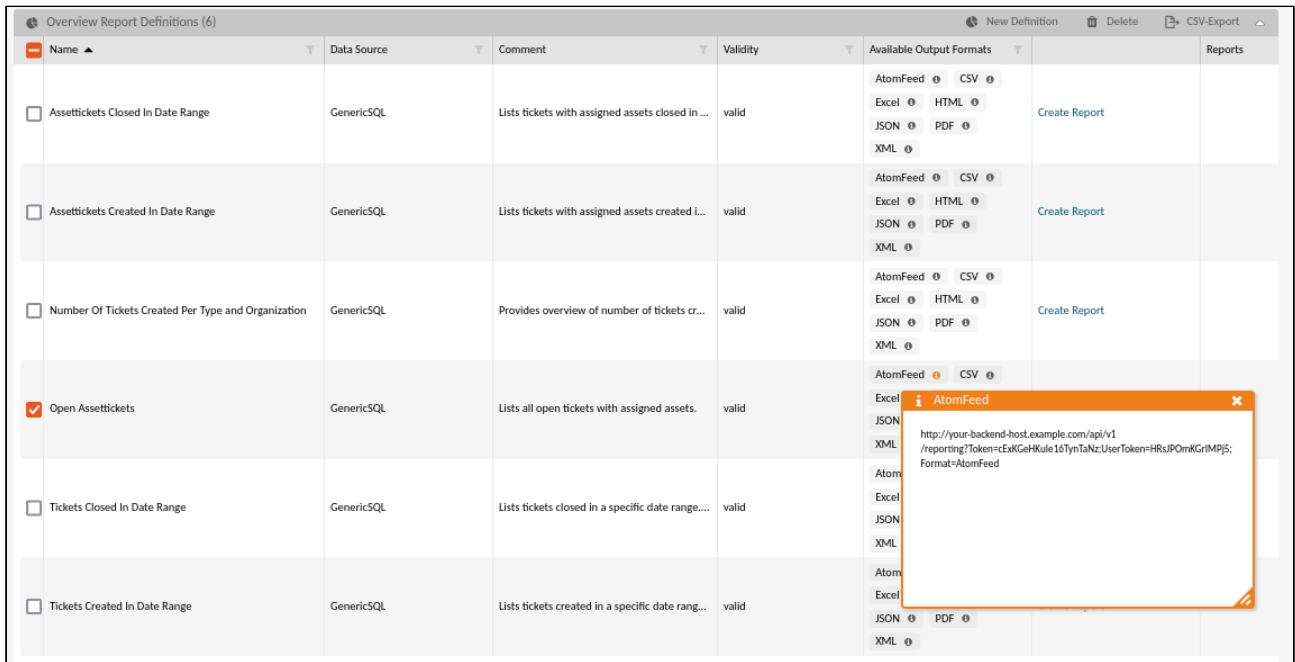


Fig. : Overlay with URL to Atom Feed

Copy the URL to the clipboard and paste it in the appropriate place in the external system:

MS Excel: File menu> Retrieve and transform data> From the web

HTML: Paste the URL into the address bar of your browser and press ENTER

PDF: File menu> Create> PDF from website

The external system calls up the data from the specified URL and displays the report. The most recently created report of the selected output format is displayed.

Note

The retrieval of report data requires that there is at least one report defining the report. This can be done manually or automatically and regularly per job (Macro Action "Create Report").

Usage

The reporting of KIX Pro uses a user token to create a URL for each output format together with the token of the report definition. This URL can be used to import reports into third-party systems (e.g. MS Excel) without additional user authentication.

Example Use in Google Sheets

For use in Google Sheets, enter the following formulas as cell values (adapt URL or copy correct one from KIX; create report data beforehand)

```
= IMPORTXML ("https: //your.kixpro-report-url.with; Formal = XML"; "//  
kix-report / rows / *")
```

```
= IMPORTDATA ("https: //your.kixpro-report-url.with; Format = CSV"; ";")
```

```
= IMPORTHTML ("https: //your.kixpro-report-url.with; Format = HTML";  
"table"; "0"; "German")
```

10 News Management

As an agent, you can create news reports. These can be optional

- in the agent portal and/or self service portal
- before or after a user logs in

are displayed. The prerequisite for this is that the admin has assigned you the "News Manager" role.

Use cases for news reports can be, for example:

- A change is made for a specific customer at a specific time. The service agents should be informed three hours before and after so that they can answer calls directly.
- There is a scope change for a product or service. All service agents should be able to see this information.

The "News Management" module is located in the menu bar under . After clicking on the module, you will see an overview of all the news items that have been created so far.

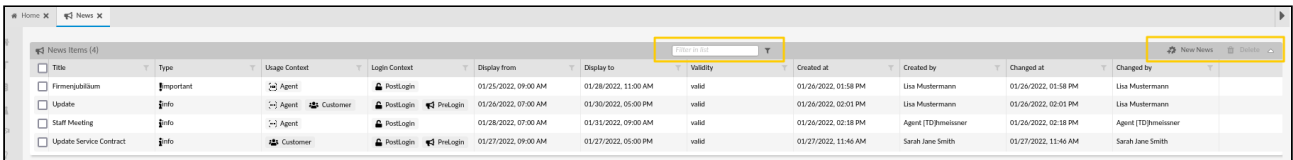
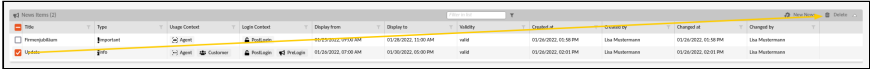


Fig.: "News Management" module

Function	Explanation
Filter	Here you have the option of searching the table for a search term. To do this, enter the term and click on the filter symbol.
New News	Clicking on the button opens the form for creating a new news item.
Delete	<p>The action becomes active as soon as at least one contribution in the table has been selected or ticked.</p>  <p>Click the button to delete the selected post. Multiple posts can also be selected for deletion at the same time.</p>
(Filter in every column)	Here you have the option of searching the respective column for a search term. Enter the term and click on the filter symbol.

10.1 Create a news post

After clicking the "New News" button, the form opens:

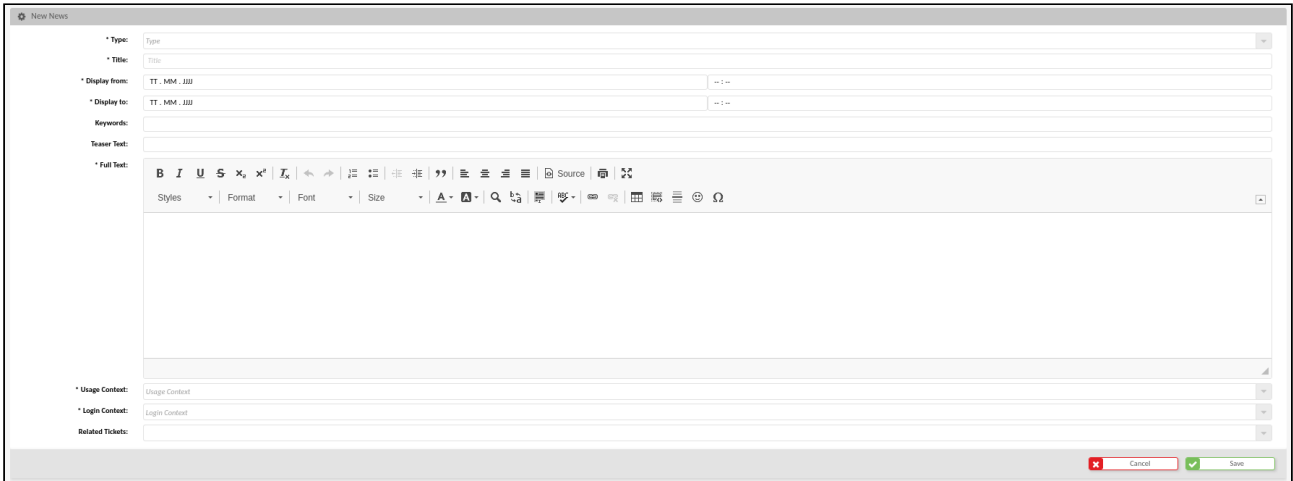



Fig.: "New News" form

Field	Explanation
Type	Select the type of news article: <ul style="list-style-type: none"> Information Advice Important Warning
Title	Enter a title for your news post. This appears as a heading in the ad.
Displayed from	Specify when the post should be displayed: day and time.
Displayed to	Set until when the post should be displayed: day and time.
Keywords	Add keywords to the news post.
Teaser Text	Write a short teaser text for your news post. This appears below the headline in the ad.

Field	Explanation
Full text	<p>Enter additional information about your news item. This appears after clicking <input type="checkbox"/> (see Fig.: News post after login).</p> <p>For example, you can enter:</p> <ul style="list-style-type: none"> • formatted text • tables • links • pictures
Usage Context	<p>Decide who should see the news by clicking on it:</p> <ul style="list-style-type: none"> • Agent • Customer • Select all <p>Confirm the selection with "Submit".</p>
Login Context	<p>Specify where/when the post should be shown:</p> <ul style="list-style-type: none"> • Pre Login • Post Login • Select all <p>Confirm the selection with "Submit".</p>
Related Tickets	<p>It is optionally possible to link one or more tickets to a news post. After clicking the field, enter a search term or a ticket number. The search results appear as a list from which you can select the relevant ticket or tickets by clicking on them. Confirm the selection with "Submit".</p> 

Finally, save the form. It appears in the overview.

10.2 News display in the Self Service Portal

The news article can be displayed in two different places in the Self Service Portal: before logging in or after.

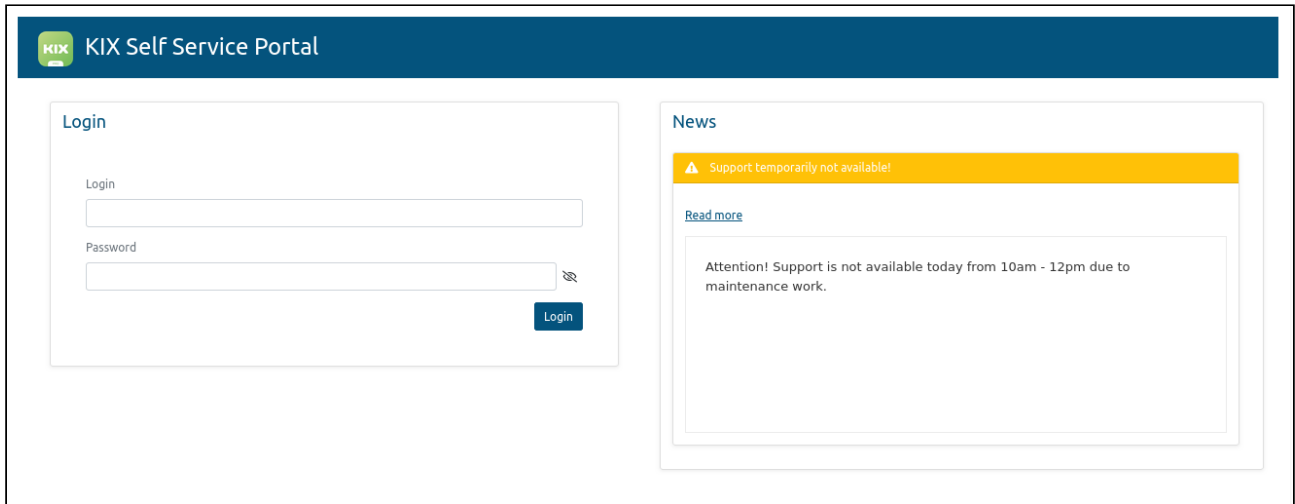


Fig.: News post in the Self Service Portal before login

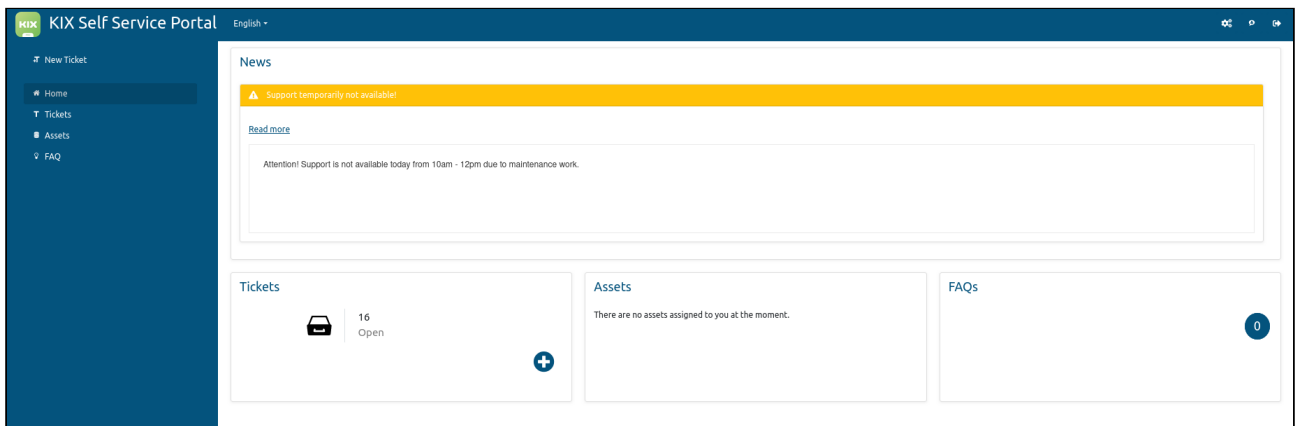


Fig.: News in the Self Service Portal post after login

10.3 News display in the Agent Portal

The news article can be displayed in two different places in the agent portal: before login or after.

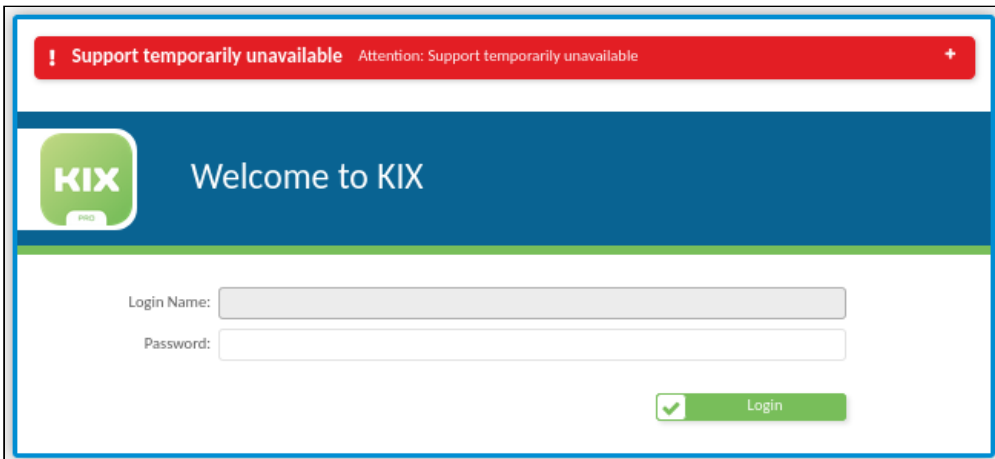


Fig.: News entry in the Agent Portal before login

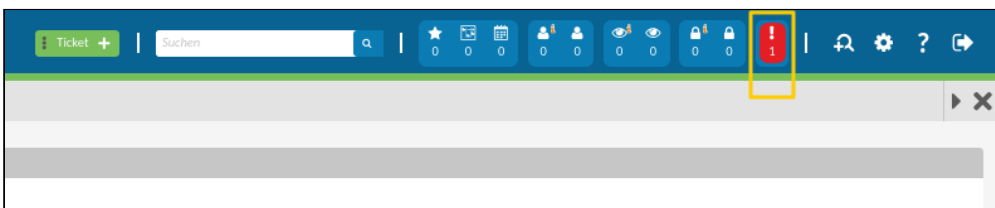


Fig.: Position of the news entry in the agent portal after login

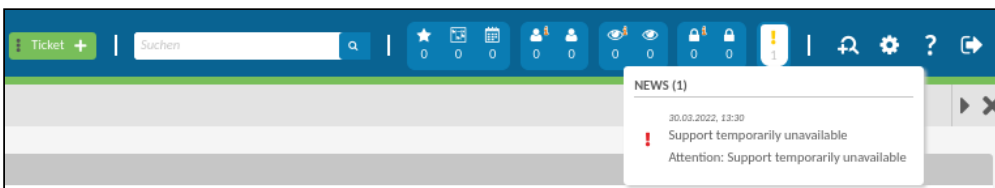


Fig.: News entry in the agent portal after login

The type of icon and the background color indicate the importance of the message:

- Exclamation mark/red - Important
- Exclamation mark in triangle/orange - Warning
- Exclamation mark/blue - Information
- Text legend/blue - Advice



11 Practice

In the practical part you will find a selection of different use cases for working with KIX.

11.1 Add-On "ITIL Practices"

To work effectively with tickets, you need ways to communicate about tickets and to exchange and capture information. KIX in combination with the add-on "ITIL Practices" provides you with the necessary means to automate certain processes in which tasks - based on events, time and defined processes - are processed. For each ticket type, there are suitable statuses and possible status transitions - both automatic and manual. The underlying process management guides customer users and agents through ticket creation and ensures that tickets run through defined processes at all times and are completed at the end. Thus, if a certain status is selected in a ticket, further process steps take place automatically.



KIX Pro 18 has been awarded SERVVIEW CERTIFIEDTOOL for 15 out of 19 possible ITIL® 4 practices. To make the use of ITIL® 4 as easy as possible for all users, the add-on "ITIL® Practices" was developed.

"ITIL Practices" is an add-on for KIX Pro 18 and is supported from version 26. It includes a number of pre-configured reports, asset classes, FAQ categories, ticket templates and actions to handle problem cases, services and management tasks according to ITIL®4. The add-on ensures that all necessary information is available in the right place and that contact persons are always informed about their tasks and the next steps in the process.

The use of processes makes workflows comprehensible and reduces sources of error. In addition, agents and customers have an overview of all information throughout the entire process at all times. The resulting shortening of processing and throughput times ensures an increase in productivity while reducing costs. The planning and control tailored to you shortens downtimes, reduces inventories and thus saves further costs.

The add-on "ITIL Practices" comes with pre-configured ticket templates and actions for the following processes:

- Service Request
- Incident
- Problem
- Change
- Contingency Plans (Business Continuity Preparation)

11.1.1 Video

You can also find a detailed showcase of the add-on "ITIL Practices" in our Youtube channel: <https://www.youtube.com/watch?v=M8Ds6TGIEWo> 

11.1.2 Implementation of ITIL practices by Means of Processes

The add-on "ITIL Practices" provides a number of already configured reports, ticket templates and actions with which problem cases, service notifications and change requests can be processed according to ITIL®4. An overview of this can be found in the chapter "Advanced Configuration".

The following prepared ITIL®4 workflows (processes) are delivered with the add-on:

- Service Request Management
 - Service Request

- Incident Management
 - Incident
 - Incident - Major
 - Incident - Security

- Problem Management
 - Problem

- Change Management
 - Change
 - Change - Emergency

- Business Continuity Management
 - Business Continuity Preparation

Tip

Scrutinise established processes at regular intervals. Adapt them by getting rid of "ballast" and streamlining processes. Sometimes a review also reveals that processes are being used differently or incorrectly. Have the confidence to abolish such processes completely if necessary. ITIL practices should help you to complete tasks quickly, easily and efficiently.

11.1.2.1 Ticket Templates

The add-on contains a separately configured ticket template for each of the above-mentioned processes. This can be found when creating a new ticket under the template group "IT Requests". The selected template determines the further course of the process.

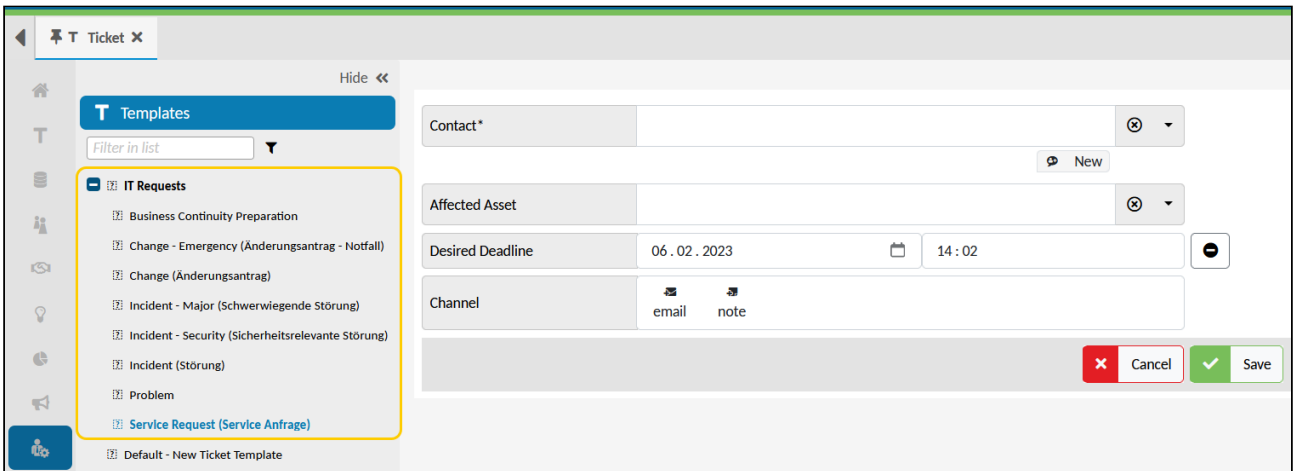


Fig.: Ticket templates for ITIL practices in the agent portal

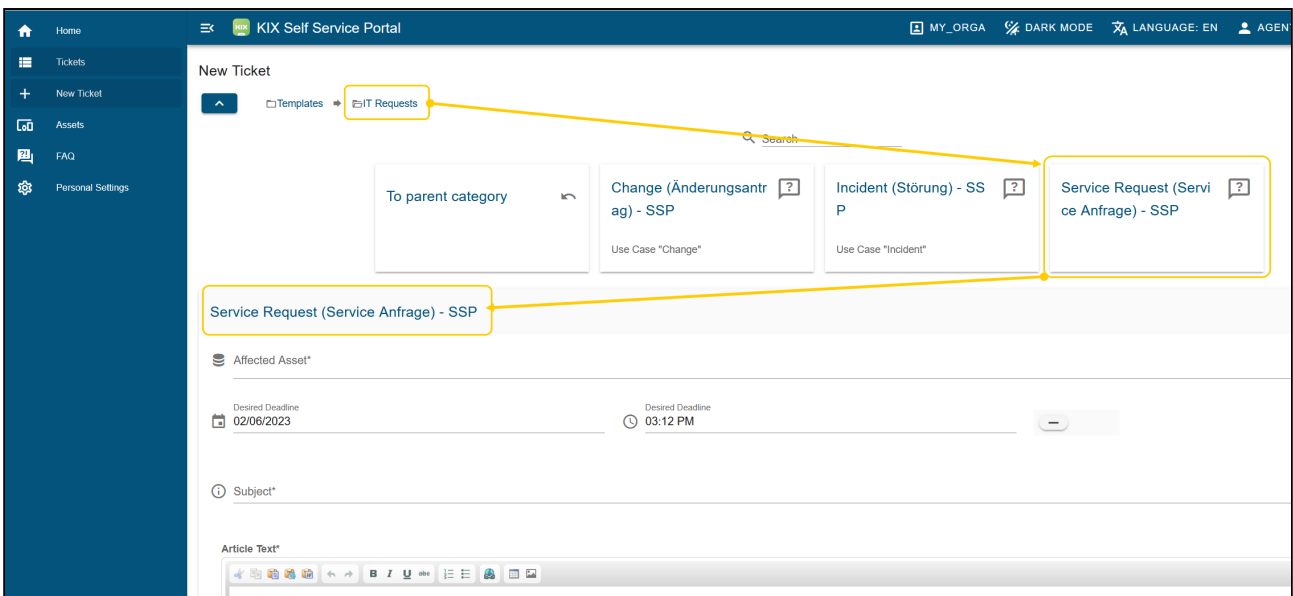


Fig.: Ticket templates that the add-on "ITIL Practices" brings with it in the SSP

11.1.2.2 Ticket Actions

ITIL Practices changes the configuration of several standard ticket actions. For example, the actions "Edit ticket" or "Close" are hidden to ensure a correct process flow.

In addition, ITL Practices implements a number of ticket actions that are required for processing. When and under which conditions an action is available on the ticket depends on the selected process and the process flow. The process flow is also based on the status of the ticket. ITIL Practices provides several new ticket statuses for this purpose.

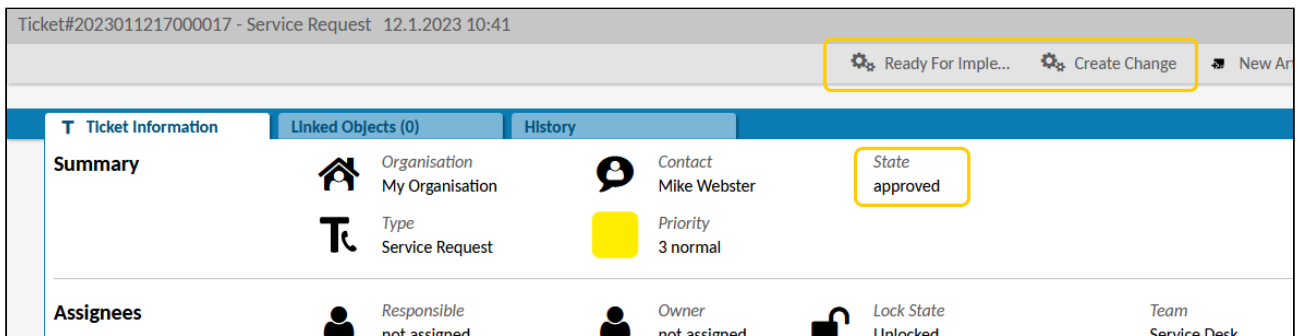


Fig.: Ticket actions depending on the ticket status.

The configuration of the actions only takes standard users into account in the delivery state. However, you can adapt the actions individually in order to restrict or extend authorisations or to integrate further dynamic fields in dialogues.

Process State

The dialogue-based ticket actions delivered with the add-on all contain the field "Process State". The process state is a dynamic field of the type Checklist. Each item on the checklist corresponds to a process step that can be answered by specifying a state. Depending on the selected state, the process state (recognisable by the progress bar) and the ticket status will change.

Status	Meaning	Process state
OK	Okay / Done / Approved	Is incremented because valid answer.
NOK	Not OK / Not executed / Not approved	Is incremented because valid answer.
PENDING	Pending status / Waiting for feedback / On hold	Is not incremented, as floating state
n.a.	No information / Information not required / No statement made	Is incremented because e.g. "no statement made" is also a valid answer.
-	Unanswered / No selection made at the checklist item	Is not incremented.

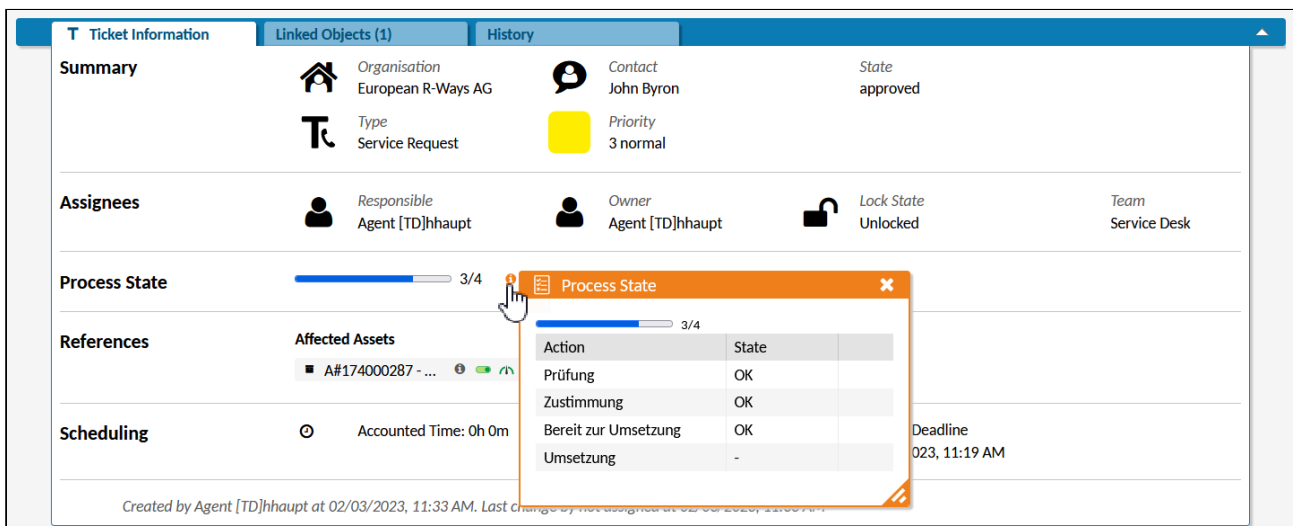
In the example of a service request, the facts are first checked. In order to confirm this, the checklist item "Review" receives the status OK. The process step of the check is thus completed and the ticket switches to the next process step "Approval". If the approval is granted, this checklist item also receives the status OK. The same applies to all further process steps (checklist items), so that the ticket is moved forward in the

process. Once all process steps have been completed, the ticket can be closed. If a process step is answered with NOK, -, n.a. or with PENDING, the process is no longer advanced.

The actions available on the ticket depend on the respective process state. This means that the actions available on the ticket are always those that are relevant for the respective process step (see above Ticket actions).

Note: The process flow cannot be undone. A change to the status of the ticket is not possible retroactively; the saved process state remains, even if the individual statuses are changed. This ensures a correct process flow. Exception: Rejection of a solution leads back to the process step "Approval".

The process state of a ticket can also be seen in the progress bar in the ticket detail view. A click on the info symbol shows the details.



The screenshot shows the 'Ticket Information' tab with various fields. The 'Process State' section features a progress bar at 3/4 and an information icon. Clicking this icon opens a 'Process State' dialog box with the following table:

Action	State
Prüfung	OK
Zustimmung	OK
Bereit zur Umsetzung	OK
Umsetzung	-

Additional details visible in the dialog include a progress bar at 3/4 and a 'Deadline' of 023, 11:19 AM.

Fig.: Process state of a ticket in the ticket detail view



11.1.3 Process 1: Service Request

A service request is usually an interruption of a service availability. A service request can be, for example:

- The completion of tasks by other departments
 - Provision of consumables
 - Procurement of hardware
- Customer enquiries
 - Resetting a password
 - Access to applications.

11.1.3.1 Flowchart of a Service Request

KIX handles a service request according to the following scheme and provides the required ticket templates, ticket statuses, actions etc. with the add-on "ITIL Practices".

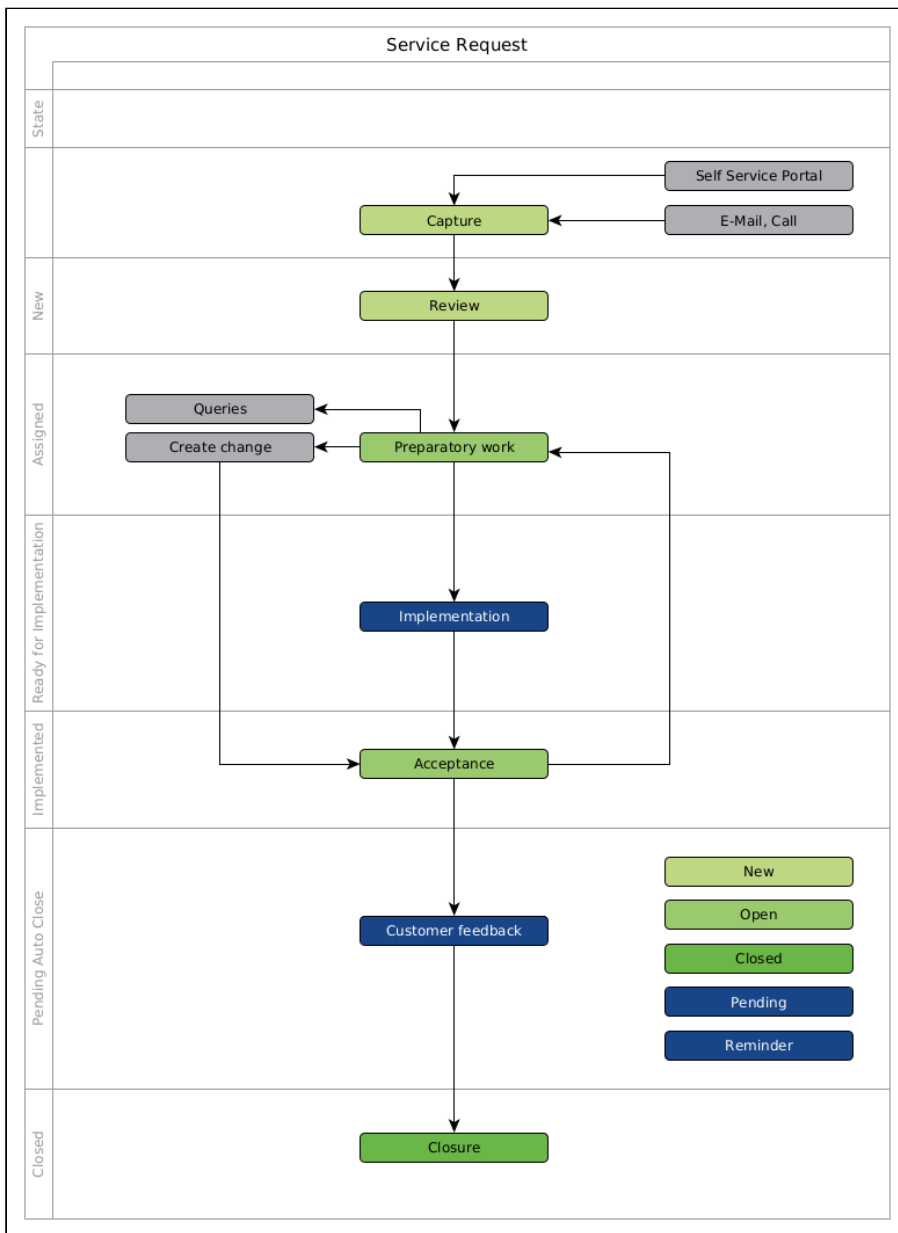


Fig.: Flowchart of the "Service Request" process

1. Capture

First, the service request (e.g. provision of consumables) is captured and a new ticket is created for it. The ticket template "Service Request" is used to record the service request.

With saving, the ticket changes to the next process step "Review" and receives the standard values for priority (normal) and status (new).



2. Review

During the review, the facts are checked and assigned to the responsible agent. The "Review" action on the ticket is available for this purpose. It opens a dialog in which, among other things, the responsible agent can be selected and the priority can be reset.

If the "Review" process step receives the status OK, the ticket is forwarded to the next process step "Ready for Implementation" when the ticket is saved.

- The ticket is transferred to the next process step "Ready for Implementation"
- Assigned to the team of the selected agent.
- The ticket status is set to "assigned".

3. Ready for Implementation

Once the service request is assigned, its implementation can be prepared. A procurement and thus another ticket (child) may be necessary (see "Branch to the Change Process" below). The ticket is then in a pending status. Once the procurement has taken place, the implementation can also take place. For this purpose, the action "Ready for Implementation" is available on the ticket (one-click action without dialogue). The use of the action gives the OK for the implementation, so that the ticket is transferred to the next process step. The ticket status remains "ready for Implementation".

4. Implementation

Once the necessary preparatory work (e.g. ordering the consumables) has been completed, the service request can be implemented. The action "Implementation" is available on the ticket for this purpose. It opens a dialogue to store the result and/or notes on the implementation on the ticket. For example, to note the reasons for a failed implementation.

If the implementation is answered with OK, the ticket receives the status "implemented". In the next process step, the solution can be accepted or rejected.

5. Acceptance

If the conversion has taken place (e.g. the consumable has been delivered), the solution can be accepted (e.g. correct consumable) or rejected (e.g. wrong consumable). The ticket actions of the same name are available on the ticket for this purpose.

If the solution is rejected, the ticket is reset to the 3rd process step (Ready for Implementation) so that the process can start again.

If the solution is accepted, the process is considered completed. The ticket is set to the status "pending auto close". assigned.



Branch to the Change process

If the action "Create Change" is provided on the ticket, this enables a process branch. For example, if procurement measures (e.g. ordering consumables) are required for a service request. The action creates another ticket (child) and links it to the source ticket (parent).



11.1.4 Process 2: Incident

The process of an incident usually involves the interruption of a service or an unplanned event that leads to the failure of a service. The aim is to restore normal service operation as quickly as possible.

An incident can be, for example:

- functional impairment of a web server
- an interrupted power or data connection
- an error message reported by a device
- failure of a business application
- a cyber attack
- defective hardware or equipment
- and many more.

11.1.4.1 Flowchart of an Incident

If an incident is reported, a ticket can be created in KIX according to the process "Incident". The process of an incident runs according to the following scheme:

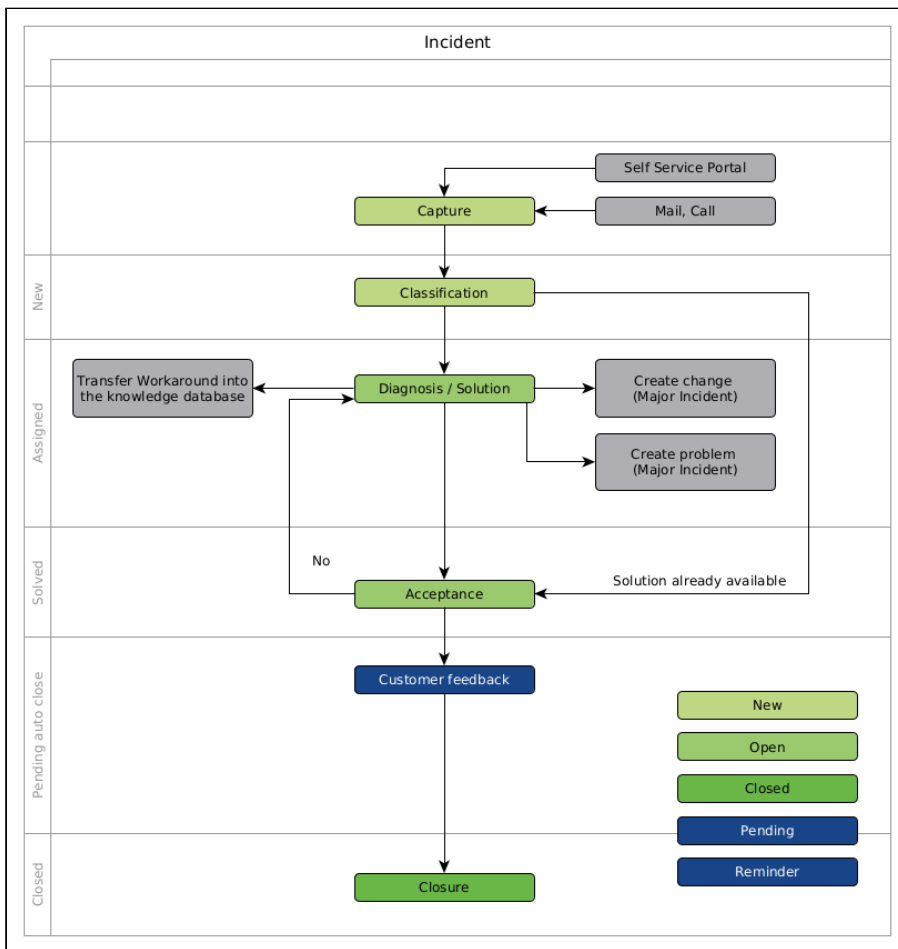


Fig.: Flowchart of the "Incident" process

1. Capture

The add-on "ITIL Practices" distinguishes according to the type of incident:

- Incident
- Incident - Major
- Incident - Security

The add-on provides a ticket template with the same name for each of these incident types.

When saved, the ticket receives the standard values for priority (normal) and status (new). In the next process step - when classifying the ticket - the ticket can be evaluated differently.

2. Classification

By classifying, the severity of the disruption is indicated and the urgency of the ticket is classified. This is based on the effects of the impact. The action "Classification" is available on the ticket. In the dialogue that opens, the impact can be classified, the priority can be changed, the symptoms can be described and the ticket can be assigned to the responsible agent. The priority of the ticket cannot be changed after it has been classified.

After saving, the ticket receives the status "assigned" and switches to the next process step "Diagnosis" or "Solution".

3. Diagnosis

Diagnosis identifies the cause of the incident. The action "Diagnosis" is available on the ticket for this purpose. If the diagnosis is confirmed with OK, the ticket receives the status "in process". The action "Diagnosis" is still available on the ticket, so that changes can be made, e.g. to the effect or additions to the symptom/cause.

The process step "Diagnosis" can be skipped if a solution is available, e.g. if the problem has already been solved. Then use the ticket action "Solution".

4. Solution

At the end of the incident process is the solution. A ticket action with the same name is available on the ticket. In the dialogue that opens, the following can be specified, among other things:

- Solution description: e.g. work carried out, information on non-feasibility, etc.
- WorkAround: Description of an alternative procedure or a workaround. If a workaround is specified, an FAQ entry is automatically created.
- Close code: Specification of the solution (completed, not completed, etc.).

If a close code is selected and the processing status of the solution is answered with OK, the ticket receives the status "solved" and switches to the next process step "Acceptance".



5. Acceptance

If the fault is solved (positively or negatively), the solution can be rejected or accepted. The ticket actions of the same name are available on the ticket for this purpose.

- If the solution is accepted, the process is considered successfully completed. The ticket is set to the status "pending auto close".

Branch to the Change process

If the action "Create change" is provided on the ticket, this enables a process branch to the change management, e.g. if procurement measures are required (e.g. ordering new server technology). The action creates another ticket (child) and links it to the source ticket (parent).

Branch to the Problem process

The ticket action "Create problem" is available for "Incident-major" faults. It enables a process branch to the problem management, e.g. if a frequently recurring defect is the cause of the incident. The action opens a dialogue for creating a new item and creates another ticket of the type "Problem" in parallel.

11.1.5 Process 3: Problem

A problem is usually the (possible) cause of (recurring) malfunctions (incidents). Problem management is concerned with identifying and managing these causes. The goals are to solve problems permanently, to avoid costly disruptions and to secure knowledge about (known) problems.

A problem can be, for example

- a changed configuration file
- causes of a damaged database entry
- software error
- and many more.

11.1.5.1 Flowchart of the Problem process

If there is a problem based on the guideline values of ITIL®4, a corresponding process ticket "Problem" can be created in KIX. The problem management in KIX runs according to the following scheme:

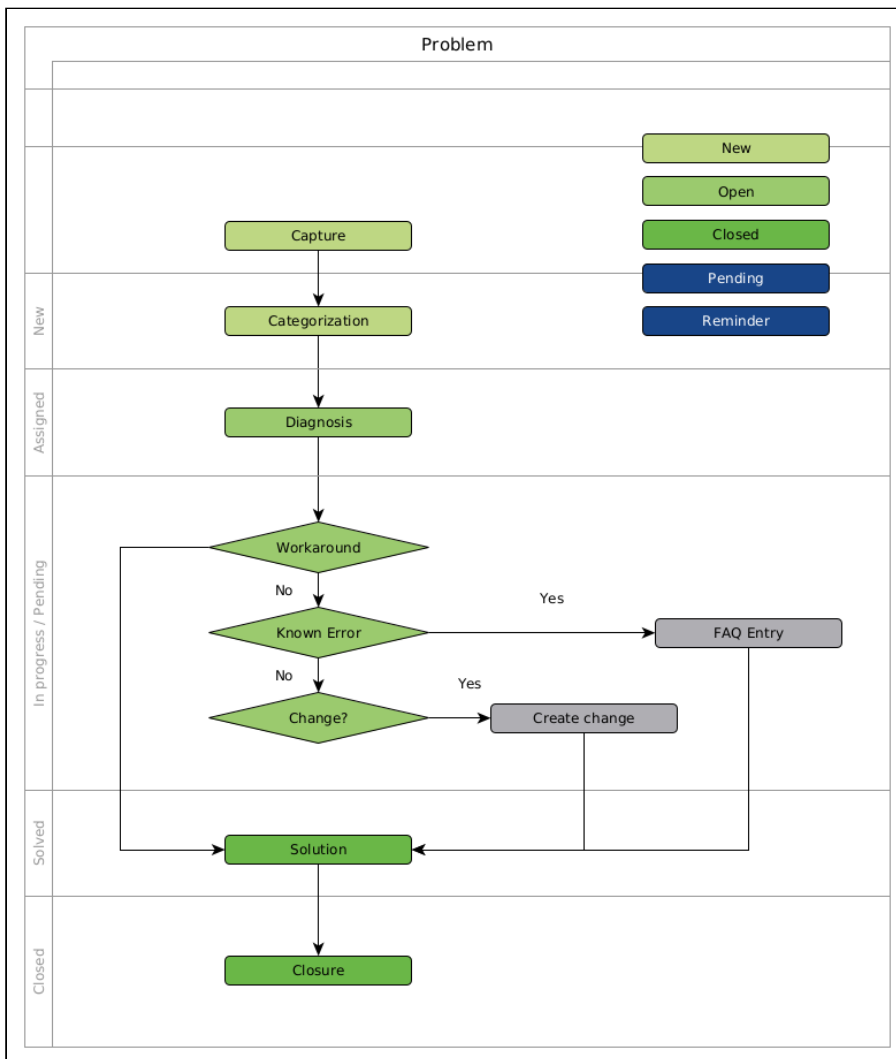


Fig.: Flowchart of the "Problem" process

1. Capture

The recording of a problem can be done in different ways:

- manually: using the ticket template "Problem".
- automated: using the ticket action "Problem" (process: Serious Incident) .

The created ticket receives the standard values for priority (normal) and status (new) and switches to the next process step "Categorization".

2. Categorization

Categorising the ticket helps to evaluate the problem and give it a control variable. For this purpose, the ticket has the action "Categorization". It opens a dialogue in which, among other things, priority, impacts and

error category can be determined. The impacts depend on the type of impairment of the service. The error category is used to classify the problem in subject areas.

If the categorisation is answered with OK, the ticket receives the status "assigned" and switches to the next process step "Diagnosis".

3. Diagnosis

The diagnosis serves to identify the problem and to confirm or reject it. The ticket contains the action "Diagnosis" for this purpose. The result of the diagnosis is indicated in the "Problem State" field.

Once this has been done and the diagnosis has been confirmed with OK, the ticket receives the status "in progress" when it is saved.

The action "Diagnosis" is still available on the ticket, so that changes can be made, for example, to the problem status or additions to the symptom/cause.

The process step "Diagnosis" can be skipped if a solution is available. Then use the ticket action "Solution".

4. Known Error

A Known Error is an error with a known cause. A FAQ entry can be created for such errors. The action "Known Error" is available on the ticket for this purpose. It automatically creates a FAQ entry based on the information stored in the ticket - without dialogue - and links it to the source ticket.

5. Solution

If the problem could be solved or if a workaround to the problem exists, the ticket can be closed. This is done using the ticket action "Solution". In the dialogue that opens, the following can be specified, among other things:

- Solution description: e.g. work carried out, notes on non-feasibility, etc.
- Workaround: Description of an alternative procedure or a workaround. If a workaround is specified, an FAQ entry is automatically created.
- Problem state: The problem status must be specified if the process step "Diagnosis" was skipped.

If the problem status is set and the processing status of the solution is answered with OK, the ticket is closed directly. The process step of acceptance is omitted.

Branch to the Change process

If the action "Create change" is provided on the ticket, this enables a process branch to Change Management. The action opens a dialogue for creating a new item and creates another ticket of the type "Change" in parallel. Both tickets are linked to each other as a parent-child relationship.

11.1.6 Process 4: Change

Organisational or infrastructural changes that can have direct or indirect effects on services are assigned to change management.

A change can be, for example

- the replacement of a device
- introduction of new services
- etc.

11.1.6.1 Flowchart of a Change Request

KIX handles a change process according to the following scheme and provides the required ticket templates, ticket statuses, actions etc. with the add-on "ITIL Practices".

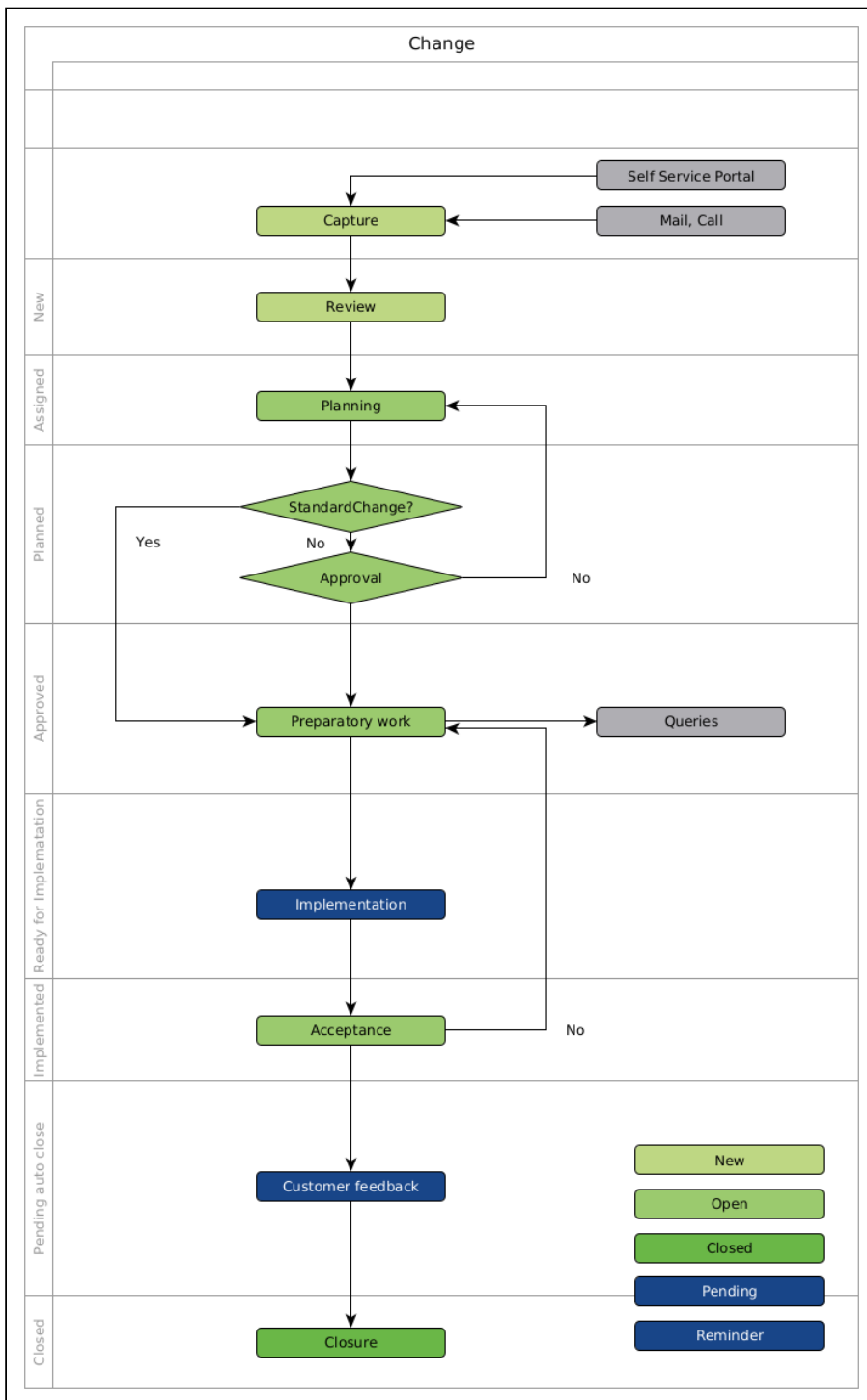


Fig.: Flowchart of a "Change" process in KIX

1. Capture

The add-on "ITIL Practices" distinguishes according to the type of change request:

- Change (Change request | Änderungsantrag): common changes with low or increased risk.

- Change - Emergency (Change request - Emergency): Changes due to an unexpected fault that needs to be fixed immediately.

The add-on provides a ticket template of the same name for each of these incident types. The procedure is the same for both change processes.

In the Business Case area, the

- the *reasons* for the request
- the *benefits* that the change will bring
- likely *implementation costs*
- and possible *alternatives*

can be noted.

The entry of a change request can be done in different ways:

- manually: using the corresponding ticket template
- automatically: by using the ticket action "Create change".

The created ticket receives the standard values for priority (normal) and status (new) and switches to the next process step "Review".

2. Review

During the review, the facts are checked and possible risks are assessed. For this purpose, the action "Review" is available on the ticket. Several risks can be noted in the dialogue that opens.

The selection in the field "Standard Change" classifies the change:

- Standard Change - yes:
 - Usual changes, low-risk, frequently recurring, pre-approved (e.g. replacement of a headset).
 - Skips the "Approval" process step
- Standard Change - no:
 - Changes with increased risk or high financial expenditure (e.g. replacement of the backup server).
 - Requires approval

If the process step is completed with OK, the ticket receives the status "assigned" and switches to the next process step "Planning".

3. Planning

During planning, an estimate of the costs and consideration of any possibilities to reverse the changes is made. This can be specified using the ticket action "Planning".

If the process step is completed with OK, the ticket receives the status "scheduled" and switches to the next process step "Approval".

4. Approval

For change requests with increased risk or financial effort, approval is required before implementation. The ticket action "Approval" is therefore available for tickets that are not a standard change (see check). The action opens a dialogue in which the approval can be given in the processing status.

In case of approval (OK), the ticket changes to the status "approved" and to the next process step "Ready for Implementation".

In case of rejection (NOK), the ticket remains in the process step "Approval" until it has been granted and receives the status "planned".

5. Ready for Implementation

Once the change request has been approved, its implementation can be prepared. The ticket is in a pending status until, for example, all queries have been clarified and changes to the next process step "Implementation" after clicking on the ticket action "Ready for Implementation".

6. Implementation

After the hardware has been completely replaced, for example, the conversion is considered completed. The ticket action "Implementation" exists on the ticket. It opens a dialogue for documenting the implementation.

If the implementation is answered with OK, the ticket receives the status "implemented". In the next process step, the solution can be rejected or accepted.

7. Acceptance

Finally, the result of the conversion can be rejected or accepted. The ticket actions of the same name are available on the ticket for this purpose.

- If the solution is rejected, the ticket is reset to the 3rd process step (planning) so that the process can start again.
- If the solution is accepted, the process is considered completed. The ticket is set to the status "pending auto close".

11.1.7 Process 5: Business Continuity Preparation

Contingency plans are used to keep business operations running in the event of interruptions to business processes or services. The contingency plans available in the form of FAQs can be used to remedy the situation quickly.

11.1.7.1 Flowchart for contingency plans

KIX handles contingency plans according to the following scheme and provides the required ticket templates, ticket statuses, actions, etc. with the add-on "ITIL Practices".

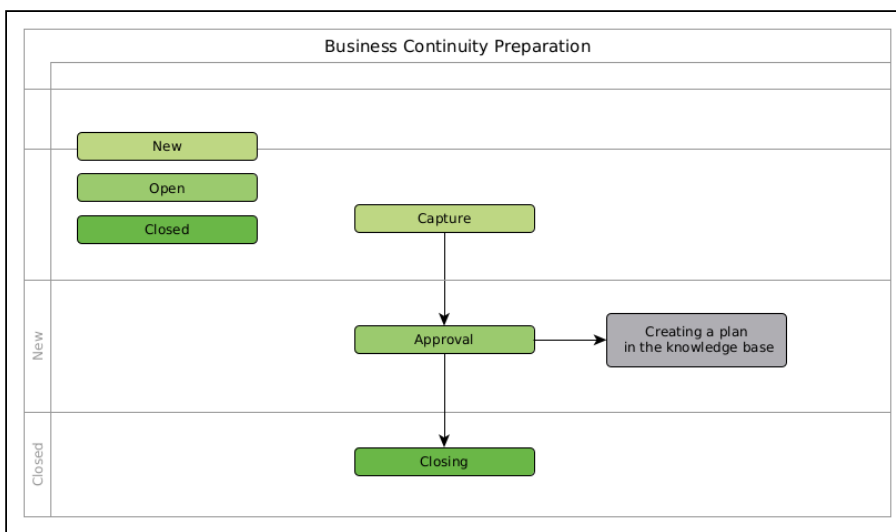


Fig.: Flowchart "Contingency plan" process

1. Capture

The ticket template "Business Continuity Preparation" is used to create an contingency plan. In the dialogue that opens, the task steps to be carried out in an emergency can be entered, among other things.

After saving, the ticket receives the standard values for priority (normal) and status (new). In the next process step, the approval can be given.

2. Approval

In order for the prepared contingency plan to be stored in the FAQ, it must be approved. For this purpose, the ticket has the action "Approval". It opens a dialogue in which the approval can be given or rejected.

If the ticket is approved, a new FAQ entry is created.

In case of rejection, the ticket remains in the process step "Approval", so that the contingency plan can be changed and accepted at a later point in time.



3. Closing

Approval of a contingency plan gives it the status "created". Depending on the customer-specific definition, measures and work steps must then be completed in order to resolve the emergency. This concludes the process.

11.2 Maintenance Plan

The add-on "KIX Maintenance Plan" supports you with recurring maintenance tasks. It enables you to manage recurring tasks for the devices, contracts or operating equipment documented in the asset management.

Main use scenarios are:

- Planning, execution and documentation of maintenance
- Reminder/renewal of contracts, certificates, approvals and statutory inspection periods, e.g.:
 - regular inspections according to BGV/GUV-V A 3
 - regular inspections of machines, vehicles, production facilities
- Representation of non-availabilities of operating resources
- Automatic creation of task descriptions and maintenance orders
- Digital equipment logbook/object life history

Based on your freely defined maintenance plans, the add-on generates the upcoming maintenance tasks and creates the corresponding tickets when they are due. Clear lists and calendars inform you about upcoming, planned and completed maintenance tasks. In this way, you keep track of all maintenance tasks and can perform them according to the due date and fully documented.

11.2.1 Prerequisite

As a basis for using the add-on "KIX Maintenance Plan", you need KIX 18 Pro, which runs at least on version 29.

11.2.2 Basics

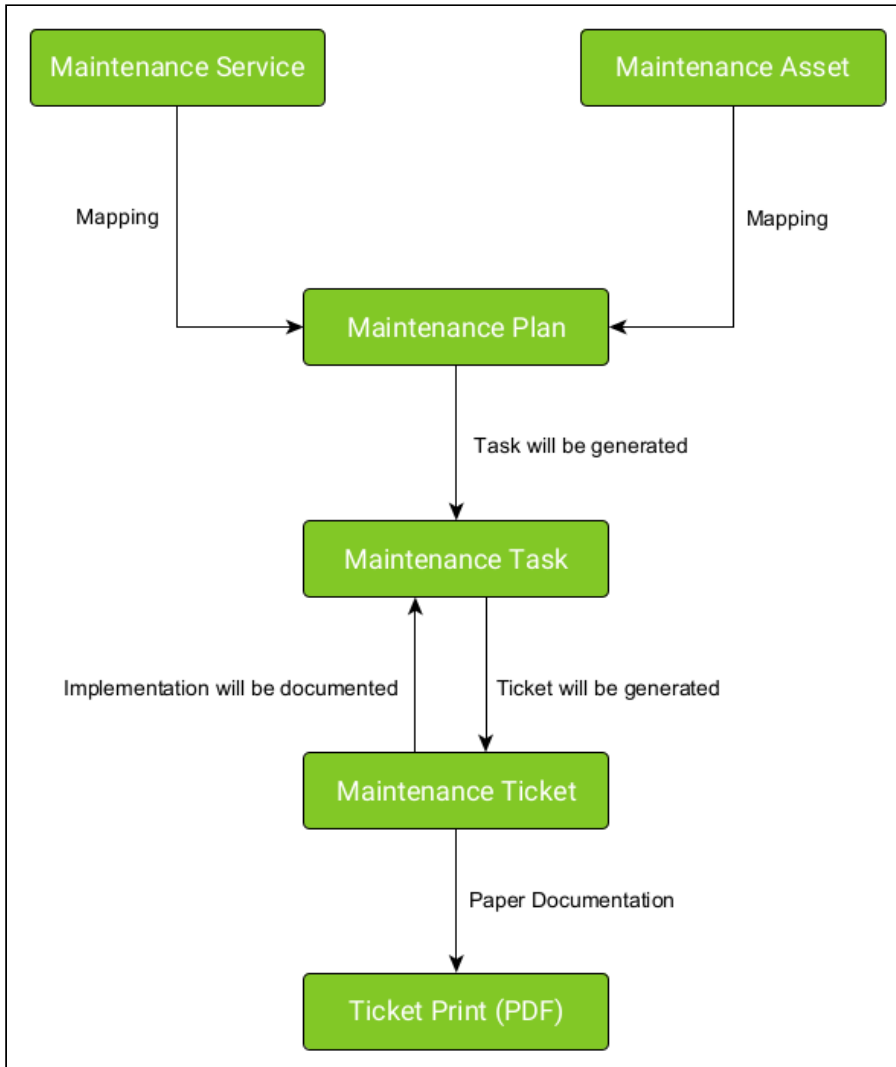


Fig.: Flow chart add-on "KIX Maintenance Plan"

Each maintenance is a service in the service catalogue. Therefore, the maintenance services are created in the asset class "Service" so that they are subsequently available in the explorer of the "Maintenance Plan" module.

In the "Maintenance Plan" module, the maintenance plans are created and the maintenance services are linked to the corresponding assets. KIX creates the resulting maintenance tasks once a day based on the defined maintenance plans.

The maintenance plan defines, among other things, at which point in time the tickets for the maintenance to be carried out are to be created. At this time, KIX generates the tickets to perform the maintenance. Administrators can freely configure the ticket templates to be used by the system for this purpose.

The execution of the maintenance is documented at the maintenance task by storing, among other things, the respective status and the data on due date and completion.

11.2.2.1 Maintenance service

A maintenance service defines *WHAT* the maintenance includes. It describes the service to be performed on the asset (e.g. grease all rotating gear parts).

Each maintenance service is an asset of the asset class "Service" and therefore part of the service tree. Therefore, maintenance services are created as assets of the asset class "Service".

11.2.2.2 Maintenance asset

A maintenance asset defines the *WHERE* of maintenance. Maintenance assets are all assets that are subject to (regular) maintenance. This can be any asset in the system, but also a service (e.g. life cycle check).

11.2.2.3 Maintenance plan

The maintenance plan is the heart of the planning. It defines the *HOW* of maintenance. Here the mapping (linking) of maintenance service and maintenance asset takes place and it is determined *WHAT WHERE* and *WHEN* is planned. Maintenance plans are created and managed in the "Maintenance plan" module.

Mapping

In the simplest case, a maintenance plan is characterised by the fact that a maintenance service and a maintenance asset exist and are assigned to each other. The assignment can take place through

- explicit assignment of a maintenance service to a concrete asset
- Assignment of a maintenance service to various assets that fulfil certain conditions (e.g. all assets of the class Computer, of the manufacturer XYZ, in operation since 01.01.2023).

i Due to this flexibility, future assets that fulfil the criteria are also taken into account in the maintenance plan without having to adjust the maintenance plan.

Scheduling

In the maintenance plan, the schedule can be defined:

- how often the maintenance should be carried out (periodicity)
- the duration of the advance planning (Projection Days)
- the time of ticket creation (Planning Days)
- the validity period of the maintenance plan

- the planning type
 - Schedule Based
 - Completion Based

Ticket templates

When setting up the maintenance plan, the ticket template to be used can be selected. The ticket template is used by the system to generate the maintenance tickets for scheduling the maintenance task at the given time. According to the template configuration, the assigned team, the contents of the task description, FAQ references, etc. are thus defined for the implementation of the maintenance (see also section below).

11.2.2.4 Maintenance tasks

KIX checks the list of maintenance plans once a day. It checks which tasks exist for which maintenance plans within the next n days. As a result of this check, the maintenance tasks are determined and created. The maintenance tasks are displayed in the "Maintenance plan" module (list and calendar) as well as on the respective assets and services. This check can also be triggered manually at any time, e.g. after changes to a maintenance plan.

Maintenance Tasks (5)									
<input type="checkbox"/>	Service	State	Plan Due Date	Completion Due D...	Ticket Number	Ticket State	Ticket Title	Completion Date	
<input type="checkbox"/>	Service 1	canceled	06/23/2023	07/07/2023	2023063017000028	closed	Maintenance Service ...		
<input type="checkbox"/>	Service 1	done	06/16/2023	06/30/2023	2023063017000019	closed	Maintenance Service ...	06/30/2023, 12:58 PM	
<input type="checkbox"/>	Service 1	planned	06/30/2023	07/14/2023	2023063017000037	new	Maintenance Service ...		
<input type="checkbox"/>	Service 1	projected	07/07/2023	07/21/2023					
<input type="checkbox"/>	Service 1	projected	07/14/2023	07/28/2023					

Fig.: List of maintenance tasks on the asset

Note

Please note: Maintenance tasks are not tickets! Maintenance tasks only inform about planned maintenance and serve as maintenance documentation. The tickets for performing the maintenance will be created at a later time (as defined in the maintenance plan).

The maintenance tasks are the core element of the maintenance documentation (maintenance history). All information is brought together here:

- the concrete asset that is/was maintained
- the concrete maintenance service that is/was carried out
- the date of the planning due date
 - This is the date on which the ticket should be created.
- the planned execution date
 - This is the date on which the maintenance should be carried out.
- the actual execution date

- The time when the maintenance was actually performed.
- the status of the maintenance task
 - projected: Created maintenance task that is expected to result in a maintenance ticket.
 - planned: Task for which a maintenance ticket has already been created.
 - done: Maintenance ticket has been closed (not cancelled).
 - cancelled : Maintenance ticket has been cancelled.

11.2.2.5 Maintenance ticket

Maintenance tickets are tickets that the system generates using the information stored in the maintenance plan. They are used to schedule and then perform the maintenance task.

The mechanism for checking and creating maintenance tasks also checks the due date of the maintenance tasks and creates the associated maintenance tickets a few days before the due date (as defined in the maintenance plan).

Maintenance tickets are displayed

- at the respective asset
- at the respective service
- in the Maintenance Plan module (calendar and list)
- in the ticket dashboard

After creating the maintenance ticket, the status of the maintenance task changes from "projected" to "planned".

After the maintenance has been performed, the ticket can be closed. When the ticket is closed, the selected completion code and - if "completed" - the completion time are written back to the maintenance task.

For the documentary documentation of the maintenance, the maintenance ticket can be downloaded as a PDF and printed and filed if required.

11.2.3 Procedure of a Maintenance Plan

Each maintenance is a service in the service catalogue. Therefore, the maintenance services are created in the "Service" asset class so that they are available in the "Maintenance Plan" module.

In the "Maintenance Plan" module, the maintenance plans are created and the maintenance services are linked to the corresponding assets. KIX creates the resulting maintenance tasks once a day based on the defined maintenance plans.

The maintenance plan defines, among other things, at which point in time the tickets for the maintenance to be carried out are to be created. At this time, KIX generates the tickets to perform the maintenance. Your admin can freely configure the ticket templates to be used by the system for this purpose.

The execution of the maintenance is documented at the maintenance task by storing, among other things, the respective status and the data on due date and completion.

The module "Maintenance Plan" is located in the menu bar under . After clicking on the module, you will see an overview of all maintenance plans created so far.

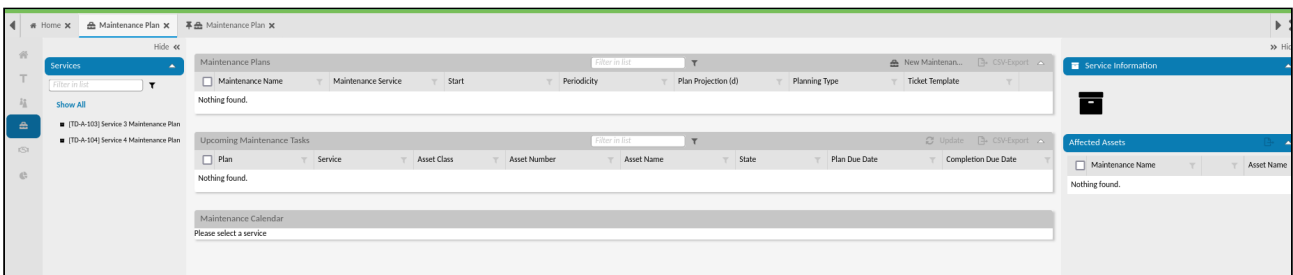



Fig.: Module "Maintenance Plan" directly after installation

The menu for this module is located on the left-hand side of the screen. All services within which you can create a maintenance plan can be found in a tree structure. If you need a service that has not yet been created, create a new asset of the asset class "Service".

The following functions are available in the dashboard:

Filter	Here you have the option of searching the table for a search term. To do this, enter the term and click on the filter symbol.
New Maintenance Plan	Clicking the button opens the form for creating a new maintenance plan.
CSV-Export	The action becomes active as soon as at least one maintenance plan has been selected or ticked in the table. Further information on this can be found in the chapter "General function descriptions".



Update Tasks	By clicking on the button, you bring the pending maintenance tasks up to date. The button is only active if you have selected a service or the maintenance plan.
 (Filter in each column)	Here you have the option of searching the respective column for a search term. To do so, enter the term and click on the filter symbol.

11.2.3.1 Sidebars

In addition to the Dashboard, sidebars are available which you can show or hide as required.

Service Information

Here you will find all the information stored in the system for the selected service of the maintenance plan, such as the planned (time) effort.

Affected Assets

Here you can see all the assets affected by the maintenance plan. The view depends on the variant selected when creating the maintenance plan: "Affected Assets" (individual display) or "Search Profile" (display of all affected assets).

11.2.3.2 How do I create a maintenance plan?

After clicking the button "New Maintenance Plan" the form opens:

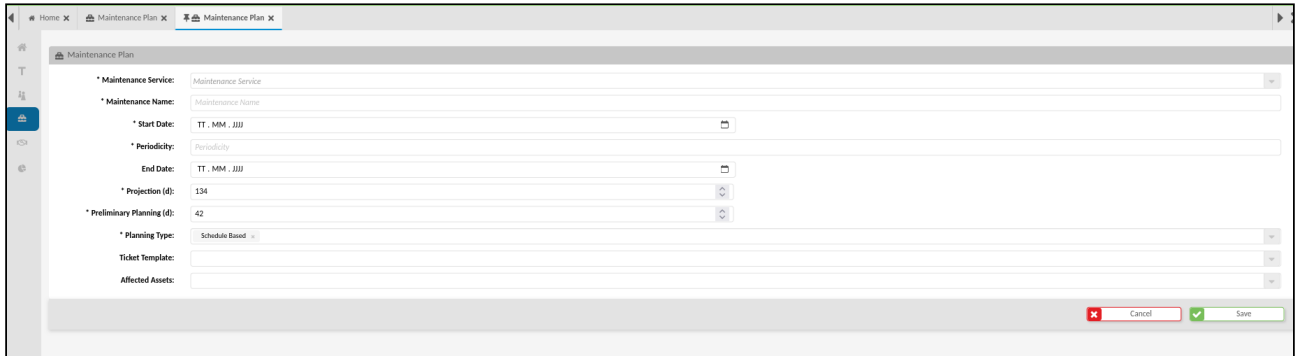


Fig.: Form "New maintenance plan"

Fields marked with * are mandatory fields and must be filled in.

Field	Content						
Maintenance Service	From a drop-down menu, select the maintenance service that corresponds to the service required for the maintenance.						
Maintenance Name	Assign a unique name for the maintenance plan.						
Planning Type	Here you define the time interval on which the maintenance is based. <table border="1" data-bbox="491 1346 1423 1697"> <tbody> <tr> <td>Schedule Based</td> <td>Oriented to a fixed timetable or deadline.</td> </tr> <tr> <td>Completion Based</td> <td>Depends on the completion of the previous maintenance.</td> </tr> <tr> <td>Week Day per Month Based</td> <td>Always takes place on a specific day per month.</td> </tr> </tbody> </table>	Schedule Based	Oriented to a fixed timetable or deadline.	Completion Based	Depends on the completion of the previous maintenance.	Week Day per Month Based	Always takes place on a specific day per month.
Schedule Based	Oriented to a fixed timetable or deadline.						
Completion Based	Depends on the completion of the previous maintenance.						
Week Day per Month Based	Always takes place on a specific day per month.						
Start Date	Enter the date from which planning tasks are due for the first time.						
End Date	Enter the date on which planning tasks are due for the last time. This entry is optional. If you omit it, the maintenance plan runs without a time limit.						

Field	Content
Periodicity	<p>Specify the frequency with which the maintenance is due. The form must follow the following pattern: "<number>y <number>m <number>w <number>d" (e.g. "2y" = "every 2 years"; "1m" = "every month"; "27d" = "every 27 days").</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i Excursus: Example based on interval weekday per month</p> <p>The maintenance plan is created on July 13th, 2023, a Thursday. This is also the start date of the maintenance plan.</p> <p>The maintenance tasks shall be scheduled every 3rd Tuesday of every 4th month.</p> <p>The executions will take place on:</p> <ul style="list-style-type: none"> • 1st execution July 18th, 2023 (This is the 3rd Tuesday in the start month and after the start date July 13th), • 2nd execution November 21st, 2023 (3rd Tuesday 4 months later) as well as • 3rd execution March 19th, 2024 (3rd Tuesday 8 months later). </div>
Projection (d)	Preview duration: Enter the number of days, starting from today, for which tasks are to be created.
Preliminary Planning (d)	Enter the number of days before a maintenance is due that a ticket should be created. The planning task thus changes from "projected" to "planned".
Ticket Template	<p>Select a ticket template to be used for planning the maintenance task. This will be used, for example, to pre-fill the assigned team, contents of the task description, FAQ references as well as further details for the implementation of the maintenance.</p> <p>i If you do not have a template that suits your needs, please contact your admin.</p>

Field	Content
Search Profile	<p>Activate the search profile by clicking the button. Create asset search profiles to apply this maintenance plan also to assets created later without having to explicitly select them again. All assets that correspond to this search profile are subject to the maintenance plan during foresight and planning.</p> <p>The search profile is automatically updated once a day.</p>
Affected Assets	<p>Specify which asset or assets are affected by this maintenance plan. Enter at least three characters to start the search.</p>

i You can either enter an affected asset or enter a search profile.

Finally, save the form. It appears in the overview.

Calculation of the timing of maintenance tasks

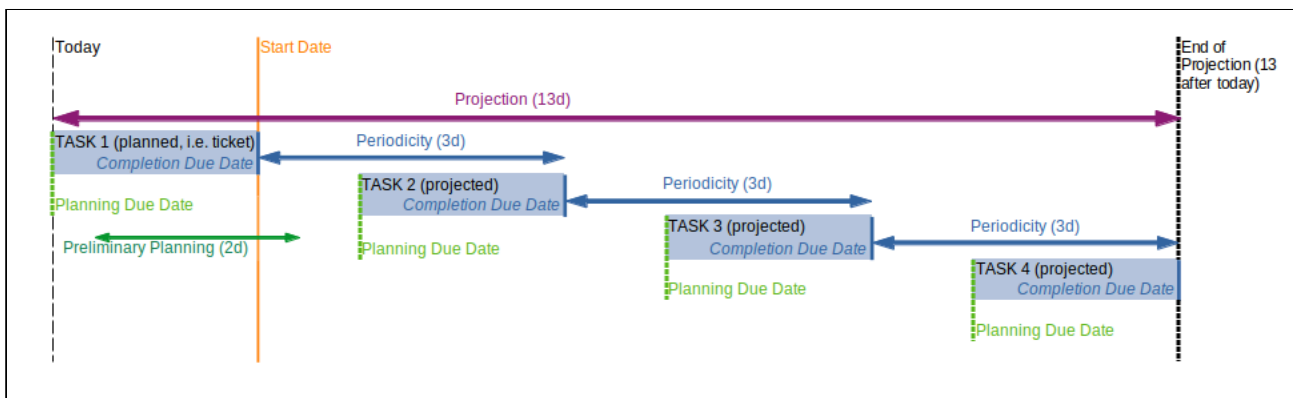


Fig.: Graphical representation for calculating the timing of maintenance tasks

11.2.3.3 Overview of a maintenance plan

After creating a maintenance plan **1**, the system calculates all entered values and displays:

- **2** Planned maintenance (a ticket already exists for these, based on entry in the "Projection" field when creating the maintenance plan).
- **3** Projected maintenance (no tickets have been created yet, based on the entry in the field "Preliminary Planning" when creating the maintenance plan)
- Maintenance planned **4** and projected **5** in the calendar

The screenshot displays the 'Maintenance Plan' overview in the KIX software. It includes a table of maintenance plans, a list of upcoming tasks, and a calendar view for September 2023. The interface is annotated with numbered callouts:

- 1**: Points to the 'Maintenance Plans (1)' table, which lists details like Maintenance Name, Service, Start, Periodicity, Plan Projection, Planning Type, Ticket Template, and Tasks up-to-date.
- 2**: Points to a row in the 'Upcoming Maintenance Tasks (18)' table where the 'State' is 'planned'.
- 3**: Points to a row in the 'Upcoming Maintenance Tasks (18)' table where the 'State' is 'projected'.
- 4**: Points to a ticket entry in the calendar view for September 4th, 2023.
- 5**: Points to a 'Projected Maintenance Reingung' entry in the calendar view for September 2nd, 2023.

Fig.: Example of an overview of a maintenance plan

Clicking on a ticket number within the calendar opens a ticket info card with a direct link to the maintenance ticket and asset to be maintained.

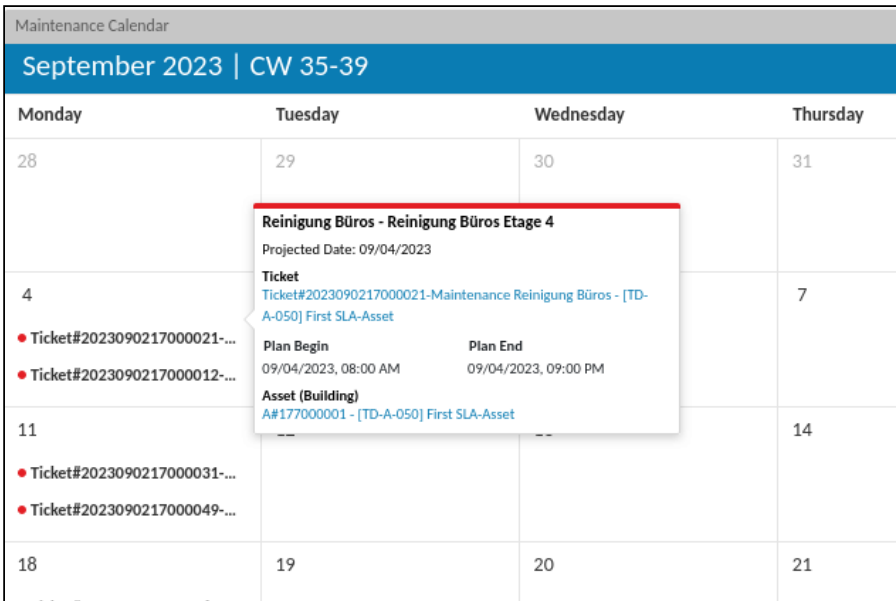


Fig.: Ticket info card for planned maintenance

11.2.3.4 Maintenance ticket in the zoom view

When you open the maintenance ticket, you will see the following maintenance-related information in the detailed view:

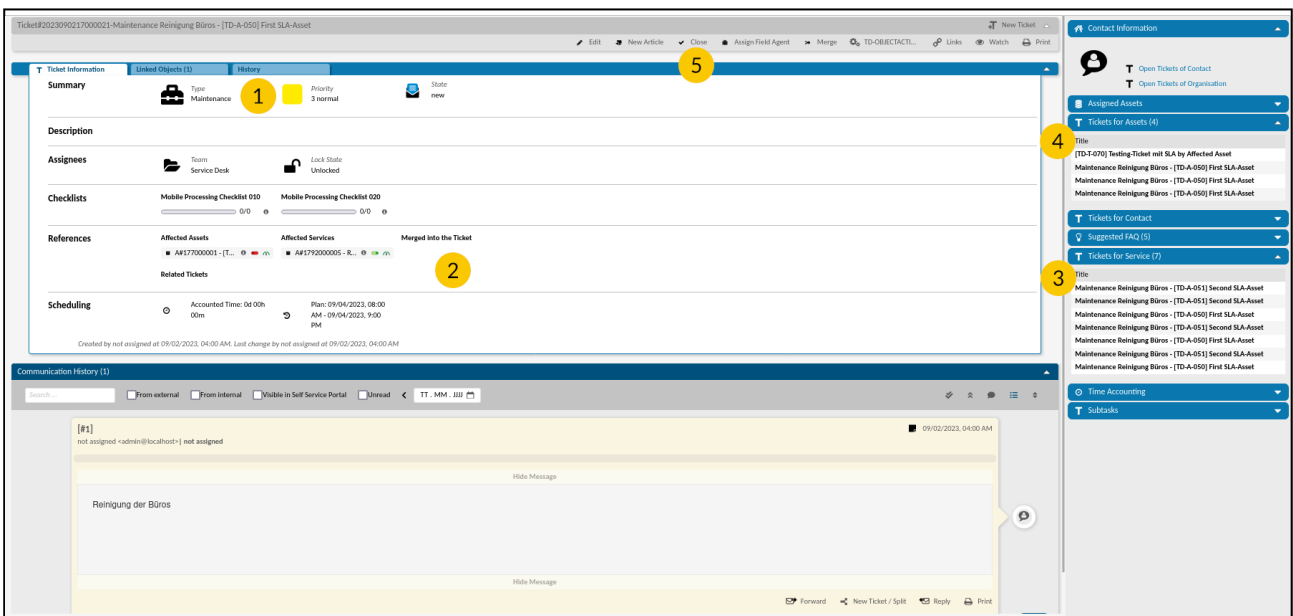
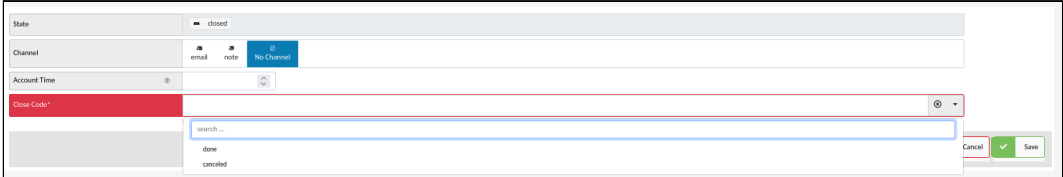


Fig.: Example of a detailed view of a maintenance ticket

1	<p>The summary shows that this is a ticket of the type "Maintenance". Priority and status settings can come from the ticket template used.</p>
2	<p>Checklists are also taken from the ticket template used, but are optional.</p> <p>The references to the asset and service concerned are based on the information from the creation of the maintenance plan.</p>
3	<p>The sidebar "Tickets for Service" shows further open tickets for the "Affected Services" mentioned in the references.</p>
4	<p>The sidebar "Tickets for Assets" shows further open tickets to the "Affected Assets" mentioned in the references.</p>
5	<p>The "Close ticket" button opens a dialogue with</p> <ul style="list-style-type: none"> • Selection of the channel through which the information on the ticket is sent/ documented <ul style="list-style-type: none"> • Email, opens additional selection "Visible in Customer Portal" • Note, opens additional selection "Visible in Customer Portal" • No channel • "Account time" option • Two completion codes available for selection, which are documented in the maintenance plan by a final "Save": <ul style="list-style-type: none"> • done • cancelled
	
<p>i If your maintenance plan is based on a completion-based planning type, the creation of the next maintenance ticket depends directly on the completed closed ticket.</p>	

11.2.3.5 Assets affected by maintenance in zoom view

If you open the asset affected by maintenance, you will see the following maintenance-related information in the detail view:

Fig.: Example of detailed view of an asset affected by maintenance

- | | |
|----------|---|
| 1 | In the "Maintenance Tasks" lane, you can see all planned and projected maintenance. Tasks for which tickets already exist can also be found in the "Linked Objects" tab. |
| 2 | Analogous to the calendar in the maintenance plan module, you can see planned tasks with the corresponding ticket number on the day to be executed. Clicking on a ticket also opens a ticket info card with direct links. |



3

Analogous to the calendar in the maintenance plan module, you can see projected tasks with a coloured background on the day they are to be carried out. Clicking here also opens a ticket info card with direct links.

11.3 The Order Management

A large number of comprehensive processes can be mapped with KIX, for example as part of order management. How this works and what options the software offers, we will show you here using the example of a procurement request for a headset and its processing.

11.3.1 1. Requirement notification

The first step is to report a requisition. The ticket for the procurement process is created with this requirement request. This can be done in KIX either

take place automatically, e.g. about

- an incoming email
 - by the customer in the Self Service Portal
 - or via a web form integrated in an intranet.
- be done manually by the agent creating the ticket himself when a call comes in.

In our example, the ticket is generated by the customer via the KIX Self Service Portal.

To do this, the applicant, Mr. Max Test, selects the "New procurement" ticket template in the self-service portal. This template was created in advance by the administrator in the admin module of KIX Pro to make it easier to record (see also "excursion"). The applicant enters all the required information in the template, such as his name, the object to be procured (headset) and the notification text explaining the need.

When the form is saved, the request is automatically sent as a ticket to the employees of the "Procurement" service team, who are responsible for requests of this type. They can view, check and edit the ticket in their team folder in the KIX agent portal. For these employees we use the term "service employee" below.

Digression

Set up an automatic reply

An automatic reply can be generated and sent when the request has been successfully received. The administrator sets up a corresponding **job** for this. Jobs are configured in the Admin module under *KIX > Automation > Jobs*. Since the response should be sent after a ticket has been created, "TicketCreate" is recommended as the executing event. Filters in the job can be used to restrict the conditions under which the response is sent. For example, only if a ticket is received by the "Procurement" team and the ticket subject says "Procurement request".

Create ticket template for the Self Service Portal

Administrators can create a **template** in the admin module of the KIX agent portal, which only contains the form fields required for the purpose of reporting a requirement (*Ticket > Templates* menu). You can configure the template so that it is available in the Self Service Portal, already contains the ticket subject "Procurement request" and takes care of the correct assignment to the "Procurement" team. In this way, processes can be standardized and effectively controlled.

Create quick functions

The service employee should be able to classify the ticket using a quick function and assign it to another employee. To do this, the administrator can create a **ticket action**. The action can be configured in such a way that only the necessary ticket parameters are displayed in the action for editing or are already filled in. Actions thus provide the functions for the process-oriented use of KIX. Actions are configured in the admin module of the KIX agent portal in the *Ticket > Actions* menu.

Create individual (device) statuses

Administrators can create individual asset statuses so that service employees can, for example, declare devices as "defective" or "depreciated". This is done in the admin module of the KIX agent portal under *Assets > General Catalog* by adding values to the *ITSM::ConfigItem::DeploymentState* class.

11.3.2 2. Processing of the ticket by the agent

The service employees see the incoming request as a ticket, for example in the home dashboard or in the ticket overview. You can click it to open the detail view of the ticket. This contains all relevant information about the ticket (the request) and the contact (applicant Max Text) in a clear form.

11.3.2.1 Verification of facts

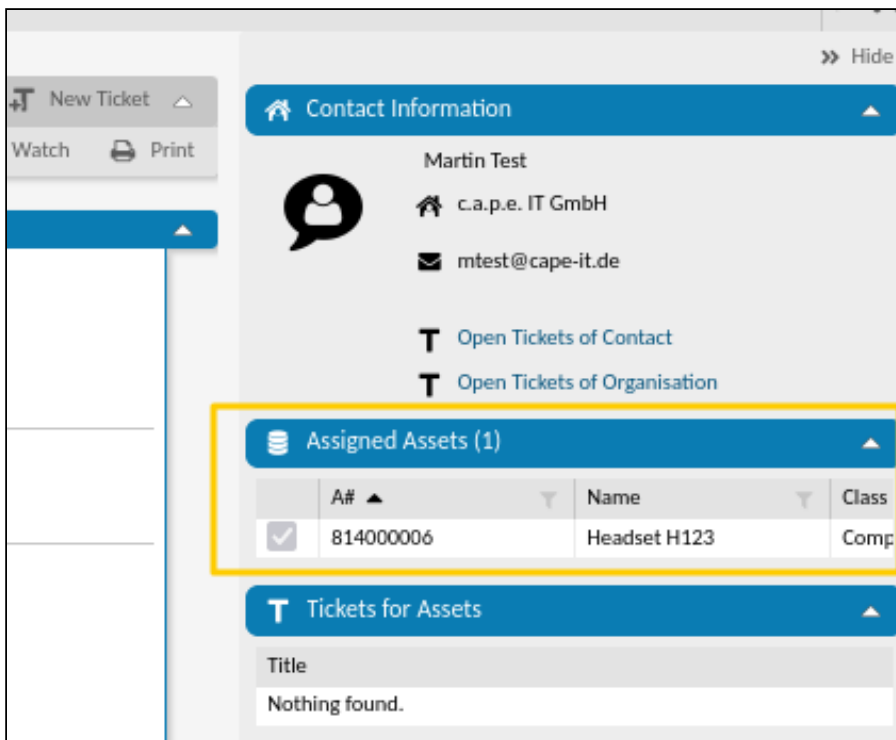


Fig.: Assigned assets in the sidebar of the ticket detail view

The detailed view of the ticket also contains an overview of the assets (e.g. devices) assigned to the contact in the sidebar - with direct access to the asset data. The service employee can see in the overview that Mr. Max Text already has a headset (see adjacent figure) and it could therefore be a replacement order or a second device.

To check this, the service employee can click on the headset in the overview and thus open its details. He can now view all of the headset's data, as this is stored in the KIX asset database (assets module). In addition, he can immediately change the status of the headset, for example to declare it as "defective", thus saving himself additional mouse clicks (see also digression).

11.3.2.2 Queries

To clarify the situation, the service employee still has a few questions for Mr. Max Test and asks for a photo of the old device. To do this, he creates a new article on the ticket.

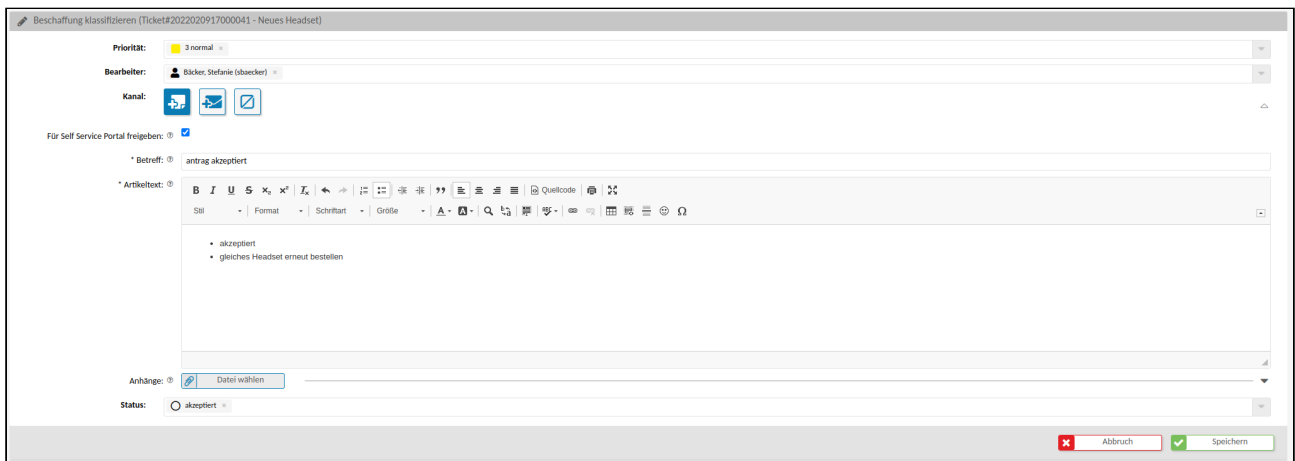
- To do this, he clicks on the "New article" button and a tab opens:
 - First, the service worker chooses the channel in which they want to send the reply: note (internal message) or email (external message). The corresponding fields then open. The service representative selects email.
 - He selects whether the following article should be displayed in the Self Service Portal by ticking the appropriate box.
 - In the Email form, he enters:
 - From ... who the email is sent from (is pre-filled by the system).
 - To ... who to send the email to. In our example, this is Max Test.
 - The subject of the email
 - The text of the email in the article content: The service employee asks Mr. Test to send him a photo of the defective headset and asks his open questions.
 - When all relevant fields have been filled in, he clicks on "Send". Internally, the email is stored on the ticket, externally it is sent to the entered recipient.

Mr. Max Test receives this email via his email program. The subject of the email contains the ticket number. She ensures that Mr. Test's reply mail, including the attached photos, arrives as an additional article on the ticket. KIX checks the incoming emails, sorts them into the appropriate teams using email filters and assigns them to an existing ticket based on the ticket number. This ensures that the entire process is fully mapped in one ticket. Email filters can be set up by the administrator in the admin module under *KIX > Communication > Email > Email filters*.

11.3.2.3 Classification

After it has been clarified that Mr. Max Test needs a new headset because his previous one is defective, the ticket can be classified. The administrator has already configured a ticket action "Classify procurement" in advance (see digression).

This ticket action is available as a button in the ticket header. After clicking on the action, a form opens with predefined input and selection options for classifying the ticket. The service employee now has the option of setting the priority of the ticket to "1-high", noting additional information about the process and assigning the ticket to his colleague, Ms. Stefanie Bäcker, since she is responsible for triggering the order. The ticket data is changed and the ticket is assigned to Ms. Bäcker when the action is saved.



Action	Description
Priority (Priorität)	Evaluation of the priority for the following steps
Owner (Bearbeiter)	Selection of the new owner
Article (Artikel)	Justification for further proceedings
State (Status)	Procurement request is: accepted / rejected

11.3.3 3. Trigger an order

After classifying the ticket and forwarding it to Ms. Bäcker, she sees the ticket in her dashboard. She can now take care of ordering a new headset for Mr. Test. To do this, you need the URL to the retailer's web shop and the login data. Such and much more information can be stored in the KIX internal FAQ. For example, the administrator creates an FAQ category "Logins". The administrator controls which service employee can view which FAQs via the user administration in the admin module.

With the information from the FAQ entry, Stefanie Bäcker now places the order and leaves all the relevant information about the purchase on the ticket. This is done by clicking on the "Edit" action. The form for your entry of a new article will then open. It stores all data and information and saves them.

She then sets the ticket status to "Waiting for a reminder" and enters the expected delivery date as the reminder time.

11.3.4 4. Register new device

When the expected delivery date is reached, Stefanie Bäcker is automatically informed by the KIX and can check whether the headset has arrived. Alternatively, she can ask the supplier again if there have been any delays in delivery.

As soon as the new headset has been successfully delivered, Ms. Bäcker registers the device as a new asset in the system. To do this, open the "New Asset" form and select the appropriate asset class. For the headset it is the "Hardware" class. In the form, only fields marked with a * are mandatory. All other fields offer the option of entering device-specific information if this is available and necessary. For the headset, Ms. Bäcker stores e.g. the purchase contract and the guarantee certificate.

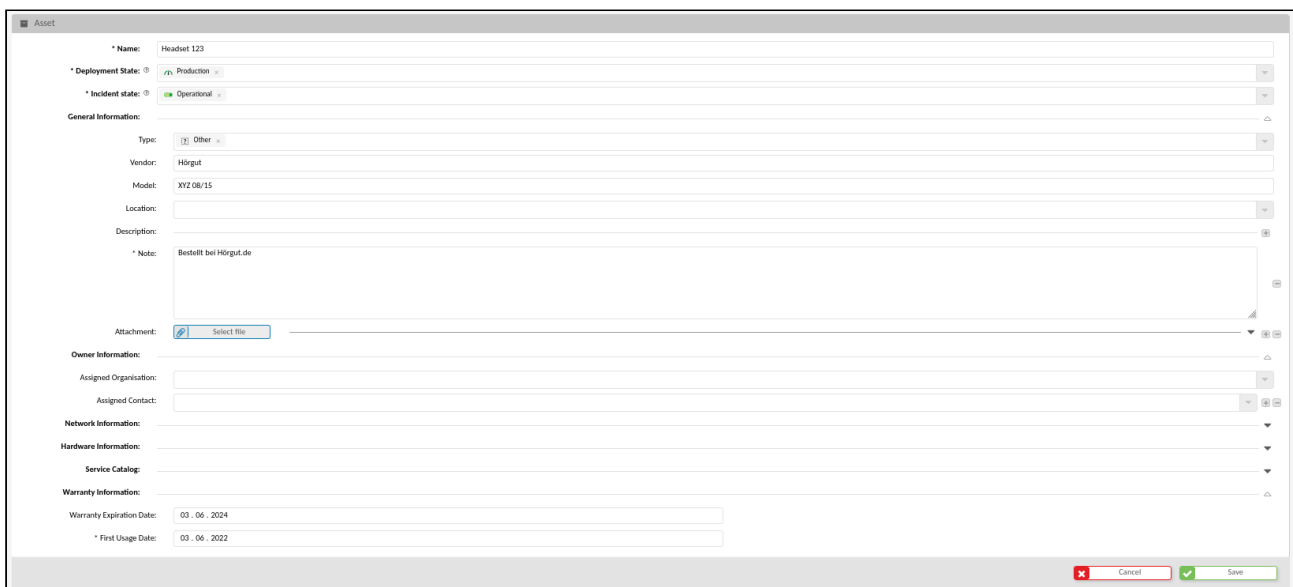


Fig.: "New Asset" form

The newly created asset is then linked to the procurement ticket. To do this, Ms. Bäcker clicks on the "Links" button in the detailed view of the asset, searches for the relevant procurement ticket and links the two objects with a "Relevant for" link.

11.3.5 5. Complete order

The final step is to hand over the headset to the applicant. To do this, Ms. Baker calls up the ticket again and links it to the new asset and creates a new item to inform Mr. Test that his headset has arrived and that he can pick it up from her.

To do this, she selects the "New article" action and uses pre-defined text modules in the form to fill out the article text in order to save time and effort.

In these text modules, the names of the people involved in the ticket can also be set automatically using the KIX placeholders. The text module is selected by entering ":" within the article text field. A selection menu



opens with text modules that match the keyword (part) entered. The relevant text module is selected by clicking on it.

If Mr. Test comes to Ms Bäcker to pick up his headset, she stores him in KIX as the new owner of the asset. To do this, she opens the ticket in KIX and can see and open the new asset via the link (by clicking on the asset). The asset detail view opens, on which Ms. Bäcker now selects the "Edit asset" action. In this form, she enters Mr. Test as the new owner (organization and contact) of the asset. Now the new headset can be handed over to Mr. Test and the signed handover protocol can be attached to the asset.

The procurement process is now complete and the ticket can be closed by clicking on "Close".

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 - the central documentation of all activities and changes in the IT such as due to executed maintenance activities or other service activities (e.g. medical device log book);
 - for compiling a knowledge database.
- for automating and simplifying general management processes, such as:
 - in service and technical customer service, for example in IT service (errors, changes, maintenance);
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- for monitoring purposes and calendar functions, such as:
 - for central IT services (network, email, data servers, SAP,...);
 - and for error and requirement notifications for the IT team, building services, medical device technology;
 - for the planning of regular maintenance works and reminders for replacing wear parts;
 - for the organisation of regular orders and planning the deployment of service technicians.

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