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1 Information on Using this Manual

To ensure transparency and ease of use, only settings and applications specific to KIX Pro are explained in this manual. Please refer to the KIX Start manual for all basic functions.

The manual for the agents and KIX-users can be found at https://docs.kixdesk.com. Here you will also find all other documentation on KIX versions 17 and 18.

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

To comprehension

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

1 https://docs/
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.

In this chapter you will find information on:

- SLA for Ticket (see page 4)
- SLA for Assets (see page 5)
- SLAs in Ticket Lists (see page 5)
- SLA in Ticket Zoom View (see page 6)
- SLA in Ticket Search (see page 8)

**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.
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.

Fig.: Visualization of SLA Attributes for Solution Time Criterion
Service Level Agreements (SLAs)

2.2 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.

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

1. Step: SLAs must be set for assets.
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.

2.3 SLAs in Ticket Lists

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

- Empty: No SLA set
- Green: No SLA criterion violated
- Orange: Reminder time for an SLA criterion reached
- Red: SLA criterion violated

Info

If a ticket is to be created without an SLA, the default SLA "No Escalation" can be set.
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)

<table>
<thead>
<tr>
<th>SLA Criteria</th>
<th>Prio</th>
<th>Ticket#</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>FirstResponse</td>
<td>i</td>
<td>2021G20817000456</td>
<td>[TD T-045] Testing Ticket</td>
</tr>
</tbody>
</table>

![Ticket with Violated SLA Criteria](image)

2.4 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 shown.
- If an SLA is set on the ticket and no criterion is violated, the lane has the same color as all the others.
- If an SLA is set on the ticket, and the reminder time has been reached for a criterion, the lane is orange.
- If an SLA is set on the ticket and a criterion is violated, the lane is red.
### Service Level Agreement (SLA) in Ticket Zoom View

![Service-Level-Agreement (SLA) Lane in Ticket Zoom View](image)

**SLA Criterion (Attribute)** | **Explanation**
--- | ---
SLA/Service Agreement | Name of SLA

**Reaction (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.
- **Fullfilment time**: Point at which the First Response was actually performed, meaning the agent created an article that is visible for the customer.
  - **Initial**: Time at which an item visible to the customer was created by the agent (see below).
- **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.
- **Deviation**: Time difference between the target time and fulfillment time in business minutes (without "night").
## SLA Criterion (Attribute) | Explanation
--- | ---
Violation | "Yes" or "No"; shows at a glance whether the obligation defined in the SLA has been fulfilled.

**Solution** | Refers to completing the ticket to which the SLA has been assigned.

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".

Fullfillment 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.

### 2.5 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:**

1. 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:
### SLA in Ticket Search

1. 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.

<table>
<thead>
<tr>
<th>Search attribute</th>
<th>Operator</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLA criterion</td>
<td>contained in</td>
<td>First Response; Solution</td>
</tr>
<tr>
<td>SLA criterion – violation</td>
<td>contained in</td>
<td>Yes</td>
</tr>
</tbody>
</table>

2. 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.

<table>
<thead>
<tr>
<th>Search attribute</th>
<th>Operator</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>contained in</td>
<td>Example Corp</td>
</tr>
<tr>
<td>SLA criterion</td>
<td>contained in</td>
<td>Reaktion (First Response)</td>
</tr>
<tr>
<td>SLA criterion – target time</td>
<td>vor (before)</td>
<td>&lt;desired date&gt;</td>
</tr>
</tbody>
</table>
3 Ticket - Add-On Functions

KIX Pro provides you with additional functions that you can use to modify tickets and their properties.

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).

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.
3.1 Actions

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

- Close Ticket (see page 11)
- Canceling Ticket Action (see page 12)

3.1.1 Close Ticket

The action is available in the ticket zoom view.

![Fig.: “Close” Ticket Action](image)

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

![Fig.: Edit Dialog to Close a Ticket](image)

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

<table>
<thead>
<tr>
<th>Input field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
<td>The ticket state is automatically set to &quot;closed&quot; using this action. If you would like to set a different ticket state, please select the action &quot;Edit&quot; in the ticket zoom view.</td>
</tr>
</tbody>
</table>
### 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.

### 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".

### 3.1.2 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: "Im Hintergrund wurden bereits Aktionen ausgeführt. (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.
3.2 Templates

3.2.1 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.

Working with Templates

To create a ticket using templates click 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.

The "Template" form field is located by default in the fourth position on the form for creating new tickets, after the fields for Contact and Organisation, below "Affected Asset". If you select a template, the input form may change: It is possible that form fields disappear or that certain ones are already pre-populated.

![Fig.: “New Ticket” Dialog with Selected “Critical Error” Template](image)

In the figure showing the "New Ticket" dialog, you can see that selecting the template has meant that the fields Type, Priority, Team, and State are no longer shown. In the example, these fields have default values that are the same for each critical error. The Service Agreement is displayed, but cannot be changed. "Critical" is pre-populated in the subject to facilitate filtering or searching for these tickets easily. In the figure for the ticket zoom view, you can see that values are also shown that were not available in the form.
Effect of a Template

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

<table>
<thead>
<tr>
<th>Impact</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>... fields in the New Ticket dialog may already be pre-populated.</td>
<td>The fields are shown on the form. The pre-populated value can be retained, modified, or supplemented.</td>
</tr>
<tr>
<td>... fields in the New Ticket dialog may be locked.</td>
<td>The fields are shown on the form, but cannot be changed.</td>
</tr>
<tr>
<td>... fields may be populated in the background.</td>
<td>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.</td>
</tr>
</tbody>
</table>
4 Liability Disclaimer KIX Pro

All text and graphics in this document have been prepared with special care. Nevertheless, no liability can be assumed for any possible technical and editorial errors or omissions in this document. This also applies to any incidental or consequential damage that potentially results from the provision, function, or use of this material.

Information regarding design, additions, and any errors there may be can be forwarded to our support team [https://forum.kixdesk.com](https://forum.kixdesk.com) at any time. We would be happy to take up and implement helpful suggestions and improvements.

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2 https://forum.kixdesk.com/
5 Purpose for which the use of KIX Pro is intended within a medical context

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

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

- purely for documentation purposes, such as:
  - the general management of equipment in the form of managing and cataloging device data (device meta data) such as names, IP addresses, series numbers, persons responsible, guarantee periods, service providers, operating documents, license information, cost centers, as well as the management/organisation of users, device instructions;
  - the central documentation of all activities and changes in the IT such as due to executed maintenance activities or other service activities (e.g. medical device log book);
  - for compiling a knowledge database.

- for automating and simplifying general management processes, such as:
  - in service and technical customer service, for example in IT service (errors, changes, maintenance);
  - in building services (errors, changes, cleaning) or medical device technology.

- for monitoring purposes and calendar functions, such as:
  - for central IT services (network, email, data servers, SAP,...);
  - and for error and requirement notifications for the IT team, building services, medical device technology;
  - for the planning of regular maintenance works and reminders for replacing wear parts;
  - for the organisation of regular orders and planning the deployment of service technicians.

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

KIX Pro may only be used in a medical context within the approved parameters mentioned above. c.a.p.e. IT GmbH assumes no liability for any use that goes beyond or deviates from the approved parameters.