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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 18.20.

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 such as “agents” or “users” 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 Toolbar - Advanced Functions

2.1 Personal Settings - User Token

The special functions, which are located in the toolbar at the top right of the screen, contain the "User Token" function in KIX Pro.

Fig.: Personal settings with "User Token" highlighted

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 you suspect 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.
3 Ticket – Add-On Functions

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

Service Level Agreements (SLAs)

You can set Service Level Agreements (SLAs) for tickets. An SLA contains different service time requirements that consist of two parts: First Response Time and Solution Time.

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.
3.1 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.

**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.
3.1.1 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.

Info

If a ticket is to be created without an SLA, the default SLA "No Escalation" can be set.
3.1.2 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.

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.
3.1.3 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

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](image)

3.1.4 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.
The following SLA criteria are shown:

<table>
<thead>
<tr>
<th>SLA Criterion</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLA/Service Agreement</td>
<td>Name of SLA</td>
</tr>
<tr>
<td>First Response</td>
<td></td>
</tr>
<tr>
<td>Start time</td>
<td>Starting time of the First Response Time. Corresponds to the point in time when the ticket was created.</td>
</tr>
<tr>
<td>Target time</td>
<td>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.</td>
</tr>
<tr>
<td>Fulfillment time</td>
<td>Point at which the First Response was actually performed, meaning the agent created an article that is visible for the customer.</td>
</tr>
<tr>
<td>Reminder</td>
<td>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.</td>
</tr>
<tr>
<td>Deviation service time</td>
<td>Absolute time difference between target time and fulfillment time (also includes &quot;overnight&quot; or &quot;weekend&quot;). For &quot;service time&quot; the term &quot;business time&quot; is also common.</td>
</tr>
<tr>
<td>Deviation</td>
<td>Time difference between the target time and fulfillment time in business minutes (without &quot;night&quot;).</td>
</tr>
<tr>
<td>SLA Criterion</td>
<td>Explanation</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Violation</td>
<td>&quot;Yes&quot; or &quot;No&quot;; shows at a glance whether the obligation defined in the SLA has been fulfilled.</td>
</tr>
<tr>
<td>Solution</td>
<td></td>
</tr>
<tr>
<td>Start time</td>
<td>Starting time of the First Response Time. Corresponds to the point in time when the ticket was created.</td>
</tr>
<tr>
<td>Target time</td>
<td>Target time of Solution Time: The ticket must be resolved by this point in time, i.e. it must have achieved the state &quot;closed&quot;.</td>
</tr>
<tr>
<td>Fulfillment time</td>
<td>Time at which the ticket was actually resolved, i.e. the state &quot;closed&quot; was saved for the ticket.</td>
</tr>
<tr>
<td>Reminder</td>
<td>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.</td>
</tr>
<tr>
<td>Deviation service time</td>
<td>Absolute time difference between target time and fulfillment time (also includes &quot;overnight&quot; or &quot;weekend&quot;). For &quot;service time&quot; the term &quot;business time&quot; is also common.</td>
</tr>
<tr>
<td>Deviation</td>
<td>Time difference between the target time and fulfillment time in business minutes (without &quot;night&quot;).</td>
</tr>
<tr>
<td>Violation</td>
<td>&quot;Yes&quot; or &quot;No&quot;; shows at a glance whether the obligation defined in the SLA has been fulfilled.</td>
</tr>
</tbody>
</table>
3.1.5 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**

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:

<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>First Response</td>
</tr>
<tr>
<td>SLA criterion - target time</td>
<td>before</td>
<td>&lt;desired date&gt;</td>
</tr>
</tbody>
</table>

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>
3.2 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.

3.2.1 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.
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.
### 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>
3.3 Other Actions

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

3.3.1 Close Ticket

The action is available in the ticket zoom view.

Fig.: "Close" Ticket Action
Click the action and a dialog opens to edit the ticket.

![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</td>
</tr>
<tr>
<td></td>
<td>would like to set a different ticket state, please select the action &quot;Edit&quot;</td>
</tr>
<tr>
<td></td>
<td>in the ticket zoom view.</td>
</tr>
<tr>
<td>Channel</td>
<td>With this action, choose whether you would like to create a note, send an</td>
</tr>
<tr>
<td></td>
<td>email, or not create an article. If you select channels &quot;Note&quot; or &quot;Email&quot;,</td>
</tr>
<tr>
<td></td>
<td>the input fields &quot;Subject&quot; and &quot;Article Text&quot; are mandatory fields.</td>
</tr>
<tr>
<td>Account Time</td>
<td>You can enter your accounted time in minutes.</td>
</tr>
<tr>
<td>Close Code</td>
<td>Select a close code from the list. This is subsequently shown in the ticket</td>
</tr>
<tr>
<td></td>
<td>zoom view. This field is a mandatory field.</td>
</tr>
</tbody>
</table>

To complete the action, finally click "Save".

### 3.3.2 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.
3.3.3 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.

![Merge dialog](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 hit 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 e-mail function opens. Here you can also choose whether the e-mail 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.

3.3.4 Split Ticket

In order to create a new ticket from an article of a source ticket or to extract subtasks and assign them to a respective team, there is the "Share ticket" function.
After clicking the button, a ticket dialog opens, type child ticket. 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. The article content and attachments (except "pending time") are transferred to the new ticket.

**Fig.: Position of the button "Share ticket"**

**Fig.: Example of the share ticket dialog**
Please note

Administrators have the option of configuring further individual actions, which are displayed as additional buttons in the system. These are available to the user under certain conditions, depending on the configuration and authorization.
3.4 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.

![Fig.: Field for Time Accounting in the "EditTicket" dialog](image)

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.

3.4.1 Budgets for Scheduling

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

![Fig.: Position of the "Planned Effort" tab](image)

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.
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.
3.5 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.

3.5.1 List view

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

3.5.2 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

### 3.5.3 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.

Fig.: Calendar view mode
3.5.4 Map view

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

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.
3.6 Sidebar "Assignend Assets"

The "Assignend 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.
4 Reporting - Advanced 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

4.1 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.

<table>
<thead>
<tr>
<th>Report Definition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset tickets closed in date range</td>
<td>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.</td>
</tr>
<tr>
<td>Asset tickets Created In Date Range</td>
<td>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.</td>
</tr>
<tr>
<td>Number Of Tickets Created Per Type And Organization</td>
<td>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.</td>
</tr>
<tr>
<td>Open asset tickets</td>
<td>List of open tickets with affected assets. The reporter can select ticket types, asset classes, and organizations.</td>
</tr>
</tbody>
</table>

4.2 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.

![Overlay with URL to Atom Feed](https://example.com/overlay.png)

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").

---

### 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")`
5 Liability Disclaimer for KIX Pro

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Information regarding design, additions, and any errors there may be can be forwarded to our support team (https://forum.kixdesk.com1) at any time. We would be happy to take up and implement helpful suggestions and improvements.

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1 https://forum.kixdesk.com/
6 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.