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1 Introduction

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

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

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

The administrator of the Self Service Portal can customize the user interface of the program. That is why when you log in to the KIX System, it may look different to the screenshots in this manual. This manual contains screenshots of the standard view only.
# Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>Person with advanced user rights who manages the system, assigns user rights, and enforces usage guidelines.</td>
</tr>
<tr>
<td>Agent</td>
<td>Owner/employee responsible for processing a request.</td>
</tr>
<tr>
<td>Article</td>
<td>Describes a work step within a process/ticket.</td>
</tr>
<tr>
<td>Assets</td>
<td>Any operating resource that has a function within the business processes, e.g. computers, software, servers, telephones, machines, vehicles, rooms, buildings, and contracts. Assets can also be referred to as: configuration item, config item, and CI.</td>
</tr>
<tr>
<td>CMDB</td>
<td>The Configuration Management Database is referred to as the Asset Database in KIX 18. It was developed for access to and management of assets.</td>
</tr>
<tr>
<td>Dialog</td>
<td>Separate window (overlay) with form fields or additional information.</td>
</tr>
<tr>
<td>Drag &amp; Drop</td>
<td>Computer function enabling you to click/select graphical elements (e.g. icons, passages in a text, etc.), drag them across the screen with the mouse, and drop them somewhere else.</td>
</tr>
<tr>
<td>FAQ</td>
<td>Compilation of information for frequently asked questions/frequently occurring problems.</td>
</tr>
<tr>
<td>Icon</td>
<td>Symbol, graphical illustration of an element or menu item.</td>
</tr>
<tr>
<td>Incident</td>
<td>Describes an incident or other issue relating to an IT service or asset</td>
</tr>
<tr>
<td>Channel</td>
<td>Determines the method of communication (e.g. email, note, etc.).</td>
</tr>
<tr>
<td>Service</td>
<td>Means a service to be performed.</td>
</tr>
<tr>
<td>Ticket</td>
<td>Refers to all communication and documentation steps when processing a request. Tickets can be documented in the form of inbound and outbound emails, documented calls, notes, or customer feedback sent via the web frontend.</td>
</tr>
<tr>
<td>Term</td>
<td>Explanation</td>
</tr>
<tr>
<td>-------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Widget</td>
<td>Term for small, separate windows in a program; a portmanteau of the words &quot;window&quot; and &quot;gadget&quot;.</td>
</tr>
</tbody>
</table>
2.1 General information

2.1.1 Reload & Direct URL

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

A direct link takes you to the view of a ticket, an asset or an FAQ entry.

2.1.2 Dynamic fields

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

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

Dynamic fields can contain the following values: text, date and time, checklists, selection options, link to the asset concerned.

2.1.3 Template structure

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

The KIX Self Service Portal is a browser-based service system. Open your browser and enter the respective URL, which you will have received from the portal operator. The login page will open.

Enter your username and password (which you will also have received from the portal operator) in the respective fields. Then click “Login”. Following successful authentication, you will have access to the system.
# 4 Home Dashboard

After logging in, you will automatically land on the "Home Dashboard" – the main user interface. Here is a snapshot of the individual elements:

<p>| | | | |</p>
<table>
<thead>
<tr>
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</tbody>
</table>

<p>|   | The Menu Bar |   | The menu bar maps out the structure of the system and the individual dashboards. When clicking an area, you will be taken to the dashboard for that area. |
|---|---|---|
|   | Special Features &amp; Settings |   | The first icon in the special features area is a check mark. This means that there is a connection to the server and the data in the portal is up to date. |
|   |   |   | In second position is &quot;Dark Mode&quot; – a design element. By clicking this button, the user interface will switch to black and gray tones. |
|   |   |   | In third position you will see the language set. Click here to decide the language in which you would prefer to use the application. |
|   |   |   | Your login name is in fourth position. Clicking here opens a window that provides quick access to your personal settings preferences. This is also where you will find the logout function. |
|   | News Area |   | This area is where you will find the latest news records. They are displayed with the title and a brief description of the content. Clicking opens the full news record. |
|   | Asset Widget |   | This widget shows how many assets there are in each incident state within your portal. |</p>
<table>
<thead>
<tr>
<th></th>
<th>Ticket Widget</th>
<th>This widget shows how many tickets there are in each incident state within your portal. By clicking the symbol within the widget, you will be taken directly to the form for creating a new ticket.</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>FAQ Widget</td>
<td>This widget shows how many FAQs are saved within your portal. The most recently modified FAQ is also shown as a direct link.</td>
</tr>
</tbody>
</table>
5 Tickets

This menu point contains the "Ticket Dashboard", in which all of the tickets that you created can be found.

Using the search function ☰, you can search through your tickets using keywords. You can also filter the ticket overview section by "open" and "closed" tickets.

Click on a ticket to access the ticket zoom view.

By clicking the ✫ symbol in the bottom right-hand side of the screen, you will be taken directly to the form for creating a new ticket.
5.1 Ticket Zoom View

This view contains all information relevant to the ticket.

1 Header

Next to the title, the ticket header contains information about priority level, date of creation, and state.

Below the header is an overview of all the articles associated with the ticket. Articles are any messages sent to the portal operator, as well as all associated communication and work steps executed to help resolve the ticket.

2 Search

Using the search function, you can search through the ticket using keywords.
3 Sorting Function

The articles for the ticket can be sorted according to the following categories:

- Sender type
- Channel
- Subject
- Number of attachments
- Creation date

As standard, the articles are sorted in ascending order by creation date.

4 Articles

By clicking the symbol, you can edit the articles that you created/sent, e.g. by adding further information or an attachment.

Information

Your admin can store several editing options within this function. After clicking the pen, several blue boxes appear.

For example, an action can be carried out using this form without creating an article in the KIX system. It is also possible to ask a question.
5.2 New Ticket

This menu point contains the ticket creation function, which enables you to send messages to the portal operator. Creating a ticket is like writing an email, but has the advantage that your message will arrive at the correct location with all the relevant information straight away.

The top section contains the dialog forms templates for Incident Report and Service Report. Click the respective area to select the template you want.

![New Ticket Form]

Complete the form as follows:

<table>
<thead>
<tr>
<th>Designation</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affected Asset</td>
<td>By clicking this field, you can access all of the saved assets. If needed, for example in the event of an incident notification, you can send the exact asset affected.</td>
</tr>
<tr>
<td>Subject</td>
<td>This field contains a short description of your concern.</td>
</tr>
<tr>
<td>Article Content</td>
<td>This field is where you should describe your concern in as much detail as possible.</td>
</tr>
<tr>
<td>Designation</td>
<td>Content</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Attachments</td>
<td>Here you have the option to add additional information, e.g. images, PDF files, etc.</td>
</tr>
</tbody>
</table>

At the end, click on "Send" to submit your request.
6 Assets

This menu point contains the "Asset Dashboard", where you will find all of the assets saved in your portal, sorted by class.

An asset is any operating resource that has a function within the business processes. These operating resources are classed as e.g. computers, software, servers, telephones, machines, vehicles, rooms or buildings. The incident state shows the operating condition that the device or operating resource is currently in. This creates an organized structure that makes it easier to find and edit operating resources.

Using the search function, you can search through your assets using keywords.

Click on an asset to access the asset zoom view.
6.1 Asset Zoom View

This view contains asset-related information:

- the name of the asset
- the class to which the asset is allocated
- the number under which the asset is saved in the database
- the current incident state
- further information, depending on configuration
7 FAQ

This menu point contains the "FAQ Dashboard", which functions as a knowledge database.

Using the search function ☰, you can search through the FAQ entries using keywords.

Click on an FAQ entry to access its zoom view.
7.1 FAQ Zoom View

This view contains information saved about the respective FAQ entry.

How to search in KIX 18?

Objects should be found in KIX 18.

The advanced search option is available by clicking the magnifier icon in the module menu, ticket dashboard or customer dashboard. It opens a dialog, containing different tabs to search for different objects.

In the first column, select from the list the attribute you want to search for. In the second column, select the search operator. In the third column, you can enter text. For some attributes, you can choose specific values from a dropdown list, for some you can enter free text.

If you search for Assets, please keep in mind:

If you select no or more than one asset class, only these attributes are available for search who are shared by those classes. The search only takes into account recent versions.

After clicking the „start search“ button, the hit list offers a first overview. Clicking a row directly leads you to the detail view of this object. Click the Button „Detailed Search Results“ to reach the search results page. In the content area, you can see all the search results. In the explorer widget, additional assigned objects are available.

Available search operators:

Equals

The value you are looking for is exactly the same as the entered value

Example: name of queue „sales“ can be found by entering „sales“

Begins with

The value you are looking for starts with exactly the same letters as the entered value

Example: ticket title „problem with meeting room printer“ can be found by entering „problem“
8 Personal Settings

In this area you can configure your settings preferences.

<table>
<thead>
<tr>
<th>Category</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Password</td>
<td>Here you can set a new password for accessing your KIX Self Service Portal. To do so, enter your old and new chosen password, and then re-enter your new password. Clicking the symbol enables you to see your password unencrypted. The change will not come into effect until you have submitted the form.</td>
</tr>
</tbody>
</table>

Please note

If you have forgotten your password, please contact the administrator of the portal operator. The administrator will be able to assign you a new password.

| Language        | Select the language in which you would prefer to use the application.                                                                       |

Please note

If you have forgotten your password, please contact the administrator of the portal operator. The administrator will be able to assign you a new password.
9 Liability Disclaimer for KIX Self Service Portal

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.

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1 https://forum.kixdesk.com/
10 Purpose for which the use of KIX Self Service Portal is intended within a medical context

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

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

- purely for documentation purposes, such as:
  - the general management of equipment in the form of managing and cataloging device data (device meta data) such as names, IP addresses, series numbers, persons responsible, guarantee periods, service providers, operating documents, license information, cost centers, as well as the management/organisation of users, device instructions;
  - the central documentation of all activities and changes in the IT such as due to executed maintenance activities or other service activities (e.g. medical device log book);
  - for compiling a knowledge database.
- for automating and simplifying general management processes, such as:
  - in service and technical customer service, for example in IT service (errors, changes, maintenance);
  - in building services (errors, changes, cleaning) or medical device technology.
- for monitoring purposes and calendar functions, such as:
  - for central IT services (network, email, data servers, SAP,…);
  - and for error and requirement notifications for the IT team, building services, medical device technology;
  - for the planning of regular maintenance works and reminders for replacing wear parts;
  - for the organisation of regular orders and planning the deployment of service technicians.

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

KIX Self Service Portal 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.