HelpMatics™

Service Management System

HelpMatics™

Administrator Manual

1 HelpMatics™ overview

1.1 Introduction

HelpMatics™ is a service management system for the IT Helpdesk and other service departments. This tool helps companies to efficiently organize incident and problem management and the associated support workflow.

In addition to ticket processing, HelpMatics™ offers many other functions such as documentation, information management and online reporting. Further features are its multi-client capability and the support of QM processes by an integrated knowledge management.

The special advantage of HelpMatics™ is its intuitive handling in any workflow, ergonomic front-ends, equal structure in all modules, comparatively easy implementation and administration, optimal transparency and continuous traceability in the support.

Our main objective during development was and is to combine maximum functionality with minimum operating effort. Many advantages will only manifest themselves during the daily work with HelpMatics™, which is confirmed again and again by our customers.

This documentation will acquaint you step by step with the use of HelpMatics™.

We hope that you will work efficiently with HelpMatics™.

1.2 Prerequisites

We guarantee you minimum implementation time. If you are already using HCL Domino/Notes as application in your company, you'll have the optimal prerequisites for immediate implementation of HelpMatics™. No additional licenses, no expensive extension of a Notes infrastructure, no additional server hardware are necessary. We take your existing groupware platform as basis and within a short time you will have an adequate service management system.

The implementation of HelpMatics™ is easy. If you are not using HCL Notes yet, we can supply you with a pre-tailored system (incl. server hardware on request) at a reasonable price.
It is also possible to use an Internet browser as HelpMaticsTM client.

1.3 HelpMatics™ standard and SMB version

HelpMatics™ is available in a standard version and in an SMB version with limited features.

The limitations of the SMB version are described in a separate document.

1.4 Using HelpMatics™ Enterprise

HelpMatics™ has been designed for global support of several sites and distributed teams.

This permits a differentiation in the replication of tickets, configurations and their effective control over various areas of support.

The standard version making use of the Enterprise setup is recommended for decentralized support at companies with several sites.

Instructions applying only to the use of the Enterprise features are highlighted in this manual as follows:

ENTERPRISE:

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1.5 HelpMatics™ CMS Enterprise

HelpMatics™ CMS Enterprise, a Configuration Management System of the HelpMatics™ Suite, uses a relational database management system (RDBMS)+ for data storage.

The features that are exclusively available in HelpMatics™ CMS Enterprise are marked as follows:

HELPMATICS™ CMS ENTERPRISE:

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1.6 Modules

This manual deals with the administration of the following modules, which can also be used separately:

- ServiceDesk (incl. HelpMatics™ Widgets)
- Knowledge
- Change
- Configuration Management (also refer to the separate HelpMatics™ CMS manual)

The following databases are important for the administration as well:

- Portal: Configuration of the web portals.
- Transfer: Control of company-wide data transmission between the modules in the Enterprise Setup.
- Admin: Recording of administrative data used by all modules.

You'll find information applying to all modules in chapter 6. Examples referring to a specific module are marked by parentheses around the module - e.g. (ServiceDesk). In the subsequent chapters, module-specific information is dealt with.

In the administration of HelpMatics™ ServiceDesk and HelpMatics™ Knowledge, the data and/or documents of both modules are displayed in views, categorized according to the respective module. In the administration of HelpMatics™ Change, only the administrative data available for the Change module is displayed. If you want to administrate the data of all modules at the same time, open the Admin module.

2 Installation

2.1 Client system requirements

- HCL Notes client 8.5.2 to 9.0, on all supported operating systems (MS Windows, Apple Macintosh)
  or: Web Browser (recommended: IE/Chrome/Firefox)
  or: MS Terminal Server client
- network connection to HCL Domino Server

2.2 Server system requirements

- HCL Domino server 8.5.3 FP2 with UpgradePack 1 to 9.0
- Every operating system supported by HCL Domino as server operating system

ENTERPRISE:
The COPYTODATABASE_NEW_UNID=1 parameter in the Notes.INI file of all servers concerned is a prerequisite for correct data exchange between distributed sites.

How to proceed:
There are various options for installing HelpMatics™. One of them is described in the following:

2.3 Installation

1. Copy the templates to the local Notes data directory and remove the write protection from the files.
2. Create new replica of the templates stored on the server in the Notes client (appropriate rights provided).
3. Sign the templates with an ID authorizing you to run agents without restrictions.
4. Create new databases using the templates stored on the server.

3 Access rights

3.1 Rights required for the installation

3.1.1 Access rights to the individual databases

Via the access control list (accessible via File > Database > Access) you regulate the access rights to HelpMatics™ databases. For this you require database access as Manager.

In the following chapters, the access rights settings for HelpMatics™ ServiceDesk, Knowledge Base, HelpMatics™ Change and Configuration Management are described.

Details of the additional databases Admin, Portal and Transfer are described at the end of chapter 3.

3.1.2 Clients

If you want to use HelpMatics™ with several clients, make the following settings in the access control list (ACL):

Client access: If you want to grant individual groups/persons access to data (e.g. users and tickets) of a specific client only, add these groups/persons to the ACL and assign only the role of the desired client and not the roles of the other clients.

Clients are created via the HelpMatics™ Administration, see chapter 4. In this process, the corresponding roles (company abbreviation) are automatically created in the ACL and are assigned to all persons/groups by default.

In the example given, a HM_1st-Level COC group was created in the Domino directory (NAB), added to the ACL, and rights restricted to the COC AG client were granted.

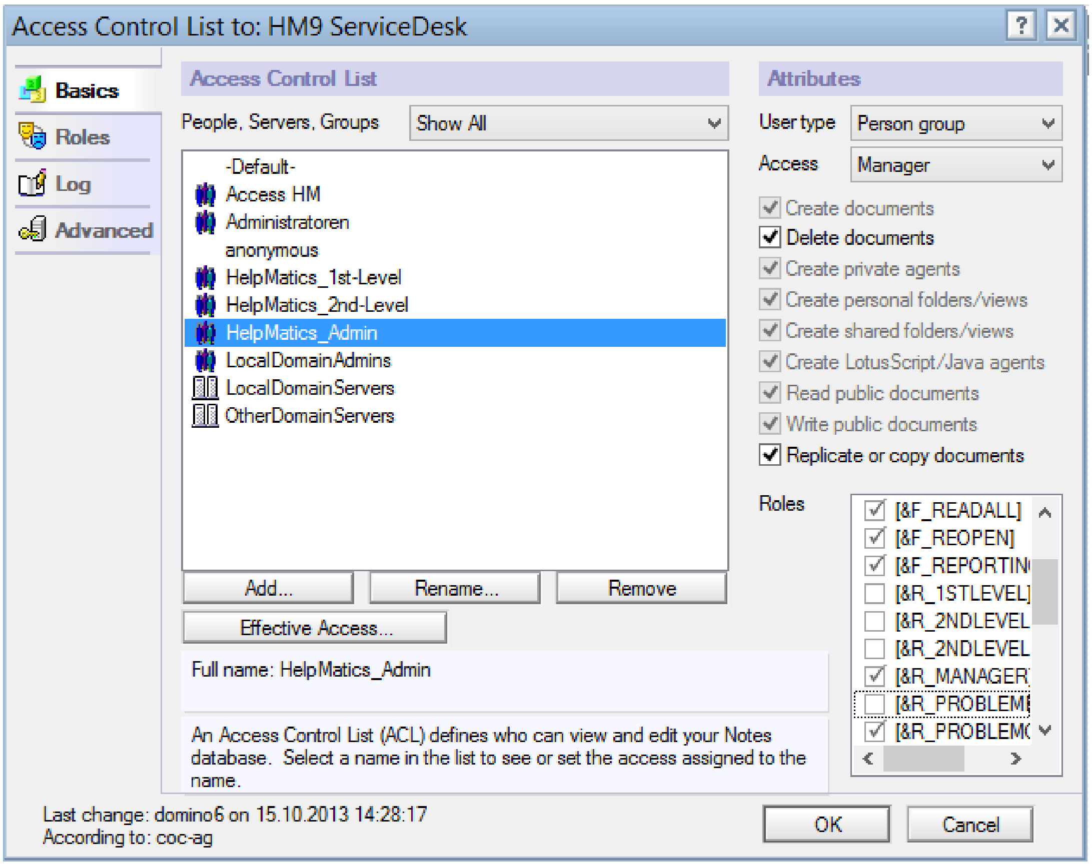


Fig. 1: Access control list (ACL)

This means that a member of the HM_1st-Level COC group can only see and edit users and tickets of the COC AG client (ServiceDesk module). This group cannot access data of another client.

In case of a configuration with more than one client, several clients can, however, be assigned to one group.

3.2 HelpMatics™ ServiceDesk rights

3.2.1 Grant access rights – Create Notes groups

At least 3 groups should be created in the Domino directory (NAB) (the descriptions may vary; further groups may be defined, e.g. HelpMatics_2nd-LevelCreate):

a. **HelpMatics_Admin:**

   HelpMatics™ administrators (HelpMatics™ managers): members of this group can make configuration settings in HelpMatics™.

b. **HelpMatics_1st-Level:**

   1st level team members that can create, edit and forward tickets.

c. **HelpMatics_2nd-Level:**

   2nd level team members that can edit and forward tickets. These team members cannot create new tickets.

It may be necessary to create a forth group.

HelpMatics_2nd-Level-Create:

2nd level team members that can create new tickets and edit them as well as edit and forward tickets assigned to them.
This group is assigned the 2nd-LevelCreate role instead of the 2nd-Level role.

3.2.2 Define access rights

The groups created have to be entered into the access control list (ACL) with the following rights:

a. HelpMatics_Admin:

User type:	Person Group
Access:	Manager or Editor not authorized to define new clients
Target group:	HelpMatics™ managers

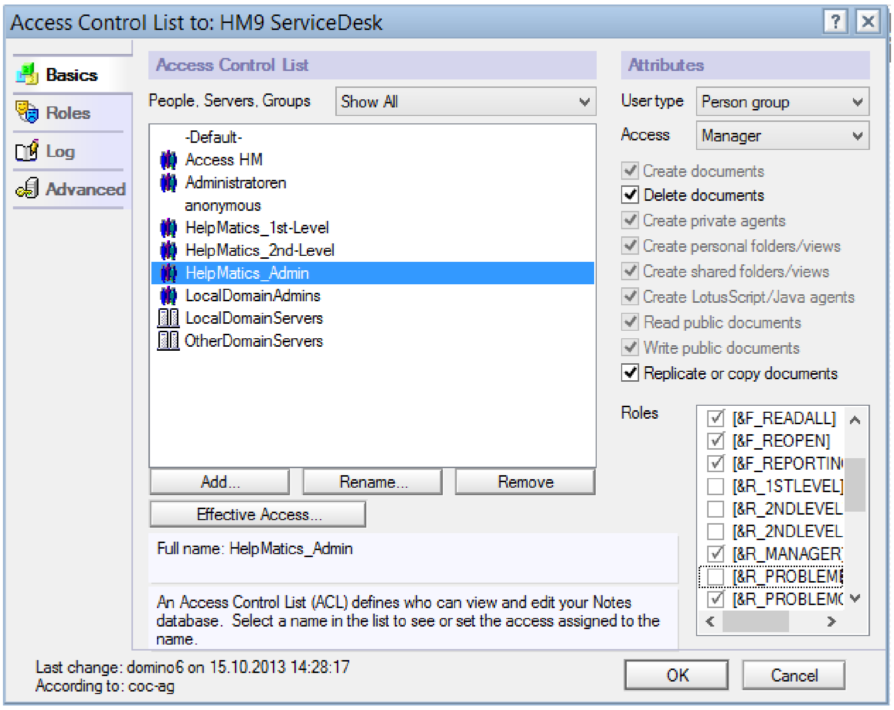


Fig. 2: ACL with Admin rights

b. HelpMatics 1st-Level

User type:	Person Group
Access:	Editor
Target group:	Helpdesk / servicedesk team members

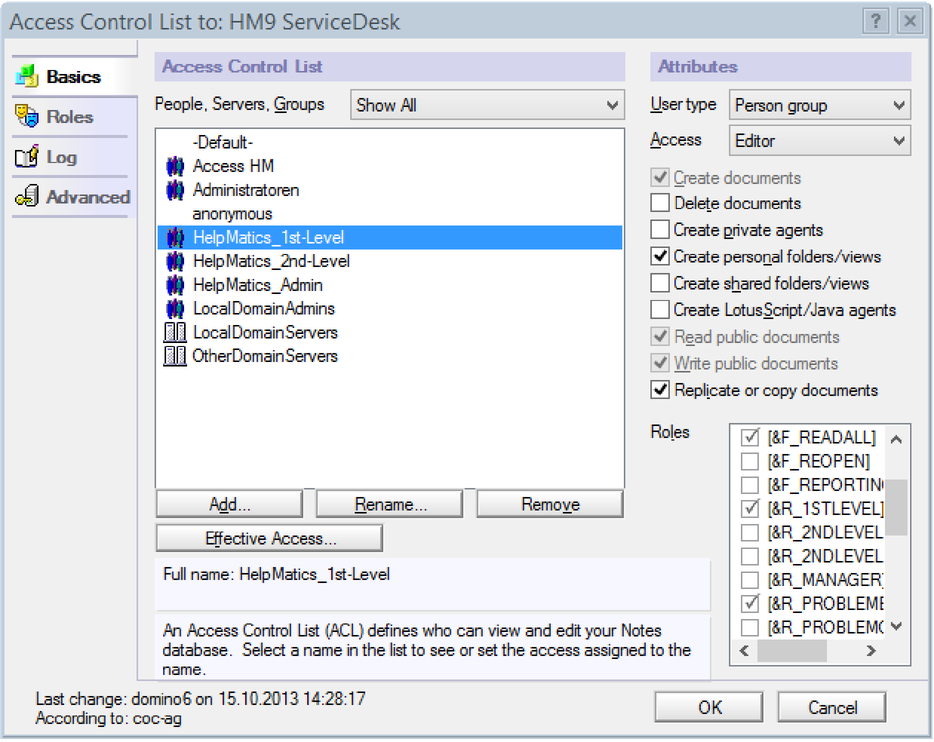


Fig. 3: ACL with 1st level rights

c. HelpMatics 2nd-Level

User type:	Person Group
Access:	Editor
Target group:	Members of 2nd/3rd level support (not authorized to create tickets)

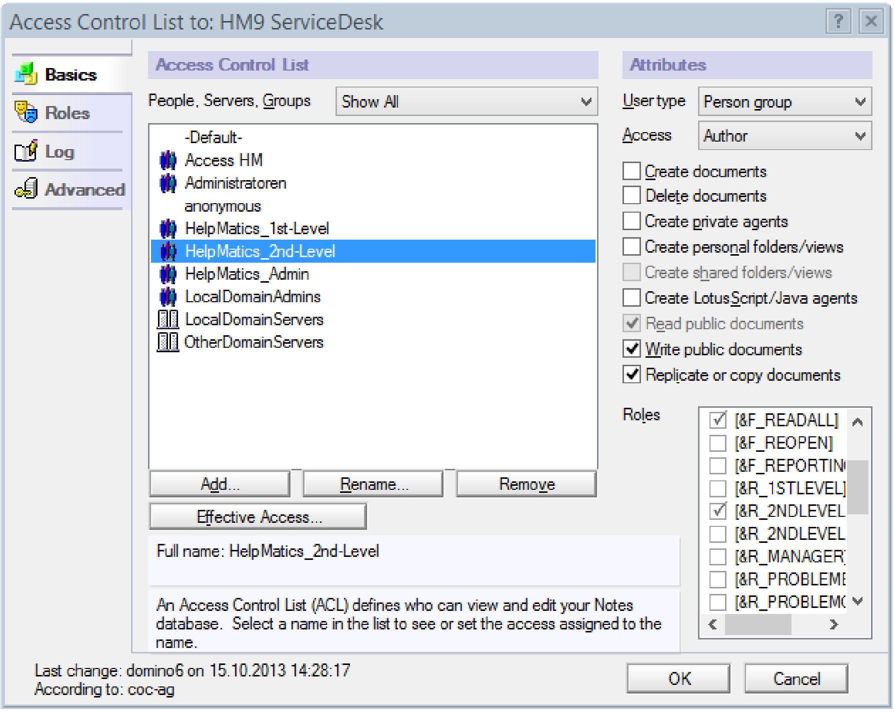


Fig. 4: ACL with 2nd level rights

d. HelpMatics 2nd-LevelCreate

User type:	Person Group
Access:	Editor
Target group:	Members of 2nd/3rd level support (authorized to create tickets)

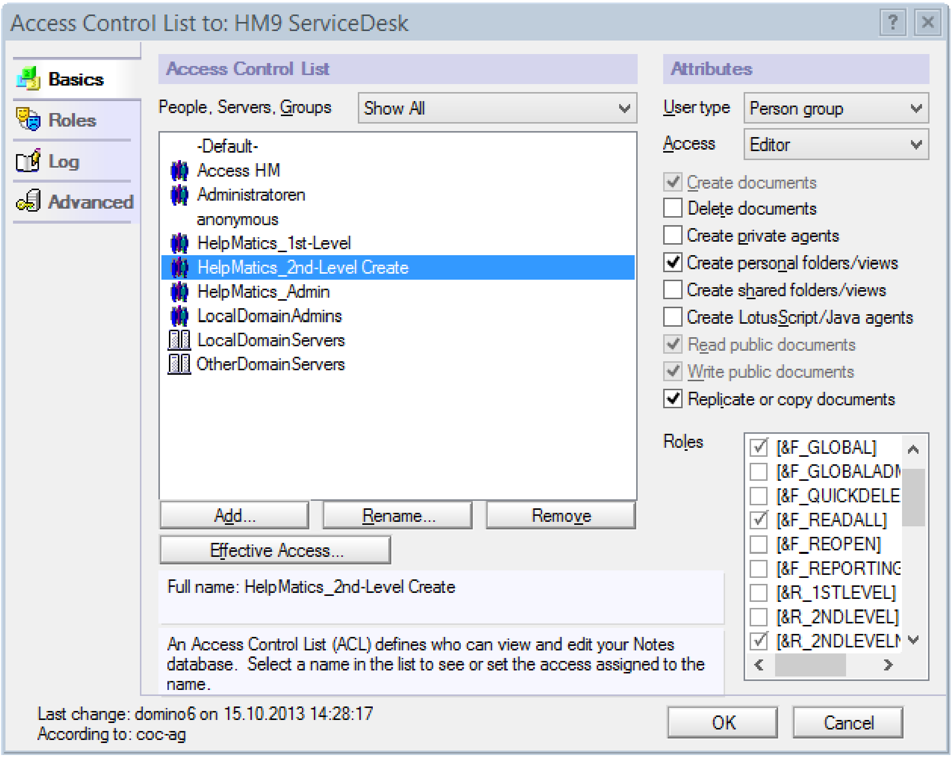


Fig. 5: ACL with extended 2nd level rights

e. "Default" entry

After adaptation of the ACL, the Default entry will be deprived of database access:

User type:	Not specified
Access:	No access

3.2.3 Roles

By default, the following roles are available. These roles have to be assigned to the relevant persons / groups (via File > Database > Access). Furthermore, the availability of the ServiceDesk module has to be activated in the process editor document (see chapter 4.9) .

Role	Description
[&R_MANAGER]	By default, these roles are only assigned to the HelpMatics Admin group since they permit access to all administrative settings (Administration menu).
[&F_REPORTING]	Usually, this role is also reserved for the HelpMatics Admin, but can also be assigned to any group or person. Access to Reporting is associated with this role.
[&R_1STLEVEL]	A role meant for 1^{st} level helpdesk or servicedesk members (assignment to HelpMatics 1^{ST}-Level group).
[&R_2NDLEVEL]	This role grants 2^{nd} level team members the rights required for ticket processing. These rights are the basis for editing tickets taken over or being assigned for processing. It is, however, not possible for the 2nd level team members to change priority or responsibility or set the status to closed.
[&R_2NDLEVELNEW]	Unlike staff with second level role, team members with this role can create tickets themselves. In these tickets (i.e. where they are the responsible persons) they can prioritize, change responsibility and set the status to closed.
[&F_REOPEN]	Closed tickets cannot be easily reprocessed. The owner of this role can reset closed tickets to work in progress. Recommended for HelpMatics™ managers and higher, possibly also for helpdesk/servicedesk members.
[<XXX>]	For each client (e.g. company) that has been created in HelpMatics™ a role is created using the company abbreviation (e.g. [COC] and [FIR] in the figure).
[&F_DELTICKETS]	This role allows deleting tickets. This also requires the deletion rights in Notes.
[&F_QUICKDELETE]	Optional role for managers. Please note: When deleting main documents, the respective reply documents will not be considered.
[&F_READALL]	Optional role. Allows access to all documents and eliminates the restriction to clients.
[&F_GLOBAL]	Only available in the Enterprise environment with several databases. To be assigned to all team members.
[&F_GLOBALADMIN]	Only available in the Enterprise environment with several databases. For HelpMatics™ managers having the right to define global categories.
[&R_PROBLEMOWNER]	For creating and editing problem tickets
[&R_PROBLEMEDIT]	For editing problem tickets. Does not include creating new problem tickets, closing problem tickets or changing priorities in problem tickets.

Roles with the prefix &R have a hierarchical structure, i.e. lower level rights are included in higher levels:

Level 4:	[&R_MANAGER]	[&R_MANAGER]
Level 3:	[&R_1STLEVEL]	[&R_PROBLEMOWNER]
Level 2:	[&R_2NDLEVELNEW]	[&R_PROBLEMEDIT]
Level 1:	[&R_2NDLEVEL]	

3.2.4 HelpMatics™ ServiceDesk – distributed sites (Enterprise)

There are two different HelpMatics™ configurations: One for the local user helpdesks of the different sites, the other for the central user helpdesk (database type to be set under Administration → Modules in the Enterprise tab).

The installation procedure required for using the HelpMatics™ Enterprise transfer mechanism between several HelpMatics™ databases is described in the following (applies to Enterprise environment only):

ENTERPRISE:

To extend your HelpMatics system by an additional site database, proceed as follows (connection of a local helpdesk site):

1. HelpMatics™

Create new databases on the local user helpdesk server using the HelpMatics ServiceDesk and HelpMatics Admin templates.

Make the requested settings under Administration > Modules. (There is only one central database, but there are various local databases).This procedure is to be performed for all replica!

   a. Create a new client in the database viaAdministration > Clients, e.g. Sweden and enter a company abbreviation, e.g. SE

In this way the role [SE] will be automatically created in the ACL (SE representing the company abbreviation; here: Sweden).

Assign this role ([SE]) to all persons, groups and servers that are to have access to the documents of this client.

Make the necessary configuration settings (see paragraph 4).

2. Knowledge base
   a. Create a new database on the local user helpdesk server using the HelpMatics Knowledge template.
   b. Create a new client in the database viaAdministration > Clients,
   c. Assign this role [SE] to all persons, groups and servers that are to have access to the documents of this client.
   d. Make the requested settings via Administration > Modules.
   e. Make the necessary configuration settings (see paragraph 8).

3. Further modules
   a. Create new databases on the local user helpdesk server on the basis of the corresponding templates.
   b. Make the requested settings via Administration > Modules and complete the access control list.

4. Transfer
    a. Create a new replica of HelpMatics Transfer on the local user helpdesk server.
    b. Create a configuration document for the local database via the Configuration – New > Local database menu.

3.3 HelpMatics™ Knowledge rights

3.3.1 Access rights

All helpdesk team members require at least the Editor access level with the Create personal folders and views option.

By means of roles you specify if documents are visible, can be created or edited. The following roles can be assigned:

Role	Description
[&R_KBMANAGER]	Knowledge Manager: Can edit all knowledge documents for which he/she has the client role or that are free to all clients The Delete documents option should only be active for users having the manager role.
[&R_EXPERT]	Expert: Can edit knowledge documents assigned to him/her (also see 8.1)
[&R_MANAGER]	Administrator: Can edit experts, expert groups, categories ... and the configuration.
[&R_CREATOR]	Creator of documents: Can create new FAQ and solution documents. These are integrated into the editorial workflow.
[&F_REPORTING]	Access to Reporting is associated with this role.
[_<xyz>]	Freely definable user roles, such as [_User], [_Support] for which knowledge documents can be released for reading, start with an underscore. In order to make FAQ documents available to all persons via a portal, the Anonymous entry with Author access level and the desired user and client roles is added to the ACL. Please note: When editorial workflow is activated, Default must be set to No Access. If all employees are to get reading rights via the Notes client, a corresponding group must be entered into the ACL.
[<XXX>]	Client roles as required (as created under Administration – Clients).
[&F_READALL]	Optional role. Allows access to all documents and eliminates the restriction to clients.

Roles with the prefix &R have a hierarchical structure, i.e. lower level rights are included in higher levels:

Level 4:	[&R_MANAGER]
Level 3:	[&R_KBMANAGER]
Level 2:	[&R_EXPERT]
Level 1:	[&R_CREATOR]

Generally the Knowledge user requires the appropriate client role and one of the user roles which the document was released for in order to have access to a document. An agent updates the corresponding reader field. If the document has been released for all clients, one of the user roles which the document was released for is sufficient.

3.3.2 Process editor

3.3.2.1 Expert:

All users stored as process editors can be used as experts for individual documents and for categories ([_Expert] role must be assigned in the ACL).

On request (by activating Newsletter for ExpertYes/No in the process editor document), experts will daily receive an e-mail about newly assigned documents.

Process editors the Newsletter for Knowledge Manager option is activated for will receive an e-mail about new or checked documents.

Every expert will find the documents assigned to him/her under Editing process > Expert (Own).

3.3.2.2 Expert group

Every group stored there can be used as expert group for individual documents and categories.

Role	Description
[&R_KBMANAGER]	Persons with this role can edit all documents and will therefore not be requested to take over documents as expert.
[&R_EXPERT]	Each member of the expert group can find the documents assigned to the group under Editing process -> Expert (Own). When clicking on Edit, persons with this role will be requested to take over the document as expert.

3.3.3 Client

A knowledge document can apply either to a certain client or to all clients.

Initially, documents from HelpMatics™ ServiceDesk are restricted to their original client.

This restriction can, however, be removed or changed by a manager or expert during the editing process.

Same applies to knowledge documents that have been newly created in the Knowledge Base. If the creator has been entered as process editor, the client will be transferred as defined in the process editor document. If not, the creator's roles will be examined: If exactly one client role is assigned to him/her, this client will be transferred to the knowledge document; otherwise, the document will be freely available to all clients at first, but can be restricted during editorial preparation before it is released.

With the Client - New button you can add new clients. For each client created in this way, a role will be entered using the abbreviation.

By double-clicking a client in the list you can edit his profile and provide it with an e-mail address (Notes-Info tab).

3.4 HelpMatics™ Change rights

3.4.1 Access rights

All persons that are to edit data require the Editor access level with the Create personal folders and views option. Furthermore, the availability of the ServiceDesk module has to be activated in the process editor document (see chapter 4.9) . The individual rights of the persons are controlled via roles:

Role	Description
[&R_MANAGER]	This role permits persons access to Administration
[&R_CHANGEMNGR]	Change managers can create RFCs, changes and releases and edit them and the associated tasks without any restrictions
[&R_DEMANDCREATE]	This role is required for submitting requests for change via the web portal. To convey this right to all persons, the entry Anonymous is to be added to the ACL, and this role to be assigned to it.
[&R_PROBLEMOWNER]	Problem owners can create new RFCs and changes as well as edit these documents. However, they do not have the right to change the status. Problem owners who create RFCs or changes from HelpMatics™ ServiceDesk need this role in this module as well.
[&R_TASKEDITOR]	This is the role task editors require. They can edit all task data with the exception of target expense and minimum task period.
[&R_1STLEVEL]	Helpdesk team members with this role can create standard changes.
[&F_REPORTING]	This role is required for accessing the reporting views.
[&F_PROFILE]	This role allows a person to edit the profile settings under Administration → Categories → Validation, even if the type is set to local under Administration → Modules → Enterprise. Otherwise these profile settings can only be edited in the database identified as central.
[&R_WTASKEDITOR]	This role is required for access to web tasks. Access as depositor with read and write access to public documents is sufficient
[&F_READALL]	Optional role. Allows access to all documents and eliminates the restriction to clients.
[&F_REOPEN]	Optional role. Reopening of RFCs, Changes and Releases
[&F_QUICKCHANGE]	Persons with this role can create quick changes. You require at least the [&R_1STLEVEL] role for later processing the changes you created yourself further To directly create quick changes based on a CI, this role must also be assigned in the CMS module (HelpMatics™ CMS Enterprise).

Roles with the prefix &R have a hierarchical structure, i.e. lower level rights are included in higher levels:

Level 6:	[&R_MANAGER]
Level 5:	[&R_CHANGEMNGR]
Level 4:	[&R_PROBLEMOWNER]
Level 3:	[&R_1STLEVEL]
Level 2:	[&R_TASKEDITOR]
Level 1:	[&R_WTASKEDITOR]

3.4.2 Configuration of task processing in the web

For task processing in the web, either access for registered Domino users or anonymous access can be configured.

Type 1: Only for registered users

Persons that are users registered in the Domino directory and have an Internet password should be added to a HMWebTaskEditor Notes user group.

Configuration of the access control list (ACL):

- The HMWEBTASKEDITOR user group gets DEPOSITOR access and the [&R_WTASKEDITOR] role.
- The ANONYMOUS ACL entry (if existing) does not get access

Type 2: Anonymous access

Persons that are not registered in the Domino directory get access via the Anonymous ACL entry.

Configuration of the access control list (ACL):

- The ANONYMOUS ACL entry gets DEPOSITOR access and the [&R_WTASKEDITOR] role.
- The HMWEBTASKEDITOR user group (if existing) does not get access

3.4.3 Configuration for submitting requests via the user portal

Submitting requests is configured under Administration-Portal-User portal (see chapt. 6.6.1). Authentication can be defined here:

- Standard authentication means that the authentication defined under the authentication tab is used. A login is required for submitting the requests and the requestor's data will be filled with the login data by default. No additional adaptation of the ACL is required

- Anonymous means that irrespective of the setting in the Authentication tab access to the request is possible without login. ACL item Anonymous does not receive access, can, however, read public documents.

3.5 HelpMatics™ Survey rights

3.5.1 Access rights

The assignment of roles to teams or persons controls the access of persons to different areas. The persons should be assigned the EDITOR access level.

The following roles are important for HelpMatics™ Survey:

Role	Description
[&R_MANAGER]	Persons with this role have access to the survey and administration areas as well as to the export of user e-mail addresses to the CMS.
[&F_REPORTING]	If someone is to have access to the Reporting area, he/she requires this role.
[&R_POLL]	The DEFAULT and ANONYMOUS entries of the access control list are assigned this role if the access level is Authors. This guarantees that every user can answer questionnaires without authentication.
[&F_READALL]	Optional role. Allows access to all documents and eliminates the restriction to clients.

3.6 HelpMatics™ Configuration Management rights

3.6.1 Access rights

The helpdesk staff and the users of HelpMatics™ Change require at least READER access level as well as the respective client roles or the [&R_READALL] role.

Important roles:

Role	Description
[&R_MANAGER]	Access to ADMINISTRATION includes [&R_1STLEVEL], [&R_2NDLEVELNEW] and [&R_PROBLEMOWNER] rights
[&R_1STLEVEL]	Creation of incident tickets, creation and editing of CIs
[&R_2NDLEVELNEW]	Creation of incident tickets
[&R_PROBLEMOWNER]	Creation of problem tickets

HELPMATICS™ CMS ENTERPRISE:

When you use HelpMatics™ CMS Enterprise the visibility/editability of the License number for software CIs field is controlled by means of a separate role.

Role	Description
[&F_LICENCE]	Accesses to the license No. field

The use of the authorized user portal requires that the right to READ PUBLIC DOCUMENTS be assigned to the -anonymous- entry.

3.7 Access rights to other databases

3.7.1 Access rights to Admin database

HelpMatics™ managers and administration servers are assigned Manager access and the [&R_MANAGER] role as well as the client roles.

All other HelpMatics™ users require Reader access, plus the right to read and write public documents as well as the necessary client roles.

Read and write public documents is required for the FastText widget. This allows users without Manager role to create private text modules.

The WRITE PUBLIC DOCUMENTS attribute is also required for sending e-mails from the web client.

For further details, refer to HelpMatics™ ServiceDesk.

3.7.2 Access rights to Portal database

The [&F_DEBUG] role shall only be granted to administrators/managers.

HelpMatics™ managers should be granted EDITOR access incl. delete rights. Alternatively, MANAGER access can be granted.

HelpMatics™ process editors require read access for using the web client.

Depending on how the authentication of the portal/portals is configured, different settings are possible for the ACL.

- Anonymous: No access, however reading and writing public documents possible
- User: Editor

3.7.3 Access rights to Transfer database

Database required exclusively for Enterprise use.

HelpMatics™ managers and administration servers are granted Manager access and the [&R_MANAGER] and [&F_ReadAll] roles.

4 HelpMatics™ database configuration

4.1 Database settings

The search function in the web client works with full-text index. For this reason full-text indexing should be provided for ServiceDesk, Knowledge and CMS databases.

The database setting DOCUMENT LOCKING is recommended for the ServiceDesk and Change modules. A background mechanism checks if document locking has to be removed. Single documents can be added to this mechanism and do not have to be unlocked manually.

4.2 Mail-In database

Both HelpMatics™ ServiceDesk and HelpMatics™ Change have their own Mail-In area. A separate Mail-In database has to be configured for each module.

The preferred mail format of the Mail-In database at the Domino server should be rich text. This guarantees a reliable transfer of the e-mail text into the ticket when a ticket is created in the web from the Mail-In.

4.3 Basic settings

Under ADMINISTRATION > MODULES, paths leading to other modules and URLs for web access (complete URL) are set and stored. Here, also agent settings can be accessed in order to save the date for the AUTOMATIC ESCALATION agent when, in case a ticket is escalated, a notification by mail is to be sent (ServiceDesk).

If desired, colored flagging for escalated tickets can be configured via the color settings button. For each run of the Automatic escalation agent, the escalation level reached is stored, if required; provided that Allow Locking Documents is activated in the database settings.

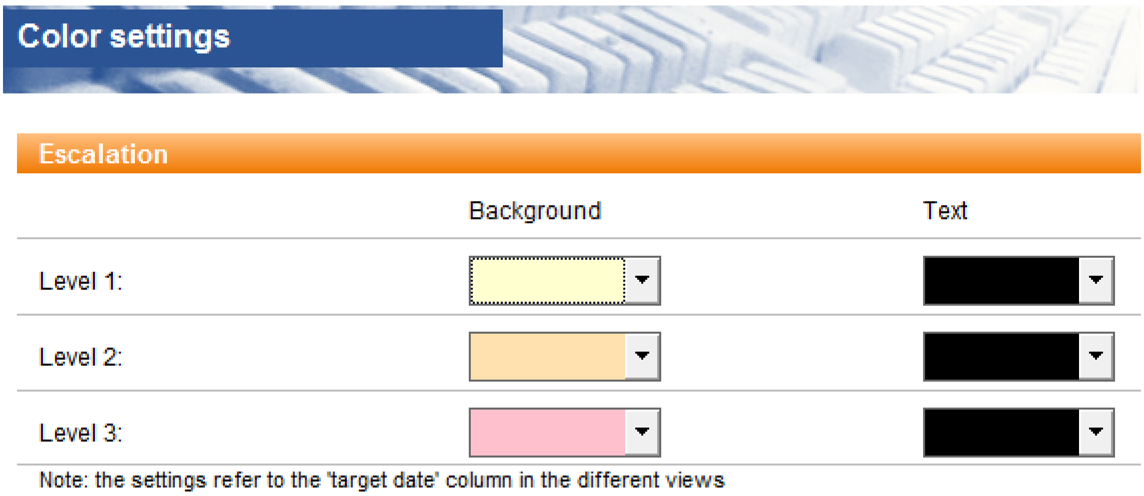


Fig. 6: Color settings for escalated tickets

In the integration tab tab, you configure if MS-Office products shall be available, e.g. for Excel export or printing.

4.4 Mail template

Under TEMPLATES > MAIL you can create the mail templates you require for the following purposes:

Optional (ServiceDesk): Mail to user when a ticket is created and/or a ticket is closed (the mail template to be used can be set for each client)

Mandatory (ServiceDesk): Notification for deadlines that have passed (the mail template to be used can be set for each client).

Optional: Forwarding notification (ServiceDesk) or notification of task assignment and status changes (Change) for process editors / teams (the mail template to be used can be set for each process editor or team)

On request (ServiceDesk): Notification in case of manual (hierarchical) escalation (the mail template to be used can be set for clients for each service level template).

On request (Change): Notifications concerning RFCs.

Mandatory (ServiceDesk): Notification in case of automatic escalation (the mail template to be used can be set for each service level template).

Mandatory (Change): Change of status information of RFCs / Changes (the mail template to be used can be set for each client).

Please note: The mail text can be formatted freely. Logos and attachments can be inserted. Avoid, however, colored formatting of the placeholders used as this may cause an incomplete structure of the mail text when the e-mail is created.

4.5 Service level template

Under Templates > Service Level the required service level templates are created (see chapter 7.3.1, Service level template). A service level template is required for each client. It can, however, also be used for several clients. If you want to activate service level monitoring for certain process teams, you require the appropriate service level templates for them as well.

4.6 Client

At least one client document has to be created under Clients > Definition (see paragraph 6.5.1). For the following reasons you should create several clients (also see chapters 3.1.2 and 4.6):

- Data security: Process editors are to have access to data (tickets, resources) of a certain client only.
- Evaluation: You require separate evaluations for different clients.
- SLAs: You want to display different service level agreements for various clients.

4.7 Category and type

The terms to be used for categorizing tickets, RFCs, Changes and Knowledge solutions are to be provided (see chapters 6.3, 7.2, 8.3 and 9.4).

4.8 Resources

User and configuration item data can be created manually for each client under RESOURCES > USER and RESOURCES > CONFIG. ITEM, respectively. For this, select the client in the COMPANY tab (ServiceDesk).

Usually, data from external data sources that is imported and updated per agent at night is used as well.

4.9 Process editors and process teams

Create the process editors first (see chapter 6.1). These are all 1st and 2nd level team members (ServiceDesk), experts and knowledge managers (Knowledge) as well as task editors, change managers and other responsible persons (Change). One person may perform different tasks in different modules. The availability in the individual modules can be set.

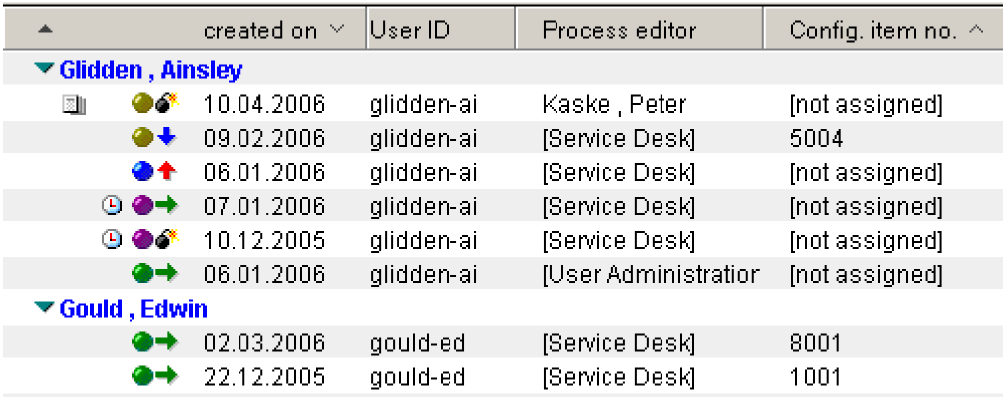
Then create the process teams and select the process editors for each team (see chapter 0).

5 Icons in the views

Icons play an important role in the overview displays of HelpMatics™ since they show information in a compressed way. Thus, clarity of representation and reading rate are increased.

In order to work efficiently with HelpMatics™, you should first memorize the mostly self-explaining icons. The following tables explain the icons used as well as their meaning.

Example:



created on	User ID	Process editor	Config. item no.
Glidden , Ainsley			
10.04.2006	glidden-ai	Kaske , Peter	[not assigned]
09.02.2006	glidden-ai	[Service Desk]	5004
06.01.2006	glidden-ai	[Service Desk]	[not assigned]
07.01.2006	glidden-ai	[Service Desk]	[not assigned]
10.12.2005	glidden-ai	[Service Desk]	[not assigned]
06.01.2006	glidden-ai	[User Administratior	[not assigned]
Gould , Edwin			
02.03.2006	gould-ed	[Service Desk]	8001
22.12.2005	gould-ed	[Service Desk]	1001

Fig. 7: Icons in the views

5.1 HelpMatics™ ServiceDesk

5.1.1 Priority

The priorities are transferred according to the settings under Administration > Clients > Definition.

Priority	Icon	Meaning
Priority 1		Suggestion: asap
Priority 2		Suggestion: very high
Priority 3		Suggestion: high
Priority 4		Suggestion: Standard
Priority 5		Suggestion: low

5.1.2 Forwarding and returning tickets

Forward	Icon	Meaning
Workflow > Process editor Workflow > Process team	or	forward to process editor or process team
Workflow > Back to Process Owner		closed / user informed
Workflow > Back to Process Owner		closed / user not informed
Workflow > Back to Process Owner		further processing required
Workflow > Back to Process Owner		incorrect ticket assignment

Please note: (blue arrow) corresponds to the new icon in Notes 8

5.1.3 Automatic mail processing

Action	Icon	Meaning
Mail from Mail-In automatically attached to the ticket		E-mail attached to the ticket and process editor informed, if required.

5.1.4 Status

Status	Icon	Color
closed		green
work in progress		yellow
open		red
on hold		violet
assigned external		blue
scheduled		grey

5.1.5 Date

Date	Icon
phone: e.g. call-back date	
fax / mail: response by fax or e-mail	
on site: e.g. appointment with user	
reminder	

5.1.6 Ticket

Meaning	Icon
master ticket or master info	
sub-ticket	
problem ticket	PRO

5.2 HelpMatics™ Knowledge

Meaning	Icon
FAQ document	
Document relevance. Depending on the read count, use count, rating and up-to-dateness, the document is provided with 0 to 3 stars	

5.3 HelpMatics™ Change

5.3.1 Priority

Priority	Icon	Text
High priority		Suggestion: “high”
Normal priority		Suggestion: “normal”
Low priority		Suggestion: “low”

5.3.2 Status

Icon	Color	Status/RFC	Status/Change	Status/Task
	red	rejected	rejected	closed (system)
	green	authorized	reviewed	-
	green	processing completed	processing completed	closed
	yellow	processing: active	processing: active	work in progress
	red	new	new	open
	violet	processing: on hold	processing: on hold	on hold
	gray	-	-	inactive
	red	-	-	on hold, trigger for a workflow interruption

6 Administration of HelpMatics™ - General

6.1 Process editor

This view displays a list of all persons working with HelpMatics™:

- Helpdesk team members (ServiceDesk)
- Experts and knowledge managers (Knowledge)
- Task editors, change managers, executors … (Change)

With the PROCESS EDITOR - NEW button you can add a new process editor. Every person working with HelpMatics™ has to be entered there along with the modules available to him/her. Via the ADDRESS BOOK button you can transfer the process editor's data from a Notes address book.

With a double-click on a process editor in the list, you can edit his/her profile.

For information on how to automatically create/synchronize process editor data refer to chapt. 11.2.

6.1.1 General data tab

- The spelling of first name and last name must correspond to the entries of the Notes address book, with the contents of the MIDDLE INITIAL field being suffixed to the first name. Process editor names consisting of more than 38 characters will be displayed with only 38 characters in the processor list of the documents for the sake of clarity.
- The process editor's initials may comprise 2 or 3 digits and are used for generating ticket ID, RFC ID and Change ID (<client>-<time stamp>-<process editor's initials>).
- Via the client of the process editor, client-specific information can be retrieved, e.g. address of sender, if the mail template used is configured accordingly. Moreover, process editors will only be displayed to users with appropriate client role (multi-client capability).

ENTERPRISE:

Here, the client has the following additional function: If a ticket is forwarded to a process editor whose client has not been defined as a role in the current database access control list, the availability in the ticket is to be set at least to CENTRAL to ensure the data exchange.

It additionally includes the Availability item to specify the databases in which the process editor shall be available. LOCAL (in the current database only), CENTRAL (in the current and the global databases) and GLOBAL (in all databases).

Please note:
The GLOBAL setting cannot be undone (except by deleting and newly creating a data record).

- Notifications concerning e.g. tickets directly assigned to the process editor (ServiceDesk), knowledge newsletters (Knowledge) and information on task assignment or changes of status (Change) will be sent to the e-mail address. It can moreover be used as address of sender e.g. for sending an e-mail to the user if the mail template used has been configured accordingly (also see 6.4).
- There is the option of storing a sender address. This is preferred to the use of the e-mail address if a mail template with Current Process Editor option is used as sender address.
- The e-mails can be sent via Outlook or HCL Notes. This applies to both mails that are generated in the ticket via the MAIL button and mails that are automatically generated when the ticket is forwarded to another process editor/team. If the e-mails are to be sent via the Domino server, select HCL Notes. If the local Outlook client is to be used for sending the e-mails, select Outlook.
- Calendar entries can be made in the Outlook calendar or in the Notes calendar. This refers to the transfer of dates set in tickets.

6.1.2 ServiceDesk tab

- Service level monitoring can be switched on or off. If service level monitoring shall be activated for the process editor, you can specify the corresponding service level template there. Please note that the settings of the assigned process team are primarily used. Only if the process team which is responsible for the ticket to be monitored cannot definitely be determined, will the settings of the process editor be used.
- E-mail notification when a ticket is assigned: Here you can activate e-mail notification of the process editor, select the mail template and specify which link to the ticket is to be attached. Explanation of the links:
    - NOTES MAIL: Link that only works within the Notes mail system.
    - Other E-Mail Clients: Creation of a file attachment leading directly to the task when it is opened (also works with other mail systems)
    - Web: Web link to the ticket (requires web access activation at the Domino server)
- Even if e-mail notification has not been activated for the process editor, escalation mails are sent to the specified e-mail address.

6.1.3 Knowledge tab

- Newsletter for Knowledge Managers: This setting refers to sending the daily newsletter to knowledge managers.
  Please note: Knowledge managers require the [_MANAGER] role in the Access Control List in order to be able to perform their function completely.
- Newsletter for Experts: This setting refers to sending the daily newsletter concerning newly assigned solutions and FAQs to experts.
  Please note: Experts require the [_EXPERT] role in the Access Control List in order to be able to perform their function completely.

6.1.4 Change tab

- E-mail notification when a task is assigned, when task processing is put on hold or canceled or when the target time has been exceeded: Here you can activate e-mail notification of the process editor, select the appropriate mail template and specify which link to the task is to be attached. Explanation of the links:
    - NOTES MAIL: Link that only works within the Notes mail system.
    - OTHER MAIL CLIENTS: Creation of a file attachment leading directly to the task when it is opened (also works with other mail systems)
    - Web: Creation of a web link for editing a task on the web

6.2 Process teams

In this view all process teams and their respective members entered under PROCESSORS are listed:

- Helpdesk team members (ServiceDesk, CMS)
- Experts and knowledge managers (Knowledge)
- Task editors, change managers, executors … (Change)

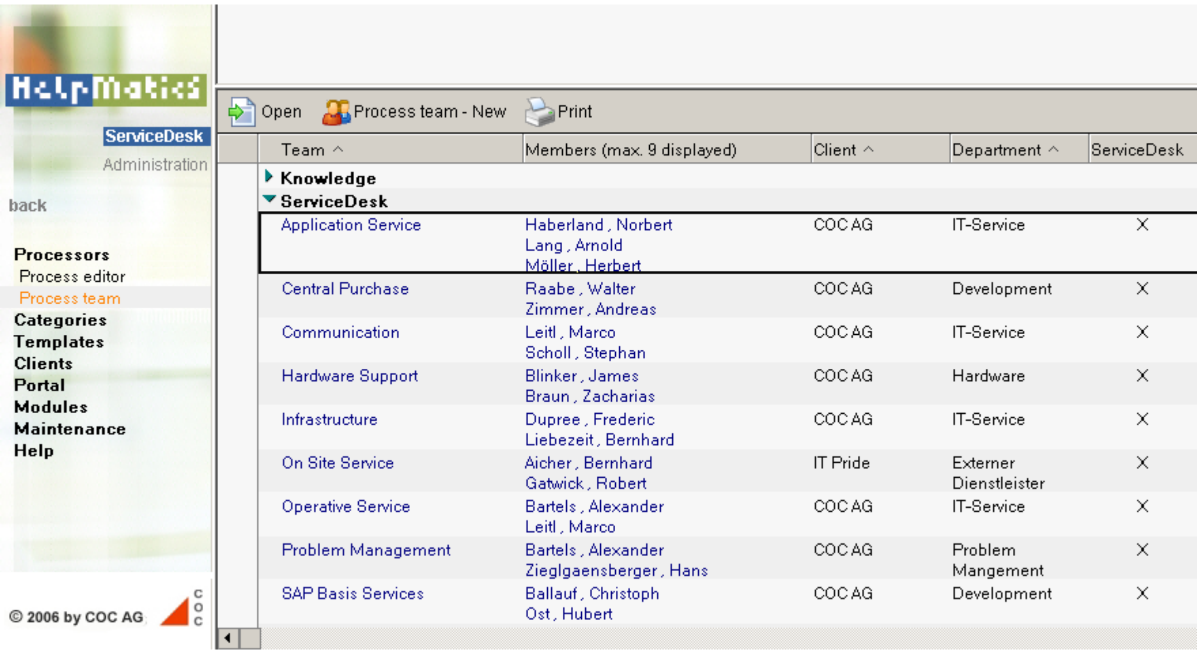


Fig. 8: Process teams

By clicking the Process Team - New button, you can create a new process team. Via the MEMBERS button you can select the members of the team.

By double-clicking the document you can edit a team.

For information on how to automatically create/synchronize process editor data refer to chapt. 11.2.

6.2.1 General data tab

- The name of the team must not consist of more than 38 characters.
- A team must be assigned to a client. This assignment is necessary for read access: Process teams will only be displayed to users with the appropriate client role (multi-client capability).
- Notifications concerning e.g. tickets that have been assigned to the process team will be sent to the e-mail address(es). Several e-mail addresses have to be separated by semicolons.
- The Department field is also part of the process editor document. It is used in some views to sort tickets by the department of the process team or process editor.
- Is a process team available for HelpMatics™ Change, a question will be asked upon changing the members as to if this change is to be transferred to active change documents. If a change document is blocked, no update will be made. Otherwise the update will be made immediately.

ENTERPRISE:

It additionally includes the Availability item to specify the databases in which the team shall be available. Local (in the current database only), Central (in the current and the global databases) and Global (in all databases).

PLEASE NOTE:
The Global setting cannot be undone (except by deleting and newly creating a data record).

6.2.2 ServiceDesk tab

- Service level monitoring can be switched on or off. If it is to be activated for the process team, you can specify the corresponding service level template there.
- The e-mail notification feature requires that the MAIL TEMPLATE to be used be selected and that the types of links to the ticket to be included in the notification e-mail be defined.
- Even if e-mail notification has not been activated for the team, escalation mails will be sent to the specified e-mail addresses.

6.2.3 Knowledge tab

- Newsletter for Experts: This setting refers to sending the daily newsletter concerning newly assigned solutions and FAQs to expert groups.

6.2.4 Change tab

- E-mail notification when a task is assigned and when new information on the task is available (also see 6.1.4).

HELPMATICS™ CMS ENTERPRISE:

6.2.5 CMS tab

For CIs there is a separate rights concept available via the HelpMatics™ process teams. For this purpose, all HelpMatics™ process editors have to be added to process teams.

This rights concept is a combination of access rights from the ACL (e.g. first-level rights) and rights to create/edit/delete CIs via the HelpMatics™ process team (e.g. for CI users of client xyz).

By default, only persons with the [&R_MANAGER] role may create, edit and delete CIs and establish relations or edit teams.

Persons or teams which the [&R_MANAGER] role has been assigned to via ACL are not affected by the rights concept on process team level.

Type: For each process team a separate configuration can be made as to which CI types this team may create/edit/delete. For deleting CI types, the right to delete documents has to be activated in the ACL.

Client: This right can be restricted by specifying a client.

<u>Relation</u>: Group documents may be saved depending on the respective rights on CIs.

Example: If rights have been assigned for User CI and COC client, user groups of the COC client can be edited and saved.

Additionally, CIs for which no rights have been assigned may be added to or removed from the group. No changes will be made to the original CI document.

Fig. 9: Process team rights in CMS

The rights of each process team will be added up.

Example:

Process editor X has been added to groups A and B.

Group A has rights on users and hardware of the CAT client

Group B has rights on software of the CCH client.

Consequently, process editor X may not create/edit/delete users of the CCH client.

6.3 Categories

6.3.1 Type

Here you find a list of defined types.

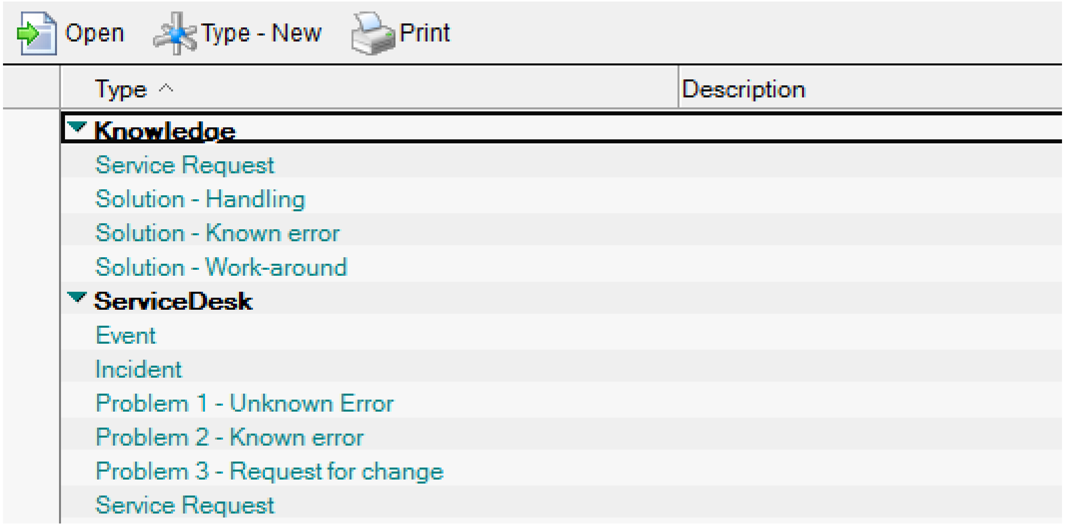


Fig. 10: Category type

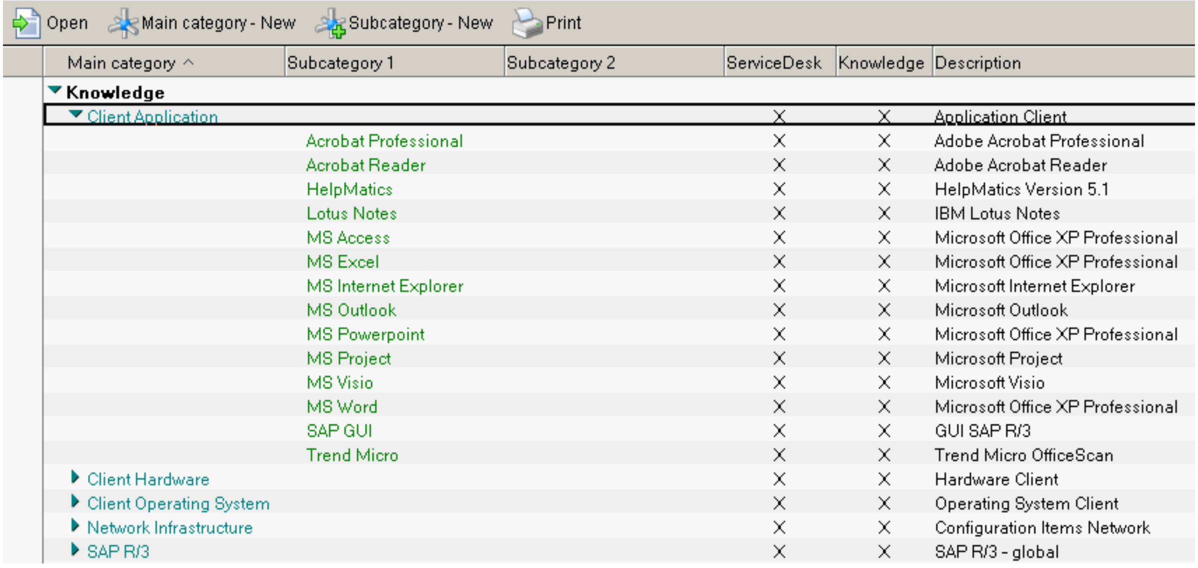
By using the TYPE - NEW button, you can add a new type; a list informs you about already existing types.
By means of the Use in process information you define the process times to apply to this type. You set these times in the service level template for clients in the Advanced configuration.

ENTERPRISE:

It additionally includes the availability item to specify the databases in which the type is to be available. Local (in the current DB only) and global (in all databases).

6.3.2 Main category

Choose short, precise terms for the main category.



Main category	Subcategory 1	Subcategory 2	ServiceDesk	Knowledge	Description
Knowledge					
Client Application			X	X	Application Client
	Acrobat Professional		X	X	Adobe Acrobat Professional
	Acrobat Reader		X	X	Adobe Acrobat Reader
	HelpMatics		X	X	HelpMatics Version 5.1
	Lotus Notes		X	X	IBM Lotus Notes
	MS Access		X	X	Microsoft Office XP Professional
	MS Excel		X	X	Microsoft Office XP Professional
	MS Internet Explorer		X	X	Microsoft Internet Explorer
	MS Outlook		X	X	Microsoft Outlook
	MS Powerpoint		X	X	Microsoft Office XP Professional
	MS Project		X	X	Microsoft Project
	MS Visio		X	X	Microsoft Visio
	MS Word		X	X	Microsoft Office XP Professional
	SAP GUI		X	X	GUI SAP R/3
	Trend Micro		X	X	Trend Micro OfficeScan
Client Hardware			X	X	Hardware Client
Client Operating System			X	X	Operating System Client
Network Infrastructure			X	X	Configuration Items Network
SAP R/3			X	X	SAP R/3 - global

Fig. 11: Main categories and Sub-categories

This view lists all main categories that your staff can use for roughly categorizing a problem.
With the Main Category - New button you can add a new main category.

If a category is not assigned to a client, it is displayed under DEFAULT SET and available to all clients for which no category set has been defined.

Note:
If a category set has been defined for a client, you should create ticket templates for this client as well, since, in this case, a sensible default category setting is only possible for client specific ticket templates. As regards portal ticket templates, it is essential to observe this procedure. Invalid configuration may cause failure in creating tickets from the portal!

Actions:

- Use the Main category – New button to add a new main category.
- To create a new subcategory, move the cursor to the superior category and click Subcategory – New on the action bar.
- Create copy: Client categories or default set categories can be copied to a different client. This makes creating category trees per client easier. In the copying process, all existing categories of the target client can be deleted.

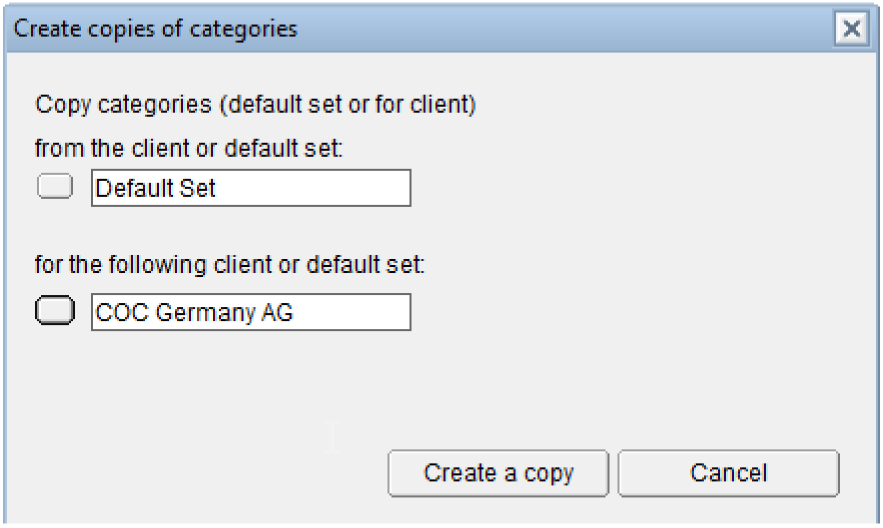


Figure 12: Copy feature for categories

With a double-click on a category in the list, you can edit it. In both cases a window appears which, in the edit mode, contains, among others, a list of already existing categories of the same level.

Changes to categories will be transferred to the subcategories.

A default process team can be assigned to a main category for ticket processing. The default process team will be passed on to the subordinate categories.

A subcategory can only be made available in a module if the superior category is available. If a superior category is not available in a module, its subcategories will not be available either.

HELPMATICS™ CMS ENTERPRISE:

You can assign one or several services to each category level. To do so, use the ASSIGN button.

When you select a category in the ticket, the more specific service is used.

Example:

Main category – no service stored

Subcategory 1 - Service A

Subcategory 2-1 – Service B

Subcategory 2-2 – no service stored

When you select subcategory 2-1, service B is used, when you select sub-category 2-2, service A is used.

If a service is assigned to a ticket template, this will be used in the ticket.

ENTERPRISE:

It additionally includes the Availability item to specify the databases in which the main category and its subcategories are to be available. Local (in the current DB only) and global (in all databases).

6.3.3 Subcategories 1 and 2

Your team members can use the subcategories to characterize a problem in greater detail.

To create a new subcategory, position the cursor to the superior category and click Subcategory – New in the action bar.

A subcategory inherits the default process team from the main category, or a default process team can be assigned to the subcategory for ticket processing.

The figure below shows the window for creating another subcategory 1, with Client Application being the main category.

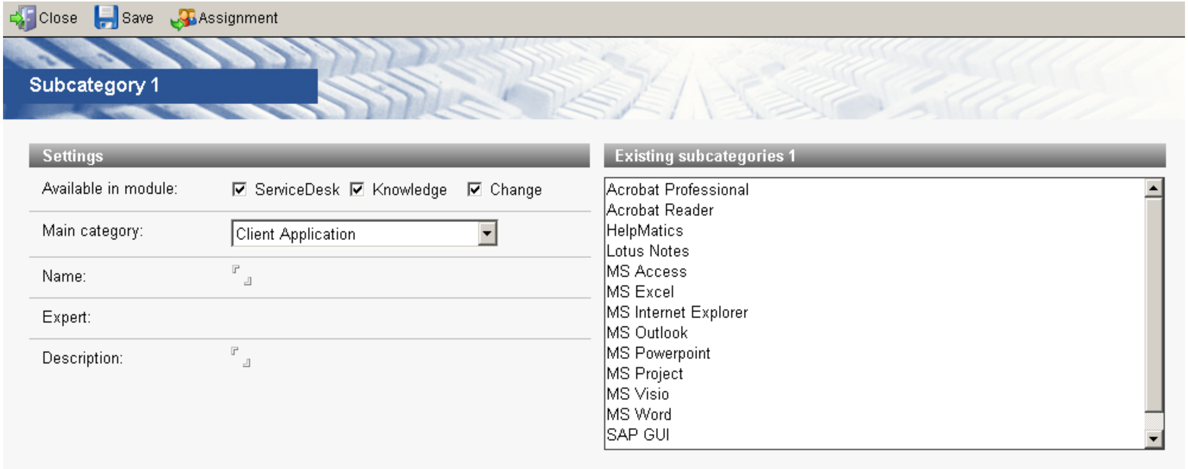


Fig. 13: Subcategory 1 window in edit mode

6.4 E-mail templates

Under Templates > E-Mail, templates for e-mails can be defined which can be used in the HelpMatics™ mail workflow (e.g. as e-mail to a user or an external service team member). After clicking the E-Mail action button, the e-mail templates that have been defined to be of Public type will be displayed for selection in the document window. If there is only one e-mail template, this will be used automatically.

E-mail templates of Administrative type can be assigned e.g. to process editors and process teams and thus be used for the transfer of information within e-mails. In this way you can assign e.g. a specially designed e-mail template to a process editor who want to be informed about new tickets by SMS. (For this, the e-mail function of the mobile phone must be activated and the e-mail address of the process editor be entered. Only the e-mail subject will be transmitted. The charges will be borne by the mobile phone owner). Further applications of administrative e-mail templates are process editor escalation and client escalation (service level template selected in the Monitoring tab).

With the E-Mail Template - New button you can add a new template. Define your e-mail template like this:

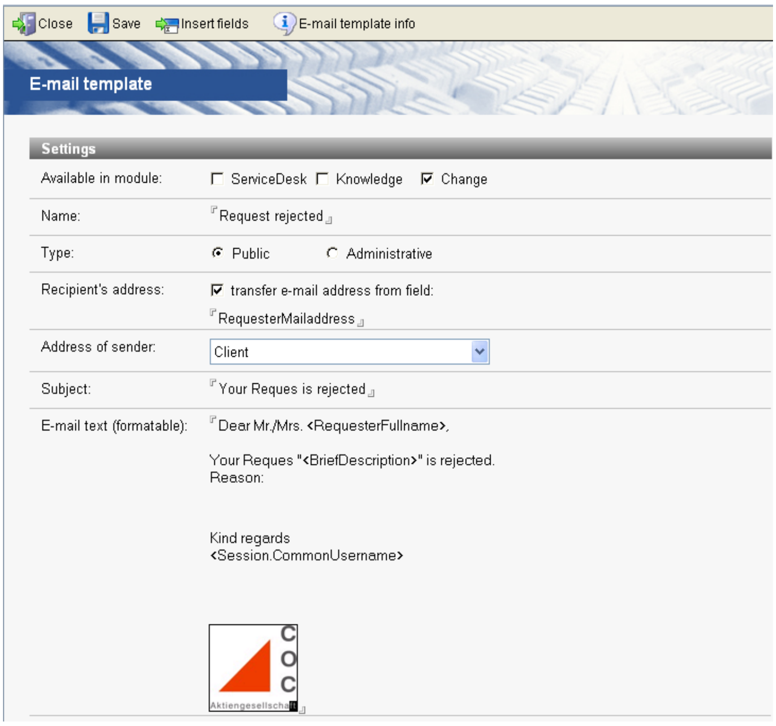


Fig. 14: How to create a new e-mail template

a) General information

Field name	Description
Available in module	Regulates the availability of the template in the individual HelpMatics™ modules
Document type	If the template is intended for use in the Change module, make a selection here
Name	Name of the template (will be used for selection in the ticket, RFC, Change or task)
Type	Public: E-mail templates that will be offered for selection in the documents after clicking the E-Mail button . Administrative: E-mail templates for notifying process editors/teams and escalation mails can be defined.
Recipient’s address	The recipient's address is only available for mail templates of the public type. You can automatically transfer the user's or reporter's e-mail address from the ticket with a <Field name> placeholder. In addition you can indicate definite e-mail addresses. Multiple values are separated by semicolon.
Address of Sender	E-mail address of the e-mail to be sent. Besides the address of the current user (stored in the process editor document) also the e-mail address stored in the document of the client of the user or of the client of the process editor can be used.
Subject	The subject of the e-mail You can use placeholders for fields here (see below for how to proceed).

b) E-mail text

Text of an e-mail. This text can be formatted.
Here as well, you can integrate placeholders for existing field values in the ticket (see below for how to proceed). If Notes Mail is used, file attachments inserted here will also be transferred to the e-mail.

c) Use of placeholders

It is possible to automatically transfer existing field contents of the ticket into the subject or mail text of an e-mail. When the e-mail is generated, these placeholders will be replaced by current values.

Using the Insert fields button you can insert almost any fields. To do so, position the cursor to the desired position in the text and select a field via Insert Fields.
Alternatively, you can enter the field name put in <> (e.g. <ReferenceNumber>) at the desired position. When formatting text, don't use different formats for a placeholder including the angle brackets.

Via Insert Fields a direct link to the ticket information in the user portal can be integrated. Choose the entry PORTAL LINK TO TICKET.

If several portals have been configured, a choice of portals is available in the next step. Select the portal the link is to be generated for.

These settings also apply to the Change module.

ENTERPRISE:

Administrative e-mail templates are categorized as local or central, depending on their place of creation. Central templates are available in all databases. Local templates are available in the central database and in the local database in which they were created.

6.5 Clients

6.5.1 Definition

In the Clients > Definition view you can see all clients whose members are supported.

With the Client - New button you can add a new client.

By double-clicking a client in the list, you can edit his profile. A description field is available in which you can also insert attachments.

- General

Here you define the service level template where information on ticket monitoring and process times is stored. Having selected a service level template, you can display its contents by clicking the 

button.

- ServiceDesk

Here you can enter the sender's e-mail address (e.g. e-mail address of the helpdesk). If answers to HelpMatics™ mails are to be sent to a different address, configure Answer to.

If e-mail assignment is activated, an e-mail with a valid ticket ID in the subject is automatically assigned to the ticket and marked in the views.

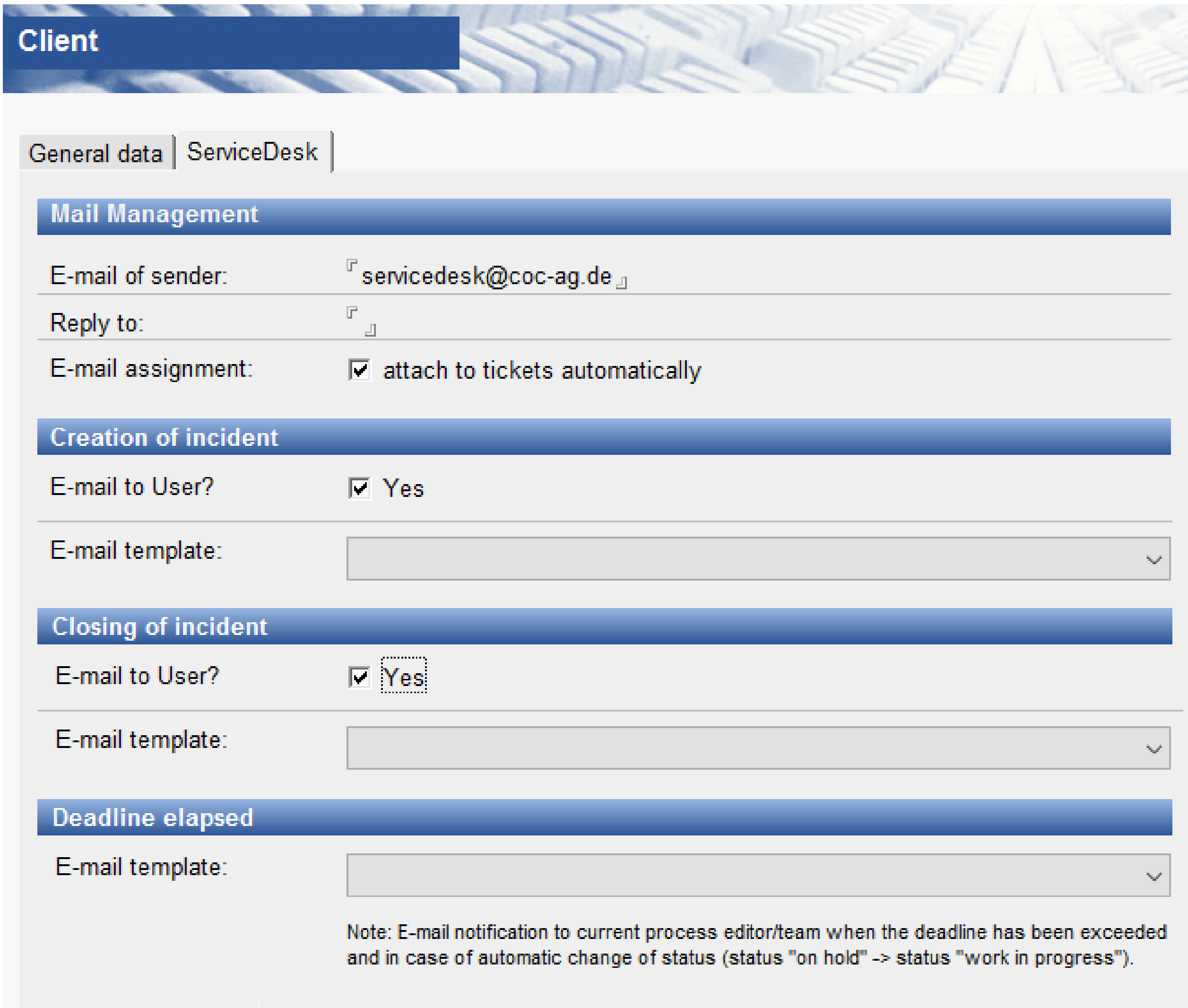


Fig. 15: Client-specific settings for the ServiceDesk module

E-MAIL TO USER? (at ticket creation and closing)

If these options are activated, you have to select a mail template that is to be started automatically when a ticket is created and a mail template that is to be started automatically when the ticket is closed. If both options are activated, only Mail to User will be started immediately when the ticket could be solved immediately and is closed.

If not a user, but a reporter is stored, the reporter will be informed.

It is mandatory to indicate an e-mail template for DEADLINE ELAPSED. The e-mail is sent as soon as the date is in the past and the status is set from on hold to work in progress.

- Change

You can enter the sender's address here. If answers to HelpMatics™ mails are to be sent to a different address, configure ANSWER TO.

Store the mail template required for sending status information to change managers, sponsors, executors and requesters of an RFC / Change. The persons to be informed can be set individually in the RFC / Change document.

6.5.2 Holidays

Here you'll find a list of all holidays when there is no support, i.e. when there is no ticket processing. By using the available buttons you can add and edit holidays.

Holidays are not counted as process time. This has an effect e.g. on the calculation of the target times and the calculation of the time actually required for solving a ticket.

6.6 Portal

6.6.1 User Portal

Here you can define User Portals which, depending on the configuration, allow users to:

- receive news from the info management
- search FAQs,
- report service requests or incidents and/or create tickets,
- retrieve information on their own tickets,
- send requests,
- if HelpMatics™ CMS Enterprise is used: display service catalog

Access to some areas of the user portal can be configured as anonymous or authenticated. This applies to the areas of FAQ and service catalog. Ticket tracking and ticket delivery requires authentication (Notes authentication, authentication via e-mail or LDPA). Requests can be submitted either by authentication (as set in the Authentication tab) or anonymously.

6.6.1.1 Requirements for using the web portal

- JavaScript must be activated in the browser.
- In the case of non-anonymous access, SINGLE SERVER must be activated in the Domino web access area of the server document.

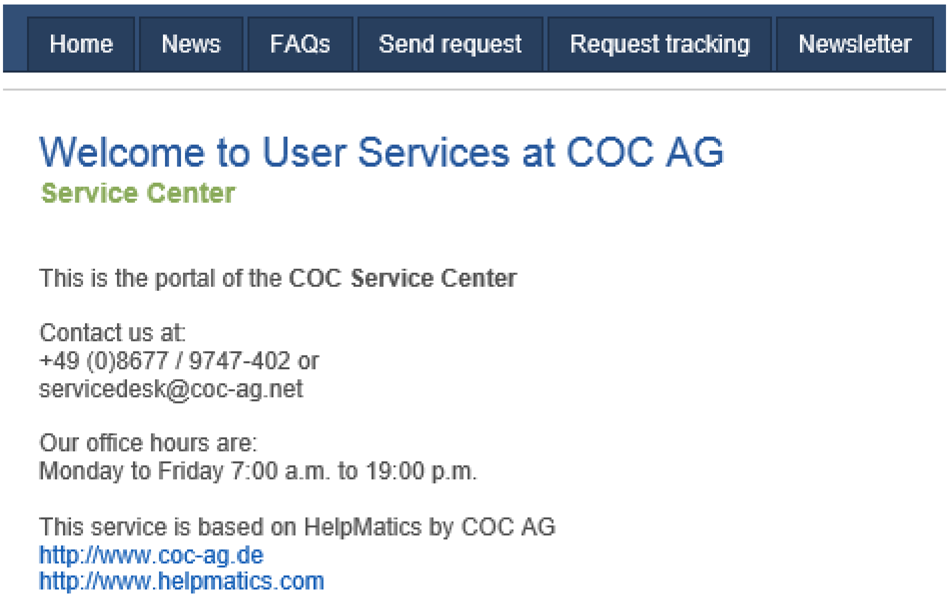


Fig. 16: Example of a user portal

6.6.1.2 General settings

You create a new portal definition by clicking PORTAL – NEW:

An individual Web Link will be generated for each portal that can be made available to the respective users. This link will be available after first saving. Via the Regenerate link button you can regenerate this link. If you want to display your own logo, attach the corresponding file (file type: JPG or GIF) via the Attach Logo button to the document.

Individual portal pages can also be integrated via an individual link, e.g. into an Intranet page: By clicking Direct Link in one of the tabs you'll get to the relevant page.

6.6.1.3 Design

The design of the portal is defined there via a style sheet file (*hm_portal.css*).

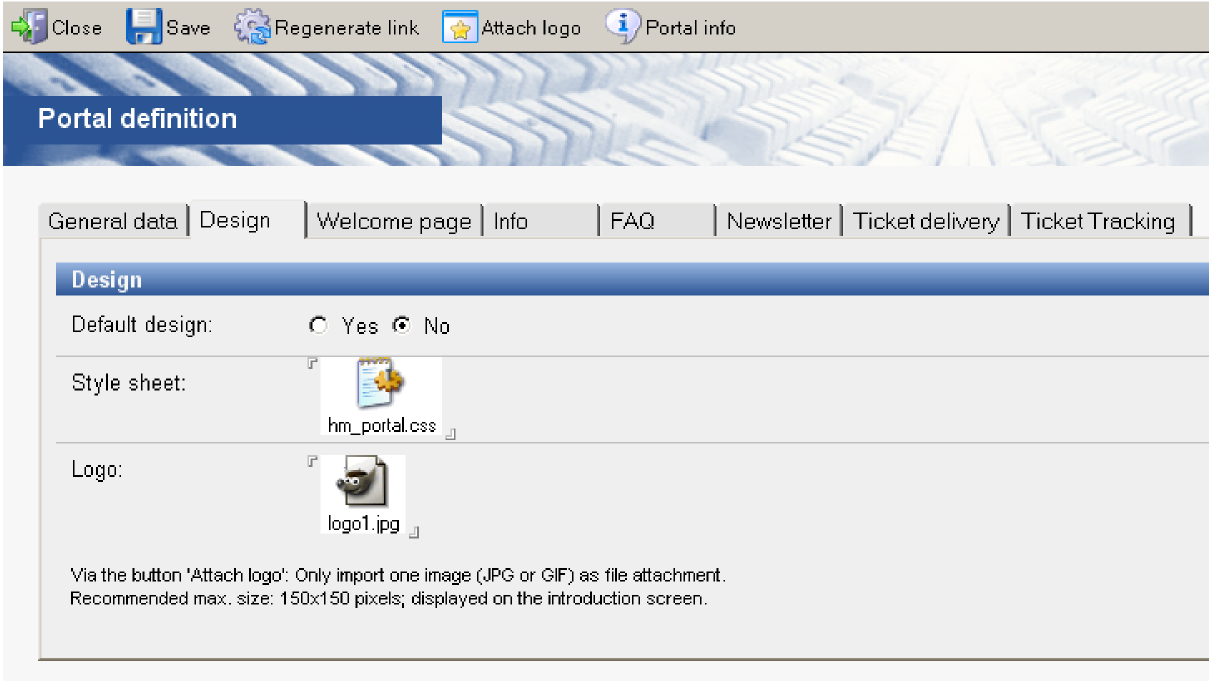


Fig. 17: Storing css-file and logo in the portal document

If the default design with configuration as per delivery is to be used, select Yes in the Default Design field. If you want to adapt the portal to your requirements or wishes, open the style sheet file by double-click and edit it in the editor.

Alternatively, the file can be stored locally in the file system and edited by any text or style sheet editor. After editing, the file is to be copied into the field again.

If you made a mistake when editing the file or want to restore the DEFAULT DESIGN, click the Yes button under Default design. As soon as you click Save, the delivery status of the original css-file will be restored.

6.6.1.1 Welcome page

Define the contents of the welcome page here. Formatting is made via css in the specified design. If you want to use other formats in the text / parts of the text of the welcome page, check the HTML box. This allows you to e.g. highlight individual words or insert links.

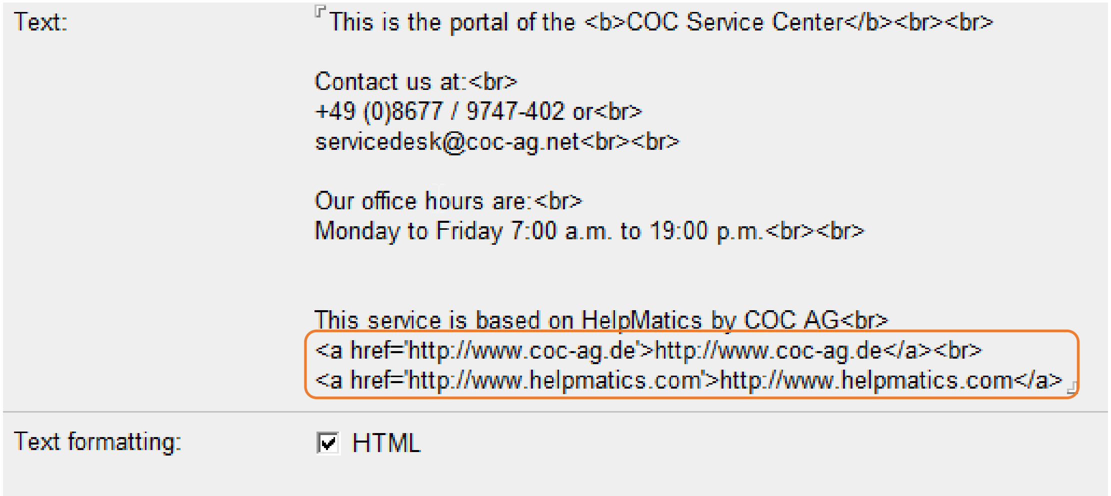


Fig. 18: Formatting the welcome page using HTML

6.6.1.2 Info

Here you can activate the display of info from the SERVICEDESK info board. Only information for which Display in Portal has been activated will be displayed.

6.6.1.3 FAQ

If you want to be linked to your knowledge base, you can activate FAQs. FAQs are accessed either anonymously or with authentication via user ID and password.

Please note: As soon as a user to be authenticated is shown in the FAQ area, ticket tracking and ticket delivery can only be made via e-mail authentication.

If Notes authentication has been set here, it is recommended to activate Anonymous in the portal definition for FAQ access. If the ACL of the portal database does not allow access for ANONYMOUS, Notes authentication will also be required for FAQ access.

Besides a convenient search function, the portal offers the user the option to evaluate FAQs. You can define the labeling of the corresponding buttons and message texts yourself.

6.6.1.4 Newsletter

Via a mailing list with optional (de)listing, current information can be selectively circulated to the users. The mailing lists are accessible in HelpMatics™ Knowledge under Editing Process > Newsletter Subscriptions.

6.6.1.5 Ticket delivery

If ticket templates have been released for the relevant portal, users can create tickets directly by using these templates. Released ticket templates are visible in the portal definition.

If no templates have been released for the relevant portal, text fields will be offered to the user for entering his/her data and the request. In this case an e-mail will be sent to HelpMatics™ ServiceDesk (Mail-In). By activating Send e-mail info to you can inform by e-mail any persons or teams you like on the filing of a new request.

Besides the default mandatory fields First name, Last name, Phone, E-mail and Description, you can provide additional fields. Here, too, you can define the labeling and the buttons according to your wishes.

Access to ticket delivery is granted either via Notes or via e-mail authentication. This setting is made in the Authentication tab.

Ticket delivery is authenticated as configured in the authentication tab.

6.6.1.6 Ticket tracking

Here the users of a portal get a list of their own tickets. The tickets include:

- Incidents, problems and service requests
- Requests
- RfCs and changes.

You can define which ticket data is to be displayed and how the labeling is to look like. The name of the editor processing the ticket is made anonymous in the request, processing and solution fields.

Using three search fields you can filter according to different criteria:

- Type
    - Tickets (my own)
    - Tickets reported for other persons
    - Your own requests
    - Requests reported for other persons
    -
- Status
    - in preparation
    - active
    - closed
- Full text search

You store the labeling in the portal definition.

During ticket processing the user can make comments. Depending on the configuration, the comment is transferred directly to one of the fields, i.e. request, process or solution fields. If configured for the process editor, the editor processing the ticket will receive a notification.

Access to ticket tracking is granted either via Notes or via e-mail authentication. This setting is made in the Authentication tab.

Ticket delivery is authenticated as configured in the authentication tab.

The direct link leads you to the ticket overview. After having logged in the user gets a list of his/her own tickets.

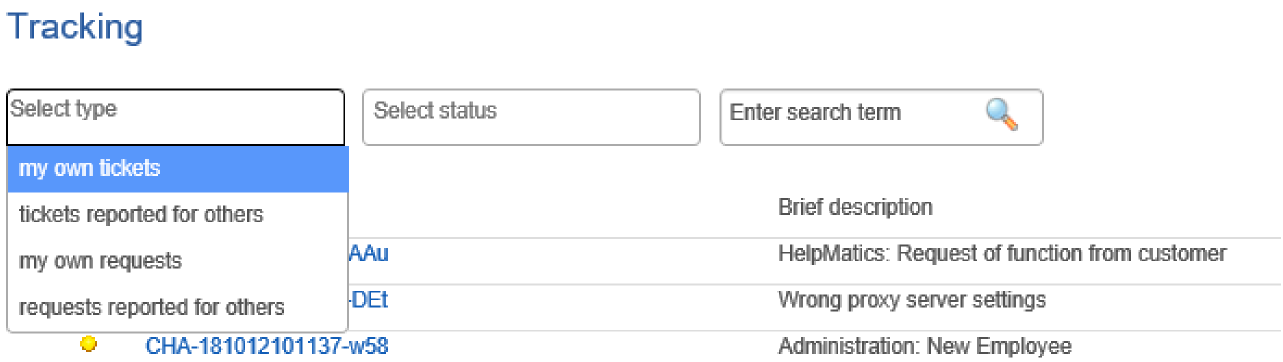


Fig. 19 Ticket tracking with filter

This information can also be retrieved via the direct link for ticket tracking.
Example of a ticket tracking link:
http://server/path/xpSoloPortalTrackingAuth.xsp?action=openDocument&documentId=C12571240037E122C12574560039ADF2

When configuring mail templates you can provide a direct link to a ticket for the user. (see chapt. 6.4). Create the ticket link via the Insert fields – Field names of a ticket – Portal link to ticket function. The document ID parameter contains the ID of the portal. Please note that this parameter takes a different value for each portal defined.

Example of a link leading directly to the ticket information:
https://server/path/xpFormTicket.xsp?documentId=39D46AA4099A23ECC1257B6C002BBC76&TicketDocId=<TICKET>

If this link is inserted into the text of a mail template, the <Ticket> parameter will be replaced by the ID of the current ticket when the e-mail is generated:
Example of a complete ticket link:
https://server/path/xpFormTicket.xsp?documentId=39D46AA4099A23ECC1257B6C002BBC76&TicketDocId=C7BA46929D6DF4ABC1257C140030CE9F

HELPMATICS™ CMS ENTERPRISE:

6.6.1.7 Service catalog

The service catalog is only available in HelpMatics™ CMS Enterprise. CIs of the Service type can be provided with additional information for the end user and can be listed in a service catalog. These settings are stored in the CMS Enterprise. The service catalog can be made available to the user via a portal.

Fig. 20: Service catalog configuration

Here you define the labeling, descriptions and their order. Access to the service catalog can be made via configured authentication (see Authentication tab) or anonymously - without any authentication.

6.6.1.8 Web request form

Web request forms will only be visible when a web request form has been configured in HelpMatics™ Change and released for the desired portal (cf. chapt. 9.5.1**Error! Reference source not found.**)

Web request forms can be submitted either by authentication (as set in the Authentication tab) or anonymously.

6.6.1.9 Authentication

Ticket delivery and ticket tracking are only possible for authenticated users.

Authentication is made via Notes or via a combination of e-mail link and cookie. Based on the authentication, the user's e-mail address is determined. The login to the portal will only be successful if a unique user is found in the CMS on the basis of this e-mail address.

a) Notes Authentication
   The process editor logs in with his/her Notes account.

b) E-Mail Authentication
   After having entered his/her e-mail address the user gets an e-mail with a personalized link. The login data can be saved permanently (cookie).

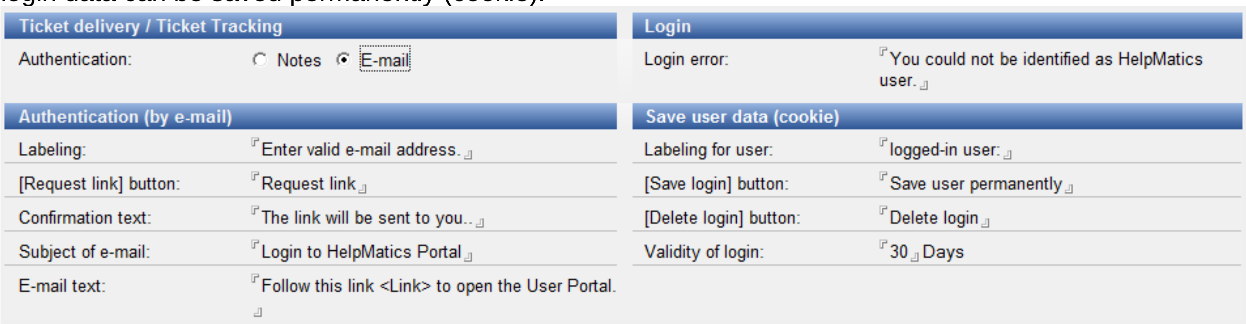


Fig. 21: Configuration of e-mail authentication

c) LDAP authentication
   The user logs on with the LDAP user data (e.g. if connected to the active directory, the user logs on with his/her Windows user/password).

6.6.2 Service cockpit

This area allows you to create service cockpits (see also Ticket monitoring in the service cockpit 2.0).
A service cockpit provides a quick overview of all KPIs (key performance indicators) for the incident manager (or servicedesk manager, etc.):

The number of tickets per day is displayed under Ticket volume. In client monitoring you can see immediately how the ticket volume is divided into the different monitoring levels. Further charts show resolution rate, process time, user satisfaction and any other KPI. The light-gray pointer indicates the average of the past (period can be set – 1 to 3 months), the dark-gray one the average of the past 24 hours. The data will be updated regularly in configurable periods in the background.

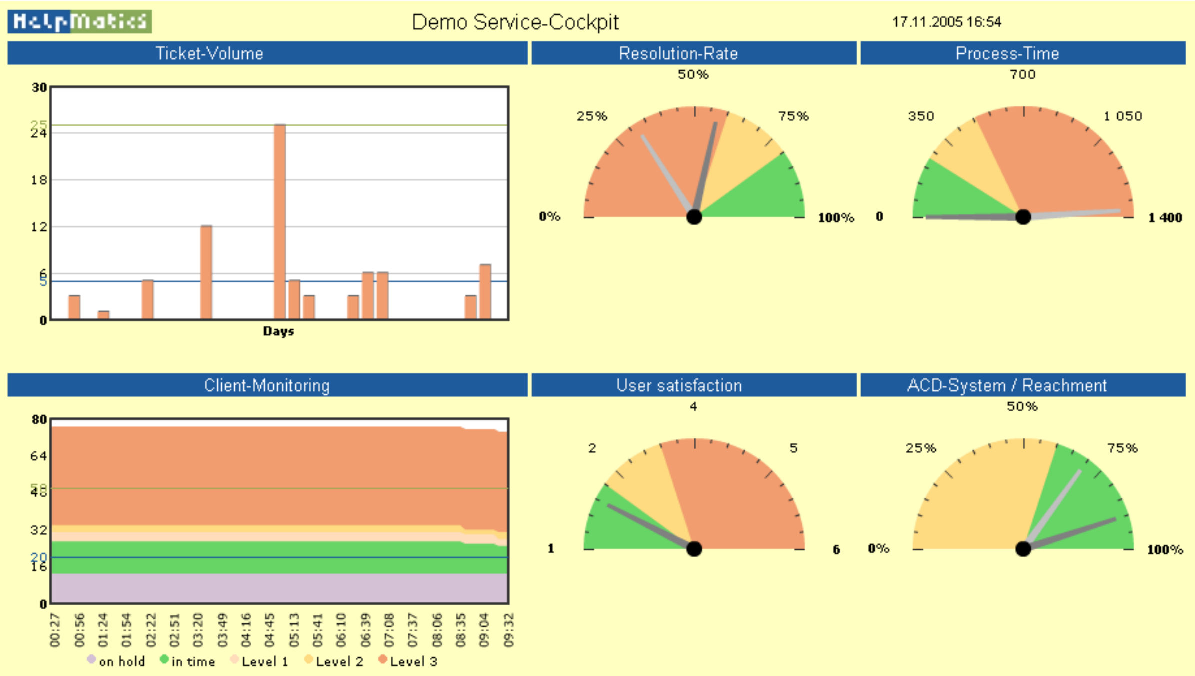


Fig. 22: Service cockpit

6.6.2.1 General

Name and heading of the service cockpit are to be entered there.
The Web link will be generated automatically when saving. In this process the Web link data under ADMINISTRATION > MODULES is accessed.

Furthermore, filter settings (according to client and the department of the responsible person/team) as well as the settings for determination of average and for background color are made. Determination of average refers to resolution rate, process time and user satisfaction.

6.6.2.2 Chart configuration

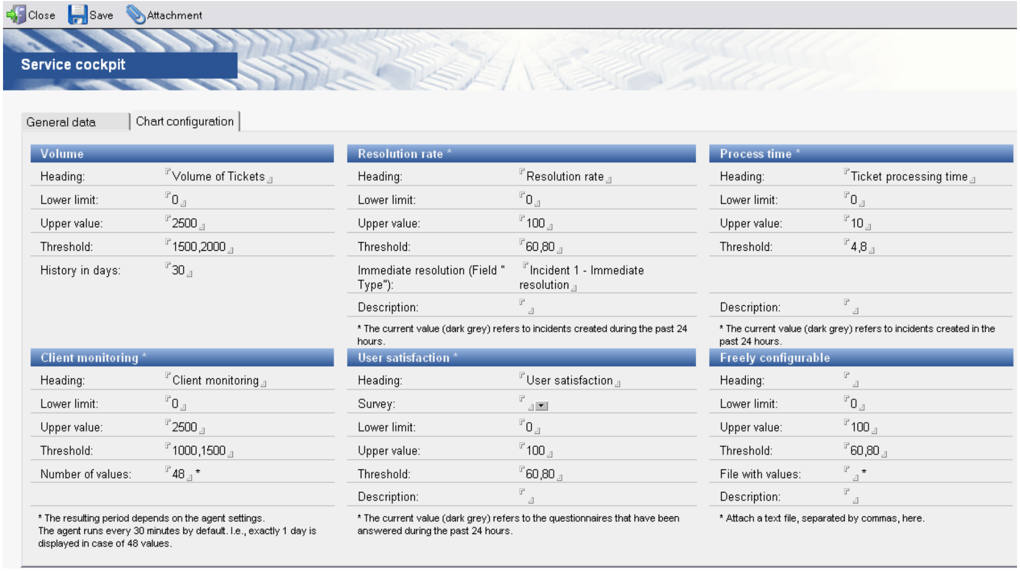


Fig. 23: Chart configuration

Labeling and thresholds of the individual KPIs to be displayed can be defined there. In the Volume and Client Monitoring charts, vertical lines will be drawn in for the thresholds, in the other four charts, the color of the scale will change for the thresholds.

- Volume

This allows you to keep track of the number of tickets received recently.

- Resolution rate

Here the share of immediately solved incidents in the total number of incidents is shown. In case of immediate solution, the status changes from open to→closed.

- Process time

The average process time is plotted in minutes.

- Client monitoring

Here you see the development of the ticket numbers in the individual monitoring levels over the last up to 100 agent runs. Depending on how often the agent runs, a short or long period of time may thus be illustrated.

- User satisfaction

Here a survey created in HelpMatics™ Survey can be interpreted. The average of the graded questions of each answered questionnaire flows into the values shown by the indices. Therefore, please make sure that the same scale is used in a questionnaire with several graded questions.

- Freely configurable

You can attach a text file with two values separated by comma. The first value is symbolized by the dark gray, the second one by the light gray index.

6.7 Maintenance

6.7.1 Replication conflicts

In this view you can see the conflict documents: If two persons edit one and the same document and store it, there will be a version conflict; as a result a so-called conflict document will be created, which then appears in this view.

To find out which of the two documents, conflict or main document, contains the currently valid information, it is necessary to determine which field change(s) has/have led to the replication conflict.

This can easily be ascertained by using the **Compare Fields** button after one conflict document has been selected. For this purpose, position the cursor to the line [replication or storage conflict]. After activating the button, a list of the fields concerned and their contents will be displayed in a dialog window. Notes-specific fields with "$" prefix do not have to be taken into account.

Fig. 24: Replication conflicts

Subsequently, if the comparison of fields yields a relevant difference, the conflict and the main document will be opened one on top of the other via the Conflict/Main Document button and the current field contents will be overwritten by copy/paste (clipboard). The document updated in this way will be saved and the document no longer required will be deleted.

If the conflict document contains the valid information, it will become the main document by clicking Convert to main document. Please note that the previous main document should be deleted since otherwise two main documents with identical ticket ID and almost identical content would exist. Only users with [&R_MANAGER] role are allowed to convert conflict documents into main documents.

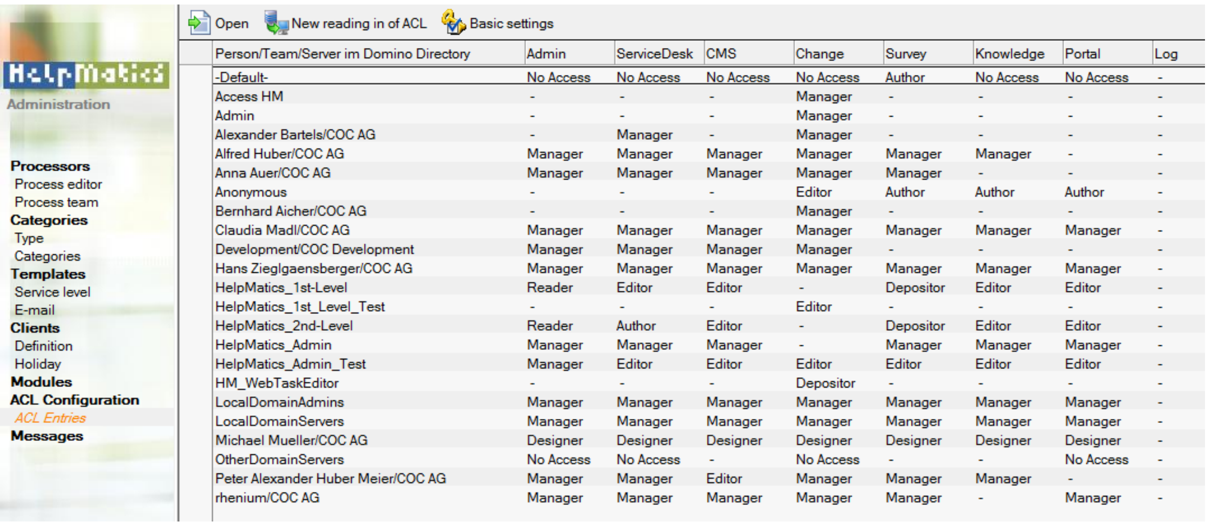
You can prevent simultaneous editing of documents. Refer to Locking Documents in the HCL Notes Help.

6.7.2 Messages

Program messages (green icon) e.g. on faulty configuration, missing documents and program errors (red icon) are logged there.

6.8 ACL configuration

Users with manager rights can view all existing ACL entries of all HelpMatics™ modules via ADMINISTRATION – ACL CONFIGURATION – ACL ENTRIES.



Person/Team/Server im Domino Directory	Admin	ServiceDesk	CMS	Change	Survey	Knowledge	Portal	Log
-Default-	No Access	No Access	No Access	No Access	Author	No Access	No Access	-
Access HM	-	-	-	Manager	-	-	-	-
Admin	-	-	-	Manager	-	-	-	-
Alexander Bartels/COC AG	-	Manager	-	Manager	-	-	-	-
Alfred Huber/COC AG	Manager	Manager	Manager	Manager	Manager	Manager	-	-
Anna Auer/COC AG	Manager	Manager	Manager	Manager	Manager	-	-	-
Anonymous	-	-	-	Editor	Author	Author	Author	-
Bernhard Aicher/COC AG	-	-	-	Manager	-	-	-	-
Claudia Madl/COC AG	Manager	Manager	Manager	Manager	Manager	Manager	Manager	-
Development/COC Development	Manager	Manager	Manager	Manager	-	-	-	-
Hans Zieglgaensberger/COC AG	Manager	Manager	Manager	Manager	Manager	Manager	Manager	-
HelpMatics_1st-Level	Reader	Editor	Editor	-	Depositor	Editor	Editor	-
HelpMatics_1st_Level_Test	-	-	-	Editor	-	-	-	-
HelpMatics_2nd-Level	Reader	Author	Editor	-	Depositor	Editor	Editor	-
HelpMatics_Admin	Manager	Manager	Manager	-	Manager	Manager	Manager	-
HelpMatics_Admin_Test	Manager	Editor	Editor	Editor	Editor	Editor	Editor	-
HM_WebTaskEditor	-	-	-	Depositor	-	-	-	-
LocalDomainAdmins	Manager	Manager	Manager	Manager	Manager	Manager	Manager	-
LocalDomainServers	Manager	Manager	Manager	Manager	Manager	Manager	Manager	-
Michael Mueller/COC AG	Designer	Designer	Designer	Designer	Designer	Designer	Designer	-
OtherDomainServers	No Access	No Access	-	No Access	-	-	No Access	-
Peter Alexander Huber Meier/COC AG	Manager	Manager	Editor	Manager	Manager	Manager	-	-
rhenium/COC AG	Manager	Manager	Manager	Manager	Manager	-	Manager	-

Fig. 25: ACL configuration

6.8.1 Basic settings

To ensure a correct display of the ACL configuration concerning a person/group/server, the roles existing in the modules have to be read in first via the basic settings button. When the basic settings are opened for the first time, the roles will be imported automatically. To guarantee a correct display, the respective basic settings have later to be updated via the import roles from acl button.

Fig. 26: ACL configuration

6.8.2 Reload from ACL

By clicking the New reading in of acl button, the ACL entries of all HelpMatics™ databases will newly be read in. A document will be created and/or updated for each person/group/server existing at least in one database.

6.8.3 Open ACL document

When you double-click an ACL document, or when you select the document and click the Open button, the person's/group's/server's access rights to HelpMatics™ databases will be displayed.

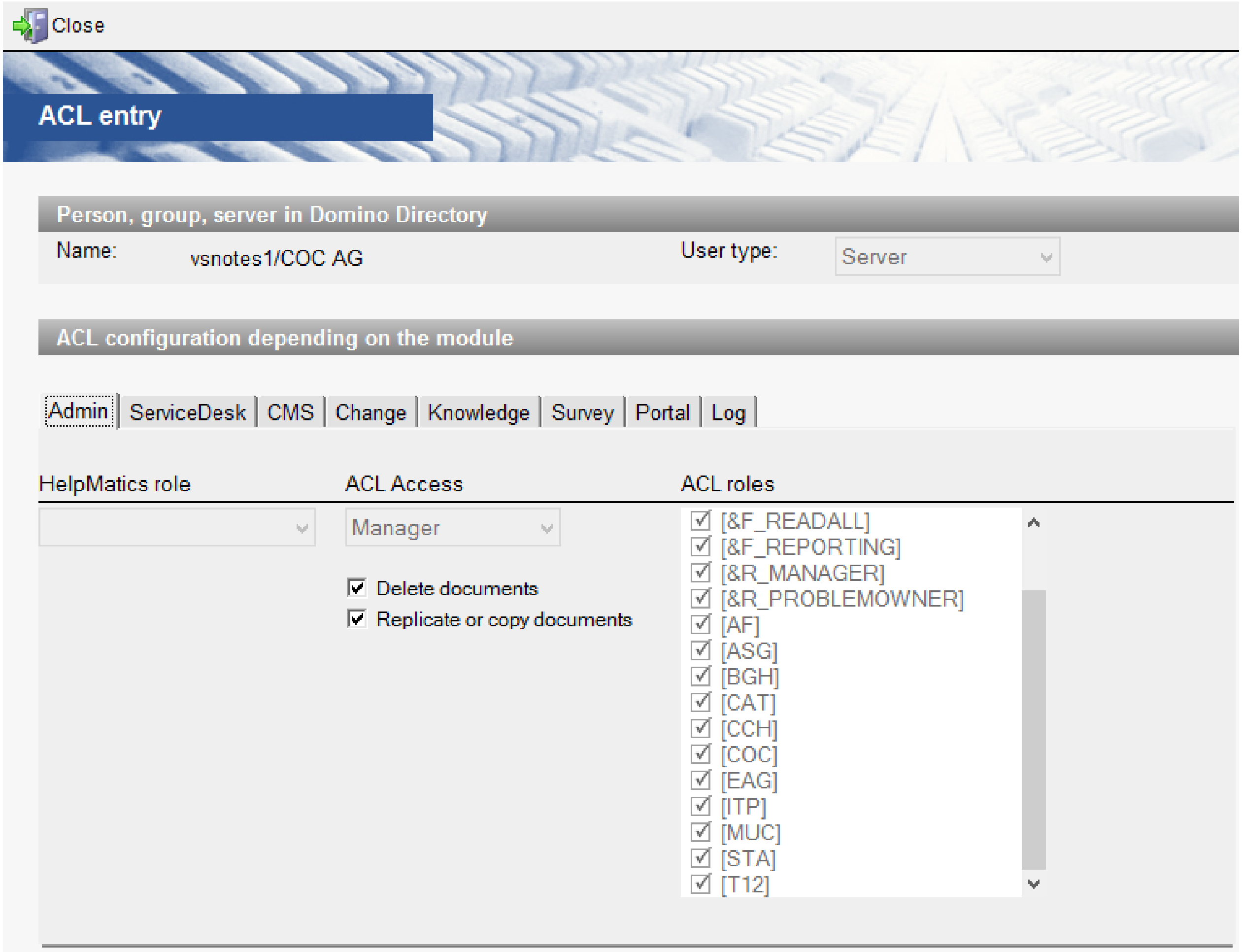
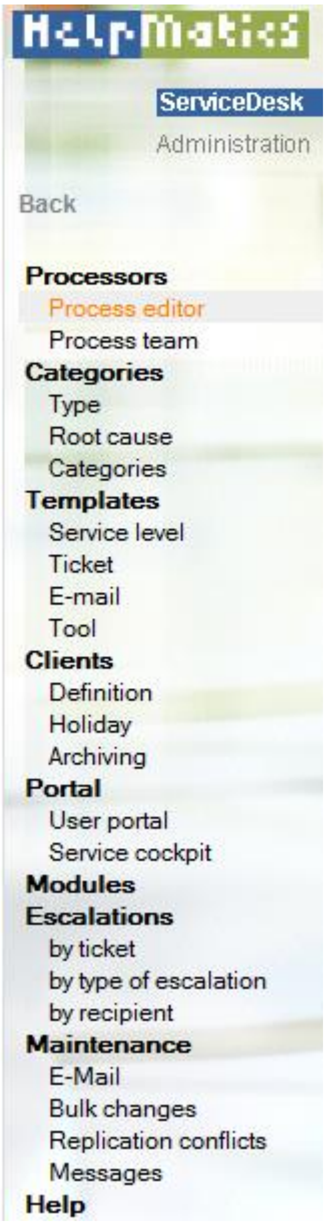


Fig. 27: ACL configuration

7 Administration of HelpMatics™ ServiceDesk

7.1 Navigation



By clicking Administration in the main navigator of HelpMatics™ ServiceDesk you open the administration navigator.

By clicking Back you return to the main menu.

Note:
You will get this selection only if you are granted the respective rights.

You can make all administrative settings for HelpMatics™ ServiceDesk there.

In addition to the administration of helpdesk team members, you can determine the categorizations, create ticket templates for quickly recording frequently recurring problems and make client settings there.

Important:

Before using HelpMatics™ for the first time, you have to make some basic settings that were dealt with in paragraph 3.2.

You will find menu entries not dealt with here in paragraph 6 ADMINISTRATION OF HELPMATICS™ - General.

7.2 Categories

- Root causes

To classify tickets by root cause, you have to create different root cause types here.

Root causes can be defined to be valid for all types or only for certain types. Thus, appropriately configured root causes are available for certain ticket types only. If the ticket type changes, the root cause may be removed and may have to be newly assigned.

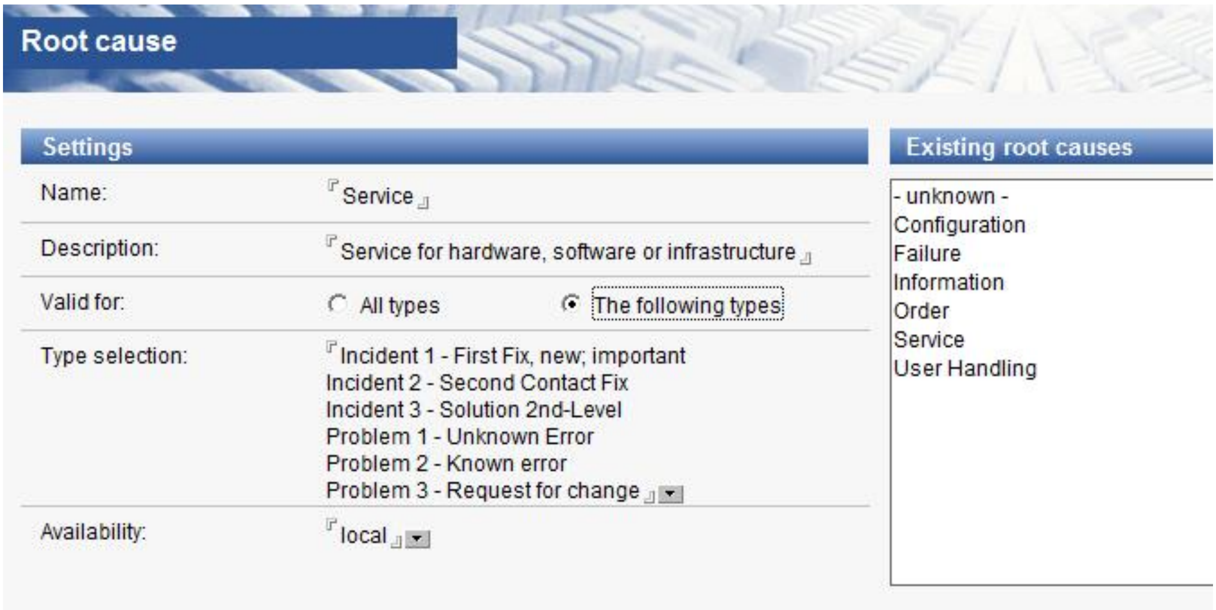


Fig. 28: Type-root cause connection

7.3 Templates

7.3.1 Service level template

- Ticket monitoring

Ticket monitoring can be considered from two perspectives:

a) Monitoring of the agreed process times per client in relation to the user:
Process times agreed between the users of a client and the servicedesk. The target date will be determined on the basis of the creation date of the ticket. Here, the service and process times of the template stored in the corresponding client document will apply.

b) Monitoring of the agreed service times per process team in relation to the servicedesk:
Process times agreed between servicedesk and certain process teams. The process time will start from the moment the ticket is passed on to the current process team. Here, the service and process times of the template stored in the process team document will apply. Only in case a certain process team cannot be clearly identified will the settings of the process editor document apply.

So, service level templates can be defined for clients and for process editors/teams. In these templates, service times, process times for different priorities and monitoring functions are stored. A service level template will be assigned to each client. In the same way, a service level template can be assigned to each process team and, if required, to each process editor. The monitoring relating to a process editor can be switched off in the process team or process editor document. Please note, however, that the settings of the process editor document will only be effective if it isn't possible to clearly identify a process team. This may be the case if a process editor hasn't been assigned to any team or has been assigned to several teams. Even then it may be possible to identify the process team if one of the teams assigned to the process editor had been active as process team before the ticket was forwarded to him/her.

- Target time calculation

The process times planned for the different priorities are defined in the Process Time tab of the service level template. They can be specified in minutes, hours or days. Holidays, times out of the service times (as specified in the Service times tab) and On hold status periods are not regarded as process time.

Calculation if specified in minutes or hours:

The specified time is calculated on the basis of the start time and the available service times. If the start time is before the start of service times, the start of service times of the start day will be used as start time. If the start time is after the end of service times, the end of service times of the start day will be used as start time.

Calculation if Specified in days:

Whole days will be added to the start time. If time is not expressed as an integer, the rest time will be calculated in minutes taking the average duration of service times into account, and will then be calculated as if Specified in minutes. If, in case time is expressed as an integer, the calculated target time is a point in time out of the service times, the start of service times or end of service times of the respective target day will be set.

In the ticket – Responsibility tab -, the target time relating to the client is displayed in the responsible person/team line, the target time relating to the process editor in the process editor / [process team] line under Deadline.

- Automatic escalation

You can define three time stages in percent of the process time for which e-mail notifications are to be sent when they are reached.

Every 15 minutes an agent checks all tickets the status of which isn't closed (status not closed or return status not processing completed (user informed)) or on hold if an escalation level has been exceeded and sends escalation mails, if necessary. To initialize the sending of e-mails, the start date for escalation mails must be set via ADMINISTRATION > MODULES > AGENT Settings. An e-mail will be sent only for tickets the escalation of which is after this date. A log entry is made when an escalation e-mail is sent successfully. The log entries relating to escalations with link to the ticket affected can now be viewed via the ADMINISTRATION > ESCALATIONS menu.

Under ADMINISTRATION > MAINTENANCE > MESSAGES, you'll find messages on missing start dates, missing service level template entries etc.

- Example: Automatic Escalations:

The following diagram shows the escalations to be initiated for a ticket if both, for the client and the process teams A and B, escalation levels have been defined at 25%, 50% and 75%:

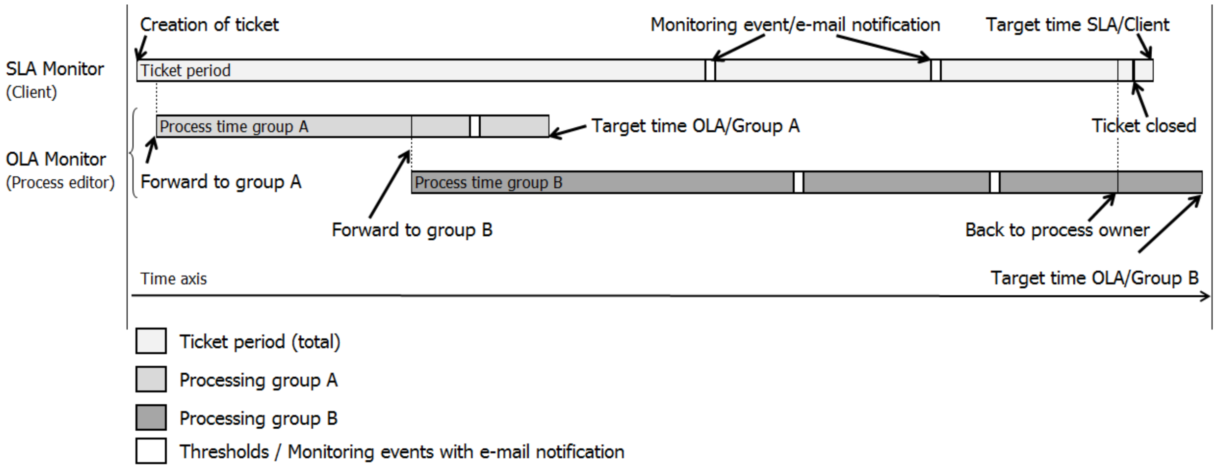


Fig. 29: Example of automatic escalation

The escalation level for process team A was not reached in this example since the ticket had been forwarded to process team B before.

- Special case: ON HOLD status

If a ticket is set to ON HOLD, calculated processing targets will be ineffective until the status is set to work in progress or assigned external again. A new target date will then be calculated, taking the on hold period into account.

- Calculation of lead time and response time

The lead time is calculated for tickets created via Mail-In. It is calculated from the time of receipt in the mail-in and the time of ticket creation, taking the service times into account. The lead time is shown in the Reporting in an overview, categorized by ticket source and time grid.

The Response time is calculated from the time of creation of a ticket (open status) and the time of first editing of a ticket by the assigned process editor (on hold status), taking the service times into account. When the ticket is edited for the first time, the status will, however, be set to work in progress if the logged in user is also process editor of the ticket. In the Reporting, the response time is specified as average value sorted by maximum value.

- Creation of service level templates

There are 2 types of service level templates:

- service level templates that are assigned to clients,
- service level templates that can be assigned to process editors or process teams.

You decide which one to create by clicking the SERVICE LEVEL – NEW > FOR CLIENTS button or SERVICE LEVEL – NEW > FOR PROCESS EDITORS button.

- Design of the service level templates:

Tab 1 - Definition

In this tab you enter the name of the template. Moreover, you can enter a brief description.

Tab 2 – Service Times

The service times are taken into account when calculating the target date for closing the ticket.

The specification of the time zone allows correct calculations also in global support structures. Please bear in mind that the (de)activation of daylight saving time in the Service Times tab will not be carried out automatically. In case of a wrong setting, target time calculations may differ up to one hour, e.g. when, if daylight saving time is activated in winter, a ticket target time falls up to 59 minutes before the service time ends.

Tab 3 – Process time

On the basis of the process time, which can vary for the different priorities, a target date will be determined.

In the definition of the process times, there are differences between service level templates for clients and service level templates for process editors:

Service level template for clients

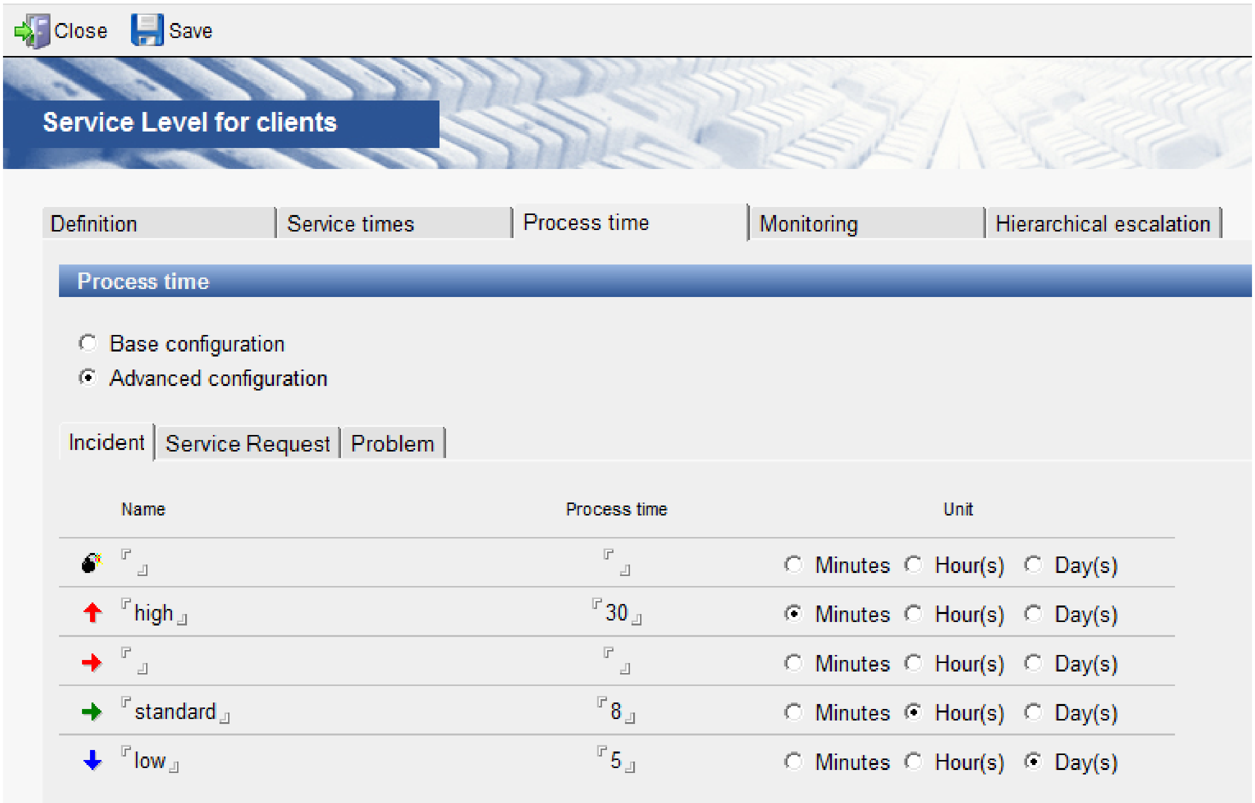


Fig. 30: Service level template for clients

Description and Process time can be specified in minutes, hours or days for one to five different priorities. A value must be stored for the standard process time ( ).

Via Advanced configuration you can define different process times for the ticket types Incident, Service Request and Problem. You enter these types under ticket types.

In the Service Level Template for Process Editors, you can choose between absolute process time and process time as defined for the client:

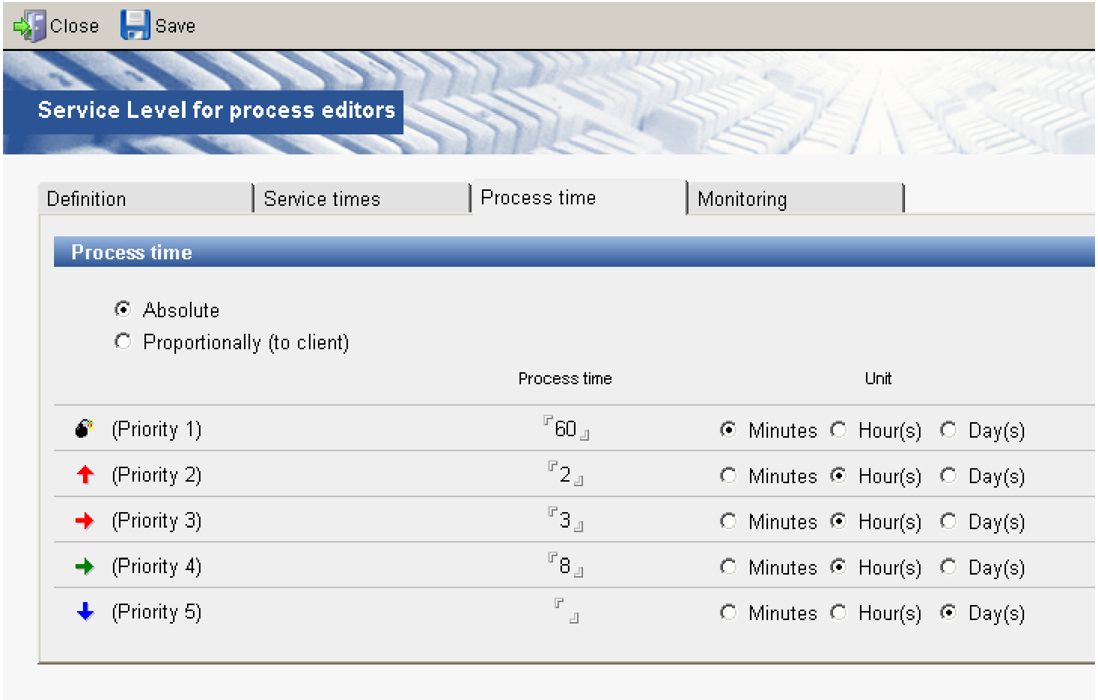


Fig. 31: Service level template for process editors - absolute

The description of priority cannot be defined as it is client-dependent. For a ticket, you can choose from the priorities defined for the corresponding client. The priority of the ticket is used for determining the available process time of the current process team. Therefore, a process time should be defined for every possible priority (1-5).

Alternatively, reference can be made to the process times defined for the client of the ticket when defining the process time for process editors: In the example (see Fig. 32) the same process times as those for the client apply.
Important: The basis for calculating the client-related target date is the ticket creation date, whereas the target date for process editor monitoring is determined on the basis of the date of forwarding the ticket to the process team.

Fig. 32: Service level template for process editors - proportionally (to client)

Tab 4 – Monitoring

Automatic actions are specified in three levels there.

So you can choose a mail template there which is to be used when a ticket has reached the specified escalation level and an e-mail is to be sent to the persons concerned.

In addition, you can define names for the escalation levels (these will appear in the monitoring view) and enter percent values for the individual levels.

Recommendation: Adopt the default names for the escalation levels as the sorting in the monitoring views can be affected thereby.

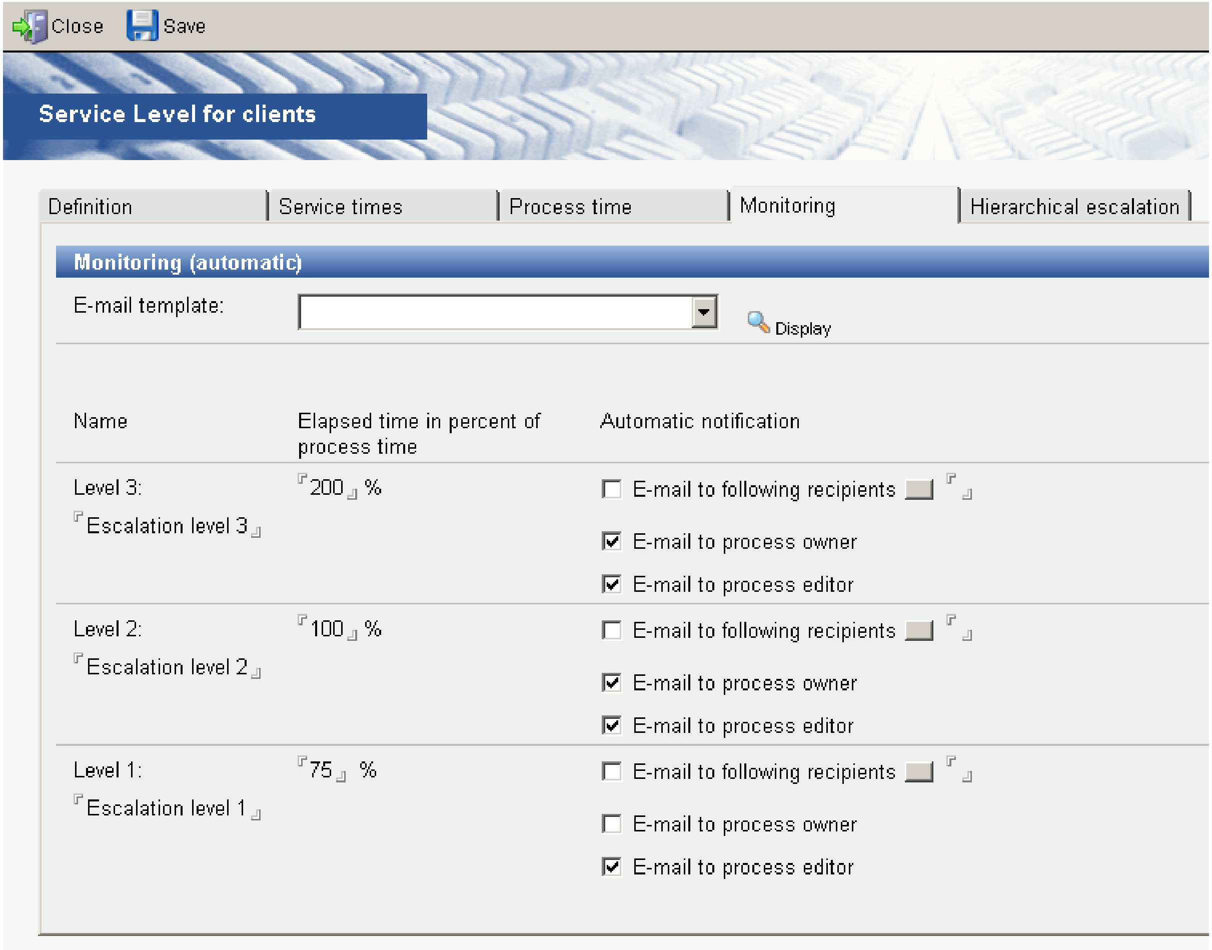
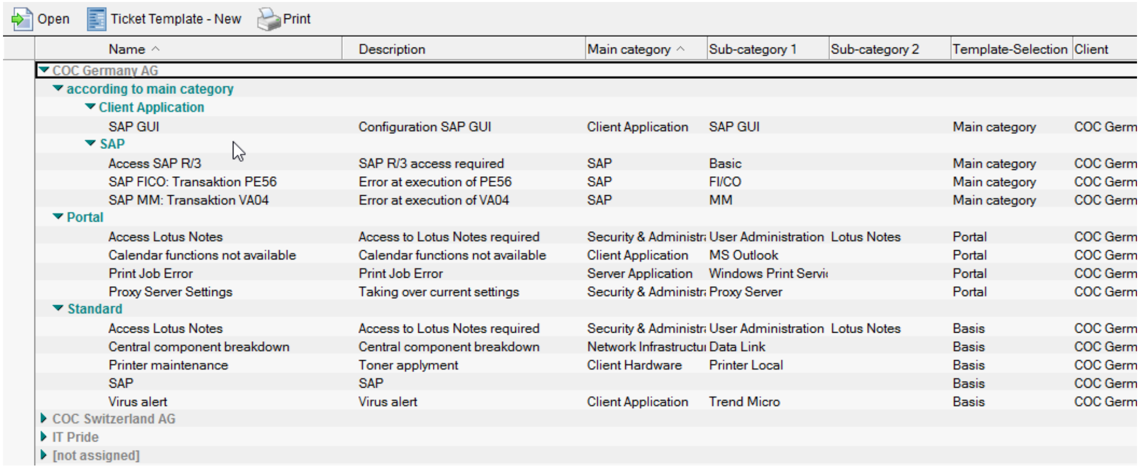


Fig. 33: Service Level for Clients

Tab 5 – Hierarchical escalation

In contrast to automatic escalation, hierarchical escalation is to be carried out manually in one of the monitoring views. Here you can define which e-mail template is to be used and who is usually to be addressed when the respective level has been reached. These settings are client-specific, i.e. they can only be made in the service level template for clients.

7.3.2 Ticket templates


Open | Ticket Template - New | Print

Name	Description	Main category	Sub-category 1	Sub-category 2	Template-Selection	Client
COC Germany AG						
according to main category						
Client Application						
SAP GUI	Configuration SAP GUI	Client Application	SAP GUI		Main category	COC Germ
SAP						
Access SAP R/3	SAP R/3 access required	SAP	Basic		Main category	COC Germ
SAP FICO: Transaktion PE56	Error at execution of PE56	SAP	FI/CO		Main category	COC Germ
SAP MM: Transaktion VA04	Error at execution of VA04	SAP	MM		Main category	COC Germ
Portal						
Access Lotus Notes	Access to Lotus Notes required	Security & Administr	User Administration	Lotus Notes	Portal	COC Germ
Calendar functions not available	Calendar functions not available	Client Application	MS Outlook		Portal	COC Germ
Print Job Error	Print Job Error	Server Application	Windows Print Servi		Portal	COC Germ
Proxy Server Settings	Taking over current settings	Security & Administr	Proxy Server		Portal	COC Germ
Standard						
Access Lotus Notes	Access to Lotus Notes required	Security & Administr	User Administration	Lotus Notes	Basis	COC Germ
Central component breakdown	Central component breakdown	Network Infrastructu	Data Link		Basis	COC Germ
Printer maintenance	Toner applyment	Client Hardware	Printer Local		Basis	COC Germ
SAP	SAP				Basis	COC Germ
Virus alert	Virus alert	Client Application	Trend Micro		Basis	COC Germ
COC Switzerland AG						
IT Pride						
[not assigned]						

Fig. 34: Ticket templates facilitating ticket recording

Templates make ticket recording a lot easier since all relevant data is filled in automatically.

Under TEMPLATES > TICKET you can see all ticket templates which the helpdesk team members can use to quickly and easily fill in a ticket.

With the Ticket Template - New button you can add a new template. Here you can define all fields which would otherwise have to be filled in individually in the rapid recording window. This template can then be selected in the rapid recording window.

You control the availability of the template in the rapid recorder via the Client and Template selection properties. Ticket templates with Client property are only available in tickets of the corresponding client.
If template selection is set to by main category, subcategory 1 or subcategory 2, the template will only be available after you have set the respective category in the rapid recorder, whereas ticket templates with Basic setting will be offered as long as no category has been selected in the rapid recorder. This property allows you to define a multi-level template selection, a decision tree: Create several basic templates whose categorization determines the next level of the templates available.

Templates with Portal setting are only available in the user portal. Additional settings such as

- Name of the responsible person/team
- priority of the newly created ticket
- description (tool tip to to facilitate ticket selection for the user)

are required.

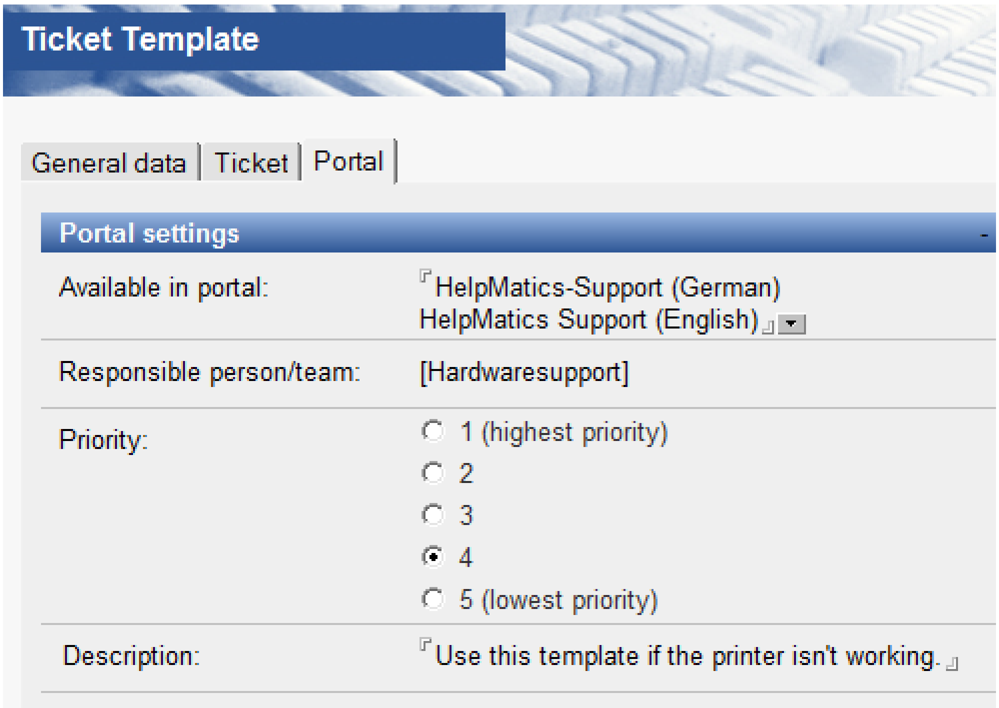


Fig. 35: Configuration of ticket templates for the Self-Service Portal

7.3.3 Tool templates

Create new tool templates to allow HelpMatics™ process editors to start other programs directly from the ticket.
This can be combined with any field values from the ticket (also refer to the Template Info button in the tool document).
Thus it is possible e.g. to directly transfer the IP address to the remote tool called. Of course, simple calls such as ping or tracert are possible as well.

7.4 Clients

7.4.1 Import

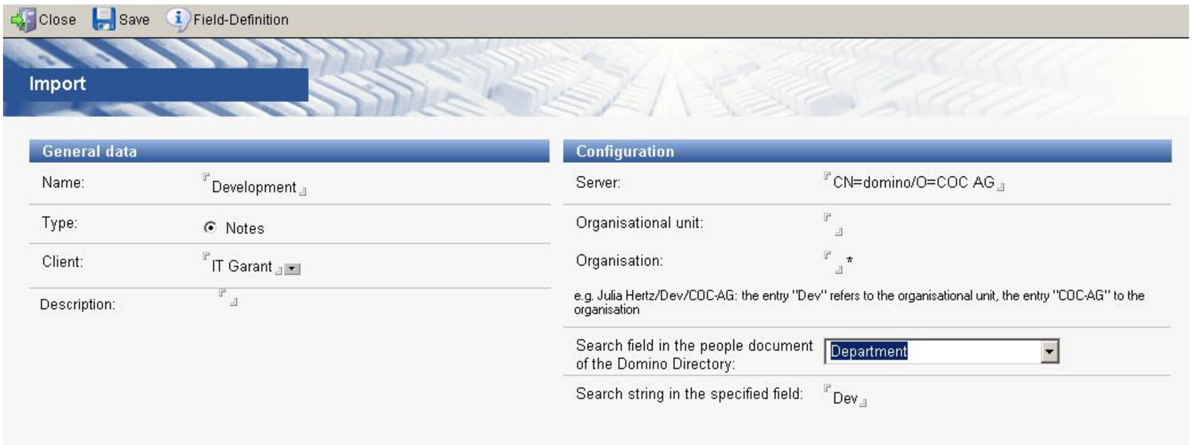


Fig. 36: Import from Notes Name and Address Book (NAB)

The Import can be configured to be lient-specific.

You can filter field-specifically from the Domino directory.

For a user import in HelpMatics™ ServiceDesk the contents of the following fields are transferred from the NAB by default:
LASTNAME, FIRSTNAME, OFFICEPHONENUMBER, CELLPHONENUMBER, OFFICEFAXPHONENUMBER, DEPARTMENT, LOCATION, SHORTNAME, EMPLOYEEID AND MAILADDRESS.

Only documents where the field contents of the source DB deviate from those of the target DB (HelpMatics™ ServiceDesk) will be imported or overwritten on field level. This guarantees minimization of replications. In case of automatic import, documents (user data) should not be changed in HelpMatics™ since the field contents could otherwise be overwritten.

7.4.2 Archiving

HelpMatics™ ServiceDesk requires extended archiving settings. These are defined under "Archiving". Only closed tickets will be moved.

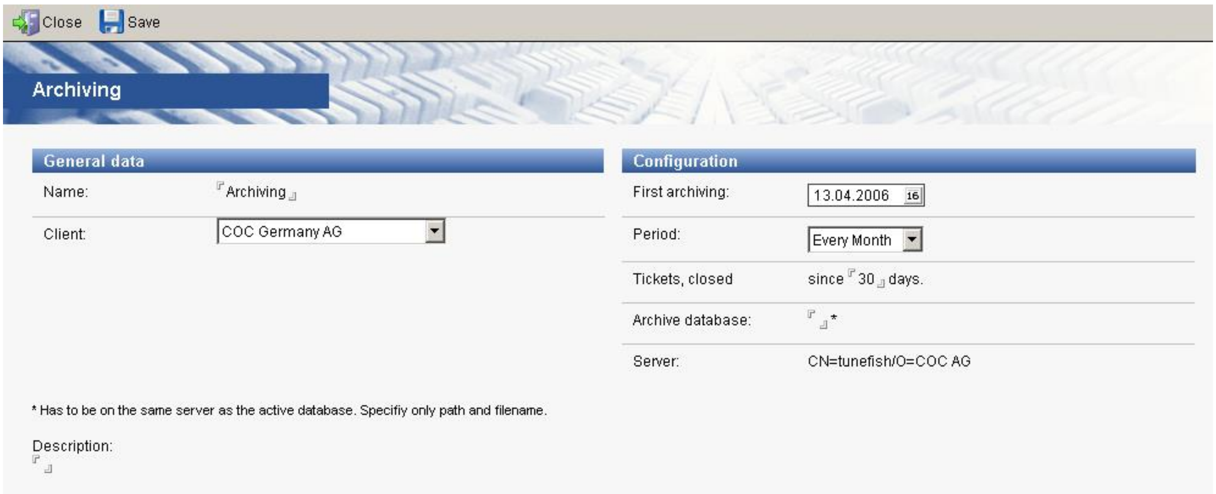


Fig. 37: Archiving settings for closed tickets

7.5 Modules

Important for defining the basic configuration of HelpMatics™ ServiceDesk. Links to other modules (Knowledge, Survey, Change) and further settings for HelpMatics™ ServiceDesk are specified there. In the Agents tab the server name for periodically running agents is set.

Please note that these settings are server-specific, i.e. this item is to be edited for each server also in case of cluster operation.

7.6 Maintenance

- Delivery reports

In this view, all e-mails that cannot be delivered when sent from HelpMatics™ are displayed.

- Bulk changes

By using this function you can change any field value of existing tickets (when called from the ServiceDesk module) and resources (when called from the Configuration Management module).

Enter the old field content to be replaced as well as the new field content.
Select the field to be changed from the dropdown list and specify further criteria. Determine under execution if the change is to be made immediately after Activation. If a date is specified, a periodical agent will execute the change when due.

Please note:
This function updates all tickets/resources concerned. This may take some time or, in case of parallel processing, lead to storage and replication conflicts. For this reason a scheduled execution is recommended.

7.7 Automatic e-mail processing

A periodical agent monitors the Mail-In area of HelpMatics™ and filters the e-mails showing a ticket ID in the subject. The e-mail will be attached to the ticket, the process editor will be informed and a flag will be set.

The following configurations are necessary:

- Mail-In Management must be activated for each client:

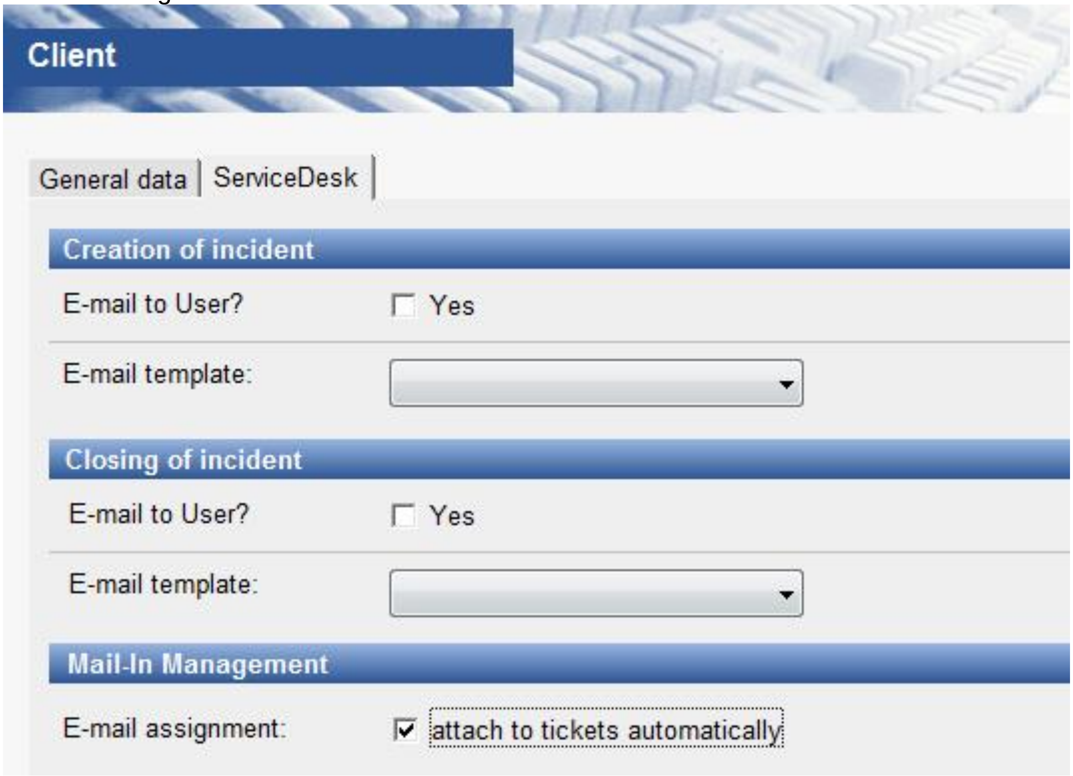
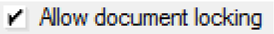


Fig. 38: Mail-In Management

- At database level of the HelpMatics™ ServiceDesk database, Document locking must be activated.



- For the process editor/process team to be informed, e-mail notification when a ticket is assigned has to be activated for the process editor/process team.

Please note:

- The ticket ID must be included in the subject of the e-mail.
- Closed tickets will not be taken into account by the agent.

7.8 Reporting

7.8.1 Reporting views

Concerning ticket selection, the reports are subdivided into the areas Incident and Problem . As in most cases Reporting is adapted to the customer's requirements, only an example of a report is shown below. By clicking the Report info button in the reporting views of HelpMatics™, you will get more detailed information.

Example: Incident > Overall reports > Category:
In this view you can see all incident tickets that have been created – subdivided into client and the three category levels (main category, subcategory 1 & 2). If necessary, the time distribution can also be viewed there.

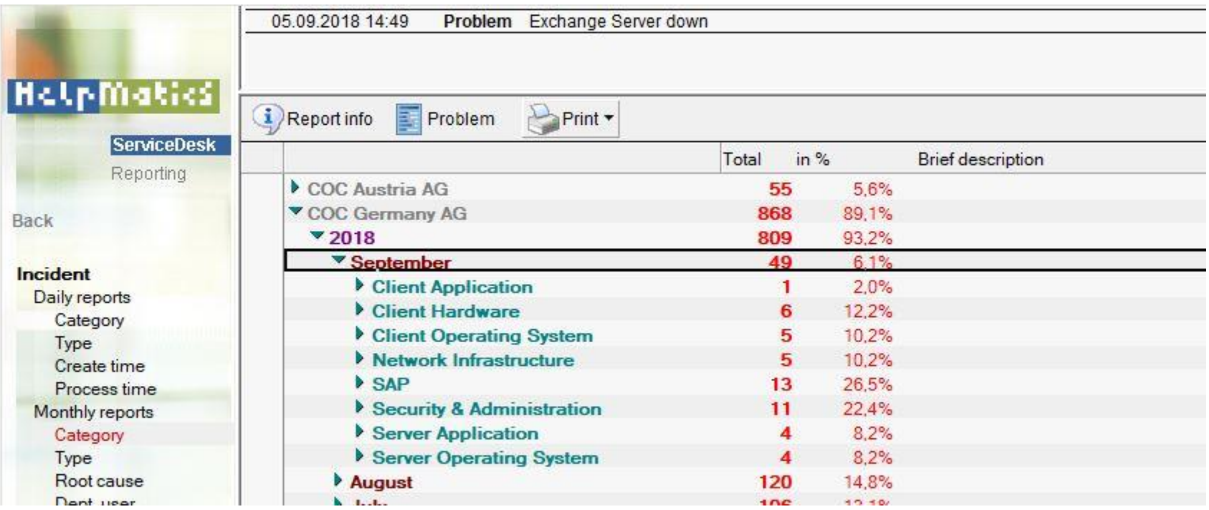


Fig. 39: Incident – Overall reports – Category

7.8.2 Graphical reports

This area permits a direct graphical representation of the ticket data within HelpMatics™. You can store reports to be reused and display the results as bar, pie or line chart.

The data is prepared at night, which optimizes the speed of the graphical representation. Although it is possible to immediately activate refreshing by clicking the Reload data button, this is only recommended in times of low server workload.

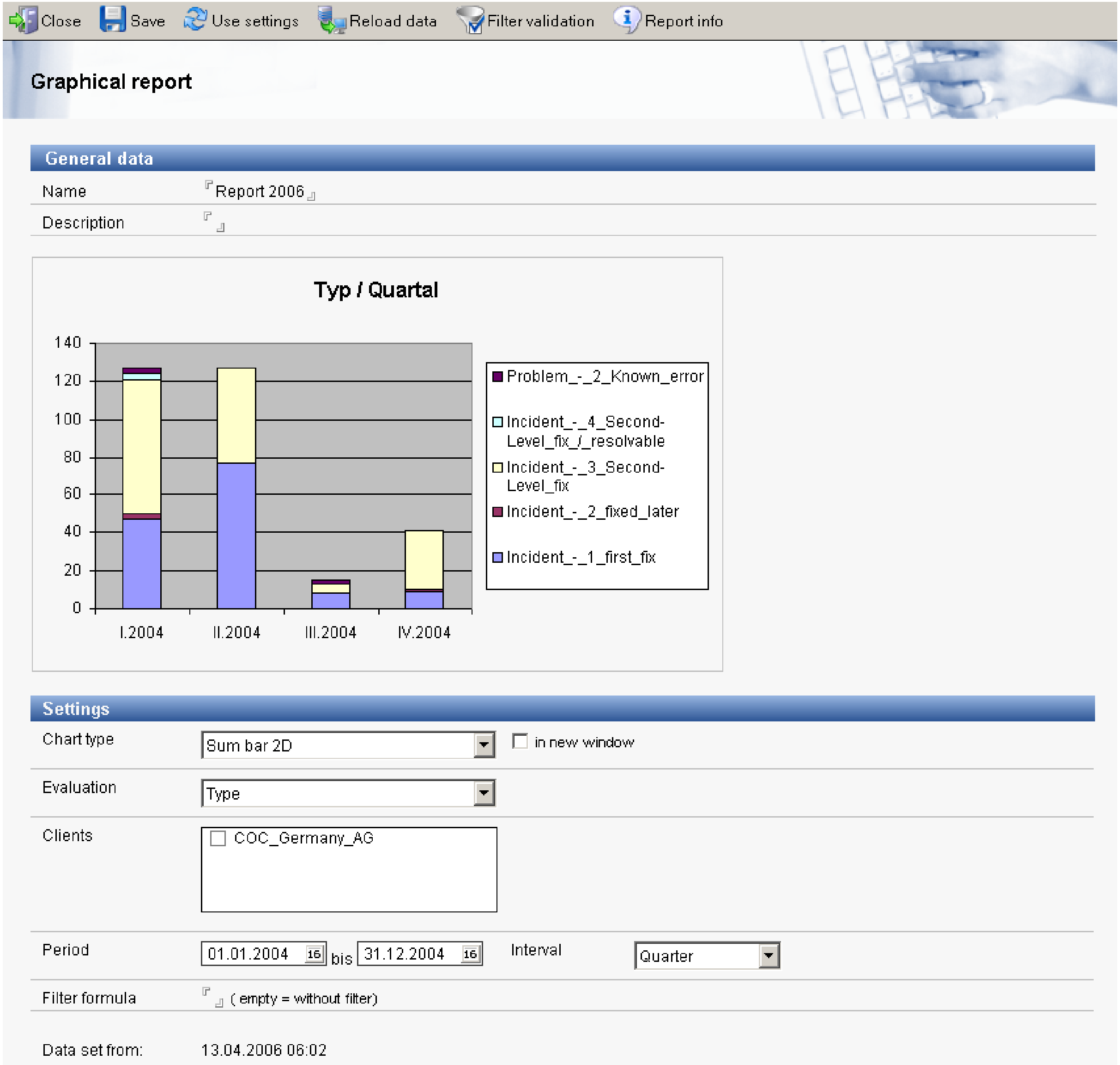


Fig. 40: Graphical representation of the overall report

How to create a new report

1. Click Report – New in the action bar of the view.
   Now you can enter name and description of the report. In the Settings area you can enter a filter formula to further restrict the selection of the tickets. For advice concerning the syntax, please refer to the HCL Notes Help under Refining a search query using operators. You can have your formula checked for correct syntax by clicking the Filter validation button.

   Some examples of valid formulae:

Field MailAddress = servicedesk@coc.ag.com
Field RespDepartment = Helpdesk
Field ProFullName Contains Huber , Maria AND Field RespDepartment Contains Helpdesk

   You will find a selection of available field names by clicking the Report info button.

   Please note: When you are using a filter formula, this filter must not return more than 5,000 documents.

   Reason: By default, the maximum number of documents allowed for a full text index is 5,000, which can be extended to 15,000 documents.

   Restrict the filter so that the number of documents returned will be below the limit. You can check the filter for the number of results e.g. in the Tickets/User view.

2. In order to load the prepared data, click Reload data. You can retrieve the last saved data set or request immediate refreshing. The new report will be saved and closed automatically.

3. Select the new report from the view and open it. Now you can make further settings:

   - Choice between different chart types
   - Output directly in Excel via the in separate window checkbox. Otherwise embedded in the report.
   - Select the client(s) you want to evaluate.
   - From the Evaluation list select a category you want to evaluate and specify the evaluation period and interval.

4. By clicking the Apply settings button the data will be represented in the form of the selected chart type.

5. After clicking Save the settings made will be kept for further use.

7.8.3 BI/ Data export

These views display all tickets together with the most important data.

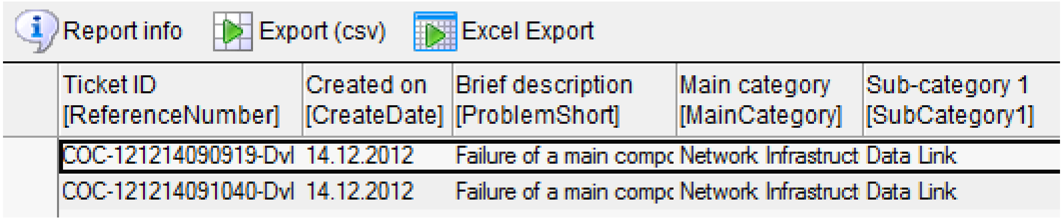


Fig. 41: Ticket view for data export

By clicking the EXPORT (CSV) button you can export the data as csv file.

Depending on the configuration under MODULES-> INTEGRATION, the Excel Export button will additionally be displayed.

By means of the Excel Export button, the data – for any selected client and period – can be exported directly to an Excel file. If you have selected several documents in the view before, these will be exported. If not, the criteria to be used will be queried in a dialog box.

The following views are available, particularly for access via ODBC:

a) Ticket data (export): General ticket data

Name:	Reporting\BI\Basic Ticket Data
Alias:	BI_BasicTicketData
Selection:	all Incident and Problem tickets
Access:	[&F_REPORTING] role is necessary
Use:	This view can be used for analyzing general ticket data. It is not suitable for analyzing the processor history or group assignment. For this, separate views are available.

b) Group assignment

Name:	Reporting\BI\Group Assignment
Alias:	BI_GroupAssignment
Selection:	all Incident and Problem tickets
Access:	[&F_REPORTING] role is necessary
Use:	This view can be used for analyzing group assignments within a ticket. Within the view, a separate entry is maintained for each group. The values of the ProGrpName field are analyzed for this. The ticket ID (ReferenceNumber) is used for linking tickets. In the ProGrpStart and ProGrpEnd fields, start and end of the assignment to the respective group are logged as date-time-value. In the ProGrpEscLevel field, the escalation status of the ticket at the end of group processing is logged.

c) Processor list

Name:	Reporting\BI\Processor History
Alias:	BI_ProcessorHistory
Selection:	all Incident and Problem tickets
Access:	[&F_REPORTING] role is necessary
Use:	This view is used for analyzing the process editors/process teams involved in a ticket. A separate entry is maintained within the view for each entry in the processor history. The values of the ProFullName multi-field are analyzed for this. The forwarding date is specified in the ProDate field (field name “assigned”). The ticket ID (ReferenceNumber) is used for linking tickets.

d) Linked Tickets

Name:	Reporting\BI\Linked tickets
Alias:	BI_LinkedTickets
Selection:	all Incident and Problem tickets that contain ticket links
Access:	[&F_REPORTING] role is necessary
Use:	This view can be used for analyzing links between tickets. A separate entry is maintained within the view for each entry in the Tickets tab. The ticket ID (Reference or Referencenumber_linked) is used for linking tickets.

e) Linked CIs

Name:	Reporting\BI\Linked CIs
Alias:	BI_LinkedTickets
Selection:	all Incident and Problem tickets that contain CI links
Access:	[&F_REPORTING] role is necessary
Use:	This view can be used for analyzing links between tickets and CIs. A separate entry is maintained within the view for each entry in the Linked CIs tab. The ticket ID (Reference) is used for linking tickets and CIs.

7.8.4 Ticket monitoring in the service cockpit 2.0

The service cockpit offers an option to show the current ticket number status

- team overview of tickets
- tickets created today
- tickets of the current and the previous month
- tickets not closed for a long term

filtered according to the department of the responsible person's and ticket client. The display is automatically refreshed, web-based and so suited for various end devices.

Exemplary link:
https://<ServerName>/<Path>/<ITSMDatabase>/xServiceCockpit.xsp?companyname=<Client>&respdepartment=<Department>

The parameters companyname (name of the client: Field CompanyName in ticket) and respdepartment (Department of the responsible person's: Field RespDepartment in Ticket) are optional.

> Note:
> This requires that the department is consistently maintained in the process editor and process team documents. Changes of the department name will affect this display.

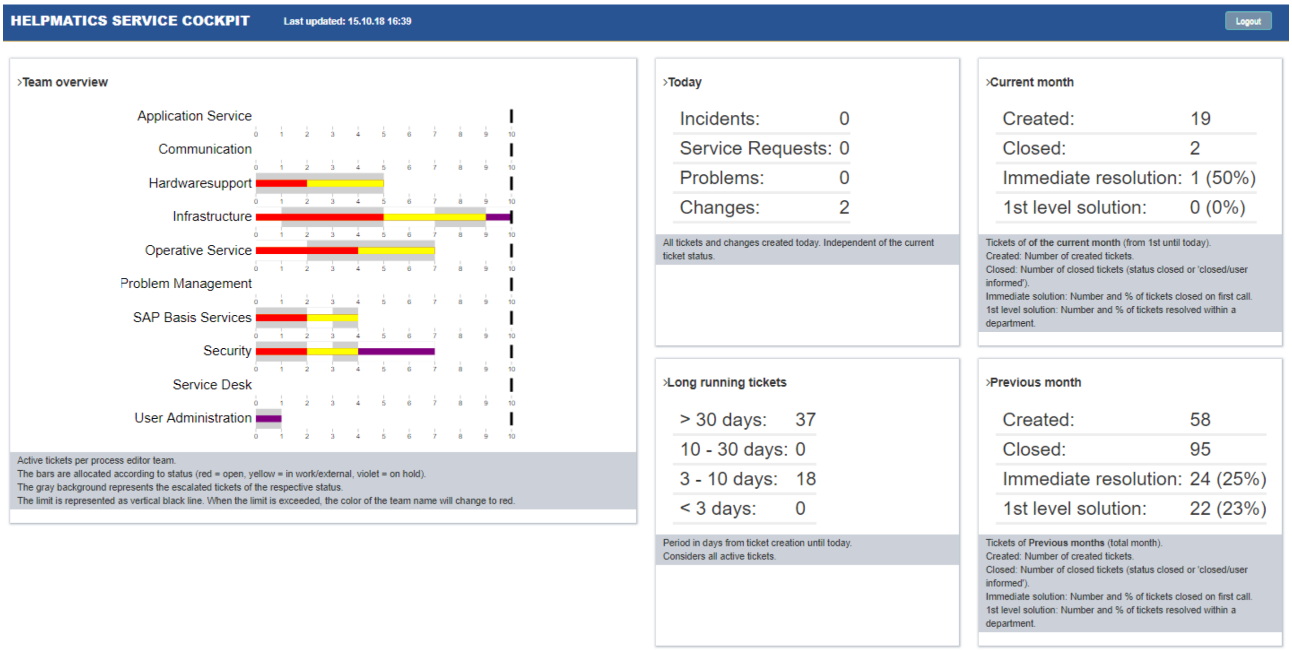


Figure 42: Ticket overview for COC department, COC AG client

You find explanations regarding the represented values at the end of each chart.

For the team overview chart, you have to define the limits for tickets in the process team document for the service cockpit display. If the number of tickets processed by the team exceeds the limit, the process team's color will change to red. The limit itself is represented as vertical black line.
The scaling is based on the highest limit value of all process teams.

7.9 HelpMatics™ Widgets

7.9.1 System requirements

When HelpMatics™ is used with HCL Notes 8.5.1 Standard, different widgets are available. These can be deployed using the known HCL Notes deployment methods (update site and widget catalog instructions).

7.9.2 HelpMatics™ One-Click Ticket

HelpMatics™ One-Click Ticket is only available when the ServiceDesk database is open.

7.9.3 HelpMatics™ FastText

HelpMatics™ FastText is available whether or not the ServiceDesk database is open.

7.9.3.1 Configuration

Configuration is set via the user preferences of the Notes client.

Enter the path to the HelpMatics™ Admin database where the text modules are managed.

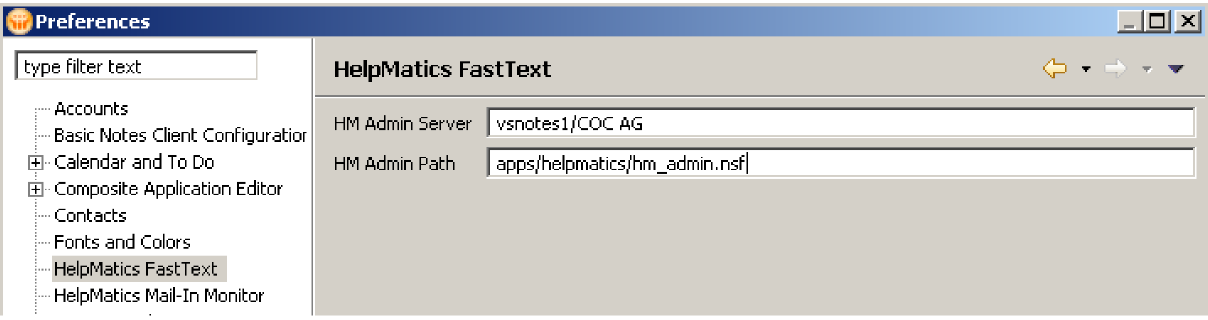


Fig. 43: Configuration of HelpMatics™ FastText

Process editors that are assigned the [&R_Manager] role in the Admin database can create publicly available text modules. These modules cannot be changed by process editors to whom this role has not been assigned.

Private text modules can be created by everyone. The entries are managed and updated via the menu or context menu. The individual text modules will be categorized according to the respective HelpMatics™ modules (ServiceDesk, Change, …).

7.9.4 HelpMatics™ Mail-In Monitor

Preferably this widget should be installed by persons monitoring the HelpMatics™ Mail-In area. The Mail-In Monitor visualizes the HelpMatics™ Mail-In area and informs the user about incoming e-mails. This widget is available whether or not the ServiceDesk database is open.

7.9.4.1 Configuration

Configuration is set via the user preferences of the Notes client.

You can define there if a popup shall appear when a new mail is received. Server and Path must be configured. The Monitoring interval is specified in minutes and determines how often the Mail-In area will be monitored for new e-mails.

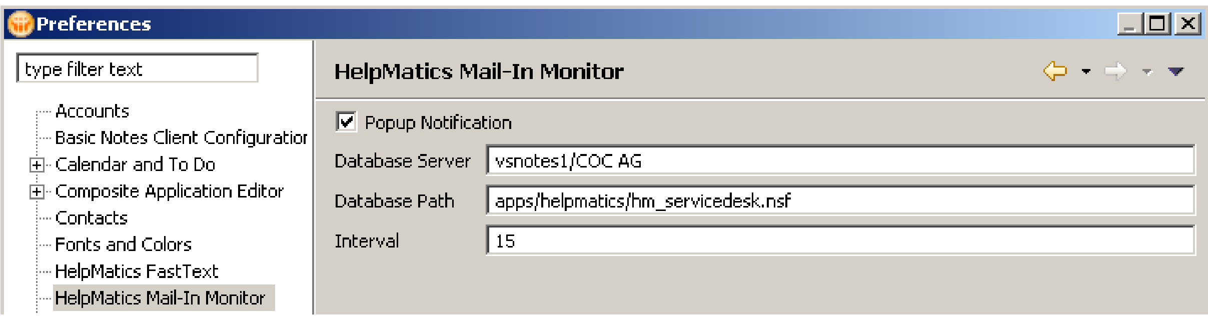


Fig. 44: HelpMatics™ Mail-In Monitor configuration

8 Administration of HelpMatics™ Knowledge

8.1 Prerequisites

Storage of the knowledge database on a HCL Domino server and full text indexing of the database are required for optimum functioning.

You will find menu entries not dealt with here in paragraph 6 Administration of HelpMatics™ - General.

8.2 Access rights

Access rights and configuration of the process editor documents are described in more detail in chapter 3.3.

8.3 FAQ categories

In order to categorize FAQ documents you can either use the categories created under ServiceDesk (see 6.3) or create your own categories here. Please note that FAQ categories always have one subcategory only.

8.4 Client

By double-clicking a client in the list you can edit his profile and provide it with an e-mail address (Notes-Info tab).

8.5 Configuration

Here you will find the basic HelpMatics™ Knowledge configuration. Please note that these settings are server-specific, i.e. this item is to be edited on each server also in case of cluster operation.

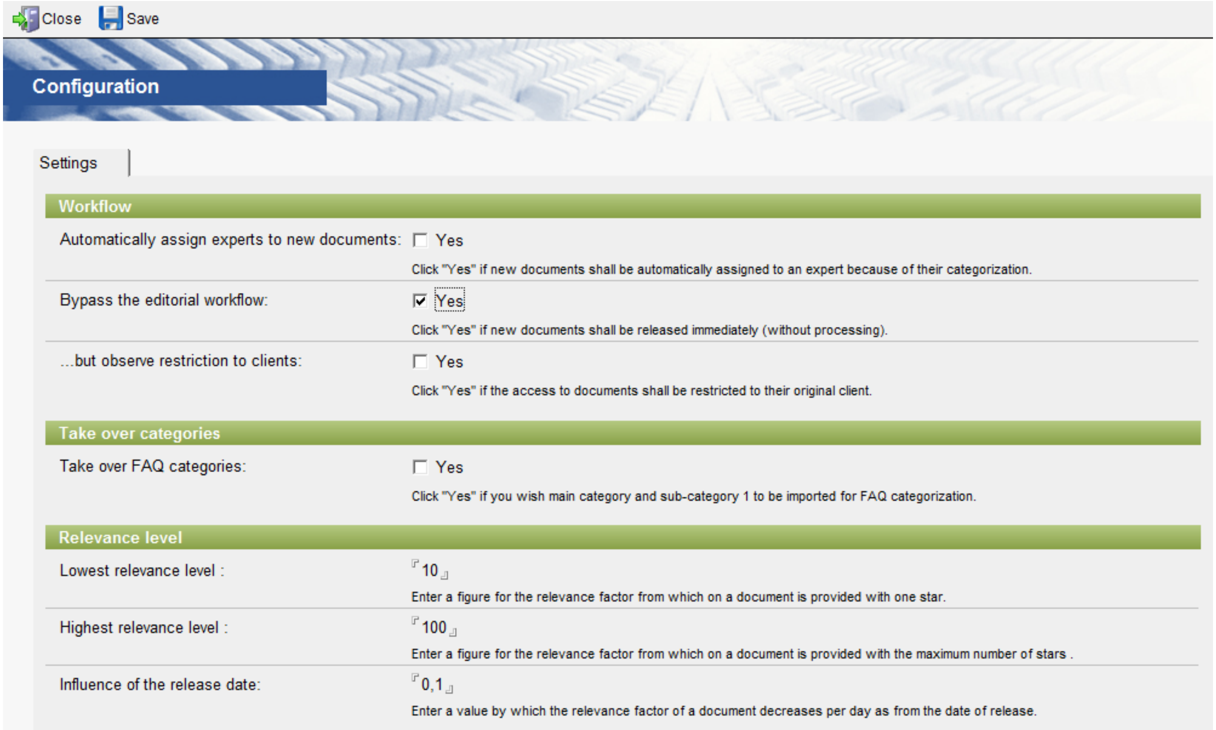


Fig. 45: Basic HelpMaticsTM Knowledge configuration

8.5.1 Automatic assignment of experts

Please activate this option if an expert shall be assigned to new Knowledge documents automatically (agent running at night).

An expert or an expert group can be entered in the categories/subcategories as default value. If an expert is preset for the lowest categorization level of a document, this expert will be transferred; otherwise, the expert of the next higher level will be transferred and so on.

This agent can also be used for selected documents from the menu.

8.5.2 Bypass the editorial workflow

Please activate this option if the editorial workflow shall be bypassed: Release of all Knowledge documents without editorial preparation for all user groups.

8.5.3 …but observe restrictions to clients

Please activate this option if multi-client capability is to be maintained in spite of bypassing the editorial workflow.

8.5.4 Take over FAQ categories

Please activate this option if the FAQ categories (main category and first subcategory) shall be imported for the FAQ categorization (at night).

Additional manually created entries will be marked with an X in the *man.* column.

8.5.5 Lowest relevance level

Enter a figure from which on the document is to be provided with one star . The number refers to the relevance factor of a document. The relevance factor is calculated from read count, use count and up-to-dateness.

8.5.6 Highest relevance level

Enter a figure for the relevance factor from which on the documents are provided with the maximum number of stars.

8.5.7 Influence of the release date

Enter a value by which the relevance factor of a document decreases per day as from the date of release.

Relevance factor points are assigned in the following way:

- 1 point per call in the Notes client (solution, FAQ)
- 6 points per use in the Notes client (solution, FAQ)
- 1 point per call in the Web client (FAQ)
- 4 points per positive rating in the Web client (FAQ)
- 2 points deduction per negative rating in the Web client (FAQ)

8.6 Reporting

Only knowledge managers have access to knowledge reporting. The following views are available:

View	Description
Use	This view gives an overview of the frequency of use of the individual knowledge documents. ▪ Read count: How often has the document been opened since its release? ▪ Use count: How often has the document been used for a solution of a request in HelpMatics™ ServiceDesk since its release? (also see the outline relating to relevance) ▪ Last access: When was the last user access (read or use)?
Release	This view displays the user groups for which the knowledge documents have been released. If a document has been released for more than one group, it is found under each of these groups.
Portal	This view gives an overview of the frequency of use of the FAQ documents in the user portal. The following properties relate to portal access: ▪ Read: How often has the document been opened since its release? ▪ Pos.: How often has the document been rated positively? ▪ Neg.: How often has the document been rated negatively? ▪ Access: When was the last user access to the portal?

9 Administration of HelpMatics™ Change

9.1 Prerequisites

The optimal use of the search function requires full text indexing of the database.

The Allow locking documents database property must be activated.

9.2 Access rights

In chapter 3.4 the HelpMatics™ Change settings and rights are described.

9.3 Navigation

By clicking Administration in the main navigator of HelpMatics™ Change you open the administration navigator.

By clicking BACK you return to the main menu.

> Note
> You will get this selection only if you are granted the respective rights.

You can make all administrative settings for HelpMatics™ Change there.

Apart from the administration of the process editors you can specify categorizations, provide templates for web requests, RFCs and Changes as well as print templates.

You will find menu entries not dealt with here in paragraph 6 Administration of HelpMatics™ - General.

9.4 Categories

- Validation

Specify the values to be available for the RFC or Change checkboxes (priority, consequences, risk, business relevance and urgency) and in the Task (type, rating criteria) here.

Enter the individual values, separated by vertical spacing.

As concerns priority, please note that for the first three values of the list the icons are assigned in the order high, normal, low (see chapter 5.3). An icon is not assigned for values that might follow.

The fields of impact, risk, business relevance and urgency can be mandatory fields, optional fields or be hidden.

Concerning the rating criteria, a value can be defined for cancelation of workflow (e.g. Not ok) and several values for continuation of workflow.

9.5 Templates

9.5.1 Web request form

Create a web request form to enable the user to request RFCs via a web form.

With the WEB REQUEST FORM - NEW button you can add a new web request form.

Double-click on a web request form in the list to edit it.

The web link will automatically be generated and can be made available to any user for entering ideas and change requests. Among others, the change manager to be notified, field descriptions and mandatory fields are defined in the web form.

It is possible to create an attachment. It should be pointed out that several files can be attached as a ZIP file.

Mandatory fields are colored in the web form.

Fig. 46: Web request form

General tab

Apart from general definitions you store the basic configuration settings here.

- You indicate the Change Manager as responsible person.
- The web request form must be integrated into a HelpMatics™ portal. For configuration of the user portal, proceed as described in chapt. 6.6.1 .
  The web request form can be called within a user portal or directly be addressed via the Solo links. You find the Solo links in the portal definition of the user portal or under Administration-Portal-Web request in HelpMatics™ Change.
- In addition you can determine whether a standard change is to be created when a web request is sent. In this case the user is offered optional tasks in the web request form in addition.
- If the restriction to user departments is activated, only logged-on users of this department will see this web request in the web portal.

Requester

Define which of the requester's data shall be visible in the web request and if this data should be changeable.

Determine which of the requester's or reporter's data is to be visible in the request and if this input is to be mandatory. A distinction between requester and reporter data is only made if the REQUESTER = REPORTER (texts can be configured) option is deactivated in the request. In this case the reporter is the user who is logged in when the request is filled in. If the ALLOW MANUAL INPUT OF REQUESTER DATA BY REPORTER option is deactivated, the requester has to be set and selected in a dialog.

Form field tab

In the form field tab 15 user configurable fields are available.

Description fields, Costs, Mail templates tab

The following tabs provide other fields. In addition you can store e-mail templates for sending confirmation notifications.

9.5.2 RFC, Change and Release

9.5.2.1 General information

In addition to name and brief description, you can add to the template as many pieces of information and tasks as you want in order to characterize recurring RFC/Change or Release types in more detail.

Based on an available template you can quickly define a similar workflow via the copy function.

9.5.2.2 Special information on Change templates

Change templates can be categorized into standard changes, normal changes and emergency changes.

A Change template can be characterized as Standard Change, i.e. as frequently recurring Change with a predefined procedure. For this Change type the “Autoclose” function can be activated. When all tasks are completed, this Change will automatically be closed.

Standard changes can be initiated by 1st level team members and will immediately obtain the Processing Active status. (Please note: This role must be assigned to the user in the access control list of the Change module and, if necessary, also in the ServiceDesk module).

- Specification of a carrier ticket template:
  If a Standard Change is created in HelpMatics™ ServiceDesk from the Resources – User or Resources – Config. item view, a carrier ticket will automatically be created for this Change in HelpMatics™ ServiceDesk under the following conditions:
    - only 1 document is selected in the view (a user or configuration item document).
    - a carrier ticket template is stored in the Change template selected for the Change creation.

  The carrier ticket will be created in the background when the new, saved Change is closed.

- Optional tasks in Change templates:
  The setting specifying if the task is optional for the Change can be modified for the individual tasks.
  Select one of the following properties:
  - REGULAR TASK: a task that cannot be used optionally.
  - OPTIONAL TASK: the task is offered as optional task for creating the change.
  - DEPENDING ON: Select a task here. Select from optional tasks. If a change is created on the basis of a template and an optional task is used, all tasks depending on this task will be inserted as well.
  In the change template the tasks are marked by a **?** (blue) character for optional tasks and **?** (gray) for dependent tasks.
  Please note: When you set an optional task to "regular", you might have to edit dependent tasks manually and, if applicable, newly define the dependency on an optional task or to change to OPTIONAL TASK.
  The appropriate configuration of the web request form (9.5.1) provided, OPTIONAL TASKS can be offered to the user for selection. To do so, make some settings in the tab WEB REQUEST FORM:
  - If required, you can enter a differing display text in the template. If this field is empty, the task short description is shown.
  - If additional information is required by the user for the selection of the task, an additional field can be defined with ADDITIONAL FIELD labeling. If a selection field is concerned, the ADDITIONAL FIELD SELECTION values can be entered here separated by vertical spacing. If additional options are required for selection, these selection values will be entered into the accessory selection values field.
- Cancelation conditions in Change Templates:
  The cancelation condition for validation defined under Categories->Validation can be activated there for individual tasks.
- Activate synchronization of tasks with task template:
  Tasks created on the basis of a task template have a synchronize with template radio button. If this radio button is activated, changes to the task template will be transferred into the task provided that, when saving the task template change, the RFC/Change template has been selected for taking over the Change. In the task overview, tasks for which Synchronize with template has been activated are identified by the icon.
- Program execution
  Store an (automatic) program execution for each single task.

  Use cases:
  - Deactivate process editor
  - Send mail automatically
  - Execute Powershell script
  - Link CIs subsequently
  - Start CI Import

  Some automatisms are pre-defined under execution control. These execution controls are examples that have be customized and adapted to the individual requirements. This checkbox is the interface for further automatisms that can be created individually, if required.

  As for EXECUTION TIME, enter the period of time available for the background process because the execution might block the client.

  LOG PATH allows you to enter a path used for the execution of a command or in an individually created agent.

  As soon as AUTOMATIC EXECUTION has been activated, the task will be identified in the workflow overview by the icon. As regards these tasks, the process editor will only be notified in case of an error. The execution is triggered periodically in the background until the automatism reports a successful execution or the end of the calculated task period has been reached (DEADLINE).

Click EDIT to enter a command and other necessary parameters.
An input window opens where you store execution information for the automatism:

- POWERSHELL EXECUTION: Specify the Powershell-Script to be executed with parameters. You can enter fields from the change document as variables.
- DEACTIVATE PROCESS EDITOR: In the change document, specify the field name containing the process editor to be deactivated (e.g. Requesterfullname).
- CMS-IMPORT: requires the ID of the import to be executed and, if applicable, a CI-ID in the format:
  -importname IMPAAUR-A5VGNZ -LinkedCIID <ParentCIIDsLinked>
- SIGN DATABASE: Enter the path to the database.

If errors occur during program execution, these will be documented in the PROGRAMM tab of the task. The task editor will be informed when the execution period of the automatic task has been exceeded or a critical error occurred. In these cases, manual task editing is necessary to activate the workflow again.

Quick Changes can be used for quickly documenting Changes. Activate the Quick Change option in a Standard or Emergency template. Quick Change templates may contain only one task.

9.5.3 Task

You can create your own templates in order not to have to record often recurring tasks again and again. Their use can be restricted to RFCs, Changes or Releases or be made available for all of them.

- For the process editor also the placeholders <ChangeManager>, <Sponsor>, <Requester> or <Executor> can be selected. Only valid HelpMatics™ process editors and process teams, however, will be replaced.
  The <supervisor> placeholder will be set when a web-task editor (PROCESS EDITOR (MANUAL, WEB-TASK)) is assigned: here you can choose between manual input and supervisor. <Supervisor> will be replaced with the supervisor selected in the web request (note: should be defined as mandatory field in the web request form if the placeholder is used in the connected change template).
- With rights restricted activated, the task can only be edited if
  - the process editor stored for the task is identical with the logged in user
  - the logged in user is a member of the process team stored for the task
  - the logged in user has change manager rights
- Tasks can be marked as optional: When using a Change template with optional tasks, these tasks will be offered for selection when creating a new task.
  As soon as the task template is used in a Change template, this setting can be extended, see chapter 9.5.2.2
- The cancelation condition for validation defined under Categories->Validation can be activated there for individual tasks.
- For execution of programs refer to 9.5.2.2
- Synchronization of tasks created from task templates.
  Changes to task templates will be transferred to existing RFC/Change templates in a controlled way. Is a task template changed, the user, when saving, will be requested to select those RFC/Change templates, which the change is to be transferred to.
  The selection list contains only RFC/Change templates in which there are tasks that were created on the basis of the changed task template provided that the Synchronize with template radio button is activated in the task concerned.

9.5.4 Service level

(Also see 7.3.1)

Target working hours and service times (both under the SERVICE TIMES tab) in the service level templates are relevant to the Change module. They are used for calculating end date and process times.

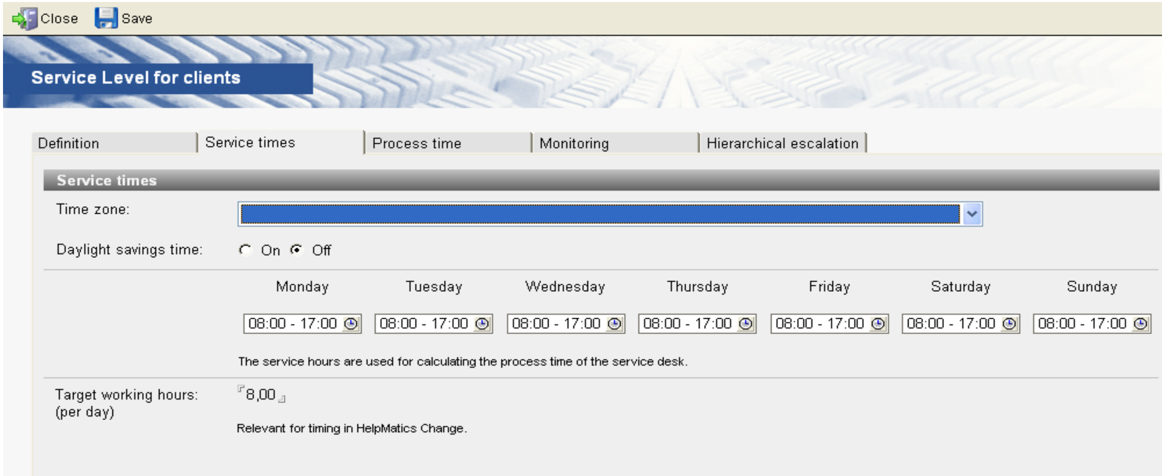


Fig. 47: Service level (service times and target working hours)

9.5.5 Print

Print templates are available if configured accordingly under Modules->Integration. For details, refer to the HelpMatics™ Admin documentation.

The following print templates are available for selection: Web request, RFC, Change and Task.

RFC and Change print templates may additionally include templates for printing tasks. Via Attach task data you can specify that the Change or RFC and all tasks relating to it will be printed when such a template is selected.

You can provide any Word template with book marks whose names are identical with the field names in HelpMatics™ Change. Insert this template as an attachment in a new print template.

If you press the print button in the RFC or Change document or if you select Print > Document in the Viewer, you will be requested to select one of the print templates created under Templates > Print.

In the following you will find a selection of field names the contents of which can be transferred into a Word document by defining a book mark of the same name.

Description	Field name
Client name	CompanyName
RFC or Change ID	ReferenceNumber
Brief description	BriefDescription
Description	Description
Date of creation	CreateDate
Change Manager	CmFullname
Change manager’s e-mail address	CmMailaddress
Change manager’s phone	CmPhone
Change manager’s cost center	CmCostCentre
Change manager’s department	CmDepartment
Change manager’s location	CmLocation

Change manager's comment	CmComment
Requester	RequesterFullname
Sponsor	SponsorFullname
Executor	ExecutorFullname
Status	Status

You can use, among others, the following DocVariable fields in the tasks:

Description	**DocVariable name**
Task editor	ProFullName
Brief description	BriefDescription
Description	Description
Processing	Comment
Status	Status

9.6 Clients

9.6.1 Archiving

Archiving for closed RFCs/Changes/Releases is configured for each client and with the desired interval. Only documents that have been closed since the period specified in days will be archived.

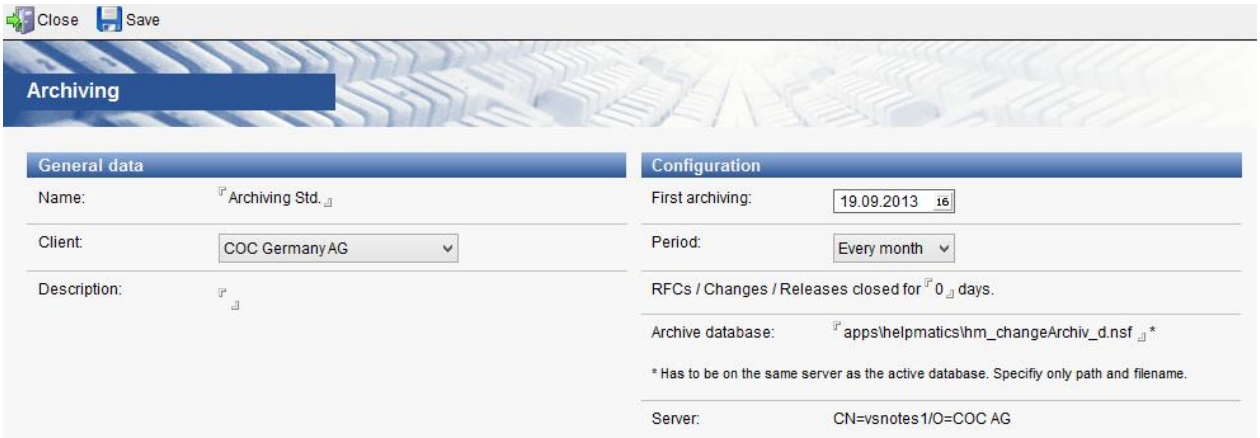


Fig. 48: Archiving settings for closed RFCs/Changes/Releases

9.7 Modules

Here links to other modules are stored. Please note that these settings are server-specific, i.e. this item is to be edited on each server also in case of cluster operation.

In the Process info tab the notification history upon completion of a Change is displayed.

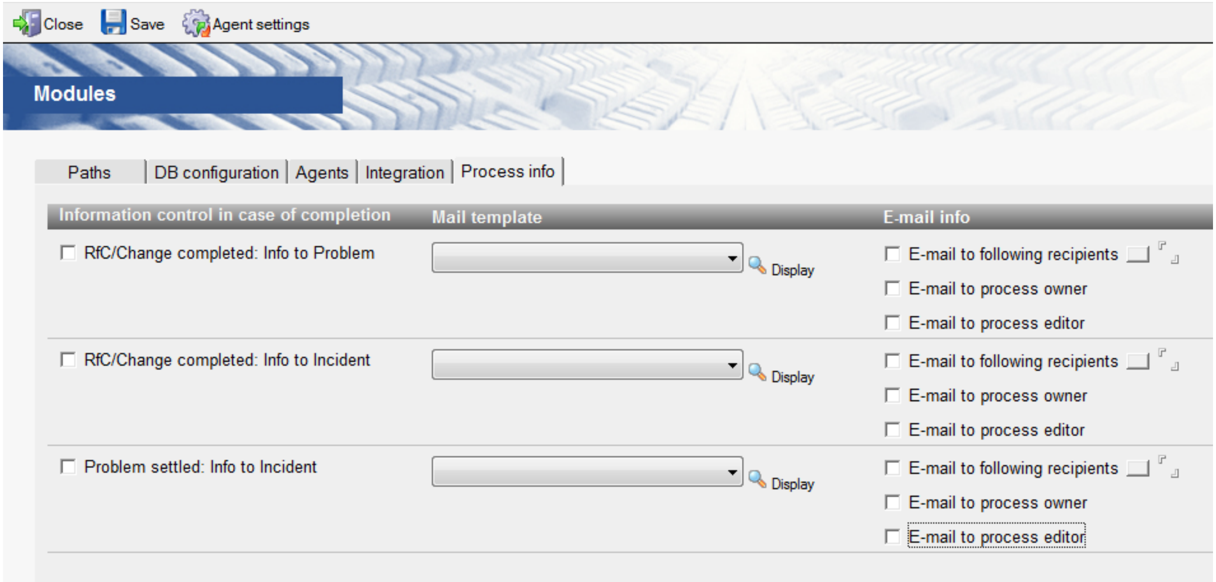


Fig. 49: Process information in case of completion

The notification can be made in three levels:

- RFC/Change completed -> Info to Problem
- RFC/Change completed -> Info to Incident
- Problem settled -> Info to Incident

9.8 Reporting

Various statistical analyses are available for RFCs, Changes, Releases and Tasks.
The following views under Reporting – BI-Views shall be used especially for access via ODBC:

a) Changes

Name:	(Reporting\BI\Changes)
Alias:	vReportChangeBI
Selection:	all Changes
Access:	[&F_REPORTING] role is necessary
Use:	This view can be used for analyzing general Change data.

Corresponding views are available for Releases, RFCs and Tasks.

b) Linked CIs

Name:	(Reporting\BI\linkedCIs)
Alias:	vReportLinkedCIsBI
Selection:	all Changes/RFCs that contain links to CIs
Access:	[&F_REPORTING] role is necessary

Use:	This view can be used for analyzing links between Changes/RFCs and CIs. For each entry in the config. items tab a separate entry is maintained within the view. A link can be established via the Change/RFC ID (Reference).

c) Linked Tickets

Name:	(Reporting\BI\linkedTickets)
Alias:	vReportLinkedTicketsBI
Selection:	all Changes/RFCs that contain links to tickets
Access:	[&F_REPORTING] role is necessary
Use:	This view can be used for analyzing links between Changes/RFCs and tickets. A separate entry is maintained within the view for each entry in the Tickets tab. A link can be established via the Change/RFC ID (Reference).

d) Linked RFCs/Changes

Name:	(Reporting\BI\linkedRFCsChanges)
Alias:	vReportLinkedRfCsChangesBI
Selection:	all Releases that contain links to RFCs/Changes
Access:	[&F_REPORTING] role is necessary
Use:	This view can be used for analyzing links between Releases and Changes/RFCs. A separate entry is maintained within the view for each entry in the RFCs/Changes tab. A link to further Release data in the (Reporting/BI/Releases) view can be established via the Release ID (Reference).

10 Interfaces

10.1 Web service for creation and update of Incident tickets

Incident tickets can be created and updated automatically by calling a web service. This also allows you to obtain ticket data on the basis of the ticket ID. The web service integrated in HelpMatics™ provides three functions: CREATEINCIDENT, GETINCIDENTDATA, UPDATEINCIDENT.

Tickets with status SCHEDULED can neither be created using the Web service nor updated.

The web service is located in the HelpMatics™ portal database.
The WSDL file is called via the following link:

http://<ServerName>/<Path>/<PortalDatabase>.nsf/IncidentHandler?wsdl

<ServerName>	Server name
<Path>	Path to the HelpMatics™ portal database
<PortalDatabase>	File name of the portal database

10.1.1 Getting data on individual Incident tickets

When you enter a valid ticket ID, the GETINCIDENTDATA function will return the following values of a ticket:

Ticket ID	Subcategory 1	Priority
User ID	Subcategory 2	Name of the responsible person/team
CIID	Type	Process editor's name
Brief description	Root cause	Request
Main category	Status	Solution

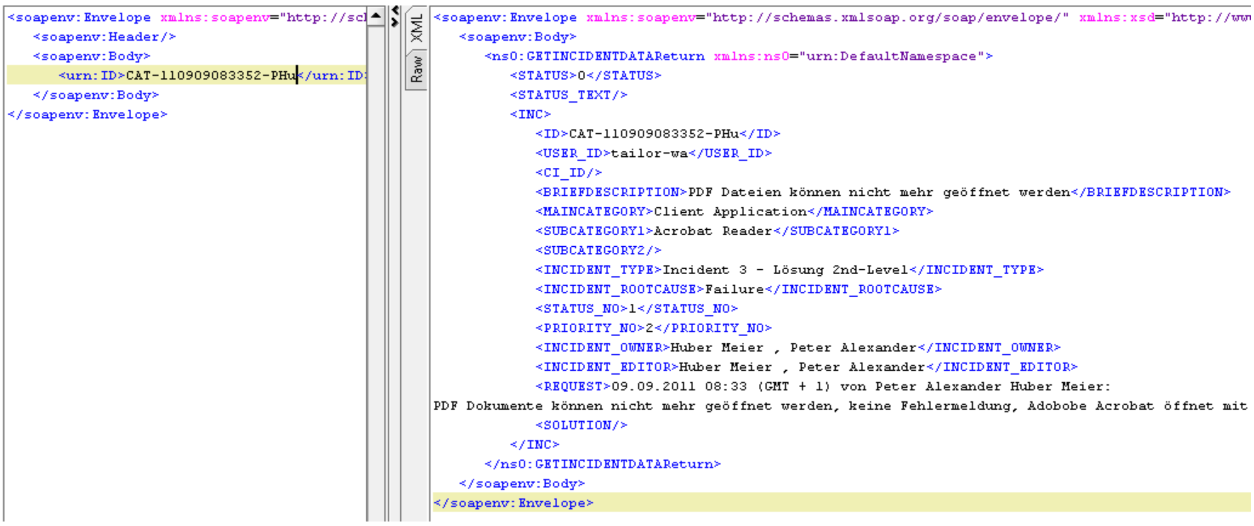


Fig. 50: Example of GETINCIDENTDATA

For status and priority, numerical values will be returned. For help concerning assignments, refer to the tables below or the service level document (HelpMatics™ Administration, Templates -> ServiceLevel).

Priority	Icon	Meaning	Numerical value
Priority 1		Suggestion: asap	5
Priority 2		Suggestion: very high	4
Priority 3		Suggestion: high	3
Priority 4		Suggestion: Standard	2
Priority 5		Suggestion: low	1

The priorities are defined in the client's service level document.

Status	Icon	Numerical value
closed		5
work in progress		2
open		1
on hold		4
external		3

10.1.2 Creating Incident tickets

Incidents are created by using the CREATEINCIDENT function.

The incident will only be created successfully if valid data has been entered and all mandatory fields have been filled.

UserID / CIID:

- Valid userID (especially for users) or CIID (for all other CI types)
- UserID or CIID is a mandatory field

Brief description:

- Mandatory field

Category:

- Valid category incl. valid subcategories
- Mandatory field

Type: <INCIDENT_TYPE>:

- Valid type
- Mandatory field

Root cause: <INCIDENT_ROOTCAUSE>:

- Valid root cause
- Mandatory field

Status: <STATUS_NO>:

- No mandatory field; if status field is empty, Open will be used as default status value
- If status is used, it will be displayed as a numerical value (see table in chapter 10.1.1)

Priority: <PRIORITY_NO>:

- No mandatory field; if priority field is empty, the default priority will be used. This priority can be overwritten by a priority specified for a user.
- If priority is used, it will be displayed as a numerical value (see table in chapter 10.1.1)

Responsible person/team: <INCIDENT_OWNER>:

- Mandatory field in the form of last name, first name

Editor: <INCIDENT_EDITOR>:

- Mandatory field in the form of last name, first name

HELPMATICS™ CMS ENTERPRISE:

Service <SERVICE_CIID>:

- CIID of a service

Notification sent to the user during ticket creation <SENDINFOMAILTOUSER>:

Basically, the settings for sending mails to users are mandatory in the client document. User notification can be activated or deactivated here. If a ticket is created with status CLOSED, the final mail message will be sent.
Transfer value “1” -> Send e-mail to user
Transfer value “0“ -> Do not send e-mail to user

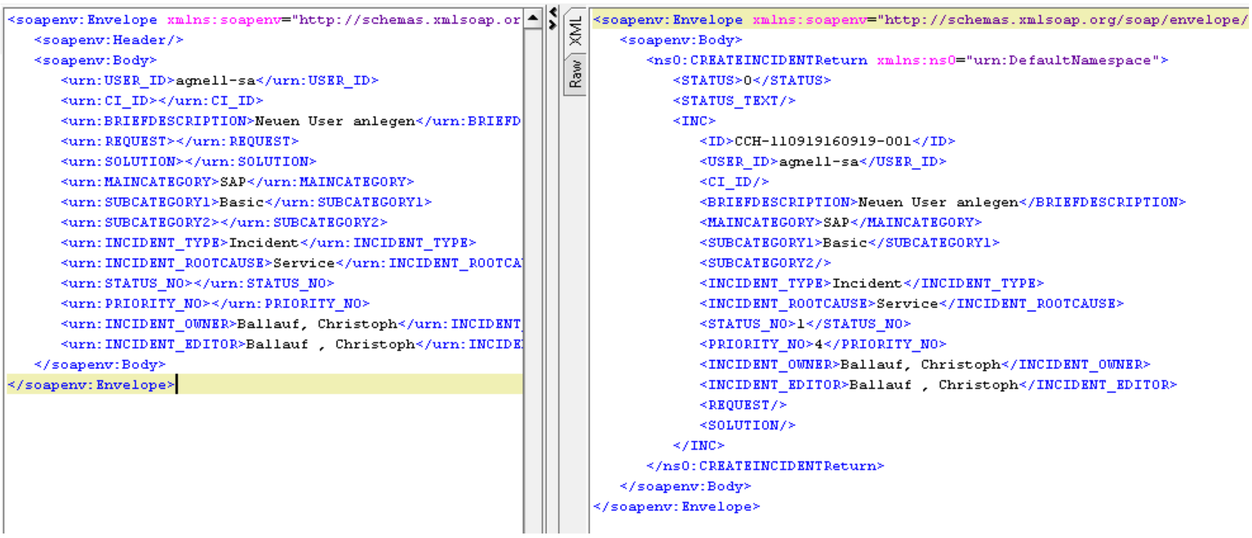


Fig. 51: Example of CREATEINCIDENT

10.1.3 Updating Incident tickets

Tickets are updated by using the UPDATEINCIDENT function. A valid ticket ID with <ID> parameter must be entered.

Only filled parameters will overwrite values in the ticket. Empty values will not cause any changes. Therefore, fields of an Incident ticket cannot be emptied. Please take care here as well that valid values are entered (see description on how to create tickets).

Incident tickets with Closed status cannot be updated.


```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/er
   <soapenv:Header/>
   <soapenv:Body>
      <urn:ID>CCH-110919160919-001</urn:ID>
      <urn:USER_ID></urn:USER_ID>
      <urn:CI_ID></urn:CI_ID>
      <urn:BRIEFDESCRIPTION>Neue User anlegen</urn:BRIEFDESCRIPTIO
      <urn:REQUEST></urn:REQUEST>
      <urn:SOLUTION></urn:SOLUTION>
      <urn:MAINCATEGORY></urn:MAINCATEGORY>
      <urn:SUBCATEGORY1></urn:SUBCATEGORY1>
      <urn:SUBCATEGORY2></urn:SUBCATEGORY2>
      <urn:INCIDENT_TYPE></urn:INCIDENT_TYPE>
      <urn:INCIDENT_ROOTCAUSE></urn:INCIDENT_ROOTCAUSE>
      <urn:STATUS_NO></urn:STATUS_NO>
      <urn:PRIORITY_NO>3</urn:PRIORITY_NO>
      <urn:INCIDENT_OWNER> </urn:INCIDENT_OWNER>
      <urn:INCIDENT_EDITOR></urn:INCIDENT_EDITOR>
   </soapenv:Body>
</soapenv:Envelope>
```

```xml
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" x
   <soapenv:Body>
      <ns0:UPDATEINCIDENTReturn xmlns:ns0="urn:DefaultNamespace">
         <STATUS>0</STATUS>
         <STATUS_TEXT/>
         <INC>
            <ID>CCH-110919160919-001</ID>
            <USER_ID>agnell-sa</USER_ID>
            <CI_ID/>
            <BRIEFDESCRIPTION>Neue User anlegen</BRIEFDESCRIPTION>
            <MAINCATEGORY>SAP</MAINCATEGORY>
            <SUBCATEGORY1>Basic</SUBCATEGORY1>
            <SUBCATEGORY2/>
            <INCIDENT_TYPE>Incident</INCIDENT_TYPE>
            <INCIDENT_ROOTCAUSE>Service</INCIDENT_ROOTCAUSE>
            <STATUS_NO>1</STATUS_NO>
            <PRIORITY_NO>3</PRIORITY_NO>
            <INCIDENT_OWNER>Ballauf, Christoph</INCIDENT_OWNER>
            <INCIDENT_EDITOR>Ballauf , Christoph</INCIDENT_EDITOR>
            <REQUEST/>
            <SOLUTION/>
         </INC>
      </ns0:UPDATEINCIDENTReturn>
   </soapenv:Body>
</soapenv:Envelope>
```


Fig. 52: Example of UPDATEINCIDENT

10.1.4 Status updates returned by the web service

The web service does not only return the created/changed document but also status updates.

<STATUS> and <STATUS_TEXT> indicate if the process has been completed successfully.

<STATUS> yields a numerical value. If the value is > 0, an error occurred and <STATUS_TEXT> shows the corresponding message.

10.2 Web service for creating a Change

Change tickets can be created and updated automatically by calling a web service. This also allows you to retrieve the current status on the basis of the Change ID. The web service integrated in HelpMatics™ provides the following functions:

GETTEMPLATES	Retrieves a list of standard Change templates released for web service.
GETOPTIONALTASKS	Retrieves a list of optional tasks concerning a standard Change template.
CREATECHANGE	Creates of a Change specifying a template Template data can be overwritten by transferring parameters. Selected optional tasks can be added.
GETSTATUS	Queries the Change status

The web service is located in the HelpMatics™ portal database.
You'll get to the download of the WSDL file via the following link:

http://<ServerName>/<Path>/<PortalDatabase>.nsf/ChangeHandler
The WSDL file can be displayed directly via the following link:
http://<ServerName>/<Path>/<PortalDatabase>.nsf/ChangeHandler?wsdl

<ServerName>	Server name
<Path>	Path to the HelpMatics™ portal database
<PortalDatabase>	File name of the portal database

10.2.1 Retrieving a list of available Change templates

Via the GETTEMPLATES function a list of available standard Change templates with the following attributes is retrieved:

- Name
- Main category
- Subcategory 1
- Subcategory 2
- Brief description

When calling the list, you can define main category, subcategories 1 and 2 as filter criteria.
Example:

```
<soapenv:Envelope xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/" xmlns:urn="urn:DefaultNamespace">
  <soapenv:Header/>
  <soapenv:Body>
    <urn:MAINCAT>Hardware</urn:MAINCAT>
    <urn:SUBCAT1></urn:SUBCAT1>
    <urn:SUBCAT2></urn:SUBCAT2>
  </soapenv:Body>
</soapenv:Envelope>
```

If no released template that matches the filter criteria is found, no templates available will be returned as status text.

10.2.2 Retrieving a list of available optional tasks

To obtain a list of available optional tasks, call the GETOPTIONALTASKS function with a valid template name.
The list of optional tasks contains task ID and brief description. If an invalid template name was entered, status 5001 with status text Could not find template is returned.

10.2.3 Creating Change tickets

Standard Changes are created by using the CREATECHANGE function.
A Change can only be created successfully if valid data has been entered.
Mandatory entry:

TEMPLATE_NAME	Name of a standard Change template that has been released for webs service (Availability in module).

Other mandatory fields (see HelpMatics™ Change user manual) are either covered by the template or must be transferred as parameters.

Optional data (allows values of the template to be overwritten):

CM_FULLNAME	Name of the Change Manager in the format <last name> , <first name>or [<process team>] If the value corresponds to a process editor, settings from the process editor document will additionally be transferred.
CM_MAIL	Change Manager's e-mail address If this address is clearly assigned to a user (CI), fields of the User CI will additionally be transferred (_Mail has priority over _Fullname as key). If only _Mail and no _Full name is transferred, the contact person must be identifiable in the CMS; otherwise the creation of a Change will be refused.
REQUESTER_FULLNAME	Requester's name (also see CM_FULLNAME)
REQUESTER _MAIL	Requester's e-mail address (also see CM_ MAIL) A link to the identifiable user CI will be created.
EXECUTOR_FULLNAME	Executor's name (also see CM_FULLNAME)
EXECUTOR_MAIL	Executor's e-mail address (also see CM_ MAIL)
SPONSOR_FULLNAME	Sponsor's name (also see CM_FULLNAME)
SPONSOR_MAIL	Sponsor's e-mail address (also see CM_ MAIL)
CARRIERTICKETOWNER_ FULLNAME	Name of the person/team responsible for the carrier ticket
MAINCATEGORY	Valid main category
SUBCATEGORY1	Valid subcategory 1
SUBCATEGORY2	Valid subcategory 2
CHANGE_TYPE	Valid type
CHANGE_PRIORITY	Priority
CHANGE_URGENCY	Urgency
CHANGE_IMPACT	Impact
CHANGE_ BUSINESSRELEVANCE	Business relevance
CHANGE_RISKLEVEL	Risk
DOCLINKSERVER	Notes document to be linked: Server name
DOCLINKDBPATH	Notes document to be linked: Database path
DOCLINKUNID	Notes document to be linked: Universal ID
BRIEFDESCRIPTION	Brief description
DESCRIPTION	Description
FIELDVALUEPAIRS	Any field name-field content pairs in the format #field name1#field content1#~#field name2#field content2#...

OPTTASKS	Task IDs of the optional tasks to be added, separated by @ (if the Change template used only contains optional tasks, at least one task ID must be entered).

10.2.4 Retrieving the status of a Change ticket

If a valid ticket ID is transferred, the GETSTATUS function will return the current status of the Change ticket. The value returned is a status number:

Status	Status number
Draft	0
new	1
processing: active	2
processing completed	3
reviewed	4
processing: on hold	7
closed	20
canceled/rejected	22

If the Change cannot be found, -9000 will be returned.
In case of an error, the error code with description will be returned.

10.3 Web service for access to CI data

CI data can be retrieved via web service. You'll get to the download of the WSDL file via the following link:
http://<ServerName>/<Path>/<PortalDatabase>.nsf/CmsHandler
The WSDL file can be displayed directly via the following link:
http://<ServerName>/<Path>/<PortalDatabase>.nsf/CmsHandler?wsdl

<ServerName>	Server name
<Path>	Path to the HelpMatics™ portal database
<PortalDatabase>	File name of the portal database

All CI data are retrieved via the getAllCIs function. CIs filtered according to type are retrieved via the getCis function with type (US, HW, …) being specified.
The functions return the standard CI data. Field values configured individually are not considered.

10.4 Interfaces for reporting

Besides the reporting options within Notes and the reporting functions of HelpMatics™ there is also the option to access HelpMatics™ screens and views via the database interface ODBC (Open Database Connectivity).

10.4.1 Views

To facilitate access to evaluation relevant data, special views are available that are described in detail in the Reporting chapter of the individual modules (Name: Reporting\BI\...).

10.4.2 Configuration of ODBC access

In order to have access to Notes databases from other applications (e.g. Excel, Access, Crystal Report), a NotesSQL driver has to be installed. This driver can be downloaded for free via the HCL download section.

After successful installation of the Notes SQL driver, the NotesSQL Authentication List Manager is to be called via the Nsql_ALM.exe file located in the installation directory of NotesSQL. Here, the path to the Notes.ini configuration file as well as the users accessing Notes are stored.

For ODBC access via NotesSQL, the access control list of the relevant database is considered.

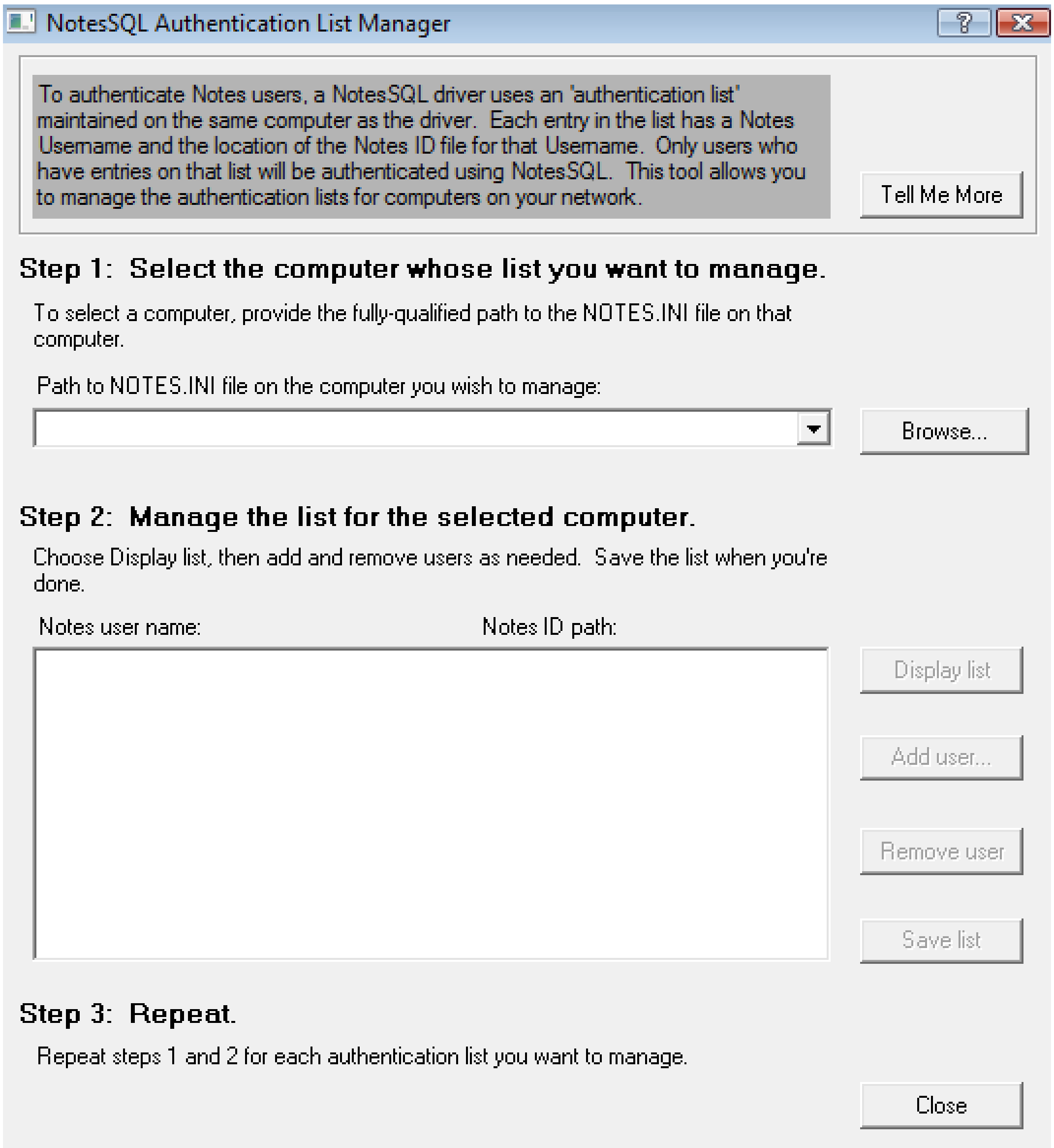


Fig. 53: NotesSQL Authentication List Manager

Finally, depending on the operating system used (Windows XP, Windows Vista …) a connection (Notes ODBC Connect) to the desired Notes database is to be established via the ODBC data source administrator and/or the application used. For detailed instructions refer to the help of the respective application.

10.4.3 Configuration for Crystal Reports

Some predefined reports in Crystal Reports format are included in delivery. To run these reports, use e.g. Saberlogic Logicity products (http://www.logicitysuite.com).

Configuration:

1. You require NotesSQL (installation see chapt. 10.4.2) and ODBC data sources for the Notes databases with the following names:

hm_servicedesk
hm_admin
hm_change
hm_survey
and, in addition, if HelpMatics™ CMS is used: hm_cmsep for access to the SQL-based CMS database.

2. Start the Logicity for Crystal Reports download via the following link: http://www.logicitysuite.com/support/downloads.html
3. Install Logicity for Crystal Reports.
4. After the installation, start Logicity Desktop. Select the path to the storage location of the desired report and open the report. Enter parameters for the report.
   Use the Logicity Solution Builder to save reports according to schedule, print them or send them by e-mail.

Report parameters:

- Evaluation month in yyyy-mm format, empty parameter corresponds to the previous month

- Client: Naming of client as configured in HelpMatics™ Administration; when the parameter is empty, all clients will be included in the report.

- Responsible person's department: when the department is specified, only tickets will be considered where the specified department corresponds to the department of the currently responsible person.

- Show availability report: Determine if the availability resulting from the ACD data is to be specified in the report.

- Path to the logo: The HelpMatics™ logo is used by default. Enter the path to a different loge/graphics here. .jpg format is required, a width/height of 450 px or 12 cm must not be exceeded.

Please note:
Use a blank to specify empty parameters in the LOGICITY configuration.

11 Background processes supporting the configuration

11.1 Automatic configuration check

An automatism running periodically (by default 1 * at night) checks the configurations referred to hereinafter, transfers changes in some cases directly or identifies templates invalid due to configuration changes.

11.1.1 Changes to process teams

If team members or e-mail addresses change in a process team available for the SERVICEDESK module, this change will be transferred to tickets that have not been closed by the periodically running background process.

If team members or e-mail addresses change in a process team available for the CHANGE module, the user can decide if the changes are to be immediately transferred to RFCs, changes, releases, tasks and templates or if this update is to be made by the background process.

Team members or e-mail addresses are updated in:

- Task templates,
- Tasks in RFC or change templates (current process team),
- Tasks in RFCs, changes, releases when the task has not been completed ,
- RFCs, changes, releases: Contacts (change manager, sponsor, executor, requester) – if a process team is concerned – when process editing has not been completed.

11.1.2 Templates

Ticket templates are checked for:

- Valid categories when HelpMatics™ CMS Enterprise is used in connection with the related service,
- Valid types and root causes,
- Module availability of the process editor and/or process team,
- If a portal ticket template is concerned, module availability of the responsible person will be checked.

Change/RFC/release templates are checked for:

- Valid categories if HelpMatics™ CMS Enterprise is used in connection with the service assigned,
- Valid type,
- Availability of the process teams involved under contacts in the RESPONSIBILTY tab.

Invalid templates are identified by color and are no longer available for ticket creation. In addition, you can find those under ADMINISTRATION – MAINTENANCE – INVALID TEMPLATES. To identify which data are incorrect refer to the INVALID DATA tab in the template document. When HelpMatics™ is started, HelpMatics™ Administrators will receive a warning that templates with invalid data exist.

11.2 Automatic synchronization of process editors/teams with Domino Directory or Active Directory

Process editors and process teams can be synchronized with the Domino Directory or the Active Directory automatically. For this purpose, two agents have been designed for the HelpMatics™ Admin database which have to be customized to the respective environment.

For this, the agent in the MyConstants.java space has to be edited.

Here, the **default values**

- client
- module release
- Mail info yes/no, Mail templates and Link type in mails
- calendar system and mail system

are determined.

Furthermore, specific data for the import from Domino or Active Directory are stored.

Synchronization with Active Directory

- a group in the Active Directory must contain a specific OU, e.g. OU=HelpMatics
- OU filtering can be made via the GROUP_DN_FILTER constant in the synchronization agent.
- So, the group and all members of this group will be created as process editors

Synchronization with Domino Directory

- A group in the Domino Directory must be assigned to a specific category, e.g. HelpMatics
- The name of this category will be stored in the configuration in the synchronization agent (GROUP_CATEGORY)
- So, the group and all members of this group will be created as process editors

Generally applicable:

- When a team exists already, new team members will be created as process editors with identical settings (client, module, mail info, etc.).
- Manual changes to default values of process editors/teams made subsequently will not be overwritten

Process editors that have been created automatically and are not a member of any HM team any longer will be removed automatically.

12 Field descriptions

12.1 Incident & Problem

If you are using HelpMatics™ CMS, additional fields identified by (CMS) in the list are available.

Field name	Field type	Description
General		
ReferenceNumber	Text	Client abbreviation + unique number + process editor abbreviation
MainCategory	Text	Main category
SubCategory1	Text	Subcategory 1
SubCategory2	Text	Subcategory 2
ToDo	Text	Type
RootCause	Text	Root cause
ProblemShort	Text	Brief description
Problem	Text	Request
Solution	Text	Solution
Process	Text	Processing
Screenshot	Rich text	Field for screenshots
Enclosure	Rich text	Field for attachments
CreateDate	Date/Time	Create time and date
DateClosed	Date/Time	"Status closed" date
DateD	Date - Date	Date - date only
DateT	Date - Time	Date - time only (without time zone)
DateWZone	Date/Time	Date - date and time (incl. time zone)
ProcessTime	Number	Process time in minutes (calculation only after completion)
Counter	Number	Forward count
Service (CMS)	Text	Service CI
FirstLAName	Text	Name of service level template
User		
FirstName	Text	First name
LastName	Text	Last name
UserID	Text	User ID
User_CIID (CMS)	Text	unique user ID in HelpMatics™ CMS
Position	Text	User's position in the company
OfficePhoneNumber	Text	Phone number (office)
MobilNumber	Text	User's mobile phone number
MailAddress	Text	User's mail address
FaxNumber	Text	Fax number
EmployeeID	Text	User's employee ID
CostCentre	Text	Cost center assigned to the user
RoomNr	Text	Room where you'll find the user
Location	Text	Location
Building	Text	Building
Department	Text	Department where the user works

BusinessUnit	Text	Name of the organization
CompanyName	Text	User's client
CompanyShort	Text	Client abbreviation
VIP	Text	Specified priority
Caller		
Caller_FirstName	Text	Caller's first name
Caller_LastName	Text	Caller's last name
Caller_UserID	Text	Caller's user ID
Caller_CIIDUS (CMS)	Text	unique user ID in HelpMatics™ CMS
Caller_Position	Text	Caller's position in the company
Caller_OfficePhoneNumber	Text	Caller's (office) phone number
Caller_MailAddress	Text	Caller's mail address
Caller_Department	Text	Department where the caller works
User's configuration items		
User_EquipNumber	Text	Config. item number
User_CIIDHW (CMS)		unique config. item ID in HelpMatics™ CMS
User_EquipCategory	Text	Config. item category
User_EquipManu	Text	Config. item manufacturer
User_EquipModel	Text	Config. item model
User_EquipType	Text	Config. item type
User_EquipIPAddress	Text	Config. item IP address
User_EquipOSVersion	Text	Config. item software version
CI (root cause) - Hardware		
EquipNumber	Text	CI (root cause) number
CIIDHW (CMS)	Text	unique CI ID in HelpMatics™ CMS
EquipCategory	Text	CI (root cause) category
EquipManu	Text	CI (root cause) manufacturer
EquipModel	Text	CI (root cause) model
EquipType	Text	CI (root cause) type
EquipDescription	Text	CI (root cause) description
EquipIPAddress	Text	CI (root cause) IP address
EquipOSVersion	Text	CI (root cause) software version
EquipLocation	Text	CI (root cause) location
EquipBuilding	Text	CI (root cause) building
EquipRoomNr	Text	CI (root cause) room
CI (root cause) - software (CMS)		
SW_Label	Text	CI (root cause) name

CIIDSW	Text	unique CI ID in HelpMatics™ CMS
SW_Category	Text	CI (root cause) category
SW_Manufacturer	Text	CI (root cause) manufacturer
SW_Model	Text	CI (root cause) license name
SW_BuildType	Text	CI (root cause) type
SW_Version	Text	CI (root cause) version
SW_Language	Text	CI (root cause) language
SW_LicenceNo	Text	CI (root cause) license number
CI (root cause) - service (CMS)		
SC_Label	Text	CI (root cause) name
CIIDSC	Text	unique CI ID in HelpMatics™ CMS
SC_Category	Text	CI (root cause) category
SC_Responsible	Text	Person/team responsible for the CI (root cause)
SC_Impact	Text	CI (root cause) impact factor
SC_BuildType	Text	CI (root cause) type
SC_ValidFromDate	Text	CI (root cause) valid from
SC_ValidTillDate	Text	CI (root cause) valid until
SC_LAName	Text	CI (root cause) name of service level template
Editing status		
Status	Text	Status ("open", "work in progress", "assigned external", "on hold", "closed")
StatNr	Number	Status number (1, 2, 3, 4, 5)
StatusHistory	Text list	History of status changes of an Incident ticket
StatusHistoryD	Date/time list	History of times of status changes
StatusHistoryU	Test list	History of persons that changed the status
Priority	Text	Priority
PrioNr	Number	Priority number from 1 (lowest) to 5 (highest priority)
PriorityHistory	Test list	History of priority changes of an Incident ticket
PriorityHistoryD	Date/time list	History of times of priority changes
PriorityHistoryU	Text list	History of persons that changed the priority
FeedbackWay	Text	Type of date, e.g. reminder
DeadLine	Date/Time	Calculated process deadline (client monitoring)
DEADLINE2ND	Date/Time	Calculated process deadline for the current group (process editor monitoring)
Responsibility		
RespFullName	Text	Person/team responsible until the task is closing
RespPhoneNumber	Text	Creator's phone No.
RespCompanyName	Text	Creator's client
RespDepartment	Text	Department
RespComShort	Text	Creator's client abbreviation
RespMail	Text	Creator's e-mail address

Rname	Text	Responsible person's first and last name (common name)
Process editor		
ProFullName	Text list	Processor list; the last process editor in this list is process owner
ProPhoneNumber	Text list	Process editor phone No. list
ProDate	Date/time list	Date of assignment list
ProCompanyName	Text list	Process editors' client list
ProComShort	Text	Client abbreviation of the current process editor
ProDepartment	Text list	Process editors' department list
ProMail	Text list	E-mail address of the current process editor
ProNameTime	Text list	History of manually entered process times incl. names
ProTime	Number list	History of manually entered process times
GroupMembers	Test list	Team members if ticket is forwarded to a process team
Uname	Text	First and last name of the current process editor (common name); is empty if a process team is concerned
ptDate, ptTime, ptUser	Text list	List of associated data: Date stamp of time recording, time recorded per day, user name
Process teams		
ProGrpName	Text list	List of process teams involved
ProGrpStart	Date/time list	Date of assignment to process team
ProGrpEnd	Date/time list	Date of process end of a team
ProGrpEscLevel	Text list	Escalation level reached (process editor monitoring)
System fields		
HMID	Text	internal HelpMatics™ ID (for Enterprise setup)
IcoBackInfo	Number	Icon value
IcoFeedBackWay	Number	Icon value
IcoPrioNr	Number	Icon value
IcoStatNr	Number	Icon value
KnowledgeBase	Text	Transfer to knowledge database
Server	Test list	Information on server and database
SortStatNr_RefNr	Text	Sort field
ALERTDATE1ST	Date/time list	Monitoring levels (client monitoring)
ALERTTEXT1ST	Test list	Monitoring descriptions (client monitoring)
ALERTDATE2ND	Date/time list	Monitoring levels (process editor monitoring)
ALERTTEXT2ND	Test list	Monitoring descriptions (process editor monitoring)
Reader1	Reader	Read access to ticket
Reader2	Reader	Read access to ticket
Reader3	Reader	Read access to ticket
Author	Text	Access rights to Author access level
LASTEDITEDAT	Date/Time	Ticket was last changed on/at
LASTEDITEDBY	Text	Ticket was last changed by

CallOpen	Text	Reopen performed? Y/N
bulkTicket	Text	Master tickets/sub-ticket ID (1=master ticket, 2=sub-ticket)
FeedBackPro	Text	Status of return
Form	Text	Screen name

12.2 User (CMDB)

When using HelpMatics™ CMS, refer to the HelpMatics CMS Enterprise documentation, chap. 3.4.2 column definitions, for field names.

Field name	Field type	Description
Building	Text	Building
BusinessUnit	Text	Business unit
CompanyName	Text	User's client
CompanyShort	Text	User's client abbreviation
CostCentre	Text	Cost center the user is assigned to
Department	Text	Department where the user works
EmployeeID	Text	User's employee ID
FaxNumber	Text	User's fax No.
FirstName	Text	First name
FlexField1	Text	Flexibly usable field
Floor	Text	Floor
LastName	Text	Last name
Location	Text	Location
MailAddress	Text	User's mail address
MobilNumber	Text	User's mobile phone number
OfficePhoneNumber	Text	Phone number (office)
Position	Text	User's position in the company
PrioNr	Number	Priority No. in case of specified priority
Priority	Text	Priority description in case of specified priority
RoomNr	Text	Room where you'll find the user
Title	Text	Title
UserID	Text	User ID
VIP	Text	Specified priority ("1" = activated)
System fields		
Reader1, reader2	Reader	Read access to document
Author	Text	Access rights to Author access level

12.3 Configuration items (CMBD)

When using HelpMatics™ CMS, refer to the HelpMatics CMS Enterprise documentation, chap. 3.4.2 column definitions, for field names.

Field name	Field type	Description
EquipAccout	Number	Value
EquipContractPeriod	Text	Contract period
EquipDeliveryDate	Date/Time	Delivery date
EquipFlex_1	Text	Flexible field 1
EquipFlex_2	Text	Flexible field 2
EquipFlex_3	Text	Flexible field 3
EquipLeasRate	Number	Leasing rate
EquipSerial	Text	Serial number
Building	Text	Building
BusinessUnit	Text	Business unit
CompanyName	Text	CI's client
CompanyShort	Text	User's client abbreviation
CostCentre	Text	Cost center the hardware is assigned to
Department	Text	Department the hardware is assigned to
EquipCategory	Text	Config. item category
EquipContractNr	Text	CI contract number
EquipDescription	Text	CI description
EquipHWAddress	Text	CI hardware address
EquipIPAddress	Text	Config. item IP address
EquipLeasDate_1	Text	CI leasing/purchase start
EquipLeasDate_2	Text	CI leasing/purchase end
EquipLocation_1	Text	CI location 1
EquipLocation_2	Text	CI location 2
EquipManu	Text	Config. item manufacturer
EquipModel	Text	Config. item model
EquipNumber	Text	Config. item number
EquipOrderNr	Text	CI order number
EquipOSVersion	Text	Config. item software version
EquipType	Text	Config. item type
Floor	Text	Floor
Location	Text	Location
RoomNr	Text	Room
additional fields for sub CIs		
ParentEquip	Text	CI number of the parent CI
User fields, see user table		
System fields		
Reader1, reader2	Reader	Read access to document
Author	Text	Access rights to Author access level

12.4 Web request

Field name	Field type	Description
Requester		
Lastname	Text	Requester's last name
Firstname	Text	Requester's first name
Email	Text list	Requester's e-mail address
Phone	Text	Requester's phone
Department	Text	Requester's department
Location	Text	Requester's location
Costcentre	Text	Requester's cost center
Facsimile	Text	Requester's fax
Reporter		
Lastname2	Text	Reporter’s last name
Firstname2	Text	Reporter’s first name
Email2	Text list	Reporter’s e-mail address
Phone2	Text	Reporter’s phone
Department2	Text	Reporter’s department
Location2	Text	Reporter’s location
Costcentre2	Text	Reporter’s cost center
Facsimile2	Text	Reporter’s fax
Supervisor		
svLastname	Text	Supervisor’s last name
svFirstname	Text	Supervisor’s first name
svMailaddress	Text	Supervisor’s e-mail address
svPhone	Text	Supervisor’s phone
Change Manager		
CmFullname	Text	Change manager’s name
CmPhone	Text	Change manager’s phone
CmMailaddress	Text list	Change manager's e-mail address
CmDepartment	Text	Change manager’s department
CmLocation	Text	Change manager’s location
CmCostcentre	Text	Change manager’s cost center
CmCompanyName	Text	Change manager’s client
CmCompanyShort	Text	Change manager’s client abbreviation
General		
Description	Text	Description
Reason	Text	Reason
Target	Text	Target
Suggestion	Text	Suggestion
Improvement	Text	Improvement
Cimpl	Date/Time	Implementation date

Expense		
CATime	Text	Current expense in hours
CFTime	Text	Future expense in hours
CAMoney	Text	Current expense in €
CFMoney	Text	Future expense in €
System fields		
Form	Text	Screen name
Name	Text	Name of RFC template
label…	Text	Field labeling of the filled in Web request template (Notes client)
value…	Text	Field labeling of the Web request template (web client)
MailTemplateDemandCancelReq	Text	Mail template name in case of rejection
MailTemplateDemandInfoCm	Text	Mail template name in case of info to Change Manager
MailTemplateDemandInfoReq	Text	Mail template name in case of info to requester
Reader	Reader	Read access to document

12.5 RFC & Change

Field name	Field type	Description
General		
ReferenceNumber	Text	RFC/Change ID
BriefDescription	Text	Brief description
Description	Text	Description
CompanyName	Text	Client
CompanyShort	Text	Client abbreviation
ImplementationDateEnd	Date/Time	RFC processing start/Change implementation start
ImplementationDateStart	Date/Time	RFC processing end/Change implementation end
ChangeRealisationDate	Date/Time	RFC implementation date (RFC only)
CreateDate	Date/Time	Web request date
Mode	Text	Type of RFC/Change (standard,normal, emergency)
targetCalculation	Text	autom. time calculation: fixed end date = "1", fixed task period = "2"
doRecalc	Text	automatic calculation ("1" = activated)
Description	Text	Description
Reason	Text	Reasons for implementation/non-implementation
Classification		
MainCategory	Text	Main category
SubCategory1	Text	Subcategory 1
SubCategory1	Text	Subcategory 2
ToDo	Text	Type
Priority	Text	Priority

Urgency	Text	Urgency
BusinessRelevance	Text	Business relevance
Impact	Text	Impact
RiskLevel	Text	Risk
Requester		
RequesterFullname	Text	Requester's name (last name, first name)
RequesterPhone	Text	Requester's phone
RequesterMailaddress	Text list	Requester's e-mail address
RequesterchkInfoMail	Text	E-mail notification ("1" = activated)
RequesterDepartment	Text	Requester's department
RequesterLocation	Text	Requester's location
RequesterCostcentre	Text	Requester's cost center
RequesterComment	Text	Comment
RequesterCompanyShort	Text	Requester's client abbreviation
RequesterGroupMembers	Text list	Team members
Caller		
CallerFullname	Text	Caller’s name (last name, first name)
CallerPhone	Text	Caller’s phone
CallerMailaddress	Text-Liste	Caller’s e-mail address
CallerchkInfoMail	Text	E-mail notification ("1" = activated)
CallerDepartment	Text	Caller’s department
CallerLocation	Text	Caller’s location
CallerCostcentre	Text	Caller’s cost center
CallerCompanyShort	Text	Caller’s client abbreviation
Supervisor		
SupervisorLastname	Text	Supervisor’s last name
SupervisorFirstname	Text	Supervisor’s first name
SupervisorMailaddress	Text	Supervisor’s e-Mail address
SupervisorPhone	Text	Supervisor’s phone
Sponsor		
SponsorFullname	Text	Sponsor's name (last name, first name)
sponsorPhone	Text	Sponsor's phone
sponsorMailaddress	Text list	Sponsor's e-mail address
SponsorchkInfoMail	Text	E-mail notification ("1" = activated)
sponsorDepartment	Text	Sponsor's department
sponsorLocation	Text	Sponsor's location
sponsorCostcentre	Text	Sponsor's cost center
SponsorCompanyShort	Text	Sponsor's client abbreviation
SponsorGroupMembers	Text list	Team members
Executor		
ExecutorFullname	Text	Executor's name (last name, first name)

ExecutorPhone	Text	Executor's phone
ExecutorMailaddress	Text list	Executor's e-mail address
ExecutorchkInfoMail	Text	E-mail notification ("1" = activated)
ExecutorDepartment	Text	Executor's department
ExecutorLocation	Text	Executor's location
ExecutorCostcentre	Text	Executor's cost center
ExecutorCompanyShort	Text	Executor's client abbreviation
ExecutorGroupMembers	Text list	Team members
Change Manager		
CmFullname	Text	Change manager's name (last name, first name)
CmPhone	Text	Change manager’s phone
CmMailaddress	Text list	Change manager's e-mail address
CmchkInfoMail	Text	E-mail notification ("1" = activated)
CmDepartment	Text	Change manager’s department
CmLocation	Text	Change manager’s location
CmCostcentre	Text	Change manager’s cost center
CmCompanyShort	Text	Change manager’s client abbreviation
CmGroupMembers	Text list	Team members
Status		
Status	Text	Status (see HelpMatics Change documentation)
StatNr	Number	Status number
STATSINCE	Date/Time	when was the status set
StatEditor	Text	by whom was the status set
Status-Reporting		
dateStatNew	Date/Time	Time of status "New" set
dateStatProcessingActive	Date/Time	Time of status "Processing active" set
dateStatOnHold	Date/Time	Time of status "On hold" set
dateStatAuthorized	Date/Time	Time of status "Authorized" set
dateStatClosed	Date/Time	Time of status "Closed" set
dateStatProcessingCompleted	Date/Time	Time of status "Processing completed" set
dateStatProcessingReviewed	Date/Time	Time of status "Reviewed" set
dateStatProcessingRejected	Date/Time	Time of status "Rejected" set
Documentation		
link	Rich text	Field for links
Enclosure	Rich text	Field for attachments
Budget		
Effort_1	Number	Implementation effort (RFC only)
Duration	Number	Implementation period (RFC only)
TimeUnit	Text	Unit for implementation period (RFC only)
EffortETarget	Number	TARGET external expense
EffortMTarget	Number	TARGET material expense

CostsTarget	Number	TARGET costs total
EffortTActual	Number	ACTUAL expense in hours (Change only)
EffortMActual	Number	ACTUAL material expense (Change only)
EffortEActual	Number	ACTUAL external expense (Change only)
CostsActual	Number	ACTUAL costs total (Change only)
EffortTDiff	Number	Difference between total target and actual expense in h (Change only)
EffortMDiff	Number	Difference between target and actual material expense (Change only)
EffortEDiff	Number	Difference between target and actual external expense (Change only)
CostsDiff	Number	Difference between target and actual costs
Additional information provided by the requester for optional tasks		
OptTaskID_<i>	Text	ID of the optional task selected in the web request
OptTaskLabel_<i>	Text	Opt. task labeling in the web request
OptTaskValue_<i>	Text	Additional input field content in opt. task
OptTaskAction_<i>	Text	Selected auxiliary value in opt. task
System fields		
targetCalculation	Text	automatic time calculation ("1" = activated)
HMID	Text	internal HelpMatics™ ID (for Enterprise setup)
IcoPrioNr	Number	Icon value
IcoStatNr	Number	Icon value
Server	Text list	Information on server and database
Reader	Reader	Read access to document
LeserGeneral	Reader	Read access to document
Form	Text	Screen name
Creator	Text	Author of the document
ReplMark	Text	Availability (for Enterprise setup)
Autoclose	Text	ID of standard Changes that are closed automatically
CarrierID	Text	Ticket ID of the carrier ticket

12.6 Release

Field name	Field type	Description
General		
ReferenceNumber	Text	Release ID
BriefDescription	Text	Brief description
Description	Text	Description
CompanyName	Text	Client
CompanyShort	Text	Client abbreviation
ImplementationDateEnd	Date/Time	Start date
ImplementationDateStart	Date/Time	End date
ChangeRealisationDate	Date/Time	Implementation date

CreateDate	Date/Time	Web request date
targetCalculation	Text	autom. time calculation: fixed end date = "1", fixed task period = "2"
doRecalc	Text	automatic calculation ("1" = activated)
Classification		
MainCategory	Text	Main category
SubCategory1	Text	Subcategory 1
SubCategory1	Text	Subcategory 2
Requester		
RInitiatorFullname	Text	Requester's name
RInitiatorPhone	Text	Requester's phone
RInitiatorMailaddress	Text list	Requester's e-mail address
RInitiatorDepartment	Text	Requester's department
RInitiatorLocation	Text	Requester's location
RInitiatorCostcentre	Text	Requester's cost center
RInitiatorCompanyShort	Text	Requester's client abbreviation
RInitiatorGroupMembers	Text list	Team members
Executor		
RExecutorFullname	Text	Executor's name
RExecutorPhone	Text	Executor's phone
RExecutorMailaddress	Text list	Executor's e-mail address
RExecutorDepartment	Text	Executor's department
RExecutorLocation	Text	Executor's location
RExecutorCostcentre	Text	Executor's cost center
RExecutorCompanyShort	Text	Executor's client abbreviation
RExecutorGroupMembers	Text list	Team members
Release Manager		
RManagerFullname	Text	Release manager’s name
RManagerPhone	Text	Release manager’s phone
RManagerMailaddress	Text list	Release manager's e-mail address
RManagerDepartment	Text	Release manager’s department
RManagerLocation	Text	Release manager’s location
RManagerCostcentre	Text	Release manager’s cost center
RManagerCompanyShort	Text	Release manager’s client abbreviation
RManagerGroupMembers	Text list	Team members
Status		
Status	Text	Status (see HelpMatics Change documentation)
StatNr	Number	Status number
STATSINCE	Date/Time	when was the status set
StatEditor	Text	by whom was the status set

Status-Reporting		
dateStatNew	Date/Time	Time of status "New" set
dateStatProcessingActive	Date/Time	Time of status "Processing active" set for the first time
dateStatOnHold	Date/Time	Time of status "On hold" set
dateStatClosed	Date/Time	Time of status "Closed" set
dateStatProcessingCompleted	Date/Time	Time of status "Processing completed" set
System fields		
HMID	Text	internal HelpMatics™ ID (for Enterprise setup)
IcoPrioNr	Number	Icon value
IcoStatNr	Number	Icon value
Server	Text list	Information on server and database
Reader	Reader	Read access to ticket
LeserGeneral	Reader	Read access to ticket
Form	Text	Screen name
Creator	Text	Author of the document
ReplMark	Text	Availability (for Enterprise setup)

12.7 Task

Field name	Field type	Description
General		
ReferenceNumber	Text	RFC/Change ID of the superior document
BriefDescription	Text	Brief description
Description	Text	Description
TaskType	Text	Type
Evaluation	Text	Evaluation
Status	Text	Status
Comment	Comment	Editing comment
Duration	Number	Min. task period
TimeUnit	Text	Unit for min. task period
Begin_1	Date/Time	Start - Target
Begin_2	Date/Time	Start - Actual
Finished_1	Date/Time	End - Target
Finished_2	Date/Time	End - Actual
Effort_1	Number	Expense: Target in hours
Effort_2	Number	Expense: Actual in hours
Enclosure	Rich text	Field for attachments
Process editor		
ProFullName	Text list	List of process editors (last name, first name)
ProDate	Date list	Date of assignment list
ProDepartment	Text list	Department list of process editors
ProMailAddress	Text list	Mail address(es) of the current process editor/team
ProMailLink	Text list	Links to be sent
ProMailTemplate	Text	Mail template name
ProPhoneNumber	Text list	Process editors' phone number list
ProCompanyName	Text list	Process editors' client list
ProCompanyShort	Text	Client abbreviation of the current process editor/team
GROUPMEMBERS	Text list	List of team members for team assignment
IndividualGroupMembers	Text list	Individually compiled list of process editors
Time recording		
eDate	Date list	Time recording of dates
Editor	Text list	Process editors' time recording
eMin	Number list	Time recording in minutes
eHour	Number list	Time recording in hours
eTotalHour	Number	Time recording in hours (total)
eTotalDay	Number	Time recording in workdays (total)
History		
HistoryAction	Text list	History of changes recorded
HistoryDate	Date list	History of times of changes recorded
HistoryUser	Text list	History of persons that effected the change

System fields		
HMID	Text	internal HelpMatics™ ID (for Enterprise setup)
CHBRIEFDESCRIPTION	Text	Brief description of the parent Release/RFC/Change
IcoStatus	Number	Icon value
Server	Text list	Information on server and database
Reader	Reader	Read access to document
LeserGeneral	Reader	Read access to document
Form	Text	Screen name
Active	Text	identifies active tasks ("1")
PARALLEL	Text	Downgrade in case of parallel tasks
Position	Number	Position in workflow
ReplMark	Text	Availability (for Enterprise setup)

13 Appendix

13.1 Overview of the changed role descriptions

Role description up to V5.5	Role description from V6.0
[_Administration] [Admin]	[&R_Manager]
[Statistics] [_Reporting]	[&F_Reporting]
[1st-Level]	[&R_1stLevel]
[2nd-Level]	[&R_2ndLevel]
[2nd-LevelCreate]	[&R_2ndLevelNew]
[_ProblemOwner], [_ProblemEditor]	[&R_ProblemOwner], [&R_ProblemEdit]
[_ProblemManager]	[&R_ProblemOwner]
[Reopen]	[&F_Reopen]
[DelResources]	[&F_DelResources]
[DelTickets]	[&F_DelTickets]
[QuickDelete]	[&F_QuickDelete]
[ReadAll]	[&F_ReadAll]
[global]	[&F_Global]
[GlobalAdmin]	[&F_GlobalAdmin]
[Creator]	[&R_Creator]
[_Expert]	[&R_Expert]
[_Manager]	[&R_KBManager]
[_ChangeManager]	[&R_ChangeMngr]
[_DemandCreator]	[&R_DEMANDCREATE]
[_TaskEditor]	[&R_TaskEditor]
[Poll]	[&R_Poll]
[_handleDemand]	[&R_DEMANDCREATE]
[_ProfileAdmin]	[&F_PROFILE]

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COC AG
Product Management HelpMatics™

Gewerbepark Lindach A 12
84489 Burghausen
Germany

Telephone: +49 (0)8677 / 9747 - 0
fax: +49 (0)8677 / 9747 - 199

E-Mail info@coc-ag.de
Internet: www.helpmatics.com