



HelpMatics™

Service Management System



HelpMatics™ CMS Enterprise

Manual

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1 Overview

1.1 Introduction

HelpMatics™ CMS Enterprise is a Configuration Management System of the HelpMatics™ Suite that uses a relational database management system (RDBMS)+ for data storage. The user interface is an HCL Notes composite application.

1.2 System requirements

The following requirements apply to HelpMatics™ CMS Enterprise:

- HCL Domino Server 8.5.3 Upgrade Pack 1 and higher
- HCL Notes Client 8.5.2 Standard and higher
- Oracle 11g or MSSQL server (use with other RDBMS possible upon request)

1.3 Configuration

You configure the link to RDBMS in the DB Configuration tab under Administration – Modules. Please note that the structure of the JDBC URL is based on the database system used.

Examples:

- JDBC URL for MS SQL Server: jdbc:sqlserver://sqlserver1:1433;databaseName=cms1 (JDBC driver: com.microsoft.sqlserver.jdbc.SQLServerDriver)
- JDBC URL for Oracle Server: jdbc:oracle:thin:@orclserver1:1521:ORCL1 (JDBC driver: oracle.jdbc.driver.OracleDriver)

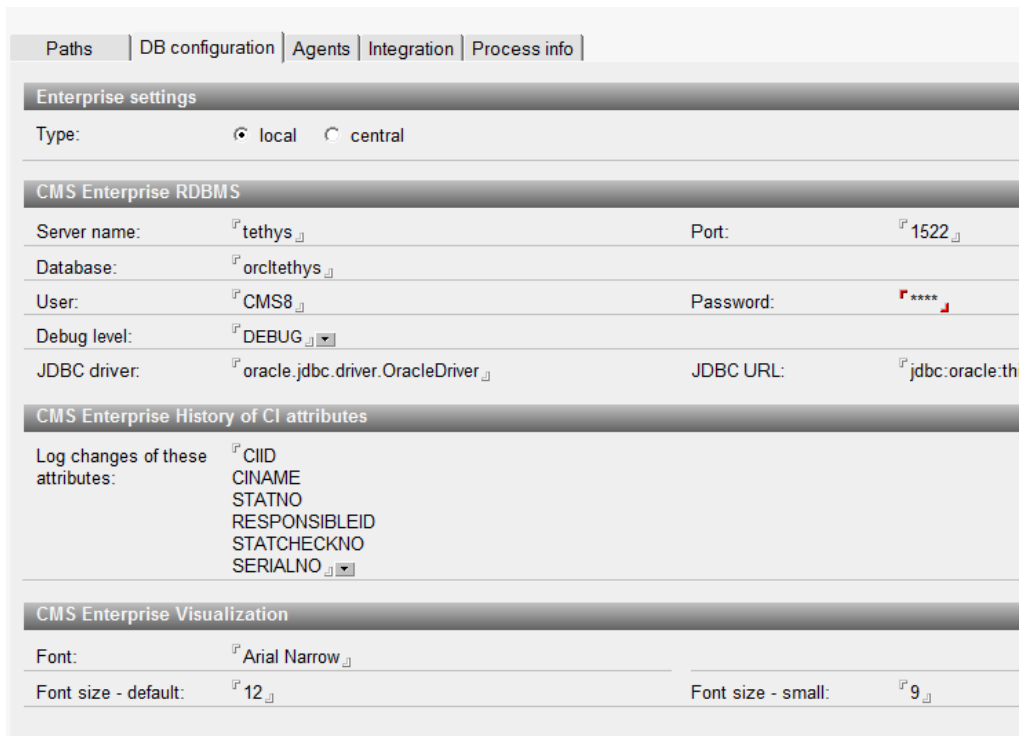


Fig. 1: Configuration under Administration - Modules

Here you also configure the attribute changes to be logged in the history. Furthermore, visualization details are defined there.

2 Show and filter CIs

2.1 Interface

The CIs are provided in various views which you open via the navigation.

The composite application architecture allows the display of additional information on the currently selected CI. When a CI is selected in the view section, the corresponding CI details, incidents/problems, RFCs/changes, relations as well as the change history will be displayed in additional windows.

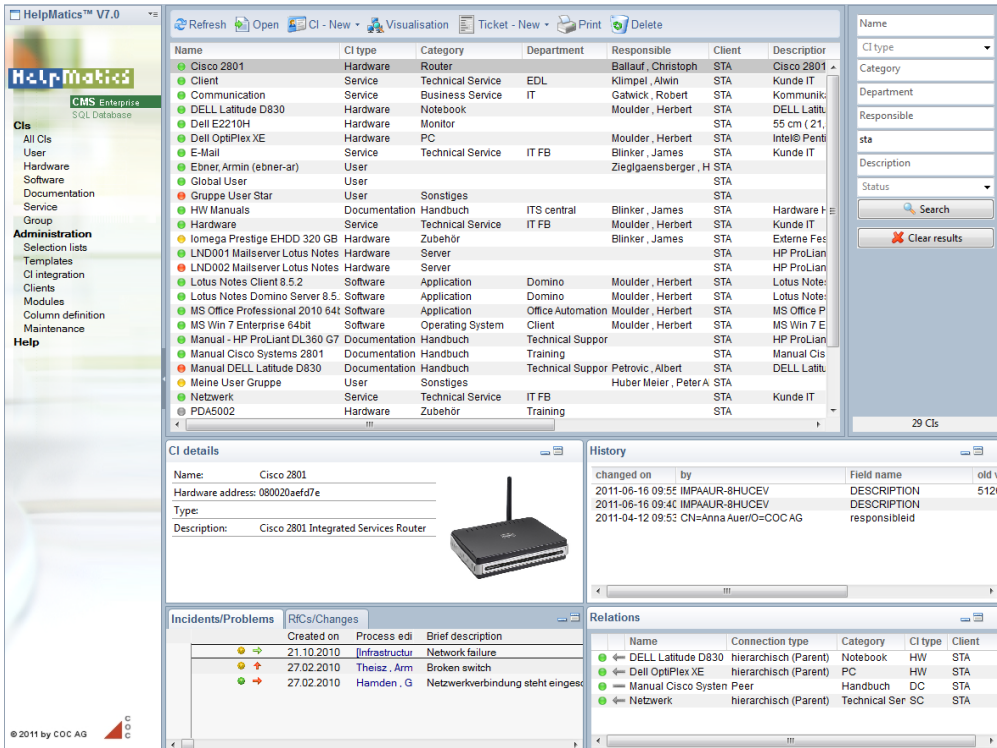


Fig. 2: CI: 'Cisco 2801', selected in the All CIs view, filtered by 'STA' client.

You open the selected CI in a new tab by double clicking the CI or clicking Open:

Show and filter CIs

The screenshot shows a web browser window with the following content:

- Browser tabs: Home, HM CMS V9.0, HM CMS EP V9d CI details
- Page title: 7-Zip 9 (x64 edition)
- Navigation: Close, Edit, Visualisation, Tools, Ticket - New, Existing Tickets
- Section: Software: 7-Zip 9 (x64 edition)
- Sub-sections: Software, Contract / costs, Attachments, Relations, History
- Description:**
 - CI-ID: VSNS-9CLL5E
 - Name: 7-Zip 9 (x64 edition)
 - Type: [dropdown]
 - Category: Systemprogramme
 - Manufacturer: Igor Pavlov
 - License name: [dropdown]
 - Version: [dropdown]
 - Description: [text field]
- Configuration:**
 - Status: active
 - Responsible: [dropdown]
 - Check status: Checked Not checked
 - Impact factor: 0
 - Change obligation: Yes No
 - License No.: [text field]
 - Language: [dropdown]
 - Revision number: [text field]
- Business unit:**
 - Client: COC Germany AG
 - Business unit: [text field]
 - Department: [text field]
 - Cost centre: [text field]
- Site:**
 - Site: COC Hannover
 - Location: Hannover
 - Building: W26
 - Floor: [text field]
 - Room: [text field]

Fig. 3: Example: CI: Software

2.2 Search / Filter

A filter area is available on the right in all CI views. The attributes displayed in columns in the view are offered as filter criteria (to be configured under Administration – Column Definition).

If the cursor is in the view, you can enter the search term directly. The search term will be entered automatically into the search field that relates to the sorted column (by default the first column of the view and thus the first search field unless you actively sorted the columns).

Drop-down boxes are available in fields with default values.

You can search for empty fields or fields with content by entering <empty> or <not_empty>, respectively.

2.2.1 Text fields

You can search for text contents in fields with text content by using the following rules:

- starts with (search term ends with *, e.g. gruber*)
- contains (search term without or preceded with and followed by *, e.g. gruber or *gruber*)
- ends with (the search term is preceded with *, e.g. *gruber)

To reverse the search, prepend <> or <NOT>. Search is not case sensitive.

Example:

<>a* as search term will deliver all CIs that do not start with an a or an A.

Search options:

- An exact case-sensitive search can be conducted by prepending =
- Terms separated by @ are identified as search terms separated by OR (exact search per term)

Examples:

Search term	Possible results
meier	Obermeier, Meier, Meierhuber
„Meier“	Meier
=Meier	Meier
Meier*	Meier, Meierhuber

2.2.2 Numerical and date fields

If <= or < or >= or > is prepended, the fields will be checked for greater than (equal to) or smaller than (equal to). A date must be specified in the default format (yyyy-mm-dd).

If = is prepended, an exact search will be carried out.

If <> or <NOT> is prepended, the fields will be checked for unequal contents.

2.3 Visualization

Links between CIs can be represented graphically. Select or open a CI and choose the Visualization menu item.

Use the plus and minus buttons to define the number of levels to be displayed (number of linking levels to be displayed, starting from the selected CI).

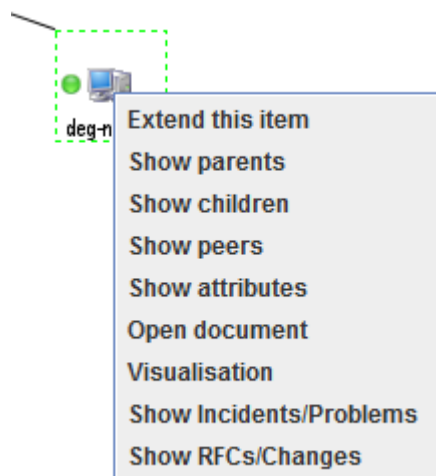
Each CI type is represented by a defined icon. "Stacked" icons are used for groups.

Show and filter CIs

On the right, you can filter by status, CI type and category and restrict the search to hierarchical display below classified CIs.

Depending on the situation, the following functions are available in the context menu of a CI icon:

- Show all relations
- Show parent items
- Show child items
- Show peer items
- Show team members
- Hide relations
- Show attributes (attributes of the CI will be shown). Also as a tooltip - text.
- Open document
- Visualization in a separate window
- Show Incidents/Problems
- Show RFCs/Changes



2.4 Export

2.4.1 Function

Export is executed separately according to CI type.

In the following views, the export function is available beneath the filter function:

- CIs->User
- CIs->Hardware
- CIs->Software
- CIs->Service
- CIs->Documentation
- CIs->Location

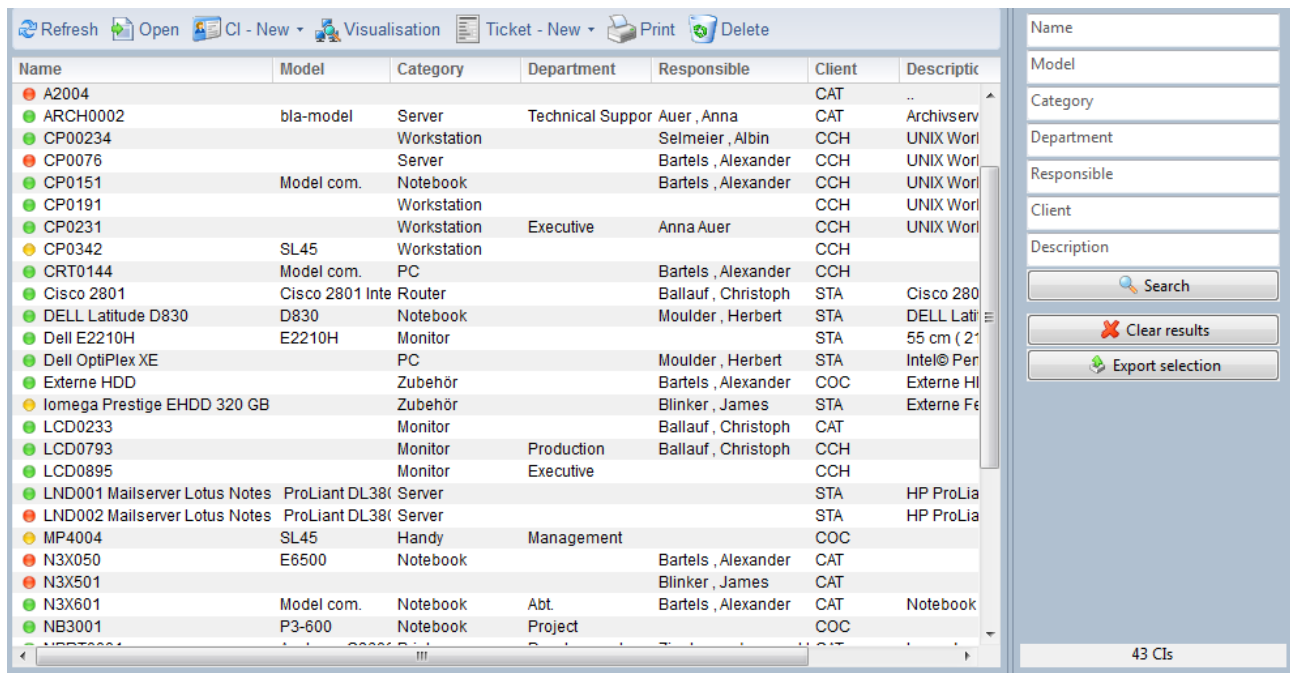


Fig. 5: CI->User view; filter and export function

If you don't apply a filter, all CIs of a view will be exported to a text file. If you use a filter, only the filtered CIs will be exported.

All fields of a CI will be exported. For field names, description and data types, refer to the data definition in chapter 0.

In the CI -> User view, the Export (E-Mail) action is additionally available. This action provides an instantly available e-mail list for surveys in HelpMatics™ Survey.

2.4.2 Column definition

2.4.2.1 Fields common to all CIs

Name	Field name	Data type	Description
	version	Integer	Internal field for controlling blockings
ID	id	Long	CI ID for database internal use
CI ID	ciid	String	Example: CIAAUR-76REU6 (design may be adapted)
CI type	citype	String	Possible values: US, HW, SW, SC, DC meaning: user, hardware, software, service, documentation
Address	Listcisite.sitename	String	Sites can be defined as a drop down list in the administration section
Street	Listcisite.sitestreet	String	Address-related field
Location	Location or Listcisite.sitelocation	String	Address-related field; may, however, also be entered directly in the CI
ZIP code	Listcisite.sitezip	String	Address-related field
Building	Building or. Listcisite.sitebuilding	String	Address-related field; may, however, also be entered directly in the CI
CI name	ciname	String	CI name; for users it is made up of last name, first name and user ID.
Status	statno	Integer	CI status: Status numbers for users: 4 = active 6 = temporarily inactive 8 = left the company Status numbers for other CIs: 2 = in preparation 4 = active 6 = temporarily inactive 8 = deactivated
Client	companyshort	String	Client abbreviation
Owner	responsibleid	String	Field for selecting the person responsible
Department	department	String	
Check status	statcheckno	Boolean	Selection field, Checked = 1 / true Not checked = 0 / false
Organisation	businessunit	String	
Cost center	costcentre	String	
Category	category	String	
Description	description	String	

Show and filter CIs

Change obligation	optchangeobligat	Boolean	Selection field for specifying if changes to the CI are to be documented in a change document Yes = 1 / true No = 0 / false
Impact factor	impact	Short	Numerical field for values to be manually defined, e.g. 0 -> low impact 10 -> high impact
	isgroup	Boolean	1 / true = group 0 / false = no group
Floor	floor	String	
Room	roomno	String	
Deletion flag	deletionmark	Boolean	0 / false = not deleted 1 / true = deleted
FLEX	FLEX_01 - FLEX_10	String	flexibly usable text boxes
FLEXCOMBO	FLEXCOMBO_01 - FLEXCOMBO_05	String	flexibly usable drop down lists
FLEXDATE	FLEXDATE_01 - FLEXDATE_03	Date	flexibly usable date fields

2.4.2.2 CI: User

also see Fields common to all CIs

Name	Field name	Data type	Description
Last name	lastName	String	
First name	firstName	String	
Title	title	String	
Employee ID	employeeid	String	
Position	position	String	
Phone	officephonenumber	String	
Mobile	mobilenumber	String	
User ID	userid	String	
Fax	faxnumber	String	
E-mail	mailaddress	String	
Specified priority	specpriono	String	Selection list of configured priorities

2.4.2.3 CI: Hardware

also see Fields common to all CIs

Name	Field name	Data type	Description
Version	versionno	String	
Model	model	String	
Type	buildtype	String	

Show and filter CIs

Serial No	serialno	String	
Contract number	contractno	String	
Hardware address	hwaddress	String	
Network /IP address	ipaddress	String	
Delivery date	deliverydate	Date	
Procurement channels	procureleasing	Boolean	Selection field, leasing or purchase
Start of leasing/purchase	procurestartdate	Date	
End of leasing/purchase	procurestopdate	Date	
Leasing rate	procurerate	String	
Manufacturer	manufacturer	String	
Order number	orderno	String	
Value	value	String	
End of warranty	warrantystopdate	Date	
Start of warranty	warrantystartdate	Date	
End of maintenance contract	maintenancestopdate	Date	
Start of maintenance contract	maintenancestartdate	Date	
Inventory number	inventoryno	String	
Inventory date	inventorydate	Date	
Maintenance cycle	maintenancecycle	String	
	EXTERNALKEY	String	
CPU	CPU	String	
RAM	RAM	String	
OS-family	OSFAMILY	String	
Gateway	DEFAULTGATEWAY	String	
Installation data	INSTALLDATE	Date	
Installation position	INSTALLPOS	String	
Support URL	SUPPORTURL	String	

2.4.2.4 CI: Software components & packages

also see Fields common to all CIs

Name	Field name	Data type	Description
Licence number	licenceno	String	
Revision number	revisionNo	String	
Model	model	String	
Type	buildtype	String	
Language	language	String	

Show and filter CIs

Serial number	serialno	String	
Contract number	contractno	String	
Version	versionno	String	
Delivery date	DeliveryDate	Date	
Procurement channels	procureleasing	String	Selection field, leasing or purchase
Start of leasing/purchase	procurestartdate	Date	
End of leasing/purchase	procurestopdate	Date	
Leasing rate	procurerate	String	
Manufacturer	manufacturer	String	
Order number	orderno	String	
Value	value	String	
End of warranty	warrantystopdate	Date	
Start of maintenance contract	maintenancestartdate	Date	
End of maintenance contract	maintenancestopdate	Date	
Inventory number	inventoryno	String	
Inventory date	inventorydate	String	
Maintenance cycle	maintenancecycle	String	
Installation data	INSTALLDATE	Date	
Installation position	INSTALLPOS	String	

2.4.2.5 CI Documentation

also see Fields common to all CIs

Name	Field name	Data type	Description
Version	versionno	String	
Language	language	String	
Type	buildtype	String	
Valid from	validfromdate	Date	
Valid until	validtilldate	Date	

2.4.2.6 CI Service

also see Fields common to all CIs

Name	Field name	Data type	Description
Service level template	serviceleveltemplate	String	
Type	buildtype	String	
Valid from	validfromdate	Date	
Valid until	validtilldate	Date	

Show and filter CIs

Version	versionno	String	
---------	-----------	--------	--

2.4.2.7 CI Location

also see Fields common to all CIs

Name	Field name	Data type	Description
Type	buildtype	String	
Hardware address	hwaddress	String	
Network /IP address	ipaddress	String	
Installation data	installpos	String	
Installation position	installdate	Date	
Gateway	defaultgateway	String	

3 Editing CIs

3.1 Interface

After clicking on Edit you can change the CI and establish relations to other CIs.

Fig. 6: Hardware CI in edit mode

The values configured under **Error! Reference source not found.** and/or 5.2.2 are available in the drop-down boxes.

As regards the software CI type, the content of the license No. field is only visible and editable the appropriate authorization provided.

Via the Relations button you open a dialog for filtering and selecting CIs to/from which a relation is to be established/removed. Available types of relations are determined in the administration (see 5.1.3). The desired CIs can be selected in the selection window, optionally after their being filtered. Use the control and shift key to select several CIs. You set the relations by clicking on Apply or OK. Relations to other CIs are shown in the Relations tab. Group CIs have an additional tab called Members in which the group members are listed (this type of relation is also established via the Relations button).

As attachment, you can use any number of files as well as an image to be used for preview. If no image has been stored for the CI, an image from a related CI will be used for preview (the first available image in the following order):

- from a subordinate documentation CI
- from a superior documentation CI

- from a documentation CI subordinate to a group
- from a documentation CI assigned as parent to a group

The impact factor of the documentation CI should be the second decision criterion for the selection of the appropriate image.

Example: CI1 and CI2 belong to a group to which several documentation CIs with images are subordinated. From these, the documentation CI with the highest impact factor is used for image preview in CI1 and CI2. A different image shall now be shown for CI2. To do so, an appropriate documentation CI with a suitable image is directly connected to CI2.

3.2 Change history

In the History tab of each CI, changes to defined field values performed manually or by import will be logged (see settings under Administration – Modules – DB Configuration – History of CI-Attributes).

Logs on changes performed by the periodical import are included as log entries in the child documents for the respective import definition (Administration → CI-Integration → Import).

4 Reporting

Filtered views concerning CIs are available here.

Maintenance agreement	Software and hardware CIs with defined end of maintenance date
Leasing	Software and hardware CIs with defined end of leasing date and "Leasing" as procurement type

In the editor you can configure other views for modular applications via Actions – Edited Applications. The configuration of the existing views can be adapted in this way. The following parameters are available in the component properties:

com.helpmatics.cms.citype	Abbreviation for CI type; several CIs can be indicated, separated by @.
com.helpmatics.cms.fieldvalue	Here you can define further criteria. Field name and criterion are separated by ~. Several (OR) can be indicated, separated by @. Other pairs of field names/criteria can be strung together, separated by &&. A placeholder for the current day is available with #today#.

Example:

```
deliverydate~>2014-01-01&&&deliverydate~<=#today#+10&&&department~IT@<empty>&&&location~<not_empty>
```

com.helpmatics.cms.metacolumnid	Name of the view for column definition
---------------------------------	--



5 Administration

The Administration navigation item is only visible with special rights.
For further HelpMatics™ administration details, refer to the HelpMatics™ Admin documentation.

5.1 CI Integration

5.1.1 Import

5.1.1.1 General

Import definitions for various sources can be created under Administration – CI Integration – Import.

Sources:

- Notes
- CSV
- LDAP
- JDBC
- ODBC

Each configuration document applies to a certain CI type.

5.1.1.2 Update behavior

Via import tasks you define whether the import

- will update/complete existing documents only
- will create, update and delete documents (briefly referred to as CUD* import).
- will create and update documents
- will delete documents

Only activated import definitions will be periodically executed by the import agent. A start time can be defined for the import. An import selected in the view can be started manually via the start import action.

A log entry is created for each import run. These log entries should be archived after a certain time (default of 30 days). As soon as a valid server name or path is specified for the desired archive database in the server archive log and file archive log, the log entries will be archived in the specified database.

If Test Run is activated, no changes will be made to CIs. Only the log entries will show which changes would be made.

5.1.1.3 Notes import

The import can be executed from the Notes address book or from any other Notes database. In both cases fields for file name, server, view and filter fields are available. If the source is a Notes address book, Organisational unit and Organisation are available as additional filters.

Configuration	
Notes address book:	<input checked="" type="radio"/> Yes <input type="radio"/> No
File:	<input type="text" value="names.nsf"/>
Server:	<input type="text" value="CN=vsnotes1/O=COC AG"/>
Organisational unit:	<input type="text" value=""/>
Organisation:	<input type="text" value="*"/>
* e.g. Julia Hertz/Dev/COC-AG: the entry "Dev" refers to the organisational unit, the entry "COC-AG" to the organisation	
Search field (source):	<input type="text" value="-----"/> ▾
Search string in the specified field:	<input type="text" value=""/>
View (target):	<input type="text" value="(\$People)"/>

Fig. 7: Import definition for Notes import - display detail

The figure shows the configuration for import from the Notes address book. Only those data sets will be imported where organization = COC AG and Lastname field content = Madl.

By means of an asterisk (*) at the beginning and/or end of the search string you can extend the search to text contents in the search field (*Madl -> ends with Madl, *Madl* -> contains Madl, Madl* -> starts with Madl).

If the source field to be transferred is a multi-value field, the individual values will be separated in the target field by @.

5.1.1.4 CSV import

Exactly one character has to be entered as separator (; for example). A blank or tabulator is not a valid separator.

If, at the beginning, the file contains lines which are purely descriptive, you can exclude them from the import. Just enter the number of lines to be skipped.

The file to be imported may include field names in the first row. These field names can be used in field assignment in this case. Alternatively, the column indices starting with 0 will be entered in order to assign the columns to the target fields.

Make sure that the csv or text document only contains data that relates to the import (e.g. no comments).

Date fields can be defined in the following format in the source file:

yyyy-mm-dd ss:mm[DATE], e.g. 2011-05-20 00:00[DATE].

Contents to be displayed as numbers when being compared can be marked with [NO], e.g. 500[NO].

5.1.1.5 LDAP import

Configuration	
Initial Context:	com.sun.jndi.LdapCtxFactory
Server:	192.90.0.144
URL:	dc=abc-ag,dc=net
Authentication:	simple
Username:	cn=myuser, cn=Users, dc=coc-ag, dc=net
Password:	*****
Port:	3268
Named Context (OU):	ou=Business Units
LDAP Filter:	(&(objectClass=User) (!(objectClass=Computer)))

Fig. 8: Example of an import definition for LDAP import - display detail

Note on using SSL:

To establish an SSL connection to the LDAP server, the root certificate of the server has to be imported into the certificate store. This certificate store is to be indicated in the configuration (see fig. 7).

Moreover, the following entries must be made in the java.pol file on the Domino Server (this file might have to be newly created):

```
grant {
    //SSL LDAP Import
    permission java.util.PropertyPermission "javax.net.ssl.*", "write";
    permission java.util.PropertyPermission "java.net.ssl.*", "write";
}
```

5.1.1.6 JDBC import

To run JDBC imports periodically on the server, you have to store the corresponding JDBC drivers on the Domino server under <Domino-Programm-Pfad>\jvm\lib\ext. You have to restart the server when copying is completed.

Configuration	
SQL driver:	com.microsoft.jdbc.sqlserver.SQLServerDriver
URL:	jdbc:oracle:thin:@tethys:1521:XE
Login name:	cms
Password:	***
SQL Query:	SELECT * FROM cms.VUSERIMPORT

Fig. 9: Example of an import definition for ORACLE import - display detail

5.1.1.7 ODBC import

The installation of a DSN is required for an ODBC connection. This is executed via Start->Settings->Control panel->Administration->Data sources (ODBC).

jdbc:odbc is added to the name of the DSN (jdbc:odbc:DSNNAME).

Configuration	
Data source name:	jdbc:odbc:TestDSN2
SQL driver:	sun.jdbc.odbc.JdbcOdbcDriver
Login name:	sa
Password:	*****
SQL Query:	SELECT * FROM cmsbase.dbo.vUserImport

Fig. 10: Example of an import definition for MSSQL import - display detail

Information as to import definitions containing a password (LDAP, ODBC, JDBC):

The password will not be encrypted. Import definitions and the passwords saved therein are visible for persons and servers with [&R_MANAGER] role only.

5.1.1.8 Field assignment

The parameters as well as filter criteria required for the respective source can be entered here.

Furthermore the assignment of the fields (source – target) is defined and the field serving as a key for the source is determined. An update is made when exactly 1 document has been found matching the content of the key field of the source, i.e. this document must contain the source-key value in the target-key field. In this process the client membership is also considered.

Please note: By changing the target-key field the documents will be re-created, usually during the next import run, since the key field value is not contained in the new target-key field yet.

A special feature are 1:n links to other tables, the "cilocation" and "listcbsite" target fields. The ID (e.g. "cilocation_id" or "listcbsite_id") does not have to be used any longer for the link, but the name of the data record to be related can be assigned. The field name is specified as target field without the "_id" suffix. Example: Address: For target field, specify listcbsite. The name of the address must be contained in the respective source as specified in the address definition.

If these fields are imported, the respective data record will be related on the basis of the name.

Generally, the values of the target field are updated at each import provided that changes occurred in the source data set. This does not apply to undefined values and Standard contents.

Undefined values are values such as blanks, zero, etc. and are set by default in the field for undefined values. Undefined values are treated as empty strings. You can define if undefined values shall overwrite an already filled target field.

You can additionally determine if exclusively undefined values (blanks, zeroes, etc.) are to be overwritten in the target field by the import. Already filled values will not be changed in this option. This may occur if CI data are filled on the basis of two imports. The first import will fill only a part of the CI data, the second import – with worse data quality – will complete further CI data (the option "overwrite only undefined values" being activated in this import). Another use case: manual corrections shall not be overwritten.

Standard contents are field values that can be set as defaults irrespective of the data source. This is recommended for various status fields (StatNo = Status number, StatCheckNo = check status number). The default value is set only when the data record is created.

In case of LDAP imports of users who are to access the user portal via LDPA authentication the ExternalKey field must be filled with the Distinguished Name (DN). Only then will a successful login to the user portal be possible.

5.1.1.9 Periodical import agent

A periodical agent executes the defined import actions.

If the CI to be imported is not found on the basis of the key, the configuration of the update behavior will apply. Documents are re-created only in case of CUD - Create, Update, Delete - imports.

If a CI is found on the basis of the key, it will be updated provided that the field values have changed.

If the assignment is not clear because more than one document with the same key has been found, no document will be updated. A log entry indicates the existence of such documents.

Manually created CIs are updated by import agents, thus losing the manual flag.

A CI will be marked for deletion if it is not available in any data source of an active CUD-import any longer and has not been created manually. This may occur in the following cases:

- the CI is no longer available in the data source
- the import definition has been deleted
- the import definition has been deactivated
- the import definition has been changed from CUD-import to Update.

CIs marked for deletion can be displayed in a view. There the CI can be deleted finally and the deletion flag be removed.

The relevant changes or error messages will be logged separately in the log entries on the import definition. The colored flag in the view (green icon=error-free, red icon=faulty) shows if the import agent has run error-free. Errors can immediately be recognized in the log entries by the red font color. As regards software CIs, changes in the license No. field are made unrecognizable with ***.

5.1.2 Link definition

Automated linking and group assignment of CIs can be executed via Administration->CI Integration->Link Definition. This configuration is processed by an agent executing the assignment.

- You can create additional link types via the RELATIONS menu item. They are available immediately if you activate the REFRESH LINK TYPES button in the link definition.
- CI type1 will be assigned to CI type2 (see 5.1.3, link ID 1, 2 or 3) if the values of the two fields are equal.
- Assignment as group member (link ID: 0): CI type1 will be integrated into CI type2 group if the fields in CI type1 show the specified field contents.









Criteria		
	Field:	with field content:
Compare:	『 Category Location 』	『 Workstation Burghausen 』
add to group:	『 Workstation Burghausen 』	

Fig. 11: Criteria for automatic assignment of CIs to a group

5.1.3 Relations

You can specify relations as you wish. You can create different relations of the same type: e.g. as parent -> child relation “contains”, “supports”...

Several relation types are available:

Name	Description	ID	View icon	Visualization
Group -> Member	Grouping	0		
Parent -> Child	Hierarchical relation	1		
Parent <-> Parent	Redundancy; CI can be replaced by related CI, e.g. it can take over the tasks of the other CI	2		
Item – Item	Loose, unspecific relation	3		

5.1.4 Tools

Tools allow the configuration of any command-line programs. This is done by filtering according to CI type.

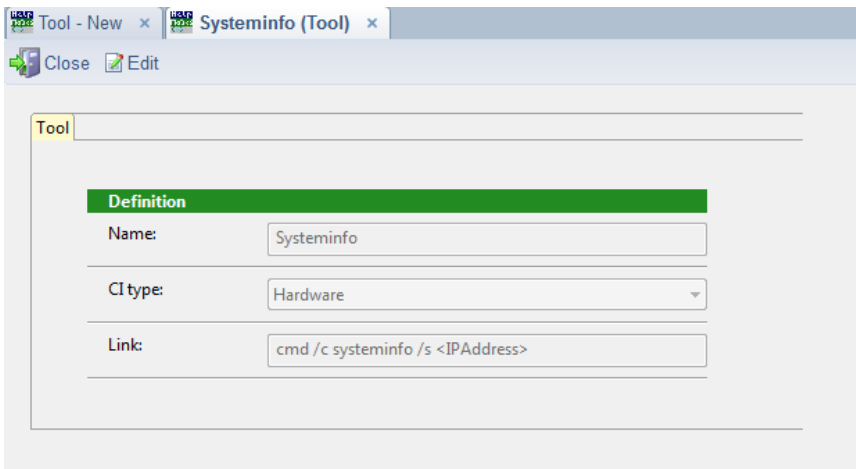


Fig. 12: Tool definition for hardware as CI type

Examples of valid link syntax:

- `cmd /c systeminfo /s <IPAddress>`
- `c:\windows\system32\mstsc.exe /console`
- `cmd /c start excel.exe`

Field names in angle brackets will be replaced by the respective field contents of the current CI.

5.2 Field configuration

5.2.1 Addresses

If required, an address can be assigned to a CI. Some address-related fields (SiteName, Location, Building) will be transferred into the CI. Location and building can be individually adapted in the CI.

Site documents cannot be deleted as long as related CI documents exist.

5.2.2 Selection values

Selection lists for some fields in CI documents can be defined there:

- CATEGORY: Category (CI-type-specific)
- MODEL: Model / licence name (CI-type-specific, category-specific)
- BUILDTYPE: Type (CI-type-specific, category-specific)
- VERSION: Version (CI-type-specific)
- MANUFACTURER: Manufacturer (CI-type-specific, category-specific)
- LANGUAGE: Language
- FLEXCOMBO_01 to FLEXCOMBO_05: configurable selection lists

If no document type (CI type) is indicated in the definition, the values will be available in the respective field of all CIs.

5.2.3 CI Layout

You can control by means of the CI layout which CI attributes (fields) are to be displayed at which point on the CI screen. Some fields such as CI-ID, CI name, status as well as the fields below "Organization" and "Address" are determined. Depending on the CI type, additional fields that are available in the screens can be configured. The configuration is stored as follows:

Setting	Description
CI type	The CI type (hardware, software) the configuration relates to
Category	Category-specific configuration is possible. Select the appropriate category. If no different representation depending on the category is desired, DEFAULT is entered. DEFAULT- configurations apply to CIs for the category of which no specific configuration has been stored.
Field name	Database name of the field (see 0). It is important to note that for the CI type the field is available on the database. Otherwise, the configuration will be ignored.
Quadrant	Number of the block where the representation is made (1= in the top left, 2 = in the top right).
Order No.	Order of fields within the block. Enter a number.
German description	Labeling of fields for German clients
English labeling	Labeling of fields for English clients

5.2.4 View columns

Via column definition, you define the columns or contents to be displayed for all available views.

These may be title, data alignment, position and width.

Moreover, you can define properties such as moveable, sortable and variable in size.

5.3 Templates

5.3.1 Service level

Access to service level templates.

For details, refer to the HelpMatics™ Admin documentation.

5.4 Clients

5.4.1 Definition

Client management within HelpMatics™.

For details, refer to the HelpMatics™ Admin documentation.

5.5 Modules

The basic configuration of your HelpMatics™ system is defined under Modules.

For details, refer to the HelpMatics™ Admin documentation.

Also see 1.3.

5.6 Maintenance

5.6.1 Messages

Here you find system messages generated by the server or by users.
It is the central point of analysis in case of errors.

5.6.2 Deletion flags

List of all CIs marked for deletion.

This flag may have been set by process editors or by import agents.

The deletion flag can be removed manually.

5.6.3 Deleted CIs

Here you find the log of finally deleted CIs.

Besides the CI name of the deleted CI, this log displays its CI ID, the process editor's name and the date of deletion.

Finally deleted CIs can only be restored by means of a database backup.

5.6.4 Automatic transfer of changes for CI service

You can assign a service level template to a service CI. If the name of the service level templates changes, that change will automatically be transferred to the CI. If configuration is made under MODULES, a history entry will be created.

Please note:

The changed service level template will be displayed in the CI service only after re-starting HelpMatics.

Furthermore, a periodic background process transfers changes as to service name / service level template to categories and templates connected with the service.

6 Imprint

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