HelpMatics™

Service Management System

HelpMatics™

Web Frontend Manual

1 Overview of HelpMatics™

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 handling, 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 frontends, 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

The HelpMatics™ web frontend has been optimized for Internet Explorer and Firefox in their current version.

1.3 Overview of features

The following overview shows you the services and functions offered by HelpMatics™ ServiceDesk and HelpMatics™ Knowledge:

- **Incident Management**
  Prioritization, categorization, status, deadline monitoring, creation of histories, creation of ticket templates for standard tickets, automatic transfer of e-mails into tickets etc. ensure effective and fast processing.
- **Problem Management**
  Option of opening problem tickets, separate problem reporting.
- **Resource management**
  User and configuration item management in 3 levels (User > configuration item > Sub-configuration item). Supports the import from or connection to existing systems.
- **Workflow Management**
  Forwarding, group and processing management, option of integrating Notes Mail or MS Exchange possible.
- **Escalation Management**
  Escalates according to the underlying SLA's (Service Level Agreements); in addition, warning levels can be individually configured as specified by the underlying SLA's
- **Knowledge Management**
  Easy generation and use of an integrated knowledge base
- **Information Management**
  Central distribution of information, e.g. for changes, info display with the latest messages
- **Multi-client capability**
  Definition of clients for companies, locations, departments with individual SLA's, client-specific ticket processing and reporting
- **Web front-end**
  All important functions for ticket processing are also available in the Web frontend.
- **Languages**
  Available in different language versions; easily expandable to any languages you like
- **Enterprise Setup**
  Special settings support global support structures by the option of specifying the availability of tickets, master data, SLA´s etc.

1.4 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.

1.5 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 support areas.
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:

....

1.6 Navigation

The basic structure of the HelpMatics™ Web client divides the screen into:

- a main navigation within the individual HelpMatics™ modules in the upper section
- a module-specific menu on the left.

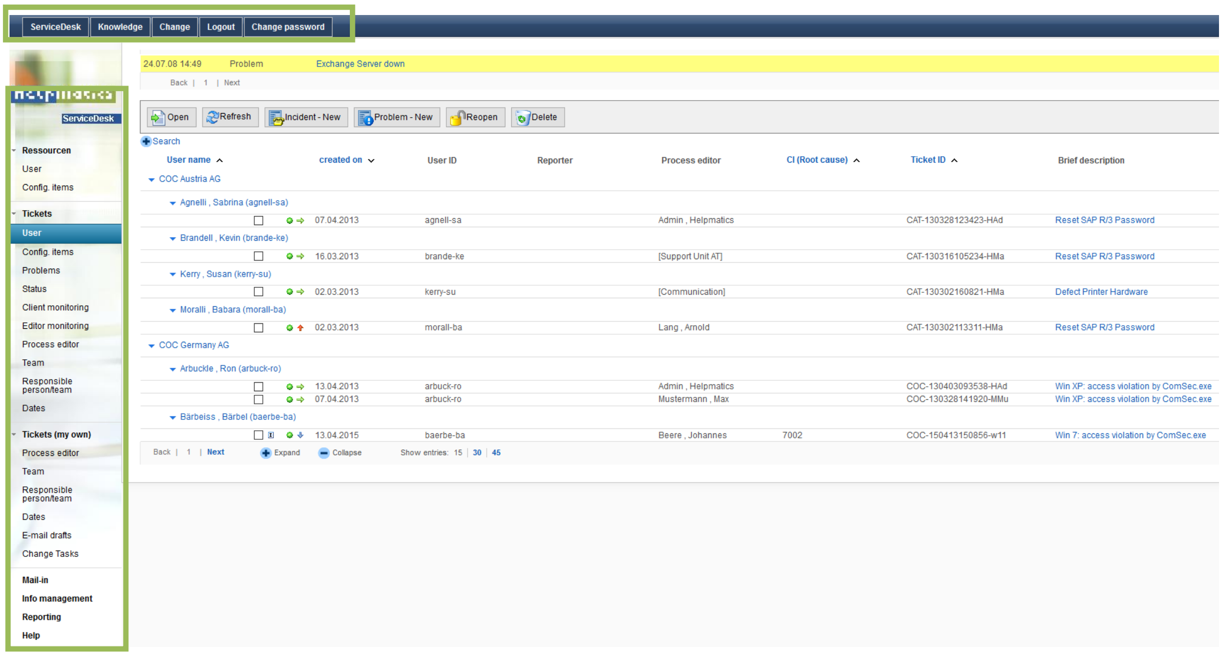


Fig. 1: Navigation for the ServiceDesk module

The ServiceDesk (incl. Resource Management) and Knowledge modules are available in the HelpMatics™ Web Suite. If you want to extend the Web Suite, the CMS and/or Change modules can be optionally added.

You log off from the HelpMatics™ Web client by clicking the LOGOUT BUTTON.

Change your password via CHANGE PASSWORD.

2 HelpMatics™ ServiceDesk and Resource management

2.1 Info Board, Action bar and Search

The Info Board in the upper section of the display shows current info delivered by the Info Management.

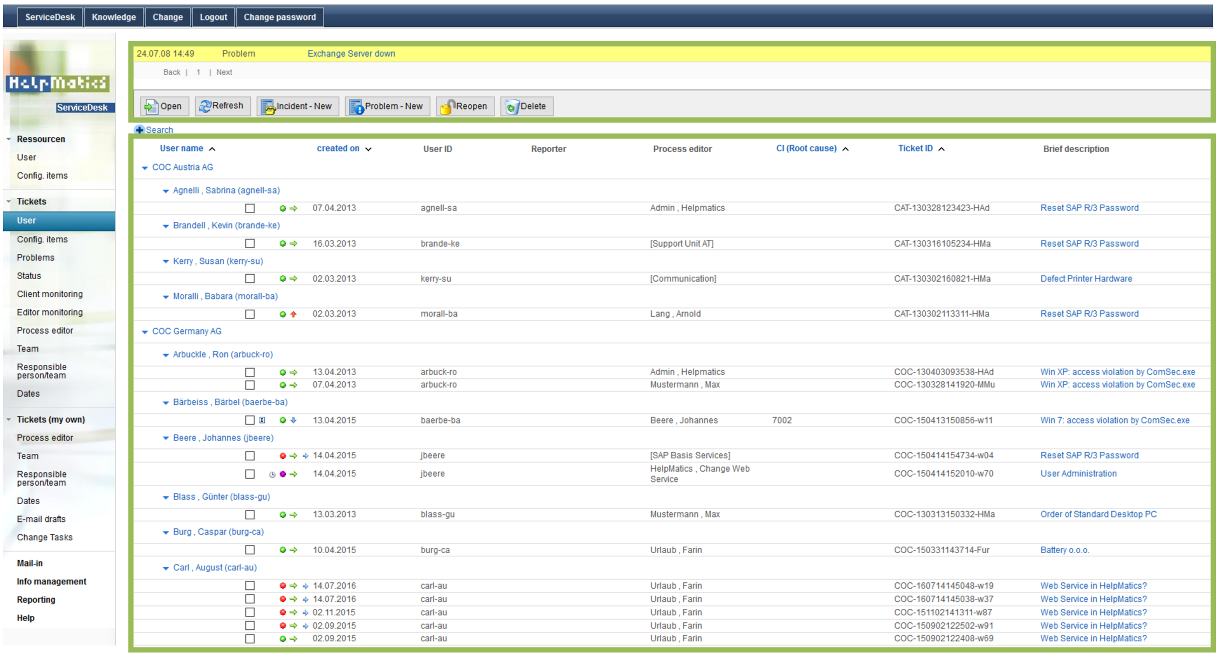


Fig. 2: Info Board (at the top) and Viewer (at the bottom)

Below the info management you find the viewer where the information selected via the navigator is displayed. By double-clicking a line you can edit information and change it depending on the type of information.

Below the Viewer, you will find the page shift buttons Back | 1 | Next

as well as the number of documents displayed per page Show entries: 15 | 30 | 45

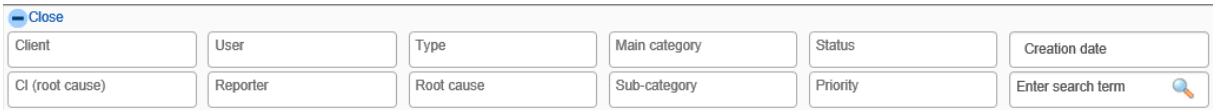
The action bar, search and information are in the viewer. Each view offers various actions for recording and editing information and requests. Action bar and search are always to be found at the same place.

2.2 Search

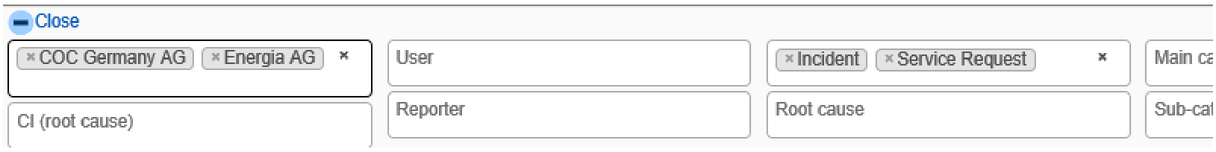
You can search in all Resources and Tickets views. The search principle is the same in all views. Only the search fields differ in the individual views.

You'll find the search below the action bar. Open the search via Search and close it via .

In the TICKETS and TICKETS (OWN) areas, an optimized search with selection options is integrated. Selecting a search term starts the search.



Within a search field, the selected search terms are linked with OR, an activation of several search fields creates an AND link.

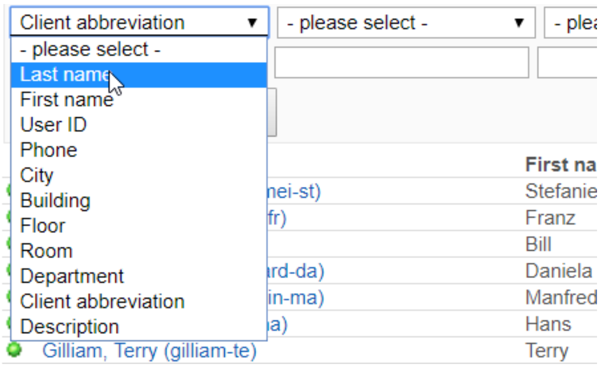


This figure shows a search for all tickets with client COC Germany AG or Energia AG and type Incident or Service Request.

In the ENTER SEARCH TEXT field you can enter search terms as well as Notes search commands (e.g.: [ProblemShort] Contains SAP).

Use the drop-down box in the RESOURCES views to search for contents in the fields, e.g. for "Burghausen" in the Location field. You can use * as a placeholder.

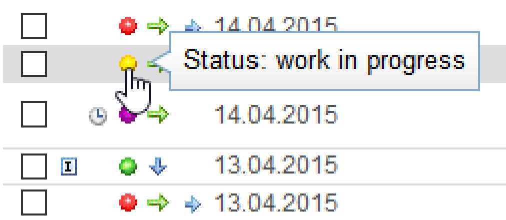
For full text search, you can enter either search terms or Notes search commands, e.g. FIELD LOCATION CONTAINS BURGHAUSEN. The CLEAR RESULTS button resets the search results.



2.3 Icons in the views

Icons play an important role in the views of HelpMatics™ since they display information in a compressed way. In order to work efficiently with HelpMatics™, you should first memorize the mostly self-explaining icons.

When you hover over an icon a brief explanation appears. The following tables explain the icons used as well as their meaning.



2.3.1 Priority

The priorities are transferred according to the settings under ADMINISTRATION > CLIENTS > DEFINITION.

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

2.3.2 Forwarding and returning tickets

Forward	Icon	Meaning
WORKFLOW > PROCESS EDITOR WORKFLOW > PROCESS TEAM	or	forward to process editor or process team
WORKFLOW > BACK TO RESP. PERSON/TEAM		closed / user informed
WORKFLOW > BACK TO RESP. PERSON/TEAM		closed / user not informed
WORKFLOW > BACK TO RESP. PERSON/TEAM		further processing required
WORKFLOW > BACK TO RESP. PERSON/TEAM		incorrect ticket assignment

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

2.3.3 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.

2.3.4 Status

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

2.3.5 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	

2.3.6 Ticket type

Icon	Meaning
	master ticket or master info
	sub-ticket
	problem ticket
	Incident ticket
	Service requests are displayed without an icon.

2.4 Resource management

The Resource management provides comprehensive standard functions for user and configuration item management. If you use the more comprehensive HelpMatics™ CMS module, other features described in chapter 2.5 are available.

2.4.1 User

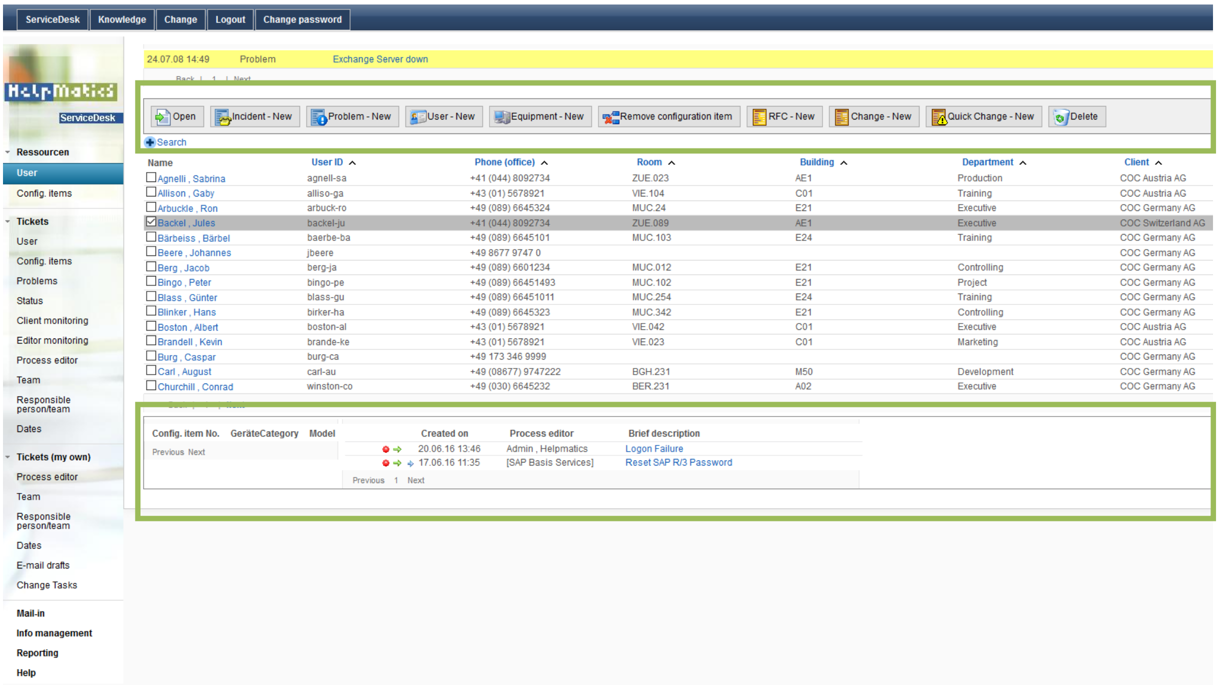


Fig. 3: List of users incl. display of associated CIs and tickets

In the Navigator you can see the User navigation item below the Resources category. By clicking USER the corresponding view will be displayed in the Viewer.

This view displays all users supported by the helpdesk, sorted by the users' last names.

To select a user, tick the corresponding checkbox in the first column. Based on this selection you can perform the desired action, e.g. INCIDENT – NEW.

The lower section, moreover, displays the configuration items and tickets assigned to the user. When you select another user, the display of the lower section will be refreshed.

The USER-NEW AND CONFIG. ITEM -NEW (SOLO) actions can be performed irrespective of the document selection.

2.4.2 Description of the individual actions

- Use a double-click to open a document in the list.
- Use INCIDENT - NEW to create a new Incident ticket for a selected user or an assigned CI. When you create a ticket on the basis of a CI assigned to a user, the CI will be transferred as a CI (ROOT CAUSE).
- Via the USER - NEW button you can create a new user. A new window opens in which you can enter the user data:

  1. Enter the necessary data.
  2. If you want to use a specific priority for each ticket created for a user, set the specified priority to YES and select the desired priority via the button. This setting will be applied to all configuration items assigned.
  3. In the COMPANY tab you have to assign a client to the user and can then enter further company-specific data.
  4. Subsequently, click the SAVE and CLOSE buttons.
  5. After having saved a new user, you can create a new ticket for this user via the INCIDENT - NEW button or assign a new configuration item to this user via the ASSIGN CONFIG. ITEM button.

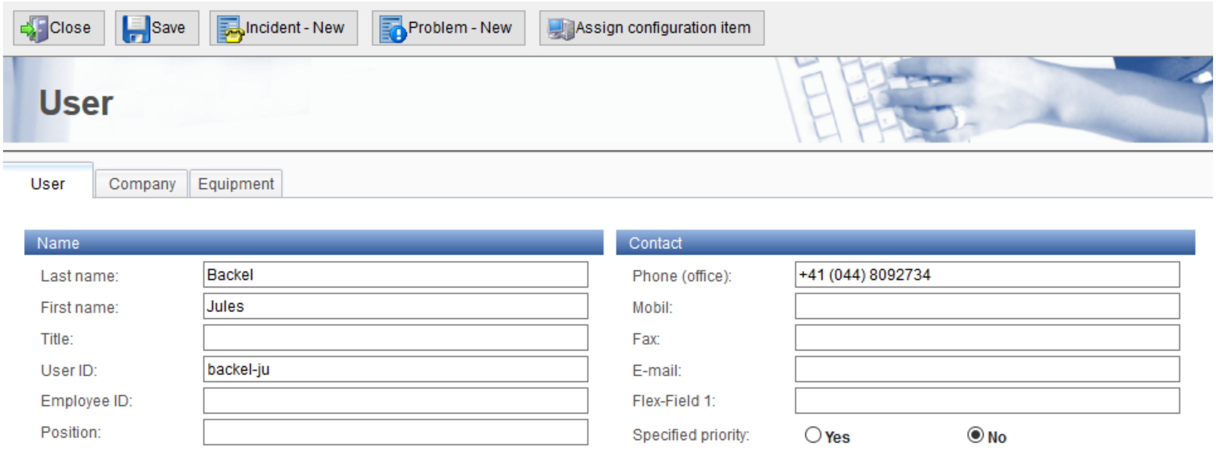


Fig. 4: Screen for creating a new user

- In the EQUIPMENT tab you can create new config. items. Differentiation is made between creating
  - a configuration item not associated with a user via the CONFIG. ITEM - NEW (SOLO) action or
  - a configuration item as a sub-configuration item for the selected user via the CONFIG. ITEM - NEW (for selected document) action

  A new window opens where configuration item data is entered.
- If you have the appropriate rights, you can delete documents permanently via the Delete action.

2.4.3 Config. items

The RESOURCES > CONFIG. ITEMS view displays all configuration items supported by the helpdesk, arranged by name.

This view also allows you to perform various actions via the buttons of the action bar:

- WITH INCIDENT - NEW you can create a new incident ticket for the selected configuration item.
- You can create new configuration items using the CONFIG. ITEM -NEW (SOLO) OR CONFIG. ITEM - NEW (FOR SELECTED DOCUMENT) button.
- Having saved the new configuration item, you can create an Incident for it or assign a sub-configuration item to it.

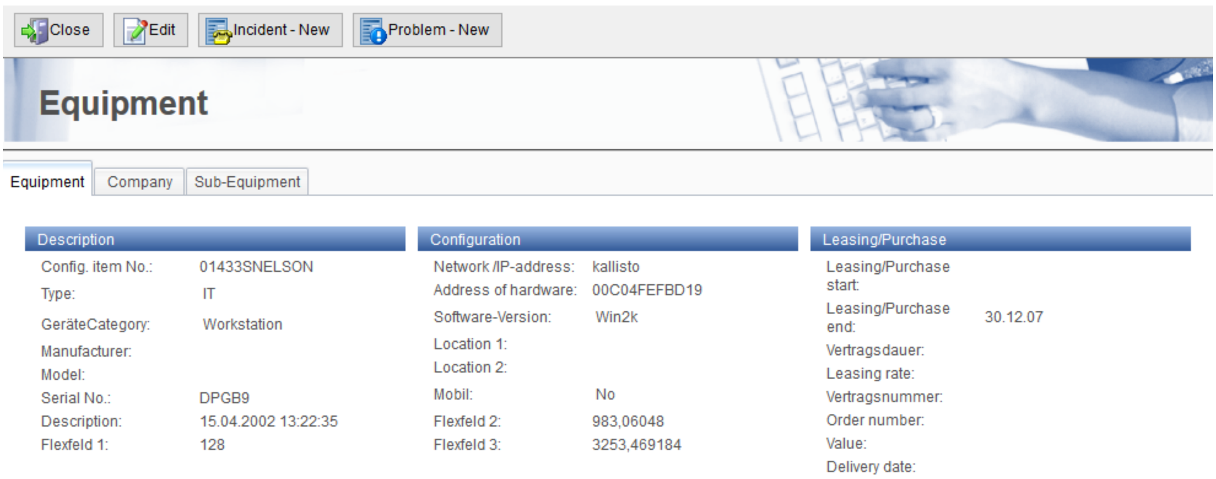


Fig. 5: Config. item screen

2.5 Ticket screen design

In this screen, all information relating to a ticket is displayed and can be edited.

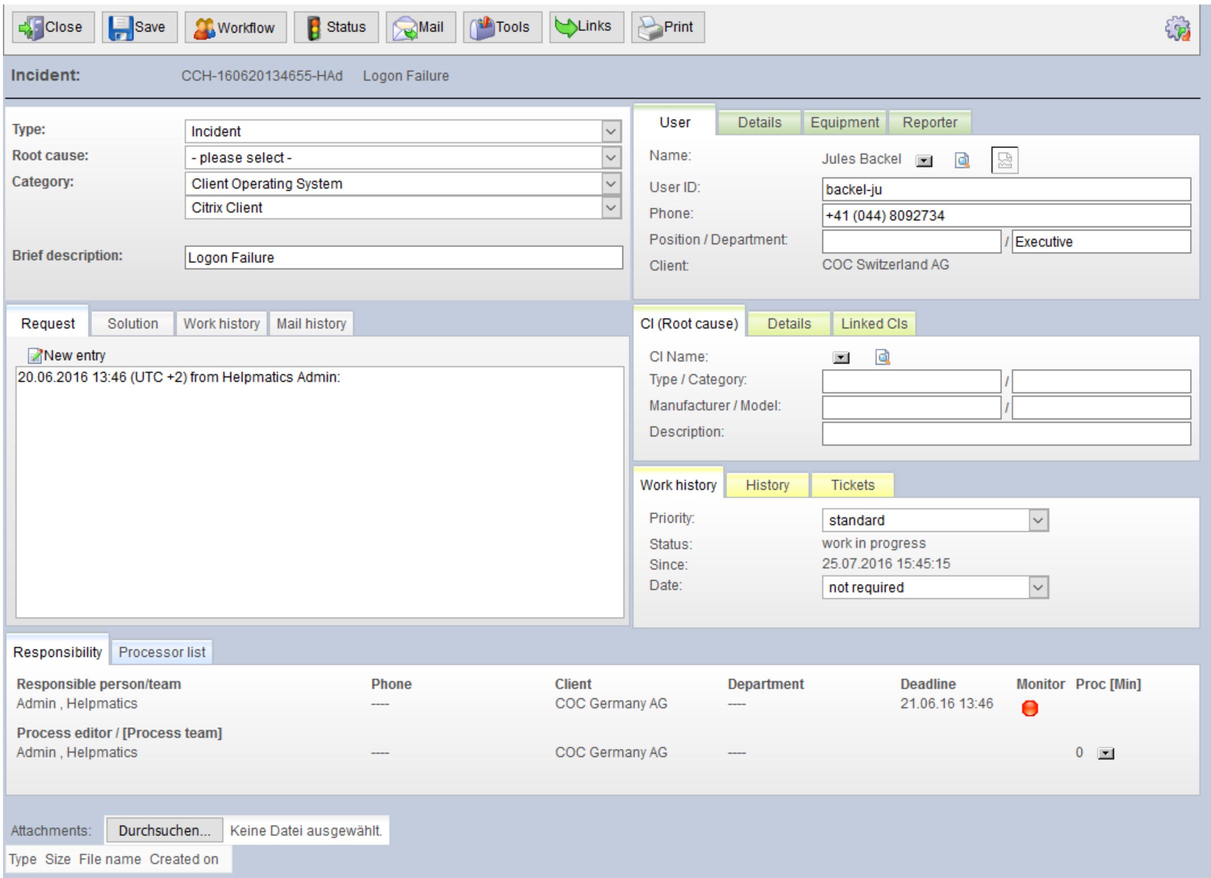


Fig. 6: Ticket screen

2.5.1 Ticket information

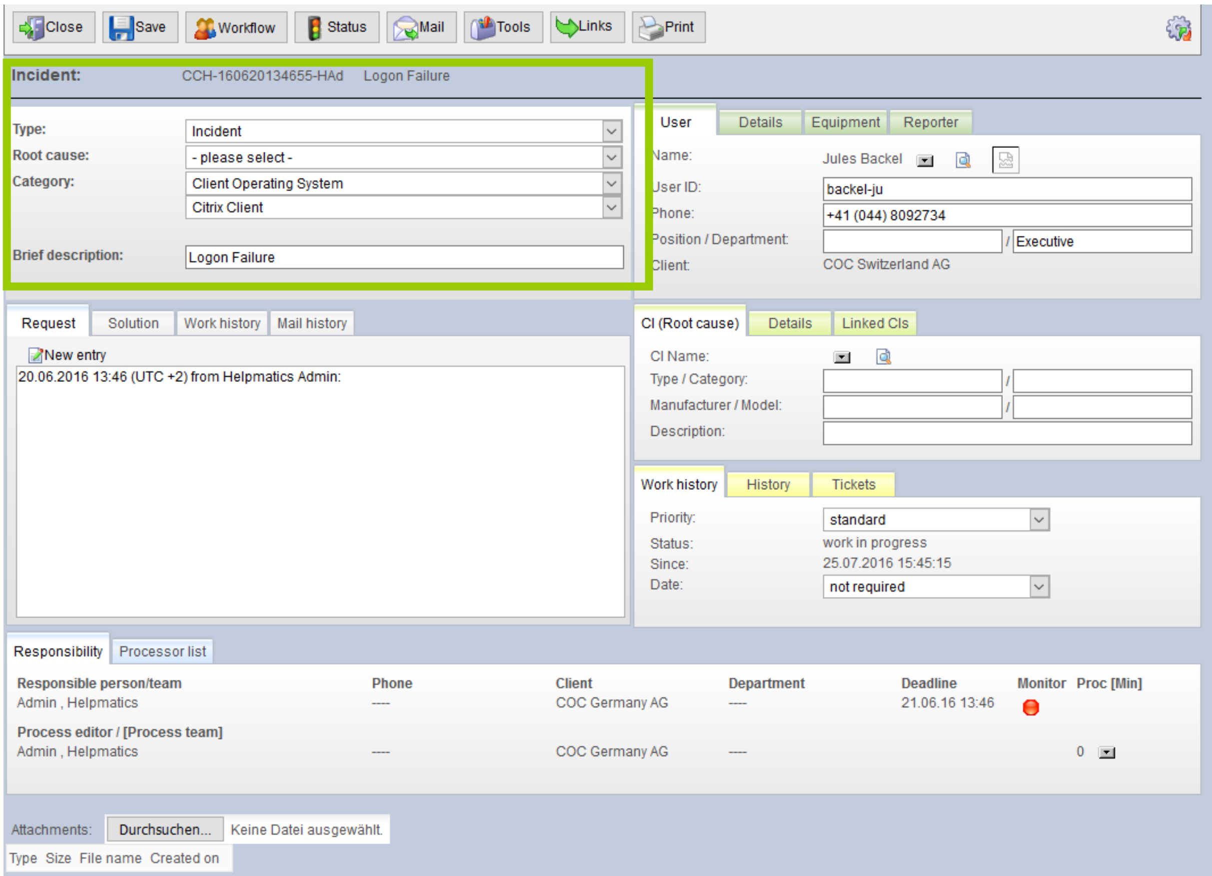


Fig. 7: Ticket information

This area contains information on Ticket ID, Brief Description, Categories and Type and Root Cause of a ticket.

ENTERPRISE:

If you have selected a global category, you find the availability control below the brief description: LOCAL (by default, in the current database only), CENTRAL (in local and global databases) and GLOBAL (in all databases).

In case the ticket is forwarded to a process editor of another client, relevant messages referring to the change of availability will be displayed.

It is not possible to downgrade availability after saving the ticket (e.g. from global to local).

2.5.2 User information

Data relating to a user is displayed here. You can edit the entries in the fields. If, however, you change data, the changes will only affect this ticket. To change the user profile permanently, go to RESOURCES - USER, select the respective user and open the user data with a double-click.

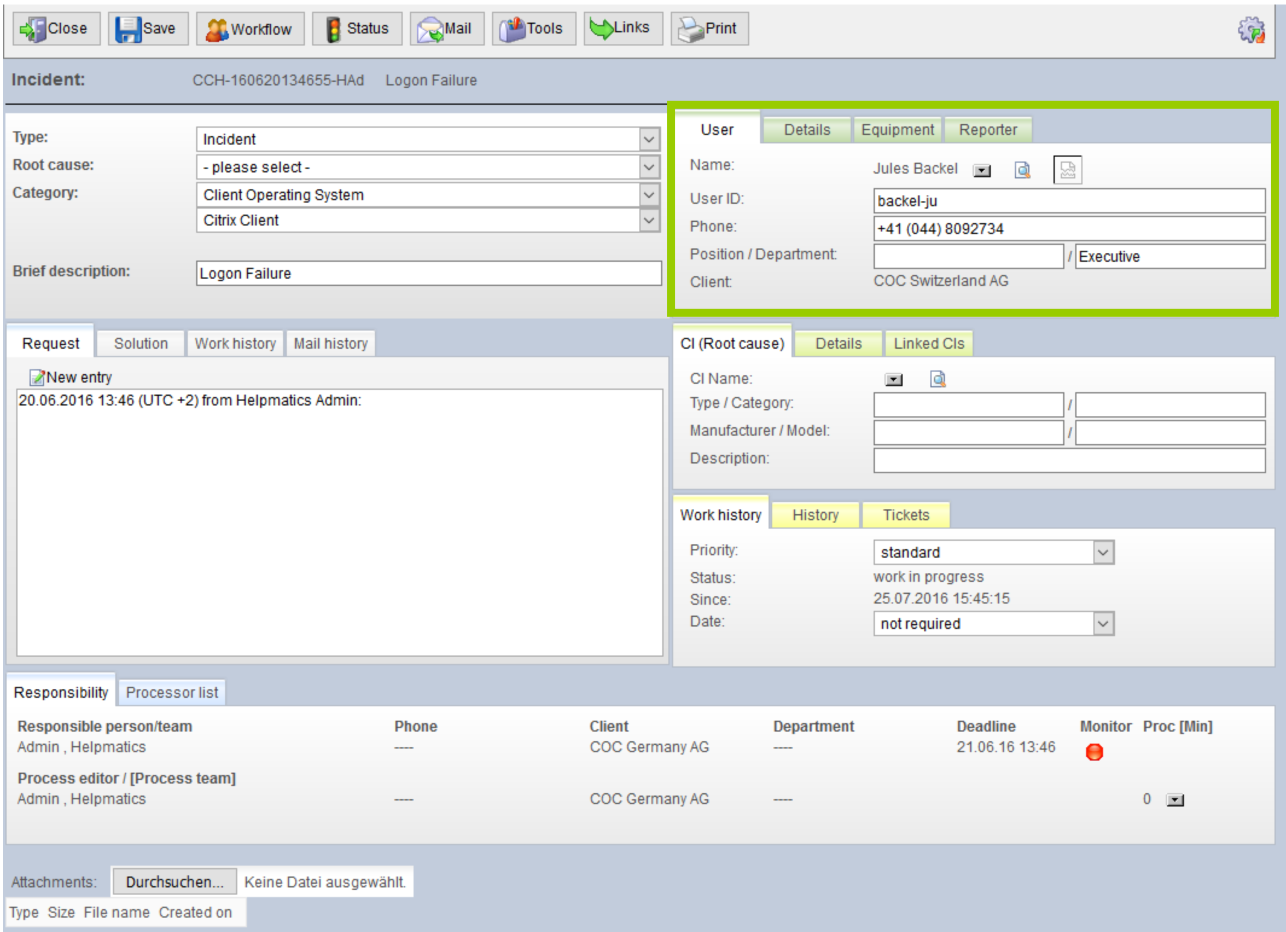


Fig. 8: User information

Next to the user's name you will find a button for selecting a user. It allows you to assign a new user to the ticket.

If you change the user to a user of a different client, the priority will be emptied. The priority values of the new client will then be offered for selection.

Use the REPORTER button to store additional information on the person reporting the incident.

2.5.3 CI Information

Here details on the associated CI are listed, such as device Category, Type, Model, Location, Software Version or inventory. These can also be edited manually or be reassigned.

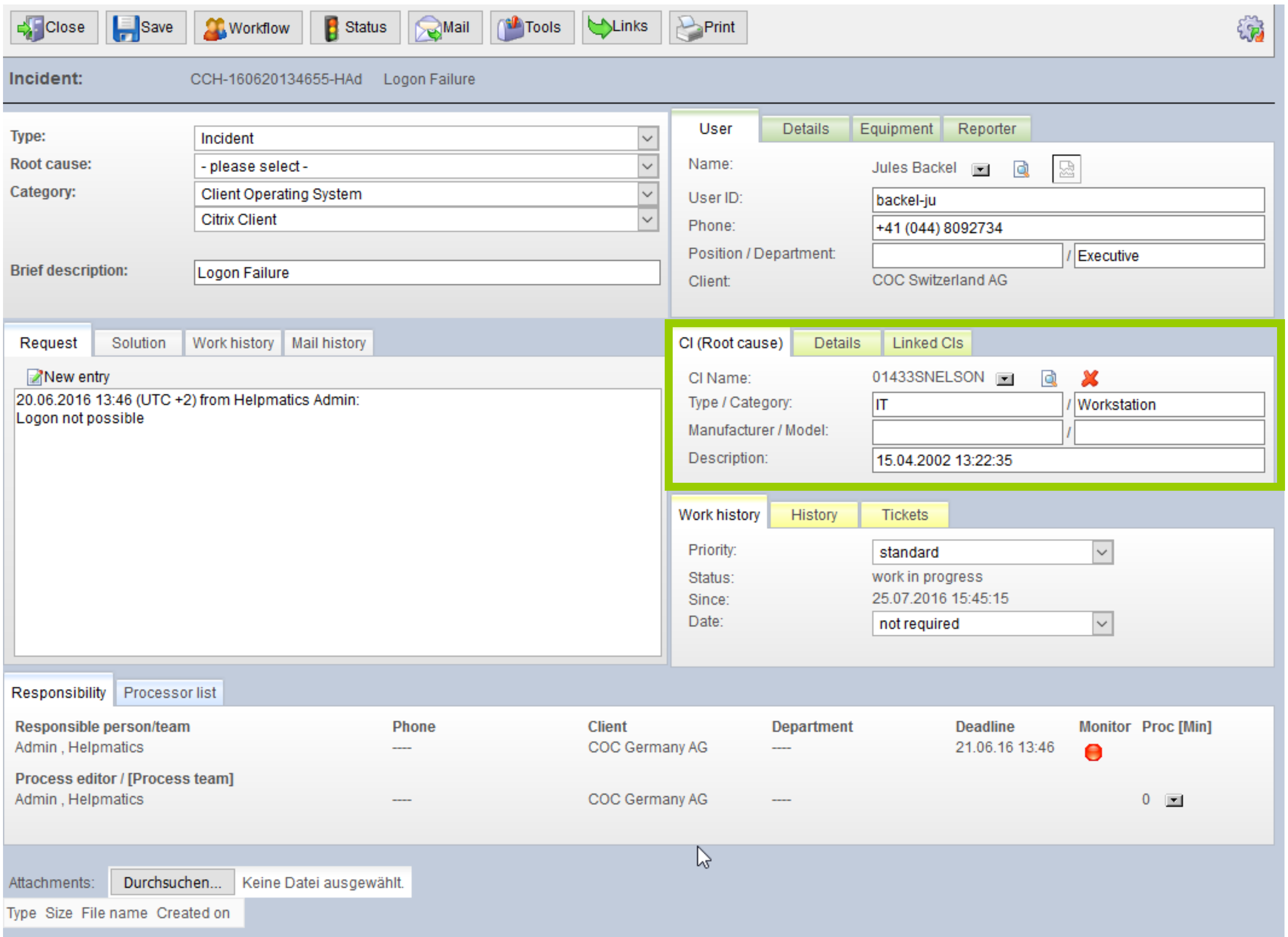


Fig. 9: Configuration item information

2.5.4 Ticket processing information

The WORK HISTORY tab shows you, among others, the priority of a Ticket. This can be changed, if necessary. Moreover, a date can be defined (also see 0)

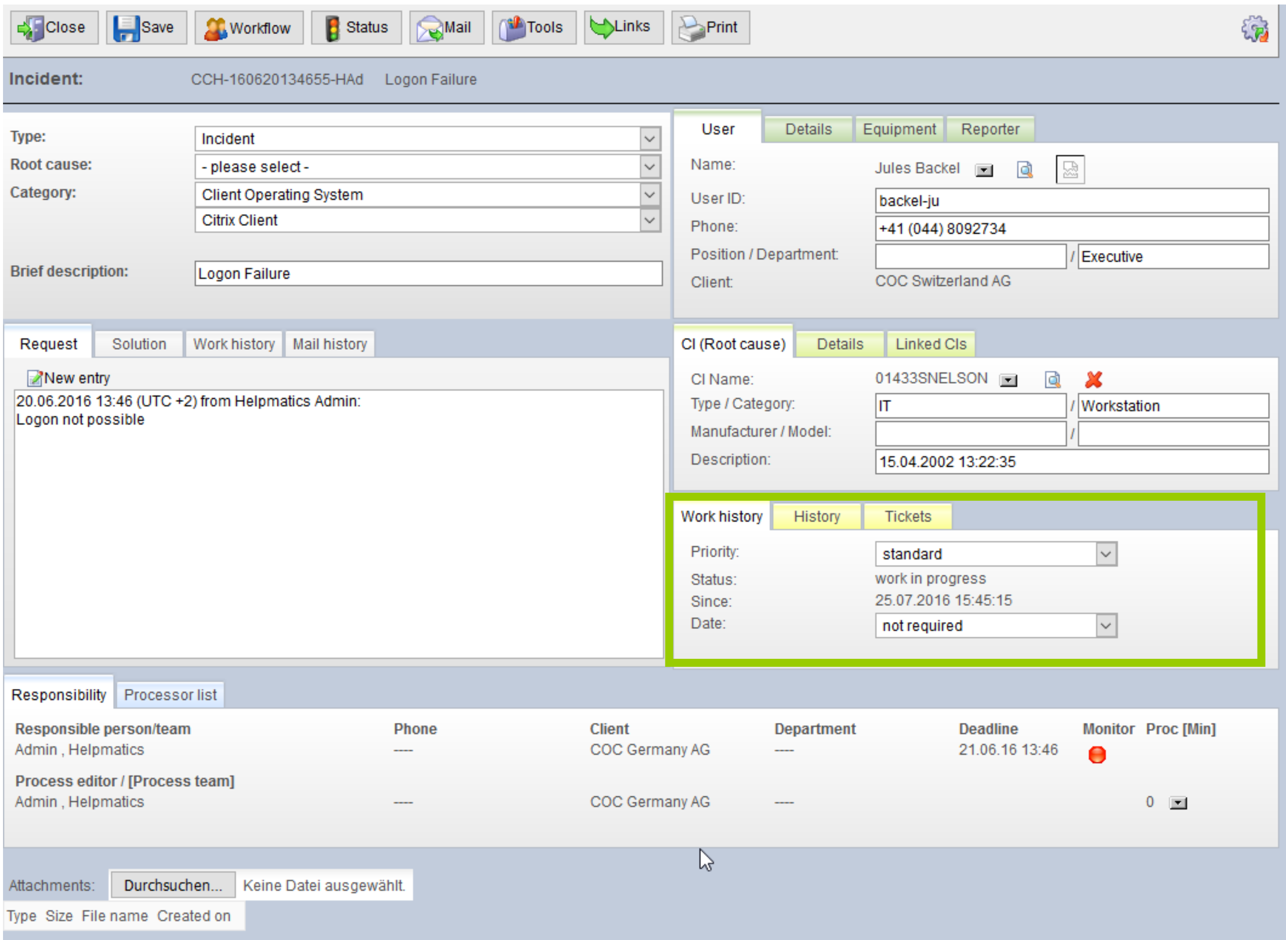


Fig. 10: Ticket processing information

2.5.5 Ticket history

The HISTORY tab displays the changes of PRIORITY and STATUS recorded in the course of ticket processing. No changes can be made there.

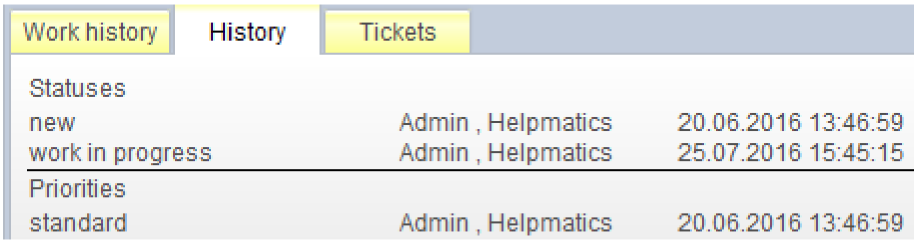


Fig. 11: Ticket history

2.5.6 Document links

Ticket links to other Incidents, Problems, RFCs and Changes are listed in the separate tab TICKETS now. This makes the process chain more consistent and transparent and interconnections immediately recognizable.

2.5.7 Ticket responsibility

In the RESPONSIBILITY tab you can see the responsible person/team and the current process editor. The PROCESSOR LIST tab shows you the course the ticket has taken at the service desk. You can see who processed this ticket at what time. The process editor currently logged in can enter the time he/she needed for processing the ticket in minutes. Click the small button next to the PROC.[MIN.] column.

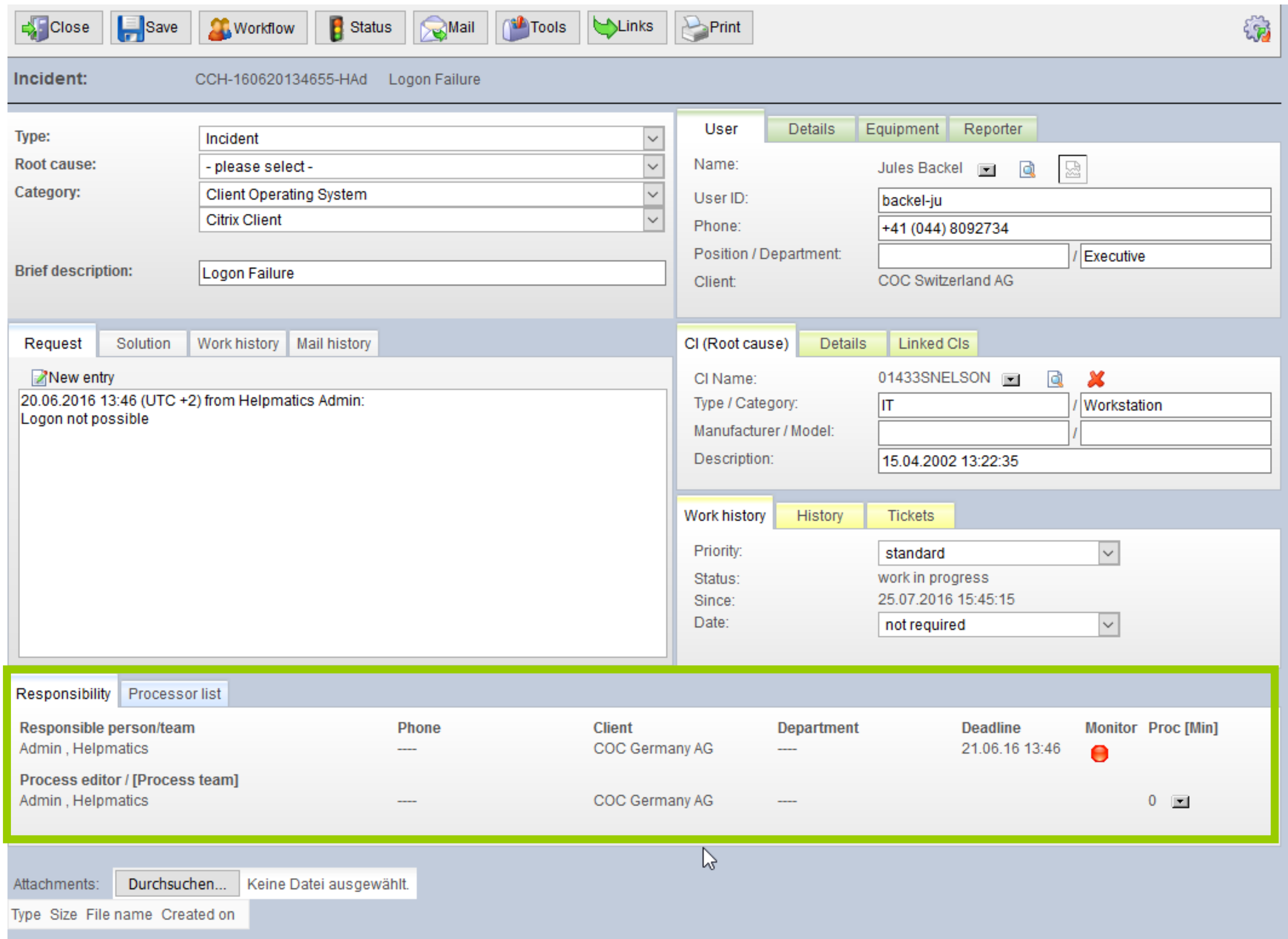


Abbildung 12: Responsibility and processor list

In the RESPONSIBILITY tab (responsible person/team and current process editor) an icon (see table below) is displayed in the responsible person/team row next to DEADLINE. Depending on the monitoring status (as defined in the SLA) of the ticket, the different monitoring levels are represented in different colors in order to highlight when the specified deadline has been exceeded. The same representation is used for process editor monitoring (PROCESS EDITOR/[PROCESS TEAM] row) – if activated in the process editor documents.

Monitoring level	Icon
MONITOR IN TIME / Status [on hold]	
MONITORING IN TIME	
MONITOR LEVEL 1	
MONITOR LEVEL 2	
MONITOR LEVEL 3	

2.5.8 Request

You can enter your request in this area.

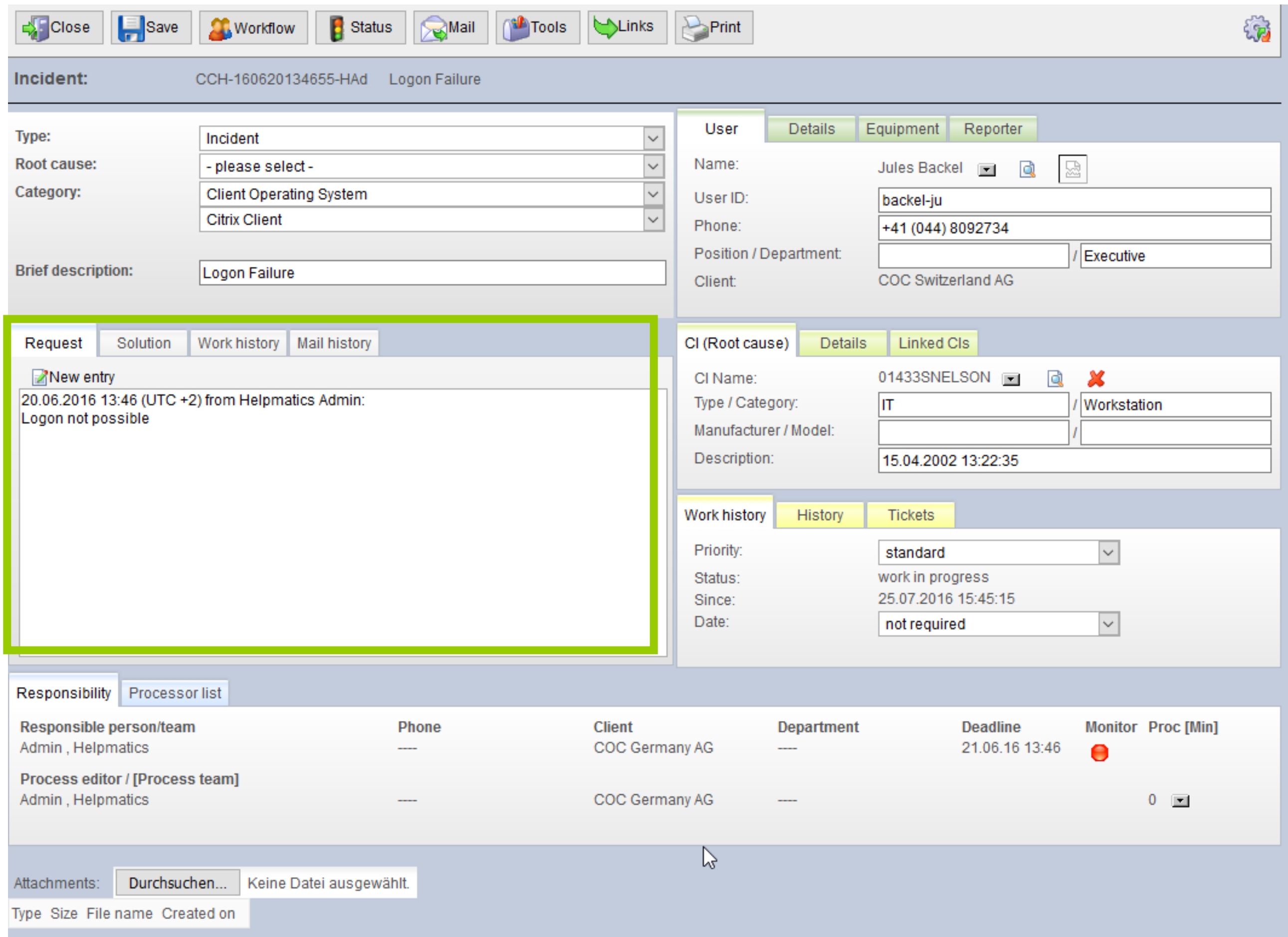


Fig. 13: Request entry

2.5.9 Solution

You can enter the solution description in this area. Use the NEW ENTRY icon in the SOLUTION tab to enter time and name in the solution window. Thus a click on NEW ENTRY above the solution window will cause an entry such as 11/30/2012; 2:27 PM (UTC +1) by Claudia Madl if this is the first entry in the field. If not, a dividing line will be inserted before the actual entry.

If you want to see this incident in the Knowledge Base after it has been resolved, tick the KNOWLEDGE checkbox in the solution window.

2.5.10 Work history

In addition to the REQUEST and SOLUTION tabs, the WORK HISTORY tab is available in the Standard Edition. This tab is used for recording the complete action history necessary for finding a solution.

2.5.11 Mail history

In addition to the REQUEST and SOLUTION tabs, the MAIL HISTORY tab is available in the Standard Edition.

The complete mail traffic – if created via the ticket - is displayed there in an embedded view. Mails can be opened directly from the ticket. You can send replies from an opened e-mail unless the ticket has the status CLOSED.

2.6 Creation of Incident tickets

2.6.1 Assignment to resources

A ticket is created on the basis of the user and configuration item data recorded in HelpMatics™.

Via INCIDENT - NEW you can create a new Incident Ticket for the selected configuration item or User. First select the configuration item/User by putting a checkmark. The user and configuration item data will be taken over from the existing ticket.

2.6.2 Ticket contents

(also see 2.5 Ticket screen design)

To save a ticket, at least the mandatory fields CATEGORY and BRIEF DESCRIPTION must be filled in. Further important ticket settings are listed below. You can also transfer parts of them from templates (see 2.7.1 Template).

- The CATEGORIES classify the caller's request and facilitate forwarding it to experts.
  Select a main category first. Subcategories 1 and 2 depend on their superior category, i.e. only if you select e.g. Software as main category, will MS Office be displayed.
- Assign a TYPE to the ticket. The type selected may have an influence on the root causes displayed for selection. When you select a type, this may cause the root cause field to be emptied if there is no link between type and root cause. Then you have to newly assign a root cause.
- Select a ROOT CAUSE from the list. The terms that are available for selection are defined by the Administration. Depending on the configuration, various root causes may only be available for certain types. The entry of a root cause is required for closing a ticket.
- PRIORITY shows the urgency of a ticket and/or the expected impacts of the Incident. It can be selected from a list via a dialog box. Usually, standard priority (see 2.3.1) is set by default. Exception: A specified priority has been defined for the user in the user data. In this case the priority as stored in the user data will be set and will be clearly identified as specified priority.
  For the current ticket the default priority can be adapted to the process requirements by the process editor. As a result, the ticket will no longer be identified as having a specified priority. If you create a new ticket based on this ticket (e.g. in the TICKETS – USER view), no specified priority will be set.
- THE PROCESS EDITOR may be a person or a group of people entered in the processor lists. Clicking the WORKFLOW – PROCESS EDITOR OR PROCESS TEAM button, you can select from the list of all process editors or teams.

2.6.3 Closing a ticket

A ticket can be closed by setting the status in the action bar to Closed.

The following dialog will be displayed when saving a closed ticket – if the corresponding setting has been made in the client document:

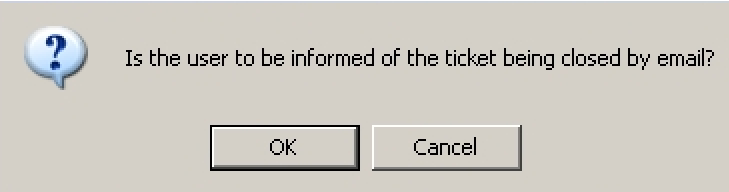


Fig. 14: Mail notification when a ticket is closed.

In the case of an immediate ticket solution no mail notifications will be sent to the user.

2.6.4 Taking over a ticket

If you want to edit a ticket you have not created or which has not been assigned to you, you will be asked – after clicking Edit - if you want to take over the ticket. After confirming with Yes you can make your entries and save them. You will now be displayed as process editor in the processor list.

As person/team responsible for a ticket you can make entries without taking it over. This is also possible if you have been granted extended rights in HelpMatics™.

2.6.5 Opening a closed ticket

You can view closed tickets by double-clicking them in the corresponding view. Editing closed tickets is not possible.

2.6.6 Reopening tickets

If you have the appropriate rights, you can reopen a closed ticket by clicking the Reopen button. The ticket will then get the work in progress status.

2.6.7 Master tickets

All processing steps can be documented in the master ticket. Editing sub-tickets is not necessary.

When a Master Ticket is closed, the assigned Sub-Tickets will also be closed and the following data will be updated in the Sub-Tickets:

- Type
- Category
- Brief description
- Request and solution description (the transferred text will be marked).
- The person in charge of the master ticket will be appointed process editor and person responsible for the sub-ticket.

This does not apply to Sub-Tickets that have already been closed manually.

2.6.8 Scheduled tickets

Scheduled tickets are service requests that, if required, are created using a ticket template and become active at a fixed point in time. Scheduled tickets are marked by a gray icon in the overviews

2.7 Working with tickets

On the action bar of the Ticket screen and/or in the Ticket you can perform various actions, which are described in the following. Please note that only resp. persons/teams, process editors and Administrators can change to the edit mode.

2.7.1 Template

The action bar of new tickets shows the TEMPLATE button. Depending on whether a category has been selected or not, this button provides a list of ticket templates depending on the configuration. After selection of a template, its contents will be copied into the ticket. This facilitates and shortens the process of creating Standard Incidents.

2.7.2 Categorization

Choose TYPE, ROOT CAUSE and CATEGORY via the select fields. New categories and types can only be created by the ADMINISTRATION (in the Notes client).

TICKET TYPE

You can assign a ticket type there. The type selected may have an influence on the root causes displayed for selection. When you select a type, this may cause the root cause field to be emptied if there is no link between type and root cause. Then you have to newly assign a root cause.

ROOT CAUSE

Select a root cause from this list. Depending on the configuration, various root causes may only be available for certain types. The entry of a root cause is required for closing a ticket.

TICKET CATEGORY

Via this window you can select main and sub-categories.

2.7.3 Workflow

Here the process editor or the process team as well as the status of the returned tickets is selected.

PROCESS EDITOR

By clicking process editor and selecting from the new window, you can assign the ticket to another process editor.

PROCESS TEAM

A process team is selected e.g. when the ticket is passed on to the 2nd level.

BACK TO RESPONSIBLE PERSON/TEAM

This action is used to return the ticket to the resp. person/team together with a note on the processing status that is selected from a dialog box. In the ticket views the status is identified by an icon (see paragraph 2.3.2), in the processor list it is displayed as a numerical value (see Fig. 15).

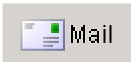

Responsibility | Processor list

Process editor / [Process team]	Phone	Client	Department	Assigned	Back	Proc [Min]
Madl , Claudia	376	COC Germany AG	Development	21.06.2013 11:18	-	0
[Operative Service]	----	COC Germany AG	IT-Service	21.06.2013 11:18	-	0

Fig. 15: Processor list with returned ticket status

Returned ticket status	Value in the BACK column of the processor list	Icons in the views
CLOSED / USER INFORMED	3	
CLOSED / USER NOT INFORMED	2	
FURTHER PROCESSING REQUIRED	1	
INCORRECT TICKET ASSIGNMENT	0	

2.7.4 Mail



Using this button you can send notifications via e-mail.

If several Mail Templates are stored, they will be displayed for selection in a selection window.

Mails sent via this button are displayed in the MAIL HISTORY tab.

Mails saved as draft can be viewed, processed and sent under TICKETS (MY OWN).

2.7.5 Tools

Via this button programs can be started. It is possible to transfer data from the Ticket (e.g. a Ping to a configuration item). Whether the IP-address or the configuration item number is used can be specified in the administration.

This button generates a batch file, which can be saved and run locally.

2.7.6 Print

By using this button you can print the opened ticket in print view.

2.7.7 Button for extended functions

The process owner or team will be changed by clicking the button on the right in the menu bar, the appropriate authorization provided.

Usually, the responsible person is the person who created the ticket. Via RESPONSIBLE TEAM the responsibility can be placed on a process team.

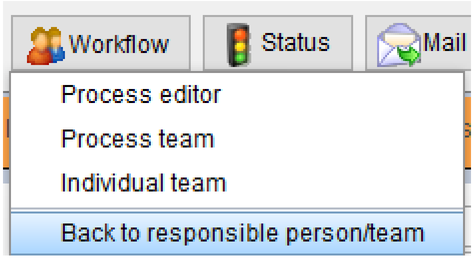
2.7.8 Problem Management

Linked tickets are displayed in the TICKETS tab and can be opened by double click.

Forward to an individual process team

Problem tickets can be forwarded to individually composed process teams. This team is responsible for the particular problem ticket only.

You enter the name of the individual process team, its members and the mail notification option in a separate window.



2.7.9 Status

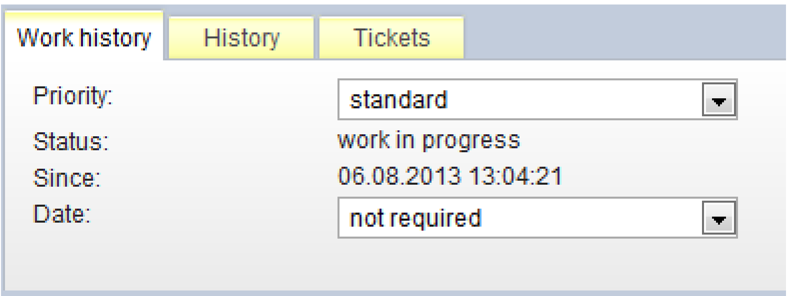


Fig. 16: Information on ticket processing in the Work History tab

The status is displayed in the WORK HISTORY area. You can change the status via the STATUS button in the action bar.

ON HOLD status allows you to stop the process time. In this case you have to enter a date.

The CLOSED status is not available to 2nd level team members.

In the following cases the status will be changed automatically:

Action:	New status:
A ticket with OPEN status is saved for the first time.	WORK IN PROGRESS
A date is entered in the ticket and saved. The user is asked if the status is to be set to ON HOLD.	ON HOLD (optional)
A check is made in the background as to whether the dates entered in the ticket have been exceeded. If a date has been reached, the status will be set to WORK IN PROGRESS (except for sub-tickets) and the process editor in charge will be informed via e-mail.	WORK IN PROGRESS
The status of a master ticket is set to CLOSED and saved: All sub-tickets assigned to it will also get the CLOSED status.	CLOSED

2.7.10 Dates

If you enter a date in the Ticket, it is recommended to set the status to ON HOLD. In this way, the time until the date is reached will not be calculated as process time. If the status is set to ON HOLD, a date has to be fixed. After the expiration of the date, the process editor will receive a reminder. At the same time the status will be set to WORK IN PROGRESS again. This does, however, not apply to sub-tickets.

2.8 Selecting existing tickets

2.8.1 Tickets (my own)

In the Navigator you find the TICKETS (MY OWN) section. The ticket information identifying you as process editor or responsible person is displayed in four different views.

The TARGET DATE can be colored based on the configuration and monitoring level.

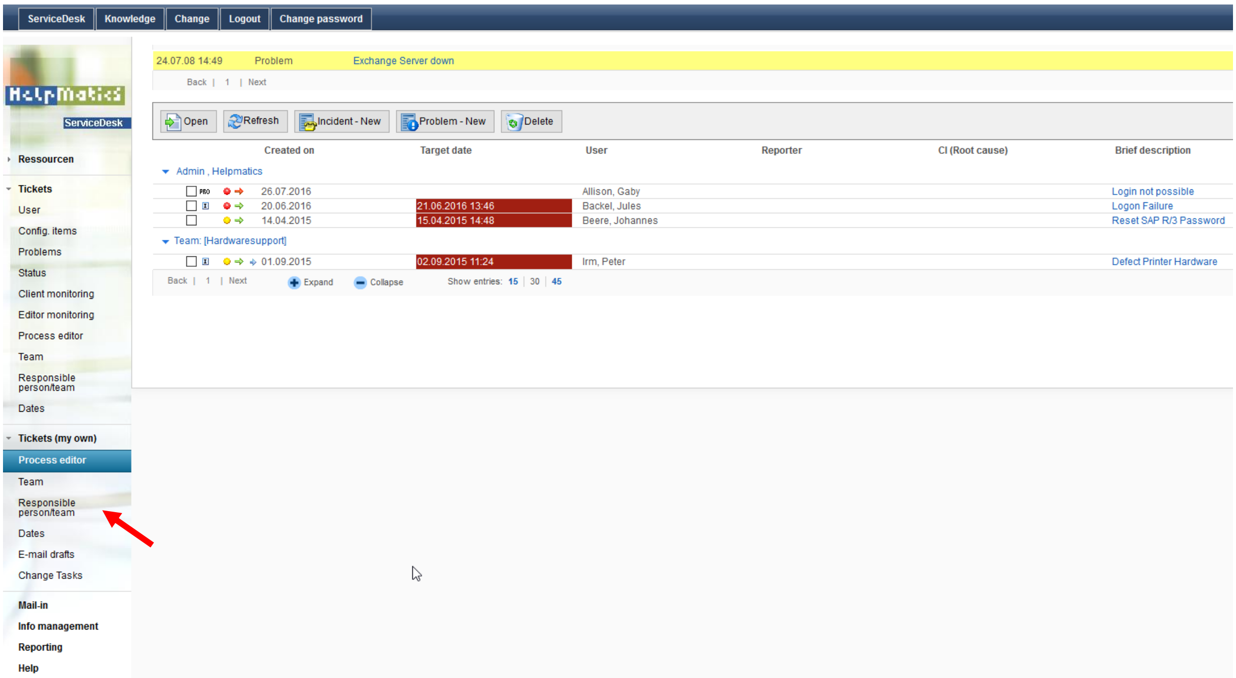


Fig. 17: Tickets (my own) – process editor

This view (Fig. 17) shows all active tickets for which you are entered as the current process editor. See paragraph **2.3**. for an explanation of the icons.

TEAM

All tickets currently assigned to your own process team or to the process editors of this team are displayed here. So you can keep track of tickets processed by colleagues of your own process team(s).

RESPONSIBLE PERSON/TEAM

This view shows all active Tickets for which you are the responsible person.

DATES

This view shows all active Tickets for which a process date has been entered and for which you are the current process editor.

E-MAIL DRAFTS

E-Mails created for tickets can be saved as draft and later be sent. The drafts categorized according to ticket ID are contained in this view. A draft can be edited and sent unless the related ticket has been closed.

CHANGE TASKS

If the HelpMatics™ Change module is available, you can see all tasks assigned to you or to a process team (you are a member of). Only "active" tasks are shown - tasks in draft mode or completed tasks are hidden.

The features available, i.e. Workflow, Status, Time Recording, Mail and Return WF have the same functions as in the Notes client. For further information on these subjects, please refer to the HelpMatics™ Change manual.

The HIDE/SHOW CHANGE DATA button allows you to show or hide change details.

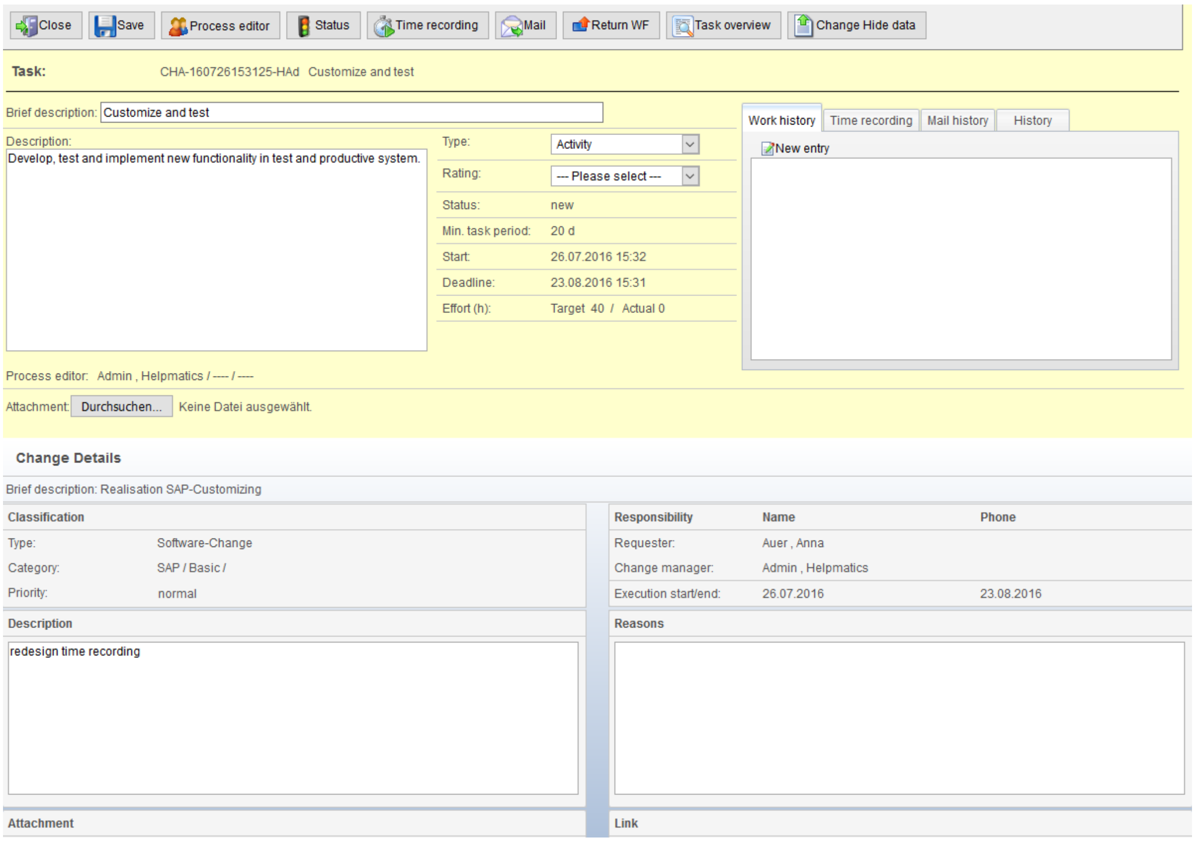


Fig. 18: Screen for task processing and representation of change data in the web

2.8.2 All tickets

User tickets

The TICKETS > USER view displays all tickets arranged according to clients and the users the tickets have been created for. Both, active and closed tickets are displayed.

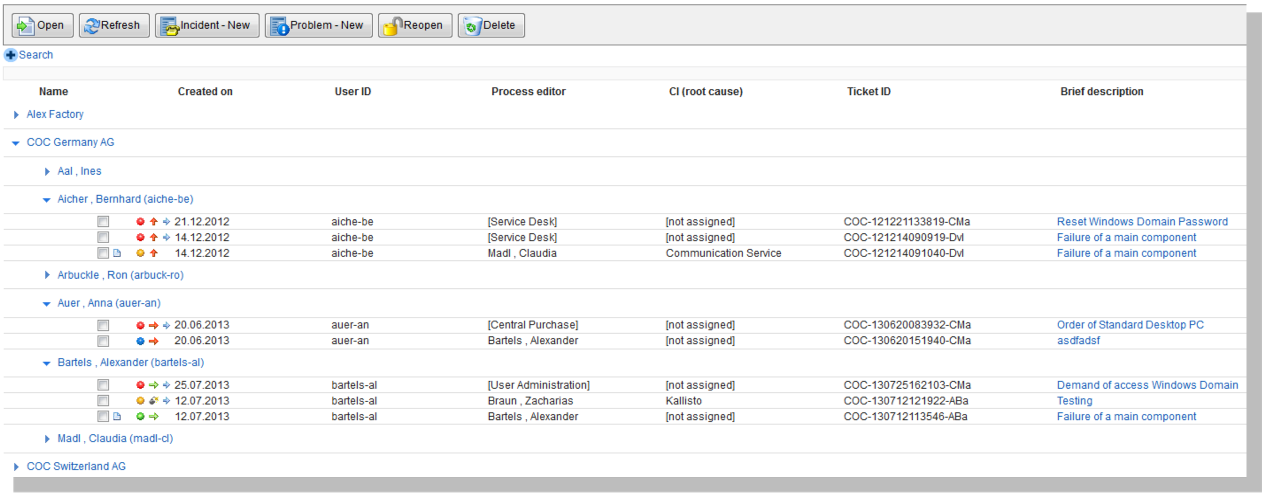


Fig. 19: Tickets per user

Buttons on the action bar:

- To create a new Ticket, select INCIDENT – NEW. The user and configuration item data will be transferred from the ticket that has just been selected.
- A Ticket can be opened and edited by double click or by pressing the OPEN button.

TICKETS > CONFIG.ITEMS

This view shows all CIs supported by the helpdesk so far, sorted by Config. item No. In this view, the action buttons are the same as those in the TICKETS > USER view.

TICKETS > PROBLEMS

This view lists all open tickets of Problem type. Creation date, user's name and important config. item data will also be displayed.

TICKETS > STATUS

All active tickets are displayed there according to their current status.

TICKETS > CLIENT MONITORING

Here you can see all open tickets sorted by their escalation level. In the service level document, three escalation levels can be defined for each client.

TICKETS > PROCESS EDITOR MONITORING

Here you can see all open tickets for which service level monitoring is active (must be activated for the current process editor or process team).
As is the case in client monitoring, 3 escalation levels are displayed (to be defined via the service level document for process editors).

TICKETS > PROCESS EDITOR

This view displays all active, i.e. open Tickets sorted by the process editor in charge.

TICKETS -> TEAM

This view shows the tickets according to the process editor's team membership. If a process editor cannot be assigned to a team, the process editor will be displayed.

TICKETS > RESPONSIBLE PERSON/TEAM

This view displays all active Tickets sorted by the resp. person/team who received the respective request.

TICKETS > DATES

This view shows all active tickets containing a date of response, sorted by the process editor or process team the ticket was received by and by the date of response.

2.9 Mail-In

Apart from using the above mentioned option of sending e-mails to users, you can call the HelpMatics™ Mail-In function by clicking MAIL-IN in the Navigator.

In the corresponding view, the user requests directed to the helpdesk (via a specified e-mail address) by e-mail or via the portal are stored.

Tickets can be created from the e-mails displayed. If the sender of the e-mail is identified as a user, the data will be transferred into the ticket; otherwise an info message will be displayed. The e-mail will be assigned to the ticket.

Answering the e-mail is only possible in the Notes client. The button with its EMPTY RECYCLE BIN sub-menu is available to users with deletion rights and will remove all e-mails from the recycle bin.

2.9.1 Automatic mail processing

With the appropriate configuration, e-mails in MAIL-IN can be attached automatically to tickets. This requires that the ticket ID be entered in the subject. If e-mail assignment has been activated for the client of a ticket, the e-mail will be attached to the ticket, the process editor will be informed and a flag will be set.

2.10 Info management

2.10.1 Functionality

The INFO MANAGEMENT can be used for various purposes. The display of current messages via the info board is only one possible field of application.

Further applications:

- Providing current messages via the info board or via the HelpMatics™ portal (e.g. important information for all support team members, or on failures, changes); pre-scheduling of messages. Select under MEDIUM where the info is to be displayed.
- Documentation of incidents
- Basic change management
- Storage and exchange of documents, processes or other information to be distributed in support
- Connection to the Intranet for messages to the users
- Connection to master tickets (can only be created in the Notes Client).

2.10.2 Info board

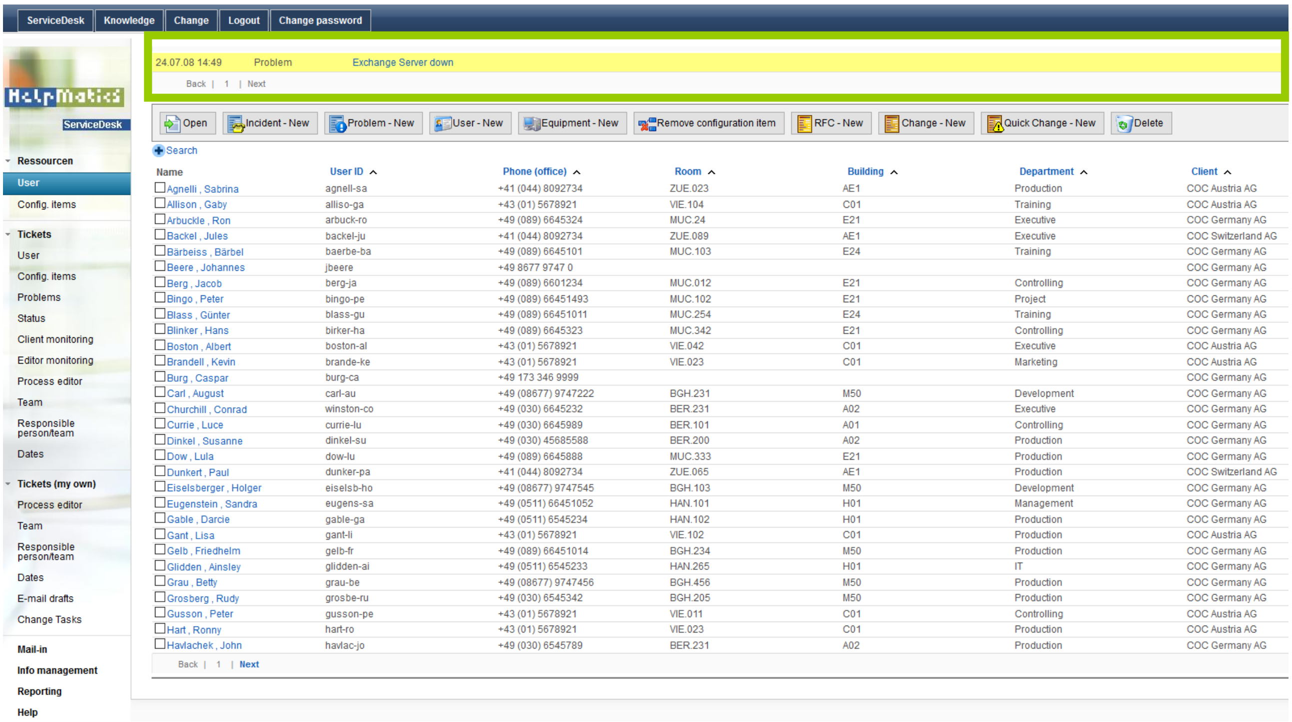


Fig. 20: Info Board

Via the info board, information is displayed quickly and timely. The VALID FROM DATE, the type and the info-text are displayed.

After clicking INFO MANAGEMENT in the navigator, the associated window opens, and, by clicking the INFO - NEW button, you can create new info.

To show information in the info board it is necessary to activate the SHOW IN INFO BOARD option. The entries will be sorted by Priority and start of validity (Valid from / in descending order).

Additionally, info can be released for the portal (SHOW IN PORTAL).

HelpMatics™ divides the stored information and documentation into three categories: Problem, Info and Change. Other categories can be created if necessary.

You can open an entry selected in the view with EDIT or by double-clicking it in order to change it.

ENTERPRISE:

Info documents can be provided with LOCAL or GLOBAL availability.

It is not possible to downgrade the availability from Global to Local.

2.11 Problem Management

If frequently recurring Incidents are recognized as a Problem, a Problem ticket can be created by a Problem manager:

ENTERPRISE:

A process editor with the [_PROBLEMMANAGER] role creates a Problem ticket based on an Incident ticket by using the PROBLEM – NEW button.

The ticket types to be available for Problem tickets can be specified in the ADMINISTRATION (in the Notes Client). The ticket ID of Problem tickets always starts with PRO. In the ticket views, problem tickets are identified by the PRO icon.

In the reporting, problem tickets are displayed in separate reports.

2.12 Reporting

Various reporting schemes are displayed via the Reporting menu, the appropriate rights provided. The schemes provide ticket numbers, e.g. according to category, type, root cause department or forwarding.

3 HelpMatics™ Configuration Management

The CMS tab is available if you use the HelpMatics™ CMS Enterprise module. HelpMatics™ CMS Enterprise offers enhanced features on the basis of a relational database. Please contact the HelpMatics™ product management if you have questions concerning CMS Enterprise.

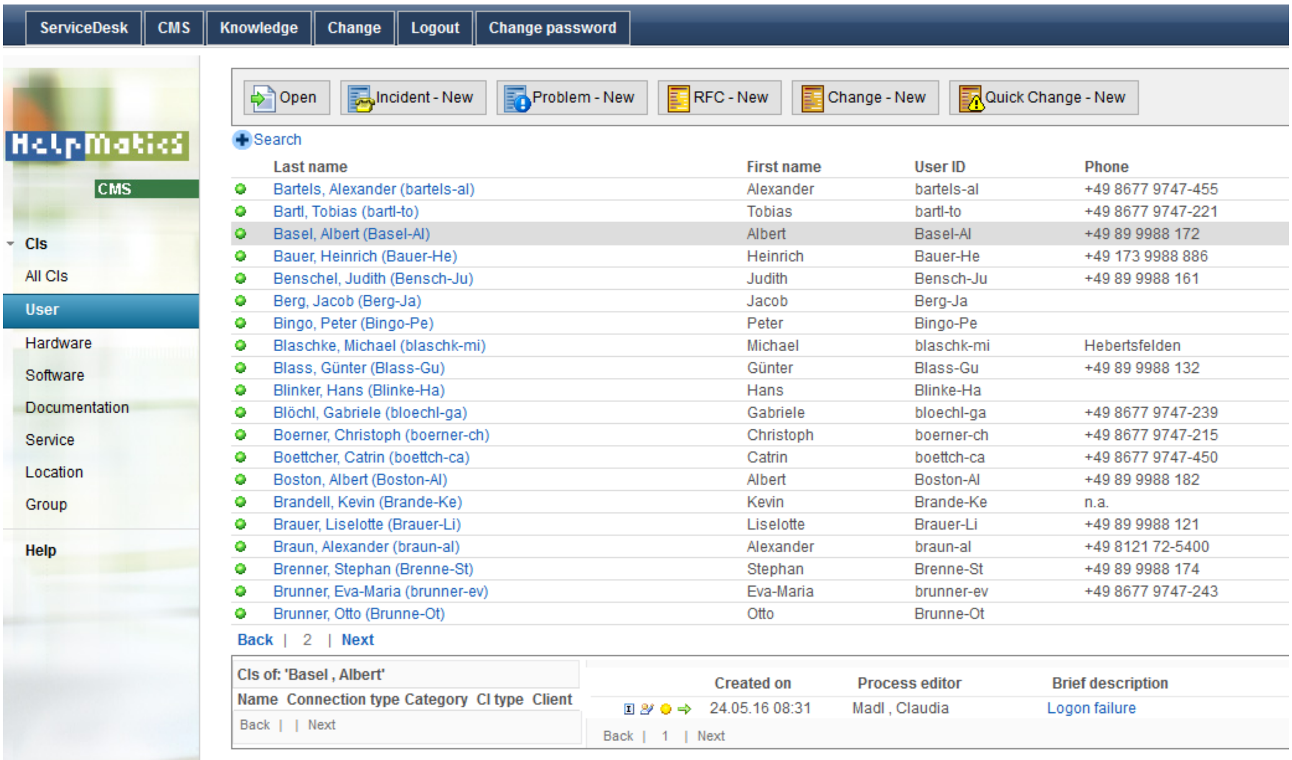


Fig. 21: Overview of user CIs

Various CI types are available in the CMS module:

- User
- Hardware
- Software
- Documentation
- Service
- Site

CIs can be divided into groups. You can open overviews of CIs and groups via the left navigation.

When searching for CI types, the search screen allows you to use different spellings, e.g.: HW, hardware, ha*.

When you select a CI in the overview, further features are available:

- Display of related CIs
- Display of the tickets related to the selected CI
- Creation of incidents, problems or changes on the basis of the CI, the necessary rights provided.

Double-click the selected item or link to open a CI with reading access. The first tab shows the CI-specific information. The CI types HARDWARE and SOFTWARE additionally comprise a CONTRACT / COST tab. In the RELATIONS tab you see all related CIs incl. display of the relation type as well as of the filter options according to category and type.

As regards groups, the members of a group are shown in an additional TEAM tab.

A CI may have the following relations (relation options):

Name	**Description**
GROUP -> MEMBER	Grouping
PARENT -> CHILD	Hierarchical relation
PARENT <-> PARENT	Redundancy; CI can be replaced by related CI, e.g. it can take over the tasks of the other CI
ITEM – ITEM	Loose, unspecific relation

For further information, in particular on configuration and CI import function, refer to the HelpMatics™ CMS Enterprise Documentation.

4 HelpMatics™ Knowledge

You change to the Knowledge Base via the upper bar.

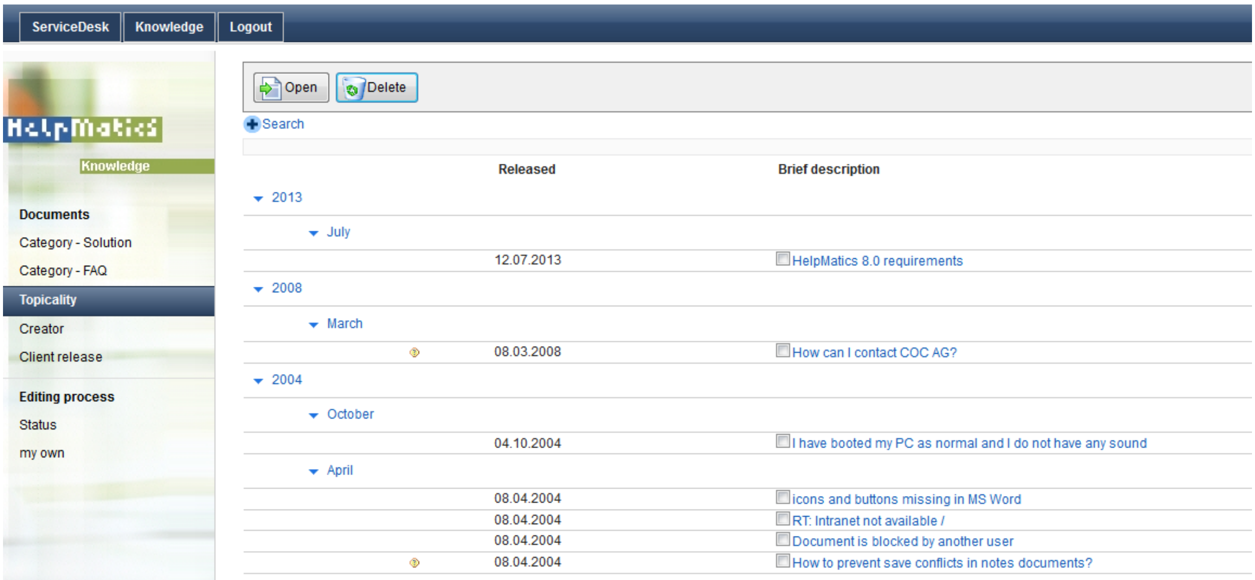


Fig. 22: Navigator and Viewer of the Knowledge Base

The Knowledge Base contains documents stored in the knowledge database after ticket processing.

4.1 Knowledge Navigator

The Navigator allows you to select the desired information, which will then be displayed in the Viewer. Navigation is made by mouse-click.

Under DOCUMENTS various knowledge document views are available.

4.2 Knowledge Viewer

The Viewer is displayed as main window on the right and shows the information selected in the Navigator. Double-clicking a line displays the relevant information in form of a document.
FAQ documents are marked by the icon.
Search is performed according to the same principle as in HelpMatics™ ServiceDesk.

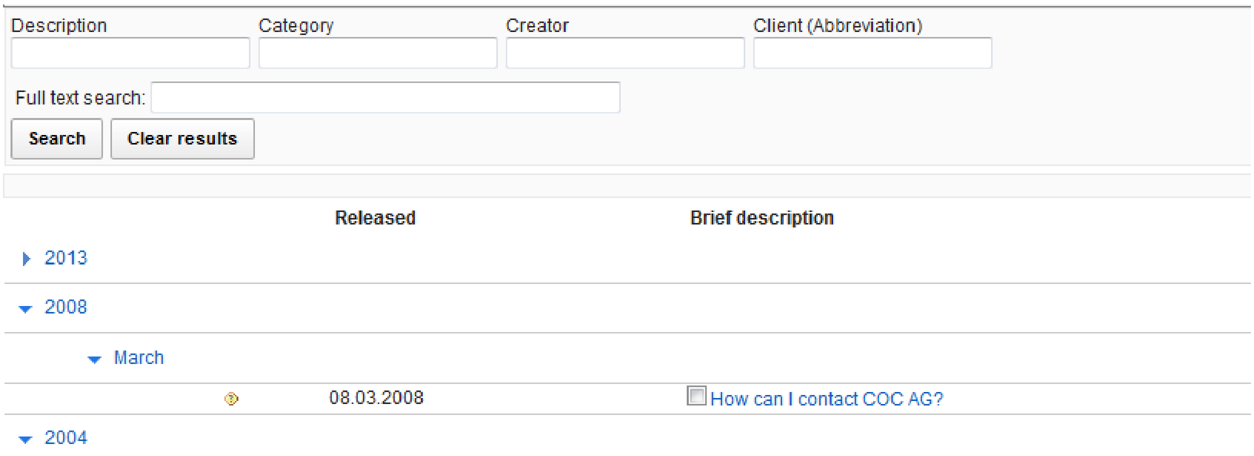


Fig. 23: Documents - Up-to-dateness view

4.3 Icons in the views

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

4.4 Knowledge views

Knowledge documents can be displayed under the DOCUMENTS navigation item in different views:

View	Description
CATEGORY > SOLUTION	Documents offering solutions for user tickets are arranged according to categories
CATEGORY > FAQ	FAQ documents are classified according to categories
UP-TO-DATENESS	Solution and FAQ documents are displayed according to the year and month of their release
CREATOR	Solution and FAQ documents are classified according to their creator. If the document has been transferred from HelpMatics™, the process editor having closed the incident is the creator of the document (only solution documents are transferred from HelpMatics™). For documents that were created directly in the knowledge base, it is the user who created the document. In both cases, the documents may have been processed by experts (see History tab in the document).
CLIENT RELEASE	Classification of solution and FAQ documents according to their client membership

Users with MANAGER or EXPERT role have access to the EDITING area. Here entries (tickets from HelpMatics™ ServiceDesk or new solutions created in the knowledge base and FAQs) are prepared and released for certain user groups (roles).

Depending on the role, the following views are available in the editing area:

View	Description
EDITING STATUS	Here you find all non-released entries (solutions and FAQs), categorized as follows: ▪ NEW Includes marked requests from ServiceDesk (after preparation by an agent) and new solution and FAQ documents. ▪ ASSIGNED - EXPERT These documents have been assigned to an expert or an expert group for editing. This can be done by a manager or by an agent on the basis of the categories entered. ▪ CHECKED - OK Here documents checked by experts and waiting for release by the manager are collected ▪ CHECKED - DENIED Here all entries are collected that were denied or rejected by the expert. The manager can delete them or assign them to another expert.
OWN	Here Experts and Managers can find the documents assigned to them for editing.

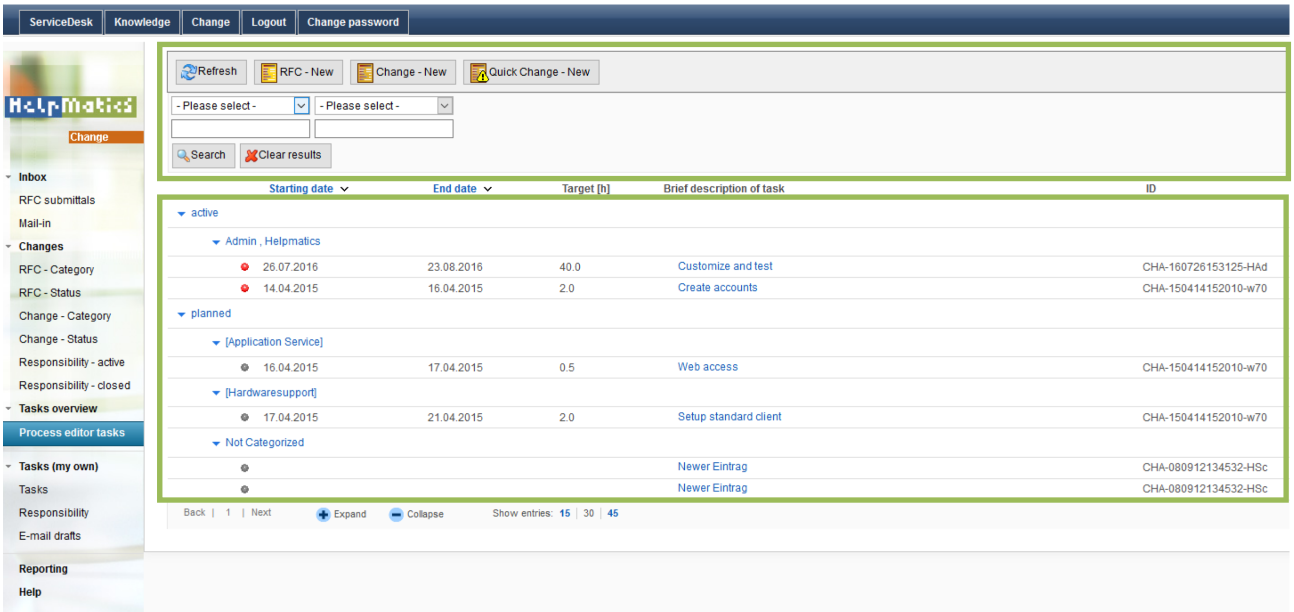
For a complete description of the editorial workflow and the tasks of knowledge managers and experts, refer to the HelpMatics™ ServiceDesk User manual.

5 HelpMatics™ Change

The features described in the following are available when using HelpMatics™ Change. Please contact the HelpMatics™ product management if you have questions concerning Change Management.

For further information on change management and task workflow, please refer to the HelpMatics™ Change Documentation.

5.1 Navigation, overview and search



The navigator is on the left. Select the documents to be shown in the viewer:

- incoming e-mails and requests received via web
- RfCs and Changes, categorized according to category, status, responsibility
- Tasks categorized according to process editor
- own tasks and e-mail drafts

The action bar, search and information are in the viewer. Each view offers various actions for recording and editing information and requests. Action bar and search are always to be found at the same place.
Below the Viewer, you will find the page shift buttons Back | 2 | Next
as well as the number of documents displayed per page Show entries: 15 | 30 | 45

The search principle is the same in all views. Only the search fields differ in the individual views.
You'll find the search below the action bar. Open the search via Search and close it via . Use the drop-down box to search for contents in the fields, e.g. in the Description field. You can use * as a placeholder.
For full text search, you can enter either search terms or Notes search commands, e.g. FIELD REQUESTERFULLNAME CONTAINS MADL , CLAUDIA. The CLEAR RESULTS button resets the search results.

5.2 Icons in the views

Icons play an important role in the HelpMatics™ Change views since they concisely display information.

When you hover over an icon a brief explanation appears. The following tables explain the icons used as well as their meaning.

5.2.1 Priority icon

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

The text is defined in the administration area.

5.2.2 Status icon

Status	Color	RFC	Change	Task
	red			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; triggers the interruption of a workflow

5.3 Creation and processing of an RFC and change

The appropriate authorization provided, RfCs, changes or quick changes can be created and processed.

Use a template to create a new RFC, change or quick change. CLICK RFC / CHANGE / QUICK CHANGE – NEW to open the template drop-down list. After the selection of a template a second window will open to select the optional tasks, if applicable.

A newly created RFC or Change first has DRAFT status. When you change to Status NEW or PROCESSING ACTIVE mandatory fields will be checked and a mail notification be sent (if configured). The task workflow is started.

For detailed information on termination of status, mail notifications, standard changes, carrier ticket features as well as time and expenditure calculations, please refer to the ‚HelpMatics™ Change Documentation.

5.4 Task processing

The features available, i.e. WORKFLOW, STATUS, TIME RECORDING, MAIL AND RETURN WF have the same functions as in the Notes client. For further information on these subjects, please refer to the HelpMatics™ Change manual.

The Hide/show change data button allows you to show or hide change details.

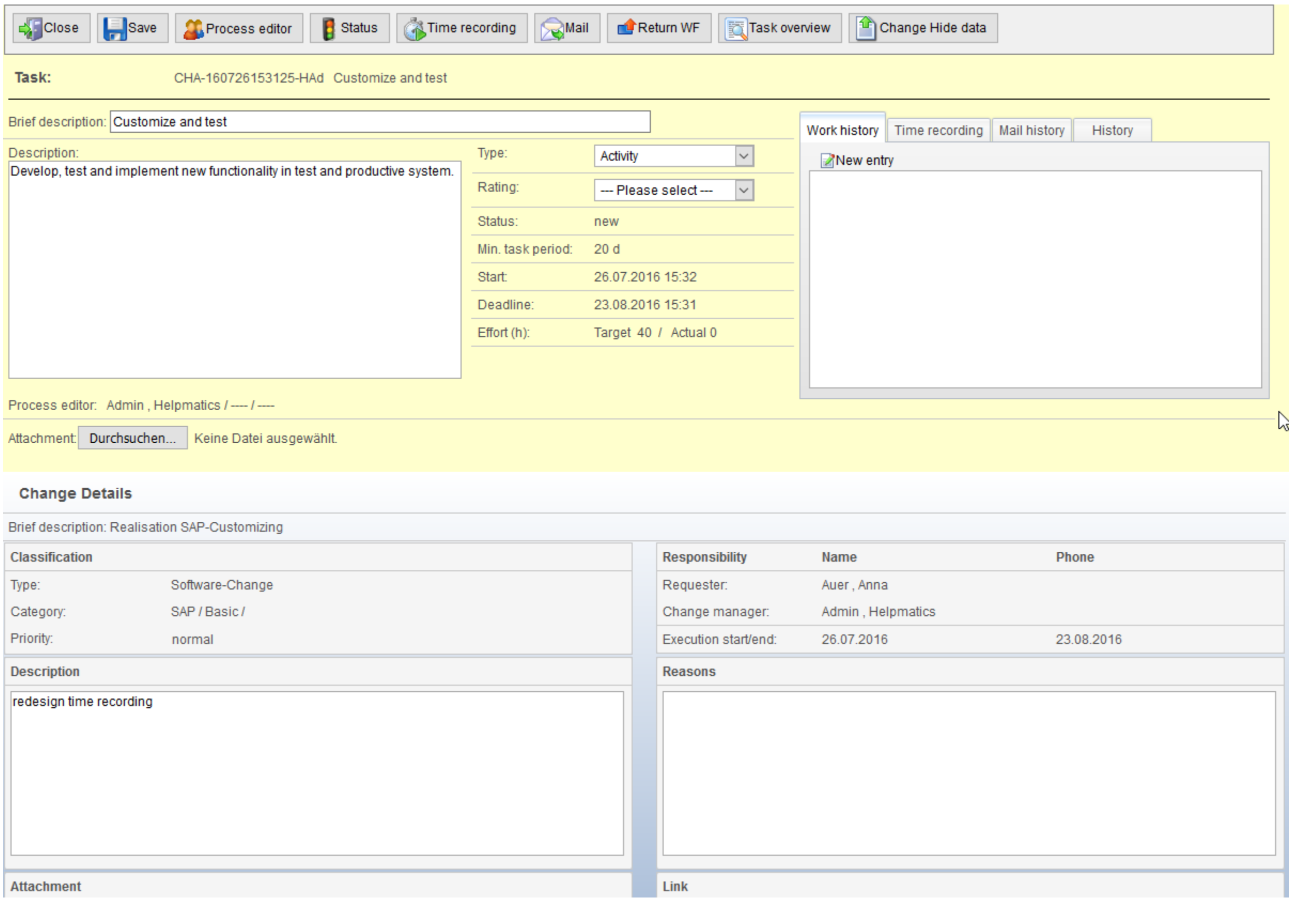


Fig. 24: Screen for task processing and representation of change data in the web

5.5 Reporting

Various reporting schemes are displayed via the Reporting menu, the appropriate rights provided. The schemes provide figures as to RFCs or changes, according to category, expenditure or template.

6 Imprint

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