# Helpdesk

Support management

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# Contents

# 1 Introduction

Record and process requests quickly and efficiently with Helpdesk for CAS genesisWorld. Whether a customer establishes contact by phone, by e-mail or via the integrated web client is immaterial. All requests are recorded quickly and consistently. Ticket pools and ticket delegation are supported as well as an automated internal and external notification.

The support portal Helpdesk online not only enables activated users to submit requests online but also provides them with a status overview for entered requests at any time. In addition, a public FAQ search is available here which can also be used for file downloads. You can control the contents comfortably and transparently via CAS genesisWorld.

Service agreements determine your customers' entitlement to benefits as well as the coverage of your service costs. With Helpdesk's contract management, you document the product uses and individual agreements you have made with your customers including service levels, response times and contact persons.

Time recording for all services and associated reports per customer, project and ticket guarantee a complete overview of your service management costs.

## 1.1 Feature overview

- The **Desktop Client** offers the full range of features.
  - Ticket management in CAS genesisWorld
  - FAQ management and powerful search in tickets and FAQ documents
  - Process management and communication via actions, e-mail templates, as well as internal and external automatic notfication
  - Product use and service agreement management with maintenance billing (actual invoicing additionally requires the Easy Invoice module)
  - Block support entitlement in all clients for companies and single contacts
  - Time recording in the background or afterwards and versatile analysis
- Registered partners and customers may access the **Helpdesk online** portal.
  - Support portal with overview of all requests, online submittal and FAQ search
  - Distinction of internal and published FAQ documents for customers' online access
- Users with sufficient rights can also access most features in the **Web Client**.
  - Service agreements, product uses, tickets and time records

  Additionally, the **Team planning** app, **Timeline view** and **Board view** are available for visual planning in the Web Client.

  The descriptions herein refer to the Desktop Client unless indicated otherwise.

## 1.2 Specifics with modules and integrations

When using Helpdesk, you have to consider certain specific characteristics in combination with other modules and integrations.

The most important features and limitations are described where they apply in this user guide, especially specifics when using CAS genesisWorld Web.

For an overview, see the Helpdesk page under **Working with several modules** in the English version of hilfe.cas.de.

# 2 Ticket management

The following sections describe the default features for tickets in the Desktop (2.1 to 2.6) and Web Clients (2.7).



Helpdesk online is described in chapter "10 Helpdesk online" on page 126.

## 2.1 Views and features for tickets

Tickets are jobs of certain types. The associated fields and features will be displayed in the job's data record window when a ticket type is selected.

The following standard features are available for tickets.

- **Data record window** for jobs; the **General** tab is replaced by the **Ticket** tab. When a job's type is changed so it becomes a ticket or isn't a ticket anymore, field contents that have already been provided are retained.
  - **Type** for marking as ticket
  - **Status** for the support process
  - **Primary links** to address, project and job, displayed in the tree view (with ticket icon) and in analyses
  - **General links** to any other data records
- **Creation** with ticket type via the toolbars of the data record windows and list views for addresses, phone calls, e-mails and projects
- **Global search** in all fields such as **Subject**, **Customer** and **Submitter**, configurable via **Settings** > **Search**; separate **FAQ search** for FAQ documents and tickets
- **Views** in the program navigator (list, dossier, tree) and in the link navigator (link list)

## 2.2 Creating tickets

You can create tickets for addresses, phone calls, e-mails and projects.

Settings referred to here can be found in the **Helpdesk** area of the Management Console.

**Create new ticket:** By clicking this button in the toolbar of a data record window or a list you create a ticket for the selected data record.

- **Tickets for customers:** For every ticket you create for an address, phone call or e-mail, the address for which it was created or the primary address of the associated phone call or e-mail will be entered as **Submitter**.

  The **Customer** link will initially be set to the associated company (alternatively, the submitter may also be entered as customer, see **Allow tickets and service contracts for contact persons; adopt submitter as customer in ticket** on top of page 151).

  The submitter's company will also be entered as the new ticket's primary address. Its primary project is set to a support project which will be created to this end if it doesn't already exist. This project serves as a tree view container for all tickets submitted by the same company.

  If required, you may change the **Customer** as **Submitter** links in the ticket.

  - **Tickets for phone calls:** A ticket created for a phone call will inherit the phone call's subject in its **Subject** and **Request** fields. The phone call's notes will be entered in the **Internal notes** or **Notes** field, depending on your settings (see top of page 150).

    A primary link will be created between the phone call and the associated ticket. This way, the phone call will be displayed in the ticket's tree view and vice versa.

  - **Tickets for e-mails:** A ticket created for an e-mail will inherit the e-mail's subject in its **Subject** field. The e-mail body will be entered in the **Internal notes** or **Notes** field, depending on your settings. For e-mails, you can also choose to enter the subject or body in the ticket’s **Request** field (see top of page 150).

    A primary link will be created between the e-mail and the associated ticket. This way, the e-mail will be displayed in the ticket's tree view and vice versa.

    As the sender of an e-mail isn't always known, you may admit tickets for e-mails without a primary address. In this case, the submitter, customer and primary links stay blank (see **Submitter link to ticket must exist** in the middle of page 150).

- **Tickets for projects:** A ticket created for a project will adopt the project's **Subject** as **Subject** and **Request**.

  The project will be entered as the ticket's primary project. This way, the ticket will also inherit the project's primary address and will therefore be displayed in the tree views of both the project and its primary address.

  The project's primary address will initially also be entered as the ticket's **Submitter**.

  The associated company will initially be entered as the ticket's **Customer**.

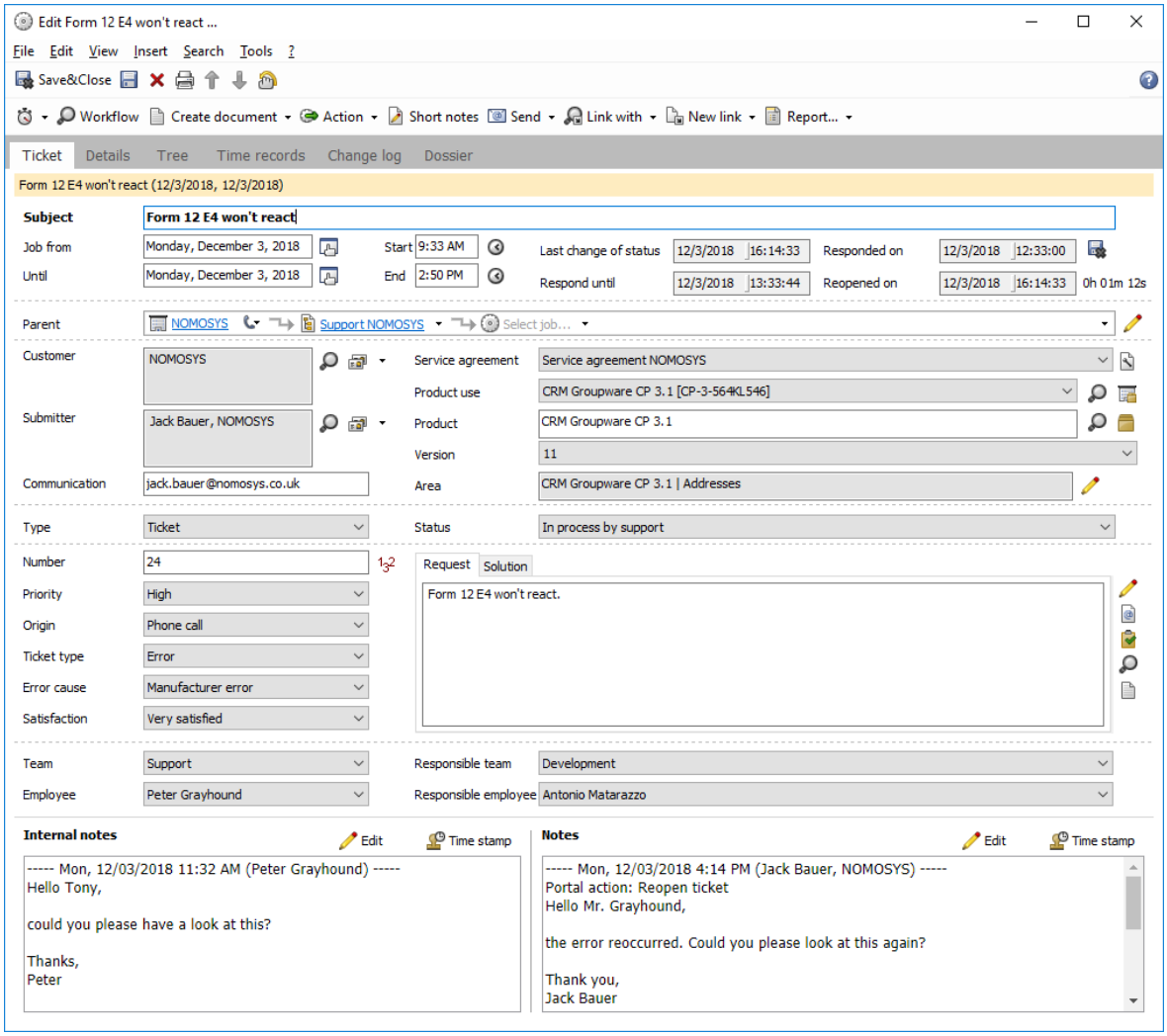
## 2.3 The data record window for tickets

The following sections describe the fields and features for recording tickets in the **Ticket** and **Details** tabs of the data record window for jobs.

### 2.3.1 Ticket

You can disable features you don't use in the Management Console under **Helpdesk** > **General** (see page 152).

By default, the **Use automatic time recording for tickets** and **Display service agreement** features are turned off.




- **Subject:** Tickets created manually for projects, phone calls or e-mails will adopt the subject of the project, phone call or e-mail as **Subject** and as **Request**.

  Tickets created automatically for inbound e-mails sent to the support account also adopt the e-mail's subject in the **Subject** and **Request** fields (see "12.6 Setting up a support e-mail account" on page 218).

In tickets created manually for addresses, the **Subject** and **Request** fields are initially empty. As long as the **Subject** field is empty, your input in the **Request** field will automatically be entered as **Subject** as well.

Submitters creating tickets via Helpdesk online will be prompted for a **Subject** in addition to the actual **Request**. Both fields are mandatory in Helpdesk online.

- **Duration:** For tickets created during hotline hours (according to the settings for the selected priority and service agreement or default settings when no service agreement applies), the current time will be entered as start and end. The same applies when you are not using service agreements.

  For tickets created outside of hotline hours, the start and end will be shifted to the next applicable hotline hours segment (e.g., a ticket created on Friday at 7 pm in Helpdesk online will start at 8 am the following Monday if that is the next start of hotline hours).

  When you save a ticket with a completion status, the end will be set to the current time. If this leads to the end being before the start, the end will be set to equal the start when saving the ticket.

- **Last change of status:** Here you see the most recent change of status.

  With the Helpdesk module, whenever a ticket or another job is created as well as when one of the **Status**, **Priority**, **Employee**, **Team**, **Responsible employee** or **Responsible team** fields is changed in a ticket or another job, an individual data record of the **Status change** type will be created and linked to the associated ticket or job.

  With the Report module, you can analyze status changes in the context of the associated jobs or separately.

  - **Start:** time of the ticket's creation or the last change of status
  - **End:** time of the change of status
  - **Status start / end:** status before and after the change
  - **Priority start / end:** priority before and after the change
  - **Employee, team, responsible employee, responsible team start / end:** participants and groups before and after the change
  - **Duration (calendar days):** days between start and end
  - **Duration (service hours):** support availability during the total duration in hours. Only hotline hours according to the service agreement are considered. For tickets without a service agreement, the default settings are used (see "11.2.4 Service agreements" on page 174).

## Note

Please note that users with a Helpdesk license or another license that unlocks Helpdesk features (e.g., IT Services) need at least the **Insert** right for the **Status changes** data record type in addition to the required job rights in order to save jobs.

- **Respond until:** Here you see the response deadline for the ticket. It will be set according to the ticket's **Priority**. Before the ticket has been responded to (as long as the **Responded on** field is empty), when you select a priority level, the associated response deadline will be calculated using the following data.
  - Response time and hotline schedule by priority.
  - Country and federal state of which public holidays should be considered.

  These data are taken from the selected service agreement.

  If no service agreement is selected, the response deadline will be derived from the settings for tickets without a service agreement in the Management Console (**Helpdesk** > **Service agreements**).

  This is also the case if submission permissions have been entered for a service agreement and the ticket's submitter has not been entered as a contact person in the service agreement.

  The response deadline will be shifted by one calendar day for each day entered in the response time. Calendar days without hotline hours will be skipped.

  - For example, hotline hours have been entered from Monday to Friday. A ticket is submitted on Friday. The response time entered in the service agreement for the ticket's priority spans 3 days. This results in a response deadline of next Wednesday, as Saturday and Sunday are skipped.

  Hours and minutes specified in the response time shift the response deadline by the same number of hours and minutes within the hotline hours. Any hours and minutes outside the hotline hours are skipped.

  - For example, hotline hours have been entered from Monday to Friday, 12:00 to 16:00 respectively. A ticket is submitted on Monday at 11:00. The entered response time spans 8 hours. The hour from 11:00 to 12:00 is not counted since it is outside the hotline hours. The response deadline will thus coincide with the end of the second day with hotline hours after the request's start (Tuesday, 16:00).

  When no settings apply to the ticket's priority (e.g., when no response deadlines or hotline schedule have been entered in the service agreement or default setttings), the ticket's start (i.e., the date and time of its creation) will be entered here.

  - **Activate:** This feature is not available by default. To activate it, select **Display service agreement** and **Response deadline from service agreement** under **Helpdesk** > **General** in the Management Console.

- **Responded on:** Here you see the time at which a support employee first opened the ticket and changed the status. The field will be filled in when the ticket is saved if it was previously empty and the ticket's status has changed. It will also be automatically set in new tickets when they are created with an entry in the **Status** field.

  Once the field has been entered, the response deadline can no longer change.

In the Management Console, under **Helpdesk** > **General**, you select status options whose assignment to a new or existing ticket will not cause the **Responded on** field to be set, even if it is empty (see page 149).

Select here all status options with which tickets are created via Helpdesk online or the support e-mail account. This way, you make sure the **Responded on** field is only set when a support employee changes the status in CAS genesisWorld.

- **Reopened on:** Here you see when the ticket was last reopened.

  This field will be set whenever the status of a ticket changes from a completed status to a status that doesn't mark completion (you select status options which mark the completion of a ticket in the Management Console under **Helpdesk** > **General**.)

- **In process for:** Here you see the processing time for the ticket since its data record window was opened.

  **Save, close and record time:** Here you save the ticket, close the data record window and create a time record for the time spent processing the request.

  Each user may set the time record window to open when he saves and closes a ticket and records time for it using this feature (**Settings** > **Modules and Solutions** > **Open time record for tickets**).

  - **Activate:** This feature is not available by default. To activate it, select **Use automatic time recording for tickets** under **Helpdesk** > **General** in the Management Console.

- **Links and communication**

  - **Parent:** When you create a ticket by clicking on the **Create new ticket** button, the primary address and primary project will be entered automatically (see "2.2 Creating tickets" on page 10.)

  **Customer:** Here you enter the affected company.

  **Search address:** Here you select the customer in the **Search** window. Switching customers will reset the service agreement and product use selections. A selected product and area will be retained.

  **Open address:** Here you open the entered address.

  - **Get in touch:** Here you call the customer or write an e-mail.

  - **Contact person as customer:** In the default setting, only companies and individual contacts may be entered as customers. In the Management Console, you may specify whether contact persons may also be entered (see "Customer and submitter" on page 150.)

  **Submitter:** Here you specify the person who has submitted the request.

  **Search address:** Here you select the submitter in the **Search** window.

  **Open address:** Here you open the entered address.

- **Get in touch:** Here you call the submitter or write an e-mail.
- **Sales partner as submitter:** If you are the manufacturer of a product and get requests from sales partners, specify the final customer in the **Customer** field.

- **Communication:** For tickets created without a submitter for inbound e-mails sent to the support account (see "12.6 Setting up a support e-mail account" on page 218), the e-mail address will be stored in the **Communication** field. When you enter a submitter in any ticket, his e-mail address will be entered in the **Communication** field as well, if that field is empty. You may select the e-mail address to use here in the Management Console, under **Helpdesk** > **General** (see "**Use the following e-mail address of the submitter as communication address**" on page 150).

  If the **Communication** field isn't empty and you enter a submitter with no e-mail address or with a different e-mail address in the associated e-mail field, you will be asked whether that e-mail address should be entered in the **Communication** field of the ticket or whether the e-mail address already entered in that field should be transferred to the associated e-mail field of the new submitter. You may deactivate this message, such that your selection will automatically be applied the next time you select a submitter (e.g., enter the e-mail address of the new submitter in the ticket's **Communication** field). You may activate the message again in the Settings under **General** > **Deactivated messages**.

  Changing the submitter in Helpdesk online will automatically overwrite the communication e-mail address with that of the new submitter.

- **Service agreement:** Depending on your settings, all of the customer's or the submitter's service agreements will be available for selection here. Via the **Use service agreement of customer/submitter for different customer** setting under **Helpdesk** > **General** in the Management Console, you determine whether the customer's or the submitter's service agreements will be available if both differ.

  - You may enter a service agreement filter in the Management Console in the **Helpdesk** area under **General** in order to limit the selection (e.g., to exclude expired service agreements).
  - If exactly one service agreement is available for selection, it will be selected automatically if the **Select service agreement automatically** option is active under **Helpdesk** > **General** in the Management Console.
  - When a service agreement of the customer is selected, only product uses entered for that service agreement will be available in the ticket.
  - If the **Response deadline from service agreement** option is selected under **Helpdesk** > **General** in the Management Console, the selection of available priority levels will be limited by the service agreement. In this case, the selection will also be limited for tickets without a service agreement by the settings for tickets without a service agreement. Additionally, the selection may be limited by submission permissions (see "**Priority**" on page 18).

**Open service agreement:** Here you open the selected service agreement.

- **Activate:** This feature is not available by default. To activate it, select **Display service agreement** under **Helpdesk** > **General** in the Management Console.

**Product use:** Initially, all of the customer's active product uses are available here (see "Start and end of maintenance" on page 58).

When a service agreement of the customer is selected, only product uses entered for that service agreement will be available in the ticket.

With the **Display serial number for product use** setting under **General** in the **Helpdesk** area of the Management Console, you determine whether serial numbers of product uses, if available, will be displayed in the selection next to product names.

In this case, the serial number will also be displayed in the **Product use** field once a product use has been selected and will be stored in this field when saving the ticket.

When selecting a product use, the product and version will be entered automatically.

When using the customer's service agreement (see "**Service agreement**" on page 15) and there is a valid service agreement belonging to the selected product use, it will also be selected automatically.

**Select related product use:** Here you select a product use in the **Search** window. Only active product uses for the selected customer will be available.

**Open linked product use:** Here you open the selected product use.

**Product:** Here you select the affected product.

- **Quick search:** Enter all or a part of the subject or number of the product you are looking for in the **Product** field. Use the "%" character as a placeholder. It will automatically be added at the end of you search term. For example, you can look for a product whose number contains the digits "001" using the search term "%001". Confirm with the `[Return]` key.

  If your search term can be associated with exactly one product, that product will be entered automatically. If multiple products were found for the entered search term, you will be prompted to select the desired product.

**Select related product:** Here you select a product in the Search window.

**Open linked product:** Here you open the selected product.

## Note

Only products matching the associated filter will be found. By default, these are all products for which the **Active** option has been selected in the **General** tab. You can change the associated filter condition in the Management Console under **Miscellaneous** > **Products** (see "11.3.6 Products" on page 186).

- **Version:** All versions entered for the selected product are available here.
  - **Qualified for support:** If a version is marked as **Not qualified for support**, this will be displayed here (see "5.1.2 Version" on page 52.)

**Area:** Here you select the affected feature area.

You may enter areas and sub-areas in the Management Console, in the **Database** area, as input help items for the **Area** field of products (see "11.1 Settings in the Database area" on page 147). In the **General** tab of a product, you may assign an area to that product (see "5.1.1 General" on page 50).

If you enter a feature area assigned to a product in a ticket, that product will also be entered automatically, and vice versa, if the target field was previously empty.

- **Type and Status:** In the Management Console, under **Helpdesk** > **General** and under **Helpdesk** > **Helpdesk online**, you enter settings for the type and status of tickets.
  - **Type:** You may use different types for tickets. When you create a ticket using the **Create new ticket** button, the default type for tickets will be selected.

    You may select different types for tickets created in Helpdesk online.
  - **Status:** The status indicates the ticket's current process stage. The following status options are available by default.
    - **Open:** New tickets are considered open until they are taken note of.

      Use this status for new tickets created by partners or customers in Helpdesk online and for tickets created for inbound e-mails sent to the support account.

      By default, this is the only status that will not set the ticket's **Responded on** field (see pages 13 and 149).
    - **Accepted:** New tickets you create in CAS genesisWorld are created with this status. It indicates that an employee has accepted the request.

      Tickets that are created by customers in Helpdesk online or via the support account are only considered as accepted after this status has been entered by an employee, indicating that the ticket has been reviewed.
    - **Completed:** This status indicates that the request has been solved.

      Setting this status will set the ticket's **End** to the current date and time.

      Setting another status after this will set the ticket's **Reopened on** field to the current date and time.

  Which options are available is determined via the input help for the **Status** field of jobs, which you can edit in the **Database** area of the Management Console (see "11.1 Settings in the Database area" on page 147).

  Also in the Management Console, under **Helpdesk** > **General**, you select status options indicating that a ticket has been accepted or completed (see "11.2.1 General" on page 148).

If you are using Helpdesk online, also make sure that the correct status options have been entered for request presettings and for list filters in the Management Console under **Helpdesk** > **Helpdesk online** (see "11.2.2 Helpdesk online" on page 154.)

1 3 2 **Number:** When a ticket is created, the next free number will be generated and entered.

- When e-mails are archived with a ticket, the number will be used to automatically assign the e-mail to the associated ticket.

- **Classification**
  - **Priority:** Here you assign a priority level to the ticket.
    - You may specify available priority levels via the input help for the jobs' **Priority** field in the Management Console's **Database** area.
    - If the **Display service agreement** and **Response deadline from service agreement** options have been selected in the Management Console under **Helpdesk** > **General**, the selection of available priority levels will be limited by the associated service agreement. In this case, only priority levels which have been cleared in the selected service agreement will be available for selection. When no service agreement is selected, all priority levels that you have cleared for tickets without a service agreement under **Helpdesk** > **Service agreements** in the Management Console will be available for selection.
    - If submission permissions are also used and have been entered in the selected service agreement, only priority levels permitted for the entered submitter in the service agreement will be available for selection.
    - You may determine the priority for new tickets in the Management Console under **Helpdesk** > **General**. This presetting will only be adopted if it is included in the selection of available priority levels.
  - **Origin:** Here you see which medium was used to submit the request. The **E-Mail**, **Personal**, **Phone call**, and **Web** options are available by default.
    - **E-Mail:** preselection in tickets for e-mails
    - **Personal:** not selected automatically
    - **Phone call:** preselection in tickets for addresses and phone calls
    - **Web:** automatic selection in tickets created in Helpdesk online
  - **Ticket type:** Here you classify the request for support. The **Question**, **Error** and **Improvement** options are available as input help items by default.

    You may enter the preselection for this field in the Management Console under **Helpdesk** > **General**.
  - **Error cause:** Here you record the error after completion of a ticket concerning an error. This field is only available for **Ticket type** values selected as error ticket types

in the **Helpdesk** area of the Management Console under **General**. By default, only **Error** is selected here. If required, you may add other ticket types for errors.

When the **Error cause** field is enabled for the selected ticket type, the **Product error**, **Application error** and **Consultation error** options are available by default.

For **Ticket type** values for which the **Error cause** field isn't enabled, the **Ticket type** value (e.g., **Question**) is repeated in the **Error cause** field.

- **Satisfaction:** Here you specify the submitter's level of satisfaction with the processing of a ticket once it is completed. The **Friendly**, **Neutral** and **Unfriendly** options are available as input help items by default.

  You can edit the available options via the input help for the **Satisfaction** job field in the **Database** area of the Management Console.

  If you are using Helpdesk online, you can set up an automatic request for feedback in order to query the submitter of a ticket about his satisfaction once the ticket is completed (see "12.4 Setting up a request for feedback" on page 209.)

- **Request:** Here you specify the customer's original request.

  When you create tickets for projects, phone calls and e-mails, the respective subject will automatically be transferred to the ticket's **Subject** and **Request** fields.

  This also applies to tickets created automatically for inbound e-mails sent to the support account (see "12.6 Setting up a support e-mail account" on page 218).

  In tickets created for addresses, the **Subject** and **Request** fields are initially empty. As long as the **Subject** field is empty, your input in the **Request** field will automatically be entered as **Subject** as well.

  For tickets created via Helpdesk online, both the **Subject** and the actual **Request** are separate fields, and are both mandatory there.

  **Edit request:** Here you open the description in a separate window.

  **Send e-mail:** Here you send an e-mail to the ticket's submitter or the affected product's manufacturer, selecting from e-mail templates created for tickets (see "4 Using e-mail templates" on page 47.)

  **Create task:** Here you create a task for the ticket. In the Management Console, under **Helpdesk** > **Tasks for tickets**, you specify the type and status of new tasks per ticket type. You also specify there whether tasks should be assigned to the associated ticket via a primary link.

**FAQ search:** Here you open the FAQ search (see "3.1 FAQ search and creating FAQ documents" on page 41.)

- **Solution:** Here you record the request's solution.

  **Edit solution:** Here you open the description in a separate window.

**Save request and solutions as FAQ:** Here you create an FAQ document for the ticket (see "3.3 Creating an FAQ document" on page 44.)

- **Participants and groups:** Instead of the **Participants** field, which you will usually find in CAS genesisWorld, tickets display four drop-down menus.

  You can use these to assign each ticket to a support **Team**, a support **Employee**, a **Responsible team** and a **Responsible employee**.

  After selecting the respective **Team**, all members of the selected group will be available for selection as **Employee**.

  You select groups which will be available for selection as teams for each of both team fields respectively in the Management Console. For members of the groups you have selected for the **Team** field, you can also enter a preselection for that field. In new tickets, the selected group will then automatically be entered in the **Team** field and the user will be entered in the **Employee** field (see "11.2.6 Groups" on page 177).

  To enter users and groups or access their tickets, a user also needs at least reading access to their jobs via group membership or external access:

  - If a user is a member of a group, the assigned access level for jobs applies to the group and all of its members.
  - If a user has external access to a group, the assigned access level for jobs applies to the group and all of its members.
  - Additionally, you may grant users external access rights to jobs of select users.

  The selected groups and users are participants of the ticket and will not only be entered in the associated text fields but also the **Participants** field when the ticket is saved. If all four fields are left blank, the user who has created the ticket will be entered as participant. Please note that any users and groups already entered as participants will overwritten when saving the ticket.

  - **Participants of online tickets:** For tickets created via Helpdesk online, you may enter preselections for all four participant fields in a request type's definition (see "Requests" on page 156). Request types for which all four fields are left blank will be created as public.

- **Internal notes:** An additional notes field for internal notes is available in tickets. You can toggle its display in the Management Console under **Helpdesk** > **General**.

- **Notes:** A ticket's **Notes** field is used for any comments on status changes and for communicating with the customer.

  - When a ticket is created for a phone call or e-mail, either manually or automatically via the support account (see "12.6 Setting up a support e-mail account" on page 218), the phone call notes or e-mail body will be written in the ticket's **Notes** field.
  - In the default setting, when you save a ticket after entering anything in the **Notes** field, you will be prompted to state whether the submitter should be notified. If notification has been set up in the intended default configuration and you answer to

the affirmative, the submitter will receive a status report including the notes (see "12.3 Notifying the submitter about changes in a ticket" on page 205).

- In Helpdesk online, notes for a ticket will be displayed in the detail view. Comments that portal users enter for a ticket will also be written into the notes.

- **Automatic notification of the submitter:** When you save a new ticket or when you save a ticket after changing the **Notes** or **Solution** field, you will be asked whether the submitter should be informed. If you confirm and the **E-mail (business)** address has been entered for the submitter, the ticket will be marked for notification.
  - **Setting up the notification:** Notification of the submitter will be taken care of by the notification and action service if suitable rules have been entered (see "12 Notification and support account" on page 195).
  - **Turning off the prompts for notification:** You may disable the prompts in the Management Console under **Helpdesk** > **General**. You may find the associated settings to the lower right, under **Miscellaneous** (see page 151).

    If the prompt about new tickets is turned off, new tickets will not be marked for notification.

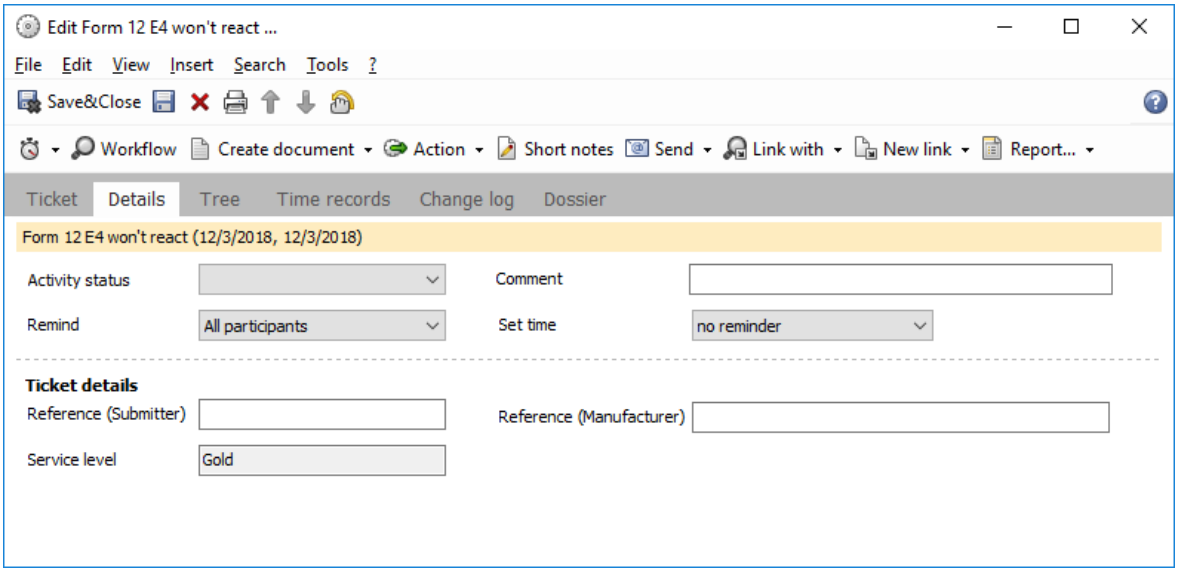
    If the prompt about changes is turned off, tickets will be marked for notification whenever the notes or solution change.

## Note

You can notify the submitter and apply changes to the ticket at the same time via ticket actions (see "2.4 Ticket actions" on page 23). If one of the **Notes** or **Solution** fields is changed by a ticket action, the ticket will not be marked for automatic notification.

### 2.3.2 Details

In the **Details** tab of the data record window for jobs, additional ticket fields are available under **Ticket details**.




- **Reference (Submitter):** If partners forward tickets to you, you may record the ticket number in the submitter's system here.
- **Reference (Manufacturer):** If you forward tickets to the manufacturer, you may record the ticket number in the manufacturer's system here.
- **Service level:** If a service agreement is selected in the ticket, its service level will be displayed here.

The **Activity status**, **Comment**, **Remind** and **Set time** fields can also be found in the **Details** tab in tickets. These are standard fields that are available for all jobs.

## 2.4 Ticket actions

The following sections describe the features for ticket actions:



### 2.4.1 Using ticket actions

You may use ticket actions to execute one or more of the following work steps.

- Notifying participating agents via e-mail (internal and external)
- Archiving sent e-mail with the ticket
- Updating ticket field values and forwarding the ticket internally, if applicable (**Type**, **Status**, **Ticket type**, **Error cause**, **Priority**, **Solution**, **Team**, **Employee**, **Responsible team** and **Responsible employee**)
- Adding entries to the **Internal notes** and **Notes** fields
- Creating a task for the ticket
- Recording time
- Closing the ticket's data record window

### Notes

Ticket actions are not available in the Web Client.

Before ticket actions are available, you must specify them under **Settings** > **Ticket action** (see "2.4.2 Specifying ticket actions" on page 28). This requires the **Helpdesk: Edit ticket actions** right, which you may assign to users the Management Console, in the **User Management** area. Select it in the properties of a user under **Other rights**.

In the Management Console, under **Helpdesk** > **Notification and languages**, you specify the e-mail account to use and select the languages availabe for actions (see "11.2.7 Notification and languages" on page 178).

Ticket actions with e-mail notification can only be executed if the e-mail field selected for each recipient (**To** field) isn't empty.

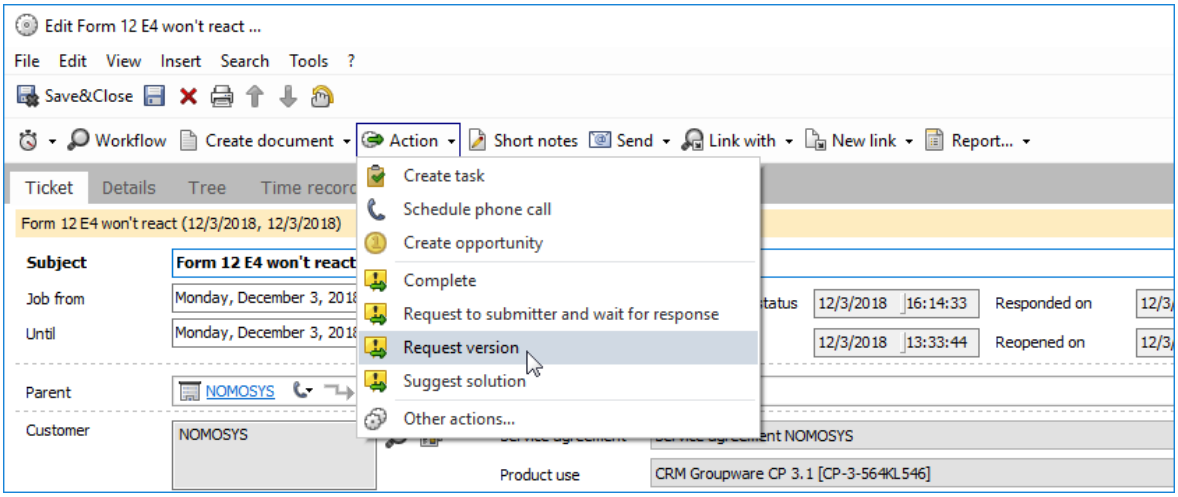
Missing e-mail addresses in the **CC** and **BCC** fields will be ignored.

The validity of the e-mail addresses is not checked before the e-mails are sent.

However, you will be warned when trying to save an invalid e-mail address in the CAS genesisWorld Desktop Client.

## Selecting an action

In the **Action** menu in the toolbar of the data record window for tickets, entered actions will be available for selection.

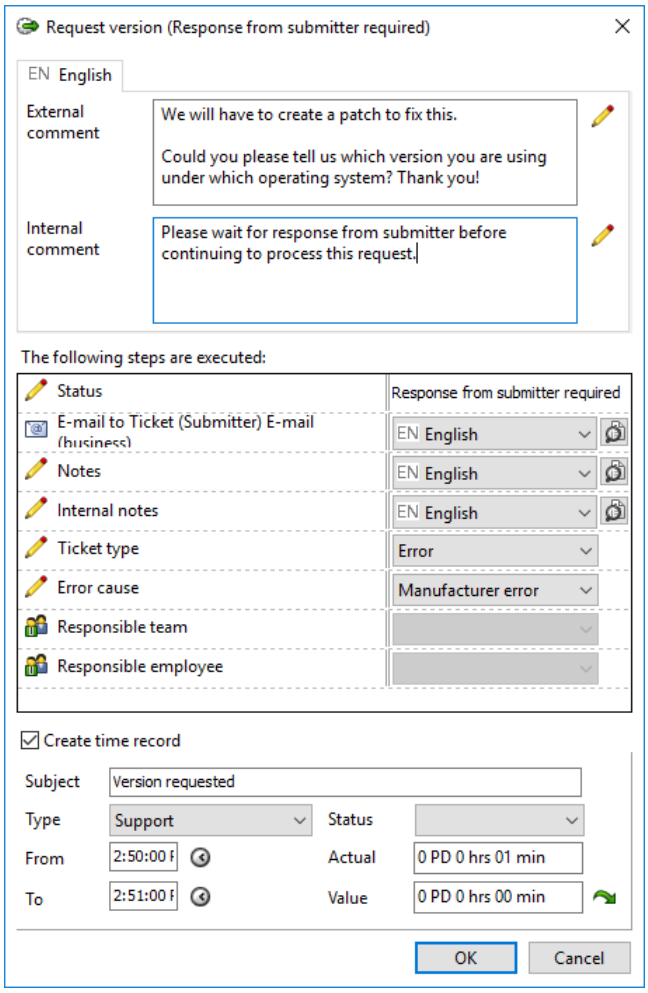



All actions are available here,

- ... whose filter conditions apply to the current ticket and
- ... which have been made available to the current user.

## Executing an action

Selecting an action will open a window where you make additional entries.




- **External comment** and **Internal comment:** Enter your request or message here. The external comment is provided for the **Notes** field and external e-mail and can be preset (see "More steps" on page 35). The internal comment is provided for the **Internal notes** field internal e-mail. When using multiple languages for notes fields or e-mails, select the tab for each language for which you want to enter comments (see below).

## Note

The comment fields will only be available if the associated text variables are used in the action's template. Please note that the internal comment could also appear in external e-mail and external notes, depending on where it is used in the template.

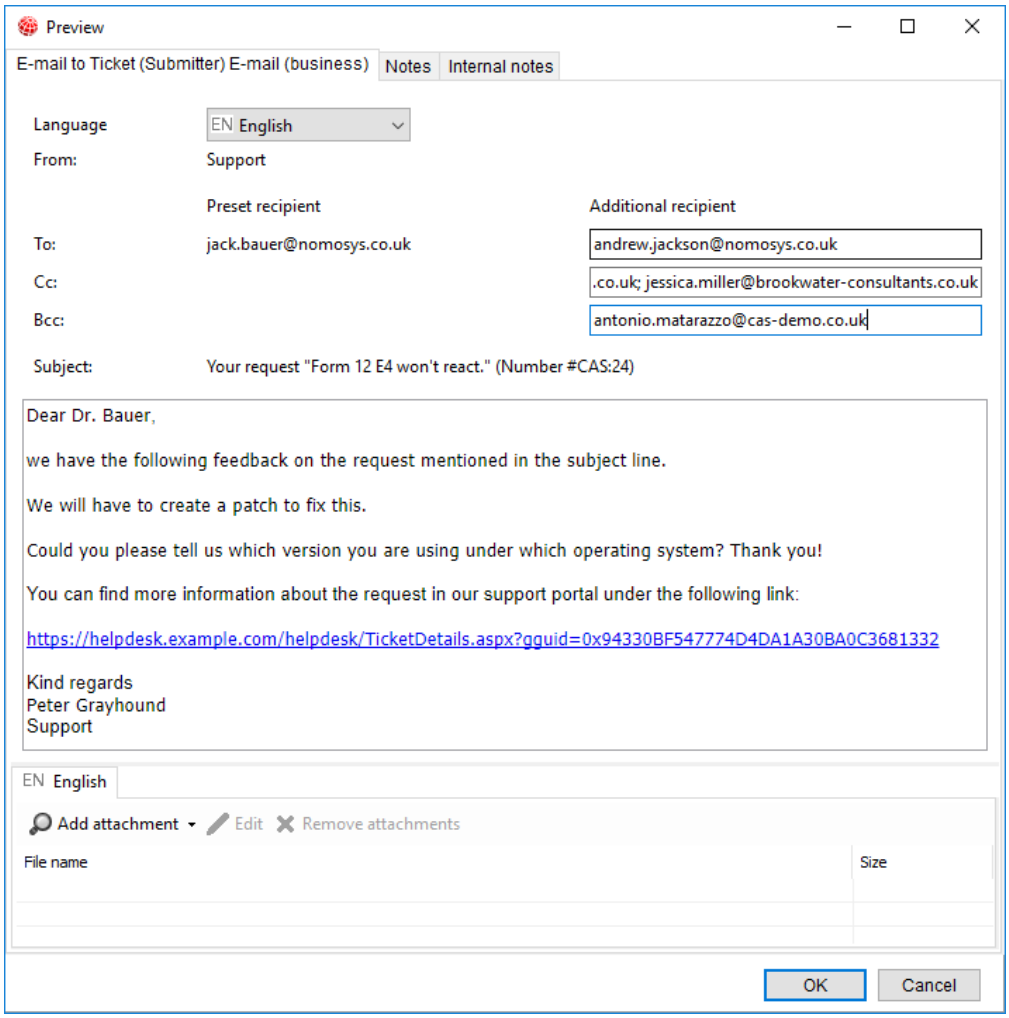
Where exactly the text is entered depends on the template (see "Subject and body" on page 32 and "More steps" on page 35).

- **Overview of work steps:** Here you see the changes to apply to the ticket as well as the e-mails to send. If a task should be created, it will also be displayed here. The **Status** field is always displayed. Here you see the ticket's status after the action is executed. If multiple types are used for tickets, the ticket's new **Type** is also displayed. When an action doesn't modify the status or type, the target values are displayed as grayed out.
  - **Select language:** You may select the desired language for e-mails and notes if the associated templates have been entered in more than one language. The language defaults to the setting you have made in the Management Console under **Helpdesk** > **Notification and languages**. E-mails will preferably use the recipient's **Preferred language** entered in the associated address in the **Details** tab if available for the ticket action. When using multiple languages, you may enter individual comments for each language, which you may select via the tabs on top of the window.

**Display preview:** Here you open a preview of the e-mails and notes.

In the e-mail preview, you may add additional recipients in the **To**, **CC** and **Bcc** fields. Separate multiple recipients in a field with a semicolon (";").

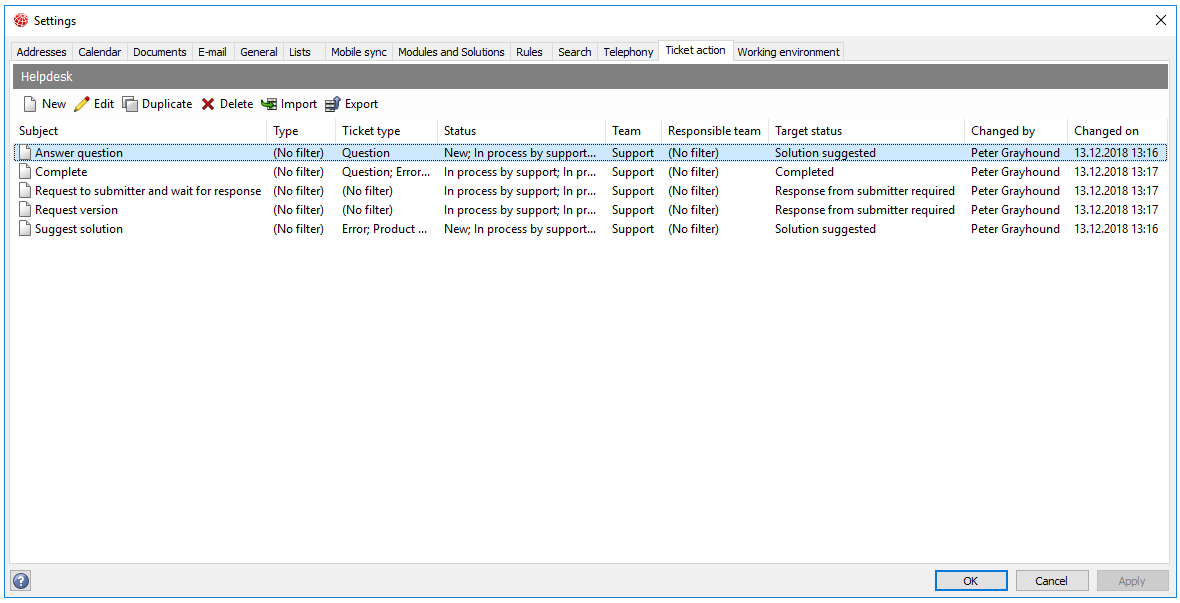
Via the **Add attachment** menu, you may add attachments from files or archived documents. You may also archive files as documents and attach them here.



  - **Change field values:** Fields of the ticket for which this has been set up in the action template may be modified in the overview of work steps
- **Create time record:** The time record for the action is displayed here. If desired, modify the displayed values.
- **Execute action:** By clicking **OK** in the lower right you confirm the execution of the action. All provided works steps will now be executed:
  - Send e-mail and archive it with the ticket
  - Make changes to the ticket
  - Create a task
  - Create a time record

## 2.4.2 Specifying ticket actions

You specify ticket actions under **Settings** in the **Ticket action** tab.




| Subject | Type | Ticket type | Status | Team | Responsible team | Target status | Changed by | Changed on |
|---|---|---|---|---|---|---|---|---|
| Answer question | (No filter) | Question | New; In process by support... | Support | (No filter) | Solution suggested | Peter Grayhound | 13.12.2018 13:16 |
| Complete | (No filter) | Question; Error... | In process by support; In pr... | Support | (No filter) | Completed | Peter Grayhound | 13.12.2018 13:17 |
| Request to submitter and wait for response | (No filter) | (No filter) | In process by support; In pr... | Support | (No filter) | Response from submitter required | Peter Grayhound | 13.12.2018 13:17 |
| Request version | (No filter) | (No filter) | In process by support; In pr... | Support | (No filter) | Response from submitter required | Peter Grayhound | 13.12.2018 13:17 |
| Suggest solution | (No filter) | Error; Product ... | New; In process by support... | Support | (No filter) | Solution suggested | Peter Grayhound | 13.12.2018 13:16 |

The list supplies a quick overview about which actions are available for which tickets:

- The action will be displayed in the **Action** menu under its **Subject**.
- **Type**, **Ticket type**, **Status**, **Team** and **Responsible team** are filter values. The action will be available for all tickets whose type, ticket type, status, team and responsible team are listed here. Additionally, you may filter by the **Error cause** and **Priority** fields.
- The **Target status** will be set in the ticket when the action is executed.
- Under **Changed by** and **Changed on**, you can see who last changed the action when.

For creating and editing actions, the following features are available here.

**New:** Here you create a new action.

**Edit:** Here you edit the selected action.

**Duplicate:** Here you create a copy of the selected action.

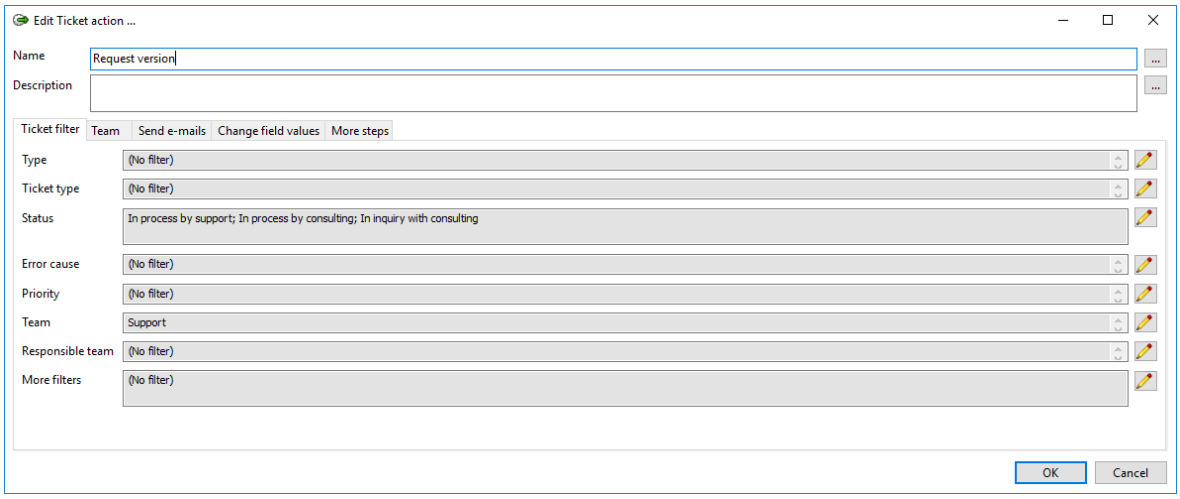
**Delete:** Here you delete the selected action.

**Import:** Here you import previously exported actions.

**Export:** Here you export all selected actions.

## 2.4.3 Editing a ticket action

For creating or editing a ticket option, this window will open.




Here you enter the following settings for the action.

### Name and description

At the top, you name the menu item for Helpdesk users working with ticket actions. The description is optional and is only displayed here.

You may enter the name and description of an action in all client languages which are installed and have been selected for Helpdesk (see "11.2.7 Notification and languages" on page 178).

··· Here you enter the name or description.

### Ticket filter

Here you limit the tickets for which the action will be available via filters.

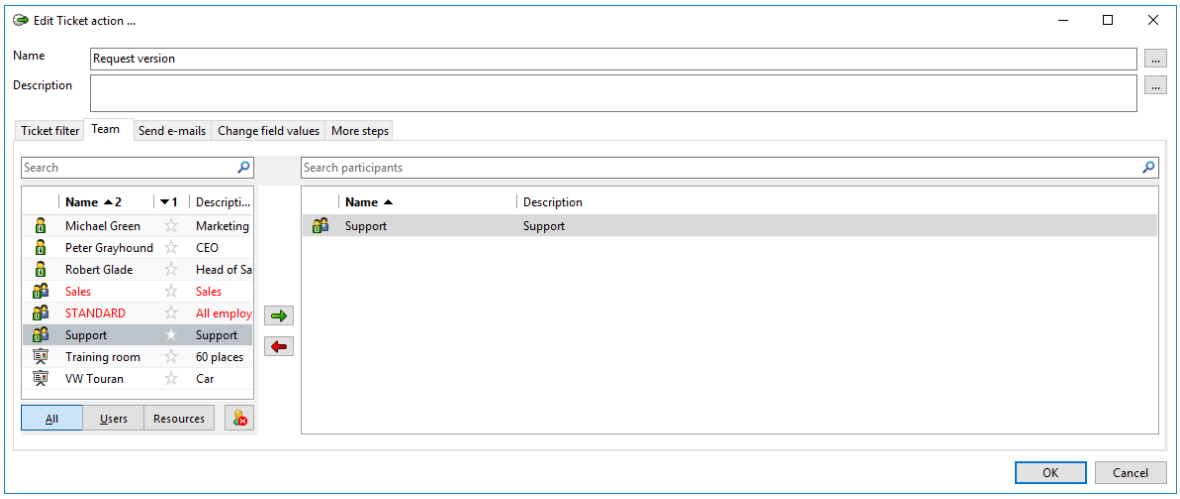
You may filter by the **Type**, **Ticket type**, **Status**, **Error cause**, **Priority**, **Team** and **Responsible team** fields.

Via **More filters**, you may enter a formula of the **Boolean value** type. Here, you have access to any fields available for jobs as well as input help variables, which will be replaced by the correct values in the currently used language in a multi language system.

**Edit filter:** Here you open a selection of entries available for the associated field. Under **More filters**, you open the formula editor here.

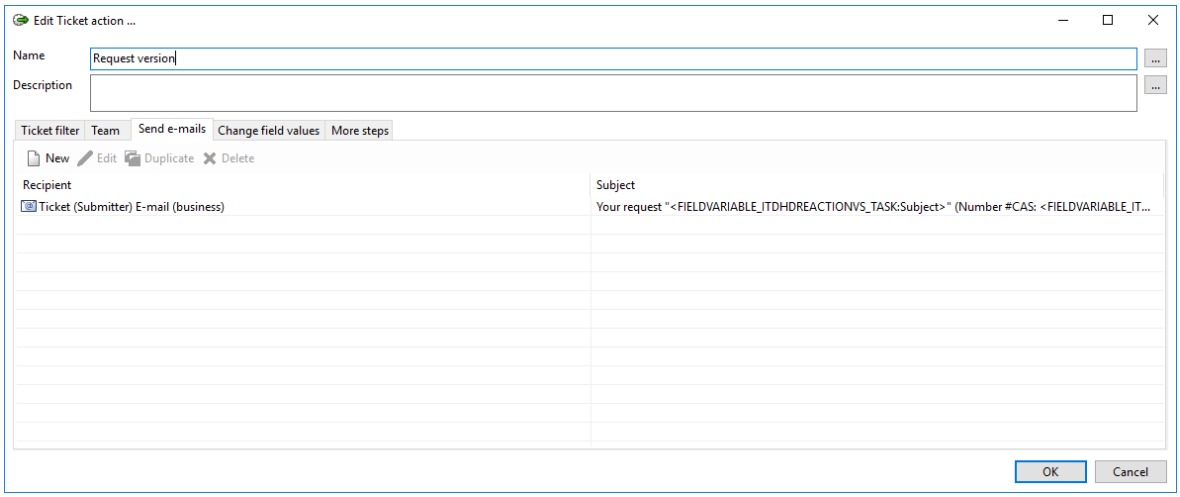
## Team

Here you select the users and groups for which the action will be available.




## Send e-mail

Here you enter templates for e-mails which will be sent when the action is executed.




To create and edit e-mail templates, the following features are available here.

**New:** Here you create a new e-mail template.

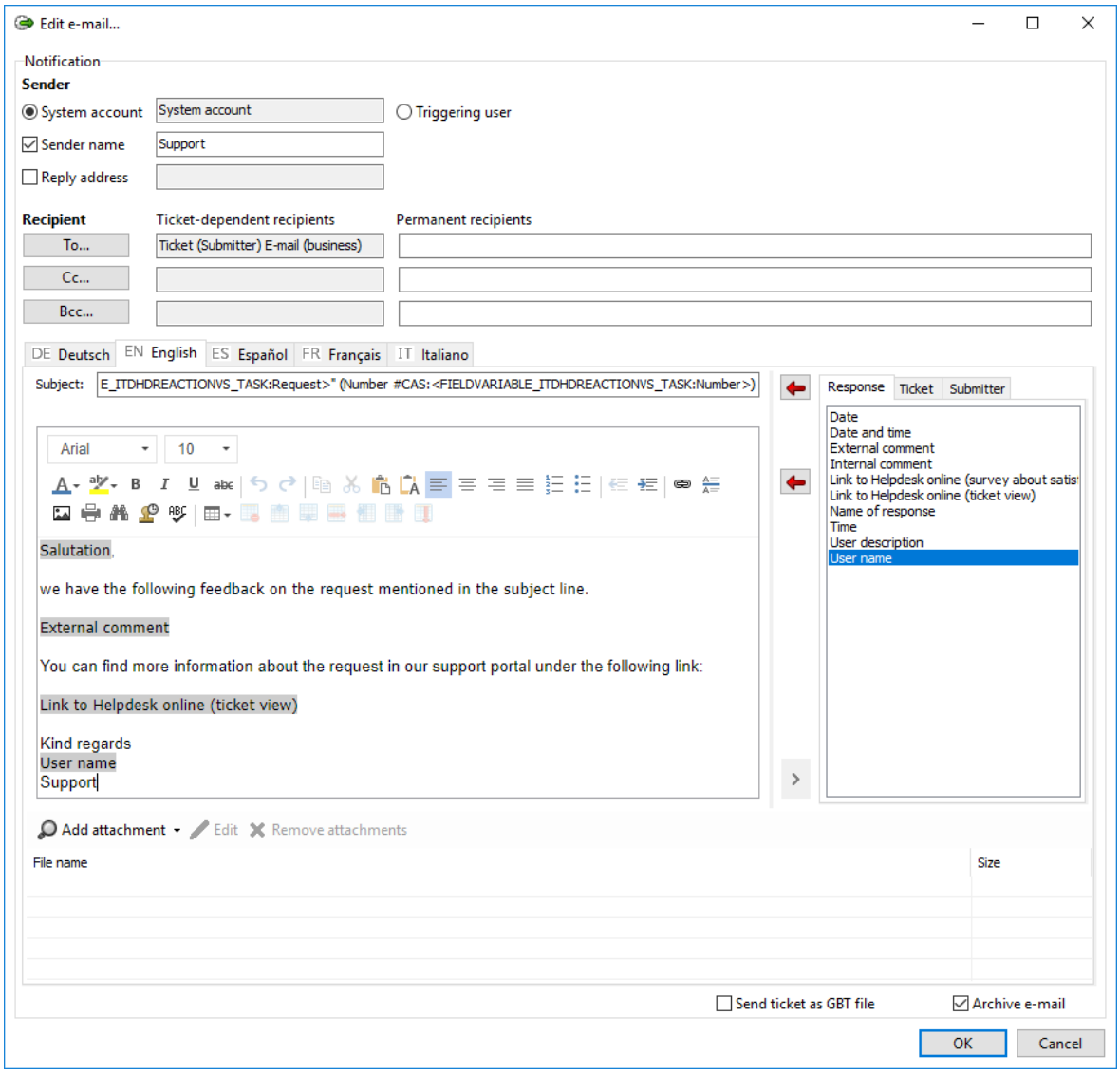
**Edit:** Here you edit the selected e-mail template.

**Duplicate:** Here you create a copy of the selected e-mail template.

**Delete:** Here you delete the selected e-mail template.

## Edit e-mail

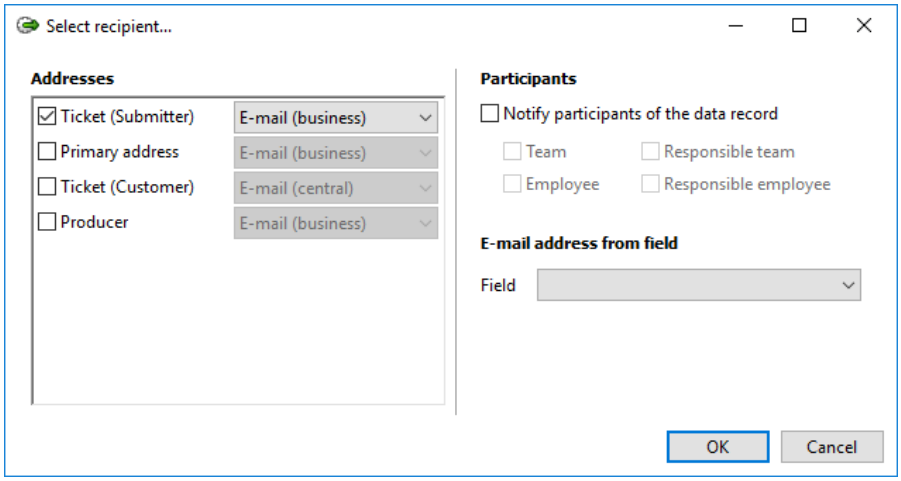
For creating or editing an e-mail template, this window will open.




- **Sender:** Here you select whether the system account or the user executing the action will be specified as sender. In addition, you may enter a different sender name and a different reply-to address.
- **Recipients:** Clicking one of the **To**, **Cc** or **Bcc** buttons will open the **Select recipients** window. Here you select the desired recipients from addresses linked to the ticket as well as the ticket's participants.

  In addition, you may read user names and e-mail addresses from a text field.

  You may also enter permanent recipients in the **To**, **CC** and **Bcc** fields directly in the **Edit e-mail** window. Separate multiple recipients in a field with a semicolon (";")




- **Addresses:** Select here all linked addresses that should receive a copy of the e-mail. For each selected address, you will be prompted to select the e-mail field to use.
- **Participants:** Specify here whether participants of the request should be notified and select the desired fields. The e-mail will be sent to the e-mail addresses entered in the **User Management** area of the Management Console for the selected CAS genesisWorld users or for the members of the selected groups.
- **E-mail address from field:** Select here a job text field in which recipients will be specified (e.g., select **Communication** instead of the **Submitter** link if you are using the support e-mail account as described in section 12.6 on page 218).

  Multiple recipients can be entered in the selected field, separated by commas (",") or semicolons (";").

  E-mail-addresses and CAS genesisWorld user names may be specified as recipients.

- **Subject and body:** In the lower half of the window, you enter the subject and body of your message. You may enter the template in all client languages selected for Helpdesk (see "11.2.7 Notification and languages" on page 178).

  You may use the following text variables.

  - **Response**
    - **User description** and **User name:** The user executing the action
    - **Date and time:** Time at which the action is executed
    - **External comment** and **Internal comment:** Entries made by the user when the action is executed
    - **Link to Helpdesk online (ticket view):** See "Sending links for opening the detail view" on page 139
    - **Link to Helpdesk online (request for feedback):** See "12.4 Setting up a request for feedback" on page 209
    - **Name of response** (ticket action)

- **Ticket:** Ticket fields
- **Submitter:** Submitter's address fields

If e-mails created from the template and replies to them should be linked with the associated ticket when the e-mails are archived, enter the key defined in the Management Console into the subject line (see "11.3.4 E-mail" on page 183).

Please note that a blank space must be entered before the key field (e.g., when no prefix was defined and **Number** was selected as field, the key will be "# Number#").

## Note

In order to use links to Helpdesk online in e-mails, you must enter the associated link in the Management Console (see "**Link**" on page 155).

- **Attachments**

  **Add attachment:** Here you may **Add existing documents** via the search window or archive a new file and add it via **Create and add new document**.

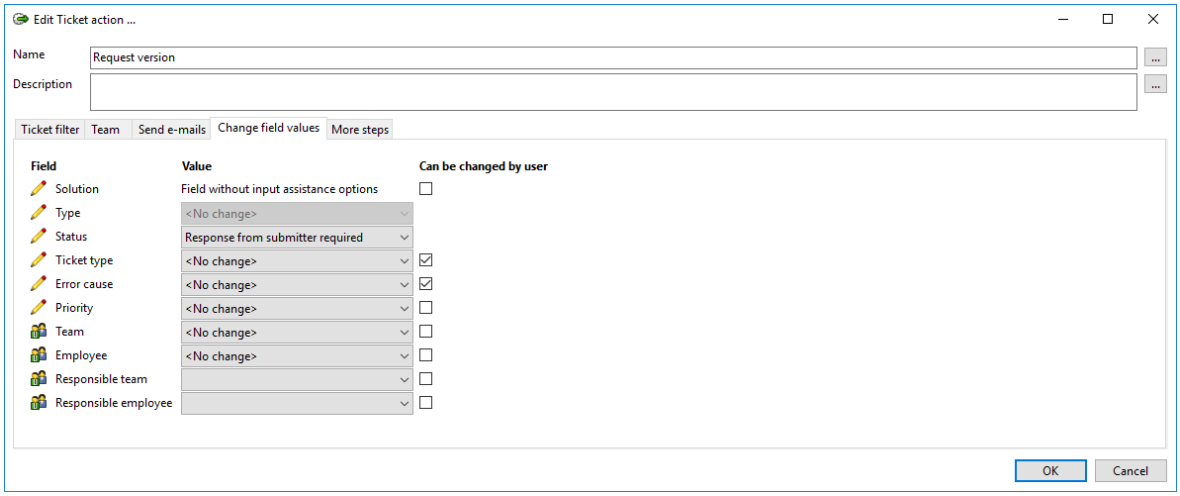
  **Edit:** Here you edit the selected document in its data record window.

  **Remove attachments:** Here you remove the selected documents.

- **Send ticket as GBT file:** Select this option to include a copy of the ticket as an attachment in the CAS genesisWorld transfer file format.
- **Archive e-mail:** Select this option if the e-mail should be archived with the ticket and all addresses selected as recipients after sending.

## Change field values

Here you specify which fields of the ticket should be changed by the action.




Select the desired **Value** for each **Field** you wish to change.

Select the **Can be changed by user** option if the user executing the action should have the possibility to modify the value.

The **Can be changed by user** option also allows an action to be executed when the field value selected here is not available in a ticket. With this option, the first available value will be selected for the associated field and may be changed by the user if more values are available. If a field value selected here is not available in a ticket and the **Can be changed by user** option has not been selected for the field, the action will be cancelled when it is selected and the field and missing value will be displayed.

When you select the **Can be changed by user** option for the **Solution** field, a separate field for entering the solution will be displayed when the action is executed. The field will automatically adopt a solution that has already been entered in the ticket and will be transferred back to the ticket's **Solution** field as displayed when the action is confirmed.

The selection for the fields available here can be limited as follows in a ticket:

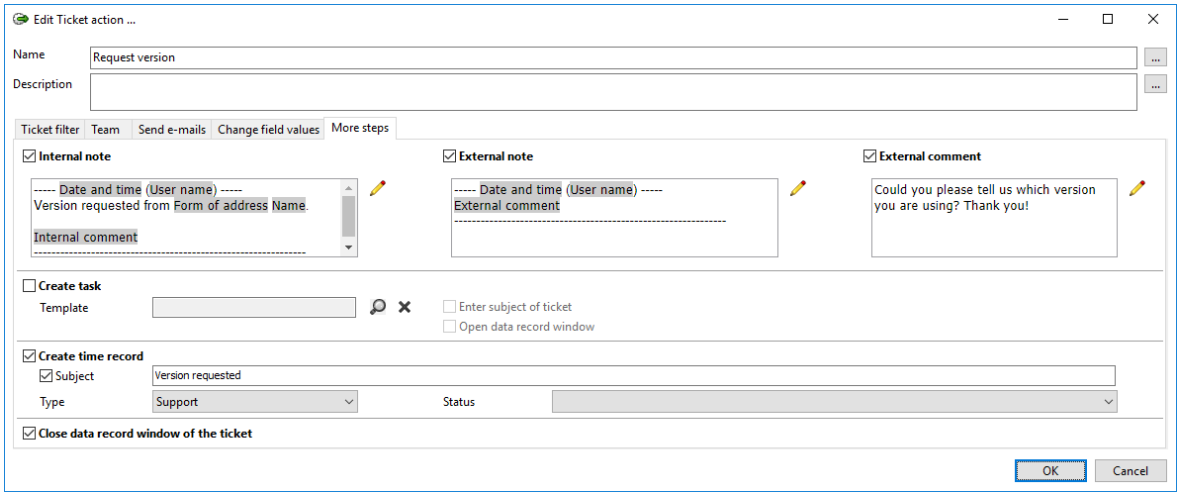
- The selection in the **Status** field may depend on the **Type** (MC > Database > Jobs > Type/Status > Input help). When multiple types are used for tickets (MC > Helpdesk > General) and no type is selected here, all status options for all ticket types will be available for selection. In this case, if you select a status here, the action will only be executable in tickets for whose type the selected status is available.
- You may only select an **Error cause** if that field has been cleared for the selected **Ticket type** (MC > Helpdesk > General). When you select a **Ticket type** for which no error cause can be specified, it will automatically be transferred to the **Error cause** field.
- The selection in the **Priority** field is limited by the service agreement or by the default settings for tickets without a service agreement if response deadlines are used (see "**Priority**" on page 18).
- The selection in the four participant fields **Team**, **Employee**, **Responsible team** and **Responsible employee** may be limited by access permissions, as is usual in CAS genesisWorld.

  In the team fields, only groups in which the user is a member with at least reading permissions or to which she has external access will be available for selection.

  In the employee fields, all members of the group selected as the respective team will be available for selection.

## More steps

Under **More steps**, you specify entries for the notes fields. You decide whether a task should be created, whether time is to be recorded automatically for the action and whether the ticket's data record window should be closed after the action is executed.




- **Internal note** and **External note:** Here you specify entries to insert at the beginning of the **Internal notes** and **Notes** fields. As for e-mails, you have access to **Response**, **Ticket** and **Submitter** field text variables, see "Subject and body" on page 32).

  The **Internal notes** field will only be available if you have set it to be displayed in tickets in the Management Console (see "Notes" on page 150).

- **External comment:** Here you may preset the external comment, with access access to **Ticket**, **Customer** and **Submitter** field text variables.

  Users who execute the ticket action may simply accept, modify or supplement the preset external comment.

- **Create task:** Here you specify whether a task should be created for the ticket.

  If desired, select a template to use via the search.

  Also state whether the ticket's subject should be adopted as the new task's subject and whether the task should open automatically in the associated data record window once the ticket action has been executed.

- **Create time record:** Here you specify whether time should be recorded for the action automatically. In the default setting, the ticket's subject will be adopted as the time record's subject. Alternatively you may enter a different subject for time records for the selected action.

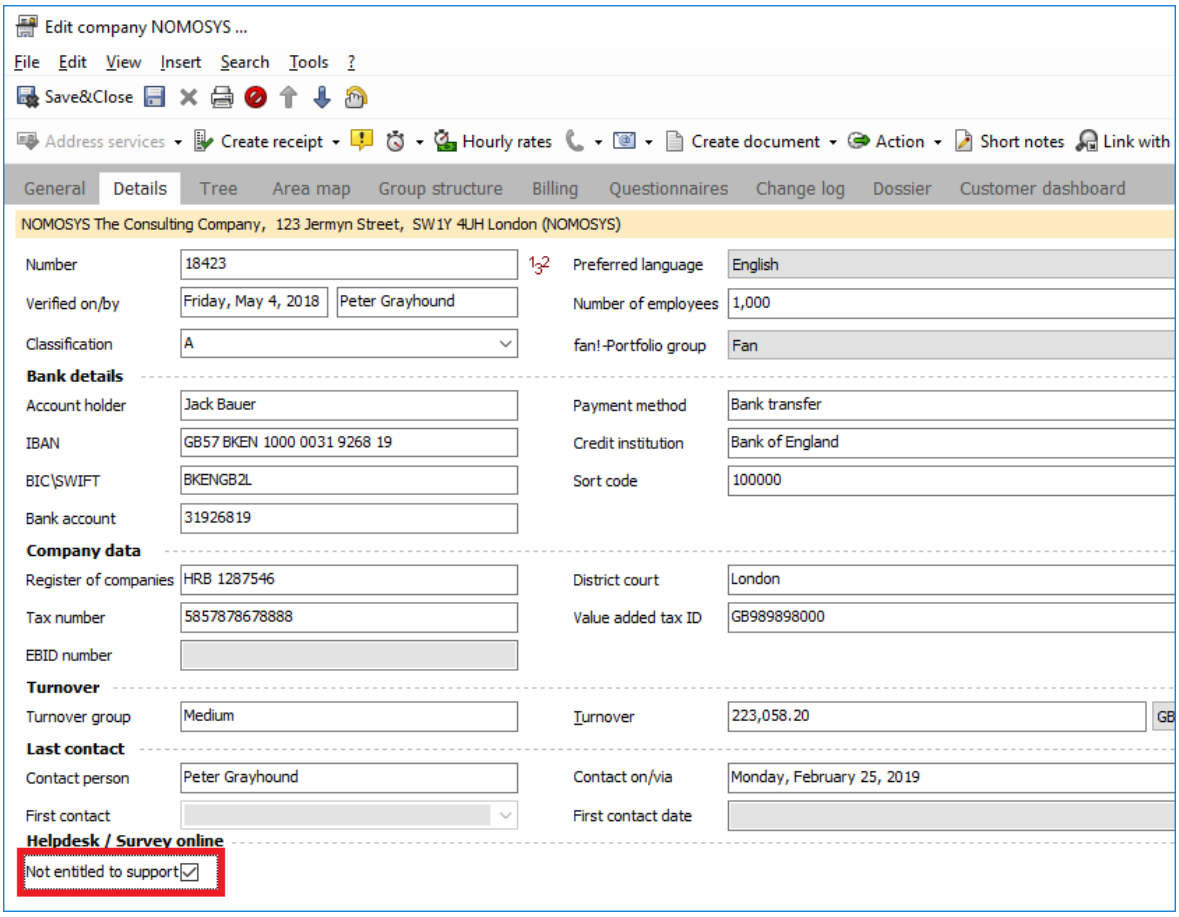
  In addition, you select here the desired type and status of the time record.

- **Close the data record window of the ticket:** Here you specify whether the data record of the ticket should be closed automatically after the action has been executed.

## 2.5 Blocking support entitlement

You can block the support entitlement for companies and individual contacts in **Details**.

When you block a company, the block also applies to all associated contact persons.




- **Support block in CAS genesisWorld (Desktop Client & Web Client):** If you open or create a ticket for a blocked address or enter a blocked address as a ticket's customer or submitter, you will be notified of the block.

  Tickets can then still be created or edited and saved.

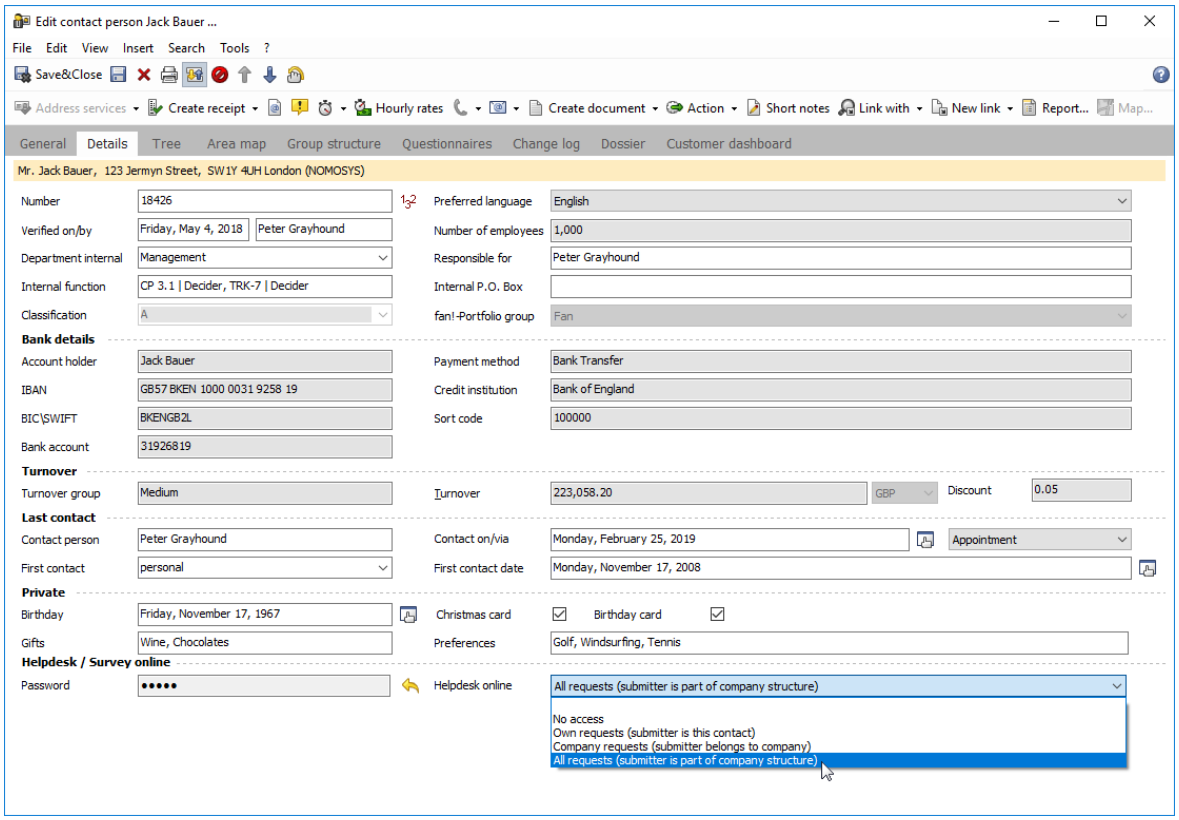
- **Support block in Helpdesk online:** Contacts belonging to a blocked company as well as blocked single contacts can no longer log on to Helpdesk online.

  You may store the associated message in different languages in the Management Console under **Helpdesk** > **Helpdesk online**.

  Blocked customers are no longer available for selection by their supervising partners for new inquiries in Helpdesk online (see "**This request is for**" on page 141).

## 2.6 Setting up access for Helpdesk online

To permit access to a company contact or a single contact, enter a password and select an access level in the **Details** tab.




**Enter password:** Click **Reset** to enter a password or change the stored password. After saving, it will be displayed encrypted as ●●●●●, regardless of its length.

Customers can also set their own passwords in Helpdesk online via the **Activate account** link on the login page.

Section "12.1 Helpdesk online account enabling notification" on page 195 describes setting up a notification rule for sending customers a direct link to the activation page when their access is enabled by selecting an access level in the **Helpdesk online** field.

In the **Helpdesk** area of the Management Console, under **Helpdesk online** > **General**, you can specify a minimum length and other requirements for passwords. All of these requirement will be checked when setting or changing the password in an address record in the Desktop Client as well as in Helpdesk online by a customer (see **Activate password guideline for portal users** on page 155).

- Via an **Action**, you may enable Helpdesk online access for multiple contacts at once, all of which will be invited for activation via the notification rule (see section "**Activating Helpdesk online access for multiple contacts via an action**" on page 39).

- **Assign Helpdesk online password:** Once the account has been activated by entering a password, either by the customer himself in Helpdesk online or by an employee in the Desktop Client, the the **Assign Helpdesk online password** field is set to "true".

  This field isn't displayed in the data record window but may be used for filtering.

- **Helpdesk online:** For new contacts, no access level is initially selected. New contacts therefore have no access to Helpdesk online, just like with the **No access** level. Select the desired access level here to grant contacts access to Helpdesk online. Please note that the account will only be activated after entering a password (see previous page).

  The access level controls which tickets the user may see in Helpdesk online.

  - **No access:** The contact hasn't been granted access to Helpdesk online.

    Select this option to indicate that access has been actively denied to a contact in order to distinguish it from contacts for which no access level has been selected yet.

  - **Own requests (submitter is this contact):** The contact has access to all requests in which he has been entered as submitter.

  - **Company requests (submitter belongs to company):** The contact has access to all requests in which he or another contact of the same company has been entered as submitter.

  - **All requests (submitter is part of company structure):** The contact has access to all requests in which he or another contact of the same company has been entered as submitter. The contact also has access to all requests in which a contact of another company has been entered as submitter if that company has been assigned to his company via a Parent/Child link, either directly or indirectly, and therefore appears in the **Company structure** view of his company.

    As individual contacts are treated like a company and contact in one data record in CAS genesisWorld, a contact with this access level can also see requests from individual contacts which appear in his company's **Company structure** view.

    If this access level is assigned to an individual contact, he will be able to see, in addition to his own requests, any requests from companies and individual contacts which appear in his own **Company structure** view.

    Requests from company contacts which have been assigned to the company of a contact with this access level or to an individual contact with this access level via a Parent/Child link, directly or indirectly, in the **Company structure** view, will not be displayed in Helpdesk online unless their associated company also appears in the **Company structure** view.

  With the **Has ticket access** link, you can additionally display tickets submitted by other addresses (see "11.3.5 Links" on page 185).

  Those will then be displayed in Helpdesk online to users with either of the **Company requests** or **All requests** access levels (see "**Submitter**" on page 137).

- **Creating tickets for customers:** The **Has ticket access** link also enables creating tickets for linked addresses via request types with a customer selection (see "**This request is for**" on page 141).

  Additionally, using such request types, Helpdesk online users may also create tickets for addresses assigned to the own company via the **Customer** link (company to company).

  Users with the **All requests (submitter is part of company structure)** access level may also create requests of such types for any company linked to a company that is part of their own company's **Company structure** via the **Customer** link.

  In addition to companies, links to individual contacts are also supported here.

- **Activating Helpdesk online access for multiple contacts via an action**

  ✓ Select the desired addresses in a list view (e.g., a list of search results).

  ✓ In the **Action** menu in the toolbar, select the **Other actions...** item.

  ✓ As **Table field**, select the **Helpdesk online** field.

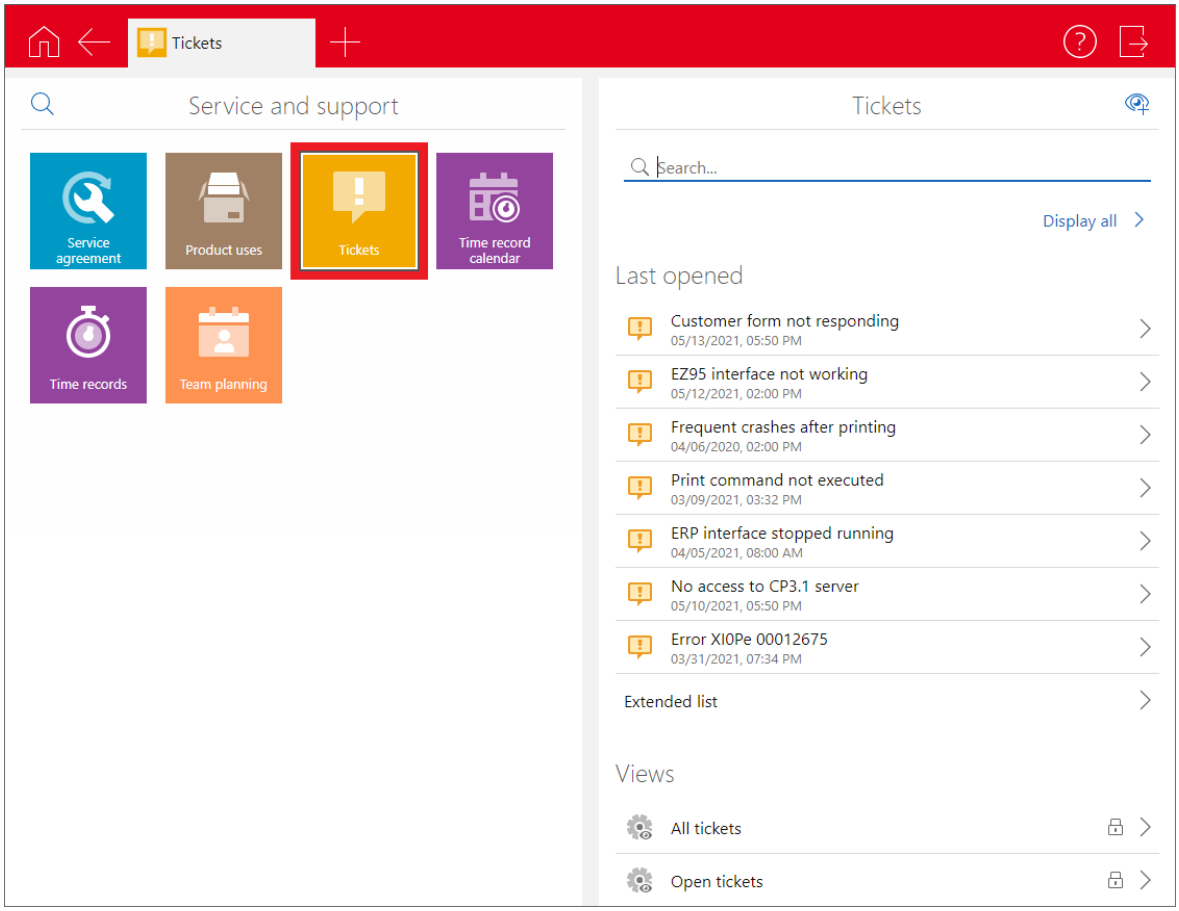
  ✓ As **Value of change**, select the desired access level.

  ✓ Click **Execute action**, to change the access level for all previously selected contacts.

  Please note that the selected contacts will only be automatically invited to activate their accounts if you have configured an appropriate notification rule (see "12.1 Helpdesk online account enabling notification" on page 195).

## 2.7 Tickets in the Web Client

With the **Tickets** app in the **Service and support** app group, you can see and edit existing tickets. To create new service tickets, please use te action menu in the detail view for the associated data record.




- In the app start for the **Tickets** app, you have access to your tickets and job views.
- Click on the eye icon to create a new ticket list view.
- Click on a ticket to open the detail view. You can also edit or delete the ticket here.
- If the automatic notification has been activated and configured (see "**Miscellaneous**" on page 151), the ticket's submitter will be informed when the ticket is created or when the notes or solutions are changed. This requires confirmation by the user.
- Additionally, you can create tickets for addresses, phone calls and e-mails.

  To do this, in the associated detail view, open the action menu with the three dots [...] and select **Create** > **Ticket**.

Click on the question mark at the top right to open the online help pages for more details.

# 3 FAQ management

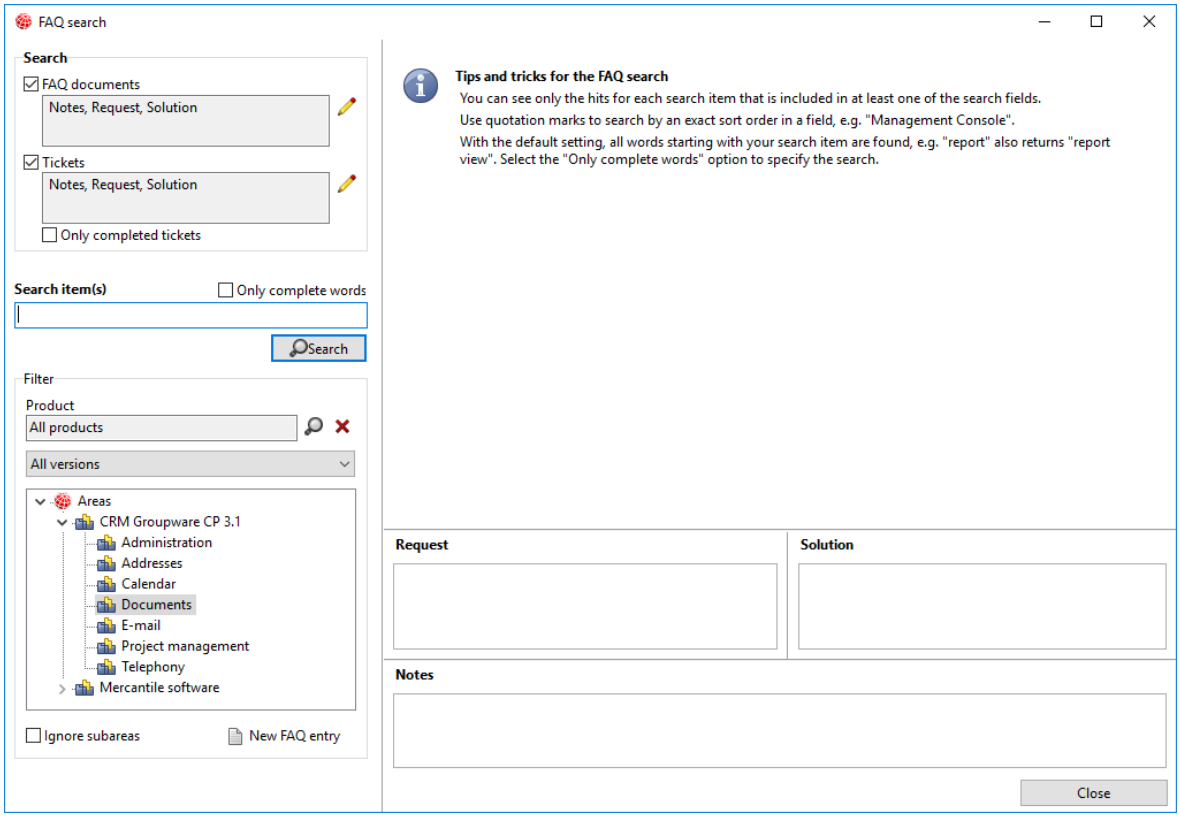
The following sections describe the default features for FAQ documents:



The FAQ search in Helpdesk online is described under "10.7 FAQ search" on page 134.

## 3.1 FAQ search and creating FAQ documents

The FAQ search finds FAQ documents and tickets in the selected area. In addition to the area selection, a product and version filter are available.




You may also create new FAQ documents for a selected area. The selected product and version will not be transferred to the new FAQ document.

- **Opening the FAQ search:** The FAQ search is available in the main window's **Search** window with Helpdesk. While the main window is active, you can also open the FAQ search directly via the [F6] key.

**FAQ search:** You can also open the FAQ search from any ticket using this button to the lower right next to the **Request** and **Solution** fields.

In the FAQ search, you have the following options.

- **Search:** Here you determine which data records and fields should be searched.

  **Select fields:** All text and notes fields are available for selection here.

  - **Only complete tickets:** With this option, only tickets marked as completed via the status will be found.

- **Search item(s):** Only hits in which each search item appears at least once will be displayed. Use quotation marks to search in a field in exact order (e.g., "Management Console").

  - **Only complete words:** If you are using the full text search, all words beginning with your search item will be regarded as hits. Select this option if only those words which precisely match your search items should be regarded as hits.

**Search:** Click here to start the search.

- **Filter:** You may filter the search by product, version and area. In the Management Console, you specify under **Helpdesk** > **General** whether the product, version and area should be adopted from the ticket when the search is opened.

  Via the area selection you may also create new FAQ documents for the selected area. The selected product and version will not be transferred to the new FAQ document.

  **Search product:** Here you select a product in the **Search** window.

  **Delete product filter:** Here you reset the filter to **All products**.

  - **Version:** For versioned products, you may select the version here.

  **Select area:** Select an area here. Items below the selected item will also be found.

  You may enter areas and sub-areas in the Management Console, in the **Database** area, as input help items for the **Area** field of products (see "11.1 Settings in the Database area" on page 147). In the **General** tab of a product, you may assign an area to that product (see "5.1.1 General" on page 50).

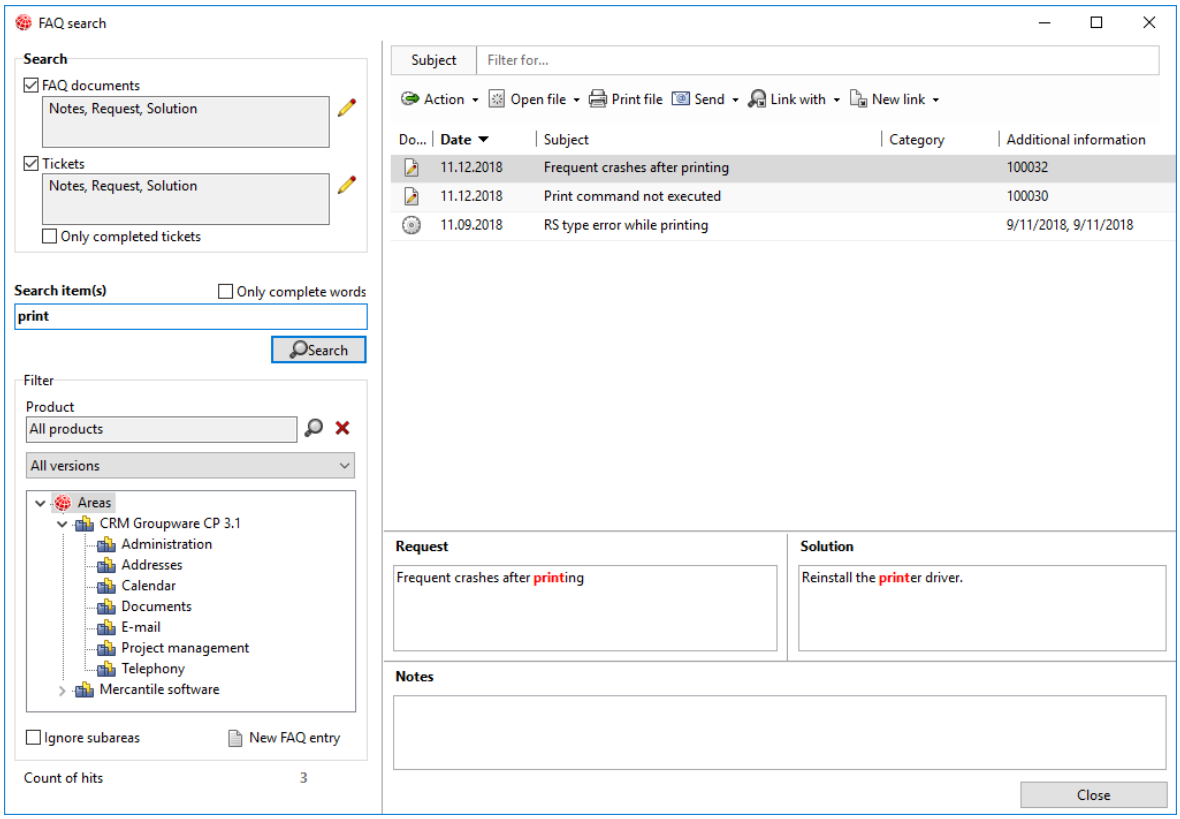
  - **Ignore subareas:** Select this option to only find entries in the selected area. In this case, items below the selected item will not be found.

  **New FAQ entry:** Here you create a new FAQ document for the selected area.

  The selected product and version will not transferred to the new FAQ document.

  However, when selecting an area with a product assignment (see "5.1.1 General" on page 50), the assigned product will also be applied automatically.

- **Search results:** Found search results will be displayed in a mixed list. The contents of the **Request**, **Solution** and **Notes** field will be displayed at the bottom. Your search items will be highlighted in red.




- **Transfer solution:** Here you overwrite the **Solution** field of the ticket from which you opened the search with the displayed solution.

## 3.2 Views and features for FAQ documents

FAQ documents are documents of a certain type. The associated fields and features will be displayed in the document's data record window when the FAQ type is selected.

The following standard features are available for FAQ documents.

- **Data record window** for documents; the **FAQ** tab is available in addition to the standard tabs for documents.
  - **Type** for marking as FAQ item
  - **Status** for publishing in Helpdesk online
  - **Primary links** to address, project and job, displayed in the tree view and in analyses (with Report module)
  - **General links** to any other data records
- **Creation** with FAQ type from tickets or from the FAQ search
- **Global search** in all fields such as **Subject**, **Product** and **Area**, configurable via **Settings** > **Search**; separate **FAQ search** for FAQ documents and tickets
- **Views** in the program navigator (list, dossier, tree) and in the link navigator (link list)

## 3.3 Creating an FAQ document

In every ticket, the **Save request and solutions as FAQ** button is available to the right of the **Request** and **Solution** fields.

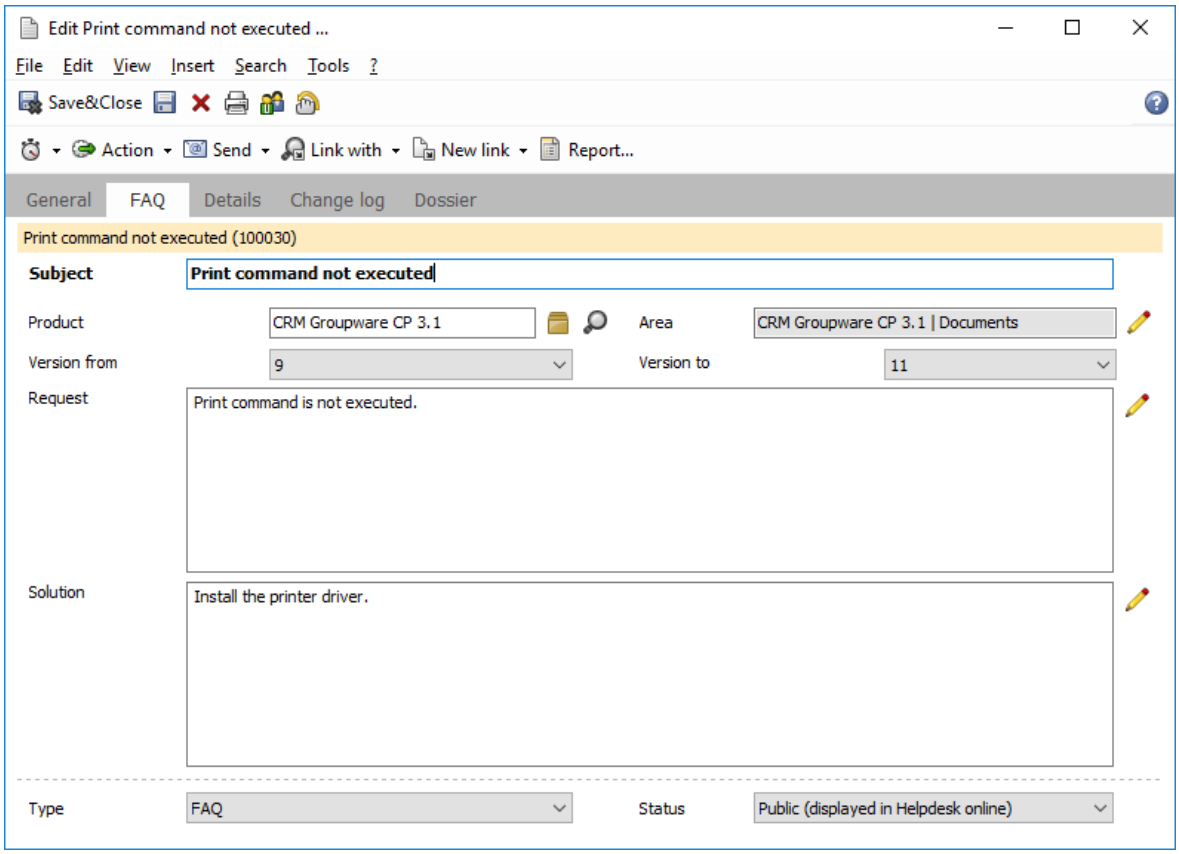
You may also create FAQ documents directly for a specific area via the FAQ search (see "3.1 FAQ search and creating FAQ documents" on page 41).

**Save request and solution as FAQ:** Here you create an FAQ document as a short note. The following fields will be transferred from the ticket, if available.

- Subject
- Product
- Area
- Request
- Solution

If an FAQ document has already been created for the ticket, you may open it in the document window by clicking on the FAQ button.

## 3.4 The data record window for FAQ documents




- **Subject:** The subject will be transferred from the ticket.
- **Version from / to:** Select here the first and last associated version. You may enter the available items for the selected product (see "5.1.2 Version" on page 52).
- **Product:** Select here the associated product. Selecting an area assigned to a product (see "5.1.1 General" on page 50) will select that product.
- **Area:** Select here the area to which the FAQ relates.

  If applicable, the associated product will also be selected.

  You may enter areas and sub-areas in the Management Console, in the **Database** area, as input help items for the **Area** field of products (see "11.1 Settings in the Database area" on page 147). In the **General** tab of a product, you may assign an area to that product (see "5.1.1 General" on page 50).
- **Request / Solution:** As in a ticket, you open the descriptions in separate windows by clicking on the buttons next to the fields.
- **Type:** The FAQ type will be entered automatically. You select the type to use in the Management Console under **Helpdesk** > **General** (see "11.2.1 General" on page 148).
- **Status:** When the FAQ search in Helpdesk online is active, you may publish FAQ documents in Helpdesk online via the status (see following section).

## 3.5 FAQ documents in Helpdesk online

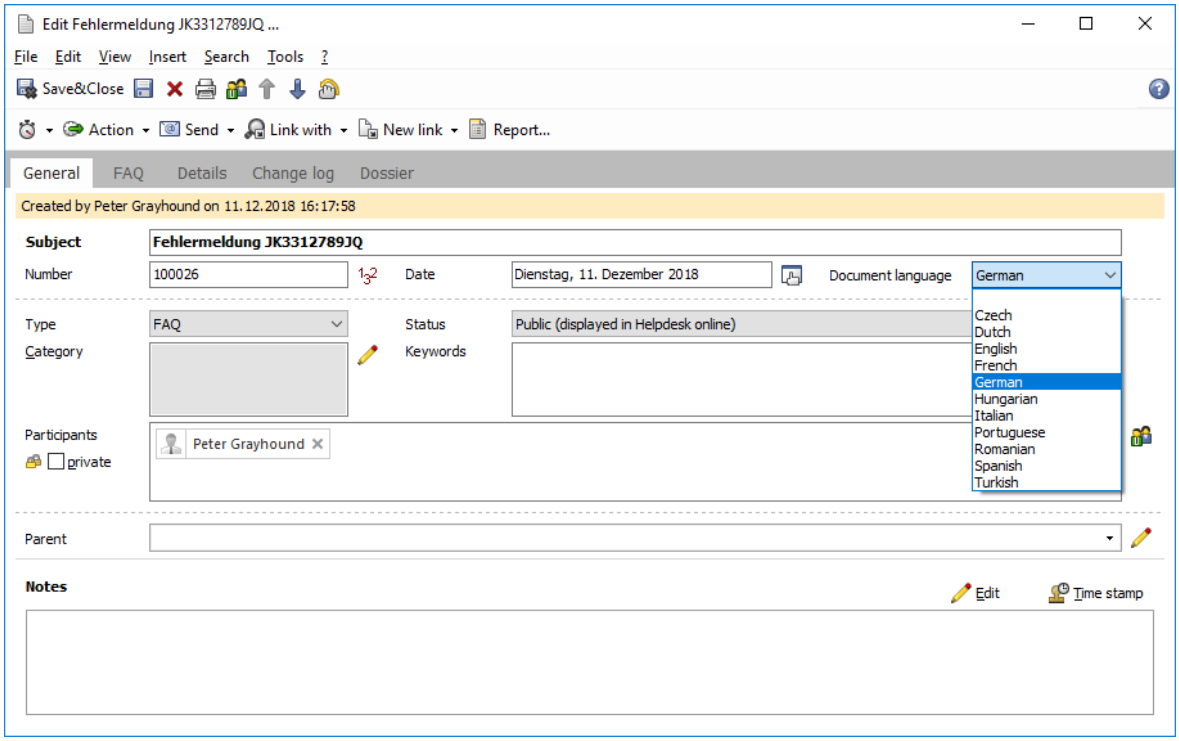
Depending on your settings, an FAQ search is also available in Helpdesk online (see "10.7 FAQ search" on page 134). You can find the associated settings in the Management Console under **Helpdesk** > **Helpdesk online** > **FAQ** (see "FAQ" on page 170).

When the FAQ search is active, any document with the FAQ type and a publishing status will be displayed in Helpdesk online.

### 3.5.1 Document language and language selection

In the **Helpdesk** area of the Management Console, under **Helpdesk online** > **FAQ**, you may activate a language selection in the FAQ search in Helpdesk online (see "**Language filter for FAQ entries**" on page 171).

If you do, all languages will be available for selection there which have been selected for the **Document language** field in the **General** tab of any displayed FAQ document:




### 3.5.2 Downloads for FAQ documents

With the default setting, all documents assigned to an FAQ document via general links will be available for download in the associated FAQ view in Helpdesk online.

You may turn off this feature or limit it by entering filter settings in the Management Console under **Helpdesk** > **Helpdesk online** > **FAQ** (see "**Documents referring to FAQ document**" on page 171).

# 4 Using e-mail templates

E-mail templates are available for tickets. Various types of information from the ticket may be embedded dynamically. Documents you link with templates will be copied when using the template and attached to the e-mail.

E-mail templates are also available directly for contact persons and individual contacts.

## Note

> The e-mail template selection for tickets offers only **E-mail campaign** documents with the **Ticket e-mail template** category.
>
> The e-mail template selection for addresses offers any **E-mail campaign** documents with the **E-mail template** and **Ticket e-mail template** categories.
>
> Document templates will not be available.

In tickets, the **Send e-mail** button is available next to the **Request** field.

Click **Send e-mail** to select the desired recipient from the available e-mail addresses of the submitter.

If a product with a manufacturer link is selected, the manufacturer's e-mail address will also be available for selection here (see "5.1 Products" on page 50.)

✓ Select the desired recipient.

✓ Select the desired template.

The e-mail will be generated from the selected template, addressed to the desired recipient and opened. You may now edit or extend it, send it and archive it as you wish.

E-mail templates are also available in the contact menus for the customer and submitter.

- **Get in touch:** Here you open a menu of phone numbers and e-mail addresses available for the customer or submitter. In the sub-menu for sending an e-mail, you access stored e-mail templates.

E-Mail templates are also directly available in addresses.

Via the **E-mail templates** button in the toolbar of a contact person's or individual contact's data record window you open the selection of templates.

## Creating ticket e-mail templates

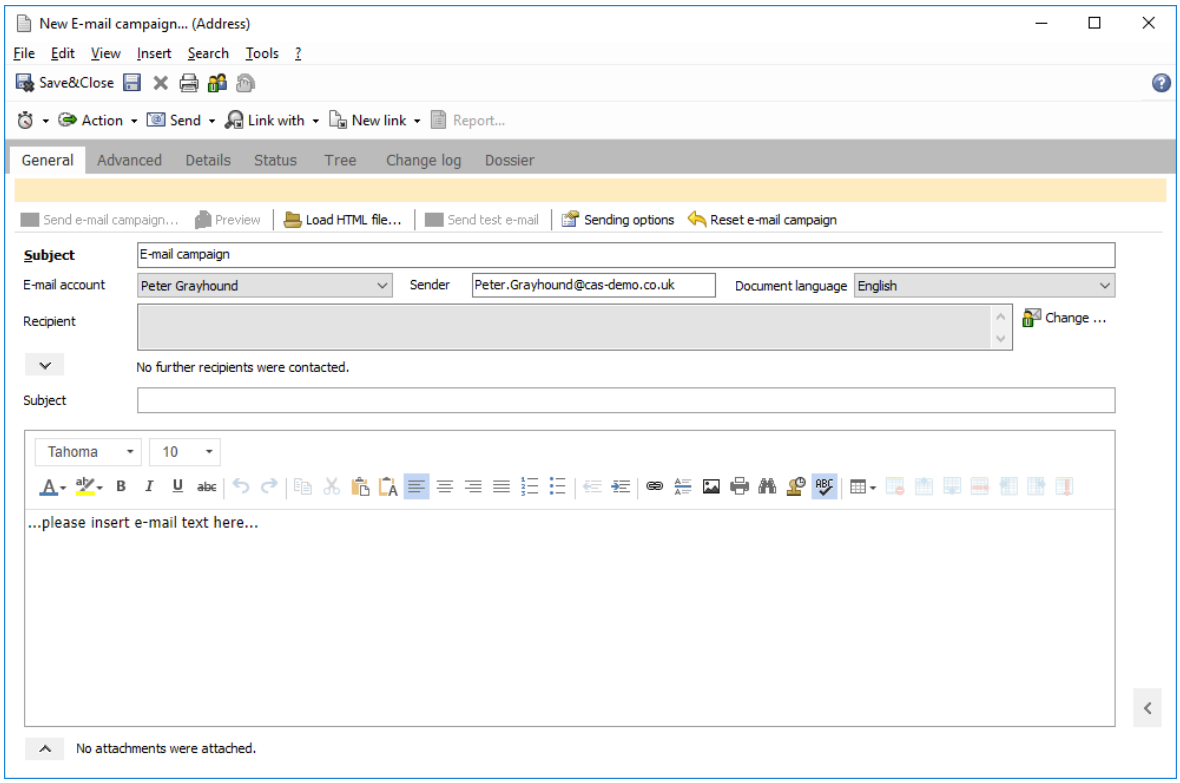
You create ticket e-mail templates as documents using the **E-mail campaign** template.

The **Ticket e-mail template** category in the document marks it as an e-mail template and makes it available in the e-mail template selection.

✓ Select **New** > **Document** from the **File** menu or select **Document** from the **New** menu in the main window to create a new document.

✓ Select the **E-mail campaign** default template and click **OK** to confirm.

- The data record window for e-mail campaigns will open.




- **Subject:** The document's subject will be displayed in the template list.
- **E-mail subject:** Enter the subject for the e-mails to create from the template here.

  Click on the arrow button at the lower right to access address fields, which you may insert via the **Recipient** list.

  To use field variables defined for tickets in the subject line, put them in angle brackets (e.g., **<TicketNummer>** for the ticket number.)

  If e-mails created from the template and replies to them should be linked with the associated ticket when the e-mails are archived, enter the key defined in the Management Console into the subject line (see "11.3.4 E-mail" on page 183).

  Please note that a blank space must be entered before the key field (when no prefix was defined and **Number** was selected as field, the key is "# <TicketNummer>#").
- **Body:** Use the CAS genesisWorld text editor to create the e-mail body.

  Click on the arrow button at the lower right to access address and ticket fields.

  - Insert address fields via the **Recipient** list.
  - Insert ticket fields via the **Field variables** list.

- **Field variables in the subject and body:** When you activate Helpdesk, field variables for the following ticket fields will be created: **Solution**, **Notes**, **Number**, **Priority**, **Request**, **Product**, **Reference number**, **Status**, **Subject** and **Participants**.

  If you need additional field variables for tickets, you may create them in your user settings in **Documents** > **Field variables**.

  - **Adding field variables for tickets:** Enter as **Name** the desired name for the item in the field variable list.

    Enter as **Value** the key `TASK:Field`, where `Field` is the desired field's internal name. For example, `TASK:KEYWORD` refers to the ticket's subject.

  - **Adding field variables for linked data records:** Via field variables, you may also embed fields of unambiguously linked data records, such as customer and submitter in the following way: `Table:Field:Link type`

    You may, for example, refer to the customer's company like this: `ADDRESS:COMPNAME:L2UTicketPart`

  The internal field names are listed in the **Database** area of the Management Console.

  The internal link type names are listed in the Management Console under **Miscellaneous** > **Links** > **Link types**.

## Notes

> The field variables for ticket fields will only be correctly replaced in e-mail templates for tickets. Use the field variables for the primary job to embed ticket fields in word documents.

**Add attachments:** Click on the arrow button at the lower left to display the attachment list. Then click on the **Attachments** button next to that list to edit it.

- Click **Add attachment** to access the document archive via the global search.
- Click **Add new attachment** to create a new document and add it to the e-mail template as an attachment.
- Click **Remove attachment** to remove the selected attachment.

- **Data in the Advanced tab:** In e-mail campaign templates, nearly all fields that you usually edit in the **General** tab can be found in the **Advanced** tab.
- **Mark as e-mail template:** Switch to the **Advanced** tab and select the **Ticket e -mail template** category to add the document to the selection of e-mail templates.

# 5 Product use and service agreement management

The following sections describe features for product uses and service agreements:

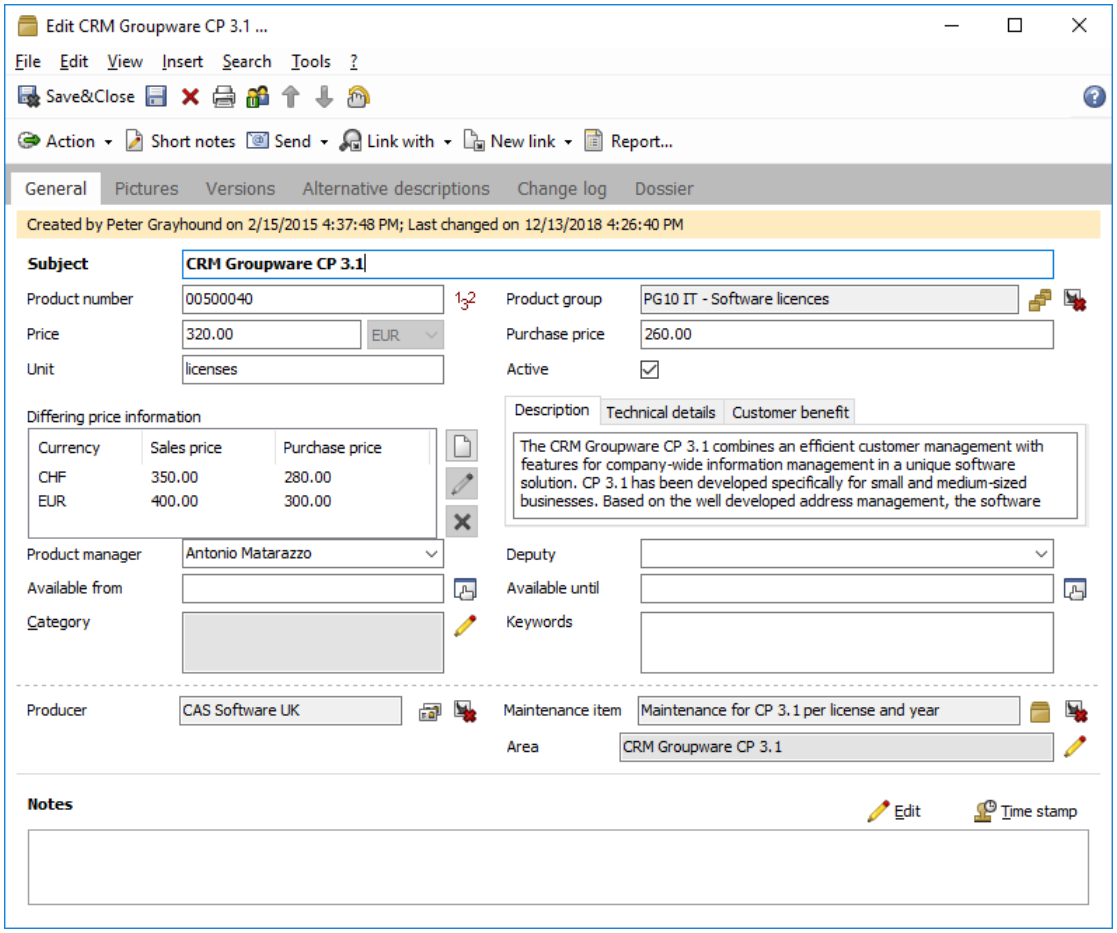


## 5.1 Products in the Desktop Client

The Helpdesk features for products are only available in the Desktop Client:



### 5.1.1 General



**Differing price information** entered in the **General** tab (prices in other currencies) will be available in product uses when the product and currency are selected there. You may enter differing prices here if this feature has been activated in the Management Console (see "11.3.6 Products" on page 186).

With Helpdesk, the following additional fields are also available here:

- **Producer:** If you specify a company as manufacturer here, it will be available in tickets linked with the product as a recipient for e-mails that you create from templates.
- **Maintenance item:** If you are a reseller of service agreements, specify the product representing the service agreement here. In the maintenance item, you specify the **Purchase price** for one year of service. The **Contribution margin** results from the difference between the purchase price and the maintenance amount for the serviced product (calculated on the basis of the product price and maintenance amount). Other information entered for the maintenance item will not be considered in the calculation.

  When you create maintenance bills with Easy Invoice using the example configuration, the line items for products will be described with the product's **Subject**. For products with a maintenance item, the maintenance item's **Subject** will be quoted in the bill instead (see "5.4.5 Maintenance billing with Easy Invoice" on page 72).
- **Area:** Here you can assign a feature area to each product.

  You can configure the hierarchic input help for this field in the **Database** area of the Management Console, under **Products**, for the **Area** field (see "11.1 Settings in the Database area" on page 147).

  The assignment is valid for the selected area and any of its sub-areas which haven't been assigned to a different product.

  When a feature area with a product assignment is entered in a ticket or FAQ item, the product will also be entered there automatically.

  Likewise, the selection of a product to which a feature area has been assigned will also automatically select the associated feature area.

  In Helpdesk online, for new requests and in the FAQ search, all first level areas and all sub-areas assigned to products will be available for selection as products.

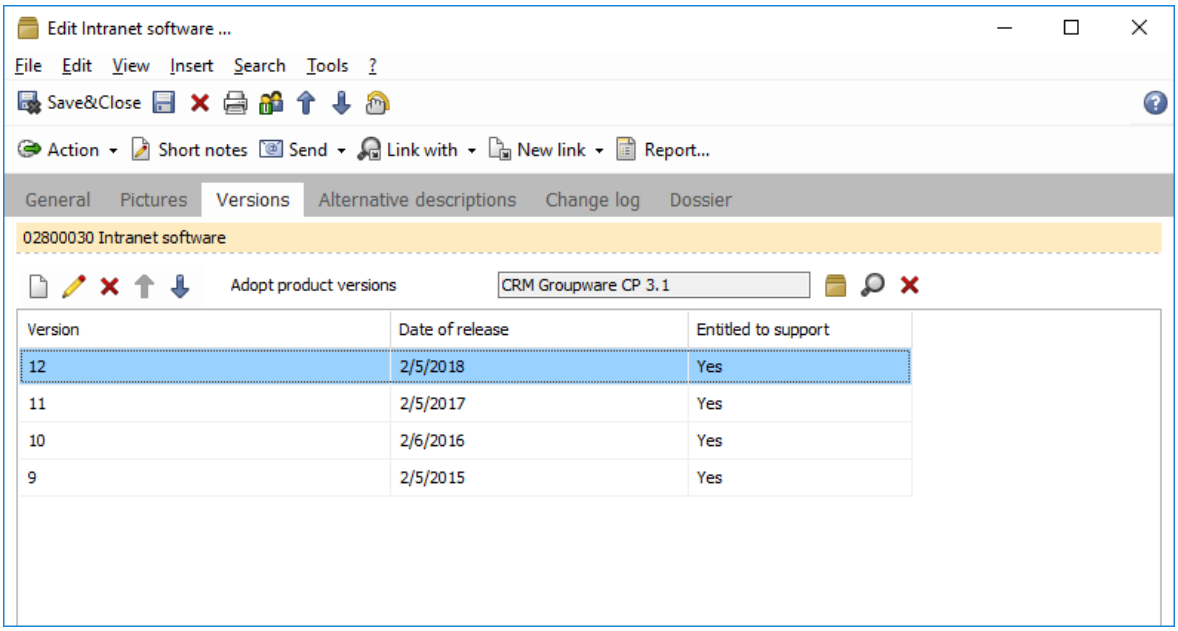
### 5.1.2 Version

In the **Version** tab, you may enter versions with a name or number and release date and specify whether the version is supported.

When a product is selected in a ticket, product use or faq document, the versions entered for that product will be available there.

## Note

> New versions, deletions and any changes made to the version list will only be applied when the product is saved. If you close the data record window without saving changes, the version list will be reset.
>
> This also holds for adopting versions from another product.




**Add new version:** Here you create a new version for the product.

- **Version name:** Enter the desired name for the version here.
- **Release date:** Specify the release date here.
- **Qualified for support:** Remove the check mark for unsupported versions. Such versions will be marked as **Not qualified for support** in the ticket's version list.

**Delete version:** Here you delete the selected version. Prior to deletion you will be prompted to confirm. After saving the product, the version will no longer be available in tickets and product uses. Data records in which the version has already been entered will retain the entry at first. When you open the data record in its window, the **Version** field will be reset. If you proceed to save the record, the version will be dropped.

**Sort list:** Use the arrow buttons to change the order of list items.

- **Adopt product versions:** If you wish to use an existing version list for the current product, specify here the product whose versions you wish to use.

  The selected product's versions will be displayed in the current product and may be modified here. Changes will directly affect the other product's version list.

  **Open product:** If a product was entered, you open its data record window here.

  **Search product:** Here you select a product in the **Search** window. Select the desired product in the list and enter it by clicking **Accept & Clos**e.

  - This feature is not available in products whose versions have already been adopted by other products.
  - Products that already adopt another product's versions will not be found.
  - If versions have already been entered, they will be deleted. In this case, you will be asked for confirmation before the version list is adopted.

  **Delete link:** Here you delete the link to the version list. Afterwards, you may record separate versions for the product.

## 5.2 Product uses, service agreements and maintenance billing

Product uses and service agreements are available in all tickets created for a customer. Maintenance fees are calculated on the basis of the product price and maintenance rate.

With Easy Invoice, you can create maintenance bills and transfer them to your ERP or financial accounting system.

- A **product use** assigns a **product** to a **customer** and states the applied **quantity** and **version**. You also specify whether the product was adapted for the customer.
  - In a ticket, the product and version are automatically entered when a product use is selected.
- **Service agreements** cover a customer's product uses.

  In the Management Console, you can activate response deadlines and submission permissions for contacts by priority. Both are recorded in the service agreement.
  - When you are using response deadlines, those are displayed in the ticket depending on its priority.
  - When you are using submission permissions, the selection of available priorities depends on the submitter.
- You may only create or change the special **links** between a service agreement and the associated product uses via the product use list in the service agreement or via the **Service agreement** link field in a product use.

  Via the **Link with** and **New link** features in the toolbar of the data record windows and lists for service agreements and product uses, you can only create general links. Product uses linked to a service agreement only via a general link will not be displayed in the list of associated product uses in the service agreement and will not be included in maintenance bills (see next section).

  This limitation preserves the consistency of the data for maintenance billing. Only if the data records are linked via the product use list in the service agreement or via the **Service agreement** link field in the product use it can be ascertained that the service agreement and all product uses have the same currency (see next section).
- **Maintenance billing** for service agreements is optional, as is the use of response deadlines and submission permissions.
  - The **maintenance amount** is calculated from the **maintenance rate** as a proportion of the **prices** of the products linked via product uses. You can enter default values for the maintenance rate for agreement types (**service level**) and **billing interval** in the Management Console. You can also specify a **discount** per agreement.
  - When you are **reselling** maintenance agreements, you can have the **contribution margin** calculated in the product use. To do this, enter the purchased service agreement as a product and assign it to the serviced product in the **General** tab via the **Maintenance item** link field (see "Maintenance item" on page 51).

In the maintenance item, you specify the **Purchase price** for one year of service. The difference between the maintenance amount for the product use and the maintenance item's purchase price yields the contribution margin.

- You may specify a different **maintenance rate**, **price**, **discount** and **contribution margin** per product use.
- You determine the **Currency** of a service agreement and any associated product uses in the **Maintenance** tab of the data record window for the service agreement. Product uses with a different currency are not possible.

  You can change the currency of a service agreement and associated product uses via the **Tools** menu of the service agreement if this feature has been activated in the **Miscellaneous** area of the Management Console unter **Products**. To do this, select the desired currency and, if desired, specify a conversion rate.

- With the **Easy Invoice** module, you can create **maintenance bills** and transfer them to your ERP or financial accounting system (see section "5.4.5 Maintenance billing with Easy Invoice" on page 72 of this manual and the Easy Invoice manual available in the CAS genesisWorld knowledge hub under https://hilfe.cas.de/index-en.html).

## 5.3 Product uses in the Desktop Client

In product uses, you record which customer utilizes which product in which quantity and version, and whether the product has been modified.

The following sections describe the features for product uses:



### 5.3.1 Views and features for product uses

The following standard features are available for product uses.

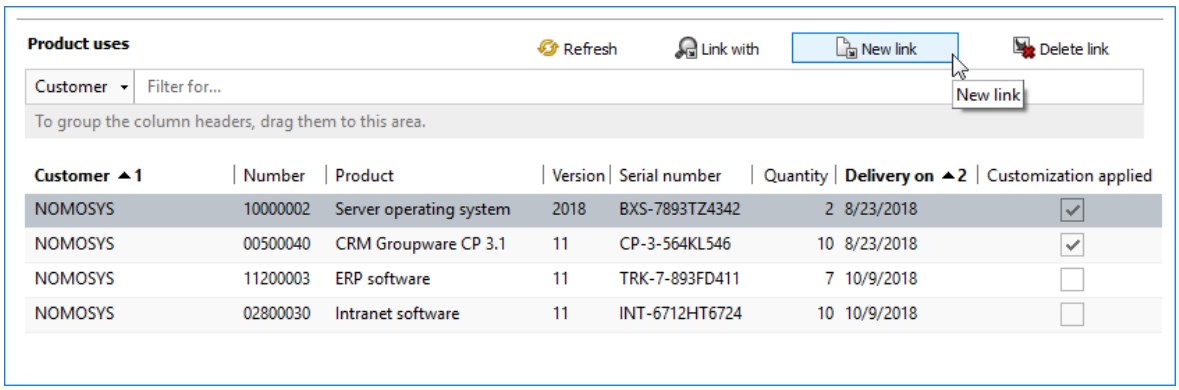
- **Data record window** with **General**, **Maintenance**, **Change log** and **Dossier** tabs.
  - **Currency** for maintenance billing, is copied from the service agreement.

    For service agreements with product uses, you can change or convert the currency via the **Tools** menu in the service agreement's data record window if this feature has been activated under **Miscellaneous** > **Products** in the Management Console.
  - **General links** to any other data records
- **Creation** in the **New** menu, in the toolbar of data record windows and list views as well as via the **Product uses** list in a service agreement
- **Global Search** in all fields such as **Customer**, **Product** and **Serial number**. Configurable via **Settings** > **Search**; search toolbar abbreviation **PU**
- **Views** in the program navigator (list, dossier) and in the link navigator (link list)

### 5.3.2 Creating a product use

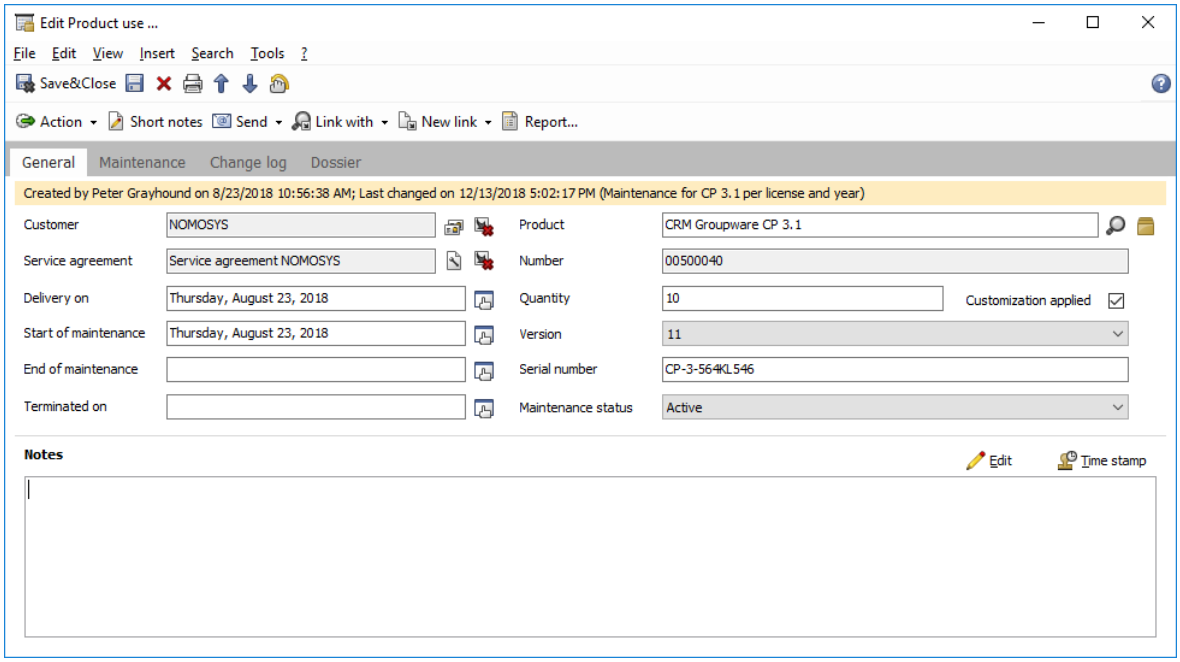
Proceed as follows to create a new product use.

- In the **New** menu, select the **Product use** item. Then enter the associated customer and, if applicable, the service agreement via the search.
- Via the **New link** menu, you can create a product use directly for a customer or service agreement. In the service agreement's data record window, you may also use the **New link** button above the **Product uses** list.




## 5.3.3 The data record window for product uses

In the **General** tab, you record the core data of the product use. In the **Maintenance** tab, you supply information for maintenance billing.




## General

**Customer:** Specify the customer here. When you create a product use for a service agreement or an address, the customer will be entered automatically.

**Search address:** Here you select the customer in the **Search** window.

**Open address:** Here you open the entered address.

- **Contact person as customers:** In the default setting, you may only enter companies and individual contacts as customers. Creating a product use for a contact person will enter the associated company as customer. You may change this to allow contact persons as customers (see "Customer and submitter" on page 150.)

**Service agreement:** Here you specify the service agreement for the product use. When you create a product use for a service agreement, it will be entered automatically. Once a product use has a currency, the service agreement's currency must match.

**Search service agreement:** Here you open the **Search** window for selection. Only service agreements with matching currency will be available for selection.

**Open service agreement:** Here you open the entered service agreement.

**Delivery on:** State here when the product was delivered to the customer.

**Start and end of maintenance:** In product uses for service agreements, you specify here from when to when the customer is entitled to support for the product.

A product use is active as long as it is already valid (**Start of maintenance <= "Today"**) and not yet expired (**End of maintenance > "Today"**).

If you leave one of the fields blank, the associated condition is also considered to be fulfilled. A product use in which both fields are blank is always active.

Only active product uses will be available in the ticket form as well as in Helpdesk online and will be considered in the calculation of the **Maintenance amount** and **Contribution margin** when the associated service agreement is updated. (see "Maintenance" on page 70.

Maintenance bills created with Easy Invoice will also only include active product uses (see "5.4.5 Maintenance billing with Easy Invoice" on page 72.)

**Terminated on:** If the customer has terminated the associated service agreement, specify the termination date here.

**Product:** Here you specify the used product.

## Note

Only products matching the associated filter will be found.

By default, these are all products for which the **Active** option has been selected in the **General** tab. You can change the associated filter condition in the Management Console under **Miscellaneous** > **Products** (see "11.3.6 Products" on page 186).

- **Quick search:** Enter all or a part of the subject or number of the product for which you are looking in the **Product** field. Use the "%" character as a placeholder. It is automatically added at the end of you search term. For example, you can look for a product whose number contains the digits "001" using the search term "%001". Confirm with the `[Return]` key. If your search term can be associated with exactly one product, that product is entered. If multiple products were found for the entered search term, you are prompted to select the desired product.

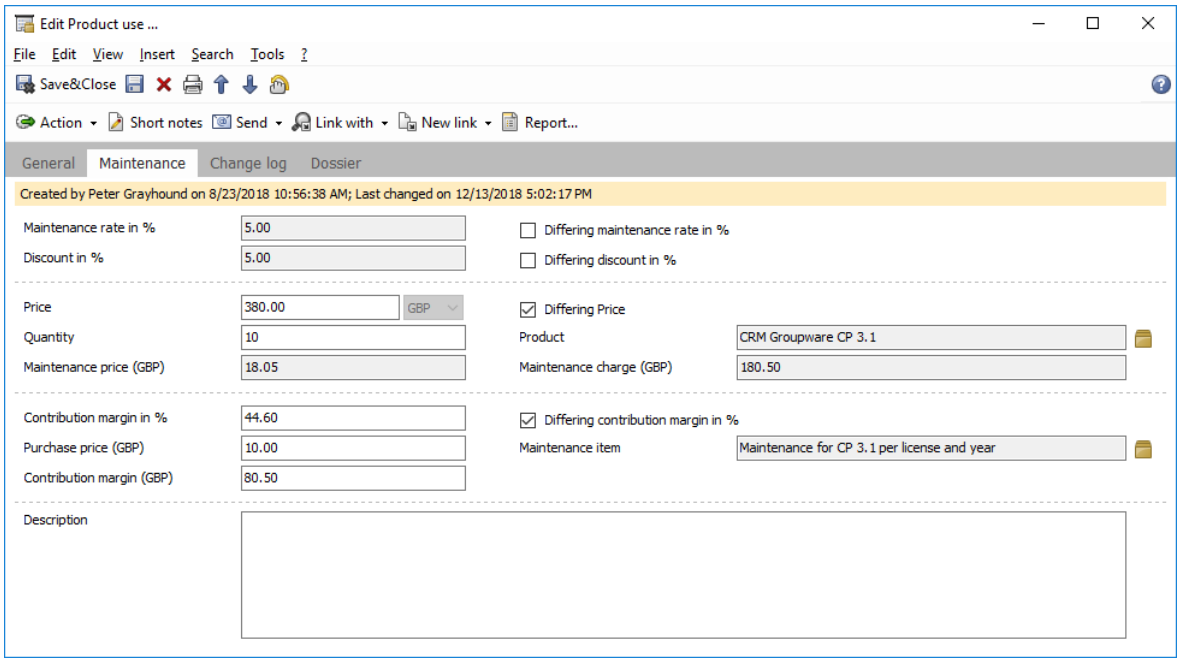
**Search product:** Here you select a product in the **Search** window.

**Open product:** If a product was entered, you open its data record window here.

- **Number:** When a product is entered, its product number will be entered here.
- **Quantity:** Here you specify the quantity of product units the customer utilizes.
- **Adaptation exists:** Here you specify whether the product was modified for the customer.
- **Version:** All versions recorded for the selected product are available here.
- **Serial number:** Where applicable, enter the product's serial number here. The serial number will be displayed along with the product description when selecting the product use in a request.
- **Maintenance status:** For product uses in service agreements, you specify here whether the customer is currently entitled to support for the product.

  The **Active** and **Cancelled** options are available as input help items.
- **Notes:** Here you record notes for the product use.

## Maintenance




- **Maintenance rate and discount**
  - **Maintenance rate in %** from the service agreement. Via **Differing mainentance rate in %** you may enter a different maintenance rate for this product use.
  - **Discount in %** from the service agreement. Via **Differing discount in %** you may enter a different discount for this product use.
- **Product and maintenance charge**
  - **Price** from the product, if a price in the service agreement's currency has been entered for it. Otherwise, no price is adopted. Via **Differing price** you may enter a different price for this product use.
  - **Currency** from the service agreement. All product uses for a service agreement share the same currency. Product uses with a different currency are not possible.

    You can change the currency of a service agreement and associated product uses via the **Tools** menu in the service agreement's data record window if this feature has been activated in the Management Console under **Miscellaneous** > **Products** (see "11.3.6 Products" on page 186).

    To do this, select the desired currency and, if desired, specify a conversion rate.
  - **Quantity** for the product use as specified in the **General** tab.
  - **Maintenance price:** Maintenance price per piece for the product, according to the **Price**, **Maintenance rate in %** and **Discount in %**.
  - **Product:** maintained product. You may open it here.
  - **Maintenance charge:** Sum of maintenance costs (**Quantity** * **Maintenance price**).

- **Contribution margin and maintenance item**
  - **Contribution margin in %:** the contribution margin's proportion of the maintenance charge.

    The contribution margin is the difference between the maintenance charge and the purchase price for maintenance, which can be entered per piece via a maintenance item. If no purchase price is specified via a maintenance item, the contribution margin amounts to 100%.

    Via **Differing contribution margin in %** you may specify a different contribution margin for this product use. You may then edit the **Contribution margin in %**, **Purchase price** and **Contribution margin** fields. If you edit any of these fields, the other two fields will be calculated based on the field you changed, potentially overwriting a purchase price entered via a maintenance item.
  - **Purchase price** from the maintenance item or calculated purchase price if a **Different contribution margin in %** has been entered. In this case, the purchase price will be calculated by dividing the **Contribution margin** by the **Quantity**.
  - **Contribution margin:** Contribution proportion of the **Maintenance charge**, whose amount corresponds to the **Contribution margin in %** (e.g., **Contribution margin in %** = 40, **Maintenance charge** = 200, yields a **Contribution margin** of 80).
  - **Maintenance item:** When you are reselling service agreements, you can record the purchased service agreement as maintenance item of the serviced product to calculate the contribution margin (see "Maintenance item" on page 51).

    If a maintenance item has been entered and is displayed here, you may open it here.
- **Description:** Enter a text for maintenance billing here.

### 5.3.4 Automatic update of the service agreement

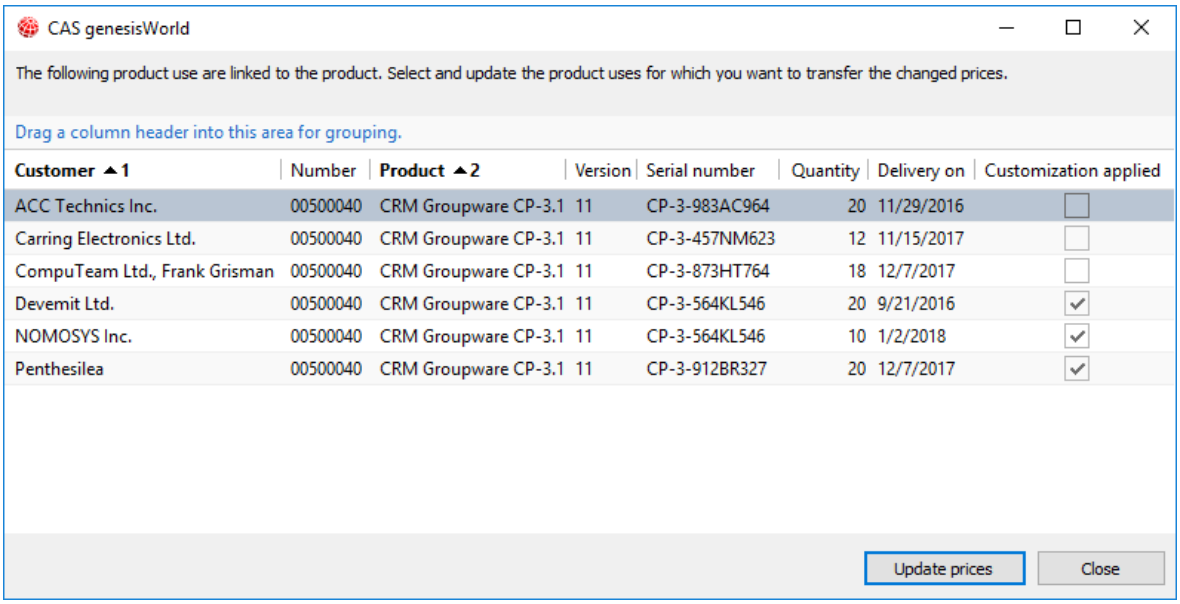
When you save a product use, the **Maintenance charge** and **Contribution margin** fields of the associated service agreement will be updated automatically in the following cases:

- **Maintenance charge** or **Contribution margin** of the product use have changed (e.g., due to a change of the maintenance rate, discount, price, quantity or contribution margin in the product use).
- The service agreement of the product use was changed via the associated link field in the **General** tab. In this case, the previous and the new service agreement of the product use will be updated when the product use is saved.

### 5.3.5 Updating prices

When you save a product for which product uses exist after changing the price, or when you change the purchase price in the associated maintenance item, a list of the associated product uses will be displayed.

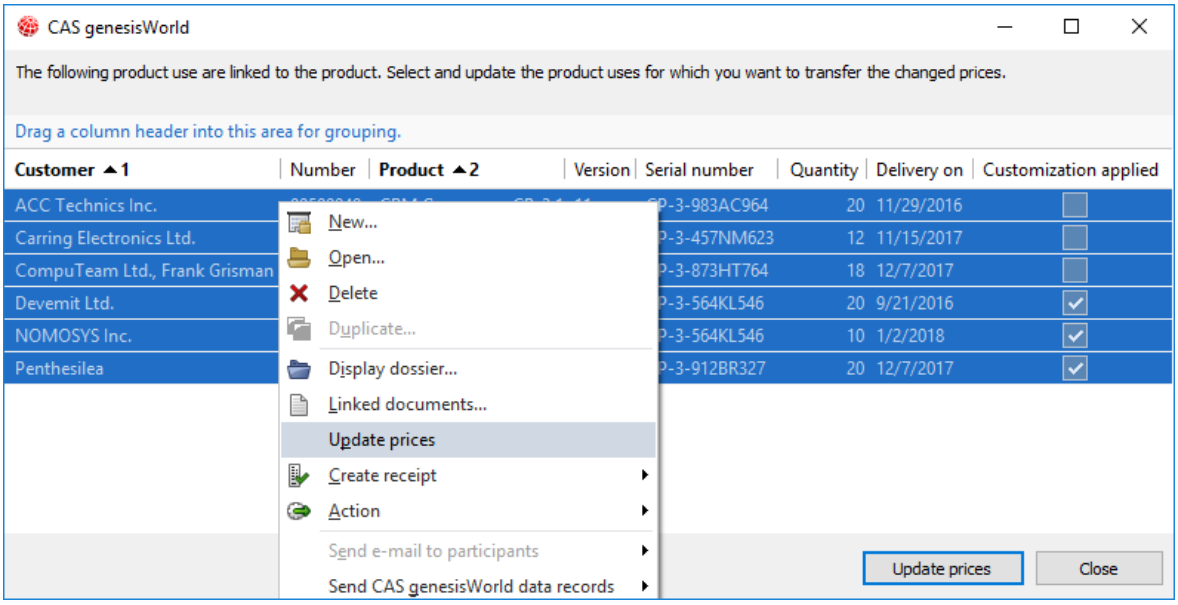
The list will only display such product uses for which the changed price or purchase price wasn't overwritten via the **Differing price** or **Differing contribution margin in %** option.




The product uses will not be updated automatically.

To update the displayed product uses, select them and click on the **Update prices** button.

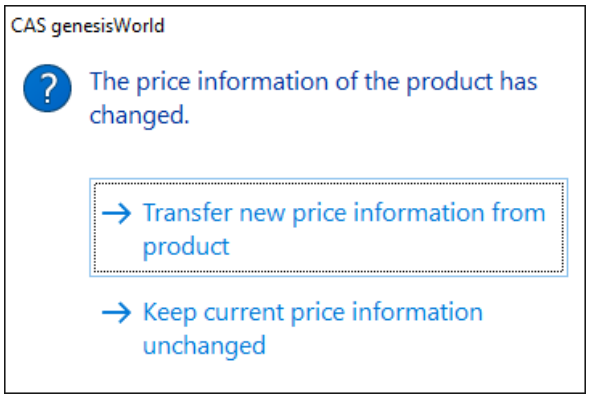
Alternatively, you may select the product uses to update, right-click to open the context menu and select its **Update prices** option.




This option is always available in the context menu for product uses.

### 5.3.6 Automatically applying a changed product price

If you open the **Maintenance** tab of a product use belonging to a service agreement after the price of the associated product or the purchase price of the associated maintenance item has been changed, when the prices of the product use have not yet been updated via the **Update prices** option and have not been overwritten via the **Differing price** or **Differing contribution margin in %** option, you will be asked whether the new price should be applied.




If you select the **Keep current price information unchanged** option for the product price, the **Differing price** option will automatically be selected in the product use.

If you select the **Keep current price information unchanged** option for the purchase price of the maintenance item, the **Differing contribution margin in %** option will automatically be selected in the product use.

## 5.4 Service agreements in the Desktop Client

In service agreements, you record products utilized by the customer as well as the associated agreements for response times, availability and contact persons.

The following sections describe the features for service agreements:



### 5.4.1 Views and features for service agreements

The following standard features are available for service agreements.

- **Data record window** with **General**, **Response time**, **Contact persons**, **Maintenance**, **Change log** and **Dossier** tabs
  - **Currency** for maintenance billing, is copied to associated product uses.

    For service agreements with product uses, you can change or convert the currency via the **Tools** menu in the service agreement's data record window if this feature has been activated under **Miscellaneous** > **Products** in the Management Console.
  - **General links** to any other data records
- **Creation** in the **New** menu and in the toolbar of data record windows and list views
- **Global Search** in all fields such as **Subject**, **Customer** and **Number**. Configurable via **Settings** > **Search**; search toolbar abbreviation **SA**
- **Views** in the program navigator (list, dossier) and in the link navigator (link list)

### 5.4.2 Creating a service agreement

Proceed as follows to create a new service agreement.

- In the **New** menu, select the **Service agreement** item. Then enter the associated customer and, if applicable, other contacts.
- Via the **New link** menu, you can create a service agreement directly for an address. When you do, you will be prompted to select the desired link type, e.g., **Customer**.

  To save a service agreement, you need to specify a customer. You may enter other contacts in the service agreeement's data record window.

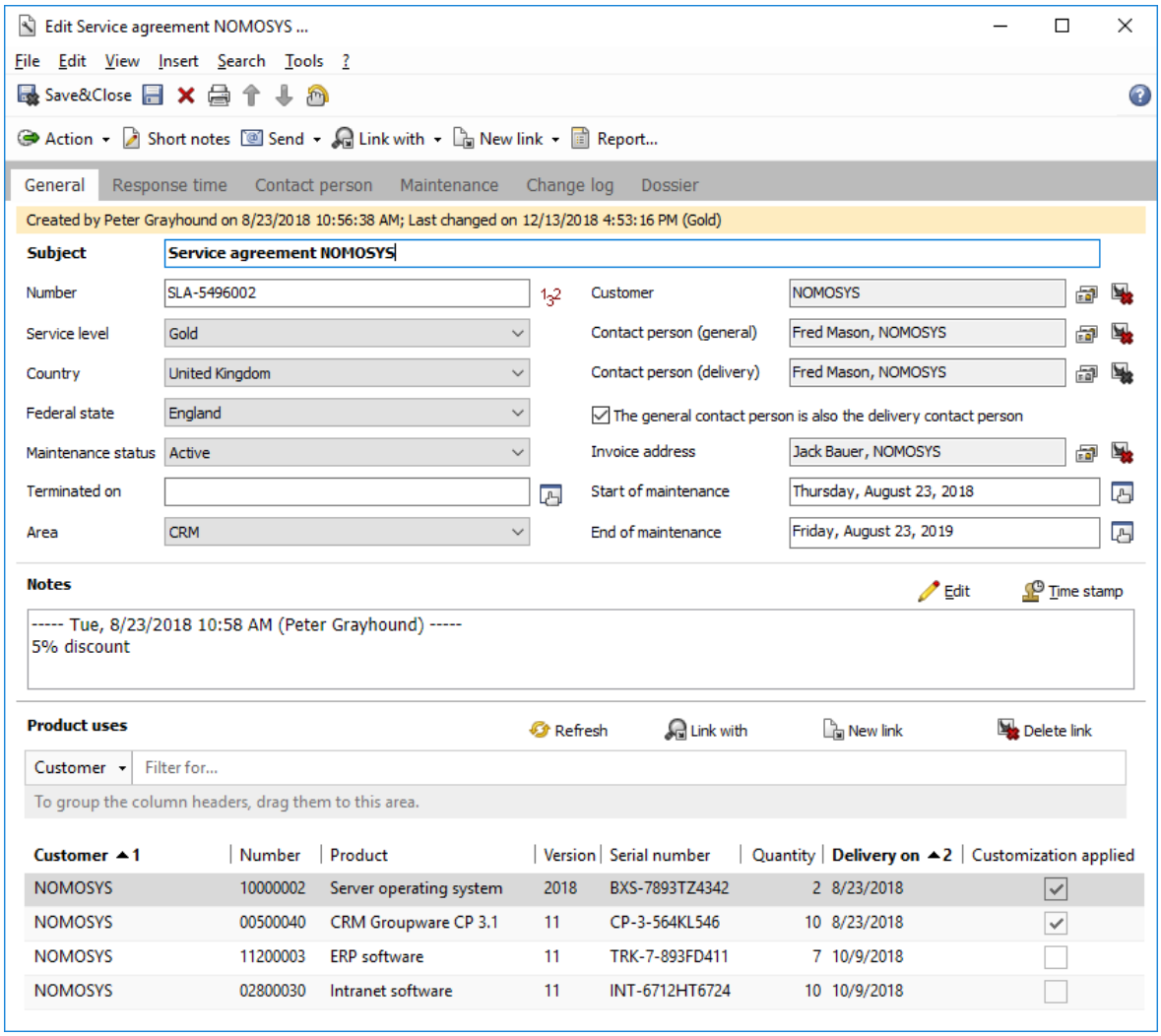
## 5.4.3 The data record window for service agreements

In the **General** tab, you record core data for the service agreement. The **Response time** and **Contact persons** tabs are for recording agreements concerning tickets. Information for maintenance billing goes to the **Maintenance** tab.

### Note

> The **Response time** and **Contact persons** tabs as well as the **Product uses** list are only displayed after you have saved the service agreement. In addition, the tabs are only displayed if the associated features are switched on (see "Use service agreements, response deadlines and submission permissions" on page 152.)

### General




- **Subject:** Specify here a subject to display in lists and for searching.

1 3 2 **Number:** Here you generate the next free number. You enter numbering settings jin the Management Console under **Miscellaneous** > **Numbering**.

- **Service level:** Here you record the type of agreement. The options **Gold**, **Silver** and **Platinum** are available via an input help. You may store presettings for response deadlines and hotline hours by service level in the Management Console under **Helpdesk** > **Service agreements** (see "11.2.4 Service agreements" on page 174.)
- **Country and federal state:** Specify here the country and federal state in which the service agreement is valid. You may see and modify the presettings for those two fields in the Management Console under **Helpdesk** > **Service agreements**.

  In tickets, the country and federal state are used to determine the public holidays to be accounted for in the calculation of the response deadline.

  You can add other countries by importing holidays as .hol files in the Management Console under **Miscellaneous** > **Activities** > **Calendar** (see "11.3.1 Activities (holidays for service agreements)" on page 180).
- **Status:** Here you specify whether the service agreement is currently valid. The options **Active** and **Cancelled** are available as input help items.

**Terminated on:** For terminated service agreements, enter the termination date here.

- **Area:** Here you distinguish service agreements for different business areas.

**Customer:** Specify the customer here. When you create a service agreement for an address, the customer will be entered automatically. You need to enter a customer to save the service agreement.

**Search address:** Here you select the customer in the **Search** window. If product uses have been entered, you will be asked whether the new customer should also be updated in the product uses.

**Open address:** Here you open the entered address.

- **Contact person as customers:** By default, only companies and individual contacts may be entered as customers. Creating a service agreement for a contact person, will enter the associated company instead. In the Management Console, you may enable contact persons as customers (see "Customer and submitter" on page 150.)

**Contact person (general / delivery):** Here you may specify customer contacts.

**Search address:** Here you select the contact person in the **Search** window.

**Open address:** Here you open the entered address.

- **Identical contact person for delivery:** Select this option to have the general contact person double as delivery contact person.

**Billing address:** Specify here the recipient of maintenance bills.

**Search address:** Here you select the billing address in the **Search** window.

**Open address:** Here you open the entered address.

**Start and end of maintenance:** Here you record the agreement's validity period.

If you don't enter your own filter for service agreements in the Management Console under **Helpdesk** > **General**, a default filter by these two fields applies to tickets created in Helpdesk online (see "**Filter for service agreements**" on page 152). No default filter applies to tickets created in the CAS genesisWorld Desktop or Web clients.

- **Notes:** Here you record notes for the service agreement.
- **Product uses:** The **Product uses** list will be displayed after saving. Here you can see all product uses for the service agreement. They will be displayed in the ticket and accounted for in maintenance billing.

  **Refresh:** Here you refresh the list to apply changes made to the product uses.

  **Link with:** Here you select product uses in the **Search** window. Only product uses with matching currency will be available for selection.

  **New link:** Here you create a new product use for the service agreement.

  **Remove link:** Here you remove the selected product uses from the service agreement. The product uses will not be deleted by this.

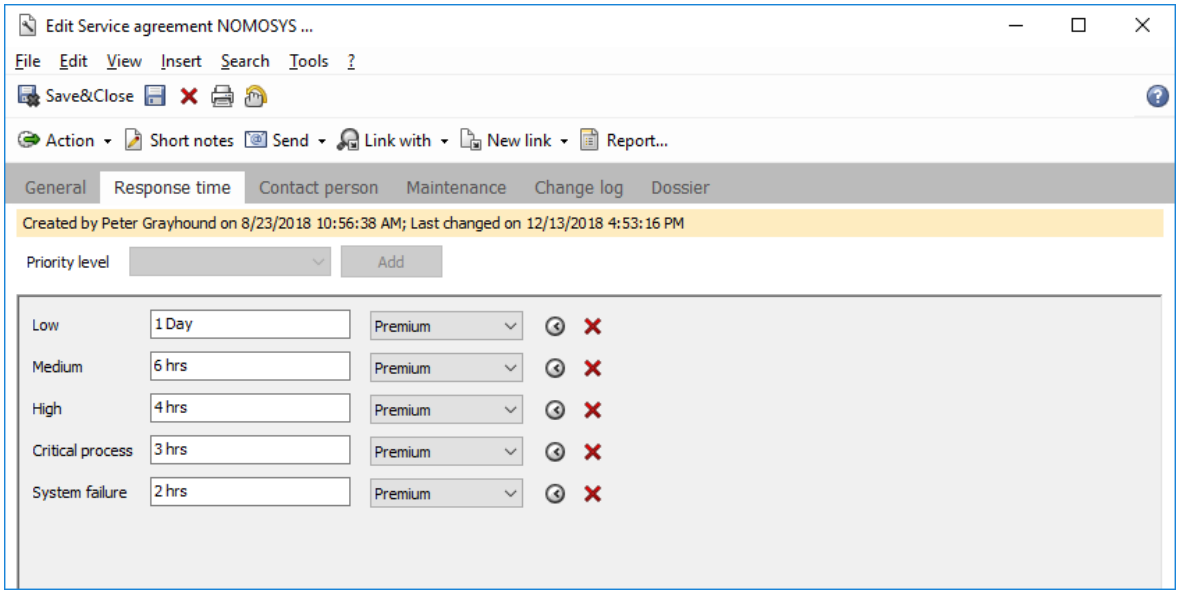
## Response time

In the service agreement's **Response time** tab, you clear priority levels and enter agreed response times and hotline hours for each level.

You may edit the available priority levels via the input help for the job's **Priority** field in the **Database** module of the Management Console.

The priority levels and associated settings can be preselected for new service agreements depending on the **Service level** in the Management Console under **Helpdesk** > **Service agreements**. There you also enter other presettings and clear priority levels for requests without a service agreement (see "11.2.4 Service agreements" on page 174).

When a service agreement is selected in a request, only priority levels that have been cleared in the service agreement will be available for selection.



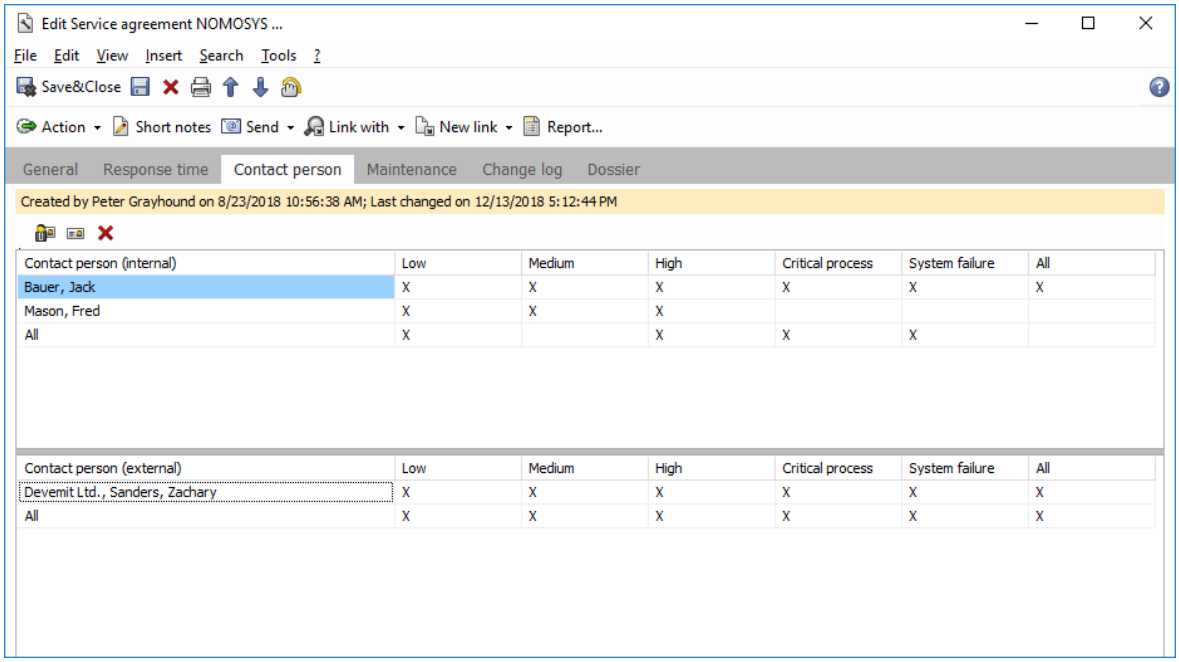

- You clear a priority level and enter a response time and hotline hours for it as follows:
  - ✓ Select the desired **Priority level** in the associated menu.
  - ✓ Click **Add**.
  - ✓ Enter the maximum response time.
  - ✓ Select the associated hotline hours.

**Display hotline hours:** Here you display the selected hotline hours.

**Remove priority level:** Here you remove the priority level from the selection. It will no longer be available in a request when this service agreement is selected. You may clear the priority level again at a later time.

## Contact persons

In the **Contact persons** tab, you specify which contact person has submission permissions for which priority levels. Once you have selected at least one contqact here, only selected contacts are permitted to submit requests. The service agreement will then only be available for selection for requests in which one of the contacts selected here has been entered as submitter.




**Select contact persons from linked company:** Here you select contact persons of the customer company to give them submission permissions.

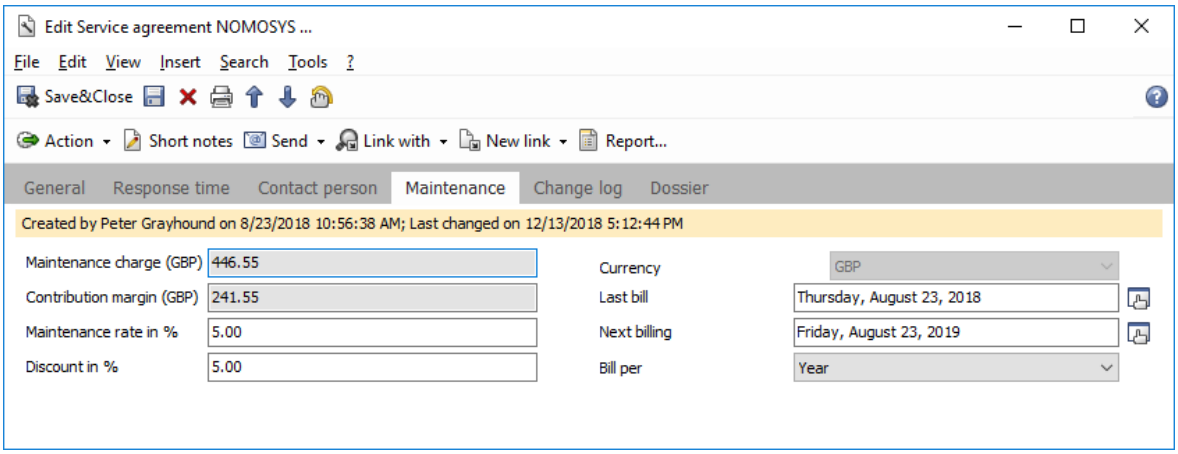
**Select any contact person:** Here you select contact persons of other companies to give them submission permissions.

**Remove contact person from list:** Here you remove contact persons you have already selected. Clicking on the button opens the **Remove contact person from list** window, in which you select the contact persons to remove.

- **Give contact persons submission permissions:** Enter the desired submission permissions via the table.

  By clicking a field in the **All** row or column, all associated fields will be selected automatically. Please note that this only affects explicitly selected contacts and doesn't entail submission permissions for contacts that have not been selected or priority levels added at a later time.

## Maintenance




- **Maintenance charge and contribution margin:** If product uses exist, these fields are calculated based on all active product uses linked to the service agreement and the associated products (see "**Start and end of maintenance**" on page 58). You can find details about the calculation of the maintenance charge and contribution margin for a product use under "Maintenance" on page 60.

  When the automatic calculation is active and the user has writing permissions for the service agreement as well as service level reading permissions for product uses and products, the two fields are updated automatically with the data of the associated product uses when the **Maintenance** tab is first opened and when the service agreement is saved.

  After changing the service agreement links of product uses, any affected service agreements will be updated when one of them is saved.

  You may also have the fields recalculated by selecting the **Update service agreements** option from the context menu of the the service agreement list. Only product uses and products for which you have reading permissions will be considered and only active product uses will be included.

  If no product uses exist or the automatic calculation has been deactivated, the two fields may be edited freely. You may activate or deactivate the automatic calculation in the Management Console under **Helpdesk** > **Service agreements**.

  - **Maintenance charge:** The maintenance fee billable per year, quarter or month. When product uses exist, this fee is calculated from the maintenance rate, the prices of products assigned via active product uses as well as the discount, if specified.
  - **Contribution margin:** When reselling service agreements, enter the purchase price of the service agreement for a product via a maintenance product. The contribution margin is automatically calculated for all active product uses from the purchase prices of the maintenance products entered for billed products and displayed here.

- **Maintenance rate in %:** The Maintenance rate may be preallocated depending on the billing period and service level.

  If the **Maintenance rate in %** field is empty, when you select a service level in the **General** tab and a billing period in the **Maintenance** tab, the associated mainenance rate will be entered automatically. Determine the preallocations in the Management Console under **Helpdesk** > **Service agreements** > **Default by service level**.

  Changes of the maintenance rate will be applied to all associated product uses for which no differing maintenance rate has been specified.

- **Discount in %:** If applicable, enter an agreed discount here.

  Changes of the discount will be applied to all associated product uses for which no differing discount has been specified.

- **Currency:** Here you select the currency of the service agreement as long as it doesn't have linked product uses. The selected currency will automatically be inherited by any product uses created for the service agreement. Product uses with a different currency are not possible.

  For service agreements with product uses, you can change the currency of the service agreement and associated product uses via the **Tools** menu in the service agreement's data record window if this feature has been activated in the Management Console under **Miscellaneous** > **Products** (see "11.3.6 Products" on page 186).

  To do this, select the desired currency and, if desired, specify a conversion rate.

- **Last bill:** When the service agreement is billed via the service agreement list, the current date is automatically set to be the date of last billing.

- **Next billing:** The next billing date is calculated from the last billing date and the billing period when the service agreement is billed.

- **Bill per:** Select the billing period **Month**, **Quarter** or **Year**. It serves for calculating the **Next billing** date. You can use it for automatic notification about due bills.

### 5.4.4 Update service agreements

Via the context menu for the service agreement list, you can have the maintenance amount and contribution margin recalculated:

- **Update service agreements:** Select this to recalculate the **Maintenance charge** and **Contribution margin** fields for all selected service agreements.

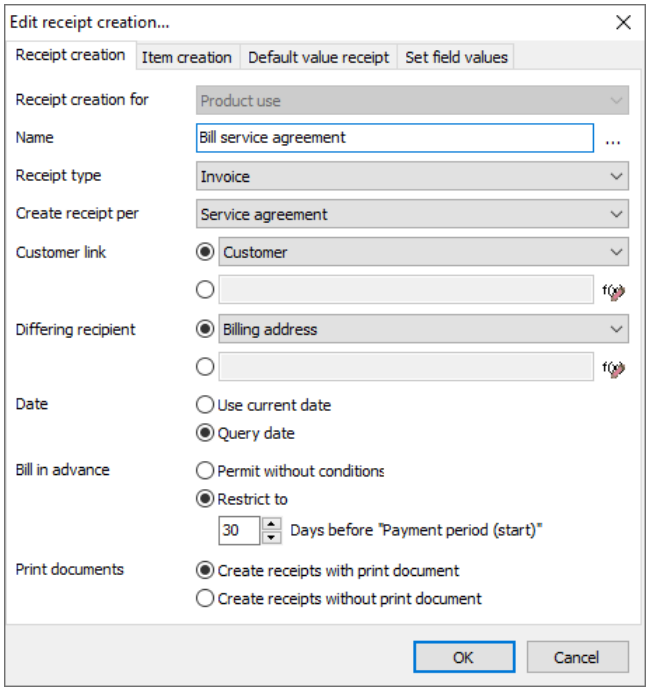
## 5.4.5 Maintenance billing with Easy Invoice

With Easy Invoice, a freely configurable billing of service agreements is available.

### Configuration

You can configure the maintenance billing under **Extended receipt creation** in the **Easy Invoice** area of the Management Console. Click **New** to create a new configuration and enter the following settings:

- In the **Receipt creation** tab, select the data records to bill, receipt type, links for the customer and invoice recipient as well as settings for the date and print documents:




✓ Select **Product uses** as data records to bill.

✓ Under **Name**, name the menu option for billing. Via the associated button, you can enter translations for other languages.

✓ Select the desired **Receipt type**.

✓ Under **Create receipt per**, select whether to create an invoice per receipt recipient, product use or service agreement. This selection affects the following other settings:

- The selection of address links for the receipt (**Customer** and **Differing recipient**).
- The selection of fields in formulas for receipt fields under **Default value receipt**.
- The selection of fields to set for the data records to bill under **Set field values**.

- ✓ Under **Customer link**, select the desired customer link or determine it via a formula.

  Depending on your selection under **Create receipt per**, you have access to address links of the billable product use (create receipt per receipt recipient or product use) or of the billable service agreement (create receipt per service agreement) in the drop-down menu and in the formula.

- ✓ Under **Conflicting recipient**, select the desired link for a differing recipient or determine it via a formula.

  With the default setting, **Customer address invoice recipient**, the address that has been assigned to the selected **Customer link** address as **Invoice recipient**, if that link has been set, will be linked with the receipt as **Differing recipient**.

  Depending on your selection under **Create receipt per**, you have access to address links of the receipt recipient (create receipt per receipt recipient), of the product use (create receipt per product use) or of the the service agreement (create receipt per service agreement) in the drop-down menu and in the formula.

- ✓ Under **Date**, determine whether the current date or a user entered date should be entered as receipt date.

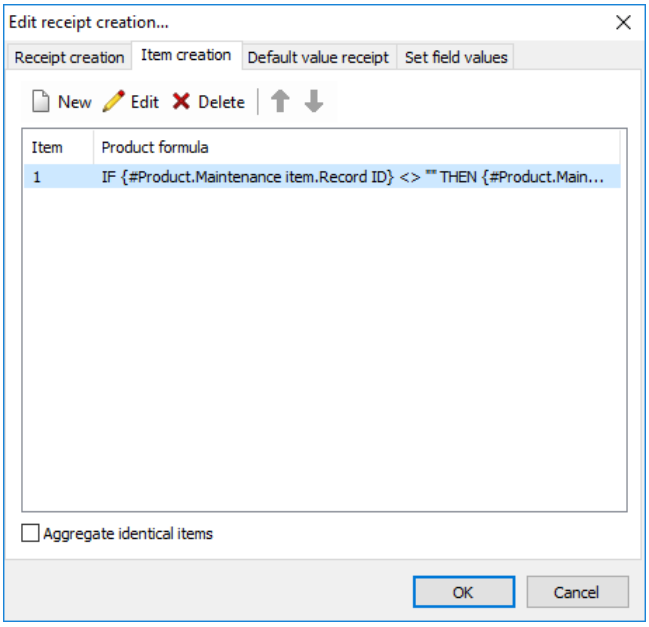
- ✓ Under **Bill in advance**, specify whether and how many days ahead billing should be possible without asking for confirmation. With this setting, a warning is displayed when trying to bill a service agreement at an earlier time. The service agreement can still be billed in this case.

- ✓ Under **Print documents**, specify whether print documents should be created right away. Otherwise, a print preview is initially available for each receipt.

  You can then create the print documents via the associated button in the data record window for a receipt or via the context menu for receipt lists.

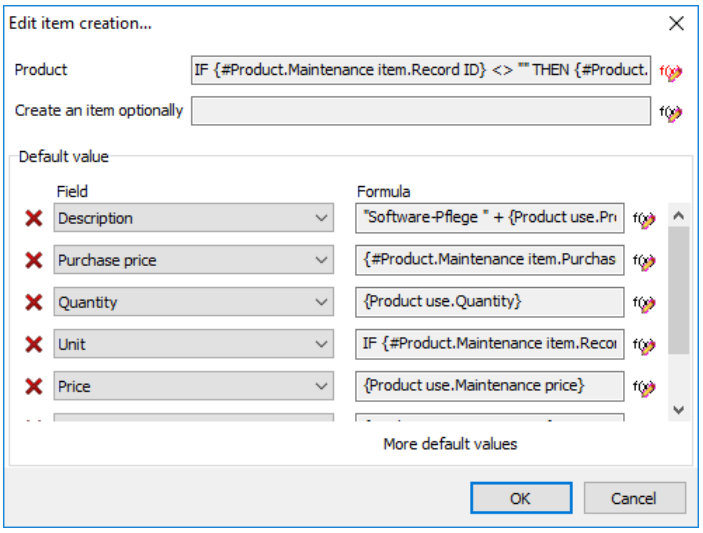
  After all receipts have been created, they will be displayed in a result list. You can immediately create the print documents here via the associated context menu.

✓ In the **Item creation** tab, you configure the creation of receipt items for the product uses to bill.




Per product use, you may create any number of receipt items.

With the **Aggregate identical items** option, all receipt items for the same product will be combined to one common item automatically. This setting will affect items created for the same product use as well as items created for different product uses.




Specify a product for each receipt item to create.

Enter a formula for the product to bill that returns one of the **Record ID** or **Product number** fields of the product.

Via **Create an item optionally**, you can enter a condition for creating this receipt item as a formula. In this case, the item will only be created when the condition is satisfied.

Under **Default value**, you can preconfigure other fields of the receipt item.

To this end, you have access to fields of the product use, the maintained product, the maintenance item, the associated service agreement and addresses as well as other linked data records.

If users are prompted to enter a receipt date, it is available as a variable under **User input**. Variables for international input help items are available under **Values from input help options**. You can use these to include input help items in your formulas regardless of the user language.

You can use the **AddInterval** date function to specify the paymend period depending on the receipt date and the service agreement's billing interval (**Bill per** field).

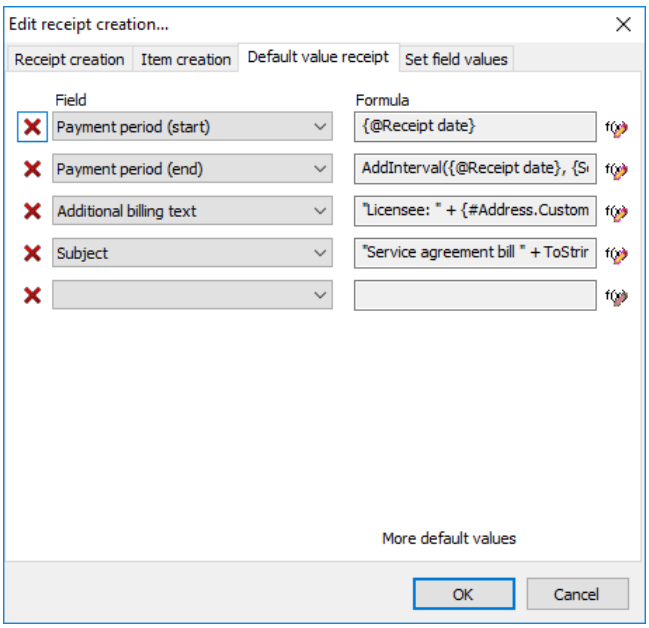
Please note that the accepted intervals of the **AddInterval** function are limited to **Month**, **Quarter**, **Half year**, **Year** and associated translations.

The strings accepted in a client language are displayed in the formula editor in the hint for this function when running the client in that language.

By default, the **Bill per** field of service agreements comes with the **Month**, **Quarter**, and **Year** values and corresponding translations for all installed languages.

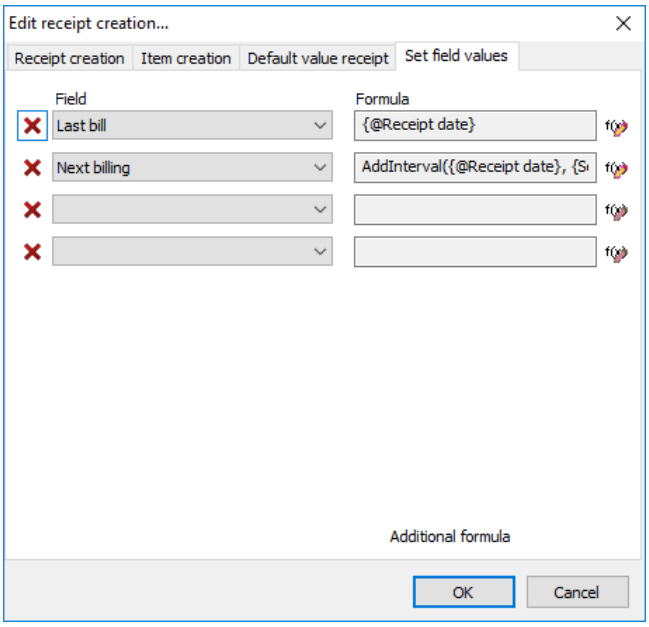
You can find an example configuration for billing the period entered in a service agreement in the "Example configuration" section on page 77.

- In the **Default value receipt** tab, you can preconfigure field values for the receipts to create via formulas.




Depending on your selection for the **Create receipt per** setting, you have access to fields and links of the customer address (create receipt per receipt recipient), the product use (create receipt per product use) or the service agreement (create receipt per service agreement).

- In the **Set field values** tab, you can change product use fields or, when receipts are to be created per service agreement, service agreement fields. By default, this serves for setting the **Last bill** and **Next billing** fields.




Depending on your selection for the **Create receipt per** setting, you have access to fields and links of the product use to bill (create receipt per receipt recipient or per product use) or of the service agreement (create receipt per service agreement).

When you are creating one receipt per service agreement, you can use the **AddInterval** date function once more for entering the next billing date based on the receipt date and the service agreement's **Bill per** field (e.g., one year after the receipt date).

Please note that the accepted intervals of the **AddInterval** function are limited to **Month**, **Quarter**, **Half year**, **Year** and associated translations.

The strings accepted in a client language are displayed in the formula editor in the hint for this function when running the client in that language.

By default, the **Bill per** field of service agreements comes with the **Month**, **Quarter**, and **Year** values and corresponding translations for all installed languages.

## Example configuration for billing per service agreement

The following configuration supports billing the period entered in a service agreement and setting the service agreement's **Next billing** field based on the receipt date entered by the user and the service agreement's billing period.

| **Item creation** | **Formula** |
|---|---|
| Product | IF {#Product.Maintenance item.Record ID} <> "" THEN {#Product.Maintenance item.Record ID} ELSE {#Product.Product.Record ID} |
| Description | "Maintenance for " + {Product use.Product} + "\n" + ToString(Round({Product use.Maintenance rate in %},2)) + "% / " + {#Service agreement.Service agreement.Bill per} + " of " + ToCurrencyString({Product use.Price}) + " " + IF {Product use.Currency} = "EUR" THEN "€" ELSE {Product use.Currency} |
| Discount relative (%) | {Product use.Discount in %} |
| Price | {Product use.Maintenance price} |
| Purchase price | {#Product.Maintenance item.Purchase price} |
| Quantity | {Product use.Quantity} |
| Unit | IF {#Product.Maintenance item.Record ID} <> "" THEN {#Product.Maintenance item.Unit} ELSE {#Product.Product.Unit} |

| **Default value receipt** | **Formula** |
|---|---|
| Additional billing text | "Licensee: " + {#Address.Customer.Company} + "\n\n"<br>+ "Dear Sir or Madam,\n\n" + "for the software service agreement " + {Service agreement.Service level} + " with the number " + {Service agreement.Number} +<br>", we would like to charge the following for the period from " + ToString({@Receipt date}) + " to " + ToString(AddInterval({@Receipt date}, {Service agreement.Bill per}) - 1) + ":" |
| Paymend period (start) | {@Receipt date} |
| Paymend period (end) | AddInterval({@Receipt date}, {Service agreement.Bill per}) - 1 |
| Subject | "Maintenance bill " + ToString({@Receipt date}) + "-" + ToString(AddInterval({@Receipt date}, {Service agreement.Bill per}) - 1) + " for " + {#Address.Customer.Company} |

| Set field values | Formula |
|---|---|
| Last bill | {@Receipt date} |
| Next billing | AddInterval({@Receipt date}, {Service agreement.Bill per}) |

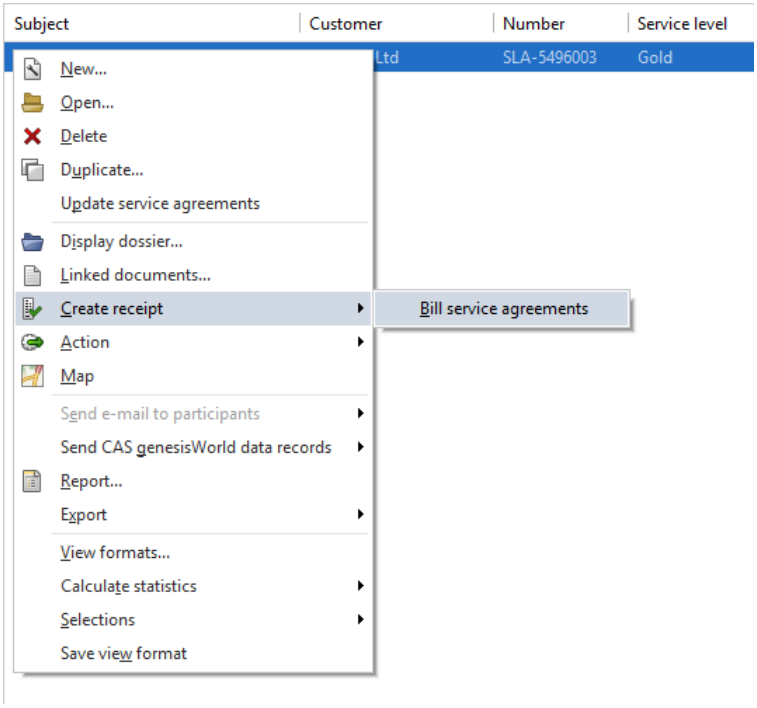
## Billing service agreements

As soon as a configuration for billing service agreements has been entered, every use who has been assigned an Easy Invoice license may bill service agreements or associated product uses via the context menu of the respective list.

With a configuration entered for product uses, the associated option will be available in the **Create receipt** sub-menu of the context menu for the product use and service agreement list.

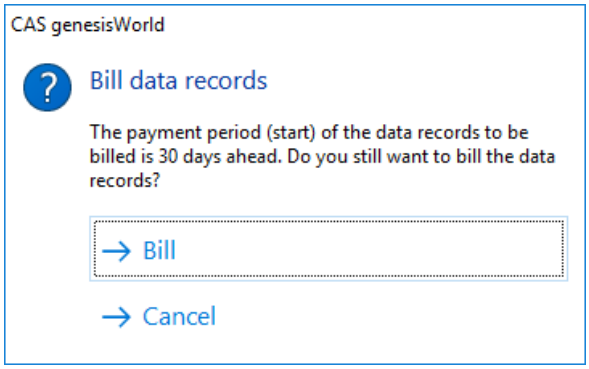
When a service agreement is billed, all associated product uses will be considered.

Updating the service agreement before billing is not required.




## Selecting a date

Depending on your settings, the current date is entered or you will be prompted to enter the desired receipt date. When creating multiple receipts, the current or selected date will be entered for all receipts that are created. When a maximum of days before the start of the payment period has been configured, before which no receipts may be created, and the start of the payment period is farther in the future, a warning will be displayed. Billing will still be possible.




## Result list

After billing, a window with multiple tabs will be displayed.

Depending on whether billing was successful, not all tabs will always be present.

- Unbilled service agreements
- Billed service agreements
- Unbilled product uses
- Product uses with invalid maintenance period (see note below)
- Billed product uses
- Receipts
- Print documents
- Receipts without a print document (the receipt was created without a print document or the creation of the print document failed due to lack of working memory. This can occur when processing a very large number of data records. Via the context menu for the receipt list, you may immediately create print documents for selected receipts.)

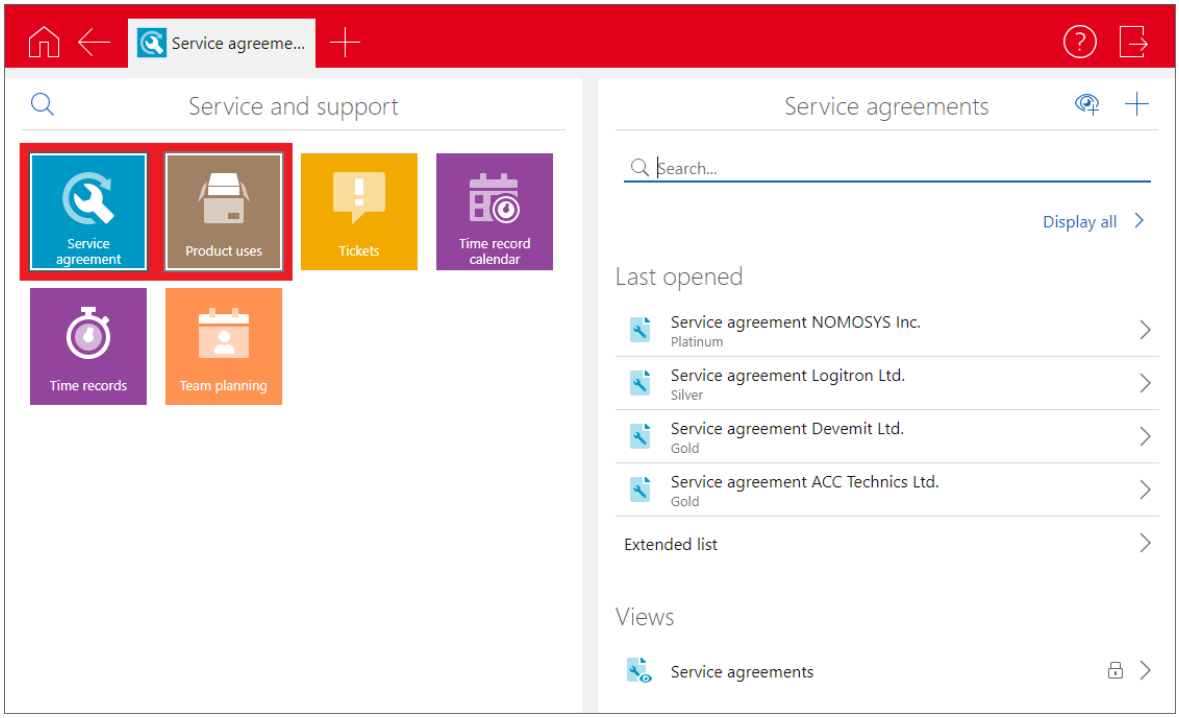
Under **Unbilled service agreements** and **Unbilled product uses**, the reason why the records couldn't be billed are displayed when selecting an item:

## Note

> Please note that the maintenance start and maintenance end of service agreements are never checked and the maintenance start and maintenance end of product uses are only checked if you start billing via the context menu for service agreements.

## 5.5 Product uses and service agreements in the Web Client

With the **Service agreements** and **Product uses** apps in the **Service and support** app group, you can see and edit existing service agreements and product uses as well as create new service agreements and product uses.




- In the app start for the **Service agreements** or **Product uses** app, you have access to your service agreements or product uses as well as associated views.
- Click on the eye icon to create a new service agreement or product use list view.
- Click on a service agreement or product use to open the detail view. You can also edit or delete the service agreement or product use here.
- Click on the plus [+] icon to create a new service agreement or product use.
- Alternatively, you can create linked service agreements and product uses in the detail view of a contact or service agreement.
  - Service agreement for contact: [...] > **Create** > **Service agreement**
  - Product use for contact: **Link with** > **Product use** > [+]
  - Product use for service agreement: [+] above the **Linked product uses** list
- Please note that maintenance billing details will be displayed as read-only in the Web Client, and only if they have been calculated and saved in the Desktop Client.

  You can't calculate or update maintenance billing data in the Web Client.

Click on the question mark at the top right to open the online help pages for more details.

# 6 Time records and reports

The following sections describe the features for time records and the associated reports:



## 6.1 Time records in the Desktop Client

The following sections describe the features for time records:



### 6.1.1 Views and features for time records

The following standard features are available for time records.

- **Data record window** with **General**, **Tree**, **Change log** and **Dossier** tabs
  - **Type** for categorization
  - **Status** for billing and approval processes
  - **Primary links** to address, project and job, displayed in the tree view and in analyses
  - **General links** to any other data records
- **Creation** in the **New** menu, the toolbar of data record windows and list views, the tree view and the time record calendar
- **Global search** in all time record fields such as **Subject**, **Start** and **End**. Configurable via **Settings** > **Search**; search toolbar abbreviation **TR**
- **Views** in the program navigator (list, dossier, calendar) and in the link navigator (link list, calendar)
- **Time zone support** (**Start** and **End** fields in client time zone with Timezone module)

### 6.1.2 Creating time records

You can create time records for addresses, appointments, documents, e-mails, holiday entries, jobs, opportunities, phone calls, projects and tasks.

**Create time record:** To create a time record for another data record, click on the **Create time record** button in the toolbar of its data record window or a list.

**Start recording time:** To start recording time in the background, proceed as follows.

- ✓ Open the desired data record in the data record window or mark it in a list view.
- ✓ Click on the little arrow next to the **Create time record** button to open the associated menu.
- ✓ Select the **Start recording time** option in the menu.

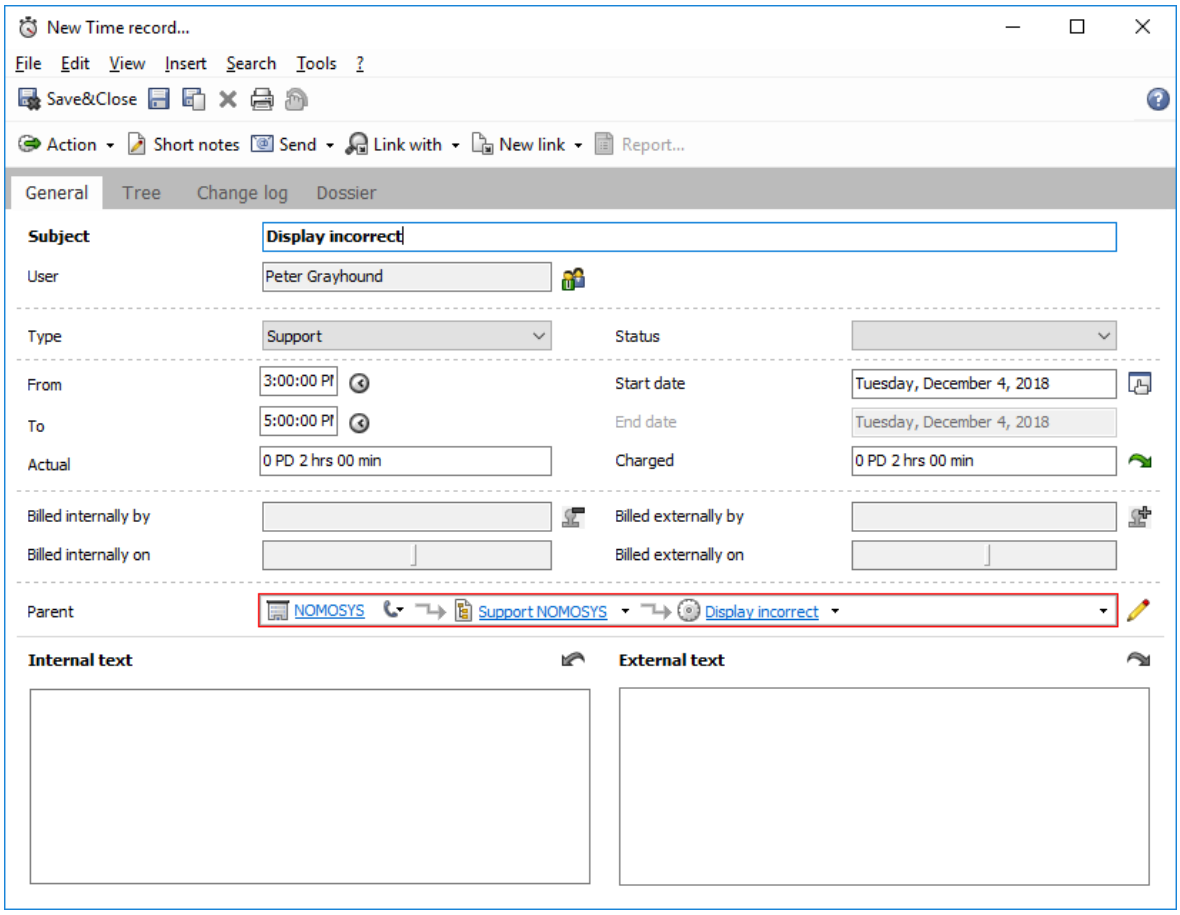
The data record window for a new time record opens.

The **To** and **Actual** fields are updated automatically.

A little green man next to the clock in the tray to the bottom right displays that time is being recorded.

**Exit:** By clicking this button next to the **To** field you stop the counter. You may now edit and save the time record. If you close the data record window without saving, the time record is dropped.

### 6.1.3 The data record window for time records




- The time record's **Subject** will initially be transferred from the associated data record. As for any data record, you may modify it as desired.

**User:** Each time record has exactly one participant. When you create a time record, you will be entered here. After saving, the participant can no longer be changed.

- The **Type** specifies the activity and determines internal and external hourly rates.
  - The time record type for tickets is selected in the Management Console under **Helpdesk** > **General**. By default, the **Support** type is used.
  - When you create a time record, the type of the associated data record is adopted if a time record type with the same exists.
  - The type may be modified as long as the time record has not been billed.
- You may use the **Status** to implement billing and approval processes.

**Start and End date:** You may modify the start date as long as the time record has not yet been billed internally.

The end date is adjusted automatically. You can not change it manually.

In time records spanning two calendar days (e.g., from 6:00 PM to 2:00 AM), the end date is set to the following day.

- The **Actual** working time, which will be billed internally, is determined by the time record's duration that you enter via the date and the **From** and **To** fields.
  - **Granularity and minimum:** In the Management Console, you specify the time record granularity between 1 second and 1 hour. This is the precision of the **From**, **To** and **Actual** fields and therefore the smallest recordable period.
  - **Maximum:** The **Actual** working time to be recorded in a time record may amount to a maximum of 24 hours minus the granularity, spanning up to two calendar days.
  - **Rounding:** Time records below the specified granularity will automatically be corrected to the smallest admissible value. For example, with a granularity of 1 minute, entries of 1 second will always be set to 1 minute. Above the specified granularity, time records are rounded commercially (e.g., with a granularity of 1 minute, an entry of 0:01:30 will be rounded up to 2 minutes).
  - **Start and end of new time records:** Time records for appointments, phone calls and holiday entries will adopt the start and end of the associated data record.

    When you record time in the calendar, the marked interval will be adopted.

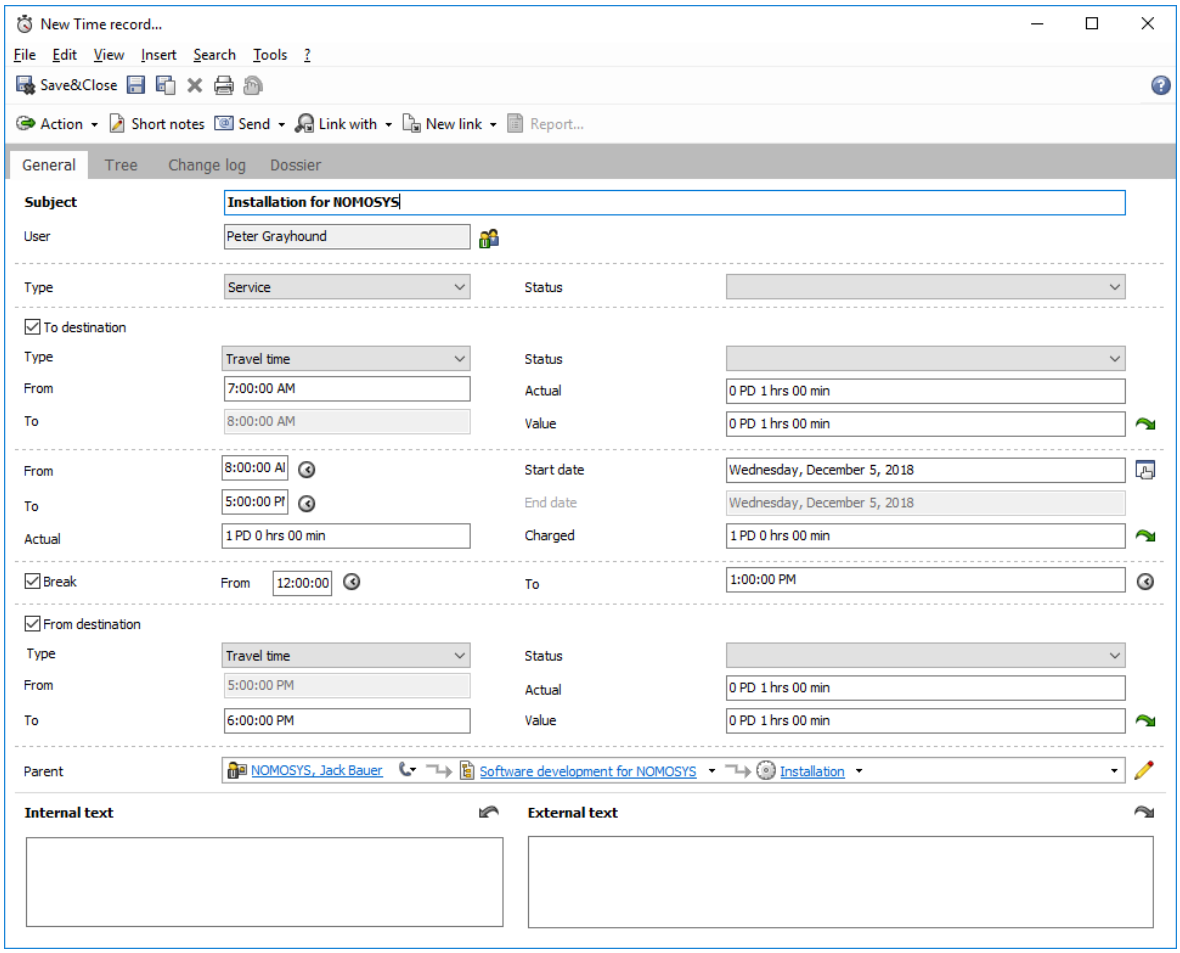
    Otherwise, the end of your previous time record will be entered as start and the current time will be entered as end. The first time record of the day will adopt the start of your working hours as start.
  - **Working hours:** The working hours are read from the settings provided in the Management Console under **Time record** > **Working hours**.

    For users for which no working hours have been entered there, the working hours stored in the user settings in the **Calendar** tab will be applied.
  - **Person days (PD):** In the default setting, a person day spans 8 hours. You may change this in the Management Console under **Time record** > **General.**
  - **Overlap check:** If overlaps with other time records are detected while trying to save a time record, a list of the overlapping time records is displayed. You can turn the overlap check off in the Management Console under **Time record** > **General**.
- **Charged:** In addition to the **Actual** working time, each time record has an externally billable **Charged** order value. This is initially zero and may differ from the actual hours or be set equal to it. The order value isn't limited to 24 hours.

  **Apply Actual as Charged:** Here you transfer the **Actual** value to the **Charged** field.
- The **Parent** field displays as in other data records the time record's primary links. If desired, you may change the primary links using the associated features.
- **Internal and external description:** Record here additional notes for the time record. The external description is provided for work reports.

  **Copy external or internal description:** Here you overwrite the associated notes field with the content of the respective other field.

- **To destination, from destination and break for appointments:** Each user may activate the recording of trips to and from the destination and of a break for appointments (see "6.1.8 User settings for time records" on page 93.




Select the respective option in the data record window.

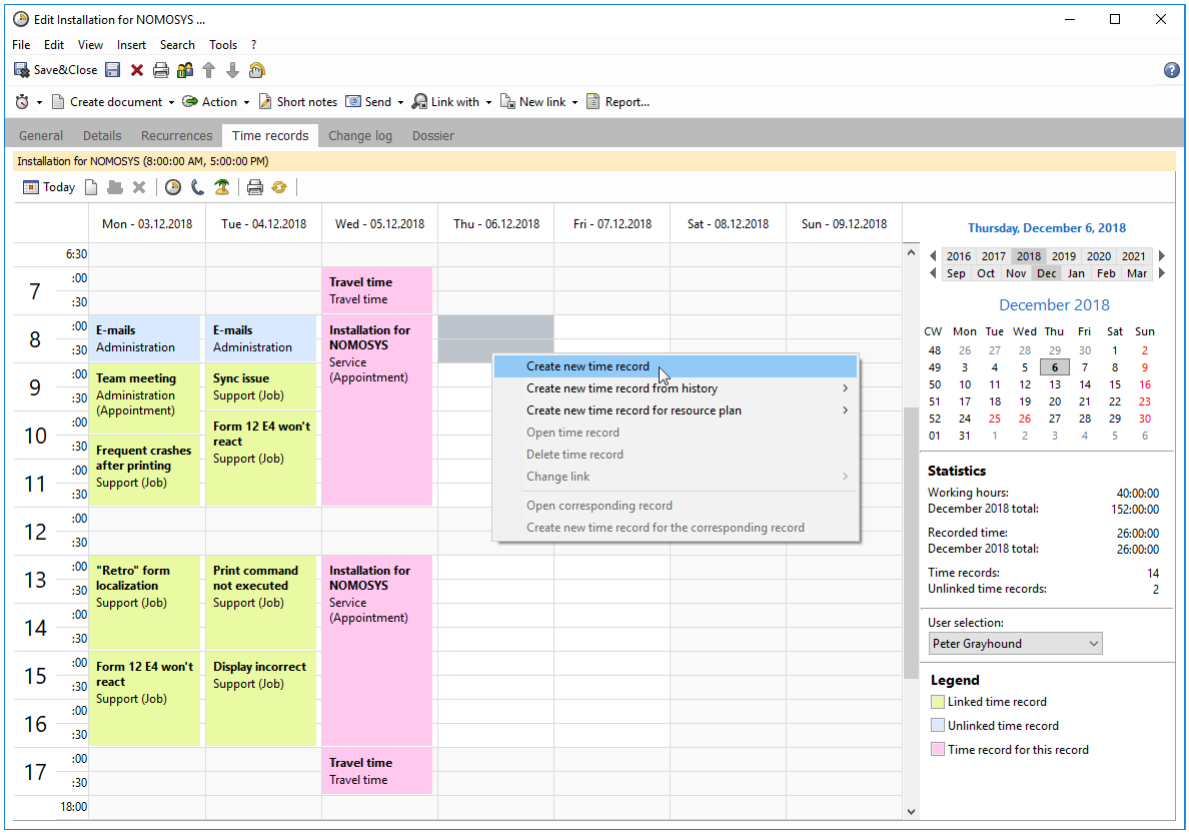
- To record the trip to the destination, enter the start or duration of the trip.
- To record the trip from the destination, enter the end or duration of the trip.
- If the trips to or from the destination should be billed externally, enter the billable period in the **Charged** field or apply the duration as order value by clicking on the **Copy duration to charged time** button.
- To record a break, enter the start and end of the break. In the default setting, the pause stretches from 12:30 to 13:30.

Trips to and from the destination will be created as separate time records when you save the record. If available, the **Travel time** type will be assigned automatically. If you specify a break, two time records will be created, one before and one after the break. If the total of **Charged** hours exceeds the **Actual** hours of the first record, the remainder will be booked on the second record. The **Internal text** and **External text** fields and all fields placed with Form Designer will be transferred to all time records created this way.

## 6.1.4 Time record calendar

You access the time record calendar via the program navigator, in the dossier and in the **Time records** tab of data record windows.

- **Program navigator and dossier:** The calendar is available in both the program navigator's view wizard and the dossier's view wizard as **Calendar for time recording**.
- **Data record windows:** The calendar is available in the **Time records** tab of the data record windows for addresses, projects, jobs, tasks, appointments, documents, phone calls and holiday entries.
  - **Settings:** In your user settings, under **Modules and Solutions**, you specify whether the **Time records** tab is displayed in data record windows. Here you also specify the view's presettings (see "6.1.8 User settings for time records" on page 93.)




- **Free time and working hours:** Free time and working hours are displayed with the same colors as in the calendar view for appointments, holidays, jobs and phone calls.

  You may change the colors in the **Settings** under **Calendar** > **Colors**.

  Other color settings of the default calendar won't be used.

  If available, the current working hours as entered in the Management Console under **Time record** > **Working hours** are used. For users having no working hours set there, the working hours stored in the **Settings** in the **Calendar** tab are displayed.

- **Colors**
  - **Yellow:** linked time record
  - **Blue:** unlinked time record
  - **Red:** time record for current data record (in data record windows)

## Note

> Please note that a time record's associated data record can not be changed at a later time if it stands below the job level. A time record created for an appointment, for example, stays associated with that appointment, even if the time record's primary links change or a general link between the time record and another data record is created.
>
> Time records created for an address, a project or a job, as well as time records which were not created for another data record, may be assigned to another address, project or job by changing their primary links.

- **Select start date:** At the top right, you select the view's start date.
- **Statistics:** The statistics display information about your working hours and your time records in the displayed period and in the current month.
  - **Working hours:** your working hours in the displayed period. Below it, your total working hours in the selected month are given.
  - **Recorded time:** the total duration of your time records in the displayed period. Below it, the total duration of your time records in the current month is given.
  - **Time records:** the number of your time records displayed in the calendar. Below it, the number of displayed time records without an associated data record is given.
- **Select user:** Here you access other users' calendars.
  - ✕ **Close shared calendar view:** Here you reset the view to display your own time records again.

## Creating and editing time records

The following sections describe the features for creating and editing time records in the time record calendar.

- **Create new time record:** Here you create a time record in the marked interval. Alternatively, you create a time record in the marked interval by right-clicking and selecting the **Create new time record** option in the calendar's context menu.
  - **Create new time record from history:** Select this from the context menu to create a new time record for one of the data records for which you have last recorded time. Only the primary links and the type of the original time record are adopted.

- **Fill gaps:** If you mark a period in which time records and gaps alternate and create a time record from history, each gap in the marked period will be replaced by a corresponding time record.

  This also applies when overlap checks are disabled for time records.

- **Create new time record for the corresponding record:** Open a time record's context menu and select the **Create new time record for the corresponding record** option to create a time record for the same data record.

- **Change link:** You may relink time records via the history. To do this, open the context menu by right-clicking on the time record whose link you wish to change. Select the desired option in the **Change link** sub-menu.
- **Open corresponding record:** Here you open the data record for which the time record was created.

**Open time record:** Here you open the selected time record. Alternatively, you open time records by double-clicking on them or via the context menu.

**Delete time record:** Here you delete the selected time record. Alternatively, you delete time records via the context menu. Before the time record is deleted you are asked for confirmation.

**Record appointments:** Here you record time for all appointments in the displayed period. If there is a time record type of the same name, the type of each appointment is adopted as the type of the associated time record.

**Record phone calls:** Here you record time for all appointments in the displayed period. If there is a time record type of the same name, the type of each phone call is adopted as the type of the associated time record.

**Record holiday:** Here you record time for holiday entries in the displayed period. In the process, a separate time record is created for each day off, spanning from start to end of the participant's working hours.

This operation will be available even if part of the holiday entry to record is farther in the future then time records may be created (see "Time window for the creation and editing of time records" on page 187) if time is to be recorded for a current holiday or a holiday starting on the next work day in the time record calendar.

## Note

In the Management Console, under **Time record** > **Calendar**, you specify which appointment phone call and holiday types may be recorded here (see "11.4.3 Calendar" on page 190).

If you wish to group holiday records by projects in reports, you may also select projects there for which leaves should be recorded. If a participant of such a project records his leave by clicking **Record holiday** in the calendar, the holiday records will be automatically assigned to the project.

**Print:** Here you print the displayed calendar page. Please note that the **Print** option in the **File** menu is not supported here. Use the **Print** button in the view's toolbar.

**Refresh view:** Here you apply changes made to time records while the view was open.

- **Change points of time:** move time records or change the duration via drag-and-drop.
  - **Move time record**
    - ✓ Click on the time record's start and hold the mouse button.
    - ✓ Holding the mouse button, move the pointer to the desired start time.
  - **Change duration**
    - ✓ Click on the time record's end and hold the mouse button.
    - ✓ Holding the mouse button, set the desired duration by moving the mouse.

## Creating a time record calendar in the program navigator

You insert the view in your program navigator in the following way.

- ✓ Right-click on the desired place to call up the context menu.
- ✓ Select **Create new view**. The view wizard opens.
- ✓ Select **Calendar for time recording**. Then click **Next**.
- ✓ Enter the desired name for the view. Then click **Next**.
- ✓ **Start date**
  - **Today:** In the default setting, the view displays the current date.
  - **Previous week:** With this option, the previous week will be displayed.
  - **This date:** With the **Use current month** or **Use current year** options, the current month or year is substituted.
- ✓ **Display mode:** Select here whether the day or week display should be used and specify the desired detail level (hours, half hours, quarter hours or 5 minutes).
- ✓ **User:** Select here the user whose time records should be displayed. Resources are also available for selection.
- ✓ Complete the creation by clicking **Finish**.

### 6.1.5 Billing time records

In a time record's data record window and in the list's context menu, you may bill time records internally or externally or undo billing.

- **Internal billing:** When a time record is internally billed, the following information is written in the associated time record fields.
  - **Internally billed by:** user
  - **Internally billed on:** date and time
  - **Internal hourly rate:** the current internal hourly rate for the user and type
  - **Actual costs:** internal hourly rate times **Actual**; values are stored with up to 4 decimals and displayed in lists and report views rounded to 2 decimals.

  In internally billed time records and without reading rights for the **Billed internally by/on** fields, the **Type**, **From**, **To**, **Actual** and **Start** fields may no longer be edited.
- **External billing:** When a time record is externally billed, the information is written in the associated time record fields.
  - **Externally billed by:** user
  - **Exernally billed on:** date and time
  - **External hourly rate:** the current external hourly rate for the user and type
  - **Actual turnover:** the external hourly rate times **Charged**; values are stored with up to 4 decimals and displayed in lists and report views rounded to 2 decimals.

  In externally billed time records and without reading rights for the **Billed externally by/on** fields, the **Type** and **Charged** fields may no longer be edited

**Billing in the time record list:** In the context menu for the time record list, you may access the **Bill** sub-menu.

The **Apply Actual as Charged** and **Set Charged to Null** options are only available with writing permissions for the **Charged** field. Additionally, reading permissions for the **Actual** field are required for the **Apply Actual as Charged** option.

The options **Bill externally** and **Reset the bill externally option** are only available with writing permissions for the **Externally billed on** and **Externally billed by** fields.

The options **Bill internally** and **Reset the bill internally option** are only available with writing permissions for the **Internally billed on** and **Internally billed by** fields.

You also need reading permissions for all time record fields in order to bill time records.

**Apply Actual as Charged:** Here you overwrite the **Charged** field with the **Actual** value in all selected time records.

**Set Charged to Null:** Here you reset the **Charged** field in all selected time records.

**Bill internally:** Here you internally bill all selected time records.

**Reset the bill internally option:** Here you cancel internal billing.

**Bill externally:** Here you externally bill all selected time records.

**Reset the bill externally option:** Here you cancel external billing.

- **Billing in the data record window:** In the lower third of the data record window for a time record, you can see the **Internally billed by**, **Internally billed on**, **Externally billed by** and **Externally billed on** fields.

  **Bill internally:** Here you bill the time record internally or cancel internal billing. The button is only available with writing rights for the **Internally billed on** and **Internally billed by** fields. You also need reading rights for all time record fields in order to bill time records.

  **Bill externally:** Here you bill the time record externally or cancel external billing. The button is only available with writing rights for the **Externally billed on** and **Externally billed by** fields. You also need reading rights for all time record fields in order to bill time records.

- **Billing in the report view:** In the **Billing** tab of a report view's properties, you can turn on the billing features in the view:

  - **Display button to internally bill time records**
  - **Display button to externally bill time records**

  You can access the billing features via the **Billing** menu in the report view's toolbar.

  First select the desired time records in the view. The select the desired billing action in the **Billing** menu. This works like in the time rcord list. The same restrictions also apply.

- **Specify external billing date:** With the **Bill externally** setting under **Time records > General** in the Management Console, you determine whether the external billing date may be modified. In this case, you can edit the **Externally billed on** field in the data record window and will be prompted to enter the billing date when billing time records externally via the time record list or report view.

### 6.1.6 Defining hourly rates for addresses and projects

In the toolbars of the data record windows for each addresses and projects, the **Hourly rates** button is available. Here you define hourly rates for a customer and thereby for all associated projects or hourly rates for a project. You may specify different hourly rates for a company and associated contact persons.

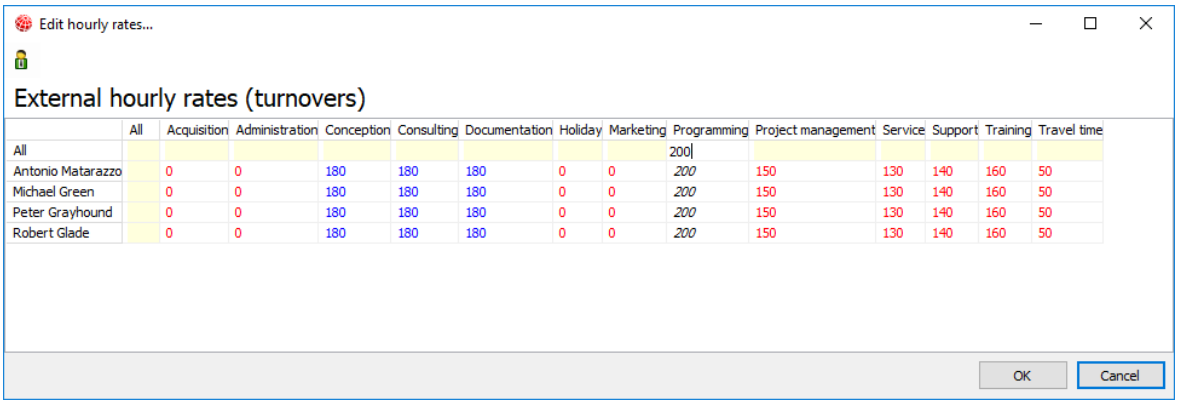
You may enter global hourly rates in the **Time record** area of the Management Console under **Hourly rates**. There, you also specify whether individual internal hourly rates may be entered for addresses and projects. By default, only individual external hourly rates may be entered for addresses and projects (see "11.4.4 Hourly rates" on page 191).

Entering hourly rates for addresses and and projects requires the **Time record: hourly rates** right. You can assign it in the Management Console under **User Management** in the **Other rights** tab of the user's **Properties** dialog.

Hourly rates for an address take precedence over global hourly rates.

Hourly rates for a project take precedence over hourly rates for an address.

**Hourly rates:** Here you open the hourly rates view.




| | All | Acquisition | Administration | Conception | Consulting | Documentation | Holiday | Marketing | Programming | Project management | Service | Support | Training | Travel time |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| All | | | | | | | | | 200 | | | | | |
| Antonio Matarazzo | | 0 | 0 | 180 | 180 | 180 | 0 | 0 | 200 | 150 | 130 | 140 | 160 | 50 |
| Michael Green | | 0 | 0 | 180 | 180 | 180 | 0 | 0 | 200 | 150 | 130 | 140 | 160 | 50 |
| Peter Grayhound | | 0 | 0 | 180 | 180 | 180 | 0 | 0 | 200 | 150 | 130 | 140 | 160 | 50 |
| Robert Glade | | 0 | 0 | 180 | 180 | 180 | 0 | 0 | 200 | 150 | 130 | 140 | 160 | 50 |

**Transfer hourly rates:** When internal hourly rates for addresses and projects have been activated in the Management Console, you may overwrite any values entered in the current view that are displayed in black with the respective values from the other view, **Internal** or **External**. This will also empty fields if the respective fields in the other view are empty. You may apply this change with **OK** or revert it with **Cancel**.

**Select participants:** Here you select the users and resources you wish to enter hourly rates for. Users and resources for which hourly rates have already been entered for the current address or project will be selected automatically. When entering hourly rates for a project, any other project participants will also be seelected.

When you remove a participant with hourly rates entered in the current view (address or project) that are displayed in black, these will be deleted after confirmation.

- **Global hourly rates** will be displayed in red. They are still valid for all users and types for which you have not specified different hourly rates.

- **Hourly rates for the address** will be displayed in blue when entering hourly rates for a project. They are valid in all projects for the address for all users and types for which you have not specified different hourly rates.
- **Entering hourly rates:** See page 192 for details.
- **OK:** Here you apply any changes you have made to the database.
  - **Transferring changes made to the company to contact persons:** If you change the hourly rates for a company, you will be asked whether the changes should also be transferred to the associated contact persons. In this case, the previous hourly rates for the contact persons will be overwritten.
- **Cancel:** Here you revert any changes.

### 6.1.7 Time record details in projects and jobs

In the **Details** tab of the data record window for projects, you may lock the project for time recording (see "0 The **Board view** supports the following interactions.

- **Open radial menu** by right-clicking on a card.
- **Change field value (group)** by dragging a card to another column and dropping it.
- **Create data records** by clicking on the plus button.

Project details" on page 114).

- **Lock for time recording:** When this option is set in a project, time records can no longer be created for that project. The **Actual** field in existing time records assigned to locked projects can no longer be modified.

#### Note

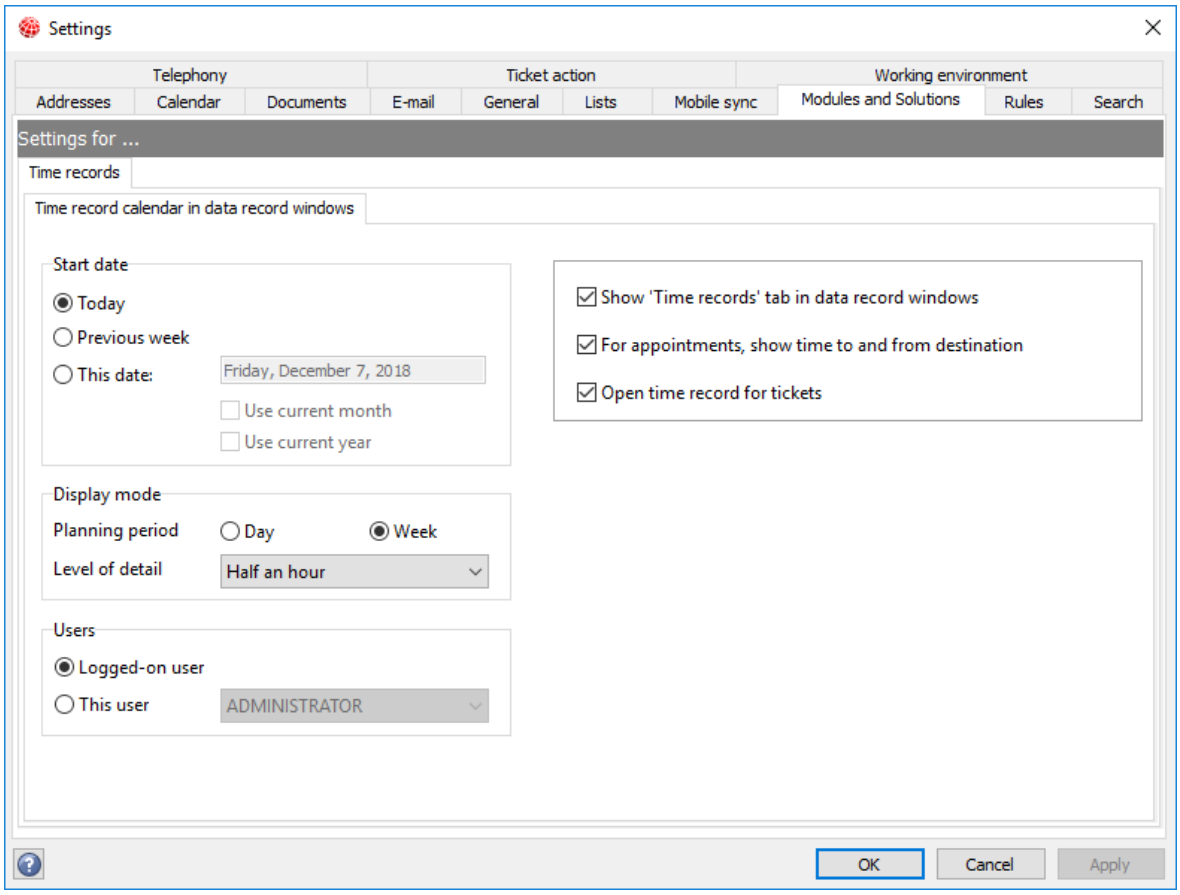
> The flexible job hierachy isn't considered here.
>
> Sub-tasks of locked tasks won't be locked automatically as well.

### 6.1.8 User settings for time records

In your **Settings**, you configure the time record calendar in data record windows, time records for appointments and time records for tickets. These settings only affect you.

To open your **Settings**, select the associated option from the **Tools** menu in either of the main or **Search** window or in any data record window. Then switch to the embedded **Time records** tab of the **Modules and Solutions** tab to edit time record settings.

## Time record calendar in data record windows




- **Start date:** Here you specify the start date of the time record calendar in the **Time records** tab of data record windows and in the dossier.
- **Display mode:** Select here whether the day or week display should be used and specify the desired detail level (hours, half hours, quarter hours or 5 minutes).
- **User:** Select here the user or resource whose time records should be displayed.
- **Show 'Time records' tab in data record windows:** Display the **Time records** tab for addresses, projects, jobs, tasks, appointments, documents, phone calls and holidays.
- **For appointments, show time to and from destination:** Here you specify whether panels for recording the time to and from your destination and a break will be displayed when you record time for appointments.
- **Open time record for tickets:** In the default setting, time records created for tickets using the associated button in the top right of the ticket's data record window are created automatically, not requiring any additional user action. Select this option to open time records you create for tickets this way in their data record window instead.

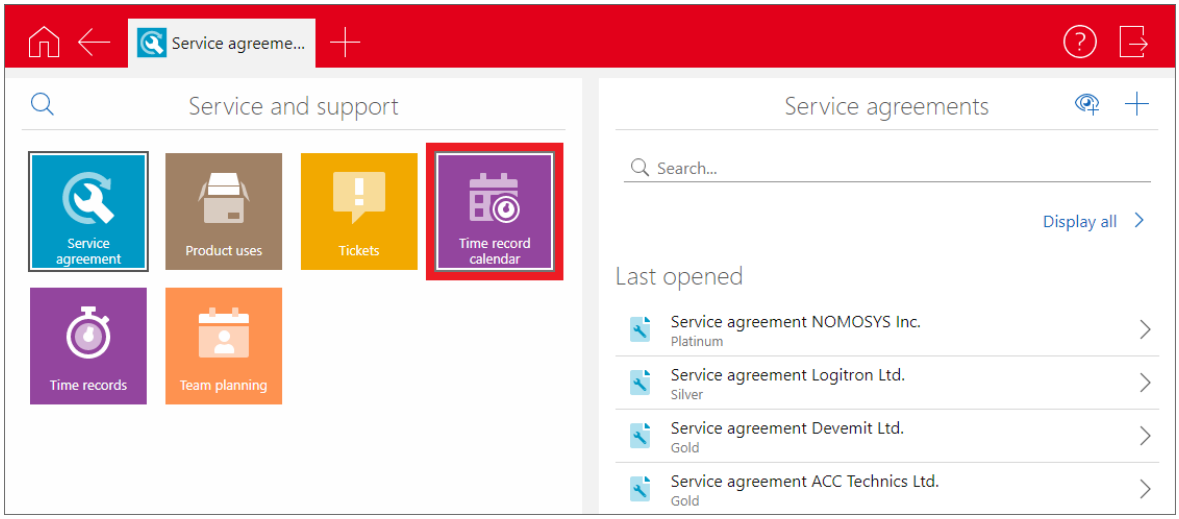
## 6.2 Time records in the Web Client

In the Web Client, you may record time via the following apps under **Service and support**.

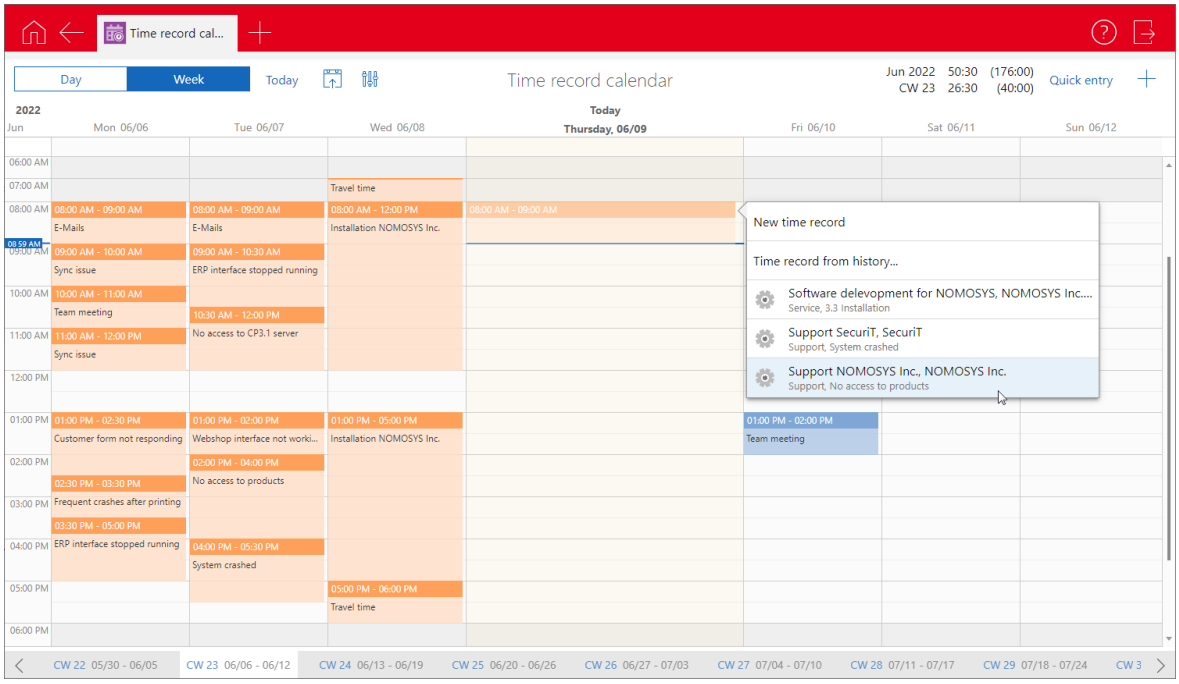

- 6.2.1 Time record calendar (page 95)
- 6.2.2 Time records (page 97)


### 6.2.1 Time record calendar

With the **Time record calendar** app in the **Service and support** app group, you can see and edit time records for the current day or week.




✓ Click on the associated tile to open the app.




- The calendar can display time records, appointments, holiday entries and phone calls.

Optionally, public holidays are also displayed.

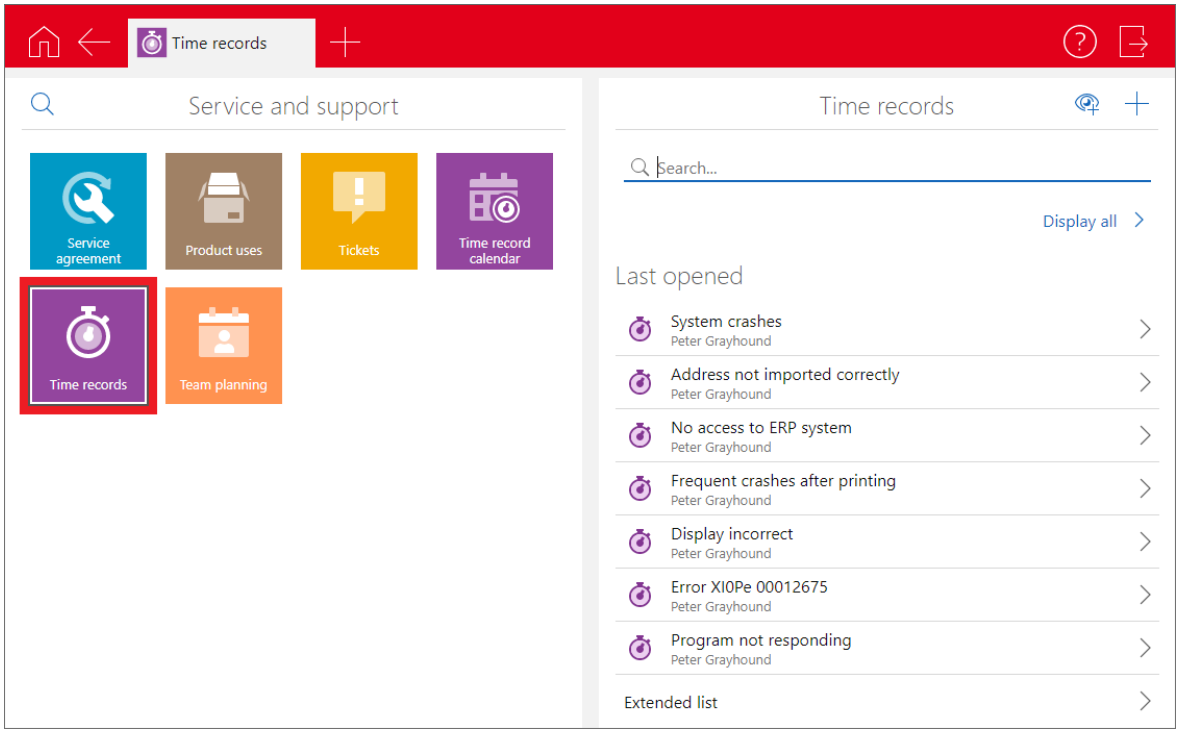
To select the data records to display and whether public holidays are displayed, click on the **Settings** button with the slider icon.

- The statistic, like in the Desktop Client, displays your recorded time and working hours in the displayed period and in the current month.
- Select a period or click a data record to create a time record.
  - When selecting a period, a history is available.
  - When clicking on on an out of office appointment, you can enter travel times to and from the destination and a break.
- The **Quick entry** record past appointments, holiday entries and phone calls in the displayed period, including data records that are not currently displayed.

Click on the question mark at the top right to open the online help pages for more details.

## 6.2.2 Time records

With the **Time records** app in the **Service and support** app group, you can see and edit existing time records as well as create new time records.




- In the **Time records** app start, you have access to your time records and associated views.
- Click on the eye icon to create a new time record list view.
- Click on a time record to open its detail view. You can also edit or delete it here.
- Click on the plus [+] icon to create a new time record.
- Additionally, you can create time records for most other data records.

  To do this, in the associated detail view, open the action menu with the three dots and select **Create** > **Record time**.

  Alternatively, you can record time via the radial menu for a data record in a list.

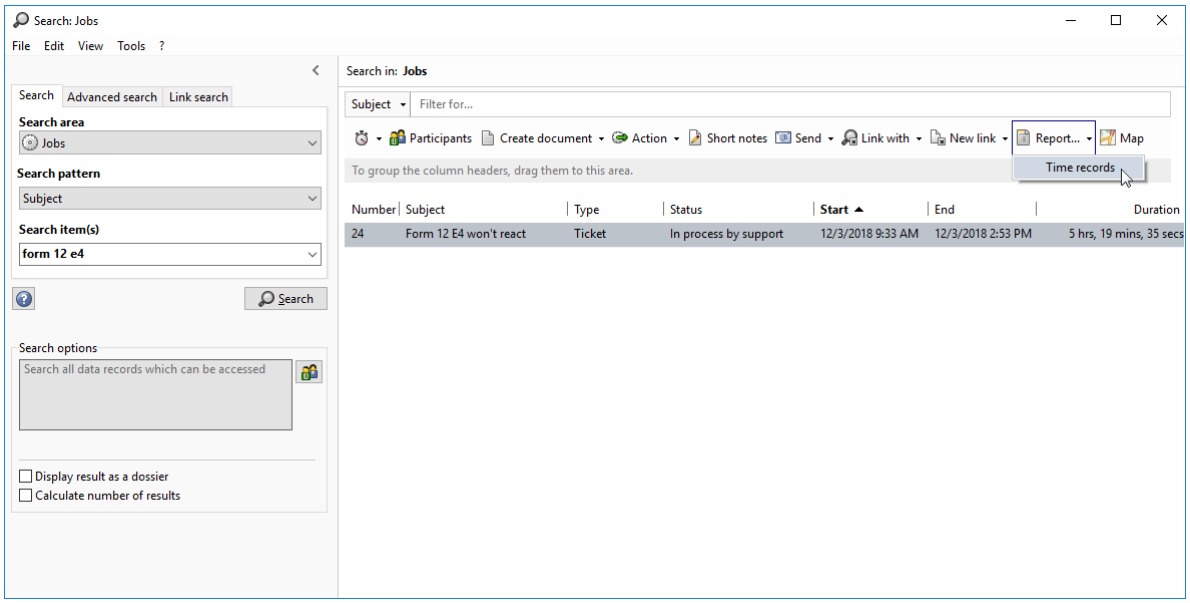
Click on the question mark at the top right to open the online help pages for more details.

## 6.3 Reports

With Helpdesk, you jave access to the **Time records** report for addresses, projects and jobs. Additionally, the Crystal Reports design **Work report** is available.



The reports will be added to the favorites of each user who is licensed for the Helpdesk module and has been granted the other right **Time record: analysis**. This way, they will be available in the associated menus for addresses, projects and jobs respectively, which you open by clicking on the little black arrow on the right side of the **Report...** button.




## Note

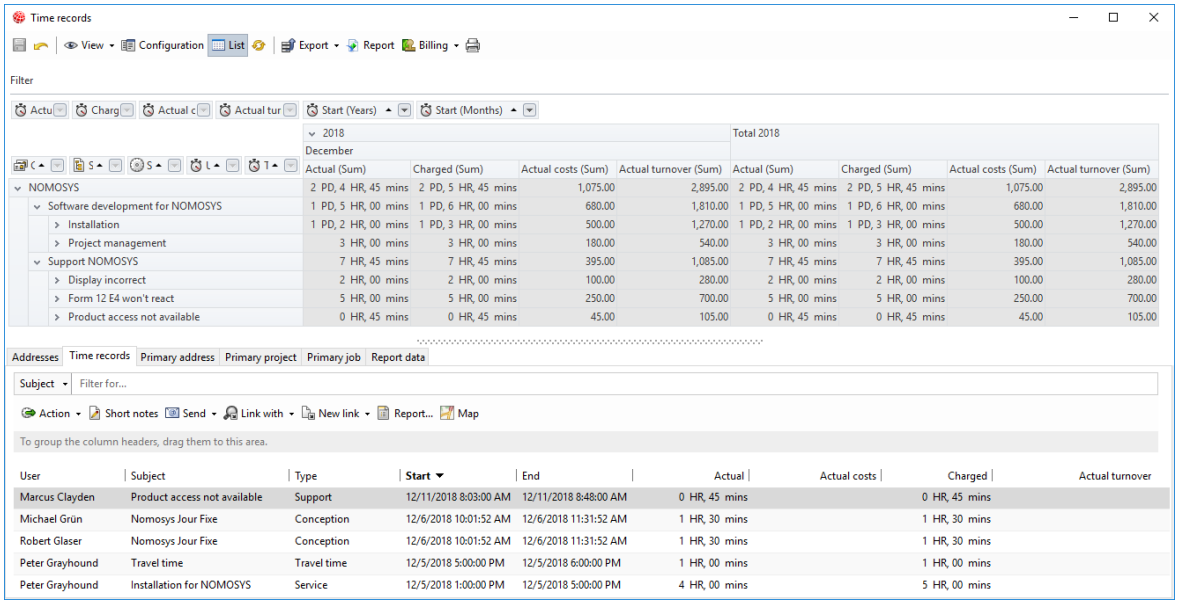
> You assign the required **Time record: analysis** right to users and groups in the **User Management** area of the Management Console, in the **Other rights** tab of the user's or group's **Properties**.

### 6.3.1 Time record report for addresses

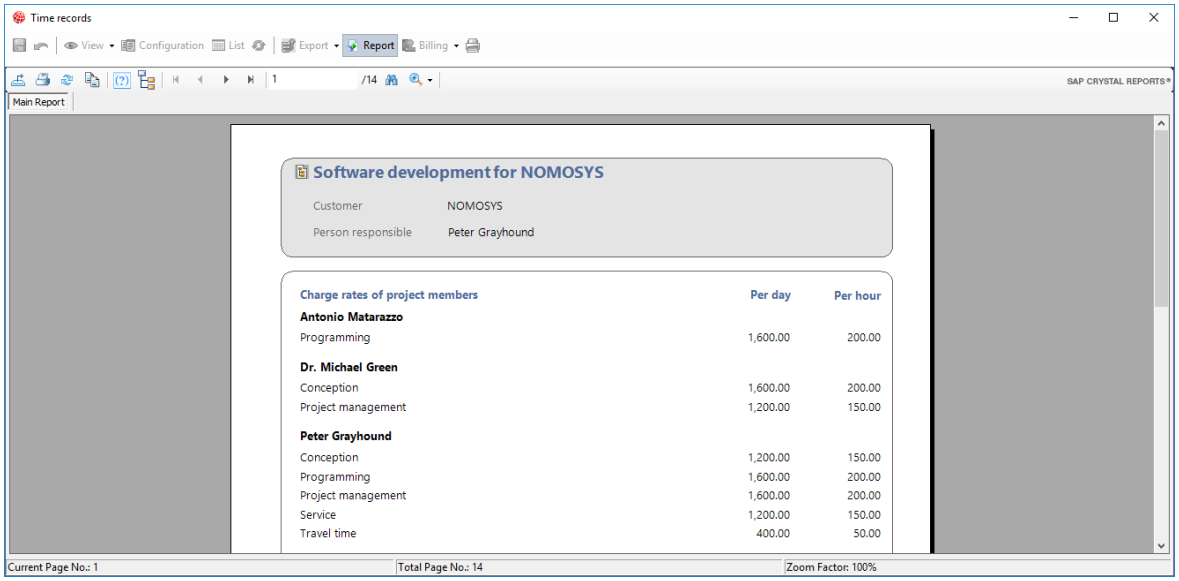
The **Time records** report for an address displays all time records stored with the address as well as the associated projects and jobs.

## Note

The address report's default link mode is **Overall dossier**. In addition to directly linked records, all records linked to the same company or one of its contacts will also be displayed. You may change this setting (see "6.3.5 Editing reports" on page 102).

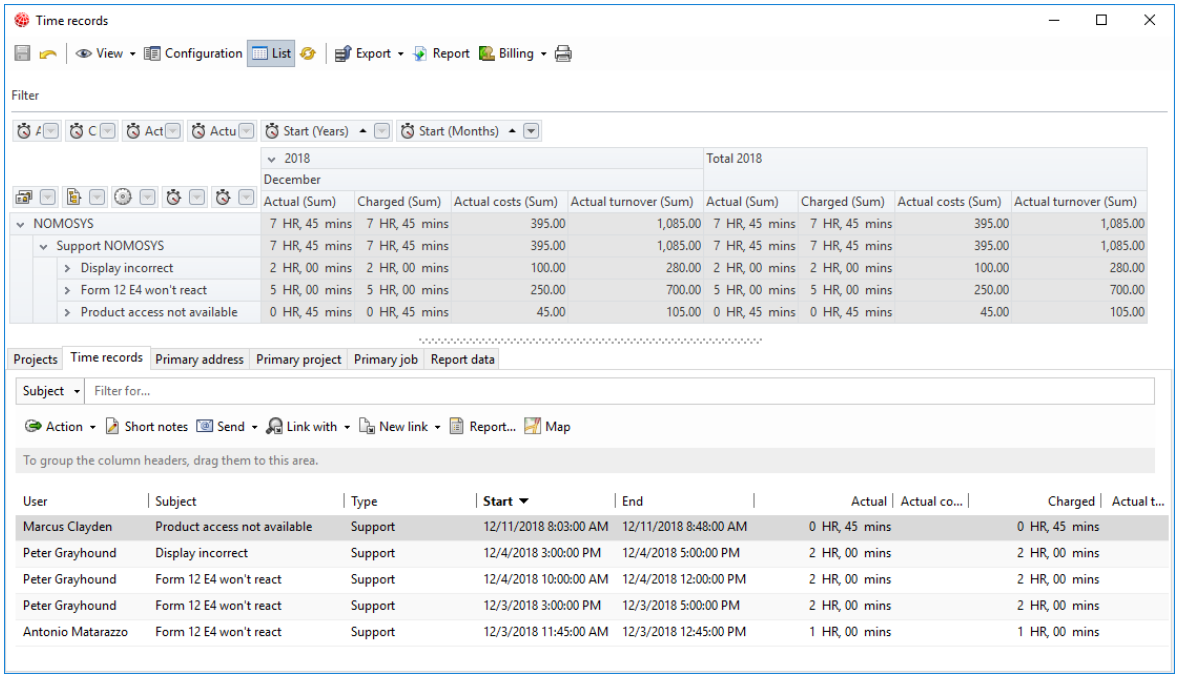



- **Other rights:** Time record: analysis
- **Display fields:** Actual, Charged, Actual costs, Actual turnover
- **Grouping row:** Address, Project, Job, User, Type
- **Grouping column:** Start (Years), Start (Months)
- **Crystal Reports design:** Work report

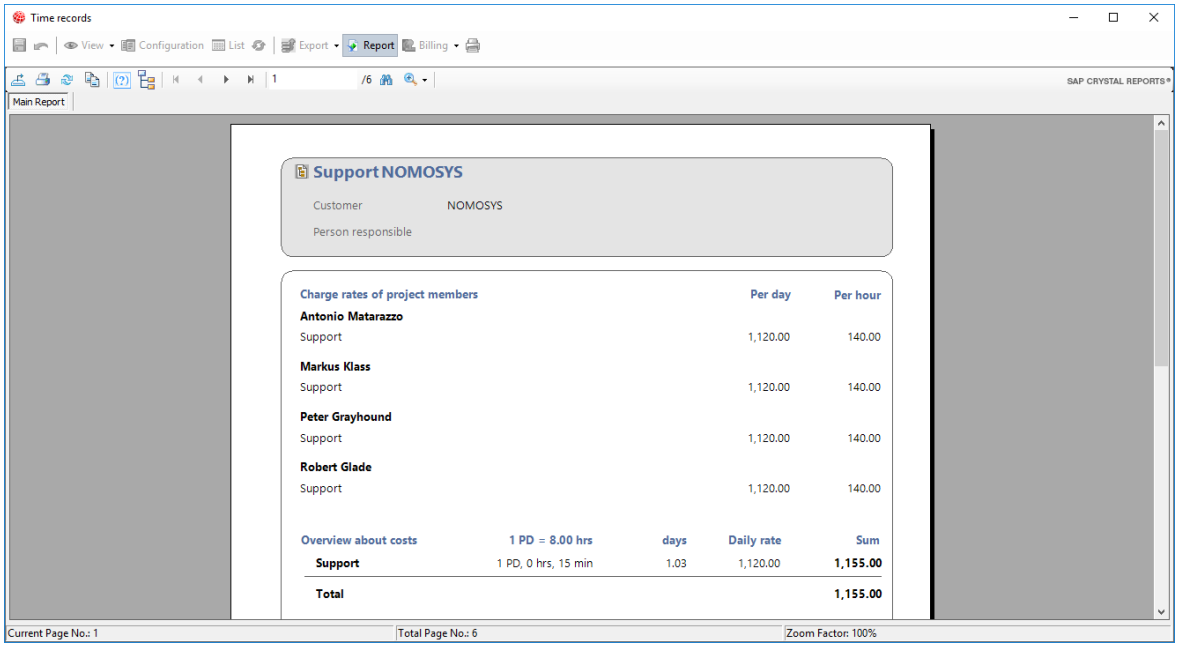


## 6.3.2 Time record report for projects

The **Time records** report for a project displays all time records stored with the project as well as the associated jobs.

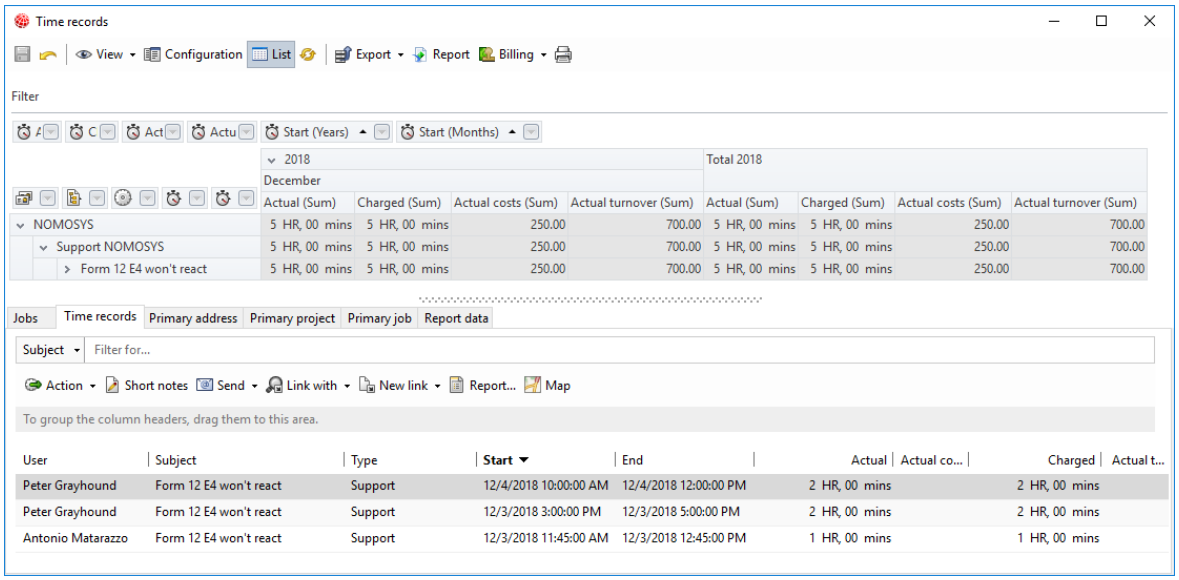



- **Other rights:** Time record: analysis
- **Display fields:** Actual, Charged, Actual costs, Actual turnover
- **Grouping row:** Address, Project, Job, User, Type
- **Grouping column:** Start (Years), Start (Months)
- **Crystal Reports design:** Work report

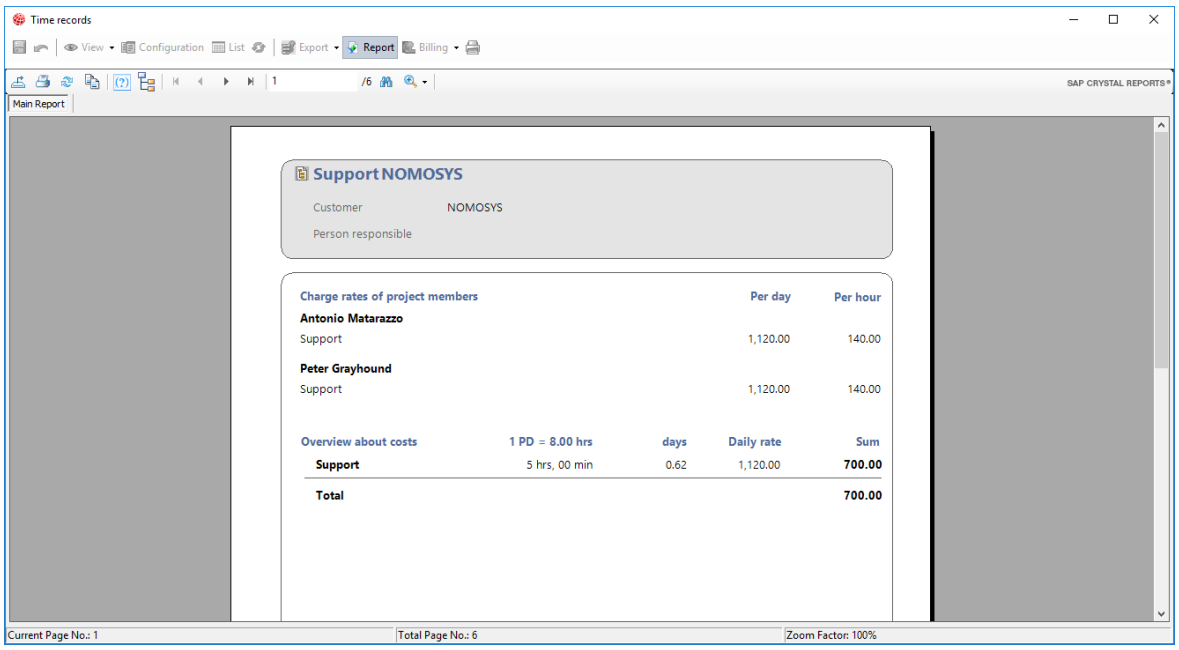


## 6.3.3 Time record report for jobs

The **Time records** report for a job displays all associated time records.



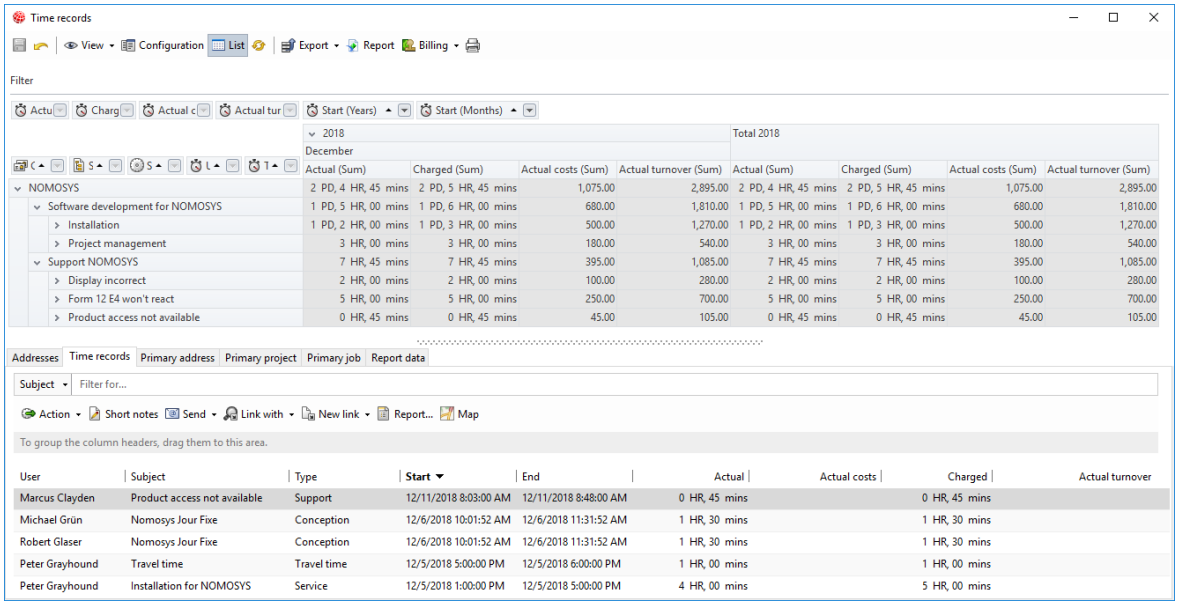

- **Other rights:** Time record: analysis
- **Display fields:** Actual, Charged, Actual costs, Actual turnover
- **Grouping row:** Address, Project, Job, User, Type
- **Grouping column:** Start (Years), Start (Months)
- **Crystal Reports design:** Work report



## 6.3.4 Working with reports

In the table view, you may access nearly all features for processing your data that are available with a Manager license for the Report module, such as:

- Filter via the arrow down button on the associated field
- Add and remove display values; change the calculation function (Sum, Minimum, Maximum, Average) via the associated context menu
- Add and remove grouping fields; regroup via drag-and-drop of fields
- Change the sort order via the context menu for a grouping field (by group name or by display value)
- Display as bar, area, pie or line diagram
- Prepare for billing, billing and vendor credit notes (see Project user manual, "7.8 Billing in reports (Desktop Client only)").
- Export to Microsoft Excel or Microsoft Access, as an xml or html file
- Create a report with Crystal Reports



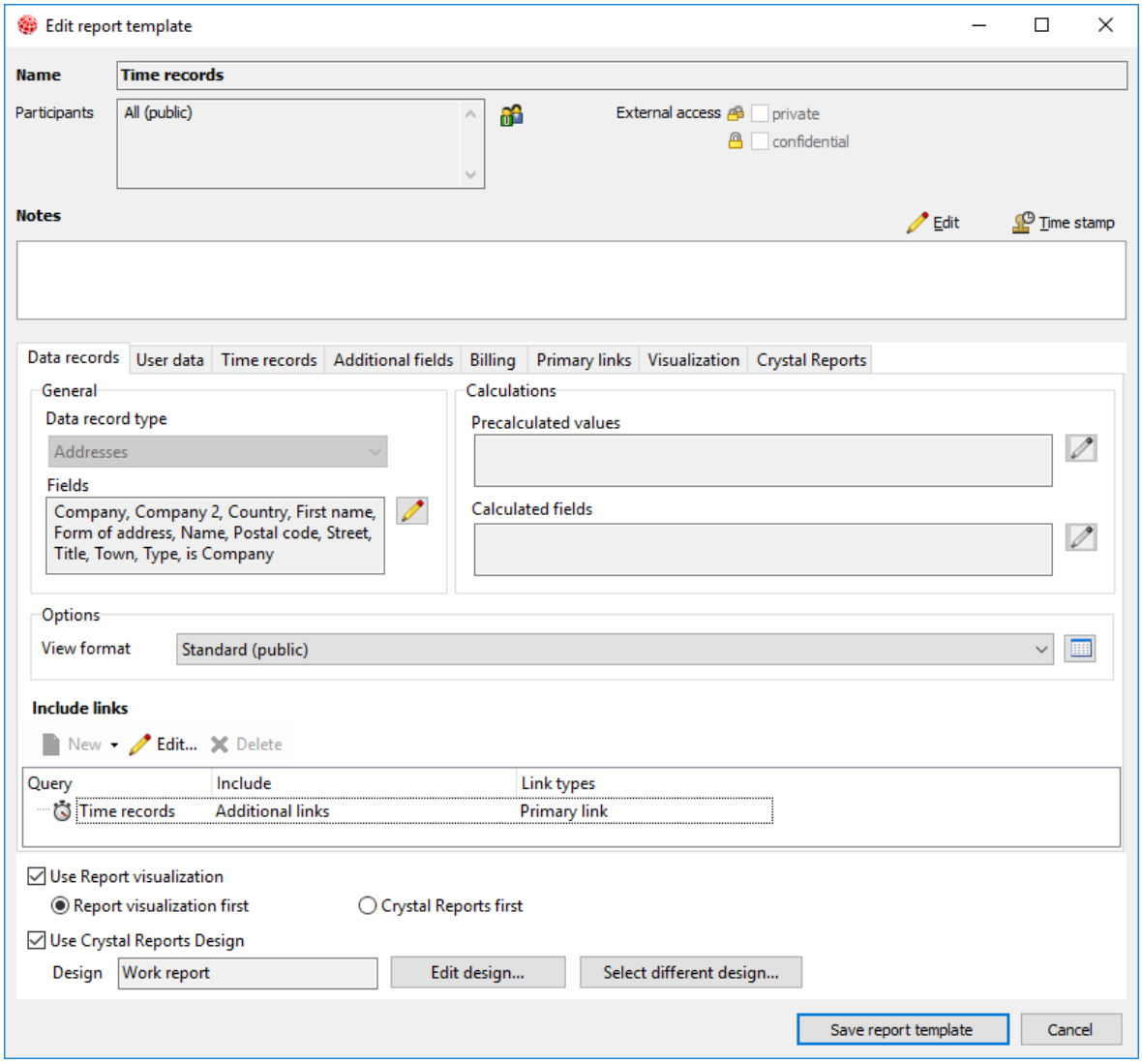

You can find details about the available features in the user guide for the Report module. The user guide's current version is available for download under the following URL: https://hilfe.cas.de/index-en.html.

## 6.3.5 Editing reports

You can edit most settings for the reports listed here. While you can't add or remove data record types via link queries, the following settings are editable:

- Remove or add fields

- Reset **Overall dossier** mode to **Normal** for address reports in order to only display data records that have been linked directly.
- Select more data (e.g. **User data** tab for time records and expenses)
- Activate preparation for billing, vendor credit notes and billing features (**Billing** tab)
- Preselect display and grouping fields (**Visualization** tab)
- Select a Crystal Reports design
- Enter Crystal Report Viewer settings for exporting and archiving created reports as documents in CAS genesisWorld (**Crystal Reports** tab)




You can find details about the available features in the user guide for the Report module. The user guide's current version is available for download under the following URL: https://hilfe.cas.de/index-en.html.

With a Report Manager license, you can duplicate the reports. The duplicates may then be edited freely, including adding or removing data record types via link queries.

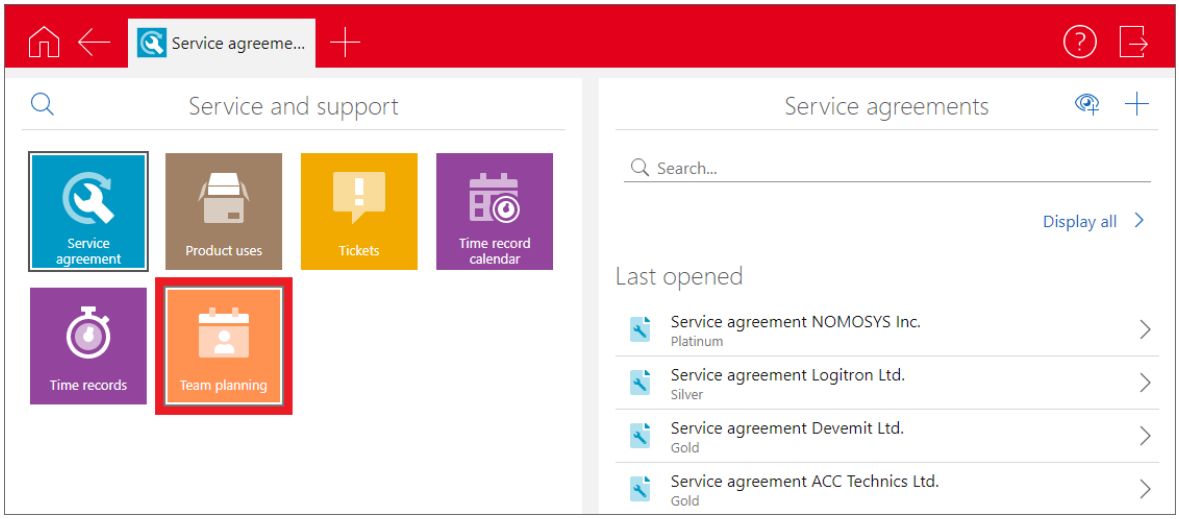
# 7 Planning views in the Web Client

In the Web Client, you have access to the following planning views with Helpdesk:

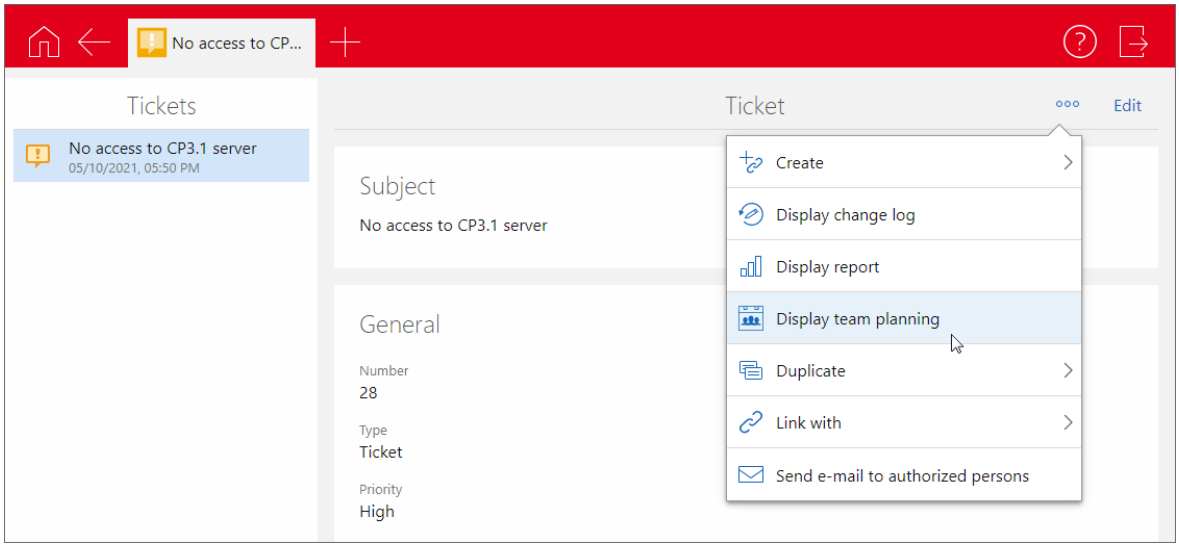
- **7.1 Team planning (page 104):** Scheduling for teams
- **7.2 Timeline view (page 109):** Chronological order of data records
- **7.3 Board view (page 112):** Group data records by field values

## 7.1 Team planning

The **Team planning** app is available under **Service and support** in the Web Client:




Instead of clicking on the associated tile, you can also open the app out of a ticket:



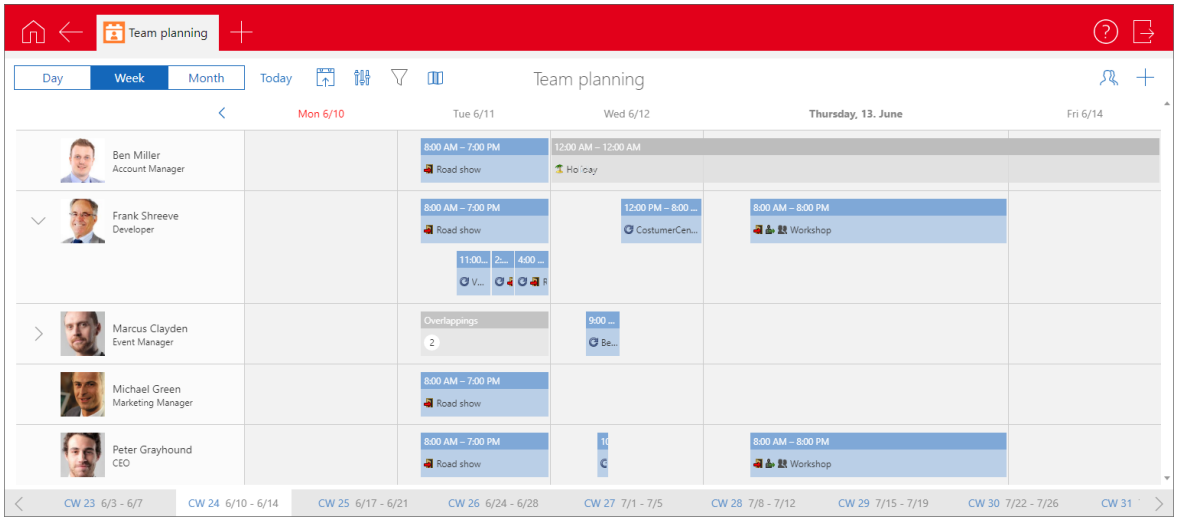

The app will then display the ticket's subject and highlight associated appointments. Appointments created in the app will adopt the ticket's subject and be associated with it. The option to add participants from the parent project is ignored here.

The following sections describe the presentation and features of the **Team planning** app.



## 7.1.1 Presentation and editing of appointments

The app displays a row for each selected user. Appointments (blue) and holiday entries (grey) are displayed per user and day on a timeline. Hints display appointment and holiday entry details. Public holidays are displayed with red captions.




- Click an appointment to open the associated editing view.
- Drag an appointment within a row to move it on the timeline. Please note that this is only possible for appointments that are completely displayed.
- Drag an appointment's left or right edge within a row to change its start or end.
- Drag an appointment between rows to replace a participant by another one (e.g., drag from a placeholder resource to a user to assign that user to the appointment, see "Resource as placeholder" in section "7.1.4 Change view settings" on page 108).
- Select a period to create a new appointment. Alternatively, click on the plus icon at the top right to create an appointment (see "7.1.6 Create appointment" on page 108).

🌴 Holiday entries are displayed as grey bars and can't be opened or edited in the app.

- Overlaps are displayed as light grey bars. Click on the grey overlaps bar or the arrow at the left edge of the associated row to expand all overlapping appointments and holidays.
- Icons displayed for appointments indicate various properties:

  Recurring (part of a series)

  Private

  Confidential

  Out of office

  One or more external participants

  One ore more participating groups

### 7.1.2 Change display mode and focus

The view displays the appointments of a day, week or month.

Click **Day**, **Week** or **Month** to change the view mode:

- **Day**
  - The timeline displays the day above and hours below.
  - The precision for displaying and editing appointments are quarter hours.
  - Initially, the first displayed hour is focussed and displayed with a greater width.

    Click on the column header of another hour to switch the focus.
- **Week**
  - The timeline displays the days of the selected week.
  - The precision for displaying and editing appointments are hours.
  - Initially, the current day (or Monday if the current week is not displayed) is focussed and displayed with a greater width.

    Click on the column header of another day to switch the focus.
- **Month**
  - The timeline displays weeks above and days below.
  - The precision for displaying and editing appointments are days.
  - Initially, the current week (when opening the view) or the first displayed week (after switching the date) is focussed and displayed with a greater width.

    Click on the column header of another hour to switch the focus.

### 7.1.3 Change display date

In addition to the view mode, you can select a date via the buttons at the top left:

- Click **Today** to jump to the current date.

Click this to select a date in the calendar.

- Alternatively, use the timeline below the view to switch to another date.

### 7.1.4 Change view settings

Using the slider, filter and user icons, you can change various view settings.

Click this to change view settings:

- Visibility of weekends
- Working hours to be displayed (start and end); please note that you can't drag appointments starting or ending outside displayed working hours.
- User employee address filter field (via filter icon at top right, see below); requires users to be linked with employee addresses.

  Any fields with multiple selection (checkbox list) input helps will be available.
- User employee address grouping field (users will be grouped by this field); requires users to be linked with employee addresses.

  Any fields with single selection input helps will be available.
- Resource as placeholder (displayed in a separate row to schedule appointments not yet assigned to a specific user. Drag such an appointment to the desired user to assign that user to that appointment).
- Color classification (select a field with a single selection input help to assign colors to field values. You may select the **Type** and **Status** fields individually or in combination. Select the **Type / Status** item to assign a color to each type and each type/status combination).

  Changes will only be applied after confirming your selection by clicking **Apply** both in the **Color classification** and **View properties** windows.

  Please note that, with a color classification by fields values, appointments for a ticket for which you opened the team planning view will no longer be highlighted by color.

Click this to filter the displayed users by the employee address filter field selected in the settings. Selecting multiple items will filter the view such that only users with all of these items will be displayed. For instance, if you filter users by language and select multiple languages, only users knowing all selected languages will be displayed.

Click this to select the users to display.

### 7.1.5 Display in map

Click on the map icon to display all appointments with a georeferenced primary address in the map view.

Click this to display the appointments of the team planning view in the map view.

- On the right hand side, a list of the appointments is displayed.
- Click on the location of one or more appointments to filter the list.
- Click on the location again to display all appointments again.
- Click on an appointment in the list to show its location on the map and other details.
- For locations with only one appointment, details of that appointment will also be displayed when you hover over the location.
- Use the toolbar to change the period or participants of the appointments to display.

### 7.1.6 Create appointment

Click on the plus icon or select the desired period (see "7.1.1 Presentation and editing of appointments" on page 105) to create an appointment.

Click this to create an appointment. Initially, you will be entered as participant. If a planning resource is selected, it will initially be entered as participant instead.

### 7.1.7 Collapse or expand user list

Click on the left arrow button above the user list to collapse it. The list will be displayed with a smaller width, showing only the user images stored in the associated employee addresses.

Click on the button again to display the user list with full width again, showing user images, names and descriptions.

Click this to collapse or expand the user list.

## 7.2 Timeline view

The following sections briefly outline the availability, visualization and features of the **Timeline view**, which is available in CAS genesisWorld Web with Helpdesk.

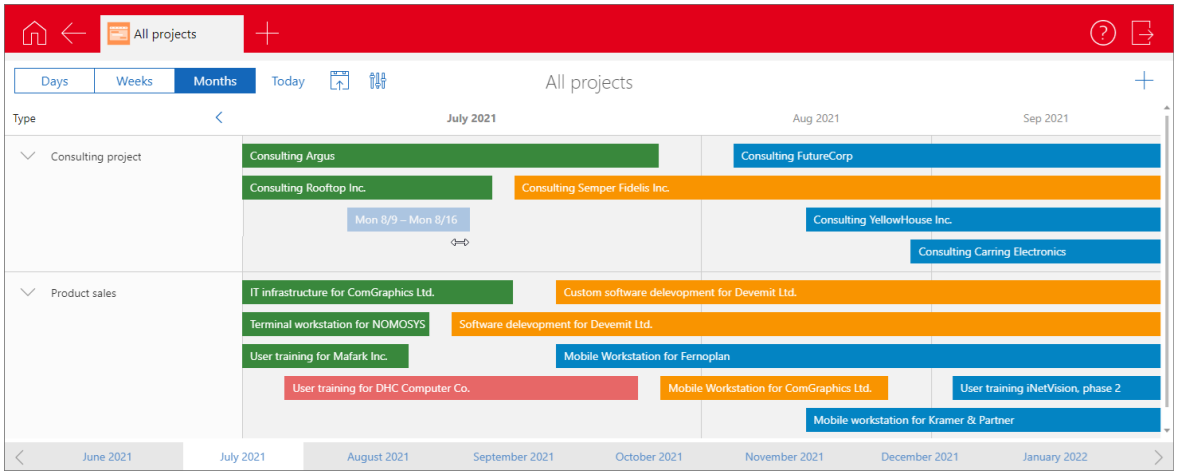


### 7.2.1 Licensing

When Report, Project or Helpdesk is licensed, the **Timeline view** is available in the Web Client (for Project and Helpdesk, activation in the Mangement Console isn't required).

### 7.2.2 General

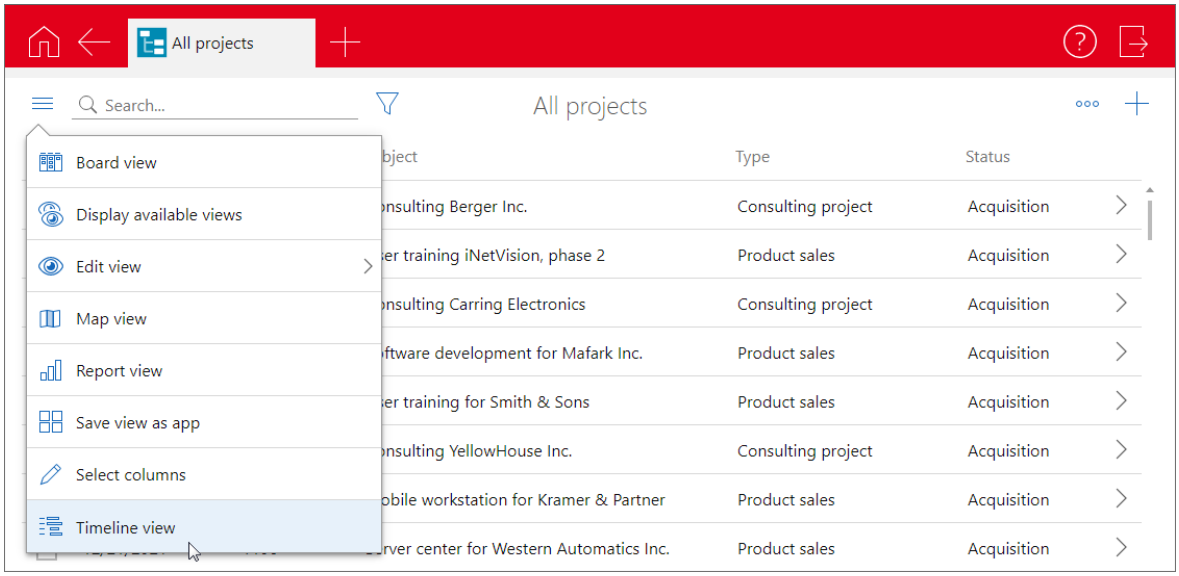
The **Timeline view** displays the chronological order of data records with a start and finish.




With either of the associated licenses, you may open the view out of saved list views for any type of data records with a start and finish.

Other than the standard data records type with a start and finish in CAS genesisWorld, the view will display any data record type with date fields named **START_DT** and **END_DT**.

✓ To open a **Timeline view** for the data records displayed in a saved list view, click on the three horizontal bar at the top left to open the view menu and select **Timeline view**.




## Notes

This feature is only available for saved list views listed under **Views** in the associated app. It isn't available for combined list views, list views with a link filter or list views that are currently filtered via the **Search...** field.

The opened view always contains all data records from the list view. Selecting data records via the checkboxes in the first column has no effect.

All settings will be restored when next opening the view. Configurations are saved per list view and user, such that other users can't overwrite your view settings.

## 7.2.3 Options

In the **Timeline view**, you have the following options.

- **Interval: Days**, **Weeks** or **Months**.
- **Start date: Today**, selection in the calendar or via the time bar below the view.
- **Settings**
  - **Visibility of weekends** (Visible/Not visible).
  - **Working hours to be displayed** (start and finish for each day).
  - **Number of columns** in day, week and month view.
  - **Use field for the grouping**.
  - **Use field for the color classification** and select colors for field values.

### 7.2.4 Interactions

The **Timeline view** supports the following interactions.

- **Open data record** via left-click on a bar.
- **Change start and/or finish** via drag-and-drop.
- **Create data records** with the plus button or by selecting a period with the mouse while holding the left mouse button. Not supported for all data record types.

## 7.3 Board view

The following sections briefly outline the availability, visualization and features of the **Board view**, which is available in CAS genesisWorld Web with Helpdesk.

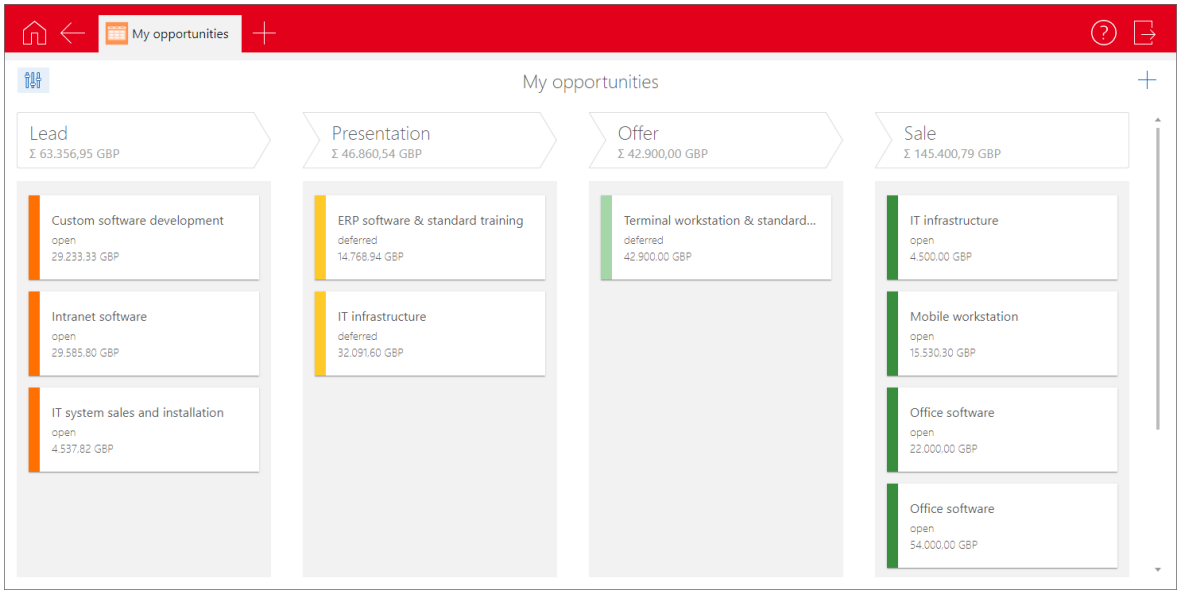


### 7.3.1 Licensing

When Report, Project or Helpdesk is licensed, the **Board view** is available in the Web Client (for Project and Helpdesk, activation in the Mangement Console isn't required).

### 7.3.2 General

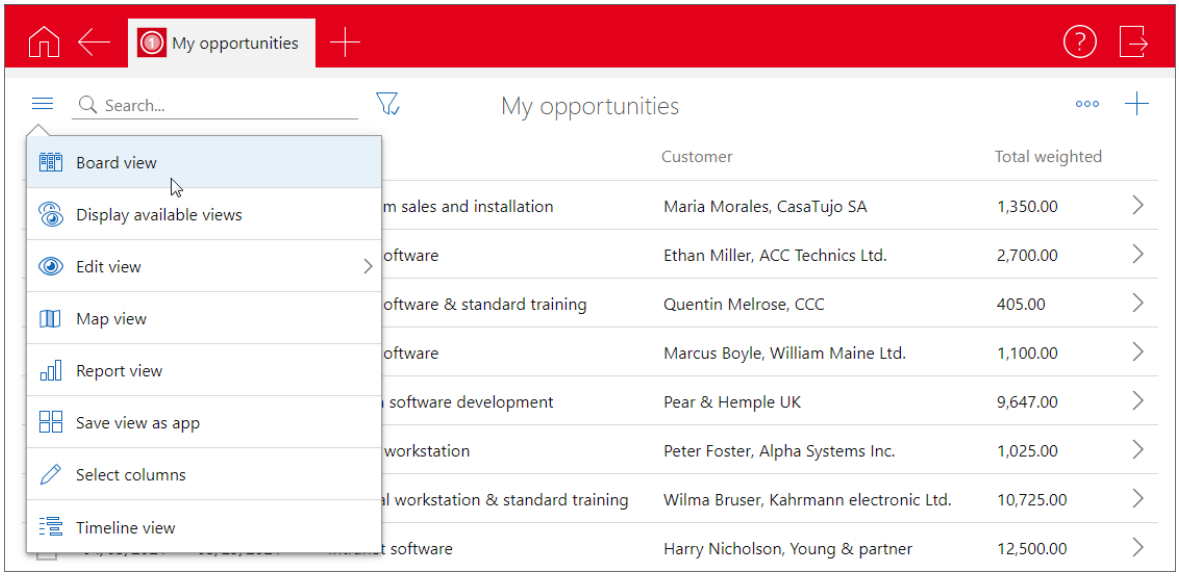
The **Board view** displays the grouping of data records by input help items of a field.




With either of the associated licenses, you may open the view out of saved list views for any type of data records that have at least one field with input help items.

The view is available for both standard and custom data record types.

✓ To open a **Board view** for the data records displayed in a saved list view, click on the three horizontal bar at the top left to open the view menu and select **Board view**.




## Notes

This feature is only available for saved list views listed under **Views** in the associated app. It isn't available for combined list views, list views with a link filter or list views that are currently filtered via the **Search...** field.

The opened view always includes all data records from the list view. Selecting data records via the checkboxes in the first column has no effect.

Only assignments of field values that are available as input help items will be displayed.

Data records with field values which are not or no longer available as input help items will be displayed as **Not assigned**.

All settings will be restored when next opening the view. Configurations are saved per list view and user, such that other users can't overwrite your view settings.

## 7.3.3 Settings

The following **Settings** are available for the **Board view**.

- **Use the following field for grouping:** Select here the field whose values will be displayed as columns for grouping the data records.
  - **Use the following type for grouping by Status:** If you select the **Status** field for grouping and the status depends on the type, status assignments will only be displayed for a specific type, which you select here in this case.

    Items with other values in the **Type** field will not be displayed in this case.
- **Display the following column values of the grouping:** Display or hide columns for specific field values here.

- **Use the following field for the sorting:** Select here the sorting field for records within a column. In addition to fields of the displayed data record type, you may sort by the first or second row as defined for that data record type in the App Designer with the **1. row** and **2. row** items.

  Sorting by the second row is always supported regardless of whether it is actually displayed in the board view (see **Also display the following field on the card**).
- **Use the following field for the sum row:** Select the number of cards or a field to display as sum in the header row here.
- **Offer currency fields in the base currency:** When you select a currency field for the sum row (e.g., **Total** for opportunities), this option will be available for converting data records with foreign currencies to your base currency and summing up column totals.

  This requires entering conversion rates from the base currency to the currencies of all displayed data records in the **Miscellaneous** area of the Management Console under **Currencies** (see "11.3.2 Currencies" on page 181).

## Note

> This feature isn't supported for fields of the **money** data type.
>
> Such fields will always be displayed in the base currency.

- **Also display the following field on the card:** The first row on each card can't be configured and is defined by the associated App Designer setting for the displayed data record type. For the second row, you may select between the App Designer configuration (default setting **2. row**) and fields of the data record type.
- **Use the following field for the color classification:** Select a color classification field here. This can be the grouping field or another field with input help items. Once you have selected a field, you can also select colors for individual field values.
- **Use the following field for the user picture:** Select a user field here to display the associated picture on each card.

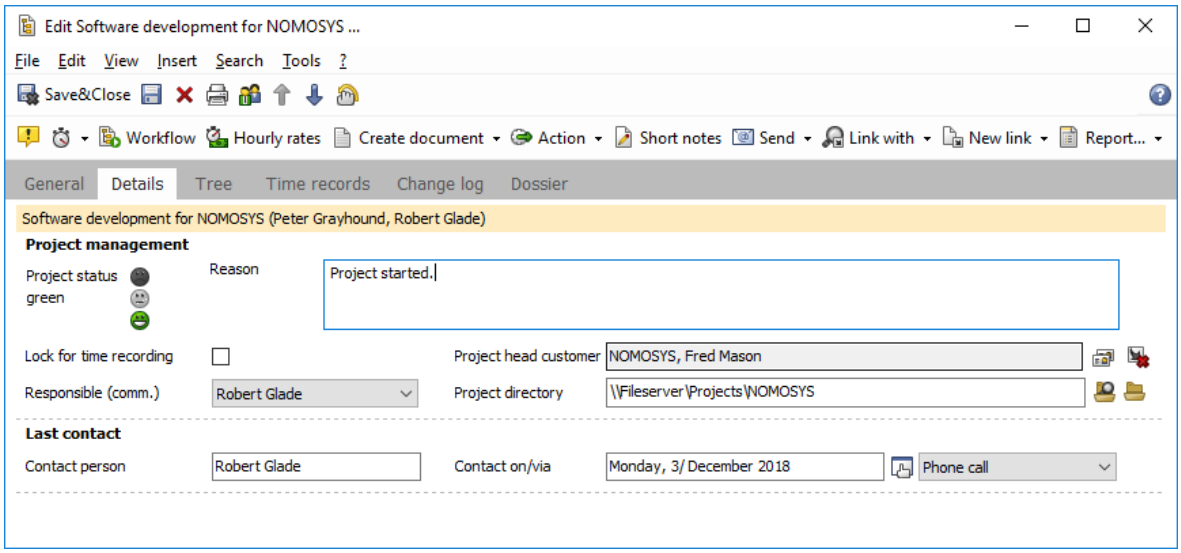
### 7.3.4 Interactions

The **Board view** supports the following interactions.

- **Open radial menu** by right-clicking on a card.
- **Change field value (group)** by dragging a card to another column and dropping it.
- **Create data records** by clicking on the plus button.

# 8 Project details

With Helpdesk, different features are available in the **Details** tab of the data record window for projects than those available there by default.




The calculation displayed here by default is dropped, since reports based on time records are available in the **Report** menu with the Helpdesk module.

The following features supplement the **Details** tab with Helpdesk.

- **Project management**
  - **Project status / Explanation:** The project status is available in the **General** tab without Helpdesk as well with CAS genesisWorld Premium. With the Helpdesk module, the project status is also displayed in the **Details** tab. Here you can also store a comment about the project status in the **Explanation** field.
  - **Lock for time recording:** When this option is selected, no additional time records can be created for the project and the **Actual** field in existing time records for the project can no longer be modified.
  - **Project manager (customer):** Link the customer company's project manager here.
  - **Responsible (comm.):** Sales executive.
  - **Project directory:** Directory for documents or other additional information for the project. You can display this directory in the project's tree view.
- **Last contact**
  - **Last contact on / Contact person / Last contacted via:** These fields are available here without Helpdesk as well with CAS genesisWorld Premium. The information is updated when certain appointments, phone calls, e-mails and documents are created for the project. In the Management Console, under **Miscellaneous** > **Last contact**, you specify in which cases a contact is recorded.

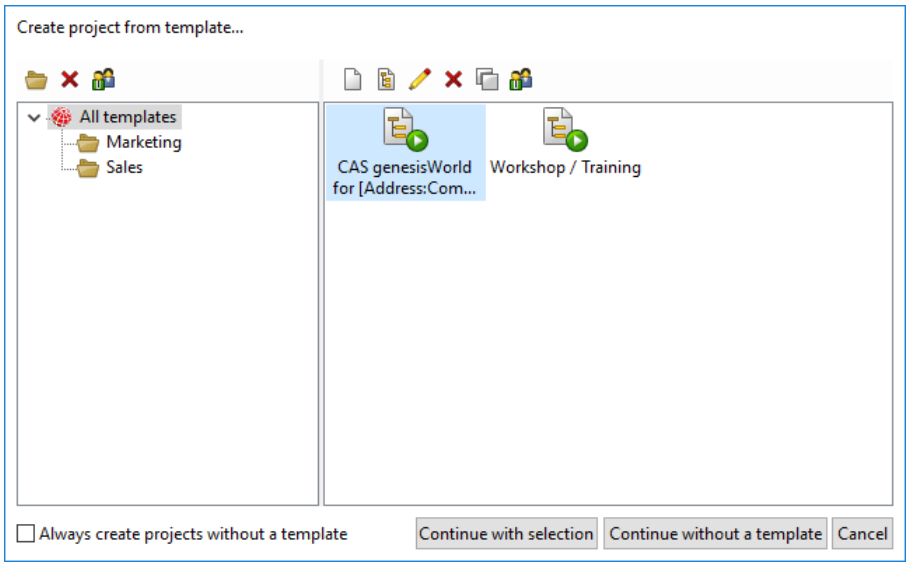
# 9 Using project and job templates

The following sections describe the features for project and job templates:



## 9.1 Using project templates

When you create a project, the selection of project templates opens first.




Under **All templates**, you can see all templates to which you have access. Select a folder in order to only display the templates it contains.

- **Continue with selection:** Here you create a project from the selected template.
- **Continue without a template:** Here you create a project without a template. You can add a template later (see "9.4 Adding or continuing a workflow" on page 124).
  - **Always create projects without a template:** Select this option to disable template selection. You can reactivate in your settings (**General** > **Deactivated messages**).
- **Cancel:** Here you close the template selection without creating a project.

In the **User Management** area of the Management Console, you can assign permissions for reading, inserting, changing and deleting of project and job templates.

### 9.1.1 Creating and editing templates

For creating and editing templates, the following features are available here.

**Create new template:** Here you create a new template in the template editor.

**Import project as a template:** Here you open a list for selecting the project to import. The selected project is loaded into the template editor with its tree structure.

**Edit template:** Here you open the selected template in the template editor. When you click **OK** in the template editor, changes are saved and you get back to the template selection.

**Delete template:** Here you delete the selected template. The **Continue workflow** feature will then no longer be available for associated projects (see "9.4 Adding or continuing a workflow" on page 124).

**Duplicate template:** Here you create a copy of the selected template.

**Change access rights for template:** New templates are initially owned by the user who created them. Here you open the **Select team** window in order to set access permissions to the template. The **Standard** permission is used.

### 9.1.2 Organizing templates in folders

For organizing your templates in folders, the following features are available here.

**Create folder:** Here you create a new folder.

- **Move template to folder:** Hold mouse button while dragging a template to a folder.
- **Detach template from folder:** To detach a template from a folder, open the folder and hold the mouse button while dragging the template to the **All templates** entry.
- **Rename folder:** To rename a folder, select it and click it again.

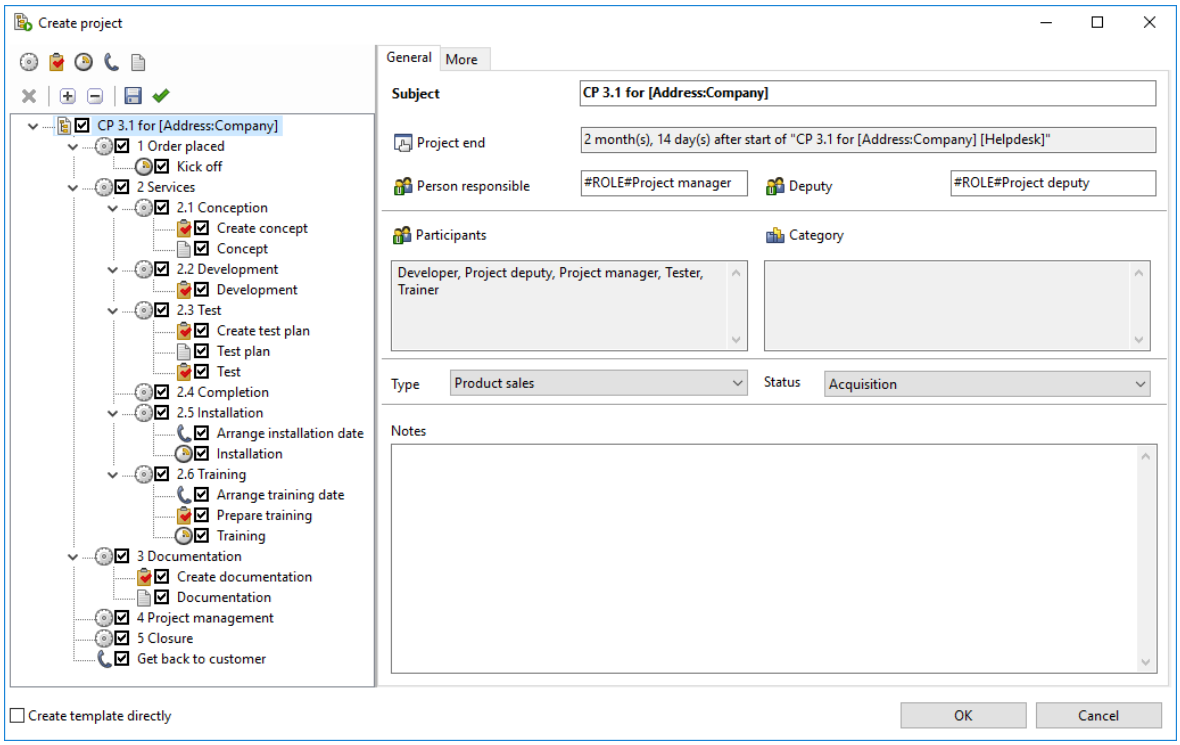
**Delete folder:** Here you delete the selected folder as well as any contained folders, project and job templates. Please note that the same folders are used for project and job templates, so it's possible to delete templates not visible in the current view.

**Change access rights for template:** New folders are initially public. Here you open the **Select team** window in order to set access permissions to the folder and all subfolders. This permission only entitles users to see the folder structure. Separate permissions are distributed for the contained templates.

## 9.2 Editing a template

In the template editor, you create and edit project and job templates.

The template editor opens when you create a new project or job from any template in which the **Create template directly** option is not selected.




- **Create template directly:** Select this if projects created from this template should open the template editor first.
- **OK:** Create the project from the template (**Create project** window), confirm creating additionally selected project steps (**Continue workflow** window) or save changes in the template and get back to the template selection (**Edit template** window).
- **Cancel:** Cancel creating or extending the project or editing the template without committing your changes.

### 9.2.1 Editing a project in the tree view

The following features are available in the tree view and the associated toolbar.

- **Insert data record:** Click on the symbol of a data record type to create a new data record of this type for the selected data record.

  **Jobs** are created in the project or in another job.

  **Tasks** are created in the project or in a job.

  **Appointments** are created in the project or in a job.

## Note

Creating appointments via project and job templates isn't supported when you are using the Exchange sync module.

- **Phone calls** are created in the project or in a job.
- **Documents** are created in the project or in a job from templates. Select a template and click **OK**. Click **Edit template** in the data record editor to the right in order to open the document template in the associated data record window.

☐ **Exclude data records from creation:** In the box next to each data record, you control whether the data record will be created along with the project or job.

- **Continue workflow:** Data records that were excluded from creation at first can later be added by clicking on the **Workflow** button in the toolbar of the data record window for projects (see "9.4 Adding or continuing a workflow" on page 124).
- **Automatic creation:** In the **Automatic creation** tab, to the right of the template editor, you select status options whose assignment to the project causes the data record selected to the left to be created automatically (see "Automatic creation by status" on page 122).

- **Modifying links and order of data records:** Via drag-and-drop, you can change a data record's association or the data records' order. To do this, click on the entry to move and, while holding the mouse button, drag it to the desired place.
  - **Change association:** Drag a data record on the project or on another job.
  - **Change order:** Drag a task, an appointment, a phone call or a document to another data record of one of these four data record types to insert the first after the latter.
  - **Association and order of jobs:** If you move one job onto another, a menu opens. Here you select whether the moved job should be inserted before, after or in the target job as its sub-job.

✕ **Deleting data records from the template:** You delete the selected data record from the template by clicking on the **Delete** button in the toolbar, by pressing the [Del] key or via the context menu. Before deletion you are asked to confirm. Like all changes, the deletion is only applied when the template is saved.

⊞ **Open tree:** Here you expand all branches.

⊟ **Close tree:** Here you close all branches.

**Save changes in the template:** When creating or editing a template, clicking **OK** saves the template. When creating a project or job from a template, changes are not saved automatically. In this case, click **Save changes in the template** to save the changes.

✔ **Check time relations:** Here you check the consistency of entered time relations (see "**Entering time relations**" on page 120.) Any insosistencies will be displayed.

### 9.2.2 Editing data records in the data record editor

In the default setting, the data record editor is displayed to the right. Via the **General** and **More** tabs you access any preallocatable fields.

## Note

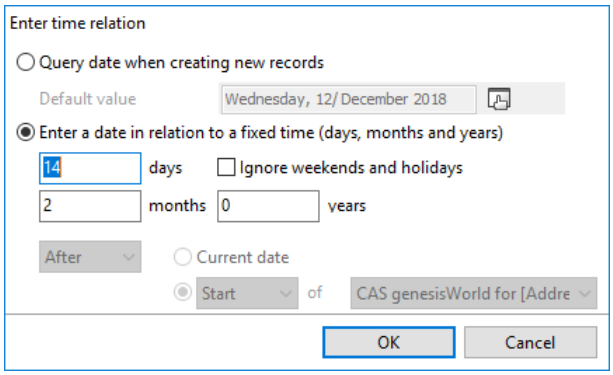
> Input helps of the **Selection tree** type are not fully supported in the **Category** field. If such an input help has been entered for this field, only top level items will be available for selection.

The following sections describe special features of the data record editor.

- **Transfer participants:** This is available for jobs, tasks, appointments, documents and phone calls. Here you assign to the selected data record the participants and resources as well as the **Maximum external access right** of its parent data record.
- **Using roles as placeholders:** By clicking on the **Participants** button you open the selection of participants. In addition to users and resources, roles are available here. These are replaced by users and resources when the project is created. Via the list to the left you create roles, delete or rename existing roles. Via the **Rights** button you limit data record access for the user assigned in a role. The **External access** menu is synchronous with the **Maximum external access right** menu and serves for limiting external access rights of other users to data records of the future participant.
- **Entering time relations:** When a project is created from a template, the current point of time is inserted as the project start. The project end results from the duration which you specify in the template. The project start and end may be modified in the project's data record window when it is created.

  When you save the project, all other data records will be created. You either specify associated dates as fixed dates to be entered when the project is created from the template or as time relations depending on the project start or end.

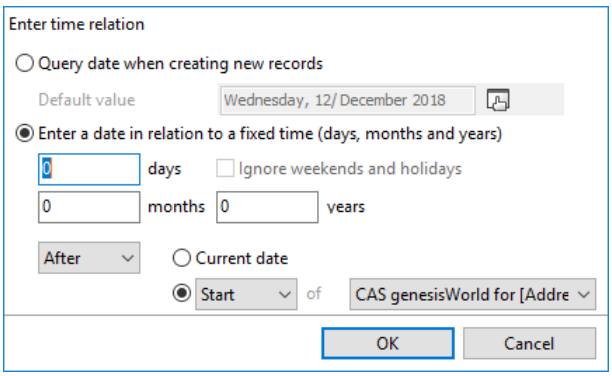
  - **Specifying the project duration:** Click on the **Project end** button to open the **Enter time relation** window.



Select **Query date when creating new records** if users should be prompted to enter the project end whenever a project is created from the template. Under **Default value**, you may also enter a default value for the project end.

Select **Enter a date in relation to a fixed time (days, months and years)** in order to enter the project's duration instead of the project end. The **Ignore weekends and holidays** option only affects the **days** specified. The options for other points of reference are disabled when entering the project end as you can only refer to the project start here.

- **Specifying the start and end of other data records:** Select a data record in the tree view. Then click on the button with the date you wish to specify in the data record editor. The **Enter time relation** window opens.




Select **Query date when creating new records** if users should be prompted to enter the date whenever a project is created from the template. Under **Default value**, you may also enter a default value for the date.

Select **Enter a date in relation to a fixed time (days, months and years)** in order to enter the date in relation to a point of reference. Like when entering the project end, the **Ignore weekends and holidays** option only affects the **days** specified.

Then select the desired point of reference.

With the **Current date** option, you may refer to the respective date of creation for data records you exclude from creation at first in order to add them later via **Automatic creation by status** or **Continue workflow**.

Moreover, the beginning and end of the project as well as the beginning and end of any other associated data records are available for selection unless a time relation referring to the current record has already been entered for them. When you enter the end date, you may also refer to the beginning of the data record itself like when entering the project end.

- **Set time:** For jobs, tasks, appointments and phone calls, you set the reminder time in relation to the data record's start or end.

- **Variables for address fields, project subject and roles:** The following sections describe the inclusion of placeholers in data record fields.

- **References to fields:** You may refer to any fields of all parent data records in the **Subject** and **Notes** fields. References will be replaced when the record is created if the required links are present (e.g., the project has a primary address).

  The references must be of the form `[Data record:Field]`.

  For example, `[Address:Company]` will be replaced by the company name of the primary address.

- **Roles in text fields:** Roles created in the team selection may be embedded in text fields (e.g., to enter the selected project manager in the **Person responsible** field).

  The references must be of the form `#Role#Name`.

  For example, `#Role#Project manager` will be replaced by the user selected for the **Project manager** role.

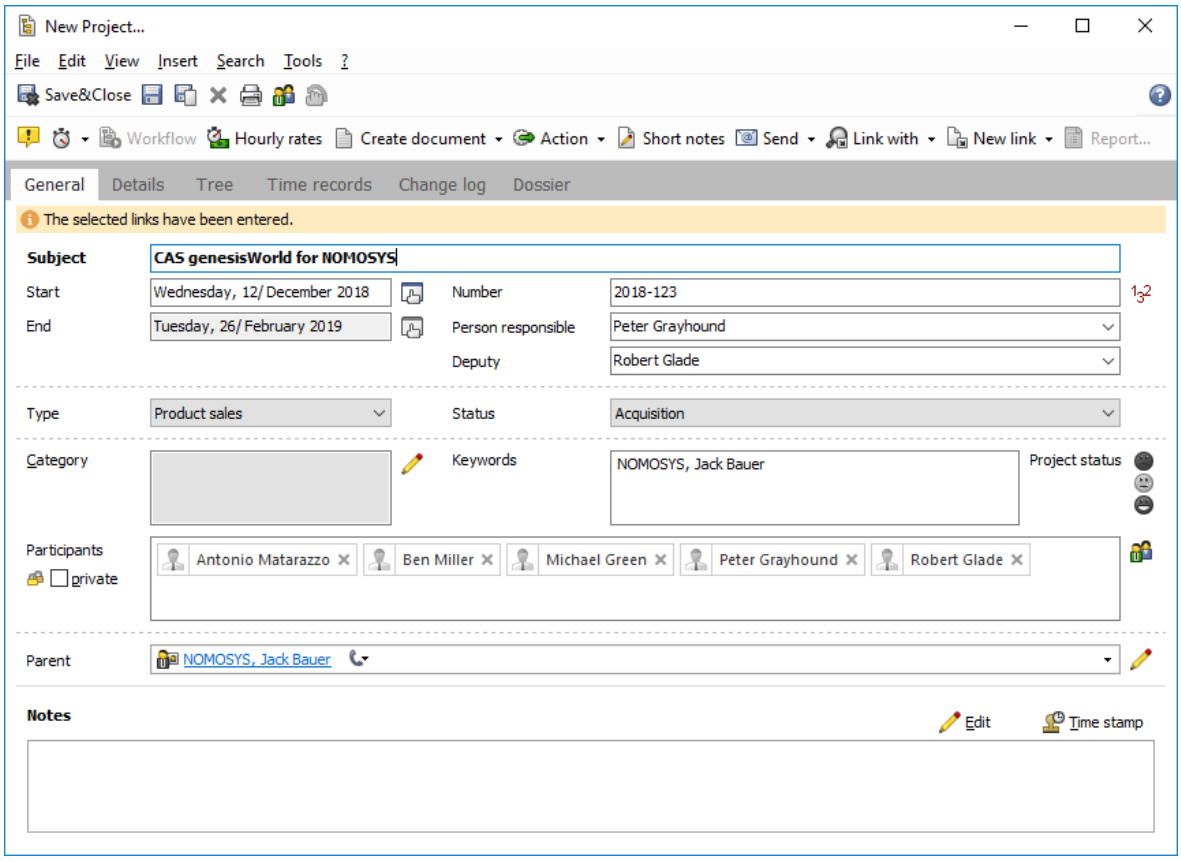
- **Automatic creation by status:** Data records initially excluded from creation may be created automatically when the project is saved with a status for which this is intended. If roles are included, the user is asked to select participants and resources.

  If you have assigned a type to the project in the data record editor, the associated status options will be available for selection for other data records in the **Automatic creation** tab. Here you select the status options whose selection in the project should cause the selected data record to be created automatically.

  - **Create with all subordinate data records:** Select this option if the automatic creation of a job should include the creation of its subordinate data records.

## 9.3 Editing a project in the data record window

After selecting a template and specifying any additional information that may be required, the project opens it its data record window.




✓ **Adjust start and end:** The current date is automatically entered as start. The end is defined by the duration entered in the template and may only be modified after saving. If you modify the start prior to saving, the end is shifted accordingly.

✓ **Save project:** If desired, make further entries for the project. Save it in a final step by clicking **Save** or **Save&Close**.

Any other data records in the template that were not excluded are now created.

## 9.4 Adding or continuing a workflow

Using the **Workflow** button in the toolbar of the related data record window, you extend a project in the template editor. To do this, the project template that was used must still exist. For projects not created from a template or whose template was deleted in the meantime, the template selection opens first.

The template editor opens in the **Continue workflow** mode in any case.

- Data records that were already created can no longer be modified here.
- All data records that have not yet been created or that have meanwhile been deleted are available for creation.
- Data records under a job cannot be created without the associated job. The same holds true for items in item groups.
- All features of the template editor are fully accessible in this view. However, changes made to the template cannot be saved.

✓ Select the data records to create by clicking in the boxes next to them.

✓ Confirm the project's extension by clicking **OK**.

If you have selected data records for creation to which roles have been assigned, you are now asked to select the intended participants and resources.

## 9.5 Using job templates

For job templates, the same features are available as for project templates.

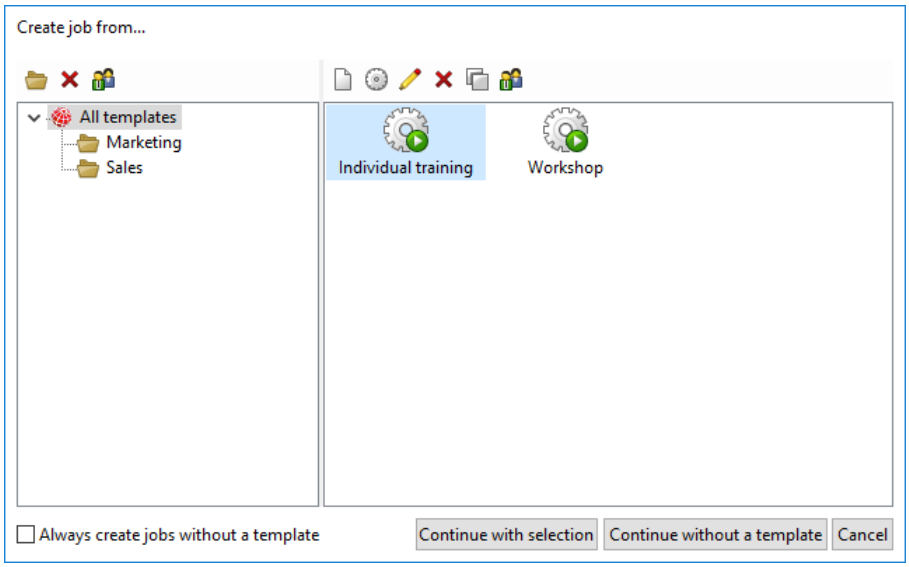
### 9.5.1 Project and job templates

The following segments briefly describe the interaction, differences and similarities of project and job templates.

- **Job templates in projects:** You may use job templates in different projects regardless of the use of project templates. When a process changes, you only need to adjust one job template instead of several project templates.
- **Job templates without projects:** Jobs from templates may also be used without an associated project.
- **Turning off the template selection:** The template selection for jobs may be turned off independently from the template selection for projects.
- **Continue workflow:** In the toolbar of the data record window for jobs, the **Workflow** button is available as it is for projects. Click this to extend a job created from a template or to add a template to a job which was initially created without using a template.

## 9.5.2 Specifics when using job templates

The following specifics apply to job templates.




- **Template folders for projects and jobs:** The same folders are used for project and job templates. Deleting a folder will also delete any project and job templates it contains. Please note that you may delete templates not currently visible this way.
- **Job is point of reference for all time relations:** When you enter time relations, the topmost job is the point of reference for any other data records. You therefore start by entering the job's duration. All other data records relate to the job or to other data records associated to the job.
- **Not available for tickets:** Job templates aren't available for tickets. The **Type** selection for a job template is filtered such that it doesn't include ticket types.

# 10 Helpdesk online

The following sections describe the installation, configuration and usage of the Helpdesk online support portal:



## 10.1 Installing Helpdesk online

A separate setup is available for Helpdesk online. You can find it on the CAS genesisWorld DVD or in the respective download in the "Portals" folder.

To install Helpdesk online, start the setup and execute the following steps.

- The setup first checks whether the CAS genesisWorld client and server as well as the .NET Framework 4.6.2 are installed. This is required for installing Helpdesk online.

  If not all required components are present, click **Cancel**, click **Yes** to confirm, then click **Finish** to abort the installation.

  Install the missing components and restart the setup.
- Confirm the message saying that the required components are available.
- Confirm the license agreement.
- You will be prompted to select the desired database and log on with a CAS genesisWorld user with Administrator permissions.
  - When Helpdesk online is accessed via the associated URL, the application will connect with the database specified here.

  - You can switch Helpdesk online to another database. To do this, start the setup again and select **Change**. Confirm the individual steps of the wizard and select the desired database.
- After the database has been adapted, you will be prompted to specify the desired web page and the associated virtual directory.
- You will be prompted to enter the installation directory.

### Note on Microsoft IIS

> Helpdesk online requires Microsoft IIS (Internet Information Services) as web server. Other web servers are not supported. If the IIS Windows features aren't active, they will be activated automatically when Helpdesk online is installed.

- Helpdesk online will now be installed. After successful installation, the application will be available in the selected virtual directory on the computer, on which you have installed Helpdesk online.

## 10.2 Configuring Helpdesk online

You configure Helpdesk online in the Management Console.

The most important settings are under **Helpdesk** > **Helpdesk online**:

- Under **Requests**, you enter one or more types of new requests like "Change request" or "Question". In the process, you specify precisely which data the user may or must enter.
- Also under **Requests**, you enter actions that allow users to modify a request in Helpdesk online. Filters make sure that the selection of available actions matches the type and status of the request.
- Under **Lists**, you enter an arbitrary number of list views. Filters specify which requests are displayed in each list.
- Under **Detail view**, you specify whether documents stored with requests are available online and whether a service agreement is displayed in the detail view.
- Under **FAQ**, you activate or deactivate the FAQ search and enter settings for it.
- Under **Personal area**, you may enter a web page with additional information that will be accessible as the first or last navigation item in Helpdesk online.

Other Management Console settings for Helpdesk online:

- The language selection under **Helpdesk** > **Notifications and languages** is regarded in Helpdesk online. With the associated language resources, Helpdesk online will be available in all languages selected there. The language resources must be installed on the application server used for Helpdesk online.

- Sending e-mails for the **Forgot your password** feature on the logon page as well as requires the configuration of a system e-mail account (Management Console **Rules** > **Server settings**).
- Additionally, most other settings in the **Helpdesk** area of the Management Console affect Helpdesk online.

The configuration of Helpdesk and Helpdesk online in the Management Console is described in chapter "11 Management Console settings" on page 147.

Section "2.6 Setting up access for Helpdesk online" on page 37 provides details about setting up access and about address links relevant for Helpdesk online.

## 10.3 Cookies

Helpdesk online stores the following cookies on the client side:

- **ASP.NET_SessionId (temporary, when logging on):** Controls the active session.

  This cookie will be deleted automatically when closing the browser.
- **HelpdeskOnline (while active, when logging on):** Selecting **Remember logon data** and logging on will create a cookie containing the user name and encrypted password.

  When the user accesses Helpdesk online again, he will be logged in automatically.

  When the user logs off, the encrypted password will be removed from the cookie.

  In this case, the user name will be retained and automatically entered when the user accesses Helpdesk online again.

  This cookie will be preserved until the user logs off, deactivates **Remember logon data** and logs on again, or until it is actively deleted.
- **HelpdeskOnlineLanguage (permanently, when opening the logon page or changing the setting):** Stores the language (see following section) to select it automatically when Helpdesk online is accessed again.

  This cookie will be preserved until it is actively deleted.
- **UserSettings (permanently, when logging on or changing the setting):** Stores user settings to restore them when logging on to Helpdesk online again.
  - Access level for displaying requests in lists (all / own company / only own), see **Views** > **Submitter** on page 137.
  - Selection of **Display only my products** when creating a new request, see **Product information** on page 142.

  This cookie will be preserved until it is actively deleted.

Saving the **HelpdeskOnline**, **HelpdeskOnlineLanguage** and **UserSettings** cookies requires that Helpdesk online internally uses an HTTPS connection in IIS.

## 10.4 Invocation and language selection

Helpdesk online is accessible with most internet browsers supported by CAS genesisWorld Web via desktop computers, laptops, tablets and other mobile devices.

The page layout is optimized for small screens on mobile devices. This depends on the device's resolution and is determined whenever Helpdesk online is accessed.

Helpdesk online starts with the logon page unless users are already logged on or use a logon link (see next section).

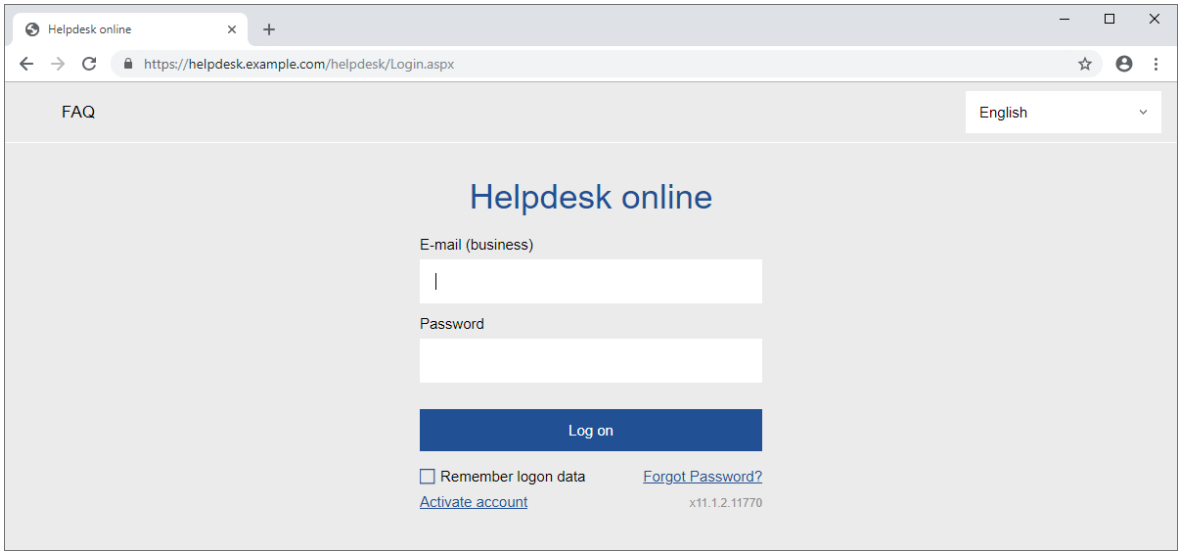
If you have selected additional languages in the **Helpdesk** area of the Management Console under **Notifications and languages** (see "11.2.7 Notification and languages" on page 178) and a CAS genesisWorld client with the required language resources is installed on the computer on which Helpdesk online runs, the user may also select the desired language here.

- If cookies are enabled and a secure connection (HTTPS) is used, the selected language will be saved in a cookie (see "10.3 Cookies" on page 128).
- If the user has already logged on and the language cookie is still present, the previous language selection will be retained.
- When a user first logs on or has deleted the language cookie, Helpdesk online will default to the browser language, English, the database language, or the first available language, in this order, depending on availability:
  - By default, the browser language will be selected.
  - If the browser language isn't available, English will be selected.
  - If English isn't available, the database language will be selected.
  - If the database language isn't available, the first available language will be selected.

## 10.5 Logging on, activating the account and logging off

Most Helpdesk online features require logging on.

- The FAQ search may be available without logging on:
  - You may enable this feature in the Management Console by selecting status options of FAQ items available without logging on (see "FAQ" on page 170).
- The following features require users to log on:
  - Personal area
  - Request lists and detail view
  - Actions (changing the status, commenting on tickets and uploading files)
  - Creating new requests




- As user name, the address field **E-mail (business)** will be requested by default. You may change this setting in the **Management Console** under **Helpdesk** > **Helpdesk online** (see "**User name**" on page 155).
- Users set their own **Password** when activating their accounts (see following page).

  Alternatively, you can enter a password for a company contact or individual contact in the **Details** tab (see "2.6 Setting up access for Helpdesk online" on page 37).

  Here you also select the contact's access level (**Helpdesk online**). If access hasn't been enabled, the contact will not be able to log on or activate the account.
- **Remember logon data:** Store the user name and password in a cookie (see "10.3 Cookies" on page 128).
  - The next time the user accesses Helpdesk online, he will be logged on automatically.
  - When the user logs off, the cookie will be preserved without the password. The next time the user accesses Helpdesk online, the user name will be entered automatically. The password must be reentered.
  - When the user unchecks the **Remember logon data** option and logs on again, the cookie will be deleted.
  - This feature requires that Helpdesk online internally uses an HTTPS connection in IIS.
- **Forgot your password:** Here users enter their e-mail address to receive an e-mail with a link for resetting their password. If the e-mail address can be assigned to an address with access to Helpdesk online in CAS genesisWorld, the user will receive this e-mail.

  Users will also receive a confirmation e-mail after changing their password.

  To send the e-mails, the system e-mail account configured in the **Rules** area of the Management Console under **Server settings** will be used.

  If no system e-mail account has been configured, this feature won't be available.

## Note

The subject and content of the German e-mails for resetting the password and notifying users about the password change are stored in the `PasswordResetMail.tpl` and `PasswordChangedMail.tpl` files under `Config` in the installation directory for Helpdesk online. For all other supported languages, e-mail templates with the same name and the file extension for the respective language are stored in this directory (e.g., English versions `PasswordResetMail.tpl.en`, `PasswordChangedMail.tpl.en`).

Please do not directly edit these files. If you wish to make changes, copy the files to the `.\Custom` folder in the Helpdesk online installation directory and make the desired changes to the copies. If copies exist in the `.\Custom` folder, they will be used instead of the original files.

The e-mail templates use variables for the salutation (`@salutation@`) and the link for resetting the password (`@passwordresetlink@`) which should always be included in the e-mail templates.

- **Activate account:** Users whose account has been enabled without assigning a password can activate their account via the **Activate account** link.

  You can enable an account and select the desired access level via the **Helpdesk online** field in the **Details** tab of a company contact or individual contact (see "2.6 Setting up access for Helpdesk online" on page 37).

  Section "12.1 Helpdesk online account enabling notification" on page 195 describes setting up a notification rule for sending customers an activation link when their access is enabled by selecting an access level in the **Helpdesk online** field.

## Note

The subject and content of the German e-mails for activating the customer's account and for confirming the activation are stored in the `ActivationMail.tpl` and `AccountActivatedMail.tpl` files under `Config` in the installation directory for Helpdesk online. For all other supported languages, e-mail templates with the same name and the file extension for the respective language are stored in this directory (e.g., English versions `ActivationMail.tpl.en`, `AccountActivatedMail.tpl.en`).

Please do not directly edit these files. If you wish to make changes, copy the files to the `.\Custom` folder in the Helpdesk online installation directory and make the desired changes to the copies. If copies exist in the `.\Custom` folder, they will be used instead of the original files.

The e-mail templates use variables for the salutation (`@salutation@`) and the link for resetting the password (`@activationlink @`) which should always be included in the e-mail templates.

- **Blocked support entitlement:** Contacts of blocked companies as well as blocked single contacts will not be able to log on to Helpdesk online (see "2.5 Blocking support entitlement" on page 36).
- **Logging on automatically:** Users can skip the logon page and directly log on via the `AutoLogin.aspx` page using the `LoginField`, `PWField` and `Language` parameters (e.g., `https://helpdesk.example.com/Helpdesk/AutoLogin.aspx?LoginField=jack.bauer@nomosys.co.uk&PWField=cas&Language=en`).

  This page may also be called via POST.

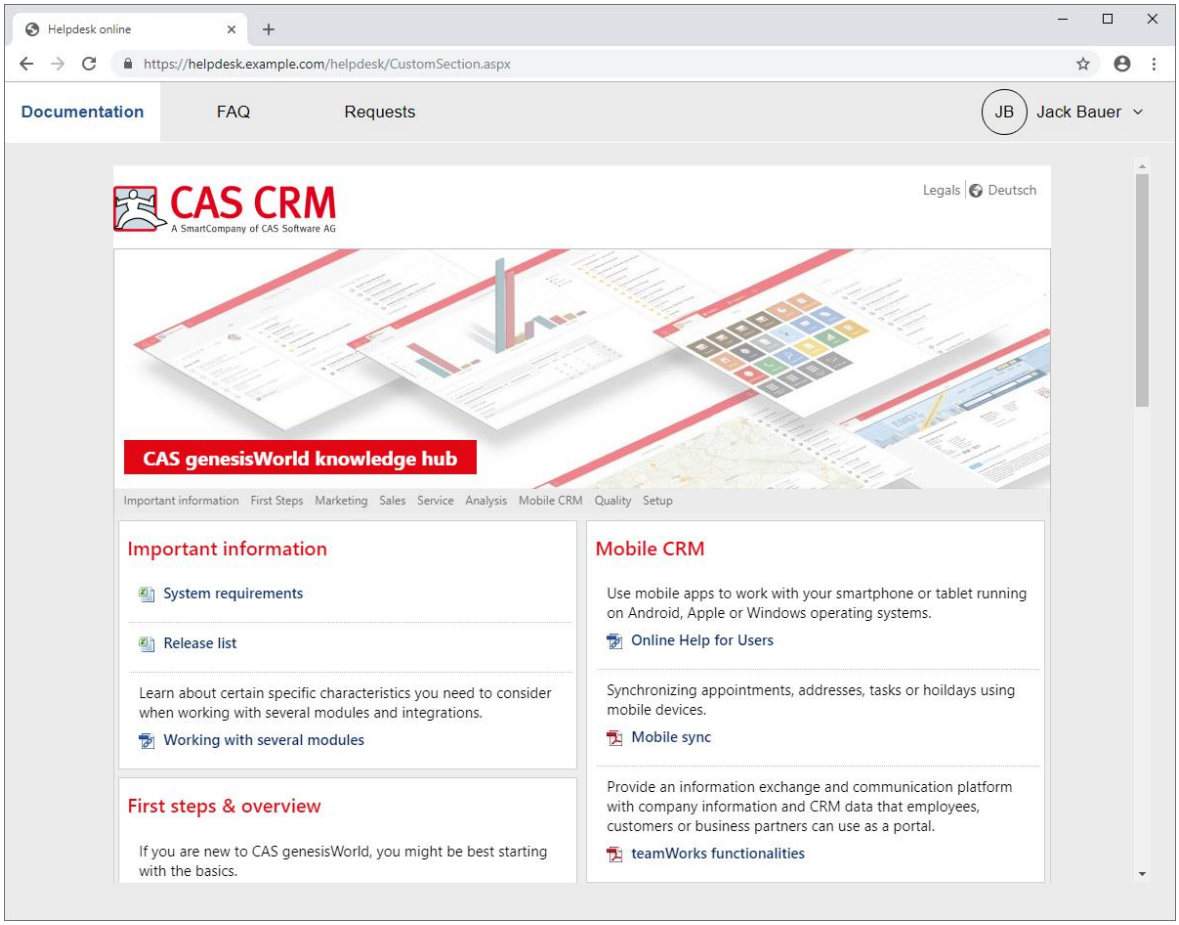
  - **LoginField:** user name, which is the contact's business e-mail address by default.
  - **PWField:** password, stored in the contact's **Password** field.
  - **Language:** two letter ISO Code of any enabled language (see page 129).
- **Logging off:** After successfully logging on, the user menu in the upper right corner will be added to the navigation bar at the top. Users can log off via the user menu.

  To work with Helpdesk online again, a user must log on again, even if the **Remember logon data** option has been selected. You can find more features of the user menu under "10.11 User menu" on page 144.

## 10.6 Personal area

If you have entered a title and URL for a personal area in the Management Console under **Helpdesk** > **Helpdesk online** > **Personal area**, it will be displayed as the first or last item in the navigation, depending on your settings.

This way, for instance, you can include an internet page with information about handling problems or links to a user documentation.

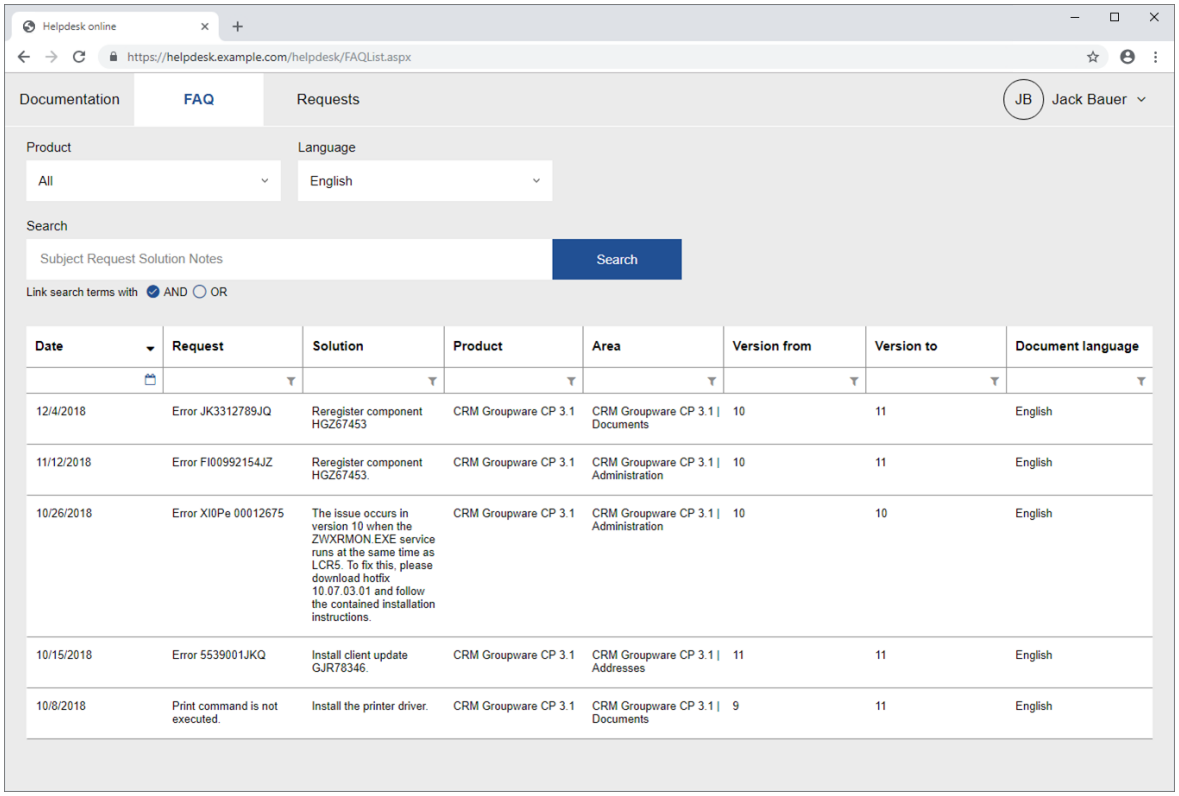



With the **Use as start page after logon** option, the personal area will be displayed first.

Without this option, the page will be displayed last (see "Personal area" on page 172).

## 10.7 FAQ search

If the FAQ search has been activated in the Management Console, users may open it by clicking on the **FAQ** button in the navigation menu. Depending on your settings, the FAQ search may also be available without logging in to Helpdesk online.




In the **Helpdesk** area of the Management Console, under **Helpdesk online** > **FAQ**, you determine the following FAQ search settings (see "FAQ" on page 170).

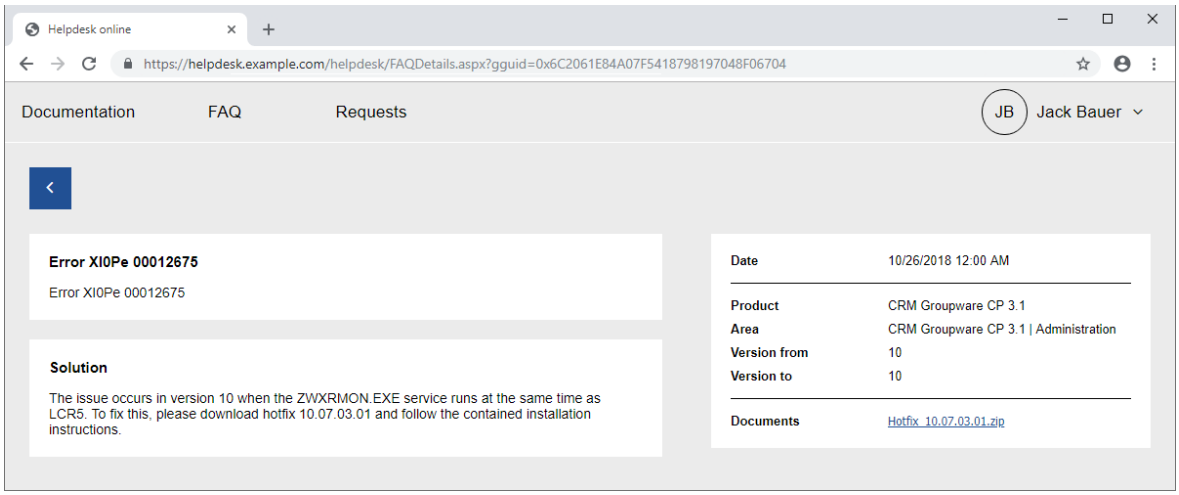
- **Status options** for displaying the FAQ search with or without logging in
- **Search fields** with option to limit them in Helpdesk online
- **Display fields** and default sorting for the result list
- **Date field format:** only date or date and time
- **Number of items when opening the FAQ search:** You may configure the FAQ search to display the FAQ documents with the latest **Date** when it is opened.
- **Number of results per page when searching**
- **Allow filtering in columns:** When a search term is entered in the **Filter** field above a column, the result list will only display items where the search term matches in this column.
- **Allow grouping:** When a column header is dragged into the grouping area above the result list, this column will be grouped by the items in the associated column. Dragging the column header back into the result list will remove the grouping.

- **Show language selection (language filter):** Multiple selection of languages entered in the **Document language** field of available FAQ documents. The **No language** item will also be available for displaying FAQ documents without a **Document language**. Via **Select all**, users may select all languages and the **No language** option.

The following features are available for searching and in the result list:

- **Select a product, product version and feature area:** When a product is selected, menus for entering the version and area will appear. The selection of a product, version and area limit the search results. If the user doesn't select a product, FAQ documents for all products will be found. If he selects a product but neither a version nor an area, FAQ documents for all versions and areas of the selected product will be found.
- **Link search terms with:** Here the user selects whether all (**AND**) or at least one (**OR**) of the entered search terms must appear in the sought document.
- **Search:** Here the user enters his search terms. If set up accordingly, he may also select which fields to search. When you are searching with **AND**, only entries in which each of the search terms appears in one of the searched fields will be found. When you are searching with **OR**, all entries in which a search term appears in one of the search fields will be found. The percent character % serves as a placeholder for a character string of arbitrary length. The placeholder character will automatically be inserted at the beginning and end of each search term. This way, search terms which are not whole words will also be found.

  If the user doesn't enter a search term, all FAQ documents with a status configured for display will be found. To display all FAQ documents for a given product, version or area, the user enters the desired selection with the associated menus and leaves the search field blank.
- **Opening the FAQ detail view:** Clicking on an item in the result list will open the associated detail view:




- **Opening or downloading files:** If a file has been stored with an FAQ document, users can open or download it by clicking on the link under **Documents** at the lower right.

## Sending links for opening an FAQ item

The `FAQDetails.aspx` page can also be opened directly via the following links in order to display a specific FAQ document.

```
https://helpdesk.example.com/Helpdesk/FAQDetails.aspx?gguid={gguid}
```

```
https://helpdesk.example.com/Helpdesk/FAQDetails.aspx?faqnumber={docnumber}
```

Replace `https://helpdesk.example.com/Helpdesk/` by your Helpdesk online system URL. Replace `{gguid}` or `{docnumber}` by the associated field value.

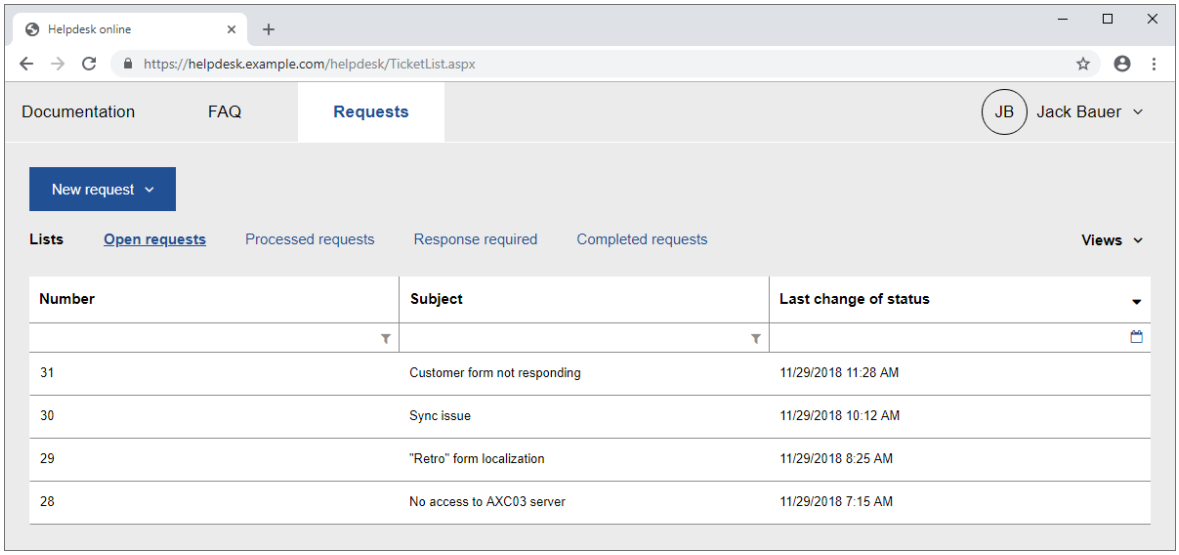
Helpdesk online supports both formats (with GGUID and docnumber).

If you wish to use the notification and action service to notify users about newly created or modified FAQ documents, only the first of the two links listed above will work. Other than inserting the URL of your Helpdesk online installation, the link may be typed in as listed above, with the `{gguid}` variable, including the curly brackets.

Please also regard the instructions for setting up notifications in section "12 Notification and support account" on page 195.

## 10.8 Request lists

After logging on, the first of the configured request lists opens. Via the lower navigation bar, users switch between request lists and change the list format




As long as users are logged on, they may access this view by clicking on the **Requests** button in the upper navigation bar.

The following features are available in request lists by default. Filtering and grouping can be turned off for each list in the configuration.

- **Sorting:** Clicking a column header will sort the list by entries in this column.
- **Filtering:** Entering a search term in the **Filter** field above a column will filter the list, so it only displays entries in which the search term appears in this column.
- **Grouping:** Clicking a column header, dragging it to the grouping area above the list and dropping it there will group the list by entries in this column. Dragging the column header back into the result list will remove the grouping.
- **Views**
  - **Submitter:** The access level specified for each contact in the **Details** tab determines whether the contact may see only his own requests, all requests from his company or all requests of all companies from the same company structure (see "2.6 Setting up access for Helpdesk online" on page 37). Via **Views** > **Submitter**, users may switch to lower access levels to hide requests from other companies or contacts.

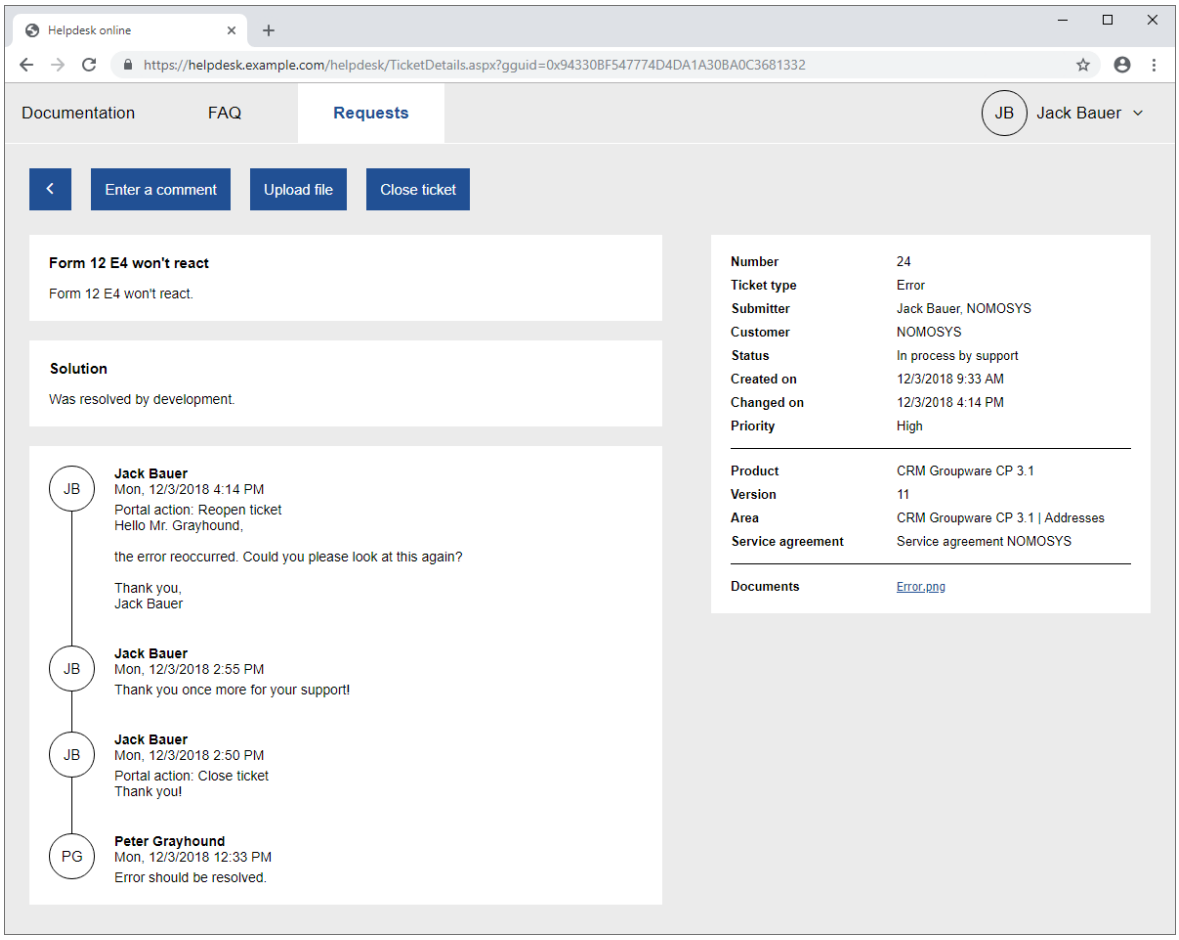
    Additionally, requests from any address linked to the user's address via the **Has ticket access** link will be displayed starting with the **All my company's requests** access level (see "11.3.5 Links" on page 185).

    This setting will be preserved via a cookie (see **UserSettings** on page 128).
  - **View:** Via **Views** > **View**, users may change the list format.

    All formats entered in the configuration of a list will be available for selection here.

## 10.9 Detail view and actions

Clicking a request's line in a request list opens the detail view.




The following information about a request is displayed here if the associated fields have been entered. Empty fields are not displayed in the detail view.

- **Request**, **Solution** and **Notes**
- **Number**
- **Ticket type**
- **Submitter** and **Customer**
- **Status**, **Created on**, **Changed on** and **Priority**
- **Product**, **Version** and **Area**
- **Service agreement**
- **Reference (Manufacturer)**, **Reference (Submitter)**
- **Documents:** All documents linked to the request are displayed here. Clicking on the associated button will open or download the file.

Clicking < will take the user back to the request list from which he opened the request.

Via actions, requests can be edited in the detail view.

Available actions will appear in the lower navigation bar.

An action can encompass the following steps.

- Enter a comment (will be written in the notes field with date and time.)
- Upload file(s) (will be linked to the request as documents and therefore appear in the dossier as well as in the request's detail view in Helpdesk online.)

  The maximum size is determined by the **Maximum size of archive documents** setting under **Miscellaneous** > **Documents** in the Management Console and may not exceed 2 GB. Additionally, the `MaxRequestLength` and `MaxAllowedContentLength` IIS settings are considered here. If either value is smaller than the maximum size of archive documents setting, the maximum size is equal to the smaller one.

  Trying to upload a larger file will display the maximum size.
- Change submitter
- Change product version
- Change priority
- Change field values of the request; for example, change the status to complete a request, reopen a completed request or record another change of status.

Each action will be written into the request's notes with a time stamp and the name of the portal user who has executed the action.

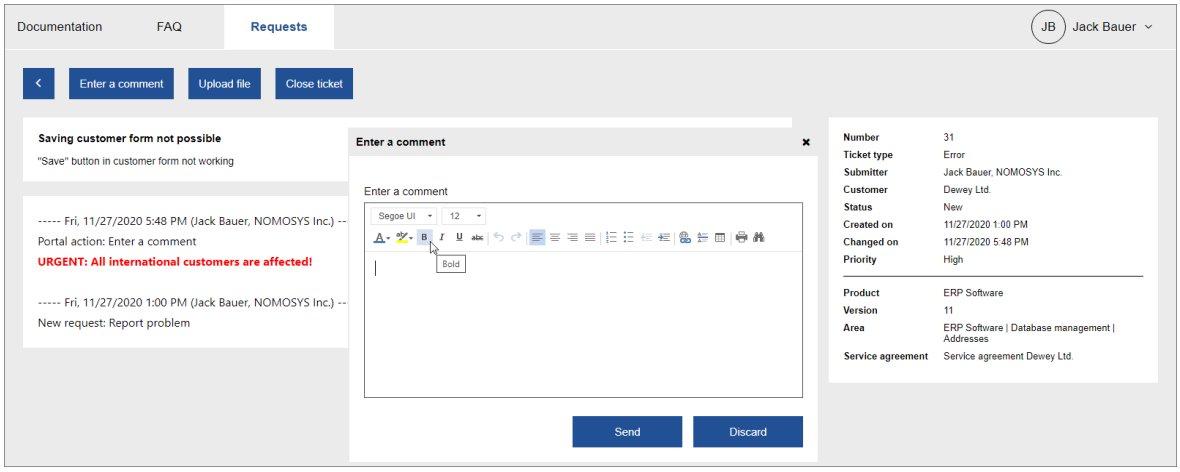
## Visualization of notes and editing of comments

In the Mangement Console, you select one of two modes for notes visualization and editing of comments (see „**Visualization of comments**“ on page 156):

- **As chat (default):** Formatting isn’t displayed and isn’t available when entering comments. The inidividual entries are visually grouped by author and point of time as dinstinguished by timestamps.

  An example of this display mode is shown on page 138.
- **As formatted content:** Formatting is displayed and is available when entering comments. The individual entries in the notes field are grouped by author and point of time via timestamps only.

  An example for this display mode is shown on page 140.




## Sending links for opening the detail view

The `TicketDetails.aspx` page can also be opened directly via the following links display a request, replacing `https://helpdesk.example.com/Helpdesk/` by your system's URL and `{gguid}` or `{tsknumber}` by the associated field value.

`https://helpdesk.example.com/Helpdesk/TicketDetails.aspx?gguid={gguid}`

`https://helpdesk.example.com/Helpdesk/TicketDetails.aspx?ticketnumber={tsknumber}`

You can embed links to a ticket's detail view in e-mails regarding this ticket sent via ticket actions or by the notification and action service. How exactly links are embedded differs:

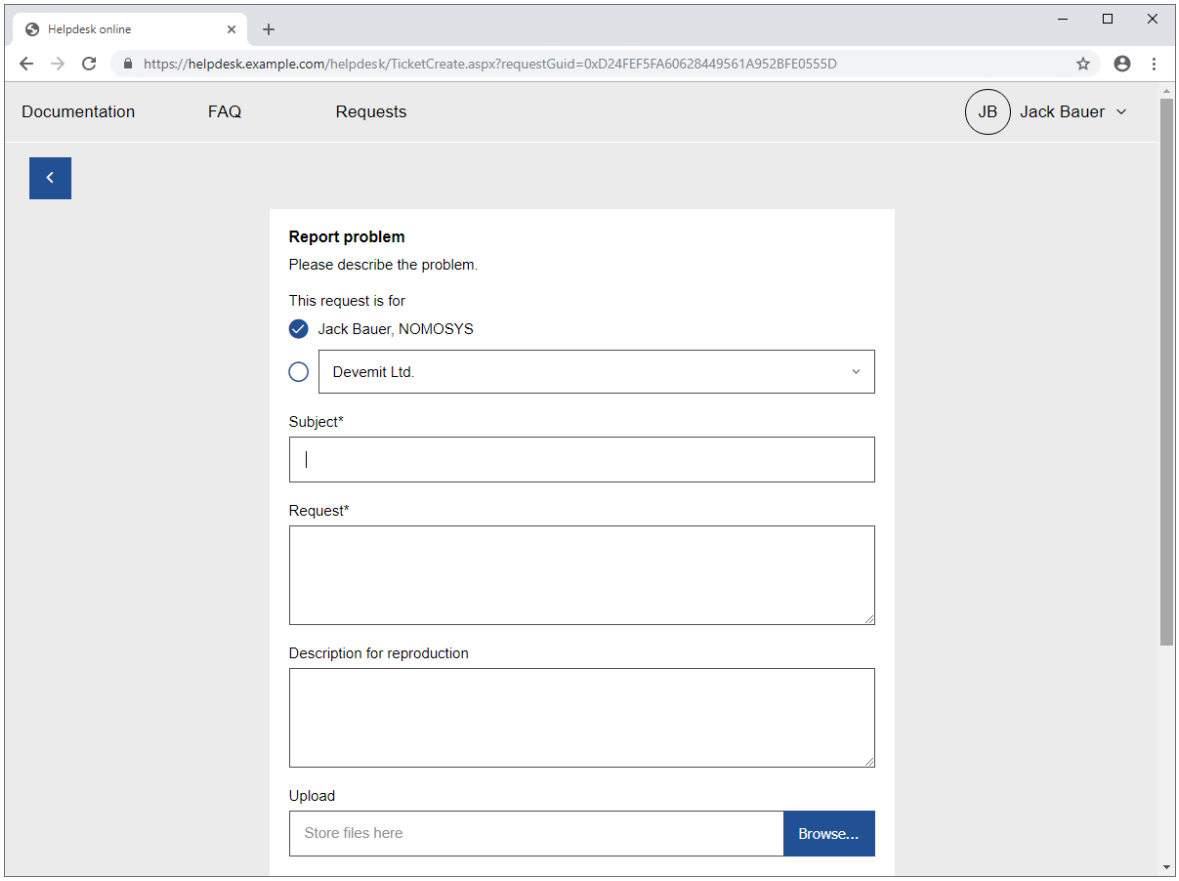
- **Ticket actions:** Here, separate variables for links to the detail view and request for feedback are available in the e-mail editor under **Response** (see "Edit e-mail" on page 31). This feature must be enabled by entering the link prefix in the **Helpdesk** area of the Management Console under **Helpdesk online** > **General** (see "Link" on page 155).
- **Notification and action service:** Here you must insert the links as hyperlinks into the e-mails to send using the `{gguid}` variable (written in this fashion including the curly brackets). The Notification and action service only supports the `{gguid}` variable. The `{tsknumber}` parameter isn't supported here (see "12 Notification and support account" on page 195).

## 10.10 Creating a request

When a request type is selected in the **New request** menu, a form opens for entering the new request of the selected request type. Exactly what can be entered here depends on the configuration of the request type. The following description includes optional entries.

### Note

> Users can filter any drop-down menus in the form like the customer, product and version selection by typing. Only menu options in which the entered search term appears will then be displayed.




- **This request is for:** Via the **Customer** link, supervised customers can be assigned to partners in CAS genesisWorld (company to company). All customers assigned to the user's company this way are available for selection here. Additionally, any addresses linked directly to the user's address via the **Has ticket access** link are available (see "11.3.5 Links" on page 185).

  Customers blocked for support are never available for selection (see "2.5 Blocking support entitlement" on page 36).

  The customer selection will only appear if activated for the selected request type.

- **Request information**
  - **Subject:** Corresponds to the job field of the same name and is always mandatory.
  - **Request:** Corresponds to the job field of the same name and is always mandatory.
  - **Additional information:** Per request type, you may configurte up to two additional fields without associated job fields. In the error report example, the **Reproduction instructions** field has been configured as additional information field. The contents of these fields will be written into the notes when the ticket is created.

    Optionally, you can set both fields as mandatory.

    Additionally, one of both fields allows formatting if you have enabled this feature in the Management Console (see page 158)
- **Upload files:** If configured accordingly in the request, users can upload files here.

  The maximum size is determined by the **Maximum size of archive documents** setting under **Miscellaneous** > **Documents** in the Management Console and may not exceed 2 GB. Additionally, the `MaxRequestLength` and `MaxAllowedContentLength` IIS settings are considered here. If either value is smaller than the maximum size of archive documents setting, the maximum size is equal to the smaller one.

  When trying to upload a larger file, the maximum admissible size will be displayed.
- **Product information**
  - All top level feature areas are available for selection as products in Helpdesk online. Additionnally, all subareas that have been linked with a product are available for selection as products (see "11.1 Settings in the Database area" on page 147).
  - With the **Display only my products** option, the **Product** menu will be filtered, such that only products for which the entered customer has an active product use will be available for selection (see "Start and end of maintenance" on page 58).

    This setting will be preserved via a cookie (see **UserSettings** on page 128).
  - When a product is selected, the **Version** and **Area** menus are displayed. Here users select the version in use and the affected feature area.
  - If there is at least one active product use for the selected customer and product, the **Product use** menu is displayed. If the selected customer has more than one active product use for the same product, the desired product use can be selected via the serial number. When a product use is selected, the version is entered automatically.
  - Request types with the **Display only product uses and area** setting require only the selection of a **Product** and **Area**, automatically selecting the appropriate **Version** and **Product use** (see "Requests" on page 156). With this setting, only products with existing product uses for the entered customer will be available for selection, such that customers without any product uses won't be able to select a product.
  - When the **Enter parent product in the "Product" field** option has been selected in the Management Console under **Helpdesk** > **General**, a product is also considered

as the customer's product if an active product use for another product which inherits the first product's versions exists for that customer. In this case, the **Product use** menu will also offer product uses for selection, whose products inherit the versions of the selected product.

- **Service agreement**
  - The service agreement can not directly be selected in Helpdesk online. Depending on your settings, it will be entered automatically or selected indirectly by the user via the product use.
  - If the **Select service agreement automatically** option has been selected in the Management Console under **Helpdesk** > **General**, an existing service agreement will always be selected automatically if there is exactly one service agreement which matches the associated filter which you also enter in the Management Console under **Helpdesk** > **General**. If no filter has been defined there, service agreements are filtered by Maintenance start and Maintenance end like product uses, where an empty date field always satisfies the associated condition. In the Management Console, under **Helpdesk** > **General**, you also specify whether the customer's or the submitter's service agreement should be used when both differ.
  - Regardless of the **Select service agreement automatically** option, when a product use is selected, the associated service agreement is also entered automatically. Like for automatic selection, service agreements are filtered. An existing service agreement is only selected if it matches the filter.
- **Priority:** Here users select the request's priority.

  When service agreements and response times are used, priority levels must be cleared in the service agreement to be available for selection. If submission permissions are also used and have been entered in the selected service agreeement, only priority which the user is permitted to submit will be available for selection.

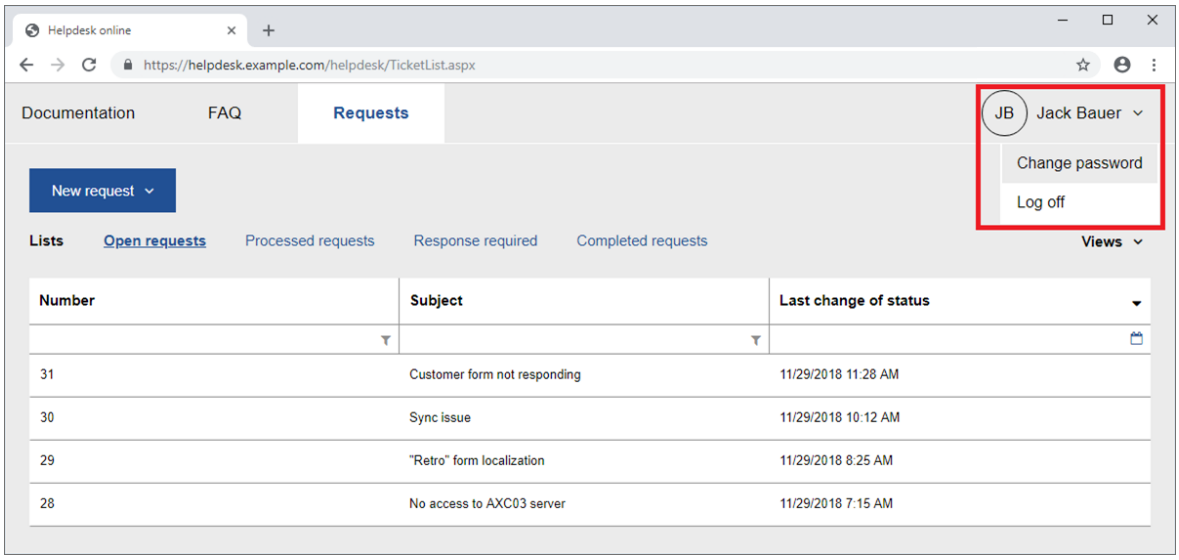
  If no service agreement has been selected and response times are used, all priority levels that have been cleared for requests without a service agreement under **Helpdesk** > **Service agreements** will be available for selection.
- The **Response time** depends on the priority and is taken from the selected service agreement. If no service agreement has been selected, the default response time for the selected priority for requests without a service agreement will be used.

  You enter it in the Management Console under **Helpdesk** > **Service agreements**.

  If the priority is displayed, the "Standard" suffix in the **Priority** field indicates that the default response time is used.
- **Reference (Submitter)** and **Reference (Manufacturer):** If the request has already been recorded in other ticket systems, users may enter the associated numbers here.

## 10.11 User menu

Clicking on the button labelled with the logged on user's name opens the user menu.




The following options are available here.

- **Change password:** Here the user changes his password.

  The minimum length will be checked if set in the Management Console (see "**Activate password guideline for portal users**" on page 155).

- **Log off:** Here the user logs off.

  To continue working with Helpdesk online, he must log on again.

  If the **Remember logon data** option has previously been selected, the user name will be retained in the associated cookie such that it may be automatically entered when the user accesses the logon page again.

  The encrypted password will be deleted from the cookie.

  In order to log on again, the user must reenter his password.

## 10.12 Modifying the appearance

The appearance of the individual Helpdesk online components is controlled via css files. You may find these in the `css` subdirectory of the installation directory of Helpdesk online (default `C:\Inetpub\wwwroot\Helpdesk\css`).

### Important notes for modifying the appearance

Please do not modify files in the `css` folder.

If you wish to modify the appearance of Helpdesk online, copy the css file(s) to modify to the `Custom` folder and modiy the copies as desired.

If a version of a css file is found in the `Custom` folder, it will be loaded in addition to the associated original file. All elements defined in the css file in the `Custom` folder will be loaded instead of the elements of the same name in the original file. Elements that haven't been defined in the `Custom` file will still be loaded from the original file. If desired, you can delete unmodified elements from the copies.

When you update to a more recent version of Helpdesk online, the contents of the `Custom` folder will be retained without changes.

If the css files shipped by default should ever change due to an update, changes will only be adopted for elements that aren't overwritten by css files in the `Custom` folder.

Please note that the css files have changed with version x9.

Modifications you have created for older versions are no longer compatible with the new version and must be created again based on the new css files if required.

- **HelpdeskOnline.css:** basic layout and components
- **Login.css:** logon page
- **FAQList.css:** FAQ search
- **GridView.css:** request lists and FAQ list
- **DetailsView.css:** request and FAQ item detail views
- **TicketCreate.css:** new request form
- **Feedback.css:** request for feedback
- **PasswordReminder.css: Forgot password** page
- **ChangePassword.css: Change password** page

## 10.13 Log file

The log file for Helpdesk online is usually located in the following path on the computer on which the application is running:

- `C:\Windows\Temp\genesisWorld\itdesign\GWHelpdeskOnline.log`

# 11 Management Console settings

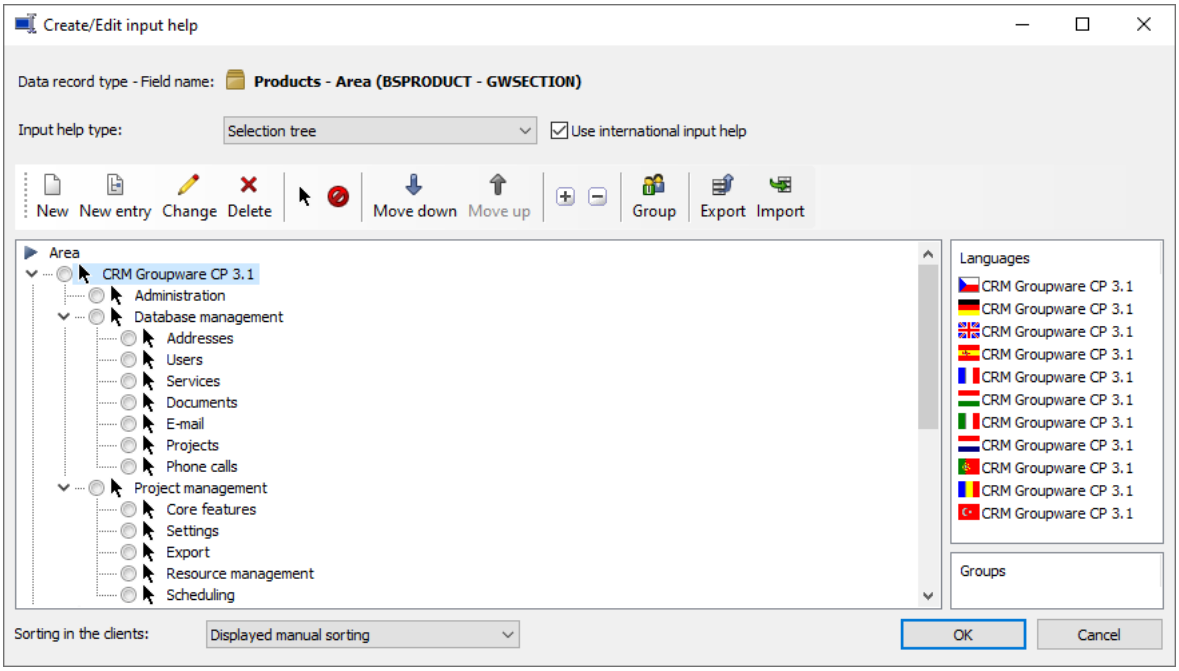
The following sections describe the Management Console settings for the Helpdesk module:



## 11.1 Settings in the Database area

In the **Database** area, you enter input helps for fields of requests (jobs) and other associated data records. Please note that the selection tree input help for the **Area** field of products is also used for requests (jobs) and FAQ items (documents).

However, the available input help items can only be edited under **Products**:




Via the **Area** field in the **General** tab of a product, you can assign a feature area to that product (see "5.1.1 General" on page 50). When you enter that area in a request or FAQ item, the product will also be entered automatically and vice versa.

Area product assignments will be be converted when updating from a version before x9.

In the **Database** area, you can also determine or change the types and status options used in Helpdesk for jobs (requests), projects, documents (FAQ items) and time records.

To do this, first select the required data record type in the left hand side list. Then select the **Type** or **Status** field and click on the **Input help** button.

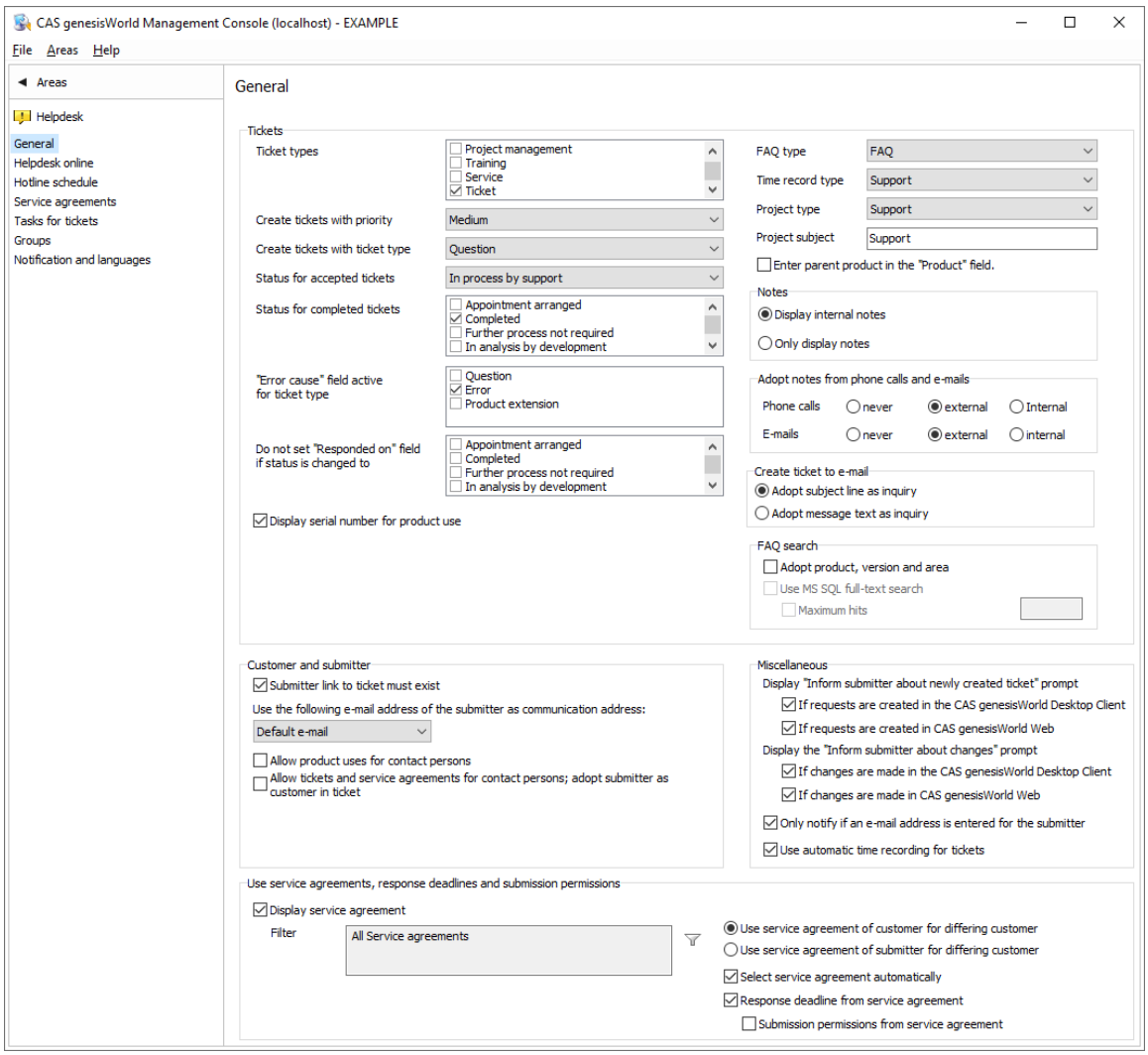
## 11.2 Settings in the Helpdesk area

The following sections describe the settings in the **Helpdesk** area:



### 11.2.1 General

Here you modify settings for tickets, for FAQ management, for notification, for time recording as well as for service agreements and product uses.



- **Tickets:** Here you specify default values for the ticket fields **Type**, **Priority**, **Ticket type** and **Status** as well as types for FAQ documents, support time records and projects. For support projects, you may also specify the subject prefix here.

  In addition, you make settings for the **Responded on** stamp, for ticket notes, for the FAQ search, for product uses and service agreements as well as for notifications and time records for tickets.

  You may edit the available options for all fields for which you may enter default values here in the **Database** module under **Jobs** (tickets), **Documents** (FAQ), **Time records** and **Projects** via the respective field list's **Input help** button.

  - **Ticket types:** Select here the job types to be used for tickets. When a ticket type is selected in a job, the **Ticket** tab is displayed in place of the **General** tab.

    In new tickets you create for other data records by clicking on the ticket icon, the first ticket type will automatically be selected.

  - **Create tickets with priority:** Select here the priority for new tickets.

  - **Create tickets with ticket type:** Select here the default value for the **Ticket type** field.

  - **Status for accepted tickets:** This status will be assigned to new tickets you create for other data records via the ticket icon.

  - **Status for completed tickets:** Select here the status to mark completed tickets.

  - **"Error cause" field active for ticket type:** In the default setting, the **Error cause** field displays the ticket type. Select here the ticket types for which an error cause may additionally be specified.

  - **Do not set the "Responded on" field if status is changed to:** In the default setting, a ticket's **Responded on** field will be set to the current point of time once the status is changed. In tickets created with an entry in the **Status** field, the **Responded on** field will be set directly when those tickets are created.

    Select here all status options whose assignment to a ticket is not supposed to create an entry in the **Responded on** field.

    For example, select the **New** status, if tickets created via Helpdesk online are created with this status in order to only set the **Responded on** field in such tickets when a support employee changes the status again.

  - **Display serial number for product use:** Here you control the display and storage format of the **Product use** ticket field in CAS genesisWorld Desktop and in CAS genesisWorld Web. In Helpdesk online, the serial number is displayed regardless of this option when selecting a product use. There, the new option only controls the storage format of the **Product use** field (with or without the serial number).

  - **FAQ type:** Select here the type for FAQ documents. When this type is selected in a document, the **FAQ** tab will be displayed instead of the **General** tab.

  - **Time record type:** Select here the type for time records in tickets.

- **Project type:** Select here the type for support projects under each of which all tickets for one customer will be collected.
- **Project subject:** Specify here the prefix for support projects' subjects. The customer company will also be written in the subject.
- **Enter parent product in the "Product" field:** With this option, when a product which adopts another product's versions is selected in a request, it is automatically replaced by the product whose versions it adopts.
- **Notes:** Here you specify whether the **Internal notes** field is available in tickets.
- **Adopt notes from phone calls and e-mails:** Here you determine whether, when a ticket is created for a phone call or an e-mail, the phone call notes or e-mail body will be transferred to the ticket's **Notes** or **Internal notes** field.
- **Create ticket to e-mail:** Here you determine whether creating a ticket for an e-mail will enter the e-mail's subject or body in the ticket's **Request** field. Regardless of this setting, the e-mail subject will always be transferred to the ticket's **Subject** field and the e-mail body will always be transferred to the ticket's **Notes** or **Internal notes** field (see previous setting).
- **FAQ search:** Here you modify FAQ search settings.

  Select **Adopt product, version and area** if these data should automatically be transferred to the FAQ search as a filter.

  Select **Use MS SQL full text search** to activate the full text search. When the SQL full text search is activated, it is initially assembled in the SQL server. All text fields in jobs and documents will be indexed. Depending on the number of data records to be indexed this may take up to several minutes.

  You can limit the number of hits for the purposes of accelerating search queries over large data pools with the **Maximum hits** setting. The number of hits will be displayed in the FAQ search. If more hits than the defined maximum were found, this is also indicated here.

- **Customer and submitter:** Here you make settings for the customer and submitter in a ticket as well as for the customer links in product uses and service agreements.
  - **Submitter link to ticket must exist:** Here you specify whether a ticket must be linked to a submitter. This option is selected by default, such that the submitter link is mandatory.

    Deactivate this option to allow creating tickets for e-mails which have no primary address because the sender is unknown.

    This applies to manual ticket creation as well as automatic creation via a support account (see "12.6 Setting up a support e-mail account" on page 218).
  - **Use the following e-mail address of the submitter as communication address:** For tickets created without a submitter for inbound e-mails sent to the support

account (see "12.6 Setting up a support e-mail account" on page 218), the sender's e-mail address will be stored in the **Communication** field.

Here you specify for tickets with a submitter link, from which address field the e-mail address should be entered in the ticket's **Communication** field.

The default setting is **Default e-mail** (as selected in the address). Alternatively, you may select an e-mail field.

- **Allow product uses for contact persons:** Here you specify whether product uses may only be created for companies or also for contact persons.

  This option is deactivated by default. In this case, every product use created for a contact person will automatically be assigned to the associated company.

- **Allow tickets and service contracts for contact persons; adopt submitter as customer in ticket:** Here you specify whether contact persons may be entered as customers in service agreements and tickets. With this setting, the submitter is also entered as customer when a ticket is created.

  This option is deactivated by default. This means that only companies may be entered as customers in service agreements and tickets.

- **Miscellaneous:** Here you configure the automatic notification of the submitter about tickets newly created or modified in the Desktop Client or Web Client as well as the automatic time recording.
  - Select **Display "Inform submitter about newly created ticket" prompt**, if a prompt for notification should appear when a new ticket is created in CAS genesisWorld ("Do you wish to inform the submitter about the newly created ticket automatically?")

    If a user confirms the prompt when creating a ticket, the **Notification change** option will be set in the ticket.

    When the prompt is disabled, the **Notification change** option will not be set in new tickets and submitters will never be notified about them automatically.

    To set up notification by the notification and action service, you must specify a rule reacting to newly created jobs with this option (see "12.3 Notifying the submitter about changes in a ticket" on page 205).

  - Select **Display "Inform submitter about changes" prompt** if users should be prompted to confirm the submitter's notification when the notes or solution field changes in a ticket ("You have changed the notes or solution field. Do you wish the submitter to be informed automatically about the change?")

    If a user confirms the prompt when he saves a ticket, the **Notification change** field in the ticket will change (the field will switch between **true** and **false** during changes).

In the Desktop Client, when the prompt is disabled, the **Notification change** field will be changed with each modification made to the **Notes** or **Solution** field in a ticket, triggering a notification if an according rule has been set up.

In the Web Client, no notification will ever be triggered without the prompt.

To set up notification by the notification and action service, you must specify a rule reacting to changes in this field in jobs (see "12.3 Notifying the submitter about changes in a ticket" on page 205).

- With the **Only notify if an e-mail address is entered for the submitter** option, if a change occurs that triggers an e-mail notification, the field **E-mail (business)** in the submitter's address will first be checked. If it is empty, a note will appear stating that no e-mail address has been entered. The ticket will not be marked for notification.

  If you turn the option off, the submitter's e-mail address will not be checked before a ticket is marked for notification. Changes about which the submitter could not be notified due to the lack of an e-mail address will appear in the action service's log.

- Select **Use automatic time recording for tickets** to display the stop watch in the top right corner of the **Ticket** tab. By clicking on the associated button the ticket is saved and closed and a time record is created for it.

- **Use service agreements, response deadlines and submission permissions:** Here you specify whether, and how, service agreements are used in ticket management.
  - **Display service agreement:** Here you specify whether the **Service agreement** field is displayed in the ticket.
  - **Filter for service agreements:** Here you specify filter conditions for the ticket's **Service agreement** field. The filter is also considered in Helpdesk online.

    If you don't specify a filter here, all service agreements available for the customer will be available for selection in the ticket form in CAS genesisWorld.

    Helpdesk online uses a default filter which will apply if you don't specify a filter here. A service agreement which is associated with a selected product use will then only be selected if it is already valid (**Start of maintenance >= "Today"**) and not yet expired (**End of maintenance < "Today"**). If either of these date fields is empty, the associated condition is also considered to be fulfilled. If both date fields are left blank in a service agreement, it is indefinitely valid.

  - **Use service agreement of customer for different customer:** With this setting, when the submitter doesn't belong to the same company as the customer, all service agreements of the customer will be available for selection.
  - **Use service agreement of submitter for different customer:** With this setting, when the submitter doesn't belong to the same company as the customer, all service agreements of the submitter's company as well as service agreements of associated contacts will be available for selection.

- **Select service agreement automatically:** With this option, whenever there is only service agreement available for selection in a ticket, it will be selected automatically.
- **Response deadline from service agreement:** Here you determine whether a response deadline depending on the priority will be displayed in tickets.

  With this option selected, the **Response time** tab will be displayed in service agreements. Here you can record response deadlines for tickets subject to the service agreement.  In addition, you may specify default values for tickets without a service agreement (see "11.2.4 Service agreements" on page 174.)
- **Submission permissions from service agreement:** Here you determine whether the selection of priority levels available in a ticket may be limited depending on the submitter via the service agreement.

  With this option selected, the **Contact persons** tab will be displayed in service agreements. Here you select contact persons entitled to submit tickets and assign to each contact person the priority levels with which he may submit tickets.

  In tickets for service agreements with submission permissions, only priority levels for which the submitter has been approved in the service agreement will be selectable.

  In tickets for service agreements for which no submission permissions have been entered, all priority levels are always available.

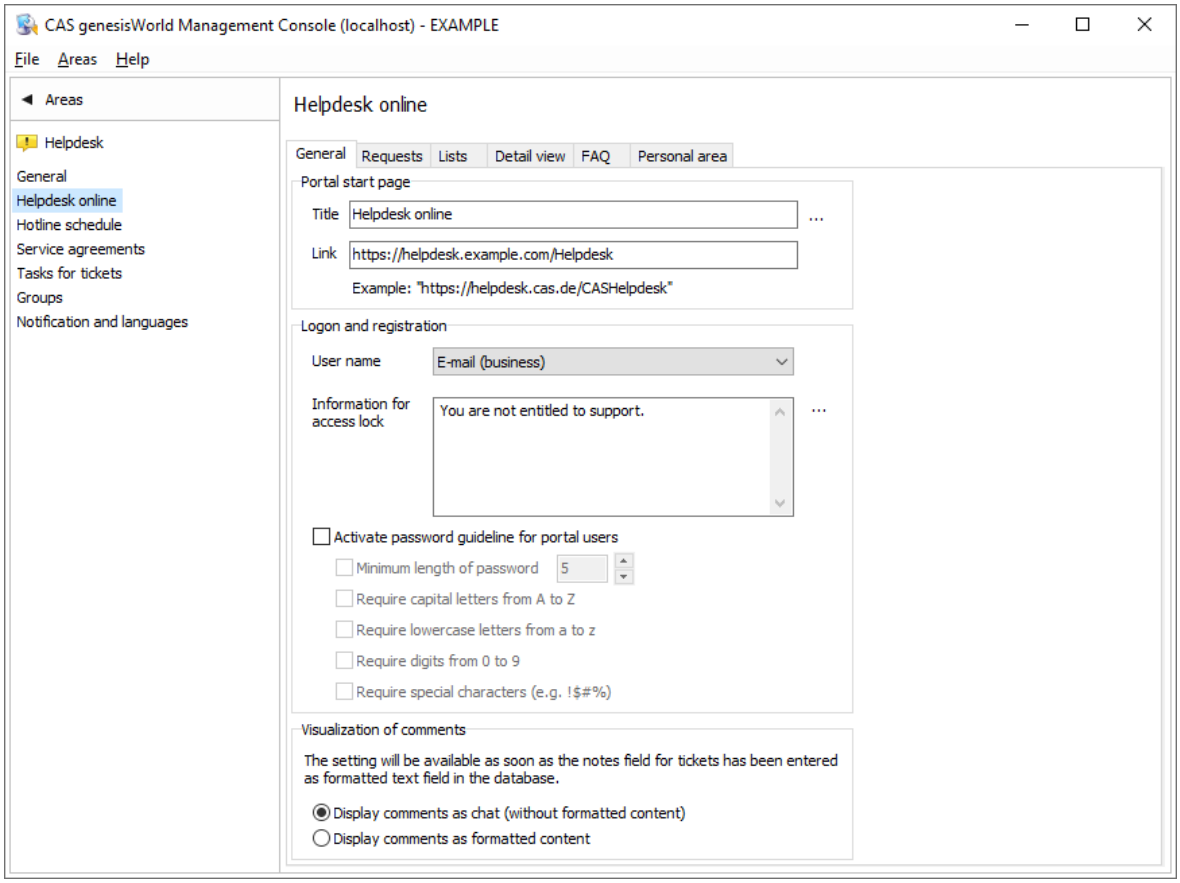
## 11.2.2 Helpdesk online

Here you modify settings for logging on, for new requests, for ticket actions, for request lists as well as for the FAQ search in Helpdesk online.


- General (page 154)
- Requests (page 156)
- Lists (page 166)
- Detail view (page 169)
- FAQ (page 170)
- Personal area (page 172)


### General

In the **General** tab, you specify the displayed name of the service portal and enter the link for the service portal in order to use variables for links to the detail view of a ticket or to the request for feedback page in ticket actions. Moreover, you make general settings for logging on to Helpdesk online.



- **Portal start page**
  - **Title:** Here you enter the title of the service portal to display on the logon page (default setting **Helpdesk online**).
  - **Link:** Here you enter the internet link to your Helpdesk online installation, if you wish to use the associated variables in e-mails for ticket actions (see "Subject and body" on page 32).
- **Logon and registration**
  - **User name:** Here you select an address field which serves as user name to log on to Helpdesk online.

    In the default setting, the **E-mail (business)** field is used.

    The field title is displayed on the logon page.

    You enter the associated password in the **Details** tab of the data record window for company contacts and individual contacts.

## Note

When a user logs on to Helpdesk online via the specified user name, addresses stored in CAS genesisWorld are searched for an entry in which the given user name is stored in the associated field and the password as well as the tickets to display are taken from that address.

Therefore, you should absolutely select a field as user name which stores only values unique to each address. Users with duplicate user names will not be able to log on.

  - **Information for access lock:** Enter here the note which appears if a contact who has been blocked for support tries to log on to Helpdesk online (see "2.5 Blocking support entitlement" on page 36).
  - **Activate password guideline for portal users:** Select this to activate password requirements, then select the desired requirements.
    - Minimum length
    - Require capital letters
    - Require lowercase letters
    - Require digits
    - Require special characters

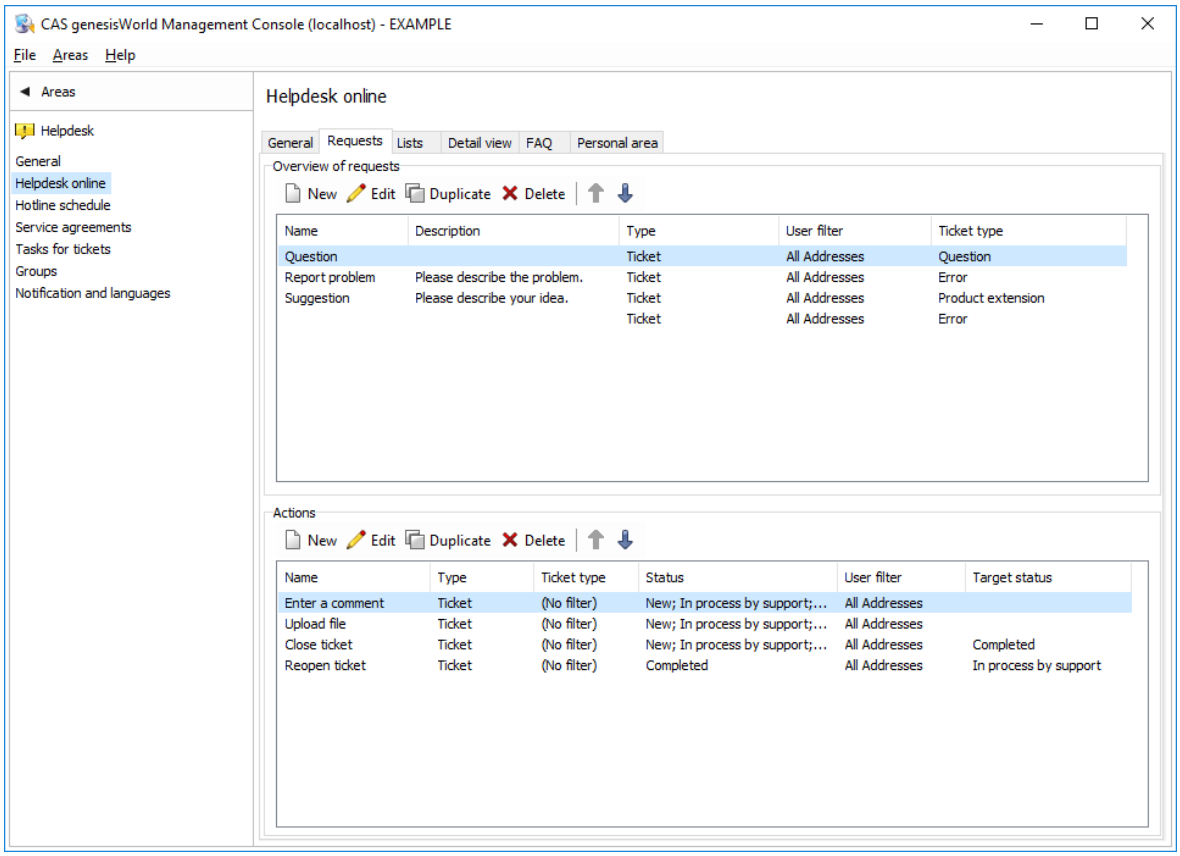
    This setting is regarded when setting or changing the password for an address in the CAS genesisWorld Desktop client as well as in Helpdesk online when customers set or change their own passwords.

- **Visualization of comments:** Here you control the edit and display mode for comments in Helpdesk online.
  - **Display comments as chat (without formatted content):** This is the default setting. With this setting, formatting in the **Notes** field won't be displayed in Helpdesk online and won't be available when entering comments. In this mode, the notes will be displayed in Helpdesk online with a graphical grouping by author and point of time.
  - **Display comments as formatted content:** This setting is available after selecting the **Allow formatting** option for the **Notes** field of **Jobs** in the **Database** area of the Management Console. In this mode, formatting in ticket notes will be displayed and available when entering comments in Helpdesk online.

    The graphical grouping by author and point of time isn't available in this mode. This information is given in the time stamp which is automatically inserted when someone enters a comment in Helpdesk online.

## Requests

In the **Requests** tab, you define different kinds of requests, each with an individual preselection of the most important ticket fields, as well as ticket actions available to users of Helpdesk online.



- **Requests:** In the upper list, you enter request types which will be available for selection in the **New request** menu in Helpdesk online. For each request type, you specify which entries the Helpdesk online user can make for it. You also enter preselections for other ticket fields that the user can't see or edit in Helpdesk online.

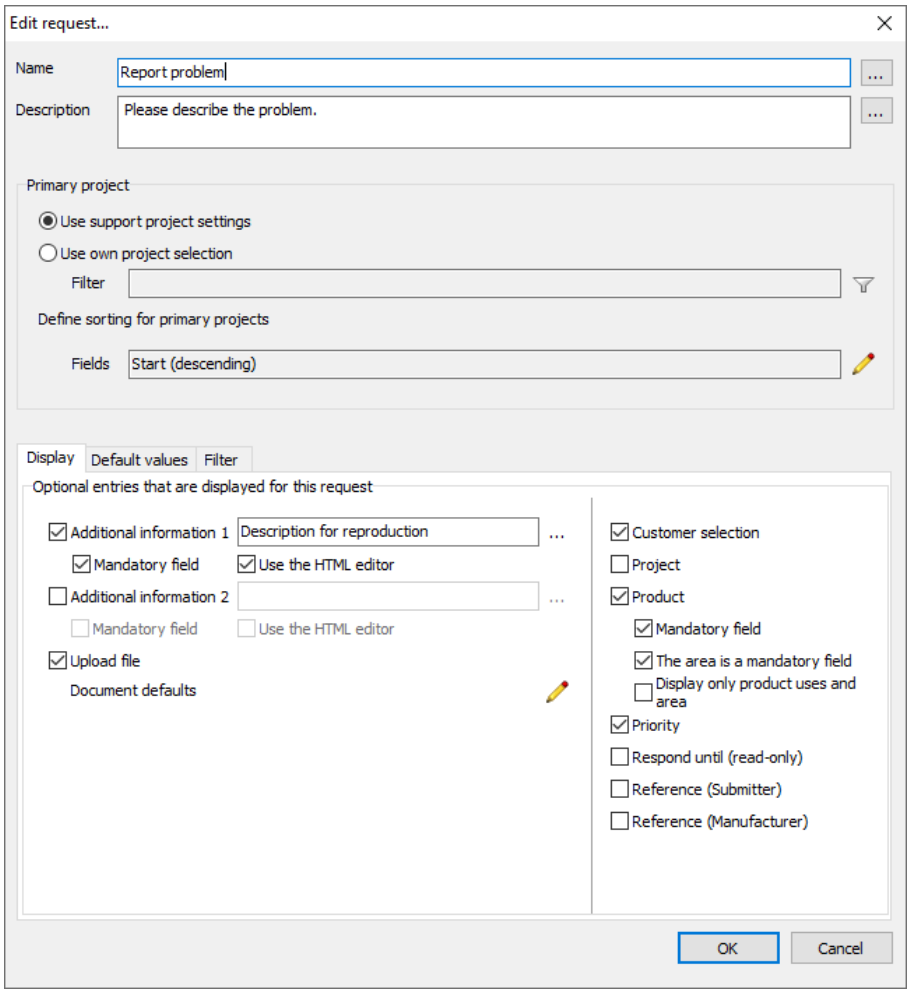
  **Create new request:** Here you create a new request type.

  **Edit request:** Here you edit the selected request type. Alternatively, you can open a request type for editing by double-clicking on the associated list entry.

  **Duplicate request:** Here you create a copy of the selected request type.

  **Delete request:** Here you delete the selected request type.

  **Edit order:** Use the arrow buttons to modify the order of request types. The request types are displayed in the same order in the **New request** menu in Helpdesk online.




  - **Name:** The request type is listed under this name in the **New request** menu in Helpdesk online.
  - **Description:** Enter here notes for the request type. The description is displayed in the header oft he associated online form when requests of this type are entered.

- **Primary project:** Specify here whether requests of the current type should be linked to the support project of the submitter's company (**Use support project settings**), or to another project linked to the submitter's company or one of its contacts (**Use own project selection**).
  - With the **Use own project selection** setting, all projects whose primary address is the submitter's company or an associated contact are added to the selection first. You can use the **Filter** to limit the selection, for example to only display projects whose end date is in the future or which have a certain type or status.
  - With the **Define sorting for primary projects** setting, you specify the order in which suitable projects are offered for selection in Helpdesk online. When the project selection is disabled for the current request type, the first project in the configured sorting is automatically entered.
- **Display:** The **Display** tab in the request type configuration offers optional entries and information for selection:
  - The **Additional information 1** and **2** fields serve for additional entries. They will be written into the ticket's notes field under the respective title defined here for requests of the current type.

    You may configure both of these fields as **Mandatory**.

    You may also **Use the HTML editor** for one of the two fields if formatting is allowed for the **Notes** field of jobs and has been enabled for comments in Helpdesk online in the **General** tab of the associated settings (see page 156).
  - With the **Upload file** option, you specify whether a file upload dialog should appear when a request is created. If desired, specify field values with which uploaded files should be created as documents in CAS genesisWorld under **Document defaults**. This way you ensure that the documents match the associated filter and will be displayed in Helpdesk online once uploaded.
  - With the **Customer selection** option, partners are offered all of their serviced customers for selection in addition to their own company when submitting a request. This requires that the companies of a partner's customers have been entered in CAS genesisWorld and are linked to the partner's company via the **Partner/Customer** link.
  - The **Project** option displays the project selection in the request. All projects defined under **Primary project** are offered for selection here. This option serves to enter project requests as opposed to support tickets. If you have set up requests of the current request type to be linked to the support project, this setting is usually not required because there is only one support project per submitting company.
  - Select the **Priority** option to allow the user to select a request's priority. Alternatively, you can specify the priority for new requests under **Default values**. If you activate selection of the priority in Helpdesk online under **Display** and also

specify the priority of new requests under **Default values**, the selected preselection will be entered in the **Priority** field in Helpdesk online when a request is entered.

When response times are used, the selection in the **Priority** field will be limited by the service agreement or by the default settings for tickets without a service agreement (see "**Priority**" on page 18).

- With the **Product** option, you activate the selection of a product and area.

  In Helpdesk online, all first level areas will be available for selection as products.

  Additionally, all subareas linked with a product in the Management Console will be available for selection as products (see "5.1.1 General" on page 50).

  You may also set each the **Product** and **Area** as a **Mandatory field** here.

  With the **Display only product uses and area** option, instead of selecting the product and version independently, both are selected via a product use.

  Please note that this setting requires that product uses have been entered for a customer in order to select a product in associated requests.

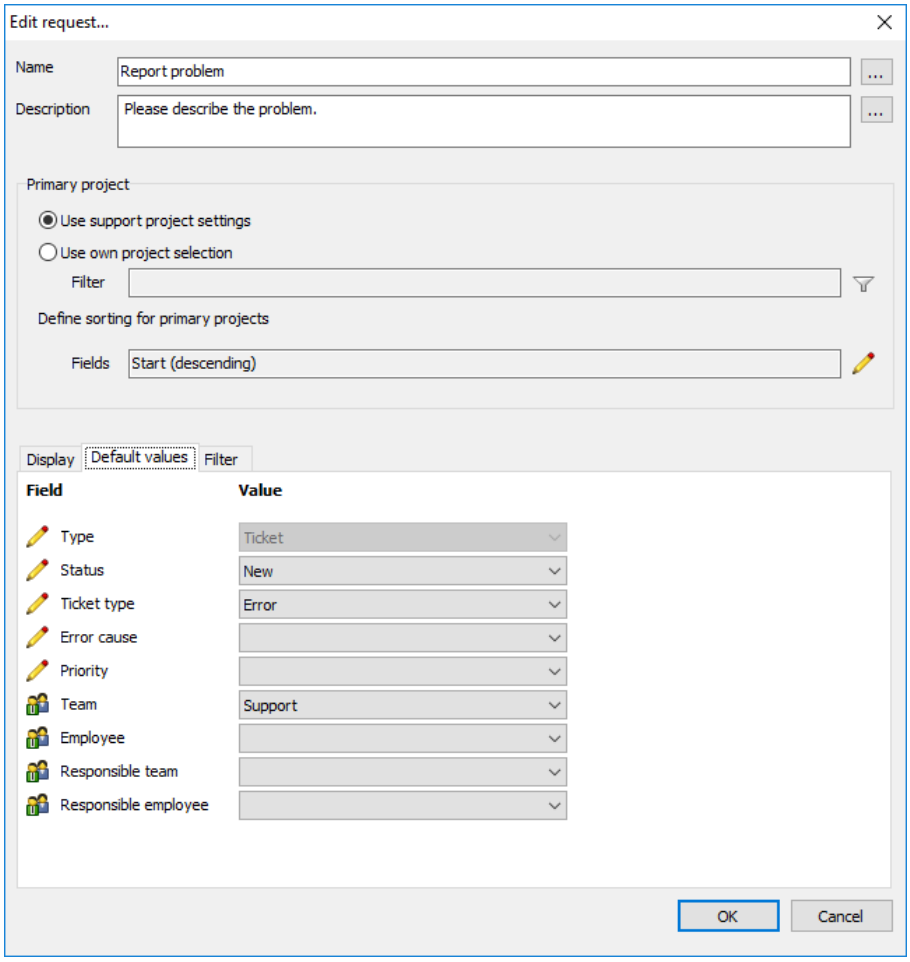
- When you have activated response deadlines under **Helpdesk** > **General** > **Use service agreements, response deadlines and submission permissions** in the Management Console, you may display the valid response deadline in the request with the **Respond until (read-only)** option.

  The response deadline depends on the priority and is taken from the selected service agreement.

  If no service agreement has been selected, the response deadline is taken from the default settings for tickets without a service agreement. This is indicated by the **(Standard)** suffix in the **Priority** field.

- The **Reference (Submitter)** and **Reference (Manufacturer)** fields serve to enter ticket numbers from the system of the submitter or manufacturer of the affected product. If, for example, a partner who operates an own Helpdesk system submits the request of a customer which he cannot solve on his own, he enters the ticket number from his system for reference in the **Reference (Submitter)** field.

- **Default values:** In the **Default values** tab, you select field values with which requests of the current type are created.




- You may only select a value in the **Type** field if multiple ticket types are used.

  This may be used to tell tickets creted via Helpdesk online from such submitted through other channels.

- You can use the entry in the **Status** field to tell new tickets created via Helpdesk online apart from tickets submitted through other channels.

  Specify a status which is only used in Helpdesk online for this (e.g., **New**).

  You may analyze the response duration by excluding this status from updates of the **Responded on** field (see "**Do not set the "Responded on" field if status is changed to**" on page 149).

- Specify the request type in the **Ticket type** field. In the default setting, only the **Question**, **Error** and **Improvement** items will be available for selection here.

  You may create further items in the **Database** area of the Management Console under **Jobs** as input help items for the **Ticket type** field.

- The **Error cause** field is available for selected items in the **Ticket type** field, in the default setting for the **Error** request type. Any other items in the **Ticket type** field will be repeated in the **Error cause** field, which can't be changed in this case.

- Enter the default priority for requests of the current type in the **Priority** field.

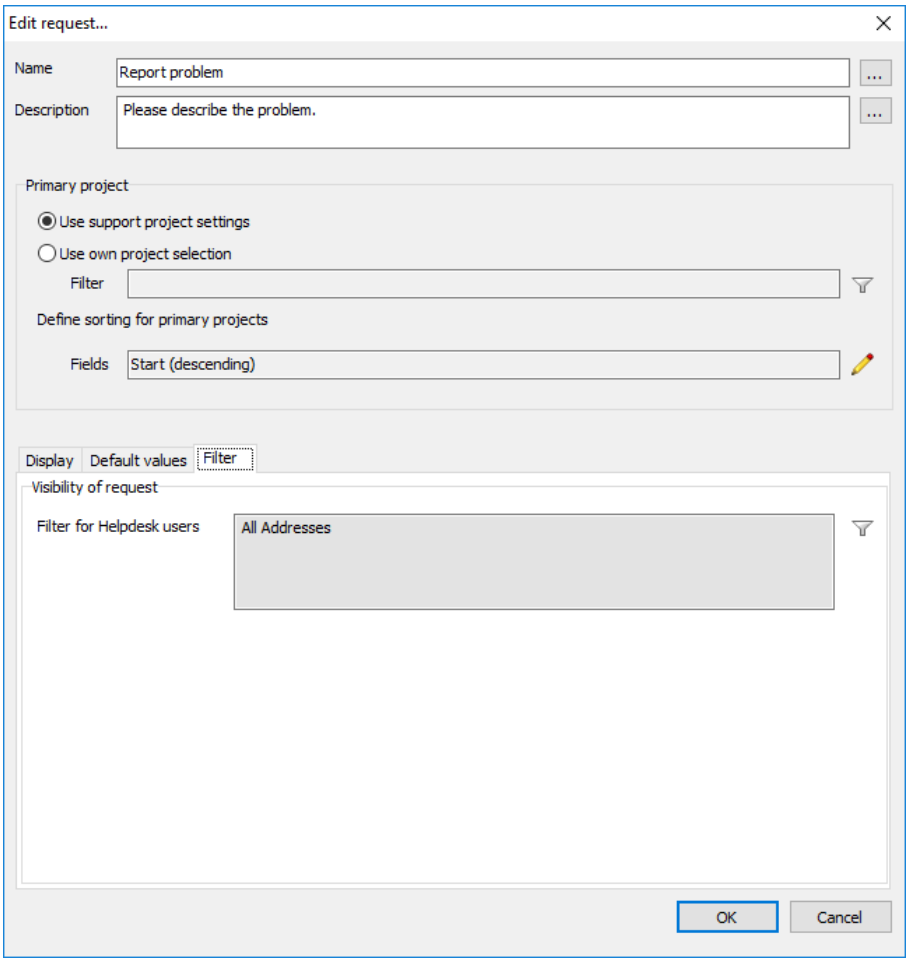
If you have selected the **Priority** option in the **Display** tab, you specify here the preselection of the **Priority** menu in the request.

When response times are used, the selection in the **Priority** field is limited by the service agreement or by the default settings for tickets without a service agreement (see "**Priority**" on page 18). Please note that not all values available here will always be available for selection in Helpdesk online as well in this case.

- The **Team**, **Employee**, **Responsible team** and **Responsible employee** fields serve to preselect the responsibility.

  Enter here groups and, if desired, users, responsible for new requests of the current type. Please note that if you select nothing here, tickets will be created with the **All (public)** entry in the **Participants** field and will thus be visible for all employees who have at least reading access to jobs.

- **Filter:** In the **Filter** tab, you may limit access to this request type by selecting users (addresses with access to Helpdesk online), for which it should be available via filter conditions. The request will then no longer be available for selection for other Helpdesk online users.



- **Actions:** In the lower list, you specify which actions will be available in a request's detail view in Helpdesk online. For each action, you specify via filters for which requests it will be available and enter changes in ticket fields made by the action. You also specify whether the user can enter a comment and upload a file when executing the action in Helpdesk online.

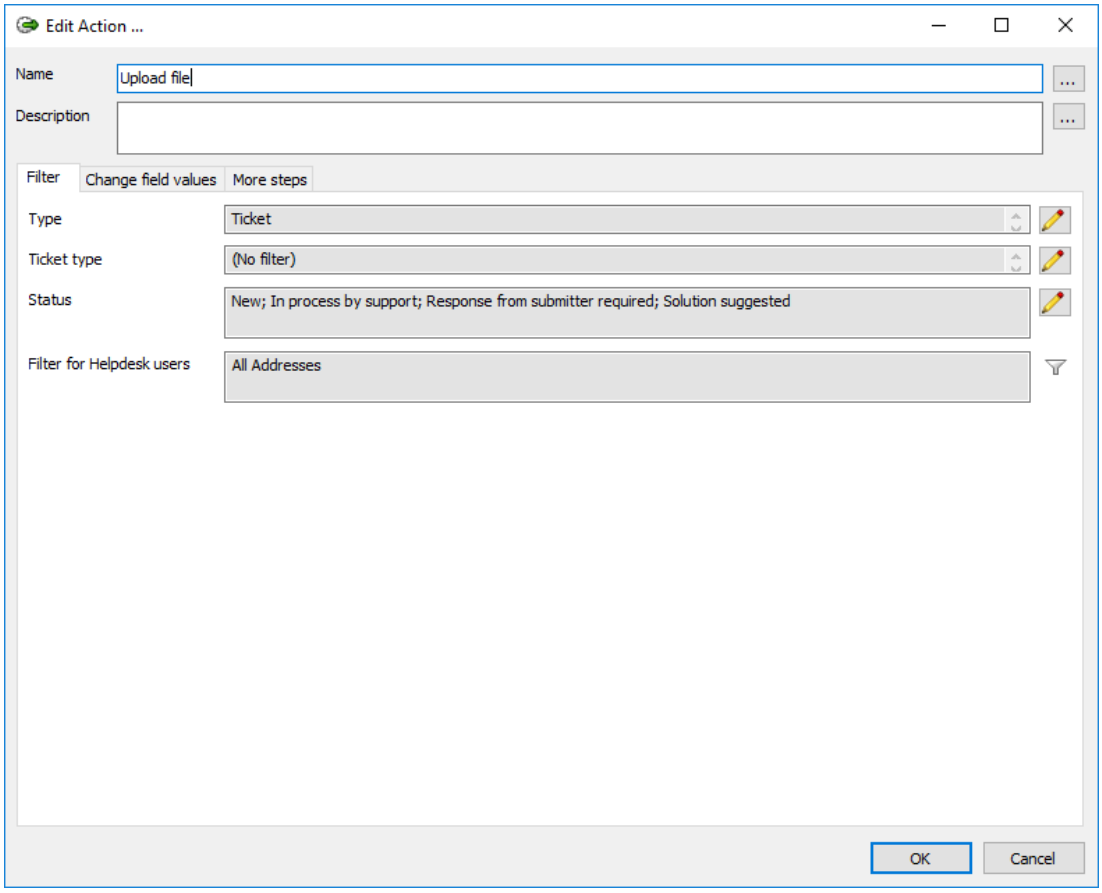
  **Create new action:** Here you create a new action.

  **Edit action:** Here you edit the selected action. Alternatively you can open an action for editing by double-clicking on the associated list entry.

  **Duplicate action:** Here you create a copy of the selected action.

  **Delete action:** Here you delete the selected action.

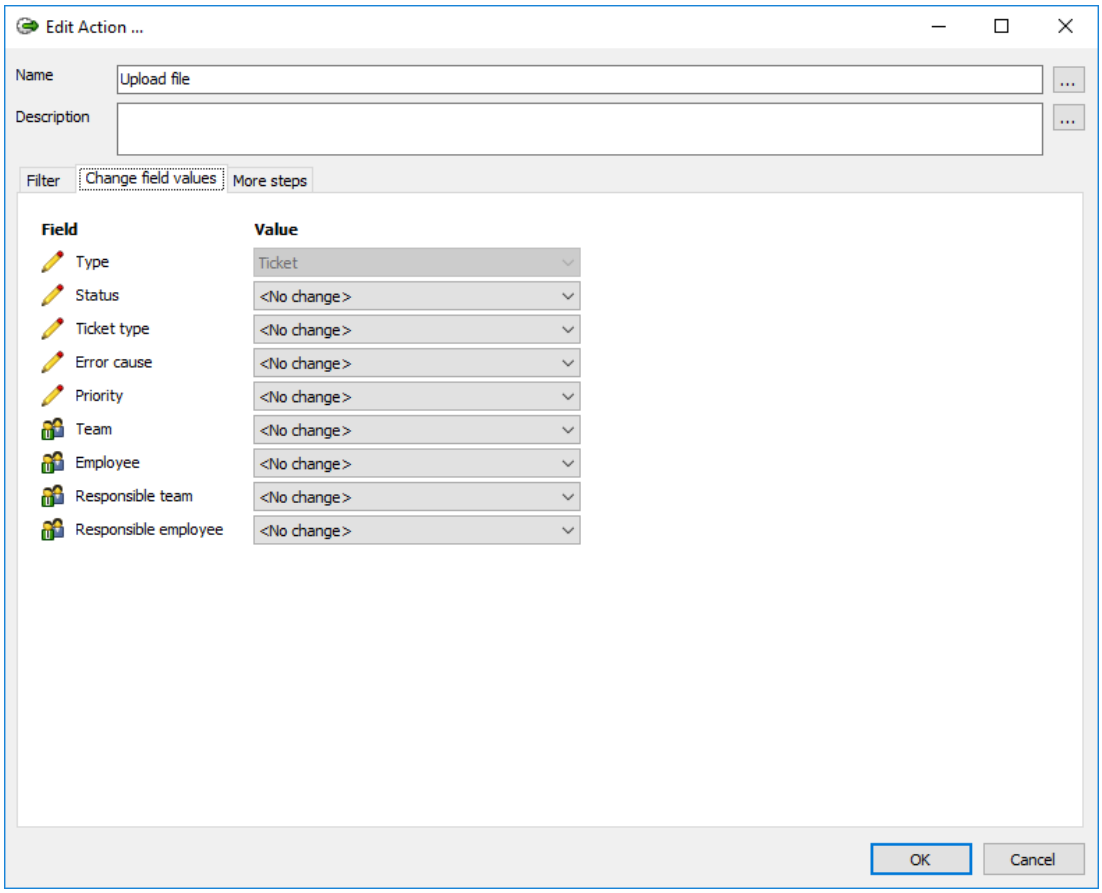
  **Change order:** Use the arrow buttons to modify the order of actions. The actions are displayed in the same order in a request's detail view in Helpdesk online.



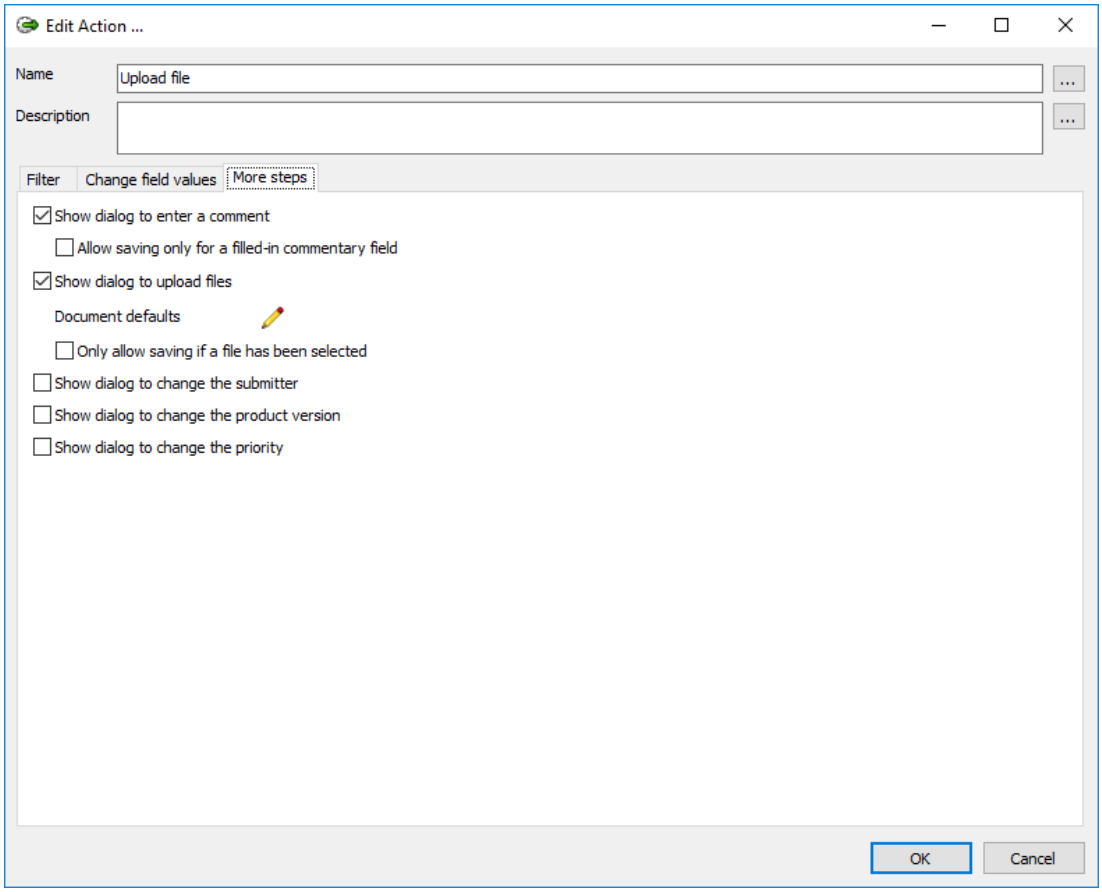

  - **Name:** The action will be listed under this name in a request's detail view in Helpdesk online.
  - **Description:** Enter notes for the action here. When the action is executed, the description will be displayed in the header of the associated online form.
  - **Filter:** Select here via entries of the **Type**, **Ticket type** and **Status** fields, for which requests the action is available. Via **Filter for Helpdesk users**, you may limit access to selected users (addresses with access to Helpdesk online).

- **Change field values:** Here you specify target values set by the action for each of the fields **Type**, **Status**, **Ticket type**, **Error cause**, **Priority**, **Team**, **Employee**, **Responsible team** and **Responsible employee**.

  Select the **<No change>** option for all fields that should not be changed by the action.



- **More steps:** Here you specify which entries the user can make when executing the action in Helpdesk online.




  - With the **Show dialog to enter a comment** option, the user can enter a comment when executing the action, which will then be written in the request's notes.

    Also select the **Allow saving only for a filled-in commentary field** option to make the comment mandatory.

  - With the **Show dialog to upload files** option, the user can upload an arbitrary number of files when executing the action, which will be stored as documents in CAS genesisWorld and linked with the request. If desired, specify field values with which uploaded files should be created as documents in CAS genesisWorld under **Document defaults**. This way you ensure that the documents match the associated filter and will be displayed in Helpdesk online once uploaded.

    Also select the **Only allow saving if a file has been selected** option to make the file upload mandatory.

  - With the **Show dialog to change the submitter** option, the user can change the request's submitter when executing the action. All active contacts of the logged on user's company will be available for selection.

- With the **Show dialog to change the product version** option, the user can change the product version when executing the action. For this, a product must have been specified in the request.
- With the **Show dialog to change the priority** option, the user can change the request's priority when executing the action. When response times are used, the selection in the **Priority** field is limited by the service agreement or by the default settings for tickets without a service agreement (see "**Priority**" on page 18).

  When submission permissions are also used, only priority levels which the logged on user is permitted to submit will be available for selection. Please note that not the submission permissions of the entered submitter but those of the logged on user are considered here.

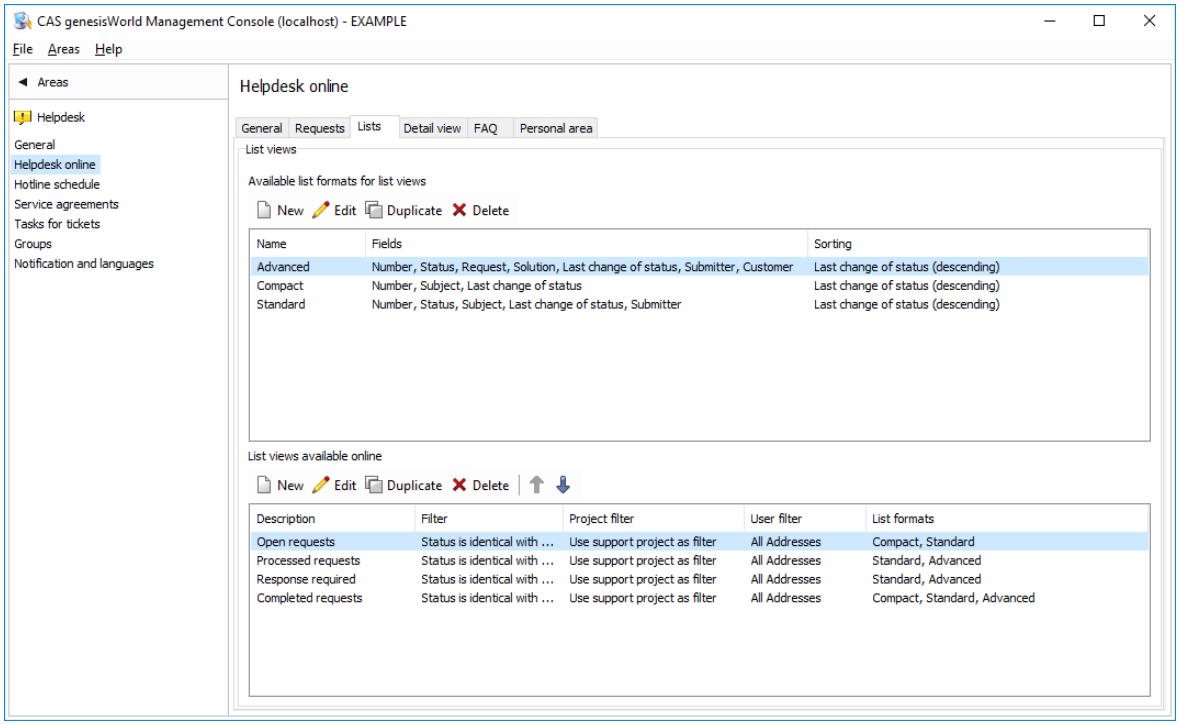
## Lists

In the **Lists** tab, you define list formats and list views.

List formats determine the selection of fields and sorting of the associated list. A list view can use one or more list formats. If more than one list format has been assigned to a list view, Helpdesk online users can switch between the available list formats when the list view is selected.

In the properties of a list view, you select the used list formats and determine, via a job filter, which tickets will be displayed.

Additionally, a project filter is available here in order to define project request lists. With the default setting for the project filter in a new list, **Use support project as filter**, only support tickets will be displayed.



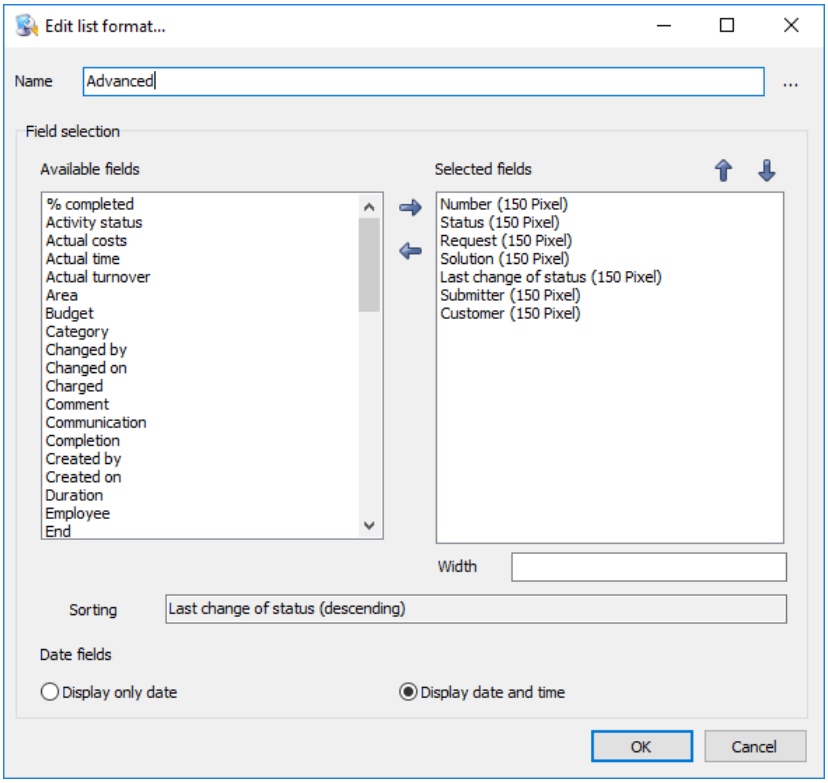

- **Available list formats for list views:** Here you define list formats, each of which specifies the selection of fields and sorting of the associated lists.

  **Create new list format:** Here you create a new list format.

  **Edit list format:** Here you edit the selected list format. Alternatively you open a list format for editing by double-clicking on the associated list entry.

  **Duplicate list format:** Here you copy the selected list format.

  **Delete list format:** Here you delete the selected list format.




- **Name:** Name the list format here. The name serves to assign the list format to lists and will be displayed in the list format menu in Helpdesk online if more than one list format has been assigned to a list.
- **Field selection:** Select the desired fields here. Use the arrow buttons above the **Selected fields** list to define the field order. Specify the desired width for each field in the **Width** field. Please note that these entries will be translated into relative values in Helpdesk online and the specified width can therefore differ from the actual value.
- Click on the **Sorting** button to select an arbitrary number of sorting fields. Note that sorting fields don't need to be visible. For each sorting field, you determine whether the sorting will be ascending or descending. Use the arrow buttons above the list of sorting fields in order to specify the sorting order.
- **Date fields:** Specify here whether date fields are displayed with only the date or with the time of day as well.

- **List views available online:** Here you define list views, the properties of which specify the tickets to display via a filter as well as the list formats to use.

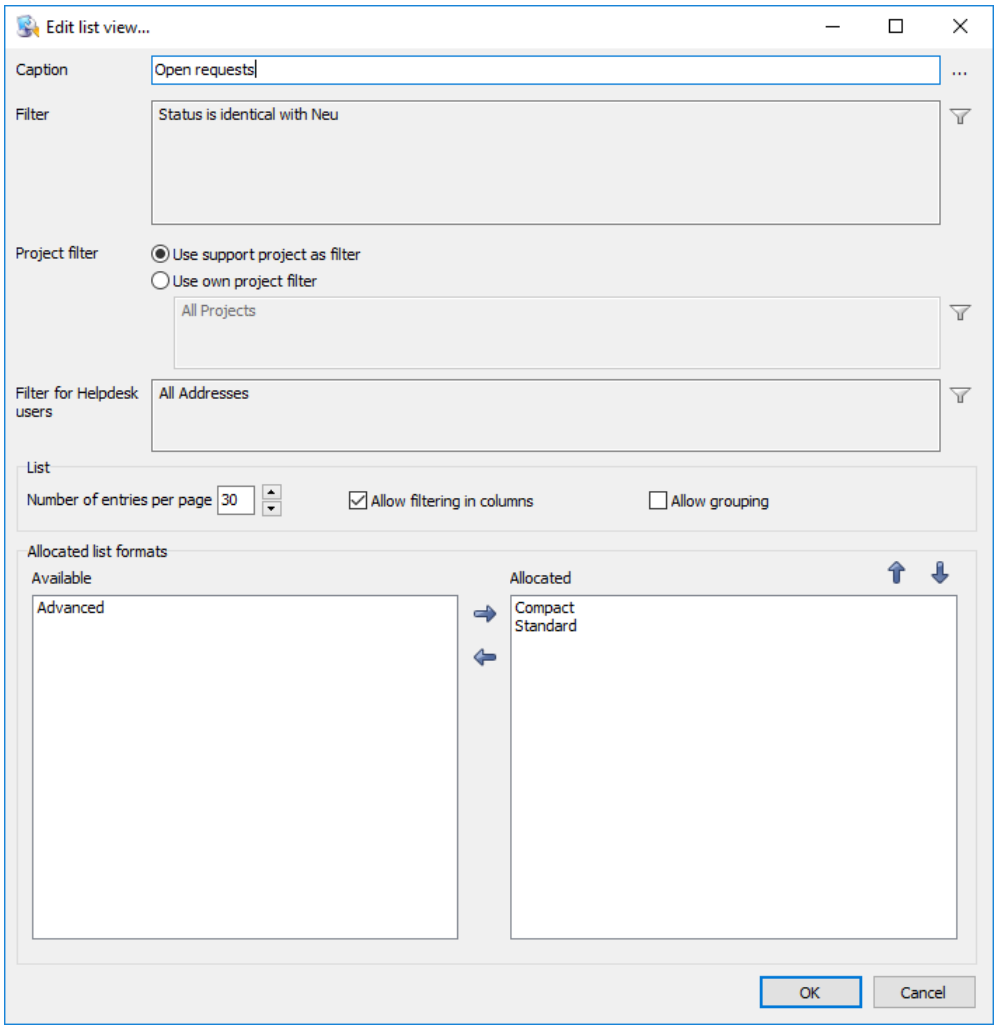
  **Create new list view:** Here you create a new list view.

  **Edit list view:** Here you edit the properties of the selected list view. Alternatively you open the properties of a list view by double-clicking on the associated list entry.

  **Duplicate list view:** Here you copy the selected list view.

  **Delete list view:** Here you delete the selected list view.

  **Change order:** Use the arrow buttons to modify the order of list views. The list views will be displayed in the same order in the navigation bar in Helpdesk online.

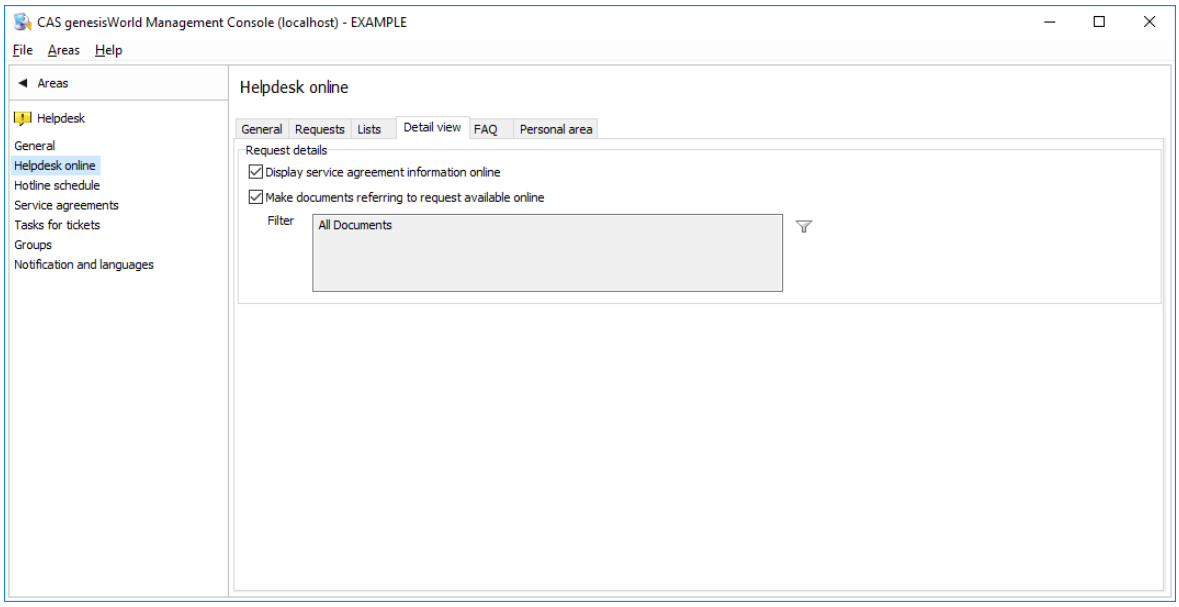



- **Caption:** Name the list view here. The list will be available for selection under this name in the navigation bar in Helpdesk online.
- **Filter:** Enter here filter conditions for the requests to display.
- **Project filter:** Lists with the default setting **Use support project as filter** display requests linked to a support project. Alternatively, you select projects for which requests should be displayed via filter conditions.

- **Filter for Helpdesk users:** Here you may limit access to this list to selected users (addresses with access to Helpdesk online).
- **List:** Here you specify how many entries will be displayed per page and whether users can filter and group in the list in Helpdesk online. Enter 0 in the **Number of entries per page** field in order to always load all entries.
- **Allocated list formats:** Here you select the list formats to use. If you have selected more than one list format, use the arrow buttons above the **Allocated** list to define the order in which list formats appear in the associated menu in Helpdesk online.

## Detail view

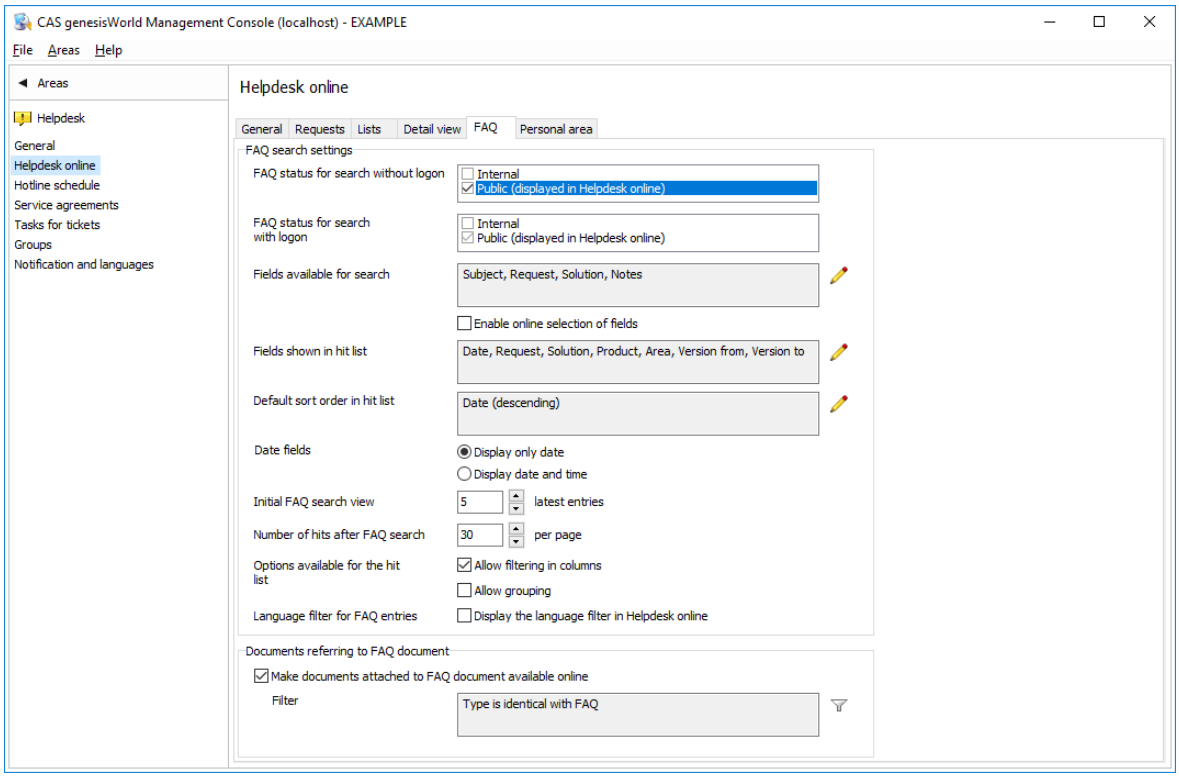
In the **Detail view** tab, you specify whether a service agreement, if linked to a request, should be displayed in the request's detail view and whether users may download associated documents in a request's detail view.




- **Display service agreement informationen online:** Determine here whether the detail view of a request should display the associated service agreement if there is one.
- **Make documents referring to requests available online:** Specify here whether documents linked to a request should be available for download in the request's detail view. Additionally you can define a filter to only make linked documents available if they match the filter conditions.

## FAQ

In the **FAQ** tab, you configure the FAQ search in Helpdesk online.




- **FAQ status for search without logon:** Here you determine, by selecting one or more status options, which FAQ documents will be available without logging on to Helpdesk online. If you do not select any status options here, the FAQ search will not be available without logging on.
- **FAQ status for search with logon:** Here you determine, by selecting one or more status options, which FAQ documents will be available after logging on to Helpdesk online. All status options selected under **FAQ status for search without logon** are automatically selected here as well. If you don't select any status options in either FAQ status selection box, the FAQ search will not be available at all in Helpdesk online.
- **Fields available for search:** Here you determine which fields of the FAQ documents are going to be searched.
  - **Enable online selection of fields:** Specify here whether users may select the fields to search in Helpdesk online.
- **Fields shown in hit list:** Here you select the fields with which FAQ documents will be displayed. Use the arrow buttons above the **Selected fields** list to specify the order. Enter the desired width for each field in the **Width** field.

  Please note that these entries will be translated into relative values in Helpdesk online and the specified width can therefore differ from the actual value.
- **Default sort order in hit list:** Here you select by which fields and in which order (ascending or descending) the FAQ list in Helpdesk online will be sorted by default.

- **Date fields:** Specify here whether date fields are displayed with only the date or with the time of day as well.
- **Initial FAQ search view:** Here you determine whether the latest FAQ documents will be displayed when opening the FAQ search.

  To this end, enter the desired number of FAQ documents to display. The FAQ documents with the newest entry in the **Date** field will be displayed.

  Select **0** if no FAQ entries should be displayed when opening the FAQ search.
- **Number of hits after FAQ search:** Specify here how many FAQ entries will be displayed at most after a search request. If less FAQ entries are found, only the found entries will be displayed.

  Select **0**, if all entries should always be displayed.
- **Options available for the hit list:** Here you determine whether users may filter and group in the result list of the FAQ search in Helpdesk online.
- **Language filter for FAQ entries:** Here you specify whether a language selection will be displayed for the result list of the FAQ search. With this, the list may be filtered by the **Document language** field of FAQ documents. The filter will be available regardless of whether the **Document language** field is actually displayed in the result list.
- **Documents referring to FAQ document:** Specify here whether documents linked to an FAQ document should be available for download in Helpdesk online. Additionally, you can define a filter in order to only make linked documents available which match the filter conditions.

## Personal area

In the **Personal area** tab, you can include any internet page as a separate section in the navigation of Helpdesk online. This way, you can display news of your company or a portal page like the CAS help page (http://hilfe.cas.de/index-en.html).

- To do this, enter a **Title** and **URL**.

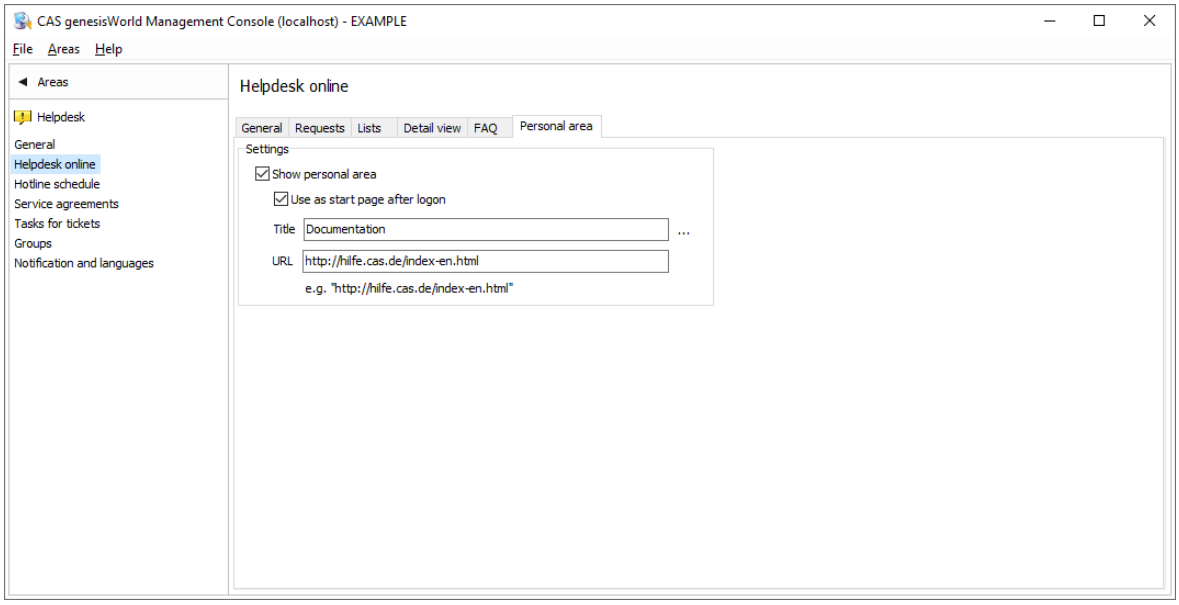
  You can enter the title in multiple languages via the button with the three dots.

  The URL can not be entered depending on the language.

- Select **Use as start page after logon** if Helpdesk online should start with this view.

  With this setting, the personal area will be the first section.

  Without this setting, it will be the last section.



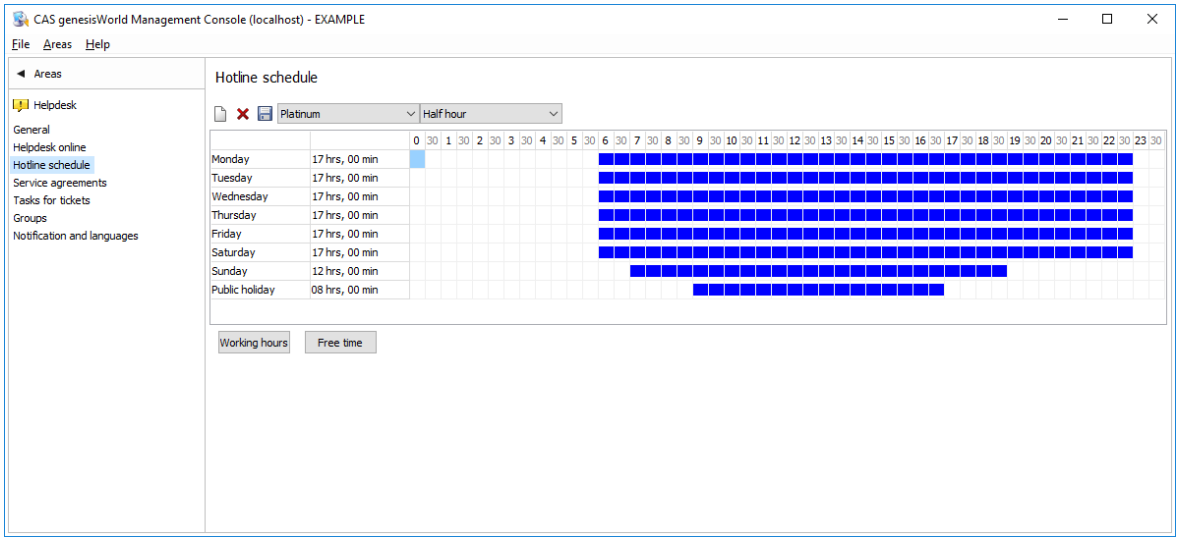
## 11.2.3 Hotline schedule

You enter hotline schedules for calculating response deadlines.

In a service agreement, you specify a hotline schedule for each priority level alongside the maximum response time. The actual deadline at which a response is due will be calculated from the duration and hotline schedule.

### Example

> A request is submitted on Friday at 16:30. A response deadline of one day and four hours is entered. With the hotline schedule displayed in the screen shot, a response is due Monday by 12:00.




**New:** Here you create a new hotline schedule. The new hotline schedule will automatically be selected to edit.

**Delete:** Here you delete the selected hotline schedule. You are asked for confirmation prior to deletion.

**Save:** Here you save the selected hotline schedule.

- **Select schedule:** If you work with different hotline schedules, select the desired hotline schedule in the left toolbar menu.
- **Change granularity:** In the right toolbar menu, you select the smallest distinguishable interval: quarter hours, half hours or hours.
- **Enter schedule:** Select a period with the mouse and click **Working hours** to signify support entitlement or click **Free time** to delete a marking you have entered.

## 11.2.4 Service agreements

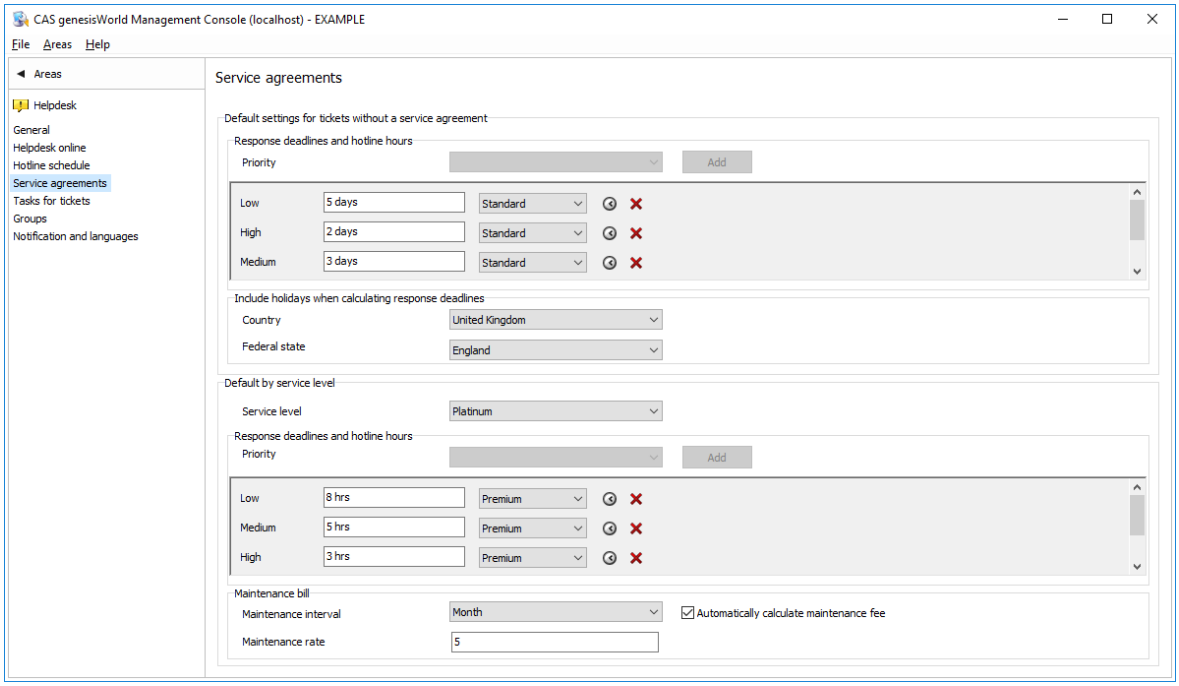
If you have selected the **Use response deadline** option under **Helpdesk** > **General**, you clear priority levels for requests without a service agreement and enter response deadlines and hotline hours for them here.

In this case, you also select here the country and federal state whose holidays should be regarded when calculating the response deadline for requests without a service agreement. These are also the default settings for new service agreements.

When response deadlines are used, you also preselect here the priority levels for new service agreements and enter presettings for response deadlines and hotline hours for them.

Regardless of the **Use response deadline** option, you enter here presettings for the **Maintenance rate** field in new service agreements depending on the **Maintenance interval** selected by the user in the service agreement. You also specify here whether the maintenance amount should automatically be calculated when a service agreement is opened.

You may enter different presettings for different kinds of service agreements, which you may distinguish via the **Service level** field.




- **Default settings for tickets without a service agreement:** Here you select available priority levels for tickets without a service agreement and enter response deadlines and hotline hours for the selected priority levels.
  - **Response deadlines and hotline hours:** To clear a priority level and enter a response deadline and hotline hours for it, select the desired priority level from the **Priority** menu and click **Add**. As in the service agreement's **Response times** tab, a separate row for entering the response deadline and hotline hours will be inserted.

Enter the maximum response time as well as the applicable hotline hours.

**Display hotline hours:** Here you open a view of the selected hotline hours.

**Remove priority level:** Here you remove the priority level from the selection. It will no longer be available for requests without a service agreement. You may clear the priority level again at a later time.

The entries for the job's **Priority** field are stored as input help items. You may edit it in the **Database** module of the Management Console.

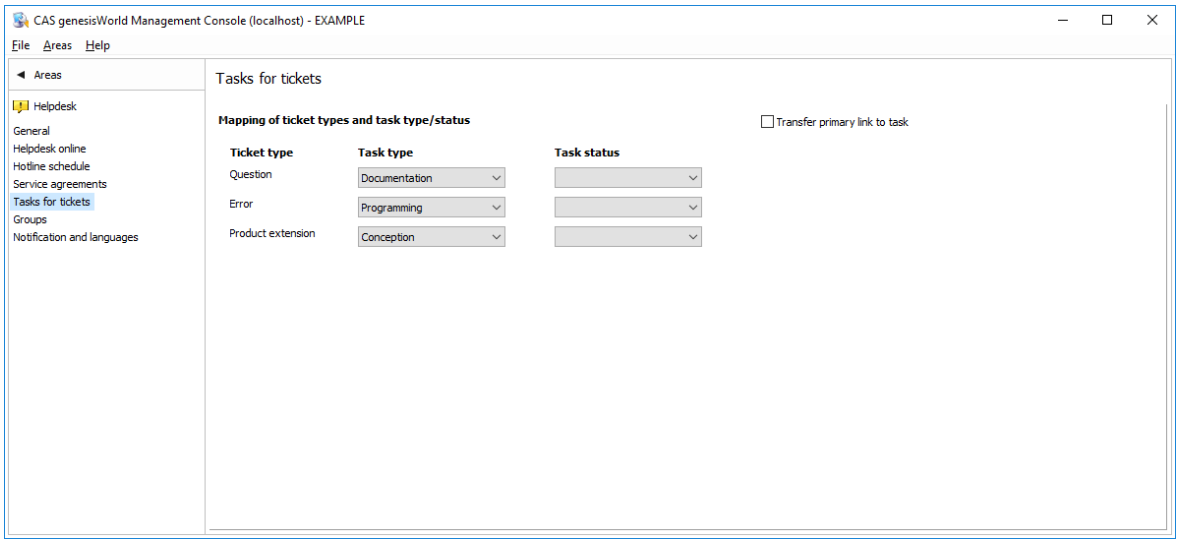
- **Include holidays when calculating response deadlines:** Specify here for which country and federal state public holidays should be accounted for in the response deadline. These are also the presettings for new service agreements. If and when support is available on public holidays, is specified in the hotline hours.

- **Default by service level:** Here you specify presettings for new service agreements. Different types of agreements are distinguished via the **Service level** field.
  - **Service level:** Select here from the input help items for the **Service level** field the kind of service agreement for which you wish to enter presettings.
  - **Response deadlines and hotline hours:** You may enter presettings for response deadlines and hotline hours here as for tickets without a service agreeement.
  - **Maintenance billing:** Via the **Maintenance interval** menu you switch between the billing intervals stored for service agreements. **Month**, **Quarter** and **Year** are available for selection. Specify the desired maintenance rate in percent for the selected service level and billing interval.
- With the **Automatically calculate maintenance fee** option, a service agreement's **Maintenance charge** and **Contribution margin** fields will automatically be updated when the **Maintenance** tab is opened and the user has sufficient permissions.

  Please note that this is a global setting and doesn’t depend on the service level.

## 11.2.5 Tasks for tickets

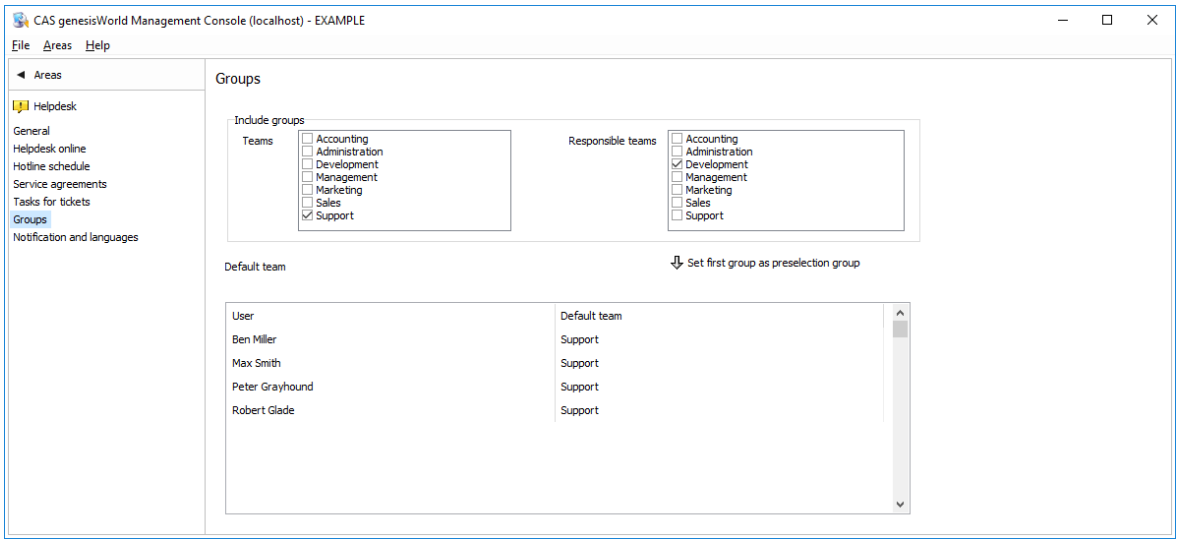
Here you enter settings for tasks which you create for a ticket by clicking on the task icon next to the **Request** field in the **Ticket** tab.




- **Mapping of ticket types and task type/status:** Here you enter presettings for type and status of tasks for tickets. You may specify a different type and status for each ticket type.
- **Transfer primary link to task:** With this setting, the ticket for which a task is created will automatically be set as the new task's primary link.

## 11.2.6 Groups

Here you configure the assigment of tickets to ticket and handover teams.



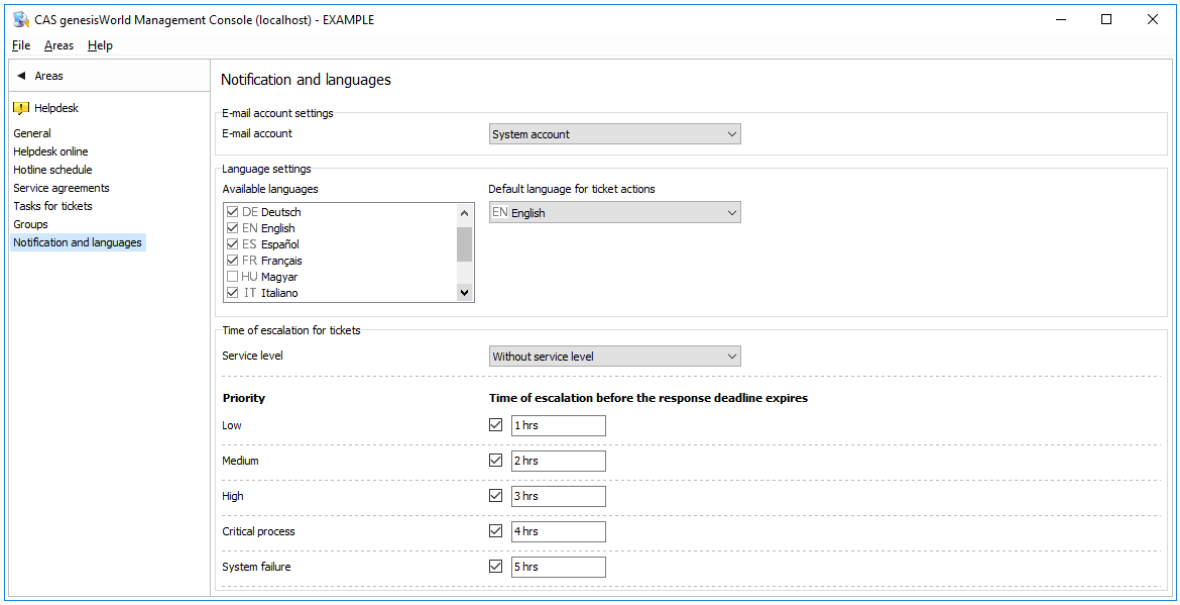

- **Include groups:** Select here the groups that should be available as support teams or as responsible teams.
  - **Teams:** Select here the groups that should be available as support teams (first level support).
  - **Responsible teams:** Select here the groups that should be available as responsible teams (second level support).
- **Default team:** Here you specify a preselection of the support team for each user.

  If a user for whom a support team has been preselected creates a ticket in CAS genesisWorld, his user name and the associated support team will be selected automatically.
- **Set first group as preselection group:** Click this button to select the first available entry as preselection for every user.

## 11.2.7 Notification and languages

Here you select the system e-mail account to use for ticket actions and Helpdesk online as well as the languages available for ticket actions and Helpdesk online.

Moreover, you determine here for which service levels and priorities an internal notification should occur before a request's response deadline is met and how many hours and minutes before that participants of the request should be notified.




- **E-mail account settings:** Here you select the system e-mail account to use for ticket actions and Helpdesk online, which you set up under **Server settings** in the **Rules** area.
- **Language settings**
  - Under **Available languages**, you select the languages to be used for ticket actions and Helpdesk online from all installed client languages.
    - All languages selected here will be available on the Helpdesk online logon page if a CAS genesisWorld client with the associated language resources has been installed on the computer on which Helpdesk online is operated.
    - The name and description of actions which are displayed to support employees in the client can be entered in all client languages selected here.
    - E-mail templates defined in actions can be entered in all languages selected here. When an action is executed, associated e-mail templates will be available in every language in which they have beeen entered.
  - E-mails sent via ticket actions default to the **Default language for ticket actions**.
  - Helpdesk online defaults to the browser language, English, database language, or first available language, in this order, depending on availability. If a user logs on again and the language cookie was saved and not deleted, the previous selection will be retained (see "10.4 Invocation and language selection" on page 129).

- **Time of escalation for tickets:** Here you determine for which service levels and priorities an internal notification should occur before a request's response deadline is met and how many hours and minutes before that participants of the request should be notified.

  Via the **Without service level** option in the **Service level** menu, you can enter notification times for requests without a service agreement.

  The point of reference for the notification is always the response deadline of the respective request.

  The actual point of notification depends on the service agreement's hotline time for the request's priority.

  For tickets without a service agreement, the respective hotline time is also considered.

## Example

If a request's response deadline expires on Monday at 8:00 and a notification has been configured 5 hours before for the service level of the associated service agreement and the request's priority, with a hotline time from 8:00 to 16:00 from Monday to Friday, the notification e-mail will be sent as soon as the previous Friday at 11:00.

- Under **Service level**, select the desired service level first.

  For requests without a service agreement, select the **Without service level** option.
- Via the check box in a **Priority**'s row, you determine whether users should be notified about expiring response deadlines of requests with that priority.
- Then, under **Time of escalation before the response deadline expires**, enter the desired period before the deadline expires to determine the respective point of notification.
- In order for the notification to occur, you must also configure a notification rule of the **Deadline exceeded** event type, which checks the **Escalation time** field, as described in section "12.5 Internal notification about expiring response deadlines" on page 215.
- Another requirement is the configuration of the notification service under **Rules** > **Server settings** in the Management Console. You may learn more about this from the online help or the Administrator manual.

## 11.3 Settings in the Miscellaneous area

The following sections describe the Helpdesk module settings in the **Micellaneous** area:

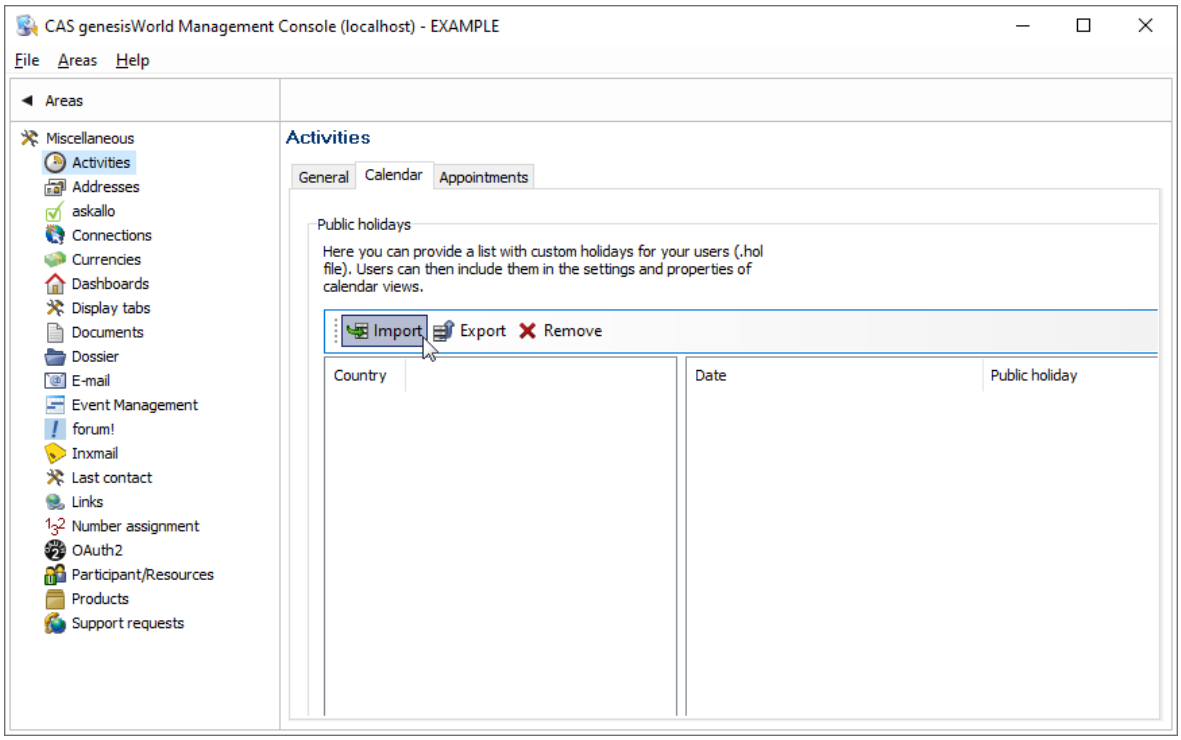


### 11.3.1 Activities (holidays for service agreements)

The country and federal state of a service agreement control which holidays are excluded when calculating the response deadlines of associated tickets.

A fixed selection of countries with federal states is always available. You can view the list in your **Settings** in CAS genesisWorld under **Calendar** > **Public holidays**.

You can add holidays for other countries and federal states by importing .hol files in the **Miscellaneous** area of the Management Console under **Activities** > **Calendar**.




After restarting the server, these will be available in a service agreement's **Country** field as well as in the associated presettings in the Management Console.

Federal states can't be added to the **Federal state** field. You can only add them as separate entries of the **Country** field.

## 11.3.2 Currencies

You may enter currencies in the **Miscellaneous** area, under **Currencies**.

All list items will be available for selection in all currency fields in CAS genesisWorld.

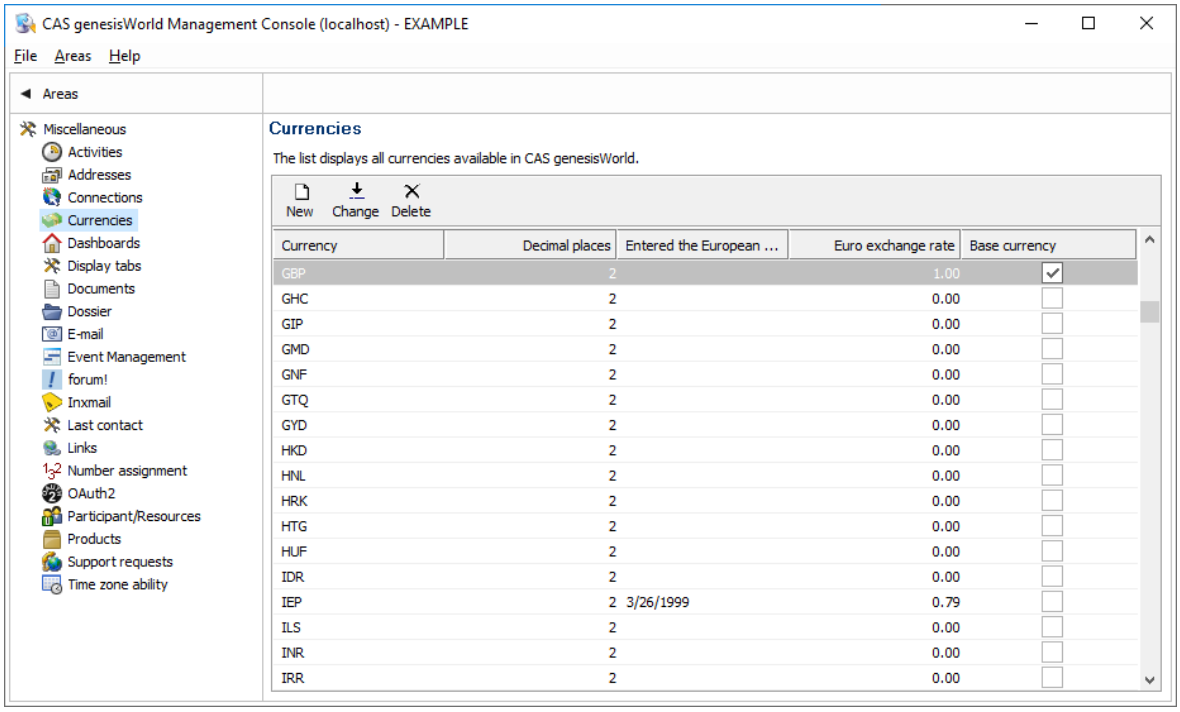
You also determine the system's **Base currency** here.

This is the presetting for currency fields in CAS genesisWorld.

To convert foreign currencies to the base currency in reports, in formula fields and in board views in CAS genesisWorld Web, enter conversion rates here.

Enter the conversion rate from the base currency to any foreign currency to convert as **Exchange ratio Euro to Currency**, regardless of which currency you are using as base currency. For example, if you are using GBP as base currency and wish to convert CHF, edit CHF and enter the conversion rate for GBP to CHF (e.g., if 1 GBP = 1.2 CHF, enter 1.2).

For the base currency itself, enter 1 as **Exchange ratio Euro to Currency**.




Please note that you can no longer change the **Base currency** after selecting the **Maintain different prices for products** option under **Miscellaneous** > **Products**.

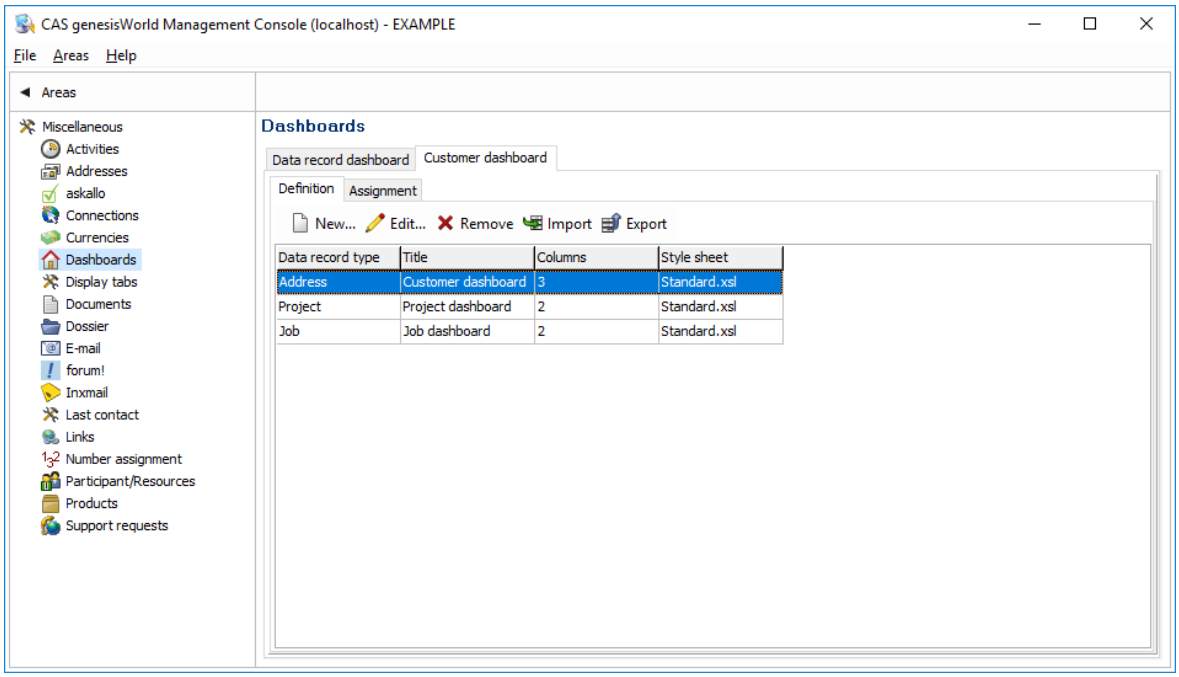
## 11.3.3 Dashboards

Use customer dashboard reports to process and clarify information from data records.

You can find the associated configuration in the **Miscellaneous** area of the Management Console, under **Dashboards** > **Customer dashboard**.

In the **Definition** tab, you create customer dashboard definitions.

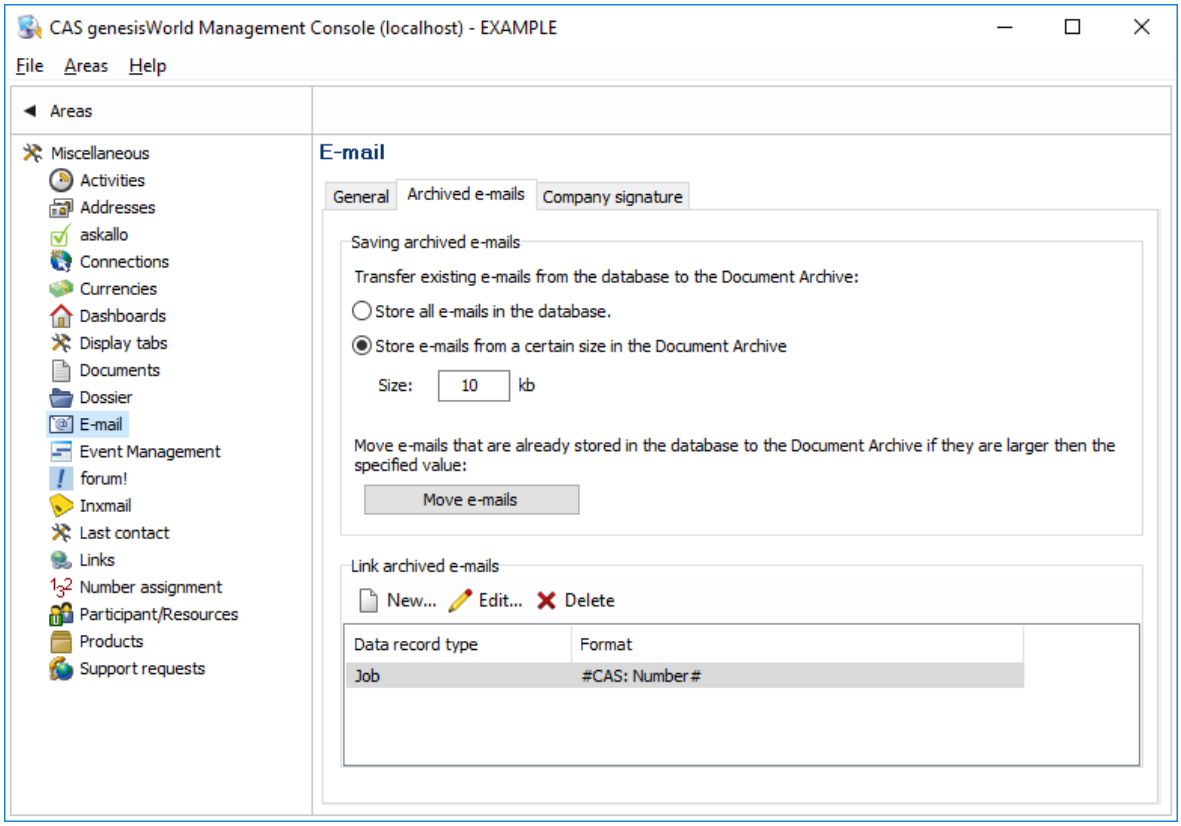
In the **Assignment** tab, you assign your definitions to the desired data record windows.




For details about the possibilities and configuration of customer dashboards, see the Report module user guide.

## 11.3.4 E-mail

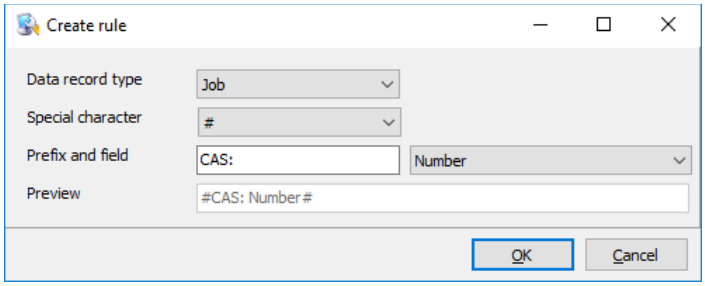
In the **Miscellaneous** area, under **E-mail** > **Archived e-mails** > **Link archived e-mails**, you configure the key for the subject line of e-mails that should be linked with the associated ticket automatically when they are archived.




Proceed as follows to create a new linking rule for e-mails belonging to tickets:

- ✓ Click **New...** to create a new linking rule.
- ✓ Select **Job** as **Data record type**.
- ✓ If you submit support inquiries to partners who are also using Helpdesk, enter a **Prefix** in the associated field to tell your system apart from your partner's.

  This way, you can avoid your partner's replies being accidentally associated with tickets in your system which happen to have the same number.
- ✓ Select **Number** as **Field**. Alternatively, you may select a different matching field.



When creating and editing the rule, the **Preview** field will display the correct format for the key in the subject line.

The correct format is also displayed in the **Format** column in the list of linking rules.

With the example from the screenshot, an e-mail with the sequence "#CAS: 123#" in the subject would automatically be linked to the ticket with the number 123 when it was archived.

Enter the key defined here in the subject of e-mails created for tickets via ticket actions (see "2.4 Ticket actions" on page 23), via e-mail templates (see "4 Using e-mail templates" on page 47) and via the notification service (see "12 Notification and support account" on page 195) in order to link these e-mails and responses to them with the associated ticket automatically when the e-mails are archived.

Please note that a blank space is automatically inserted before the selected field. That blank space must also be entered in the subject line to assign an e-mail to the associated ticket.

## 11.3.5 Links

In the **Miscellaneous** area, under **Links**, you can create the **Has ticket access** link to give Helpdesk online users access to tickets submitted by specific companies and individual contacts.

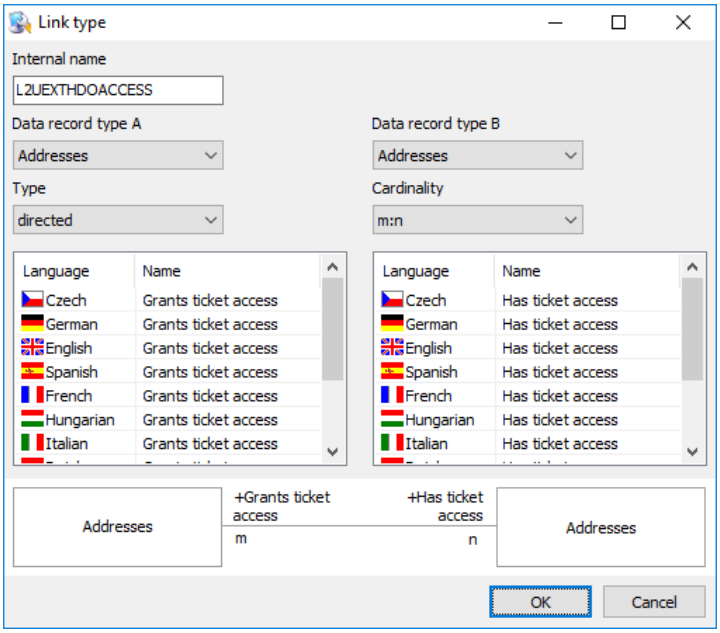
Linking a Helpdesk online user's address to a company or individual contact via the **Has ticket access** link will display tickets submitted by the linked company or individual contact for that user in Helpdesk online in addition to the tickets he may see according to his access level (see "2.6 Setting up access for Helpdesk online" on page 37).

Tickets submitted by linked addresses will be displayed in Helpdesk online starting with the **Company requests** access level.

The user may also create requests for the linked address in Helpdesk online when the customer selection is active.

To do this, first create the link under **Miscellaneous** > **Links**.

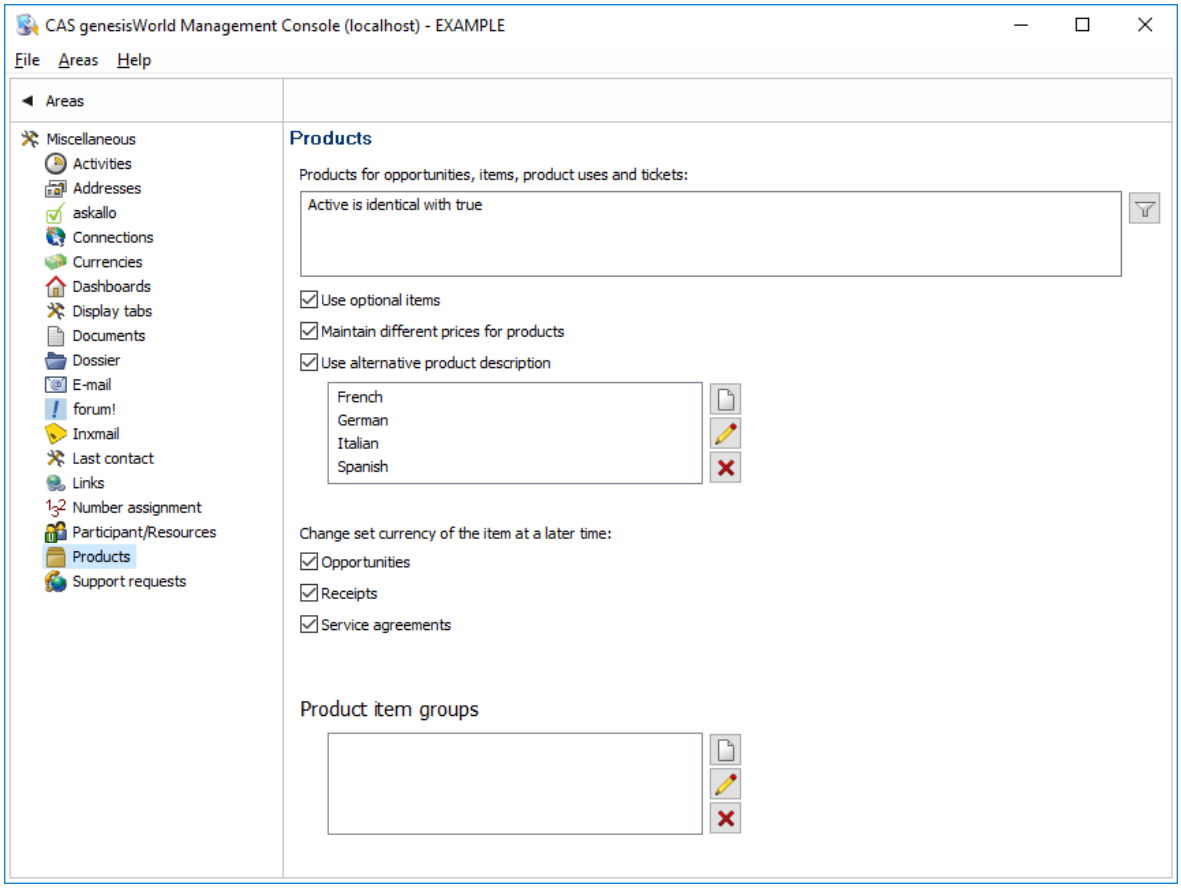
The link must have the following properties:




- **Internal name:** L2UEXTHDOACCESS
- **Data record type A:** Addresses
- **Data record type B:** Addresses
- **Type:** directed
- **Cardinality:** m:n
- **Link name:** Has ticket access
- **Reversed link name:** Grants ticket access

## 11.3.6 Products

In the **Miscellaneous** area, under **Products**, you enter settings for products, product uses, tickets and service agreements.




The following settings on this page relate to Helpdesk features:

- **Products for opportunities, items, product uses and tickets:** Here you can see and change the product filter for opportunity product items, project items (with Project), receipt items (with Easy Invoice) as well as product uses and tickets.

  With the default filter, all products selected as **Active** will be available.

- **Maintain different prices for products:** By default, you may only enter exactly one sales and purchase price in exactly one currency for each product. Here you activate or deactivate the entry of sales and purchase prices for products in different currencies.

  The price information entered for a product and currency will automatically be adopted to associated product uses created for service agreements with that currency.

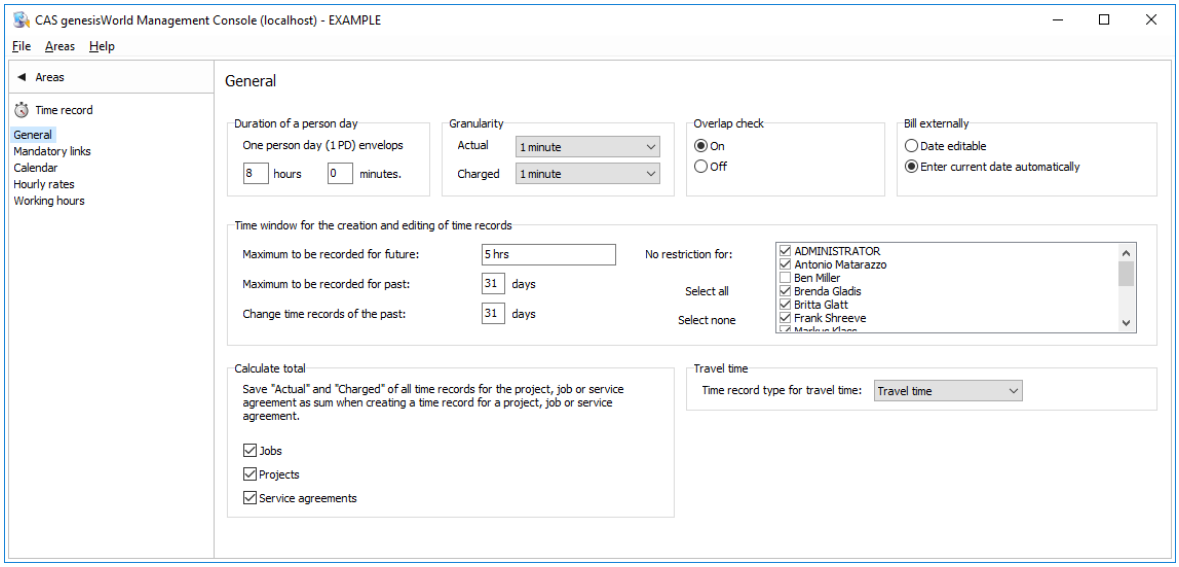
- **Change set currency of the item at a later time:** Here you determine whether the currency of an existing service agreement can be changed via the **Tools** menu. When changing the currency, you may retain prices, set the to zero or enter a conversion rate.

## 11.4 Settings in the Time record area

The following sections describe the settings in the **Time record** area:



### 11.4.1 General




- **Duration of a person day:** Here you specify how many hours and minutes should be subsumed under one person day. The default setting is 8 hours.
- **Granularity:** Here you select the smallest recordable interval for the **Actual** and **Charged** fields. No smaller interval may be selected for **Charged** than for **Actual**.
  - 1 second, 1 minute, 5 minutes, 10 minutes, 15 minutes, 30 minutes, 1 hour
- **Overlap check:** Here you enable or disable the overlap check for time records.
- **Bill externally:** Here you specify whether users may edit the external billing date. In this case, users are prompted to enter the desired billing date when externally billing time records via the context menu of the time record list.
- **Time window for the creation and editing of time records**
  - **Maximum to be recorded for future:** Time records whose end time is further in the future than specified here may not be saved.
  - **Maximum to be recorded for past:** If the start of a time record to create is further in the past than specified here, it may not be saved.

- **Change time records of the past:** If the start of an existing time record is further in the past than specified here, changes made to it may not be saved.
- **No restriction for:** Select here users to exempt from the specified restrictions.

- **Calculate total:** Here you specify whether the total work time for a project, job or service agreement is calculated whenever time is recorded for it. Time records for associated tickets are considered for service agreements. The actual work time will be written in the **Actual time** field. The order value will be written in the **Charged** field.

## Note

The fields are updated whenever time records for projects, jobs or tickets belonging to a service agreement are created or deleted. The fields are not updated when the link for an associated data record is changed (e.g., when a ticket is removed from a service agreement by resetting the service agreement selection in the ticket).

With the Form Designer module, you can define business ratio fields that are updated automatically whenever the associated data record is opened.

Additionally, you can create new project, job and/or service agreement fields of the float type as target fields in the **Database** area of the Management Console and enter them as target fields for the business ratio fields. If you do, you can use scheduled updates to update these fields regularly automatically (e.g., nightly or hourly) or update them manually via the context menu (requires the **Actions: execute** other right).

Create the following business ratio fields for projects and/or jobs respectively:

1. Linked data record type: Time records / Calculation: Actual / Sum

2. Linked data record type: Time records / Calculation: Charged / Sum

To save the results in target fields you have created for projects and/or jobs, select them under **Save result in field** for the respective business ratio fields.

Under **Data records**, select the **Only primary links** link type.

Under **Formatting**, select the **Duration (person days)** or **Duration (24h/day)** format.

For service agreements, you need a two level business ratio field. First, create Actual/ Target business ratio fields with associated target fiels of the float type for jobs as described above. Then, create the following business ratio fields for service agreements:

1. Linked data record type: Jobs / Calculation: (Actual target field) / Sum

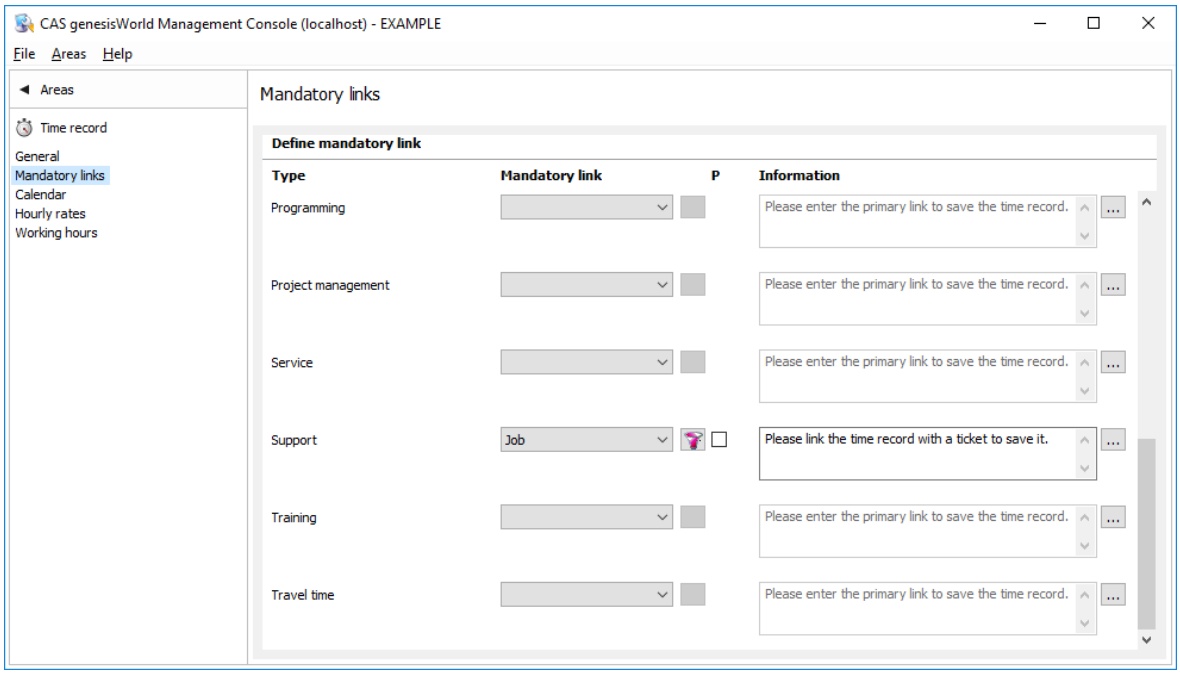
2. Linked data record type: Jobs / Calculation: (Charged target field) / Sum

Then, enter the same settings as described above for projects and jobs (**Save result in field**, link type and format).

- **Time record type for travel time:** Select here the time record type for recording the trips to and from the destination for appointments in CAS genesisWorld Web and CAS genesisWorld Desktop.

## 11.4.2 Mandatory links

Here you define mandatory links for time record types.




- **Mandatory link:** Select here the desired data record type.
  - **Specify filter condition:** Click on the filter icon to specify filter conditions.
  - **Participant:** If you select the **P** option, the time record's participant must also be a participant of the linked data record to save the time record.

    Groups are not resolved here. Only if a user has directly been entered as the participant of a data record, he can record time for it.
- **Information:** Enter here a message to display when a user tries saving a time record which is not linked as specified here.

  ··· Here you enter the message in different languages.

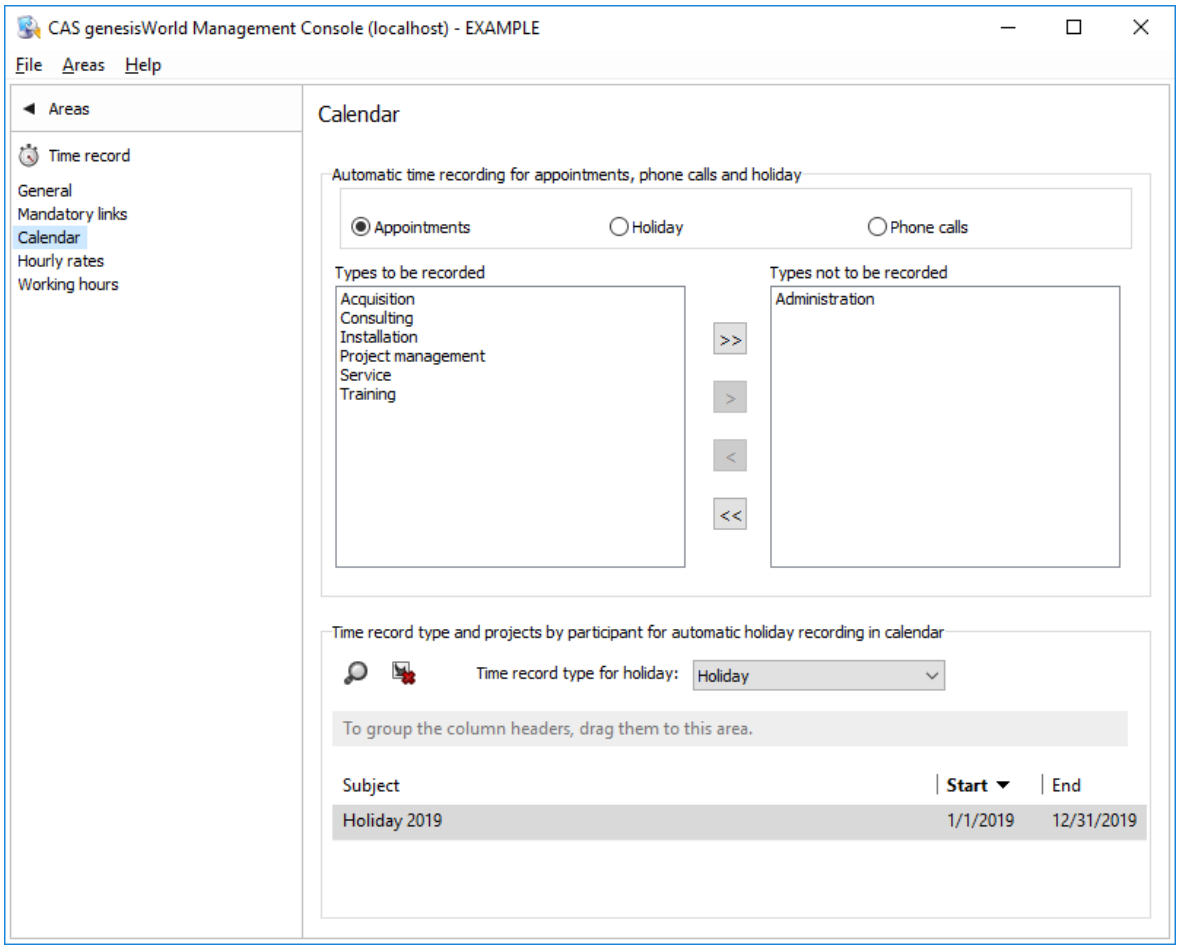
## Example

To limit use of the time record type **Support** to tickets, select the data record type **Job** in the associated row. Limit time recording to tickets using the following filter condition: **Type – is equal – Ticket**. If desired, add filter conditions for more ticket types and for the desired status opens (e.g., **Status – is not equal – Completed**, to restrict time recording to tickets which have not yet been completed.) Select the **P** option if only a ticket's participants may record time for it.

Enter an expressive message to display when the rule is violated in the **Information** field (e.g., "You may only create time records of the 'Support' type for your tickets.")

## 11.4.3 Calendar

Here you configure the time record calendar's multiple recording feature.




- **Automatic time recording for appointments, phone calls and holiday:** Here you select appointment, holiday and phone call types for which time should automatically be recorded when clicking on the associated button in the calendar. With teamWorks, holidays are distinguished by the **Holiday type** field, if there are no types for holidays.

  To lock the recording of certain types or holiday types, select the data record type for which you wish to modify the setting. Then carry over the entries for which time should not automatically be recorded to the right list.

- **Time record type and projects by participant [...]:** Select here projects in which leaves taken by their respective participants will be recorded. When a participant of a project selected here records a leave in the calendar, the time records will be booked on the project.

  **Search project:** Here you select a project in the **Search** window. Via the list you may open, view and edit it.

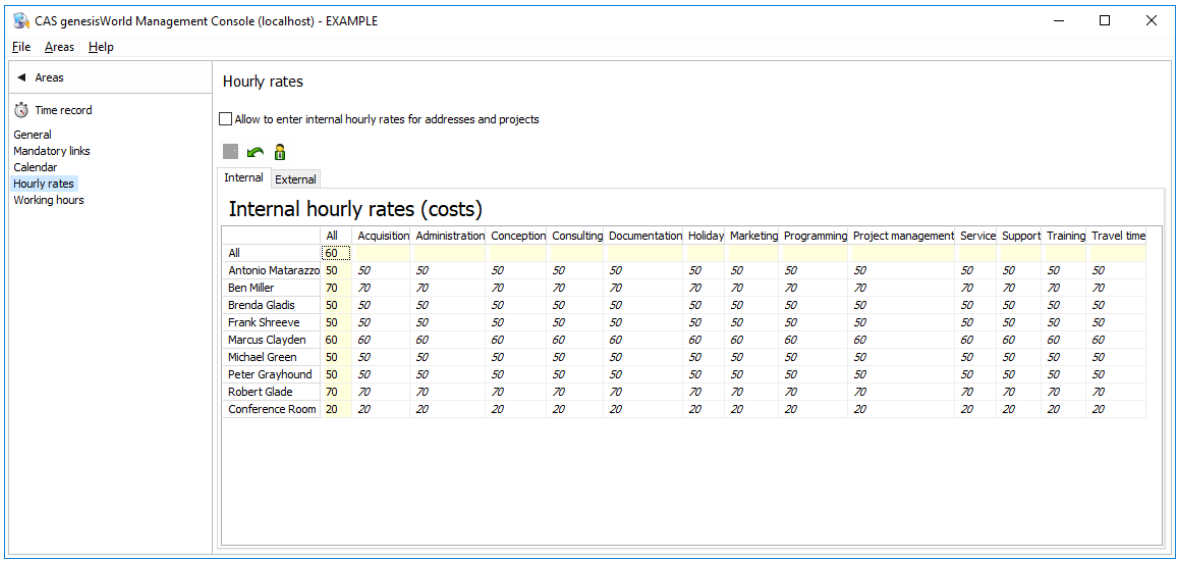
  **Remove:** Here you remove a project from the selection.

  - **Time record type for holiday:** Specify the type for holiday records here.

## 11.4.4 Hourly rates

Here you specify global hourly rates. They are valid for all customers and projects for which you do not specify different hourly rates.

Entering different hourly rates for specific customers and projects is described in section "6.1.6 Defining hourly rates for addresses and projects" on page 92.




- **Allow to enter internal hourly rates for addresses and projects:** By default, you may only enter different external hourly rates for addresses and projects. Select this option in order to also enter different internal hourly rates for addresses and projects.

**Save:** Here you save changes made to the hourly rates in the database.

Close the view without saving to revert changes.

**Transfer hourly rates:** Here you overwrite the displayed hourly rates, **Internal** or **External** (see below), with the hourly rates from the other view. This includes emptying fields that are empty in the other view.

- After confirmation, the changes will be displayed in the view.
- The changes will only be applied to the database when they are saved.
- Close the view without saving to revert changes.

**Select participants:** Here you select the users and resources to display. Users and resources for which internal or external hourly rates have already been entered will automatically be selected when you open the view. When a user or resource is removed, associated hourly rates will be retained.

- **Internal and External:** The **Internal** and **External** tabs are structured identically.
  - **Internal:** Here you specify internal hourly rates. Billing a time record internally will determine the internal hourly rate for the user/resource and activity (time record type) and multiply it with the **Actual** work time to calculate the **Actual costs**.

- **External:** Here you specify external hourly rates. Billing a time record externally will determine the external hourly rate for the user/resource and activity (time record type) and multiply it with the **Charged** order value to calculate the **Actual turnover**.

- **Entering hourly rates:** The white table fields are provided for entering hourly rates valid for exactly one user or resource and one activity (time record type). The yellow fields are provided for entering hourly rates valid for users, resources and activities for which no other hourly rate was specified.
  - **General hourly rate:** Enter the general hourly rate in the first field of the table in the top left corner. It will be valid for all table fields and thereby for all users, resources and activities (time record types) for which no other hourly rate is specified.

    The general hourly rate will show up in all of these fields in italics.
  - **Hourly rates for users and resources:** Enter hourly rates for users and resources in the first column. Each of these will be valid for all table fields of the associated row and thereby for all activities (time record types) for which no other hourly rate is specified.

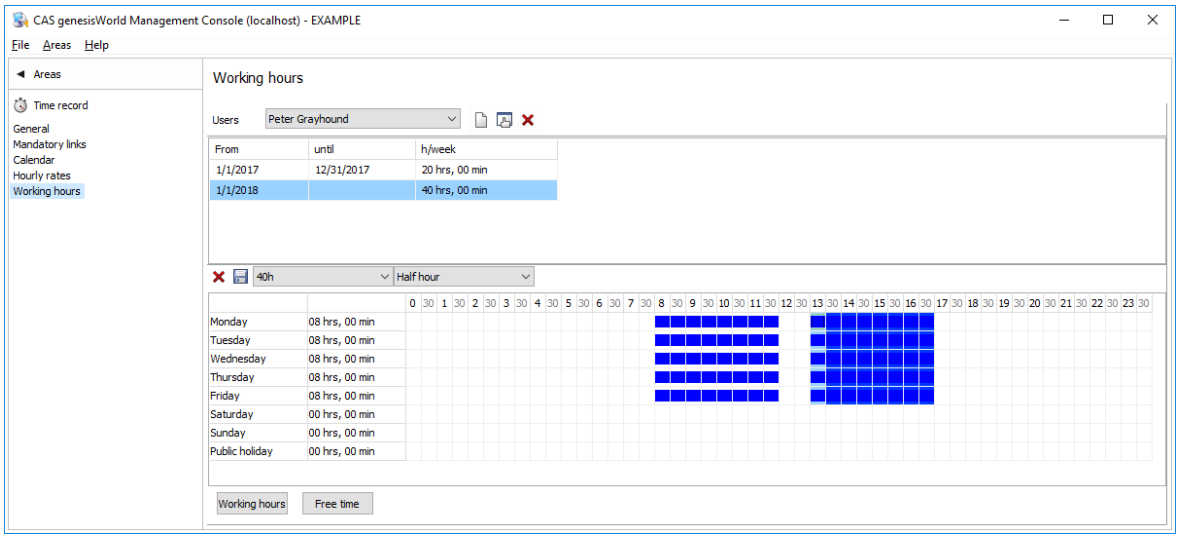
    The hourly rate will show up in all of these fields in italics.
    - Internal hourly rates for users and resources take precedence over internal hourly rates for activities (time record types).
    - External hourly rates for users and resources are only valid for activities (time record types) for which no other hourly rate was specified.
  - **Hourly rates for activities (time record types):** Enter hourly rates for activities (time record types) in the first row. Each of these hourly rates is valid for all table fields of the associated column and thereby for all users and resources for which you have not specified another hourly rate. The hourly rate for the type will show up in all of these fields in italics.

    The hourly rate will show up in all of these fields in italics.
    - Internal hourly rates for activities (time record types) are only valid for users and resources for which no other hourly rate was specified.
    - External hourly rates for activities (time record types) take precedence over external hourly rates for users and resources.
  - **Hourly rates for a user/resource and activity (time record type):** Enter hourly rates for specific users or resources and for specific activities (time record types) into the respective white table field in which the row for the user or resource and the column for the activity (time record type) intersect.

    Such hourly rates in white table fields take precedence over any other hourly rates

## 11.4.5 Working hours

Here you record a log of working hours for employees and a log of availability hours for resources.




- **Views and Features for logged working hours:** The following features consider the working hours you enter here. For employees for which you do not enter working hours here, the working hours you enter in your user settings in the **Calendar** tab are used instead.
  - **Planner (interactive):** This view displays working hours entered here in its Gantt view and in its workload view, and calculates the workload based on them. You must enter Resource availability hours here to display them in the view.
  - **Time recording:** In the time record calendar and in the data record window for time records, the working hours you enter here are considered.
  - **Resource planning in the tree view:** The tree view's resource planning view displays working hours entered here and calculates the workload based on them.
  - **Report [Report module]:** In Report views for time records, for which you have activated working hours calculation in the **User data** tab in the view's properties, the working hours you enter here are used.

## Note

For users and resources for which you enter working hours here, the interactive planner view, the time record calendar, the tree view's resource planning view and report views will display no working hours before the first working hours period you enter.

- **Select user or resource:** Select a user or resource in the menu to the top left to view the working or availability hours.

**Create working hours period:** Here you create a new working hours period. You will be prompted to enter the desired start date for the new working hours period. The day before the start date of the following working hours period will be automatically entered as end date. If no working hours period follows, the end date is left blank. Enter the working hours in the view's lower half (see "Edit working hours").

**Change start date:** Here you change the start date of the selected working hours period. Alternatively, you may change the start date by double-clicking a list entry.

**Delete working hours period:** Here you delete the selected working hours period. You will be prompted to confirm the deletion.

- **Edit working hours:** In the view's lower half, you enter the desired working or availability hours.
  - **Granularity:** Select the granularity in the menu at the top right of the lower toolbar (**Hour**, **Half hour**, **Quarter hour**, **5 minutes** or **Minute**).
  - **Working hours:** Using your mouse, select the desired working hours in the week view and click **Working hours** to enter them.
  - **Free time:** To remove working hours you have already entered, select them using your mouse and click **Free time**.

  Please note that working hours entered for public holidays will only be applied when the public holiday is on a week day with working hours. For example, if no working hours are entered for Sundays, public holidays on a Sunday are also considered free, even if working hours have been entered for public holidays.

  The working hours you enter will be transferred directly to the list of working hours periods and saved.

**Save working hours template:** Here you save the working hours you have entered in a template to transfer them to other users or resources.

- **Select working hours template:** In the left menu of the lower toolbar, you may select a template to transfer the working hours stored in it to the list entry you have selected in the upper list. Changes made to the displayed working hours will be saved in the user's working hours as well as in the template.

**Delete working hours template:** Here you delete the selected working hours template. You will be prompted to confirm the deletion. Deleting a working hours template has no effect on working hours created from that template.

# 12 Notification and support account

The following sections describe how to set up rules to notify customers about their Helpdesk online account activation, to notify submitters about new and changed tickets, for the request for feedback about completed tickets and for the notification of the team about requests whose response deadline is about to expire.

Additionally, setting up a support e-mail account is described. For e-mails sent to this account which can't be associated with an existing ticket via an archiving rule, new tickets will automatically be created.



The sections about external notifications also describe how you mark e-mails sent due to the rule with the ticket number and optional prefix in the subject line, such that these e-mails and replies to them will automatically be filed with the respective request (see "11.3.4 E-mail" on page 183).

You can enter the desired rules under **Rules** in the Management Console or in the **Rules** tab of the **Settings** window in CAS genesisWorld (Administrator rights required).

The notification service must be configured under **Rules** > **Server settings** in the Management Console. You may learn more about this from the online help or the Administrator manual.

## 12.1 Helpdesk online account enabling notification

Proceed as follows to notify customers about enabling of their Helpdesk online accounts.

Via the link included in the notification, the customer may request an activation link which will be sent with another e-mail in order to confirm the customer's identity. He can then enter his password to activate his account.

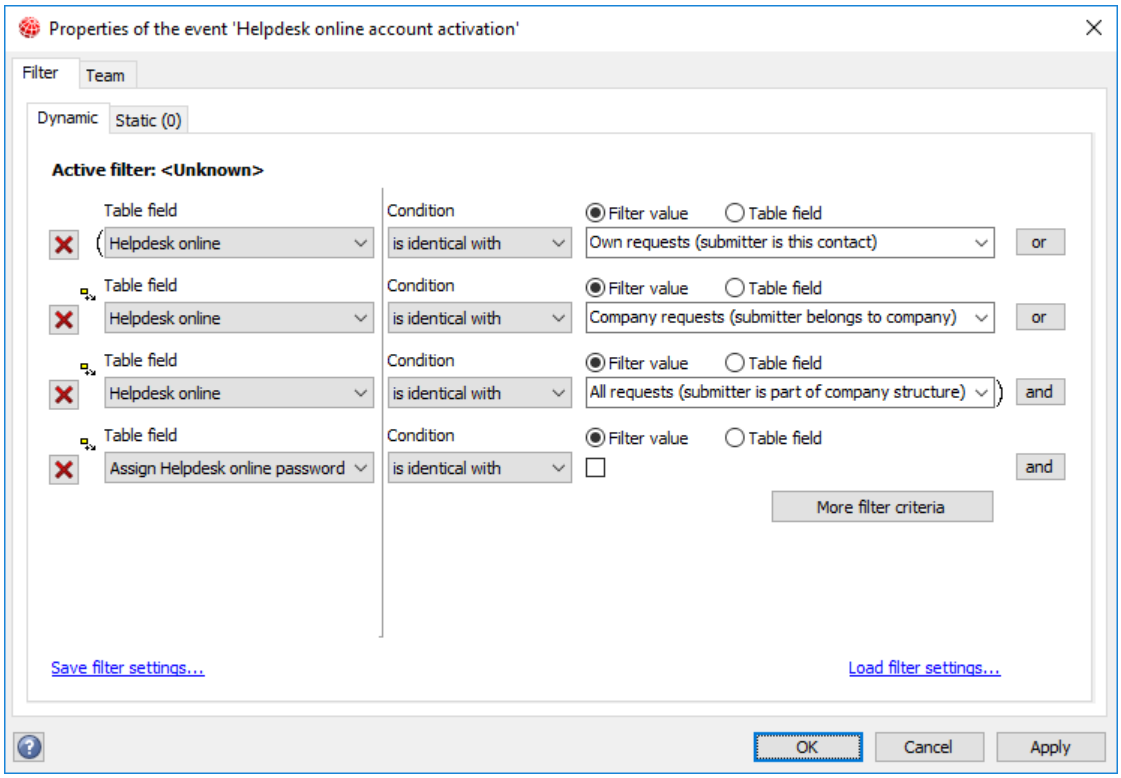
To enable an account, select the associated Helpdesk online access level in the address record's **Helpdesk online** field. You can do this for any company or individual contact in the **Details** tab or for multiple contacts via an **Action** (see section "2.6 Setting up access for Helpdesk online" on page 37 for details).

In both cases, the contacts will be notified via the rule you are about to create.

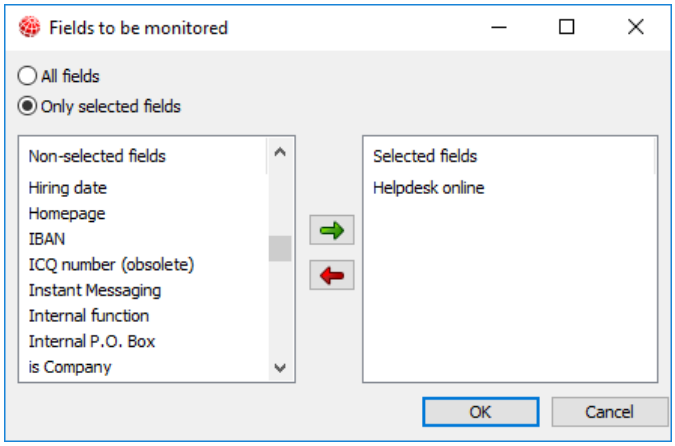
Execute the following steps to created that rule:

✓ Click **New** to create a new rule.

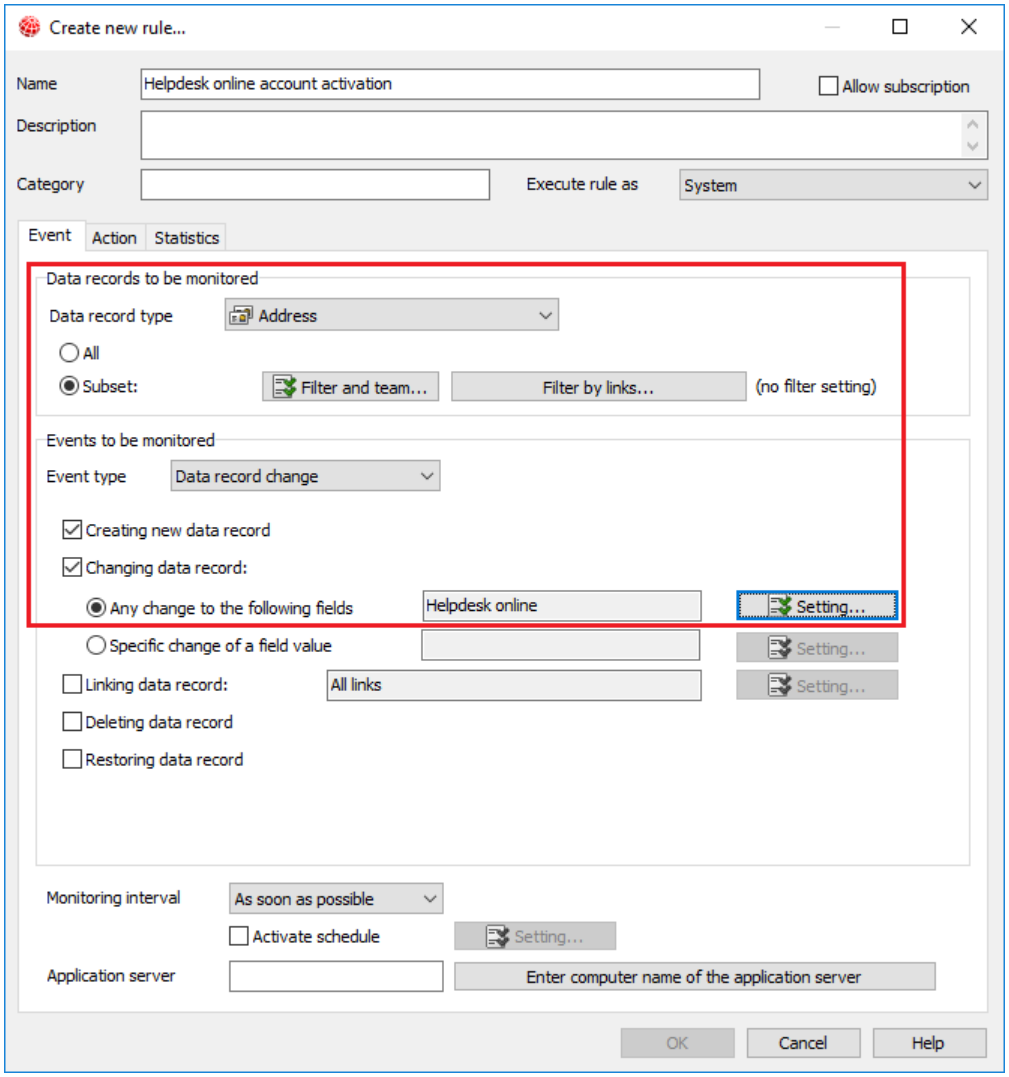
- ✓ Enter a meaningful name (e.g., **Helpdesk online account activation**).
- ✓ Click **Filter and Team**.
- ✓ Select filter conditions for each access level, connected with **or**, embraced by brackets: **Helpdesk online – is identical with – [Access level]** (see screenshot).
- ✓ Make sure that contacts who have already activated their accounts won't be requested to activate their account again. To do this, connect another condition with **and**: **Assign Helpdesk online password – is identical with – ☐**




- ✓ Click **OK** to confirm.
- ✓ In the **Event type** menu, select **Data record change**.
- ✓ Select the **Creating new data record** event.
- ✓ Select the **Changing data record** event.
- ✓ Click on the **Setting** button next to the **Any change to the following fields** option.
- ✓ Select the **Helpdesk online** field, then click **OK** to confirm.



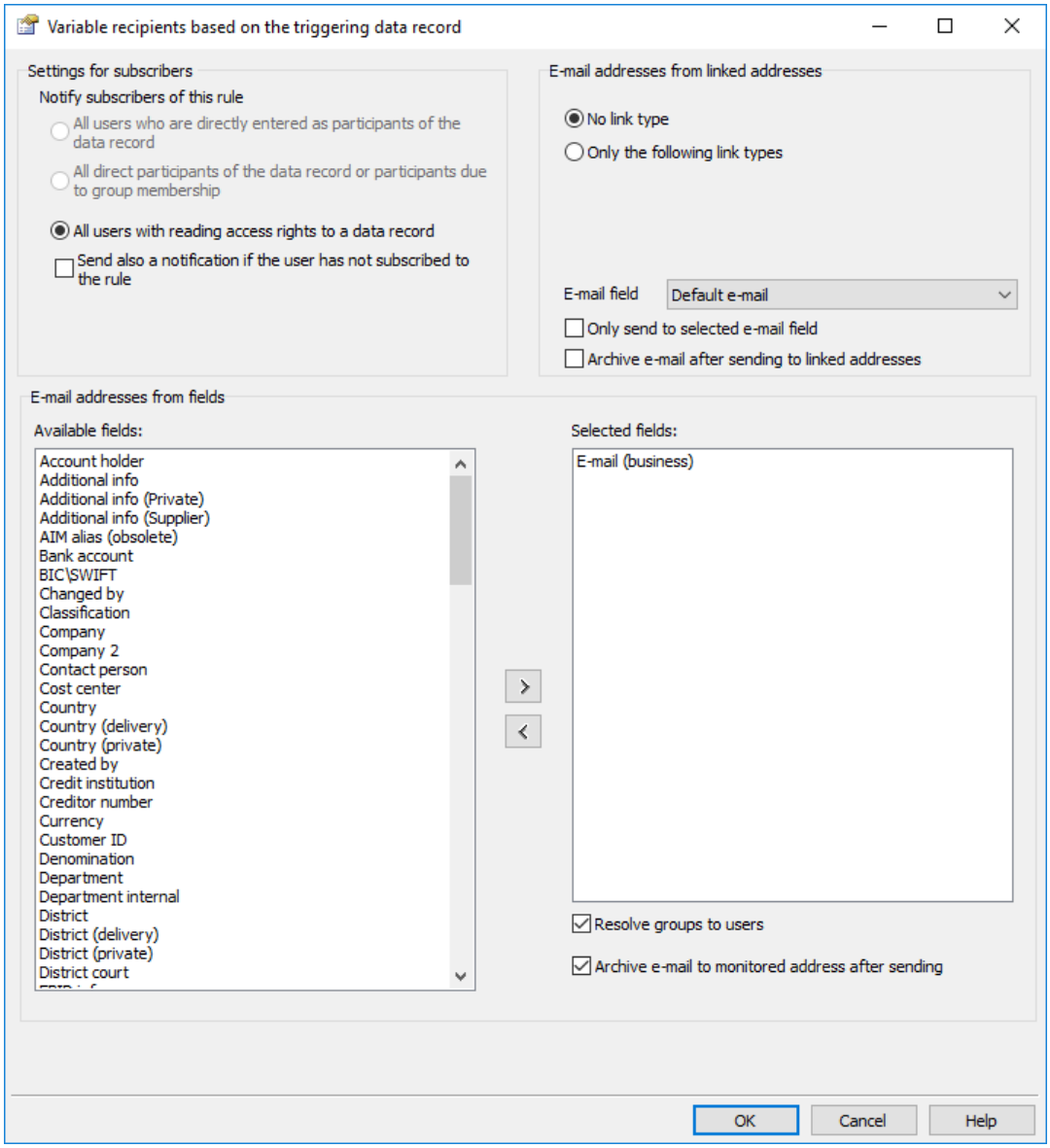

The following settings should be visible in the **Event** tab:




✓ Switch to the **Action** tab.

✓ In the **Action** menu, select **Notification**.

- ✓ If desired, click on the **Selection** button next to the **Sender** field to change the e-mail's sender or recipient of replies.
- ✓ Click on the **Selection** button next to the **Variable recipients** field.
- ✓ Under **E-Mail addresses from fields**, select the **E-mail (business)** field.
- ✓ Select the **Archive e-mail to monitored adddress after sending**.




- ✓ Click **OK** to confirm.
- ✓ Remove yourself from the permanent recipients if you do not wish to receive copies of all notifications about new requests. To do this, click on the button with the icon of a red cross next to the **Permanent recipients** section.
- ✓ Enter the subject line and body text for the e-mail in the lower section.

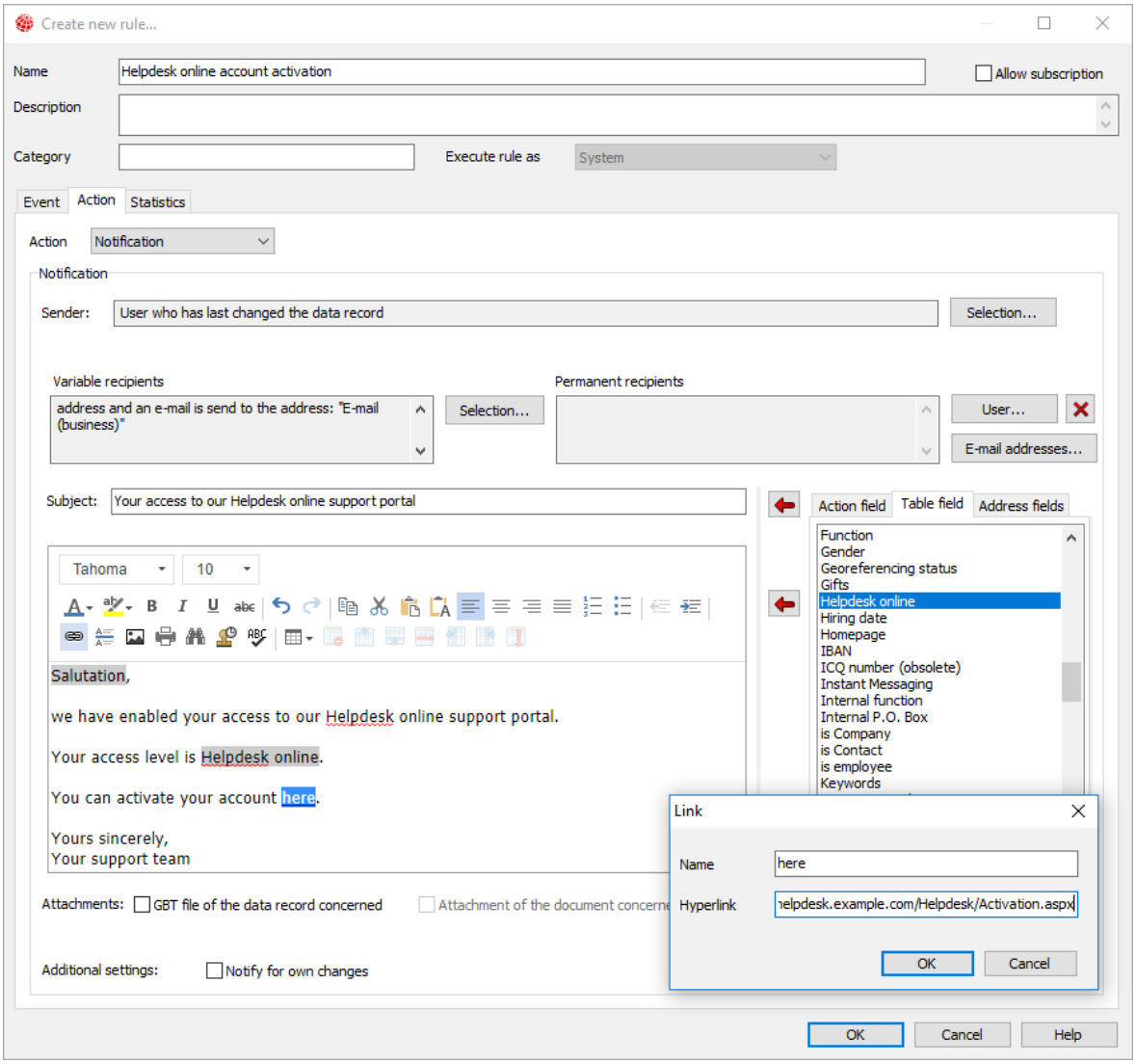
Insert the following link to the activation page:

```
https://helpdesk.example.com/Helpdesk/Activation.aspx
```

Replace `https://helpdesk.example.com/Helpdesk/` by your Helpdesk online system URL.

On the activation page, customers can confirm their identities via e-mail after which they may enter their password to finalize the activation.

The following settings should be visible in the **Action** tab:




✓ Confirm the creation of the new rule by clicking **OK**.

✓ Confirm the activation of the new rule by clicking **Yes**.

## Notes

The notification and action service must be correctly set up and running in order to send e-mails.

The rule will be triggered whenever a contact with access to Helpdesk online is created or an appropriate access level is selected for an existing contact.

When the customer activates his account in Helpdesk online, the **Helpdesk online password entered** field will be set in the associated address data record.

The filter by this field in the notification rule makes sure that rule won't be triggered again when the access level is changed via the **Helpdesk online** field.

If desired, you may notify customers with active access to Helpdesk online when the access level is changed. To do this, filter as described above, but with **Assign Helpdesk online password – is identical with –** ☑. Don't test for created data records but only for changes of the **Helpdesk online** field.

## 12.2 Notifying the submitter about a new ticket

You set up a rule for notification of the submitter about a new ticket as follows.

The message will only be created after the user's confirmation (see notes at the end of this section).

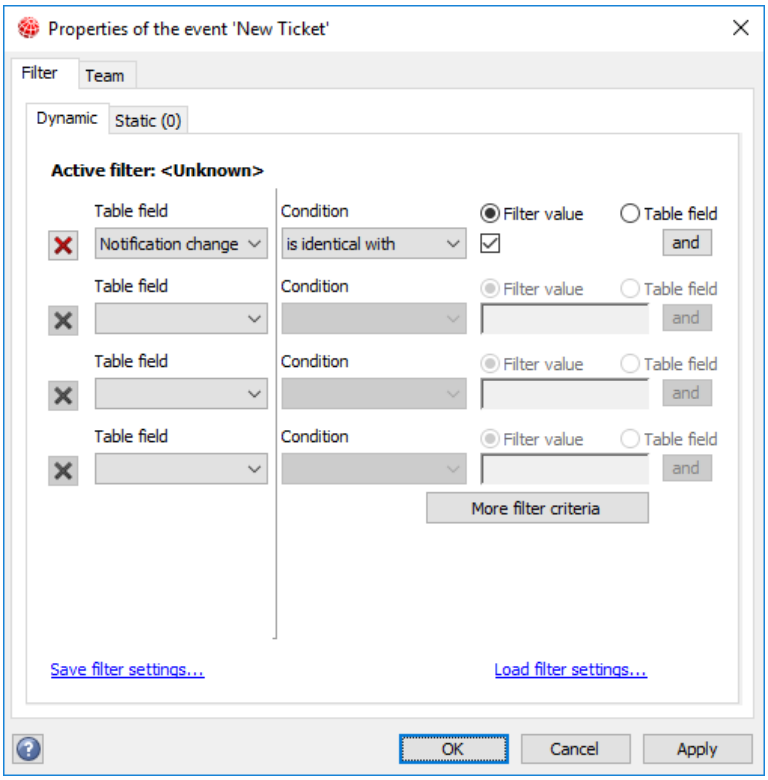
✓ Click **New** to create a new rule.

✓ Enter a meaningful name (e.g., **New ticket**).

✓ Select the **Job** data record type.

✓ Click **Filter and Team**.

✓ Select the filter condition **Notification change – is identical with – ☑**

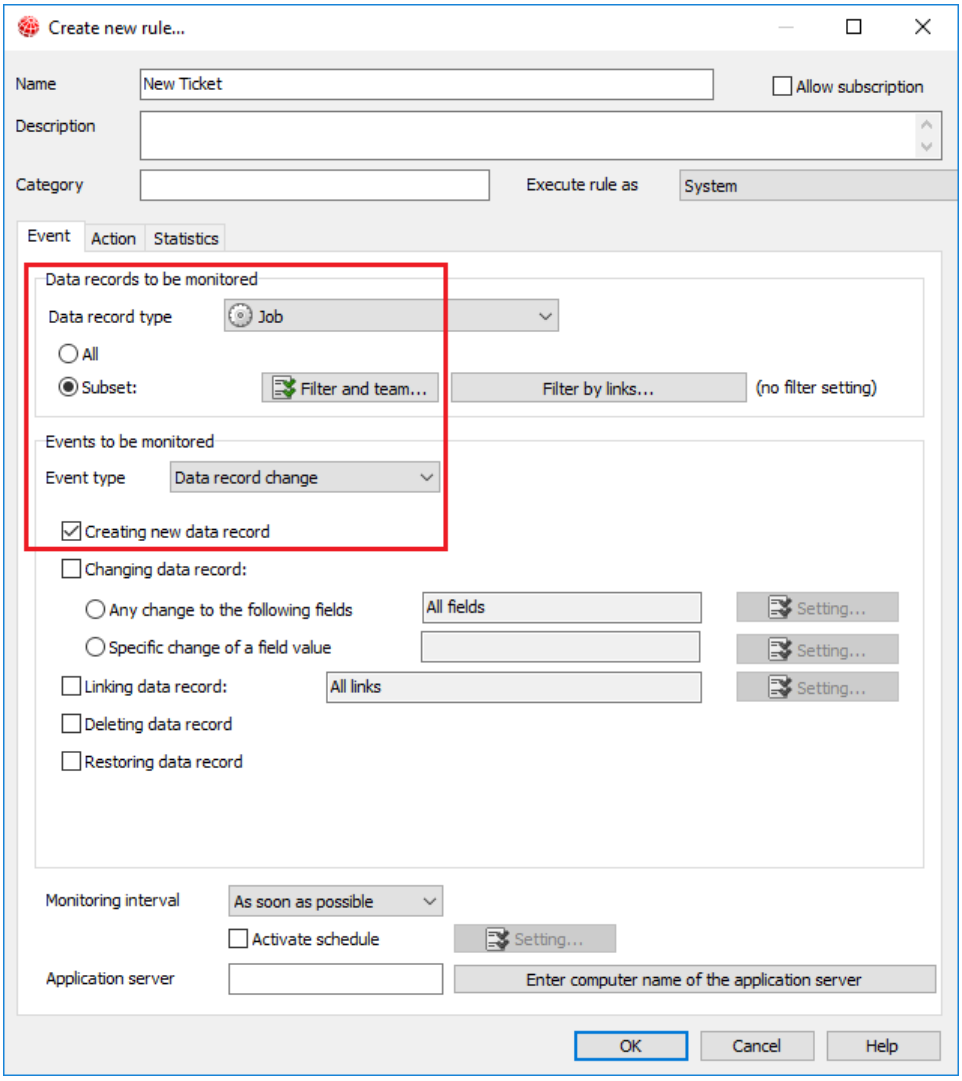



✓ Click **OK** to confirm.

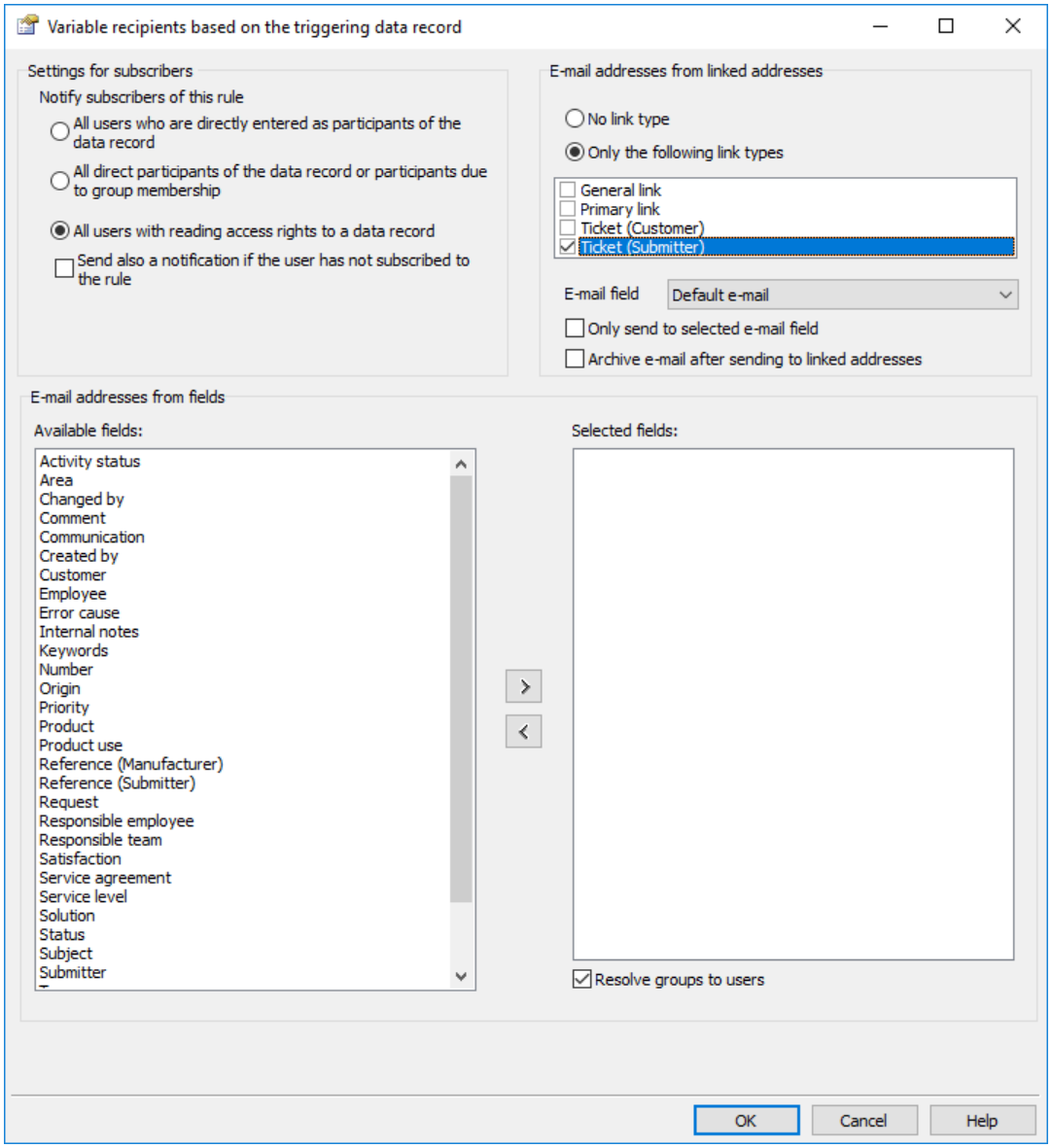
✓ In the **Event type** menu, select **Data record change**.

✓ Select the **Creating new data record** event.

The following settings should be visible in the **Event** tab:




- ✓ Switch to the **Action** tab.
- ✓ In the **Action** menu, select **Notification**.
- ✓ If desired, click on the **Selection** button next to the **Sender** field to change the e-mail's sender or recipient of replies.
- ✓ Click on the **Selection** button next to the **Variable recipients** field.
- ✓ Under **E-Mail addresses from linked addresses**, select **Only the following link types**.
- ✓ Select the **Ticket (submitter)** link type:




✓ Click **OK** to confirm.

✓ Remove yourself from the permanent recipients if you do not wish to receive copies of all notifications about new requests. To do this, click on the button with the icon of a red cross next to the **Permanent recipients** section.

✓ Enter the subject line and body text for the e-mail in the lower section.

If e-mails sent via the rule and replies to them should be linked with the associated ticket when the e-mails are archived, enter the key defined in the Management Console into the subject line (see "11.3.4 E-mail" on page 183).

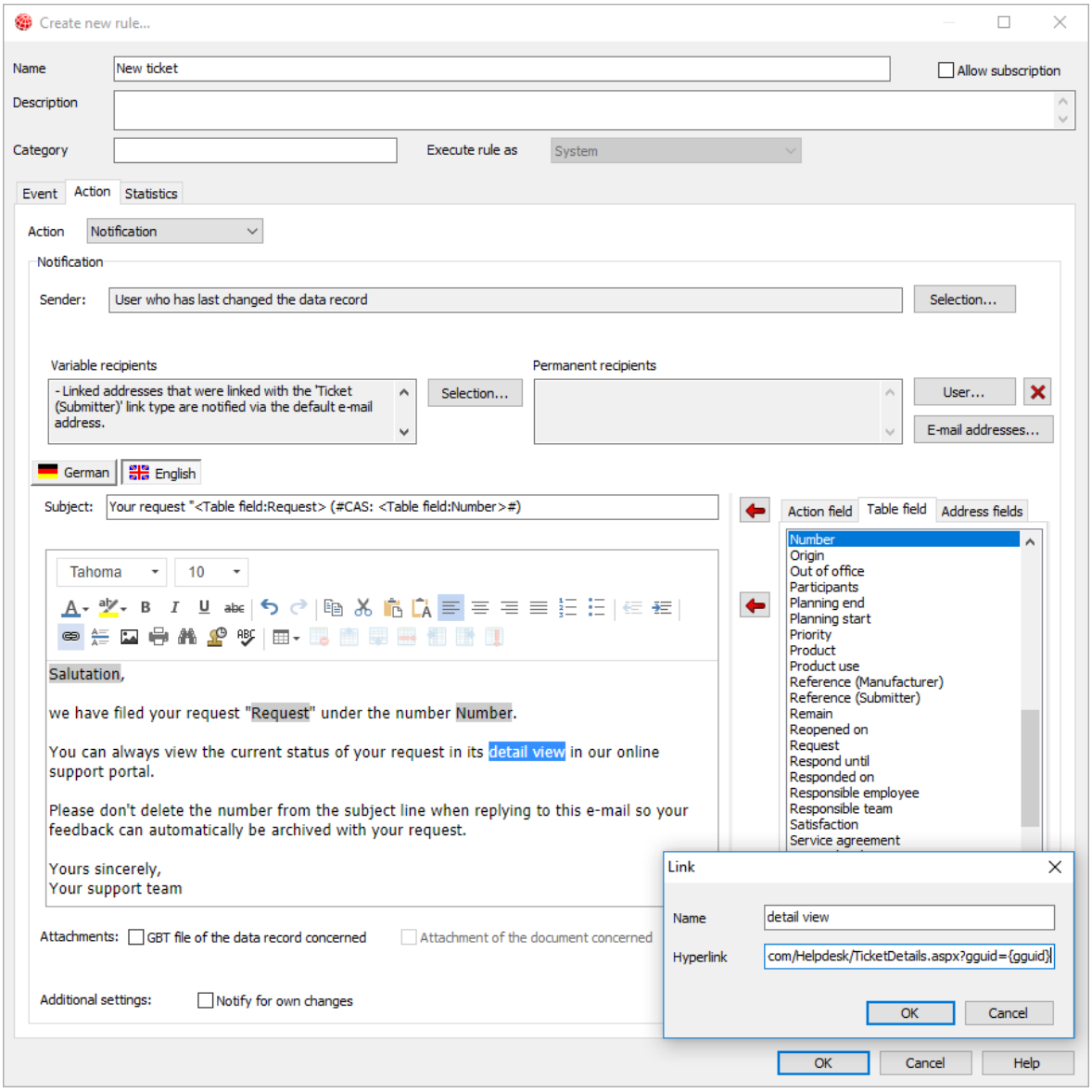
Please note that a blank space must be entered before the key field (e.g., when no prefix was defined and **Number** was selected as field, the key is "# Number#").

If you are using Helpdesk online, you can embed a link to the new ticket's detail view in the e-mail. To do this, enter the desired link text and connect it with one of the two following links using the e-mail editor's hyperlink fuction.

```
https://helpdesk.example.com/Helpdesk/TicketDetails.aspx?gguid={gguid}
```

Replace `https://helpdesk.example.com/Helpdesk/` by your Helpdesk online system URL.

The following settings should be visible in the **Action** tab:




✓ Confirm the creation of the new rule by clicking **OK**.

✓ Confirm the activation of the new rule by clicking **Yes**.

## Notes

The notification and action service must be correctly set up and running in order to send e-mails.

The rule will be triggered whenever a user creates a ticket and confirms the prompt "Do you wish to inform the submitter about the newly created ticket automatically?" Then the **Notification change** option, by which the rule filters, will be set in the ticket.

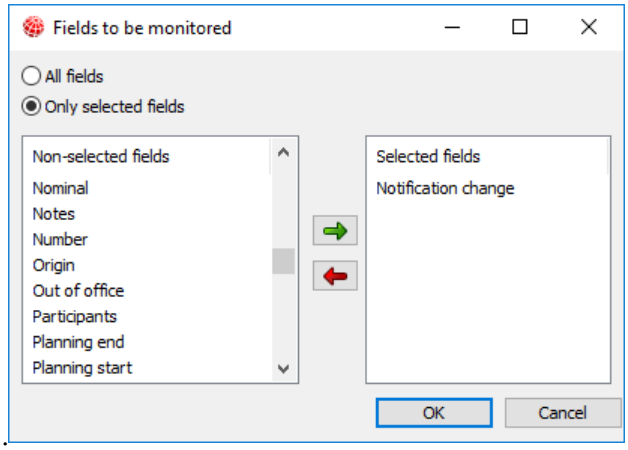
If you turn off the **Display "Inform submitter about changes" prompt** option under **Helpdesk > General** in the Management Console, the **Notification change** option will never be set in a new ticket.

In this case, the rule described in this section (new job with **Notification change = true**) will never be triggered.

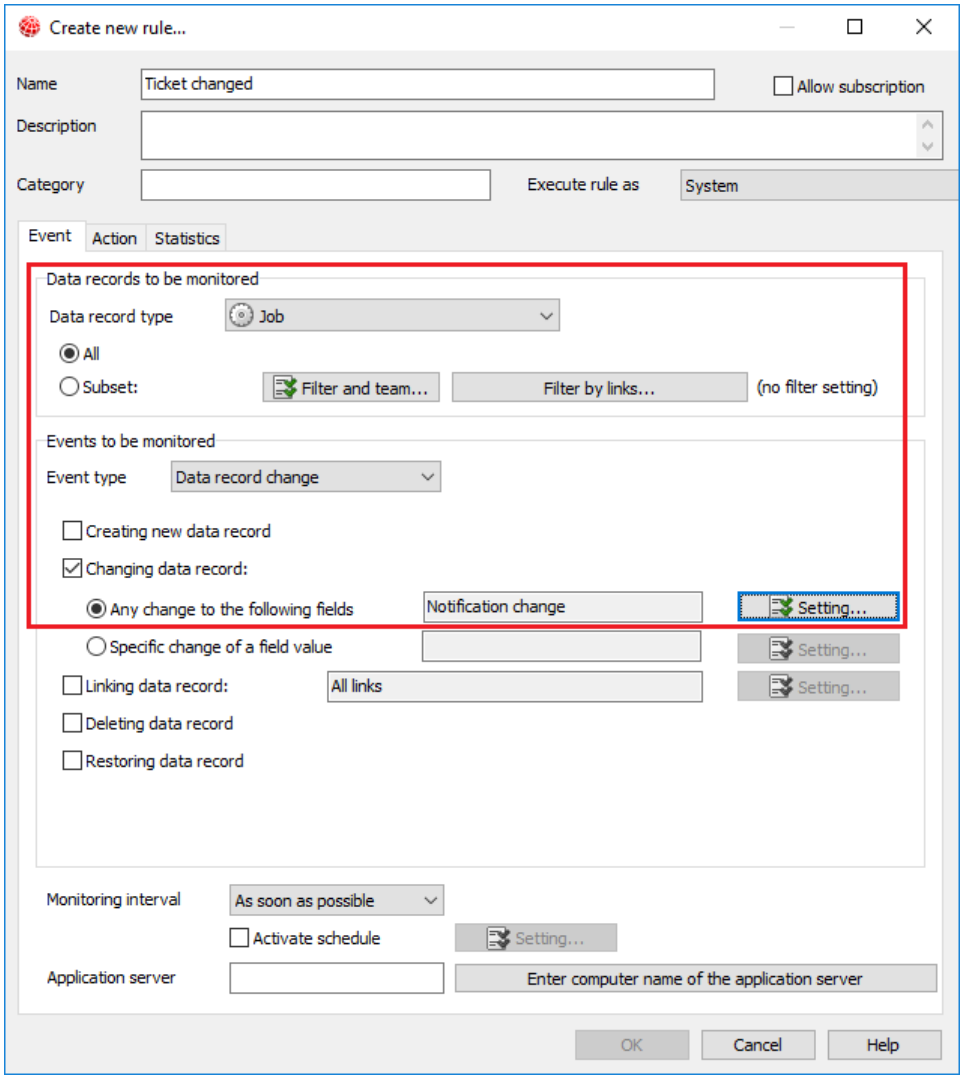
## 12.3 Notifying the submitter about changes in a ticket

You create a rule for notifying the submitter about changes in his ticket as follows.

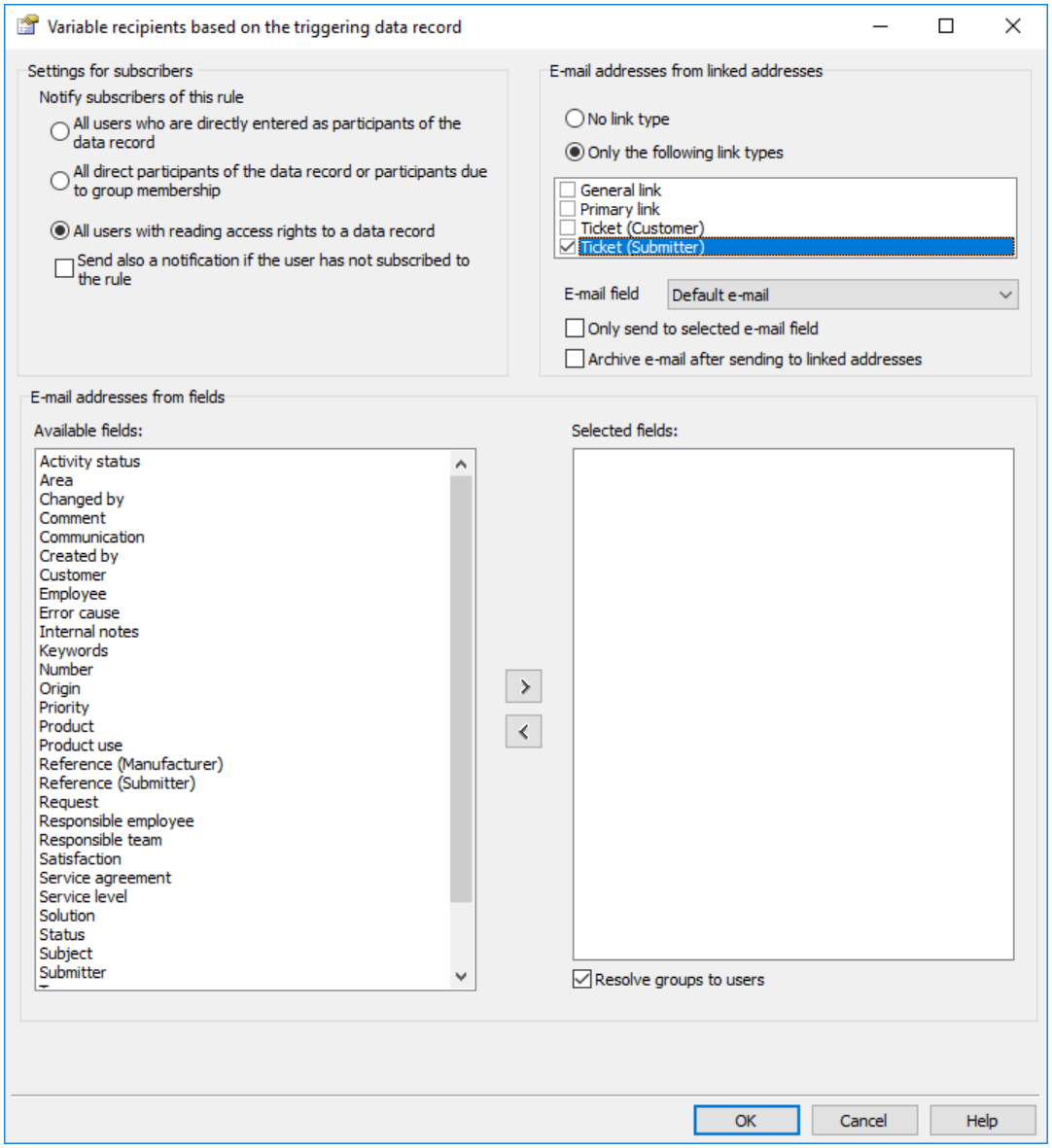
- ✓ Click **New** to create a new rule.
- ✓ Enter a meaningful name (e.g., **Ticket changed**).
- ✓ Select the **Job** data record type.
- ✓ In the **Event type** menu, select **Data record change**.
- ✓ Select the **Changing data record** event.
- ✓ Click on the **Setting** button next to the **Any change to the following fields** option.
- ✓ Select the **Notification change** field, then click **OK** to confirm.



The following settings should be visible in the **Event** tab:




- ✓ Switch to the **Action** tab.
- ✓ In the **Action** menu, select **Notification**.
- ✓ If desired, click on the **Selection** button next to the **Sender** field to change the e-mail's sender or recipient of replies.
- ✓ Click on the **Selection** button next to the **Variable recipients** field.
- ✓ Under **E-Mail addresses from linked addresses**, select **Only the following link types**.
- ✓ Select the **Ticket (submitter)** link type:




✓ Click **OK** to confirm.

✓ Remove yourself from the permanent recipients if you do not wish to receive copies of all notifications about new requests. To do this, click on the button with the icon of a red cross next to the **Permanent recipients** section.

✓ Enter the subject line and body text for the e-mail in the lower section.

If e-mails sent via the rule and replies to them should be linked with the associated ticket when the e-mails are archived, enter the key defined in the Management Console into the subject line (see "11.3.4 E-mail" on page 183).

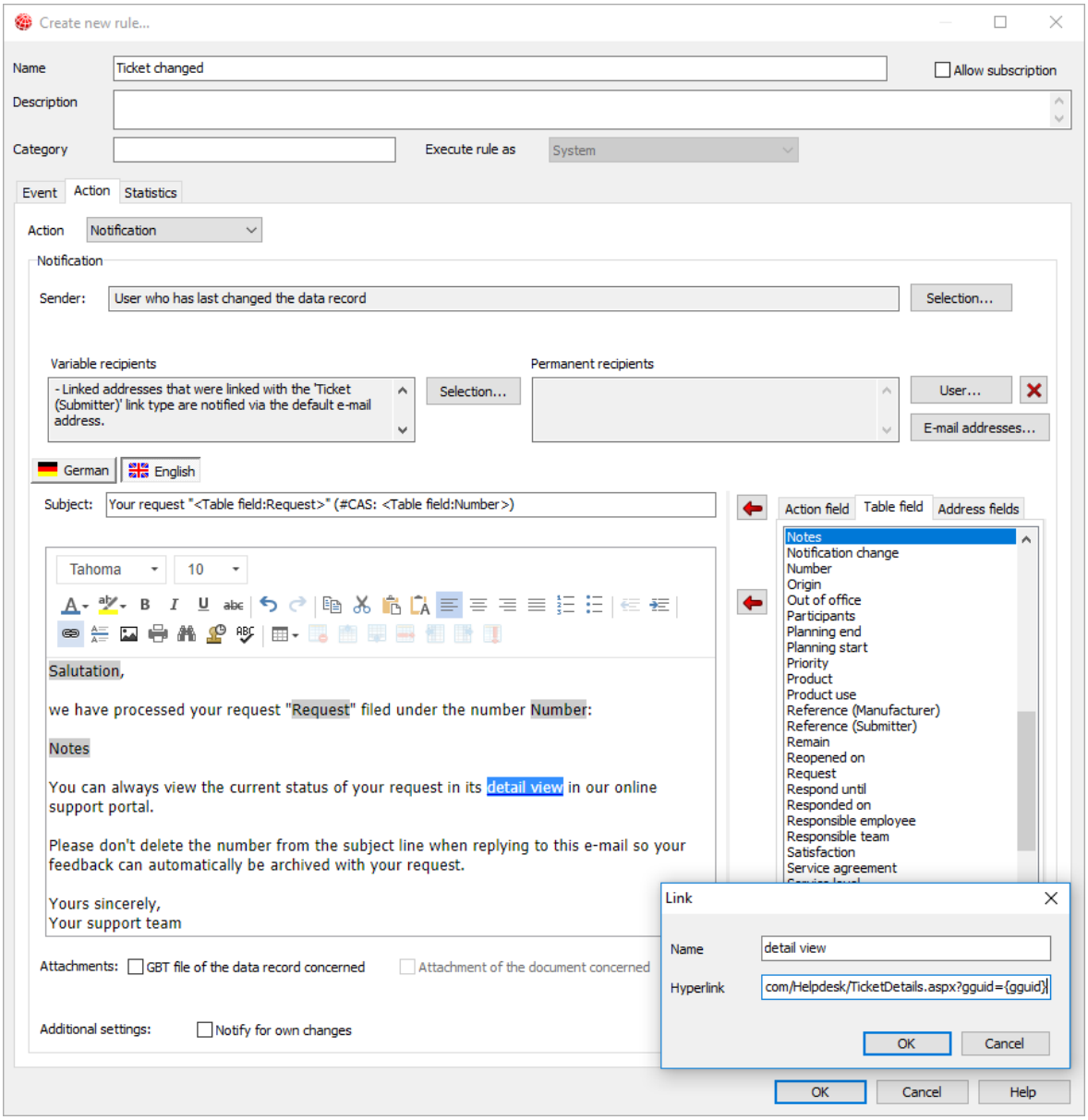
Please note that a blank space must be entered before the number (e.g., when no prefix was defined and Number was selected as field, the key is "# Number#").

If you are using Helpdesk online, you can embed a link to the ticket's detail view in the e-mail. To do this, enter the desired link text and connect it with the following link using the e-mail editor's hyperlink fuction.

```
https://helpdesk.example.com/Helpdesk/TicketDetails.aspx?gguid={gguid}
```

Replace `https://helpdesk.example.com/Helpdesk/` by your Helpdesk online system URL.

The following settings should be visible in the **Action** tab:




✓ Confirm the creation of the new rule by clicking **OK**.

✓ Confirm the activation of the new rule by clicking **Yes**.

## Notes

The notification and action service must be correctly set up and running in order to send e-mails.

The rule will be triggered whenever a user confirms the prompt "You have changed the notes or solution field. Do you wish the submitter to be informed automatically about the change?" Then the **Notification change** switch, by which the rule filters, will be set in the ticket.

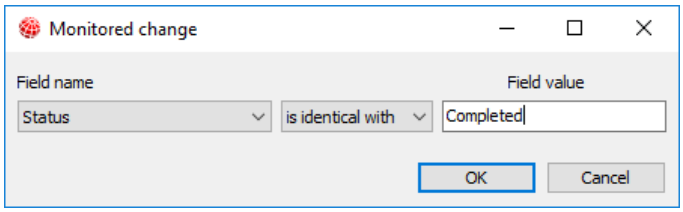
If you turn off the **Display "Inform submitter about changes" prompt** option under **Helpdesk** > **General** in the Management Console, the **Notification change** option will always be set in a ticket, whenever one of the fields **Notes** and **Solutions** changes.

The rule described in this section (change of **Notification change** in a job) will then be triggered whenever either of these two fields changes.

## 12.4 Setting up a request for feedback

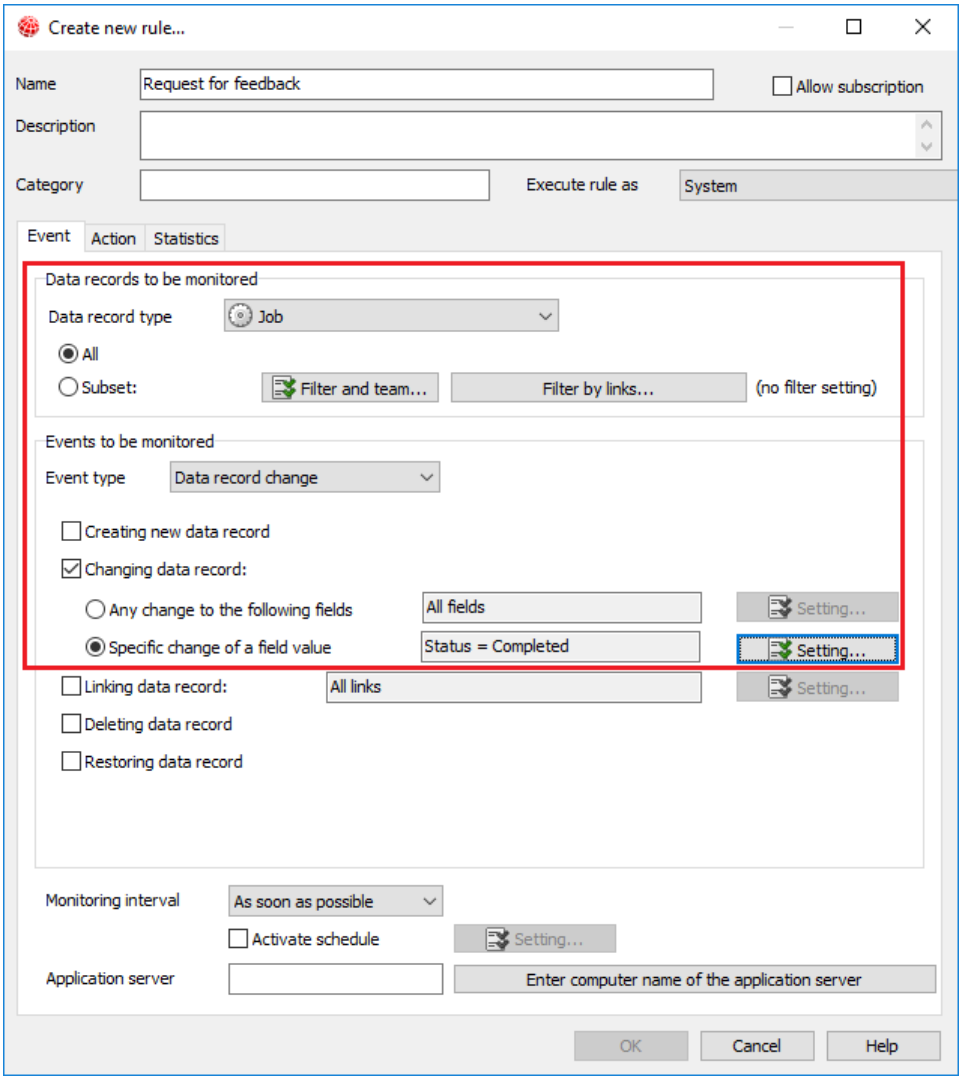
You set up the automatic request for feedback as follows.

- ✓ Click **New** to create a new rule.
- ✓ Enter a meaningful name (e.g., **Request for feedback**).
- ✓ Select the **Job** data record type.
- ✓ In the **Event type** menu, select **Data record change**.
- ✓ Select the **Changing data record** event.
- ✓ Select the **Specific change of a field value option** and click on the **Setting** button next to it.
- ✓ Select **Status – is identical with – Completed** (if you have selected another status for completed tickets under **Helpdesk** > **General**, enter that status here. You can only check for exactly one target status in a rule. If you have selected more than one status option as completion status and wish to send a request for feedback for each of these options, you must enter a separate rule for each completion status):

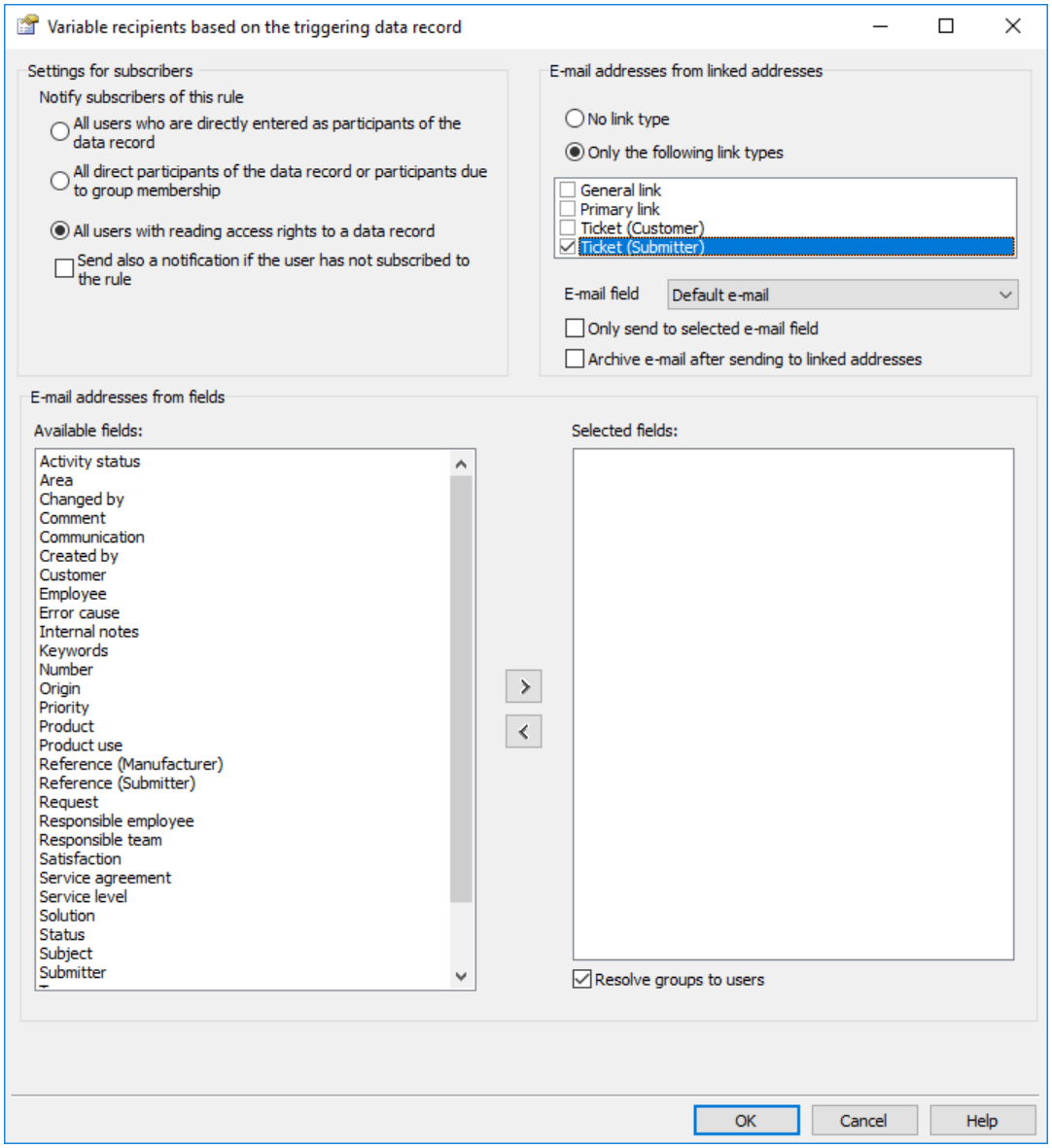



- ✓ If the specified job status is also used for jobs which are not completed tickets, enter a filter condition under **Filter and Team** (e.g., **Type – is identical with – Ticket**).

The following settings should be visible in the **Event** tab:




- ✓ Switch to the **Action** tab.
- ✓ In the **Action** menu, select **Notification**.
- ✓ If desired, click on the **Selection** button next to the **Sender** field to change the e-mail's sender or recipient of replies.
- ✓ Click on the **Selection** button next to the **Variable recipients** field.
- ✓ Under **E-Mail addresses from linked addresses**, select **Only the following link types**.
- ✓ Select the **Ticket (submitter)** link type:




✓ Click **OK** to confirm.

✓ Remove yourself from the permanent recipients if you do not wish to receive copies of all requests for feedback. To do this, click on the button with the icon of a red cross next to the **Permanent recipients** section.

✓ Enter the subject line and body text for the e-mail in the lower section.

✓ If e-mails sent via the rule and replies to them should be linked with the associated ticket when the e-mails are archived, enter the key defined in the Management Console into the subject line (see "11.3.4 E-mail" on page 183).

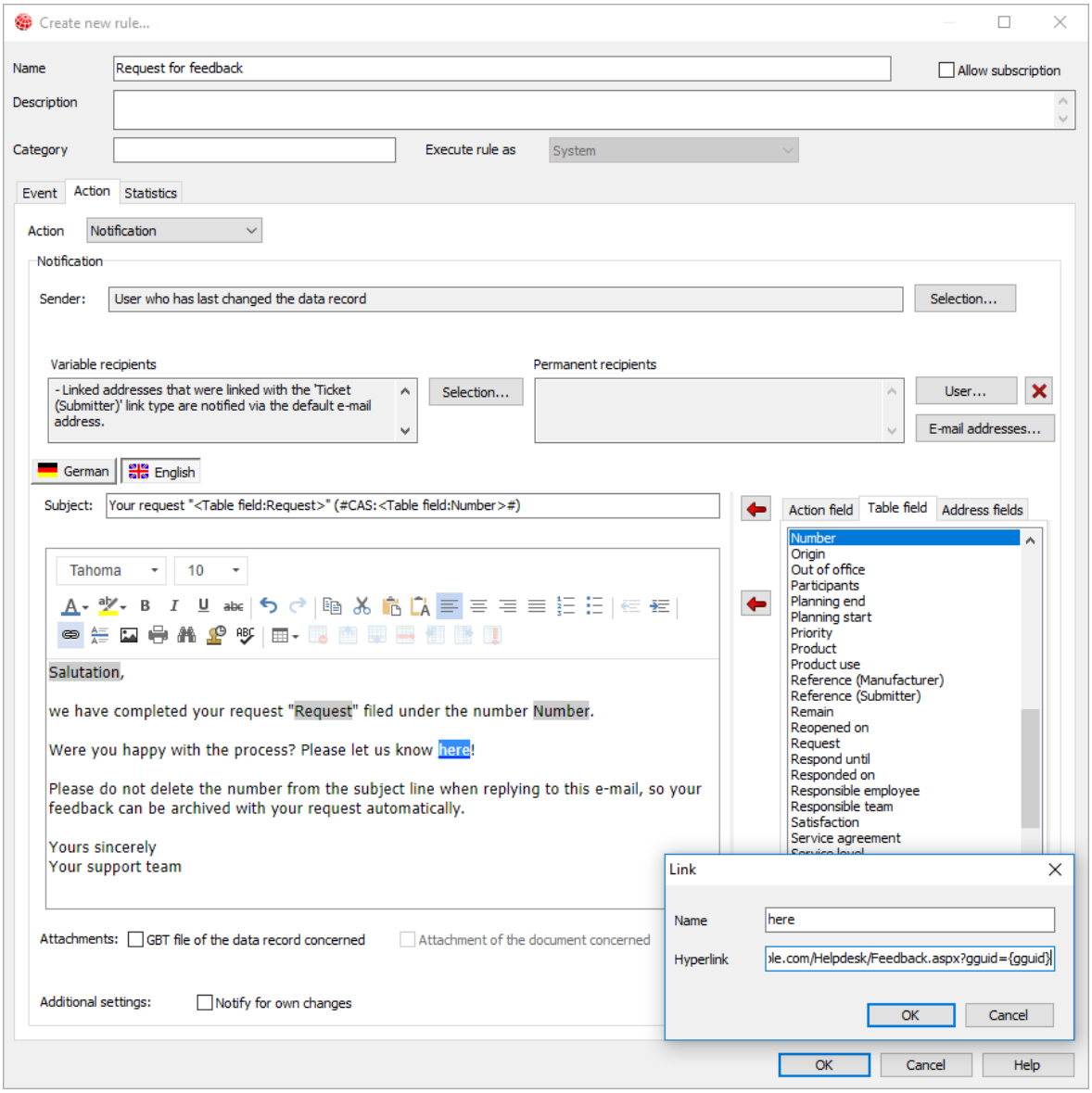
Please note that a blank space must be entered before the key field (e.g., when no prefix was defined and Number was selected as field, the key is "# Number#").

Enter a link text and embed the following hyperlink:

```
https://helpdesk.example.com/Helpdesk/feedback.aspx?gguid={gguid}
```

Replace `https://helpdesk.example.com/Helpdesk/` by your Helpdesk online system URL.

The following settings should be visible in the **Action** tab:




✓ Confirm the creation of the new rule by clicking **OK**.

✓ Confirm the activation of the new rule by clicking **Yes**.

## Notes

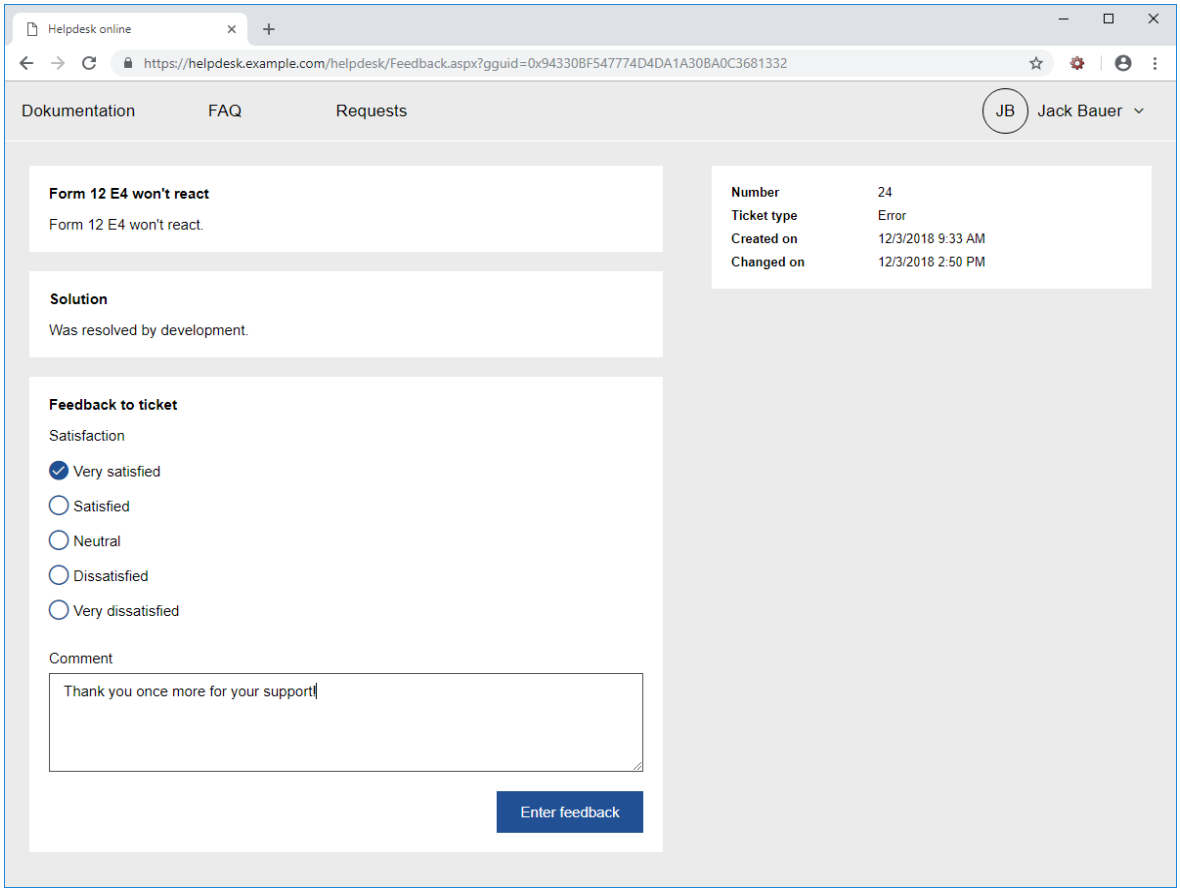
The notification and action service must be correctly set up and running in order to send e-mails. The rule will be triggered whenever a user saves a ticket after closing it by selecting the status checked by the rule.

Alternatively, you can send a link to the request for feedback via a ticket action (see "Edit e-mail" on page 31).

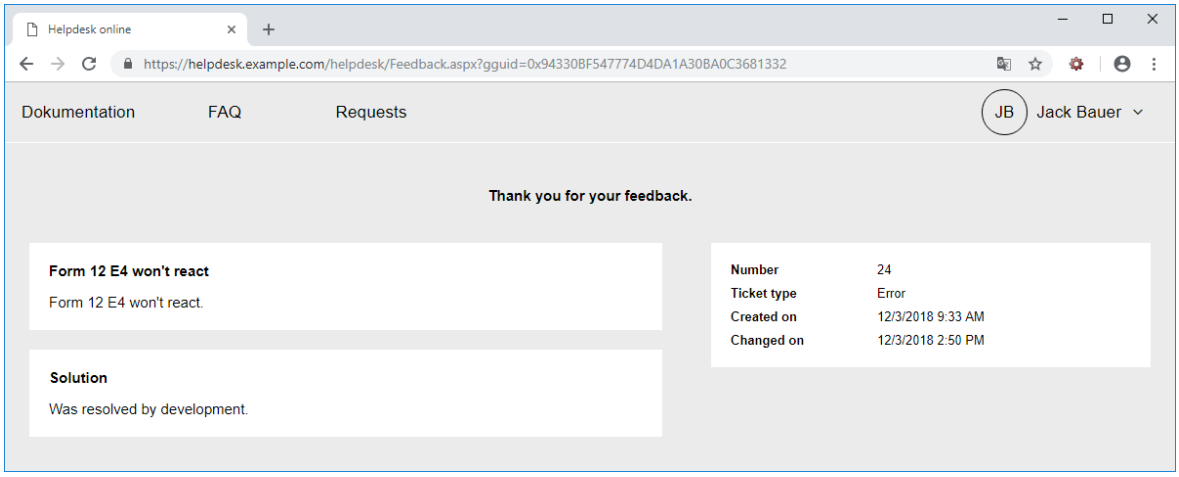
You can edit the available options via the input help for the **Satisfaction** job field in the **Database** area of the Management Console.

## 12.4.1 Request for feedback in Helpdesk online

The link in the notification about the request for feedback leads to a page in Helpdesk online where the user can specify his satisfaction.



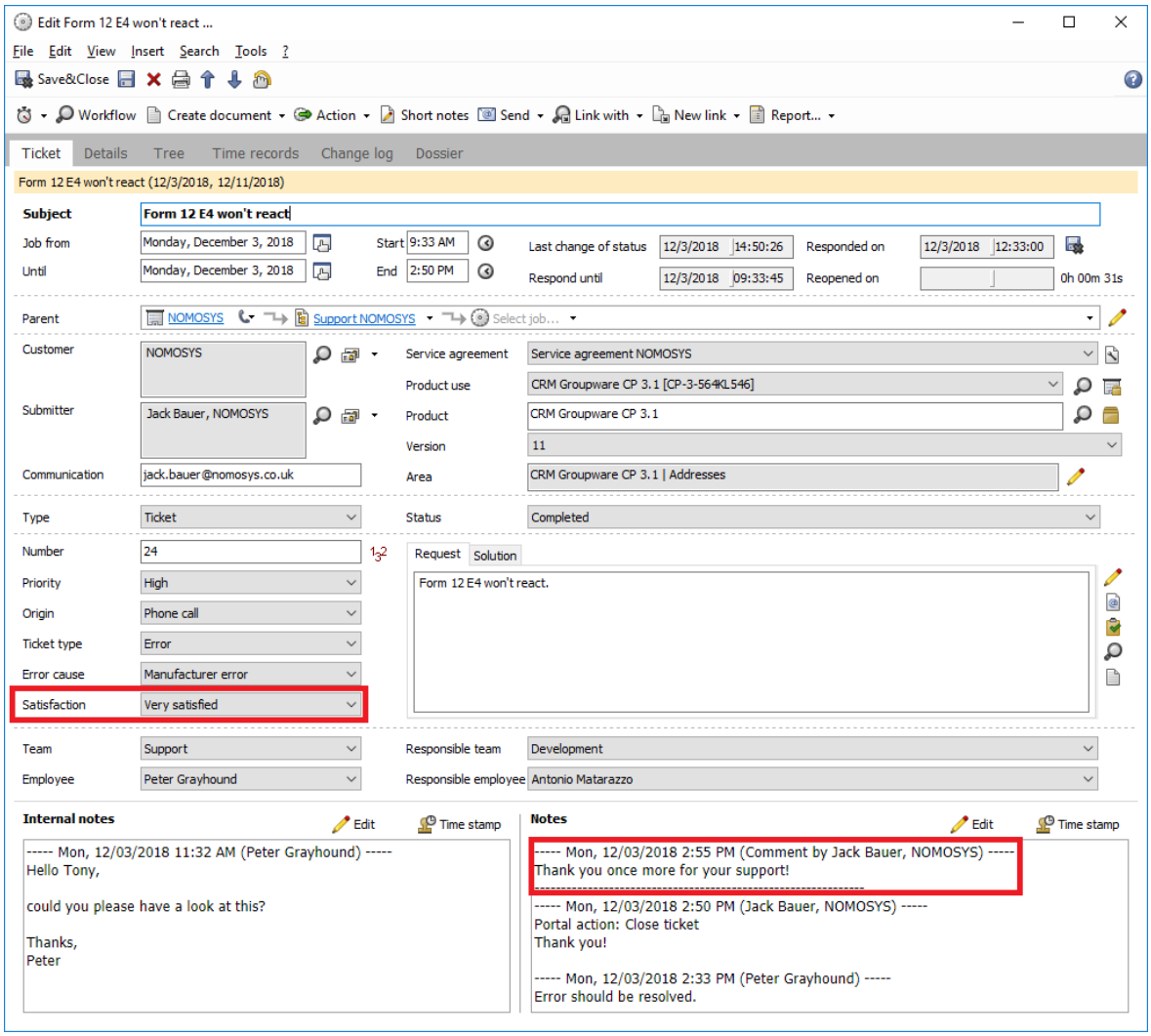
After clicking **Enter feedback** the user will receive a confirmation.



### 12.4.2 Satisfaction in CAS genesisWorld

In CAS genesisWorld, the answer is displayed in the ticket's **Satisfaction** field.

If the user has also entered a comment, it will be displayed in the ticket's notes.




## 12.5 Internal notification about expiring response deadlines

You set up a rule for the internal notification of a ticket's participants about a response deadline that is about to expire as follows.

✓ Click **New** to create a new rule.

✓ Enter a meaningful name (e.g., **Ticket escalation**).

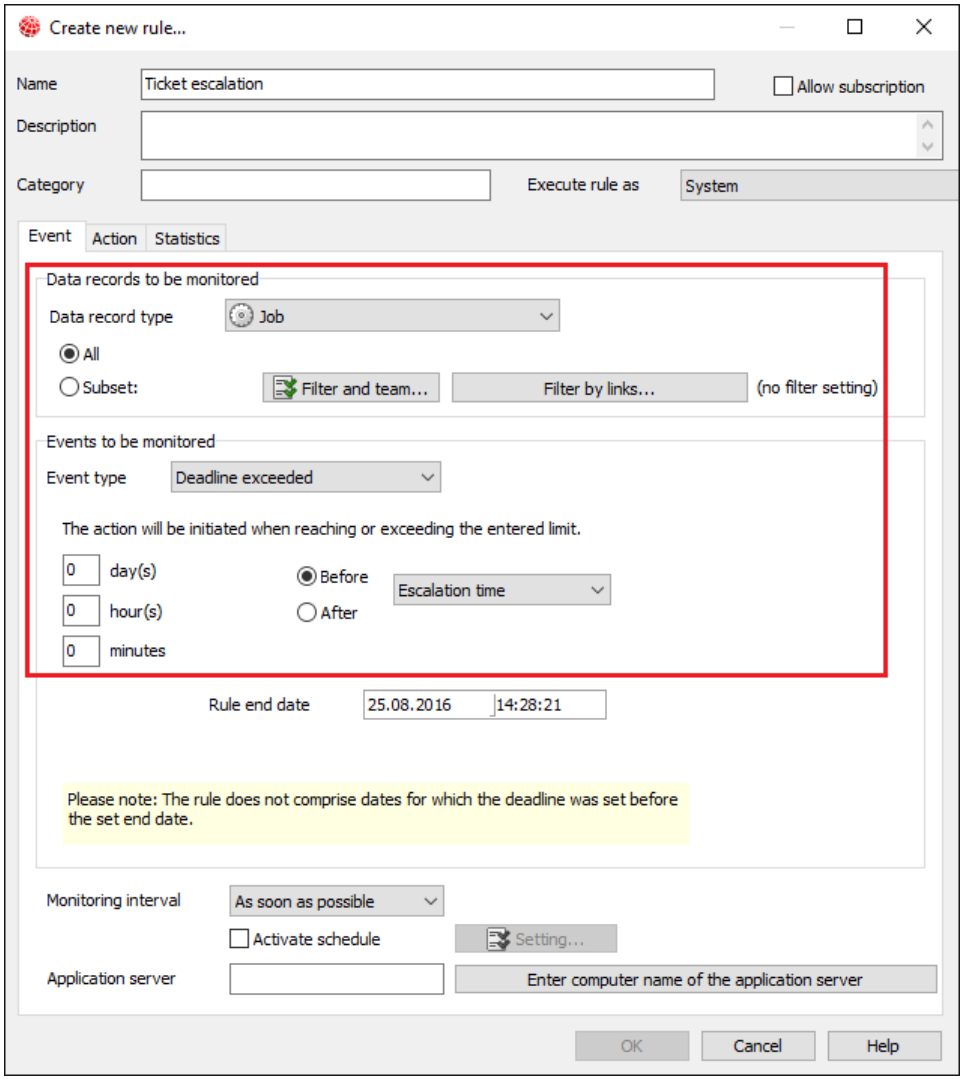
✓ Select the **Job** data record type.

In the default setting (without any filters), the internal notification occurs for all tickets for which a notification has been configured in the Helpdesk area of the Management

Console under Notification and languages, depending on the service level and priority. (see "11.2.7 Notification and languages" on page 178).

- ✓ If the internal notification should only occur for a subset of these tickets, click **Filter and team** to filter by field values and participants and/or click **Filter by links** to filter by links and enter the respectively desired filter conditions.
- ✓ Under **Event type**, select the **Deadline exceeded** event.
- ✓ Select the **Escalation time** field.

The following settings should be visible in the **Event** tab:



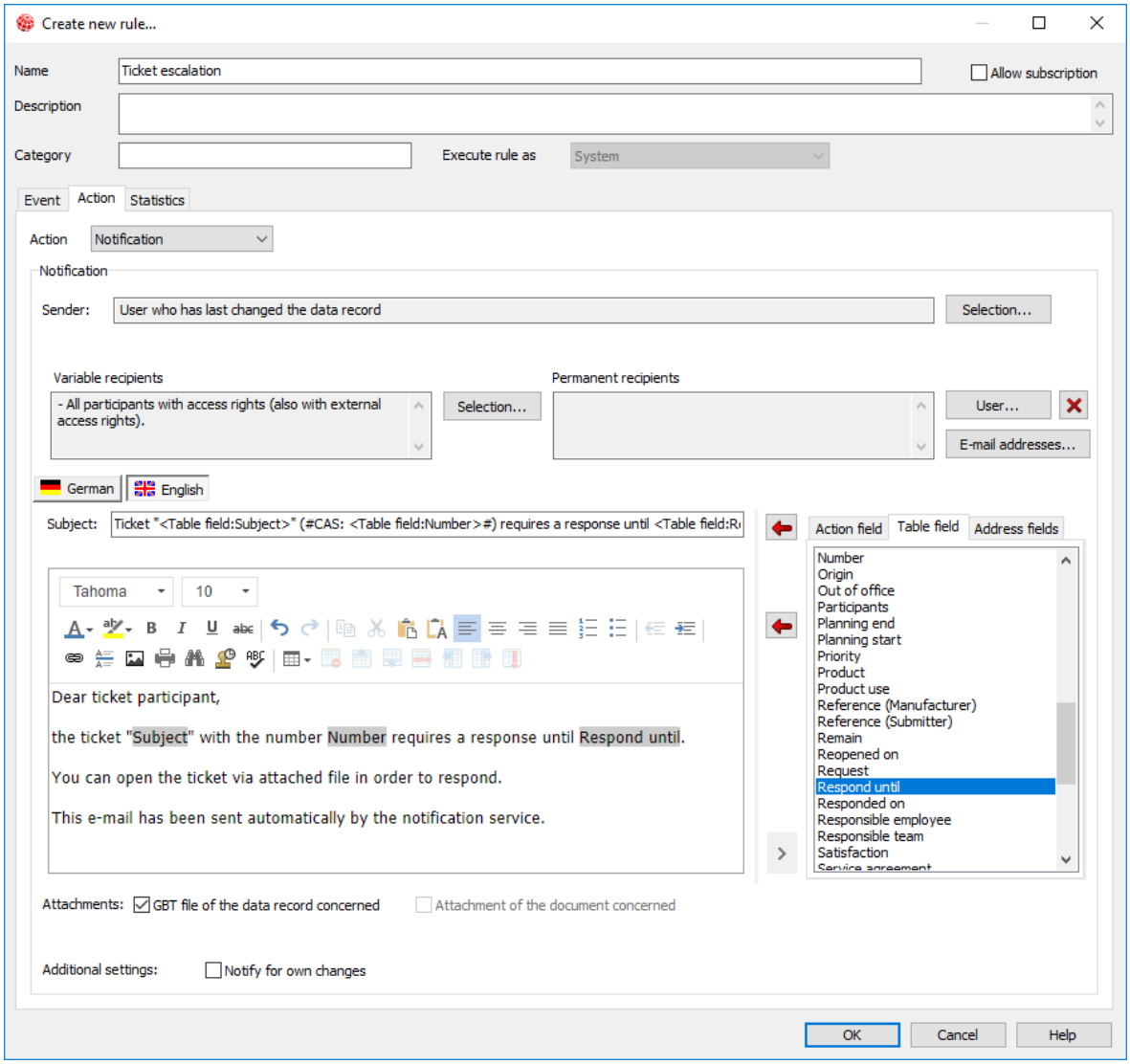

- ✓ Switch to the **Action** tab.
- ✓ In the **Action** menu, select **Notification**.

By default, the e-mail account used by the notification service will be specified as sender.

- ✓ If desired, click on the **Selection** button next to the **Sender** field to change the e-mail's sender or recipient of replies.

- ✓ Remove yourself from the permanent recipients if you do not wish to receive copies of all notifications triggered by the rule. To do this, click on the button with the icon of a red cross next to the **Permanent recipients** section.
- ✓ Enter the subject line and body text for the e-mail in the lower section.
- ✓ Under **Attachments**, select the **GBT file of the data record concerned** in order to attach a link file for opening the ticket.

The following settings should be visible in the **Action** tab:




- ✓ Confirm the creation of the new rule by clicking **OK**.
- ✓ Confirm the activation of the new rule by clicking **Yes**.

## Notes

The notification and action service must be correctly set up and running in order to send e-mails.

The rule will be triggered at the point of time before the expiration of the response deadline that has been configured for the ticket's service level and priority (see "11.2.7 Notification and languages" on page 178.)

## 12.6 Setting up a support e-mail account

The following section describes setting up a support e-mail account.

This account is set up to automatically archive inbound e-mails in CAS genesisWorld.

If possible, the archived e-mail will be associated with an existing ticket via an archiving rule based on its subject. You may enter archiving rules for e-mails in the **Miscellaneous** area of the Management Console under **E-mail** (see "11.3.4 E-mail" on page 183).

For each e-mail sent to this account which can't be associated with an existing ticket, a new one will automatically be created.

Like when manually creating a ticket for an archived e-mail, the e-mail subject will be transferred to the ticket's **Subject** field. The e-mail body will be transferred to the ticket's **Internal notes** or **Notes** field, depending on your settings. Additionally, the e-mail subject or body will be entered as the new ticket's **Request**, also depending on your settings.

The e-mail's sender will be entered in the **Communication** field.

If the e-mail address has been entered for an address record in CAS genesisWorld, that address will also be linked as **Submitter**. The associated company or, if the address is an individual contact or if company contacts are allowed as customers, the same address will then also be entered as **Customer** and as primary address. In this case, the new ticket will also be linked to the associated support project via a primary link. If that project doesn't already exist, it will be created with a primary link to the customer address.

## Notes

Please note that tickets can only be created without an address link if this has been enabled in the Management Console (see "**Submitter link to ticket must exist**" on page 150).

To send automatic notifications as described in sections 12.2 and 12.3 of this chapter to recipients for which no address record exists in CAS genesisWorld, instead of the submitter link, select the **Communication** field under **E-mail addresses from fields** as recipient.

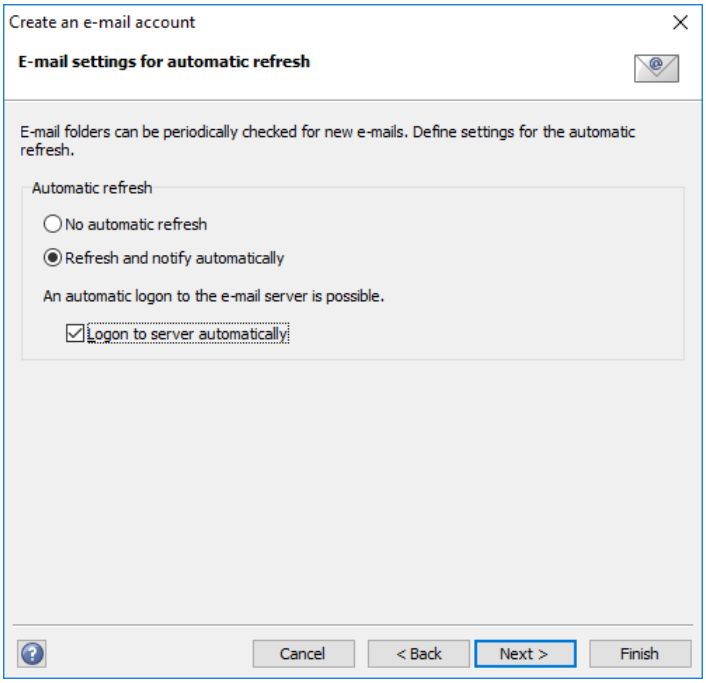
When a submitter’s address is linked to a ticket, their e-mail address will automatically be entered in this field.

When you set up a support account, you may also select a **Team** to which the tickets created this way wull be assigned. This way, separate support accounts for different support teams are possible. Additionally, you specify here the status for the new tickets.

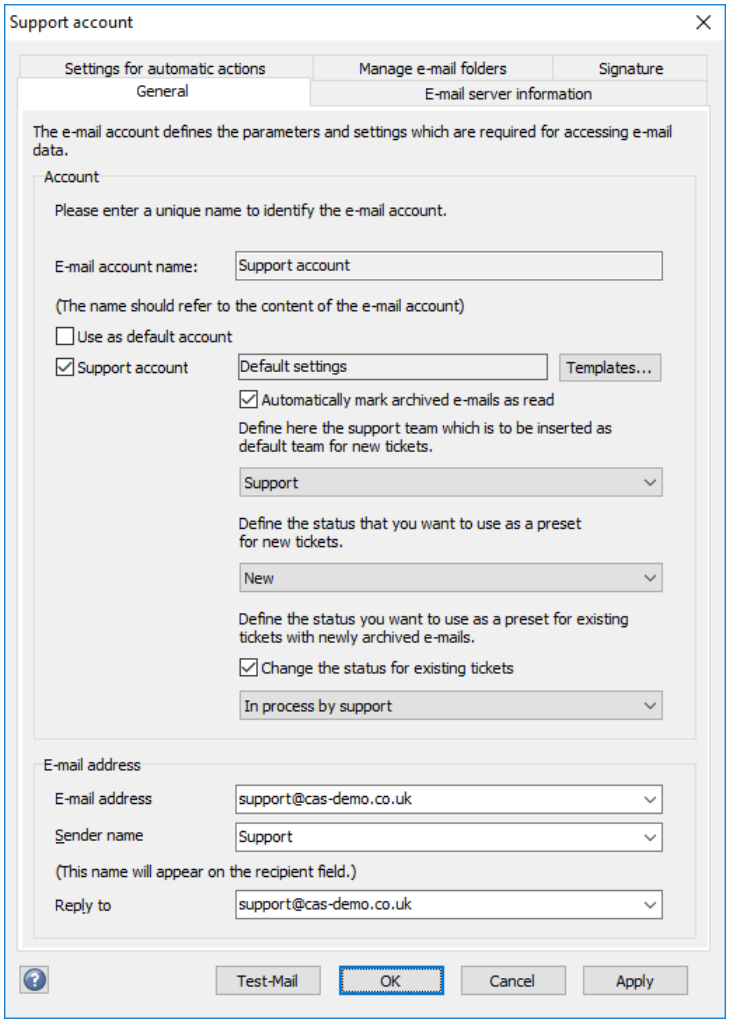
Optionally, you also select a status for existing tickets for which a new inbound e-mail is archived.

- **Rights and licenses:** Users must have a Helpdesk license assigned to configure support accounts. In addition, users also need the **Helpdesk: Is allowed to register own e-mail accounts** right. This right is activated in the Management Console > **User management** area > **Properties** window > **Other rights** tab.
- **Setting up a support account in the CAS genesisWorld Desktop Client:** The support account is set up, like any e-mail account, in the **E-mail** tab of the **Settings** window.

  Activate the **Automatic update and notify** option and the **Logon to server automatically** option so that tickets can be created for new e-mails automatically.




✓ After creating the new e-mail account, double-click its list item to open the account properties and activate the **Support account** option in the **General** tab:




- ✓ Click **Templates** and select an archiving template.
- ✓ Archived e-mails can automatically be marked as read.
- ✓ Select the support team to which to assign tickets created via this support account.
- ✓ Determine the status presetting for new tickets.
- ✓ If the status of an existing ticket should automatically be changed when an e-mail is archived for that ticket, select the **Change the status for existing tickets** option. Then, determine the desired status.
- ✓ Click **OK** to confirm your configuration of the new support e-mail account.