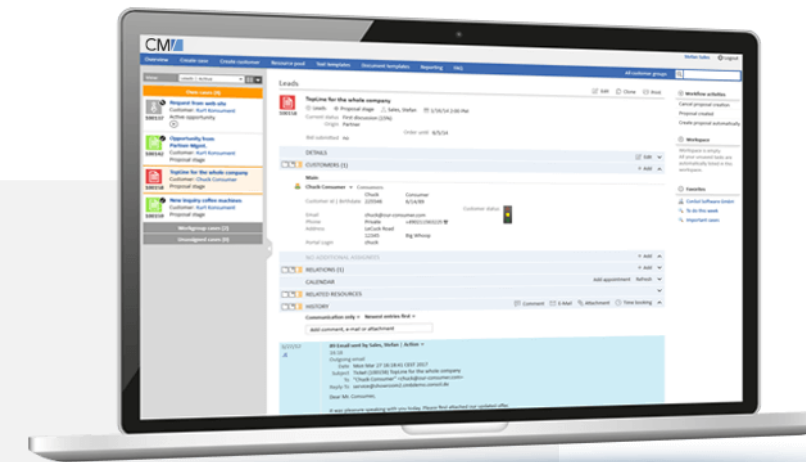


# *What's New in ConSol CM?*

New features and improvements in version 6.11



Munich | February 2017 | Product Management ConSol CM

# CM Welcome to a Landmark New Features Presentation

Dear ConSol customers, dear ConSol CM customers,

We would here like to introduce the new ConSol CM version, 6.11.

We have put great effort into the development of this special release which is a milestone in ConSol CM history.

The layout of the Web Client (the user interface for end users) has been remodeled, and the entire system performance has been increased tremendously, to name only the two most prominent new feature-complexes.

We hope you have fun reading this presentation and getting to know more about the new version. Please do not hesitate to ask us if you would like to see a live demo or if we can help you with any question regarding your ConSol CM system.

*Your ConSol CM Product Management & Sales Team*



Jan  
Zahalka



Engelbert  
Tomes



Florian  
Fiessmann



Kai  
Hinke



# CM 6.11.0 | The perspectives in this presentation

The following presentation guides you through the **new features of ConSol CM version 6.11**.  
Take the following **perspectives** to gain a good overview of what is new and has been improved.



The engineers

Tom and Susan

use the ConSol CM Web Client and have to work on tickets



Your customer

Mr. King

opens tickets in your ConSol CM system.  
Might have access to his own tickets if CM/Track is in operation



The administrator

Alf

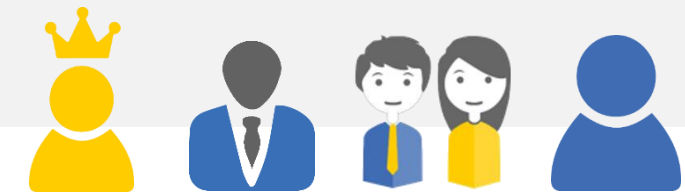
configures your ConSol CM system using the Admin Tool and the Process Designer



The manager

Marco

is interested in KPIs and good performance of your ConSol CM system



## ConSol CM version 6.11 is a milestone in ConSol CM development!

- The completely **re-designed Web Client** offers
  - modern layout
  - improved usability
  - great flexibility for customization
  - quick overview of the process performance
- Remodeled system architecture offers
  - tremendous **performance increase**
- Numerous improvements in Admin Tool and Process Designer offer
  - **more powerful and more efficient ConSol CM configuration** and management
  - improved business process modelling capabilities
- Various CM/Track (ConSol CM portal) improvements offer
  - improved ticket and request handling using the portal for **happier customers**

# CM 6.11.0 | New Layout of the Web Client

Release Notes 6.11.0,  
sections 1.2.1 and 2.3.1



Work with a completely remodeled Web Client layout – have more fun and save time

The screenshot displays the CM 6.11.0 Web Client interface. The top navigation bar includes links for Overview, Create new ticket, Create customer, Resource pool, Text templates, Reporting, ConSol, and Help. A search bar is located on the right. The left sidebar shows a list of tickets under 'Own tickets (39)' and 'Workgroup tickets (13)'. The main content area displays a 'Service case' for 'Problems with my PC' (ID 100199). The case details include a high priority, a desired deadline of 7/24/15 4:00 PM, and a request type of 'TechnicalProblem'. Below the details, there are sections for 'CUSTOMERS (1)', 'RELATIONS (1)', 'RELATED RESOURCES (2)', and 'HISTORY'. The right sidebar contains 'Workflow activities', 'Workspace', and 'Favorites'.

*This is the new standard ConSol CM skin.  
You can have your company's skin implemented  
easily.*



# 6.11.0 | New Layout of the Web Client

Release Notes 6.11.0,  
sections 1.2.1 and 2.3.1



Use the intuitive new user interface with more graphical support – think about the service not about the application

The screenshot displays the CM web client interface. The top navigation bar includes links for Overview, Create new ticket, Create customer, Resource pool, Text templates, Reporting, ConSol, and Help. The left sidebar shows a list of tickets under 'Own tickets (39)' and 'Workgroup tickets (13)'. The main content area displays a 'Service case' details view for ticket 100199, titled 'Problems with my PC'. The details include the customer 'Skywalker, Luke', priority 'HD Priority high', and desired deadline '7/24/15 4:00 PM'. The 'Request Type' is 'TechnicalProblem'. The top right of the details view features buttons for 'Edit', 'Clone', and 'Print', which are circled in yellow. Below the details, there are sections for 'CUSTOMERS (1)', 'RELATIONS (1)', 'related by', 'CALENDAR', 'RELATED RESOURCES (2)', and 'HISTORY'. The bottom right corner shows a list of 'myOpenTickets'.

Use new icons for basic functions  
– work intuitively and efficiently



# 6.11.0 | Web Client Layout More Flexible

Release Notes 6.11.0,  
sections 1.3.12 and 2.2.2



Your company uses specific terms for service cases? Or different wording in different queues? No problem!

All key terms in the Web Client can be customized

*Use the wording of your processes  
– adapt the entire user interface to your company's needs*





# 6.11.0 | Web Client Layout More Flexible

Release Notes 6.11.0,  
sections 1.3.12 and 2.2.2



Your company uses specific terms for service cases? Or different wording in different queues? No problem!

All key terms in the Web Client can be customized

The screenshot displays the CM Web Client interface with several key elements highlighted by yellow circles to demonstrate customization capabilities:

- Open new case:** A button in the top navigation bar.
- Service request:** A label in the top navigation bar.
- Agent:** A dropdown menu in the top navigation bar.
- Own cases (39):** A button in the left sidebar.

The interface also shows a list of cases on the left, a detailed view of a case in the center, and a sidebar on the right with various options like 'Workflow activities', 'Workspace', and 'Favorites'.

*Use the wording of your processes  
– adapt the entire user interface to your company's needs*





Benefit from improvements of the user interface, based on long-term experience with Web Client usability

Two examples:

The screenshot displays the CM Web Client interface for a company named 'ConSol GmbH'. The interface is divided into several sections:

- Company Details:** Shows the company name 'ConSol GmbH', address 'Franziskanerstr. 38, 81543 München', and website 'http://www.consol.de'.
- Tickets Section:** Includes a filter 'Show: Tickets of Company and Contacts' and a status filter 'Status: Open tickets'. A dropdown menu is open, showing options: 'Tickets of Company', 'Tickets of Contacts', 'Closed tickets', and 'Open and closed tickets'.
- Tickets Table:** A table with columns 'Engineer' and 'Main Customer'. It lists four tickets: 'Tester, Tony' (MAILER-DAEMON@consol.de), 'ServiceDesk, Susan' (Mr Max Mustermann), and 'Manfred Musterkunde'.
- Comments and Attachments Section:** Includes a 'Comments' tab and an 'Attachments' tab. A 'New' comment form is visible, with a text area containing the text 'This comment can use an entire text area for new information about the customer'. Below the form are 'Add' and 'Cancel' buttons. A 'List of comments' section shows 'This company does not have any comments.'

Handwritten text in blue ink on the left side of the screenshot reads: 'Work on the cases in less time with more fun'.

# CM 6.11.0 | Web Client Usability Improved

Release Notes 6.10.5.4,  
section 5.2.1



You do not remember the exact spelling of one of your customers' names? No problem! Use the phonetic search!

The screenshot shows the CM web client interface. The top navigation bar includes links for Overview, Create new ticket, Create customer, Asset management, Text templates, Reporting, ConSol, Help, and All customer groups. A search bar is located next to the 'All customer groups' link. The main content area displays a ticket titled 'Printer does not print' with details such as HD Priority, high, Module DWH, and Category Software | Office | Microsoft Office 2013. Below the ticket details, there is a section for CUSTOMERS (2) showing a list of customers. The customer 'Skywalker, Luke' is highlighted. A yellow circle highlights the search bar in the 'All customer groups' dropdown, and another yellow circle highlights the search results for 'Skywalker, Luke'.

TICKETS		
ServiceDeskSpecialTasks	100313-002	Windows server update project
	100317	New Ticket for HP Printer: 6
ServiceDesk	100325	New office: please provide 3 Laptops and 6 monitors
	100598	Portal should be updated
	100318	Question about trade fair
	100293	Several printers not available
	100198	New Ticket for Resource: 3
	100313-001	Network errors
	100595	Please test autocomplete list
HelpDesk 1st Level	100364	Printer does not print

CUSTOMERS	
ResellerCustomer (Reseller)	Skywalker,Leia
	Skywalker,Luke
MyCustomer (MyCustomerGroup)	Sabine Skiläuferin

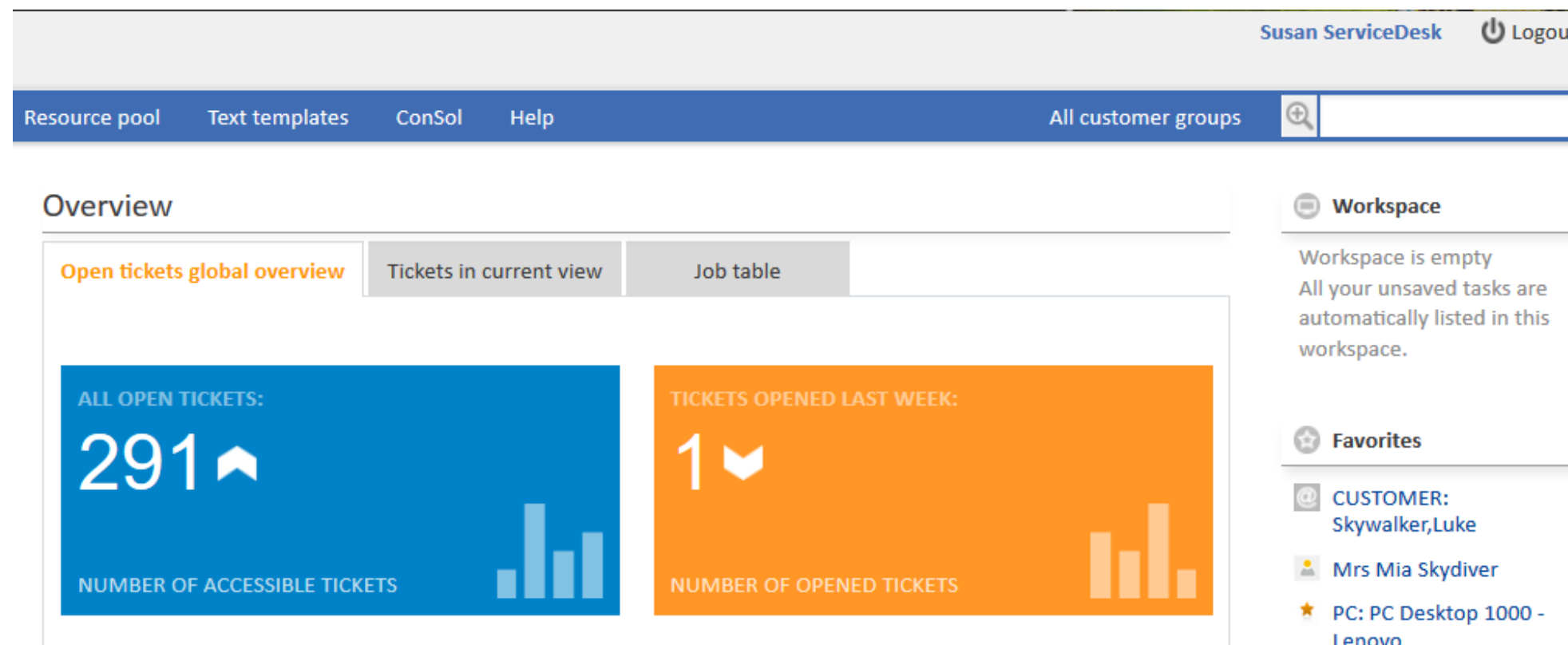
RESOURCES	
Skirts	Skirt:

Buttons: Show all, Create new ticket, Create customer

You do not have to remember the exact spelling – just type what you know (CM 6.10.5.4)



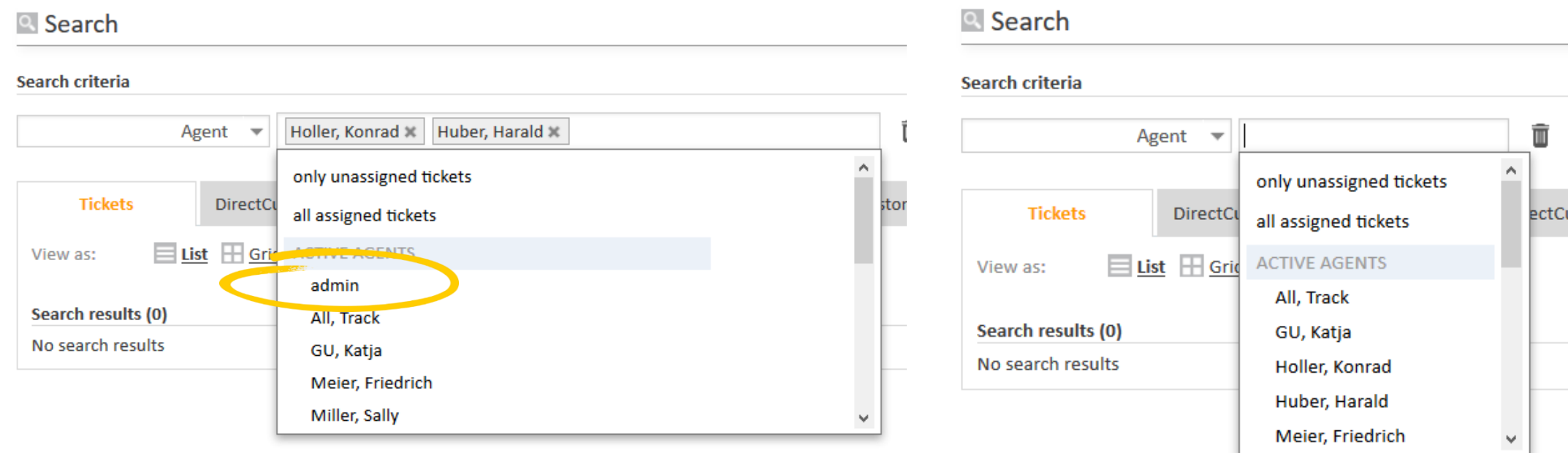
You want to see the most important figures about your process performance? Use the new KPI widgets!



*Gain a quick overview of the performance of your business processes. The widgets will be adapted to your company's requirements.*



You do not want to provide access to tickets of key users in the search? Just set one configuration value and defined users will not be available in the Detail Search



*Add another point to your  
"secure ConSol CM" strategy*



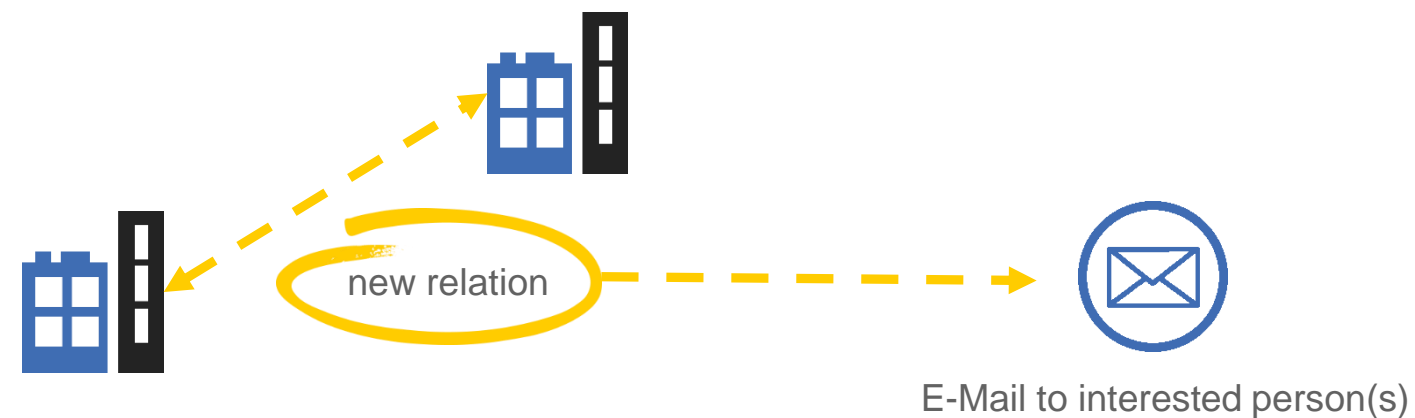
Relation Actions help you not to miss important changes in your Customer Relationship Management!

A Relation Action is executed when a relation is created or deleted.

Feature since 6.10.5.4

For example:

- A service engineer creates a new relation between a customer and a certain SLA (a resource)
  - when this happens, the sales rep of this customer is informed via e-mail
- A sales engineer creates a new relation "business cooperation" between two companies
  - the responsible manager is informed via e-mail



# CM 6.11.0 | CM/Track Improvements

Release Notes 6.10.5.4, section 5.3.11 and Release Notes 6.11.0.1, sections 1.2.15 and 2.2.5



Numerous CM/Track improvements have been introduced – this improves your service for your customers

- improved ticket list filtering (since version 6.10.5.4)
- the customer can request a new password easily
- better username and password protection

CM.Track

Please sign in

Username

Password

[Forgot your password?](#)

Sign in

CM.Track Tickets Create ticket FAQ Skywalker, Luke

Show My tickets Status Open + Closed Sort by Queue ↑↓ Please ins

View per page 20

100380	Please install new version of Windows	New ticket	ServiceDesk	Created: Apr 11, 2016
100575	Collection of SD tickets for today	Work in progress	ServiceDesk	Created: Aug 15, 2016
100597	New Features Ticket #1	New ticket	ServiceDesk	Created: Oct 12, 2016
100364	Printer does not print	Support	HelpDesk 1st Level	Created: Feb 8, 2016
100393	Please install Office 2013 on my computer	Qualify	HelpDesk 1st Level	Created: May 13, 2016

View per page 20



## 6.11.0 | Admin Tool Script Editor Optimized

Release Notes 6.11.0,  
sections 1.3.27 and 2.2.8



The Script Editor in the Admin Tool now offers syntax highlighting, code completion, code checking and line numbers

```
Source
1 import com.consol.cmas.common.model.EngineerRole
2 import com.consol.cmas.common.service.EngineerRoleRelationService
3
4
5 // getting and setting engineer:
6 def new_eng = engineerService.getByName("Huber")
7
8 // -- check if new engineer has access permissions to queue. If not he cannot get the ticket
9 // -- and an error message is displayed
10
11 Set<EngineerRole> myroles = engineerRoleRelationService.getRolesForEngineer(new_eng)
12
13 def role_ok = false
14
15 myroles.each { role ->
16     def rolename = role.getName()
17     log.info 'ROLE IS NOW' + rolename
18     if (rolename.equals("ServiceDesk")) {
19         role_ok = true
20     }
21 }
22
23
24 if(role_ok == true) {
25     ticket.setEngineer(new_eng)
26 } else {
27     log.info("The engineer Huber does not have the required access permissions")
28     ticket.setEngineer(null)
29 }
30
31 // getting and setting more data:
32 ticket.set("serviceDesk_fields.desiredDeadline", null)
33 /*
34 def orig_tic = workflowApi.getOriginalTicket()
35 def subj = "Copy of " + orig_tic.getSubject()
36 */
```

*Write your ConSol CM scripts  
error-free and efficiently*





Bring more flexibility into your business processes, be prepared for adaptive case management – use Scope Activities for actions which are not strictly bound to a certain order of process steps

**Ticket** Edit Clone Print

**Time booking incorrect**

100342 HelpDesk 1st Level Qualify ServiceDesk, Susan 12/17/15 12:27 PM

HD Priority normal Module DWH

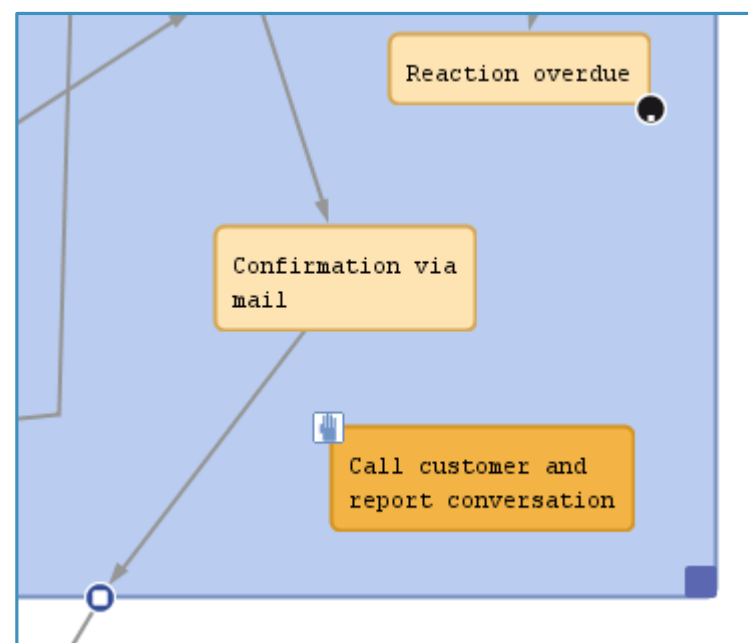
Reaction time 12/18/15

**Workflow activities**

- Close immediately
- Deny ticket
- Ask for approval
- Call customer and report conversation**

Web Client

*Optimize your business processes and allow flexible actions of your engineers*

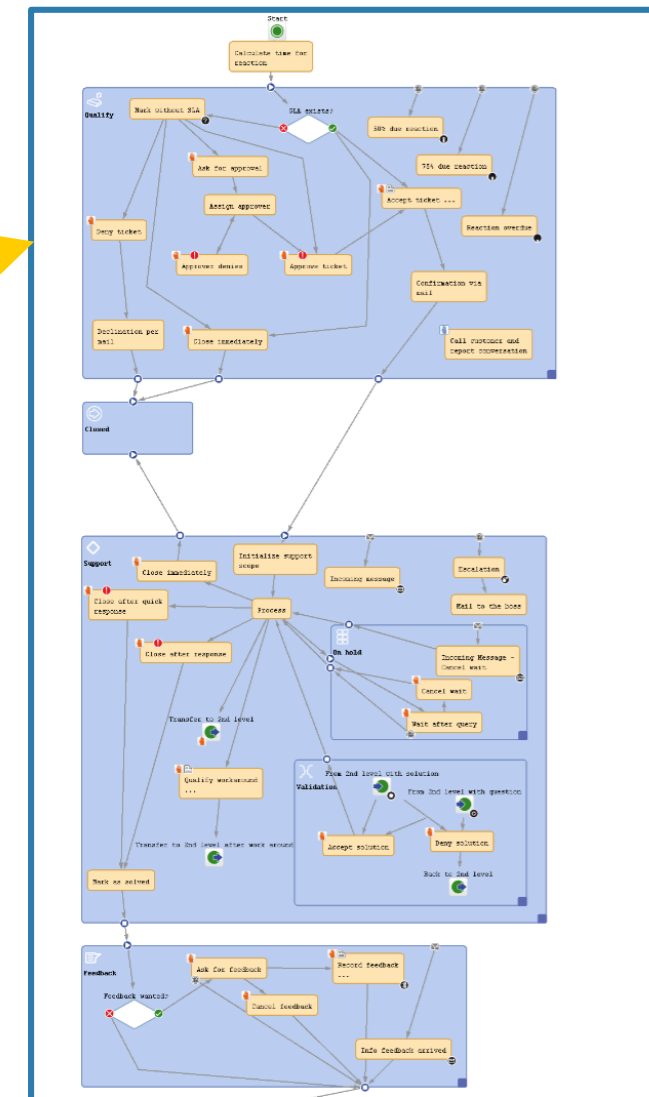
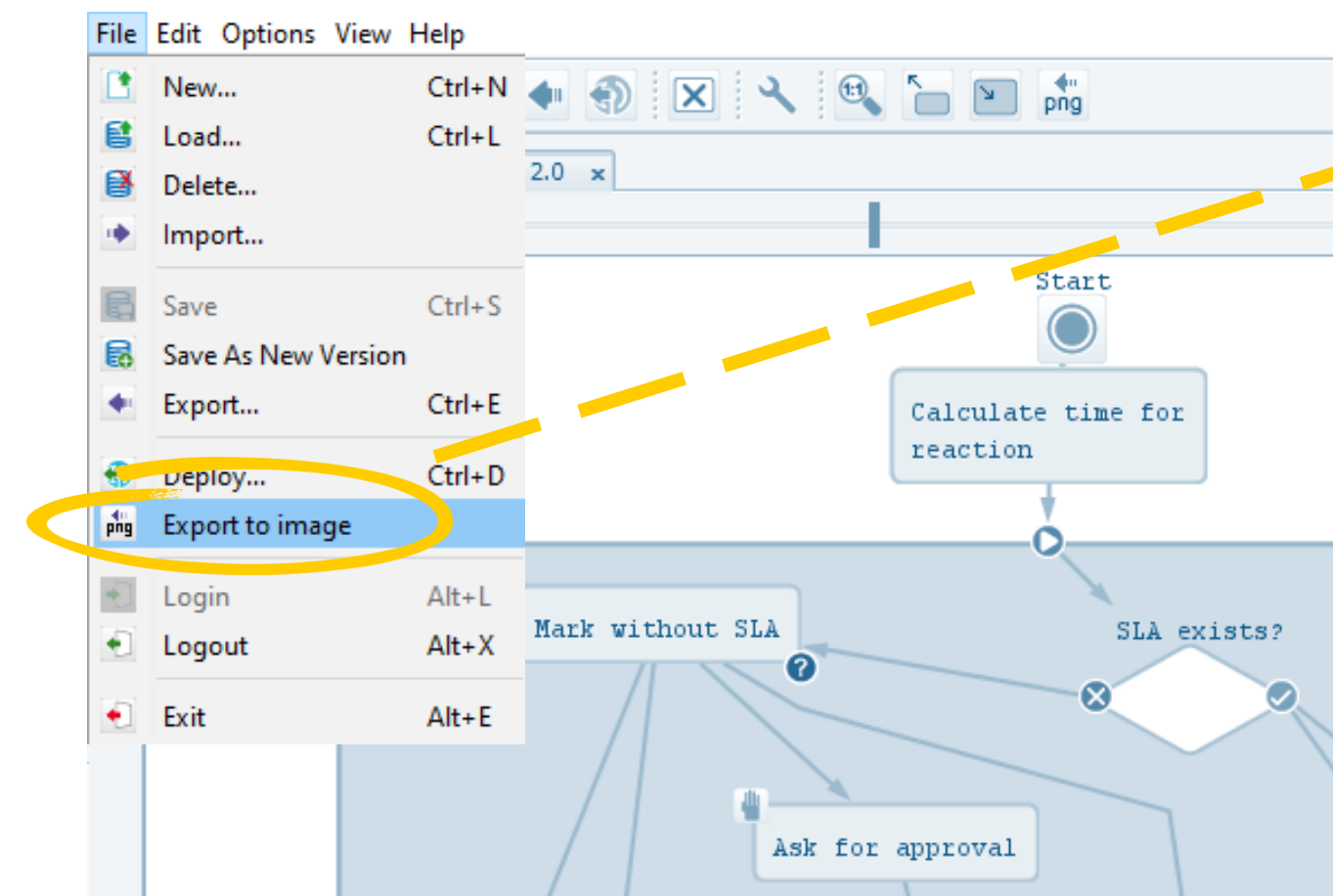


Process Designer

Properties	
Properties	
name	Call_customer_and_report_convers
label	Call customer and report convers...
description	
sort index	64
overlay	
precondition	
script	
activity type	Scope
history visibility	Automatic
disable auto update	Manual



You had to work with workflow screenshots to document your business processes? Not anymore!  
Export any workflow directly from the Process Designer as image



Optimize your ConSol CM  
documentation thereby using less time



# 6.11.0 | New Log Files: audit.log and transfer.log

Release Notes 6.11.0,  
sections 1.2.12 and 2.2.9



You are an administrator and want to know exactly what's going on in ConSol CM administration? You want to monitor scene transfer?

Three new log files support you.

## AUDIT.LOG

logs changes made using

- the Admin Tool
- the Process Designer

## TRANSFER.LOG

logs info about

- scene export and import operations

## ACCESS.LOG

- logs information about access to the Web Client

```
2017-02-06 09:25:24,612 INFO [d.MethodExecutionJournalAspect] [admin-- {ses
sionId}] 0ms Executed: com.consol.cmas.app.admin.common.service.UserAdminSer
vice.onAuthenticationSuccess[UserDetails{userName='admin', password='[NOTSET
]', locale=en_US, id=0, source=ADMIN_TOOL}]
2017-02-06 09:28:01,174 INFO [d.MethodExecutionJournalAspect] [admin-- {ses
sionId}] 54179ms Executed: com.consol.cmas.app.admin.common.service.DeployAd
minService.exportData[com.consol.cmas.app.admin.common.vo.deploy.ExportConfi
gDetails@7ca86643]
2017-02-06 11:23:05,180 INFO [d.MethodExecutionJournalAspect] [admin-- {ses
sionId}] 1ms Executed: com.consol.cmas.app.admin.common.service.UserAdminSer
vice.onAuthenticationSuccess[UserDetails{userName='admin', password='[NOTSET
]', locale=en_US, id=0, source=ADMIN_TOOL}]
2017-02-06 11:23:42,341 INFO [d.MethodExecutionJournalAspect] [admin-- {ses
sionId}] 5ms Executed: com.consol.cmas.app.admin.common.service.Localization
AdminService.update[LocalizedLabelDetails{id=24, name='cmweb.main.engineer.b
ase.initcap'}]
2017-02-06 11:23:42,646 INFO [d.MethodExecutionJournalAspect] [admin-- {ses
sionId}] 225ms Executed: com.consol.cmas.app.admin.common.service.Localization
onAdminService.createOrUpdateLocalizedProperties[[com.consol.cmas.app.admin.
common.vo.localization.LocalizedPropertyDetails@eabd2f85, com.consol.cmas.ap
p.admin.common.vo.localization.LocalizedPropertyDetails@67b56ad]]
2017-02-06 11:23:57,214 INFO [d.MethodExecutionJournalAspect] [admin-- {ses
sionId}] 0ms Executed: com.consol.cmas.app.admin.common.service.Localization
AdminService.update[LocalizedLabelDetails{id=23, name='cmweb.main.engineer.b
ase.initlow'}]
2017-02-06 11:23:57,419 INFO [d.MethodExecutionJournalAspect] [admin-- {ses
sionId}] 166ms Executed: com.consol.cmas.app.admin.common.service.Localization
onAdminService.createOrUpdateLocalizedProperties[[com.consol.cmas.app.admin.
common.vo.localization.LocalizedPropertyDetails@67b56ac, com.consol.cmas.ap
p.admin.common.vo.localization.LocalizedPropertyDetails@eabd2f84]]
2017-02-06 11:24:15,521 INFO [d.MethodExecutionJournalAspect] [admin-- {ses
sionId}] 0ms Executed: com.consol.cmas.app.admin.common.service.Loca
AdminService.update[LocalizedLabelDetails{id=26, name='cmweb.main.en
lural.initcap'}]
@
@
@
"audit.log" 101L, 27401C
```





# 6.11.0 | New DWH Management Panel

Release Notes 6.11.0,  
section 2.2.6



Use the optimized Data Warehouse Management in the Admin Tool. Gather all important information about DWH operations at a glance

ConSol<sup>®</sup>  
CM6

Home

Access and Roles

Lists

Tickets

Customers

Customer Groups

Data Models

Actions

Roles

Relations

Resources

Global Configuration

Data Warehouse

Administration

Tasks

Services

Email

System

Administration

Actions

Since:  Type: All Actions

CM Status: All CMRF Status: All

Type	From	To	CM Status	CMRF Status
INITIALIZATION	1/26/17 11:29 AM	1/26/17 11:29 AM	SUCCESS	SUCCESS
TRANSFER	1/1/70 1:00 AM	1/27/17 1:40 PM	SUCCESS	SUCCESS
TRANSFER	1/1/70 1:00 AM	2/3/17 1:57 PM	SUCCESS	SUCCESS
UPDATE	2/3/17 1:57 PM	2/3/17 2:14 PM	SUCCESS	ACTIVE

Details

CM Progress

Finished successfully

CMRF Progress

91.89%

Parameters

Creation date: Feb 3, 2017 2:19:08 PM

Type: UPDATE

From: Feb 3, 2017 1:57:31 PM

To: Feb 3, 2017 2:14:14 PM

CM Status: SUCCESS

CMRF Status: ACTIVE

Comment:

CM

Package Size: 1,000

Retry Count: 1

CMRF

Cache Size: 10,000

Retry Count: 1

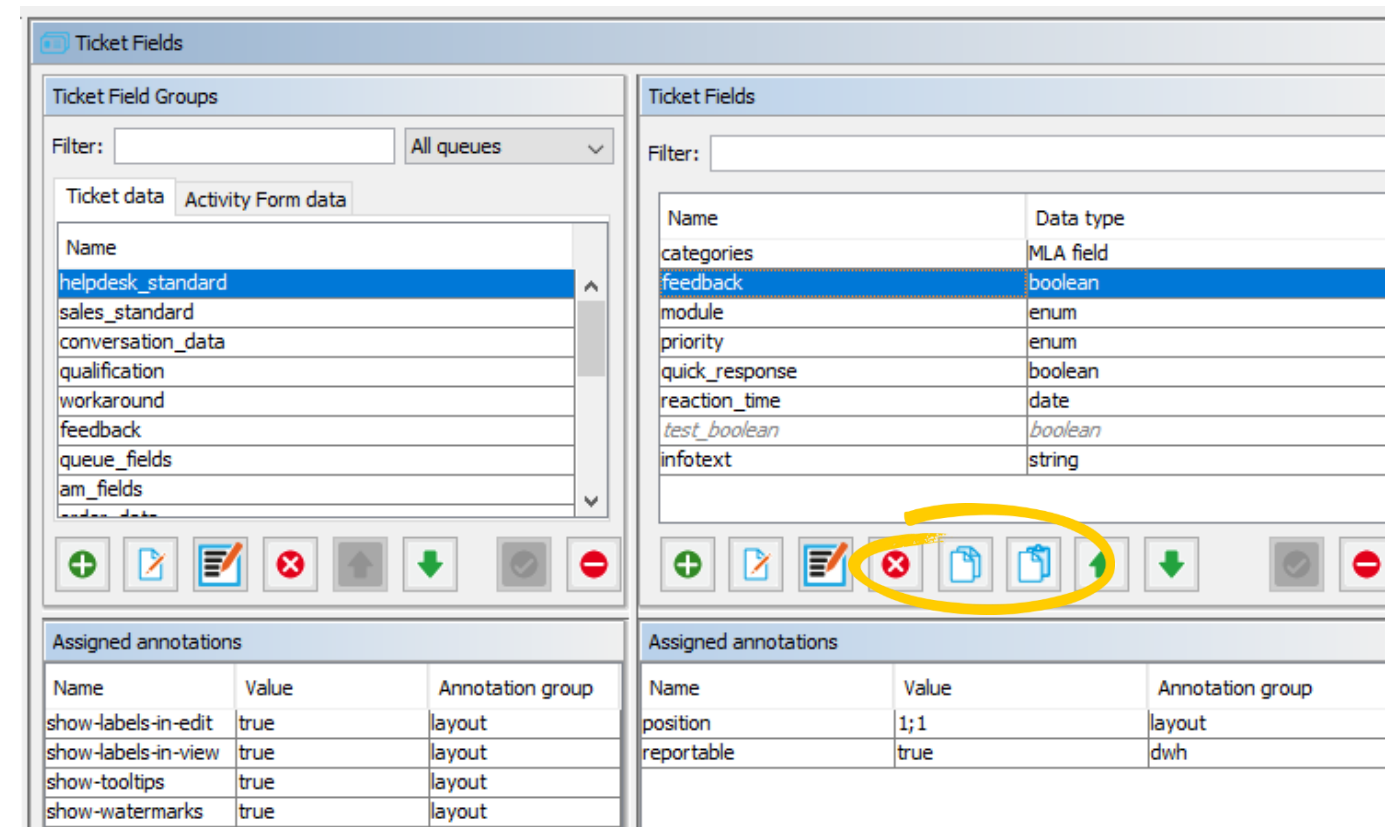
Gain a quick and detailed overview of the DWH-related processes.  
No need to look into the database or into log files for such everyday operations



You are an administrator and you were waiting for this feature? It's there now!

Data Fields can be copied/pasted in the Admin Tool

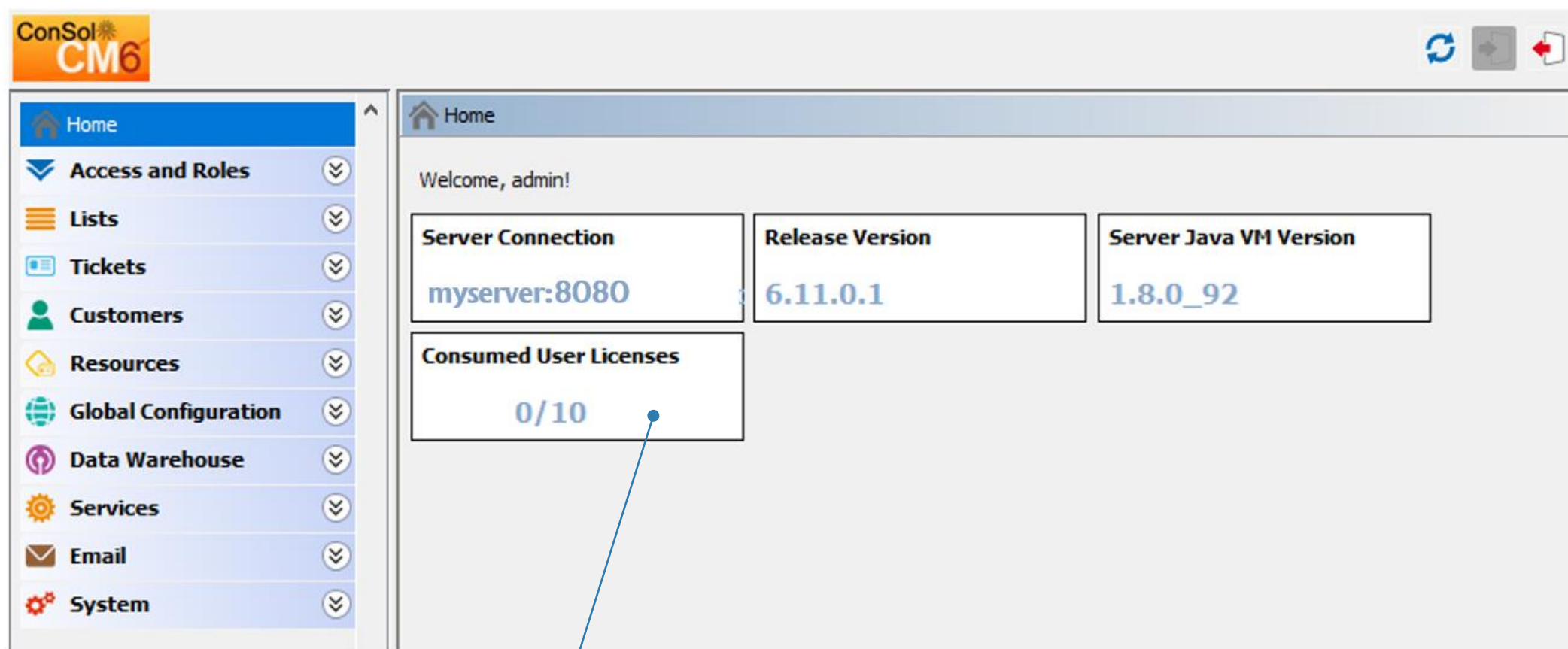
- Works for
  - Ticket Fields
  - Customer Fields
  - Resource Fields



Implement changes and improvements in  
your ConSol CM configuration quickly



You have to keep an eye on the consumed licenses? - Use the server information on Home tab of the Admin Tool



*Gain a quick overview of the basic server info of your ConSol CM system*

*Use engineer licenses in Web Client  
or use customer licenses in the  
portal CM/Track*





We streamlined the ConSol CM terminology! Be one of the first to see our new names for data fields in ConSol CM

Current term	Definition	Old terms
ticket field Ticketfeld	Data field for tickets	Custom Field (up to 6.10) Benutzerdefiniertes Feld (bis 6.10)
ticket field group Ticketfeldgruppe	Group of data fields for tickets	Custom Field Group (up to 6.10) Benutzerdefinierte Feldgruppe (bis 6.10)
customer field Kundenfeld	Data field for customers	Data Object Group Field (up to 6.10) Datenobjektgruppenfeld (bis 6.10)
customer field group Kundenfeldgruppe	Group of data fields for customers	Data Object Group (up to 6.10) Datenobjektgruppe (bis 6.10)
resource field Ressourcenfeld	Data field for resources	n/a
resource field group Ressourcenfeldgruppe	Group of data fields for resources	n/a
resource category Ressourcenkategorie	Upper level in the resource grouping	resource group (up to 6.10) Ressourcengruppe (bis 6.10)
resource type Ressourcentyp	Lower level in the resource grouping	n/a

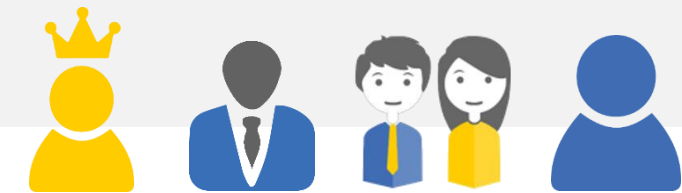
*The new terminology is strongly linked to the terms of the basic ConSol CM objects.*

*This makes communication about and documentation of ConSol CM topics much easier.*



# CM 6.11.0 | Performance Improvements

Release Notes 6.11.0,  
sections 1.3.2 and 2.3.2



Speed up your entire business process!

The overall performance of ConSol CM has been increased tremendously

For example:

- quicker loading of the ticket
- quicker workflow operations
- quicker CM/Track (portal) operations
- quicker import/export operations
- quicker Admin Tool operations



# CM 6.11.0 | Technical Update Information



The **Update from ConSol CM 6.10 or lower to 6.11** is rather complex, because the database structure has been optimized tremendously.

Please contact your ConSol CM consultant or ConSol CM project manager when you start planning the system update. They will be happy to help you.



Please note that the update might take some time due to the database re-organization. You might want to use the pre-migration routine available for ConSol CM 6.10.5.3. Please ask your ConSol CM consultant for help.

# CM 6.11.0 | General Information

In this **New Features presentation** you have seen the most interesting and most prominent features of the new ConSol CM version.

For technical details please refer to

- the **Technical Release Notes**
- the **ConSol CM Manuals**, especially the Administrator Manual  
All manuals are available for download on the ConSol ftp server <ftp.consol.de> (please ask your ConSol CM consultant or our support team for a login).
- the **System Requirements**



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