



ConSol Software GmbH

# ConSol CM User Manual

Version 6.12.1.3

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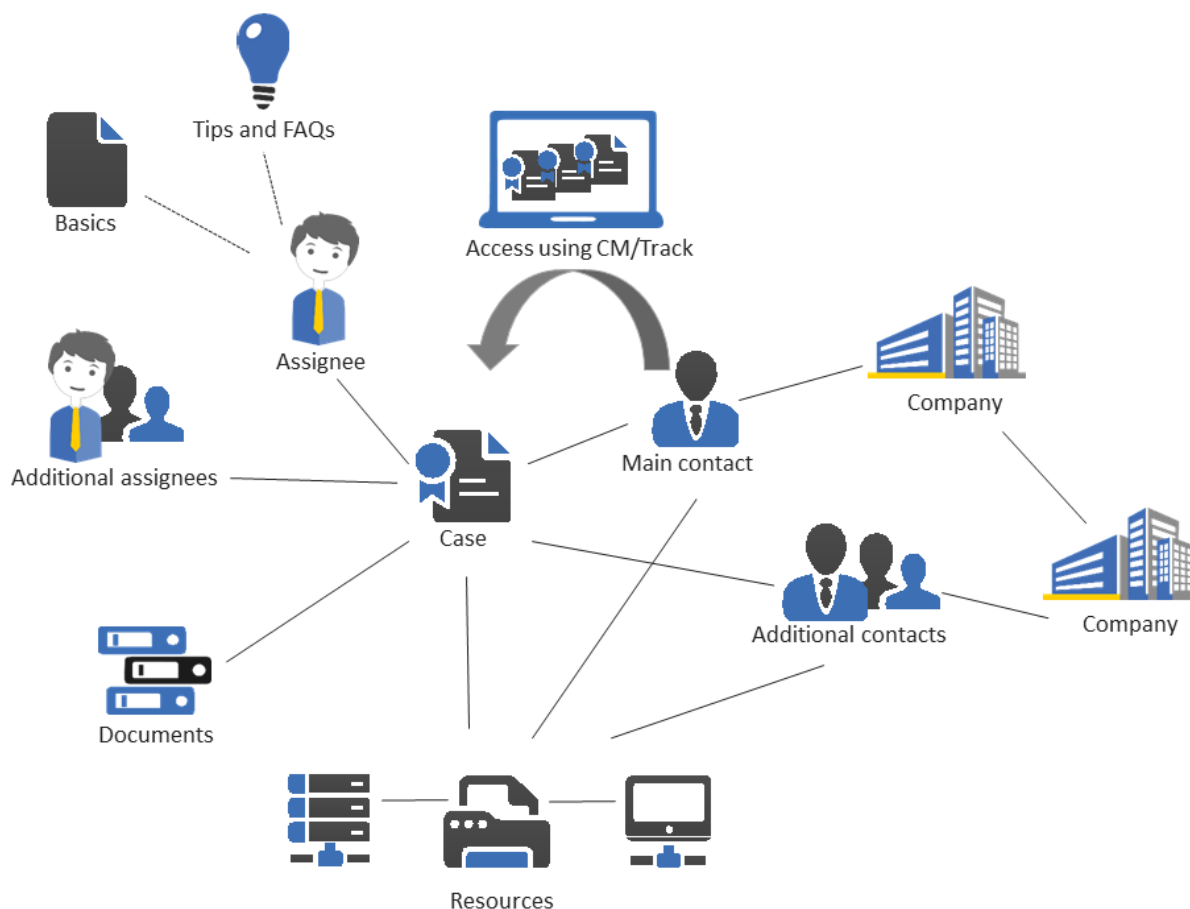
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## A - Introduction



This section provides general information about the content and structure of this manual as well as an introduction to ConSol CM.

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## A.1 ConSol CM for business process management

ConSol CM is a process management platform, especially suited for use as customer service software.

Using ConSol CM you can control and steer business processes with a strong focus on human communication and interaction as required in all fields of customer service management. Well-known examples of huge ConSol CM systems comprise customer service desks, RMA processes, after sales services, call centers and support centers as well as claim and complaint management environments. You can also set up customer portals, including FAQ areas, using ConSol CM. Basically, every business process that is in operation in a company can be modeled and brought to life with ConSol CM.

ConSol CM also provides the functionality to cover adaptive case management. In this way, you can decide, if you would like to design and live a strictly controlled business process or if a rather high level of flexibility is required. You might also combine both concepts, depending on the team or department who work with the process.

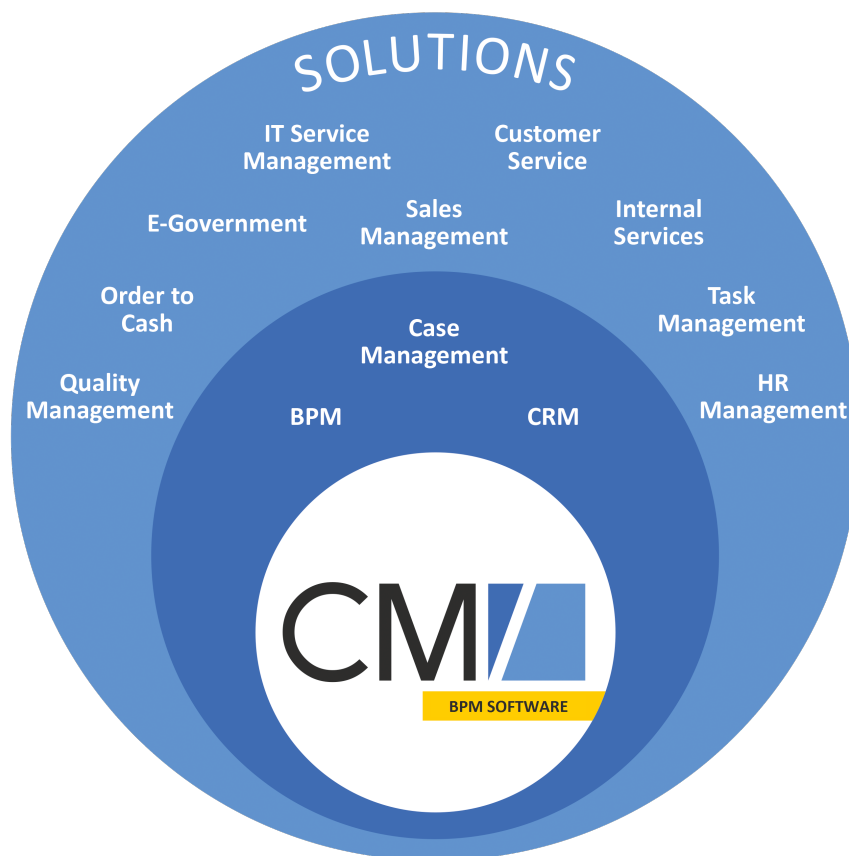


Figure 1: Overview of potential fields of use of the BPM software ConSol CM

Using ConSol CM, you can handle all components which are relevant in business processes to represent and control your company's processes in an optimal way. ConSol CM is used in various different industries and branches ranging from insurances and banks over fashion designing companies to producers of ticket vending machines or car washes. The flexible process designing mechanism and workflow engine provide a perfect basis for the modeling and controlling of business processes, especially customer service processes, of different kinds.

## A.2 List of manuals

ConSol CM provides documentation for several groups of users. The following documents are available:

- **Administrator Manual**  
A detailed manual for CM administrators about the ConSol CM configuration using the Admin Tool.
- **DWH Manual**  
A detailed explanation of the ConSol CM data warehouse (DWH) concept, the database schema and a list of all table structures.
- **Operations Manual**  
A description of the ConSol CM infrastructure, the server integration into IT environments and the operation of the CM system, for IT administrators and operators.
- **Process Designer Manual**  
A guideline for workflow developers about the graphical user interface of the Process Designer and how to program workflow scripts.
- **Setup Manual**  
A technical description for ConSol CM setup in different IT environments. For expert CM administrators.
- **System Requirements**  
List of all requirements that have to be met to install ConSol CM, for IT administrators and CM administrators. Published for each ConSol CM version.
- **Technical Release Notes**  
Technical information about the new ConSol CM features. For CM administrators and key users. Published for each ConSol CM version.
- **User Manual**  
An introduction to the ConSol CM Web Client for end users.

## A.3 TecDoc server

For detailed information about all aspects of ConSol CM, please see also our **tecdoc server**, available at <https://tecdoc.consol.de>. You find there:

- All **ConSol CM manuals**  
The ConSol CM manuals for several target groups in English and in German
- The **release notes** for each ConSol CM version  
Detailed Release Notes documents which explain every new feature of every ConSol CM version
- The **system requirements**  
An overview of the required hardware, middleware, and software prerequisites which are required to install ConSol CM
- The **feature presentations**  
Not too technical presentations which provide an overview of the features of new ConSol CM versions


## A.4 Content of this manual


The book contains the following sections:


- [Basics](#)  
Here you can find an explanation of the most important terms, principles and basic features of ConSol CM. Read this section to get started working with the Web Client.
- [Cases](#)  
Here you can find everything you need to know for working with cases.
- [Contacts](#)  
Here you can find everything you need to know for working with contacts.
- [Optional ConSol CM add-ons](#)  
Here you can find everything you need to know for working with CM/Resource Pool, CM/Track and CM/Archive, optional modules of ConSol CM.
- [Tips, troubleshooting, and FAQs](#)  
Here you can find tips and answers to common questions.
- [Appendix](#)  
Here you can find a glossary and the trademarks section.


## A.5 Layout explanations

The following icons and colors are used to emphasize and highlight information:

 This is an additional information.

 This is an important note. Be careful here!

 This is a warning!

 This is a recommendation from our in-the-field consultants.

## A.6 Legal notice

Since we would like to provide a manual for you which helps you manage your CM system, but which also provides additional information about connected topics, we have inserted external links into the manual. In this way, you can get some background information about a topic if you like. This can help you better understand the required CM configuration. Despite careful review, we assume no liability for the content of those external links. The operators of sites linked to are exclusively responsible for their content.

## A.7 Gender disclaimer

As far as possible, ConSol CM manuals are written gender-neutral and often address the user with "you". When the phrasing "The user .... he ..." is used, this is always to be considered to refer to both, the feminine as well as the masculine form.

## A.8 Copyright

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## A.9 System components of ConSol CM

ConSol CM comprises different client applications. Depending on your roles and tasks in your company you will use one or more of those applications.

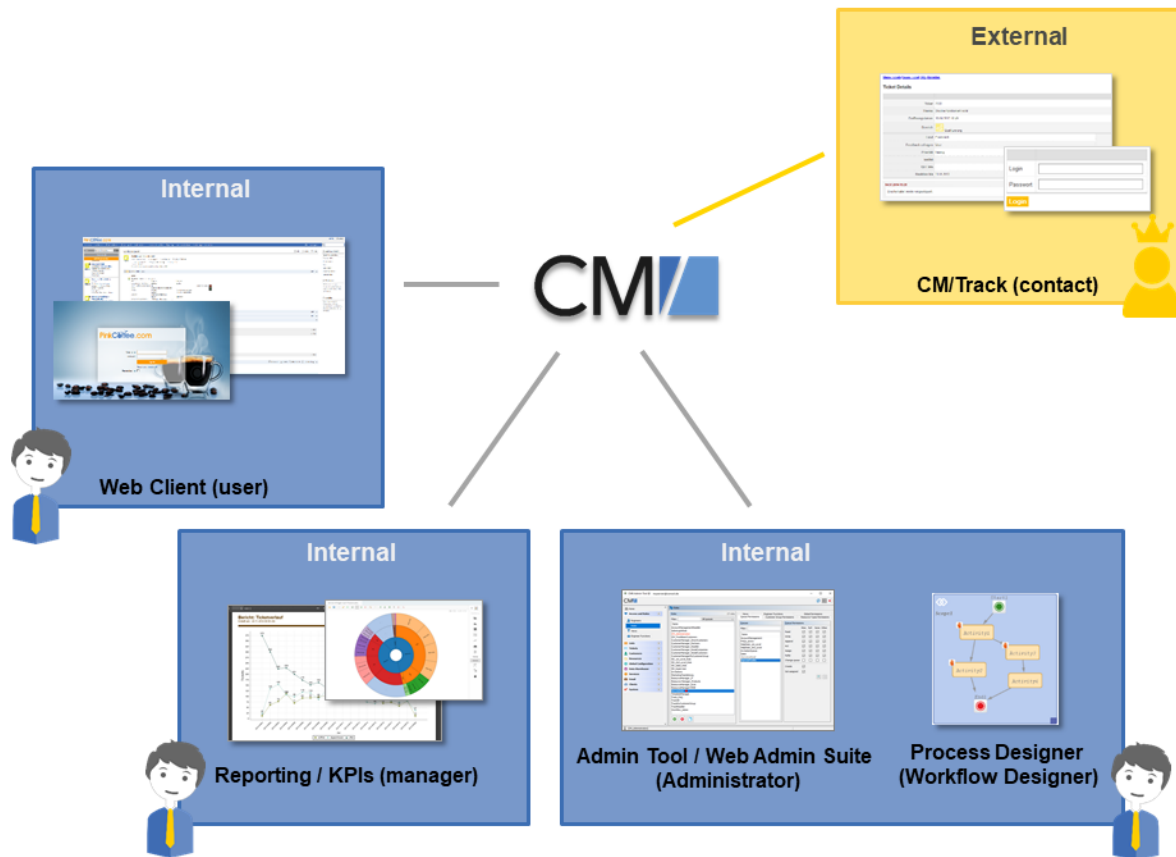


Figure 2: ConSol CM system components

- Web Client**  
 The primary access point to the system for standard users. Users work with cases, contacts and resources.
- Portal**  
 CM/Track, the primary access to the system for (internal or external) contacts. CM/Track is a distinct CM module which requires a separate license. With this module, you can offer portal access to the cases to your contacts. Moreover, your FAQs can be made available via the web.
- Admin Tool**  
 For all system configuration tasks. As an administrator, you will primarily work with this tool. This tool is used to define the system setup. All settings (apart from workflows) are configured using the Admin Tool, and access to it is restricted to admin users.
- Process Designer**  
 For the workflow design and implementation. As a workflow developer you will primarily work with the Process Designer. In this tool, all workflows are designed graphically as well as in Groovy code.

The default scope of delivery also includes a data warehouse (DWH) that allows reporting about the data of your cases.

Furthermore, ConSol CM is not an isolated application but can be easily integrated into your company's IT infrastructure, e.g. using Web Services and/or an Enterprise Service Bus (ESB) or the ConSol CM Webhook interface.





## A.10 Technical principles of ConSol CM

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### A.10.1 Introduction

As a user, you only work with the Web Client. You do not have to know too much about the other components of ConSol CM.

However, knowing some basic facts about your new BPM software will help you gain a good understanding of the system to enable efficient work. Thus, the following sections provide an overview of the main CM components.

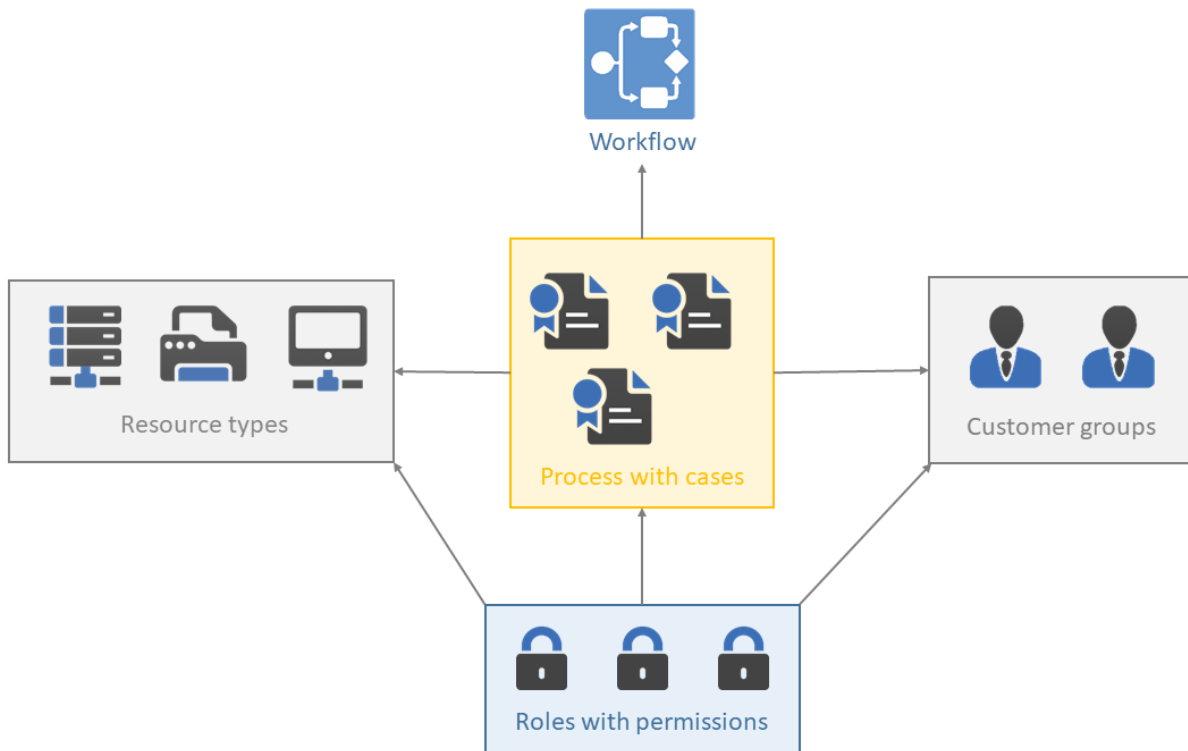


Figure 3: ConSol CM - Basic principles (with CM/Resource Pool)

In ConSol CM, the following rule applies regarding tickets:




**External** side: A case always has a **main contact**. This can be a person or a company.

**Internal** side: A case can have no or one **assignee** who works on the case.

### A.10.2 Users

The users represent the **internal** side of the CM system. The engineers work on the cases to carry out the tasks defined in the business process. Every case can only be assigned to one user, who is currently responsible for the case. But a case may have any number of **additional assignees**, who all have a **function** representing a specific task within the process.


All users have a user account consisting of a user name and password, which they use to log in to the Web Client. The users' access permissions are managed using roles. The roles, which contain access permissions for processes, contacts, and resources, are defined in the Admin Tool and assigned to the users.


 It depends on the configuration of your ConSol CM system if a user is called *assignee* in your system. Users might be called *agents*, *employees*, or similar in your Web Client. In this manual, the terms *user* and *assignee* are used for your convenience.

### A.10.3 Contacts

The contacts represent the **external** side of the CM system. The term *contact* has a broader meaning in ConSol CM than in everyday speech. It refers to the person or object that is the **reason for opening the case**. This can be a person or a company, but also a machine, a product, or another entity. The contacts can be internal, i.e., belong to the same company as the users. A case is always assigned to **one main contact**. It can, but does not have to, have **any number of additional contacts**.

Every contact belongs to one **customer group**, which is associated with a contact data model.

 Each CM system uses customized customer groups and data models. Therefore, the available customer groups, hierarchical levels for contact objects, data fields, relations, and activities depend on the individual configuration of your CM system.


 It depends on the configuration of your ConSol CM system how contacts are called in your system. Contacts might be called *customers* or similar in your Web Client. In this manual, the terms *contact*, *company* and *person* are used for your convenience.

### A.10.4 Cases

The case is the request of the contact which the users work on. This can be an incident, a service case, or any other request. For each request, a case is created. The users work on the case, which means that they carry out the necessary steps as defined in the business process. The progress, including internal and external communication, is documented in the case. The business process can involve several users and different teams. When the request is solved, the case is closed. Closed cases are not lost, but they represent a powerful archive and knowledge base.

In ConSol CM there are the following rules for cases:

- A case must have one main contact. Every case can have only one main contact. It does not need to have additional contacts, but it can have any number of additional contacts. The contact represents the **external** side of a case.
- A case does not have to be assigned to a user, but if it is, it can only be assigned to one user at a time. A case does not need to have additional assignees, but it can have any number of additional assignees. Assigning a case to a user can be done manually or automatically. The users represent the **internal** side of a case.
- A case always has a name, often called *case number*, a subject, and a case icon. The case icon shows the current scope of the case and can have a color indicating the value of a given data field.
- The case header always shows the current process and scope, assignee, and creation date of the case.
- The case icon in the Web Client can have (and in most cases does have) a color that represents a certain value of a list. Often the priority is used, e.g., high priority cases are displayed in red, medium cases in orange, and low priority cases in yellow.

 It depends on the configuration of your ConSol CM system how cases are called in your system. Cases might be called *ticket*, *case*, *call*, *task*, or similar in your Web Client. Each process can have its own term to refer to cases. In this manual, the term cases is used for your convenience.

Each CM system uses customized case data. Therefore, the available fields, relations, and activities depend on the individual configuration of your CM system.

## A.10.5 Resources

Resources can be used to manage objects which are related to the business process. Possible use cases are IT assets, SLAs, products or newsletters. All resources are saved in **CM/Resource Pool**, a separate CM module. The administrator defines the resource model, i.e., the resource types, resource data fields, the hierarchy of the resources, and the possible relations to cases, contacts, and other resources. Please see [Basic knowledge about resources](#) for a detailed explanation of the concepts and the structure of a resource page.

A user with the required permissions can create resources and link them to existing cases, contacts, and other resources. For example, you can link a computer to an incident case concerning this computer or to the contact who uses it.


## A.10.6 Processes

The process is the **core component** of ConSol CM administration. It contains thematically related cases which should be handled in the same way and follow the same business process. Every process has exactly one **workflow**, which implements the desired course of action. The required case data fields are assigned to the process. In addition, the access permissions, which are granted to the users via roles, are based on processes.

Therefore, the process determines:

- how the cases should look like (case data fields)
- whose cases are processed (customer groups)
- how its cases are processed (workflow)
- who can work on the cases (permissions)

Processes often reflect the organizational structure of the company. For example, there can be one process for each department, as each department has its own way of working. A case can be passed from one process to another. In this case it adapts to the new process, i.e., it receives the data fields of the new process and only users with permissions for the new process can work on it.

 It depends on the configuration of your ConSol CM system how processes are called in your system. Processes might be called *queues*, *teams*, or similar in your Web Client. In this manual, the term *process* is used for your convenience.

## A.10.7 Workflows

A workflow is designed and created by a CM workflow developer using the ConSol CM Process Designer. It implements the business process which is executed in the Web Client. The workflow consists of several steps, which are called *activities*. There are manual activities, which are performed by the users, and automatic activities, which are performed by the system. The activities are arranged in

**scopes** to illustrate the status of a case. The intelligence of the process, like conditions, decisions, escalations, reminders, automatically sent emails, or other actions, is also defined in the workflow. You can implement process chains or a hierarchical process structure by linking several workflows.

As a user, you will not work with the workflow itself, but you will see the current process and scope of the case. The scope is indicated by the symbol of the case icon and scope name in the basic case data. Furthermore, you see the workflow activities which are available for the case at its current position. In this way, you always have a good overview of the current status of the case.

### A.10.8 Accessing objects in ConSol CM

In ConSol CM, the different objects (cases, contacts and resources) form a network. The objects are connected, e.g. a case is always linked to one or more contacts. The connections which exist between the current object and other objects in ConSol CM are displayed on the object's page, where you can directly access the linked objects.

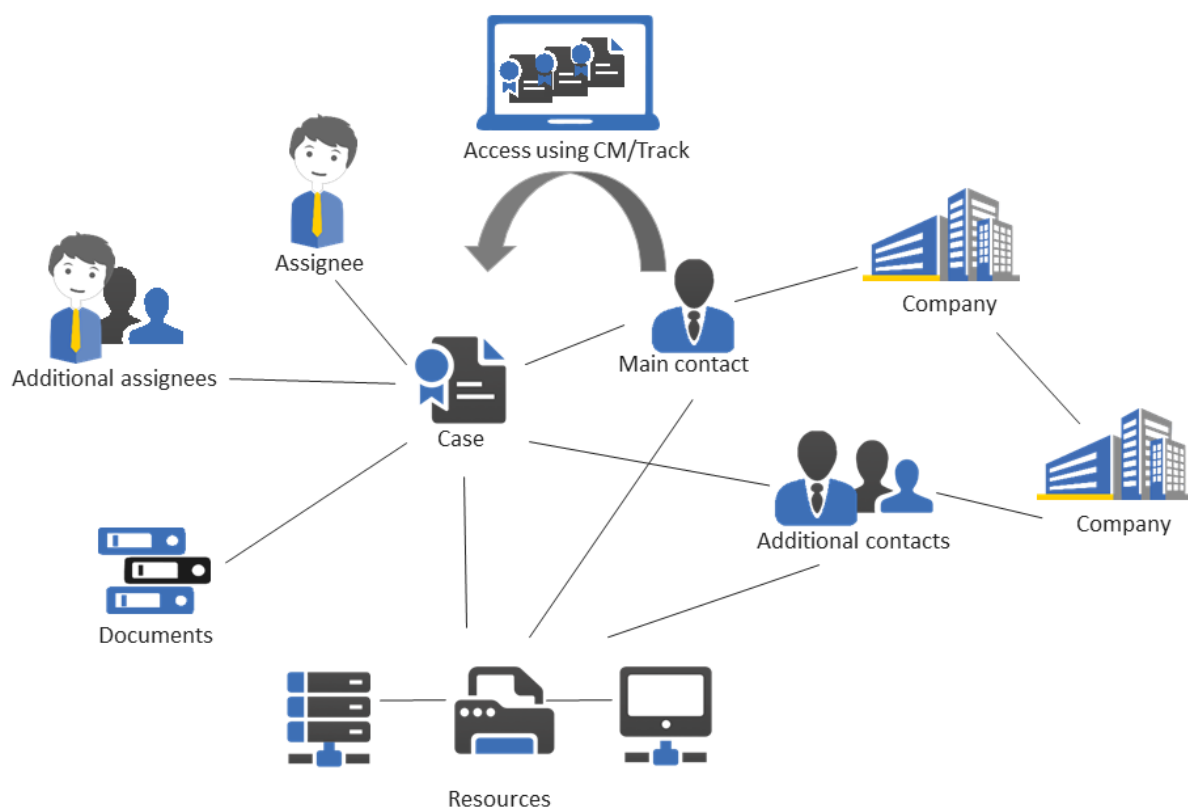
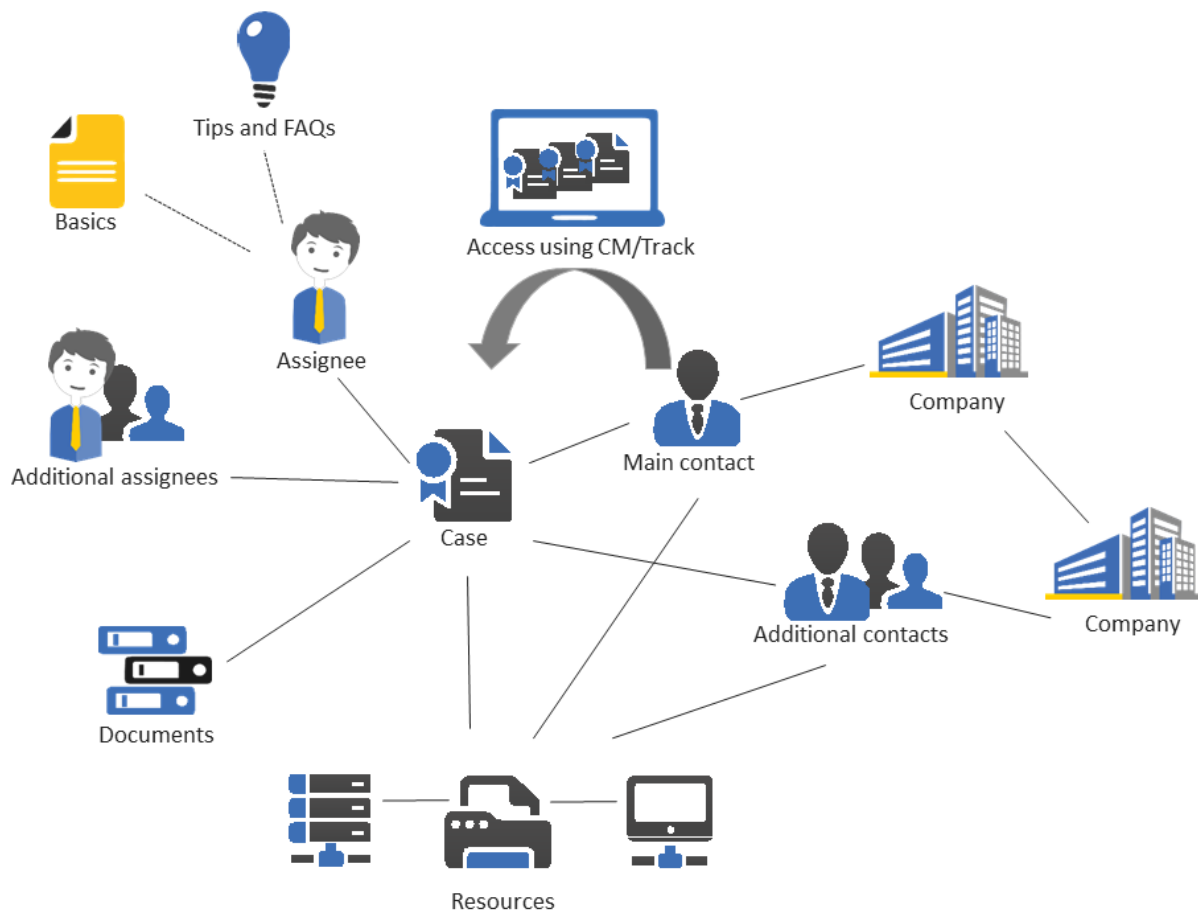


Figure 4: *Network of ConSol CM objects*

Since the ConSol CM Web Client always provides menus or links to open the objects which are related to another object, the users can move within the network easily, thus working efficiently with contact, case, and resource data. Once you have opened an object (e.g. a case), you can move from one related object (e.g. the main contact of the case) to other related objects (e.g. the company of the main contact or a resource which is related to the case or the contact). No further search is required.

All components for a certain case or service request can be accessed easily. If contact-contact relations are managed using CM, the CRM (customer relationship management) component is even stronger.

## B - Basics



This section provides information about the general features of ConSol CM:

### Using the Web Client

- [Login and logout](#)
- [User interface](#)
- [Main features](#)
- [Data fields](#)
- [Relation graphs](#)

### Using the search functionalities

- [Quick Search](#)
- [Detailed Search](#)
- [Autocomplete Search](#)

### Communicating with other users

- [Notifications](#)

### Using activities

- [Activities](#)

### Understanding permissions and the availability of objects

- [Permissions](#)

### **Managing your user profile**

- [User profile](#)



## B.1 Login and logout

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## B.1.1 Terms and concepts


### B.1.1.1 User account

To log in to the Web Client you need a user account. It includes a **user name** and a **password**. You receive your user name and password from your CM administrator. If you log in to the Web Client for the first time, you should [change the password](#) that was given to you to a password that you created yourself.

**Exception:** If you are logged in automatically via Single Sign-On or log in using LDAP, you cannot change your password in the Web Client.

### B.1.1.2 Session

The time period between your Web Client login and logout is called a *session*. A *session timeout* occurs when you stay inactive for a certain period of time, whose length is configured by your administrator. You will be logged out automatically and your Workspace will be deleted.

 Depending on the system configuration, a warning message might be displayed before you are logged out due to a session timeout. In this case, you can click *Yes, extend my session* to avoid being logged out.

If you want to be re-logged in automatically after a session timeout, you have to select the *Remember me* checkbox. In this case you do not have to enter your user name and password again after an automatic logout until you manually log out using the *Logout* button in the Web Client. An automatic logout happens due to a session timeout, after you closed your browser, or when you restart your computer.

Since the automatic re-login is controlled via cookie, it only works

- on the computer you used for your initial login to the Web Client.
- with the browser you used for your initial login to the Web Client.
- as long as you do not delete the cookies for this browser.
- until you [manually log out via the Logout button](#) (this deletes the *Remember me* cookie).


Please bear in mind that although you are automatically logged in again, your [Workspace](#) will still be empty, as it is deleted when a session timeout occurs.

If you log in in two different browsers at once, two sessions are opened and you use two licenses. In this case, a message is displayed in the Web Client. You can close the other sessions by clicking the button *End my other sessions* in the message. Alternatively, you can close your other open sessions in the user profile, see [Active sessions](#).

### B.1.1.3 Login methods

Depending on the individual configuration of your Web Client, you can use one of the following login methods:


- Login with your **user name** and **password**, see [Logging in with user name and password](#)
- Login with **LDAP**, see [Logging in using LDAP](#)
- Login with **SSO**, see [Logging in using Single Sign-On](#)


 Your CM administrator can tell you which login method to use.

## B.1.2 Logging in with user name and password

Please proceed as follows to log in to the Web Client using your user name and password:


1. Enter the URL of the Web Client into your browser. If you do not know the URL, please ask your CM administrator.
2. Enter your user name and password.
3. Optional: Select the *Remember me* checkbox if you want to be logged in automatically after a session timeout.
4. Click the *Sign in* button.

 The password is case-sensitive, so please make sure you enter upper and lower case letters correctly.

 If you forgot your password, you can [reset](#) it using the *Forgot your password?* link.


## B.1.3 Logging in using LDAP

The login via LDAP is performed the same way as the [login with user name and password](#). The only difference is that in this case the password is stored in an external directory and the Web Client accesses this directory. This enables you to use the same user name and password for the Web Client as you use for, e.g., the company's intranet. Since the password is stored in an external directory, you cannot change it on your user profile page in the Web Client.

 Login via LDAP requires a special configuration and the interaction of multiple IT systems. Therefore, LDAP login is only possible when your system was explicitly configured to support this option.

## B.1.4 Logging in using Single Sign-On

To log in to the Web Client using Single Sign-On, enter the URL of the Web Client into your browser. You will be logged in automatically using your Windows user account. Please refer to section [Troubleshooting](#), if you want to log in with a different user name than the automatically used one.

 Single Sign-On uses your Windows user account data to log you in to the Web Client. This requires a special configuration and the interaction of multiple IT systems. Therefore, Single Sign-On is only possible if your system was explicitly configured to support this option.

## B.1.5 Logging out

You should log out when you stop using the Web Client. This is because you block one of the available concurrent licenses while you are logged in. To do so, click the *Logout* button located above the main menu, next to your name. Please bear in mind that your [Workspace](#) is deleted when you log out of the Web Client. You are logged out automatically when a [session timeout](#) occurs.

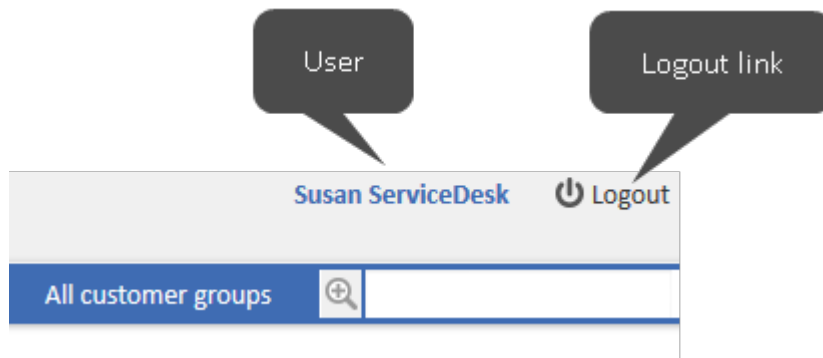


Figure 5: *Logout link*

Depending on the configuration of your CM system, a logout page might be displayed after logging out. Otherwise, you are forwarded to the login page.

## B.2 User interface

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## B.2.1 Customization

Your company can adapt ConSol CM to its individual requirements. This process is usually called customization and it affects the user interface of the Web Client, the data models for cases, contacts and resources, and the workflows and activities.

The following aspects of the user interface can be customized:

- **Layout**  
Colors, fonts and images
- **Menus**  
The main menu, the links, and the context menus (available by clicking on the small grey triangle). The entries might appear or not and the names can differ.
- **Dashboard**  
Content and layout of the dashboard
- **Main working area**  
Structure of cases, contact pages, and resource pages
- **Labels**  
Naming of objects in the Web Client
- **Icons**  
Case, contact, and resource icons
- **Activities**  
The workflow activities for cases, the contact activities for persons and companies, and the resource activities

## B.2.2 Layout of the Web Client

The layout of the ConSol CM Web Client depends on the **skinning**, i.e., the graphical design which has been developed for your specific CM system. The skinning usually includes colors, fonts, and images matching the corporate design of your company.

Here are two examples of the overall layout. The first one is the standard layout. You will see this layout if your company does not use a customized layout for the Web Client. The second example is from an installation of PinkCoffee, a fictional company used in demo environments.

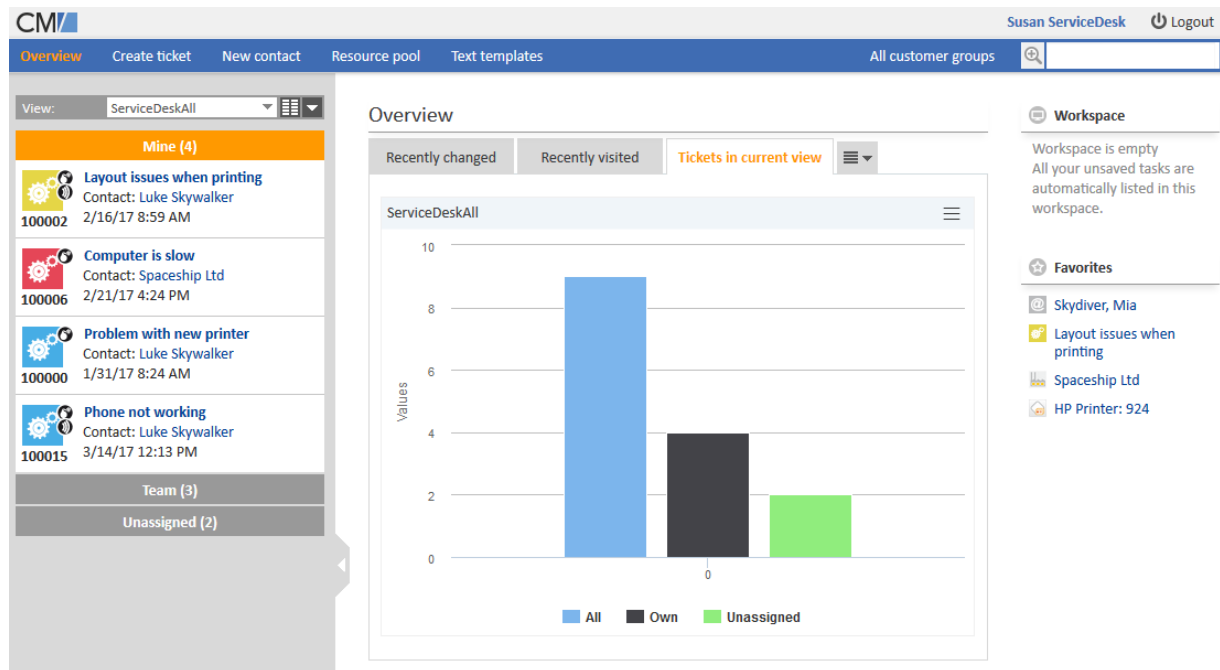


Figure 6: Standard layout

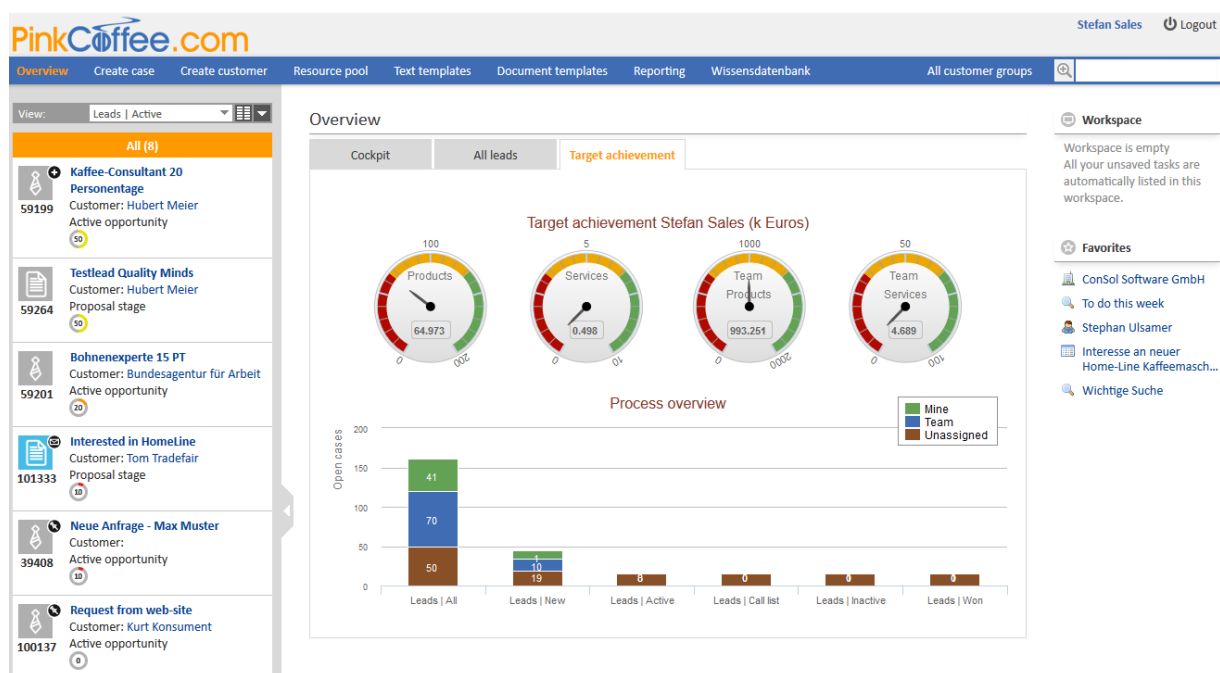


Figure 7: Layout of PinkCoffee

As you see in the above screenshots, PinkCoffee uses an installation where several aspects are customized:

- The PinkCoffee **logo** is shown in the upper left corner of the screen.
- The **dashboard** features a customized graphic.
- The additional **links** *Reporting* and *FAQ* were added to the main menu.
- The Web Client uses a different **wording** as cases are called *cases*.



The screenshots in this manual were taken from an installation with the standard layout. You might find a completely different layout in your Web Client, depending on your company's corporate design.

## B.2.3 Main features

This chapter discusses the following:

- [Areas and functions](#)
- [Main menu](#)
- [Overview page](#)
- [Customer group filter](#)

### B.2.3.1 Areas and functions

You will find the following areas and functions on the standard user interface of the ConSol CM Web Client:

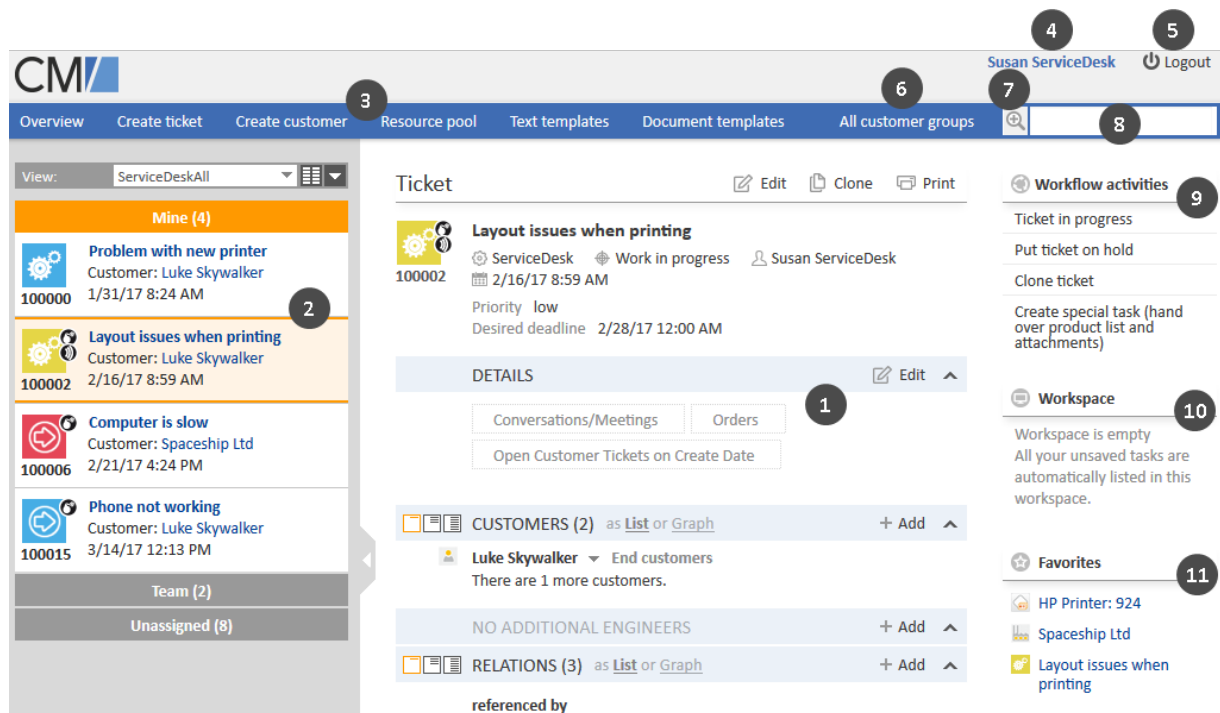


Figure 8: The user interface of the ConSol CM Web Client

- **Main working area (1)**

The main working area displays the item which you are currently working on. This can be a case, a contact page, a resource page, a search results page, or a dashboard. The above example shows a case in the main working area.

- **Case list (2)**

The case list provides you with a quick and convenient way to find cases ("to do list"). You can select a view above the case list.

Please see [Case list](#) for further information.

- **Main menu (3)**

The main menu contains links to the different Web Client screens. Depending on the individual configuration of your CM system and your roles, you can see different menu items.

Please see [Main menu](#) for further information.



- **Link to the user profile (4)**

The link to the user profile shows the name of the currently logged in user (here: *Susan ServiceDesk*). Click the name to open the user profile page, where you can adjust personal settings and set up representations.

Please see [User profile](#) for further information.

- **Logout button (5)**

Click the *Logout* button to log out of the Web Client.

Please see [Login and logout](#) for further information about logging in to Web Client and logging out of the Web Client.

- **Customer group filter (6)**

The customer group filter allows you to limit your work to a specific customer group, so you see only the contacts who belong to this customer group.

Please see [Customer group filter](#) for further information about this item.

- **Link to the Detailed Search (magnifying glass) (7)**

Click the magnifying glass to open the Detailed Search page, where you can search for cases, contacts, and resources using multiple search criteria.

Please see [Detailed Search](#) for further information about the Detailed Search.

- **Quick Search (8)**

The Quick Search allows you to search for cases, contacts, and resources without leaving the page you are currently working on.

Please see [Quick Search](#) for further information about the Quick Search.

- **Activities (9)**

This section shows the available activities/actions for the item displayed in the main working area. These can be workflow activities for cases, contact activities for contacts, resource activities for resources, or search activities for Detailed Searches.

Please see [Activities](#) for further information.

- **Workspace (10)**

The Workspace allows you to access temporarily saved data. If you create or edit case, contact, or resource data, and switch to another screen without saving, your latest draft is saved in the workspace. You can retrieve it later to continue working.

Please see [Using the workspace](#) for further information.

- **Favorites (11)**

Favorites allow you to quickly access frequently used items. You can drag-and-drop cases, contacts, resources, or searches to the favorites, and open them with a single click afterwards.

Please see [Using the favorites](#) for further information.

### B.2.3.2 Main menu

The main menu is displayed in the upper part of the screen, above the main working area.



The available menu items and their names depend on the individual configuration of your CM system.

The following items can be available:

- **Overview**

This menu item provides access to the dashboard. Please see [Overview page](#) for further information.

- **Create case**

This menu item provides access to the *Create case* page, where you can create a new case. This menu item is displayed if you have permissions to create cases in at least one process. Please see [Creating a case](#) for further information.

- **Create contact**

This menu item provides access to the *Create contact* page, where you can create a new company or person. This menu item is displayed if you have permissions to create contacts for at least one customer group. Please see [Creating a contact](#) for further information.

- **Resources**

This menu item provides access to CM/Resource Pool. This menu item is displayed if CM/Resource Pool is active in your system and you have permissions to access resources. Please see [Basic knowledge about resources](#) for further information.

- **Additional links** (here: *Reporting*)

Your CM administrator can add additional links to the main menu. These are external links which depend on the individual configuration of your CM system.

### B.2.3.3 Overview page

After logging in to the Web Client, you see the *Overview* page. It usually contains a **dashboard** showing a summary of the current cases. The dashboard consists of different widgets, which can be grouped in one or more tabs. The actual content and layout of the dashboard depend on the individual configuration of your CM system.

There are six types of standard widgets:

- Charts, e.g., column charts, pie charts, or funnel charts. A chart might contain interactive elements as shown in the following figure.
- Tables
- KPIs
- Recently visited: shows a list of items which the current user has recently visited
- Recent changes: shows a list of items which have been changed recently
- Calendar
- News

The following example shows a dashboard consisting of one chart widget which displays a summary of the cases in the currently selected view. You can print the widget using the print button in the upper right corner of the widget. Hover over a column to display details about this column. You can hide columns by clicking the column name in the legend. To display it again, click the column name, which is grayed out.

Depending on the configuration of your CM system, other functionalities and types of widgets might be available.

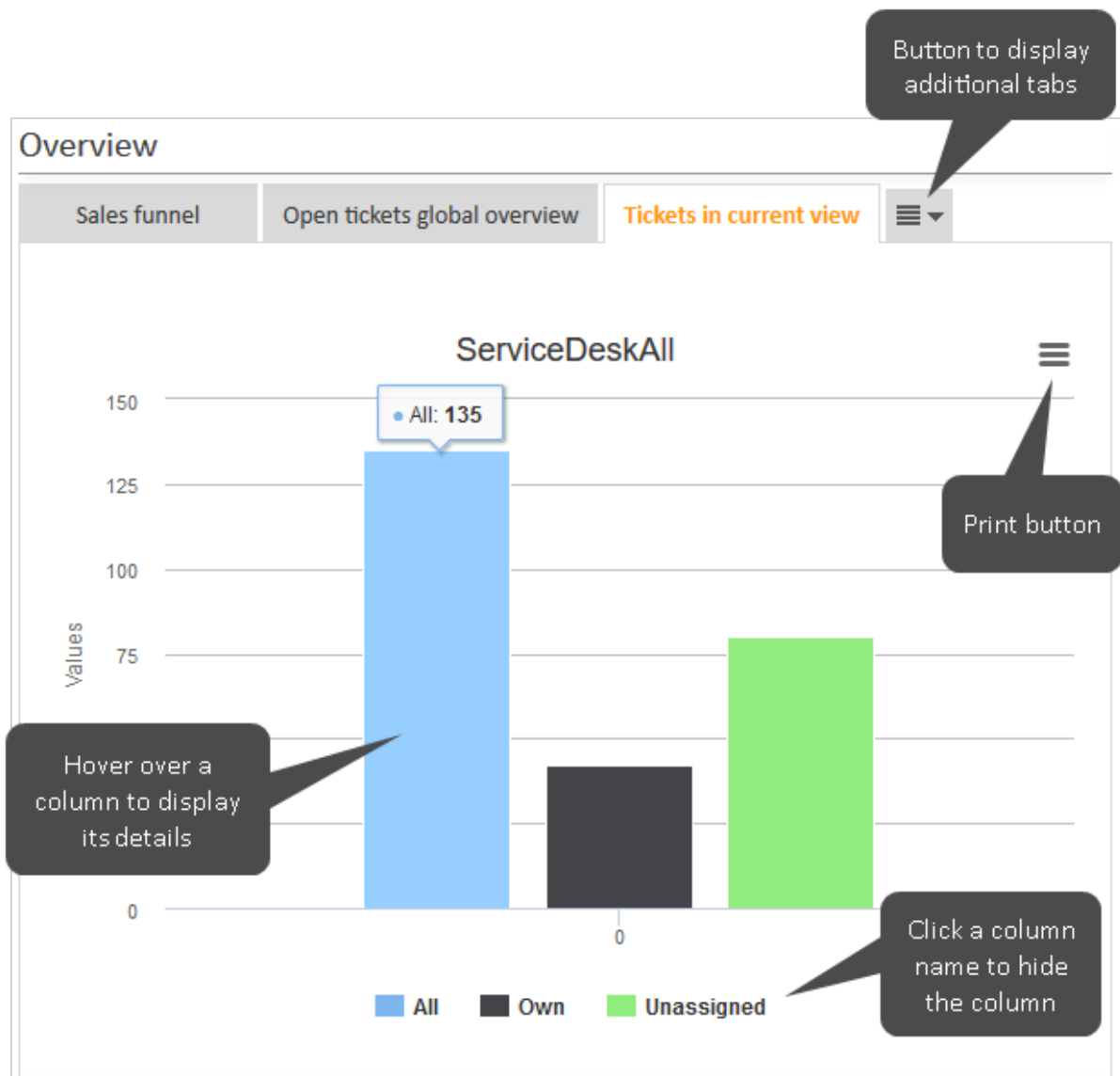


Figure 9: Example of a dashboard on the Overview screen

The following example shows a news widget. Your CM system can provide news from different sources. Click the header of a news entry to display the news text.

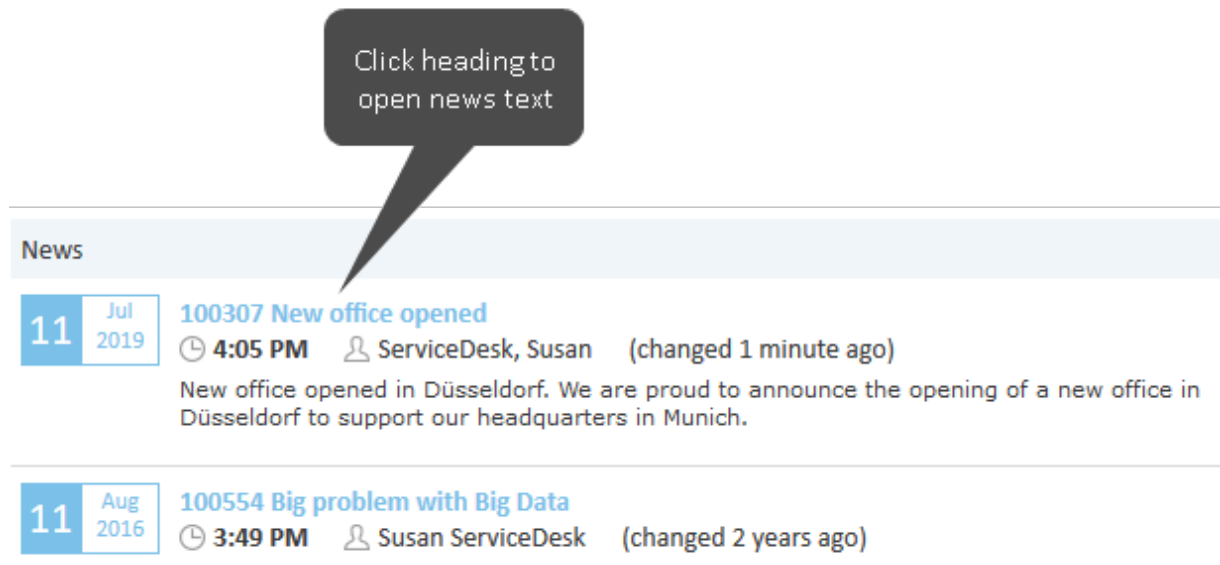


Figure 10: Example of a news widget

The following example shows a *Recent changes* widget. The list can be filtered using the tool icon in the widget header. Click *All actions* to display all kind of changes, or *User actions only* to display only changes made by a user. You can click a link to open the page of the respective item. Click the *show all* link to open a pop-up window listing more items. The widget lists only changes to objects which the current user is allowed to see due to his permissions.

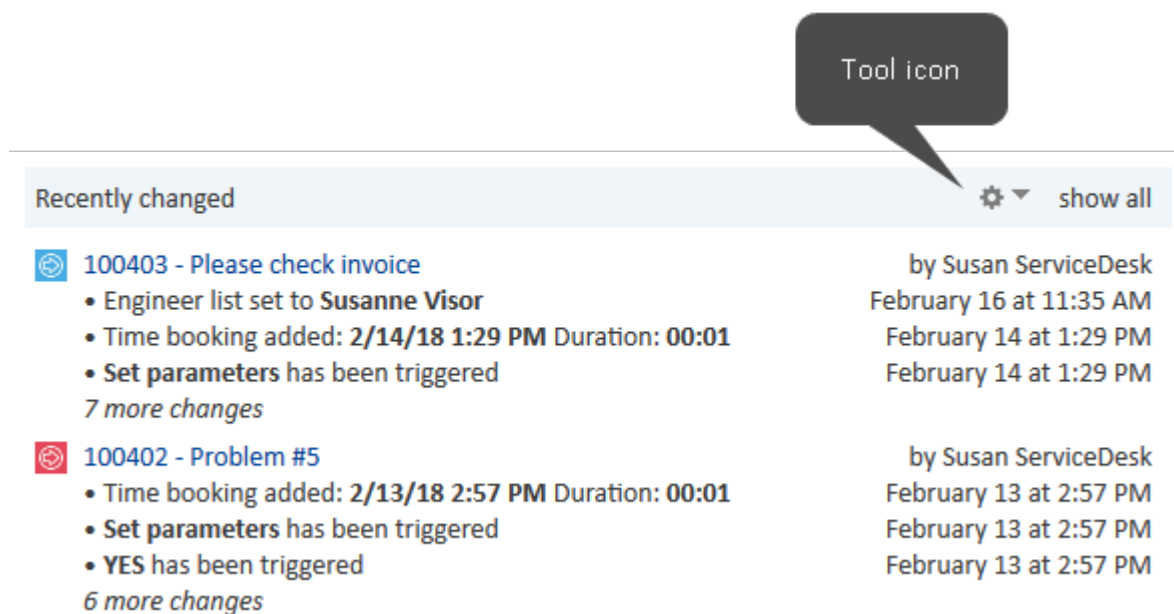


Figure 11: Example of a Recent changes widget

#### B.2.3.4 Customer group filter

Customer groups are used to manage different kinds of contacts within the same CM system. The customer group determines which contact data model is used for its contacts, i.e., which data fields are available and which relations and activities are possible for the contacts.

If you have access to more than one [customer group](#), you can choose one of these customer groups in the **customer group filter**.

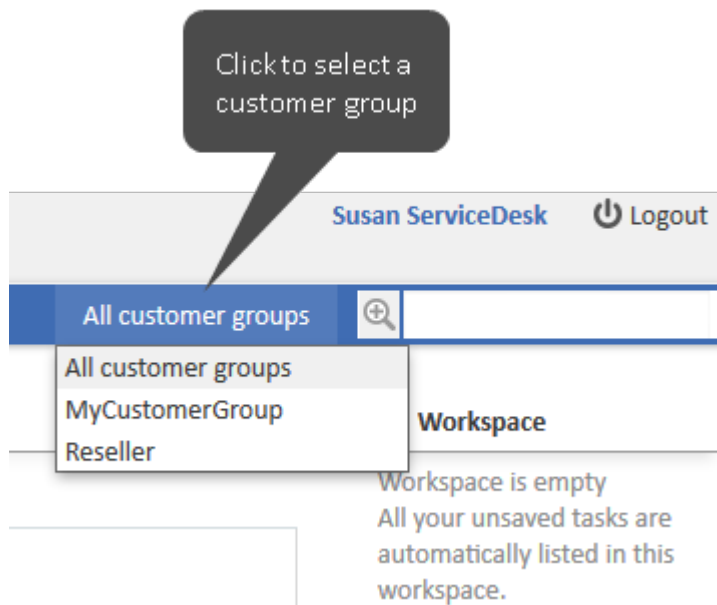


Figure 12: The customer group filter

Only the selected customer group will be shown on the user interface. This setting takes effect in the following areas:

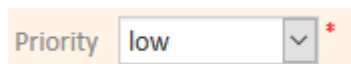
- You can only **create contacts** in this customer group.
- You can only **select contacts** from this customer group in cases.
- The **Quick Search** is limited to the selected customer group, i.e., it shows only the results from the selected customer group.
- The **Detailed Search** is limited to the selected customer group, i.e., it does not offer the customer group as a search criterion anymore.

## B.2.4 Data fields

This section describes the different kinds of data fields which are used in the Web Client.

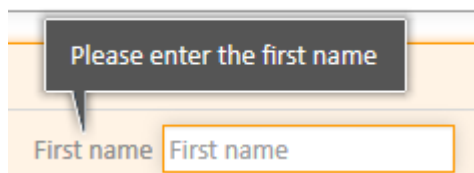
- [Red asterisks](#)
- [Data entry fields](#)
- [Date fields](#)
- [Text boxes](#)
- [Links](#)
- [Checkboxes](#)
- [Radio buttons](#)
- [Drop-down lists](#)
- [Autocomplete lists](#)
- [Hierarchical lists](#)
- [Tables](#)
- [Rich text fields](#)
- [Special fields](#)

### B.2.4.1 Red asterisks



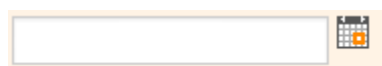
A red asterisk indicates that a field is mandatory. It has to be filled out before you can save your changes to the current page. This applies to all types of data fields.

### B.2.4.2 Data entry fields

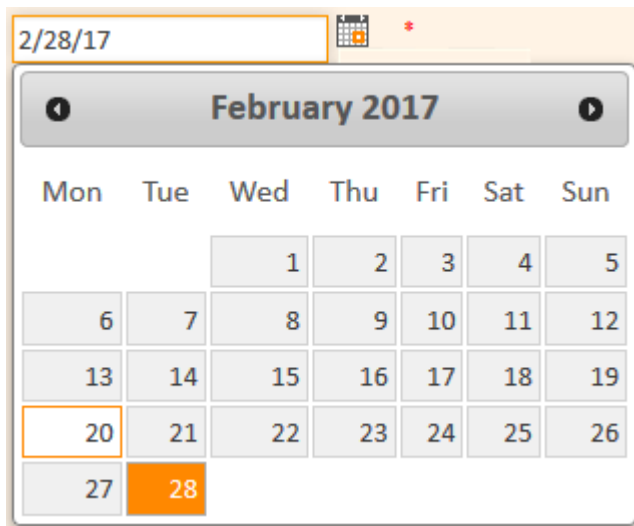


You can enter text or numbers in data entry fields. Some fields have restrictions, e.g., it might be possible that a certain field only accepts numbers. The meaning of a data field, i.e., the kind of data you should enter there, can be indicated by a label, and/or an inline text. A tooltip can provide additional information about a data field.

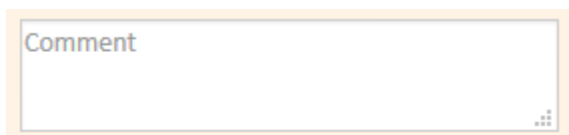
### B.2.4.3 Date fields



Date fields are indicated by a little calendar icon. If you click the calendar icon, a calendar opens and you can pick the desired date. You can also enter the date manually.



#### B.2.4.4 Text boxes



You can enter text into text boxes. Compared with data entry fields, text boxes are provided for longer text entries which can also contain line breaks, e.g., longer comments.

**i** If you click the lower right corner of a text box, you can drag it to enlarge the size of the box.

#### B.2.4.5 Links

Some text fields can be configured to contain a link to open a website or file, or write an email. These text fields look like normal text fields but you can only enter a valid path. Otherwise the Web Client shows an error message. In view mode you can click the link to open the website or file, or to write an email using your email client.

The following formats are allowed:

- URLs have to start with **http://** or **https://**, e.g. *http://www.consol.de*
- File links have to start with **ftp://** or **https://** if the file is saved on an FTP server, or **file://** if the file is saved on a file server, e.g. *ftp://ftp.consol.de/myfile.doc* or *file://fileserverserver/myfile.doc*
- Email addresses have to start with **mailto:**, e.g. *mailto:luke@consol.de*

**i** If you do not use any of the above mentioned protocol identifiers, the system assumes the your link starts with **http://**.

You can enter a display name for the link by typing a space and entering the text to be displayed instead of the link. For example, “<http://www.consol.de> ConSol Website” is displayed as follows:

ConSol GmbH  
 DU: <http://www.consol.de>  
 Kar 40472 Düsseldorf  
[ConSol Website](#)

#### B.2.4.6 Checkboxes

☐ Ask for feedback

Checkboxes can be activated (checkmark is set) or deactivated (checkmark is not set). An activated checkbox means **yes**, a deactivated one means **no**.

#### B.2.4.7 Radio buttons

VIP ☐ Yes ☐ No

Radio buttons let you choose between different values. Click the radio button with the desired value to select it. You can only choose one value from a group of radio buttons, i.e., multiple values are not possible here.

#### B.2.4.8 Drop-down lists

Priority high ▼ \*

- low
- normal
- high

Drop-down lists contain a list of predefined values. When a drop-down list is displayed grayed out, you cannot choose data, because you do not have the necessary permissions or data entry is not intended at this point. You can only choose one value from the list.

#### B.2.4.9 Autocomplete lists

Engineer on duty

Choose one

NOTE: Please type at least 3 characters!

Engineer on duty

Choose one

Sus

Susanne Visor

Susan ServiceDesk

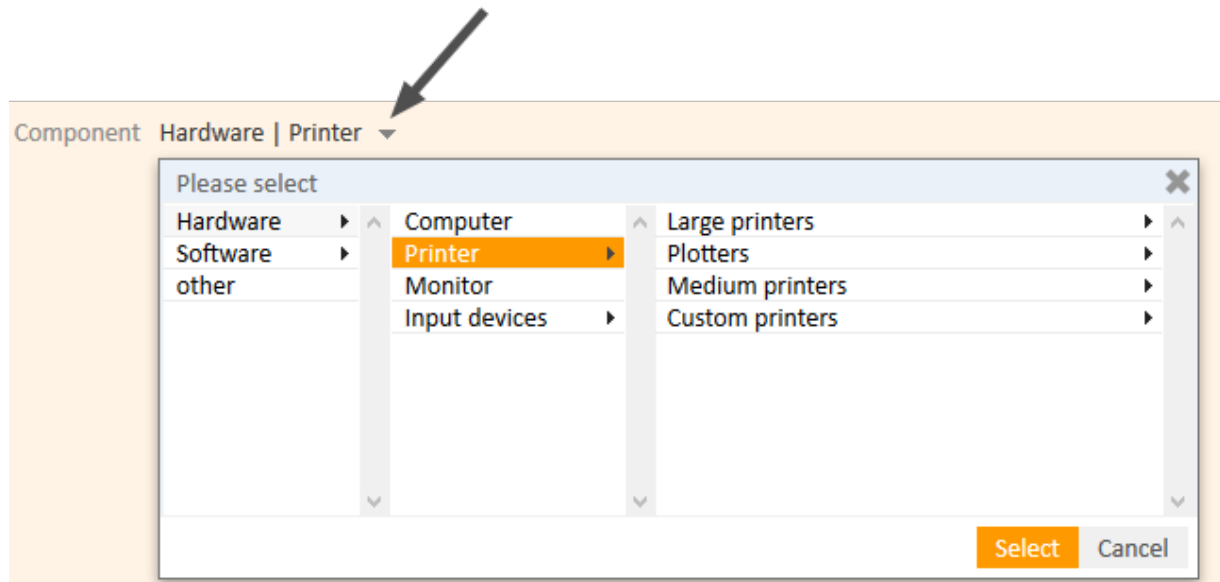
Autocomplete lists are dynamic lists. You can enter a keyword to display the corresponding objects (users, cases, contacts or resources) in the list. Then you select the desired object. The above figure shows an autocomplete list which displays a message to enter at least three characters to start the search. The results are displayed upon entering the required characters.



#### B.2.4.10 Hierarchical lists

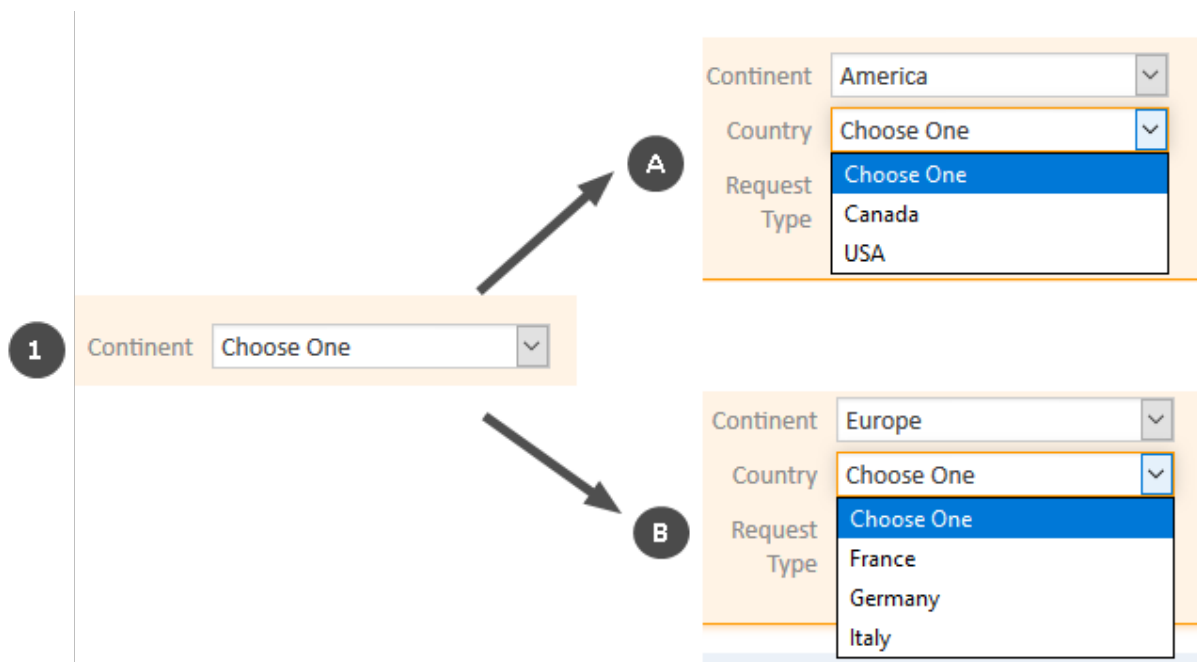
Hierarchical lists can be displayed as MLA (Multi Level Attribute, displayed in a box) or as individual drop-down lists. They provide tree-like data structures, which allow you to select the desired value by navigating through a hierarchy.

##### MLAs



To select a value within an MLA, click the little arrow to open the box (see above figure). Select an entry from the first list on the left. If the selected entry has a little arrow next to the value, a new list is opened to its right. The values available in the new list depend on the chosen entry. This way you can navigate through several hierarchical levels. You can click *Select* to select the current entry at any time.

### Dependent drop-down lists



To select a value, choose an entry from the first drop-down list. Depending on your selection, additional drop-down lists are displayed and/or the values available in the other drop-down lists change. The above example shows that the entries available in *Country* vary depending on the selected continent.

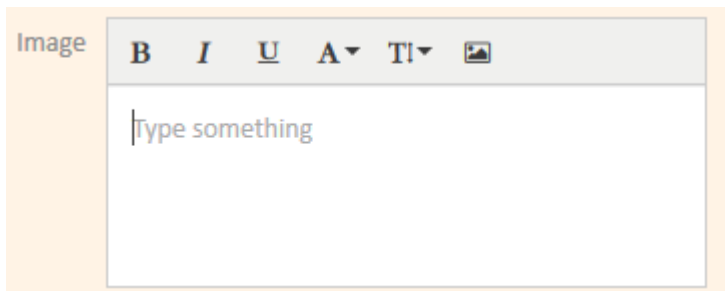
#### B.2.4.11 Tables

Orders				2
1	Hardware	Contact person	Number	
	Large printers ▾	John	123	✕
	Custom printers ▾	Luise	654	✕
	<a href="#">Add row</a>			

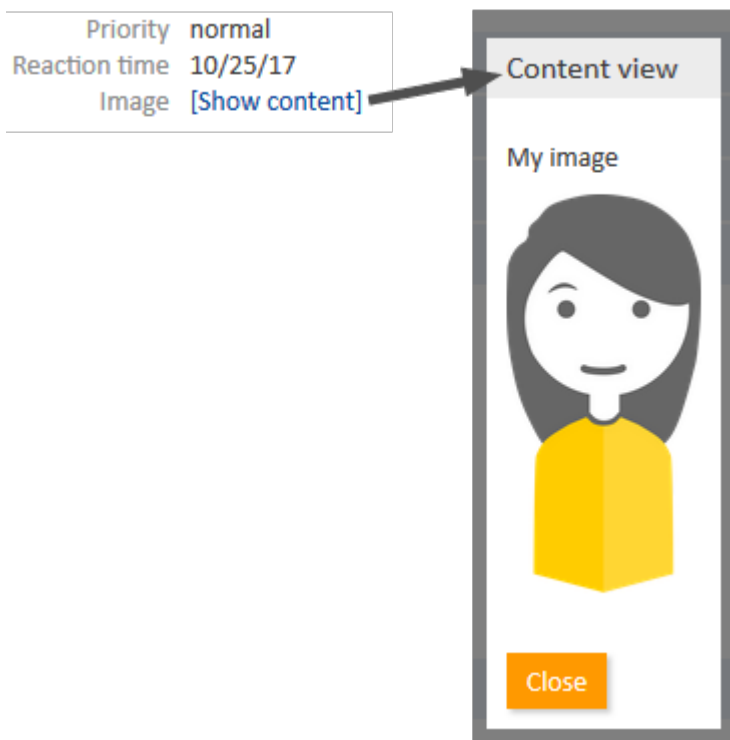
Tables can contain data entry fields, drop-down lists, MLAs, or checkboxes. For some tables it is possible to add rows by clicking *Add row* (1) and/or to delete rows by clicking the cross icon at the end of a row (2).

#### B.2.4.12 Rich text fields

Rich text data fields can contain images and text with some formatting. They have a basic editor for adding and editing the field content.



In the view mode, the content is either displayed directly, or there is a *Show content* link to display the field content in a pop-up window called *Content view*:



#### B.2.4.13 Special fields

Some fields can have special visualization features. In the view mode, they can show for example images, charts or maps. It depends on the individual configuration of your CM system, if such fields are available, which values they have in the edit mode and how they are displayed in the view mode.

Please note that, depending on the configuration of your CM system, pictures, charts, maps or other graphical elements might be displayed in the display mode only if the corresponding field (e.g., a string field) has content.

## B.2.5 Relation graphs

Case, contact page, and resource page sections which show linked objects (all kinds of relations, contacts of a case, persons of a company, cases of a contact) can be displayed in two modes:

- **List:** standard display from previous versions of ConSol CM
- **Graph:** new graph display

You can switch between the list view and the graph view using the *List* and *Graph* links next to the section heading. The *Graph* link is only displayed if the section includes at least one relation.

The objects in the graph are represented by their icons. Two icons representing linked objects are connected with an arrow. When the graph view is selected, there is no counter stating the number of relations in the section header. The lower right corner of the graph includes buttons to zoom in and out and restore the default zoom. A tooltip is displayed when the user hovers over an icon or clicks an icon. Double-clicking an icon opens the page of the respective object. You can use drag-and-drop to move the objects within the graph.

The level of detail displayed in the graph depends on the number of objects and the zoom factor. The graph always shows the icons of the objects and the arrows between related objects. If there is enough space on the canvas, it also includes the description of each object and the type of relation between two objects.



The main purpose of the graph view is providing a better visualization of the relations. Depending on the section, you might have to switch to the list view for managing the relations.

The following figure shows the relation graph for the *Contacts* section of a case which has a main contact and an additional contact. Note that the description of the root object (the object of the current page, in this case the case), is displayed in bold.

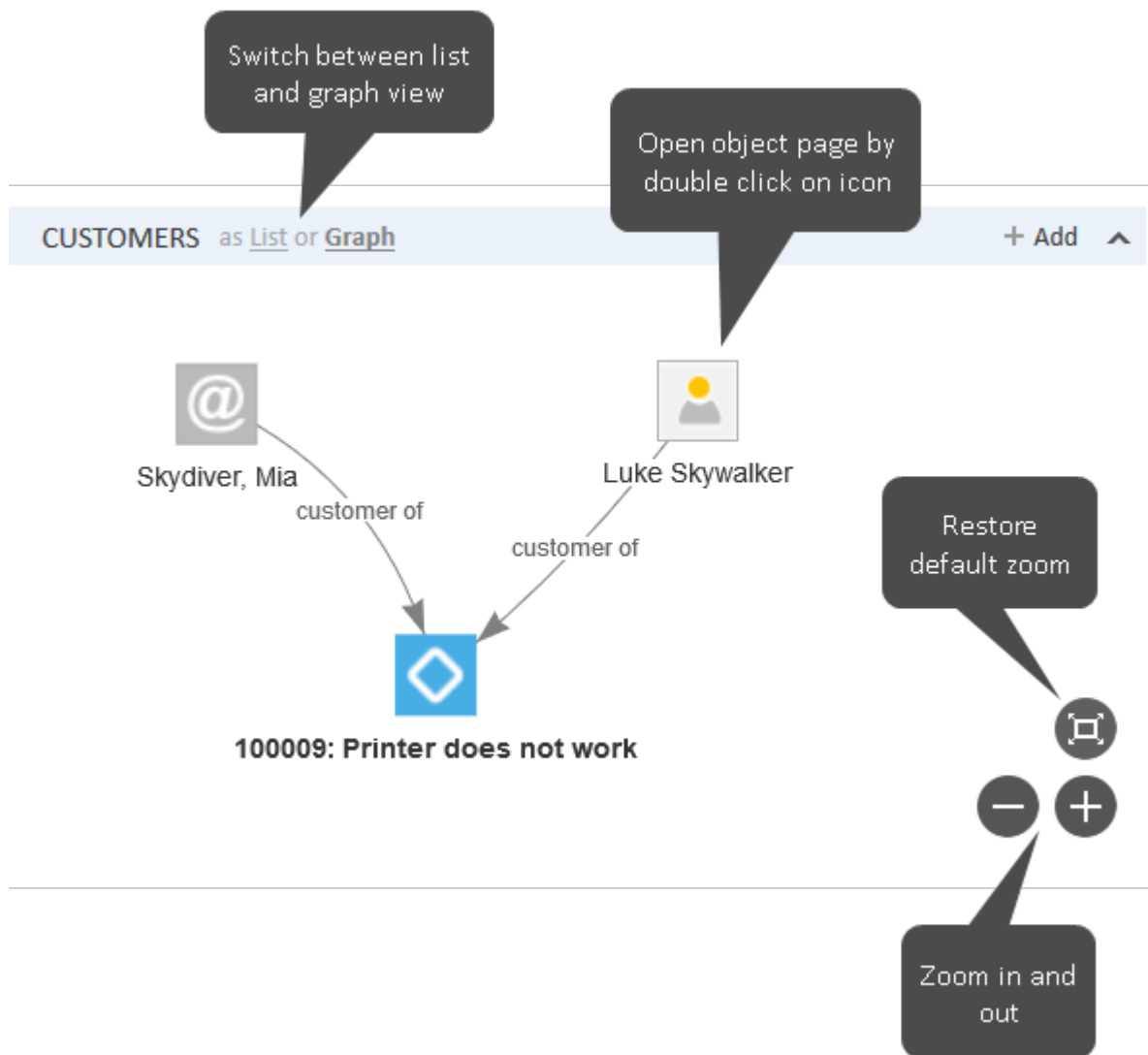


Figure 13: *Relation graph in the Contacts section of a case*

By default, both the list and the graph show the same relations. Nevertheless, your CM system can be configured to display other relations in the graph view. For example, the list view of the *Related Resources* section of a case displays the resources which are directly related to the case, while the graph view also displays the contacts which are related to these resources. It is also possible that the layout of the graph is customized.

**i** Depending on the individual configuration of your CM system, cases, contacts, and resources can have an additional section for a customized relation graph. The content of this graph depends on the individual configuration of your CM system.

## B.3 Search features

You can find specific cases, contacts, and resources in the Web Client by using one of the search features. The following search features are available:

- [Quick Search](#)
- [Detailed Search](#)
- [Autocomplete Search](#)

## B.3.1 Quick Search

This chapter explains the features of the Quick Search.

- [Introduction](#)
- [Features of the Quick Search](#)
- [Search results](#)
- [FAQs](#)

### B.3.1.1 Introduction

The Quick Search provides a quick and easy way to find cases, contacts, and resources. It is located in the upper right corner of the Web Client. When you enter something in the Quick Search field, the matching search results are shown immediately below the Quick Search field.

The Quick Search is your first point of access when you need to locate something in the Web Client. Example use cases are:

- You receive a call from a contact and want to open his contact page.
- You receive a call regarding a case and want to open it quickly.

The following information is important to know about the Quick Search:

- You can enter multiple search words, they have to be divided by a space character.
- By entering more search words you narrow down the search, because the search terms are connected via AND relation. For example, when you search for “consol coffee”, you only get results which contain both “consol” **and** “coffee”.
- Search words consisting of more than one character or number have implicitly an asterisk search operator (\*) at their end. This placeholder stands for any number of any characters at the end of the search word. For example, the search results for the search word *coffee* will also contain words like “coffees” or “coffee-colored”. You can also manually add a “?” as a placeholder for a single character within a search word, e.g., if you search for “Joan” or “John” you can enter *Jo?n*.
- Depending on the item you search for, phonetic search might be available. In this case the Quick Search also returns results which have a similar pronunciation but a different spelling, e.g., a search for the name *Claire* returns “Claire”, “Clare” and “Clair”. This option might be available for text fields.



The exact behavior of the search depends on the individual configuration of your CM system.

### B.3.1.2 Features of the Quick Search

The following figure shows an example to illustrate the features of the Quick Search.

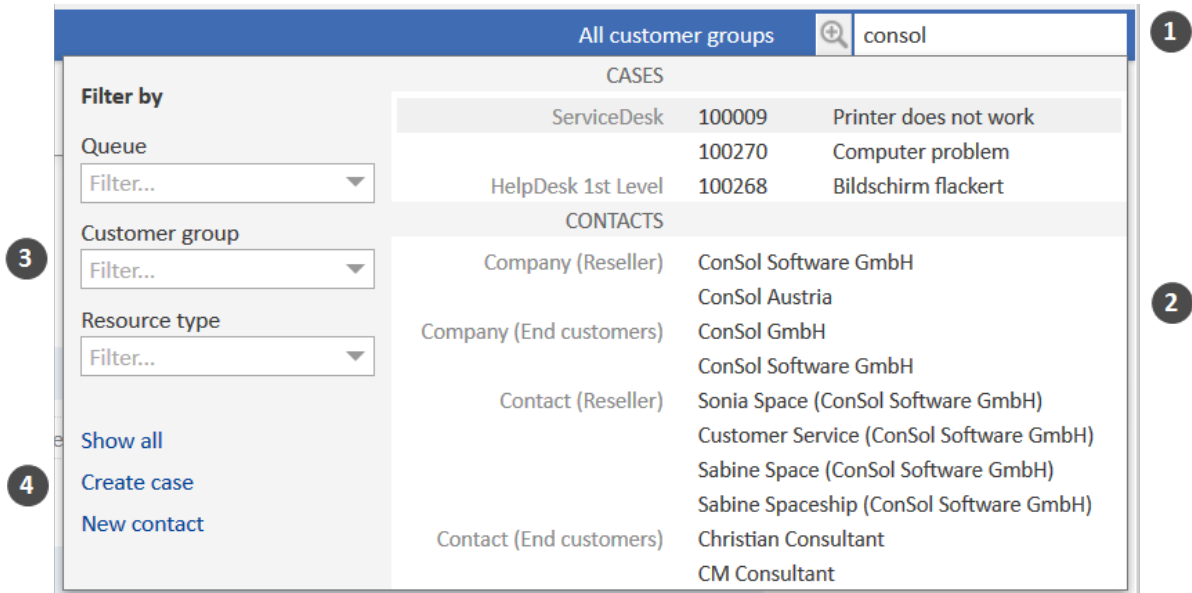


Figure 14: Quick Search

- (1) Entry field of the Quick Search: *consol* entered as a search string
- (2) Search results grouped by queue (cases), customer group (contacts) and resource type (resources)
- (3) Filters to limit the results to the selected queues, customer groups or resource types. If you select several filters, results for each filter are displayed. You can select several values within a filter. Selecting all values in a filter is equivalent to selecting none of the values from a filter, i.e. the results are not filtered.
- (4) Direct links within the Quick Search for jumping to the [Detailed Search](#) (*Show all* link), [creating a new case](#) (*Create case* link), and [creating a new contact](#) (*Create contact* link).


### B.3.1.3 Search results

You can use the Quick Search to find cases, contacts, and resources. The following table shows which objects are found.

Object	Search string contained in
Case	<ul style="list-style-type: none"> <li>• Case number</li> <li>• Case subject</li> <li>• Case fields which are configured to be searched</li> <li>• Name of the case contact</li> <li>• Name of the assignee</li> <li>• Name of an additional assignee</li> </ul>



Object	Search string contained in
Contact	<ul style="list-style-type: none"> <li>Contact fields which are configured to be searched, usually the contact name</li> <li>Company which the person belongs to</li> </ul>
Resource	<ul style="list-style-type: none"> <li>Resource fields which are configured to be searched</li> <li>Resource type which the resource belongs to</li> </ul>

 The Quick Search may not show all results for the entered search string. The number of search results and the way they are displayed depends on the individual configuration of your CM system. Use the [Detailed Search](#) (by clicking the *Show all* link or the magnifying glass) if you want to display a complete list.


#### B.3.1.4 FAQs


##### Which cases do I find via Quick Search?

Via Quick Search you can find all cases which match the search criteria and are currently in processes for which you at least have read permission and which have a main contact from a customer group for which you at least have read permission (see [Visibility of cases](#)). The Quick Search results show open cases as well as already closed cases.

##### Which contacts do I find via Quick Search?

Via Quick Search you can find all contacts which match the search criteria and which are in customer groups for which you at least have read permission (see [Visibility of contacts](#)).

 The search results are limited to the customer group selected in the customer group filter in the main menu. If it is set to *All customer groups* the search will return results for all customer groups. Otherwise, only contacts belonging to the selected group will be found.

 If you search for a contact, you also find cases and resources related to this contact.

##### Which resources do I find via Quick Search?

Via Quick Search you can find all resources which match the search criteria and for whose resource type you have at least read permission (see [Visibility of resources](#)).

## B.3.2 Detailed Search

This chapter explains the features of the Detailed Search.

- [Introduction](#)
- [Features of the Detailed Search](#)
- [Working with the search results](#)
- [FAQs](#)
- [Relations between the search criteria](#)

### B.3.2.1 Introduction

The Detailed Search provides extensive search functionalities. You can use several search criteria. All the results are displayed in a table, where you can carry out additional actions.

You can access the Detailed Search by clicking the magnifying glass icon within the Quick Search or by clicking the *Show all* link below the Quick Search results. In the latter case, the search words from the Quick Search (including the implicitly present asterisk at the end of each word) are populated to the *Keyword (Pattern)* field.

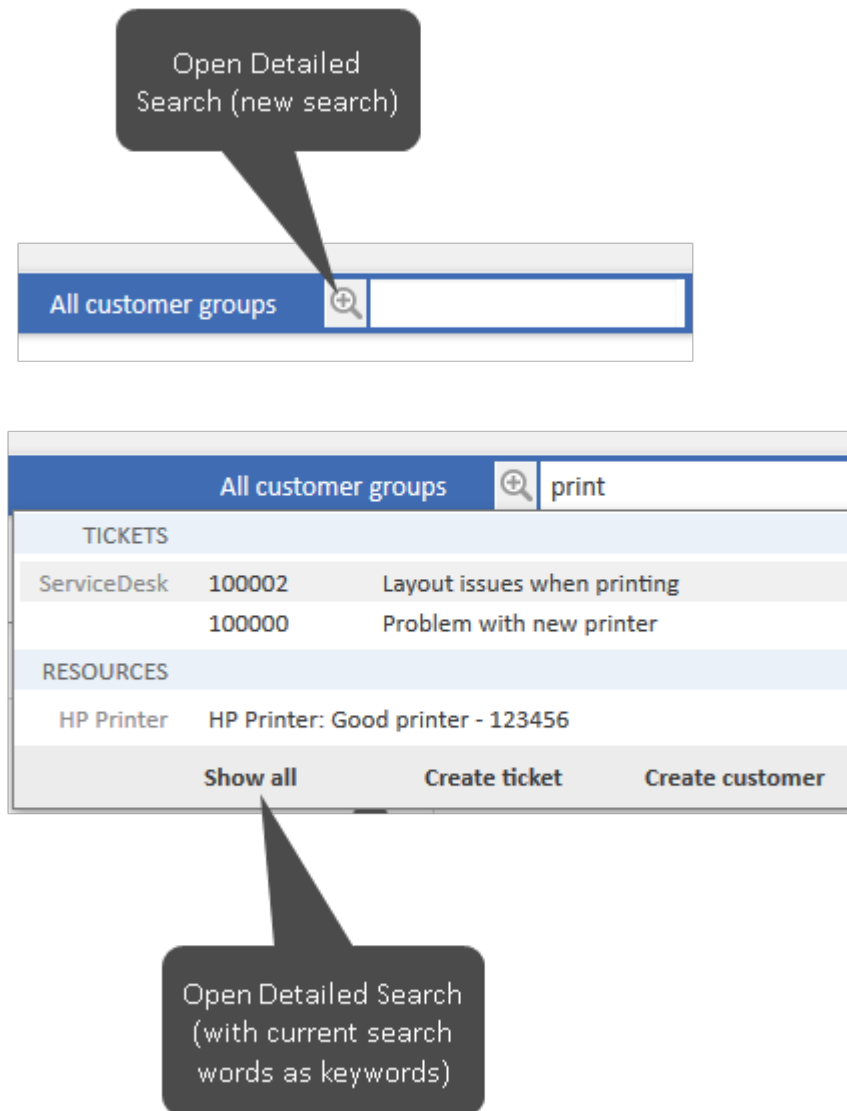


Figure 15: *Opening the Detailed Search*

The Detailed Search enables you to search for cases, contacts, and resources using multiple search criteria. The Detailed Search simultaneously searches for cases and contacts. The tabs in the lower area of the Detailed Search allow you to choose if you want to show cases, contacts (grouped by customer groups unless you limit the results to specific customer groups using search criteria or the [customer group filter](#)), or resources.

A Detailed Search could be, for example, “Show only results with priority *high*”. In this case, the result list would contain:

- **Cases** with priority *high*
- **Contacts** who are the main contact or an additional contact for a case with the priority *high*

If you want to search for resources, you have to go to the *Resources* tab first and select the desired *Resource type*.

Every search criterion narrows down the search. Each search criterion is shown in a single row.

The screenshot shows a search interface with a header bar containing a search icon and the word "Search". Below this is a section titled "Search criteria". There are three criteria listed:

- Keyword (Pattern):** A text input field containing "printer". To its right is a trash icon.
- Engineer:** A text input field containing "ServiceDesk, Susan". To its right is a trash icon.
- Creation date:** A dropdown menu showing "after", followed by a date input field containing "2/1/17". To the right of the date field is a calendar icon, a trash icon, and a plus sign.

At the bottom right of the criteria section is an orange button labeled "Search".

Two callout boxes are present: one labeled "Search icon" pointing to the magnifying glass icon in the header, and another labeled "Search criteria" pointing to the "Search criteria" section header.

Figure 16: Detailed Search with three search criteria

### B.3.2.2 Features of the Detailed Search

The following figure shows an example to illustrate the features of the Detailed Search.

**Search**

**Search criteria**

1 Status **Open tickets** 2

Engineer **Susan ServiceDesk x** 3 + 4 **Search**

5 ☐ Deactivated incl.

6 ☐ Use phonetic search

7 **Direct customers (Company)** **End customers (Contact)** 8

**Search results (27)**

9 1 2 3 > >> 1 to 10 of 27

Contact	First name	Lastname
Mr Werner Workflowuser	Werner	Workflowuser
Mr Dieter Macher	Dieter	Macher
Mrs Minnie Mouse	Minnie	Mouse
Mrs Wilma Flintstone	Wilma	Flintstone
Mr Dagobert Duck	Dagobert	Duck
Mr Max Mustermann	Max	Mustermann
Mrs Mia Skydiver	Mia	Skydiver
Mrs Maria Miller	Maria	Miller
Mr Dietrich Habermann	Dietrich	Habermann
Susanne Stuller	Susanne	Stuller


10

11 Number per page 10 > 1 to 10 of 27

Figure 17: Detailed Search

- **Search criteria (1)**

The results of the Detailed Search will match these criteria.

 Some search criteria allow you to choose one or several values from a drop-down list. Depending on your system configuration, a drop-down list can contain values displayed in italics. This means that the value is deactivated, i.e. it can be set in existing objects but you cannot set it anymore. It is still possible to search for objects with this value though.

In the field *Keyword (Pattern)* you can enter search terms (text, numbers) and use different search operators. Please take the following into account when using operators in the *Keyword (Pattern)* field.

- Do not use the search operators AND or OR. A space character already implies an AND relation between the search terms. An OR relation can only be established for certain search criteria when multiple selection is possible (see [Relations between the search criteria](#) below).
- You can use the asterisks search operator (\*) as a placeholder for any number of characters.
- You can use the question mark search operator (?) as a placeholder for a single character.

- **Recycle bin (2)**

Click this button to delete a search criterion.

- **Plus icon (3)**


Click this button to add a new search criterion. The new button *Please select* is displayed. You can choose the desired criterion from the list. Depending on the criterion, you can choose one or several values.

- **Search (4)**

Click this button to perform the search with the current search criteria.


- **Deactivated incl. (5)**

Select this checkbox if you want to show deactivated contacts or resources in the search results.

 The checkbox *Deactivated incl.* is only displayed if you clicked on a tab of a customer group or the *Resources* tab (see 6). If the tab for cases is chosen, the checkbox is not displayed.


- **Use phonetic search (6)**

Select this checkbox if you want to display search results which have a similar pronunciation but a different spelling, e.g. a search for the name *Claire* returns results for “Claire”, “Clare”, and “Clair”.

 The checkbox *Use phonetic search* is only displayed if the phonetic search is enabled for at least one field which belongs to the objects of the selected tab.

- **Search result tabs (7)**

Click the desired tab to switch between the results for cases, the results for the different customer groups, and the results for resources.

 When you switch to the *Resources* tab, any previously entered search criteria which do not apply to resources (e.g., *Assignee*, *Process*, or *Status*) are removed and you can only select relevant search criteria.

- **Display hidden tabs (8)**

This button is displayed if there are additional tabs which are not shown due to lack of space on the screen. Click this button to select the tab you want to display.

- **Column selection (9)**


Click this button to choose which columns are displayed in the search results.

- **Search results (10)**

In this section you see the results found in the search.

- **Number per page (11)**

Click here to set the number of search results which should be displayed on each page. This option is only displayed if there are more than 10 search results.


 You can add a Detailed Search to your [Favorites](#) to quickly access the Detailed Search itself or the cases matching its criteria.

### Search criteria

The Detailed Search offers several search criteria. You can find a detailed description in the table below.

Search criteria	Description
Keyword (Pattern)	Searches for free text in cases and contacts.
Archived	Searches for archived or non-archived cases.
Close date	Searches for cases which have been closed in a specified date range.
Creation date	Searches for cases which have been created in a specified date range.
Assignee	Searches for cases which are assigned to one or several selected users, unassigned cases, or assigned cases.
Process	Searches for cases which are in one or several selected processes.
Referenced assignees	Searches for cases which have one or several selected additional assignees. You can narrow down the search to find only cases where the selected user has a specific function, or cases which have a certain approval status.
Status	Searches for open cases or for closed cases.
Subject	Searches for a keyword from the case subject.

Search criteria	Description
View	Searches for cases which are shown in one or several views from the case list.
<b>Case fields</b>	The searchable case fields are listed by case field group. Depending on the field type, you can select a value from a list, select a date, or enter a keyword. The available case fields depend on the individual configuration of your CM system.
Company	Opens an autocomplete field where you can select a company.
Person	Opens an autocomplete field where you can select a person.
Customer group	Searches for contacts belonging to one or several selected customer groups.
<b>Contact fields</b>	The searchable contact fields are listed by contact data model. Depending on the field type, you can select a value from a list, select a date, or enter a keyword. The available contact fields depend on the individual configuration of your CM system.
Resource type	This search criteria is only available if you clicked the <i>Resources</i> tab. Select a resource type to limit the display of the available resource fields.
<b>Resource fields</b>	The searchable resource fields are determined by the selected resource type. Depending on the field type, you can select a value from a list, select a date, or enter a keyword. The available resource fields depend on the individual configuration of your CM system.

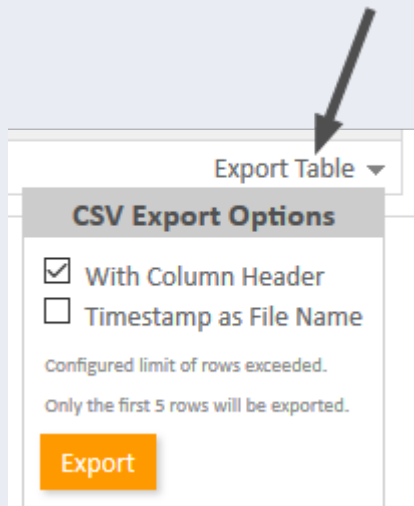
 When you search for cases, you can switch to a contact tab to see the contacts which belong to the cases you found. In the same way, you can switch to the *Cases* tab to see the cases of the contacts you have found.

### B.3.2.3 Working with the search results

You can perform several actions with the results of a Detailed Search. It is possible to change the display of the results table by [adjusting the table columns](#) or [displaying the results as a grid](#). In addition you can [open a search result](#) or [carry out a search activity](#).



- i** Depending on your system configuration, you might be able to export the search results to a CSV file. In this case, there is a link *Export Table* below the *Search results* table. There you can choose whether you want the file to have a header row and a timestamp and start the export.



### Adjusting the table columns

You can resize the table columns by dragging each column to the desired width. This allows you to adapt the table display to the content, e.g. to show long case subjects.

You can determine the columns which the result table should contain. To do so, click the little arrow next to the wheel icon. You can remove existing columns by clicking the cross next to the column name. To add new columns, click in the white space next to the names of the displayed columns to see a list of all available columns, or start typing the column name and click one of the suggested columns. Select the desired columns which should be additionally displayed. You can rearrange the columns within the *Search results* table by dragging-and-dropping each column to the desired position.

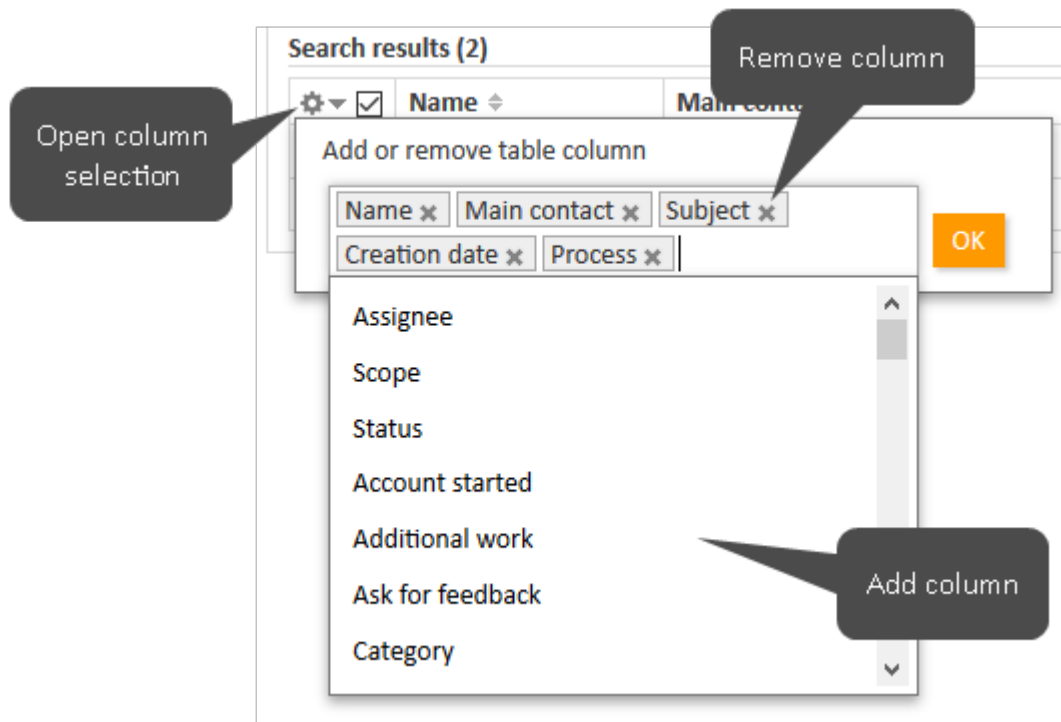


Figure 18: Selecting the columns in a Detailed Search

**i** Your column configuration is saved when you [add the Detailed Search to the Favorites](#).

#### Opening a case, contact, or resource

The search results on the *Contacts* tabs lead you directly to the respective contact pages. If you click a search result, the respective contact page (company or person) is opened automatically. The same applies to resources in the *Resources* tab.

The *Cases* tab allows you to open either the case or the contact page. If there is a column containing the case's main contact, you can click the name of the contact, which is a link, to open the respective contact page. In the same way, there can also be a column containing a link to the case. If you click another column, the case preview is opened within the *Search results* table. You can then open the case or switch to the preview of the next case in the list.

**i** It depends on the individual configuration of your CM system if the case preview is available.

The case preview always shows the case's last comment or email. The following features are available:

**Tickets**   End customers (Contact)   End customers (Company)   ▾

View as:   ☒ List   ☐ Grid

**Search results (2)**

⚙️ <input checked="" type="checkbox"/>	Engineer ▾	Name ▾	Main Customer	Subject ▾
<input checked="" type="checkbox"/>	ServiceDesk, Susan	100000	Mr Luke Skywalker	Problem with new printer
<input checked="" type="checkbox"/>	ServiceDesk, Susan	100002	Mr Luke Skywalker	Layout issues when printing

**3** Latest email from Luke Skywalker <Luke.Skywalker@consol.de> 2/20/17 5:05 PM ... ^

**4** | Attachments (2)

**5** Please check the attached images

**6** Am 20.02.2017 um 17:03 schrieb cmdoku5@consol.de:

**7** Viele Grüße  
--  
Susan ServiceDesk  
-Service Agent-  
ConSol Software GmbH  
Franziskanerstraße 38  
81669 München

Export Table ▾

Figure 19: The case preview

- (1) Link to open the case
- (2) Link to open the case's main contact
- (3) Button to show more details in the preview
- (4) Button to open the case in a new browser tab
- (5) Button to switch to the preview of the next result
- (6) Button to open a preview of the previous attachment (only attachments included in the last comment or email)
- (7) Button to open a preview of the next attachment (only attachments included in the last comment or email)

#### Viewing the search results as a grid

On the *Cases* tab, you can also display the search results as a grid. To do so, click the *Grid* button next to *View as*. In the grid view you can select a criterion to group the results (1). Initially, there will be one column for each active value of the grouping criterion. You can configure the displayed columns by selecting the desired columns in the *Add/Remove table column* field (2) (for grouping by assignee: *Add/Remove assignee*). Deactivated values are not shown by default, but you can still select them from the drop-down list, where they are displayed in italics. You can drag-and-drop cases from one column to another to update this value in the case (3). You cannot drag-and-drop a case into a column with a deactivated value though.

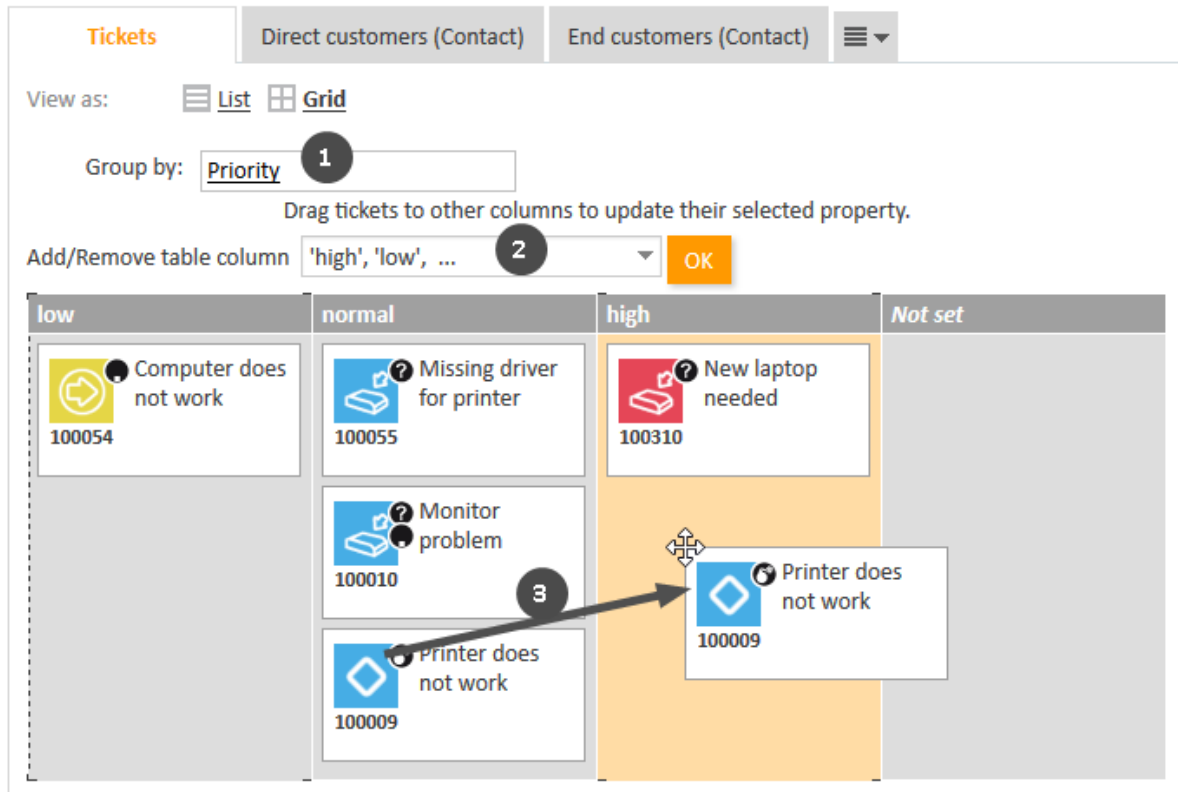


Figure 20: Viewing the results of a Detailed Search as a grid

### Performing search activities

Depending on the tab, one or several search activities might be available under *Activities* (1). Search activities are defined for each result type, i.e., when you view the *Cases* tab, you see other search activities than when you view the tab of a customer group. Click the desired activity to execute it. Please bear in mind that search activities are usually executed on all the results which are displayed in the *Search results* table at the moment and which have been selected using the respective checkbox (2). If there are several pages of search results, only the current page is considered.

**i** The specific behavior of each search activity depends on the individual configuration of your CM system. Your CM administrator might, for example, determine that all the results from all table pages are considered for the search activity, or that certain results are excluded because they do not meet a given condition.

The screenshot displays the 'Detailed Search' interface. At the top, there is a search bar with the text 'Search'. Below it, the 'Search criteria' section shows a form with 'Engineer' set to 'ServiceDesk, Susan' and a 'Please select' dropdown. A 'Search' button is visible. To the right, a sidebar contains sections for 'Activities' (with a count of 1), 'Workspace' (stating it is empty), and 'Favorites' (with a checkbox for 'Layout issues when printing').

The main area shows 'Search results (2)' in a table view. The table has columns: 'Engineer', 'Name', 'Main Customer', and 'Subject'. Two results are listed, both assigned to 'ServiceDesk, Susan'.

Engineer	Name	Main Customer	Subject
ServiceDesk, Susan	100000	Mr Luke Skywalker	Problem with new printer
ServiceDesk, Susan	100002	Mr Luke Skywalker	Layout issues when printing

An 'Export Table' button is located at the bottom right of the results table.

Figure 21: Available activities for the Detailed Search

Search activities can have a form which needs to be filled out before proceeding. See [Forms for activities](#) for further information. The data entered in the form is usually applied to all selected search results.

#### B.3.2.4 Relations between the search criteria

##### AND relation

All search criteria of the Detailed Search are connected with each other via an AND relation. For example, the search criteria “Assignee: *ServiceDesk, Susan*” and “Customer group: *MyContactGroup*” provide search results which match **both** search criteria:

- Cases which are assigned to Susan ServiceDesk **and** have the main contact or at least one additional contact from the customer group *MyContactGroup*.
- Contacts who belong to the customer group *MyContactGroup* **and** are a main contact or additional contact of at least one case assigned to Susan ServiceDesk.

The screenshot shows the 'Search criteria' section of the interface. It features two criteria: 'Engineer' set to 'ServiceDesk, Susan' and 'Queue' set to 'ServiceDesk'. Both criteria have a trash icon next to them. A 'Please select' dropdown and a 'Search' button are also present.

Figure 22: AND relation with different search criteria

**i** In contrast to previous ConSol CM versions, two search criteria which are columns of the same table are also connected with AND. If you search a table containing the names of persons for “Martin” in the *First name* column and “Smith” in the *Last name* column, you only find objects where the table contains a row with the values “Martin” and “Smith”.

## OR relation

Within a single search criterion there can be OR relations. When an OR relation is possible, the search criterion allows for multiple selections, i.e., you can choose any number of checkboxes from the drop-down menu. The choices for this criterion are displayed as a comma-separated list. For example, when the search criterion “View: *ServiceDeskAll*, *1st Level Open cases*” is chosen, the results will contain cases and contacts from the view *ServiceDeskAll* as well as cases and contacts from the view *1st Level Open cases*.

### Search criteria

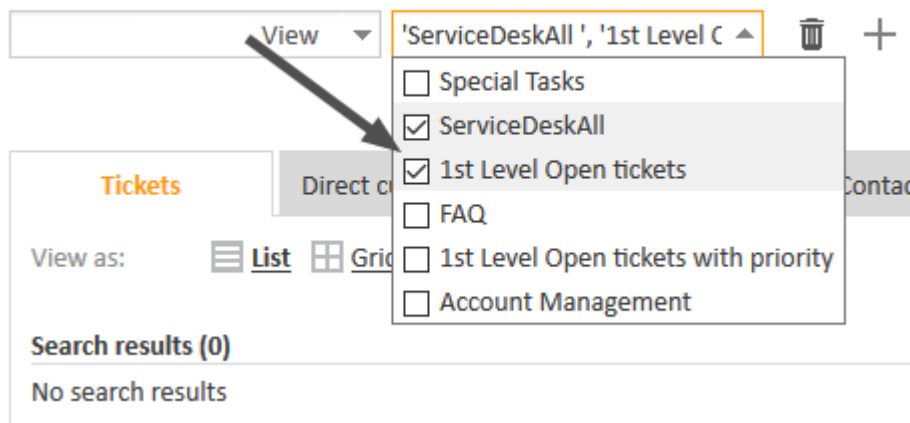


Figure 23: OR relation within one search criterion

Another possibility for OR relations are search fields, where you can select one item from the list and click again to select another item.

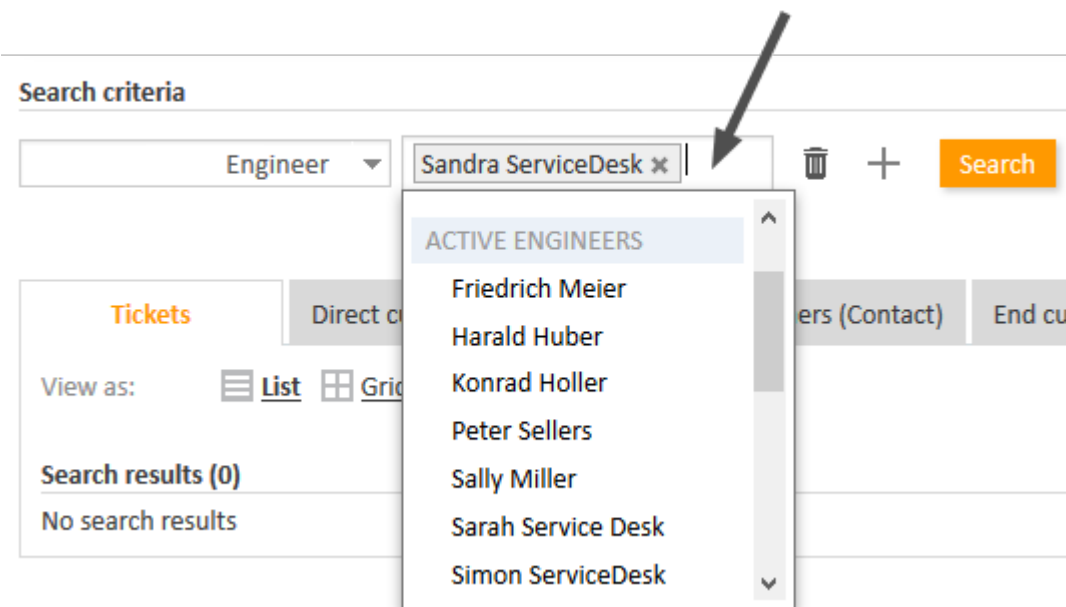


Figure 24: OR relation within one search criterion

If an OR relation is not possible, there is only one possible choice from a list in the drop-down menu:

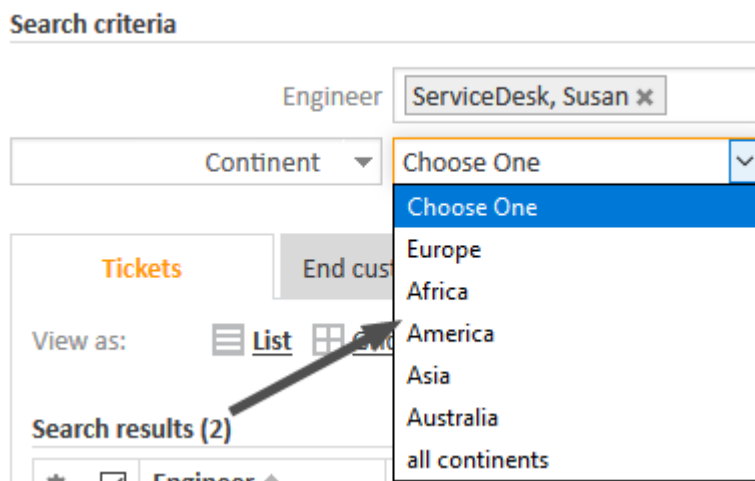


Figure 25: No OR relation within one search criterion possible

### B.3.2.5 FAQs

#### Which cases do I find via Detailed Search?

You can find via Detailed Search all cases which are currently in processes for which you at least have read permission and which have a main contact from a customer group for which you at least have read permission (see [Visibility of cases](#)). The Detailed Search shows open cases as well as already closed cases (unless you excluded one of them using the search criterion *Status*).

#### Which contacts do I find via Detailed Search?

You can find via Detailed Search all contacts which are in customer groups for which you at least have read permission (see [Visibility of contacts](#)).

**i** The search results are limited to the customer group selected in the customer group filter in the main menu. If it is set to *All customer groups* the search will return results for all customer groups. Otherwise, only contacts belonging to the selected group will be found.

The checkbox *Deactivated incl.* allows you to search for deactivated contacts. It is only displayed if you are on a tab which shows search results for a customer group.

#### Which resources do I find via Detailed Search?

You can find via Detailed Search all resources for whose resource type you have at least read permission (see [Visibility of resources](#)).

The checkbox *Deactivated incl.* allows you to search for deactivated resources. It is only displayed if you are on the *Resources* tab.

## B.3.3 Autocomplete Search


This chapter explains the features of the Autocomplete Search.


- [Introduction](#)
- [Examples](#)
- [FAQs](#)

### B.3.3.1 Introduction

The Autocomplete Search allows you to search for objects (cases, contacts, or resources) and select one of the search results. You can use the Autocomplete Search in the data fields which are configured for this purpose. As soon as you start typing in one of these fields, the Autocomplete Search is activated and shows suggestions which match your entry. If you choose one of the suggestions, the data of the corresponding object is used to fill out one or multiple data fields.

The exact fields which can be used for the Autocomplete Search depend on the individual configuration of your CM system.

 When a lot of suggestions match your entry, only a certain number of them are shown for reasons of clarity. If the desired data is not part of the currently shown suggestions, narrow the search by typing in more characters until the desired data is among the suggestions.


 You can use the asterisk to see possible entries.

### B.3.3.2 Examples

You can use the Autocomplete Search to search and select cases, contacts, resources, and users. The exact layout of the Autocomplete Search depends on the context where it is used. In addition, it depends on the individual configuration of your CM system how the results are displayed. The following two sections show examples of the Autocomplete Search.

#### Selecting a contact during case creation

When you create a new case, you have to provide a contact. Usually, you can use the Autocomplete Search to see suggestions on existing contacts. Choose one of the suggestions to select the corresponding contact.

 The number of results depends on the individual configuration of your CM system. If the desired contact is not among the suggested entries, type in more characters to narrow down the search.



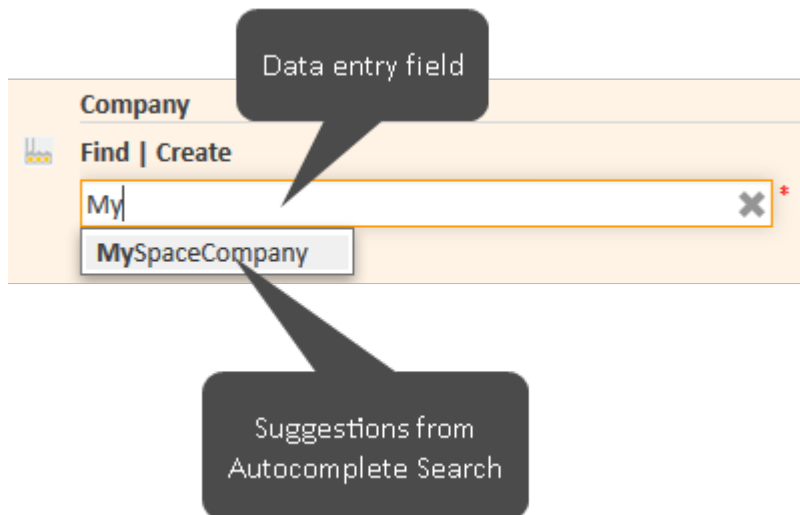


Figure 26: Autocomplete Search to select the company

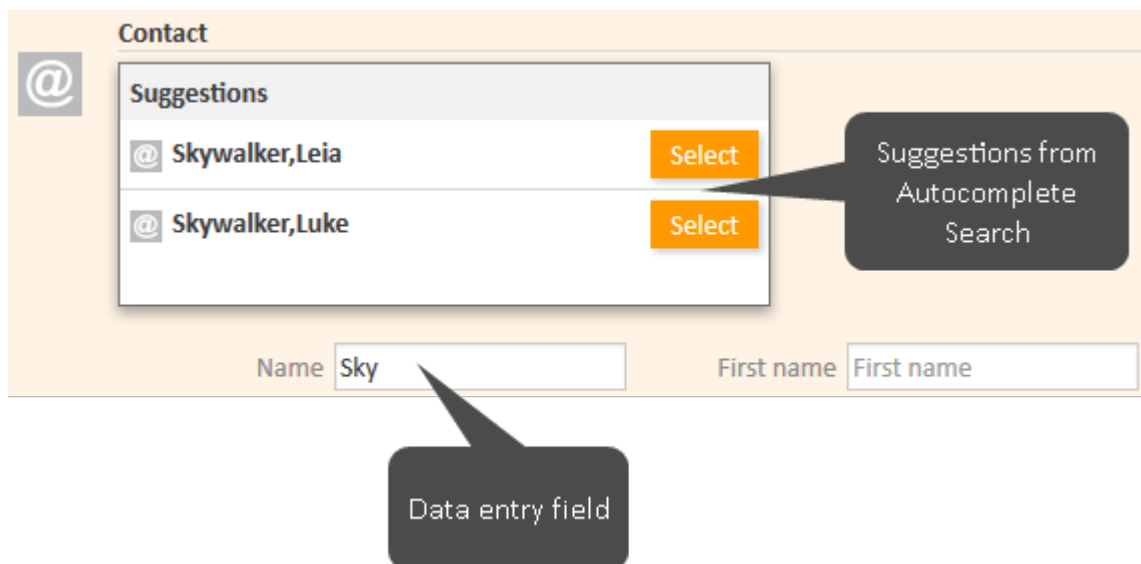


Figure 27: Autocomplete Search to select the person

### Creating a relation

When you create a relation to a case, contact, or resource, you can use the Autocomplete Search to see suggestions. Choose one of the suggestions to select the corresponding object as a target object of the relation.

**i** The number of results depends on the individual configuration of your CM system. If the desired object, a case in the below example, is not among the suggested entries, type in more characters to narrow down the search.

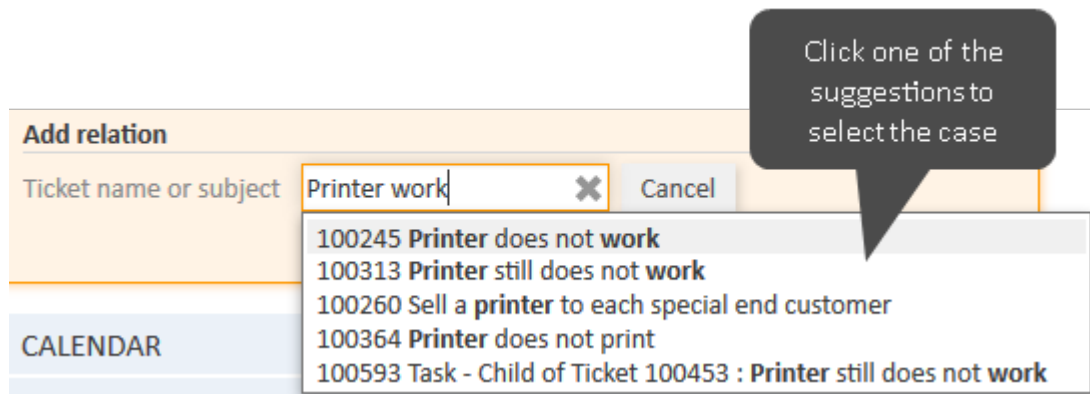


Figure 28: Autocomplete Search to select a case for a relation

### B.3.3.3 FAQs

#### Which cases do I find via Autocomplete Search?

Which cases you are able to find depends on the context. For example, if you are looking for cases within a time booking context, only cases where you can book time might be shown to you. Additionally, you will only see cases which are currently in processes for which you at least have read permission and which have a main contact from a customer group for which you at least have read permission (see [Visibility of cases](#)).

#### Which contacts do I find via Autocomplete Search?

Which contacts you are able to find depends on the context. For example, if you want to add a person to a case and already chose a company, the Autocomplete Search will only show persons which belong to the chosen company. Additionally, you will only see contacts which are in customer groups for which you at least have read permission (see [Visibility of contacts](#)).

**i** The search results are limited to the customer group selected in the customer group filter in the main menu. If it is set to *All customer groups* the search will return results for all customer groups. Otherwise, only contacts belonging to the selected group will be found.

#### Which resources do I find via Autocomplete Search?

Which resources you are able to find depends on the context. For example, when you want to create a relation to a resource, the Autocomplete Search will only show resources of the required resource type.

## B.4 Notifications

Notifications are short messages. They are used in two ways:

- The system sends a notification to a user. For example, to inform the user when a case is assigned to him or when an email is received in one of his cases.
- A user sends a notification to another user. For example, to ask for help regarding a case.

The notifications can be accessed from the bell icon next to the user's name (link to the user profile).

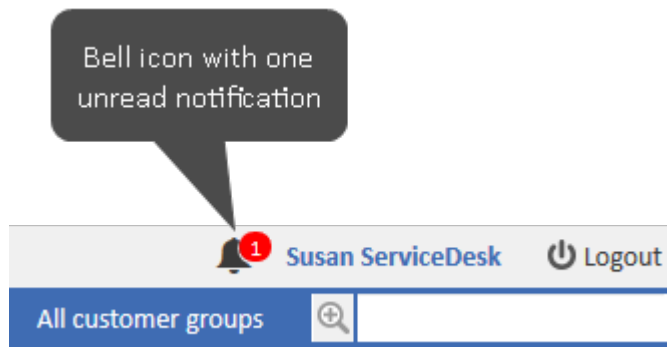


Figure 29: Bell icon with one unread notification

### B.4.1 Viewing notifications

The number of unread notifications is displayed in a red circle on the bell icon. Click the bell icon to view the notifications. You can pin a notification by clicking the pin icon on the right. Pinned notifications are displayed with a green background and the number of pinned notifications is displayed in a green circle on the bell icon. To remove the notifications you have read, click the *Clear all* button. Pinned notifications are not removed from the list.

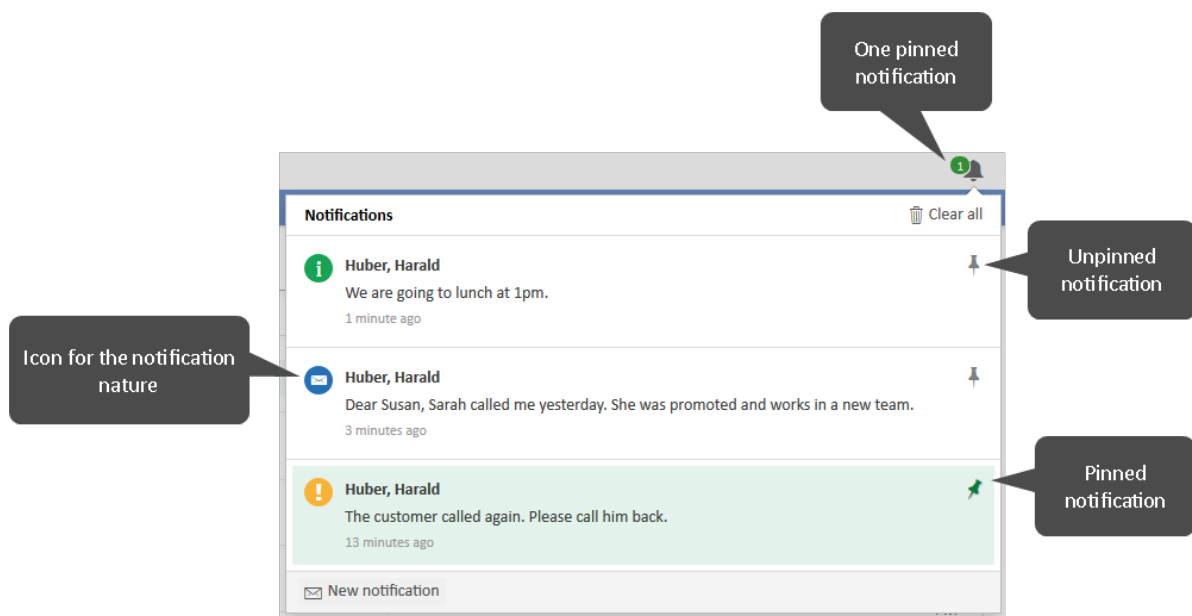


Figure 30: Viewing received notifications

Notifications which are sent by the system can include links to cases, contacts and resources.

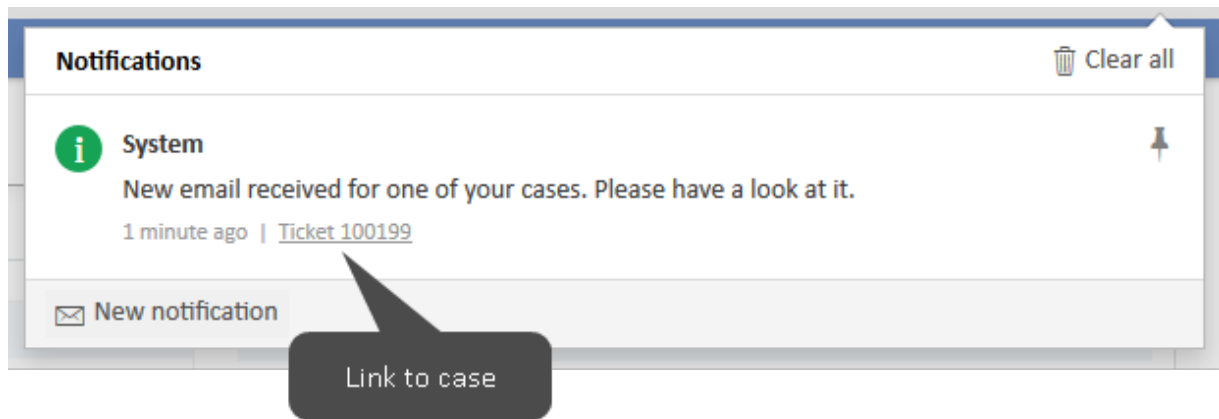


Figure 31: Notification with a case link

**i** If the notification text is longer than two lines, it is clipped, and you can click the *More* link to show the whole text.

## B.4.2 Sending notifications

You can send notifications to any other user. Please proceed as follows to send a notification:

1. Click the bell icon next to the link to your user profile.
2. Click the *New notification* button at the bottom of the notification window.
3. Enter the recipients in the *Select recipients* drop-down list. As soon as you start typing the name of a user, the matching users are shown. You can select one or several users as recipients. To remove a user, click the x next to the user's name.
4. Select the type of notification from the *Select nature* drop-down list. The nature of the notification determines the icon which is shown in the delivered notification. There are four natures:
  - **Message:** blue icon with an envelope
  - **Info:** green icon with an *i*
  - **Alert:** yellow icon with an exclamation mark
  - **Alarm:** red icon with an exclamation mark
5. Enter the notification text in the text field below.
6. Click the *Send notification* button. A success message is displayed at the bottom of the window if the notification has been sent.

## B.5 Activities

Activities are operations which can be carried out for the objects in ConSol CM. These can be:

- **Cases:**  
[Workflow activities](#)
- **Contacts or companies:**  
[Contact activities](#)
- **Resources:**  
[Resource activities](#)
- **Result sets of a Detailed Search:**  
[Search activities](#)

The workflow activities are part of the process definition. The contact, resource, and search activities (actions) are part of the ConSol CM Action Framework. All the activities are defined by the CM administrator. You can perform activities provided that you have the required permissions.

The available activities are displayed in the upper right corner of the Web Client. They always refer to the object displayed in the [main working area](#).



All activities are customized and depend on the individual configuration of your CM system.

## B.5.1 Forms for activities

Activities can have forms, which are called **Activity Control Forms** for cases and **activity forms** for contacts, resources, and results of case, contact, and resource searches. When you click such an activity, the respective form is opened and you have to fill it in before proceeding.

A common use case of forms is to enter certain data for the object on the page, i.e., the current contact or resource, or the results of the current search.

The example below shows an activity form for a company. Upon clicking the activity (1), a form is opened on the top of the page. You fill out the form and click *Save and continue*. The company is then updated with the data you provided (2).

The figure illustrates the process of updating a company's service contract data through an activity form. The top part shows the form being filled out, and the bottom part shows the successful update and the updated data reflected in the company details.

Figure 32: Activity form on a company page

Forms can be prefilled either with default values or with values from the current object. It is also possible that the fields are empty when opening the form. Required fields have an asterisk.

**i** Depending on the individual configuration of your CM system, forms can also be used to manipulate other objects. For example, you can fill out a form on a resource page to create a case based on your input.

## B.5.2 Workflow activities

Workflow activities allow you to move the current case through the business process. They depend on the current position of the case in the process.

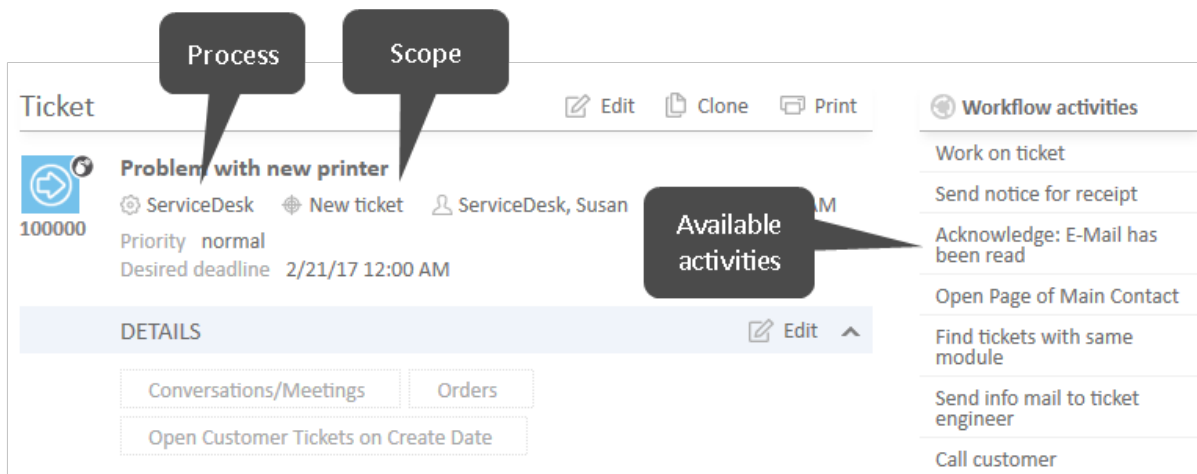


Figure 33: *Workflow activities*

Examples for workflow activities are:

- Work on case
- Put case on hold
- Pass case to another team
- Close case

Please see [Performing workflow activities](#) for further information.

### B.5.3 Contact activities

Contact activities allow you to perform certain actions for the current contact. They depend on the customer group which the current contact (company or person) belongs to. Contact activities are displayed in the Web Client if the conditions for their execution are met. You can perform a contact activity at any time.

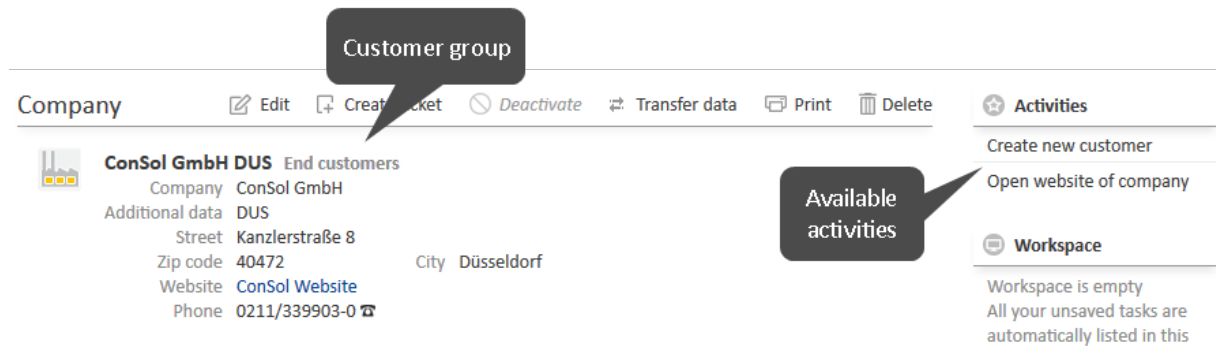


Figure 34: Contact activities (here for a company)

Examples for contact activities are:

- Create new case for the person
- Open the company's website
- Load contact data from an external source

Please see [Performing contact activities](#) for further information.



## B.5.4 Resource activities

Resource activities allow you to perform certain actions for the current resource. They depend on the resource type which the current resource belongs to. Resource activities are displayed in the Web Client if the conditions for their execution are met. You can perform a resource activity at any time.

The screenshot displays the 'Resource' page for an 'HP Printer: 4712'. The interface includes a header with 'Resource' and action buttons: 'Edit', 'Deactivate', and 'Delete'. A callout box labeled 'Resource type' points to the printer icon. The main content area shows the printer's details: 'Printers > HP\_Printer', 'Internal | Created: 7/10/15 12:16 PM', 'Name: My newer HP printer', 'Inventory number: 4712', 'Location: In my office', 'Flexible printer list: 20', 'Next maintenance at: 4/6/16', and 'IP address: 123.123.123.123'. A callout box labeled 'Available activities' points to the 'Activities' section on the right. The 'Activities' section lists 'Create maintenance ticket for HP printer'. The 'Workspace' section indicates 'Workspace is empty' and 'All your unsaved tasks are automatically listed in this workspace.'

Figure 35: *Resource activities*

Examples for resource activities are:

- Create new case for the resource
- Create a new contact who is related to the resource
- Update some resource data

Please see [Performing resource activities](#) for further information.

## B.5.5 Search activities

Search activities allow you to perform certain actions for the current set of search results. The set of search results includes either cases, or contacts of a specific customer group, or resources of a specific resource type. Search activities become available when you carried out a [Detailed Search](#) and clicked the tab with the desired objects.

When you carry out a search activity, it usually affects several objects at once, e.g., all the results displayed on the current page of the result table and whose checkboxes have been selected. This is the main difference between search activities and workflow, contact, and resource activities, which - in most cases - affect only one object.

The screenshot shows the 'Search' interface. At the top, there's a 'Search criteria' section with a date filter set to '1/10/17' and a 'Search' button. Below this, there are tabs for 'Tickets' (selected) and 'End customers (Contact)'. The 'View as' section shows 'List' and 'Grid' options. The 'Search results (3)' table contains three rows of data. To the right, a sidebar lists 'Activities', 'Workspace', and 'Favorites'. A callout bubble points to the 'Tickets' tab, stating 'Selected tab = result set'. Another callout bubble points to the 'Activities' section, stating 'Available activities'.

Search results (3)																
<table border="1"> <thead> <tr> <th><input checked="" type="checkbox"/></th> <th>Name</th> <th>Subject</th> <th>Main Customer</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>100001</td> <td>Test SpecTasks</td> <td>Mr Luke Skywalker</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>100000</td> <td>Problem with new printer</td> <td>Mr Luke Skywalker</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>100002</td> <td>Layout issues when printing</td> <td>Mr Luke Skywalker</td> </tr> </tbody> </table>	<input checked="" type="checkbox"/>	Name	Subject	Main Customer	<input checked="" type="checkbox"/>	100001	Test SpecTasks	Mr Luke Skywalker	<input checked="" type="checkbox"/>	100000	Problem with new printer	Mr Luke Skywalker	<input checked="" type="checkbox"/>	100002	Layout issues when printing	Mr Luke Skywalker
<input checked="" type="checkbox"/>	Name	Subject	Main Customer													
<input checked="" type="checkbox"/>	100001	Test SpecTasks	Mr Luke Skywalker													
<input checked="" type="checkbox"/>	100000	Problem with new printer	Mr Luke Skywalker													
<input checked="" type="checkbox"/>	100002	Layout issues when printing	Mr Luke Skywalker													

Figure 36: Search activities (here for a set of cases)

Examples for search activities are:

- **Cases:**  
Assign all the displayed cases to a certain user.
- **Contacts:**  
Update the data of all the displayed contacts by loading data from an external source.
- **Resources:**  
Set a maintenance date of all the displayed resources.

Please see [Performing search activities](#) for further information.

## B.6 Permissions

This chapter discusses the following:

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B.6.4 Visibility of resources .....	79

## B.6.1 Visibility of cases

Your permissions determine if you can see a certain case in your ConSol CM system. These permissions are given to you by your CM administrator via roles. You cannot change your roles or permissions.

Two permissions affect if cases are visible to you in your CM system:

- You need at least read permission for the **process** in which the case is currently in.
- You need at least read permission for the **customer group** to which the main contact of the case belongs.

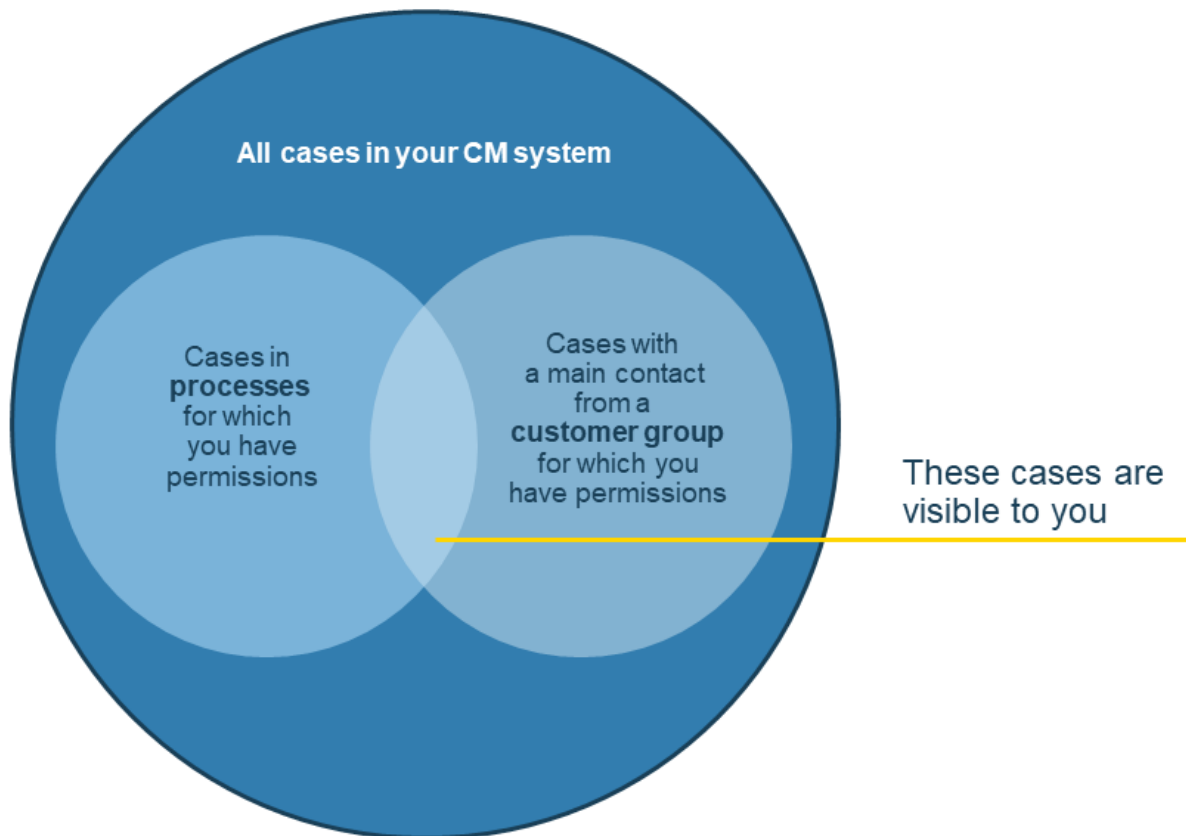


Figure 37: Which cases are visible to you?

If you have these two necessary permissions, you can access the case in several ways:

- Using the different kinds of the [search functions](#):
  - Quick Search
  - Detailed Search
- Selecting the case in the *Cases* section of a contact page
- Selecting the case in the Related cases section of another case, a contact page, or resource page.
- Selecting the case from the [case list](#) within one of the available views, but only if the case matches the criteria of the currently chosen view (see [Technical background](#)). The different

kinds of views that exist within your CM system are available to you according to your roles. A view needs to be assigned to at least one of your roles in order for you to be able to choose it. The assignment of views to roles is done by your CM administrator.



#### Visibility of case relations

If case A has got relations to other cases B and C, which you cannot see due to lack of permissions for the process or the customer group of case B and case C, the related cases are not shown to you in case A.

#### B.6.1.1 Technical background

Your permissions determine if you can see a certain case in your ConSol CM system. Two permissions affect if cases are visible to you in your CM system:

- You need at least read permission for the **process** in which the case is currently in.
- You need at least read permission for the **customer group** to which the main contact of the case belongs.

#### Example:

There are ten cases in the process *Sales*. Four cases belong to customer group *End customers* and six cases to customer group *Reseller*. You have permissions for this process and permissions for customer group *Reseller*. Therefore you can see six cases.

## B.6.2 Cases in the case list

The case list shows you cases which correspond with the current [view](#). The view limits the cases which are shown in the case list to those cases matching specific criteria. This is why cases in the case list only represent a **subset** of all cases which are currently present in your CM system (and also of the cases which are accessible to you due to your permissions).

- **Precondition for seeing cases in the case list: View**

The [view](#) selected in the case list determines which cases (which are accessible to you due to your permissions) are displayed in the case list. You can decide which view you want to choose, i.e., which cases shall be shown in the case list in this moment. Which kinds of views are available is determined by your CM administrator.

- **Precondition for seeing cases within a view: Filter**

The case list [filter](#) enables you to reduce the number of cases in the case list. You can choose criteria a case needs to match in order to be shown in the **currently chosen view**.

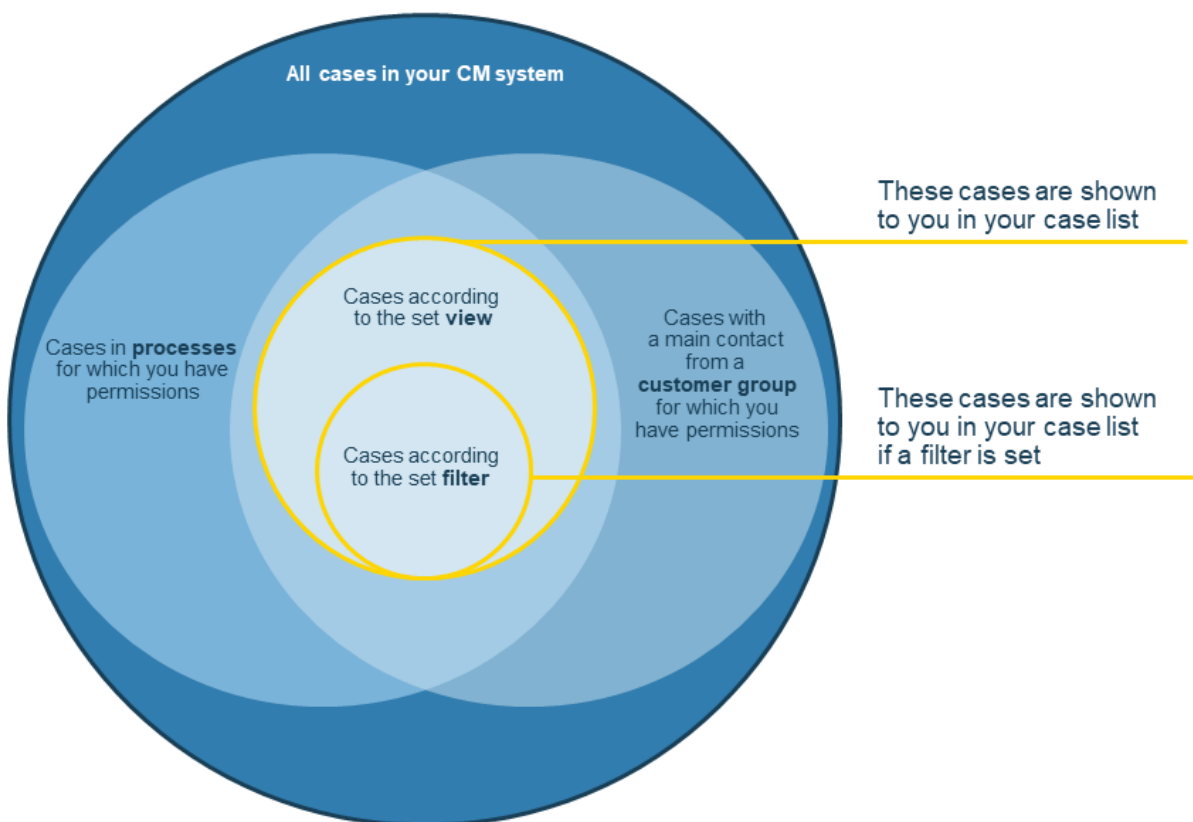


Figure 38: Cases shown in the case list

### B.6.2.1 Technical background

Which cases are shown to you in the case list depends on your permissions and the currently chosen view. From a technical point of view, the following factors are crucial:

- **Your permissions:**

You need at least read permission for the **process** in which the case is currently in, and you need at least read permission for the **customer group** to which the main contact of the case belongs.

- **The view:**

The view defines the **processes** and **scopes** the cases in this view are from. A view can also contain cases from multiple processes and scopes. If this is the case, you need read permissions for all processes which are important for this view. If you do not have the necessary permissions, you are not able to see all cases in this view.

**Example:**

There are ten cases in the CM system, four cases in the process *Products* and six in the process *Sales*. All cases belong to customer group *Reseller*. You have permissions for both processes and permissions for the customer group. Therefore you can see all ten cases in the case list.

Both processes contain the scopes *In Progress* and *Closed*. The view *Active cases* contains cases from the scope *In Progress* in both processes. Thus the display in the case list is limited to active cases from both scopes.



User who should see the same cases in the case list need to have similar permissions and the same views.

### B.6.3 Visibility of contacts

You need at least read permissions for the customer group a contact belongs to in order to be able to see him, e.g., find the contact via the search functions or see the contact in cases as an additional contact. The permissions are given to you by your CM administrator via your roles. You have no influence on your roles.

When a main contact of a case belongs to a customer group for which you have read permission, but there are also additional contacts from customer groups that you do not have read permissions for, you will be able to see the case, but its additional contacts are not shown to you.

### B.6.4 Visibility of resources

You need at least read permissions for the resource type which a resource belongs to in order to be able to see it, e.g., find the resource via the search functions or see relations to the resource in cases and on contact pages. The permissions are given to you by your CM administrator via your roles. You have no influence on your roles.

## B.7 User profile

This chapter describes the features of the user profile and the related actions.

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## B.7.1 Accessing the user profile

The user profile contains your personal settings, representations, and time bookings. You access the user profile by clicking the name of the currently logged in user (above the main menu, next to *Logged in*):

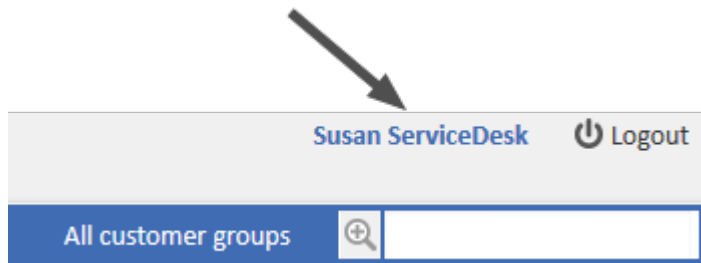


Figure 39: Link to the user profile

## B.7.2 Structure of the user profile

The user profile can have up to five sections:

- [Password change](#)  
Change the password of your user account (not visible in case you log in via LDAP or Single Sign-On).
- [Representation](#)  
Set up representations.
- [General settings](#)  
Set the view criteria, default customer group, default process, and enable or disable CM/Doc.
- [Time booking](#)  
Add time bookings and view your time booking report.
- [Downloads](#)  
Download the installers for CM/Phone and CM/Doc.

## B.7.3 Password change

The *Password change* section allows you to change your password. For security reasons the password is displayed as dots.

### B.7.3.1 Changing the password

Please proceed as follows to change your password:

1. Enter your current password in the field *Old Password*.
2. Enter your new password in the two fields below.
3. Click *Change password*.




If you log in to the Web Client via LDAP or Single Sign-On, you cannot change your password in the Web Client. In this case, the *Password change* section is not displayed.

## B.7.4 Representation

### B.7.4.1 About representations

Representations are temporary replacements. You can choose a colleague who should represent you, and, in some cases, you can also define yourself as a representation for a colleague. This can be useful for example during the time of your vacation. Representations have the following effects:

- The representing user can receive a **copy of the emails** which are sent from the CM system to the represented user's email address.

 Please note that there are two different scenarios for sending emails and that the CM system behavior concerning sending representation mails might differ for the two scenarios. In both scenarios, it depends on the specific configuration of the CM system which users receive a copy of the email.

- **A user writes an email using the rich text editor**

The default behavior is that the representing user does **not** receive a copy of the email.

If the system is configured to forward this kind of emails, the representation functionality checks if a representation rule is active for the respective email address. If a representation rule is active for a certain email address, an email sent from the rich text editor is sent to this email address as well as to the representing user of the person with this email address. Please consider this if people are registered both as persons and users in your system!

- **An email is sent automatically from the CM system**


It might be implemented that the representing user of the user with the respective email address gets a copy, but this is not mandatory.

Please ask your ConSol CM administrator about the specific behavior of your CM system!

- **Another option is added to the case list** enabling the representing user to view the cases of the represented user in the case list as if they were his cases. But the representing user can still only see the cases which are accessible to him due to his permissions. If the representing user has no read permissions for a certain process, he still cannot see those cases, even if he is representing a user with read permissions for this process (see [Permissions](#)). This is why only users with similar roles (i.e., similar permissions) should be representing each other.

Representations **do not have** the following effects:

- When you are representing someone, you do not get his views in addition to your own views. This means that you still have the same number of views, but you can **change** these views in order to look at them through the eyes of the user you are representing (e.g., seeing the cases of the represented user in the case list *Own Cases*).
- When you are representing someone, you do not get the permissions of the user you are representing in addition to your own permissions.
- When you edit cases, contacts, or resources, your changes are always saved in the history under your own name. Even when you are representing someone, you are still acting under your own name, you do not take on the name of the represented user.

 When a new representation is set up or removed, both affected users receive an email notification informing them about the representation.


#### B.7.4.2 Preconditions for setting up a representation

- In order to **set yourself up as a representation** for a colleague, you need the permission *Configure representation*. Your roles, assigned to you by your CM administrator, determine if you have got this permission.
- Every user can **set up a colleague as a representation for himself**. You can only choose users with whom you have **at least one role in common** for this purpose.

#### B.7.4.3 Representing a colleague

If someone else set you as his representation, you will see a message informing you about this fact after logging in to the Web Client. The message contains a link to your user profile page where you can end the representation.

If you have the permission *Configure representation*, you can set up yourself as a representation for a colleague. Choose the user who you want to represent from the drop-down list *Colleagues represented by me*. To end the representation, click the little arrow next to the name of the user you are representing and click *Cancel the representation*. In case you represent multiple users, you can end all representations by clicking *Cancel all*.

 Your name is displayed under *Colleagues representing me* on the user profile page of the user you chose. This user can end the representation any time in his user profile.

When you are representing a colleague, your [case list](#) shows the additional drop-down menu *Assignee*. If you choose the user who you are representing from this menu, the representation icon appears next to the drop-down menu *View*. The icon indicates that you are currently looking at this view from the other user's perspective.

#### Example:

If Susan ServiceDesk represents Sarah ServiceDesk and chooses Sarah ServiceDesk from the drop-down menu *Assignee* (after clicking the *Advanced settings* button), Susan ServiceDesk sees the currently chosen view as if she were Sarah ServiceDesk. For example, in the case list group *Own cases* she now sees the cases that are assigned to Sarah ServiceDesk. When Susan ServiceDesk chooses herself from the drop-down menu *Assignee*, she sees her own cases (cases which are assigned to her) in the case list group *Own cases*.

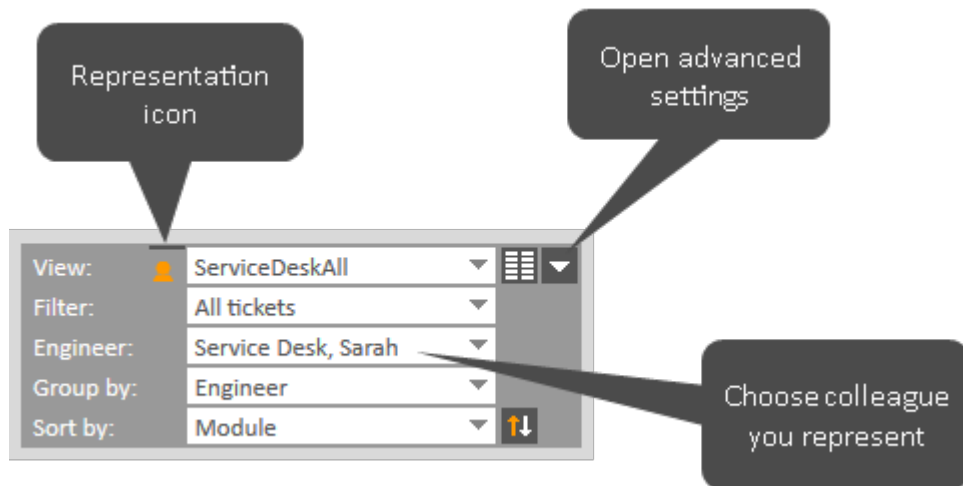


Figure 40: Susan ServiceDesk - Viewing the cases of Sarah ServiceDesk

#### B.7.4.4 Being represented by a colleague

Every user can set up a representation for himself. You do not need special permissions in order to set up a representation for yourself. Just choose the user who should represent you from the drop-down list *Colleagues representing me*. To end the representation, click the little arrow next to the name of the user representing you and click *Cancel the representation*. In case there are multiple users representing you, you can end all representations by clicking *Cancel all*.

**i** Your name is displayed under *Colleagues represented by me* on the user profile page of the user you chose for representing you. The representing user can end the representation any time in his user profile.

If another user represents you, you see a message informing you about the representation after logging in to the Web Client. The message contains a link to your user profile page where you can end the representation.

There is a representation configured for your account. Click [here](#) to configure this.



Figure 41: Sarah ServiceDesk - Notification that she is currently represented by a colleague

## B.7.5 General settings

The *General settings* section includes settings regarding [View criteria](#), [Default customer group](#), [Default process](#), and [Document generation via CM/Doc](#).

### B.7.5.1 View criteria

The view criteria allow you to configure whether one or more views should be limited by certain criteria. This means that the case list will show only cases that match the defined view criteria in these views, please see [Changing view criteria](#) for further information.

### B.7.5.2 Default customer group

The default customer group determines which customer group tab is initially selected when creating or choosing a contact. You can still select the other customer groups though. This is the main difference between setting the default customer group and choosing a customer group from the [customer group filter](#), which hides the other customer groups.

To set a default customer group, choose the desired customer group from the drop-down list *Default Customer Group*. If you do not want to set a default customer group, select *Choose One*.

### B.7.5.3 Default process

The default process determines which process is preselected when you create a new case. You need to have *Create Case* permissions for more than one process to be able to choose a default process. If you do not have this permission for multiple processes, there will be no drop-down menu for you to choose from, but rather the process for which you have *Create Case* permissions will be displayed in this section. You can choose the desired process from the drop-down list *Default process*. If you do not want to set a default process, select *Choose One*.

### B.7.5.4 Document generation via CM/Doc

If CM/Doc is enabled in your CM system, you can enable or disable CM/Doc in your user profile. If you select *Enabled* in this section, the *Document* tab is displayed in the case history section. If you select *Disabled*, the *Document* tab is hidden and you cannot use CM/Doc.

## B.7.6 Time booking

**i** Whether the *Time booking* section is shown in your Web Client depends on the individual configuration of your CM system.

The Time booking section consists of two parts:

- **Add Time Booking (1)**  
Enables you to add time bookings.
- **Time booking report (2)**  
Shows your time bookings.

**TIME BOOKING**

**Add Time Booking**

Today's time bookings 00:00

Ticket name or subject

Display All tickets  2/21/17  Day [Week](#) [Month](#)

**1** Available ticket

- 100392 : How to add a printer
- 100368 : Printer does not print properly
- 100312 : Complaint #42 - please take care asap!!!
- 100269 : Kundenservice Anfrage
- 100554 : Big problem with Big Data
- 100245 : Printer does not work

Starting from 2/20/17  hh:mm Duration

or Choose One

Project Choose One  Comment

**Save time booking** **Cancel** **New ticket search**

Day 2/20/17

Time period [Day](#) [Week](#) [Month](#)

**2**

Feb 20, 2017				◀ Today ▶
Time	Duration	Project	Ticket	Comment
3:50 PM - 3:51 PM	00:01		#100269 Kundenservice Anfrage	
Total bookings on this day: 00:01				

Figure 42: Time booking and time booking report in the user profile

### B.7.6.1 About time bookings

With time booking, working hours can be booked and reports of those working hours help gain an overview of time spent on certain tasks, e.g. on a certain project.

There are two types of time bookings:

- **Manual time bookings**  
You can perform manual time bookings. With manual time bookings, working hours are always booked on projects, i.e. for each time you book on a case you have to select the project the time should be booked on.  
The bookings are listed in the report on the user profile page.

- i** To be able to book time on projects, the following preconditions have to be met:
- Your CM administrator created the project in your CM system and assigned it to at least one process.
  - The case you want to book time to is currently in a process to which the project is assigned.

**There are two locations where you can add a time booking manually:**

- The *Time booking* section in the user profile: [Adding a time booking](#)
- The *Time booking* tab in the *History* section of the case: [Adding a time booking within a case](#)

- i** Time booking in the user profile and time booking within cases can be disabled separately by your CM administrator. Therefore, it is possible that time booking in your Web Client is not possible in one or both of the locations.

- **Automatic time bookings**

Automatic time booking can be activated in a CM system by the CM administrator. If it is activated, times are booked automatically on cases (not on projects!) when you work on them. You do not have to book the working hours yourself.

The bookings are listed in the report on the user profile page.

### B.7.6.2 Adding a time booking

To enter a new time booking click the *Add* button in the *Time booking* section. Now, you have to select the case which you want to book the time on. There are two ways to do so:

- Select a case in the *Case name or subject* field. Start typing the case number or subject and choose one of the suggestions provided by the Autocomplete Search.

- i** Only cases on which you can book time due to your permissions are displayed. If a case changed to another process after you worked on it and you lack permissions for this new process, the case is not displayed.

If you want to select another case, you have to click the *New case search* button first in order to empty the field.

- Select a case from the *Available cases* list below. In the *Display* field, you can choose to see:
  - **All cases**  
Cases you worked on and cases assigned to you.
  - **Cases worked on**  
Cases you worked on during the time frame defined by the date you pick in the date picker and the period you choose (*Day*, *Week*, or *Month* containing the date). In this case "worked on" means that you have carried out one of the following actions for the case: added a comment, entered or changed data, executed a workflow activity, added a time booking, added or removed an additional assignee, sent an email to or from the case.
  - **Currently assigned cases**  
Cases to which you are assigned as the case assignee or an additional assignee.



**i** The case selection might show you cases which you cannot book time on, e.g., because the case you worked on has been moved to another process for which you lack permissions. If you do not have permissions to book time on this case, you will get a message in the Web Client and your time booking will not be saved.

The case is displayed in the *Case name or subject* field.

Now you have to fill out the duration of the time booking. There are two ways to do so:

- **Enter the duration manually:**

Select the date from the *Starting from* field, enter the starting time (optional), and enter the duration.

**i Data entry formats for the field *Duration***

**Proper** data entry formats for the field *Duration*:

- Plain numbers are automatically interpreted as minutes (e.g., 20 is interpreted as 20 minutes and 120 as 2 hours).
- Minutes can also be indicated by “m” or “min” (e.g., 20 m or 20 min).
- Hours are indicated by “h” (e.g., 2 h).
- The format 01:05 (one hour and five minutes) or 00:25 (25 minutes) is also possible.

**Improper** data entry formats for the field *Duration*:

- Combinations of hours and minutes (e.g., 2 h 25 min is not possible).
- Decimal numbers or fractions are not possible (e.g., 1,5 h or 1.5 h is not possible).

- **Choose an action:**

Select the action from the *or* field (below the *Starting from* field). The menu might show you, for example, the duration since you logged in (action *Login*) or since you added the last time booking (action *Last booking*). The date, time, and duration fields are filled out automatically with the respective time period.


**i** If you cannot see the drop-down menu for action selection, it has been deactivated by your CM administrator. In this case, you need to enter the starting time and duration manually.

- Now, you have to choose a project from the drop-down list *Project*. You can enter a comment (optional).

**i** It is not possible to change or delete a submitted time booking, but you can correct an incorrect time booking by a correction booking. To do so, you create a normal time booking and add a “-” (minus) in front of the duration of the booking. The correction booking subtracts the booked amount of time from the overall time booked on the regarding day.

### B.7.6.3 About the time booking report

The time booking report shows you all time bookings you added on your user profile or within cases. You can select the day using the date picker and the time period (*Day*, *Week*, or *Month*). If you display the day, you see the details of each booking (time, duration, project, case, comment) and the sum of the bookings. In the week and month view, you see the sum of the bookings of the week or month containing the day picked with the date picker.

 When you click on a date in the month or week view, you immediately jump to the *Day* mode for this day and see all the details of this date's bookings.

## B.7.7 Downloads

The *Downloads* section includes the installers for the ConSol CM add-ons CM/Doc (see [Document templates \(CM/Doc\)](#)) and CM/Phone. You can download the desired installer by clicking the name of the add-on in the *Download* column. The *Description* column shows a short description of the add-on.

The installers are available for Windows operating systems.

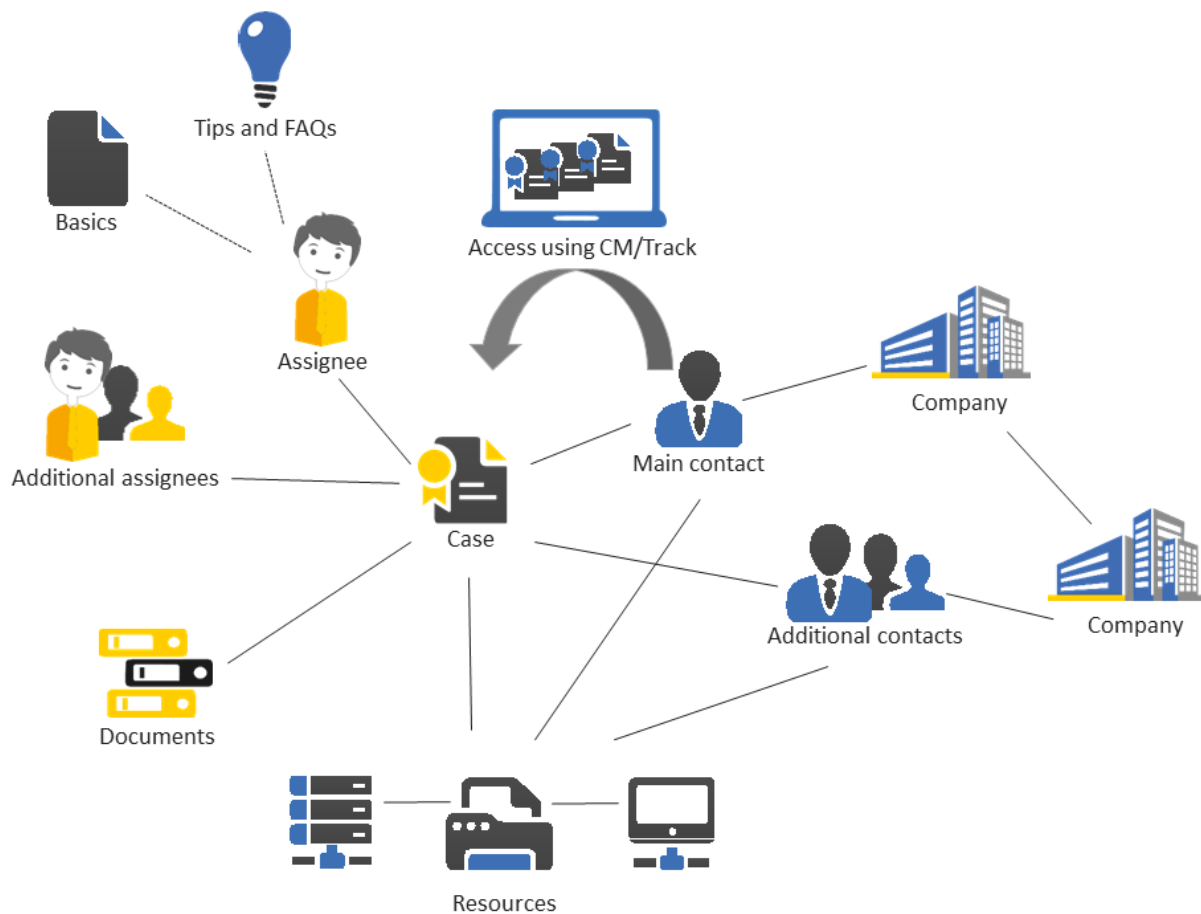
### B.7.8 Active sessions

The *Active sessions* section shows a list of all your open sessions, including your current session.

Normally, only one session should be displayed in the list. Nevertheless, it can happen that you have several open sessions, for example if you accidentally close your browser while working with the Web Client, or if you log in to the Web Client in more than one browser. You consume one license for each open session.

You can end the other active sessions by clicking the X icon in the row of the respective session, or close all active sessions except for the current one by clicking the *End other Web Client sessions* button below the table.

## C - Cases



This section provides you with all the information you need for working with cases:

Basic knowledge about the structure of a case, view settings for cases, and the meaning of the most important terms:

- [Basic knowledge about cases](#)

All information about the structure and usage of the case list:

- [Case list](#)

All information about working with cases, from creating cases to using case relations, communication features, and performing workflow activities:

- [Working with cases](#)

## C.1 Basic knowledge about cases

This chapter discusses the following:

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### C.1.1 Structure of a case

The case is the request of the contact which the user works on. This can be an incident, a service case, or any other request. For each request, a case is created. The users work on the case, which means that they carry out the necessary steps as defined in the business process. The progress, including internal and external communication, is documented in the case. The business process can involve several users and different teams. When the request is solved, the case is closed. Closed cases are not lost, but they represent a powerful archive and knowledge base.

A case is divided into sections. There can be up to nine different sections:

- [Header \(1\)](#)
- [Details \(2\)](#)
- [Contacts \(3\)](#)
- [Additional assignees \(4\)](#)
- [Related cases \(5\)](#)
- [Calendar \(6\)](#)
- [Related resources \(7\)](#)
- [History \(8\)](#)
- [Attachments \(9\)](#)



The availability of the sections, their order, their headlines and whether they are collapsed or expanded by default depend on the individual configuration of your CM system.

## C.1.1.1 Example

Service case Edit Clone Print

**1** **Printer problem**  
 100711 ServiceDesk Work in progress ServiceDesk, Susan 11/13/19 1:37 PM  
 Priority normal  
 Desired deadline 11/28/19 12:00 AM

**2** DETAILS Edit ^

Conversations/Meetings Orders Open Customer Tickets on Create Date

**3** **CONTACTS (1)** + Add ^

**Luke Skywalker** ▼ Reseller

**4** **ADDITIONAL ASSIGNEES (1)** + Add ^

**ServiceDesk, Susan** assigned

**5** **Supervisor**

**Holler, Konrad** ▼

**6** **RELATIONS (1)** + Add ^

**7** **referenced by**

100313 Printer still does not work ▼

**8** **CALENDAR** Refresh ▼

**RELATED RESOURCES (1)** ^

Show: **All relations** ▼

PCs	Printers
PC Desktop Relation (0) <span>+ Add</span>	HP Printer Relation (1)

**9** **HISTORY** Comment E-Mail Attachment Document Time booking ^

Show: **Communication only** ▼ Sort by: **Newest entries first** ▼

35 minutes ago

**#1 created by ServiceDesk, Susan | Action** ▼


My printer does not work.

**9** **NO ATTACHMENTS** ^

Figure 43: Case sections




### C.1.1.2 Case sections

 Please note that the different sections are always used for the purpose stated below, but the section **headline** might differ. The number in brackets next to the section headline indicates how many data entries this section contains.

Depending on your system configuration, some of the sections might be hidden and you cannot use them.

#### Header (1)

The section headline may be *Case*, *Case*, or similar. The case header is always the first of the case sections. The case icon is displayed in the left corner (see [Case icon](#)). Next to the case icon you see the case subject. Below the case subject, the basic case data is displayed, e.g., the current process, scope, assignee, and creation date. Further case data is configured by your CM administrator using case fields. The right corner contains links for editing, cloning, and printing the case (see [Updating cases](#)).

 If the case was archived, the section headline includes *(ARCHIVED)*.

#### Details (2)

The section headline is usually *Details*. This section contains additional case fields with case data. Each group has its own tab allowing you to access the case data. Click the plus icon (displayed when you hover over the group name) to expand the group. Click the minus icon to collapse it. To edit the group data, click the *Edit* link on the right (see [Editing case data](#)).

#### Contacts (3)

The section headline may be *Contact*, *Person*, or similar. This section contains [contact data](#) for the main contact and additional contacts of this case. The available fields are configured by your CM administrator using contact fields. A case always has to have exactly one main contact, who gave the reason for creating the case. It can have any number of additional contacts, but they are not mandatory. Additional contacts often have roles indicating the reason why a contact is added as an additional contact.

Both main and additional contacts show a contact icon (chosen by your CM administrator) in front of the name of the person or company. The customer group which the contact belongs to is indicated next to the contact's name. You can set the [visibility level](#) to determine how much information you want to see about each contact. Please see [Working with contacts within cases](#) for further information about contacts.

 You can also show a [relation graph](#) in this section.

#### Additional assignees (4)

The section headline is usually *Additional assignees*. This section shows the additional assignees that are attached to the case. If there are additional assignees as well as an assignee, the assignee is also shown here. The assignees' icons can feature additional elements, e.g., a little soccer ball indicating that this is the case assignee. There are further possible icons that can be attached to the icon, see [Approval processes](#). The additional assignees are grouped by their function, e.g., *Supervisor*. The func-

tion indicates the role/task of the assignee in the business process. The available functions depend on the configuration of your individual CM system. Please see [Additional assignees](#) for further information.

#### Related cases (5)

The section headline is usually *Relations*. This section shows cases which are related to the current case. It shows the case icon, name, and subject of each related case. The related cases are grouped by the kind of relation they have with the current case, e.g., *referenced by*. Please see [Case-case relations](#) for further information about the available relations. You can set the [visibility level](#) to determine how much information you want to see about each related case.

 You can also show a [relation graph](#) in this section.

#### Calendar (6)

The section headline is usually *Calendar*. This section shows the integrated calendar. It depends on the configuration of your individual CM system if the calendar feature is available. You can add an appointment or refresh the calendar using the links provided on the right. The calendar can be useful when you communicate with a contact regarding the case: You see your own availability at a glance, so you can quickly schedule a phone call with the contact. Furthermore, you can directly add it as an appointment to your own calendar.

#### Related resources (7)

The section headline is usually *Related Resources*. This section shows the resources linked to the case. Resources are objects which are managed in CM/Resource Pool. These can be IT assets, products, or any kind of object related to the business process. It depends on the configuration of your individual CM system if resources are available. You can set the [visibility level](#) to determine how much information you want to see about each related resource. Please see [Case-resource relations](#) for further information about working with resource relations.

 You can also show a [relation graph](#) in this section.

#### History (8)

The section headline is usually *History*. This section contains the case history which shows all entries and actions for this case. This can be communication like emails and comments, changes to the case data (e.g., an entry stating that a specific user changed the priority of a case including date and time of this change), or executed workflow activities. You can set the [visibility level](#) to determine how much information you want to see about each entry. In addition, you can choose which [entries should be displayed](#) and you can [sort the entries](#). The history section also contains editors for comments and emails, which you can quickly access by clicking the entry field above the history entries. On the right, you find several links which allow you to add a *Comment*, *Email*, *Attachment*, *Document* or *Time booking*. Please see [Communication](#) for further information.

#### Attachments (9)

The section headline is usually *Attachments*. This section contains all files (documents or images) which were added to the case. You can filter the attachments according to the chosen filter criteria. Please see [Attachments](#) for further information about working with attachments.

### C.1.1.3 Case icon

The case icon can have different colors, symbols, and overlays. Their usage and meaning depend on the individual configuration of your CM system. The following example illustrates this feature:

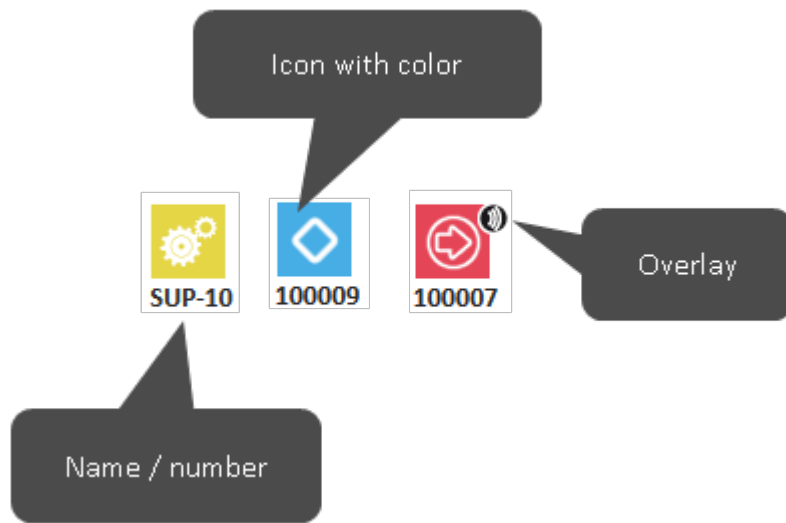


Figure 44: Case icons with different colors and symbols and an overlay

#### Colors

Usually, case icons follow a color scheme. Each color represents the value of a certain parameter in the current process. For example, for Customer Services the colors could represent the priority of a case (red = high priority, yellow = medium priority, green = normal priority) and for Sales they could represent the probability of closure (red = low, yellow = medium, green = high).

#### Symbols

The case icon always shows a symbol indicating the scope of the business process (i.e., the workflow) the case currently is in. For example, an in-box might indicate the scope *New case* and a wheel might indicate the scope *In Progress*.

#### Overlays

Overlays are little symbols which are added to the case icon after specific events happened. For example, the email overlay might indicate that a new email has been received for a case. The overlay usually disappears once you have carried out an action on the case.

## C.1.2 Display settings

This chapter discusses the following:

- [Expanding and collapsing case sections](#)
- [Visibility level](#)
- [Display options for the history section](#)

### C.1.2.1 Expanding and collapsing case sections

The case sections, except for the header, can be hidden, collapsed, or expanded. Your CM administrator can hide sections which are not relevant for your business process. You cannot use hidden sections. If a section is collapsed you only see the section heading but not the content of the section. You can expand the section by clicking the down arrow on the right. To collapse a section and hide its content, click the up arrow. Your CM administrator determines whether case sections are hidden, collapsed, or expanded by default. You can collapse and expand sections while you are working with a case but the default setting will be restored when you switch to another case.

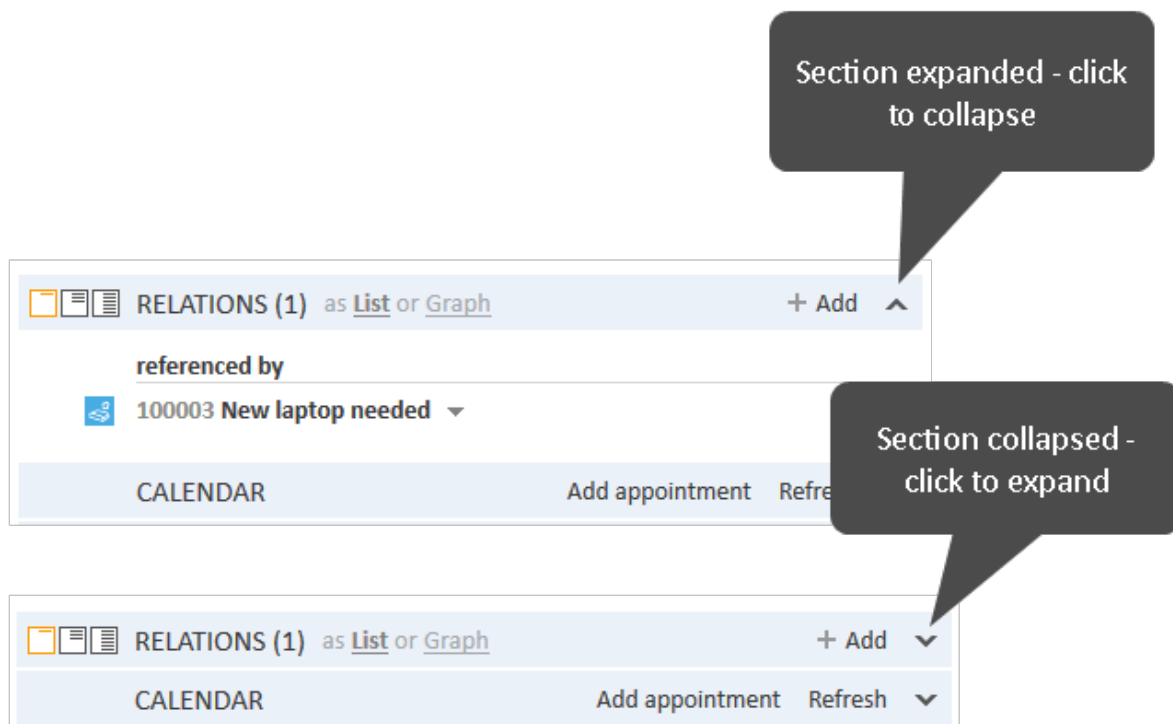


Figure 45: Expanding and collapsing case sections

### C.1.2.2 Visibility level

The visibility level determines the degree of detail of the information displayed in a case section. It can be set for several sections, e.g., the contacts section, the relations section, the related resources section and the history section.

There are three visibility levels:

- **Basic**  
Basic degree of detail

- **Extended**  
Extended degree of detail
- **Detail**  
Maximum degree of detail

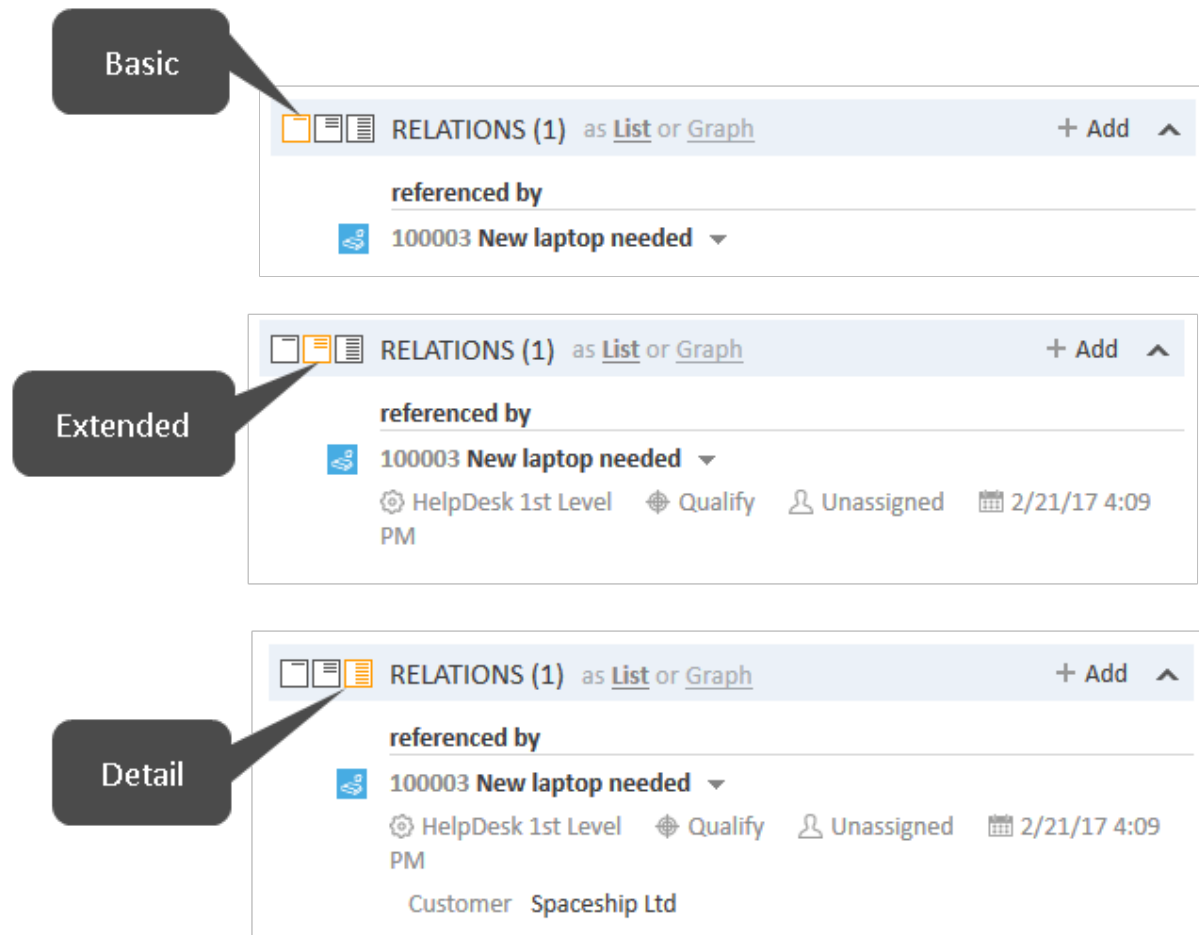


Figure 46: Buttons for visibility levels in cases

In some systems, entries of the case history might be cut off after a certain number of characters in basic and/or extended view. You can display the whole entry by clicking the little down arrow symbol or by clicking on the header of the entry. Clicking on the header again or clicking on the little up arrow below the text will minimize the entry again.

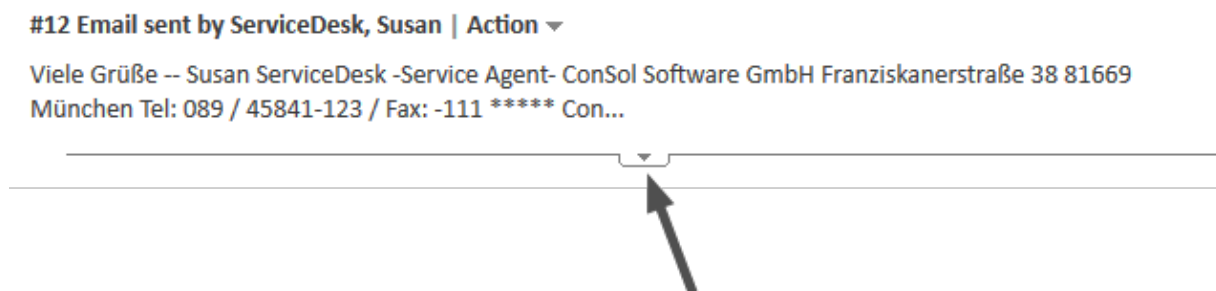



Figure 47: Expanding a history entry

### C.1.2.3 Display options for the history section

For the history section, you can adjust the displayed entries.

#### Kind of entries to be displayed

- **Communication only**  
Emails, comments, and attachments
- **All entries**  
Communication and all the other entries, e.g., changes to the case data, execution of workflow activities

 If you select the option *Communication only* the case is loaded faster.

#### Sorting of the entries

- **Latest first**  
The latest entries are displayed first.
- **Latest last**  
The latest entries are displayed at the end.
- **Assignee**  
The entries are sorted alphabetically by assignee.

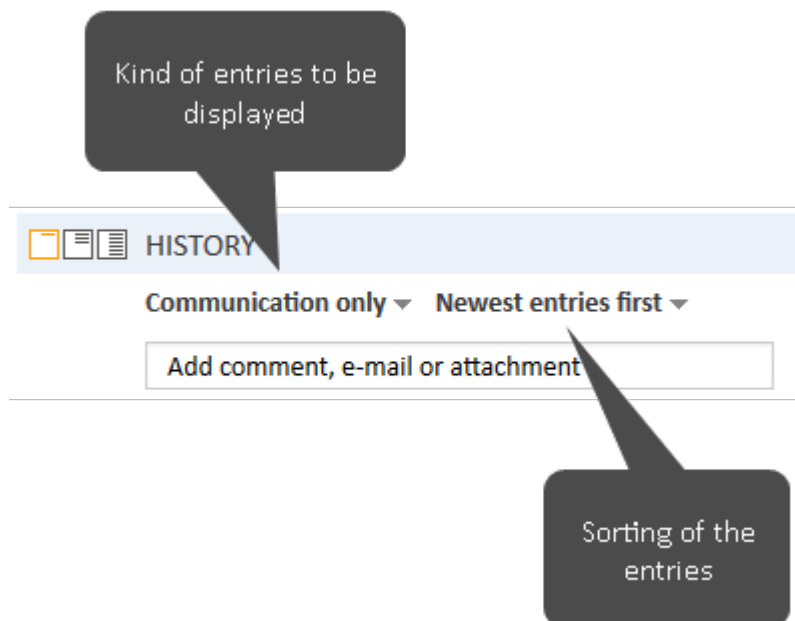


Figure 48: *Display options for the history section*

#### Expanding folded entries

On some systems, history entries might be folded, so you can only see the author and the type of entry. Click the entry to show its contents. Once unfolded, it is not possible to hide the entry's content again.

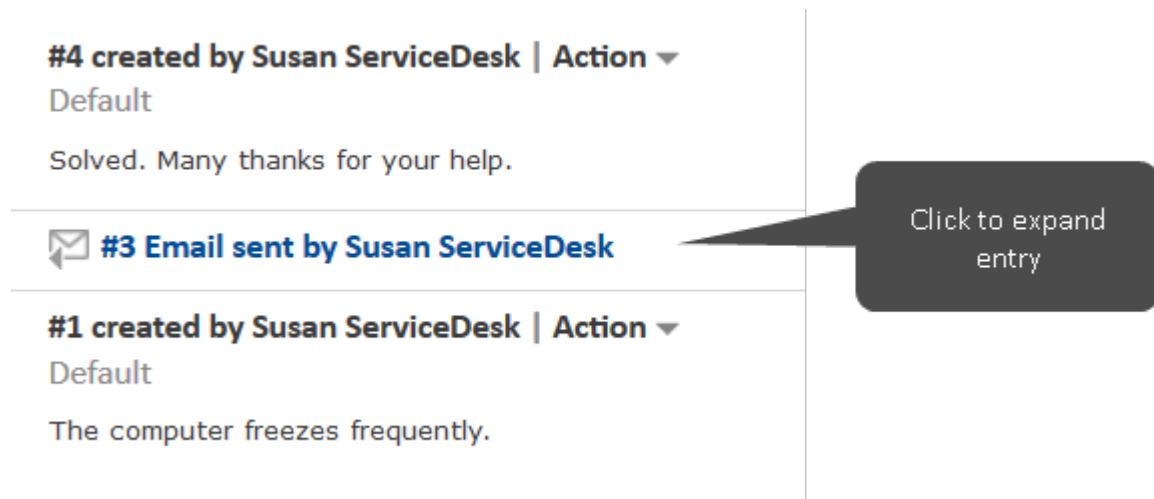



Figure 49: *Expanding a collapsed entry*

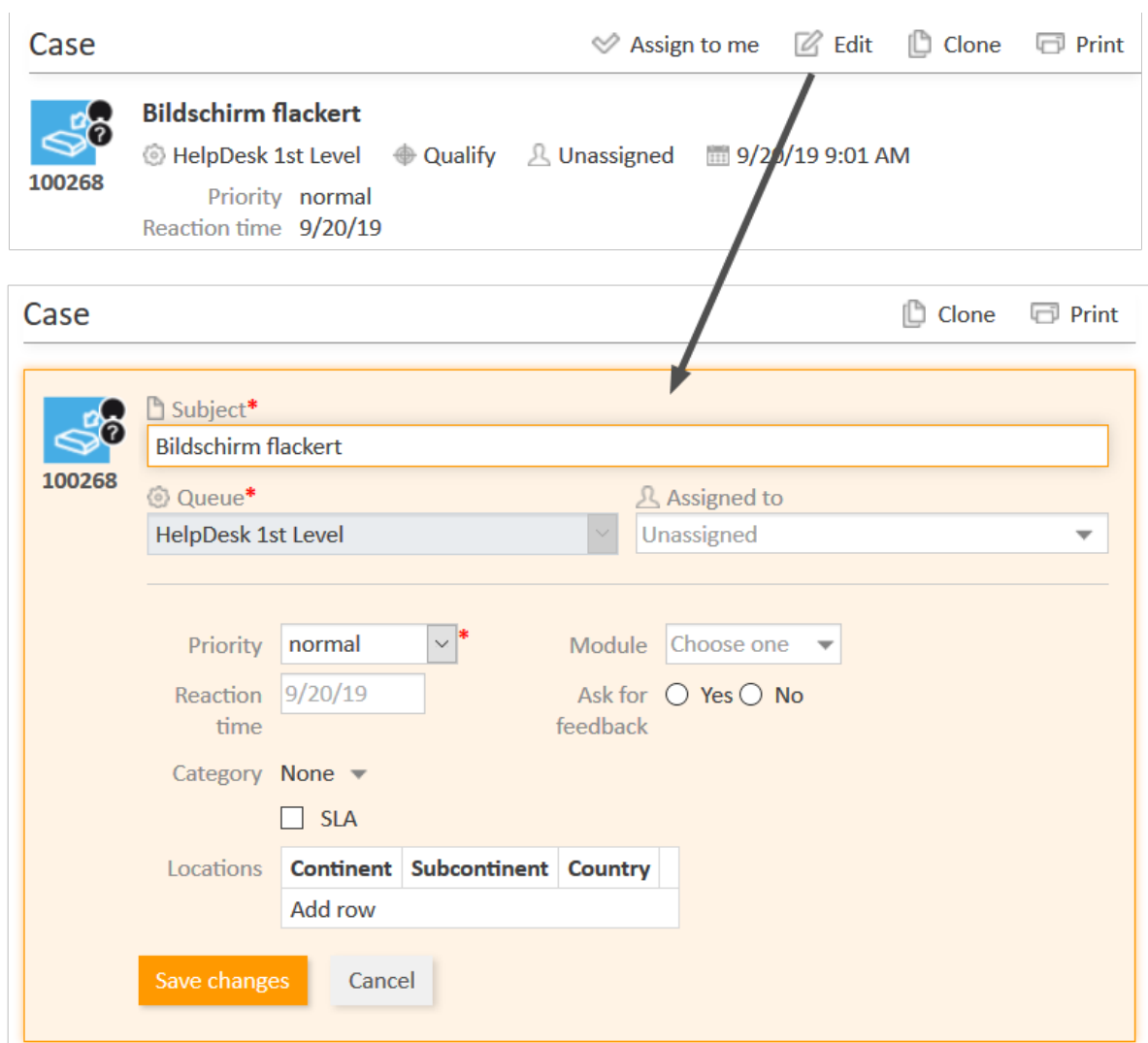
## C.1.3 Editing case data and working with cases

### C.1.3.1 Editing case data

Editing case data means editing data in the case header and the Details section of a case. Case data can be edited by every user who has **write** permission for the current process of the case. It is **not** mandatory to be the assignee of a case to be able to edit the case data.

 Even if you are not the assignee of a case, all your actions regarding the case are recorded in the case history.

When you start editing case data, the corresponding section gets a yellow background (edit mode). You cannot edit data in view mode (gray background).



The screenshot displays the 'Case' management interface in 'Edit' mode. The top bar includes 'Assign to me', 'Edit', 'Clone', and 'Print' buttons. The case header shows 'Bildschirm flackert' (Subject), 'HelpDesk 1st Level' (Queue), 'Unassigned' (Assigned to), '9/20/19 9:01 AM' (Timestamp), 'normal' (Priority), and '9/20/19' (Reaction time). The 'Details' section is highlighted with a yellow background and contains the following fields:

- Subject\***: Bildschirm flackert
- Queue\***: HelpDesk 1st Level
- Assigned to**: Unassigned
- Priority**: normal
- Reaction time**: 9/20/19
- Module**: Choose one
- Category**: None
- SLA**: ☐
- Locations**:
 

Continent	Subcontinent	Country
Add row		

At the bottom of the 'Details' section are 'Save changes' and 'Cancel' buttons. An arrow points from the 'Edit' button in the top bar to the yellow 'Edit' mode background.

Figure 50: Editing case data



### C.1.3.2 Working with a case

Working with a case means performing actions which are relevant for completing your tasks within the business process, e.g., moving the case through the business process (workflow), registering a comment after a contact call, or adding an attachment with service documents. Every user with the necessary permissions (e.g., for adding comments) can work with a case. It is **not** mandatory to be the assignee of a case to be able to work with a case.




Even if you are not the assignee of a case, all your actions regarding the case are recorded in the case history.

## C.1.4 Assignees and additional assignees

### C.1.4.1 Assignees

Usually every case has an assignee who is responsible for this case. This particular user is called the *assignee*. Each case can only have **one** assignee.

- CM systems are often configured to automatically send emails to users who just got assigned to or unassigned from a case.
- Emails with notifications regarding the case are often sent automatically to the assignee of a case, e.g., when the resubmission date is reached or a new email for the case was received.

 The cases assigned to you are shown in your case list in the [group](#) *Own cases* or if you activated the [filter](#) *Own cases*.

The assignee of a case is stated in the case header:

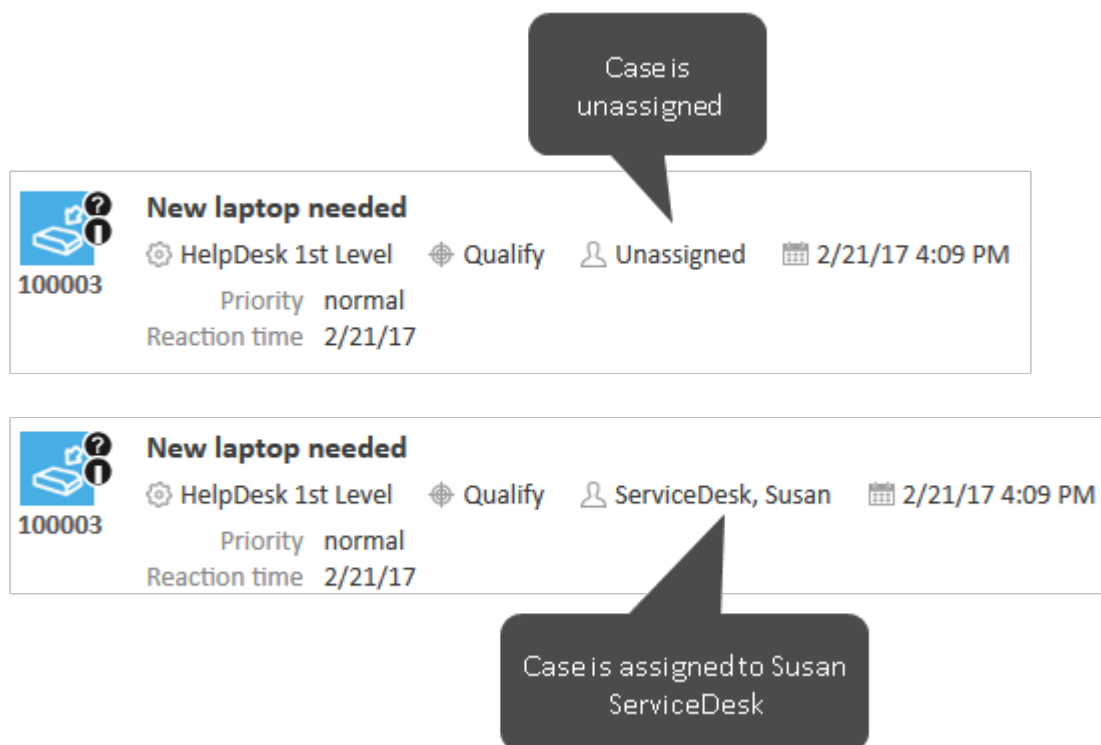



Figure 51: *Unassigned and assigned cases*

### C.1.4.2 Additional assignees

A case can have **any number** of additional assignees in addition to its assignee. Additional assignees are assignees who have a specific purpose, which depends on your business process. Usually, an additional assignee has to carry out a certain task within the process or he has to be informed about the progress of the case. For example, additional assignees can be used in [approval processes](#) to assign the case to an approver. Additional assignees have a function which indicates their role/task in the process.

The additional assignees of a case are displayed in the [additional assignees section](#). If there is at least one additional assignee, the assignee (if present) is displayed in this section as well. The assignee's icon has a little soccer ball and a red label *assigned* after his name. The additional assignees are sorted by their function and displayed below the heading corresponding to their function. If there is an [approval process](#) for this case, there can be various other symbols added to their icons.

Further effects of being the additional assignee depend on the individual configuration of your CM system. For example, additional assignees might get certain notifications regarding the case.

 The assignee of a case can also be added as an **additional assignee** for the same case. This can be the case if an assignee is responsible for a case and at the same time has to serve a specific **function**.

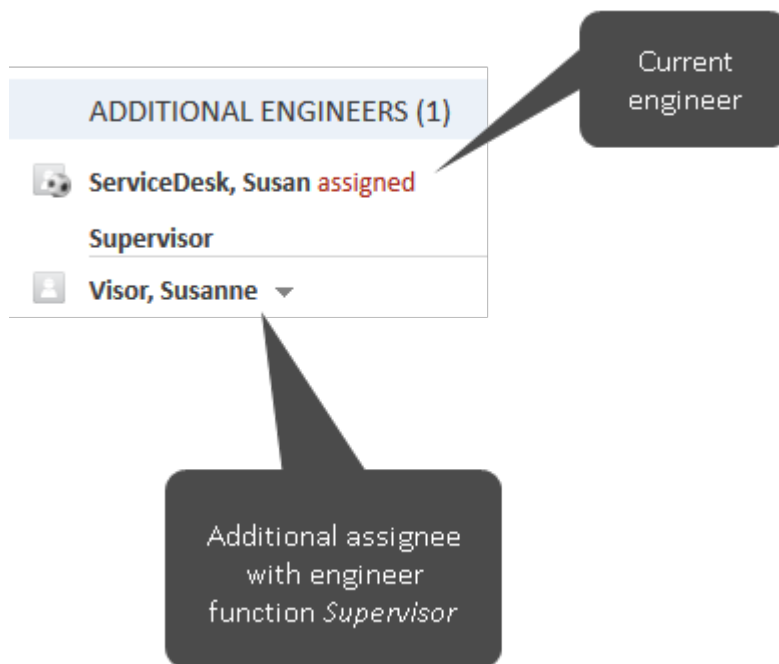


Figure 52: Additional assignees of a case

### C.1.5 Case states

A case in ConSol CM can have one of the three possible states:

- open
- closed
- archived

As soon as a case is created it is an **open** case. After a case went through the whole business process and there are no workflow activities for the case anymore, the case is a **closed** case. Closing a case can be done manually by a user or automatically by the system, e.g., after a defined waiting time after the last step of the business process.

The actions you can carry out for **open cases** are described in [Updating cases](#).

For **closed cases**, the following applies:

- They can still be found via the Quick Search, Detailed Search, and Autocomplete Search.
- They can still be duplicated and printed.
- They can no longer be edited, which means that case data cannot be changed anymore.
- They can no longer be worked with, which means that there are no workflow activities and you cannot add comments or send emails.
- They can only be reopened by performing a reopen activity or by the CM administrator.

Cases can be **archived** by the CM administrator. This means that they either disappear completely from the Web Client, or the basic case data remains but the case history, or part of the case history, is removed. In the latter case, the case header includes (*ARCHIVED*) and the history contains an entry that the case has been archived. The only possible action for an archived case is opening it in CM/Archive using the link *Open in archive application* displayed in the case header. No other actions are allowed. Archived cases only serve as a reference. It is possible to search for archived cases in the [Detailed Search](#) using the search criterion *Archived*.

The archived state is independent from the workflow. It is possible that both open and closed cases are archived.

Archived cases can be viewed in the [CM/Archive](#) application.

## C.2 Case list

This chapter discusses the following:

C.2.1 About the case list .....	110
C.2.2 Features of the case list .....	111
C.2.3 Views .....	112
C.2.4 Filters .....	114
C.2.5 Grouping .....	115
C.2.6 Sorting .....	117
C.2.7 Displaying the case list as a grid .....	117

## C.2.1 About the case list

The case list shows you certain cases at a glance. It serves as a to-do list for you and your team. You can select a view to determine which cases should be included in the case list. In addition to the list form you can also display the cases from the case list as a [grid](#) in the main working area.

The case list is located at the left side of the screen (1). It can be collapsed using the little arrow (2).

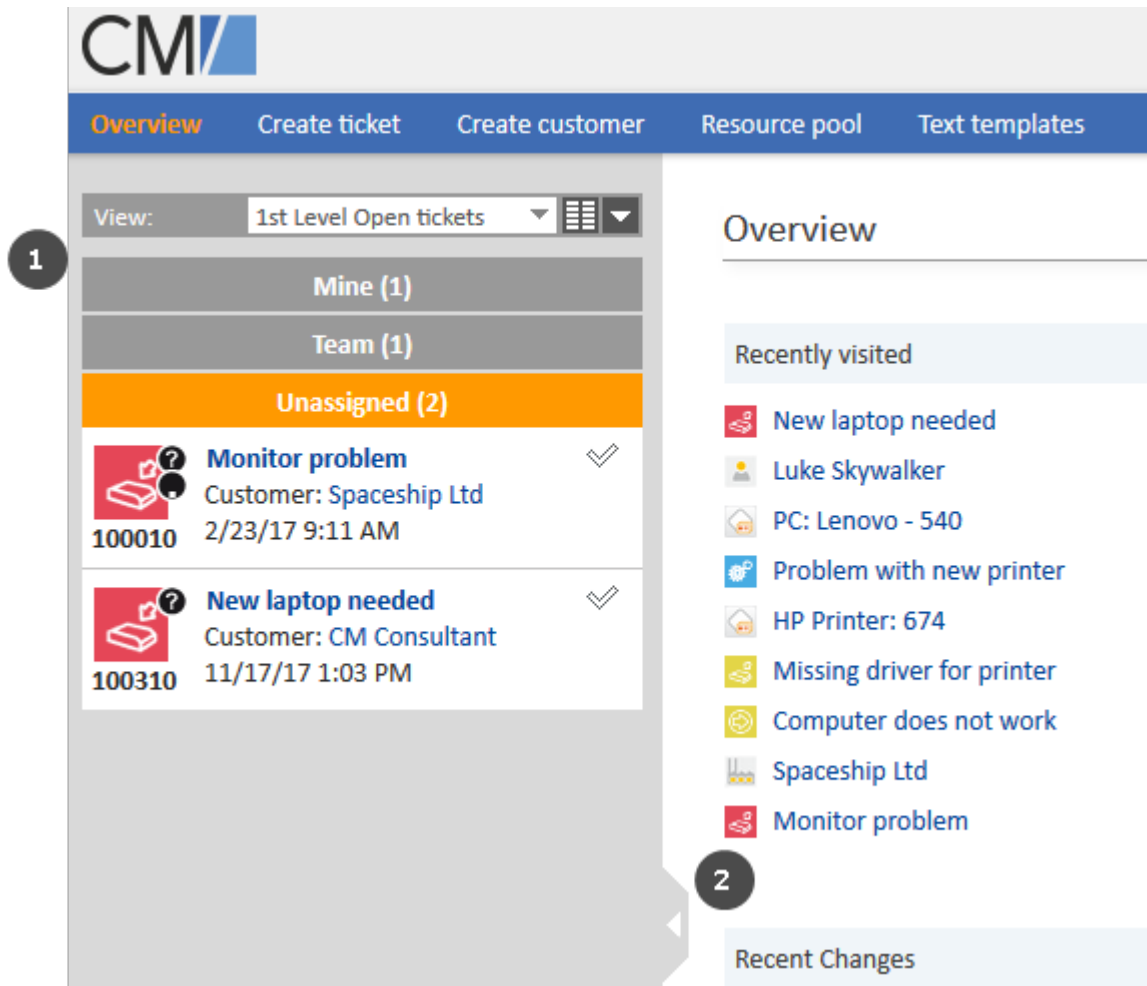


Figure 53: Position of the case list in the Web Client



The case list does not contain all the cases but a subset including only cases which are part of the selected view and for which the current user has at least read permissions. These permissions are granted for processes, not for individual cases. Therefore it can happen that a user cannot see a case anymore when it is moved to another process. Please see [Visibility of cases](#) for further information.

## C.2.2 Features of the case list

The following figure shows an example to illustrate the features of the case list.

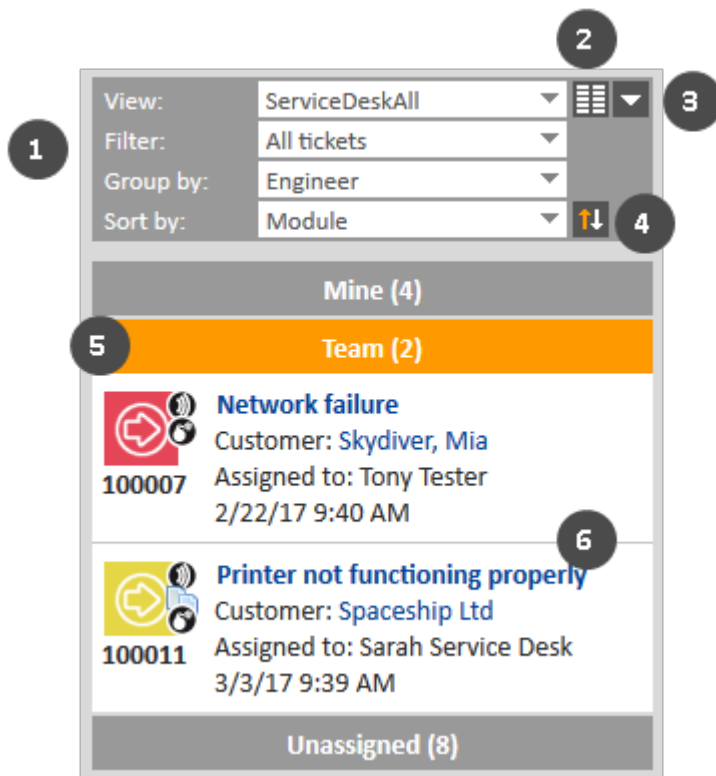


Figure 54: The case list

**i** If you cannot see all drop-down menus (1), click the *Advanced settings* button (3). The drop-down menus *Filter*, *Grouping*, and *Sorting* will then be visible.

- (1) **Drop-down menus** to choose [view](#), [filter](#), [grouping](#) and [sorting](#)
- (2) **Show as grid** button  
Shows the cases matching the criteria chosen in the drop-down menus as a [grid](#) in the main working area.
- (3) **Advanced settings** button  
Expands (and collapses) the view settings panel in order to display the drop-down menus *Filter*, *Group by*, *Sort by*, and the *Sorting order* button.
- (4) **Sorting order** button  
Switches the sorting between ascending and descending.
- (5) **Groups** for the displayed cases, see [Grouping](#).
- (6) **Cases** matching the currently chosen view and filter. The information displayed for each case depends on the selected view and grouping. You usually see the case contact and its creation date.

## C.2.3 Views

Views limit the cases which are shown in the case list to those cases matching specific view criteria. Most of the criteria are defined by your administrator during the creation of the view.


The following is always configured for a view:

- **Process**  
The view contains cases from one or several processes.
- **Scope**  
The view contains cases from one or several scopes.

In addition, a view can limit the cases to those cases which contain certain values in a **specific drop-down field**. The administrator has two options to define the values of the drop-down field for the view:

- **Static criterion**  
The value or values are preset. You cannot change them. For example, your CM administrator might configure a view which shows only cases with the priority *high*.
- **Dynamic criterion**  
You can change the values in your user profile (see [Changing view criteria](#)). For example, your CM administrator can configure a view which allows you to choose the priority (high, normal, low) yourself.


Examples for views might be *Active cases*, *Active cases with high priority*, *Inactive cases*, *All cases in the Sales process*.

 Please bear in mind that your case list only contains the cases which you are allowed to see according to your **permissions**.

### C.2.3.1 Changing view criteria

Please proceed as follows to change the dynamic view criteria:

1. Open your [user profile](#) and locate the section *View criteria* under *General Settings*.
2. Select the desired values by ticking the respective checkboxes in the drop-down list under *View criteria*. You can choose one or several values for each criterion. Depending on the individual configuration of your CM system, there might be several drop-down lists containing values for different fields.

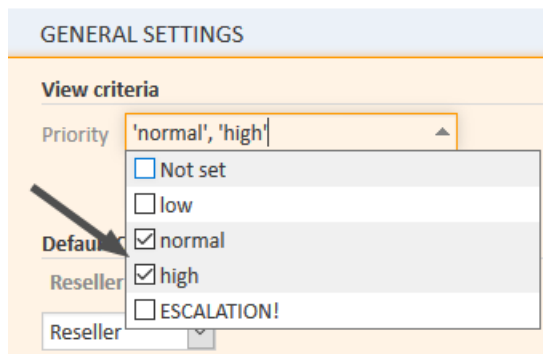
 If there are view criteria available in your user profile and you do not want to limit the display of cases for certain views, you need to activate all available checkboxes for the view criteria. If you deactivate all checkboxes, no cases are shown in the views that are affected by the view criteria.

The following rules always apply:

- deactivated checkbox = cases matching this criterion **are not** displayed
- activated checkbox = cases with the criterion **are** displayed

For example, you can determine that you want to see only cases with normal or high priority.





GENERAL SETTINGS

**View criteria**

Priority: 'normal', 'high'

- ☐ Not set
- ☐ low
- ☒ normal
- ☒ high
- ☐ ESCALATION!

Default: Reseller

Reseller

Figure 55: *View criteria in user profile*

**i** Each view can only be affected by **one** view criterion. This means that the different view criteria do not interfere with each other. Also, the view criterion only affects the views which your CM administrator configured to be affected by this criterion. Therefore, it is possible that some views still include cases which do not match the value selected for a view criterion.

A criterion in italics means that the value is deactivated.

## C.2.4 Filters

Filters limit the cases which are displayed in the case list according to the selected view. Select the desired filter from the *Filter* drop-down list. This way you can determine **which** cases should be displayed in the case list.

**The following filter criteria are available:**

- **All cases** (no filter)  
Cases are not filtered.
- **Own cases**  
The case list contains only cases assigned to you.
- **Own and unassigned cases**  
The case list contains only cases assigned to you and cases without assignee.
- **Own and referenced cases**  
The case list contains only cases assigned to you and cases for which you have been added as an additional assignee.
- **Unassigned cases**  
The case list contains only cases without assignee.

## C.2.5 Grouping

The case list can be divided into several groups. You can choose which groups you want to display using the grouping features. In this case, you do not change **which** cases are displayed in the case list, but rather **how** cases are displayed in the case list. The number of groups depends on the chosen grouping option. For example, the grouping by *Assignee* leads to three groups (*Mine*, *Team*, *Unassigned*). Only one group can be opened at a time (by clicking on the group name), the other groups are collapsed automatically. The number in brackets next to the group's name states the number of cases contained in this group.

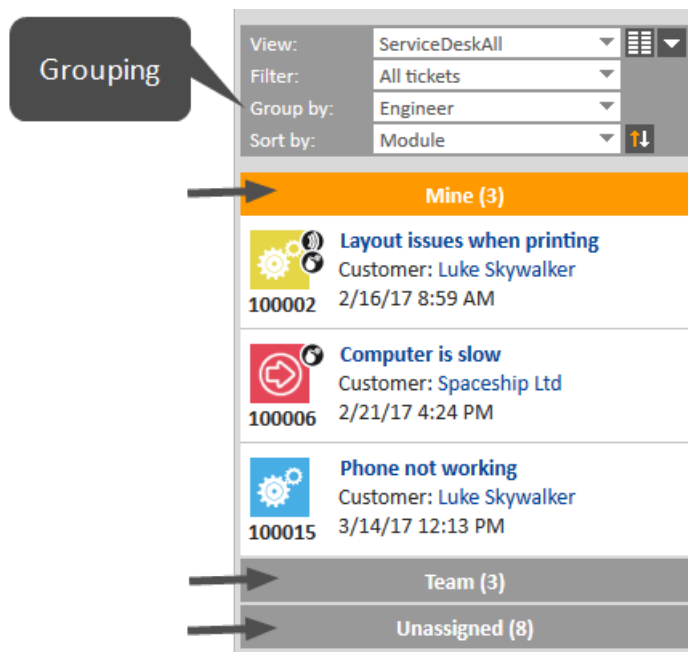



Figure 56: Selector for the grouping

**i** The chosen grouping applies only to the currently chosen view. This means that you can choose a grouping for each view. The Web Client saves this setting.

The following grouping options are available in every CM system:


- **No grouping**  
All cases are shown in one group named *All*.
- **Assignee**  
Cases are divided into three groups. The names of the groups depend on your individual CM configuration, but the groups always serve the same purpose:
  - Cases assigned to the currently logged in user (e.g., *Mine*)
  - Cases assigned to any other user but the currently logged in user (e.g., *Team*)
  - Cases not assigned to any user (e.g., *Unassigned*)

 If you use a filter, the drop-down menu *Group by* no longer shows the grouping option *Assignee*, since this would lead to empty groups. If you are missing this grouping option, please check if you have chosen a filter. You will see the grouping option *Assignee* again after you have chosen *All cases* from the drop-down menu *Filter*.

- **Process**

Cases are divided into as many groups as there are processes in your CM system, but you can only see the groups for processes for which you have at least read permission.

Whether there are further grouping options depends on the individual configuration of your CM system.

 It depends on the individual configuration of your CM system if empty groups, i.e., groups which do not contain any cases, are displayed. If you do not see a group in the case list, it might be empty.

## C.2.6 Sorting

The *Sort by* drop-down menu allows you to select the sorting criterion and the order of the cases **within each group** of the case list. Therefore, you do not change **which** cases are displayed in the case list, but rather **how** cases are displayed in the case list.

You can adjust the sorting as follows:

- Select a value from the *Sort by* drop-down list to determine the sorting criterion. The following sorting options are available in every CM system:
  - **Scope**  
Sorts the cases within the groups by the logical order of the scopes they are currently in. The logical order of the scopes is the order of the steps in your business processes, e.g., *Open Case - Case in progress - Query the technical department - Give solution to contact - Close Case*.
  - **Creation date**  
Sorts the cases within the groups by their creation date.
  - **Modification date**  
Sorts the cases within the groups by the date of their last modification.

Whether there are further sorting options depends on the individual configuration of your CM system.

- Click the *Sorting order* button to determine the order of the chosen sorting (ascending or descending).

## C.2.7 Displaying the case list as a grid

You can display the case list as a grid by clicking the *Show as grid* button. The selected view is used as a search criterion, and the selected grouping criterion is used in the *Group by* field to determine the columns of the grid. By default, there are no columns for deactivated values (in the example below "ESCALATION" is deactivated). You can add a column for a deactivated value by selecting the value in the *Add/Remove table column* drop-down (1).

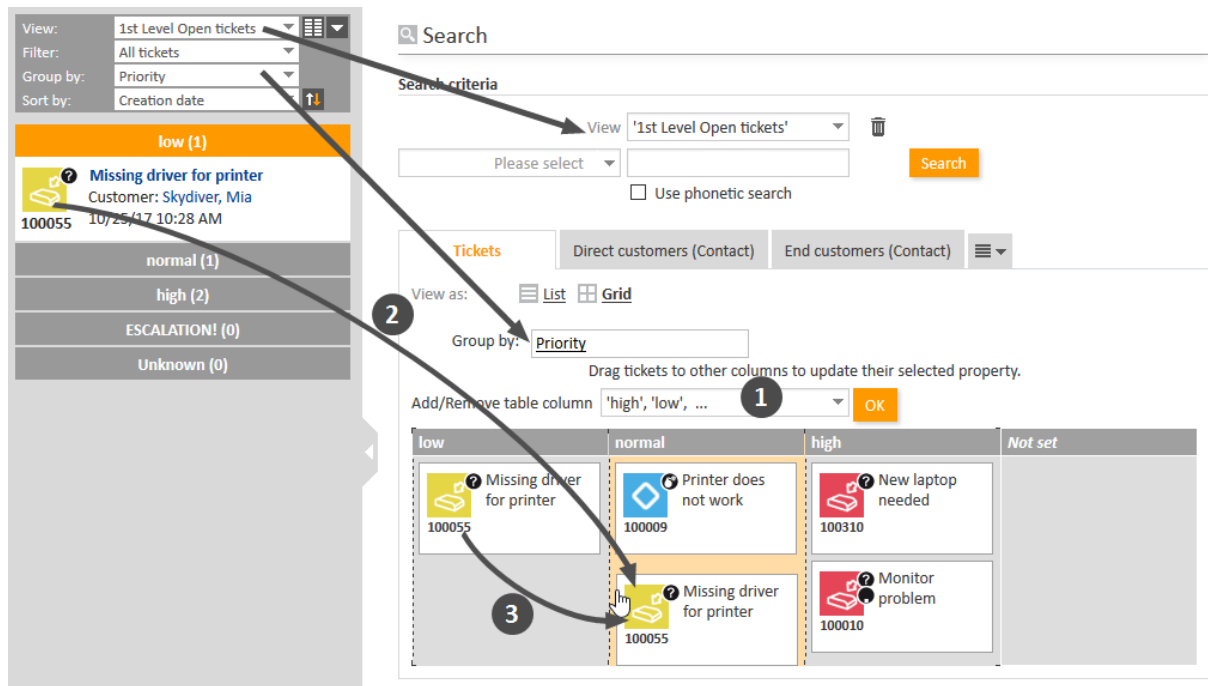



Figure 57: Displaying the case list as a grid

You can change the value of the case's grouping criterion (here *Priority*) in two ways using drag-and-drop:

- (2) Drag-and-drop the case from the case list to the column with the desired target value on the grid.
- (3) Drag-and drop the case from one column of the grid to the column with the desired target value.

In the above example, the case's priority is about to be changed from *low* to *normal*.

 You can only drag-and-drop cases if you have the required permissions.

Additionally, you can open a case from the display in the grid.

## C.3 Working with cases

You will probably work with cases. Here are some examples of tasks you might perform with ConSol CM:

- You create a new case, e.g., a contact calls and you create a support case. Please see [Creating a case](#) for further information.
- You accept an automatically created case to start working on it. Please see [Becoming the assignee](#) for further information.
- You edit the case data to enter all the information. Please see [Editing case data](#) for further information.
- You add a comment to the case, e.g., to record your work. Please see [Adding a comment](#) for further information.
- You add an attachment to the case, e.g., a screenshot provided by the contact. Please see [Adding an attachment](#) for further information.
- You read an email that was received by the case and answer it. Please see [Emails](#) for further information.
- You close the case after adding a comment with the solution. Please see [Performing workflow activities](#) for further information.


The following sections provide detailed information about the different tasks related to working with cases:

- [Creating a case](#)
- [Updating cases](#)
- [Working with contacts within cases](#)
- [Communication](#)
- [Additional assignees and approval processes](#)
- [Relations to cases and resources](#)

## C.3.1 Creating a case

### C.3.1.1 Starting the case creation

Depending on the business process implemented in your ConSol CM system, you might work on existing cases or create new cases yourself. Your business process can be configured for example to automatically create a case when a contact sends an email to the help desk. Alternatively, you might have the option to create a new case, for example when you receive a call from a contact who has a support request.

 You need the permission to create cases for at least one process in order to create new cases. If you do not have this permission or you have to work on existing cases only, you can skip this section as it does not apply to you.

There are several ways to create a new case:

- Click the *Create case* link in the main menu (1).
- Click the *Clone* link in the case that you want to copy. In this case, the new case will be filled automatically with the case and contact data of the original case. Also see [Cloning a case](#) (2).
- Click the *Create case* link on the contact page. In this case, the new case will be filled automatically with the data of this contact. Also see [Creating a case for the contact](#) (3).

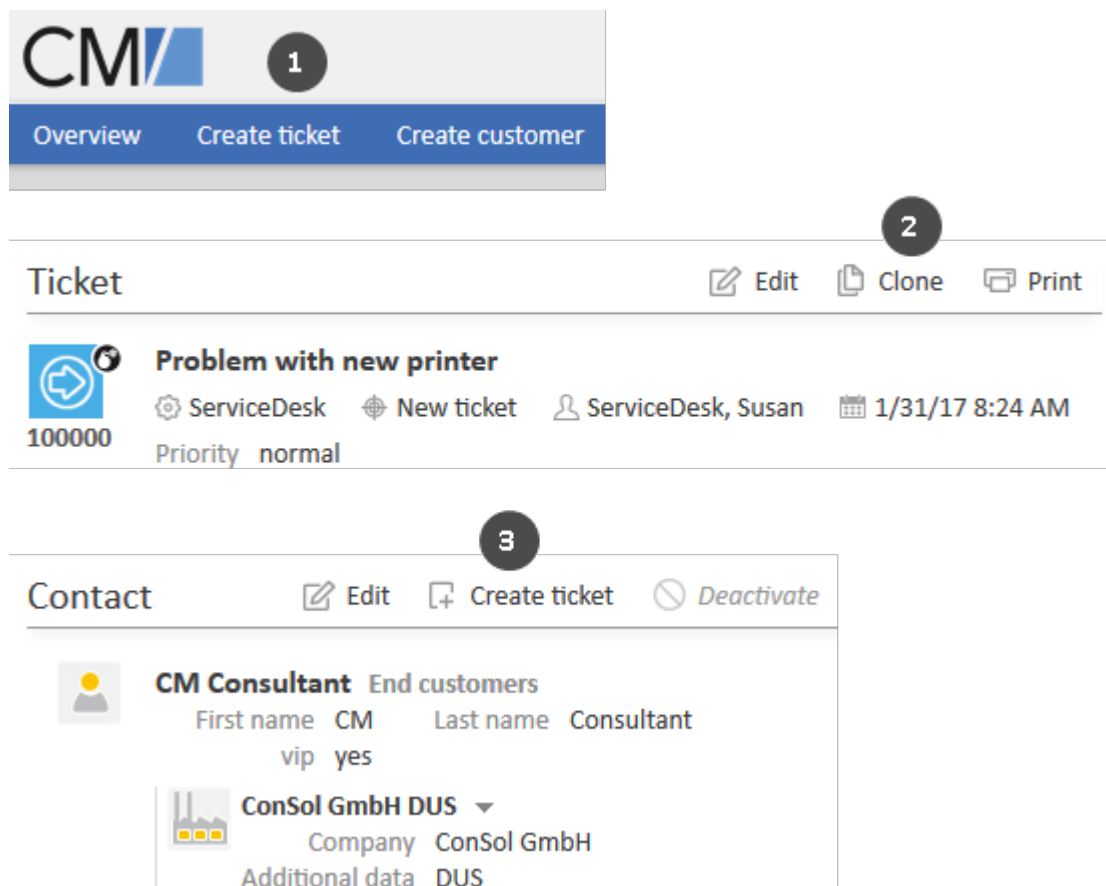



Figure 58: Creating a case



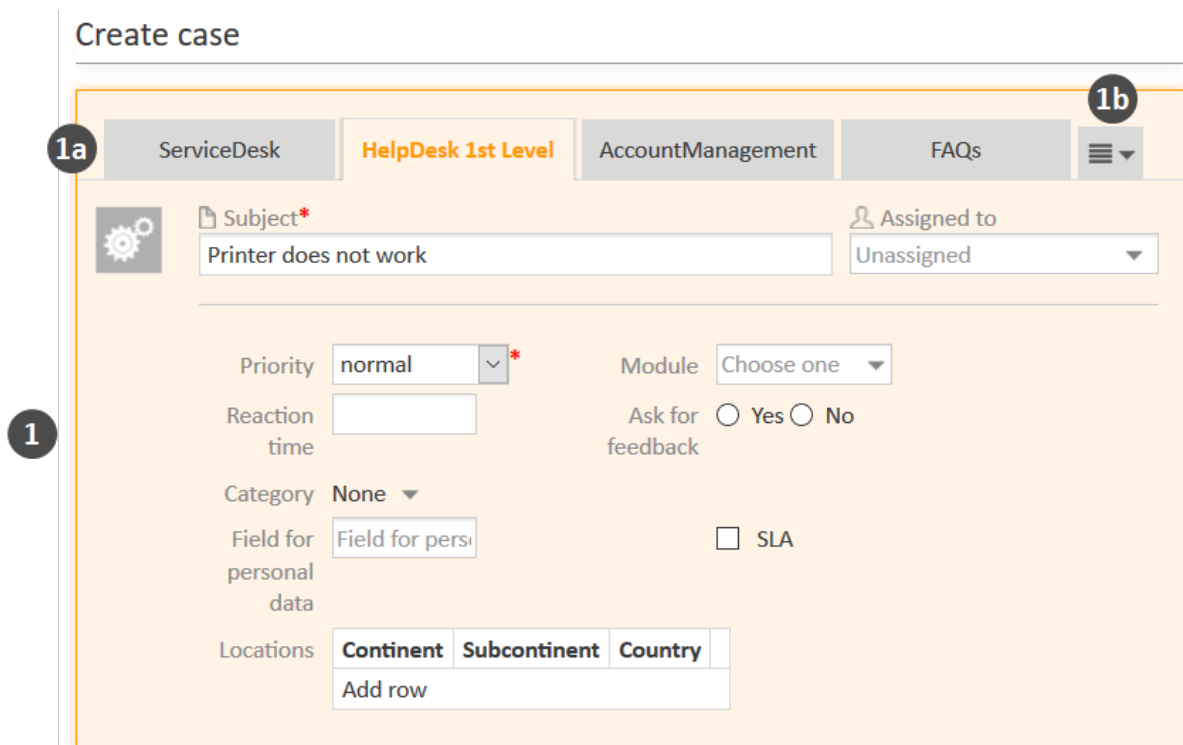
 Depending on your system configuration, there might be additional ways to create a new case, e.g., using contact actions or resource activities.

### C.3.1.2 Providing data

The *Create case* page is displayed after you chose to create a new case as described in the previous section. Depending on the selected way, some of the data may already be filled out. The following example shows the different sections of the *Create case* screen.


Fill out the data in the following sections:

#### Header section (1)



**Create case**

1a ServiceDesk **HelpDesk 1st Level** AccountManagement FAQs 1b


 Subject\* Printer does not work Assigned to Unassigned

1

Priority normal\* Reaction time Category None Field for personal data Locations Continent Subcontinent Country Add row

Module Choose one Ask for feedback Yes No ☐ SLA

Select the process by clicking the corresponding tab (1a). If there is not enough space for all the tabs on the screen, click the button with the three horizontal lines and choose the process from the drop-down list (1b). Enter the basic case data. The available fields depend on the selected process. Mandatory fields are marked with an asterisk.

 If you have permissions to create cases in more than one process, you can change the process in the *Process* field. The case will automatically adapt to the new process. Depending on the individual configuration of your CM system, a tooltip with a description is displayed when you hover over the process name.

## Contacts section (2)


Select the desired customer group by clicking the respective tab first. Afterwards you have to specify the contact. Depending on the contact data model of the selected customer group, you might have to select or create both a company and a person. Please see [Basic knowledge about contacts](#) for further information. You can specify the contact by either:

- **Selecting an existing contact**

Start the [Autocomplete Search](#) by typing some contact data. In case of a two-level contact data model, you have to search for the company first. Use the field *Please find or create company first.* for this purpose. In case of a one-level model, you can directly search for the company or person. Select the desired contact from the suggestions.

- **Creating a new contact**

In case of a one-level contact data model, enter the data of the new contact in the appropriate data fields. Click *Create and select* to save the new contact. If you want to create a new company in a two-level model, you have to click the *Create* link above the *Please find or create company first.* field first in order to display the data fields for the company.

 You can only create a new contact if you have the permission to create contacts in the selected customer group.

### Content section (3)

CONTENT

Add comment

+ Add template

B I U | [List Icons] | DIV (default) Font Family Font Size A

x<sup>2</sup> x<sub>2</sub> | [Table Icons] | Ω 😊 📎

Add attachment

Drop files or click to select files

You have to add a comment to create the case. If you want, you can also add an attachment.

Once you have entered all the required data, click the *Create* button to save the case (4). The background color will change from yellow (edit mode) to gray (view mode).

## C.3.2 Updating cases

This chapter discusses the following:

- [Accessing existing cases](#)
- [Becoming the assignee](#)
- [Editing case data](#)
- [Performing basic actions](#)
- [Performing workflow activities](#)

### C.3.2.1 Accessing existing cases

In order to work on a case, you need to open it first. There are several ways to open an existing case:

- Opening a case from the [case list](#) or [grid](#).
- Opening a case from the [Quick Search](#) results.
- Opening a case from a result table containing cases (e.g., on a [contact page](#), in the section for related cases of a [resource page](#), or in the [Detailed Search](#)).
- Opening a case using the *Jump to case* link in the [section for related cases](#) of another case.

### C.3.2.2 Becoming the assignee

Being the assignee means that you are in charge of the case at this moment. Cases can be assigned to a user manually and automatically.

Automatic assignments are configured by your CM administrator. Therefore, they depend on the configuration of your individual CM system, e.g., you might get assigned as the case's assignee when you execute a certain workflow activity or when you create a case.

Manual assignments can be performed in several ways:

- **(1) Accepting a case in the case header** (only unassigned cases, only assignment to yourself)  
Click *Accept* in the case header.
- **(2) Accepting a case in the case list** (only unassigned cases, only assignment to yourself)  
Click the checkmark icon in the upper right corner of the case in the case list.
- **(3) Changing the assignee of a case** (any case, assignment to yourself or another user)  
Click *Edit* to make the case data editable. Then, select a user from the *Assigned to* drop-down list. If the case is already assigned to a user, you have to remove the user's name first by clicking the red cross next to the name.



You can only change the assignee if you have the required permission.

**Case** ✓ Assign to me ✎ Edit 📄 Clone 🖨 Print

**Computer is slow**  
 ServiceDesk New ticket Unassigned 6/4/20 11:00 AM  
 Priority high  
 Desired deadline 6/11/20 10:59 AM

View: ServiceDeskAll

Mine (0)  
 Team (1)  
 Unassigned (2)

**Printer does not work** ✓  
 Contact: Christian Consultant  
 100009 6/4/20 10:51 AM

**Computer is slow** ✓ **2**  
 Contact: Mia Skydiver (Spaceship Ltd)  
 100010 6/4/20 11:00 AM

**Case** 📄 Clone 🖨 Print

**Computer is slow**  
 100010

Subject\*  
 Computer is slow

Queue\*  
 ServiceDesk

Assigned to **3**  
 Unassigned  
 Susan ServiceDesk  
 Sarah Service Desk  
 Susan ServiceDesk  
 Tony Tester


Priority high \*

Reaction time

Figure 59: Accepting a case

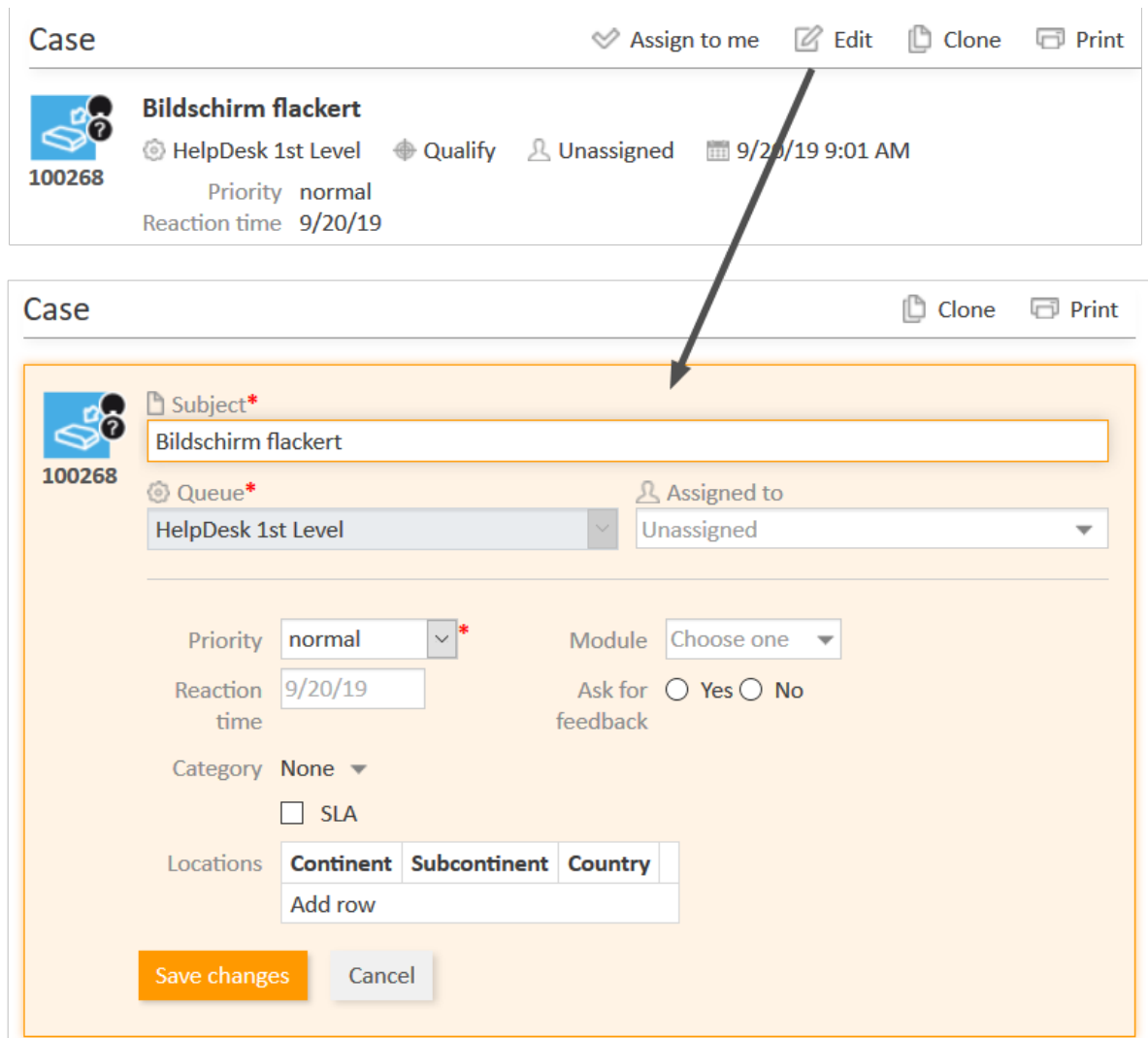
**Note regarding manual assignments using (1) and (2)**

If you are currently representing the user who is assigned to the case, you can accept the case using the *Accept* button (1) or the checkmark icon (2) even though the case is already assigned.

 The CM system might send you an email when you are added or removed as an assignee. The exact behavior depends on the configuration of your system.

### C.3.2.3 Editing case data

You can edit case data in the case header and in the details section. Click the *Edit* link in the upper right corner of the desired section to edit its data. The section's background turns yellow to indicate that it is in edit mode. Edit the case data as required (see [Data fields](#) for details about the different types of data fields). Click *Save changes* to save the new data. The section background turns gray again (view mode).




The screenshot shows the 'Case' header and details sections. The 'Edit' button in the header is highlighted with a yellow background. An arrow points from this button to the 'Edit' button in the details section, which is also highlighted with a yellow background. The details section contains the following fields:

- Subject\***: Bildschirm flackert
- Queue\***: HelpDesk 1st Level
- Assigned to**: Unassigned
- Priority**: normal
- Module**: Choose one
- Reaction time**: 9/20/19
- Ask for feedback**: Yes No
- Category**: None
- SLA**: ☐
- Locations**:
 

Continent	Subcontinent	Country
Add row		

At the bottom of the details section are the **Save changes** and **Cancel** buttons.


Figure 60: Editing case data

 You can only edit case data if you have the required permission.

### C.3.2.4 Performing basic actions

#### Cloning a case

You can clone a case to quickly create a new case which is very similar to an existing case. Usually, the case data (case header and details section) and the contact data (main contact and additional contacts) are copied from the original case to the cloned case. Other content such as attachments, comments, emails, and time bookings are not copied to the new case. There is no case relation or other technical connection between the two cases. Click the *Clone* link in the upper right corner of the case to duplicate it. The cloned case is opened in edit mode. Change its data as required and add a comment. Click *Create* to save the new case.

 The exact behavior of the cloning feature, i.e., which content is copied to the new case, depends on the individual configuration of your CM system.

#### Printing a case

You can print a case by clicking the *Print* link in the upper right corner of the case. A pop-up window is displayed where you can select the desired printer.

### C.3.2.5 Performing workflow activities

Workflow activities are used to move cases through the business process. The available workflow activities depend on the business process (workflow) implemented in your CM system.

The displayed workflow activities depend on:

- the **case** opened in the main working area
- the current **process** of the case
- the current **position** of the case within the **workflow**
- your **permissions**
- if you are added as an **additional assignee** to the case
- the **case status**

Open the case in the main working area to display the workflow activities which you can carry out for this particular case in this moment. The available workflow activities are displayed on the left, in the *Workflow activities* box **(1)**. Click a workflow activity to execute it. This will have one of the following effects:

- The workflow activity is executed immediately. You see the next workflow activities according to the new position of the case in the business process.
- An **ACF** (Activity Control Form) opens **(2)**. You have to [fill out the ACF](#) before the workflow activity can be executed.
- You see an info message that certain criteria are not fulfilled yet, e.g., you might have to fill out certain data fields or perform certain actions before you can execute a workflow activity.



In the following cases, no workflow activities are displayed:

- The business process for this case is already completed, i.e., the case is closed, and there is no reopen activity.
- The workflow activities at this point in the business process depend on conditions which are not yet fulfilled.
- You do not have the permissions needed to see the workflow activities at this point.

**Ticket** ✓ Accept ✎ Edit 📄 Clone 🖨 Print

---

**Printer does not work**

HelpDesk 1st Level Support Unassigned 2/23/17 9:10 AM

Priority high

Reaction time 2/23/17

100009

**Workflow activities**

- Transfer to 2nd level
- Close immediately
- Close after quick response
- Wait after query
- Qualify workaround ...

**DETAILS** ✎ Edit ▲

**Ticket** ✓ Accept ✎ Edit 📄 Clone 🖨 Print

---

**Qualify workaround ...**

Describe the impact of the workaround

Additional work Choose One

Delay Choose One

Coverage Choose One

Expected duration  \*

Save and continue Cancel

**Workflow activities**

- Transfer to 2nd level
- Close immediately
- Close after quick response
- Wait after query
- Qualify workaround ...

**Workspace**

Workspace is empty

All your unsaved tasks are

Figure 61: Workflow activities and ACF

#### Filling in an ACF

Workflow activities can be configured to open an ACF (Activity Control Form). ACFs are used to update case data. They allow you to easily locate the fields which you need to fill out in order to perform this workflow activity. It depends on the individual configuration of your CM system which ACFs are available. Examples for the usage of ACFs are workflow activities where you qualify a workaround, enter the feedback received by a contact, or prepare a quote.

The ACF is displayed above the Case Header. It has a yellow background to indicate that it is editable. You have to fill in the data in the ACF before you can continue. Click *Save and continue* to save your changes and execute the workflow activity. If you click *Cancel*, the case will remain in its previous position, i.e., the workflow activity is not executed.



### C.3.3 Working with contacts within cases

This chapter explains the concept of contacts in ConSol CM and provides information about the contact-related tasks which you can perform within cases.

- [Contacts in ConSol CM](#)
- [Specifying the main contact](#)
- [Changing the main contact](#)
- [Viewing the additional contacts](#)
- [Adding an additional contact](#)
- [Working with additional contacts](#)
- [Editing contact data](#)
- [Viewing the contact page](#)

#### C.3.3.1 Contacts in ConSol CM

Contacts represent the **external** side of the CM system. The contact is the person or object that is the **reason for creating the case** and is usually informed once work on the case has been completed. This can be, for example, clients who purchased your company's products or colleagues who receive IT support from your team.

There are two kinds of contacts in ConSol CM:

- **Main contact**  
The contact who gives the reason for creating a case. A case must have exactly one main contact. The main contact is mandatory; you cannot create a case without a main contact.
- **Additional contacts**  
Any contact who is interested in the case. An additional contact can have a contact role which describes why the contact was added to the case. Additional contacts are optional. A case can have any number of additional contacts.

Both the main contact and the additional contacts can be *persons* and/or *companies*. It depends on your system configuration which kinds of contacts are available. Please see [Basic knowledge about contacts](#) for a detailed explanation of the usage of persons and companies in ConSol CM.

There are two main actions related to contacts which can be carried out in cases:

- **Adding contacts to the case**  
You have to specify one main contact for the case. This is done when the case is created. You can then add any number of additional contacts. This action can only be done within the case.
- **Working with contact data**  
You can edit the data of the main contact and additional contacts assigned to the case and you can deactivate contacts within the case. These actions can either be done within the case or on the respective contact page. Please see [Managing contacts](#) for detailed information about these actions.



Please bear in mind that all changes done to contact data are **global changes**, i.e., the new data will be automatically used in all places within ConSol CM (contact pages, other cases).

All actions involving contacts are carried out in the [contacts section](#) of the case.

### C.3.3.2 Main contact

The main contact is the contact who gave the reason for creating the case. A case always has to have exactly **one** main contact. It depends on the customer group if you can add a person, a company, or a person or company as the main contact.

- **One-level contact data models**


The data model contains either only persons or only companies. Therefore, you can either add a person or a company as the main contact.

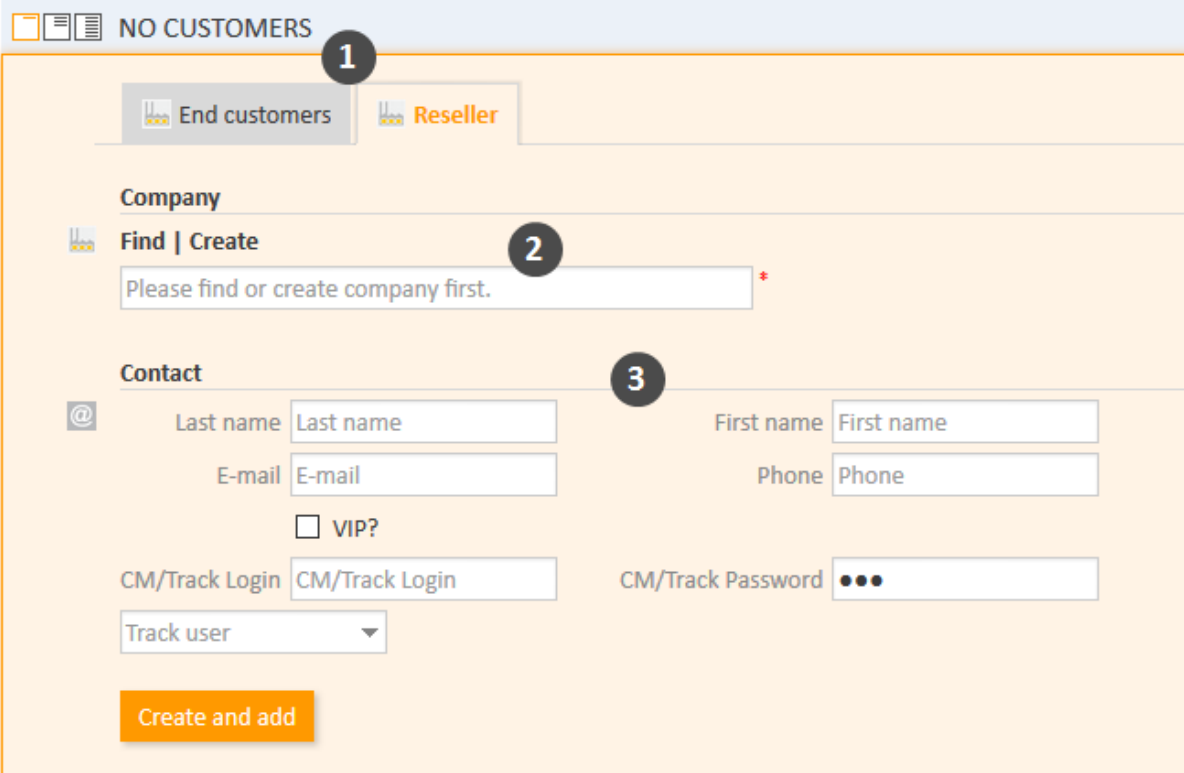
- **Two-level contact data models**

The data model contains both persons and companies. Depending on your system configuration, you can either add only a person, a company, or a person or a company as the main contact.

#### Specifying the main contact

When you create a new case, you can select an existing contact as the case's main contact or create a new contact for this purpose.

 You can only create a new contact if you have the required permissions.



**NO CUSTOMERS**

**End customers** **Reseller**

**Company**

**Find | Create**

Please find or create company first. \*

**Contact**

@ Last name First name

E-mail Phone

☐ VIP?

CM/Track Login CM/Track Password

Track user

**Create and add**

Figure 62: Contact section in a new case: Adding an existing contact during case creation


Please proceed as follows to create a new contact:

1. If more than one customer group is available, select the tab with the desired **customer group**.

2. **Specify the company**

You can either select an existing company or create a new one:


- a. To **select an existing company**, start typing the company name and select the desired company from the suggestions provided by the [Autocomplete Search](#).
- b. To **create a new company**, click the *Create* link above the entry field and fill in the provided data fields. Click *Create and select* to confirm your entry.

 If you work with a two-level contact model which allows adding a company as a contact, you can click the *Select* button to add this company as the main contact. In this case, you don't have to specify a person.

3. **Specify the person**

You can either select an existing person or create a new one:

- a. To **select an existing person**, start typing into one of the data fields to see the suggestions provided by the [Autocomplete Search](#). Please note that it depends on your system configuration which fields can be used for the Autocomplete Search. Click *Select* to confirm your entry and to add this person as the main contact.
- b. To **create a new person**, fill in the provided data fields. Click *Create and select* to confirm your entry and to add this person as the main contact.

 If you work with a one-level contact model, you skip the second step.

### Changing the main contact

You can change the main contact of an existing case by clicking the *Change* link in the context menu (little arrow icon next to the contact's name). The main contact is removed from the case and you can select a new one as described in [Specifying the main contact](#).

### C.3.3.3 Additional contacts

Additional contacts are contacts who are interested in the case. They are optional and usually have a role indicating the reason why they were added. You can add as many additional contacts as you want. It depends on the customer group if you can add a person, a company, or a person or company as an additional contact. The effects of adding an additional contact depend on the individual configuration of your CM system, e.g., additional contacts could for example receive a copy of the emails sent to the main contact.

### Viewing the additional contacts

Click the *There are more contacts* link to display the additional contacts of a case.

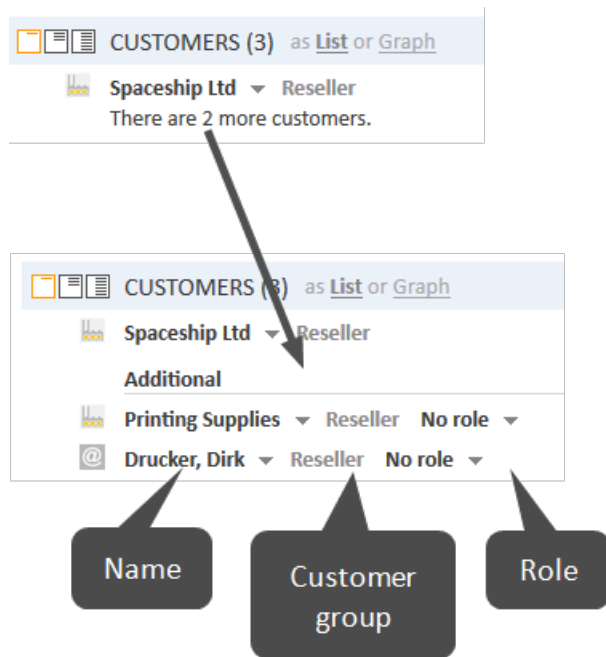


Figure 63: Viewing additional contacts

#### Adding an additional contact

To add a new additional contact, click the *Add* link in the upper right corner of the contacts section. You can either select an existing contact or create a new one. Selecting and creating additional contacts works in the same way as selecting and creating main contacts, see [Specifying the main contact](#).

#### Working with additional contacts

There are several actions which you can carry out for an additional contact. Depending on the type of action, they are either located in the context menu of the additional contact or in the context menu of the role.

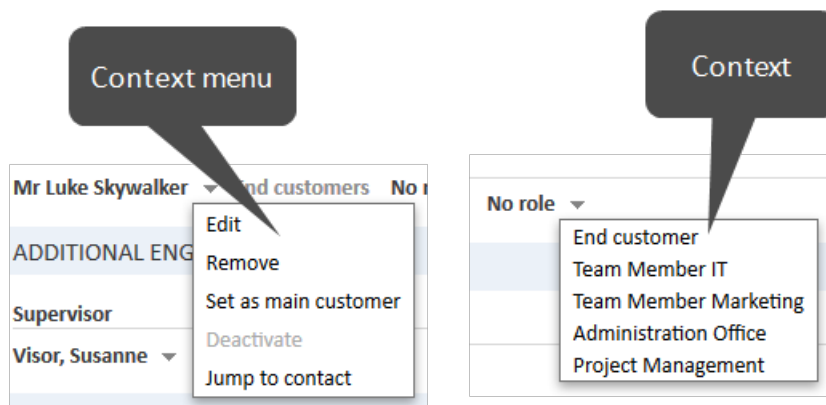


Figure 64: Context menus of additional contacts

#### Removing an additional contact

To remove an additional contact, open the context menu by clicking the little arrow next to the contact's name and click *Remove*. Then, click *Yes* to confirm the removal of the additional contact. You cannot undo the removal once you confirmed it.

### Setting an additional contact as main contact

To set an additional contact as main contact of the case, open the context menu by clicking the little arrow next to the contact's name and click *Set as main contact*. The additional contact becomes the new main contact and the previous main contact becomes an additional contact.

### Indicating a role for an additional contact

The **contact role** states the purpose or reason for adding an additional contact to this particular case. This way, you can, for example, add the contact's project manager as an additional contact to the case and give him the corresponding role. Assigning a contact role to an additional contact is optional. The available contact roles and their effects depend on the individual configuration of your CM system.

To indicate a contact role, open the context menu of the role by clicking the little arrow next to the role and select the desired role. If the additional contact already has a role and you want to remove it, select *No role*.

## C.3.3.4 Working with main and additional contacts

The following actions are available for both the main contact and additional contacts:

- [Editing contact data](#)
- [Viewing the contact page](#)

### Editing contact data

You can edit the contact data of both the main contact and any additional contacts from within the case.



Editing contact data is a **global change**. It does not matter where you change the contact data (on the contact page, in the case), the data is always changed in the **whole CM system**, i.e., the changes are visible in every case the contact is added to and on the contact page.

To edit the data of the main contact or an additional contact, click the *Edit* link in the respective context menu. The background of the Contacts section turns yellow to indicate that it is in edit mode. Make the required changes and click *Save changes*. You can find detailed information about editing contact data in [Editing contact data](#).



You can only edit contact data within cases if you have the permission to edit contacts of the respective customer group, and if your system is configured to allow editing contact data within cases.

### Viewing the contact page

You can open the [contact page](#) of the main contact or an additional contact by opening the context menu of the contact and clicking the *Jump to* link. Depending on whether the contact is a person or a company, the link is either called *Jump to person* or *Jump to company*.

## C.3.4 Communication

### C.3.4.1 History section

The [history section](#) of the case contains the record of all changes made to the case. The section header provides links to the following communication-related features:

- [Comments](#)
- [Emails](#)
- [Attachments](#)
- Documents (optional add-on, see [CM/Doc](#))
- [Time booking](#)

The ConSol CM Web Client includes several features which facilitate efficient work:

- [Classes of text](#) for highlighting certain entries of the case history
- [The rich text editor](#) for drafting comments and emails
- [Templates](#) for drafting comments and emails

### C.3.4.2 Classes of text

Classes of text are used to emphasize entries of the case history. You can mark emails, comments, and attachments in the case history with a certain class of text. Usually, the class of text highlights the entry with a certain color and adds an icon to the entry. The available classes of text, including colors and icons, depend on the individual configuration of your CM system.

A class of text has several functions:

- Highlighting the entry, thus helping the user to find a certain type of entry.
- Controlling the visibility of an entry in the contact portal CM/Track, i.e., only entries with a certain class of text are visible to contacts in CM/Track. (Please see [Visibility of comments in CM/Track](#) for further information.)
- Controlling the business process, e.g., the case can only be closed if at least one entry is marked as the solution.

The following figure shows a history entry with the class of text *Feedback* (purple background and arrows icon). Click the icon to select another class of text for the entry.

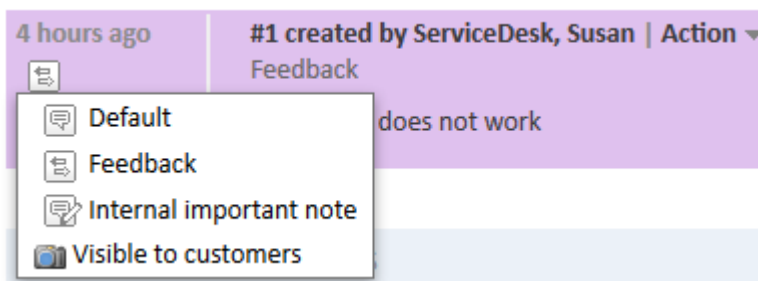


Figure 65: *Classes of text in the case history*

### C.3.4.3 Rich text editor

You use the rich text editor to write emails and comments. It consists of a text field, where you enter your text, and a menu bar with several buttons, which allow you to format the text and insert tables, images and special characters.

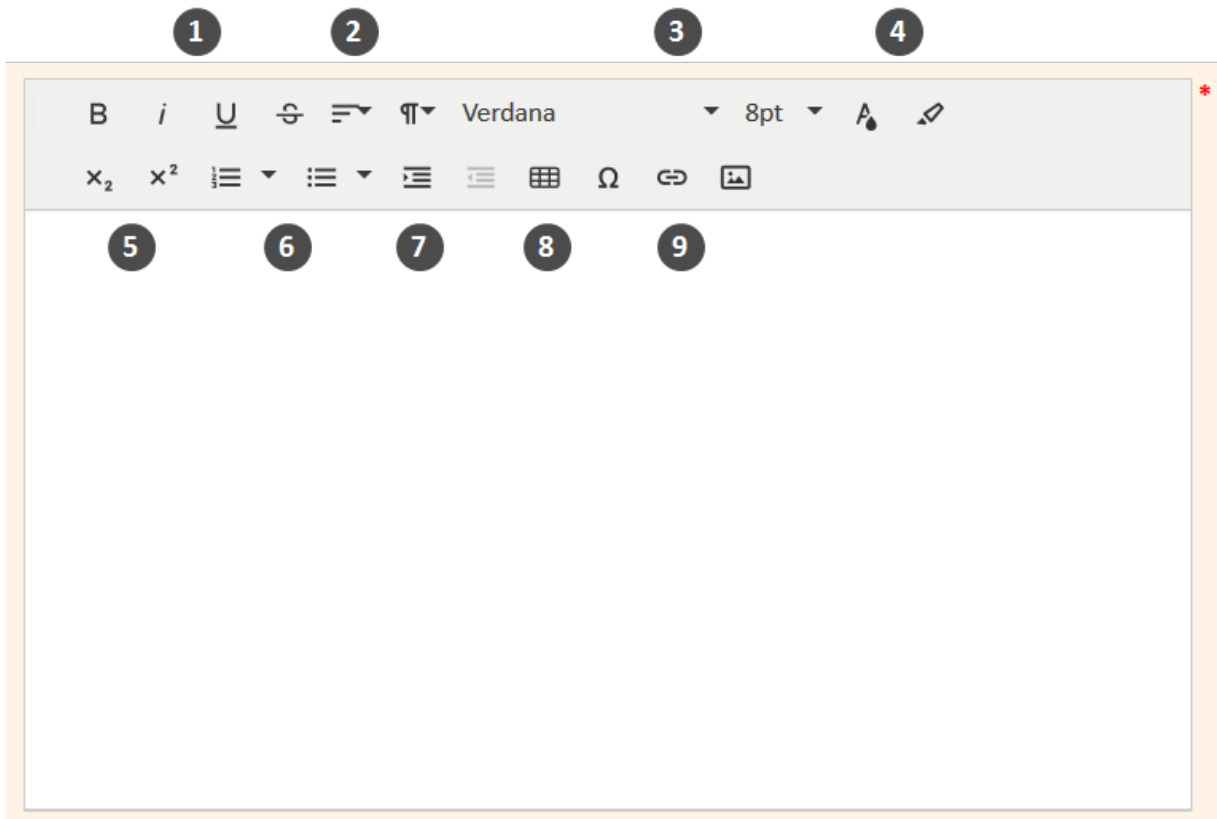



Figure 66: *The rich text editor*

- (1) Font style (bold, italics, underlined, strikethrough)
- (2) Alignment (left-aligned, centered, right-aligned, justified)
- (3) Font (format, font family, font size)
- (4) Color (text color, background color)
- (5) Superscript and subscript
- (6) Lists (ordered list, unordered list)
- (7) Indention (increase, decrease)
- (8) Insert table
- (9) Insert (special character, link, image)

**i** Some items, e.g. tables, links and images, have a context menu for further settings. The context menu is opened when you click the item.


 It depends on the individual configuration of your CM system if all formatting features are available.

#### C.3.4.4 Comments

Comments are used to document work on the case. All comments are registered in the case history, where you can see both your own comments, the comments added by other users, and, depending on your system configuration, the comments added by the contact (via email and/or via the portal **CM/Track**).

##### Adding a comment

To add a comment (e.g., a note about your last call with the contact), click the *Comment* link in the header of the history section. The background of the history section turns yellow to indicate that it is in edit mode. If the section is already in edit mode, you can also add a comment by clicking the *Comment* tab. Depending on your system configuration, the rich text editor might already contain a certain template, e.g., your signature. You can select a template for your comment by clicking the *Change* link in the *Template* context menu. To remove a template, click the *Remove* link in the context menu. Templates can include attachments which can be deselected as needed. Please see [Templates](#) for a detailed description of templates. Write your comment using the rich text editor and click *Add Comment* to save it.


 You can also add a new comment by clicking *Clone* in the *Action* menu of an existing comment or email. This opens the rich text editor with the text of the existing comment or email. This way you do not need to type the text again.

##### Editing a comment

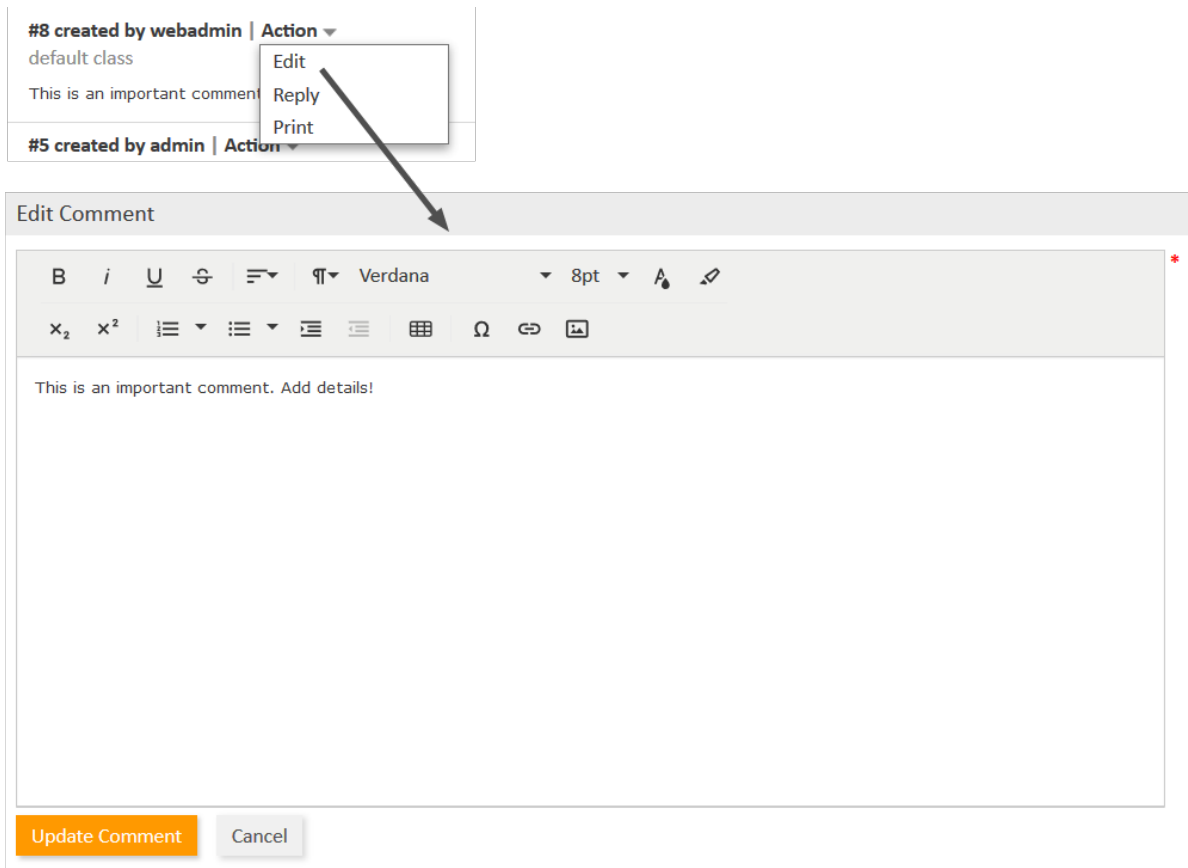
You can edit a comment which you added by clicking *Edit* in the *Action* menu of the comment. The rich text editor with the original comment is opened and you can edit the text. Click *Update Comment* to save your changes.

The case history always shows the last version of the comment. The previous versions can be opened by clicking the *changed ago* link in the case history (see [Viewing the history of a comment](#)).

Editing is only allowed during a certain time after the comment was added. The time depends on your CM system.

 It is not possible to edit comments of other users.

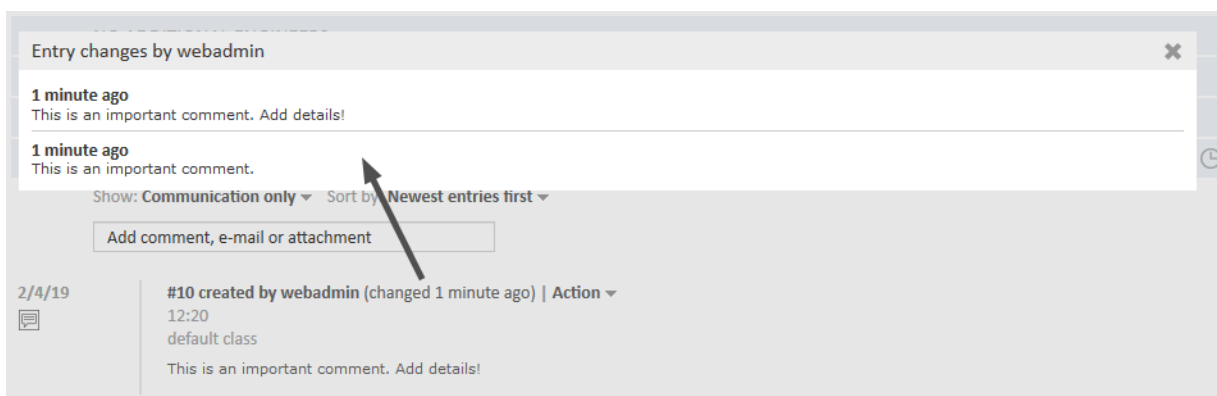


Figure 67: *Editing a comment*

It depends on the individual configuration of your CM system if comment editing is available.

### Viewing the history of a comment

If a comment was edited by any user, its heading shows a *changed ago* link. You can click the link to view the history of the comment, i.e., the different versions of the comment.

Figure 68: *Viewing the history of a comment*

A comment can only be changed by its original author.

### Replying to a comment

You can reply to a comment to quote an existing comment in your comment. To do so, open the *Action* menu of the desired comment and click *Reply*. The original comment is quoted in the rich text editor. Enter your comment and click *Add Comment*. The new comment is displayed in a separate entry, i.e., it is not shown below the initial comment but in its usual position according to the defined sorting order.

### Printing a comment

You can print a comment by clicking *Print* in the *Action* menu of a comment. This opens the print dialogue of your operating system. If you have a PDF utility installed, you can choose to print the comment to a PDF file. The printed output contains the comment and some additional information about the comment entry, i.e., the date and time of the entry, the case number and subject, and the author of the entry.

## C.3.4.5 Emails

The Web Client can send and receive emails related to cases. Emails are always sent from within the case they concern. You can send emails to the contact and to any recipient with a valid email address. All emails sent from the Web Client are displayed in the case history. If the recipient replies to the email, the reply is also added to the case history. The case history therefore provides an overview of all email communication, including attachments.

### Sending emails

To draft the email click the *Email* link in the header of the history section. The background of the history section turns yellow to indicate that it is in edit mode. If the section is already in edit mode, you can also write an email by clicking the *Email* tab. Depending on your system configuration, the rich text editor might already contain a certain template, e.g., your signature. You can edit the text before sending the email.

Comment **E-Mail** Attachment Time booking

**New E-mail**

[show Cc](#) | [show Bcc](#)

1 To: Peter Diermau <diermau@devnull.consol.de> x

Reply-To: cmdoku@consol.de

Subject: Ticket (101267) Email Attachments

2 Attachments + Add attachments

3 Quote [Select entries](#) | [Entries visible to contacts](#) + Add template 4

B i U Verdana 8pt A

x<sub>2</sub> x<sup>2</sup>

Best regards

5

Send E-Mail Cancel

Figure 69: Sending an email

- **Standard email fields (1)**

- **To**

This field contains the recipient of the email. In most CM systems, it is initially filled with the email address of the case's main contact (if provided). Depending on the system configuration, you see the email address and/or the name of the recipient. You can remove the recipient by clicking the little cross next to the name and you can add multiple recipients separated by a comma. As soon as you start typing the recipient's email address or name, the CM system suggests matching recipients.

- **Cc/show Cc**

This field contains the recipients which should receive a copy of the email. If the Cc field is not displayed, click the *show Cc* link.

- **Bcc/show Bcc**  
This field contains the recipients which should receive a blind copy of the email. If the *Bcc* field is not displayed, click the *show Bcc* link.
- **Reply-To**  
This field contains the reply-to address used in the email. This is usually a system address. Do **not** change it!
- **Subject**  
This field contains the email subject. The subject is set automatically by the system. Do **not** change it! Otherwise the replies might not be correctly attached to the case.
- **Attachments (2)**  
Here you can select attachments to be sent with the email. You can only select attachments which are already added to the case or included in a selected template, i.e., it is not possible to upload a new attachment here. This field is hidden if the case does not have any attachments.
- **Quote (3)**  
Here you can quote communication entries (comments and emails) from the case history. You can either click *Entries visible to the contact* to select all communication entries which are marked with a class of text which is visible to contacts, or click *Select entries* to manually choose the communication entries which you want to quote. In the latter case, you have to click the entry in the case history (outside the pop-up window). The selectable entries are indicated by a scissors icon.
- **Add template (4)**  
Here you can select one or several templates for the email text. Depending on your system configuration, a standard template might be initially selected. You can select another template or edit the template text before sending the email. Please see [Templates](#) for a detailed description of templates.
- **Rich text editor (5)**  
This field contains the email body, i.e., the text which is sent. You can format the email text using the features of the rich text editor.

Draft your email and click *Send Email* to send it to the indicated recipients.

#### Replying to emails and forwarding emails

You can reply to and forward an email from the case history.

To **reply to an email**, open the *Action* menu of the desired email and click *Reply / Reply all*. The rich text editor is opened. The sender of the original email is automatically selected as a recipient in *To:* and the original email is quoted under *in reply to*. You can edit and send your email as described in [Sending emails](#).

To **forward an email**, open the *Action* menu of the desired email and click *Forward*. The rich text editor is opened. The original email is quoted under *Original Message* and you have to specify the recipient in the *To:* field. You can edit and send your email as described in [Sending emails](#).

#### Printing an email

You can print an email by clicking *Print* in the *Action* menu of an email. This opens the print dialogue of your operating system. If you have a PDF utility installed, you can choose to print the email to a PDF file. The printed output contains the email and some additional information about the email entry, i.e., the date and time of the entry, the case number and subject, and the author of the entry.

### Retrying an email

If you send an email which cannot be delivered, e.g., because there is a problem with the mail server, the text *This email was not delivered* is displayed in the respective history entry. You can click *Retry* in the *Action* menu to make another attempt at sending the email.

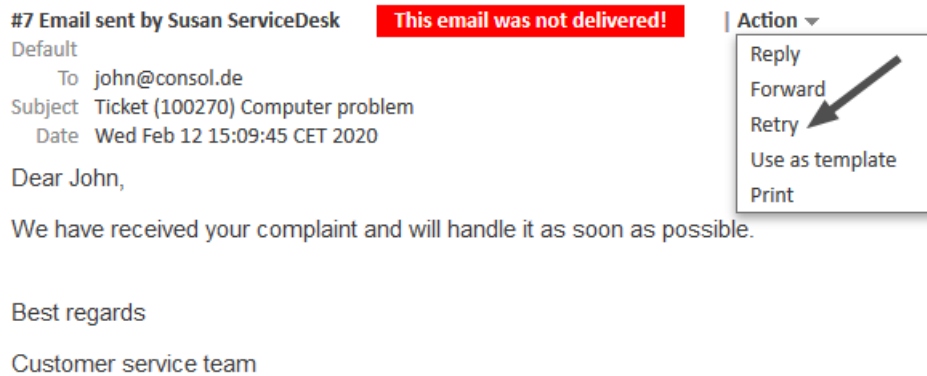


Figure 70: Sending an email again

### C.3.4.6 Templates

Templates contain predefined text, e.g., a signature or a list of standard questions, which can be used in the rich text editor for comments and emails. The available templates depend on the individual configuration of your CM system, as templates are created and managed by your CM administrator or template manager.

To select a template while drafting a comment or email, click the *Add template* button. The available templates are displayed in a list **(1)**, which is grouped by the templates' groups and subgroups **(3)**. You can filter **(2)** the list by searching for a template. To do so, enter one or several keywords in the filter field above the template list. Only templates which contain the keywords in the template text, name or group/subgroup are displayed. Hover over a template name **(4)** to display the preview of the template **(5)**. You can select a template by clicking the template name in the list or by clicking the *Add template* button in the preview window.

The *Show templates suitable for this context* is selected by default. You can deselect it to display additional templates.

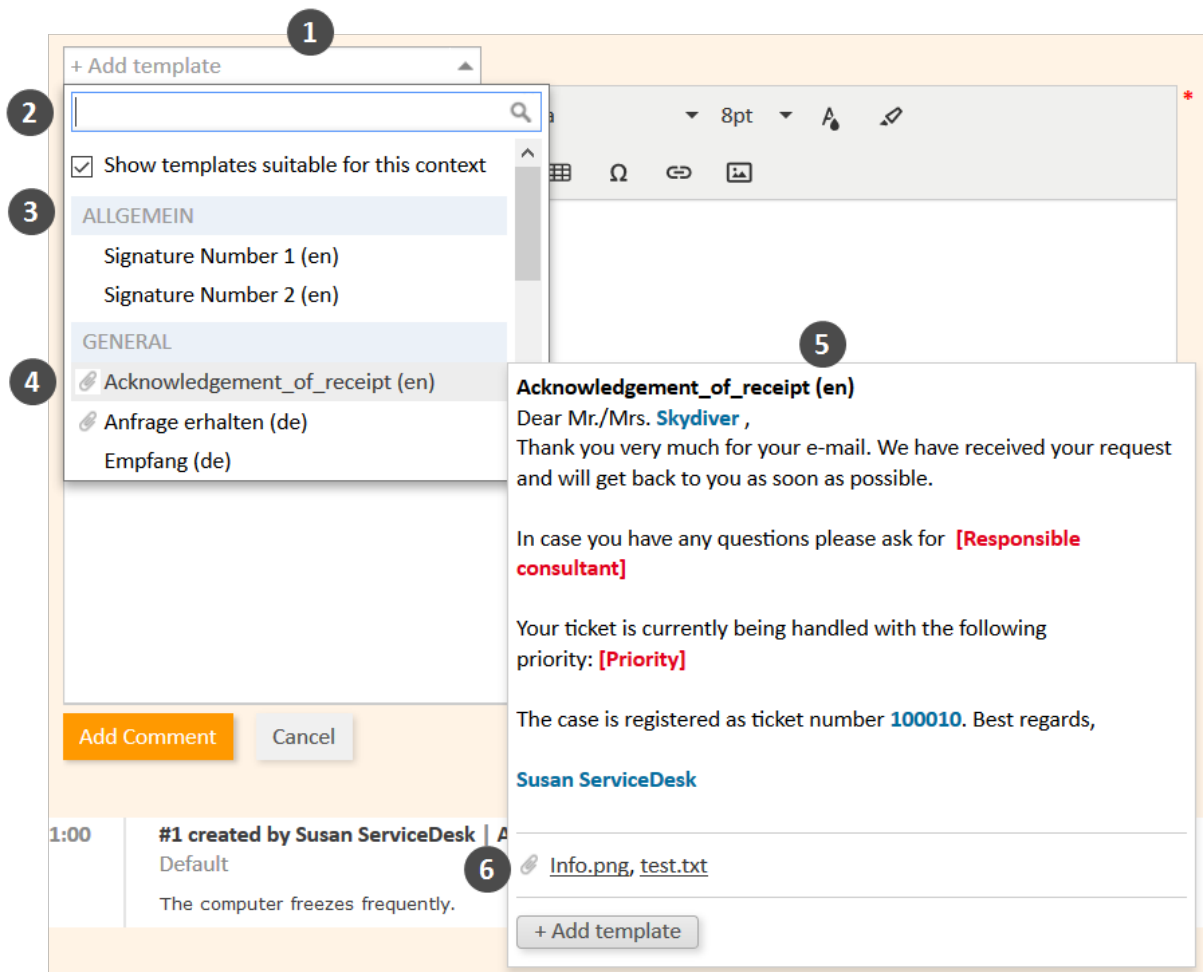


Figure 71: Selecting a template

Templates can include attachments. In this case a paper clip icon is displayed in front of the template name and the attachments are listed in the preview (6). If you select such a template, the included attachments are automatically added to the case and selected for the comment or email. You can deselect them by clicking the X icon next to the attachment. If you accidentally deselected an attachment you can select it again in the *Add attachments* drop-down list.

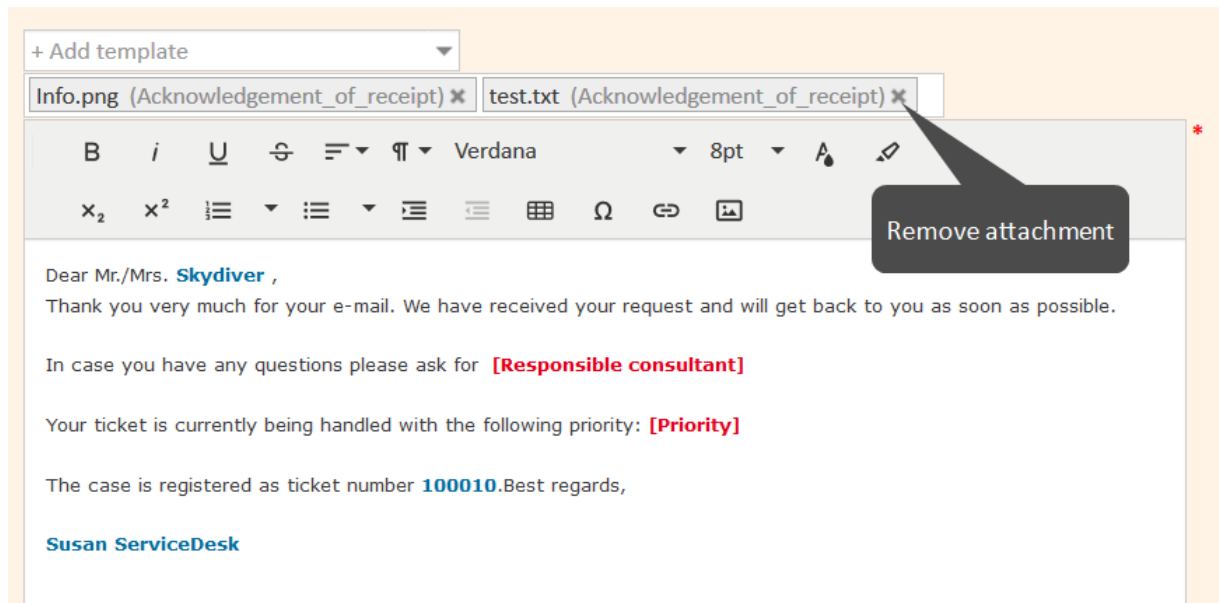



Figure 72: Template with attachments

The template is inserted into the rich text editor. Templates usually contain text, but they might also include variables, parameters, and text blocks. The following figure shows a template with these features. You can enter data in the section above the text, and you can edit the text using the rich text editor.

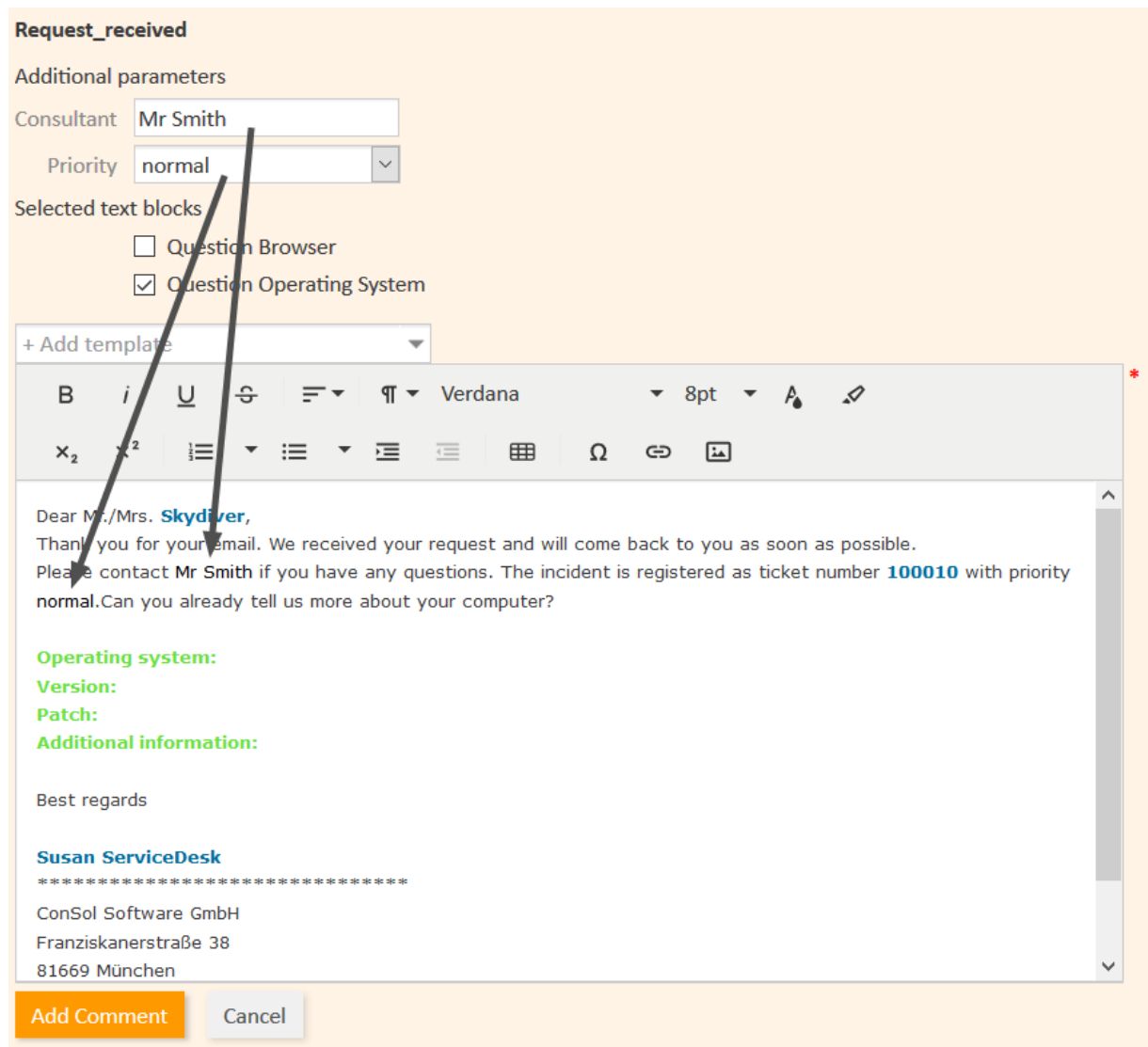
Figure 73: Template (not yet edited)

- Variable (1)**  
 Variables have a blue font in the text area. In the above example, the template contains a variable to indicate the name of the main contact. The corresponding value, here “Skydiver”, is automatically retrieved and inserted into the text.
- Parameters (2)**  
 Parameters have a red font in the text area. They are used as placeholders. The user has to specify the value for each field in the *Additional parameters* section. There are two types of parameters:
  - String parameters:** The user has to fill out the text field next to the parameter name. In the above example, *Consultant* is a string parameter.
  - Enum parameters:** The user has to select one of the values from the drop-down list next to the parameter name. In the above example, *Priority* is an enum parameter.
- Text blocks (3)**  
 Text blocks have a green font in the text area. The user can select the text blocks he wants to include in the *Selected text blocks* section. In the above example, only one of the two available text blocks has been selected.



 The email or comment you create does not include the colors. Therefore the variables, parameters, and text blocks cannot be distinguished from the rest of the text in the email or comment once it is finished.

The following figure shows the same template after the user has filled out the parameters.



**Request\_received**

Additional parameters

Consultant

Priority

Selected text blocks

☐ Question Browser

☒ Question Operating System

+ Add template

Rich text editor toolbar: Bold (B), Italic (i), Underline (U), Bulleted list, Numbered list, Indent, Outdent, Font face (Verdana), Font size (8pt), Text color, Background color.

Preview text:

Dear Mr./Mrs. **Skydiver**,

Thank you for your email. We received your request and will come back to you as soon as possible.

Please contact Mr Smith if you have any questions. The incident is registered as ticket number **100010** with priority **normal**. Can you already tell us more about your computer?

**Operating system:**

**Version:**

**Patch:**

**Additional information:**

Best regards

**Susan ServiceDesk**

\*\*\*\*\*

ConSol Software GmbH

Franziskanerstraße 38

81669 München

Buttons: Add Comment, Cancel

Figure 74: Template (parameters filled out)

### C.3.4.7 Attachments

Attachments are files that are attached to a case. You can find a list of all attachments in the [attachment section](#) below the history section.



ATTACHMENTS (1) ^						
Class ↕	File type	Name ↕	Description ↕	Date ↕	Added by ↕	Action
Choose One ▾	Choose One ▾				Choose One ▾	Apply filters Clear filters
 Normal attachment		Order.docx		2/23/17 2:10 PM	Susan ServiceDesk	Show in history

Figure 75: Attachment list in a case

The list of attachments provides the following information. You can filter the list using the drop-down boxes and text fields in the header.

- **Class**  
Indicates the class of text applied to the attachment. You can click the icon of the current class of text to select a new one (1).
- **File type**  
Indicates the file type of the attachment.
- **Name**  
Indicates the file name of the attachment. Click the file name to download the corresponding attachment (2).
- **Description**  
Indicates the description provided when the attachment was added, if any.
- **Date**  
Indicates the date when the attachment was added.
- **Added by**  
Indicates who added the attachment. This can be either a user (who uploaded the file) or a technical user (in case the file was attached to an incoming email).
- **Action**  
Provides links to the available actions. These are:
  - **Apply filters**  
Filters the list according to your selections in the header.
  - **Clear filters**  
Removes the filter, i.e., displays all entries.
  - **Show in history**  
Jumps to the history entry of the attachment, where you can perform additional actions. This option is only visible if the respective history entry is displayed based on the selected visibility setting.

#### Adding an attachment

To add an attachment, click the *Attachment* link in the header of the history section. The background of the history section turns yellow to indicate that it is in edit mode. If the section is already in edit mode, you can also add an attachment by clicking the *Attachment* tab.

Figure 76: Adding an attachment

Please proceed as follows to add an attachment:

1. Specify the files to be uploaded by either:
  - Dragging and dropping them into the white area.
  - Clicking into the white area to open a file browser dialogue and selecting the files.

**i** The maximum size which is allowed for files is displayed above the white area.

2. The selected files are displayed in a list below the white area. Optionally, you can add a description in the *Description* field. Click the *Delete* link to remove a file from the list.
3. Click the *Add Attachment* button to upload the files to the case.

**i** Depending on the configuration of your CM system, only specific file types might be allowed as attachments. If you try to upload a non-allowed file type, a corresponding message will be displayed next to the upload field.

The attachments are then displayed in the attachment section and in the corresponding history entry (only shown when *Extended* or *Detail* is selected as [visibility level](#)).

Once an attachment has been added to a case, you can use it in an email.

### Working with attachments

The history section contains both manually added attachments and attachments from incoming emails. You can perform additional actions for these attachments.

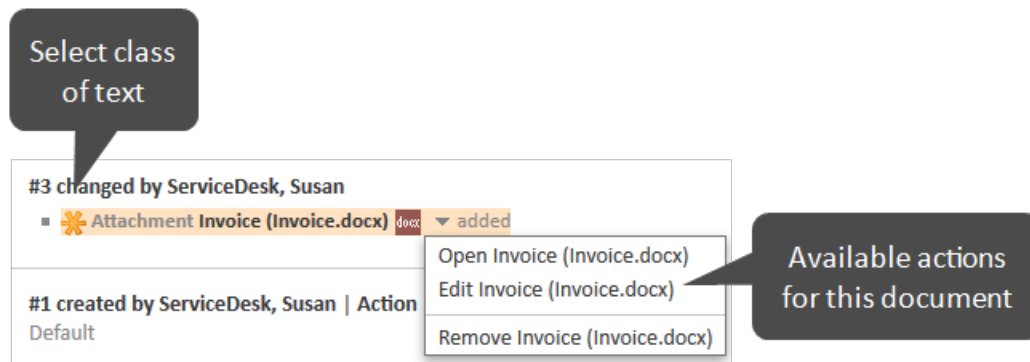


Figure 77: Actions for attachments

- **Select class of text**  
Click the class of text icon to select another class of text.
- **Open**  
Downloads the attachment.
- **Remove**  
Removes the attachment (may be deactivated for attachments from incoming emails).
- **Edit** (only [CM/Doc](#))  
Downloads the attachment and opens it. You can edit the file. The edited file is uploaded automatically once you click *Save* in Microsoft Word or OpenOffice.

**i** You need the necessary applications installed on your computer to be able to open attachments, e.g., Adobe Reader for PDF documents or Microsoft Word for DOCX documents. It depends on the individual configuration of your CM system if CM/Doc is available.

### C.3.4.8 Document templates (CM/Doc)

#### About document templates

Document templates are managed using CM/Doc, an optional add-on that allows you to quickly create Microsoft Word or OpenOffice documents for the cases you work on. The new documents are created based on document templates in Microsoft Word or OpenOffice formats.

**i** The available document templates depend on the individual configuration of your CM system, as templates are created and managed by your CM administrator or template manager.

You can use CM/Doc to create Microsoft Word or OpenOffice documents which you can attach to the case and/or send to the contact. The documents usually contain some predefined text and are pre-filled with data from the case (case data, contact data or assignee data).

#### Example


You want to create an invoice for a case concerning the purchase of a computer. To do so, you select the appropriate template. The document opened contains the standard invoice text and has a proper layout according to your company's corporate design. In addition, some data from the case are already filled in: The letterhead states the name and address of the main contact (who received the

computer), and the details of the purchase (purchased item and price) are mentioned in the text body. This way, you don't need to type everything but you can directly proceed to reviewing the document.

#### Requirements for using document templates

Your computer has to meet the following requirements to use document templates:

- Microsoft Windows operating system
- CM/Doc application installed
- Microsoft Word / OpenOffice application installed

 Ask your CM administrator for the supported Microsoft Windows, Microsoft Word and OpenOffice versions.

#### Installing CM/Doc

You need to install the CM/Doc application on your computer before starting to use document templates. To do so, please perform the following steps:

1. Go to the *Downloads* section of your [User profile](#).
2. Download the *CM/Doc Installer*.
3. Follow the instructions of the installation wizard to install CM/Doc on your computer.

If you use CM/Doc with OpenOffice, you need to configure the path to your OpenOffice installation:

1. If CM/Doc is not running yet, i.e., there is no CM/Doc icon in the system tray, start the CM/Doc application by selecting a document attachment.
2. Right-click the CM/Doc icon in the system tray and go to *Preferences -> Open Office*.
3. Select the location of your OpenOffice installation.

If you use CM/Doc with Internet Explorer or Microsoft Edge, please perform the following additional steps:

1. Open Internet Explorer.
2. Go to *Internet options -> Security -> Local Intranet*.
3. Click *Sites*.
4. Click *Advanced*.
5. Add the URL of the ConSol CM system to the *Local Intranet* zone.

If you use CM/Doc with Microsoft Edge, please perform the following additional steps:

1. Open a command line window as an administrator.
2. Execute the following command:

```
CheckNetIsolation LoopbackExempt -a -n="Microsoft.MicrosoftEdge_8wekyb3d8bbwe"
```

If you use CM/Doc with HTTPS, some additional steps might be required, depending on your browser. Please see [CM/Doc is not opened when using HTTPS](#) for details.

### Adding an attachment using CM/Doc

If CM/Doc is active in your system, you see the additional tab *Document*. The following figure shows the steps which you need to perform in the Web Client.

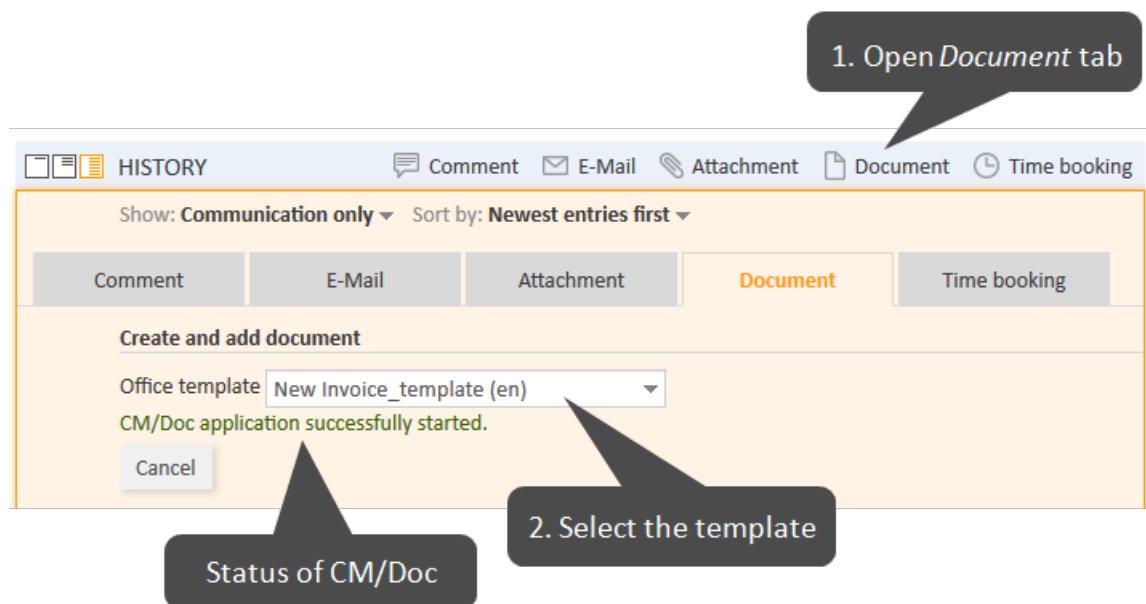


Figure 78: Adding an attachment using a document template

Please proceed as follows to upload an attachment using CM/Doc:

1. Open the *Document* tab.
2. Select the desired template from the *Office template* selector. If CM/Doc has not been running yet, it is started in the background. Below the selector, there is a message stating the status of CM/Doc.
3. The file is automatically opened in Microsoft Word or OpenOffice. Depending on the template, the file might already contain certain case or contact data, e.g., the name and address of the main contact or the case subject.
4. Edit the file and click *Save* in Microsoft Word or OpenOffice. The updated file is automatically added as an attachment to the case. You can find it both in the attachment section and in the history section.

### Editing an attachment created using CM/Doc

You can edit an attachment using CM/Doc. To do so, please proceed as follows:

1. Go to the history section of the case and locate the entry with the attachment.
2. Open the context menu of the attachment and click *Edit*. The document is opened in Microsoft Word or OpenOffice.

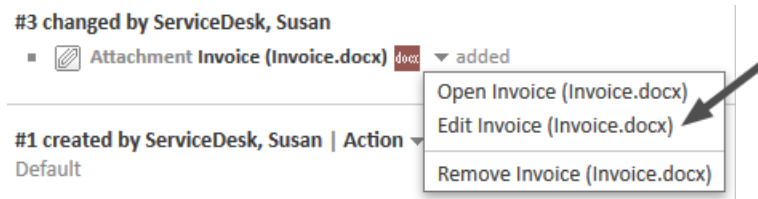


Figure 79: Link to edit an attachment using CM/Doc

3. Edit the document and click the *Save* button. The document is automatically uploaded to ConSol CM.

#### Notes on saving documents

Please bear in mind the following when you create or edit a document using CM/Doc:

- Please make sure to **only** use the *Save* command. Do not save the document using *Save as...* under a new name or to a new location. If you change name or location of the document, it cannot be added to the case as an attachment.
- There are two possible configurations for your CM system:
  - A new attachment is created every time you click the *Save* button.
  - A new attachment is created the first time you click the *Save* button. Every subsequent click on the *Save* button updates this attachment. This applies only if you do not close Microsoft Word or OpenOffice in between.

#### C.3.4.9 Time booking

You can book the time you spent working on a case to the case and assign those working hours to a project. To do so, click the *Time booking* link in the header of the history section. The background of the history section turns yellow to indicate that it is in edit mode. If the section is already in edit mode, you can also add a time booking by clicking the *Time booking* tab.

Figure 80: Adding a time booking

Fill out the duration of the time booking. There are two ways to do so:

- **Enter the duration manually (1)**  
Select the date from the *Starting from* field, enter the starting time (optional) and enter the *Duration*.

**i Data entry formats for the field *Duration***

**Proper** data entry formats for the field *Duration*:

- Plain numbers are automatically interpreted as minutes (e.g., 20 is interpreted as 20 minutes and 120 as 2 hours).
- Minutes can also be indicated by “m” or “min” (e.g., 20 m or 20 min).
- Hours are indicated by “h” (e.g., 2 h).
- The format 01:05 (one hour and five minutes) or 00:25 (25 minutes) is also possible.

**Improper** data entry formats for the field *Duration*:

- Combinations of hours and minutes (e.g., 2 h 25 min is not possible).
- Decimal numbers or fractions are not possible (e.g., 1,5 h or 1.5 h is not possible).

• **Choose an action (2)**

Select the action from the *or* field (below the *Starting from* field). The menu might show you for example the duration since you logged in (action *Login*) or since you started editing the case (action *Case edited*). The date, time and duration fields will be filled out automatically with the respective time period.

**i** If you cannot see the drop-down menu for action selection, it has been deactivated by your CM administrator. In this case, you need to enter the starting time and duration manually.

Now, you have to **choose a project (3)** from the drop-down list *Project*. You can enter a comment (optional).

**i** It is not possible to change or delete a submitted time booking, but you can correct an incorrect time booking by a correction booking. To do so, you create a normal time booking and add a “-” (minus) in front of the duration of the booking. The correction booking will subtract the booked amount of time from the **overall time** booked on the regarding day.

The new time booking is displayed in the [time booking report](#) in your user profile

**i** Depending on the individual configuration of your CM system, automatic time booking might be enabled in your Web Client. This means that the time you spend creating a case or working with a case (using the rich text editor to add comments or write emails) is automatically booked to the case.



### C.3.5 Additional assignees and approval processes

This chapter discusses the following:

- [Additional assignees](#)
- [Approval processes](#)

#### C.3.5.1 Additional assignees

Additional assignees are assignees who have a specific purpose, which is defined in your business process. Usually, an additional assignee has to carry out a certain task within the process or he has to be informed about the progress of the case. For example, additional assignees can be used in approval processes to assign the case to an approver if a contact refund exceeds a certain amount. Additional assignees have a function which indicates their role/task in the process.

The additional assignees of a case are displayed in the [additional assignees section](#). If there is at least one additional assignee, the assignee (if present) is displayed in this section as well. The assignee's icon has a little soccer ball and a red label *assigned* after his name. The additional assignees are sorted by their function and displayed below the heading corresponding to their function. If there is an [approval process](#) for this case, there can be various other symbols added to their icons.

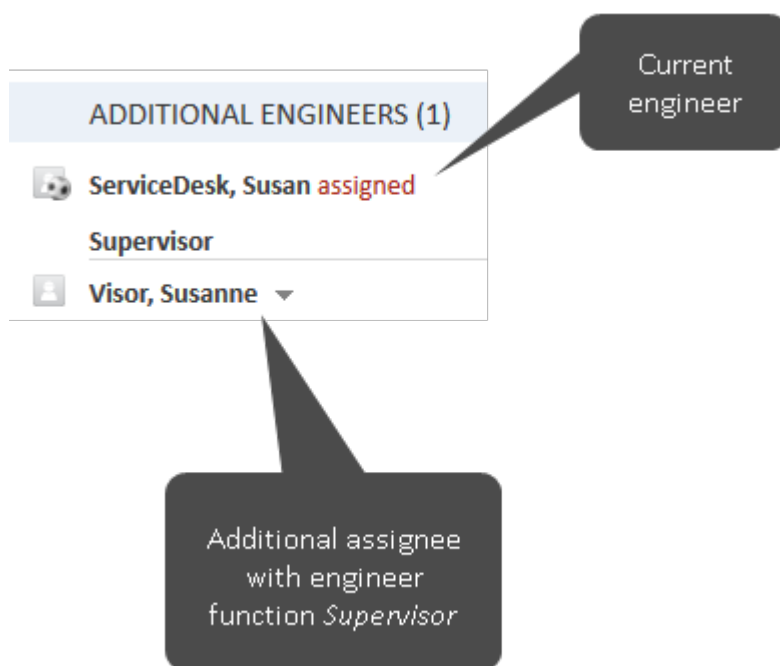



Figure 81: *Additional assignees*

#### Adding an additional assignee

You can manually add an additional assignee if you have the required permissions. Depending on the individual configuration of your CM system, additional assignees can also be added automatically during the business process.

To add an additional assignee, click the *Add* link in the upper right corner of the *Additional assignees* section and proceed as follows:

1. Select the user. You can either open the drop-down list or use the [Autocomplete Search](#) to limit the suggestions.
2. Select the function. Only the functions which are available for the user are displayed.

 You can also choose the function first to see only the users who have the selected function.

3. Add a note (optional).
4. Click *Add assignee*.

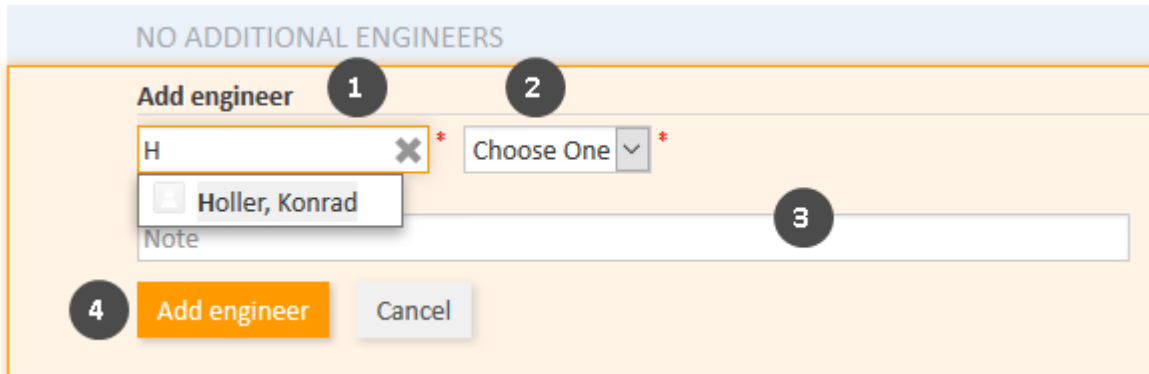



Figure 82: Adding an additional assignee

 The assignee can also be added as an additional assignee provided he has the required function.

#### Adding and editing the note of an additional assignee


You can add a note to the additional assignee by clicking the little arrow next to the assignee's name and clicking *Add note* in the context menu. If a note has already been added, the context menu entry is called *Edit note* and you can edit the existing note.

#### Assigning a case to an additional assignee

You can assign the case to the additional assignee by clicking the little arrow next to the assignee's name and clicking *Assign* in the context menu. The case is now assigned to the additional assignee, i.e., the additional assignee is now both the assignee of the case and the additional assignee with the given function. His icon is displayed with the little soccer ball.

#### Removing an additional assignee


To remove an additional assignee, click the little arrow next to the assignee's name and select *Remove* from the context menu. Click *Yes* to confirm the removal of the additional assignee. You cannot undo the removal once you confirmed it.

 Removing an additional assignee might interrupt the business process, e.g., if the case is waiting for an approval and you remove the approver. Please only remove an additional assignee if you are sure that it is not needed anymore.

### C.3.5.2 Approval processes

Some business processes include approval processes where an authorized person, i.e., the **approver**, takes a decision regarding the further processing of a case. For example, compensations to contacts above a certain amount might need the approver's authorization.

The approver needs to be added as an additional assignee. This can either happen automatically, e.g., the assignee clicks the workflow activity *Request approval* and the system automatically adds the approver as an additional assignee, or manually, e.g., the assignee adds an additional assignee with the function *Approver*. The approver takes a decision, i.e., he either approves the request or declines it, and the assignee continues working on the case according to this decision.

 The approver can take the decision either directly in the Web Client by clicking on the corresponding workflow activity or via email. It depends on the individual configuration of your CM system which options are available.

Depending on the status of the approval process, the approver's icon can have one of the following symbols:

	Decision is still pending
	Approved
	Declined

### C.3.6 Relations to cases and resources

You can create relations between cases ([case relations](#)) and between cases and resources ([resource relations](#)).

Case relations allow you to link several cases concerning a similar problem. For example, you can link two cases about the same problem with a printer.

Resource relations allow you to link your cases to the resources which they concern. For example, you can link an incident case to the printer which caused the problem or a service case to the contact's SLA.

#### C.3.6.1 Case-case relations

This chapter discusses the following:

- [Introduction](#)
- [Types of case relations](#)
- [Adding a case relation](#)
- [Deleting a case relation](#)
- [Jumping to a related case](#)

##### Introduction

Case-case relations (for greater readability called *case relations* in this section) are used to create links between cases. They are displayed in the [section for related cases](#) (headline *Relations*). Case relations can be used to link similar cases as a reference or to create dependencies. For example, you can link a case about a problem with a printer to another case concerning a similar problem or to several slave cases representing tasks to fix the problem. The available case relations depend on the individual configuration of your CM system.

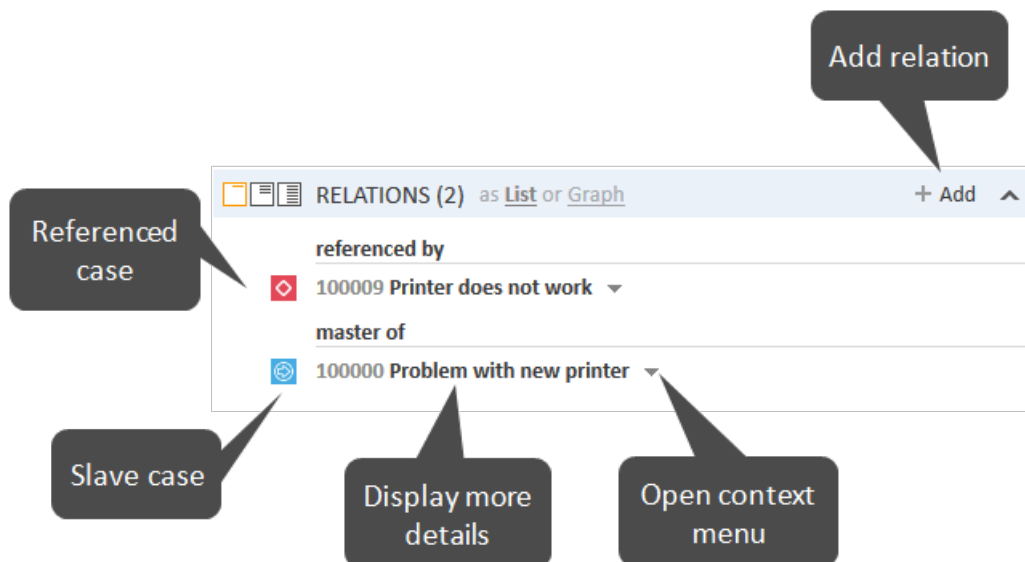


Figure 83: Examples of case relations

**i** You can also show a [relation graph](#) in this section.

## Types of case relations

There are two kinds of case relations in the Web Client:

- **Reference relations**

These are non-hierarchical relations. A case can have any number of *reference* relations.

**Example:** You can create a reference relation between two support requests concerning a similar problem.

- **Hierarchical relations**

These relations have two hierarchical levels. Within one hierarchical relation, the case can be either the upper level or the lower level.

**Example:** Several child cases are automatically created for a case which involves several tasks to be completed by different teams simultaneously.

There are two types of hierarchical relations:

- **master-slave relations**

The upper level of this relation is called *master case*, the lower level of this relation is called *slave case*. This relation is created manually. A case can have only one master case but any number of slave cases.

- **parent-child relations**

The upper level of this relation is called *parent case*, the lower level of this relation is called *child case*. This relation is created automatically. You cannot add or remove this kind of relation. A case can have only one parent case but any number of child cases.

The type of relation established between the current case with respect to the linked case is indicated by a red headline:

- **referenced by**

There is a reference relation between the two cases.

- **master of**

There is a master-slave relation where the current case is the master of the linked case.

- **slave of**

There is a master-slave relation where the current case is the slave of the linked case.

- **parent of**

There is a parent-child relation where the current case is the parent of the linked case.

- **child of**

There is a parent-child relation where the current case is the child of the linked case.

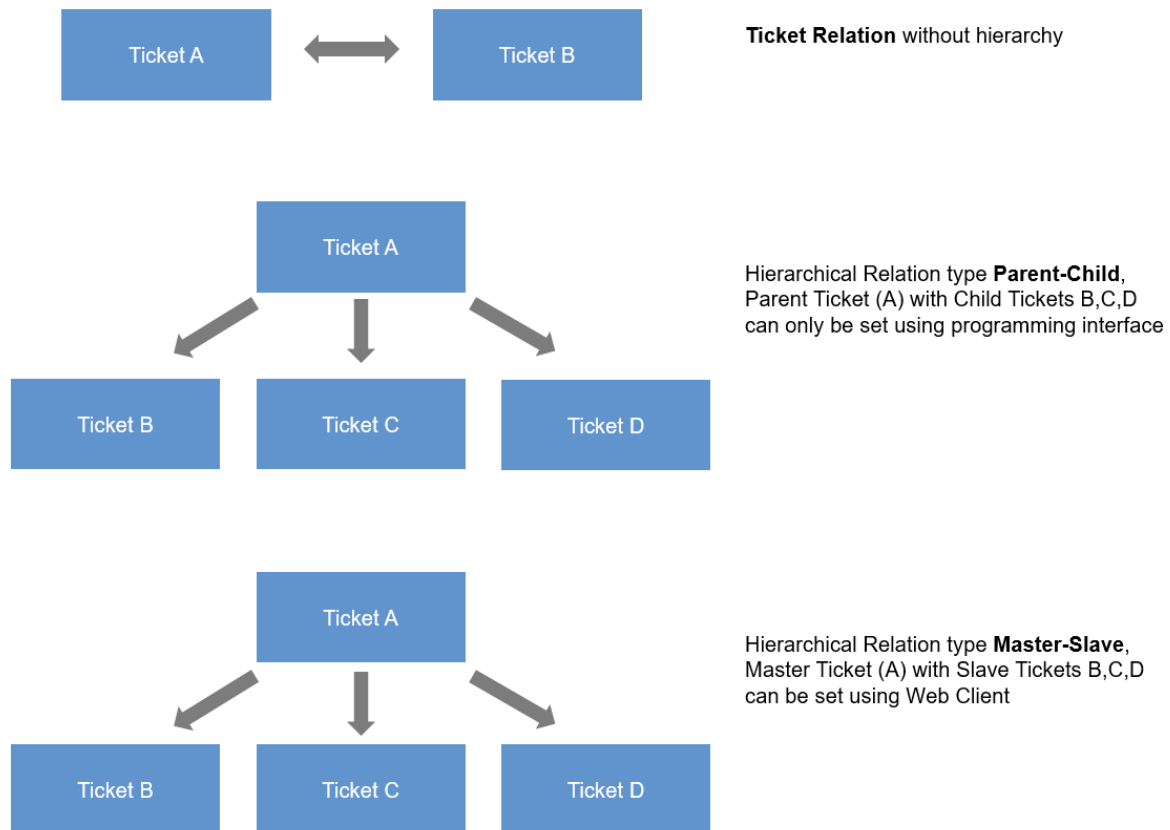


Figure 84: Case relations in ConSol CM

### Adding a case relation

Please proceed as follows to add a new case relation.

1. Click the *Add* link in the upper right corner of the section for related cases to add a new case relation. The background of the section turns yellow to indicate that it is in edit mode.
2. Use the [Autocomplete Search](#) to find the case which you want to link. Click the desired case to select it.
3. Choose the type of relation. You can click the *Back to search* button to return to the Autocomplete Search and select another case. Optionally you can add a note. Click *Add relation* to save the relation.



#### Note on selecting the type of relation

The type of relation always refers to the case that you select from the Autocomplete Search. Therefore, if you want the current case to be the master of the other case, you have to select *Slave*.

1 NO RELATIONS + Add ^

2 Add relation  
Ticket name or subject Printer X Cancel  
100009 Printer does not work  
100000 Problem with new printer

3 Add relation  
Add 100009 Printer does not work to this tickets  
as Reference v  
Note Reference  
Master  
Slave  
Add relation Cancel Back to search

Figure 85: Adding a case relation

**i** You can also [add a case relation via drag-and-drop](#). Drag the icon of the desired target case from the case list, workspace, or favorites for this purpose. Once you have dropped the case icon into the section for related cases, this section is opened in edit mode. The target case is already selected and you can directly select the type of relation.

#### Deleting a case relation

To remove a case relation, click the little arrow next to the name of the related case and select *Remove* from the context menu. Then, click *Yes* to confirm the removal of the relation. Note that the relation is also removed from the page of the related case. You cannot undo the removal once you confirmed it.

#### Jumping to a related case

To open the related case in your main working area, click the little arrow next to the name of the related case and select *Jump to case*.

### C.3.6.2 Case-resource relations

This chapter discusses the following:

- [Introduction](#)
- [Adding a resource relation](#)
- [Editing the note of a resource relation](#)
- [Switching to the related resource](#)
- [Deleting a resource relation](#)

## Introduction

Case-resource relations (for greater readability called *resource relations* in this section) can be used to link cases to resources. For example, you can link an incident case to the printer which caused the problem or a service case to the contact's SLA. Resource relations are displayed in the [section for related resources](#) of the case. If no resource relations are set for the case, the section is collapsed. You can expand it to add a relation by clicking the arrow icon in the section header. If there is at least one relation, the *Show* filter is displayed, where you can choose to see all possible relations (*All relations*) or only the relations which are set for the case (*Only assigned relations*).

The layout depends on the selected visibility setting. The following figure shows the section for related resources with the visibility setting *Extended*. Each resource category is displayed in a box which contains the relations configured for this resource category. The resources are arranged below the name of the relation. Click the relation name to display the related resources. You can display further details about the resource by clicking the resource name. Click the small arrow button next to the resource name to open the context menu of the resource which allows you to delete the relation and jump to the resource page.

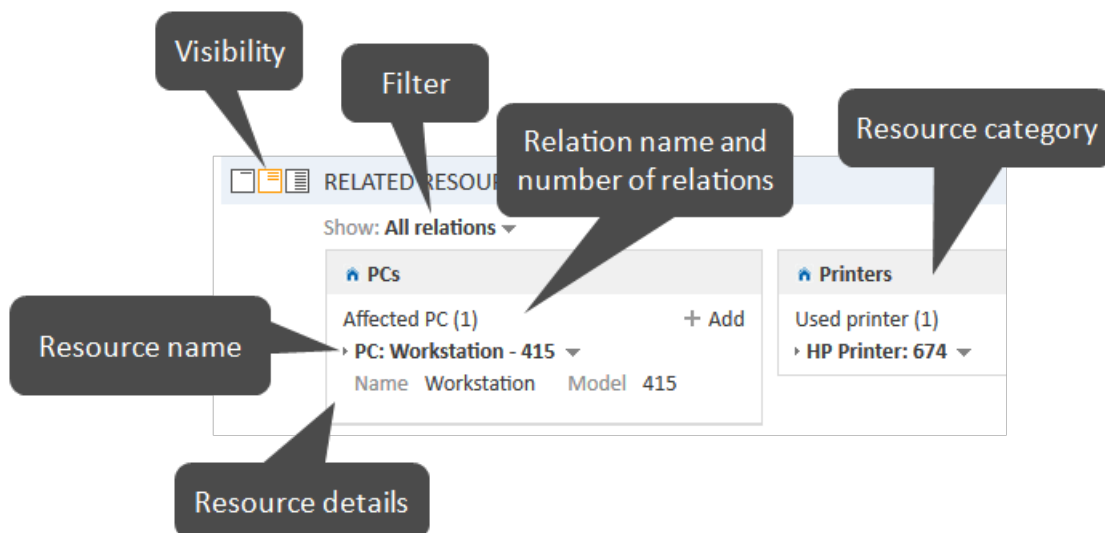


Figure 86: Resource relations

**i** You can also show a [relation graph](#) in this section.

You can create relations based on the relation models which are configured in your CM system. The following is defined for each relation model:

- The **resource type**, i.e., which kind of resources can be linked to the case.
- The **process** which the cases have to be in.
- The **cardinality** of the relation, i.e., if you can link several resources of the same resource type to the case, and if the same resource can be linked to several cases.
- The availability of the *Note* field.



**i** Resource relations are only available if your CM system uses CM/Resource Pool. The available relations and their configuration depend on the individual configuration of your CM system.

### Adding a resource relation

Please proceed as follows to add a new resource relation.

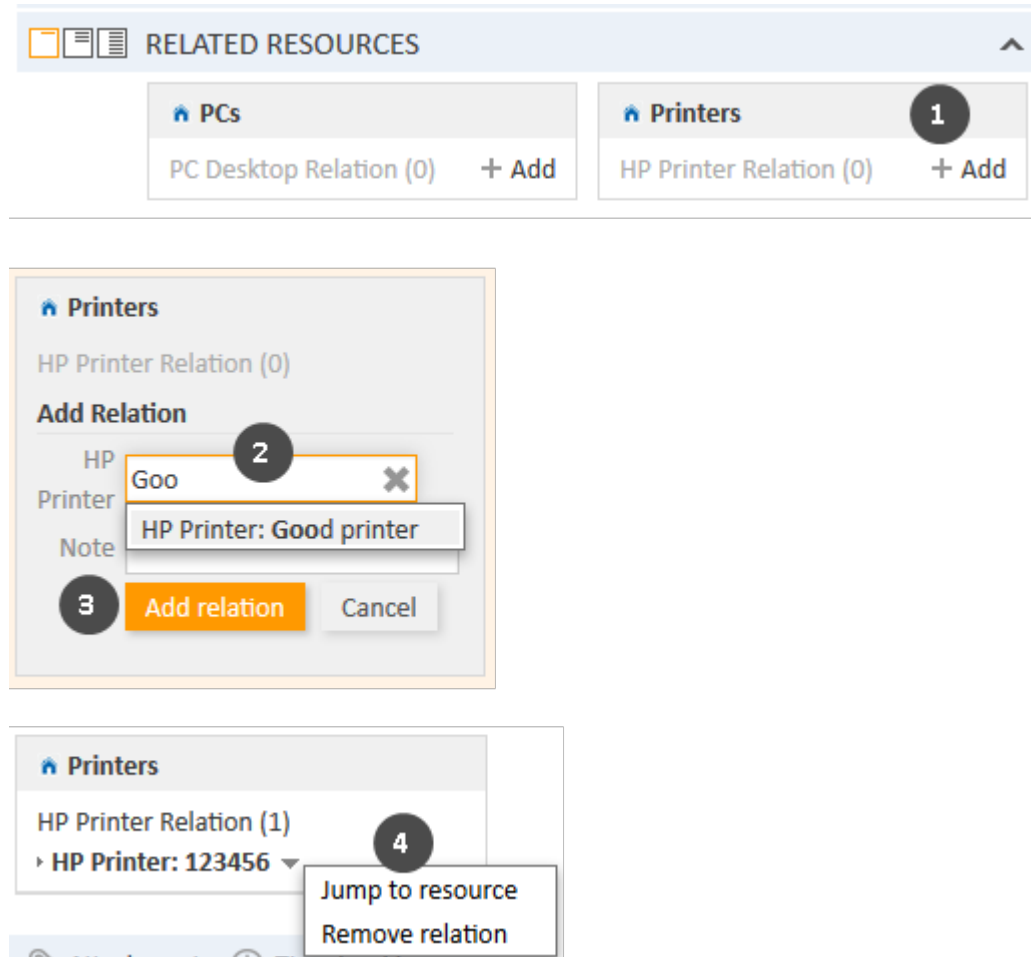


Figure 87: Adding a resource relation

1. Click the *Add* link next to the required relation name.
2. Start typing the name of the resource and select the desired resource from the suggestions of the [Autocomplete Search](#). Optionally, you can enter a note.
3. Click *Add relation*.
4. The resource is now linked to the case. You can click the link with the resource name to display further details about the resource. The amount of detail varies depending on the selected visibility level.

### Editing the note of a resource relation

Click *Edit* next to *Note* to edit the relation's note. The *Edit* link is only displayed if you have selected the visibility level *Detail* (see [visibility level](#)).

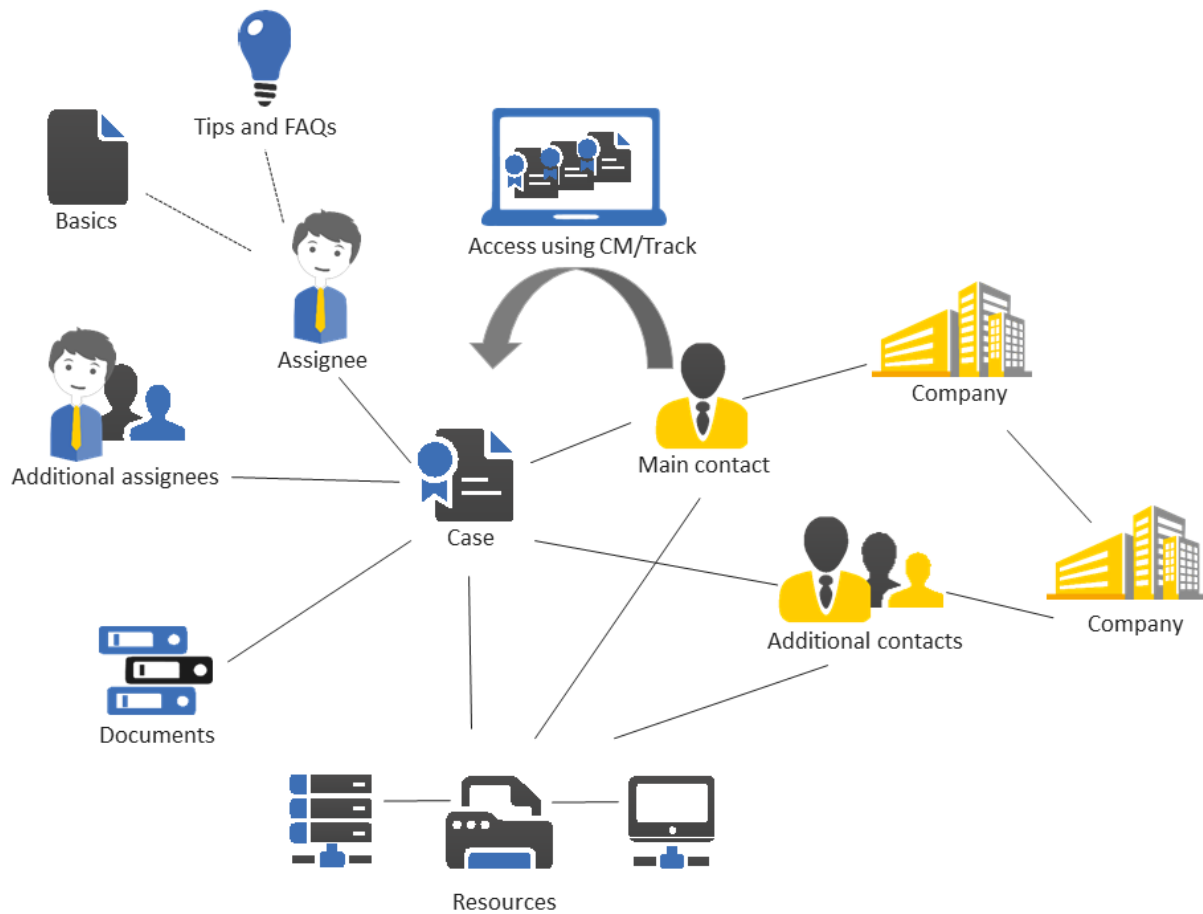
### Switching to the related resource

You can view the corresponding [resource page](#) by clicking *Jump to resource* in the context menu.

### Deleting a resource relation

Click *Remove relation* in the context menu to delete the relation. Then, click *Yes* to confirm the removal of the relation. Note that the relation is also removed from the page of the related resource. You cannot undo the removal once you confirmed it.

## D - Contacts



This section provides you with all the information you need to work with contacts.

The meaning of the terms **contact**, **company**, **person**, **customer group**, and **contact data model** within ConSol CM, the structure of a contact page and the display settings for them:

- [Basic knowledge about contacts](#)
- [Structure of a contact](#)
- [Display settings](#)

All information about working with contact data, from creating new contacts and contact relations to deactivating and deleting contacts:

- [Working with contacts](#)


## D.1 Basic knowledge about contacts


### D.1.1 Terms and definitions

#### D.1.1.1 Contact

Contact is the generic term which designates the person or object that gave the reason for creating a case. The contact represents the external side of a case. A case always needs to have a contact as **main contact** (also called **main contact**). A contact always belongs to a [customer group](#). Depending on the [contact data model](#), a contact can either be:

- a **company**  
The upper hierarchical level of a two-level contact model. A company can have several persons.
- a **person** (also called **person**)  
The lower hierarchical level of a two-level contact model. A person can only belong to one company.

 The terms **company** and **person** have the sole purpose of illustrating the hierarchical model. A company does not have to be a real company, and a person does not have to be a real person. They could be machines, products, or any other entity managed in ConSol CM. It depends on the individual configuration of your CM system which entities are managed as companies and persons.

 It depends on the configuration of your ConSol CM system if a contact is called *contact* within your system. Contacts might be called *persons*, or similar in your Web Client. In this manual, the terms *contact*, *company* and *person* will be used for your convenience.

#### D.1.1.2 Contact data model

The contact data model is the definition of the contact. There are two types of contact data models:

- **One-level contact data model**  
Contains either companies or persons, but not both of them.
- **Two-level contact data model**  
Contains companies on the upper hierarchical level and persons on the lower hierarchical level.

The contact data model also determines the available data fields and possible relations. There can be several contact data models within one CM system.

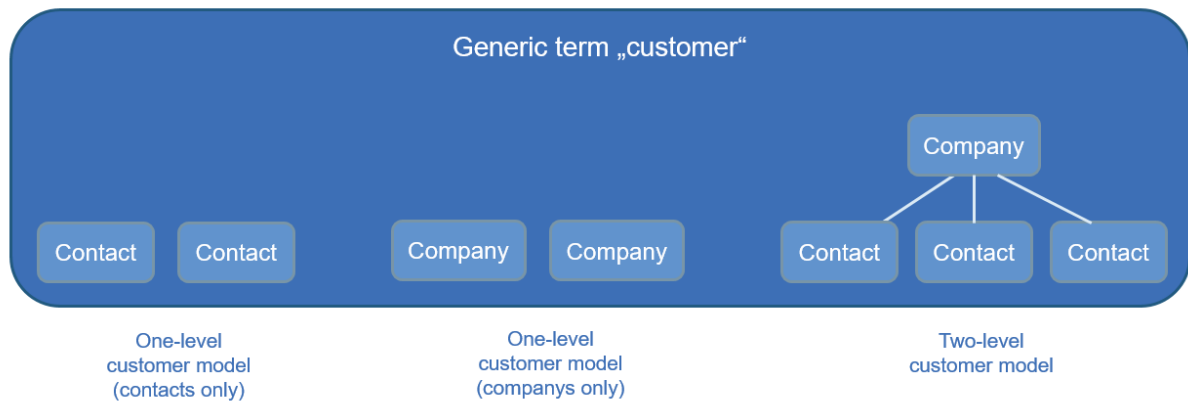


Figure 88: *Explanation of the terms: contact, company, and person*

### D.1.1.3 Customer group

The real contacts, which are created using the Web Client, always belong to a customer group. The customer group determines which contact data model is used for its contacts, i.e., which data fields are available and which relations and activities are possible for the contacts. One CM system can have several customer groups to manage different kinds of contacts within the same CM system. Users get access to contact data by customer group. They need at least read permissions for the customer group in order to see cases whose main contact belongs to this customer group.



Each CM system uses customized customer groups and data models. Therefore, the available customer groups, hierarchical levels for contact objects, data fields, relations, and activities depend on the individual configuration of your CM system.

## D.2 Structure of a contact

A contact page contains the contact data and additional information about this contact. Depending on the type of contact, there are *person pages* and *company pages*. They can have up to nine sections:

- [Header \(1\)](#)
- [Details \(2\)](#)
- [Calendar \(3\)](#)
- [Cases \(4\)](#)
- [Persons \(5\)](#)
- [Comments and attachments \(6\)](#)
- [Related contacts \(7\)](#)
- [Related resources \(8\)](#)
- [History \(9\)](#)



The availability of the sections, their order, their headlines and whether they are collapsed or expanded by default depend on the individual configuration of your CM system.

## D.2.1 Example

**1** Company Edit Create ticket Deactivate Transfer data Print Delete

**2** **Spaceship Ltd** Reseller  
Company name Spaceship Ltd

**3** DETAILS Edit ^

**4** **Service Contract Data** Internal responsibilities

Service level Gold  
Contract start 9/10/18

**5** CALENDAR + Add appointment Refresh ^

**6** TICKETS (2) as [List](#) or [Graph](#) ^

Show: **Tickets of this company** ^ Status: **Open tickets** ^

Engineer	Main contact	Name	Subject
Sarah Service Desk	Spaceship Ltd	100011	Printer not functioning properly
	Spaceship Ltd	100010	Monitor problem

**7** PERSONS (2) as [List](#) or [Graph](#) + Add ^

**8** **Person**

@ Skydiver, Mike

@ Skydiver, Mia

**9** NO COMMENTS AND ATTACHMENTS Comment Attachments ^

**Comments** Attachments

**New**

Click here to add a comment

**List of comments**

No comments added yet

**7** NO RELATIONS + Add ^

**8** RELATED RESOURCES (2) as [List](#) or [Graph](#) ^

Show: **Only assigned relations** ^

Printers	PCs
Reseller sells this printer (1) <span>+ Add</span>	Desktops (1) <span>+ Add</span>

**9** HISTORY ^

9/3/18 10:00 changed by Susan ServiceDesk

- Contract start changed from 3/29/17 to 9/10/18

Figure 89: Sections of a company page

## D.2.2 Sections

**i** Please note that the different sections always are used for the purpose stated below, but the section headline might differ. The number in brackets next to the section headline indicates how many data entries this section contains.

### D.2.2.1 Header (1)

The section headline, per default, is *Company* for company pages and *Person* for person pages. It contains the basic contact data. The contact name is displayed in bold font. On its left, the contact icon is displayed. Depending on the individual configuration of your CM system, there can be several icons for different types of contacts and customer groups. The buttons provide access to several functions, see [Managing contacts](#). Next to the contact name you see the name of the customer group which the contact belongs to.

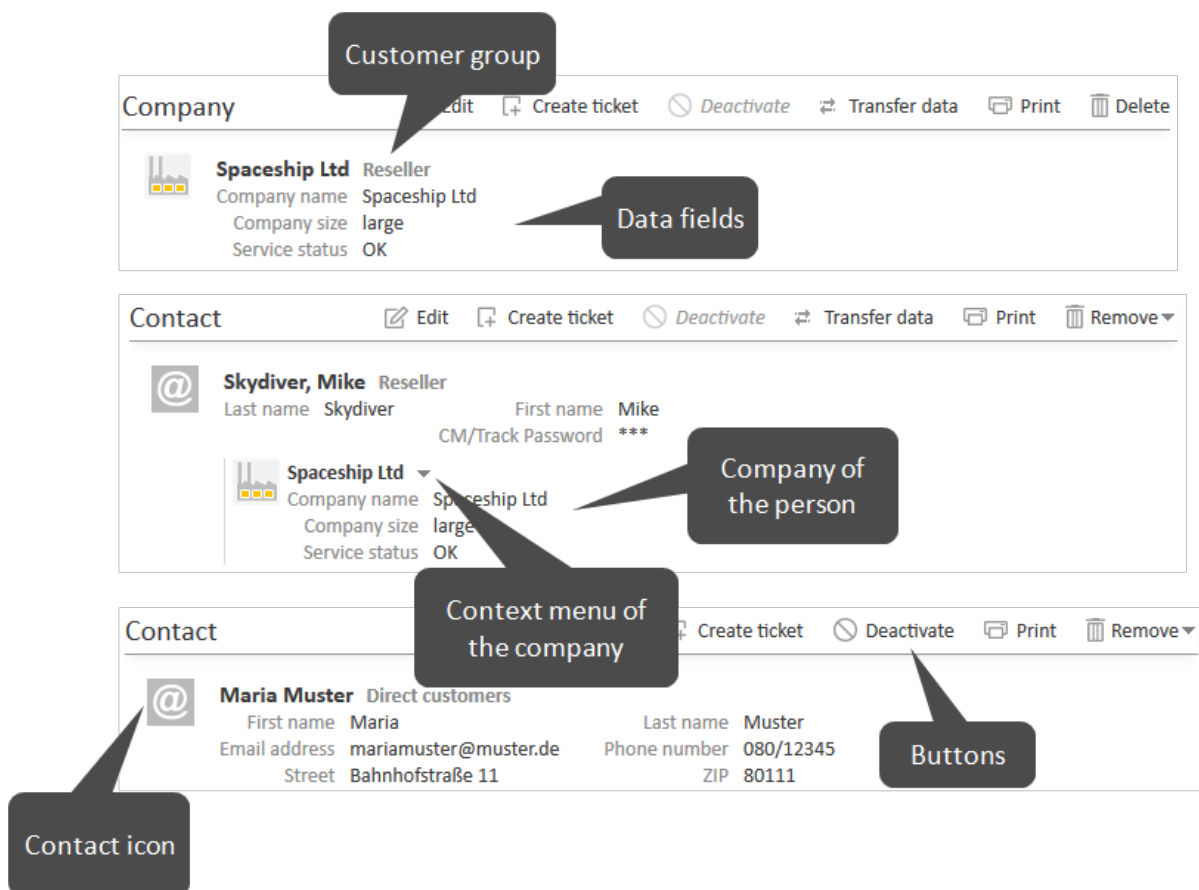


Figure 90: Header sections of contact pages

### D.2.2.2 Details (2)

The section headline is usually *Details*. This section contains additional data fields with contact data. Each group has its own tab allowing you to access the data. Click the tab heading to switch to the group. To edit the group data, click the *Edit* link on the right (see [Editing contact data](#)).



### D.2.2.3 Calendar (3)

The section headline is usually *Calendar*. This section shows the integrated calendar. It depends on the configuration of your individual CM system if the calendar feature is available. You can add an appointment or refresh the calendar using the links provided on the right. The calendar can be useful when you communicate with a contact: You see your own availability at a glance, so you can quickly schedule a phone call with the contact. Furthermore, you can directly add it as an appointment to your own calendar.

### D.2.2.4 Cases (4)

The section headline may be *Cases*, *Cases*, *Calls*, or whatever cases are called in your CM system. The number of cases found with the current filter is stated in parenthesis. It contains a table listing all the cases linked to the contact. If there is a column containing the case's main contact, you can click the name of the contact, which is a link, to open the respective contact page. In the same way, there can also be a column containing a link to the case. If you click another column, the case preview is opened within the cases table. You can then open the case or switch to the preview of the next case in the list, see the following figure.

Depending on your system configuration, there might be two filters below the column headers. You can use the *Assignee* filter to display only the cases which are assigned to a certain user, only the assigned cases, or only the unassigned cases. The *Process* filter allows you to select the process to display only cases which are in a certain process.



The filters are only displayed if the table has more than a defined number of entries. This number is a system-specific configuration. Please ask your CM administrator for exact information.

You can change the table columns and navigate between the pages. Please see [Adjusting tables](#) for further information. You can sort the case table by clicking a column header. This setting is saved. By default, i.e. if you have not defined a sorting, the cases are sorted in descending order by creation date. In addition, you can open the case preview which always shows the case's last comment or email.

The following features are available:

The screenshot shows a web interface for managing tickets. At the top, there's a header 'TICKETS (4)' with a dropdown menu (1) and a 'Graph' button (2). Below this, there's a filter section 'Show: Tickets of Contact' (3) and 'Status: Open tickets'. A table lists tickets with columns for 'Main Customer', 'Name', and 'Subject'. The first row shows '@ Skydiver,Mia' with ID 100009 and subject 'Printer does not work'. The second row, highlighted with an orange border, shows 'Mr Luke Skywalker' with ID 100002 and subject 'Layout issues when printing'. To the left of the table is a sidebar with icons for settings (4), expand/collapse (5), open in new tab (6), switch to next result (7), switch to previous result (8), and open previous attachment (9). The main content area shows a preview of the selected ticket, including the email subject 'Latest email from Luke Skywalker <luke@consol.de>' (5), date '2/20/17', time '5:05 PM', and attachments (2). The email body text is visible. At the bottom, there are two more rows in the table, one with ID 100001 and subject 'Test SpecTasks', and another with ID 100000 and subject 'Problem with new printer'. Callouts 10, 11, and 12 point to the bottom of the table, the 'Mr Luke Skywalker' row, and the 'Problem with new printer' row respectively.

Figure 91: Cases section on a contact page

- Choose the contact of the cases to be displayed (1)
- Choose the status of the cases to be displayed (2)
- Collapse the section (3)
- Open the column configuration (4)
- Show more details in the preview (5)
- Open the case in a new browser tab (6)
- Switch to the preview of the next result (7)
- Open a preview of the previous attachment (only attachments included in the last comment or email) (8)
- Open a preview of the next attachment (only attachments included in the last comment or email) (9)
- Open the case's main contact (10)
- Open the case (11)
- Open the preview for the case (12)

 You can also show a [relation graph](#) in this section.

#### Displayed cases on a company page

The displayed cases depend on your selection in the two filters:

- **Show**
  - **Cases of Company:** Cases where the company is either the main or an additional contact.
  - **Cases of Company (main contact only):** Cases where the company is the main contact.
  - **Cases of Persons:** Cases where a person of the company is the main contact or an additional contact.
  - **Cases of Company and Persons:** Cases where the company or a person of the company is the main contact or an additional contact.
- **Status**
  - Open cases
  - Closed cases
  - Open and closed cases

#### Displayed cases on a person page


The displayed cases depend on your selection in the two filters:

- **Show**
  - **Cases of Person:** Cases where the person is either the main or an additional contact.
  - **Cases of Person (main contact only):** Cases where the person is the main contact.
  - **All Cases of Company:** Cases where the company of the person, the person itself or another person of the company is the main or additional contact.
- **Status**
  - Open cases
  - Closed cases
  - Open and closed cases

#### D.2.2.5 Persons (5)

This section only exists on company pages. The headline usually is *Persons*. It contains the persons which belong to the company. The number of persons is stated in parenthesis. If you click a person the respective person page is opened automatically. Click the *Add* button to create a new person for this company, please see [Creating a person on the company page](#) for further information.

You can change the table columns and navigate between the pages. Please see [Adjusting tables](#) for further information.

 You can also show a [relation graph](#) in this section.

### D.2.2.6 Comments and attachments (6)

The section heading is *Comments and Attachments*. This section has two tabs showing the comments and attachments added to the contact. The number in the headline refers to the sum of both comments and attachments. You can only see this section if you have the required permissions. Please see [Editing comments and attachments](#) for further information about working with comments and attachments.

### D.2.2.7 Related contacts (7)

The section heading can be *Relations*, *Related companies* or something similar. It contains the contact relations existing between this contact and other contacts (both companies and persons). Contact relations can be used to indicate for example that a company sells products to another company. The contact relations are arranged below the different types of relation (red font). After the name of the contact relation, the customer group and the type of contact (company or person) is displayed. The available relations depend on the individual configuration of your CM system.

Please see [Contact-contact relations](#) for further information about working with contact relations. You can change the table columns and navigate between the pages. Please see [Adjusting tables](#) for further information.

 You can also show a [relation graph](#) in this section.

### D.2.2.8 Related resources (8)

The section headline is usually *Related Resources*. This section shows the resources linked to the contact. It depends on the configuration of your individual CM system if resources are available. You can set the [visibility level](#) to determine how much information you want to see about each related resource. Please see [Contact-resource relations](#) for further information about working with resource relations.

 You can also show a [relation graph](#) in this section.

### D.2.2.9 History (9)

The section headline is usually *History*. This section contains the contact history which shows all changes which were carried out for this contact. This includes changes to data fields, and the addition and removal of comments, attachments, relations and resources. The history section contains the date and time of the change, and the name of the user who carried out the change. The latter can also be a technical name in case of automatic changes.

## D.3 Display settings

This chapter discusses the following:

D.3.1 Expanding and collapsing sections .....	173
D.3.2 Visibility level .....	174
D.3.3 Adjusting tables .....	175
D.3.4 Background color of the contact page sections .....	175

### D.3.1 Expanding and collapsing sections

The contact page sections, except for the header, can be hidden, collapsed or expanded. If a section is collapsed you only see the section heading but not the content of the section. You can expand the section by clicking the down arrow on the right. To collapse a section and hide its content, click the up arrow. Your CM administrator determines whether contact page sections are hidden, collapsed, or expanded by default. You can collapse and expand sections while you are working with a contact but the default setting will be restored when you switch to another contact.

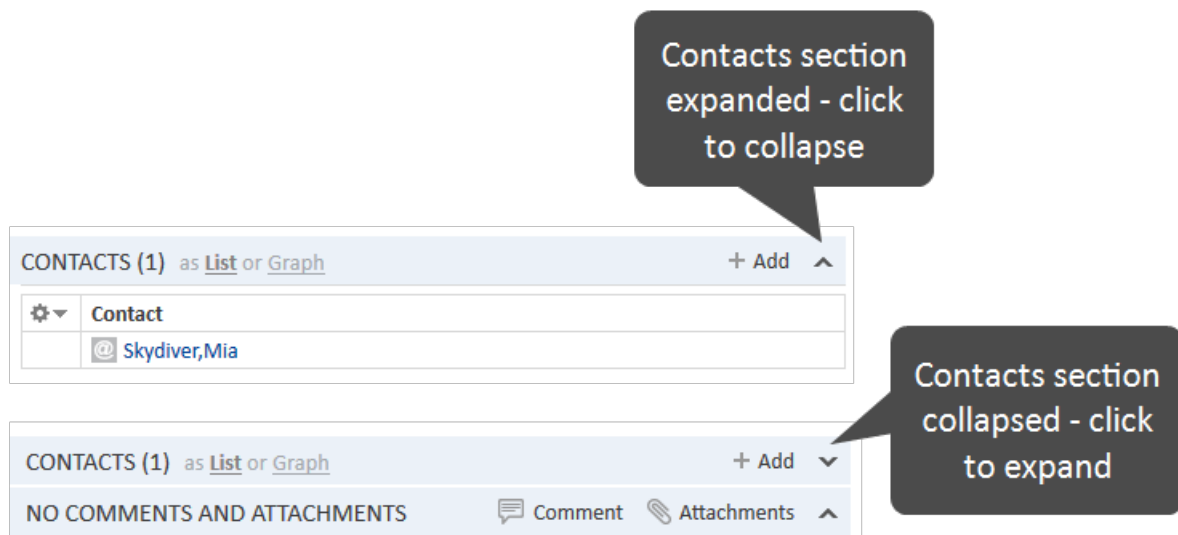


Figure 92: Expanding and collapsing contact page sections

### D.3.2 Visibility level

The visibility level determines the degree of detail of the information displayed in a contact page section. It can be set only for the section for related resources.

There are three visibility levels:

- **Basic**  
Basic degree of detail
- **Extended**  
Extended degree of detail
- **Detail**  
Maximum degree of detail

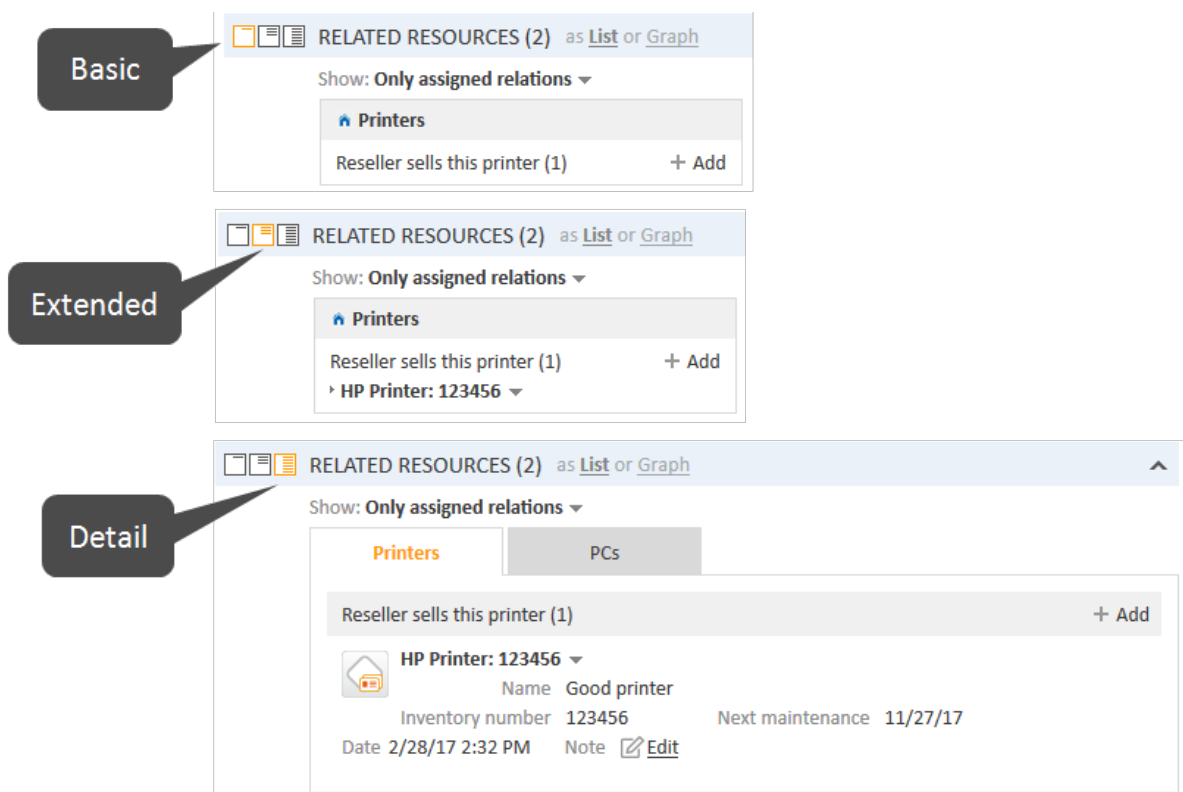


Figure 93: Setting the visibility level

### D.3.3 Adjusting tables

Some contact page sections contain tables. You can adjust the table columns by clicking the little arrow next to the wheel icon. To remove a column, click the cross next to the column name. To add new columns, click in the white space next to the names of the displayed columns to see a list of all available columns, or start typing the column name, and click one of the suggested columns. Click **OK** to apply your changes. You can rearrange the columns within the table by dragging-and-dropping the column to the desired position.

If the list exceeds a predefined number of entries, it is split among several pages. You can select the number of entries per page at the bottom of the table and click the arrow buttons and page numbers to navigate the table.

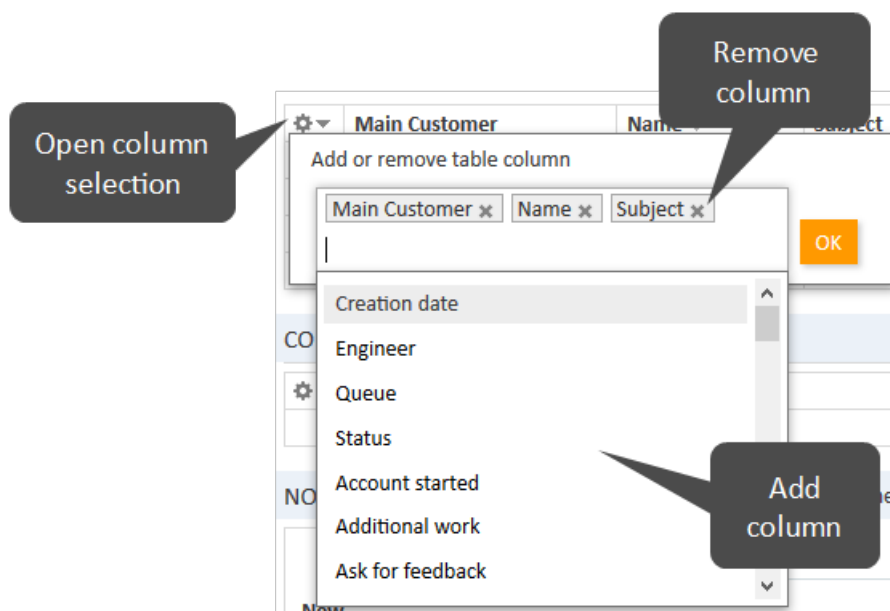


Figure 94: Selecting the table columns on a contact page

**i** ConSol CM saves your column selection. Even if you leave the contact page or log out of the system, the columns will be displayed as defined when you open the contact page again.

### D.3.4 Background color of the contact page sections

As soon as you start editing contact data, e.g., changing data in the details section, adding a comment, adding a relation, the section background turns yellow to indicate that the section is in edit mode. Once you saved your changes, or canceled the operation, the background turns gray again to indicate that the section is in view mode.

## D.4 Working with contacts

Some users have roles which allow them to carry out certain activities on contacts. Here are some examples of tasks you might perform:

- You create a new contact, see [Creating a contact](#).
- You edit the data of an existing contact, see [Editing contact data](#).
- You deactivate, delete or anonymize a contact, see [Making contacts unavailable](#).
- You add a comment or attachment to a contact, see [Editing comments and attachments](#).
- You perform an action for the contact, see [Performing contact activities](#).
- You add a relation to another contact or to a resource, see [Relations to contacts and resources](#).

It depends on your permissions whether you are allowed to perform one or several of these tasks. If you do not have the required permissions you can skip this chapter as it does not apply to you.

There are several places where you can work with contacts:

- All actions are possible on the contact page.
- Within a case, you can edit contact data and activate/deactivate a contact.



Changes to contacts are **global changes**. It does not matter whether they are done on the contact page or in a case, they always apply to the **whole CM system**. This means that the changes are visible in every case the contact is added to and on the contact page.

If you have access to more than one customer group, you can limit your work to a specific customer group, see [Customer group filter](#).



## D.4.1 Creating a contact

If you have the required permissions, you can create a new contact in several places:

- In the main menu, see [Creating a contact from the main menu](#).
- In a case, see [Creating a contact within a case](#).
- On the company page, see [Creating a person on the company page](#).

In addition to these standard locations, it might be possible to create contacts using activities, e.g., on a resource or contact page. This depends entirely on the individual configuration of your CM system.


### D.4.1.1 Creating a contact from the main menu

Figure 95: Creating a contact using the main menu (two-level contact model)

Please proceed as follows to create a new contact using the main menu:

1. Click *Create contact* in the main menu.
2. Select the customer group:
  - a. Limit the customer group globally throughout the system by selecting the desired customer group in the customer groups filter.
  - b. Click the tab of the desired customer group.


3. Provide the company (only two-level contact models):
  - a. Find an existing company by entering the company name. The Autocomplete Search will display matching companies as soon as you start typing the company name, see [Auto-complete Search](#).
  - b. Click the *Create* link to start creating a new company. Fill out the data fields and click *Create*.
4. Create the new person by filling out data fields and clicking *Create*. The person will be linked automatically to the company you selected or created above.

 If you work with a customer group with a one-level contact model, you skip step 3 as you only see one section, which corresponds either to the person or company.


#### D.4.1.2 Creating a contact within a case

You can create a new contact within a case. You can only create contacts in customer groups which are assigned to the current process of the case. Therefore the available customer groups depend on the case's process and on your selection in the customer groups filter. Please proceed as follows to create a new contact within a case:

1. Remove the existing case contact by clicking the *Change* link in the contact's context menu (only existing cases, see [Changing the main contact](#)).

 If you are creating a new case, the [contacts section](#) of the case is empty and you can directly start the creation of a new contact.

2. Select the customer group:
  - a. Limit the customer group globally throughout the system by selecting the desired customer group in the customer groups filter.
  - b. Click the tab of the desired customer group.
3. Provide the company (only two-level contact models):
  - a. Find an existing company by entering the company name. The Autocomplete Search will display matching companies as soon as you start typing the company name, see [Auto-complete Search](#).
  - b. Click the *Create* link to start creating a new company. Fill out the data fields and click *Create*.
4. Create the new person by filling out data fields and clicking *Create and select*. The person will be linked automatically to the company you selected or created above.

 If you work with a customer group with a one-level contact model, you skip step 3 as you only see one section, which corresponds either to the person or the company.

### D.4.1.3 Creating a person on the company page

In a [two-level contact model](#) you can create a new person for an existing company on the company page. Please proceed as follows:

1. Open the company page.
2. Click the *Add* link in the [persons section](#).
3. Fill out the data fields and click *Save changes*. The new person will be linked automatically to the company.

The screenshot shows the 'Company' page for 'Spaceship Ltd' (Reseller). The page includes details like 'Company name', 'Company size' (large), and 'Service status' (ok). Below this is a 'CONTACTS (1)' section with a '+ Add' link. An arrow points from this link to a modal form for creating a new contact. The modal form contains fields for 'Last name', 'First name', 'E-mail', 'Phone', 'CM/Track Login', and 'CM/Track Password'. There is also a 'VIP?' checkbox and 'Save changes' and 'Cancel' buttons.

Figure 96: Creating a person on the contact page

### D.4.1.4 Filling in the data fields

Please see [Data fields](#) to learn how to fill in the standard data fields.

**i** Some of the fields might activate the [Autocomplete Search](#) to check if there is already a matching contact. In this case, you can select one of the suggestions to open the respective contact page. Alternatively, you can ignore the suggestions and create the contact with the desired data

Nevertheless, if [CM/Track](#) is active in your system, there are some special data fields:

- **CM/Track login data (1)**

The names of these data fields depend on the individual configuration of your CM system, but

there is usually one field for the user name and one field for the password. Fill out these fields with the values which the contact should use to access CM/Track.



The user name has to be unique. Every contact in your CM system needs to have a different user name. For security reasons, the password is displayed as dots and its value is not written to the case history.

- **CM/Track user profile (2)**

This drop-down list is called *Track user*. Select the user profile which should be used to grant access to CM/Track. If you don't make a selection here, the contact cannot use CM/Track.



The *Track user* field is only available if your system is configured for manual selection of the CM/Track user profile. If the field is not available, the user profile is assigned automatically or CM/Track is not used.



Your CM system can be configured to allow CM/Track access only for specific customer groups. In this case, the CM/Track login data fields may only be available in some of the customer groups.

**Contact**

@ Last name  First name

E-mail  Phone

☐ VIP?

1 CM/Track Login  CM/Track Password

2 *Track user*

Create

Figure 97: Data fields for CM/Track



The *Track user* field might be visible, although CM/Track is not active in your system or not configured for the current customer group. In this case, you can simply ignore the field.

## D.4.2 Managing contacts

This chapter discusses the following tasks related to contacts:

- [Accessing existing contacts](#)
- [Editing contact data](#)
- [Associating a person with another company](#)
- [Adding attachments](#)
- [Adding comments](#)
- [Printing a contact page](#)
- [Performing contact activities](#)
- [Creating a case for the contact](#)
- [Transferring data to another contact](#)
- [Deactivating a contact](#)
- [Deleting a contact with Delete \(keep related data\) / Delete](#)
- [Anonymizing a person](#)
- [Deleting a person with Delete \(with all related data\)](#)
- [Making contacts available again](#)



Changes to contact data are always **global** changes, i.e., it does not matter where you carry out a change, it will always affect all places where this contact is used (contact page and cases). This is because ConSol CM keeps the contact data in a central contact database.

### D.4.2.1 Accessing existing contacts

If you want to see all details about a contact, you have to open its contact page. There are several ways to access the contact page of an existing contact:

- Opening a contact page from the [contacts section](#) of a case.
- Opening a contact page using the link in the [case list](#).
- Searching for a contact using the [Quick Search](#) or the [Detailed Search](#).
- Opening a person page using the link in the [persons section](#) of a company page.
- Opening a company page using the *Jump to company* link in the context menu of a company in the header section of a person page.
- Opening a contact page via a relation (e.g., in the section for related contacts of a [resource page](#), or in the [section for related contacts](#) of another contact page).

### D.4.2.2 Updating contacts

#### Editing contact data

You can edit contact data using the *Edit* button in the [header section](#) or the *Edit* button in the [details section](#) provided that you have the required permissions.

Figure 98: Editing contact data

- (1) Click the *Edit* button in the header section of the contact.
- (2) Click the *Edit* button in the upper right corner of the details section.

The section's background turns yellow to indicate that it is in edit mode. Edit the contact data as required (see [Data fields](#) for details about the different types of data fields). Click *Save changes* to save the new data. The section background turns gray again (view mode).

You can also edit contact data within a case where the contact is added as the main contact or as additional contact (see [Editing contact data](#)).

#### Associating a person with another company

If a person is linked to the wrong company, you can fix this on the person page. There you can change the company which a person belongs to.

To do so, please proceed as follows:

1. Open the person page and click the *Change* link in the context menu of the associated **company**.
2. Provide the desired company:
  - a. Start typing the company name and select one of the suggestions from the [Auto-complete Search](#).
  - b. Click the *Create* link to create a new company (see [Creating a contact](#)).

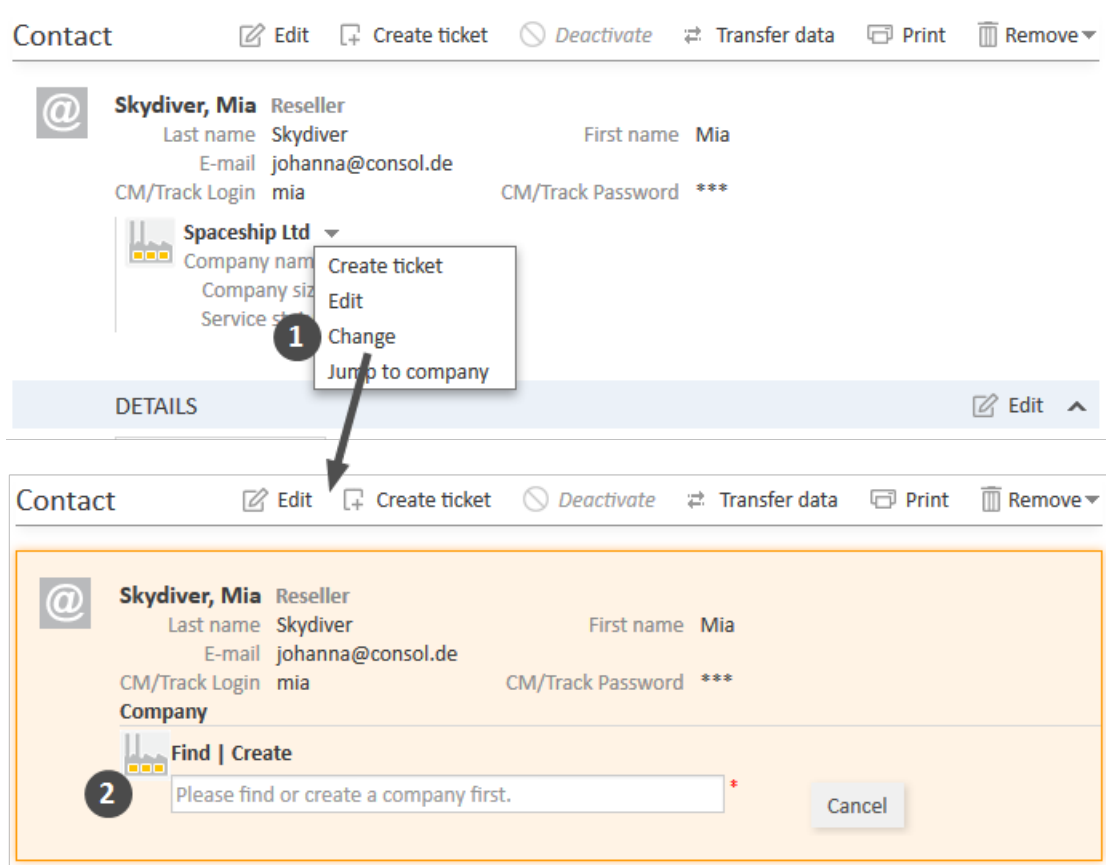


Figure 99: Changing the company of a person

### Editing comments and attachments

The [comments and attachments section](#) of the contact page allows you to add comments and attachments to the contact. The respective permissions are granted independently from the permissions to read and write contact data, so it is possible that you cannot view or edit this section.

You can use the comments and attachments section to collect information about the contact which is not related to a specific case, e.g., adding the contact's service contract as an attachment, or writing a comment about the best way to contact the person.

### Adding attachments

To add an attachment, click the *Attachment* link in the header of the section. The section background turns yellow to indicate that it is in edit mode. If the section is already in edit mode, you can also add an attachment by clicking the *Attachment* tab.

NO COMMENTS AND ATTACHMENTS

Comments Attachments

New

1 Drop files or click to select files

2

File Order.docx Delete

Description

File CM6-Release-Notes-6.10.5.pdf Delete

Description

3

List of attachments

This contact does not have any attachments.

Figure 100: Adding an attachment

Please proceed as follows to add an attachment:

1. Specify the files to be uploaded by either:
  - Dragging and dropping them into the white area.
  - Clicking into the white area to open a file browser dialogue and selecting the files.
2. The selected files are displayed in a list below the white area. Optionally, you can add a description in the *Description* field. Click the *Delete* link to remove a file from the list.
3. Click the *Add* button to upload the files to the contact page.

The attachments are then displayed in the list of attachments below (still empty in the above figure).

The list of attachments provides the following information. You can filter the list using the drop-down boxes and text fields in the header:

- **File type**  
Indicates the file type of the attachment.
- **Name**  
Indicates the file name of the attachment. Click the file name to download and open the attachment.
- **Description**  
Indicates the description provided when the attachment was added, if any.
- **Date**  
Indicates the date when the attachment was added.



- **Added by**  
Indicates who added the attachment. This can be either a user (who uploaded the file) or a technical user (in case the file was automatically uploaded by the system).
- **Action**  
Provides links to the available actions. These are:
  - **Apply filters**  
Filters the list according to your selections in the header.
  - **Clear filters**  
Removes the filter, i.e., displays all entries.

You can delete an attachment by clicking the cross on the right. Click *OK* in the red field to confirm the removal of the attachment. You cannot undo the removal once you confirmed it.



The possible file formats, maximum file size, and whether attachments are searchable depend on the individual configuration of your CM system.

### Adding comments

To add a comment, click the *Comment* link in the header of the section. The section background turns yellow to indicate that it is in edit mode. If the section is already in edit mode, you can also add a comment by clicking the *Comment* tab. Enter the comment and click *Add*. The comment is then displayed in the list of comment below.

The list of comments provides the following information. You can filter the list using the drop-down boxes and text fields in the header:

- **Date**  
Indicates the date when the comment was added.
- **Added by**  
Indicates who added the comment. This can be either a user (who entered the comment) or a technical user (in case the comment was automatically created by the system).
- **Comment**  
Shows the comment.
- **Action**  
Provides links to the available actions. These are:
  - **Apply filters**  
Filters the list according to your selections in the header.
  - **Clear filters**  
Removes the filter, i.e., displays all entries.

You can delete a comment by clicking the cross on the right. Click *OK* in the red field to confirm the removal of the comment. You cannot undo the removal once you confirmed it.

### Printing a contact page

You can print a contact page by clicking the *Print* link in the upper right corner of the contact page. A pop-up window is displayed where you can select the desired printer.

### D.4.2.3 Performing contact activities

Contact activities allow you to perform certain actions for the current contact. You can find them in the *Activities* box next to the open contact page. Depending on the availability for a company or a person, the activity is called *company activity* (company action) or *person activity* (person action). Click the desired activity to perform the corresponding action.

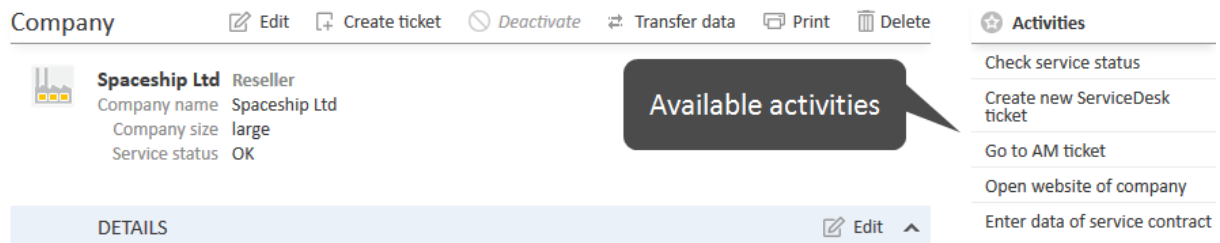


Figure 101: *Company activities*

Examples for contact activities are:

- Create a new case for the person.
- Open the company's website.
- Load contact data from an external source.

Contact activities can have a form which needs to be filled out before proceeding. See [Forms for activities](#) for further information.

**i** The available contact activities depend on the type of contact (company or person), his customer group, and the individual configuration of your CM system. You can only perform contact activities if you have the required permissions to perform activities for this customer group.

### D.4.2.4 Managing the contact's cases

#### Creating a case for the contact

The contact page provides a convenient way to create a new case for this contact. Please proceed as follows:

1. Open the contact page.
2. Click the *Create case* button in the header section.
3. Fill out the required data on the *Create case* page and click *Create*.
  - a. The current contact is already selected as the main contact of the new case.
  - b. You can only select processes to which the customer group of the current contact is assigned.

Please see [Creating a case](#) for further information about case creation.

**i** The *Create case* option is not available for companies in two-level contact models where cases can only be created for persons.


### Transferring data to another contact

You can transfer the data of one contact to another contact. This is necessary for example if you want to deactivate or delete the contact. It depends on the type of contact which data is transferred:

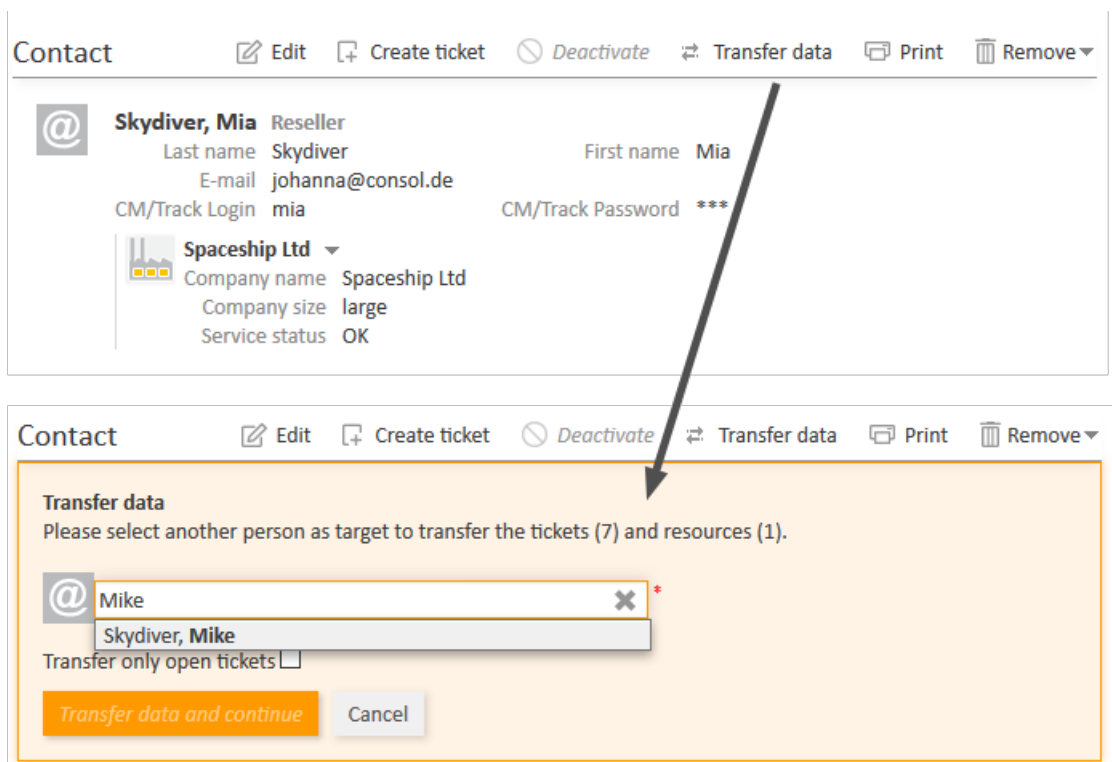
- **Persons:** Only cases (if you reach this screen after clicking the *Delete* button, resources are transferred as well)
- **Companies:** Cases, persons, and resources

Please proceed as follows:

1. Open the contact page.
2. Click the *Transfer data* button in the header section.
3. Select the contact who should receive the data using the [Autocomplete Search](#).

 The checkbox *Transfer only open cases* determines if you transfer only open cases (checkbox selected) or both open and closed cases (checkbox not selected). Select the checkbox if you want to **deactivate** the contact afterwards. Leave it unchecked if you want to **delete** the contact, as you have to move **all** cases in this case.

4. Click *Transfer data and continue*. The new contact will replace the previous contact in the cases of the selected state (open / open and closed). This applies both to cases where the contact is the main contact and to cases where the contact is an additional contact. In case of a company, the new company also receives the persons and the resources of the previous company. In case of a person which should be deleted, resources are transferred as well as cases.



**Contact** Edit Create ticket Deactivate Transfer data Print Remove

**Skydiver, Mia** Reseller  
 Last name Skydiver First name Mia  
 E-mail johanna@consol.de  
 CM/Track Login mia CM/Track Password \*\*\*

**Spaceship Ltd**  
 Company name Spaceship Ltd  
 Company size large  
 Service status OK

**Transfer data**  
 Please select another person as target to transfer the tickets (7) and resources (1).

@ Mike x  
 Skydiver, Mike

Transfer only open tickets ☐

Transfer data and continue Cancel

Figure 102: Transferring cases to another contact



If you use the *Transfer data* option, only data for which the current user has access permissions is transferred. If you transfer data because you are deleting the contact, all contact data is transferred.

#### D.4.2.5 Making contacts unavailable

There are several ways to make contacts unavailable and/or remove contact data. The appropriate option depends on your use case.

Option	Use case
<b>Deactivate</b>	The contact is inactive. He has no open cases and should not be used for new cases. Nevertheless, you want to keep his data and you might want to reactivate him later.
<b>Delete (keep related data)</b>	You do not need the contact anymore. He has no cases and is not going to be used anymore.
<b>Anonymize</b>	The person has requested that all his data should be removed according to GDPR (General Data Protection Regulation). You still need the person for reports though.
<b>Delete (with all related data)</b>	The person has requested that all his data should be removed according to GDPR (General Data Protection Regulation). He is not needed for reports anymore.



These actions cannot be undone except for deactivating the contact.

#### Deactivating a contact

The following table provides a summary of the preconditions and implications of deactivating a contact:

	Deactivating a contact
<b>Type of contact</b>	Company or person
<b>Preconditions</b>	<ul style="list-style-type: none"> <li>The contact must not be the main contact of any open case.</li> <li>Company in a two-level model: The persons of the company must not be the main contact of any open case.</li> </ul>
<b>Reversal</b>	Can be undone by reactivating the contact.

	Deactivating a contact
<b>Implications</b>	<p>The following actions are not possible anymore:</p> <ul style="list-style-type: none"> <li>• Creating cases for the contact</li> <li>• Assigning cases to the contact</li> <li>• Assigning a deactivated person to another company</li> <li>• Assigning persons to a deactivated company</li> <li>• Searching for the contact using the Quick Search, Autocomplete Search, and Detailed Search without the option <i>Deactivated incl.</i></li> </ul> <p>The following actions are still possible:</p> <ul style="list-style-type: none"> <li>• Finding the contact using the option <i>Deactivated incl.</i> in the Detailed Search</li> <li>• Finding the closed cases of the contact in the Quick Search, Detailed Search, and Autocomplete Search by entering the contact name</li> <li>• Editing contact data</li> <li>• Reactivating the contact</li> <li>• Transferring the closed cases of the contact</li> <li>• Performing activities for the contact</li> <li>• Deleting the contact</li> </ul>

You can deactivate a contact on his contact page. The preconditions for deactivating the contact (see table) have to be met and you need the corresponding permission.

Please proceed as follows:

1. Open the contact page of the contact.
2. Click the *Deactivate* button in the header section.
3. The contact is deactivated. If you deactivate a company, all the persons of the company are also deactivated.

#### Deleting a contact with *Delete (keep related data)* / *Delete*

The following table provides a summary of the preconditions and implications of deleting a contact. For persons, this option is called *Delete (keep related data)* and for companies it is called *Delete*.

	Deleting a contact (keep related data)
<b>Type of contact</b>	Company or person
<b>Preconditions</b>	The contact must not be the main contact or an additional contact of any case (both open and closed).
<b>Reversal</b>	Cannot be undone.

	Deleting a contact (keep related data)
<b>Implications</b>	<ul style="list-style-type: none"> <li>• No actions are possible.</li> <li>• Neither the contact himself nor his cases can be found by entering the contact name.</li> <li>• Some references to the contact can remain in the history of other objects, e.g., the cases which were transferred to another contact, related contacts or resources.</li> </ul>

You can delete a contact on his contact page, provided that you have the required permissions.

Please proceed as follows:

1. Open the contact page, i.e., the company or the person page.
2. For persons: Click the *Remove* button in the header section and select *Delete (keep related data)*.  
For companies: Click the *Delete* button in the header section.
3. If the contact still has (open or closed) cases or related resources, you need to transfer this data to another contact (see [Transferring data to another contact](#)). In case of a company, the persons belonging to the company have to be transferred as well.
4. The contact is removed from the system. A reference regarding the data transfer remains in the case history (see following figure).

The screenshot shows a case history entry with the following details:

- Timestamp:** 4/26/16 10:32
- Header:** #1 created by Susan ServiceDesk | Action ▼
- Class:** default class
- Subject:** Keyboard does not work
- History Items:**
  - Main customer changed from Skywalker,Mara to **Skywalker,Luke**
  - Time booking added: 4/26/16 10:30 AM Duration: 00:01
  - Mark without SLA has been triggered
  - Reaction time set to 4/26/16
  - Main customer set to Skywalker,Mara
  - Ticket created
  - Priority set to low
  - Queue set to HelpDesk 1st Level

A speech bubble points to the history item "Main customer changed from Skywalker,Mara to **Skywalker,Luke**" with the text: "Reference to case transfer from Mara Skywalker (now deleted) to Luke Skywalker".


Figure 103: History entry after data transfer

**i** We recommend not to delete contacts because this has a huge impact on the data history. You won't be able to find the cases which belonged to this contact anymore. The case history entries relating to the contact will remain in the case though.

Deactivate the contacts instead!

### Anonymizing a person

The following table provides a summary of the preconditions and implications of anonymizing a person:

	Anonymizing a person
<b>Type of contact</b>	Person
<b>Preconditions</b>	None
<b>Reversal</b>	Cannot be undone.
<b>Implications</b>	<ul style="list-style-type: none"> <li>• The fields containing personal data of the person are removed. The history, comments and attachments of the person are removed. Afterwards, an entry that the person has been anonymized is added to the person history.</li> <li>• The fields containing personal data in the cases where the person is the main contact are removed. The history of these cases is removed, and afterwards an entry that the person has been anonymized is added to the case history.</li> <li>• Relations to other objects are removed, and the person is anonymized in the respective history entries of these objects.</li> <li>• The person and her cases can still be used in reports.</li> </ul> <div>  It depends on the individual configuration of the CM system, which person and case fields are marked to contain personal data.         </div>

You can anonymize a person on his person page if you have the corresponding permission.

Please proceed as follows:

1. Open the person page of the person.
2. Click the *Remove* button in the header section and select *Anonymize*.
3. The person is anonymized (see implications in the table above).

### Deleting a person with *Delete (with all related data)*

The following table provides a summary of the preconditions and implications of deleting a person using the option *Delete (with all related data)*:

	Deleting a person (with all related data)
<b>Type of contact</b>	Person
<b>Preconditions</b>	None
<b>Reversal</b>	Cannot be undone.

	Deleting a person (with all related data)
<b>Implications</b>	<ul style="list-style-type: none"> <li>• The person is completely removed from the CM system.</li> <li>• The cases of the person are removed from the CM system.</li> <li>• The relations of the person to other objects are removed, and the person is anonymized in the respective history entries of these objects.</li> <li>• The person and her cases cannot be used in reports anymore.</li> </ul>

You can delete a person with his related data on the person page if you have the corresponding permission.

Please proceed as follows:

1. Open the person page of the person.
2. Click the *Remove* button in the header section and select *Delete (with all related data)*.
3. The person is deleted (see implications in the table above).

#### D.4.2.6 Making contacts available again

You can make a deactivated contact, which is displayed in italics, available again by reactivating him. To do so, please proceed as follows:

1. Open the contact page of the contact.
2. Click the *Reactivate* button in the header section.
3. The contact is reactivated but he does not get his cases back (in case his cases were transferred to another contact before deactivating him). If the contact is a company, its persons remain deactivated. You have to reactivate them one by one.



## D.4.3 Relations to contacts and resources

You can create relations between contact ([contact relations](#)) and between contacts and resources ([resource relations](#)).

Contact relations allow you to take advantage of the CRM functionalities of ConSol CM and structure your contact base. For example, you can link a reseller to his end contacts.

Resource relations allow you to link your contacts to the resources which they use. For example, you can link a contact to the printer he owns.

### D.4.3.1 Contact-contact relations

This chapter discusses the following:

- [Introduction](#)
- [Display of contact relations](#)
- [Configuring the columns](#)
- [Adding a contact relation](#)
- [Editing the note of a contact relation](#)
- [Switching to the related contact](#)
- [Deleting a contact relation](#)

#### Introduction

ConSol CM provides comprehensive CRM (Contact Relationship Management) functionalities which allow you to create links between your contacts. These links are called relations and they can be established between contacts of the same customer group and between contacts of different customer groups. This way you can structure your contact base in ConSol CM to better reflect your real contacts.

Examples for contact-contact relations (for greater readability called *contact relations* in this section) are:

- You want to map your contact's organizational chart, so you introduce directional relations (*supervisor of* and *supervised by*) between his persons.
- You have two customer groups (resellers and end contacts) and you want to reflect which reseller sells products to which end contacts. To achieve this, you create directional relations (*sells products to* and *buys products from*) between contacts from the customer group *Reseller* and contacts from the customer group *End contacts*.

The relations provide additional information about the contact and enable you to quickly access the pages of the related contacts. You can create relations based on the relation models which are configured in your CM system. The following is defined for each relation model:

- The relation **type** determines whether the relation is hierarchical (**directional relation**) or on the same level (**reference relation**).
- The **customer group** which the contact has to belong to.
- The **level** determines the type of contact used in the relation. This can be:
  - **Company**
  - **Person**
  - **Any** (either a person or a company)

- Whether the relation is editable, i.e., whether it can be added, edited, and deleted in the Web Client.

### Display of contact relations

The contact relations are displayed in the [section for related contacts](#) of the contact page. There is a table for each relation model. The heading states the name of the relation model, the target customer group, and the type of contact, which can be either company, or person, or any (1). If no name has been configured for the relation, *Related* is displayed instead of the relation name.

The table contains the relations which were created for this relation model. You can configure the displayed column using the tool icon (2). The table usually contains a link to open the contact page (3), a link to edit the note of the relation (4) and an icon to delete the relation (5).

You can add a relation by clicking the *Add* link (6).

The screenshot shows a table titled "Buyer (Reseller) (Contact)". Above the table is a header bar with "RELATIONS (1) as List or Graph" and a "+ Add" button with an upward arrow. The table has five columns: "Contact", "Date", "Note", and "Actions". The first row contains an email icon, "Skydiver, Mia", the date "2/28/17 15:42", the word "Edit", and a delete icon (X). Numbered callouts point to: 1. The table title, 2. The settings gear icon, 3. The contact name link, 4. The edit note link, 5. The delete icon, and 6. The "+ Add" button.

Contact	Date	Note	Actions
@ Skydiver, Mia	2/28/17 15:42	Edit	X

Figure 104: Display of available contact relations

**i** You can also show a [relation graph](#) in this section.

If the type of contact is *any*, i.e., either a company or a person, there are two tabs: one for relations to persons and one for relations to companies.

### Sells products to (Reseller) (Any)

The screenshot shows two tabs: "Contact" (active) and "Company". Below the tabs is a table with the same structure as Figure 104. The first row contains an email icon, "Skydiver, Mike", the date "3/1/17 10:23", the word "Edit", and a delete icon (X).

Contact	Date	Note	Actions
@ Skydiver, Mike	3/1/17 10:23	Edit	X

Figure 105: Tabs for contact relations

The relations are displayed on the contact pages of both affected contacts. Depending on the relation type, the name may be different on each side:

- **Reference relations**

The tables on both contact pages have the same name.

**Example:** A reference relation between two contacts could be *Partner*. Both contacts are on the same level and the relations table has the same heading on both contact pages (see example above).

- **Directional relations**

The tables have different names on each contact page.

**Example:** A directional relation between two persons could be *Buyer* and *SalesRep*. One contact represents the purchaser of goods and the other contact is the sales representative. The headings of the relations tables reflect this, so you can see the role of each contact (see example below).

### Configuring the columns

You can resize the table columns by dragging each column to the desired width.

Open the context menu next to the wheel icon to configure the table columns. The default columns (Person/Company, Date, Note, Actions) cannot be removed, but you can add additional columns by entering the column name and selecting one of the suggestions from the [Autocomplete Search](#). You can remove additional columns by clicking the cross next to their name.

### Adding a contact relation

Please proceed as follows to add a new contact relation.

The figure illustrates the process of adding a contact relation in three steps:

- Step 1:** The interface shows a header "NO RELATIONS" and a "+ Add" button.
- Step 2:** The "Add relation" dialog is open for "Mr Luke Skywalker". A dropdown menu is shown with options: "Choose One", "Supervisor", "Subordinate", and "Buyer".
- Step 3:** The "Buyer" option is selected. The second field contains "Mia" and the "Note" field contains "Skydiver, Mia".
- Step 4:** The "Add relation" button is highlighted, ready to be clicked.

Figure 106: Adding a contact relation

1. Click *Add* in the header of the section for related contacts of the desired contact page (in this example, *Luke Skywalker*).
2. Select the type of relation from the drop-down list.
3. Select the target contact using the [Autocomplete Search](#) in the field *Unassigned*. Optionally, you can enter a note in the field below.
4. Click *Add relation* to create the relation to the selected contact. The relation is automatically created for both affected contacts, i.e., the current contact and the selected target contact.






The following figures show the resulting relation:

- On the contact page of *Luke Skywalker*, you can see the relation of type *Buyer* to the person *Mia Skydiver* from the customer group *Reseller* (1).
- On the contact page of *Mia Skydiver*, you can see the relation of type *Sales Representative* to the person *Luke Skywalker* from the customer group *End contacts* (2).

1

RELATIONS (1) as [List](#) or [Graph](#) + Add ^

Buyer (Reseller) (Contact)

	Contact	Date 	Note 	Actions
	 <a href="#">Skydiver, Mia</a>	2/28/17 15:42	Edit	

2

RELATIONS (1) as [List](#) or [Graph](#) + Add ^

Sales Representative (End customers) (Contact)









	Contact	Date 	Note 	First name 	Last name 	Actions
	 <a href="#">Mr Luke Skywalker</a>	2/28/17 15:42	Edit	Luke	Skywalker	

Figure 107: Contact relation added

 The action of adding or deleting a relation can trigger additional changes, e.g., the value of a data field can be updated. This depends on the individual configuration of your CM system.

#### Editing the note of a contact relation


Click *Edit* in the *Note* column of the relation to add or edit its note. The note is optional.

#### Switching to the related contact

You can switch to the contact page of the related contact by clicking his name in the column named *Person* or *Company*. If you click another column, a preview window is opened where you can choose to open the contact page.

#### Deleting a contact relation

Click the cross in the *Actions* column to delete the relation. Then, click *OK* in the red field to confirm the removal. Note that the relation is also removed from the page of the related contact. You cannot undo the removal once you confirmed it.

 The action of adding or deleting a relation can trigger additional changes, e.g., the value of a data field can be updated. This depends on the individual configuration of your CM system.

### D.4.3.2 Contact-resource relations

This chapter discusses the following:

- [Introduction](#)
- [Display of resource relations](#)
- [Adding a resource relation](#)
- [Editing the note of a resource relation](#)
- [Switching to the related resource](#)
- [Deleting a resource relation](#)

#### Introduction

Contact-resource relations (for greater readability called *resource relations* in this section) can be used to link resources to the contacts. This allows you to quickly access the relevant assets of the contacts from their contact pages. In a Service Desk process, these assets can be for example the computer and printer used by the contact. You can also use resource relations to support the CRM functionalities of ConSol CM: For example you create an asset for a trade fair you attended and link this trade fair to all the contacts you met there.

#### Display of resource relations

Resource relations are displayed in the [section for related resources](#) of the contact page. If no resource relations are set for the contact, the section is collapsed. You can expand it to add a relation by clicking the arrow icon in the section header. If there is at least one relation, the *Show* filter is displayed, where you can choose to see all possible relations (*All relations*) or only the relations which are set for the contact (*Only assigned relations*).

The layout depends on the selected visibility setting. The following figure shows the section for related resources with the visibility setting *Extended*. Each resource category is displayed in a box which contains the relations configured for this resource category. The resources are arranged below the name of the relation. If no name has been configured for the relation, *Related* is displayed instead.

Click the relation name to display the related resources. You can display further details about the resource by clicking the resource name. Click the small arrow button next to the resource name to open the context menu of the resource which allows you to delete the relation and jump to the resource page.

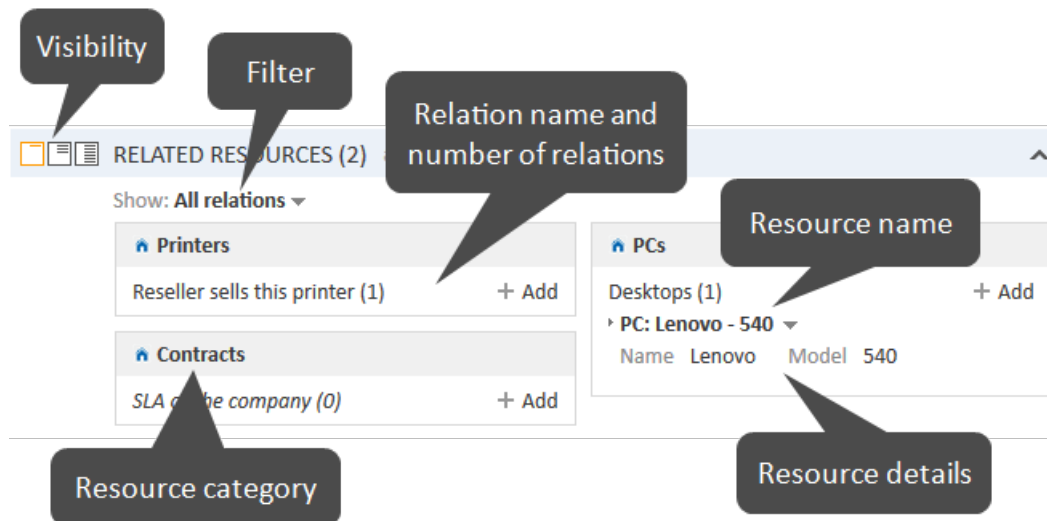


Figure 108: Resource relations

**i** You can also show a [relation graph](#) in this section.

You can create relations based on the relation models which are configured in your CM system. The following is defined for each relation model:

- The **resource type**, i.e., which kind of resources can be linked to the contact.
- The **customer group** and **type** (company, person, or both) which can be used for the relation.
- The **cardinality** of the relation, i.e., if you can link several resources of the same resource type to the contact, and if the same resource can be linked to several contacts.
- The availability of the *Note* field.
- Whether the relation is editable, i.e., whether it can be added, edited and deleted in the Web Client.

**i** Resource relations are only available if your CM system uses CM/Resource Pool. The available relations and their configuration depends on the individual configuration of your CM system.

### Adding a resource relation

Please proceed as follows to add a new resource relation.

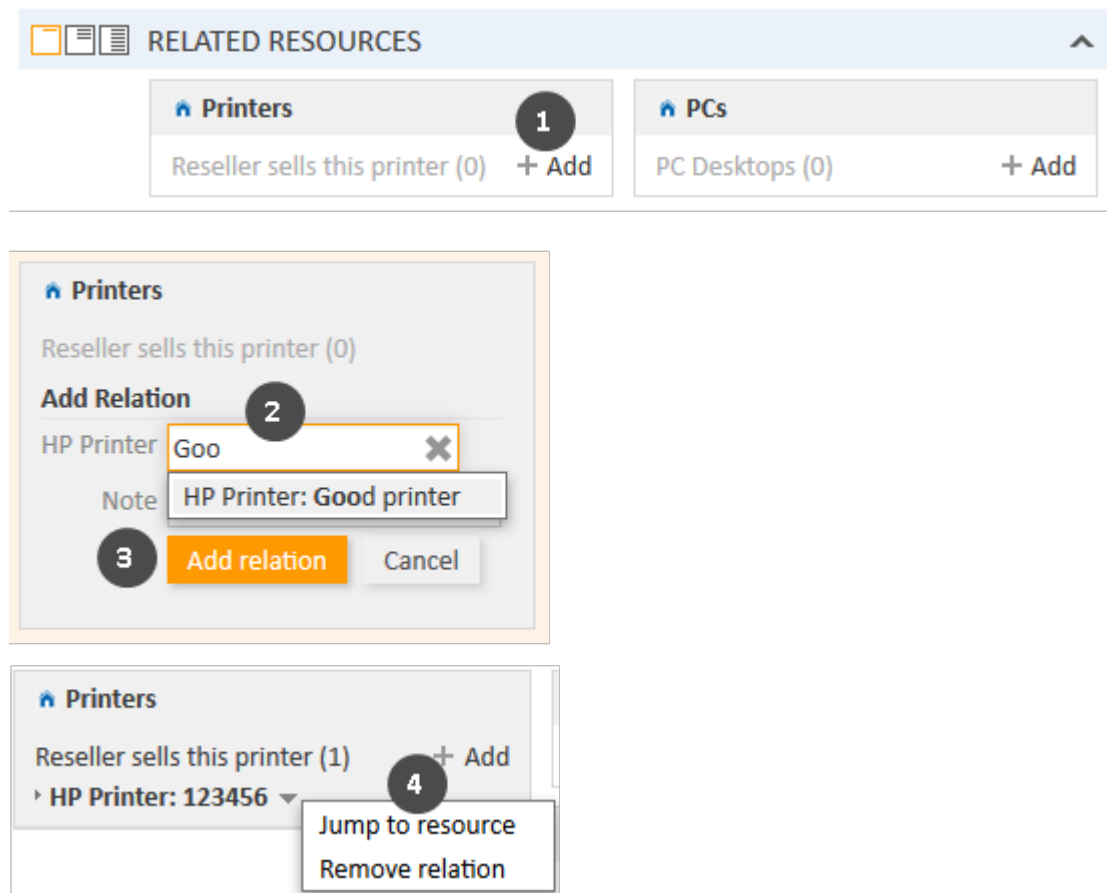


Figure 109: Adding a resource relation

1. Click the *Add* link next to the required relation name.
2. Start typing the name of the resource and select the desired resources from the suggestions of the [Autocomplete Search](#). Optionally, you can enter a note.
3. Click *Add relation*.
4. The resource is now linked to the contact. You can click the link with the resource name to display further details about the resource. The amount of detail varies depending on the selected visibility level.

**i** The action of adding or deleting a relation can trigger additional changes, e.g., the value of a data field can be updated. This depends on the individual configuration of your CM system.

### Editing the note of a resource relation

Click *Edit* next to *Note* to edit the relation's note. The *Edit* link is only displayed if you have the selected the visibility level *Detail* (see [Visibility level](#)).

### Switching to the related resource

You can view the corresponding resource by clicking *Jump to resource* in the context menu.

### Deleting a resource relation

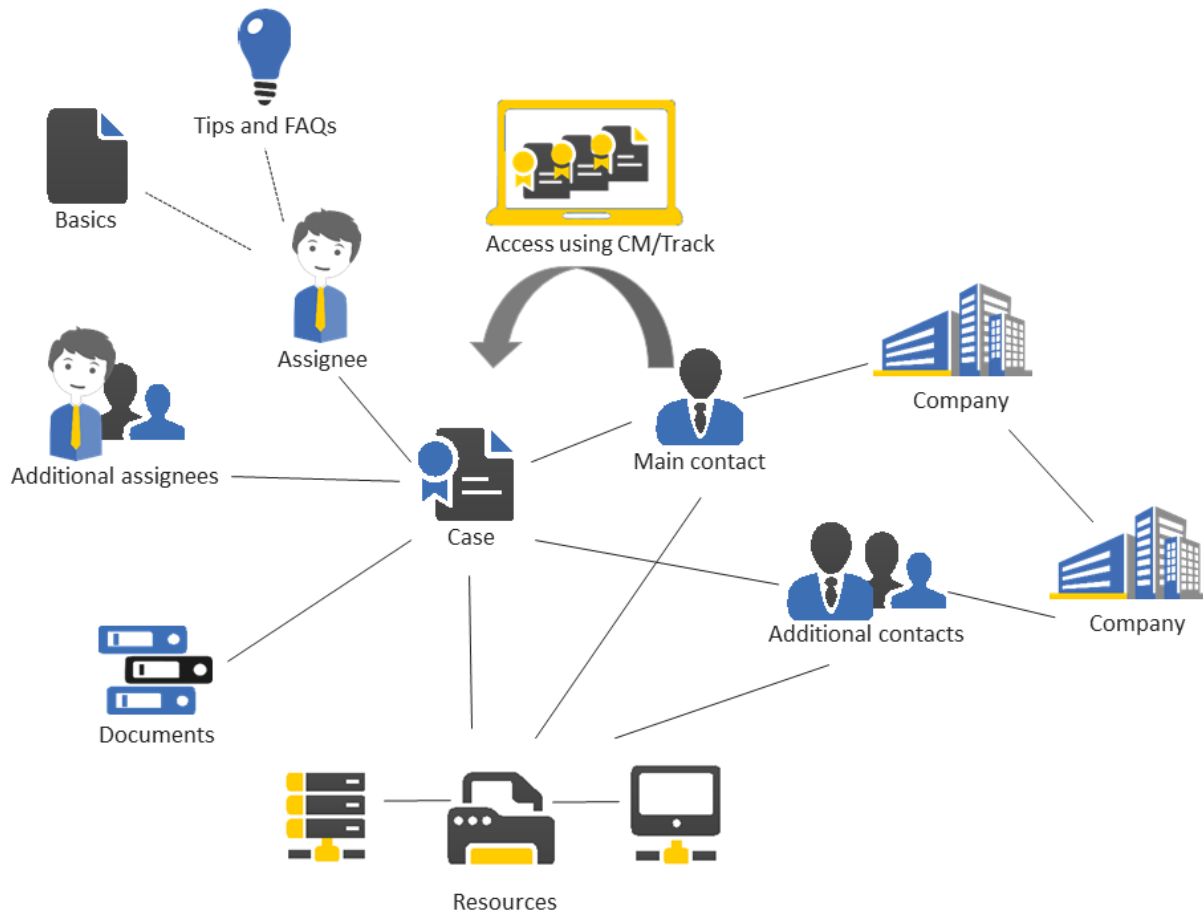
Click *Remove relation* in the context menu to delete the relation. Then, click *Yes* to confirm the removal of the relation. Note that the relation is also removed from the page of the related resource. You cannot undo the removal once you confirmed it.



The action of adding or deleting a relation can trigger additional changes, e.g., the value of a data field can be updated. This depends on the individual configuration of your CM system.



## E - Optional ConSol CM add-ons



ConSol CM offers several optional add-ons for improved business process management. Whether those add-ons are available depends on the configuration of your CM system.

This section provides you with all information about working with those add-ons.

### CM/Resource Pool

CM/Resource Pool is an optional module which extends the CM database to manage additional data object called *resources*. Resources can be used to store assets which are relevant for the business process.

- [CM/Resource Pool](#)

### CM/Doc

CM/Doc enables you to import case and customer data automatically into Microsoft Word and OpenOffice templates. This functionality allows you to quickly create a new document and directly attach it to the case.

- [CM/Doc](#)

### CM/Track

CM/Track is an online portal that provides external access to cases in your CM system for your (internal and external) customers. Your customers can track the status of their cases and create new cases using CM/Track.

You do not work directly in CM/Track, but you should take CM/Track into account when working with cases in the Web Client because some of your actions have an impact on what your customers see in CM/Track. Also, you might need to grant your customers access to CM/Track, which is done in the Web Client.

The current version of CM/Track is CM/Track V2.

- [CM/Track](#)

#### CM/Archive

CM/Archive is an independent application which allows archiving cases. You can use CM/Archive to view archived cases which have been removed from the Web Client.

- [CM/Archive](#)

#### CM/Phone

CM/Phone integrates the telephone system of your company with the ConSol CM system (CTI, Computer Telephony Integration). This enables you to call customers with just one click in the Web Client or to create a new case for the customer of an incoming call.

- CM/Phone will be treated in a later version of this manual.

## E.1 CM/Resource Pool

Starting with version 6.10, ConSol CM offers the add-on **CM/Resource Pool**. CM/Resource Pool is an optional module which extends the CM database to manage additional data object called *resources*. Resources can be used to store assets which are relevant for the business process. In a help desk process, this can be for example the computers and printers, for which the contacts create cases. A reseller can use the resource pool to reflect their product portfolio. The sales department might create resources for trade fairs they attend and link them to the contacts they met there.

This section provides you with all the information you need to work with resources.

Explanation of the concept and structure of the resource page:

- [Basic knowledge about resources](#)
- [Display of resources](#)
- [Display settings](#)

All you need to know for working with resources:

- [Working with resources](#)


## E.1.1 Basic knowledge about resources

### E.1.1.1 Terms and definitions

Resources are objects managed in CM/Resource Pool. CM/Resource Pool is an optional add-on, so it may not be present in your system. If your system does not use CM/Resource Pool, you can skip this section.

The kind of resources available in your Web Client depends on the individual implementation of CM/Resource Pool in your company. Examples for resource pool implementations are:

- A help desk manages IT assets, e.g., computers, printers, monitors, and other technical devices as resources. This allows them to link the assets to the contacts who use them, and to the cases concerning the asset.
- A manufacturing company manages their products, e.g., coffee machines, as resources. This allows them to gather all information about the products in one place.

 The objects in CM/Resource Pool are called *resources* in this manual. They can have a different name in your CM system, e.g., *products* or *assets*. The term used depends on the individual configuration of your CM system.

## E.1.2 Display of resources

Resources are displayed on several pages. The [resource dashboard](#) provides an overview of all resources, the [resource type page](#) shows all resources of a given type, e.g., all printers of type *HP 4711*, and the [resource page](#) contains the details of a specific resource, e.g., of one specific printer of the type *HP 4711*.

### E.1.2.1 Resource dashboard

The resource dashboard is displayed when you click the menu item *Resource pool* (1). In the upper part of the screen, it shows a graphical summary of the resources which are present in the system (2). The lower part of the screens contains links to access existing resources (3) and create new ones (4). The resource types (6) are listed below their resource category (5).




Figure 110: The resource dashboard

### E.1.2.2 Resource type page

The resource type page is opened when you click a resource type on the resource dashboard. It contains a table listing all the resources of the resource type (1). The following actions are possible on this page:

- **Create a new resource (2)**  
Click the *Create* button in the upper right corner of the screen to create a new resource of this resource type.
- **Filter the list (3)**  
Enter search criteria in the *Search results* section to filter the list, see [Detailed Search](#).
- **Configure the table columns (4)**  
Open the context menu next to the wheel icon to configure the table columns. The default column *Resource* cannot be removed but you can add additional columns by entering the column name and selecting one of the suggestions from the [Autocomplete Search](#). You can remove additional columns by clicking the cross next to their name.
- **Open a resource page (5)**  
Click the desired resource to open its resource page.

 You can display deactivated resources by checking the option *Deactivated incl.*

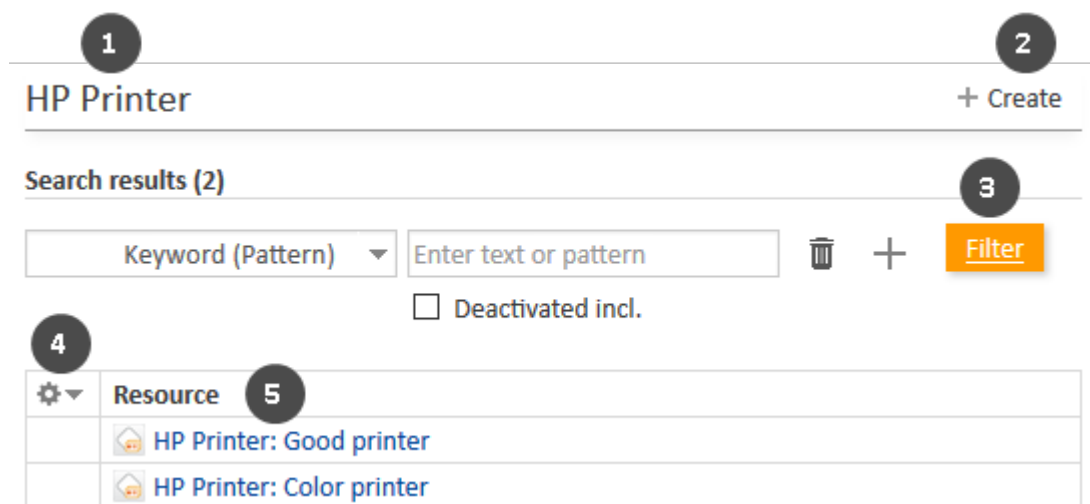


Figure 111: Resource type page

### E.1.2.3 Resource page

The resource page contains resource data and additional information about the resource. It can have up to eight sections. Next to resource page, the available resource activities are displayed.

1
Resource
Edit Deactivate Delete

**PC: Lenovo - 540**  
PCs ▶ Desktops  
Internal | Created: 2/23/17 3:28 PM  
Name: Lenovo    Model: 540

2
DETAILS
Edit ^

Additional information

Operating system: Windows 7

3
NO COMMENTS AND ATTACHMENTS
Comment Attachments ^

Comments Attachments

New  
Click here to add a comment  
List of comments  
No comments added yet

4
CALENDAR
+ Add appointment Refresh v

5
RELATED RESOURCES (1) as List or Graph ^

Show: Only assigned relations v

Printers  
Computer uses this printer (1) + Add

6
RELATED COMPANIES AND PERSONS (1) as List or Graph + Add ^

Related (Reseller)(Any)

Person Company

Company	Date	Company name	Actions
SpaceShip Ltd	2/28/17 2:34 PM	SpaceShip Ltd	

7
RELATED TICKETS (1) as List or Graph + Add ^

Show: All v

Date	Name	Relation	Subject	Actions
2/23/17 3:29 PM	100000	Tickets concerning this PC	Problem with new printer	

8
HISTORY ^

8/31/18 | 14:26 changed by Susan ServiceDesk

Figure 112: Resource page

## Header (1)

The default headline of the section is *Resource*, but it may vary depending on how resources are called in your CM system. It contains the basic resource data. The resource name is displayed in bold font (1). On its left, the resource icon (2) is displayed. Depending on the individual configuration of your CM

system, there can be several icons for different resource types. Below the resource name, you see its resource category and resource type (3), followed by the resource mode and the creation data (4). The resource fields are displayed below (5).

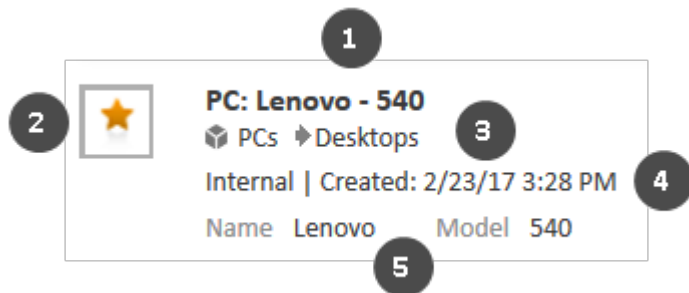


Figure 113: Resource data

In the upper right corner, you find several links which allow you to edit, deactivate, and delete the resource, see [Accessing resources](#).

#### Note on the resource modes

This manual describes how to work with **internal resources**. There are three other resource modes:

- **on-the-fly**  
The resources are not saved in ConSol CM but dynamically retrieved from an external location. You cannot create or edit them in the Web Client. They are only visible in resource relations, where you can add them using their external ID.
- **cached**  
The resources are not saved in ConSol CM initially. Instead, single resources are imported when they are used in resource relations (by providing their external ID). You cannot create or edit these resources in the Web Client, and you can only view the resources which have been imported already.
- **imported**  
The resources are imported from an external system. You can use them in the same way as internal resources but you cannot create new ones. Also, your edits to these resources may get lost when a new resource import takes place.

#### Details (2)

The section headline is usually *Details*. This section contains additional data fields with resource data. Each group has its own tab allowing you to access the data. Click the tab heading to switch to the group. To edit the group data, click the *Edit* link on the right (see [Editing resource data](#)).

#### Comments and attachments (3)

The section headline is *Comments and Attachments*. This section has two tabs showing the comments and attachments added to the resource. The number in the headline refers to the sum of both comments and attachments. You can only see this section if you have the required permissions. Please see [Editing comments and attachments](#) for further information about working with comments and attachments.



#### Calendar (4)

The section headline is usually *Calendar*. This section shows the integrated calendar. It depends on the configuration of your individual CM system if the calendar feature is available. You can add an appointment or refresh the calendar using the links provided on the right. The calendar can be useful when you communicate with a contact: You see your own availability at a glance, so you can quickly schedule a phone call with the contact. Furthermore, you can directly add it as an appointment to your own calendar.

#### Related resources (5)

The default headline of the section is *Related Resources*, but it may vary depending on how resources are called in your CM system. This section shows the resources linked to the resource. You can set the [visibility level](#) to determine how much information you want to see about each related resource. Please see [Resource-resource relations](#) for further information about working with resource relations.

 You can also show a [relation graph](#) in this section.

#### Related contacts (6)

The section heading is usually *Related Companies and Persons* or something similar. It contains the relations existing between this resource and contacts (companies and persons). This kind of relations can be used for example to indicate that a person uses a resource. The relations are arranged below the different relation types (red font). Next to the name of the relation, the customer group and the type of contact (company or person) are displayed. The available relations depend on the individual configuration of your CM system.

Please see [Resource-contact relations](#) for further information about working with related contacts. You can change the table columns and navigate between the pages. Please see [Adjusting tables](#) for further information.

 You can also show a [relation graph](#) in this section.

#### Related cases (7)

The section heading is usually *Related Cases*. It contains the relations existing between this resource and cases. This kind of relations can be used for example to link a case to the resource it concerns. The relations are arranged below the different relation types (red font). You can select whether all cases, only open cases or only closed cases should be displayed by selecting the desired option from the context menu. The available relations depend on the individual configuration of your CM system.

Please see [Resource-case relations](#) for further information about working with relations to cases. You can change the table columns and navigate between the pages. Please see [Adjusting tables](#) for further information. In addition, you can set the [visibility level](#) to determine how much information you want to see about each related case.

 You can also show a [relation graph](#) in this section.

#### History (8)

The section headline is *History*. This section contains the resource history which shows all changes which were carried out for this resource. This includes changes to data fields, and the addition or removal of comments, attachments and relations. The history section contains the date and time of

the change, and the name of the user who carried out the change. The latter can also be a technical name in case of automatic changes.



## E.1.3 Display settings

This chapter discusses the following:

- [Expanding and collapsing sections](#)
- [Visibility level](#)
- [Adjusting tables](#)

### E.1.3.1 Expanding and collapsing sections

The resource page sections, except for the header, can be hidden, collapsed or expanded. If a section is collapsed you only see the section heading but not the content of the section. You can expand the section by clicking the down arrow on the right. To collapse a section and hide its content, click the up arrow. Your CM administrator determines whether resource page sections are displayed collapsed or expanded by default. You can collapse and expand sections while you are working with a resource but the default setting will be restored when you switch to another resource.



Figure 114: *Expanding and collapsing sections*

### E.1.3.2 Visibility level

The visibility level determines the degree of detail of the information displayed in a resource page section. It can be set for the Related Resources section and Related Cases section.

There are three visibility levels:

- **Basic**  
Basic degree of detail
- **Extended**  
Extended degree of detail
- **Detail**  
Maximum degree of detail

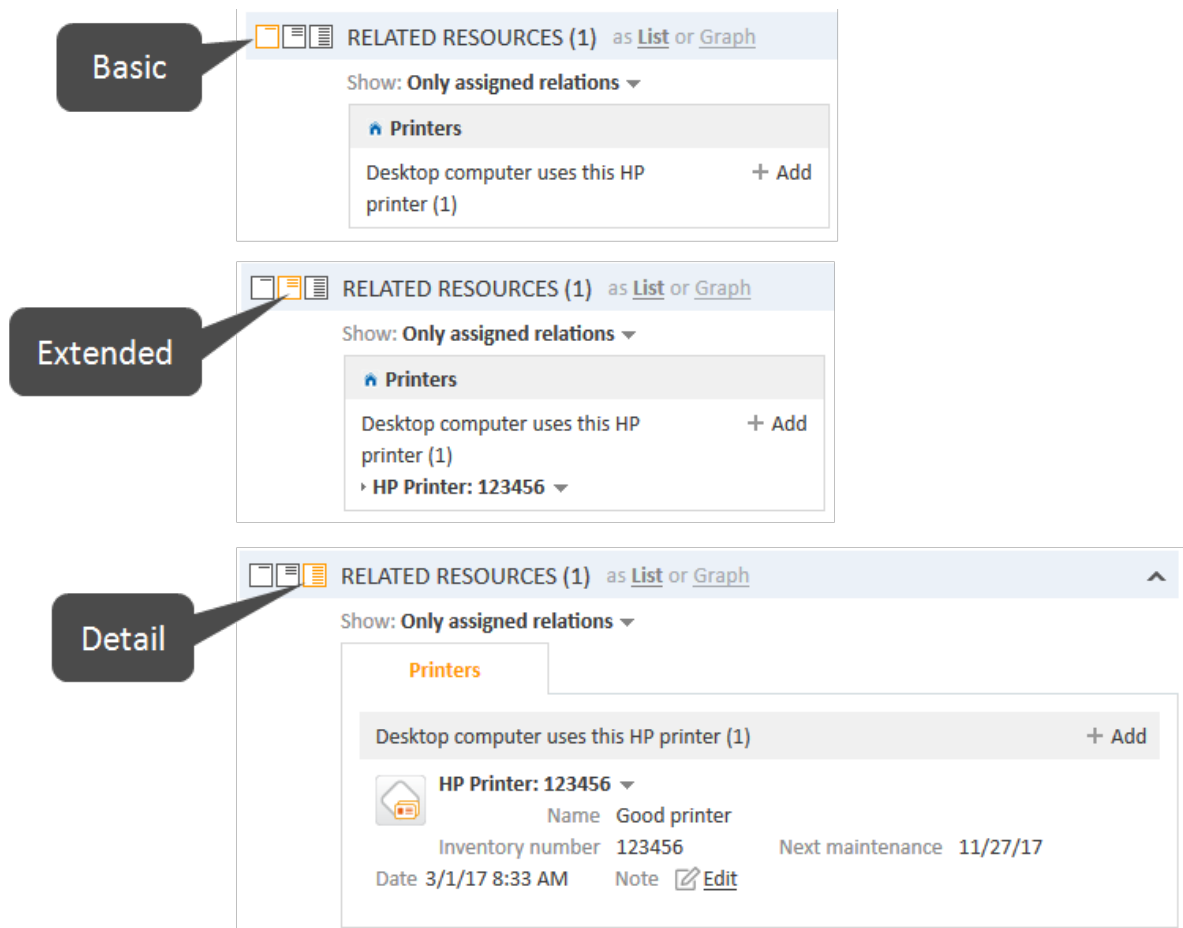


Figure 115: Visibility levels

### E.1.3.3 Adjusting tables

Some resource page sections contain tables. You can resize the table columns by dragging each column to the desired width. You can adjust the table columns by clicking the little arrow next to the wheel icon. To remove a column, click the cross next to the column name. To add new columns, click in the white space next to the names of the displayed columns to see a list of all available columns, or start typing the column name, and click one of the suggested columns. Click *OK* to apply your changes. You can rearrange the columns within the table by dragging-and-dropping the column to the desired position.

If the list exceeds a predefined number of entries, it is split among several pages. You can select the number of entries per page at the bottom of the table and click the arrow buttons and page numbers to navigate the table.

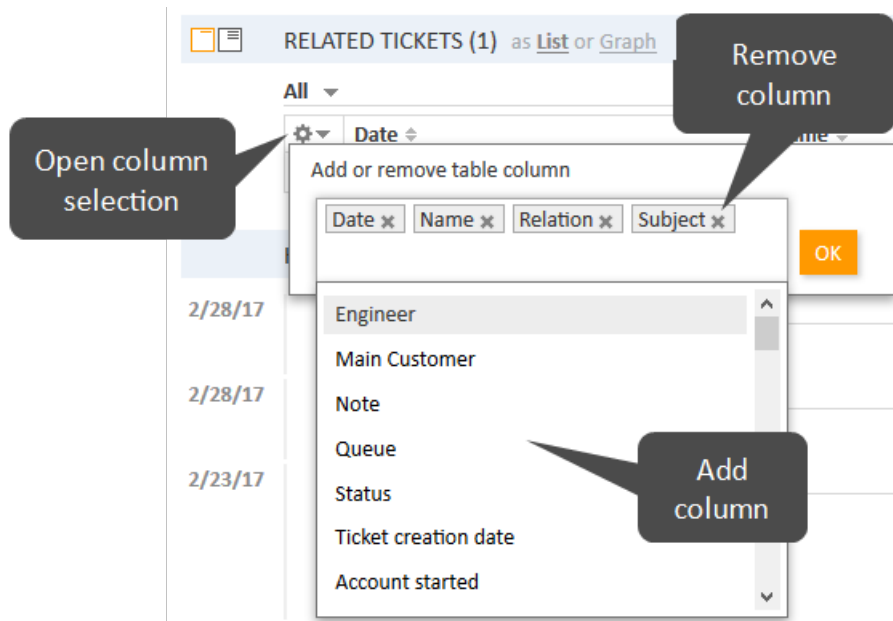


Figure 116: *Adjusting the table columns*

**i** ConSol CM saves your column selection. Even if you leave the resource page or log out of the system, the columns will be displayed as defined when you open the resource page again.

## E.1.4 Working with resources

Some users have roles which allow them to carry out certain activities on resources. Here are some examples of tasks you might perform:

- You create a new resource, see [Creating a resource](#).
- You edit the data of an existing resource, see [Editing resource data](#).
- You deactivate a resource, see [Deactivating resources](#).
- You delete a resource, see [Deleting resources](#).
- You perform an action for the resource, see [Performing resource activities](#).
- You add a comment or attachment to a resource, see [Editing comments and attachments](#).
- You add a relation to a case, contact, or another resource, see [Relations to cases, contacts, and resources](#).

It depends on your permissions whether you are allowed to perform one or several of those tasks. If you do not have the required permissions or resources are not used in your CM system you can skip this chapter as it does not apply to you.

### E.1.4.1 Creating a resource

You can create a new resource from two locations provided that you have the required permissions.

- The [resource dashboard](#):

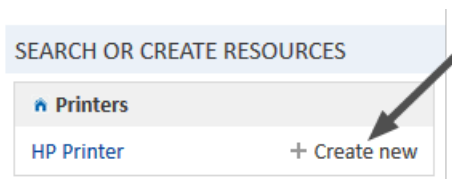


Figure 117: Creating a resource on the resource dashboard

- The [resource type page](#):

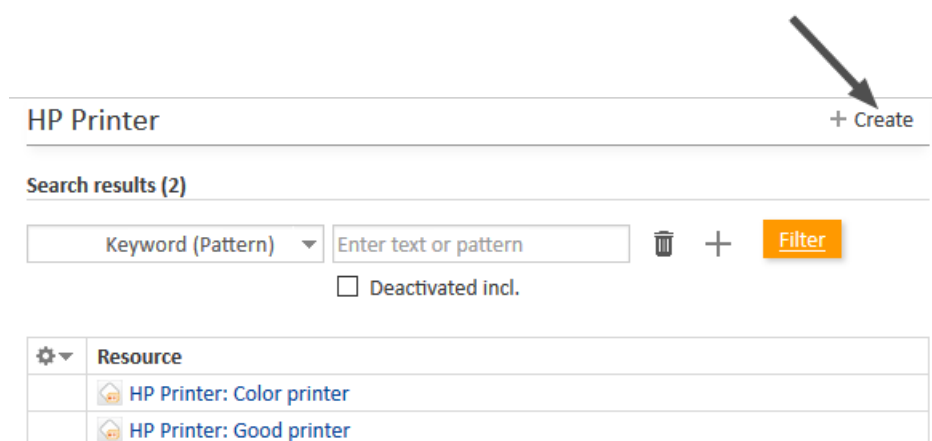



Figure 118: Creating a resource on the resource type page

In addition to these standard locations, it might be possible to create resources using activities, e.g., on a contact page. This depends entirely on the individual configuration of your CM system.

Please proceed as follows to create a new resource:

1. Locate the desired resource type.
2. Click the *Create new* link on the resource dashboard or click the *Create* link on the resource type page (see figures above).
3. Fill out the data on the *Create new resource* page. See [Data fields](#) for further information about how to fill out the fields.
4. Click *Create* to save the resource.

 When you create a new resource, some of the fields might activate the [Autocomplete Search](#) to check if there is already a matching resource. In this case, you can select one of the suggestions to open the respective resource page. Alternatively, you can ignore the suggestions and create the resource with the desired data.

### E.1.4.2 Accessing resources

In order to update a resource, you need to open its resource page. There are several ways to access the resource page of an existing resource:

- Opening a resource on the [resource type page](#).
- Searching for a resource using the [Quick Search](#) or the [Detailed Search](#).
- Opening a resource using the *Jump to resource* link in the context menu of a resource in the section for related resources of a contact page or a case.

### E.1.4.3 Editing resource data

If you have the required permissions, you can edit resource data in the [header section](#) and in the [details section](#).

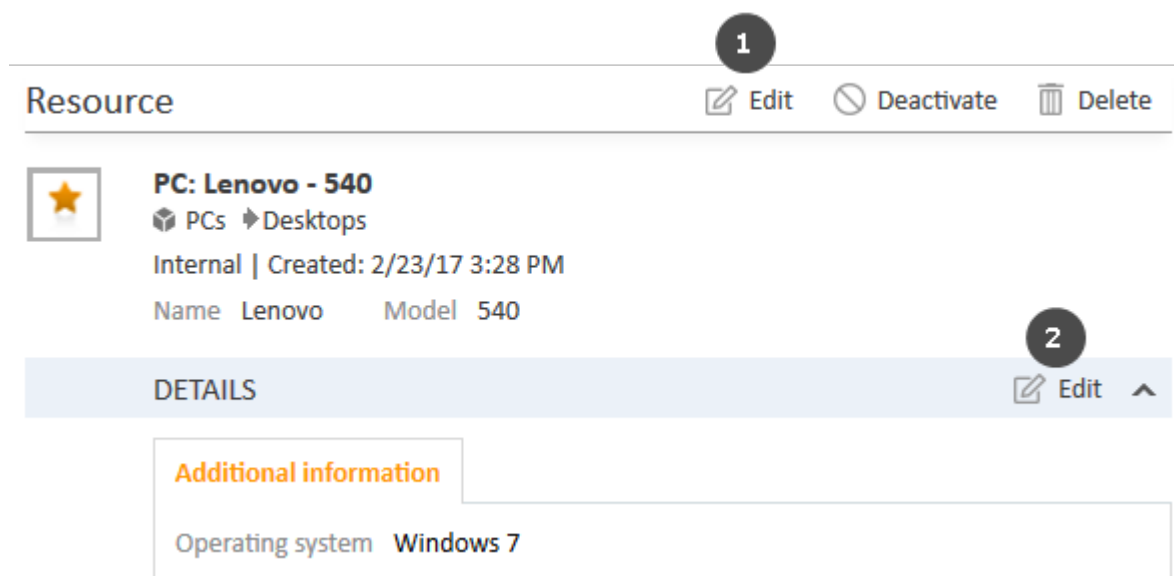


Figure 119: *Editing resource data*

- (1) Click the *Edit* link in the upper right corner of the header section
- (2) Click the *Edit* link in the upper right corner of the details section.

The section's background turns yellow to indicate that it is in edit mode. Edit the contact data as required (see [Data fields](#) for details about the different types of data fields). Click *Save changes* to save the new data. The section background turns gray again (view mode).

#### E.1.4.4 Editing comments and attachments

The [comments and attachments section](#) of the resource page allows you to add comments and attachments to the resource. The respective permissions are granted independently from the permissions to read and write resource data, so it is possible that you cannot view or edit this section.

You can use the comments and attachments section to collect information about the resource, e.g., adding the release notes to a resource representing a software product, or writing a comment about how to change the ink cartridges of a certain printer.

##### Adding attachments

To add an attachment, click the *Attachment* link in the header of the section. The section background turns yellow to indicate that it is in edit mode. If the section is already in edit mode, you can also add an attachment by clicking the *Attachment* tab.

NO COMMENTS AND ATTACHMENTS

Comments Attachments

New

1 Drop files or click to select files

File CM6-Release-Notes-6.10.5.pdf Delete

Description

2

File Order.docx Delete

Description

3 Add Cancel

List of attachments

Resource does not have any attachments.

Figure 120: Adding an attachment

Please proceed as follows to add an attachment:

- Specify the files to be uploaded by either:
  - Dragging and dropping them into the white area.
  - Clicking into the white area to open a file browser dialogue and selecting the files.
- The selected files are displayed in a list below the white area. Optionally, you can add a description in the *Description* field. Click the *Delete* link to remove a file from the list.
- Click the *Add* button to upload the files to the resource page.



The attachments are then displayed in the list of attachments below (still empty in the above figure).

The list of attachments provides the following information. You can filter the list using the drop-down boxes and text fields in the header:

- **File type**  
Indicates the file type of the attachment.
- **Name**  
Indicates the file name of the attachment. Click the file name to download the attachment.
- **Description**  
Indicates the description provided when the attachment was added, if any.
- **Date**  
Indicates the date when the attachment was added.
- **Added by**  
Indicates who added the attachment. This can be either a user (who uploaded the file) or a technical user (in case the file was automatically uploaded by the system).
- **Action**  
Provides links to the available actions. These are:
  - **Apply filters**  
Filters the list according to your selections in the header.
  - **Clear filters**  
Removes the filter, i.e., displays all entries.

You can delete an attachment by clicking the cross on the right. Click *OK* in the red field to confirm the removal of the attachment. You cannot undo the removal once you confirmed it.



The possible file formats, maximum file size, and whether attachments are searchable depend on the individual configuration of your CM system.

### Adding comments

To add a comment, click the *Comment* link in the header of the section. The section background turns yellow to indicate that it is in edit mode. If the section is already in edit mode, you can also add a comment by clicking the *Comment* tab. Enter the comment and click *Add*. The comment is then displayed in the list of comment below.

The list of comments provides the following information. You can filter the list using the drop-down boxes and text fields in the header:

- **Date**  
Indicates the date when the comment was added.
- **Added by**  
Indicates who added the comment. This can be either a user (who entered the comment) or a technical user (in case the comment was automatically created by the system).
- **Comment**  
Shows the comment.

- **Action**

Provides links to the available actions. These are:

- **Apply filters**  
Filters the list according to your selections in the header.
- **Clear filters**  
Removes the filter, i.e., displays all entries.

You can delete a comment by clicking the cross on the right. Click *OK* in the red field to confirm the removal of the comment. You cannot undo the removal once you confirmed it.

#### E.1.4.5 Performing resource activities

Resource activities allow you to perform certain actions for the current resource. You can find them in the *Activities* box next to the open resource page. Click the desired activity to perform the corresponding action.

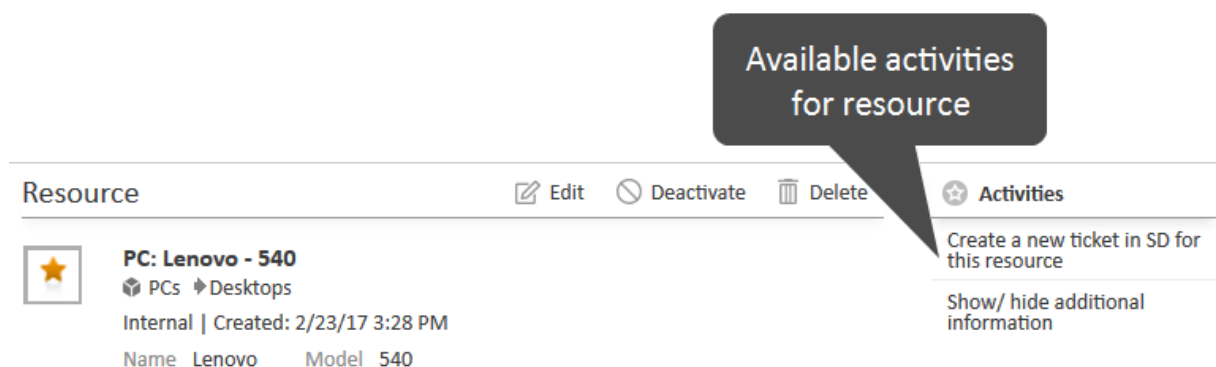



Figure 121: *Resource activities*

Examples for resource activities are:

- Create a new case for the resource.
- Create a new contact who is related to the resource.
- Update some resource data.

Resource activities can have a form which needs to be filled out before proceeding. See [Forms for activities](#) for further information.

 The available resource activities depend on the resource type and the individual configuration of your CM system. You can only perform resource activities if you have the required permissions to perform activities for this resource type.

#### E.1.4.6 Making resources unavailable

If a resource should not be used in the CM system anymore, you have two options to handle this situation:

- [Deactivating resources](#)
- [Deleting resources](#)

### Deactivating resources

To deactivate a resource, click the *Deactivate* link in the upper right corner of the resource page. The resource is then displayed in italics both on its resource page and on the pages of related objects (contacts, cases, other resources). The deactivation of a resource has the following effects:

Actions still possible	Actions not possible anymore
<ul style="list-style-type: none"> <li>• Editing resource data</li> <li>• Adding comments and attachments</li> <li>• Displaying the resource on the <a href="#">resource type page</a> (check the option <i>Deactivated incl.</i>)</li> <li>• Finding the resource in the Detailed Search using the option <i>Deactivated incl.</i></li> <li>• Reactivating the resource</li> <li>• Deleting the resource</li> </ul>	<ul style="list-style-type: none"> <li>• Finding the resource in the Quick Search, Detailed Search without the option <i>Deactivated incl.</i>, and Autocomplete Search.</li> <li>• Using the resource in relations</li> </ul>

### Deleting resources

To delete a resource, click the *Delete* link in the upper right corner of the resource page. If the resource has relations, you have to decide what should happen to the relations before you can delete the resource. There are two options:

- **Transfer the relations (1)**

You can select another resource of the same resource type to transfer the relations of the current resource to the selected resource. To do so, perform the following steps:

- Select the target resource using the [Autocomplete Search](#) in the field *Resource detail replacement lookup*.
- Click the *Transfer relations and delete* button. The selected resource replaces the current resource in all relations and the current resource is deleted.

- **Delete the relations (2)**

You can simply delete the relations of the resource together with the resource itself. To do so, click the *Delete with relations* button.

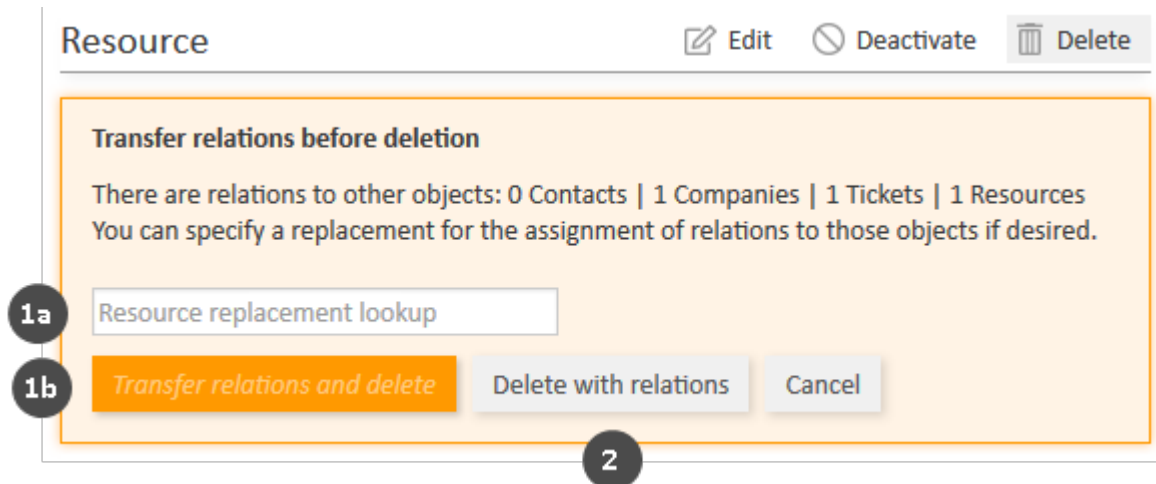


Figure 122: Deleting a resource

**i** A transfer of relations is only possible if it does not generate any conflicts, e.g., you cannot transfer relations to a resource which is already related to the same contact. In this case, an error message will be displayed and you have to delete the relations.

#### E.1.4.7 Making deactivated resources available again

You can make a deactivated resource, which is displayed in italics, available again by reactivating it. To do so, click the *Activate* link in the upper right corner of the resource page.

The following figure shows a deactivated resource (in italics) and the link to reactivate it.

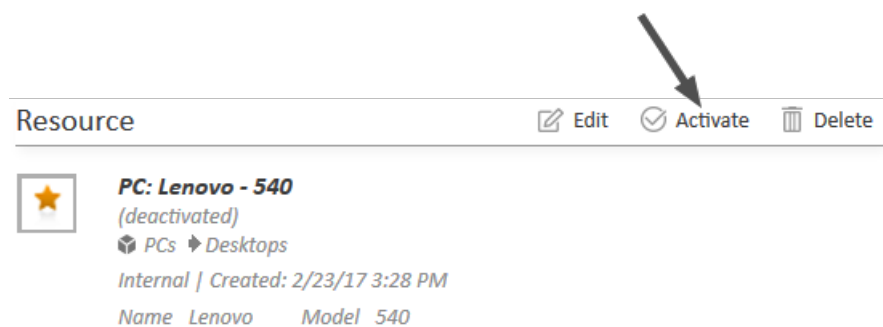


Figure 123: Reactivating a resource

#### E.1.4.8 Relations to cases, contacts, and resources

Three types of relations are possible for resources:

- Relations to other **resources** are displayed in the [section for related resources](#). They can be used to structure the resource pool. For example, you can link a computer to its installed software.
- Relations to **contacts** (companies and persons) are displayed in the [section for related contacts](#). They can be used to link contacts to their resources. For example, you can link a computer to the contact who uses it.

- Relations to **cases** are displayed in the [section for related cases](#). They can be used to link resources to the cases which refer to them. For example, you can link a printer to a case concerning a problem with this printer.

### Resource-resource relations

This chapter discusses the following:

- [Introduction](#)
- [Display of resource relations](#)
- [Adding a resource relation](#)
- [Editing the note of a resource relation](#)
- [Switching to the related resource](#)
- [Deleting a resource relation](#)

### Introduction

Resource-resource relations (for greater readability called *resource relations* in this section) can be used to establish links between resources. They allow you to structure your resource pool, e.g., by linking software to the computer where it is installed.

You can create relations based on the relation models which are configured in your CM system. The following is defined for each relation model:

- The **resource type**, i.e., which kind of resources can be linked to the resource.
- The **cardinality** of the relation, i.e., if you can link several resources of the same resource type to the resource.
- The availability of the *Note* field.
- Whether the relation name is displayed.
- Whether the relation is editable, i.e., whether it can be added, edited, and deleted in the Web Client.

### Display of resource relations

Resource relations are displayed in the [section for related resources](#) of the resource page. If no resource relations are set for the resource, the section is collapsed. You can expand it to add a relation by clicking the arrow icon in the section header. If there is at least one relation, the *Show* filter is displayed, where you can choose to see all possible relations (*All relations*) or only the relations which are set for the resource (*Only assigned relations*).

The layout depends on the selected [visibility level](#). The following figure shows the section for related resources with the visibility setting *Extended*. Each resource category is displayed in a box which contains the relations configured for this resource category. The resources are arranged below the name of the relation model. If no name has been configured for the relation, *Related* is displayed instead.

Click the relation name to display the related resources. You can display further details about the resource by clicking the resource name. Click the small arrow button next to the resource name to open the context menu of the resource which allows you to delete the relation and jump to the resource page.

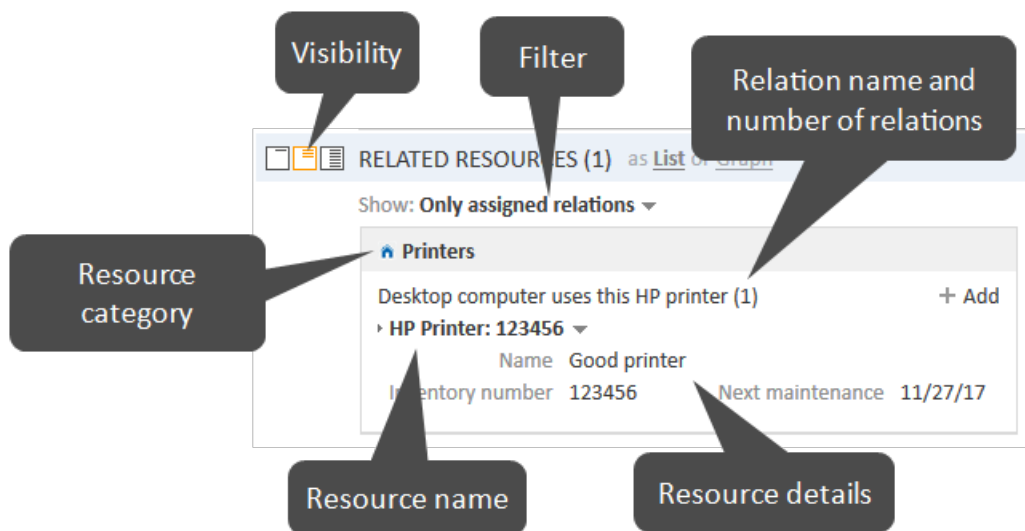



Figure 124: Resource relations

 You can also show a [relation graph](#) in this section.

### Adding a resource relation

Please proceed as follows to add a new resource relation.

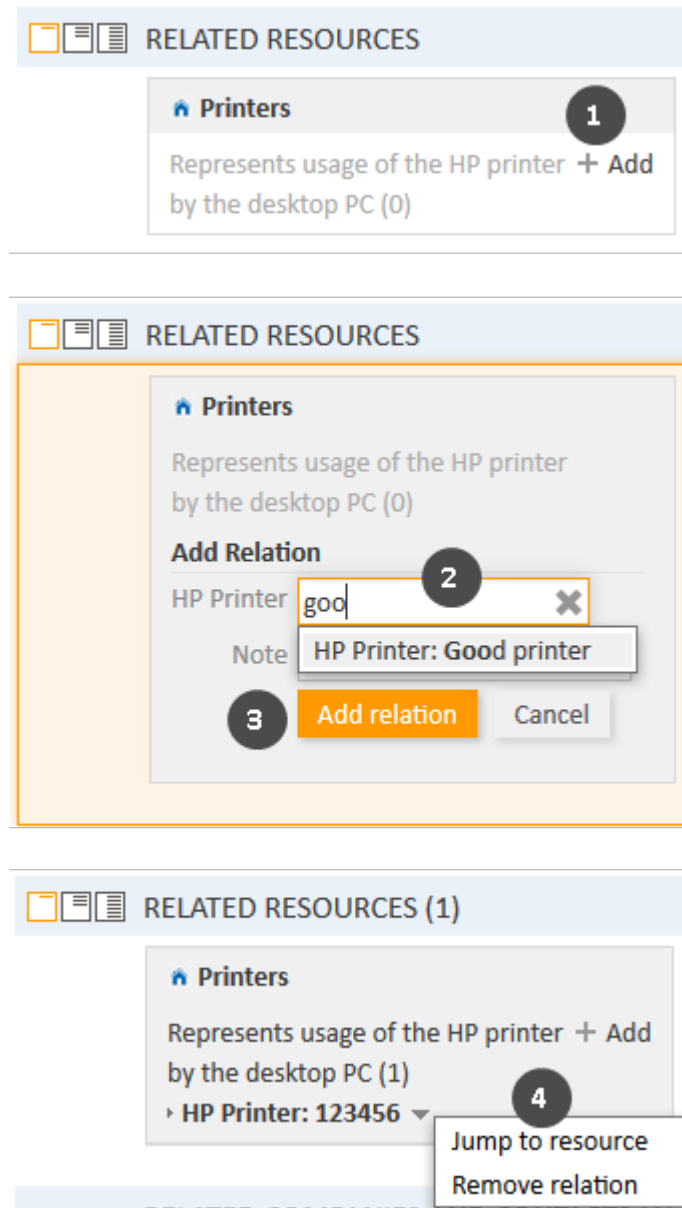



Figure 125: Adding a resource relation

1. Click the *Add* link next to the required relation name.
2. Start typing the name of the resource and select the desired resources from the suggestions of the [Autocomplete Search](#). Optionally, you can enter a note.
3. Click *Add relation*.
4. The resource is now linked to the current resource. You can click the link with the resource name to display further details about the resource. The amount of detail varies depending on the selected visibility level. Click the little arrow next to the resource to open its context menu.

 The action of adding or deleting a relation can trigger additional changes, e.g., the value of a data field can be updated. This depends on the individual configuration of your CM system.

### Editing the note of a resource relation


Click *Edit* next to *Note* to edit the relation's note. The *Edit* link is only displayed if you have selected the visibility level *Detail* (see [visibility level](#)).

### Switching to the related resource

You can view the corresponding resource page by clicking *Jump to resource* in the context menu.

### Deleting a resource relation

Click *Remove relation* in the context menu to delete the relation. Then, click *Yes* to confirm the removal of the relation. Note that the relation is also removed from the page of the related resource. You cannot undo the removal once you confirmed it.

 The action of adding or deleting a relation can trigger additional changes, e.g., the value of a data field can be updated. This depends on the individual configuration of your CM system.

## Resource-contact relations

This chapter discusses the following:

- [Introduction](#)
- [Display of contact relations](#)
- [Configuring the columns](#)
- [Adding a contact relation](#)
- [Editing the note of a contact relation](#)
- [Switching to the related contact](#)
- [Deleting a contact relation](#)

### Introduction

A resource-contact relation (for greater readability called *contact relation* in this section) defines the relation between this resource and a contact. Contact relations allow you, for example, to link your assets to the contacts (persons and companies) who use them. In an Help Desk process, these assets could be the computer and printer used by the contact or their contracts. You can also use contact relations to support the CRM functionalities of ConSol CM: For example you create a resource for a trade fair you attended and link this trade fair to all the contacts you met there. You can quickly access the pages of the related contacts from the resource page.

You can create relations based on the relation models which are configured in your CM system. The following is defined for each relation model:

- The **customer group** which the contact has to belong to.
- The level determines the type of contact used in the relation. This can be:
  - **Company**
  - **Person**
  - **Any** (either a person or a company)



- The **cardinality** of the relation, i.e., if you can link several resources to the contact, or several contacts to the same resource.
- Whether the relation name is displayed. If no relation name is displayed, the table heading states *Related*.
- Whether the relation is editable, i.e., whether it can be added, edited and deleted in the Web Client.

### Display of contact relations

The contact relations are displayed in the [section for related contacts](#) of the resource page. There is a table for each relation model. The heading states the name of the relation model, the target customer group, and the type of contact, which can be either company, or person, or any (1). If the type of contact is *any*, i.e., either a company or a person, there are two tabs: one for relations to persons and one for relations to companies (2).

The table contains the relations which were created for this relation model. You can configure the displayed column using the tool icon (3). The table usually contains a link to open the contact page (4), a link to edit the note of the relation (5) and an icon to delete the relation (6).

You can add a relation by clicking the *Add* link (7).

**RELATED COMPANIES AND CONTACTS (2)** as [List](#) or [Graph](#) + Add ^

**Related (Reseller)(Any)**

**Contact** **Company**

Contact	Date	Note	Actions
@ Skydiver, Mia	3/1/17 9:13 AM	Edit	✕

**Responsible Contact for the PC Desktop (End customers)(Contact)**

Contact	Date	Note	Actions
Mr Luke Skywalker	3/1/17 9:09 AM	Edit	✕

Figure 126: Contact relations of resources

The relations are displayed on the resource page and the related contact pages. Please note that the same relation can have a different name on the contact pages.

You can also show a [relation graph](#) in this section.

### Configuring the columns

You can resize the table columns by dragging each column to the desired width.

Open the context menu next to the wheel icon to configure the table columns. To add columns, enter the column name and select a suggestion from the [Autocomplete Search](#). You can remove columns by clicking the cross next to their name.

#### Adding a contact relation

Please proceed as follows to add a new contact relation.

The figure illustrates the process of adding a contact relation in four steps:

- Click **Add** in the header of the section for related contacts.
- Select the relation model from the drop-down list.
- Select the target contact using the [Autocomplete Search](#) in the field *Unassigned*. Optionally, you can enter a note in the field below.
- Click **Add relation** to create the relation to the selected contact.

Figure 127: Adding a contact relation

1. Click **Add** in the header of the section for related contacts.
2. Select the relation model from the drop-down list.
3. Select the target contact using the [Autocomplete Search](#) in the field *Unassigned*. Optionally, you can enter a note in the field below.
4. Click **Add relation** to create the relation to the selected contact.

The following figures show the resulting relation:

- On the resource page of *PC Dell X390*, you can see the relation of type *Responsible Contact for the PC Desktop* to the person *Luke Skywalker* from the customer group *End contacts* (1).

- On the contact page of *Luke Skywalker*, you can see the relation of type *This person is responsible for the PC* to the resource *PC Dell X390* from the resource category *PCs* (2).

1 RELATED COMPANIES AND CONTACTS (1) as [List](#) or [Graph](#) + Add ^

Responsible Contact for the PC Desktop (End customers)(Contact)

⚙	Contact	Date ↕	First name ↕	Last name ↕	Actions
	Mr Luke Skywalker	3/1/17 9:09 AM	Luke	Skywalker	✕

2 RELATED RESOURCES (1) as [List](#) or [Graph](#)

PCs
 

This person is responsible for the  
 PC (1)  
 ▶ PC: Dell - X390 ▼

Figure 128: Resulting relations

The action of adding or deleting a relation can trigger additional changes, e.g., the value of a data field can be updated. This depends on the individual configuration of your CM system.

#### Editing the note of a contact relation

Click *Edit* in the *Note* column of the relation to add or edit its note. The note is optional. If the *Note* column is not displayed, you have to add it first (see [Configuring the columns](#)).

#### Switching to the related contact

You can switch to the contact page of the related contact by clicking his name in the column named *Contact* or *Company*. If you click another column, a preview window is opened where you can choose to open the contact page.

#### Deleting a contact relation

Click the cross in the *Actions* column to delete the relation. Then, click *OK* in the red field to confirm the removal. Note that the relation is also removed from the page of the related contact. You cannot undo the removal once you confirmed it.

The action of adding or deleting a relation can trigger additional changes, e.g., the value of a data field can be updated. This depends on the individual configuration of your CM system.

#### Resource-case relations

This chapter discusses the following:

- [Introduction](#)
- [Display of case relations](#)

- [Configuring the columns](#)
- [Adding a case relation](#)
- [Editing the note of a case relation](#)
- [Opening the case](#)
- [Deleting a case relation](#)

### Introduction

A resource-case relation (for greater readability called *case relation* in this section) defines the relation between this resource and a case. Case relations allow you to link your assets to the cases concerning them. For example, you can link an incident case to the printer which caused the problem or a service case to the contact's SLA. You can quickly access the cases from the resource page.

You can create relations based on the relation models which are configured in your CM system. The following is defined for each relation model:

- The **process** which the case has to be in.
- The **cardinality** of the relation, i.e., if you can link several resources to the same case, or several cases to the same resource.
- Whether the relation name is displayed.
- Whether the relation is editable, i.e., whether it can be added, edited and deleted in the Web Client.

### Display of case relations

Case relations are displayed in the [section for related cases](#) of the resource page. The table contains the relations which were created for this resource. You can choose to display all cases, open cases or closed cases by selecting the corresponding value in the filter (1). To configure the table columns, click the tool icon (2) and select the desired columns. You can order the columns by dragging the column header to the required position.

The table usually contains a link to open the case (3), the name of the relation (4) and an icon to delete the relation (5). Click a table row to open the case preview. The case preview contains buttons to display more case data (6), open the case (7) and display the preview of the next case (8).

RELATED TICKETS (1) as <a href="#">List</a> or <a href="#">Graph</a> <span>+ Add</span> <span>^</span>					
All ▾					
	Date ▾	Name ▾	Relation ▾	Subject ▾	Actions
	3/1/17 9:35 AM	100006	Tickets concerning this PC	Computer is slow	
	Latest comment	2/21 3:24 PM			
	My computer is very slow				

Figure 129: Case relations

You can also show a [relation graph](#) in this section.

#### Configuring the columns

You can resize the table columns by dragging each column to the desired width.

Open the context menu next to the wheel icon to configure the table columns. To add columns, enter the column name and select a suggestion from the [Autocomplete Search](#). You can remove columns by clicking the cross next to their name.

#### Adding a case relation


Please proceed as follows to add a new case relation.

The figure consists of three sequential screenshots of the 'RELATED TICKETS' section in the ConSol CM interface, illustrating the steps to add a case relation.

- Step 1:** The 'RELATED TICKETS' header shows a '+ Add' link with an upward arrow icon.
- Step 2:** The 'Add relation' dialog is open. It shows 'PC: Dell - X390' and a dropdown menu with 'Choose One' selected. Below the dropdown are 'Add relation' and 'Cancel' buttons.
- Step 3:** The 'Add relation' dialog is shown with the dropdown menu open, displaying 'Tickets concerning this PC'. The 'Add relation' button is highlighted.
- Step 4:** The 'Add relation' dialog is shown with the dropdown menu open, displaying '100006 Computer is slow'. The 'Add relation' button is highlighted.

Figure 130: Adding a case relation

1. Click the *Add* link in the section header.
2. Select the desired relation model from the drop-down list.
3. Start typing the name of the case and select the desired case from the suggestions of the [Auto-complete Search](#) in the *Unassigned* field. Optionally, you can enter a note.
4. Click *Add relation*.

 The action of adding or deleting a relation can trigger additional changes, e.g., the value of a data field can be updated. This depends on the individual configuration of your CM system.

### Editing the note of a case relation

Click *Edit* in the *Note* column of the relation to add or edit its note. The note is optional. If the *Note* column is not displayed, you have to add it first (see [Configuring the columns](#)).

### Opening the case

You can open the related case by clicking its number in the column *Name*. If you click another column, a preview window is opened where you can choose to open the case (see figure in section [Display of case relations](#)).

### Deleting a case relation

Click the cross in the *Actions* column to delete the relation. Then, click *OK* in the red field to confirm the removal. Note that the relation is also removed from the page of the related case. You cannot undo the removal once you confirmed it.



The action of adding or deleting a relation can trigger additional changes, e.g., the value of a data field can be updated. This depends on the individual configuration of your CM system.

## E.2 CM/Track

This chapter discusses the following:

E.2.1 About CM/Track .....	233
E.2.2 CM/Track from the customers' point of view .....	233
E.2.3 CM/Track from the users' point of view .....	233
E.2.4 Configuring CM/Track for customers .....	234
E.2.5 Considering CM/Track when working with cases .....	237
E.2.6 CM/Track from the customers' point of view .....	240



## E.2.1 About CM/Track

CM/Track provides your (internal and external) customers access to their cases in your company's ConSol CM system. The customers receive a [CM/Track login](#), i.e., a user name and a password, which they can use to log in to CM/Track. In CM/Track they have access to their cases and can create new cases. Their access permissions are defined in a [CM/Track profile](#) which is assigned to the customer in the Web Client.

The following screenshot shows the standard layout of CM/Track. Depending on the individual configuration of your CM system, CM/Track may have a different layout and/or include additional features.

## E.2.2 CM/Track from the customers' point of view

Your customers can log in to CM/Track to access their cases. The following actions are possible in a standard installation of CM/Track, provided that the customers have the required permissions:

- viewing the case list
- viewing the details of cases
- adding comments to cases
- adding attachments to cases
- creating new cases
- searching the FAQs



Additional features may be available through a customization of your CM system.

Please see [CM/Track from the customers' point of view](#) for a detailed explanation of how your customers work in CM/Track.

## E.2.3 CM/Track from the users' point of view

You might deal with CM/Track in the following contexts:

- You manage CM/Track accounts for your customers, see [Configuring CM/Track for customers](#).
- You work on cases which your customers access using CM/Track, see [Considering CM/Track when working with cases](#).

## E.2.4 Configuring CM/Track for customers

This chapter discusses the following:


- [Creating a CM/Track account](#)
- [Resetting the password](#)

### E.2.4.1 Creating a CM/Track account

Your customers need CM/Track accounts in order to be able to log in to CM/Track. CM/Track accounts can only be created for **contacts**, not for companies. You can create a CM/Track account for all contacts who belong to a customer group which has CM/Track enabled. In this case the customer data contains fields for the user name and password.

A CM/Track account consists of two elements:

- **CM/Track login (1)**  
The CM/Track login consists of a **user name** and a **password**, which you have to define in the contact data. The customer uses his CM/Track login to access CM/Track.
- **CM/Track profile (2)**  
The CM/Track profile is created by the CM administrator. It contains the **permissions** for the contact. These permissions determine which cases the contact can see (only his own cases or all the cases of contacts who belong to his company) and what actions he is allowed to carry out. One CM/Track profile can be assigned to several contacts. There can be several CM/Track profiles in your CM system, but a contact can only have one CM/Track profile.

 Your CM system can be configured either for automatic or for manual assignment of the CM/Track profile. If the automatic assignment has been configured, the field for selecting the profile is not displayed.

The following figure illustrates the different elements of the CM/Track account.

**Web Client (internal side)**

@ Last name Skydiver First name Luke  
 Email luke@consol.de Phone 0211/1235678  
☐ VIP?  
 1 CM/Track login luke CM/Track password .....  
 2 Reseller, Track X  
 Save changes Cancel

**CM/Track (external side)**

Please sign in

Username  
 Password  
[Forgot your password?](#)  
 Sign in

Figure 131: CM/Track account

- **CM/Track user**

Enter the user name in the field for the CM/Track user. In the above example the field is called *CM/Track Login*. It probably has another name in your CM system.



The user name has to be unique. Every customer in your CM system needs to have a different user name.

- **CM/Track password**

Enter the password in the field for the CM/Track password. In the above example the field is called *CM/Track Password*. It probably has another name in your CM system. For security reasons, the password is displayed as dots and its value is not written to the case history.


- **CM/Track profile**

Select the CM/Track profile from the *Track user* field. The contact cannot log in without a CM/Track profile.



The *Track user* field is only available if your system is configured for manual selection of the CM/Track user profile. If the field is not available, the user profile is assigned automatically.

Once you have created the CM/Track account, you need to communicate the CM/Track login to your customer, so he can use it to access CM/Track.

-  Depending on the individual configuration of your CM system, CM/Track accounts may be created automatically. This can happen in two cases:
- The CM/Track accounts are imported automatically into the system.
  - The customers create their own CM/Track accounts (requires an extension of the CM system).

#### Using LDAP for authentication

The CM system can be configured to use LDAP for the authentication of customers in CM/Track. This option is used mostly for internal customers who belong to the same company. When LDAP authentication is enabled, the CM/Track user name and password are probably the same as the ones the contact uses for his general system login.

#### E.2.4.2 Resetting the password

It can happen that a customer forgets his password. For security reasons the password is displayed as dots in the Web Client, so you cannot know an existing password. Depending on the individual configuration of your CM system, there are two ways to handle this situation:

- The **user resets the password** using the Web Client. To do so, proceed as follows:
  1. Open the contact page of the respective customer.
  2. Delete the current password in the *CM/Track password* field and enter a new one.
  3. Click *Save changes* and communicate the new password to the customer.
- The **customer resets his password** (only if your CM system supports this option). Tell the customer to proceed as follows:
  1. The customer opens the login screen of CM/Track.
  2. The customer clicks the *Forgot your password?* link.
  3. The customer will receive an email with a link to reset the password.
- The **password is managed in LDAP** (only if the customer logs in to CM/Track using LDAP). In this case, neither a user nor the customer can reset the password. Tell the customer to contact his administrator.

## E.2.5 Considering CM/Track when working with cases

This chapter discusses the following:

- [Visibility of comments in CM/Track](#)
- [Actions of customers in CM/Track](#)

You work with the Web Client and do not interact directly with CM/Track. Nevertheless, you should take CM/Track into account when working with cases because some of your actions have an impact on what your customers see in CM/Track.

### E.2.5.1 Visibility of comments in CM/Track

Usually, your customers can see the case data in the header and Details section. The visibility of the case history entries, i.e., comments, attachments, and emails, is controlled by [classes of text](#). The customers can see the entries which are highlighted with a specific class of text. The name, icon and, color of this class of text depend on the individual configuration of your CM system.

The following screenshot shows an example of such a class of text.

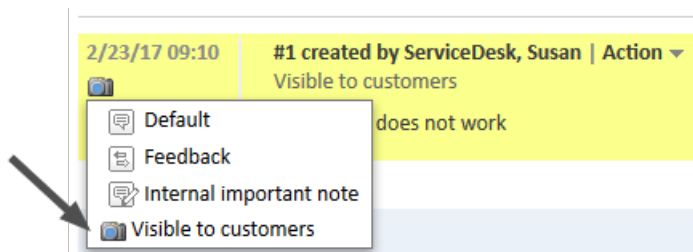


Figure 132: *Class of text assigned to a comment*

In your own CM system, the class of text probably has another name, icon, and color. There can also be several different classes of text which can be used to make an entry visible to the customers. Depending on the business process, classes of text can be applied automatically by the system. Usually, the comments and attachments which the customer adds using CM/Track are automatically highlighted with such a class of text, so the customer is able to see his own entries.



Only assign such a class of text to an entry that should be visible to your customer. Do not use it for internal notes!

### E.2.5.2 Actions of customers in CM/Track

Customers can carry out two actions in CM/Track which can influence your work in the Web Client:

- [Customers create new cases](#)
- [Customers add content to cases](#)

#### Customers create new cases

Customers can create new cases using CM/Track provided that their CM/Track profile contains the required permissions. You can view and handle the cases created by the customers in the same way as any other case. The only difference is that the customer who created the case is already added as the case's main customer and the case contains the data provided by the customer.

**Ticket** ✓ Accept ✎ Edit 📄 Clone 🖨 Print

**100393** **Please install Office 2013 on my computer**  
 HelpDesk 1st Level 🔍 Qualify 👤 Unassigned 📅 5/13/16 12:10 PM  
 HD Priority **normal**  
 Reaction time **5/13/16**  
 Category **Software | Office**

**CUSTOMERS (1)** + Add ^

**Main**  
@ **Skywalker,Luke (0211/1231666)** ▼ **Reseller**

**NO ADDITIONAL ENGINEERS** + Add ^

**NO RELATIONS** + Add ^

**CALENDAR** Add appointment Refresh ▼

**HISTORY** 💬 Comment ✉ E-Mail 📎 Attachment 🕒 Time booking ^

**Communication only** ▼ **Newest entries first** ▼

**5/13/16 12:10** 📎 **#1 created by luke | Action** ▼  
 Visible to customer

Dear support team,

Please install the new version of Microsoft Office on my computer.

Luke Skywalker

**NO ATTACHMENTS** ^

Figure 133: Case created in CM/Track

### Customers add content to cases

Customers can add comments and attachments using CM/Track. You can see the comments and attachments in the Web Client as soon as the customers save them. Usually, they are already highlighted with a class of text, so the customers can see their own comments and attachments in CM/Track.

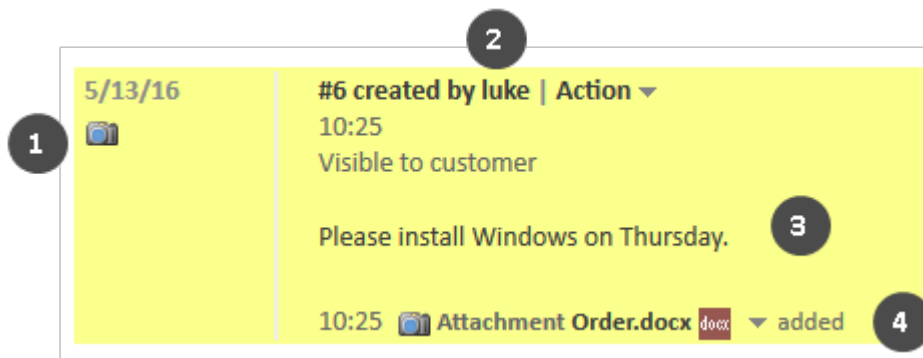



Figure 134: Comment and attachment from CM/Track

- Icon for class of text (1)
- User name of the customer who added content (2)
- Comment entered by the customer (3)
- Attachment uploaded by the customer (4)

## E.2.6 CM/Track from the customers' point of view

This chapter discusses the following:


- [Logging in to CM/Track](#)
- [Viewing the welcome page](#)
- [Viewing the case list](#)
- [Filtering the case list](#)
- [Viewing a case](#)
- [Adding content to a case](#)
- [Performing workflow activities for a case](#)
- [Creating a new case](#)
- [Searching the FAQs](#)
- [Changing the password](#)

 This section deals exclusively with the external side of CM/Track, i.e., how your customers work with CM/Track. Please see [Configuring CM/Track for customers](#) and [Considering CM/Track when working with cases](#) for your tasks concerning CM/Track. You do not need to log in to CM/Track, you always work with the Web Client.

### E.2.6.1 Logging in to CM/Track

The CM/Track login page can be embedded into your company's website or can be a website on its own. Your CM administrator can tell you the URL.

Customers can log in to CM/Track by providing their user name and password. These login data are part of their [CM/Track account](#).

 It depends on the configuration of your CM system, if the *Forgot your password?* link is available.



### E.2.6.2 Viewing the welcome page

After logging in, the welcome page with the following elements is displayed:

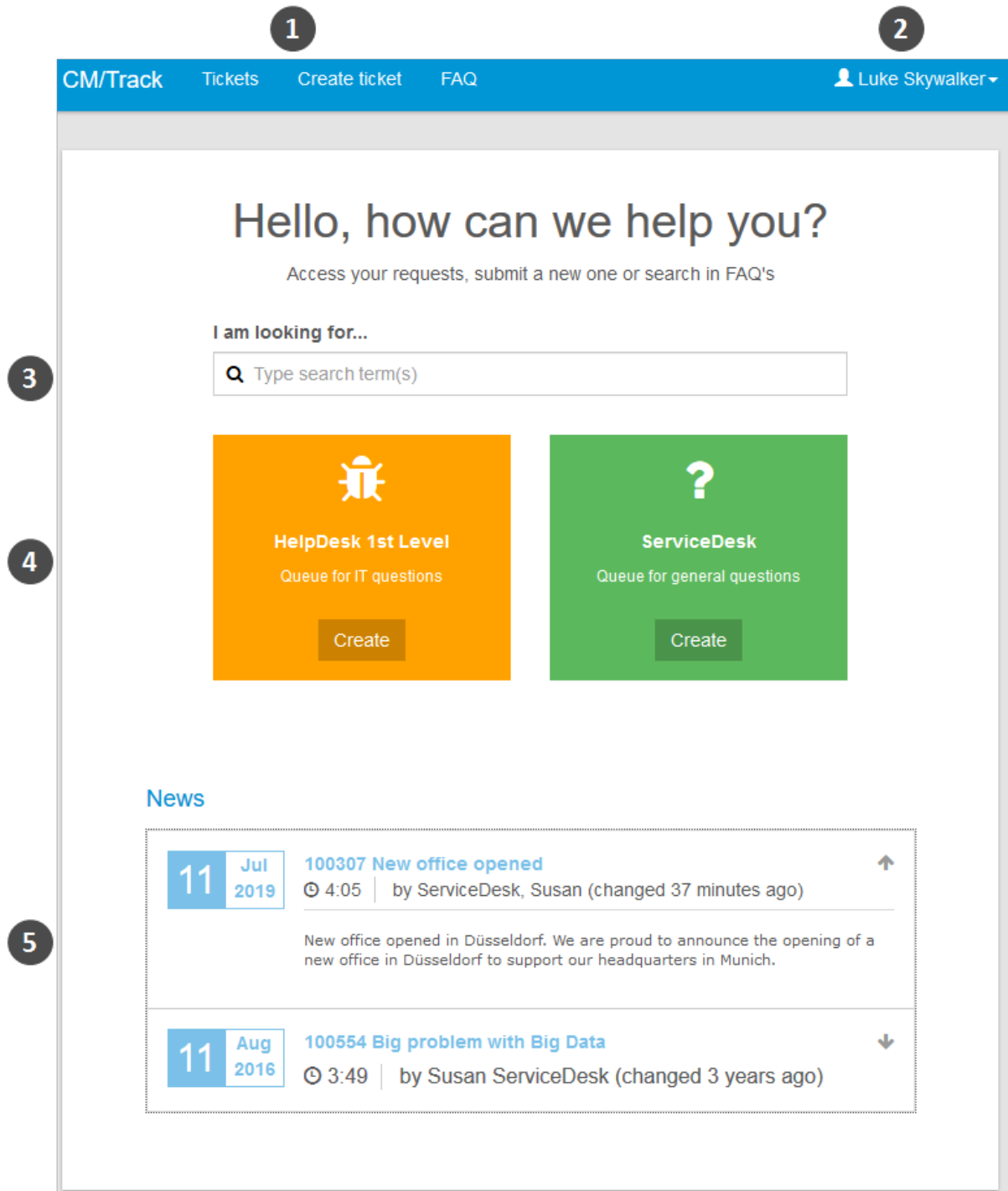


Figure 135: Welcome page in CM/Track

The menu bar (1) contains links to different features. The available links depend on the individual configuration of your CM system. The following links are available in a standard setup:

- **Tickets**  
Opens the overview with the case list.

- **Create ticket**  
Opens the screen where the customer can create a new case.
- **FAQ**  
Opens the FAQ search screen.

The name of the current user is displayed next to the menu bar on the right side (2). The customer can click his name to open a drop-down menu containing a logout link. Depending on the configuration of the CM system, a link to change the password might be available as well.

The main panel contains a search bar (3) and tiles (4). There is one tile for each process in which the customer can create cases. The *Create* button in the tile redirects the customer to the *Create ticket* page where the respective process is preselected. The search bar allows the customer to search his cases.

Optionally, CM/Track can be configured to display news (5). If the news feature is configured, the customers can view the news text by clicking the header of the respective entry.

### E.2.6.3 Viewing the case list

The case list is opened by clicking the *Tickets* link in the menu bar. It shows the cases which the customer has access to and includes several options for filtering, sorting, and navigating the case list.

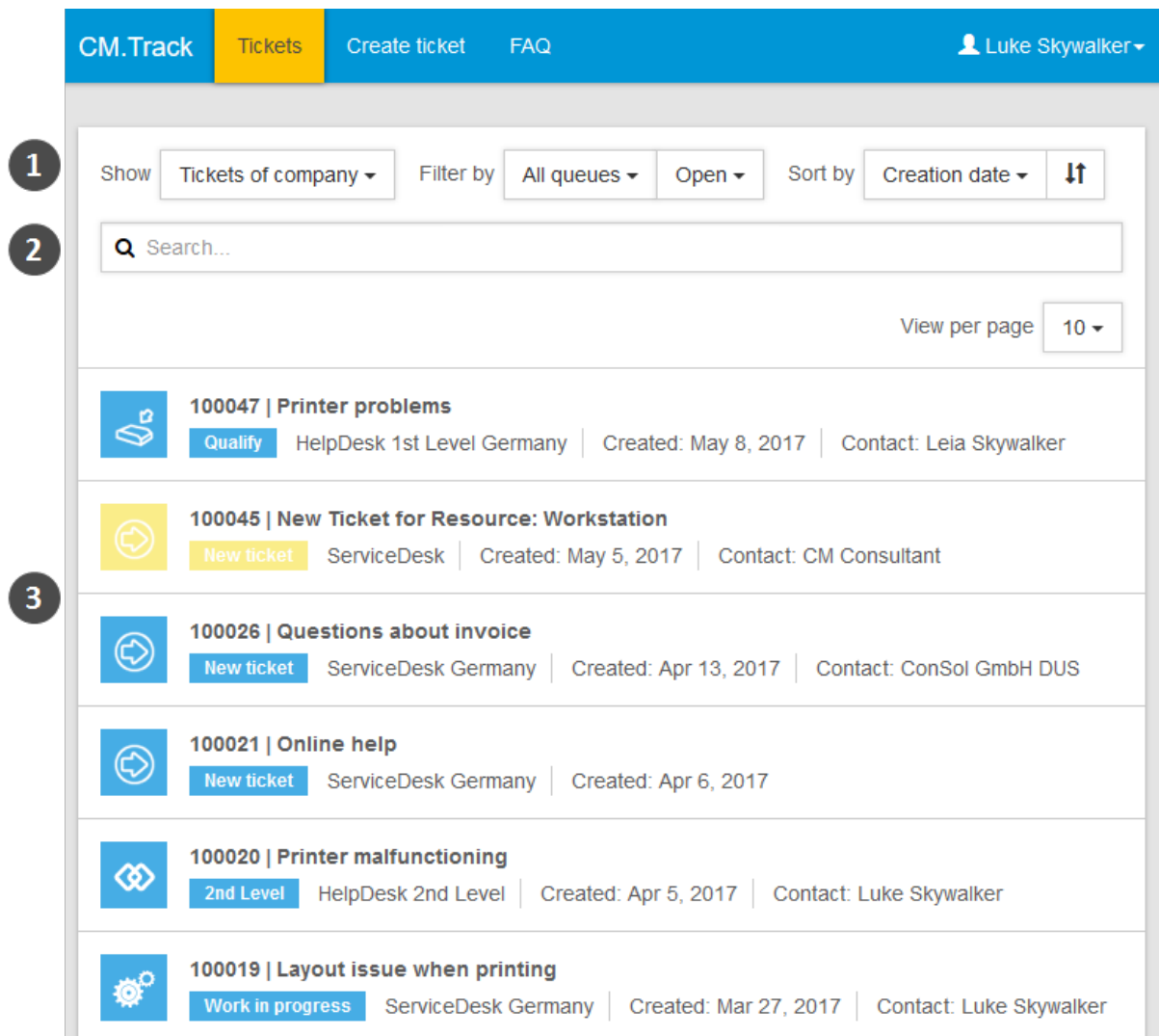


Figure 136: Case list in CM/Track

Above the case list (3), a section with several filtering, sorting, and navigation options is displayed (1). The customer can set the following options:

- **Show**

Determines whose cases are displayed in the case list. The available options are:

- **My tickets**

Only cases of the current customer.

- **Tickets of company**

Cases of the current customer, another customer of his company, or his company. (The availability of this option depends on the CM/Track profile assigned to the customer.)



This option is only displayed if the customer is allowed to see the cases of his company.

- **Filter by**

Determines which cases are to be displayed in the case list. The available options are:

- **All queues**

The case list shows cases from all processes which the customer has access to. Alternatively, the customer can select one process.

- **Open + Closed**

The case list shows open and closed cases.

- **Open**

The case list shows only open cases.

- **Closed**

The case list shows only closed cases.

- **Sort by**

Determines how the cases are sorted in the case list. The customer selects the element to be considered for sorting from the drop-down list. The sorting order can be changed by clicking the sorting order button (two arrows). The available options are:

- **Queue**

Sorts the cases by process name.

- **Creation date**

Sorts the cases by creation date.

- **Subject**

Sorts the cases by subject.

- **ID**


Sorts the cases by case number.

- **Scope**

Sorts the cases by process and scope. (The scopes are usually sorted according to their position in the workflow.)

- **Search (2)**

Searches the case subject, comments, attachments (if configured), and indexed case fields. The search results are combined with the selected filters, i.e., only cases matching both the search and the filters are displayed.

 The availability of the case fields for customers in CM/Track is not considered during the search. This means that the customer can find cases due to values of case fields which are then not displayed in CM/Track.

For each case the following information is provided:

- Case icon (1)
- Case number (2)
- Subject (3)
- Scope (4)
- Process (5)
- Creation data (6)
- Main customer (7) - only displayed if the filter *Tickets of company* is selected

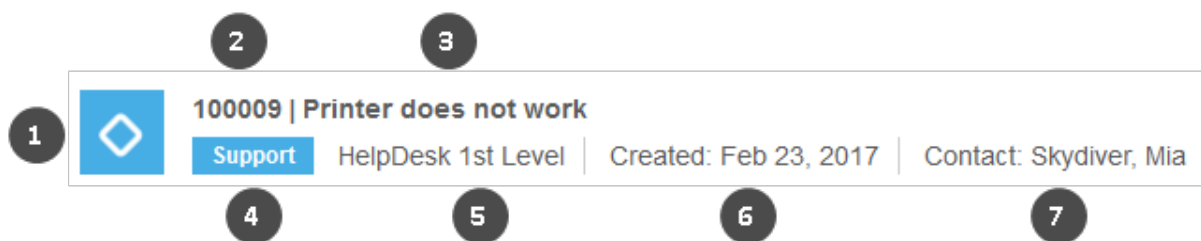


Figure 137: Details of an entry in the case list

#### Filtering the case list

The customers can filter the case list by entering a search term into the search bar located above the cases. The case list is filtered automatically to display only those cases which contain the search term in the case number, subject, comments, attachments or case fields. It depends on the individual configuration of your CM system which case fields are searched and if attachments are searched.

#### Scope of the case list

The cases displayed in the case list depend on the [CM/Track profile](#) which you assigned to the CM/Track account. Depending on the permissions included in the profile, the customer can see either:

- **Own cases**  
All cases where the customer is the main customer or an additional customer (filtering option *My tickets*).
- **Company cases**  
All cases where the customer, another contact of the company which the customer belongs to, or the company itself is the main customer or an additional customer (filtering option *Tickets of company*).

### E.2.6.4 Working with cases

#### Viewing a case

Customers can view the details of a case by opening the case. They just have to click the row of the case in the case list. The case details contain the basic case data at the top (1) and the additional case data in the *Additional information* section (2). The *Add a comment / attachment* button (3) is located

below the case data. The customers can click this button to add comments and attachments. The comment and attachment history (4) is displayed at the bottom of the page. It also includes emails (not shown in the figure below).

**1** 100012 | Please install Windows 10 on my computer  
Qualify HelpDesk 1st Level Created: Jun 10, 2020

**2** Additional information

Category	Priority	Reaction time
Software/Operating systems/Windows 10	normal	Jun 10, 2020

**3** + Add a comment / attachment

**4** Comment and attachment history:

- Jun 10, 2020 09:33 by Susan ServiceDesk  
The technician will perform the installation on Thursday at 10am.
- Jun 10, 2020 09:32 by Mia Skydiver (Spaceship Ltd)  
Order.docx
- Jun 10, 2020 09:32 by Mia Skydiver (Spaceship Ltd)  
Please install Windows 10 on my computer.

Figure 138: Case details

The customer can return to the overview containing the case list by clicking *Tickets* in the menu bar.

#### Adding content to a case

Customers can add comments and attachments to their cases using CM/Track. To do so, they have to open the respective case and click the *Add comment / attachment* button. This opens the editor shown in the following figure.

**Add a comment / attachment**

**1** Please install Windows on Thursday.

**2** Drop files or click to select files

**3** Order.docx  
Description

Save Cancel

Figure 139: Editor to add content to a case

The customer can perform the following actions:

- **Write a comment (1)**  
The customer can use the rich text editor to enter his comment.
- **Add an attachment (2)**  
The customer can click the *Drop files or click to select files* area to select a file from the file system. Alternatively, he can drag-and-drop files into this area. The uploaded file (3) is displayed below (here *Order.docx*). Optionally, a description can be entered. The customer can remove the file by clicking the X icon. It is possible to add several files at once.

The customer has to click *Save* to save his changes. Usually, the comments and attachments are directly visible in CM/Track.

The comments which were added by the customer have a person icon instead of a bubble icon. The entry's author is displayed with a blue background if the entry was added by the current customer. Otherwise, the background is gray.



Figure 140: Added content visible in the case history

You can see your customers' comments and attachments in the Web Client, see [Customers add content to cases](#).

#### Performing workflow activities for a case

Customers can perform workflow activities to move cases to the next step in the business process. Usually, the ConSol CM system is configured in a way that only some specific workflow activities are available to the customers. For example, the customers might be able to close their cases or to provide feedback, but they do not see any activity related to the internal processing of their request, e.g., requests for approval or questions to other teams.

The customers have to carry out the following steps to perform a workflow activity:

1. The customer clicks the workflow activity located in the upper right corner of the case details. Depending on the number of available activities, a drop-down list is displayed.
2. If the workflow activity has an ACF, the customer fills out the ACF and clicks *Save*.

A green success message is displayed after the activity has been executed successfully.

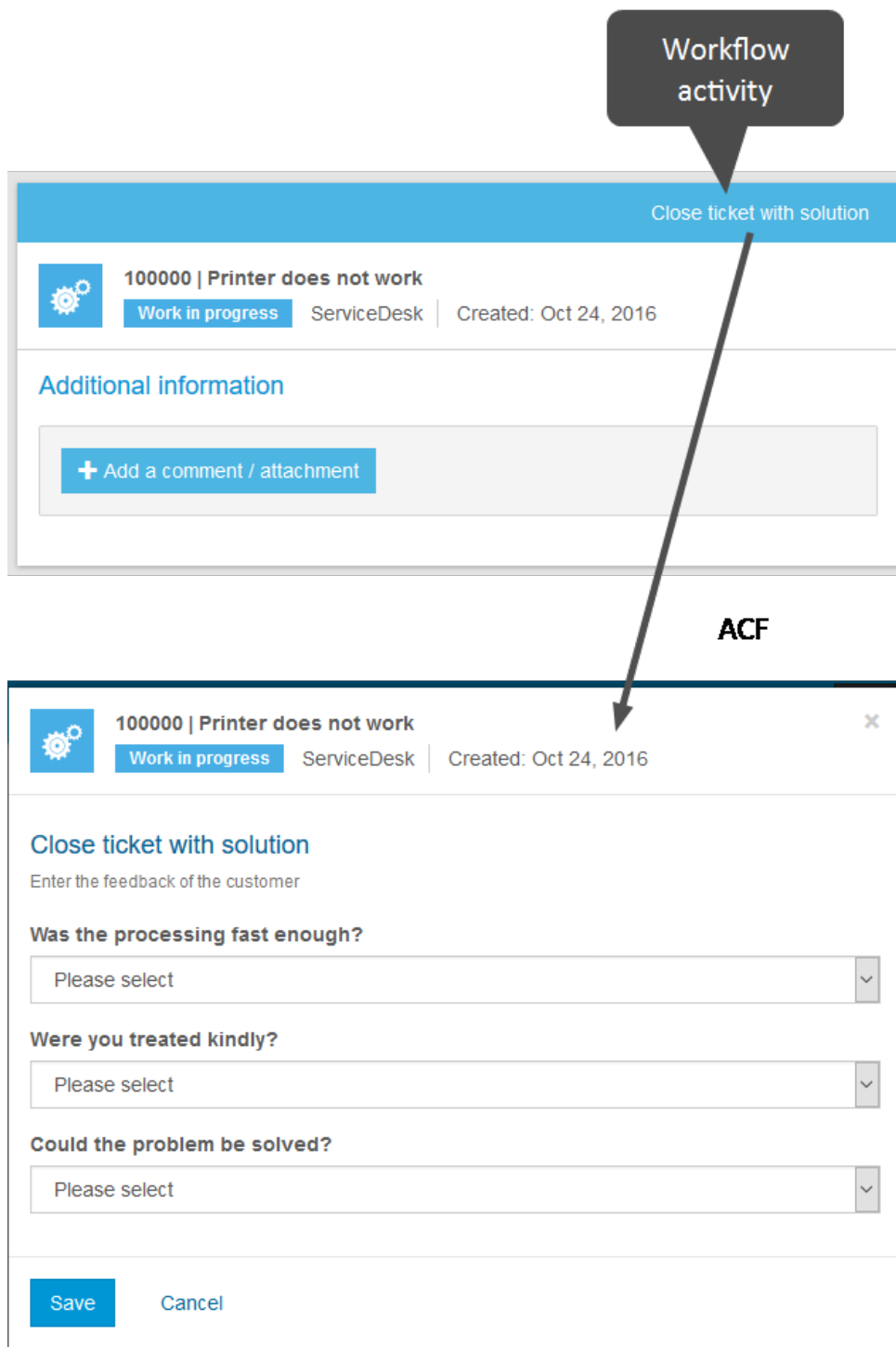


Figure 141: Performing a workflow activity with ACF in CM/Track



### Creating a new case

Customers can create new cases using CM/Track provided that their CM/Track profile contains the required permissions. They have to carry out the following steps:

1. The customer clicks *Create ticket* in the main menu.
2. The customer fills out the *Create ticket* screen.
  - Subject (1) (mandatory)
  - Queue (2) (mandatory)
  - Data fields (3)
  - Comment (4)
  - Attachment (5) (optional)
3. The customer clicks the *Create Ticket* button to save the case.


Figure 142: *Creating a new case in CM/Track*

You can see the new case in the Web Client, see [Customers create new cases](#).

**i** In the standard configuration, the customer sees the same fields in CM/Track as you see in the Web Client.

### E.2.6.5 Searching the FAQs

FAQs (Frequently Asked Questions) help your customers to find answers to common questions by themselves. FAQs are managed as cases within your CM system, where FAQ cases are located in a special FAQ process. In contrast to normal cases, which are visible to their customers only, FAQ cases are visible to **all** customers in CM/Track. FAQ cases can contain solutions to known problems or instructions on common tasks.

 It depends on the individual configuration of your CM system whether the FAQ functionality is available.

Your customers can search the FAQ by proceeding as follows:

- The customer clicks *FAQ* in the menu bar.
- On the FAQ screen, the customer selects a process, enters a search pattern, and clicks the *Search* button (1). If the customer does not enter a search pattern, all cases in the selected process are displayed.
- The matching FAQ cases are displayed in the case list (2) and the customer can click a case to open its details.

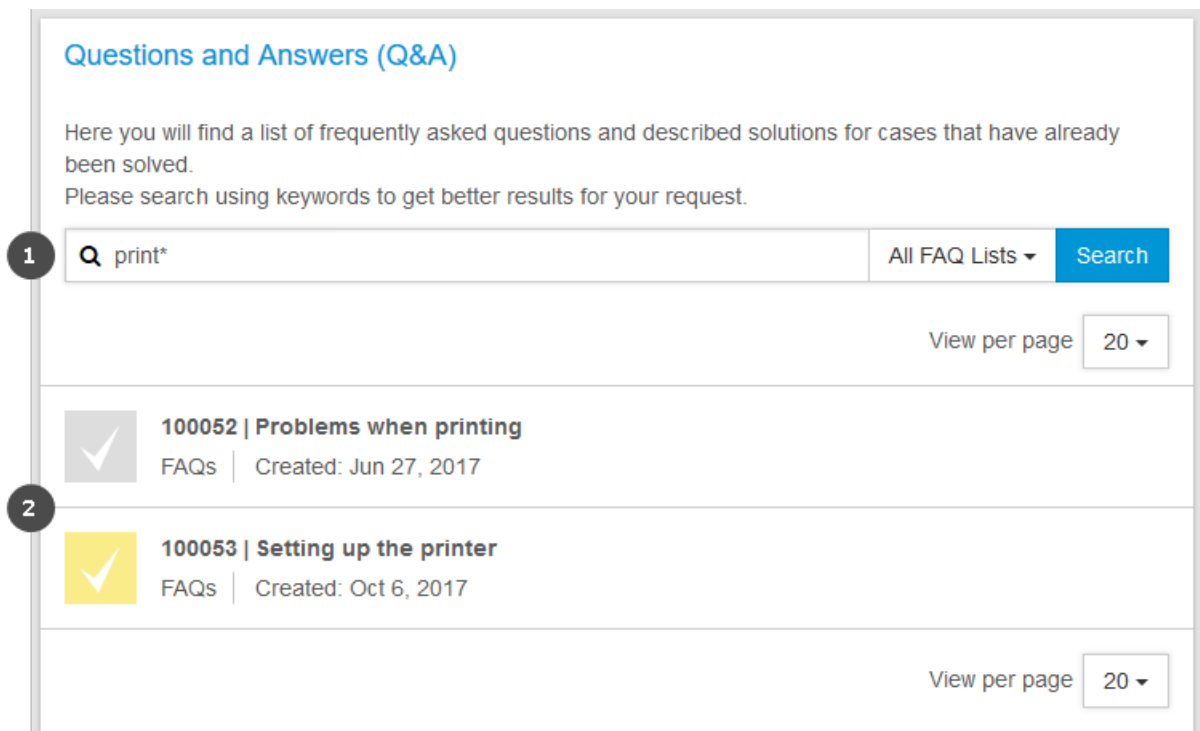



Figure 143: Searching the FAQ

 It is possible to use an asterisk (\*) as a wildcard in the search pattern.

### E.2.6.6 Changing the password

Your CM system can be configured to allow your customers to change their CM/Track password within CM/Track. In this case, the menu bar includes a link for password change.

The customers can change their password by clicking the *Change password* link, and entering the old and new passwords into the respective fields. Afterwards, they have to click the *Change password* button to save their changes.

## E.3 CM/Archive

CM/Archive is a ConSol CM add-on which allows you to view archived cases. These are cases which have been removed from the Web Client but are still needed for reference or regulatory reasons.

The initial screen which is displayed after logging in to CM/Archive is the search screen:

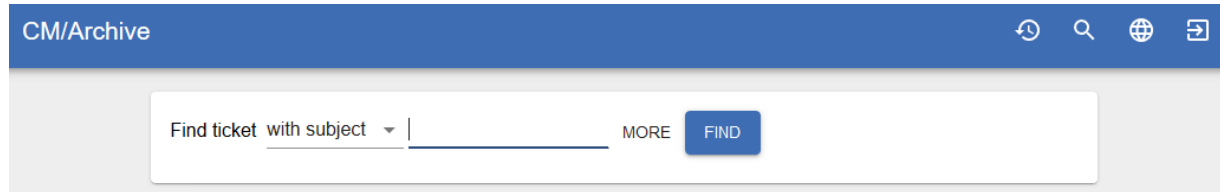


Figure 144: Search for cases in CM/Archive

You can search for a case by name, subject, main contact, and creation, closing or archiving date. Wild-cards can be used for the main contact and the subject. It is possible to combine two search criteria: You can search by name, subject or main contact, and provide a date range (creation or closing date of the case) in addition.

The user interface of CM/Archive enables the following actions:

- View statistics (1) - special permissions are required
- Search for a case (2)
- Change the GUI language (3) - the available languages are English, German and Polish
- Log out (4)



Figure 145: Icons for actions in CM/Archive

The following actions are only possible on the case details page:

- Delete the case (5) - special permissions are required
- Create a PDF with the case content (6)



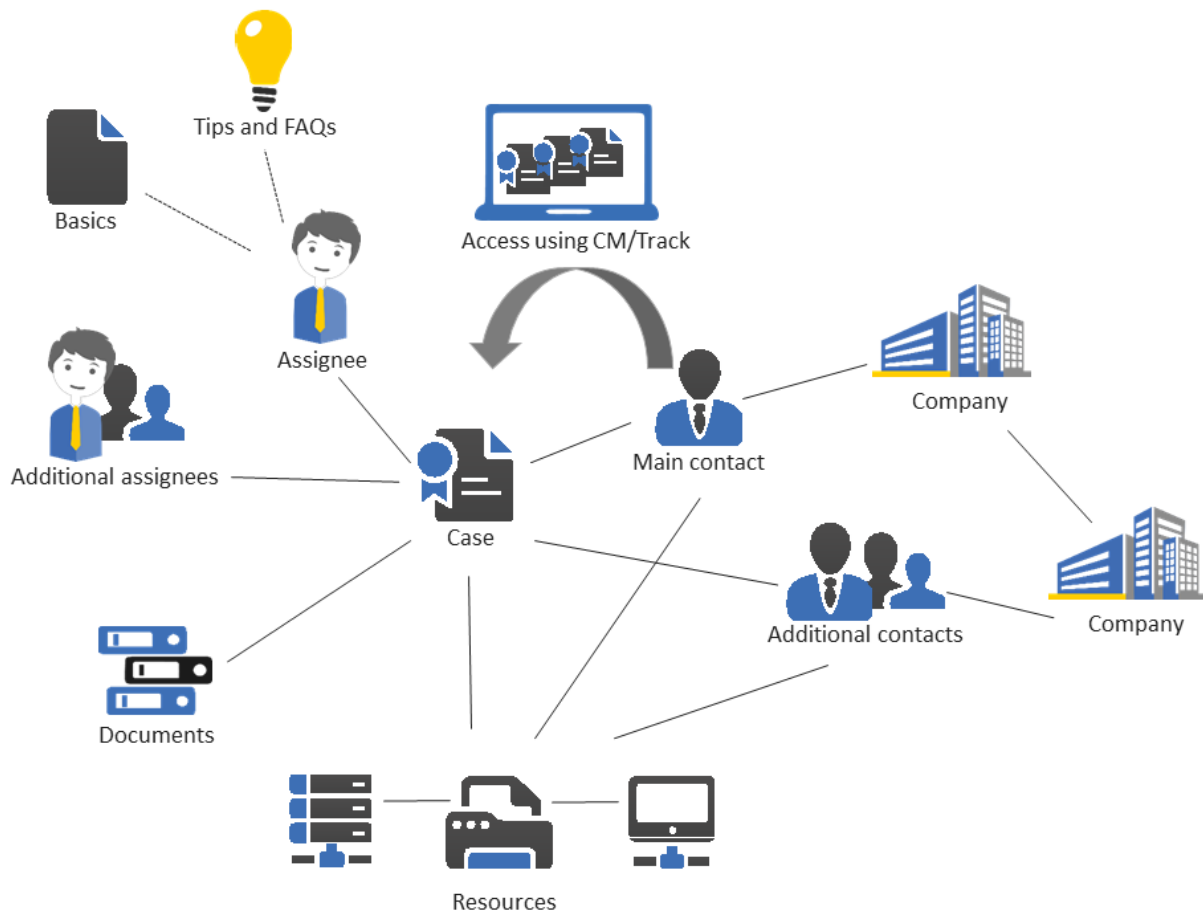
Figure 146: Icons for actions in CM/Archive (case details page)

The archived case consists of several sections which contain the following information:

- **Header**  
Case number, subject, process, scope, workflow, assignee

- **Case fields**  
Case fields (only fields containing values). The fields from the *Details* section of the case are displayed in tabs.
- **Contacts**  
Case contacts (main and additional contacts). You can click the contact to open a pop-up window with the contact data fields. The fields from the *Details* section are displayed in tabs.
- **Referenced cases**  
Related cases. If the referenced case was also archived, you can click the case relation to open it.
- **Referenced resources**  
Related resources
- **Attachments**  
Attachments of the case. You can click an attachment to open it.
- **History**  
Case history, including comments and emails

## F - Tips, troubleshooting, and FAQs



This section provides additional hints which make working with the ConSol CM Web Client easier and quicker.

Tips and tricks for efficient work with ConSol CM:

- [Tips and tricks](#)

Description of common problems and their solutions:

- [Troubleshooting](#)

Frequently asked questions and their answers:

- [FAQs](#)

## F.1 Tips and tricks

This chapter discusses the following:

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F.1.6 Opening the main contact of a case .....	262

### F.1.1 Viewing tooltips

There are many locations where you can get additional information, so called *tooltips*, when you hover over an element in the Web Client. The tooltip usually provides a description of the element. Tooltips are used for example in:

- **Case icon**  
Name of the scope and description of the overlays
- **Activities**  
Description of the activity
- **Links and buttons**  
Description of the action which can be performed by clicking the link or button

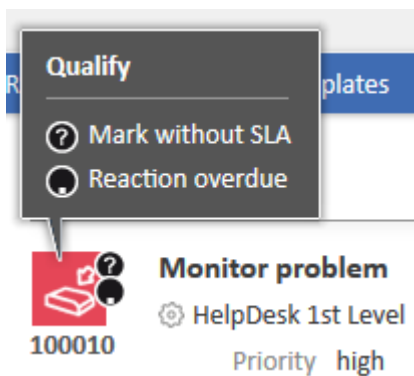


Figure 147: *Tooltip for a case icon*

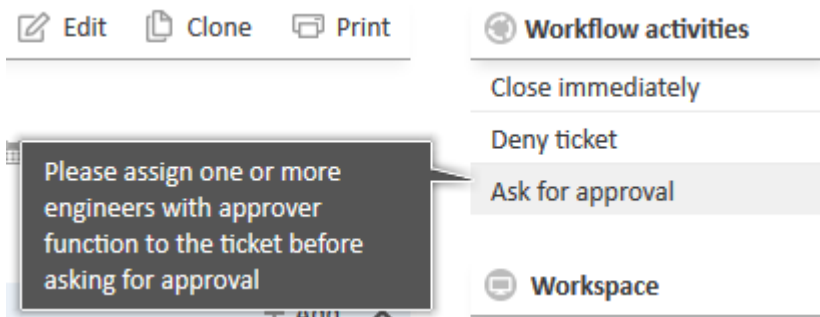


Figure 148: *Tooltip for a workflow activity*

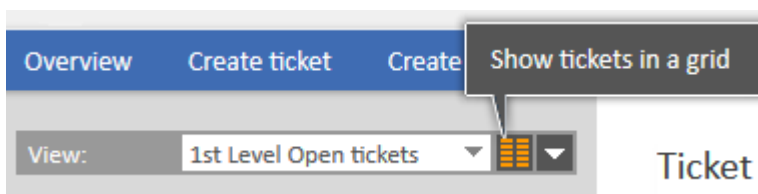


Figure 149: *Tooltip for a button*




## F.1.2 Using keyboard shortcuts

ConSol CM provides keyboard shortcuts for the following actions:

- [execute activities](#)
- [jump to the Quick Search](#)

In addition, you might want to use the keyboard shortcuts provided by your browser. For example, you can use the TAB key to navigate the page and the ENTER key to press a button.

 The availability of the CM-specific keyboard shortcuts depends on your system configuration.

### F.1.2.1 Keyboard shortcuts for executing activities

These shortcuts apply to workflow activities, contact activities, resource activities and search activities. There are up to nine shortcuts available: Alt+1 for the first activity in the list, Alt+2 for the second activity, and so on.



Figure 150: Keyboard shortcuts for workflow activities

### F.1.2.2 Keyboard shortcut for jumping to the Quick Search

You can press the “F” key to jump to the Quick Search. This allows you to enter your search term without having to click in the Quick Search field.

## F.1.3 Using the favorites

The favorites are a box displayed to the right of the main working area. They serve as a quick access to certain items in ConSol CM. The items you add to the favorites are saved in the favorites independently of your session: you can still access them after logging out and logging in again.

The screenshot displays the 'Ticket' interface. At the top, there are buttons for 'Edit', 'Clone', and 'Print'. The main area shows ticket details for 'Problem with new printer' (ID 100000), including 'ServiceDesk', 'Work in progress', 'Susan ServiceDesk', and a date '1/31/17 8:24 AM'. Below this, there are sections for 'DETAILS', 'CUSTOMERS (1)', 'RELATIONS (1)', 'CALENDAR', and 'RELATED RESOURCES (2)'. On the right, a sidebar contains 'Workflow activities' (Ticket in progress, Put ticket on hold, Create special task), 'Workspace' (Workspace is empty), and 'Favorites' (Spaceship Ltd, Layout issues when printing, HP Printer 924). A callout bubble points to the 'Favorites' section with the text 'The favorites'.

Figure 151: Favorites

The favorites provide quick access to:

- Cases
- Contacts
- Resources
- Detailed Searches

You can save up to 10 items in the Favorites.

### F.1.3.1 Adding items to the favorites

You can add a case, contact, resource, or Detailed Search to the favorites using the drag-and-drop features. Please proceed as follows to add the item to the favorites:

1. Click the icon of the respective item. This can be the [case icon](#), [contact icon](#), [resource icon](#), or [search icon](#).
2. Drag the icon to the favorites box and drop it there. In case of a Detailed Search, you have to enter a name for the search before you can save it to the favorites. Cases, contacts, and resources are automatically displayed with their names according to the individual configuration of your CM system.

The following figure illustrates how to add a person to the favorites:

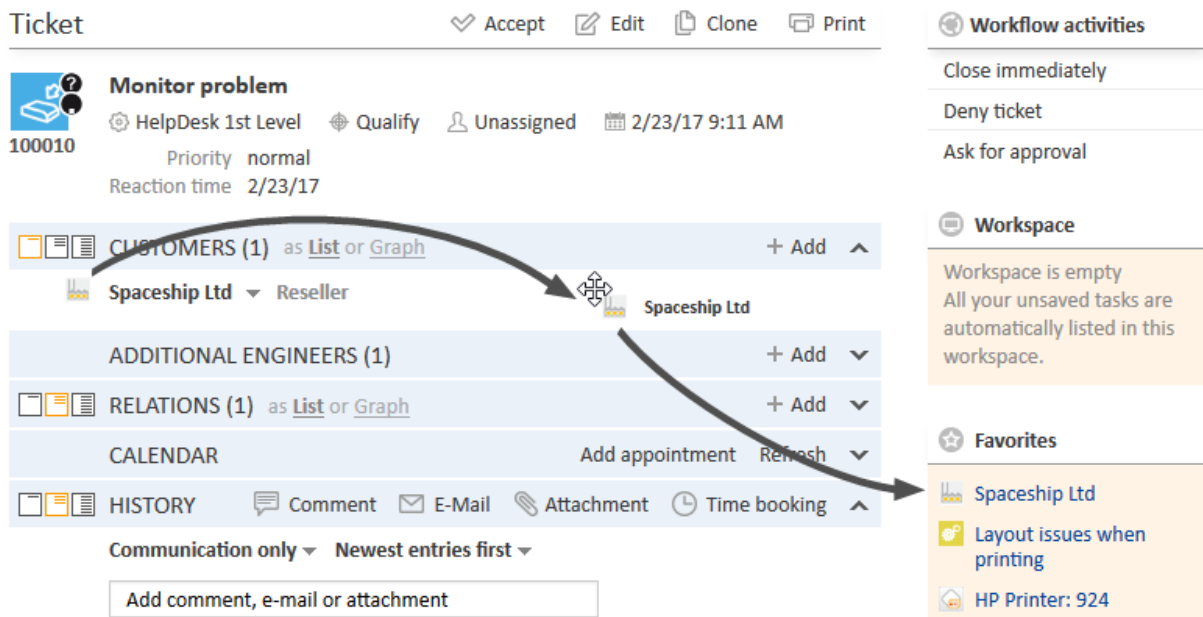


Figure 152: Adding a person to the favorites

Depending on the type of item, you can drag-and-drop it from several locations. For example, you can drag the case icon from the case list, the case header, a case relation, or a result table containing the case name and icon.

### F.1.3.2 Working with the favorites

You can carry out different actions with the favorites:

- [Opening an item from the favorites](#)
- [Rearranging the items in the favorites](#)
- [Removing an item from the favorites](#)

#### Opening an item from the favorites

You can use the favorites to open the items saved there. This can be a case, contact page, resource page, or Detailed Search. To do so, just click the name of the item, which is a link.

#### Rearranging the items in the favorites

You can change the order of the items in the favorites by dragging-and-dropping each item to the desired position.

#### Removing an item from the favorites

You can delete an item from the favorites by clicking the red cross next to the item's name. The red cross is displayed as soon as you hover the mouse over the item.

## F.1.4 Using the workspace

The workspace is a box displayed to the right of the main working area. It serves as a temporary storage for changed cases, contacts, and resources, in case you switch to another object without having saved the changes to the previous object before. The content of the workspace is deleted when your session ends, i.e., you log out of the Web Client or you are logged out automatically.

The screenshot displays the 'Ticket' interface. At the top, there are buttons for 'Edit', 'Clone', and 'Print'. Below this, the ticket details for 'Problem with new printer' are shown, including 'ServiceDesk', 'Work in progress', 'Susan ServiceDesk', and a date/time stamp. A callout box labeled 'The workspace' points to the right sidebar. The sidebar contains sections: 'Workflow activities' (with options like 'Ticket in progress', 'Put ticket on hold', and 'Create special task'), 'Workspace' (with 'Monitor problem' and 'Spaceship Ltd'), and 'Favorites' (with 'Layout issues when printing', 'Spaceship Ltd', and 'HP Printer: 924'). The main area shows 'DETAILS' for 'CUSTOMERS (1)' with a list view of 'Luke Skywalker' and sections for 'RELATIONS (1)', 'CALENDAR', and 'RELATED RESOURCES (2)'.

Figure 153: *Workspace*

The workspace saves your changes both for new objects, i.e., when you create a new case, contact, or resource, and for existing objects, i.e., when you edit a case, contact, or resource. If you switch to another screen while editing data, your changes will not be lost, but you can resume work later on.

### F.1.4.1 Working with the workspace

You can carry out different actions with the workspace:

- [Resuming work on an item in the workspace](#)
- [Removing an item from the workspace](#)

#### Resuming work on an item in the workspace

You can resume work on an item from the workspace by clicking its name. It will be opened in edit mode in the main working area and your unsaved changes will be present.

#### Removing an item from the workspace

You can delete an item from the workspace by clicking the red cross next to the item's name. The red cross is displayed as soon as you hover the mouse over the item.

**i** When you log out of the Web Client or a session timeout occurs, the workspace will be emptied automatically. You will be prompted for the decision to postpone the logout (to finish work on the objects in the workspace) or to continue the logout process and discard all changes to the objects in the workspace.

### F.1.5 Adding case relations via drag-and-drop

You can add case relations to a case by dragging-and-dropping the case icon into the [section for related cases](#) of the case. You can use a case icon from the case list (see figure below), from the workspace, or from the favorites for this purpose. Once you have dropped the case icon, the section for related cases is opened in edit mode. The target case is already selected and you can directly select the type of relation. Please see [Adding a case relation](#) for further information.

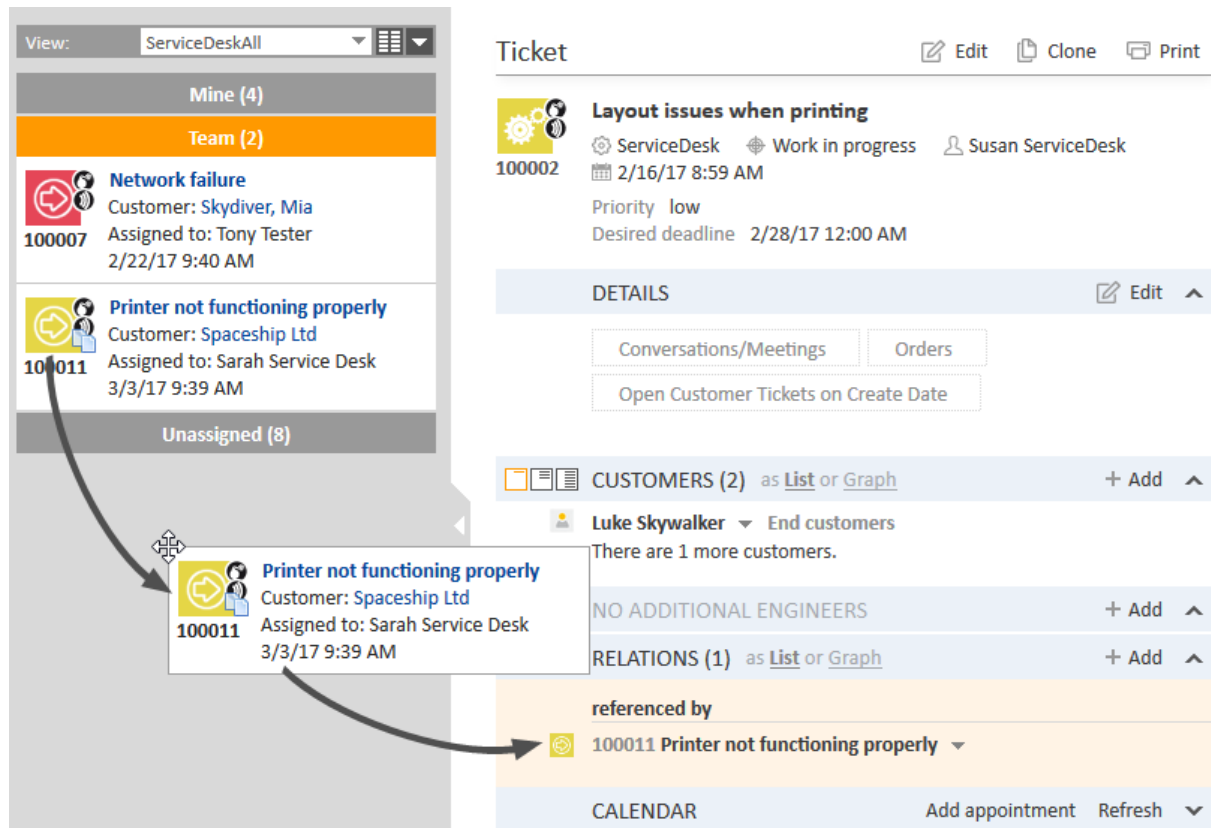


Figure 154: Adding a case relation using drag-and-drop

## F.1.6 Opening the main contact of a case

There are two ways to quickly open the main contact of a case:

- (1) Click the contact link in the case list.
- (2) Click the *Jump to person / company* link in the [contacts section](#) of the case.

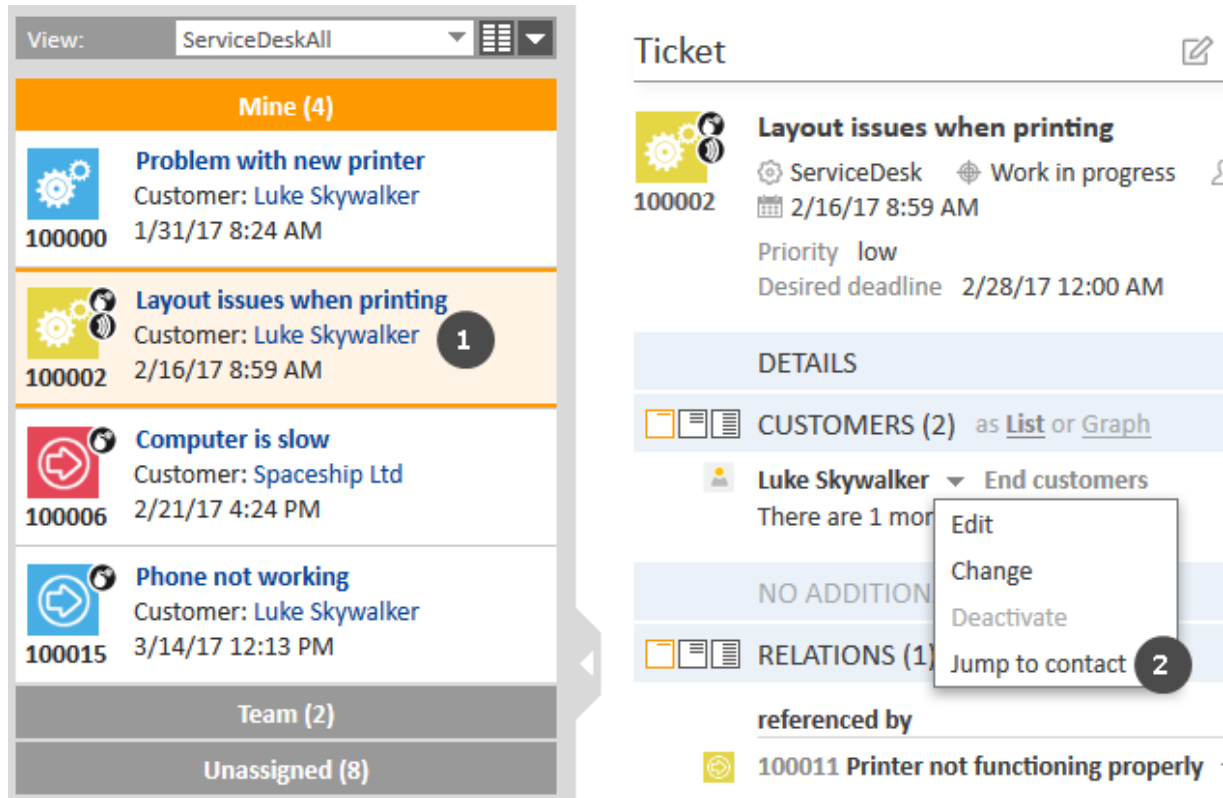


Figure 155: Opening the main contact of a case

If the contact is a person within a two-level contact model, you can also jump directly to the company which the person belongs to. To do so, please proceed as follows:

1. Select the [visibility level](#) *Detail*.
2. Click the *Jump to company* link in the context menu of the company.

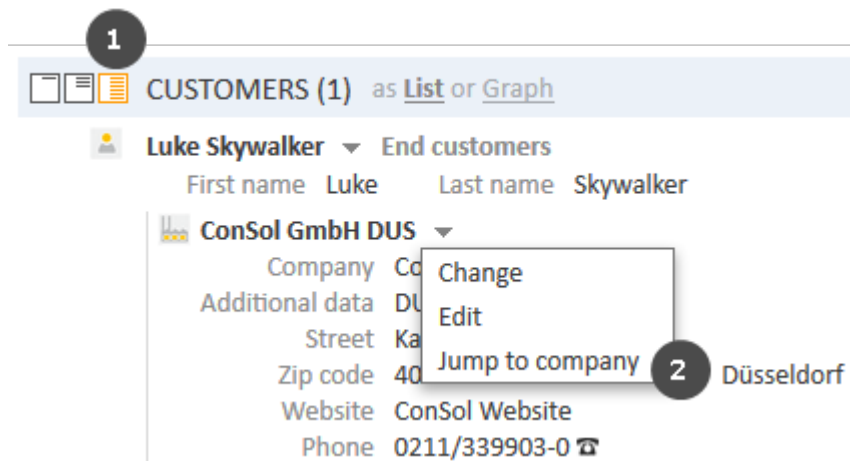


Figure 156: Opening the company



If you want to open the page of an additional contact, you can use the *Jump to person / company* links in the context menu of the additional contact.

## F.2 Troubleshooting

This chapter discusses the following:

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## F.2.1 User name and password

### F.2.1.1 You forgot your password

If you forgot your password, you have to reset it, i.e., you have to choose a new password.

You can reset your password using the login page of the Web Client. To do so, please proceed as follows:

1. Open the login page of the Web Client.
2. Click the *Forgot your password?* link (see figure below).
3. Enter your user name in the field provided on the next screen and click *OK*.
4. You will receive an email with instructions on how to reset your password. Usually the email contains a link which leads you to a Web Client screen where you can enter a new password. Follow the instructions in the email.

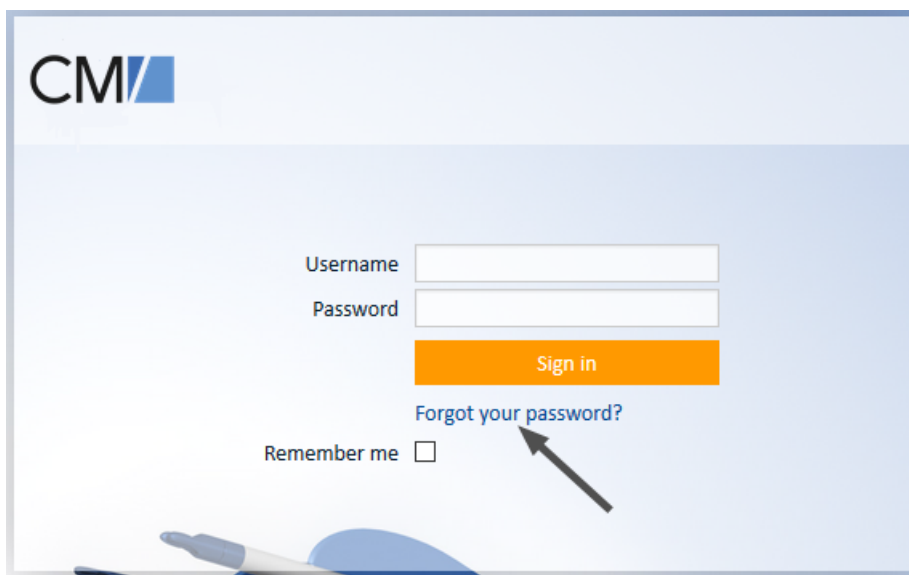



Figure 157: Resetting your password

 If you log in via [LDAP](#) or [Single Sign-On](#), you cannot reset your password via the login page of the Web Client. Please contact your CM administrator in this case.

### F.2.1.2 You forgot your user name

If you forgot your user name, please contact your CM administrator. The user name of your user account is determined by your CM administrator; you cannot change it yourself.

### F.2.1.3 You want to change the user name when logged in automatically

There can be two reasons why you are being logged in automatically:

- You activated the check box *Remember me* on the Web Client login page.
- You are logged in via [Single Sign-On](#). In this case, the user account you are logged in with depends on the user account you are currently using on your Windows computer.

In both cases you have two options for logging in with another user name:

- Wait until you are logged in automatically and click the *Logout* button. You will be directed to the login page of the Web Client and can log in with another user name.
- Enter the URL for the Web Client login page directly into your browser. This URL usually ends with *....cm-client/login*

## F.2.2 Cases

### F.2.2.1 You cannot find a case using the search

There can be several reasons why you cannot find a case using the Quick Search or Detailed Search:

- The case subject was changed, so you cannot find it when searching for its old subject.  
→ Try searching for the case number instead.
- The Quick Search returns too many results, so your case is not included in the result list. This may happen because the number of results in the Quick Search is limited.  
→ Narrow down the search by entering more characters or use the Detailed Search.
- You do not have the necessary permissions to view the case. This may happen when a case was moved to another process for which you lack read permissions or if the main contact was changed to a contact from a customer group for which you lack read permissions.  
→ Contact your CM administrator who can grant you the required permissions (if this is allowed).
- You applied a [customer group filter](#) in the main menu to display only the selected customer group. If the case's main contact belongs to another customer group, you do not find it using the search functions.  
→ Select *All customer groups* in the customer group filter.
- The case has been deleted from the CM system.

### F.2.2.2 You do not see a case in the case list

1. Search for the case using the Quick Search or Detailed Search to check if you can see the case at all. If you cannot find the case, see [You cannot find a case using the search](#).
2. If you can find the case via the search functions, check if you chose an appropriate view in the case list, i.e., a view that should contain the desired case.
3. Check if you activated a [filter](#) for the case list, which prevents the display of this particular case.
4. Check if you opened the correct [group](#) within the case list. The case might belong to a group other than the currently opened one.
5. Check your [user profile](#) if you set [view criteria](#) that prevent the display of the case.

### F.2.2.3 You cannot see a particular case section

Your CM administrator defines which case sections you are able to see and in which order they are displayed. You can [expand and collapse](#) case sections, but you cannot see a case section that has been disabled by your administrator.

### F.2.2.4 You cannot work on a case

There can be two reasons why you cannot work on a case:

- You do not have the necessary permissions to work on the case. As permissions are granted for different actions separately, it may happen that you can perform some but not all actions, e.g., you may be able to add a comment but not to assign the case to another user.  
→ Contact your CM administrator who can grant you the required permissions (if this is allowed).
- The case is closed or archived. Therefore, no workflow activities are displayed, you cannot edit the case data and you cannot write comments or emails. Please see [Case states](#).

## F.2.3 Contacts

### F.2.3.1 You cannot find a contact using the search

There can be several reasons why you cannot find a contact using the Quick Search or the Detailed Search:

- The Quick Search returns too many results, so your contact is not included in the result list. This may happen because the number of results in the Quick Search is limited.  
→ Narrow down the search by entering more characters or use the Detailed Search.
- You do not have the necessary permissions to view the contact. This may happen if the contact belongs to a customer group for which you lack read permissions.  
→ Contact your CM administrator who can grant you the required permissions (if this is allowed).
- You applied a [customer group filter](#) in the main menu to display only the selected customer group. If the contact belongs to another customer group, you do not find him using the search functions.  
→ Select *All customer groups* in the customer group filter.
- The contact has been deactivated.  
→ Use the Detailed Search with the option *Deactivated incl.*
- The contact has been deleted from the CM system.

### F.2.3.2 You cannot see the tabs for the different customer groups

When creating a case, editing a case or creating a contact, the different customer groups are displayed in tabs. There can be several reasons for the tabs not being displayed:

- You applied a [customer group filter](#) in the main menu to display only the selected customer group. In this case, the tabs of the other customer groups are not displayed.  
→ Set the filter to *All customer groups* to display the tabs for all customer groups which you have access to.
- You do not have the necessary permissions to create or view contacts of other customer groups.  
→ Contact your CM administrator who can grant you the required permissions.
- The case's process does not allow contacts from other customer groups.

### F.2.3.3 You cannot see a particular contact page section

Your CM administrator defines which contact page sections you are able to see and in which order they are displayed. You can [expand and collapse](#) contact page sections, but you cannot see a section that has been disabled by your administrator.

## F.2.4 Resources

### F.2.4.1 You cannot find a resource using the search

There can be several reasons why you cannot find a resource using the Quick Search or the Detailed Search:

- The Quick Search returns too many results, so your resource is not included in the result list. This may happen because the number of results in the Quick Search is limited.  
→ Narrow down the search by entering more characters or use the Detailed Search.
- You do not have the necessary permissions to view the resource. This may happen when the resource belongs to a resource type for which you lack read permissions.  
→ Contact your CM administrator who can grant you the required permissions.
- The resource has been deactivated.  
→ Use the Detailed Search with the option *Deactivated incl.*
- The resource has been deleted from the CM system.

### F.2.4.2 You cannot see a particular resource page section

Your CM administrator defines which resource page sections you are able to see and in which order they are displayed. You can [expand and collapse](#) resource page sections, but you cannot see a section that has been disabled by your administrator.

## F.2.5 Views

### F.2.5.1 The grouping by assignee is not shown in the case list

The grouping option *Assignee* is not shown in the drop-down menu *Group by* if you selected a filter since all groups but *Own cases* would be empty. Select the option *All cases* from the drop-down menu *Filter* to display this grouping option again.

## F.2.6 CM/Doc

### F.2.6.1 You cannot add attachments using CM/Doc

There can be several reasons why CM/Doc is not available:

- CM/Doc is disabled for your CM system.
- You have disabled CM/Doc in your user profile.  
→ Open the user profile and select *Enabled* in the *Document generation via CM/Doc* section (see [Document generation via CM/Doc](#)).
- CM/Doc is not installed on your computer.  
→ Install CM/Doc (see [Installing CM/Doc](#)).
- Microsoft Word or OpenOffice is not installed on your computer, or not used as a default program for opening doc., docx., or .odt. files.  
→ Ask your CM administrator which office software you need to use CM/Doc and set this office software as default for opening the files.
- The browser blocks CM/Doc.  
→ Confirm that you want to open *Java(TM) Platform SE binary*.


If the problem is not solved, please see the description on using CM/Doc with HTTPS in the next section.

### F.2.6.2 CM/Doc is not opened when using HTTPS

If you use CM/Doc with HTTPS, i.e., the URL of the Web Client starts with <https://>, you need to trust the certificate of CM/Doc. This requires some additional steps when using Firefox or Internet Explorer as a browser.

Please perform the following steps for both Firefox and Internet Explorer:

1. Open the context menu of the CM/Doc application in the system tray.
2. Go to *Preferences -> Web Browser*. A pop-up window with an explanation is opened.
3. CM/Doc opens a page in your default browser and the browser displays a warning message about the certificate. You need to confirm the warning message and trust the certificate.

 If the page is not opened automatically, click the link provided in the pop-up window. If you do not use the Web Client in your default browser, copy the link and open it in the browser you use. The link has the following format: <https://<URL to your CM system>:30333>.

4. The message *CM/Doc successfully enabled for this browser* is displayed in the browser.

For Internet Explorer, please perform the following additional steps:

1. Go to *Internet options -> Content -> Certificates -> Trusted Root Certificate Authorities*.
2. Click *Import*.
3. Import the CM/Doc certificate, i.e., the file [public.crt](#) in [C:\Users\<your user name>\AppData\Local\cmdoc\security](#), to the *Trusted Root Certificate Authorities* certificate store.

## F.3 FAQs

This chapter discusses the following:

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## F.3.1 General

### F.3.1.1 Why can't I change my password in my user profile?

You cannot change your password if you log in using [LDAP](#) or [Single Sign-On](#).

### F.3.1.2 An error message is displayed. What should I do?

If you see a red error message below the main menu, you should either take a screenshot of the message or copy the message text. Then you contact your administrator providing as much details as possible about what you did before the error occurred.

## F.3.2 Assignees

### F.3.2.1 What does it mean to be an additional assignee?

As an additional assignee (also called *referenced assignee*), you usually have to carry out some special tasks for the case. As an additional assignee, you always have a function. For example, you might be in charge of approving a compensation or reviewing a solution. You can also have different functions for a case. Please see [Assignees and additional assignees](#) and [Additional assignees and approval processes](#) for further information.

### F.3.2.2 How can I search for the cases where I am an additional assignee?

You can search for the cases where you are added as an additional assignee using the [Detailed Search](#). Select *Referenced assignees* as a search criterion and select yourself in the list of users.

In addition, you can filter the case list to display only the cases where you are the assignee or an additional assignee. Please see [Views](#) for further information.

### F.3.2.3 Do I get notified when someone adds me as an additional assignee?

It depends on the individual configuration of your CM system if you receive a notification when someone adds you as an additional assignee. Please contact your CM administrator if you have any doubts.

## F.3.3 Cases

### F.3.3.1 What is the difference between open and closed cases?

As soon as a case is created it is an **open** case. After a case went through the whole business process and there are no workflow activities for the case anymore, the case is a **closed** case. Closing a case can be done manually by a user or automatically by the system, e.g., after a defined waiting time after the last step of the business process.

The actions you can carry out for **open cases** are described in [Updating cases](#).

For **closed cases**, the following applies:

- They can still be found via the Quick Search, Detailed Search, and Autocomplete Search.
- They can still be duplicated and printed.
- They can no longer be edited, which means that case data cannot be changed anymore.
- They can no longer be worked with, which means that there are no workflow activities and you cannot add comments or send emails.
- They can only be reopened by performing a reopen activity or by the CM administrator.

### F.3.3.2 The case history has become quite long. How can I reduce it?

There are two settings which allow you to reduce the number of entries in the case history:

- You can change the [display mode](#) from *All entries* to *Communication*. This way, only emails, comments, and attachments are displayed.
- You can change the [visibility level](#) of the case history from *Detail* or *Extended* to *Basic*. This way, less entries are shown and the information in each entry is reduced.

## F.3.4 Contacts

### F.3.4.1 How can I see all the persons who belong to a company?

You can see the persons who belong to a company on the company page, in the [persons section](#). The number of persons is usually indicated in parentheses in the section's headline.

### F.3.4.2 How can I see all the cases of a contact?

You can see the cases of the contact (i.e., a company or a person) on the contact page, in the [cases section](#). There you can choose which cases should be displayed. The number of cases is usually indicated in parentheses in the section's headline. Note that you only see the cases which you are allowed to view according to your permissions. Therefore, a contact might have more cases, which you cannot view.

### F.3.4.3 What purpose does the field *Track User* serve?

This is a data field in the header section of a person page. It is used to assign a CM/Track profile to a person. If your company does not use CM/Track, you can ignore this field. Please see [Configuring CM/Track for customers](#) for further information.

### F.3.4.4 I accidentally deactivated a contact. How can I find and reactivate him?

You can find a deactivated contact using the Detailed Search. Tick the checkbox *Deactivated incl.* to display deactivated contacts. Then you can open the contact page of the desired contact and reactivate him (see [Making contacts available again](#)).

## F.3.5 Resources

### F.3.5.1 I accidentally deactivated a resource. How can I find and reactivate it?

You can find a deactivated resource on the resource type page or using the Detailed Search. In both places, you just need to tick the checkbox *Deactivated incl.* to display deactivated resources. Then you can open the resource page of the desired resource and reactivate it (see [Making deactivated resources available again](#)).

## G - Appendix

This section contains several appendices:

- [Trademarks](#)
- [Glossary](#)

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## G.2 Glossary

### A

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#### ACF

ACF is the abbreviation of Activity Control Form. ACFs can be used in workflow activities to force the engineer to fill out certain fields before proceeding.

#### activity

Activities, also called actions, are operations which can be performed for tickets, customers, resources, and search results.

#### additional customer

Additional customers are customers (companies or contacts) who are interested in the ticket. They are optional and usually have a role indicating the reason why they were added.

#### additional engineer

Additional engineers are engineers who have a specific purpose, which depends on your business process. Usually, they have to carry out certain tasks within the process.

### B

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#### business process

The business process determines how tickets are handled. It models the way your team works.

### C

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#### CM/Doc

A standard module of ConSol CM which enables the engineer via ConSol CM

Web Client to work with Microsoft Word or OpenOffice documents pre-filled with ConSol CM ticket or customer parameters.

#### CM/Resource Pool

CM/Resource Pool is an optional add-on which allows to store different kinds of objects as resources in ConSol CM.

#### CM/Track

CM/Track is the portal of ConSol CM. Customers can access their tickets through CM/Track.

#### company

The company is the upper hierarchical level of a two-level customer model. A company can have several contacts.

#### contact

The contact is the lower hierarchical level of a two-level customer model. A contact can only belong to one company.

#### customer

The customer represents the external side of a ticket. It designates the person or object that gave the reason for creating a ticket. A customer can either be a company or a contact.

#### customer data model

The customer data model is the definition of the customers. It determines the available data fields and possible relations.

**customer group**

The customer group determines which customer data model is used for its customers and which actions are available.

**E**

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**engineer**

Engineers are the users who work on the tickets in the Web Client

**F**

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**favorites**

The favorites are a box displayed to the right of the main working area. The engineers can add tickets, customers, resources, or searches to the favorites to quickly access them afterwards.

**G**

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**GUI**

Graphical User Interface

**H**

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**history**

The history contains all changes which were carried out for the ticket, customer, or resource.

**L**

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**LDAP**

LDAP is the abbreviation of Lightweight Directory Access Protocol. It is a protocol used to manage login information for several applications.

**M**

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**main customer**

The main customer is the customer who gave the reason for creating the ticket. The main customer is mandatory for a ticket.

**main menu**

The main menu is displayed in the upper part of the screen. It contains links to the different Web Client screens.

**main working area**

The main working area displays the item which the engineer currently works on. This can be a ticket, a customer page, a search results page, a dashboard, or a resource page.

**O**

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**overlay**

Overlays are little symbols which are added to the ticket icon after specific events happened.

**P**

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**permission**

Permissions determine which tickets an engineer can see in the Web Client and which actions he is allowed to perform. Permissions are always granted via roles, i.e., they are not assigned to a single user but to a group of users sharing a common role. Usually these users belong to the same team and/or have similar functions in the company.

## Q

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### queue

The queue contains thematically related tickets which should be handled in the same way and follow the same business process (workflow). Permissions and other parameters are also defined based on queues.

## R

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### relation

Relations are connections between different data objects in ConSol CM. This can be a relation between two objects of the same type, e.g., between tickets, customers, and resources, or a relation between objects of different types, e.g., between a ticket and a resource or a customer and a resource.

### representation

Representations are temporary replacements. The representing engineer receives a copy of all emails which are sent from the CM system to the represented engineer's email address. In addition, his ticket list has an option to display the tickets of the represented engineer.

### resource

Resources are objects managed in CM/Resource Pool.

### resource type

The resource type is the definition of the resources. It determines the available data fields and possible relations and actions.

### role

Roles are assigned to engineers. They define the engineers' access permissions and views.

## S

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### scope

The workflow is divided into different scopes which indicate the status of a ticket.

### session

The session is the time period between your Web Client login and logout.

## T

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### template

Templates contain predefined and preformatted text. They can be used for comments, emails, and documents.

### ticket

The ticket is the request of the customer which the engineer works on. It is the object which runs through the business process defined by the workflow.

### ticket icon

The ticket icon is displayed in the upper left corner of a ticket and in the ticket list. It usually has a color, which represents the value of a certain parameter, and a symbol, which represents the current scope. The ticket icon can have overlays.

### ticket list

The ticket list is located to the left of the main working area. It shows you certain tickets at a glance.

**time booking**

Time bookings allow the engineers to register the time they worked on a ticket or project.

**U**

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**user profile**

The user profile contains the personal settings, representations, and time bookings of each user.

**V**

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**view**

Views limit the tickets which are shown in the ticket list in the ConSol CM Web Client to those tickets matching specific criteria (scopes from one or more workflows). Views are assigned to roles.

**visibility level**

The visibility level determines the degree of detail of the information displayed in certain sections of tickets, customers, and resources.

**W**

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**Web Client**

The Web Client is the primary access to the system for the engineers.

**workflow**

The workflow is the implementation of the business process managed in ConSol CM. It contains a series of steps which are carried out by the engineers.

**workflow activity**

Workflow activities are used to move tickets through the business process.

**workspace**

The workspace is a box displayed to the right of the main working area. It serves as a temporary storage for tickets, customers, and resources which have been changed but the changes have not been saved yet.