



ConSol Software GmbH

ConSol CM User Manual

Version 6.14.0.1

1 Getting started

This section introduces ConSol CM to users of the Web Client. It describes the user interface and design principles of the Web Client, see [User interface of ConSol CM](#). The last section includes information about the most important objects, see [Objects in ConSol CM](#).

1.1 Purpose of ConSol CM

ConSol CM is a process management platform which can be used for a variety of business processes. Common scenarios are customer service, helpdesk, sales, or complaint processes. ConSol CM is usually adapted to the way of working in your organization. Therefore, the processes are tailored to your needs and offer different degrees of flexibility, from strictly guided processes to flexible case management. Processes can involve several teams which reflect the structure of your organization.

1.2 Web Client

The Web Client is a web application which you can open in a browser. It is the primary access point to the system for the internal users of your organization, who use the Web Client to handle requests according to the defined business process. The Web Client provides access to all the runtime data stored in the ConSol CM system, most importantly cases, contacts and resources.

1.3 User interface of ConSol CM

This section describes the user interface of the ConSol CM Web Client.

1.3.1 Basics

1.3.1.1 Elements of the page

The user interface of the Web Client is structured in four areas:

- **Top bar:** Contains the buttons of the menu bar and global features such as the [customer group filter](#), the [quick search](#), the [detail search](#), the [notifications](#) and the [user profile](#).
- **Left panel:** Contains the [case list](#). This panel can be collapsed.
- **Main panel:** Contains the object which the user works on. This can be a [case](#), a [contact](#), or a [resource](#). Alternatively, the [detail search](#), [user profile](#) or [dashboard](#) is shown in the main panel.
- **Right panel:** Contains the activities which are available for the case, contact, resource or [detail search](#) displayed in the main panel. Below the activities, the [workspace](#) and the [favorites](#) are shown. This panel can be collapsed.

The screenshot displays the ConSol CM Web Client interface. At the top, there is a navigation bar with options like 'Create ticket', 'New contact', and 'Resource pool'. A search bar and user profile icon are also present. The main content area is divided into three vertical sections:

- Left panel:** A list of tickets, including 'Admin-Tool: Broken layout', 'Problem with big attachments', 'AT: NPE when copying roles', 'Incoming mail creates tickets with missing JCR ...', and 'Exception during import data'. A callout box points to this panel with the text 'Left panel with case list'.
- Main panel:** Displays the details of a selected ticket titled 'New laptop'. It shows fields for priority (normal), reaction time, and country (Germany). Below this, there are sections for 'CONTACTS (1)', 'NO ADDITIONAL ENGINEERS', 'NO RELATIONS', 'NO RELATED RESOURCES', and 'HISTORY'. A callout box points to this panel with the text 'Main panel with current case'.
- Right panel:** Contains 'Workflow activities' (Close immediately, Deny ticket, Ask for approval, Update case data), 'Workspace' (Workspace is empty), and 'Favorites' (Outgoing Mail, Problem with big attachments). A callout box points to this panel with the text 'Right panel with activities, workspace and favorites'.

A callout box at the top points to the navigation bar with the text 'Top bar with menu items and global features'.

1.3.1.2 Design principle

Object sections

Cases, contacts and resources are displayed in the main panel. They consist of a header and several sections. The header contains the buttons which refer to actions which apply to the whole objects. Below, the basic data of the object is shown. Every object has an icon which provides some information about it:

- **Case:** The symbol indicates the scope, i.e. the location within the workflow. The color indicates the value of a case field. The icon can have overlays which are added when a specific event has occurred.
- **Contact:** Indicates the [data model](#).
- **Resource:** Indicates the [resource type](#).

Each section has a specific purpose. The section header contains the buttons which apply to the content of the section. The following sections can be present:

Section	Purpose	Available for
Details	Contains additional data fields in one or several tabs or pills.	All objects
Contacts	Contains the main contact and the additional contacts of a case.	Cases
Additional assignees	Contains the additional assignees of a case.	Cases
Cases	Contains the cases of the contact. The case table can be filtered.	Contacts
Persons	Contains the persons which belong to a company.	Companies
Related cases	Contains the cases connected to the current object.	Cases and resources
Related resources	Contains the resources related to the current object.	All objects
Related contacts	Contains the contacts related to the current object.	Contacts and resources
History	Contains the history of all changes made to the object and all actions taken. For cases, the buttons in the header of the history section allow to send emails , write comments , add time bookings and attach documents . In addition, the history display can be modified (see Case history settings).	All objects
Attachments	Contains the attachments of the case. The user can download an attachment from this section. Additional actions are available in the history entry where the attachment was added.	Cases

Section	Purpose	Available for
Comments and attachments	Contains comments and attachments related to the object.	Contacts and resources
Calendar	Contains an integrated Microsoft Outlook calendar	All objects

The following example shows a case. The header of empty sections is shown in gray. You can add content to the sections by using the section buttons on the right of the section header.

The screenshot shows a case titled "New laptop" with ID 100296. The page is annotated with several callouts:

- Header with object actions:** Points to the top navigation bar containing "Assign to me", "Edit", "Save as favorite", "Clone", and "Print".
- Case icon:** Points to the case icon and title "New laptop".
- Basic data:** Points to the "HelpDesk 1st Level", "Qualify", "Unassigned", and "9/20/21, 9:29 AM" information.
- Contact section with link to main contact:** Points to the "CONTACTS (1)" section header.
- Actions for the contact section:** Points to the "Action" dropdown menu next to the contact name "Katharina Sager-Well".
- Actions for the contact:** Points to the "NO ADDITIONAL ENGINEERS", "NO RELATIONS", and "NO RELATED RESOURCES" sections, which each have a "+ Add" button.
- History section with comments, emails and performed actions:** Points to the "HISTORY" section, which includes a filter for "Communication only" and a "Sort by: Newest entries first" dropdown.
- Communication features:** Points to the "Add comment, e-mail or attachment" input field.

The history entry shows a comment from "webadmin" at "1 minute ago" with the text "Please purchase a new laptop for me."

The sections provide easy access to the objects which are related to the current object. Usually, they contain links to open them in the same or another tab. You can expand and collapse the sections, see [Object sections](#). Section which contain tables allow adjusting the tables, see [Tables](#).

Drag-and-drop

Drag-and-drop is possible for several actions:

- Add objects to the [workspace](#) and the [favorites](#)
- Add a [case relation](#)
- Update a case in a [grid](#)

To use drag-and-drop, you need to drag the object icon to the desired place.

Contexts menus

Context menus provide actions for referenced objects, e.g. the contact of a case or a related object. They can be accessed by clicking the *Action* text with a small arrow, or the small arrow next to the object.



1.3.2 Advanced

1.3.2.1 Why does my ConSol CM system look differently?

ConSol CM provides many customization features which allow your organization to adapt the system to your requirements and use cases. This means that every system has its own processes with the respective activities, and the objects have the data fields needed to support these processes. Object sections and features which are not required in the processes can be hidden.

In addition, the following general aspects can be customized:

- **Layout**
Colors, fonts and images
- **Menus**
Items of the main menu and the context menus
- **Dashboard**
Content and layout of the dashboard
- **Labels**
Naming of objects in the Web Client

1.4 Objects in ConSol CM

The following objects are important for working with ConSol CM:

- **Case**

The [case](#) is the request of the contact which the user works on. The user carries 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.
- **Contact**

The [contact](#) is the reason for opening a case. Usually, this is a customer who has a request. A case can have one main contact and several additional contacts. Depending on the defined [data model](#), you can have a hierarchy consisting of companies with persons, who belong to a company.
- **Resource**

A [resource](#) is an asset which is used in the business process. It is usually related to a case, a contact or another resource.
- **User**

A user is the person who works with the Web Client to handle the requests which are managed as cases. Every case can be assigned to one user, the assignee, who is currently responsible for the case. If other users have a specific task within the process, they can be added as [additional assignees](#). Every user has one or several roles which define the users' access permissions to work with cases, contacts and resources.
- **Workflow**

The workflow implements the business process. It 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.
- **Process**

The [process](#), also called queue, usually reflects 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. The process links the different objects and determines:

 - if the cases have contacts
 - 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)

2 Your daily work with ConSol CM

This section describes the most important tasks you perform during your daily work with the Web Client. The following sections describe the actions which are relevant for most of the users of ConSol CM and are essential for your daily work with the system.

- [Finding an object](#)
- [Working on cases](#)
- [Communicating about cases](#)
- [Taking advantage of user interface features](#)

You can find brief explanations of additional features and tasks in [Advanced features](#). The [Troubleshooting](#) section includes detailed steps to solve common issues.

2.1 Login and logout

You can log in to the system by opening the login page and entering your user name and password. On some systems, you are logged in automatically with your Windows user.

You can log out by clicking the *Log out* button in the user menu. An automatic log out occurs when your [session](#) times out. In both cases your [workspace](#) is deleted.

If you are logged in automatically and want to log in with another user name, click the *Log out* button in the user menu and enter the desired user name on the login page.

2.2 Finding an object

This section describes how to locate cases, contacts and resources in ConSol CM.

2.2.1 Basics

2.2.1.1 Case list

The case list is located at the left side of the screen. It shows the cases which you and your team work on and serves as a to-do list. The case list is structured in several groups, so you can locate the cases which you need to handle more easily. You can select a view to determine which cases should be included in the case list. The settings for the case list are described in [Case list settings](#).

The screenshot displays the ConSol CM interface. On the left, the 'Case list' is visible, showing a list of tickets grouped by team. The 'Team [22]' group is selected, showing several tickets with details like subject, contact, and assignment. Callouts point to 'View and settings' (filters and sort options), 'Case list groups' (the team header), and 'Case list entries' (individual ticket items). The right panel shows an 'Overview' section with 'Recent Changes' and a bar chart for '1st Level Open tickets'.

Case list settings:

- View: 1st Level Open tickets
- Filter: All tickets
- Group by: Engineer
- Sort by: Creation date

Case list groups:

- Mine (0)
- Team [22]

Case list entries:

- Outgoing Mail: Subject+Body Encoding in UTF-8**
Contact: Sophia Kernhauser
Assigned to: Meier, Friedrich
3/25/08, 12:28 PM
inventory
- TicketSearch - searching by operation date is b...**
Contact: Dieter Mors
Assigned to: Meier, Friedrich
3/25/08, 5:11 PM
misc
- Admin-Tool: Broken layout**
Contact: Dietrich Habermann
Assigned to: Meier, Friedrich
3/31/08, 11:52 AM
inventory
- Problem with big attachments**
Contact: Dieter Mors
Assigned to: Meier, Friedrich
4/2/08, 4:51 PM
AdminTool
- AT: NPE when copying roles**
Contact: Peter Diemann

Overview:

- Recent Changes: 100296 - New laptop (by webadmin, 4 hours ago)
- Mark without SLA has been triggered (4 hours ago)
- SLA exists? has been triggered, new Scope is Qualify (4 hours ago)
- Reaction time set to 9/21/21 9:29 AM (4 hours ago)
- 2 more changes

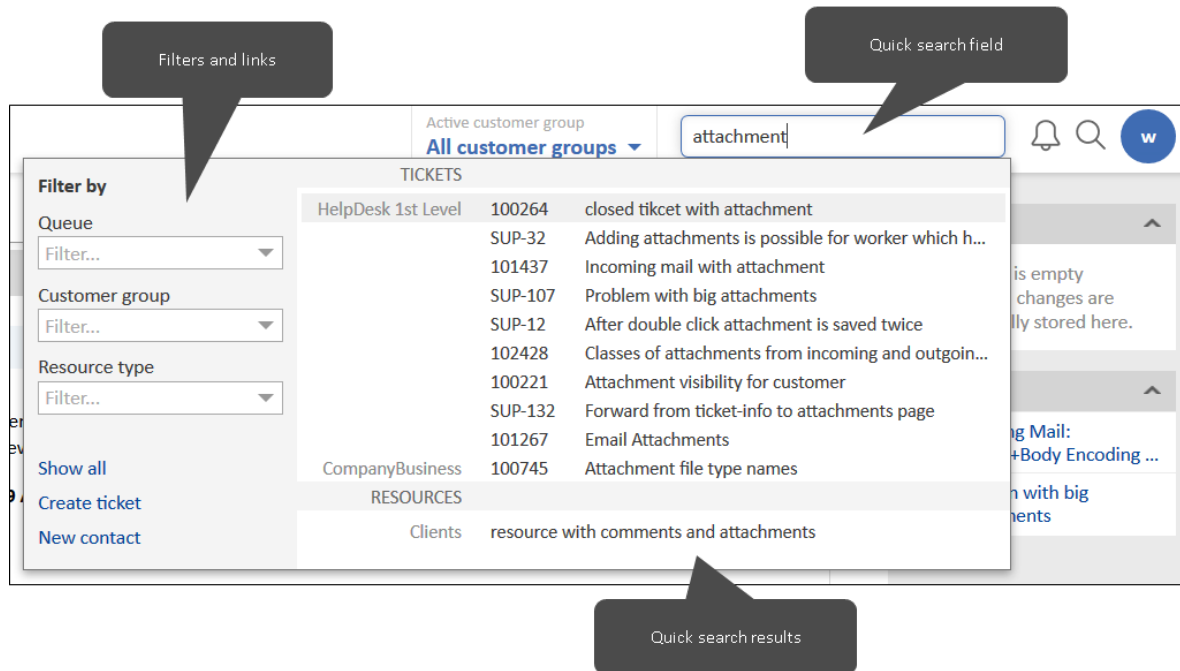
1st Level Open tickets:

Bar chart showing values for 'All' and 'Own' categories. The 'All' category has a value of approximately 140, and the 'Own' category has a value of 0.

In addition to the list form you can also display the cases from the case list as a [grid](#) in the main panel.

2.2.1.2 Quick search

You can use the quick search by typing a keyword in the search field in the menu bar.



The matching cases, contacts and resources are displayed in the results window below the search field. If you enter several keywords, only objects which contain all of them are found. If the phonetic search is enabled in your system, the quick search also returns results which have a similar pronunciation but a different spelling.

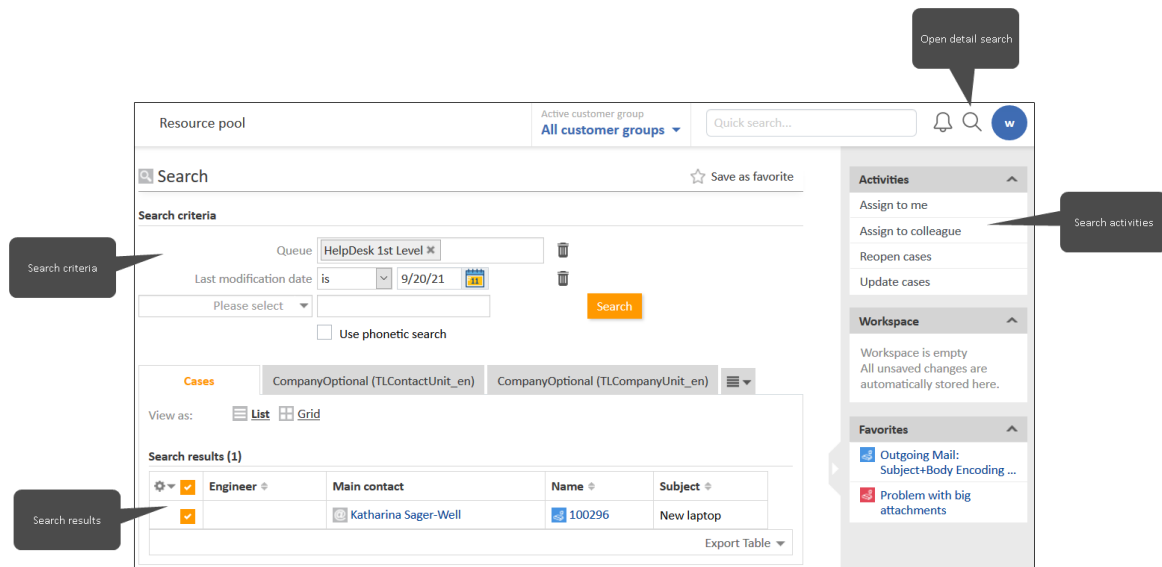
The following object content is considered for the quick search:

- **All objects:** data fields configured to be searchable
- **Cases:** number, subject, name of the contact, name of the assignee or additional assignee
- **Contacts:** company
- **Resources:** resource type

You can filter the search results using the options on the left. The quick search only shows a limited number of results. You can see all the results by clicking the *Show all* link to open the [detail search](#). Alternatively, you can narrow down the search by entering more characters or search terms. If you enter two terms, you see results which contain both of them.

2.2.1.3 Detail search

The detail search is an extended search in the main panel. It allows to combine several search criteria and to perform actions with the search results. You can access the detail search directly by clicking the magnifying glass icon in the menu bar or by clicking the *Show all* link in the [quick search](#). In the latter case, the search words from the quick search are populated to the *Free text (all fields, emails and comments)* field.



The following search criteria are available:

- **All objects:** free text and data fields configured to be searchable
- **Cases:** status (open, closed, archived), creation, last modification and close date, process and scope, assignee and referenced assignee, subject, view
- **Contacts:** company, person, customer group
- **Resources:** resource type

To search for resources, you need to select the *Resources* tab in the results table first.

You can add as many search criteria as you want to narrow down the search. Only objects for which all search criteria apply are shown. The search is performed automatically for cases and contacts, i.e. if you search for cases, the main and additional contacts of the cases are shown as well, and if you search for contacts, you will also see their cases.

You can enable the phonetic search to include results which have a similar pronunciation but a different spelling in the search. For contacts and resources, you can choose to show deactivated objects.

You can perform the following actions with the search results:

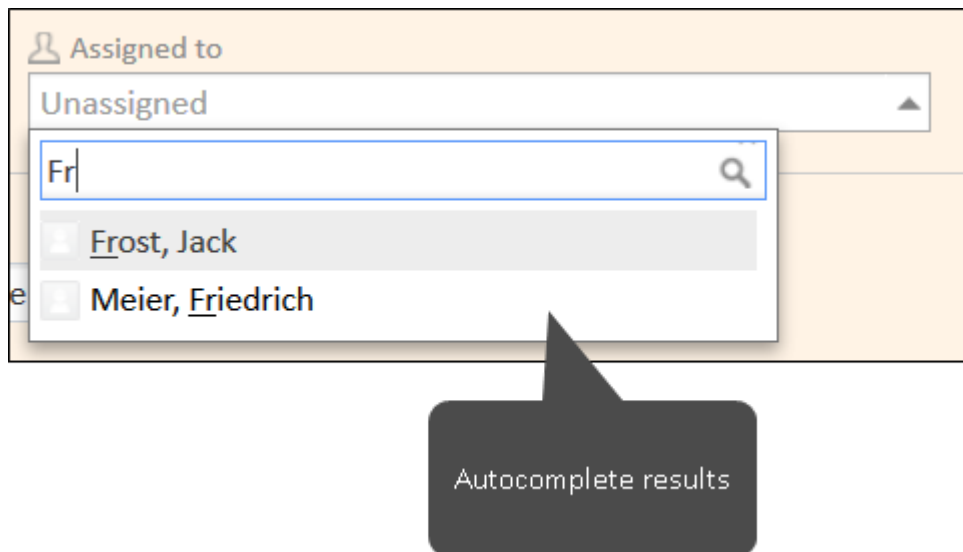
- Adapt the result table, see [Tables](#).
- Save the search to your [favorites](#).
- Open the page of an object by clicking its link.
- Open a preview by clicking a row which is not a link.
- Display the results as a [grid](#).
- Perform an activity for the results in the currently selected tab. The activity is executed for all the selected elements on the current page. If a form is opened, you need to fill out the form first.

2.2.1.4 Autocomplete search

The autocomplete search is used inside other objects to allow searching for an object and selecting one of the search results for a specific purpose depending on the context. As soon as you type in the field, a list of suggestions is displayed. If the desired object is not part of the currently shown suggestions, narrow down the search by typing in more characters. You can use the asterisk to see possible entries.

Examples:

- Selecting a contact for a case
- Selecting the assignee for a case
- Creating a relation



2.2.2 Advanced

2.2.2.1 Permissions

You can see only objects for which you have permissions. Permissions are granted by process for cases, by customer group for contacts and by resource type for resources. To view a case, you need to have permissions to view both the case and its main contact. Objects for which you do not have permissions are neither found in the search nor included in the case list.

Your permissions also determine if you are allowed to modify the objects which you can view and which other actions are available to you.

2.3 Working on cases

This section explains how to work on cases, your main task within the ConSol CM Web Client.

2.3.1 Basics

Working on cases is your main task in ConSol CM. This usually includes the following:

1. Locate an existing case (see [Finding an object](#)) or create a new one (see [Creating a case](#)).
2. Modify the case (see [Modifying a case](#)) and move it through the process (see [Moving a case through the process](#)). This usually includes writing emails to communicate with the customer and the colleagues, tracking the case progress by adding comments (see [Communicating about cases](#)), and attaching documents (see [Adding attachments](#)).
3. Close the case once all work is completed. Closed cases can still be found in the [search](#), but they cannot be modified anymore, unless they are [reopened](#).

It depends on your [permissions](#) which cases you are able to see and which actions you are allowed to perform. All actions performed on a case are recorded in the case history.

The screenshot shows the 'Case' details page for a case titled 'New laptop' (ID: 100296). The page is annotated with several callouts:

- Global actions for the case:** Points to the top navigation bar containing 'Assign to me', 'Edit', 'Save as favorite', 'Clone', and 'Print'.
- Activities to move the case through the process:** Points to the 'Workflow activities' sidebar on the right, which includes options like 'Close immediately', 'Deny ticket', and 'Ask for approval'.
- Header and data fields:** Points to the case header area showing 'New laptop', 'HelpDesk 1st Level', 'Priority normal', 'Reaction time 9/23/21 11:31 AM', and 'Country Germany'.
- Actions for the case contact:** Points to the 'CONTACTS (1)' section, specifically to the contact 'Katharina Sager-Well'.
- Link to contact, click the arrow to see more details in the case:** Points to the '@' icon next to the contact name.
- History:** Points to the 'HISTORY' section, which shows a list of actions and a 'Add comment, e-mail or attachment' input field.
- Communication features:** Points to the 'Add comment, e-mail or attachment' input field.

2.3.1.1 Creating a case

You can start the creation of a case in several places:

- **Main menu:**
Click the *Create case* button to create a new case.
- **Case:**
Click the *Clone* button to copy the case, see [Cloning a case](#).

- **Contact:**
Click the *Create case* button to create a case for the given contact.

Some system allow to create cases using activities.

Fill out the required fields in the three sections:

- **Header and details:**
Select the process by clicking the corresponding tab. Fill out the data fields, which depend on the selected process.
- **Contacts:**
Select the contact for the case or create a new contact. If there is more than one [customer group](#), you can choose the customer group by clicking the corresponding tab.
 - **Select an existing contact:** Enter a keyword, such as the name or email address, in the corresponding data field and select one of the contacts suggested by the [auto-complete search](#). In a two level [data model](#), you can select a company first by entering a keyword in the company selector and choosing one of the suggestions.
 - **Create a new contact:** Fill out the data fields with the contact information. In a two level [data model](#), you can either select a company by entering a keyword in the company selector and choosing one of the suggestions, or create a new company by clicking the *Create* link.

This section is not present if contacts are not required in the selected process.

- **Content:**
Write a comment describing the purpose of the case. Optionally, you can add attachments.

Required fields are marked with a red asterisk.

2.3.1.2 Modifying a case

The following aspects of a case are usually modified during its life cycle:

- **Assignee:** This is the user who is taking care of the case at the moment.
You can change the assignee by clicking the *Edit* button in the case header and selecting a user in the *Assigned to* field using [autocomplete search](#). If the case is not assigned yet, you can assign it to yourself by clicking the *Assign to me* button in the case header or the checkmark in the [case list](#).

In some processes, the assignee is set automatically when executing certain workflow activities.

- **Case data:** This is the information included in the case subject and the data fields.
You can modify case data by clicking the *Edit* button in the case header or details section.

- **Communication:** These are emails written to customers or users, and comments about the case progress. They are saved in the case history.

You can write emails and comments using the buttons *Email* and *Comment* above the case history, see [Communicating about cases](#).

- **Case history:** This is the history of all the changes which have been made to the case. It is located at the bottom of the case.

You cannot modify the history, but you can change its display to locate information more easily, see [Case history settings](#).

The following aspects of a case can be modified during its life cycle:

- **Main contact:** This is the contact for whom the case was opened. There is always one main contact.

You can change the main contact by clicking the *Change main contact* button in the *Contacts* section header.

- **Additional contact:** This is a contact who is interested in the case. There can be several additional contacts.

You can add an additional contact by clicking the *Add* button in the *Contacts* section header. Optionally, you can select a role for the additional contact by clicking the role selector next to the contact name. The role usually reflects why the contact was added to the case.

- **Additional assignee:** This is a user who has a specific role defined in your business process. Additional assignees are used for example in [approval processes](#).

You can add an additional assignee by clicking the *Add* button the *Additional assignees* section header. Type the name of the user in the selector and select a role to indicate its function.

For both the main contact and the additional contact, you can either select an existing contact using the [autocomplete search](#) or create a new one, see [Contacts](#).

It is possible to edit the contact data by clicking the *Edit person / Edit company* option in the action menu next to the contact name. Editing contact data is a global action, so the changes are visible in every case which the contact is added to, and on the contact page.

2.3.1.3 Moving a case through the process

You move the case through the process by executing workflow activities. They are located in the upper part of the right panel. The available activities depend on the position of the case in the process. Activities are either executed right away or open a form above the case. If a form is displayed, you need to fill out the form and click the *Save and continue* button to proceed. If you cancel the form, the workflow activity is not executed.

When you click a workflow activity, it can happen that a validation message with a red background is displayed above the case. The message usually indicates that certain criteria must be fulfilled to execute the activity.

Once work on the case is finished, there is an activity to close the case. Closed cases serve as a knowledge base and future reference of the communication with the customer. They can still be found in the search, but you cannot modify them anymore. Sometimes, closed cases can be reopened by clicking an activity or when an email for the case is received.

2.3.1.4 Adding attachments

You can add an attachment to a case by uploading the file in the *Attachments* tab in the history section. The maximum allowed file size is displayed above the upload field. Click the *Attachment* button in the section header, select the files which you want to upload and click the *Add Attachment* button.

If you try to upload a file with a non-allowed file type, an error message is displayed next to the upload field.

You can download an attachment in the *Attachments* section by clicking the link in the *Name* column. Alternatively, you can download the attachment from the history entry where it was added.

2.3.2 Advanced

ConSol CM provides some additional actions for working with cases.

The following actions are generally available:

- [Cloning a case](#): Create a new case based on an existing case.
- [Printing a case](#): Create a PDF document with the case content.
- [Case-case relations](#): Add a link to another case.
- [Case-resource relations](#): Add a link to a resource.

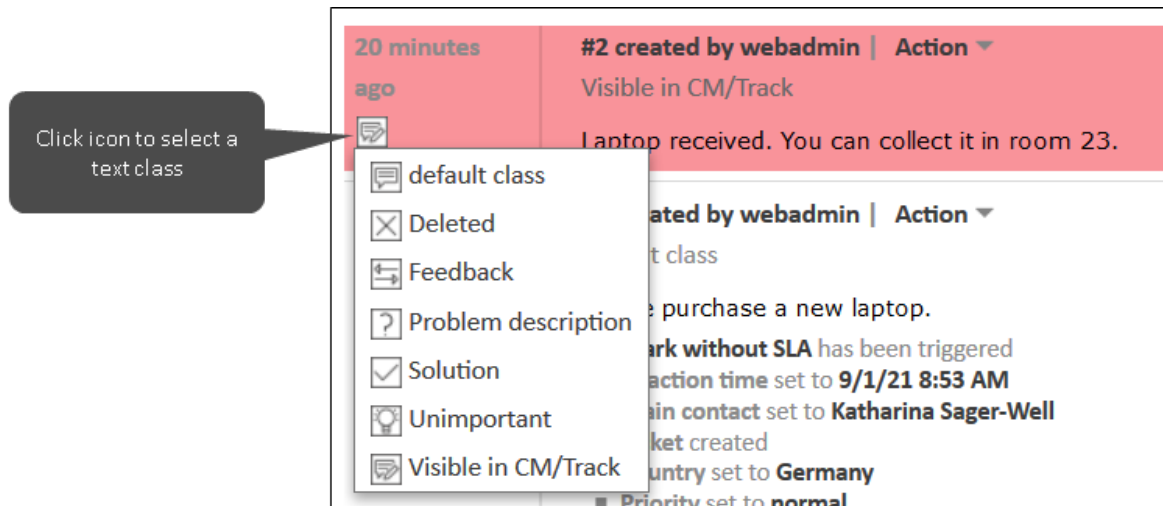
The following actions are available if the related components are used in your system:

- [Sharing information with customers via CM/Track](#): Decide which comments should be shown to a customer using CM/Track.
- [Using document templates with CM/Doc](#): Create and attach Microsoft Word or OpenOffice documents using CM/Doc.

2.3.2.1 Sharing information with customers via CM/Track

You can share information from the case history with customers who use CM/Track. This is done using [text classes](#).

Click the text class icon of a comment, email or attachment entry to set a text class which makes the entry visible in CM/Track.



Depending on the business process, text classes can also be applied automatically by the system. Usually, this is done for the comments and attachments which the customers add using CM/Track, so they are able to see their own entries.

2.3.2.2 Using document templates with CM/Doc

Document templates allow to create Microsoft Word or OpenOffice documents based on a template. The documents usually contain some predefined text and are filled with data from the case (case data, contact data or assignee data).

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

- Microsoft Windows operating system
- CM/Doc application installed, see [Installing CM/Doc](#)
- Microsoft Word / OpenOffice application installed

To use a document template, click the *Document* button in the header of the case history and select the desired template in the *Office template* field. CM/Doc is started and the document is opened in Microsoft Word or OpenOffice. Edit the document and click the *Save* button in the office application. The document is automatically attached to the case.

You can open .docx or .odt documents from the case history by clicking *Edit* in the context menu of the history entry. CM/Doc is started and the document is opened in Microsoft Word or OpenOffice. Edit the document and click the *Save* button in the office application. An updated version of the document is automatically attached to the case.

Saving the document

- Only use the *Save* command. Do not save the document using *Save as...* under a new name or to a new location. If you the change name or location of the document, it cannot be added to the case as an attachment.
- Your ConSol CM system can be configured in a way that a new document is attached to the case with each save operation. Otherwise, the attachment is added in the first save operation and updated with each subsequent save operation as long as the document is not closed.

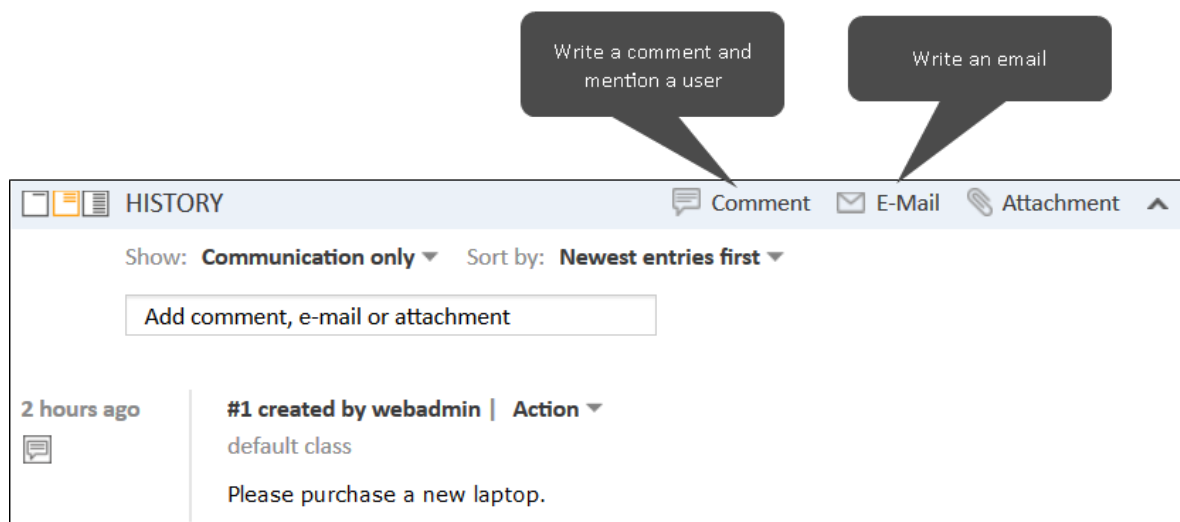
2.4 Communicating about cases

2.4.1 Basics

The Web Client provides the following communication features:

Feature	For colleagues	For customers
Email	Yes	Yes
Comment	Yes	Yes (via CM/Track)
Notification	Yes	No
Mentioning	Yes	No

Emails, comments and mentioning are located at the bottom of the case, above the history section. Notifications are located in the menu bar at the top of the page.



2.4.1.1 Emails

Emails are used to communicate with customers or colleagues. They always concern a specific case. All emails sent from and received by the Web Client are displayed in the history of the case which they concern.

To write an email, click the *Email* button in the header of the history section. Select the recipients and write the email in the rich text editor. You can [use a template](#) to prefill the editor with text drafted for a certain purpose. You can add attachments to the email if the case has any (see [Adding attachments](#)) or quote comments and emails from the case history.

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 sender of the original email is automatically selected as a recipient and the original email is quoted in the rich text editor.
- To forward an email, open the *Action* menu of the desired email and click *Forward*. The original email is quoted in the rich text editor and you have to specify the recipient.

If you send an email which cannot be delivered, a red message is displayed in the respective history entry, and you can click *Retry* in the *Action* menu to make another attempt at sending the email.

2.4.1.2 Comments and mentioning

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 the comments added by contacts via CM/Track.

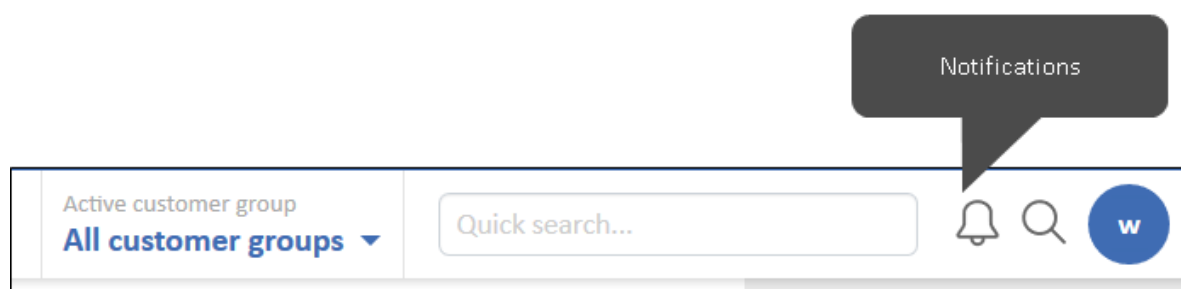
To add a comment, click the *Comment* button in the header of the history section and write your comment using the rich text editor. You can [use a template](#) to prefill the editor with text drafted for a certain purpose.

You can mention other users in your comment by typing the @ symbol and entering the name of the user. The mentioned users receive a [notification](#) with a preview of the comment and a link to the case.

You can edit a comment which you added by clicking *Edit* in the *Action* menu of the comment. Editing is only allowed during a certain time after the comment was added. It is not possible to edit comments of other users. The different versions of the comment are saved and can be viewed in the case history by clicking the *changed ago* link.

2.4.1.3 Notifications

Notifications are short messages sent within the Web Client. You can view your notifications by clicking the bell icon in the menu bar.



You can remove the notifications by clicking the *Clear all* button. Pinned notifications are not removed.

Notifications are used in several ways:

- The system sends a notification to users to inform them about a certain event. This kind of notification can include a link to a case, contact or resource.
- A user sends a notification to another user. You can send a notification by clicking the *New notification* button at the bottom of the notification window. Enter the recipients, select the type of notification and enter the notification text.
- A user mentions another user in a comment. The system sends a notification to inform the mentioned user. This kind of notification includes a preview of the comment and a link to the case to which the comment belongs.

2.4.2 Advanced

2.4.2.1 Using templates for emails and comments

Templates contain predefined text for a specific purpose, e.g. a signature, which can be used in the rich text editor for comments and emails.

To select a template while writing a comment or an email, click the *Add template* button. The available templates are displayed in a list. Hover over the template name to display the preview of the template, including a list of its attachments. 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 template text might include the following features:

- **Variables (blue)**: Case or contact data which is automatically retrieved from the case.
- **Parameters (red)**: Placeholders which you need to fill out above the editor.
- **Text blocks (green)**: You can choose which text blocks to include by selecting the respective checkboxes above the editor.

The colors only serve the purpose of highlighting the features. They are not used in the created comment or email.

2.5 Taking advantage of user interface features

This section describes features of the user interface which can increase your efficiency when working with the ConSol CM Web Client.

2.5.1 Basics

2.5.1.1 Favorites

You can save cases, contacts, resources and detail searches in the *Favorites* box on the right by clicking the *Save as favorite* button in the object header. Alternatively, you can drag the respective icon to the box. For detail searches, you need to enter a name. You can rearrange the items in the favorites using drag-and-drop.

The favorites are saved independently of your session: you can still access them after logging out and logging in again.

2.5.1.2 Workspace

The *Workspace* box on the right serves as a temporary storage for cases, contacts and resources which you have modified without saving the changes. This either happens automatically when you switch to another object without saving the changes of the current object, or manually because you drag an item to the workspace or you click the *Save draft to workspace* button when creating an object. The content of the workspace is deleted when your [session](#) ends.

2.5.2 Advanced

2.5.2.1 Case list settings

You can modify the [case list](#) in the following ways:

- **View:** Choose a view to determine which cases are displayed.
- **Filter:** Limit the displayed cases according to their assignment status, e.g. only display cases assigned to me.
- **Grouping:** Decide which groups are available, e.g. groups for the assignment status or process. On some systems, empty groups are hidden.
- **Sorting:** Determine how the cases are sorted within each group, e.g. by creation or modification date or scope.

The view always determines which processes and scopes the cases belong to. In addition, it can show cases which contain certain values in specific data fields. If a view includes dynamic filter properties, you can select these values in your [user profile](#), in the section *My view filter properties* under *General settings*. Select the desired values by ticking the respective checkboxes for each field. All the cases which contain the selected values are displayed in the view.

If a view has a dynamic filter property and you do not select any value, the view is empty.

2.5.2.2 Case history settings

Below the header of the case history, you can choose which kind of entries you want to see. Choose *Communication only* to display emails, comments and attachments, or *All entries* to display both the communication entries and all the other entries, e.g. changes to the case data or the execution of workflow activities. You can sort the entries either by date (options *Newest entries first* or *Oldest entries first*) or by alphabetically by the user who originated them (option *Assignee*).

The visibility level determines how much details are displayed for each entry. Depending on the system configuration, some history entries might be folded or cut off. You can display the complete entry by unfolding it.

The screenshot shows the 'HISTORY' section of a case management system. At the top, there are three icons (a folder, a document, and a list) followed by the word 'HISTORY'. Below this, there are two dropdown menus: 'Show: All entries' and 'Sort by: Newest entries first'. A text input field contains the placeholder text 'Add comment, e-mail or attachment'. The history entries are listed in a table-like format with alternating red and white background colors. Each entry has a timestamp on the left, an icon, and a main text block on the right. The first entry is '20 minutes ago' with a document icon and the text '#2 created by webadmin | Action' followed by 'Visible in CM/Track' and 'Laptop received. You can collect it in room 23.'. The second entry is '5 hours ago' with a document icon and the text '#1 created by webadmin | Action' followed by 'default class' and a list of actions: 'Please purchase a new laptop.', 'Mark without SLA has been triggered', 'Reaction time set to 9/1/21 8:53 AM', 'Main contact set to Katharina Sager-Well', 'Ticket created', 'Country set to Germany', 'Priority set to normal', and 'Queue set to HelpDesk 1st Level'. Two callout boxes are present: one pointing to the 'Show' dropdown labeled 'Visibility level' and another pointing to the 'Sort by' dropdown labeled 'Filter and sorting'.

2.5.2.3 Object sections

Cases, contacts and resources are structured in several sections. You can expand and collapse these sections using the arrow button in the right part of the section header.

For some sections, the level of detail can be selected in the left part of the section header.

Visibility level

☰ ☰ ☰ RELATIONS (1)

References

🔴 ▾ | SUP-107 | **Problem with big attachments** | **Action** ▾

⚙️ HelpDesk 1st Level
 📍 Qualify
 👤 Meier, Friedrich
 📅 4/2/08, 4:51 PM

2.5.2.4 Tables

Tables are used in several places of the Web Client, for example to display the results of a detail search or the cases of a contact. You can adapt tables in several ways.

- **Configure the table columns:** Click 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. You can rearrange the columns within the table by dragging-and-dropping the column to the desired position.
- **Sort the table:** Click the header of the column which you want to use for sorting.
- **Select the number of entries per page:** If the table 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.
- **Filter the table:** If filters are displayed above the table, you can select a filter option to display only certain table entries, e.g. display only open cases on the contact page.

You can export the table content in CSV format by clicking the *Export Table* option in the lower right corner of the table.

Filter

Sort by column

CASES (8)

Show: **Cases of this person** ▾ Status: **Open cases** ▾

⚙️ Assignee	Main contact	Name	Subject
	👤 Sophia Kernhauser	📄 SUP-98	Administrate permission
	👤 Sophia Kernhauser	📄 SUP-18	AT: Exception during deleting role
	👤 Sophia Kernhauser	📄 SUP-86	Removing tickets with plugins.
	👤 Sophia Kernhauser	📄 SUP-34	Wrong message
	👤 Sophia Kernhauser	📄 SUP-95	Search address in Send Mail
Meier, Friedrich	👤 Sophia Kernhauser	📄 SUP-117	Incoming Mail: Unsupported encoding 'unicode-1-1-utf-7'
Meier, Friedrich	👤 Sophia Kernhauser	📄 SUP-112	Outgoing Mail: Subject+Body Encoding in UTF-8
	👤 Sophia Kernhauser	📄 SUP-26	AT: sortIndex and import,

Export Table ▾

Export

2.5.2.5 Grids

The grid is an alternative way of viewing the cases found in a [detail search](#) or contained in a view of the [case list](#). In the *Group by* field, you can choose the grouping criterion, i.e. the field which determines the columns. Afterwards, you can add or remove specific columns.

You can change the value of the case's grouping criterion by dragging the case from one column to another.

2.5.2.6 User profile

You can open the user profile by clicking the blue circle with your initials. The user profile allows you to make several settings:

- Change your password (only if you have a CM-specific password)
- Define [representations](#)
- Define filter properties for views of the case list, see [Case list settings](#)
- Set a default process which is preselected when you create a new case
- Set a default [customer group](#) which is preselected when you create a contact or add a contact to a case
- Decide if the *Document* tab used for [CM/Doc](#) is displayed

You can perform the following actions in the user profile:

- Add [time bookings](#) and view your time booking report
- Download the CM/Doc or CM/Phone applications
- Remove unneeded personal email addresses
- End unneeded active [sessions](#)

2.5.2.7 Customer group filter

If you have access to contacts from several customer groups but only work with contacts from one of them, you can select this customer group in the filter in the main menu. Only contacts from the selected customer group will be found in the search and you can only use contacts from this customer group in cases.

3 Advanced features

This section contains brief descriptions of the ConSol CM features which are not described in detail in [Getting started](#) and [Your daily work with ConSol CM](#). The features are ordered by area:

- [Generics](#): general use of the application
- [Cases](#): advanced features for cases, basic features are described in [Working on cases](#)
- [Contacts](#): features for contacts
- [Resources](#): features for resources
- [CM/Track](#): features related to CM/Track
- [Processes](#): process examples
- [User interface](#): advanced aspects of the user interface, basic aspects are described in [User interface of ConSol CM](#)

3.1 Generics

3.1.1 Password reset

If you have a CM-specific password, you can reset your password by clicking the *Forgot your password?* link on the login page. You need to enter your user name to receive an email with a link which leads you to a Web Client page where you can enter a new password. If you still remember your old password, you can change the password in the [user profile](#) after logging in to the Web Client.

3.1.2 Session

The session is the time period between [login and logout](#). If you stay inactive for a certain period of time, a session timeout occurs and you are logged out automatically. On some systems, you can avoid being logged out by clicking *Yes, extend my session* in the warning message which is displayed before you are logged out.

You can select the *Remember me* checkbox on the login page if you want to be logged in automatically after an automatic logout occurred. This only works in the same browser which you used to log in and if you neither delete the cookies nor manually log out.

If you log in in two different browsers at once, two sessions are opened and you use two licenses. You can close the other sessions by clicking the button *End my other sessions* in the message displayed after logging in. Alternatively, you can close your other open sessions in the *Active sessions* section of the [user profile](#).

3.2 Cases

The case is the request of the contact which the users works on. The users carry out the necessary steps as defined in the business process. The progress, including internal and external communication, is documented in the case. Basic actions related to cases are described in [Working on cases](#).

3.2.1 Case-case relations

Case-case relations are links between two cases. This can be reference relations or hierarchical dependencies. You can create a relation in the *Relations* section of a case.

1. Click the *Add* button in the section header.
2. Select another case using the [autocomplete search](#).
3. Choose the type of relation:
 - **Reference:** Creates a non-hierarchical relation between the cases.
 - **Child:** Adds the selected case as a sub-case of the current case, i.e. the current case will be the parent. A case can have several child cases.
 - **Parent:** Adds the current case as a sub-case of the selected case, i.e. the current case will be the child. A case can only have one parent case.
4. Click the *Add relation* button.

Relations can also be created automatically. If you see a relation of the type *Parent (fixed)* or *Child (fixed)*, you cannot modify it.

3.2.2 Case-resource relations

Case-resource relations are links between a case and a resource. You can create a relation in the *Related resources* section of a case:

1. Click the *Add* button in the box of the required resource type.
2. Select a resource using the [autocomplete search](#).
3. Click the *Add relation* button.

3.2.3 Cloning a case

You can create a copy of a case by clicking the *Clone* button in the case header. The case data and the contact data 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. You can edit the case data before saving.

3.2.4 Printing a case

You can print a case by clicking the *Print* button in the case header. A pop-up window is displayed where you can select the desired printer.

3.2.5 Reopening a case

Some business processes include reopen activities which allow to reopen closed cases. These are workflow activities displayed for closed cases. You can execute such an activity to reopen the case. Afterwards, you can [modify the case](#) again and continue its [process](#).

3.2.6 Text classes

Text classes are used to emphasize email, comment and attachment entries in the case history. The entry is highlighted with a certain color and an icon.

Text classes can have different functions:

- Helping the user to find an entry
- Controlling the visibility of an entry in CM/Track, see [Sharing information with customers via CM/Track](#)
- Controlling the business process, e.g. an activity can only be executed if at least one entry is marked with a certain text class

You can change the text class by clicking the icon of the text class.

3.2.7 Time booking

Time bookings are used to track the time which the users spent working on cases in projects.

You can create a manual time booking by clicking the *Time booking* button in the header of the history section of a case or in the user profile. You can enter the time either manually by filling the *Duration* field, or you can select an action which comes with the duration. Afterwards, you need to select a project and click the *Save time booking* button. If you want to correct a time booking, you need to create a new booking with a negative duration. This amount of time is subtracted from the overall time booked on this day.

If automatic time bookings are enabled, 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.

You can view your time bookings in the [user profile](#).

3.2.8 CM/Archive

Old cases which are not needed anymore in the Web Client, but must be kept for reference or regulatory reasons can be archived. 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. You can view an archived case in CM/Archive by clicking *Open in archive application* in the case header. Other actions are not possible.

3.3 Contacts

The contact is the reason for opening a case. Usually, this is a customer who has a request. A case can have one main contact and several additional contacts.

3.3.1 Data models

A contact can either be a company or a person. There are two kinds of data models for contacts:

- **Hierarchical model:** There are companies on the upper hierarchical level and persons on the lower hierarchical level. A person always belongs to one company, and a company can have several persons.
- **Simple model:** There is only one level, which comprises either companies or persons.

A contact always belongs to a [customer group](#).

3.3.2 Customer groups

The customer group determines the [data model](#) and the activities and relations available for its contacts. You get access to contacts by customer group, see [Permissions](#). If you have access to several customer groups, you can select the group which you want to work with in the [customer group filter](#) in the main menu.

3.3.3 Creating a contact

Contacts can be created in the main menu, on the company page or within a case. Click *Create contact* in the main menu, or click the *Add* button in the *Persons* section of a company, or click the *Add* or *Change main contact* button in the *Contacts* section of a case. Fill in the data for the new contact.

In a two-level [data model](#) you have to provide a company before you can enter the data for the person. You can either select an existing company using the [autocomplete search](#) or create a new company after clicking the *Create* link.

3.3.4 Modifying a contact

The following actions are available to modify a contact:

- **Edit contact data:** You can edit contact data using the *Edit* button in the header of the contact or in the *Details* section. Edit the desired contact data and save your changes.
- **Create a case:** You can create a case for a contact by clicking the *Create case* button in the header of the contact. Fill out the required data on the *Create case* page and click *Create*. The *Create case* button is not available for companies in a two-level data model where cases can only be created for persons.
- **Perform contact activities:** You can perform the actions which are available for the current contact in the *Activities* box in the panel on the right. Contact activities can have a form where you have to fill out certain data before proceeding, see [Activities and activity forms](#).
- **Add a comment:** You can add a comment in the *Comments and attachments* section of the contact. Select the *Comment* tab, enter your comment and click the *Add* button.
- **Add an attachment:** You can add an attachment in the *Comments and attachments* section of the contact. Select the *Attachment* tab, select the file which you want to upload and click the *Add* button.

3.3.5 Removing contact data

There are several ways of removing contact data

- **Deactivate a contact:** You can deactivate a contact by clicking the *Deactivate* button in the header of the contact. The contact can only be deactivated if it is not the main contact of any open case. The contact is shown in italics and can still be displayed and edited, but it is not possible to create cases for the contact and the contact will not be found in the search unless the option *Deactivated incl.* is selected. If you deactivate a company, all the persons of the company are also deactivated.

You can make a deactivated contact available again by clicking the *Activate* button in the header of the contact. If the contact is a company, its persons remain deactivated. You have to activate them one by one.

- **Anonymize a person:** You can remove the personal data from a person and her tickets by clicking the *Remove* button in the header of the contact and selecting the *Anonymize* option. Fields containing personal data, history, comments, attachments and relations of the person and her cases are removed. The person and her cases can still be used in reports.
- **Delete a contact:** You can delete a contact by clicking the *Remove* button (person) or *Delete* button (company) in the header of the contact. The contact can only be deleted if he is not the main contact or an additional contact of any open or closed case. If the contact is a person you have the following options:
 - **Delete (keep related data):** Before the contact is removed from the system, his cases and relations have to be transferred to another contact, see [Transferring contact data](#).
 - **Delete (with all related data):** The person is completely removed from the system including all cases and relations. The person is anonymized in the respective history entries of these objects.

For companies, deletion always means that the related data, e.g. its persons, is kept and needs to be transferred to another company, see [Transferring contact data](#).

3.3.6 Transferring contact data

You can transfer the data of a contact to another contact, e.g. before deleting the contact.

1. Click the *Transfer data* button in the section header.
2. Select the contact who should receive the data using the [autocomplete search](#). Select the checkbox *Transfer only open cases* if you want to transfer only open cases.
3. Click *Transfer data and continue* to start the transfer.

3.3.7 Contact-contact relations

Contact-contact relations are links between two contacts, which can belong to the same or different customer groups. You can create a relation in the *Relations* section of a contact.

1. Click the *Add* button in the section header.
2. Select the role of the current contact in the relation from the drop-down list.
3. Select the related contact using the [autocomplete search](#).
4. Click the *Add relation* button.

3.3.8 Contact-resource relations

Contact-resource relations are links between a contact and a resource. You can create a relation in the *Related resources* section of a contact.

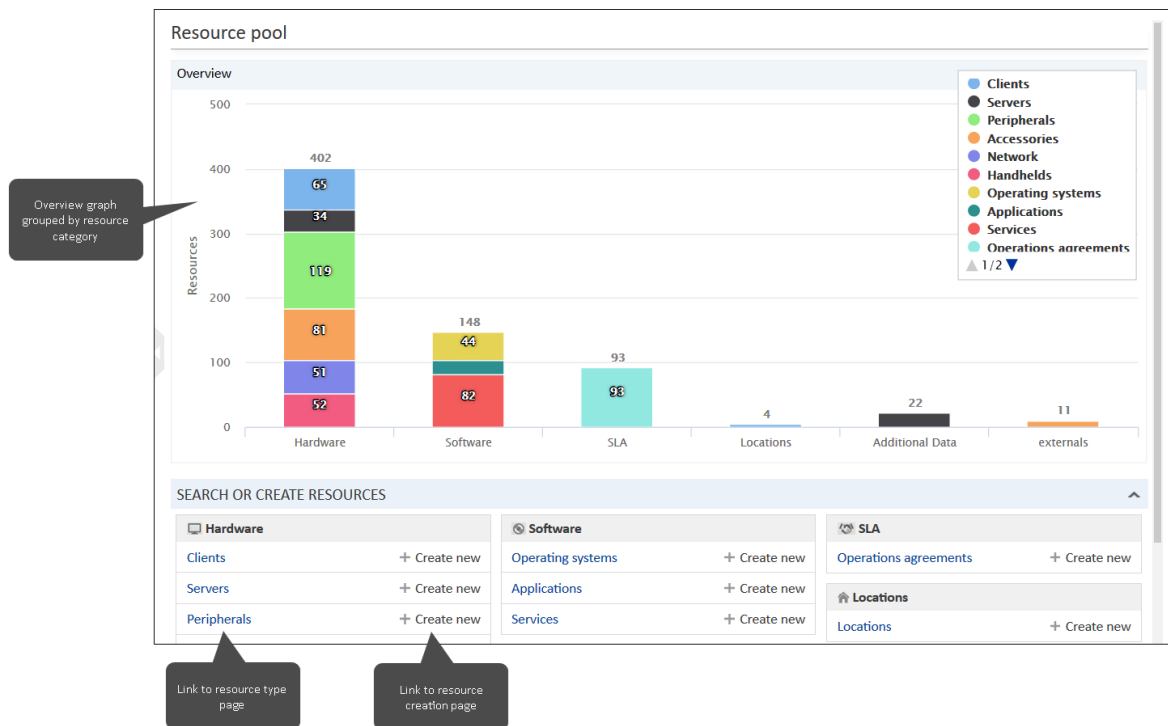
1. Click the *Add* button next to the resource type in the respective resource category.
2. Select the related resource using the [autocomplete search](#).
3. Click the *Add relation* button.

3.4 Resources

Resources are managed with CM/Resource Pool, an optional module which extends the ConSol CM database to manage additional data object. They are used to store assets which are relevant for the business process.

3.4.1 Resource dashboard

The resource dashboard provides an overview of all resources. It is displayed when you click *Resource pool* in the menu bar. A resource always belongs to a resource type. The resource types are grouped in resource categories. The resource type page, which can be accessed by clicking the resource type on the dashboard, contains a table listing all the resources which belong to it.



3.4.2 Actions for resources

The following actions for resources are available:

- **Create a resource:** Resources can be created on the resource dashboard or on the resource type page. Either click the *Create new* button next to the respective resource type on the dashboard, or click the *Create* button in the header of the resource type page. Fill out the data fields and click the *Create resource* button.
- **Edit resource data:** You can edit resource data by clicking the *Edit* button in the header or in the *Details* section. Edit the desired resource data and save your changes.

- **Add a comment:** You can add a comment in the *Comments and attachments* section of the resource. Select the *Comment* tab, enter your comment and click the *Add* button.
- **Add an attachment:** You can add an attachment in the *Comments and attachments* section of the resource. Select the *Attachment* tab, select the file which you want to upload and click the *Add* button.
- **Perform a resource activity:** You can perform the actions which are available for the current resource in the *Activities* box in the panel on the right. Resource activities can have a form where you have to fill out certain data before proceeding, see [Activities and activity forms](#).
- **Deactivate / activate a resource:** You can deactivate a resource by clicking the *Deactivate* button in the header of the resource. The resource is shown in italics and can still be displayed and edited, but it will not be found in the search unless the option *Deactivated incl.* is selected. Additionally the resource cannot be used in relations anymore. You can make a deactivated resource available again by clicking the *Activate* button in the header of the resource.
- **Delete a resource:** You can delete a resource by clicking the *Delete* button in the header of the resource. If the resource has relations, you either have to transfer the relations to another resource of the same type before deleting the resource, or delete the relations together with the resource.

3.4.3 Resource-resource relations

Resource-resource relations are links between two resources. You can create a relation in the *Related resources* section of a resource.

1. Click the *Add* button next to the resource type in the respective resource category.
2. Select the related resource using the [autocomplete search](#).
3. Click the *Add relation* button.

3.4.4 Resource-contact relations

Resource-contact relations are links between a resource and a contact. You can create a relation in the *Related companies and persons* section of a resource.

1. Click the *Add* button in the section header.
2. Select the role of the current resource in the relation from the drop-down list.
3. Select the contact using the [autocomplete search](#).
4. Click the *Add relation* button.

3.4.5 Resource-case relations

Resource-case relations are links between a resource and a case. You can create a relation in the *Related cases* section of a resource.

1. Click the *Add* button in the section header.
2. Select the role of the current resource in the relation from the drop-down list.

3. Select the case using the [autocomplete search](#).
4. Click the *Add relation* button.

3.5 CM/Track

CM/Track is the primary access point to the system for external users. These can be either your customers or colleagues who do not work with the Web Client. CM/Track allows the external users to create requests and check their status.

3.5.1 Credentials for CM/Track users

The credentials to log in to CM/Track are managed on the contact page of the user who needs access to CM/Track. Proceed as follows to grant access to CM/Track to a contact:

1. Open the contact page and click the *Edit* button in the header.
2. Fill out the fields for the CM/Track user name and password.
3. Select a profile, which contains the access permissions, in the *Portal user profile* field.

3.6 Processes

3.6.1 Activities and activity forms

Activities are actions which the user performs according to the defined process. They are available in the following objects:

- **Cases:** 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.
- **Contacts:** Contact activities allow you to perform certain actions for the current contact. They depend on the customer group which the contact belongs to. You can perform a contact activity at any time.
- **Resources:** Resource activities allow you to perform certain actions for the current resource. They depend on the resource type which the resource belongs to. You can perform a resource activity at any time.
- **Detail searches:** 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. The activity is executed for all the selected elements on the current page.

If the activity has a form, the form is displayed after clicking the activity. You have to fill out the form and click *Save and continue* to proceed. Some fields might be prefilled with default values or data from the current object. Required fields which must be filled out are indicated by a red asterisk. If you cancel the form, the activity is not executed.

3.6.2 Approval processes

Some business processes include approval processes where an authorized person, called “approver”, takes a decision regarding the further processing of a case. The approver needs to be added as an [additional assignee](#). This can either happen automatically in a workflow activity, or manually. 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

3.6.3 Representations

Representations are temporary replacements between colleagues. They have the following effects:

- **Emails**
The representing user can receive a copy of the emails which are sent from ConSol CM to the represented user's email address. It depends on the system configuration which emails you receive.
- **Case list**
An option to see the view through the eyes of the represented user is added to the case list of the representing user, i.e. if you represent someone, you can see the cases of the represented user in the case list by selecting this user in the *Assignee* field.

The following aspects are not affected by representations:

- **Permissions**
The representing user does not receive the [permissions](#) of the represented user, i.e. even if you represent someone, you only see the cases which you are allowed to see.
- **History**
The representing user always acts in his own name, i.e. even if you represent someone, all your actions are logged under your name.
- **Case list**
The representing user does not get the views of the represented user, i.e. even if you represent someone, you only have your own views.

You can see your representations in the [user profile](#). Usually, you select someone to represent you in the *Colleagues representing me* field in the *Representation* section. If you have the required permissions, you can also set yourself as a representation of a colleague in the *Colleagues represented by me* field. You can end the representations by clicking *Cancel the representation* in the context menu next to the user name.

3.7 User interface

3.7.1 Calendar

Calendars are integrated Microsoft Outlook calendars which can be shown on case, contact and resource pages and on the dashboard. You can view your appointments and add or remove an appointment.

3.7.2 Dashboard

The dashboard is displayed in the main panel after logging in and when clicking the product icon in the upper left corner. It consists of different widgets, which can be grouped in one or more tabs.

The following standard widgets can be shown:

- Charts, e.g. column charts, pie charts, or funnel charts
- 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

3.7.3 Keyboard shortcuts

You can use the following keyboard shortcuts:

- Jump to the [quick search](#) by pressing the f key.
- Execute an [activity](#) for the current object (case, contact, resource or search). Press Alt+1 for the first activity in the list, Alt+2 for the second activity, and so on.

3.7.4 Relation graphs

Object sections which show linked objects can be displayed either as a list (default) or as a graph. You can click the *Graph* link in the section header to display the section as a graph. Each object is represented by its icon and linked objects are connected with arrows. You can open the page of an object in the graph by double-clicking its icon.

4 Troubleshooting

4.1 CM/Doc

4.1.1 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, see [Using CM/Doc with HTTPS](#).

4.1.2 Using CM/Doc with 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.

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