Web Service Request Management (webSRM)

User Manual

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Author:	Kai Schönherr, Christian Jäckisch
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1 Preliminary remarks

1.1 About this document

The following formatting is used in this document:

➢ Keys or buttons are written italic, e.g. *ENTER-Key (button)*

1.2 Purpose and intention

The toolset WebSRM is international platform that provides managed desktop services (MDS processes), i.e. supply chain processes**,** break and fix processes, for the T-Systems delivery units.

The main features are:

- A sophisticated role concept to limit the data view of the different delivery units, i.e. granting user access on several access levels (customer, function, region).
- Multi-lingual (planned). As a first step English and German are provided.

1.3 System architecture

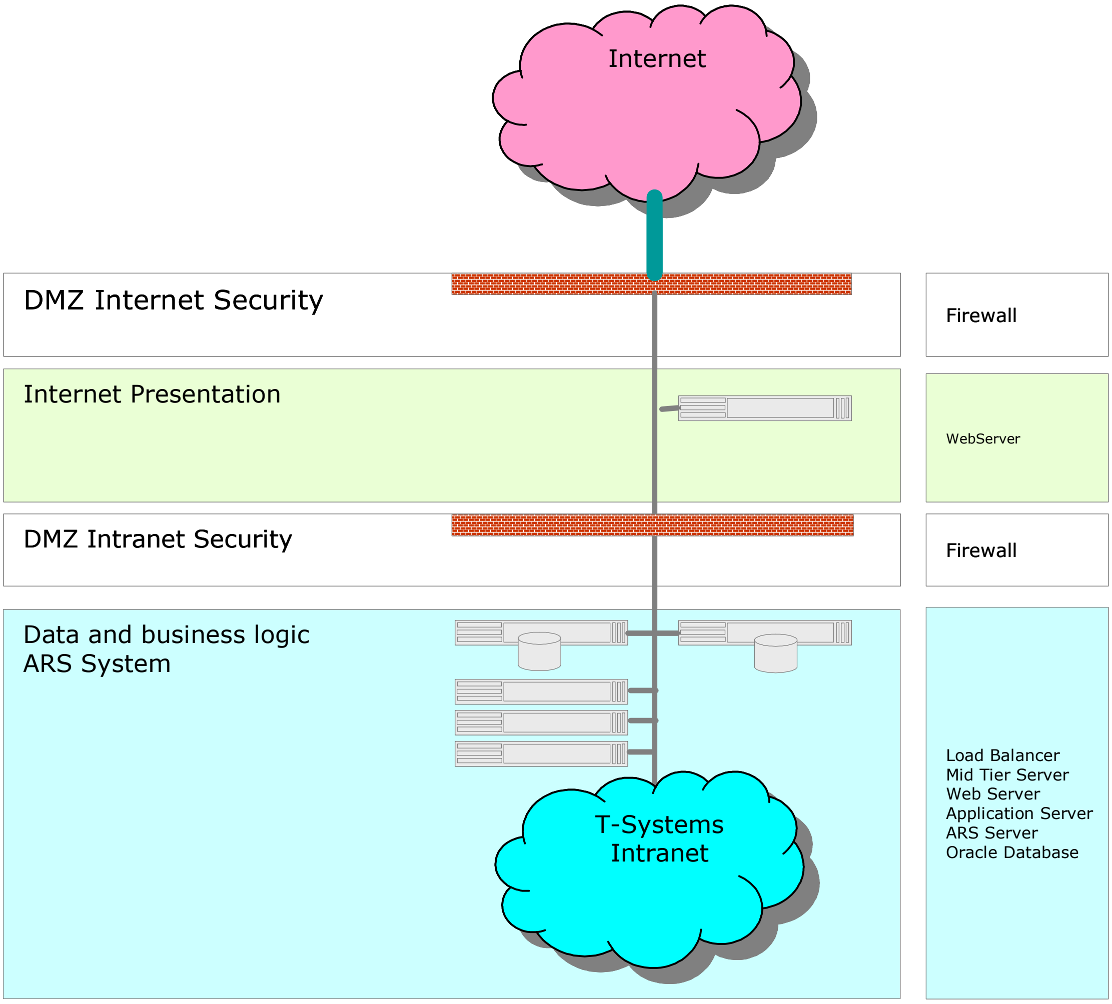


Fig. 1 System architecture

1.4 System overview

The application WebSRM consists of the following modules:

- Login panel
- Start Center
- Service Request Management
- Task Management
- Incident Management
- Service Level Management
- Configuration Management
- Local Business Unit Administration

1.5 Technical requirements

- Supported browsers:

Browser						
Platform	**Name**	**Version**	**Edition**	**Name**	**Version**	**Comments**
HP PA-RISC 2.x CPU	**HP-UX**	11, 11i		Mozilla	1.7+	
IA-32 PC Compatible	**Microsoft Windows**	2000	Advanced Server, Datacenter, Professional, Server	Microsoft IE	6	
IA-32 PC Compatible	**Microsoft Windows**	2000	Datacenter, Advanced Server, Server, Professional	Netscape	7.2	
IA-32 PC Compatible	**Microsoft Windows**	2000	Server, Advanced Server, Datacenter, Professional	Mozilla	1.7	
IA-32 PC Compatible	**Microsoft Windows**	2003	Datacenter, Enterprise, Standard, Professional	Microsoft IE	6	
IA-32 PC Compatible	**Microsoft Windows**	2003	Datacenter, Enterprise, Standard, Web Server, Professional	Mozilla	1.7	
IA-32 PC Compatible	**Microsoft Windows**	2003	Datacenter, Enterprise, Standard, Web Server	Netscape	7.2	
IA-32 PC Compatible	**Microsoft Windows**	XP	Professional	Microsoft IE	6	
IA-32 PC Compatible	**Microsoft Windows**	XP	Professional	Mozilla	1.7	
IA-32 PC Compatible	**Microsoft Windows**	XP	Professional	Netscape	7.2	
IA-32 PC Compatible	**Redhat Linux**	3	Enterprise Linux WS/AS/ES	Mozilla	1.7	
IA-32 PC Compatible	**SuSE**	8	Standard Server, Enterprise Server, Desktop	Mozilla	1.7	
PowerPC, G3/4	**Macintosh**	10.1+		Netscape	7.2+	
IBM pSeries, p5	**AIX**	5L (5.1, 5.2, 5.3)		IBM Mozilla	1.7	
Sparc	**Solaris**	8, 9, 10		Mozilla	1.7	
Note:	- For optimal browser colors in AR System forms, set the color depth in the client system to at least 24 bits. - HTTP Version 1.1+ required					

- Browser settings: Language: „English“, e. g. English [en] or English (USA) [en_us]
- Screen resolution: 1024 x 768 pixels

1.6 Support

Contact date for your support:

Phone:	+49(0)1805 224 511
Fax:	+49 (0)1805 3344900456
E-Mail:	OLiBSS.Help@t-systems.com
Agent availability:	7 days, 24 hours

1.7 Run the application

1.7.1 Login

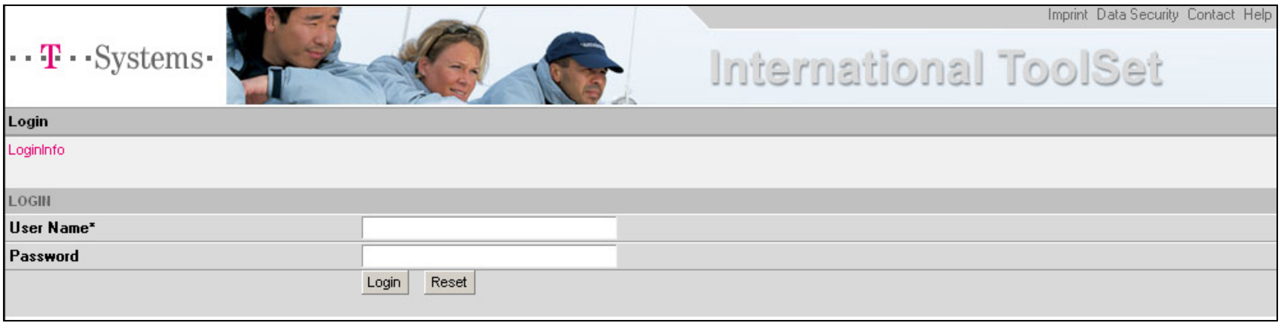


Fig. 2 Login page

webSRM will be started by the URLs:

Internet :	https://websrm.t-systems.com
Intranet :	http://websrm.telekom.de

For the login enter user name and password. Press *Login*. After the successful login the start center will appear. With the button *Reset* the account information (user name, password) can be reset.

> Important:
> If you login for the first time with a simple password or no password, modify your profile by checking your personal data like phone, fax, and email address and so on and modify your password by entering a new password that only you know. **This is strongly recommended.**

> Hint:
> If you bookmark the link to this application, never bookmark the login page. This mostly leads to errors when you login the next time. Bookmark the link listed in this chapter, depending on your connectivity (internet or intranet).
> Do not use the internet-link from the intranet or vice versa. This might also lead to errors.

1.7.2 StartCenter

Module overview

Account information

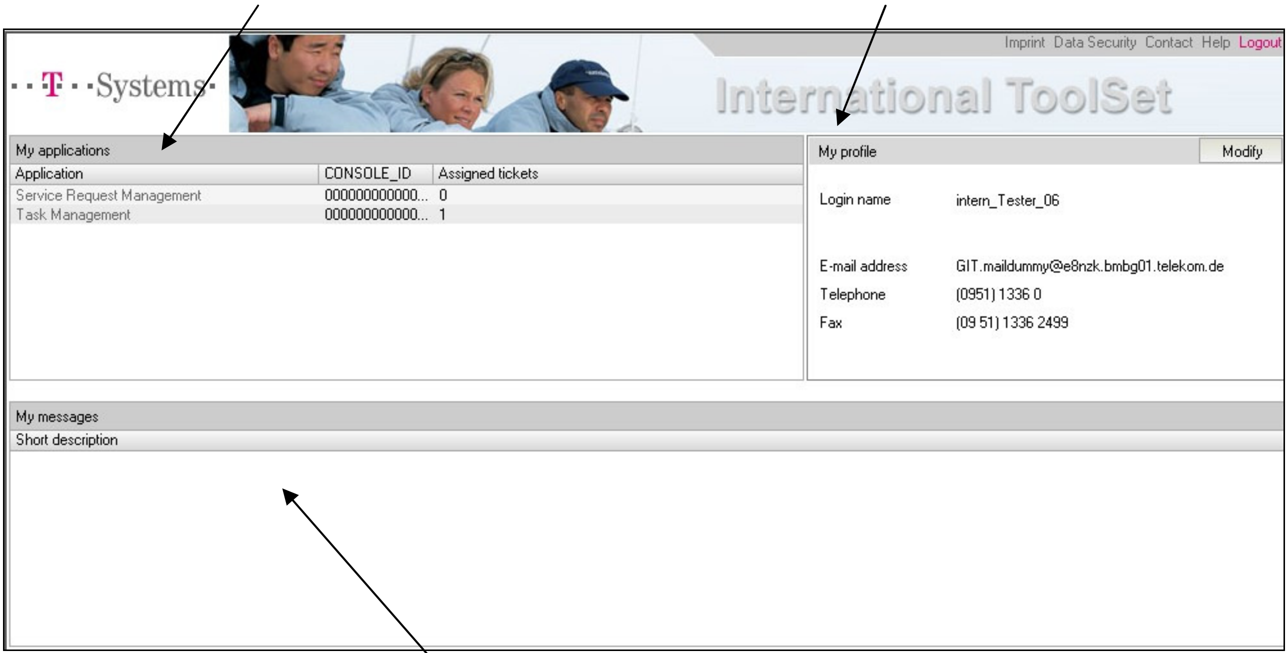


Fig. 3 Start Center Frontend

Messages

The start center consists of the following features:

- An overview of the existing modules (My application)
- The account information of the current user (My Profile)
- A list of messages assigned to the user (My messages)

My Applications

Click here to open the module

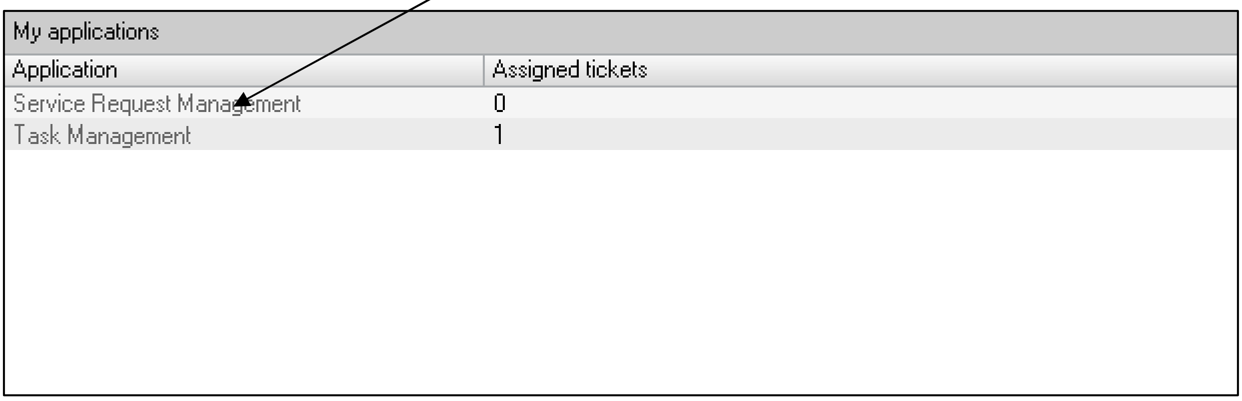
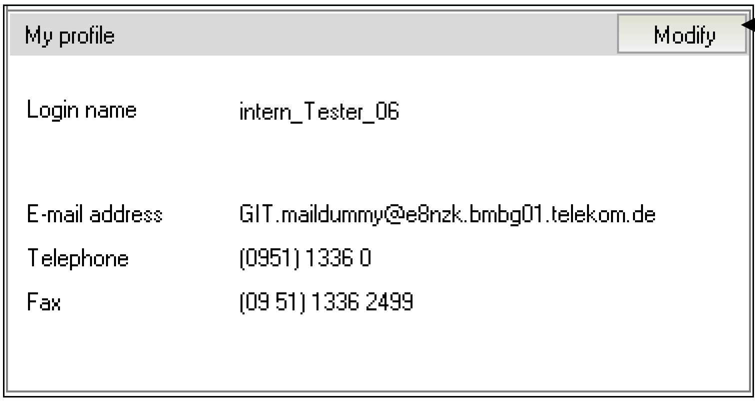


Fig. 4 Start Center Frontend My Applications

Application: Here you can select an application (module).
Assigned Tickets: For each module the number of tickets assigned to the user is shown.

My Profile



Click here to modify the account information

Fig. 5 Start Center Frontend - My Profile

With the button *Modify* the account information of the current user can be changed, the absence can be put in for the task planer and the current roles of my account are shown in a table of the following dialog.

You can change the values and save them to the database by clicking the *Finish* button on the last page.

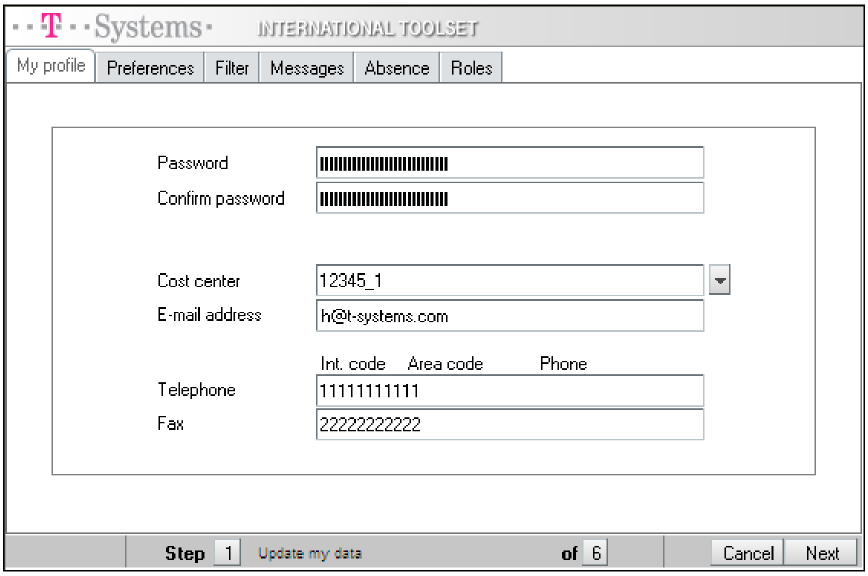


Fig. 6 Start Center – Modify my profile – profile data

Your personal data and password can be changed on the first page.

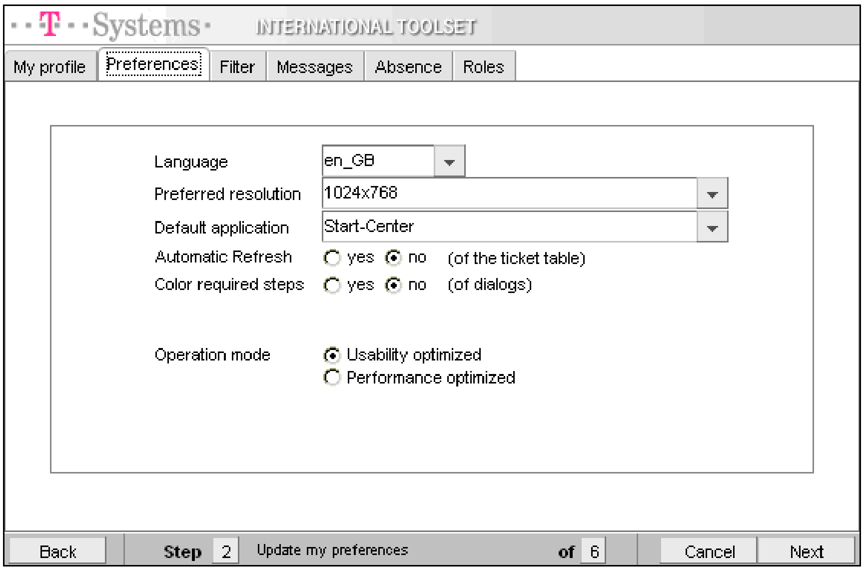


Fig. 7 Start Center – Modify my profile – preferences

On the second page, personal preferences regarding the usability can be changed.

The preferred resolution “1280x1024” is only available for the task management. The other applications will be shown in “1024x768” as usual.

If **Color required steps** is set, the steps which contain required fields on the function dialogs the labels are colored.

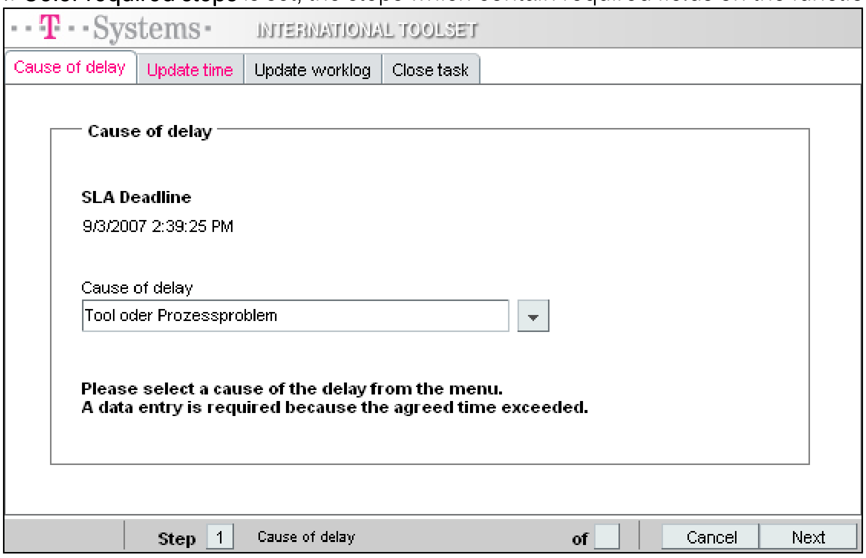


Fig. 8 Function Close task with colored step labels of the required steps

The **operation mode** (if available) determines the two modes, that are available. “Usability optimized” means, the user is supported in his actions as only functions are shown, that really can be applied to the selected data. The tools switches the functions according to the role the user has for the company of the selected data. This could be several different companies in the table, if the user is configured for multiple companies.

On the other side “Performance optimized” means, that the user will see all functions and has to know on his own which function to apply. If he uses the wrong function for the selected data, he gets an error. If the user is configured for multiple companies, he has to change from one company or country to another with the help of the menus that appear on the right upper side.

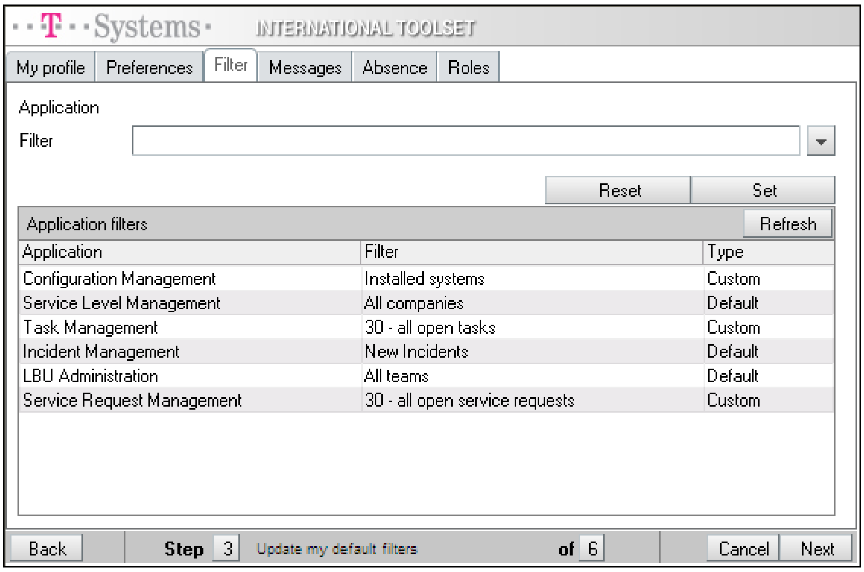


Fig. 9 Start Center – Modify my profile – filter

For every application you can define the default filter for you personally, applied directly when you open the window. You can set one of your choice and set the type to custom, or reset to the default filter which is defined for all users.

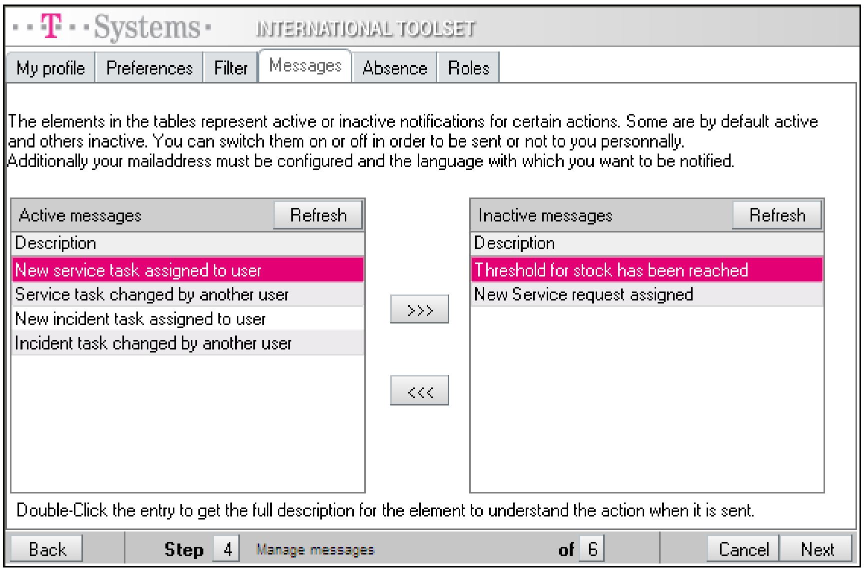


Fig. 10 Start Center – Modify my profile – messages

Here you activate or deactivate messages that are sent to you.
Some of them are by default activated and other not.
Please make sure, that you have a valid email address.

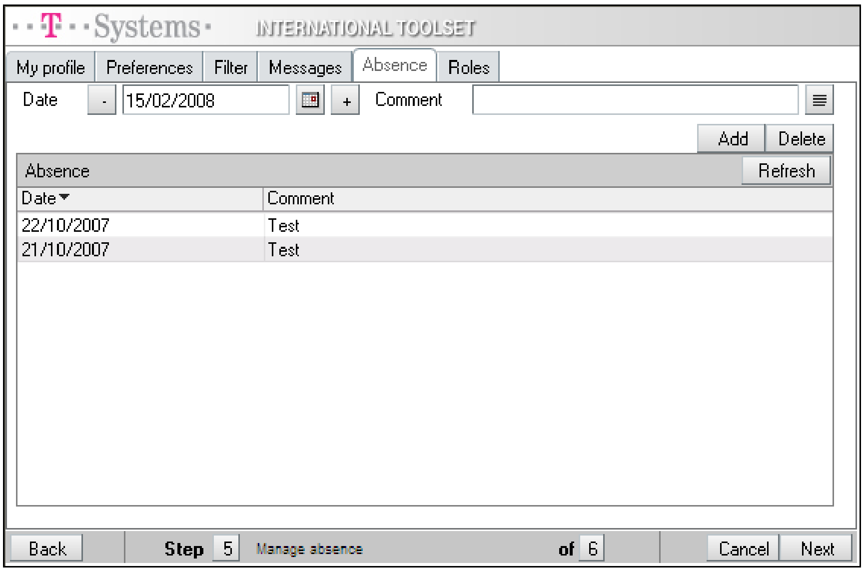


Fig. 11 Start Center – Modify my profile – absence

To put in the times of absence you select the date, fill in a comment and click the “Add”-Button. To delete an absence date of the table, select it and press the “Delete”-Button. These dates are shown hatched in the task scheduler table to indicate to the planning personnel that you are not working at this time.

Your current roles are shown on the following page.

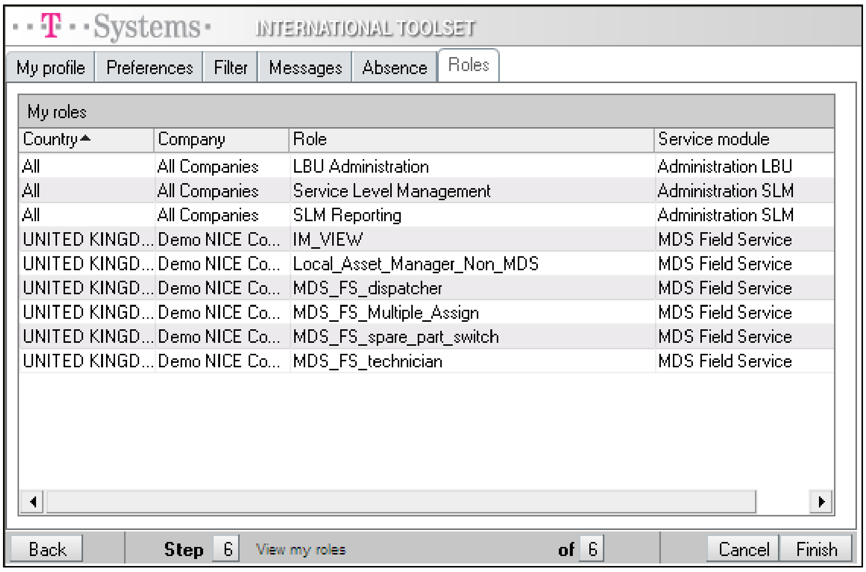


Fig. 12 Start Center – Modify my profile – roles

My Messages

Fig. 13 Start Center Frontend - My Messages

1.7.3 Global Navigation

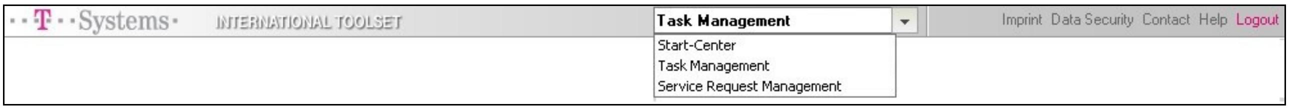


Fig. 14 Global Navigation Panel

In each module a menu is implemented for the global navigation within the application WebSRM. The menu contains the main functions (Start Center, Task Management, etc.).

1.7.4 Logout

Fig. 15 Logout page

To leave the application WebSRM click on the button *logout*. Don't close the browser without logging out.

2 Sitemap

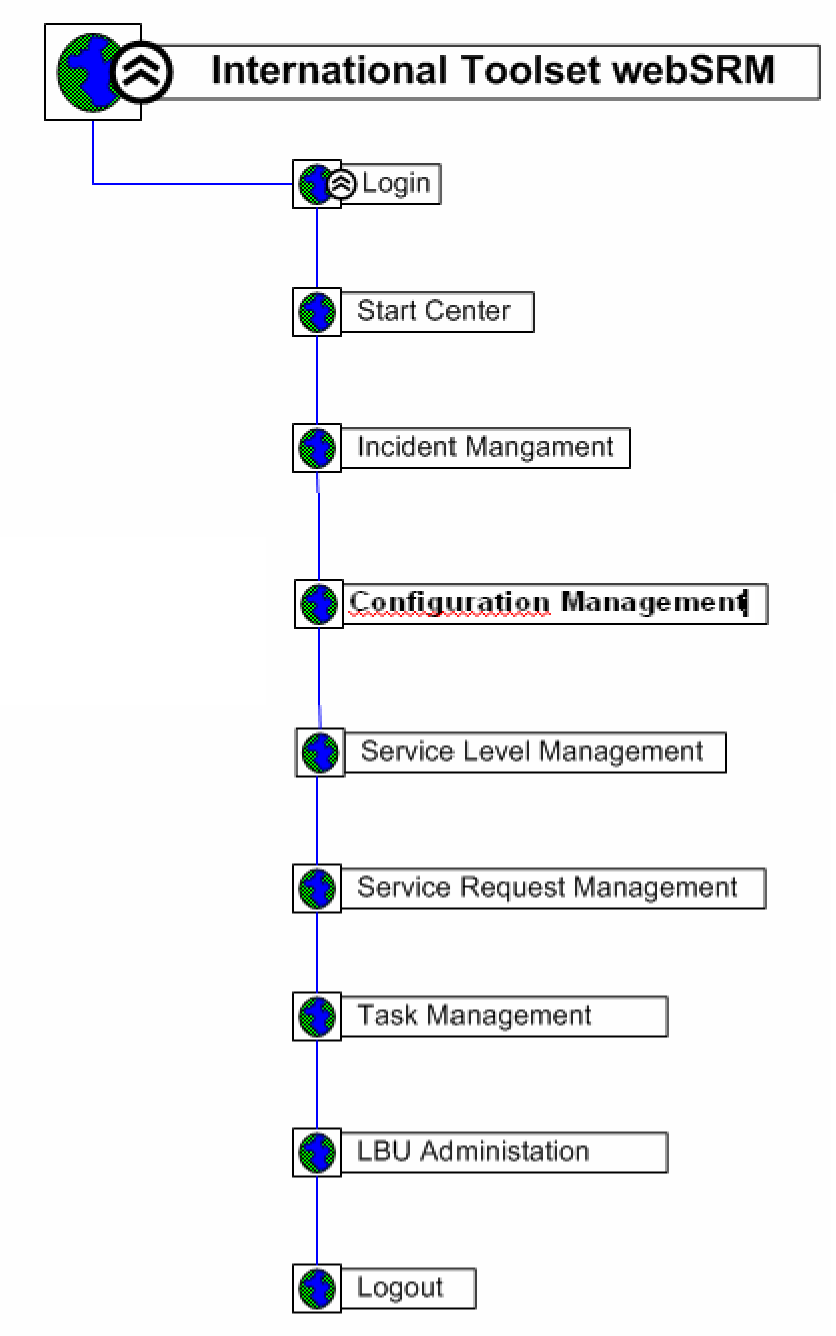


Fig. 16 Sitemap

3 Modules

3.1 Common functions

The following functions are available in all modules.

3.1.1 Action: Reports

In this function are all custom reports available, which had been created for the related module. To get a custom report a requirement is necessary. To show the custom report to users for executing, the webSRM support team has to set up the configuration of user or teams.

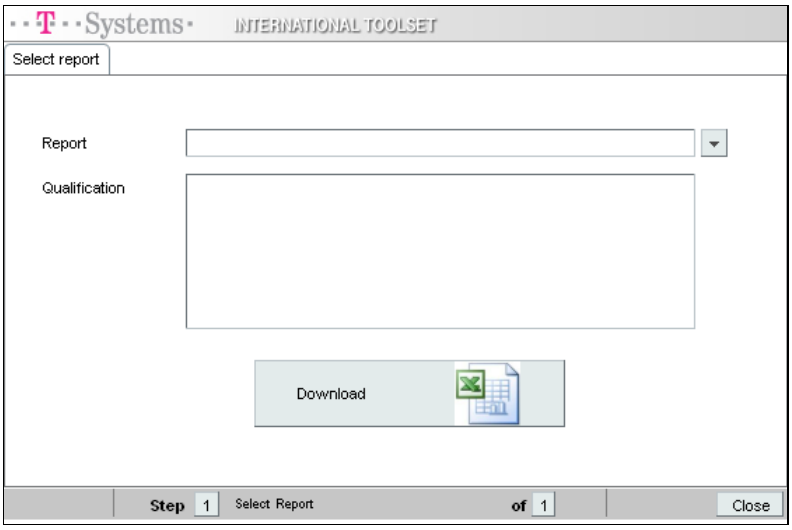


Fig. 17 Common – Reports

3.1.2 Action: Manage advanced filter search

TODO

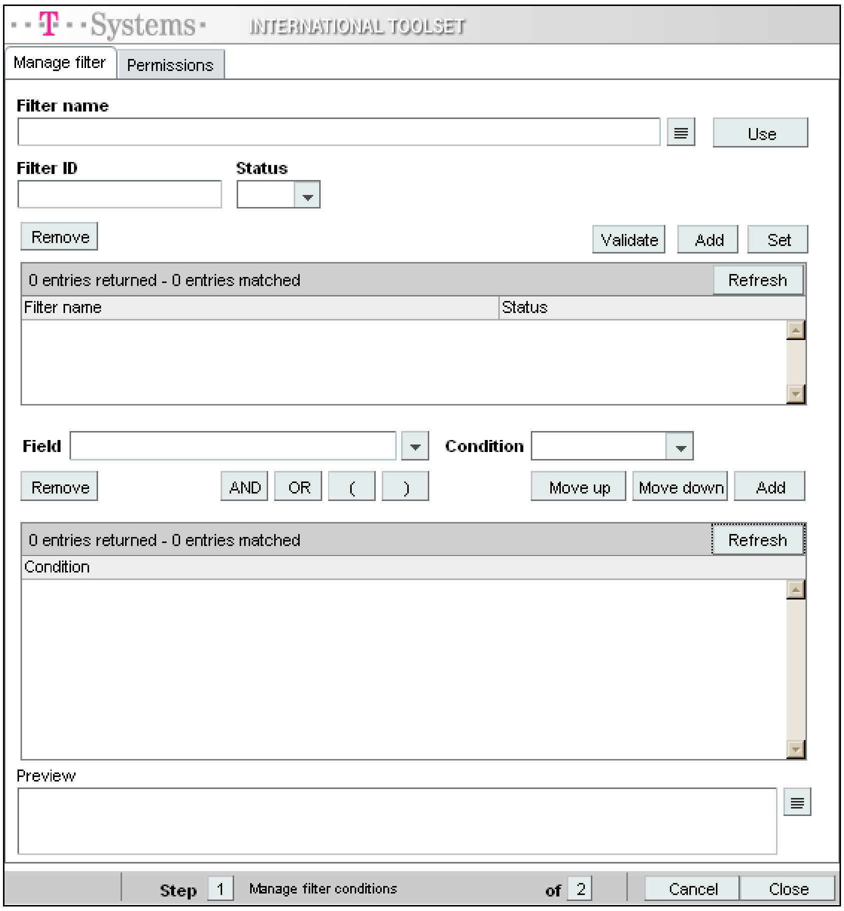


Fig. 18 Common – Manage advanced filter search – Manage filter

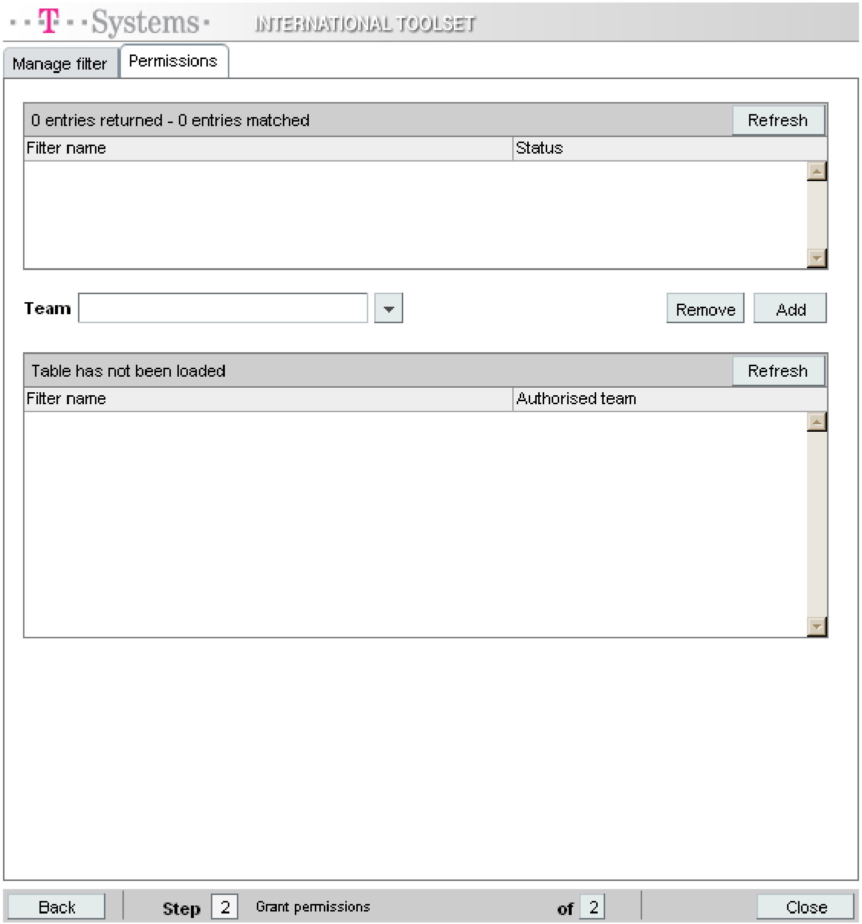


Fig. 19 Common – Manage advanced filter search – Permissions

3.2 Service Request Management

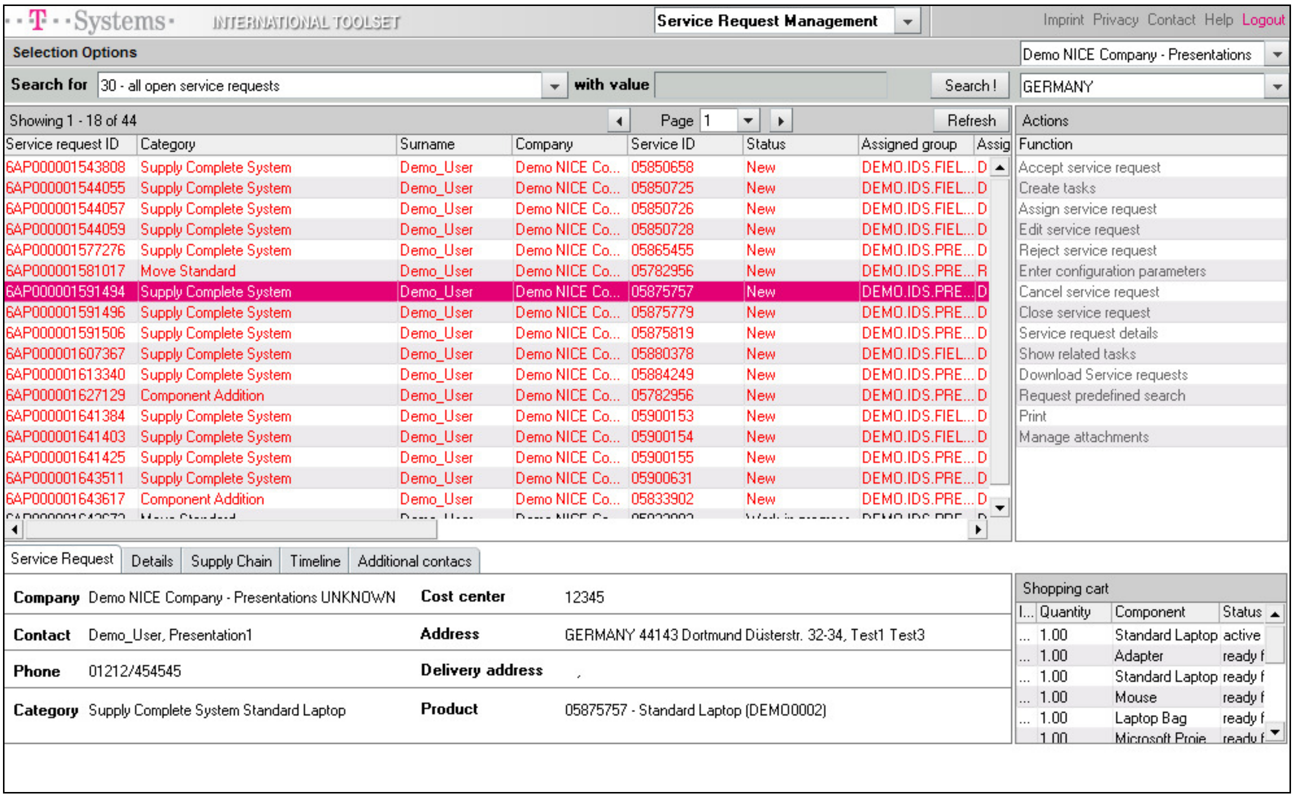


Fig. 20 Service Request Management Frontend

The Service Request Management consists of

- the selection option panel (at the top of the page)
- the service request overview (in the middle of the page)
- the service request action panel (on the right frame of the page)
- the detailed information of the selected service request (on the bottom of the page)

By default all service requests which can be processed by the user according to his access rights are shown (complying with the filter “all assigned (DEFAULT)”).
While no service request is selected in the service request overview the service request action panel in the right frame and the service request detail panel on the bottom of the page are empty.

In the module Service Request Management the user can process the service request information that has been entered by the customer via the web portal ICT Lounge (standard services only). The entered service request will be transferred to WebSRM and will appear in the service request management overview with the status “new”. In the module service request management the user can edit, accept, reject or cancel the service request. Furthermore he can assign the service requests to other employees. With the function Show related tasks he can skip to the module Task Management. There all tasks created to this service request will be shown in the task overview.

Selection Options Panel

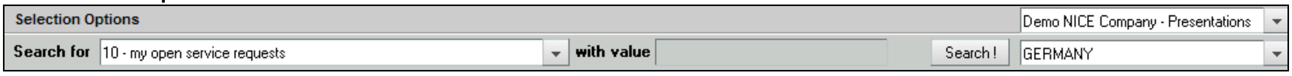


Fig. 21 Service Request Management Frontend - Selection Options Panel

You can reduce the number of service requests displayed in the service request overview by using pre-defined filters. A filter consists of the filter name ("search for") and a value ("with value") as an additional search criterion, if necessary. If no additional value is required for the filter the field "with value" is write-protected.

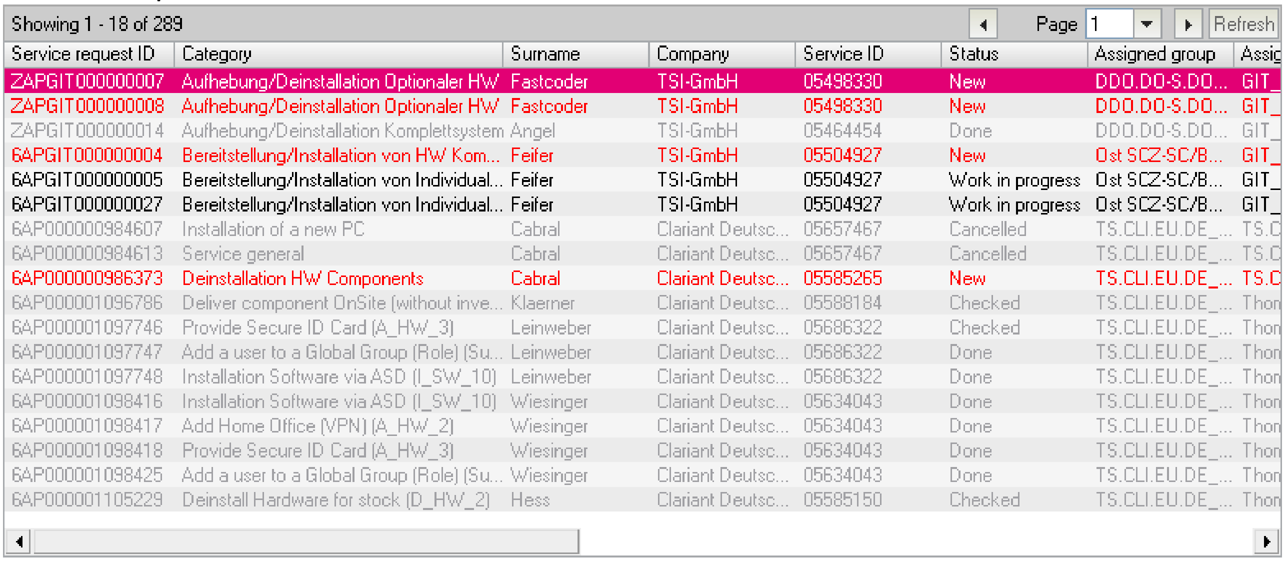
<u>Search for</u>
Here you can select a pre-defined filter to reduce the number of service requests. Only those service requests will be displayed who match the criteria.

<u>With value</u>
In this field additional search criteria must be entered if required by the filter definition.

Filter examples:

- **10 - my open service requests:** Shows all service requests which can be processed by the user according to the user's rights.
- **Search for service requests for company in field "with value":** Shows all service requests related to a special company. This filter requires a value i.e. in this case the name of a company.

Service Request Overview



Showing 1 - 18 of 289 Page 1 Refresh

Service request ID	Category	Surname	Company	Service ID	Status	Assigned group	Assig
ZAPGIT000000007	Aufhebung/Deinstallation Optionaler HW	Fastcoder	TSI-GmbH	05498330	New	DDO.DO-S.DO...	GIT_
ZAPGIT000000008	Aufhebung/Deinstallation Optionaler HW	Fastcoder	TSI-GmbH	05498330	New	DDO.DO-S.DO...	GIT_
ZAPGIT000000014	Aufhebung/Deinstallation Komplettsystem	Angel	TSI-GmbH	05464454	Done	DDO.DO-S.DO...	GIT_
6APGIT000000004	Bereitstellung/Installation von HW Kom...	Feifer	TSI-GmbH	05504927	New	Ost SCZ-SC/B...	GIT_
6APGIT000000005	Bereitstellung/Installation von Individual...	Feifer	TSI-GmbH	05504927	Work in progress	Ost SCZ-SC/B...	GIT_
6APGIT000000027	Bereitstellung/Installation von Individual...	Feifer	TSI-GmbH	05504927	Work in progress	Ost SCZ-SC/B...	GIT_
6AP000000984607	Installation of a new PC	Cabral	Clariant Deutsc...	05657467	Cancelled	TS.CLI.EU.DE_...	TS.C
6AP000000984613	Service general	Cabral	Clariant Deutsc...	05657467	Cancelled	TS.CLI.EU.DE_...	TS.C
6AP000000986373	Deinstallation HW Components	Cabral	Clariant Deutsc...	05585265	New	TS.CLI.EU.DE_...	TS.C
6AP000001096786	Deliver component OnSite (without inve...	Klaerner	Clariant Deutsc...	05588184	Checked	TS.CLI.EU.DE_...	Thon
6AP000001097746	Provide Secure ID Card (A_HW_3)	Leinweber	Clariant Deutsc...	05686322	Checked	TS.CLI.EU.DE_...	Thon
6AP000001097747	Add a user to a Global Group (Role) (Su...	Leinweber	Clariant Deutsc...	05686322	Done	TS.CLI.EU.DE_...	Thon
6AP000001097748	Installation Software via ASD (I_SW_10)	Leinweber	Clariant Deutsc...	05686322	Done	TS.CLI.EU.DE_...	Thon
6AP000001098416	Installation Software via ASD (I_SW_10)	Wiesinger	Clariant Deutsc...	05634043	Done	TS.CLI.EU.DE_...	Thon
6AP000001098417	Add Home Office (VPN) (A_HW_2)	Wiesinger	Clariant Deutsc...	05634043	Done	TS.CLI.EU.DE_...	Thon
6AP000001098418	Provide Secure ID Card (A_HW_3)	Wiesinger	Clariant Deutsc...	05634043	Done	TS.CLI.EU.DE_...	Thon
6AP000001098425	Add a user to a Global Group (Role) (Su...	Wiesinger	Clariant Deutsc...	05634043	Done	TS.CLI.EU.DE_...	Thon
6AP000001105229	Deinstall Hardware for stock (D_HW_2)	Hess	Clariant Deutsc...	05585150	Checked	TS.CLI.EU.DE_...	Thon

Fig. 22 Service Request Management - SR Overview

The service request list can be sorted by column. Just click on the surname for example and the list will be sorted after surnames.
To refresh the panel click on the button *Refresh*.
With the arrow keys you can skip from one page to another.
Selecting a service request will highlight the related row in magenta.
The different colours of the rows mark the data as new tickets, known tickets and closed tickets.

Service Request Actions Panel

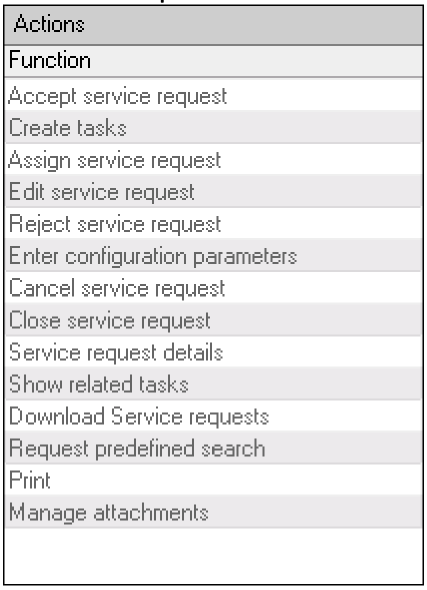


Fig. 23 Service Request Management - SR Actions Panel

In the actions panel a list of functions for the processing of the selected service request is displayed. The number of functions shown in the actions panel depends on several criteria like the status of the order, the role concept and the resultant access rights assigned to the user.

3.2.1 Action: Accept SR

The function “Accept SR” is displayed in a separate window. In this dialog you can accept all tasks for a special order ID in the shopping cart.
At the top of the panel all service requests related to an order ID are shown. Here you can select a service request.
Below you can see the following tabs:

- Shopping cart
- Customer components (asset)
- Related service requests

Shopping cart:	All components related to the selected service request are displayed.
Customer components (asset):	All components in the asset of the customer are shown.
Related service requests:	All service requests related to service request currently processed are displayed (with different order IDs). For example a service request for a move (for the same service ID) may be shown in this list.

For the acceptance of the service requests the following steps are required:

1. A service request must be selected in the list above.
2. The shopping cart and the components in the customer asset have to be checked.

Service request parameters have to be maintained in a separate dialog. Click on the button *Edit delivery / config location* to open the dialog. For further information concerning this function see:

3. The steps 1 – 3 must be repeated for each service request related to the current order ID.
4. With the button *Finish* all service requests can be accepted.

Click on the button *Print service request data* to print the service request information.

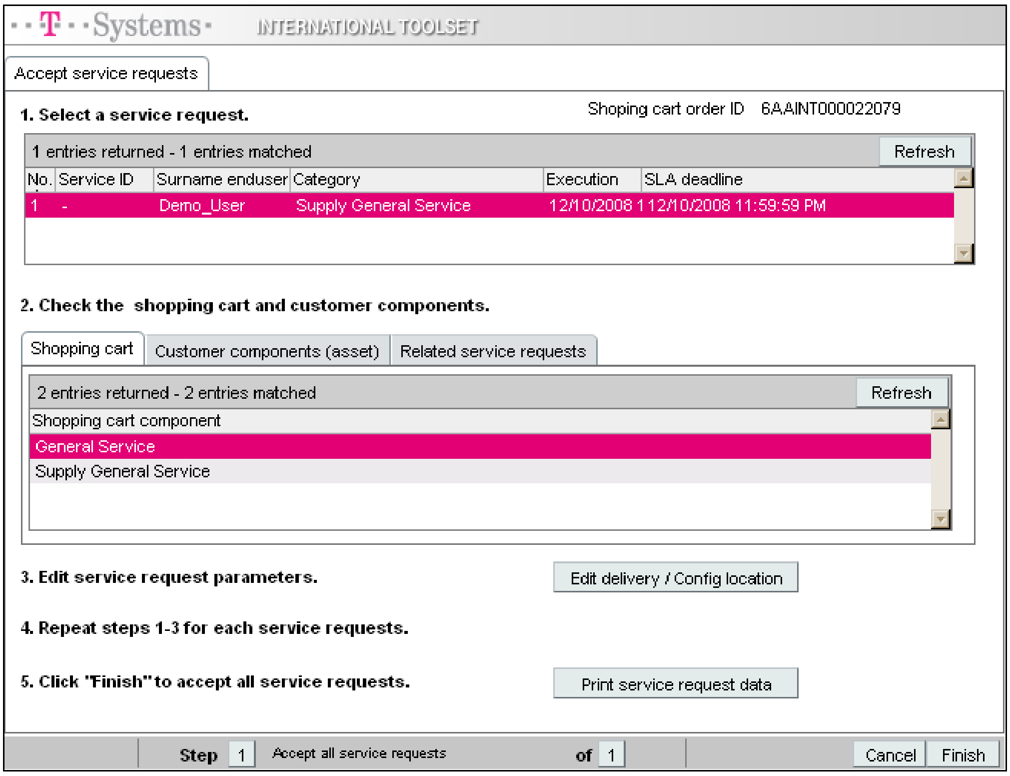


Fig. 24 Service Request Management – Function “Accept service request”

3.2.2 Action: Edit SR

The function “Edit SR” is displayed in a separate window. In this dialog a new date can be entered if the customer desired date has been changed.

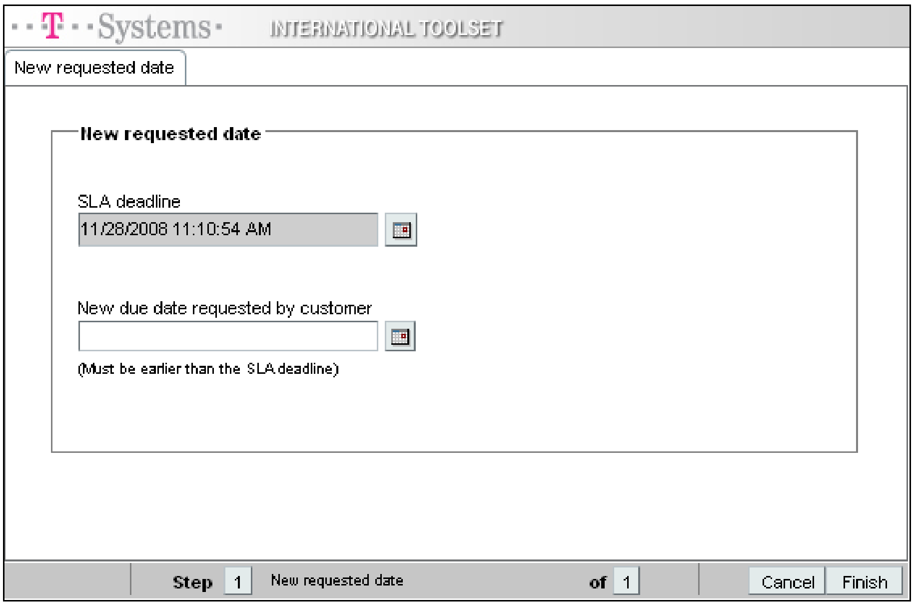


Fig. 25 Service Request Management – Function “Edit service request”

3.2.3 Action: Enter configuration parameters

The function “Enter configuration parameters” is displayed in a separate window. In this dialog you can maintain the configuration parameters for a service request.

The dialog consists of the following steps:

- Delivery information
- Location/Contact
- Components

Delivery information: Delivery information like “Place of configuration”, “Delivery date” and “Service module” can be defined.

Location / Contact: With the field “Place of delivery” the user can choose whether the goods or services shall be delivered to the customer location or the field service location. Press the button “Field service places of delivery” to select a location of the field service from the field service location list or reset the location to the customer location with the button “Change to customer location”. With the button “Field service contact person” the contact data of the field service can be provided. The contact data for the field service is needed by the logistics service provider to inform the field service about potential problems.

Components: This tab shows whether the ordered components in the shopping cart have already been demanded from the logistics service provider or not.
Two lists are shown:

- A list of ordered components designated for logistics demand
- A list of components already demanded from logistics service provider

With a click on the button “Finish” the logistics demand for the ordered components will be initiated.

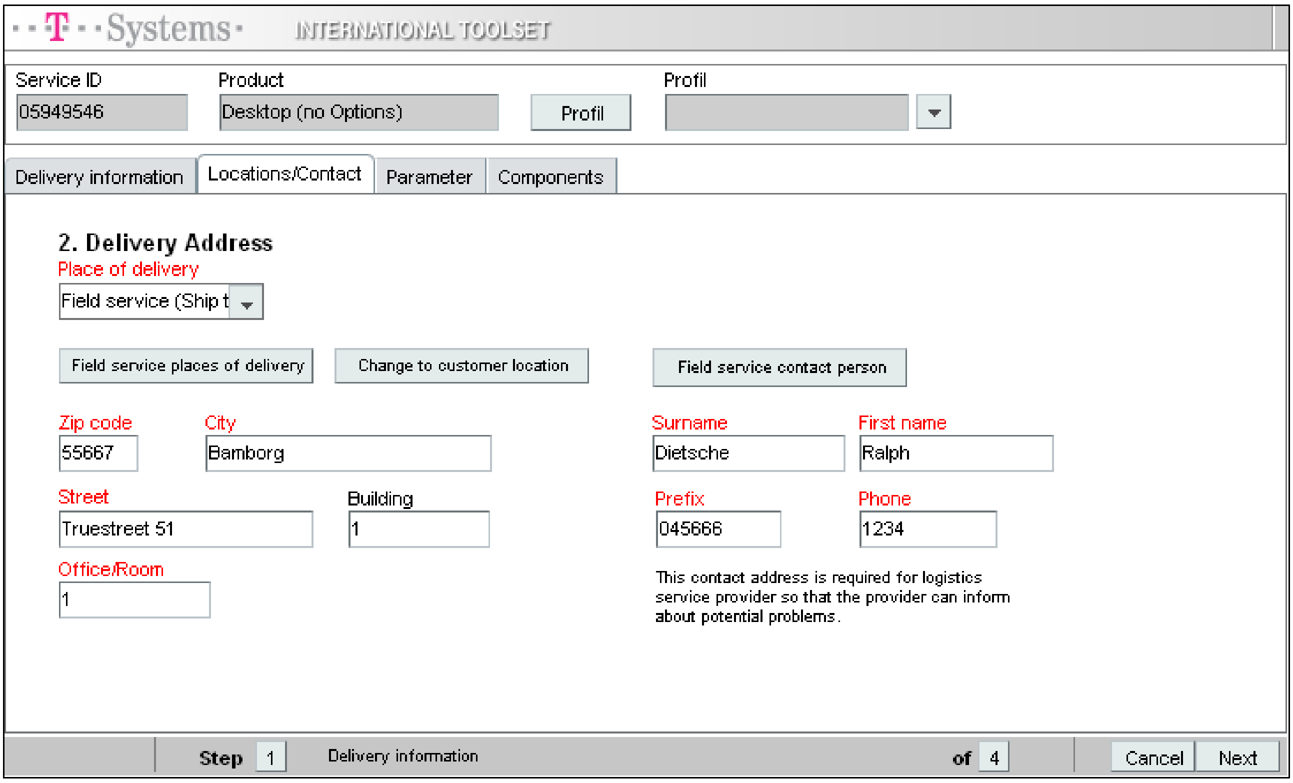


Fig. 26 Service Request Management – Function “Enter configuration parameters”

3.2.4 Action: Close SR

With this link the service request can be closed. A message will be shown and the status of the service request will be changed to “checked”. The system will automatically change the status of the service request to “closed” if there are no more service requests related to the current service request with status not equal “checked”.

Fig. 27 Service Request Management – Function “Close service request”

3.2.5 Action: Assign SR

The function “Assign SR” is displayed in a separate window. In this dialog you can assign the service request to an assignee group and to a member of this group (assignee). Press the button “Finish” to process the assignment.

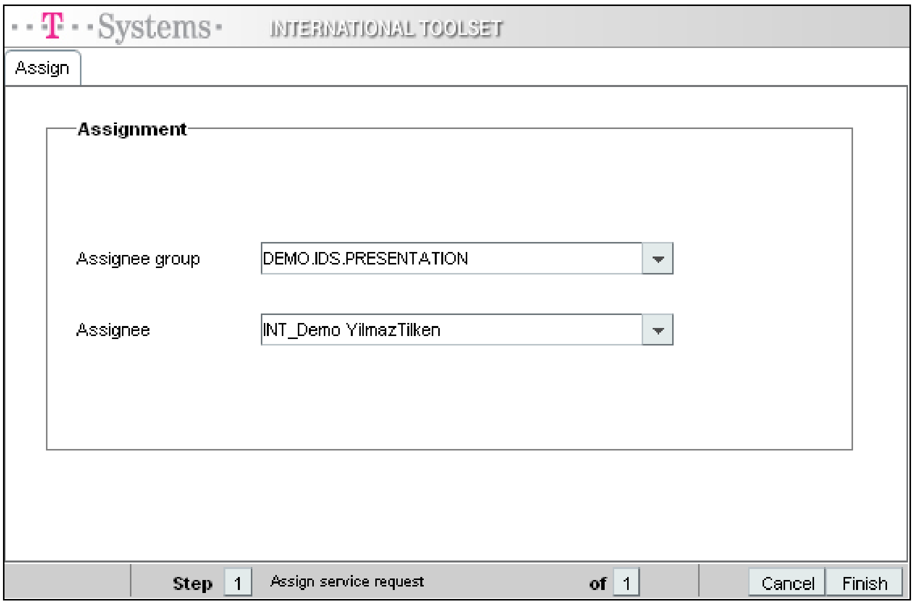


Fig. 28 Service Request Management – Function “Assign service request”

3.2.6 Action: Reject SR

With this link the service request can be rejected. A dialog in a separate window is shown where the rejection must be confirmed. If the rejection is confirmed, a message will be shown and the service request will be sent back to the customer.

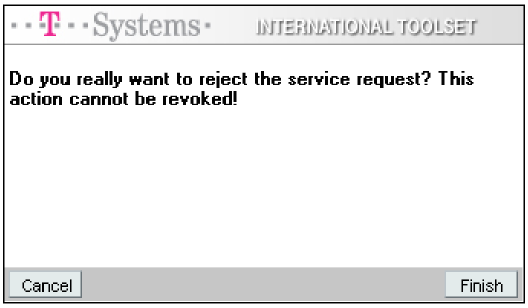


Fig. 29 Service Request Management – Function "Reject service request"

3.2.7 Action: Cancel SR

With this link the service request can be cancelled. A dialog in a separate window is shown where the cancellation must be confirmed. If the cancellation is confirmed, the status of the service request will be changed to "cancelled".

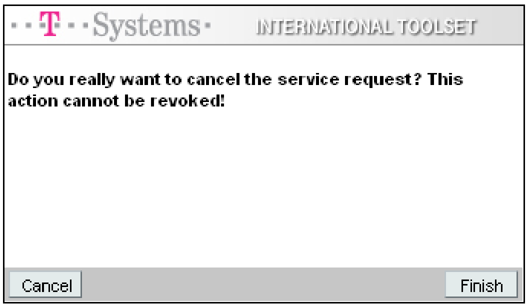


Fig. 30 Service Request Management – Function "Cancel service request"

3.2.8 Action: Create tasks

TODO

The function "Create SR" is displayed in a separate window. In this dialog you can create tasks for a service request.
Two lists are shown:

- A list of service requests. This list includes the service request currently processed and further service requests related to this service request, if available.
- A list of tasks already created for the selected service request.

The following steps must be processed to create the tasks for a service request:

1. Select a service request in the list of service requests.
2. Assign the tasks to an assignee. If no assignee has been selected the tasks will be assigned automatically to the current user.
3. Add optional service elements.
4. At least press the button "Create tasks".

If there are more than one service request repeat the steps 1 – 4.

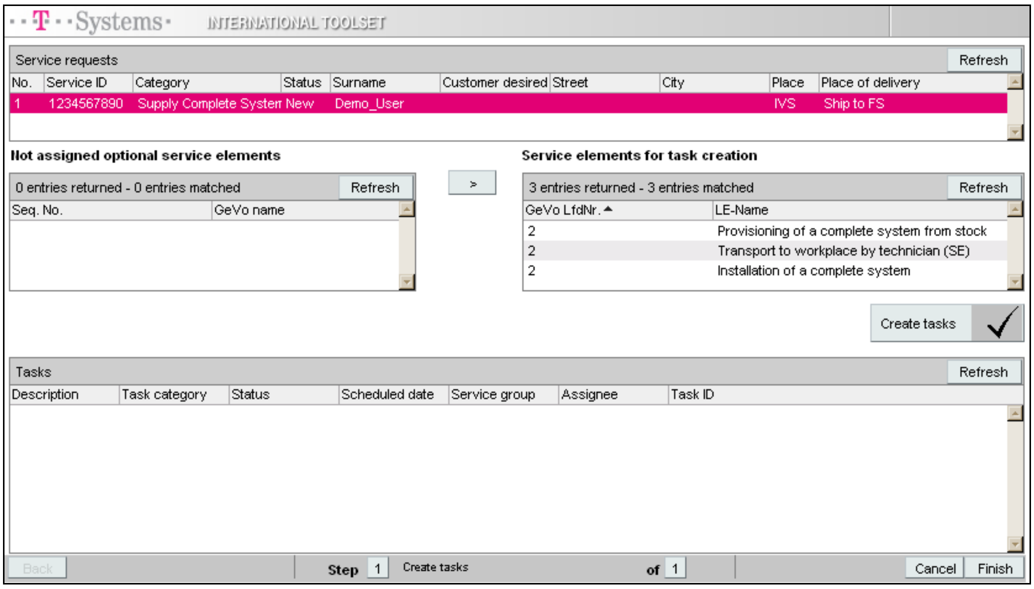


Fig. 31 Service Request Management – Function “Create tasks”

3.2.9 Action: Service request details

In this dialog is additional information about the service request displayed.

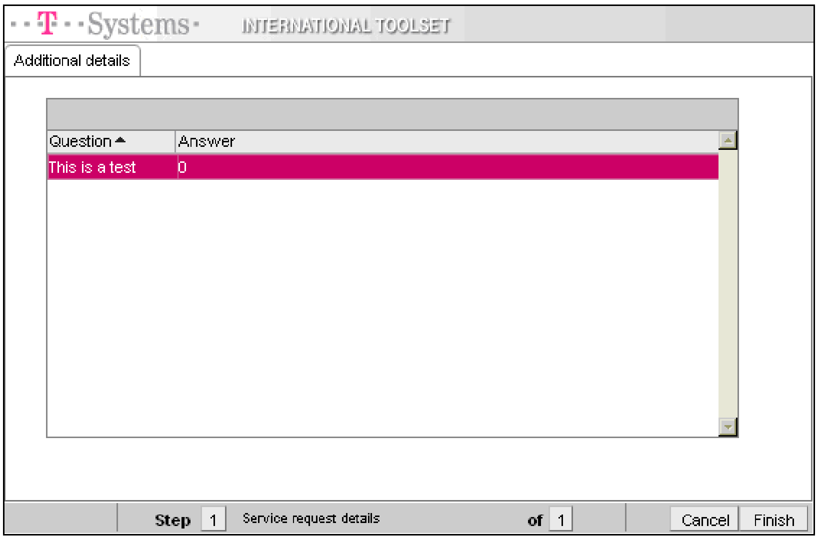


Fig. 32 Service Request Management – Function “Service request details”

3.2.10 Action: Show related tasks

This link displays the module Task Management by using a filter to show the related tasks to the previous selected service request.

3.2.11 Action: Download service requests

The function “Download service request” enables you to get an excel file of some service requests and consists of three steps.
The first step is to define whether you just want service requests that are opened or closed in special period of time or just all of them.

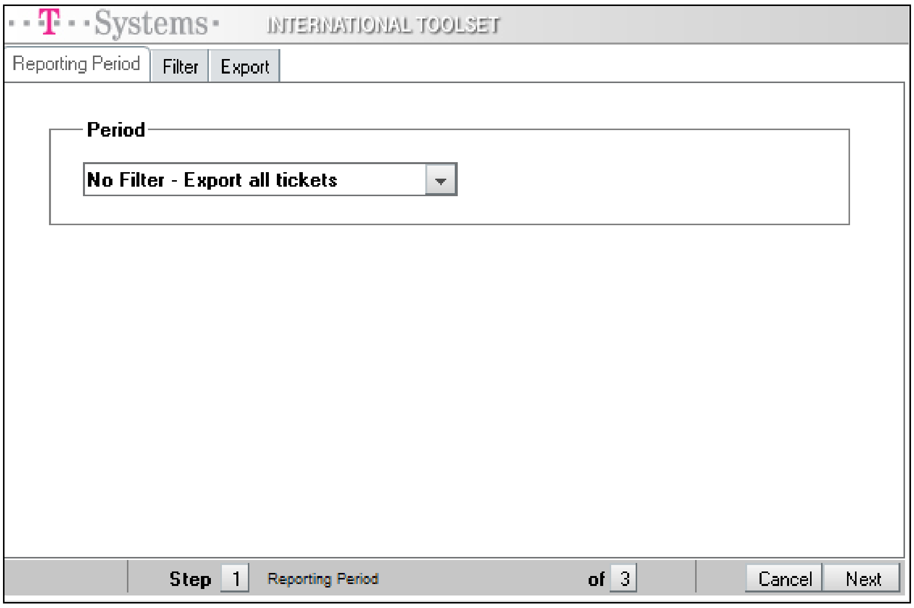


Fig. 33 Service Request Management – Function “Download service requests”

The second step is to define the relevant status and company.

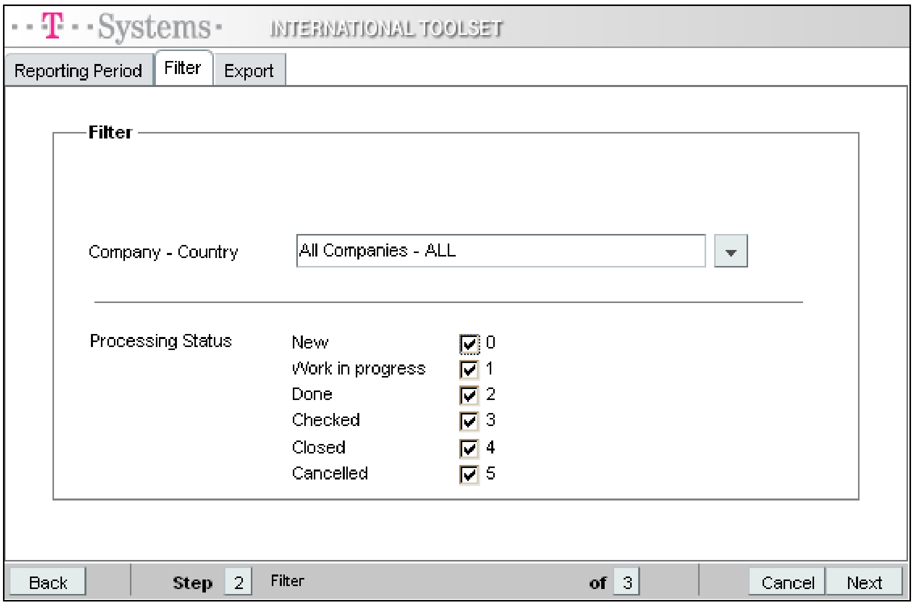


Fig. 34 Service Request Management - Download service request – step 2

The third step is to start the download.

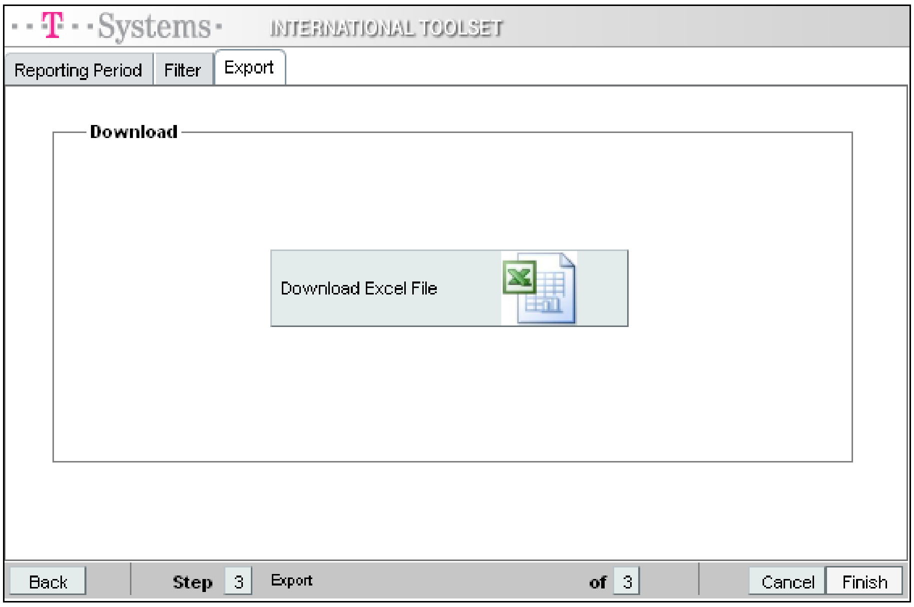


Fig. 35 Service Request Management - Download service request – step 3

When you click on the button *Download Excel File* the file is created and you can save it to disk or open it directly.

3.2.12 Action: Request predefined search

This function should be used to request a new search for the actual application that will afterwards appear in the menu "Search for" on top of the page. You can only request a new search for the application that you are in and therefore have access to.

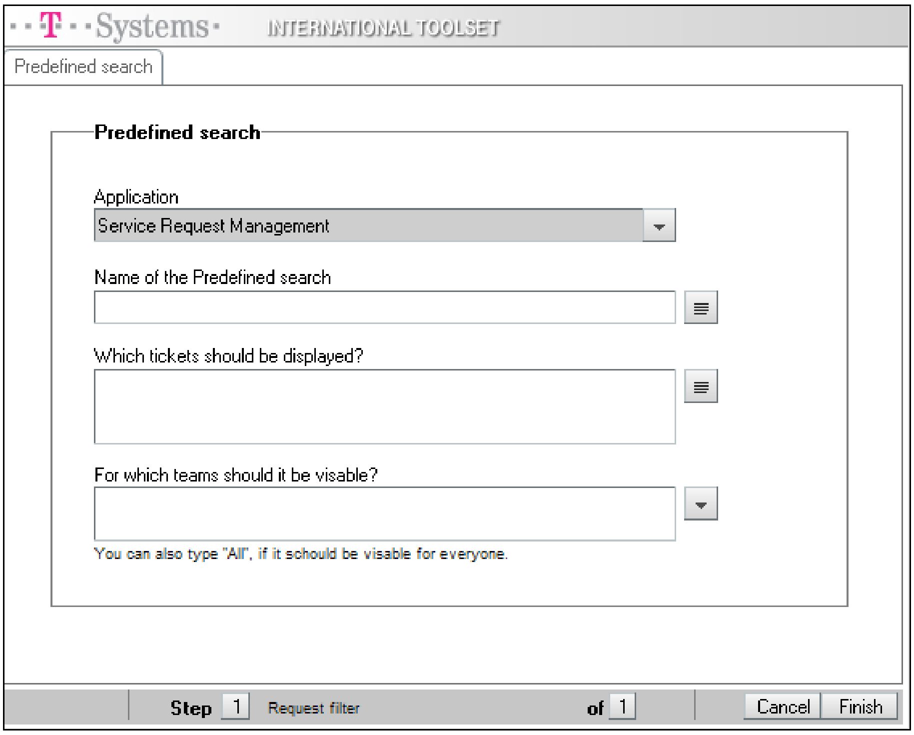


Fig. 36 Service Request Management – Function "Request predefined search"

Fill in all fields and send the request by clicking the *Finish* button. Keep in mind that you should clearly describe what you want to search for and who should be able to use this search.

3.2.13 Action: Print

With this function you can create PDF files by using the displayed templates.

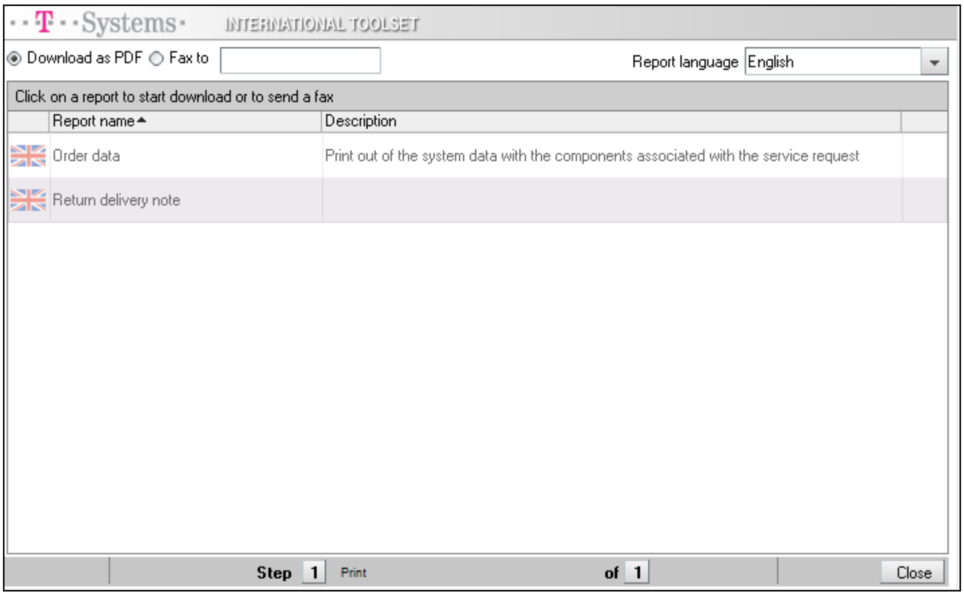


Fig. 37 Service Request Management – Function "Print"

3.2.14 Action: Manage attachments

With the function "Manage Attachments" you can open or add an attachment for the ticket.

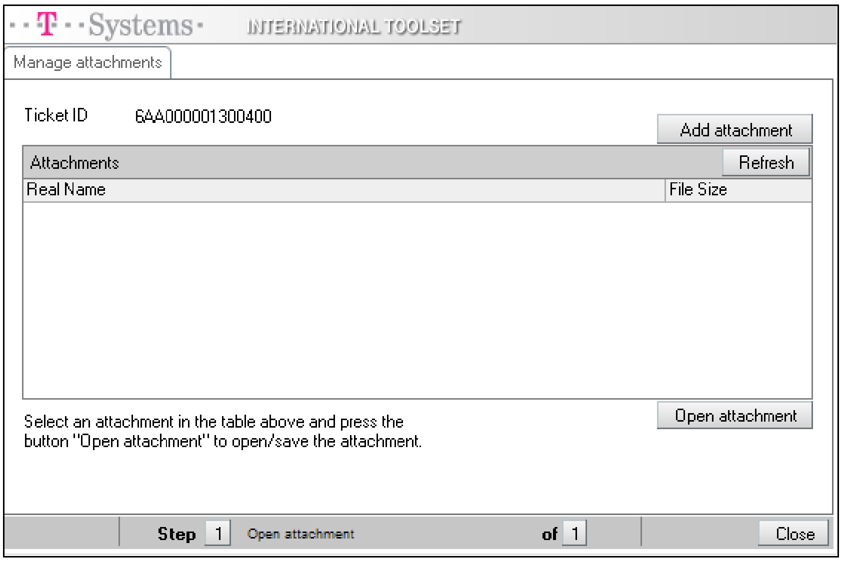


Fig. 38 Service Request Management – Function "Manage attachments"

3.2.15 Action: Manage customer menus

With the function “Manage customer Menus” you can manage the selection menus for attribute values in MyMDS 4 for each company. In “Menu name” are only the attribute menu names listed, which are configured for the company.
If a menu name is selected, the existing entries will be shown in the table below.
To add new values fill the fields “Parameter” and “Label” and press the button *Add*. Changes on a selected entry can be saved by using the button *Save*. To delete a selected entry press the button *Delete*.

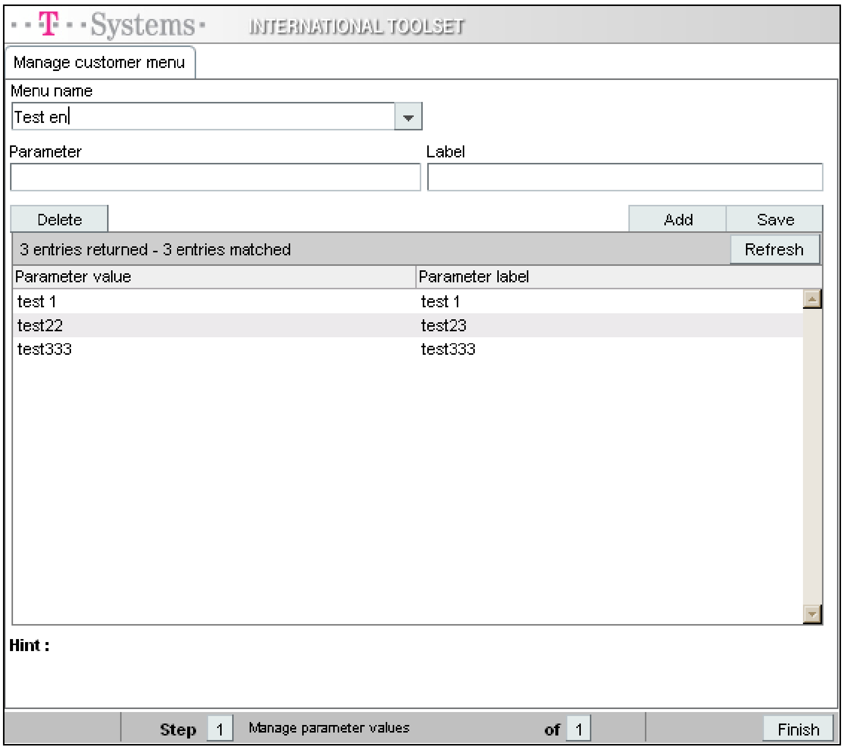


Fig. 39 Service Request Management – Function “Manage customer menus”

3.2.16 Service Request Info Tab Panel

<u>Tab: Service Request</u>

Fig. 40 Service Request Management - SR Info Tab: Service Request

The tab “Service request” shows the contact information, the delivery address of the customer and the category of the selected service request.

Tab: Details

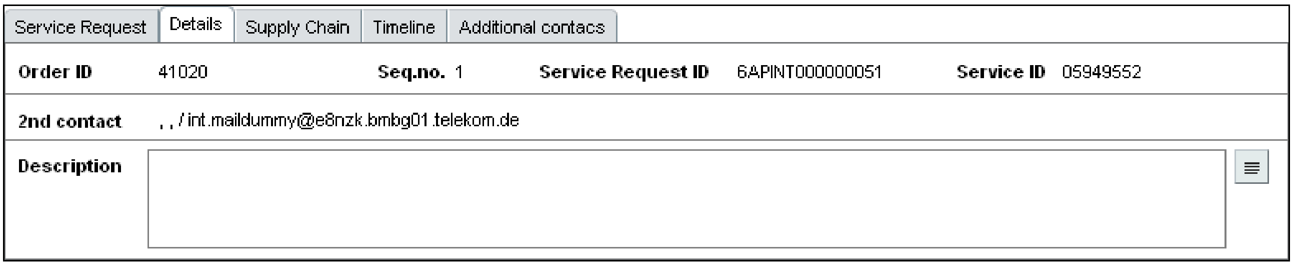


Fig. 41 Service Request Management - SR Info Tab: Details

The tab "Details" shows further details concerning the service request like order ID, 2nd contact and a description of the service request.

Tab: Supply Chain

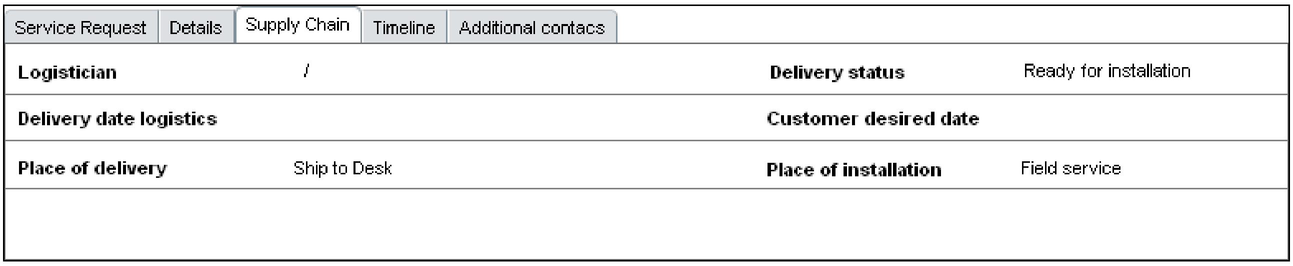


Fig. 42 Service Request Management - SR Info Tab: Supply Chain

The tab "Supply chain" shows delivery information like the name of the logistics service provider (logistician), the delivery date logistics, the place of delivery, the place of installation, the customer desired date and the delivery status.

Tab: Timeline

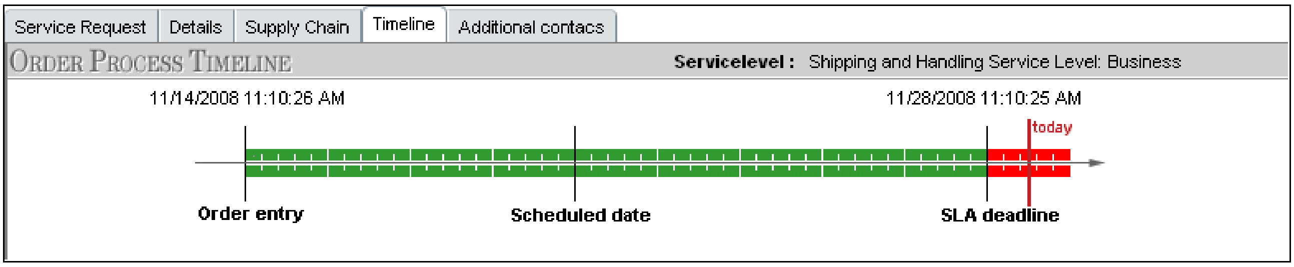


Fig. 43 Service Request Management - SR Info Tab: Timeline

The tab "Timeline" illustrates the time scheduling within the supply chain process for the selected service request.

Tab: Additional contacts

Fig. 44 Service Request Management - SR Info Tap: Additional contacts

The tab “Additional contacts” shows the requester and the contact information of the requester.

3.2.17 Service Request Components Area

Shopping cart

IMAC/D	Component	Status
dispose	Acer ProStation 25...	active
dispose	Elsa Ecomo 750 2...	active
dispose	Citrix Userlizenz	active
unchan...	WinZIP 9 Combo	active
unchan...	MS WIN CAL 200...	active
unchan...	MS Office 2000 Pr...	active

Fig. 45 Service Request Management - SR Components Area

In this area the components related to the service requests are displayed.

3.3 Task Management

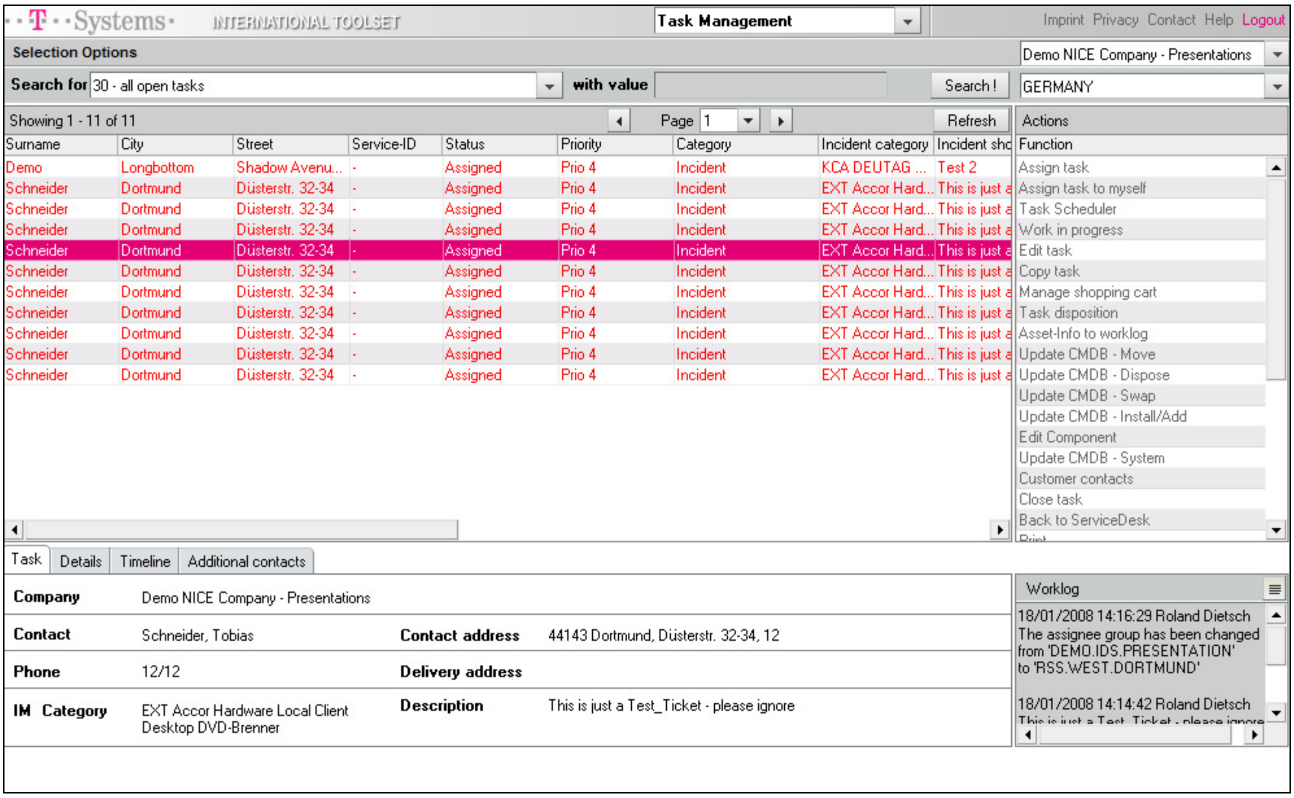


Fig. 46 Task Management Frontend

The Task Management consists of

- the selection option panel (at the top of the page)
- the task overview (in the middle of the page)
- the task action panel (on the right frame of the page)
- the detailed information of the selected task (on the bottom of the page)

A task originates in an incident or a service request and therefore it is created in the incident management or service request management. This means that each task relates either to an incident or to a service request.

In the module Task Management the user can process the task information, i.e. a task can be accepted, copied to another task, edited, cancelled or closed. With the link “Work in progress” the status of the task can be changed to “work in progress”. Furthermore the related CIs can be viewed, the CMDB can be updated (e.g. for a move or disposal), a task can be assigned to group of employees and a member of this group. With the link “Show related service request” the user can skip to the module Service Request Management. There the related service request will be shown in the service request overview.

By default all tasks which can be processed by the user according to his access rights are shown (complying with the filter “all assigned (DEFAULT)”).
While no task is selected in the task overview the task action panel in the right frame and the task detail panel on the bottom of the page are empty.

Selection Options Panel

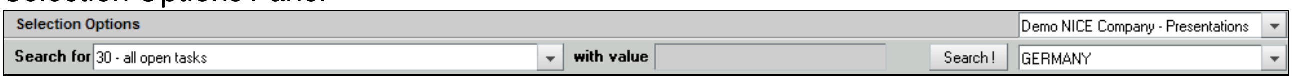


Fig. 47 Task Management Frontend - Selection Options Panel

You can reduce the number of tasks displayed in the task overview by using pre-defined filters. A filter consists of the filter name (“search for”) and a value (“with value”) as an additional search criterion, if necessary. If no additional value is required for the filter the field “with value” is write-protected.

<u>Search for</u>
Here you can select a pre-defined filter to reduce the number of tasks. Only those tasks will be displayed who match the criteria.

<u>With value</u>
In this field additional search criteria must be entered if required by the filter definition.

Filter Examples:

- **10 - my open tasks:** Shows all tasks which can be processed by the user according to the user’s rights.
- **Search for Tasks of Company in Field "with value":** Shows all tasks related to a special company. This filter requires a value i.e. in this case the name of a company.

Tasks Overview

Showing 37 - 54 of 138 — Page 3 — Refresh

Surname	City	Street	Service-ID	Status	Priority	Category	Incident category	Incident sho
Demo_User	Undervillage	Mainstreet 1	05949546	Assigned		Installation of a complet		
Demo_User	Bamberg	Wilhelmsplatz 3	05949548	Done		Installation of a complet		
Demo_User	Bamberg	Wilhelmsplatz 3	05949549	Done		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949550	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949552	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949553	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949554	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949555	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949556	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949557	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949558	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949559	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949560	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949561	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949562	Assigned		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949564	Done		Installation of a complet		
Demo_User	Undervillage	Mainstreet 1	05949566	Assigned		Installation of a complet		

Fig. 48 Task Management - Tasks Overview

The task list can be sorted by column. Just click on the surname for example and the list will be sorted after surnames.
To refresh the panel click on the button *Refresh*.
With the arrow keys you can skip from one page to another.
Selecting a task will highlight the related row in magenta.

Task Actions Panel

Actions
Function
Assign task
Assign task to remote
Assign task to myself
Task Scheduler
Work in progress
Edit task
Copy task
Manage shopping cart
Logistic coordination
Task disposition
Asset-Info to worklog
Update CMDB - Move
Update CMDB - Dispose
Update CMDB - Swap
Update CMDB - Install/Add
Update CMDB - System
Edit component
Customer contacts
Close task
Cancel task
Back to ServiceDesk
Print
Download tasks
Manage attachments
Manage related system
Search for system/component
Service request details
Show related incident
Show related service request
Show related system
Edit installation parameter
Subsequent delivery
Request predefined search
New contact
Manage contacts
Send message
Reopen task
Show history
Suspend ticket
Show activities
Inventory viewer
Edit component attributes
Manage advanced filter search

Fig. 49 Task Management - Task Actions Panel

In the task panel a list of functions for the processing of the selected task is displayed. The number of functions shown in the task panel depends on several criteria like the status of the order, the role concept and the resultant access rights assigned to the user.

3.3.1 Action: Assign task

The function "Assign task" is displayed in a separate window. It consists of the following steps:

- Update times
- Update worklog
- Assign

Update times:	Actual times needed to solve the problem.
Update worklog:	A new entry for the worklog can be entered. The worklogs contains the description of the work that has been done.
Assign:	The task can be assigned to another group of employees and to a member of this group. In this case the status of the task will be changed to "assigned".

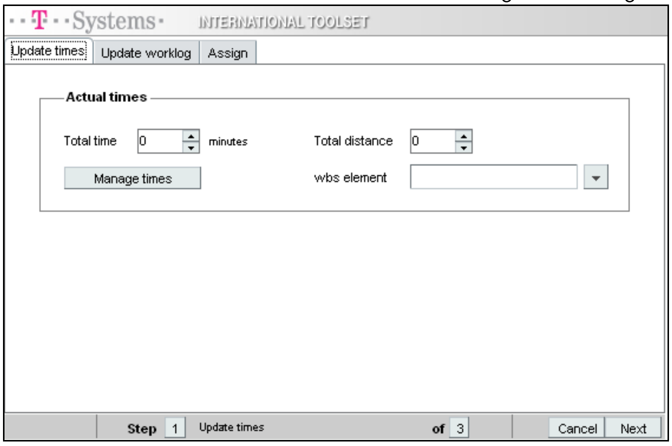


Fig. 50 Task Management – Function "Assign task"

3.3.2 Action: Assign task to remote

The function "Assign task to remote" is displayed in a separate window. It consists of the following steps:

Cause of delay:	This tab will only be displayed, if the SLA deadline has expired. In this case a value in the field "Cause of delay" is required.
Update times:	Actual times needed to work on the problem.
Cause code:	Incidents can be easily completed with predefined texts and closed by using "cause codes". After input of a "Best Guide" ID, the work log and the closure category will be automatically be filled.
Update worklog:	A new entry for the worklog can be entered. The worklogs contains the description of the work that has been done.
Closure category:	Known errors can be documented related to the task.
Assign:	The task can be assigned to another group of employees and to a member of this group. In this case the status of the task will be changed to "assigned".
Close:	Set optional close timestamp. If timestamp is not set the current timestamp will be used.

This function is used to assign incident tasks to remote groups (Cosima, ARSIM).

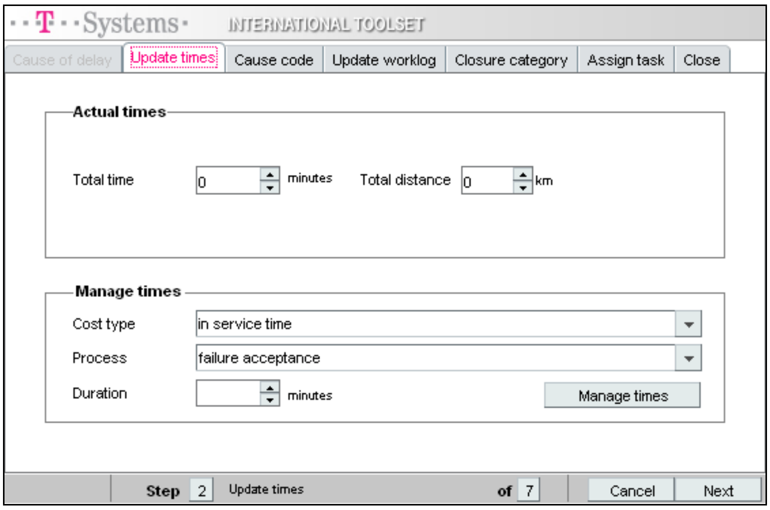


Fig. 51 Task Management – Function "Assign task to remote"

3.3.3 Action: Assign to myself

The function "Assign to myself" sets the current logged in user as assignee of the selected ticket. The assignee group will only change, if the current user is not member of the current assignee group. If the user is only member of one team, this team will be set automatically. In other case the user will get the following dialog to select the assignee group.

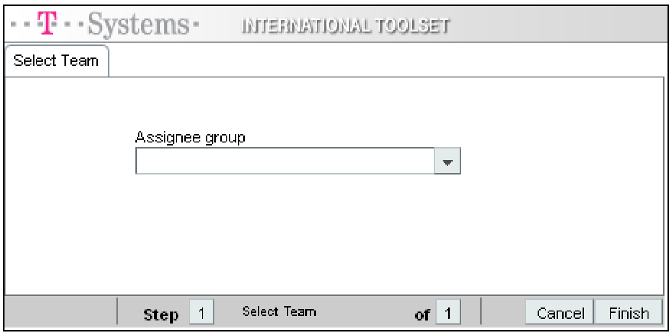


Fig. 52 Task Management – Function "Assign to myself" selection of own team

3.3.4 Action: Task Scheduler

This function enables the user to assign more than one task at a time to another assignee. Additionally you can select the date and time when the tasks have to be finished. The days where the selected person is absent are displayed hatched in the table. The sum of duration of all assigned tasks of this day is displayed beside the number of tasks assigned.

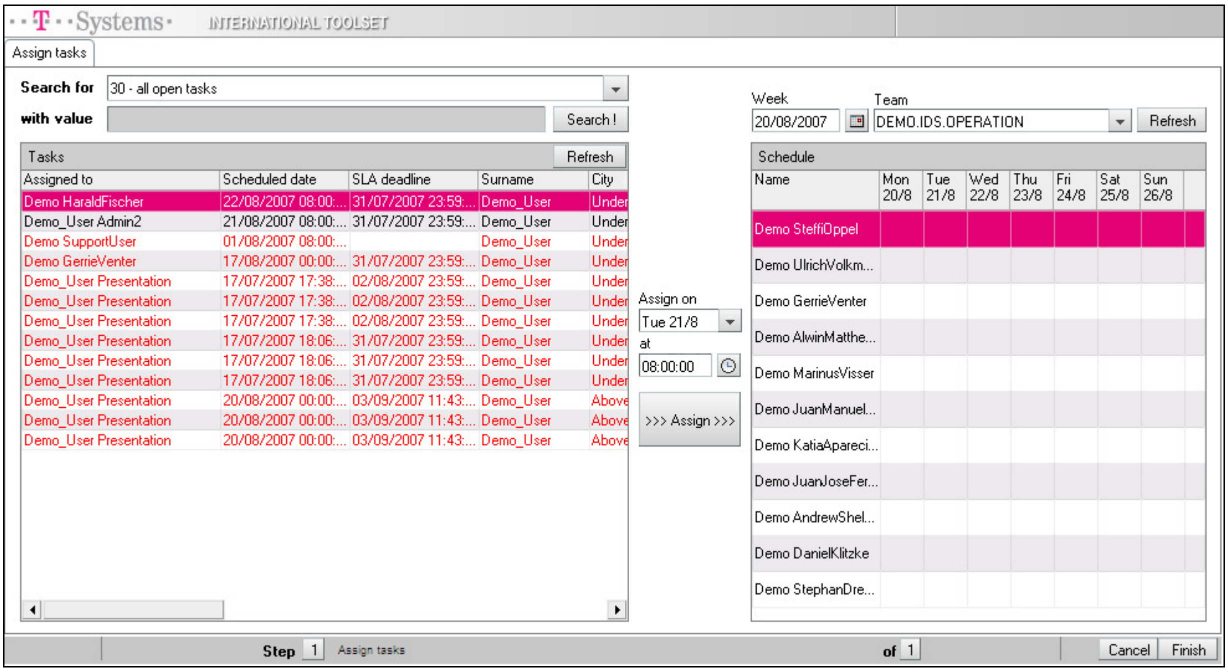


Fig. 53 Task Management - Function "Task Scheduler"

The values in the field "Team" depend on the company coming from the selected task. If you have more than one task selected, the first one determines the values.
During the assignment of multiple tasks, the workflow determines tickets that break the rules of the configured assignment for the company in this assignment process and gives you a list of the message displayed on the screen.
To assign tasks, go through the following steps:

- First of all you have to select the tasks you want to assign. For this purpose you use the "Search for"-menu that you know from all consoles.
- Then you select the team and the first of 7 days to determine the date and time for the tasks.
- When you click on the button *use selected values*, the members of the team and the 7 days appear in the table "Users of the selected team".
- Then you select as much tasks as you want to assign to the same person on the same day at the same time.
- After you selected the day ant the time, you click on the button *>>> Assign >>>*.
- The number of tasks that have successfully been assigned appear in the line of the selected team member and in the column of the selected day you chose.

The assignment takes place every time you click on the button *>>> Assign >>>*.
The *Finish* button only closes the dialog.

3.3.5 Action: Work in progress

A click on the link will change the status of the task to "Work in progress".

3.3.6 Action: Edit task

The function "Edit task" is displayed in a separate window. It consists of the following steps:

- Cause code (only for IM tasks)
- Update worklog
- Questions / Answers

- Closure category (only for IM tasks)
- Cause of delay
- Update times
- Charging method
- Update Service ID (only for IM tasks)
- Update priority (only for IM tasks)

Cause code:	Incidents can be easily completed with predefined texts and closed by using “cause codes”. After input of a “Best Guide” ID, the work log and the closure category will be automatically be filled.
Update worklog:	A new entry for the worklog can be added. The worklog contains the description of the work that has been processed.
Questions / Answers:	Questions concerning the task can be added. For each question an answer can be selected from the menu.
Closure category:	Known errors can be documented related to the task. The field “incident history” shows the errors that have been detected in the past (read-only field).
Cause of delay:	This tab will only be displayed, if the SLA deadline has expired. In this case a value in the field “Cause of delay” is required.
Update times:	Actual times needed to solve the problem.
Charging method:	You can choose between monthly flatrate and effort as charging method.
Update Service ID:	For an incident ticket the related Service ID can be changed subsequently.
Update priority:	You can change the priority of the task from a menu.

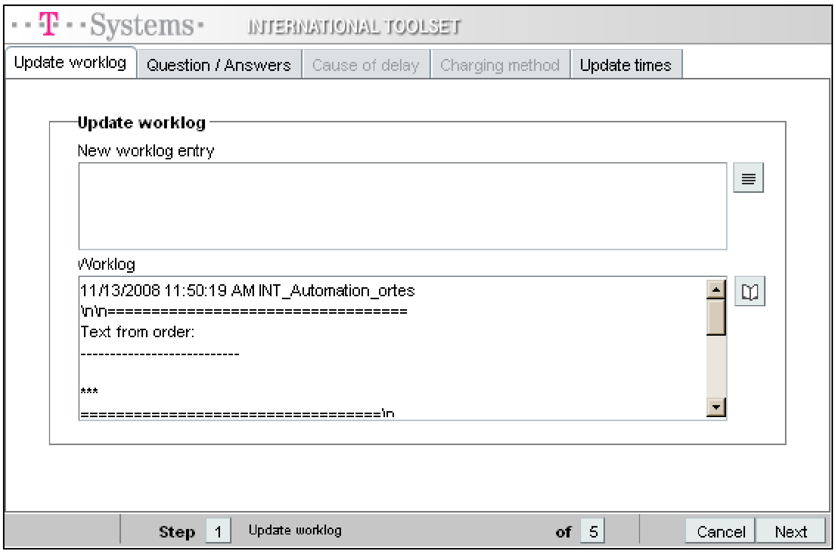


Fig. 54 Task Management – Function “Edit task” (OM version)

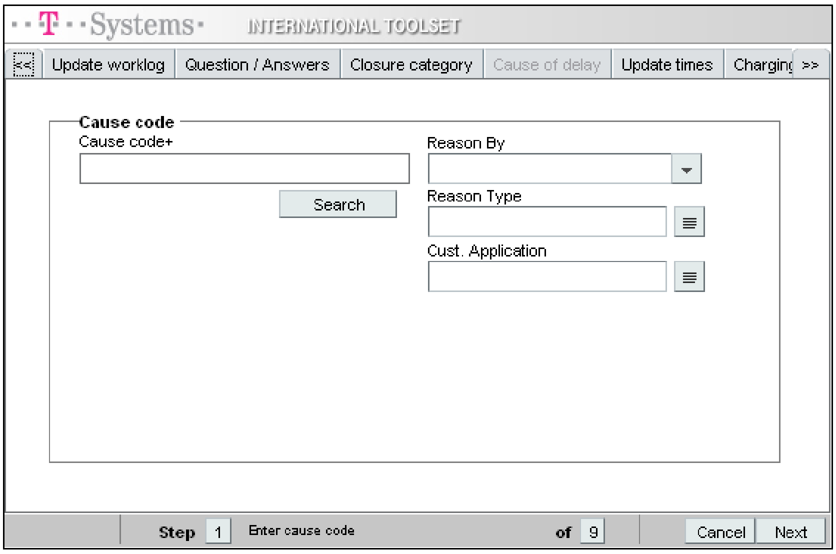


Fig. 55 Task Management – Function "Edit task" (IM version)

3.3.7 Action: Copy task

The function "Copy task" is displayed in a separate window. It consists of the following steps:

- Delay cause source task
- Update times source task
- Cause code source task (only for IM tasks)
- Update worklog source task
- Closure category source task (only for IM tasks)
- Assign task copy
- Close source task

In this dialog a new copy of an existing task (source task) can be created in order to assign the copied task to another employee and to close the source task. This function can be used for example if the task is to be followed up by another employee.
At first with the steps "Delay cause", "Update times", "Update worklog" and "Update worklog" the source task can be changed. A data entry in the functions "Update times", "Update worklog" is required for closing the source task. In the step "Assign copy" the source task can be assigned to another group and to a member of this group. Finally the source task can be closed in the step "Close parent task", if required.

Cause of delay:	This tab will only be displayed if the SLA deadline has expired. In this case a value in the field "Cause of delay" is required.
Update times:	Actual times needed to solve the problem.
Cause code:	Incidents can be easily completed with predefined texts and closed by using "cause codes". After input of a "Best Guide" ID, the work log and the closure category will be automatically be filled.
Update worklog:	A new entry for the worklog can be added. The worklog contains the description of the work that has been processed.
Closure category:	Known errors can be documented related to the task. The field "incident history" shows the errors that have been detected in the past (read-only field).
Assign copy:	The copy of the task can be assigned to another group and to a member of this group. By default the field "assignee group" is pre-defined with the related group of the current user and the field "assignee" is pre-defined with the userid of the current user. If the default values will be left unchanged the status of the copied task will be set to "new". However, if the task is assigned to another group/employee the copied task will be set to "assigned".

Close parent task: If required, the source task can be closed using the check button *close parent task: yes*. In this case the status of the source task will be changed to "closed". If you copy an incident task, the parent task will be closed. If no "Task finished" date is set, the current timestamp is set by the system. The "Task finished" date has to set be after create date of the source task and within a time interval which is set for the company. (Default interval : today 00:00:00 – today current time)

With the button *finish* the changed data in the source task will be saved and a new copy of the source task will be created.

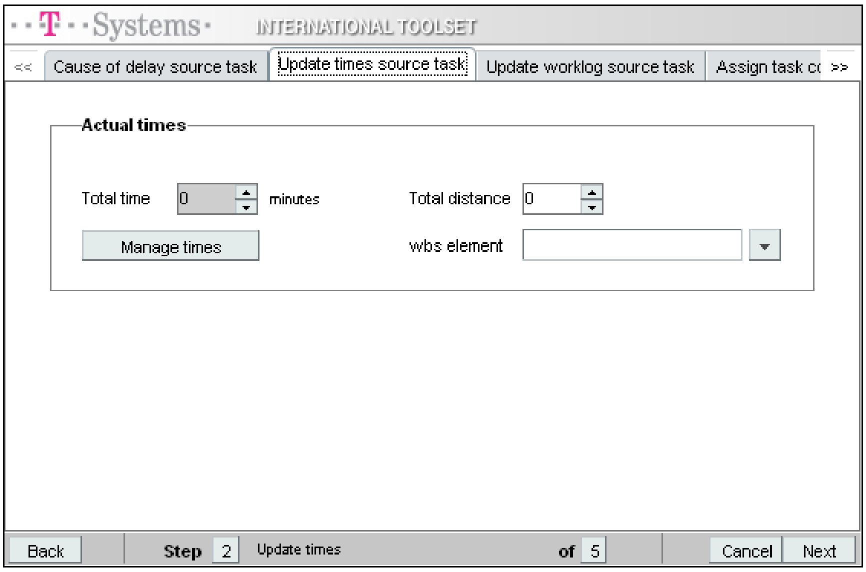


Fig. 56 Task Management – Function "Copy task" (OM version)

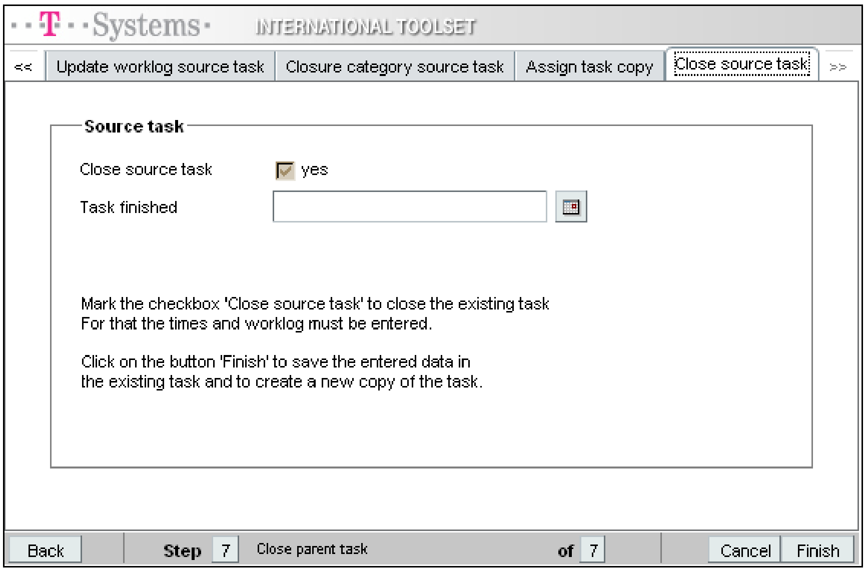


Fig. 57 Task Management – Function "Copy task" (IM version)

3.3.8 Action: Manage shopping cart

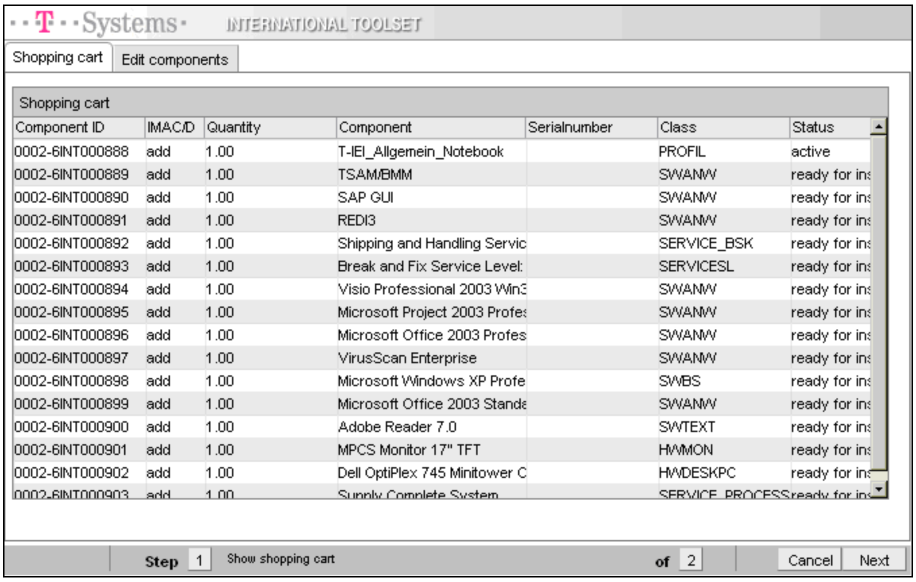


Fig. 58 Task Management - Function “Manage shopping cart” – components

On the second page the attributes of the system(Service ID) are displayed. A selected attribute is displayed in the lower part of the dialog dependent on its configuration:

- name of attribute
- value of attribute

optional:

- additional buttons to support input (calendar, menu, ...)

If the attribute is changeable, the *Save value* button is displayed. After saving the new value is displayed in the table.

There are also some special attributes with complex data types. In this case in the lower part of the dialog a web form is displayed with the content of the selected attribute. If the attribute is changeable the changes will be done by using the displayed web form.

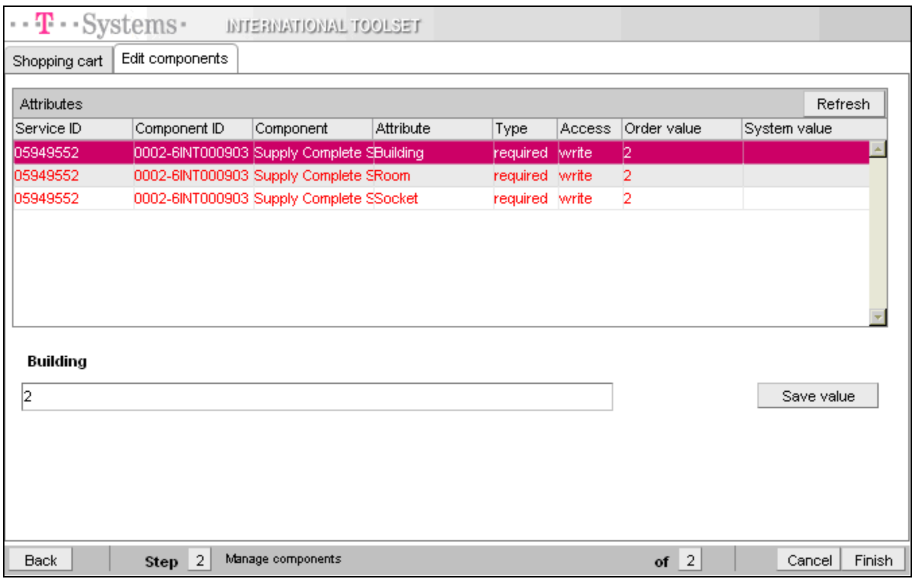


Fig. 59 Task Management - Function “Manage shopping cart” – component attributes

3.3.9 Action: Logistics coordination

The function “Logistics coordination” is displayed in a separate window. In this dialog the dispatcher can schedule the date for the arrival of goods and define the delivery type. In the case a logistics management system (e.g. SAP) is used the date for the arrival of goods will be transferred automatically to the logistics provider (e.g. DHL). Otherwise this date is used for the information of the field service.
The planned date for the installation or for the acceptance at the customer can be changed as well.
Additionally the delivery address is displayed. The delivery address may be the location of the customer or of the field service.

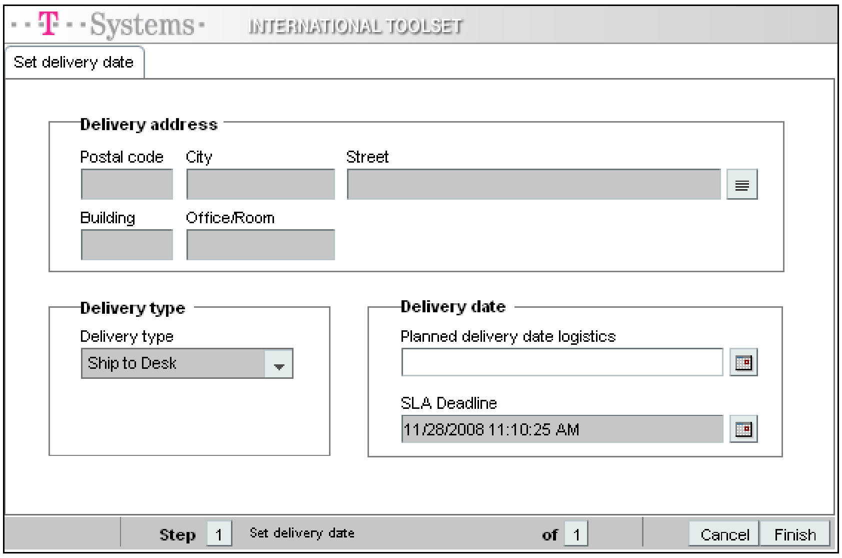


Fig. 60 Task Management – Function “Logistics coordination”

3.3.10 Action: Task disposition

The function “Task disposition” is displayed in a separate window. In this dialog the dispatcher can define the disposition date and assign the task to a group of employees and to a member of this group. The SLA deadline and OLA deadline are displayed to facilitate disposition.
If the task is assigned the status of the task will be changed to “assigned”.

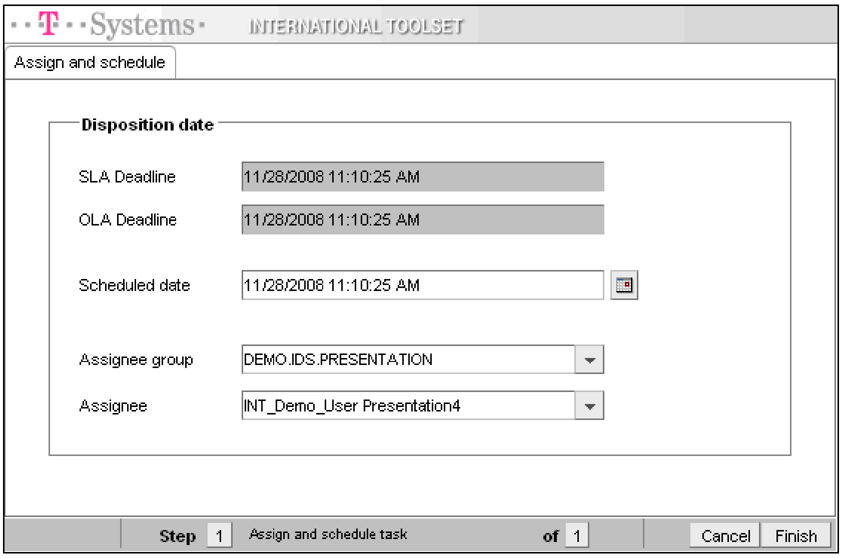


Fig. 61 Task Management – Function "Task disposition"

3.3.11 Action: Assetinfo to worklog:

A click on the link adds the system information including components to the task worklog.

3.3.12 Action: Update CMDB – Move

The function "CMDB - Move" is displayed in a separate window. This dialog is used to manage the move from one customer location to another.

The following information is displayed:

- a list of the affected IT systems
- a list of configuration items associated to the selected IT systems
- the address data of the current customer location
- the address data of the new customer location
- further details like distance in km, working hours, notes, execution date

Processing the move:
To process the move select the IT system that will be affected by the move. Then press the button *Execute move*. Press the button *Move failed* ... if the move could not be executed.

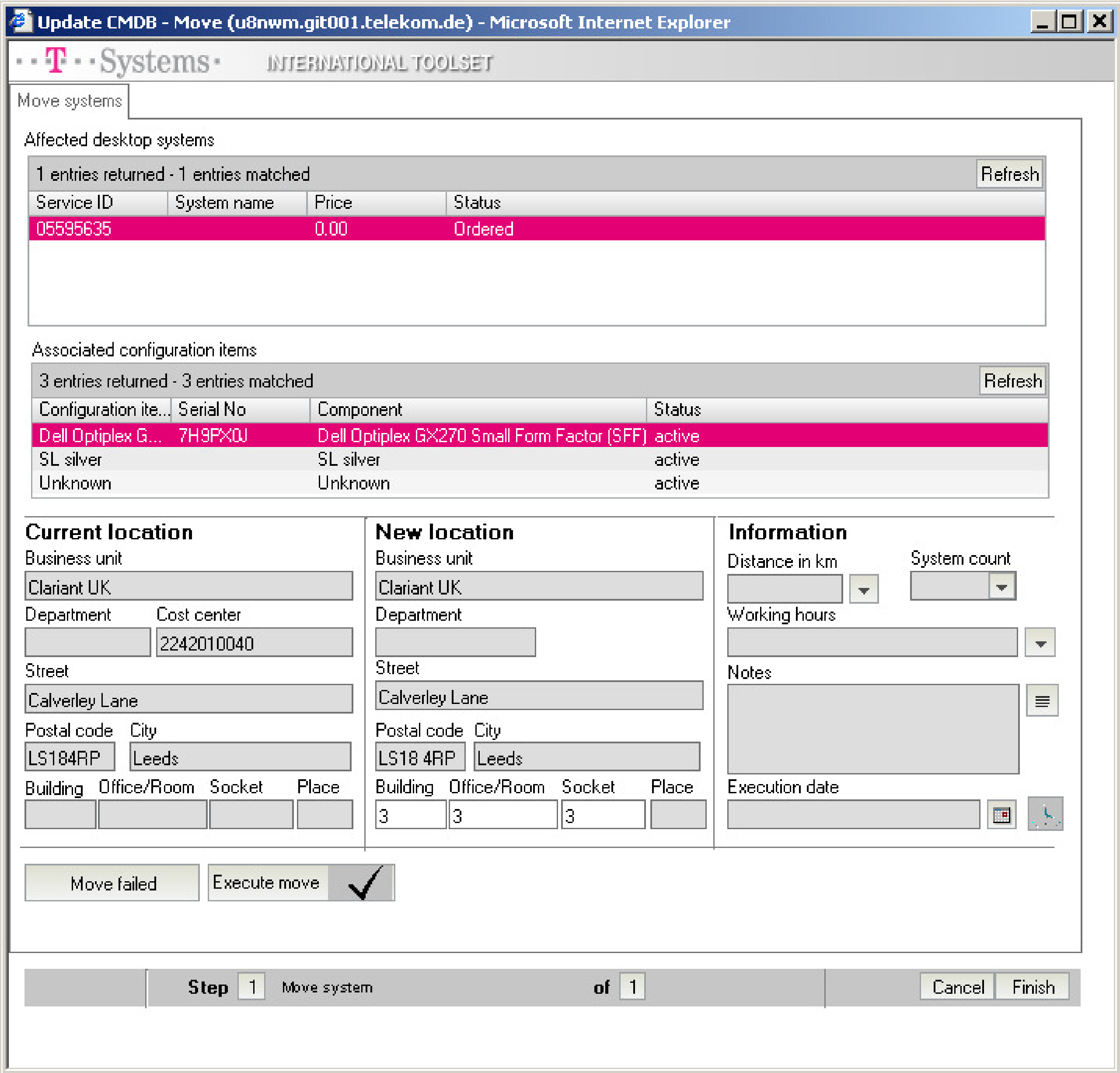


Fig. 62 Task Management – Function "Update CMDB - Move"

3.3.13 Action: Update CMDB – Dispose

The function "Update CMDB - Dispose" is displayed in a separate window. In this dialog the disposal of the IT system can be processed.

It consists of the following steps:

- Location / Contact / Date
- Deactivation

Location / Contact / Date: Address data of the intermediate storage facility where the IT system is stored temporarily until it will be disposed, the contact information for the logistician, return date for the disposal, the pick-up date for the collection of the IT system that will be disposed.

Deactivation: The following lists are shown:

- List of components related to the IT system that are to be deactivated ("components for deactivation")
- List of deactivated components
- List of components related to the customer (asset)

For the deactivation select the components that are to be deactivated in the list "components for deactivation" and press the button with the "single arrow". Use the button with the "twin-arrows" to move one ore more components from one list to the other in one step.

For the deactivation of the software components related to the IT system press *Deactivate all SW*.

For components that have been lost press the button *Loss reported*.

Click on the button *finish* to process the disposal.

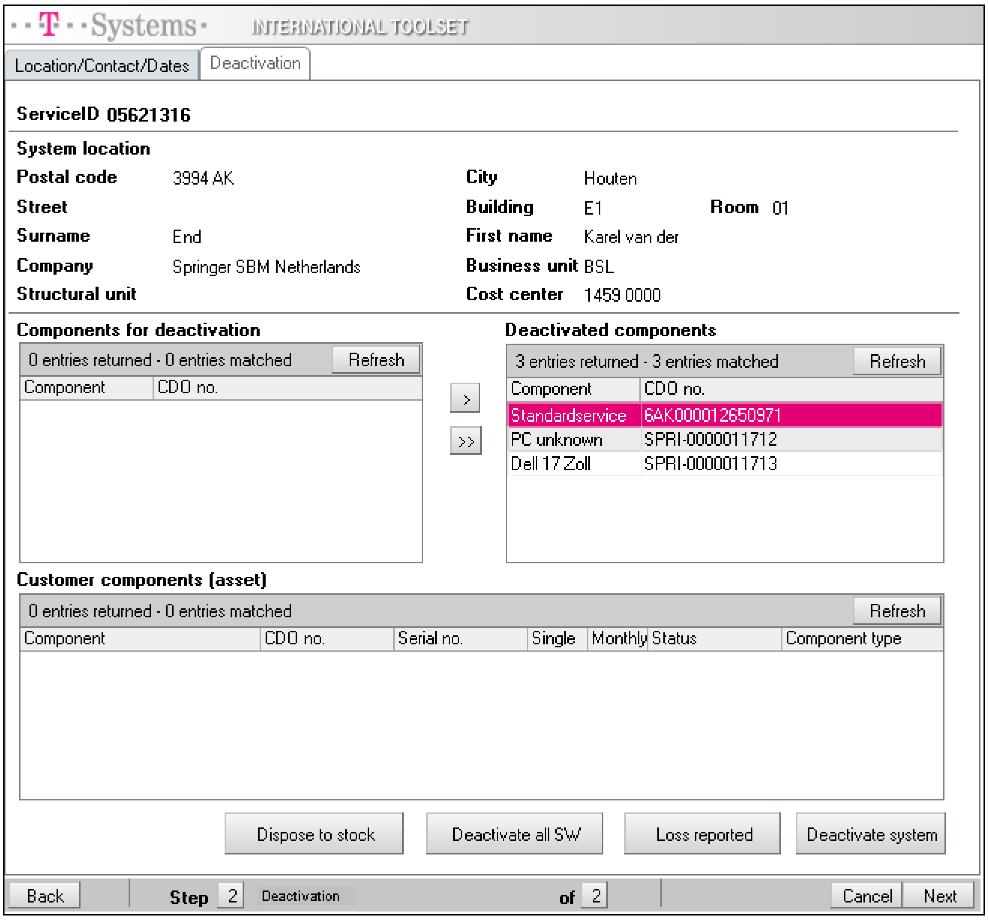


Fig. 63 Task Management – Function "Update CMDB - Dispose"

In order to dispose the components to a stock instead of deactivating them, use the button *Dispose to stock*. Then the following dialog appears.

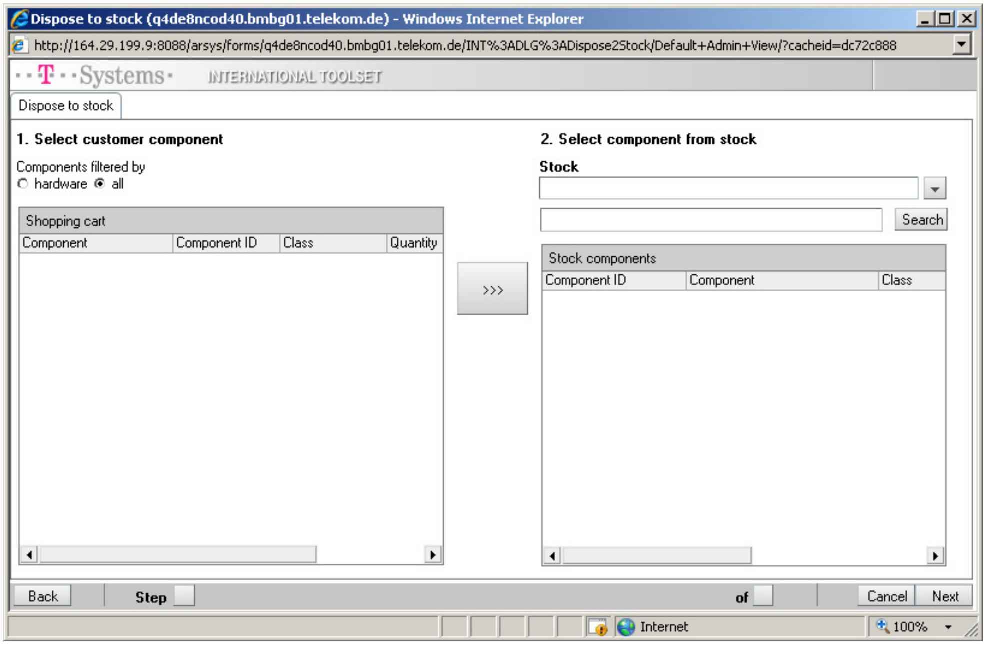


Fig. 64 Task Management – Function "Update CMDB – Dispose, Dispose to stock"

3.3.14 Action: Update CMDB – Swap

The function "Update CMDB - Swap" is displayed in a separate window. In this dialog components of the IT system can be exchanged for stock components (spare part exchange).

Two lists are shown:

- a list of components related to an IT system
- a list of components in the selected stock available for the component of the IT system that is to be exchanged
- a list of available stocks at the current location

To exchange a component of an IT system select the component that has to be exchanged in the list "IT system components" and the required stock in the "stock list". The components available in the current stock will be displayed in the list "stock components".

Searching for component:
You can also search for a component by the CI ID, customer CI number or serial number in a stock. For this select a store from the "stock list" and enter a CI ID, customer CI number or serial number. Press *enter*. The required component will be shown in the list "stock components", if available.

Processing the spare part exchange:
Click on the button *Change parts* to process the spare part exchange.
Two kinds of processes can be initiated:

1. According to stock configuration a fault report must be created: The fault report is shown in a separate window. Complete the form and press the button *Print*. The form "Incident" will be displayed in a separate window and can be printed out via the print function of the browser.
   In the dialog "Update CMDB - Swap" the component in the list "IT system components" will be replaced by the new component from the stock. The "stock list" will be updated too: the component that has been taken from the stock will be removed.

2. No fault report must be generated. In the dialog “Update CMDB - Swap” the component in the list “IT system components” will be replaced by the new component from the stock. The “stock list” will be updated too: the component that has been taken from the stock will be removed.

The re-exchange of a repaired element to the customer is also possible. The lent device is then transferred from the customer inventory to the stock (with status: active). In order to do this, you have to uncheck the field *component defect*.

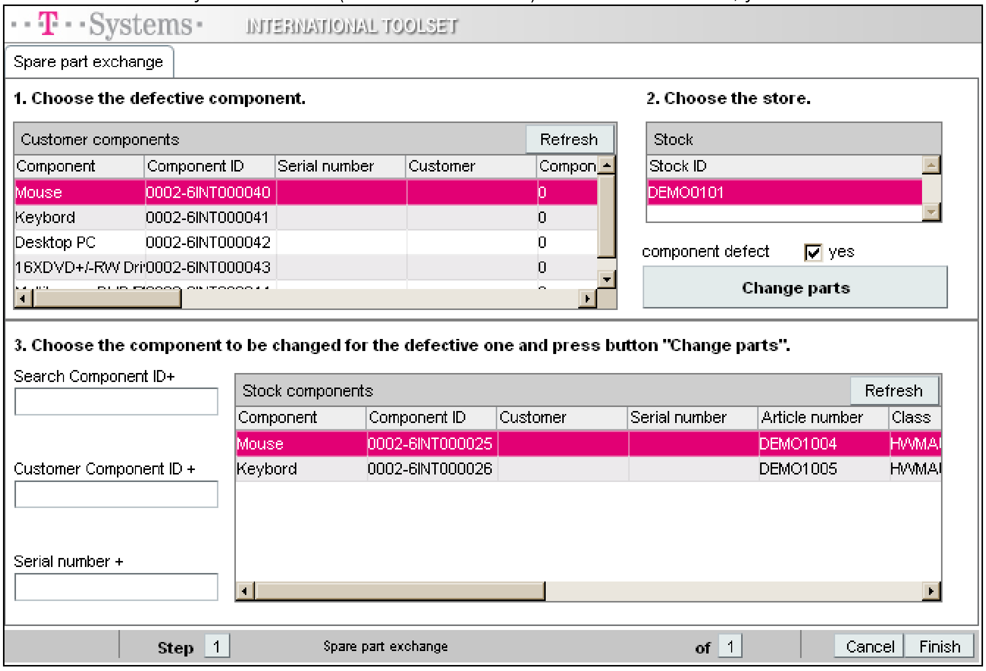


Fig. 65 Task Management – Function “Update CMDB - Swap”

3.3.15 Action: Update CMDB – Install/Add

The function “Update CMDB – Install/Add” is displayed in a separate window.

Update of CMDB:

The following lists are shown:

- a list of delivered components without logistics
- a list of delivered components with logistics
- a list of activated components (asset)

With the arrow buttons components can be moved from the list with the delivered components to the list with the activated components. The buttons with “twin-arrows” can be used to move multiple components from one list on the left to the list on the right (the small buttons with “twin-arrows”) or from both lists on the left to the list on the right (the large buttons with “twin-arrows” in the middle).
Click on the button “Info” to show the license information for the selected component (only for components with license liability). The information will be displayed in a new dialog.

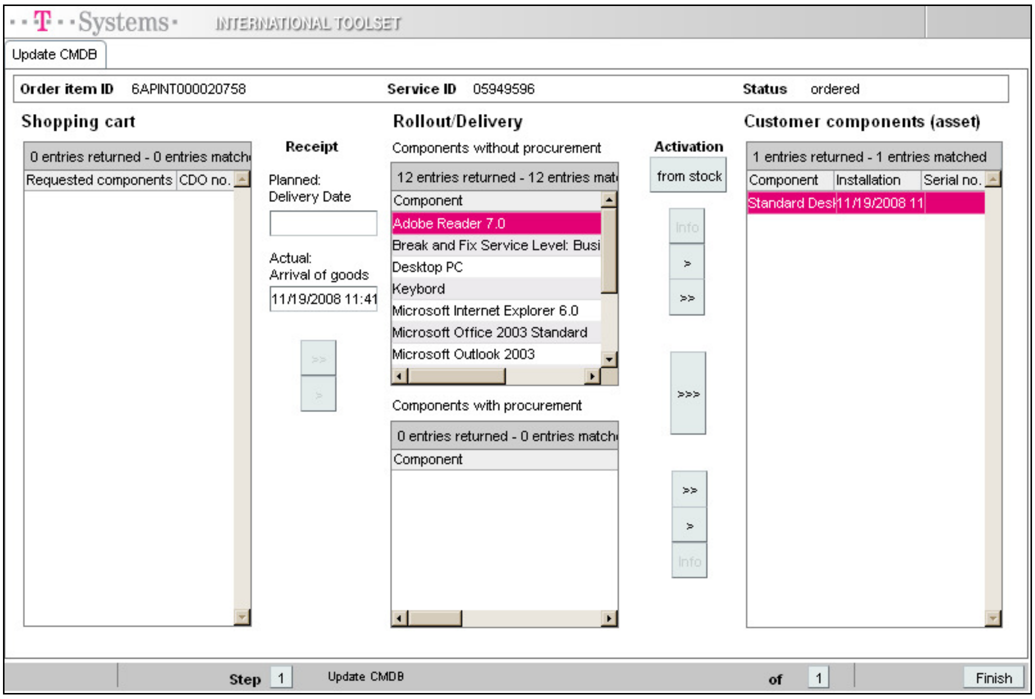


Fig. 66 Task Management – Function “Update CMDB – Install/Add”

Additional product specific information given by the customer in the order portal can now be accessed by the backend agent.

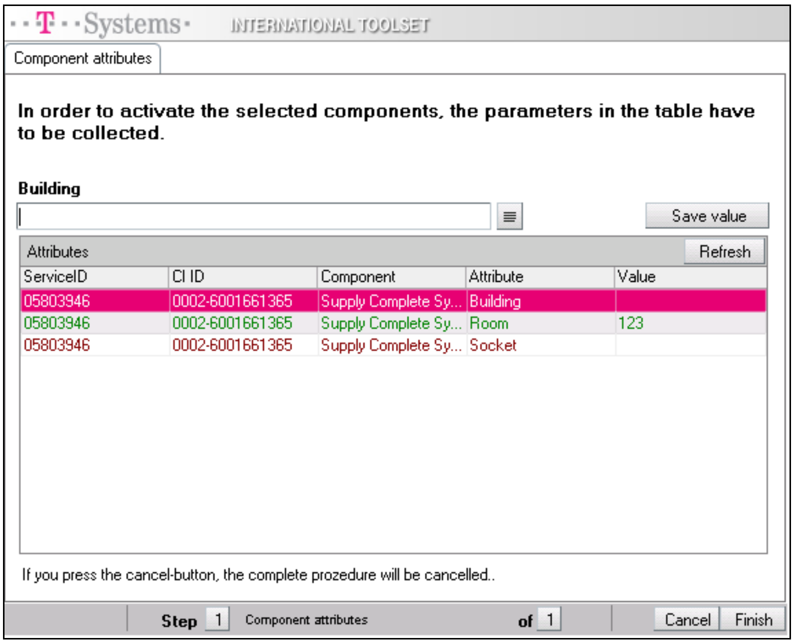


Fig. 67 Task Management – Function “Update CMDB – Install/Add” – component attributes

Within a customer order assets can be directly taken from the webSRM stock and then being activated for the order. With the button “from stock” a new dialog will be opened where you can choose a stock. After that you can move the selected elements from the stock to the shopping cart as long as the class of the component matches between stock and shopping cart. This has to be additionally configured for this company.

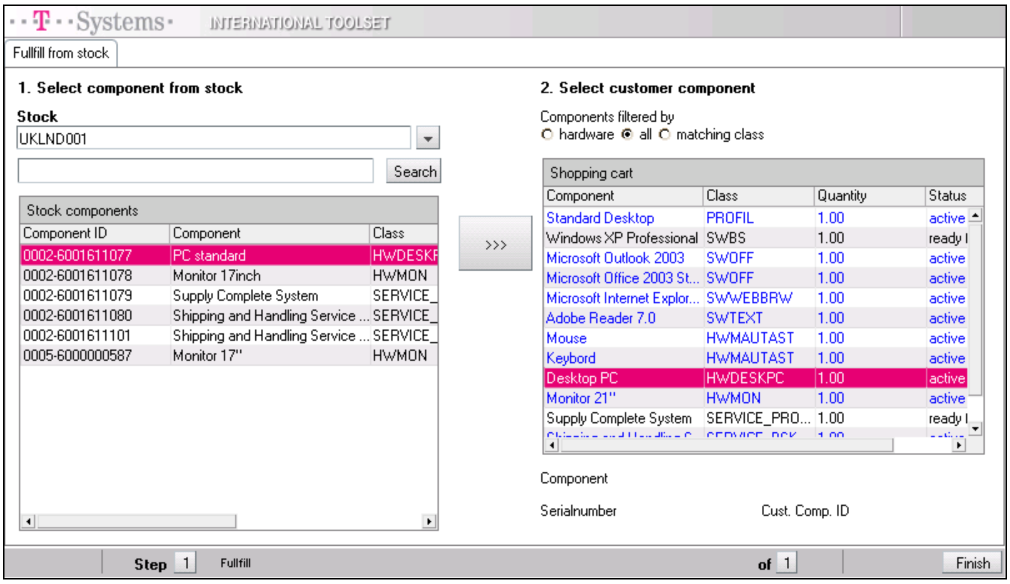


Fig. 68 Task Management – Function “Update CMDB – Install/Add” – fulfillment from stock

If the shopping cart component got attributes the following dialog is opened to move the attribute values to the stock component:

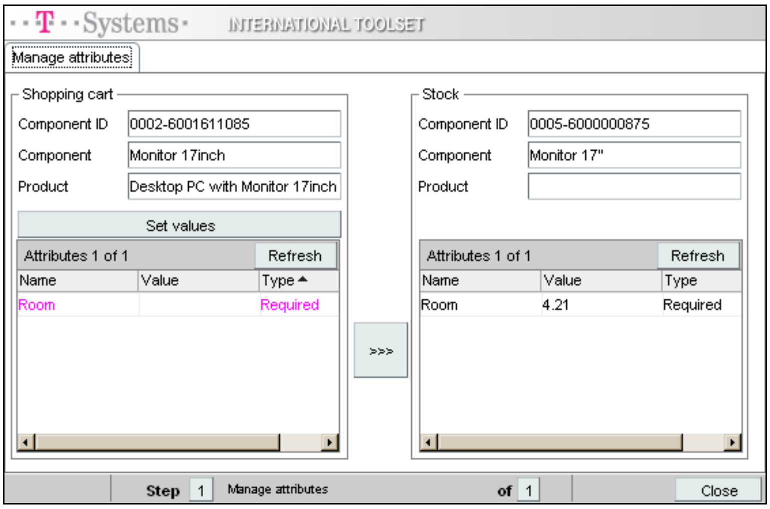


Fig. 69 Task Management – Function “Update CMDB – Install/Add” – fulfillment from stock – Manage attributes

To move the attribute value to the stock component, select the shopping cart attribute and press the button “>>>”. If the attribute is required and has no value, you get an error. In this case use the button “Set values”. The “Edit component attributes” dialog is opened to enter the attribute values. After setting the values of the required attributes, it is also possible to move them to the stock component.

If the “Manage attributes” dialog is closed without moving any attribute, no attribute data will be moved from the shopping cart component to the stock component.

3.3.16 Action: Update CMDB - System

TODO

Fig. 70 Task Management - Function “Update CMDB - System”

3.3.17 Action: Edit component

The function “Edit components” is displayed in a separate window. A technician can edit some attributes of the components for the selected Service ID in this dialog. The function appears in the list when a service task containing a Service ID has been selected.
Choose one of the radio buttons “All” (default), “Hardware” or “Others” to restrict the displayed components in the list. Select a component from the list, fill in the required fields and click the *Save* button to save your changes in the database. Proceed with the next component from the list.

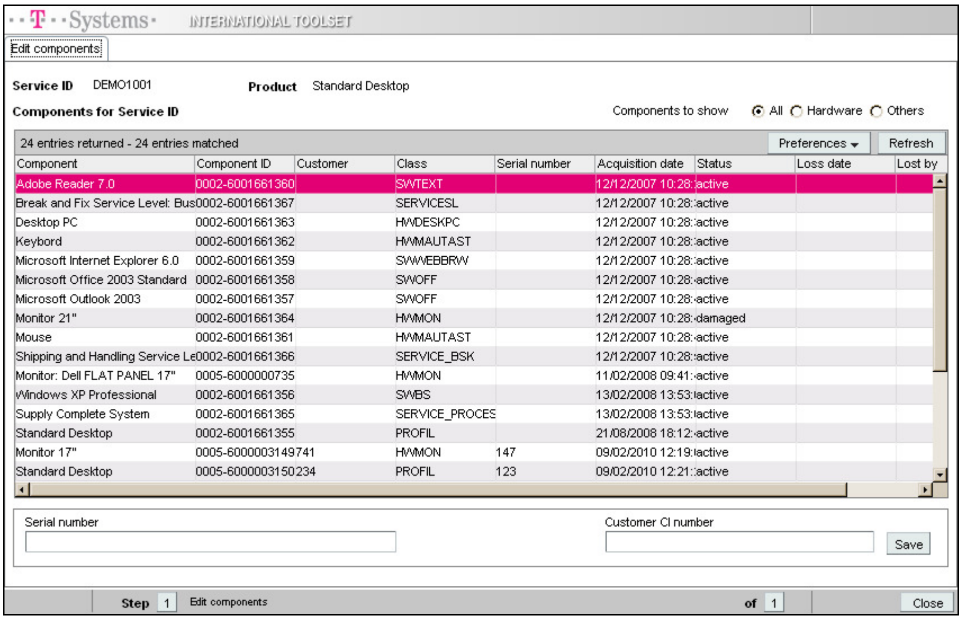


Fig. 71 Configuration Management – Function “Edit component”

3.3.18 Action: Customer contacts

The function “Customer contacts” is displayed in a separate window. In this dialog the customer contacts by phone / fax and rescheduling can be documented. Email or fax can be sent to the customer.

It consists of the following steps:

- Customer contacts
- Email/Fax
- Actions

Customer contacts: Customer contacts by phone or fax can be documented.

Email/Fax: Email/Fax can be sent to the customer.
Predefined templates for emails or fax are available for different cases. Press the button *Fill template* to fill the variables of the selected template. Click on the button *Send* to send the email or fax to the customer.

Actions: Caused by a customer contact the following actions can be processed:

- The customer contacts the assignee after the last possible attempt on the assignee’s side: The SLA deadline can be recalculated.
- A workaround solution has been processed: The efforts for the workaround can be entered. Click on the *save icon* to save the effort data. Press the button *Solution by workaround* to document the workaround solution in the database. The status of the

task will be changed to “Done”; the status of the incident ticket will be set to “Resolved”.

- The customer desired execution date is out of the SLA deadline:
  - The new date for the execution and the cause for the rescheduling can be entered.
  - The customer can be informed by fax or email about the rescheduling.
  - The SLA deadline will be changed.

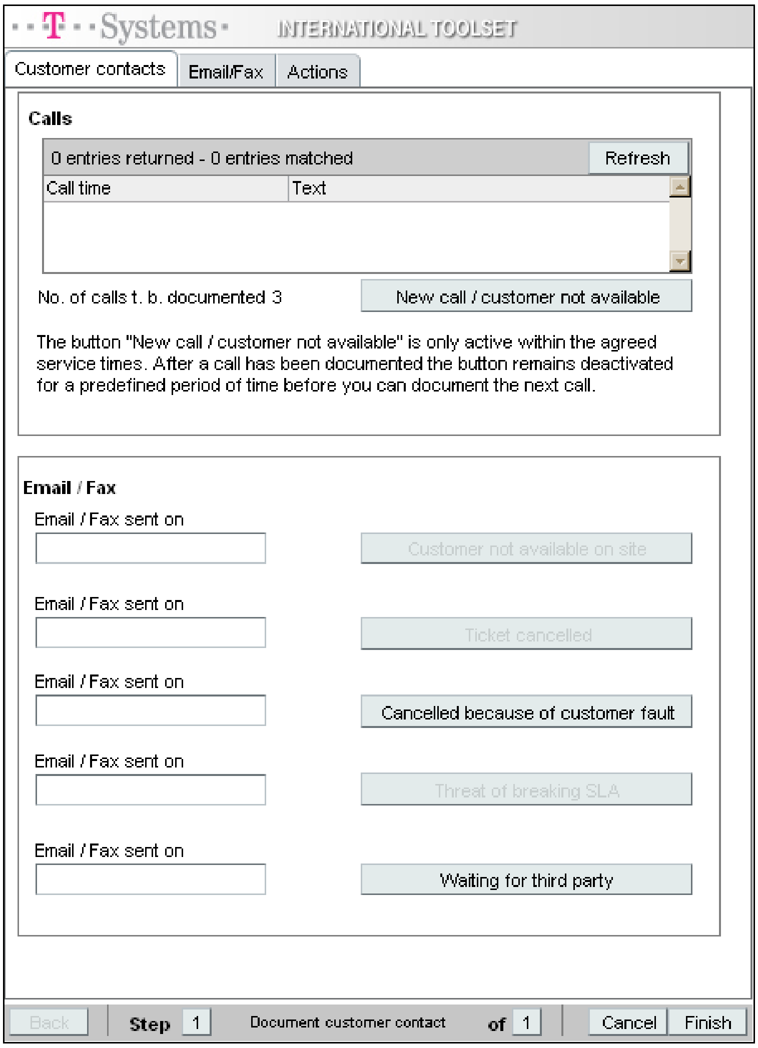


Fig. 72 Task Management – Function “Customer contacts”

3.3.19 Action: Close task

The function “Close task” is displayed in a separate window. It consists of the following steps:

- Cause of delay
- Update times
- Cause code (only for IM tasks)
- Update work log
- Closure category (only for IM tasks)
- Close task

Cause of delay:	This tab will only be displayed if the SLA deadline has expired. In this case a value in the field "Cause of delay" is required.
Update times:	Actual times and driven distance needed to solve the problem.
Cause code:	Incidents can be easily completed with predefined texts and closed by using "cause codes". After input of a "Best Guide" ID, the work log and the closure category will be automatically be filled.
Update work log:	A new entry for the work log can be added. The work log contains the description of the work that has been processed.
Closure category:	Known errors can be documented assigned to the task. There are two possibilities to enter an error description: A pre-defined value can be selected from the menu or an unformatted text can be added in a separate window.
Close task:	Click on the Button Finish to save data entry and to close the task. The status of the task will be changed to "closed". If no "Task finished" date is set, the current timestamp is set by the system. The "Task finished" date has to be set after create date of source task and within a time interval which is set for the company. (Default interval : today 00:00:00 – today current time) Hint: Depending of the filter selected tasks with status "closed" will be displayed in the task management or not.

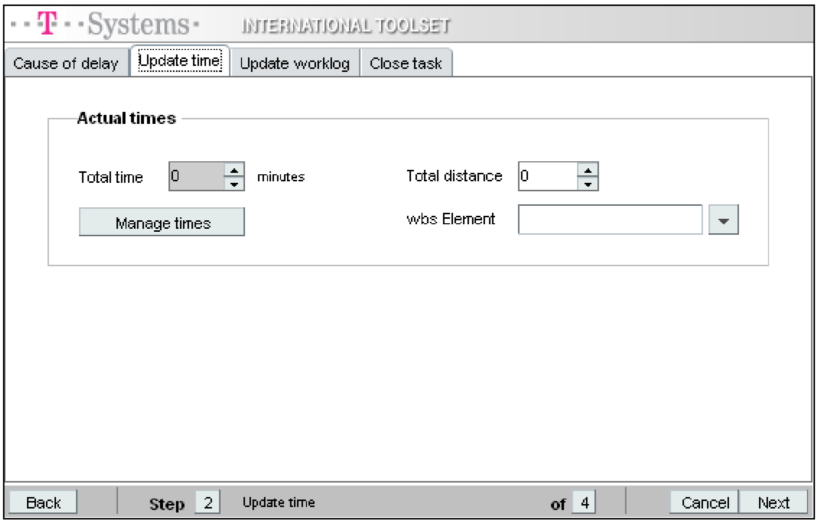


Fig. 73 Task Management – Function "Close task" (OM version)

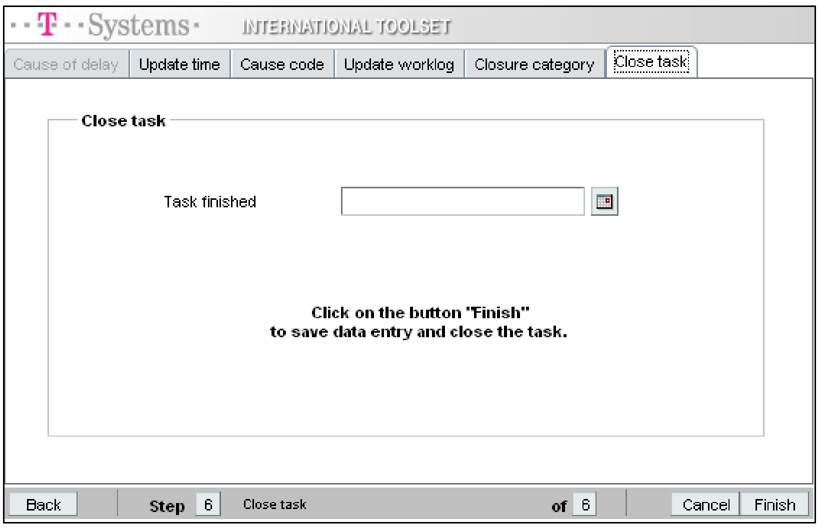


Fig. 74 Task Management – Function "Close task" (IM version)

3.3.20 Action: Cancel task

The function "Cancel task" is displayed in a separate window. It consists of the following steps:

- Cancellation cause
- Cause of delay
- Cause code (only for IM tasks)
- Update worklog
- Closure category (only for IM tasks)
- Cancel task

In this dialog a task can be cancelled and a cause for the cancellation can be entered. If the SLA deadline has expired a cause of delay must be added.

Cancellation cause:	A cancellation cause can be entered and will be added to the worklog of the task.
Cause of delay:	This tab will only be displayed if the SLA deadline has expired. In this case a value in the field "Cause of delay" is required.
Cause code:	Incidents can be easily completed with predefined texts and closed by using "cause codes". After input of a "Best Guide" ID, the work log and the closure category will be automatically be filled.
Update work log:	A new entry for the work log can be added. The work log contains the description of the work that has been processed.
Closure category:	Known errors can be documented related to the task. The field "incident history" shows the errors that have been detected in the past (read-only field).
Cancel task:	Click on the button *Finish* to save the entered data and process the cancellation of the task. The status of the task will be changed to "cancelled". Hint: Depending of the filter selected tasks with status "cancelled" will be displayed in the task management or not.

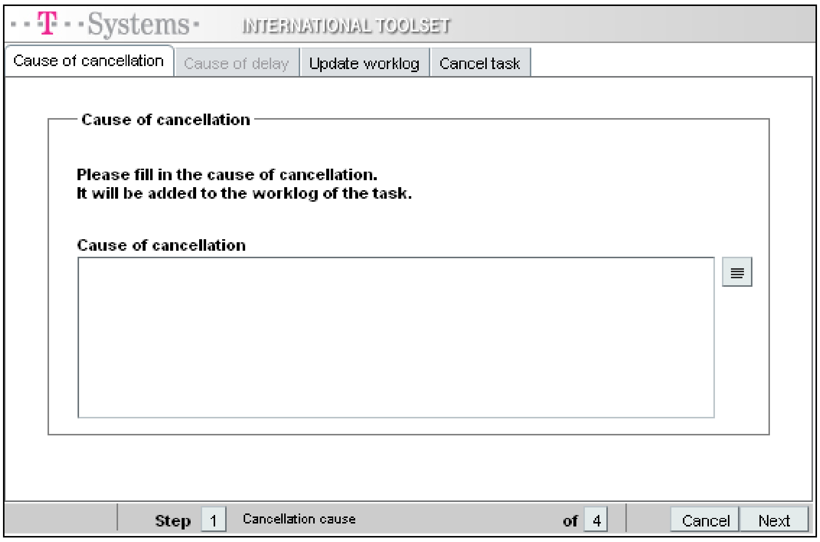


Fig. 75 Task Management – Function "Cancel task" (OM version)

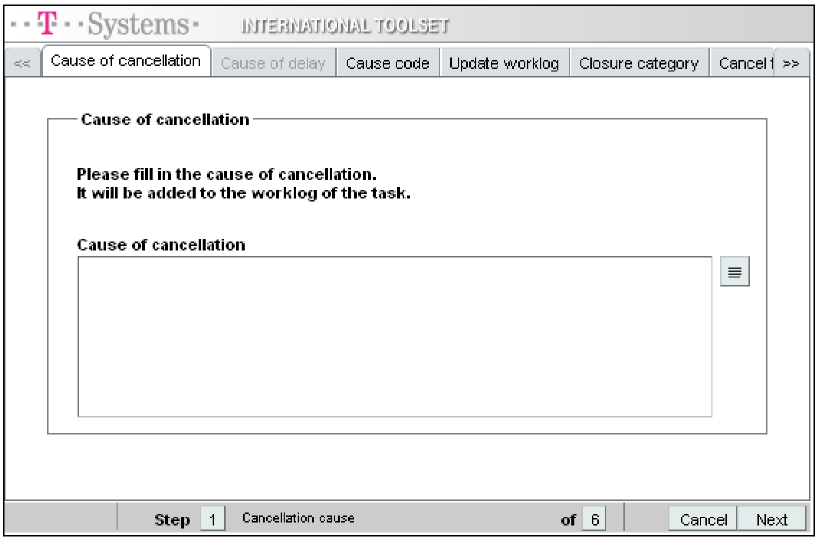


Fig. 76 Task Management – Function “Cancel task” (IM version)

3.3.21 Action: Back to Service Desk

This function is used to assign the incident ticket back to service desk.

Update times:	Actual times and driven distance needed to solve the problem.
Cause code:	Incidents can be easily completed with predefined texts and closed by using “cause codes”. After input of a “Best Guide” ID, the work log and the closure category will be automatically be filled.
Update work log:	A new entry for the work log can be added. The work log contains the description of the work that has been processed.
Closure category:	Known errors can be documented related to the task. The field “incident history” shows the errors that have been detected in the past (read-only field).
Cause of delay:	This tab will only be displayed if the SLA deadline has expired. In this case a value in the field “Cause of delay” is required.
Back to service desk:	Click on the button *Finish* to save the entered data and send the task back to service desk. The status of the task will be changed to “done”. Hint: Depending of the filter selected, tasks with status “done” will be displayed in the task management or not.

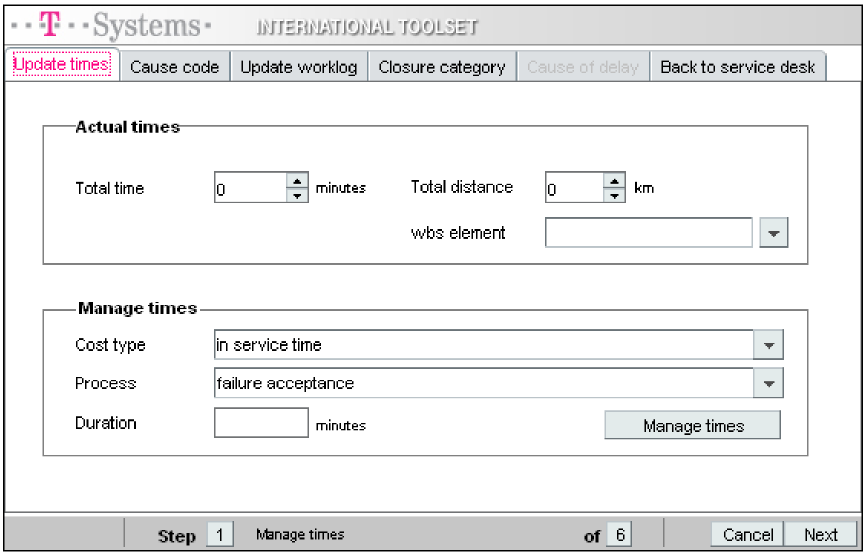


Fig. 77 Task Management - Function “Back to Service Desk”

3.3.22 Action: Print

The function "Print" is displayed in a separate window. In this dialog standard or customer-specific documents and reports with ticket or asset data can be printed.

Examples for printouts:
- Audit report
- Service order compact
- Service order for external technicians
- Acceptance report Task Management

Two versions of printouts are available:
- Download as PDF document
- Fax

For the fax a fax number is required.

Additionally you can choose a language for the printout from the menu. The list can be sorted with a click on a column name. Selecting a row in the report will start the download of the PDF document or send out the fax. The selected row will be highlighted in magenta.

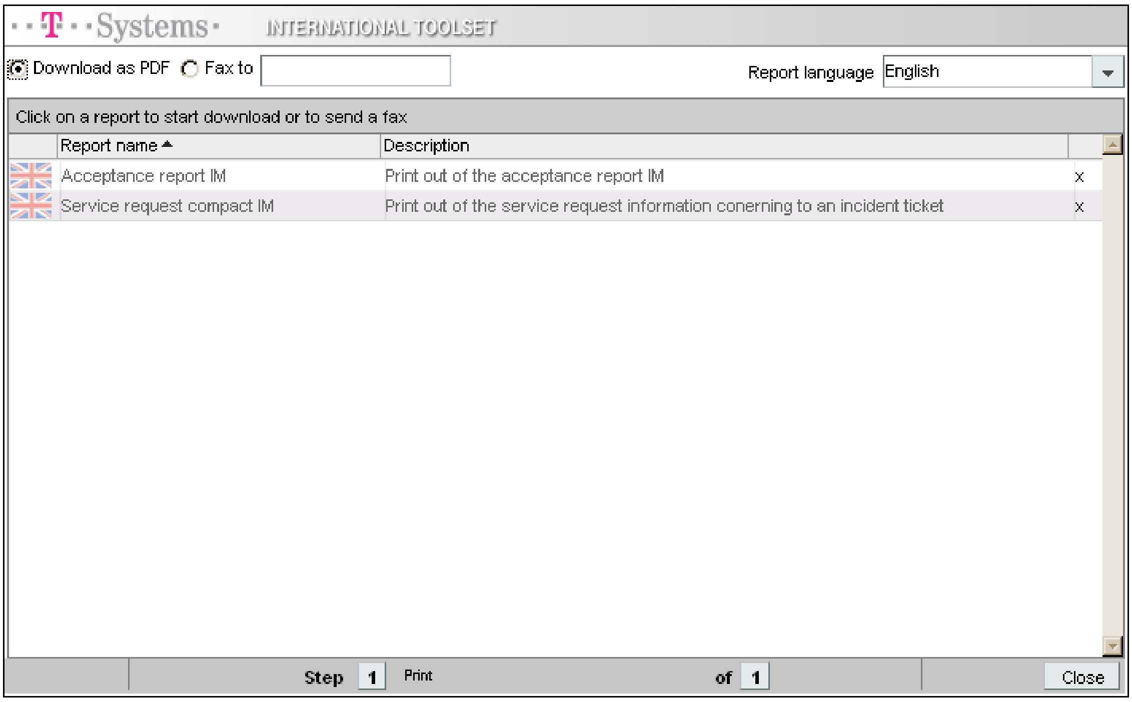


Fig. 78 Task Management – Function "Print"

3.3.23 Action: Download tasks

This function can be use to create Excel reports from the tasks to which the user has access.

Reporting period:	It is possible to set a filter for opened time or closed time of the reported tasks.
Filter:	A filter for the reporting data can be set for company – country, team, product and processing status.
Export:	There are two reports which can be created. With the first one only the task data will be used. The second report extracts also the regarding shopping cart data.

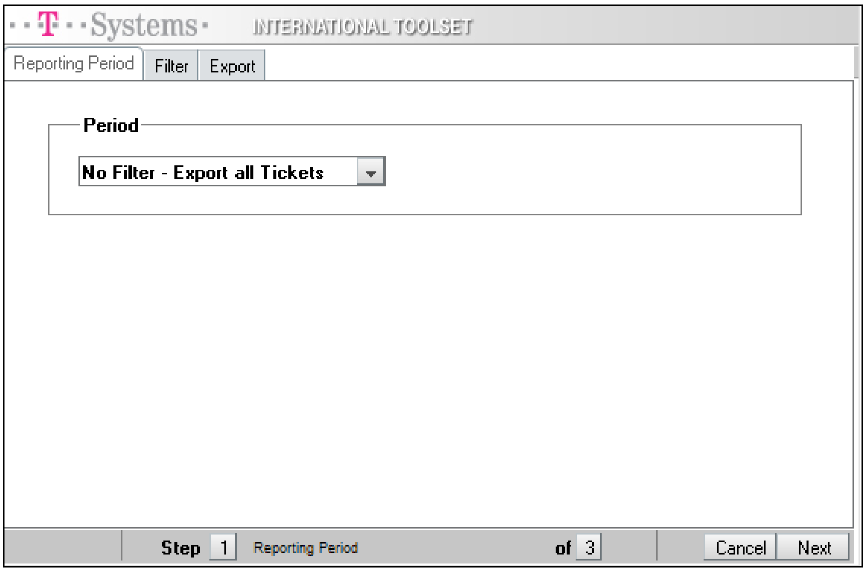


Fig. 79 Task Management - Function “Download tasks”

3.3.24 Action: Manage attachments

With the function “Manage attachments” you can open an attachment for the ticket.

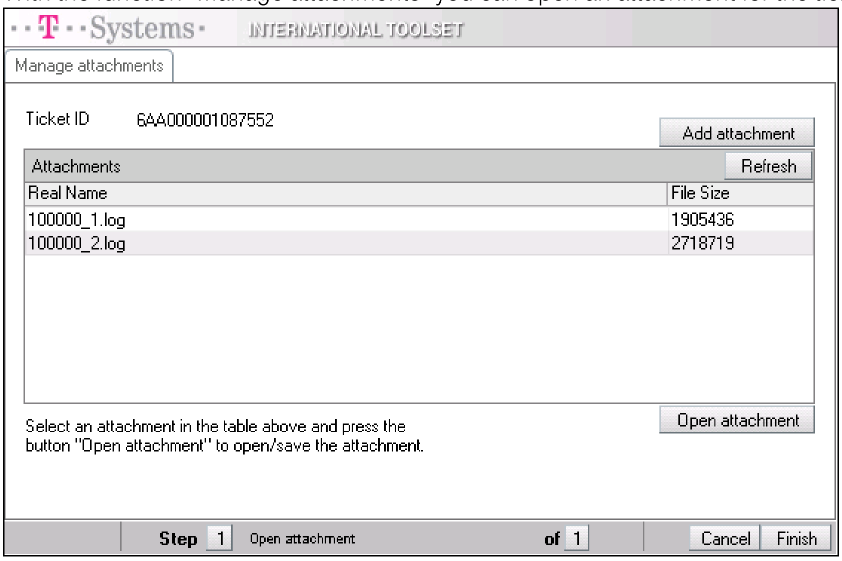


Fig. 80 Task Management - Function “Manage attachments”

When the dialog is open, you can see a potentially attached file in the table. To open it, you click on the file and then on the *Open attachment* - Button. You can add attachments by clicking on the *Add attachment* – Button.

3.3.25 Action: Manage related system

This function leads you to the Configuration Management Console, where different functions can be applied on the pre-selected CI which is related to the task you came from. From there you can get back with the function “Show related task”.

3.3.26 Action: Search for system/component

The function “Search for System/component” is displayed in a separate window. In this dialog you can search for a configuration item by several pre-defined criteria.

The search criteria are (pre-defined):

- CI ID / Asset IDr
- Serial number
- Customer component ID
- Service ID

For each criterion a particular value is required in the field “Search value”, e.g. a serial number. Click on the button *Search* to start the request. If the configuration item was found the dialog “Show related system” will be displayed.

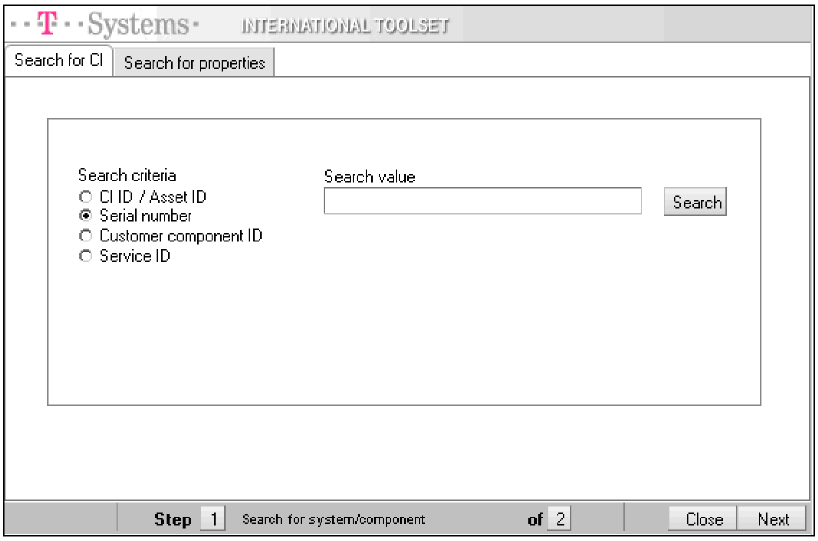


Fig. 81 Task Management – Function “Search for System/component”

On the second page systems can be searched by attributes. The following steps describe the initialisation of the attribute search:
1. Select a company
2. Select a product
3. (optional) The search result can be restricted by adding attribute conditions. It is possible to combine more than one attribute condition. Attribute conditions are combines by using the logical joins AND and OR. To add an attribute condition the following steps are necessary:
3.1 Select attribute
3.2 Enter attribute value

3.3 Select logical join (AND, OR)
3.4 Press button *ADD Condition* to add the condition
For different attribute conditions repeat the step 3.1-3.4 above.
Added attribute conditions can be removed after selection at the table by pressing the button *REMOVE Condition*.

4. Start search by pressing the button *Search*

The button *Reset* resets the complete search condition.

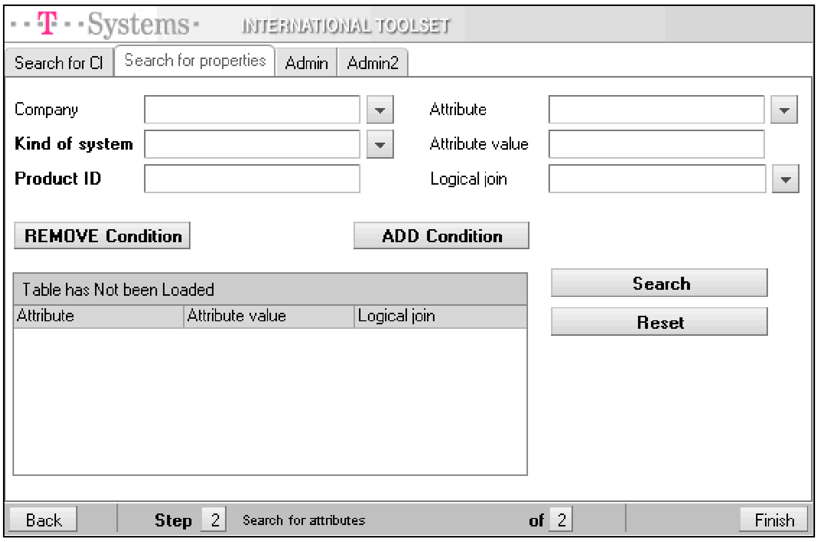


Fig. 82 Task Management – Function "Search for attributes"

3.3.27 Action: Service request details

The additional information of the appropriate service request.

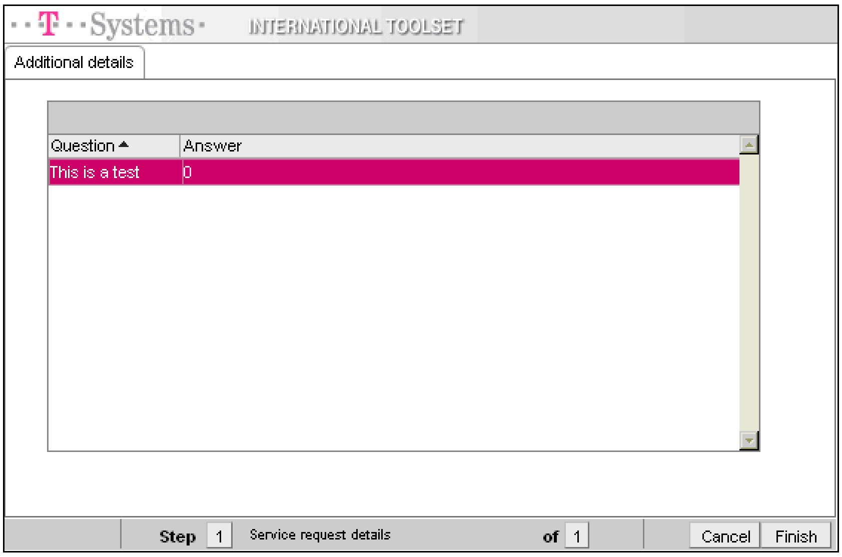


Fig. 83 Task Management - Function "Service request details"

3.3.28 Action: Show related incident

The links opens the Incident Management Console where the related incident is pre-selected. From there you can get back with the function “Show related task”.

3.3.29 Action: Show related service request

Click on this link to see the service request related to the task. The module “Service Request Management” will be opened and the related task will be shown in the Service Request Overview.

3.3.30 Action: Show related system

The function “Show related system” is displayed in a separate window. The system is only displayed. It cannot be changed. It consists of the following steps:

- Product
- Location
- Network data
- Comments
- Characteristics
- Configuration items

Product:	Detailed information about the product like product name, the status of the asset (activated, deactivated etc.), the service level, system type, the activation and deactivation date.
Location:	Detailed information about the customer location like customer’ s organization data, first name and surname of the responsible end user, location data.
Network data:	Network and configuration data like IP address, network name, MAC address etc.
Comments:	Comments from the customer or field service in separated fields.
Characteristics:	Special characteristics of the asset like information about the processor, main memory, disk storage, operating system, BIOS.
Components:	A list of components related to the product with detailed information about the system.
Component attributes:	A list of attributes related to the components with additional information.

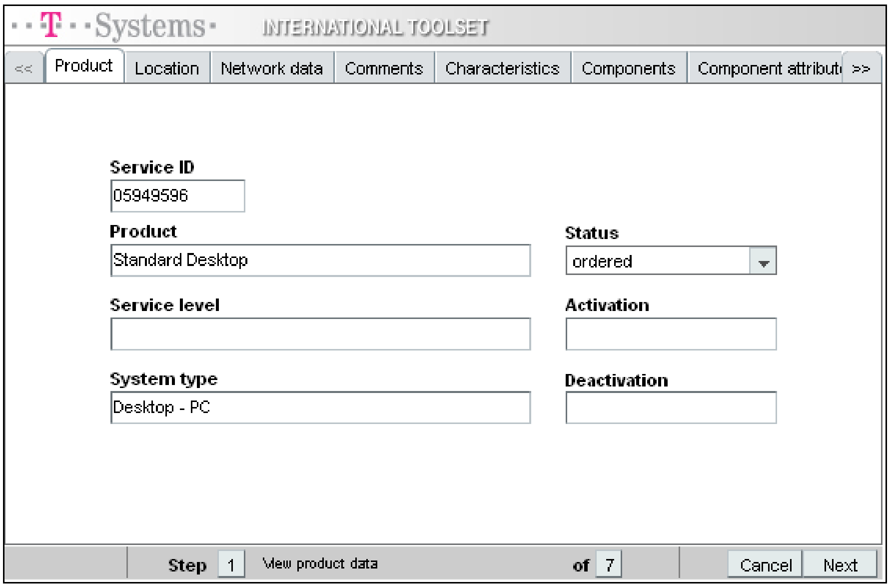


Fig. 84 Task Management – Function "Show related system"

3.3.31 Action: Edit installation parameter

TODO

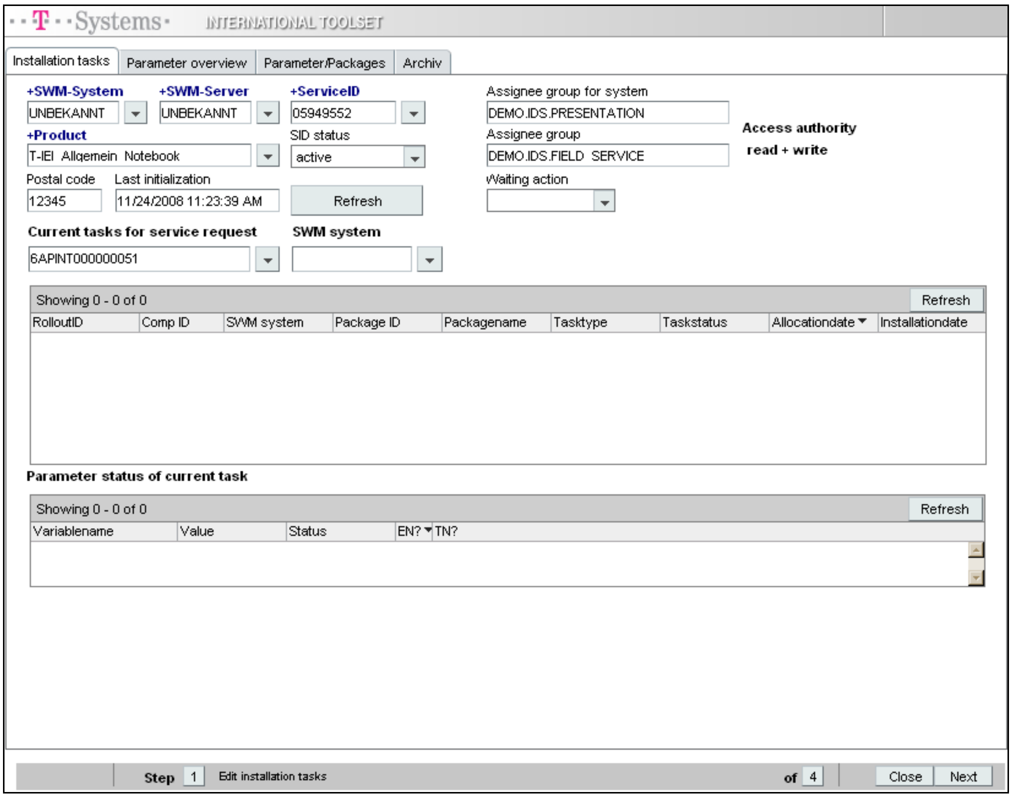


Fig. 85 Task Management - Function "Edit installation parameter"

3.3.32 Action: Subsequent delivery

With this function you can influence the delivery of components.
The function has to be configured for the company by application support.

First you have to select the reason from the menu of the field “Select cause”.

Then select the component from the table field.
If the components are without receipt of goods, you press the button *ordered components >* in order to avoid the purchase of this component.
The component/s appear in the table “Components without compensation delivery”.
This is the end of this process. You can now activate the other component with the function “Update CMDB – Install/Add”.

If the components are with receipt of goods, you press the button “delivered components >” in order to send them back.

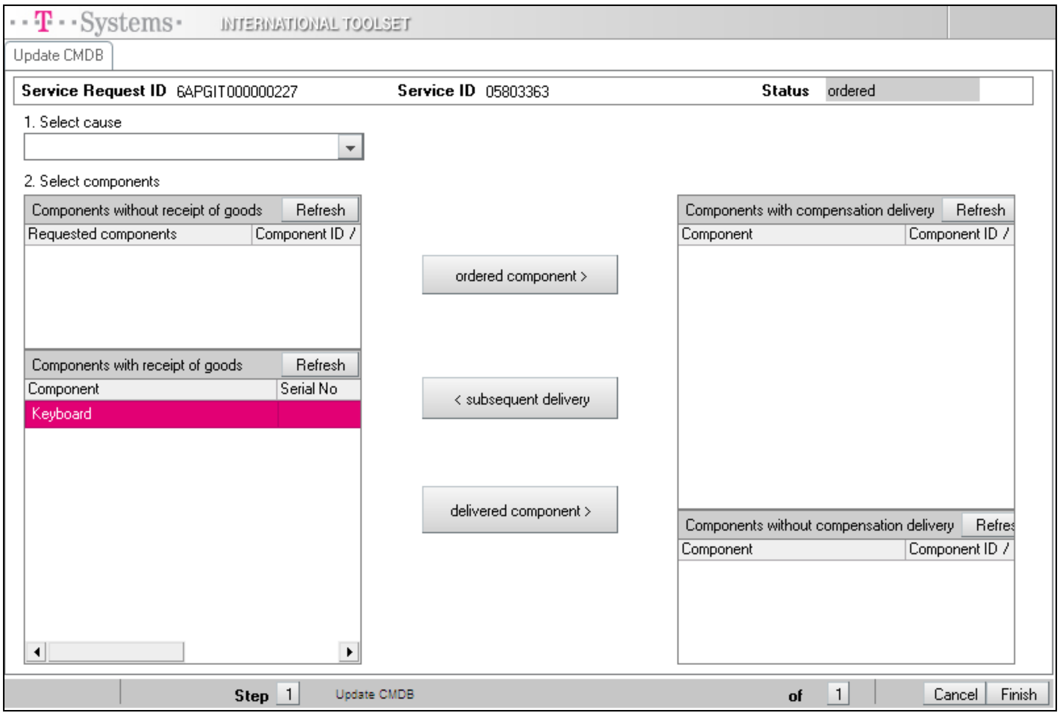


Fig. 86 Task Management - Function “Subsequent delivery”

In the following dialog indicate whether the components are already fetched or not and then press the button >.

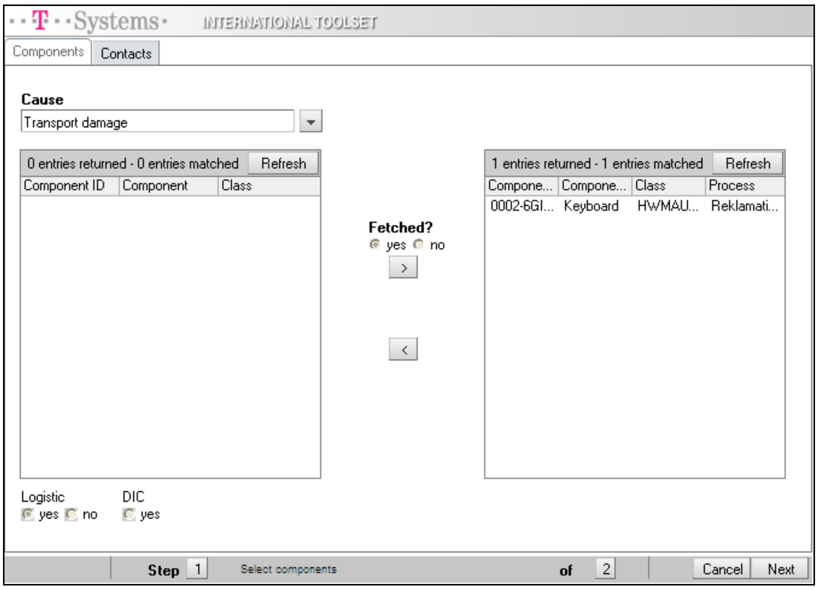


Fig. 87 Task Management - Function "Subsequent delivery"- select components

By pressing the button Next you reach the following page.

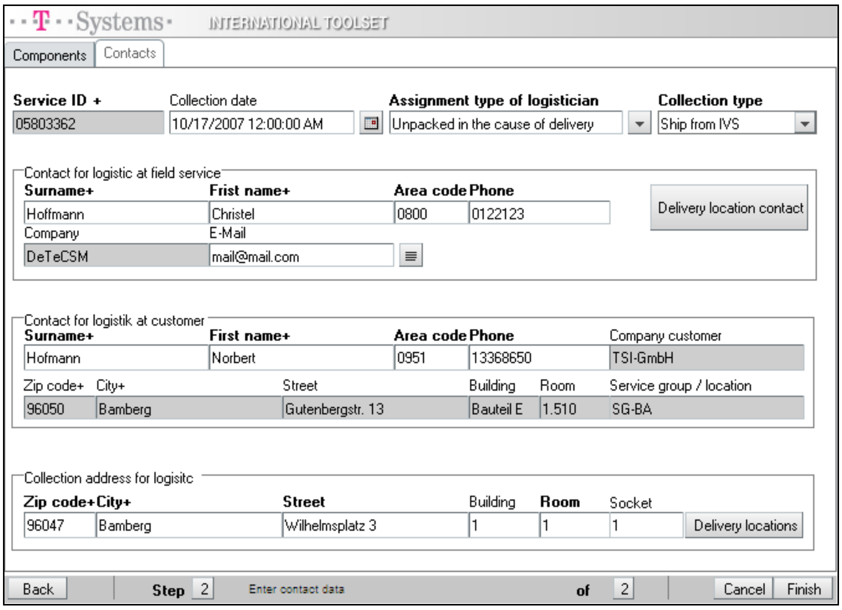


Fig. 88 Task Management - Function "Subsequent delivery"- enter contact data

After you filled in all information needed, press the button *Finish*.
The components are now part of the rollback process.

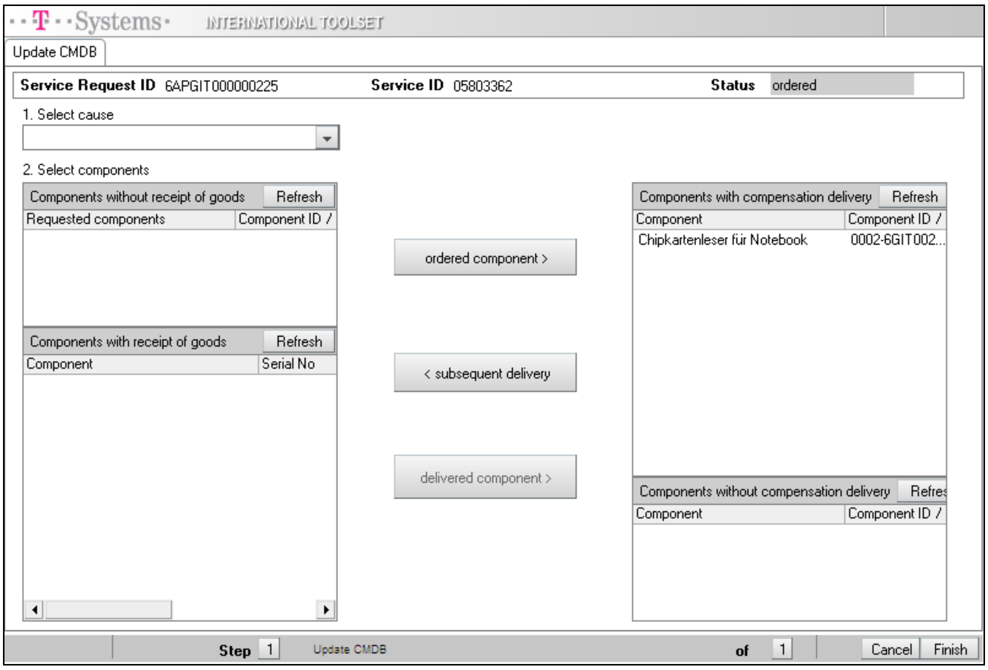


Fig. 89 Task Management - Function "Subsequent delivery"- update CMDB

When you are informed that the components are delivered newly, enter the dialog, mark the component in the table "components with compensation delivery" and press the button *< subsequent delivery*. The component is shown in the table "Components with receipt of goods", as shown in the next figure. This is the end of this process. You can now activate the component with the function "Update CMDB – Install/Add".

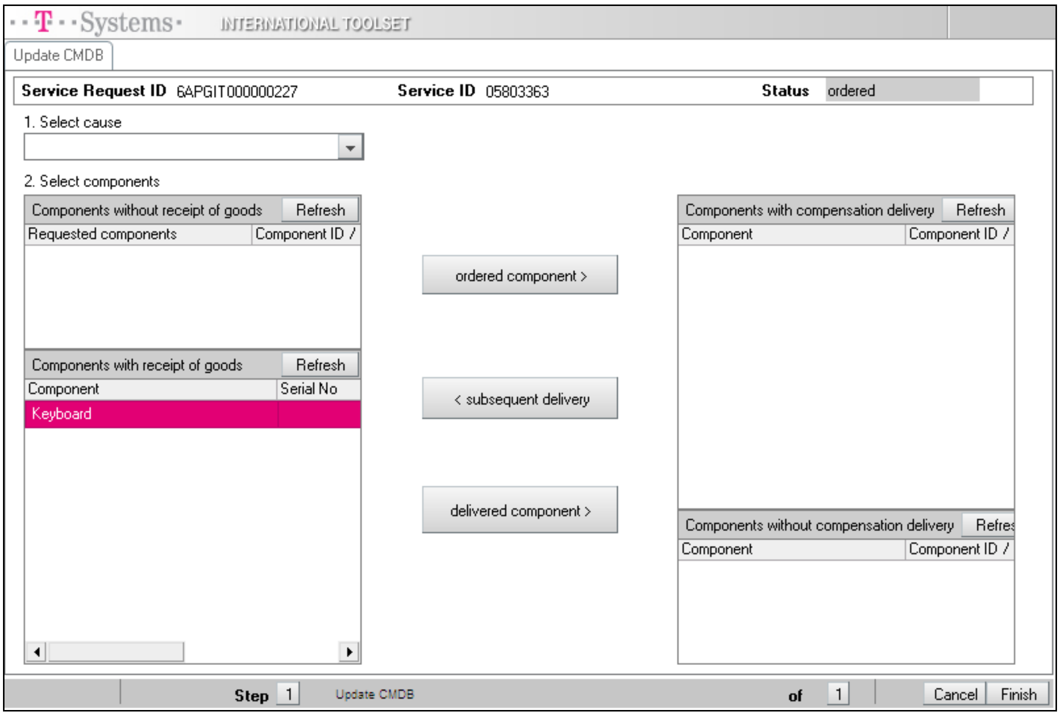


Fig. 90 Task Management - Function "Subsequent delivery"- update CMDB

3.3.33 Action: Request predefined search

This function should be used to request a new search for the actual application that will afterwards appear in the menu “Search for” on top of the page. You can only request a new search for the application that you are in and therefore have access to.

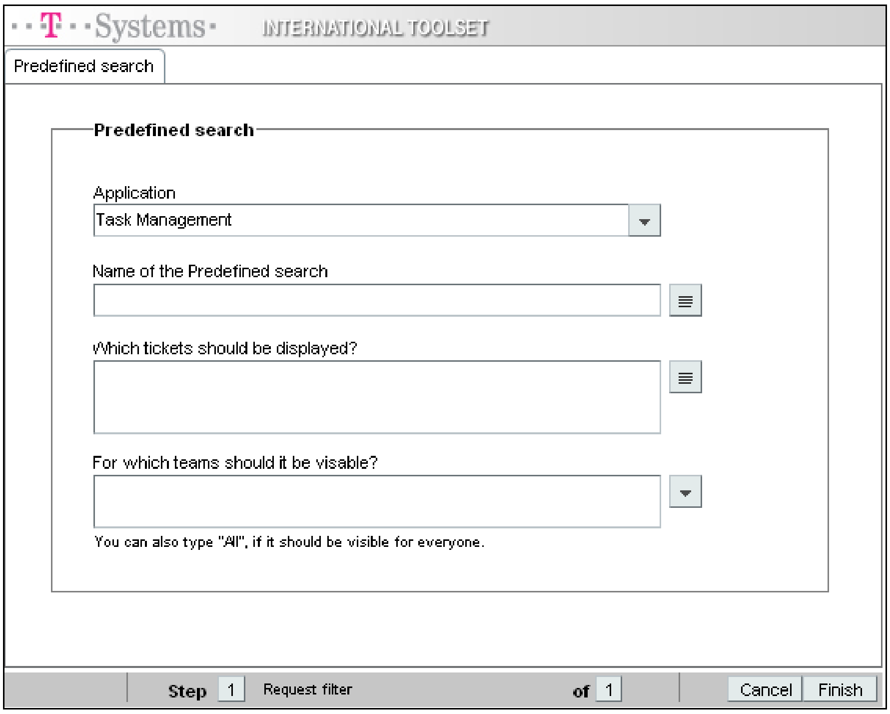


Fig. 91 Task Management – Function “Request predefined search”

Fill in all fields and send the request by clicking the “Finish” button. Keep in mind that you should clearly describe what you want to search for and who should be able to use this search.

3.3.34 Action: New contact

With the function “New contact” you can acquire attributes of a person related to the company of the selected ticket.

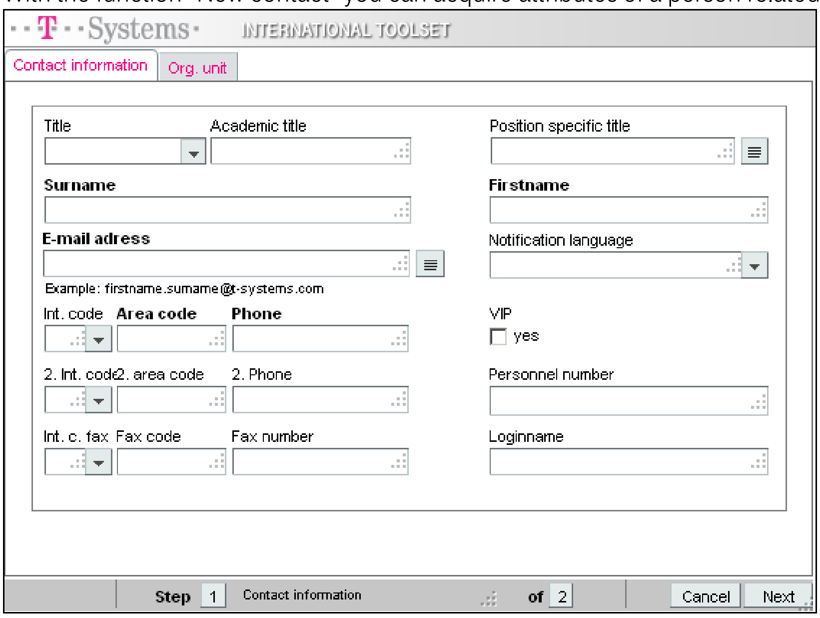


Fig. 92 Task Management - Function “New contact”

3.3.35 Action: Manage contacts

With the function “Manage contacts” you can change attributes of a person related to the company of the selected ticket.

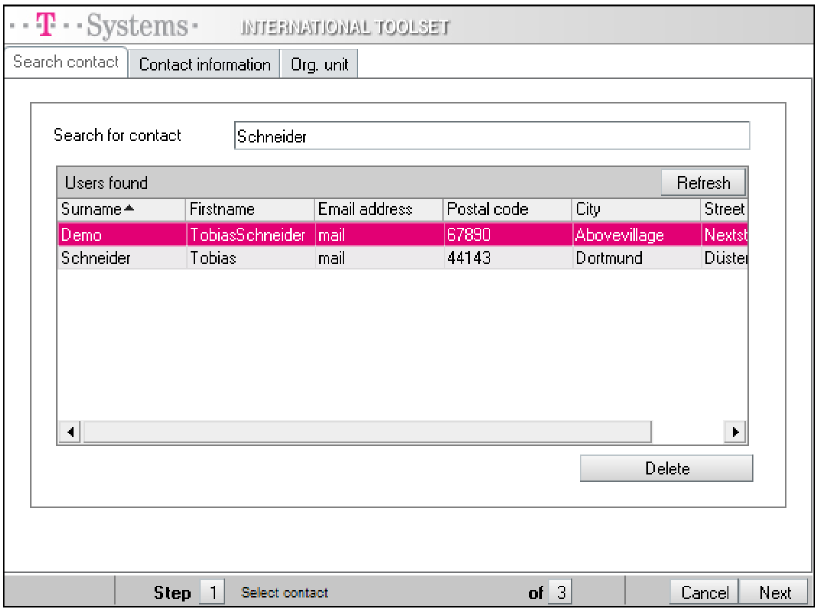


Fig. 93 Task Management - Function “Manage contacts”

After opening the dialog you select a user from the table. To search in a large number of data you can fill in the surname or first name in the field “Search for contact” and press enter or the “Refresh”-Button. By double-click the user is displayed on the following two pages.

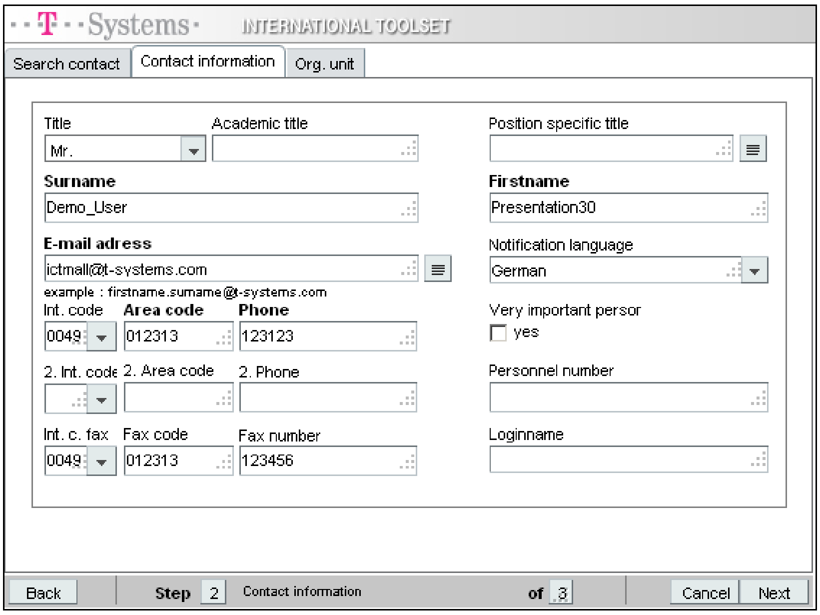


Fig. 94 Task Management - Function “Manage contacts” – contact information

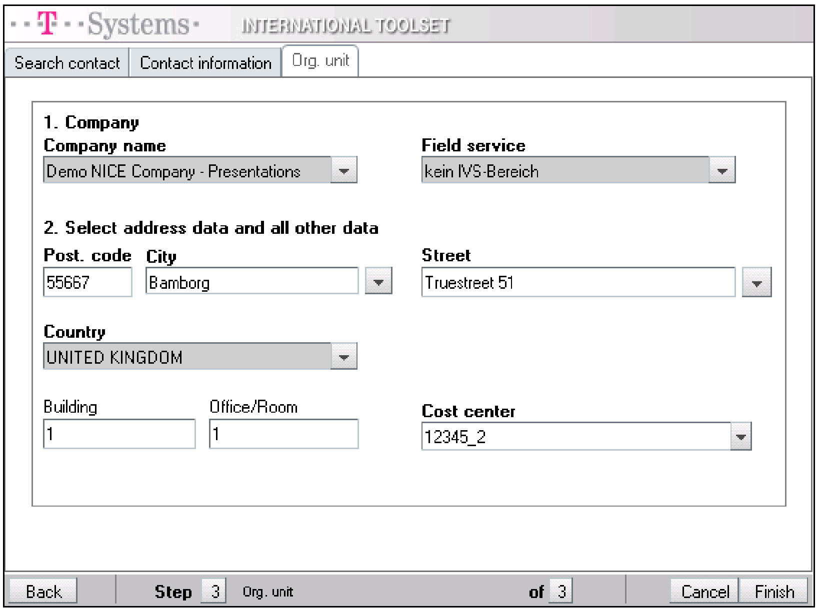


Fig. 95 Task Management - Function “Manage contacts” – org unit

When you modified the value in the fields that can be edited, you have to press the *Finish* button to save the changes.

3.3.36 Action: Send message

TODO

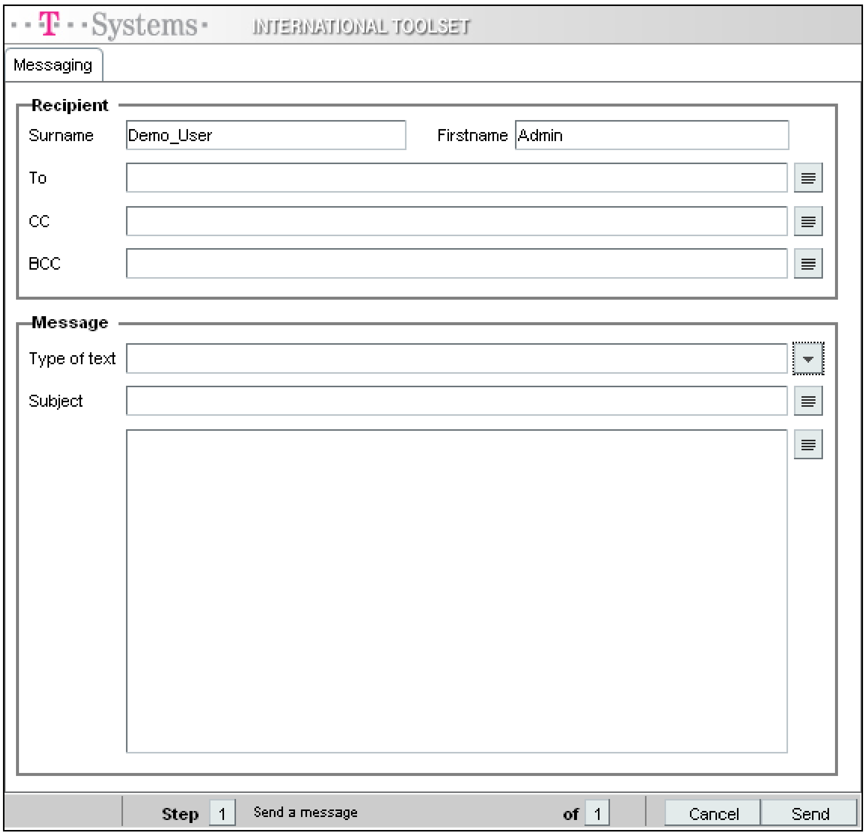


Fig. 96 Task Management - Function “Send message”

3.3.37 Action: Reopen task

This link modifies the status of the selected task. The status is set to “Assigned”. This functionality works only for orders.

3.3.38 Action: Show history

This function is used to show the task history and, if available, the incident history.

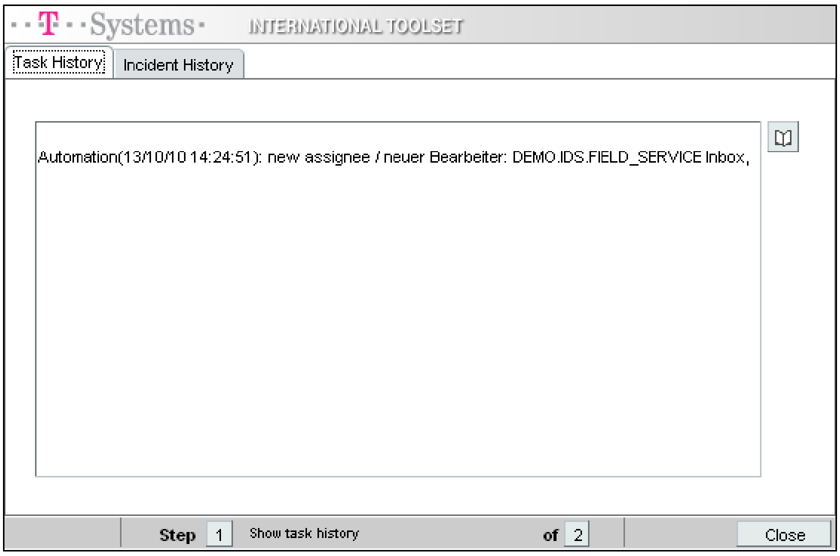


Fig. 97 Task Management - Function “Show history”

3.3.39 Action: Suspend ticket

TODO

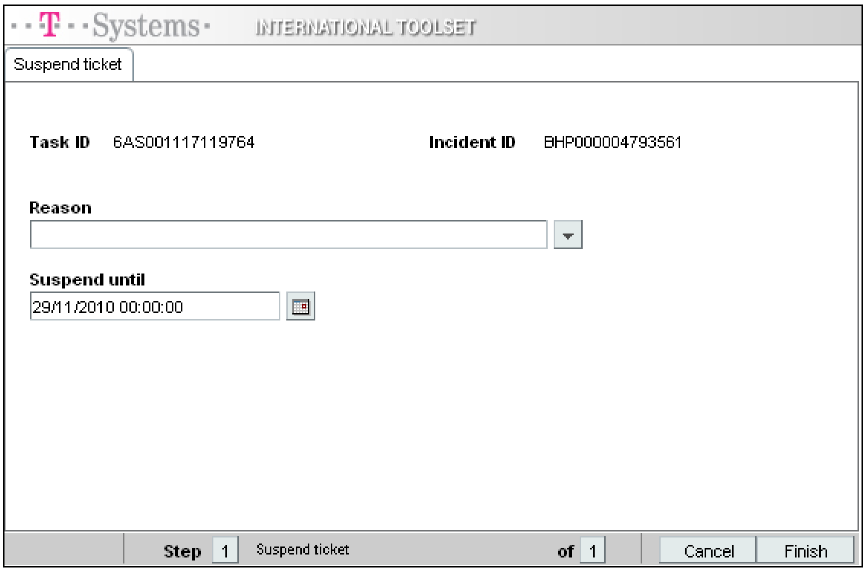


Fig. 98 Task Management - Function “Suspend ticket”

3.3.40 Action: Show activities

For clustered tasks the single activities will be shown in the following dialog:

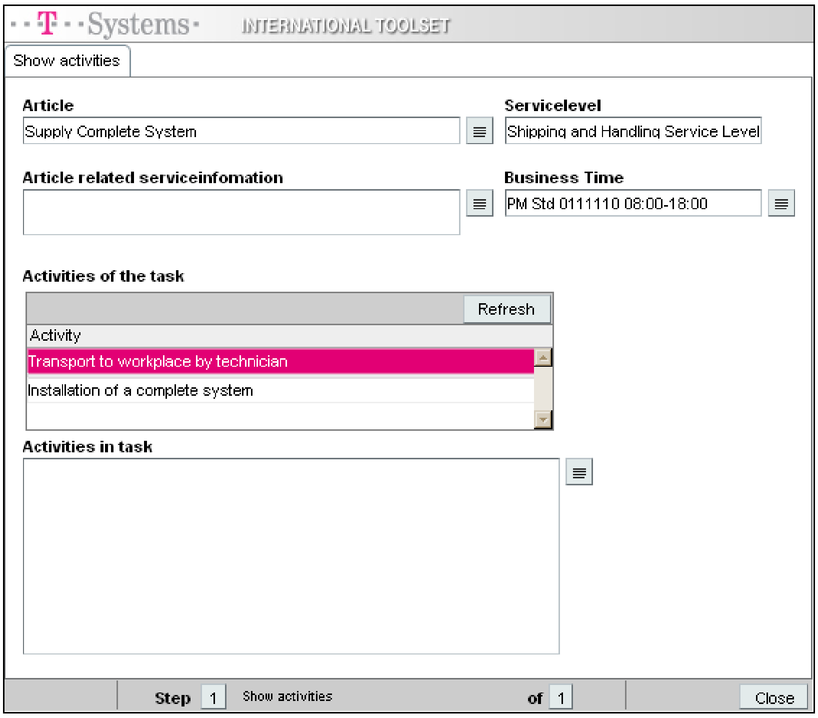


Fig. 99 Task Management - Function "Show activities"

3.3.41 Action: Inventory viewer

This function displays in a new window the current system data of the appropriate system of the incident task.

3.3.42 Action: Edit component attributes

The function "Edit component attributes" is displayed in a separate window. A technician can edit additional component attributes for the selected Service ID in this dialog. The function appears in the list when a service task containing a Service ID has been selected.

Just mark the attribute, fill in the value and press *Save value*. To delete the value, enter $NULL$ in the field and press *Save value*. If the component attributes are required, you get an error and cannot delete the value.

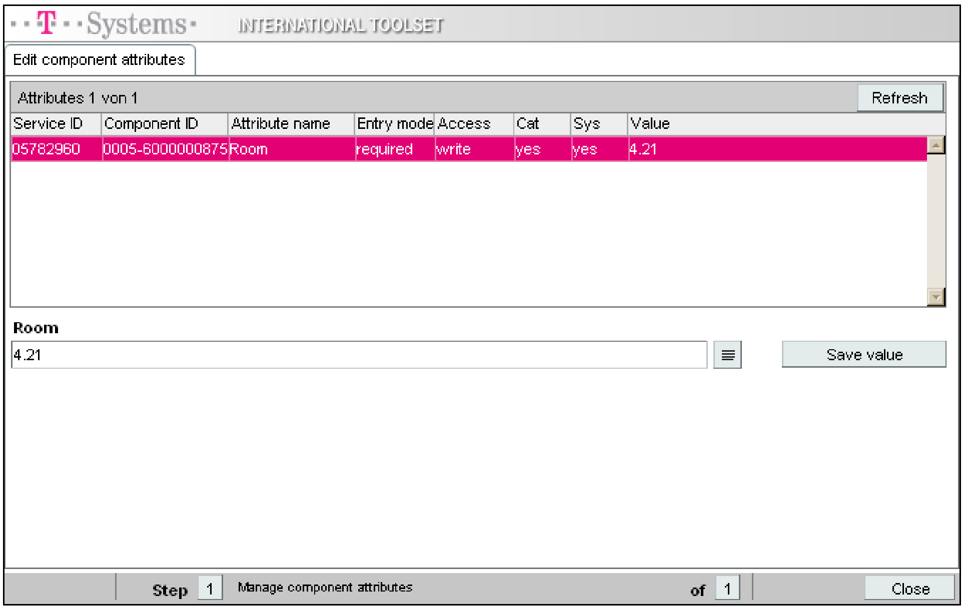


Fig. 100 Configuration Management – Function “Edit component attributes”

3.3.43 Task Info Tab Panel

<u>Tab: Task</u>

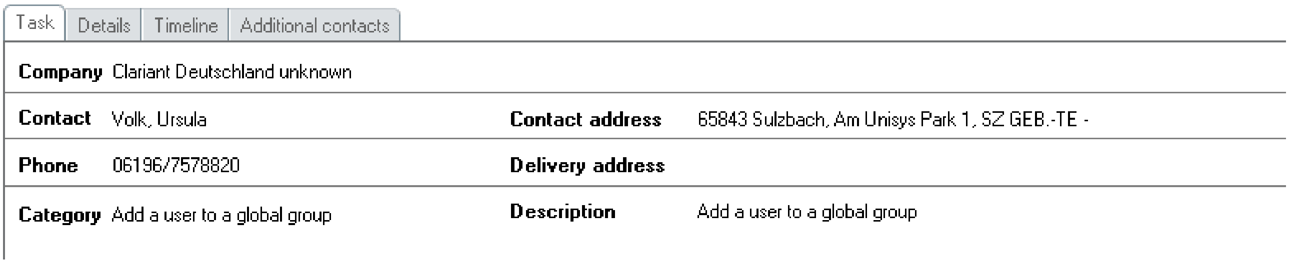


Fig. 101 Task Management - Task Info Tab: Task

The tab “Task” shows the contact information, the delivery address of the customer and the category of the incident or service request for the selected task.

<u>Tab: Details</u>

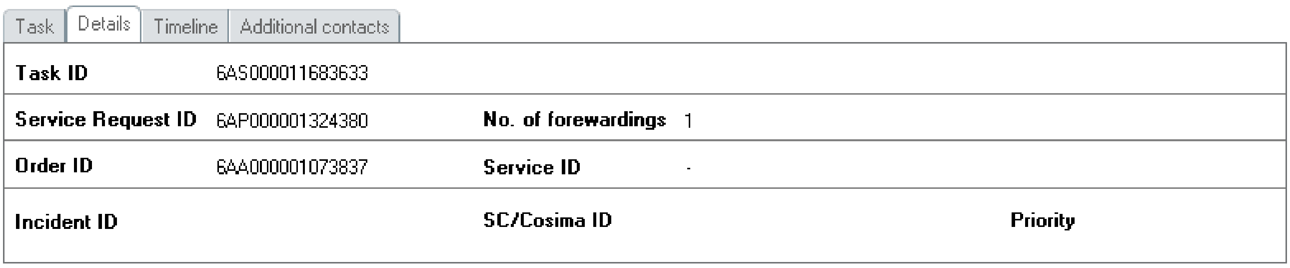


Fig. 102 Task Management - Task Info Tab: Details

The tab “Details” shows further details related to the selected task like task ID, order ID and information about the production process.

<u>Tab: Timeline</u>

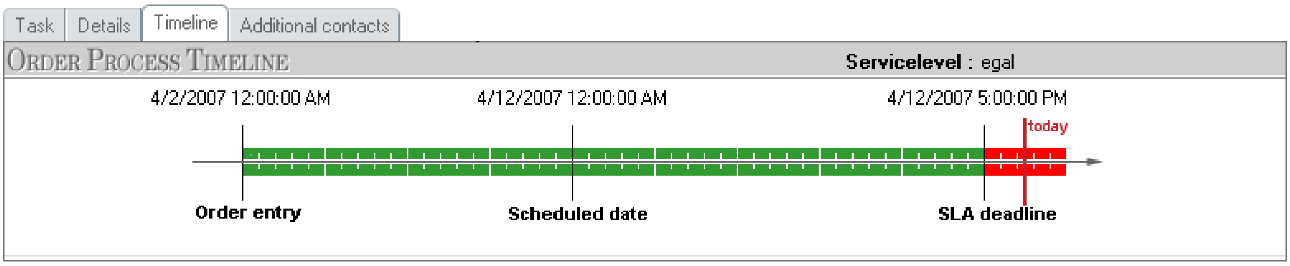


Fig. 103 Task Management - Task Info Tab: Timeline

The tab “Timeline” illustrates the time scheduling within the supply chain process for the selected task.

Tab: Additional contacts

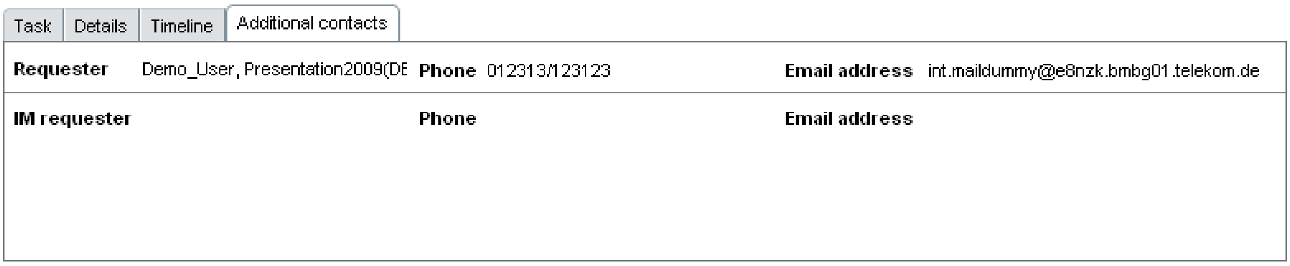


Fig. 104 Task Management - Task Info Tab: Additional contacts

The tab “Additional contacts” shows the requester and the contact information of the requester.

The tabs get colored, if a copy of a task or a VIP-task is selected.

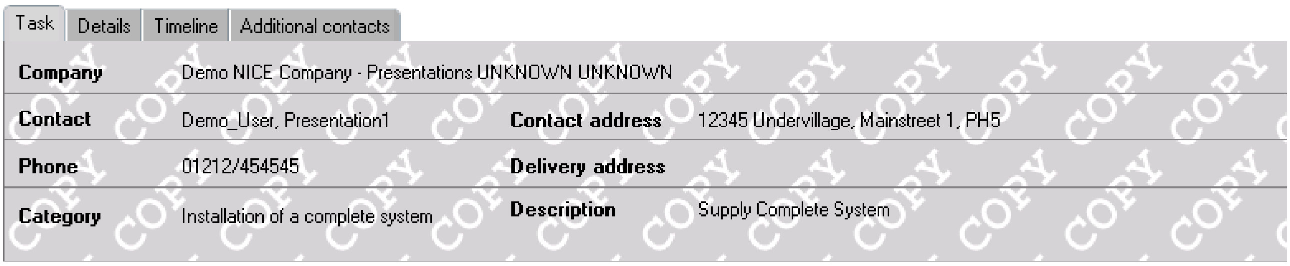


Fig. 105 Task Management - Task Info Tab: Task (task copy)

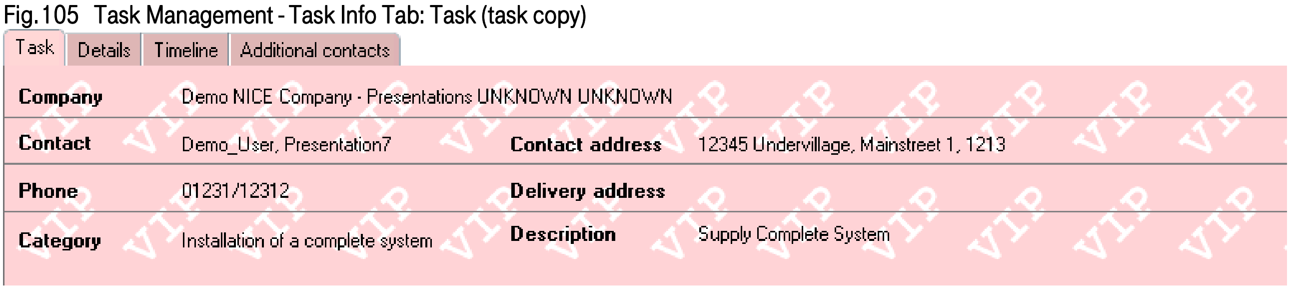


Fig. 106 Task Management - Task Info Tab: Task (VIP)

3.3.44 Worklog

Fig. 107 Task Management - Task Worklog Area

In the worklog the particular steps for the execution of the task can be documented in chronological sequence.

3.4 Configuration Management

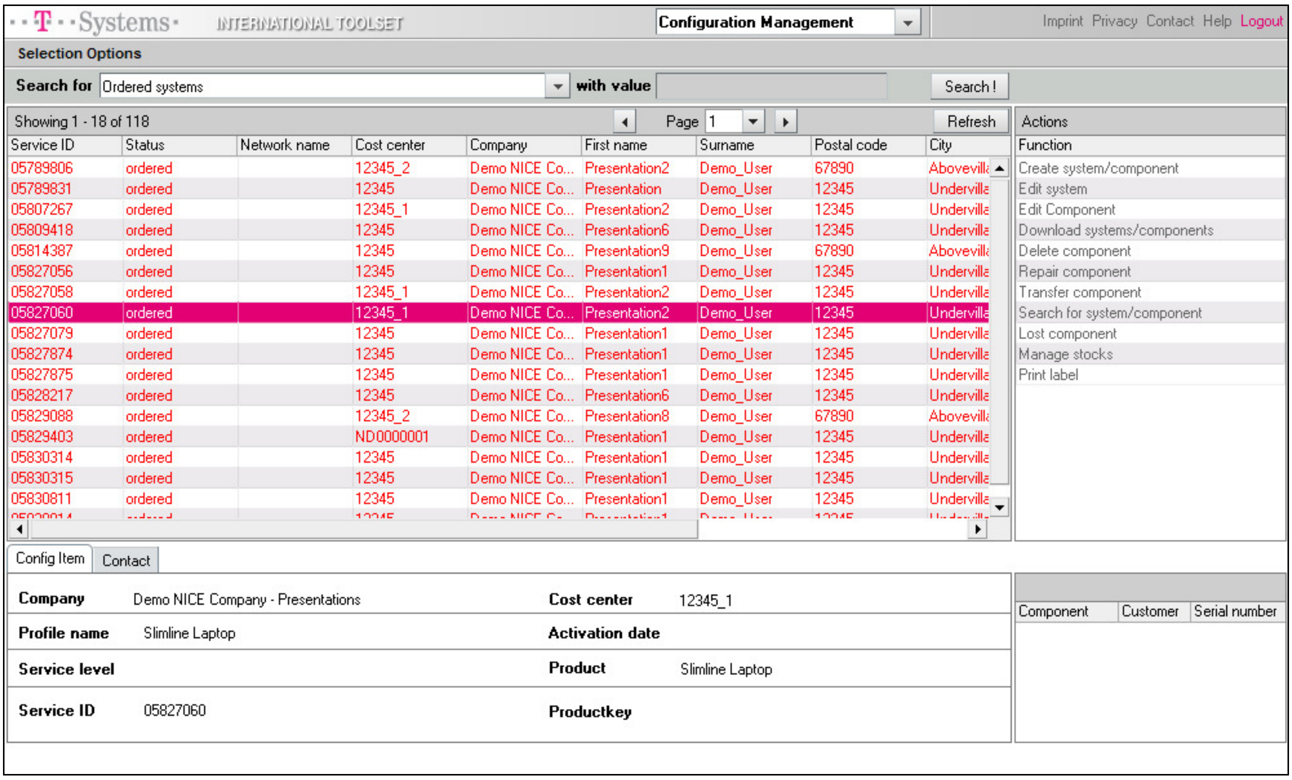


Fig. 108 Configuration Management Frontend

The Configuration Management consists of

- the selection option panel (at the top of the page)
- the system overview (in the middle of the page)
- the system action panel (on the right frame of the page)
- the detailed information of the selected system (on the bottom of the page)

By default all ordered systems according to the users access rights are shown. While no system is selected in the system overview, the system action panel in the right frame and the system detail panel on the bottom of the page are empty.

In the module Configuration Management the user can get an overview of the systems. If the company of the selected system is not using the billing module of the tool suite, which is not part of webSRM, there is the possibility of creating, deleting and transferring systems. These functions are not part of this manual at this time.

Selection Options Panel

Fig. 109 Configuration Management Frontend - Selection Options Panel

You can reduce the number of systems displayed in the system overview by using pre-defined filters. A filter consists of the filter name ("search for") and a value ("with value") as an additional search criterion, if necessary. If no additional value is required for the filter the field "with value" is write-protected.

<u>Search for</u>

Here you can select a pre-defined filter to reduce the number of systems. Only those systems will be displayed who match the criteria.

<u>With value</u>

In this field additional search criteria must be entered if required by the filter definition.

Filter Examples:

- **All systems:** Shows all systems which can be processed by the user according to the user's rights.
- **Search for Systems by serial number in Field "with value":** Shows all systems related to a special serial number. This filter requires a value i.e. in this case the serial number.

System Overview

Showing 1 - 18 of 120 Page 1 Refresh

Service ID	Status	Network name	Cost center	Company	First name	Surname	Postal code	City
05789806	ordered		12345_2	Demo NICE Co...	Presentation2	Demo_User	67890	Abovevill
05789831	ordered		12345	Demo NICE Co...	Presentation	Demo_User	12345	Undervill
05807267	ordered		12345_1	Demo NICE Co...	Presentation2	Demo_User	12345	Undervill
05809418	ordered		12345	Demo NICE Co...	Presentation6	Demo_User	12345	Undervill
05814387	ordered		12345	Demo NICE Co...	Presentation9	Demo_User	67890	Abovevill
05814388	ordered		ND0000001	Demo NICE Co...	SpeckAlexander	Demo	12345	Undervill
05827056	ordered		12345	Demo NICE Co...	Presentation1	Demo_User	12345	Undervill
05827058	ordered		12345_1	Demo NICE Co...	Presentation2	Demo_User	12345	Undervill
05827060	ordered		12345_1	Demo NICE Co...	Presentation2	Demo_User	12345	Undervill
05827079	ordered		12345	Demo NICE Co...	Presentation1	Demo_User	12345	Undervill
05827874	ordered		12345	Demo NICE Co...	Presentation1	Demo_User	12345	Undervill
05827875	ordered		12345	Demo NICE Co...	Presentation1	Demo_User	12345	Undervill
05828217	ordered		12345	Demo NICE Co...	Presentation6	Demo_User	12345	Undervill
05829088	ordered		12345_2	Demo NICE Co...	Presentation8	Demo_User	67890	Abovevill
05829403	ordered		ND0000001	Demo NICE Co...	Presentation1	Demo_User	12345	Undervill
05830314	ordered		12345	Demo NICE Co...	Presentation1	Demo_User	12345	Undervill
05830315	ordered		12345	Demo NICE Co...	Presentation1	Demo_User	12345	Undervill

Fig. 110 Configuration Management - System Overview

The system list can be sorted by column. Just click on surname for example and the list will be sorted after surnames.
To refresh the panel click on the button *Refresh*.
With the arrow keys you can skip from one page to another.
Selecting a system will highlight the related row in magenta.

System Actions Panel

Actions
Function
Create system/component
Edit system
Edit Component
Download systems/components
Delete component
Repair component
Transfer component
Search for system/component
Lost component
Manage stocks
Manage stock threshold
Reports
Import system data
Activate system/component
Deactivate system/component
Print label

Fig. 111 Configuration Management - System Actions Panel

In the actions panel a list of functions for the processing of the selected system is displayed. The number of functions shown in the actions panel depends on several criteria like the status of the order, the role concept and the resultant access rights assigned to the user.

3.4.1 Action: Create system/component

The function “Create system/component” consists of the steps

- Select component from catalogue
- Select user and system
- Select action mode
- Select location
- Net/Config data
- Create CI

Select component from catalogue: You have to select the component to be created from thecatalogue. The fields “Component name” and “Component class”can be filled in order to find the desired component from a large number of components in the catalogue. After you selected the component go to the next step.

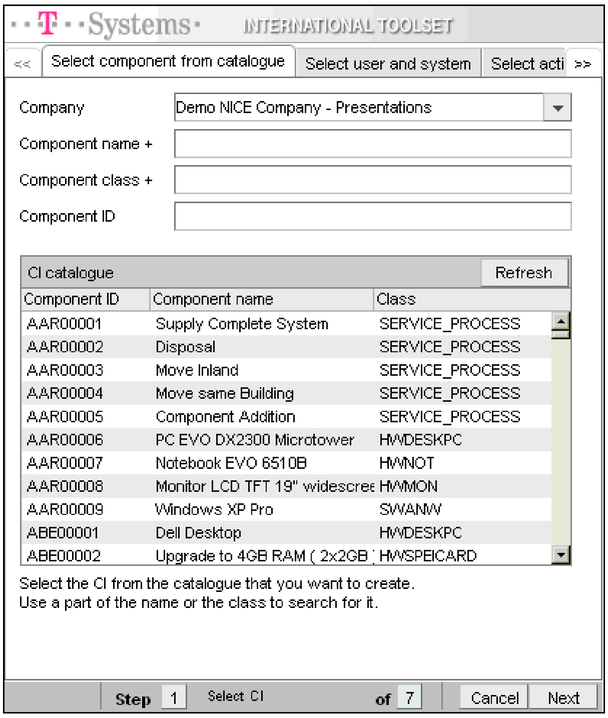


Fig.112 Configuration Management – Function “Create system/component” – select component

Fill component attributes: If there are attributes defined for the selected component in the step before, they will be shown in the table. Required attributes have to be filled to create the component.

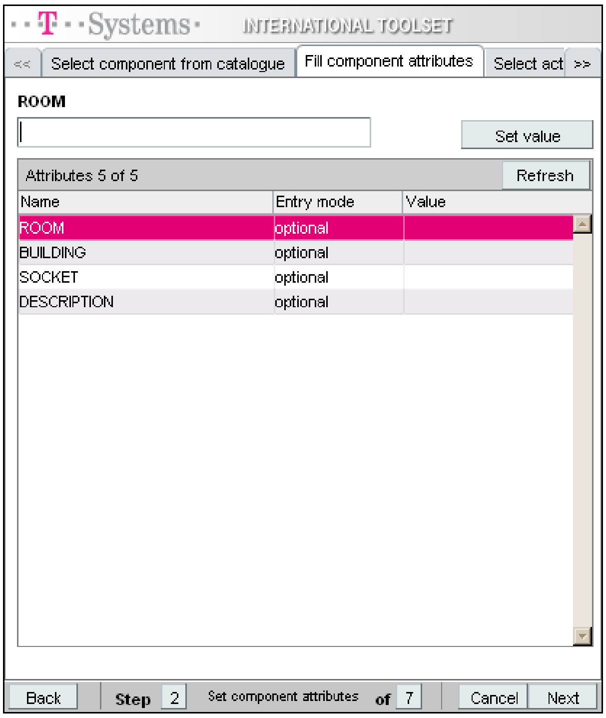


Fig. 113 Configuration Management – Function “Create system/component” – fill component attributes

Select action mode: You have to select whether you want to add the component to the existing CI or if you want to create a new one. According to the class and the CI type you might have no choice and the field is preselected and read-only. You cannot add more than one notebook or desktop pc to a Service ID, except to Service IDs that are stocks. Other components can be added or created as new Service ID. Additionally you should add the serial number and the customer component id.

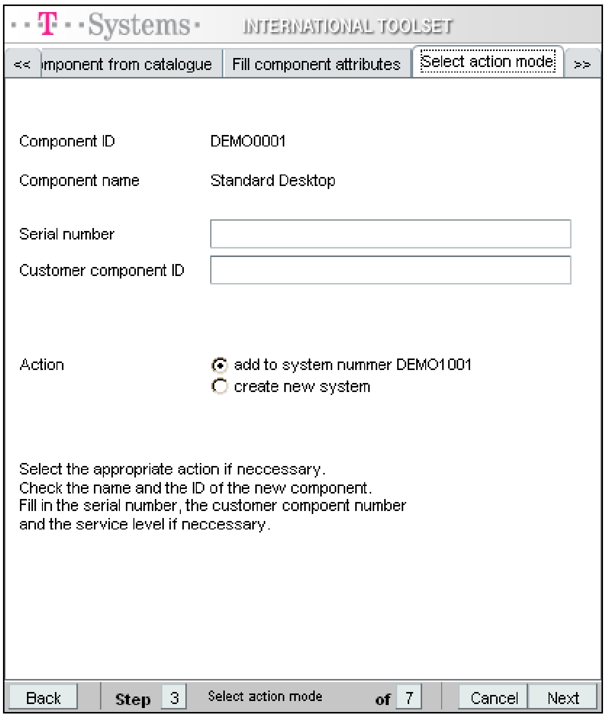


Fig. 114 Configuration Management – Function “Create system/component” – select action mode

Select user and system:

The user that uses the system has to be selected by Surname oder Firstname. The table shows all Service IDs that the user has according to the asset database. Select one from the table and go to the next step. There is a default-selection if you don't change it.

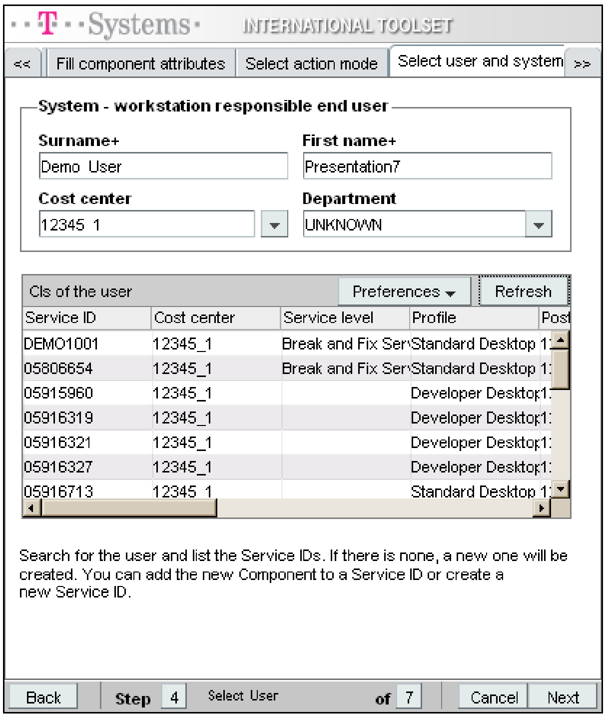


Fig. 115 Configuration Management – Function "Create system/component" – select user and system

Select location:

Only necessary when creating an new Service ID, otherwise greyed out. Find the location by searching in Postal code, Street or City with return. Select the service level that should apply for incidents. If you change the location data when adding the component to a Service ID no changes will be applied to the Service ID.

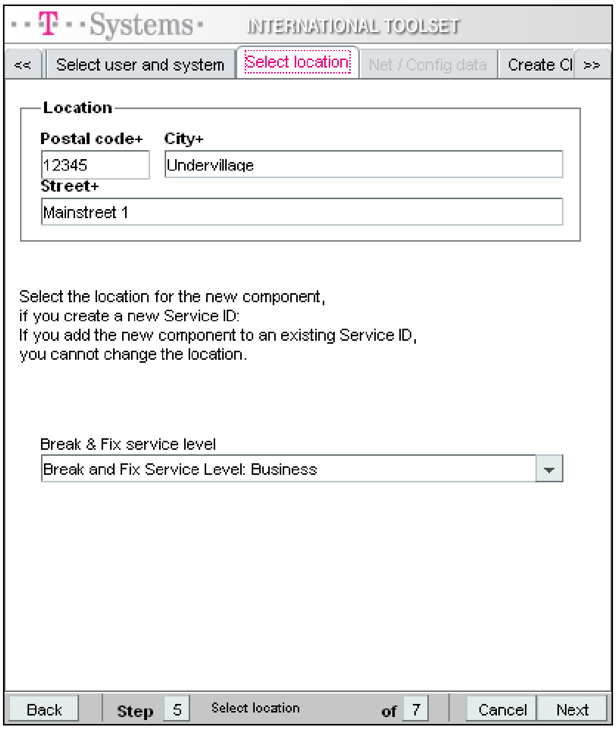


Fig. 116 Configuration Management – Function "Create system/component" – select location

Net/Config data: Only necessary when creating an new Service ID, otherwise greyed out. The data can be filled as needed. The network name should be filled in order to have a name for the Service ID.

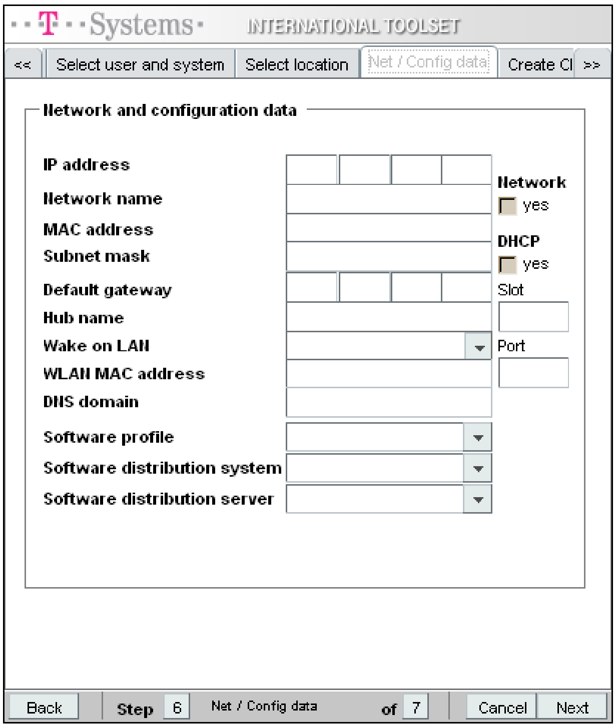


Fig. 117 Configuration Management – Function "Create system/component" – net / config data

Create CI: The selected component thau shall be added is shown with name and class which shall be added to the existing Service ID. Other components are shown in the table below. If you create a new Service ID the field Service ID and component are empty. You can click ether *Finish* or *save and next* to create the component. If you use the button *Finish*, the dialog is closed. If you use the button *save and next*, the focus is set to the first page in order to start the procedure once again.

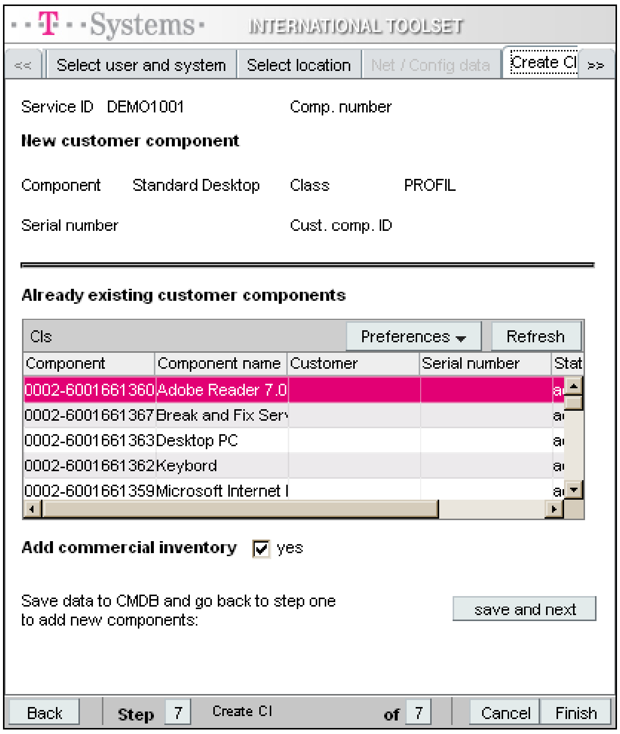


Fig. 118 Configuration Management – Function “Create system/component” – create CI

3.4.2 Action: Edit system

The function “Edit system” is displayed in a separate window. Here you can change all values of fields that are changeable (not read-only).

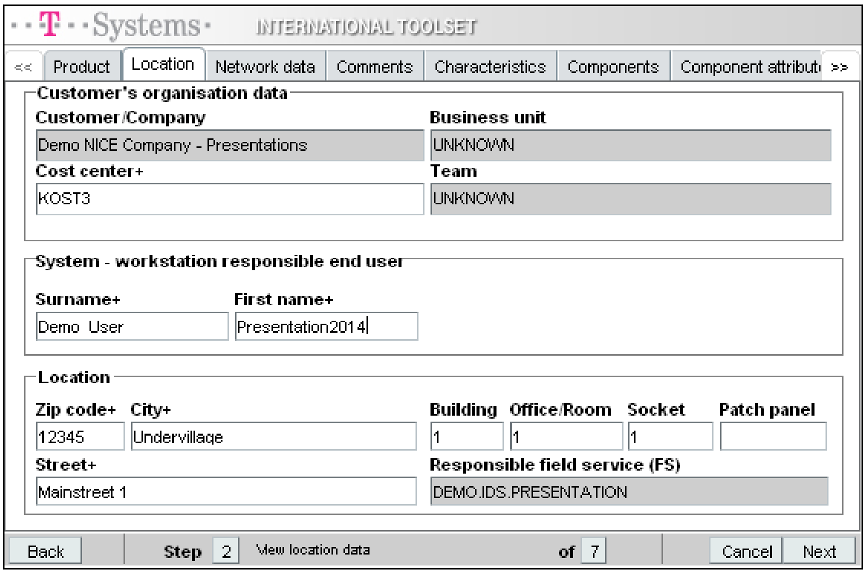


Fig. 119 Configuration Management – Function “Edit system”

To write the changes to the database press at least the button *Finish* on the last page.

3.4.3 Action: Edit component

The function “Edit components” is displayed in a separate window. A technician can edit some attributes of the components for the selected Service ID in this dialog. The function appears in the list when a service task containing a Service ID has been selected.
Choose one of the radio buttons “All” (default), “Hardware” or “Others” to restrict the displayed components in the list. Select a component from the list, fill in the required fields and click the *Save* button to save your changes in the database. Proceed with the next component from the list.

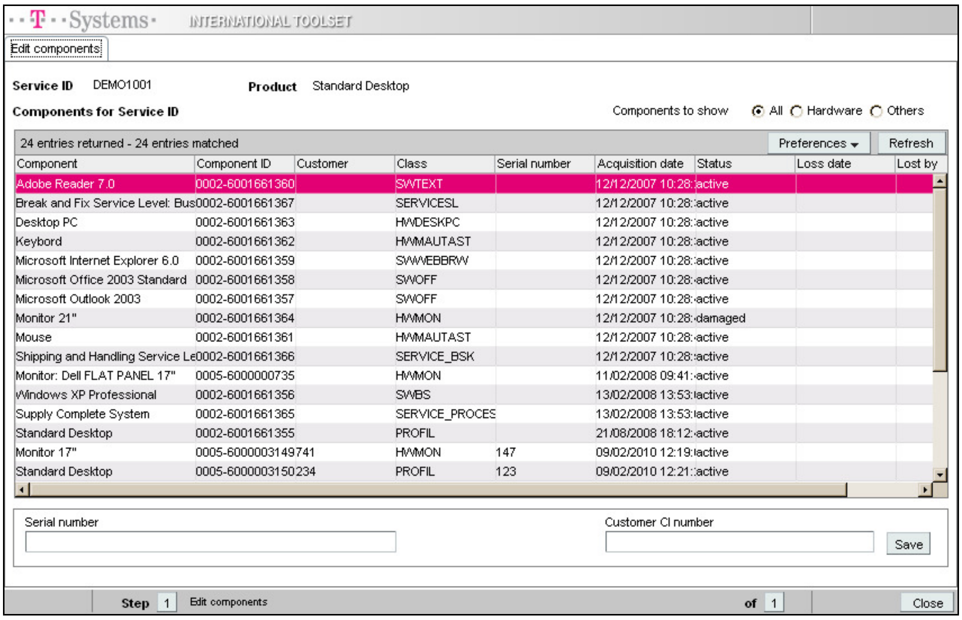


Fig. 120 Configuration Management – Function “Edit component”

3.4.4 Action: Edit component attributes

The function “Edit component attributes” is displayed in a separate window. A technician can edit additional component attributes for the selected Service ID in this dialog. The function appears in the list when a service task containing a Service ID has been selected.

Just mark the attribute, fill in the value and press *Save value*. To delete the value, enter $NULL$ in the field and press *Save value*. If the component attributes are required, you get an error and cannot delete the value.

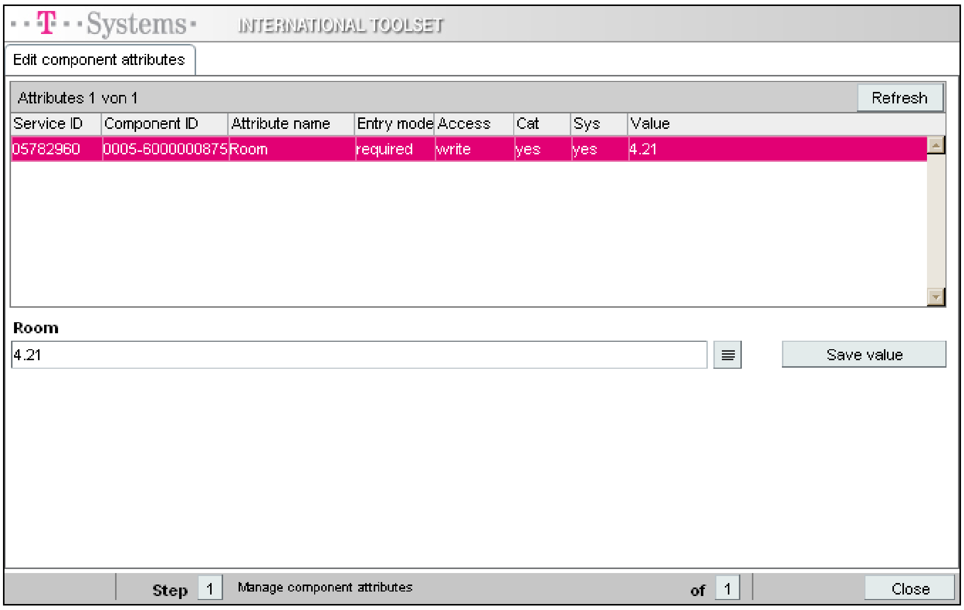


Fig. 121 Configuration Management – Function “Edit component attributes”

3.4.5 Action: Download systems/components

The function “Download system/component” is displayed in a separate window. Here you can download lists of systems that are related to one or all of the companies that you have permissions to. The handling is similar to that of all other downloads in webSRM.

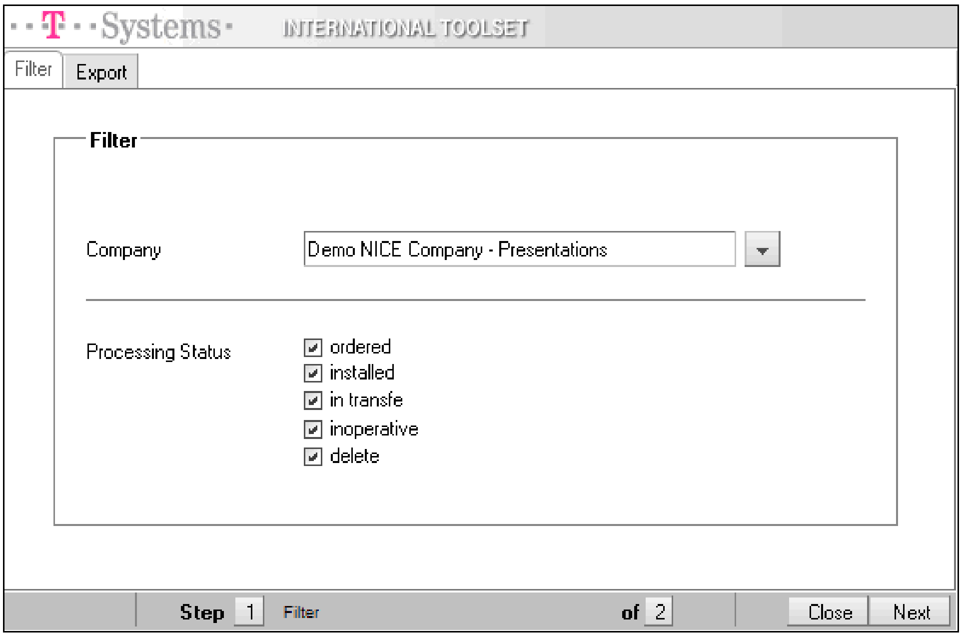


Fig. 122 Configuration Management – Function “Download system/component”

3.4.6 Action: Deactivate system/component

The function “Deactivate system/component” is displayed in a separate window. To deactivate a component you press the button *Deactivate component* after marking the component that should be deactivated.

For deactivating the complete system press the button *Deactivate complete system*. Then all active components will be deactivated and the system gets the status inactive.

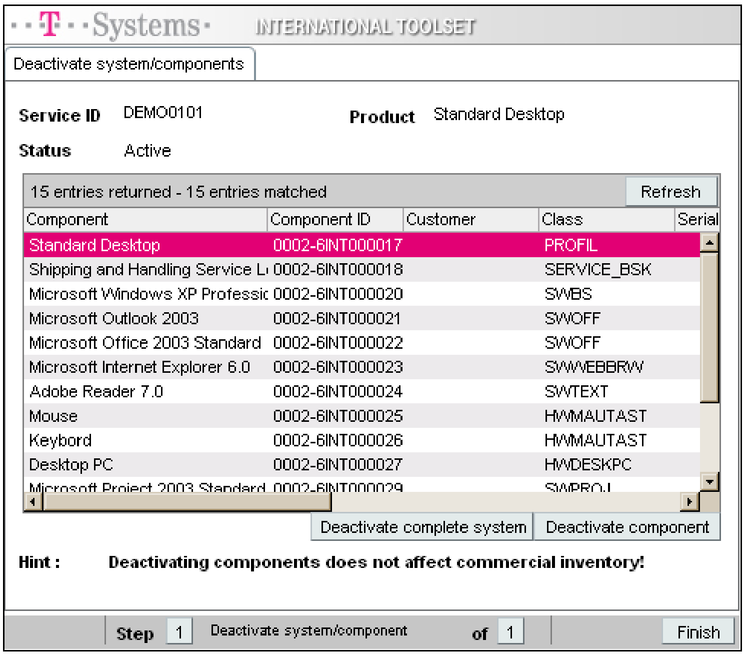


Fig. 123 Configuration Management – Function “Deactivate system/component”

3.4.7 Action: Activate system/component

The function “Activate system/component” is displayed in a separate window. To activate a component you press the button *Reactivate component* after marking the component that should be reactivated. If the system is inactive, it will be also reactivated.

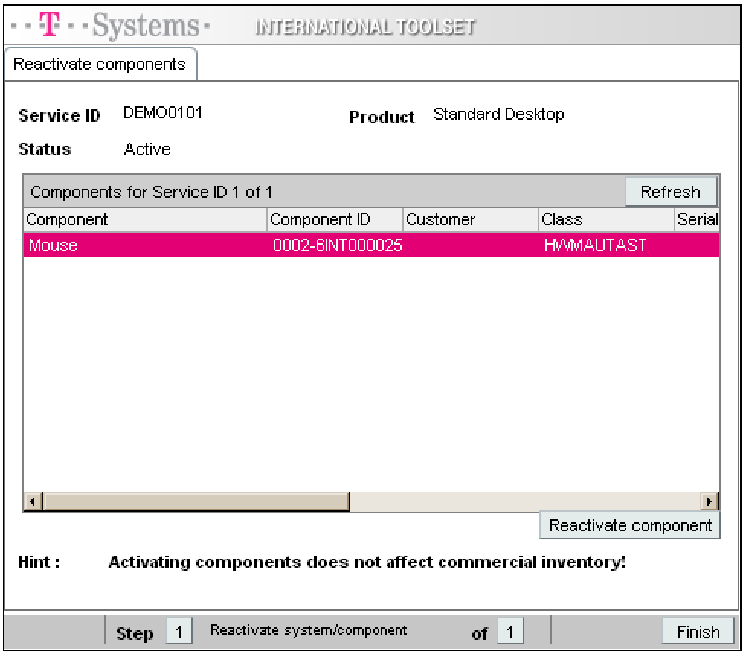


Fig. 124 Configuration Management – Function “Activate system/component”

3.4.8 Action: Delete component

The function “Delete component” is displayed in a separate window. To delete a component you press the button *Delete* after marking the component that should be deleted.

IMPORTANT: You cannot undo this action!

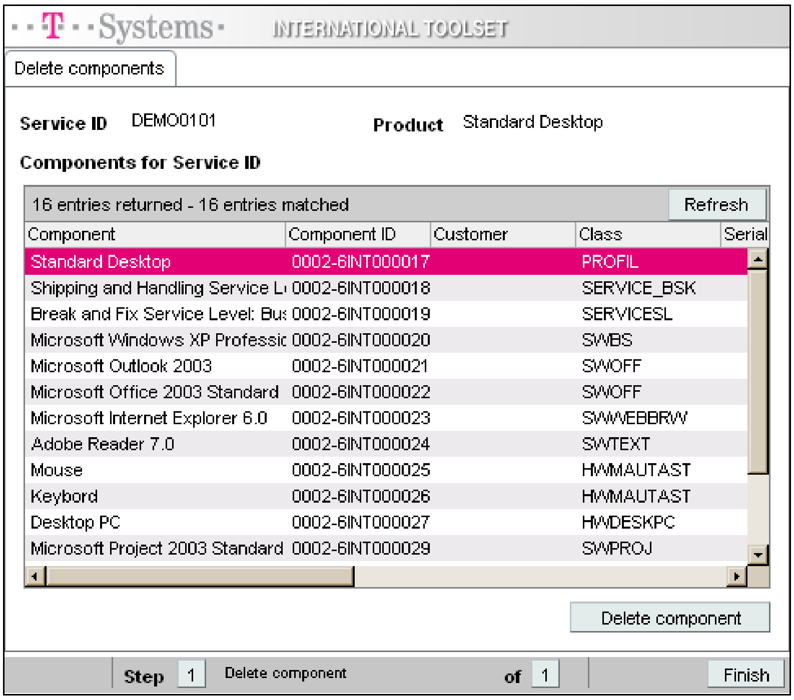


Fig. 125 Configuration Management – Function “Delete component”

3.4.9 Action: Repair component

The function “Repair component” is displayed in a separate window. To set components in stocks for example active after they have been repaired you mark the defect component and press the button *Repair*.

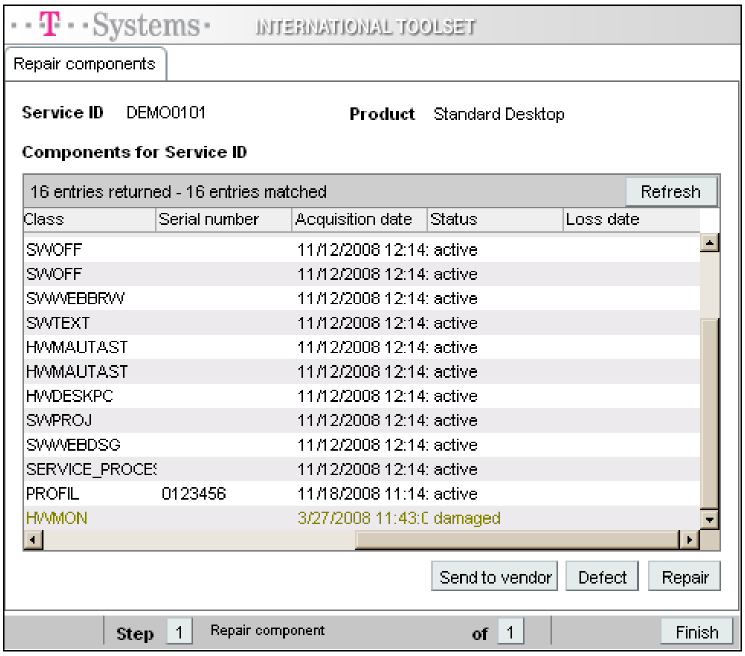


Fig. 126 Configuration Management – Function “Repair component”

3.4.10 Action: Transfer component

The function “Transfer component” is displayed in a separate window. Here you can transfer components from one Service ID to another. You can transfer them in both directions by using the button “<” or “>” between the tables.
IMPORTANT: You should avoid transferring components from one company to another.

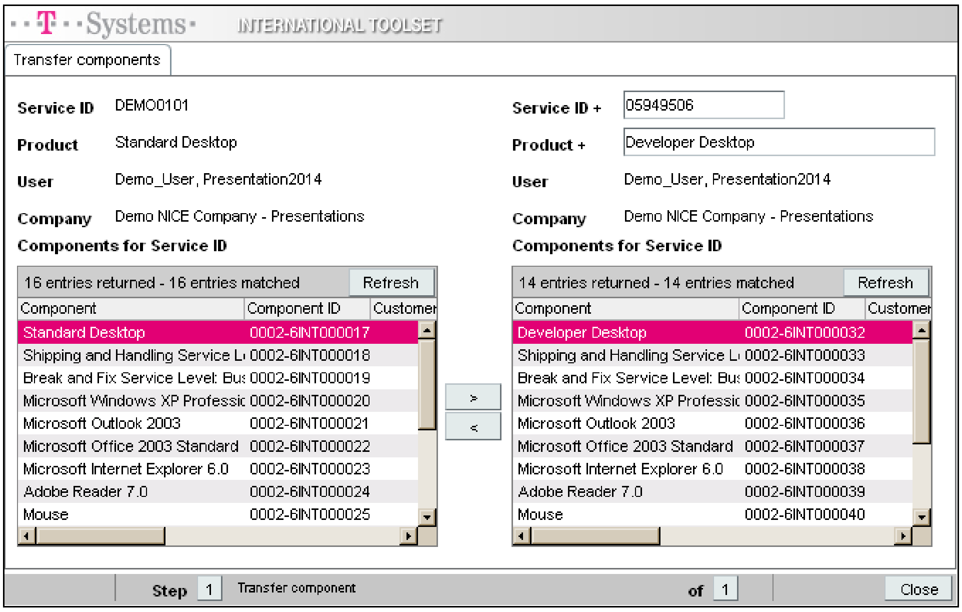


Fig. 127 Configuration Management – Function “Transfer component”

3.4.11 Action: Search for system/component

The function “Search for system/component” is displayed in a separate window. In this dialog you can search for a configuration item by several pre-defined criteria.

The search criteria are (pre-defined):

- CI ID / Asset ID
- Serial number
- Customer equipment ID
- Service ID

For each criterion a particular value is required in the field “Search value”, e.g. a serial number. Click on the button *Search* to start the request. If the configuration item was found, the dialog “Show related system” will be displayed.

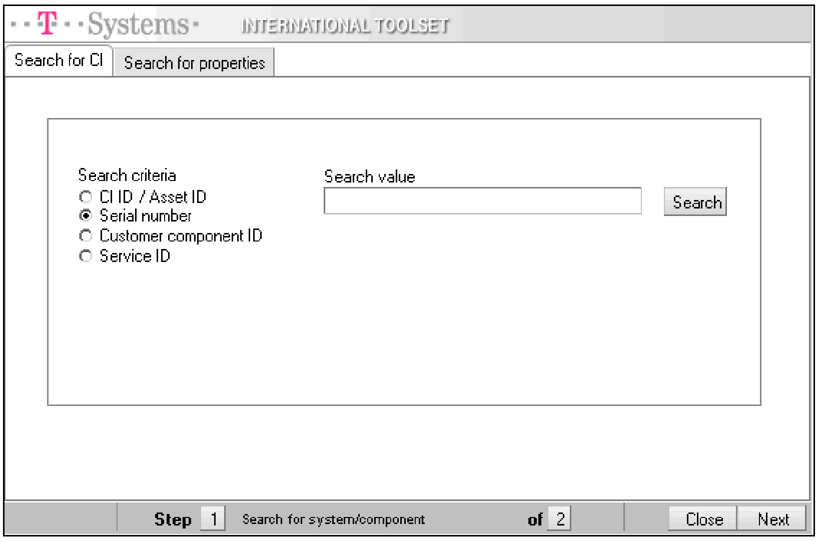


Fig. 128 Configuration Management – Function “Search for system/component”

Dazu sind folgende Schritte durchzuführen:
On the second page systems can be searched by attributes. The following steps describe the initialisation of the attribute search:
1. Select a company
2. Select a product
3. (optional) The search result can be restricted by adding attribute conditions. It is possible to combine more than one attribute condition. Attribute conditions are combines by using the logical joins AND and OR. To add an attribute condition the following steps are necessary:
3.1 Select attribute
3.2 Enter attribute value
3.3 Select logical join (AND, OR)
3.4 Press button *ADD Condition* to add the condition
For different attribute conditions repeat the step 3.1-3.4 above.
Added attribute conditions can be removed after selection at the table by pressing the button *REMOVE Condition*.

4. Start search by pressing the button *Search*

The button *Reset* resets the complete search condition.

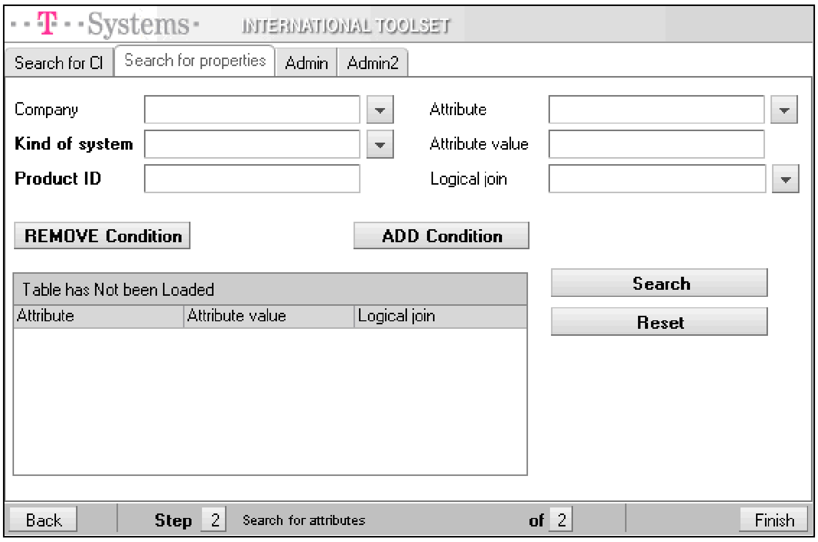


Fig. 129 Configuration Management – Function “Search for attributes”

3.4.12 Action: Lost component

The function “Lost component” is displayed in a separate window. If a component is lost, you can mark it, set the date when it was lost and press the button *Lost*.

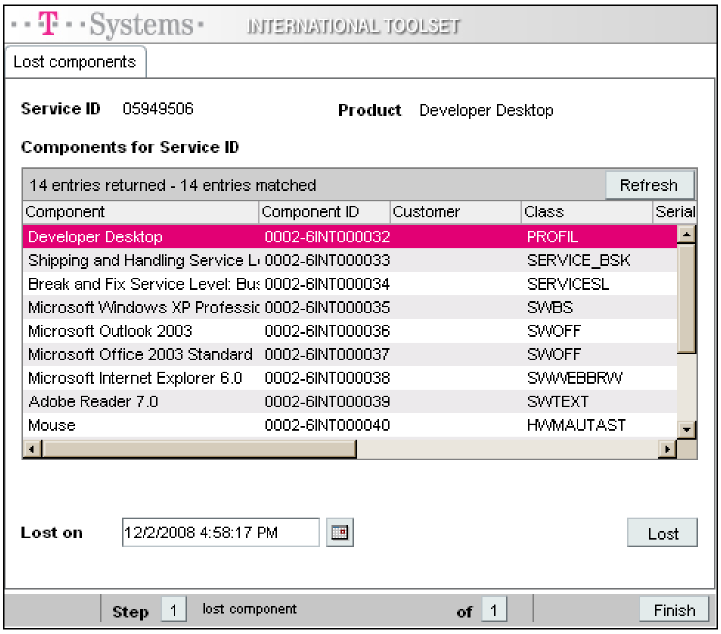


Fig. 130 Configuration Management – Function “Lost component”

3.4.13 Action: Manage stocks

On the stock setup page the service ID can be renamed. The stock can be also restricted to the set location. In this case the stock is only available for actions on systems at the same location.
To create a stock close the dialog by using the button *Finish* on the last page.
IMPORTANT: You can not undo this action!

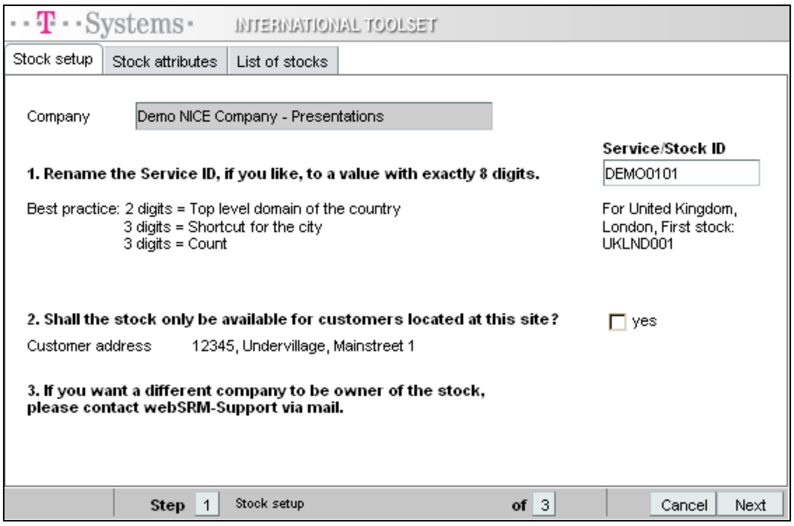


Fig. 131 Configuration Management – Function “Manage stocks” – stock setup

The following stock attribute could be set:

- Spare part stock (used for the function “Update CMDB - swap”)
- Fullfillment stock (used for the functions “Update CMDB – Install/Add” and “Update CMDB – Dispose”)
- Fault report (used for the function “Update CMDB - swap”)

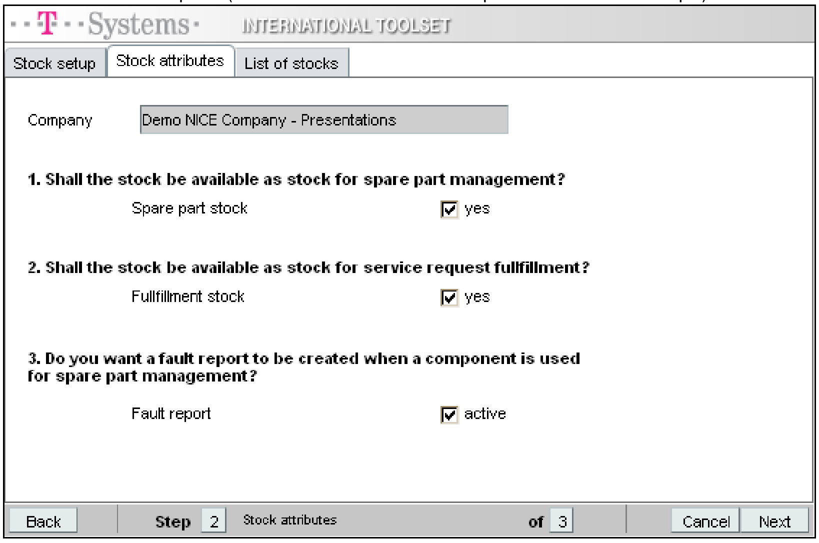


Fig. 132 Configuration Management – Function “Manage stocks” – stock attributes

On the page “List of stock” are all stocks of the company of the selected system/stock displayed.

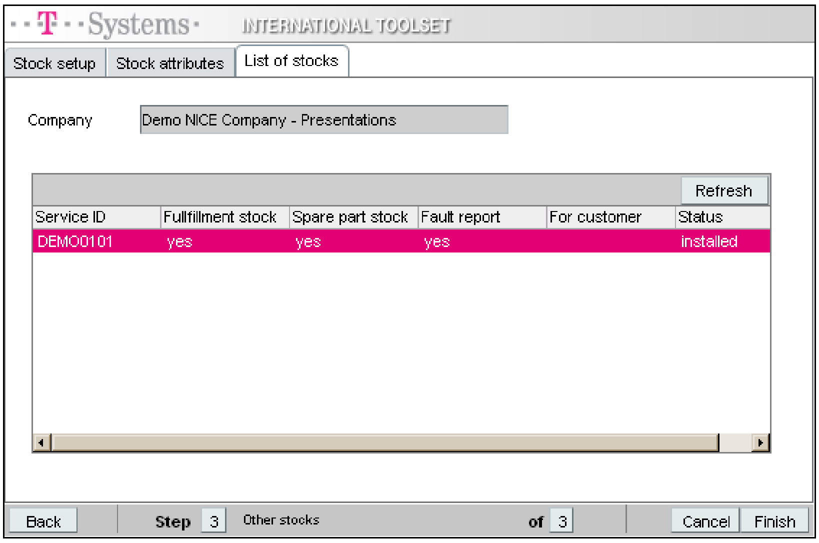


Fig. 133 Configuration Management – Function “Manage stocks” – list of stocks

3.4.14 Action: Print label

With this action labels for components or systems (Service IDs) can be printed on any usual A4 letter format with a laser printer.
A PDF document will be generated and shown in the browser when pressing the *Componentlabel* or the *Service ID label* button.
Individual label formats can be edited using the *Add*, *Save* or *Remove* button. The formats can be reused for the next print label action.

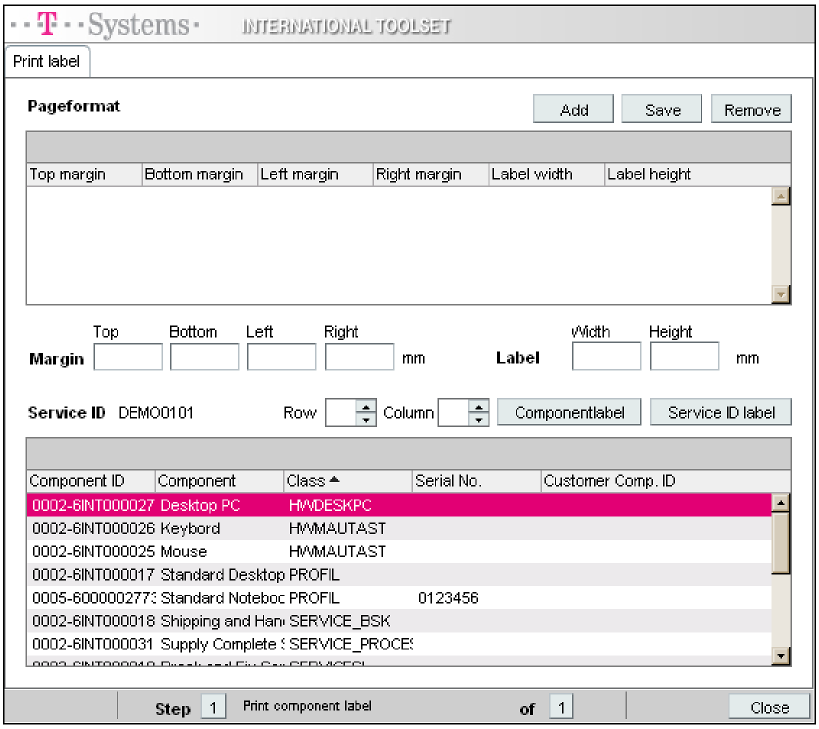


Fig. 134 Configuration Management – Function “Print label”

3.4.15 Action: Import system data

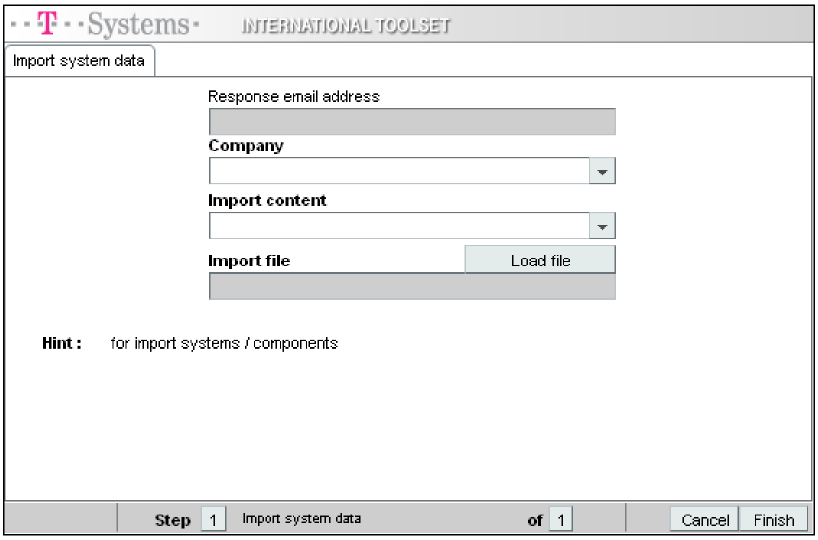
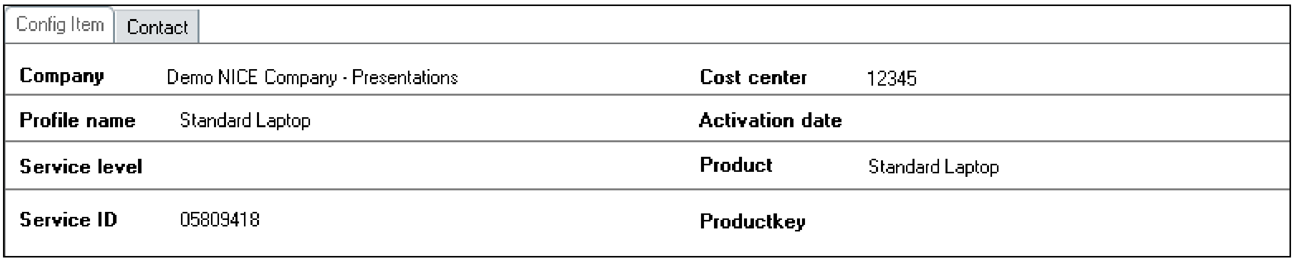


Fig. 135 Configuration Management – Function “Import system data”

3.4.16 System Info Tab Panel

<u>Tab: Config Item</u>

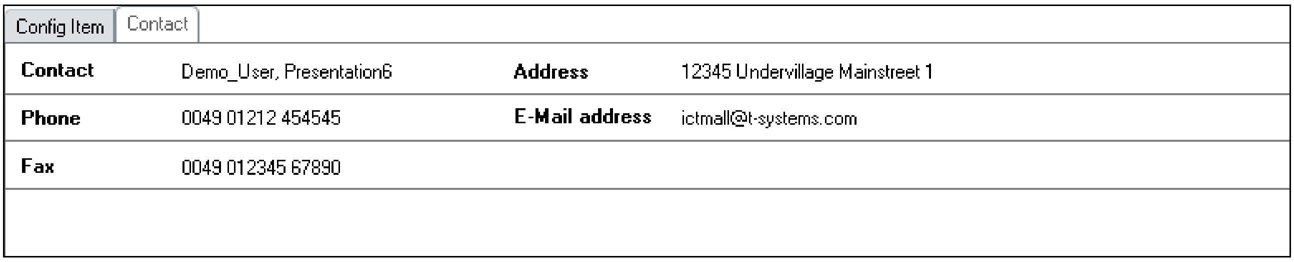


Company	Demo NICE Company - Presentations	**Cost center**	12345
Profile name	Standard Laptop	**Activation date**	
Service level		**Product**	Standard Laptop
Service ID	05809418	**Productkey**	

Fig. 136 Configuration Management - System Info Tab: Config Item

The tab “Config Item” shows the profile name, the activation date, the service level, the product name, the service ID and the product key for the selected system.

<u>Tab: Contact</u>



Contact	Demo_User, Presentation6	**Address**	12345 Undervillage Mainstreet 1
Phone	0049 01212 454545	**E-Mail address**	ictmall@t-systems.com
Fax	0049 012345 67890		

Fig. 137 Configuration Management - System Info Tab: Contact

The tab “Contact” shows the contact information and the address of the contact.

<u>System Components Area</u>

Component	Customer	Serial number
Mouse	6	7
Monitor 19''		
Laptop Bag		
Standard Lapt...		

Fig. 138 Configuration Management – System Components Area

In this area the components of the related system are displayed.

3.5 Incident Management

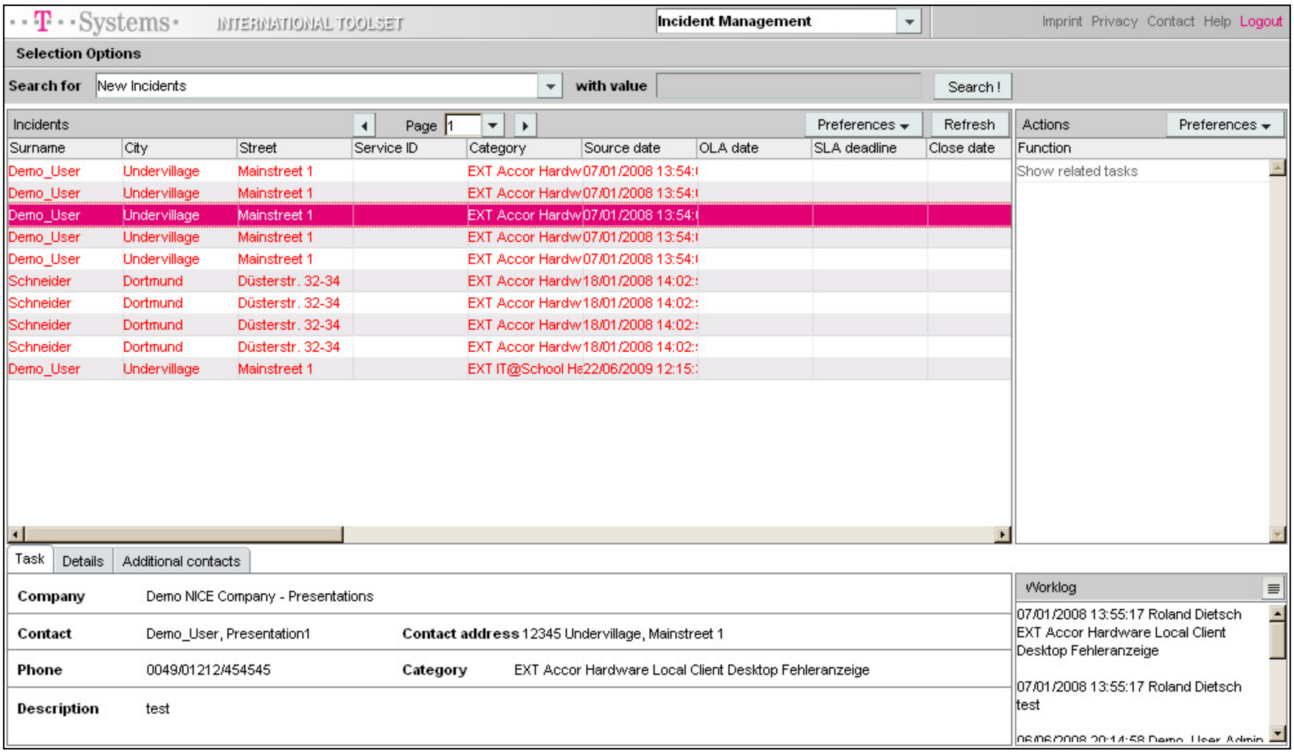


Fig.139 Incident Management Front-end

The Incident Management consists of

- the selection option panel (at the top of the page)
- the incident overview (in the middle of the page)
- the incident action panel (on the right frame of the page)
- the detailed information of the selected incident (on the bottom of the page)

There are all new incidents displayed which correspond to the permissions of the current user. After selection of an incident the details at the bottom are filled and the functions table on the right is refreshed.

This module can only be used as an overview for incidents. There are no possibilities to work on an incident ticket.

Selection options panel

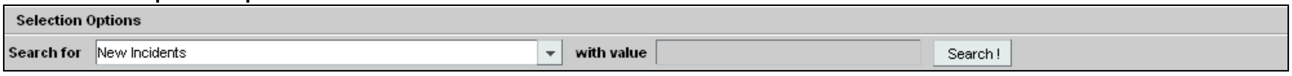


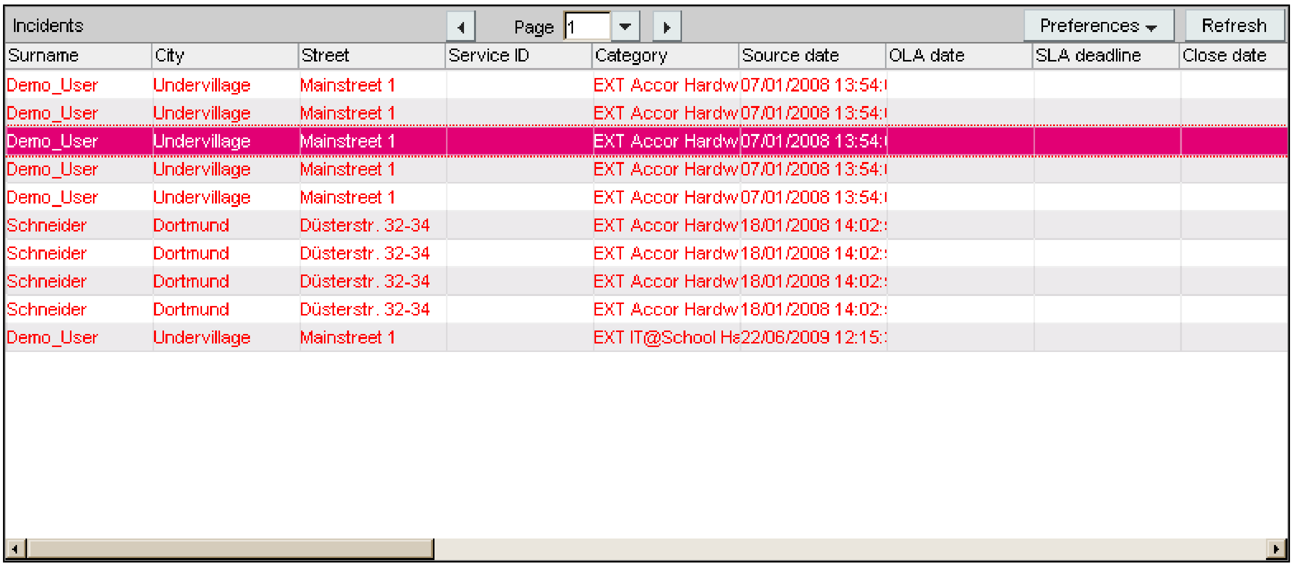
Fig.140 Incident Management – Selection options panel

You can reduce the number of incidents displayed in the incident overview by using pre-defined filters. A filter consists of the filter name ("search for") and a value ("with value") as an additional search criterion, if necessary. If no additional value is required for the filter the field "with value" is write-protected.

<u>Search for</u>
Here you can select a pre-defined filter to reduce the number of contracts and/or additional postings. Only those contracts or additional postings will be displayed which match the criteria.

<u>With value</u>
In this field additional search criteria must be entered if required by the filter definition.

Incident overview



Surname	City	Street	Service ID	Category	Source date	OLA date	SLA deadline	Close date
Demo_User	Undervillage	Mainstreet 1		EXT Accor Hardw	07/01/2008 13:54:			
Demo_User	Undervillage	Mainstreet 1		EXT Accor Hardw	07/01/2008 13:54:			
Demo_User	Undervillage	Mainstreet 1		EXT Accor Hardw	07/01/2008 13:54:			
Demo_User	Undervillage	Mainstreet 1		EXT Accor Hardw	07/01/2008 13:54:			
Demo_User	Undervillage	Mainstreet 1		EXT Accor Hardw	07/01/2008 13:54:			
Schneider	Dortmund	Düsterstr. 32-34		EXT Accor Hardw	18/01/2008 14:02:			
Schneider	Dortmund	Düsterstr. 32-34		EXT Accor Hardw	18/01/2008 14:02:			
Schneider	Dortmund	Düsterstr. 32-34		EXT Accor Hardw	18/01/2008 14:02:			
Schneider	Dortmund	Düsterstr. 32-34		EXT Accor Hardw	18/01/2008 14:02:			
Demo_User	Undervillage	Mainstreet 1		EXT IT@School Ha	22/06/2009 12:15:			

Fig.141 Incident Management – Incident Overview

3.5.1 Action: Show related tasks

This link displays the Task Management using a search filter to display the appropriate tasks to the selected incident.

3.5.2 Action: Show history

This function displays the incident history in a new dialog.

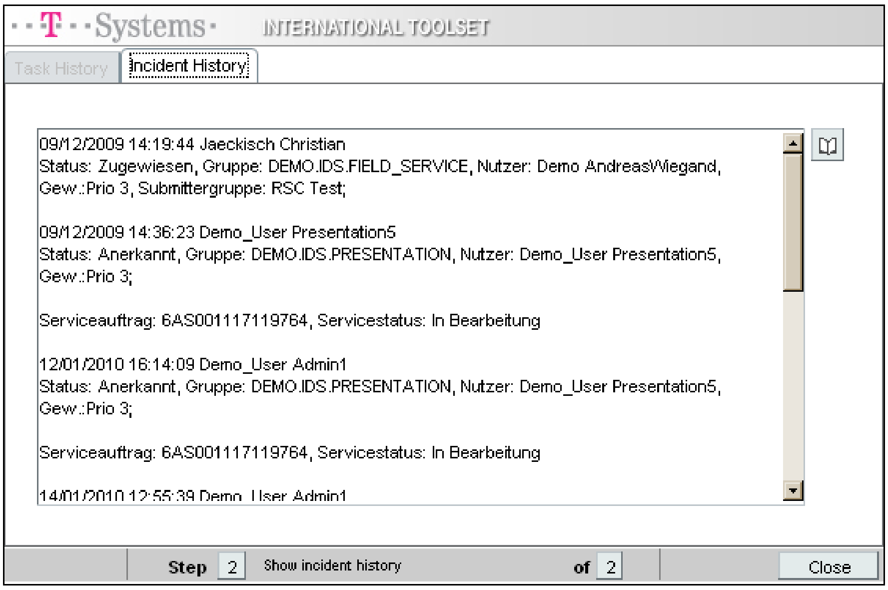


Fig. 142 Incident Management – Show history

3.6 LBU Administration

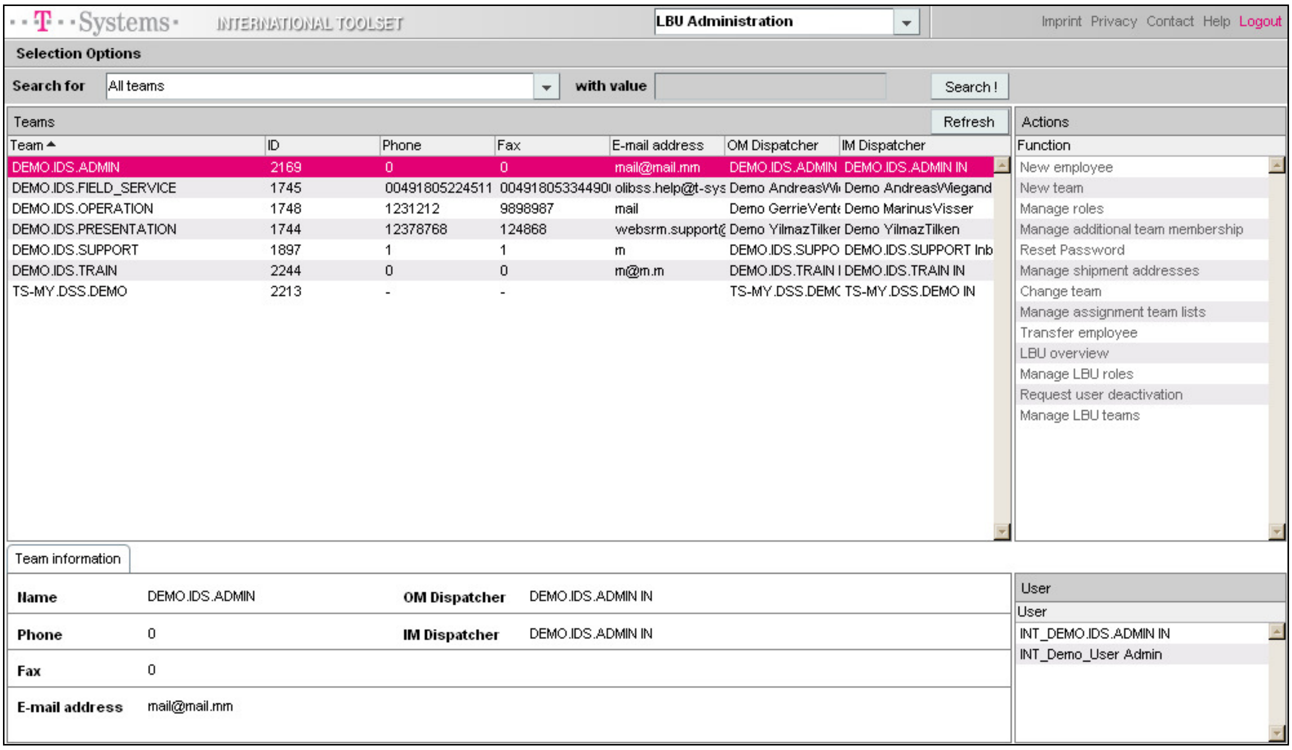


Fig. 143 LBU Administration Frontend

The LBU Administration consists of

- the selection option panel (at the top of the page)
- the team overview (in the middle of the page)
- the team action panel (on the right frame of the page)
- the detailed information of the selected team (on the bottom of the page)

The team overview shows all teams which can be managed by the user according to his configured permissions. By Default the first team is selected and the detailed information about the team is shown in the detail pane. The local business unit action panel shows all possible actions which can be performed on the selected team.
Using the Local Business Unit Administration the user can create and manage employees and teams for his permissions. He is able to assign or transfer employees to his teams and give employees different roles.

Selection Options Panel

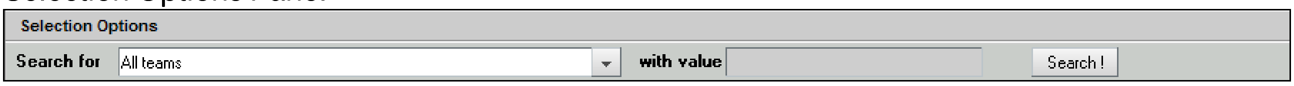


Fig. 144 LBU Administration Frontend - Selection Options Panel

You can reduce the number of teams displayed in the team overview by using pre-defined filters. A filter consists of the filter name ("search for") and a value ("with value") as an additional search criterion, if necessary. If no additional value is required for the filter the field "with value" is write-protected.

<u>Search for</u>

Here you can select a pre-defined filter to reduce the number of teams. Only those teams will be displayed who match the criteria.

<u>With value</u>

In this field additional search criteria must be entered if required by the filter definition.

Filter Examples:

- **All teams:** Shows all teams which can be processed by the user according to the user's rights.
- **Search for team by name in Field "with value":** Shows all teams related to the value. This filter requires a value i.e. in this case the name of a team.

Team Overview

Teams — Refresh

Team▲	ID	Phone	Fax	E-mail address	OM Dispatcher	IM Dispatcher
DEMO.IDS.ADMIN	2169	0	0	mail@mail.mm	DEMO.IDS.AD...	DEMO.IDS.ADMIN IN
DEMO.IDS.FIELD_SERVICE	1745	00491805224511	0049180533449...	olibss.help@t-sy...	Demo Andreas...	Demo AndreasWiegand
DEMO.IDS.OPERATION	1748	1231212	9898987	mail	Demo GerrieVen...	Demo MarinusVisser
DEMO.IDS.PRESENTATION	1744	12378768	124868	websrm.support...	Demo YilmazTilk...	Demo YilmazTilken
DEMO.IDS.SUPPORT	1897	1	1	m	DEMO.IDS.SUP...	DEMO.IDS.SUPPORT In...
DEMO.IDS.TRAIN	2244	0	0	m@m.m	DEMO.IDS.TRA...	DEMO.IDS.TRAIN IN

Fig. 145 LBU Administration - Team Overview

The team list can be sorted by column. Just click on the team for example and the list will be sorted after teams.
To refresh the panel click on the button *Refresh*.
With the arrow keys you can skip from one page to another.
Selecting a team will highlight the related row in magenta.

Team Actions Panel

Actions

Function
New employee
New team
Manage roles
Manage additional team membership
Reset Password
Manage shipment addresses
Change team
Manage assignment team lists
Transfer employee
LBU overview
Request user deactivation

Fig. 146 LBU Administration - Team Actions Panel

In the actions panel a list of functions for the processing of the selected team is displayed. The number of functions shown in the actions panel depends on several criteria like the status of the order, the role concept and the resultant access rights assigned to the user.

3.6.1 Action: New employee

To enter data for a new employee of a team, a new window opens. The dialog consists of the following steps:

- User information
- Org. unit
- Generate account

User information: On this page the user has to enter all needed data for creating a new user account. All Fields with a bold label are required Fields.

Org. unit: On the second Page the user enters all Information about the Org. Unit the new employee works for. Company name and Team are set by default values, depending on the selected team in the team overview, but can be changed. The country and address can be chosen from combo boxes which contain the data for the selected company. All Fields with a bold label are required Fields. Please note that by assigning the employee to a team, the team automatically inherits all roles from the employee and the Delivery Manager now can assign this team to a certain combination of required service module and company.

Generate account: Shows the generated login name which will be used for the new employee. Login name and password are the same. The login name can be overwritten before saving, but cannot be changed after saving.

The employee is created by clicking the *Finish* button.

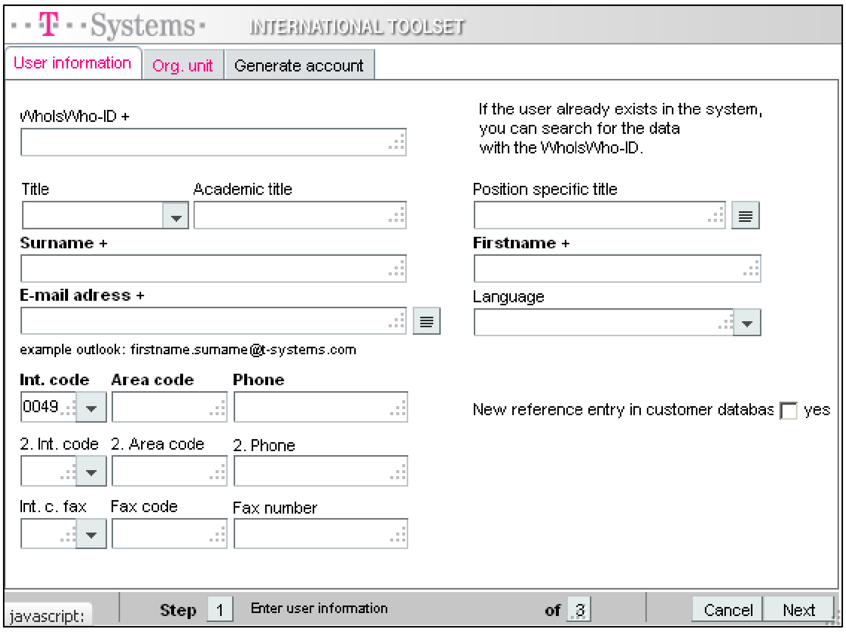


Fig. 147 LBU Administration – Function “New employee”

3.6.2 Action: New team

The function “New team” is displayed in a separate window. In this dialog you can create a new team which can afterwards work in webSRM. Because a new team is created, the selected team in the team list does not matter.

To create a new team just fill in all needed data as Team name, Phone number, Fax number and E-Mail address. The workflow will compose the team name by appending the three levels separated by a dot.
On the second page the naming convention is displayed.

The team can be configured for Cosima transfer which means that an email with a configuration request will be automatically been sent. New teams are always created in capital letters. Furthermore an order INBOX identifier and an incident INBOX identifier are automatically created.
The entered data is saved by clicking the *Save data* button.

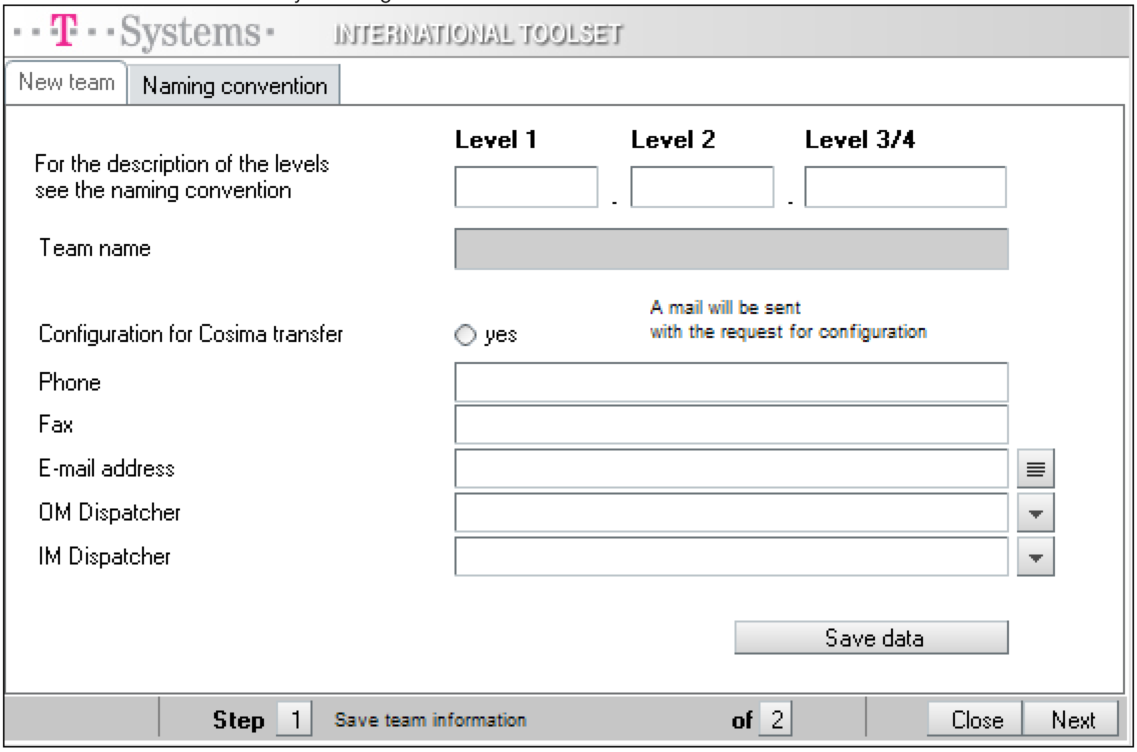


Fig. 148 LBU Administration – Function "New team"

3.6.3 Action: Manage roles

The function "Manage roles" is displayed in a new window and is divided into two lists. The left list shows all employees for the selected team in the team overview. The right list shows all roles for the selected employee.

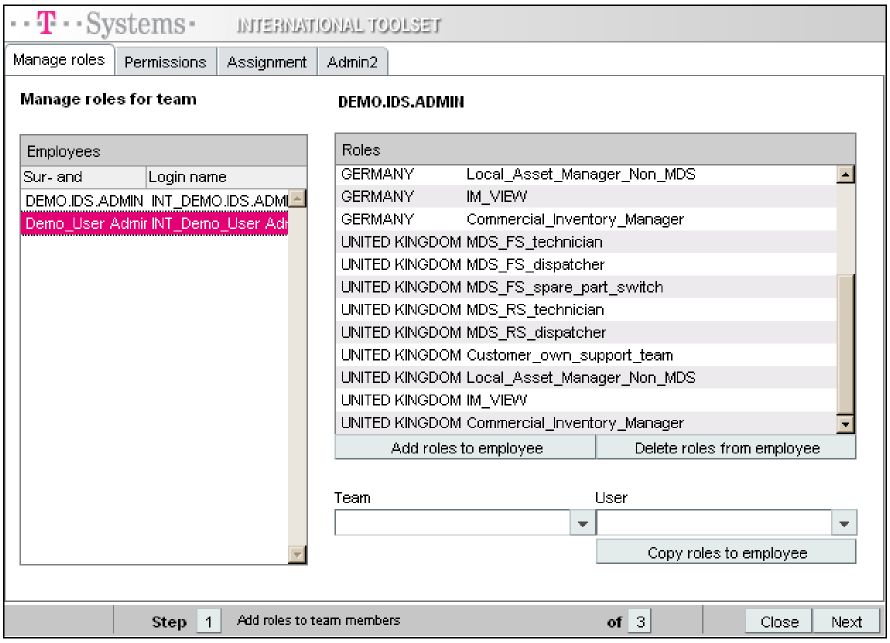


Fig. 149 LBU Administration – Function “Manage roles”

By clicking the *Add roles to employee* button another Dialog is opened. To map a certain Role to an employee the user has to select a module from the list and a country from the country combo box. The mapping is saved by clicking the *Add selected roles to employee* button. It is possible to select more than one module at a time by using the *shift* or *ctrl* key. Please keep in mind that the employee has to be assigned to a team. The team than is assigned to a requested combination of service module and country, not the employee himself. The team inherits all roles from all assigned employees.

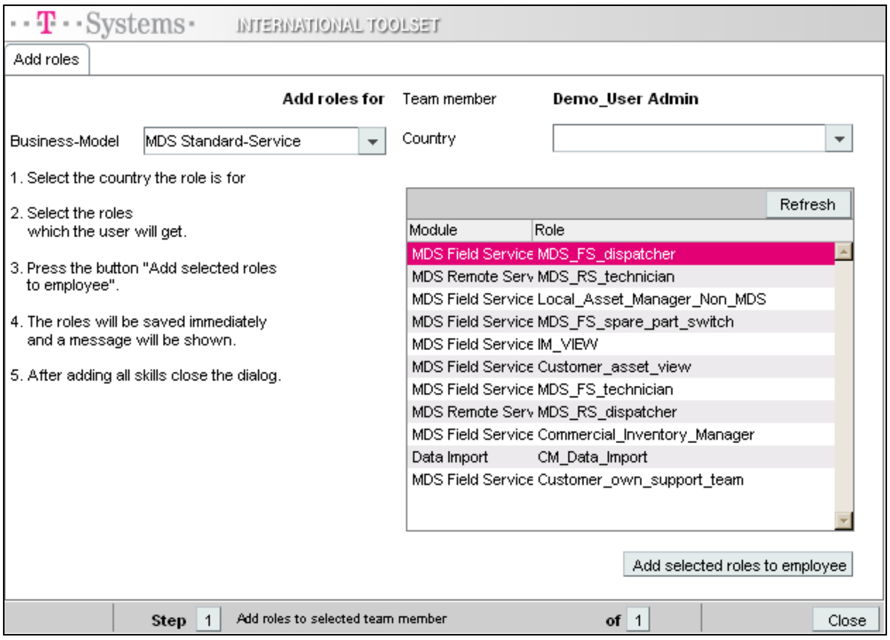


Fig. 150 LBU Administration – Function “Manage roles” – add roles

By selecting already mapped roles from the roles list and clicking the *Delete roles from employee* button, the selected roles are deleted.

To copy roles from one user to another, use the following steps:

- Select the user who got the roles you want to copy.
- Mark the roles which you want to copy

- Select the team of the destination user and the user by using the menus below the roles table
- Click the button *Copy roles to employee* to copy the roles to the selected user

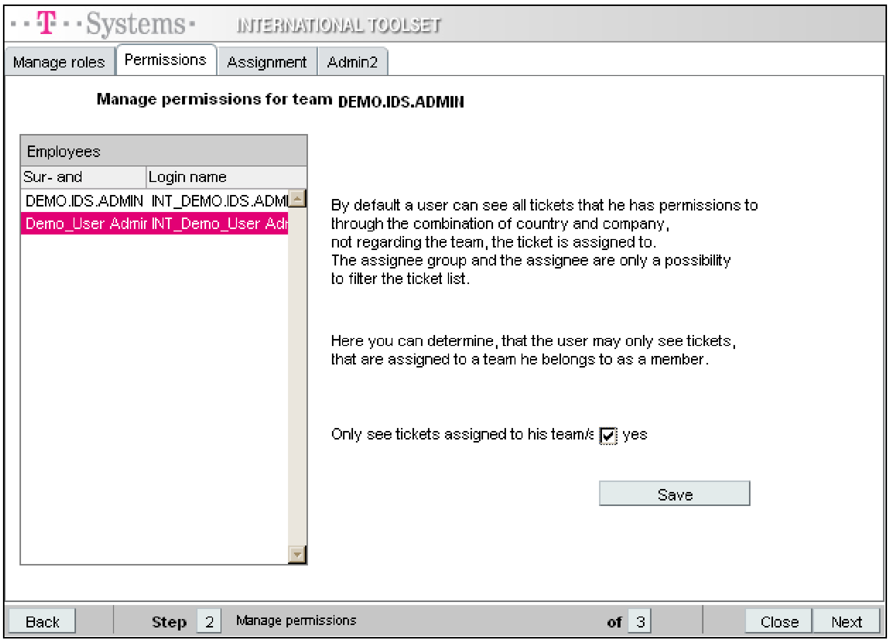


Fig.151 LBU Administration – Function “Manage roles” - permissions

Regarding the permissions you can determine whether the selected user may see all tickets he has permissions to by company and country, which is the default, or the user may only see tickets assigned to the team/s he belongs to.

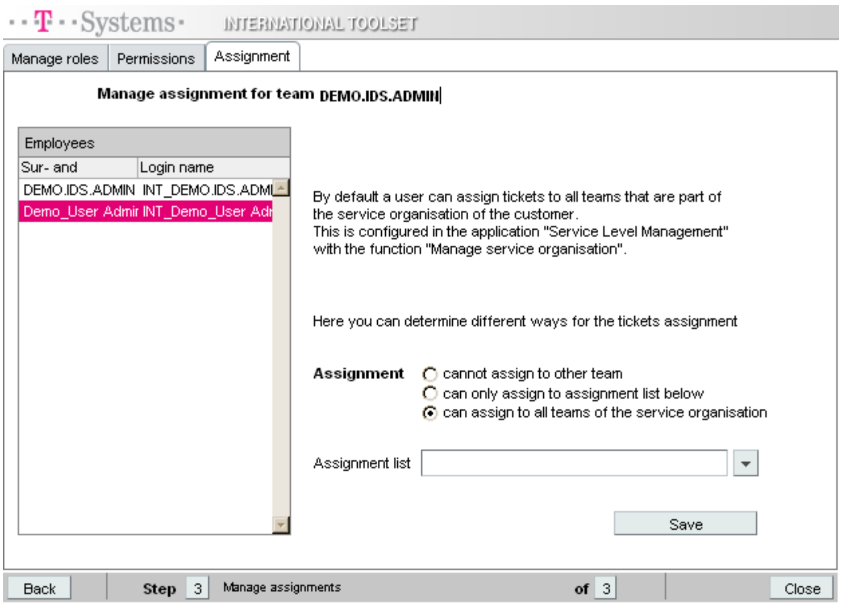


Fig.152 LBU Administration – Function “Manage roles” - assignment

For assignment purposes you can restrict the selected user to assign to no other team,
or to assign to an assignment list which must be defined with the function “Manage assignment team list”,
or to assign to all teams of the service organisations, which is default.

3.6.4 Action: Manage additional team membership

The function “Manage secondary team membership” opens a new dialog in which a user can be assigned to one or more additional teams.
By mapping users to one or more secondary teams, the user gets additional permissions according to his roles and according to the engagement of the mapped teams in any service organisation.

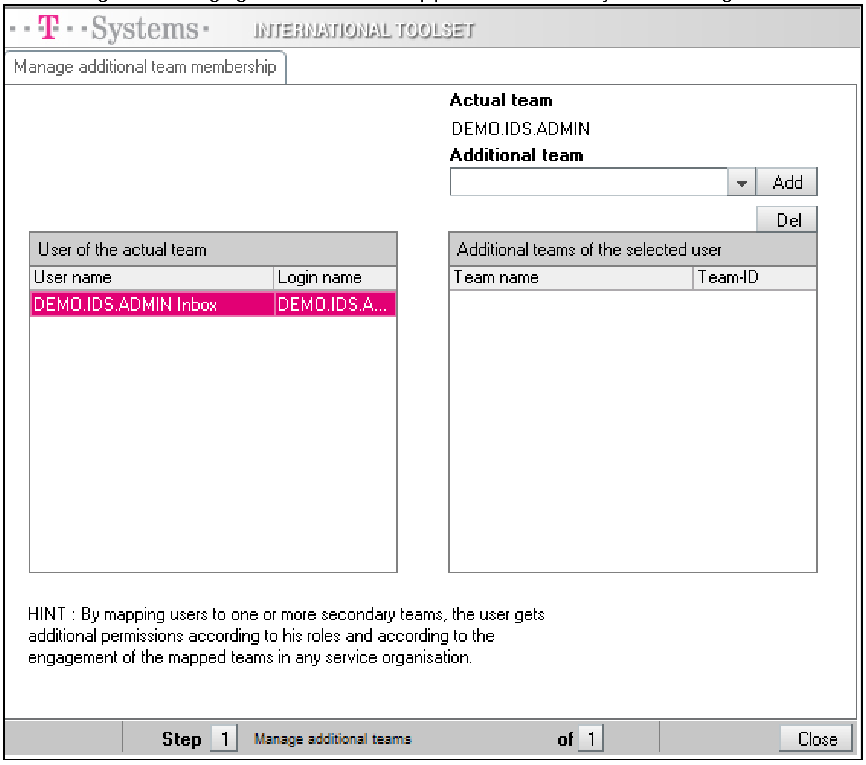


Fig. 153 LBU Administration – Function “Manage additional team membership”

3.6.5 Action: Reset password

The function “Reset password” opens a new dialog in which the LBU administrator can set the password of users of his teams to a new value. The default value is the login name of the selected user.

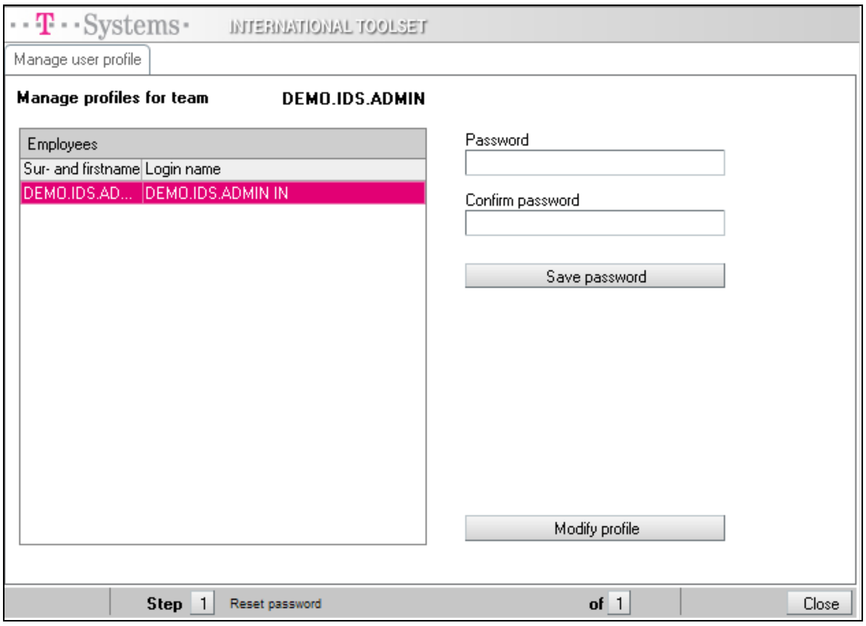


Fig. 154 LBU Administration – Function “Reset password”

With the button *Modify profile* the “Modify my profile” dialog of the selected user is opened. All profile data will be saved if the dialog is closed by using the button *Finish*.

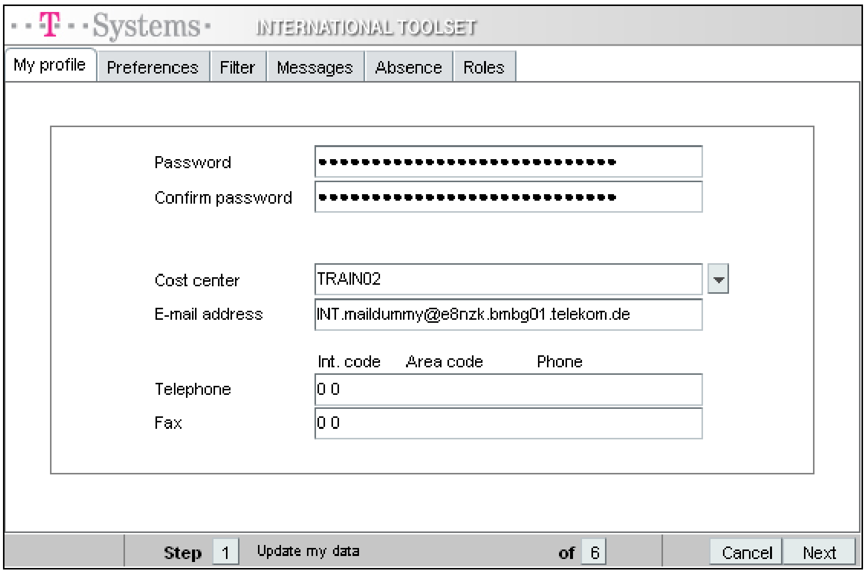


Fig. 155 LBU Administration – Function “Reset password” – modify profile

3.6.6 Action: Manage shipment addresses

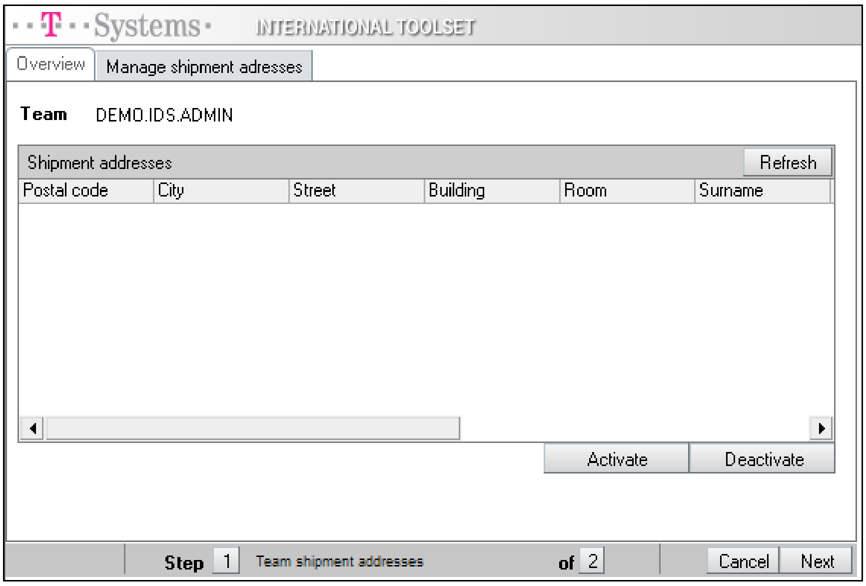


Fig. 156 LBU Administration – Function “Manage shipment addresses”

3.6.7 Action: Change team

The Function “Change team” displays the same window as the Function “New team”, but the user does not create a new team. Instead he changes the Data for the selected team in the team overview. The only Data which can not be changed is the team name. By clicking the button *Transfer employee*, the user gets the dialog for transferring employees between teams which is described in Action: Transfer employee later in this chapter. The changed data is saved by clicking the *Save data* button.

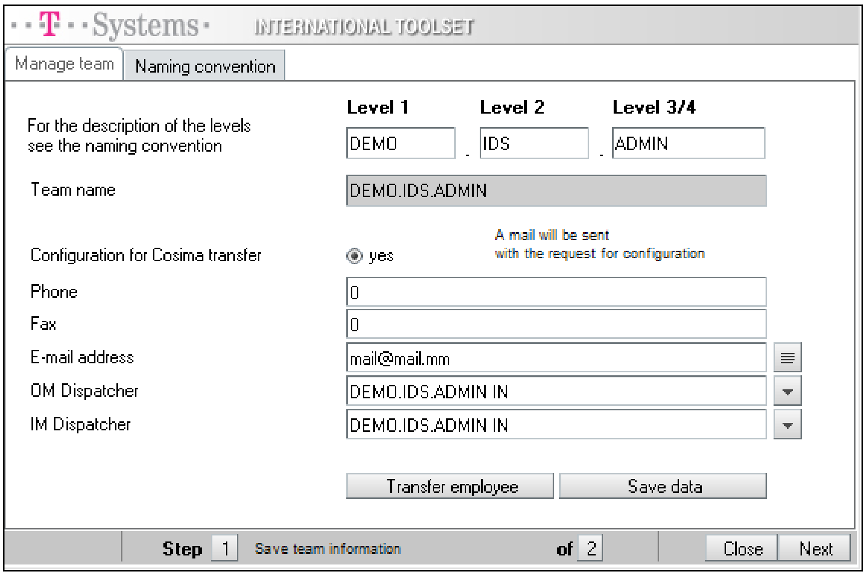


Fig. 157 LBU Administration – Function “Change team”

3.6.8 Action: Manage assignment team lists

Within the function “Manage roles” you can restrict users to an assignment team list. In order to be able to select a list in this function, you first have to create an assignment team list here and add several teams.

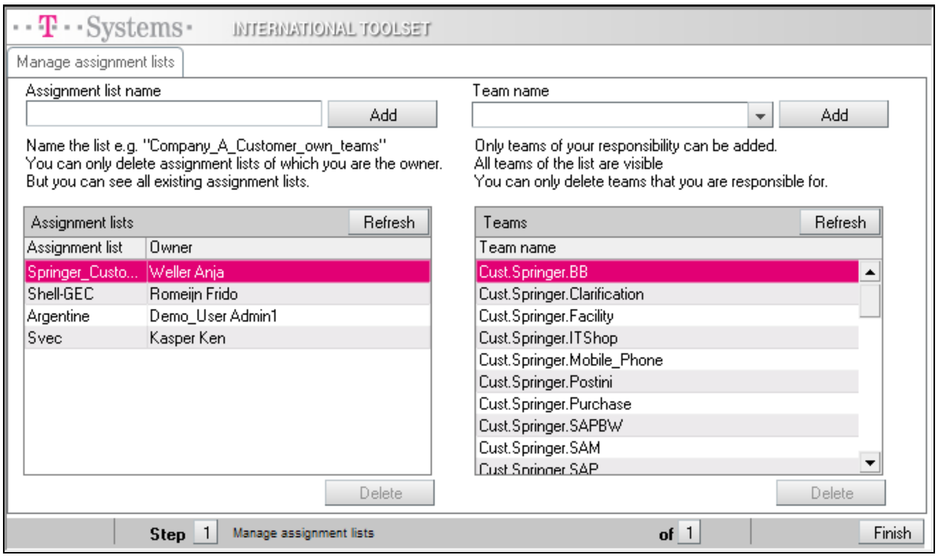


Fig. 158 LBU Administration – Function “Manage assignment team lists”

You can delete an assignment list only if you are the owner if the list. You can add teams to this list from the ones you are responsible for. These are those you can see in the LBU-Administration. You can see all teams in the list, but you can only delete teams that you are responsible for. Be aware that within the function “Manage roles” everybody can use all assignments team lists.
If a user is restricted to an assignment list and the list doesn’t exist or is empty, there will be no teams provided in the menu with the assignment teams in the assignment functions for him.

In addition only teams will be shown in the assignment functions which are configured in the service organisation for the company and at the same time are part of the assignment team list.

3.6.9 Action: Transfer employee

The function “Transfer employee” opens a new Dialog in which the User can transfer an employee from one team to another. To do that, the User has to select the employee from the list and the new team from the combo box. The transfer is completed by clicking the Transfer employee to new team Button. If the User selected the *Delete Roles* Flag, all roles the employee had in the old team, are deleted.

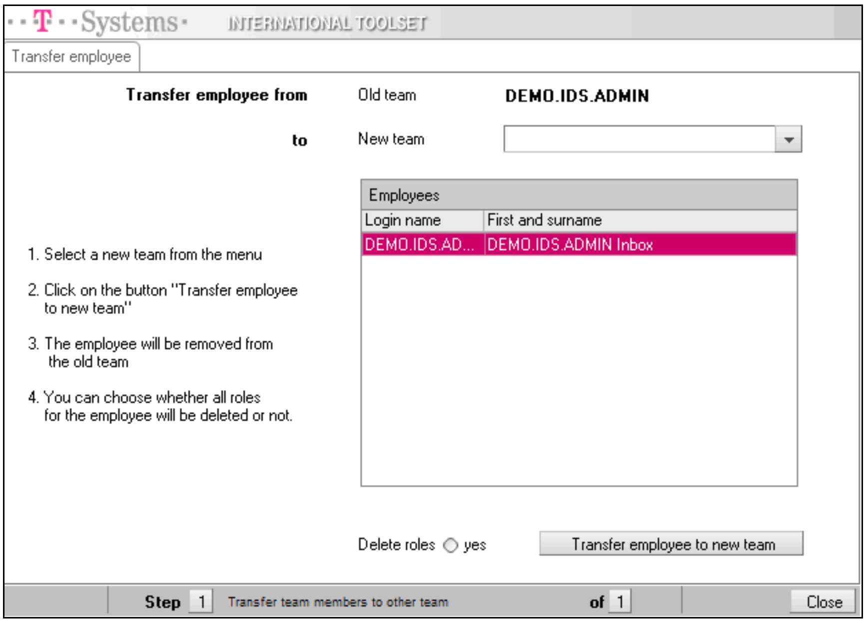


Fig. 159 LBU Administration – Function “Transfer employee”

3.6.10 Action: LBU overview

The function “LBU overview” opens in a new window and gives the user an overview about all mapped Roles, Teams and Countries.
There are two ways to get an overview and therefore two steps in this dialog.
The first one is to download one of the four excel files and open or save it.
Each version is explained and shows the results according to different input data.

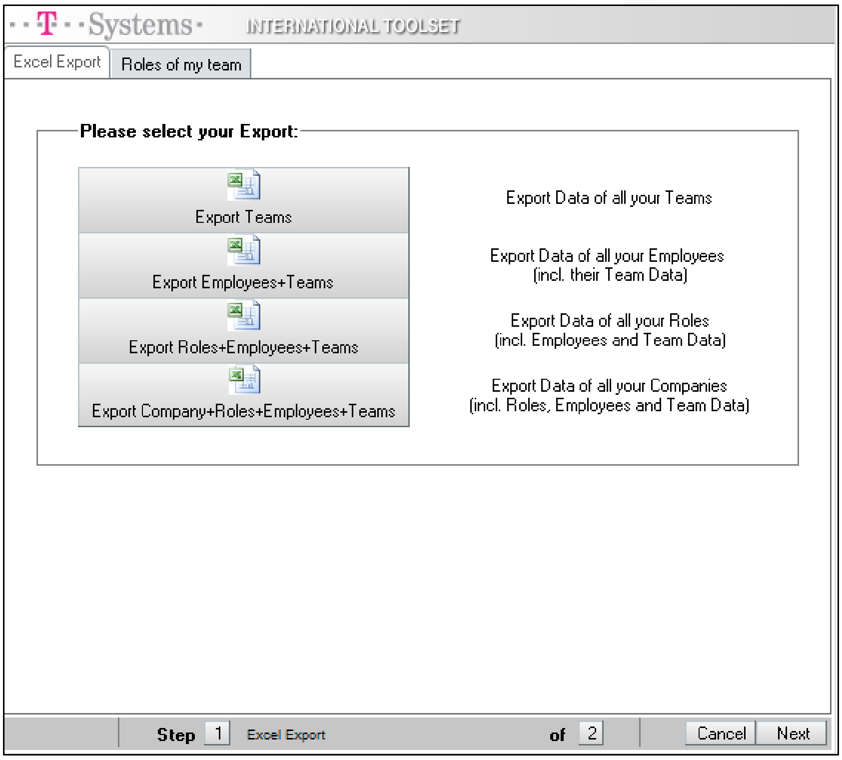


Fig. 160 LBU Administration – Function "LBU overview" – Excel export

The second step gives you the opportunity to get results in a table for three different input values that you can combine as you want.
In the upper part of the window, Filters for team, country and module can be set by the user. Using the Enter Key, a search through all datasets is possible while entering the Filter information. By clicking the *clear fields* button, the Filter is set back to Default.
The result list in the middle part of the window shows all teams which meet the Filter criteria. By clicking a certain column, the list will be sorted by this column. The user count column tells the user how many employees have the corresponding roles for the combination of country and module. A zero in that column means, that no member of the team has the corresponding qualification for the combination of country and module which shouldn't be the case. If the user selects a row, the list in the lower part of the window shows all members of the selected team.

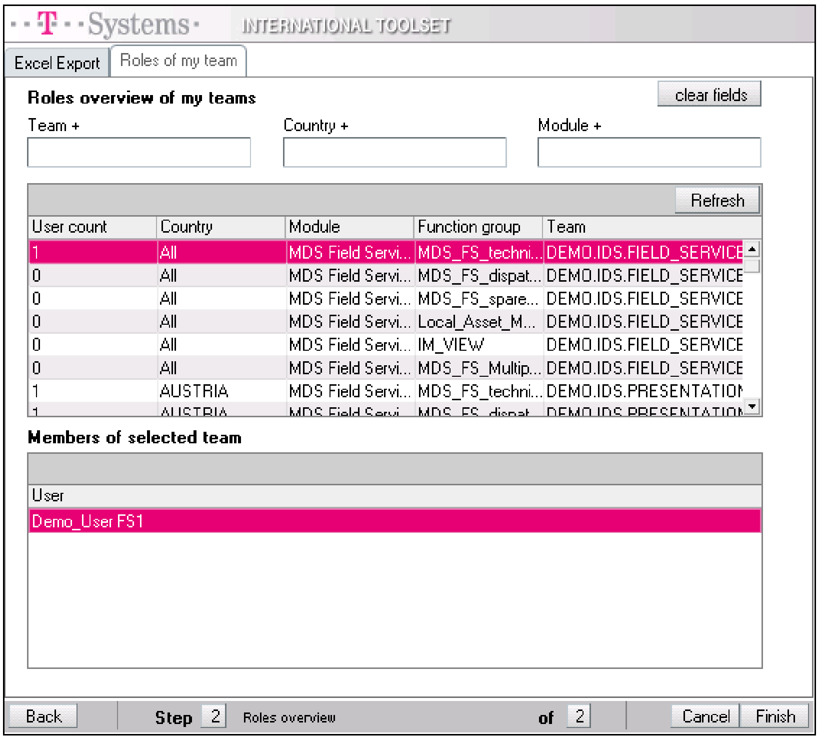


Fig. 161 LBU Administration – Function “LBU overview” – roles of my teams

3.6.11 Action: Request user deactivation

The function “Request user deactivation” opens a new dialog in which you can request a user deactivation by providing the login name, the desired date of the deactivation and the team of the specified user.

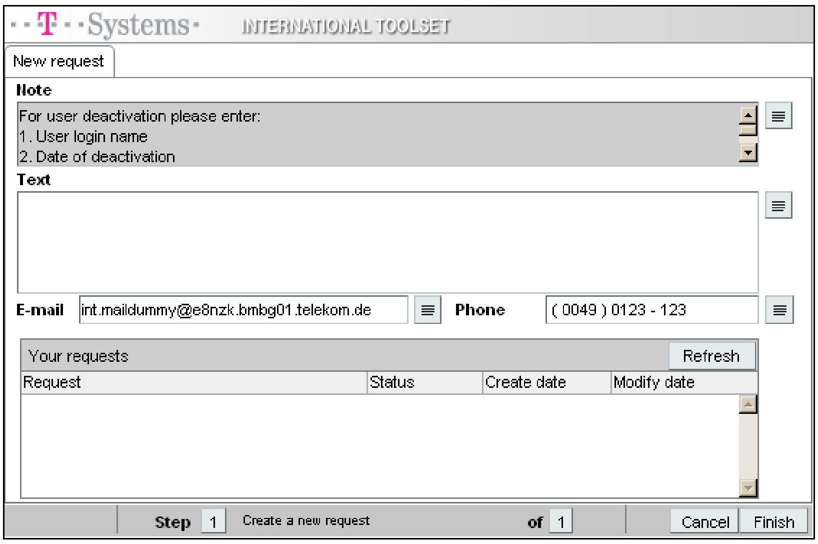
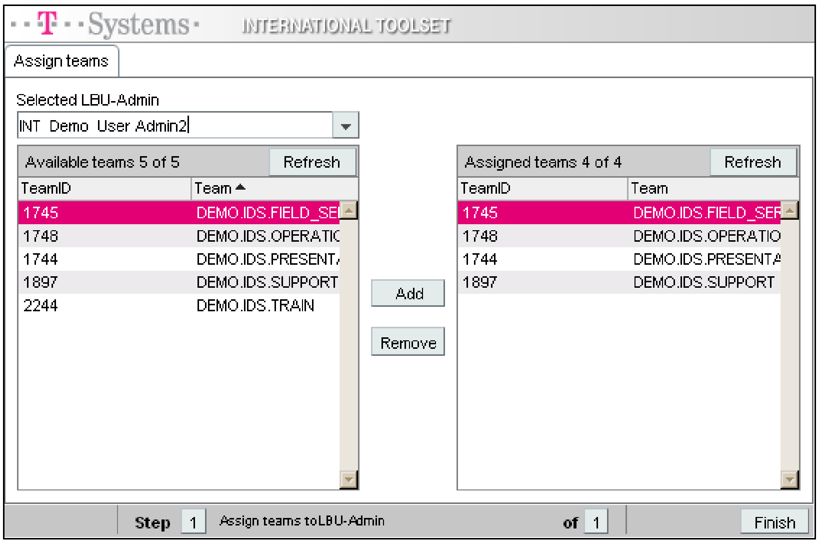


Fig. 162 LBU Administration – Function “Request user deactivation”

3.6.12 Action: Manage LBU teams

This function is designed to enable other LBU administrators to modify your teams. If a team is added to the “Selected LBU-Admin”, it will be visible for this user in the LBU administration.



3.6.13 Action: Manage LBU roles:

The function “Manage LBU roles” opens a new dialog in which a user can configures the roles “LBU Administration” and “LBU Subadministration” for other users und for himself.
And the users can be assigned the responsibility for teams, countries, modules and companies. The team has to be assigned to the user to be able to mange it in the LBU Administration application. The other assignments do not necessarily have to be assigned. If none is assigned, the user has no restriction. So he can manage all countries, all companies und all modules.

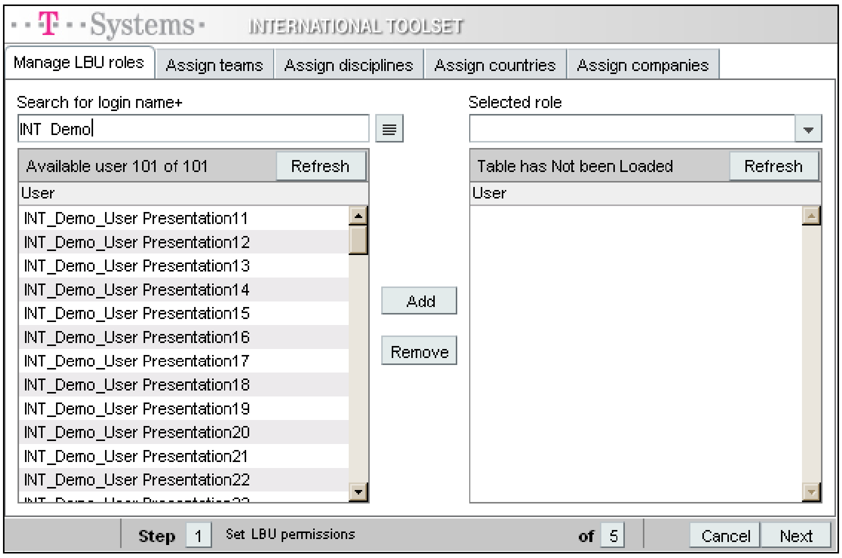


Fig.163 LBU Administration – Function “Request user deactivation”

3.6.14 Team Info Tab Panel

<u>Tab: Team information</u>

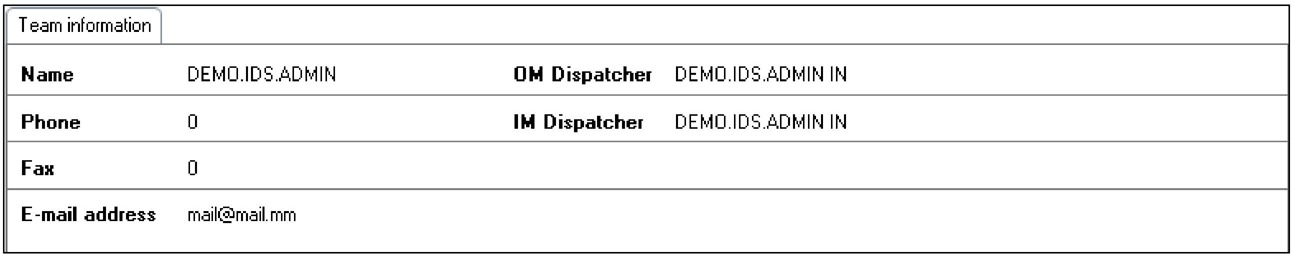


Fig. 164 LBU Administration - Team Info Tab: Team information

The tab “Team information” shows the team name, the dispatcher of the team and the contact information for the selected team.

3.6.15 Team User Area

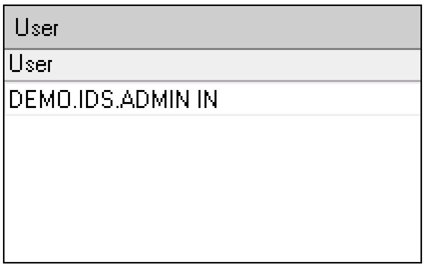


Fig. 165 LBU Administration - Team User Area

In this area the users of the related team are displayed.

3.7 Service Level Management

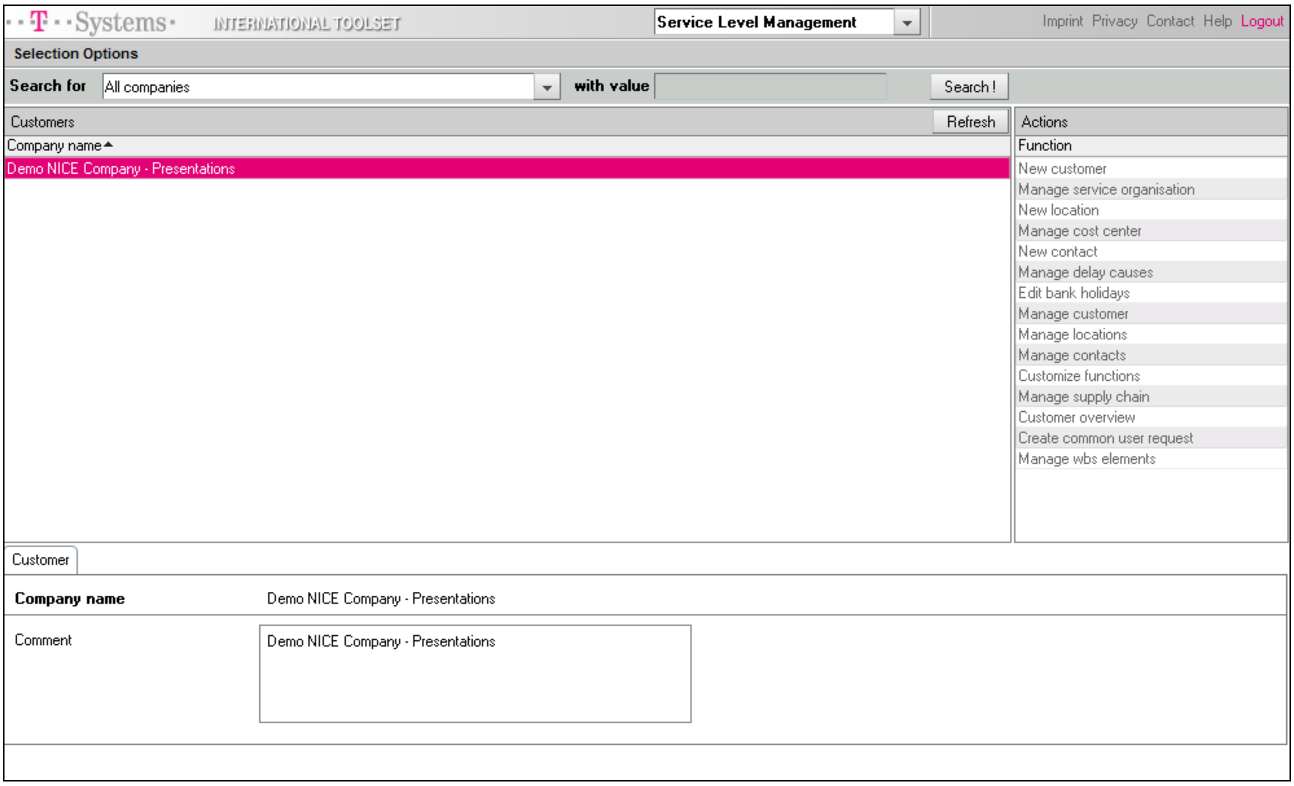


Fig. 166 Service Level Management Frontend

The Service Level Management consists of

- the selection option panel (at the top of the page)
- the customer overview (in the middle of the page)
- the customer action panel (on the right frame of the page)
- the detailed information of the selected customer (on the bottom of the page)

The customer overview shows all companies which can be managed by the user according to his configured permissions. By Default the first company is selected and the detailed information about the company is shown in the service level detail pane. The service level action panel shows all possible actions which can be performed on the selected company.

In the module Service Level Management the user can manage customers and company locations. It is possible to create new customers or manage already configured customers. Each customer company can have different company locations. Furthermore it is possible to configure customer specific settings like the bank holiday calendar.

Selection Options Panel

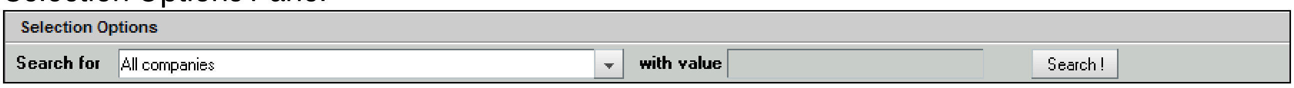


Fig. 167 Service Level Management Frontend - Selection Options Panel

You can reduce the number of customers displayed in the customer overview by using pre-defined filters. A filter consists of the filter name (“search for”) and a value (“with value”) as an additional search criterion, if necessary. If no additional value is required for the filter the field “with value” is write-protected.

<u>Search for</u>

Here you can select a pre-defined filter to reduce the number of customers. Only those customers will be displayed who match the criteria.

<u>With value</u>
In this field additional search criteria must be entered if required by the filter definition.

Filter Examples:

- **All companies:** Shows all customers which can be processed by the user according to the user's rights.
- **Search for company by name in Field "with value":** Shows all customers related to the value. This filter requires a value i.e. in this case the name of a customer.

Customer Overview

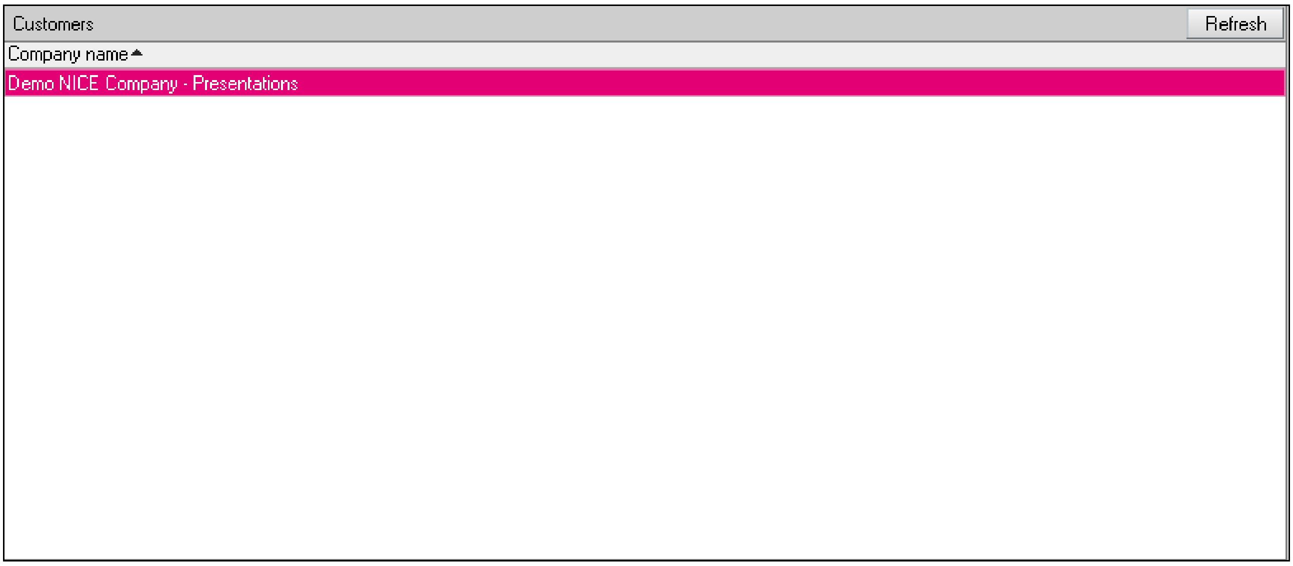


Fig. 168 Service Level Management - Customer Overview

The customer list can be sorted by column. Just click on the company name for example and the list will be sorted after companies.
To refresh the panel click on the button *Refresh*.
With the arrow keys you can skip from one page to another.
Selecting a customer will highlight the related row in magenta.

Customer Actions Panel

Actions
Function
New customer
Manage service organisation
New location
Manage cost center
New contact
Manage delay causes
Edit bank holidays
Manage customer
Manage locations
Manage contacts
Customize functions
Manage supply chain
Configure Workflow
Customer overview
Reports
Create common user request
Manage wbs elements
Manage SLM companies

Fig. 169 Service Level Management - Customer Actions Panel

In the actions panel a list of functions for the processing of the selected customer is displayed. The number of functions shown in the actions panel depends on several criteria like the status of the order, the role concept and the resultant access rights assigned to the user.

3.7.1 Action: New customer

A new customer can be created with this function.
See the following tabs below:

- Company attributes
  Edit the name of the customer and some comment here. Be careful while doing this, because changing it later is very complex.
- Contract information
  Edit the CO order number, the contract number and Debitor number here. Specify if the invoice support module *KBEST* for the commercial inventory of the customer is used, and if a cost center check is required for orders.
- Supply information
  Edit the SAP customer number and the company short form here. The information is required when using SAP@CDS for the procurement.
- Operative information
  Specify the responsible Remote Service (RS) and responsible RS for central measures here. All tasks to the RS will be routed to one of these teams, except you have field service tasks generated at the same time for the same service request. In this case all tasks will be routed to the field service.
  The Responsible OP indicates an operational team responsible for the service request of the new customer. The value in this field hasn't any impact to webSRM currently.

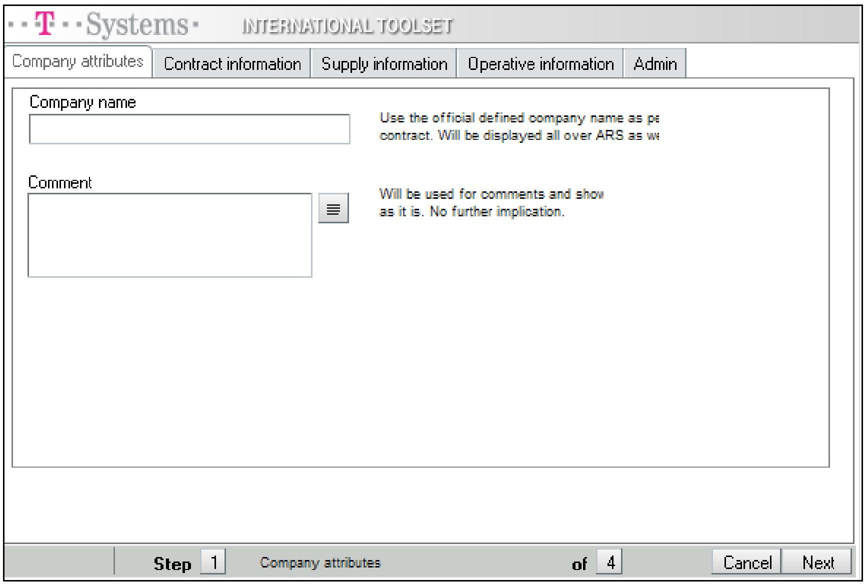


Fig. 170 Service Level Management – Function "New customer"

3.7.2 Action: Manage service organization

Define the customer's service organization with this function.
See the following tabs below:

- Company
  Get an overview about the customer's attributes here.
- Select countries
  Select the countries where the customer is represented.
- Select service modules
  Select the service modules e.g. MDS Field Service and MDS Remote Service that should be supplied for the customer.
- Select teams
  Create the service organization for the customer by selecting teams for the selected combination of country and service module. All teams shown in the list support the selected combination of country and service module. The team members can see the tickets for the customer in the selected country at the next day (because of technical reasons), if they have the appropriate roles.
- Select remote teams
  All teams shown in the list are remote teams. The mapped teams are available in function "Assign task to remote" to transfer incidents from webSRM to ARSIM or Cosima.

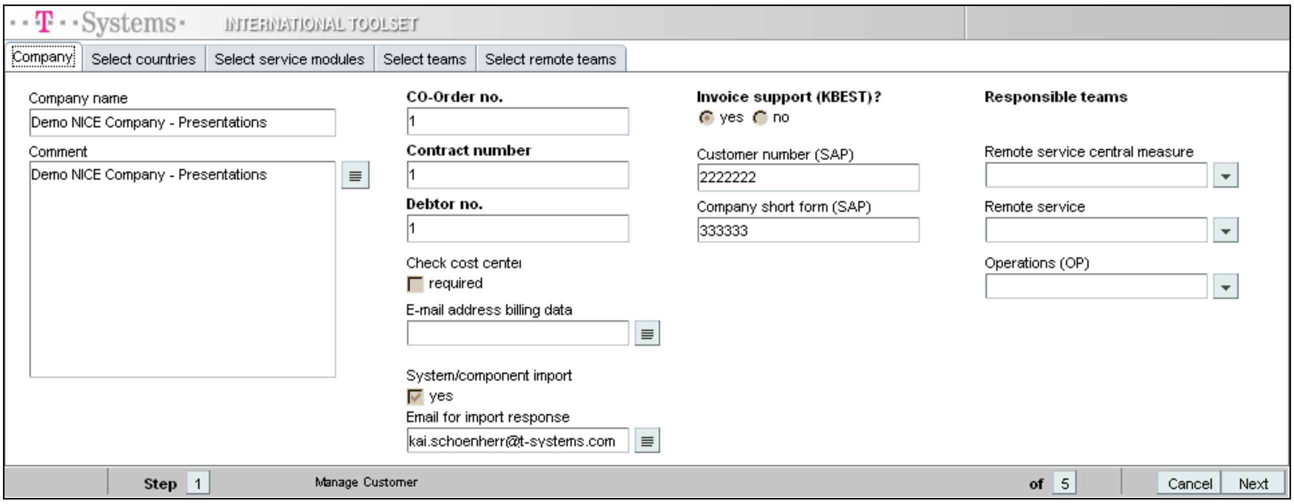


Fig. 171 Service Level Management – Function “Manage service organisation”

3.7.3 Action: New location

Add a customer’s location here.
See the following tabs below:

- Country, Company, Comment
  Edit the country where the new location is situated and its time difference to UTC.
- Address data and status
  Edit postal code, city, street and status of the location.
- Groups and responsibilities
  Set up the responsible field service for the location and the Order Management (OM) dispatcher here. All field service tasks for a system at this location will be routed to the OM dispatcher.
- Location overview
  Find a list about the existing locations of the customer here.
- Save data
  Save the new location.

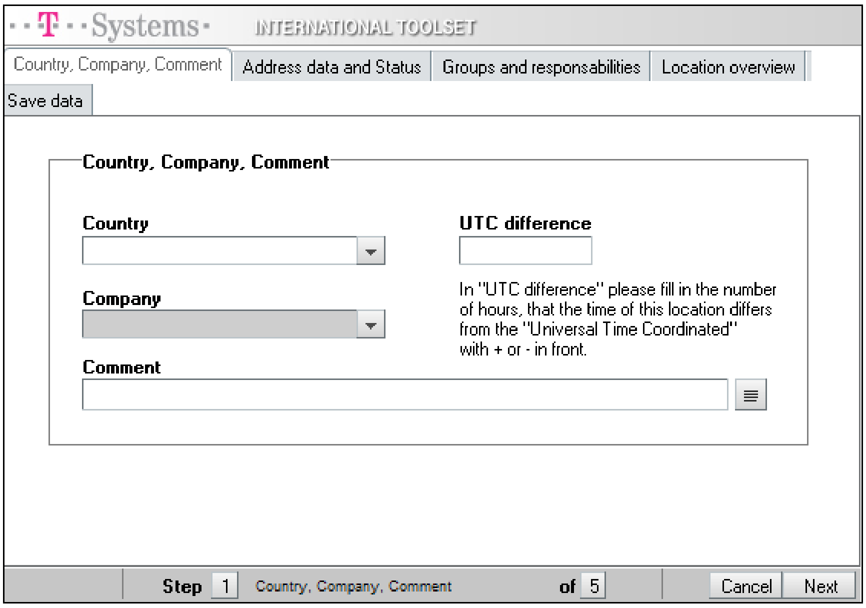


Fig. 172 Service Level Management – Function “New location”

3.7.4 Action: Manage cost center

Add or edit a cost center of the customer.
Select a cost center from the list, edit the data and press *Save* to change the selected cost center.
Use the button *Add* to add a new cost center.
Select surname or last name of the cost center owner and save, or press *Delete* to erase the cost center owner.

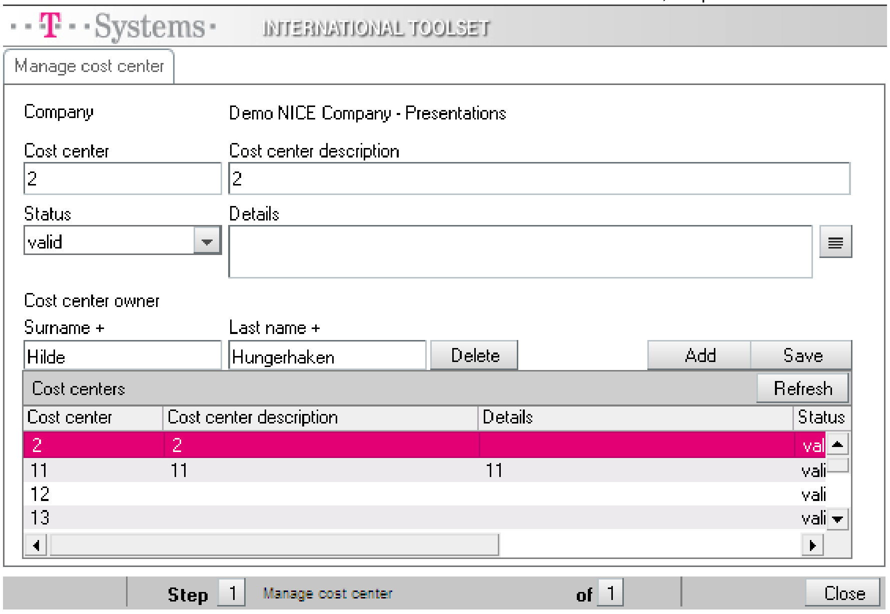


Fig. 173 Service Level Management – Function “Manage cost center”

3.7.5 Action: Manage delay causes

Customize the delay causes for tasks of the customer here.

The Function “Manage delay causes” opens in a new window and shows the existing delay causes for the selected company. To use special delay causes for a company press *Customize*. Then it is possible to add, delete or modify delay causes for the company.
You can add new delay causes by filling the fields, while the layer 1, the language and the name of the delay cause are required. The other values are optional. After you pressed the *Add* button, the new delay cause is shown in the table below.
You can also delete delay causes you do not need any more, by selecting the row in the table and pressing the *Delete* button.

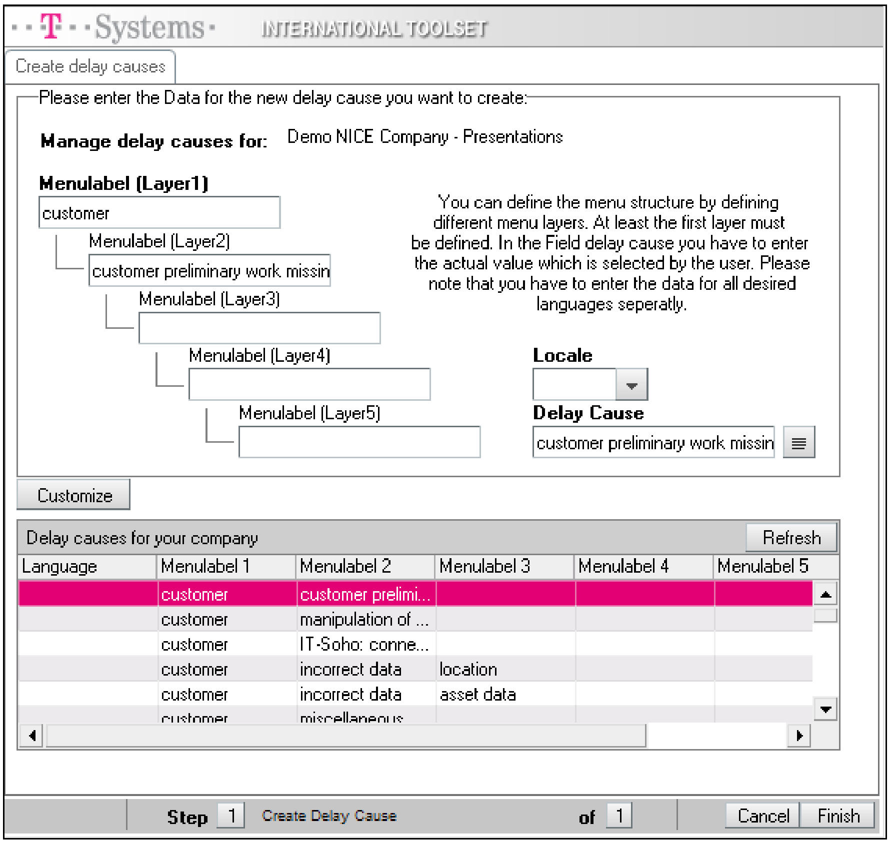


Fig. 174 Service Level Management – Function “Manage delay causes”

3.7.6 Action: Edit bank holidays

The Function “Edit holiday” opens in a new window in which the bank holidays for the selected company can be configured and consists of the following steps:

- Edit Holiday information

The configured holiday calendar for a company affects the SLA calculation for a request. Please note that the SLA calculation for requests in Germany is NOT affected by the configured calendar in webSRM.

Edit Holiday information: The Page is divided into two parts. On the left side of the window the user gets a list of all configured bank holiday groups which are identified by their Tag. The right side of the window shows the Holidays for the selected holiday information from the left list. To modify the list the user has to push the *Change holiday information* button.

By doing that, the system copies the selected Tag and Data to a new Tag, in which the Holidays can be edited. After modifying the List, the user has to save his changes by pushing the *Change holiday information* button again.

To use the standard holiday information again, press the *Change back to standard* button. You cannot affect the name of the holiday information. The system changes it on its own to show if it is the standard or the customized holiday information.

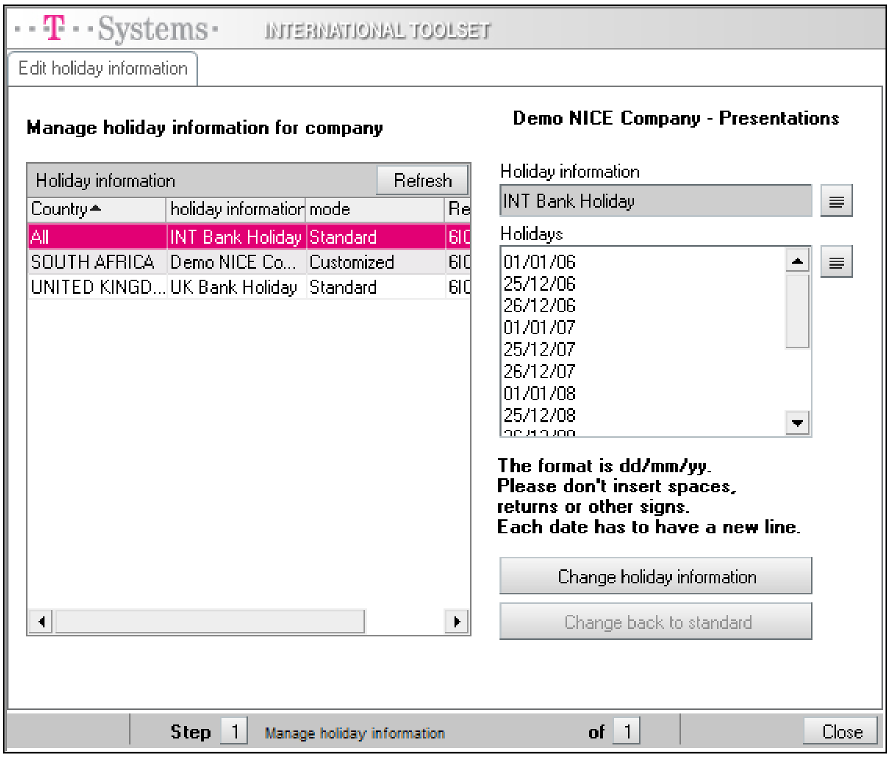


Fig. 175 Service Level Management – Function “Edit bank holidays”

3.7.7 Action: Manage customer

The company name in official notation from the contract and a field for comments is shown in the tab “company attributes”.

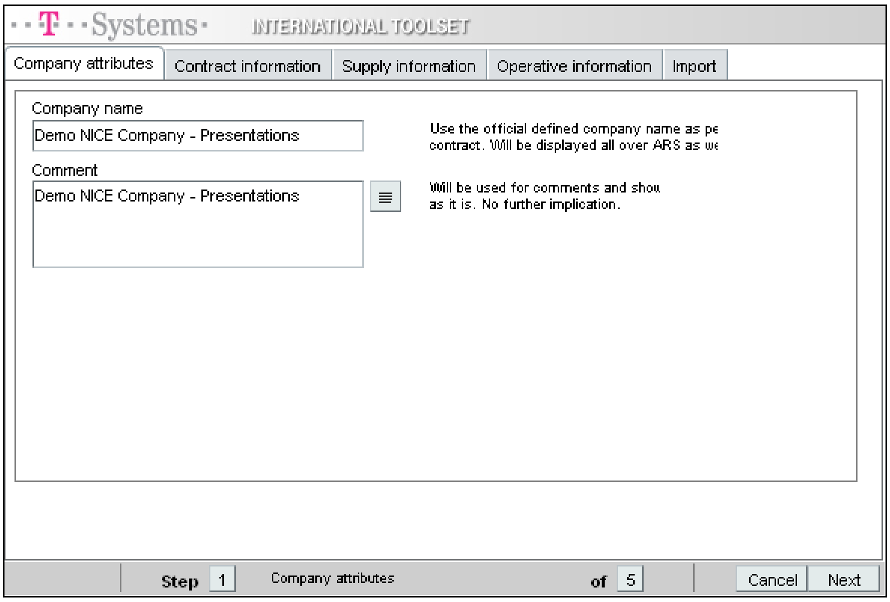


Fig. 176 Service Level Management – Function “Manage customer”

In the tab “contract information” you will find the CO-Order number (from SAP), die contract number and the debtor number (from SAP). Furthermore you can select if a cost center check is required, which provokes that only orders with a valid cost center can be created. In the next field you can fill in an email address of the delivery or service manager, who will get a monthly overview of billing data. You can also define whether this company is a KBEST-company.

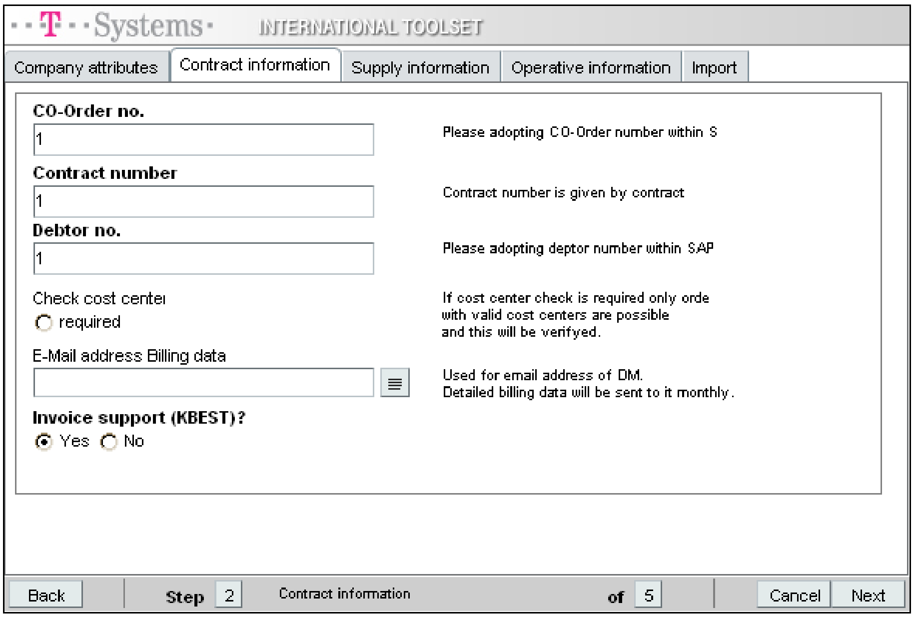


Fig. 177 Service Level Management – Manage customer, contract information

For customers that obtain IT (hardware and software) the SAP customer number and the company short form from SAP@CDS is shown in the tab “supply information”.

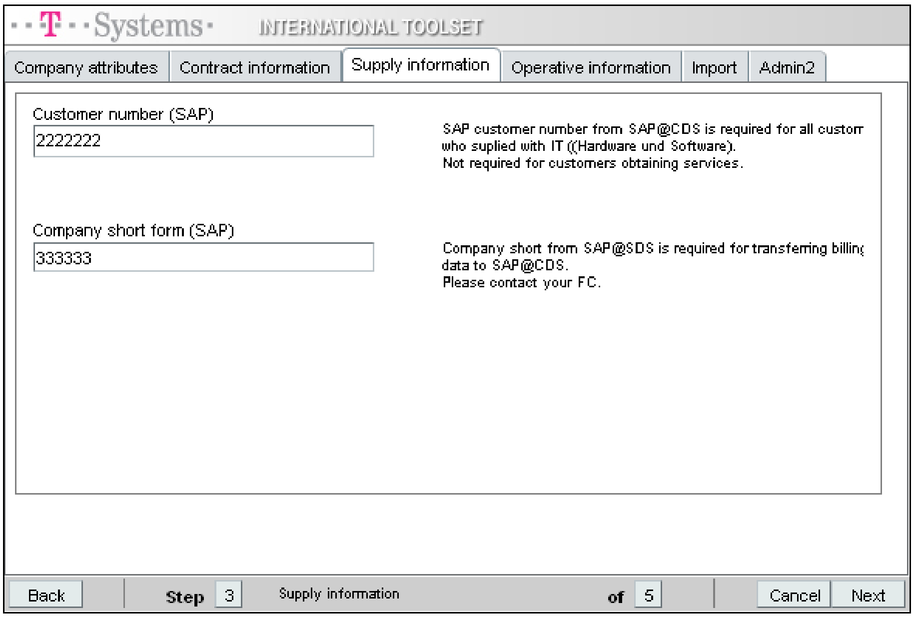


Fig. 178 Service Level Management – Manage customer, supply information

In the last tab contact persons from remote trouble shooting (RTS) and operations (OP) are mentioned.

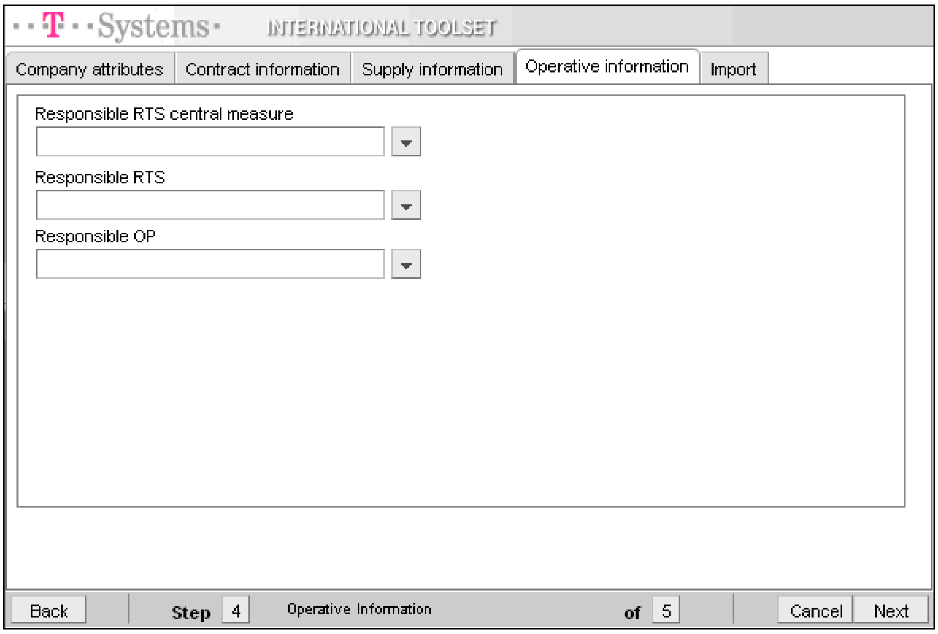


Fig. 179 Service Level Management – Manage customer, operative information

To allow system data imports the response mail address and the flag on the page "Import" has to be set.

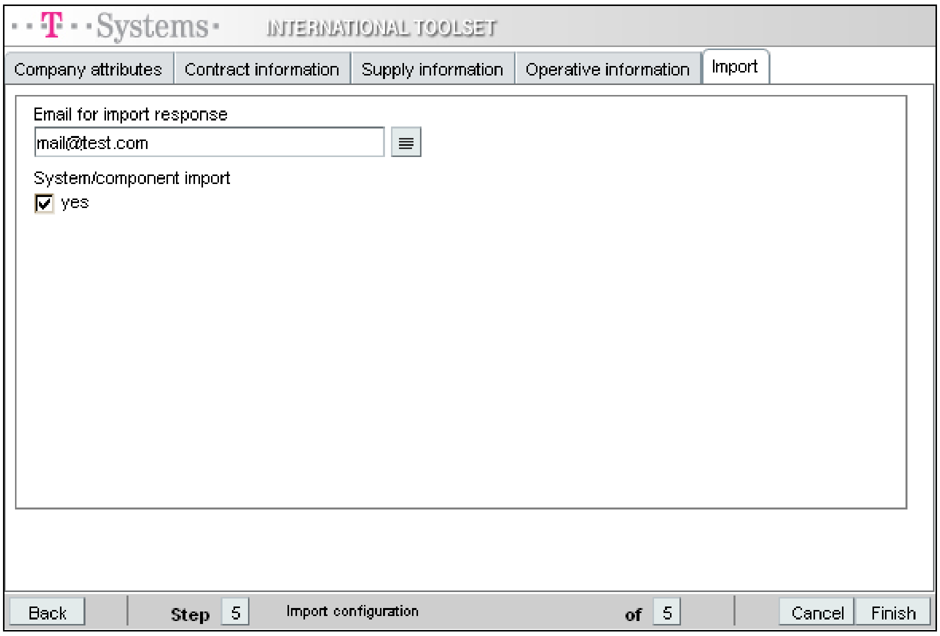


Fig. 180 Service Level Management – Manage customer, import

3.7.8 Action: Manage locations

The Function "Manage Locations" opens in a new window and shows all entered locations for the selected company. After marking a location in the list, the user can change the responsible field service by selecting a Team from the Combo Box and saving it using the *Save field service to marked locations* Button.

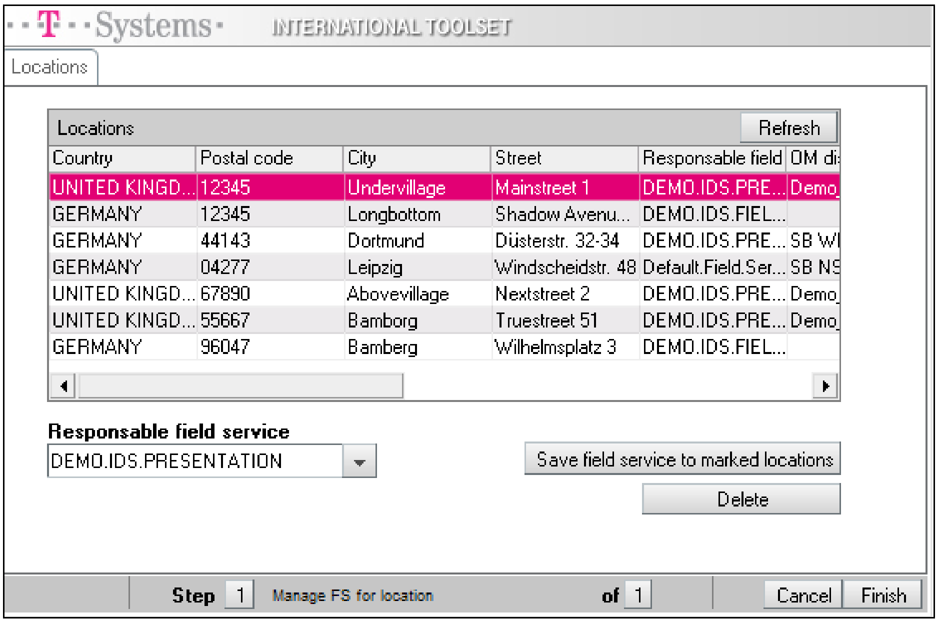


Fig. 181 Service Level Management – Function "Manage locations"

3.7.9 Action: New contact

In this dialog you can create a new contact person for a specific company. On the first page you fill in name, email-address, telephone and fax and select a language.
***Note:** Only digits are allowed for the International codes.*
The loginname will be used for the shop and cannot be changed.

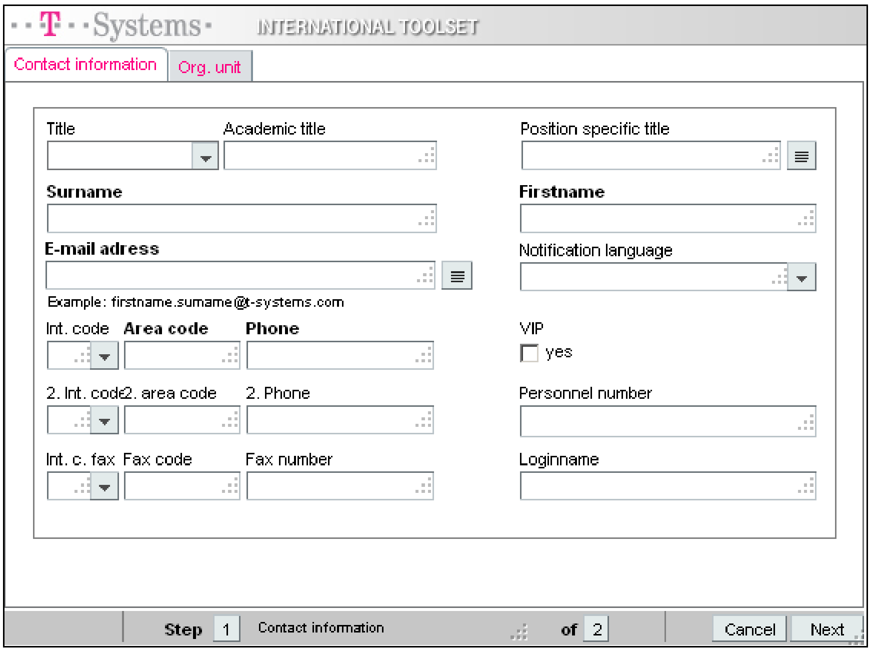


Fig. 182 Service Level Management – New contact, contact information

One the second page of the dialog you select a city of the previously administered locations for this company. In a pop-up window you can chose of one probably more addresses in this city. By doing this the team field will automatically be filled. Additionally you can add information about building and room as well as the cost center.

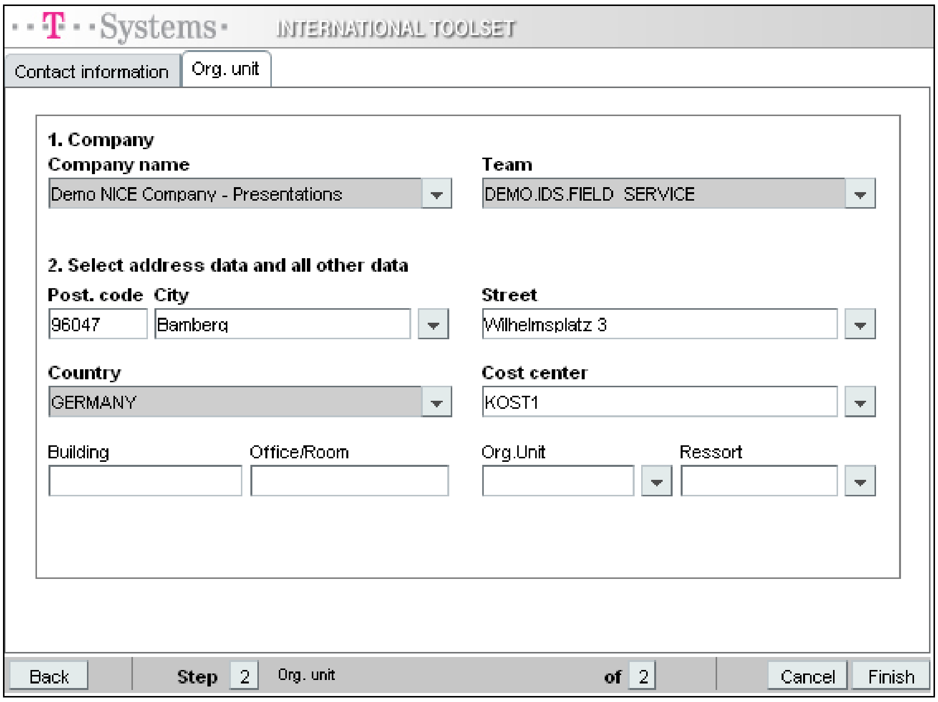


Fig. 183 Service Level Management – New contact, Org. unit

3.7.10 Action: Manage contacts

You search the contact person that you want to edit by typing the name in the search field. After selecting the contact you can change the contact information (see Action: **New contact**) and save all changes by pressing the *Finish* button.

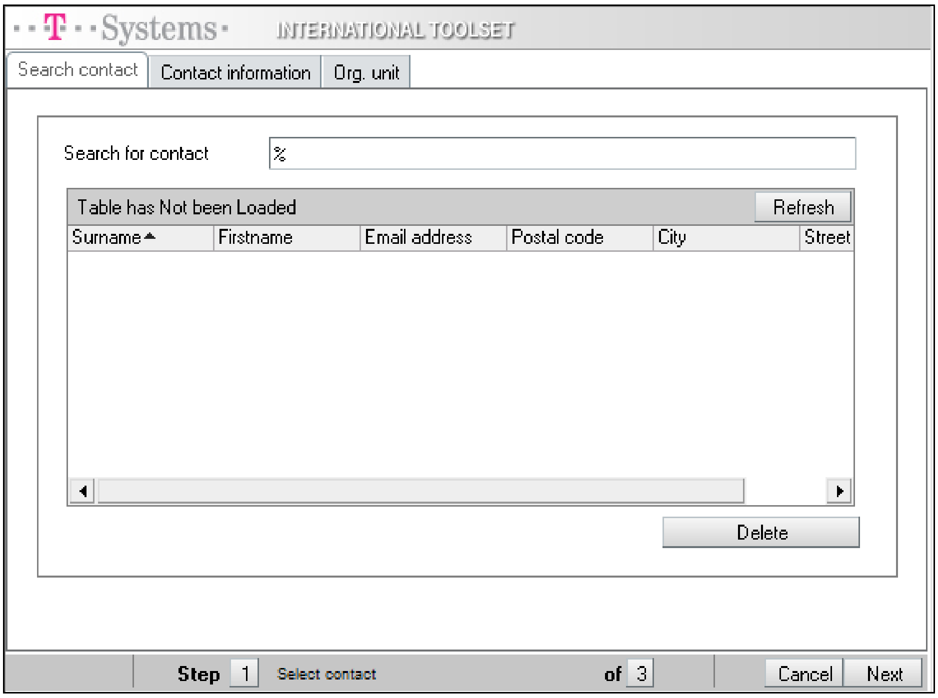


Fig. 184 Service Level Management – Function “Manage contacts”

3.7.11 Action: Customize functions

In this dialog you can set functions visible or hidden according to the selected company. Most functions are by default visible. Some are by default hidden. You can set them visible or hidden as you like depending on the company. This action will need up to half an hour to effect the application.

You cannot change functions of the applications Service Level Management and LBU administration.

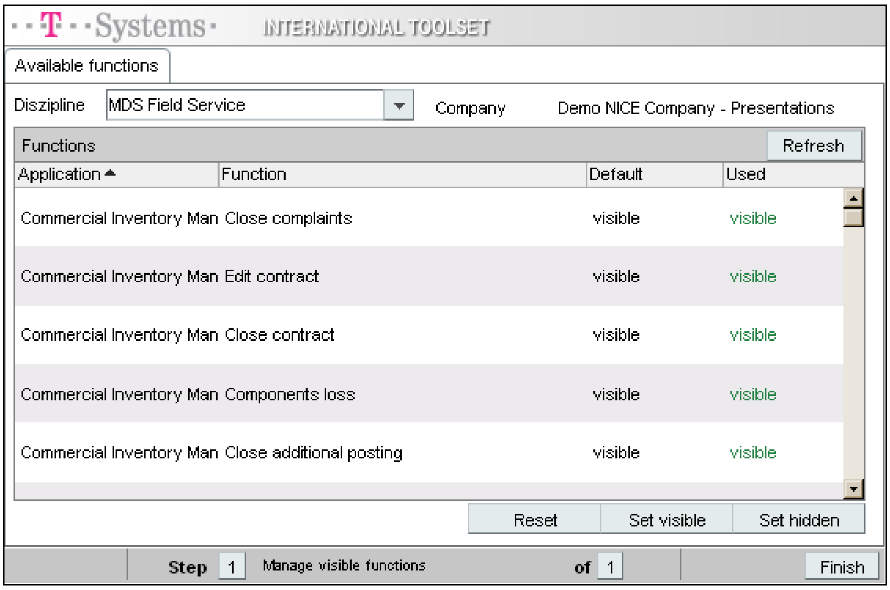


Fig. 185 Service Level Management – Function “Customize functions”

3.7.12 Action: Manage supply chain

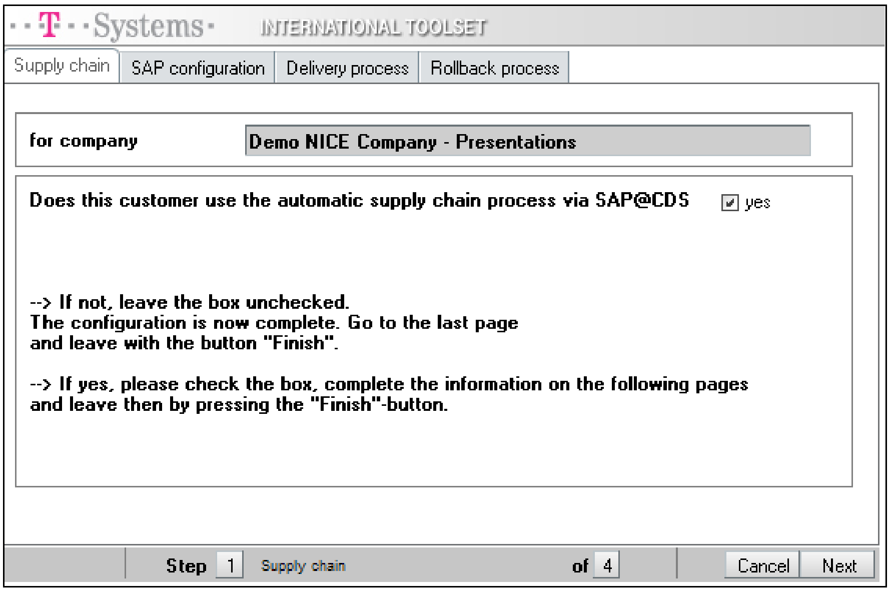


Fig. 186 Service Level Management – Function “Manage supply chain”

3.7.13 Action: Customer overview

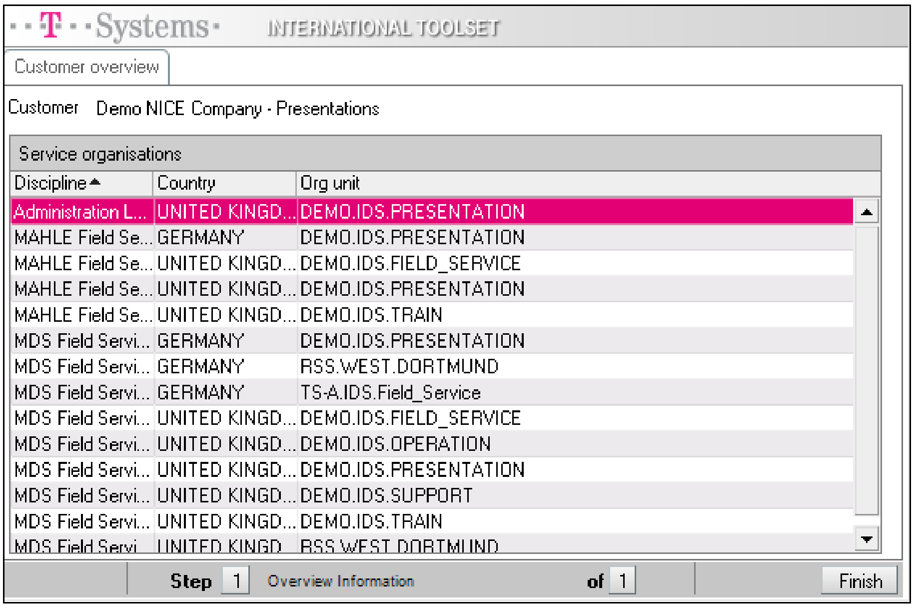


Fig. 187 Service Level Management – Function “Customer overview”

3.7.14 Action: Create common user request

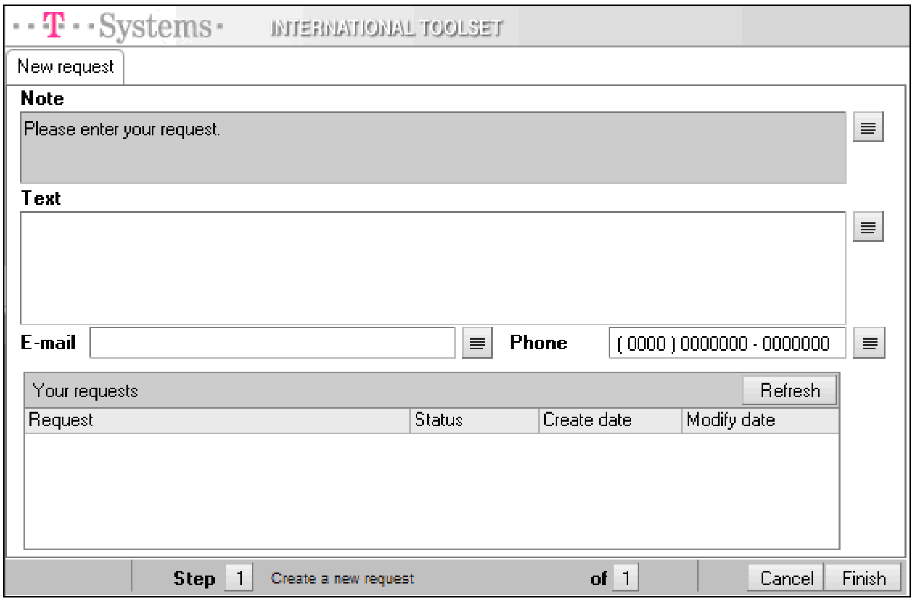


Fig. 188 Service Level Management – Function “Create common user request”

3.7.15 Action: Manage wbs elements

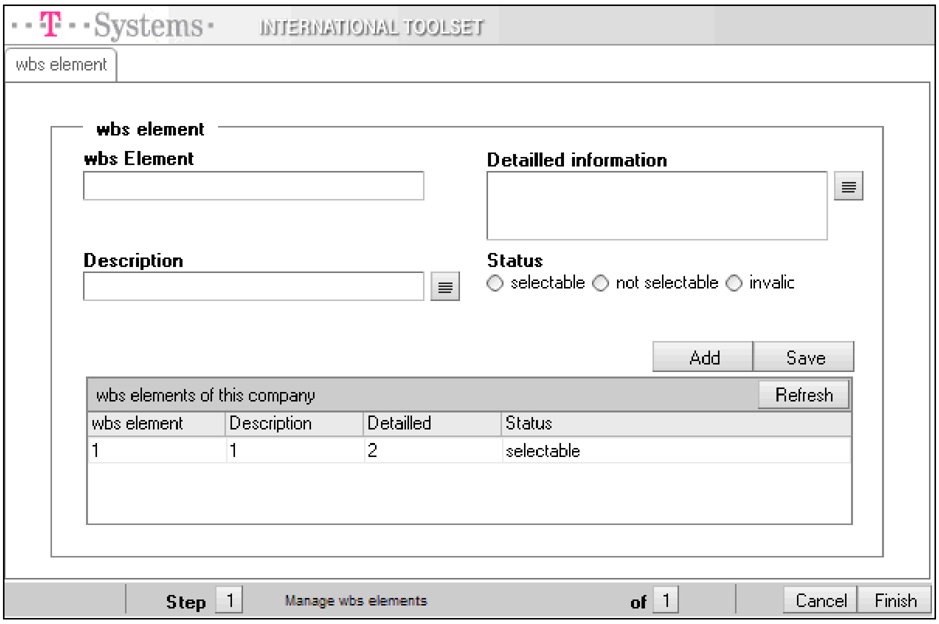


Fig. 189 Service Level Management – Function "Manage wbs elements"

3.7.16 Customer Info Tab Panel

<u>Tab: Customer</u>

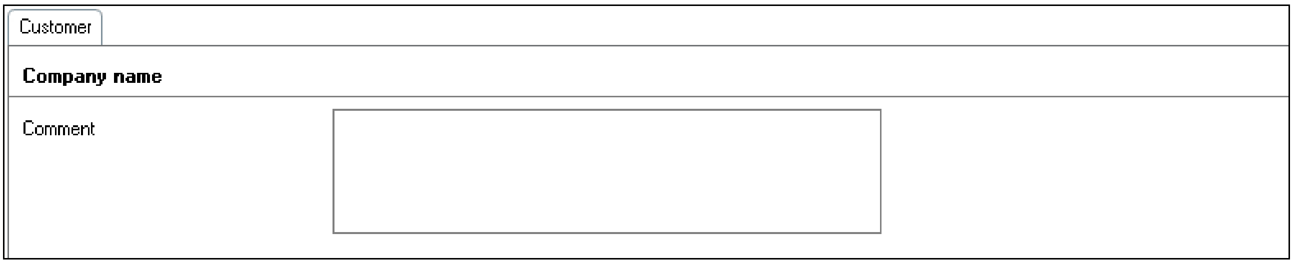


Fig. 190 Service Level Management - Customer Info Tab: Customer

The tab "Customer" shows the company name and a text field to write a comment.

3.8 Commercial Inventory Management

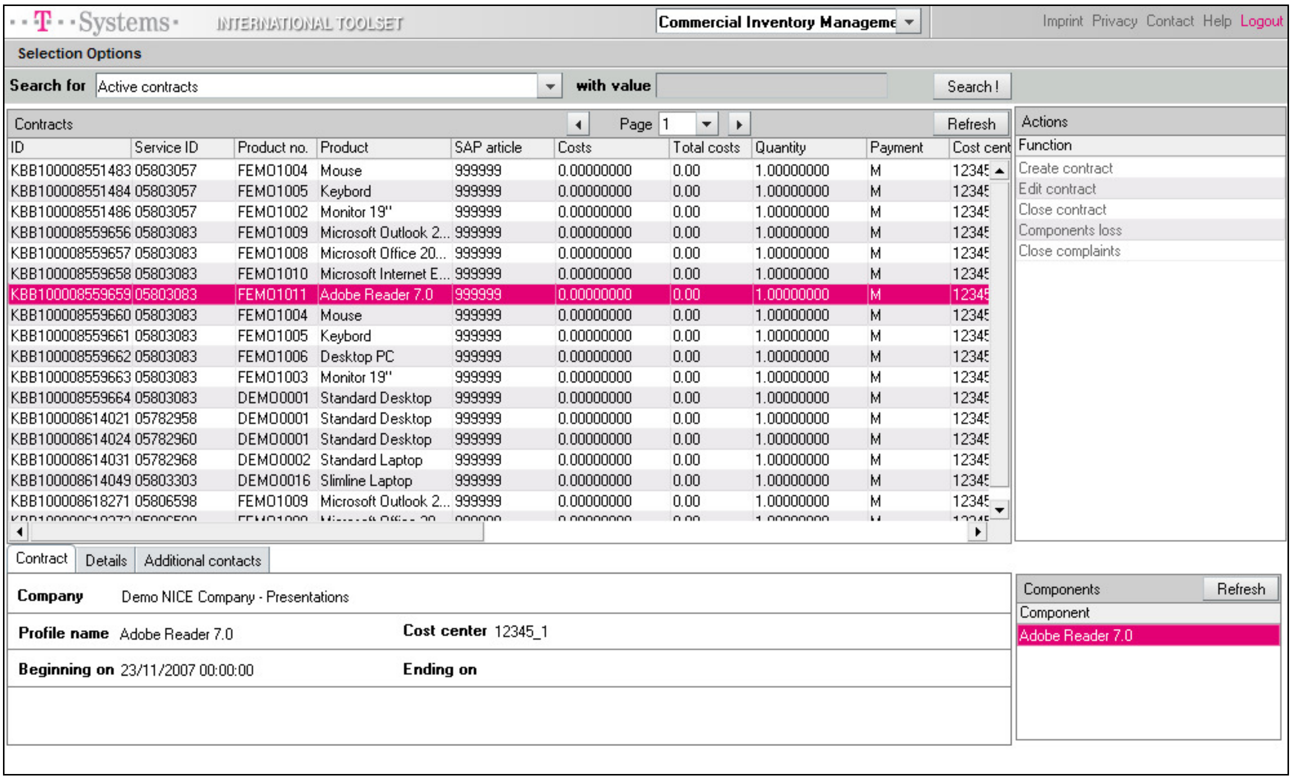


Fig. 191 Commercial Inventory Management Frontend

The Commercial Inventory Management consists of

- the selection option panel (at the top of the page)
- the contract overview (in the middle of the page)
- the contract action panel (on the right frame of the page)
- the detailed information of the selected contract or additional posting (on the bottom of the page)

Selection Options Panel

Fig. 192 Commercial Inventory Management Frontend - Selection Options Panel

You can reduce the number of contacts and/or additional postings displayed in the contract overview by using pre-defined filters. A filter consists of the filter name ("search for") and a value ("with value") as an additional search criterion, if necessary. If no additional value is required for the filter the field "with value" is write-protected.

<u>Search for</u>
Here you can select a pre-defined filter to reduce the number of contracts and/or additional postings. Only those contracts or additional postings will be displayed which match the criteria.

<u>With value</u>
In this field additional search criteria must be entered if required by the filter definition.

Filter Examples:

- **All contracts:** Shows all contracts which can be processed by the user according to the user's rights.

- **Search for Contract by company in Field "with value":** Shows all contracts related to a special company. This filter requires a value i.e. in this case the name of a company.

Contract Overview

Contracts ◄ Page 1 ► Refresh

ID	Service ID	Product no.	Product	SAP article	Costs	Total costs	Quantity	Payment	Cost cent
KBB100008551483	05803057	FEM01004	Mouse	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008551484	05803057	FEM01005	Keybord	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008551486	05803057	FEM01002	Monitor 19''	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008559656	05803083	FEM01009	Microsoft Outlook 2...	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008559657	05803083	FEM01008	Microsoft Office 20...	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008559658	05803083	FEM01010	Microsoft Internet E...	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008559659	05803083	FEM01011	Adobe Reader 7.0	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008559660	05803083	FEM01004	Mouse	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008559661	05803083	FEM01005	Keybord	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008559662	05803083	FEM01006	Desktop PC	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008559663	05803083	FEM01003	Monitor 19''	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008559664	05803083	DEM00001	Standard Desktop	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008614021	05782958	DEM00001	Standard Desktop	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008614024	05782960	DEM00001	Standard Desktop	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008614031	05782968	DEM00002	Standard Laptop	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008614049	05803303	DEM00016	Slimline Laptop	999999	0.00000000	0.00	1.00000000	M	12345
KBB100008618271	05806598	FEM01009	Microsoft Outlook 2...	999999	0.00000000	0.00	1.00000000	M	12345

Fig. 193 Commercial Inventory Management - Contract Overview

The contract list can be sorted by column. Just click on the costs for example and the list will be sorted after costs.
To refresh the panel click on the button *Refresh*.
With the arrow keys you can skip from one page to another.
Selecting a contract will highlight the related row in magenta.

Contract Actions Panel

Actions

Function
Create contract
Edit contract
Close contract
Components loss
Close complaints

Fig. 194 Commercial Inventory Management - Contract Actions Panel

In the actions panel a list of functions for the processing of the selected contract is displayed. The number of functions shown in the actions panel depends on several criteria like the type of the selected item (contract or additional posting) the status of the contract, the role concept and the resultant access rights assigned to the user.

3.8.1 Action: Create contract

This action creates a new contract. The initial values will be assumed from the selected contract in the contract overview.

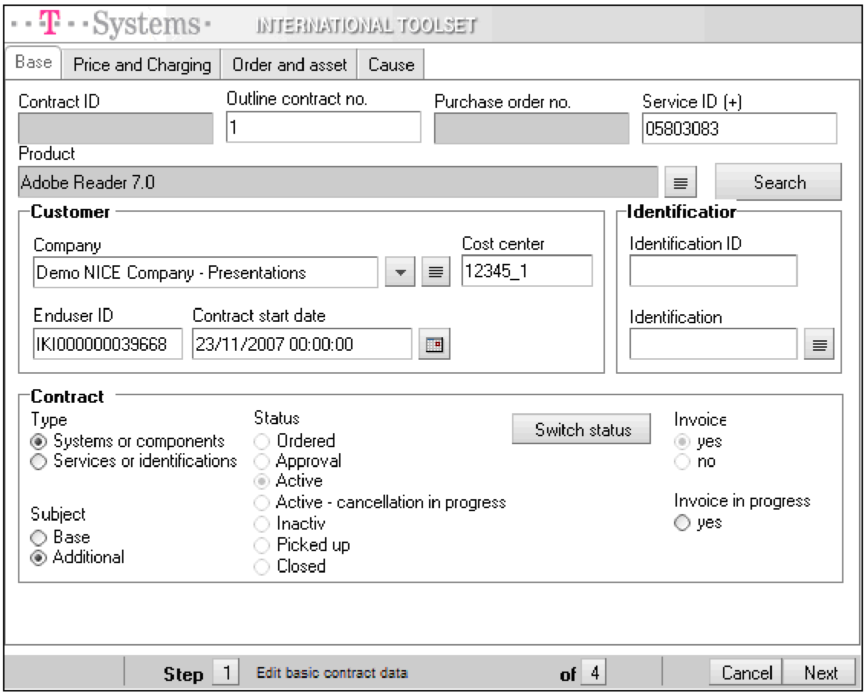


Fig. 195 Commercial Inventory Management – Function “Create contract”

On page “Base” the basic data of the new contract like Service ID, status, type and subject can be edited. The product can’t be edited. The product *Search* functionality is not yet implemented.

3.8.2 Action: Edit contract

This action edits the contract information.

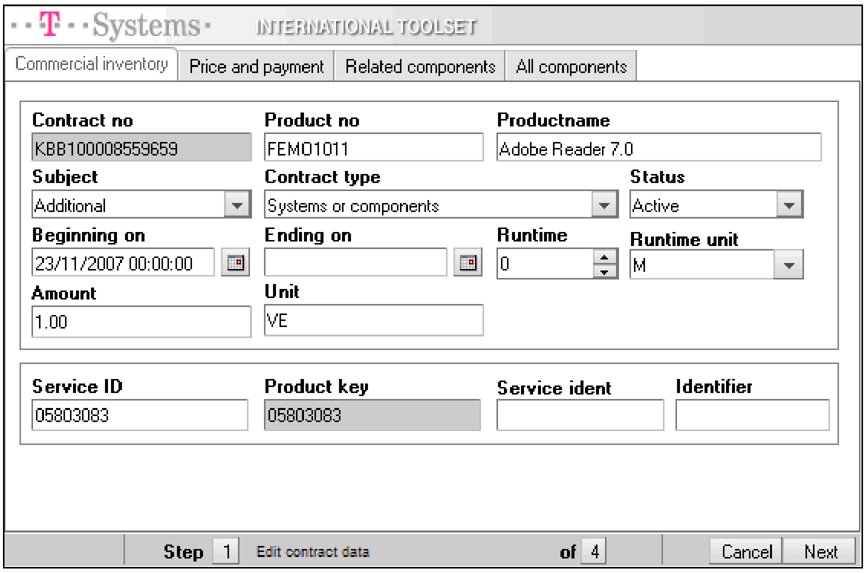


Fig. 196 Commercial Inventory Management – Function “Edit contract”

The basic contract items like subject, contract period are shown on page “Commercial inventory”. Price and payment information are shown on the corresponding page. The information will be stored if you press *Finish* on the last page.

3.8.3 Action: Close contract

The action closes the contract immediately or at the end of the contract period. Closing the contract will have no impact on the technical assets. Closing the contract with maturity costs isn't implemented yet.

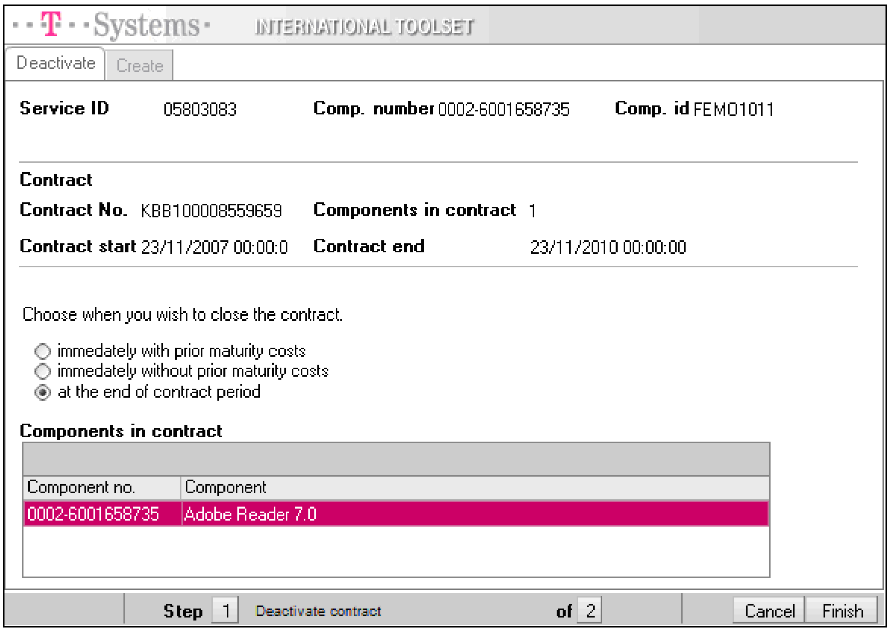


Fig. 197 Commercial Inventory Management – Function “Close contract”

3.8.4 Action: Close complaints

Invoices and complaints of the selected contract can be handled with this action.

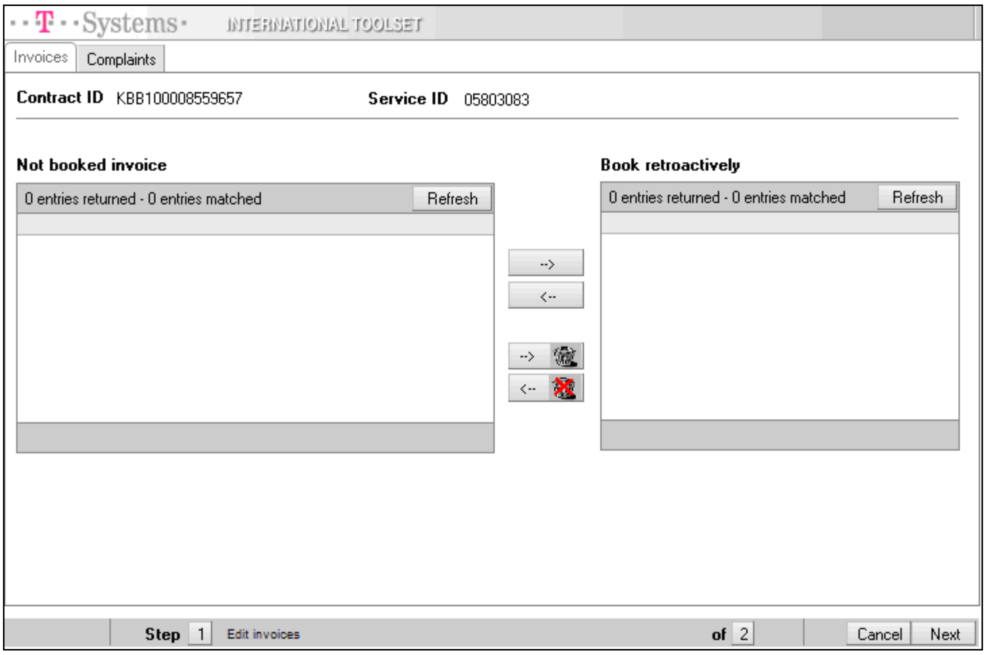


Fig. 198 Commercial Inventory Management – Function “Close complaints”

On page “Invoices” the following actions can be executed:

- book an invoice retroactively (with right arrow button)
- undo the booking of an invoice (with left arrow button)
- delete a not booked invoice
- undo the deletion

3.8.5 Contract Info Tab Panel

<u>Tab: Contract</u>

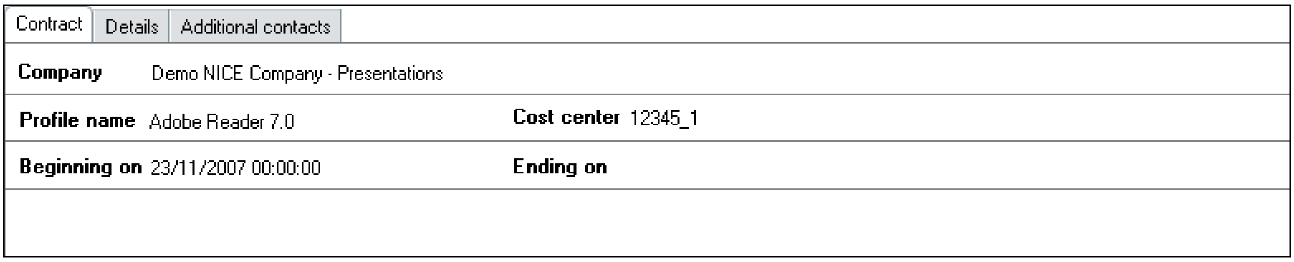


Fig. 199 Commercial Inventory Management - Contract Info Tab: Contract

The tab “Contract” shows the profile name, the cost center of the contract and the beginning and end date for the selected contract.

<u>Tab: Details</u>

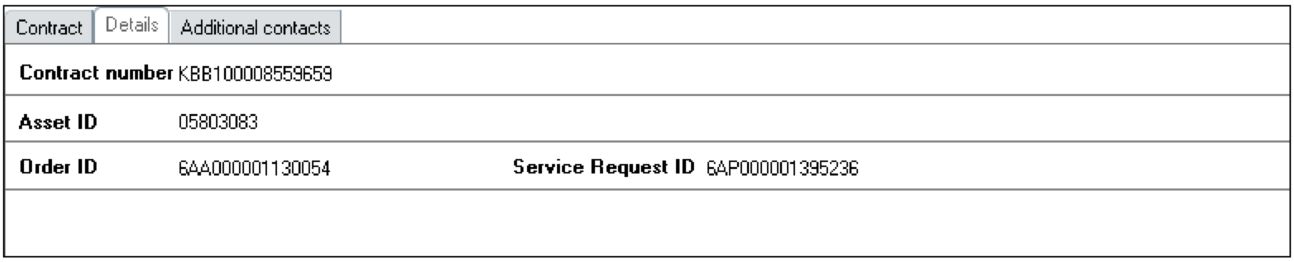


Fig. 200 Commercial Inventory Management - Contract Info Tab: Details

The tab “Details” shows the contract number, the asset ID, the order ID and the service request ID.

Tab: Additional contacts

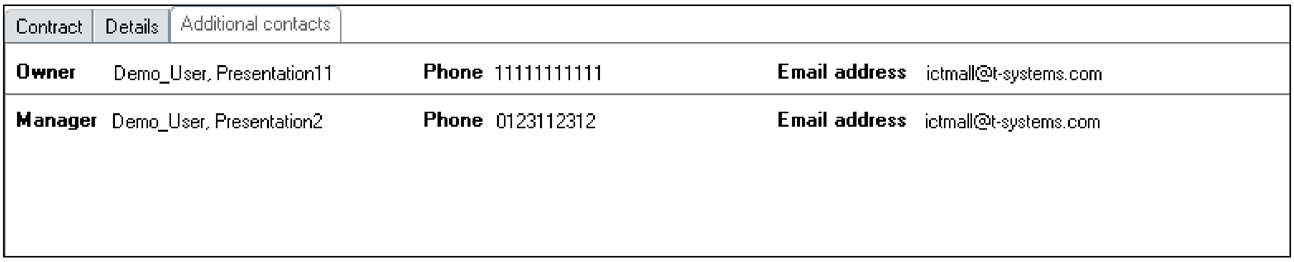


Fig. 201 Commercial Inventory Management - Contract Info Tab: Additional contacts

The tab “Additional contacts” shows the owner with contact information and the manager with contact information.

Contract Components Area

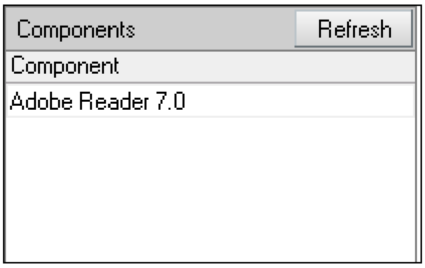


Fig. 202 Commercial Inventory Management - Contract Components Area

In this area the components of the related contract are displayed.

4 Authentication und authorization

4.1 Authentication

The following table contains all current available roles in the webSRM configuration.

Role	Function	Application
CM Reporting	Reports	Configuration Management
CM_Data_Import	Import system data	Configuration Management
Commercial_Inventory_Manager	Cancel additional posting	Commercial Inventory Management
	Close additional posting	
	Close complaints	
	Components loss	
	Manage advanced search filters	
	Edit contract	
	Create contract	
	Close contract	
Contact Manager	New contact	Service Level Management

	Manage contacts	
Cust_LBU_Administrator	Manage additional team membership	LBU Administration
	Manage user profiles	
Customer_asset_view	Search for system/component	Configuration Management
	Manage advanced search filters	
	Print label	
	Download systems/components	
	Inventory Viewer	Task Management
Customer_own_support_team	Work in progress	Task Management
	Assign task to remote	
	Manage contacts	
	Manage attachments	
	Assign task	
	Manage related system	
	Edit task	
	Show related system	
	Print	
	Close task	
	Manage advanced search filters	
	New contact	
	Asset-Info to worklog	
	Back to ServiceDesk	
	Customer contacts	
	Show history	
	Show related incident	
	Assign task to myself	
	Service request details	
IM_VIEW	Manage advanced search filters	Incident Management
	Show related tasks	
	Show history	
	Reports	
Incident_Manager	Suspend ticket	Task Management
	Send message	
LBU Administration	Manage advanced search filters	LBU Administration
	Manage roles	
	Request user deactivation	
	Change team	
	Manage user profiles	
	Manage shipment addresses	
	Manage assignment team lists	
	LBU overview	
	Manage additional team membership	
	New team	
	New employee	
	Transfer employee	
	Manage LBU teams	
LBU Subadministration	Change team	LBU Administration
	LBU overview	
	Transfer employee	
	Manage roles	
LBU_permission_config	Manage LBU roles	LBU Administration

Local_Asset_Manager_Non_MDS	Reports	Configuration Management
	Manage advanced search filters	
	Manage stock threshold	
	Create system/component	
	Search for system/component	
	Activate system/component	
	Lost component	
	Delete component	
	Transfer component	
	Edit Component	
	Manage stocks	
	Edit component attributes	
	Edit system	
	Show related tasks	
	Repair component	
	Print label	
	Deactivate system/component	
	Download systems/components	
MDS_FS_dispatcher	Download Service requests	Service Request Management
	Service request details	
	Edit service request	
	Cancel service request	
	Create tasks	
	Reject service request	
	Print	
	Show related tasks	
	Manage attachments	
	Accept service request	
	Assign service request	
	Manage shopping cart	
	Show mails	
	Close service request	
	Enter configuration parameters	
	Request predefined search	
	Manage advanced search filters	Task Management
	Update CMDB - System	
	Assign task to remote	
	Cancel service provider task	
MDS_FS_spare_part_switch	Update CMDB - Swap	Task Management
MDS_FS_technician	Download systems/components	Configuration Management
	Edit system	
	Print	Task Management
	Manage attachments	
	Manage shopping cart	
	Asset-Info to worklog	
	Update CMDB - System	
	Cancel task	
	Customer contacts	
	Back to ServiceDesk	
	New contact	
	Task Scheduler	
	Assign task to remote	

	Copy task	
	Work in progress	
	Task disposition	
	Show related incident	
	Show history	
	Logistics coordination	
	Manage advanced search filters	
	Inventory Viewer	
	Show related system	
	Update CMDB - Move	
	Assign task to myself	
	Reopen task	
	Edit task	
	Update CMDB - Dispose	
	Edit installation parameter	
	Show activities	
	Edit component attributes	
	Request predefined search	
	Assign task	
	Search for system/component	
	Update CMDB - Install/Add	
	Edit Component	
	Service request details	
	Manage contacts	
	Download tasks	
	Cancel service provider task	
	Show related service request	
	Manage related system	
	Subsequent delivery	
	Close task	
MDS_RS_dispatcher	Manage attachments	Service Request Management
	Service request details	
	Cancel service request	
	Reject service request	
	Download Service requests	
	Edit service request	
	Close service request	
	Print	
	Request predefined search	
	Show mails	
	Enter configuration parameters	
	Show related tasks	
	Manage shopping cart	
	Assign service request	
	Create tasks	
	Accept service request	
	Cancel service provider task	Task Management
	Update CMDB - System	
	Manage advanced search filters	
	Assign task to remote	
MDS_RS_technician	Edit system	Configuration Management
	Download systems/components	

	Show history	Task Management
	Update CMDB - Move	
	Task Scheduler	
	Manage advanced search filters	
	Show related system	
	Cancel task	
	Show related service request	
	Manage contacts	
	Show related incident	
	Inventory Viewer	
	Download tasks	
	Edit component attributes	
	Manage related system	
	Asset-Info to worklog	
	Print	
	Search for system/component	
	Back to ServiceDesk	
	Close task	
	Work in progress	
	New contact	
	Task disposition	
	Update CMDB - Install/Add	
	Assign task	
	Copy task	
	Request predefined search	
	Reopen task	
	Update CMDB - System	
	Subsequent delivery	
	Logistics coordination	
	Assign task to remote	
	Service request details	
	Update CMDB - Dispose	
	Edit installation parameter	
	Manage shopping cart	
	Edit system	
	Manage attachments	
	Edit Component	
	Customer contacts	
	Edit task	
	Cancel service provider task	
MOOS	MOOS Console	Task Management
Service Level Management	Manage customer	Service Level Management
	Manage supply chain	
	Manage SLM companies	
	New location	
	Manage service organisation	
	Manage advanced search filters	
	Manage locations	
	Manage cost center	
	Manage customer menus	
	New customer	
	Manage contacts	

	Edit bank holidays	
	Manage wbs elements	
	Create common user request	
	Customize functions	
	Manage delay causes	
	Customer overview	
	New contact	
ServiceDesk	Show related tasks	Service Request Management
	Show related service request	Task Management
SLM Reporting	Reports	Service Level Management
SLM_permission_config	Manage SLM roles	Service Level Management
Store_Logistic	Manage goods receipt and issue	Configuration Management

4.2 Authorization

Role	Right
MDS_FS_dispatcher	-
MDS_FS_incident_solver_remote	-
MDS_FS_incident_solver_onsite	-
MDS_FS_spare_part_switch	-
MDS_FS_technician	-
MDS_RS_dispatcher	-
MDS_RS_technician	-
MDS_SRM_Dispo	-

The roles are based on the current configuration (MDS).

5 Appendix

5.1 Pre-settings

5.1.1 Task status

Pre-defined values:

- Assigned
- Work in progress
- Done
- Closed

5.1.2 Service request status

Pre-defined values:

- New
- Work in progress
- Done
- Checked
- Closed