# Maintenance Module "Kanban4KIX"

# Installation and configuration

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## Imprint

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# Table of contents

# 1 General advices

## 1.1 Document information

### 1.1.1 Objectives

This document contains all the information to install and configure the c.a.p.e. IT Maintenance Module "Kanban4KIX" for KIX Professional.

## 1.2 Changes

### 1.2.1 Change history

| Version | Date | Changed chapters | Short description | Changed by |
|---------|------|------------------|-------------------|------------|
| 1.0.0 | 02.10.15 | All | document creation | Ricky Kaiser |
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| 1.0.1 | 27.10.15 | 2.3 | added group explanation | Ricky Kaiser |
| 1.1.0 | 11.12.15 | 2.4 and 3.2.2 | added 2.4, changed 3.2.2 | Ricky Kaiser |
| 1.2.0 | 18.12.15 | 3.1.15 | removed | Ricky Kaiser |
| 1.3.0 | 12.12.16 | 2.5, 3.1.3, 3.1.4, 3.1.5, 3.1.6 | changed 3.1.3 and 3.1.4, added 2.5, 3.1.5 and 3.1.6 | Ricky Kaiser |
| 1.3.0 | 14.12.16 | 3.2.2 | changed filter attribute description | Ricky Kaiser |
| 17.0.0 | 05.02.17 | all | Updated for KIX Professional 17.0.0 | Rene Boehm |

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### 1.2.3 Document owner

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## 1.3 List of abbreviations

CLI             Command Line Interface

GUI             Graphical User Interface

# 2 Installation

## 2.1 Requirements

To install and use the Maintenance Module "Kanban4KIX" your installation environment needs to fulfill the following requirements:

- a KIX Professional 17.0.x installation

## 2.2 Package Installation

Just install the Maintenance Module „Kanban4KIX" via your operating systems package management. The package name is „kixpro-kanban". Please make sure you have fulfilled the necessary requirements (see 2.1).

## 2.3 New groups

During installation, two new groups are created. The group "kanbanview" give access to the Kanban View and its configuration. With read-only rights (ro) the Kanban View can be viewed, with write access (rw), the tickets can also be moved. The group "kanbanview_dispatchSidebar" allows access to the sidebar 'tickets to Dispatch' (see chapter 3.1.1). The first user (default: root@localhost) automatically gets write access for both groups.

## 2.4 New tables

During installation, two new tables are created in the database. The table "kanban4kix_shared_sets" contains all views that users share with other agents and the table "kanban4kix_subscribed_sets" contains the view subscriptions.

# 3 Configuration

## 3.1 SysConfig Options

After you have installed the package, you can adjust the basic parameters if necessary.

To configure the extension just open the SysConfig in the admin area. Select the SysConfig group "Kanban4KIX". After the page reload select one of the subgroups "Frontend::Agent::KanbanView" or
"Frontend::Agent::AgentKanbanActionCommonPopup".

A default configuration is already included in the package. You can change it to your needs. The following section lists the SysConfig options.

### 3.1.1    Kanban sidebar "Tickets to dispatch"

SysConfig Option: Frontend::KanbanSidebarBackend###Dispatch

This option activates the sidebar 'Tickets to dispatch' in the Kanban View. With the key 'Group' you can configure in which group the user has to be to use this sidebar. To dispatch the contained tickets in the sidebar the agent must also have permissions for the change popup
(option: "Frontend::Module###AgentKanbanActionCommonPopup").

**Please note:**
The default value for 'Group' is "kanbanview_dispatchSidebar".

### 3.1.2    Normalize the columns

SysConfig Option: AgentKanbanView::NormalizeColWidth

With this option you can configure whether the columns should have the same width.

**Please note:**
This option is required and the default value is "No".

### 3.1.3    Ticket widget head area

SysConfig Option: AgentKanbanView::CardContent::HeadArea

With this option you can specify, which ticket attributes should be visible in the head area of the ticket card in Kanban View. Key is used for ordering the attributes.

**Please note:**
This option is required. Dynamic fields have to be given like "DynamicField_*". Link behavior has changed, see chapter Fehler: Referenz nicht gefunden.

### 3.1.4    Ticket widget content area

SysConfig Option: AgentKanbanView::CardContent::ContentArea

With this option you can specify which ticket attributes should be visible in the content area of the ticket card in Kanban View. Key is used for ordering.
**Please note:**
This option is required. Dynamic fields have to be given like "DynamicField_*".

### 3.1.5    Dynamic links for attributes

SysConfig Option: AgentKanbanView::CardContent::AttributeAsLink

With this option you can define a specific link for the attribute in head and content area (see chapters 3.1.3 and 3.1.4), e.g. to open the relevant ticket: "index.pl?Action=AgentTicketZoom;TicketID=<TICKET_TicketID>". As placeholders are possible: "<TICKET_*>" (for ticket attributes); "<CONFIG_*>" (for sysconfig options) and "<ENV_*>" (for environment variables). External links need the protocol (e.g. "http://www.somesite.com")

### 3.1.6    Dummy attributes

SysConfig Option: AgentKanbanView::CardContent::DummyAttribute

With this option you can define a dummy attribute (e.g. for ticket independent links). Key is the dummy identifier and value the visible text in the kanban ticket. The relevant dummy (Key) have to be used in 'AgentKanbanView::CardContent::HeadArea' (or '...ContentArea'), to be visible.

### 3.1.7    Ticket widget progress data

SysConfig Option: AgentKanbanView::CardContent::ProgressBar

With this option you can enter additional ticket attributes which should be visible as a progress bar after the content area of the ticket card in the Kanban View. Key is used for ordering.

**Please note:**
This option is required.

### 3.1.8    Meta states as columns

SysConfig Option: AgentKanbanView::TicketMetaStates

With this option you can configure the columns and their corresponding states. The states are just defaults and will be overwritten with the personal adjustments in the Kanban View configuration. All states should exist and must only be separated by comma (no additional whitespaces). A state can only be in one column, so the first appearance counts.

**Please note:**
This option is required.

### 3.1.9    Ticket type specific colors

SysConfig Option: AgentKanbanView::TicketType::Colors

With this option you can configure a color for a specific ticket type. This option will overwrite the color declarations from the CSS class in "AgentKanbanView::TicketType::CSSClass" for the same ticket type.

**Please note:**
This option is required.

### 3.1.10  Ticket type specific CSS classes

SysConfig Option: AgentKanbanView::TicketType::CSSClass

With this option you can configure a CSS class for a specific ticket type. Color declarations will be overwritten by "AgentKanbanView::TicketType::Colors".

### 3.1.11  Dynamic Fields as Swimlanes

SysConfig Option: AgentKanbanView::DynamicFieldsAsSwimlanes

With this option you can specify relevant dynamic fields which should be used as swimlane attributes.

**Please note:**
This option is required. Fields of object "Article" are not possible and also fields of type "Date / Time", "Multiselect" and "Textarea" are not feasible.

### 3.1.12  Limit of tickets in Kanban View

SysConfig Option: AgentKanbanView::SearchLimit

With this option you can specify how many tickets are maximally shown in the lists (sidebar and ticket type groups) and as tickets blocks in the Kanban View.

**Please note:**
This option is required and only numbers are possible.

### 3.1.13  Permission for change popup

SysConfig Option: Ticket::Frontend::AgentKanbanActionCommonPopup###Permission

With this option you can define the required ticket permissions to change the configured attributes (see option 3.1.15) with the change popup in Kanban View.

**Please note:**
This option is required.

### 3.1.14  Set required lock

SysConfig Option:
Ticket::Frontend::AgentKanbanActionCommonPopup###RequiredLock

With this option you can configure whether a ticket lock is required to use the change popup of the agent interface in Kanban View. If the ticket isn't locked yet, the ticket gets locked and the current agent will be automatically set as its owner.

**Please note:**
The default value is "No".

### 3.1.15  Change several ticket attributes and dynamic fields

SysConfig Option:
Ticket::Frontend::AgentKanbanActionCommonPopup###…
Ticket::Frontend::AgentKanbanActionCommonPopup###DynamicField

With these options you can configure whether a user can change the relevant ticket attribute in the change popup in Kanban View.

### 3.1.16  Show the incident state of the ticket service

SysConfig Option:
Ticket::Frontend::AgentKanbanActionCommonPopup###ShowIncidentState

With this option you can configure whether the current incident state of the service of the ticket should be shown in the change popup in Kanban View.

**<u>Please note:</u>**
This option is required and the default value is "Yes".

### 3.1.17  Next possible state types

SysConfig Option: Ticket::Frontend::AgentKanbanActionCommonPopup###StateType

With this option you can configure the next possible state types of a ticket for change popup in Kanban View.

**<u>Please note:</u>**
This option is required.

### 3.1.18  Add a new article

SysConfig Option: Ticket::Frontend::AgentKanbanActionCommonPopup###Note

With this option you can configure whether the user can add a note to the ticket within the change popup in Kanban View.

**<u>Please note:</u>**
The default value is "Yes".

### 3.1.19  Note can be mandatory

SysConfig Option:
Ticket::Frontend::AgentKanbanActionCommonPopup###NoteMandatory

With this option you can specify whether a note has to be created for the changes, so the user have to fill in the subject and body in the change popup in Kanban View.

**<u>Please note:</u>**
The default value is "No". Only takes effect if option 3.1.18 is active. Can be overwritten by the option "Ticket::Frontend::NeedAccountedTime".

### 3.1.20  Default subject and body for note

SysConfig Options:
Ticket::Frontend::AgentKanbanActionCommonPopup###Subject
Ticket::Frontend::AgentKanbanActionCommonPopup###Body

With these options you can specify defaults for the subject and body of the note which can be created with the change popup in Kanban View.

### 3.1.21  Size of the note body input field

SysConfig Options:
Ticket::Frontend::AgentKanbanActionCommonPopup::TextAreaNoteCols
Ticket::Frontend::AgentKanbanActionCommonPopup::TextAreaNoteRows

With these option you can specify the default size of the note body input field in the change popup in Kanban View. If richtext is disabled the values represent the number of lines and columns (characters per line) else the size will be calculated in pixels (cols multiplied by 10 and rows multiplied by 20).

**Please note:**
These options are required and the default values are 60 and 10.

### 3.1.22  Default article type

SysConfig Option:
Ticket::Frontend::AgentKanbanActionCommonPopup###ArticleTypeDefault

With this option you can specify the type of the article which can be created with the change popup in Kanban View.

**Please note:**
The default value is "note-internal".

### 3.1.23  Possible article types

SysConfig Option:
Ticket::Frontend::AgentKanbanActionCommonPopup###ArticleTypes

With this option you can configure the possible types for the article which can be created with the change popup in Kanban View. If this option is deactivated, the type in option 3.1.22 will be used for the new article.

### 3.1.24  History type

SysConfig Option:
Ticket::Frontend::AgentKanbanActionCommonPopup###HistoryType

With this option you can specify the history type for the change action, which will be used for ticket history in the agent interface.

**Please note:**
The default value is "AddNote".

### 3.1.25 History comment

SysConfig Option:
Ticket::Frontend::AgentKanbanActionCommonPopup###HistoryComment

With this option you can specify the history comment for the change action, which will be used for ticket history in the agent interface.

**Please note:**
The default value is "%%Note".
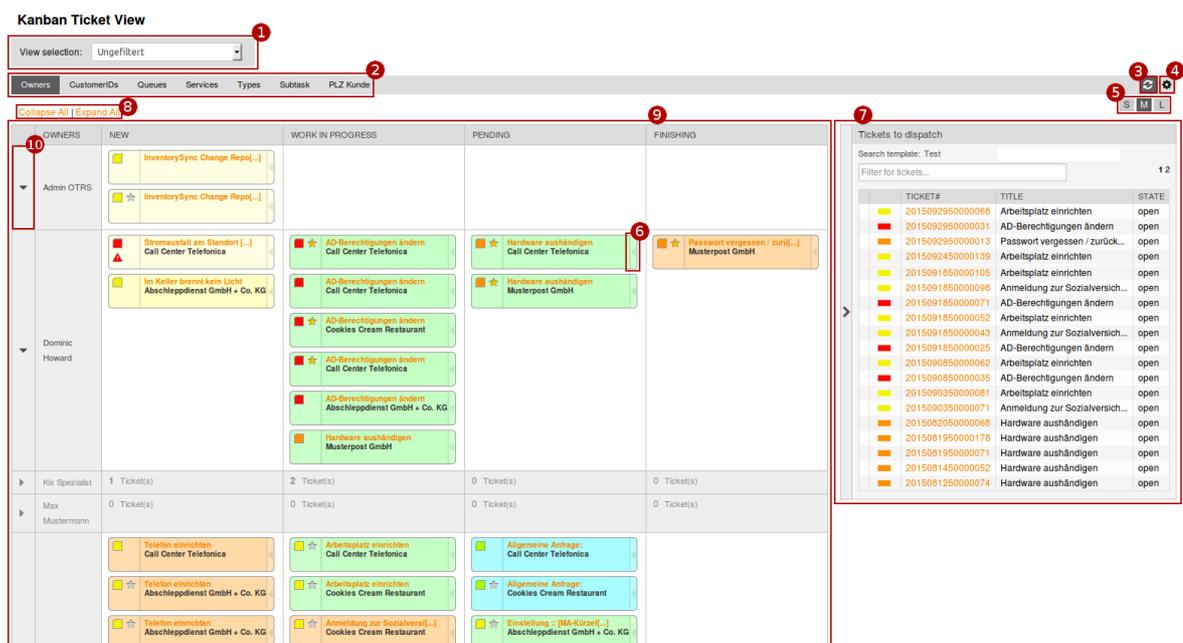
# 3.2 Usage of Kanban4KIX

## 3.2.1 Kanban View

This screen is the main view of Kanban4KIX. Here you can select a stored view [1] (see the next chapter). This dropdown menu is only available if at least two views exist. In the line below [2] you can select the desired swimlane (rows). By default only "Owner", "CustomerIDs", "Queues", "Services" and "Types" are available. But you can define some further options in the SysConfig (see chapter 3.1.11). On the right side of this line, there are the refresh button [3] and the link to the kanban configuration [4] (see next chapter).

Below you can switch between the zoom levels [5]. In the "L" (large) view you can see all the specified attributes (see chapter 3.1.3, 3.1.4 and 3.1.7). In "M" (middle) view only the head section of the tickets is displayed. To have all configured ticket information also in this view, you can open the ticket functions [6] (hover this area) and click on the magnifier. The eye opens the respective ticket. With the "S" (small) view, the individual tickets are grouped according to their type, in order to get a good overview.

Below the zoom level selection is the sidebar with the dispatchable tickets [7] (if you have the necessary permissions in the corresponding group, see chapter 3.1.1). Using the link that appears when you are hovering the header area of the sidebar, you can specify a search template for the tickets in the sidebar and the number of tickets per page of the sidebar.

With the two links [8] above the kanban table [9] you can collapse or expand all swimlanes, or individually with a click in their first column [10].

To assign a ticket to another swimlane or another status group (column), click and hold a ticket and move it to the new location (cell) and let it drop. After this the change popup will open with some changeable (partly necessary) ticket attributes. Likewise, you can proceed with the tickets in the sidebar.

### 3.2.2 Kanban Configuration

Here you can enter your personal settings, what you want to see in the Kanban View. In the first section, you can select a search template, by which the tickets are searched for the Kanban View. In the second widget, you can select values as filter criteria which will be used to search for the tickets (selectable via drag and drop). But keep in mind that the search template and these criteria are alternative to each other. That means, either you use a search template or these search criteria.

In the third section, you can define the status per column that tickets need to have. These settings are taken even when using a search template. If no status is specified for a column, no tickets can be moved in this column in Kanban View.

In the last section some further adjustments are feasible, such as parameters for sorting of the tickets and the time until a refresh occurs (if enabled).

In the left sidebar, you can select another view oder create a new one and save your settings. Also you can rename existing views, delete them, share them with other agents or you subscribe to views of another agents.

To save the settings in a new view, click on an empty "slot" in the left sidebar. An empty slot is marked with a "-" [1]. A nearly empty configuration will be loaded. After this make your adjustments and press "Save" [2] if you want to stay in this screen or "Save and back to Kanban View" [3] if you want to see the result of your new configuration in the Kanban View.
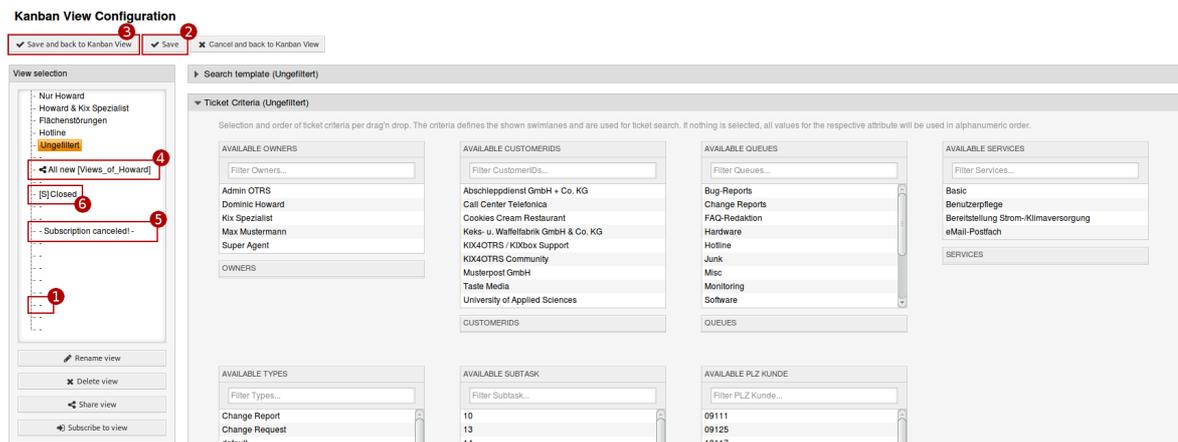


If you want to share a view, load it and click on the button "Share view". In the appeared dialog, select an existent category or enter a new one and submit. The selected view will marked as a shared one [4] with the chosen category behind it. From now on, other agents can copy and subscribe to your view. Also the button "Share view" is changed into the button "Change category / stop sharing".
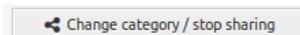


If you click on this button, you can specify another category (like sharing a view) or stop sharing.
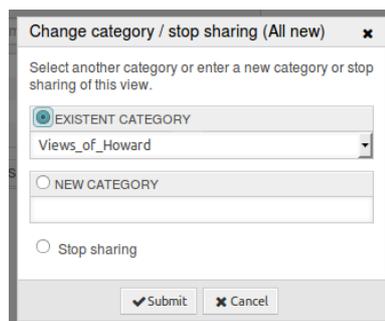
If you stop sharing or you delete your view or you subscribe to a view of another agent with this view, all agents who have a subscription to your view can not use this view anymore (the subscription will be canceled). They will also see a hint [5] as name of the relevant view in their "View selection" lists (not in Kanban View, the view is there no longer available). If they click on it, it will behave like an empty / new view.

If you want to copy or subscribe to a view of another agent, use the button "Subscribe to view" But you do not need to load the view that should be the subscription, you can pick the appropriate view in the dialog. Also select a category, a shared view and choose whether you want to subscribe to it or copy it.
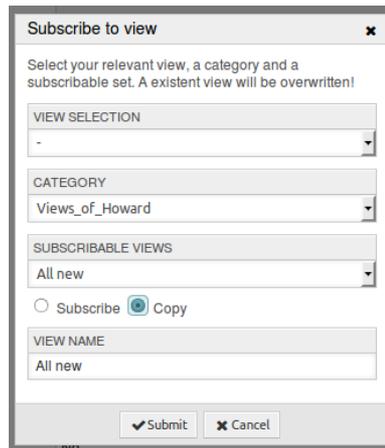


If you want to copy a shared view you can also give your copy another name in the dialog. If you done a subscription, the relevant view is marked with "[S]" and gets the name of the shared view [6]. It is not allowed to rename or share this view because of the subscription. If you make any changes in the configuration of a subscription and want to save them use one of the save buttons. But keep in mind, that this view will become your own view and lost its subscription. So to simply go back to the Kanban View without the lost of the subscription, use the button "Cancel and back to Kanban View" [7] and not the save buttons (the subscription was created on submit and do not need to be "saved").

Moreover, you should know how the handling of search templates works if you copy or subscribe to a shared view.

| Type of your view | Template belongs to view owner | Template belongs to another agent |
|---|---|---|
| Copy | Template is copied[*] | Template is subscribed[*] |
| Subscription | Template is "subscribed" only for this view[**] | Template is "subscribed" only for this view[**] |
| New view out of subscription (subscription is saved) | If you have a subscription to relevant template: → subscription is used | Template is subscribed[*] (if it was not already) |
| | If you have **no** subscription to relevant template: → template is copied[*] | |

[*] Existing templates with same name will be overwritten.
[**] Vanishes if subscription is canceled. Existing templates are not affected.