Admins

C2 ITSM version 4.11

Administrator Guide

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Term	Definition
Action	An action in C2 ITSM represents a command that the system execute based on an associated trigger.
Application	The C2 ITSM application is the part of the tool that is accessible to resources, administrators, and managers for managing requests.
Assignment	An assignment allows a ticket or task to be sent to a group or user to perform a processing action.
Attribute	An attribute is a piece of information about a configuration item. For example, it can be the name, location, version number or cost of an equipment.
Category	A category is a grouping of items that have attributes in common. Examples of categories: Infrastructure Management, IT Support, Human Resources.
Client	A client is anyone authorized to open a ticket by either speaking with a resource or directly through the portal.
Concurrent access	Concurrent access or simultaneous access is a unit of measurement that represents users accessing the application at the same time.
Configuration	The term configuration is used generically to describe a group of Configuration Items (CIs) that work together to provide an IT service or a recognizable part of an IT service. It is also used to describe the settings of one or more CIs.
Configuration items (CI)	A Configuration Item (CI) is a CMDB element to which you can assign many customized attributes. Configuration Items (CIs) represents the enterprise's assets. Examples of CIs related to IT support: Lexmark 5200 Printer, Dell Inspiron 5520 Laptop

Configuration Management Database (CMDB)	The Configuration Management Database (CMDB) is a set of processes for managing service assets and configurations to record information about configuration items (CIs).
Custom field	A custom field is a field not provided by the system. It can be configured to contain additional information or attributes that can be added to a request, client record or CI. Examples related to a material purchase request: Brand, model, serial number
Dashboard	A dashboard is a graphical representation of a service's overall performance and availability. These charts can be updated in real time and added to management reports and web pages.
Enterprise	An enterprise represents a group of clients. For example, it can be a location, department, company, or organization.
Entities	Entities are objects on which automation can be applied. Examples: Clients, enterprises, CIs, resources, requests, tasks.
Field	A field is an interface element that can be filled in either by a configured context-sensitive drop-down list or a blank input field.
Filter	A filter sorts the visible elements in a grid based on the selected criteria.
Form	A form can take many shapes in C2 ITSM. For example, it can be a predefined document with fields in which a client or resource enters the requested information.
Grid	A grid is a part of the user interface that groups different menu items in a column.
Group	A group represents a set of people with the same rights, permissions, and access.
Impact	An impact is the measure of the effect of an incident, problem or change on business processes.

Imports	Imports are lists of text data extracted from an application, in order to be able to execute said data on another program.
Incident	An incident is an event that is not part of the standard operation of a service and that causes an interruption or decrease in the quality of that service. It can be solved by implementing a workaround. Examples of incidents: Improper function of a printer > printing on another machine. Non-functional telephone line > use a mobile phone.
Knowledge base	A knowledge base consists of a database containing knowledge specific to a specialized domain, in a form that can be used by an application's query string.
List	A list represents an ordered sequence of items used as the basic structure in system fields or custom fields.
List items	List items represent a word or group of words associated with a drop-down list in the C2 ITSM interface.
Metric	A metric represents what is measured and reported on to help manage a process, an IT department, or an activity.
Planned downtime	An agreed-upon period during which a service is not available. Planned downtime is often used for maintenance, upgrades, or testing.
Portal	The portal is the web interface for the consumption of the service catalog by clients.
Priorities	Priorities allow for the management of priority matrices related to service agreements. Impact and urgency are used by the system to assign priority.
Problem	Cause of one or more incidents, known or unknown, that occurred at the time an incident was recorded.
Process	A process refers to a set of business rules that are automatically executed by the application to achieve a specific goal.

	A process automates event-driven elements and can be executed once or several times. It applies to different entities in C2 ITSM that generate one or more actions. A process handles one or more defined sources (inputs) and transforms them into results (outputs). A process may include the definition of roles, responsibilities, tools, and management controls necessary to reliably resolve and produce results. A process may also include policies, standards, best practice guides, activities, and work instructions, if required.
Queue	A queue is a data structure for grouping requests, depending on the resource team responsible for it. The queues visible on the resource application are accessible according to the groups in which they are associated.
Relation	A relation refers to a link between two configuration items that defines a dependency or connection between them.
Request	A request represents a formal inquiry by a user for a service to be provided. It can be an incident, a service request, a change request, or a problem. Examples: Request access to a color printer, Request a new mobile phone
Resolution	A resolution is the action of resolving the root cause of an incident or problem by implementing a permanent solution or workaround.
Resource	A resource is anyone authorized to access the C2 ITSM application to create or manage tickets and tasks.
Server	A server refers to a computer device connected to a network that provides software functions used by other computers.
Service	A service represents a grouping of requests that have a common element and may have a schedule that differs from that of an enterprise.

	A service is considered as a CI in the database, it is possible to add additional attributes to it. Example of IT services: Printing service, Telephony service
Service catalog	The Service Catalog contains information on all services in operation and those available for deployment. The Service Catalog is the only section of the service portfolio that is public to clients. The Service Catalog includes information on deliverables, pricing, contact points, ordering and request processes.
Service hours	Service hours represent an agreed-upon period during which a specific service must be available to users.
Service level	The service level represents the measured and reported achievement of one or more targets and defines the client's expectations of the provider in terms of response time, resolution time and quality of service.
Service Level Agreement (SLA)	A Service Level Agreement (SLA) is an agreement between a service provider and a client. It describes the service, documents the service-level targets, response time and specifies the responsibilities of the service provider and the client.
Service Provider	A service provider is an organization that provides services to one or more internal or external clients.
Tag	A tag is a syntactic unit that allows you to retrieve information captured in C2 ITSM. For example: Using the [Custom181/] tag retrieves information from a custom field with the number 00000181.
Target	A target represents the entity to which you can apply configurations in the various C2 ITSM menus.
Task	A task represents an activity in the process of a request that requires an action to be performed by a resource or a client to fulfill the request.

	Example of tasks related to a request for accessing a color printer: Request approval, Give access rights to the color printer, Validate that the color printing is functional.
Template	A template represents an editable and reusable layout.
Ticket	A ticket is synonymous with a request, representing the concretization of the request addressing a service need or an incident and allowing the processing and follow-up of the request.
Urgency	Urgency is the measure of time that defines how an incident, problem or change affects, significantly or not, the services of an enterprise.
User	A user represents anyone who can access C2 ITSM using an active license. Users in C2 are split into two types: clients and resources.
Workaround	A workaround represents a temporary measure whereby the business process operates without the use of the usual services.

1. Introduction

The goal of this guide is to assist you as an administrator in configuring the IT Service Management tool, C2 ITSM.

To meet your business needs, this guide contains the concepts, relations and configurations that are available to you in C2 ITSM.

1.1. Relations in C2 ITSM

C2 ITSM is based on the relations and management between the different entities that make it up. The relations can be grouped under three main categories, users, service catalogs and the configuration management database (CMDB).

This section contains an overview of the relation concepts in C2.

1.1.1. Relations between users

Users in C2 are split into two types: clients and resources.

Clients are users who consume services in the form of requests, which in turn create tickets. Clients are grouped under one or more enterprises. The same client can be associated with multiple enterprises.

- For example, a nurse who is part of a hospital network may have to make requests in several different hospitals. In this case, each hospital represents a separate enterprise in C2 with which the client is associated.

Resources are the users who process the tickets created by clients. Resource accounts in C2 are clients with expanded roles and permission.

> *Note: You can configure roles and permission for resources from the management menus. For more details, please refer to the section:* *2. Managing Users.*

1.1.2. Service catalog relations

To soundly manage the requests available to your clients in C2, they must be configured and grouped in one or more service catalogs.

You can then associate service catalogs with enterprises, groups of resources or even a resource or client directly.

1.1.3. CMDB relations

The CMDB offers an overview of your organization and all its assets. It lets you manage and configure all your Configuration Items (CIs) and their relations to clients, resources, and enterprises.

You can use it for both management and automation of the configuration item (CI) inventory.

- For example, a monthly preventive maintenance that query various attributes on the CIs and runs the required actions based on its configurations.

It also provides the necessary information on the impacts and relations of the various components.

- For example, when a network switch is turned off, it is possible to view the impact on the CIs affected by this shutdown.

1.2. Accessing C2 ITSM

C2 ITSM has two web interfaces to access the platform: the Application interface and the Portal interface, both of which are accessible from your browser.

Officially supported browsers:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge (same codebase as Google Chrome)

We recommend using the most up-to-date versions.

> *Note: You can use other browsers, but C2 may not work as intended.*

An Internet connection is required to access the C2 login page. The URL to access the platform is unique to your enterprise and requires authentication for each user.

1.2.1. Accessing the application

In C2, the application is the interface through which administrators can fully configure this tool. Resources can also use it to process tickets and tasks generated by clients.

Follow these steps to access the application:

1. Access your C2 instance's URL from your browser.
    a. Example: https://yourinstance.c2atom.com/
2. Log in using your username and password or single sign-on (SSO) authentication.

Mobile mode

Mobile mode is accessible to resources and is primarily designed for those traveling and needing to access tickets from a mobile device or tablet.

You must add /mobile to your C2 instance's URL to access it.

Example: https://yourinstance.c2atom.com/mobile

Mobile mode is limited to managing and creating tickets. You must use the regular application link to access C2's full suite of features.

1.2.2. Accessing the portal

In C2, the portal is the web interface through which clients (IE: end users) make requests using the service catalog.

Follow these steps to access the portal:

1. Access your C2 instance's URL from your browser.
2. Log in using your username and password or single sign-on (SSO) authentication.

> *Note: Users with access to the application can switch from one interface to another using the profile menu.*

1.2.3. Authentication types

Two means of authentication are available to you either through Windows with single sign-on (SSO) authentication or through the database.

To use single sign-on (SSO) authentication in Windows, you need to configure the external login mode in your advanced settings. For more details, please refer to section 9.11.17 External identification (SSO).

Database mode requires a username and password to open a session. The username and password configurations are done from the client form. For more details, please refer to section: 2.2 Managing your clients.

1.3. Navigating in C2 ITSM

C2 ITSM has two web interfaces available to you: the application and the **portal**.

There are three main sections for each of these interfaces:

- Menu bar
- Navigation tabs
- Tab contents

C2 uses tab navigation, i.e.: each menu opens a new tab inside the C2 window.

1.3.1. The application homepage

Since managing tickets is C2 ITSM's main feature, upon logging in to the application, the homepage automatically open on the "Tickets Grid" tab. Resources manage the tickets based on their clients' requests in this screen.

> *Note: The Tickets tab is the only tab that cannot be closed or removed.*

1.3.2. The portal homepage

When the portal opens, two tabs will be shown: Home and My Requests.

You can do the following in the **home** tab:

- Search in the available request catalog
- Search in the knowledge base
- Access shortcuts to New Requests, My Requests, and the Knowledge Base

You can do the following in the **My Request** tab:

- See a complete list of your requests

- Show open or closed requests.
- Create a new request

> *Note: The Home and My request tabs cannot be closed or removed.*

1.3.3. Using the menu bar

The menu bar is a component that is present in both C2 ITSM interfaces. However, its visual and the options available to you differ between the application and the portal.

In the application, the menu bar contains to the following items:

- Contextual menus based on the user's access role
- Quick search tool
- Chat
- Notifications
- Options for your profile
- Help features on/off button

In the portal, the menu bar contains to the following items:

- Options for your profile
- Knowledge base
- Notifications
- Quick search

1.4. Using the profile menu

The application's profile menu is unique to each user. To access it, you must click on the button represented by an icon containing the first letters of your first and last name or by a profile picture.

This section contains the options associated with this menu.

1.4.1. Dark theme

This button lets you toggle between standard and dark theme.

1.4.2. Availability status

This option allows you to choose your availability status as a resource.

Availability status has a direct impact on ticket management and reception.

- For example, if a resource's availability status is set to Unavailable, tickets cannot be assigned to it.

> *Note: Available statuses are based on the items in the Resource Status list. Please refer to section 4.2 Managing your list items for more details on editing availability statuses.*

1.4.3. My activities

This menu opens in a new tab and displays the user's activity history and is for viewing purposes only. This view is unique to the user and cannot be exported.

1.4.4. Timesheet

This menu opens in a new tab and shows a calendar view to fill in your timesheet.

> *Note: Depending on the access rights associated to the resource, you can allow them to fill in another user's timesheet.*

1.4.5. My options

This menu opens in a new tab and allows you to access customization menus grouped under three sections:

- The User section contains the menus: Profile picture, Password, and Filters.
- The My Templates section contains the menus: Search and Grid.
- The Customization section contains the menu: Other preferences.

1.4.5.1. Profile picture

This menu opens in a pop-up window and allows you to upload an image to C2 and frame it for use as your profile picture.

1.4.5.2. Password

This menu opens in a pop-up window and allows you to change your password.

To change your password, you must type in your old password, a new password and confirm it again. Your new password must contain at least six characters.

> *Note: This option has no impact if your C2 instance is using the AD login mode.*

1.4.5.3. Filters

This menu allows you to create personal filter templates to add to the side pane of the various menus based on the selected target.

The available targets are Tickets, CIs, Clients, Enterprises.

For example, when you create a filter with the target "Tickets," it will be added to your available filters from the side pane of the main "Tickets" tab.

To create a new personal filter, you must press the "Create" button and fill in the appropriate fields. For more details on the fields to be filled in, please refer to the section: 5.3.2 Creating a filter template.

1.4.5.4. Search

This menu allows you to create custom search templates based on your desired conditions. You can use your search templates in the "Advanced Search" of the ticket grid, in the dashboards as well as in the search menu of the menu bar.

To create a new search template, you must press the "Create" button and fill in the appropriate fields. For more details on the fields to be filled in, please refer to the section: 5.4.2 Create a search template.

1.4.5.5. Grid

This menu allows you to create or modify your personal grid templates.

When creating a grid template, you must choose its target. The available targets are: “Client,” “Enterprise,” “Ticket” or “CI.” Depending on the target you define, the grid is available in the appropriate C2 menu.

To create a new grid template, you must press the “Create” button and fill in the appropriate fields. For more details on the fields to be filled in, please refer to the section: 5.5.2 Creating a grid template.

1.4.5.6. Other preferences

This menu allows you to choose your preferences regarding navigation in the tool.

You can also define, when opening a ticket, which sections of it must be open or closed as well as their orders.

This menu is divided into four sections:

- General provision
- Client
- Ticket
- Cis

Here are the details for each section:

General Provision Section

This section allows you to configure settings for the following two options:

- Show grouping columns: This option allows you to specify whether you want to keep a column displayed in the grid when it is grouped.
- Regional format: This option allows you to select the regional format for the export of tickets, customers, companies, or CIs. This format is associated with the CSV file that the system generates.

Client Section

This section allows you to define the fields in which the customer search will be carried out. By default, customer searches validate fields; “Last name, surname, company and user ID” to display a result.

You can select whether you want to use a custom search or not.

- If you select "no," you can then select two additional fields to add to the default fields during your customer searches.
    - For example, if in the customer record you have the employee number, you can select this field and perform a customer search by employee number.
- If you select "yes," you must choose a private or public search template created on the client target.

You also have the option to select two fields that will be displayed in a client's proposal window. The fields searched for in the previous option must be reentered here if you want to see them in the search result.

The last option allows you to choose the maximum number of customers displayed during a search.

Ticket Section

This section allows you to apply preferences that apply to your tickets.

The "Origin" option allows you to choose the default original type that will be applied when you create a ticket manually, here are the choices available:

- People
- Phone
- Email
- Other
- Set As No Default

The "Behavior when saving" option allows you to choose between "Save" a ticket or "Save and Close" the ticket. This allows you to automatically close the ticket upon saving without having to click on the tab to close it.

The "Ticket Assignment Notification," option allows you to choose the behavior of the system when an assignment is sent "To my resource" (when a ticket is assigned to you) and "to one of my groups" (when a ticket is assigned to a group with which you are associated).

The following behavioral choices are available:

- None: No action is taken
- Email: send an email
- Notification: Creates a notification
- Email and Notification (default): Send an email and create a notification

The option "When selecting a client" allows you to set behaviors on the ticket grid:

- Automatically filter the grid: If this option is set to "yes," the ticket grid filters its contents according to the criteria you type in the quick search field.
- Filter grid by statuses: This option allows you to choose when you access the ticket grid, whether you want it to display only "open," "closed," "assigned to me," "Assigned to my groups" or a several statuses.
- Filter the grid by: This option allows you to determine the default sort order when you access the ticket grid by either "Client" or "Enterprise."

The "Sections of the form" options allow you to determine which sections of a ticket should be open by default and their order in which they are displayed:

- To designate the order of the sections, you must use the arrows on the section name to move it up or down one position.
- To expand the contents of a section by default, you must press the name of the section to display the words "Expanded section."

CIs Section

This section allows you to add additional fields in which Configuration Items (CIs) searches will be performed.

You can also select two fields that will be displayed in the proposal window of a CI. The fields searched for in the previous option must be reentered here if you want to see them in the search result.

The "Number of CIs displayed for search" option allows you to choose the maximum number of CIs results to display during a search.

The “Sections of the form” option allows you to determine which sections of a CI form should be open by default and their display order:

- To designate the order of the sections, you must use the arrows on the section name to move it up or down one position.
- To expand the contents of a section by default, you must press the name of the section to display the words “Expanded section.”

1.4.6. My Subscriptions

This menu allows you to view all Knowledge Base articles to which you have subscribed using the Subscribe button.

Subscribing to a knowledge base article allows you to be notified if there is a change to the Knowledge Base. You can remove your subscription at any time.

1.4.7. Changing the display language

This option helps you change the display language between English and French.

1.4.8. Accessing the portal

This option lets you switch between the application interface and the portal interface.

1.4.9. Logging out

This option logs you out of your session on the C2 application. A logged-in session counts towards your number of concurrent users. The system logs out inactive users after a prolonged period of inactivity.

> *Note: You can manually log out a resource using the resource management menu.*

1.5. Searching

The C2 application allows you to perform three types of searches:

1. Search menu
2. Quick search
3. Contextual search

This section contains the details for each type.

1.5.1. Search menu

The search menu opens in a new tab, in which you can search by target. The available targets are tickets, CIs, clients, and enterprises.

Once you select a target, you can apply search parameters and conditions via logical operators.

You can also run a search using a search template by selecting one of your available search templates.

After running the search, the results will be shown in the search results section. You can also perform the following actions afterwards:

- Print the results
- Modify the grid display
- Export the list into a CSV
- Save your search as a search template.

> *Note: For more details on using conditions or creating a search template, please refer to section 5.4 Managing your search templates.*

1.5.1.1. Batch actions

Caution: This feature should be limited to certain users such as administrators or super users. It's a very powerful feature. All actions performed by this function are irreversible.

This function allows you to apply an action or several actions on all the elements resulting from your search.

> *Note: For more details on the actions you can run, please refer to section 5.6 Managing your action templates.*

1.5.2. Quick search

Quick search is available for resources in the menu bar, identified with a magnifying glass icon. It lets you search through your existing tickets.

1.5.3. Contextual search

Most menus in the C2 application have a contextual search field that lets you search through your menu items. The information on each contextual search is in their appropriate sections.

2. Managing users

C2 ITSM allows you to manage your users, their roles, their access rights, and the relationships between them. This section contains an explanation of each of the user concepts and the available configurations.

The user's management is based on four types of entities:

Entity	Description
Enterprises	Refers to groups of clients with something in common. For example, it can be a location, department, company, or organization.
Clients	Refers to any person authorized to open a ticket with a resource or through the portal. The same client can be associated with multiple enterprises.
Resources	Refers to any person authorized to access the C2 Application to process or view tickets and tasks. Resources are both a client and a resource. A resource can be associated with multiple enterprises.
Groups	Refers to a grouping of several resources sharing the same rights, permissions, and access.

Note: All users, whether clients or resources, must be associated with one or more enterprises.

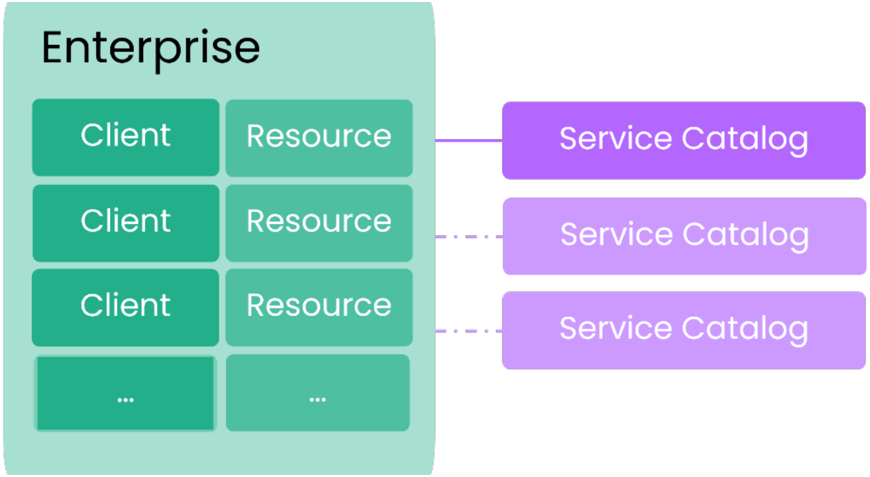
Here are the steps required for an initial configuration to manage your users:

1. Create an enterprise.
2. Create one or more clients associated it with this enterprise.

3. Create one or more resources associated with this enterprise.
4. Optional: Create one or more groups and link the desired resources to them

2.1. Managing your enterprises

In the context of C2 ITSM, an enterprise allows you to group together clients and resources that have something in common. For example, an enterprise can represent a location, a department, or an organization. You can also associate one or more service catalogs with an enterprise to determine which requests are available to the clients and resources associated with it.



To manage your enterprises in C2, access the management menu, then select enterprises from the "users" section. The enterprises tab opens and display a grid of all your enterprises.

Each enterprise has an enterprise form which contains its information.

Enterprise form

Here are the **default** field sections in the form:

Field section	Description
General information	Contain information to identify this enterprise.
Address	Contain information about the address linked to this enterprise.
Additional information	Contains information from Custom **fields**. *Note: For more details on custom fields, please refer to section 4. Managing Custom Fields.*
Client notes	Contains all the notes associated with this enterprise's clients.
Catalogs	Contains the different catalogs linked with the enterprise.
Manager	Contains the different managers linked with the enterprise.
Associated CIs	Contains CIs linked to this enterprise.
Bank of hours	Contains the bank of hours linked with the enterprise.
Associated clients	Contains a list of clients linked to this enterprise.
Associated tickets	Contains a list of open and closed tickets linked to this enterprise.

Portal customization	Contains the settings to customize the portal's appearance.
Messaging	Contains the domain for creating new clients linked with the enterprise.
Activities	Contains a history of changes made to the enterprise.

2.1.1. Viewing your enterprises

The Management > Users > Enterprises menu displays the grid containing the complete list of your enterprises.

To display the content of a specific enterprise, you must select the associated number or double-click on the item you wish to view. The form opens in a new tab.

To facilitate navigation, you can search for your items with the contextual search using the "Search by name" field. This lets you search by both number and name.

To view the inactive items, check the Deactivated items option.

Modifying the grid display

You can modify the column display to add or remove items from the grid or use grid templates.

To modify the display grid, you must select the "Edit Columns" button which make an arrow icon appear on the column header. By selecting the arrow icon, you can apply an ascending or descending sort and add or remove columns by ticking the box next to the desired ones from the available list.

To use a grid template, you must select the "Grids (templates)" button and select the desired template. This menu also allows you to reset the grid to its default display by selecting Return to initial configuration of the grid.

> *Note: To manage the available grid templates, these must be preconfigured via the management menus. For more information, refer to section 5.5 Managing your grid templates.*

Filtering your enterprises

You can apply filters on the grid to obtain different display results.

To apply a filter, you must select the desired one from the filter section.

To remove an active filter, you must either select another filter or the **None** filter.

> *Note: To manage the available filters, these must be preconfigured via the management menus. For more information, refer to section 5.3 Managing your filter templates.*

2.1.2. Creating an enterprise

To create an enterprise, you need to follow the steps below:

1. Select the **Create** button.
2. Fill in the required fields in each section.
3. **Optional:** Fill in the optional fields.
4. Save the form.

Here are the details of the **default** fields in each of the **enterprise** form sections:

> *Note: You can add custom fields to an enterprise record from the "Forms" section of the "Management" menu. For more information, refer to section 4.6 Managing your forms.*

Section: General information

Refer to the following list for the details of each field and its available options:

Field	Definition
Active	This field is required. You can define the status of this enterprise as active (Yes) or inactive (No) in **C2**. *Note: It is not possible to **delete** an enterprise. However, you can deactivate them by choosing "No" in this field.*

Name	This field is required. This field lets you write the enterprise's name. *Note: We recommend assigning a unique name to each enterprise, because you can import enterprises, and the enterprise name is the primary key. This field is also used in searches and reports.*
Unavailability Reason	This field lets you add an unavailability warning message when selecting an enterprise and then apply a restriction on ticket creation for this enterprise's clients. When receiving an email from a client in enterprise that has restrictions, no ticket is created, and no notification is sent back to the client. However, if an enterprise is unavailable and unrestricted, resources can override the restriction and continue creating a new ticket. *Note: You must first create a list item for the unavailability reasons list to add an unavailability reason to an enterprise. For more information, please refer to section 4.2 Managing your list items.*
Parent	This field lets you select a **Parent** enterprise to link the current enterprise to as a sub-enterprise or **Child** enterprise.

Address

This section is where you enter the enterprise's address information that includes the following:

- Address
- City
- Postal code
- Country
- State or province
- Phone

> *Note: The enterprise's address can be reused when creating a client linked to it.*

Additional information

This field section can be edited from the custom fields management menu.

> *Note: To add custom fields to an enterprise's form, you must access the menu: Management > Forms > Enterprise form.*

Assigning catalogs to the enterprise

In this section, you can assign one or more catalogs to the enterprise. A catalog is used to filter the requests available to clients linked to this enterprise (from the portal or if a resource user manually creates a ticket for a client).

Caution: if you do not associate at least one catalog to the enterprise, clients associated to this enterprise can access all existing categories, services and requests.

> *Note: Only public requests are visible on the portal.*

Assigning managers to the enterprise

Assigning a manager to an enterprise allows them to see all tickets created by all the enterprise's clients through the portal. However, the manager must be a client linked to the enterprise.

> *Note: Only tickets with the portal visibility option are visible on the portal.*

Customizing the enterprise's portal

In this section, you can customize the portal's visuals for this enterprise. For example, you can insert your logo and change the color of the text and top banner. Clients then see your custom colors. You can also define one or more CSS styles to make visual changes to the portal.

The customization options are:

- Logo
- Header color
- Buttons color
- Home Banner
- CSS Style

> *Note: For the colors to appear on the portal, a logo is required. Without a custom logo, colors will not be considered.*

2.1.3. Modifying an enterprise

To view or modify an existing **enterprise**, you must select the number or double-click on the **enterprise** you wish to access. The **enterprise form** opens in a new tab.

You now have access to edit all the fields available when creating the enterprise as well as new sections:

- Client notes
- Associated CIs

Client notes

The **Client notes** section lets you access the notes of all clients linked to the enterprise in read-only mode.

Indicators show you if you have access to modify this note and you can see its **read or unread** status.

These are the information included in the note:

- Client's name
- Note number
- Title
- Created by
- Last modified
- The content of the note (the note must be selected to see its content)

> *Note: If you are the creator of the note or a member of the administrator group, you can edit the content of the note by clicking on its number. This opens the editing interface for this note.*

Associated CIs

The Associated CIs section allows you to view the Configuration Items (CIs) from the CMDB that are associated with this enterprise.

> *Note: This section only allows you to view the information, to add a CI to an enterprise, for more details, please refer to section: 7.5 Managing your configuration items (CIs).*

Banked Hours

The Banked Hours section allows you to view, create or edit the Banked Hours associated to this enterprise.

> *Note: For more details on how to manage your Banked Hours, please refer to the section: 2.5 Managing your banked hours.*

Related Clients

The **Related clients** section shows all the clients linked to the enterprise. To open a client's file, you must click on the number on the right.

Related Tickets

The **Related tickets** section shows all tickets linked to the enterprise, whether open or closed. To open a ticket, you need to click on its number.

Messaging

The Messaging section allows you to register email domains so that the system automatically creates a new client in C2 when an email is received from an email address belonging to the same domain and that is not already associated with a client.

- For example: If you configure the domain @domain.com for an enterprise. When an email from the address Client_X@domaine.com is received in C2, the system validates if a client already has this email address. If no client has this email address, a new client will be created automatically and associated to the enterprise.

> *Note: If several enterprises share the same domains, the client will be associated to each of these enterprises.*

Activities

The **Activities** section lets you follow the changes made to the enterprise form. Actions are identified by the date and time, which user made the change and the type of change. By clicking on the activity, you can see the details of the change(s).

2.1.4. Managing the hierarchy of your enterprises

You can manage the hierarchy between your enterprises by managing the **Parent-Child** relation between them. To associate an enterprise with another **parent** enterprise, you have two options:

- You can edit the **child** enterprise and enter the name of the parent enterprise in the **Parent** field.
- From the side navigation pane, select the desired enterprise then **drag and drop** it into the target enterprise, which becomes the **parent.**

> *Note: It is possible to create a child enterprise by selecting an enterprise and*

dragging and dropping it onto the desired parent enterprise.

2.1.5. Exporting the list of your enterprises

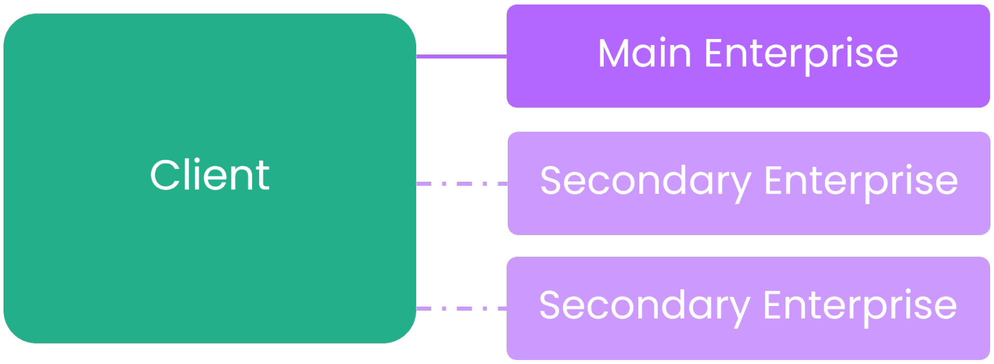
You can export the list of your enterprises in CSV format, to do this you must press the "Export" button and select one of the two export options available to you:

1. **Report format:** it exports your grid as is and is formatted according to the set language.
2. **Import format:** it exports under the import template used by C2. This allows you to make changes in batches and import them later through the import menu.

Note: For optimal exports, you must select the same export format as the language used in your Microsoft Excel software. To modify the export format, you must go to the menu: Profile > My Options > My Preferences > General Parameters.

2.2. Managing your clients

In **C2**, a **client** represents any person authorized to open a ticket with a **resource** or through the **portal**. You must associate each client to a main enterprise, but you can also associate it to secondary enterprises. To manage your clients, you must select the "Clients" menu from the menu bar.



A client may also have to act as a manager, approver, or administrator.

- An **administrator** is a **client** with security access that allows them to access the **management menu** and configure all the elements associated with C2.
- An **approver** is a **client** who must approve a **task** or an **approval** that can be done by email either through the **portal** or through the **app**.

Note: All clients can be an approver. This aspect is defined by the processes in your

> *service catalog.*

- A **manager** is a **client** that can view **all tickets** for all of their enterprise's clients through the **portal**.

> *Note: To act as a manager, a client must be part of the enterprise and must be added in the Managers field of the enterprise management form, for more details please refer to the section: 2.1.2 Creating an enterprise.*

Client Form

Each **client** has a **client form** in which you can find their information. To view or modify an existing **client**, you must double-click on the **client** you want to view or select their client number. The **client form** opens in a new tab.

Here are the **default** field sections of the **client form**:

Field section	Description
General information	Groups together information to identify this client.
Associated enterprises	Group together the enterprises associated to the client.
Phones	Contains information for communication by phone.
Address	Contains the client's address.
Additional Information	Contains information from **custom fields**.
Notes	Contains **notes** visible only to **resources**.
Associated CIs	Contains **CIs** linked to this client.
Activities	Contains the history of changes made to this client.

2.2.1. Viewing your clients

The **Clients** menu from the menu bar lets you display the **grid** containing the complete list of your clients.

To display the content of a specific **client**, you must select the associated number or double-click on the item you wish to view. The form opens in a new tab.

To facilitate navigation, you can search for your items with the contextual search using the "**Search by name**" field.

To view the inactive items, check the **Deactivated items** option.

> *Note: Resources are displayed in the Clients menu and are identified by the resource icon in the Type column. For more information, refer to section* *2.3 Managing your resources.*

Modifying the grid display

You can modify the column display to add or remove items from the grid or use grid templates.

To modify the display grid, you must select the **Modify columns** button. An arrow button appears on the columns enabling you to add or remove columns of elements.

To use a grid template, you must select the **Grid Templates** button and select the desired template. This menu also allows you to reset the grid to its default display by selecting **Return to initial configuration of the grid.**

> *Note: To manage the available grid templates, these must be preconfigured via the management menus. For more information, refer to section* *5.5 Managing your grid templates.*

Filtering your clients

You can apply filters on the grid to obtain different display results.

To apply a filter, you must select the desired one from the filter section.

To remove an active filter, you must either select another filter or the None filter.

> *Note: To manage the available filters, these must be preconfigured via the management menus. For more information, refer to section 5.3 Managing your filter templates.*

2.2.2. Creating a new client

To create a new client, you must perform the following steps:

1. Select the Create button
2. Fill in the required fields in each section
3. Optional: Fill in the optional fields
4. Save the form

Here are the details of the default fields for each of the client form sections:

> *Note: It is possible to add custom fields to the client form, from the Custom fields and Forms management menus. Refer to section 4. Managing Custom Fields for more information.*

General information

Field	Description
Active	This field is required. You can define the status of this client as active (Yes) or inactive (No) in C2. *Note: It is not possible to delete a client. However, you can deactivate them by choosing "No" in this field.*
Gender	This field is for information purposes.
Language	This field lets you set the application's default language when the client logs into the portal. It is also used for the default language when sending an email.

First name	This field is **required**. In this field, you enter the client's first name.
Name	This field is **required**. In this field, you enter the client's last name.
Email	In this field, you enter the client's email. Several clients can use the same email address. *Note: If your authentication method is through the database, the client's email address becomes especially important, but not required, because an email will be automatically sent to the client after the backup. They can then create a password which will be encrypted and saved in the database.*
Portal access	This field is required. It lets you authorize access to the **portal** for this client. When access is active, a **username** and password are required.
Username	This field becomes **required** if portal access is active. You can enter the username required for this client to log in to **C2**. This field is restricted by default, because it is linked to the status of the Portal access field, which must be active to remove the restriction. Even if the username is not required for a client without access to the portal, it is strongly recommended for all to have one, because it is the primary key for importing clients. *Recommendation: If you use the Windows authentication method (LDAP, SSO), insert your domain name in front of the user code.*

Role	This field lets you assign a **role** to the client. It is synchronized to the tickets and has an impact on the priority matrix. For example, you can set the **VIP** role, which escalates ticket priority up two levels. *Note: Roles are defined in list items, and modification of the priority matrix is done through the Priority feature.*
Customized catalog	Links a service catalog directly to a client. This has priority over the service catalogs linked to the client's enterprise.

Associated enterprises

This field lets you link this **client** to one or more **enterprises**. When a client is linked to multiple enterprises, the client has the option to select the targeted enterprise when creating a new ticket in the **portal**.

Resource-type users who manually create a ticket must also choose the targeted enterprise from those linked to the client.

When manually creating a client, the enterprise address is automatically copied into the client file. If the client already has an address in their file when adding the enterprise, a message appears and ask the resource whether they want the enterprise's address.

You can also create a new enterprise by pressing the **Add** button. An enterprise creation tab opens, and let you fill in the appropriate fields.

> *Note: For more details, please refer to section* *2.1 Managing your enterprises.*

Phones

This section lets you enter the **home**, **mobile phone** and **work** phone numbers assigned to this user.

Address

This section lets you enter enterprise address information, which includes the following:

- Address
- City
- Postal code
- Country
- State or province

> *Note: The enterprise's address can be reused when creating a client linked to it.*

Additional information

This section is editable from the custom fields manager.

> *Note: It is possible to add custom fields to a resource record from the menu Management > Custom Fields > Forms > Client Form.*

2.2.3. Modifying a client

To modify an existing client, you must select the associated number or double-click on the desired item. The form opens in a new tab.

You can access the same available fields as when you are creating a new client. See section 2.2.2 Creating a new client for more details.

Here are the new fields and functions available when viewing / modifying a client:

- Convert a client into a resource
- View and add notes
- View associated CIs
- View activity history
- Convert a client into a resource

Notes

You can add notes to a client's form. These are then accessible to the **resources** in the **Notes** section, both in the **client form** and in the client's **enterprise form**. The client does not see these notes.

You can also search within the notes. The targets are **the title** and **the content** of the note. You can also filter the notes to show only unread notes by pressing the "Unread" button.

Associated CIs

This section allows you to view the configuration items (CI) that are associated with this client.

> *Note: This section only allows you to view the information. To add a configuration item (CI) to a client, please refer to the section: 7.5 Managing your configuration items (CIs).*

Activities

You can track changes made to a client's form in this section. Actions are identified by the date and time, which user made the change as well as the type of change. By clicking on the activity, you can see the details of the change(s).

2.2.4. Converting a client into a resource

To convert a client into a resource, you must select a client and click on the "**Convert To Resource**" button. The system then automatically converts the client into a resource. To access the resource settings, you must access the resource manager.

Once the conversion is complete, the conversion button is no longer available, and a green checkmark indicates the end of the operation. The client's record becomes read-only.

> *Note: If you modify the information in the form, you must save your modifications before performing a conversion otherwise they will not be taken into account.*

2.2.5. Resetting a password

C2 users can reset their password themselves if they use the database authentication method.

To reset their password, users must select "Forgot password?" on the start screen. This action sends them an email with a link prompting them to change the password.

You can change a client's password manually. Here are the steps to manually assign a password:

1. Open client form.
2. Select the "Assign Password" button.
3. Write a password in the New Password field.
4. Save the client form.

2.2.6. Exporting the list of your clients

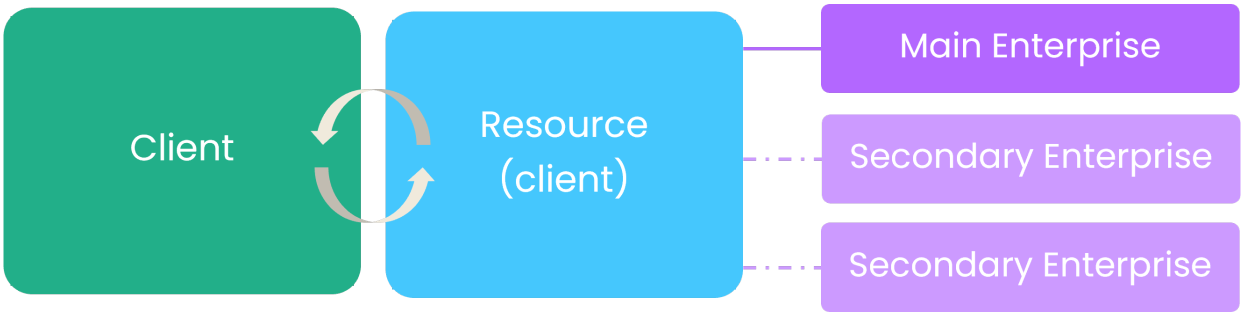
You can export the list of your clients in CSV format, to do this you must press the "Export" button and select one of the two export options available to you:

5. Report format: it exports your grid as is and is formatted according to the set language.
6. Import format: it exports under the import template used by C2. This allows you to make changes in batches and import them later through the import menu.

> *Note: For optimal exports, you must select the same export format as the language used in your Microsoft Excel software. To modify the export format, you must go to the menu: Profile > My Options > My Preferences > General Parameters.*

2.3. Managing your resources

In C2, the concept of resource refers to any person authorized to access the C2 application to process or view tickets and tasks. Resources are both a client and a resource. A client created from the client menu can be converted into a resource and vice versa.



To view all the details related to a resource, simply select it. To create a resource, you must press the Create button.

> *Note: It is possible to add custom fields to the resource record. You must add fields in the client form from the Custom Fields and Forms > Client Form management menu.*

2.3.1. Viewing your resources

The Management > Users > Resources menu shows you the complete list of your resources. To view a specific resource's content, you must select the item you wish to view.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and name.

You can also narrow your search by displaying only the resources of a group by selecting the desired group from the Search by group drop-down list.

To view the inactive items, check the Deactivated items option.

2.3.2. Creating a resource

To create a new resource, select the "Create" button and fill in the relevant field details.

Here are the field details available to create a resource:

General information

You can fill in the resource's basic information. If you select a language, that language is used by default when logging in. The resource can then modify the language of the application in their preferences.

IMPORTANT: AN EMAIL AND USERNAME ARE REQUIRED TO CREATE A RESOURCE.

Field	Definition
Profile photo	Lets you upload a photo from your computer.
Active	This field is required. You can define the status of this resource as active (Yes) or inactive (No) in C2.
Language	Lets you set this resource default language for the application. The language selected will also be used as the default language when sending emails.
Username	This alphanumerical field is required.
First Name	This field is required. In this field, you enter the client's first name.
Last Name	This field is required. In this field, you enter the client's last name.
Email	In this field, you enter the client's email.
Role	You can determine a role for the resource. This field is synchronized to tickets and has an impact on the priority matrix. For example, you can set the VIP role, which escalates ticket priority up two levels.

Customized catalog	Links a service catalog directly to a resource. When a resource has a custom service catalog and creates a ticket via the portal or acts as a client in a ticket, that catalog will be used instead of the one associated to the enterprise.
Status	This field is required. The resource also has an availability status which can be defined in the resource record, as well as by the personal options bubble. *Note: The availability status may make it impossible to assign tickets to this resource, but the resource can change its status at any time from its profile menu.*

Phones

This section lets you enter the **home**, **cell** and **work** phone numbers assigned to this user.

Address

The Address section lets you enter information related to the address of the resource. The available fields are **Address**, **City**, **Postal Code**, **Country** and **State or Province**.

> *Note: When creating a resource, if the fields in the Address section are empty, the address assigned is the same as that of the enterprise associated with this resource.*

Groups

By linking one or more groups with the resource, you can manage its application accesses (menus, function, access to tickets and tasks, etc.).

Associated enterprises

Lets you link one or more enterprises to the resource. A resource linked to multiple enterprises can select an enterprise when creating a new portal ticket. Resource-type users who manually create a ticket for a client can also select among the client’s enterprises.

Messaging Accounts

The application allows integration with one or more inboxes to receive emails, create tickets, but also to send emails using these tickets. By linking them to resources, you can determine the "From" address in emails rather than seeing the personal email address of the resource.

To add a messaging account to the resource, you must use the autocomplete field and select an available email.

For example, a client who receives an email sent from a ticket sees that the sender is "support" rather than the resource. This lets the client reply to the email. Their message (reply) is then saved in the correct ticket instead of being sent to the resource's personal inbox. If more than one email account is assigned, the resource can select one of these accounts when sending an email.

Timesheets

You can give the resource management rights on timesheets (timer). You can check "Can manage all groups" or select certain groups. By selecting a group from the autocomplete field, you can decide whether they should have read-only access to the group's resource timesheets. When viewing timesheets, the resource who can access several groups or resources can then view and modify resources' time entries.

Additional information

This section can be edited from the custom fields manager.

> *Note: It is possible to add custom fields to a resource record from the menu Management > Custom Fields > Forms > Client Form.*

2.3.3. Modifying a resource

To edit an existing resource, simply select the desired item.

You can access the same available fields as when you are creating a new resource. See section 2.3.2 Creating a resource for more details.

Activities

You can track changes made to a resource's form in this section. Actions are identified by "the date and time, which user made the change as well as the type of change." By clicking on the activity, you can see the details of the change(s).

2.3.4. Close session

You can end the session of a resource by selecting the resource and press on the Close Session button. Through this function, you can control your number of concurrent users.

2.3.5. Resetting a password

C2 users can reset their password themselves if they use the database authentication method.

To reset their password, the user must select "Forgot password?" on the start screen. This action sends them an email with a link prompting them to change the password.

You can force a password reset email to be sent to a resource manually, here are the steps to follow:

1. Select the desired Resource.
2. Confirm that the email field contains the right information.
3. Select Reset password.
4. A confirmation message will be displayed if the action is successful.

2.3.6. Converting a resource into a client

To convert a resource into a client, you must select a resource and click on the "Convert into client" button. The system automatically converts the resource back into a client and removes it from the resource list.

2.4. Managing your groups

In C2, the concept of groups refers to a set of people sharing the same rights, permissions, and access.

Groups are defined under two broad categories:

1. Security group: Basic in-app security determines who can access what.
2. Families: Grouping of resources having something in common, such as a team in a department.

By default, there are two existing groups:

- Admin: This group has all accesses and rights in the application and can't be modified. The members of this group see everything—it is not possible to hide information from them. We recommend assigning a restricted number of resources to this group (e.g., 1 to 2).
- Resource: This group has most rights but can be modified if needed.

> *Note: You can recognize the administrator group by the presence of a checkmark in the admin column.*

2.4.1. Viewing your groups

The Management > Users > Groups menu lets you view the complete list of your groups. To display a specific group's content, you must select the item you wish to view.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and name.

To view the inactive items, check the **Deactivated items** option.

2.4.2. Creating a group

To create a new group, select **create** and fill in the associated field details.

Here are the field details available to create a group:

General information

Refer to the following list for the details of each field and its available options:

Field	Description
Active	This field is **required**. You can define the status of this group as active (Yes) or inactive (No) in C2.
Email Address	This field represents the group email address (distribution list) to send emails to members of the security group. This address will be used if the Notification section is configured "according to group email."
English and French name	This field is **required**. You can enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Catalog Filter	Allows you to associate a filtered catalog to the group, this prevents the group's resources from creating tickets for requests that are not part of this catalog, even if the client (requester) has a catalog that normally allows him to create these requests. For example, a client contacts their IT department and wants to open a ticket for a new hire. In this situation, the client would be able to create a request from his portal, because the request is part of his service catalog, however, the resource responding to him is part of the IT department, it cannot create the ticket for the client because the catalog filter in its group prevents it.
Notification	This field sets whether notification emails that are sent to this group use the group email address or whether they are sent to each member of the group.
Auto Start Timer	Allows you to select whether the timer trigger automatically. You can also determine if it is always active or only when assigned.
English and French Email Signature	The signature is used for all group members where the group is set as the main group. To use this signature, the email template must contain the [SIGNATURE/] tag. If the group does not have a signature, but a signature is set in the advanced settings, then this signature will be used.

Members

You can add members to a group in this section. To find the resource's name, start typing the person's first or last name to make it appear. Simply click on their name to add it.

Queues

You can link queues to this group in this section. Queues are a data structure for grouping tickets according to diverse needs. The queues visible on the resources' application are shown based on the assigned groups.

Messaging accounts

In this section, you can link one or more email accounts as the source for sending emails from this group.

> *Note: You must configure at least one email account in your automation to link an email account to the group. For more information, please refer to section 6.3 Managing your mailboxes.*

Email Templates

This section lists the email templates that the group is allowed to use.

Group Security

This section allows you to select whether you want members of this group to be able to see all groups from the side pane of the tickets menu or whether you prefer to limit access to specific groups. This also allows members of this group to see the resources associated with other groups and assign tickets or tasks to them.

To allow all groups to view, you must check the “Can see all groups” option.

If you want to allow the view to specific groups, you must uncheck the “Can see all groups” option, type the name of the desired groups and then select them from the autocomplete field. Once the groups are selected, you can determine which groups should be displayed in the side pane by selecting the “Widget” option on the appropriate groups.

> *Note: To assign a ticket to a group, the group must be visible. To assign a ticket to a resource, the resource’s group must be visible.*

Application Security

This section lets you give permissions to the group’s resources. The permissions can be to create, modify, view only, etc., depending on the actions allowed to the group’s resources.

Tickets security

This section allows you to manage security rights on the actions that the group's resources can perform on tickets.

For example: By removing the checkmark from the "Resolve if pending workflow" option, resources in this group can't change the status of a ticket from "In progress" to "Closed" without all workflow tasks associated with the ticket being closed.

Ticket Status Security

In this section, you can manage the status dots to display based on the request type. You can have fewer dots if needed by clicking on the ones you don't want to use (the dot turns dark gray in the configuration and be light gray in ticket management). These dots are at the top of a ticket and show its progress.

Visibility sections of a ticket

In this section, you can choose to show or hide the sections in a ticket that a group can see by checking or unchecking the sections.

2.4.3. Creating a group from a copy

You can create a copy of an existing group to use its configurations for creating a new group.

To do so, select the desired group and click on Copy; a copy will be generated containing all the configurations in the field details, with the exception of the English name and French name fields.

2.4.4. Changing group display preferences

The "Edit Preferences" button opens a new tab so that you can change the default display settings for the selected group. In this menu, you can change the layout of the ticket sections, set additional search fields, apply a filter to them, move sections up and down in the form, and add additional fields for searching CIs.

The Edit Preferences button allows you to change the default display settings for this group. The options available here are the same as those found in the "My Options >

Other Preferences" menu of the user profile except for the Ticket Filter option.

The Ticket Filter drop-down field allows you to select a ticket filter from your list of filter templates to be applied by default when the member of this group opens their ticket tab.

From this menu, you can change the layout of the ticket sections, set additional fields for searching, apply a filter to them, move sections up or down in the form, and add additional fields for CI searching.

> *Note: Resources always have the ability to change their display preferences from the "My Options" menu in their profile.*

2.4.5. Modifying a group

To edit an existing **group**, simply select the desired item.

You can access the same available fields as when you are creating a new **group**. See section 2.4.2 Creating a group for more details.

2.5. Managing your banked hours

Allows you to manage time banks by enterprise and by CI. You can add billable time manually without changing the resource's time.

> *Note: You can also automatically assign a time bank to a ticket if only one is available and the "Auto-assign time bank" option in the application settings is set to YES.*

2.5.1. Viewing your banked hours

The **Management > Users > Banked Hours** menu displays your items' entire grid.

To display the contents of a **Banked Hours**, you must **select** the desired item.

To facilitate navigation, you can search your existing items using the **Search by name** field, which enables you to search by both number and name. You can also **refine** your search results by using the **Enterprise** and **CI** fields in the search bar.

To view the inactive items, check the **Deactivated items** option.

2.5.2. Creating a new banked hours

To create a new Banked Hours, select create and fill in the associated field details.

Here are the field details available to create this template:

General information

Refer to the following list for the details of each field and its available options:

Field	Description
Active	This field is required. You can define the status of this Banked Hours as active (Yes) or inactive (No) in C2.
Reference No.	With this field, you can assign a reference number to the bank of hours. (This field is alphanumeric.)
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
Enterprise	This field is required. It lets you link an enterprise with a bank of hours.

CI	This field is **required**. Lets you link a CI with a bank of hours.
Start date	This field is for adding a start date to the bank of hours
Expiration date	This field is for adding an expiry date to the bank of hours
Number of Hours Purchased	This field is for adding the number of purchased hours. This field will be calculated when hours are used so as to define the number of hours remaining.
Number of Hours Remaining	This field is **read-only** and matches the result for the number of purchased hours minus the number of used hours.
Hourly Rate	This numeric field allows you to enter the hourly rate for this hour bank and supports up to two decimal places.
Actual Worked Hours	This field is **read-only**. It calculates the actual time worked from all the timesheets associated with the bank of hours.
Billable Overtime	This field is **read-only**. It calculates the overtime worked from all the timesheets associated with the bank of hours.
Number of Hours Consumed	This field is **read-only**. It displays the result of the *Actual time worked + overtime to invoice* equation. It is used to define the number of hours remaining by deducting it from the number of purchased hours.

2.5.3. Modifying banked hours

To modify **banked hours**, simply select the desired item.

You can modify all the same available fields as when creating a new set of banked hours and access these added sections:

- Attachments
- Related tickets
- Related Timesheets

Here are the details for each of the new sections:

Attachments

You can attach files to the banked hours in this section. For example, it could be a service contract or any other information that should be attached to the bank of hours. To attach a file, you must press the Browse button and select the desired file from the file explorer window.

Related Tickets

This section allows you to view the history of open or closed tickets and tasks associated with the banked hours. You can access the tickets and tasks by pressing their numbers.

Related Timesheets

You can view a history of the time used from the banked hours with related information, including resources, start date, duration, overtime, and comments.

3. Managing your service catalogs

In C2, a **catalog** or **service catalog** is a database or structured document containing information on all services in operation and those available for deployment.

The service catalog is the only section in the service portfolio that is public to clients. It includes information on deliverables, prices, points of contact, and order and request processes. The structure of a **service catalog** is based on the **requests** that it contain.

In this section, you can manage all the items required to create and configure service catalogs based on your needs.

3.1. Defining a service catalog

Defining a service catalog is important for implementing the application.

A well-defined service catalog is based on clear processes that support the enterprise's business. It allows for sound management of services and client requests.

Creating a catalog is based on the following elements:

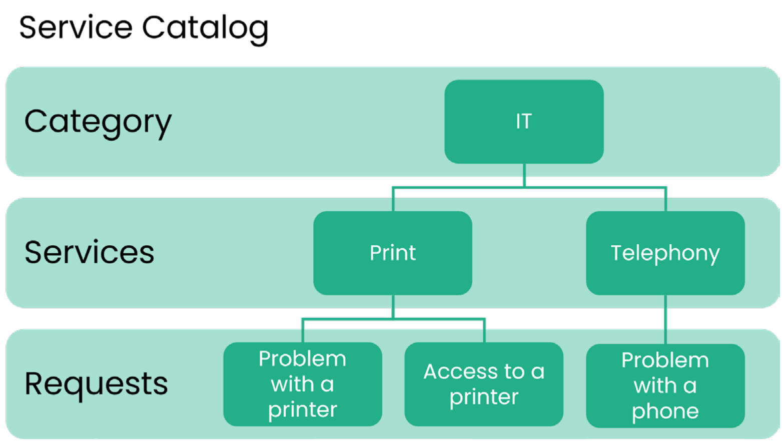
- Target users
- A category
- A process
- A form, if required

Here are some steps to help you define a catalog:

1. Work with your team members to identify the services that are supported or used by your customers (employees, external clients).
2. Regroup the services into distinct categories (e.g., Information Technology, Human Resources, etc.).
3. Then identify the requests you support in relation to the services provided. Each request represents a process and sometimes even a form to be filled out by your customers. You need to have this information to materialize it in the application.
4. Finally, you can create a service catalog and select the available elements.

Here is a simple example of a service catalog:

- This catalog contains the “IT” category, this category groups services such as a printing service and a telephony service.
- Each of the services groups the requests available to C2 clients.
- The printing service contains the requests: “Problem with a printer,” “Access to a printer.”



A service catalog includes the following elements: one or more categories > each category contains one or more services > each service contains one or more requests.

3.2. Managing your service catalog categories

In C2, a **category** is a group of objects that have a common element or that could be considered as being in the same family.

For example, when you name a category **Information Technology**, you can link objects from the same family for services such as printing, access and security, computer hardware, and office applications and software.

Categories let you link the **services** that your clients can use.

3.2.1. Viewing your categories

The **Categories (Catalog)** tab shows a complete list of your categories. To display the contents of a category, you must select the category you wish to view.

To facilitate navigation, you can search your existing categories using the **Search by Name** field, which enables you to search by both number and name.

To view the inactive templates, check **deactivated items**.

3.2.2. Creating a category

To create a new category, select **create** and fill in the associated field details.

Here are the field details available to create this category:

General information

Refer to the following list for the details of each field and its available options:

Field	Description
Icon	You must select an icon from the image bank provided by the system (an icon is required).
Active	This field is **required**. You can define the status of this category as active (Yes) or inactive (No) in **C2**.
Sequence #	This field is **required**. The sequence number must be numeric but does not have to be unique. If you leave the field empty, a sequential number will be automatically assigned to the category, but you can modify it if needed.
English and French name	This field is **required**. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French	This field lets you add a description to provide more details

description	about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Associated services

This section displays all the services associated with the category. To associate services, you must select the category in the service configuration menu.

Note: For more details regarding the services, please refer to section 3.3 Managing your services.

3.2.3. Modifying a category

To modify an existing **category**, select the desired **category** to see its details.

You can access the same available fields as when you are creating a new **category**.

Note: For more details, please refer to section 3.2.2 Creating a category.

3.3. Managing your services

In C2, a **service** is a group of **requests** that have a common element.

A **service** is considered a **CI** in the database, and it is possible to add additional attributes to it.

Here is an example of a service:

> Under the Information Technology category, **the printing service** groups together requests such as adding a printer and problems with a printer.

3.3.1. Viewing your services

The **Services (Catalog)** tab shows a complete list of your services. To display the content of an element, you must select the item you wish to view.

To facilitate navigation, you can search your existing items using the **Search by Name** field, which enables you to search by both number and name.

To view the inactive items, check the **Deactivated items** option.

3.3.2. Creating a service

To create a new service, select **create** and fill in the associated field details.

Here are the details of the fields available to create this service:

General information

Field	Description
Icon	You must select an icon from the image bank provided by the system (an icon is required).
Active	This field is **required**. You can define the status of this service as active (Yes) or inactive (No) in **C2**.
State	This field is **required**. Here you can set a state for the service (e.g., under evaluation, under construction, in use). You can customize the list of states as well as the detailed options from the "Management > List Items" menu. For more details, please refer to section 4.2 Managing your list items. **Important: as for the states, this one has specific features.** **Color:** If you associate a color with a state, it may visually impact the portal. Preventing ticket creation through the portal: you can prevent a client from creating a request for a service if the service is in a particular state.

Sequence #	The sequence number must be numeric but does not have to be unique. If you leave the field empty, a sequential number will be automatically assigned to the request, but you can modify it if needed.
Category	This field is required. This field allows you to choose the category to which you want to associate this service.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
Tags	It is possible to add tags to the services to make searching from the portal or the application easier. Adding tags to a service lets you quickly find all requests for that service when searching.

Additional information

This section is only visible when an attribute is added to a service. To add attributes to the service, you must go through the Categories (CMDB) menu.

> *Note: For more details on managing attributes, please refer to section 7.3 Managing your CMDB categories.*

Associated requests

This section shows all the requests associated with this service.

To link a request to a service, you must do it from the Management > Service catalog > Requests menu.

3.3.3. Creating a service from a copy

You can create a copy of an existing service to use existing configurations as a basis for creating a new group.

To do so, select the desired item and click on Copy; a copy will be generated containing all the configurations present in the field details, with the exception of the English name and French name fields.

When you create a service from a copy, not all requests associated with the original service will be copied.

3.3.4. Modifying a service

To modify an existing service, select the desired service to access the details.

You can access the same available fields as when you are creating a new service.

> *Note: For more details, please refer to section 3.3.2 Creating a service.*

3.3.5. Adding custom fields to services

You can add custom fields to enhance catalog services. The goal is to show important information under the services visible from the portal.

To add custom fields to your services, you must first access the "CMDB Configuration > Categories" management menu, select the "Service" category and press the "Add Section" button.

Here are some examples of attribute fields that can be linked to a service.

- Schedule
- A "Schedule" type field modify the work schedule of all service requests and affect the service level agreements (SLA).
- Service type
- Target clients
- Service level

- Cost
- Service owner
- Maintenance period

3.4. Managing your requests

In C2, **requests** are a formal demand from a user for a service to be provided. A request can be an incident, a service request, a change request, or a problem.

A **request** is the last level of the service catalog and can trigger a process. A request can also be a simple or complex dynamic form.

The application lets you create requests using custom fields and section templates.

3.4.1. Viewing your requests

The **Requests** tab displays the complete list of your requests. To view the content of a specific **request**, you must select the item you wish to view.

To facilitate navigation, you can search your existing items using the **Search by Name** field, which enables you to search by both number and name.

To view the inactive items, check the **Deactivated items** option.

3.4.2. Creating a request

To create a new request, select **create** and fill in the associated field details.

Here are the details of the fields available to create a request:

General information

Field	Description
Icon	You must select an icon from the image bank provided by the system (an icon is required).
Active	This field is **required.** You can define the status of this service as active (Yes) or inactive (No) in C2.

Sequence #	The sequence number must be numeric but does not have to be unique. If you leave the field empty, a sequential number will be automatically assigned to the request, but you can modify it if needed.
Type	There are five (5) types of requests in the application: • Incident • Service request • Problem • Change request • Project These types have different uses in the application. Among other things, they provide basic request templates, status filter requests, and can be used as targets for searches, filters, or processes. In application management, the Ticket type menu is also available with configurable parameters. For more information, please refer to section: 9.5 Managing ticket types.
Availability	There are two types of availability: Private availability lets you restrict the access to this request so that it can only be created internally. Only the resources can select this request when creating a new ticket for a client. Public availability lets you post requests to the portal and lets clients create a new ticket in self-service mode. *Note: In both cases, the request must be available in the service catalog and associated with the client or the client's enterprise.*
Queue	It is possible to link a default queue to a request. When a ticket is created, it is saved to this queue. If no queue is defined, the ticket will be saved in the queue defined in the advanced settings.

Service	This field is required. You must link the request to a service in the catalog. This link lets you filter the list of requests per service.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. Additionally, the description is visible to clients on the portal. *Note: If your C2 environment is monolingual, only the set language is displayed.*
Tags	This autocomplete field lets you add tags to make it easier to search in the application or the portal.

Associated workflow

The request's workflow supports the request's process. A workflow can include:

- Tasks
- Sub-requests
- Actions
- Conditions

A workflow run sequentially from start to finish. Each condition will be evaluated according to the sequence and status of the previous tasks. As soon as an element of the flow cannot be evaluated sequentially, or if it is a condition on the timeline for example, actions to be taken according to a date or when a field value changes, it must be evaluated in a process.

You can create a single-branch workflow of parallel tasks with the same step numbers, or sequentially with different step numbers.

Resources can also manually add new tasks or requests to the ticket. A process can also create new tasks in the workflow.

In an approval task, it is possible to decide whether **a rejection** stops the request workflow or if it continues. This then creates a workflow with several conditional branches.

For example, under an approval task, you could insert a condition to go on the **true** side if the manager approves it, or on the **false** side if they deny it, etc.

Additional information

You can add information sections and custom fields to the request using the **Add Section** button.

To link fields to the request, you must first create custom fields in the application. For more details on the custom field, please refer to section 4.4 Managing your custom fields.

For each of the fields in the section, you have access to the following settings:

Field	Description
Availability	When adding a section, you can set its availability. The section can be visible in the public portal or only visible to resources or private users.
English and French name	The French and English names serve as section headers in the request.
Section visible on condition	This option allows you to select a condition to make the section visible.
Row with "x" field	When a section is added, you can set the number of columns (between 1 and 4) to display on screen and insert custom fields.

3.4.2.1. Configuring field settings

By clicking on the edit button represented by a "pencil" icon, you can access to the following settings:

Field	Description
Select the custom field	This lets you choose a targeted custom field from the drop-down list or create a new custom field by clicking the Create New Custom Field button.
Read-only	Displays a value in the field without a user being able to modify it. Clicking this provides you with four options: • At creation only • If field has value • If other fields have been filled • Editable for group(s)
Required	This setting lets you specify a field as required for saving a ticket. You can also set a condition in which the field will be required if the condition is true. If the targeted field is a check box, the field becomes required if the box is checked.
Linked field	Links the field of the form to a source to synchronize a value from a source field. For example, if you target the client (requester) and a field in their record (e.g., phone number), when the client selected in the ticket, their phone number is automatically copied into the ticket field. This makes it possible to create several scenarios with different ticket sources. *Note: This feature requires manually selecting from the source. The linked field stays empty if the source is set by process, import or other automation.*
Do not copy	This lets you specify that this field should not be copied when copying the ticket. In certain cases, you should not copy certain values, which may be named or serve as a control to trigger processes.

Field number	Field numbers are used only for importing. If no tickets from this request are imported, field numbers are not necessary. However, if there is a possibility to import tickets from this request, the numbers must be unique. They do not need to be sequential (you can have 1, 2, 5, 10, 25 and 43), but they must be unique for you to import.
Validations	Used to create a business rule on the request field to restrict the entry of a specific value. For example, if it is a date-type field, you can force the user to enter a date greater than the date entered in another field of the form, etc. *Note: For more information, refer to section 4.5 Managing your field sections.*

Advanced configuration

Field	Description
Impact	This assigns a default impact and urgency to a request. These two values automatically set a priority for the ticket according to the matrix defined in Management > Advanced settings > Priorities. If the fields are left blanks, the impact and urgency need to be selected manually when creating or processing the request.
Urgency	This assigns a default impact and urgency to a request. These two values automatically set a priority for the ticket according to the matrix defined in Management > Advanced settings > Priorities.
Cost	Here, you can enter a cost and a price for a request, but these fields are used for information purposes only. Clients do not have access to this information.

Price	Here, you can enter a cost and a price for a request, but these fields are used for information purposes only. Clients do not have access to this information.
Response time	This field lets you set a default response time. This time is used to calculate a response date, which is calculated once the ticket is created to manage your service levels (SLA). You can enter a response time in minutes, hours, or days. The period is the same regardless of priority. *IMPORTANT: This section overrides the rules set in the Management > Advanced Settings > Priorities menu.*
Resolution time	This field lets you set a default resolution time. This time is used to calculate a resolution date, which is calculated once the ticket is created to manage your service levels (SLA). You can enter a resolution time in minutes, hours, or days. *IMPORTANT: This section overrides the rules set in the Management > Advanced Settings > Priorities menu.*
Service hours	This setting is used to decide whether the calculation of the response time and resolution time for this request must take into account the working hours determined in the Management > Advanced settings > Other settings > Working hours menu. You can also edit this service's information and choose based on the service schedule or, if the calculation is continuous, in 24/7 service mode.
Show the General Description section	When creating a request to reproduce a form, the summary and

	description fields may not be necessary. This option hides the section that includes these two fields. These are then invisible in the portal and the application for resources. *Note: As the summary is displayed on the ticket grid, you must ensure that a value is inserted in the summary, either by automatically generating the ticket summary, or by having an action configured to set the summary after the ticket is created.*
Is Draft Allowed	This setting lets clients save the ticket as a draft, so they can finish it before resources or business rules handle it. *IMPORTANT: No processes run on a draft ticket.*
Show the Attachments section on the portal	Shows or hides the attachments section in the portal. If you want to make it mandatory to add a file for this request, you must create a custom field to handle it, as the file attachments section of the portal does not allow for the mandatory addition of files.
Auto-generate ticket Summary	This setting copies the name of the request into the ticket's summary field, so you do not have to ask the client to enter one. You can set this rule per ticket type using the Management > Advanced settings > Ticket types menu.
Default Action on Portal (if Draft allowed)	If draft mode is allowed, this option allows you to set the default action for the save button on the portal, the choices are "Submit" or "Save as draft."
API triggered on ticket load	This field lets you select an API to run when the ticket is loaded.

API triggered before ticket is saved	This field lets you select an API to run before the ticket is saved.
Automatically assign banked hours	This setting automatically assigns a bank of hours when creating a ticket if only one banked hour is available.

Directive on Portal

This setting shows request instructions (e.g., explanation or form details) in the portal. These instructions are shown above the form when creating a new request.

This section provides space for English and French instructions.

Service levels

You can set customized response and resolution times per priority for a request. You must check the **Modify** option to edit the preset values.

Configurable fields:

- P1 to P5
- Response delay
- Resolution delay
- Service hours

IMPORTANT: THE CONFIGURATIONS YOU APPLY IN THIS SECTION OVERRIDE THE RULES ASSOCIATED WITH THE TIMES DEFINED IN THE “ADVANCED CONFIGURATIONS” SECTION OF THE APPLICATION AND IN THE “MANAGEMENT / ADVANCED SETTINGS / PRIORITIES” MENU.

Assigned to Resources

This assigns one or more default **resources** to the ticket. Once the request has been saved, **resources** automatically receive a notification of assignment by email.

> *WARNING: If you add resources directly to a request and the resource leaves their employment, it may be difficult to find all the configurations that were assigned to that resource. Instead, we recommend assigning your requests to groups.*

Assigned to Groups

This lets you assign one or more default groups to the request. Once the ticket has been saved, the resources linked to the group automatically receive a notification of assignment by email.

This section also lets you configure capacity management for the selected groups.

3.4.2.2. Configuring capacity management

The option "According to the number of tickets assigned" allows you to let the system automatically assign a resource from a group to a ticket.

The resource that is assigned must fulfill two prerequisites:

- The resource belongs to at least one of the specified groups.
- The resource has a status that can be assigned a ticket.

Then, the selected resource that will be assigned must meet three conditions:

1. The resource has never been assigned to the ticket.
2. The resource has the lowest number of open and assigned tickets/tasks.
3. The resource with the longest time since the last ticket assigned. (Applicable if several resources have the same lowest number of open and assigned tickets/tasks.)

Operation on loading a new ticket from a request; assigns a resource from the groups assigned in the request if no resource is already assigned.

Operation when saving a ticket or a process; assigns a resource from the Groups assigned in the ticket if no assigned resource is present in this ticket.

Associated Print Templates

This section allows you to associate specific print templates to the request.

You must uncheck the "Can use all print templates" option to access the print template selection field.

3.4.3. Creating a request from a copy

You can create a copy of an existing request to use the configurations that are already present as a basis to create your new item.

To do so, select the desired item and click on Copy; a copy will be generated containing all the configurations present in the field details, apart from the English name and French name fields.

3.4.4. Modifying a request

To modify an existing request, select it to access the associated details.

You can access the same available fields as when you are creating a new request apart from the "Type" field, which cannot be modified once the request is saved.

3.5. Managing service catalogs

The service catalog lets you filter its contents (categories, services, requests). Users can access every item if you do not create a service catalog.

3.5.1. Viewing your service catalogs

The Catalogs tab displays the entire grid of items. To view a specific catalog's content, you must select the item you wish to view.

To facilitate navigation, you can search your existing items using the Search by Name field, which enables you to search by both number and name.

To view the inactive items, check the Deactivated items option.

3.5.2. Creating a service catalog

To create a new catalog, select create and fill in the associated field details.

Here are the details of the fields available to create a service catalog:

General information

Field	Description
Icon	This field is required. In this field, you can select an icon from the image bank provided by the system.

Active	This field is required. Through this field, you can check whether this catalog is available to users.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. Additionally, the description is visible to clients on the portal. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Associated requests

This field lets you check or uncheck the desired requests that make up this service catalog. To access the available requests, these must first be created and linked to a service and a category.

Default request

This autocomplete field lets you define a default request to speed up the creation of a request type if it is used frequently.

3.5.3. Linking a service catalog for clients

You can link one or more catalogs to an enterprise. In this case, all the enterprise's clients have access to the specified catalogs.

You can also link a catalog to a client directly as a custom catalog; this catalog is given priority over the service catalogs linked to the client's enterprise.

To link your catalogs to an enterprise or a client, you must add it in the management menu of the desired item. For more information, refer to the following sections:

- For an enterprise: 2.1 Managing your enterprises
- For a client: 2.2 Managing your clients

3.5.4. Filtering a service catalog for a group

The filtered catalog prevents a group resource from creating tickets for requests that are not in their catalog, even if the requesting client has a catalog that allows them to make these requests.

For example, a client calls the IT department and wants to declare a new hire: the client can make the request from the portal or by contacting Human Resources directly, but the IT resource cannot create the ticket for the client.

For details on adding a filtered catalog to a group, please refer to section 2.4.2 Create a Group.

3.6. Managing your tasks

In C2, tasks represent an activity in a request process that requires a resource or a client to execute an action to fulfill the request.

A task has almost the same characteristics as a request. It is considered a form for resources or for clients. A task can be, for example, a required approval or a task to be completed by the client.

You can create tasks in the C2 application using custom fields and section templates so that users can complete actions associated with it.

3.6.1. Viewing your tasks

The "Tasks Templates" tab shows the complete list of your tasks. To view the content of a specific task, you must select the item you wish to view.

To facilitate navigation, you can search your existing items using the Search by Name field, which enables you to search by both number and name.

To view the inactive items, check the Deactivated items option.

3.6.2. Creating a task

To create a new task, select **create** and fill in the associated field details.

Here are the details of the fields available to create a request:

General information

Champ	Description
Template Type	This field is **required**. There are two (2) types of tasks in the application. “Task template” and “Approval template.” These types have different uses in the application. The “task template” is for a normal task. In other words, it is a basic template of a task that can be customized with sections and fields. It can be assigned to groups or users. These tasks can be part of one or more service catalog request workflows. The “Approval template” has a specific use. It is used to add one or more approval steps to the request workflows.
Email template	It is possible to link a default email template to the task template so that the system sends an “assignment notification” email to the users assigned to the task. *IMPORTANT: For tasks using the approval template, you must use this default email template: Ticket approval or a copy of this template to create a new one.* *This procedure preserves the system tags that the mechanism built into the system needs, which makes it possible for users to approve or decline the task via email.* *For more details, please refer to section 5.1 Managing your email templates.*
Active	Through this field, you can choose whether the request is active and available to users.

Sequence #	The sequence number must be numeric but does not have to be unique. If you leave the field empty, a sequential number will be automatically assigned, but you can modify it if needed.
Queue	It is possible to link a default queue to a task. When creating the task, it is saved in this queue. If no queue is defined, the task will be saved in the queue defined in the advanced settings.
English and French name	This field is **required**. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. Additionally, the description is visible to **clients** on the **portal**. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Additional information

You can add information sections and custom fields to the task using the **Add Section** button.

To link fields to the task, you must first create custom fields in the application. For more details on the custom field, please refer to section 4.4 Managing your custom fields.

For each of the fields in the section, you have access to settings.

Field	Description
English and French name	This field is **required**. The French and English names serve as section headers in the request.

Section visible on condition	This field lets you configure the conditions to make the section visible. For more details on configuring conditions, refer to section 5.3.4 Applying conditions.
Management of rows with field	When a section is added, you can set the number of columns displayed on screen from one to four and insert custom fields. Rows with fields can be added. The display order of rows and fields can be managed.

Associated workflow

A task's workflow is distinct. The purpose of a task's workflow is to be able to execute one or more actions as soon as the task is created and available.

For example, using an action in the workflow of a task approval template, you can define the approving authority by retrieving it from the client file or from a custom field in the request.

It is possible to create a single-branch or multi-branch workflow using conditions.

Advanced configuration

Here are the field details available for the advanced configuration section of this task:

Field	Description
Estimated Duration	This field is required. Here, you can enter an estimated length saved in the task. This length lets you manage the time spent on a task.
Cost and Price	These fields are required. Here, you can enter a cost and a price for a task, but these fields are used for information purposes only.
Response Time	Here, you can set a default response time. This time is used to calculate a response date that is calculated once the task is created

	to manage your service levels (SLA). You can enter a response time in minutes, hours, or days.
Resolution Time	Here, you can set a default resolution time. This time is used to calculate a resolution date that is calculated once the task is created to manage your service levels (SLA). You can enter a response time in minutes, hours, or days.
Service Hours	This setting is used to decide whether the calculation of the response time and resolution time for this task must take into account the working hours determined in the "Management > Advanced settings > Other settings > Working hours" menu. Or whether calculation is done non-stop, 24/7. For example, if the working hours are 8 a.m. to 5 p.m. and the task setting is "Service hours," the calculated response time for a task coming in at 6 p.m. is set to the next working day.
Include **Client Assignment**	By default, a task created with the "task template" type can only be assigned to resources. This option allows a "task template" task to be assigned to clients so that they can perform tasks other than only those with the type "Approval template." *Note: In C2 ITSM normally only administrators and resources require licenses to access the application, however, when a client opens a "Template Task" from the portal, a license from the application is reserved while the client completes the task. Once the task is closed, the license is released.*
Continue if refused	This setting is only for the "Approval template." If an approval task is added in a request workflow, the flow may be stopped depending on the approval status. When the approval status is "refused," this setting must be set to "yes" to be able to continue in the workflow (with a condition such as "Send a refusal email"). If the setting is set to "no," as soon as the task status is "refused," the

	flow stops there, and the rest of the flow will not be evaluated or executed.
Show general description section	When creating a task to reproduce a form, the "Summary" and "Description" system fields may not be necessary. This option hides the section that includes these two fields. These are then invisible in the application for users.

Assigned to Resources

This section allows you to assign one or more default resources to this task. Once the task is saved, the resources automatically receive an email notification that they have been assigned to the task. The email template defined in the "Email Template" field is used to send the email.

> *Note: This option is only available for tasks using the "Task template" type.*

Assigned to Clients

To have access to this section, you must select yes in the "Include assignment to clients" field of the advanced configuration section.

This section lets you assign one or more clients to the task.

Clients automatically receive a notification of assignment by email, as defined in the "Email model" option.

> *Note: This option is only available for tasks using the "Task template" type.*

Assigned to Groups

This section lets you assign one or more default groups to the request. Once the request has been saved, the "resource" users automatically receive a notification of assignment by email. The one defined in the "Email model" option.

Assigned to groups – Capacity management

The option "According to the number of tickets assigned" allows you to let the system automatically assign a resource from a group to a ticket.

The resource that is assigned must fulfill two prerequisites:

- The resource belongs to at least one of the specified groups.
- The resource has a status that can be assigned a ticket.

Then, the selected resource that will be assigned must meet three conditions:

1. The resource has never been assigned to the ticket.
2. The resource has the lowest number of open and assigned tickets/tasks.
3. The resource with the longest time since the last ticket assigned. (Applicable if several resources have the same lowest number of open and assigned tickets/tasks.)

Operation on loading a new ticket from a request; assigns a resource from the groups assigned in the request if no resource is already assigned.

Operation when saving a ticket or a process; assigns a resource from the Groups assigned in the ticket if no assigned resource is present in this ticket.

Approvers

This setting is only for the "Approval template." It lets you assign one or more "client or resource" default approvers to the task. Once the task has been saved, users automatically receive a notification of assignment by email as defined in the "Email model" option.

3.6.3. Creating a task from a copy

You can create a copy of an existing task to use the configurations that are already present as a basis to create your new item.

To do so, select the desired item and click on Copy; a copy will be generated containing all the configurations present in the field details, apart from the English name and French name fields.

3.6.4. Modifying a task

To modify an existing task, simply select the desired item.

You now have access to modify all the same available fields as when creating a new task except for the "Type" field.

You can also access a new section called "Related Requests," here is the information on this new section:

Related requests

This section shows all requests where this task is included in the request workflow.

4. Managing custom fields

In C2 ITSM, custom fields represent various fields that you can add to the C2 menus and customize their content according to your needs.

In this section, you can manage and customize the various lists, list items, list filters, custom fields, field sections and forms to be used in your C2 instance.

4.1. Managing your lists

List management in C2 contains several components and menus. A list can be used as a data source for a custom field of the List or Multiple List type.

To create a new list, you must follow the steps below:

1. Create a new list, name it, and choose a sorting type from the "Lists" menu.
2. Create the items that make up this list from the "List items" menu.
3. Optional: Filter the contents of the list using another list from the "List Filters" menu.

Some lists are required and configured at the system level. These are the lists included by default:

- Resource status, Ticket status, CI statuses, Files, Impact, Levels, Country, Reasons for ticket closure, Reasons for unavailability, Reports, CMDB relations, Client roles, Business services, Status, Note type, Change type, Message type, Resolution type, Urgency and Webhook.

4.1.1. Viewing your lists

The "Lists" tab shows all your custom lists. To display the contents of a list, you must select the list you wish to view.

To view the inactive lists, check deactivated items.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by partial or full name.

4.1.2. Creating a list

To create a new list, select **create** and fill in the associated field details.

Once the field details have been filled in, you must **save** the form for the changes to take effect.

Here are the details of the fields available to create a list:

General information

Field	Description
Active	This field is required. You can define the status of this list as active (Yes) or inactive (No) in C2.
Sort type	This field is required. This field lets you select the sorting order for this list: Alphabetical or Sequential. Alphabetical: Items are sorted in alphabetical order. Sequential: Items will be sorted according to the sequence number (#) set at creation.
English and French name	This field is required. You can enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

4.1.3. Modifying a list

To modify an existing list, select it to access the associated details.

You can access the same available fields as when you are creating a new list. See section: 4.1.2 Creating a list for more details.

> *Note: Only the sorting type can be modified on a system list.*

4.2. Managing your list items

Through the "List items" menu, you can create all the items that make up your lists.

Some system lists have additional configurations. Here are the system lists that contain additional configurations for their list items:

- Resource status
- Ticket status
- CI status
- Country
- Reasons for ticket closure
- Reasons for unavailability
- Status
- Message type

> *Note: Configuration changes for some system list items may be restricted or inaccessible.*

4.2.1. Viewing your list items

The List Items tab allows you to view the items that make up each of your lists. To display the contents of a list, you must select the list you wish to view, then select the item from the list you wish to view to see its contents.

To view the inactive items, check the Deactivated items option.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and by partial or full name.

> *Note: The search by name is done only within the selected list.*

4.2.2. Creating a list item

To create a new list item, you must first select the list to which you want to add an item, press on the Create button and fill in the associated field details.

Once the field details are filled in, you must click on save.

> *Note: Some system lists do not allow to create new items. However, you can modify certain configurations. For more information, please refer to section* *4.2.3.1 Restricting modifications to certain system lists.*

Here are the field details available to create a list item:

General information

Field	Description
Active	This field is required. You can define the status of this list item as active (Yes) or inactive (No) in C2.
Sequence #	The sequence number must be numeric but does not have to be unique. If you leave the field empty, a sequential number will be automatically assigned to the request, but you can modify it if needed.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French descriptions	This field lets you add a description to provide more details about this item. The description appears in a tool tip in the portal when the cursor hovers over this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

4.2.2.1. Additional configurations depending on list type

Some system lists contain additional configuration fields. Here is the additional configuration information depending on the system list type:

Resource state

Here are the additional configurations available for the Resource state type list:

Field	Description
Is assignable to a ticket.	This field is required. This field lets you determine if the status of the resource allows for assignment to a ticket or not.
Color	This field sets the display color of this item.
Is available to chat with clients	This lets you determine whether the status of the resource allows it to be available for chat with clients.

Ticket state

Here are the additional configurations available for the Ticket state type list:

Field	Description
Hold the calculation of the calculated resolution date	This field lets you pause the calculated resolution date for as long as the ticket has this status. The duration of the pause is added to the total of the calculated resolution date for the SLA once the ticket is no longer paused.
Hold the calculation of the expected resolution date	This field lets you pause the desired resolution date for as long as the ticket has this status. The duration of the pause is added to the total of the desired resolution date for the SLA once the ticket is no longer paused.
Hold the calculation of the	This field lets you pause the calculated response date for as

calculated response date	long as the ticket has this status. The duration of the pause is added to the total of the calculated response date for the SLA once the ticket is no longer paused.

CI state

Here are the additional configurations available for the CI status type list:

Field	Description
Activate visual impacts	Used to associate with the CI a color visual in the application and in the portal based on this status.
Background color	Used to select the display color of the CI's tile.
Message	Allows you to fill in the body of the message that appears as a tool tip on the CI tile.
Prevent ticket creation from the portal	Used to prevent the creation of tickets from the portal for requests whose service has this status.
Text color	Used to select the display color of the text associated with the CI.

Countries

Here are the additional configurations available for the countries type list:

Field	Description
Code	This field lets you fill in the country code.

Unavailability Reasons

Here are the additional configurations available for the unavailability reasons type list:

Field	Description
Restrict association	Use this field to prevent tickets from being created for the enterprise with this reason for unavailability.

Message types

Here are the additional configurations available for the message type list:

Field	Description
Text color	Use this field to select the display color of the text in the body of the message.
Background color	Use this field to select the display color of the message's banner.

4.2.3. Modifying a list item

To modify an existing list item, select it to access the associated details.

You can access the same available fields as when you are creating a new list item. See section 4.2.2 Creating a list item for more details.

4.2.3.1. Modification restrictions on certain system lists

Some lists have system list items with fields that are restricted or cannot be modified. Here are the affected list items:

List	List item	Restrictions
Resource state	Available	The general information section cannot be modified. The configurations section can be modified.

Ticket state	Waiting for approval	The general information section cannot be modified. The configurations section can be modified.
CI state	Not applicable	This item cannot be modified.
Ticket Closing Reason	Canceled, Resolved	This item cannot be modified.
Status	All list items	It is not possible to add or deactivate statuses. The statuses can be renamed.

4.3. Managing list filters

In C2, a list filter is used to filter the content of a list type field from a second list type field.

For example: If you wish to allow the indication of an intersection of two streets in the custom fields of a request, you must perform the following steps:

1. Create a list that will be used to group together the street names.
2. Create the list items for each street name on the list created in the first step.
3. Create two list-type custom fields and link each of them to the list created in the first step.
4. Create a list filter with the ticket target, select the first custom field created in step 3 as the source list and the second custom field as the filtered list.
5. Select the filtered list items for each of the source list items.

Source List		Filtered List
First street		First street
	X	Second street
	X	Third street
	X	Fourth street
Second street	X	First street
		Second street
	X	Third street
	X	Fourth street
Third street	X	First street
	X	Second street
		Third street
	X	Fourth street
Fourth street	X	First street
	X	Second street
	X	Third street
		Fourth street

Result

When a user selects a street from the first drop-down list, the choices in the second list show only the items that were selected in the filtered list.

4.3.1. Viewing your list filters

The **List Filters** tab shows a full list of your list filters. To display the content of a filter, you must select the item you wish to view.

To view the inactive items, check the **Deactivated items** option.

To facilitate navigation, you can search your existing items using the **Search by name** field, which enables you to search by both number and by partial or full name.

4.3.2. Creating a list filter

To create a new list filter, select **create** and fill in the associated field details.

Once the field details have been filled in, you must **save** the form for the changes to take effect.

Here are the field details available to create a list item:

General information

Field	Description
Active	This field is **required**. You can define the status of this list filter as active (Yes) or inactive (No) in **C2**.
Target	This field allows you to select whether the list filter should be applied to a particular target. After selecting a target, you can apply the list filter to a list system field in addition to the custom fields.
English and French name	This field is **required**. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French	This field lets you add a description to provide more details about this item.

description	*Note: If your C2 environment is monolingual, only the set language is displayed.*

Filter

Field	Description
Source list	This field is **required**. This field lets you select the source list on which you want to apply a filter.
Filtered list	This field is **required**. This field lets you select a second list from which you want to select the items that will be linked to this filter.

4.3.3. Modifying a list filter

To modify an existing **list filter**, select it to access the associated details.

After a **list filter** is created, some fields will be locked and cannot be modified. Here are the items that remain available for modification:

- Active
- English and French name
- English and French description
- Filtered Items inside **source list** from **filtered list** items.

> *Note: It is not possible to select a new source list or filtered list. However, you can add or modify items for each of the lists from the List items menu.*

4.4. Managing your custom fields

Custom fields are used to manage a library of custom fields that you can use in several functions of the application, such as the client form, the enterprise form, your requests, your task templates, your services, your CMDB CI categories and your satisfaction forms.

4.4.1. Viewing your custom fields

The **Custom fields** tab shows the complete list of your custom fields. To display the content of a custom field, you must select the item you wish to view.

To view the inactive items, check the **Deactivated items** option.

To facilitate navigation, you can search your existing items using the **Search by name** field, which enables you to search by both number and by partial or full name. You can also filter items by **Type** and by **Target**.

> *Note: Search by name is affected by filters. If a search yields no results, remove the filters, and run the search again.*

4.4.2. Creating a custom field

To create a new item, select **create** and fill in the associated field details.

Once the field details have been filled in, you must **save** the form for the changes to take effect.

Here are the configuration sections to complete for creating a custom field:

General information

Field	Description
Active	This field is **required**. Through this field, you can check whether this **list** is active in **C2**.
Target	This field is not mandatory by default; however, it can become mandatory depending on your choice of custom field **type**. The available targets are: **None**, **Tickets**, **CIs**, **Clients**, or **Enterprises**
Tag	You can uniquely identify this field by a keyword to recognize it in a search, a configuration or when using a tag. The identifier can only include letters, numbers, or underscores and has a 64-character limit.

English and French name	This field is **required**. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
Type	This field is **required**. This field lets you select the type associated with this custom field to determine how it works.

4.4.3. Selecting the type of custom field

When creating a **custom field**, you must assign it a **type** to determine how it works.

Here are the details of the types available to create the custom fields:

Application

This type of custom field is used to start applications such as Windows Remote Desktop, the TeamViewer app or even the notepad tool from a **Resource** workstation.

In the field configuration, the “application name” is used to give a generic name that does not contain spaces.

To use it, the resource must run the program “ATOM.Runner.exe” directly on its workstation, so that the program modifies the registry key.

To access this program, you must add “/downloads” to your C2 ITSM URL, for example https://yourinstance.c2atom.com/dowloads.

Once the key is defined, you can insert it in a few places (e.g., the **client form**) and use it through a ticket. When the application sees that an "application" field is used, the gear wheel icon appears on the box. It is then possible to run the application from a ticket. If several fields of this type are in the same form, the application proposes all the targeted applications.

Attachments

This type lets you add attachments in Clients, enterprises, Requests, Task templates, Services, CI Categories, KB article.

You can make this type of field required for documents in a specific request, such as a test plan, project plan and impact analysis.

The custom field of this type can be used in an email model to send the attachment automatically.

It is also possible to specify whether a single file or several files are accepted.

The schedule already exists in the system from the Management > Advanced settings > Other settings > Working hours menu.

If you want to modify the schedule of a service, you can create a field of this type and add it in the CMDB Category / Services.

When a schedule-type field is used in the service, it impacts the service level (SLA) of requests related to the service.

For example, the enterprise is open from 8 a.m. to 5 p.m. However, a specific service is open from 8 a.m. to 8 p.m.

All requests have the new schedule defined when it comes to the calculation of service levels. As such, for a ticket that is created at 5 p.m. and has a one-hour resolution, the calculated resolution date is at 6 p.m. rather than 9 a.m. the next morning like other services.

Button

This type of field can only be used by resources on the application and not by clients through the portal. To access it, you must save the ticket a first time.

To be valid, the button-type custom field requires a target.

You can set the text color and background color of the button. You can also make a pop-up form appear to request more information.

Here is the list of possible actions on the button:

- Send an email
- Define the value of
- Create
- Calculate
- Call a web service
- Send a notification

Check box

This type is used to define a field as being a check box. It is not possible to require that only one box be checked among a selection of several values. If the field is defined as required, the user must check the box.

CI and multiple CI

This type of autocomplete search for items in the CMDB.

Search fields can be modified to find a CI through another field than its name and number. For example, its serial number.

This field can also be filtered to display the desired CIs. For example, filter only CIs in the “printers” category or according to a custom field defined in the CIs (Filters section).

Client and Multiple Client

This type of field is an autocomplete field and searches for clients of the application.

You can filter this field to only display the desired clients (e.g., only show the managers). To do this, you must create a rule in the “filter” section. For example, you can add your name to the client record using a custom field to enter an approving authority. When you fill in information in this field in the form, the autocomplete search only searches for clients defined in their client record as being managers.

Email

This type of “text” format requires a valid email (with @ and .com, .ca, etc.).

A validation code verify that the email address exists, and that the client has access to it. When clicking on the email validation custom field, the client receives an email with the code that they must then enter in the request to submit it.

Date

This type only lets you select a date, either manually or using a calendar.

Date & time

This type lets you select a date and time. You can also choose one or the other. Entry can be done manually or using a calendar.

External data and multiple external data

This type lets you fetch data from an external system in real time. There are two ways to make this connection, either with ODBC or using a Web Service.

ODBC: you must specify your connection string to connect to your database server (e.g., SQL server).

You must define the table or view where to look for the information. You must then indicate the search field and the result field you want on screen. If you need several result fields, it is possible to create fields linked to this external data type field.

Webservice: To use this type of source, you must first create an API call template. You must then select an API call template from the drop-down list and specify the desired mapping and whether you want to perform a conversion.

Decimal

This numeric type contains decimals in function of the chosen configuration.

In the formula section, you can pre-define a formula, for example if you wish to calculate a quantity multiplied by a price or a total with taxes.

Directives

This type allows you to enter instructions in the desired language inside HTML fields as well as define its formatting. This field is read-only and cannot be modified when inserted in requests, forms, or templates.

The “Number of lines (height)” field allows you to determine the maximum height for the display of this custom field. By default, the field is empty which means that the content will be displayed at full height.

> *Note: You cannot use the Directives type field in conditions or actions. Whether in processes, search, workflows, etc.*

Whole

This numeric type contains only whole numbers.

In the formula section, you can pre-define a formula, for example if you wish to calculate a quantity multiplied by a price or a total with taxes.

Enterprise and Multiple enterprise

This type of autocomplete lets you choose an enterprise from the list of all the enterprises in the system.

You can also add filter sections which lets you configure logical operators.

Rating

This type displays rating stars within a request. The user can select a half star or a full star.

Geolocation

This type lets you select a latitude and longitude on a geographical map.

You must configure a starting location that shows up on the user's geographical map.

> *NOTE: It is not possible to search by address or postal code.*

Grid

This type allows you to add as many rows as you want on a grid. For example, for a purchase order containing several items. However, you can only add up to eight columns.

You can also use the **read-only, required,** and **linked fields** functions. You can even specify a total column for the table.

For the total value list to have a value, you must absolutely define a decimal or whole number field in the columns.

> *NOTE: The grid can no longer be modified once it has been used in a request.*

Knowledge base and Multiple knowledge base

This type of field is used to add a custom Knowledge Base-type field to a form configuration. Single or multiple selection is possible.

Time

This type lets you select a time. You can enter it manually or using a clock.

Label

This type is relevant if you have information used in additional information sections that you specifically want to see. You can then use this type to specify the title of your sections.

List and Multiple list

This type is used to associate the field with a list previously created in list management. This type supports a single selection.

You can also create a drop-down list of CIs (for example, a list of several printers).

Memo

This type is used to enter several lines of text in the field. It also lets you define formatting and validation.

The Auto-tag field matches hook, users, date, and time. Example: [user 20XX-0X-0X 16:25:19]. You can choose to put an automatic auto-tag or not. The default value is "no."

Number of lines (height): By default, the height is set to five. Depending on your needs, you can increase or decrease this default value.

Maximum length: Sets the maximum number of characters available for this memo field.

HTML support: This field specifies HTML controls on the memo field. However, this can have an impact on performance, for example, on how long it takes for the ticket to be saved.

> *NOTE: If HTML support is enabled, an impact is possible on the field display in the email model or print template. The default value is "yes."*

Encrypted: A field can be encrypted in the database. For example, for any confidential information that a DBA (Database Manager) should not see. The default value is "no."

Sequence number

This field type cannot be modified and is generated automatically. When used, it is incremented automatically (for example, to generate a single budget or PO number).

External web page

This type displays an external web page in a request or in a CI.

To configure this custom field, you must choose the protocol (either HTTP or HTTPS), the URL and the frame height for its display. The website must support being opened by another application.

Reservation

This type is always linked with CI fields. The reservation can be made on any item of the CMDB.

To specify on what information, you want to allow the reservation, you must use the filter section to define it correctly.

If not, every item is to be reserved within the chosen item, you must create a principle to identify the CIs you want. For example, you can add a field in the CI category (attribute) to filter the CIs that can be reserved.

For example: You want to offer the possibility to reserve a projector. However, you want to limit access to only certain devices for reservations from your list of projectors. In this case, you need to add an item that defines which ones are available for reservations.

In a request via the application or the portal with the help of the magnifying glass icon, you can access a calendar to select one or more dates and one or more CIs.

Resource and Multiple resource

This type is an autocomplete field that searches for the "users" of the application's resources.

This field can be filtered to display the desired resources, for example only the managers of a particular department. To do this, you must add the information taking into account to filter the resources in the filter section. For example, you can add your name in the resource record of a service field. When you enter information in this field, the search by autocomplete only searches for resources with this field defined in their record.

Text

This type allows you to set up text validation and formatting by adding the "Formatting & Validation" section.

This new section allows you to configure the following elements on the text field: case sensitivity, maximum length, an input mask, and encryption in the database.

Ticket and Multiple ticket

This type of field is used to add a custom Ticket-type field to a form configuration. Single or multiple selection is possible.

You can add a filter to limit the number of items found.

URL

This type lets you have a URL format field as well as a button providing access to the targeted link. For example, you want to offer documentation templates. Via the portal, the user can now access the link allowing them to find the template they want.

4.4.4. Modifying a custom field

To modify an existing **Custom field**, select it to access the associated details.

You can access the same available fields as when you are creating a new **Custom field**, apart from the **Type** field which cannot be modified. See section 4.4.2 Creating a custom field for more details.

4.5. Managing your field sections templates

The "Field Sections" section of the management menu lets you create multiple **Field section** templates that can be used across C2 application functions such as tickets, clients, enterprises, and CIs.

4.5.1. Viewing your field section templates

The **Field section (Templates)** tab provides you with a complete list of your field section templates. To display the content of a field section, you must select the item you wish to view.

To view the inactive items, check the **Deactivated items** option.

To facilitate navigation, you can search your existing items using the **Search by name** field, which enables you to search by both number and by partial or full name.

4.5.2. Creating a new field section template

To create a new item, select **create** and fill in the associated field details.

Once the field details have been filled in, you must **save** the form for the changes to take effect.

Here are the configuration sections to complete for creating a field section template:

General information

Field	Description
Active	This field is **required**. Through this field, you can check whether this **field section** is active in

	C2.
Target	A target is not required. However, if one is selected, the section template only displays in that target type. To define a visibility condition or certain options in the fields relating to system fields, it is necessary to select the target. Or, when using the section template, you can redefine the options and add the necessary configuration depending on the target.
English and French name	This field is **required**. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Template

Field	Description
Availability	This field is **required**. There are two types of availability: **Private** availability identifies sections that can only be accessed "internally." So only "resource" users have the ability to view these sections in a ticket. **Public** availability displays sections in the portal. It also enables clients to document these fields when creating a new ticket and to view them afterwards.

Visible Section on conditions	This option lets you select a condition to make the section visible, or to make the form dynamic. For more information, refer to section 5.4.4 Applying conditions.
Adding a new row	Using this field, you can create field rows and choose the number of fields desired for each row.

Configuring a field

To configure a field, you must select the **Field configuration** pencil icon inside the field you wish to configure.

Here is the information on the configuration items available:

Field	Description
Select a custom field	This field lets you select a custom field from your list of available custom fields. To link fields to the form, you must first create custom fields. Refer to **Management > Custom Fields** for more details.
Creating a new custom field	This button is only available when no custom field is selected from the drop-down menu. Once you press it, a new tab opens and lets you create a new custom field.
Edit custom field definition	This button is only available when a custom field is selected from the drop-down menu. Once you press it, a new tab opens and lets you edit the content of the selected custom field.
Read-only	Displays a value in the field without a user being able to modify it. However, you can decide when to display, “Upon creation only and if the field has a value.” You can also limit modification to certain groups.
Required	Lets you make a field required for saving a ticket. The rule can also be defined if another field has a value. If the

	targeted field is a check box, the field becomes required if the box is checked. If the targeted field is of the list type, you can then choose an item from this list.
Linked field	Links the field of the form to a source to synchronize the value of a field from the source. For example, if you target the client (requester) and a field in their form (for example, their phone number), when they are selected in the request, their phone number is automatically copied into the form field. This makes it possible to create several scenarios with different sources of the form.
Validations	By pressing on "Validation" a popup window appears and lets you create a business rule on the field to frame the entry of a specific value. For example, if it is a date-type field, you can force the user to enter a date greater than the date entered in another field of the form, etc. For more details on logical operators, please refer to section 5.4.4.1 Logical operators.

4.5.3. Creating a field section from a copy

You can **create a copy** of an existing **field section** to use the configurations that are already present as a basis to create your new item.

To do so, select the desired item and click on **Copy**; a copy will be generated containing all the configurations present in the field details, with the exception of the **English name** and **French name** fields.

4.5.4. Modifying a field section

To modify an existing **Field section**, select it to access the associated details.

You can access the same available fields as when you are creating a new **field section**. See section 4.5.2 Creating a new field section template for more details.

4.6. Managing your forms

There are two **default forms included in the system**, the **client form**, and the **enterprise form**. You can create new forms as needed.

Forms can also be used for surveys. They can be opened via a request, for example with a button-type field, or they can be sent by email.

4.6.1. Viewing your forms

The **Forms** tab shows the full list of your forms. To display the content of a form, you must select the item you wish to view.

To view the inactive items, check the **Deactivated items** option.

To facilitate navigation, you can search your existing items using the **Search by name** field, which enables you to search by both number and by partial or full name.

4.6.2. Modifying client form

This form is used to define the information you want to enter in the client file for all portal users.

The form already has default system fields. You can add more sections if needed.

4.6.3. Modifying enterprise Form

This form lets you define the information you want to register for your enterprises. The form already has default system fields. You can add more sections if needed.

4.6.4. Creating a customized form

To create a new **form**, select **create** and fill in the associated field details.

Here are the details of the fields available to create a form:

General information

Field	Description
Active	This field is required. Through this field, you can check whether this form is available to users.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. Additionally, the description is visible to clients on the portal. *Note: If your C2 environment is monolingual, only the set language is displayed.*

You can add field sections and select custom fields that were previously created. To add a new field section, you must select Add section.

Here are the details of the items associated with a new section:

Additional information

Field	Description
Availability	This field is required. There are two types of availability: Private availability identifies sections that can only be accessed

	"internally." So only "resource" users have the ability to view these sections in a ticket. **Public** availability displays sections in the portal. It also enables clients to document these fields when creating a new ticket and to view them afterwards.
English and French name	This field is **required.** Enter the name in English and French—this section is required.
Visible Section on Conditions	This option lets you select a condition to make the section visible, or to make the form dynamic. *Note: For more details on the conditions and logical operators, please refer to section: 6. APPENDIX A.*
Adding a new row	This button lets you create field rows and choose the number of fields desired for each row.

Configuring a field

To configure a field, you must select the **Field configuration** pencil icon inside the field you wish to configure.

Here is the information on the configuration items available:

Field	Description
Select the custom field	This field lets you select a custom field from your list of available custom fields. To link fields to the form, you must first create custom fields in the app. *Note: For more details on custom fields, please refer to section 4. Managing Custom Fields.*

Creating a new custom field	This field lets you open the tab for creating a new custom field.
Read-only	Displays a value in the field without a user being able to modify it. However, it is possible to decide when to display, "Upon creation only and if the field has a value." You can also limit modification to certain groups.
Required	Lets you make a field required for saving a ticket. The rule can also be defined if another field has a value. If the targeted field is a check box, the field becomes required if the box is checked. If the targeted field is of the list type, you can then choose an item from this list.
Linked field	Links the field of the form to a source to synchronize the value of a field from the source. For example, if you target the client (requester) and a field in their form (for example, their phone number), when they are selected in the request, their phone number is automatically copied into the form field. This makes it possible to create several scenarios with different sources of the form.
Validations	Used to create a business rule on the field to frame the entry of a specific value. For example, if it is a date-type field, you can force the user to enter a date greater than the date entered in another field of the form, etc. *Note: For more details on the conditions and logical operators, please refer to section: 6. APPENDIX A.*

4.6.5. Modifying a customized form

To modify an existing custom form, select it to access the associated details.

5. Managing templates

In C2, a template refers to a modifiable and reusable model.

In this section, you can manage your templates. Here are the different types of templates available in this menu:

- Email
- Printing
- Filter
- Search
- Grid
- Action

5.1. Managing your email templates

In C2, an Email template refers to a reusable and modifiable template that will be used during the processing of a request.

The Email template allows for customization of the text sent and can contain text, hyperlinks, images, and system tags.

These templates are customizable and contain tags that query form fields. Practically the entire form can be found in a tag.

5.1.1. Viewing your email templates

The Email (Templates) tab shows a complete list of your email models.

To display the template contents, simply select the desired template.

To facilitate navigation, you can search your existing templates using the Search by name field, which enables you to search by both template number and name.

To view the inactive templates, check deactivated items.

Some templates are identified as system templates and have a padlock icon in the Secured column; modification of certain fields within this template will not be permitted.

5.1.2. Creating an email template

To create a new template, select **create** and fill in the associated field details.

Here are the field details available to create this template:

General information

Refer to the following list for the details of each field and its available options:

Field	Description
Active	This field is **required**. Through this field, you can check whether this template is available for users.
English and French name	This field is **required**. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Recipient section

Lets you configure one or more default recipients ("To," "CC" and "BCC" fields) in an email template. The goal is to avoid errors, since certain email templates must always be sent to the same individuals in a ticket (Client, Resource, Approving authority, etc.)

Refer to the following list for the details of each field and its available options:

Field	Description
To	Automatically populated by the [PrincipalClient.ContactInfo.EmailAddress/] tag, which refers to the email address of the ticket's primary client. This field is used to enter email addresses directly or custom tags. For more details on the tags, please refer to the Tags Guide.
CC	Automatically populated by the [Clients.Client.ContactInfo.EmailAddress/] tag, which refers to the email address of all the clients on the ticket. This field is used to enter email addresses directly or custom tags. For more details on the tags, please refer to the Tags Guide.
BCC	This field is empty by default. This field is used to enter email addresses directly or custom tags. For more details on the tags, please refer to the Tags Guide.

Email body section

This is where you add an image, a table or edit the HTML source code. The body of the email has two field sections, English email, and French email, each of which includes a subject and the body of the email.

> *Note: For more details on the email tags available, refer to the Tags Guide.*

Security

The Security section allows you to restrict access to this template to a specific group or groups of resources from the autocomplete field. If no group is defined, by default the template is accessible to all resources.

5.1.3. Creating a template from a copy

You can create a copy of an existing template to use the configurations that are already present as a basis to create your new item.

To do so, select the desired item and click on Copy; a copy will be generated containing all the configurations present in the field details, with the exception of the English name and French name fields.

5.1.4. Modifying an existing template

To modify an existing email template, select it to access the associated details.

You can access the same available fields as when you are creating a new email template.

Additionally, you are now able to add attachments. Here are the details of this new section:

Attachments

In the Attachments section, you can include one or more attached files in an email template, so that the template's attachments are automatically added as an attached file to the email. To attach a file, you must press the Browse button and select the desired file from the file explorer window.

5.2. Managing your print templates

Here, you can create print templates to use during the processing of a request.

These templates are customizable and can contain tags that query form fields, the same as for email templates.

Practically the entire form can be found in a tag.

5.2.1. Viewing your print templates

The Print (Templates) tab shows you a complete list of your print templates.

To display the template contents, simply select the desired template.

To facilitate navigation, you can search your existing templates using the Search by name field, which enables you to search by both template number and name.

To view the inactive templates, check deactivated items.

5.2.2. Creating a print template

To create a new template, select **create** and fill in the associated field details.

Here are the field details available to create this template:

General information

Field	Description
Active	This field is **required**. Through this field, you can check whether this template is available for users.
Availability	This field is **required**. **Private:** The template is only available in the application. **Public:** The template is available in the application and in the client portal.
English and French name	This field is **required**. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

English and French print template

Here, you can build the body of your print template in an HTML editor.

5.2.3. Creating a template from a copy

You can **create a copy** of an existing **template** to use the configurations that are already present as a basis to create your new item.

To do so, select the desired item and click on **Copy**; a copy will be generated containing all the configurations present in the field details, apart from the **English name** and **French name** fields.

5.2.4. Modifying an existing template

To modify an existing **Print template**, select it to access the associated details.

You can access the same available fields as when you are creating a new **Print template**.

5.3. Managing your filter templates

The Management > Templates > Filter menu is where you manage your public filters.

Filters let you display items that meet the filter criteria. A filter can target **tickets**, **CIs**, **clients**, or **enterprises**.

5.3.1. Viewing your filter templates

The **Filters** tab shows a complete list of your filter templates.

To display the template contents, simply select the desired template.

To facilitate navigation, you can search your existing templates using the **Search by name** field, which enables you to search by both template number and name.

To view the inactive templates, check **deactivated items**.

5.3.2. Creating a filter template

To create a new template, select **create** and fill in the associated field details.

Here are the field details available to create this template:

General information

Field	Description
Active	This field is **required**. Through this field, you can check whether this template is available for users.
Target	This field is **required**. The targets are Tickets, CIs, Clients, and Enterprises. The target has an impact on the fields available in the conditions as well as those available in the actions. Moreover, depending on the target, additional options are available.
English and French name	This field is **required**. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
Grid template	You can associate a grid template to the filter to see the desired fields in the grid, depending on the filter.

	Note: When the target is "Tickets," this field is only visible if you select the "Grid" view type. This field is always visible for other targets.

Security

The Security section allows you to restrict access to this template to a specific group or groups of resources from the autocomplete field. If no group is defined, by default the template is accessible to all resources.

5.3.3. Additional settings according to the target

Tickets as a target

Here are the details of the fields available to create a filter targeting the tickets:

Field	Description
Ticket type	If the filter concerns only one ticket type, it is more efficient to indicate this in this section. If more than one ticket type is necessary, you must indicate this in the condition.
Status Filter	This field is required. This field contains toggle buttons that lets you specify whether you want to see the tickets or tasks that are open or closed. You can also specify to see draft tickets or only tickets that are assigned to the resource that runs the filter.
View type	This field is required. You can select whether you want to see the filter in Grid, Kanban, Calendar, or Gantt view.

CIs as a target

Here are the details of the fields available to create a filter targeting the CIs:

Field	Description
CMDB type	This drop-down menu allows you to choose one of the CMDB types so that the filter only applies to that specific CMDB type. This method is more efficient than using conditions but if you want your filter to apply on more than one CMDB type you must create a condition. *Note: For more details on the conditions and logical operators, please refer to section: 6. APPENDIX A.*

Clients as a target

Here are the details of the fields available to create a filter targeting the clients:

Field	Description
Include resources	This field allows you to specify whether you want to include the resources in the filter.

5.3.4. Applying conditions

Conditions are logical rules that are evaluated sequentially by the system and that precisely locate the items searched.

> *Note: For more details on the conditions and logical operators, please refer to section: 6. APPENDIX A.*

5.3.5. Modifying an existing template

To modify an existing filter template, select it to access the associated details.

You can access the same available fields as when you are creating a new filter template.

5.4. Managing your search templates

The Management > Templates > Search menu allows you to create public search templates based on existing requests that you can modify as needed.

You can export your results in the form of a report or in an import format. You can also execute a batch action on the items found through the search.

5.4.1. Viewing your search templates

The Management > Templates > Search menu shows a complete list of your search templates.

To display the template contents, simply select the desired template.

To facilitate navigation, you can search your existing templates using the Search by name field, which enables you to search by both template number and name.

To view the inactive templates, check deactivated items.

5.4.2. Creating a search template

To create a new template, select create and fill in the associated field details.

Here are the field details available to create this template:

General information

Field	Description
Active	The default value is yes. Through this field, you can check whether this template is available for users.
Target	This field is required. The targets are Tickets, CIs, Clients, and Enterprises. The target has an impact on the fields available in the conditions as well as those available in the actions. Moreover, depending on the target, additional options are available.

English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French descriptions	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

5.4.3. Configuration settings according to the target

Tickets as a target

Here are the details of the fields available to create a filter targeting the tickets:

Field	Description
Ticket type	If the filter concerns only one ticket type, it is more efficient to indicate this in this section. If more than one ticket type is necessary, you must indicate this in the condition.
Filter based on statuses	This field is required. This field lets you specify whether you want to see the tickets or tasks that are open or closed.

CIs as a target

Here are the details of the fields available to create a filter targeting the CIs:

Field	Description
CMDB type	If the filter concerns only one CMDB type, it is more efficient to indicate this in this section. If more than one CMDB type is necessary, you must indicate this in the condition.

Clients as a target

Here are the details of the fields available to create a filter targeting the clients:

Field	Description
Include resources	By default, this field is set to yes. This field allows you to specify whether you want to include the resources in the filter.

Enterprises as a target

The Enterprise target does not have any additional fields.

5.4.4. Applying conditions

Conditions are logical rules that are evaluated sequentially by the system and that precisely locate the items searched.

> *Note: For more details on the conditions and logical operators, please refer to section: 6. APPENDIX A.*

5.4.5. Restricting access by group

The Security section restricts search template access to one or some specific user groups. If no group is defined, the search template is accessible to all resources, by default.

5.4.6. Creating a template from a copy

You can create a copy of an existing template to use the configurations that are already present as a basis to create your new item.

To do so, select the desired item and click on Copy; a copy will be generated containing all the configurations present in the field details, with the exception of the English name and French name fields.

5.4.7. Modifying an existing template

To modify an existing search template, select it to access the associated details.

You can access the same available fields as when you are creating a new search template.

When you modify a template target, all conditions are reset to be consistent with the new target selected.

5.5. Managing your grid templates

Through the Management > Templates > Grids menu, you can create and manage grid templates. Grid templates are used to control the display of the various entities also referring to as targets such as tickets, clients, enterprises, and the CMDB within the application. You can also use them to control the search and filter displays.

5.5.1. Viewing your grid templates

The Grids (Templates) tab shows a complete list of your grid templates.

To display the template contents, simply select the desired template.

To facilitate navigation, you can search your existing templates using the Search by name field, which enables you to search by both template number and name.

To view the inactive templates, check deactivated items.

5.5.2. Creating a grid template

To create a new template, select create and fill in the associated field details.

Here are the field details available to create this template:

General Information

Field	Description
Active	Through this field, you can check whether this template is available for users.
Target	This field is **required.** This field lets you choose the target to which you apply the template; the available targets are tickets, CIs, clients, and enterprises. For the CI target, you can select with which type of CMDB you want to associate the template.
English and French name	This field is **required.** This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
Grid template	This field lets you specify the columns and their order for this grid template. Click on the arrow of one of the column-header fields, then on **columns** in the context menu to add other fields as column headers. You can also select the system and custom fields created previously. *Note: Multiple value fields cannot be used in display grids.*

Number of items per page	This field lets you define the default number of items visible per page; the options are: 10, 25, 50, 75, and 100. The default number of items per page is 25.

Security

The Security section restricts grid template access to one or more specific user groups. If no group is defined, the grid template is accessible to all resources, by default.

5.5.3. Modifying an existing template

To modify an existing grid template, select it to access the associated details.

You can access the same available fields as when you are creating a new grid template.

When you modify a template target, all conditions are reset to be consistent with the new target selected.

5.6. Managing your action templates

Through the Management > Templates > Actions menu, you can create new action templates to reuse them in several workflows, processes, and batch actions. You can also save an existing action as an action template.

In C2, an action represents a command that the system execute based on an associated trigger.

The actions available in C2 are:

- Send email
- Set Value Of
- Create
- Calculate
- Send survey
- Call Web Service
- Send Notification

Depending on the target selected, the actions and destinations may be different.

An action template containing a grid can only be used in the processes.

All C2 menus that contain the "Action(s)" section such as workflow, processes, or batch actions, allow you to select an existing action template; this replaces the actions in progress.

You can modify the action template settings and then choose between two saving options: either the "save" button which overwrites the existing template or the "save as" button which allows you to create a new template from the defined actions.

5.6.1. Viewing your action templates

The Management > Templates > Actions menu shows a complete list of your action templates.

To display the template contents, simply select the desired template.

To facilitate navigation, you can search your existing templates using the Search by name field, which enables you to search by both template number and name.

To view the inactive templates, check deactivated items.

5.6.2. Creating an action template

Here are the field details available to create this template:

General information

Field	Description
Active	Through this field, you can check whether this template is available for users.
Target	This field lets you choose the target to which you apply the template.
Grid	This field lets you associate a grid template to this item.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Action(s)

Refer to the following list for the details of each action and its available options:

Action	Description	Options
Send Email	This field is used to send an email based on a predefined template.	Email template: Required. You must select an existing email template. Original email account: Optional. You can select which email address to use when sending an email. If none is selected, the default email address will be used. Recipient: If you select "Specific," you can specify whether the recipients are those from the email template or specific recipients (Clients/groups). It is also possible to select a source (Ticket, Main CI, Main client, Enterprise) to select a client-type custom field from this target. Attach a report: You can attach an existing report to an email. For more details on reports, please refer to section 10. Managing reports.
Set Value Of	Modifies the value of a field.	Destination: This field displays all entities and modifiable custom fields for the defined target. For example, if the ticket target is selected, you can modify the ticket itself, its child tickets (tasks and requests in the workflow), the main CI or all associated CIs, the main client or all clients associated with the ticket, the main client's enterprise, and the tickets it refers to or is a reference for. You can also modify all entity

		custom fields (client, resource, CI, ticket, enterprise). Fields: Here you find all system fields, custom fields, and available field sections according to the destination defined. Source: The source can be a specific value, a variable, or the value of another entity field. The only requirement is that it must be the same field type. Value: Value you wish to assign to the destination field. Note: For multiple-value fields (clients, CIs, etc.), the operators Add or Delete are available when configuring the action.
Create	Lets you create a ticket, task, note, client, CI, or enterprise.	Type: Lets you select the type of item to create. Your options vary according to the type. Ticket • Template: Selects the request to create. • Add to the workflow: YES: The ticket created will be added to the workflow at the stage indicated. NO: The ticket will be added to the "Reference to" field, which is found in the ticket's Reference section. Task • Template: Selects the task template to create • Stage: The task created will be added to the workflow at the stage indicated. If no stage is indicated, the task will be added at the stage where the workflow is. • Quantity: You can create one single task or create one task per CI in a multiple CI-type field. Note • Availability: Lets you specify whether the

		note is public, and therefore visible in the portal, or private, and therefore available only for resources. • Type: Selects a note type. • Title: Defines the title of the note. Tags for copying information from another source are accepted. • Content: Defines the note's content. Tags for copying information from another source are accepted. For more details on the tags, please refer to the Tags Guide. Client • Enterprise: The enterprise is required, and you cannot define a source field; you need a fixed value. After creating it, you can remove the default enterprise and add the correct enterprise. CI • Type: You are required to select a CMDB type, otherwise, choosing a folder and a category becomes impossible. • Folder: The folder is required, and you cannot define a source field; you need a fixed value. After creating a folder, you can modify it with an action. • Category: The category is required, and you cannot define a source field; you need a fixed value. After creating a category, you can modify it with an action. • Status: You must indicate a default status when creating a CI. Set the value of: Sets one or several values for the fields of the newly created entity.
Calculate	Calculates an equation, a concatenation,	Equation: Performs an arithmetic equation in which the order of priority of the mathematical operators is respected.

	or an offset for a defined source. The results of an equation will be displayed in a destination field of the text, memo, or digital type. The results of a concatenation will be displayed in a destination field of the text or memo type. The results of an offset will be displayed in a destination field of the date/time, date, or time type.	For example, the following equation is used to display in a text field the result of a calculation of a 5% tax on a given price, according to the quantity requested: Operator = Equation, Destination = Text field Source = Ticket, Field = Price, Operator = * Source = Ticket, Field = Quantity, Operator = * Source = Specific, Value = 0.05 Concatenation: Combines several specific values and single or multiple fields into a single chain of characters. You must also define the concatenation language if you have a bilingual environment. For example, the following concatenation represents the definition of the summary of a hiring ticket, including the first and last names of the new employee. Operator = Concatenation, Destination = Summary Source = Specific, Value = Hiring of Source = Ticket, Field = First name Source = Specific, Value = (insert a space) Source = Ticket, Field = Last name *Note: Field tags or HTML tags are accepted in the specific source.* Offset: Adds to or subtracts time from a date. You can add or subtract minutes, hours, days, months, and years. If you want working days to be taken into account, select Yes in the W.D. field. For example, the following offset represents the addition of a technician's travel time on the desired resolution date to ensure better follow-up of SLAs. Operator = Offset, Destination = Desired resolution date, Source = Calculated resolution date

		Source = Main Client/Validator, Field = Travel time (hours), Time = Hour(s) W.D. = Yes *Note: If you select a destination in text format, you can define the display format for the result of the equation.* *For information on display formats, refer to the following website:* *https://docs.microsoft.com/en-us/dotnet/standard/base-types/standard-date-and-time-format-strings*
Send Survey	This field is used to send a survey that was previously defined in the form templates.	Form: Selects a form available in the list. This list is based on the forms available in the Custom fields > Forms section. Only one survey can be completed per ticket.
Call Web Service	This field is used to call a web service previously defined in the API call templates	API call template: Selects an API available in the list. This list is based on the APIs previously defined in the Automations > API Calls section.
Send Notification	This field is used to send a notification to a recipient	Recipient: Selects the recipient type specifically or from an entity field.

5.6.3. Modifying an existing template

To modify an existing action template, select it to access the associated details.

You can access the same available fields as when you are creating a new action template.

6. Managing automations

In C2, the Management > Templates > Automations menu is used to configure actions that will be automatically executed when their conditions are met. The automation applies to the various C2 entities.

When an entity undergoes a change, for example, a change in a ticket status, in a field value, the creation of a CI, etc., this moment is deemed an event.

An automation can be generated in two ways:

- In the workflow of a request, a ticket, or a task. Automation is executed in a linear fashion and are sequential after a ticket or a task is logged.
- In a process template. This template comprises one or several actions that are executed sequentially after using a field of the button type or after a ticket or a task is logged, when the defined condition(s) are(is) met.

6.1. Managing your automation folders

The Management > Automations > Folders menu regroups the processes in folders and subfolders to locate them easily. You can move a folder to another one if needed.

6.1.1. Viewing your automation folders

The Management > Automations > Folders menu shows a complete list of your automation folders and subfolders.

To display the general information contained in a folder, simply select the desired item.

To facilitate navigation, you can search your existing folders using the Search by name field, which enables you to search by both number and name.

To view the inactive folders, check deactivated items.

> *Note: Searching by name is performed in the selected folder. To search your entire list of folders, select the InterAction root folder.*

Filtering by folders

The "Filter by folder" checkbox displays only the folders and subfolders of the parent folder selected from the side navigation pane.

6.1.2. Managing the hierarchy of your automation folders

You can move a folder or subfolder within the automation folder tree. From the side navigation pane, select the desired folder then drag and drop it into the target folder.

6.1.3. Creating an automation folder or subfolder

To create a new folder:

1. Select the InterAction root folder.
2. Click on Create then fill in the required fields.

To create a new Sub-folder:

1. Select a target folder.
2. Click on Create then fill in the required fields.

Here are the field details available to create this template:

General information

Field	Description
Active	The default value is YES. Ascertain whether this Folder is active in C2
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and	This field lets you add a description to provide more details about

French description	this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

6.1.4. Modifying an automation folder

To modify an existing automation folder, select it to access the associated details.

You can access the same available fields as when you are creating a new automation folder.

6.2. Managing your processes

In C2 ITSM, a process is defined as one or several actions that are executed sequentially after an entity, such as a ticket, a client, a CI, etc., is saved.

The Management > Automations > Processes menu allows you to manage your processes.

6.2.1. Viewing your processes

The Management > Automations > Processes menu displays all your processes.

All processes are grouped by folder in the side navigation pane and the folder selected by default is the root folder All.

To display the contents of a process, in the root folder "All," select a process from your grid of items. To display the contents of a process in a folder, select a specific folder in the side navigation pane, then select a process from your grid of items.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and name.

To view the inactive items, check the Deactivated items option.

> *Note: Searching by name is performed in the selected folder. To search your entire list of folders, select the All folder.*

6.2.2. Creating a process

To create a new process, select create and fill in the associated field details.

Here are the field details available to create a process:

General information

Refer to the following list for the details of each field and its available options:

Field	Description
Active	The default value is YES. Ascertain whether this Process is active in C2
Folder	This field is required. This field links the process to the desired folder in your list of existing folders.
Target	You must define the entity to which this process applies. The options are Tickets, CIs, Clients, Resources, Enterprises, Emails, Notes or Surveys. The default value is tickets.
Grid	This field links the process to a custom field of the grid type. When you select a field of the grid type, you should also select how the actions should be executed in the Execute the actions field.
Execute the actions	This field is only available if you select to apply this process to a custom field of the grid type. Two options are available: • Once per line: The process actions will be executed on each of the grid lines that meet the execution condition(s) defined in the process. • Once per grid: When the execution conditions defined in the process are met, the process actions will be executed once for the entire grid.
English and French name	This field is required. This field lets you enter the name to identify this item.

	Note: If your C2 environment is monolingual, only the set language is displayed.
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Additional fields according to the target

Field	According to target	Description
Ticket type	Tickets	If the target is a ticket, you can select the ticket type to which the process is applied. If more than one type is possible, you must define it in a condition. *Note: Adding one ticket type enhance the system's performance because the condition will not be assessed if the ticket is not of the type selected.*
Requests	Tickets	If the target is tickets and the process applies to one or several requests, select them in the request section. This improves the performance of the processes.
Including Services	CIs	If the target is CIs, you can perform processes on the services.
Including Knowledge Base	CIs	If the target is CIs, you can perform processes on the knowledge base articles.
Survey	Surveys	If the target is a survey, select to which survey the process applies.

Conditions

Conditions are logical rules that are evaluated sequentially by the system and that precisely locate the items searched.

> *Note: For more details on the conditions and logical operators, please refer to section: 6. APPENDIX A.*

Action(s)

In this section, you can configure the **actions** that your **processes** execute when the **conditions** are met.

You can also use an action template, as explained in section 5.6.2 Create an action template.

Advanced Options

This section defines the advanced options of a process such as **re-execution**, **interval re-execution** and **synchronous mode execution.**

Refer to the following list for the details of each field and its available options:

Field	Description
Re-execution	You can define whether the process should be executed more than once. By default, a process is executed only once, but in some cases, it may be necessary to execute the actions each time the condition is true. *Note: The process only re-executes during each backup; the conditions will be evaluated and, if they are true, the actions will be executed. The condition must be correctly configured so that the actions are executed at the right time, e.g., when a field is being modified. If the condition is not correctly configured, you can become stuck in an infinite loop, e.g., an action that modifies the ticket, causes a backup, and the process begins again.*

Interval	You can set an interval to repeat the action at regular intervals. To do this, set the "Re-execution" option to "Yes", enter a number in the "Interval" field and select a time value, either Minute(s), Hour(s), Day(s), Month(s) or Year(s) from the drop-down menu. Once the interval is set, when the target is saved, if the condition is true, the action will be repeated at the specified interval. If the condition is false or becomes false, no action will be performed and no further execution will take place according to the interval. To resume the re-execution, the target must be saved and the condition must be true.
Run synchronously	Synchronous mode execution automatically applies the fields without having to **refresh** the ticket executed after it is backed up. This mode can affect performance if there are several processes being executed simultaneously. Activating it for several processes is not recommended.

Statistics

There are six statistics in the process manager that can be used to view the time it takes to evaluate a condition and execute the actions. Timers are updated in real time, so you can leave the section open, and the figures will be automatically updated.

> *Note: During process backup, the statistics are reset.*

Events

In the events section, you can view the requests on which the process was executed. You can access the request by clicking on the number.

6.2.3. Modifying a process

To modify the contents of a **process**, you can select a **process** from the **root** folder "All" of the side navigation pane, or select a **process** included in a specific **folder**.

6.3. Managing your mailboxes

In the Management > Automations > Messaging menu, you can configure one or more mailboxes in C2. These mailboxes will be used to create new tickets or to send and receive emails from a ticket or task.

You can configure four types of email servers: Exchange, IMAP, Outlook365, and Gmail.

You can also configure the server used to send automated emails, set up an automation to create tickets when an email is received, and set up a custom tag for each mailbox configured.

When a custom tag is configured for an email server, it can be added to the subject of an email template. A custom tag is generally formed from a prefix followed by: *#ticket/],* where *#ticket* is the ticket number. Note that only the prefix can be modified.

C2 ITSM uses the custom tag to redirect the received email into a ticket or task. However, if the email received does not contain a custom tag, C2 ITSM proceeds to create a new ticket.

> *Note: It is important to note that if the sender's email address is not associated with a client in C2, a new orphan ticket, without a client, will be created. However, you can automate the creation of a new client if their email domain is authorized. For more information, refer to section 2.1 Managing your enterprises.*

6.3.1. Viewing your mailboxes

The Management > Automations > Messaging menu displays all electronic mailboxes configured in your environment.

To display the configuration of an electronic mailbox, simply select the desired mailbox.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and name.

To view the inactive items, check the Deactivated items option.

6.3.2. Configuring a mailbox

To configure a new **mailbox**, select **create** and fill in the associated field details.

> *WARNING: When adding a new mailbox, all emails in the inbox that are linked to the email address will be imported as a new ticket into C2. Using a new email address dedicated to C2 is recommended to avoid this situation.*

Here are the field details available to configure a mailbox:

General information

Refer to the following list for the details of each field and its available options:

Field	Description
Active	The default value is YES. This field defines whether each item is active.
Server type	The default value is OUTLOOK365. In this field, you can choose one of the four types of email servers available: Exchange, IMAP, Outlook365, and Gmail.
Email address	This field is **required**. The email address that will be used to send and receive emails in C2.

6.3.2.1. Configuring an Outlook 365 server

Configuring an Outlook 365 server requires a connection that uses an access token.

To connect the Office Outlook 365 account, select **Get an access token** and connect to your Outlook 365 account.

Before you can do configurations, you must send a request to C2 support to configure your Office365 account in Sherweb's administrative console.

> *Note: You must be the administrator of the email account to do the following:*
>
> *Click on the "Get Access Token" button, and then authenticate with the email account you want to link to C2 ITSM. If the token is accepted, a green checkmark is visible. You can now save the email.*

6.3.2.2. Configuring an Exchange server

Refer to the following list for the details of each field and its available options:

Field	Description
Server address	This field is required. In this field, you can set the Exchange server address the mailbox should use. Cloud: https://outlook.office365.com/EWS/Exchange.asmx Local: https://mondomaine/EWS/Exchange.asmx
Username	This field is required. The username associated with the email address.
Password	Enter the password associated with the email address.
Disallow creation of tickets	This field specifies that this mailbox should not create tickets when an email without a custom tag is received. The mailbox can be used to receive and send emails related to the tickets.
Associated catalog	The associated catalog is not required. However, if you have a request associated with different catalogs, you can set from which catalog the demand is created.
Associated request	You can set the default request for a mailbox. If no request is set, an uncategorized ticket will be created, and a resource must categorize the ticket manually.

Email template	In this field, you can select an email template to be used when a new request is received by email. However, this configuration does not apply to a ticket created in the portal or by a resource. If an email must be sent to the client, regardless of where the ticket comes from, it is preferable to configure sending it in a workflow or in an automated process.
Custom Email Tag	The tag is used to identify your ticket. This way, email exchanges from the ticket to the ticket's client and email responses from the client to C2 ITSM are inside the ticket and remain attached to the ticket.
Add CC as secondary clients	It is possible to assign clients added in CC as secondary clients of the ticket.
Outbound Server	You can define whether an outbound server is required for this mailbox. To configure the settings for the outbound server please refer to the section: 6.3.2.5 Configuring an Outbound server.

6.3.2.3. Configuring an IMAP server

Refer to the following list for the details of each field and its available options:

Field	Description
Server address	This field is required. Your email server address.
Server port	This field is required. Port number is 143 when SSL is not activated or 993 when SSL is activated.
Use SSL	Selecting “Yes” encrypts a communication channel between two computers on the Internet.
Username	The username is identical to the email address entered in the previous field.

Password	The password should be the one linked to your email account.
Disallow creation of new tickets	You can specify that the mailbox does not create tickets when an email without a custom tag is received. The mailbox can be used to receive and send emails related to the tickets.
Associated catalog	The associated catalog is not required. However, if you have a request associated with different catalogs, you can set from which catalog the demand is created.
Associated request	In the Associated request field, you indicate which request is to be automatically created. If no request is selected, the ticket will be created without categorization. A ticket automatically created and not categorized must be manually categorized by a resource.
Email template	In the “Email Template” field, you can select the email template to send as a confirmation of the ticket created via email, or to specify that the email does not accept new tickets. However, if you want this email to also be sent automatically when a ticket is created via the portal or manually by a resource, you must define a process that applies for all ticket creations, regardless of the request origin. In this case, the configuration of the email template is not necessary.
Custom Email Tag	The tag is used to identify your ticket. This way, email exchanges from the ticket to the ticket's client and email responses from the client to C2 ITSM are inside the ticket and remain attached to the ticket.
Adding CC as secondary clients	It is possible to assign clients added in CC as secondary clients of the ticket.
Outbound Server	You can define whether an outbound server is required for this mailbox. To configure the settings for the outbound server please refer to the section: 6.3.2.5 Configuring an Outbound server.

6.3.2.4. Configuring a Gmail server

Configuring a Gmail server requires a connection that uses an access token.

To connect the Gmail account, select **Get an access token** and connect to your Gmail account.

6.3.2.5. Configuring an outbound server

This section allows you to configure the server that automatically sends emails from the application using an Exchange or IMAP server type.

Field	Description
Outbound Server	This field is required. If you want emails to be sent from the configured address, select "Yes."
Server Type	This field is required. Select the server type. You have two (2) options: SMTP or Exchange.
Email address	The email address corresponds to the email address from which the emails are sent.
Server address	You should also configure the server address and the port.
Server port	Port number 143 when SSL is not activated or 993 when SSL is activated.
Use SSL	Selecting "Yes" encrypts a communication channel between two computers on the Internet.
Domain	If you have different domains, you must specify the domain of the email address you registered.
Username	The username is identical to the email address entered in the previous field.
Password	The password should be the one linked to your email account.

6.3.3. Modifying a mailbox

To modify an existing mailbox, select it to access the associated details.

You can access the same available fields as when you are creating a new mailbox.

6.4. Managing your API Call Templates

The Management > Automations > API Call Templates menu lets you create API templates that can be used in a button-type field, a process, workflow action or batch updates.

APIs are often used to exchange information between two systems.

There are three protocols you can use in the C2 application: REST, SOAP and Webhook

Each protocol has its own functionality—commonly referred to as method—to recover or transmit the desired information.

If an API call is used to communicate with a third-party system or software, the latter should be able to accept API calls in JSON format.

6.4.1. Viewing your API calls

The Management > Automations > API calls menu displays all your API call templates.

To display the contents of an API call, simply select the desired item.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and name.

To view the inactive items, check the Deactivated items option.

6.4.2. Configuring an API with the REST protocol

The acronym REST means: Representational State Transfer.

Using the REST protocol requires in-depth knowledge of API content format as well as the methods available or offered by the system, you want to integrate.

The REST protocol calls an API-dedicated URL link with which you can use five methods: POST, GET, PUT, PATCH and DELETE. Therefore, it is important to know how to use these methods in the targeted application, whether it is another system or C2, and to know the authentication mode to use.

Refer to the following list for the details of each field and its available options:

General information

Field	Description
Active	This field defines whether this item is active.
English and French name	In this field, you can name the item.
English and French description	This field is used to provide more details on this item.

Details

Field	Description
Protocol	This field lets you choose from one of three API call protocols: Rest, SOAP and Webhook.
URL	This field registers the URL address of the API you wish to contact.
Method	This field lets you choose one of the five following methods: Get, Post, Put, Patch and Delete.
Authentication	Lets you choose whether you if you want to use an authentication method. The available options are: None, Basic, Bearer and OAuth2. There are additional fields to fill in if you select an authentication type.
Content-Type	By default, this field contains the application/json content.

Associated custom fields

In this section, you can target the field(s) to update with the values you receive from the API used.

Field	Description
Section template	This field lets you select a pre-existing section template from the drop-down list.
Set value of	Lets you choose the field targeted by the API call from the drop-down list.
JSON selector	This field registers the values targeted by the API. For example, Data.Id or Data.Frenchdescription.

6.4.2.1. Setting a Basic authentication type

When the authentication type is set to Basic for an API call using the Rest protocol, you must register the Username and Password for this authentication type in the appropriate fields.

6.4.2.2. Setting a Bearer authentication type

When the authentication type is set to Bearer for an API call using the Rest protocol, you must register the Bearer Token for this authentication type in the appropriate field.

6.4.2.3. Setting an OAuth2 authentication type

When the authentication type is set to OAuth2 for an API call using the Rest protocol, you must configure the following fields using the information provided by your third-party system: Authorization URL, Token URL, Client ID, Client Secret, Scope, Audience.

6.4.3. Configuring an API with the SOAP protocol

The acronym SOAP stands for Simple Object Access Protocol.

This mode requires knowledge of the configurations of one or several SOAP APIs of the third-party system that you wish to integrate.

In particular, an API lets you receive values from a third-party system. You can therefore receive values returned by an API in a field within the application.

For example, if you are using an API and it generates an entry in a third-party system, the API can return an identification number for the new entry to you.

You can then fill in the section "Associated custom fields" to target the field(s) to be updated with the values you receive from the API used.

Refer to the following list for the details of each field and its available options:

General information

Field	Description
Active	This field defines whether this item is active.
English and French name	In this field, you can name the item.
English and French description	This field is used to provide more details on this item.

Details

This section contains fields to be filled in with the information provided by your third-party application.

The available fields are URL, Service, Operation, Username, Password and Request.

Associated custom fields

In this section, you can target the field(s) to update with the values you receive from the API used.

Field	Description
Section template	This field lets you select a pre-existing section template from the drop-down list.
Set the value of	Lets you choose the field targeted by the API call from the drop-down list.
XPath selector	Value obtained through the API.

6.4.4. Configuring an API with the Webhook protocol

The **Webhook** protocol in the menu "**Management > Automations > API Calls**" calls a Webhook in another system using Zapier in C2.

This mode requires knowledge of the configurations of one or several Webhooks in the system that you wish to integrate. Moreover, if the Webhook must execute actions on our solution, it is also important to be knowledgeable about operating the available APIs in our application.

> *Note: For further assistance with this functionality, please contact the C2 support team.*

6.5. Managing your Webhooks

Through the **Management > Automations > Webhooks** menu, you can configure C2 to execute **set actions** when an **event** occurs in a **third-party system** using the **Webhook** protocol, unlike the **API Calls** management menu, which contains the **Webhook** protocol that lets you to do the opposite—send information during an event from C2 to a third-party system.

The third-party system must manage the Webhook notifications, thereby allowing C2 to receive them.

For example, you can configure a Webhook so that C2 performs the action Send a notification to users when certain data is entered in your other third-party system.

> *Note: The Webhook management menu requires knowledge of the configurations of one or several Webhooks of the system that you wish to integrate.*
>
> *Moreover, if the Webhook must execute actions on our solution, it is also important to be knowledgeable about operating the APIs available in our application.*

6.5.1. Viewing your Webhooks

The Management > Automations > Webhooks menu displays all your Webhooks.

To display the contents of a Webhook, simply select the desired item.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and name.

To view the inactive items, check the Deactivated items option.

6.5.2. Configuring a Webhook

To configure a new Webhook, select create and fill in the associated field details.

After the backup, the general information field displays the URL that you must input into your third-party software.

Here are the field details available to create a Webhook:

General information

Refer to the following list for the details of each field and its available options:

Field	Description
Active	The default value is YES. Ascertain whether this Webhook is active in C2.
English and French name	This field is required. This field lets you enter the name to identify this item.

	Note: If your C2 environment is monolingual, only the set language is displayed.
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Filter

Field	Description
JsonPath	This field uses JSON syntax to filter the information to be recovered when the request is being executed. An example of JSON syntax: resource.fields.['System.State']
Expression (RegEx)	This field uses regular JSON expressions to filter the information to be recovered when the request is being executed. An example of a regular JSON expression: Closed

Action(s)

This section configures the **actions** to be executed by your **Webhook** when the **conditions** are met.

You can also use an action template, as explained in section 5.6.2 Create an action template.

6.5.3. Modifying a Webhook

To modify an existing **Webhook**, select it to access the associated details.

You can access the same available fields for modification as when you are creating a new **Webhook**.

7. Managing the CMDB

In C2, the CMDB (configuration management database) offers you an overview of your organization and all of its items. The CMDB lets you manage all your configuration items (CIs) and the relations between them.

CMDB management in C2 is separated into two sections:

- The CMDB Configuration (found in the Management menu)
- The CMDB operation menu (found in the Menu bar)

The Management > CMDB Configuration menu configures the structure of your CMDB; it contains your types, folders, categories, and relations.

The CMDB menu lets you create and manage the CIs to associate them according to your CMDB types. This menu also lets you manage your knowledge base.

7.1. Managing your CMDB types

The Management > CMDB Configuration > Types menu creates CMDB families by grouping them under types, thereby ensuring more targeted CI management.

> *IMPORTANT: C2 requires that at least one CMDB type be active.*

7.1.1. Viewing your CMDB types

The Management > CMDB Configuration > Types menu shows a complete list of your CMDB types.

The types with a checkmark in the system column are included with the application and cannot be modified or deleted.

There are two default CMDB types: Knowledge base and Service. Both are essential to ensuring that certain functions in C2 are in good working order.

To display the contents of a type, simply select the desired item.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and name.

To view the inactive items, check the Deactivated items option.

7.1.2. Creating a CMDB type

To create a new **type**, select **create** and fill in the associated field details.

Here are the details of the fields available to create a type:

General information

Field	Description
Icon	This field is required. In this field, you can select an icon from the image bank provided by the system.
Active	This field is required. Through this field, you can check whether this CMDB type is available for users.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

7.1.3. Modifying a CMDB type

To modify an existing **CMDB type**, select it to access the associated details.

You can access the same available fields as when you are creating a new **CMDB type**.

> *Note: The types with a checkmark in the system column are included with the application and cannot be modified or deleted.*

7.2. Managing your CMDB folders

Through the Management > CMDB Configuration > Folders menu, you can manage the inventory database by grouping the CIs into different folders. You can create as many folders and subfolders as you need.

When you create a new folder, you must associate it with a type. You can also associate it with a parent folder, if necessary.

You can secure your folders so that only certain security groups can access them.

7.2.1. Viewing your CMDB folders

The Management > CMDB Configuration > Folders menu shows a complete list of your CMDB folders.

The folders with a checkmark in the system column are included with the application and cannot be modified or deleted.

The folders with a checkmark in the secure column have security configurations associated with specific groups.

To display the contents of a folder, simply select the desired item.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and name.

To view the inactive items, check the Deactivated items option.

Filtering by folders

The Filter by folder checkbox displays only the folders and subfolders of the type or parent folder selected from the type tree.

7.2.2. Managing the hierarchy of your CMDB folders

You can manage the hierarchy between your CMDB folders by managing the Parent-Child relation between them.

There are two ways to associate a folder with another **parent** folder:

- You can modify the **child** folder and select the parent folder from the drop-down list in the **Parent** field.
- From the side navigation pane, select the desired folder then **drag and drop** it into the target folder, which becomes the **parent**.

> *Note: You can only create a folder hierarchy within the same CMDB type; if you wish to move a folder under another CMDB type, you must modify the folder and choose the desired type from the drop-down list in the Type field.*

7.2.3. Creating a CMDB folder

To create a new **folder**, select **create** and fill in the associated field details.

Here are the field details available to create a folder:

General information

Field	Description
Active	This field is **required**. Through this field, you can check whether this CMDB **folder** is available for users.
Type	This field is **required**. Through this field, you can link with the desired CMDB type.
Parent	This field allows you to associate this folder as a child folder to another existing parent folder in the same CMDB type.
English and French name	This field is **required**. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Security

This field allows you to select the folder's visibility based on one or several desired groups.

For example, if a user does not belong to a group assigned to this folder, they are not able to view the CIs in the folder. However, they are always able to assign one or more CIs in this folder to a ticket.

The **read-only** checkmark on a group grants a group access to this item but not access to modify the item.

7.2.4. Modifying a CMDB folder

To modify an existing **CMDB folder**, select it to access the associated details.

You can access the same available fields as when you are creating a new **CMDB folder**
.

Note: The folders with a checkmark in the system column are included with the application and the default fields cannot be modified or deleted.

7.3. Managing your CMDB categories

This section creates CMDB **categories** to which you can associate your various CIs.

Two system categories are available **by default: Knowledge base** and **Service**. You cannot deactivate them; however, you can add custom attributes (fields).

1. In the **Knowledge base** category, you can add the fields you wish to include in the knowledge base articles.
2. In the **Service** category, you can add information you wish to include in your services. For example, you can add a schedule field to specify the different

opening hours per service.

Important: when you add different hours for a service, they will be taken into account when calculating the ticket's response and resolution time.

Each category can contain an unlimited number of attributes (custom fields). You can specify the information you need for your CIs. When you create your CIs and select a category, you can enter the required information for this category.

You can also manage security for the categories. You can assign one or several security groups to the categories.

If a user is not part of the group assigned to the category, they cannot view the details of a CI, but can still assign it to a ticket.

7.3.1. Viewing your CMDB categories

The **Categories (CMBD)** tab shows a complete list of your CMDB categories.

The categories with a checkmark in the **system** column are included with the application and the default information cannot be modified or deleted.

The categories with a checkmark in the **secured** column have security configurations associated with specific groups.

To display the contents of a category, simply select the desired item.

To facilitate navigation, you can search your existing items using the **Search by name** field, which enables you to search by both number and name.

To view the inactive items, check the **Deactivated items** option.

7.3.2. Creating a CMDB category

To create a new category, select create and fill in the associated field details.

Here are the field details available to create a category:

General information

Field	Description
Active	This field is required. Through this field, you can check whether this item is available for users.
Type	This field is required. Through this field, you can link with the desired CMDB type.
Prefix	This field is used to enter a prefix that will be automatically placed in front of the numbers of the CIs associated to this category. For example: The CIs associated to a category named application with the prefix APP, displays the prefix in front of their numbers: APP00000001, APP00000002, APP00000003, etc.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Adding sections

The **Add Section** button is used to add information to the category as sections and custom fields.

For each field section, you have access to the following parameters:

Field	Description
English and French name	The French and English names serve as section headers in the request.
Section visible on condition	This option allows you to select a condition to make the section visible.
Line with field	When you add a section, you can set the number of columns displayed on screen from one to four and insert custom fields.

Associated CIs

This section displays the list of CIs associated to this category.

Security

This field is used to select the category's visibility based on one or several desired groups.

For example, if a user is not part of the group assigned to the category, they cannot view the details of a CI, but are still able to assign it to a ticket.

The **read-only** checkmark on a group grants the group access to this item. However, the group is not able to modify it.

7.3.3. Modifying a CMDB category

To modify an existing CMDB category, select it to access the associated details.

You can access the same available fields as when you are creating a new CMDB category, except for the Prefix field, which cannot be modified.

> *Note: The categories with a checkmark in the system column are included with the application and the default fields cannot be modified or deleted. However, you can add more information sections.*

7.4. Managing your CMDB relations

This section allows you to associate a relation name between two of your CMDB categories and display it in the CIs relations interface. Adding a relation name to a CI, allows you to see the interactions and interdependencies of this CI on another more easily.

For example, you can define the relation names Contains and Is connected to define the relation between computer hardware and software, as well as the connected printers.

- Computer > Contains > Software
- Computer > Is connected > Printers

In this case, a CI belonging to the computer category to which another CI in the software category is assigned displays the relation's name "Contains" in this CI's relation interface.

> *Note: To manage your relations, create at least one relation name in the CMDB Relation list items. For more information, please refer to section 4.2 Managing your list items.*

7.4.1. Viewing your relations between CMDB categories

The Relations (CMBD) tab shows a complete list of your relations between CMDB categories.

To display the contents of a relation, simply select the desired item.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and name.

To view the inactive items, check the Deactivated items option.

7.4.2. Creating a relation between CMDB categories

Each relation combination is unique. You cannot configure the same relation combination between categories more than once.

For example, if a relation in the server category has the relation's name Assign in the Computer category, you cannot assign a second relation name, such as Impact between the Server category and the computer category.

From Category -> Relation name -> To Category

- Server -> Assign -> Computer
- Server -> Impact -> Computer = Cannot be applied because the Server category already has the relation's name Assign to the Computer category.

Here are the field details available to create a category:

General information

Field	Description
Active	This field is required. Through this field, you can check whether this item is available for users.
From category	This field is required. This field is used to choose the first relation item from your CMDB categories.
Relation name	This field is required. This field is used to choose a relation name between the categories from your list of CMDB relations. To modify the list of available items, refer to section 4.2 Managing your list items. *Note: The relation's name is limited to 30 characters visible below the image.*
To category	This field is required. This field is used to choose the destination relation item from your CMDB categories.

7.4.3. Modifying a CMDB relation

To modify an existing **CMDB relation**, select it to access the associated details.

You can access the same available fields as when you are creating a new **CMDB relation**.

7.5. Managing your configuration items (CIs)

In C2, your **configuration items (CIs)** are found within the **CMDB** menu.

This menu allows you to manage your CIs within the CMDB structure you set in place in the **CMDB Configuration** menu.

7.5.1. Viewing your CIs

To access your CIs, open the CMDB Menu and select one of the CMDB types you have available, this opens in a new tab.

To display the content of a specific **CI**, you must select the associated number or double click on the desired item. The form opens in a new tab.

To facilitate navigation, you can perform searches in various ways, using the **Search by text** field either in **quick** or **complete** mode.

The **quick** search performs a search in the CI's **number** and **name** fields, whereas the **complete** search, searches all fields, including custom fields.

You can also choose to search by **Client** or by **Enterprise**.

To view the inactive items, check the **Deactivated items** option.

Modifying the grid display

You can modify the column display to add or remove items from the grid or use grid templates.

To modify the display grid, you must select the **Modify columns** button. An arrow button appears on the columns enabling you to add or remove columns or elements.

To use a grid template, you must select the **Grids (templates)** button and select the desired template. This menu also allows you to reset the grid to its default display by selecting **Return to initial configuration of the grid**.

> *Note: To manage the available grid templates, these must be preconfigured via the management menus. For more information, refer to section 5.5 Managing your grid templates.*

Filtering Your Cis

To narrow your search and reduce the number of items displayed in the grid, you can select the folder, category, and filters.

To apply a filter, you must select the desired one from the filter section.

To remove an active filter, you must either select another filter or the **None** filter.

> *Note: To manage the available filters, these must be preconfigured via the management menus. For more information, refer to section 5.3 Managing your filter templates.*

CI relations

The Show Relations button opens the **CI relation** tab and lets you view the selected CI's relations with other CIs. The CI's **relations** are based on the CIs that are **assigned** to it, this can be found in the Impacted CIs and Dependent CIs fields of the CI.

The relations themselves can also have "relation names" if they have been configured. For more details on relation names, refer to section 7.4 Managing your CMDB relations.

7.5.2. Creating a CI

To create a new **CI**, select **create** and fill in the associated field details.

Here are the details of the fields available to create a CI:

General information

Field	Description
Active	This field is required. Through this field, you can check whether this item is available for users.
Number	This field is required. The CI number can be generated automatically or assigned manually. To assign a number manually, you must have security group rights.
Type	The type is automatically selected.
State	This field can be useful in managing your CIs. It refers to the list CI states which allows you to include additional list items to build your list of states according to your needs. For example, in repair, donated, recycled, sold, in production, etc. *Note: For more details on list items, please refer to the section: 4.2 Managing your list items.*
Owner	This field is used to enter an owner for this CI. The notion of ownership designates the person responsible for the CI or the resource who creates it. This field is of the autocomplete type and searches through all clients.
Folder	When you create a CI, select a folder.
Category	When you create a CI, select a category. The information to be entered depends on the category selected and the relevant fields appear in the Additional Information section. *Note: If you wish to change the CI category, use the button Enable conversion, because each category can have its own fields (attributes).*

English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
Tags	You can enter several keywords to facilitate or narrow your search.

Related Clients

This section associates one or several clients with the CI. The related client is different from the owner. This section serves to specify the CI user and to quickly see the clients related with the CI, for example a computer that belongs to an employee.

Related enterprises

This section specifies an enterprise for the CI.

For example: Your enterprises define your various establishments, sectors, and departments. By associating an enterprise with one or several CIs, you can know where to find the hardware. You can also set up more generic associations (such as a printer in a corridor used by several users or a server, etc.).

Impacted CIs

This section allows you to associate one or more CIs that are affected by the operation of the CI you are currently configuring.

For example, a server with configured printers. In the case of a server shutdown, you can quickly see that the impact of the shutdown of this server affects the operation of some printers.
If you click on the Show relations button, you can graphically display the relations between the CIs.

Dependent CIs

In this section, you can indicate the CI(s) that depend on the CI you are configuring.

For example, a laptop depends on the operating system installed on it.

Attachments

In this section, you can attach relevant documents to the CI. You can attach documents in all existing formats. You can also view all the existing documents attached to a CI. To add an attached file, you must press the Browse button and select the desired file from the file explorer window.

7.5.3. Creating a CI from a copy

You can create a copy of an existing CI to use the configurations already present as a basis for creating a new CI.

You must access the desired CI by double clicking on or selecting the CI number. On the CI form, you must then click on Copy. A copy of the CI will be generated containing all configurations present in the field details.

7.5.4. Modifying a CI

To modify an existing CI, select the number or double click on the desired CI; the CI form opens in a new tab.

You now have access to modify all fields available when a CI is created, as well as new sections:

- Related tickets
- Banked hours
- Reservations
- Activities

Here are the details for each of the new sections:

Related tickets

This section allows you to see from the CI, the tickets associated to it. You can therefore view the history of open or closed tickets in which the CI is associated. You can also filter the list of tickets by pressing the “Open tickets” and “Closed tickets” toggle buttons.

Banked Hours

You can view all the time banks linked to this CI. You can also create a new time bank by clicking on the add button or modify an existing bank by clicking on its ID number.

This section is only visible when you modify a CI. When creating a new CI, you must first save the CI to make this view available.

Reservations

To have information in this section, you must first create a reservation type custom field, add it to a request and create at least one ticket in which you reserve the CI.

In this section, you can view the CI reservation calendar.

For example, projectors can be reserved and used throughout your organization. This section makes it easy to view the time slots where a projector has already been reserved. You can also identify the ticket that contains the reservation by means of a number indicated in the white box.

Activities

The **Activities** section lets you follow the changes made to this CI. Actions are identified by the date and time, which user made the change and the type of change. By clicking on the activity, you can see the details of the change(s).

7.5.4.1. Modifying the CI number manually

To modify a CI number in alphanumeric mode, go to **Management > Groups** and, in the **Application security > CIs** section, check the **Set number** box.

This change applies to the CI form.

You can then see the **Number** field and change it manually.

7.5.5. Exporting your CIs

There are two ways for you to export the list of your CIs in CSV format:

1. **Report format:** exports grid content and is formatted depending on which regional format has been set in the **Profile > My options > Other preferences** menu.
2. **Import format:** uses C2's import template. This allows you to make changes in

batches and import them later through the import menu.

> *Note: For optimal exports, you must select the same regional export format as the language used in your Microsoft Excel software. To modify the export format, you must go to the menu: Profile > My Options > Other Preferences > General Layout.*

8. Managing the knowledge base

In C2, you can use the knowledge base to save CIs as knowledge articles, which can then be used for reference purposes or when resources are processing tickets.

Knowledge base articles may contain text, images, and attachments.

To access your knowledge base, select the CMDB menu and then select the Knowledge base CMDB type.

8.1. Managing the knowledge base structure

To manage your knowledge base structure, you can create categories, as well as folders to which your articles will be associated.

For further details on creating folders and categories for your knowledge base, refer to section 7. Managing the CMDB.

8.2. Managing knowledge base articles

In C2, your knowledge base article CIs can be found in the CMDB: Knowledge base menu.

This menu allows you to manage your knowledge base articles within the CMDB structure you set in place in the CMDB Configuration menu.

8.2.1. Viewing your articles

To access your knowledge base articles, open the CMDB Menu and select one of the Knowledge Base you have available, this opens in a new tab.

To display the content of a specific knowledge article, you must select the associated number or double click on the desired item. The form opens in a new tab.

To facilitate navigation, you can perform searches in various ways, using the Search by text field in quick or full mode, or searching by clients or enterprise.

The **quick** search performs a search in the **number**, **name**, and **keyword** fields, whereas the **full** search, searches all fields, including custom ones.

To view the inactive items, check the **Deactivated items** option.

Modifying the grid display

You can modify the column display to add or remove items from the grid or use table templates.

To modify the display grid, you must select the **Modify columns** button. An arrow button appears on the columns enabling you to add or remove columns of elements.

To use a grid template, you must select the **Grids (templates)** button and select the desired template. This menu also allows you to reset the grid to its default display by selecting **Return to initial configuration of the grid.**

> *Note: To manage the available grid templates, these must be preconfigured via the management menus. For more information, refer to section 5.5 Managing your grid templates.*

Filtering your knowledge base articles

To narrow your search and reduce the number of items displayed in the grid, you can select the folder, category, and filters.

To apply a filter, you must select the desired one from the filter section.
To remove an active filter, you must either select another filter or the **None** filter.

> *Note: To manage the available filters, these must be preconfigured via the management menus. For more information, refer to section 5.3 Managing your filter templates.*

Knowledge article relations

The Show Relations button opens the **Knowledge article relation** tab and lets you view the selected CI's relations with other CIs. The CI's **relations** are based on the CIs that are **assigned** to it, this can be found in the Impacted CIs and Dependent CIs fields of the CI.

The relations themselves can also have "relation names" if they have been configured. For more details on relation names, refer to section 7.4 Managing your CMDB relations.

8.2.2. Creating a new article

To create a new knowledge base article, select **create** and fill in the associated field details.

Here are the details of the fields available to create a new item:

General information

Field	Description
Active	This field is **required.** Through this field, you can check whether this item is available for users.
Number	This field is **required.** The CI number can be generated automatically or assigned manually. To assign a number manually, you must have security group rights.
Type	The type is automatically selected.
Availability	This field is particularly important because it is where you can change the status of the article from **Public** to **Private.** • The **public** status grants **client's** access to the article through the client portal. • The **private** status only grants access to internal resources. If the article has a "**Waiting for approval**" status, this means that a member of your team must **approve** its content by changing its availability so that the rest of the users can access it.
State	The State of a knowledge base article does not impact its accessibility. Its state can be used in various processes.
Owner	In each of the articles, you can indicate its owner. The notion of ownership designates the person responsible for the article or

	the resource who created it. This field is of the autocomplete type and searches through all clients.
Folder	This field is **required**. When you create an article, you must select a folder.
Category	This field is **required**. When you create an article, you must select a category. The information to be entered depends on the category selected. *Note: If you wish to change the article category, use the button Enable conversion, because each category can have its own fields (attributes).*
English and French names	This field is **required**. This field lets you enter the name to identify this item. The name is displayed in the knowledge base, as well as on the **portal** if the availability is set to **public**. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
Tags	You can enter several keywords to facilitate or narrow your search.

Services

In this section, you can associate services to your knowledge base articles. This association allows you to view the number of articles associated to this service on the portal's service tiles.

Consultations

In this section, you can see the number of times a knowledge base article has been viewed, as well as the history of the users who viewed it. To access this section users must have the necessary permissions in their group security.

Related clients

This section is not useful for managing knowledge base articles.

Related enterprises

You can associate one or more enterprises with your knowledge article to restrict access to the portal to clients associated with these enterprises. By default, no enterprise is associated, which allows clients from all enterprises to access the knowledge article if the article is public.

> *Note: The following message is displayed "You do not have the required permission to access this knowledge base article" when clients outside the enterprises listed in this section attempt to access the knowledge article.*

Impacted CIs

This section is not useful for managing knowledge base articles.

Dependent CIs

This section is not useful for managing knowledge base articles.

Attachments

In this section, you can attach any documents pertaining to your article. You can attach documents in all existing formats. To attach a file, you must press the Browse button and select the desired file from the file explorer window.

Banked Hours

This section is not useful for managing knowledge base articles.

Subscriptions

In this section, you can view the users that are subscribed to the knowledge base articles. To access this section users must have the necessary permissions in their group security.

8.2.2.1. Creating an article via a request

In C2, you can create a new knowledge base article in the ticket resolution section.

To create a new knowledge base article via a ticket, add tags in the appropriate field in the resolution section and save the ticket.

The information in the technical resolution field will then be transferred to the knowledge base article.

When a new knowledge base article is created via a ticket resolution, the article's availability status is waiting for approval. This guarantees that the article is validated by a user with the access rights required to revise it before making it public.

> *Note: With this option, you can offer your resources a way to add new entries to the knowledge base when processing tickets.*

8.2.3. Modifying an article

To modify an existing article, select the number or double click on the desired article. The article form opens in a new tab.

You now have access to modify the fields available when a knowledge base article is being created, and you can access new sections:

- Related tickets
- Banked hours
- Reservations
- Activities

Here are the details for each of the new sections:

Related tickets

This section is not useful for managing knowledge base articles.

Tickets with no associated articles in the resolution section will not be displayed. Searching for an article through a ticket is supported, however, the opposite is not possible.

> *Note: You can automatically create an article via a ticket resolution.*

Banked hours

This section is not useful for managing knowledge base articles.

Reservations

This section is not useful for managing knowledge base articles.

Activities

The Activities section lets you follow the changes made to this article. Actions are identified by the date and time, which user made the change and the type of change. By clicking on the activity, you can see the details of the change(s).

8.2.4. Exporting your list of articles

You can export the list of your articles in CSV format.

You have two export options:

1. Report Format: exports grid content and is formatted depending on which regional format has been set in the Profile > My options > Other preferences menu.
2. Import Format: uses C2's import template, which makes batch data changes and imports them later through the import menu.

> *Note: For optimal exports, you must select the same export format as the language used in your Microsoft Excel software. To modify the export format, you must go to the menu: Profile > My Options > My Preferences > General Parameters.*

9. Managing advanced settings

The advanced settings management menu in C2 has a host of configuration parameters for managing your C2 instance.

This section contains the details on each of the parameters available.

9.1. Managing priorities

In C2, priorities are used in requests to determine their level of urgency based on their impact. This helps determine the response time and the desired resolution time.

The Management > Advanced Settings > Priorities menu sets the priorities to be applied, by default, to all requests.

> *Note: You can also set a different priority for each of your requests by modifying the request itself. For more information, refer to section* 3.4 Managing your requests.

9.1.1. Setting priorities

In this section, you can set a name for each of your priorities that are visible in the requests.

It is here also that you can determine the response time and the desired resolution time for each of your priorities. The response and resolution times can be configured in minutes, hours, or days.

For example, you could determine that priority 1 is P1 and it has a response time of 60 minutes and a resolution time of 120 minutes.

9.1.2. Managing priority matrices

Priorities are assessed based on the Impact and Urgency fields, which are found within the requests.

This section sets up a priority matrix to associate the desired priority level, depending on the impact and urgency, with the five types of requests available in C2.

To manage the list items in the matrix, you must configure the list items from the impact and urgency lists. For more information, refer to section 4.2 Managing your list items.

Here is an example of a priority matrix:

	URGENCY		
IMPACT	Does not work	Workaround solution	May work
1 to 5 users	Priority 1	Priority 2	Priority 5
Service, department or more than five users	Priority 1	Priority 2	Priority 4
The entire organization	Priority 1	Priority 2	Priority 3

Note: Users cannot modify the priority field in a request directly; the priority will be determined based on the impact, urgency and client role configured in your priority matrices.

9.1.3. Priority modifiers

In this section, you can configure a **priority modifier** to **increase** the priority depending on the **client's role**. For example, a request coming from a vice-president can be considered more urgent than one coming from an employee.

The modifiers apply an increase of **0 to 4**; a modifier set to 0 does not change the priority based on the client's role, whereas a modifier set to between 1 and 4 increases the priority level accordingly.

For example, a **request** whose **impact** and **urgency** generate a priority **level** of **3** based on your priority matrix can also modify its priorities depending on the client's role:

- An employee client role with a modifier set to 0 keeps the priority level at 3.
- A vice-president client role with a modifier set to 2 obtains a priority level of 1.

The list of **roles** can be modified via the **list items**. For more information, refer to section 4.2 Managing your list items.

9.2. Managing public holidays

The **Management > Advanced Settings > Public Holidays** menu is used to record the year's **public holidays** for your organization. Public holidays serve to **calculate** the **impact** on your **SLAs.**

To avoid conflicts in your request history, use a new public holiday entry for each year, for example:

- 2020-01-01 – New Year's Day
- 2021-01-01 – New Year's Day
- 2022-01-01 – New Year's Day

> *Note: You cannot configure different public holidays by enterprise. For example, public holidays cannot target a particular region; if the day is considered a public holiday in the system, SLAs will be affected for all requests whether the day really is a public holiday for the resource processing them. The opposite also applies.*

9.2.1. Viewing your public holidays

The **Public holidays** tab displays the entire grid of items.

To display the contents of a **public holiday**, simply **select** the desired item.

To facilitate navigation, you can search your existing items using the **Search by name** field, which enables you to search by both number and name.

To view the inactive items, check the **Deactivated items** option.

9.2.2. Creating a public holiday entry

To create a new public holiday entry, select **create** and fill in the associated field details.

Here are the details of the fields available to create a new item:

General information

Field	Description
Active	This field is required. Through this field, you can check whether this item is available for users.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Public holidays

Use the calendar to enter or select the desired date for the public holiday.

9.2.3. Modifying a public holiday entry

To modify an existing public holiday entry, select the desired item to access the details.

You can access the same available fields as when you are creating a new public holiday.

9.3. Managing your messages

The Management > Advanced Settings > Messages menu manages the banner messages that are displayed at the top of the application or portal for your users.

To display a message, you must create a new message or modify an existing one.

9.3.1. Viewing your messages

The **Management** > **Advanced Settings** > **Messages** tab displays the entire grid of items.

To display the contents of a **message**, simply **select** the desired item.

To facilitate navigation, you can search your existing items using the **Search by name** field, which enables you to search by both number and name.

To view the inactive items, check the **Deactivated items** option.

9.3.2. Creating a new message

To create a new **message**, select **create** and fill in the associated field details.

Here are the details of the fields available to create this item:

General information

Field	Description
Active	The default value is **YES**. This field defines whether the item is active.
English and French name	This field is **required**. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Body of the message

Field	Description
Type	In this field, you can choose the desired message type, e.g., warning or information. Depending on your selection, the message is then displayed with the color previously defined in the list items. *Note: You can create new message types or modify existing ones via the list elements. For more information, refer to section 4.2 Managing your list items.*
Display mode	In this field, you can select the display mode: in the portal, in the application or in both interfaces.
Message in English and French	This field is where you enter the body of the message. The message is displayed based on the user language. The field is in text format and supports HTML formatting to add color, bold or a hyperlink.
Begin date	This field is used to choose the date and time at which the message starts displaying. This field is not required; if you do not enter a date, the message will be displayed immediately and until you deactivate it.
End date	This field is used to choose the date and time at which the message stops displaying. This field is not required; if you do not enter a date, the message will be displayed until you deactivate it.
Locked (cannot be hidden)	Through this field, you can choose whether the message can be hidden. If the Locked field is set to "no," the user can simply click on the message to hide it. If the message is still active when you next connect, it will be displayed again.

Related enterprises (Portal)

In this section, you can limit the display of this message to specific associated enterprises. This field is only available when the display mode is set to Portal or Portal and Application.

Related groups (Application)

In this section, you can limit the display of this message to specific associated groups. This field is only available when the display mode is set to Application or Portal and Application.

9.3.3. Modifying a message

To modify an existing message, select the desired item to access the details.

You can access the same available fields as when you are creating a new message.

9.4. Managing imports

The Management > Advanced Settings > Imports menu is used to import your clients, CIs, enterprises, tickets, and tasks into the application through ODBC connectors or CSV files.

9.4.1. Importing data through an ODBC connector

To import data through an ODBC connector, you must configure the XML script for import in the advanced settings. For more information, refer to section 9.10.16 Import configuration.

Import type: When the ODBC import is configured, you can select the type of import: clients, CIs, enterprises, tickets, or tasks.

Validate: The Validate button is used to validate the import format and certain data, e.g., list elements. If there are errors, an error report can be downloaded. The number of items created, updated, or left unchanged will be displayed on your screen.

Import: The Import button validates the data before importing it. If there are errors, an error report can be downloaded. The number of items created, updated, or left unchanged will be displayed on your screen.

> *Note: If the import XML script is not configured, this section is not visible in the Imports management menu.*

9.4.2. Importing data through a CSV file

In the section, **Comma Separated Values (.CSV)**, you can import data through CSV files.

Here are the available configurations to import data through a CSV file:

Field	Description
Search type	This field is used for list elements and to specify whether the import file contains the list element's **text** or its **sequence** number. *Note: we recommend text mode to facilitate imports.*
Search language	If the search type is **text**, you must specify whether the text is in French or in English.
Actions for multiple values	Some fields accept several values, such as the client's enterprise. This configuration serves to specify whether the value of the file should be **added** or if it should **replace** the value in the database.
Ignore lines with errors	This field determines how each import behave if it encounters errors. If the value is **yes**, the import will be completed in its entirety, and an error report will be displayed afterwards containing the lines that were not imported. If the value is **no**, the import ceases as soon as an error is found.
File Culture	In this field, you can indicate the language of the Excel software that generates the CSV file because the file's formulas and separators differ from one language to the next.

	Note: For example, if your version of Excel is in English, you must indicate en-US in the file culture field.
Field Delimiter	In this field, you can enter the delimiter to use in the import template. *Note: Normally, the delimiter is "," for files generated with the English version of Excel, and ";" for files generated with the French version of Excel.*
Delimiter for multiple values	Some fields keep multiple values such as the client's enterprise; you must set the character that separates the values. *Note: Normally, the character "|" is used because it is not a standard character and is rarely used with data.*
Send activation emails	This option is where you choose whether you send an activation email to newly created clients. The activation email is sent to the clients who have access to the portal so that they can set up their password. If your users must connect with Azure, we strongly recommend that you do not send the email. If you enter No, the usernames and passwords must be in the import file. *Note: If there is a "\" in the username, the activation email will not be sent.*
Normalize Data	This normalizes the data to avoid creating duplicates or having typing errors in the list elements. To configure data normalization, refer to section 9.10 Managing data normalization.

9.4.2.1. Downloading an import template

To facilitate imports, templates are available for each of the import types: clients, CIs, enterprises, tickets, and tasks.

To download the right template, select the Download Template button in the same line as the desired import type.

9.4.2.2. Validating your import file

Once the import file is ready, proceeding with the validation is recommended. To do so, click on the Validate button.

If errors arise during validation, an error message is displayed indicating the number of errors detected, and a validation log is automatically created. You can view the log using the "Download the error report" button.

If there are no errors, you can start the import.

9.4.2.3. Importing data

To import your data, click on the Import button and select your source file from the file explorer window.

The file for import must always be a CSV file and be saved beforehand in UTF-8 format.

After import, the Results section displays the import results, and a processing log is automatically created. You can view the log using the "Download the error report" button.

9.5. Managing ticket types

The Management > Advanced Settings > Ticket Types menu is used to configure the system fields as needed for each ticket type. When you select a ticket type, you can modify the system information in the ticket.

Here are the details of the fields available to modify the ticket type:

Ticket name

Field	Description
Actual response date status	In this field, you can set the actual response date status per the Service Level Agreement (SLA). For example, you can set a processing start date that is calculated when the classification status is selected.
Actual resolution date status	In this field, you can set the resolution date status per the Service Level Agreement (SLA).
Auto-generate ticket Summary	This field is used to select whether the summary will be generated automatically using the name of the request.

Configuring the ticket fields

This section allows you to select which system sections to display in your ticket from the drop-down menu. You can also configure each of the fields by pressing the pencil icon and choose whether they should be read-only, required or conditionally required.

> *Note: Some fields are required by default and cannot be modified, e.g., clients, group, and resources.*

9.6. Managing variables

The **Management > Advanced Settings > Variables** menu creates variables or constants to use within the application.

These variables can be used in searches, making it possible to search for a keyword on several target fields, and they can serve as constants to compare values or be displayed in an email or print template.

You must first have a **custom field** for your variable. You can use an existing field or create a new one for this variable. For more details on how to create a custom field, please refer to section: 4.4 Managing your custom fields.

For example, you can create a search variable based on a text field. This variable can be used in the search window for different words without having to reenter every word possible.

In the search window or a search template, you can then use the variable without constantly having to enter different information.

By using the search variable, you must enter one word rather than search through the application.

9.6.1. Viewing your variables

The **Management > Advanced Settings > Variables** tab displays the entire grid of items.

To display the contents of a **variable**, you must **select** the desired item.

To facilitate navigation, you can search your existing items using the **Search by name** field, which enables you to search by both number and name.

To view the inactive items, check the **Deactivated items** option.

9.6.2. Creating a new variable

To create a new **variable**, select **create** and fill in the associated field details.

Here are the details of the fields available to create this item:

General information

Field	Description
Active	The default value is YES. Through this field, you can check whether this **variable** is available for users.
English and French Name	This field is **required**. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Variable

Field	Description
Tag	Allow you to uniquely identify this field by a keyword to recognize it in a search, a configuration or when using a tag. The identifier can only include letters, numbers, or underscores and has a 64-character limit.
Custom Field	This field is required. In this field, you can select a custom field from the drop menu on which to apply your variable. *Note: You must first have a custom field for your variable. You can use an existing field or create a new one for this variable.*
Value	In this field, you can enter a default value for this variable. *Note: You can leave this field blank to use the variable function as a free text field in your searches.*

9.6.3. Modifying a variable

To modify an existing **variable**, select the desired item to access the details.

You can access the same available fields as when you are creating a new **variable** except for **custom field**, which cannot be modified.

9.7. Managing your views

The Management > Advanced Settings > Views menu allows you to create and manage your shared views on the portal.

This option allows you to create a Kanban representation of tickets according to a defined filter and grouping. The view is accessible to the portal via a custom URL and is read-only. Views allow users accessing them to view information and details of the tickets associated with them and, if enabled, to add a bookmark to the tickets.

9.7.1. Viewing your views

The **Management > Advanced Settings > Views** tab displays the entire grid of items.

To display the contents of a **view**, you must **select** the desired item.

To facilitate navigation, you can search your existing items using the **Search by name** field, which enables you to search by both number and name.

To view the inactive items, check the **Deactivated items** option.

9.7.2. Creating a new view

To create a new **view**, select **create** and fill in the associated field details.

Here are the details of the fields available to create this item:

General information

Field	Description
Active	The default value is YES. Through this field, you can check whether this variable is available for users.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Details

Field	Description
Address	This field is required. The information you enter in this field is added to the end of the view's URL. For example, if the address field contains the word test, the URL address to access this view is: https://c2itsm.com/portal#/portalview/test
Ticket Filter	This field is required. In this field, you can select a filter whose target is tickets. You must have at least one existing filter to create a new view. For more information on creating a ticket filter, refer to section 5.3 Managing your filter templates.
Group by	This field is required. In this field, you can define the grouping used to display the tickets.
Show favorites	This field displays lets you choose if you want to display the favorites icon on the tickets.
Can Select Favorites	If the option display favorites is set to yes, this field can be used to select whether to offer users the possibility of activating or deactivating the favorite status on the tickets.

9.7.3. Modifying a view

To modify an existing view, select the desired item to access the details.

You can access the same available fields as when you are creating a new view.

9.8. Managing your events

The Management > Advanced Settings > Events menu displays a log containing C2 events.

There are three types of events: Application, Integration and Security.

9.8.1. Viewing your events

The Management > Advanced Settings > Events Logs tab displays your events according to the desired type: Application, Integration and Security.

To display your events, you must first choose an event type, if some events are present, they will be displayed. You can then apply additional filters to narrow your searches.

You can apply keyword, start date, and end date filters. You can also remove active filters by clicking on the Clear Filters button.

> *Note: You can also apply a level filter for the Application event type.*

To display the details of an event, simply select the desired item and the details section displays the information.

9.8.2. Exporting your events

You can export your event results in CSV format using the "Export To CSV" button.

9.9. Managing data normalization

The Management > Advanced Settings > Data Normalization menu uses a data normalization function to avoid creating duplicates when importing data and entering CIs manually.

Data normalization normalizes the information received during the import.

It also replaces values during import. It can be applied to all entities: CI, Client, Enterprise, and Ticket. Data normalization is available for CSV and ODBC imports.

For example, you wish to normalize data entry for the “computer” value when importing CIs. However, your source file to import the “computer” value contains several different values to represent a computer, such as “PC, office computer, computer.”

By applying the configurations required for data normalization, C2 can replace the values “PC, office computer, computer” with a single value, “computer,” during import.

9.9.1. Viewing your normalized data

The Management > Advanced Settings > Data Normalization tab displays the entire grid of items.

To display the contents of a data normalization, simply select the desired item.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and name. You can then apply a filter by target to narrow your searches.

To view the inactive items, check the Deactivated items option.

9.9.2. Creating a data normalization

To create a new data normalization, select create and fill in the associated field details.

Here are the details of the fields available to create this item:

General information

Field	Description
Active	The default value is YES. Through this field, you can check whether this variable is available for users.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*
Target	This field is required. In this field, you can select the target whose data is to be normalized; the available targets are: Ticket, CI, Client, and Enterprise.
Field	This field is required. In this field, you can select the field whose data is to be normalized. You can choose between system fields and custom fields. The types of fields that can be normalized are text, memo, and list.
Language	This field allows you to select the language in which the selected field should be normalized.

Normalized value	You must click on the plus button to add at least one value to normalize. This is the field where you enter the value you wish to obtain once the data has been normalized. For example, if the normalized value determined is C2, and the values to be normalized are C2, C2 and ITSM, all the targeted fields containing one of the three values to be normalized will be converted to C2. *Note: The values in the column normalized value must be unique.*
Values to normalize	In this field, you can enter the value(s) you wish to normalize during an import that will be converted to the defined normalized value. *Note: The values in the column "Values To Normalize" must be unique.*

9.9.3. Modifying a data normalization

To modify an existing data normalization, select the desired item to access the details.

You can access the same available fields as when you are creating a new data normalization.

9.9.4. Activating a data normalization during import option

To activate the data normalization option at the time of an import, you must apply certain parameters depending on the type of import from the Management > Advanced Settings > Imports menu.

- For an ODBC import, you must add the following attribute: normalizeData="true."
- For a CSV import, you must set the option Normalize the data to Yes.
- For an API import, you must use the right parameter for the API used.

A new section for data normalization is available in the import results.

9.10. Managing your other advanced settings

The Management > Advanced Settings > Other Settings menu has several sections that lets you configure multiple C2 parameters.

Here are the different available setting sections:

- Dev environment permissions list
- Working hours
- Service-level settings
- Tickets
- Ticket views
- Service catalog
- Mailboxes
- Portal
- Application
- Client search
- Additional fields used for searching CIs
- Timer
- Data entry languages
- Memo fields
- Telephony
- Import configuration
- External identification (SSO)
- Authentication method
- Maintenance
- File extensions and size
-

9.10.1. Dev environment permissions list

The Management > Advanced Settings > Other Settings > Dev Environment Permissions List section is only available on C2 ITSM development environments.

This feature allows you to apply "Whitelisting" rule by specifying which emails can enter and leave your C2 development instance. It also allows you to determine the URLs of outbound API calls that can be made.

This feature is useful to avoid having to run a script to modify the email addresses of clients to avoid sending them emails.

For example, if you enter a test email address in the Outbound email address field and run a client import with the Send activation emails setting enabled, all emails are sent to the test email address.

9.10.1.1. Enabling the Dev environment permissions lists

Whether the Dev Environment Permissions Lists section is active depends on whether you have a cloud based or on-site C2 instance.

If cloud-based, you must contact the support team to activate this section.
If on-site, configure the C2AtomSettings.config file to edit the following value, or add the line if it is not there:

- <add key="IsDev" value="true" />

9.10.1.2. Configuring your Dev environment permissions

Here are the field details available to configure this section:

Field	Description
Outbound API Call URLs	In this field, you can enter the outbound API URL that you want to allow in your C2 development instance. *Note: If the field is empty, everything will be blocked. If a "*" is included in the field, your instance has no restrictions.*
Inbound Mail Addresses	In this field, you can enter the inbound email addresses you want to allow in your C2 development instance. Add a comma between each address if you want to enter more than one email address in this field. You can also add all domain users by following this nomenclature: @domainname.com. *Note: If the field is empty, everything will be blocked. If a "*" is included in the field, your instance has no restrictions.*
Outbound Mail Addresses	You can enter the outbound email addresses that you want to allow in your C2 development instance in this field. Add a comma between each address if you want to enter more than one email address in this field. You can also add all domain users by following this nomenclature: @domainname.com.

	Note: If the field is empty, everything will be blocked. If a "" is included in the field, your instance has no restrictions.*

9.10.2. Working hours

You can set default service hours in the Management > Advanced Settings > Other Settings > Working Hours section.

The hours set in this section will be considered for service level agreements (SLA) if you don't specify working hours directly in the service.

> *Note: You cannot set different times per day. If you have different hours per day, you must set them in each service. For more details, refer to section 3.3.5 Adding custom fields to services.*

9.10.2.1. Setting your default working hours

Fill in the following fields to define your default working hours:

Field	Description
Always open	This field identifies whether there is 24/7 service. *Note: if you set this option to yes, the "From," "To," "Start time" and "End time" fields becomes unavailable and grayed out.*
From	This field indicates the default starts day for the work week.
To	This field indicates the default end day for the work week.
Start time	This field indicates the default start time for a workday.
End time	This field indicates the default end time for a workday.

9.10.3. Service level parameters

The Management > Advanced Settings > Other Settings > Service Level Parameters section sets the remaining time required to change the color of the Service Level Agreement (SLA) indicators.

For example:

- The processing start and resolution indicator turn yellow if they are under 240 minutes left before the deadline.
- The indicators turn orange when under 60 minutes are left before the deadline.
- The indicators only turn red when the deadline is up.

You can also set whether the response time in days stops at the end of the day or is based on the number of working hours equivalent to one day.

For example:

- If you set the hours of operation as 8 a.m. to 4 p.m. for an 8-hour working day, the response time is one day.
- If the Time in days stops at the end of the day is set to yes, then a request created at 2 p.m. needs to be answered by the next day at 4 p.m.
- If the Time in days stops at the end of the day is set to no, then the request needs be answered within 8 working hours, meaning 2 p.m. the next day.

> *Note: You cannot set a time for the color red, this indicator always applies when processing time has expired.*

9.10.4. Tickets

The Management > Advanced Settings > Other Settings > Tickets section lets you define default options for tickets. Here are the available settings:

Field	Description
Queue	You must specify a default queue. If no queue is registered in your request or task, this queue is used.
AutoAssign	You can assign the request automatically. You can also start the timer automatically when a resource selects a ticket to process.

Always-on conversion	To change an existing ticket type, e.g., from incident to service request, you need to convert the ticket. This setting keeps the tickets' conversion button active to help the resource properly categorize the newly received ticket.
Email template	You can set a default email template when processing a request. Resources can still select other available models for their group.
Print template	You can set a default print template when processing a request. Resources can still select other available models for their group.
English and French email signature	You can configure a default signature for emails in the general settings for everyone. *Note: It is possible to assign an individual signature for each of your groups, to do this you must configure the signature from the group management menu. For more details, please refer to the section: 2.4 Managing your groups.*

9.10.5. Ticket views

The Management > Advanced settings > Other settings > Ticket views section activates the dispatch view feature at the main grid level. This setting is disabled by default. The dispatch view enables resources to dispatch tickets to other resources.

Tickets must contain planning to access them in this view. Tickets can be dragged and dropped between resources.

9.10.6. Service catalog

The Management > Advanced Settings > Other Settings > Service Catalog section defines how service catalogs are sorted in the portal, either alphabetically or by sequence number.

9.10.7. Messaging

The Management > Advanced Settings > Other Settings > Messages section sets the default email address to be used to send automated emails in the application.

This address is helpful for sending authorizations via email.

> *Note: To use this feature, you must first configure at least one mailbox. For more details on mailboxes, please refer to the section:* *6.3 Managing your mailboxes.*

9.10.8. Portal

The Management > Advanced Settings > Other Settings > Portal section customizes the look of the end-user portal for all clients.

Here are the settings available in this section:

Field	Description
Logo	With this field, you can change the C2 logo in the portal to show your enterprise's logo instead.
Header color	You can change the color of the banner and the color of the text to match your organization's colors.
Buttons color	You can change the button colors to match the colors of your organization.
Home Banner	You can change the banner on the C2 Portal homepage. You can choose an image that better represents your organization.
CSS Style	You can insert a CSS style in this field to apply it to the portal.
Anonymous client	You can select a client from the autocomplete field to use as an anonymous portal access. After selecting a client, a URL link is available to be shared.

	Each person who accesses the portal using the URL link will be represented by the selected client account.
Client File Change Request	This field lets you configure a request for change of personal information that clients can use when they check their information in the portal. Once the request is configured in the portal settings, the client can then click on the button in the upper right corner to open the request and ask for a change to their personal information.
Landing page	This field configures the default homepage when the portal opens. This is the first page the client sees. By default, you can also display the knowledge base, the new ticket wizard, or a homepage.
Number of CIs displayed for Search	You can use this field to define the number of CIs returned after a search. The higher the number, the longer the search takes.
Show Knowledge Base on Portal	This field allows you to select from three options to determine the behavior of the knowledge base on the client portal. • Yes: The knowledge base is accessible on the portal. • No: The knowledge base is not accessible on the portal. • Functional URLs only: The knowledge base is not accessible on the portal; however, you can share the URL link of a knowledge article directly to a client so they can access it. *Note: When you send a knowledge article link directly to a client with the Functional URLs only mode, the permissions and security configured in C2 apply.*
Ticket cancel button	You can create a button-type field to cancel a ticket in the portal. Once the field is created, you can set it in the "Ticket Cancel Button" field. Clients are then able to cancel tickets in the portal.

Request for the Chat	If you want the chat function to be available to your clients on the portal, you must select which request should be automatically created during a chat from the autocomplete field: Request for the Chat.
Grid Tickets	This field sets the grid that is visible to clients. Clients cannot modify the grid, so it is crucial to select the visible fields properly. A single grid is available for all portal clients, no matter the request.

9.10.9. Application

The Management > Advanced Settings > Other Settings > Application section configures the default grid visible to your resources in the application.

Your resources can then edit the grid or create new ones if they have sufficient rights.

9.10.10. Clients search

The Management > Advanced Settings > Other Settings > Clients Search section is used for defining two additional fields when searching for a client.

By default, when searching for a client, the system searches through names, first names and enterprises.

Customized client search: This lets you search using a client search template.

Search fields: This lets you define two additional fields when searching for a client.

Displayed fields: This lets you display two additional fields when searching for a client. These fields can be different from the search fields.

The Replace User Preferences and Replace Group Preferences buttons: This resets resources' and resource groups' preferences to the settings shown here.

9.10.11. Extra fields used for CI search

The Management > Advanced Settings > Other Settings > Extra fields used for CI search section defines two additional fields when searching for a CI.

Search fields: This lets you define two additional fields when searching for a CI. By default, when searching for a CI, the system searches through names and CI numbers.

Displayed fields: This lets you display two additional fields when searching for a CI. These fields can be different from the search fields.

9.10.12. Timer

The Management > Advanced Settings > Other Settings > Timer section sets the duration of a working day and the duration of a working week. You can enter the number of hours and minutes for each duration.

The times entered in the timer are used by C2 to calculate processing time and timesheets.

> *Note: If you want to use the timer or the timesheet, you must enter the enterprise's number of hours per working day and the duration of a working week.*

9.10.13. Languages for data input

The Management > Advanced settings > Other settings > Languages for data input section is used to select the application's working language.

To ensure that C2 works smoothly, you must at least set one of the two languages to yes. If you set both languages to yes, then all settings will be shown in English and French.

Resources see the information according to the language preference in their settings.

9.10.14. Memo fields

The Management > Advanced Settings > Other Settings > Memo Fields section allows you to set the chronological order from top to bottom when a new entry is made in a memo field.

To set the chronological order, you must select one of the following two options from the drop-down menu:

Option	Description
Top	By default, this option is active. This option allows you to define a reverse chronological order for each new entry in the memo field, always starting with the

	most recent entry. For example: • [User 202X-0X-0X 15:45:00] Text entry • [User 202X-0X-0X 15:30:00] Text entry • [User 202X-0X-0X 15:15:00] Text entry
Bottom	This option allows you to define a standard chronological order for each new entry in the memo field, always starting with the oldest entry. For example: • [User 202X-0X-0X 15:15:00] Text entry • [User 202X-0X-0X 15:30:00] Text entry • [User 202X-0X-0X 15:45:00] Text entry

9.10.15. Telephony

The Management > Advanced Settings > Other Settings > Telephony section allows you to associate a telephone system with the C2 ITSM application.

When a call is made, C2 searches for the client and the resource that answers. An empty ticket is automatically created in the name of the calling client and inserted into the queue of the resource handling the call.

Here are the parameters available in this section:

Field	Description
Active	The default value is No. This field allows you to control whether a phone system is linked and active in C2 ITSM.

	Note: You must select yes for the other configuration fields to be visible.
HTTP Request Filter	This field is optional and allows you to add a regular expression (RegEx) to filter incoming calls. *Note: This information is provided by your phone system.*
Client lookup field	This field is mandatory. You must define in which field the system should search for the client.
Resource Lookup Field	This field is mandatory. You must define in which field the system should search for the resource.
Caller Mapping	HTTP Request field representing the caller. *Note: This information is provided by your phone system.*
Callee Mapping	HTTP Request field representing the callee. *Note: This information is provided by your phone system.*

9.10.16. Import configuration

The Management > Advanced settings > Other settings > Import configuration section is where you can write your configurations in XML format to generate an ODBC import.

If this field is empty, importing using the **ODBC** option is not available in the **Imports** management menu.

For more details on configuring ODBC imports, refer to the **import guide**.

9.10.17. External Login (SSO)

The **Management > Advanced Settings > Other Settings > External Login (SSO)** section configures the automatic creation of clients from an external source.

Here are the different available modes:

- Active Directory
- LDAP
- Authentication server
- Azure
- OAuth Cumulus
- OAuth 2
- SAML

9.10.18. File extensions and size

The Management > Advanced Settings > Other Settings > File Extensions and Size sets a limit on the file size and file extensions that will be imported into C2.

This limitation applies to emails received as well as to files added in the application.

9.10.19. Clean Up

The Management > Advanced Settings > Other Settings > Clean Up section lets you occasionally delete certain database items. We strongly recommend that you set precise rules to prevent errors.

> *WARNING: This section deletes the data. You can only restore it if your database is backed up.*

10. Managing reports

The **Management > Reports** menu lets you run and manage C2 reports. This management menu has two sub-menus:

- **Reports:** This submenu runs an existing report.
- **Reports Designer:** This submenu is where you manage, import, export and design your reports.

The C2 **report** module uses the **Stimulsoft** tool to design reports. **Stimulsoft** reports uses the **MRT** file format.

Stimulsoft lets you retrieve and use data from your C2 instance to generate **customized reports.** This data is stored in a data warehouse that periodically updates throughout the day. Below are the refresh times for the Production and Development environments:

Production	Development
5 a.m. 1 p.m. 6 p.m.	5 a.m. 10:30 a.m. 1 p.m. 6 p.m.

> *Note: To use the reports, please contact the C2 ITSM analyst team so that they can enable the Datawarehouse setting in your C2 instance. In addition, the C2 team can provide several pre-configured reports to meet your needs.*

10.1. Managing your reports

The **Management > Reports > Report Designer** menu is where you **manage** the available reports in your C2 instance.

In this menu, you can **view** your existing reports, **import**, **export**, **modify** and **design reports.**

10.1.1. Viewing your reports

The Management > Advanced Settings > Reports Designer tab displays the entire item grid.

To display a report's general information, select the desired item.

To facilitate navigation, you can search your existing items using the Search by name field, which enables you to search by both number and name.

To view the inactive items, check the Deactivated items option.

To view the details of a report, you must first select it and then click on the Edit button. This opens a new window in the Stimulsoft report editor.

10.1.2. Importing and exporting reports

The Management > Reports > Reports Designer menu is where reports are imported to and exported from your C2 instance.

To import a report, click on the Import button, then a file explorer window appears so that you can select the report to import. The report files used in C2 are of the MRT type. They are generated by the Stimulsoft tool.

To export a report, you must first select the one you wish to export and then click on the Export button. The report will be downloaded as an MRT file.

10.1.3. Designing a new report

Select create and fill in the associated general information fields to design a new report.

After filling in the general information fields, you must save this new entry and click on the Edit button to bring up the Stimulsoft report designer window.

> *Note: This guide does not cover how to design a report using the Stimulsoft tool. For further help, please contact the C2 analyst team.*

Here are the general information fields to fill in:

General information

Field	Description
Active	The default value is YES. Through this field, you can check whether this report is available for users.
English and French name	This field is required. This field lets you enter the name to identify this item. *Note: If your C2 environment is monolingual, only the set language is displayed*
English and French description	This field lets you add a description to provide more details about this item. *Note: If your C2 environment is monolingual, only the set language is displayed.*

Security

This section allows you to restrict access to this report to a specific group or groups of resources from the autocomplete field. If no group is defined, the report is accessible by default to all resources with access to reports.

10.1.4. Editing a report

To edit an existing report, you must first select the desired item to access its general information.

You can access the same available fields as when you are creating a new report.

To edit the contents of a report, you must click on the Edit button to access the Stimulsoft report designer window.

10.1.4.1. Editing data source SQL queries.

You can edit the SQL queries of the data source to tailor the reports to your needs. You must edit the report from the Report Designer to do so.

Editing a data source SQL query

Here are the steps to edit SQL queries and retrieve information from your custom fields in a ticket or CI report:

1. Select the report and click on the edit button.
2. Select the item by double-clicking on Data Sources > Connection [MS SQL] and choose one of the tables from the Dictionary section of the side menu.
3. Insert your new query in the Query text section.

Examples of SQL queries to retrieve custom fields from tickets or CIs

Here are two examples of SQL queries to retrieve information from your custom ticket or CI fields in a report.

The CFD values followed by numbers in the following queries match your custom fields.

- For example, cfd146 is the custom field number, the equivalent to Custom146.

You can modify the query below and add the number of rows or fields you need. You can also replace

the alias value with the actual name of your field, for example: cfd146.DateTimeValue as ProductionDate instead of cfd146.DateTimeValue as cfd146.

Sample query for tickets:

```
select tickets.*,
cfd145.ListItemValue as cfd145,
cfd146.DateTimeValue as cfd146,
cfd147.Value as cfd147,
cfd812.StringValue as cfd812 (for a memo field… StringValue makes sure you get all the characters in the field)
from tickets
inner join CustomFieldDatas cfd145 on Tickets.Id = cfd145.TicketId
inner join CustomFieldDatas cfd146 on Tickets.Id = cfd146.TicketId
inner join CustomFieldDatas cfd147 on Tickets.Id = cfd147.TicketId
inner join CustomFieldDatas cfd812 on Tickets.Id = cfd812.TicketId
where cfd145.FieldDefinitionSequenceNumber = 145
and cfd146.FieldDefinitionSequenceNumber = 146
and cfd147.FieldDefinitionSequenceNumber = 147
and cfd812.FieldDefinitionSequenceNumber = 812
```

> *Important: you may have to change cfd145.ListItemValue as cfd145 to cfd145.ListItemName as cfd145.*

Explanation of the example above:

All custom fields are in the CustomFieldDatas table.

We use the appropriate column, depending on the type of field we want to retrieve. For example, for a date field, we use DateTimeValue.

To get the fields linked to a ticket, we use a join between the Tickets table and the CustomFieldDatas table on the ticket ID. FieldDefinitionSequenceNumber is the sequence number of the custom field.

Sample query for CIs:

```
Select *, cfd77.DateTimeValue as cfd77
from CIs
inner join CustomFieldDatas cfd77 on Cis.Id = cfd77.CIId
where cfd77.FieldDefinitionSequenceNumber = 77 and
Discriminator='CI' and
cfd77.DateTimeValue between @From and @To
```

In the Edit data source menu, when calling custom fields using the query, it is important to delete the columns using the X button and then recover them. These two actions bring the selected fields back into the table so that you can use them in your report.

10.2. Running your reports

The Management > Reports > Report menu runs your existing reports from a drop-down list.

You must have at least one report available in your report list to run a report.

10.2.1. Running a report

You must select the report you want to run from the drop-down list.

The report results will be displayed after it runs. Once a report is run, you can print it, save it in many formats and change how the results are displayed.

> *Note: Some reports have parameters that you need to fill out to run.*
>
> *For example, a timesheet report may require that you fill in the Ticket #, Resource and start and end dates before it can run and display the results.*

10.3. Automating your reports

You can periodically email your reports to your clients or resources.

Here are the steps to follow:

1. Create a CI with a date custom field: Next report date.
2. Create an email template to which you can attach the report in an upcoming step.
3. Create a process that targets CIs with the following conditions: CI number = CI created in the previous step and Report date with an offset of 0 minutes.
4. In the process actions, select Send Email, select the email template you created earlier and then add the clients or resources that receive the report.
5. Choose the report to attach to the email and select the format.
6. In the process advanced settings, set re-execution to yes.

10.4. Managing access to reports

To give separate groups access to the reports, you must configure the application's security settings for each group.

The required application security options are:

- Menu > Management
- Reports > Create / Modify / View

> *Note: You cannot set permissions on the reports themselves. You can only do so at the menu level. However, you can restrict the groups to read-only by only enabling the View permission.*

11. APPENDIX A

11.1. Applying conditions

Conditions are logical rules that are evaluated sequentially by the system and that precisely locate the items searched.

Conditions are grouped by AND / OR logical operators in which you can also define sub-conditions—a group of conditions referred to as child conditions—which also use AND / OR logical operators.

Sub-conditions—the group of conditions referred to as child conditions—cannot have the same logical operator as the parent group.

For example, if the group(s) of parent conditions is/are defined with the AND logical operator, all the child sub-conditions will be defined with the OR logical operator by default.

Conversely, if the group(s) of parent conditions is/are defined with the OR logical operator, all the child sub-conditions will be defined with the AND logical operator by default.

Example 1: Parent operator OR

File = “Service centre”

AND

Status = “In progress”

AND

Status report = “In progress”

OR

File = “Development”

AND

Status = “Investigation”

Example 2: Parent operator AND

File = “Service centre”

OR

Status = “In progress”

OR

Status report = “In progress”

AND

File = “Development”

OR

Status = “Investigation”

11.2. Using logical operators

Several operators are available depending on the field **types**. Most operators are easy to use because they are standard operators:

- =
- <>
- <
- <=
- >
- >=
- Has a value
- Does not have a value
- Contains
- Does not contain
- Begins with
- Does not begin with

You can compare the value of the source field to a specific **value**, **variable** or **field** of another **entity** using the **Compare to** field. It allows you to only select fields of the **same type** as the field that was selected in connection with the source.

For example: if you want to automatically send an email to a client when the ticket status of their request switches to **Implemented**, the following condition could be used:

- **Source:** Ticket
- **Field:** Status
- **Operator:** =
- **Compare to:** Specific
- **Value:** Implemented

> *Note: If the source field is of the list type, you can select several values for the same condition using the One value of field. Using this field instead of configuring several conditions for each of the values in a list offers better system performance.*

Specific operators for Date and Time type fields.

Specific operators that are not standard exist for fields of the **Date/Time**, and **Date and time** types, so here is how you use them.

- **Between:** This operator allows you to select two **dates** or two **times** to find the items that exist between these dates or times. The dates/times selected are fixed in time, e.g., January 4, 2022, 1:30 p.m.
- **Day of Week:** This operator tests whether the date selected is a weekday (Monday to Friday).
- **Offset:** This operator allows you to find items or a date within a time interval, but where the time is not **fixed**, e.g., within the last 5 to 10 days or in the next 2 to 4 hours. If the **Start** or **End** field is left **blank**, this means **infinity**, therefore, no start or end limits.

Here are some start/end examples for a **Date** field and what the **offset** will find:

Dates searched	Start field	End field
In the last day	-1 day	0 days
In the last 5 days	-5 days	0 days
In the last 5 to 10 days	-10 days	-5 days
In the next 2 hours	0 hours	2 hours
In the next 2 to 4 hours	2 hours	4 hours
Over 10 days ago	Blank	-10 days
In over 4 hours	4 hours	Blank

You can also perform **offset** calculations on a **date and time** type fields when using a **standard operator**. To do so, select **Now** in the **Compare to** field and add an offset to the current date and time.

> *Note: When you wish to search only by tasks or tickets in a workflow, it is essential to add the condition If parent ticket has a ticket number first.*

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