Resource

C2 ITSM version 4.11

Resource guide

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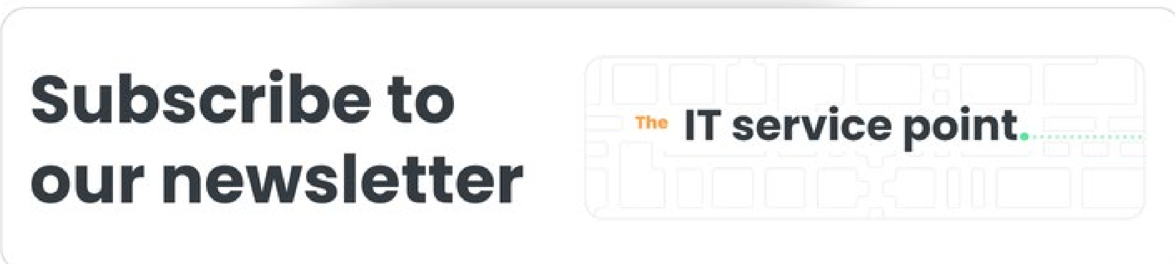
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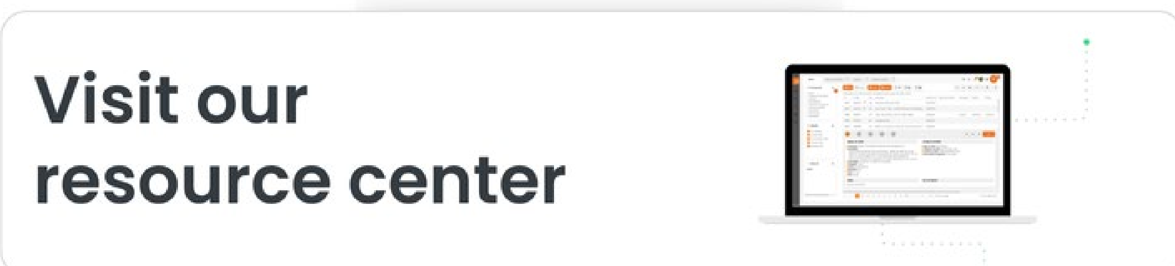
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Term	Definition
Action	An action in C2 represents a command that the system execute based on an associated trigger.
Application	The C2 application is the part of the tool that is accessible to resources, administrators, and managers for managing requests.
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 is a unit of measurement that represents users accessing the application at the same time; also called simultaneous access.
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 (CIs)	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 Notebook
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 forms in C2 ITSM, it can represent a pre-established document that has fields in which the 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 of time 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 will 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 any person 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 made 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 time frame 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 customers.
Tag	A tag is a syntactic unit that retrieves the information captured in C2 ITSM. For example: Using the [Custom181/] tag is used to retrieve 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 in order 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 will affect, 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 purpose of this guide is to help you perform your tasks as a resource in C2 ITSM.

This guide presents the C2 application and explains its features to help you manage your services and process your tickets.

> *Note: Depending on the permissions assigned to your group, some features may not be available to you.*

1.1 Being a resource in C2 ITSM

The following concept represents the role of resources in C2 ITSM:

- C2 resources are the people who receive and process tickets in C2 ITSM. Any users who provide a service to either internal or external customers are considered a resource in C2 ITSM.

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 are:

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

It is strongly recommended to use 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 manage the platform and resources manage 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 provided by your organization.

> *Note: To verify which identification you must use, please refer to your administrator.*

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, the 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: As a resource, you can switch between the Application interface and the Portal interface from your profile menu. For more details, please refer to section 5.9.8 Switching to the portal.*

2. Identifying tickets entry points

The tickets in the C2 application can come from different sources, which we call the entry points.

C2 supports three ticket creation entry points:

- Customer portal
- Emails
- Manual creation

> *Note: You can identify the origin of a ticket by accessing the information contained in it. For more details, please refer to the section; 4.2.2 Information Section.*

2.1 Tickets from the portal

One of the entry points used to create new tickets is the Portal. This interface allows clients to make a request using the available “request tiles,” which in turn generates a ticket. Different requests may be available to meet customer needs.

Once a client submits their request, they receive a confirmation along with the ticket number. This information allows them to view and track their requests in the “My Requests” section of the portal.

As a resource, you access the ticket containing the request information in the “Tickets” tab of the C2 application. You can then process it.

When you access C2 as a resource, you always arrive in the application. However, you can switch to the portal from the profile menu. For more details, please refer to section 5.9.8 Switching to the portal.

2.2 Tickets from an email

Another possible entry point for the creation of new tickets is through an email.

To do this, the client must send a request via email to the company's support address. This option generates a ticket in C2 with a summary from the subject line and a description from the body of the email sent.

Tickets created by email contain only the “Summary” and “Description” fields and remain in the “Other” category in C2 until you or another resource changes them. You can then move the tickets to the proper categories and associate them with the right services according to their content.

The system automatically associates the requesting client if the originating address is present in your client list.

> *Note: The availability of creating tickets by email depends on the policies of each enterprise.*

2.3 Manual Ticket Creation

Another possible entry point is the manual creation of a ticket in the C2 application.

To create a new ticket manually in the C2 application, you must perform the following steps:

1. Press the “New Ticket” button, represented by the “+” icon.
2. Enter the client’s name in the “Client’s name” field.
3. Enter the type of request in the “Request’s name” field.

A new ticket is automatically created in a new tab after you select the client's name and request type. You can then fill in the additional information and save the ticket to keep it in the system.

> *Note: The “Client’s Name” field is filtered according to your available client list while the proposed “Request Name” field is filtered according to the selected client’s catalog.*

3. Navigating the tickets tab

Managing “Requests” is the main function of C2. After logging into the application, you access the “Tickets” tab. It is from this tab that you, as a resource, can manage your client’s requests.

The “Tickets” tab is divided into three parts to allow you to navigate and manage your tickets more easily:

- The side pane
- The header of the views
- The ticket views

This chapter provides the details for each part of the “Tickets” tab.

3.1 Using the side pane

The side pane of the “Tickets” tab allows you to access the groups to which you are assigned, the queues associated with each of these groups, and filters to manage your tickets.

From the side pane, you can access the following sections:

- Groups
- Queues
- Filters

3.1.1 Selecting your groups

As a resource, you are assigned to one or more groups by your administrator. The groups you are assigned to determine your permissions in the C2 application.

In the “Groups” section of the side pane, you can view the list of groups available to you and the resources associated with each group.

In this section, you can perform the following actions:

- View the groups and the resources associated with each of the groups you have access to.
- Drag a ticket from the ticket grid and assign it to a group or a resource who is part of a group.

> *Note: Please refer to your administrators for groups and permission management.*

3.1.2 Selecting your queues

When a ticket is created, regardless of the entry point, it is automatically assigned to one of the available ticket queues according to the parameters configured by your administrator.

Based on the permissions of your groups, the "Queues" section of the side pane allows you to view the available queues and the number of tickets associated with each of them.

In this section you can perform the following actions:

- View the queues you have access to.
- Check or uncheck queues to visualize the tickets associated to them in the grid.
- Move a ticket to a different queue by dragging and dropping the ticket from the grid to the desired queue.

3.1.3 Applying filters

The "Filters" section of the side pane allows you to select from a choice of different public or private filters to apply to the content displayed in the ticket grid. When you select a filter, it always applies to the selected queue.

- Public filters: they come from the configurations applied by your administrators and made available to you.
- Private filters: represent the filters created by you to suit your personal needs. To create your private filters, you must go to the "my options" menu of your profile pane. For more details on configuring filters, please refer to section 5.9.5.3 Filters.

3.2 Using the view header

The view header is available regardless of the active view (Grid, Kanban, Calendar, Gantt, or Dispatch). It allows you to use shortcut buttons to apply filters or execute functions.

The view header contains the following buttons:

- Quick Filters: Tickets, Tasks, Open, Closed, Assigned to me, Draft, and Assigned to my groups.
- Advanced search

- Export
- Print
- Edit Columns
- Return to initial configuration of the grid or use a predefined grid template.
- Views (Grid, Kanban, Calendar, Gantt, or Dispatch)
- Refresh

3.2.1 Using the quick filter buttons

Besides the side pane filters, you can quickly filter your tickets anytime using the following quick filter toggle buttons:

- Tickets
- Tasks
- Open
- Closed
- Draft
- Assigned to me
- Assigned to my groups

For example, the “assigned to me” button allows you to toggle a quick filter to show only the tickets you are assigned to.

To activate a quick filter, you must press the button of the filter you want to apply.

Some buttons are also grouped by their dependencies, such as

- Tickets and Tasks
- Open and Closed

You must have always at least one of the two buttons active. You can also have them all active so that all filters apply simultaneously.

3.2.2 Using the advanced search button

The “Advanced Search” button allows you to define search criteria or use a predefined search template to get the desired results in your tickets view.

For more details on the advanced search, please refer to the section: 5.3.3 Performing an advanced search in tickets.

3.2.3 Using the export button

The "Export" button allows you to export the content of the ticket grid (or other view) to a file using the CSV (Comma-Separated Values) format.

To export the ticket grid, click on the export button.

3.2.4 Using the print button

The "Print" button allows you to print the contents of the ticket grid (or other view) using the print templates predefined by your administrator. To print the ticket grid, you must follow these steps:

1. Verify that tickets are present in your view.
2. Click on the "print" button.
3. Select one of the available print templates from the drop-down menu.
4. (Optional) Check if you want to insert page break.
5. Click on the "OK" button.

3.2.5 Editing column display

The "Edit Columns" button allows you to edit the columns in the "Grid" view according to your preferences.

You can move the order, expand a column, and sort the items in a column. You can group the display by column by dragging a column of your choice above the column header, the display will then be grouped on that column.

Ascending, descending and the ability to check or uncheck columns in the ticket "grid" are available by selecting the arrow icon on a column. This option is only visible when the "Edit Columns" button is active.

Once your edit is complete, you must press the "Edit Columns" button again to close this feature.

3.2.6 Selecting a view type

The "View Type" button allows you to switch between the different types of views available to display your tickets. By default, the active view is grid. For more details on the view types refer to section: 3.3 Using the different views.

3.2.7 Refreshing the lists content

The “Refresh” button lets you refresh the contents of the current view.

3.3 Using the different views

The interface of the “Tickets Grid” tab allows you to display your tickets in different views to suit your needs.

You can switch between the following views by clicking on the “View type” button from the view header:

- Grid view
- Kanban view
- Calendar view
- Gantt view
- Dispatch view

3.3.1 Grid view

The “Grid” is the default view when you access the “Tickets” tab. It allows you to see all the tickets and displays information according to the selected columns.

For example, to facilitate the prioritization of your tasks and monitor your service levels, certain columns allow you to view key information about your tickets:

Columns	Description
Ticket Type	This column allows you to identify the type of ticket by an icon. You can also display its full name by dragging your mouse over it.
Priority	This column allows you to visualize the priority associated with the ticket in the form of a numbered colored circle.
Unread Notes & Emails	This column allows you to view the presence of new notes or unread emails associated with the ticket.

Service-level status (response)	This column allows you to view the response time indicator by its color; green, yellow, orange or red.
Service-level status (resolution)	This column allows you to view the resolution time indicator by its color; green, yellow, orange or red.

You can also change the display of the grid columns and apply filters to make it easier for you to navigate your posts.

> *Note: You cannot add certain types of fields as columns in the "grid" view, including multiple value fields and grids.*

3.3.2 Kanban view

The "Kanban" view allows you to display your tickets in the form of visual cards (Kanban) and to classify them by columns based on a type of "list field" available in a ticket.

For example by selecting the "State" list field, your tickets will be sorted according to their state in the columns that identify with each of the available statuses of the selected list field, in this case: In progress, Waiting External, Waiting for approval, etc.

To use the "Kanban" view, you must follow these steps:

1. Press the "View Type" button.
2. Press on the Kanban view.
3. Click on the "Down Arrow" icon at the top left of the Kanban window to open the "Field" menu
4. Select a list field from the "Field" drop-down menu.
5. (Optional) Finally, if you want to sort the result, you can fill in the third field "Sort by."

> *Note: You can hide the display of the search parameters in the Kanban view by clicking on the small arrow icon between the view header and the columns.*

3.3.3 Calendar view

The “Calendar” view allows you to do some planning in your tickets and tasks. It also allows you to view the active tickets by day, week, or month on the calendar.

This view considers the dates entered in the tickets. For more details, please refer to the section: 4.1.4 Planning.

You can also move tickets by dragging and dropping them directly from the “calendar” view. This affects the dates in the planning section of the ticket.

To allow you to navigate in this view, the following additional functions are available in the calendar header:

Functions	Description
Previous	Left side arrow icon allows you to go back one page per month, week, or day.
Next	Right side arrow icon allows you to go forward one page per month, week, or day.
Print	Print the contents of the current view.
Month	Change the calendar display to month-by-month view.
Week	Change the calendar display to a week-by-week view.
Day	Change the calendar view to display one day at a time.
Summary	Change the calendar display to show your items line by line instead of by a block of time over a week.

3.3.4 Gantt view

The “Gantt” view allows you to manage your projects and see the tasks of your tickets.

You can also view the estimated duration of tasks. To do this, you need to define it beforehand in the task template or manually in the “Planning” section.

You can also plan your tickets and tasks simply by double-clicking on the desired date next to the ticket or task.

3.3.5 Dispatch view

The “Dispatch” view allows you to assume the role of “dispatcher” to assign tickets and tasks to resources.

This view is separated in two sections:

- The top section is displayed as a calendar where you can find tickets and tasks represented by blocks of time.
- The bottom section is displayed as a list and contains all the tickets and tasks related to your groups.

To access the tickets assigned to a resource, you must enter its name in the “Add Resource” field from the calendar header. The resources available here depends on the groups assigned to you. You can also select multiple resources from the “Add Resource” field to get a comparative view of each resource's tickets and tasks.

You can assign a ticket directly to a resource's schedule by dragging and dropping it from the tickets list. You can also reassign a ticket to a different resource, by moving its block of time from the current resource to another.

From the calendar section, you can modify the planning of a ticket by changing its date or time, to do so you can move, extend, or reduce the block of time directly.

To navigate in this view, additional functions are available from the calendar header, here’s the list of functions:

Functions	Description
Previous	Allows you to go back one page per day, work week or full week.
Next	Allows you to move forward one page per day, work week or full week.
Remove all resources	Allows you to delete the currently selected resources.

Add a resource	This autocomplete field allows you to type the name of one or more resources and select them to manage their tickets and tasks.
Day	Allows you to change the calendar display to show one day at a time.
Work Week	Allows you to change the calendar display to show a work week (working days).
Full week	Allows you to change the calendar display to show a full week.

4. Processing your tickets

This chapter provides the details you need to use the ticket interface. As a resource, this interface allows you to process tickets.

To access the ticket interface, you can click on the ticket number in the "# ticket" column from the Ticket Grid or press the "Edit" button from the ticket preview.

> *Note: You can also access the ticket interface by selecting a ticket from the different views available in the "Ticket Grid" tab.*

4.1 Using the side pane of a ticket

The side pane in the ticket interface allows you to find several important information grouped under different sections.

From the side pane, you can access the following sections:

- Client
- Associated CI
- Follow-up
- Planning
- Service Level
- Assigned To Resources

- Assigned To Groups
- Timer
- Indicators

4.1.1 Client

This section of the side pane allows you to view or change information about the clients who submitted the request for this ticket.

A ticket can contain one or more clients, so you can add, edit or remove clients from the ticket. A number representing how many clients are associated with the ticket will be displayed in parentheses in the section header.

To add a client, you must type its name in the “Client” autocomplete field, however, if the client does not exist in the system, you can create a new one by pressing the “Create Client” button.

You can modify the information of a client associated to the ticket by pressing the button “Edit” of the client tile.

To remove a client associated with the ticket, you must press the “x” icon on the client tile.

> *Note: To create new clients, you must have the necessary permissions from your administrator.*

Enterprise associated to the client

This section also contains the information about the enterprise associated with the clients for this ticket.

An enterprise must be associated to the clients for them to have access to the service catalogs, this is what determines the types of requests they can generate. If the client is associated with multiple enterprises, the system selects their primary enterprise by default.

You can change the enterprise associated to the client by pressing the “X” icon then select the desired one from the drop-down menu. The enterprises proposed are those associated with the main client.

4.1.2 Associated CI

This section of the side pane allows you to select the Configuration Items (CIs) associated to the client or enterprise. Each Configuration Item (CI) you select appears as a tile in this section.

To add a Configuration Item (CI) to the ticket, you must type the letters associated with the CI in the autocomplete field then select the desired one from the choices provided.

A number representing how many Configuration Items (CIs) are associated with the ticket will be displayed in parentheses in the section header.

4.1.3 Follow-up

This section of the side pane allows you to view important dates and times fields related to this request, for example, the date the ticket was created, the last update, the closing date, etc.

The date and time information in this section are automatically generated by the system according to the parameters set by your administrators.

Here are the details for each field in this section:

Field	Description
Creation Date	Date and time the ticket was created.
Created by	The user who created the request.
Update Date	Date and time of the last modification to the ticket.
Last Modified by	Contains the username of the last resource that made changes.
Closed Date	Date and time the ticket was closed.
Closed By	The user who closed the ticket.

First assignment	Date and time on which the ticket is no longer in a “new” status and was assigned.
Implementation Date	Date and time the status was set to implement.
Reactivation Date	Date and time the ticket was reopened.

> *Note: You can find system information in the “Created by” and “Last modified by” fields if the ticket was created or modified by an automatism configured by your administrators.*

4.1.4 Planning

This section of the side pane allows you to plan the processing of a ticket by adding a start and end date and time. Once a planning is added to the ticket, it is available in the “calendar” view of the “Tickets Grid” tab.

To select a date, you must press the calendar icon available in the “Start date” and “End date” fields to display a calendar and choose the desired date.

To select a time, you must press the clock icon next to the calendar icon and choose the desired time from the drop-down menu. The times shown are in 30-minute increments.

You can also plan a ticket for an entire day by selecting “yes” from the “Is full day” drop-down menu. When this option is active, only a date can be selected.

> *Note: You can enter the date and time manually in the “Start Date” and “End Date” fields, the accepted format is: YYYY/MM/DD HH:mm.*

4.1.5 Service Level

This section of the side pane allows you to view the service levels associated with this post. Here are the details for each of the fields in this section:

Field	Description
Response time	Attribute (for informational purposes) that represents the response time determined for this type of request. This has an impact on the performance indicator that can be displayed as a column in the “Tickets Grid” tab.
Resolution time	Attribute (for informational purposes) that represents the resolution time determined for this type of request. This has an impact on the performance indicator that can be displayed as a column in the “Tickets Grid” tab.
Prioritization date	The date and time recorded by the system when an “Impact” and “Urgency” have been selected to determine a priority for the ticket.
Service Hours	Working hours according to the service-level settings applied by your administrators.
Calculated Response Date	Displays a date and time that is calculated based on the priority and response service levels set by your administrators.
Actual Response Date	Displays the date and time recorded when the ticket was handled.
Desired Resolution Date	Calculated based on the priority and response service levels set by your administrators.
Actual Resolution Date	Shows the date and time recorded when the ticket was resolved.

Expected Resolution Date	As a resource you can define the desired resolution date.
Cost	Attribute of the request (for information purposes only).
Price	Attribute of the request (for information purposes only).

4.1.6 Assigned to resources

This section of the side pane allows you to assign the ticket to yourself or other resources to handle the ticket.

If you want to take charge of a ticket quickly, you can assign the ticket to yourself by clicking on the “Auto Assign” button.

To assign other resources to the ticket, you must type the resource name in the “Resource” autocomplete field and select the desired resource.

A number representing how many resources are associated with the ticket will be displayed in parentheses in the section header.

> *Note: Depending on the options configured by your administrators, a resource assigned to a ticket by another resource may automatically receive an email or notification.*

4.1.7 Assigned to groups

This section of the side pane allows you to assign the ticket to groups, which can represent teams.

For example: By assigning the ticket to one of your groups, another member of that group (a resource) can then take over the ticket.

> *Note: Depending on the options configured by your administrators, when a ticket is assigned to a group by another resource, an email or notification may automatically be sent to all resources in that group.*

4.1.8 Timer

This section allows you to manage, enter and calculate the time effort when working on your tickets. You can also associate banked hours to deduct the time worked from it.

> *Note: To have access to the Banked Hours, they must be previously configured by your administrators.*

To add time on the ticket, you have two options:

- Using the timer
- Manually adding a timesheet

When you enter time on the ticket, the following fields will be used to display the calculation:

Field	Description
Duration	Displays the billable and non-billable total of the resource on the ticket only.
Estimated Duration	Allows you to enter an estimate of the time required to complete the processing of this ticket.
Total duration	Displays the resource's billable and non-billable time on the ticket and its tasks.
Difference	Represents the difference in time between the “Estimated Duration” field and the “Total duration” field.

Using the Timer

To use the timer, press the “Play” button; when the timer is active, the interface refreshes to show new information and features.

A stopwatch is directly below the ticket number on the Ticket tab, allowing you to see in real time the elapsed time since the timer was activated.

The “Play” button will be replaced by two buttons:

- Stop: This button allows you to stop the current timer. Once you stop it, a timesheet pop-up appears where you must add a comment to save the new time entry.
- Cancel: This button allows you to cancel the current timer, the calculated time will not be retained.

The fields “Start Time” and “Elapsed Time” will be displayed:

Field	Description
Start Time	Displays the date and time when you started the timer.
Elapsed Time	Displays the time elapsed since the timer was activated in real time.

Adding a Timesheet Manually

To add time manually, you must press the “Plus” button, this brings up the “Timesheet” pop-up window.

The timesheet window allows you to fill in the following fields:

Field	Description
Banked Hours	Allows you to associate the ticket to Banked Hours from the drop-down menu. The hours entered in the timesheet will be debited from the associated Banked Hours.
Remaining Hours	Displays the number of hours remaining in the selected Banked Hours. *Note: This field remains empty if no Banked Hours is selected.*

Start	This field is required. Allows you to enter the date and time that marks the beginning of the calculation of the processing time for this time entry.
End	This field is required. Allows you to enter the date and time that marks the end of the processing time calculation for this time entry.
Duration	This field is required. When you enter a "Start" and "End" time, this field displays the calculation in hours and minutes that separates the end date from the start date. You can also enter the time entry manually here, using the format HH:MM:SS. *Note: The duration is limited to a maximum of 24 hours.*
Comments	This field is required. You must enter a comment to describe this time entry.

Associating Banked Hours

To associate a time bank to the ticket, you must select one from the drop-down menu.

> *Note: To have access to time banks, they must be configured by your administrators and be associated to the enterprise or the main CI of the ticket.*

Here are the details of the additional fields associated to the banks of hours:

Field	Description
Purchased Hours	Displays the number of hours present in the selected Banked Hours.
Remaining Hours	Displays the number of hours remaining in the selected Banked Hours.
Billable Duration	Displays the cumulative time entries of all timesheets associated with this Banked Hours.
Billable Overtime	Displays the cumulative overtime entries of all timesheets associated with this Banked Hours.
Total Billable Duration	Displays the cumulative time entries of all timesheets associated with this Banked Hours.
Total Billable Overtime	Displays the cumulative overtime entries of all timesheets associated with this Banked Hours.

4.1.9 Indicators

This section allows you to see the response time and resolution time calculated in your ticket through visual indicators.

The visual indicators change color from green, yellow, orange and red depending on the service levels.

4.2 Interpreting ticket sections

At the heart of the tickets are several field sections that allow you to enter the information necessary to process them. By default, all C2 tickets have system-generated field sections.

Besides the default sections, some tickets have additional field sections that are specific to their request type, this depends on the configurations applied by your administrators.

Here are the system field sections you may find in C2 tickets:

- Categorization
- Information
- General Description
- Prioritization
- Resolution
- Workflow
- References
- Attachments
- Notes & Emails
- Activities

> *Note: You can change the default order of field sections in tickets by accessing your profile preferences. For more details, please refer to the section:* *5.9.5.6 Other preferences.*

4.2.1 Categorization

This section allows you to access the ticket categorization. This relates directly to the configuration of the service catalog. The choice of request determines the field sections that make up the ticket.

The categorization follows the following logic:

1. Catalog
2. Category
3. Service
4. Request

You can select or modify the request to change its categorization by selecting one of the choices from the drop-down lists or by performing a manual search from the magnifying glass icon.

The available requests are only of the same type as the ticket. If you want to access all types of requests, you must first press the "Allow conversion" button so that the ticket can be converted into another type.

> *Note: When you make the change or conversion of a request, the modified fields (according to the template) will be highlighted. The workflow will also be modified to reflect the tasks or sub-requests of the new ticket. However, previously completed tasks and sub-requests remains on the ticket.*

4.2.2 Information

This section allows you to access certain information fields on the ticket.

Here are the details for each of the fields in this section:

Field	Description
Queue	This field allows you to select the queue to which the ticket should belong.
Status	This field allows you to select the status of the ticket (New, In Progress, Closed, etc.). You can also see the statuses represented by the dots above the sections. *Note: The available statuses are determined by request type according to your administrators' configurations.*
State	This field allows you to define a state for the ticket that is different from its status. For example, a ticket can have a status of “In progress” and a state of “Pending approval.” *Note: The list of available states is based on your administrators' configurations.*
Business Service	This field allows you to list the ticket for statistical purposes. For example: Associating the ticket with an internal department to specify the origin of the ticket.

Visible on Portal	This field allows you to determine if the ticket is visible on the client's portal.
Origin	This field allows you to determine the origin of the ticket (i.e., by Phone, Email, Portal, etc.).

4.2.3 General description

This section allows you to access the “Summary” field, which represents the title of the ticket, and the “Description” field, which can include a more detailed description about the ticket.

> *Note: This section may not be visible for certain types of requests, depending on the configurations applied by your administrators.*

4.2.4 Prioritization

This section allows you to select the impact level, urgency and client role from the drop-down menus for this ticket. The information you select here is used to define the priority of the ticket.

To define the priority of the ticket, C2 uses a priority matrix by ticket type, predefined by your administrators and based on the impact, urgency and role of the client.

You must assign a priority to your tickets if you want to manage service levels; otherwise they will be reported as overdue.

> *Note: Besides the priorities by request type, your administrators can also set a priority and deadlines for each request.*

4.2.5 Resolution

This section allows you to apply a resolution to your ticket either by selecting an existing resolution from your knowledge base or by creating a new resolution that you can then add using tags to the knowledge base.

When you edit a ticket, the application suggests a choice of resolutions based on a tag search in the “Summary” field.

> *Note: The tags must be associated with the articles in the knowledge base for the application to suggest resolutions.*

Here are the details for each of the fields in this section:

Field	Description
Search Resolution	Allows you to add tags to get more results in the list of suggested resolutions. *Note: In C2, Tags represent keywords associated to a Knowledge Base article.*
Suggested Resolutions	Allows you to select a resolution from the drop-down menu based on those found in your knowledge base.
Resolution Type	This field allows you to select the type of resolution from the drop-down menu that applies to the situation. *Note: The resolution types available depends on the configurations applied by your administrators.*
Technical Resolution	This free text field allows you to enter the technical details that led to the resolution of the ticket. If you are adding tags to create a new resolution article in your knowledge base, the information you enter in this field will be passed on.
Client Resolution	This free text field allows you to enter details about the resolution of the ticket that are accessible from the portal on the client side.
Enter tags to create a new knowledge base item	This field allows you to add tags that will be attached to the "Technical Resolution" field to create a new Knowledge Base article automatically.

	Note: *When you create a new knowledge base article using tags, it has a "awaiting approval" status. A user with the required permissions must approve it; once approved, the article is available to all.*

4.2.6 Workflow

This section allows you to view in diagram from all the tasks or requests that make up the workflow of this ticket.

Tasks or requests in the workflow are numbered according to the order of the steps in which they are executed, allowing you to identify which steps are executed in parallel and which are executed in sequence.

- For example: If two tasks have the same step number, they will be executed in parallel when the workflow reaches that step.
- If two tasks have different step numbers, they will be executed sequentially in the workflow.

You may also be able to add, edit, or delete tasks and requests if your administrators have given you the necessary permissions.

4.2.6.1 Identifying task types and their statuses

In the workflow, you can access two types of tasks: "Approvals" and "Operations." What distinguishes the two types of tasks are the statuses associated with them.

For an "Approval" type task, you can access the following statuses:

- Pending
- Approved
- Refused

Whereas for an "operation" type task, you can access the following statuses:

- New
- In progress
- Closed

4.2.6.2 Adding a new task or request

Some tasks or requests are associated with the ticket by default; however, you can also add new ones.

1. To add a new operation task, approval task or request in the workflow, you must press the “+” button and select the desired item.
2. Add the details related to the new task or request and save it.

> *Note: You must have the appropriate permissions to perform this action. If necessary, please refer to your administrators.*

4.2.6.3 Editing an existing task

You can edit the details of an existing task; this allows you for example to change its step number to define in which order you want it to be executed. You can also change the status of the task.

To change the step number of a task, you need to click on its number to access the task tab and change the number in the “Step” field.

You can also use the dots to change the status of a task. For example, to close a task, you can select the last dot on the right, which represents the “Closed” status.

> *Note: By changing the status of a task you will automatically be assigned it.*

4.2.6.4 Additional information on approval tasks

When you create an approval task, you must add an approver. This may be a client or a resource.

The approver receives an email allowing them to approve or reject the request. The approval task can also be processed from the portal to move the process forward.

Once approved or rejected, you receive a notification on the status of the task.

A pending approval task automatically changes the status of the ticket to “Pending Approval,” once the task is approved or rejected, the status changes to “In Progress.”

4.2.7 References

This section allows you to link one ticket to another, for example link an incident type ticket to a problem type ticket.

If you know the number of the ticket you want to reference, you can quickly reference it by entering its number in the "Add a reference to ticket" field. Depending on the configurations applied by your administrators, the tickets in reference can be updated automatically using a process.

You can also use this section to reference tickets that are duplicates of the ticket in question.

> *Note: In the case of a duplicate, closing the main ticket does not close the duplicate. You must access the duplicate and close it manually.*

4.2.8 Attached files

To manage the attachments associated with the ticket, you can access two subsections:

- Ticket Attachments
- Email Attachment

Ticket Attachments

This subsection allows you to add, modify or delete attachments directly linked to the ticket by the application. The client associated with the ticket can also access the ticket's attachments through their portal access.

To add an attachment, you must press the "Browse…" button and select the file you wish to attach to the ticket.

To view an attachment, click the attachment name to download a copy to your desktop.

You can also delete an attachment by pressing the "x" icon next to it.

> *Note: You can quickly insert a screenshot in this section. To do so, you must first create your screenshot and copy it to your clipboard, then you must paste it by following the indication in the C2 Application: "Click here and then press Ctrl-V to insert a screenshot."*

Email Attachments

This subsection allows you to view, in read-only attachments sent through the email communications associated with the ticket.

4.2.9 Notes & Emails

This section allows you to view notes and emails sent or received from the ticket. Emails are sent from the C2 application from a ticket, and they are also received in the ticket.

> *Note: This section is also visible when viewing a ticket through the portal. Only public notes and emails sent to or from the client are visible.*

4.2.9.1 Adding a note

As a resource, you can add notes. The client can also add notes. Each note contains a timestamp (date and time), the ID of the note creator and its content. Here are the details for each of the fields in this section:

Field	Description
Availability	Allows you to define whether the note is private or public. If public, the note is visible on the client portal; if private, the note is visible only to resources. By default, notes are private in the application.
Type	Allows you to select an event type from a custom list predefined by your administrators. Example of an event type: Leave a message, return call, visit, etc.

Event Date	Allows you to define the date and time of the event to be associated with this note. By default, the date and time are the current ones when you create the note, but you can change them manually.
Follow-up	Select a follow-up date and schedule an email to be sent on the selected date as a reminder to process the ticket. When you select a follow-up date, you must fill in the "Send to recipients" field and define the recipients as "clients" or "groups."
Title	Allows you to enter a title for your note.
Body of the note	This free text field allows you to enter the content of your note. You can also attach files using the "Browse..." button.

4.2.9.2 Deleting your notes

You can delete a note if you are the creator and have the required security permissions.

When you delete a note, a confirmation message appears before deletion. After you delete a note, you must close the note's pop-up window for the "Notes and Emails" section of the ticket or client to update automatically.

The "Activities" section continues to display previous additions and modifications to the deleted note, but when you select the note, a pop-up window appears with the message "Note Deleted" in red. This window displays only the note number.

> *Note: The security that allows the right to delete notes is determined in your group settings. Only your administrators can give you these rights.*

4.2.10 Activities

This section allows you to view the details of all the activities that have taken place in the ticket. You can see all the manual actions performed by the users and the automatic actions performed by the application itself.

By selecting an activity, you can view the details of that activity, such as the time, date, user who performed the action, and the value before and after the changes.

4.3 Using the shortcuts bar

The shortcut bar above the sections of a ticket contains several quick action buttons.

Here are the details for each of the buttons:

Button	Description
Delete	Allows you to delete the ticket.
Chat	Allows you to chat with resources assigned to the same ticket, exchange updates on the ticket and send attachments.
Print	Allows you to print the ticket by choosing a print template predefined by your administrators.
Send Email	Allows you to send an email to the client of this ticket from within the application.
Add Note	Allows you to create a new note.
Allow conversion	Allows you to access the complete list of requests for categorization to convert the ticket type if required.
Copy	Allows you to create a copy of the current ticket.
New	Allows you to create a new ticket by choosing its type. However this ticket is not categorized, you must define its category, its service and select the desired request.

Save	Allows you to save the current ticket.
Save and Close	Allows you to save the current ticket and close the ticket tab.
Save as Draft	This button allows you to save the current ticket as a draft. *Note: This feature is only available if drafts are allowed in the request settings. For more details, please refer to your administrators.*

5. Using the menu bar

As you navigate through the C2 ITSM application, you can access the menu bar at any time. This bar gives you access to the interfaces and functions of the application, as well as shortcut buttons.

This chapter contains information about the various options available from the menu bar.

5.1 Accessing the management menu

The "Management" menu allows you to access the administrative options and settings of the C2 application. To access this menu, you must have the required permissions, as this menu is reserved for administrators of your C2 instance.

> *Note: To have access to this menu, you must have the required permissions. Please refer to your administrators for more details.*

5.2 Using the dashboards

The "Dashboard" menu gives you access to an interface for creating and viewing data in the form of charts or information within a dashboard. You can also make a dashboard public to generate a URL that displays the dashboard in read-only mode.

Dashboards allow you to display different charts and configure the data within them.

To view a dashboard, you must select one that is available from the "List of Dashboards" drop-down menu.

5.2.1 Creating a new dashboard

To create a new dashboard, you must first press the "Create new Dashboard" button, then you must name it and finally save it.

5.2.2 Adding charts

To add charts, you must press the "Add Chart" button and select the desired chart from the list of available items.

Here are the details of the available chart types:

Chart	Description
Pie chart	Allows you to display the configured values in a Pie Chart.
Area Chart	Allows you to display the configured values in the form of an Area Chart.
Line Chart	Allows you to display the configured values in a Line Chart.
Bar Chart	Allows you to display the configured values as a Bar Chart.
Counter	Allows you to display the result of the configured values in numerical format.
HTML	Allows you to display the content of an HTML field.

5.2.3 Configuring chart values

To configure the values of one of the charts of your dashboard, you must press the "tool" icon that is available on the chart UI tile. A pop-up window appears allowing you to configure the values for this chart.

The chart calculations are made from the configured values such as target, grouping, period, and selected duration.

Here are the details of the configuration fields that are available for the charts:

Field	Description
Title	Allows you to name your chart, the title is visible on the chart UI tile.
Target	Allows you to choose a target on which the chart draws its values among the following choices: Tickets, CIs, Clients, and Enterprises. *Note: This field is not available for the "HTML" type chart.*
Grouping	Allows you to group the values according to a system field or an available custom field. *Note: This field is not available for "Counter" and "HTML" type charts.*
Status	This field is only available when the selected target is "ticket" and allows you to choose whether to include tickets with an "Open," "Closed" or both statuses.
Ticket Type	This field is only available when the selected target is "ticket" and allows you to choose a ticket type from the available list.
Search template	This field allows you to use a search template to refine the information you want to see in the chart.
Range	This field allows you to define a numerical value between 1 and 999 in relation to the defined period. The range is always based on the creation date of the target.
Period	This field is linked to the value defined in the "Range" field and allows you to choose from the following options: • Day(s): Starts from the current day. • Month: Starts from the current month and the current day. • Year(s): Starts from the current year.

Content	This field is only available for an HTML type chart and allows you to enter or insert the content you wish to display in the chart.
Chart width	Allows you to specify the width per row that your chart UI tile occupies in the dashboard. A maximum of four charts can be displayed on the same row in the dashboard. The width choices are: • 1/4 - Very small • 1/3 - Small • 1/2 - Medium • 3/4 - Large • 1 - Very wide

5.2.4 Deleting a chart

To delete a chart, press the “x” icon available on the chart UI tile.

5.2.5 Sharing a dashboard

You can share your dashboards by making them public.

To make a dashboard public, you must press the “Make Public” button.

When you enable public mode for a dashboard, C2 generates a read-only URL link that you can share.

The public dashboard updates automatically when a new ticket is created in the system.

You can disable sharing of a dashboard at any time by pressing the “Make Private” button, this removes the link and external access to that dashboard.

> *Note: You and all other resources can share your dashboards if you wish. Besides, the use of the public link does not require a license or to be connected to C2 ITSM. The data is displayed in read-only mode and under the dashboard of the resource that owns the share link.*

5.3 Searching

To meet your operational needs and allow you to find items in the C2 application, several ways to execute a search are available.

5.3.1 Using the search menu

The “Search” menu available from the menu bar allows you to perform an advanced search by target, the available targets are Tickets, CIs, Clients and Enterprises.

Once you have selected a target, you can apply search parameters and conditions using logical operators.

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

You can also run a search from a search template by selecting one from the list of your available search templates.

Once the search is executed, the results will be displayed in the “Search Results” section. You can also subsequently perform the following actions:

- Print the results
- Modify the display of the grid
- Export the list in .CSV format
- Save your search as a Search Template.

> *Note: If your administrators have not provided you with public search templates, you can build templates from your profile menu, for more details please refer to section: 5.9.5.3 Search.*

5.3.2 Performing a quick search

To perform a quick search, you must first press the magnifying glass icon from the menu bar to open the quick search field.

The quick search field allows you to search either by ticket number, clients, or keywords. The result applies a filter on the ticket grid according to your search criteria.

> *Note: You can directly access the ticket interface from the quick search by typing the ticket number and adding the "#" symbol in front of it. For example, #12345678.*

5.3.3 Performing an advanced search in the tickets

You can perform an advanced search of your tickets directly from the "Tickets Grid" tab by pressing the "Advanced Search" button.

C2 offers two search options in the Advanced Search section:

1. You can select a search template from the "Select a search template" field. The available templates come from your custom search templates if you have previously created any or from public templates provided by your administrators.
2. You can perform a search using the default fields that are available in this section.

After performing a search, you can access the results directly in the ticket grid under the preselected columns.

> *Note: When you select a search template, the conditions and values are automatically displayed. However, the default values entered under the conditions can be changed at any time.*

5.4 Viewing all clients

The "Clients" menu from the menu bar allows you to display the grid containing the complete list of all clients in your C2 instance.

To view the contents of a client, select its number or double-click on the desired item to open the form 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: Your access to the features of this menu is determined by your permissions, for more details please refer to your administrators.*

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 letting you 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 your grid templates, these must be preconfigured via your profile menu. For more information, refer to section 5.9.5.5 Grid.*

Filtering Your Clients

You can apply filters on the grid to obtain more restricted 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 your filters, these must be preconfigured **via your profile menu. For more information, refer to section** 5.9.5.3 Filters.*

5.5 Accessing the CMDB and Knowledge Base

The “CMDB” menu allows you to access two distinct sections:

- Knowledge base: allows you to reach the knowledge base menu to access and manage the knowledge base articles.
- CMDB: Allows you to access the different CMDBs to manage your configuration items (CIs).

5.5.1 Knowledge Base

The Knowledge Base allows you to maintain articles and troubleshooting tips to assist you in your ticket’s resolution. These can be used from the ticket tab or the CMDB menu.

You can add articles to the Knowledge Base, a new article has the status “Pending Approval” under the “Availability” field. This field allows you to manage the approval of articles in the Knowledge Base before they are made public or private.

To make a knowledge base article available on the portal, you must give it a public availability.

> *Note: To approve, create, modify, or view knowledge articles you must have the required permissions, for more details please refer to your administrators.*

5.5.2 CMDB

This section of the “CMDB” menu allows you to view, search and create Configuration Items (CIs). You can also see the tickets that are associated with a CI.

When creating a CI, you must select a CI category which defines the list of “fields” attributes to fill in and a folder to classify it.

You can perform a quick search, where the search is done on the “CI number” and “CI name” fields.

You can also perform a complete search, which allows you to search in all fields including custom fields. To optimize your search time, you can add additional CIs search fields.

> *Note: To create, modify or view configuration items (Cis), you must have the appropriate permissions, for more details please refer to your administrators.*

5.6 Chatting between resources and clients

The "Chat Bubble" icon accessible from the menu bar allows you to chat with other resources within C2. It also allows you to see the list and status of the resources you can chat with.

You can also create chat channels to chat with a group or multiples resources at once.

If the options are configured by your administrators, the chat may also be available to clients through the portal.

5.6.1 Chatting directly with a resource

When you access the "Chat Bubble," the "Resource" toggle button is selected by default. This button allows you to access the list of resources available for chat, view their status, search through the list, and open a chat window directly with a resource.

To search for a resource, you must type the characters associated with the name of the resource you are looking for in the "Search…" field, the list of resources filters the results in real time.

To chat directly with a resource, you must click on the name of the resource from the resource list, a chat window opens allowing you to chat with the resource and share attached files.

> *Note: You can move, resize, minimize, and close the chat window at any time.*

5.6.2 Responding to client chats

The "Ticket" toggle button aggregates the chats generated when a client enters a message from the "chat bubble" in the portal. A ticket will also be automatically created, and the following scenarios can occur:

- If you are available to respond on the chat, you have the option to respond directly to the client by selecting the chat associated with the ticket, the chat

window opens and the ticket is automatically assigned to you.
- If a resource other than you is available and replies to the client, the ticket will be assigned to the person who replied.
- If no resource is available to respond to the client's chat, then an automatic message will be sent to the client.

You can also use the "Search..." field to filter the list of chats displayed, to do this you must type in the characters found in either the ticket number, the name of the request or in the text typed by the client, the chat list filters the results in real time.

> *Note: For this function to be active, the configurations must have been applied by your administrators.*

5.6.3 Using chat channels

The "# Channels" toggle button allows you to create and access chat channels to chat with multiple resources from the same chat window.

To create a new chat channel, you must press "+ Create a new channel," a pop-up window appears where you must name the channel and add either resources or groups to it.

You can also use the "Search..." field to filter the list of channels displayed, to do this you must type the characters that are found in the channel name, the list of channels filters the results in real time.

5.7 Viewing notifications

The "Notifications Bell" icon accessible from the menu bar allows you to view your notification history, new emails, notes, and tasks that have been assigned to you. You can track new updates on your tickets from this menu.

5.8 Using the help functions

The "Question Mark" icon accessible from the menu bar allows you to activate the help functions to provide you with a description of some of C2's features.

To activate it, you must press the "Question Mark" icon and point the cursor at a label about which you want more information. To deactivate this function, press the "Question Mark" icon again.

For example: By pointing the cursor on "Groups" in the ticket grid, you have access to an information bubble displaying a description of the "Groups" functionality.

5.9 Using the profile menu

The application's profile menu is personal for each user, this section contains the options associated to this menu.

5.9.1 Dark theme

This button allows you to toggle between standard and dark theme display.

5.9.2 Availability Status

This section of your profile menu allows you to select your availability status as a resource.

The availability status has a direct impact on the management and reception of tickets.

- For example, if your availability status is set to Unavailable, tickets cannot be assigned to you.

Your colleagues can also see your availability status from the C2 chat bubble.

> *Note: The list of available statuses is determined by your administrators.*

5.9.3 My activities

This menu opens in a new tab and displays your activity history as a resource in read-only. This view is personal to you and cannot be exported.

You can filter the entries by using the toggle button in the tab header, the available filters are Ticket, Client, CI, Enterprise, Update, Note, Email and Time entry.

5.9.4 Timesheet

This menu opens in a new tab and displays a calendar view allowing you to fill in your time using timesheets. Each timesheet represents a length of time spent processing a ticket.

You can display the calendar in four views: “Month,” “Week,” “Day” or “Summary.” The “Summary” view allows you to see a summary of your tasks one after the other, one week at a time.

Every Timesheet entry you made through the timer of a ticket or task is visible in your timesheet.

> *Note: Depending on your permissions, you may be able to complete another resource’s timesheet.*

5.9.4.1 Adding a new timesheet entry

To add a new entry, you can press the “Add” button or double-click on a time frame in the current view, that allows you to fill in the following fields in the “Timesheet” pop-up window:

Field	Description
Ticket	Allows you to search and select the ticket that must be associated to this timesheet.
Banked Hours	Allows you to associate the ticket to Banked Hours from the drop-down menu. The hours entered in the timesheet will be debited from the associated Banked Hours.
Remaining Hours	Displays the number of hours remaining in the selected Banked Hours. *Note: This field remains empty if no Banked Hours is selected.*
Start	This field is required. Allows you to enter the date and time that marks the beginning of the calculation of the processing time for this time entry.

End	This field is required. Allows you to enter the date and time that marks the end of the processing time calculation for this time entry.
Duration	This field is required. If you enter a Start and End time, this field displays the calculation in hours and minutes that separates the end date from the start date. You can also enter the time entry manually here, using the format HH:MM:SS. *Note: The duration is limited to a maximum of 24 hours.*
Comments	This field is required. You must enter a comment to describe this time entry.

5.9.4.2Modifying a timesheet

You can edit and manipulate timesheets from your calendar to change their date or make a copy.

To modify a timesheet, select the desired timesheet to access its interface.

You can also move a timesheet to another day quickly, to do this you must select the timesheet and drag and drop on the targeted date.

To make a copy of a timesheet, you must select the desired timesheet and drag and drop it by holding the "SHIFT" key of your keyboard on the targeted date.

5.9.5 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.

5.9.5.1 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.

5.9.5.2 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.*

5.9.5.3 Filters

This menu lets you create filters to make them available in the side pane of the appropriate menus according to their target. The targets are Tickets, CIs, Clients, and Enterprises.

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

To create a new filter, press the "Create" button and fill in the following fields:

General information

Field	Description
Active	By default, this field is set to yes. Through this field, you can check whether this filter 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 and those available in the actions. In addition, the Tickets, CIs, and Clients targets have additional fields to fill in. *Note: To use certain filters, you must have the necessary permissions, e.g., filters with the "Enterprise" target are only accessible via the management menus. For further details, please refer to your administrators.*
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.*

Additional fields for Tickets

Field	Description
Ticket type	If the filter concerns only one ticket type, it is more efficient to indicate this in this section. If multiple ticket types are necessary, you must specify 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.

Additional fields for CIs

Field	Description
CMDB Type	If the filter applies to only one CMDB type, you can specify it in this section for better performance. If multiple CMDB types are required, you must specify this in the condition.

Additional fields for Clients

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

Conditions

This section of the filter allows you to define the conditions and logical operators required to apply the filter.

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

5.9.5.4 Search

This menu allows you to create custom search templates according to the conditions you desire. You can use your search templates in the "Advanced Search" of the ticket grid, in the dashboards and in the search menu bar.

To create a new search template, press the "Create" button and fill in the appropriate fields.

> *Note: The fields to be filled in to create a search template are the same as for a filter, except for the Grid Template field. For more details, refer to section: 5.9.5.3 Filters.*

5.9.5.5 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.

General information

Field	Description
Active	By default, this field is set to 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 determines where this grid pattern is available. *Note: When you select the CI target, the additional field "CMDB Type" is visible, allowing you to select a CMDB 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

description	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.*
Items per page	Selects the number of items to display per page: 10, 25, 50, 75, and 100.

5.9.5.6 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 are 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 or not 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, enterprises, 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:

- No one
- Telephone
- Email
- Other
- Define no defects

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

The “Notification when assigned” 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 customer” 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 have typed in the quick search field.
- Filter grid by status: This option allows you to choose when you access the ticket grid, whether you want it to display only “open,” “closed,” “assigned to me” tickets, or a combination of the three.
- Filter grid by: This option allows you to determine the default sort order when you access the ticket grid by either “Customer” or “Company.”

The “Form sections” option allows you to determine which sections of a ticket should be open by default and their order in which they are displayed.

CIs Section

This section allows you to add additional fields in which 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 put back 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 displayed during a search.

The “Form sections” option allows you to determine which sections of a CI should be open by default and their display order.

5.9.6 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 when changes are made to the Knowledge Base. You can remove your subscription at any time.

5.9.7 Change the display language

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

> *Note: The option to switch the interface between English and French is only available if both languages have been configured by your administrators.*

5.9.8 Switching to the portal

This option allows you to switch from the Application interface to the Portal interface.

5.9.9 Logging out

This option allows you to log out of your session in the C2 ITSM application. The system automatically logs out your session after a continuous period of inactivity.

5.10 Quickly create a new ticket

You can quickly create a new ticket in two ways:

1. The first way is using the "New ticket" button represented by a "+" icon from the menu bar.

   After pressing the "New ticket" button, you need to select a customer then a request, the proposed requests are filtered according to the customer's service catalog select.
2. The second way to create a new ticket is slightly longer than the first, you must start by pressing the arrow next to the "New ticket" button and select the ticket type.

You must then fill in the customer, catalog, category, service, and request fields directly in the ticket interface.

6. APPENDIX A

6.1 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	Example 2: Parent operator AND
File = “Service center” AND Status = “In progress” AND Status report = “In progress”	File = “Service center” OR Status = “In progress” OR Status report = “In progress”
OR	AND
File = “Development” AND Status = “Investigation”	File = “Development” OR Status = “Investigation”

6.2 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 select only the 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.

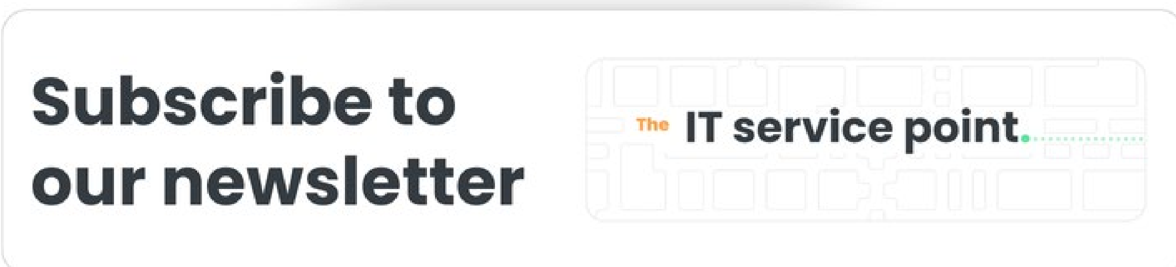
- Between: This operator allows you to select two dates or two times to find the items that exist between these dates or times. The dates/times selected are fixed in time, e.g., January 4, 2022, 1:30 p.m.
- Day of Week: This operator tests whether the date selected is a weekday (Monday to Friday).
- 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 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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