censhare

Instructions for using the

censhare | ecosphere Tracker

version 2019.1 en
censhare AG, Munich
2019, February

censhare ecosphere

| Username |

| Password |

| **LOGIN** |

Forgot password?

📖 Tracker Guide

**turn complexity
into value**

Overview of Chapters

Introduction to the censhare | ecosphere Tracker

The censhare | ecosphere Tracker is a system used to report existing problems to the censhare Service Desk. Even downloading current censhare components is possible.
Misbehaviours or problems unsolvable for customers are not reported via email or by phone, but by ticket.
In exceptional cases we are available via email oder by phone for our customers, of course.

A ticket represents a request to censhare Service Desk.

For every request a separate ticket should be created. This is necessary for the staff of censhare Service Desk to be able to search in old tickets. Tickets have to be classified - in view of the urgency of problem - in different priority levels.
The tickets are processed by priority level.
Information: a rating which is too high (e.g. critical for production) can lead to billing of the ticket.

To use the censhare | ecosphere Tracker on your computer (PC or Mac) you have to do several things.
At the beginning of this guide we explain what you have to do. These things have to be done only once.
Furthermore we explain the main features, so you can create tickets and use the tracker by your own.

How to access the censhare Tracker
Accessing the Tracker system is possible through censhare Web or censhare Client from version 2019.1

- through censhare Web

Currently the folllowing web browsers are supported for censhare Web:
Windows 7, 8.1, 10
• Internet Explorer 11
• Chrome (current version)
- (Supporting Microsoft Edge is under construction)

macOS Sierra
• Safari (current version)
• Chrome (current version)

iOS (current version) on iPad Air 2 respectively iPad mini 4 or later*
• Mobile Safari (current version)

Android (current version) on Nexus 9 tablet*
• Chrome for Android (current version)

* Other devices and smartphones currently are not supported
Also see https://ecosphere.censhare.com/en/documentation/system-administration/article/2645946

censhare Web is a web application running inside a browser.
In your browser please open the address   https://tracker.censhare.com

censhare Client - see page 15

The login mask
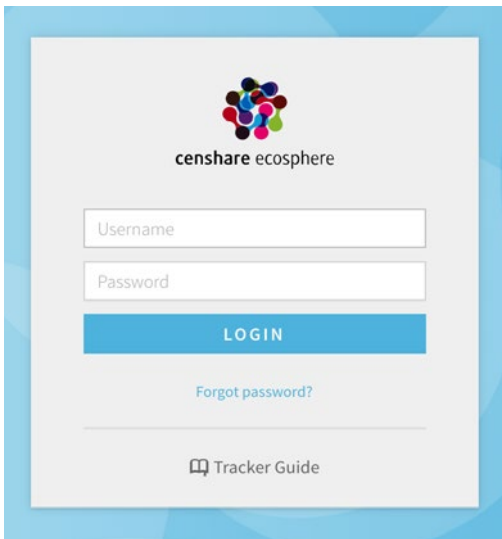
Please enter your user name and password.

Afterwards, confirm by clicking 'Login'.
If you should have forgotten your password,
you can request it here.
An e-mail will be sent to your deposited address.
The Tracker manual is also available here.

Now you reach the Dashboard.
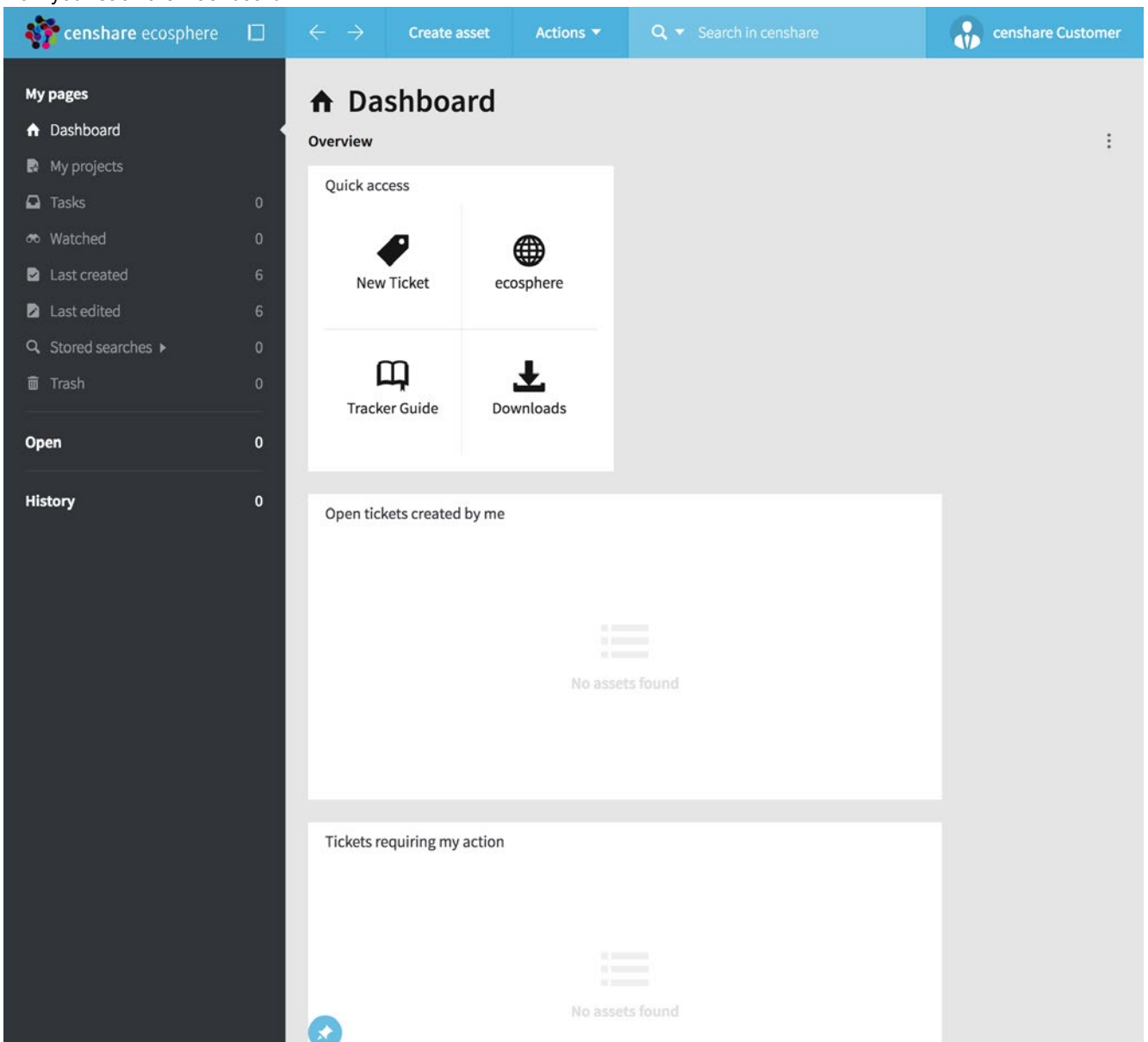
Creating your own profile image
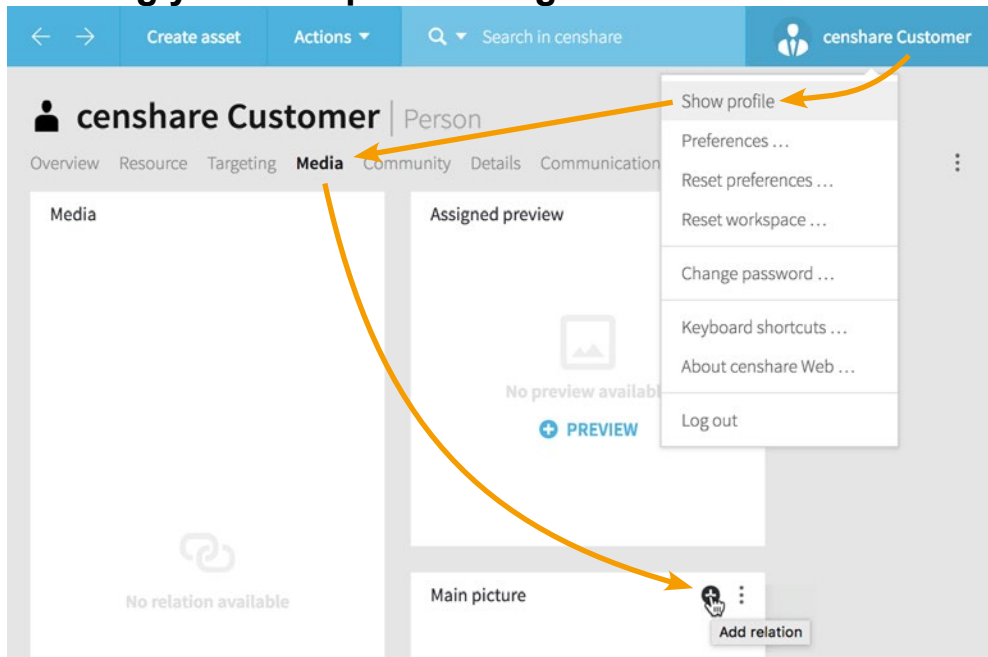
Open the menu
'Show profile'. Now your
person asset is displayed.

Here, change to
the 'Media' tab.

Move your mouse pointer
over the widget 'Main picture'
thus the plus button
will be displayed.

Now click onto the plus
to create a relation
to your desired image.
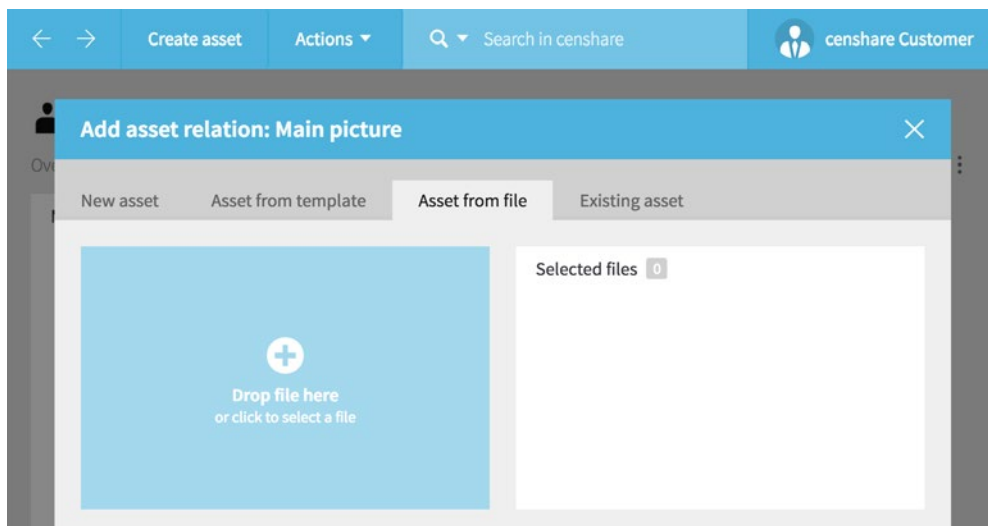
Either you use
'Asset from file'
to import an image.
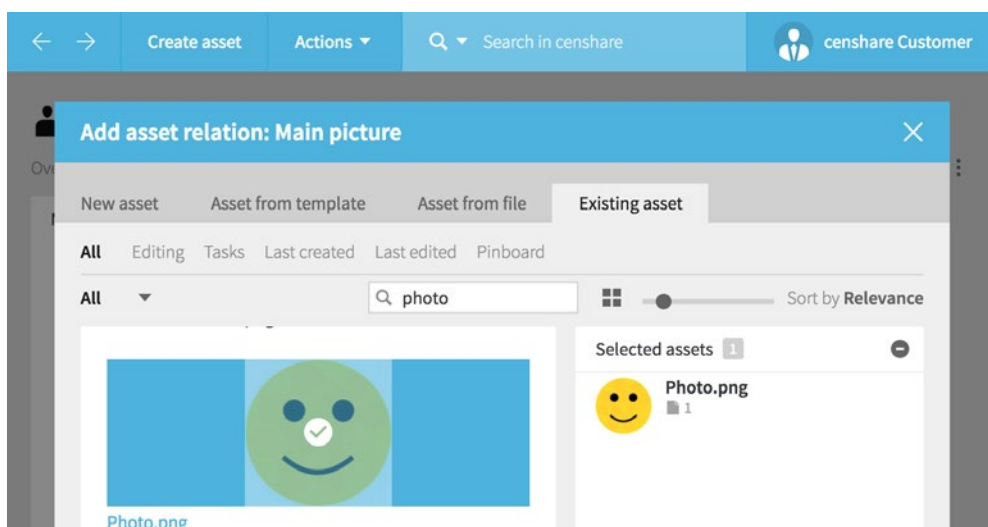
Or you use 'Existing asset',
which you can find
by using the search
within the dialogue.

Your customized profile should look like this comparingly:

The Dashboard

The Dashboard already shown in the begining is the control centre with the most important items as an overview.

Here you find shortcuts to
- New Ticket   Your new ticket is created here
- ecosphere   In a new browser tab https://ecosphere.censhare.com/ will be opened
- Tracker Guide   In a new browser tab this guide will be opened as a PDF directly
- Downloads   In a new browser tab the ecosphere download center will be opened

as well as
'Open tickets created by me'
'Tickets requiring my action'
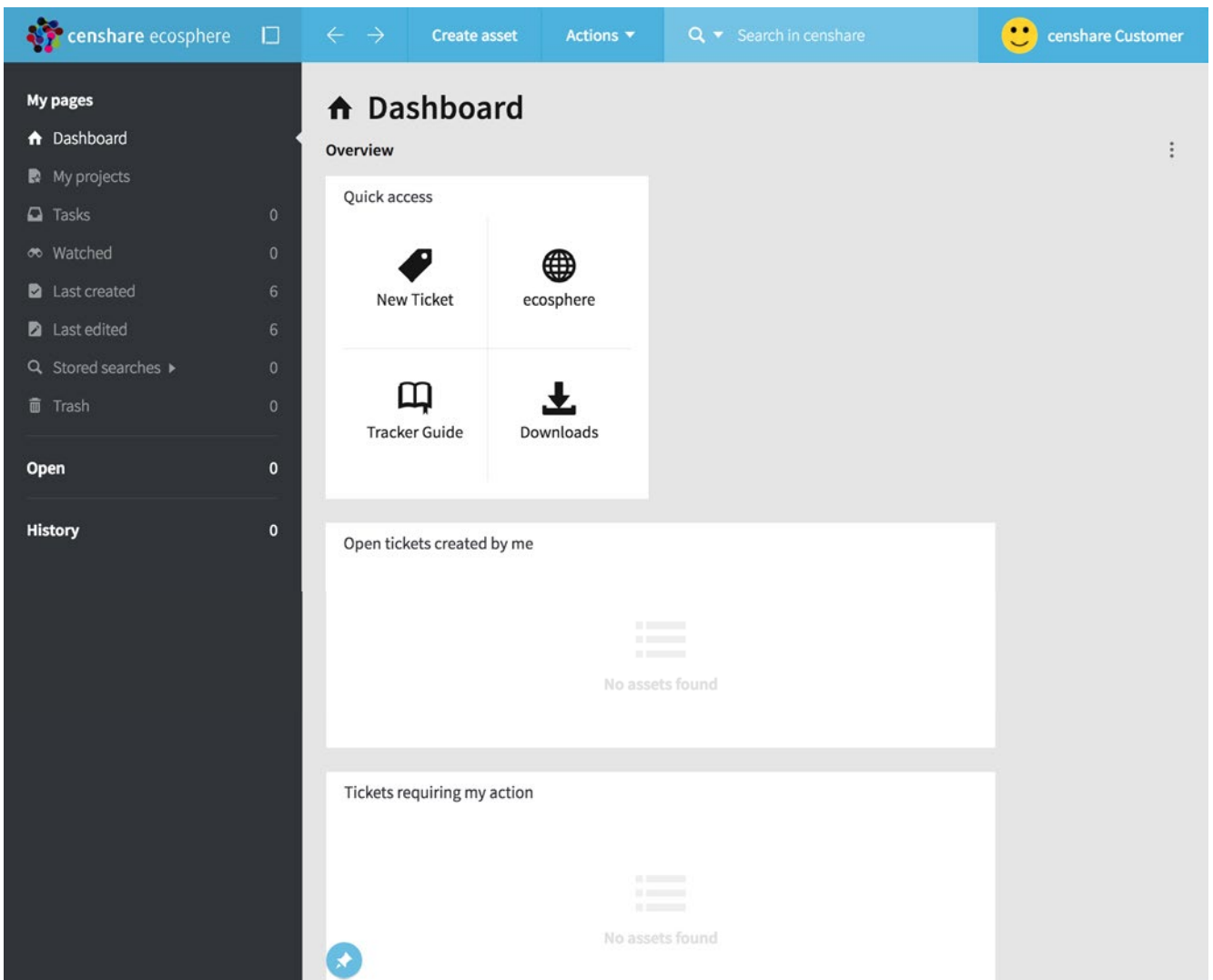
Opening project data, project/ticket structure

Your project files can be found in 'My projects'.
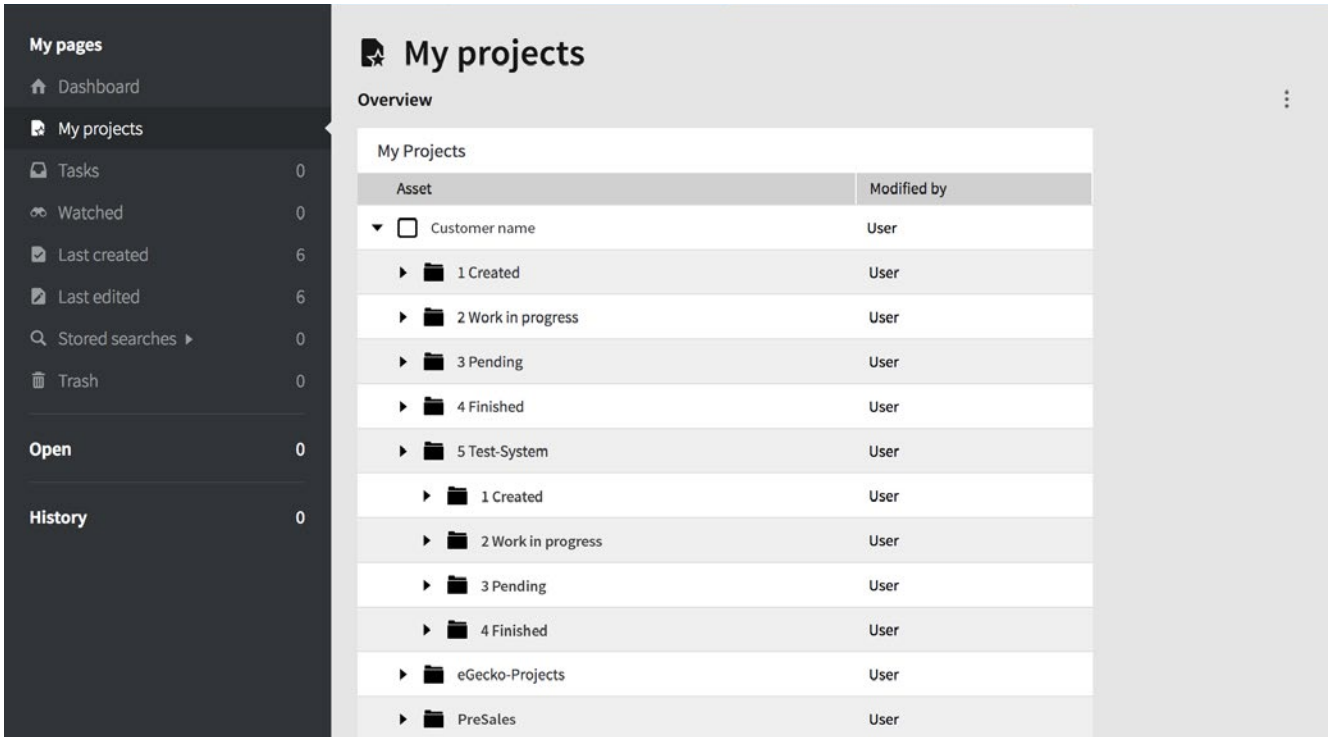
Under your project you will find your tickets. The assignment of tickets to search categories is automated.
(the small grey arrow in front of the name indicates a folder structure)

Every project has a minimum of five subfolders.
The first four folders show the tickets of the productive environment sorted by their status.
In folder '5 Test-System' the tickets of the test environment are displayed by their status.

Creating a new ticket
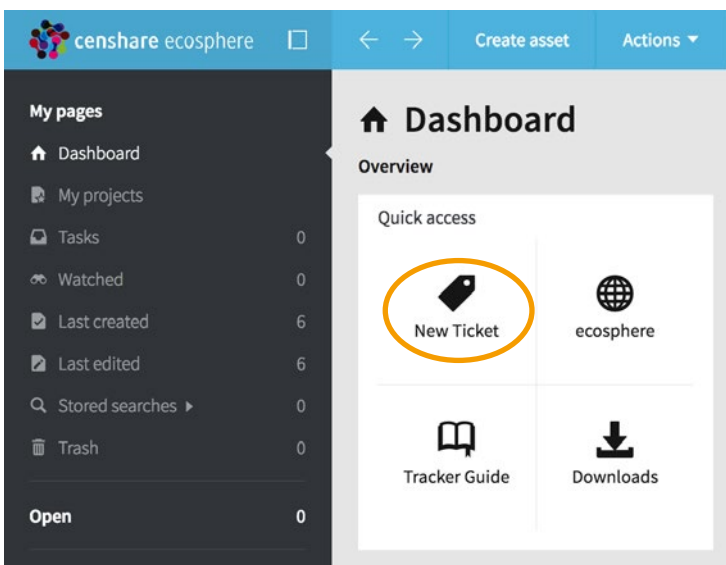
On the Dashboard in 'Quick access'
find the button to create a new ticket.
A click onto 'New Ticket' opens the dialogue.

The ticket creation dialogue

Tickets are 'normal' censhare assets. The special feature: We only work with the meta data of the ticket asset.
To work with an existing ticket, just double click on it.

Integrated help / tooltip: The entry fields are equipped with notes.
Mandatory fields are highlighted coloured (pastel yellow).

The fields of a ticket

1   Subject
   Beside the text 'Subject' please type in a short but clear description of the ticket.

2   System environment
   Please specify here if productive or test environment is affected.

3   Priority
   The incident priority of the ticket. See https://ecosphere.censhare.com/en/help-and-customer-service/article/3278198

4   Domain
   Users working with multiple domains here please select the domain in which the ticket shall be created.
   Later the correct billing in the regarding domain is depending on this setting.

5   Assigned to

On ticket creation the ticket is always set to *Service Desk*.

The further assignment of the ticket is performed by the *Service Desk*.

Attention: In the further processing of the ticket please always assign it to *Service Desk*.

Do not assign it to a specified support member, please.

This is the only way we can ensure the processing of your ticket, e.g. even if a colleague is ill.

ⓘ shows the unavailability of the selected workflow target. The ticket will be processed after the end date.

A 'production critical' ticket always should be assigned to *ServiceDesk* which will be shown by a hint.

6   Component and version

Please specify the affected component in the free-text field. e.g. Windows censhareClient 2019.1.1

7   External ID

A freely editable field for your own purpose

8   Your request

Here you describe your request/problem as detailed as possible.

By clicking 'OK', your ticket will be sent to the defined target in 'Assigned to' and an overview of the created ticket will be displayed to you. Every entry will be shown sorted and stating the author.

The last entry will appear topmost, the oldest at the very bottom.

To add a further entry to an existing ticket, click into the field 'Create new entry' within the opened ticket.
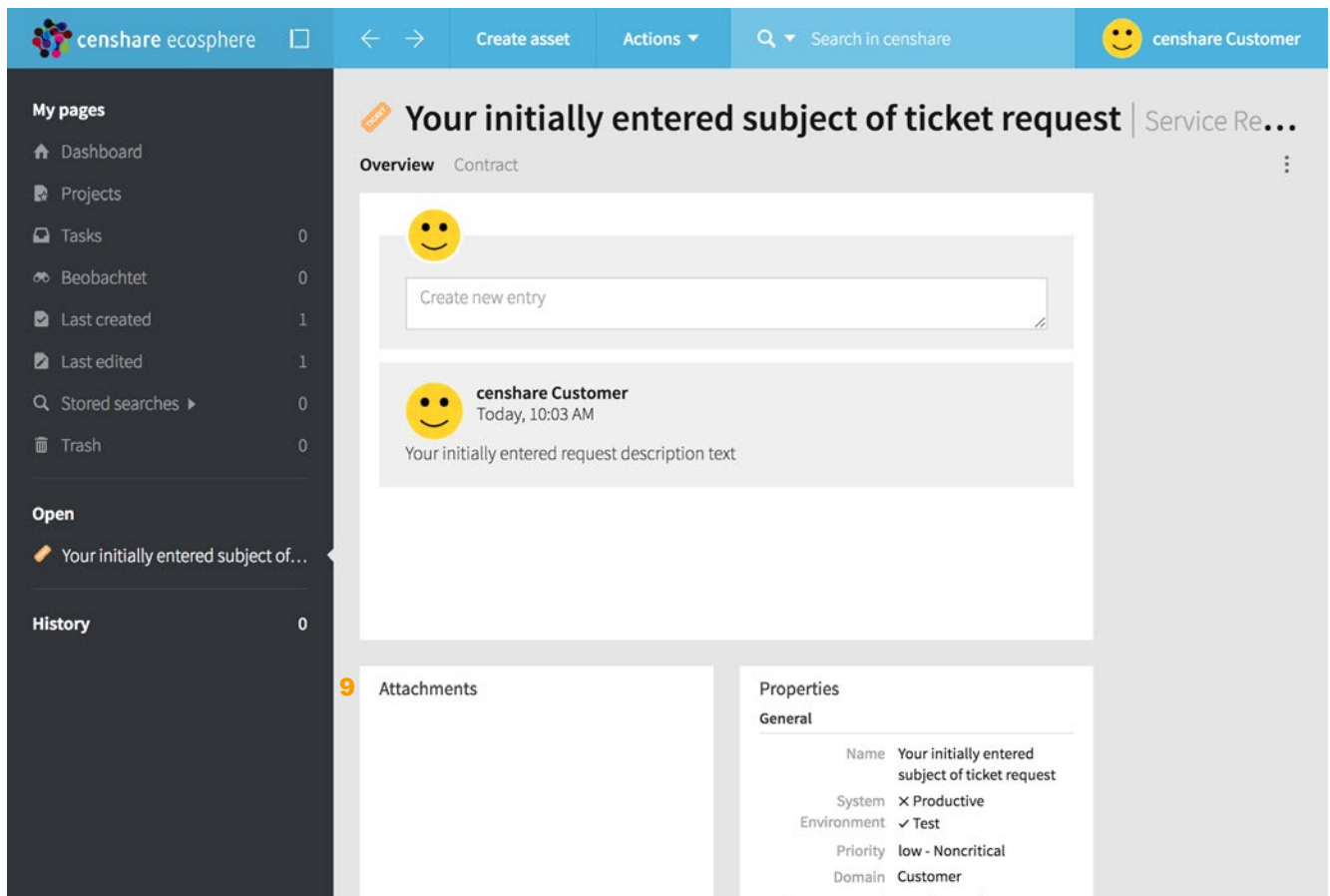
9   Attachments

Within the created ticket you can assign neccessary attachments in the widget (9) 'Attachments'.

Already existing attachments also are displayed in the widget 'Attachments'.
For every attachment - as far as the mouse pointer is onto the attachment -
exist icons 'Remove relation', 'Preview' and 'Context menu' at the right.

Creation of attachments

a) New attachments (even multiple) can be drawn directly from your desktop into the ticket widget 'Attachments'.
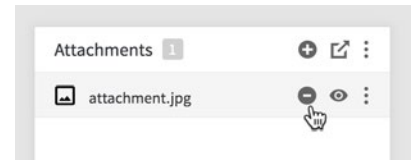   Afterwards the dialogue 'File upload' opens which can be confirmed by clicking 'UPLOAD'.
   If only 'OK' should be available as a confirmation, the files are duplicates and an upload
   will not take place. Normally the content of this dialogue can be ignored. Only the confirmation is neccessary.
   After uploading the attachments are automatically assigned to the ticket within the widget 'Attachments'.
b) By clicking onto the '+' symbol beside 'Attachments' the dialogue 'Add asset relation: Assignments' is opened.
   Here an attachment can be created by drag&drop or by selection.

If the ticket which needs to get an attachment is not yet opened - the ticket must be openend first.
Already created tickets can be found in the initially described dashboard in 'Open tickets created by me'
and 'Tickets requiring my action' or within 'My projects'. Tickets are opened by double click.

In this way *Service Desk* can access the delivered files and the ticket can be processed faster.

Download of attachments

Attachments can be downloaded using the 'Context menu' of a single attachment.
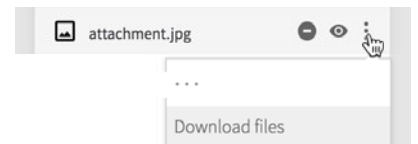
Hints

If a file is dropped on the horizontal blue bar at the top it will be imported but it will not be assigned to the ticket.
Thus please generally use the widget 'Attachments' to create these.
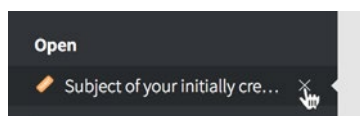
A newly created ticket can be found below the side menu 'Open'.
Here this means 'openend read only'. To get rid of the ticket in this location
you can close it by clicking the 'x' at the right hand.
The 'x' only appears while the mouse is located over the line.

Additionally, tickets can be found in the menu items 'Projects', 'Tasks', 'Last created', 'Last edited'
or in the Dashboard within the widgets 'Open tickets created by me' and 'Tickets requiring my action'.

10 Contract

A click on 'Contract' shows the main contract data.
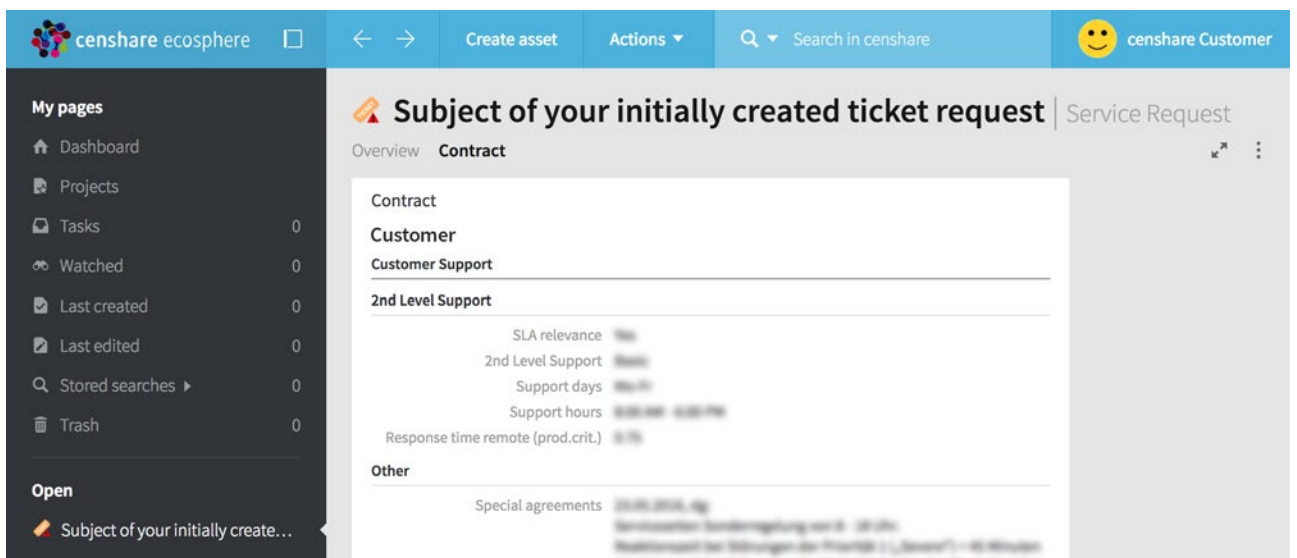
The fields 'Step' and 'Assigned to'

Within the 'create ticket' dialogue the field 'Step' is not existing. Here generally the step 'Created' is predefined.
You can find the fields 'Step' and 'Assigned to' on creation of a further ticket entry.
Here the fields 'Step' and 'Assigned to' only appear if you click into the text area 'Create new entry'.
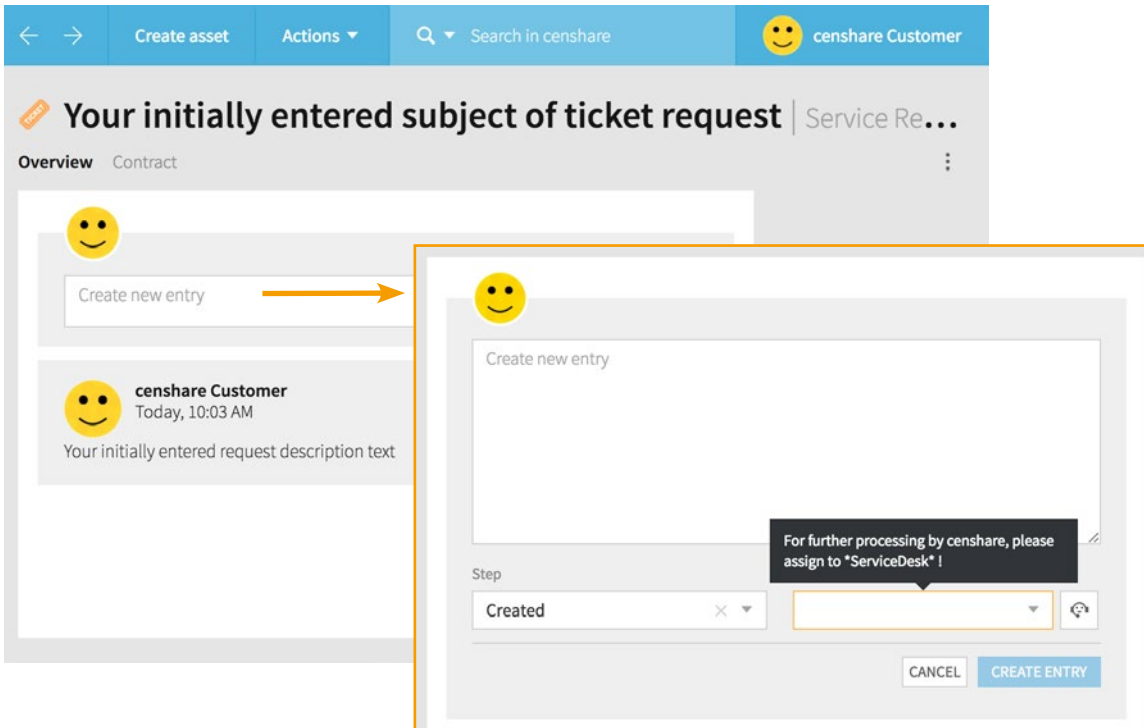
Another option to reach the fields 'Step' and 'Assigned to',
e.g. if a ticket is on the Dashboard, is to click on the icon 'Assigned to'.
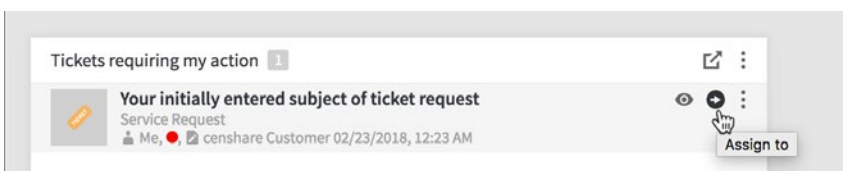
This opens the dialogue 'Edit workflow'
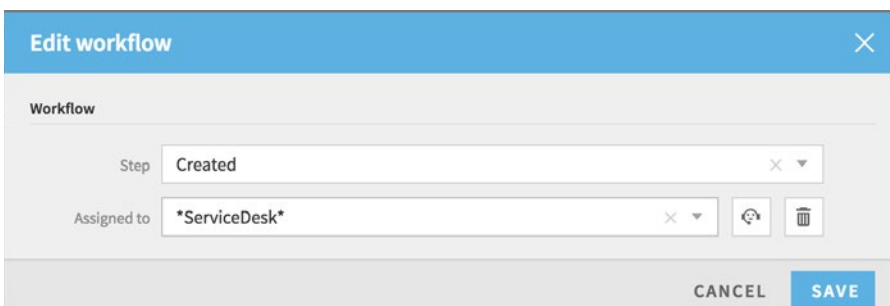
A click in the desired field opens the corresponding dropdown menu.
Only after a click onto 'SAVE' the changes will be applied to the ticket.

Using the 'Workflow-Step' field

Currently these steps are available:

Created
Internal analysis
Work in progress
in planning
Waiting for information
Implementation/Test
Work in progress customer
Finished

Created
The ticket is created and assigned to a target. By default to *Service Desk*.
Meaning: The ticket is waiting for processing.

Internal analysis
The ticket has been assigned to a censhare specialist to categorize and analyze the content.

Work in progress
The ticket is in progress at a censhare specialist to solve it.

In planning
Tickets without fixed execution date are in queue and handled as soon as possible.
Tickets with a fixed execution date are handled until deadline.
Tasks which are time-phased to the next update / maintenance window in agreement with all involved.

Waiting for information
The ticket has led to a 'Development Ticket' which is in work at our in-house development department.
New information will be communicated to the customer within his support ticket as soon as available.
Meaning:
The user whom the ticket is assigned to is waiting for information from the censhare development department.

Implementation/Test
A problem or customizing topic can be solved by a fix or a change. If only the customer or project manager is able to confirm the correct function, the ticket gets this status.
The ticket will be assigned to the project manager or customer, because only these are generally able to process the implementation and perform the test.

> **Example for Implementation/Test**
> - a problem can be solved by a patch within db-schema.xml
> - a new module was installed and the function may only be verified the next day

Work in progress customer
The ticket has been taken by a customer or was assigned to him for further processing.
The censhare specialists are no longer working on the ticket and are waiting for a customer's reply to continue with the work on the ticket.

Finished
The problem was solved. The solution was agreed by the customer and censhare. The ticket is closed.

AUTOMATIC TICKET CLOSING
We close tickets automatically which are not modified within the last 6 months and do not have an assigned open development task. Tickets with an assigned development task are usually set to workfow step 'Waiting for information' and the workflow target to 'zzPendingTask'. This combination is excluded from automatic closure.

If you want to prevent the automatic closure of a ticket, you can perform one of the following actions:
- Set the workflow step to 'in planning'.
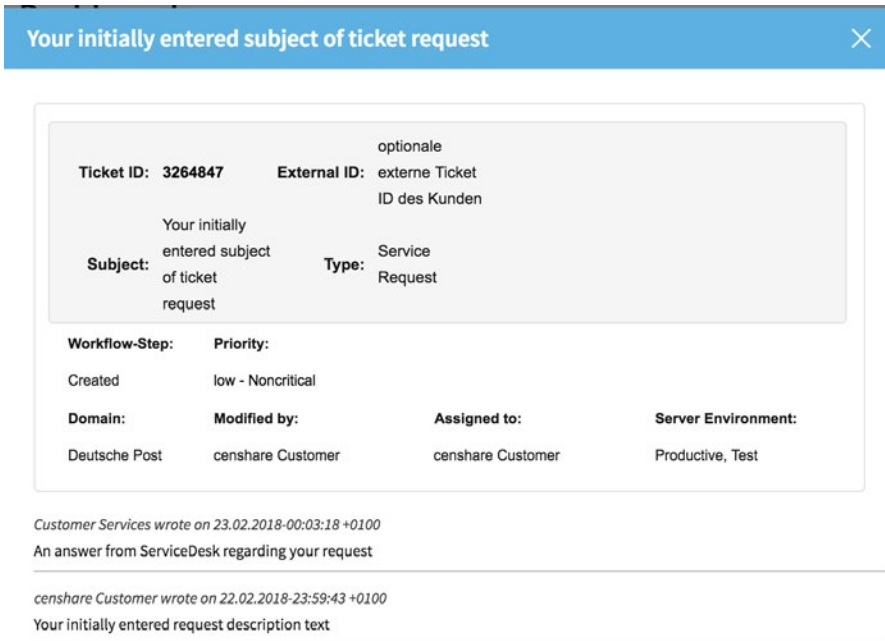- Modify the ticket to set a current modification date ('Modified at').
This will prevent current treatment, but the ticket will be closed 6 months later if it is not modified again.

The ticket preview

If you have a ticket on your dashboard you can open the ticket preview by clicking onte the icon 'Preview'.
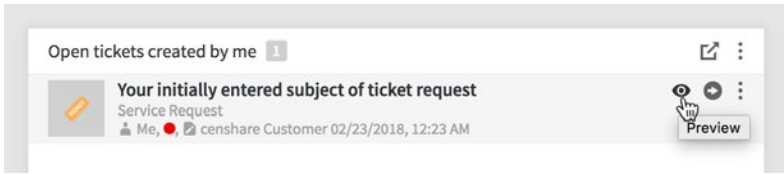
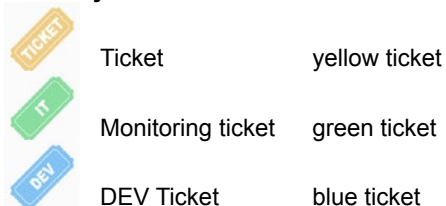The ticket preview dialogue will appear.

Tickets in progress

Information about email notification on ticket assignment:
- In the email text the complete history is displayed
- Email notifications are sent in the following cases to the:
    ticket creator on first version of the ticket, regardless of the workflow target on save
    workflow target on a change of the 'Workflow target' field
    workflow target on additional ticket entries
    workflow target on a change of the 'Priority' field
- You cannot reply to this email - respond only by censhare | ecosphere Tracker ticket, please.

Ticket symbols

 Ticket   yellow ticket

 Monitoring ticket   green ticket

 DEV Ticket   blue ticket

Coloured warning triangles reflect the choosen priority of the ticket.

 Red indicates the priority 'critical - critical for production'

 Yellow indicates the priority 'high - Workaround possible'
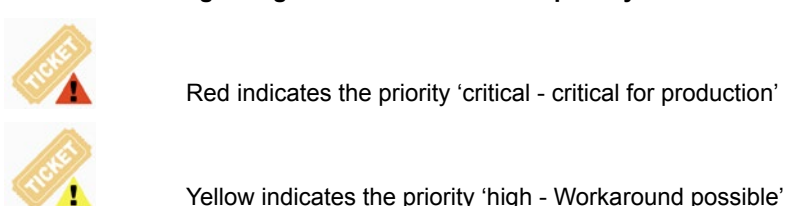
Notes

How to reach the censhare Tracker
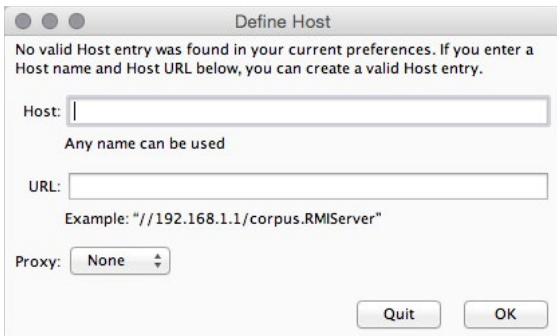
-by censhareClient

The censhareClient is a stand-alone java program, which is running under Mac OS and windows.
The censhareClient is available in a dark and a bright look&feel (color of the GUI-version).

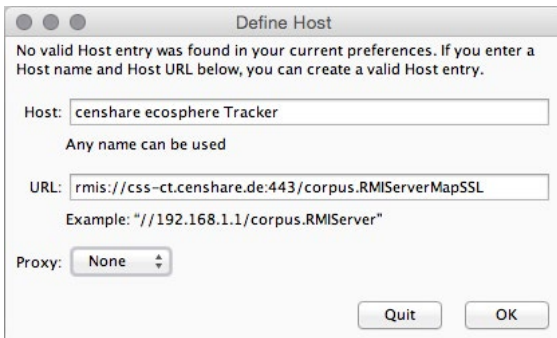At the beginning the hosts.xml must be configured.

Configuring your hosts.xml

censhareClient (without existing hosts.xml)

If you do not yet have a hosts.xml,
censhareClient will start with a 'Define Host' dialogue.
The URL within the hosts.xml enables the tracker access.

(Link to: with hosts.xml | direct editing)

Here please define as seen in the below example

```
Host: censhare ecosphere Tracker
URL: rmis://css-ct.censhare.de:443/corpus.RMIServerMapSSL
```

After entering the connection parameters confirm with ok.

Following is the login dialogue.
The server is preselected, as it is the only entry.
Enter your username and password, please.

Afterwards please confirm by clicking 'Online'.

Within the next article please respect the point **'deactivate virtual volume'**.

censhareClient (with existing hosts.xml)

Using the menu 'File/Preferences/Servers' you setup the hosts.xml.
The URL within the hosts.xml enables the tracker access.
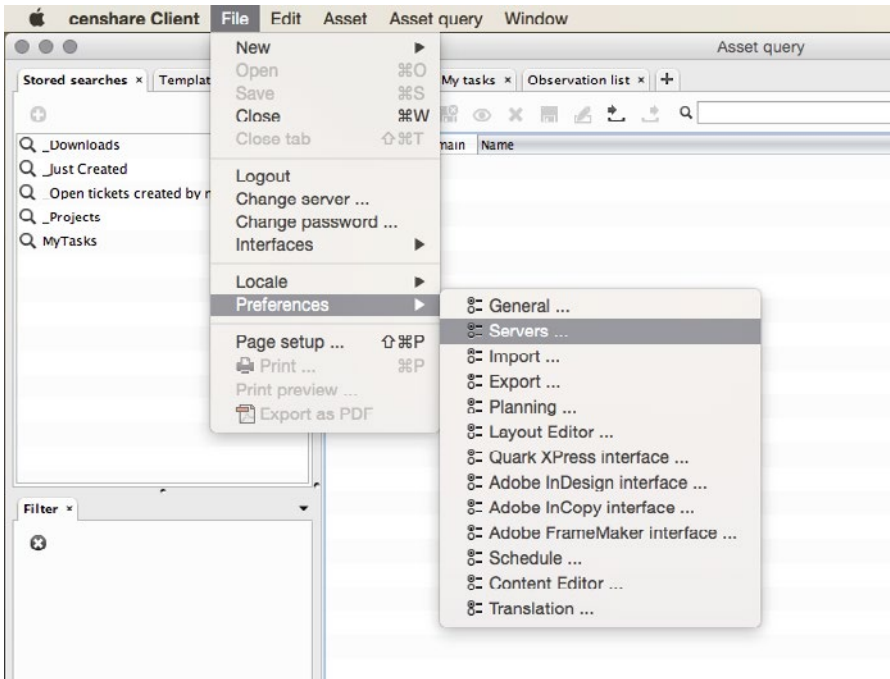
Accessing the 'Servers' menu

Here please define following the below example

```
Name: censhare ecosphere Tracker
URL: rmis://css-ct.censhare.de:443/corpus.RMIServerMapSSL
Virtual volume: deactivate
```
A proxy definition is possible, also. Finally confirm the dialogue with OK.
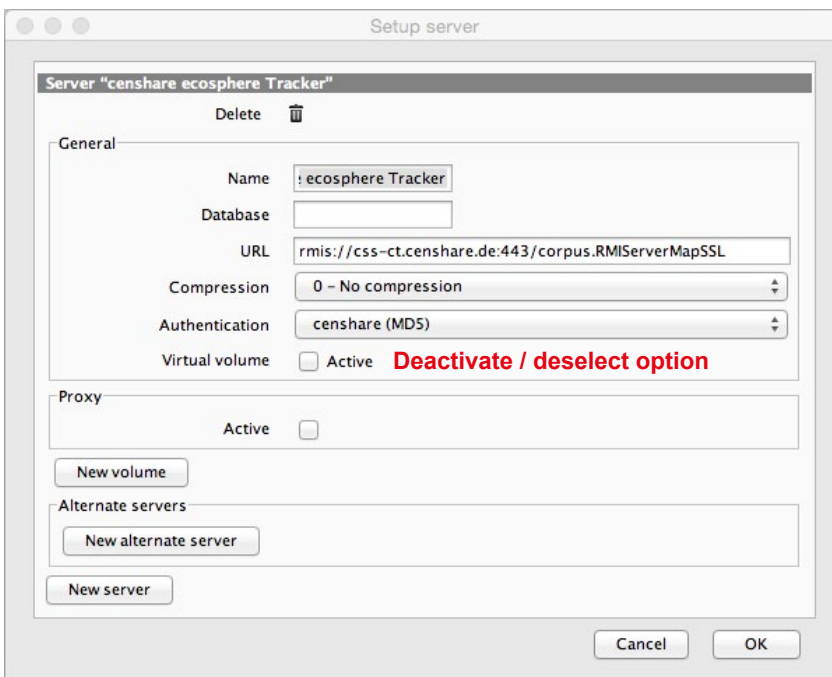
Deactivate virtual volume
An additional parameter
<censhare-vfs use="0"/> is needed
(virtual volume deactivated).
If you do not define this new
parameter in your hosts.xml
(depending from local setup)
an additional volume could appear
(the name equals the host name).
Or you could receive an error
message of a missing extension.

The configuration of hosts.xml within censhareClient

censhareClient (direct editing of hosts.xml)

Find the hosts.xml here:

OS X: /Users/<User>/Library/Preferences/censhare/v4/

Windows: C:\Users\<User>\censhare\v4\

Older Windows: C:\Documents and Setting\<User>\censhare\v4\

For a secure connection by ssl use:

```
<?xml version="1.0" encoding="UTF-8"?>
<root>
  <hosts>
    <host name="censhare ecosphere Tracker" url="rmis://css-ct.censhare.de:443/corpus.RMIServerMapSSL"
compressionlevel="3">
    <censhare-vfs use="0"/>
    </host>
 </hosts>
</root>
```

For a secure connection by ssl and HTTP proxy use:

```
<?xml version="1.0" encoding="UTF-8"?>
<root>
  <hosts>
    <host name="censhare ecosphere Tracker" url="rmis://css-ct.censhare.de:443/corpus.RMIServerMapSSL"
compressionlevel="3">
    <censhare-vfs use="0"/>
    <proxy use="1" port="8080" host="proxy.mycompany.com" type="http" username="domain\win-user-name"
authentication-required="0"/>
    </host>
 </hosts>
</root>
```

Note for automatic software distribution
You can create the hosts.xml in any text editor with the content shown above and provide it to the upper mentioned target directories automatically.

Opening the project files
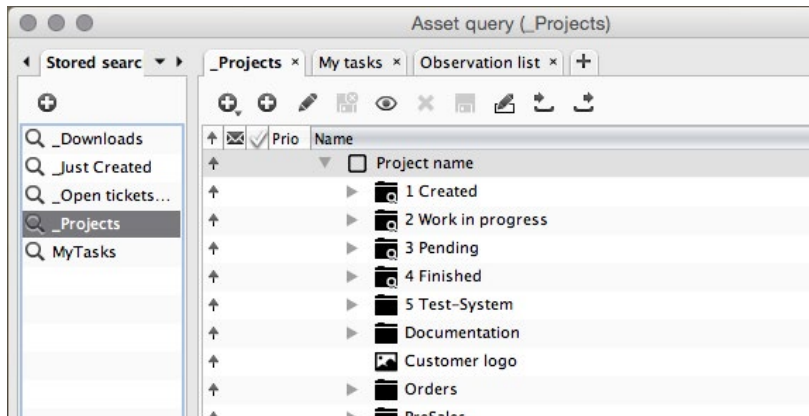
Your project files are found
in 'Stored searches'.

Projects-/ticket structure

Under your project you find your tickets. The assignment of tickets to search categories is automated.
(the small grey arrow in front of the name is labelling a folder structure).

Every project has a minimum of five subfolders.
The first four folders store the tickets of the productive environment sorted by their status.
In folder „5 Test-System" the tickets of the test environment are stored by their status.
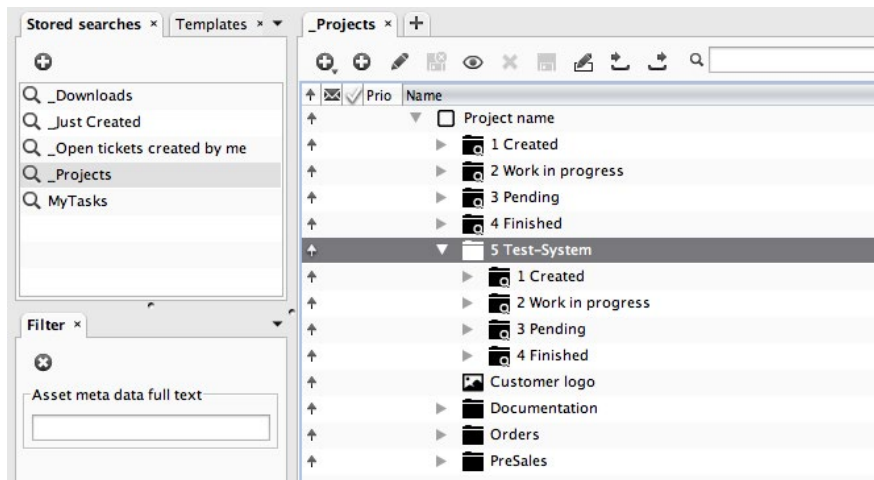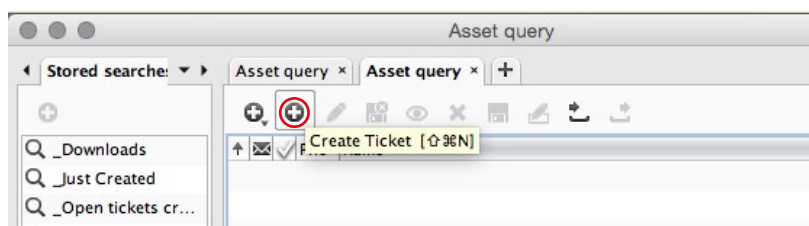

Project folder with ticket structure

Creating a new ticket

In the censhareClient toolbar click on the right '+' symbol.
On java clients once a dialog will appear on creation or modification of a ticket to create the local censhare folder.

A ticket

Tickets are 'normal' censhare assets. The special feature: We only work with the meta datas of the ticket-asset.

To work with a present ticket in censhare- or Web-Client, just double click it.
You also may click on it once and use the action 'Edit Meta Data'.
Or using the censhare-Client, you can utilize the shortcut ⌘+E on Apple as well as Strg+E on PC.

Integrated help / tooltip: A small tooltip will give a hint to the required entry if you point on an input field.
Mandatory entrys are highlighted (red).
The 'Contract' tab contains a summary of your main contract data.

Fields of a ticket

1   Ticket
   Below the text 'Ticket' please type in a short but clear description of the ticket.

2   External ID
   Free edit field for your own purpose

3   Priority

The incident priority of the ticket. See https://ecosphere.censhare.com/en/help-and-customer-service/article/3278198

4   System environment

Please be sure to select either productive or test.

5   Component and version

Please specify the affected component in the free-text field. e.g. Windows censhareClient 2019.1.1

6   Workflow Step

On creation it is automatically set to 'Created'. Precise explanations are given on page 22.

7   Workflow Target

On ticket creation the ticket is always set to *Service Desk*.

The further assignment of the ticket is done by the *Service Desk*.

Attention: In the further processing of the ticket, always assign it to *Service Desk*.

Do not assign it to a specified support member, please.

Only this way ensures the processing of your ticket anyway, e.g. even if a colleague is ill.

ⓘ shows the unavailability of the selected workflow target. The ticket will be continued after the end date.

A 'production critical' ticket only should be assigned to *ServiceDesk* which will be shown by a hint.

8   Field for free text

Here you describe your request/problem as closely as possible. Every entry is displayed with short information about the author in chronological order, newest on top, oldest at the bottom.

If you have to add an entry in an existing ticket, please use the 'New Entry' button above the top entry.
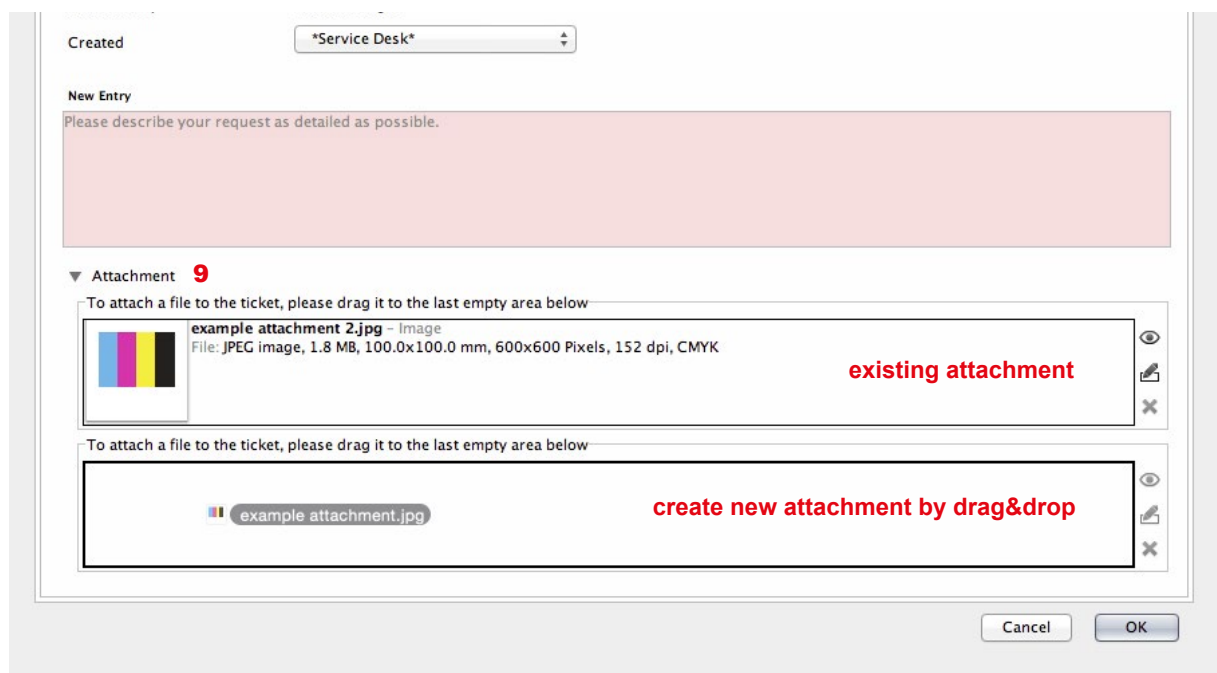
9   Attachments

Already assigned attachments are shown in the ticket provided that the arrow besides 'Attachment' points downwards.

At each attachment you have a 'Quick View', 'Edit Meta Data' and 'Abort Edit' icon rightmost.

Attachments can be added to the ticket directly within the censhareClient (function not available in webClient).
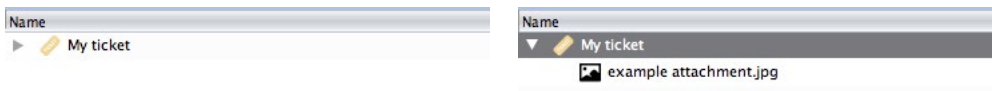
Simply drag your attachments (only one by one) to the last empty area below.

Afterwards a 'Create asset' dialogue pops up to create and assign the new attachment to the ticket.
Usually you can simply ignore the content of the next window 'Create asset',
as vital information is already set automatically.
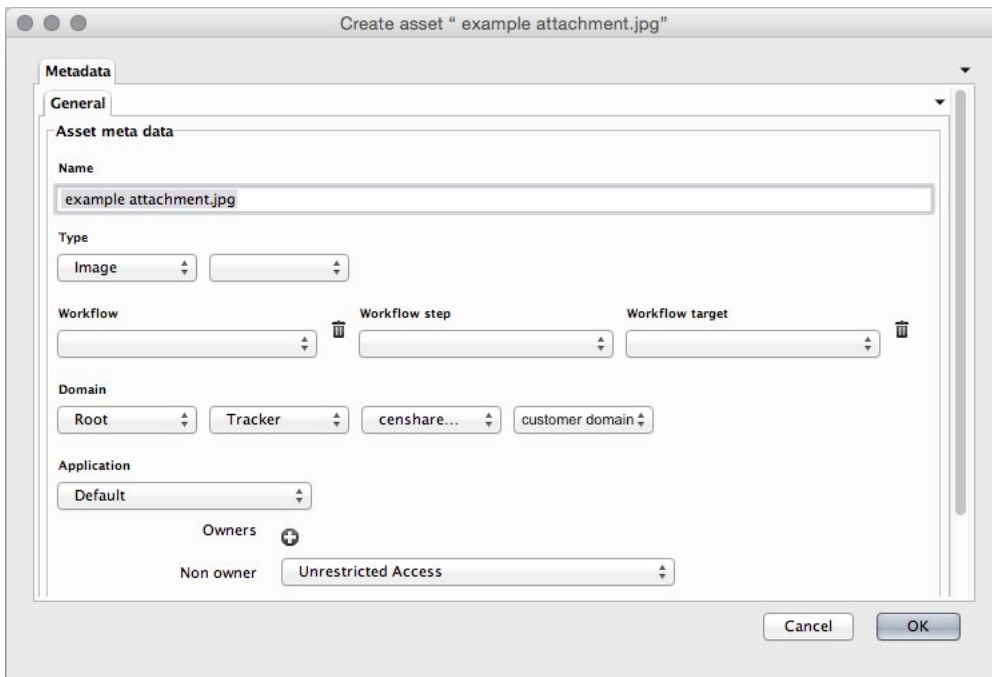
Just click OK and your file is linked to the choosen ticket.

Link to Chapter: <u>Using the 'Workflow-Step' field</u>

Upload a file and link it with the ticket

By drag and drop pull the desired file onto the just created and ready ticket so it is attached.
After creation your ticket can be found using stored searches '_Just created' as described on page 23.
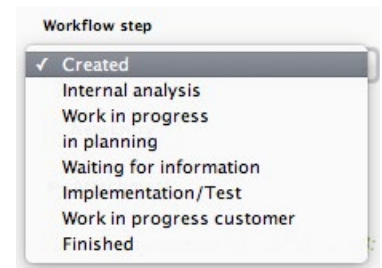
As already described in 'Fields of a ticket', base of page 20, point '9 Attachments', you simply may drag files to the open ticket during the creation process of the ticket.

Using the 'Workflow-Step' field

Currently these steps are available:

Created
The ticket is created and assigned to a target.
By default to *Service Desk*.
Meaning: The ticket is waiting for processing.

Internal analysis
The ticket has been assigned to a censhare specialist to categorize and analyze the content.

Work in progress
The ticket is in progress at a censhare specialist to solve it.

In planning
Tickets without fixed execution date are in queue and handled as soon as possible.
Tickets with a fixed execution date are handled until deadline.
Tasks which are time-phased to the next update / maintenance window in agreement with all involved.

Waiting for information
The ticket has led to a 'Development Ticket' which is in work at our in-house development department.
New informations will be communicated to the customer within his support ticket as soon as available.
Meaning:
The user is waiting for information from the censhare development department.

Implementation/Test
A problem or customizing topic is able to be solved by a fix or a change in the config files. If only the customer or project manager is able to review the correct function, the ticket gets this status.
The ticket shall be assigned to the project manager or customer, because only these are generally able to process the implementation and perform the test.

   Example for Implementation/Test
   - a problem can be solved by a patch within db-schema.xml
   - a new module was installed and the function may only be verified the next day

Work in progress customer
The ticket has been taken by a customer or was assigned to him for further processing.
The censhare specialists are not working any longer on the ticket and are waiting for a customer reply to continue with the work on the ticket.
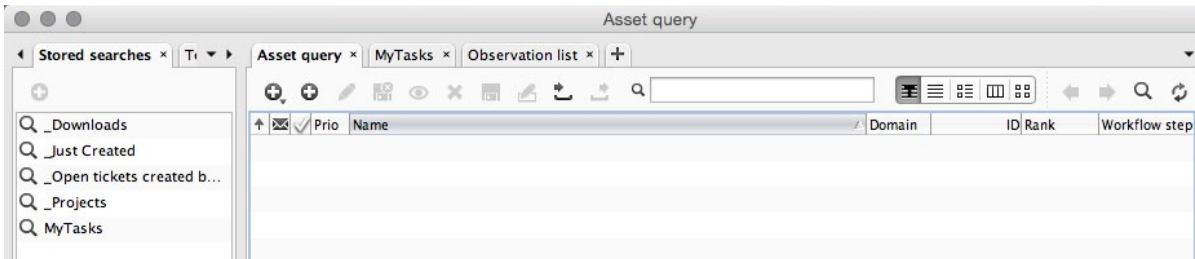
Finished
The problem was solved. The solution was agreed by the customer and censhare. The ticket is closed.

Other info on the system
Tickets only may be suggested for deletion.

Predefined 'Stored searches'

For a fast overview of the tracker-files we recommend you to use predefined 'Stored searches'.

_Downloads   Please find all client and plugin versions here for download
                                  as well as the current tracker-manual with defined Client version.
                                  By right mouse click / Export on the desired asset the download is initialized.
_Just Created   Your recently created tickets
_Open tickets created by me   Your self created tickets which are still open
_Projects: Please open your own customer project here
My Tasks: Please find all user and group assigned assets here

Further censhare internal searches may appear but will show no result to you.

Tickets in progress

Information about email notification on ticket assignment
- In the email text the complete history is displayed
- Email notifications are sent in the following cases to the:
    ticket creator on first version of the ticket, regardless of the workflow-target on save
    workflow-target on a change of the 'Workflow-target' field
    workflow-target on additional ticket entries
    workflow-target on a change of the 'Priority' field
- You cannot reply to this email - answer only by censhare | ecosphere Tracker ticket, please.

Ticket symbols   **Coloured warning triangles reflect the choosen priority of the ticket.**

Ticket   yellow ticket

                                      Red indicates the priority 'critical - critical for production'
Monitoring ticket   green ticket

DEV ticket   blue ticket   Yellow indicates the priority 'high - Workaround possible'

AUTOMATIC TICKET CLOSING
We close tickets automatically, which are not modified within the last 6 months and have not assigned an open development task. Tickets with an assigned development task we usually set to workfow-step 'Waiting for information' and the workflow target to 'zzPendingTask'. This combination is excluded from automatic closing.

If you want to prevent the automatic closing of a ticket, you can do one of the following actions:
    - Set the workflow-status to 'in planning'.
    - Modify the ticket, to get a current modification date ('Modified at').
This will prevent current treatment, but the ticket will be closed after 6 months if it was not modified again.

Notes