OTOBO User Manual

Release 10.0

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Introduction

This manual is intended for use by OTOBO agents. The chapters describe the usage of the OTOBO software as an agent user.

1.1 Login to Agent Interface

The agent interface is available at the following location.

Note: You have to replace `<OTOBO_HOST>` with your domain.

```
https://<OTOBO_HOST>/otobo/index.pl
```

You need an agent account to be able to use OTOBO. If you have no account yet, please contact your administrator.

If you forget your password, click on the Lost your password? link, and follow the instructions there.

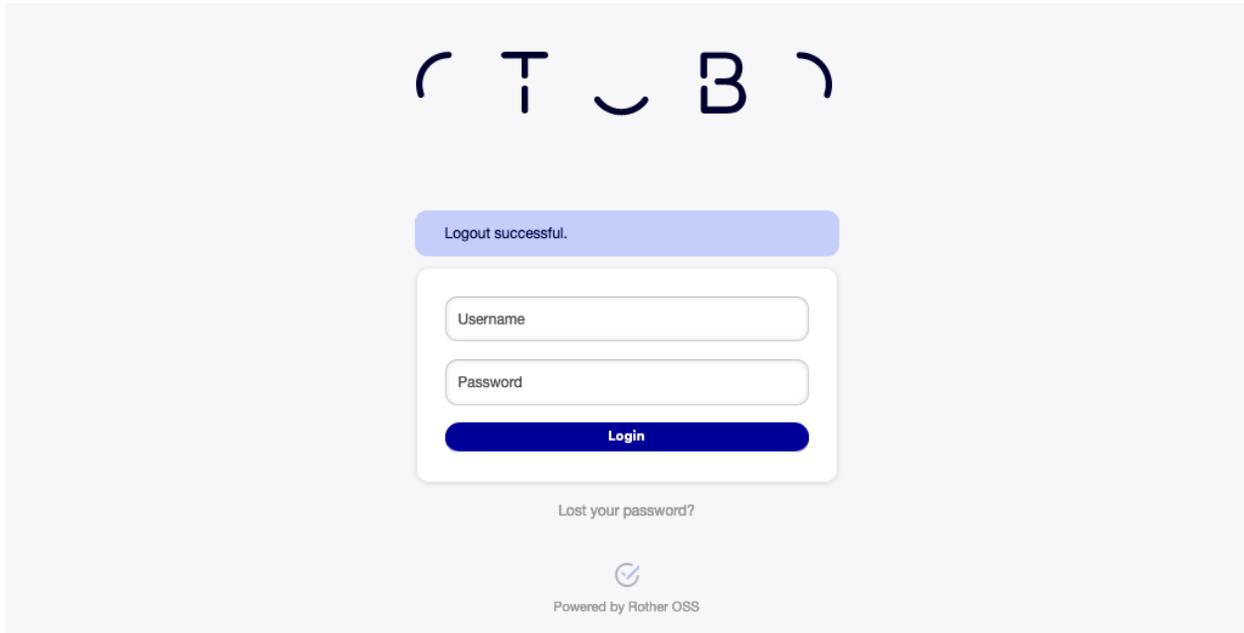After a successful login, the agent dashboard will be displayed.
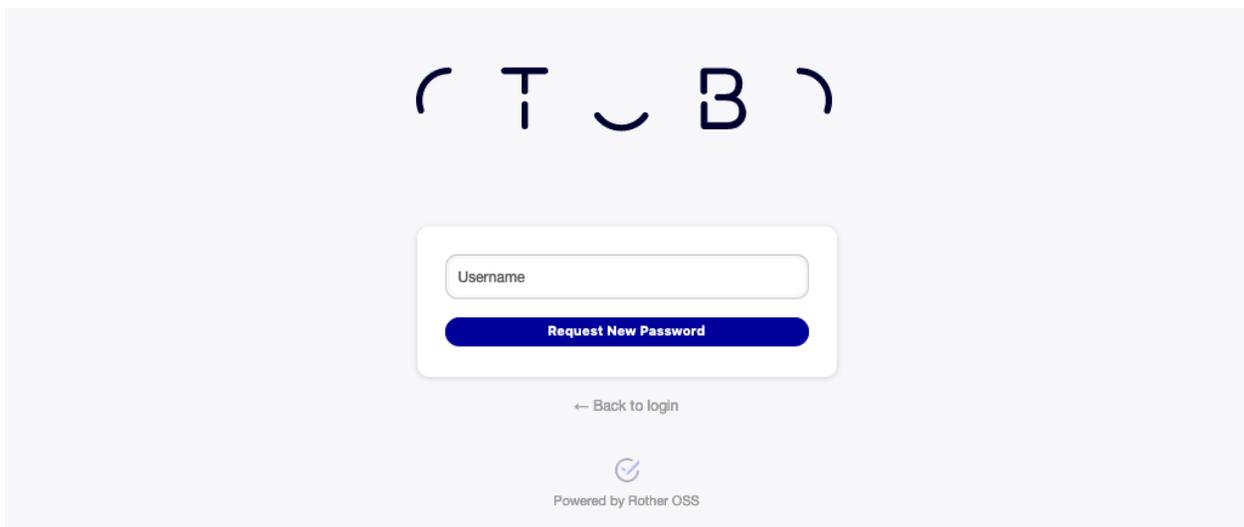
Fig. 1.1: Agent Login Screen

Fig. 1.2: Request New Password Screen

Fig. 1.3: Agent Interface

Dashboard

After login to the agent interface, the agent dashboard will be displayed. This dashboard is a collection of widgets, which display customized important information for each agent.

The dashboard is the main page of the system, where you can get an overview of tickets and other things related to ticket activity. It is designed to be the starting point for an agent's daily work. By default, it provides a quick summary of the tickets that are pending, escalated, new or open, and more information.

One of the most important features about the dashboard is that is completely customizable. That means that you can configure each part as you want, showing or hiding elements. It is even possible to relocate these elements within the same column by clicking on and dragging the header of an element, and dropping them elsewhere. Each element is named widget. The system has some widgets ready to use out of the box, but the modular design of the dashboard screen is prepared to integrate custom widgets easily.

The content of this screen is arranged in two main columns, on the left column you normally can see information about tickets classified by their states like: reminder, escalated, new, and open. On each of these widgets you can filter the results to see all of the tickets that you are allowed to access, tickets you have locked, the ones that are located in agent defined queues, among other filters. There are also other kind of widgets in this column and they are all described below.

2.1 Dashboard

The dashboard is the main overview screen for agents. Use this screen to get full overview about the most important things: ticket lists, appointments, statistics, news.

The header consists of three parts.

Avatar image The Personal Menu and the Logout possibilities.

Toolbar icons Icons with numbers indicating some ticket actions with the number of related tickets. The icons and search boxes are not activated by default.

> **See also:**

Fig. 2.1: Agent Dashboard

Fig. 2.2: Dashboard Header

Icons and search boxes can be activated in settings under Frontend → Agent → Toolbar.

The last icon is the chat availability status.

See also:

System configuration `ChatEngine::Active` needs to be activated to use this feature.

The chat availability status icon is a three-way switch, and can be changed by clicking.

- Empty circle: unavailable for chats.
- Empty circle with tick sign: available for internal (agent to agent) chats.
- Filled circle with tick sign: available for internal (agent to agent) and external (customer to agent, public to agent) chats.

Note: The chat availability status will be changed from external chats to internal chats each time an agent logs in to OTOBO again.

Main menu The main menu of the agent interface.

The dashboard displays so called widgets. A widget is a box, that consists of a header, a filter and a data table. Each widget can be moved with drag and drop, and can have own settings.

Each ticket widget has own filter for displaying:

- My locked tickets: tickets which are locked by the current agent.
- My watched tickets: tickets that the agent has in his/her watched list (requires `Ticket::Watcher` setting to be turned on).
- My responsibilities: tickets that the agent is set as responsible (requires `Ticket::Responsible` setting to be turned on).
- Tickets in My Queues: tickets which are in queues selected in Personal Preferences.
- Tickets in My Services: tickets that are assigned to services selected in Personal Preferences.
- All tickets: all tickets in this kind of widget.

The numbers indicate the number of tickets in each filter term.

To add new widgets:

1. Click on the Settings widget in the right sidebar to expand it.
2. Select the widgets you want to add.
3. Click on the Save settings button.

To remove widgets:

1. Click on the Settings widget in the right sidebar to expand it.
2. Deselect the widgets you want to remove.
3. Click on the Save settings button.

See also:

You can also remove a widget, if you hover the mouse over the widget header and click on the × on the top right corner to close the widget.

To move widgets:

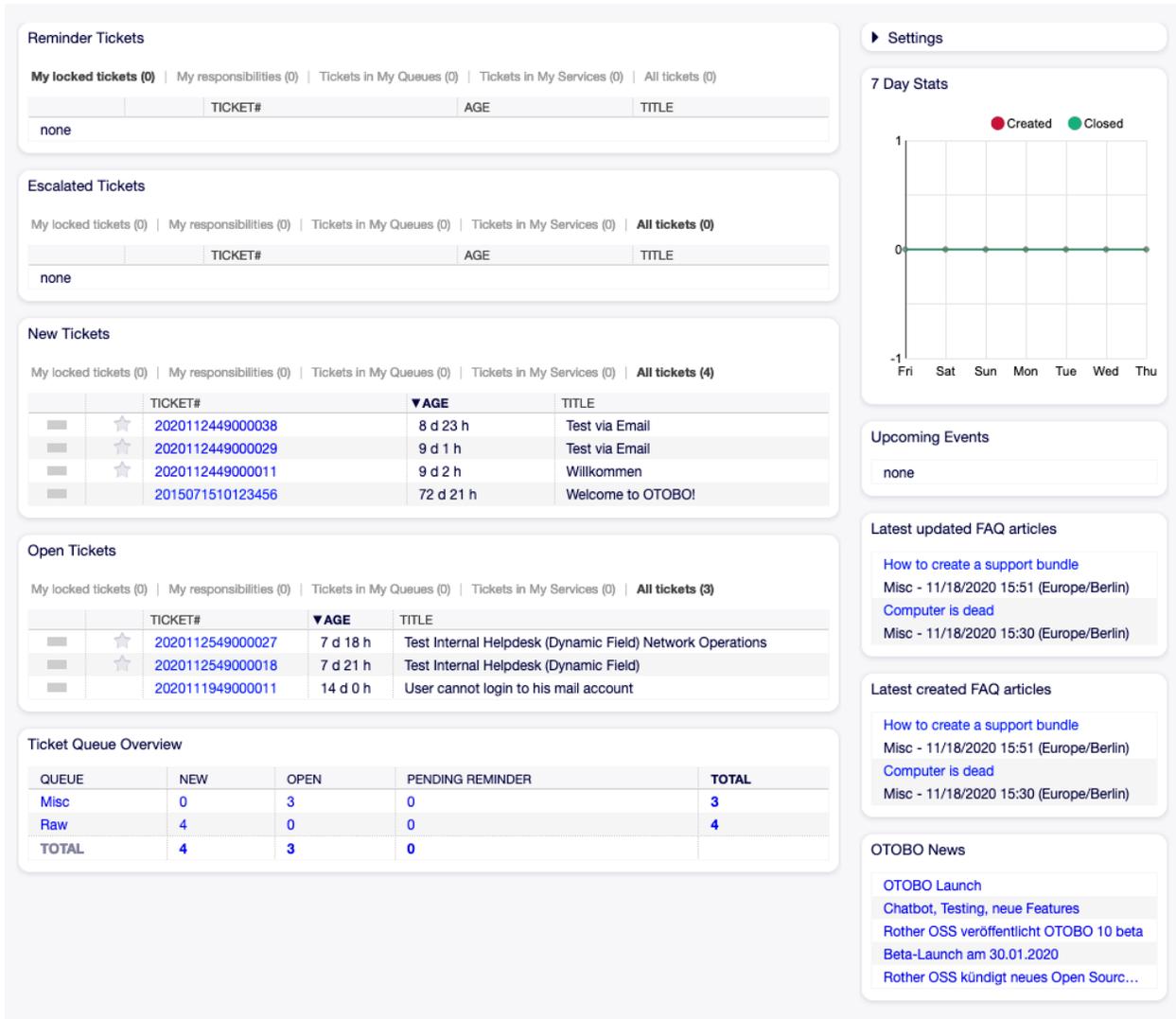1. Click on the widget header and hold down the mouse button.

Fig. 2.3: Dashboard Widgets

2. Drag the widget to the desired position.

3. Drop the widget by releasing the mouse button.

Widgets can have own settings. To configure a widget:

1. Hover the mouse over the widget header.

2. Click on the gear icon in the top right corner.

3. Change the number and set the visible columns by drag and drop.

4. Click on the Save Changes button.

Fig. 2.4: Widget Settings

Note: The order of visible columns can be set by rearrange the columns in the Visible columns field.

2.1.1 Dashboard Content Widgets

Note: The widgets can be different depending on the installed packages and system configuration settings.

The Reminder Tickets widget lists the pending tickets. Pending tickets are set for later work by the agent, and the reminder time is going to expire soon.

The Escalated Tickets widget lists the escalated tickets. Escalated tickets are after the time set in service level agreement, and therefore needs to be worked on them immediately.

The New Tickets widget lists the recently created tickets. New tickets are not handled by an agent yet.

The Open Tickets widget lists the open tickets. Open tickets represent the current work done by the agent.

Fig. 2.5: Reminder Tickets Widget

Fig. 2.6: Escalated Tickets Widget

Fig. 2.7: New Tickets Widget

Fig. 2.8: Open Tickets Widget

The Running Process Tickets widget lists the process tickets, that are started, but not finished yet.
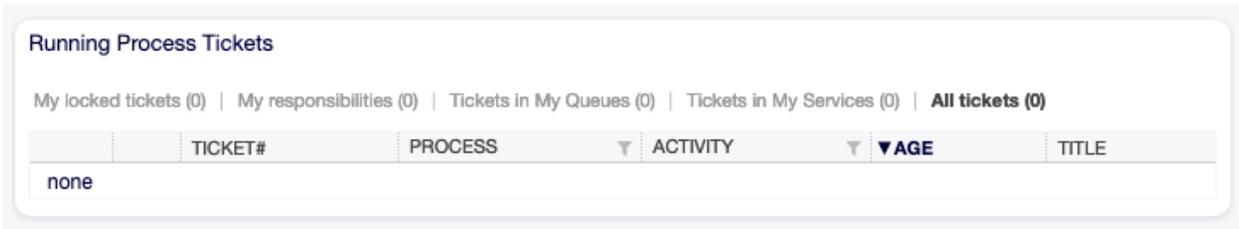

Fig. 2.9: Running Process Tickets Widget

The Ticket Queue Overview widget gives an overview as a ticket count matrix, where the rows represent queues and the columns represent the ticket states. Each cell displays the number of tickets in a defined state that belongs to a particular queue.

Fig. 2.10: Ticket Queue Overview Widget

The Events Ticket Calendar widget displays tickets in a calendar, but this widget does not work out-of-the-box.

To display the tickets in this calendar, the following settings need to be set by an **admin user**:

1. Create the following dynamic fields:

Object	Type	Name	Label
Ticket	Date / Time	`TicketCalendarStartTime`	Calendar Start Time
Ticket	Date / Time	`TicketCalendarEndTime`	Calendar End Time

2. Navigate to Frontend → Agent → View and select a view to add the dynamic field to.

   For example add these dynamic fields to New Phone Ticket screen and New Email Ticket screen to set the dates at ticket creation time, or to Ticket Free Fields screen to set the dates for existing ticket in the Miscellaneous → Free Fields menu item of the Ticket Zoom screen.

   - `Ticket::Frontend::AgentTicketPhone###DynamicField`

     - `TicketCreateStartTime` → 1 – Enabled

     - `TicketCreateEndTime` → 1 – Enabled

   - `Ticket::Frontend::AgentTicketEmail###DynamicField`

     - `TicketCreateStartTime` → 1 – Enabled

     - `TicketCreateEndTime` → 1 – Enabled

   - `Ticket::Frontend::AgentTicketFreeText###DynamicField`

     - `TicketCreateStartTime` → 1 – Enabled

- `TicketCreateEndTime` → 1 – Enabled

3. Add more queues to `DashboardEventsTicketCalendar###Queues` setting (default is Raw queue only).

If the dynamic fields contain values for the tickets, the tickets are displayed in the widget.

Hover the mouse over an entry to see the details of the ticket, or click on it to open the ticket in the Ticket Zoom screen.
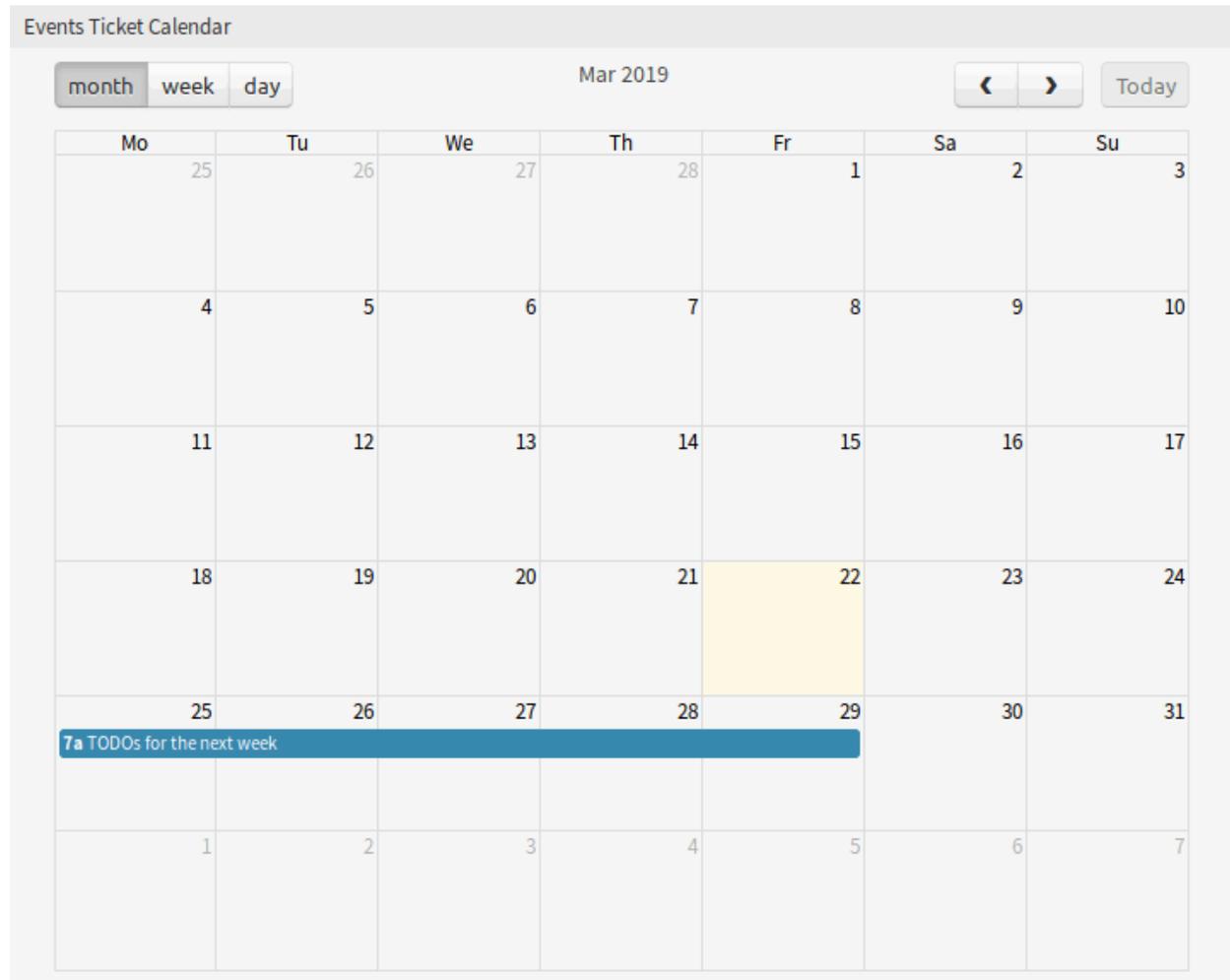

Fig. 2.11: Events Ticket Calendar Widget

2.1.2 Dashboard Sidebar Widgets

The following widgets are located on the right sidebar. There is a Settings widget to turn other widgets on or off, and some information widgets also displayed here.

The Settings widget lists all available widgets on the screen.

To turn on or off a widget:

1. Expand the Settings widget in the right sidebar by clicking on its header bar.

2. Modify the checked state of a checkbox.
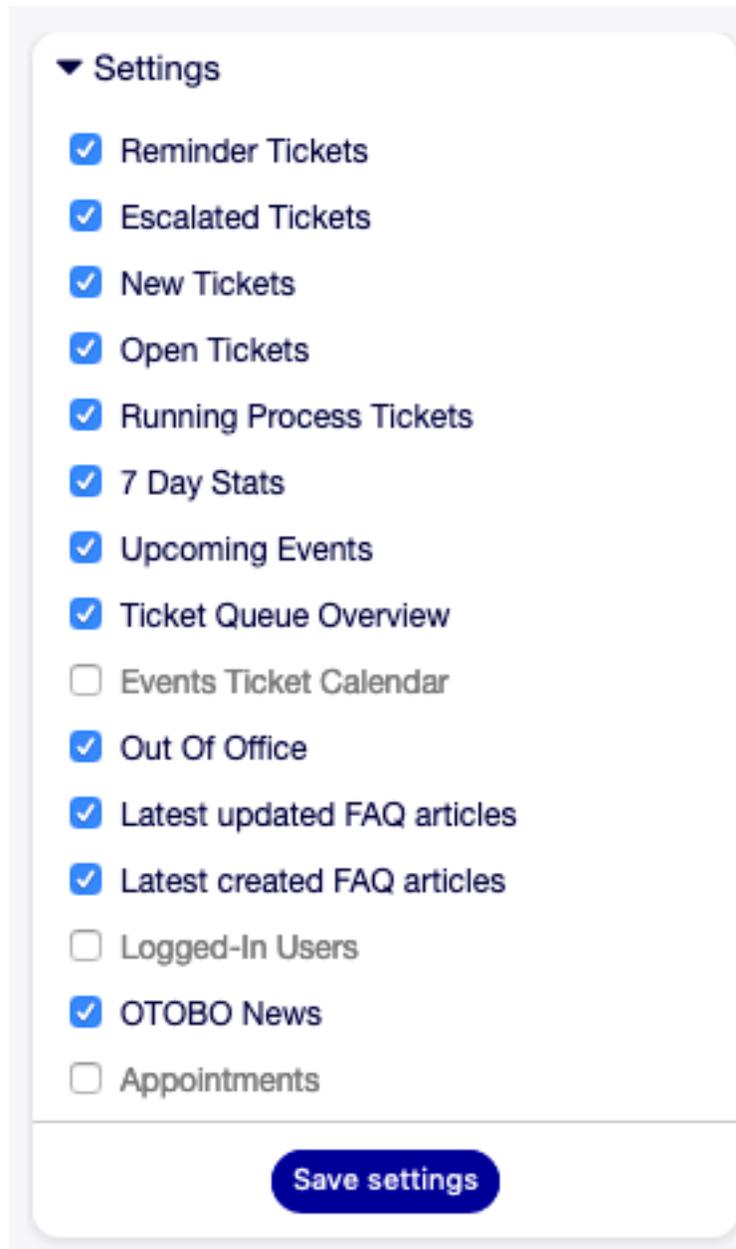
Fig. 2.12: Settings Widget

3. Click on the Save settings button.

The 7 Day Stats widget displays the number of created and closed tickets in the last seven days.
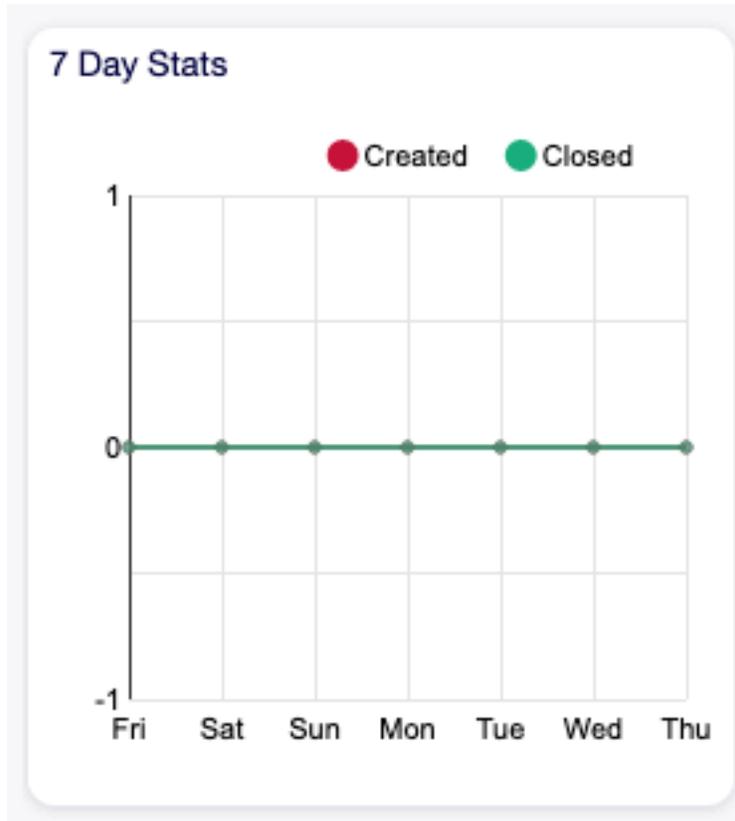

Fig. 2.13: 7 Day Stats Widget

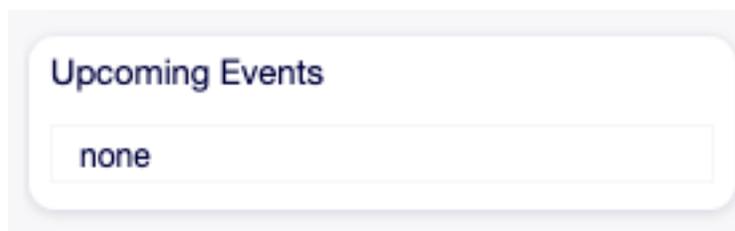The Upcoming Events widget displays entries from the Calendar.

Fig. 2.14: Upcoming Events Widget

The Out Of Office widget displays the agents, who are currently out of office. This information can be set in the User Profile module of the Personal Preferences.

Note: If currently no agents are out of office, this widget is not displayed.

The Latest updated FAQ articles widget displays the FAQ articles, that are updated recently.

The Latest created FAQ articles widget displays the FAQ articles, that are created recently.

The Logged-In Users widget displays the currently online agents and customer users.

Fig. 2.15: Out Of Office Widget

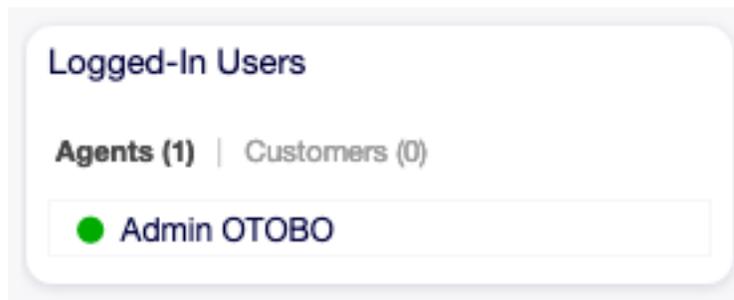Fig. 2.16: Latest Updated FAQ Articles Widget

Fig. 2.17: Latest Created FAQ Articles Widget

Fig. 2.18: Logged-In Users Widget