



# OTOB User Manual

11.0

Rother OSS GmbH

2024 09 20



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OTRS AG (<https://otrs.com>) Zimmersmühlenweg 1161440

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---

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

## 1.1



---

: 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.





## 1.2 Login to Customer Interface

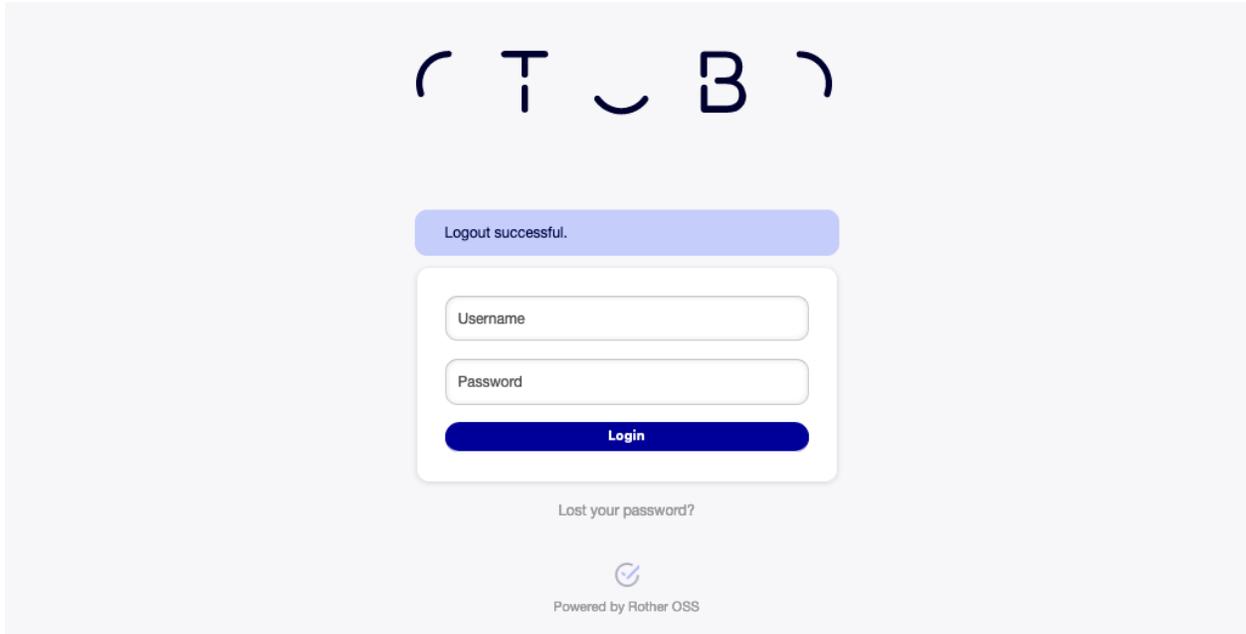
The customer interface is available at the following location.

---

: You have to replace <OTOBO\_HOST> with your domain.

---

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



1.1: 00000000



1.2: 000000

T
B
F

Otobo Helpdesk

Dashboard
Customers
Calendar
Tickets
FAQ
Reports
Admin
🔍

**Reminder Tickets**

My locked tickets (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

**Escalated Tickets**

My locked tickets (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

**New Tickets**

My locked tickets (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (1)

| TICKET#          | AGE       | TITLE             |
|------------------|-----------|-------------------|
| 2015071510123456 | 57 d 22 h | Welcome to OTOBO! |

**Open Tickets**

My locked tickets (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

**Ticket Queue Overview**

| QUEUE        | NEW      | OPEN     | PENDING REMINDER | TOTAL |
|--------------|----------|----------|------------------|-------|
| Raw          | 1        | 0        | 0                | 1     |
| <b>TOTAL</b> | <b>1</b> | <b>0</b> | <b>0</b>         |       |

Settings

**7 Day Stats**

Upcoming Events

none

Latest updated FAQ articles

Latest created FAQ articles

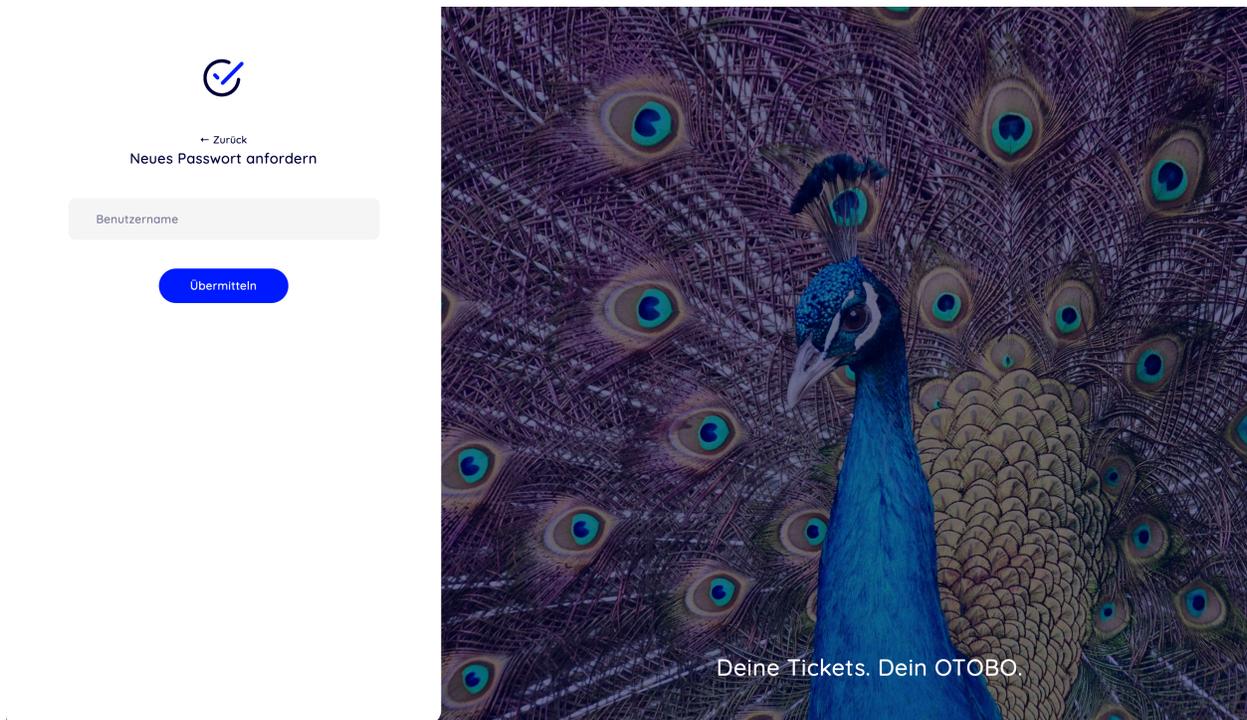
**OTOBO News**

- OTOBO Launch
- Chatbot, Testing, neue Features
- Rother OSS veröffentlicht OTOBO 10 beta Beta-Launch am 30.01.2020
- Rother OSS kündigt neues Open Sourc...

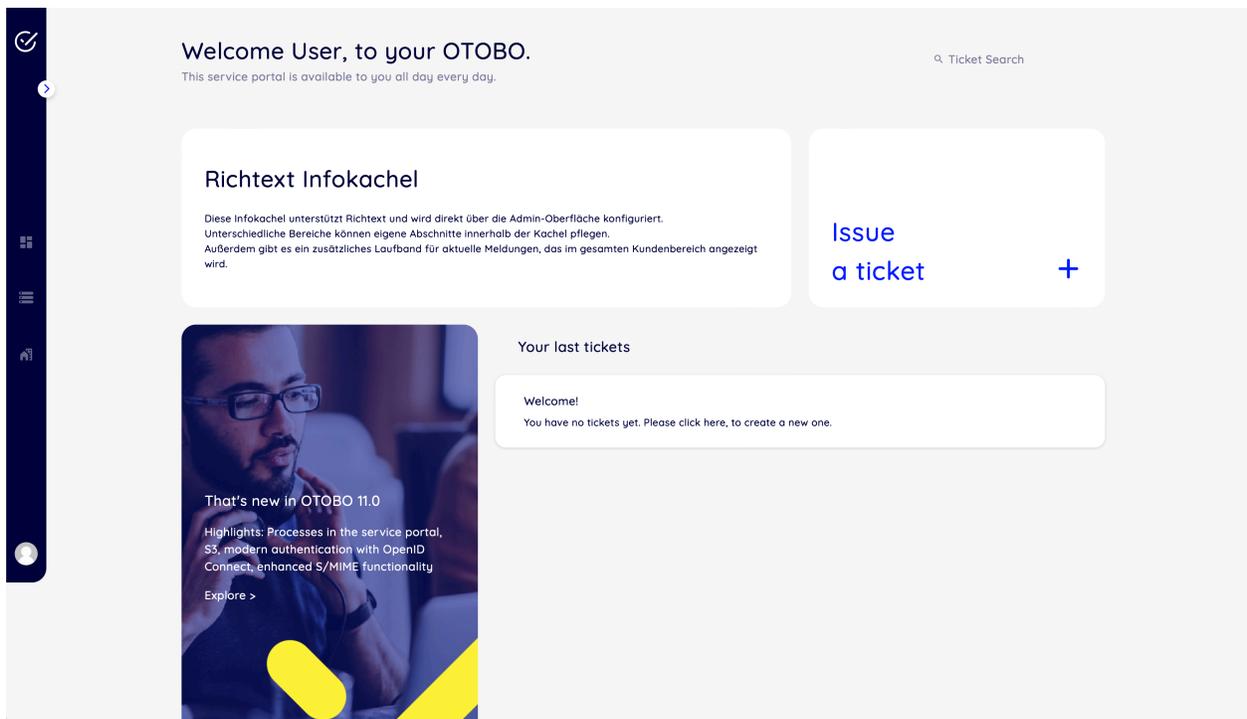
Powered by Rother OSS

1.3: [redacted]





1.5: [Icon] [Icon] [Icon] [Icon] [Icon]



1.6: Customer Interface



In this section you can find information if you are working as an agent in OTOBO.

### 2.1


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.

#### 2.1.1


 The  and the  possibilities.

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

:

The screenshot displays the OTOBO dashboard with a dark blue header containing navigation links: Dashboard, Customers, Calendar, Tickets, FAQ, Reports, Admin, and a search icon. The main content area is divided into several sections:

- Reminder Tickets:** Shows 'My locked tickets (0)' and a table with columns TICKET#, AGE, and TITLE. The table is currently empty.
- Escalated Tickets:** Shows 'My locked tickets (0)' and a table with columns TICKET#, AGE, and TITLE. The table is currently empty.
- New Tickets:** Shows 'My locked tickets (0)' and 'All tickets (1)'. The table has columns TICKET#, AGE, and TITLE. One ticket is listed:
 

| TICKET#          | AGE       | TITLE             |
|------------------|-----------|-------------------|
| 2015071510123456 | 57 d 22 h | Welcome to OTOBO! |
- Open Tickets:** Shows 'My locked tickets (0)' and 'All tickets (0)'. The table has columns TICKET#, AGE, and TITLE. The table is currently empty.
- Ticket Queue Overview:** A summary table:
 

| QUEUE        | NEW      | OPEN     | PENDING REMINDER | TOTAL |
|--------------|----------|----------|------------------|-------|
| Raw          | 1        | 0        | 0                | 1     |
| <b>TOTAL</b> | <b>1</b> | <b>0</b> | <b>0</b>         |       |

The right sidebar contains:

- Settings:** A link to the settings page.
- 7 Day Stats:** A line chart showing 'Created' (red) and 'Closed' (green) tickets over a 7-day period. The y-axis ranges from 0 to 1. A green area under the line shows 1 closed ticket on Thursday.
- Upcoming Events:** A section currently showing 'none'.
- Latest updated FAQ articles:** A section currently showing 'none'.
- Latest created FAQ articles:** A section currently showing 'none'.
- OTOBO News:** A list of news items:
  - OTOBO Launch
  - Chatbot, Testing, neue Features
  - Rother OSS veröffentlicht OTOBO 10 beta
  - Beta-Launch am 30.01.2020
  - Rother OSS kündigt neues Open Sourc...

At the bottom of the dashboard, there is a logo for Rother OSS and the text 'Powered by Rother OSS'.

2.1: Dashboard

This block shows the top portion of the OTOBO dashboard, including the dark blue header with navigation links: Dashboard, Customers, Calendar, Tickets, FAQ, Reports, Admin, and a search icon. The OTOBO logo is visible on the right side of the header.

2.2: Navigation

Step 1 → Step 2 → Step 3

Step 4

Note:

ChatEngine::Active

Configuration

- Configuration
- Configuration
- Configuration (Configuration)

---

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

---

Step 1

Configuration

Configuration

- Configuration
- Configuration Ticket::Watcher
- Configuration Ticket::Responsible
- Configuration
- Configuration
- Configuration

Configuration

Configuration

1. Configuration
2. Configuration
3. Configuration

Configuration

1. Configuration
2. Configuration
3. Configuration

Note:

Configuration × Configuration

Configuration

1. Configuration
2. Configuration
3. Configuration

Configuration

**Reminder Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

|  | TICKET# | AGE | TITLE |
|--|---------|-----|-------|
|  | none    |     |       |

**Escalated Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

|  | TICKET# | AGE | TITLE |
|--|---------|-----|-------|
|  | none    |     |       |

**New Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (4)

|     | TICKET#                          | ▼AGE      | TITLE             |
|-----|----------------------------------|-----------|-------------------|
| ■ ☆ | <a href="#">2020112449000038</a> | 8 d 23 h  | Test via Email    |
| ■ ☆ | <a href="#">2020112449000029</a> | 9 d 1 h   | Test via Email    |
| ■ ☆ | <a href="#">2020112449000011</a> | 9 d 2 h   | Willkommen        |
| ■   | <a href="#">2015071510123456</a> | 72 d 21 h | Welcome to OTOBO! |

**Open Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (3)

|     | TICKET#                          | ▼AGE     | TITLE   |
|-----|----------------------------------|----------|---|
| ■ ☆ | <a href="#">2020112549000027</a> | 7 d 18 h | Test Internal Helpdesk (Dynamic Field) Network Operations |
| ■ ☆ | <a href="#">2020112549000018</a> | 7 d 21 h | Test Internal Helpdesk (Dynamic Field)                    |
| ■   | <a href="#">2020111949000011</a> | 14 d 0 h | User cannot login to his mail account                     |

**Ticket Queue Overview**

| QUEUE        | NEW      | OPEN     | PENDING REMINDER | TOTAL |
|--------------|----------|----------|------------------|-------|
| Misc         | 0        | 3        | 0                | 3     |
| Raw          | 4        | 0        | 0                | 4     |
| <b>TOTAL</b> | <b>4</b> | <b>3</b> | <b>0</b>         |       |

Settings

**7 Day Stats**

**Upcoming Events**

none

**Latest updated FAQ articles**

- [How to create a support bundle](#)
- Misc - 11/18/2020 15:51 (Europe/Berlin)
- [Computer is dead](#)
- Misc - 11/18/2020 15:30 (Europe/Berlin)

**Latest created FAQ articles**

- [How to create a support bundle](#)
- Misc - 11/18/2020 15:51 (Europe/Berlin)
- [Computer is dead](#)
- Misc - 11/18/2020 15:30 (Europe/Berlin)

**OTOBO News**

- [OTOBO Launch](#)
- [Chatbot, Testing, neue Features](#)
- [Rother OSS veröffentlicht OTOBO 10 beta](#)
- [Beta-Launch am 30.01.2020](#)
- [Rother OSS kündigt neues Open Sourc...](#)

2.3: 11.0 11.0

- 1. [Placeholder]
- 2. [Placeholder]
- 3. [Placeholder]
- 4. [Placeholder]

**New Tickets**

Shown Tickets:

Shown Columns:

| AVAILABLE COLUMNS                                       | VISIBLE COLUMNS (ORDER BY DRAG & DROP) |
|---|--|
| <input type="text" value="Filter available fields..."/> |  |
| Changed   | 1. TicketNumber                        |
| Created   | 2. Age                                 |
| Customer Name   | 3. Title                               |
| Customer ID   |  |
| Customer User Name                                      |  |
| Customer User ID  |  |
| First Response Time                                     |  |

or

Figure 2.4: [Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

**Reminder Tickets**

My locked tickets (0)   Tickets in My Queues (0)   **All tickets (0)**

|      | TICKET# | AGE | TITLE |
|------|---------|-----|-------|
| none |         |     |       |

Figure 2.5: [Placeholder]

[Placeholder]

[Placeholder]

**Escalated Tickets**

My locked tickets (0) Tickets in My Queues (0) **All tickets (0)**

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

2.6: Escalated Tickets

**New Tickets**

My locked tickets (1) Tickets in My Queues (0) **All tickets (1)**

| TICKET#          | AGE        | TITLE            |
|------------------|------------|------------------|
| 2015071510123456 | 122 d 22 h | Welcome to OTRS! |

2.7: New Tickets

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.

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.

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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.

1. Ticket Queue Overview

| Queue   | State | Count | Start/End Time          |
|---------|-------|-------|-------------------------|
| Queue 1 | Open  | 5     | TicketCalendarStartTime |
| Queue 1 | Open  | 5     | TicketCalendarEndTime   |

2. Ticket Queue Overview → Ticket Queue Overview → Ticket Queue Overview

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.

- Ticket::Frontend::AgentTicketPhone###DynamicField
  - TicketCreateStartTime → 1 - [ ]
  - TicketCreateEndTime → 1 - [ ]

**Open Tickets**

My locked tickets (0) Tickets in My Queues (0) **All tickets (0)**

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

2.8: Open Tickets



Events Ticket Calendar

month week day Mar 2019 < > Today

| Mo                         | Tu | We | Th | Fr | Sa | Su |
|----------------------------|----|----|----|----|----|----|
| 25                         | 26 | 27 | 28 | 1  | 2  | 3  |
| 4                          | 5  | 6  | 7  | 8  | 9  | 10 |
| 11                         | 12 | 13 | 14 | 15 | 16 | 17 |
| 18                         | 19 | 20 | 21 | 22 | 23 | 24 |
| 25                         | 26 | 27 | 28 | 29 | 30 | 31 |
| 7a TODOs for the next week |    |    |    |    |    |    |
| 1                          | 2  | 3  | 4  | 5  | 6  | 7  |

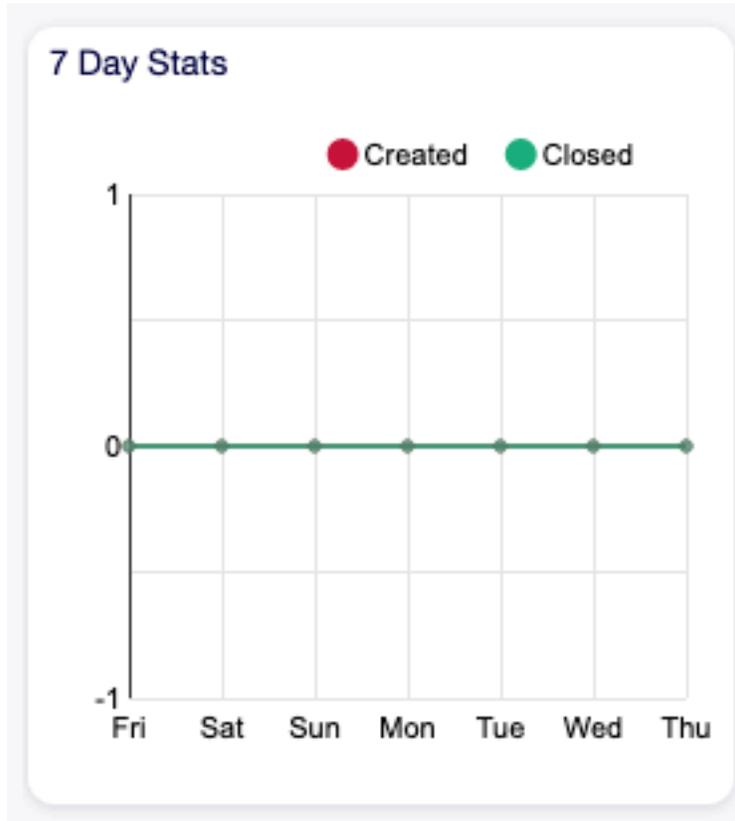
Figure 2.11: Events Ticket Calendar

▼ Settings

- Reminder Tickets
- Escalated Tickets
- New Tickets
- Open Tickets
- Running Process Tickets
- 7 Day Stats
- Upcoming Events
- Ticket Queue Overview
- Events Ticket Calendar
- Out Of Office
- Latest updated FAQ articles
- Latest created FAQ articles
- Logged-In Users
- OTOBO News
- Appointments

**Save settings**

2.12: Settings



2.13: 7 Day Stats

### Upcoming Events

none

2.14: Upcoming Events

Figure 2.15: Out of Office widget



Figure 2.15: Out of Office widget

Figure 2.16: Latest updated FAQ articles widget



Figure 2.16: Latest updated FAQ articles widget

Figure 2.17: Latest created FAQ articles widget



Figure 2.17: Latest created FAQ articles widget

Figure 2.18: OTOBO News widget

The OTOBO News widget displays news from an RSS feed.

Figure 2.18: OTOBO News widget

Example RSS feed: DashboardBackend###0410-RSS

Figure 2.18: OTOBO News widget

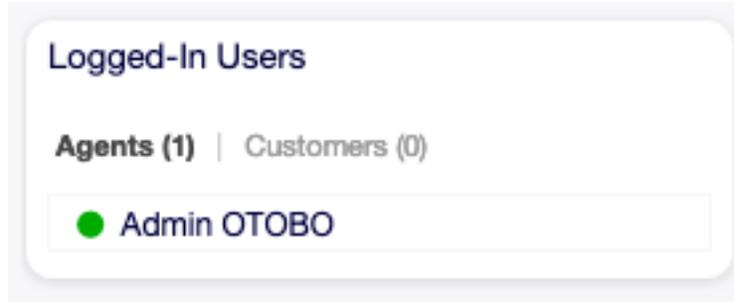


Figure 2.18: Logged-In Users

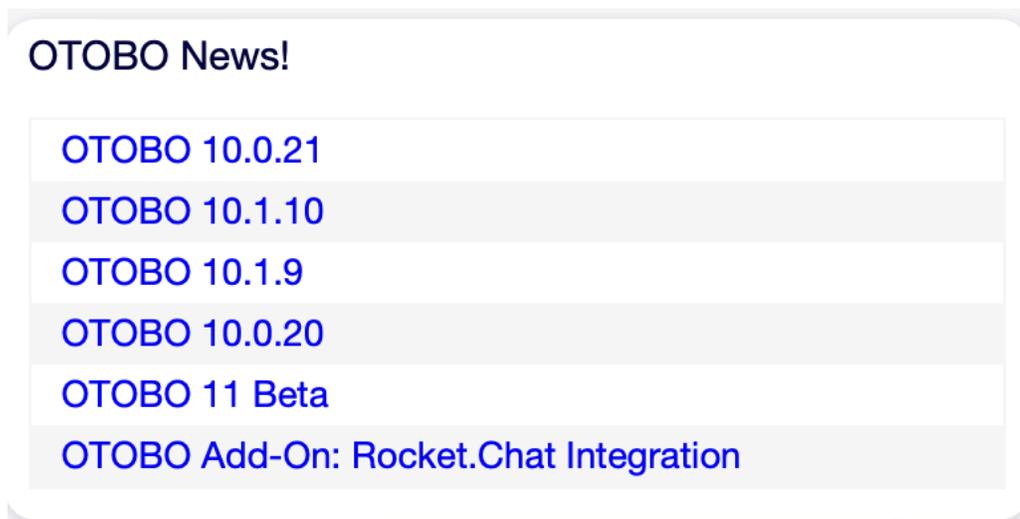


Figure 2.19: OTOBO News Widget

Figure 2.20: Appointments widget

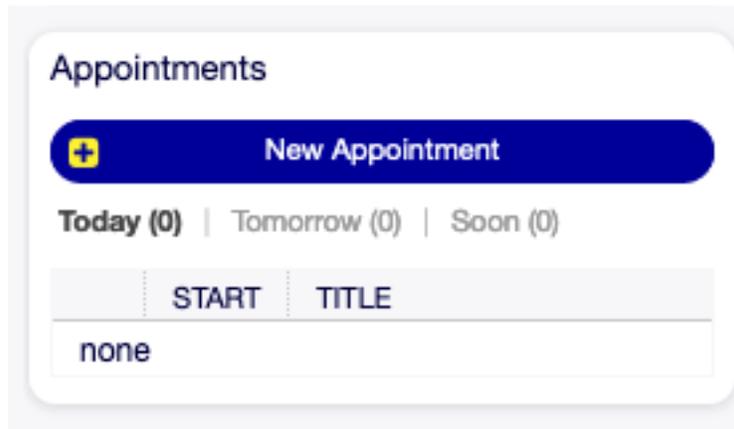


Figure 2.20: Appointments widget

## 2.2 Profile

Use this menu to customize your profile in OTOBO. The personal menu is available via your avatar in the top left corner.

All settings changed in this menu affect only your profile, and does not affect the behavior of OTOBO for other agents.

### 2.2.1 Profile

Figure 2.21: Profile Web View

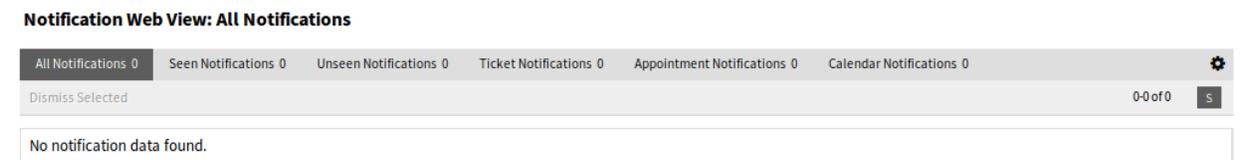


Figure 2.21: Profile Web View

Notifications can be filtered by clicking on a state name in the header of the overview widget. There is an option All Notifications to see all notifications. The numbers after the state names indicate how many notifications are in each state.

Figure 2.22: Profile Web View

1. Profile Web View
2. Profile Web View
3. Profile Web View

Figure 2.22: Personal Preferences Overview Screen

---

### 2.2.2 Personal Preferences

Use this screen to set personal preferences in OTOBO. The personal preferences screen is available in the Personal Preferences menu item of the Avatar menu.

This overview screen consists of three modules.

- User Profile
- Notification Settings
- Miscellaneous

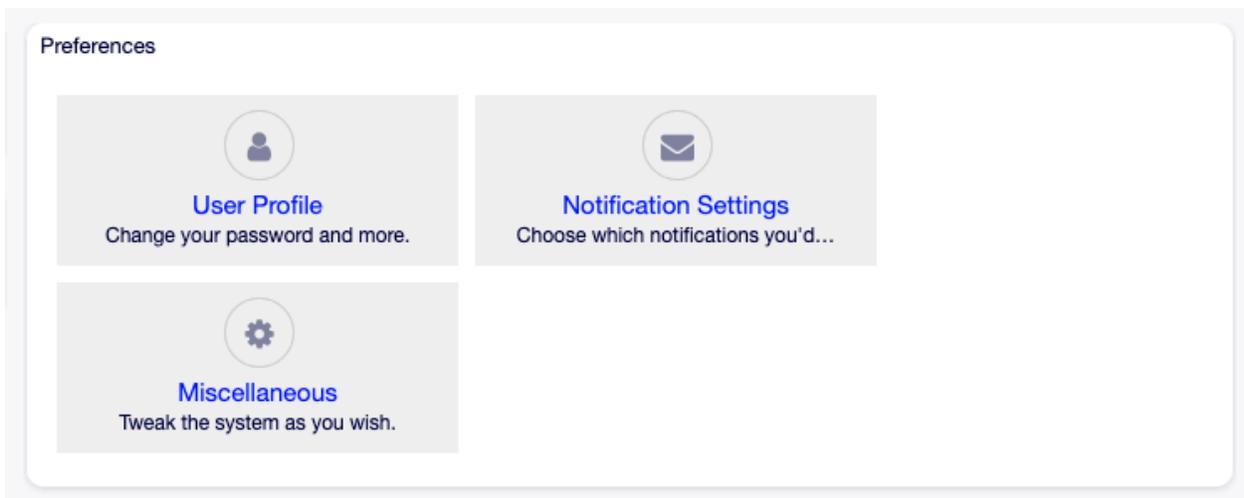


Figure 2.22: Personal Preferences Overview Screen

Figure 2.23: User Profile Settings Screen

---

Figure 2.24: Notification Settings Screen

---

Figure 2.25: Miscellaneous Settings Screen

Figure 2.26: Password Change Screen

Figure 2.27: Account Deletion Screen

Figure 2.28: Account Deletion Confirmation Screen

Figure 2.29: Account Deletion Confirmation Confirmation Screen

Figure 2.30: Account Deletion Confirmation Confirmation Confirmation Screen

Figure 2.31: Account Deletion Confirmation Confirmation Confirmation Confirmation Screen

**Change password**

|   |   |                                     |
|---|---|-------------------------------------|
| Current password: <input style="width: 90%;" type="password"/><br>New password: <input style="width: 90%;" type="password"/><br>Verify password: <input style="width: 90%;" type="password"/> | Set a new password by filling in your current password and a new one. | <input checked="" type="checkbox"/> |
|---|---|-------------------------------------|

2.23: Change password

2.23: Change password

2.23: Change password

PreferencesGroups###GoogleAuthenticatorSecretKey

RFC6238 Google

**Google Authenticator**

|   |   |                                     |
|---|---|-------------------------------------|
| Shared Secret: <input style="width: 80%;" type="text"/> <input type="button" value="Generate"/> | Enter your shared secret to enable two factor authentication. | <input checked="" type="checkbox"/> |
|---|---|-------------------------------------|

2.24: Google Authenticator

A-Z0-92-7

2.24: Google Authenticator

2.24: Google Authenticator

2.24: Google Authenticator

**Avatar**

|   |                           |                                     |
|---|---------------------------|-------------------------------------|
| <div style="display: flex; align-items: center;">                  You can change your avatar image by registering with your email address <a href="mailto:jado@trash-mail.net">jado@trash-mail.net</a> at <a href="https://gravatar.com">gravatar.com</a>. Please note that it can take some time until your new avatar becomes available because of caching.             </div> | Change your avatar image. | <input checked="" type="checkbox"/> |
|---|---------------------------|-------------------------------------|

2.25: Avatar

It is not possible to upload an avatar image directly in OTOBO. You have to register your email address on Gravatar to use this feature. Otherwise the first letters of first name and last name will be displayed.

2.25: Avatar

Use this widget to set the language for the OTOBO user interface.





### Ticket notifications

| NOTIFICATION                             | ✉                                   |
|--|-------------------------------------|
| Ticket create notification               | <input checked="" type="checkbox"/> |
| Ticket follow-up notification (locked)   | <input checked="" type="checkbox"/> |
| Ticket follow-up notification (unlocked) | <input checked="" type="checkbox"/> |
| Ticket lock timeout notification         | <input checked="" type="checkbox"/> |
| Ticket queue update notification         | <input checked="" type="checkbox"/> |
| Ticket service update notification       | <input checked="" type="checkbox"/> |

Choose for which kind of ticket changes you want to receive notifications. Please note that you can't completely disable notifications marked as mandatory.

2.31: Ticket notifications

Figure 2.31

Figure 2.31: Ticket notifications

### Appointment notifications

| NOTIFICATION                      | ✉                                   |
|-----------------------------------|-------------------------------------|
| Appointment reminder notification | <input checked="" type="checkbox"/> |

Choose for which kind of appointment changes you want to receive notifications.

2.32: Appointment notifications

Figure 2.32: Appointment notifications

Figure 2.32

Figure 2.32:

Figure 2.32: ChatEngine::Active

Figure 2.32: ChatEngine::Active

Figure 2.32: ChatEngine::Active

### My Chat Channels

Your selection of your preferred external chat channels. You will be notified about external chat requests in these chat channels.

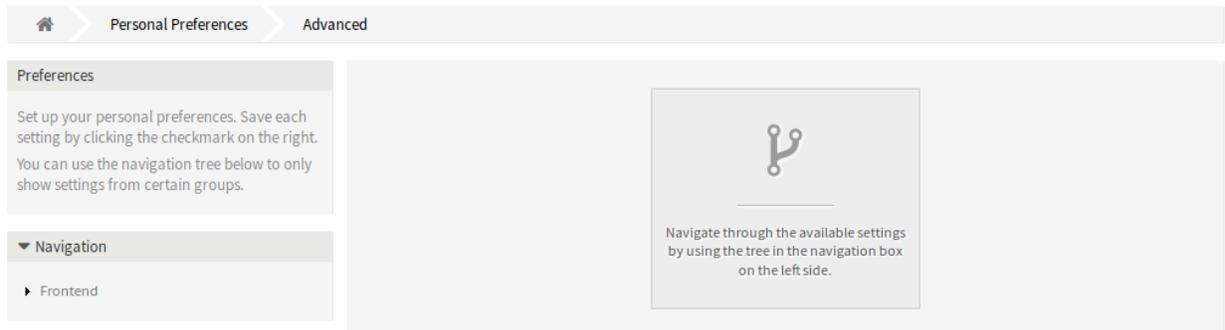
✓

2.33: My Chat Channels

Figure 2.33: My Chat Channels

Figure 2.33

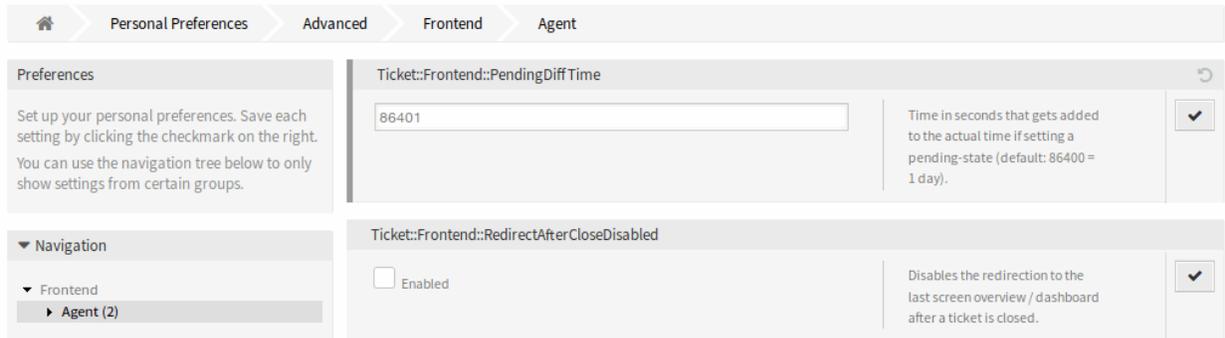




2.37: Navigation



1. Navigation
2. Frontend
3. Agent



2.38: Agent - Settings



1. Agent

### 2.2.3 Logout

Use this menu item to leave OTOBO and go to the login screen.



## 2.3

Customer Information Center

### 2.3.1

Customer information center is a dashboard, which displays all relevant tickets and customer users of a customer. This dashboard has the same purpose as the agent dashboard: to see all relevant information at a glance.

Customer information center is used to search for a customer or a customer user.

Search dialog

Clicking on the Customer Information Center menu item will open a search dialog to search for a customer or a customer user. At least two characters need to be entered here.



Figure 2.39: Search dialog

Customer: [input field]

Customer User: [input field]

[input field]

Customer:

[input field]

Customer Users

The Customer Users widget is used to list all customer users belong to the customer. It is possible to add or edit customer users, see the details and create tickets directly from the widget.

Customer Users widget

1. Customer Users widget
2. Add Customer User
3. Edit Customer User

Customer Users

**Customer Information Center – Acme Inc. (acme.co)**

**Customer Users**

[+ Add Customer User](#)

| CUSTOMER USER ID | CUSTOMER USER INFORMATION              | OPEN | CLOSED | PHONE TICKET | EMAIL TICKET | EDIT |
|------------------|--|------|--------|--------------|--------------|------|
| we               | "Wyle Coyote"<br><we@acme.example.com> | 3    | 1      | Create       | Create       |      |

**Reminder Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

**Escalated Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

**New Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

**Open Tickets**

My locked tickets (2) | My responsibilities (3) | Tickets in My Queues (3) | Tickets in My Services (0) | All tickets (3)

| TICKET#          | AGE      | TITLE   |
|------------------|----------|---|
| 2020112549000027 | 7 d 20 h | Test Internal Helpdesk (Dynamic Field) Network Operations |
| 2020112549000018 | 7 d 22 h | Test Internal Helpdesk (Dynamic Field)                    |
| 2020111949000011 | 14 d 1 h | User cannot login to his mail account                     |

**Settings**

**Company Status**

Escalated tickets: 0

Open tickets: 3

Closed tickets: 1

All tickets: 4

**Customer Information**

Customer: Acme Inc.

Comment: A great company

2.40: Customer Information Center

**Customer Users**

[+ Add Customer User](#)

| CUSTOMER USER ID | CUSTOMER USER INFORMATION              | OPEN | CLOSED | PHONE TICKET | EMAIL TICKET | EDIT |
|------------------|--|------|--------|--------------|--------------|------|
| we               | "Wyle Coyote"<br><we@acme.example.com> | 3    | 1      | Create       | Create       |      |

2.41: Customer Users

1. [Placeholder]
2. [Placeholder]
3. [Placeholder]

[Placeholder]

1. [Placeholder]
2. [Placeholder]

[Placeholder]

1. [Placeholder]
2. [Placeholder]

[Placeholder]

1. [Placeholder]
2. [Placeholder]

The following widgets display tickets related to a customer.

Each ticket widget has an own filter for displaying:

- [Placeholder]
- [Placeholder]
- [Placeholder]

[Placeholder]

| Reminder Tickets      |  |                          |     |                        |
|-----------------------|--|--------------------------|-----|------------------------|
| My locked tickets (0) |  | Tickets in My Queues (0) |     | <b>All tickets (0)</b> |
|                       |  | TICKET#                  | AGE | TITLE                  |
| none                  |  |                          |     |                        |

2.42: [Placeholder]

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

| Escalated Tickets     |  |                          |     |                        |
|-----------------------|--|--------------------------|-----|------------------------|
| My locked tickets (0) |  | Tickets in My Queues (0) |     | <b>All tickets (0)</b> |
|                       |  | TICKET#                  | AGE | TITLE                  |
| none                  |  |                          |     |                        |

2.43: [Placeholder]

[Placeholder]

[Placeholder]

**New Tickets**

My locked tickets (1)   Tickets in My Queues (0)   **All tickets (1)**

|   | TICKET#          | ▼ AGE      | TITLE            |
|---|------------------|------------|------------------|
| ■ | 2015071510123456 | 122 d 22 h | Welcome to OTRS! |

2.44: Ticket list

**Open Tickets**

My locked tickets (0)   Tickets in My Queues (0)   **All tickets (0)**

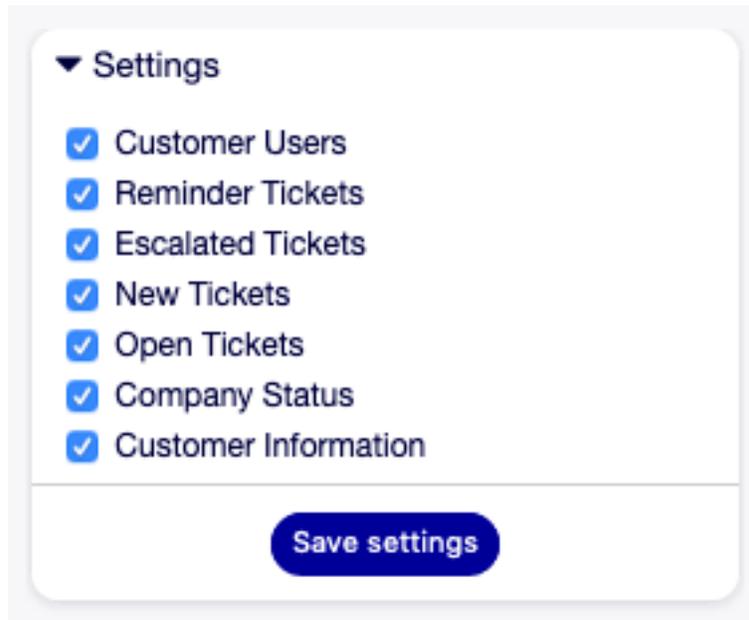
|      | TICKET# | ▼ AGE | TITLE |
|------|---------|-------|-------|
| none |         |       |       |

2.45: Empty ticket list

XXXXXXXXXXXXXXXX

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 are also displayed here.

XX XXXXXXXXXXXXXXXXXXXX



2.46: Settings widget

XXXXXXXXXXXXXXXX

1. XXXXXXXXXXXXXXXXXXXX XX XXXX
2. XXXXXXXXXXXXXXX
3. XX XXXX XXX

Figure 2.47: Company Status



Figure 2.47: Company Status

Figure 2.48: Customer Information

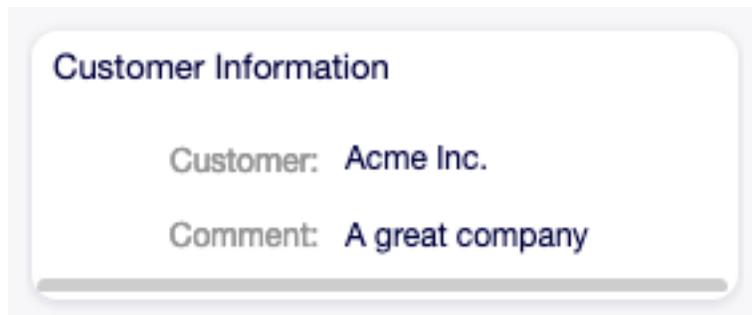


Figure 2.48: Customer Information

Figure 2.49:

Customer User Information Center

### 2.3.2 Customer User Information Center

Customer user information center is a dashboard, which displays all relevant tickets and customers of a customer user. This dashboard has the same purpose as the agent dashboard: to see all relevant information at a glance.

Customer user information center is a dashboard, which displays all relevant tickets and customers of a customer user.

Customer User Information Center

Clicking on the Customer User Information Center menu item will open a search dialog to search a customer user. At least two characters need to be entered here.

Customer User Information Center



Figure 2.49: Customer User Search

The following table lists the widgets that display tickets related to a customer user.

Table 2.49: Customer User Search Widgets

Table:

Table with 2 columns: Widget Name, Description

1. Customer User Search
2. Customer User
3. Customer User Tickets

Table with 2 columns: Widget Name, Description

1. Customer User
2. Customer User Tickets

Table with 2 columns: Widget Name, Description

1. Customer User Tickets
2. Customer User

The following widgets display tickets related to a customer user.

Each ticket widget has an own filter for displaying:

- Customer User
- Customer User
- Customer User
- Customer User Tickets
- Customer User

Table with 2 columns: Widget Name, Description

Customer User Information Center – "Wyle Coyote" <we@acme.example.com>

Customer IDs

[Change Customer Relations](#)

| CUSTOMER ID | NAME      | OPEN | CLOSED | EDIT |
|-------------|-----------|------|--------|------|
| acme.co     | Acme Inc. | 3    | 1      |      |

Settings

Customer User Information

Firstname: Wyle  
 Lastname: Coyote  
 Username: we  
 Email: we@acme.example.com

Customer Information

Customer: Acme Inc.  
 Comment: A great company

Reminder Tickets

Assigned to customer user | Accessible for customer user | My locked tickets (0) | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

Escalated Tickets

Assigned to customer user | Accessible for customer user | My locked tickets (0) | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

New Tickets

Assigned to customer user | Accessible for customer user | My locked tickets (0) | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

Open Tickets

Assigned to customer user | Accessible for customer user | My locked tickets (2) | My responsibilities (3) |

Tickets in My Queues (3) | Tickets in My Services (0) | All tickets (3)

| TICKET#          | AGE      | TITLE   |
|------------------|----------|---|
| 2020112549000027 | 7 d 20 h | Test Internal Helpdesk (Dynamic Field) Network Operations |
| 2020112549000018 | 7 d 22 h | Test Internal Helpdesk (Dynamic Field)                    |
| 2020111949000011 | 14 d 1 h | User cannot login to his mail account                     |

2.50: Customer User Information Center

Customer IDs

| CUSTOMER ID      | NAME             | OPEN | CLOSED | EDIT |
|------------------|------------------|------|--------|------|
| stark-industries | Stark Industries | 0    | 0      |      |

2.51: Customer ID

Reminder Tickets

Assigned to customer user | Accessible for customer user | My locked tickets (0) | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

2.52: Reminder Tickets

**Escalated Tickets**

**Assigned to customer user** | Accessible for customer user | My locked tickets (0) | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | **All tickets (0)**

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

2.53: Escalated Tickets

**New Tickets**

**Assigned to customer user** | Accessible for customer user | My locked tickets (0) | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | **All tickets (0)**

| TICKET# | AGE | TITLE |
|---------|-----|-------|
| none    |     |       |

2.54: New Tickets

**Open Tickets**

**Assigned to customer user** | Accessible for customer user | My locked tickets (2) | My responsibilities (3) |

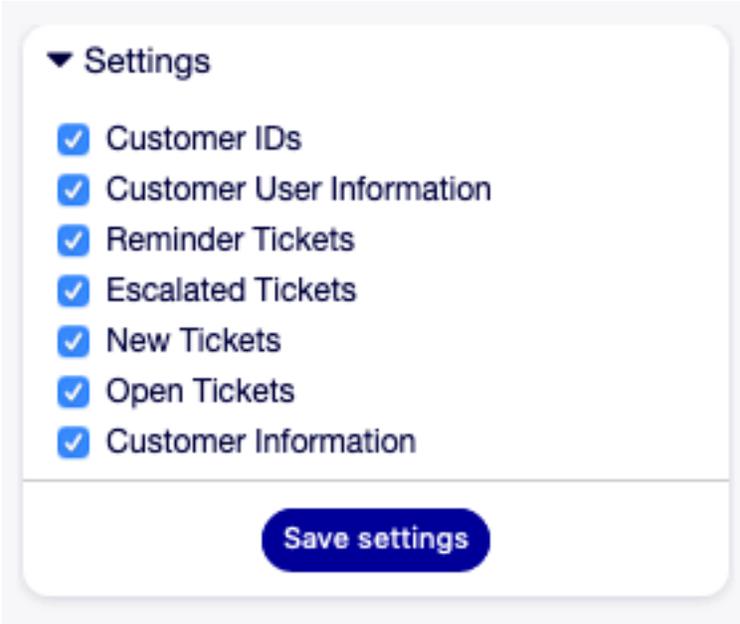
Tickets in My Queues (3) | Tickets in My Services (0) | **All tickets (3)**

| TICKET#          | AGE      | TITLE   |
|------------------|----------|---|
| 2020112549000027 | 7 d 20 h | Test Internal Helpdesk (Dynamic Field) Network Operations |
| 2020112549000018 | 7 d 22 h | Test Internal Helpdesk (Dynamic Field)                    |
| 2020111949000011 | 14 d 1 h | User cannot login to his mail account                     |

2.55: Open Tickets

XXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXX XXX XXX  
XXX XXXXXXXXXXXXXXXXXXXXXXX

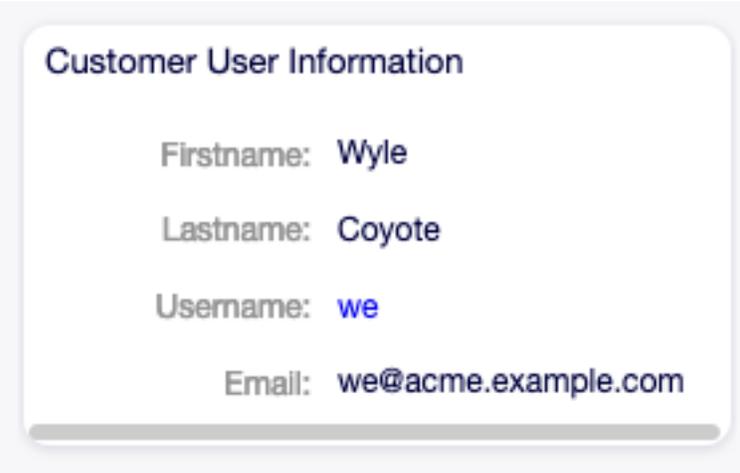


2.56: XXX XXX

XXXXXXXXXXXXXXXXXXXX

1. XXXXXXXXXXXXXXXXXXXXXXX XXX XXXXX
2. XXXXXXXXXXXXXXX
3. XXX XXXXX XXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXX



2.57: XXXXXXX XXX

Figure 2.58: Customer Information

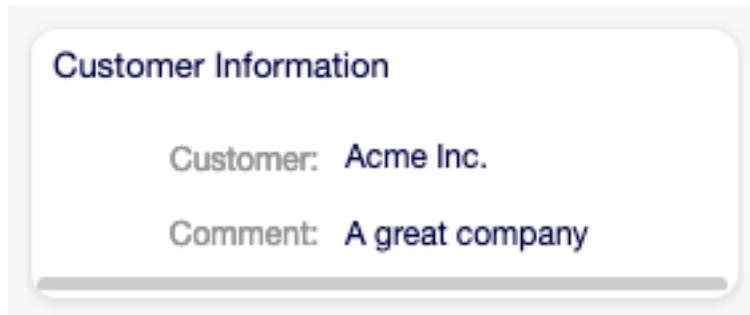


Figure 2.58: Customer Information

Figure 2.59:

Customer User Management

### 2.3.3 Customer User Management

OTOBO offers a great way to save individual information about contacts within organizations which your company serves. You can add as many personal connections into OTOBO as needed.

Use this screen to add a customer user to the system. A fresh OTOBO installation contains no customer users by default. The customer user management screen is available in the Customer User Administration menu item of the Customers menu.

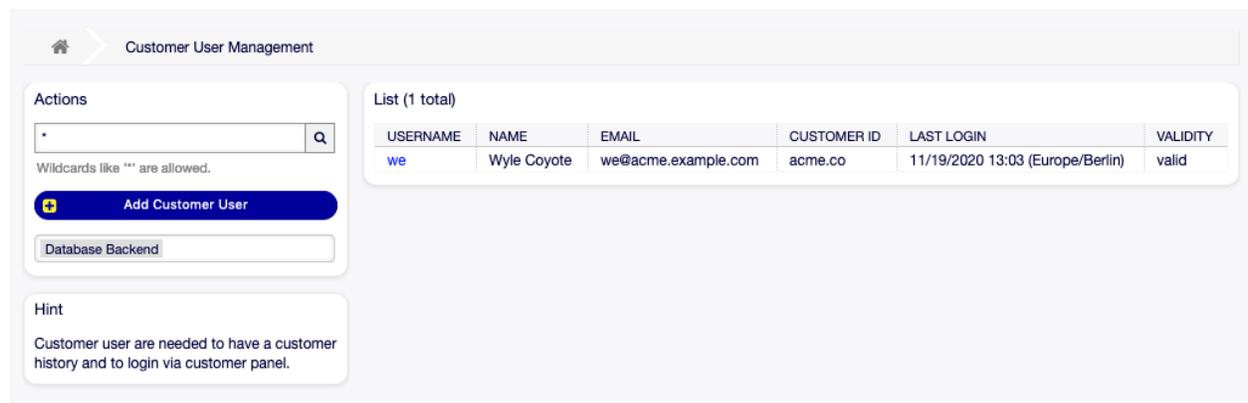


Figure 2.59: Customer User Management

Figure 2.60:



Figure 2.61: LDAP Authentication



Add Customer User

Title or salutation:

\* Firstname:

\* Lastname:

\* Username:

Password:

\* Email:

\* CustomerID:

Phone:

Fax:

Mobile:

Street:

Zip:

City:

Country:

Comment:

\* Valid:

Google Authenticator:

Enter your shared secret to enable two factor authentication. WARNING: Make sure that you add the shared secret to your generator application and the application works well. Otherwise you will be not able to login anymore without the two factor token.Shared Secret

Interface language:

Select the main interface language.Language

Time Zone:

Select your personal time zone. All times will be displayed relative to this time zone.Time Zone

Ticket overview:

Select after which period ticket overviews should refresh automatically.Refresh interval

Number of displayed tickets:

Select how many tickets should be shown in overviews by default.Tickets per page

PGP Key:  Keine Datei ausgewählt.

Upload your PGP key.PGP Key

**Save** or Cancel

Edit Customer User

Title or salutation:

\* Firstname:

\* Lastname:

\* Username:

Password:

\* Email:

\* CustomerID:

Phone:

Fax:

Mobile:

Street:

Zip:

City:

Country:

Comment:

\* Valid:

Google Authenticator:

Enter your shared secret to enable two factor authentication. WARNING: Make sure that you add the shared secret to your generator application and the application works well. Otherwise you will be not able to login anymore without the two factor token.Shared Secret

Interface language:

Select the main interface language.Language

Time Zone:

Select your personal time zone. All times will be displayed relative to this time zone.Time Zone

Ticket overview:

Select after which period ticket overviews should refresh automatically.Refresh interval

Number of displayed tickets:

Select how many tickets should be shown in overviews by default.Tickets per page

PGP Key:  Keine Datei ausgewählt.

Upload your PGP key.PGP Key

**Save** or **Save and finish** or **Cancel**

**Effective Permissions for Customer User**

**Group Permissions**

| GROUP | RO | RW |
|-------|----|----|
| users | ✓  | ✓  |

Table above shows effective group permissions for the customer user. The matrix takes into account all inherited permissions (e.g. via customer groups). Note: The table does not consider changes made to this form without submitting it.

**Customer Access**

| CUSTOMER          | DIRECT |
|-------------------|--------|
| acme.co Acme Inc. | ✓      |

Table above shows granted customer access for the customer user by permission context. The matrix takes into account all inherited access (e.g. via customer groups). Note: The table does not consider changes made to this form without submitting it.

2.62: Effective Permissions for Customer User

1. Add Customer

2. Add Customer

3. Add Customer

4. Add Customer/Details

5. Add Customer/Details/Permissions

\* Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the resource.

### 2.3.4 Add Customer

Use this screen to add customer companies to the system. A fresh OTOBO installation contains no customers by default. The customer management screen is available in the Customer Administration menu item of the Customers menu.

Customer Management

Actions

Wildcards like \*\* are allowed.

**Add Customer**

Database Backend

(1 total)

| CUSTOMER ID | NAME      | COMMENT         | VALIDITY | CHANGED                          | CREATED                          |
|-------------|-----------|-----------------|----------|----------------------------------|----------------------------------|
| acme.co     | Acme Inc. | A great company | valid    | 11/02/2020 13:35 (Europe/Berlin) | 11/02/2020 13:35 (Europe/Berlin) |

2.63: Customer Management

1. Add Customer

2. Add Customer/Details/Permissions

1. 1. 2. 3.

1. 1. 2. 3.
2. 1. 2. 3.
3. 1. 2. 3.

**Add Customer**

\* CustomerID:

\* Customer:

Street:

Zip:

City:

Country:

URL:

Comment:

\* Valid:

**Save** or Cancel

2.64: 1. 2. 3.

1. 1. 2. 3.

1. 1. 2. 3.

1. 1. 2. 3.
2. 1. 2. 3.
3. 1. 2. 3.

1. 1. 2. 3.

1. 1. 2. 3.
2. 1. 2. 3.

1. 1. 2. 3.

1. 1. 2. 3.

1. 1. 2. 3.

1. 1. 2. 3.

1. 1. 2. 3.

**Edit Customer**

★ CustomerID:

★ Customer:

Street:

Zip:

City:

Country:

URL:

Comment:

★ Valid:

or 
  or

2.65: Edit Customer

CustomerID

Customer

Street

Zip

City

Country

URL \* Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the resource.

## 2.4 Calendars

Calendars allow management of appointments and resources inside the ticket system.

OTOBO supports this requirement with calendars. Calendars allow management of appointments and resources inside the ticket system. You can connect your tickets to scheduled tasks and make them available to all users to see. This feature adds transparency to show your team’s workload and prevent users from promising resources which are not available.

### 2.4.1 Overview

Calendars are used to manage appointments and resources.

Example: A calendar for a team of agents.

Calendars can be used to manage appointments and resources.

**Calendar Overview**

|         |   |
|---------|---|
| Actions | Calendar  |
|         | No calendars found. Please add a calendar first by using Manage Calendars page. |

2.66: [Screenshot]

**Calendar**

Month Week Day Timeline Month Timeline Week Timeline Day Jump Today < >

**30 Nov – 6 Dec 2020 #49**

| MON, 30 NOV |    |    |    |    |    |    | TUE, 1 DEC |    |    |    |    |    |    | WED, 2 DEC |    |    |    |    |    |    |    |    |    |    |    |    |
|-------------|----|----|----|----|----|----|------------|----|----|----|----|----|----|------------|----|----|----|----|----|----|----|----|----|----|----|----|
| 06          | 08 | 10 | 12 | 14 | 16 | 18 | 20         | 22 | 00 | 02 | 04 | 06 | 08 | 10         | 12 | 14 | 16 | 18 | 20 | 22 | 00 | 02 | 04 | 06 | 08 | 10 |
|             |    |    |    |    |    |    |            |    |    |    |    |    |    |            |    |    |    |    |    |    |    |    |    |    |    |    |

2.67: [Screenshot]

Figure 2.68: Calendars

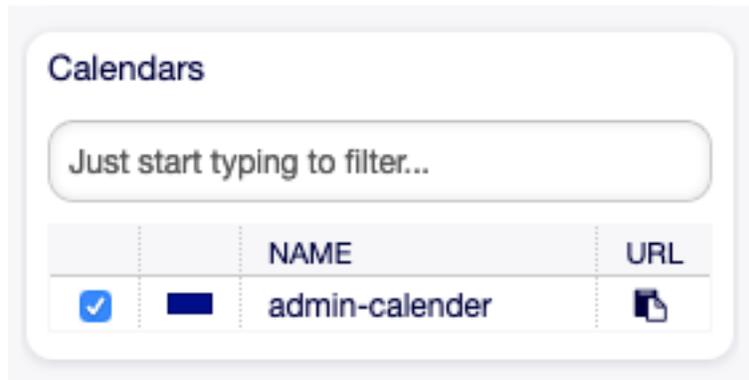


Figure 2.68: Calendars

Procedure

1. Click the **Calendars** URL in the URL list.
2. Click **Calendars**.
3. URL.

Note: The following steps are performed in the OTOBO user interface.

Procedure

Procedure

1. Click **Calendars** in the URL list.
2. Click **Calendars**.
3. URL.

Note:

The following steps are performed in the OTOBO user interface.

Procedure

1. Click **Calendars** in the URL list.
2. Click **Calendars**.
3. URL.

Procedure

1. Click **Calendars** in the URL list.
2. URL.

Procedure

1. Click **Calendars** in the URL list.
2. URL.
3. Click **Calendars** in the URL list.

Appointment



**Basic information**

\* Title:

Description:

Location:

\* Calendar:

**Resource**

This feature is currently not available.

**Date/Time**

Start date:  /  /  -  :

End date:  /  /  -  :

All-day:

Repeat:

**Notification**

Notification:

**Link**

Ticket:

2.69: 2.69

## Appointment



### Basic information

\* Title:

Description:

Location:

\* Calendar:

### Resource

This feature is currently not available.

### Date/Time

Start date:  /  /  -  :

End date:  /  /  -  :

All-day:

Repeat:

### Notification

Notification:

### Link

Ticket:

2.70: [REDACTED]

## 2.4.2

**Agenda Overview**

Month Week Day

11/23/2020 – 11/29/2020 #48

| CALENDAR       | TITLE | START DATE | END DATE | ALL-DAY | REPEAT | NOTIFICATION |
|----------------|-------|------------|----------|---------|--------|--------------|
| No data found. |       |            |          |         |        |              |

2.71:

**Agenda Overview**

Month Week Day

11/30/2020 – 12/06/2020 #49

| CALENDAR       | TITLE            | START DATE                          | END DATE                            | ALL-DAY | REPEAT | NOTIFICATION |
|----------------|------------------|-------------------------------------|-------------------------------------|---------|--------|--------------|
| 12/03/2020     |                  |                                     |                                     |         |        |              |
| admin-calender | Customer Meeting | 12/03/2020 18:00:00 (Europe/Berlin) | 12/03/2020 19:00:00 (Europe/Berlin) | No      | No     | No           |

2.72:

## 2.4.3

: Rother OSS TODO: This feature will be included in one of the next OTOBO releases. If you need it beforehand, please contact [sales@otobo.de](mailto:sales@otobo.de), we will find a solution.

## 2.4.4

Use this menu item to add new appointments to calendars. New appointments can be also added by clicking on the Add Appointment button either in or in screens. It is also possible to drag over a range of the calendar widget to setup a rough time span. Right after that, a dialog appears where the data can be inserted.



Upgrade to **OTRS** service package. Please contact us at [sales@otrs.com](mailto:sales@otrs.com) for an upgrade.

Find out more

2.73: AgentAppointments

AgentAppointments is a feature that allows you to create appointments in Google Calendar.

Notes:

AgentAppointmentsEdit::Location::Link

\* AgentAppointments

Rother OSS TODO: This feature will be included in one of the next OTOBO releases. If you need it beforehand, please contact [sales@otobo.de](mailto:sales@otobo.de), we will find a solution.

AgentAppointments

AgentAppointments

AgentAppointments 00:00

AgentAppointments

AgentAppointments

Notes:

AgentAppointments

AgentAppointments

AgentAppointments\* AgentAppointments\*\*

AgentAppointments

If appointments need to be created in a recurring manner, it is possible to setup detailed information about the occurrences of an appointment.

AgentAppointments

Appointment



**Basic information**

\* Title:

Description:

Location:

\* Calendar:

**Resource**

This feature is currently not available.

**Date/Time**

Start date:  /  /  -  :

End date:  /  /  -  :

All-day:

Repeat:

**Notification**

Notification:

**Link**

Ticket:

2.74: 2.74

1. [Placeholder]
2. [Placeholder]
3. [Placeholder]

**Date/Time**

---

Start date: 12 / 01 / 2020 - 08 : 00

End date: 12 / 01 / 2020 - 16 : 00

All-day:

Repeat: Every Day

until ...

12 / 06 / 2020

2.75: [Placeholder]

[Placeholder]

**Calendar**

Month Week Day Timeline Month Timeline Week Timeline Day

Jump Today < >

**30 Nov – 6 Dec 2020 #49**

| TUE, 1 DEC      |    |    |    |    |    |    | WED, 2 DEC      |    |    |    |    |    |    | THU, 3 DEC   |    |    |    |    |    |    |    |    |    |    |    |    |    |
|-----------------|----|----|----|----|----|----|-----------------|----|----|----|----|----|----|--------------|----|----|----|----|----|----|----|----|----|----|----|----|----|
| 6               | 08 | 10 | 12 | 14 | 16 | 18 | 20              | 22 | 00 | 02 | 04 | 06 | 08 | 10           | 12 | 14 | 16 | 18 | 20 | 22 | 00 | 02 | 04 | 06 | 08 | 10 | 12 |
| Regular Meeting |    |    |    |    |    |    | Regular Meeting |    |    |    |    |    |    | Regular Meet |    |    |    |    |    |    |    |    |    |    |    |    |    |

2.76: [Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

## 2.5 [Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

[Placeholder]

Ticket systems such as OTOBO handle tickets like normal emails. The messages are saved in the system. When a customer sends a request, a new ticket is generated by the system which is comparable to a new medical report being created. The response to this new ticket is comparable to a doctor’s entry in the medical report. A ticket is closed if an answer is sent back to the customer, or if the ticket is



**Ticket#2020111949000011 – User cannot login to his mail account**

Back | Lock | Priority | Change Ticket | People | Communication | Pending | Close | Quick Close | Miscellaneous |

- Move -

▼ Article Overview - 1 Article(s)

| NO. | ★ | ⇄ | SENDER      | VIA   | SUBJECT                       | CREATED          |  |
|-----|---|---|-------------|-------|-------------------------------|------------------|--|
| 1   |   | ← | Wyle Coyote | Phone | User cannot login to his mail | 11/19/2020 13:07 |  |

▼ #1 – User cannot login to his mail account – Wyle Coyote – 11/19/2020 13:07 (Europe/Berlin) vi...

To open links in the following article, you might need to press Ctrl or Cmd or Shift key while clicking the link (depending on your browser and OS).

Mark | Print | Split | Forward | Reply

The user reports outlook will not accept his password.

▼ Ticket Information

Age: 14 d 21 h  
 Created: 11/19/2020 13:07 (Europe/Berlin)  
 Created by: Super Admin  
 State: open  
 Locked: unlock  
 Priority: 3 normal  
 Queue: Misc  
 Customer ID: [acme.co](#)  
 Accounted time: 0  
 Owner: Super Admin  
 Responsible: Admin OTOBO

▼ Customer Information

Firstname: Wyle  
 Lastname: Coyote  
 Username: we  
 Email: [we@acme.example.com](mailto:we@acme.example.com)  
 Customer: Acme Inc.  
 Street: 123 Anywhere St.  
 Zip: 12346  
 City: Somevillage  
 Country: United States of [...]  
 URL: [https://acme.exam\[...\]](https://acme.exam[...])  
 Comment: A great company  
 Open tickets (customer) (3)

2.78:

**QueueView: Raw**

My Queues (0) Misc (3/1) **Raw (4/3)**

All tickets 4 Available tickets 3

Bulk 1-4 of 4 **S** M L

2.79:

**QueueView: Misc**

My Queues (0) **Misc (3/1)** Raw (4/3)

All tickets 3 Available tickets 1

Bulk 1-3 of 3 S M L

| <input type="checkbox"/> |   | TICKET#            | ▲ AGE     | SENDER      | TITLE   | STATE | LOCK   | QUEUE | OWNER       | CUSTOMER ID |
|--------------------------|---|--------------------|-----------|-------------|---|-------|--------|-------|-------------|-------------|
| <input type="checkbox"/> | ■ | 2020111949000011   | 14 d 21 h | Wyle Coyote | User cannot login to his mail account                     | open  | unlock | Misc  | Super Admin | acme.co     |
| <input type="checkbox"/> | ■ | ★ 2020112549000018 | 8 d 18 h  | Wyle Coyote | Test Internal Helpdesk (Dynamic Field)                    | open  | lock   | Misc  | Admin OTOBO | acme.co     |
| <input type="checkbox"/> | ■ | ★ 2020112549000027 | 8 d 15 h  | Wyle Coyote | Test Internal Helpdesk (Dynamic Field) Network Operations | open  | lock   | Misc  | Admin OTOBO | acme.co     |

Powered by Rother OSS

2.80: [REDACTED]

To sort tickets:

1. [REDACTED]
2. [REDACTED]

[REDACTED]

[REDACTED]

1. [REDACTED]
2. [REDACTED]

[REDACTED]

[REDACTED]

**QueueView: Misc**

My Queues (0) **Misc (3/1)** Raw (4/3)

All tickets 3 Available tickets 1

Bulk Lock Zoom History Priority Note Close Quick Close - Move - 1-3 of 3 S M L

[REDACTED]

[REDACTED] Unlock a ticket to give it back to the queue.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] Close this ticket.

**Quick Close** Close this ticket by one click.

[REDACTED]



**QueueView: Misc**

My Queues (0) Misc (3/1) Raw (4/3)

All tickets 3 Available tickets 1

Bulk | Order by "Age" (descending) 1-3 of 3 S M L

**Ticket#2020111949000011 – User cannot login to hi...**

|  |                       |
|--|-----------------------|
| <b>Age</b><br>14 d 21 h                                | <b>Queue</b><br>Misc  |
| <b>Created</b><br>11/19/2020 13:07:51 (E...            | <b>State</b><br>open  |
| <b>Owner / Responsible</b><br>Super Admin / Admin O... | <b>Lock</b><br>unlock |
| <b>Customer ID</b><br><a href="#">acme.co</a>          |                       |

"Wyle Coyote" <we@acme.example.com> – User cannot login to his mail account

Print | Split | Forward | Reply

The user reports outlook will not accept his password.

2.83: [Screenshot]

**QueueView: Misc**

My Queues (0) Misc (3/1) Raw (4/3)

All tickets 3 Available tickets 1

Bulk | Order by "Age" (descending) 1-3 of 3 S M L

**Ticket#2020111949000011 – User cannot login to hi...**

|  |                       |
|--|-----------------------|
| <b>Age</b><br>14 d 21 h                                | <b>Queue</b><br>Misc  |
| <b>Created</b><br>11/19/2020 13:07:51 (E...            | <b>State</b><br>open  |
| <b>Owner / Responsible</b><br>Super Admin / Admin O... | <b>Lock</b><br>unlock |
| <b>Customer ID</b><br><a href="#">acme.co</a>          |                       |

Lock | Zoom | History | Priority | Note | Close | Quick Close | - Move -

"Wyle Coyote" <we@acme.example.com> – User cannot login to his mail account

Print | Split | Forward | Reply

The user reports outlook will not accept his password.

2.84: [Screenshot]

Figure 2.85: Ticket Bulk Action

Figure 2.85: Ticket Bulk Action

**Ticket Bulk Action** Cancel & close

▶ Add Note

▶ Send Email

Next state:

Queue:

Owner:

Responsible:

Priority:

Merge:  Merge to Ticket#:   Merge to oldest

Link together:

Link to parent:

Unlock tickets:

**Execute Bulk Action**

Figure 2.85: Ticket Bulk Action

## 2.5.2 Ticket

Figure 2.86: Ticket

Figure 2.86: Ticket

Figure 2.86: Ticket

Figure 2.86: Ticket

**Service View: Computer**

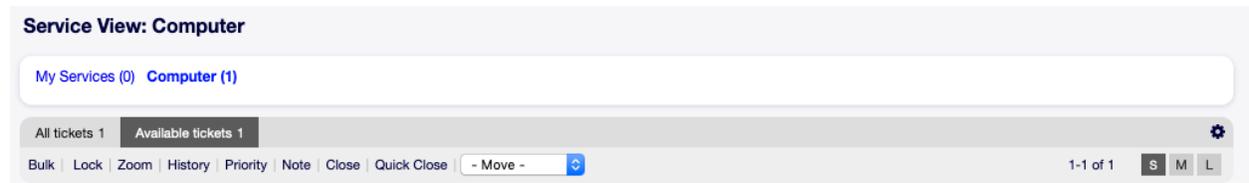
My Services (0) **Computer (1)**

All tickets 1 Available tickets 1 1-1 of 1 S M L

Bulk

Figure 2.86: Ticket





Unlock a ticket to give it back to the queue.

1. Click the lock icon.

2. Click the unlock icon.

3. The ticket is unlocked.

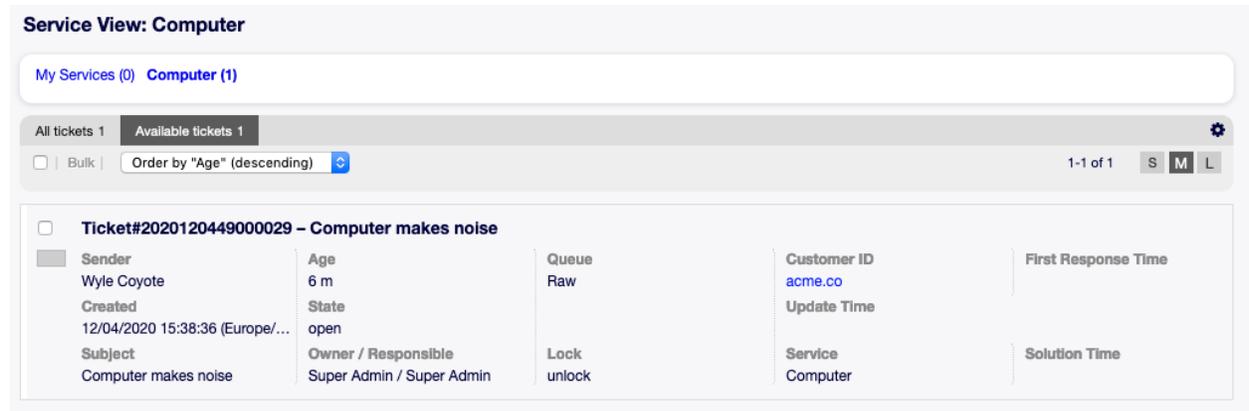
Close this ticket.

**Quick Close** Close this ticket by one click.

The ticket can be moved to an other queue..

1. Click the Move icon.

2. Select the queue.



2.88: Ticket details view

1. Click the Move icon.

1. Click the Move icon.

2. Select the queue.

3. The ticket is moved.

The ticket can be moved to an other queue..

1. Click the Move icon.

2. Select the queue.

3. The ticket is moved.

1. Click the Move icon.

**Service View: Computer**

My Services (0) **Computer (1)**

All tickets 1 Available tickets 1

Bulk | Order by "Age" (descending) 1-1 of 1 S M L

**Ticket#2020120449000029 – Computer makes noise** Lock Zoom History Priority Note Close Quick Close - Move -

|   |   |                       |                               |                            |
|---|---|-----------------------|-------------------------------|----------------------------|
| <b>Sender</b><br>Wyle Coyote                      | <b>Age</b><br>6 m                                       | <b>Queue</b><br>Raw   | <b>Customer ID</b><br>acme.co | <b>First Response Time</b> |
| <b>Created</b><br>12/04/2020 15:38:36 (Europe/... | <b>State</b><br>open                                    |                       | <b>Update Time</b>            |                            |
| <b>Subject</b><br>Computer makes noise            | <b>Owner / Responsible</b><br>Super Admin / Super Admin | <b>Lock</b><br>unlock | <b>Service</b><br>Computer    | <b>Solution Time</b>       |

2.89: [Screenshot]

**Service View: Computer**

My Services (0) **Computer (1)**

All tickets 1 Available tickets 1

Bulk | Order by "Age" (descending) 1-1 of 1 S M L

**Ticket#2020120449000029 – Computer makes noise**

|   |                       |  |  |
|---|-----------------------|--|--|
| <b>Age</b><br>10 m                                      | <b>Queue</b><br>Raw   | <b>"Wyle Coyote" &lt;we@acme.example.com&gt; – Computer makes noise</b> 12/04/2020 15:38 (Europe/Berlin) |  |
| <b>Created</b><br>12/04/2020 15:38:36 (E...             | <b>State</b><br>open  | Print   Split   Forward   Reply <input type="text"/>   |  |
| <b>Service</b><br>Computer                              |                       | Running computer makes an unusual loud noise.  |  |
| <b>Owner / Responsible</b><br>Super Admin / Super Ad... | <b>Lock</b><br>unlock |  |  |
| <b>Customer ID</b><br>acme.co                           |                       |  |  |

2.90: [Screenshot]



2.5.3

...
...small M ...
...medium L ...
...large



2.93: ...

...

...

...

Table with columns: TICKET#, AGE, SENDER, TITLE, STATE, LOCK, QUEUE, OWNER, CUSTOMER ID. Contains two rows of ticket data.

2.94: ...

...

- 1. ...
2. ...
3. ...

...

- 1. ...
2. ...
3. ...
4. ...

...

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

To sort tickets:

- 1. ...
2. ...



Status View: Open tickets

Open tickets 9 Closed tickets 1

Bulk | Order by "Age" (ascending) | 1-9 of 9 | S M L

Lock | Zoom | History | Priority | Note | Close | Quick Close | - Move -

|   |  |                |                        |                     |
|---|--|----------------|------------------------|---------------------|
| <b>Ticket#2020120449000029 – Computer makes noise</b> | Age<br>28 m                                      | Queue<br>Raw   | Customer ID<br>acme.co | First Response Time |
| Sender<br>Wyle Coyote                                 | State<br>open                                    | Lock<br>unlock | Update Time            |                     |
| Created<br>12/04/2020 15:38:36 (Europe/...            | Owner / Responsible<br>Super Admin / Super Admin |                | Service<br>Computer    | Solution Time       |
| Subject<br>Computer makes noise                       |  |                |                        |                     |

2.96:

Status View: Open tickets

Open tickets 9 Closed tickets 1

Bulk | Order by "Age" (ascending) | 1-9 of 9 | S M L

Lock | Zoom | History | Priority | Note | Close | Quick Close | - Move -

|   |               |                |   |  |
|---|---------------|----------------|---|--|
| <b>Ticket#2020120449000029 – Computer makes noise</b> | Age<br>32 m   | Queue<br>Raw   | "Wyle Coyote" <we@acme.example.com> – Computer makes noise 12/04/2020 15:38 (Europe/Berlin) |  |
| Created<br>12/04/2020 15:38:36 (E...                  | State<br>open | Lock<br>unlock | Print   Split   Forward   Reply   |  |
| Service<br>Computer                                   |               |                | Running computer makes an unusual loud noise.   |  |
| Owner / Responsible<br>Super Admin / Super Ad...      |               |                |   |  |
| Customer ID<br>acme.co                                |               |                |   |  |

2.97:

- 1.
- 2.
- 3.

2.5.4

**Status View: Open tickets**

Open tickets 9 | Closed tickets 1

Bulk | Order by "Age" (ascending) | 1-9 of 9 | S M L

**Ticket#2020120449000029 – Computer makes noise** | Lock | Zoom | History | Priority | Note | Close | Quick Close | - Move -

|  |                |   |
|--|----------------|---|
| Age<br>32 m                                      | Queue<br>Raw   | "Wyle Coyote" <we@acme.example.com> – Computer makes noise   12/04/2020 15:38 (Europe/Berlin) |
| Created<br>12/04/2020 15:38:36 (E...)            | State<br>open  | Print   Split   Forward   Reply   |
| Service<br>Computer                              | Lock<br>unlock | Running computer makes an unusual loud noise.   |
| Owner / Responsible<br>Super Admin / Super Ad... |                |   |
| Customer ID<br>acme.co                           |                |   |

2.98: Ticket details view

**Ticket Bulk Action** | Cancel & close

▸ Add Note

▸ Send Email

Next state:

Queue:

Owner:

Responsible:

Priority:

Merge:  Merge to Ticket#:   Merge to oldest

Link together:

Link to parent:

Unlock tickets:

**Execute Bulk Action**

2.99: Bulk action form

**Ticket Escalation View: Today**

Today 0 | Tomorrow 0 | Next week 0

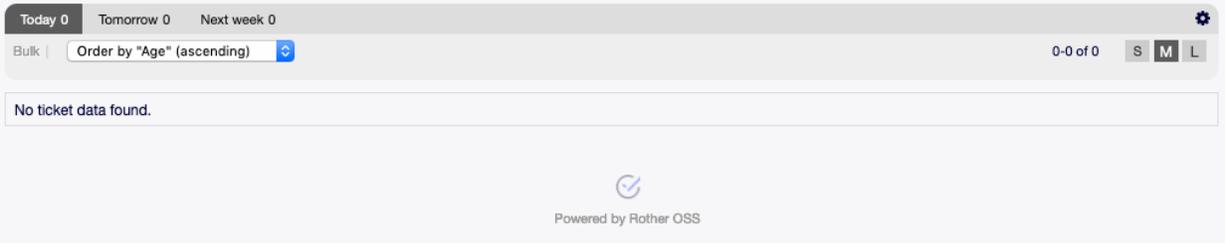
Bulk | 0-0 of 0 | S M L

2.100: Escalation view header



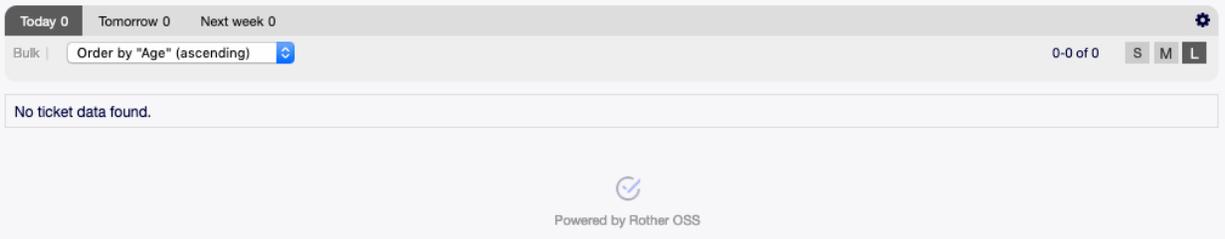


### Ticket Escalation View: Today



2.103: 票務升級視圖

### Ticket Escalation View: Today



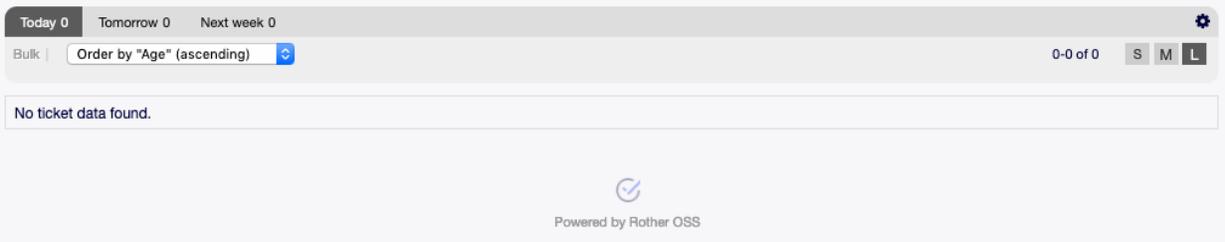
2.104: 票務升級視圖

2. 票務升級視圖

3. 票務升級視圖

票務升級視圖 票務升級視圖 票務升級視圖

### Ticket Escalation View: Today



2.105: 票務升級視圖

票務升級視圖

票務升級視圖

## 2.5.5 票務升級

票務升級視圖 票務升級視圖 票務升級視圖

票務升級視圖 票務升級視圖

票務升級 \* 票務升級視圖



### Create New Phone Ticket

★ Customer user:

👤 "Wyle Coyote" <we@acme.example.com> ✖

★ To queue:

Service:

Service Level Agreement:

Owner:  🔄

Responsible:  🔄

★ Subject:

Options: [ Customer user ] [ FAQ ]

Text Template:

Setting a template will overwrite any text or attachment.

★ Text:

**B I U S** | | | | | | | | | |

Format | Font | Size | **A** | **I**<sub>x</sub> | Source |

Attachments:

Click to select files or just drop them here.

Next ticket state:

Priority:

Time units (work units):

+ Create

**Customer Information**

Firstname: Wyle  
 Lastname: Coyote  
 Username: we  
 Email: we@acme.example.com  
 Customer: Acme Inc.  
 Street: 123 Anywhere St.  
 Zip: 12346  
 City: Somevillage  
 Country: United States of [...]  
 URL: [https://acme.exam\[...\]](https://acme.exam[...])  
 Comment: A great company  
● [Open tickets \(customer\) \(5\)](#)

2.107: [Screenshot]

OTOBOTicket::Category  
OTOBOTicket::Service

### 2.5.6 OTOBOTicket

OTOBOTicket::Category OTOBOTicket::Service  
OTOBOTicket::Service  
OTOBOTicket \* OTOBOTicket::Service

---

OTOBOTicket::Category

---

OTOBOTicket::Service  
OTOBOTicket \* OTOBOTicket::Service

OTOBOTicket The service category of this ticket.

OTOBOTicket::Service  
This field is available if Ticket::Service is enabled.

**Service Level Agreement** Select one of the Service Level Agreements if available.

OTOBOTicket::Responsible  
OTOBOTicket::Responsible

OTOBOTicket Select an agent responsible for the ticket.

OTOBOTicket \* OTOBOTicket::Responsible

OTOBOTicket::Responsible  
OTOBOTicket::Responsible  
OTOBOTicket::Responsible  
OTOBOTicket::Responsible

OTOBOTicket::Responsible

OTOBOTicket \* OTOBOTicket::Responsible

OTOBOTicket::Responsible  
OTOBOTicket::Responsible  
OTOBOTicket::Responsible  
OTOBOTicket::Responsible  
OTOBOTicket::Responsible  
OTOBOTicket::Responsible  
OTOBOTicket::Responsible  
OTOBOTicket::Responsible  
OTOBOTicket::Responsible



## 2.5.7

---

1. Select a process from the dropdown menu.

2. Click the "Create New Process Ticket" button.



2.109: 1. Select a process from the dropdown menu.

2. Click the "Create New Process Ticket" button.

3. \* Select a process from the dropdown menu.

4. Click the "Create New Process Ticket" button.

5. Select a process from the dropdown menu.

6. Click the "Create New Process Ticket" button.

---

7. The fields displayed depend on the process, therefore no explanation is described here for those fields.

---

## 2.5.8

1. Select a process from the dropdown menu.

2. Click the "Create New Process Ticket" button.

3. Click the "Create New Process Ticket" button.

4. Select a process from the dropdown menu.

5. Click the "Create New Process Ticket" button.

1. Select a process from the dropdown menu.
2. Click the "Create New Process Ticket" button.
3. Select a process from the dropdown menu.
4. Click the "Create New Process Ticket" button.

6. Click the "Create New Process Ticket" button.

1. Select a process from the dropdown menu.
2. Click the "Create New Process Ticket" button.

7. Select a process from the dropdown menu.

8. Click the "Create New Process Ticket" button.

1. Select a process from the dropdown menu.

### Create New Process Ticket

\*Process:

Subject:

Text:   
B I U S | | | | | | | | | | |   
 Format - | Font - | Size - | - - |

**Process Information**

Process: Book ordering

Activity: Recording the demand

Dialog: Recording the demand

Description: New demand

Attachments:

Title:

Author:

ISBN:

Status:

**Submit**

2.110: ████████████████████

**Search** ✕

---

**Templates**

Search template:

**Create New**

---

**Filters in use**

Fulltext:

---

**Additional filters**

Add another attribute:

Output:

**Run search**

2.111: ████████



2.5.9

Placeholder text line

**Ticket#2020111949000011 – User cannot login to his mail account**

Back | Lock | Priority | Change Ticket | People | Communication | Pending | Close | Quick Close | Miscellaneous |

- Move -

**Article Overview - 1 Article(s)**

| NO. | ☆ | ⇄ | SENDER      | VIA   | SUBJECT                       | CREATED          | 🔗 |
|-----|---|---|-------------|-------|-------------------------------|------------------|---|
| 1   |   | ← | Wyle Coyote | Phone | User cannot login to his mail | 11/19/2020 13:07 |   |

**#1 – User cannot login to his mail account – Wyle Coyote – 11/19/2020 13:07 (Europe/Berlin) vi...**

To open links in the following article, you might need to press Ctrl or Cmd or Shift key while clicking the link (depending on your browser and OS).

Mark | Print | Split | Forward | Reply

The user reports outlook will not accept his password.



**Ticket Information**

Age: 14 d 21 h  
 Created: 11/19/2020 13:07 (Europe/Berlin)  
 Created by: Super Admin  
 State: open  
 Locked: unlock  
 Priority: 3 normal  
 Queue: Misc  
 Customer ID: acme.co  
 Accounted time: 0  
 Owner: Super Admin  
 Responsible: Admin OTOBO

**Customer Information**

Firstname: Wyle  
 Lastname: Coyote  
 Username: we  
 Email: we@acme.example.com  
 Customer: Acme Inc.  
 Street: 123 Anywhere St.  
 Zip: 12346  
 City: Somevillage  
 Country: United States of [...]  
 URL: https://acme.exam[...]  
 Comment: A great company  
 🔴 Open tickets (customer) (3)

2.114: Placeholder

Placeholder text line

Placeholder text line

Placeholder text line

Placeholder text line

Back | Unlock | Priority | Change Ticket | People | Communication | Pending | Close | Quick Close | Process |

Miscellaneous | - Move -

2.115: Placeholder

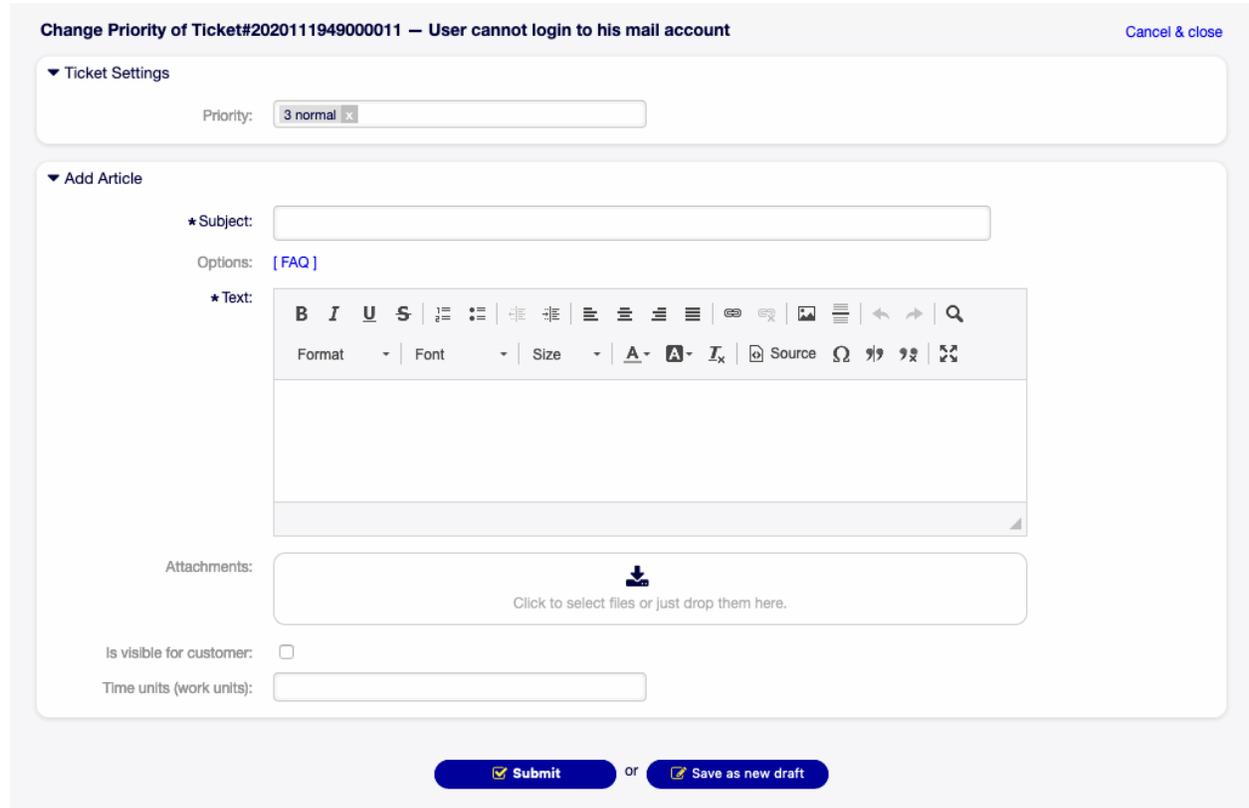
Placeholder text line

Placeholder text line

1. Select the ticket you want to edit.  
2. Select the ticket you want to edit.

3. Select the ticket you want to edit.

4. Select the ticket you want to edit.  
5. Select the ticket you want to edit.



2.116: Ticket Edit

1. Select the ticket you want to edit.  
2. \* Select the ticket you want to edit.  
3. Select the ticket you want to edit.  
4. \* Select the ticket you want to edit.  
5. Select the ticket you want to edit.  
6. Select the ticket you want to edit.  
7. Select the ticket you want to edit.

8. Select the ticket you want to edit.  
9. Select the ticket you want to edit.  
10. \* Select the ticket you want to edit.  
11. \* Select the ticket you want to edit.

**Change Owner of Ticket#202011194900011 – User cannot login to his mail account** Cancel & close

▼ Ticket Settings

\* New Owner:

▼ Add Article

\* Subject:

Options: [\[ FAQ \]](#)

\* Text:

**B I U S** | | | | | | | | | | | | | | |

Format | Font | Size | | | | | Source | | | |

Attachments:

Is visible for customer:

Time units (work units):

or

2.117: ██████████



**Add Note to Ticket#2020111949000011 – User cannot login to his mail account** Cancel & close

▼ Ticket Settings

Service:

Service Level Agreement:

▼ Add Article

\*Subject:

Options: [\[ FAQ \]](#)

\*Text:

**B I U S** | | | | | | | | | | | | | |

Format - | Font - | Size - | - | - | | | | | |

Attachments:

Is visible for customer:

Time units (work units):

or

2.119: [Screenshot]





**2.122:** You can select a customer user from OTOBO or any valid email address can be added here.

\*\*\*\*\*@\*\*\*\*\*.\*\*\*\*\*

**2.123:** \*\*\*\*\*

\*\*\*\*\*FAQ\*\*\*\*\*

**2.124:** \*\*\*\*\*

\*\*\*\*\*

\*\*\*\*\*

\*\*\*\*\*

\*\*\*\*\*

\*\*\*\*\*

\*\*\*\*\*

**Set Pending Time for Ticket#202011194900011 — User cannot login to his mail account** [Cancel & close](#)

**▼ Ticket Settings**

Next state:

Pending date:   :

For all pending\* states.

**▼ Add Article**

★ Subject:

Options: [\[ FAQ \]](#)

★ Text: 

**B I U S** | | | | | | | | | | | | |

Format | Font | Size | A | A | Ix | Source | Ω | ↶ | ↷ | 🔍

---

Attachments: 

Click to select files or just drop them here.

Is visible for customer:

Time units (work units):

or

**2.122:** \*\*\*\*\*

\*\*\*\*\*

\*\*\*\*\*

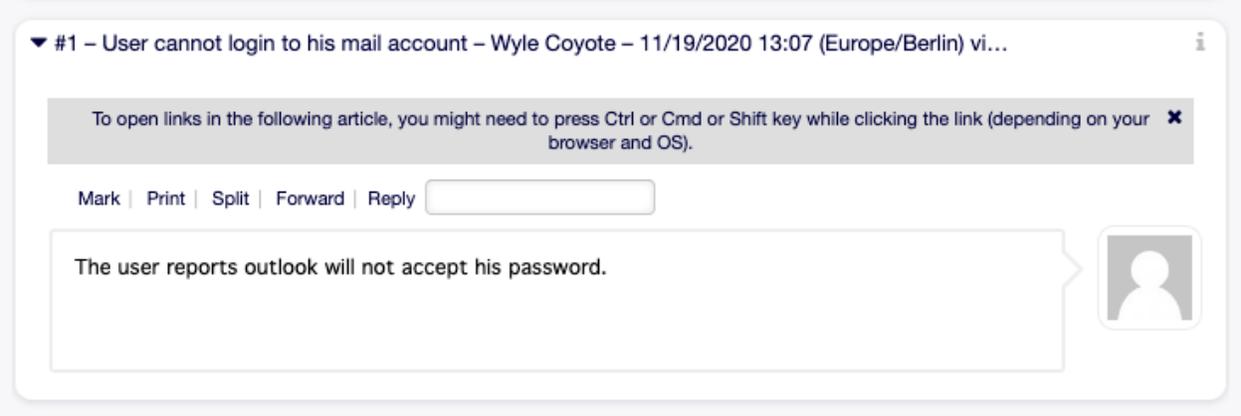
**2.123:** \*\*\*\*\*



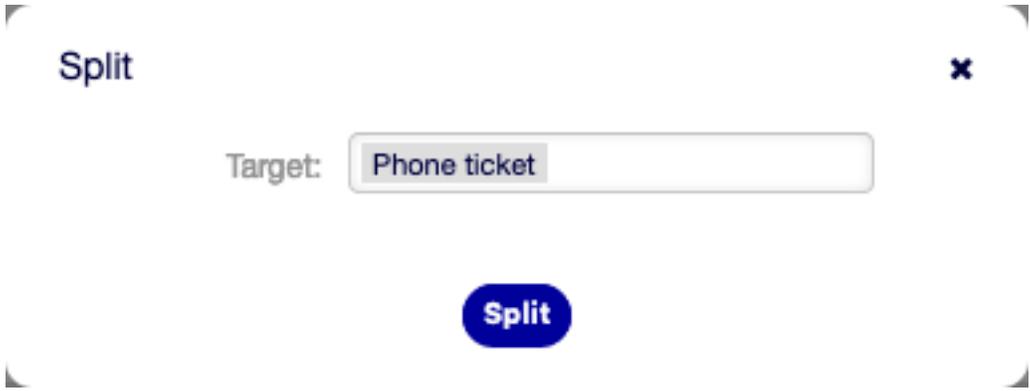








2.129: [redacted]



2.130: [redacted]

OTOBOSystem [Ticket#2020111949000011] User cannot login to his mail account

To: [Customer User]

OTOBOSystem [Ticket#2020111949000011] User cannot login to his mail account

**Forward Ticket#2020111949000011 – User cannot login to his mail account** Cancel & close

From: OTOBO System <otobo@localhost>

\* To:

Cc:

Bcc:

\* Subject: **Fwd: [Ticket#2020111949000011] User cannot login to his mail account**

Email security:

Sign:

Keys/certificates will only be shown for a sender with more than one key/certificate. The first found key/certificate will be pre-selected. Please make sure to select the correct one.

Encrypt:

Keys/certificates will only be shown for recipients with more than one key/certificate. The first found key/certificate will be pre-selected. Please make sure to select the correct one.

Options: [\[ FAQ \]](#)

\* Text:

**B I U S** | | | | | | | |

Format | Font | Size | **A** | **A** | **I** | Source | | |

---

Your Ticket-Team

Super Admin

Attachments:

Next ticket state:

Visible for customer:

Time units (work units):

or

2.131: Screenshot

OTOBOSystem [Ticket#2020111949000011] User cannot login to his mail account

To: You can select a customer user from OTOBO or any valid email address can be added here.

\*\*\*\*\*

\*

FAQ

\*

\*

: You can select a customer user from OTOBO or any valid email address can be added here.

\*\*\*\*\*

\*

FAQ

\*

:

LinkObject::ViewMode

**Compose Answer for Ticket#2020111949000011 – User cannot login to his mail account** Cancel & close

From: OTOBO System <otobo@localhost>

★ To:

To: "Wyle Coyote" <we@acme.example.com>

Cc:

Bcc:

★ Subject: **Re: [Ticket#2020111949000011] User cannot login to his mail account**

Email security:

Sign:

Keys/certificates will only be shown for a sender with more than one key/certificate. The first found key/certificate will be pre-selected. Please make sure to select the correct one.

Encrypt:

Keys/certificates will only be shown for recipients with more than one key/certificate. The first found key/certificate will be pre-selected. Please make sure to select the correct one.

Options: [\[ FAQ \]](#)

★ Text:

**B I U S** | | | | | | | | | | | | | |

Format | Font | Size | | | | Source | | | |

Dear Wyle Coyote,

Thank you for your request.

Your Ticket-Team

Super Admin

--

Super Support - Waterford Business Park  
 5201 Blue Lagoon Drive - 8th Floor & 9th Floor - Miami, 33126 USA  
 Email: hot@example.com - Web: <http://www.example.com/>

--

Attachments:

Click to select files or just drop them here.

Next ticket state:

Visible for customer:

Time units (work units):

Send mail or Save as new draft

2.132: ████████

▼ Linked: FAQ (1)

| FAQ#                  | TITLE                          | STATE               | CREATED                             | LINKED AS | DELETE |
|-----------------------|--------------------------------|---------------------|-------------------------------------|-----------|--------|
| <a href="#">49002</a> | How to create a support bundle | external (customer) | 11/18/2020 15:43:26 (Europe/Berlin) | Normal    |        |

2.133: ██████ █████

▼ Linked: FAQ (1)

| FAQ#                  | TITLE                          | STATE               | CREATED                             | LINKED AS | DELETE |
|-----------------------|--------------------------------|---------------------|-------------------------------------|-----------|--------|
| <a href="#">49002</a> | How to create a support bundle | external (customer) | 11/18/2020 15:43:26 (Europe/Berlin) | Normal    |        |

2.134:

▼ Ticket Information

Age: 74 d 1 h

Created: 09/21/2020 17:08 (Europe/Berlin)

State: new

Locked: lock

Priority: 3 normal

Queue: Raw

Customer ID:

Accounted time: 0

Owner: Admin OTOBO

Responsible: Admin OTOBO

2.135:

Figure 2.136

Customer Information

▼ Customer Information

Firstname: Wyle

Lastname: Coyote

Username: we

Email: we@acme.example.com

Customer: Acme Inc.

Street: 123 Anywhere St.

Zip: 12346

City: Somevillage

Country: United States of [...]

URL: https://acme.exam[...]

Comment: A great company

**Open tickets (customer)\_ (5)**

Figure 2.136: Customer Information

## 2.6 FAQ

FAQ

Creating FAQ articles should be done based on customer tickets. A good knowledge base contains all relevant information, that occurs during ticket handling. FAQ articles can be easily attached to new tickets in any ticket or article creation screens. This can help agents to shorten the time when answering a ticket.

### 2.6.1

FAQ

FAQ

**FAQ Explorer**

FAQ

**Subcategories**

| NAME | COMMENT      | SUBCATEGORIES | FAQ ARTICLES |
|------|--------------|---------------|--------------|
| Misc | Misc Comment | 0             | 2            |

**Latest created FAQ articles**

[How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

**FAQ Articles: FAQ**

0-0 of 0

No FAQ data found.

**Latest updated FAQ articles**

[How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

**Top 10 FAQ articles**

1. [Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

2. [How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

2.137: FAQ Explorer

FAQ Overview

The FAQ Explorer provides a comprehensive view of the FAQ database. It includes a subcategories table, a list of FAQ articles, and several summary widgets. The subcategories table shows the relationship between category names, comments, and the number of associated articles. The FAQ articles list is currently empty, indicating no data was found. The summary widgets provide insights into the most recent and most popular articles, such as 'How to create a support bundle' and 'Computer is dead'.

FAQ Top 10

The Top 10 FAQ articles widget displays the most frequently viewed or searched articles. The top two articles are 'Computer is dead' and 'How to create a support bundle', both from the 'Misc - en - external (customer)' category. The widget also includes a search bar and a filter icon for user interaction.

**FAQ Explorer**

FAQ > Misc

**Subcategories**

| NAME                    | COMMENT | SUBCATEGORIES | FAQ ARTICLES |
|-------------------------|---------|---------------|--------------|
| No subcategories found. |         |               |              |

**FAQ Articles: Misc**

1-2 of 2 S

| ▲ FAQ# | TITLE                          | LANGUAGE | STATE               | VALIDITY |
|--------|--------------------------------|----------|---------------------|----------|
| 49002  | How to create a support bundle | en       | external (customer) | valid    |
| 49001  | Computer is dead               | en       | external (customer) | valid    |

**Latest created FAQ articles**

[How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

**Latest updated FAQ articles**

[How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

**Top 10 FAQ articles**

1. [Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

2. [How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

2.138: FAQ

## 2.6.2

FAQ

\*

FAQ

\*

:

FAQ

( ) FAQ

( ) FAQ

( ) FAQ

Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the resource.

:

FAQ

### Latest created FAQ articles

[How to create a support bundle](#)

Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)

Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

### Latest updated FAQ articles

[How to create a support bundle](#)

Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)

Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

### Top 10 FAQ articles

1. [Computer is dead](#)

Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

2. [How to create a support bundle](#)

Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

2.139: FAQ

### Add FAQ Article

All fields marked with an asterisk (\*) are mandatory.

\* Title:

Keywords:

\* Category:

State:

Validity:

Language:

Attachment:   
Click to select files or just drop them here.

Symptom:  
(public)

**B I U S** |     |     |     |   

Format | Font | Size | **A**    | Source    

Problem:  
(public)

**B I U S** |     |     |     |   

Format | Font | Size | **A**    | Source    

Solution:  
(public)

**B I U S** |     |     |     |   

Format | Font | Size | **A**    | Source    

FAQs are organized into categories and sub-categories. You can create, edit, and delete FAQs.

### 2.6.3 FAQs

FAQs are organized into categories and sub-categories. You can create, edit, and delete FAQs.

**FAQ Journal:**

1-3 of 3 S

| FAQ#  | TITLE                          | CATEGORY | ACTION  | TIME                                |
|-------|--------------------------------|----------|---------|-------------------------------------|
| 49002 | How to create a support bundle | Misc     | Updated | 11/18/2020 15:51:32 (Europe/Berlin) |
| 49002 | How to create a support bundle | Misc     | Created | 11/18/2020 15:43:26 (Europe/Berlin) |
| 49001 | Computer is dead               | Misc     | Created | 11/18/2020 15:30:56 (Europe/Berlin) |

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2.141: FAQs

FAQs are organized into categories and sub-categories.

1. FAQs
2. FAQs
3. FAQs

FAQs are organized into categories and sub-categories.

### 2.6.4 Languages

FAQs are organized into categories and sub-categories.

Use this screen to manage languages available in FAQ articles. A fresh OTOBO installation already contains some languages by default. The language management screen is available in the Language Management menu item of the FAQ menu.

FAQ Language Management

**Actions**

Add language

**List**

| NAME | DELETE |
|------|--------|
| de   |        |
| en   |        |

2.142: FAQ Languages

## FAQ

### 1. 1. 2. 3.

1. 1. 2. 3.
2. 1. 2. 3.
3. 1. 2. 3.

### Add Language

\* Name:

**Submit** or Cancel

2.143: 1. 2. 3.

### 1. 1. 2. 3.

1. 1. 2. 3.
2. 1. 2. 3.
3. 1. 2. 3.

### Edit Language

\* Name:

**Submit** or Cancel

2.144: 1. 2. 3.

### 1. 1. 2. 3.

1. 1. 2. 3.
2. 1. 2. 3.

### List

| NAME | DELETE |
|------|--------|
| de   |        |
| en   |        |

2.145: 1. 2. 3.

## FAQ

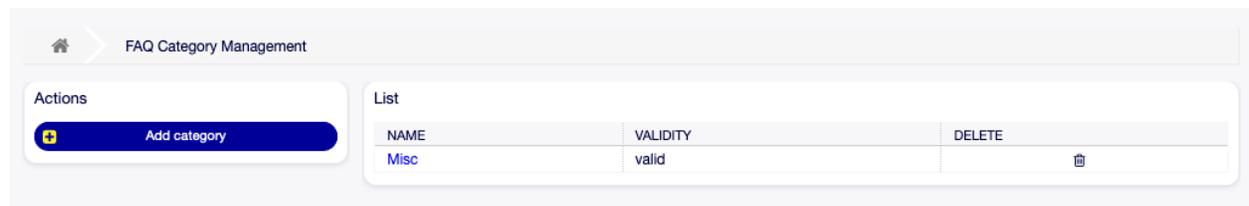
1. 1. 2. 3.

\* ISO 639-1

## 2.6.5

:

Use this screen to manage categories available in FAQ articles. A fresh OTOBO installation already contains a category by default. The category management screen is available in the Category Management menu item of the FAQ menu.



2.146: FAQ

## FAQ

- 1.
- 2.
- 3.

### Add Category

**\* Name:**

Subcategory of:

**\* Permission:**

Agent groups that can access articles in this category.

Validity:

**\* Comment:**

Will be shown as comment in Explorer.

or

2.147:

- 1.

2. 名称
3. 子类别 权限

**Edit Category**

**\* Name:**

Subcategory of:

**\* Permission:**

Agent groups that can access articles in this category.

Validity:

**\* Comment:**

Will be shown as comment in Explorer.

**Submit** or Cancel

图 2.148: 编辑类别

列表

1. 名称
2. 有效性 删除

| List |          |        |
|------|----------|--------|
| NAME | VALIDITY | DELETE |
| Misc | valid    |        |

图 2.149: 类别列表

FAQ

FAQ 常见问题解答

\* 名称

名称 名称

\* 名称

Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the resource.

\* 名称

2.6.6

FAQ FAQ FAQ



Search
✕

---

**Templates**

Search template:

Create New Delete

---

**Filters in use**

Fulltext:

---

**Additional filters**

Add another attribute:

Output:

Run search

2.151: ██████████

**Search Result:**

Change search options ⚙️
1-1 of 1 S

| ▲ FAQ# | TITLE                          | CATEGORY | LANGUAGE | STATE               | VALIDITY | CHANGED                          |
|--------|--------------------------------|----------|----------|---------------------|----------|----------------------------------|
| 49002  | How to create a support bundle | Misc     | en       | external (customer) | valid    | 11/18/2020 15:51 (Europe/Berlin) |

✓

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2.152: ██████████

2. 2.6.7

2.6.7

2.6.7

2.6.7

2.6.7 FAQ

2.6.7 FAQ

FAQ

FAQ This menu item opens the standard link screen of OTOBO. FAQ articles can be linked to other FAQ articles or tickets. Existing links can also be managed here.

FAQ

FAQ

**FAQ#: 49002 — How to create a support bundle**

FAQ > Misc > How to create a support bundle

Back | Edit | History | Print | Link | Delete

To open links in the following description blocks, you might need to press Ctrl or Cmd or Shift key while clicking the link (depending on your browser and OS). ✕

**Symptom** (public)

A support bundle needs to be created for the OTOBO system.

**Problem** (public)

The support package is designed to aid in diagnosing system health, setup and configuration, tells about usage statistics, and contains only the core files, delivered via packages or created by hand. All sensitive data is parsed is parsed out or left on the system. No customer or ticket data will be packaged. The package can be downloaded and viewed in its full.

**Solution** (public)

OTOBO 10:

1. Switch to *Admin -> Support Data Collector*
2. Click *"Generate Support Bundle"*
3. If the support bundle is needed for a ticket, please use the button *Download*.

**Comment** (internal)

See also <https://doc.otobo.org/manual/admin/stable/en/content/index.html>

**Rating**

How helpful was this article? Please give us your rating and help to improve the FAQ Database. Thank You!

not helpful ☆ 1 ☆ 2 ☆ 3 ☆ 4 ☆ 5 very helpful

**FAQ Information**

Category: Misc

Keywords: [support bundle generate](#)  
[OTOBO](#)

State: external (customer)

Validity: valid

Language: en

Rating: 0 out of 5

Votes: No votes found! Be the first one to rate this FAQ article.

Created: 11/18/2020 15:43  
(Europe/Berlin) (Super Admin)

Changed: 11/18/2020 15:51  
(Europe/Berlin) (Super Admin)

**Linked Objects**

Normal

OBJECT#

[T:2015071510123456](#)

2.153: FAQ

**Edit: FAQ: 49002**

All fields marked with an asterisk (\*) are mandatory.

[Cancel & close](#)

★ **Title:**

Keywords:

★ **Category:**

State:

Validity:

Language:

Attachment: 

  
 Click to select files or just drop them here.

Symptom: (public)

**B I U S** | | | | | | | | | | | | | | |

Format | Font | Size | **A** | **A** | *I* | Source | | | |

A support bundle needs to be created for the OTOBO system.

Problem: (public)

**B I U S** | | | | | | | | | | | | | | |

Format | Font | Size | **A** | **A** | *I* | Source | | | |

The support package is designed to aid in diagnosing system health, setup and configuration, tells about usage statistics, and contains only the core files, delivered via packages or created by hand. All sensitive data is parsed is parsed out or left on the system. No customer or ticket data will be packaged. The package can be downloaded and viewed in its full.

Solution: (public)

**B I U S** | | | | | | | | | | | | | | |

Format | Font | Size | **A** | **A** | *I* | Source | | | |

OTOBO 10:

1. Switch to Admin -> Support Data Collector
2. Click "Generate Support Bundle"
3. If the support bundle is needed for a ticket, please use the button *Download*.

History of FAQ#: 49002 - How to create a support bundle

[Close](#)

History Content

| ACTION  | USER             | CREATETIME                          |
|---------|------------------|-------------------------------------|
| Created | sa (Super Admin) | 11/18/2020 15:43:26 (Europe/Berlin) |
| Updated | sa (Super Admin) | 11/18/2020 15:51:32 (Europe/Berlin) |

2.155: FAQ

Manage links for FAQ# 49002: How to create a support bundle

[Close this dialog](#)

Create new links

Manage existing links

Link with:

FAQ#:

Title:

Fulltext:

[Start search](#)

2.156: FAQ

**Delete** ✕

Title: How to create a support bundle

Do you really want to delete this FAQ article?

[Yes](#) [No](#)

2.157: FAQ

### FAQ Information

Category: Misc

Keywords: [support bundle generate](#)  
[OTOBO](#)

State: external (customer)

Validity: valid

Language: en

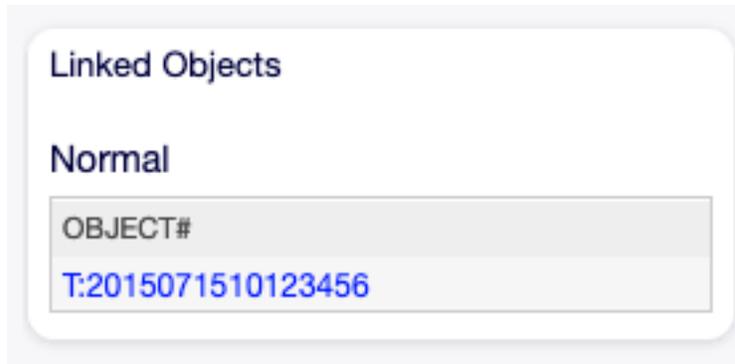
Rating: 0 out of 5

Votes: No votes found! Be the first one to rate this FAQ article.

Created: 11/18/2020 15:43  
(Europe/Berlin) (Super Admin)

Changed: 11/18/2020 15:51  
(Europe/Berlin) (Super Admin)

2.158: FAQ



2.159: Screenshot

FAQs are available in the following sections:

OTRS

:

LinkObject::ViewMode

▼ Linked: Ticket (1)

| TICKET#                          | TITLE             | STATE | QUEUE | CREATED                             | LINKED AS | DELETE |
|----------------------------------|-------------------|-------|-------|-------------------------------------|-----------|--------|
| <a href="#">2015071510123456</a> | Welcome to OTOBO! | new   | Raw   | 09/21/2020 17:08:29 (Europe/Berlin) | Normal    |        |

2.160: Screenshot

## 2.7

: This feature will be included in one of the next OTOBO releases. If you need it beforehand, please contact [sales@otobo.de](mailto:sales@otobo.de), we will find a solution.

:

ChatEngine::Active

OTRS PDF

### 2.7.1

📌: Rother OSS TODO: This feature will be included in one of the next OTOBO releases. If you need it beforehand, please contact [sales@otobo.de](mailto:sales@otobo.de), we will find a solution.

📌:

📌 ChatEngine::Active 📌

📌  
 📌  
 📌

### Manage Chats

**Hints**

Please note: This tab will be used by any request which is related to chats. If you leave the chat manager (e.g. by using the navigation bar on top of the page), starting a new chat or other chat-related actions will possibly reload this tab any time. This means that it is recommended to leave the chat manager opened in this particular tab.

**General Chat Requests From Customers**

My Chat Channels
All Chat Channels

| CREATED                               | TYPE | CHANNEL | REQUESTER | DESCRIPTION | ACTION |
|---------------------------------------|------|---------|-----------|-------------|--------|
| There are currently no chat requests. |      |         |           |             |        |

**General Chat Requests From Public Users**

| CREATED                               | TYPE | CHANNEL | REQUESTER | DESCRIPTION | ACTION |
|---------------------------------------|------|---------|-----------|-------------|--------|
| There are currently no chat requests. |      |         |           |             |        |

**Personal Chat Requests For You**

| CREATED                               | TYPE | CHANNEL | REQUESTER | DESCRIPTION | ACTION |
|---------------------------------------|------|---------|-----------|-------------|--------|
| There are currently no chat requests. |      |         |           |             |        |

**My Active Chats**

**Chat Integration**

You can easily integrate the chat into a web page. Just set up a few parameters and copy the integration code to your clip board.

</>
Configure Chat Integration

### 📌 2.161: 📌

📌

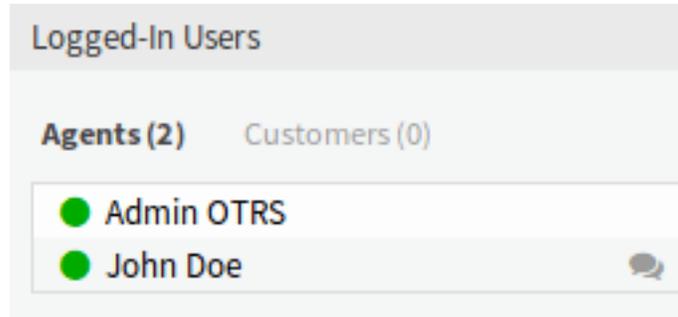
📌

📌

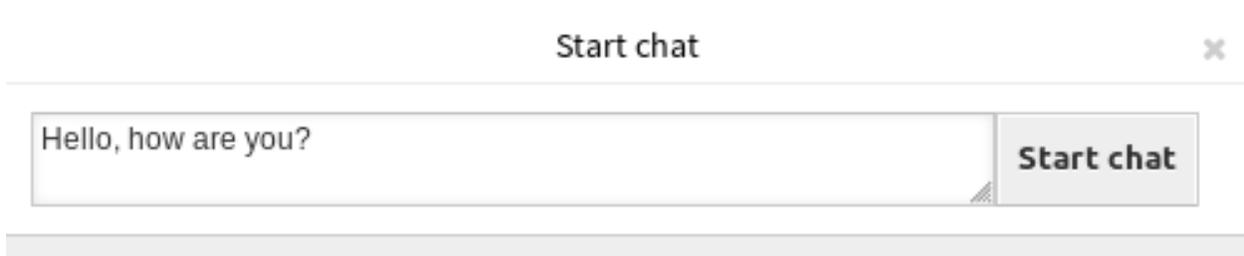
📌

📌

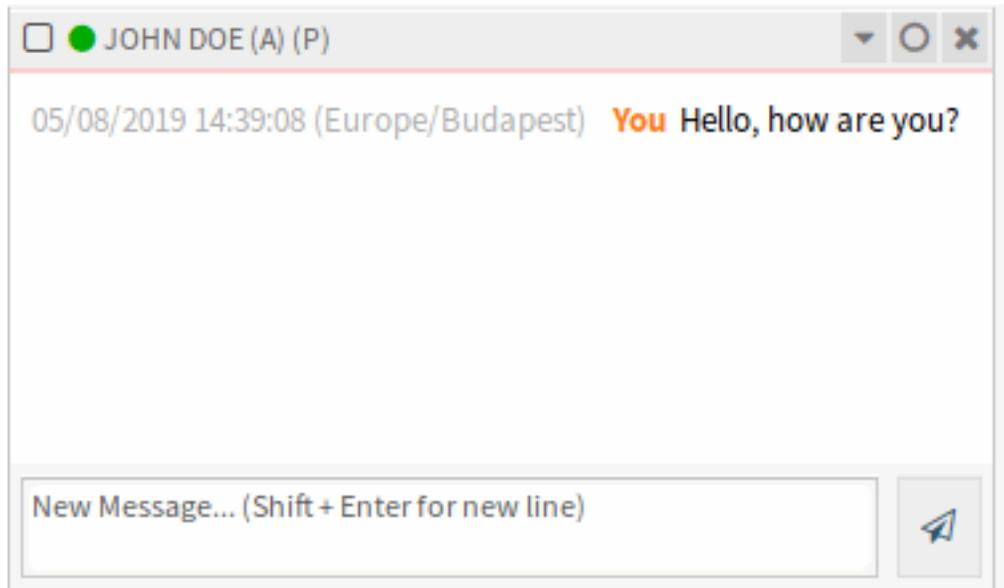
1. 📌
2. 📌
3. 📌
4. 📌
5. 📌
6. 📌



2.162: Logged-In Users



2.163: Start chat dialog

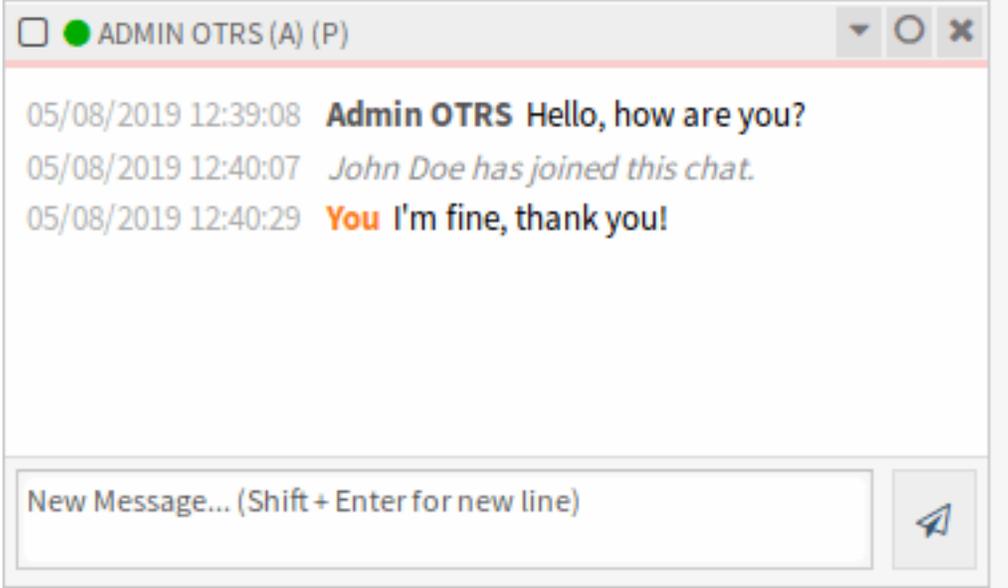


2.164: Chat window

Personal Chat Requests For You

| CREATED             | TYPE | CHANNEL         | REQUESTER  | DESCRIPTION         | ACTION    |
|---------------------|------|-----------------|------------|---------------------|-----------|
| 05/08/2019 12:21:22 | User | Default channel | Admin OTRS | Hello, how are you? | Open chat |

2.165: Personal Chat Requests For You



2.166: Chat window screenshot

Chat window

Chat window

1. Chat window

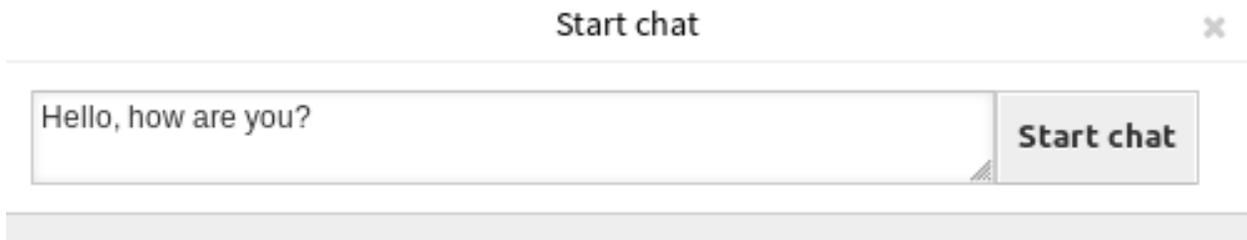


2.167: Logged-In Users panel

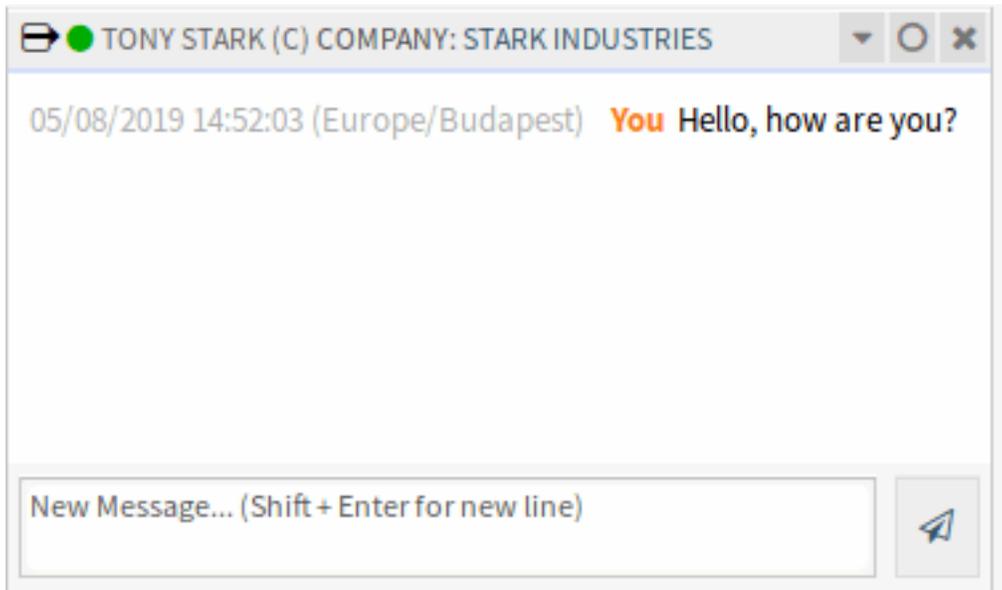
Chat:

Chat window

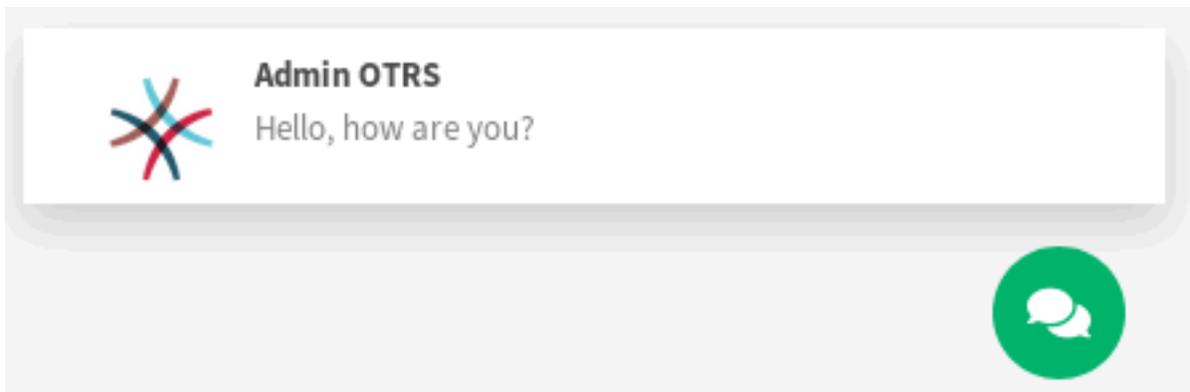
2. Chat window
3. Chat window
4. Chat window
5. Chat window
6. Chat window
7. Chat window



2.168: Start chat dialog



2.169: Chat window



2.170: Chat bubble

**< Admin OTRS** **X**  
05/08/2019 12:59:49 (UTC)

 Hello, how are you?  
05/08/2019 12:59:49 (UTC)

Tony Stark has joined this chat.  
05/08/2019 12:59:59 (UTC)

**I'm fine, thank you!**  
05/08/2019 13:00:13 (UTC)

Write a message. 

2.171: ████████████████████



<

**Send me a summary of this conversation.**

tony@stark-industries.com

Send

---

**Or, create a new ticket with the summary.**

Create Ticket



General Chat Requests From Customers

| My Chat Channels                      |          | All Chat Channels |            |                   |           |  |
|---------------------------------------|----------|-------------------|------------|-------------------|-----------|--|
| CREATED                               | TYPE     | CHANNEL           | REQUESTER  | DESCRIPTION       | ACTION    |  |
| 05/08/2019 15:47:09 (Europe/Budapest) | Customer | Helpdesk          | Tony Stark | I need some help! | Open chat |  |

2.174: [REDACTED]

Chat preview



Chat protocol

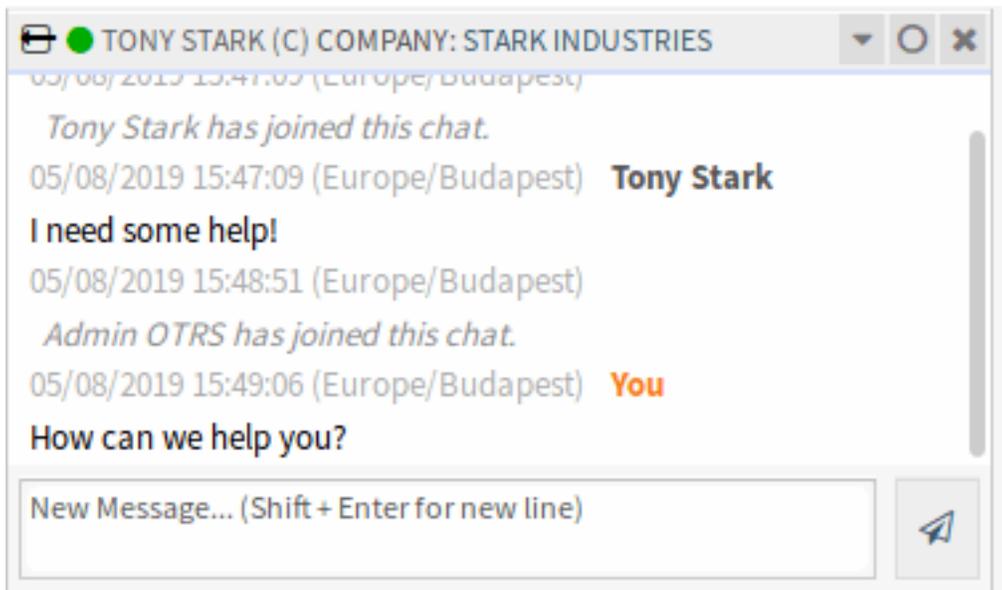
[05/08/2019 15:47:09 (Europe/Budapest)] Tony Stark has joined this chat.  
 [05/08/2019 15:47:09 (Europe/Budapest)] Tony Stark I need some help!

Change chat channel

Current chat channel: Helpdesk

Available channels:

2.175: [REDACTED]



2.176: [REDACTED]

< Chat Conversation X

Jane Smith has joined this chat.

05/08/2019 14:00:27 (UTC)

Can you tell me some details about the service?

05/08/2019 14:00:27 (UTC)

Please bear with us until one of our agents is able to handle your chat request. Thank you for your patience.

Write a message. [send icon]

2.177: [redacted]

General Chat Requests From Public Users

| CREATED                                  | TYPE   | CHANNEL  | REQUESTER  | DESCRIPTION                                     | ACTION    |
|--|--------|----------|------------|---|-----------|
| 05/08/2019 16:00:27<br>(Europe/Budapest) | Public | Helpdesk | Jane Smith | Can you tell me some details about the service? | Open chat |

2.178: [redacted]

Chat widget

The chat widget is the main component when chatting with other people. It provides a history of all messages in the chat as well as a list of possible actions depending on your permission level.

Pressing Shift + Enter will create a new line in the chat.

The chat widget supports the following actions:

- Send messages (text)
- Send messages (text ChatEngine::AgentOnlineThreshold)
- Send messages (text)
- Send messages (text)
- Send messages (text)

The chat widget supports the following actions:

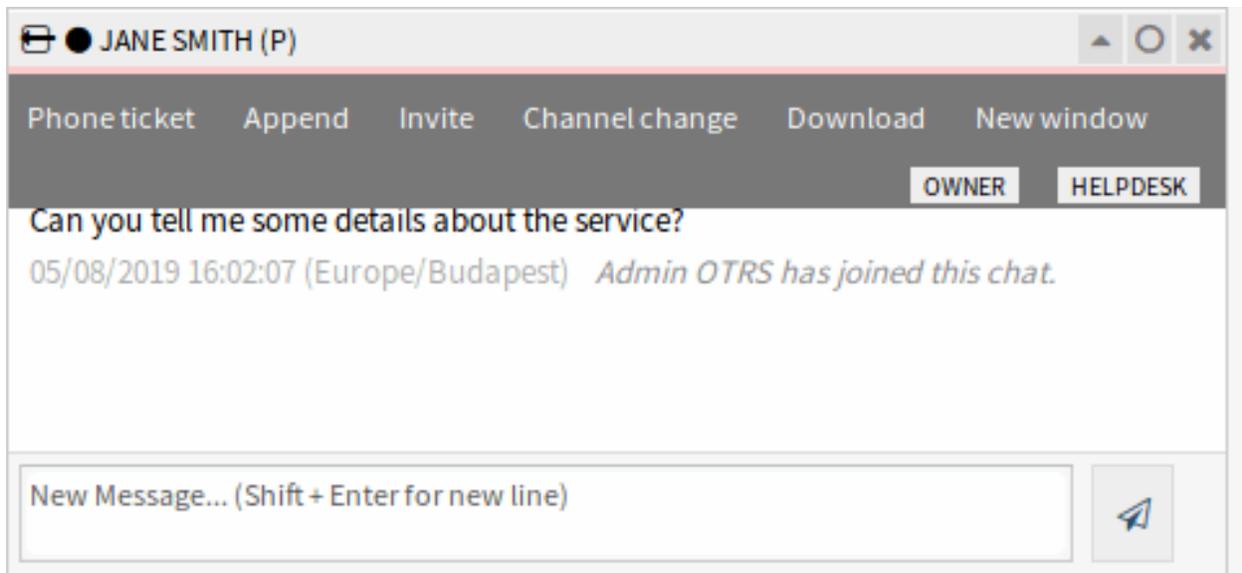


Figure 2.179: Chat widget

The chat widget supports the following actions:

The chat widget supports the following actions:

The chat widget supports the following actions:

Allows you to invite another agent to this chat. You can select from a list of available agents whom you want to invite. Once the agent has invited, a new agent to agent chat request will be sent to this agent. After the request has been accepted, a new internal chat will be established between you and the invited agent. In this internal chat, the invited agent has two more actions available in the advanced actions toolbar: Observer and Participant.

The chat widget supports the following actions:



Chat Integration ✕

You can easily integrate the public chat into a website. Just copy the code snippets from here. If you would like to make any adaptations, please switch to the configuration tab. All changes are applied immediately to the snippet, so you can make your changes and copy the snippet to your clip board afterwards. Please note that changes made on this page are not remembered.

Configuration Integration Code Preview

**Integration Code**

Integrate this into the bottom of your page:

```
<script type="text/javascript" src="http://yourhost.example.com/dist/chatintegration/main.js"></script>
```

Close this dialog

2.181: 11.0 - 11.0

Chat Integration ✕



It looks like no one is available at the moment. Please try again later.

⋮

Close this dialog

2.182: 11.0 - 11.0

Figure 2.8: Report Management Screenshot

If mixed content warning is displayed in the browser console, an administrator has to check that the system configuration setting `HttpType` is properly set. The website must run on the same protocol for the chat widget to work.

For example, if the website is running OTOBO on SSL, the system configuration option must be set to `https`.

## 2.8 Reports

Figure 2.8: Report Management Screenshot

### 2.8.1 Report Management

Use this screen to manage reports. A fresh OTOBO installation contains no reports by default. The reports management screen is available in the Reports menu item of the Reports menu.

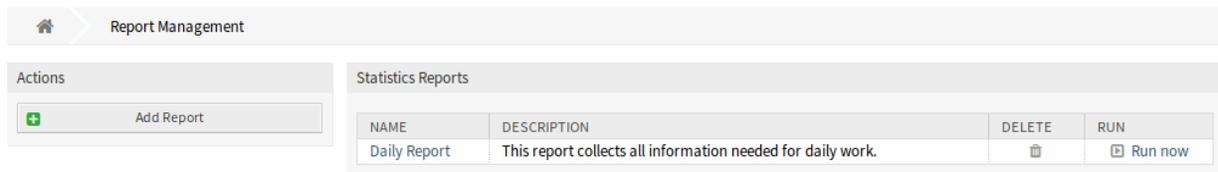


Figure 2.183: Report Management Screenshot

Figure 2.8.1

Figure 2.8.1

1. Add Report
2. Edit Report
3. Delete Report
4. Run Report

Figure 2.8.1

1. Add Report
2. Edit Report
3. Delete Report

Figure 2.8.1

1. Add Report
2. Edit Report

Figure 2.8.1



## Settings

**General settings**★ Name: ★ Description: ★ Valid: **Automatic generation settings**Automatic generation times (cron): 

Specify when the report should be automatically generated in cron format, e. g. "10 1 \* \* \*" for every day at 1:10 am.

Times are in the system timezone.

Automatic generation language: 

The language to be used when the report is automatically generated.

Email subject: 

Specify the subject for the automatically generated email.

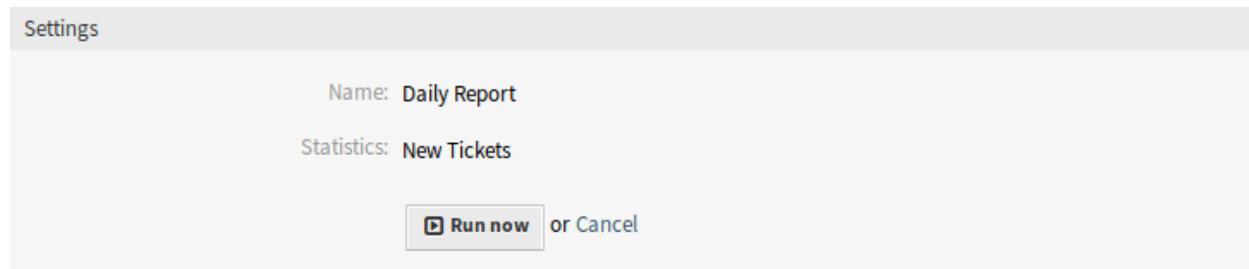
Email body: 

Specify the text for the automatically generated email.

Email recipients: 

Specify recipient email addresses (comma separated).

**Output settings**Headline: Title: Caption for preamble: Preamble: Caption for epilogue: Epilogue: Add statistic to report:



2.186: Settings

Settings

Name: Daily Report

Statistics: New Tickets

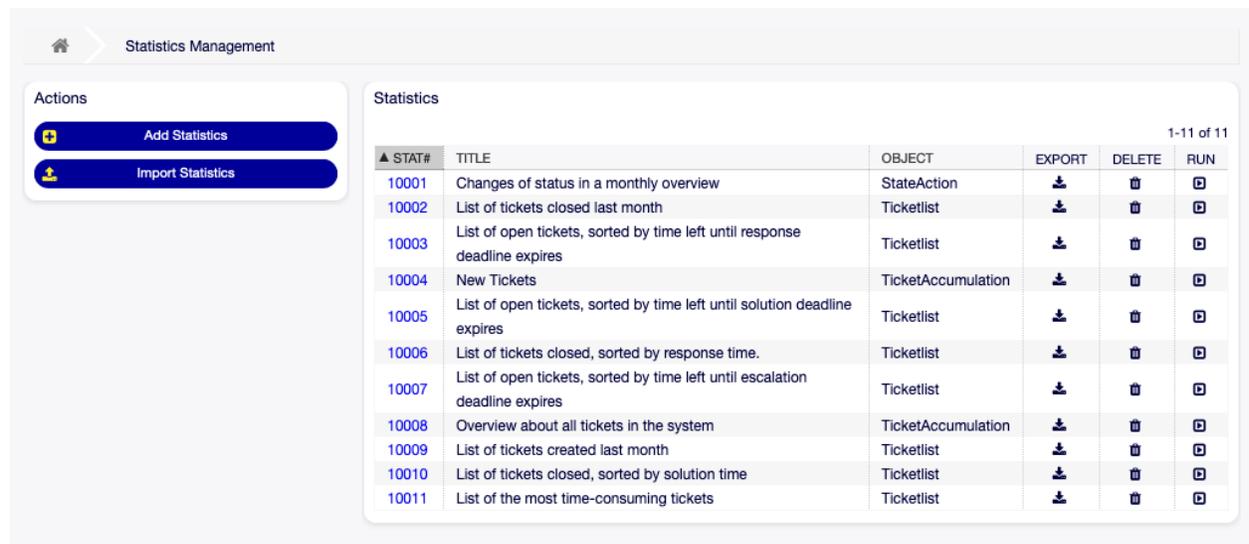
Run now or Cancel

Settings

Settings

### 2.8.2 Statistics

Use this screen to manage statistics. A fresh OTOBO installation already contains some statistics by default. The statistics management screen is available in the Statistics menu item of the Reports menu.



2.187: Statistics Management

Statistics

Three type of statistics are available in OTOBO.

Statistics

**Add Statistics**



**Dynamic Matrix**  
Each cell contains a singular dat...



**Dynamic List**  
Each row contains data of one e...



**Static**  
Non-configurable complex statis...

2.188: 2.188

2.188 2.188

2.188 2.188

To create new statistics:

1. 2.188 2.188
2. 2.188 2.188
3. 2.188 2.188
4. 2.188 2.188

**General Specification**

**\* Title:**

**\* Description:**

**\* Object type:**

**\* Permissions:**   
You can select one or more groups to define access for different agents.

**\* Result formats:**

**\* Time Zone:**   
The selected time periods in the statistic are time zone neutral.

**Create summation row:**   
Generate an additional row containing sums for all data rows.

**Create summation column:**   
Generate an additional column containing sums for all data columns.

**Validity:**   
If set to invalid end users can not generate the stat.

2.189: 2.189

To edit statistics:

1. 2.188 2.188

2. 
3. 

**▼ General Specification**

**\* Title:**

**\* Description:**

**\* Permissions:**   
 You can select one or more groups to define access for different agents.

**\* Result formats:**

**\* Time Zone:**   
 The selected time periods in the statistic are time zone neutral.

**Create summation row:**   
 Generate an additional row containing sums for all data rows.

**Create summation column:**   
 Generate an additional column containing sums for all data columns.

**Cache results:**   
 Stores statistics result data in a cache to be used in subsequent views with the same configuration (requires at least one selected time field).

**Show as dashboard widget:**   
 Provide the statistic as a widget that agents can activate in their dashboard. Please note that enabling the dashboard widget will activate caching for this statistic in the dashboard.

**Validity:**   
 If set to invalid end users can not generate the stat.

2.190: 

To import statistics:

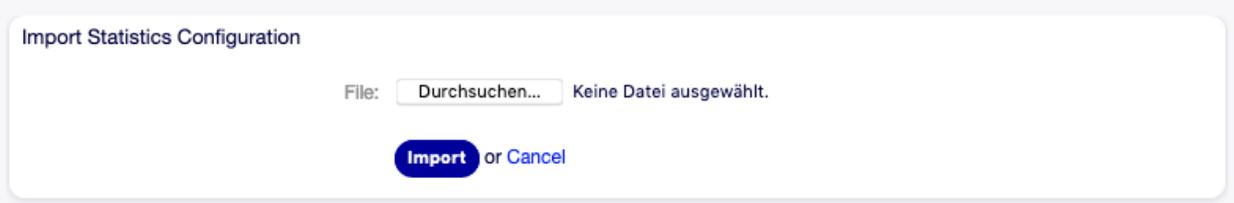
1. 
2.  .xml 
3. 
4. 
5. 

To export statistics:

1. Click on the download icon in the list of statistics.
2.  .xml 

To delete statistics:

1. 

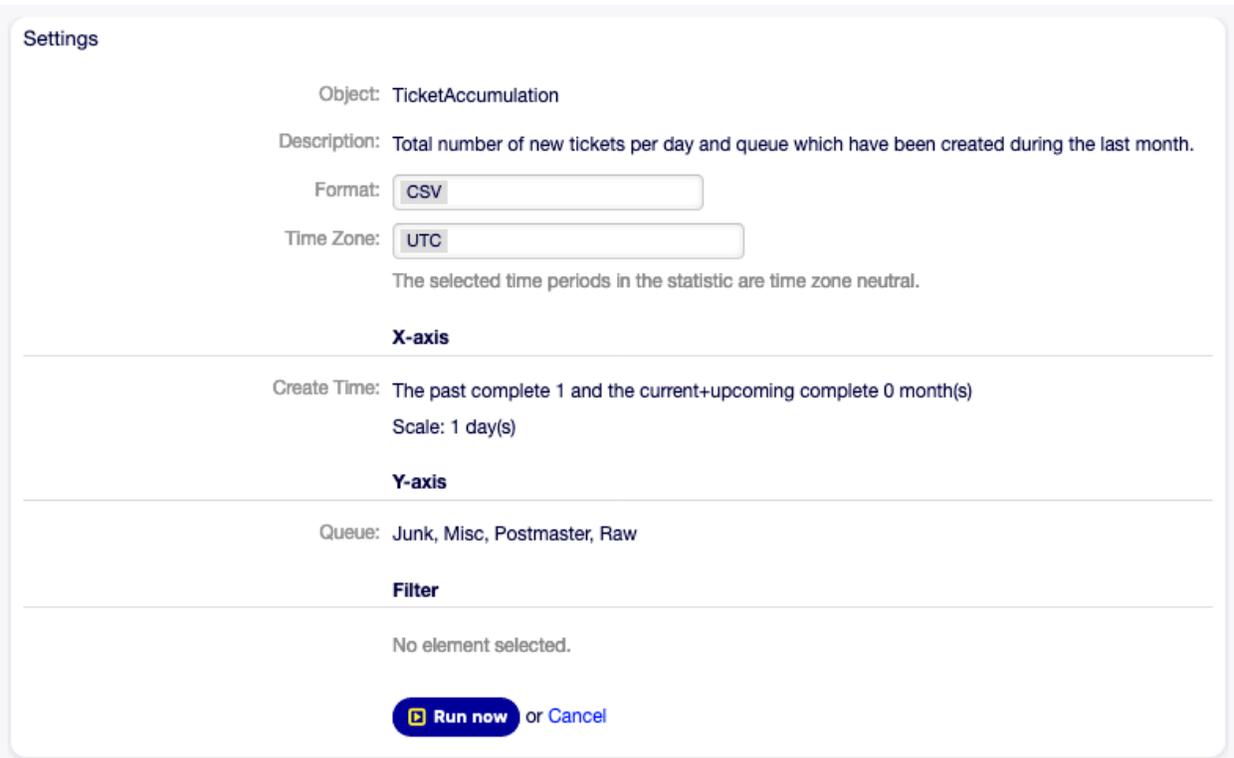


2.191: Import Statistics Configuration

2. Import Statistics Configuration

To run statistics:

1. Click on the play icon in the list of statistics.
2. Import Statistics Configuration
3. Run Statistics



2.192: Settings

To preview statistics:

1. Import Statistics Configuration
2. Run Statistics
3. Import Statistics Configuration
4. Import Statistics Configuration X-axis Y-axis Z-axis



2.193: 11.0

名称: 资源名称

属性

资源名称 必填

名称 \* 资源名称 必填

名称 资源名称 必填

名称 \* 资源名称 必填

名称 \* 资源名称 必填

名称 \* 资源名称 必填

名称 资源名称 必填

名称 资源名称 必填

名称 资源名称 必填

名称 资源名称 必填

名称: 资源名称

名称 \* Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid. Setting this field to invalid will disable the use of the resource.

属性

名称 资源名称 必填

名称 资源名称 必填

Ticket# 必填

名称 资源名称 必填

名称 ID 资源名称 必填

名称 资源名称 必填

SLA 名称SLA 名称SLA 必填

EscalationDestinationIn

EscalationDestinationDate

EscalationTimeWorkingTime

EscalationSolutionTime Unix

EscalationUpdateTime Unix

RealTillTimeNotUsed Unix

Unix

Unix

Unix

Unix

DynamicField\_NameX

## 2.9

This menu item opens the administrator interface, which is described very detailed in the [Administration Manual](#).

---

Unix

---

## 2.10

Search function can be used to search everything inside OTOBO. This function looks for the search term in tickets, articles and FAQ articles, as well as in attached documents.

### 2.10.1

Unix

Search
x

---

**Templates**

Search template:

[Create New](#)

---

**Filters in use**

Fulltext:

---

**Additional filters**

Add another attribute:

Output:

[Run search](#)

2.194: Unix



quick fox ^ quick^2 fox) (quick fox)  
 quick^2 fox

"quick fox"^2 (brown lazy)^4

quick brown fox

+ -

quick brown +fox -news

- fox
- news
- quick brown

AND OR NOT ` ` & | | ! ((quick AND fox) OR (brown AND fox) OR fox) AND NOT news

(quick OR brown) AND fox

+ - = && | | > < ! ( ) { } [ ] ^ " ~ \* ? : \ /

(1+1)=2  
 \ (1\+1)\ =2

:

Elasticsearch

## 2.11 Accessibility

OTOBO offers a high contrast skin for better accessibility. You can activate it in your .



In this section you can find information if you are working as a customer user in OTOBO.

### 3.1 Avatar actions

By hovering over the Avatar you can either `../avatar/logout` or change your `../avatar/personal-preferences`.

#### 3.1.1

Use this screen to set personal preferences in OTOBO. All settings changed on this site affect only your profile, and does not affect the behavior of OTOBO for other users.

Here you can change the skin of your OTOBO interface.



 3.1: Skin selection



**Time Zone**  
 Select your personal time zone. All times will be displayed relative to this time zone.

Time Zone  
 Europe/Berlin

Update

3.4: Time Zone selection

**Ticket overview**  
 Select after which period ticket overviews should refresh automatically.

Refresh interval  
 15 minutes

Update

3.5: Refresh interval

⚠: Refreshing the overview screens too often can cause performance issues on large systems with many users.

### Number of displayed tickets

Here you can select how many tickets should be shown by default.

**Number of displayed tickets**  
 Select how many tickets should be shown in overviews by default.

Tickets per page  
 25

Update

3.6: Number of displayed tickets

XXXXXXXXXXXXXXXXXX

### 3.1.2 Logout

Use the logout icon to leave OTOBO and go to the login screen.

⚠: Clicking on logout icon will logout the user without confirmation.



3.7:

## 3.2 Accessibility

OTOBO offers a high contrast skin for better accessibility. You can activate it in your [settings](#).

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Documentation History

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1. 2019 - OTRS User Manual - OTRS AG (<https://otrs.com>)
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