# OTRS User Manual

*Release 8.0*

**OTRS AG**

**Jan 20, 2021**

# Agent Interface

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# CHAPTER 1

# Login to Agent Interface

The agent interface is available at the following location.

```
https://<OTRS_HOST>/agent
```

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

You need an agent account to be able to use **OTRS**. If you do not have an account yet, please contact your administrator.

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

For security reasons, two-factor authentication has to be setup for each agent when they login for the first time. Click on the *Setup* button to setup this security feature.

The two-factor token will be sent to the email address of the agent, or the agent can use an authenticator application.

## 1.1 Email Authentication

Selecting the *Enable email security* option activates opportunistic encryption of the email containing the two-factor token when sent. This feature will work only if either a PGP or S/MIME subsystem is activated and if there is a public key or certificate available for the agent’s target email address. Otherwise the email will be sent in plain text.

Check your mailbox and find the email containing the two-factor token. The token consists of numbers. Type the token into the next window.

This setup can be changed in the *Security* section of the *Personalization* menu after the successful login.

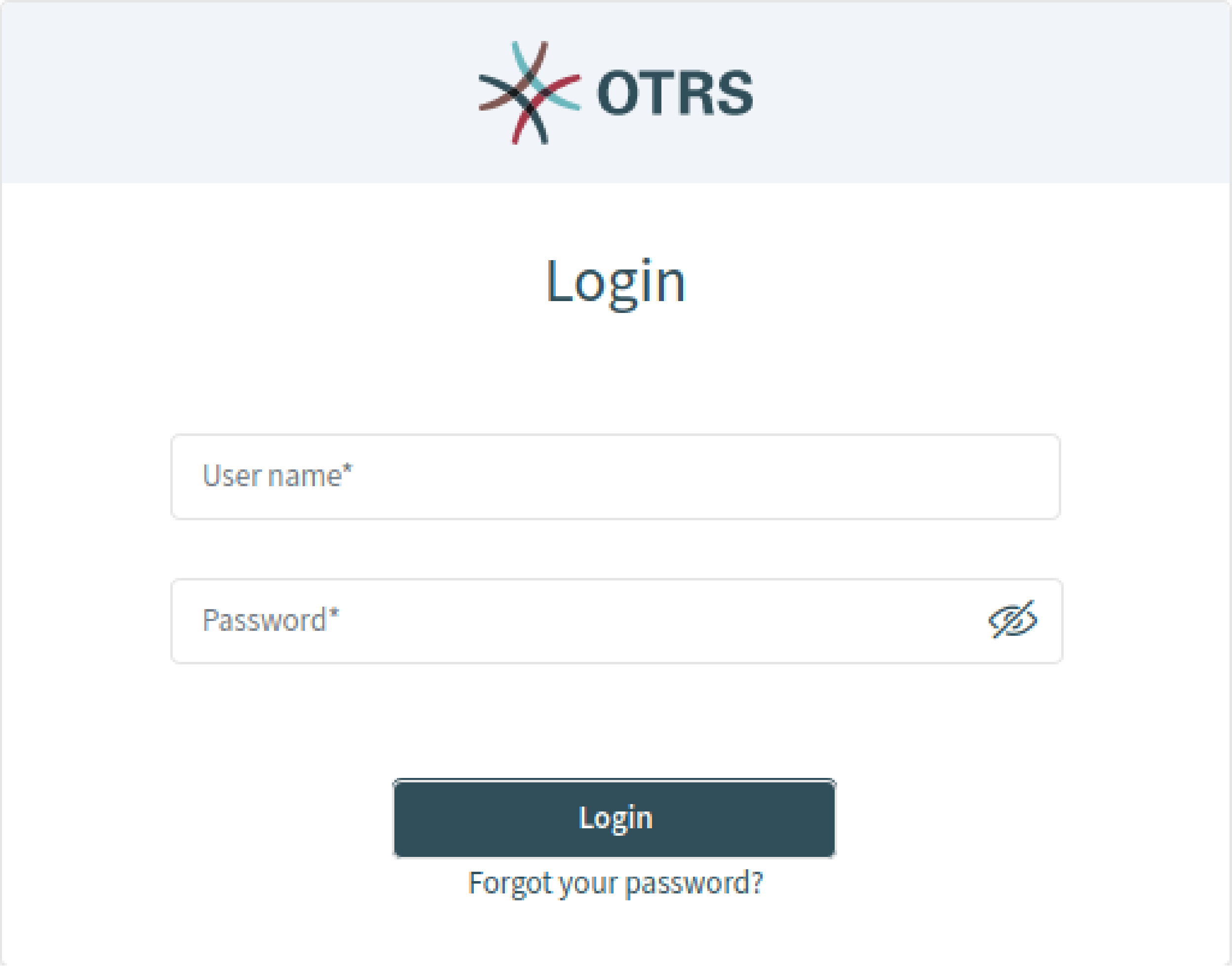
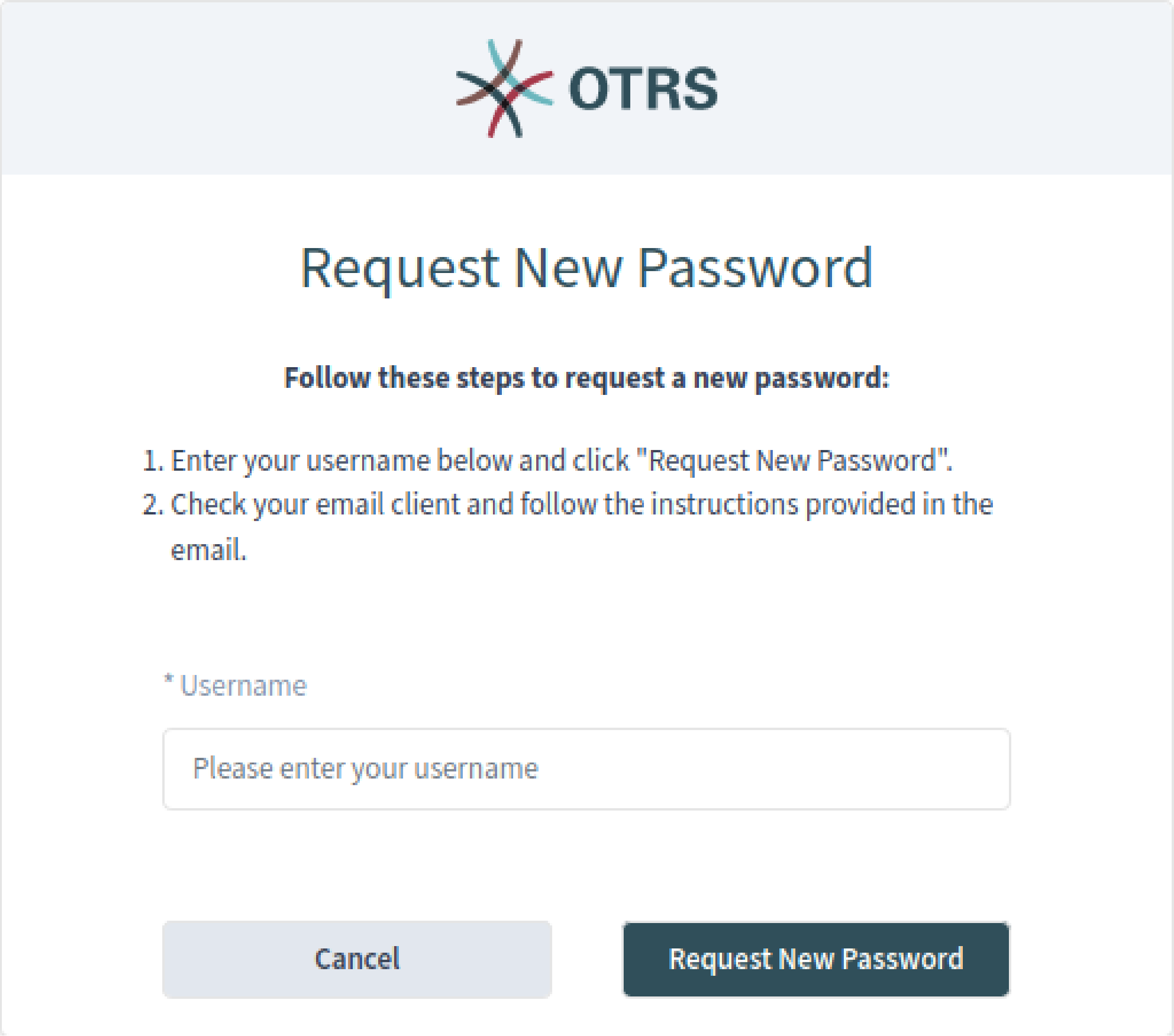

OTRS
Login
User name*
Password*
Login
Forgot your password?

Fig. 1: Agent Login Screen



## Request New Password

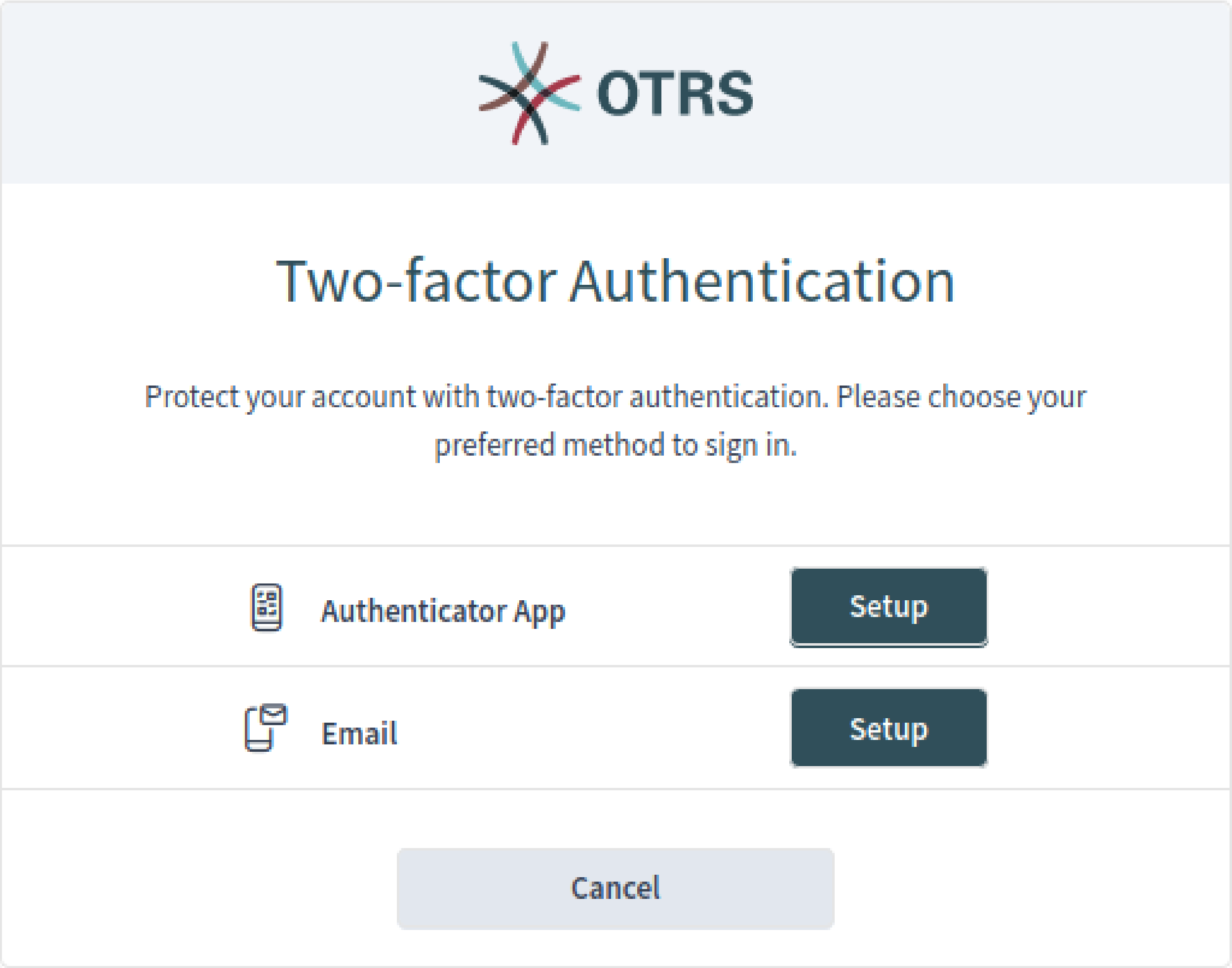
**Follow these steps to request a new password:**

1. Enter your username below and click "Request New Password".
2. Check your email client and follow the instructions provided in the email.

* Username

Please enter your username

Fig. 2: Request New Password Screen

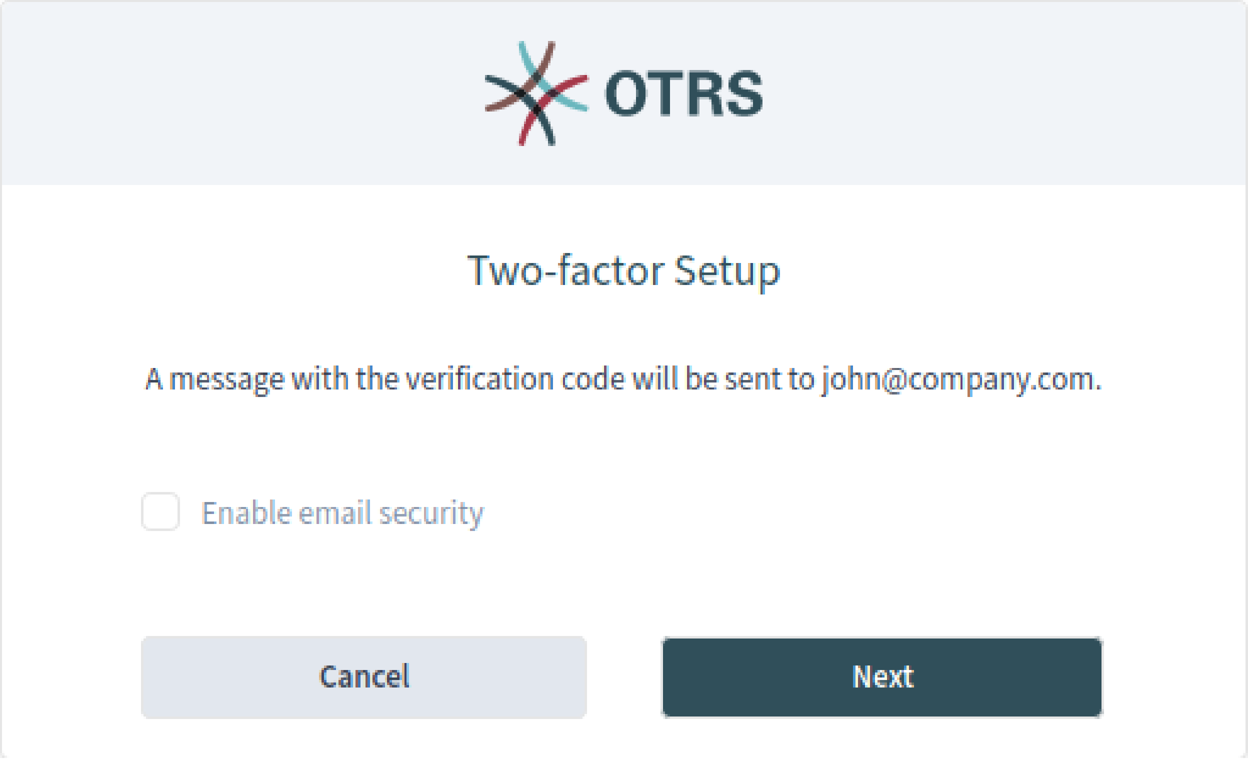


Two-factor Authentication

Protect your account with two-factor authentication. Please choose your preferred method to sign in.

OTRS
Authenticator App
Setup
Email
Setup
Cancel

Fig. 3: Two-factor Authentication



Two-factor Setup

A message with the verification code will be sent to john@company.com.

☐ Enable email security

Fig. 4: Two-factor Setup for Email

## 1.2 Authenticator App

The agent can use an authenticator application for two-factor authentication. All information is displayed in the setup page.

The successful setup needs an initial verification.

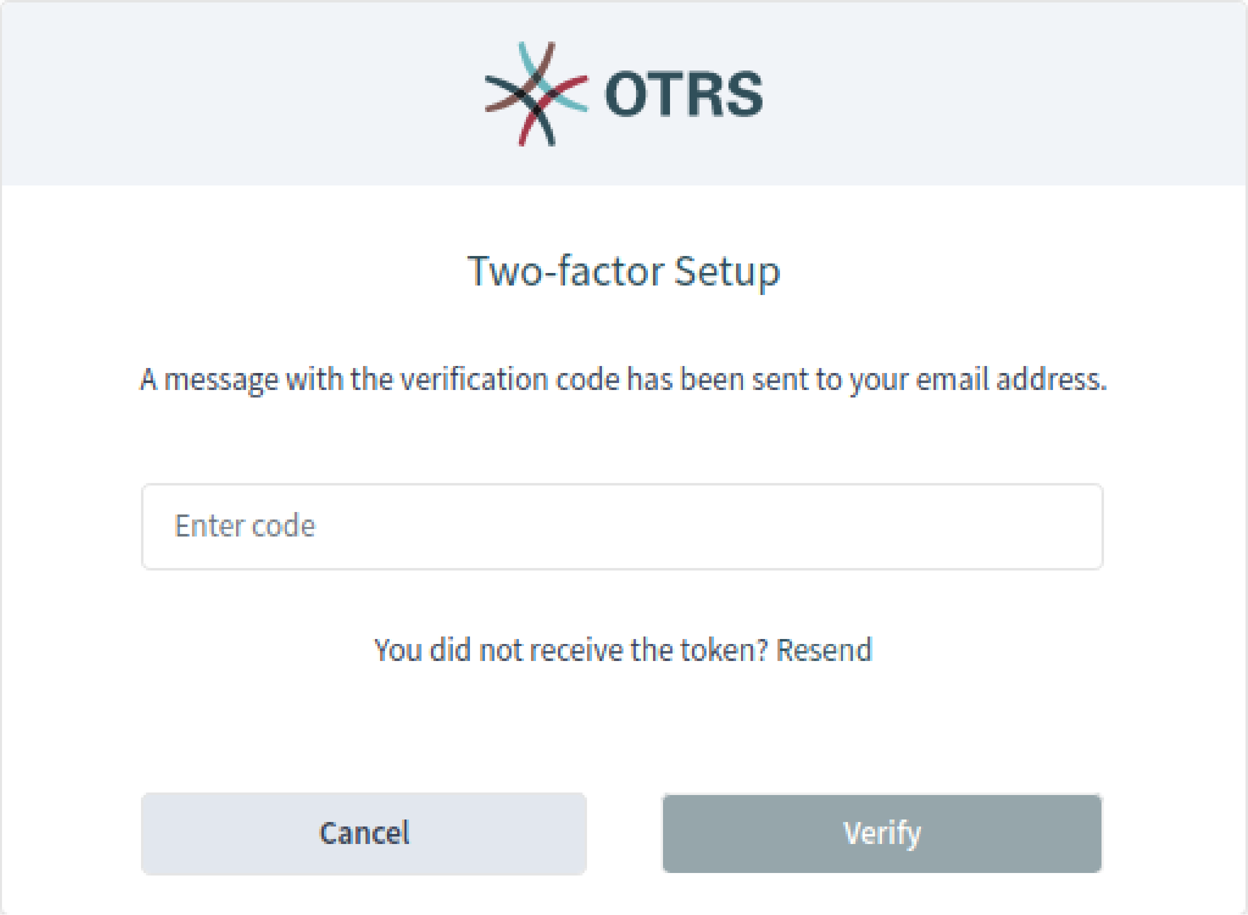
This setup can be changed in the *Security* section of the *Personalization* menu after the successful login.

## 1.3 First Login

Depending on the system configuration, the agent may have to change the initial password at first login.

After a successful login, the agent dashboard will be displayed.

Congratulations! You are now able to use the **OTRS** system.



OTRS

Two-factor Setup

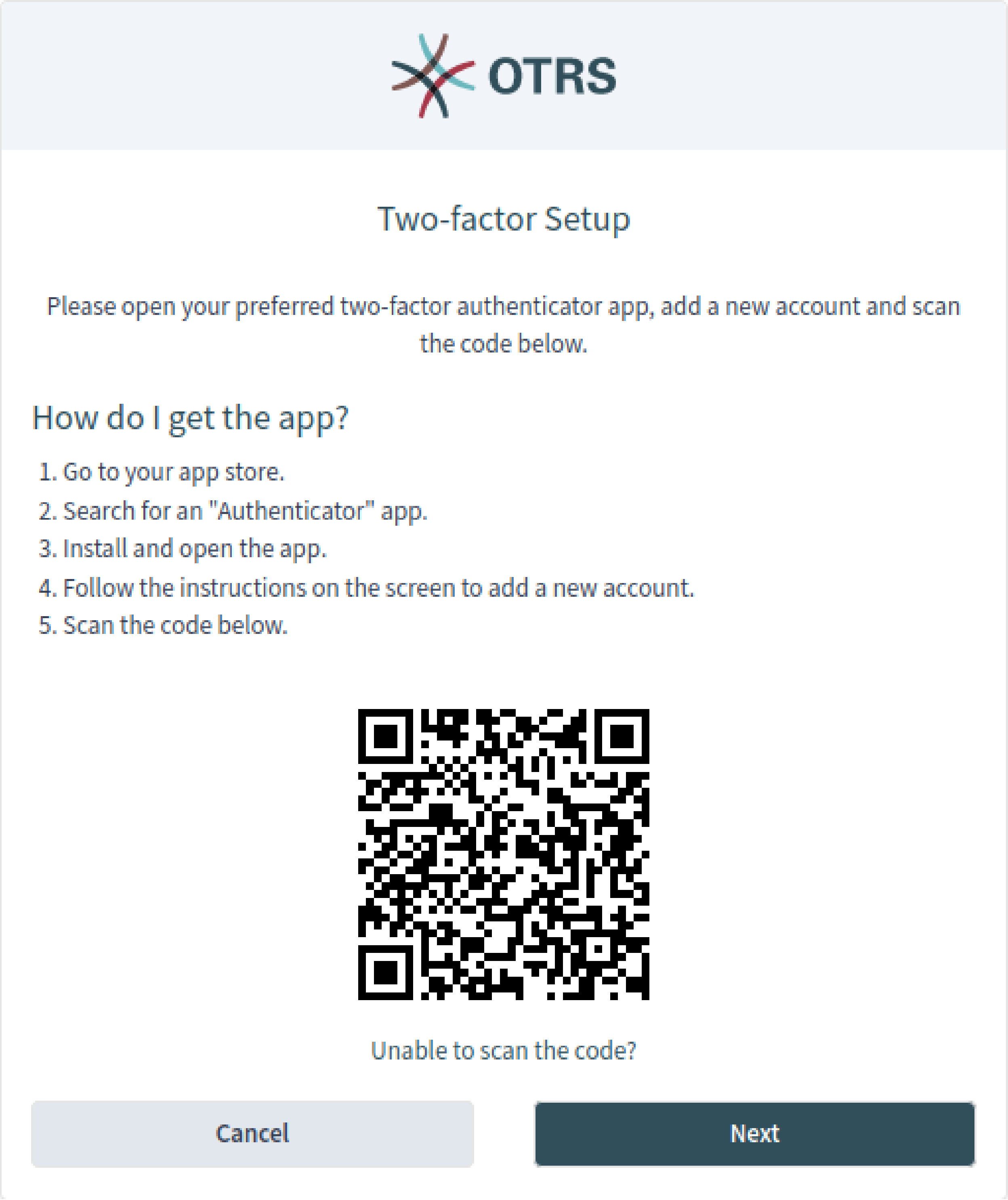
A message with the verification code has been sent to your email address.

Enter code

You did not receive the token? Resend

Cancel
Verify

Fig. 5: Two-factor Setup Email Verification



Two-factor Setup

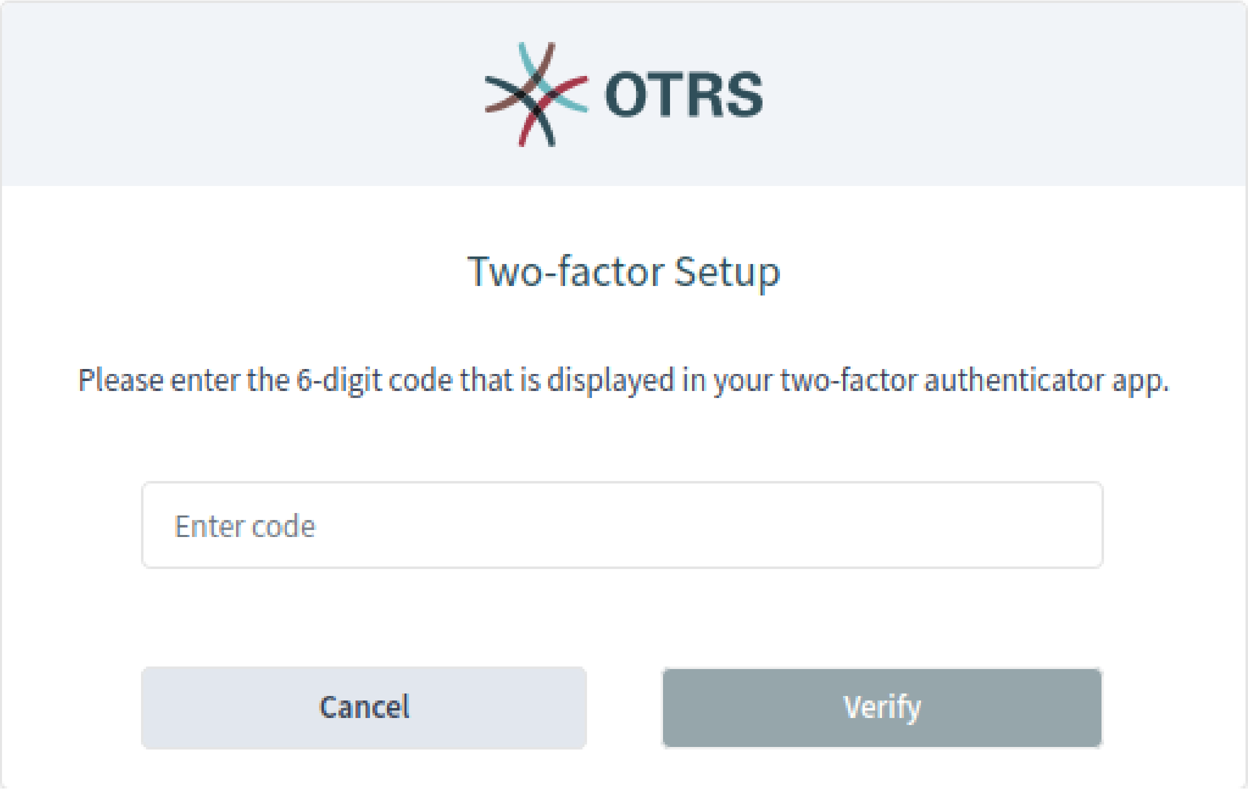
Please open your preferred two-factor authenticator app, add a new account and scan the code below.

How do I get the app?

1. Go to your app store.
2. Search for an "Authenticator" app.
3. Install and open the app.
4. Follow the instructions on the screen to add a new account.
5. Scan the code below.

Unable to scan the code?

Fig. 6: Two-factor Setup for Authenticator App



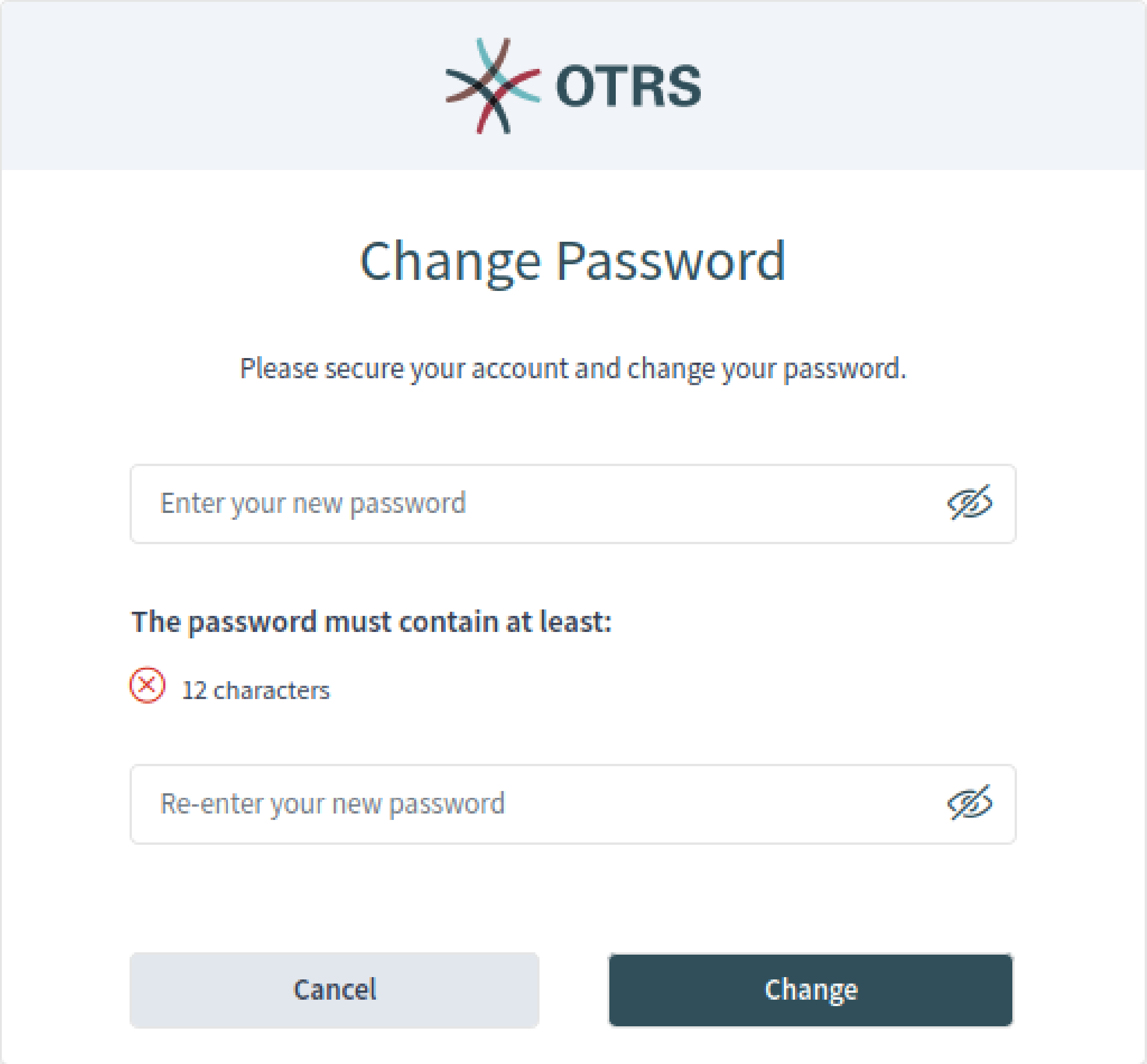
OTRS

Two-factor Setup

Please enter the 6-digit code that is displayed in your two-factor authenticator app.

Enter code
Cancel
Verify

Fig. 7: Two-factor Setup Authenticator App Verification



## Change Password

Please secure your account and change your password.

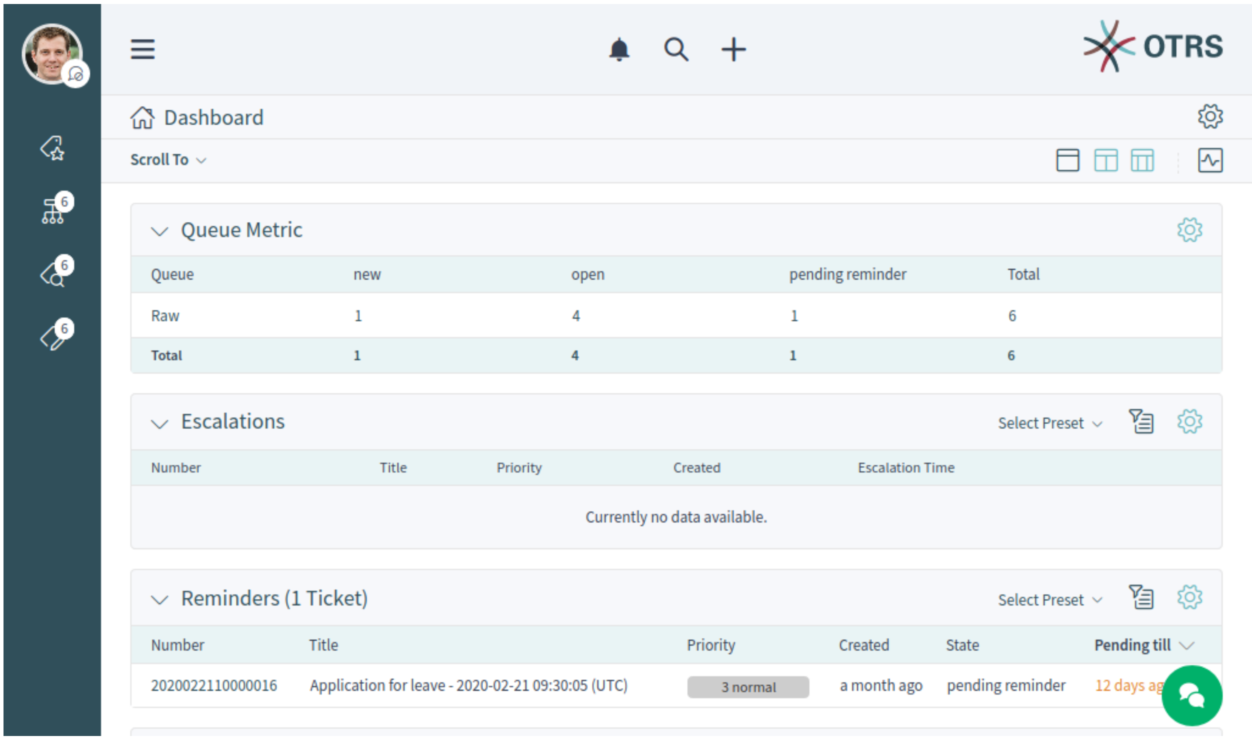
Enter your new password

**The password must contain at least:**

☒ 12 characters

Re-enter your new password

Fig. 8: Change Initial Password


OTRS
6
6
6
Dashboard
Scroll To
Select Preset
Select Preset

Queue Metric

| Queue | new | open | pending reminder | Total |
|---|---|---|---|---|
| Raw | 1 | 4 | 1 | 6 |
| **Total** | **1** | **4** | **1** | **6** |

Escalations

| Number | Title | Priority | Created | Escalation Time |
|---|---|---|---|---|

Currently no data available.

Reminders (1 Ticket)

| Number | Title | Priority | Created | State | Pending till |
|---|---|---|---|---|---|
| 2020022110000016 | Application for leave - 2020-02-21 09:30:05 (UTC) | 3 normal | a month ago | pending reminder | 12 days ag |

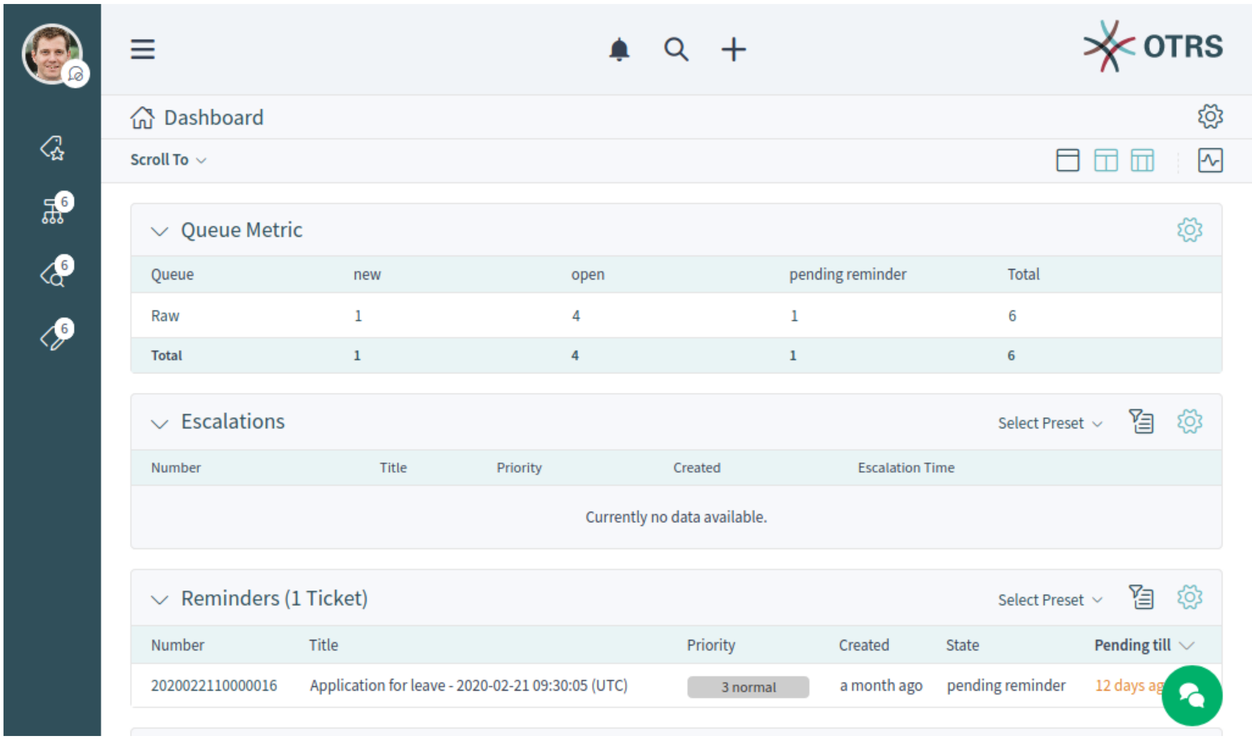
Fig. 9: Personal Dashboard

## CHAPTER 2

# Navigation And Usage

**OTRS** has a modular structure. All of its objects, lists, widgets and overviews are configurable components, but the configuration should be done in the same manner. This chapter explains the general usage of the OTRS agent interface.

The agent interface acts as a dashboard for the agents. This is a complex screen where most of the actions are accessible.



Queue Metric

| Queue | new | open | pending reminder | Total |
|---|---|---|---|---|
| Raw | 1 | 4 | 1 | 6 |
| **Total** | **1** | **4** | **1** | **6** |

Escalations

| Number | Title | Priority | Created | Escalation Time |
|---|---|---|---|---|

Currently no data available.

Reminders (1 Ticket)

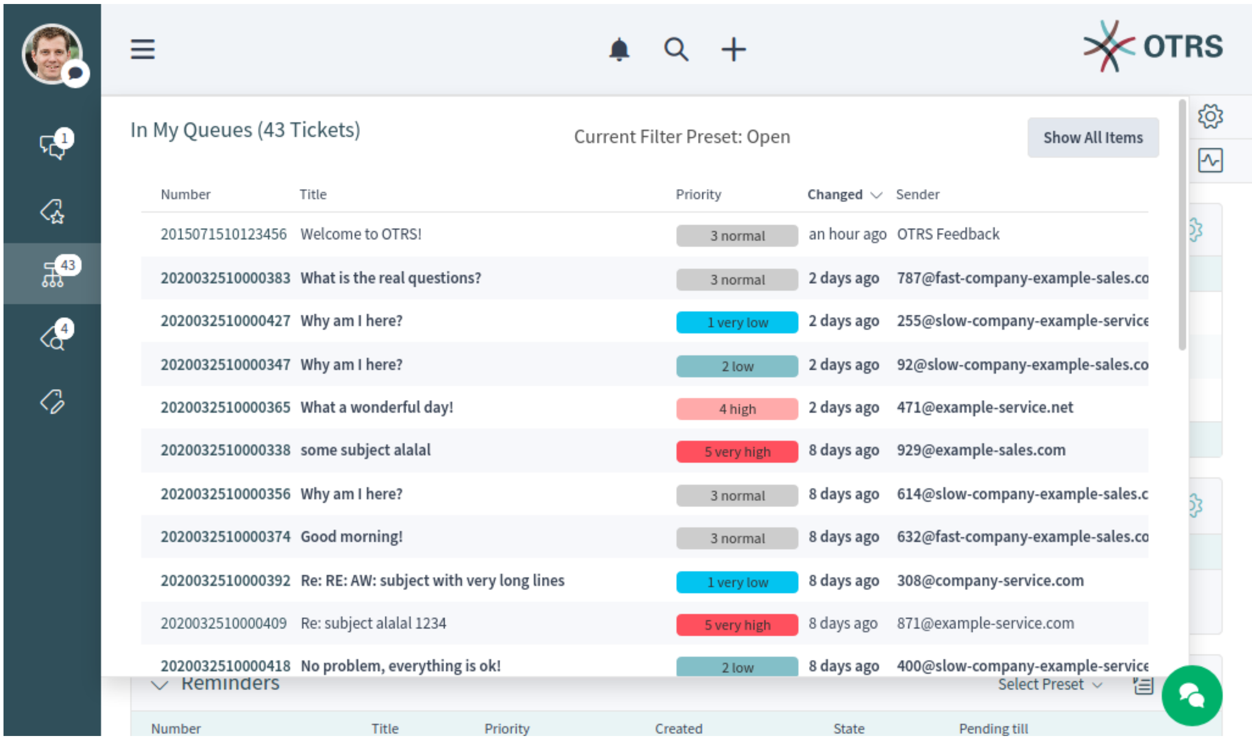
| Number | Title | Priority | Created | State | Pending till |
|---|---|---|---|---|---|
| 2020022110000016 | Application for leave - 2020-02-21 09:30:05 (UTC) | 3 normal | a month ago | pending reminder | 12 days ag |

Fig. 1: Personal Dashboard

## 2.1 Navigation Elements

On the left side of the screen, there is a sidebar called the *organizer*. The organizer sidebar contains the personal settings of the current agent and shortcuts to business object lists. The items of the organizer sidebar can be customized in the *Personalization* menu. This organizer sidebar is hidden by default when using **OTRS** with a mobile device.

Hovering the mouse over a business object list icon in the organizer sidebar opens a preview of the according business object list.



| Number | Title | Priority | Changed | Sender |
|---|---|---|---|---|
| 2015071510123456 | Welcome to OTRS! | 3 normal | an hour ago | OTRS Feedback |
| 2020032510000383 | What is the real questions? | 3 normal | 2 days ago | 787@fast-company-example-sales.co |
| 2020032510000427 | Why am I here? | 1 very low | 2 days ago | 255@slow-company-example-service |
| 2020032510000347 | Why am I here? | 2 low | 2 days ago | 92@slow-company-example-sales.co |
| 2020032510000365 | What a wonderful day! | 4 high | 2 days ago | 471@example-service.net |
| 2020032510000338 | some subject alalal | 5 very high | 8 days ago | 929@example-sales.com |
| 2020032510000356 | Why am I here? | 3 normal | 8 days ago | 614@slow-company-example-sales.c |
| 2020032510000374 | Good morning! | 3 normal | 8 days ago | 632@fast-company-example-sales.co |
| 2020032510000392 | Re: RE: AW: subject with very long lines | 1 very low | 8 days ago | 308@company-service.com |
| 2020032510000409 | Re: subject alalal 1234 | 5 very high | 8 days ago | 871@example-service.com |
| 2020032510000418 | No problem, everything is ok! | 2 low | 8 days ago | 400@slow-company-example-service |

Fig. 2: Business Object List Preview

At the top of screen is the header bar that has the most important menus. This part of the screen is visible on every page.

The main menu, accessed by the three horizontally stacked lines on the left side of the header bar, contains links to the most important screens within the system.

In the center of the header bar, the notification menu, the search field and the action menu can be found.

***Notifications*** Clicking on the bell icon will show the currently unread notifications. There is a *Show All* button that opens the notification list from which you can select any previous notification.

***Search*** Clicking on the magnification glass icon will display a search bar, allowing you to search for everything in the system.

**Action menu** Clicking on the plus icon will open a menu to create new business objects.

Below the header bar, the breadcrumb bar is located. This helps to easily identify where the agent currently is, and it can also display toolbars or actions. The breadcrumb bar consists of two rows, and both rows have icons on the left and right sides.

The first row of the breadcrumb bar contains the breadcrumb itself, which acts as a path indicating the current place where the agent is. On the right side of this row, the screen configuration is located. This part of the

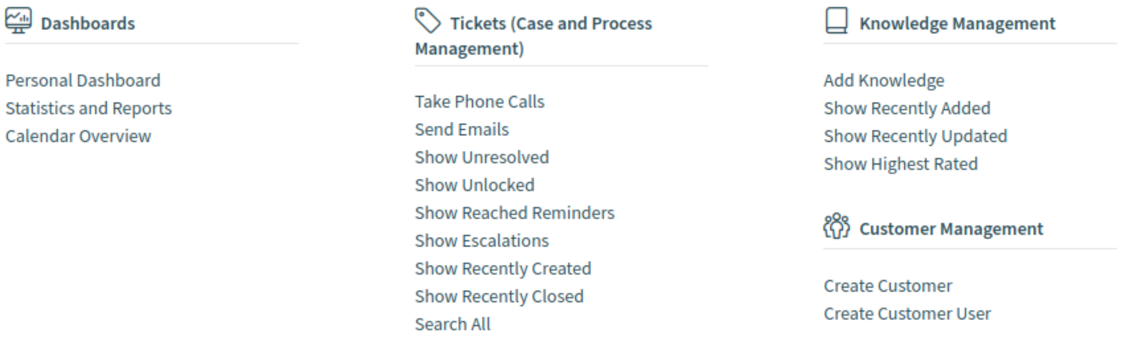

Dashboards
Personal Dashboard
Statistics and Reports
Calendar Overview
Tickets (Case and Process Management)
Take Phone Calls
Send Emails
Show Unresolved
Show Unlocked
Show Reached Reminders
Show Escalations
Show Recently Created
Show Recently Closed
Search All
Knowledge Management
Add Knowledge
Show Recently Added
Show Recently Updated
Show Highest Rated
Customer Management
Create Customer
Create Customer User

Fig. 3: Main Menu

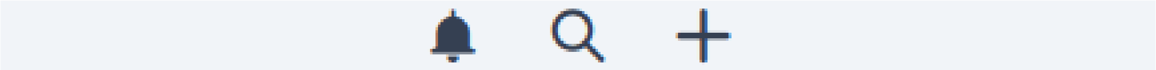


Fig. 4: Header Toolbar

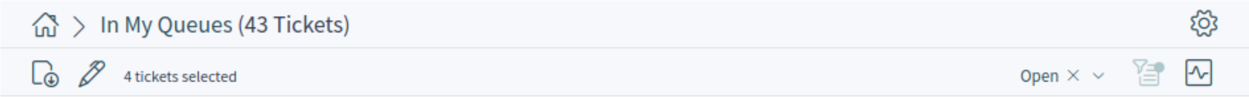

In My Queues (43 Tickets)
4 tickets selected
Open

Fig. 5: Breadcrumb Bar For Business Object List

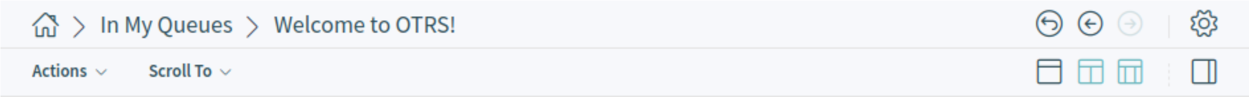

In My Queues
Welcome to OTRS!
Actions
Scroll To

Fig. 6: Breadcrumb Bar For Business Object Detail View

breadcrumb bar can contain buttons for navigation between business objects as well as a back link to return to the business object list.

The second row of the breadcrumb bar can be different for business object lists and business object detail views.

- For business object lists, the second row of the breadcrumb bar can contain export and bulk actions on the left side; filter presets, filter possibilities and pulse mode are on the right side.
- For business object detail views, the second row of the breadcrumb bar can contain the *Actions* menu and a *Scroll To* menu related to the business object; the column layouts and a button to show or hide the sidebar of the business object detail view are located to the right.

These features and actions are displayed only if the selected business object list or business object has such a menu.

The screen configuration is accessible via the gear icon. Every screen has such a menu. The configuration settings that are available depend on the screen that is being configured.

The same configuration screen can be used for all column layouts.

Select the layout you want to edit in the top of this screen. Next, the widgets of the current screen can be added, removed or rearranged. Any widget can be added multiple times. Each widget has its own settings.

For large screens, different column layouts can be selected. On small screens or in the mobile view, only the one column layout is available. The position of the widgets can be customized in the screen configuration settings.

Some business object detail views, like the detail view for *Tickets*, can contain a sidebar on the right side of the screen. This sidebar can be hidden from or displayed in the breadcrumb bar.

The content area of the screen can display a dashboard, business object list or business object detail view. These screens can contain a list of business objects or multiple widgets. The number of the widgets and the content of the widgets depend on the screen that the agent currently sees. Every widget can be customized by using its widget configuration settings.

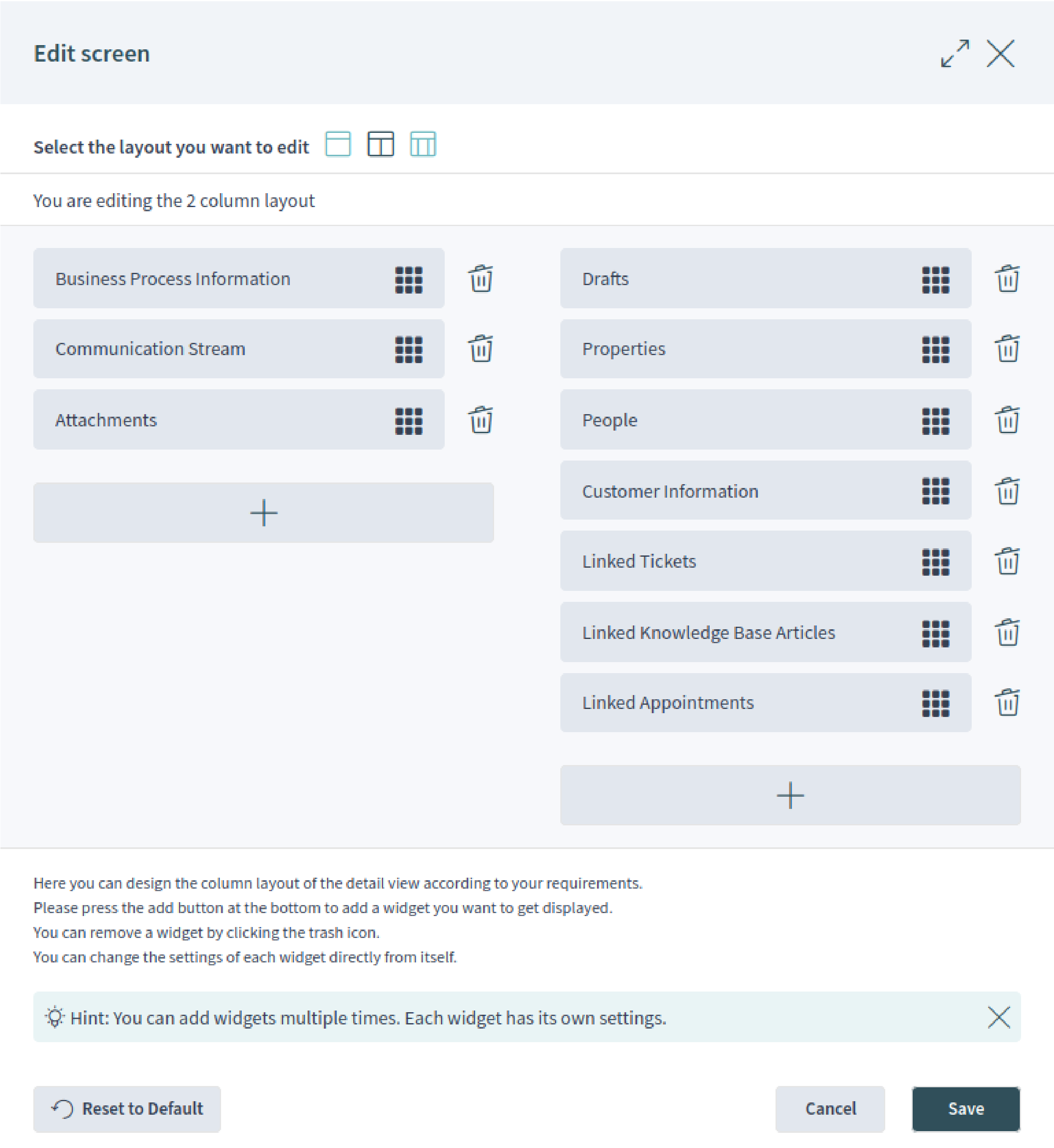
In the bottom right corner, the chat bubble is displayed. The chat bubble is always visible on top of any other elements to give quick access to *Chat*.

## 2.2 Business Objects

All components in **OTRS** are called business objects. Business objects can be:

- *Tickets*
- *Knowledge Base Articles*
- *Customers*
- *Customer Users*
- *Notifications*
- *Statistics and Reports*
- Other similar objects

The business objects have list views and detail views. The views have a similar structure and user experience.


Edit screen
Select the layout you want to edit
Business Process Information
Communication Stream
Attachments
Drafts
Properties
People
Customer Information
Linked Tickets
Linked Knowledge Base Articles
Linked Appointments
Reset to Default
Cancel
Save

You are editing the 2 column layout

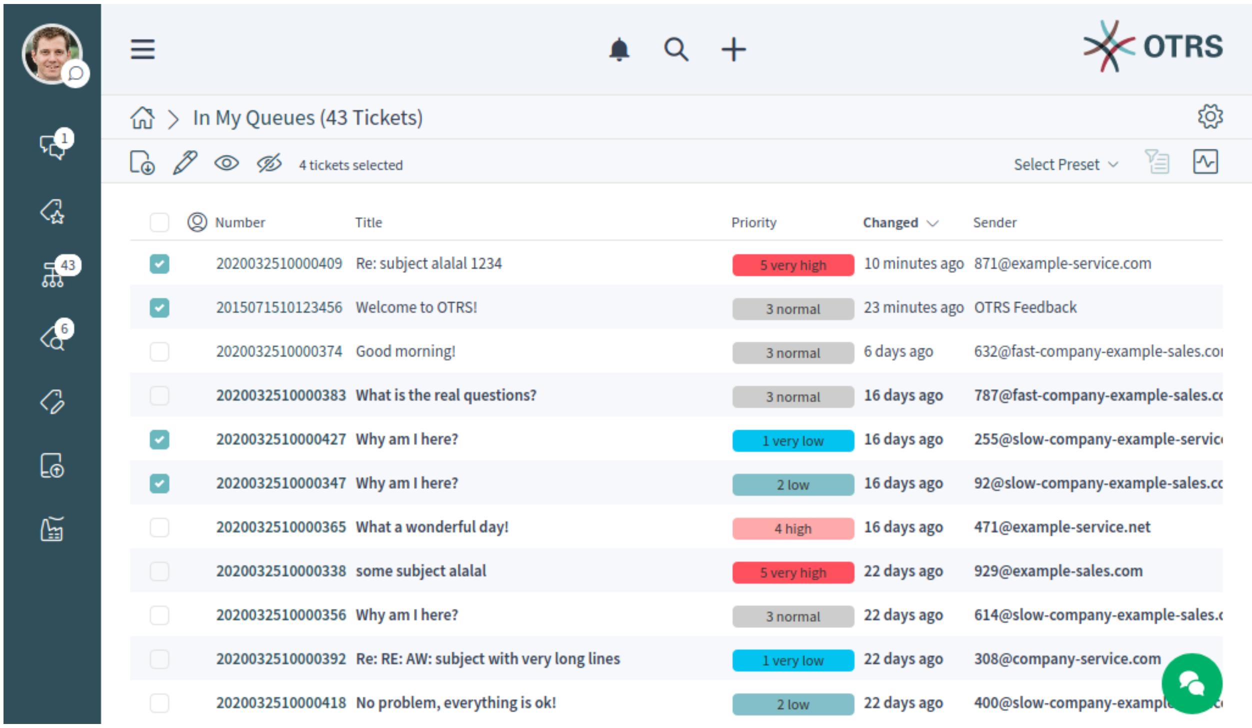
Here you can design the column layout of the detail view according to your requirements.
Please press the add button at the bottom to add a widget you want to get displayed.
You can remove a widget by clicking the trash icon.
You can change the settings of each widget directly from itself.

Hint: You can add widgets multiple times. Each widget has its own settings.

Fig. 7: Screen Configuration For Two-column Layout

## 2.3 Business Object Lists

The business object list displays a configured set of data containing business objects.



| ☐ | Number | Title | Priority | Changed | Sender |
|---|---|---|---|---|---|
| ☑ | 2020032510000409 | Re: subject alalal 1234 | 5 very high | 10 minutes ago | 871@example-service.com |
| ☑ | 2015071510123456 | Welcome to OTRS! | 3 normal | 23 minutes ago | OTRS Feedback |
| ☐ | 2020032510000374 | Good morning! | 3 normal | 6 days ago | 632@fast-company-example-sales.co |
| ☐ | 2020032510000383 | What is the real questions? | 3 normal | 16 days ago | 787@fast-company-example-sales.c |
| ☑ | 2020032510000427 | Why am I here? | 1 very low | 16 days ago | 255@slow-company-example-servic |
| ☑ | 2020032510000347 | Why am I here? | 2 low | 16 days ago | 92@slow-company-example-sales.c |
| ☐ | 2020032510000365 | What a wonderful day! | 4 high | 16 days ago | 471@example-service.net |
| ☐ | 2020032510000338 | some subject alalal | 5 very high | 22 days ago | 929@example-sales.com |
| ☐ | 2020032510000356 | Why am I here? | 3 normal | 22 days ago | 614@slow-company-example-sales. |
| ☐ | 2020032510000392 | Re: RE: AW: subject with very long lines | 1 very low | 22 days ago | 308@company-service.com |
| ☐ | 2020032510000418 | No problem, everything is ok! | 2 low | 22 days ago | 400@slow-company-exampl |

Fig. 8: Business Object List Example

If there are more items, a note at the end of the list informs the user about how many more items there are that cannot yet be displayed. By scrolling down, the business object list automatically loads more items until the end of the list is reached. The visible size of the list is remembered for reloads and navigation.

The page breadcrumb indicates the total number of found business objects depending on the filter criteria for the business object list.

The business object lists periodically check on the server side for data updates. For the list updates, default mode and pulse mode are available. You can activate this mode by clicking the pulse icon in the breadcrumb bar of business object list.

In default mode, new items that have to be shown in the current displayed list are not shown immediately. A notification on the the top of the business object list informs the user that new data is available. Clicking on this notifications refreshes the list and shows the list with updated data.

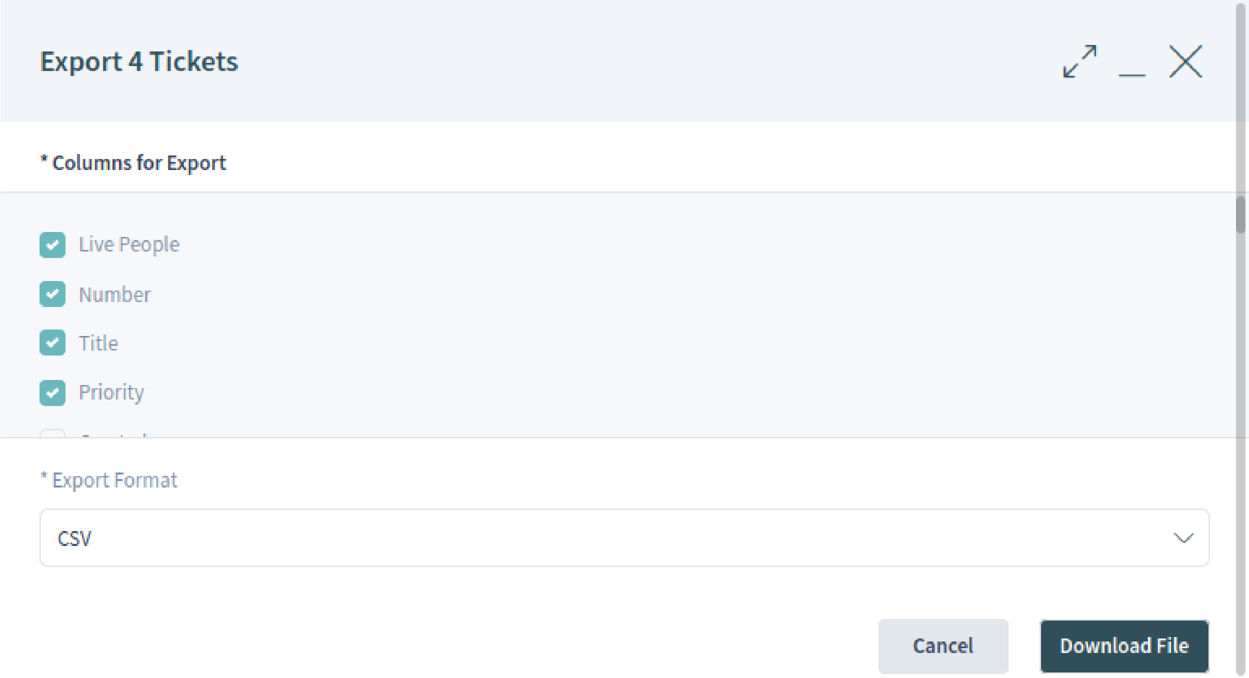
In pulse mode, updates to an item displayed in a business object list are applied immediately. The business object list will be refreshed periodically, including newly added or removed items. The rows associated with the affected objects are highlighted for a short time to indicate a change. If the update affects an item that is no longer to be displayed in the current list, the corresponding item is highlighted in red, and after a few seconds, it will be removed from the list.

The columns of the business object lists are sortable. Clicking on any visible and sortable column replaces the current sorting criteria and re-sorts the data based on the column’s data. A sorted column is indicated by a small arrow at the top of the column.

The business object list can support exporting and editing of multiple objects at once. The export feature allows a user to export one or more objects selected in the business object list, and the bulk edit feature allows the user to edit the properties of the selected objects at one time.

To export the objects:

1. Select one or more object in the business object list.
2. Click on the download icon in the breadcrumb bar.
3. Add, remove or rearrange the columns and select the export format.
4. Click on the *Download File* button.



Export 4 Tickets

* Columns for Export

☑ Live People
☑ Number
☑ Title
☑ Priority

* Export Format

CSV

Fig. 9: Business Object List Export

To edit the properties of the objects:

1. Select one or more object in the business object list.
2. Click on the pen icon in the breadcrumb bar.
3. Change the properties of the selected objects.
4. Click on the *Execute Bulk Action* button.

The business object list supports inline editing of objects. Not all properties can be edited inline.

To edit a property of an object:

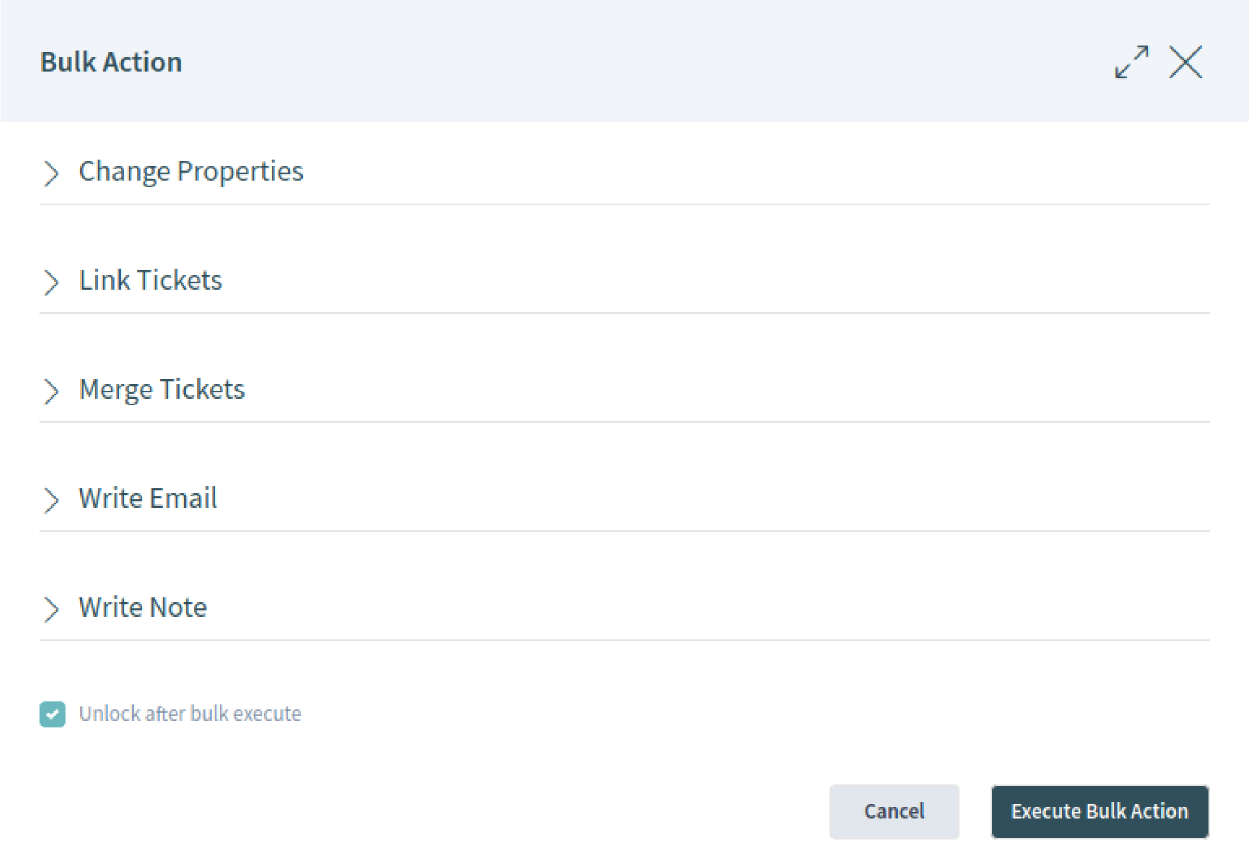
1. Hover the mouse over the property value in the list and wait for the popover field.
2. Change the value of the property.
3. Click on the *Save* button.

It is possible to select all objects that are currently visible in the list. To do this, select the checkbox in the table header.

---

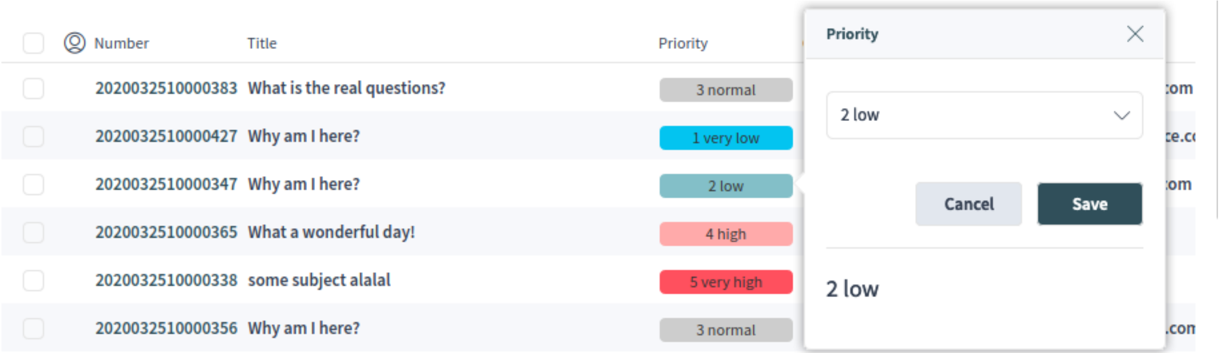
**Note:** If the list contains more objects than could be displayed, the non-visible objects are not selected.

---


Bulk Action
Change Properties
Link Tickets
Merge Tickets
Write Email
Write Note
Cancel
Execute Bulk Action

☑ Unlock after bulk execute

Fig. 10: Business Object List Bulk Action



| ☐ | Number | Title | Priority |
|---|---|---|---|
| ☐ | 2020032510000383 | What is the real questions? | 3 normal |
| ☐ | 2020032510000427 | Why am I here? | 1 very low |
| ☐ | 2020032510000347 | Why am I here? | 2 low |
| ☐ | 2020032510000365 | What a wonderful day! | 4 high |
| ☐ | 2020032510000338 | some subject alalal | 5 very high |
| ☐ | 2020032510000356 | Why am I here? | 3 normal |

Priority: 2 low

Cancel
Save
2 low

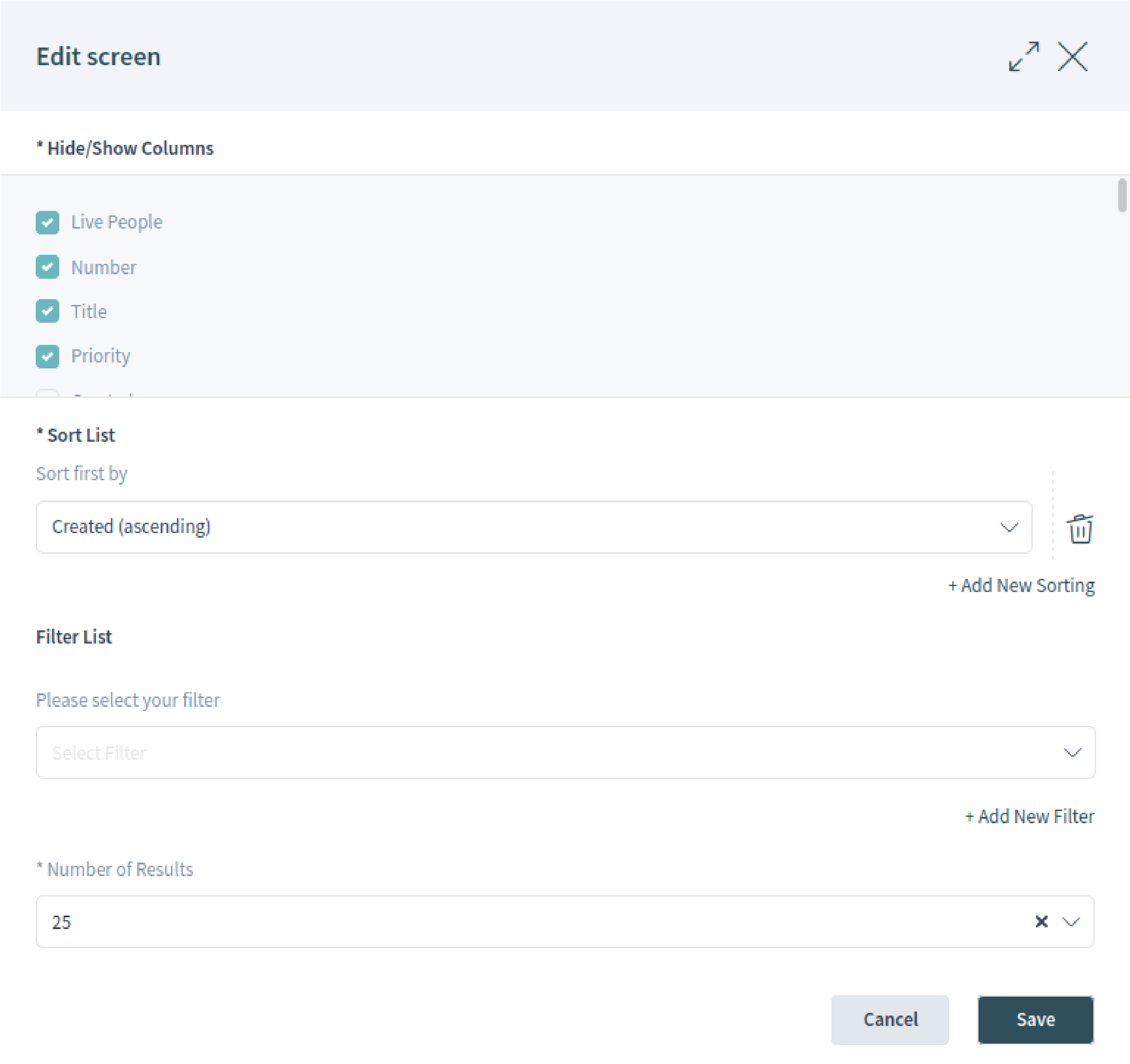
Fig. 11: Business Object List Inline Edit

To select all objects that are currently not visible:

1. Scroll down the list to display all objects.
2. Scroll up and select the checkbox in the table header.

The table header will display how many objects are selected.

The business object lists have a screen configuration and a non-permanent configuration that can be set by using the filter functions. The screen configuration of a business object list can be configured using the cog wheel icon in the upper right corner. The non-permanent screen configuration is never saved or synchronized, but allows for the saving of named filter presets.



Edit screen

* Hide/Show Columns

☑ Live People
☑ Number
☑ Title
☑ Priority

* Sort List

Sort first by: Created (ascending)

Filter List

Please select your filter: Select Filter

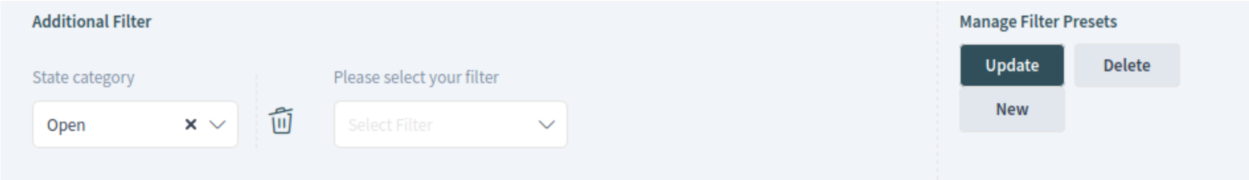
* Number of Results: 25

Fig. 12: Business Object List Screen Configuration

In the screen configuration, the columns displayed in the business object list can be added, removed or rearranged. The list can be sorted and filtered, and the number of results to be displayed can be selected.

This number of objects will be loaded the first time the list is displayed and for each time the list is scrolled down.

The filter section allows users to manage which filters are applied and to narrow the list of business objects. It is also possible to save a configured filter setup as a filter preset. The saved filter preset and the filter section are available using the filter icon in the breadcrumb bar.



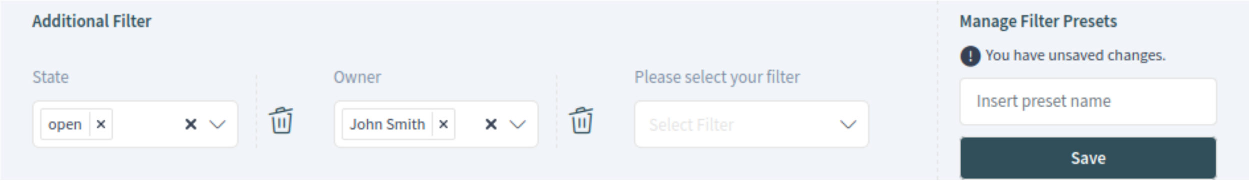
State category: Open

Fig. 13: Business Object List Filter Preset

New filter presets can be created and existing filter presets can be updated or deleted.

To create a new filter preset:

1. Click on the *New* button.
2. Configure a filter setup by adding some filters.
3. Enter a name for the filter preset.
4. Click on the *Save* button.



State: open

Owner: John Smith

You have unsaved changes.

Fig. 14: Business Object List Filter

When a filter is selected, a new filter field will be displayed to select another filter. There is a huge list of possible filters, and there is no limitation for the number of used filters. There are filters that use a text input field and other filters that have a drop-down list to select only one or multiple options.

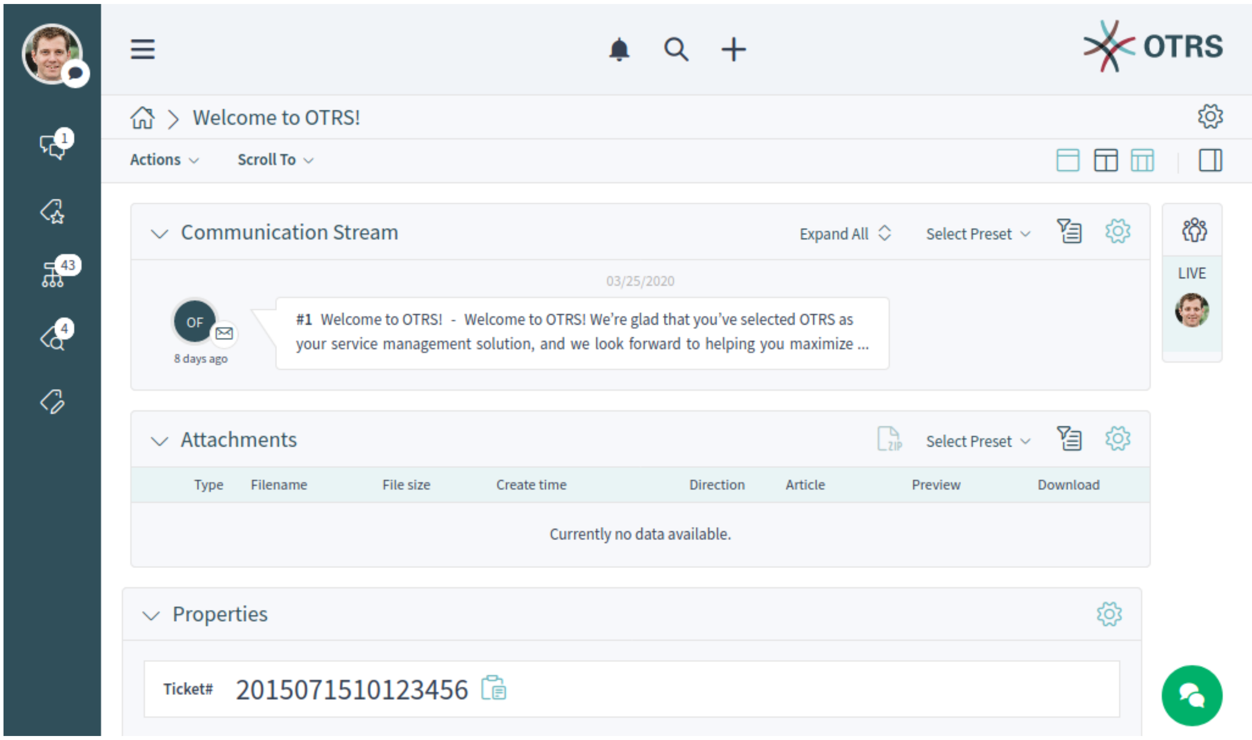
The filters can be removed with the trash icon next to the field.

## 2.4 Business Object Detail Views

Clicking on an object in the business object list opens the detail view of the object. The detail view remembers the context of the business object list. If you go back to a business object list from a detail view, the business object list is opened again and the object is highlighted, if it still exists.

The business object detail view has an *Action* menu in the breadcrumb bar. The number of actions depends on the configuration and the type of business object. Each action opens a dialog in the right side of the screen, which contains a form for the selected action.

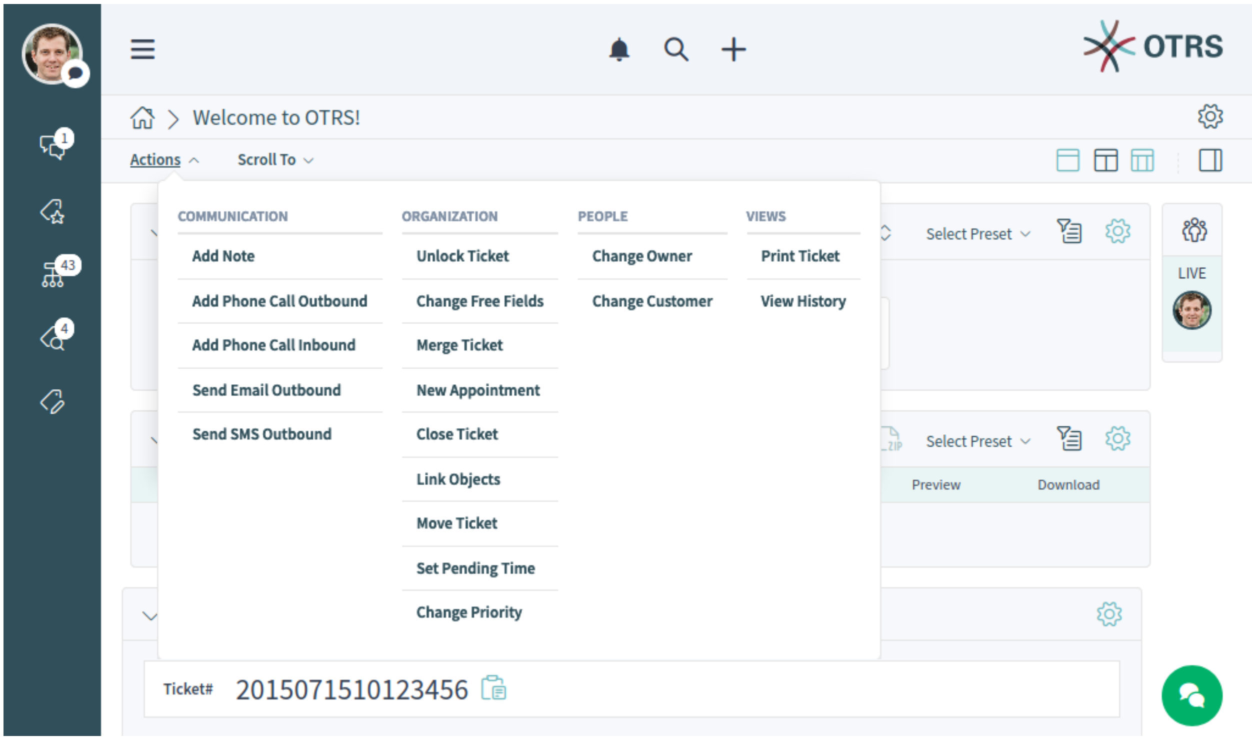
The content area of the business object detail view consists of widgets that hold the main content. The widgets can be displayed in one, two or three column layouts. The number and type of the widgets depend on the displayed business object and can be customized in the screen configuration.


OTRS
Welcome to OTRS!
Actions
Scroll To
Communication Stream
Expand All
Select Preset
03/25/2020
OF
8 days ago
Attachments
Select Preset
Type
Filename
File size
Create time
Direction
Article
Preview
Download
Currently no data available.
Properties
LIVE
1
43
4

#1 Welcome to OTRS! - Welcome to OTRS! We're glad that you've selected OTRS as your service management solution, and we look forward to helping you maximize ...

Ticket# 2015071510123456

Fig. 15: Business Object Detail Example

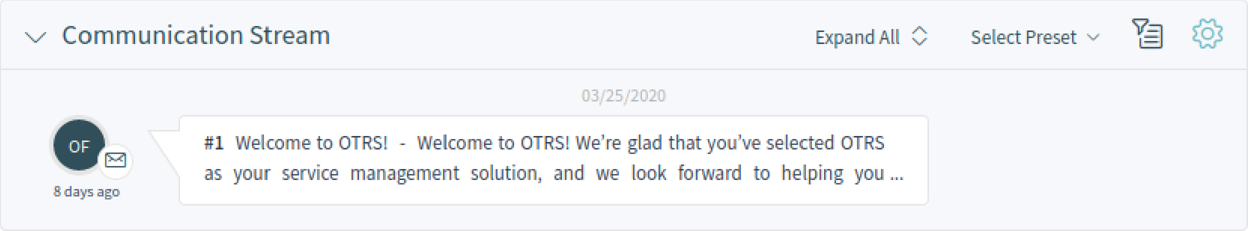

OTRS
Welcome to OTRS!
Actions
Scroll To
COMMUNICATION
Add Note
Add Phone Call Outbound
Add Phone Call Inbound
Send Email Outbound
Send SMS Outbound
ORGANIZATION
Unlock Ticket
Change Free Fields
Merge Ticket
New Appointment
Close Ticket
Link Objects
Move Ticket
Set Pending Time
Change Priority
PEOPLE
Change Owner
Change Customer
VIEWS
Print Ticket
View History
Select Preset
Select Preset
Preview
Download
LIVE
1
43
4

Ticket# 2015071510123456

Fig. 16: Business Object Detail View Actions

Use the *Scroll To* menu in the breadcrumb bar to jump quickly to the selected widget. This menu contains all widget names that are visible on the screen, and it has the same layout as the widgets that are configured in the screen configuration.

Each widget has a header with the name of the widget and a chevron icon to collapse or expand the widget itself. The *Select Preset* option shows the configured and named filter from the *Filter* section. Finally, the widget configuration is located in the right side of the header.



#1 Welcome to OTRS! - Welcome to OTRS! We're glad that you've selected OTRS as your service management solution, and we look forward to helping you ...

Fig. 17: Widget Overview

The content of a widget can be a table, a content area, or can consist of multiple content cards.

Most of the widgets have a filter possibility to narrow the results displayed in the widget' s content. The filter options can be shown or hidden with the filter icon.

**See also:**

The widget filters work in the same way as the business object list filters. The widget filters also support filter presets.

The widget configuration is accessible via the gear icon. Every widget has such a menu, and the content of this setting depends on the widget.

The following configuration options can be available for the widgets. The configuration options depend on the widget. The fields marked with an asterisk are mandatory.

**Widget Title** Here, the default name of the widget can be changed. If a new name is entered, this name will be displayed in the header of the widget.

**Hide/Show Columns** In this list, columns should be visible in the widget can be selected. This applies only if the widget content is displayed in a table form.

**Show Lists** In this list, cards which should be visible in the widget can be selected. This applies only if the widget content is displayed as content cards.

**Sort List** Here, order criteria and the sorting for the content of the widget can be selected.

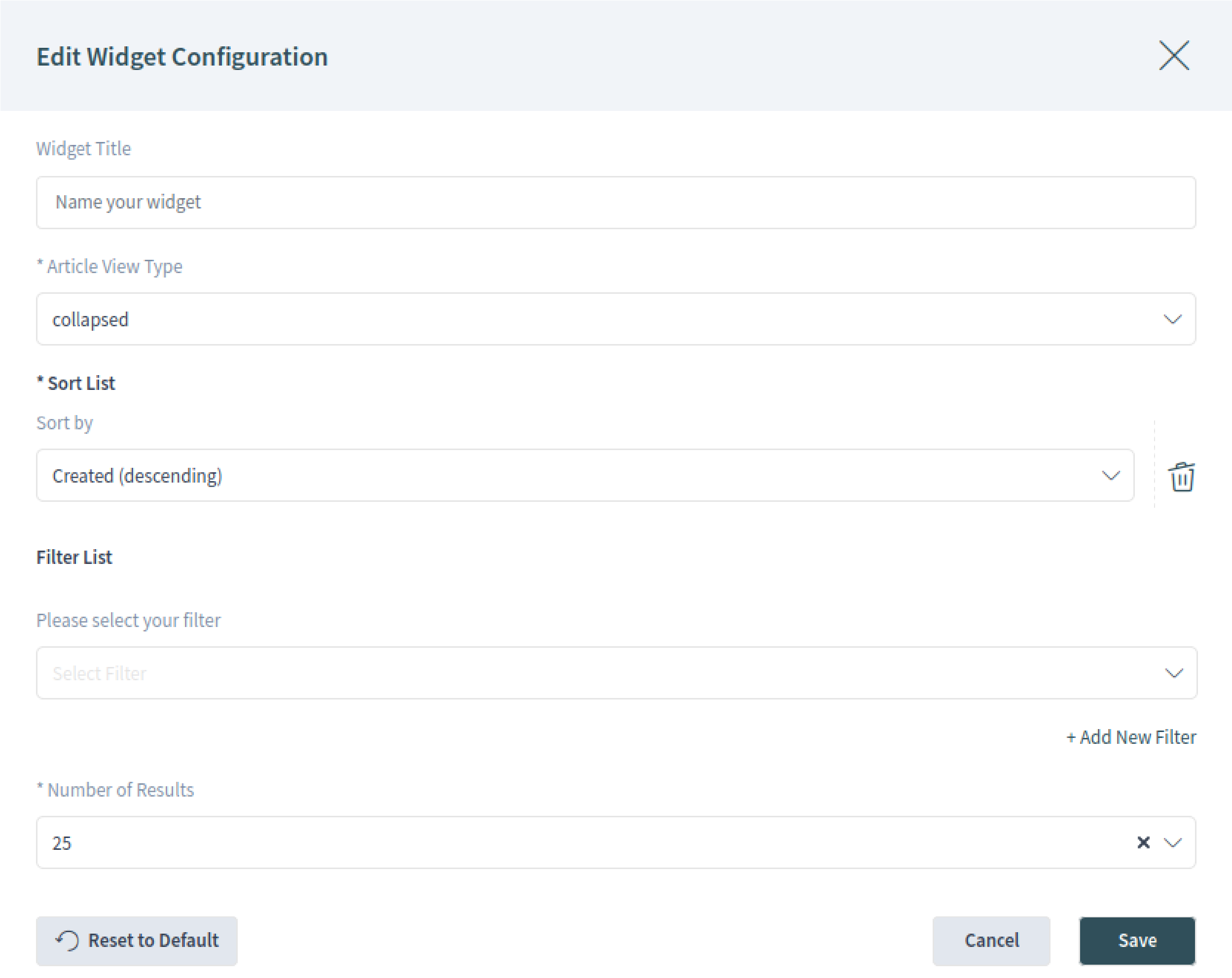
Some widgets support only one sorting criterion, while other widgets can support up to three criteria. If more criteria is available, you can add a new one with the + *Add New Sorting* link until the sorting limit is reached.

**Filter List** Here, filter criteria for the content of the widget can be selected.

Any available filter options can be selected at the same time. You can add a new one with the + *Add New Filter* link.

**Number of Results** Here, the number of entries that will be loaded the first time the list is displayed and for each time the list is scrolled down can be defined.

As you can see, working with the agent interface is quite easy and intuitive thanks to the modular design of **OTRS**. The next chapters explain the special features and usages available to the specific business objects.



Edit Widget Configuration

Widget Title

Name your widget

* Article View Type

collapsed

*** Sort List**

Sort by

Created (descending)

**Filter List**

Please select your filter

Select Filter

+ Add New Filter

* Number of Results

25

Reset to Default
Cancel
Save

Fig. 18: Widget Configuration

# CHAPTER 3

# Personalization

The personalization menu contains general settings for the agent account, security possibilities to protect this account by using a password and two-factor authentication, notification settings, chat availability states and an editor to customize the organizer.

The personal preferences can be set via the avatar image in the top left corner of the organizer sidebar.

Every menu item has a search box in the top of the widget to search for a specific setting.

## 3.1 User Profile

This menu item contains general settings for the agent account.

**Avatar** Here, the image used as an avatar image can be changed. It is possible to upload an avatar image directly, or you can register your email address on Gravatar to use this feature. Otherwise the first letters of the agent's first and last name will be displayed.

**Note:** The file size should not exceed 1 MB for an uploaded image.

**Language** Here, the language for the user interface can be selected.

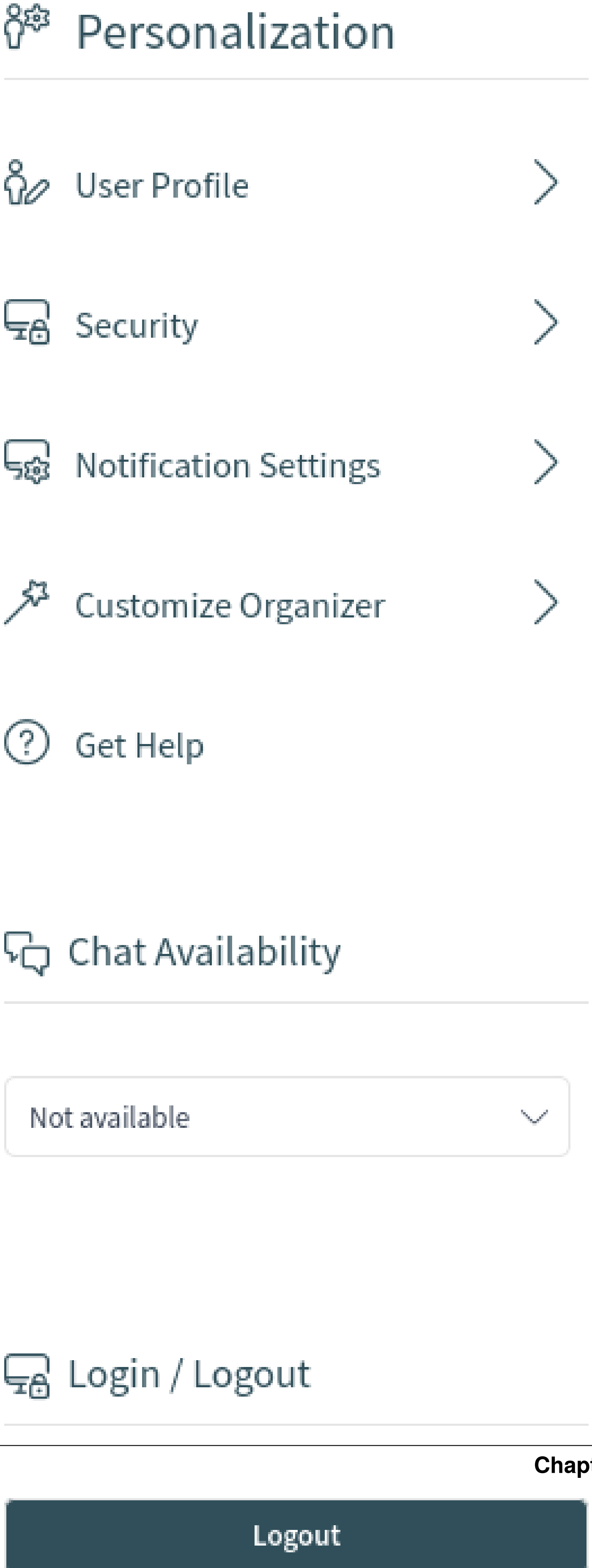
Only those languages for which the translation completeness is at least 95% are listed by default. To see all available languages, click on the globe icon next to the drop-down list.

**See also:**

Translation status of incomplete languages is low, but you can help to improve the translation. See the developer manual for more information about translating **OTRS**.

**Style** Here, the style which should be used for the user interface can be selected. For some styles, the *Variant* can also be chosen.

**Time Zone** The time zone used by the user interface to display time values can be selected here. Just start typing the name of the capital city of your current location.


Personalization
User Profile
Security
Notification Settings
Customize Organizer
Get Help
Chat Availability
Not available
Login / Logout
Logout

**Date Time Format** Here, agents can select how the date and time are displayed.

**Out of Office Time** Use the calendar entries to set the start and the end date for your out of office days. Multiple entries can be added here.

When you have finished updating the settings, press the *Save* button.

## 3.2 Security

This menu item contains the settings to protect the agent account.

**Change Password** Here, the current password of the agent can be changed by entering the old and the new passwords.

**Two-factor Authentication** Here can be added an additional authentication method, which is called two-factor authentication. Two-factor authentication acts as a second password to protect the account. While the normal password is something that the agent has to know, the two-factor token is something that the agent has to own. This means, if an agent enters the username and the password, then a token will be sent via email, SMS, or via a pre-configured authenticator application.

To pick a two-factor authentication method:

1. Click on the *Setup* button.
2. Enter your current password.
3. Follow the instructions you see on the screen.

This setting uses the same steps that are already explained in the *Login to Agent Interface* chapter.

## 3.3 Notification Settings

This menu item contains the settings related to notifications.

**My Queues** Here, the agent's preferred queues can be selected.

**My Services** Here, the agent's preferred services can be selected.

**My Chat Channels** Here, preferred chat channels can be selected.

**Ticket Notifications** In this widget, the methods used for any kind of ticket notification can be selected.

The possible methods are *Email*, *Web View* or *SMS*.

**Appointment Notifications** In this widget, the methods used for any kind of appointment notification can be selected.

The possible methods are *Email*, *Web View* or *SMS*.

## 3.4 Customize Organizer

This menu item contains the organizer sidebar customization possibilities.

The organizer sidebar displays the items that are currently added to the organizer. It is possible to add new items or edit the existing items. An item can be added more than once: This is useful if the same item is needed but with a different configuration.

To add an item to the organizer sidebar:

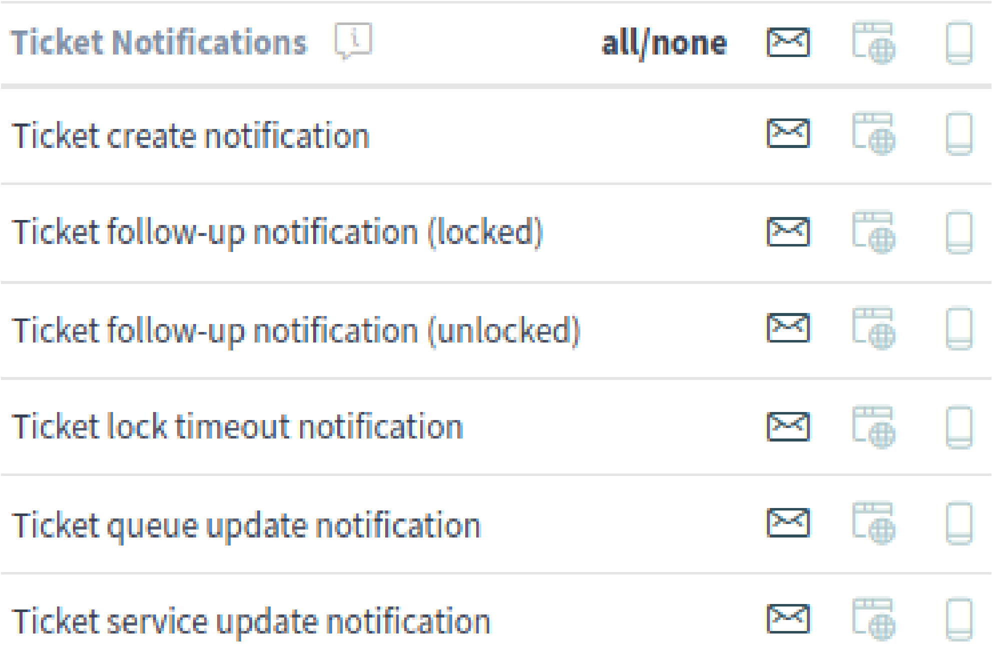

Ticket Notifications
all/none
Ticket create notification
Ticket follow-up notification (locked)
Ticket follow-up notification (unlocked)
Ticket lock timeout notification
Ticket queue update notification
Ticket service update notification

Fig. 2: Ticket Notifications Widget

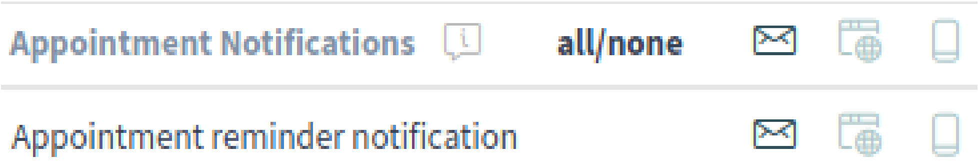

Appointment Notifications
all/none
Appointment reminder notification

Fig. 3: Appointment Notifications Widget

1. Click on the + icon to add a new item.
2. Toggle the icon chooser to set a different icon.
3. Enter a name for the new item.
4. Select the item type from the list.
5. Click on the *Customize* option to customize the item.
6. Click on the *Finish Customization* button.
7. Click on the *Save* button.

To edit an item in the organizer sidebar:

1. Select an item from the sidebar.
2. Change the icon and the name of the item, if needed.
3. Click on the *Customize* option to customize the item.
4. Click on the *Finish Customization* button.
5. Click on the *Save* button.

The customization possibilities of an item depend on the item type. In the customization screen, it is possible to hide and show columns for the item list; select sorting criteria and the sorting orders; define filters for the objects; and set the number of results that can be selected. This number of objects will be loaded the first time the list is displayed and for each time the list is scrolled down.

Every organizer item can be moved up and down to change its position in the sidebar. They can can be cloned to make the configuration easier, and of course, they can be deleted as well.

With the *Reset to Deafult* button, it is possible to reset the organizer to the default state.

## 3.5 Get Help

This menu item is a link to the user manual of the agent interface. It points to the Documentation Portal.

## 3.6 Chat Availability

Here, the agent can specify if he/she is available for chat or not.

**Not available** Not available for any chats.

**Internal** Only available for agent-to-agent chats.

**Internal & external** Available for agent-to-agent, agent-to-customer, customer-to-agent, and public-to-agent chats.

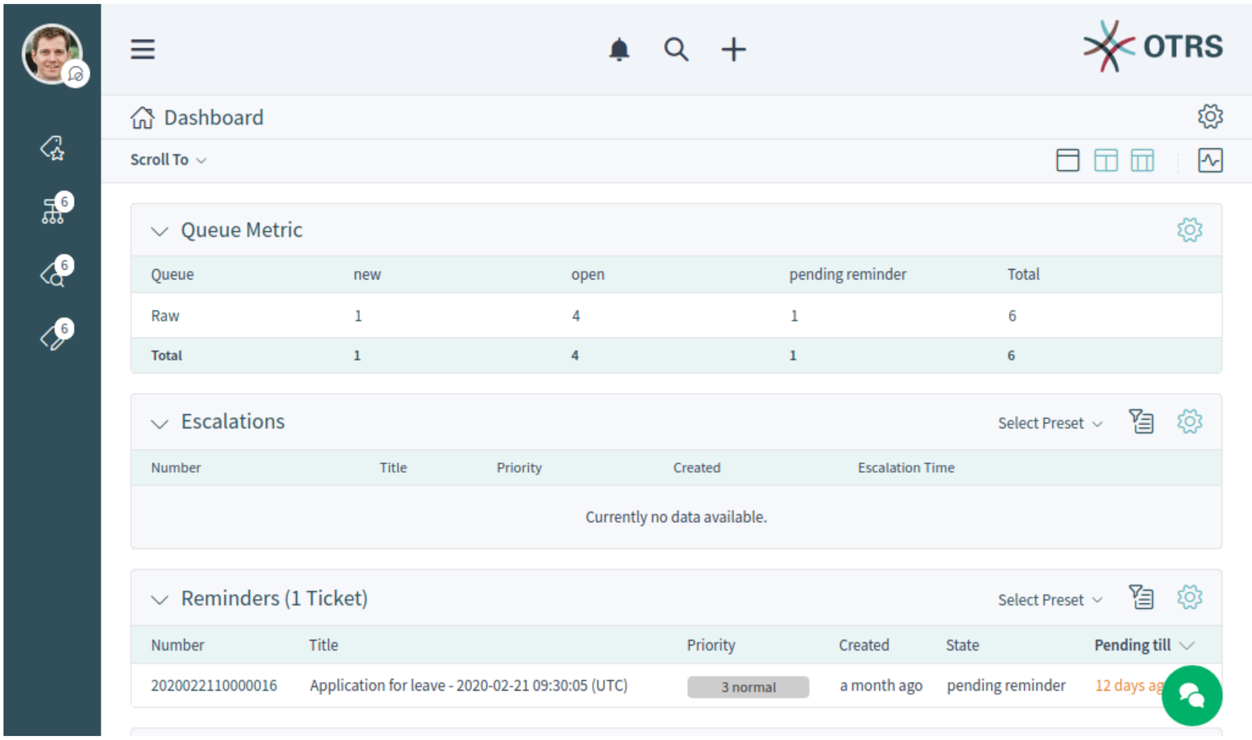
## 3.7 Login / Logout

This section is used to logout from the system. Just click on the *Logout* button to exit.

CHAPTER 4

# Personal Dashboard

The personal dashboard collects all the information that agents need for their daily tasks. The personal dashboard contains several widgets that display the most important objects and lists.



Queue Metric

| Queue | new | open | pending reminder | Total |
|---|---|---|---|---|
| Raw | 1 | 4 | 1 | 6 |
| **Total** | **1** | **4** | **1** | **6** |

Escalations

| Number | Title | Priority | Created | Escalation Time |
|---|---|---|---|---|

Currently no data available.

Reminders (1 Ticket)

| Number | Title | Priority | Created | State | **Pending till** |
|---|---|---|---|---|---|
| 2020022110000016 | Application for leave - 2020-02-21 09:30:05 (UTC) | 3 normal | a month ago | pending reminder | 12 days ag |

Fig. 1: Personal Dashboard

The personal dashboard is accessible from any part of the software by clicking on the house icon in the breadcrumb bar or by clicking on the logo in the top right corner.

The term *personal* means that every agent can customize their dashboard. It is possible to add, remove, reorder and configure the widgets. They can apply filters on each widgets and rename the widgets to their needs.

**See also:**

Take a look at the *Navigation And Usage* chapter for more information.

CHAPTER 5

# Tickets

Agents can communicate with customer users via email, phone or SMS, and agents can communicate with other agents via notes. Additionally, it is possible to start processes, which can affect both agents and customer users.

The communication for all of these is managed by using tickets. This means, **OTRS** will convert any type of communications into tickets, and it will add the related messages as articles to the ticket.

## 5.1 Create Ticket

Use this screen to add a new ticket to the system. The ticket create screen is available from the main menu and from the action menu, as well as from the customer and customer user cards.

When agents start the communication, they can create *email tickets*, *phone tickets*, *process tickets* or *SMS tickets*. All communications result in a ticket, and the first message is added to the ticket as an article.

**Email Ticket** Email ticket is used to send an email to the customer user or to other recipients when the ticket is created.

**Phone Ticket** Phone ticket is used to record the information gathered during a phone call with the customer user. When the ticket is created, no email will be sent to the customer user. The ticket is treated as if it was originally created by the customer user.

**Process Ticket** Creating a process ticket will start a defined process. The agents and the customer users have to follow the steps that are provided by the process. Any message created during a process ticket will create new articles in this ticket.

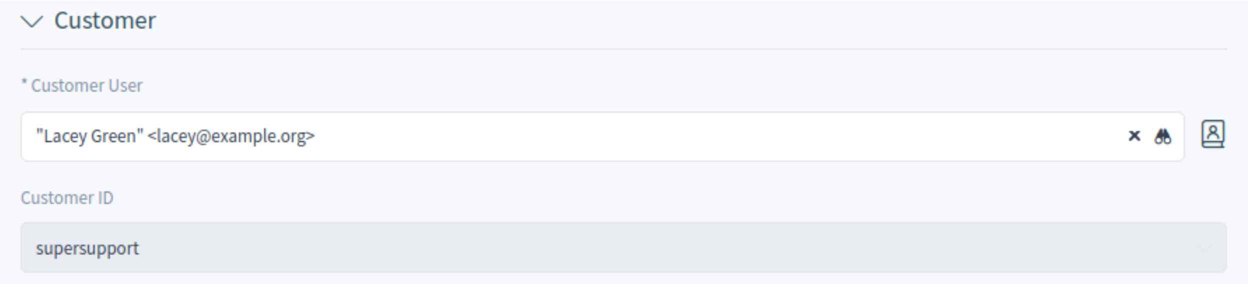
**SMS Ticket** SMS ticket is used create a ticket and send the first article via SMS to the customer user. SMS ticket has a limited body size to fit the text to SMS length restrictions.

The following section explains how an agent can create a new request in the agent interface for the customer user. Creating email tickets, phone tickets and SMS tickets are almost the same, so the following sections will describe the ticket creation in a general manner.

### 5.1.1 Properties Widget

The *Properties* widget is used to create the request for the customer user. This widget consists of four sections: *Customer*, *Assignment*, *Service Level Management* and *Communication*.

**Customer** In this section, the customer user for whom the new ticket is being created can be selected. The customer user can be selected by typing the name into the field or by using the customer address book next to the field. Using the wildcard character * is possible to search for the customer user.



* Customer User: "Lacey Green" <lacey@example.org>

Customer ID: supersupport

Fig. 1: Select Customer User

**Customer User *** The person for whom the ticket is created.

**Customer ID** This field will be auto-populated by selecting a customer user.

**Assignment** In this section, the queue to which the ticket should be assigned, as well as the owner and the responsible of the ticket, are selected. The queue selection is mandatory.

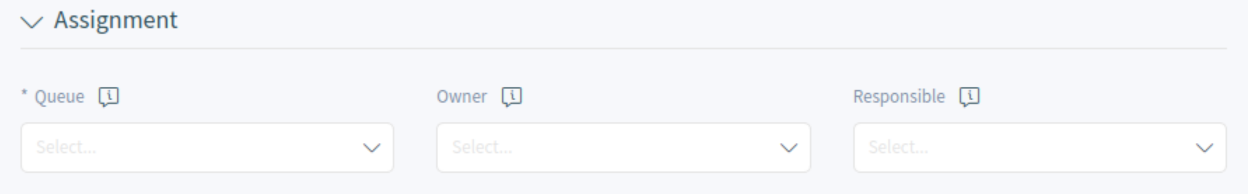


Fig. 2: Queue And Owner Selection

**Queue *** The queue into which the new ticket will be placed.

**Owner** The owner is the agent who will actually work with the new ticket.

**Responsible** The responsible agent will be responsible for the ticket. This agent has the same permissions as the owner.

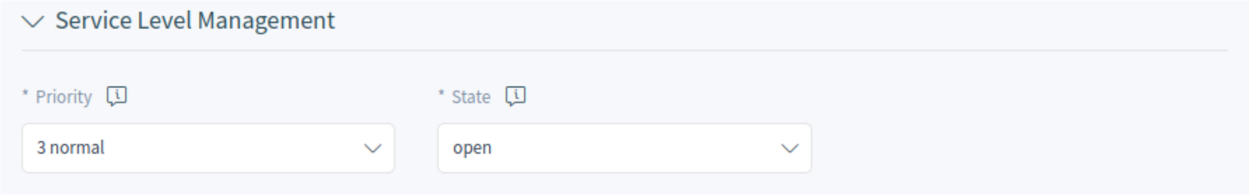
**Note:** The responsible feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

**Service Level Management** In this section, the priority and the next ticket state can be selected.

**Priority *** New tickets have a *3 normal* priority by default. Select another priority if you want to change it.

**State *** New tickets are in an *open* state by default. Select another state if you want to change it.

**Communication** In this section, a message much like you would find in an email client can be entered. This section is different for phone tickets and email tickets.



* Priority: 3 normal

* State: open

Fig. 3: Priority And State Selection

In the widget configuration of this widget, it is possible to set whether the next screen after creation of a ticket is the create screen again or the detail view of the created ticket.

**From *** This field is available only for phone tickets, and it is mandatory. This is because a phone ticket is treated as if it was created by the customer user.

**To *** For an email ticket, this will be the person for whom the ticket was created. This will be used in the *To* field of the email that is generated.

> **Note:** Usage of wildcards (*) is also possible. Enter two asterisks (**) to list all customer users.

For phone tickets, the *To* field is read-only and will be auto-populated with the queue selected in the previous section.

**Cc** Select other customer users as carbon copy on the email, if needed. This field is displayed only for email tickets.

**Bcc** Select other customer users as blind carbon copy on the email, if needed. This field is displayed only for email tickets.

**Text Template** It is possible to select a text template for the new ticket. The content of the template will overwrite existing texts.

**Subject *** The subject of the ticket is like the subject of an email.

**Body *** The body text of the first article of the ticket.

**Signature** This field is only applied to email tickets and appends a pre-configured signature text to the body text.

**Attachments** It is possible to add attachments to the ticket. Click on the field to add an attachment, or just drop some files here.

**Time Units** Enter any amount of time that is to be used in time accounting.

### 5.1.2 Customer Information Widget

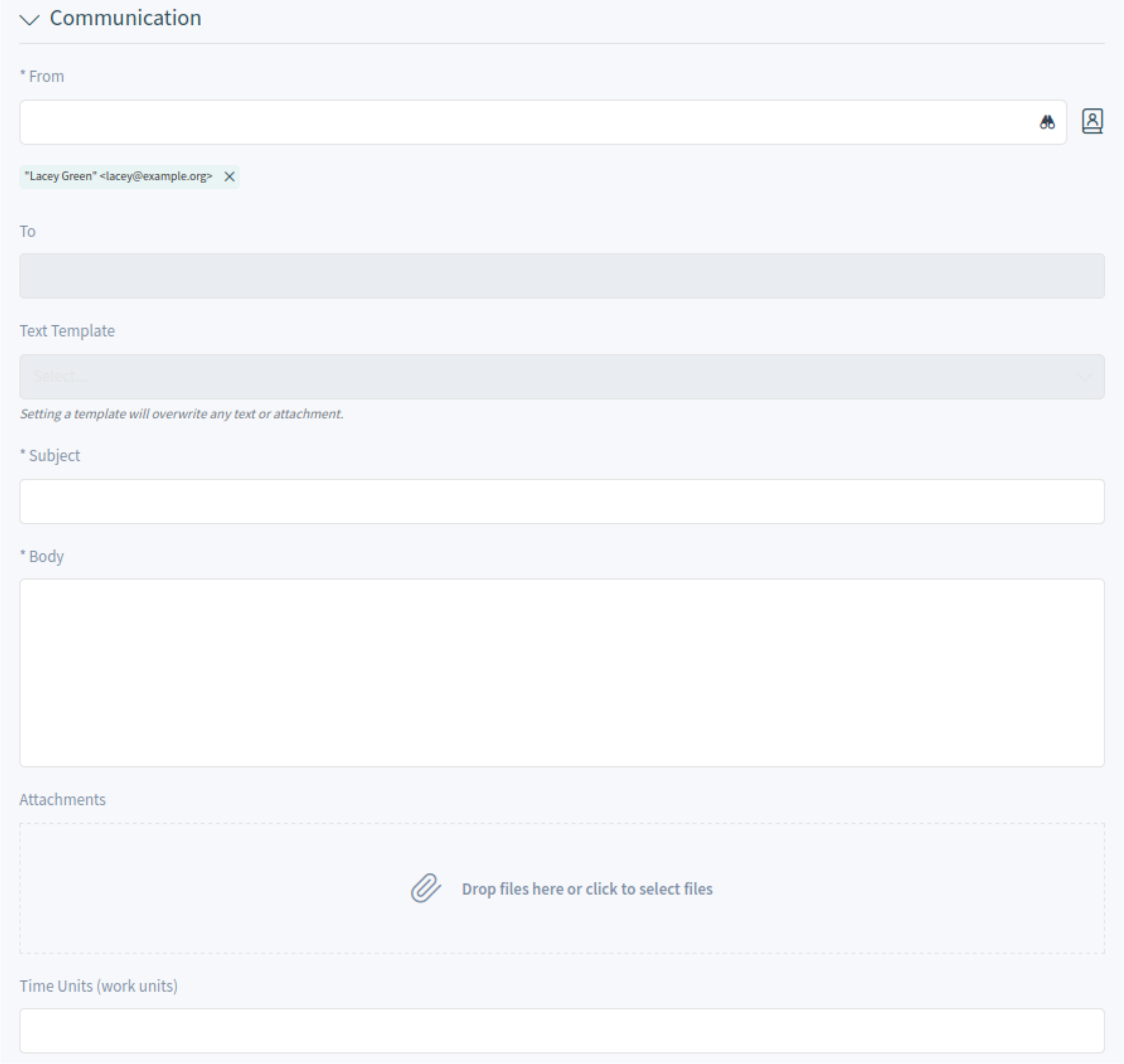
This widget displays detailed information about the selected customer user and about its customer.

### 5.1.3 Customer User History Widget

This widget shows the tickets for the customer user selected above.

### 5.1.4 Customer History Widget

This widget shows the tickets for the customer selected above.



Communication

* From

"Lacey Green" <lacey@example.org>

To

Text Template

Select...

*Setting a template will overwrite any text or attachment.*

* Subject

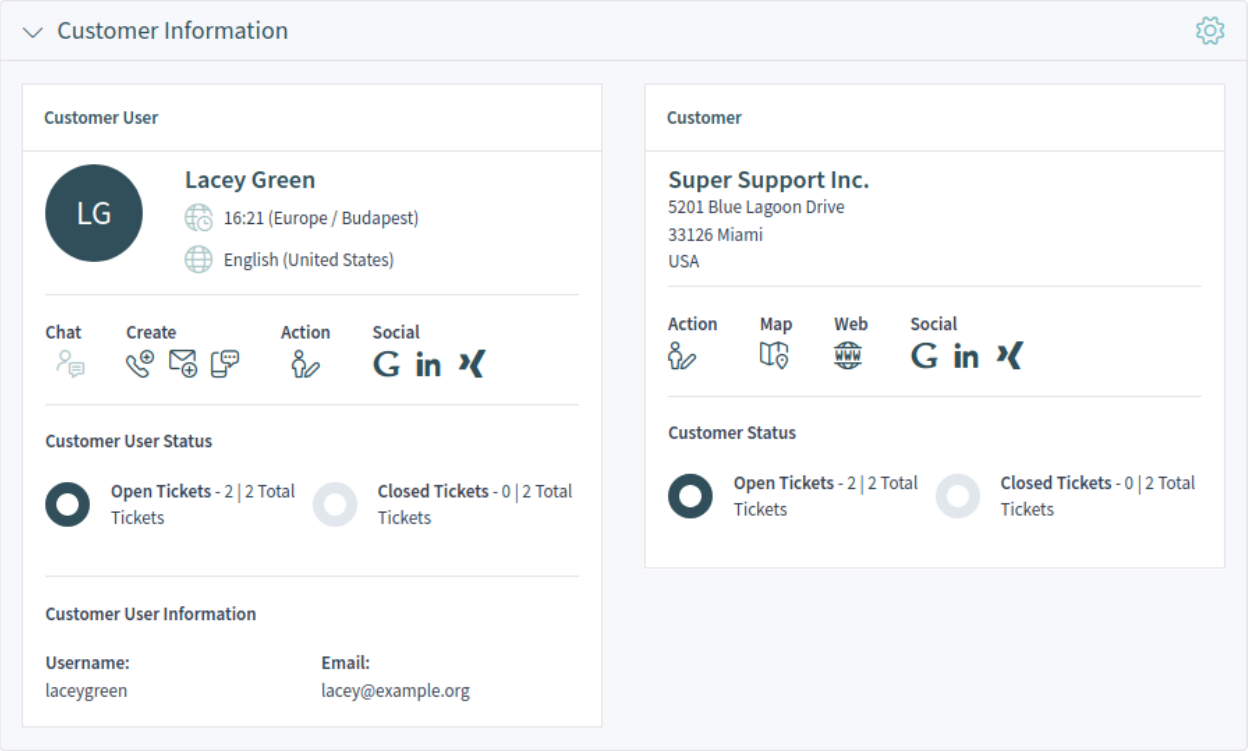
* Body

Attachments

Drop files here or click to select files

Time Units (work units)

Fig. 4: Write The Message


Customer Information
Customer User
LG
Chat
Create
Action
Social
Customer
Action
Map
Web
Social

**Customer User**

Lacey Green
16:21 (Europe / Budapest)
English (United States)

Customer User Status

Open Tickets - 2 | 2 Total Tickets
Closed Tickets - 0 | 2 Total Tickets

Customer User Information

Username: laceygreen
Email: lacey@example.org

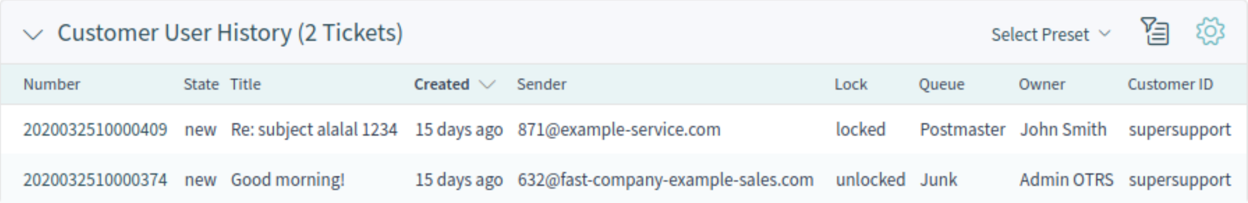
**Customer**

Super Support Inc.
5201 Blue Lagoon Drive
33126 Miami
USA

Customer Status

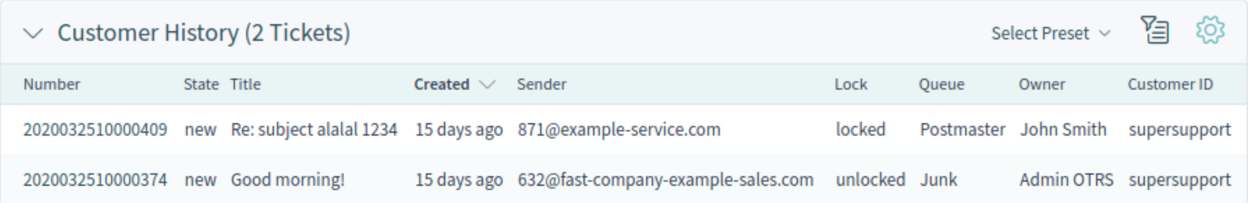
Open Tickets - 2 | 2 Total Tickets
Closed Tickets - 0 | 2 Total Tickets

Fig. 5: Customer Information Widget


Customer User History (2 Tickets)
Select Preset

| Number | State | Title | Created | Sender | Lock | Queue | Owner | Customer ID |
|---|---|---|---|---|---|---|---|---|
| 2020032510000409 | new | Re: subject alalal 1234 | 15 days ago | 871@example-service.com | locked | Postmaster | John Smith | supersupport |
| 2020032510000374 | new | Good morning! | 15 days ago | 632@fast-company-example-sales.com | unlocked | Junk | Admin OTRS | supersupport |

Fig. 6: Customer User History Widget

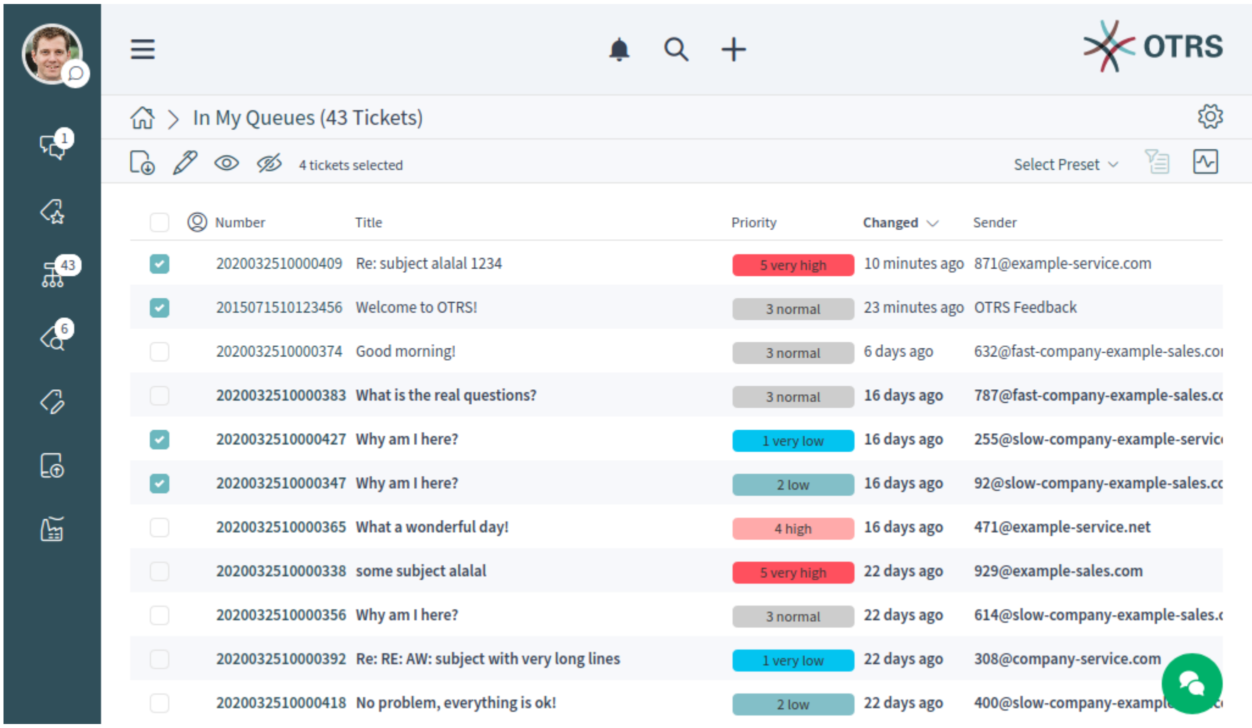

Customer History (2 Tickets)
Select Preset

| Number | State | Title | Created | Sender | Lock | Queue | Owner | Customer ID |
|---|---|---|---|---|---|---|---|---|
| 2020032510000409 | new | Re: subject alalal 1234 | 15 days ago | 871@example-service.com | locked | Postmaster | John Smith | supersupport |
| 2020032510000374 | new | Good morning! | 15 days ago | 632@fast-company-example-sales.com | unlocked | Junk | Admin OTRS | supersupport |

Fig. 7: Customer History Widget

## 5.2 Ticket List

The ticket list shows tickets based on the list's configuration. The visible columns and the filter configuration can be changed using the *Customize Organizer* menu item in the *Personalization* menu.



| ☐ | Number | Title | Priority | Changed | Sender |
|---|---|---|---|---|---|
| ☑ | 2020032510000409 | Re: subject alalal 1234 | 5 very high | 10 minutes ago | 871@example-service.com |
| ☑ | 2015071510123456 | Welcome to OTRS! | 3 normal | 23 minutes ago | OTRS Feedback |
| ☐ | 2020032510000374 | Good morning! | 3 normal | 6 days ago | 632@fast-company-example-sales.co |
| ☐ | **2020032510000383** | **What is the real questions?** | 3 normal | **16 days ago** | **787@fast-company-example-sales.c** |
| ☑ | **2020032510000427** | **Why am I here?** | 1 very low | **16 days ago** | **255@slow-company-example-servic** |
| ☑ | **2020032510000347** | **Why am I here?** | 2 low | **16 days ago** | **92@slow-company-example-sales.c** |
| ☐ | **2020032510000365** | **What a wonderful day!** | 4 high | **16 days ago** | **471@example-service.net** |
| ☐ | **2020032510000338** | **some subject alalal** | 5 very high | **22 days ago** | **929@example-sales.com** |
| ☐ | **2020032510000356** | **Why am I here?** | 3 normal | **22 days ago** | **614@slow-company-example-sales.** |
| ☐ | **2020032510000392** | **Re: RE: AW: subject with very long lines** | 1 very low | **22 days ago** | **308@company-service.com** |
| ☐ | **2020032510000418** | **No problem, everything is ok!** | 2 low | **22 days ago** | **400@slow-company-exampl** |

Fig. 8: Ticket List

If there are articles in a ticket that the agent did not read yet, the ticket is displayed with bold text in the ticket list and marked as unread. When an agent selects a ticket and reads all its articles, it will be marked as read and will be displayed with normal text in the ticket list.

Clicking on a ticket in the list opens the detail view of the ticket.

**See also:**

The general usage of a list is explained in the *Business Object List* section of the *Navigation And Usage* chapter.

### 5.2.1 Ticket List Actions

The ticket list supports some actions that can be performed on many tickets at the same time. To enable the bulk actions, the agent has to select at least one ticket in the list and click on the pen icon.

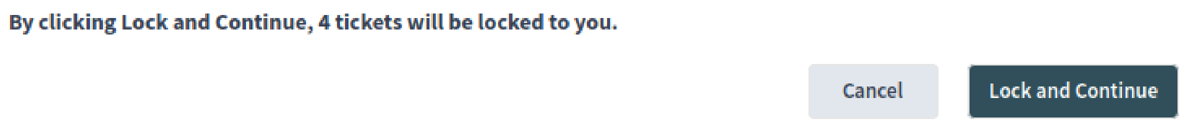
The eye icon allows agents to watch or unwatch tickets. With this function, an agent can subscribe or unsubscribe to information about the ticket's changes. An agent who is watching a ticket will be notified like the owner or the responsible of the ticket.

---

**Note:** The ticket watch feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

---

If the selected tickets are not locked to the agent, they will be automatically locked while performing the bulk action. This needs to be confirmed by clicking on the *Lock and Continue* button.



By clicking Lock and Continue, 4 tickets will be locked to you.

Cancel
Lock and Continue

Fig. 9: Lock and Continue

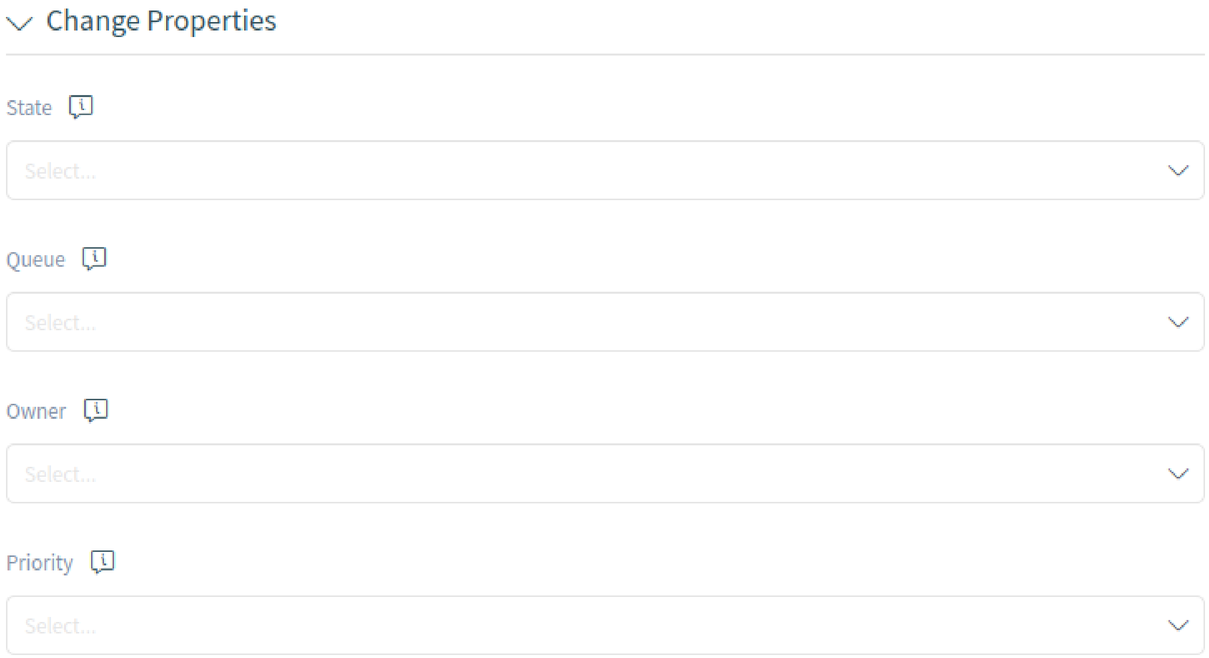
---

**Note:** If the agent does not have permissions to lock the selected tickets, a notification message will inform the agent about the tickets that cannot be locked. It is possible to continue with the bulk action, but the listed tickets will not be affected.

---

The following actions are available:

**Change Properties** This action allows agents to change the properties of the selected tickets.



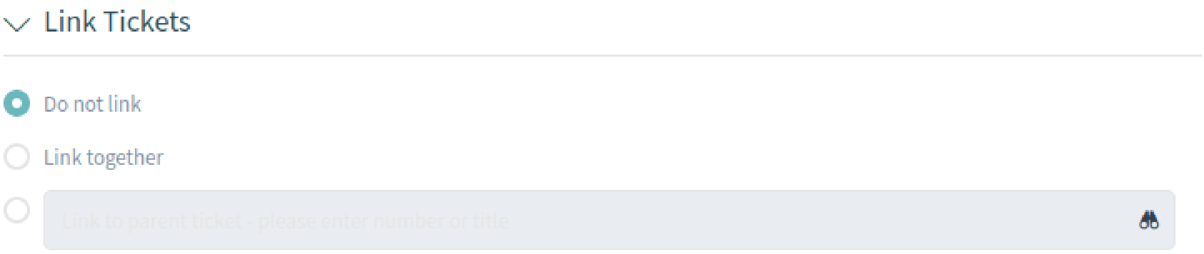
Change Properties
State
Select...
Queue
Select...
Owner
Select...
Priority
Select...

Fig. 10: Change Properties

The following properties can be changed:

- State
- Queue
- Owner
- Priority

**Link Tickets** This action allows to link the selected tickets together or with a parent ticket. The linked tickets will be displayed in the *Linked Tickets* widget of the ticket detail view.



Link Tickets

● Do not link

○ Link together

○ Link to parent ticket - please enter number or title

Fig. 11: Link Tickets

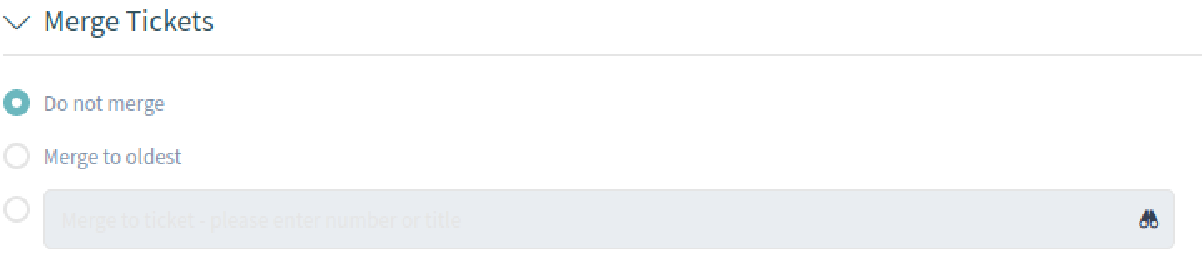
**Do not link** Select this option if the selected tickets should not be linked. This is selected by default.

**Link together** Select this option to link the selected tickets together.

**Search field** The search field allows the agent to search for another ticket. Using a wildcard * is supported. The selected tickets from the ticket list will be linked to the original ticket by the search field.

**Merge Tickets** This action allows agents to merge the selected tickets to the oldest one or to any other ticket.

**Warning:** The merge action can not be undone.



Merge Tickets

● Do not merge

○ Merge to oldest

○ Merge to ticket - please enter number or title

Fig. 12: Merge Tickets

**Do not merge** Select this option if the selected tickets should not be merged. This is selected by default.

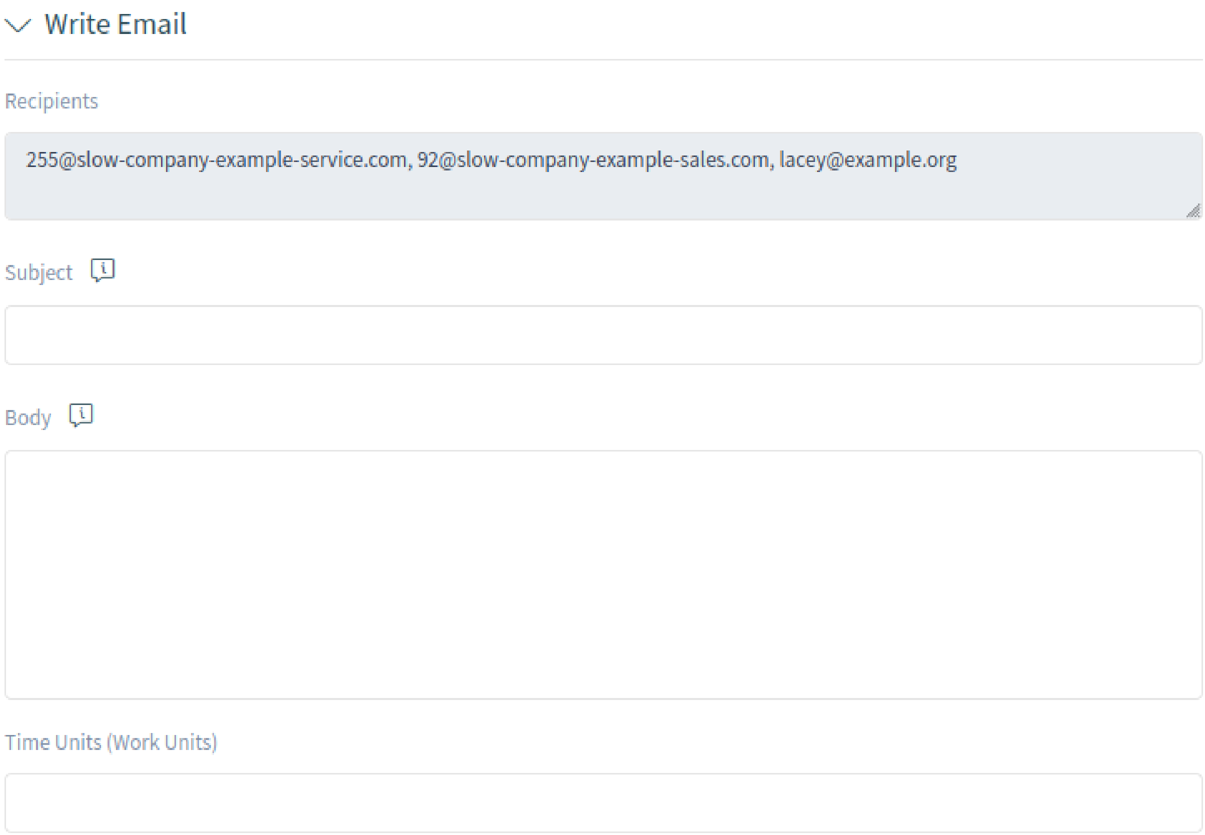
**Merge to oldest** Select this option to merge the selected tickets to the oldest one.

**Search field** The search field allows the agent to search for another ticket. Using a wildcard * is supported. The selected tickets from the ticket list will be merged to the original ticket by the search field.

**Write Email** This action allows agents to write an email message to customer users found in the selected tickets. The body of the email will be added to the selected tickets as an article.

**Recipients** This field is read-only and contains all recipients from the selected tickets.

**Subject** This text will be the subject for the emails to be sent and the subject of the article to be added to the selected tickets.



Write Email

Recipients

255@slow-company-example-service.com, 92@slow-company-example-sales.com, lacey@example.org

Subject
Body
Time Units (Work Units)

Fig. 13: Write Email

**Body** This text will be the body for the emails to be sent and the body of the article to be added to the selected tickets.

**Time Units** Enter any amount of time that is to be used in time accounting.

**Write Note** This action allows agents to write a note for the selected tickets. The body of the note will be added to the selected tickets as an article.

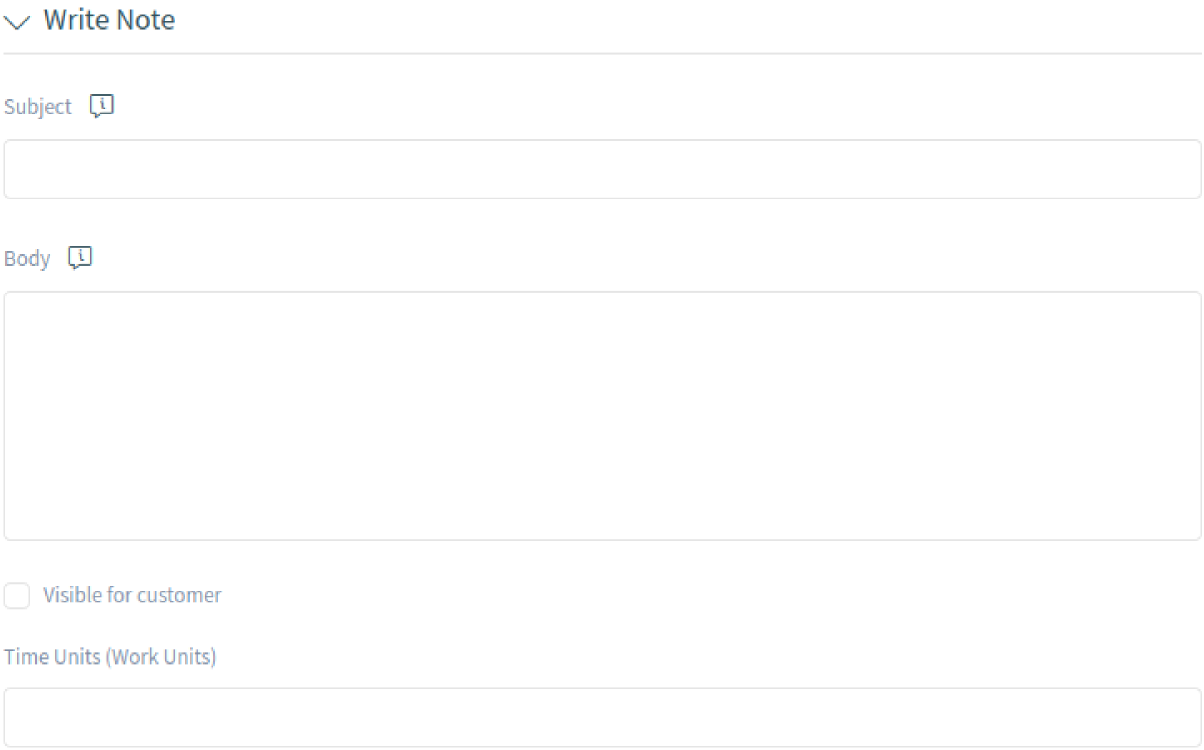


Fig. 14: Write Note

**Subject** This text will be the subject for the emails to be sent and the subject of the article to be added to the selected tickets.

**Body** This text will be the body for the emails to be sent and the body of the article to be added to the selected tickets.

**Visible to customer** If this checkbox is checked, the note will be visible to customer users in the external interface.

**Time Units** Enter any amount of time that is to be used in time accounting.

Click on the *Execute Bulk Action* button to perform the selected action. After executing the bulk action, the selected tickets are automatically unlocked. To prevent this, unselect the checkbox *Unlock after bulk execute*. In this case, the affected tickets remain locked.

## 5.3 Ticket Detail View

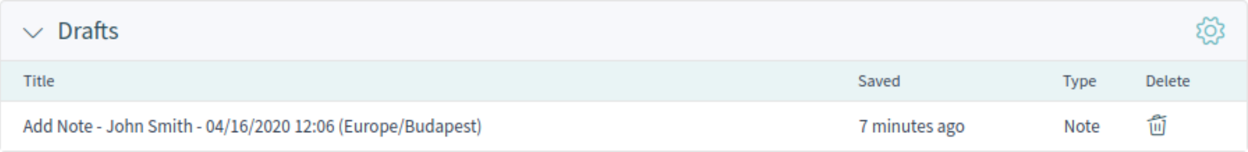
Use this screen to see the details of a ticket. The ticket detail view is available if you select a ticket from a ticket list.

### 5.3.1 Ticket Detail View Widgets

Like other business object detail views, the ticket detail view is also highly customizable. Some of the following widgets are displayed with the default installation, but others have to be added in the screen configuration.

**Drafts Widget** This widget shows the new articles that have been saved for later work. This widget is displayed only when at least one draft has been saved.

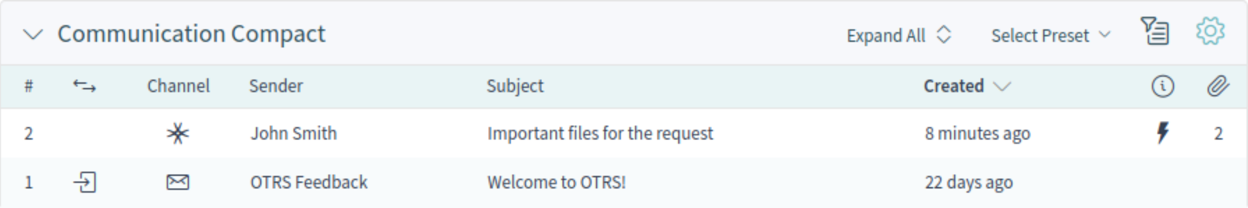
Clicking on an item in the list opens the draft to continue editing it.



| Title | Saved | Type | Delete |
|---|---|---|---|
| Add Note - John Smith - 04/16/2020 12:06 (Europe/Budapest) | 7 minutes ago | Note | 🗑 |

Fig. 15: Drafts Widget

**Communication Compact Widget** This widget shows all articles of the ticket in a table view. There is an *Expand All* or *Collapse All* button in the header to expand or collapse the content of the widget.



| # | ⇆ | Channel | Sender | Subject | Created | ⓘ | 📎 |
|---|---|---|---|---|---|---|---|
| 2 | | ✳ | John Smith | Important files for the request | 8 minutes ago | ⚡ | 2 |
| 1 | ⇥ | ✉ | OTRS Feedback | Welcome to OTRS! | 22 days ago | | |

Fig. 16: Communication Compact Widget

The column with the arrows informs about the direction of the article. Articles can be incoming or outgoing messages, as well as internal messages.

Articles in the communication of a ticket can come from different channels. The column *Channel* informs about the channel of the according article.

The column with the information icon shows additional article information, for example if the article is marked as important.

The last column indicates whether the article has attachments or not.

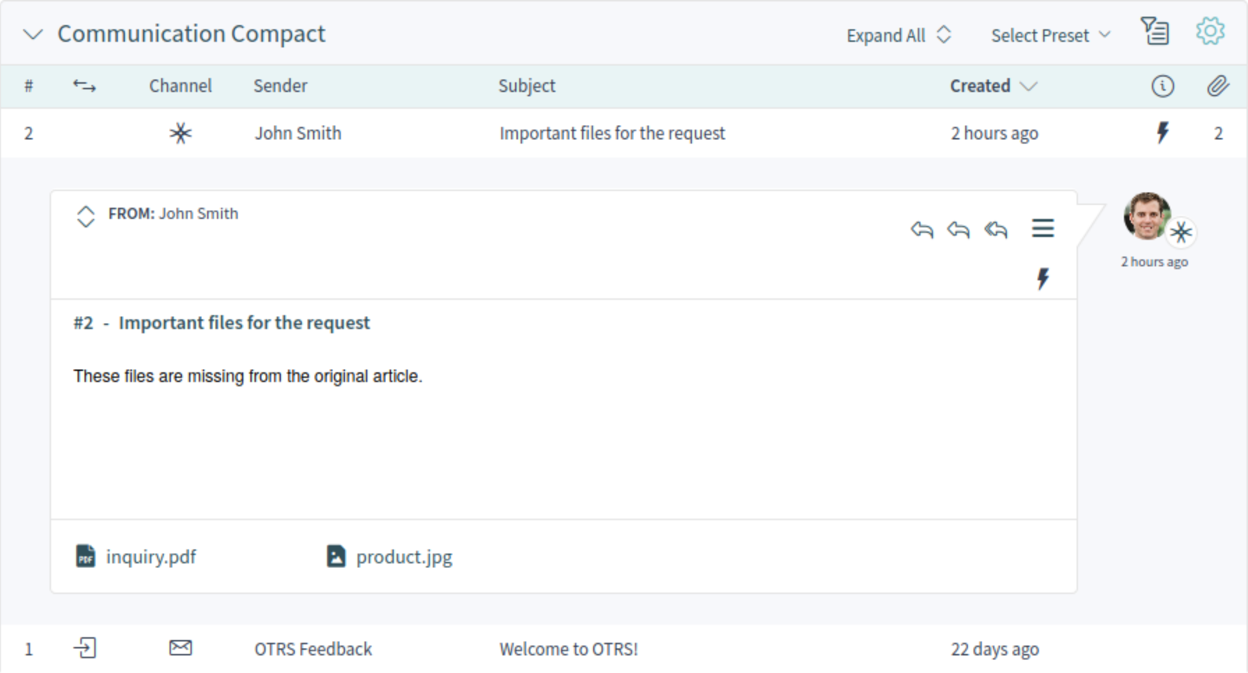
Clicking on an article will display the detail view of *Articles*. Unread articles are displayed with bold text. Clicking on the *Expand all* button at the top of the widget expands all articles and marks all articles as read.

**Communication Stream Widget** This widget shows the articles of a ticket in a different format than in the widget *Communication Compact*. The articles are displayed as symbolic speech bubbles next to the authors' avatar images with the title and first few lines of the article.

The article direction is represented by the avatars of each side. Avatars on the left side represent the incoming articles, and avatars on the right side represent the outgoing articles. The icons near the avatars represent the channel through which the article was sent.

Clicking on an article will display the detail view of *Articles*. Unread articles are displayed with bold text. Clicking on the *Expand all* button at the top of the widget expands all articles and marks all articles as read.

**Properties Widget** This widget shows the properties of the ticket. The properties are presented as small cards within the widget.


Communication Compact
Expand All
Select Preset

| # | | Channel | Sender | Subject | Created | | |
|---|---|---|---|---|---|---|---|
| 2 | | ✳ | John Smith | Important files for the request | 2 hours ago | ⚡ | 2 |
| 1 | | ✉ | OTRS Feedback | Welcome to OTRS! | 22 days ago | | |

**FROM:** John Smith

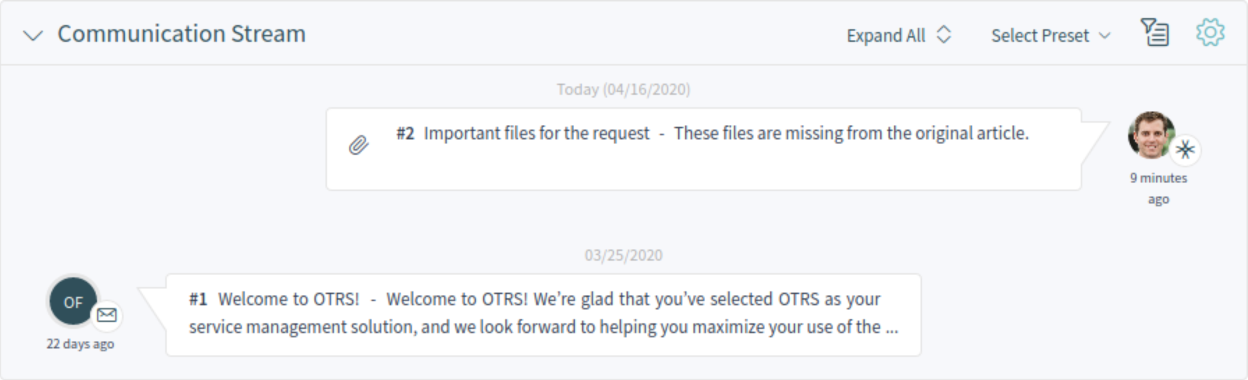
2 hours ago

**#2 - Important files for the request**

These files are missing from the original article.

inquiry.pdf
product.jpg

Fig. 17: Expanded Communication Compact Widget


Communication Stream
Expand All
Select Preset
OF

Today (04/16/2020)

#2 Important files for the request - These files are missing from the original article.

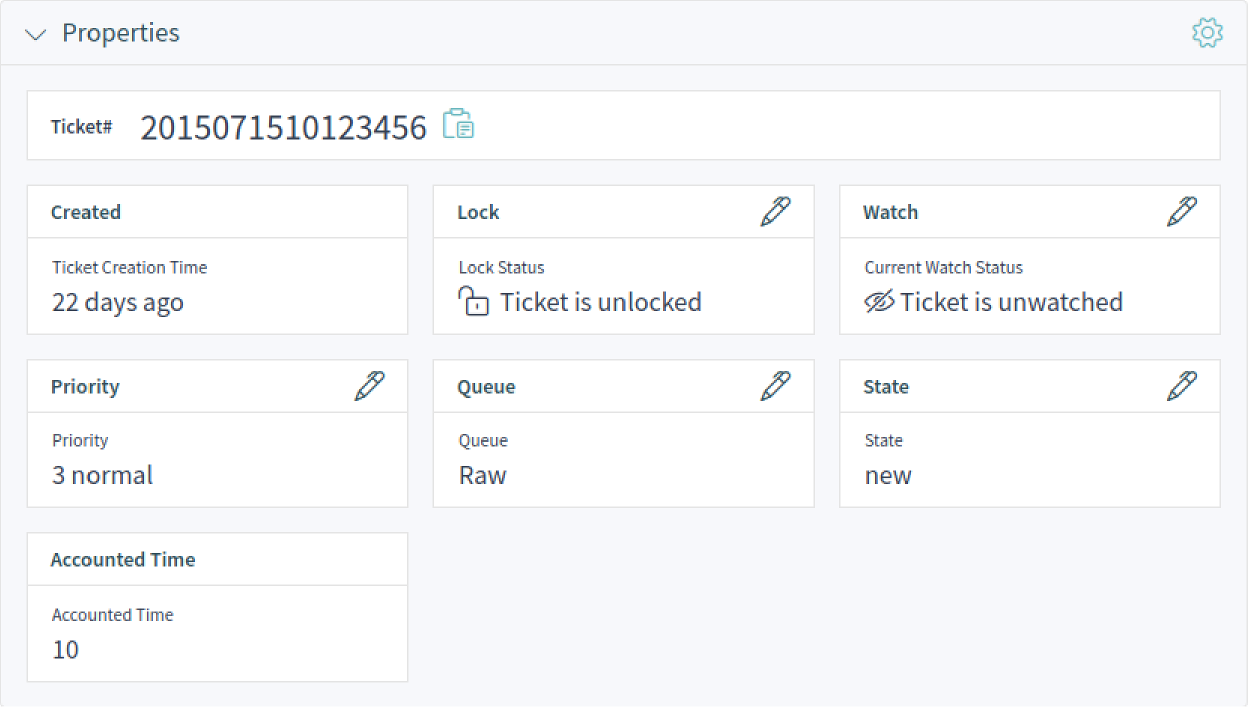
9 minutes ago

03/25/2020

#1 Welcome to OTRS! - Welcome to OTRS! We're glad that you've selected OTRS as your service management solution, and we look forward to helping you maximize your use of the ...

22 days ago

Fig. 18: Communication Stream Widget



Properties

Ticket# 2015071510123456

Created
Ticket Creation Time
22 days ago

Lock
Lock Status
Ticket is unlocked

Watch
Current Watch Status
Ticket is unwatched

Priority
Priority
3 normal

Queue
Queue
Raw

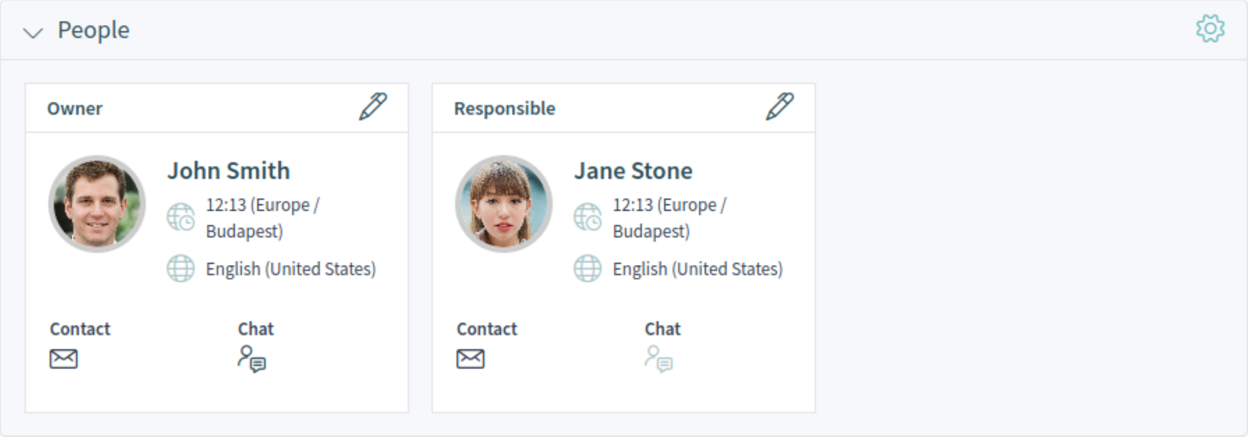
State
State
new

Accounted Time
Accounted Time
10

Fig. 19: Properties Widget

Most of the cards have a pen icon in the right corner. Clicking on this icon allows the user to directly edit the property.

**People Widget** This widget can be used to display user cards of the people who created the ticket or who are set as owner or responsible for it.



People

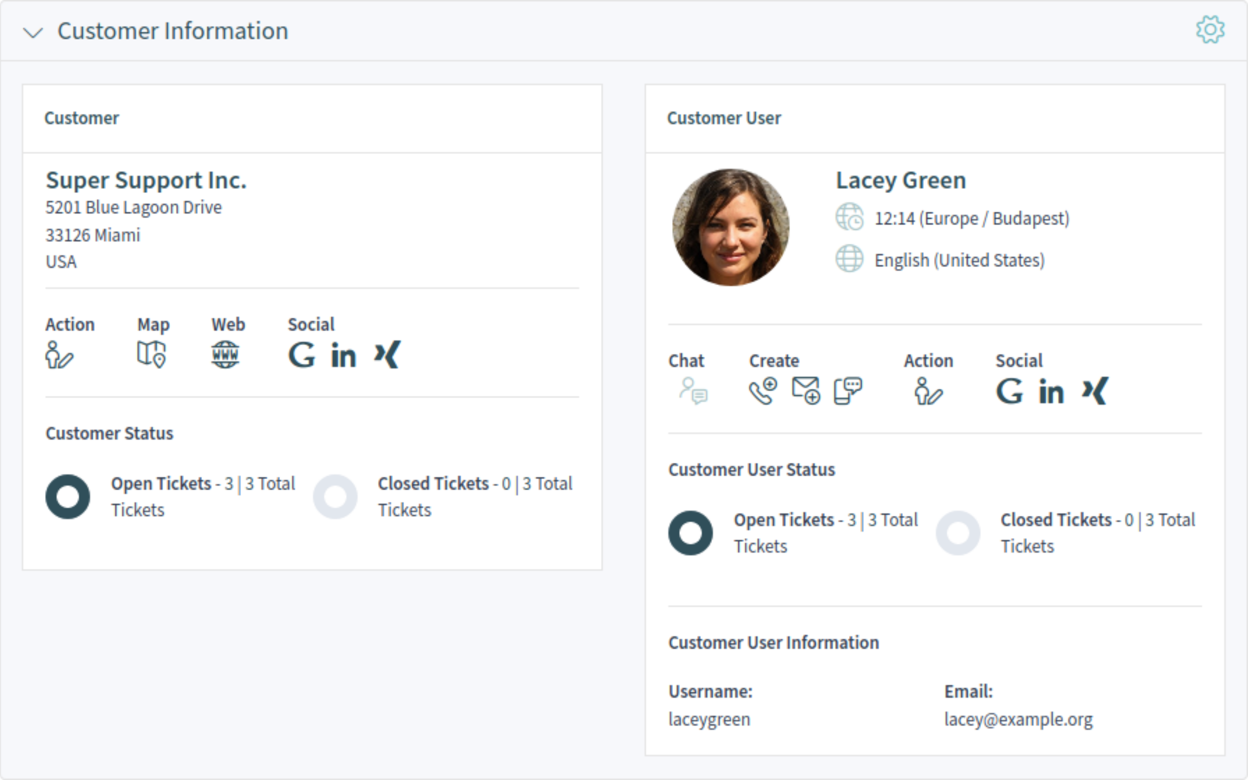
Owner
John Smith
12:13 (Europe / Budapest)
English (United States)
Contact
Chat

Responsible
Jane Stone
12:13 (Europe / Budapest)
English (United States)
Contact
Chat

Fig. 20: People Widget

**Customer Information Widget** This widget shows information about the customer and the customer user of the ticket.

The cards show the number of open and closed tickets. From the *Action* section, it is possible to edit the customer or the customer user. The *Social* section contains links to some social media pages or search engines that are related to the customer user or the customer. Using the icons in the *Create*



Super Support Inc.
5201 Blue Lagoon Drive
33126 Miami
USA

Customer Status

Open Tickets - 3 | 3 Total Tickets

Closed Tickets - 0 | 3 Total Tickets

Lacey Green
12:14 (Europe / Budapest)
English (United States)

Customer User Status

Open Tickets - 3 | 3 Total Tickets

Closed Tickets - 0 | 3 Total Tickets

Customer User Information

Username: laceygreen

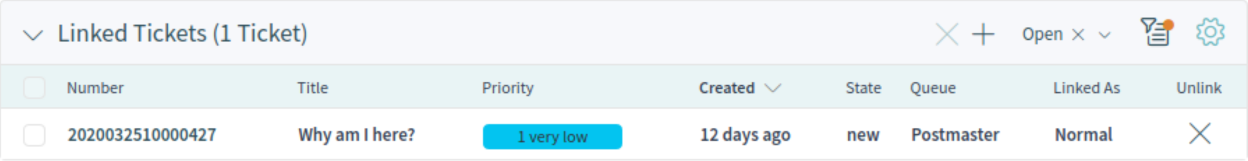
Email: lacey@example.org

Fig. 21: Customer Information Widget

section, it is possible to create any type of ticket. If the customer user is online, the agent can start a chat with the customer user.

For unknown customers, only a *Show All Tickets* button is displayed in this widget.

**Linked Tickets Widget** This widget shows the linked tickets, but the widget is only displayed when at least one ticket is linked to this business object. New links can be added with the *Link Objects* action. Existing links can also be managed there.



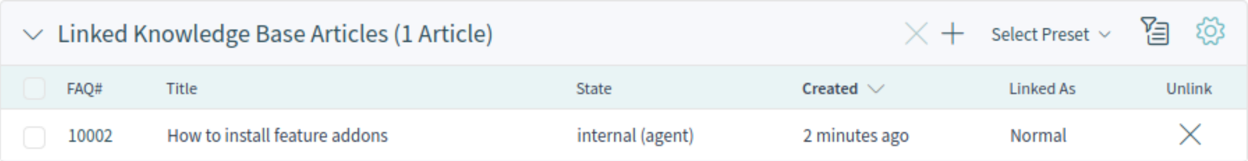
| ☐ | Number | Title | Priority | Created | State | Queue | Linked As | Unlink |
|---|---|---|---|---|---|---|---|---|
| ☐ | 2020032510000427 | Why am I here? | 1 very low | 12 days ago | new | Postmaster | Normal | ✕ |

Fig. 22: Linked Tickets Widget

**Linked Knowledge Base Articles Widget** This widget shows the linked knowledge base articles, but the widget is only displayed when at least one knowledge base article is linked to this business object. New links can be added with the *Link Objects* action. Existing links can also be managed there.

**Linked Appointments Widget** This widget shows the linked appointments, but the widget is only displayed when at least one appointment is linked to this business object. New links can be added with the *Link Objects* action. Existing links can also be managed there.

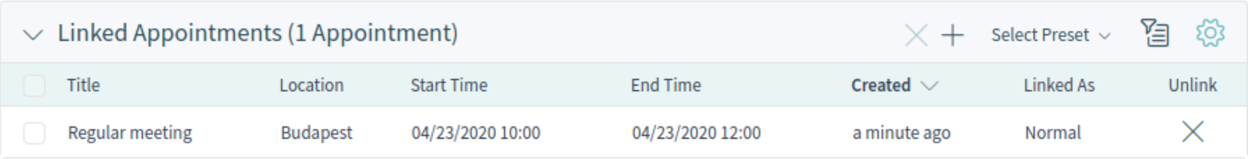
**Attachments Widget** This widget can be used to display attachments to the articles. The attachments can be downloaded and, for the images, a preview function is supported.



Linked Knowledge Base Articles (1 Article)

| FAQ# | Title | State | Created | Linked As | Unlink |
|---|---|---|---|---|---|
| 10002 | How to install feature addons | internal (agent) | 2 minutes ago | Normal | ✕ |

Fig. 23: Linked Knowledge Base Articles Widget



Linked Appointments (1 Appointment)

| Title | Location | Start Time | End Time | Created | Linked As | Unlink |
|---|---|---|---|---|---|---|
| Regular meeting | Budapest | 04/23/2020 10:00 | 04/23/2020 12:00 | a minute ago | Normal | ✕ |

Fig. 24: Linked Appointments Widget

### 5.3.2 Ticket Detail View Actions

The following actions are available in the ticket detail view.

**Communication** This column groups the following actions together:

**Add Note** This action allows agents to create a note for ticket and to add the note as article to the ticket. Notes are only visible to agents by default.

**Add Phone Call Outbound** This action allows agents to add a note about an outgoing phone call to the ticket.

**Add Phone Call Inbound** This action allows agents to add a note about an incoming phone call to the ticket.

**Send Email Outbound** This action allows agents to send an email and to add the email as an article to the ticket. This screen is very similar to an email client screen.

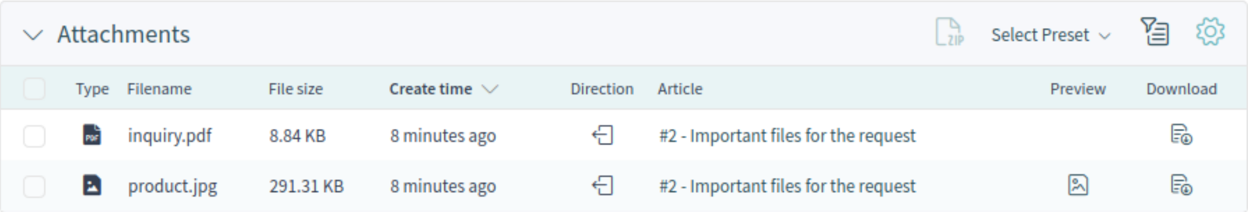
**Send SMS Outbound** This action allows agents to send an SMS message and to add the SMS content as an article to the ticket.

**Note:** Additional contract is needed to use this action.

**Organization** This column groups the following actions together:

**Lock Ticket or Unlock Ticket** This action allows agents to lock or unlock the ticket. If an agent locks the ticket, the agent will be the owner of the ticket.

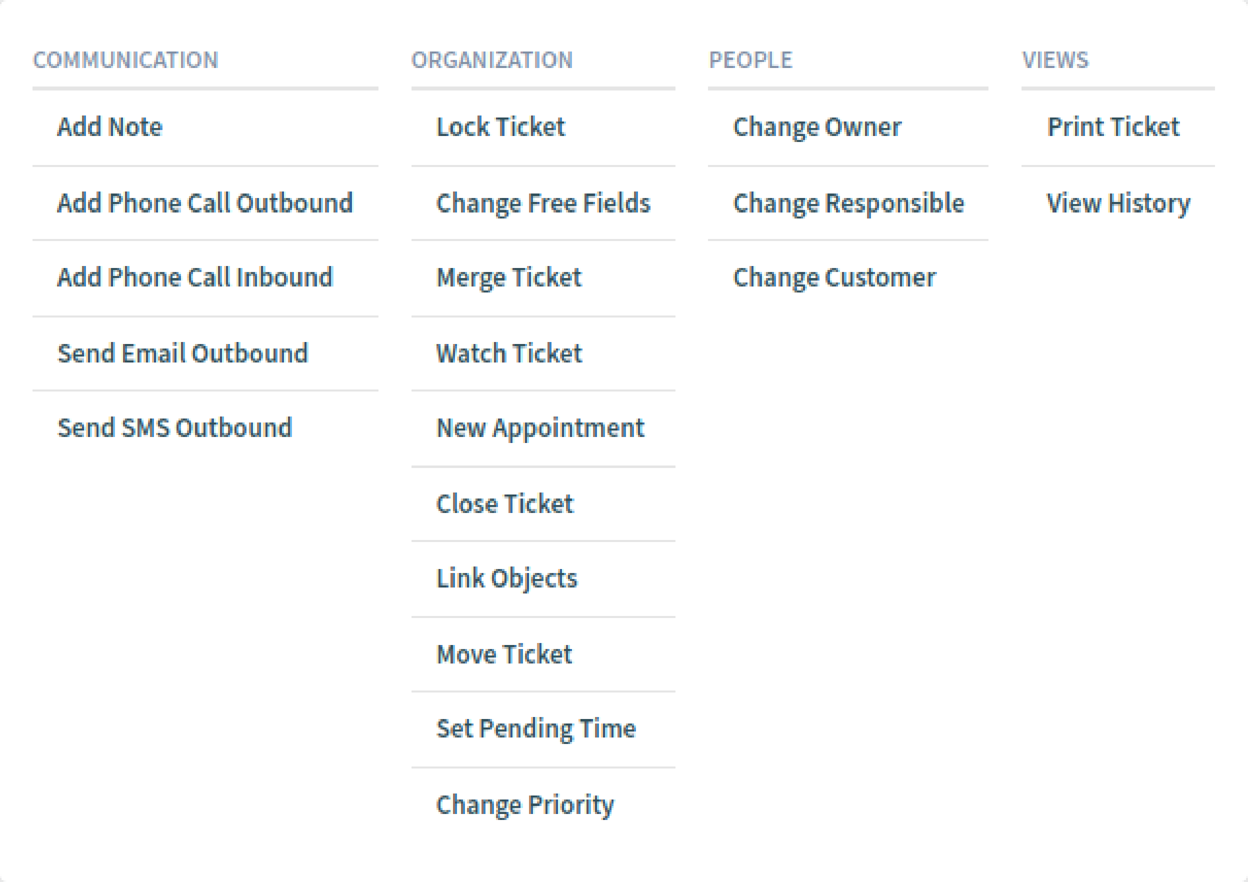
**Change Free Fields** This action allows agents to change the free fields of ticket, for example the title of the ticket.



Attachments

| Type | Filename | File size | Create time | Direction | Article | Preview | Download |
|---|---|---|---|---|---|---|---|
| | inquiry.pdf | 8.84 KB | 8 minutes ago | | #2 - Important files for the request | | |
| | product.jpg | 291.31 KB | 8 minutes ago | | #2 - Important files for the request | | |

Fig. 25: Attachments Widget



| COMMUNICATION | ORGANIZATION | PEOPLE | VIEWS |
|---|---|---|---|
| Add Note | Lock Ticket | Change Owner | Print Ticket |
| Add Phone Call Outbound | Change Free Fields | Change Responsible | View History |
| Add Phone Call Inbound | Merge Ticket | Change Customer | |
| Send Email Outbound | Watch Ticket | | |
| Send SMS Outbound | New Appointment | | |
| | Close Ticket | | |
| | Link Objects | | |
| | Move Ticket | | |
| | Set Pending Time | | |
| | Change Priority | | |

Fig. 26: Ticket Detail View Actions

**Merge Ticket** This action allows agents to merge one ticket with another ticket.

> **Warning:** The merge action cannot be undone.

**Watch Ticket or Unwatch Ticket** This action allows agents to subscribe or unsubscribe to notifications about the ticket' s changes. An agent who is watching a ticket will be notified in the same way as the owner or the responsible of the ticket.

> **Note:** The ticket watcher feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

**New Appointment** This action allows agents to create an appointment related to the ticket. The new appointment will be linked to the ticket and will be visible in the *Calendar Overview*.

**Close Ticket** This action allows agents to close the ticket.

**Delete Ticket** This action allows agents to delete the ticket.

> **Note:** The delete ticket action is not enabled by default. It needs to first be activated by an administrator in order to use it.

**Link Objects** This action allows agents to link other business objects to the ticket.

**Move Ticket** This action allows agents to change the queue of the ticket. Queues are like folders for tickets. A ticket can belong to only one queue at a time.

**Set Pending Time** This action allows agents to set the pending time of the ticket.

**Change Priority** This action allows agents to change the priority of the ticket.

**Mark as Junk** This action allows agents to mark the ticket as junk or spam.

> **Note:** The mark as junk action is not enabled by default. It needs to first be activated by an administrator in order to use it.

**External Link** This feature provides an easy way to display external links in the ticket action menu.

> **Note:** The external link feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

**People** This column groups the following actions together:

**Change Owner** This action allows agents to change the owner of the ticket.

**Change Responsible** This action allows agents to set or change the responsible of the ticket.

> **Note:** The responsible feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

**Change Customer** This action allows agents to change the customer and the customer user of the ticket.

**Views** This column groups the following actions together:

- **Print Ticket** This action allows agents to print the ticket to a PDF file and to download it.
- **View History** This action allows agents to view the history of the ticket. The history contains all operations that happened with the ticket in the past, along with timestamp and username of the person who took the action.

### 5.3.3 Sidebar

The sidebar gives a quick overview about what agents are involved in the ticket: who is the ticket's owner, who is the ticket's responsible, and which agents are watching the ticket.

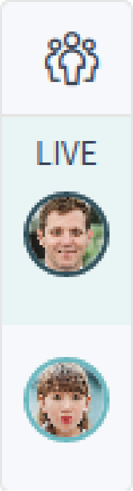


Fig. 27: Sidebar

Involved agents are indicated with a pen icon when hovering the mouse over the sidebar. This means that the agent has performed some actions on the ticket, for example changed the properties or added articles.

The agents who are watching the ticket are indicated with an eye icon when hovering the mouse over the sidebar.

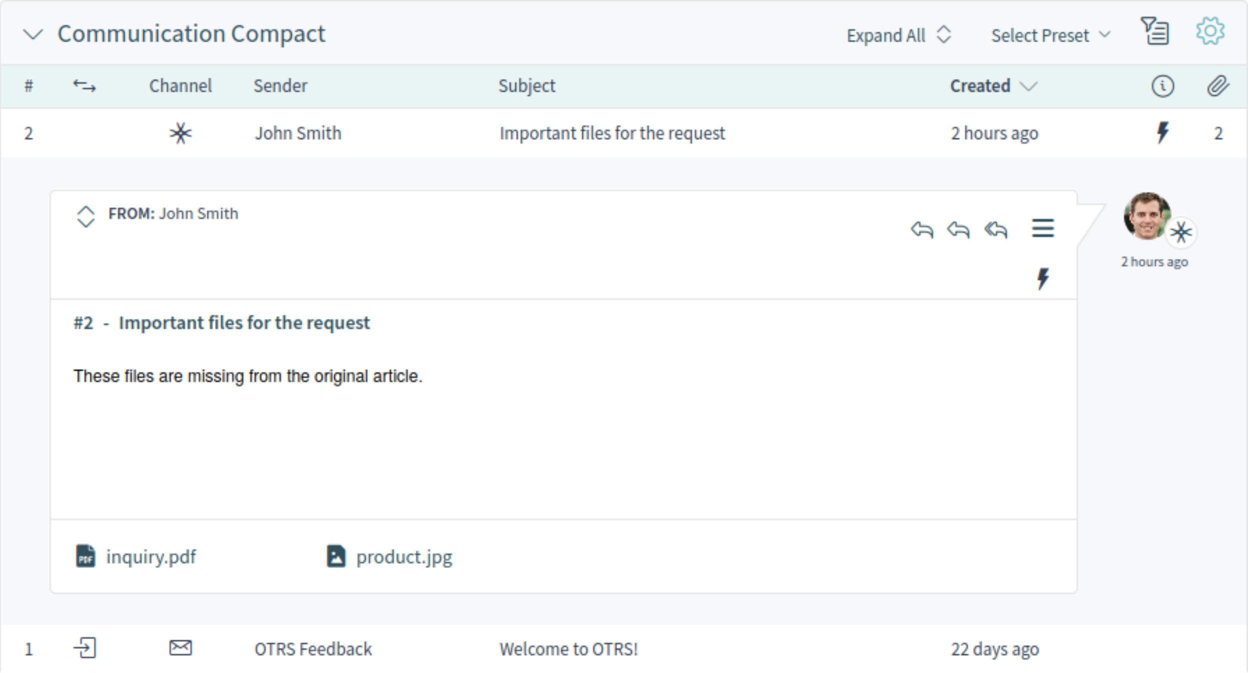
The dark green border around the avatar image means that the agent is the owner of the ticket, while the responsible agent has a light green border around the avatar image.

## CHAPTER 6

# Articles

Articles are the entries in a ticket. All communications within a ticket produce a new article.

Use the article detail view to work with articles. The article detail view is available from the *Communication Compact* or from the *Communication Stream* widgets of the ticket detail view when an article is expanded.



| # | ⇆ | Channel | Sender | Subject | Created | ⓘ | 📎 |
|---|---|---|---|---|---|---|---|
| 2 | | ✳ | John Smith | Important files for the request | 2 hours ago | ⚡ | 2 |
| 1 | ⇥ | ✉ | OTRS Feedback | Welcome to OTRS! | 22 days ago | | |

**FROM:** John Smith

2 hours ago

**#2 - Important files for the request**

These files are missing from the original article.

inquiry.pdf

product.jpg

Fig. 1: Expanded Communication Compact Widget

## 6.1 Article Detail View Actions

The following actions are available in the article detail view.

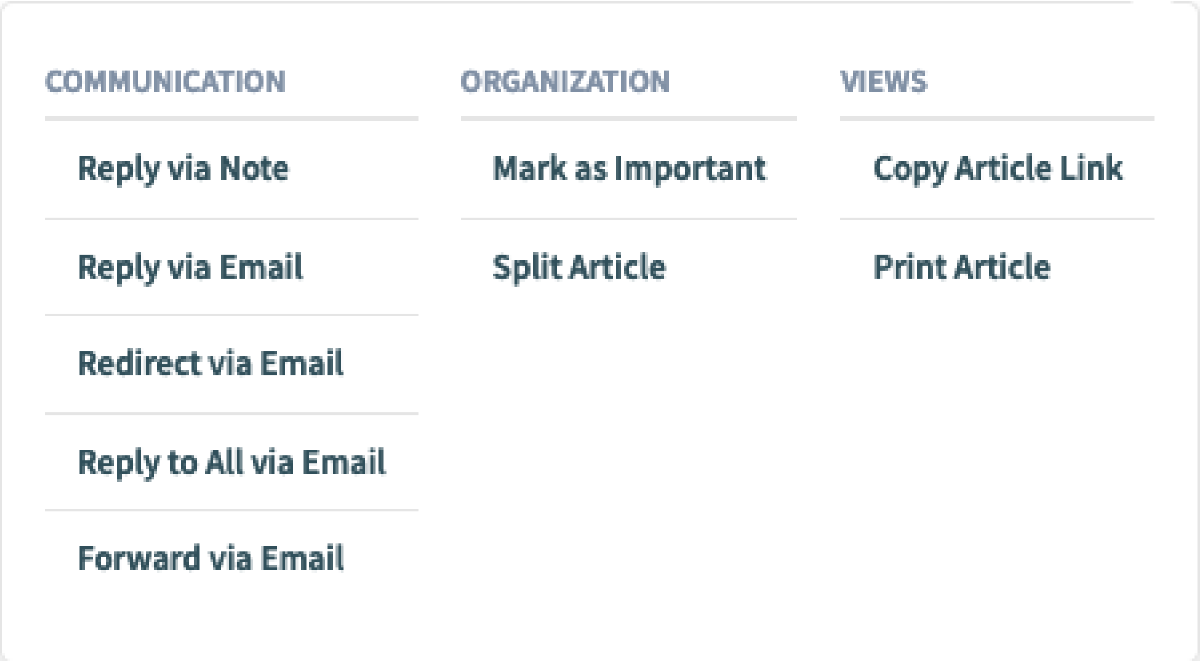

COMMUNICATION
Reply via Note
Reply via Email
Redirect via Email
Reply to All via Email
Forward via Email
ORGANIZATION
Mark as Important
Split Article
VIEWS
Copy Article Link
Print Article

Fig. 2: Article Detail View Actions

**Communication** This column groups the following actions together:

**Reply via Note** This action allows you to reply to an article if the original article is a note. The reply via note screen is very similar to the add note screen.

**Reply via Email** This action allows you to reply via email to the article. The reply via email screen is very similar to an email client screen.

**Redirect via Email** This action allows you to redirect the article as an email. The new recipient will receive the email like it was sent to them originally. It is possible to inform the original sender about the redirection.

**Reply to All via Email** This action allows you to send an article reply via email to all recipients at one time. The reply to all via email screen is very similar to an email client screen.

**Forward via Email** This action allows you to forward the article as an email. The forward via email screen is very similar to an email client screen.

**Reply via SMS** This action allows you to reply to an article via SMS message. It is possible to send the SMS as a flash message so that it displays directly on the target mobile device without user interaction (depends on the used device and provider).

**Note:** Additional contract is needed to use this action.

**Organization** This column groups the following actions together:

**Mark as Important or Unmark as Important** This action allows you to mark or unmark the article as important. Articles marked as important have a lightning icon in the header.

**Split Article** This action allows you to split the article into an other ticket. The agent can split the article to a phone, email or process ticket.

**Views** This column groups the following actions together:

**Print Article** This action allows you to print the article to a PDF file and download it.

**Copy Article Link** This action allows you to copy the individual article’s link to the clipboard.

**Plain View** This action allows you to view the raw source of the email article.

# CHAPTER 7

# Knowledge Base Articles

Knowledge base articles contain answers to frequently asked questions, or they contain common knowledge.

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

## 7.1 Create Knowledge Base Article

Use this screen to add new knowledge base articles to the system. The knowledge base article create screen is available from the main menu and from the action menu.

The following settings are available when adding a knowledge base article. The fields marked with an asterisk are mandatory.

**Properties** In this section, the following options can be set.

**Title *** The name of the knowledge base article. Any type of characters can be entered into this field, including uppercase letters and spaces. The name will be displayed in the overview table.

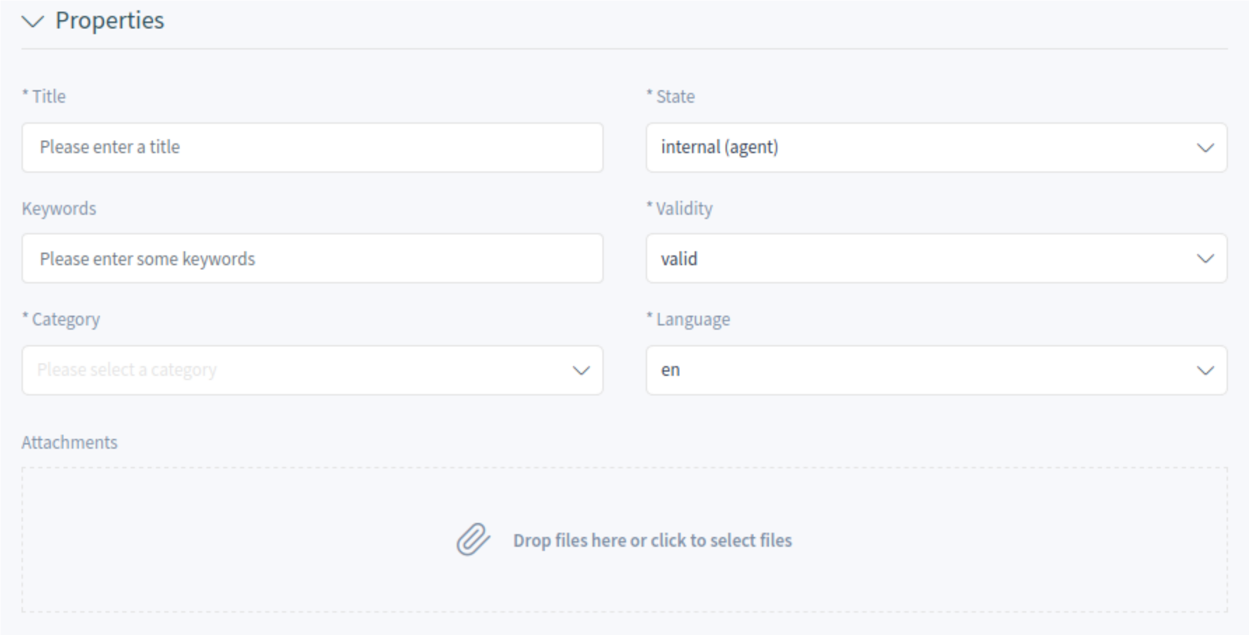
**Keywords** Add some keywords to make it easier to find the knowledge base article.

**Category *** Select a category from the available categories.

**State *** Select the state of the knowledge base article. Possible options are:

- *External (customer)*: The knowledge base article is visible to agents and customer users who are logged into the external interface.
- *Internal (agent)*: The knowledge base article is visible to agents only.
- *Public (all)*: The knowledge base article is visible to anyone via the external interface.

**Validity *** Set the validity of this knowledge base article. Knowledge base articles can only be used in **OTRS** if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the knowledge base article.



Properties
* Title
Please enter a title
* State
internal (agent)
Keywords
Please enter some keywords
* Validity
valid
* Category
Please select a category
* Language
en
Attachments
Drop files here or click to select files

Fig. 1: Create Knowledge Base Article

**Language *** Select a language from the available languages.

**Attachments** It is possible to add attachments to the knowledge base article. Click on the field to add an attachment or just drop some files here.

**Symptom (public)** Add a description that explains the current situation here.

**Problem (public)** More detailed description about the situation.

**Solution (public)** Explain how to solve the problem, or share a workaround for solving it.

**Comment (internal)** Internal text about the current knowledge base article for agents only.

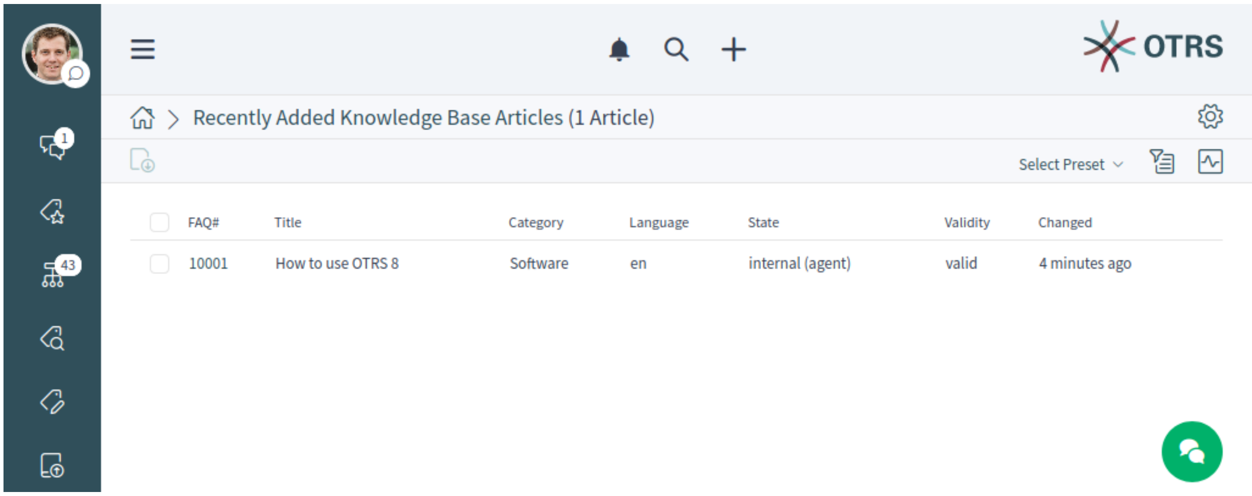
## 7.2 Knowledge Base Article List

Use this screen to browse through the knowledge base articles. The knowledge base article list is available from the organizer sidebar.

The items in the list can be exported. Clicking on an item in the list opens the detail view of the knowledge base article.

## 7.3 Knowledge Base Article Detail View

Use this screen to see the details of a knowledge base article. The knowledge base article detail view is available when you select a knowledge base article from a knowledge base article list.



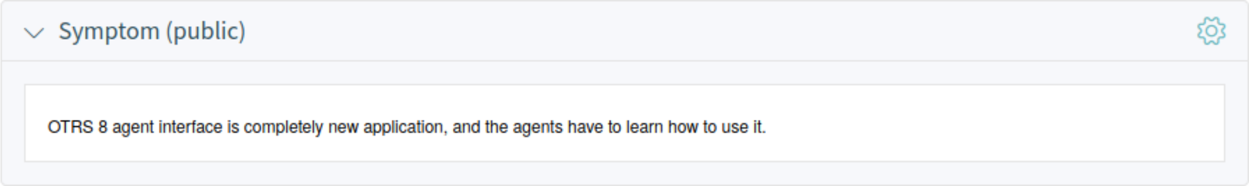
|  | FAQ# | Title | Category | Language | State | Validity | Changed |
|---|---|---|---|---|---|---|---|
| ☐ | 10001 | How to use OTRS 8 | Software | en | internal (agent) | valid | 4 minutes ago |

Fig. 2: Knowledge Base Article List

### 7.3.1 Knowledge Base Article Detail View Widgets

Like other business object detail views, the knowledge base article detail view is also highly customizable. Some of the following widgets are displayed with the default installation, but others have to be added in the screen configuration.

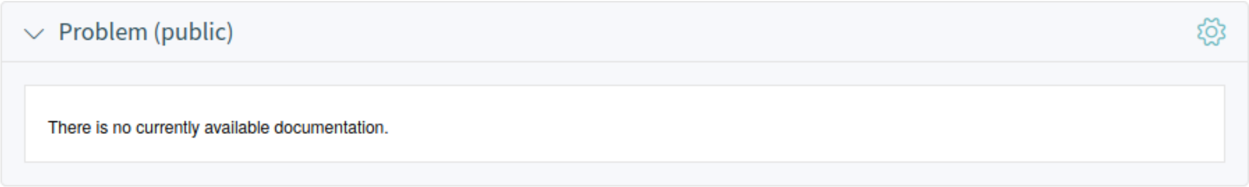
**Symptom Widget** This widget can be used to describe the symptom of a problem.



OTRS 8 agent interface is completely new application, and the agents have to learn how to use it.

Fig. 3: Symptom Widget

**Problem Widget** This widget can be used to describe the problem itself.



There is no currently available documentation.

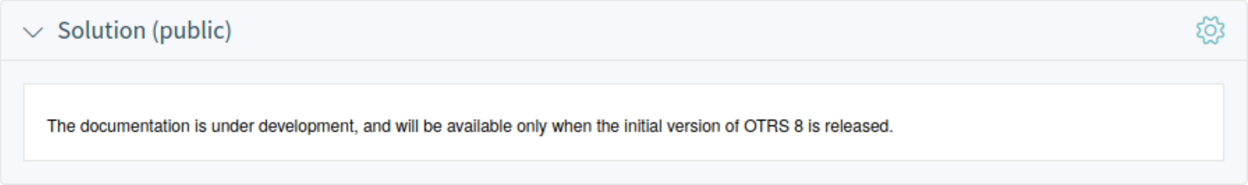
Fig. 4: Problem Widget

**Solution Widget** This widget can be used to describe the solution of the problem.

**Properties Widget** This widget shows the properties of the knowledge base article. The properties are presented as small cards within the widget.

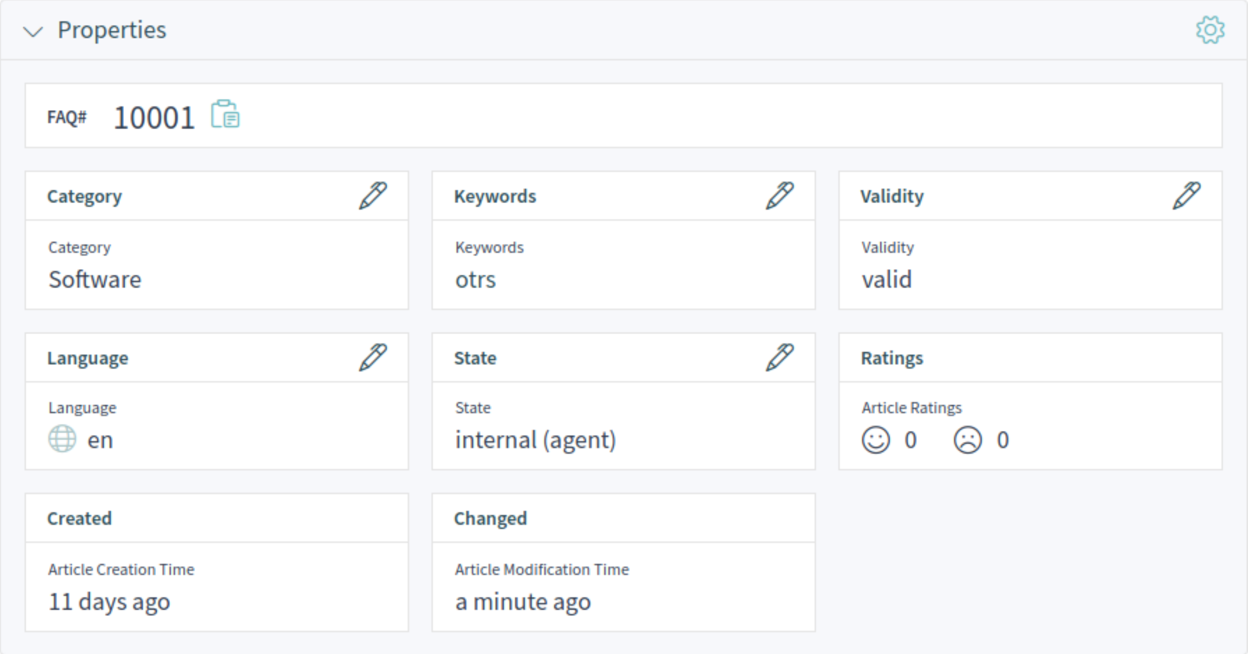
Most of the cards have a pen icon in the top right corner. Clicking on this icon allows you to directly edit the property.

**Attachments Widget** This widget can be used to display the attachments of the knowledge base article. The attachments can be managed with the *Edit* action.



The documentation is under development, and will be available only when the initial version of OTRS 8 is released.

Fig. 5: Solution Widget



FAQ# 10001

Category
Category: Software

Keywords
Keywords: otrs

Validity
Validity: valid

Language
Language: en

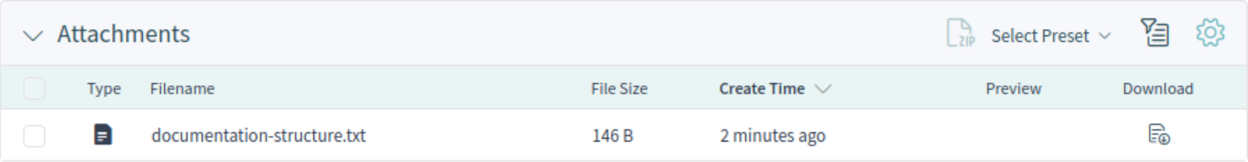
State
State: internal (agent)

Ratings
Article Ratings: ☺ 0 ☹ 0

Created
Article Creation Time: 11 days ago

Changed
Article Modification Time: a minute ago

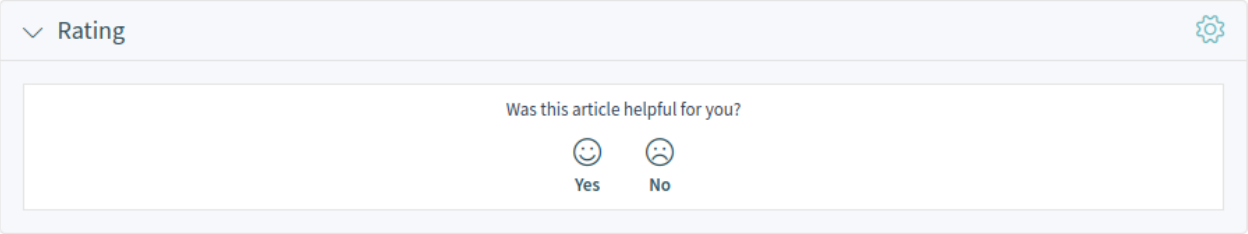
Fig. 6: Properties Widget



| ☐ | Type | Filename | File Size | Create Time | Preview | Download |
|---|---|---|---|---|---|---|
| ☐ | | documentation-structure.txt | 146 B | 2 minutes ago | | |

Fig. 7: Attachments Widget

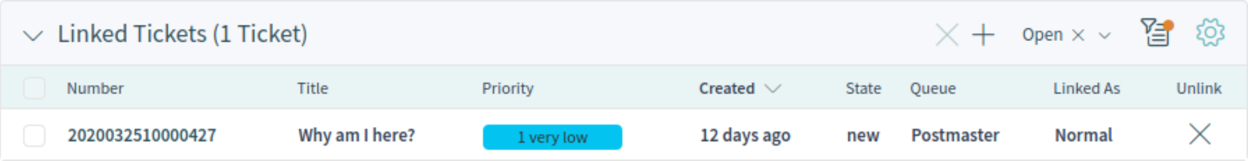
**Rating Widget** This widget can be used to rate the knowledge base article. To rate the knowledge base article, click on the *Yes* or *No* face in this widget.



Was this article helpful for you?

Fig. 8: Rating Widget

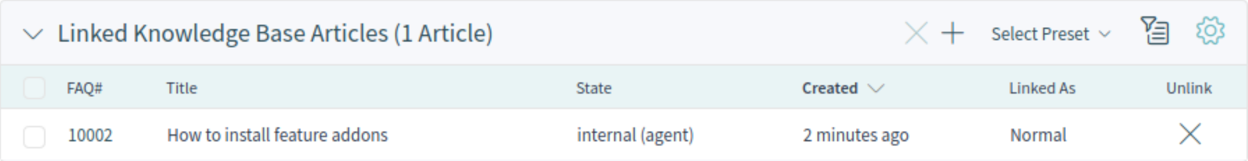
**Linked Tickets Widget** This widget shows tickets that are linked to the knowledge base article. The widget is only displayed when at least one ticket is linked to this business object. New links can be added with the *Link Objects* action. Existing links can also be managed here.



| ☐ | Number | Title | Priority | Created | State | Queue | Linked As | Unlink |
|---|---|---|---|---|---|---|---|---|
| ☐ | 2020032510000427 | Why am I here? | 1 very low | 12 days ago | new | Postmaster | Normal | × |

Fig. 9: Linked Tickets Widget

**Linked Knowledge Base Articles Widget** This widget shows other knowledge base articles that are linked to the knowledge base article being viewed. The widget is only displayed when at least one knowledge base article is linked to this business object. New links can be added with the *Link Objects* action. Existing links can also be managed here.



| ☐ | FAQ# | Title | State | Created | Linked As | Unlink |
|---|---|---|---|---|---|---|
| ☐ | 10002 | How to install feature addons | internal (agent) | 2 minutes ago | Normal | × |

Fig. 10: Linked Knowledge Base Articles Widget

**Linked Appointments Widget** This widget shows appointments that are linked to the knowledge base article. The widget is only displayed when at least one appointment is linked to this business object. New links can be added with the *Link Objects* action. Existing links can also be managed here.

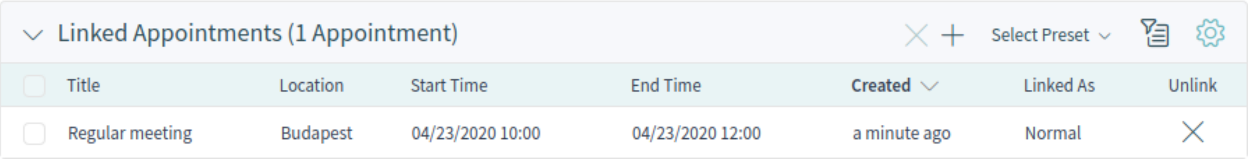
**Comment (internal) Widget** This widget can be used to add a comment to the article. The comment is not shown in the external interface.

**People Widget** This widget can be used to display user cards of the people who created and last changed the knowledge base article.

### 7.3.2 Knowledge Base Article Detail View Actions

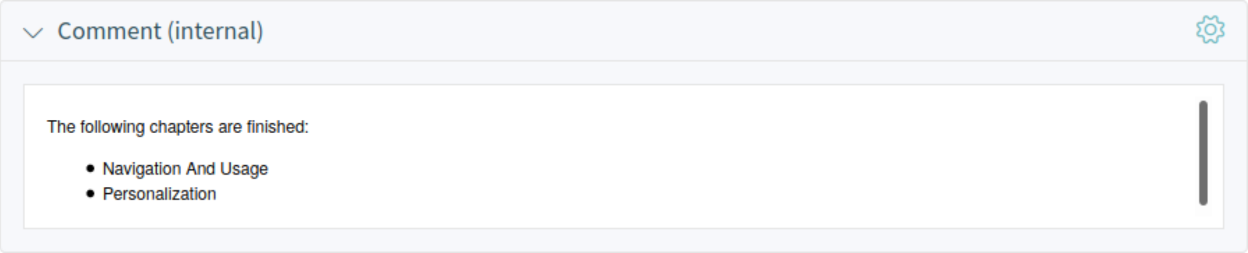
The following actions are available in the knowledge base article detail view.

**Organization** This column groups the following actions together:


Linked Appointments (1 Appointment)
Select Preset

| ☐ | Title | Location | Start Time | End Time | Created | Linked As | Unlink |
|---|---|---|---|---|---|---|---|
| ☐ | Regular meeting | Budapest | 04/23/2020 10:00 | 04/23/2020 12:00 | a minute ago | Normal | ✕ |

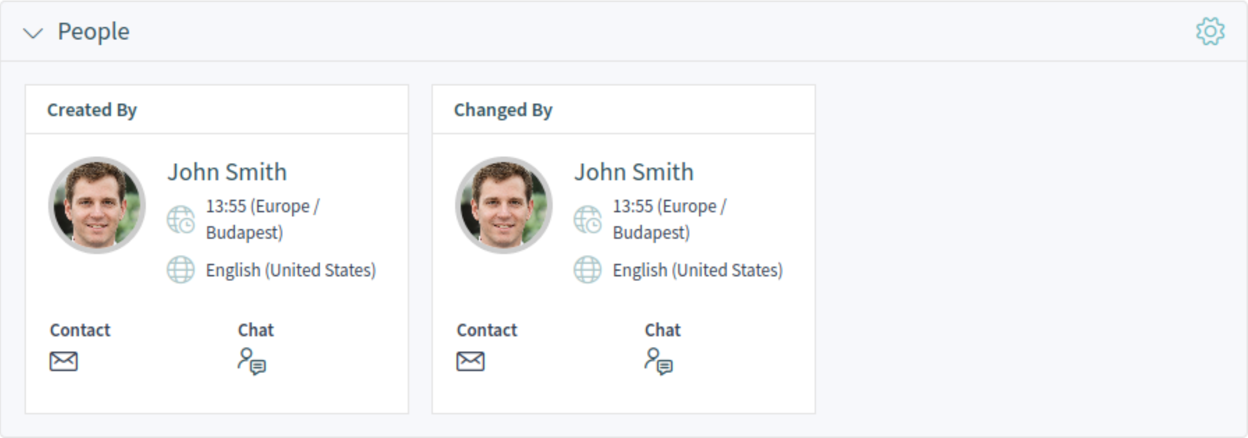
Fig. 11: Linked Appointments Widget


Comment (internal)

The following chapters are finished:

- Navigation And Usage
- Personalization

Fig. 12: Comment Widget


People
Created By
Changed By
Contact
Chat
Contact
Chat

Created By: John Smith, 13:55 (Europe / Budapest), English (United States)

Changed By: John Smith, 13:55 (Europe / Budapest), English (United States)

Fig. 13: People Widget

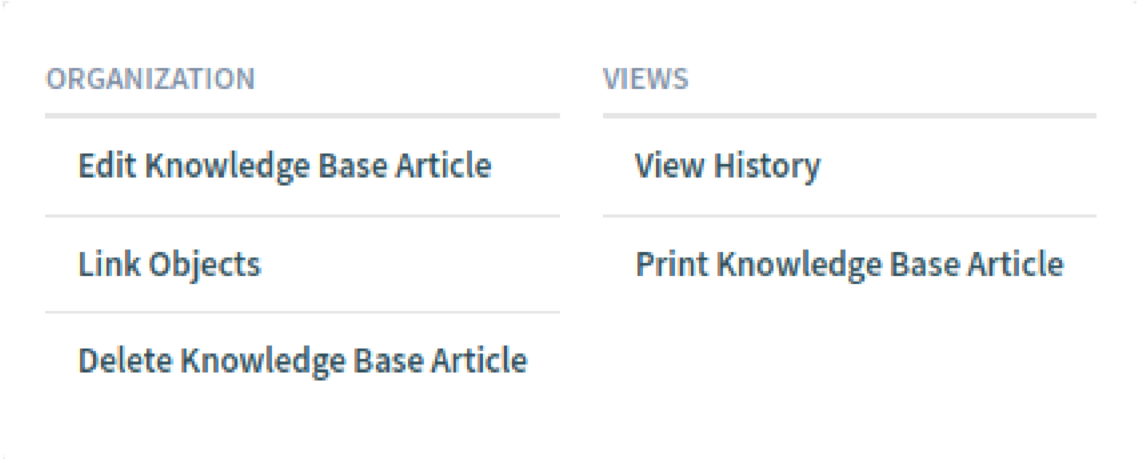

ORGANIZATION
Edit Knowledge Base Article
Link Objects
Delete Knowledge Base Article
VIEWS
View History
Print Knowledge Base Article

Fig. 14: Knowledge Base Article Detail View Actions

- **Edit Knowledge Base Article** This action allows you to edit the knowledge base article. The edit screen is very similar to the create knowledge base article screen, but the fields are already filled with values.
- **Link Objects** This action allows you to link other business objects to the knowledge base article.
- **Delete Knowledge Base Article** This action allows you to delete the knowledge base article. A confirmation dialog will display to confirm the deletion.

**Views** This column groups the following actions together:

- **View History** This action allows you to view the history of the knowledge base article. The history contains all operations, including timestamp and username, that happened with the knowledge base article in the past.
- **Print Knowledge Base Article** This action allows you to print the knowledge base article to a PDF file and to download it.

# CHAPTER 8

# Customers

Customers in **OTRS** are organizations, companies or authorities. The real users are called *Customer Users*. A fresh OTRS installation contains no customers by default.

## 8.1 Create Customer

Customers can be added by using the links from the main menu and from the action menu.

To add a customer:

1. Choose a data source.

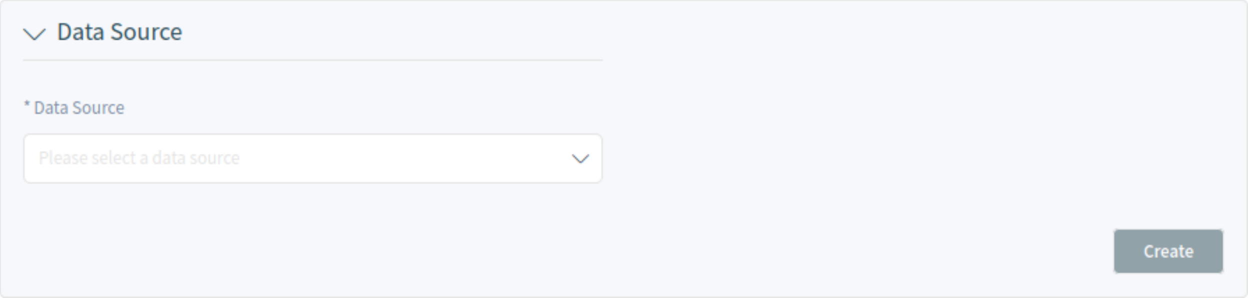
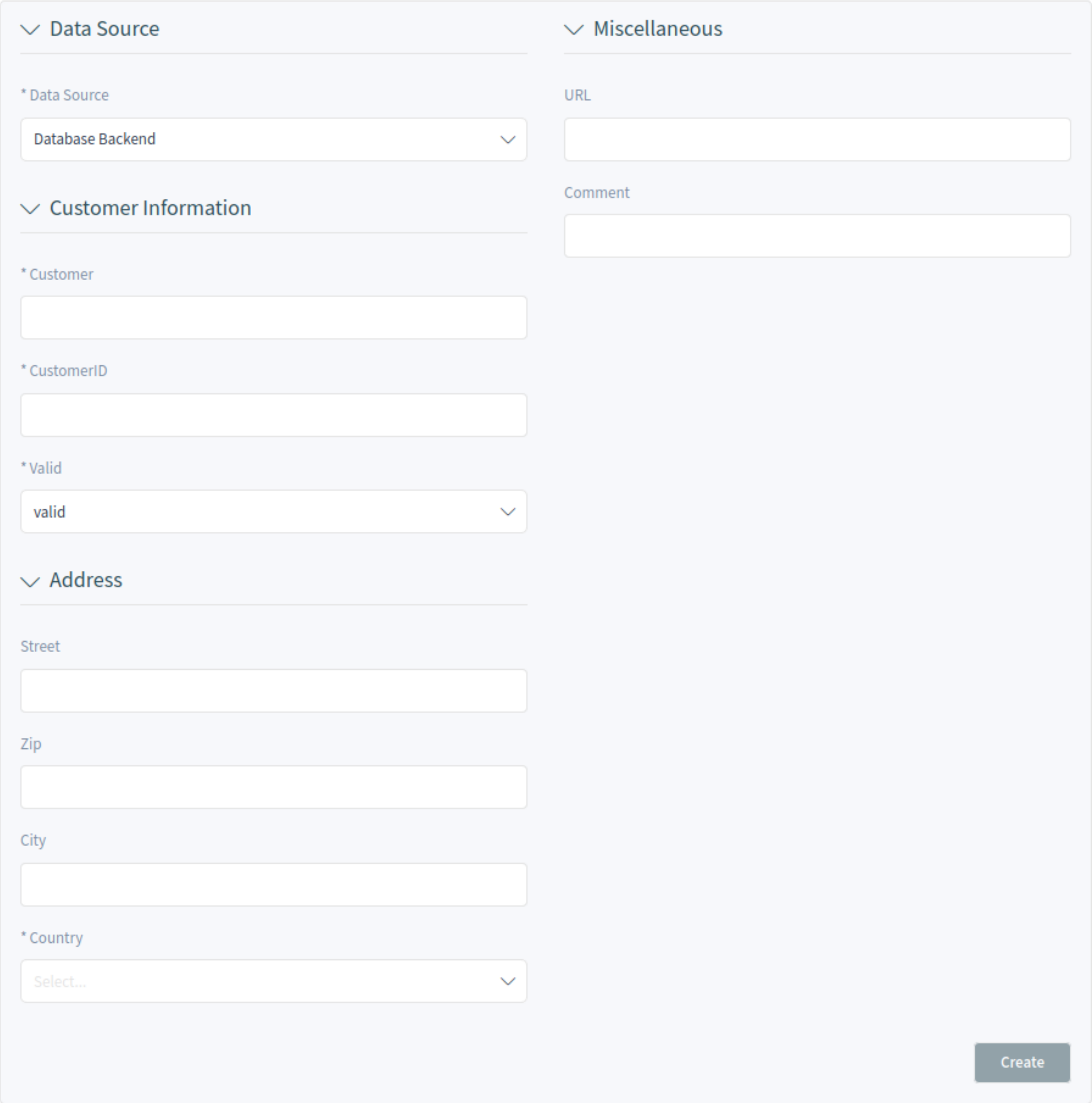


Fig. 1: Select Data Source

2. Fill in the required fields.
3. Click on the *Create* button.

The following settings are available when adding a customer. The fields marked with an asterisk are mandatory.

**Data Source *** In this section, the data source for storing customers can be selected. Multiple data sources are supported, including external data sources like LDAP.


Data Source
Miscellaneous
Customer Information
Address
Create

* Data Source: Database Backend

URL:

Comment:

* Customer:

* CustomerID:

* Valid: valid

Street:

Zip:

City:

* Country: Select...

Fig. 2: Add Customer Data

**Note:** External data sources can be read-only.

**Customer Information** In this section, the full name and the internal name of the customer can be added.

**Customer** * The full name of the customer (usually the same as the company name). Any type of characters can be entered into this field, including uppercase letters and spaces.

**CustomerID** * The internal name of the customer. Should contain only letters, numbers and some special characters.

**Valid** * Set the validity of this customer. Customers can only be used in **OTRS** if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the customer.

**Address** In this section, the address information of the customer can be added.

**Street** The street name of the customer.

**Zip** The zip code of the customer.

**City** The city of the customer’s headquarters.

**Country** * The country of the customer. Choose a country from the list.

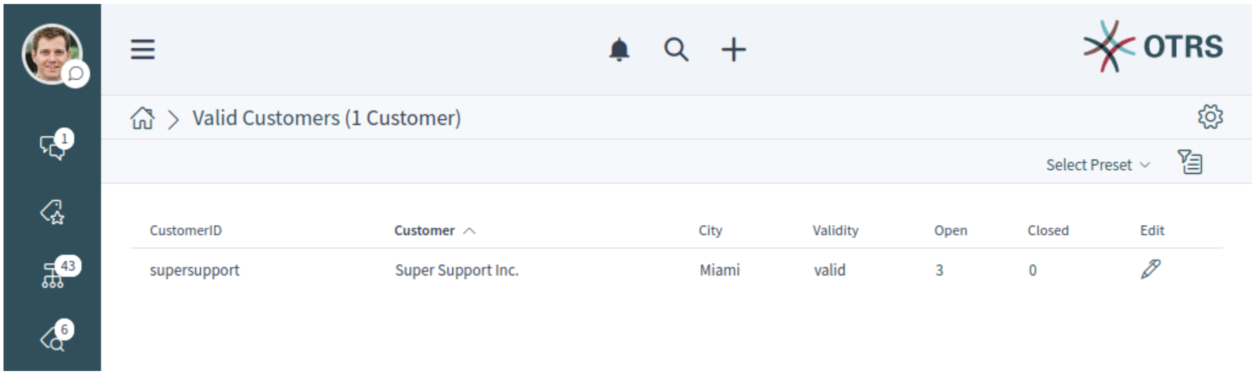
**Miscellaneous** In this section, additional information about the customer can be added.

**URL** The web page or other URL of the customer.

**Comment** Add additional information to this customer. It is recommended that you always fill this field with full sentences for better clarity.

## 8.2 Customer List

Use this screen to browse through the valid customers. The customer list is available from the organizer sidebar.



Valid Customers (1 Customer)

| CustomerID | Customer | City | Validity | Open | Closed | Edit |
|---|---|---|---|---|---|---|
| supersupport | Super Support Inc. | Miami | valid | 3 | 0 | ✎ |

Fig. 3: Customer List

The customer list has no bulk actions. Clicking on the pencil icon in the column *Edit* opens the customer edit screen.

It is possible to preview the customer business card by hovering the mouse over the customer ID or name of a customer. Clicking on a customer in the list opens the customer detail view.

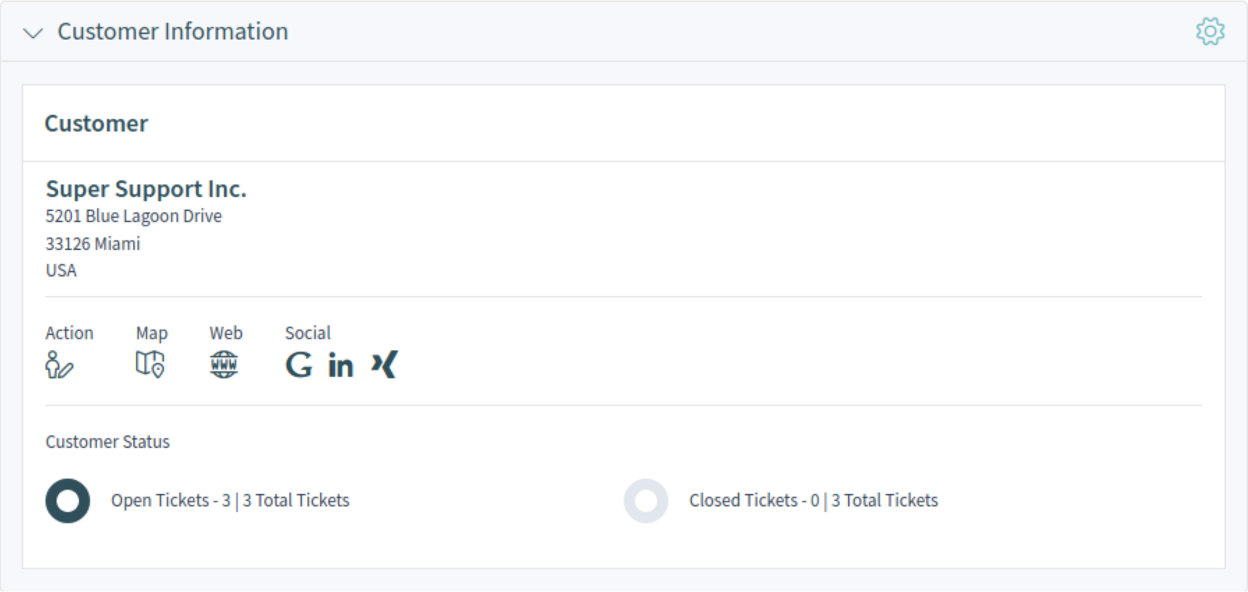
## 8.3 Customer Detail View

Use this screen to see the details of a customer. The customer detail view is available when you select a customer from a customer list.

### 8.3.1 Customer Detail View Widgets

Like other business object detail views, the customer detail view is also highly customizable. Some of the following widgets are displayed with the default installation, but others have to be added in the screen configuration.

**Customer Information Widget** This widget shows information about the customer.



Super Support Inc.
5201 Blue Lagoon Drive
33126 Miami
USA

Open Tickets - 3 | 3 Total Tickets

Closed Tickets - 0 | 3 Total Tickets

Fig. 4: Customer Information Widget

The card shows the number of open and closed tickets related to this customer. From the *Action* section, it is possible to edit the customer. The *Map* section contains a link to view the customer address on a configured map. The URL in the *Web* section points to the customer's website. The *Social* section contains links to some social media pages or search engines that are related to the customer.

**Escalations Widget** This widget lists the customer's escalated tickets. Escalated tickets are tickets that remain open after the date/time that was set by the customer's service level agreement; therefore the ticket needs to be worked on immediately.

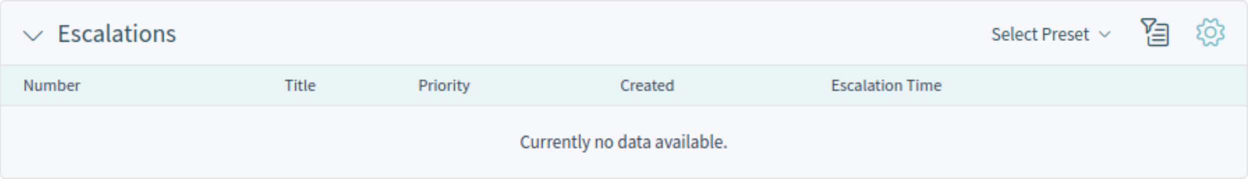
Clicking on a ticket opens the ticket detail view.

**Reminders Widget** This widget lists the customer's pending tickets. Pending tickets are set for work at a later date/time by the agent. The reminder time is going to expire soon.

Clicking on a ticket opens the ticket detail view.

**Open Tickets Widget** This widget lists the customer's open tickets. Open tickets represent the current work to be done by the agent.

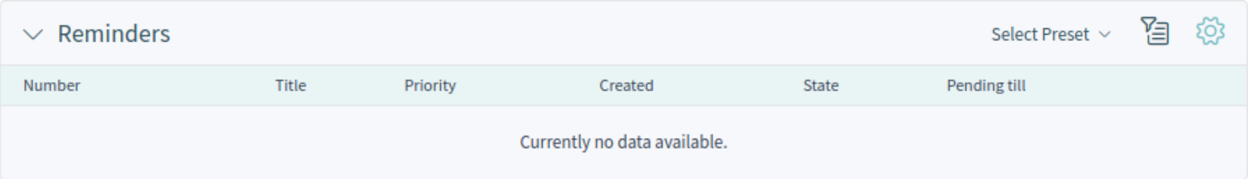
Clicking on a ticket opens the ticket detail view.



| Number | Title | Priority | Created | Escalation Time |
|---|---|---|---|---|

Currently no data available.

Fig. 5: Escalations Widget



| Number | Title | Priority | Created | State | Pending till |
|---|---|---|---|---|---|

Currently no data available.

Fig. 6: Reminders Widget

**Customer Users Widget** This widget is used to list all customer users that belong to the customer. It is possible to edit the customer user and create tickets directly from the widget.

It is possible to preview a customer user's business card by hovering the mouse over the username or name of a customer user. Clicking on a customer user in the list opens the customer user detail view.

**Ticket List Widget** This widget lists all the tickets of the customer.

Clicking on a ticket opens the ticket detail view.

### 8.3.2 Customer Detail View Actions

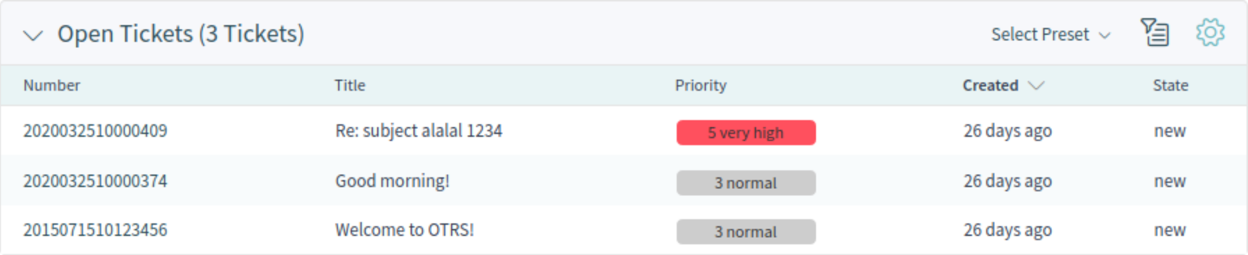
The following actions are available in the customer detail view.

**Organization** This column groups the following actions together:

**Edit Customer** This action allows an agent to edit the customer.

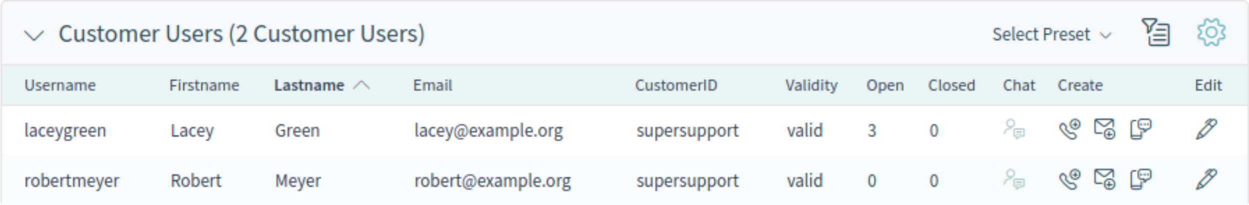
**People** This column groups the following actions together:

**Add Customer User** This action opens the *Create Customer User* screen in order to add a customer user to this customer.



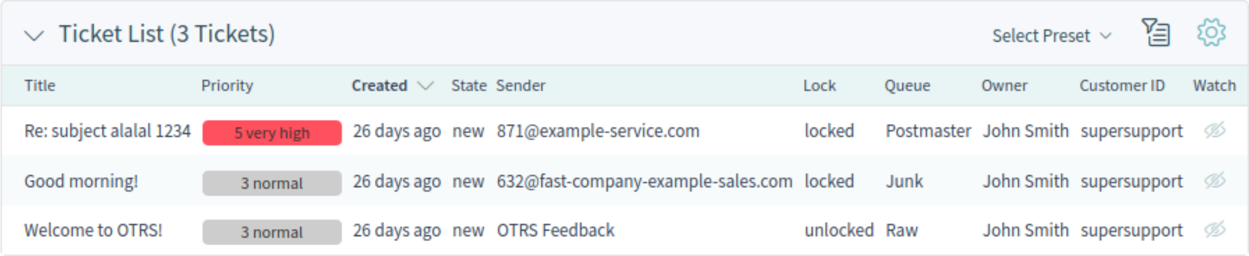
| Number | Title | Priority | Created | State |
|---|---|---|---|---|
| 2020032510000409 | Re: subject alalal 1234 | 5 very high | 26 days ago | new |
| 2020032510000374 | Good morning! | 3 normal | 26 days ago | new |
| 2015071510123456 | Welcome to OTRS! | 3 normal | 26 days ago | new |

Fig. 7: Open Tickets Widget


Customer Users (2 Customer Users)
Select Preset

| Username | Firstname | Lastname | Email | CustomerID | Validity | Open | Closed | Chat | Create | Edit |
|---|---|---|---|---|---|---|---|---|---|---|
| laceygreen | Lacey | Green | lacey@example.org | supersupport | valid | 3 | 0 | 👤 | ☎ ✉ 💬 | ✎ |
| robertmeyer | Robert | Meyer | robert@example.org | supersupport | valid | 0 | 0 | 👤 | ☎ ✉ 💬 | ✎ |

Fig. 8: Customer Users Widget


Ticket List (3 Tickets)
Select Preset

| Title | Priority | Created | State | Sender | Lock | Queue | Owner | Customer ID | Watch |
|---|---|---|---|---|---|---|---|---|---|
| Re: subject alalal 1234 | 5 very high | 26 days ago | new | 871@example-service.com | locked | Postmaster | John Smith | supersupport | 👁 |
| Good morning! | 3 normal | 26 days ago | new | 632@fast-company-example-sales.com | locked | Junk | John Smith | supersupport | 👁 |
| Welcome to OTRS! | 3 normal | 26 days ago | new | OTRS Feedback | unlocked | Raw | John Smith | supersupport | 👁 |

Fig. 9: Ticket List Widget

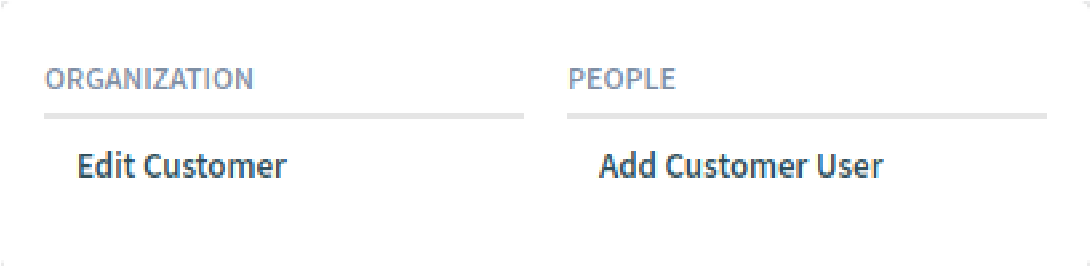

ORGANIZATION
Edit Customer
PEOPLE
Add Customer User

Fig. 10: Customer Detail View Actions

CHAPTER 9

# Customer Users

Customer users in **OTRS** are the real people who work at or are related to *Customers*. A fresh OTRS installation contains no customer users by default.

## 9.1 Create Customer User

Customer users can be added by using the links in the main menu and in the action menu, as well as by using the *Add Customer User* action in a customer detail view.

To add a customer user:

1. Choose a data source

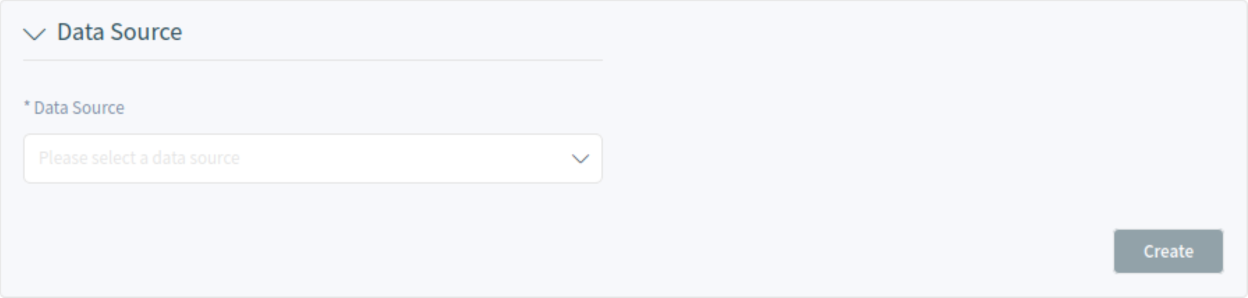
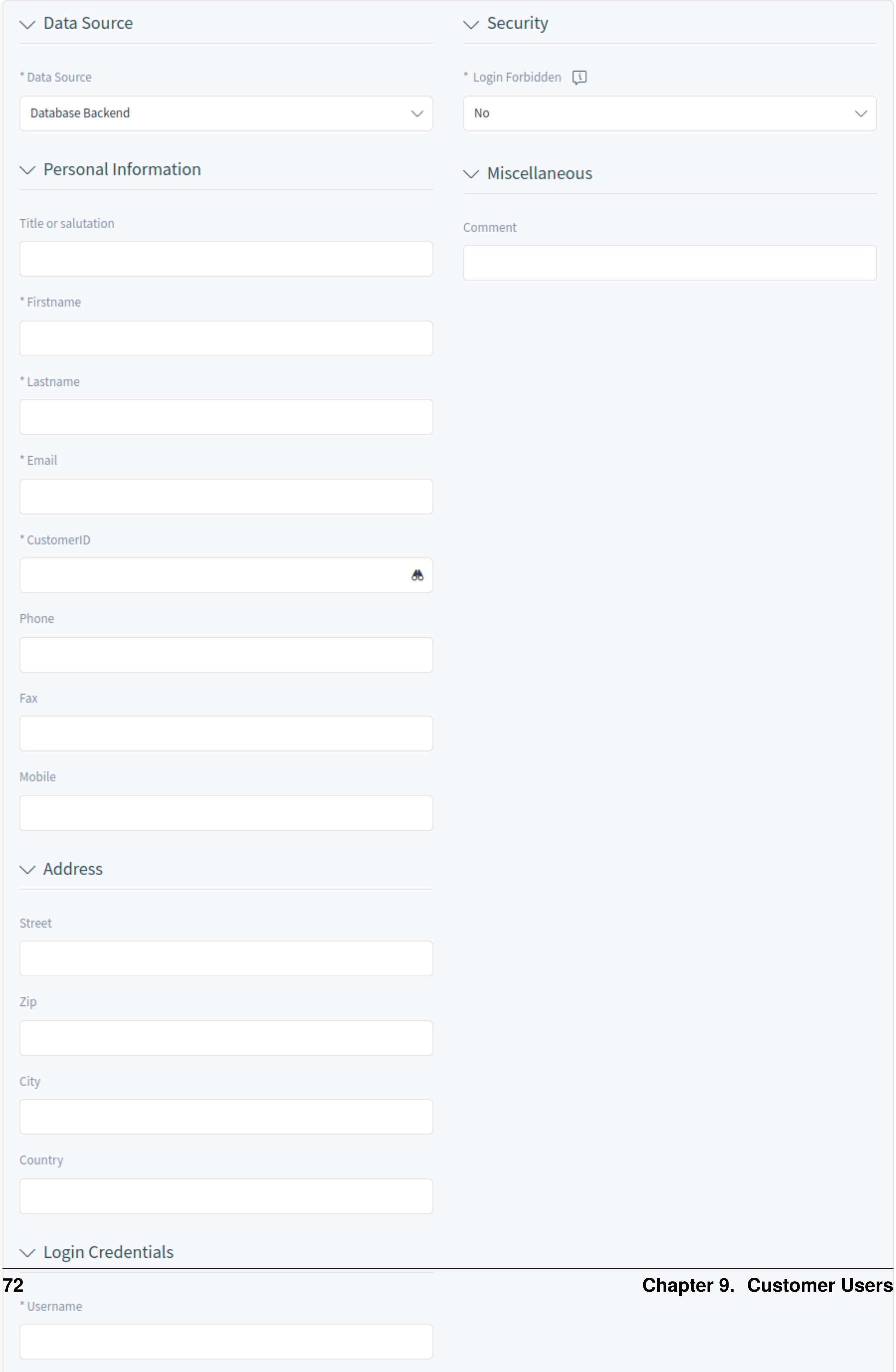


Fig. 1: Select Data Source

2. Fill in the required fields.
3. Click on the *Create* button.

The following settings are available when adding a customer user. The fields marked with an asterisk are mandatory.

**Data Source *** In this section, select the data source for storing customer users. Multiple data sources are supported, including external data sources like LDAP.



Data Source

* Data Source

Database Backend

Security

* Login Forbidden

No

Personal Information

Title or salutation

* Firstname

* Lastname

* Email

* CustomerID

Phone

Fax

Mobile

Miscellaneous

Comment

Address

Street

Zip

City

Country

Login Credentials

* Username

**Note:** External data sources can be read-only.

**Personal Information** In this section, personal information about the customer user can be added.

**Title or salutation** Some name prefixes can be added here like Mr., Dr., Jr., etc.

**Firstname *** The first name of the customer user.

**Lastname *** The last name of the customer user.

**Email *** The email address of the customer user.

**CustomerID *** The customer ID of the customer's company, also known as the customer to which the customer user belongs.

**Phone** The phone number of the customer user.

**Fax** The fax number of the customer user.

**Mobile** The cellphone number of the customer user.

**Address** In this section, address information about the customer user can be added.

**Street** The street name of the customer user.

**Zip** The zip code of the customer user.

**City** The city of the customer user.

**Country** The country of the customer user.

**Login Credentials** In this section, login credentials for the customer user can be added.

**Username *** The username of the customer user.

**Password** The password of the customer user. The password can be restricted by the admin-configured password policy.

**Valid *** Sets the validity of this customer user. Each customer user record can be used in OTRS only when this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the customer user.

**Security** In this section, security restrictions for the customer user can be changed.

**Login Forbidden** The login is forbidden if the customer user has reached the maximum number of failed logins. In this case, the ability for the customer user to login can be re-enabled here.

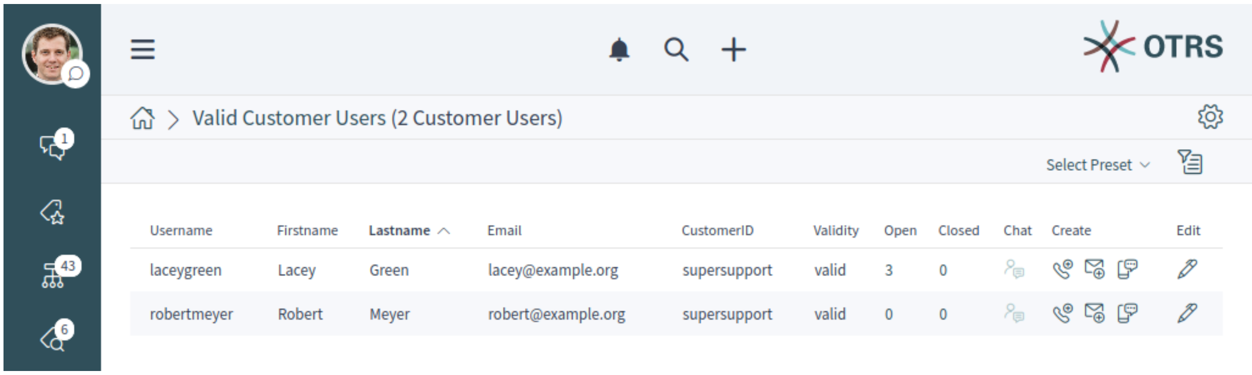
**Miscellaneous** In this section, additional information for the customer user can be added.

**Comment** Add additional information to this customer user. It is recommended that you always fill this field with full sentences for better clarity.

## 9.2 Customer User List

Use this screen to browse through the valid customer users. The customer user list is available from the organizer sidebar.

The customer user list has no bulk actions. If the customer user is online, an icon is active in the *Chat* column. Using this icon, the agent can start a chat with the customer user. A special column in this list is the column *Create*. Clicking on the icon in this column opens the create ticket screen. Clicking on the pencil icon in the column *Edit* opens the edit customer user action.



| Username | Firstname | Lastname | Email | CustomerID | Validity | Open | Closed | Chat | Create | Edit |
|---|---|---|---|---|---|---|---|---|---|---|
| laceygreen | Lacey | Green | lacey@example.org | supersupport | valid | 3 | 0 | | | |
| robertmeyer | Robert | Meyer | robert@example.org | supersupport | valid | 0 | 0 | | | |

Fig. 3: Customer User List

It is possible to preview the customer user business card by hovering the mouse over the username or the name of a customer user. Clicking on a customer user in the list opens the customer user detail view.

## 9.3 Customer User Detail View

Use this screen to see the details of a customer user. The customer user detail view is available when you select a customer user from a customer user list or from a widget where customer users are displayed.

### 9.3.1 Customer User Detail View Widgets

Like other business object detail views, the customer user detail view is also highly customizable. Some of the following widgets are displayed with the default installation, but others have to be added in the screen configuration.

**Customer Information Widget** This widget shows information about the customer user and about its customer.

The cards show the number of open and closed tickets. If the customer user is online, the icon is active in the *Chat* section. Using this icon, the agent can start a chat with the customer user. Clicking on the icons in the *Create* section opens the create ticket screen. From the *Action* section, it is possible to edit the customer user or the customer. The *Map* section contains a link to view the customer's address on a configured map. The URL in the *Web* section points to the customer's website. The *Social* section contains links to some social media pages or search engines that are related to the customer user or the customer.

**Escalations Widget** This widget lists the escalated tickets that are related to this customer user. Escalated tickets are tickets that remain open after the time that was set by the customer user's service level agreement; therefore the ticket needs to be worked on immediately.

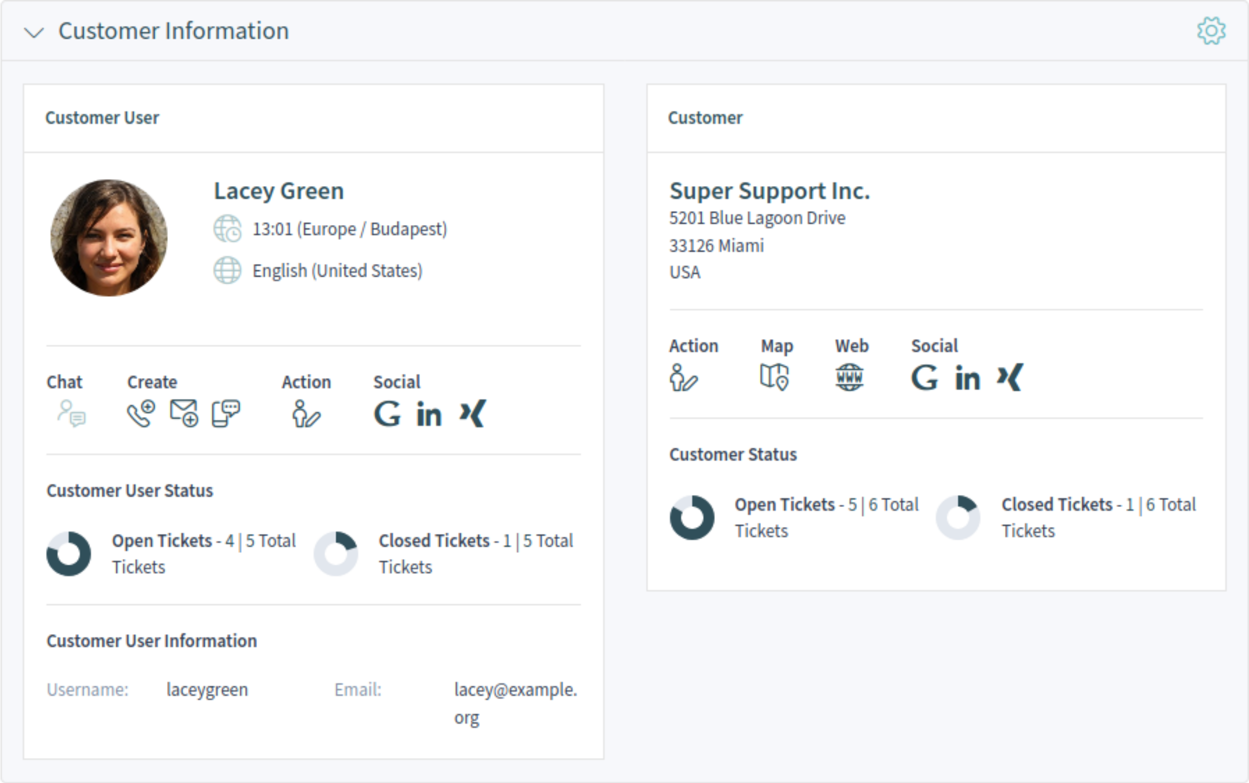
Clicking on a ticket opens the ticket detail view.

**Reminders Widget** This widget lists pending tickets related to the customer user. Pending tickets are set for work at a later date by the agent, and the reminder time is going to expire soon.

Clicking on a ticket opens the ticket detail view.

**Open Tickets Widget** This widget lists the open tickets related to the customer user. Open tickets represent the current work to be done by the agent.

Clicking on a ticket opens the ticket detail view.


Customer Information
Chat
Create
Action
Social
Map
Web

**Customer User**

**Lacey Green**
13:01 (Europe / Budapest)
English (United States)

**Customer User Status**

Open Tickets - 4 | 5 Total Tickets
Closed Tickets - 1 | 5 Total Tickets

**Customer User Information**

| | | | |
|---|---|---|---|
| Username: | laceygreen | Email: | lacey@example.org |

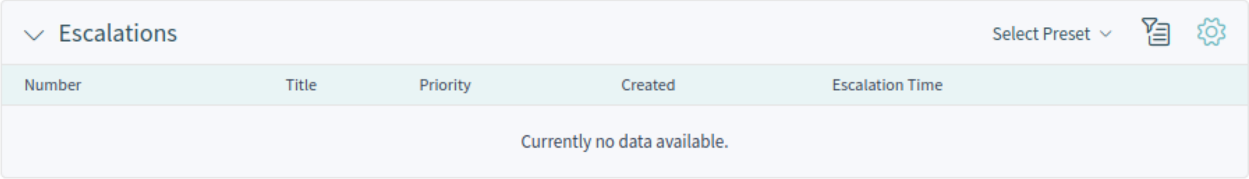
**Customer**

**Super Support Inc.**
5201 Blue Lagoon Drive
33126 Miami
USA

**Customer Status**

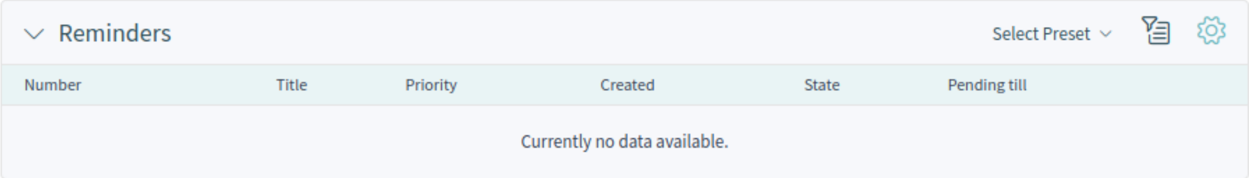
Open Tickets - 5 | 6 Total Tickets
Closed Tickets - 1 | 6 Total Tickets

Fig. 4: Customer Information Widget


Escalations
Select Preset

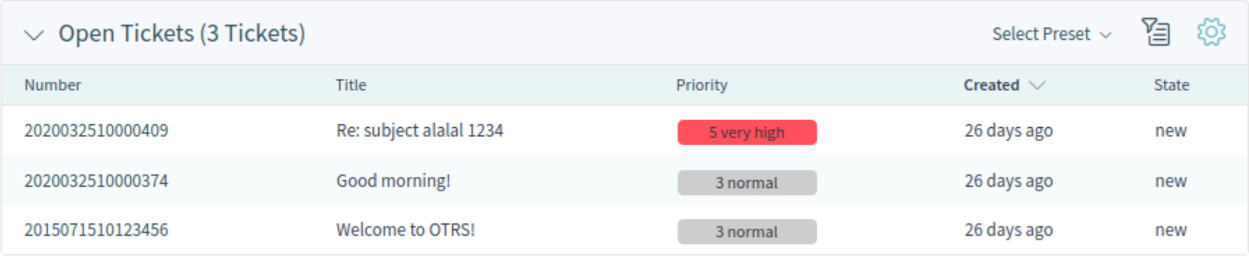
| Number | Title | Priority | Created | Escalation Time |
|---|---|---|---|---|
| Currently no data available. | | | | |

Fig. 5: Escalations Widget


Reminders
Select Preset

| Number | Title | Priority | Created | State | Pending till |
|---|---|---|---|---|---|
| Currently no data available. | | | | | |

Fig. 6: Reminders Widget

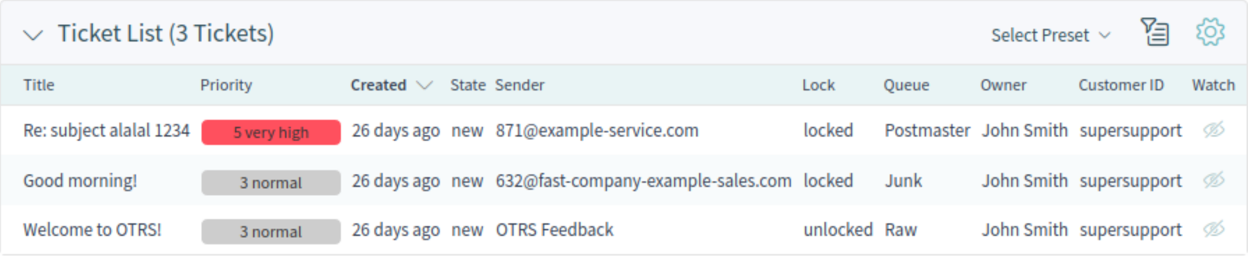

Open Tickets (3 Tickets)
Select Preset

| Number | Title | Priority | Created | State |
|---|---|---|---|---|
| 2020032510000409 | Re: subject alalal 1234 | 5 very high | 26 days ago | new |
| 2020032510000374 | Good morning! | 3 normal | 26 days ago | new |
| 2015071510123456 | Welcome to OTRS! | 3 normal | 26 days ago | new |

Fig. 7: Open Tickets Widget

**Ticket List Widget** This widget lists all of the tickets related to the customer user.

Clicking on a ticket opens the ticket detail view.



Ticket List (3 Tickets)

| Title | Priority | Created | State | Sender | Lock | Queue | Owner | Customer ID | Watch |
|---|---|---|---|---|---|---|---|---|---|
| Re: subject alalal 1234 | 5 very high | 26 days ago | new | 871@example-service.com | locked | Postmaster | John Smith | supersupport | |
| Good morning! | 3 normal | 26 days ago | new | 632@fast-company-example-sales.com | locked | Junk | John Smith | supersupport | |
| Welcome to OTRS! | 3 normal | 26 days ago | new | OTRS Feedback | unlocked | Raw | John Smith | supersupport | |

Fig. 8: Ticket List Widget

## 9.3.2 Customer User Detail View Actions

The following actions are available in the customer user detail view.

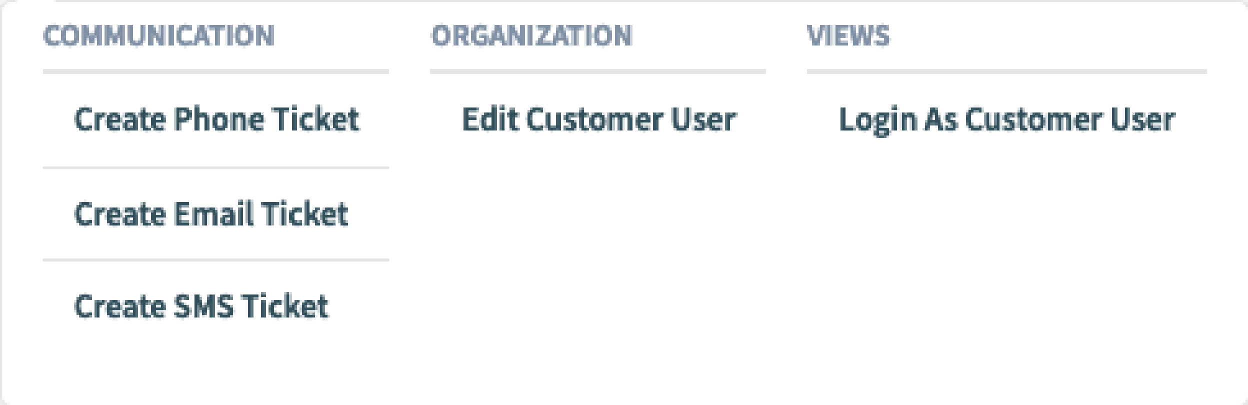


Fig. 9: Customer User Detail View Actions

**Communication** This column groups the following actions together:

**Create Phone Ticket** This action opens the *New Phone Ticket* screen in which the customer user will be pre-selected.

**Create Email Ticket** This action opens the *New Email Ticket* screen in which the customer user will be pre-selected.

**Create SMS Ticket** This action opens the *New SMS Ticket* screen in which the customer user will be pre-selected.

> **Note:** Additional contract is needed to use this action.

**Start Chat** This action allows the agent to start a chat with the customer user. This action is visible only if the customer user is online.

**Organization** This column groups the following actions together:

**Edit Customer User** This action allows you to edit the customer user.

**Views** This column groups the following actions together:

**Login as Customer User** This action opens the external interface and logs in as the selected customer user.

**Note:** The login as customer user feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

# CHAPTER 10

# Notifications

**OTRS** supports ticket notifications and appointment notifications. Ticket notifications show events happening on a ticket, for example the change of the owner or the movement into another queue. Appointment notifications show time-based events for calendars. Both notification types are displayed in the notification list.

Notifications can be received via email or SMS, as well as by using the web view. If the *Web View* notification method is selected, then the notification will be shown in the notifications list, and the bell icon at the header area of the agent interface will display the number of new notifications.

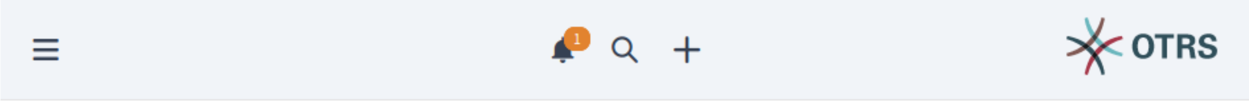
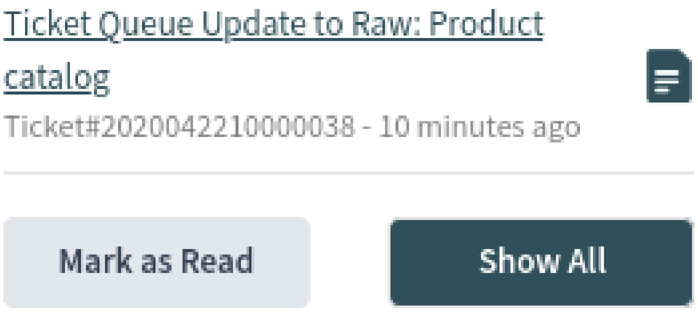


Fig. 1: New Notification Received

Clicking on the bell icon opens a popup where the latest five notifications are displayed.



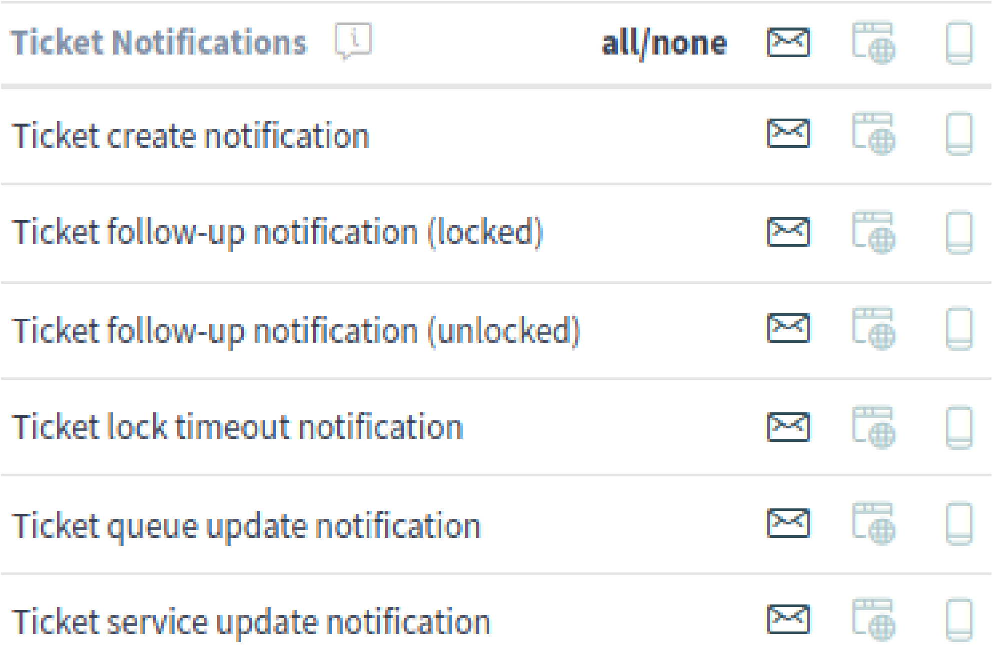
Ticket Queue Update to Raw: Product catalog

Ticket#2020042210000038 - 10 minutes ago

Fig. 2: Notification Popup

Use the *Mark as Read* button to mark all notifications as read. Clicking on the *Show All* button opens the notification list where all notifications are displayed. Clicking on the document icon opens the notification list and shows the notification details. This action also marks the notification as read.

The preferred notification method can be set in the *Notification Settings* section of the *Personalization* menu. In the same menu, agents can select their preferred queues. Notifications will display only for tickets that are in the agent’ s preferred queues.



Ticket Notifications all/none

Ticket create notification

Ticket follow-up notification (locked)

Ticket follow-up notification (unlocked)

Ticket lock timeout notification

Ticket queue update notification

Ticket service update notification

Fig. 3: Ticket Notifications Widget

The possible methods are *Email*, *Web View* or *SMS*.

## 10.1 Notification List

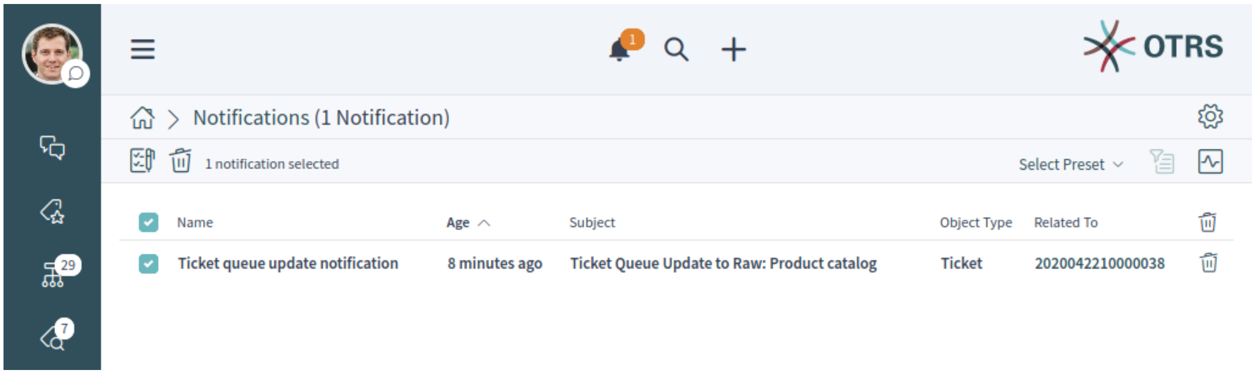
The notification list shows the ticket notifications and appointment notifications.

Selecting a notification opens a widget with the full text of the notification. There is a *Show Ticket* or *Show Appointment* button to open the relevant ticket in the ticket detail view or to show the appointment in the calendar.

### 10.1.1 Notification List Actions

The notification list supports some actions that can be performed on many notifications at the same time. To enable the bulk actions, the agent has to select at least one notification in the list and click on an icon in the breadcrumb bar.

The note icon makes it possible to mark the selected notifications as read. This action works for unread notifications only; there is no way to mark a notification as unread.

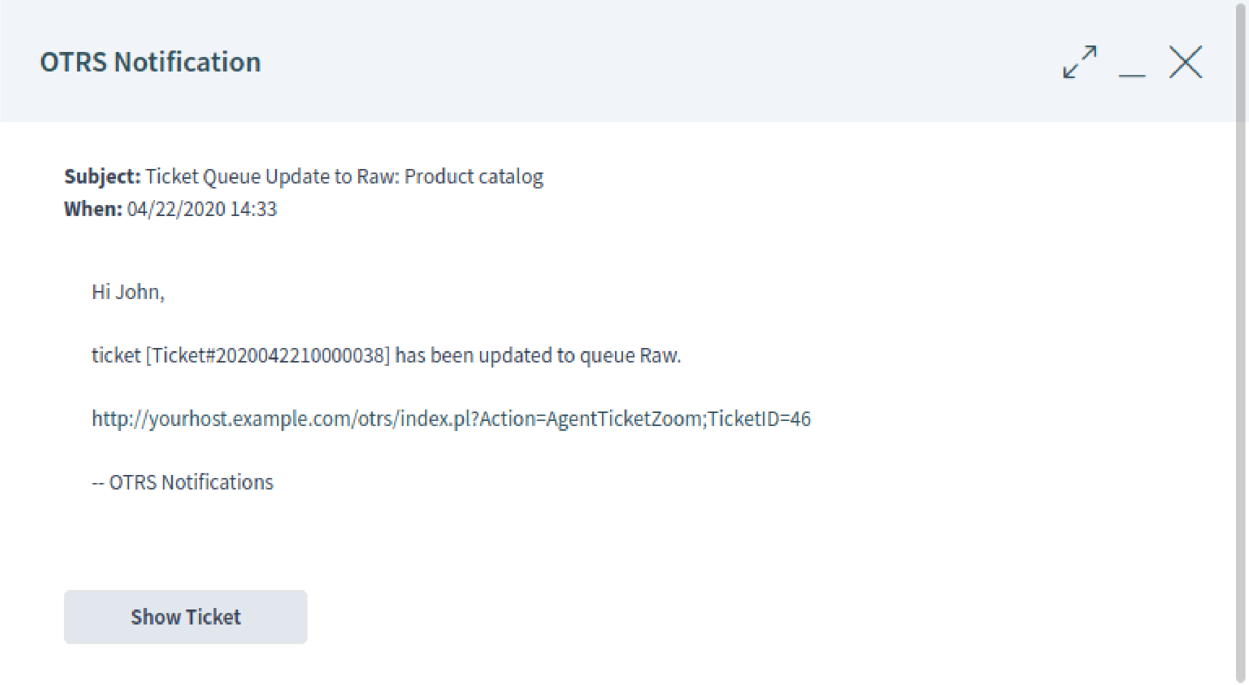


Notifications (1 Notification)

1 notification selected

| ☑ | Name | Age | Subject | Object Type | Related To |
|---|---|---|---|---|---|
| ☑ | Ticket queue update notification | 8 minutes ago | Ticket Queue Update to Raw: Product catalog | Ticket | 2020042210000038 |

Fig. 4: Notification List


OTRS Notification

**Subject:** Ticket Queue Update to Raw: Product catalog
**When:** 04/22/2020 14:33

Hi John,

ticket [Ticket#2020042210000038] has been updated to queue Raw.

http://yourhost.example.com/otrs/index.pl?Action=AgentTicketZoom;TicketID=46

-- OTRS Notifications

Fig. 5: Notification Details

The trash icon allows users to delete the selected notifications. Notifications can be also deleted with the trash icon in the last column of the list.

**Warning:** The notifications will be deleted without confirmation.

CHAPTER 11

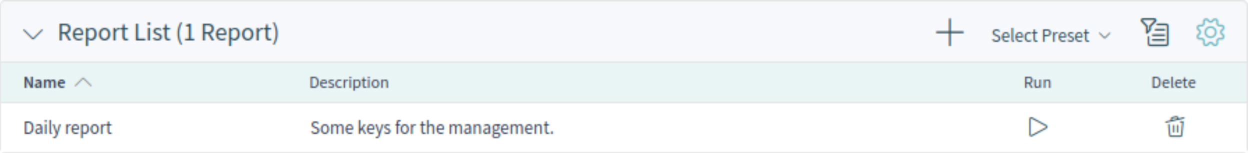
# Statistics and Reports

This screen acts as a dashboard for statistics and reports.

**Note:** The agent has to be the member of the group `stats` to use this dashboard.

## 11.1 Reports

Reports are automatically generated statistics. In this widget, it is possible to set statistics as reports.



| Name | Description | Run | Delete |
|---|---|---|---|
| Daily report | Some keys for the management. | ▷ | 🗑 |

Fig. 1: Report List Widget

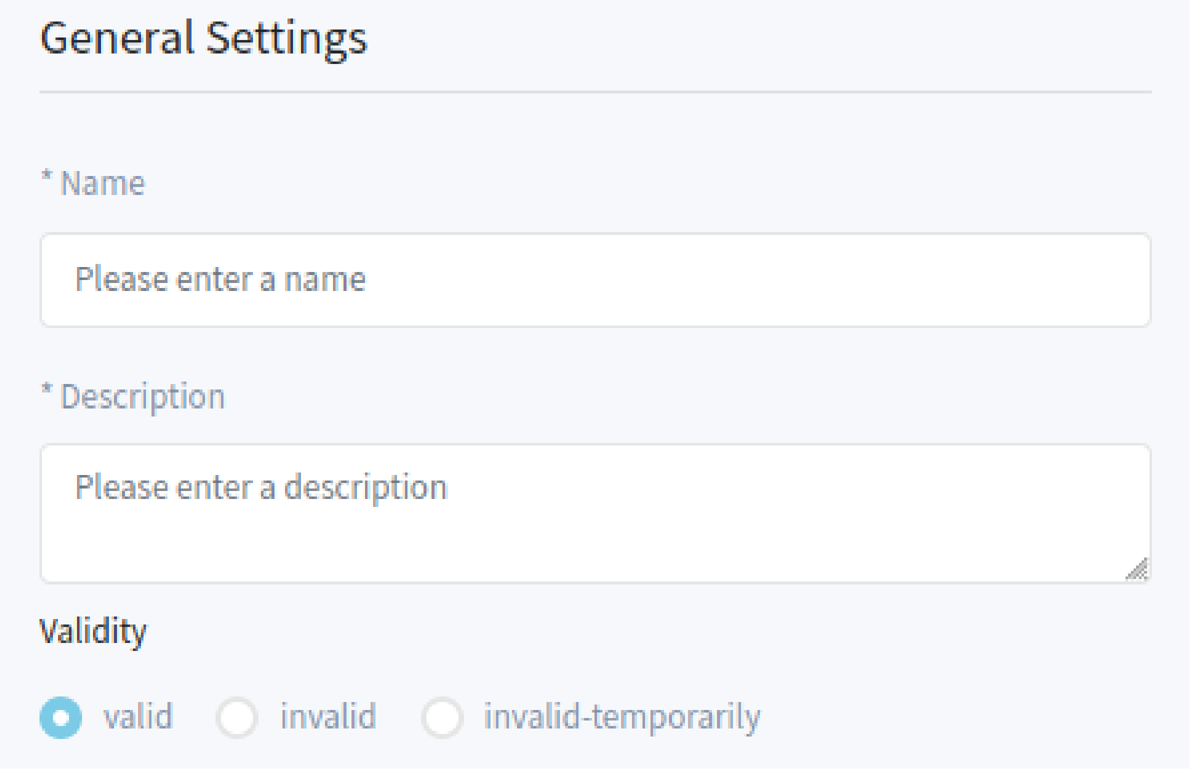
To create a report:

1. Click on the + icon in the header of the *Report List* widget. A new screen will be displayed for the report creation.
2. Fill in the general information about the report.

   **Name *** The name of the report.

   **Description *** Add additional information to this report. It is recommended that you always fill this field with full sentences for better clarity, because the description will also be displayed in the report list.

   **Validity** Set the validity of this report. Reports can only be used in **OTRS** only if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the report.



General Settings

* Name

Please enter a name

* Description

Please enter a description

Validity

● valid ○ invalid ○ invalid-temporarily

Fig. 2: General Report Information

3. Select the times when the report will be automatically generated and fill in the email details.

   **No schedule** No email will be sent automatically.

   **Basic schedule** Select an automatic generation time from the list. An email with the report will be sent at this configured time.

   **Custom schedule** Use cron syntax to define custom times for sending the emails.

   **Automatic Generation Language** Select a language from the list for the report generation.

   **Email Subject** The subject for the email containing the report can be added here.

   **Email Body** The body text for the email containing the report can be added here.

   **Email Recipients** The recipients for the email containing the report can be added here, separated by commas.

4. Fill in the output settings.

   **Headline** This text will be used as headline text in the report.

   **Title** The title of the report.

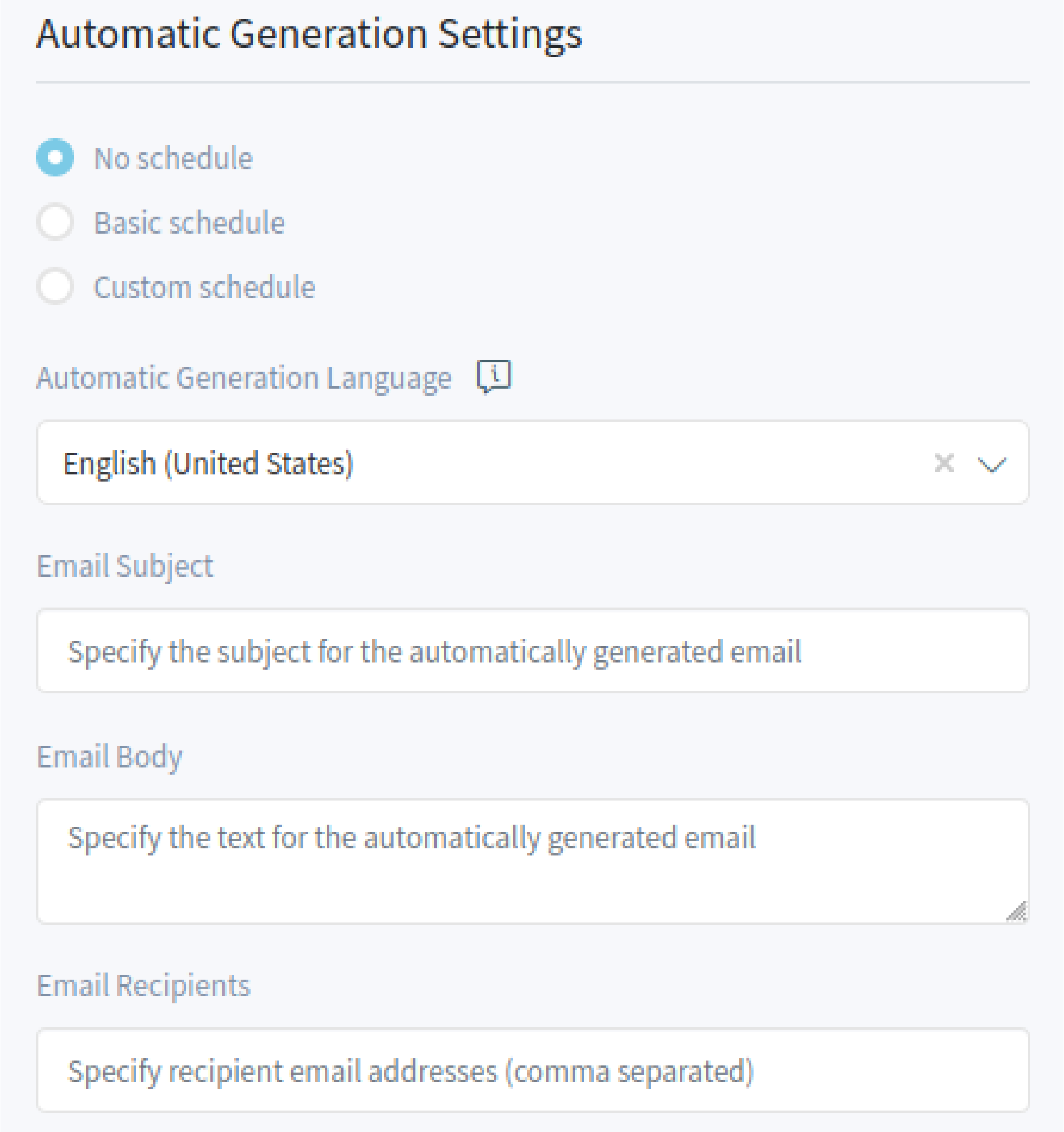
   **Caption for Preamble** The caption for preamble included in the report.

   **Preamble** The preamble text of the report.

   **Caption for Epilogue** The caption for epilogue included in the report.

   **Epilogue** The epilogue text of the report.

5. Select one or more statistics to be added to the report. Each added statistic has its own overview and settings screen.



Automatic Generation Settings

● No schedule
○ Basic schedule
○ Custom schedule

Automatic Generation Language

English (United States)

Email Subject

Specify the subject for the automatically generated email

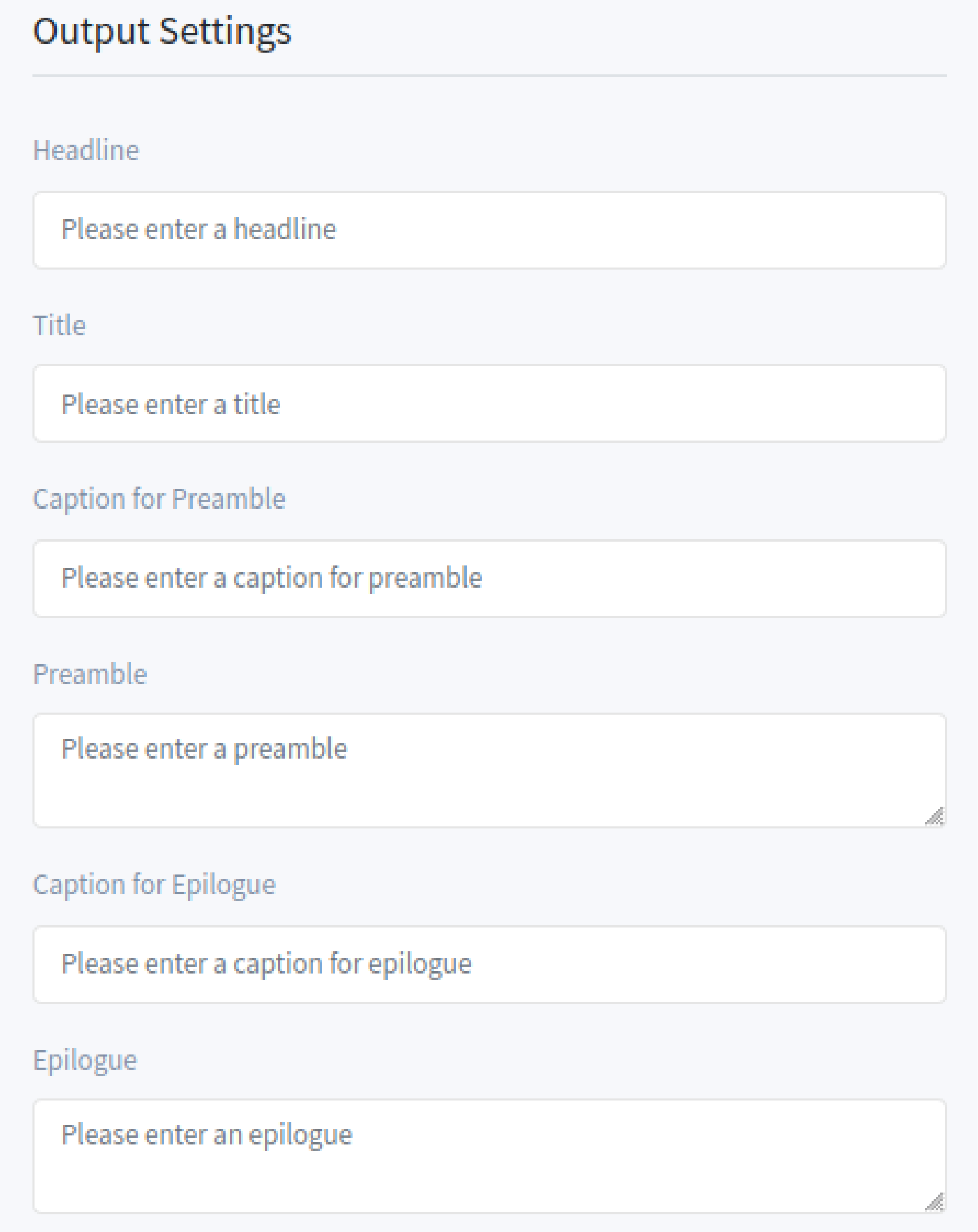
Email Body

Specify the text for the automatically generated email

Email Recipients

Specify recipient email addresses (comma separated)

Fig. 3: Automatic Generation Settings



Output Settings
Headline
Please enter a headline
Title
Please enter a title
Caption for Preamble
Please enter a caption for preamble
Preamble
Please enter a preamble
Caption for Epilogue
Please enter a caption for epilogue
Epilogue
Please enter an epilogue

Fig. 4: Output Settings

6. After all information has been collected and set, click on the *Create Report* button to create the report.

The edit report screen is the same as the create report screen, but the fields are pre-filled with the current values.

To edit a report:

1. Select a report in the *Report List* widget.
2. Modify the fields.
3. Click on the *Save* or *Save and Close* button.

To run a report immediately:

1. Click on the play icon in the *Run* column.
2. Click on the *Run Report* button in the new screen.

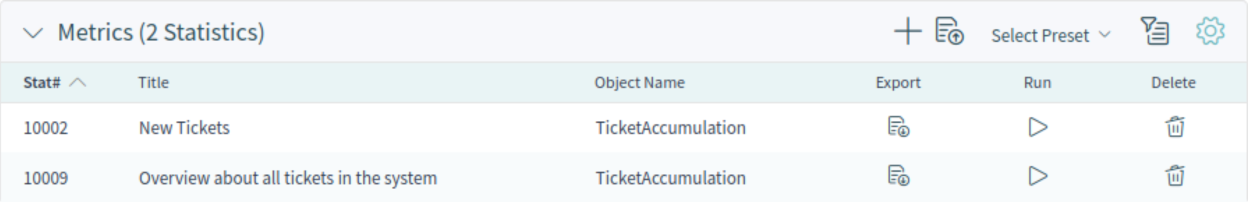
To delete a report:

1. Click on the trash icon in the *Delete* column.
2. Click on the *Yes* button in the confirmation dialog.

## 11.2 Statistics

**OTRS** comes with some pre-installed statistics. Lists of statistics can be found in separate widgets for each type of statistic.

**Metrics Widget** This widget list the statistics that are displayed in a table format.



| Stat# | Title | Object Name | Export | Run | Delete |
|---|---|---|---|---|---|
| 10002 | New Tickets | TicketAccumulation | | ▷ | 🗑 |
| 10009 | Overview about all tickets in the system | TicketAccumulation | | ▷ | 🗑 |

Fig. 5: Metrics Widget

**Lists Widget** This widget list the statistics that are displayed in a list format.

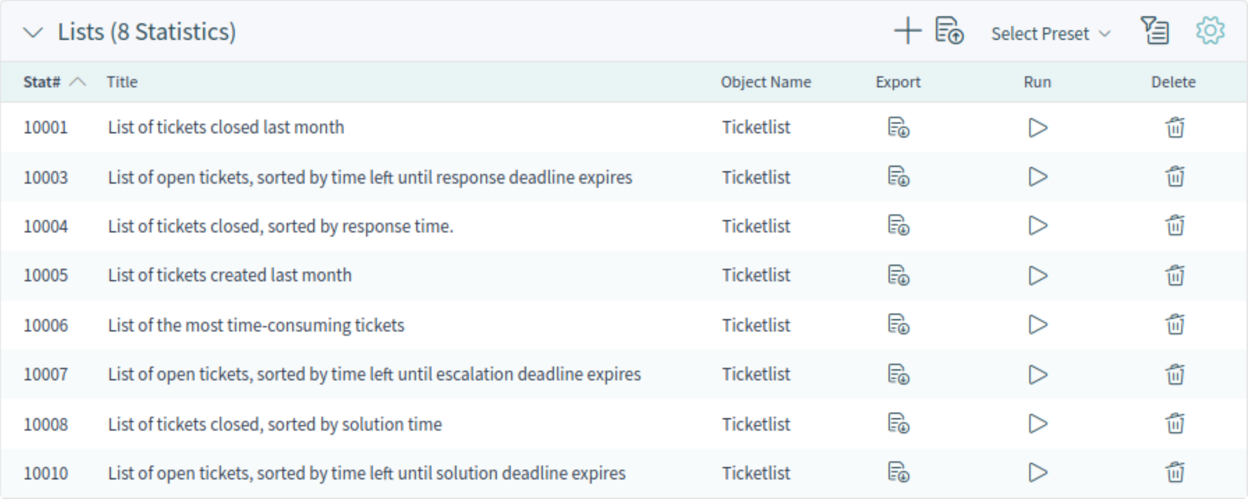
**Static Widget** This widget list the static statistics.

Creating a new statistic requires some steps.

1. Click on the + icon in the header of any statistic widget. A new screen will be displayed for the statistic creation.
2. Select the statistic type. The statistic can be *Matrix*, *List* or *Static*.
    - Matrix: Each cell contains a single data point.
    - List: Each row contains data of one entity.
    - Static: Non-configurable complex statistics.
3. Fill in the general information for the statistic.

   **Title *** Add a title for the statistic.

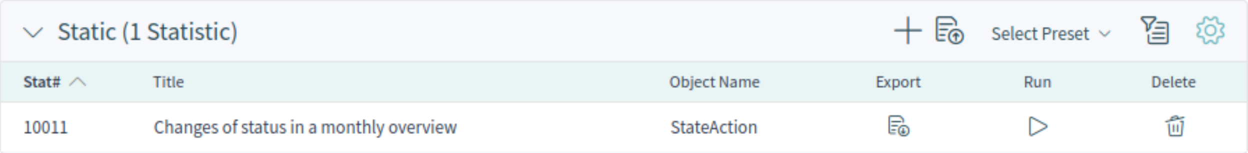
   **Description *** Longer description about the statistic.



Lists (8 Statistics)

| Stat# | Title | Object Name | Export | Run | Delete |
|---|---|---|---|---|---|
| 10001 | List of tickets closed last month | Ticketlist | 🗎 | ▷ | 🗑 |
| 10003 | List of open tickets, sorted by time left until response deadline expires | Ticketlist | 🗎 | ▷ | 🗑 |
| 10004 | List of tickets closed, sorted by response time. | Ticketlist | 🗎 | ▷ | 🗑 |
| 10005 | List of tickets created last month | Ticketlist | 🗎 | ▷ | 🗑 |
| 10006 | List of the most time-consuming tickets | Ticketlist | 🗎 | ▷ | 🗑 |
| 10007 | List of open tickets, sorted by time left until escalation deadline expires | Ticketlist | 🗎 | ▷ | 🗑 |
| 10008 | List of tickets closed, sorted by solution time | Ticketlist | 🗎 | ▷ | 🗑 |
| 10010 | List of open tickets, sorted by time left until solution deadline expires | Ticketlist | 🗎 | ▷ | 🗑 |

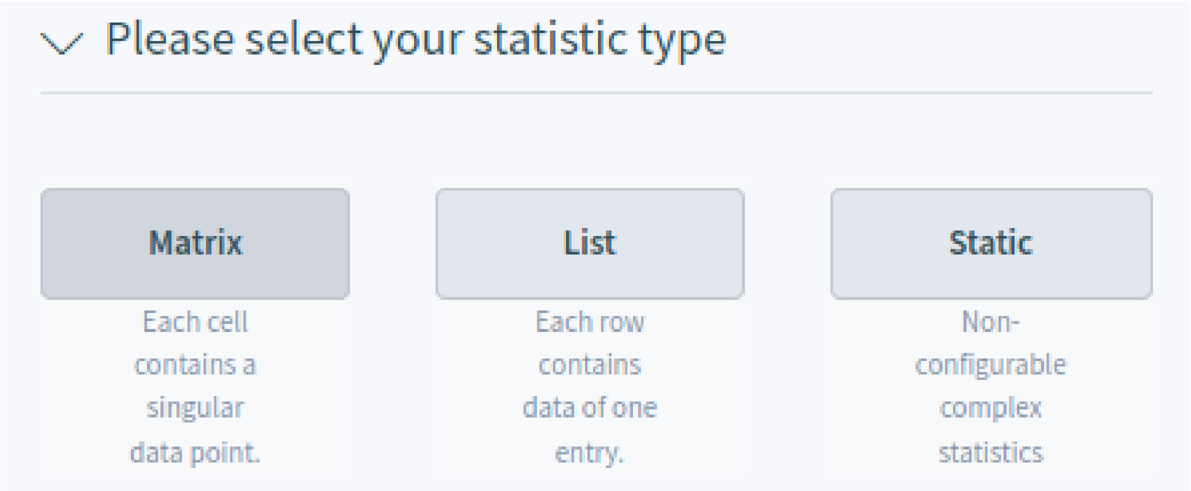
Fig. 6: Lists Widget



Static (1 Statistic)

| Stat# | Title | Object Name | Export | Run | Delete |
|---|---|---|---|---|---|
| 10011 | Changes of status in a monthly overview | StateAction | 🗎 | ▷ | 🗑 |

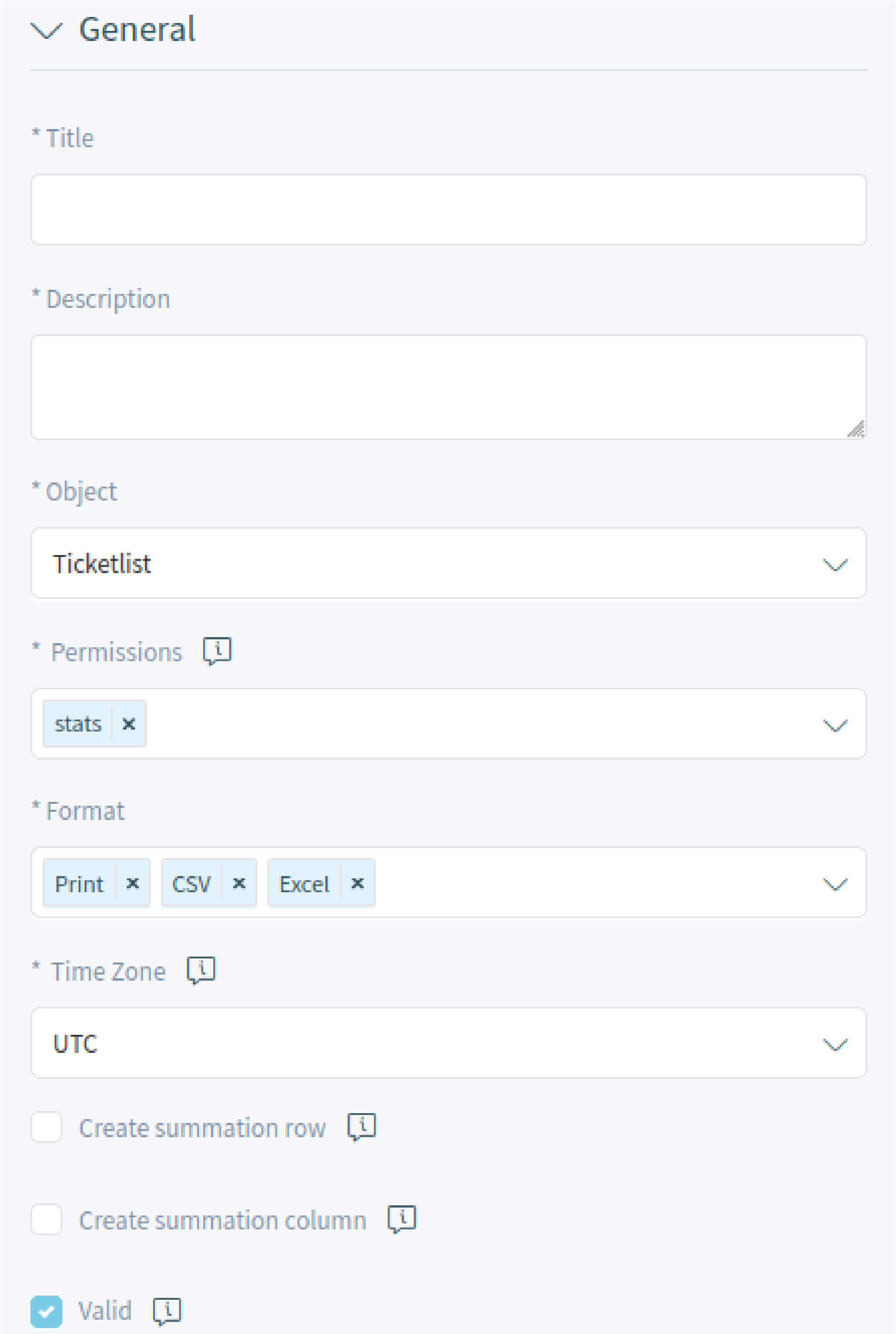
Fig. 7: Static Widget



Please select your statistic type

| Matrix | List | Static |
|---|---|---|
| Each cell contains a singular data point. | Each row contains data of one entry. | Non-configurable complex statistics |

Fig. 8: Statistic Type Selection



General

* Title

* Description

* Object

Ticketlist

* Permissions

stats ×

* Format

Print × CSV × Excel ×

* Time Zone

UTC

☐ Create summation row

☐ Create summation column

☑ Valid

Fig. 9: General Statistic Information

**Object *** Select an object from the list. The available objects depend on the statistic type.

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

**Format *** Select the format that will be available when the statistic is run.

**Time Zone *** Select a time zone for the generated statistic. The selected time periods in the statistic are time zone neutral.

This field is not available for static statistics.

**Create summation row** If this is checked, an additional row is generated containing sums for all data rows.

**Create summation column** If this is checked, an additional column is generated containing sums for all data columns.

**Valid** If this is not checked end users can not generate the statistic.

4. Click on the *Generate Statistic* button. The screen will be refreshed; the previous widgets will be collapsed, and new widgets will be displayed.
5. Select the values for the X-axis.

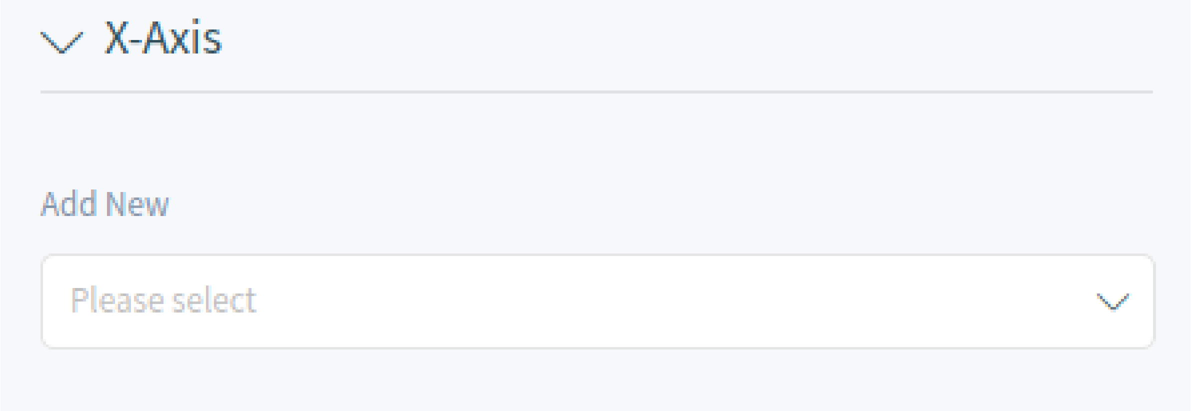


Fig. 10: Configure X-Axis

It is possible to allow changes to element values before running the statistic by checking the checkbox below the list.

The available values depend on the the statistic type.

5. Select the values for the Y-axis.

It is possible to allow changes to element values before running the statistic by checking the checkbox below the list.

The available values depend on the the statistic type.

6. Select the filters for the data.
7. Click on the *Save and Close* button.

During the statistic creation, a preview widget will show the results.

---

**Note:** The preview uses random data and does not consider data filters.

---

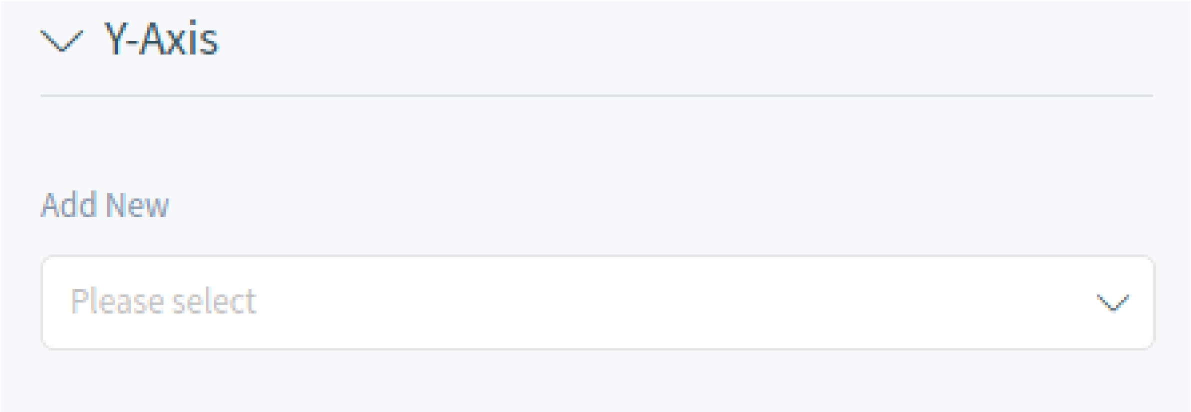

Y-Axis
Add New
Please select

Fig. 11: Configure Y-Axis

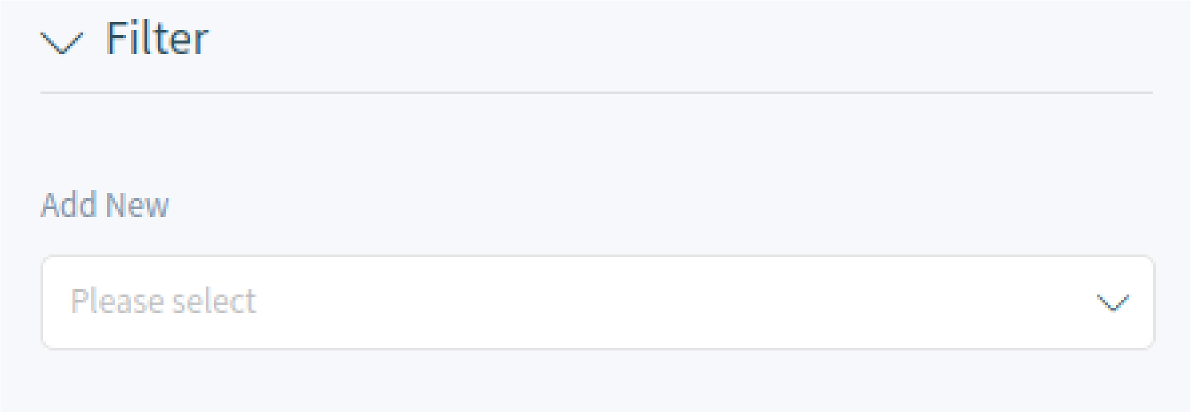
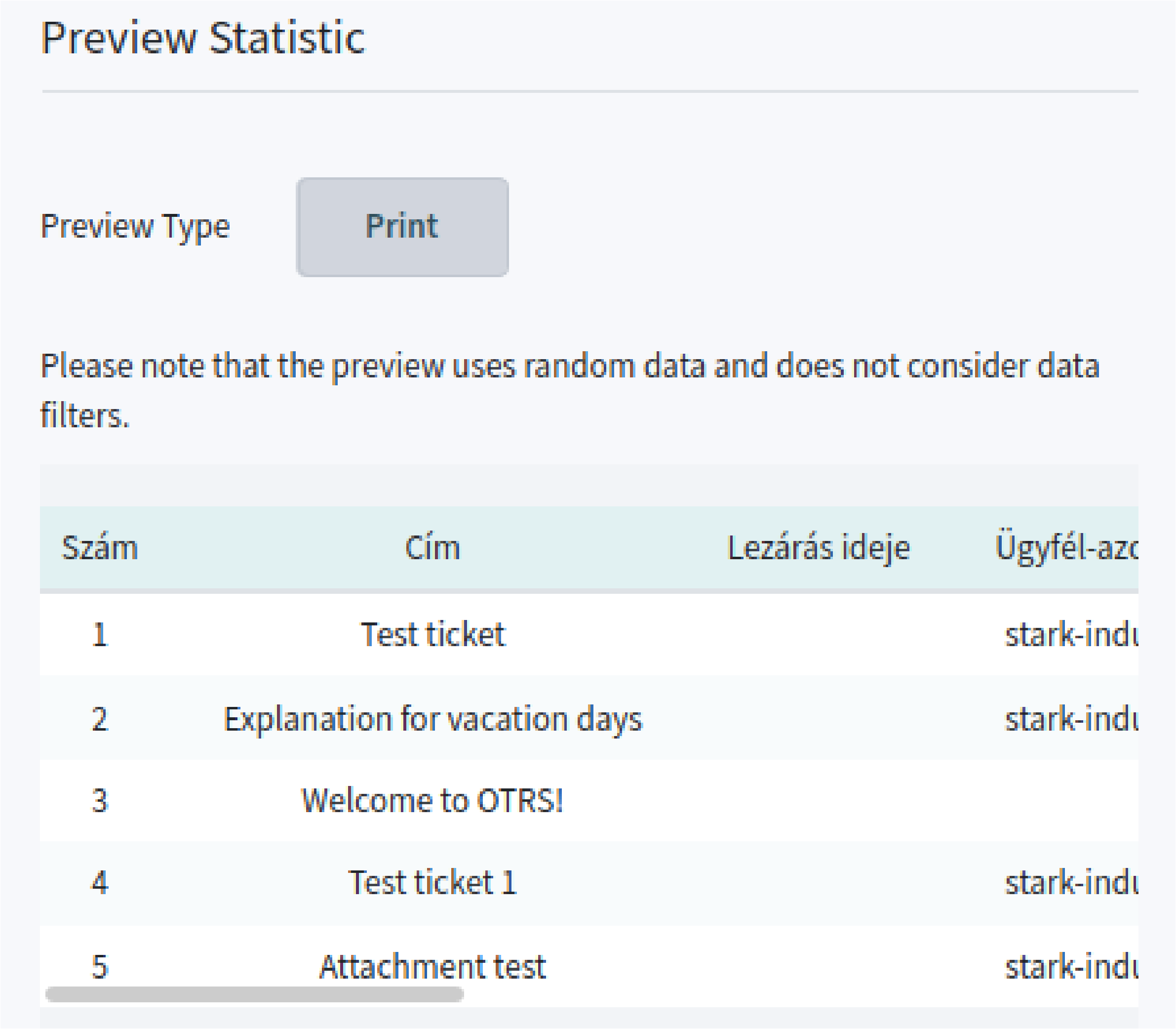

Filter
Add New
Please select

Fig. 12: Add Filters



Preview Statistic

Preview Type

Please note that the preview uses random data and does not consider data filters.

| Szám | Cím | Lezárás ideje | Ügyfél-az |
|---|---|---|---|
| 1 | Test ticket | | stark-ind |
| 2 | Explanation for vacation days | | stark-ind |
| 3 | Welcome to OTRS! | | |
| 4 | Test ticket 1 | | stark-ind |
| 5 | Attachment test | | stark-ind |

Fig. 13: Statistic Preview Widget

The edit statistic screen is the same as the create statistic screen, but the fields are pre-filled with the current values.

To edit a statistic:

1. Select a statistic in any statistic widget.
2. Modify the fields.
3. Click on the *Save* or *Save and Close* button.

To export a statistic:

1. Click on the export icon in the *Export* column.
2. Choose a location in your computer to save the `.xml` file.

To import a statistic:

1. Click on the *Import* button in the header of any statistic widget.
2. Select a previously exported `.xml` file.
3. Modify the fields and the statistics details, if needed.
4. Click on the *Save* or *Save and Close* button.

To run a statistic immediately:

1. Click on the play icon in the *Run* column.
2. Click on the *Run Statistic* button in the new screen.

To delete a statistic:

1. Click on the trash icon in the *Delete* column.
2. Click on the *Yes* button in the confirmation dialog.

# CHAPTER 12

# Calendar Overview

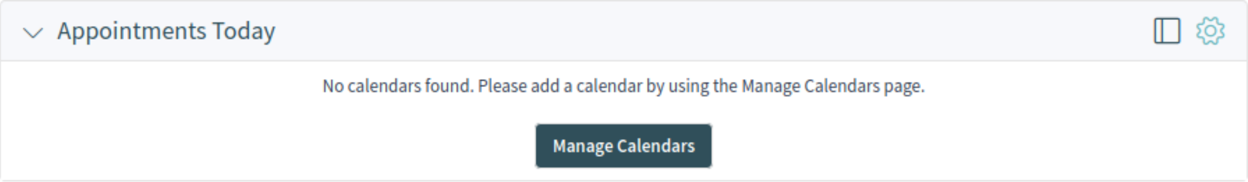
When working with customers, resource planning and scheduling can be a complex task. Appointments enable you to meet your customers where and whenever needed.

**OTRS** 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 teams' workload and prevent users from promising resources which are not available.

Use this screen to get an overview of your **OTRS** calendars. The overview screen is available in the *Calendar Overview* menu item from the main menu.

## 12.1 Calendar Widgets

**Note:** There are no calendars added by default. Please contact your administrator to add one or more calendars.



No calendars found. Please add a calendar by using the Manage Calendars page.

Fig. 1: No Calendars Found

This overview works the same as a traditional calendar. Different time periods and timelines can be selected to view appointments, and it is possible to jump between different periods.

The default installation comes with three separate widgets for daily, weekly and monthly calendar views. Basically all widgets are the same, but with different widget configurations. All widgets support agenda view, timeline view and grid view.

The display options can be changed in the widget configuration.

**Appointments Today Widget** This widget displays the appointments for a specific day.

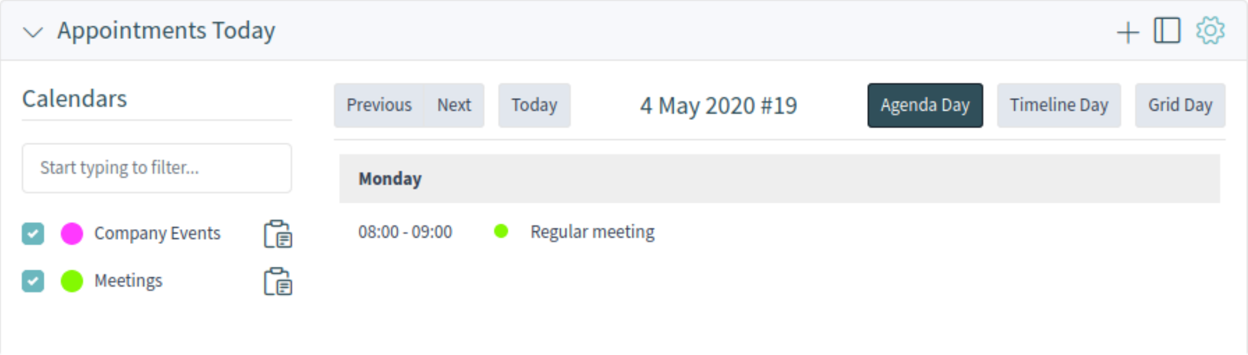

Appointments Today
Calendars
Start typing to filter...
Company Events
Meetings
Previous
Next
Today
4 May 2020 #19
Agenda Day
Timeline Day
Grid Day
Monday
08:00 - 09:00
Regular meeting

Fig. 2: Appointments Today Widget

**Appointments This Week Widget** This widget displays the appointments for a specific week.

**Appointments This Month Widget** This widget displays the appointments for a specific month.

Check or uncheck the checkboxes in the *Calendars* sidebar to show or hide appointments belonging to a specific calendar.

To view **OTRS** appointments in external calendar applications:

1. Click on the *Copy public calendar URL* icon in the *Calendars* sidebar to copy the URL to the clipboard.
2. Open your external calendar application.
3. Insert the URL into your external calendar application.

---

**Note:** If several calendars are added to the system, use the filter box to find a particular calendar. Just type the calendar name into the filter box.

---

Within the calendar overview, an agent is able to display, create, edit and/or delete appointments of different calendars, depending on their permission level related to the calendars. Appointments can be created or edited via drag and drop within this screen.

To add a new appointment:

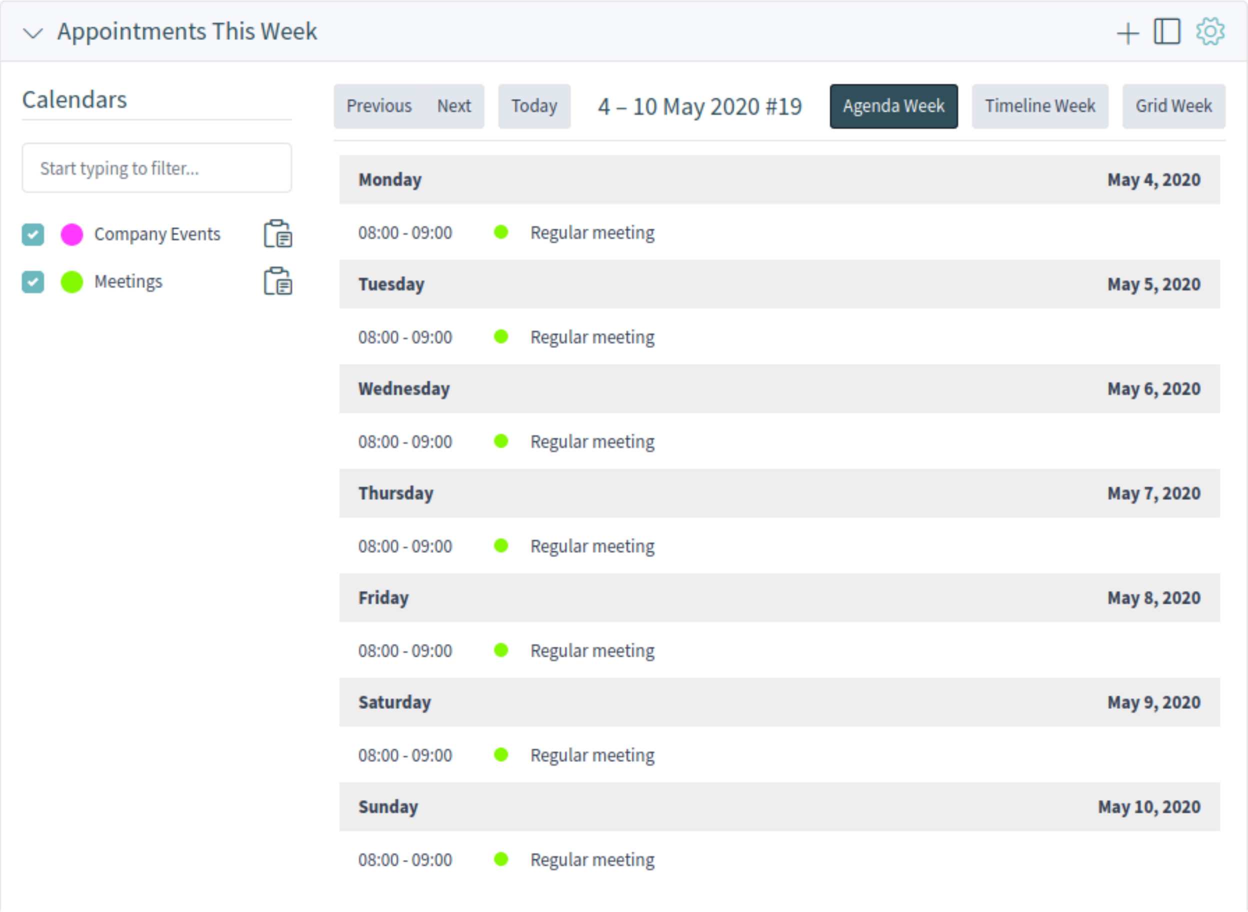
1. Click on the *Add Appointment* button in the header of the widget.
2. Fill in the required fields.
3. Click on the *Add* button.

To edit an appointment:

1. Click on an appointment in the calendar overview.
2. Modify the fields.
3. Click on the *Update* button.

To copy an appointment:

1. Click on an appointment in the calendar overview.
2. Scroll down to the bottom of the edit dialog.


Appointments This Week
Calendars
Start typing to filter...
☑ ● Company Events
☑ ● Meetings
Previous
Next
Today
4 – 10 May 2020 #19
Agenda Week
Timeline Week
Grid Week

| | |
|---|---|
| **Monday** | **May 4, 2020** |
| 08:00 - 09:00 | ● Regular meeting |
| **Tuesday** | **May 5, 2020** |
| 08:00 - 09:00 | ● Regular meeting |
| **Wednesday** | **May 6, 2020** |
| 08:00 - 09:00 | ● Regular meeting |
| **Thursday** | **May 7, 2020** |
| 08:00 - 09:00 | ● Regular meeting |
| **Friday** | **May 8, 2020** |
| 08:00 - 09:00 | ● Regular meeting |
| **Saturday** | **May 9, 2020** |
| 08:00 - 09:00 | ● Regular meeting |
| **Sunday** | **May 10, 2020** |
| 08:00 - 09:00 | ● Regular meeting |

Fig. 3: Appointments This Week Widget

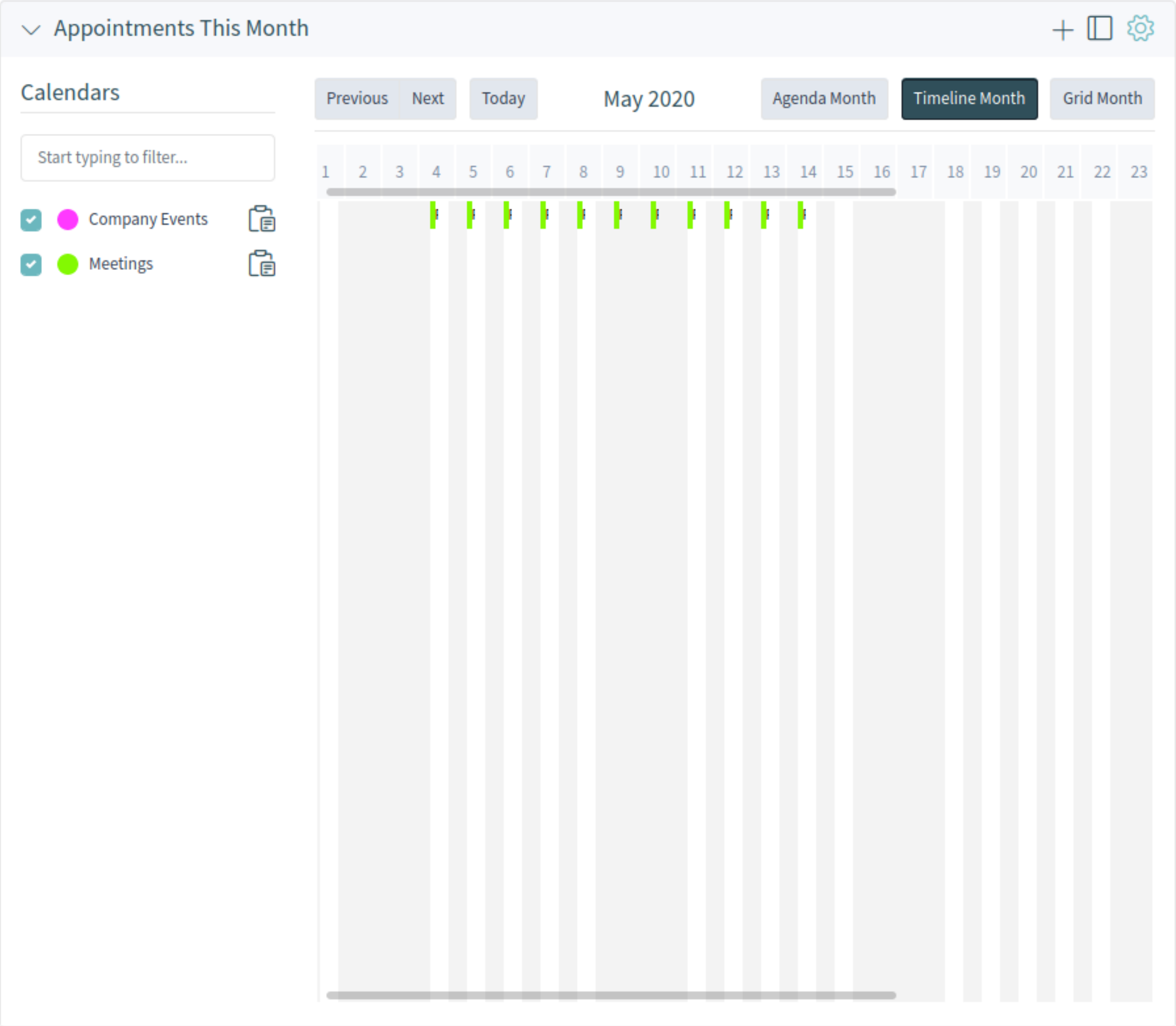

Appointments This Month
Calendars
Start typing to filter...
Company Events
Meetings
Previous
Next
Today
May 2020
Agenda Month
Timeline Month
Grid Month
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23

Fig. 4: Appointments This Month Widget

3. Click on the *Copy* button. A new appointment is created from the original one.
4. Edit the new appointment for your needs.

To delete an appointment:

1. Click on an appointment in the calendar overview.
2. Scroll down to the bottom of the edit dialog.
3. Click on the *Delete* button.
4. Click on the *Yes* button in the confirmation dialog.

## 12.2 Add Appointment

Use this dialog to add new appointments to calendars. New appointments can be added by clicking on the plus button in the header of any calendar widget. It is possible to add new appointments from the action menu too. It is also possible to drag your cursor over a time range on the calendar area to setup a rough time span for an appointment. Right after that, the *Add Appointment* dialog will appear and additional data can be inserted.

### 12.2.1 Appointment Settings

The following settings are available when adding or editing this appointment. The fields marked with an asterisk are mandatory.

**Calendar *** Select the calendar to which the appointment will be added.

**Title *** The name of the appointment. Any type of characters can be entered into this field including uppercase letters and spaces. The name will be displayed in the calendar widgets.

**Description** Add additional information to this appointment. It is recommended that you always fill this field with full sentences for better clarity.

**Location** If this field contains a value, a related link icon will show up next to the field which links to the configured map to get a better picture of the location.

> **See also:**
>
> This link is configurable through the system configuration option `AppointmentCalendar::Location::Link`.

**Resource** Resource planning is not part of the OTRS framework. Please contact us at sales@otrs.com for an upgrade.

**All day** This checkbox indicates that the appointment will take place for the whole day. If it is checked, the times of the start date and the end date will be disabled and set to 00:00.

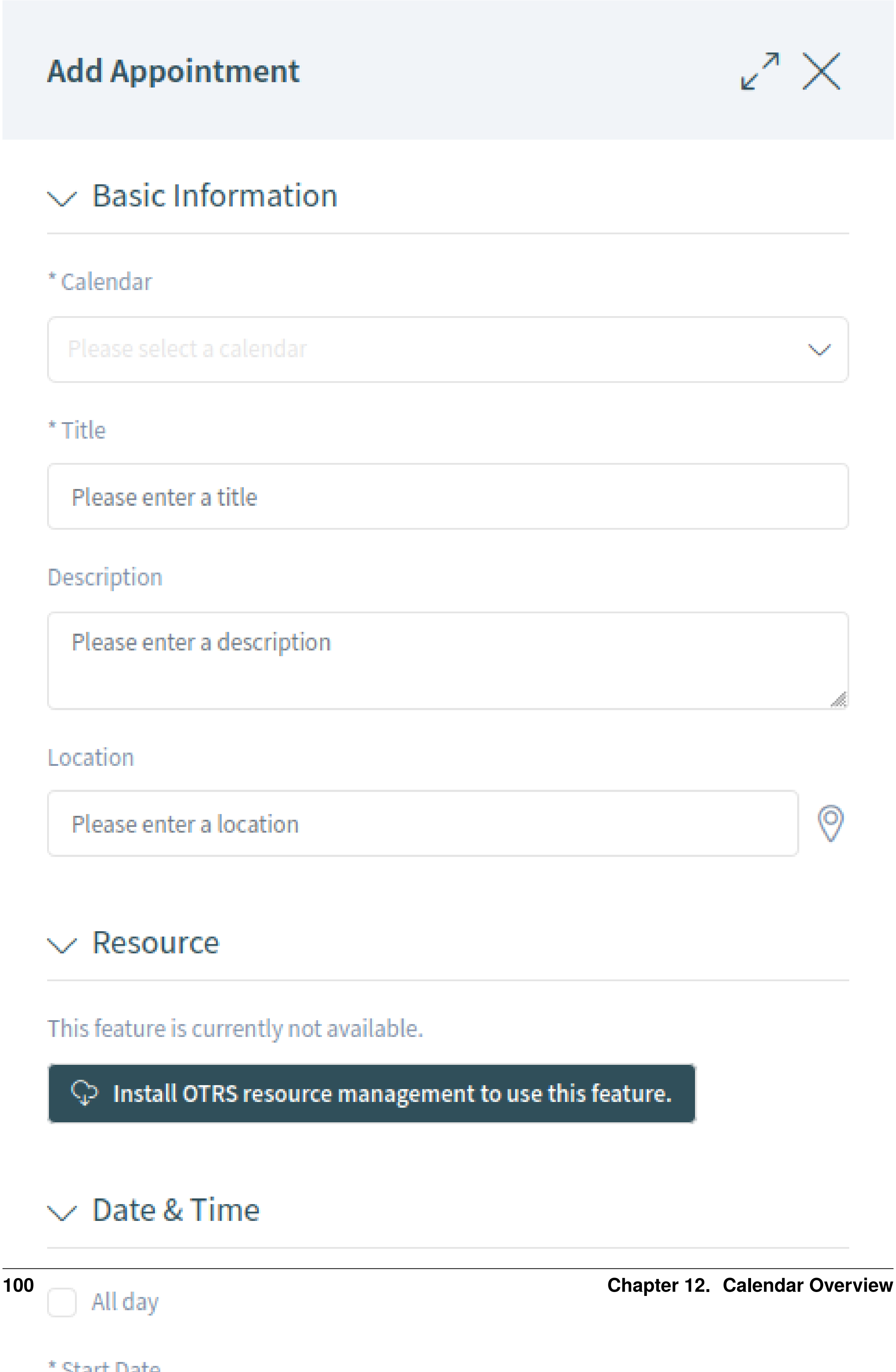
**Start date *** The start date of the appointment.

**End date *** The end date of the appointment.

**Repeat *** Define recurring appointments. This is described separately, see *Repeating Appointments* below.

**Notification *** Define time periods when an appointment notification should be sent before the appointment's start.

> **See also:**
>
> Appointment notifications can be set in the admin interface. Please contact your administrator.


Add Appointment
Basic Information
* Calendar
Please select a calendar
* Title
Please enter a title
Description
Please enter a description
Location
Please enter a location
Resource
Install OTRS resource management to use this feature.
Date & Time
☐ All day
* Start Date

This feature is currently not available.

**Linked Tickets** Tickets and other objects can be linked to the appointment with this section. Click on the *Add Ticket* button to see the ticket search.

### 12.2.2 Repeating Appointments

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

To create repeating appointments:

1. Select a *Start date* and *End date* (or check *All day*) for the first appointment in the series.
2. Select from the pre-defined occurrence frequencies in the *Repeat* field, or choose the *Custom* option.
3. Choose either a date to repeat the appointment until or a number of times to repeat it.

After all decisions are made and the settings are saved successfully, the appointment will be marked as a recurring appointment.

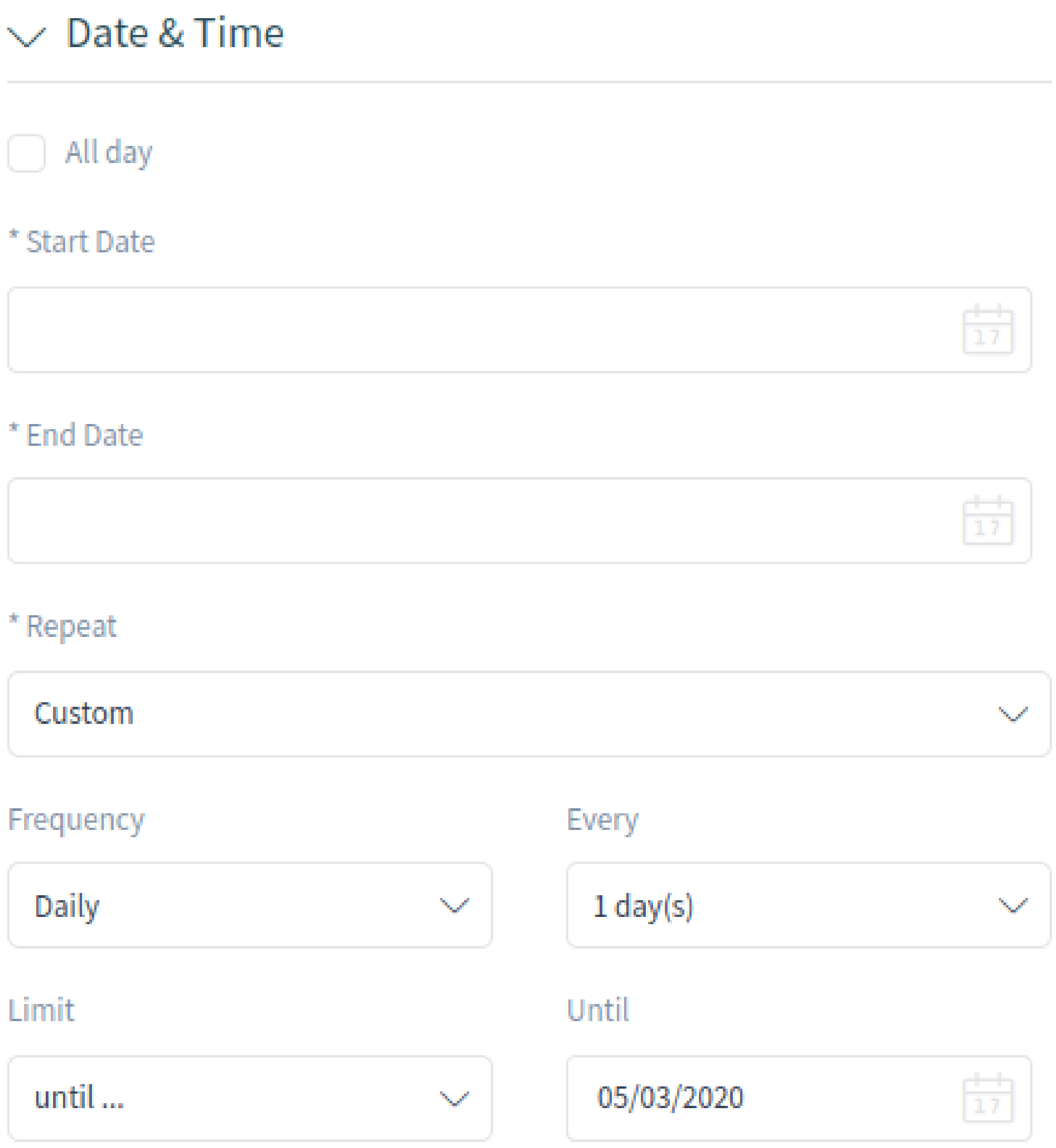
The parent appointment will be marked with an endless loop symbol, and the child appointments will have a chain symbol. This is only displayed in the appointment details when you hover the mouse over an appointment.

Future changes to the parent appointment will affect the children automatically, without any further message. If an agent is about to change one of the child appointments, a message will ask what other appointments in the series they would like to update.

If *All Occurrences* are going to be updated, the behavior will be the same as with the update of the parent appointment. All options (including the recurring settings) are changeable.

If *Just This Occurrence* will be updated, it is not possible to change the recurring settings, but a related message and a link to the parent appointment will be provided.

The enabled repeating option will be additionally displayed in the tool-tip of the related appointments.



Date & Time

☐ All day

* Start Date

* End Date

* Repeat: Custom

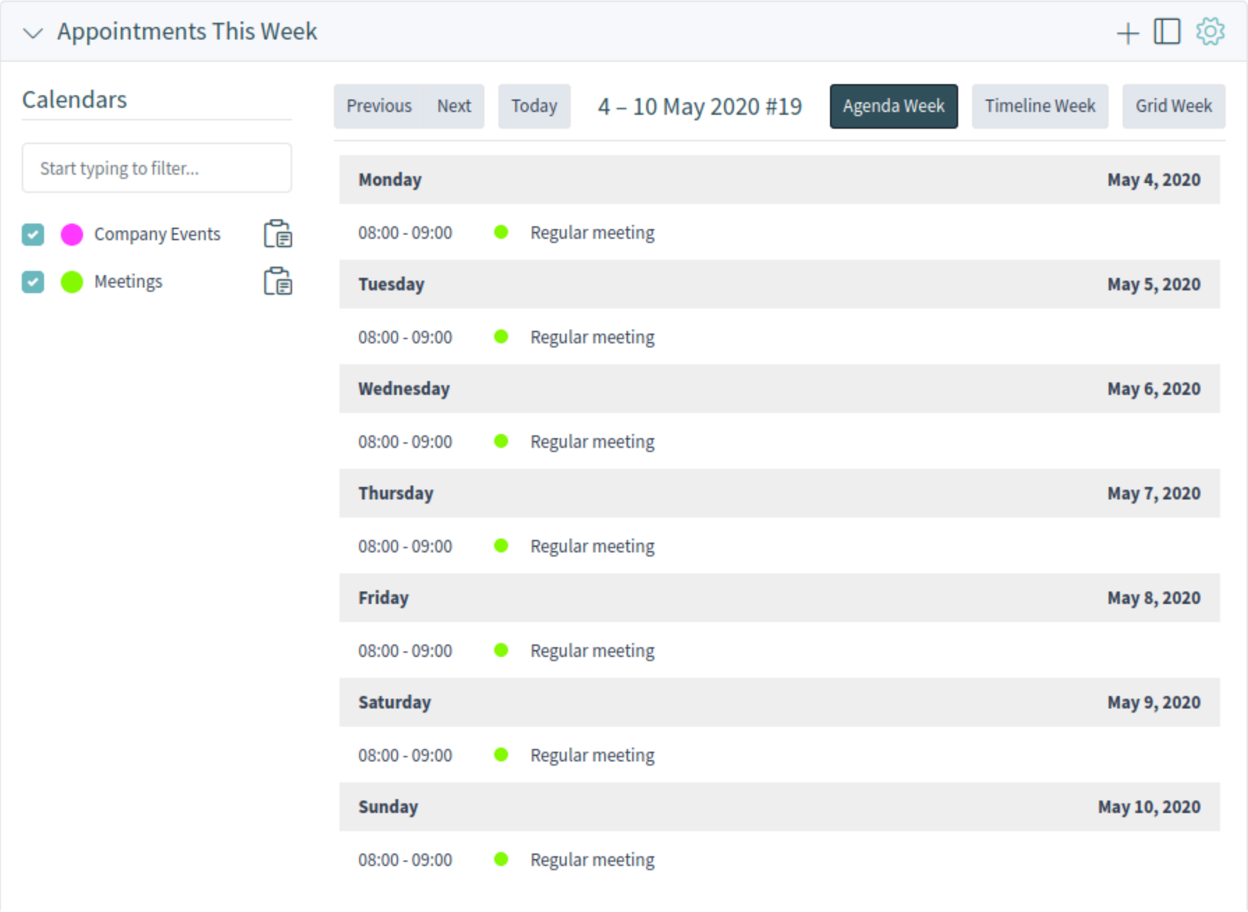
Frequency: Daily

Every: 1 day(s)

Limit: until ...

Until: 05/03/2020

Fig. 6: Repeating Appointments


Appointments This Week
Calendars
Start typing to filter...
Company Events
Meetings
Previous
Next
Today
4 – 10 May 2020 #19
Agenda Week
Timeline Week
Grid Week

**Monday** May 4, 2020

08:00 - 09:00 ● Regular meeting

**Tuesday** May 5, 2020

08:00 - 09:00 ● Regular meeting

**Wednesday** May 6, 2020

08:00 - 09:00 ● Regular meeting

**Thursday** May 7, 2020

08:00 - 09:00 ● Regular meeting

**Friday** May 8, 2020

08:00 - 09:00 ● Regular meeting

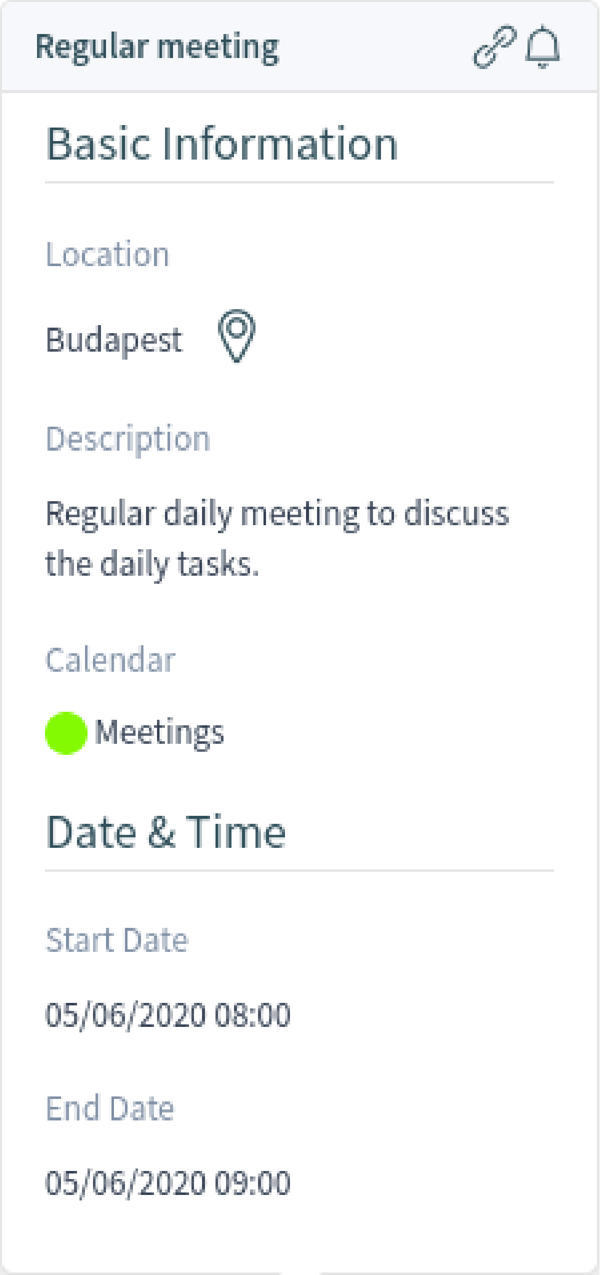
**Saturday** May 9, 2020

08:00 - 09:00 ● Regular meeting

**Sunday** May 10, 2020

08:00 - 09:00 ● Regular meeting

Fig. 7: Repeating Appointments Overview



Regular meeting

Basic Information

Location

Budapest

Description

Regular daily meeting to discuss the daily tasks.

Calendar

● Meetings

Date & Time

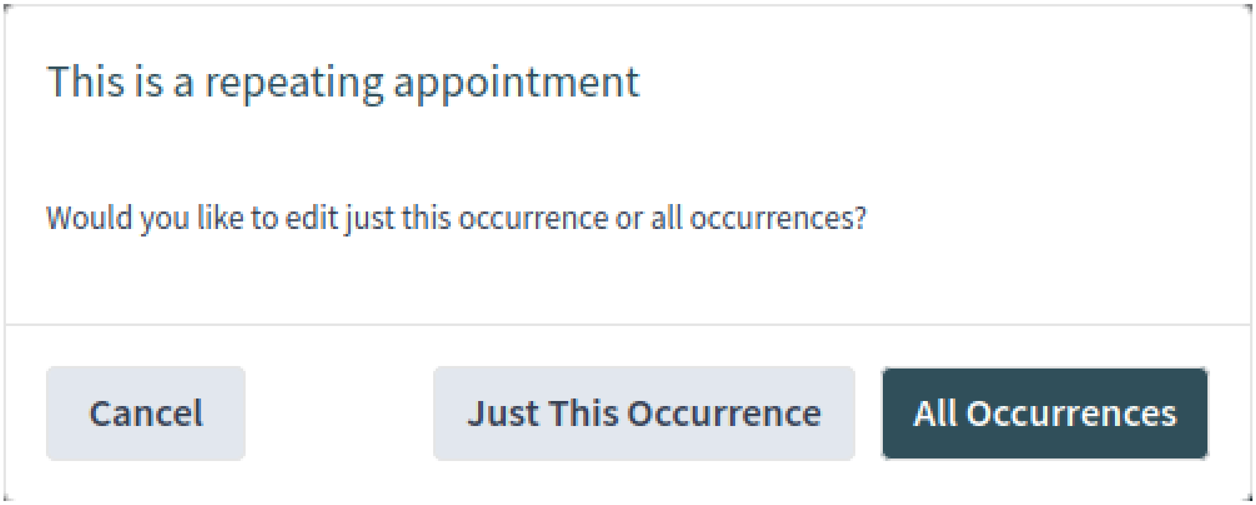
Start Date

05/06/2020 08:00

End Date

05/06/2020 09:00

Fig. 8: Repeating Appointments Details



This is a repeating appointment

Would you like to edit just this occurrence or all occurrences?

Cancel
Just This Occurrence
All Occurrences

Fig. 9: Edit Repeating Appointment

# CHAPTER 13

# Chat

The chat feature allows for chats between agents and customers using the OTRS front end. Once enabled, customers or public users can start chats with agents and vice versa. Finished chats can be archived and attached to tickets or can be downloaded as PDF by agents, customers and public users.

Each chat is assigned to a chat channel. Chat channels are like chat rooms. Each chat channel is assigned to a certain group which controls the permissions for this channel. If no chat channel is selected when a chat is created, this chat will be created in the *Default channel*.

## 13.1 Chat Availability

To be able to use chats, chat availability needs to be set in the *Personalization* menu. In order to accept incoming chat requests from customer users, one or more chat channels must be selected in the *My Chat Channels* field of the *Notification Settings*.

The *People* widget shows the online and chat availability status for agents and customer users. A third screen shows users that are out of office.

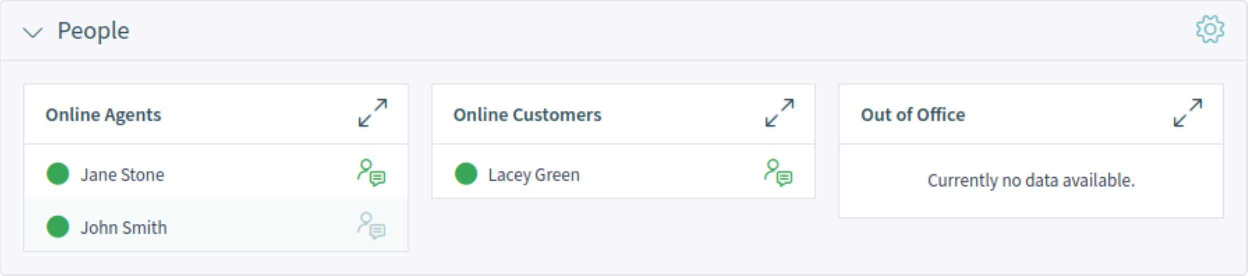


Fig. 1: People Widget

Every user has a colored circle icon after his/her name in the *People* widget which represents the person’ s availability.

**Green circle** The user is online and available for chats.

**Yellow circle** The user is away. There has not been a request sent to the server from this user for some time.

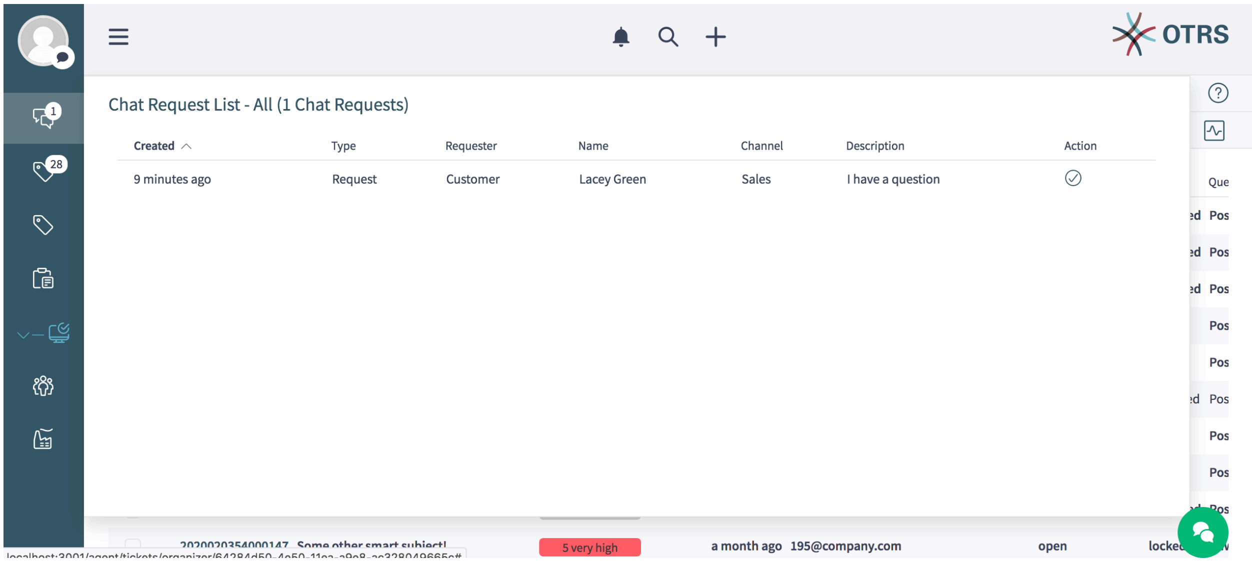
**Pink circle** The user is inactive. A chat request has not been accepted or the participant left the chat.

**Red circle** The user is set as unavailable for chats in the *Personalization* menu.

**Black circle** The user has logged out or the session has expired.

## 13.2 Chat Request List

The chat request list displays chat requests from customer users, public users and other agents. The list is accessible by hovering over the chat symbol in the organizer sidebar.



Chat Request List - All (1 Chat Requests)

| Created | Type | Requester | Name | Channel | Description | Action |
|---|---|---|---|---|---|---|
| 9 minutes ago | Request | Customer | Lacey Green | Sales | I have a question | ✓ |

Fig. 2: Chat Request List

To accept the chat request, click on the *Accept* icon in the *Action* column.

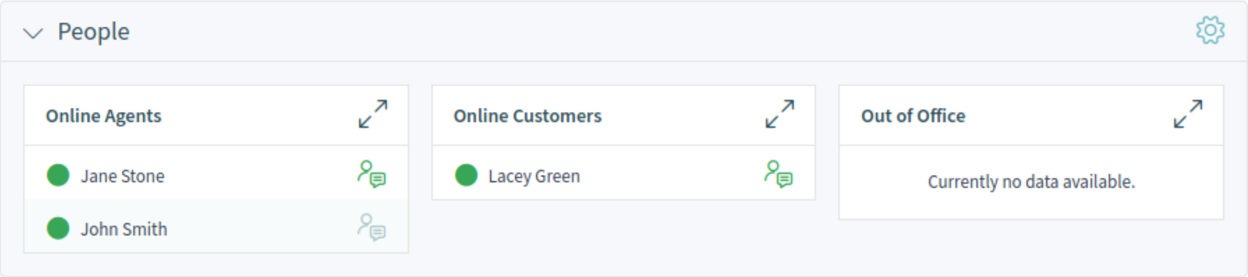
## 13.3 Start New Chat

A chat participant can be an agent, a customer user or a public user.

### 13.3.1 Agent to Agent

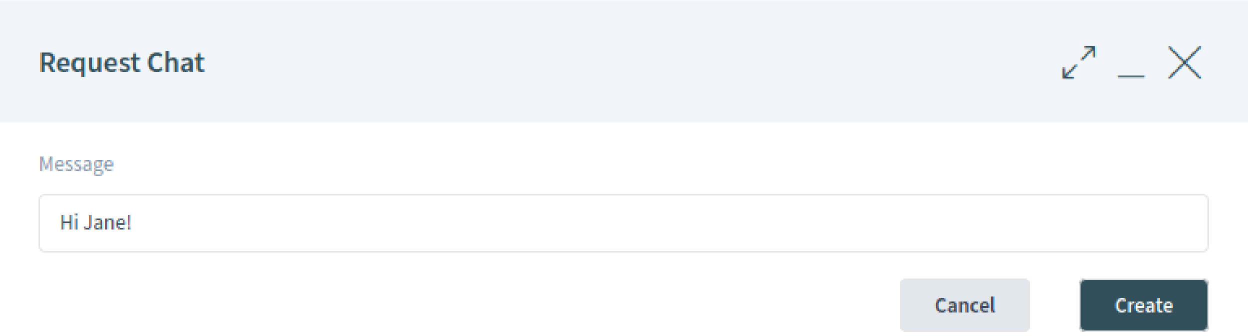
To start a chat with another agent:

1. Use the *People* widget in the dashboard. Agents who are able to chat will have a chat icon next to their name.
2. Click on the chat icon next to an agent’ s name.
3. Type an initial message in the *Request Chat* dialog, and click on the *Create* button to send the message.


People
Online Agents
Jane Stone
John Smith
Online Customers
Lacey Green
Out of Office

Currently no data available.

Fig. 3: Available Agents


Request Chat
Cancel
Create

Message: Hi Jane!

Fig. 4: Request Chat Dialog

4. After the chat request has been sent to the other agent, you will see a chat indicator in the organizer sidebar. A browser notification is displayed to inform the other agent of the chat request.
5. Wait for the answer. The other agent has to accept the chat request with the *Accept* button.
6. When the other agent accepts the chat request, you can chat now.

### 13.3.2 Agent to Customer User

To start a chat with a customer user:

1. Use the *People* widget in the dashboard. Customer users who are logged in to the OTRS external interface and are able to use the chat will have a chat icon next to their name.

   **See also:**

   Customer users can also be selected in the customer user detail view or from the *Customer User Information* widget of the ticket detail view.

2. Click on the chat icon next to a customer' s user name.
3. Type an initial message in the *Request Chat* dialog, and click on the *Create* button to send the message.
4. After the chat request has been sent to the customer user, a chat indicator will appear in the organizer sidebar. A browser notification is displayed to inform the customer user about the request.
5. Wait for the answer. The customer user has to accept the chat request which is displayed in the bottom right corner of the external interface.
6. When the customer user accepts the chat request, you can chat now.
7. When the customer user closes the chat, it is possible to send the chat contents via email or create a ticket from the conversation.

### 13.3.3 Customer User to Agent

Customer users are not able to start a chat directly with a certain agent, but can only create generic chat requests.

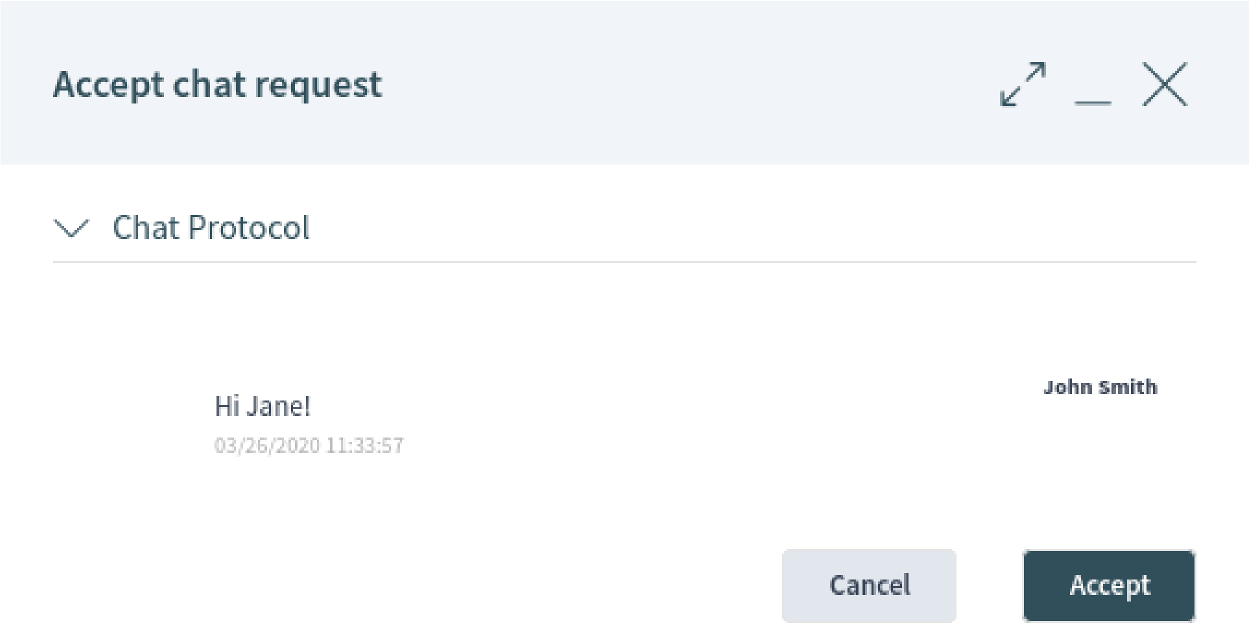
To receive a chat request from a customer user:

1. A customer user must login to the OTRS external interface and click on the *New conversation* button within the chat window in the bottom right corner of the external interface.
2. A notification is displayed in the organizer sidebar to inform the agent. Hover the mouse over the chat icon to open the chat requests list.
3. Accept the chat request.
6. When an agent accepts the chat request, they can chat now.
7. The customer user will see the answer.

### 13.3.4 Public User to Agent

Visitors of the external interface are also not able to start a chat directly with a certain agent, but can only create generic chat requests. As they are not logged in, they need to add a name to start the chat.

The remaining steps are the same as described in the *Customer User to Agent* section.

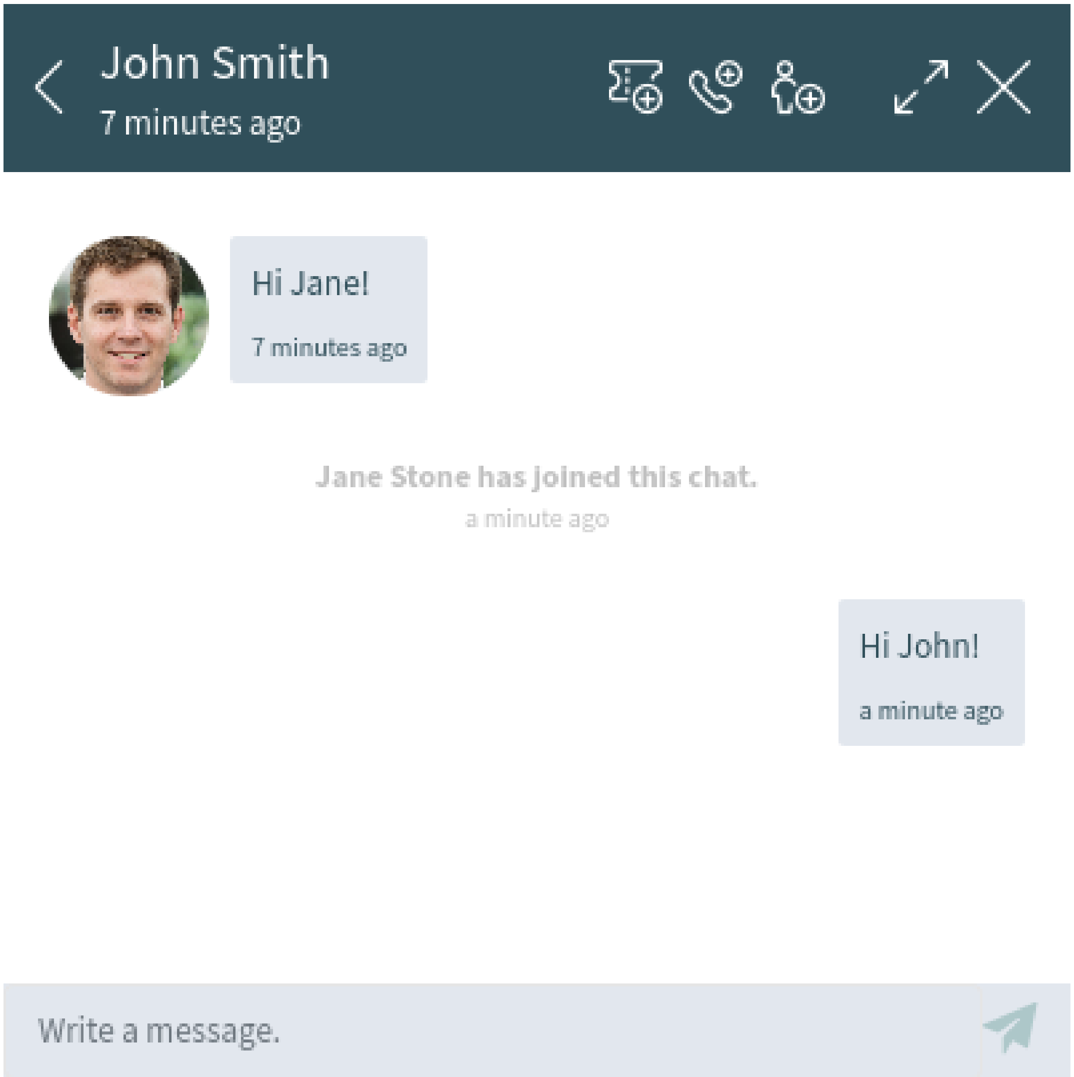

Accept chat request
Chat Protocol
Cancel
Accept

John Smith

Hi Jane!

03/26/2020 11:33:57

Fig. 5: Accept Chat Request Dialog



John Smith

7 minutes ago

Hi Jane!

7 minutes ago

Jane Stone has joined this chat.

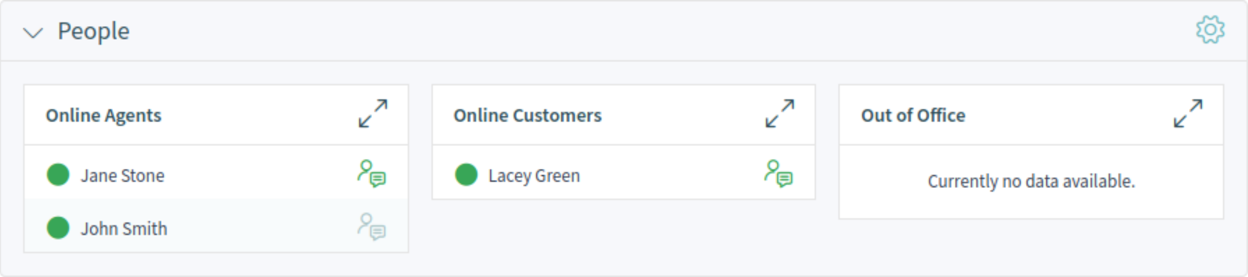
a minute ago

Hi John!

a minute ago

Write a message.

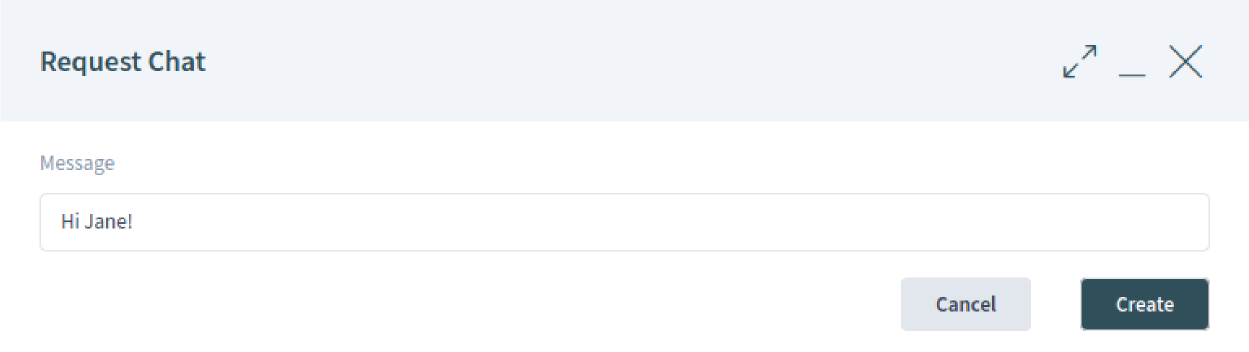
Fig. 6: Agent to Agent Chat



People
Online Agents
Jane Stone
John Smith
Online Customers
Lacey Green
Out of Office

Currently no data available.

Fig. 7: Available Customer Users

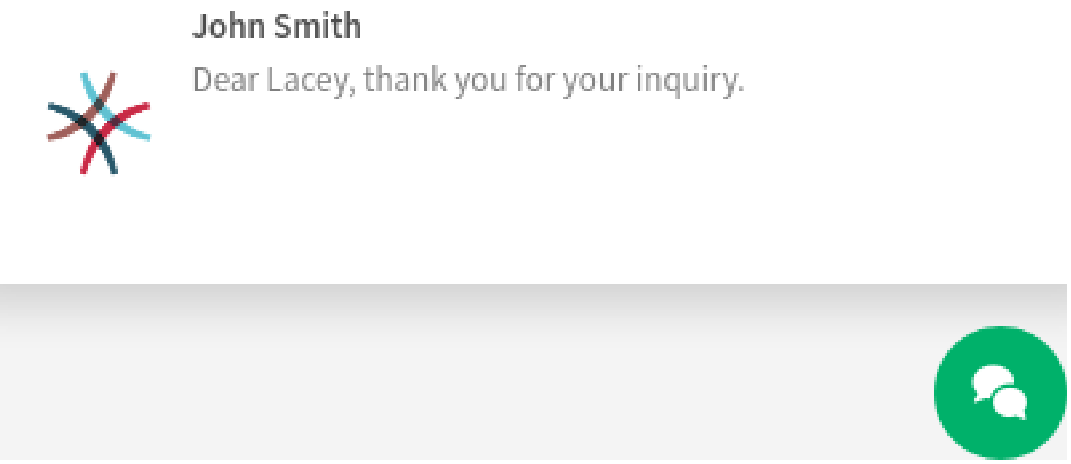


Request Chat

Message

Hi Jane!

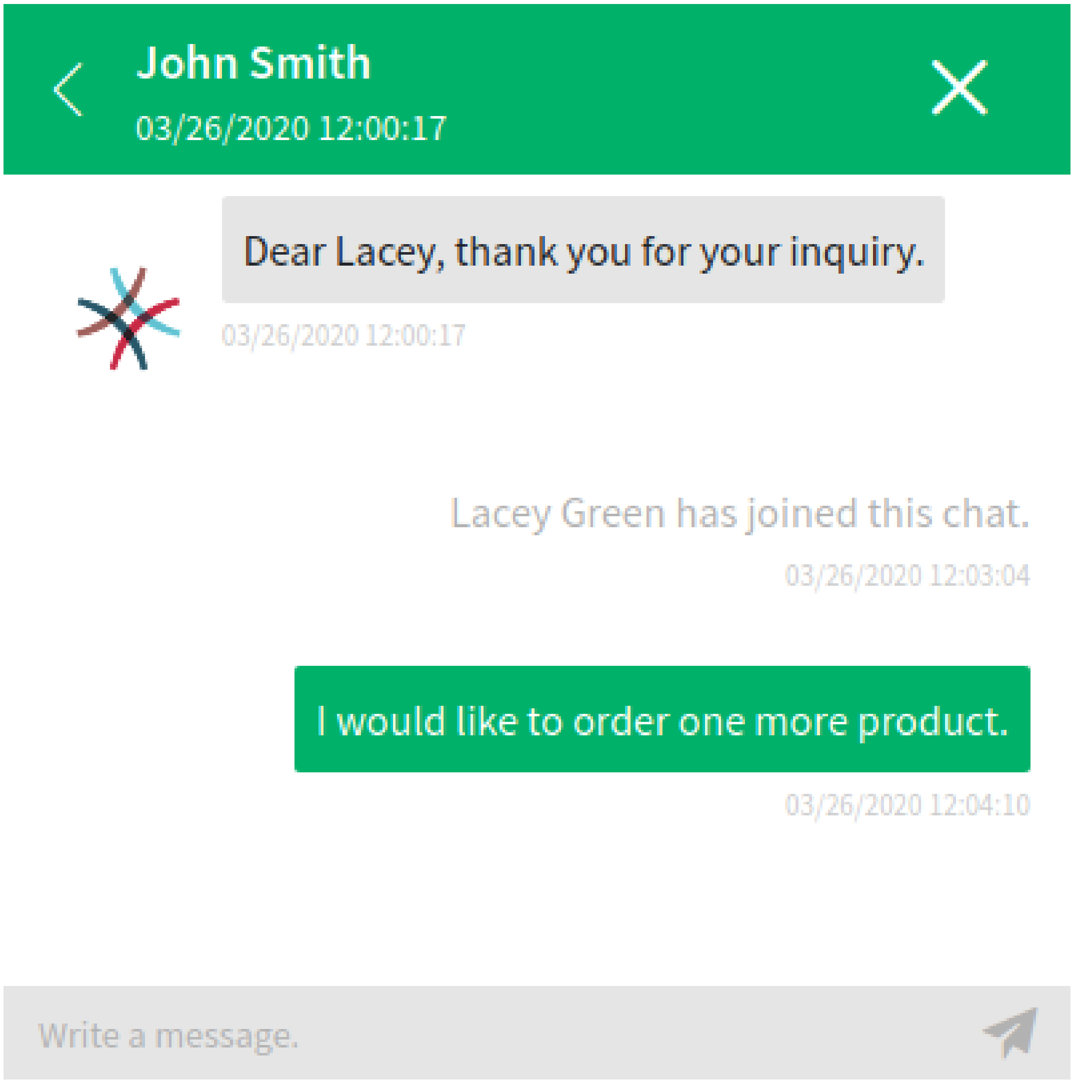
Fig. 8: Request Chat Dialog



John Smith

Dear Lacey, thank you for your inquiry.

Fig. 9: Chat Request on External Interface



John Smith

03/26/2020 12:00:17

Dear Lacey, thank you for your inquiry.

03/26/2020 12:00:17

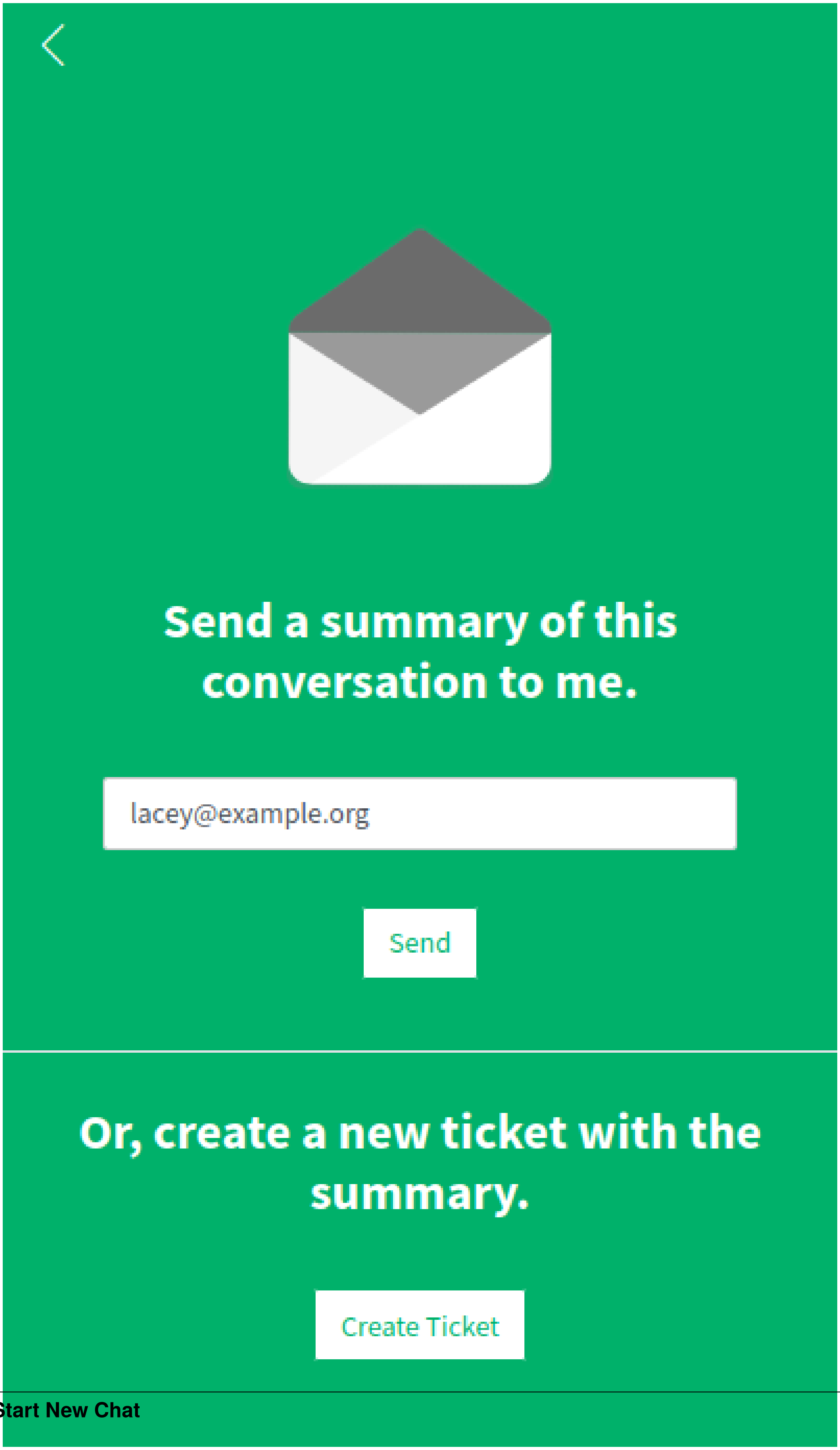
Lacey Green has joined this chat.

03/26/2020 12:03:04

I would like to order one more product.

03/26/2020 12:04:10

Fig. 10: Agent to Customer User Chat

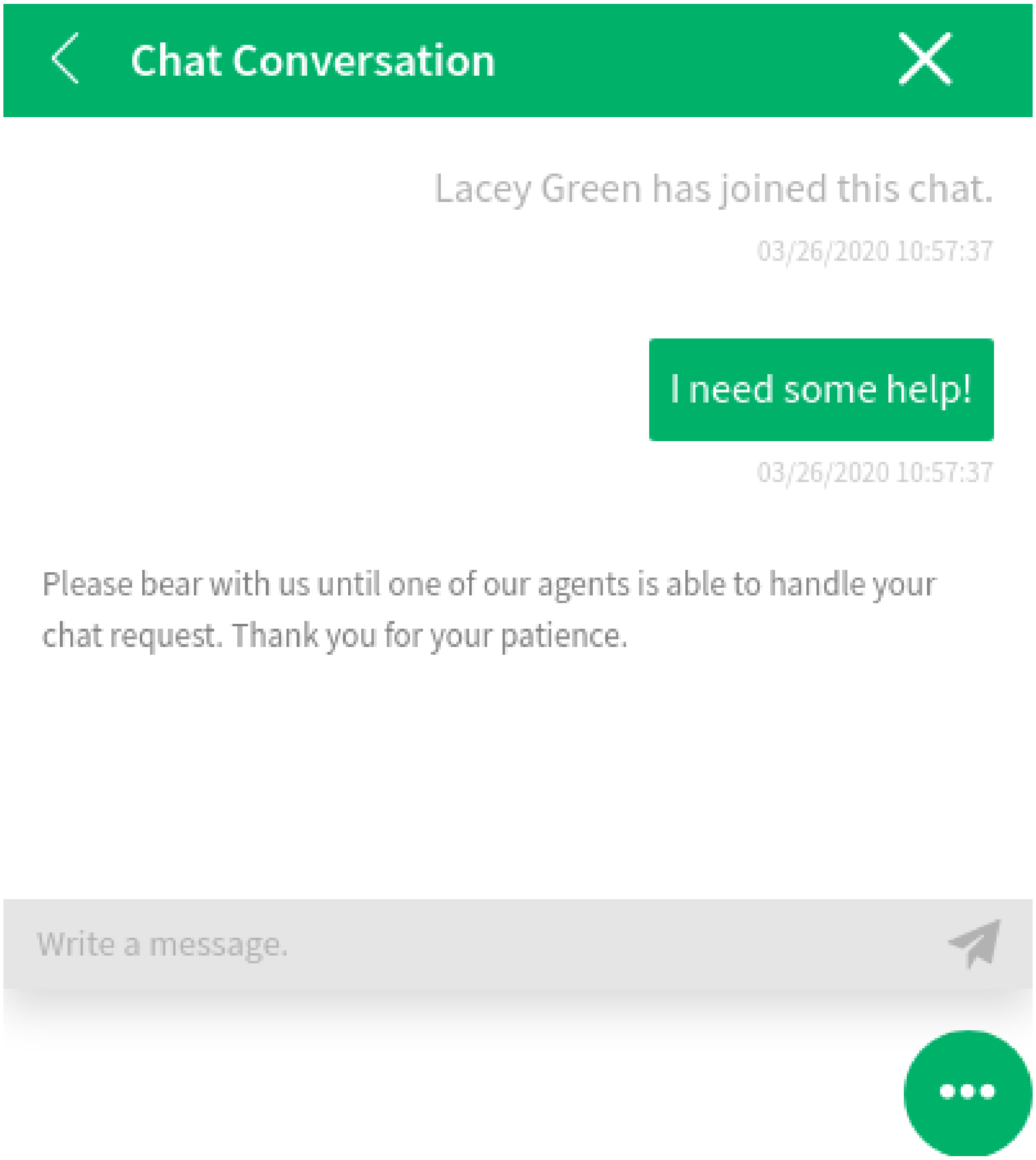


Send a summary of this conversation to me.

lacey@example.org

Or, create a new ticket with the summary.

Fig. 11: Save the Conversation on External Interface


Chat Conversation

Lacey Green has joined this chat.

03/26/2020 10:57:37

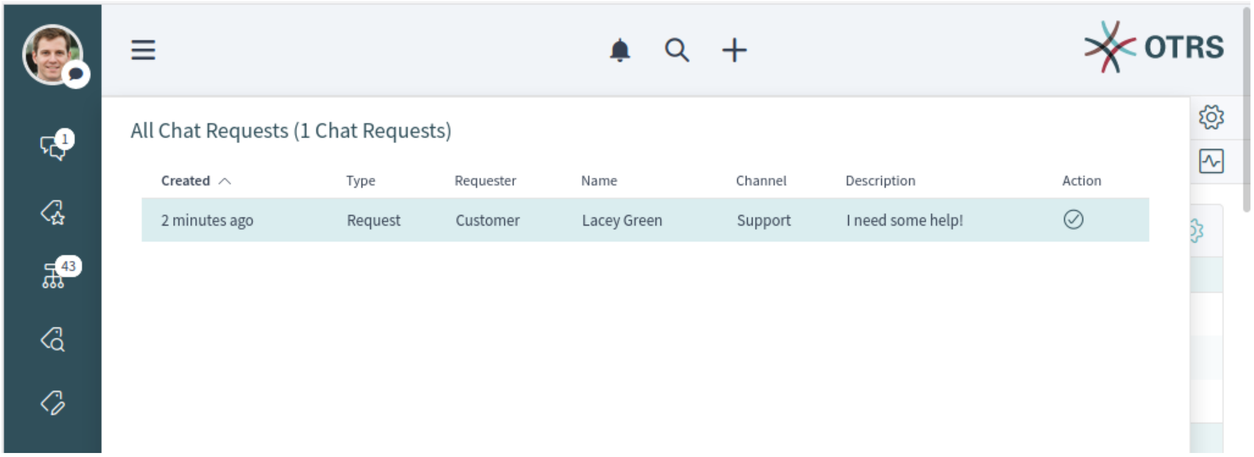
I need some help!

03/26/2020 10:57:37

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

Write a message.

Fig. 12: Start Chat Window



All Chat Requests (1 Chat Requests)

| Created | Type | Requester | Name | Channel | Description | Action |
|---|---|---|---|---|---|---|
| 2 minutes ago | Request | Customer | Lacey Green | Support | I need some help! | ✓ |

Fig. 13: General Chat Requests From Customers Widget

## 13.4 Chat Bubble

Clicking on the conversations icon in the bottom right corner opens the list of conversations. This chat widget is the main component used when chatting with other people. It provides a history of all messages in the chat as well as a list of possible available actions, depending on your permission level.

The messages can be sent using the text field of a chat in the *Conversation(s)* widget by either clicking the send icon next to the text field or hitting the Enter key. Shift + Enter can be used to insert a new line into the message.

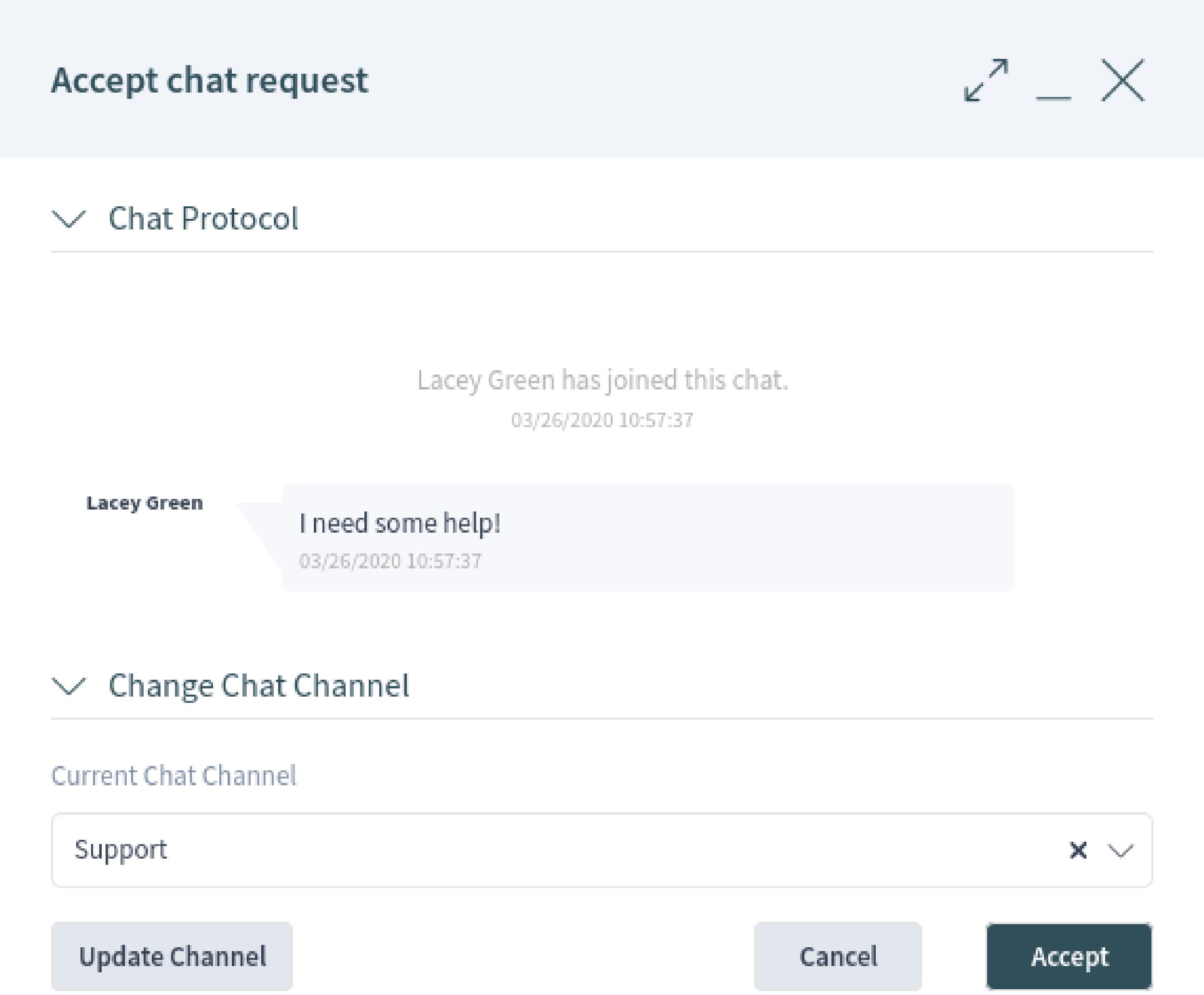
The chat widget has some icons in the header bar.

The menu has several menu items.

**Append to ticket** Allows you to append this chat as an article to a selected ticket. After the article has been created, the chat will get closed automatically.

**Create phone ticket** Allows you to create a phone ticket to which the current chat will be appended to as an article. After the ticket has been successfully created, the chat will get closed automatically. The phone ticket is explained in the *Tickets* chapter.

**Invite** Allows you to invite another agent to this chat. You can select who you want to invite from a list of available agents. Once the agent has been invited, a new invitation request will be sent to this agent. After the request has accepted, the new agent will join the conversation.

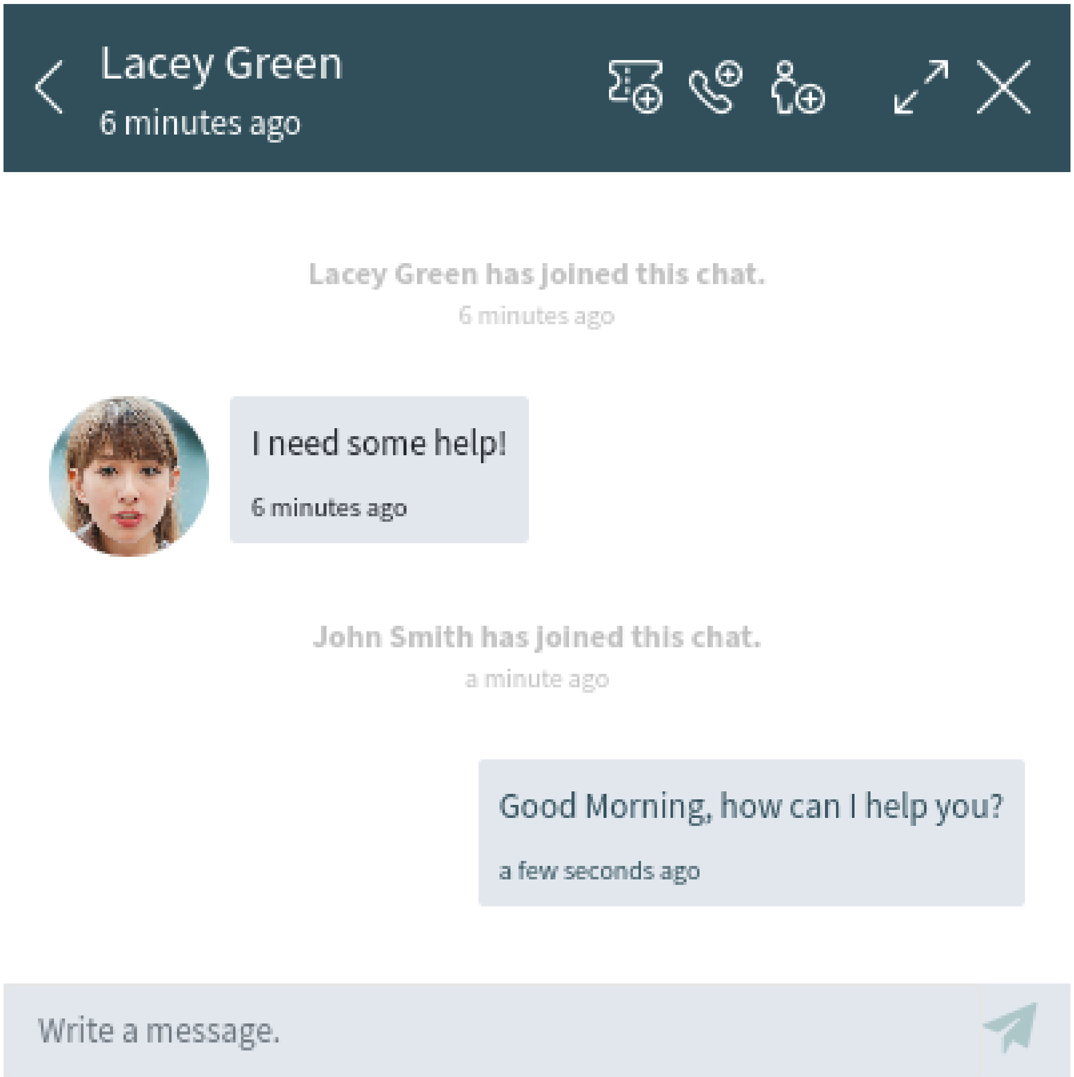

Accept chat request
Chat Protocol
Change Chat Channel
Update Channel
Cancel
Accept

Lacey Green has joined this chat.
03/26/2020 10:57:37

**Lacey Green**
I need some help!
03/26/2020 10:57:37

Current Chat Channel: Support

Fig. 14: Chat Preview Dialog



Lacey Green
6 minutes ago

Lacey Green has joined this chat.
6 minutes ago

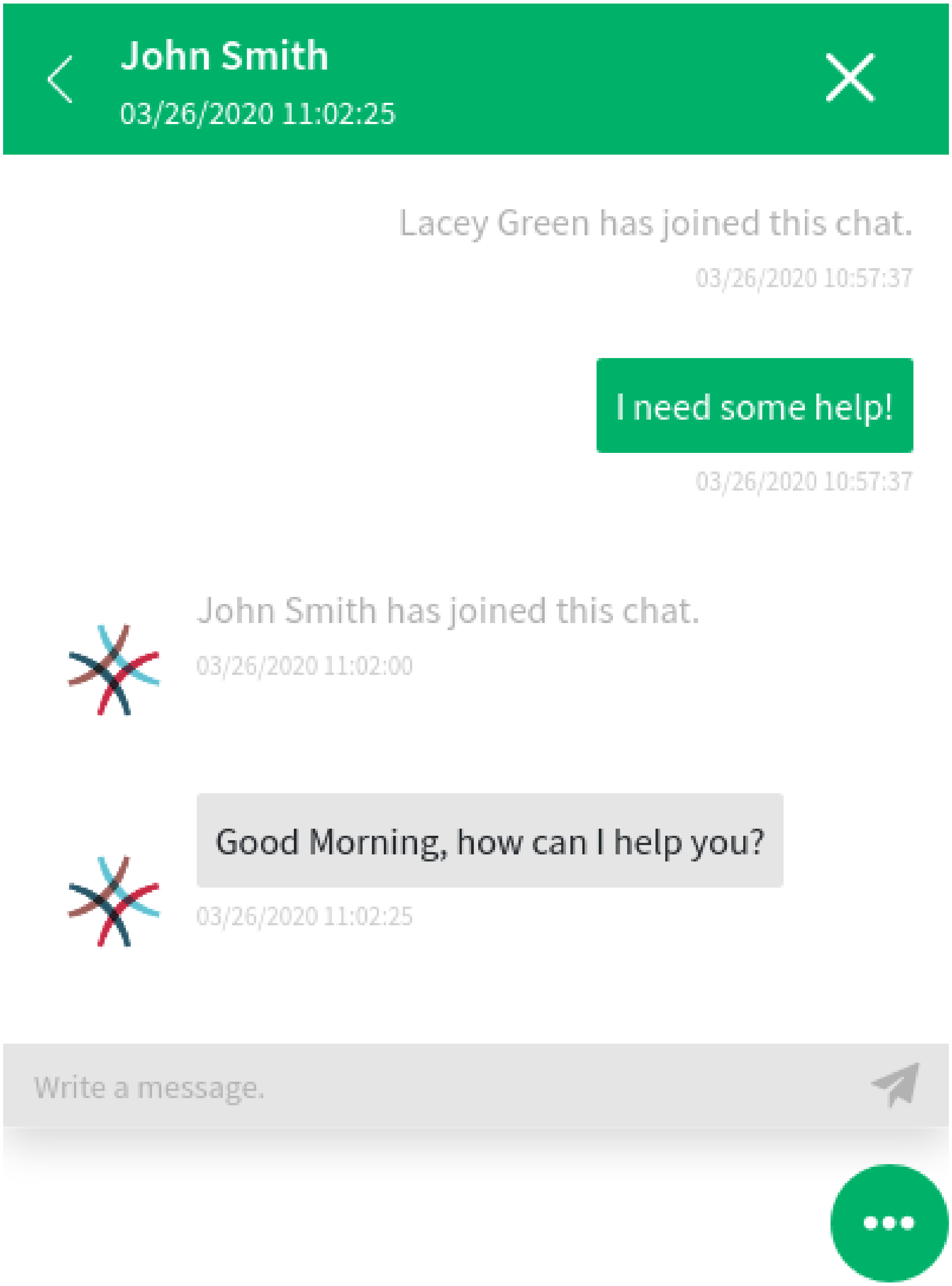
I need some help!
6 minutes ago

John Smith has joined this chat.
a minute ago

Good Morning, how can I help you?
a few seconds ago

Write a message.

Fig. 15: Customer User to Agent Response



John Smith

03/26/2020 11:02:25

Lacey Green has joined this chat.

03/26/2020 10:57:37

I need some help!

03/26/2020 10:57:37

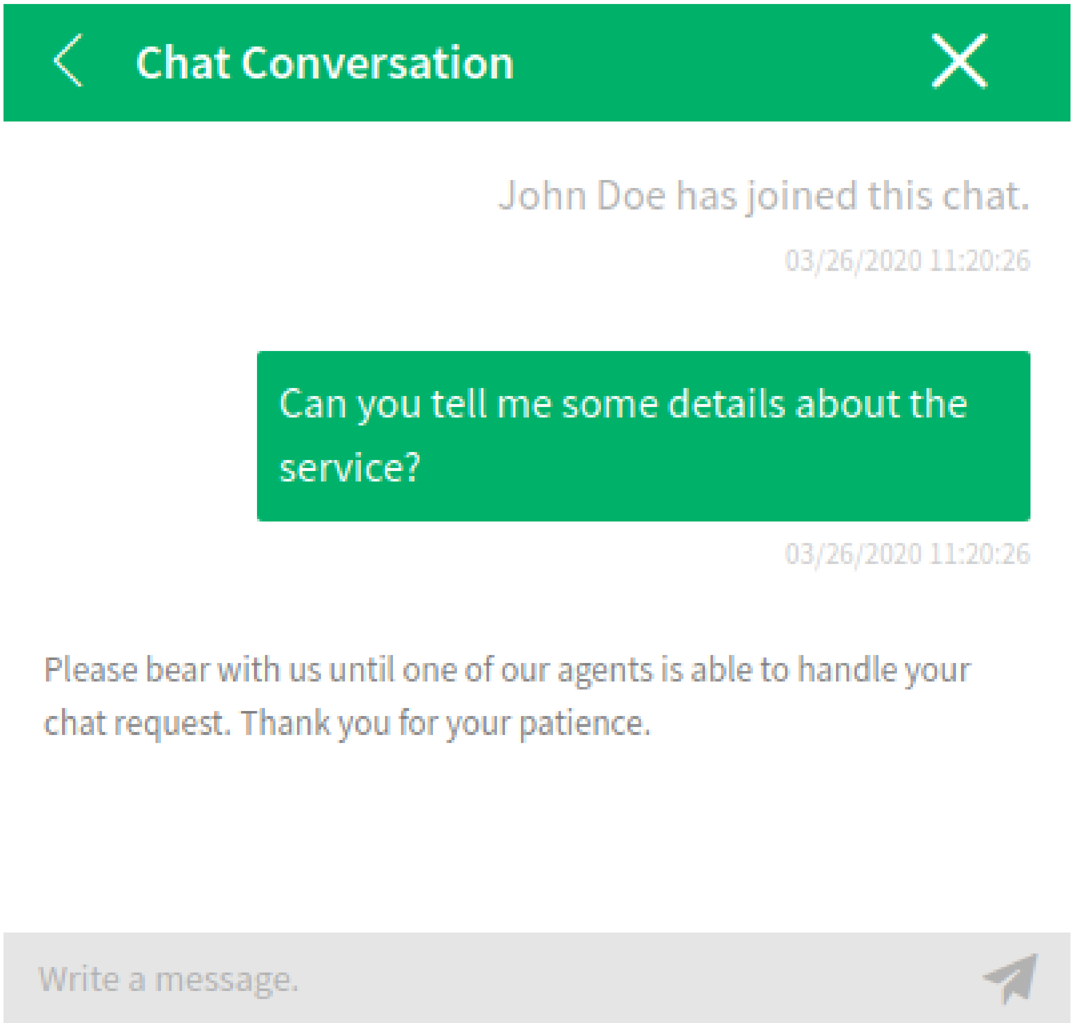
John Smith has joined this chat.

03/26/2020 11:02:00

Good Morning, how can I help you?

03/26/2020 11:02:25

Fig. 16: Customer User Chat


Chat Conversation

John Doe has joined this chat.

03/26/2020 11:20:26

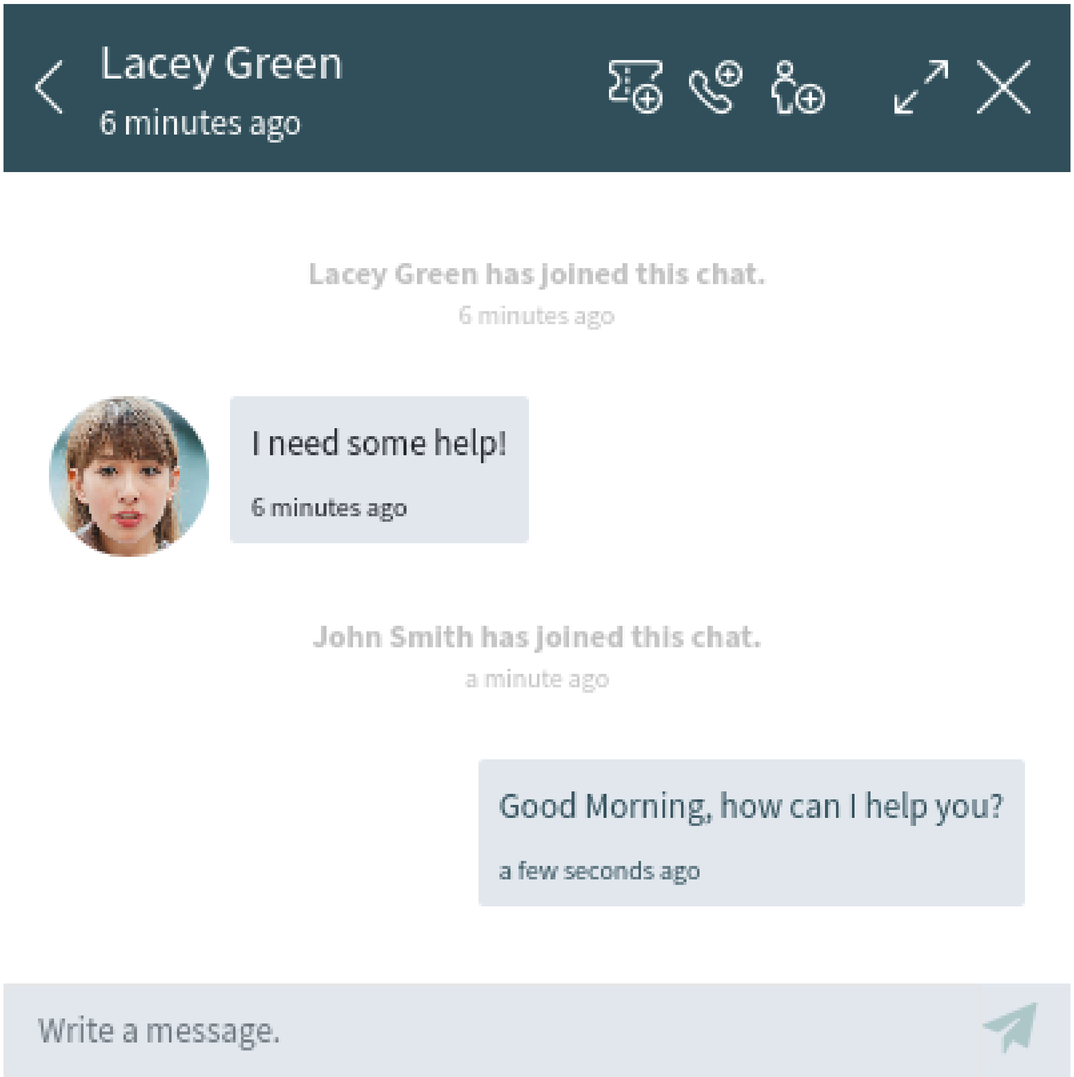
Can you tell me some details about the service?

03/26/2020 11:20:26

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

Write a message.

Fig. 17: Start Chat Window



Lacey Green

6 minutes ago

Lacey Green has joined this chat.

6 minutes ago

I need some help!

6 minutes ago

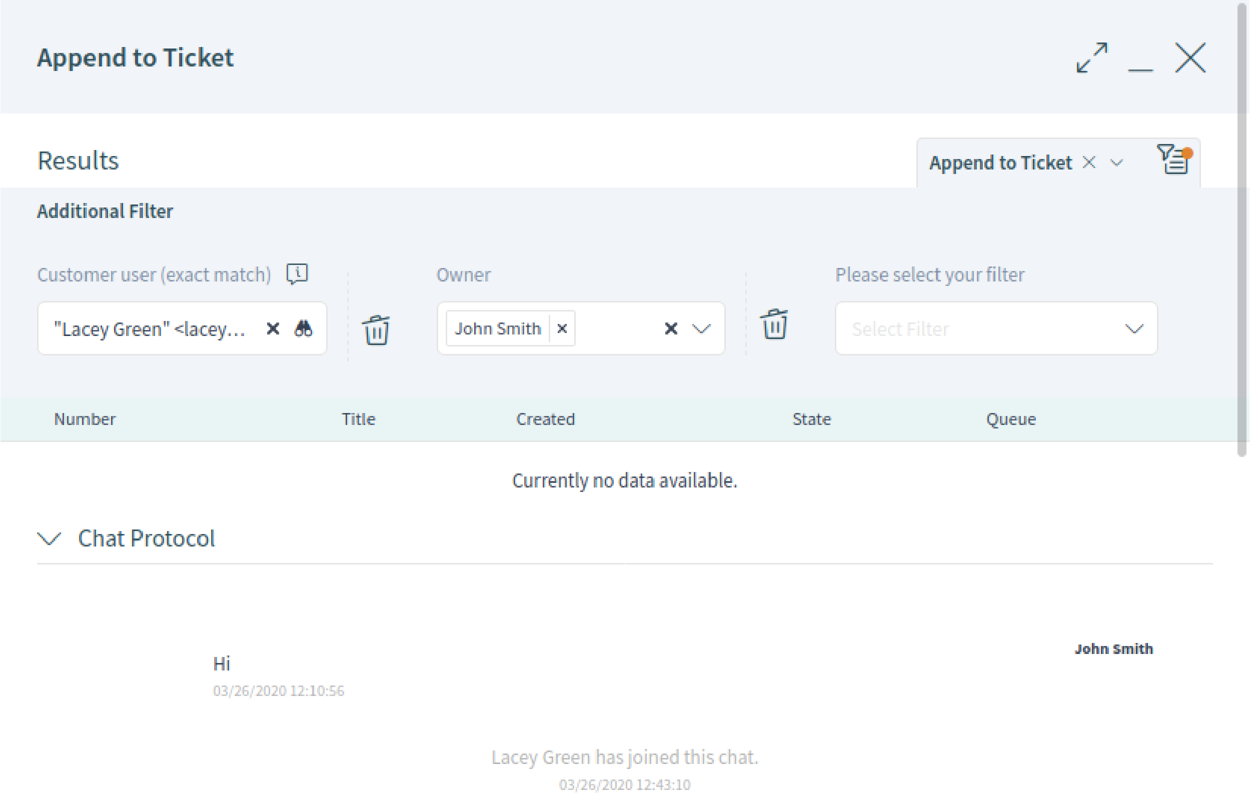
John Smith has joined this chat.

a minute ago

Good Morning, how can I help you?

a few seconds ago

Fig. 18: Chat Widget



Append to Ticket

Results

Additional Filter

Customer user (exact match): "Lacey Green" <lacey…

Owner: John Smith

Please select your filter: Select Filter

| Number | Title | Created | State | Queue |
|---|---|---|---|---|

Currently no data available.

Chat Protocol

John Smith

Hi

03/26/2020 12:10:56

Lacey Green has joined this chat.

03/26/2020 12:43:10

Fig. 19: Append to Ticket

# CHAPTER 14

## Social Media Channels

This function extends **OTRS** with additional communication channels for social media and connects **OTRS** with the following social media platforms:

- Facebook
- LinkedIn
- Twitter

Page posts or tweets can be created via **OTRS** and can be managed as tickets. Public comments to a post or a tweet that is connected with a ticket appear as incoming articles in OTRS tickets. This allows to manage communication on social media platforms with OTRS and even to manage different social media channels in one ticket.

**Note:** This feature is available only for managed customers. A special contract is needed to use this feature.

**Note:** In order to use this feature a system administrator needs to setup the related social media profile configuration first.

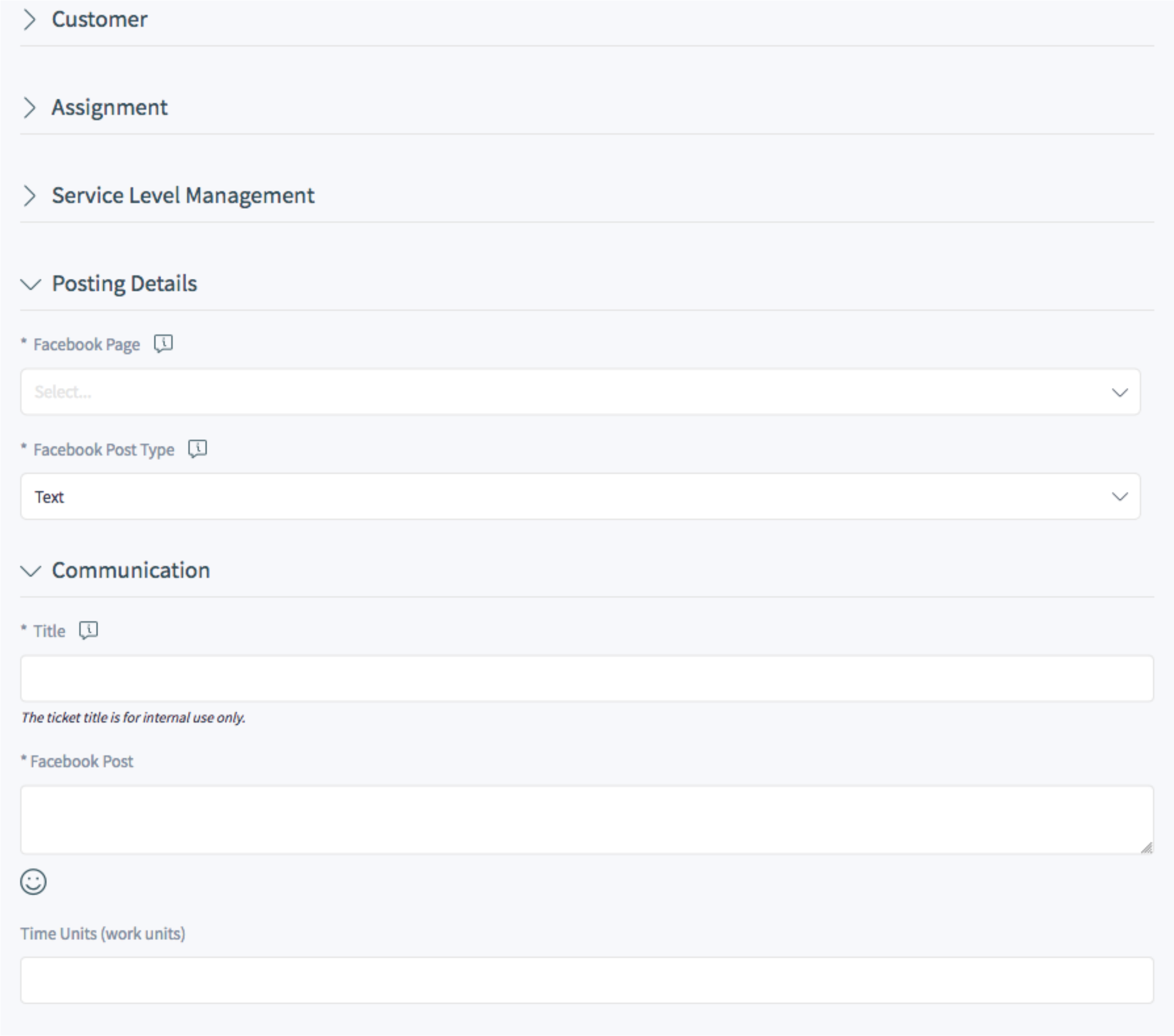
### 14.1 Facebook

To create a Facebook page post ticket:

1. Go to the main menu and select *Create Facebook Post*.
2. Fill in the fields.

   For Facebook posts tickets there is an additional section *Posting Details* at the ticket create screen and the section *Communication* is different:

3. Select a Facebook page in the *Posting Details* section.



Customer
Assignment
Service Level Management
Posting Details

* Facebook Page

Select...

* Facebook Post Type

Text

Communication

* Title

*The ticket title is for internal use only.*

* Facebook Post

Time Units (work units)

Fig. 1: Create Facebook Page Post Ticket

4. Select the Facebook post type.
5. Write the title of the Facebook post in the *Communication* section.
6. Write the content of the message.
7. Click on the *Create* button after all relevant fields are filled.

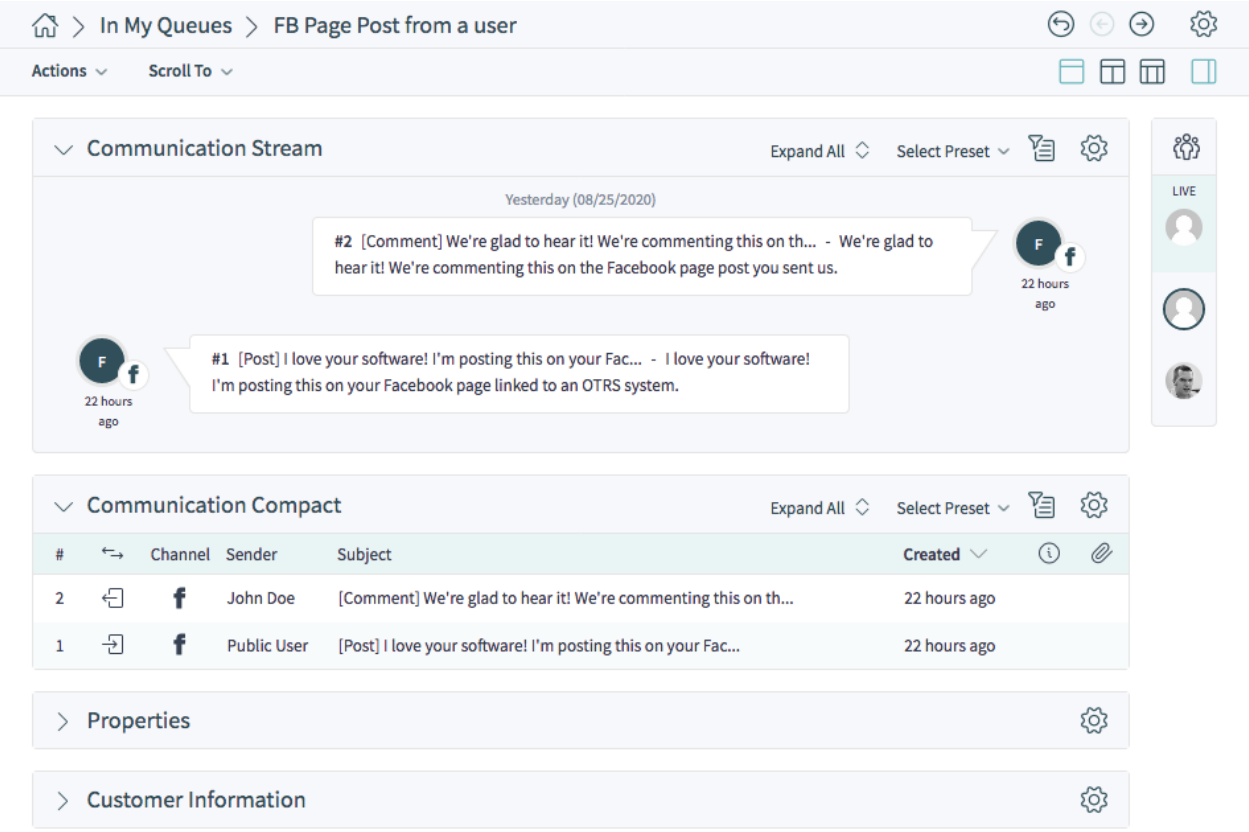
This creates a Facebook post and a ticket in **OTRS** containing the Facebook post as first article.

---

**Note:** The ticket detail view for Facebook post tickets contains an additional widget *Facebook Page History*. This widget shows all Facebook page posts that have been created for the selected Facebook page.

---

If a public user publishes a post on a configured Facebook page a new ticket will be created in **OTRS**.



**#2** [Comment] We're glad to hear it! We're commenting this on th... - We're glad to hear it! We're commenting this on the Facebook page post you sent us.

**#1** [Post] I love your software! I'm posting this on your Fac... - I love your software! I'm posting this on your Facebook page linked to an OTRS system.

| # | | Channel | Sender | Subject | Created |
|---|---|---|---|---|---|
| 2 | | f | John Doe | [Comment] We're glad to hear it! We're commenting this on th... | 22 hours ago |
| 1 | | f | Public User | [Post] I love your software! I'm posting this on your Fac... | 22 hours ago |

Fig. 2: Facebook Page Post from Public User

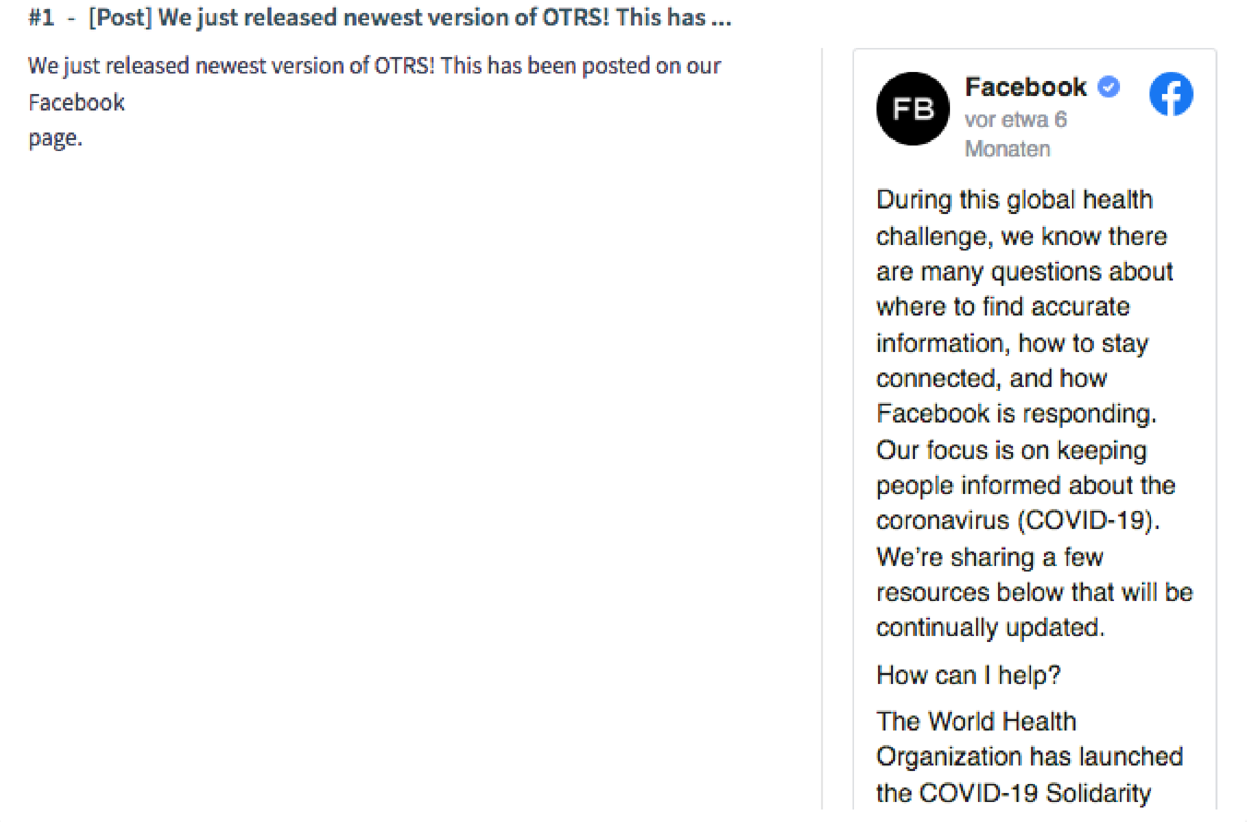
The page post appears as incoming article. Incoming articles from Facebook are shown with *[Post]* in the beginning of the articles subject. The content of the Facebook is additionally shown embedded in the article.

If a Facebook post is connected with a ticket in **OTRS**, the comments from Facebook users are sent to OTRS and appear as incoming conversations.

All comments to a Facebook post that is connected with a corresponding ticket in **OTRS** are displayed as new article containing a *[Comment]* in the beginning of the articles subject.

Replies to a Facebook post or a comment can be send via OTRS using the article action *Reply via Comment*.

It is possible to send a *Like* reaction to a Facebook post or to a comment by using the OTRS article action *Like Article*.



#1 - [Post] We just released newest version of OTRS! This has ...

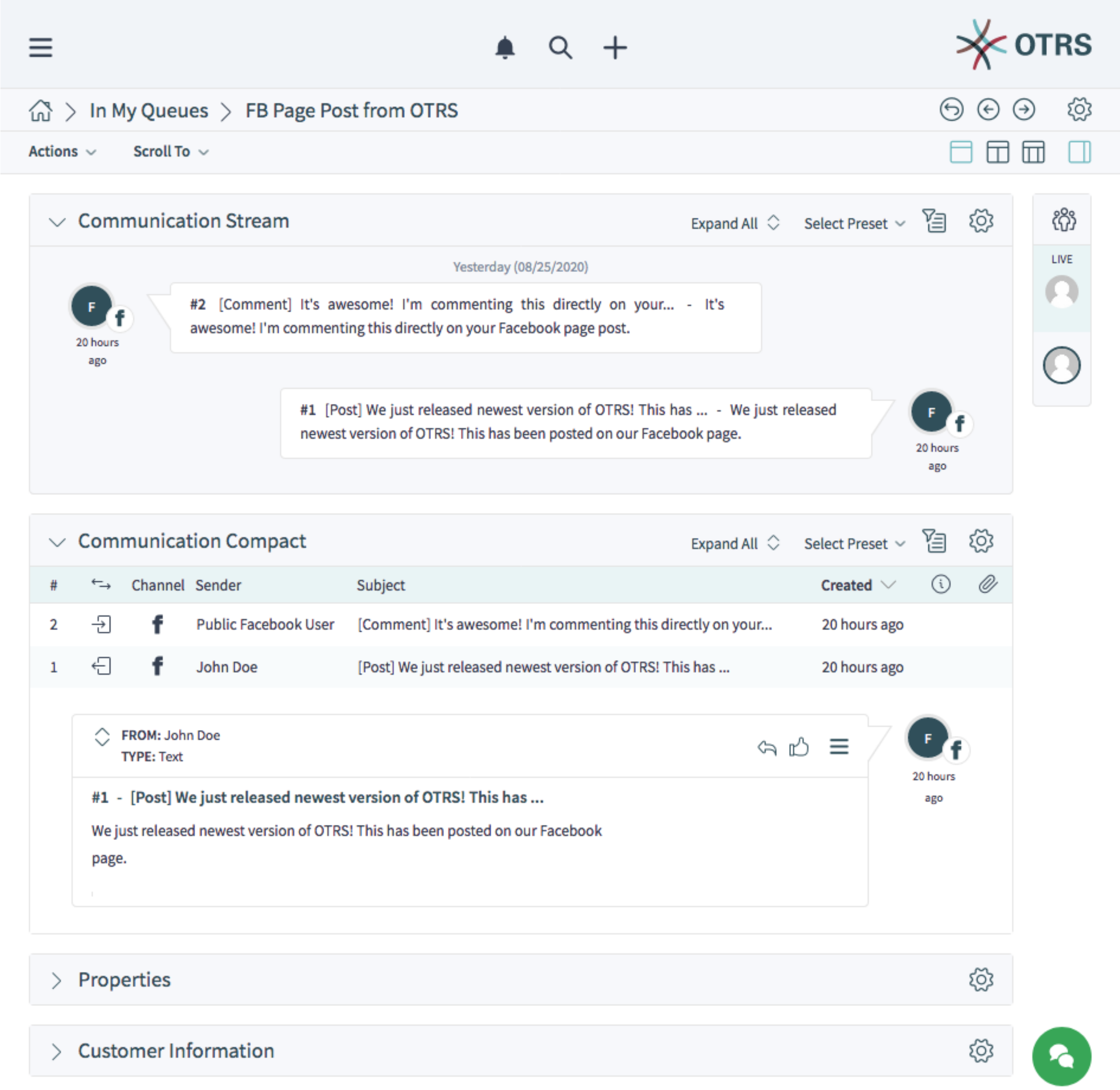
We just released newest version of OTRS! This has been posted on our
Facebook
page.

During this global health challenge, we know there are many questions about where to find accurate information, how to stay connected, and how Facebook is responding. Our focus is on keeping people informed about the coronavirus (COVID-19). We're sharing a few resources below that will be continually updated.

How can I help?

The World Health Organization has launched the COVID-19 Solidarity

Fig. 3: Facebook Page Post Embedded in Article


OTRS
In My Queues
FB Page Post from OTRS
Actions
Scroll To
Communication Stream
Expand All
Select Preset
Yesterday (08/25/2020)
F
20 hours ago
LIVE

#2 [Comment] It's awesome! I'm commenting this directly on your... - It's awesome! I'm commenting this directly on your Facebook page post.

#1 [Post] We just released newest version of OTRS! This has ... - We just released newest version of OTRS! This has been posted on our Facebook page.

Communication Compact
Expand All
Select Preset

| # | | Channel | Sender | Subject | Created |
|---|---|---|---|---|---|
| 2 | | f | Public Facebook User | [Comment] It's awesome! I'm commenting this directly on your... | 20 hours ago |
| 1 | | f | John Doe | [Post] We just released newest version of OTRS! This has ... | 20 hours ago |

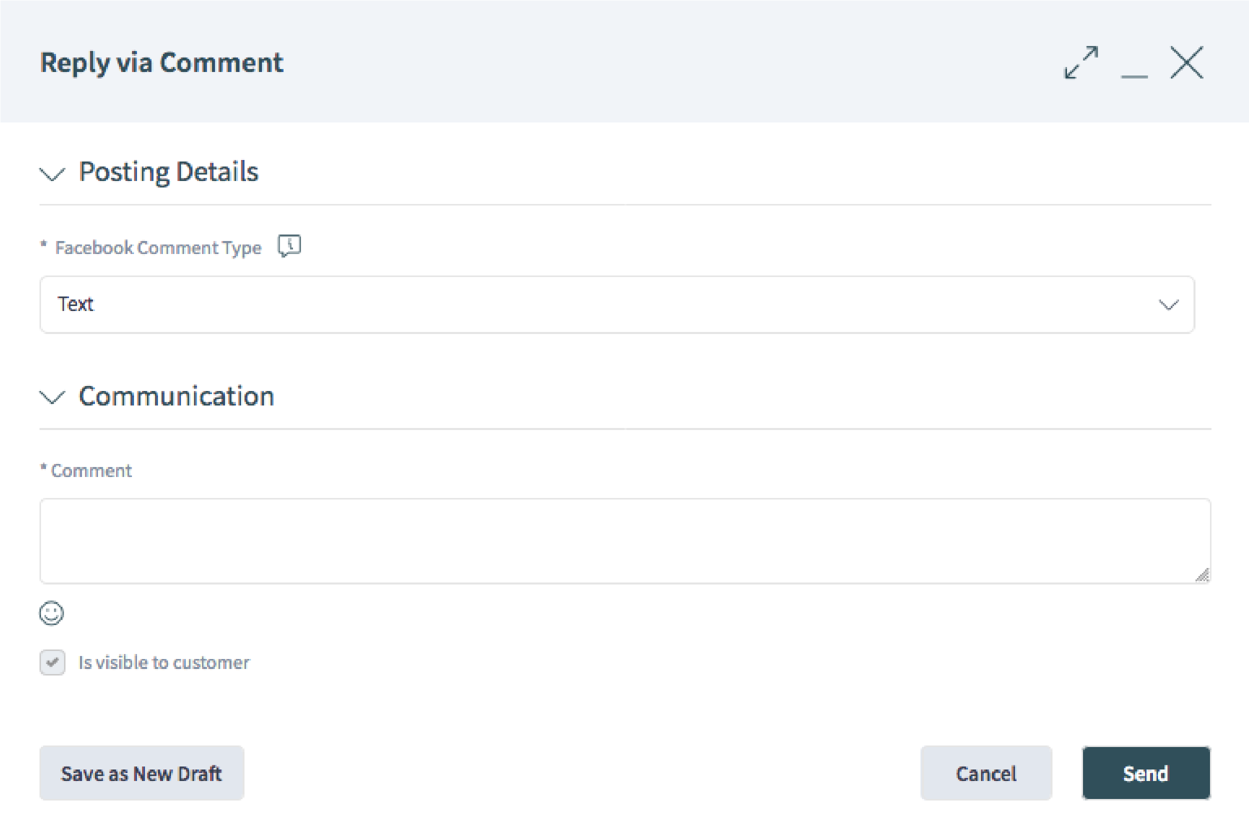
**FROM:** John Doe
**TYPE:** Text

**#1 - [Post] We just released newest version of OTRS! This has ...**

We just released newest version of OTRS! This has been posted on our Facebook page.

F
20 hours ago
Properties
Customer Information

Fig. 4: Comment from Public User to a Facebook Post



Reply via Comment

Posting Details

* Facebook Comment Type

Text

Communication

* Comment

☑ Is visible to customer

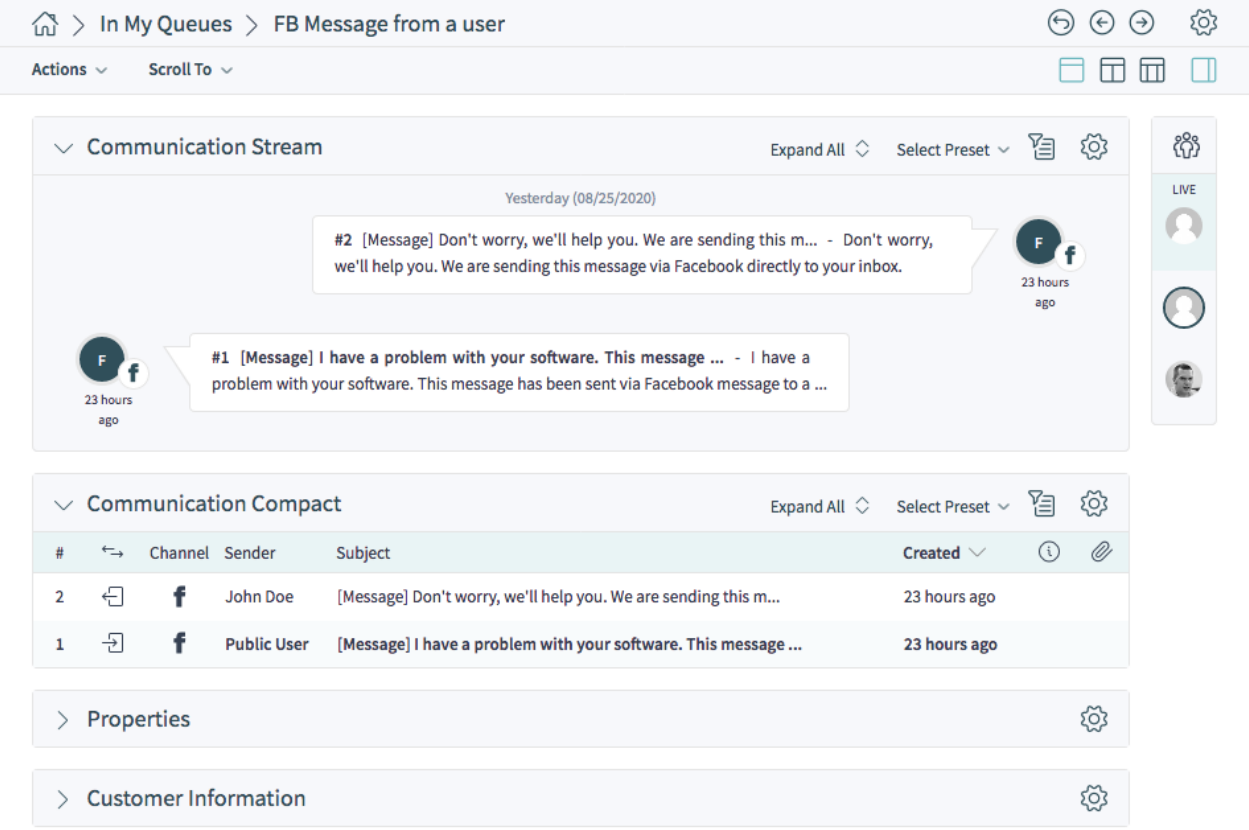
Save as New Draft
Cancel
Send

Fig. 5: Reply via Comment

If a public user writes a direct message to a Facebook page that is connected with **OTRS** then the following happens:

- If there has been any communication between this user and OTRS and there is an open ticket for this customer user, the direct message is sent to the ticket with *open* state. If there is more than one open tickets, then the system sends it to the youngest ticket that has an *open* state.
- If there is no already existing communication with OTRS, the direct message will create a new ticket.

The direct messages are displayed as articles within the ticket.



Yesterday (08/25/2020)

#2 [Message] Don't worry, we'll help you. We are sending this m... - Don't worry, we'll help you. We are sending this message via Facebook directly to your inbox.

23 hours ago

#1 [Message] I have a problem with your software. This message ... - I have a problem with your software. This message has been sent via Facebook message to a ...

23 hours ago

| # | | Channel | Sender | Subject | Created |
|---|---|---|---|---|---|
| 2 | | f | John Doe | [Message] Don't worry, we'll help you. We are sending this m... | 23 hours ago |
| 1 | | f | Public User | [Message] I have a problem with your software. This message ... | 23 hours ago |

Fig. 6: Facebook Message from Public User

All messages are displayed as new articles containing a *[Message]* in the beginning of the articles subject.

OTRS agents can reply to direct messages by using the article action *Reply via Direct Message*.

**Note:** If the content of a comment has been changed or deleted OTRS will create a new article with the changed content or with the information that the content has been deleted.

## 14.2 LinkedIn

To create a LinkedIn post ticket:

1. Go to the main menu and select *Create LinkedIn Post*.

2. Fill in the fields.
3. Select a LinkedIn account.
4. Add a title. The title is only for internal purposes. It is the title of the corresponding ticket for a LinkedIn post.
5. Write the content of the message.
6. Click on the *Create* button after all relevant fields are filled.

This creates a new LinkedIn post and a ticket in **OTRS** containing the LinkedIn post as first article.

It is possible to add attachments of the following type:

- GIF
- Photo
- Video

**Note:** The ticket create view for LinkedIn post tickets contains an additional widget *LinkedIn Account History*. This widget shows all LinkedIn posts that have been created for the selected LinkedIn account.

To send a LinkedIn post from an existing ticket:

1. Open the existing ticket in the ticket detail view.
2. Select *Create LinkedIn Post* in the *Actions* menu.
3. Select the LinkedIn organization.
4. Select the post type.
5. Fill in the text for the post.
6. Click on the *Send* button.

This creates a new article in the ticket and a new post on the LinkedIn platform.

In the ticket detail view, the widgets *Communication Compact* and *Communication Stream* display all communications sent from OTRS to LinkedIn or sent from LinkedIn to OTRS with a LinkedIn icon in the column *Channel*.

The layout of a LinkedIn post is displayed within the article.

All comments to a LinkedIn post that is connected with a corresponding ticket in **OTRS** are displayed as new article containing a *[Comment]* in the beginning of the articles subject.

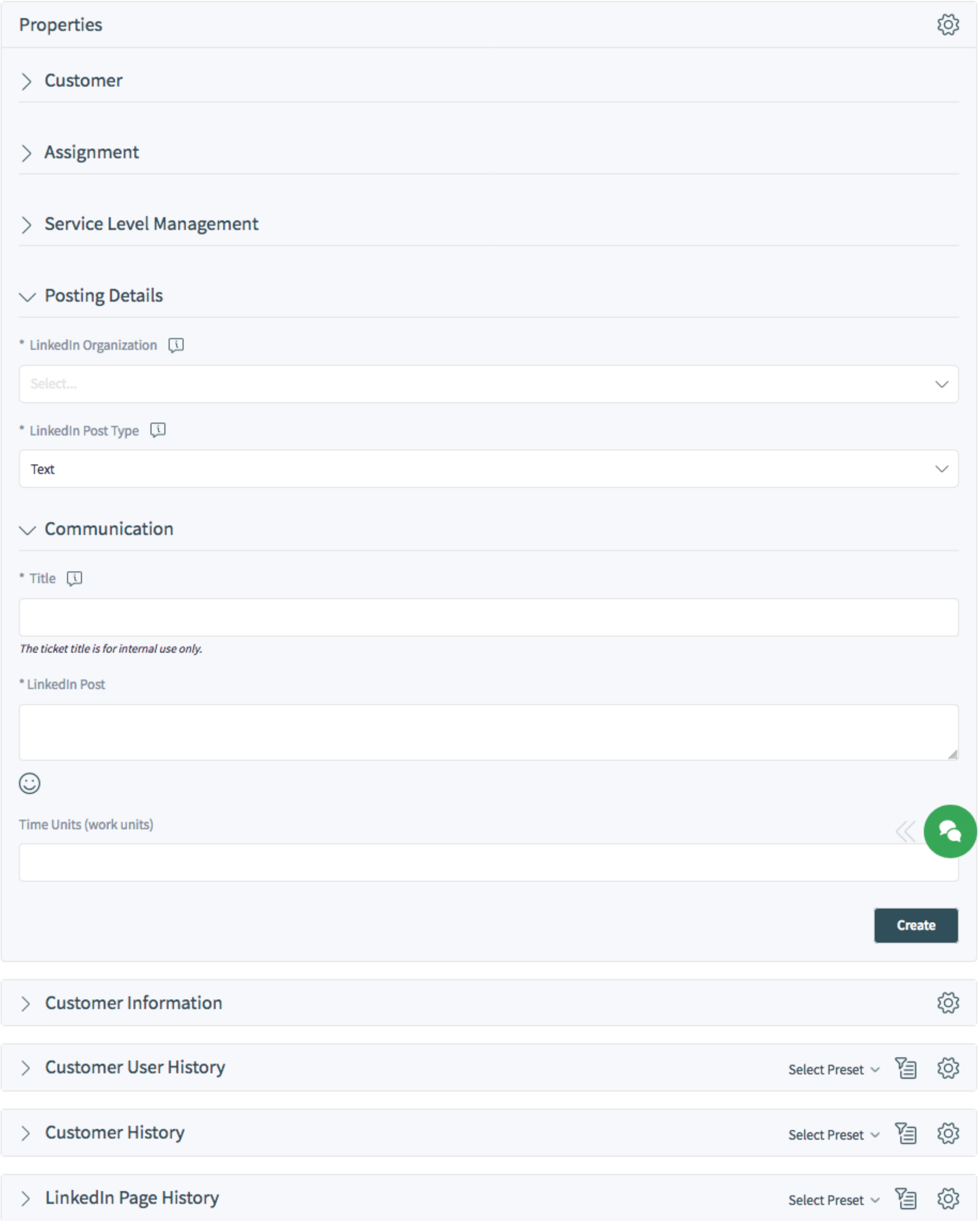
Comments to a LinkedIn Post can be send via OTRS using the article action *Reply via Comment*.

**Note:** There may be some delay for added content coming directly from the LinkedIn platform, such as new comments and likes.

## 14.3 Twitter

To create a new Twitter tweet ticket:

1. Go to the main menu and select *Create Twitter Tweet Ticket*.

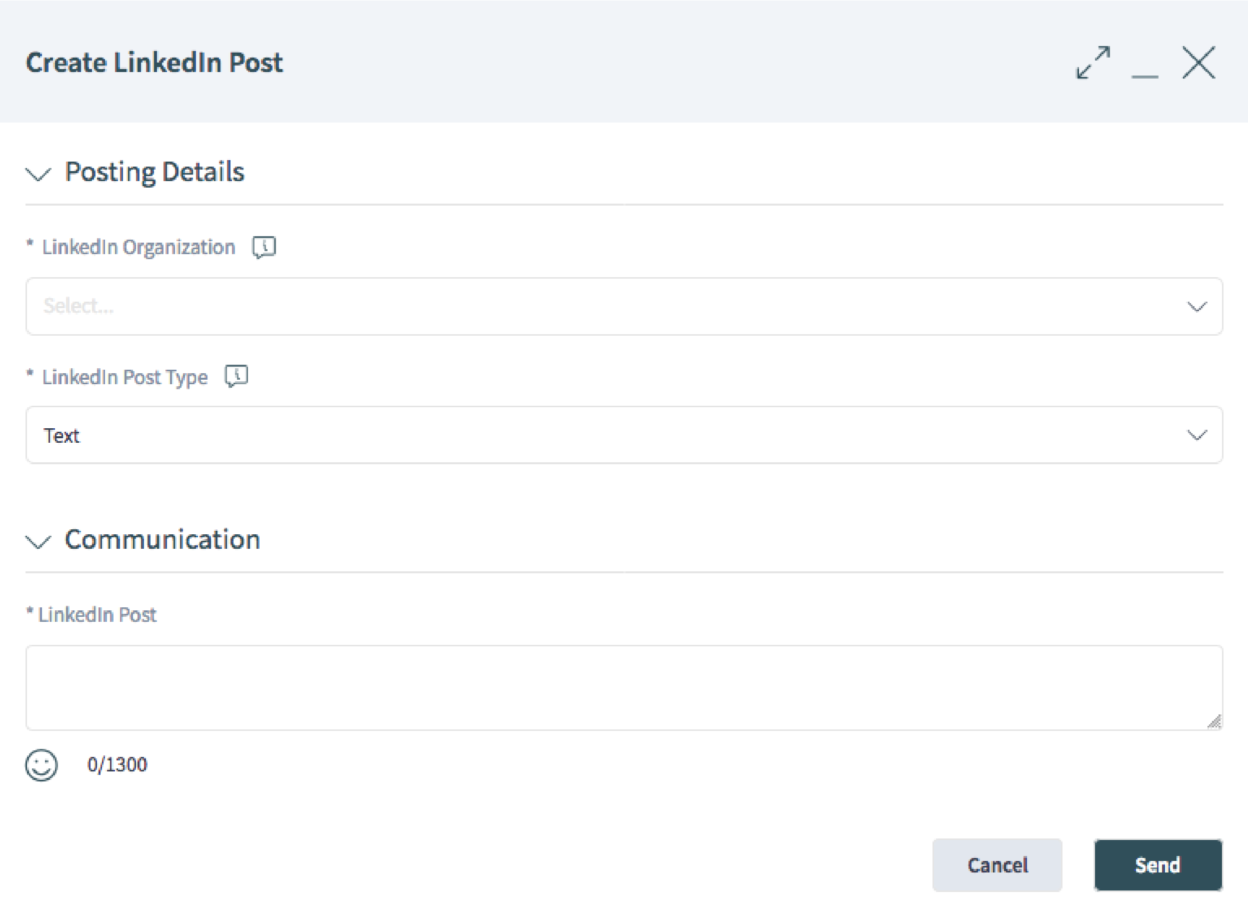


Properties
Customer
Assignment
Service Level Management
Posting Details
* LinkedIn Organization
Select...
Communication
* Title
* LinkedIn Post
Time Units (work units)
Create
Customer Information
Customer User History
Select Preset
Customer History
Select Preset
LinkedIn Page History
Select Preset

* LinkedIn Post Type: Text

The ticket title is for internal use only.

Fig. 7: Create LinkedIn Ticket

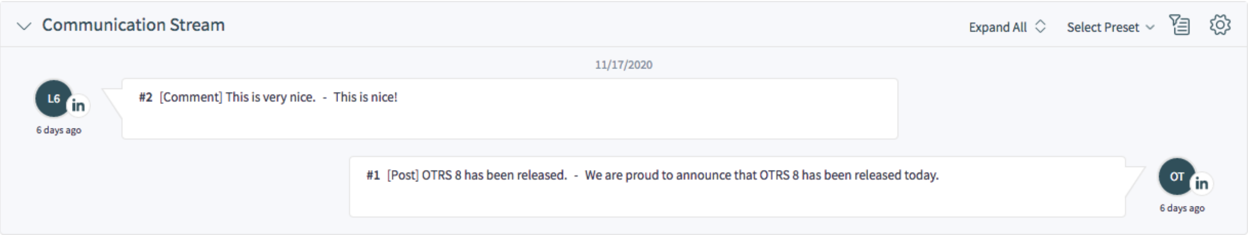

Create LinkedIn Post
Posting Details
Communication
0/1300
Cancel
Send

* LinkedIn Organization: Select...

* LinkedIn Post Type: Text

* LinkedIn Post

Fig. 8: Create LinkedIn Post


Communication Stream
Expand All
Select Preset
11/17/2020
L6
6 days ago
OT
6 days ago

#2 [Comment] This is very nice. - This is nice!

#1 [Post] OTRS 8 has been released. - We are proud to announce that OTRS 8 has been released today.

Fig. 9: Communication Stream

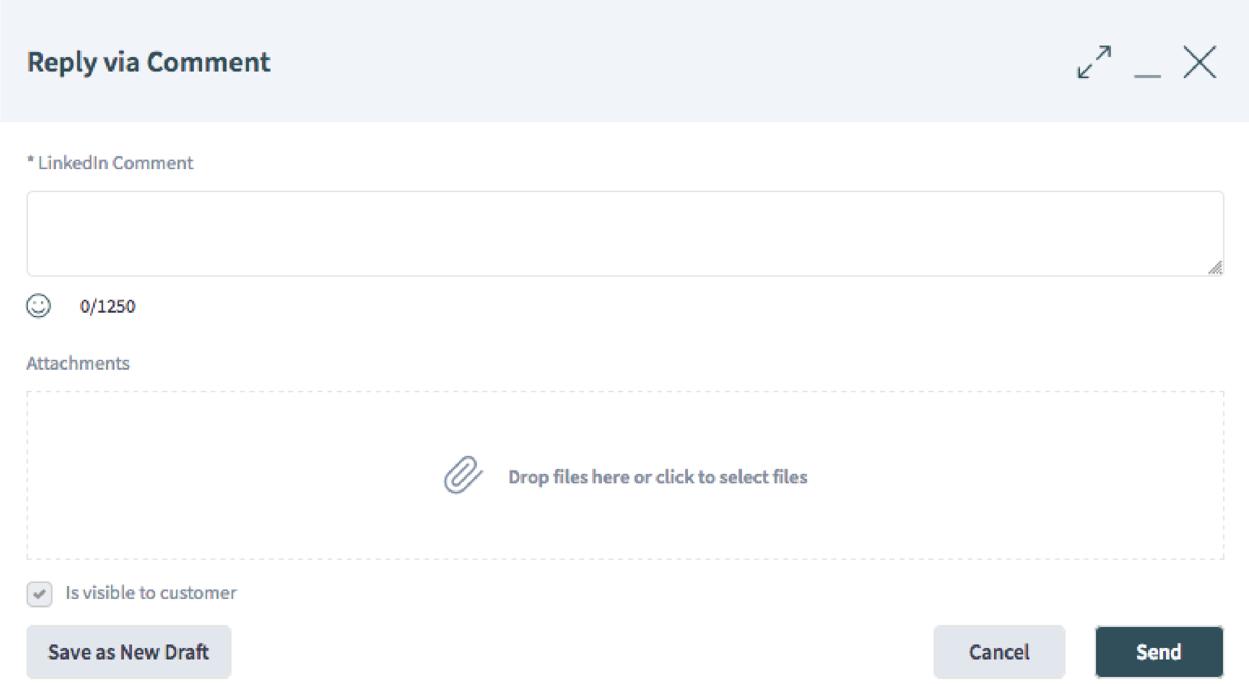

Reply via Comment
* LinkedIn Comment
0/1250
Attachments
Drop files here or click to select files
☑ Is visible to customer
Save as New Draft
Cancel
Send

Fig. 10: Linked In - Reply via Comment

2. Fill in the fields.

   For Twitter tweet tickets there is an additional section *Posting Details* at the ticket create screen and the section *Communication* is different:

3. Select a Twitter account.
4. Add a title. The title is only for internal purposes. It is the title of the corresponding ticket for a twitter tweet.
5. Write the content of the message.
6. Click on the *Create* button after all relevant fields are filled.

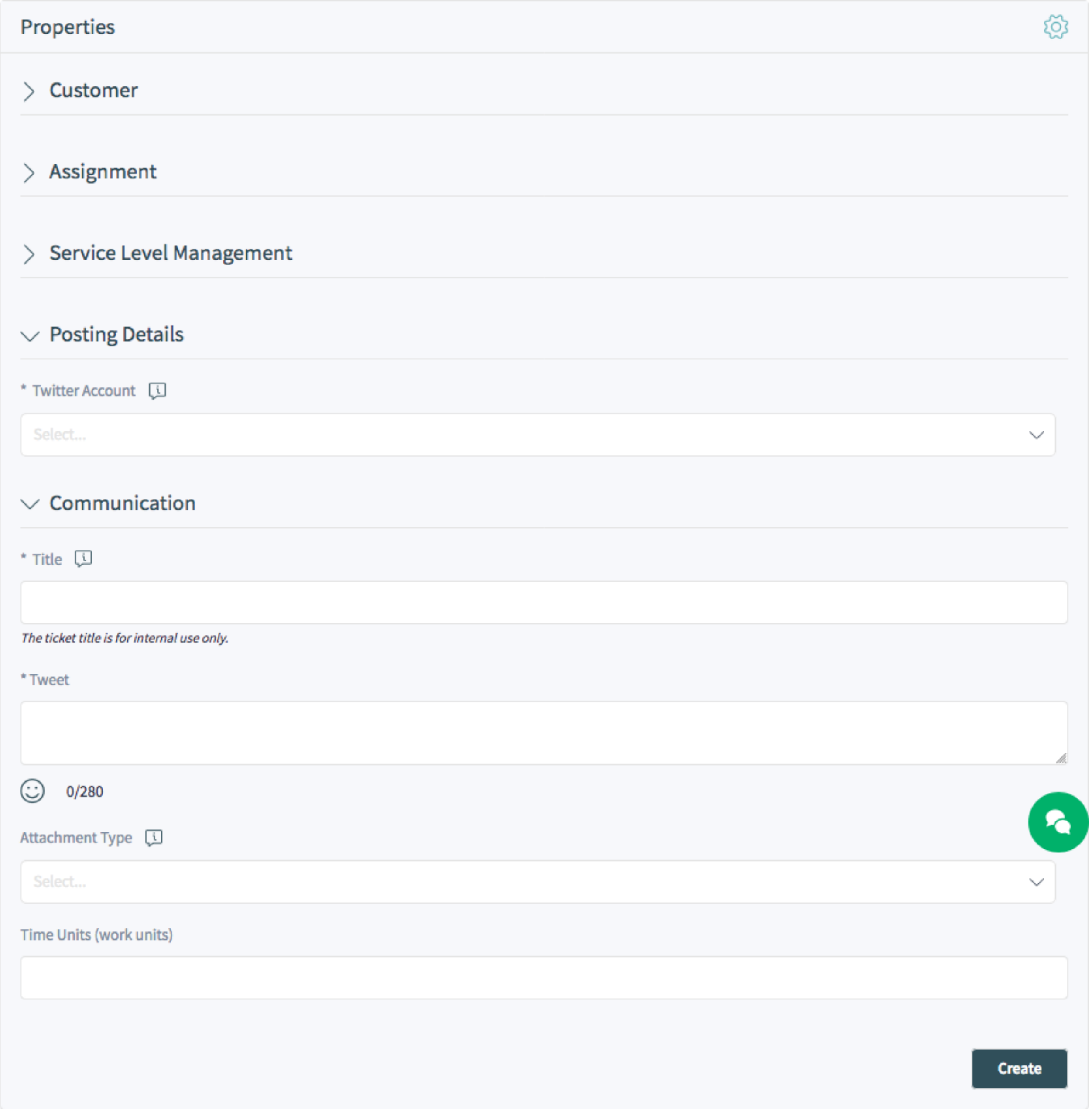
This creates a new Twitter tweet and a ticket in **OTRS** containing the Twitter tweet as first article.

It is possible to add attachments of the following type:

- Photos (JPEG/WEBP/PNG, up to 4 files and up to 5 MB each)
- GIF
- Video (single file up to 15 MB)

**Note:** The ticket create view for Twitter tweet tickets contains an additional widget *Twitter Account History*. This widget shows all Twitter tweets that have been created for the selected Twitter account.

In the ticket detail view, the widgets *Communication Compact* and *Communication Stream* display all communications sent from OTRS to Twitter or sent from Twitter to OTRS with a Twitter icon in the column *Channel*.



Properties

Customer

Assignment

Service Level Management

Posting Details

* Twitter Account

Select...

Communication

* Title

The ticket title is for internal use only.

* Tweet

0/280

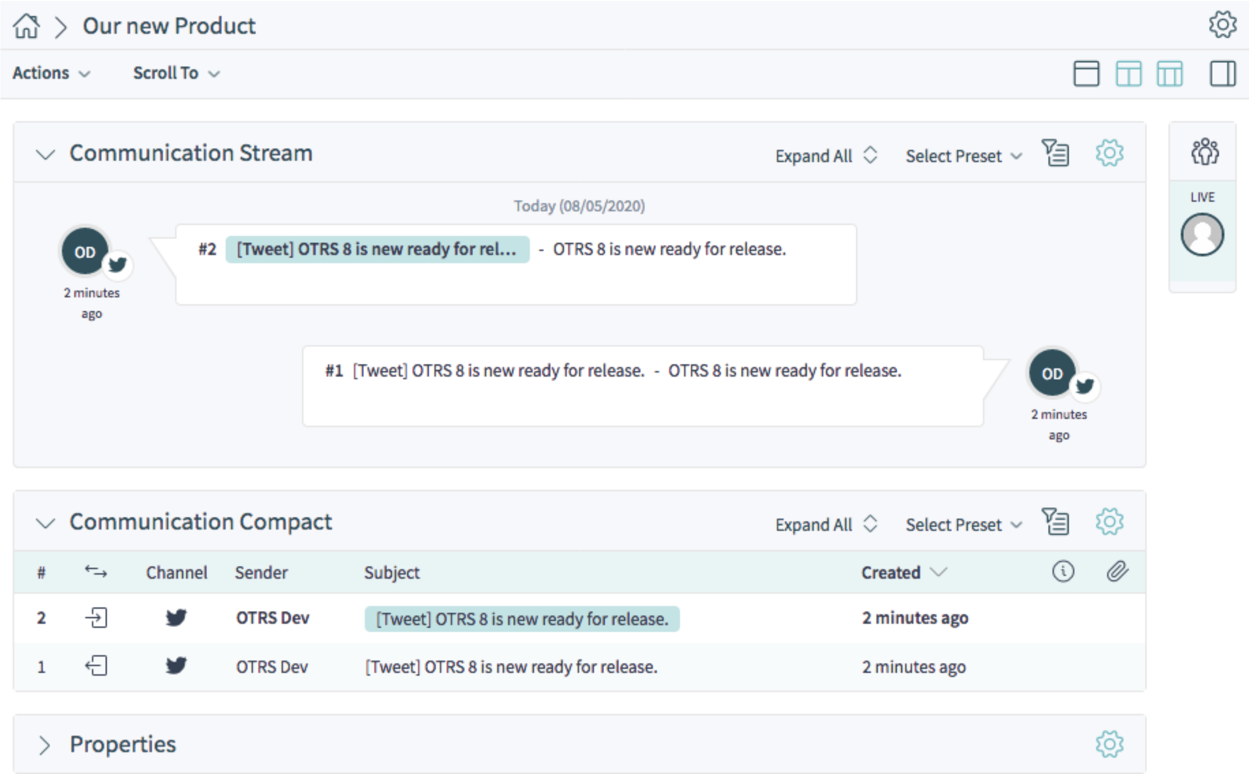
Attachment Type

Select...

Time Units (work units)

Create

Fig. 11: Twitter Tweet Ticket Properties


Our new Product
Actions
Scroll To
Communication Stream
Expand All
Select Preset
LIVE
Today (08/05/2020)
OD
2 minutes ago
OD
2 minutes ago
Communication Compact
Expand All
Select Preset
Properties

#2 [Tweet] OTRS 8 is new ready for rel... - OTRS 8 is new ready for release.

#1 [Tweet] OTRS 8 is new ready for release. - OTRS 8 is new ready for release.

| # | | Channel | Sender | Subject | Created | | |
|---|---|---|---|---|---|---|---|
| 2 | | | OTRS Dev | [Tweet] OTRS 8 is new ready for release. | 2 minutes ago | | |
| 1 | | | OTRS Dev | [Tweet] OTRS 8 is new ready for release. | 2 minutes ago | | |

Fig. 12: Twitter Tweet Ticket Detail View

The layout of a twitter tweet is displayed within the article.

All comments or retweets to a Twitter tweet that is connected with a corresponding ticket in **OTRS** are displayed as new article containing a *[Comment]* or *[Tweet]* in the beginning of the articles subject.

Replies to Twitter tweet can be send via OTRS using the article action *Reply via Comment*.

If a twitter user likes a tweet that has been created with **OTRS**, then it will create a new version of the article in **OTRS**.

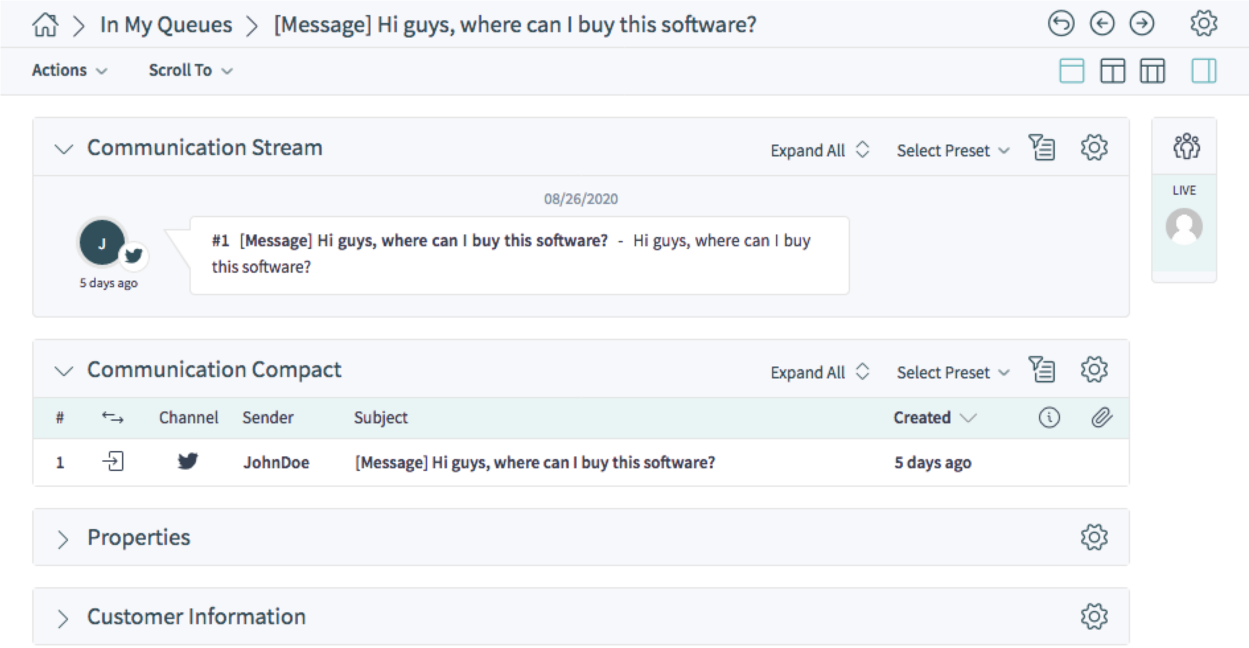
If a public user writes a direct message to a twitter page that is connected with **OTRS** then the following happens:

- If there has been any communication between this user and OTRS and there is an open ticket for this customer user, the direct message is send to the ticket with *open* state. If there are more than one open tickets, then the system sends it to the youngest ticket that has an *open* state.
- If there is no already existing communication with OTRS, the direct message will create a new ticket.

The direct messages are displayed as articles within the ticket.

All messages are displayed as new articles containing a *[Message]* in the beginning of the articles subject.

OTRS agents can reply to direct messages by using the article action *Reply via Direct Message*.


In My Queues
[Message] Hi guys, where can I buy this software?
Actions
Scroll To
Communication Stream
Expand All
Select Preset
LIVE
08/26/2020
J
5 days ago
Communication Compact
Properties
Customer Information

#1 [Message] Hi guys, where can I buy this software? - Hi guys, where can I buy this software?

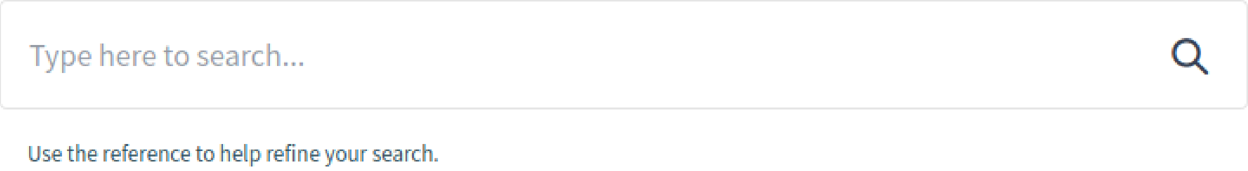
| # |  | Channel | Sender | Subject | Created |  |  |
|---|---|---|---|---|---|---|---|
| 1 |  |  | JohnDoe | [Message] Hi guys, where can I buy this software? | 5 days ago |  |  |

Fig. 13: Incoming Twitter Direct Message

CHAPTER 15

# Search

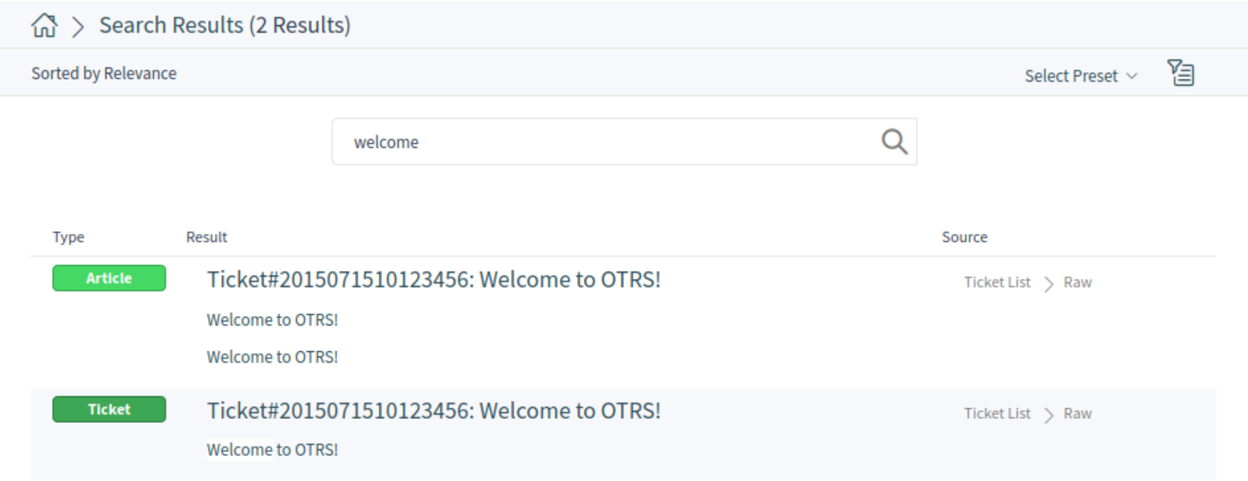
Use this menu item to search for something. The *Search Results* screen is available if you click on the magnification glass icon in the header bar, enter a search term and hit *Enter* key on your keyboard.


Type here to search...

Use the reference to help refine your search.

Fig. 1: Search Dialog

If the search has results, a new screen will open.


Search Results (2 Results)
Sorted by Relevance
Select Preset

welcome

| Type | Result | Source |
|---|---|---|
| Article | Ticket#2015071510123456: Welcome to OTRS!<br>Welcome to OTRS!<br>Welcome to OTRS! | Ticket List > Raw |
| Ticket | Ticket#2015071510123456: Welcome to OTRS!<br>Welcome to OTRS! | Ticket List > Raw |

Fig. 2: Search Results Screen

This screen lists all objects that match the search term. The objects are grouped by type. To find the desired object, open the filter section from the breadcrumb bar and use the filters to narrow the results.

## 15.1 Search Parameters

The query string consists of *terms* and *operators*. A term can be a single word or a phrase surrounded by double quotes. Operators allow you to customize the search.

**Single word** If the query string is a single word (for example `quick` or `brown`), then **OTRS** searches for all items containing the given word.

If two or more words are given in the query string (for example `quick brown`), then **OTRS** searches for all items containing the word `quick` **or** `brown`.

**Phrase surrounded by double quotes** If the query string contains a phrase surrounded by double quotes (for example `"quick brown"`), then **OTRS** searches for all items containing both the words in the phrase in the same order.

**Wildcards** Use `?` to replace a single character, and `*` to replace zero or more characters (for example `qu?ck bro*`).

---

**Note:** Wildcard queries can lead to performance issues because many terms need to be queried to match the query string.

---

**Regular expressions** Regular expression patterns can be embedded in the query string by wrapping them in slashes (for example `/joh?n(ath[oa]n)/`).

**See also:**

The supported regular expression syntax is explained in regular expression syntax chapter of the Elasticsearch documentation.

**Fuzziness** It is possible to search for terms that are similar to, but not exactly like the given search terms, using the *fuzzy* operator (for example `quikc~ brwn~ foks~`).

The default fuzziness level is 2, but a level of 1 should be sufficient to catch 80% of all human misspellings. It can be specified as `quikc~1`.

Fuzziness can be disabled with `quikc~0` which will not consider spelling mistakes.

**Proximity** The query string like `"quick fox"` searches the words in exactly the same order, but the proximity search allows that some other words can be included between the given words (for example `"fox quick"~5`).

This operator specifies the maximum edit distance of the words. The phrase *quick fox* would be considered more relevant than *quick brown fox*.

**Ranges** This query string can contain ranges of dates, numbers or strings. Inclusive ranges are specified with square brackets `[min TO max]`, and exclusive ranges are created with curly brackets `{min TO max}`.

**Boosting** The *boost* operator `^` can be used to make one term more relevant than another. For example, use the query string `quick^2 fox`, if you want to find all documents about foxes, but you are especially interested in quick foxes.

You can also use boosts for phrases or groups, such as `"quick fox"^2 AND (brown lazy)^4`.

**Boolean operators** The query string `quick brown fox` searches for all items containing one or more of the specified words.

The preferred operators are `+` (term must be present) and `-` (term must not be present). All other terms are optional.

For example if the query string is `quick brown +fox -news` then it means:

- `fox` must be present.
- `news` must not be present.
- `quick` and `brown` are optional.

The well known logical operators `AND`, `OR` and `NOT` (or `&&`, `||` and `!`) are also supported. The query string `((quick AND fox) OR (brown AND fox) OR fox) AND NOT news` is identical to the previous example.

**Grouping** Changing the precedence with parentheses is possible, like `(quick OR brown) AND fox`.

**Reserved characters** There are some reserved characters which function as operators, and they can not be used in search queries.

The reserved characters are: `+ - = && || > < ! ( ) { } [ ] ^ " ~ * ? : \ /`.

If any of these characters need to be used in search queries, then you should escape them with a leading backslash. For example to search for the term *(1+1)=2*, you have to use the query string as `\(1\+1\)\=2`.

**See also:**

More information can be found in the query string syntax chapter of the Elasticsearch documentation.

## CHAPTER 16

# Mobile App

The OTRS mobile app offers you the possibility of using the OTRS agent interface on a mobile device. The app supports multiple accounts with one-tap switching. Furthermore, the app supports two-factor authentication methods.

The OTRS mobile app is available in the Google Play Store and Apple App Store.

The usage of **OTRS** on a mobile device is the same as in the browser. This chapter only describes how to link the app with an OTRS account.

## 16.1 Manage Accounts

After starting the app, the account management screen is displayed and lists the connected **OTRS** instances. It is possible to use multiple OTRS instances for your job. As you add an account, the related OTRS instance will also be added and listed on the account management screen.

To add an account:

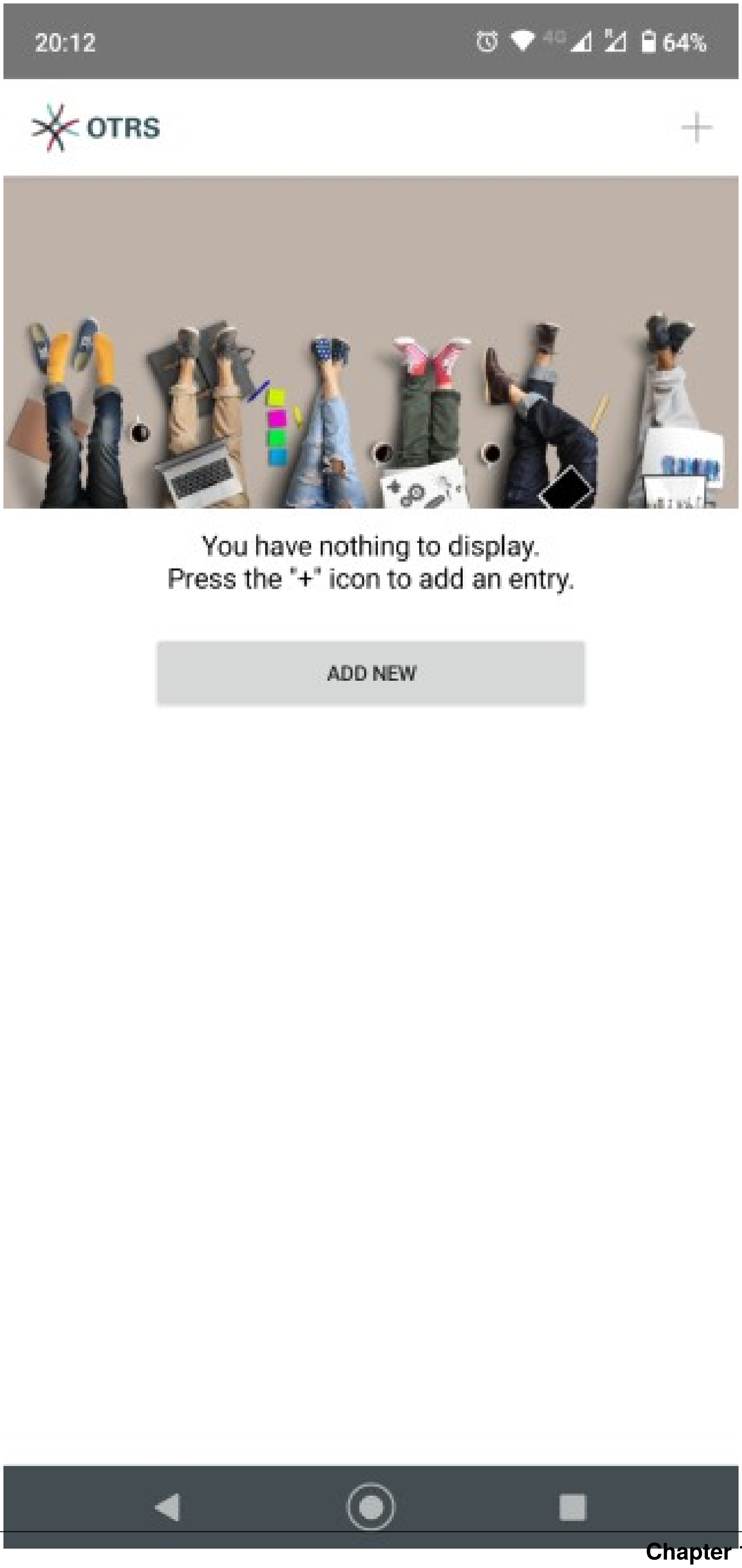
1. Tap the *Add New* button.
2. Fill in the required fields.
3. Tap the *Save* button.

The app now establishes connection with the web server and checks if everything is in order. After successfully being added, the account is displayed on the account management screen.

To edit an account:

1. Tap the *Edit* icon in the title bar.
2. Tap the *Edit* button next to an account.
3. Modify the fields.
4. Tap the *Save* button.

To remove an account:



20:12
64%
OTRS
+

You have nothing to display.
Press the "+" icon to add an entry.

ADD NEW

Fig. 1: Account Management Screen

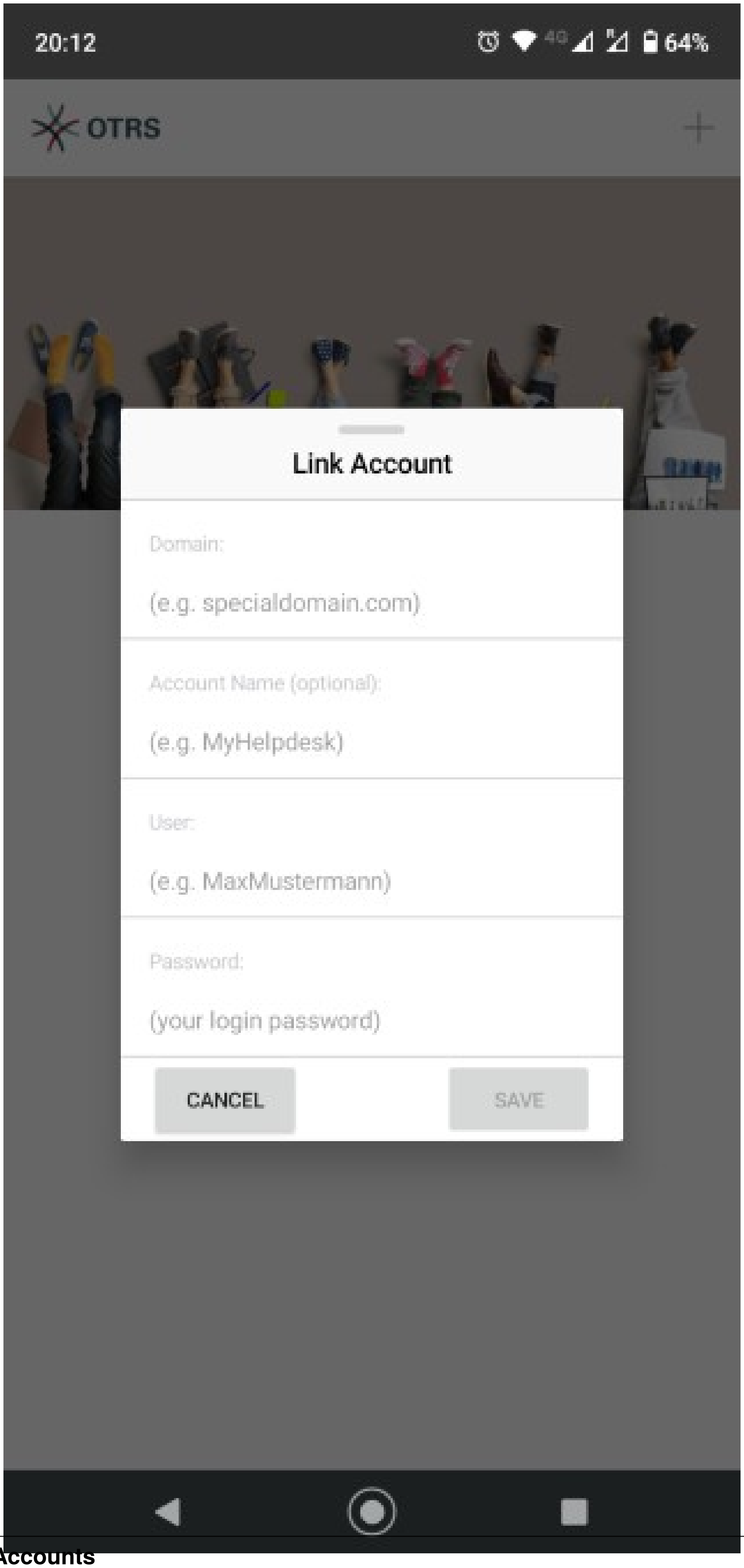

20:12
64%
OTRS
Link Account
Domain:
(e.g. specialdomain.com)
Account Name (optional):
(e.g. MyHelpdesk)
User:
(e.g. MaxMustermann)
Password:
(your login password)
CANCEL
SAVE

Fig. 2: Link Account Screen

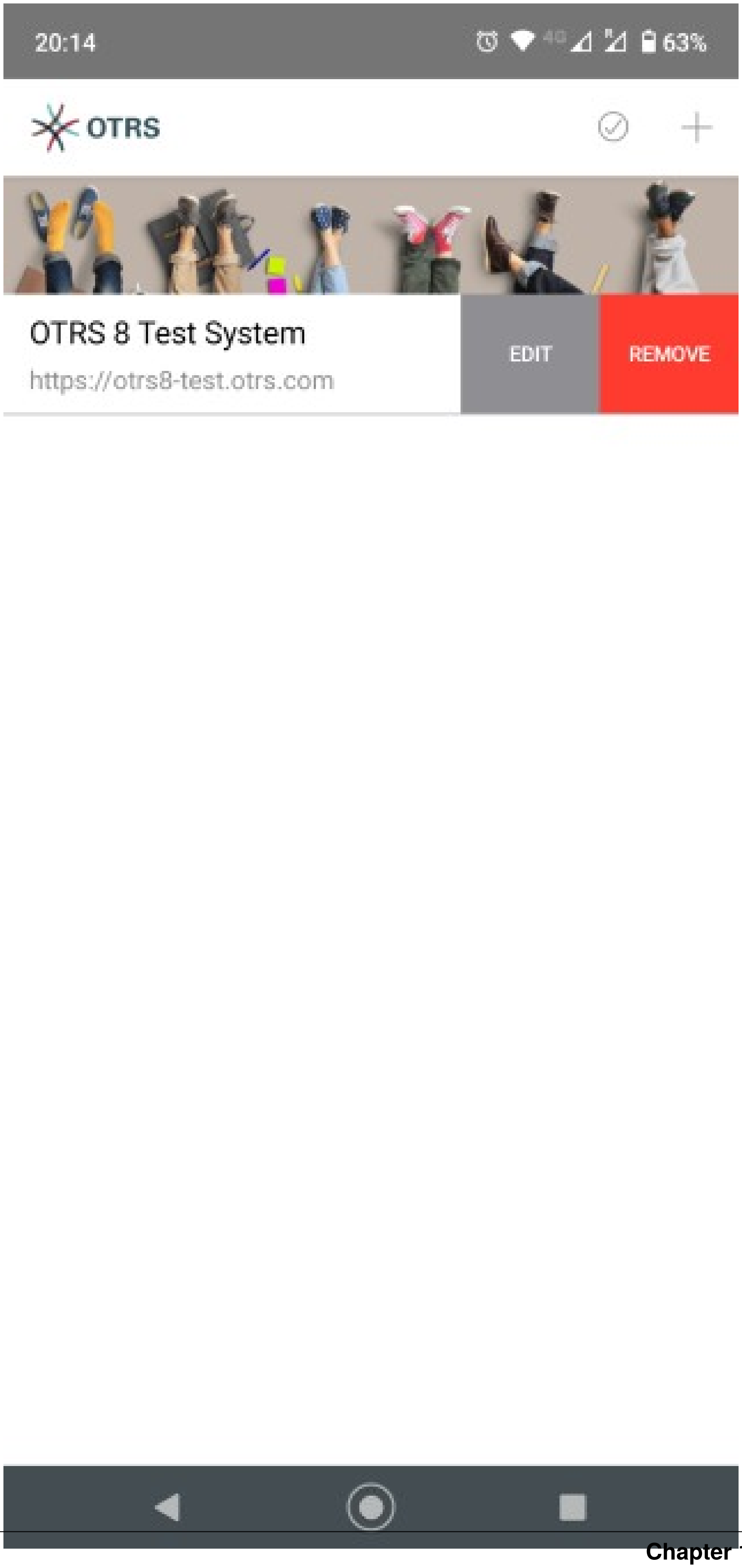

20:14
63%
OTRS
OTRS 8 Test System
https://otrs8-test.otrs.com
EDIT
REMOVE

Fig. 3: Edit or Remove Account

1. Tap the *Edit* icon in the title bar.
2. Tap the *Remove* button next to an account.
3. Confirm the message by tapping *OK* button.

## 16.2 Using the App

After installing the app and linking a new account, **OTRS** can be used like it would be in a browser.

To log in to an account, simply tap on it once in the list. The app will log in using the supplied credentials and show the dashboard of **OTRS**.

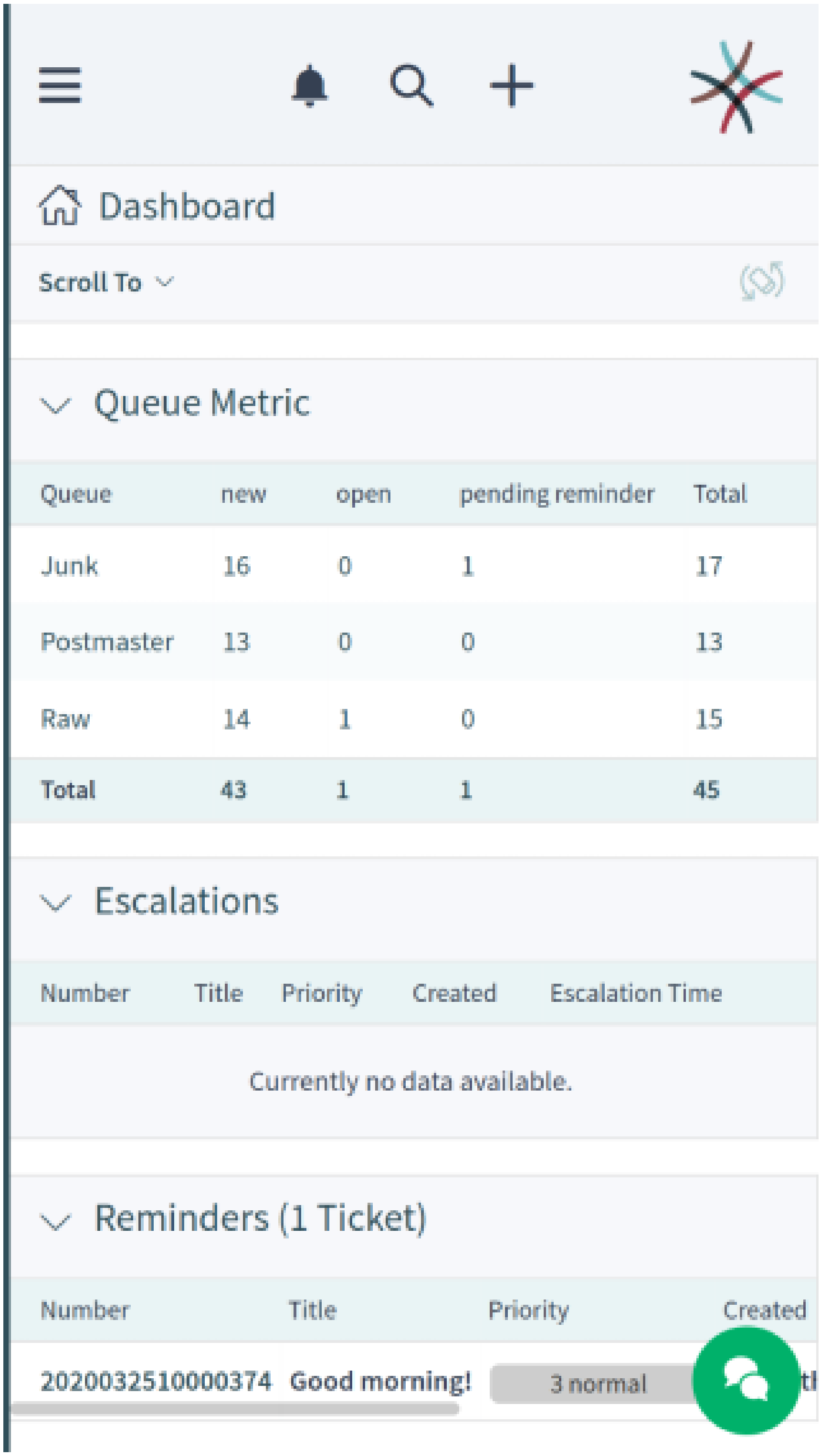
**Note:** In case the account has any of the two-factor authentication methods setup, you will be asked to complete the authentication challenge in order to log in.

The app contains a title bar where the name of the OTRS instance is displayed. The arrow icon in the top left corner switches you back to the account management screen. The arrows in the top right corner can be used to switch back and forward within the views of **OTRS**.

The organizer sidebar is collapsed and can be expanded together with the main menu by tapping the main menu icon in the top left corner.

For reasons of space, the icons in the breadcrumb bar are not displayed when the mobile device is in portrait mode. In order to display the actions, the mobile device needs to be turned into landscape mode.

A small icon in the breadcrumb bar indicates to turn the mobile device into landscape mode.



Queue Metric

| Queue | new | open | pending reminder | Total |
|---|---|---|---|---|
| Junk | 16 | 0 | 1 | 17 |
| Postmaster | 13 | 0 | 0 | 13 |
| Raw | 14 | 1 | 0 | 15 |
| **Total** | **43** | **1** | **1** | **45** |

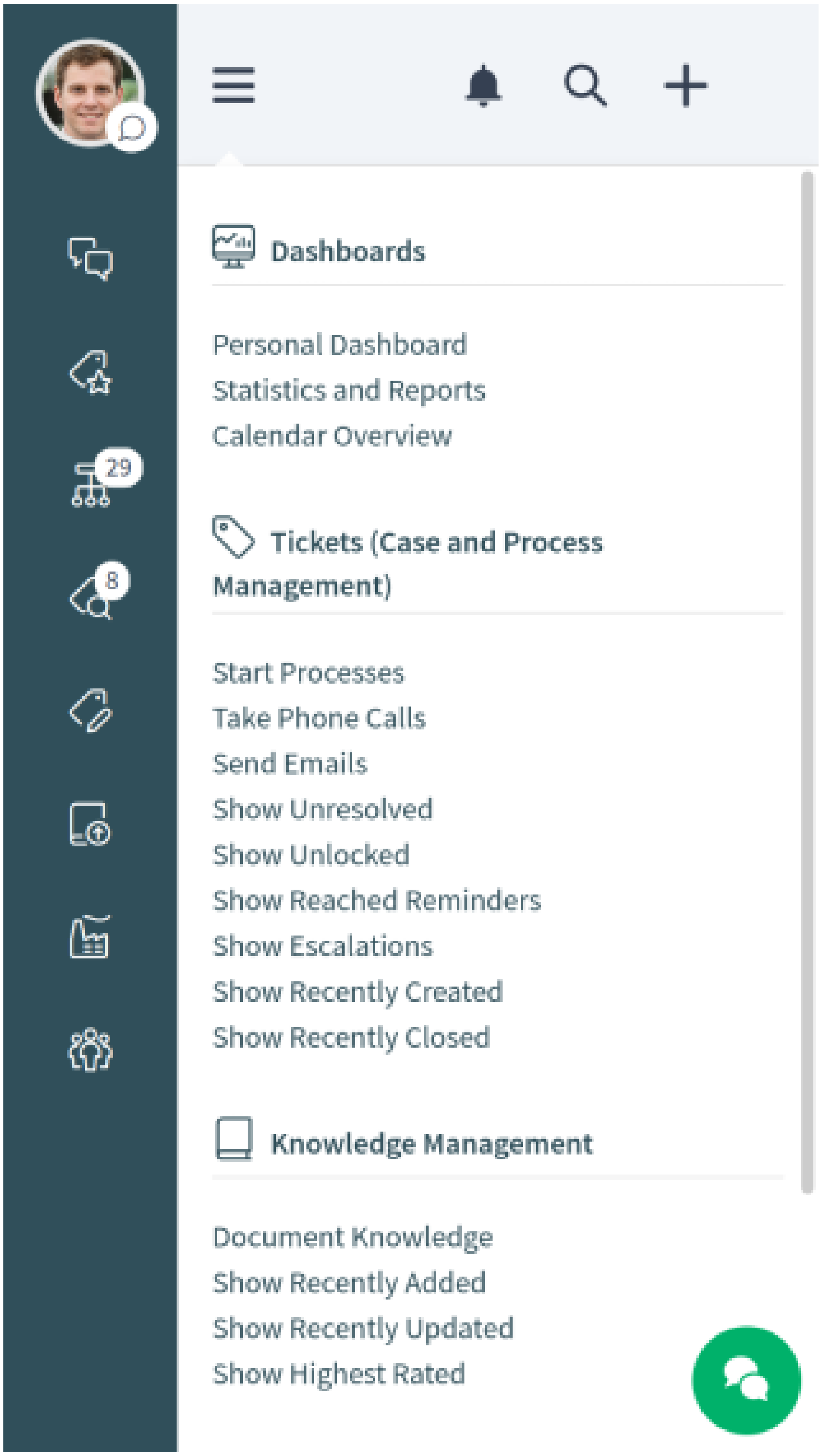
Escalations

| Number | Title | Priority | Created | Escalation Time |
|---|---|---|---|---|
| Currently no data available. | | | | |

Reminders (1 Ticket)

| Number | Title | Priority | Created |
|---|---|---|---|
| 2020032510000374 | Good morning! | 3 normal | |

Fig. 4: Dashboard on a Mobile Device



**Dashboards**

Personal Dashboard
Statistics and Reports
Calendar Overview

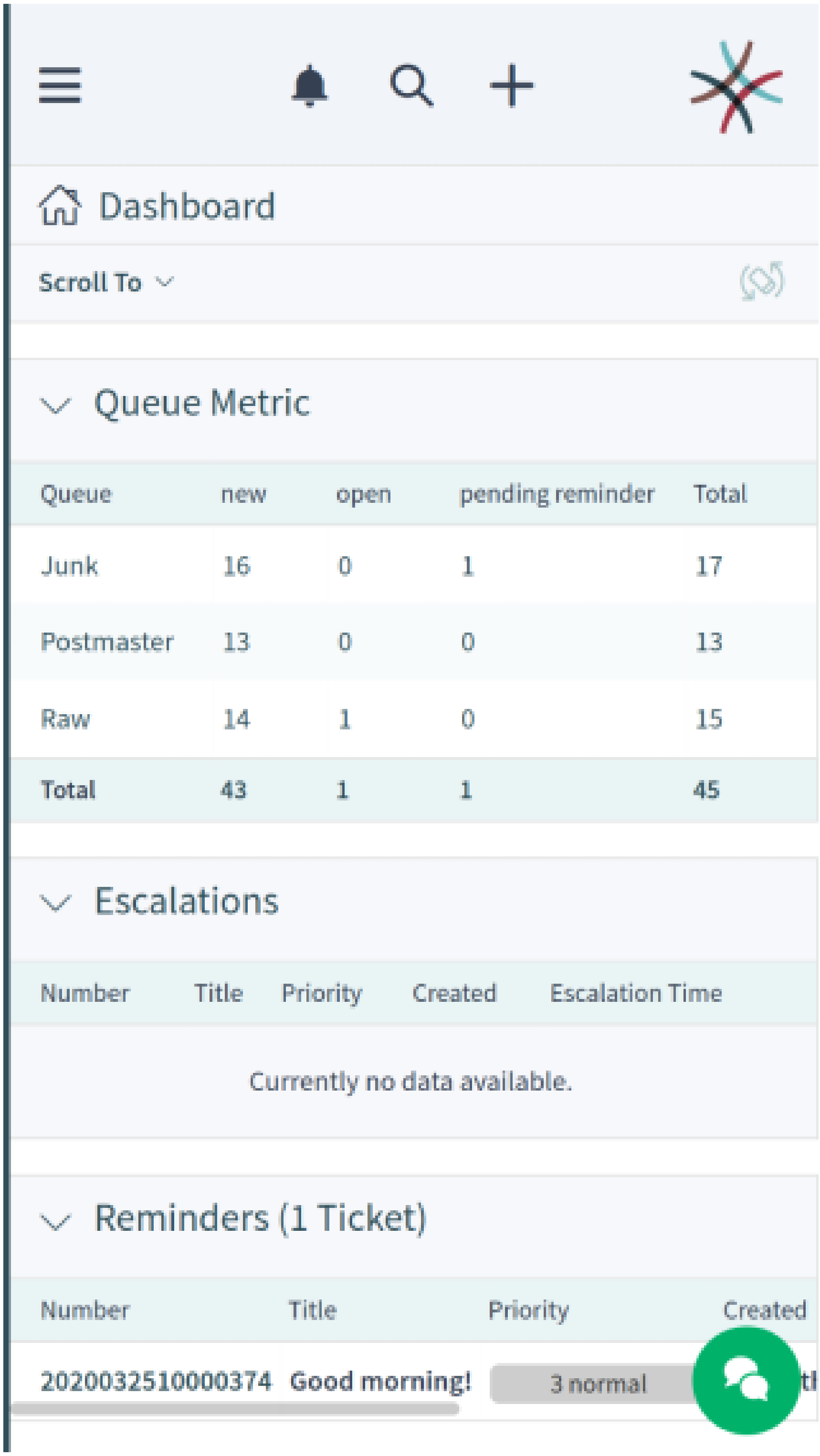
**Tickets (Case and Process Management)**

Start Processes
Take Phone Calls
Send Emails
Show Unresolved
Show Unlocked
Show Reached Reminders
Show Escalations
Show Recently Created
Show Recently Closed

**Knowledge Management**

Document Knowledge
Show Recently Added
Show Recently Updated
Show Highest Rated

Fig. 5: Organizer Sidebar and Main Menu



Dashboard

Scroll To

Queue Metric

| Queue | new | open | pending reminder | Total |
|---|---|---|---|---|
| Junk | 16 | 0 | 1 | 17 |
| Postmaster | 13 | 0 | 0 | 13 |
| Raw | 14 | 1 | 0 | 15 |
| **Total** | **43** | **1** | **1** | **45** |

Escalations

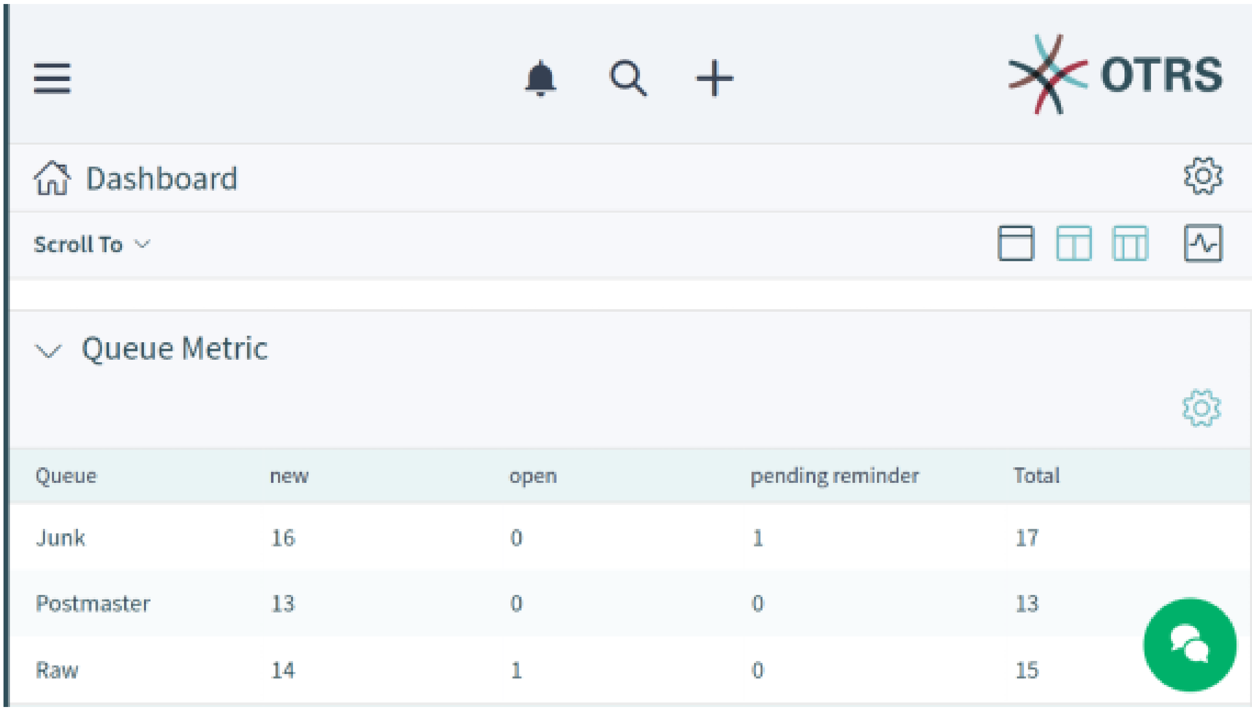
| Number | Title | Priority | Created | Escalation Time |
|---|---|---|---|---|

Currently no data available.

Reminders (1 Ticket)

| Number | Title | Priority | Created |
|---|---|---|---|
| 2020032510000374 | Good morning! | 3 normal | |

Fig. 6: Portrait Mode


OTRS
Dashboard
Scroll To
Queue Metric

| Queue | new | open | pending reminder | Total |
|---|---|---|---|---|
| Junk | 16 | 0 | 1 | 17 |
| Postmaster | 13 | 0 | 0 | 13 |
| Raw | 14 | 1 | 0 | 15 |

Fig. 7: Landscape Mode

# CHAPTER 17

# Login to the External Interface

The external interface is available at the following location.

```
https://<OTRS_HOST>/external
```

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

You need a customer user account to be able to use **OTRS**. If you do not have an account yet, please contact your administrator or follow the steps for creating an account described in the section below.

## 17.1 Login

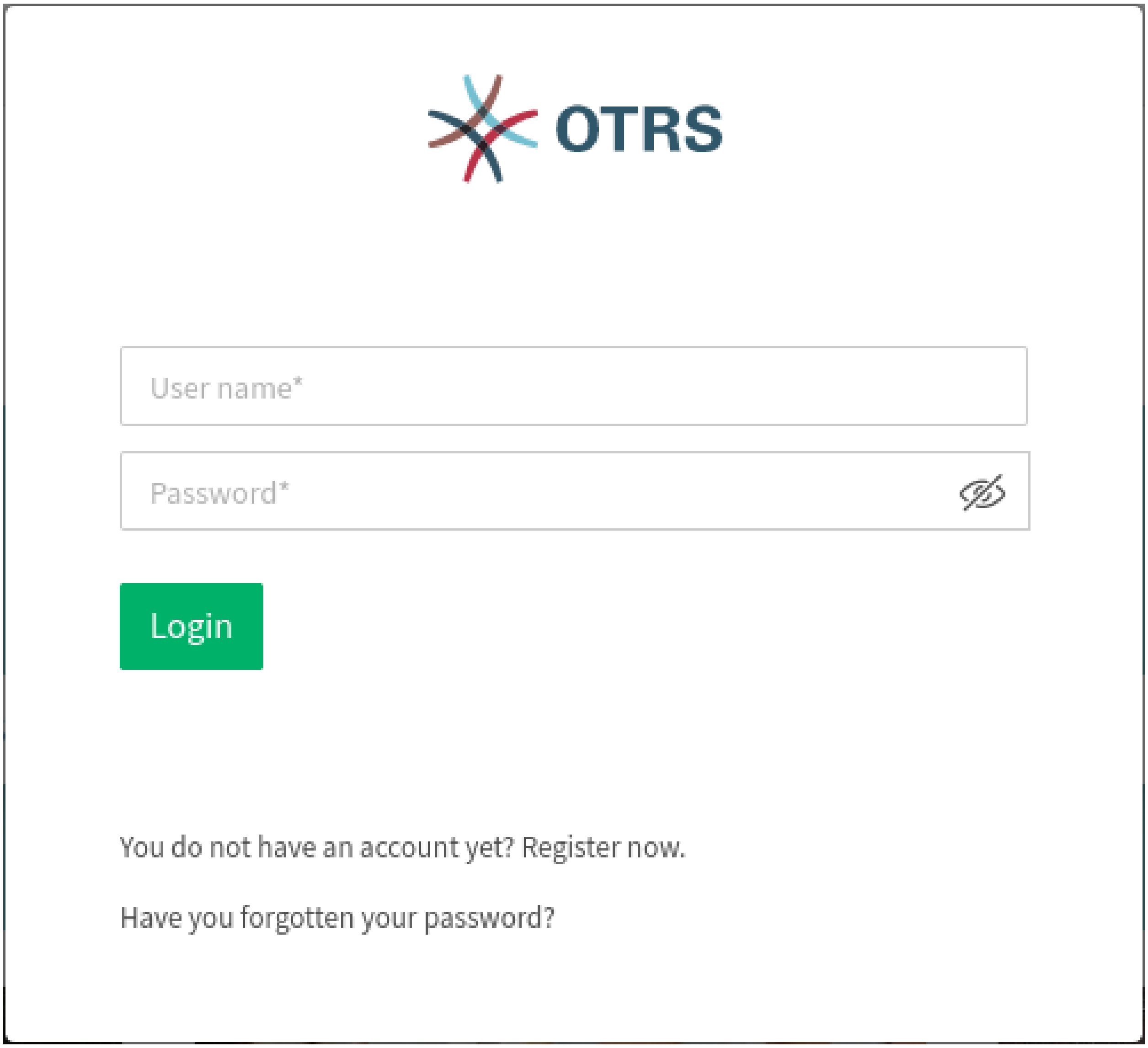
To login with an existing account:

1. Go to the login page.
2. Fill in the required fields.
3. Click on the *Login* button.

## 17.2 Create Account

1. Click on the *Login* button at the upper right corner.
2. Click the link *Register now*.
3. Fill in the fields.
4. Click on the *Register* button.

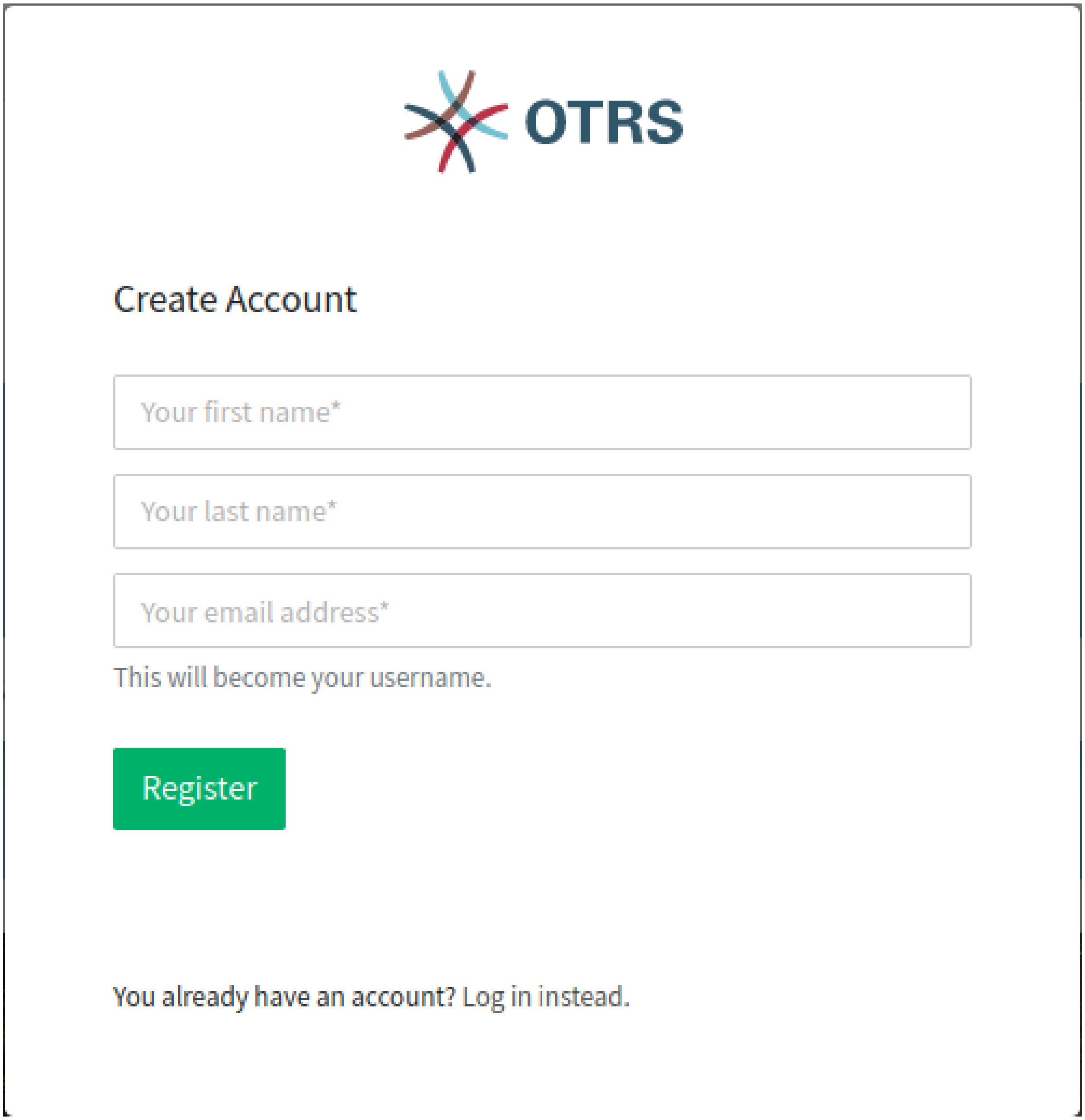
The login information will be sent to the provided email address. Log in with the password sent in the email. After logging in, you will be asked to change your password.


OTRS
User name*
Password*
Login

You do not have an account yet? Register now.

Have you forgotten your password?

Fig. 1: Login



Create Account

Your first name*
Your last name*
Your email address*

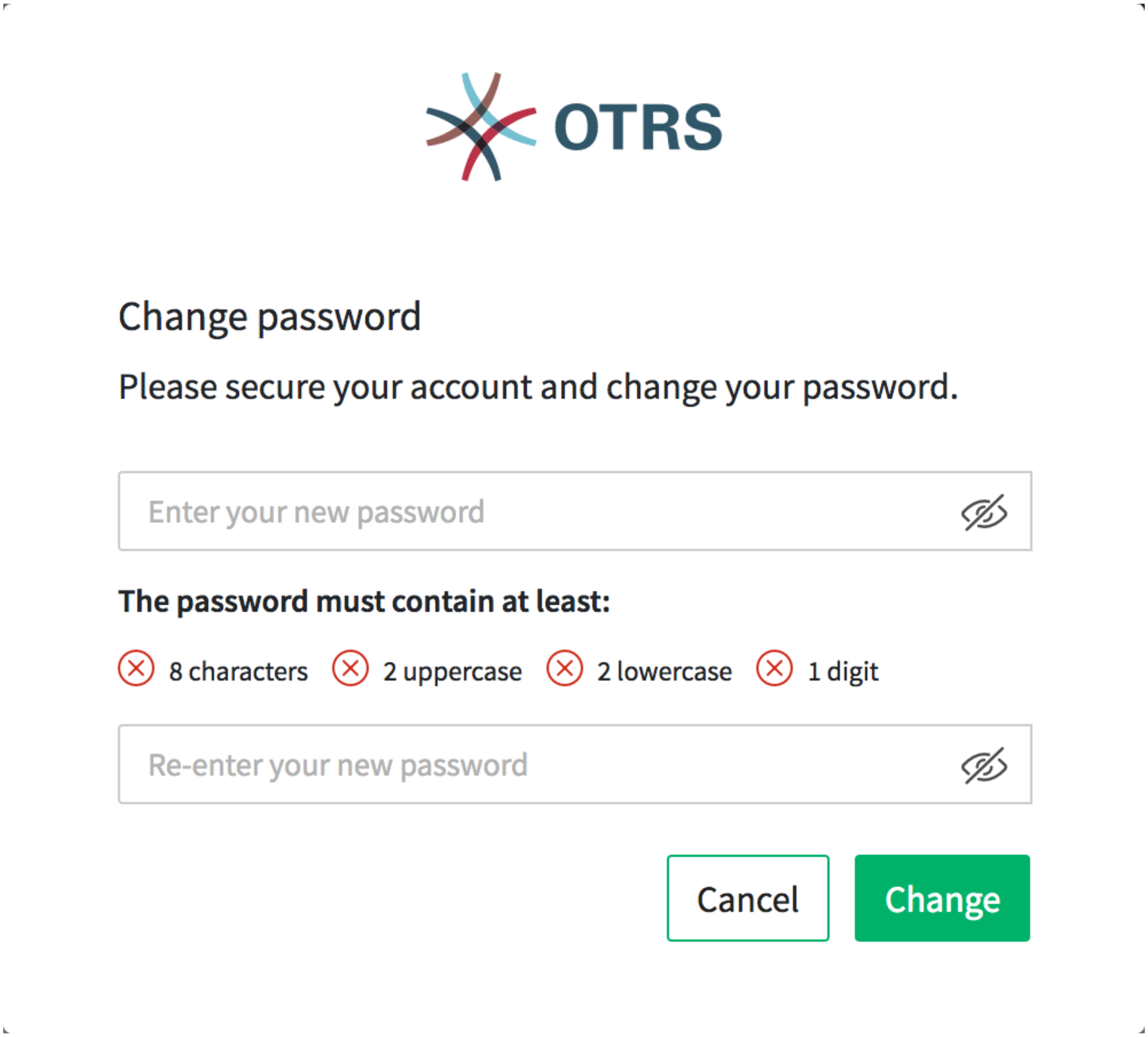
This will become your username.

Register

You already have an account? Log in instead.

Fig. 2: Create Account

## 17.3 Change Password



Change password

Please secure your account and change your password.

The password must contain at least:

OTRS
Enter your new password
ⓧ 8 characters
ⓧ 2 uppercase
ⓧ 2 lowercase
ⓧ 1 digit
Re-enter your new password
Cancel
Change

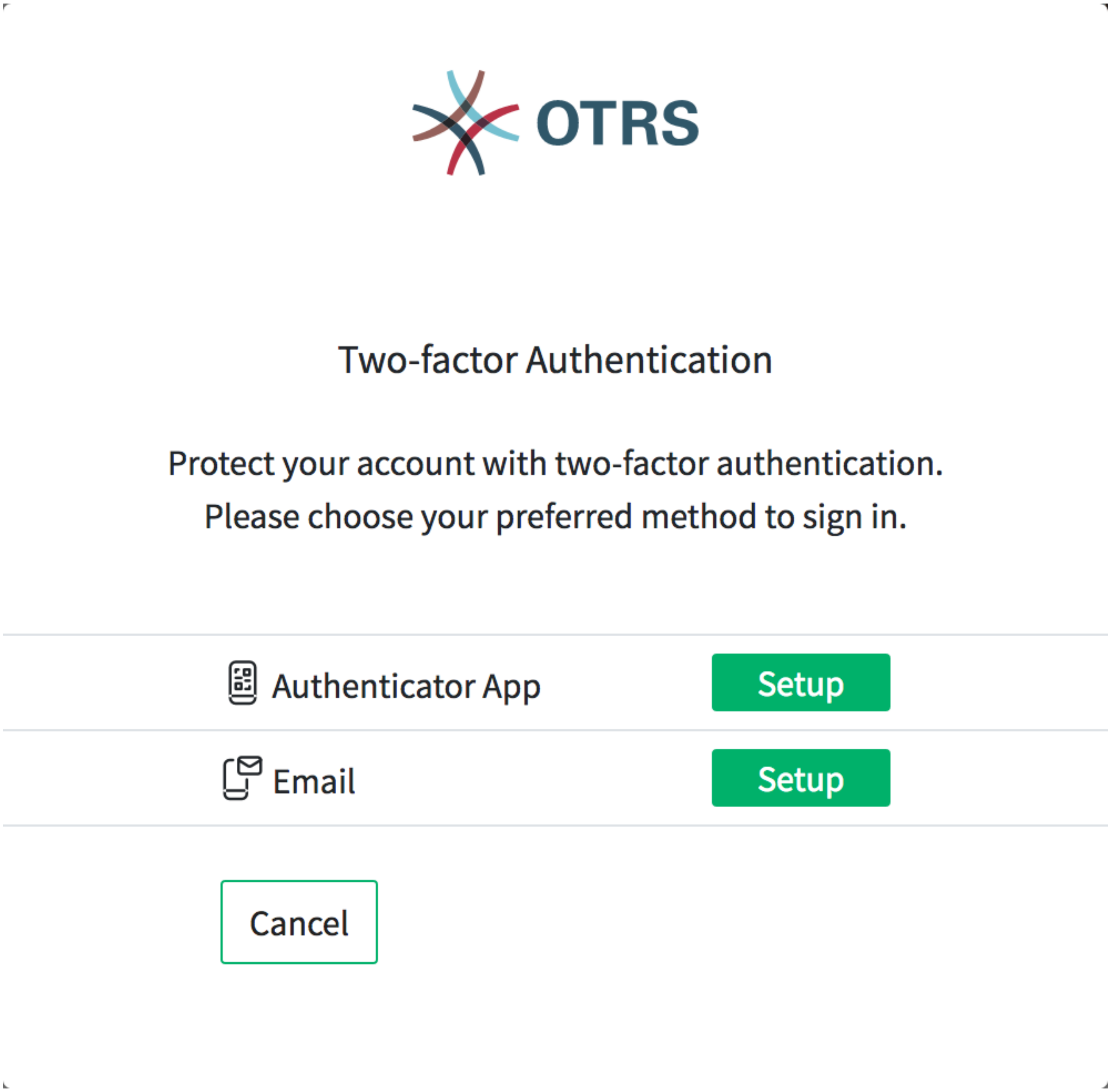
Fig. 3: Change Password

1. Fill in the fields.
2. Click on *Change* button.

After changing your password, you will be asked to set up two-factor authentication.

## 17.4 Two-factor Authentication

1. Choose your preferred authentication method.
2. Click on the *Next* button.


OTRS
Authenticator App
Setup
Email
Setup
Cancel

Two-factor Authentication

Protect your account with two-factor authentication.
Please choose your preferred method to sign in.

Fig. 4: Two-factor Authentication

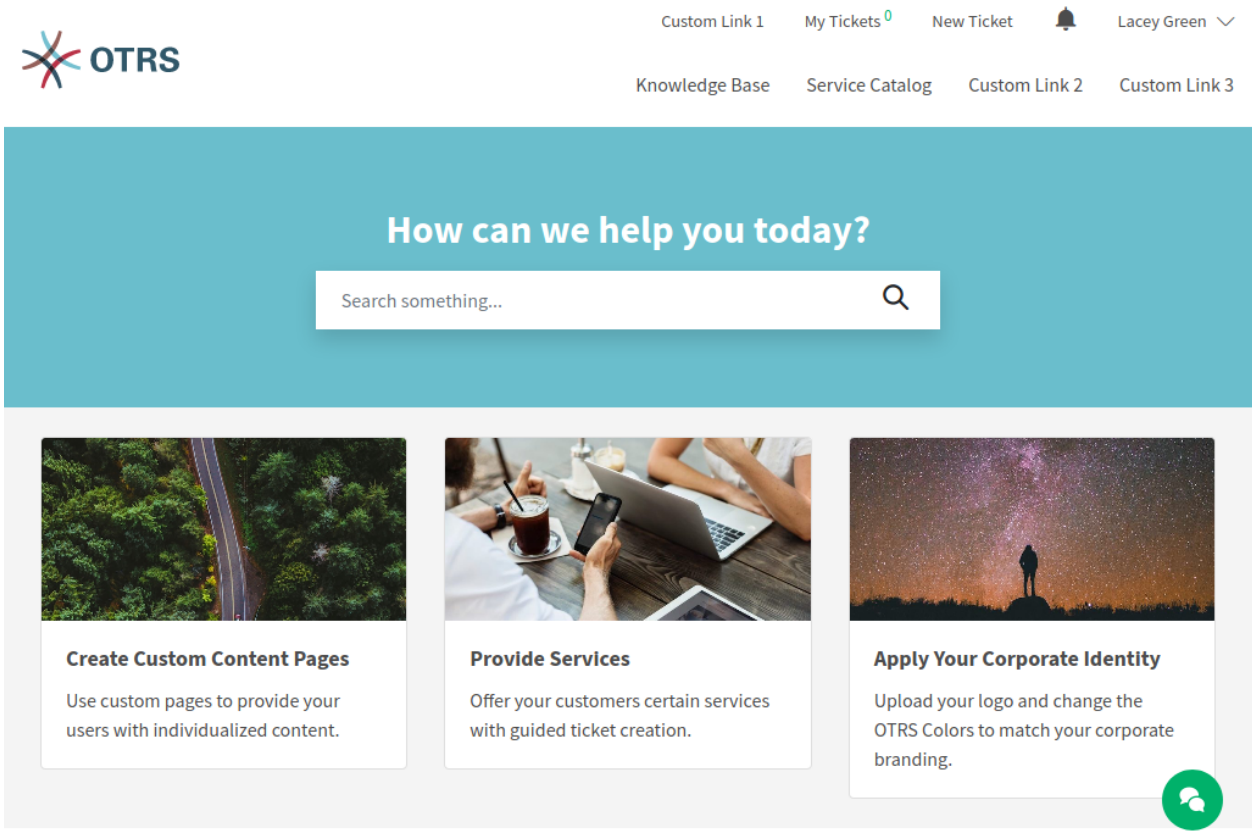
**Note:** If you select email as the authentication method, you have the option to enable email security. This means that the email is encrypted and signed when the data is sent.

Depending on the selected authentication method, the code will be displayed in the app or in the email.

1. Enter the code in the field.
2. Click on the *Verify* button.

# CHAPTER 18

# Home Page


Custom Link 1
My Tickets 0
New Ticket
Lacey Green
OTRS
Knowledge Base
Service Catalog
Custom Link 2
Custom Link 3
How can we help you today?
Search something...

**Create Custom Content Pages**

Use custom pages to provide your users with individualized content.

**Provide Services**

Offer your customers certain services with guided ticket creation.

**Apply Your Corporate Identity**

Upload your logo and change the OTRS Colors to match your corporate branding.

Fig. 1: Homepage for Logged in User

**Meta Navigation Bar** The meta navigation bar contains the login link for customer users. It can also contain other custom links depending on the settings made by the system administrator.

**Primary Navigation Bar** The primary navigation bar contains a link to the knowledge base and can also contain other custom links depending on the settings made by the system administrator.

**Main Section** The main section contains the search field and can be used to display information, such as a welcome message.

**Link List** The link list section can be used to create boxes that contain a collection of useful links.

**Image Teaser** The image teaser section can be used to show boxes that contain pictures and links.

**Content Card** The content card section can be used to show boxes that contain teaser text and links to further information.

**Footer Bar** The footer bar section contains a drop-down menu for selecting the language of the external interface.

In the right corner is the Chat icon. Clicking on this icon will open the Chat function of the external interface.

**Note:** This picture shows only the original state of the software with example content. The content of your external interface may vary depending on the settings made by the system administrator.

CHAPTER 19

# Main Navigation and Footer

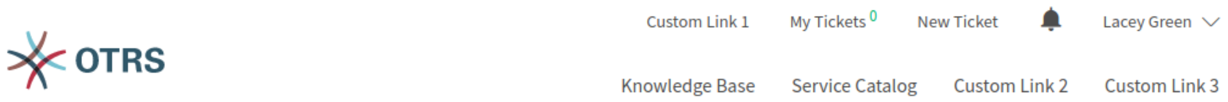

OTRS
Custom Link 1
My Tickets 0
New Ticket
Lacey Green
Knowledge Base
Service Catalog
Custom Link 2
Custom Link 3

Fig. 1: Main Navigation

The main navigation area contains the following links and symbols for a logged in customer user.

**My Tickets** This link guides users to the view *Ticket List*.

**New Ticket** This link guides users to the view *Create New Tickets*.

**Ticket Notifications** This link guides users to the view *Ticket Notifications*.

**User Name** A menu displays entries for *Personal Preferences* and a logout option when the customer user hovers over the user name in the main navigation.

**Knowledge Base** This link guides users to the view *Knowledge Base*.

**Service Catalog** This link guides users to the view *Service Catalog*.

**Custom Links** These links can be used to guide users to *Custom Pages*.

# CHAPTER 20

# Personal Preferences

The personal preferences view contains the sections *General* and *Security*.

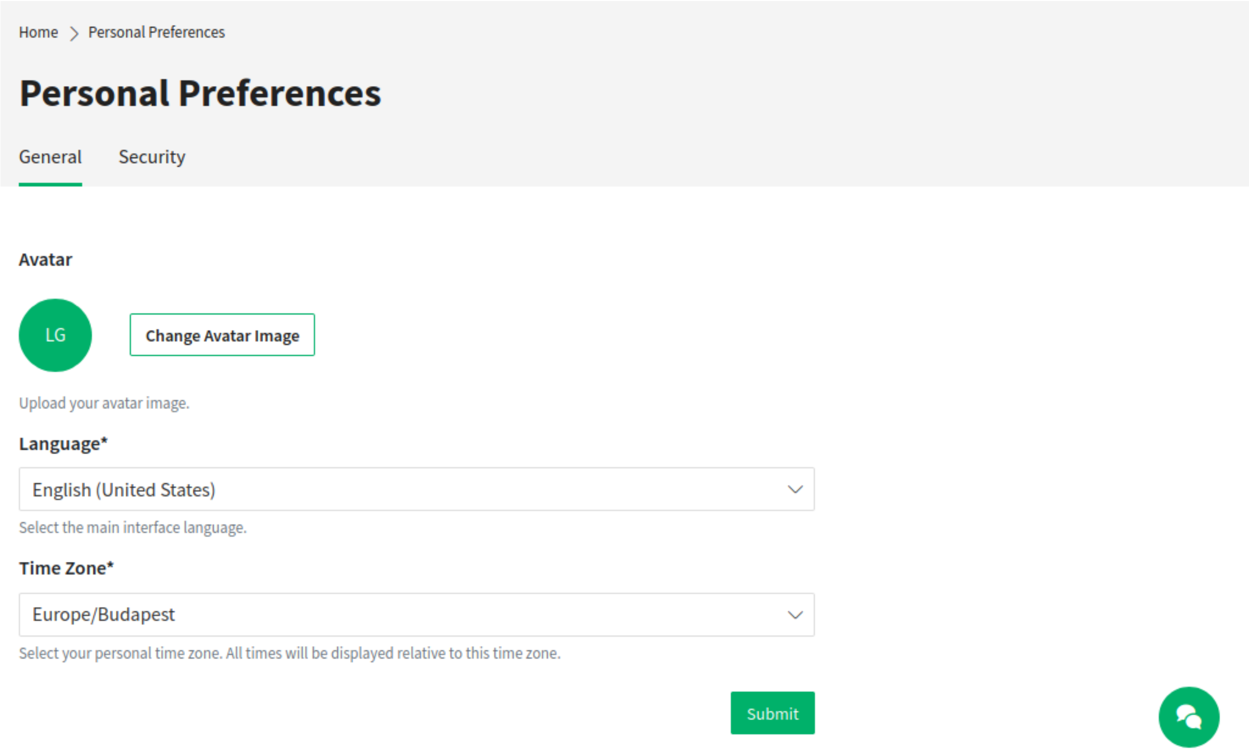
**Note:** The content of your *Personal Preferences* may vary depending on the settings made by the system administrator.

## 20.1 General

In the section *General*, the customer user can change his avatar image, the language of the external interface and the preferred time zone.

## 20.2 Security

In the section *Security*, the customer user can change his password and the two-factor authentication settings.


Home
Personal Preferences
Personal Preferences
General
Security
Avatar
LG
Change Avatar Image
Submit

Upload your avatar image.

Language*

English (United States)

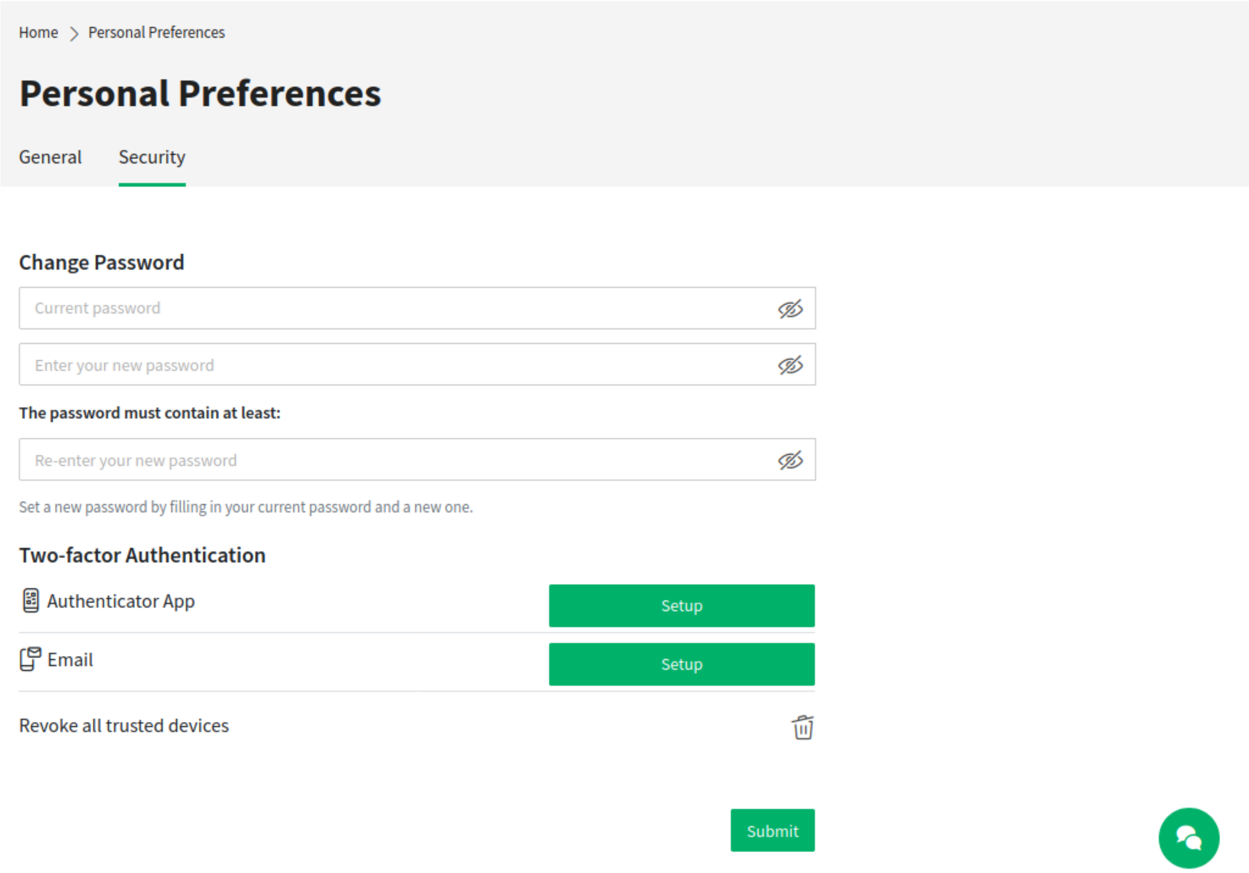
Select the main interface language.

Time Zone*

Europe/Budapest

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

Fig. 1: Personal Preferences - General


Home > Personal Preferences
General
Security
Setup
Setup
Submit

Personal Preferences

Change Password

Current password

Enter your new password

The password must contain at least:

Re-enter your new password

Set a new password by filling in your current password and a new one.

Two-factor Authentication

Authenticator App

Email

Revoke all trusted devices

Fig. 2: Personal Preferences - Security

# CHAPTER 21

# Create New Tickets

In this view, a customer user can create new tickets. The fields *Subject* and *Message* are mandatory fields. The field *Attachment* can be used optionally for adding attachments to the ticket.

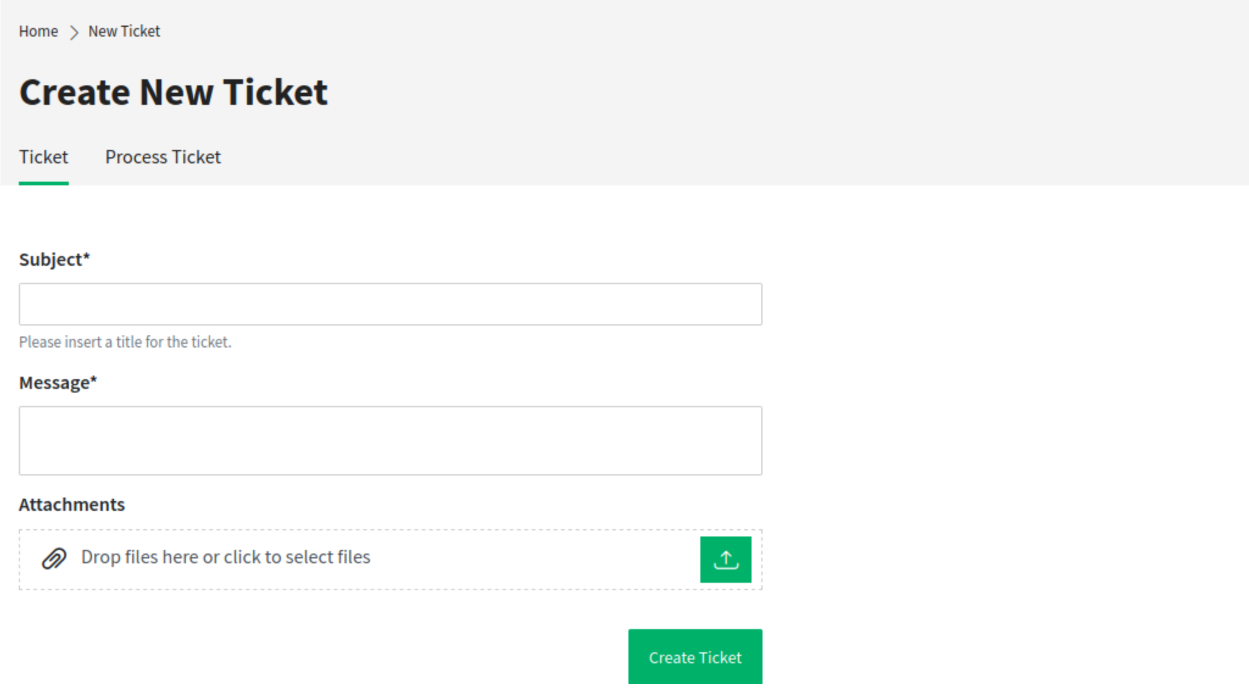

Home > New Ticket
Create New Ticket
Ticket
Process Ticket
Subject*
Please insert a title for the ticket.
Message*
Attachments
Drop files here or click to select files
Create Ticket

Fig. 1: Create New Ticket

The text editor of the *Message* field offers the following options:

- Marking text as bold or italic
- Adding links

- Adding a numbered or a bulleted list
- Text alignment
- Inserting block quotes
- Inserting tables
- Inserting pictures

Related knowledge base articles are displayed based on the keywords entered in the *Subject* and/or the *Message* fields. Clicking on a knowledge base article opens the *Knowledge Base* screen.

The related knowledge base articles are displayed as the customer user types, so the list of suggested knowledge base articles is updated after any word typed into the *Subject* and/or the *Message* fields. The suggested knowledge base articles are sorted based on the number of matched keywords.

After creating the ticket and clicking the *Create Ticket* button, the customer user is taken to the *Ticket List* view. The created ticket is displayed in the list view next to any other already-created tickets.

Now, the newly-created ticket will appear as a new ticket in the agent interface views.

Process tickets can also be created in the Create New Tickets view if there are available processes deployed in the system. The relevant process can be selected in the drop-down menu.

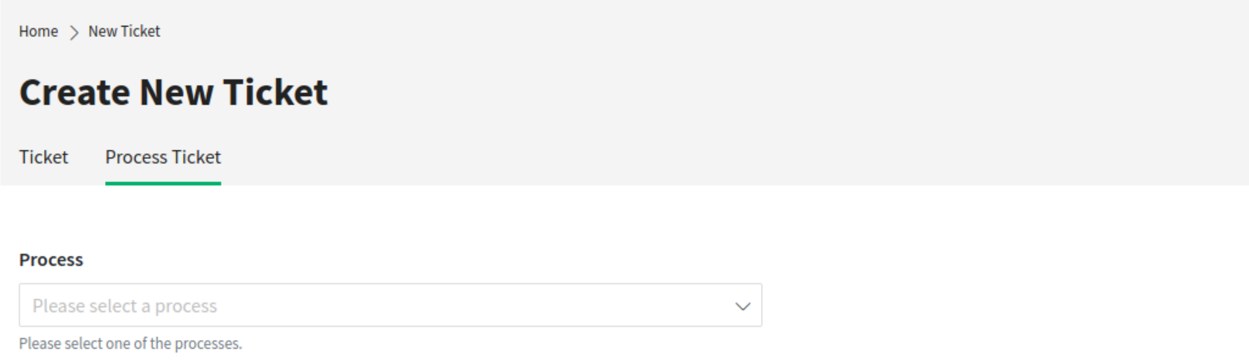


Fig. 2: Create Process Ticket

After selecting a process, the view for creating tickets is opened and the process ticket can be created. The editable fields in this view are defined by the relevant process.

# CHAPTER 22

# Ticket List

The ticket list displays the tickets of the logged in customer user and the company tickets. The *Search* field in this section enables the customer user to search for certain tickets by ticket title or ticket number.

Tickets with bold texts have unread articles. The colored circles in the first column have the following meanings:

- Blue circle = Open tickets with read or unread articles.
- Grey circle = Closed tickets.

**Note:** The columns shown in the ticket list can be defined in the administrator interface. It is possible to define if the title of the ticket should be shown or if the last subject should be used instead. It is possible to add additional columns, like *Owner*, *Queue* or *Dynamic Fields*.

**Note:** The color can be different if a corporate design is applied to the external interface by the administrator.

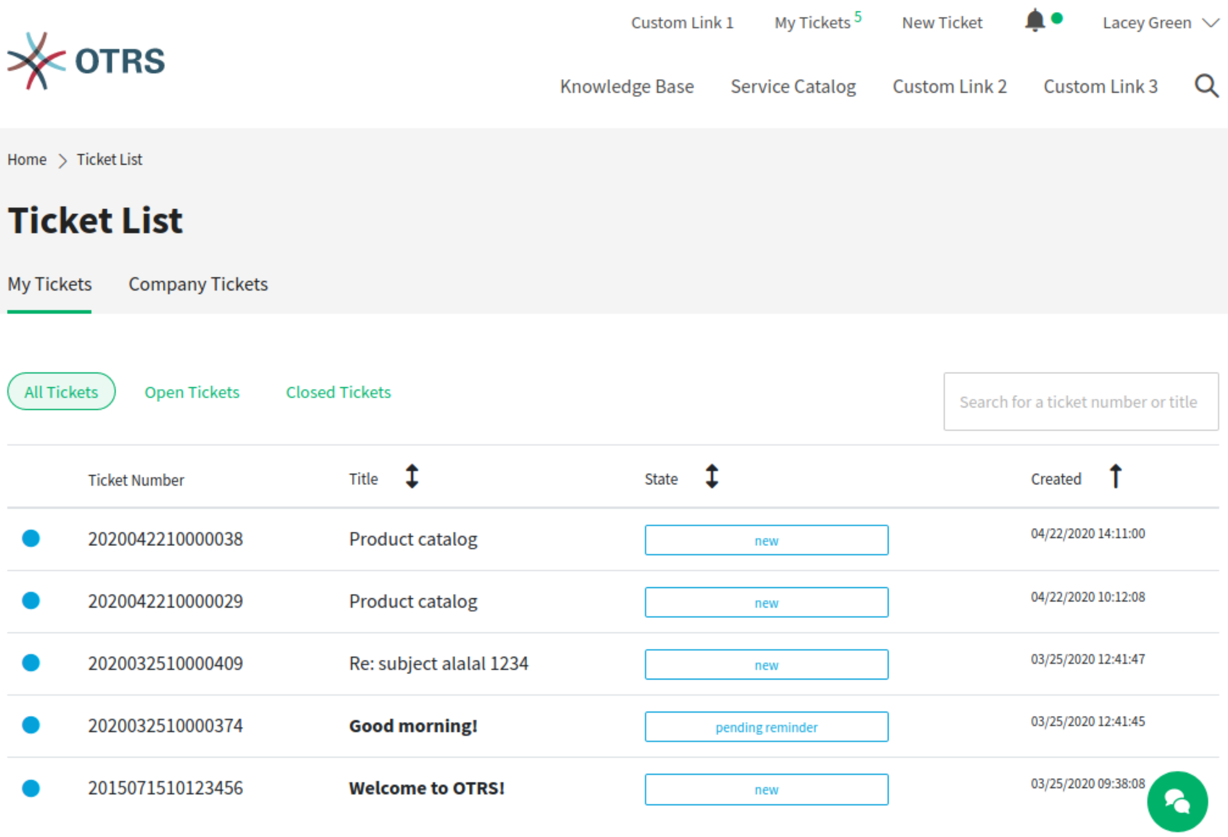
## 22.1 My Tickets

The view in this section shows tickets that have been created by the currently logged in customer user.

**All Tickets** This view shows all tickets of the currently logged in customer user.

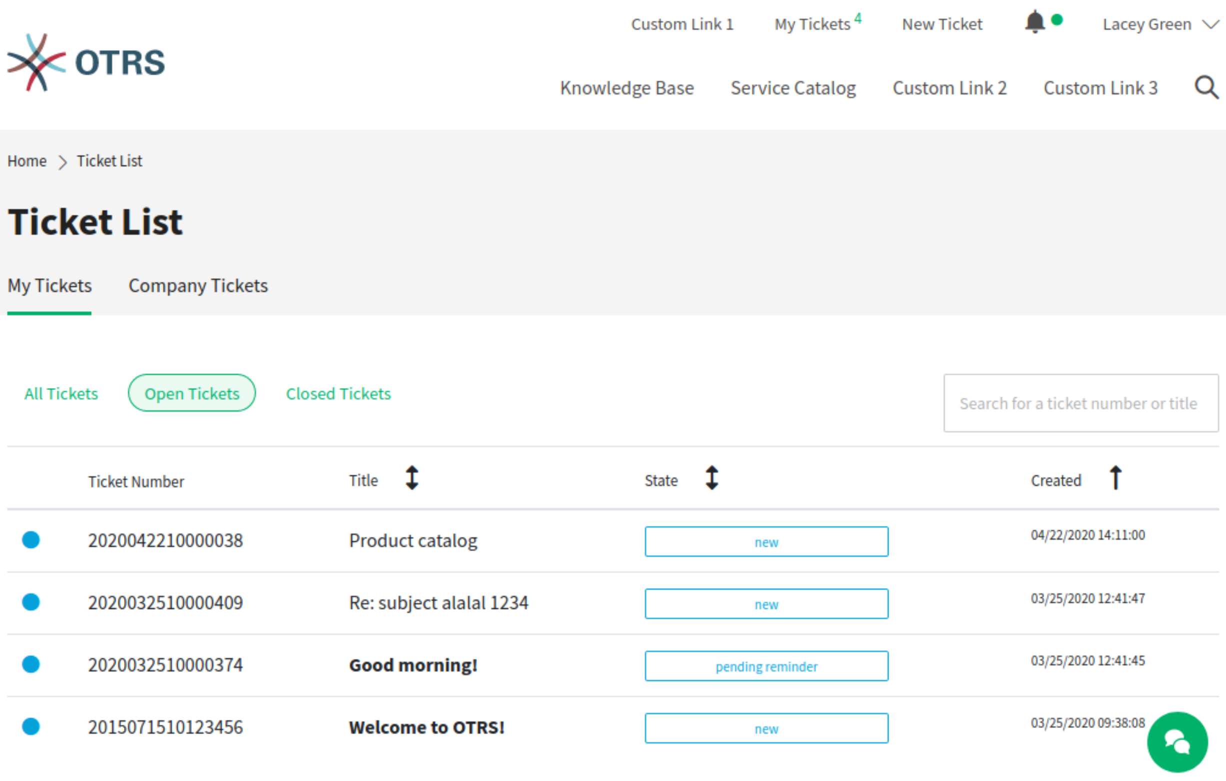
**Open Tickets** This view shows all tickets of the currently logged in customer user that are not yet closed. Pending tickets are also displayed here.

**Closed Tickets** This view shows all tickets of the currently logged in customer user that are in *Closed* status.


OTRS
Custom Link 1
My Tickets 5
New Ticket
Lacey Green
Knowledge Base
Service Catalog
Custom Link 2
Custom Link 3
Home > Ticket List
Ticket List
My Tickets
Company Tickets
All Tickets
Open Tickets
Closed Tickets
Search for a ticket number or title

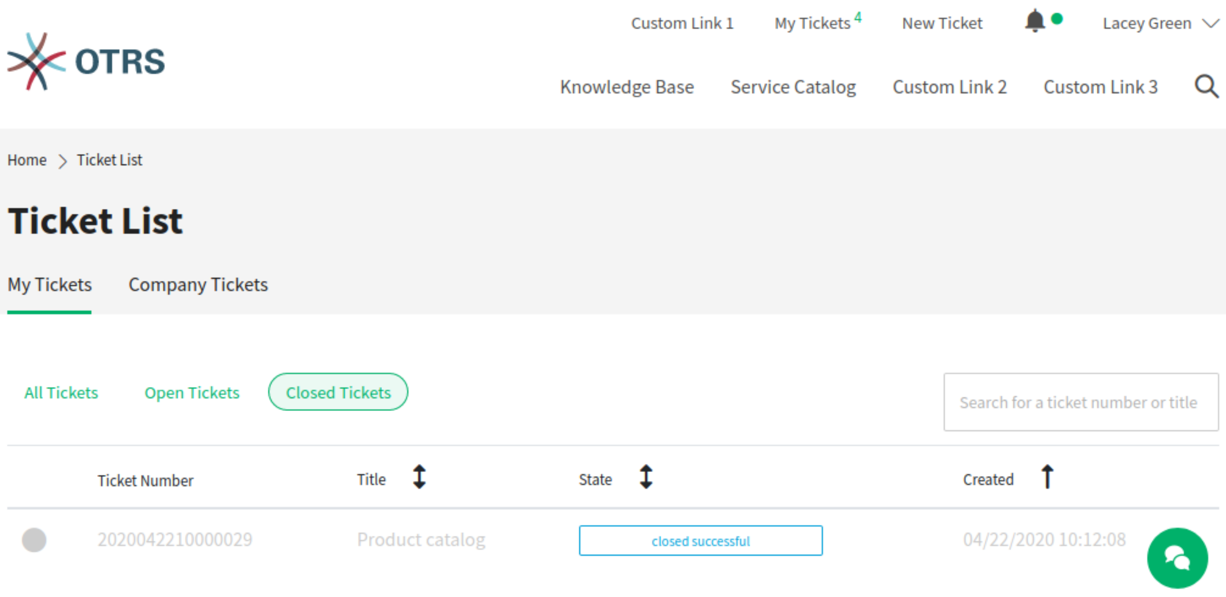
| | Ticket Number | Title | State | Created |
|---|---|---|---|---|
| ● | 2020042210000038 | Product catalog | new | 04/22/2020 14:11:00 |
| ● | 2020042210000029 | Product catalog | new | 04/22/2020 10:12:08 |
| ● | 2020032510000409 | Re: subject alalal 1234 | new | 03/25/2020 12:41:47 |
| ● | 2020032510000374 | **Good morning!** | pending reminder | 03/25/2020 12:41:45 |
| ● | 2015071510123456 | **Welcome to OTRS!** | new | 03/25/2020 09:38:08 |

Fig. 1: My Tickets - All Tickets


OTRS
Custom Link 1
My Tickets 4
New Ticket
Lacey Green
Knowledge Base
Service Catalog
Custom Link 2
Custom Link 3
Home > Ticket List
Ticket List
My Tickets
Company Tickets
All Tickets
Open Tickets
Closed Tickets
Search for a ticket number or title

| | Ticket Number | Title | State | Created |
|---|---|---|---|---|
| ● | 2020042210000038 | Product catalog | new | 04/22/2020 14:11:00 |
| ● | 2020032510000409 | Re: subject alalal 1234 | new | 03/25/2020 12:41:47 |
| ● | 2020032510000374 | **Good morning!** | pending reminder | 03/25/2020 12:41:45 |
| ● | 2015071510123456 | **Welcome to OTRS!** | new | 03/25/2020 09:38:08 |

Fig. 2: My Tickets - Open Tickets


OTRS
Custom Link 1
My Tickets 4
New Ticket
Lacey Green
Knowledge Base
Service Catalog
Custom Link 2
Custom Link 3
Home > Ticket List
Ticket List
My Tickets
Company Tickets
All Tickets
Open Tickets
Closed Tickets
Search for a ticket number or title

| | Ticket Number | Title | State | Created |
|---|---|---|---|---|
| ● | 2020042210000029 | Product catalog | closed successful | 04/22/2020 10:12:08 |

Fig. 3: My Tickets - Closed Tickets

## 22.2 Company Tickets

The view in this section shows all tickets assigned to a certain customer. All customer users assigned to this certain customer can see the content in this list.

## CHAPTER 23

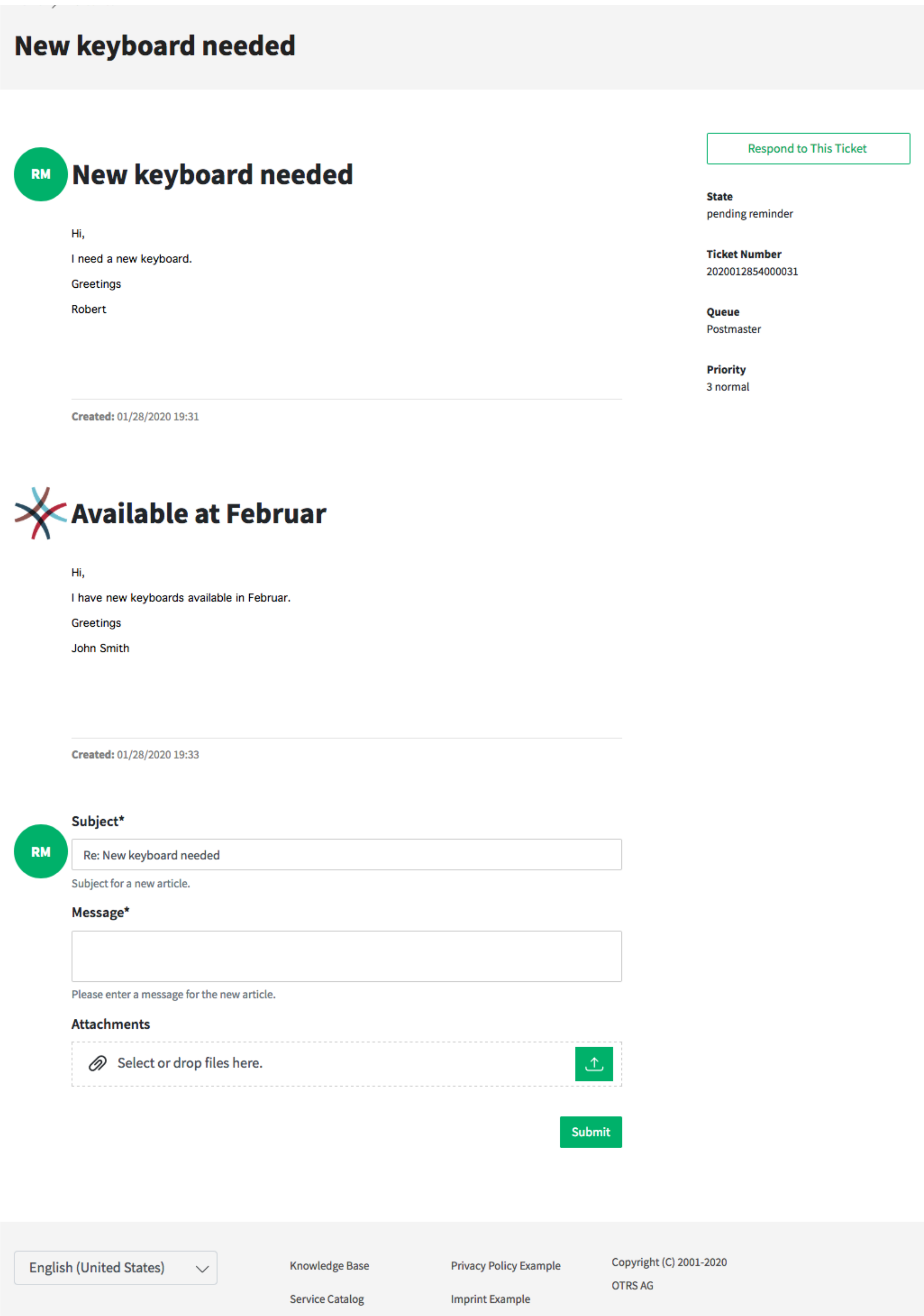
# Ticket Detail View

The ticket detail view displays the complete communication within the ticket.

The articles are displayed in a list that, by default, starts with the first article. At the right side, the following ticket information displays by default:

- State
- Ticket number
- Queue
- Priority

At the end of the article list is the section for writing a response to the ticket. The button *Respond to This Ticket* at the right side scrolls the user directly to the response section of the view.


RM
Respond to This Ticket
RM
Select or drop files here.
Submit
English (United States)
Knowledge Base
Service Catalog
Privacy Policy Example
Imprint Example
Copyright (C) 2001-2020
OTRS AG

New keyboard needed

New keyboard needed

Hi,

I need a new keyboard.

Greetings

Robert

**Created:** 01/28/2020 19:31

**State**
pending reminder

**Ticket Number**
2020012854000031

**Queue**
Postmaster

**Priority**
3 normal

Available at Februar

Hi,

I have new keyboards available in Februar.

Greetings

John Smith

**Created:** 01/28/2020 19:33

**Subject***
Re: New keyboard needed
Subject for a new article.

**Message***

Please enter a message for the new article.

**Attachments**

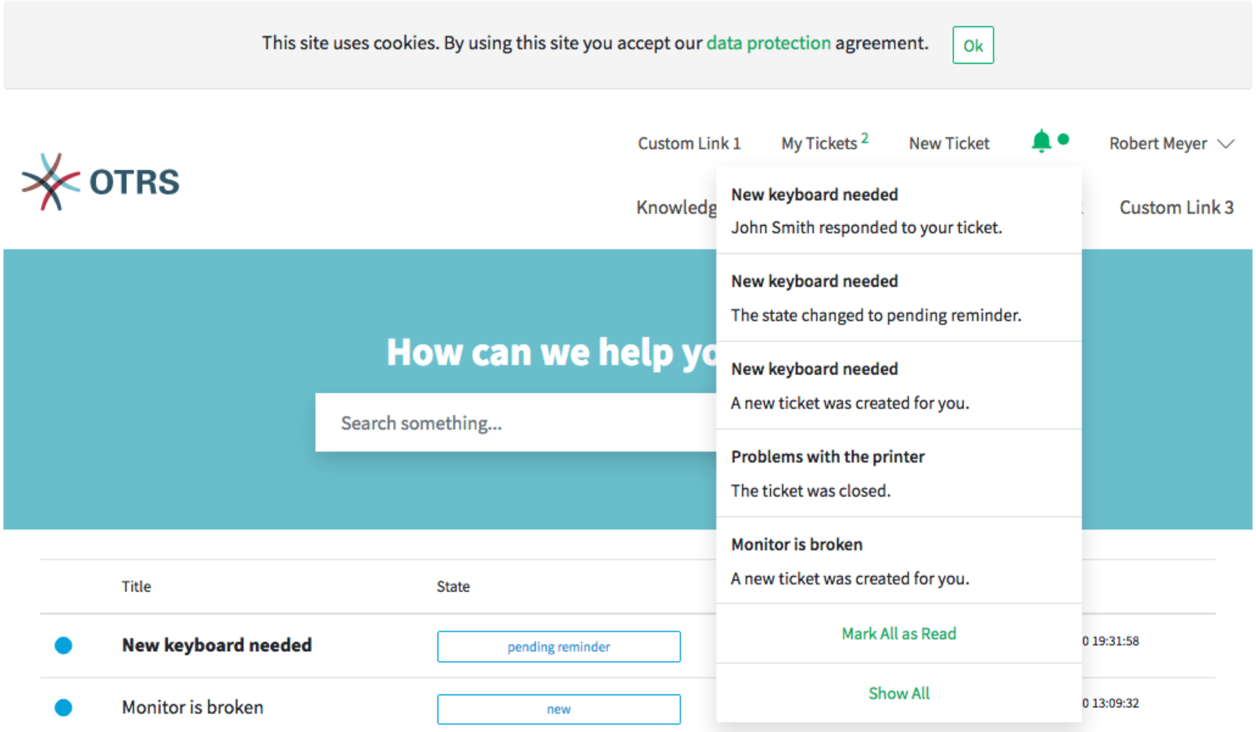
Fig. 1: Ticket Detail View

CHAPTER 24

# Ticket Notifications

The ticket notifications inform the logged in customer user about:

- Newly created tickets related to the customer user
- Responses from agents to the customer users tickets
- State changes of a ticket



This site uses cookies. By using this site you accept our data protection agreement.

**New keyboard needed**
John Smith responded to your ticket.

**New keyboard needed**
The state changed to pending reminder.

**New keyboard needed**
A new ticket was created for you.

**Problems with the printer**
The ticket was closed.

**Monitor is broken**
A new ticket was created for you.

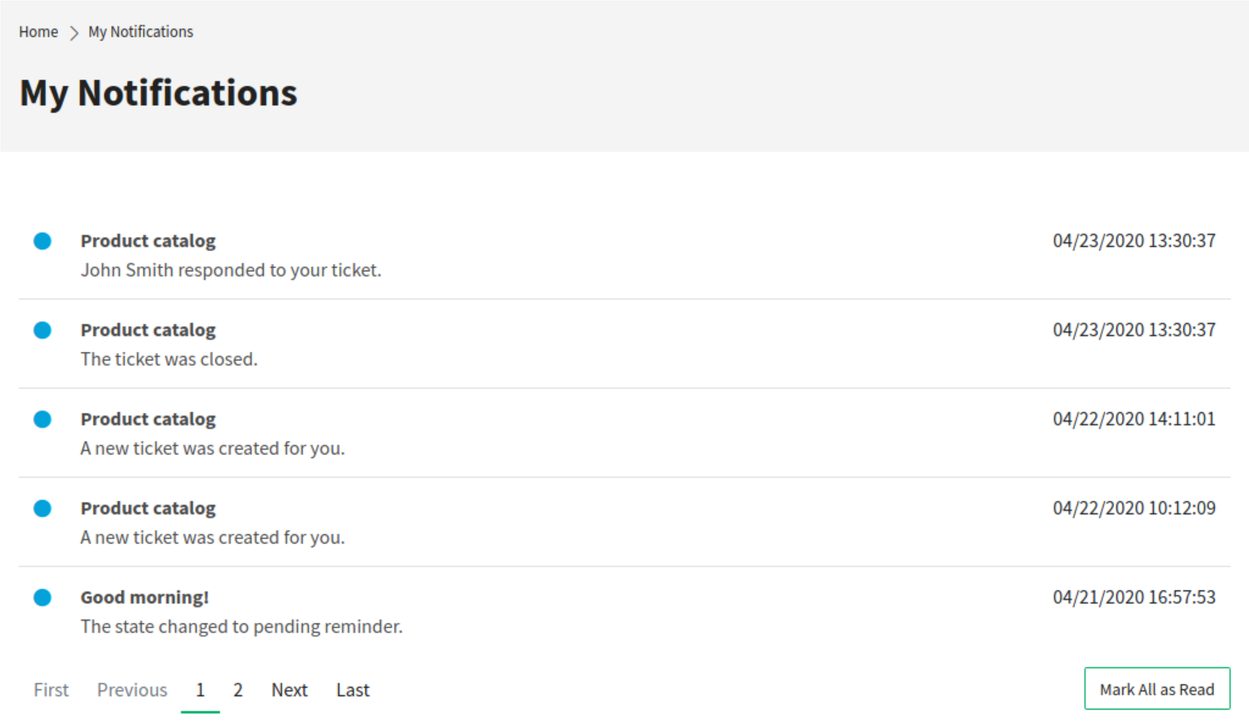
Ok
OTRS
Custom Link 1
My Tickets 2
New Ticket
Robert Meyer
Knowledg
Custom Link 3
How can we help yo
Search something...
Mark All as Read
Show All
Title
State
New keyboard needed
pending reminder
0 19:31:58
Monitor is broken
new
0 13:09:32

Fig. 1: Notification Screen on Hover

The bell icon in the meta navigation bar informs users about new unread ticket notifications. If the bell icon has an additional green circle, there are new unread notifications. When the customer user hovers over the icon, a short overview of the last five ticket notifications is displayed.

The customer user can mark them as read or open the view *My Notifications*.

**My Notifications** This view displays all notifications with their date and time, regardless of whether they are marked as read or unread. Unread notifications have bold titles. When the customer user hovers the mouse over an entry in the list, the entry is highlighted.



Home > My Notifications

My Notifications

● **Product catalog** 04/23/2020 13:30:37
John Smith responded to your ticket.

● **Product catalog** 04/23/2020 13:30:37
The ticket was closed.

● **Product catalog** 04/22/2020 14:11:01
A new ticket was created for you.

● **Product catalog** 04/22/2020 10:12:09
A new ticket was created for you.

● **Good morning!** 04/21/2020 16:57:53
The state changed to pending reminder.

Fig. 2: My Notifications - All

If the customer user then clicks on an entry with the mouse, the corresponding ticket is displayed in the *Ticket Detail View*. If the customer user clicks the blue circle near the titles he can set the ticket notifications to read or unread.

# CHAPTER 25

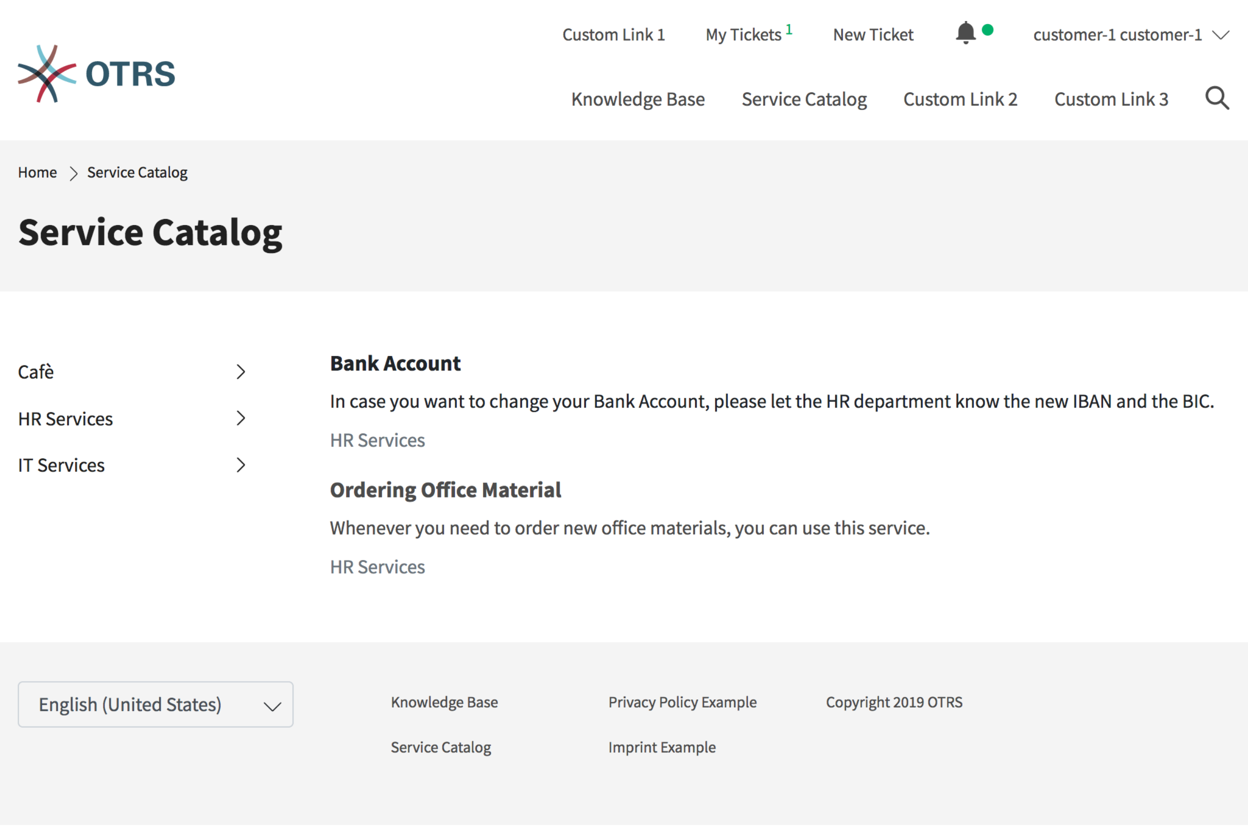
# Service Catalog

The service catalog section can be used to display service catalog information and to categorize the information. The service catalog categories are shown in alphabetical order on the left side of the view.

In addition to plain text, the service catalog entries can also contain links to other pages. For entries with links, item title and text are highlighted when the customer user hovers over the entry. If the customer users clicks the hovered-over entry, he will be guided to the linked page.

If subcategories are defined within a category, the subcategories are shown if the customer user hovers over a category.

**Note:** If there are items that are not assigned to a category, these items are displayed first when the view is called up. If all items are assigned to categories, the items that have been clicked on the most are displayed first.


OTRS
Custom Link 1
My Tickets 1
New Ticket
customer-1 customer-1
Knowledge Base
Service Catalog
Custom Link 2
Custom Link 3
Home
Service Catalog
Cafè
HR Services
IT Services
English (United States)
Knowledge Base
Service Catalog
Privacy Policy Example
Imprint Example
Copyright 2019 OTRS

Service Catalog

**Bank Account**

In case you want to change your Bank Account, please let the HR department know the new IBAN and the BIC.

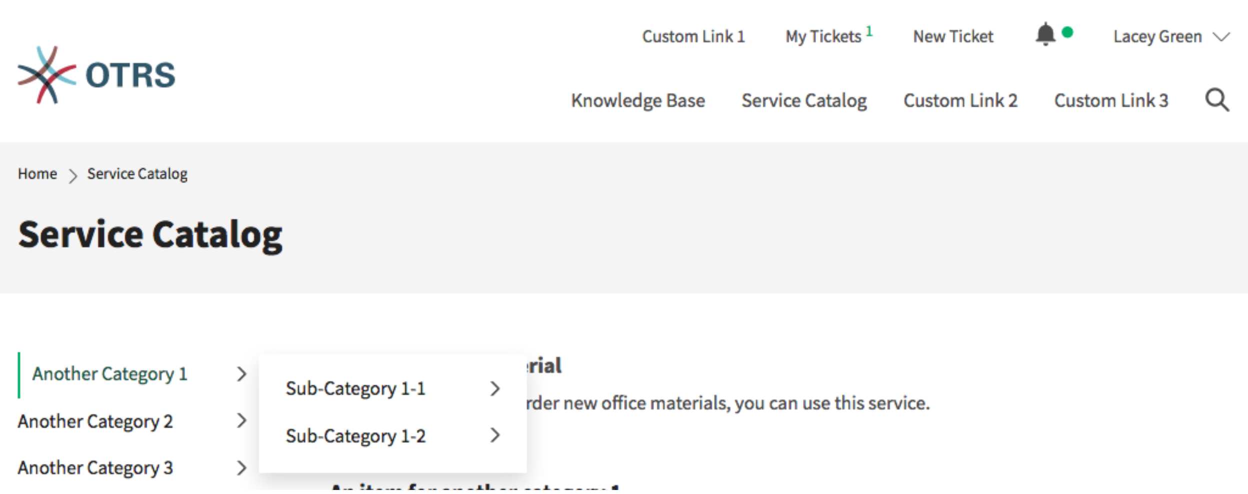
HR Services

**Ordering Office Material**

Whenever you need to order new office materials, you can use this service.

HR Services

Fig. 1: Service Catalog


OTRS
Custom Link 1
My Tickets 1
New Ticket
Lacey Green
Knowledge Base
Service Catalog
Custom Link 2
Custom Link 3
Home
Service Catalog
Another Category 1
Another Category 2
Another Category 3
Sub-Category 1-1
Sub-Category 1-2

Service Catalog

**rial**

rder new office materials, you can use this service.

Fig. 2: Catalog with Subcategories

# CHAPTER 26

# Knowledge Base

The knowledge base area can be used to display knowledge base articles for customers and customer users. The knowledge base articles can be grouped into categories.

**Note:** To display a knowledge base article in the external interface, the state of the article needs to be *External (customer)* or *Public (all)*. If the state is set to *External (customer)*, the knowledge base article will be shown only for logged in customer users. If the state is set to *Public (all)*, the knowledge base article will also be visible users who are not logged in.

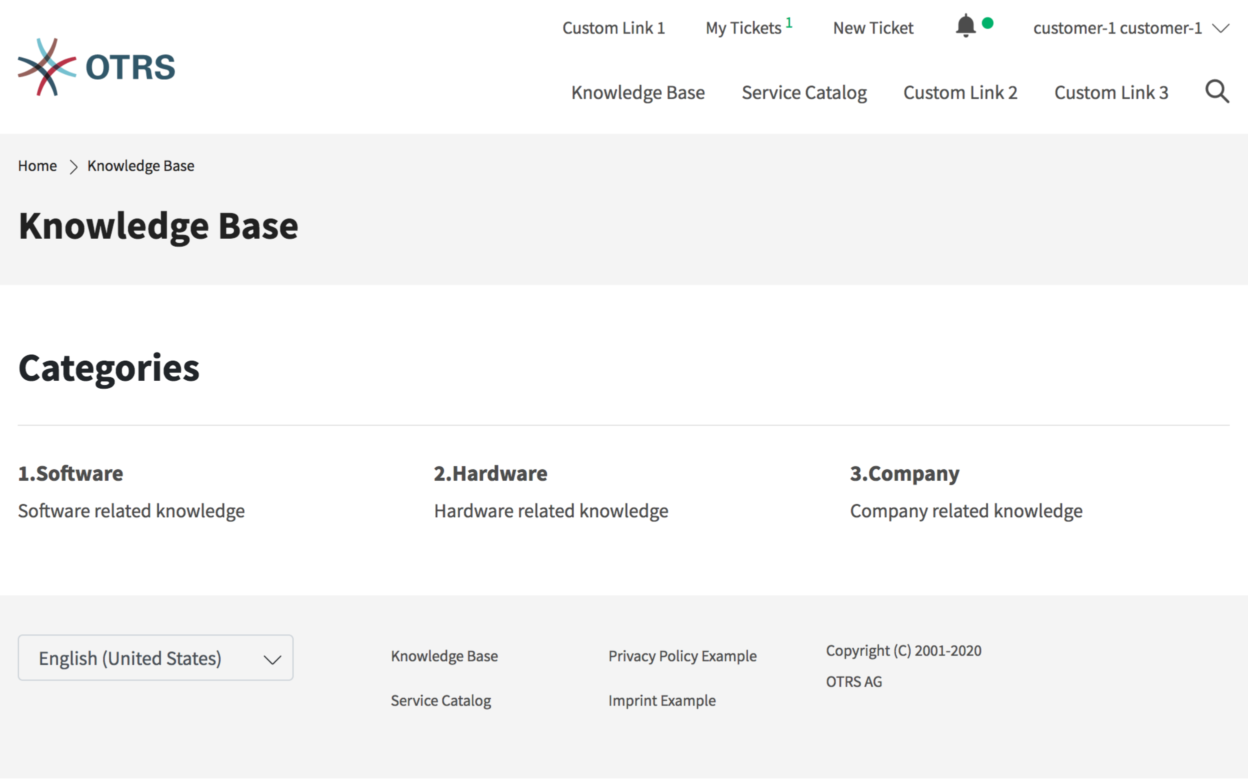
Clicking on an article title opens the detail view of the article.

The detail view of the article can contain the sections:

- Symptom
- Problem
- Solution
- Rating

**Note:** The sections *Symptom*, *Problem* and *Solution* are only displayed if the corresponding field is filled with text when the article is created.

At the end of the article, the customer users can vote for the article. The results of the votes are displayed in the knowledge base article detail views.



Custom Link 1
My Tickets 1
New Ticket
customer-1 customer-1
OTRS
Knowledge Base
Service Catalog
Custom Link 2
Custom Link 3
Home
Knowledge Base

Knowledge Base

Categories

1.Software

Software related knowledge

2.Hardware

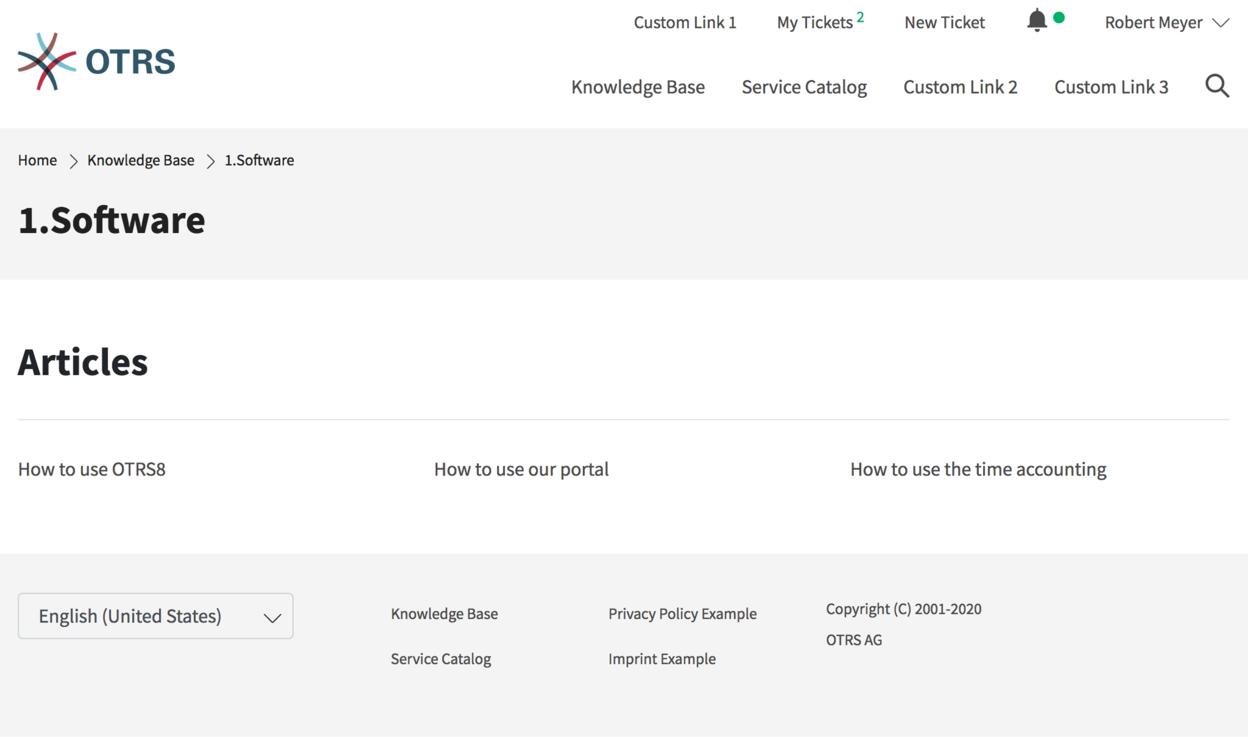
Hardware related knowledge

3.Company

Company related knowledge

English (United States)
Knowledge Base
Service Catalog
Privacy Policy Example
Imprint Example
Copyright (C) 2001-2020
OTRS AG

Fig. 1: Knowledge Base Categories



Custom Link 1
My Tickets 2
New Ticket
Robert Meyer
OTRS
Knowledge Base
Service Catalog
Custom Link 2
Custom Link 3
Home
Knowledge Base
1.Software

1.Software

Articles

How to use OTRS8

How to use our portal

How to use the time accounting

English (United States)
Knowledge Base
Service Catalog
Privacy Policy Example
Imprint Example
Copyright (C) 2001-2020
OTRS AG

Fig. 2: Knowledge Base Article

# CHAPTER 27

# Search

The search engine for the search function uses the functionality of Elasticsearch. Customers can use the search function to find a relevant terms in:

- Tickets
- Articles
- Knowledge base articles
- Contents of service catalogs
- Contents of custom pages

# CHAPTER 28

# Custom Pages

The links on custom pages can be used to link to other webpages. The content allowed on custom pages depends on the settings that a system administrator has made.

# CHAPTER 29

# Chat

Customer users are not able to start a chat directly with a certain agent, but can only create generic chat requests. The agents can also send chat requests to customer users.

## 29.1 Customer User To Agent

To start a chat with an agent:

1. Click on the *New conversation* button within the chat window in the bottom right corner of the external interface.
2. Select the relevant chat channel, if there are defined chat channels.
3. Type an initial message for the chat request.
4. When an agent accepts the chat request, the chat will open and you can type your messages.

## 29.2 Public User to Agent

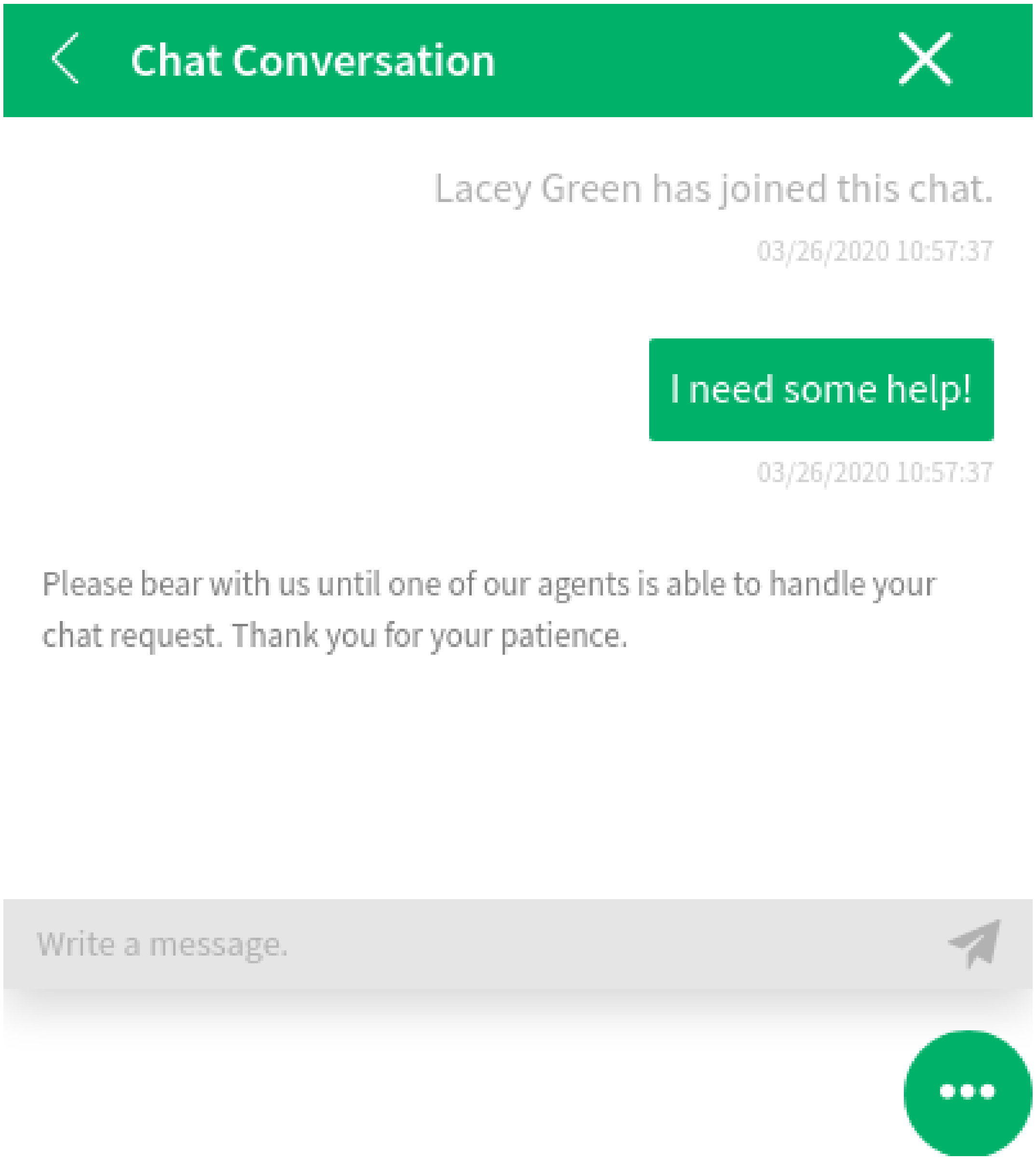
Visitors of the external interface are also not able to start a chat directly with a certain agent, but can only create generic chat requests. As they are not logged in, they need to add a name to start the chat.

The steps are the same as described in *Customer User to Agent* section.

### 29.2.1 Agent to Customer User

To receive a chat request from an agent:

1. An agent types an initial message to create a chat request.
2. A browser notification is displayed to inform you. You have to accept the chat request which is displayed in the bottom right corner of the external interface.



Chat Conversation

Lacey Green has joined this chat.

03/26/2020 10:57:37

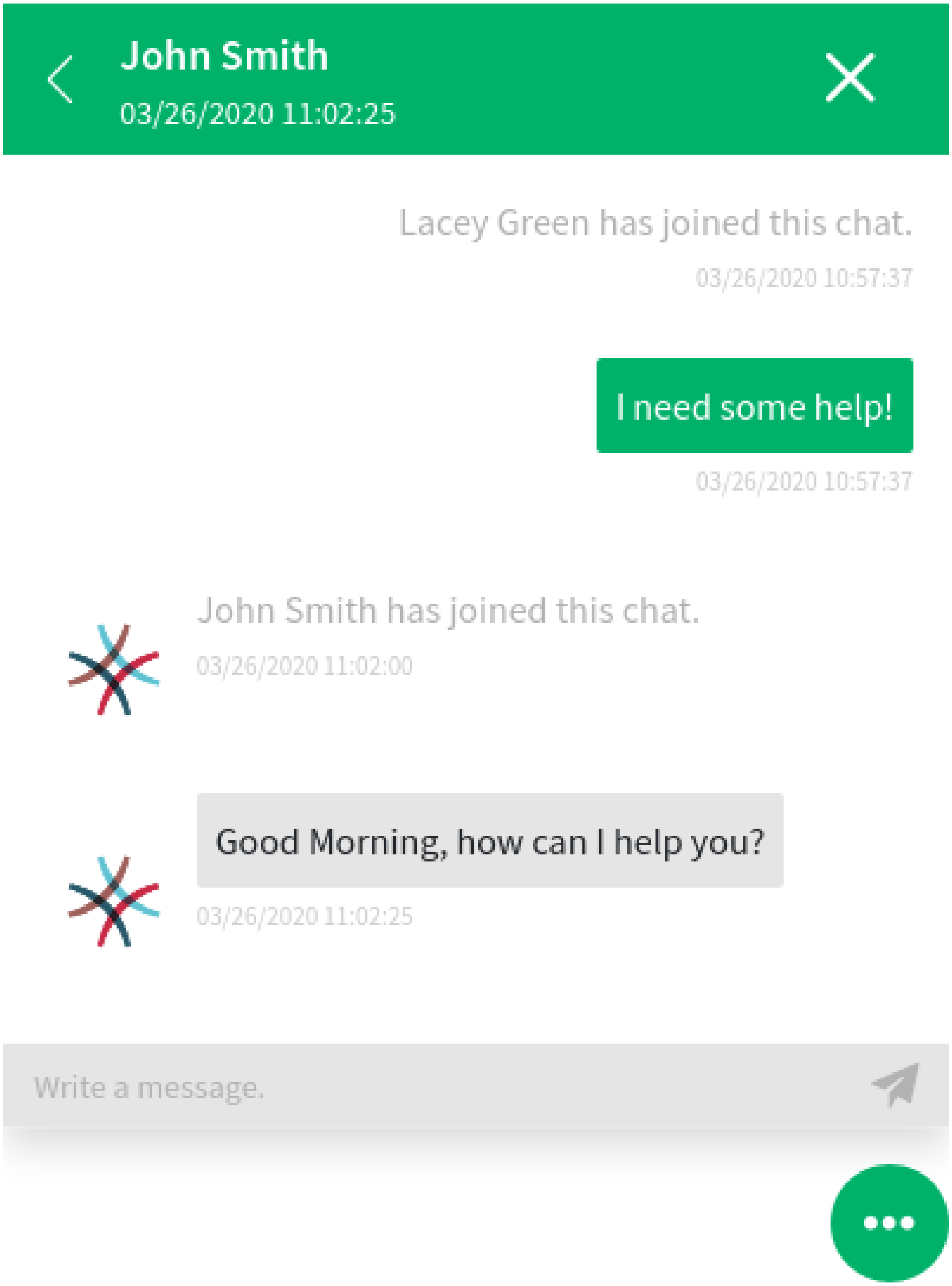
I need some help!

03/26/2020 10:57:37

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

Write a message.

Fig. 1: Start Chat Window



John Smith

03/26/2020 11:02:25

Lacey Green has joined this chat.

03/26/2020 10:57:37

I need some help!

03/26/2020 10:57:37

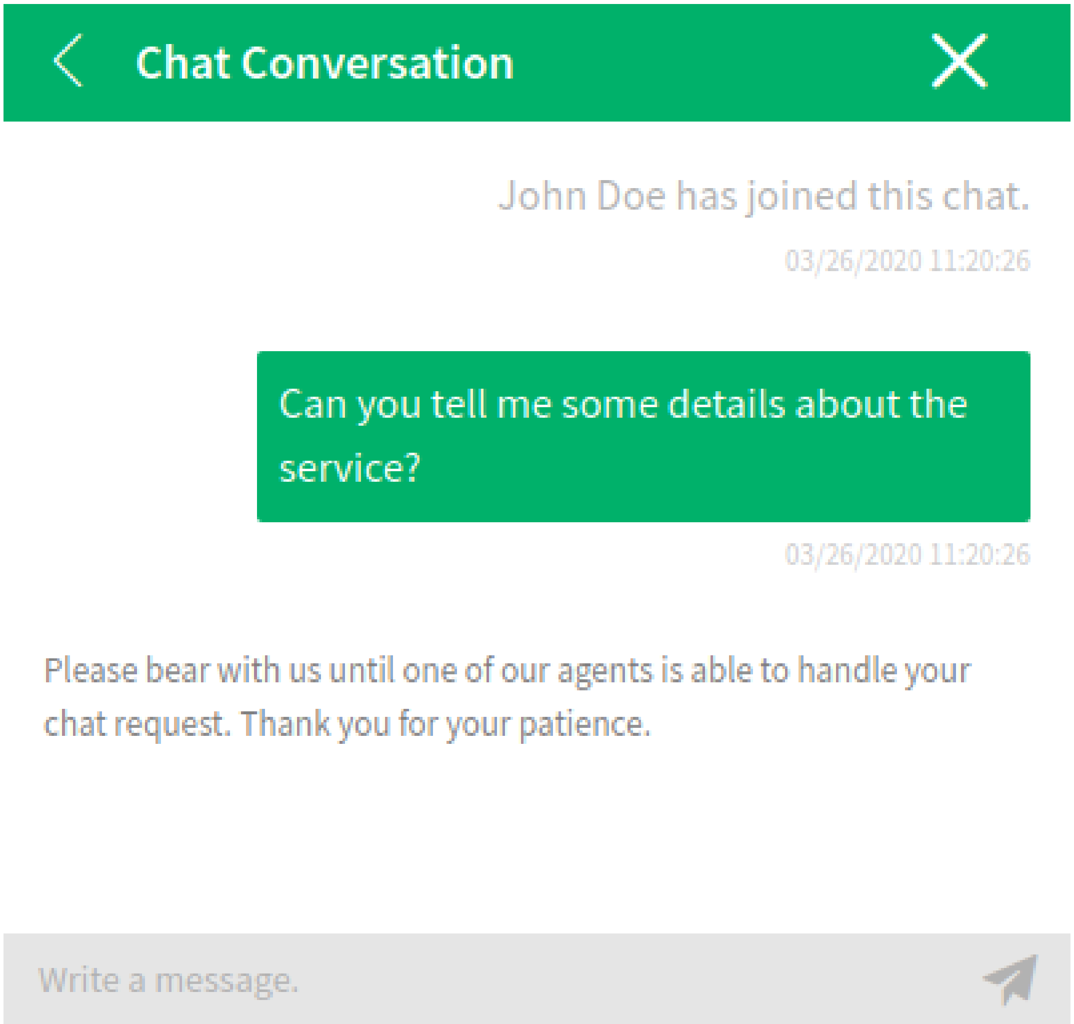
John Smith has joined this chat.

03/26/2020 11:02:00

Good Morning, how can I help you?

03/26/2020 11:02:25

Fig. 2: Customer User Chat



John Doe has joined this chat.

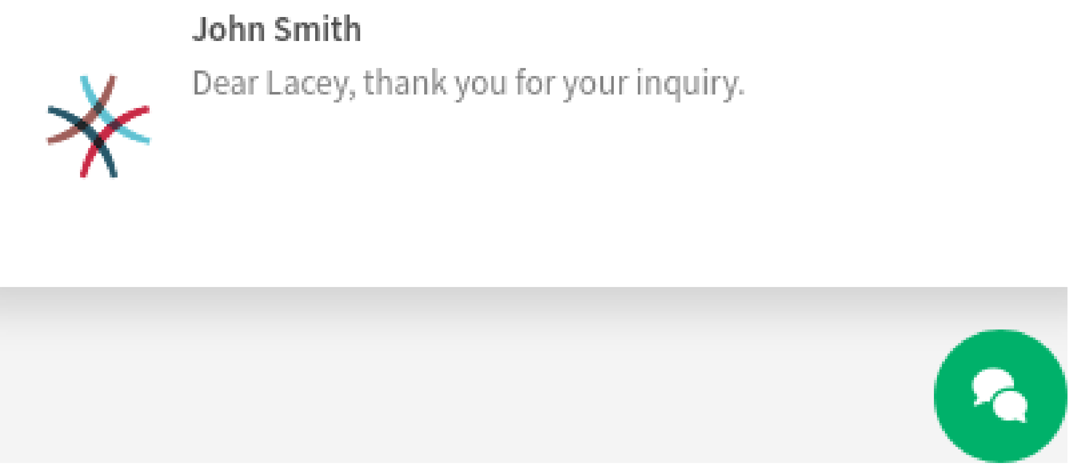
03/26/2020 11:20:26

Can you tell me some details about the service?

03/26/2020 11:20:26

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

Fig. 3: Start Chat Window

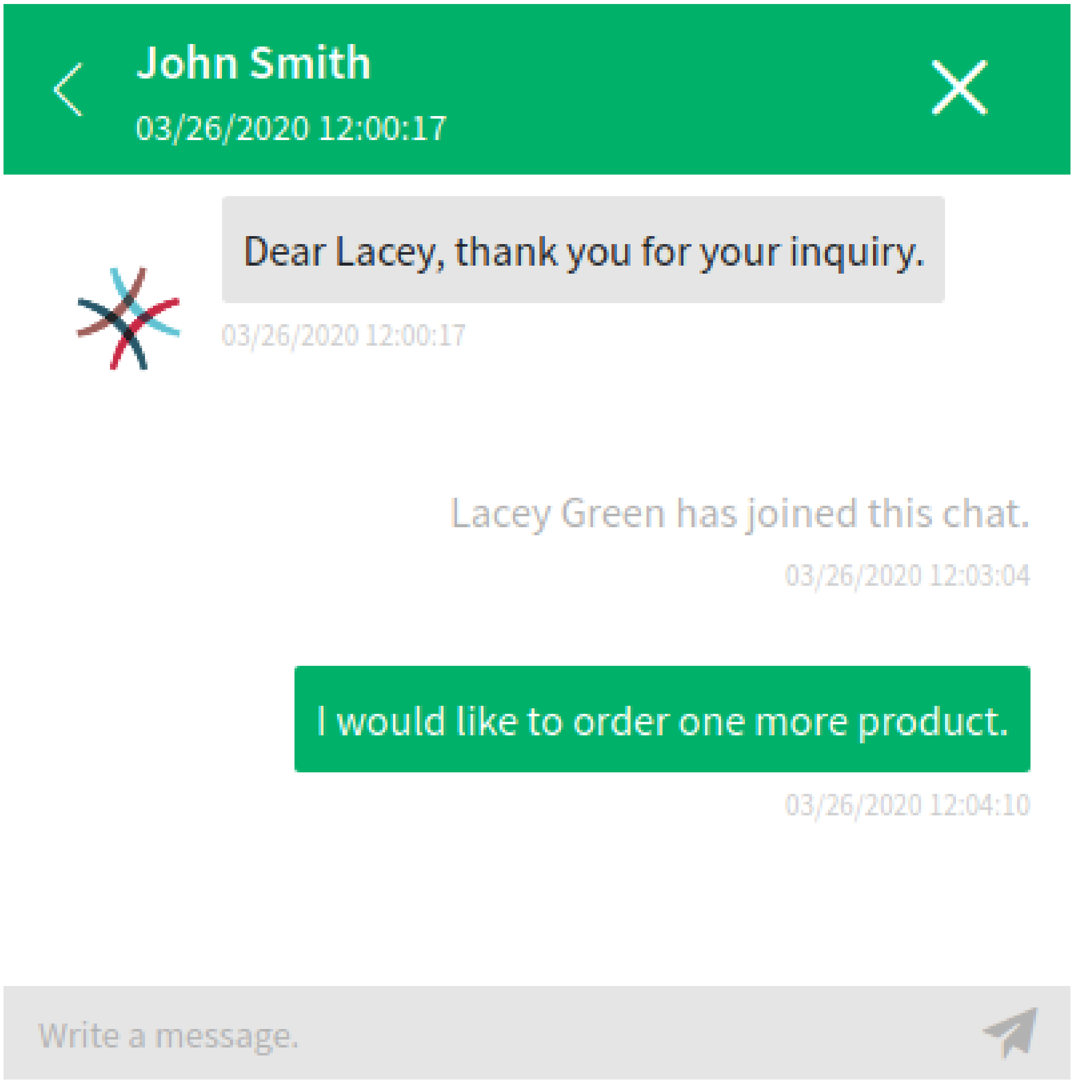


**John Smith**

Dear Lacey, thank you for your inquiry.

Fig. 4: Chat Request on External Interface

3. When you accept the chat request, you can chat now.



John Smith

03/26/2020 12:00:17

Dear Lacey, thank you for your inquiry.

03/26/2020 12:00:17

Lacey Green has joined this chat.

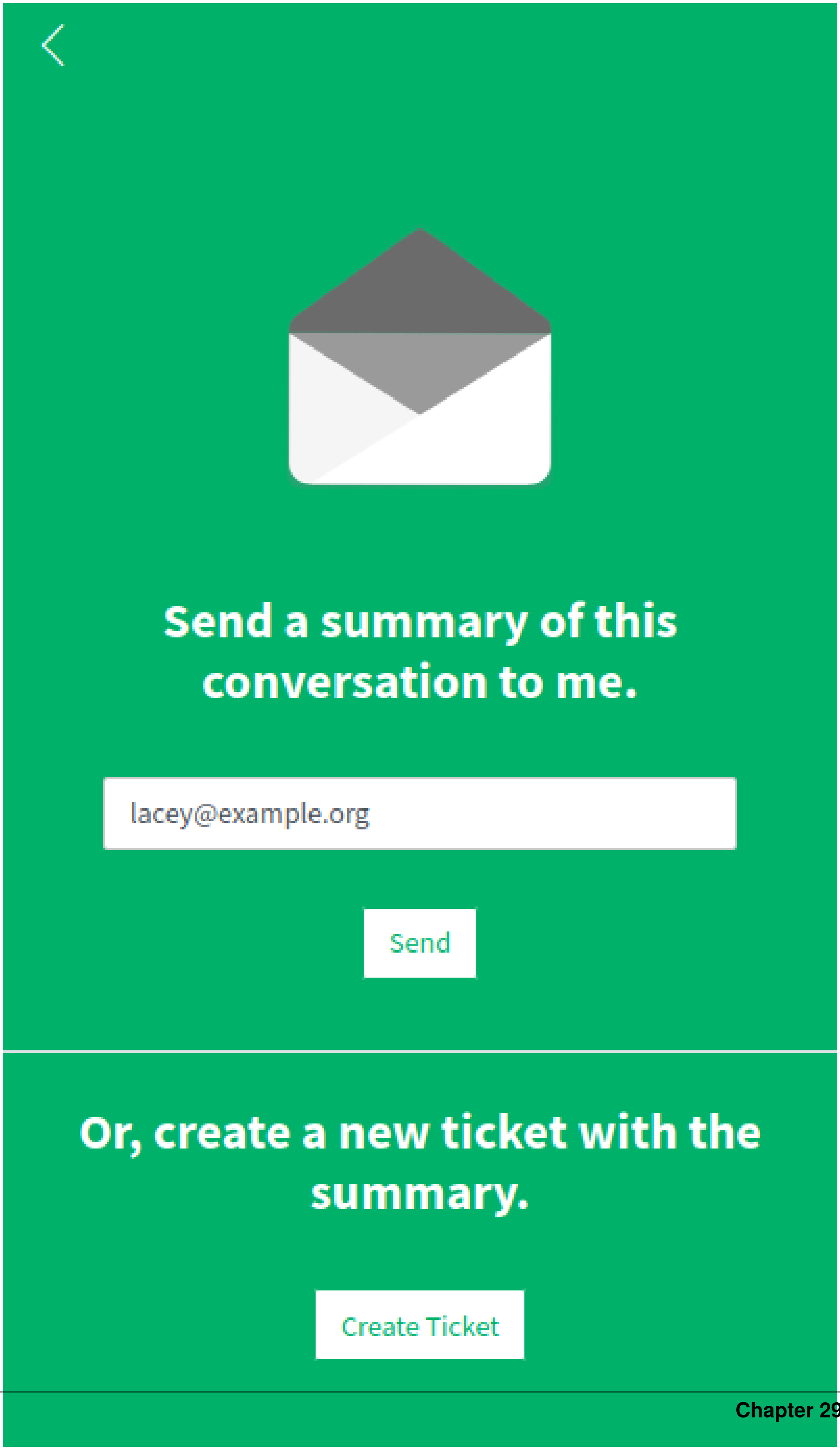
03/26/2020 12:03:04

I would like to order one more product.

03/26/2020 12:04:10

Fig. 5: Agent to Customer User Chat

4. When you close the chat, it is possible to send the chat via email or to create a ticket from the conversation.



Send a summary of this conversation to me.

lacey@example.org

Or, create a new ticket with the summary.

Fig. 6: Save the Conversation on External Interface