OTRS User Manual

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OTRS AG

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AGENT INTERFACE

1.1 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.

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

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.

1.1.1 Email Authentication

Selecting the *Send signed and/or encrypted email if possible* 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.
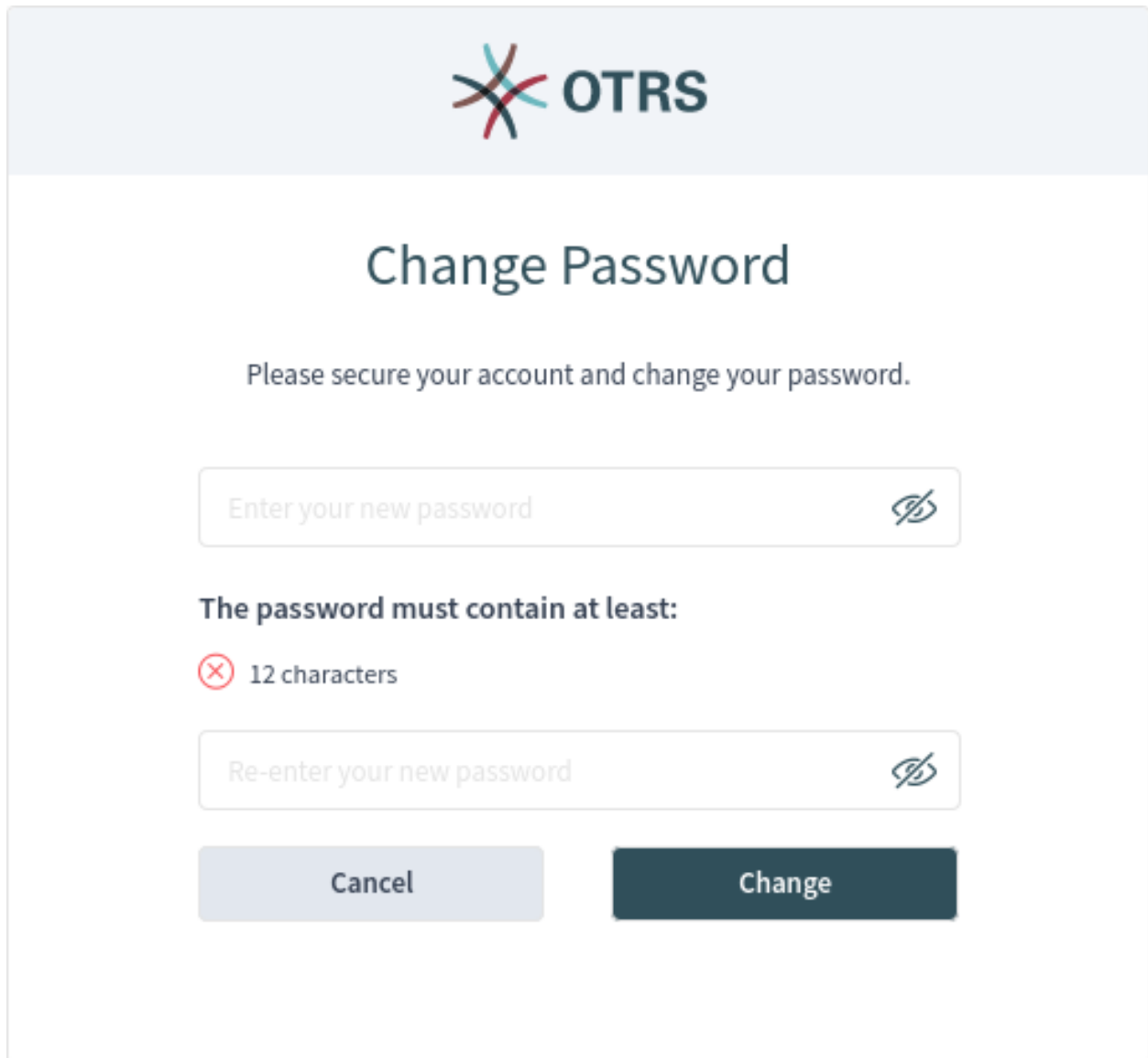
Fig. 1: Agent Login Screen
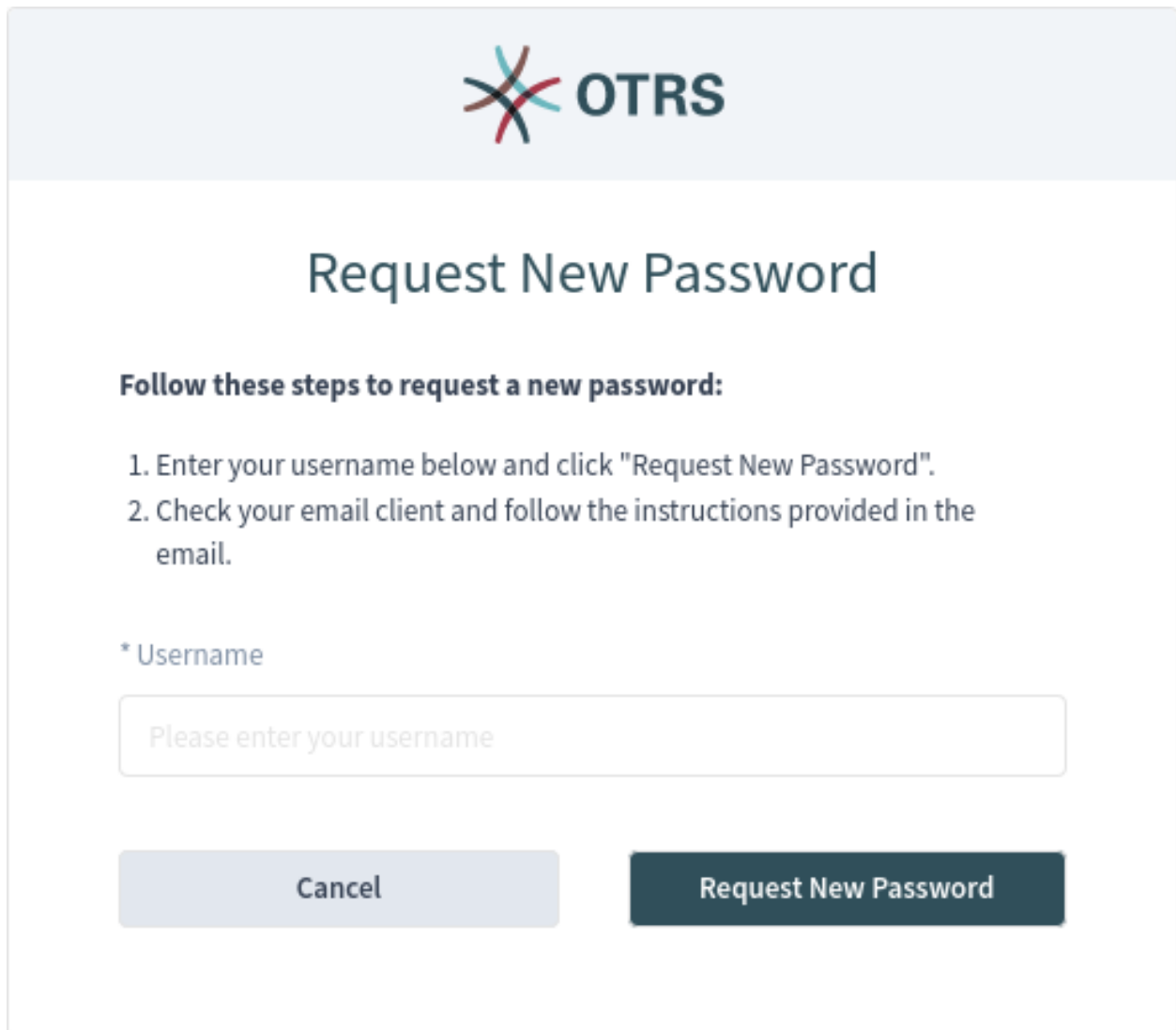
Fig. 2: Change Initial Password

Fig. 3: Request New Password Screen

Fig. 4: Two-factor Authentication
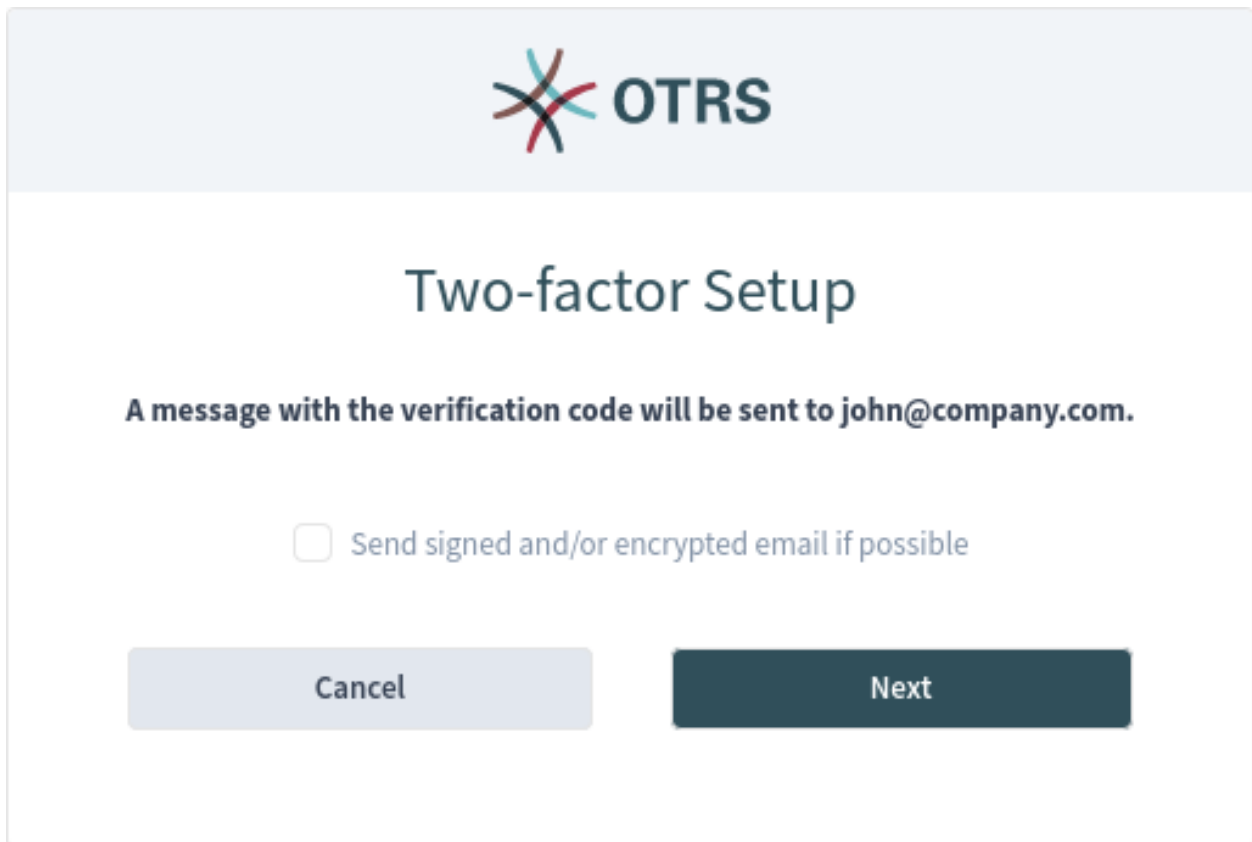
Fig. 5: Two-factor Setup for Email
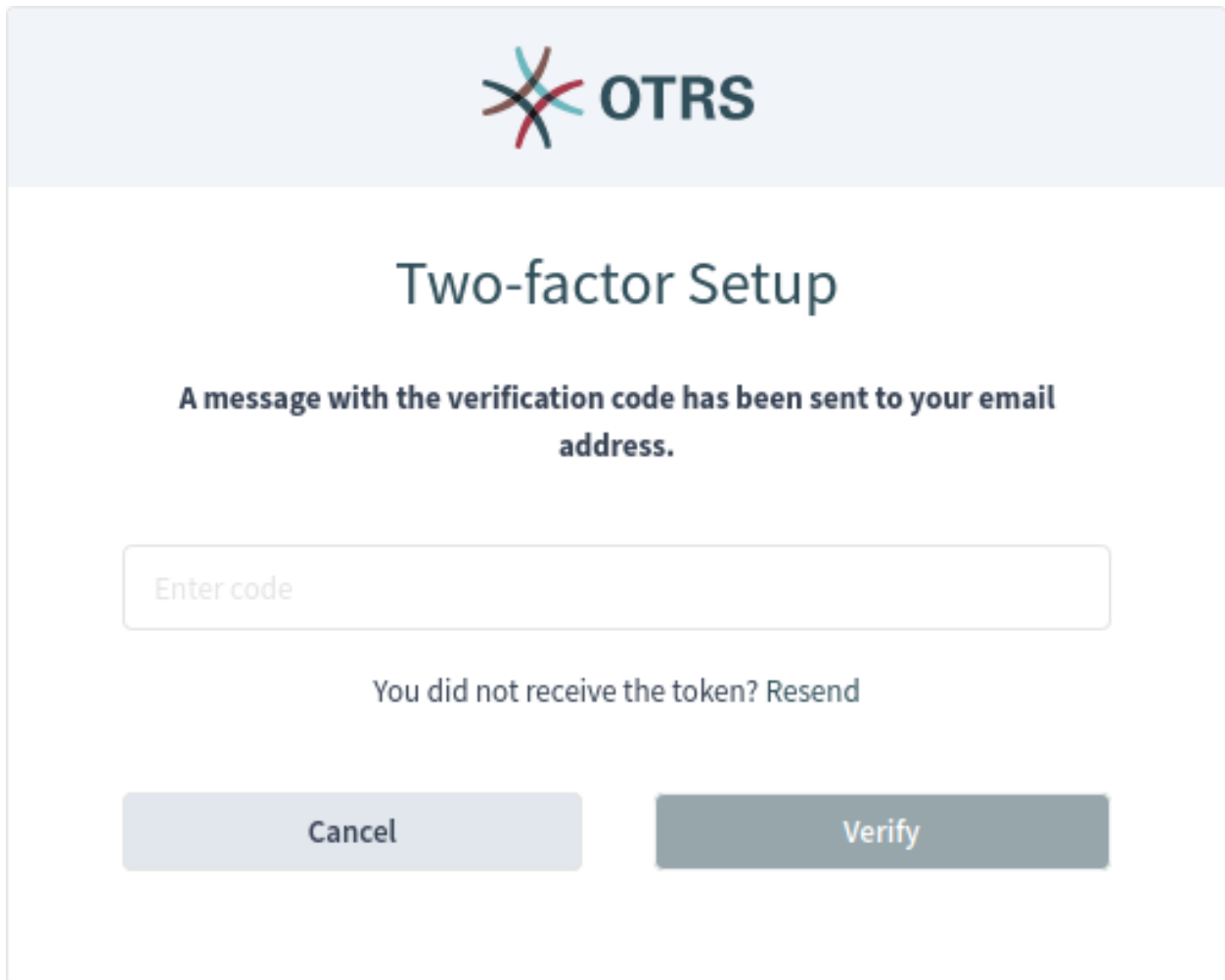
Fig. 6: Two-factor Setup Email Verification

1.1.2 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.

1.1.3 First Login

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

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

1.2 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.

1.2.1 Navigation Elements

On the left side of the screen, there is a sidebar called the *organizer*. The organizer contains the personal settings of the current agent and shortcuts to business object lists. There is a small arrow icon to expand the organizer. The expanded organizer shows the organizer item names next to the icons. The organizer items can be customized in the *Personalization* menu.

The organizer is hidden by default when using **OTRS** on 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.

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.
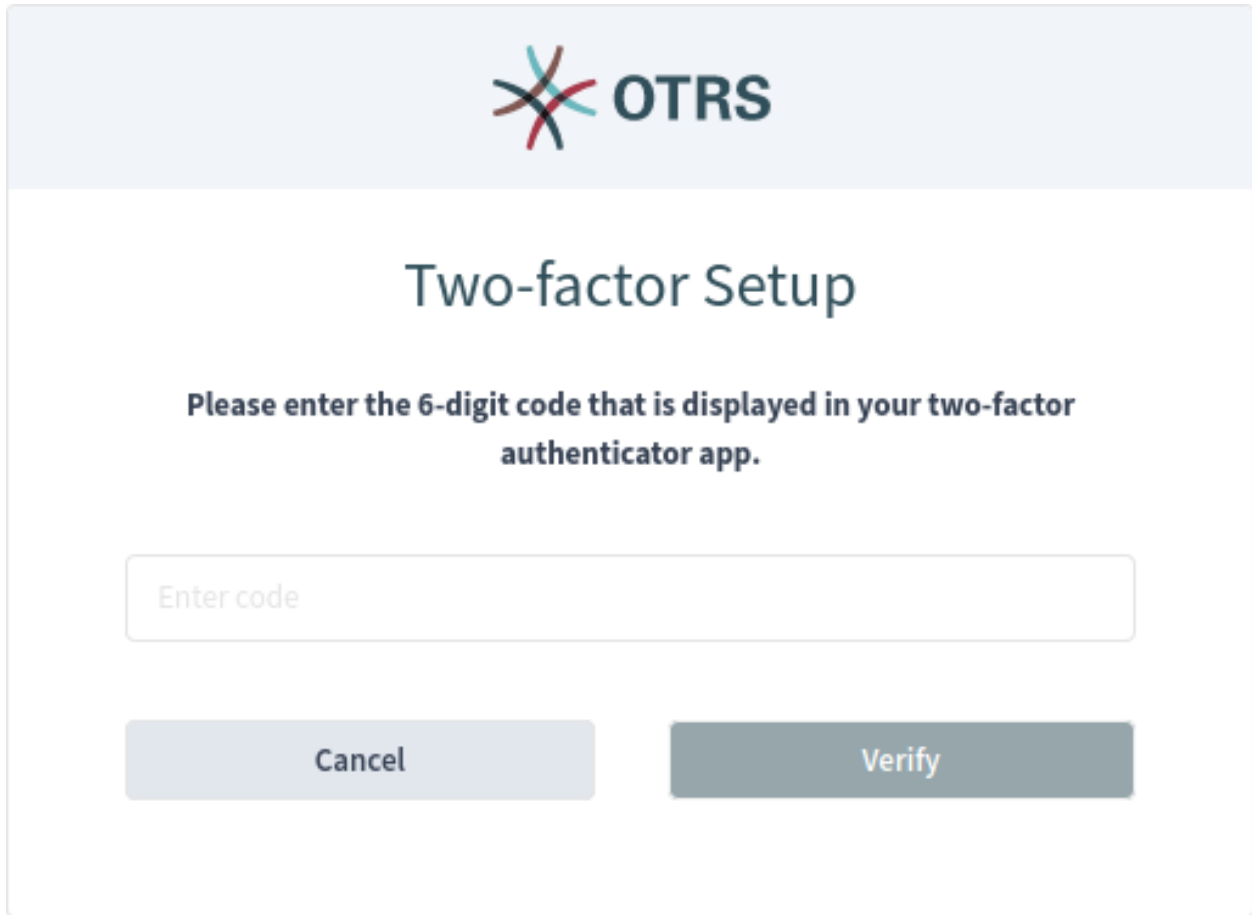
Fig. 7: Two-factor Setup for Authenticator App

Fig. 8: Two-factor Setup Authenticator App Verification
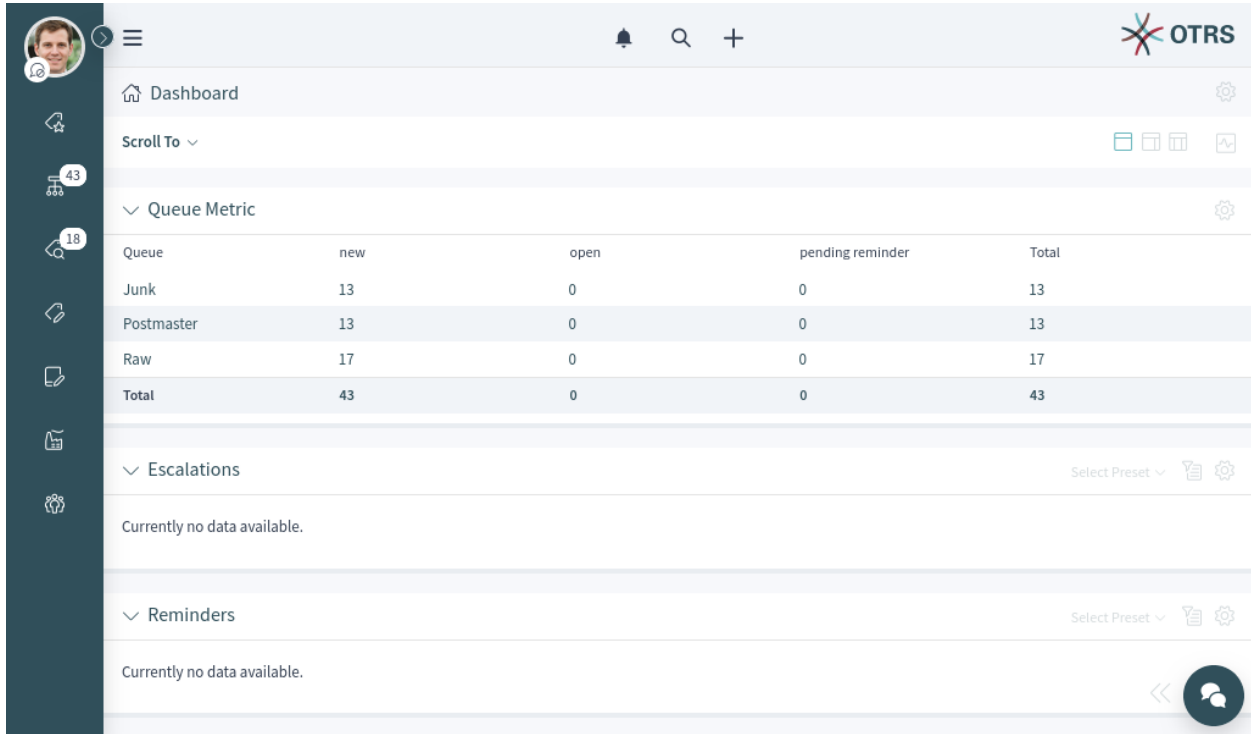
Fig. 9: Personal Dashboard
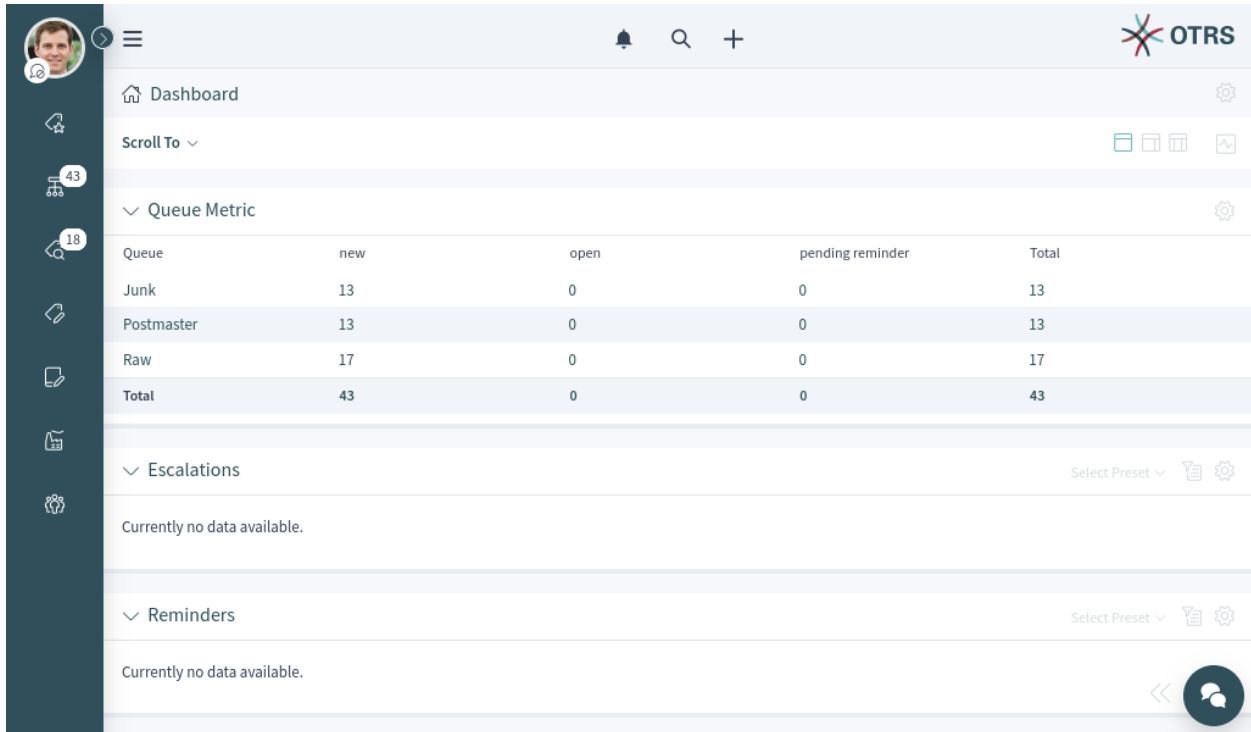
Fig. 10: Personal Dashboard
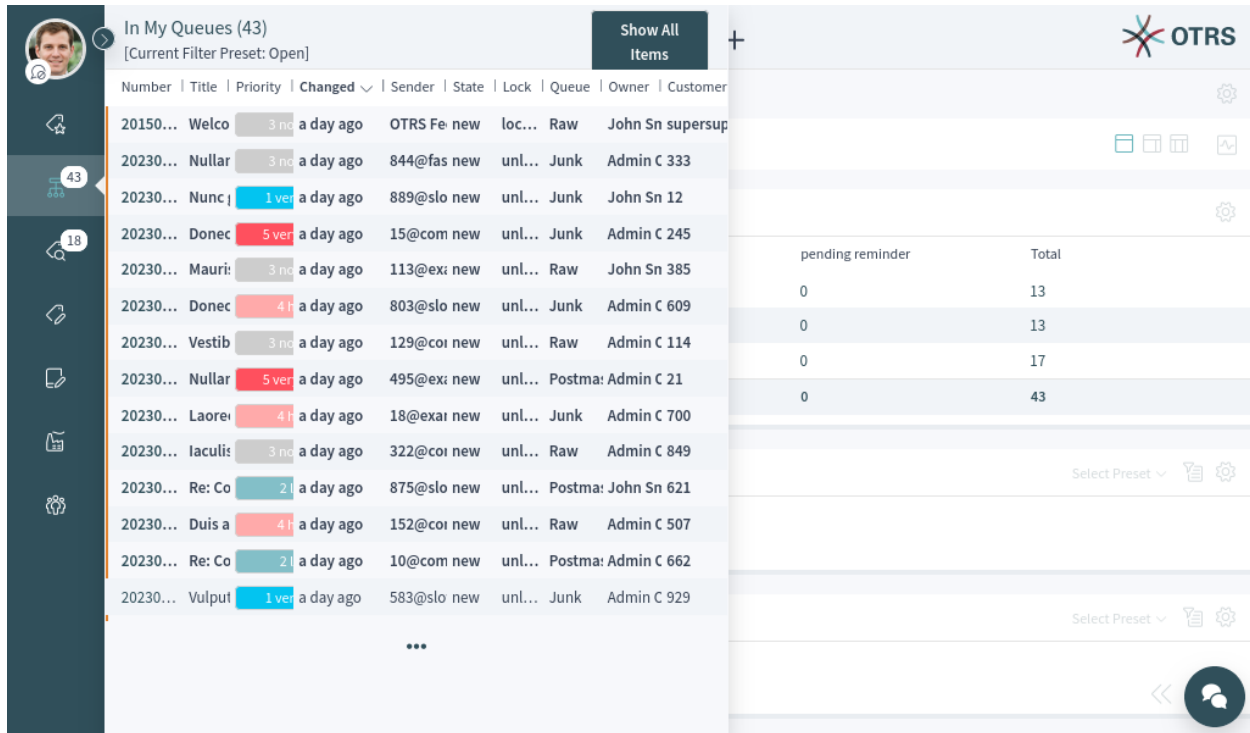
Fig. 11: Business Object List Preview
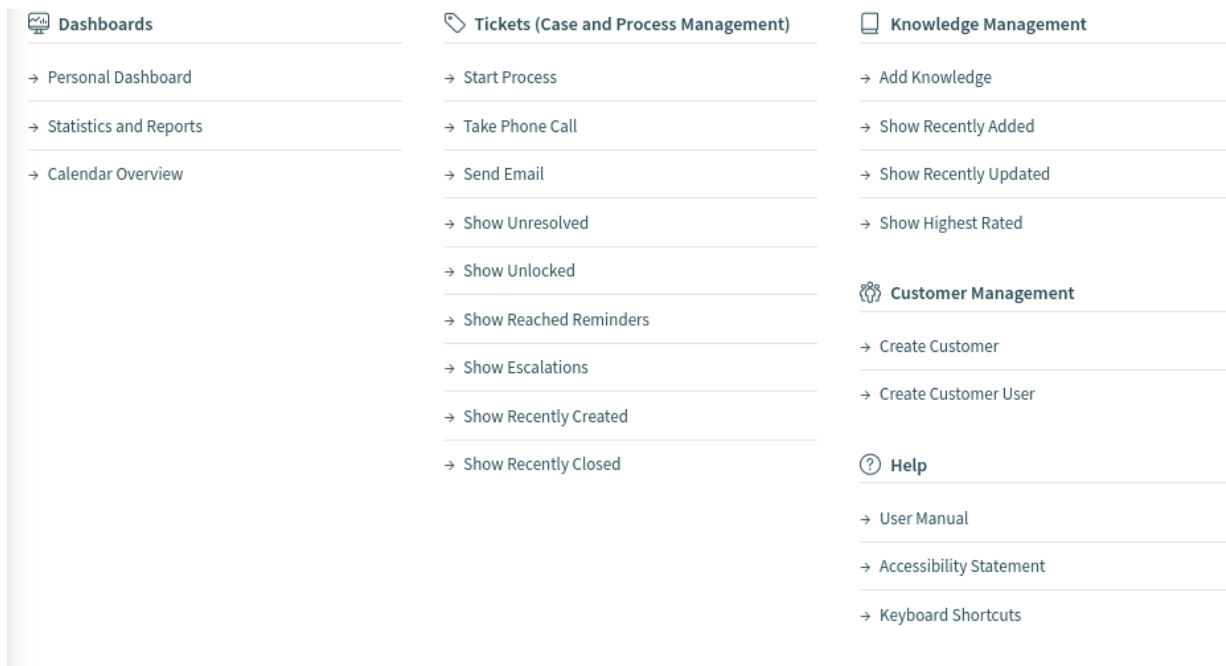
Fig. 12: Main Menu

Fig. 13: Header Toolbar

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.
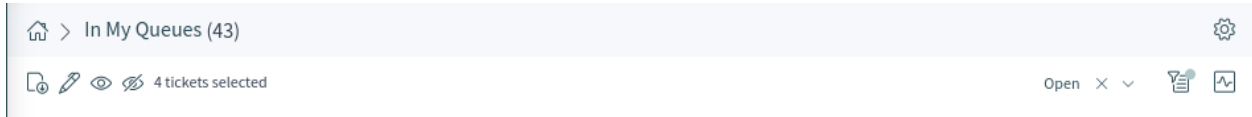
Fig. 14: Breadcrumb Bar For Business Object List
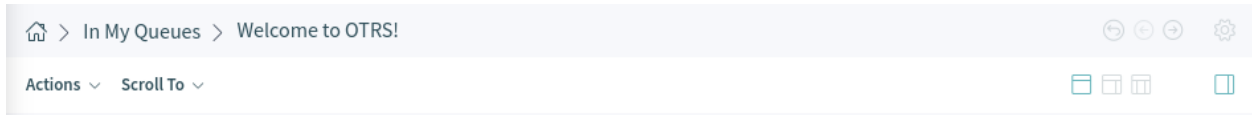
Fig. 15: Breadcrumb Bar For Business Object Detail View

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 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 toggled from 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*.

Fig. 16: Screen Configuration For Two-column Layout

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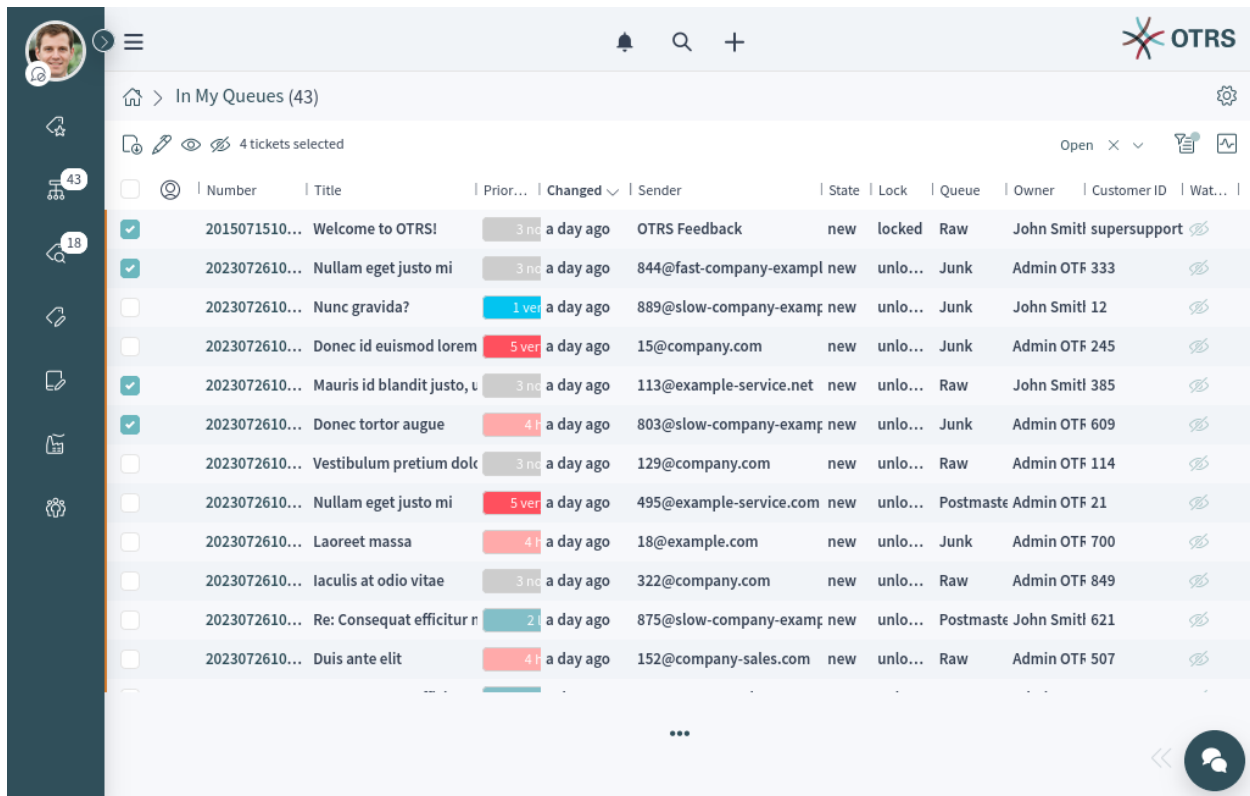
All components in **OTRS** are called business objects. Business objects can be:

- Appointments
- Configuration items
- *Customers*
- *Customer Users*
- *Knowledge Base Articles*
- Service level agreements
- Services
- *Statistics and Reports*
- *Tickets*
- Other similar objects

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

1.2.3 Business Object Lists

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

Fig. 17: 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 currently displayed list are not shown immediately. A notification on 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 can be sorted and resized. Clicking on any column that is visible and can be sorted replaces the current sorting criteria and re-sorts the data based on the column's data. A sorted column is indicated by bold text and a small arrow in the column heading. You can resize any column with the handle in the right side of the header.

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.

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.

Fig. 18: Business Object List Export
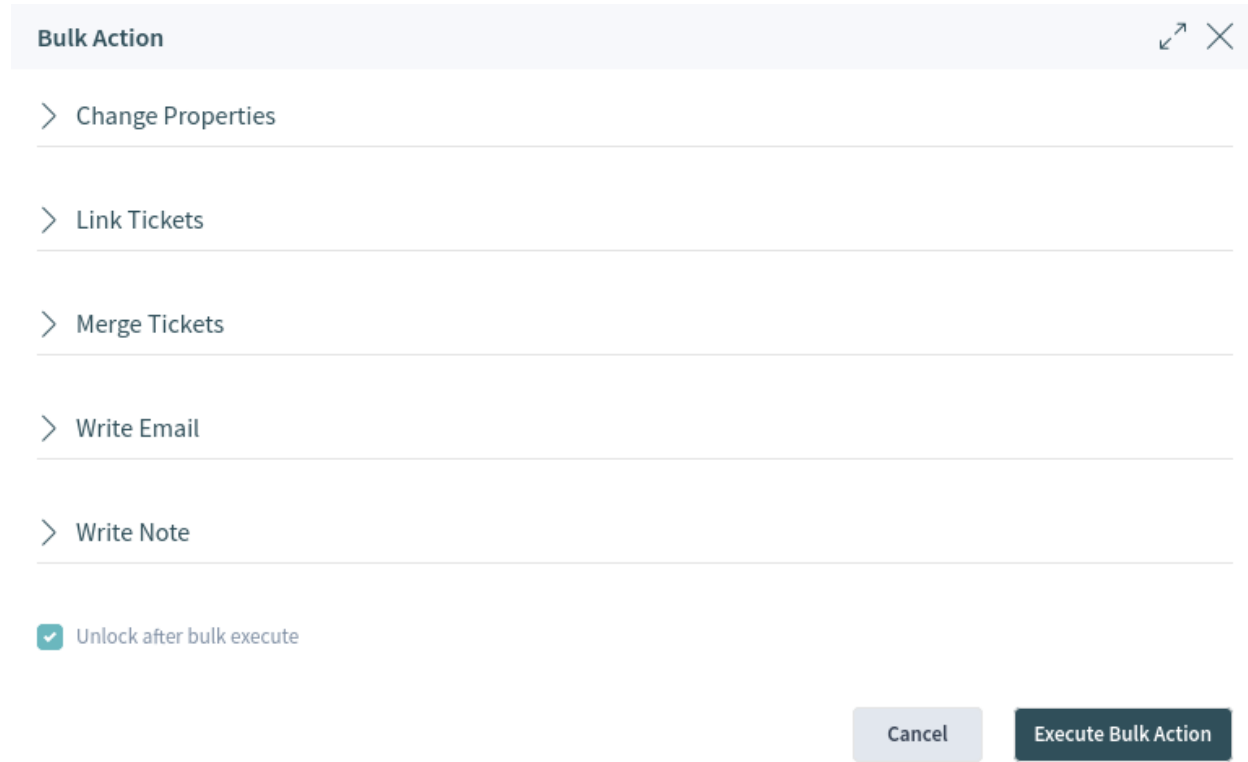
Fig. 19: Business Object List Bulk Action
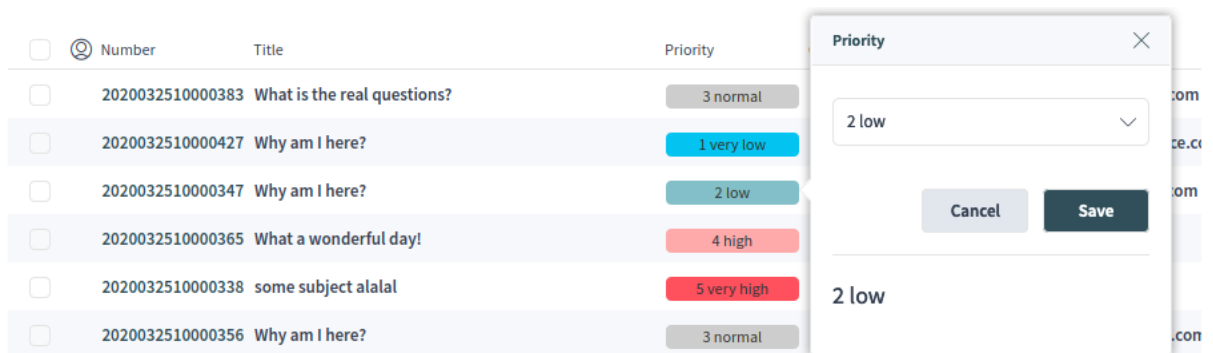
Fig. 20: Business Object List Inline Edit

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

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.

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.

The filter section will be opened on the right side of the screen next to the business object list.

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.

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.

1.2.4 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.

Fig. 21: Business Object List Screen Configuration
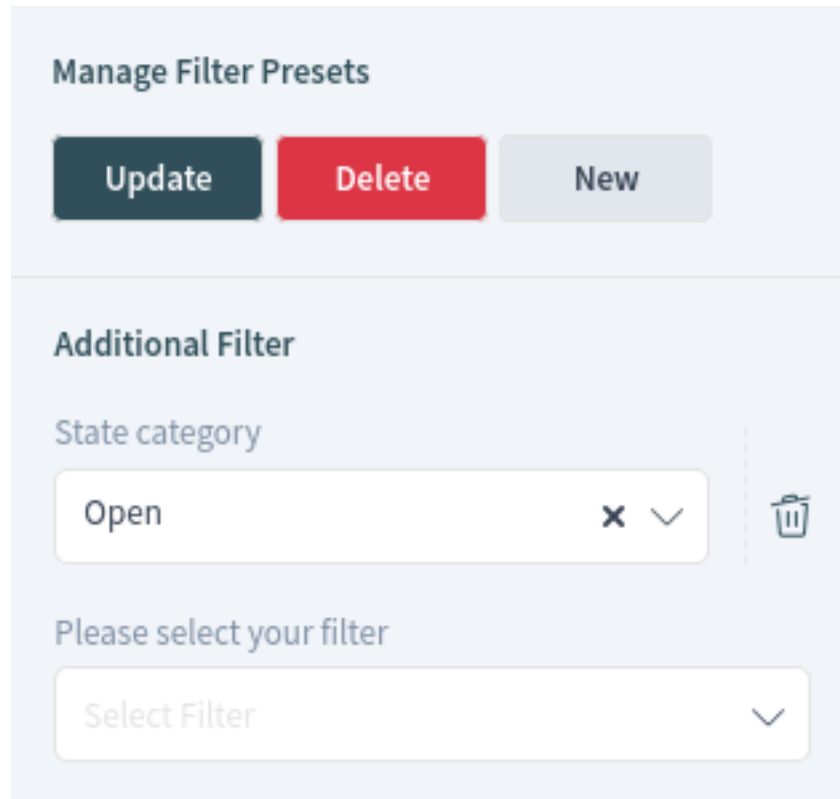
Fig. 22: Business Object List Filter Preset

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.

The content of a widget can be a table, a content area, or can consist of multiple content cards. Tables can be sorted and resized like the business object lists.

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, and they are displayed on the top of each widget. 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.

Fig. 23: Business Object List Filter
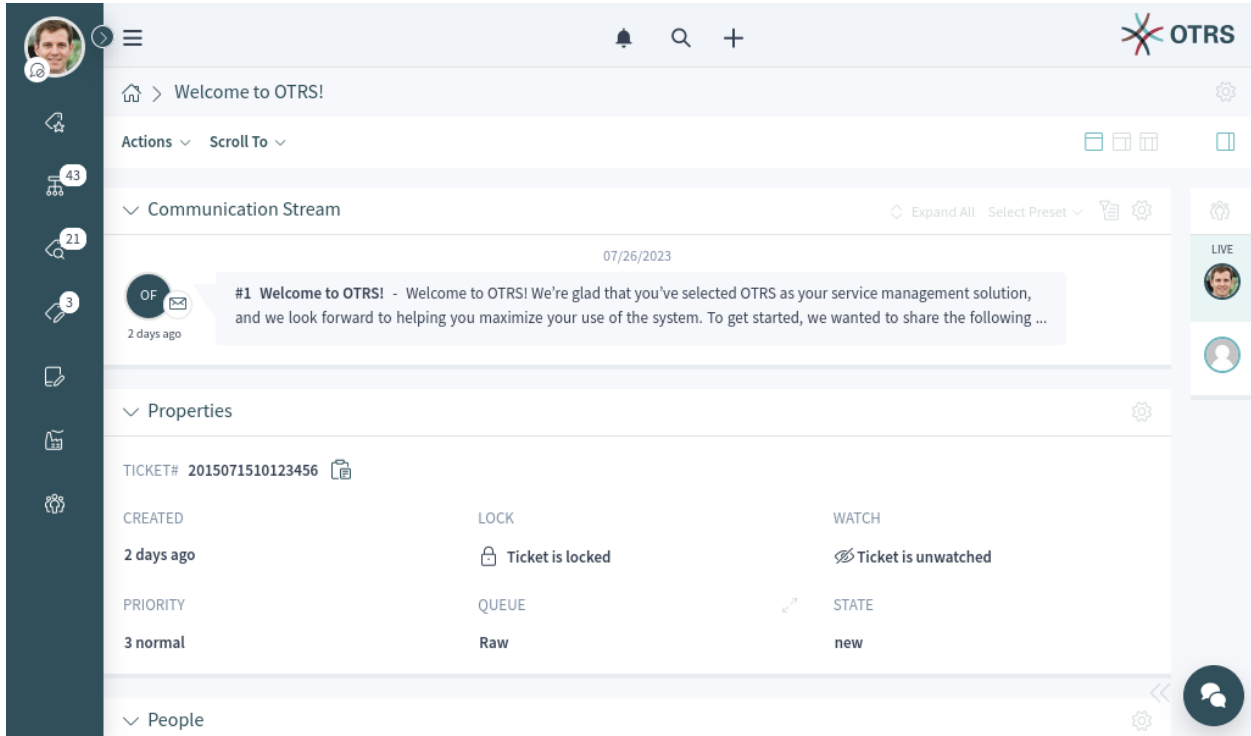
Fig. 24: Business Object Detail View Example
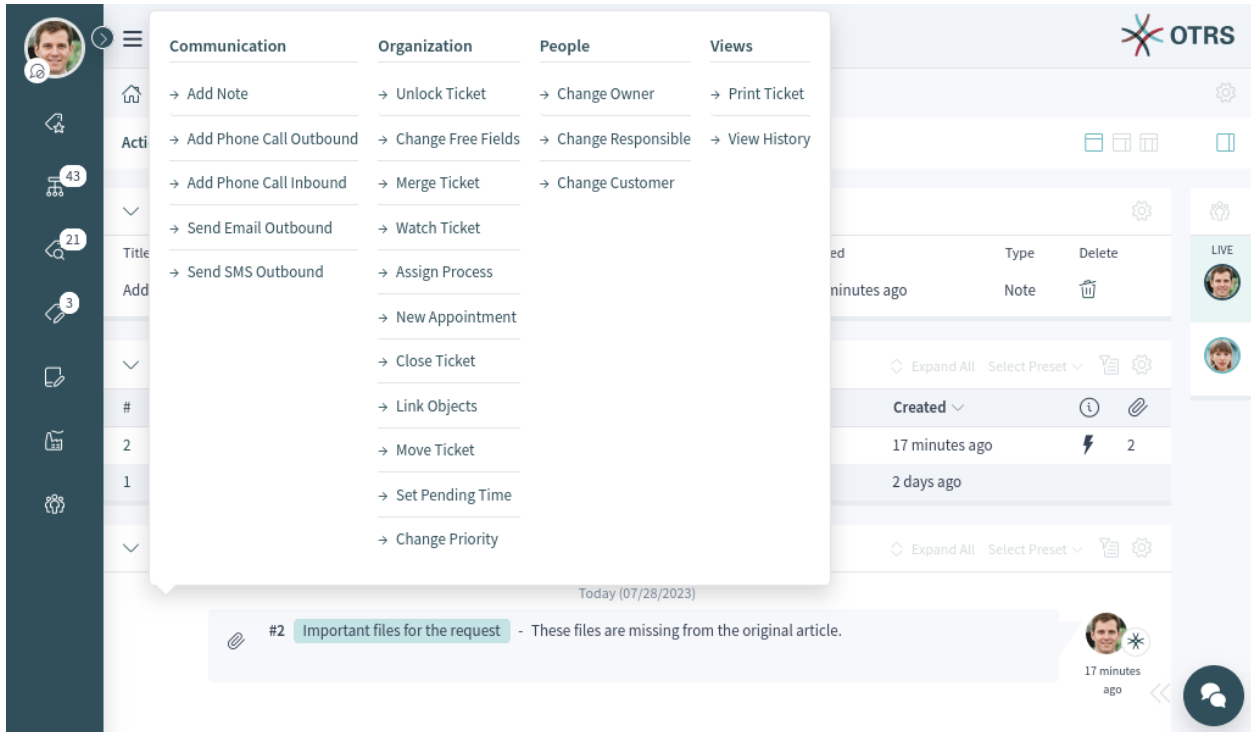
Fig. 25: Business Object Detail View Actions
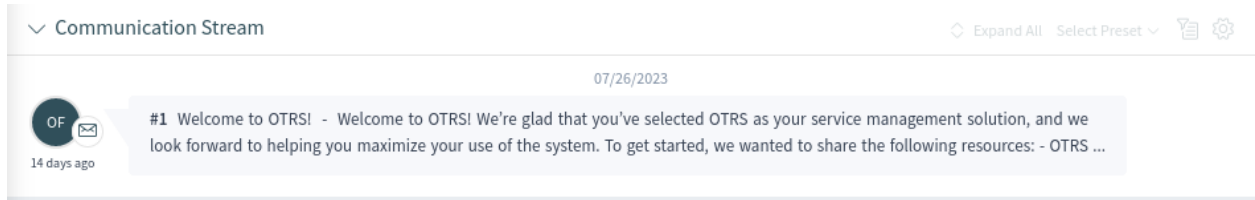
Fig. 26: Widget Overview
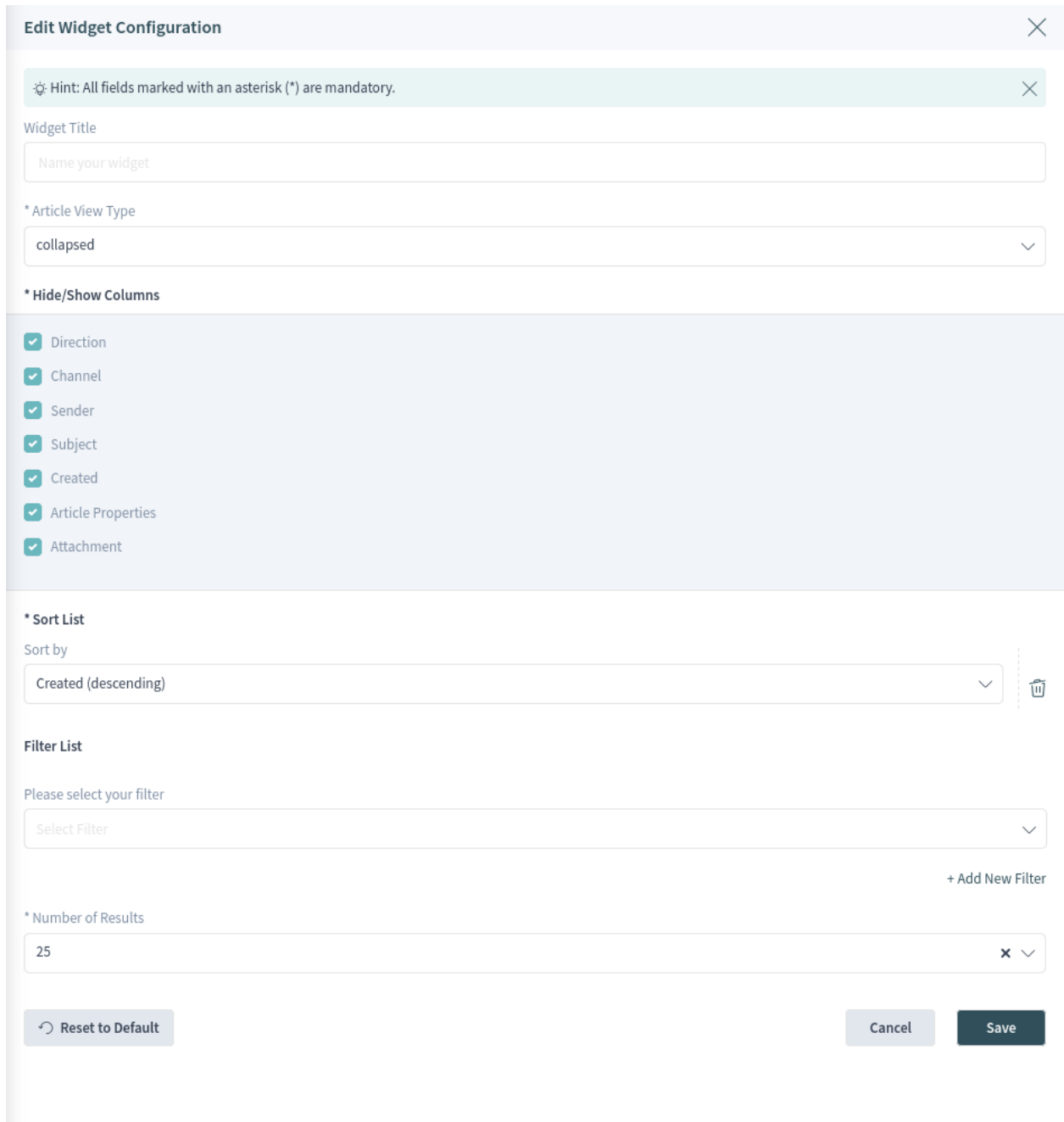
Fig. 27: Widget Configuration

Hide/Show Columns
> In this list, columns which 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.

1.3 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.

1.3.1 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.

Fig. 28: Personalization

See also:

Translation status of incomplete languages is low, but you can help to improve the translation at https://translate.otrs.com/.

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.

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.

1.3.2 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.

1.3.3 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.
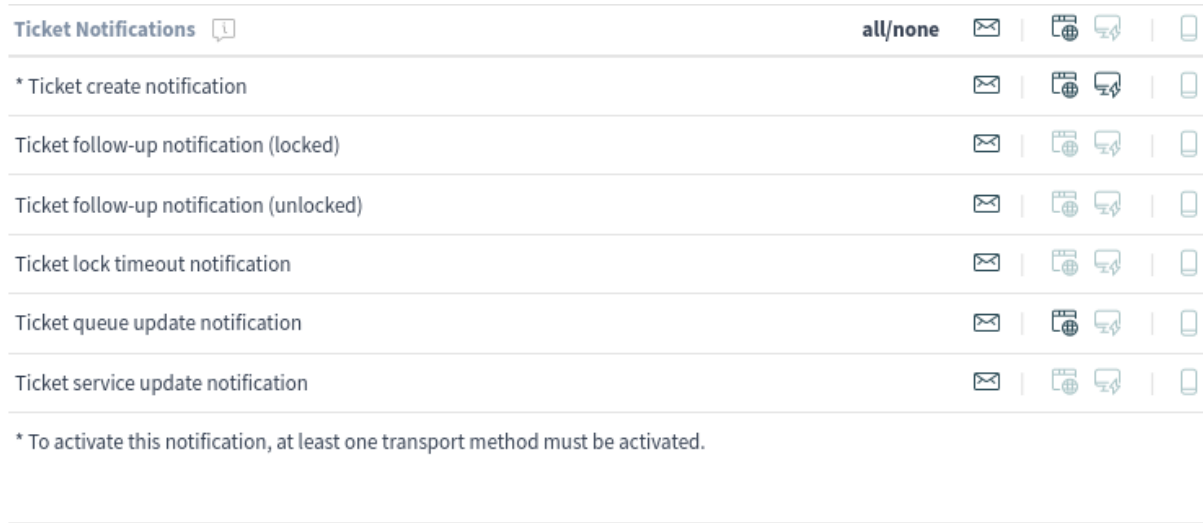
Fig. 29: Ticket Notifications Widget

The possible methods are *Email*, *Web View* with *Browser Notification* support or *SMS*.

The *Browser Notification* can only be selected if the *Web View* is selected, too. *Web View* notifications will be displayed in the *Notifications* area while a *Browser Notification* is a native browser notification which needs to be enabled in the web browser at first time.

Appointment Notifications
　　In this widget, the methods used for any kind of appointment notification can be selected.
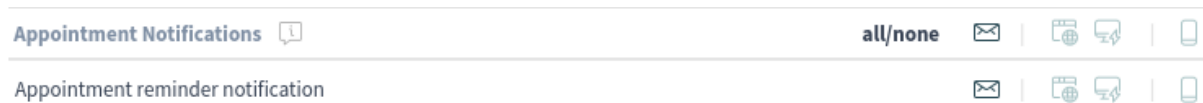
Fig. 30: Appointment Notifications Widget

The possible methods are *Email*, *Web View* with *Browser Notification* support or *SMS*.

The *Browser Notification* can only be selected if the *Web View* is selected, too. *Web View* notifications will be displayed in the *Notifications* area while a *Browser Notification* is a native browser notification which needs to be enabled in the web browser at first time.

1.3.4 Focus Topic Settings

Note: This feature is not enabled by default. It has to be enabled by `AgentPersonalPreference::Groups###0999-FocusTopics` setting of the administrator interface.

This feature supports agents in keeping track of all incidents and requests that relate to a specific focus topic. This is especially helpful when many tickets are handled by different agents at the same time.

With this feature, agents can easily and quickly identify all relevant tickets by defining the ticket properties in their personal settings, that belong to their focus topics. For each selected focus topic, agents can receive notifications, for example, when tickets are created or SLA times are reached. The available options for defining focus topics are not limited to services but include all ticket properties as well as dynamic fields. The ticket properties for the focus topic settings in the agent preferences are enabled/disabled in the system configuration.

This feature allows agents to set various ticket attributes as focus topics. Each agent can focus on multiple ticket attributes and each ticket attribute can be focused on by multiple agents. Some new filter options are available for ticket lists to filter for focus topics.

These settings are for customizing personal notifications. In this screen the agents can set various ticket attributes to focus on those tickets.

Fig. 31: Focus Topic Settings

Select one or more ticket attributes from the drop-down lists.

Note: Ticket notifications have to be also configured by the system administrator in order to receive the notifications.

1.3.5 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:

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 Default* button, it is possible to reset the organizer to the default state.

By using the *Organizer Hover* switch, the agent can activate and deactivate the generated sub menu which appears when they hover the mouse over an organizer item. If there is no such switch, this feature is deactivated to all agents.

1.3.6 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.
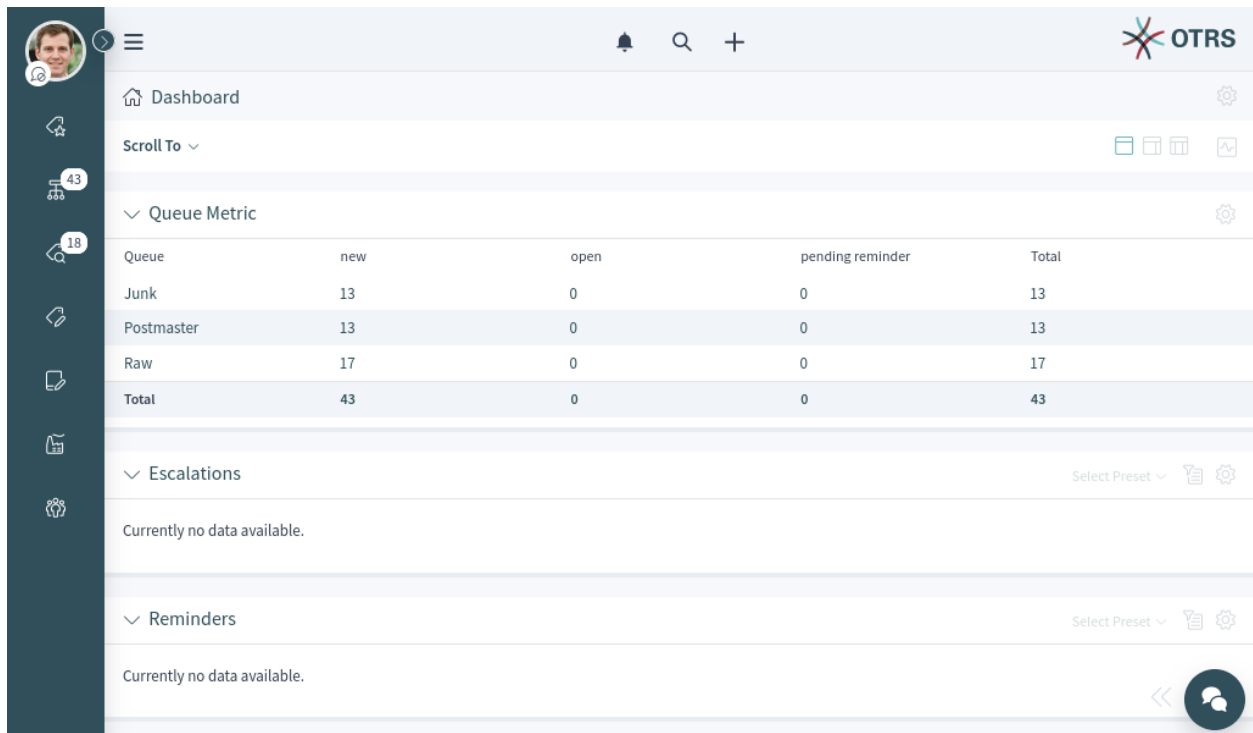
Internal & external
> Available for agent-to-agent, agent-to-customer, customer-to-agent, and public-to-agent chats.

1.3.7 Logout

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

1.4 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.

Fig. 32: 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.

1.4.1 Announcements Widget

Internal news or information can be added via the administrator interface to appear with the corresponding *Announcements* widget in the agent interface. A click opens the detailed view of the respective news item, containing the title, content, creation date and change date. The widget can be individually activated or deactivated as an optional widget in the agent dashboard. The *Announcements* widget makes it easier to inform employees about events, innovations and offers.
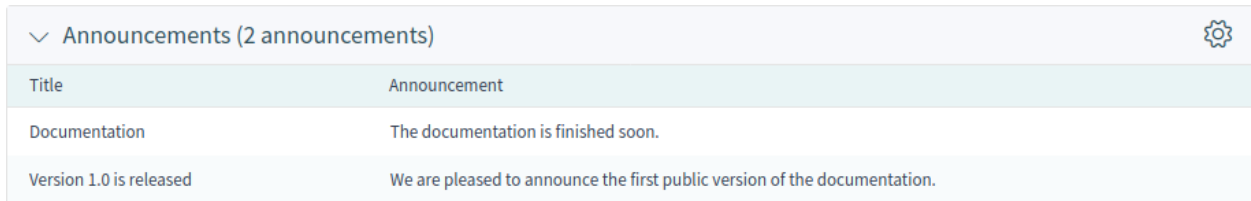
Fig. 33: Announcements Widget

Clicking on an entry in the widget will expand the announcement to see the details.
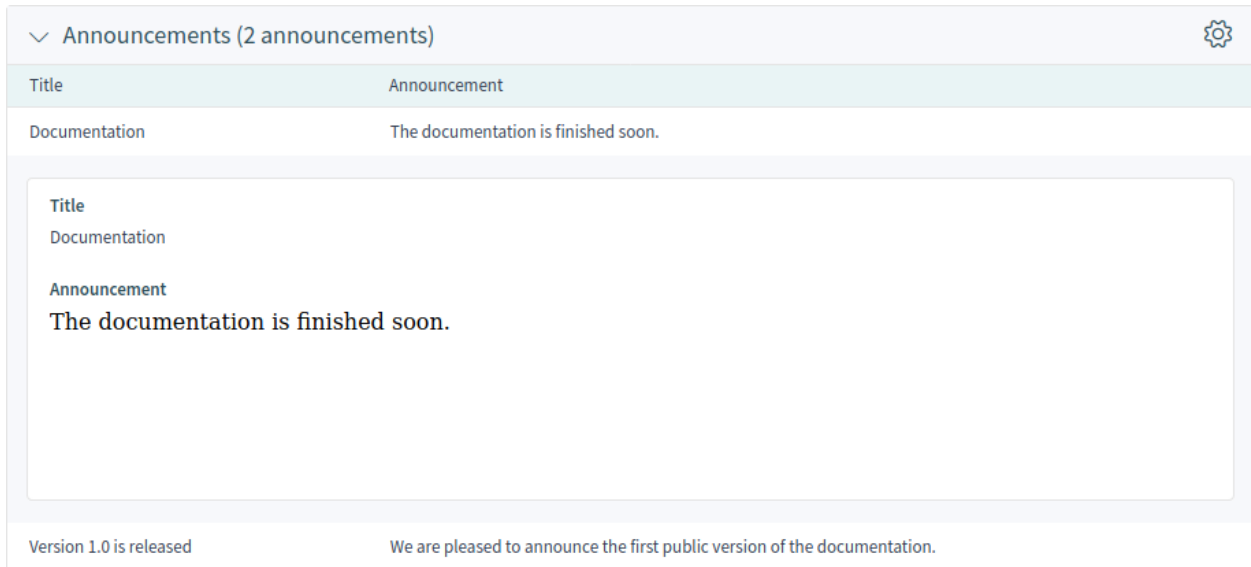
Fig. 34: Announcement Details

1.4.2 Customer Activity Widget

This dashboard widget allows agents to define a set of customers to automatically query. It displays a table showing the related number of open, locked and escalated tickets. Drill down to specific tickets by simply clicking on one of the numbers shown per customer.

Every agent can choose the customers he wants to see. The widget is empty by default, since no customer has been selected yet.
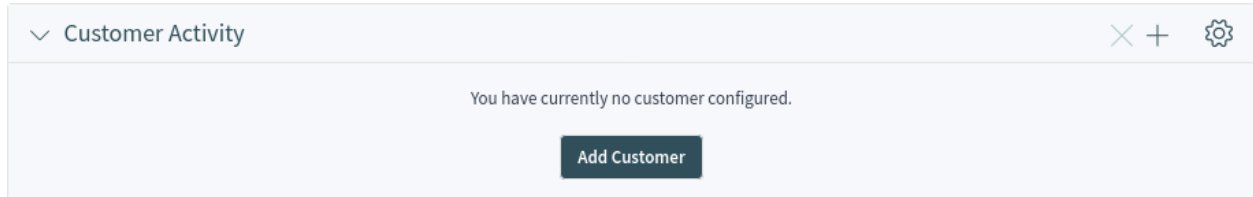
Fig. 35: Customer Activity Widget Without Selected Customer

Clicking on the *Add Customer* button opens an action where you can filter for one or more desired customers and select them via a checkbox. Submitting the form will populate the widget with the customers.

Note: If an agent is already using the widget in OTRS 7, the settings and the content will be fully migrated from the previous version.

Fig. 36: Customer Activity Widget

For the selected customers the number of open/unlocked, open/locked and escalated tickets will be shown.

The tickets are summed per row and per column. Clicking on the customer itself leads to the customer detail view. Clicking on one of the number in each row leads to a separate ticket list, where exactly these tickets are displayed. If you hover over the numbers in the matrix instead, a popover card with exactly the same list of tickets will be displayed, so you can have a quick look at the tickets behind the numbers. This does not apply to the assigned numbers in the *Total* row at the footer of the widget.

To turn on and off the widget:

1. Open the screen configuration of the *Dashboard*.
2. Add or remove the *Customer Activity* widget. You can rearrange the widgets as well.
3. Click on the *Save* button.

To add customers to the widget:

1. Click on the plus button in the header of the widget.
2. Select the customers that you want to display in the widget.
3. Click on the *Add Selected* button.

To remove a customer from the widget:

1. Click on the × button in the last column.
2. Click on the *Yes* button in the confirmation dialog.

The behavior of the ticket count feature can be changed in the widget configuration.

Fig. 37: Customer Activity Widget Configuration

Count Tickets *
    If you select *All tickets*, every ticket will be counted, even those tickets for which the agent does not have the sufficient rights. Selecting the *Permitted tickets* option will count only the tickets for which the agent has proper permissions.

Ticket Permissions *
    Controls if *read only* or *read-write* permission is needed to count the tickets.

1.5 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.

1.5.1 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. If an article is configured in the process configuration to use *Email* communication channel, an email will be sent to the customer user.

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.

Properties Widget

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

Classification
> In this section, the ticket type can be selected.
>
> **Type** *
> > Select a type for the ticket.

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.

> ---
> **Note:** The access to the address book could be restricted to certain user groups. In this case the icon is not visible. Please contact your administrator to get access.
> ---

> **Customer User** *
> > The person for whom the ticket is created.
>
> **Customer ID**
> > This field will be auto-populated by selecting a customer user.

Fig. 38: Select 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. 39: Queue And Owner Selection

Queue *

The queue into which the new ticket will be placed.

After selecting a service, there is a lookup for configured queues for this service. If there are configured queues for the selected service, only those will be available in the queue selection. If there are no queues configured for the selected service, all queues will be displayed.

It is possible to add a filter button next to the queue selection. After clicking this button all available queues get restored to the queue selection field and can be selected. This feature can be enabled in the system configuration.

Configured ACLs affect the displayed queues as usual.

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: This 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 service, SLA, priority and the next ticket state can be selected.

Service

Select a service for the ticket.

SLA

Select an SLA for the ticket.

Fig. 40: Priority And State Selection

Impact
Select the impact level from *1 very low* to *5 very high*.

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

The priority of the ticket is automatically calculated from the selected service and impact based on the criticality impact priority matrix. However, the priority can be overridden and changed manually.

Due Date
Select a date as due date for the ticket.

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

Note: *Customer Users Services* filter is applied before the one for *Types Services*.

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.

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 of the email, if needed. This field is displayed only for email tickets.

Bcc
Select other customer users as blind carbon copy of the email, if needed. This field is displayed

---

Fig. 41: Write The Message

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.

Relevant Knowledge

This field is not visible by default, but it displays related *Knowledge Base Articles* based on the keywords entered in the *Subject* and/or the *Body* fields. Clicking on a knowledge base article opens the knowledge base article detail view.

The related knowledge base articles are displayed as the agent types, so the list of suggested knowledge base articles is updated after any word typed into the *Subject* and/or the *Body* fields. The suggested knowledge base articles are sorted based on the number of matched keywords.

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.

Dynamic Fields

The dynamic field of type attachment is displayed in the ticket detail view, if it is added to the screens and at least one file has been uploaded.

To upload files to dynamic field of type attachment:

1. Make sure that the dynamic field of type attachment is added to the desired screen.

2. Click on the uploading area or just dropping the files there. The file gets uploaded immediately to the server and a new upload field will be displayed as long as the configured maximum amount of attachments has not been reached.

3. Click on the *Send* button. If a file has exceeded the maximum attachment size, a message will appear warning the agent that the file exceeds the maximum attachment size. In this case the file will not be uploaded and the ticket will be created without problem.

The dynamic field of type attachment is displayed in the ticket detail view or in the header of the article, if it is added to the screens and at least one file has been uploaded.

To download a file from a ticket dynamic field of type attachment:

1. Find the dynamic field in the *Properties* widget of the ticket detail view.

2. Click on the download icon next to the filename to download the file.

The widget can be expanded to look similar to the *Attachments* widget.

If an image file is uploaded, it is possible to see a preview of the image.

Dynamic field of type attachment supports searching for the file names. To search for a file name of a dynamic field of type attachment, add the dynamic field to the search engine.
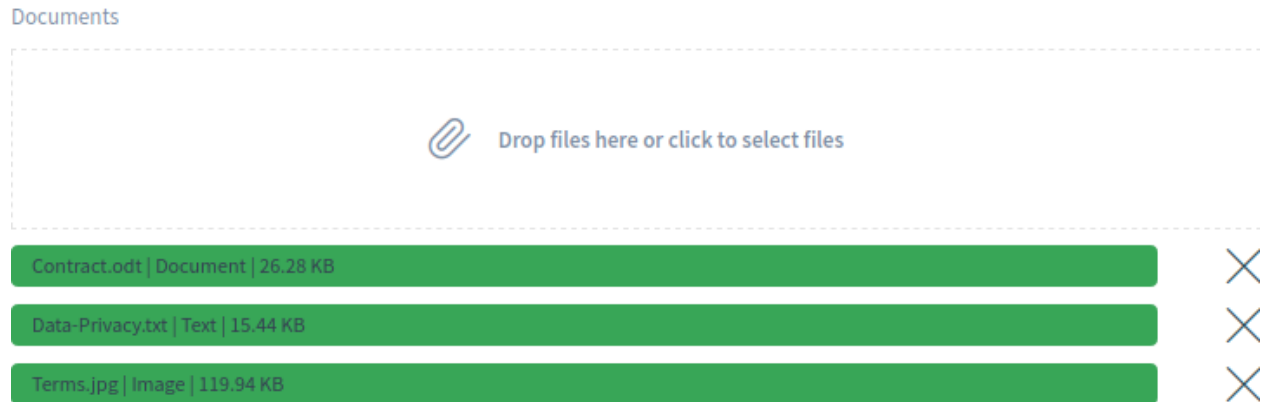
Fig. 42: Dynamic Field Attachment in Action Form
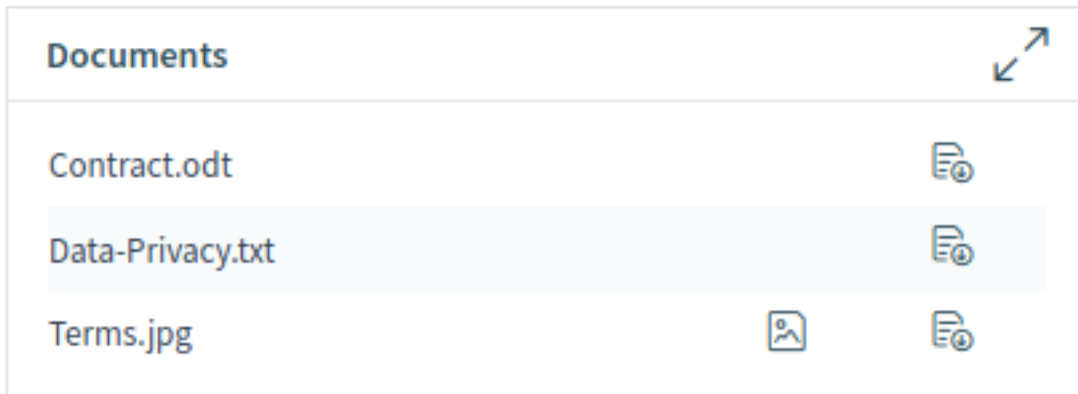
Fig. 43: Dynamic Field Attachment in Ticket Detail View

Fig. 44: Expanded Dynamic Field Attachment in Ticket Detail View

There is an option in the widget configuration where the screen after ticket creation can be selected for each type of ticket create screen separately. An agent can decide if the next screen should be the ticket create screen again or the detail view of the created ticket.

Customer Information Widget

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

Fig. 45: Customer Information Widget

Customer User History Widget

This widget shows the tickets for the customer user selected above.
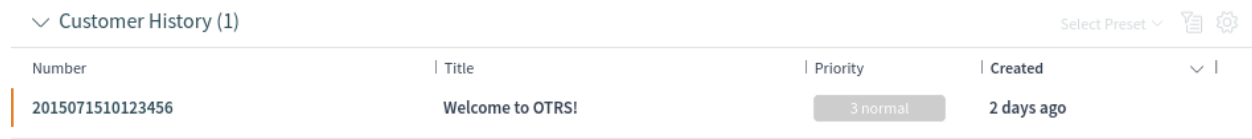
Fig. 46: Customer User History Widget

Customer History Widget

This widget shows the tickets for the customer selected above.
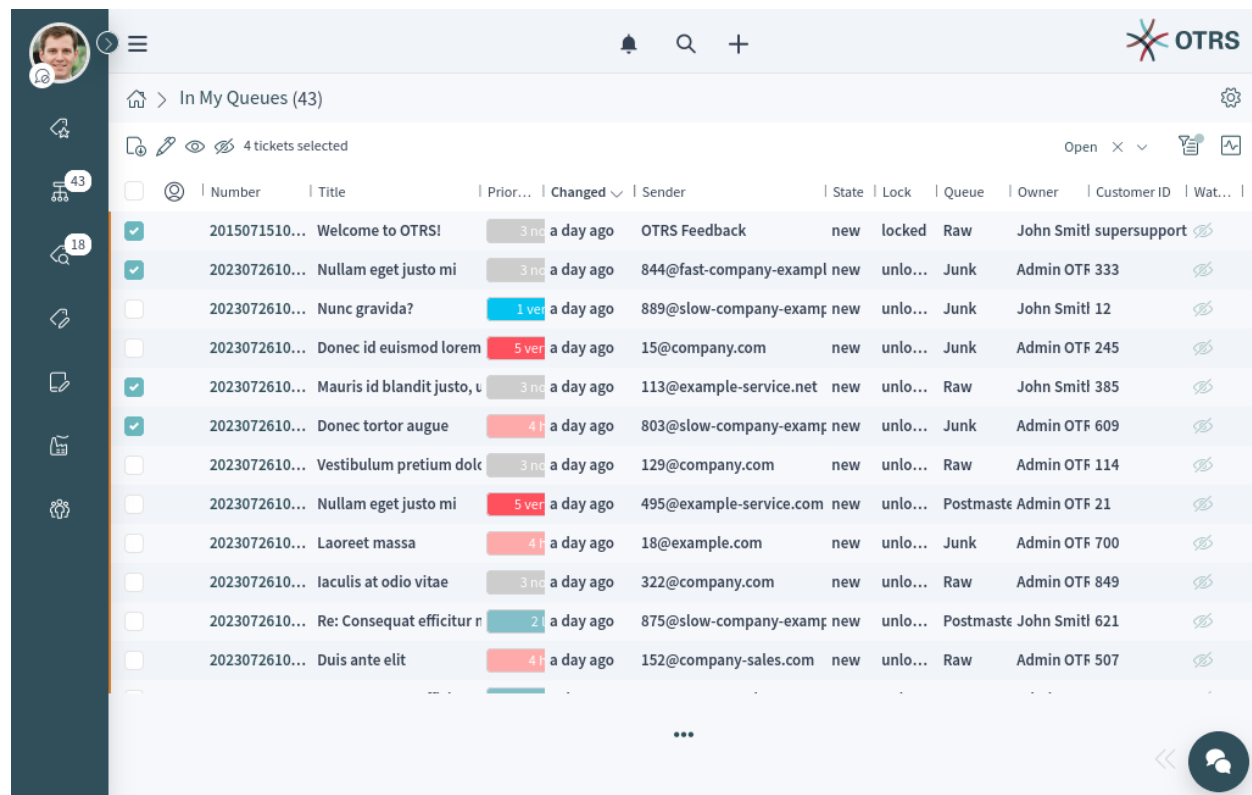
Fig. 47: Customer History Widget

1.5.2 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.

Fig. 48: Ticket List

The title column contains the subject of the last article created by a customer user. If no customer article can be found, the title column contains the subject of the latest agent or system article.

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.

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 in the same way as the owner or the responsible of the ticket.

Note: This 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. 49: 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.
>
> 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.
>
> **Do not link**
> > Select this option if the selected tickets should not be linked. This is selected by default.

Fig. 50: Change Properties

Fig. 51: Link Tickets

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.

    For this action the ticket needs to be locked to the agent who is performing the action.

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

Fig. 52: 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.

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. 53: Write Email

Fig. 54: 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.

1.5.3 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.

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.

Fig. 55: 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.

Fig. 56: 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.
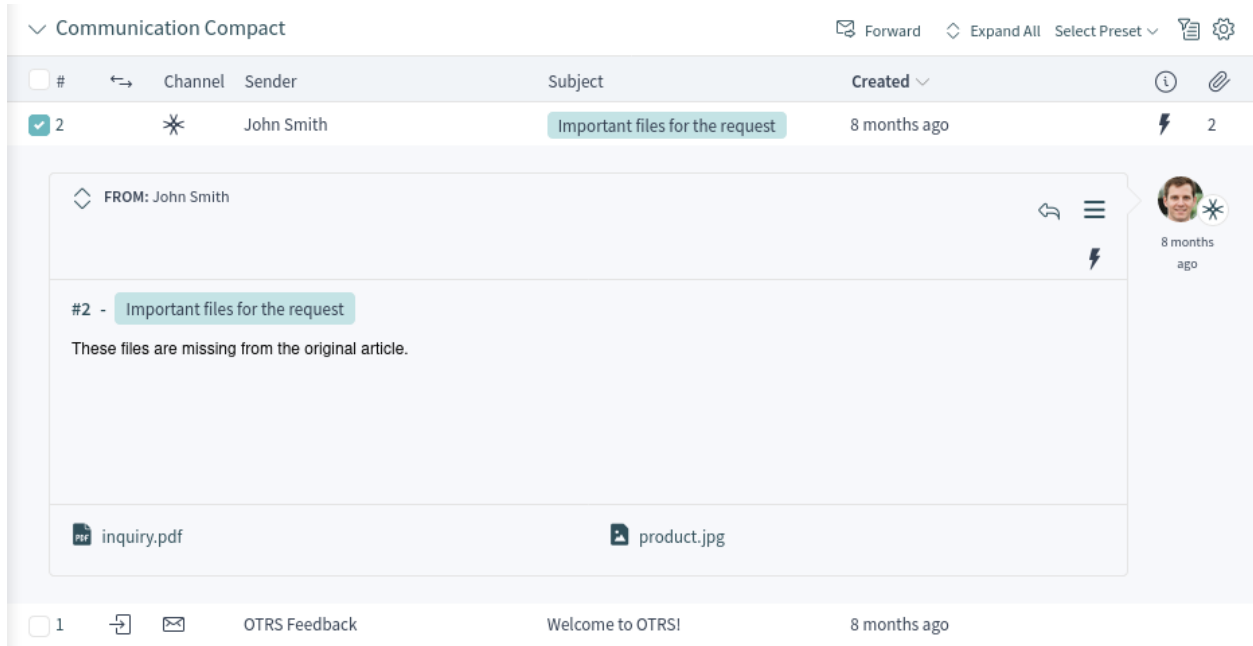
Fig. 57: Expanded Communication Compact Widget

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.

The symbols that are displayed within the message box show information that belong to this message. The symbols outside only show information about the sending status of the message.

> **Warning:** The maximum number of 500 articles per ticket should not be exceeded. Exceeding this limit may affect the system performance.

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.
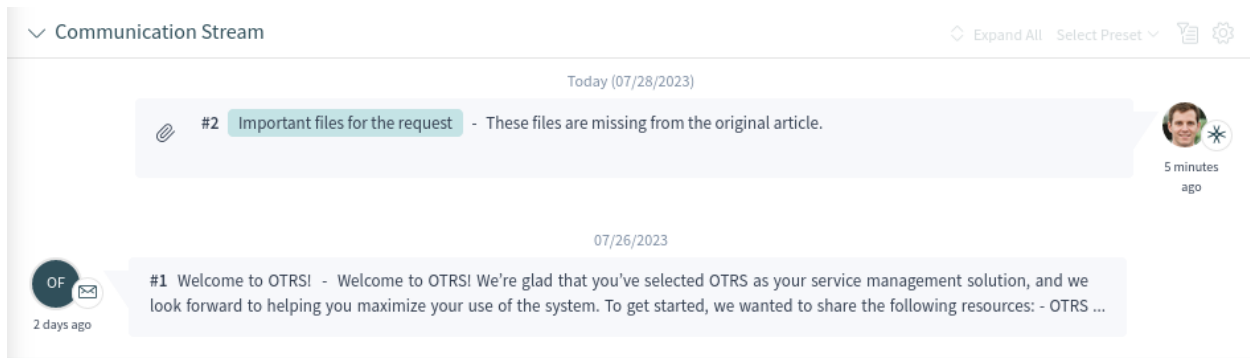
Fig. 58: Communication Stream Widget

The symbols that are displayed within the message box show information that belong to this message. The symbols outside only show information about the sending status of the message.

> **Warning:** The maximum number of 500 articles per ticket should not be exceeded. Exceeding this limit may affect the system performance.

Properties Widget

This widget shows the properties of the ticket. The properties are presented as small cards within the widget.
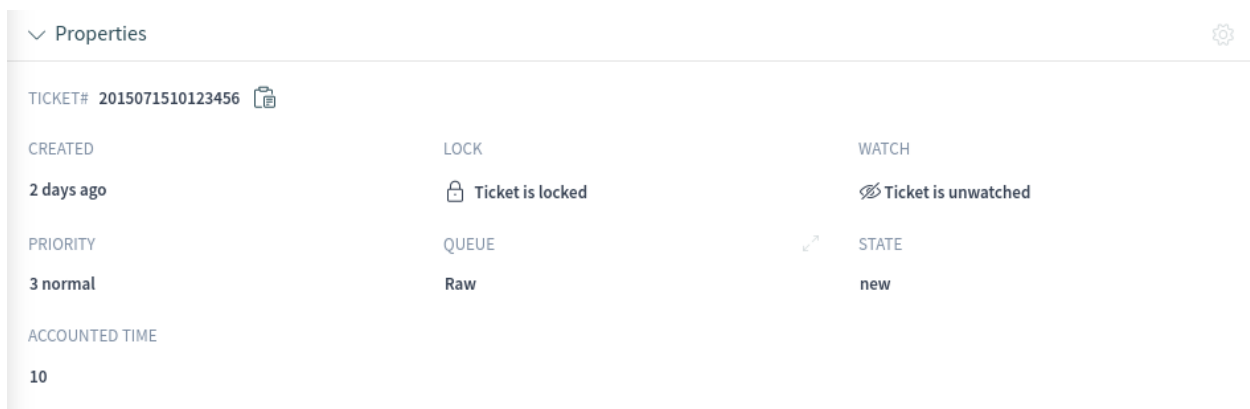
Fig. 59: Properties Widget

Most of the cards have a pen icon in the top right corner. Clicking on this icon allows agents 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.

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. 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
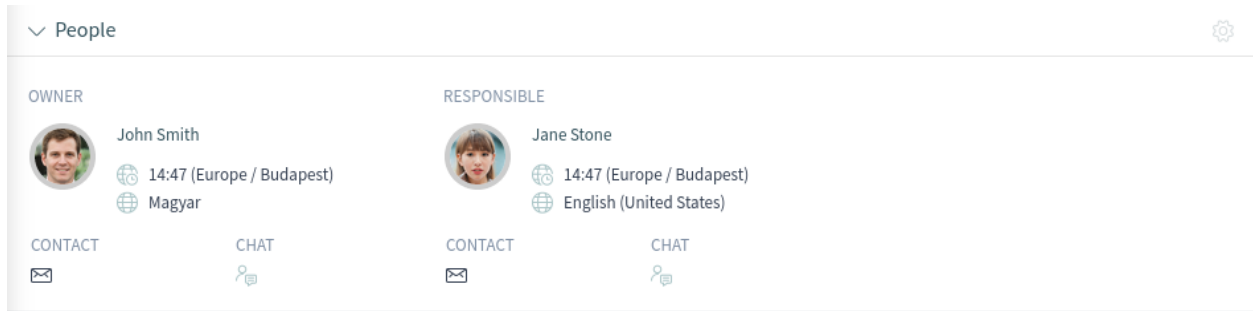
Fig. 60: People Widget
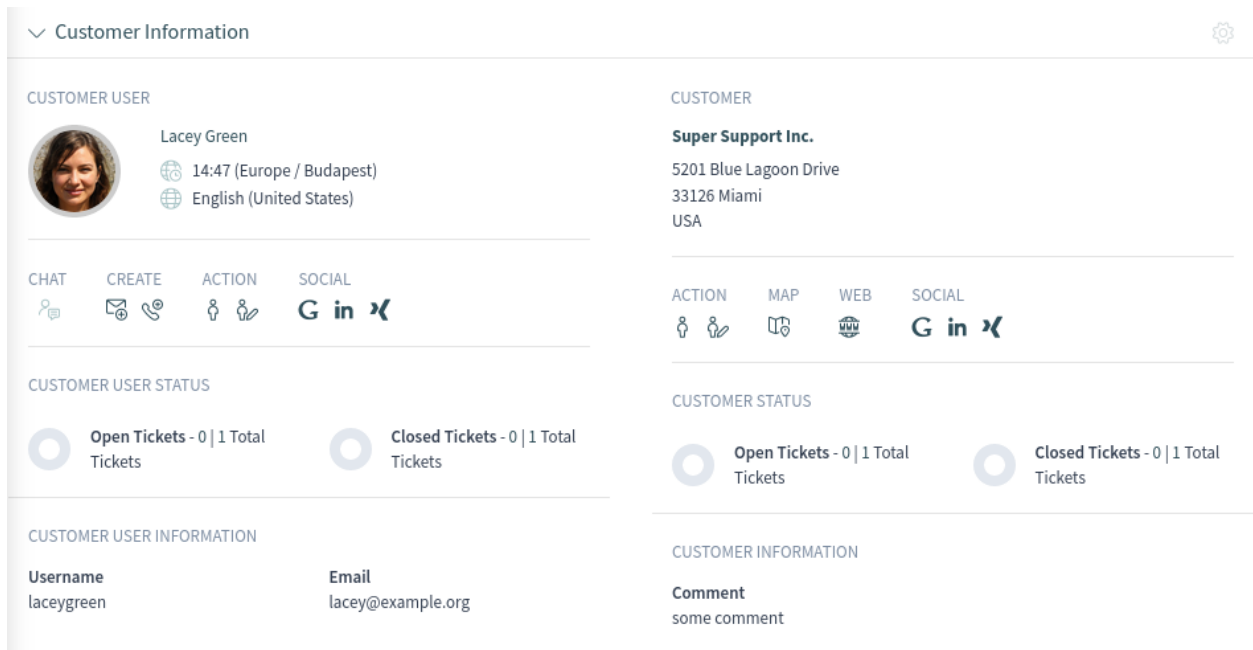
Fig. 61: Customer Information Widget

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.

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.

Fig. 62: 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.

Fig. 63: Linked Knowledge Base Articles Widget

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.

Fig. 64: Linked Appointments Widget

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.

	Type	Filename	File size	Create time		Direc...	Article		Preview		Download	
☐	📄	inquiry.pdf	8.84 KB	5 minutes ago			#2 - Important files for the request				⬇	
☐	🖼	product.jpg	291.31 KB	5 minutes ago			#2 - Important files for the request		🖼		⬇	

Fig. 65: Attachments Widget

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.

For this action the ticket needs to be locked to the agent who is performing the action.

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 action is typically used to involve third parties via email without the customer user of the ticket being able to view this mail communication. For this reason, the article is not visible to the customer user by default. If the addressee (the third party) sends a reply email, this reply is also not visible to the customer user of the ticket.

For this action the ticket needs to be locked to the agent who is performing the action.

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

For this action the ticket needs to be locked to the agent who is performing the action.

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 the ticket, for example the title of the ticket.

If a ticket dynamic field of type attachment has been configured to be displayed in a ticket action form, it is possible to delete the uploaded files and add new files.

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

→ Watch Ticket

→ Assign Process

→ New Appointment

→ Close Ticket

→ Link Objects

→ Move Ticket

→ Set Pending Time

→ Change Priority

People

→ Change Owner

→ Change Responsible

→ Change Customer

Views

→ Print Ticket

→ View History

Fig. 66: Ticket Detail View Actions

To delete a file from a ticket dynamic field of type attachment:

1. Make sure that the dynamic field of type attachment is added to the *Change Free Fields* action.

2. Click on the X icon in the last column of an attachment. The attachment will be deleted without confirmation!

Change Decision
In this window the decision result and the decision date can be set.

Change Additional ITSM Fields
In this window the additional ITSM fields can be set regarding to repair and recovery start time, as well as the due date.

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

For this action the ticket needs to be locked to the agent who is performing the action.

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

Assign Process
This action allows agents to assign this ticket and all articles to a process.

Note: This feature is only available when at least one process is deployed.

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.

For this action the ticket needs to be locked to the agent who is performing the action.

Delete Ticket
This action allows agents to delete the ticket.

For this action the ticket needs to be locked to the agent who is performing the action.

Note: This feature 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 used to assign tickets to the responsible group of people. A ticket can belong to only one queue at a time.

For this action the ticket needs to be locked to the agent who is performing the action.

Set Pending Time
This action allows agents to set the pending time of the ticket. If the customer user sends another message before the reminder time runs out, the agent can answer and select the *pending* status again without having to re-enter the reminder time, title and text, as this information is added automatically. If the reminder time expires, the default values are used.

For this action the ticket needs to be locked to the agent who is performing the action.

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

For this action the ticket needs to be locked to the agent who is performing the action.

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

For this action the ticket needs to be locked to the agent who is performing the action.

Note: This feature 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: This 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: This 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.

Watchlists

Note: The feature should be turned on with `Ticket::Watchlist` setting first. In order to restrict this feature to specific groups, verify the `Ticket::WatchlistGroup` setting in the system configuration. By default, all users will have access to this feature.

It is possible to customize the watch list notifications in the *Ticket Notifications* screen.

Use this menu item to add tickets to a watchlist or to remove tickets from a watchlist. The menu item *Watchlists* is available in the breadcrumb bar.
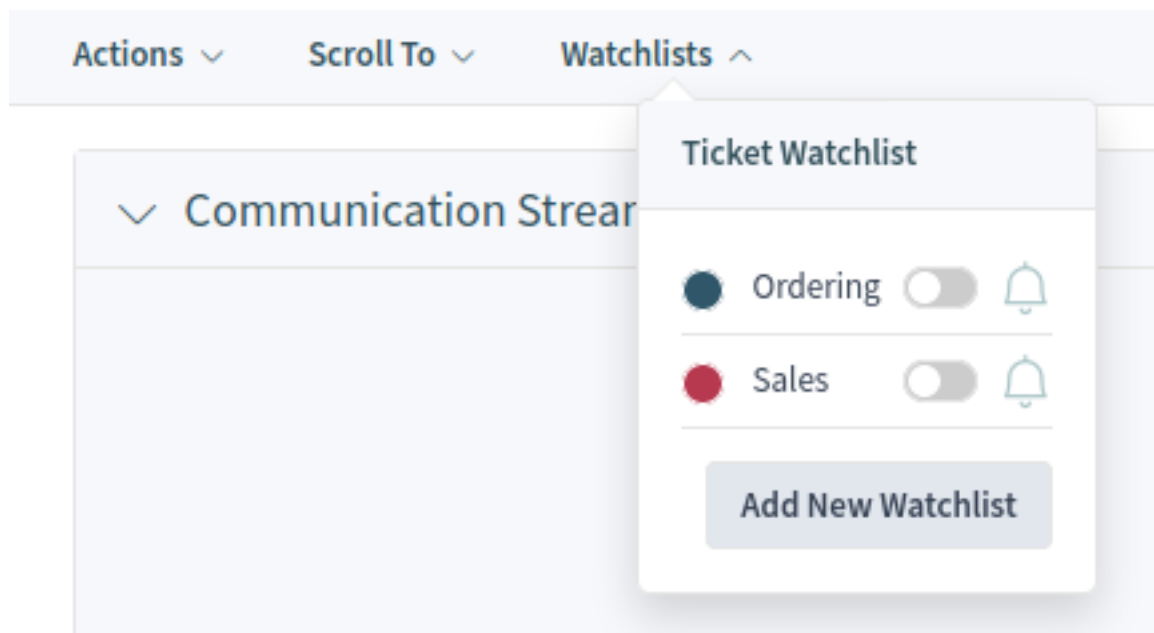
Fig. 67: Watchlists Menu

The ticket can be assigned to a watchlist via this menu item by using the toggle button. Additionally, the ticket can be removed from a watchlist. The *Add New Watchlist* button opens the *Ticket Watchlist Overview* screen and the *Create Ticket Watchlist* action.

If the ticket is added to the watchlist, the menu item will be changed to the color defined for the watchlist. If the ticket is added to multiple watchlists, all colors will be displayed.

Use the bell icon to set a reminder for the ticket in the watchlist. For this, the agent has to be subscribed to the ticket or it has to be assigned to one of his watchlists.

Note: This option is visible only, if the ticket is already added to a watchlist.

The *Watchlist Reminder* action has the following fields by default:
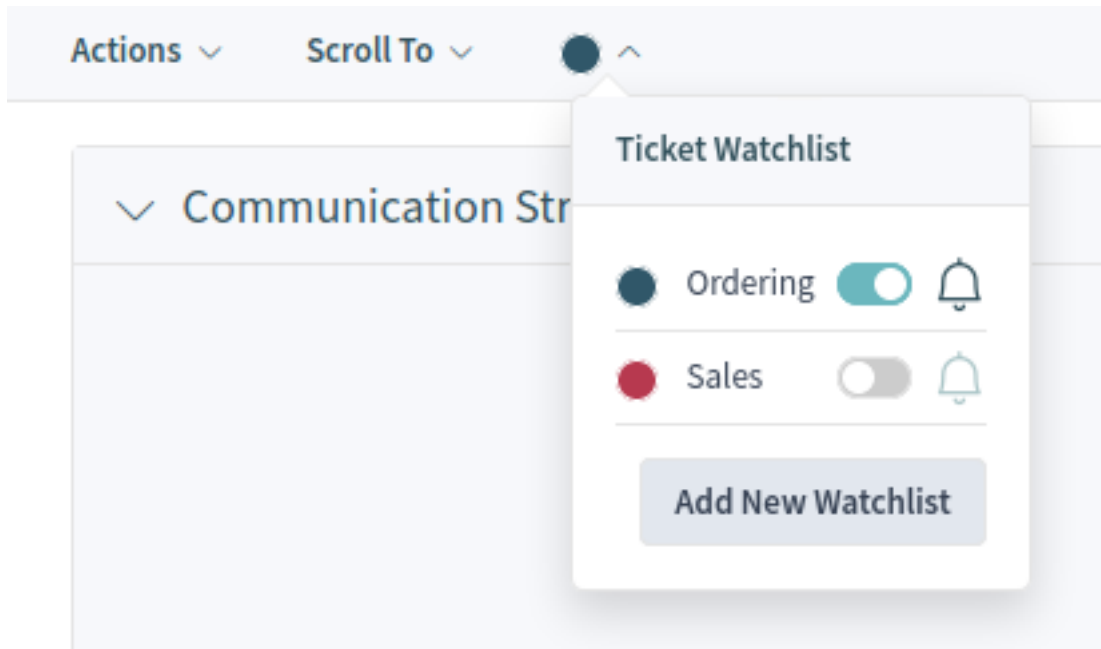
Fig. 68: Added Ticket to Watchlist

Reminder active
> Controls, whether the reminder is active or not. New reminders will be added only if this checkbox is checked. For existing reminders, unchecking the checkbox will remove the reminder.

Reminder Time *
> Set the date and time when the reminder should be displayed.

Reminder for *
> Select a watchlist from the drop-down list.

Note
> Add additional information to the reminder text.

Note: There can only be one active reminder per agent and ticket. Notifications are only being sent every ten minutes.

If a reminder is defined for the ticket in a watchlist, the bell icon will be filled.

A watchlist belongs to the agent who created it. The list can be moved to another agent in the *Ticket Watchlist Overview* screen. When moving a watchlist to another agent, reminders will also be moved.

In this case, where the owner of the watchlist is changed, the notification that is sent is different that the others. It can only be sent by the email notification method and it should not contain any ticket related OTRS smart tag (if so they will be removed before sending) as there is no ticket involved in the process that triggers the event.

The default *Watchlist move notification* is attached to the event `WatchlistMoveNotification`. This and any other ticket notification attached to the same event should prevent the use of these ticket related OTRS smart tags.

Reminders will only be sent if the assigned agent at this time still has access to the watchlist containing the ticket and/or still is subscribed to the ticket.
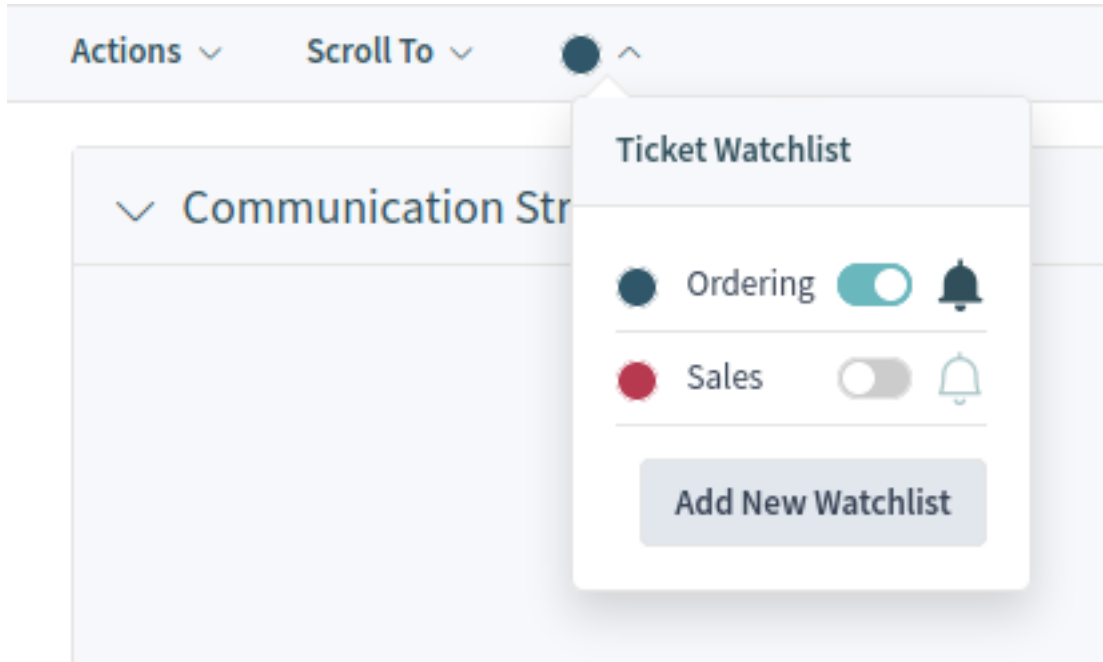
Fig. 69: Active Watchlist Reminder

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.
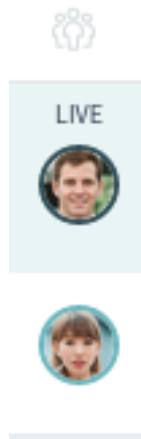
Fig. 70: Sidebar

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.

1.6 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.
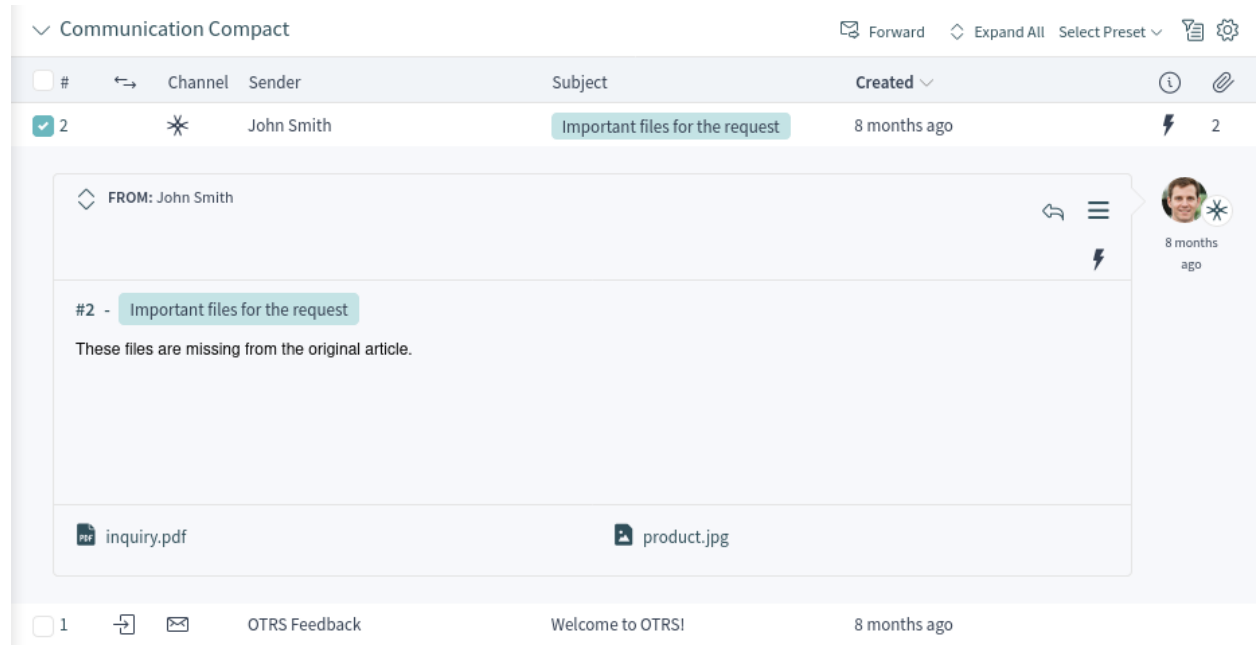
Fig. 71: Expanded Communication Compact Widget

Ticket articles can be sent as email attachments. The agents can select multiple articles from one ticket and forward them at the same time instead of forwarding only a single article. A checkbox is displayed next to each article in the *Communication Stream* and in the *Communication Compact* widgets and a *Forward* menu item is displayed in the header of the widget. Clicking on this menu item opens the *Forward via Email* action and attaches all selected articles as attachments.

The dynamic field of type attachment is displayed in the header of the article, if it is added to the screens and at least one file has been uploaded.

To download a file from an article dynamic field of type attachment:

1. Select an article, that has a dynamic field of type attachment with at least one uploaded file.

2. Expand the article.

3. Find the attachments in the article header.

4. Click on a filename to download the file.
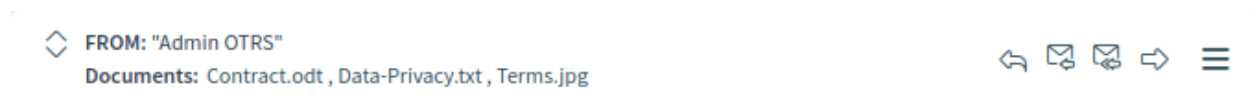
Fig. 72: Dynamic Field Attachment in Article Header

Note: It is not possible to delete files from dynamic field of type attachment created for article object.

1.6.1 Article Detail View Actions

The following actions are available in the article detail view.

Fig. 73: 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.

      If the sender of an article is not the customer user, this action sets the original sender into the *To* field and adds the customer user to the *Cc* field for external articles. If the article is internal, then the original sender is set into the *To* field (if email is available) and the customer user is not added to the *Cc* field or any other fields.

      For this action the ticket needs to be locked to the agent who is performing the action.

   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.

      For this action the ticket needs to be locked to the agent who is performing the action.

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.
>
> For this action the ticket needs to be locked to the agent who is performing the action.
>
> If the sender of an article is not the customer user, this action sets the original sender into the *To* field and adds the additional recipients and the customer user to the *Cc* field for external articles. If the article is internal, then the original sender is set into the *To* field (if email is available) and the additional recipients are added to the *Cc* field; the customer user is not added to the *Cc* field or any other fields.

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.
>
> For this action the ticket needs to be locked to the agent who is performing the action.

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).
>
> For this action the ticket needs to be locked to the agent who is performing the action.

> ---
> **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.

Templates

Templates with category folder structure can be defined to create article more quickly. This folder structure will be shown in any forms that produce an article. The folder structure is a drop-down field named *Text Template*, where the template can be selected in a category tree.
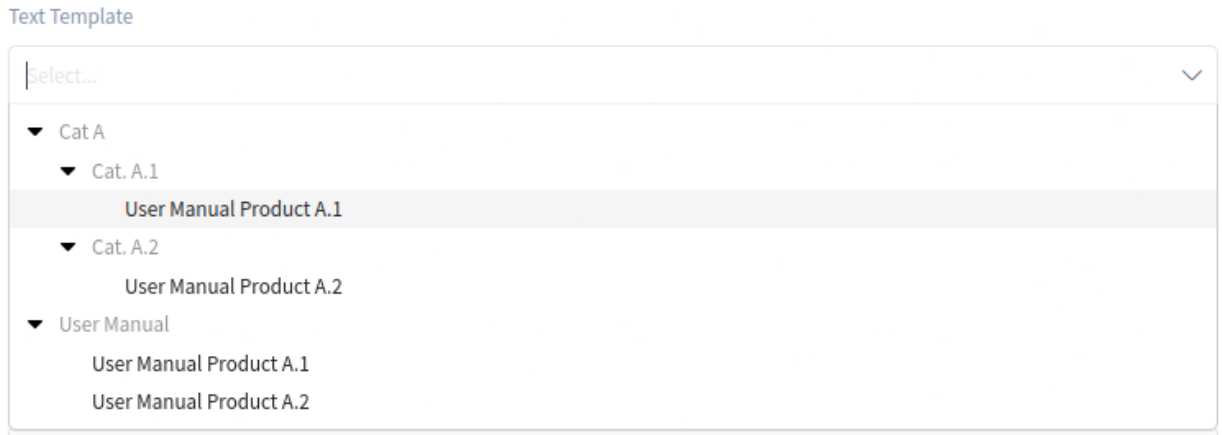
Fig. 74: Text Template Field

Note: The type of the template and the queue of the ticket determine whether a template is displayed in a specific category folder structure. The category determines in which category structure the template is shown.

1.7 Services

Note: In order to grant users access to the *Service Management* menu, you need to add them as member to the group *itsm-service*.

1.7.1 Service List

Use this screen to get a list of services directly in the agent interface. The *Services* menu item is available in the main menu.

A view on services and configuration items, including information on each object's current state, allows you to analyze an incident and calculate the incident's impact on affected services and customers, and service level agreements and linked configuration items are also displayed. For each configuration item, the current incident state is shown. In addition, the incident state will be propagated for dependent service level agreements and configuration items. If a service is selected, the service detail view will be shown, now with the additional current incident *State*, which is calculated from the incident states of dependent services and configuration items.

Service states can have one of the following three values:

- Operational (green)

Fig. 75: Service List

- Warning (yellow)

- Incident (red)

The propagation of the incident state will be carried out if configuration items are linked to other business objects. Linking the configuration items is a manual task. The following combination of linking is possible in a default installation:

First Business Object	Second Business Object	Source Link	Target Link
Configuration item	Configuration item	Alternative to	Alternative to
Configuration item	Configuration item	Connected to	Connected to
Configuration item	Configuration item	Depends on	Required for
Configuration item	Configuration item	Includes	Part of
Configuration item	Configuration item	Relevant to	Relevant to
Configuration item	Ticket	Alternative to	Alternative to
Configuration item	Ticket	Depends on	Required for
Configuration item	Ticket	Relevant to	Relevant to
Configuration item	Service	Alternative to	Alternative to
Configuration item	Service	Depends on	Required for
Configuration item	Service	Relevant to	Relevant to
Configuration item	Knowledge base article	Normal	Normal
Configuration item	Knowledge base article	Parent	Child
Configuration item	Knowledge base article	Relevant to	Relevant to
Service	Knowledge base article	Normal	Normal
Service	Knowledge base article	Parent	Child
Service	Knowledge base article	Relevant to	Relevant to

Source and target links can be swapped to link the business objects each other. Thanks to this mechanism, the linking can be started in any type of business object detail view via the *Link Objects* action.

See also:

The linking possibilities can be extended in the system configuration.

By default, only *Depends on* linking has underlying logic. Here the following rules apply:

- If a configuration item is dependent on another configuration item, which is in the state *Incident*, the dependent configuration item gets the state *Warning*.

- If a service is dependent on configuration items, and one of these configuration items has a state *Incident*, the service will also get the state *Incident*.

- If a service is dependent on configuration items, and one of these configuration items has the state *Warning*, the service will also get the state *Warning*.

- If a service has sub-services, and one of these services has the state *Incident*, the parent service will get the state *Warning*.

- If a service has sub-services, and one of these services has the state *Warning*, the parent service will get the state *Warning*.

Any other link type does not affect the incident state of services.

The states of the respective services, sub-services, and configuration items will be shown in the view.

See also:

Read the chapter about configuration items to setup the dynamic calculation of service states.

1.7.2 Service Detail View

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

Service Detail View Widgets

Like other business object detail views, the service 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.

Service Information Widget
This widget shows information about the service.
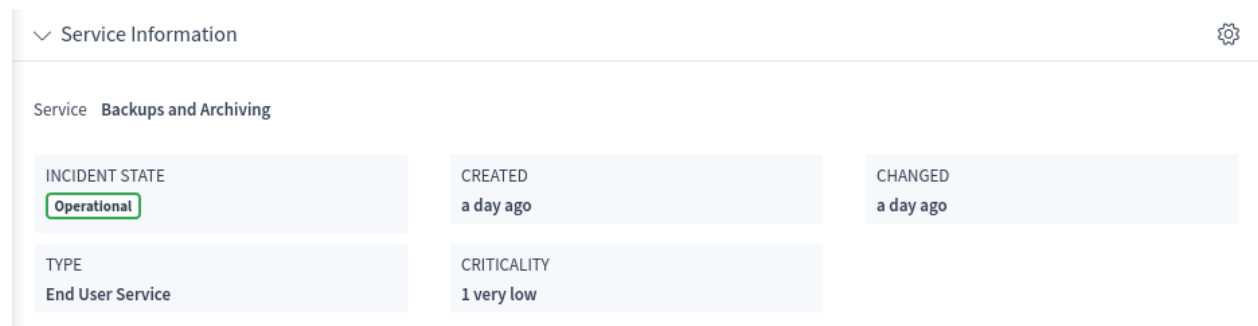
Fig. 76: Service Information Widget

Associated SLAs Widget
 This widget shows the service level agreements that are associated to the service. If you click on a
 service level agreement, the *Service Level Agreements* detail view will open.

Fig. 77: Associated SLAs 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.

Fig. 78: Linked Knowledge Base Articles Widget

Service Detail View Actions

The following actions are available in the service detail view.

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

Print Service
 This action allows agents to print the service to a PDF file and to download it.

1.8 Service Level Agreements

Note: In order to grant users access to the *Service Management* menu, you need to add them as member
to the group *itsm-service*.

1.8.1 Service Level Agreement List

Use this screen to get a list of service level agreements directly in the agent interface. The *Service Level Agreements* menu item is available in the main menu.

Fig. 79: Service Level Agreement List

1.8.2 Service Level Agreement Detail View
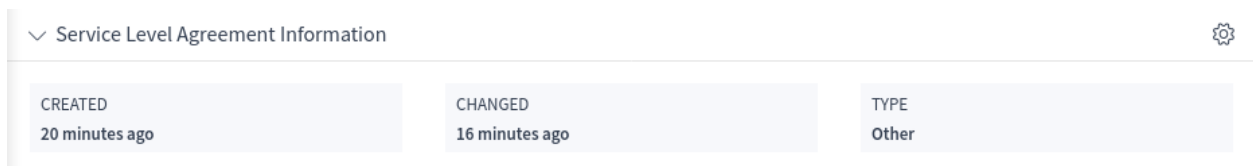
Use this screen to see the details of a service level agreement. The service level agreement detail view is available if you select a service level agreement from a service level agreement list.

Service Level Agreement Detail View Widgets

Like other business object detail views, the service level agreement 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.

Service Level Agreement Information Widget
    This widget shows information about the service level agreement.
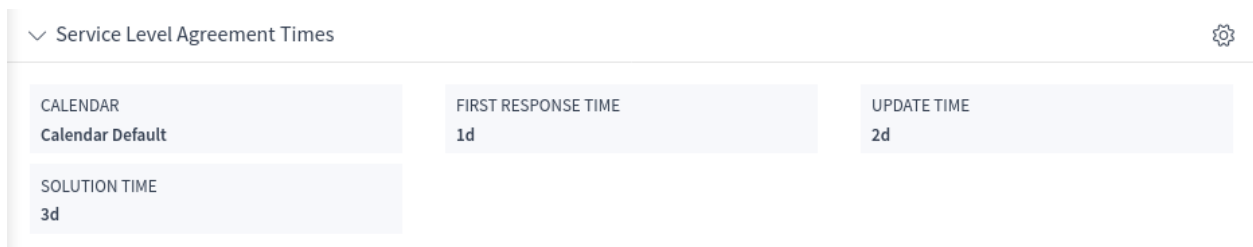
Fig. 80: Service Level Agreement Information Widget

Service Level Agreement Times Widget
    This widget shows times related to the service level agreement.

Fig. 81: Service Level Agreement Times Widget

Services Requiring Action Widget
>   This widget lists the services that have the incident state *Warning* or *Incident*.

Fig. 82: Services Requiring Action Widget

Associated Services Widget
>   This widget shows the services that are associated to the service level agreement. If you click on a
>   service, the *Services* detail view will open.

Fig. 83: Associated Services Widget

Service Level Agreement Detail View Actions

The following actions are available in the service level agreement detail view.

Print Service Level Agreement
>   This action allows agents to print the service level agreement to a PDF file and to download it.

1.9 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.

1.9.1 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.

Fig. 84: Create Knowledge Base Article

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.

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.

1.9.2 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.

Fig. 85: Knowledge Base Article List

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

1.9.3 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.

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.
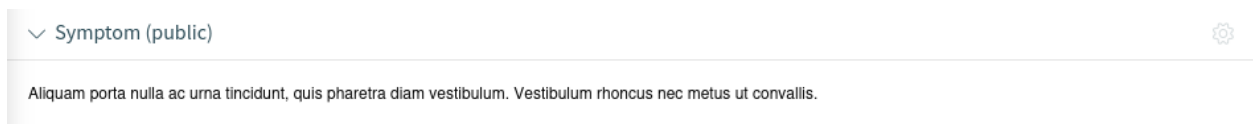
Fig. 86: Symptom Widget

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

Solution Widget
>   This widget can be used to describe the solution of the problem.
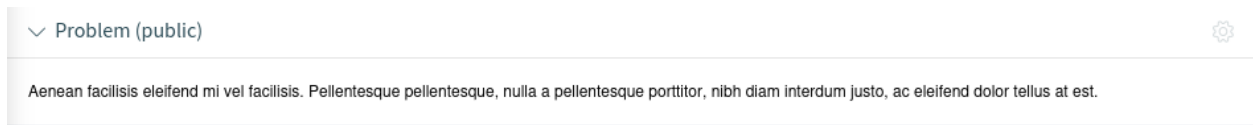
Fig. 87: Problem Widget
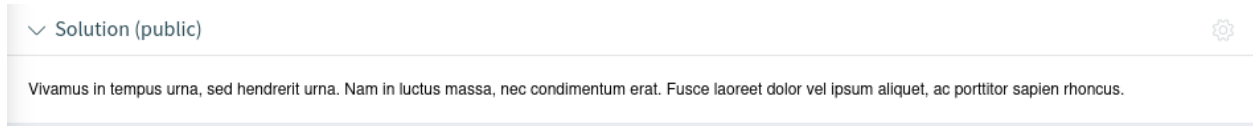
Fig. 88: Solution Widget

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 agents to directly edit the property.
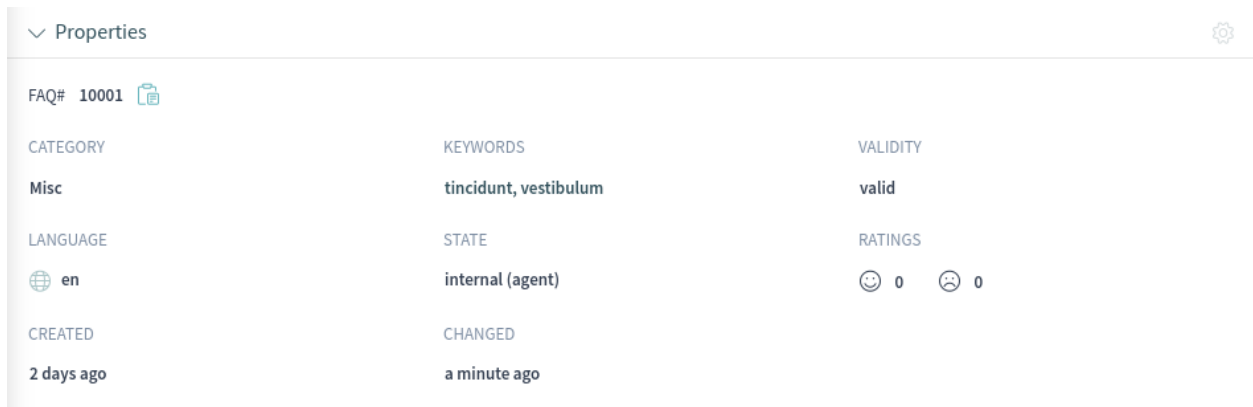
Fig. 89: Properties Widget

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.

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.

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.

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.

Linked Appointments Widget

This widget shows appointments that are linked to the knowledge base article. The widget is only

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Fig. 90: Attachments Widget

Fig. 91: Rating Widget

Fig. 92: Linked Tickets Widget

Fig. 93: Linked Knowledge Base Articles Widget

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.

Fig. 94: Linked Appointments Widget

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

Fig. 95: Comment Widget

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

Fig. 96: People Widget

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:

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.

Fig. 97: Knowledge Base Article Detail View Actions

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.

1.10 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.

1.10.1 Create Customer

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

To add a customer:

1. Choose a 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.

Fig. 98: Select Data Source

Fig. 99: Add Customer Data

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.

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, address information about 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.

1.10.2 Customer List

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

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 a customer's 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.

Fig. 100: Customer List

1.10.3 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.

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.

Fig. 101: 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 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.

Fig. 102: Escalations Widget

Reminders Widget

This widget lists the customer's pending tickets. Pending tickets are set for work at a later time by the agent, and the reminder time is going to expire soon.

Clicking on a ticket opens the ticket detail view.

Fig. 103: Reminders Widget

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.
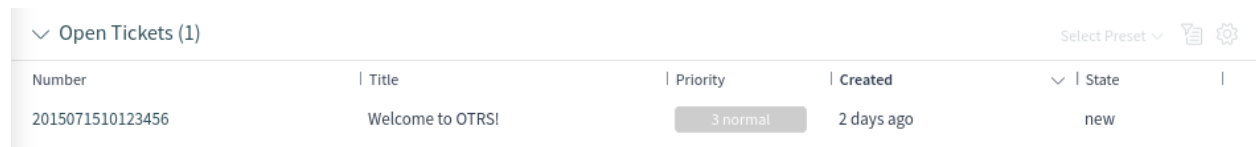
Fig. 104: Open Tickets Widget

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 the 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.

	Username	Firstname	Lastname	Email	CustomerID	Validity	Open	Closed	Chat	Create	Edit	
	laceygreen	Lacey	Green	lacey@example.org	supersupport	valid	1	0				
	robertmeyer	Robert	Meyer	robert@example.org	supersupport	valid	0	0				

Fig. 105: Customer Users Widget

Title	Priority	Created	State	Sender	Lock	Queue	Owner	Customer ID	Watch	
Welcome to OTRS!	3 normal	2 days ago	new	OTRS Feedback	locked	Raw	John Smith	supersupport		

Fig. 106: Ticket List Widget

Customer Detail View Actions

The following actions are available in the customer detail view.

Fig. 107: Customer Detail View Actions

Organization
> This column groups the following actions together:
>
> **Edit Customer**
> > This action allows the 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.

1.11 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.

1.11.1 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.
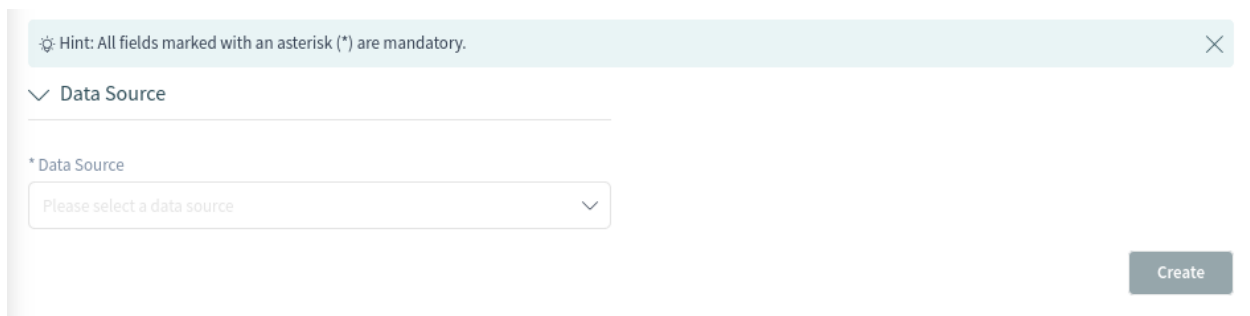
Fig. 108: Select Data Source

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, the data source for storing customer users can be selected. Multiple data sources are supported, including external data sources like LDAP.

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.

☼ Hint: All fields marked with an asterisk (*) are mandatory.   ✕

∨ Data Source   ∨ Security

* Data Source   * Login Forbidden ⬚

| Database Backend   ∨ | | No   ∨ |

∨ Personal Information   ∨ Miscellaneous

Title or salutation   Comment

| Enter... | | Enter... |

* Firstname

| Enter... |

* Lastname

| Enter... |

* Email

| Enter... |

* CustomerID

| Start typing...   🔍 |

Phone

| Enter... |

Fax

| Enter... |

Mobile

| Enter... |

∨ Address

Street

| Enter... |

Zip

| Enter... |

City

| Enter... |

Country

| Enter... |

∨ Login Credentials

* Username

| Enter... |

Password

| ⊘ |

The password must contain at least:

⊗ 12 characters

* Valid

| valid   ∨ |

Create

Fig. 109: Add Customer User Data

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 *

> Set the validity of this customer user. Customer users 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 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 about 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.

1.11.2 Customer User List

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

Fig. 110: Customer User List

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.

It is possible to preview a customer user's 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.

1.11.3 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.

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.

Fig. 111: Customer Information Widget

Clicking on a ticket opens the ticket detail view.

Fig. 112: Escalations Widget

Reminders Widget

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

Clicking on a ticket opens the ticket detail view.

Fig. 113: Reminders Widget

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.

Ticket List Widget

This widget lists all of the tickets related to the customer user.

Clicking on a ticket opens the ticket detail view.

Fig. 114: Open Tickets Widget

Fig. 115: Ticket List Widget

Customer User Detail View Actions

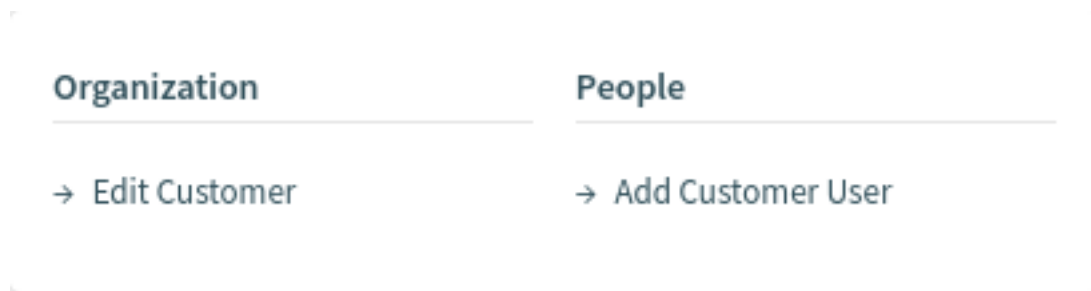The following actions are available in the customer user detail view.

Fig. 116: 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 the agent 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.
> ---

1.12 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 with possible browser notification support. 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.
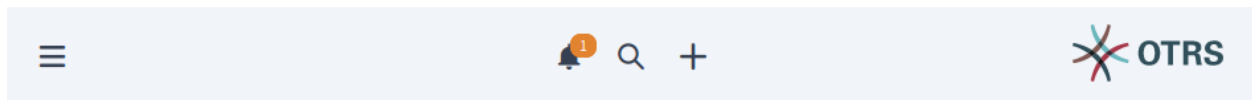
Fig. 117: New Notification Received

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

Fig. 118: 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.

Fig. 119: Ticket Notifications Widget

The possible methods are *Email*, *Web View* with *Browser Notification* support or *SMS*.

1.12.1 Notification List

The notification list shows the ticket notifications and appointment notifications.

Fig. 120: Notification List

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.

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.

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.

Notification

Subject: Ticket Created: Etiam viverra dignissim ligula
When: 08/07/2023 14:18

Hi John,

ticket [Ticket#2023080710000018] has been created in queue Postmaster.

Lacey Green wrote:

> Nulla vehicula arcu sit amet eros malesuada, sit amet scelerisque turpis
> ultricies. In nec ligula sapien. Vestibulum ante ipsum primis in faucibus orci
> luctus et ultrices posuere cubilia curae; Etiam libero nunc, bibendum vitae
> pretium quis, tristique sed nisl. Etiam vel ante ante. Nam varius ac libero et
> efficitur. Curabitur eu tincidunt felis, a molestie nulla. Praesent augue
> libero, tincidunt eu quam at, fringilla interdum arcu. Interdum et malesuada
> fames ac ante ipsum primis in faucibus. Aliquam egestas eu felis ut elementum.
> Ut dignissim accumsan ex quis fringilla. Vestibulum lacinia turpis ac sem
> pretium lacinia.

http://yourhost.example.com/agent/ticket/44

-- OTRS Notifications

Show Ticket

Fig. 121: Notification Details

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

1.13 Ticket Watchlist Overview

This feature allows you to manage several watchlists. A ticket agent defines watchlists and assigns tickets to a watchlist. Within the watchlist overview, the agent gets an overview of all of his watchlists and can administer them.

> **Note:** The feature should be turned on with `Ticket::Watchlist` setting first. In order to restrict this feature to specific groups, verify the `Ticket::WatchlistGroup` setting in the system configuration. By default, all users will have access to this feature.
>
> It is possible to customize the watch list notifications in the *Ticket Notifications* screen.

When the feature is enabled, the agent can perform the following actions.

Define notification events for each watchlist
> The agent is able to administer the following events which trigger an email notification to himself:
>
> - new article
> - change of customer
> - change of owner
> - change of queue
> - change of ticket status to a defined status
>
> This email notification is independent of the notification preferences of the current owner of the ticket –unlike the standard subscribe/watchlist feature of **OTRS**.

Assign a watchlist to another agent
> A watchlist can be handed over to another agent. The list will disappear in the overview of the former owner and appear in the overview of the new owner. This feature is typically used to hand the list over to another agent when the original agent goes on vacation.

Assign a deputy
> One or more deputy agents can be assigned to a watchlist. A deputy then sees the new watchlist in his overview, and he is allowed to add or remove tickets to or from this watchlist. This feature is typically used to share a watchlist with colleagues to work on a ticket in a team.

Export to CSV
> The list can be exported to a CSV file, e. g. to process it in Excel.

Use this screen to manage watchlists. The ticket watchlist overview screen is available from the organizer via the glasses icon.

This screen is not designed for accessing tickets which are assigned to a ticket watchlist. To see all tickets which are assigned to a ticket watchlist, there is a new filter *Watchlist* available in all ticket lists.

Fig. 122: Ticket Watchlist Overview Screen

Fig. 123: Ticket Watchlist Column in Ticket List

1.13.1 Manage Watchlists

To add a watchlist:

1. Click on the plus icon in the breadcrumb bar.

2. Fill in the required field.

3. Click on the *Save* button.

To export the ticket list from a watchlist:

1. Click on the export button in the *Actions* column of a watchlist.

2. Select the export format.

3. Click on the *Download File* button.

4. Save the file somewhere in the file system.

To edit a watchlist:

1. Click on the edit button in the *Actions* column of a watchlist.

2. Modify the field.

3. Click on the *Save* button.

To change the watchlist owner:

1. Click on the person icon in the *Actions* column of a watchlist.

2. Select an agent from the list.

3. Click on the *Save* button.

Warning: The original owner agent will not have access to the watchlist anymore.

To assign deputies to a watchlist:

1. Click on the police badge icon in the *Actions* column of a watchlist.

2. Select deputy agents from the list.

3. Click on the *Save* button.

To delete a watchlist:

1. Click on the trash icon in the *Actions* column of a watchlist.

2. Click on the *Yes* button in the confirmation dialog.

Tickets can be added to the watchlist or removed from the watchlist in the *Tickets* screen.

1.13.2 Watchlist Settings

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

Name *
> The name of this resource. Any type of characters can be entered to this field including uppercase letters and spaces. The name will be displayed in the overview table.

Color *
> The color associated to the watchlist. This color will be displayed in the ticket detail view when a whatchlist is selected for the ticket.

Notify On
> Select the events that will trigger a notification.

> **New Agent Article**
>> Select, if the watchlist owner should be notified, when an agent adds a note to a ticket added to the watchlist.

> **New Customer Article**
>> Select, if the watchlist owner should be notified, when a customer user creates an article in the external interface.

> **New Owner**
>> Select, if the watchlist owner should be notified, when a ticket added to the watchlist has a new owner.

> **New Queue**
>> Select, if the watchlist owner should be notified, when a ticket added to the watchlist has been moved to an other queue.

> **New State**
>> Select, if the watchlist owner should be notified, when a state is changed for a ticket added to the watchlist.

> **Target States**
>> Notifications for status changes are only being sent if the new status matches the configured destination status.

>> If the *New State* notification above is selected, this field becomes mandatory.

Watchlist owners and their deputies can configure the notifications separately. The configuration of the destination status is only allowed for the watchlist owner and therefore also affects the deputies.

Notifications are not being sent to the agent who triggered the action.

See also:

The content of the notifications can be edited in the ticket detail view when the ticket is assigned to a watchlist. See the *Tickets* chapter for more details.

1.14 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.

1.14.1 Reports

Reports are automatically generated statistics in PDF format, which can be sent via email.

See also:

The `GoogleChrome::Bin` setting needs to be activated in the system configuration in order to include graphs and diagrams in the PDF file.

In this widget, it is possible to set statistics as reports.
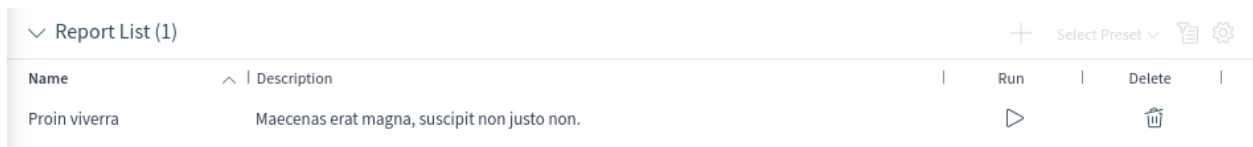
Fig. 124: Report List Widget

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 if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the report.

3. Select the times when the report will be automatically generated and fill in the email details.
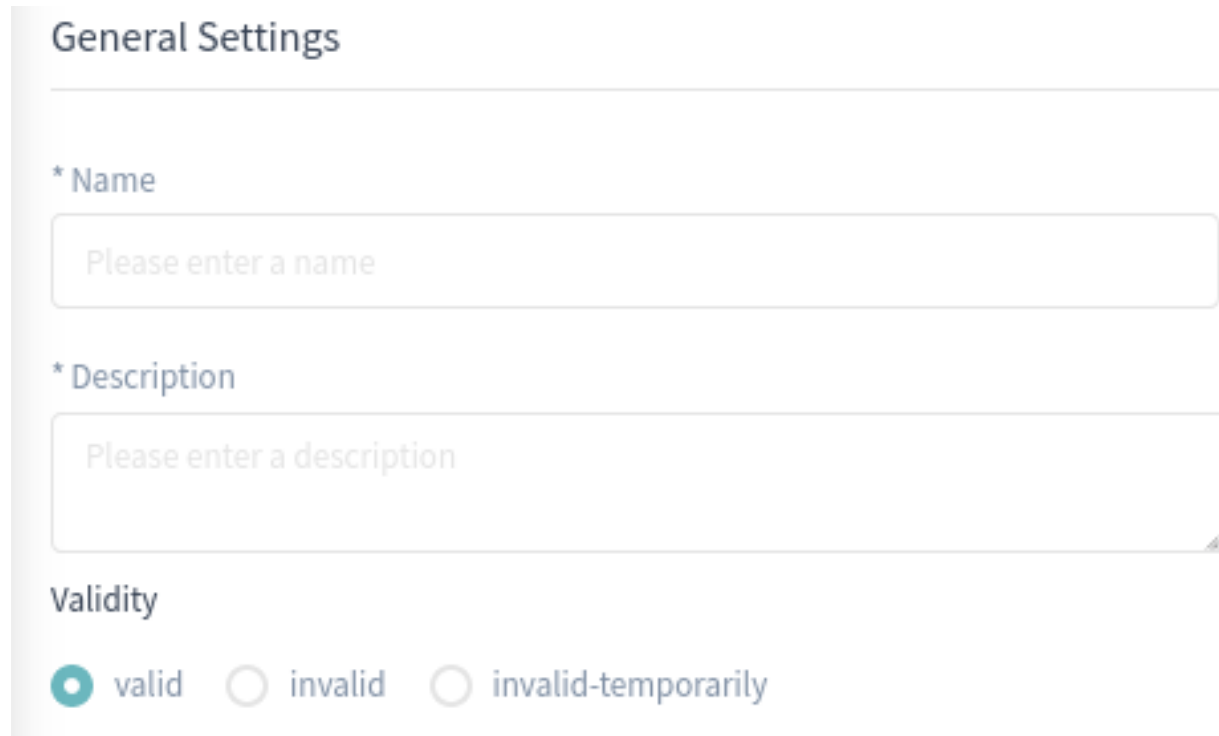
   No schedule
   : No email will be sent automatically.

   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.

Fig. 125: General Report Information

Note: Scheduled tasks are using the local system time provided by the operating system OTRS is running on.

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.

Fig. 126: Automatic Generation Settings

Fig. 127: Output Settings

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.

> **Note:** Only statistics for which *Print* is defined as the result format in the general settings of the statistics can be added to the report, if the `GoogleChrome::Bin` setting is not activated in the system configuration.

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.

1.14.2 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 lists the statistics that are displayed in a table format.

Stat#	∧	Title		Object Name		Export		Run		Delete	
10009		New Tickets		TicketAccumulation				▷		🗑	
10011		Overview about all tickets in the system		TicketAccumulation				▷		🗑	

Fig. 128: Metrics Widget

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

Static Widget
    This widget lists the static statistics.

Fig. 129: Lists Widget

Fig. 130: Static Widget

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 about the statistic.

   Title *
   > Add a title for the statistic.

   Description *
   > Longer description about the statistic.

   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. Possible formats are *CSV*, *Excel*, *Graph* and *Print* based on the selected statistic type.

   Time Zone *
   > Select a time zone for the generated statistic. The selected time periods in the statistic are time zone neutral.
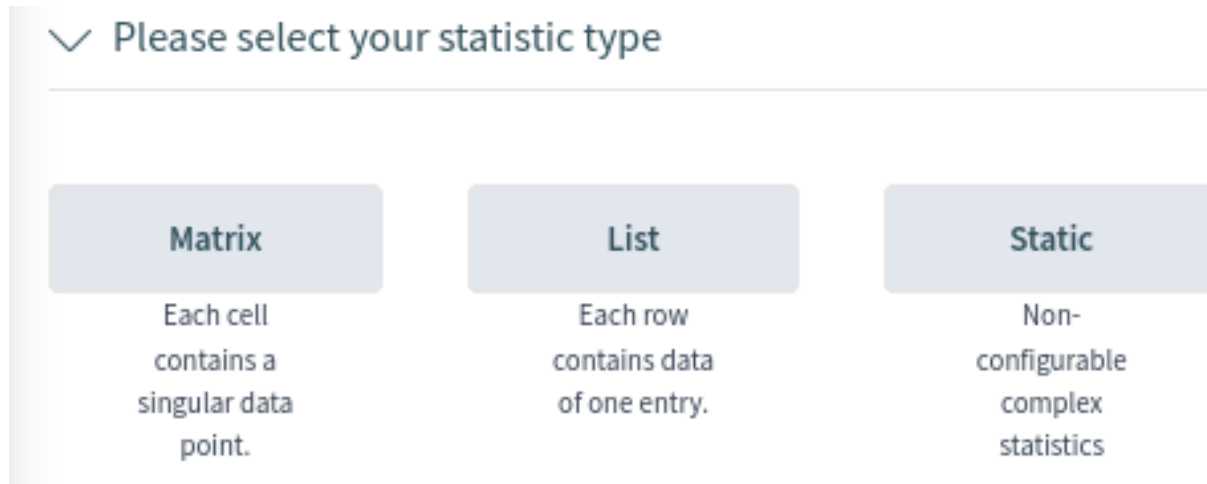
Fig. 131: Statistic Type Selection

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.

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 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 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.

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.

Fig. 132: General Statistic Information

Fig. 133: Configure X-Axis

Fig. 134: Configure Y-Axis

Fig. 135: Add Filters

Preview Statistic

Preview Type   Print

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

Number	Ticket#	Age	Title	
1	2023080710000182	0 h 18 m	Etiam viverra dignissim ligula	2023
2	2023072610000412	12 d 20 h	Vestibulum pretium dolor	2023
3	2023072610000421	12 d 20 h	Nullam eget justo mi	2023
4	2023072610000403	12 d 20 h	Donec tortor augue	2023
5	2023072610000396	12 d 20 h	Mauris id blandit justo, ut cursus ligula	2023
6	2023072610000387	12 d 20 h	Donec id euismod lorem	2023
7	2023072610000378	12 d 20 h	Nunc gravida?	2023

Fig. 136: Preview 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. Review the settings and change them in the new screen if needed.

3. Click on the *Run Statistic* button.

To delete a statistic:

1. Click on the trash icon in the *Delete* column.

2. Click on the *Yes* button in the confirmation dialog.

Ticket Attributes for Statistics

The following ticket attributes can be included in statistics using the *X-Axis* field, if *Lists* statistics are selected.

See also:

Dynamic fields for *Ticket* object are also listed here. The list of dynamic fields is different in each system and can be reviewed in the *Dynamic Fields* module of the administrator interface.

Accounted time
    Accumulated time units of the time units stored in the articles.

Age
    The relative time since ticket creation and now.

Agent/Owner
    The owner agent of the ticket.

Close Time
    The absolute date and time with timezone when the ticket was closed. This field is empty for open tickets.

Created
    The absolute date and time with timezone when the ticket was created.

Customer ID
    The customer of the customer user of the ticket.

Customer User
    The login name of the customer user of the ticket.

EscalationDestinationDate
　　The absolute date and time with timezone when the ticket is escalated.

EscalationDestinationIn
　　The relative time from the current time to the time of escalation.

EscalationResponseTime
　　Unix timestamp of response time escalation.

EscalationSolutionTime
　　Unix timestamp of solution time escalation.

EscalationTime
　　The total time in seconds until escalation of nearest escalation time type: response, update or solution time.

EscalationTimeWorkingTime
　　The time in seconds within the defined working time or service time until an escalation.

EscalationUpdateTime
　　Unix timestamp of update time escalation.

First Lock
　　The absolute date and time with timezone when the ticket was locked first. This field is empty for tickets, that are not locked yet.

FirstResponse
　　The timestamp of first response.

FirstResponseDiffInMin
　　The difference in minutes between the specified response time and the actual response time.

　　This time is suitable to get an overview about the past and shown for open and closed tickets.

FirstResponseInMin
　　The time in minutes from ticket creation to first response (based on working time) only if first response escalation time is set.

　　This time is suitable to get an overview about the past and shown for open and closed tickets.

FirstResponseTime
　　The total time in seconds until the first response time escalation.

　　This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

FirstResponseTimeDestinationDate
　　The absolute date of a first response time escalation.

　　This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

FirstResponseTimeDestinationTime
　　The escalation time as Unix timestamp.

　　This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

FirstResponseTimeEscalation
　　Indicates whether the ticket has escalated or not.

FirstResponseTimeNotification
　　Indicates whether the defined escalation notification time is activated or not.

FirstResponseTimeWorkingTime

The time in seconds within the defined working time or service time until an escalation of a first response.

This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

Last Changed

The absolute date and time with timezone when the ticket was changed.

Lock

The lock state of the ticket.

Number

An auto-increment integer number in the output to show the line numbers.

Number of Articles

The number of articles in the ticket.

Priority

The priority of the ticket.

Queue

The queue in which the ticket is located.

RealTillTimeNotUsed

Unix timestamp of pending time.

Responsible

The responsible agent of the ticket.

Service

The service of the ticket. If no service is assigned, this field is empty.

SLA

The SLA of the ticket. If no SLA is assigned, this field is empty.

SLAID

The ID of the SLA of the ticket. If no SLA is assigned, this field is empty.

SolutionDiffInMin

The difference in minutes between the specified solution time and the actual solution time.

This time is suitable to get an overview about the past and shown for open and closed tickets.

SolutionInMin

The total time in minutes until a solution time escalation.

This time is suitable to get an overview about the past and shown for open and closed tickets.

SolutionTime

The total time in seconds until a solution time escalation.

This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

SolutionTimeDestinationDate

The absolute date of a solution time escalation.

This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

SolutionTimeDestinationTime

The solution time escalation as Unix timestamp.

This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

SolutionTimeEscalation
Indicates whether the ticket has escalated or not.

SolutionTimeNotification
Indicates whether the defined escalation notification time is activated or not.

SolutionTimeWorkingTime
The time in seconds within the defined working time or service time until a solution time escalation.

This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

State
The state of the ticket.

StateType
State type of the ticket.

Ticket#
The ticket number.

Title
The title of the ticket.

Type
The type of the ticket.

UnlockTimeout
Time until the ticket is automatically unlocked.

UntilTime
Total seconds till pending.

UpdateTime
The total time in seconds until an update time escalation.

This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

UpdateTimeDestinationDate
The absolute date of an update time escalation.

This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

UpdateTimeDestinationTime
The update time escalation as Unix timestamp.

This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

UpdateTimeEscalation
Indicates whether the ticket has escalated or not.

UpdateTimeNotification
Indicates whether the defined escalation notification time is activated or not.

UpdateTimeWorkingTime
The time in seconds within the defined working time or service time until an update time escalation.

This time is only suitable to get an overview about the current situation because it is shown only for **open** tickets.

Explanation for Static Statistics

Changes of status in a monthly overview
Monthly overview, which reports status changes per day of a selected month.

Response Statistic
This static type statistic makes it possible to count how many times a response template has been used on a time frame. The result can be filtered by a time period and by queues.

Statistics for Queue Resting Time

You are able to calculate the resting time of tickets for queues with this statistic module. The statistic considering also the close times of tickets. This accounted time will not added to the resting time or the resting time based on working period. The resting time based on working periods will be only displayed if you have configured calendars for your queues.

Available columns are:

- Number: numeration of the ticket list.
- Ticket#: ticket number.
- Ticket ID: internal ID of the ticket.
- Created: ticket creation date.
- Changed: last change date of the ticket.
- Closed: last close date of the ticket.
- Status: current state of the ticket.
- Type: current type of the ticket.
- Queue: current queue based on the history entries.
- Queue join time: date based on history entries (ticket created in this queue, moved into this queue while being open or reopened in this queue).
- Queue left time: date based on history entries (ticket closed in this queue or moved out of this queue while being open). Empty if ticket was still open and in this queue at end of reporting time-frame.
- Resting time (seconds): count of the duration when the ticket stayed in the queue, based on join and left time. Times in which a ticket was closed will not be counted.
- Resting time (HH:MM:SS): count of the duration when the ticket stayed in the queue, formatted as hours, minutes and seconds.
- Resting time (Working hours, seconds): count of the duration when the ticket stayed in the queue based on the queue configured working calendars in the system configuration (this field will be empty if no calendar is configured).
- Resting time (Working hours, HH:MM:SS): formatted count of the duration when the ticket stayed in the queue based on the queue configured working calendars in the system configuration (this field will be empty if no calendar is configured).
- Criticality: current criticality of the ticket.

- Impact: current impact of the ticket.

To use the list object:

1. Create a new *List* statistic.

2. Choose the object `OTRSStatsQueueRestingTime`.

3. Configure the rest of the configuration options according to your wishes.

4. Run the statistic with output print or CSV.

5. All tickets matching the restrictions will be shown. Additional tickets will be shown, if they were created before the beginning of the reporting and were still open during the reporting time frame.

Statistics for Queue Working Time

This statistic is a modified ticket list to calculate the working time per queue. This modified ticket list statistic contains 3 new columns for the X-axis. In general the time for the 3 new columns is calculated on the time where ticket was not in a closed, removed or merged state type.

All queues in the system have the *Time*, *Working Time* and *Effective Time* column for this statistic object.

Example queue *Misc*:

- *Queue Misc Time* contains the time the agent have worked on the ticket.

- *Queue Misc Working Time* contains the time the agent have worked on the ticket based on the working calendars of the queue *Misc*.

- *Queue Misc Effective Time* contains the time the agent set as time units for the ticket while it was in the queue *Misc*. The values are displayed for each agent by first and last name in the same column (comma separated).

To use the list object:

1. Create a new *List* statistic.

2. Choose the object `OTRSStatsQueueWorkingTime`.

3. In the *X-axis* section, select the columns for the queue you like to display the working time or time.

4. Set all other restrictions and sort options you need for the statistic to complete the configuration.

5. Generate your statistic.

Statistics for Service Management

The following metrics can be added to the system as new statistics:

```
Total number of all tickets ever created per Ticket-Type and Priority
Total number of all tickets ever created per Ticket-Type and State
Total number of all tickets ever created per Ticket-Type and Queue
Total number of all tickets ever created per Ticket-Type and Service
Monthly overview of all tickets created in the last month per Ticket-Type
Monthly overview of all tickets created in the last month per Priority
Monthly overview of all tickets created in the last month per State
Monthly overview of all tickets created in the last month per Queue
Monthly overview of all tickets created in the last month per Service
Number of tickets created in a specific time period per Ticket-Type and Priority
Number of tickets created in a specific time period per Ticket-Type and State
```

(continues on next page)

```
Number of tickets created in a specific time period per Ticket-Type and Queue
Number of tickets created in a specific time period per Ticket-Type and Service
Number of currently open tickets per Ticket-Type and Priority
Number of currently open tickets per Ticket-Type and Queue
Number of currently open tickets per Ticket-Type and Service
Total number of all configuration items ever created per Class and State
Monthly overview of all configuration items created in the last month per Class
Monthly overview of all configuration items created in the last month per State
Number of configuration items created in a specific time period per Class and State
First level solution rate for all tickets ever created per Ticket-Type and Priority
First level solution rate for all tickets ever created per Ticket-Type and Queue
First level solution rate for all tickets ever created per Ticket-Type and Service
Monthly overview of first level solution rate per Ticket-Type in the last month
Monthly overview of first level solution rate per Priority in the last month
Monthly overview of first level solution rate per Queue in the last month
Monthly overview of first level solution rate per Service in the last month
First level solution rate for all tickets created in a specific time period per␣
→Ticket-Type and Priority
First level solution rate for all tickets created in a specific time period per␣
→Ticket-Type and Queue
First level solution rate for all tickets created in a specific time period per␣
→Ticket-Type and Service
Average solution time for all tickets ever created per Ticket-Type and Priority
Average solution time for all tickets ever created per Ticket-Type and Queue
Average solution time for all tickets ever created per Ticket-Type and Service
Monthly overview of the average solution time per Ticket-Type in the last month
Monthly overview of the average solution time per Priority in the last month
Monthly overview of the average solution time per Queue in the last month
Monthly overview of the average solution time per Service in the last month
Average solution time of tickets created in the last month per Ticket-Type and␣
→Priority
Average solution time of tickets created in the last month per Ticket-Type and Queue
Average solution time of tickets created in the last month per Ticket-Type and Service
```

Statistics for Appointment

You can set up new list statistics using the `AppointmentList` statistic back end to create statistics about the stored appointments in your **OTRS** system. It is a regular statistic (e.g. like the `TicketList` statistic), which means you can configure the X-axis and Y-axis to your needs. A lot of the appointment attributes are even available as restrictions.

Some of the selectable attributes are calculated on-the-fly:

- Age

- Days

- Hours

The filter *Period* could be used to combine start and end time of an appointment with the OR operator instead of AND operator. For example the filter *Start Time* with a relative time period for the current one month will not show appointments starting one month before but ends in the current month. To see such appointments, you have to use the *Period* filter. Appointments which are overlapping are split.

For each linked ticket one row is added to the statistic output. For example an appointment is linked with two tickets, the appointment is shown twice.

Note: Please be careful if you are using teams and resources to filter the appointments. Unfortunately it is not possible to filter for teams and resources on database level, meaning the time which is needed to create a statistic could be higher than usual.

1.15 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.

1.15.1 Calendar Widgets

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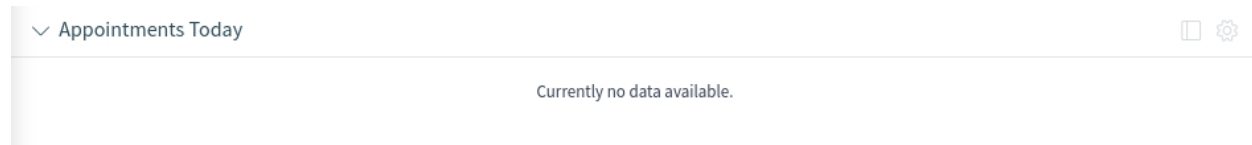

Fig. 137: No Calendars Found

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 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.

Resource Calendar
> While it is possible to assign resources to an appointment in any appointment widget, this widget is designed exclusively for allocating resources to appointments.
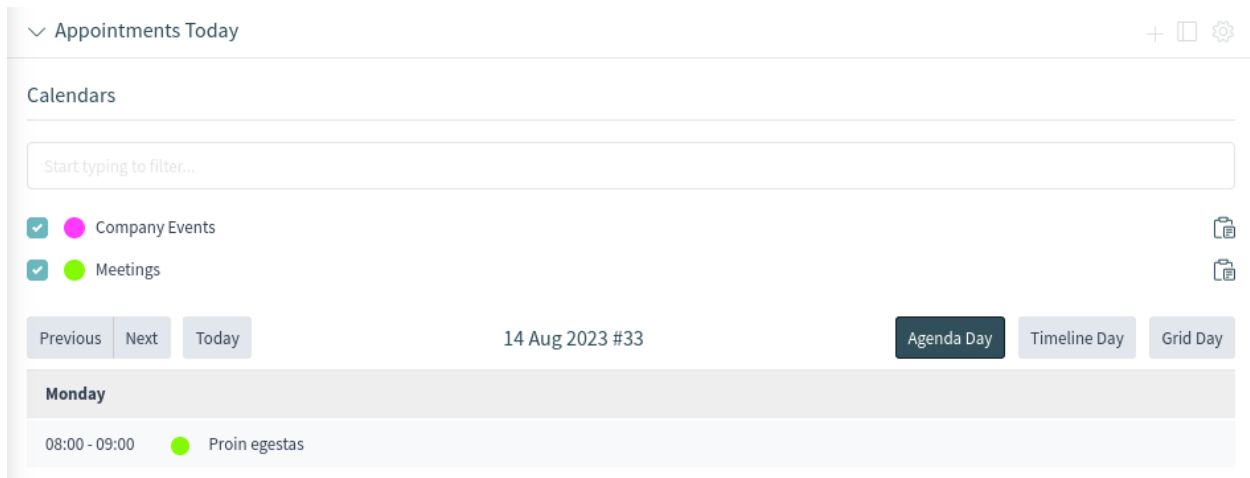
Fig. 138: Appointments Today Widget

This widget looks very much like a regular appointments widget. It has a filter for teams in the widget configuration and a list of agents for that team (available only in timeline views). By choosing a team in the widget configuration, you will be presented with all appointments assigned to the team. A section *Timeline View* "*Custom*" *Settings* is added to all appointment widgets as a new customizable view.

Once you have both teams and their agents set up, you can proceed to a calendar overview and start assigning appointments to teams and agents. Simply add or edit an appointment, and choose both team and agent from the lists under resource. You can do this via any appointment widget, as appointment edit dialog is the same for all of them.

By simply dragging an appointment to a row line with an agent's name in timeline view, it is possible to assign an appointment to this resource. If an appointment does not have an agent assigned to it, it will appear in the *Unassigned* row of the widget. An appointment with multiple assigned agents will be displayed in each row of assigned agents. Dragging one instance of this appointment will move all them in the same fashion.

By editing the settings of the *Resource Calendar* widget via gear icon in top right corner, you can choose which team agents are displayed within the widget and you can customize the *Timeline View* "*Custom*" *Settings*.

1.15.2 Resource Calendar Widget Configuration

The widget configuration can be accessed via the gear icon in top right corner of any calendar widget.

Some of these settings have been applied also to the regular calendar overview.

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

Fig. 139: Appointments This Week Widget

Fig. 140: Appointments This Month Widget

Fig. 141: Resource Calendar Widget

Fig. 142: Resource Calendar Settings

General

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.

Grid View *
> Here you can select the time period for the grid view.

Timeline View *
> Here you can select the time period for the timeline view. You can also define a custom timeline view here. If you have selected the *Custom* timeline view, you can configure the settings for this timeline in the *Timeline View* "*Custom*" *Settings* section below.

Agenda View *
> Here you can select the time period for the agenda view.

Show weekends *
> Select whether the weekends should be displayed or not.

Show Resource Information *
> Show additional resource information next to the agent name in the *Resource Calendar* widget. You can use OTRS smart tags related to agents, e.g. `<OTRS_AGENT_X>`. You can even access agent preferences.

> **See also:**

> The additional resource information can be added in setting `AppointmentCalendar::CustomTimeline::ResourceInformation` in the system configuration.

Resources

Teams *
> This setting is user and team specific. If you have defined an agent filter in this way, the widget will filter the appointments to the selected teams and agents.

Timeline View "**Custom**" **Settings**

Shown weeks *
> Select how many weeks should be displayed in the *Custom* timeline view.

Start time *
> Select the start time for the *Custom* timeline view. The default *00:00* means the start time will be at the very beginning of the day (midnight).

End time *
> Select the end time for the *Custom* timeline view. The default *24:00* means the end time will be at the very end of the day (midnight).

Slot duration *
> Select the time slot duration for the *Custom* timeline view. The default *2 Hours* means that each shown time slot has the duration of two hours (e.g. 12 slots are shown for a day 00:00 - 24:00).

Slot width *
> Select the time slot width for the *Custom* timeline view. The default *100 Pixel* means that each shown time slot has a width of 100 pixel.

In *Custom* timeline view, it is possible to show more information on each shown appointment. For this, you have to configure the setting *Additional Description* in the Calendars screen of the administrator interface.

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.

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.

1.15.3 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.

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`.

Visibility *
Where should the appointment be displayed. Possible values:

> **External Restricted**
> The customer user needs to login in the external interface to see the appointment.
>
> **Internal**
> This is the default selection for new appointments that do not show any data of the associated tickets to the customer user. In existing appointments where no visibility value has set is considered also internal and the customer user cannot view the appointment.
>
> **Public**
> Every visitor of the external interface can see the appointment.

Team
You can assign multiple teams and agents to a single appointment, but you must always choose a team first.

Agent
Resulting list of agents is an aggregate of all selected teams, without any duplicates. Choosing an agent from the list is also optional, so you can leave an appointment assigned only to a team.

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.

Add Appointment ⤢ ✕

💡 Hint: All fields marked with an asterisk (*) are mandatory. ✕

∨ Basic Information

* Calendar

[Please select a calendar   ∨]

* Title

[Please enter a title   ]

Description

[Please enter a description   ]

Location

[Please enter a location   ] ⦿

* Visibility

[Internal   ∨]

∨ Resource

Team

[Please select team(s)   ∨]

Agent

[Please select agent(s)   ∨]

∨ Date & Time

☐ All day

* Start Date

[📅]

* End Date

[📅]

* Repeat

[Never   ∨]

∨ Notification

* Notification

[No notification   ∨]

∨ Linked Tickets

[Add Ticket]

[Cancel] [Add]

Fig. 143: Add Appointment Dialog

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.

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.

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.

Fig. 144: Repeating Appointments

1.15.4 Calendar Subscriptions

It is possible to use a filter in calendar subscription feature.

To use the calendar subscription feature:

1. Click on the gear icon next to a calendar in left sidebar.

2. Select the teams and resources you want to filter for.

3. Click on the *Copy* button. Now the URL is copied to the clipboard.

4. Go to your calendar application and paste the URL.

The dialog is kept open after clicking on *Copy* button, to be able to change the selected teams and resources.

1.16 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*.
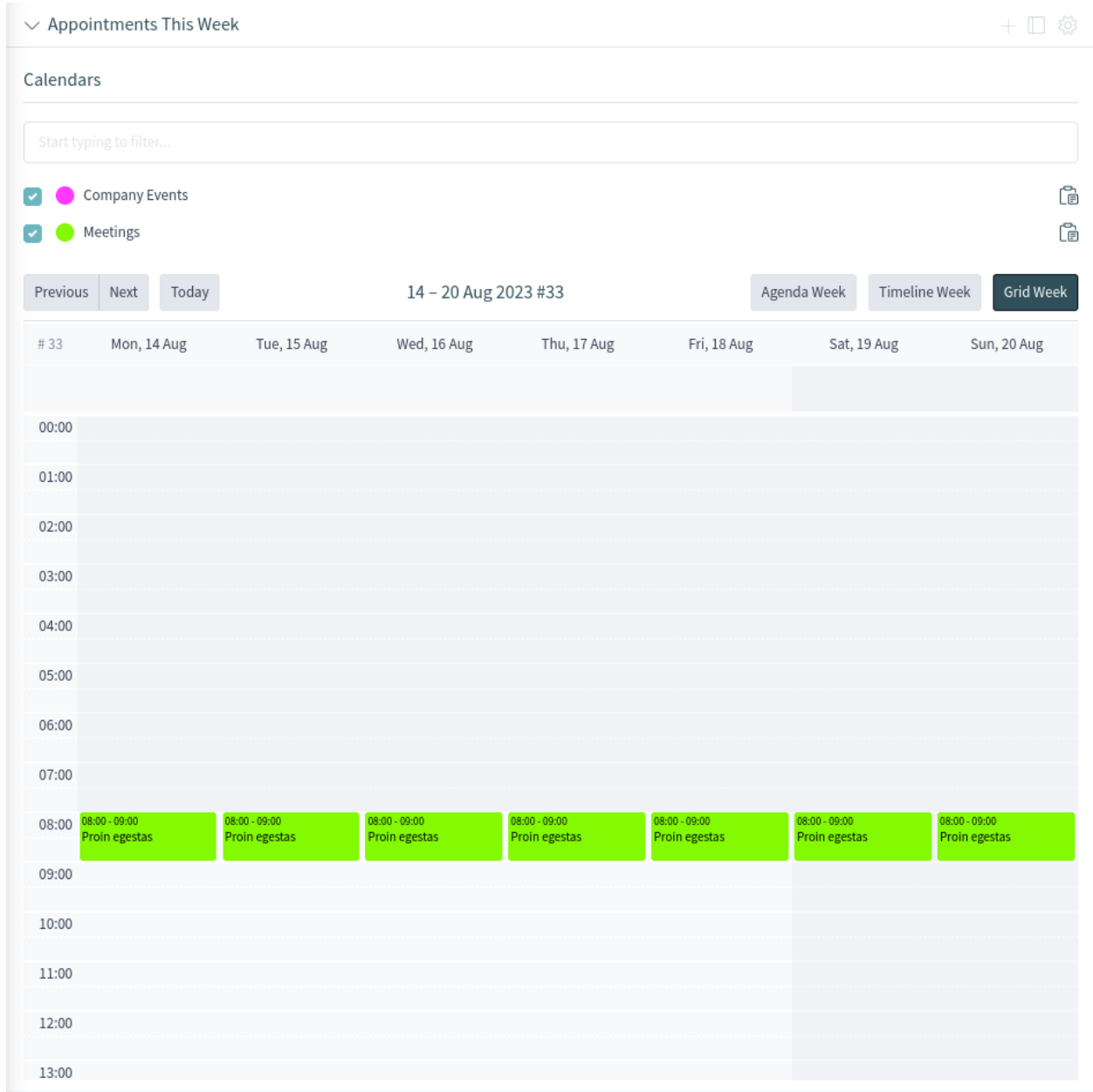
Fig. 145: Repeating Appointments Overview

Fig. 146: Repeating Appointments Details
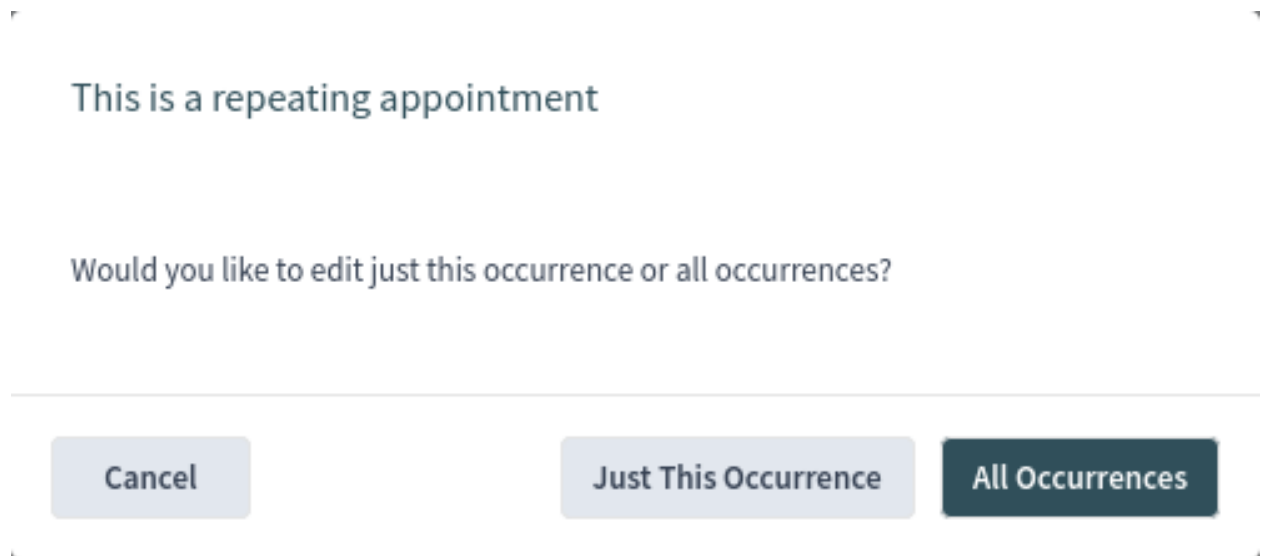
Fig. 147: Edit Repeating Appointment
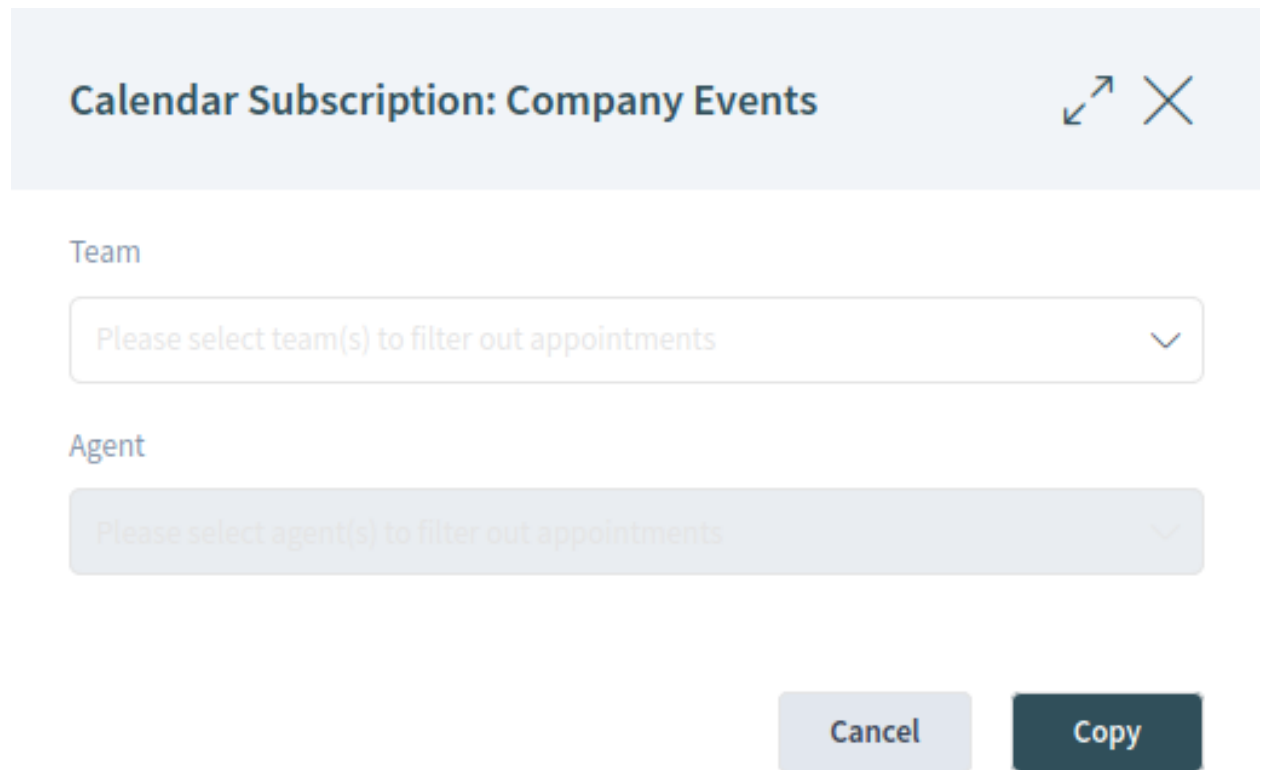
Fig. 148: Calendar Subscription Action

1.16.1 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 in the *Dashboard* shows the names of users who are currently logged in. Users who are not logged in do not appear in this widget. A third screen shows users that are out of office.
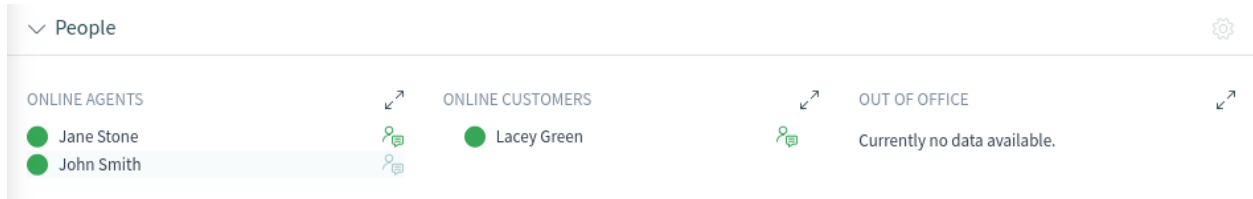
Fig. 149: People Widget

A colored circle icon next to a user's name indicates the status of chat availability.

Green circle
    The user is available for internal or external chats.

Yellow circle
    The user is away and the idle time defined in the system configuration has reached.

Red circle
    The user is set as unavailable for chats. This can be the case when an agent has disabled the chat availability in the *Personalization* menu or if the chat has been deactivated in the system configuration.

An additional icon is displayed next to the name for starting a direct chat.

Note: This widget works differently than the *People* widget in a ticket detail view, which shows involved agents regardless of their chat status.

1.16.2 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.
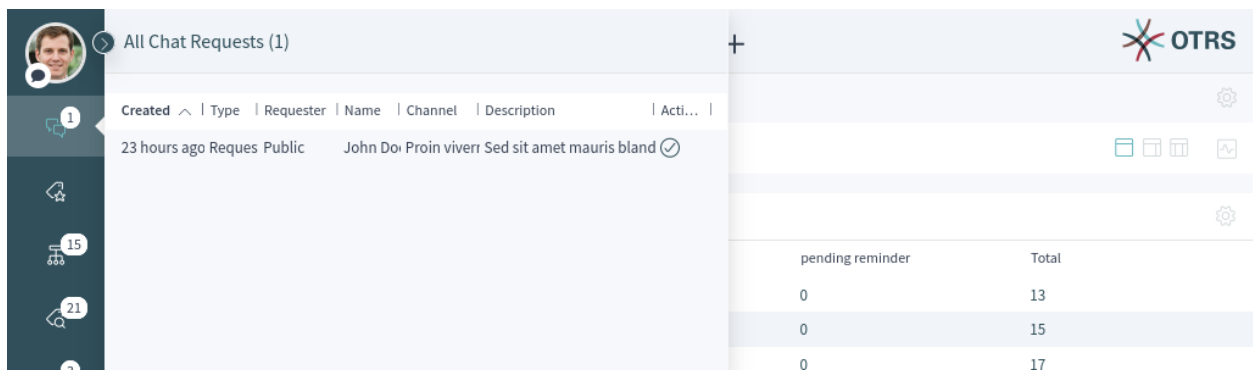
Fig. 150: Chat Request List

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

1.16.3 Start New Chat

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

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.
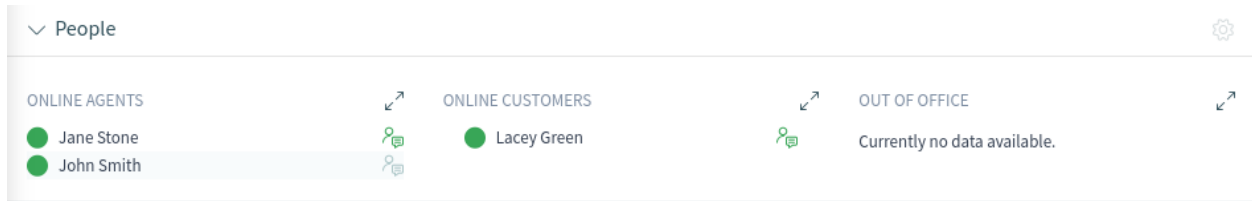
Fig. 151: Available Agents

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.
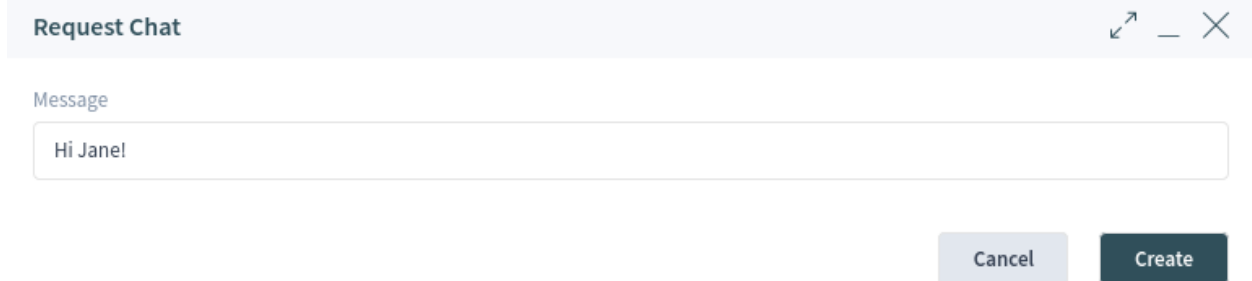
Fig. 152: Request Chat Dialog

4. After the chat request has been sent to the other agent, a chat indicator will appear 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.

Accept chat request

∨ Chat Protocol

Hi Jane!
08/08/2023 13:45:43

John Smith

Cancel   Accept
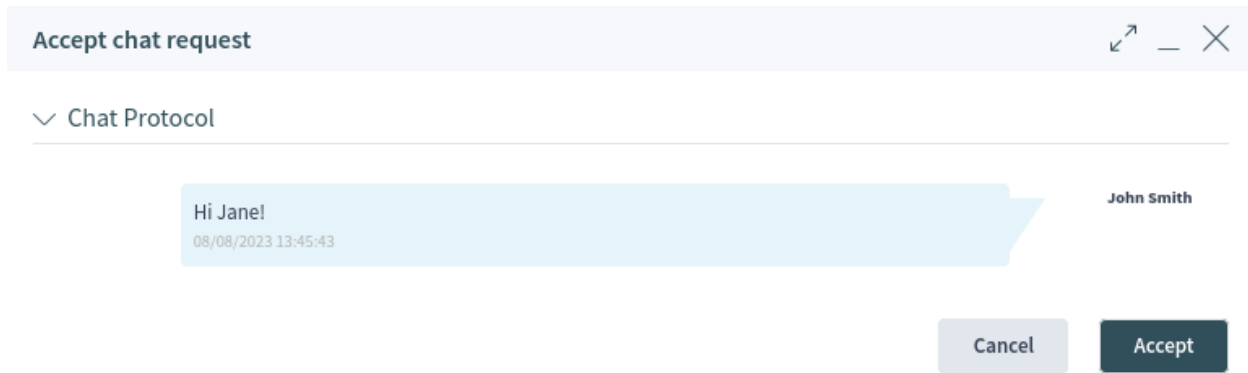
Fig. 153: Accept Chat Request Dialog

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 user's 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 chat 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.
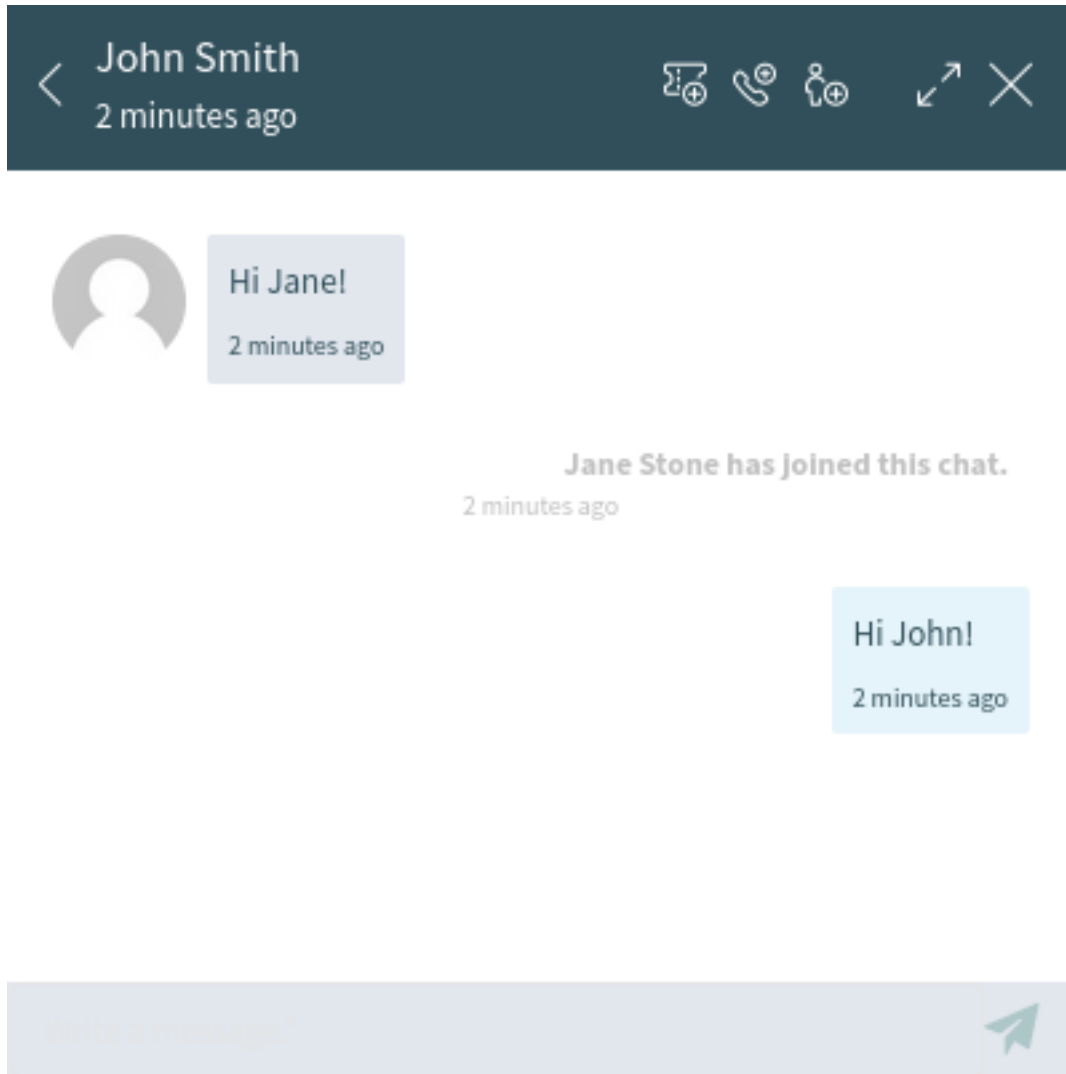
Fig. 154: Agent to Agent Chat
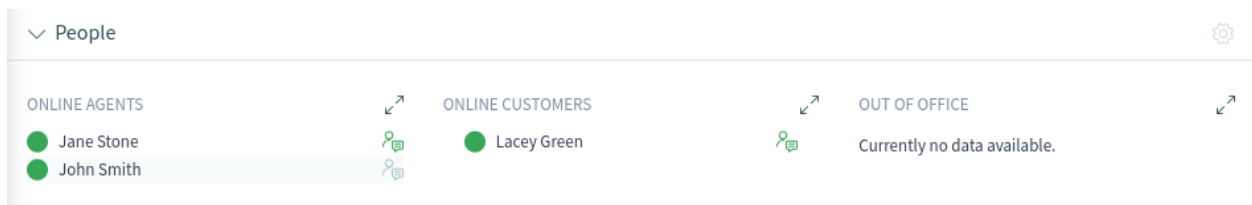
Fig. 155: Available Customer Users

Request Chat ⤢ ─ ✕

Message

Hi Jane!

Cancel   **Create**

Fig. 156: Request Chat Dialog

John Smith

Nunc eget ante gravida, sodales erat a, sollicitudin le…

Fig. 157: Chat Request on External Interface

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.

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.
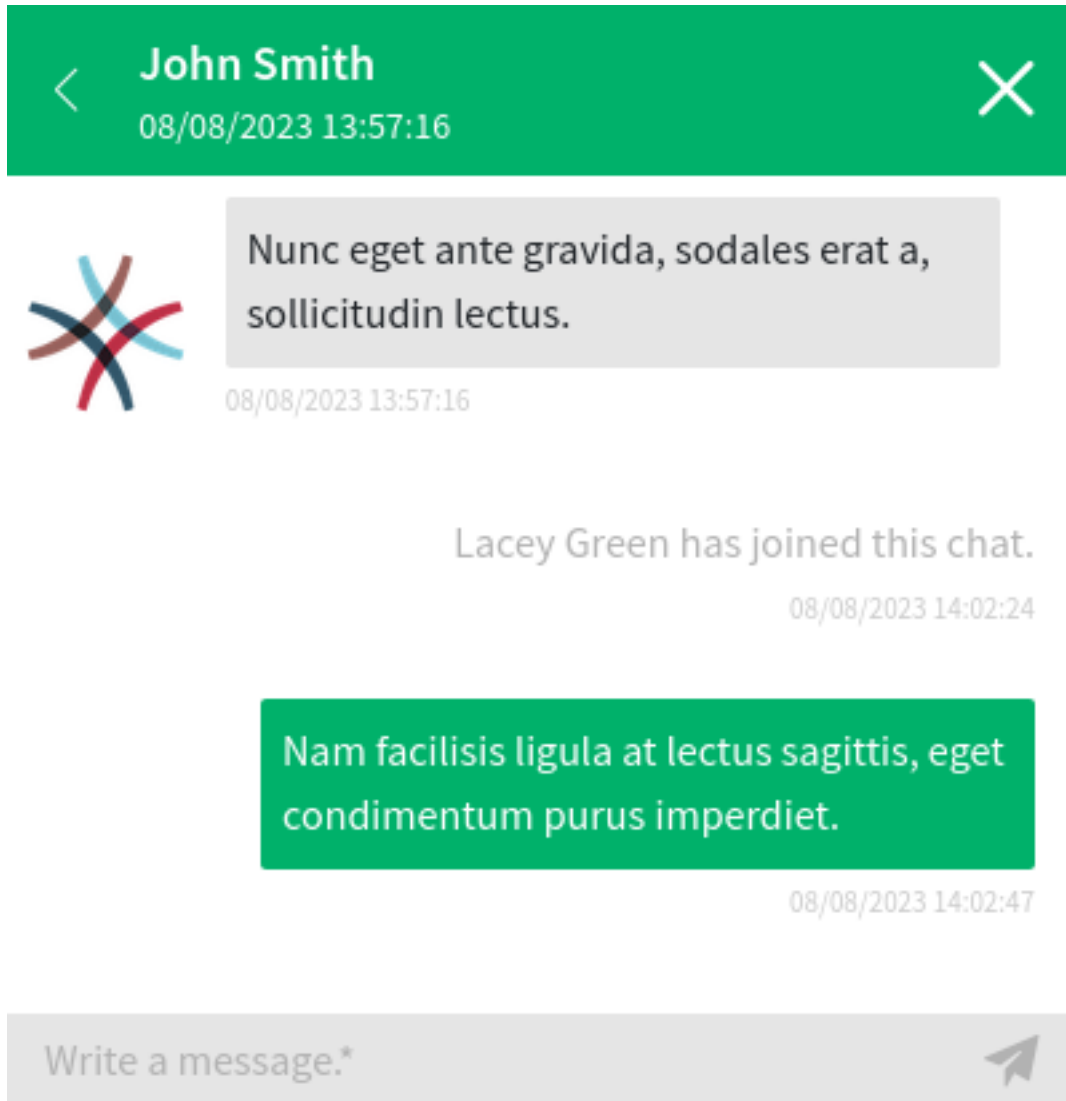
Fig. 158: Agent to Customer User Chat

Fig. 159: Save the Conversation on External Interface
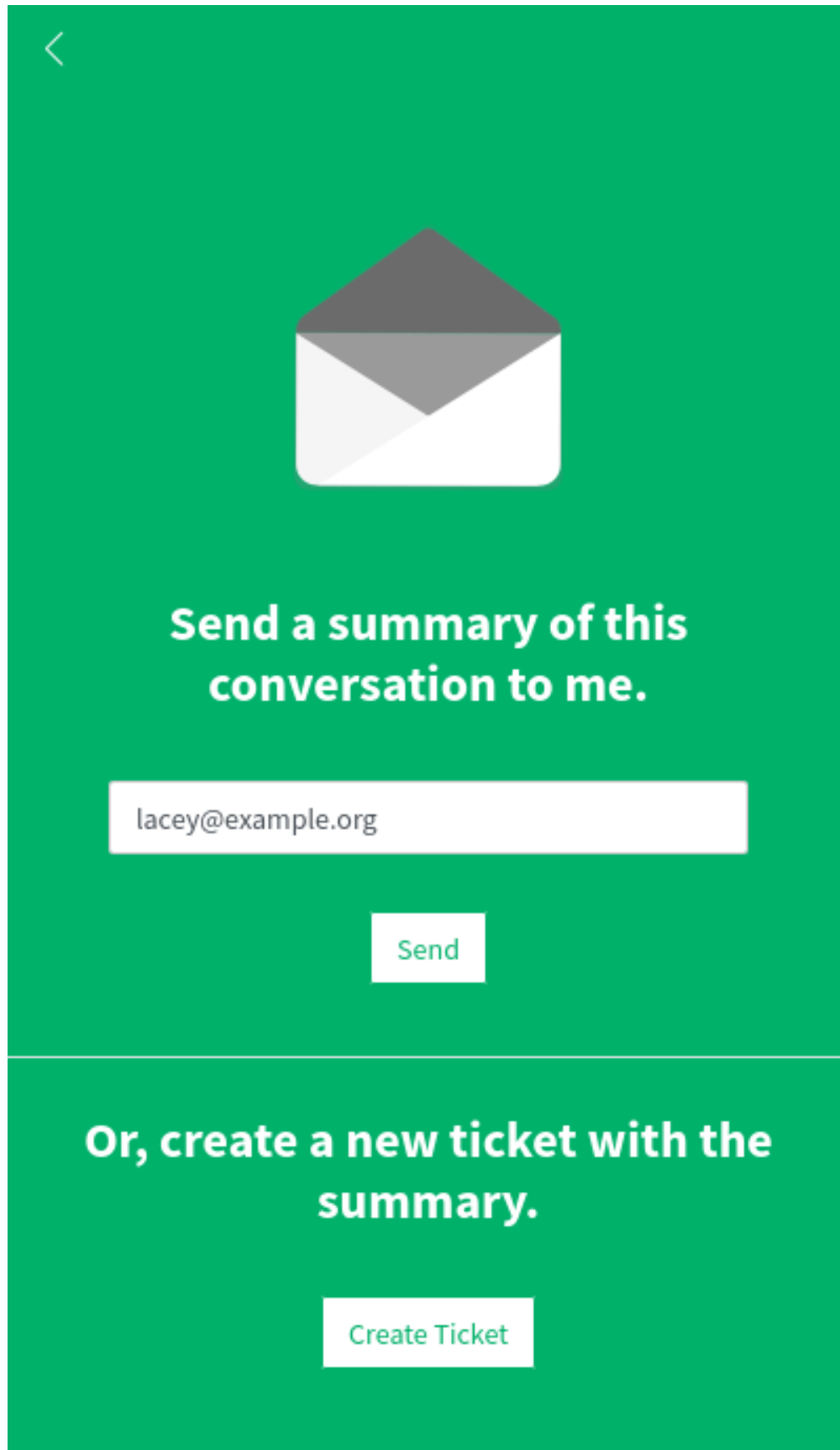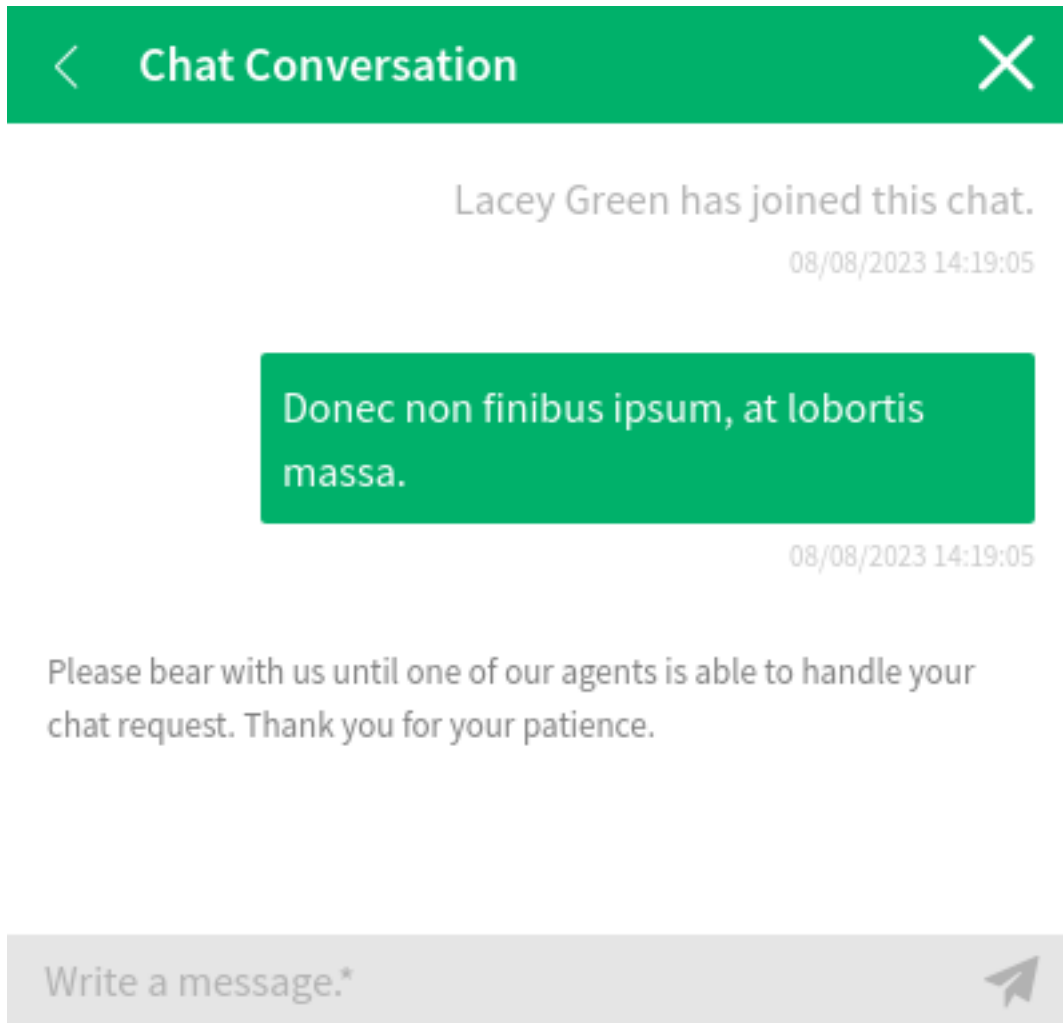
Fig. 160: Start Chat Window
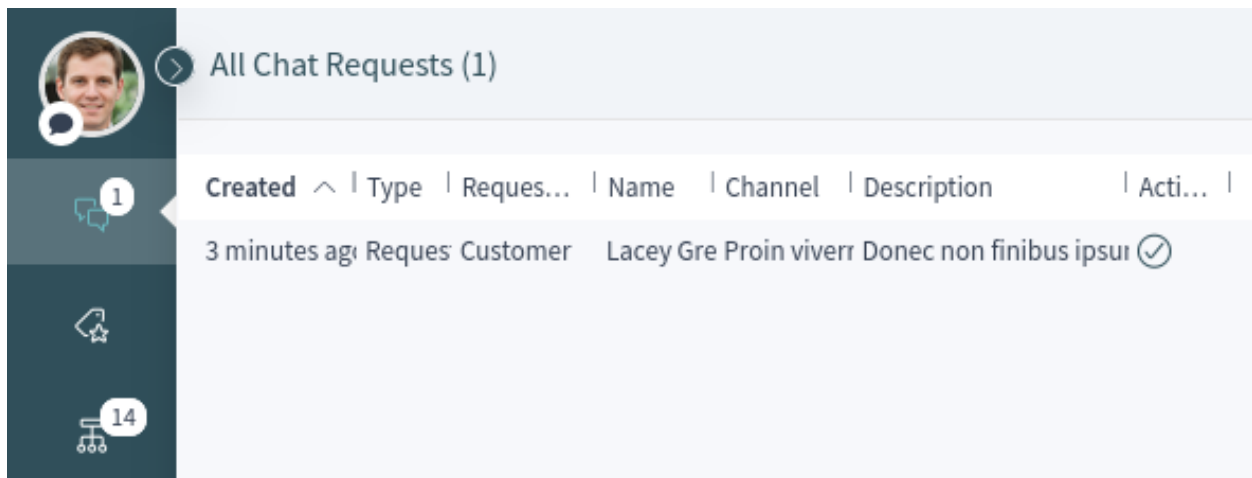
Fig. 161: General Chat Requests From Customers Widget
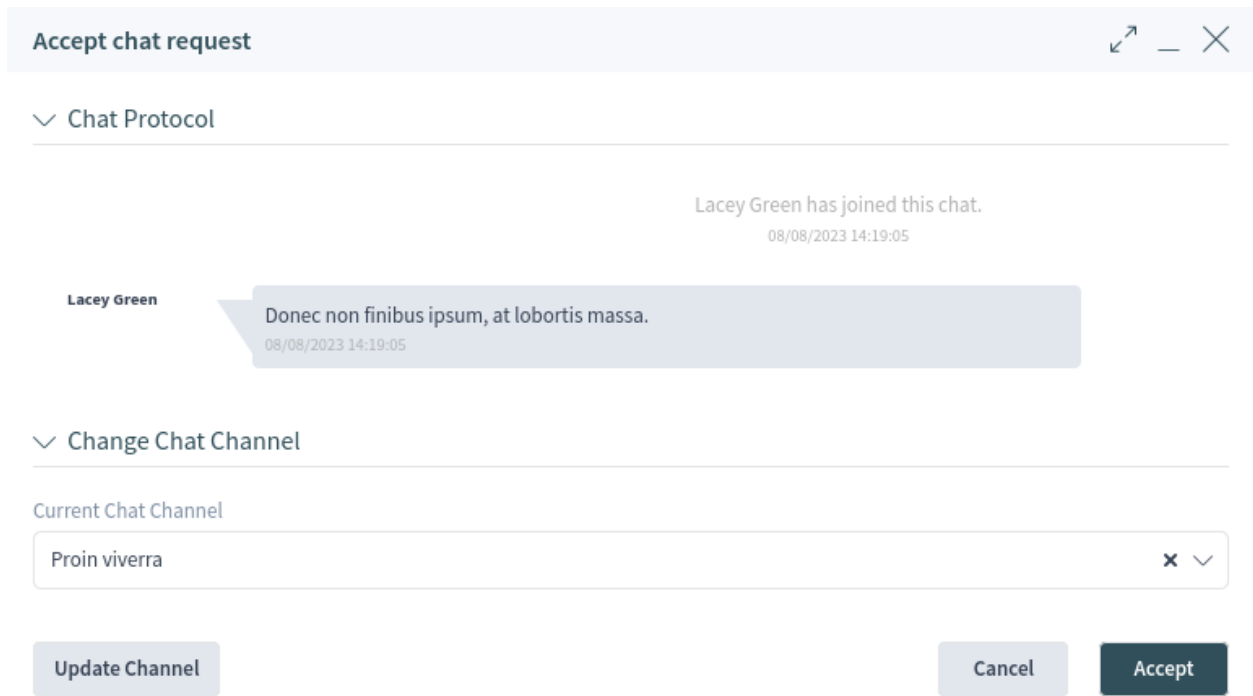
Fig. 162: Chat Preview Dialog
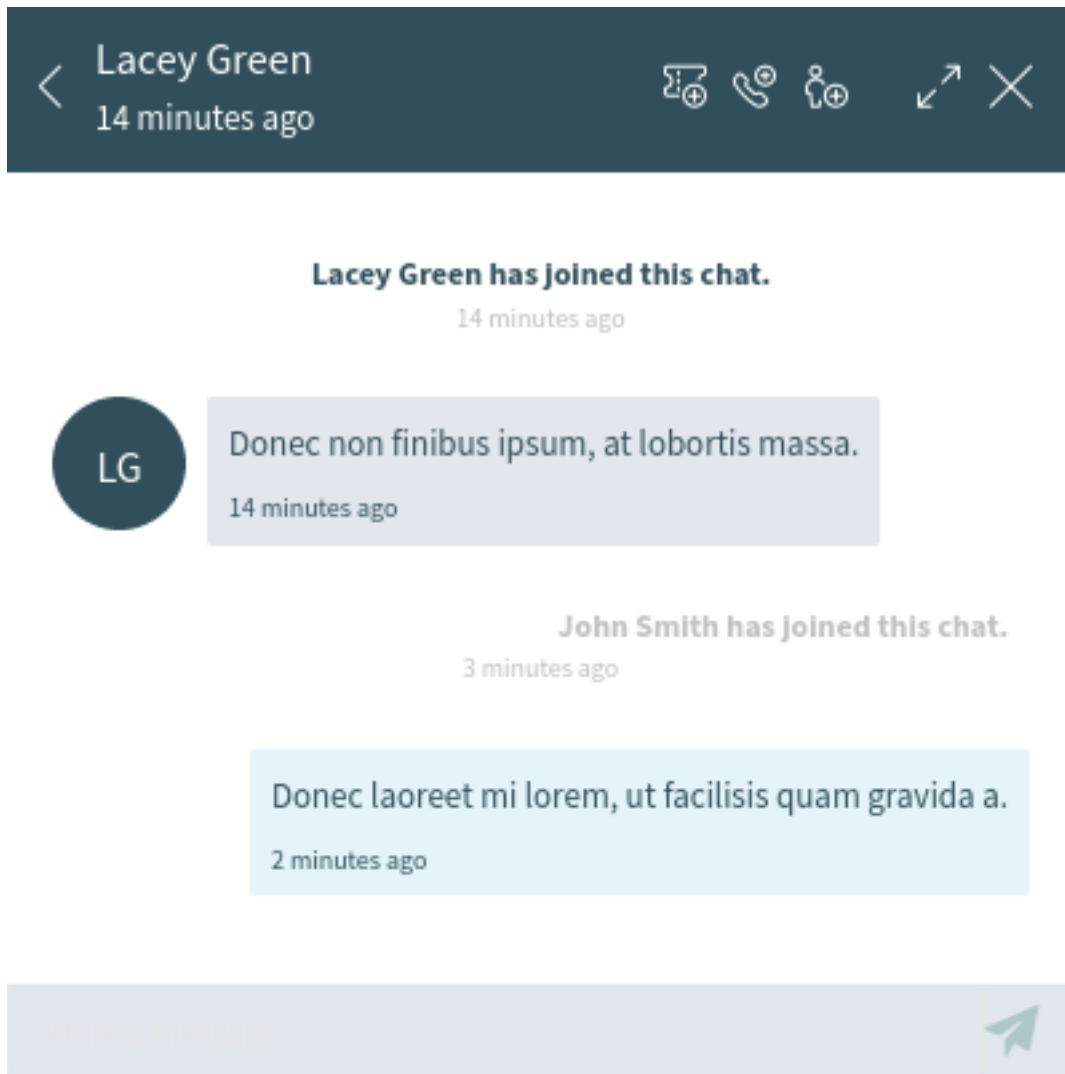
Fig. 163: Customer User to Agent Response
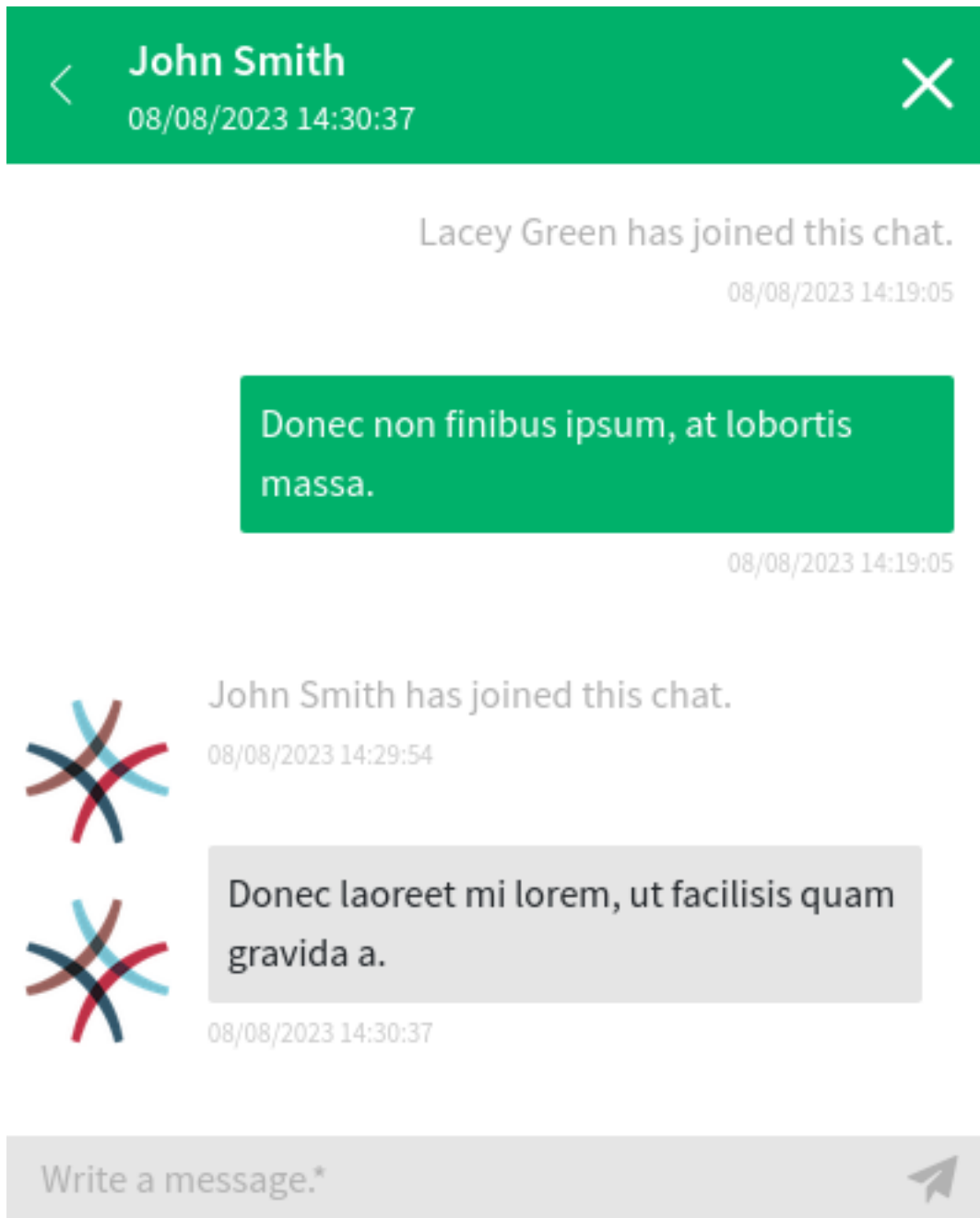
Fig. 164: Customer User Chat
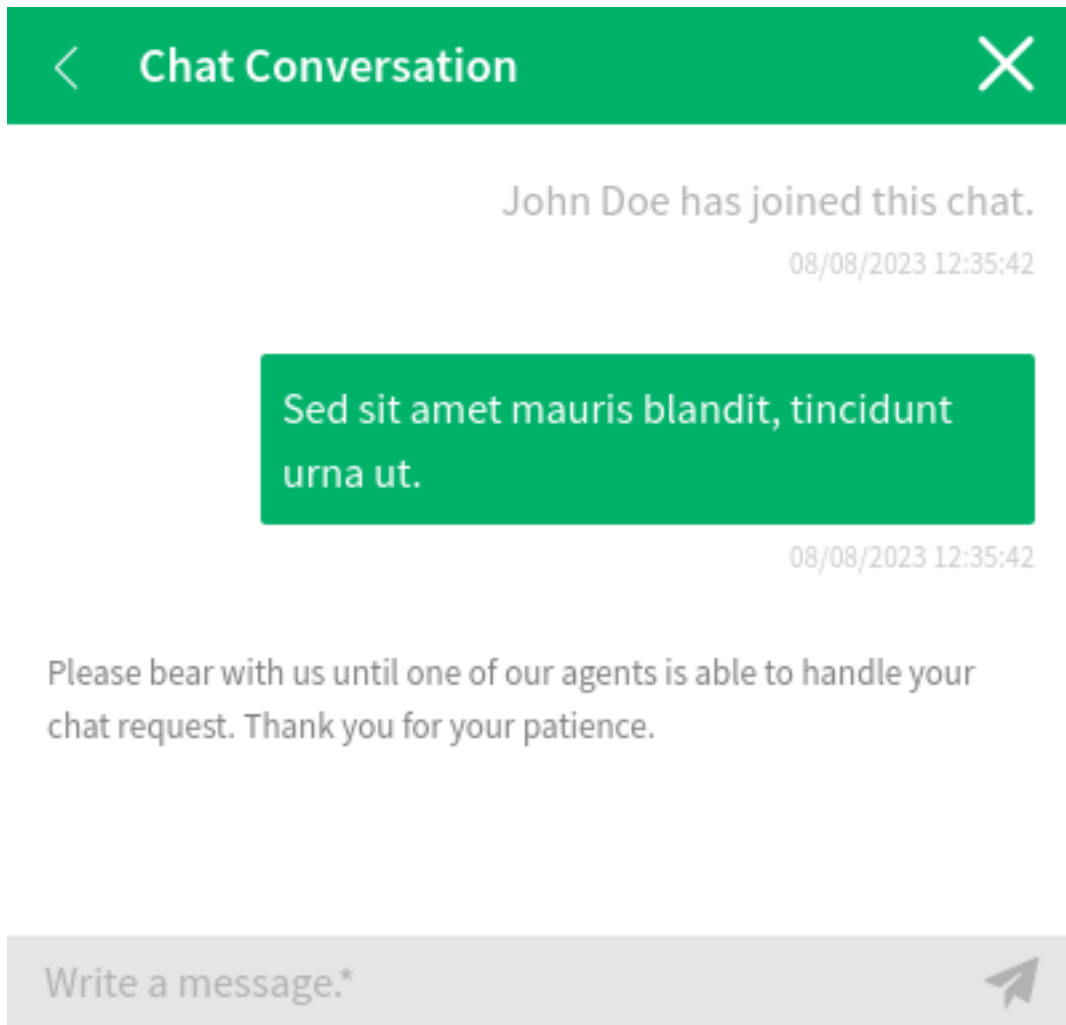
Fig. 165: Start Chat Window

1.16.4 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.
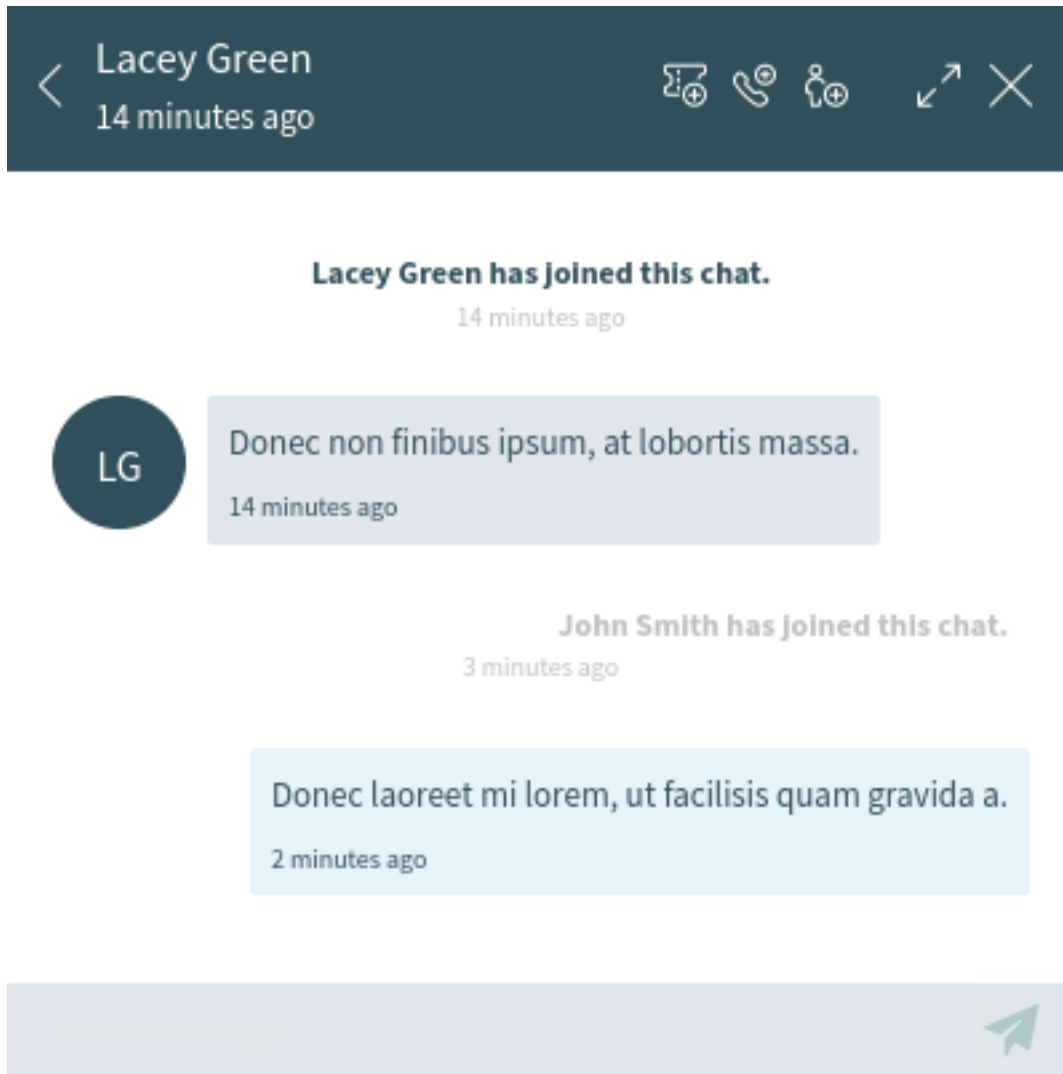
Fig. 166: Chat Widget

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

Fig. 167: Append to 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.

1.17 Search

Use this menu item to search for something. The document search feature is available if you click on the magnification glass icon in the header bar.

Fig. 168: Search Dialog

The system remembers the previous searches, and they are displayed below the input field in the *Recent Searches* section. Enter a search term and you will get a search results preview in a few seconds. Selecting a previous search opens the *Search Results* screen immediately.

Fig. 169: Search Results Preview Screen

The results of the search are first presented as preview in an overlay weighted by the relevance of the search term. Clicking on a single entry in the list opens the detail view of the corresponding business object. The headlines of the section are also clickable and show the search results for the corresponding business object.

Click on the *Show All* button to display all results of the search. After clicking the *Show All* button in the overlay the results are presented in separate widgets per business object type. The *Search Results* screen is similar to the *Personal Dashboard* view.

Alternatively you can press the *Enter* key on your keyboard or click on the magnification glass icon to access the *Search Results* screen.
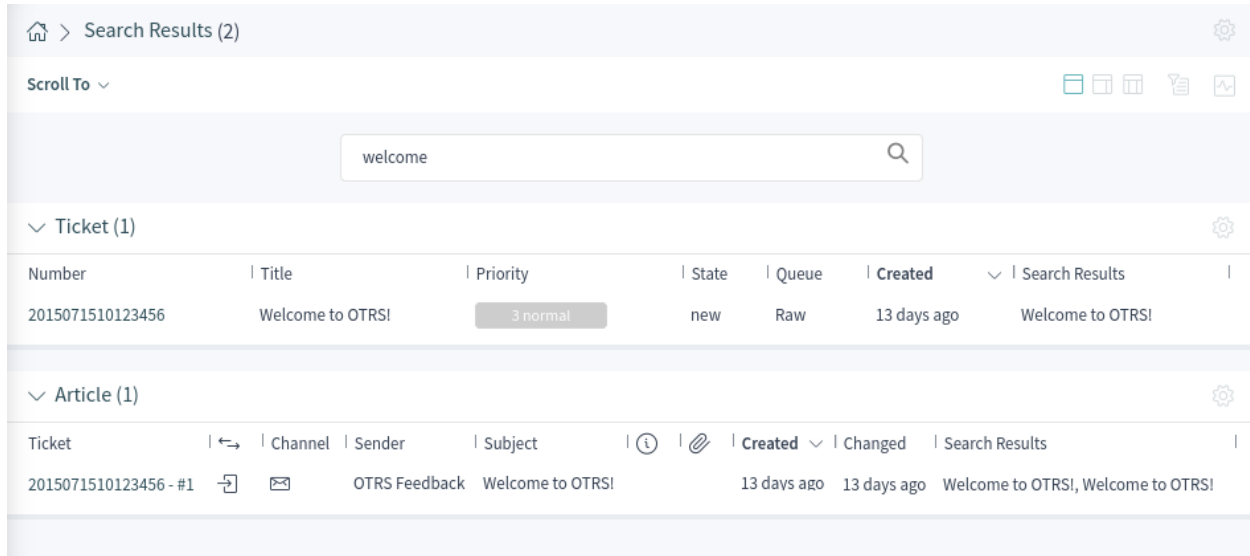

Fig. 170: Search Results Screen

This screen lists all objects that match the search term. The objects are grouped by type. Clicking on an entry opens the corresponding detail view of the business object.

To find the desired object, open the filter section from the breadcrumb bar and use the filters to narrow the results. This section allows you to add fields of business objects, by which the search results list should be filtered. The filters can be saved as presets.

To apply a filter:

1. Open the filter section by clicking the filter icon in the breadcrumb bar.

2. Click on a business object in the *Search Filtering* section.

3. Select a *Field* of the business object.

4. Select an *Operator*. The operator depends on the selected field of the business object.

5. Select or enter a value.

6. Click on the *Submit* button.

The results are now displayed according to the filters specified. In this section it is also possible to add a custom label for the filter.

Several filter conditions can be applied and combined at the same time. To add another filter condition, repeat the steps explained above.

Each filter condition can be edited, disabled, removed or inverted. The inverted filter condition is displayed with red background.

Filter conditions can be saved as preset. The filter preset can be reused at any time. The usage of the filter preset is explained in the *Navigation And Usage* chapter.

The *Search Results* screen and its widgets can be configured as any other screen in **OTRS**.

Fig. 171: Search Filtering Action

1.17.1 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.

1.18 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.

1.18.1 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.

Fig. 172: Account Management Screen
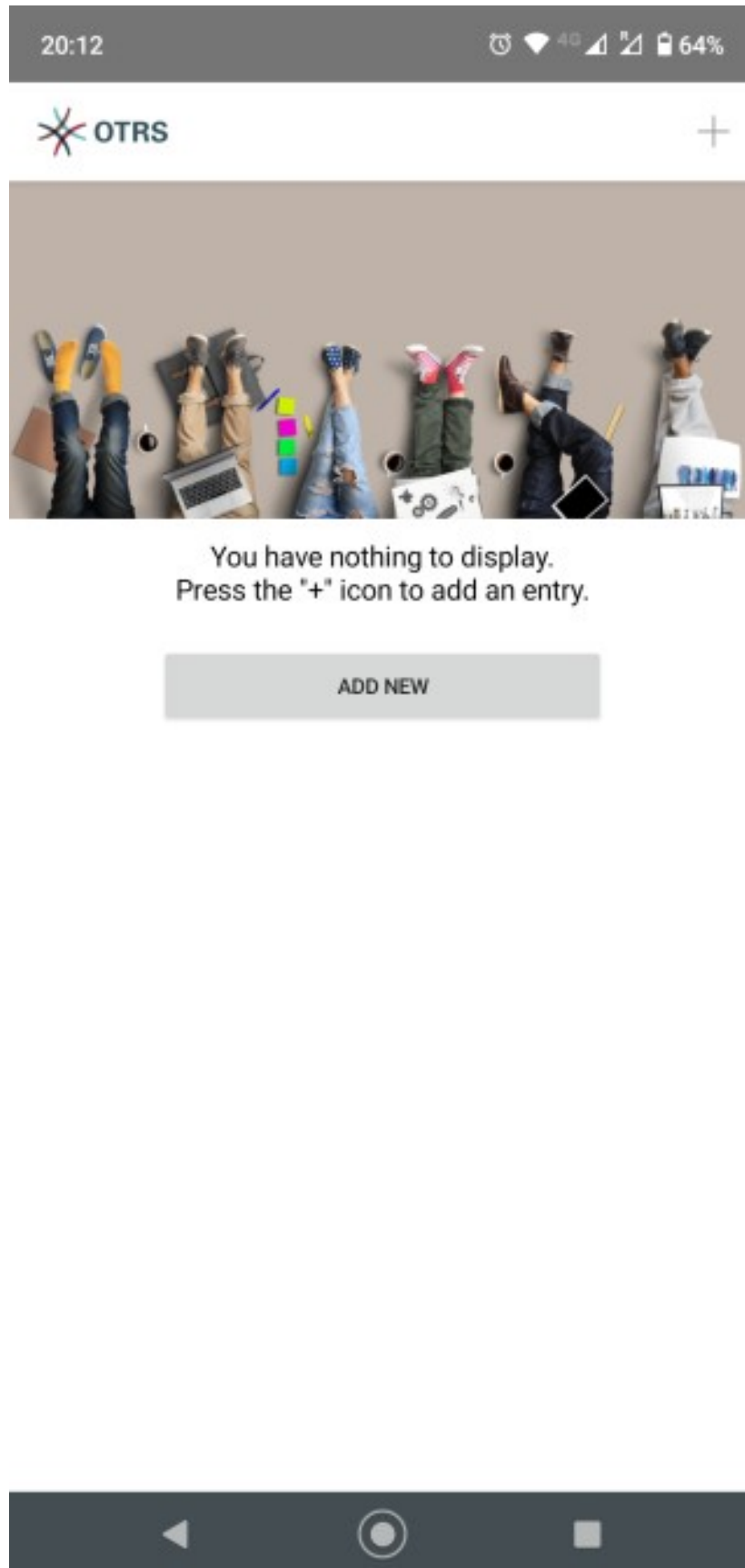
3. Tap the *Save* button.

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:

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.

1.18.2 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.

Note: Single sign-on (SSO) is not supported with the mobile app.

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.
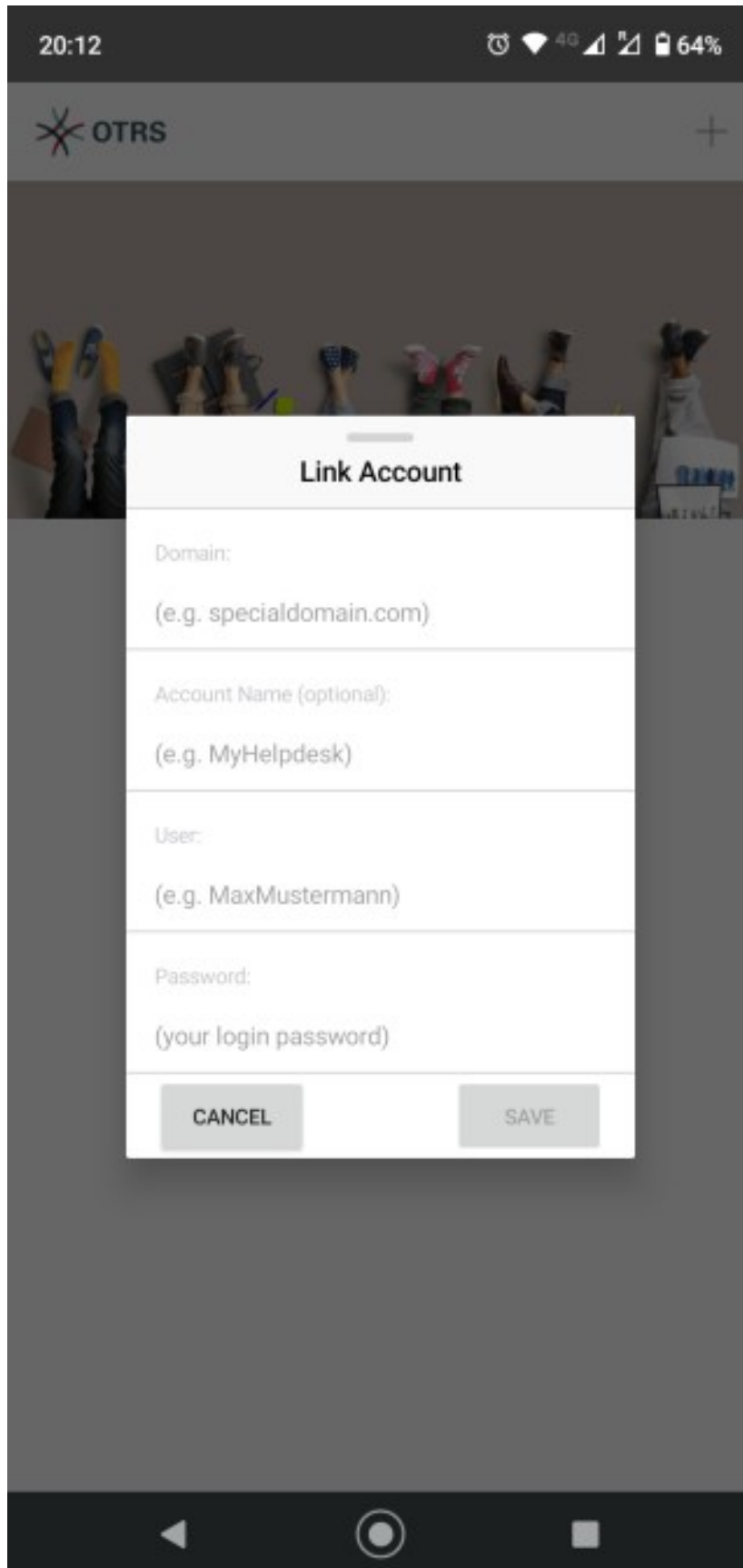
Fig. 173: Link Account Screen

Fig. 174: Edit or Remove Account

Fig. 175: Dashboard on a Mobile Device
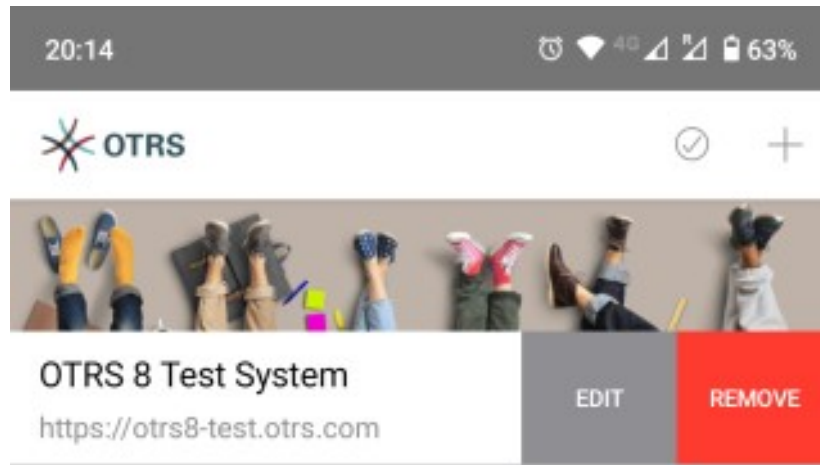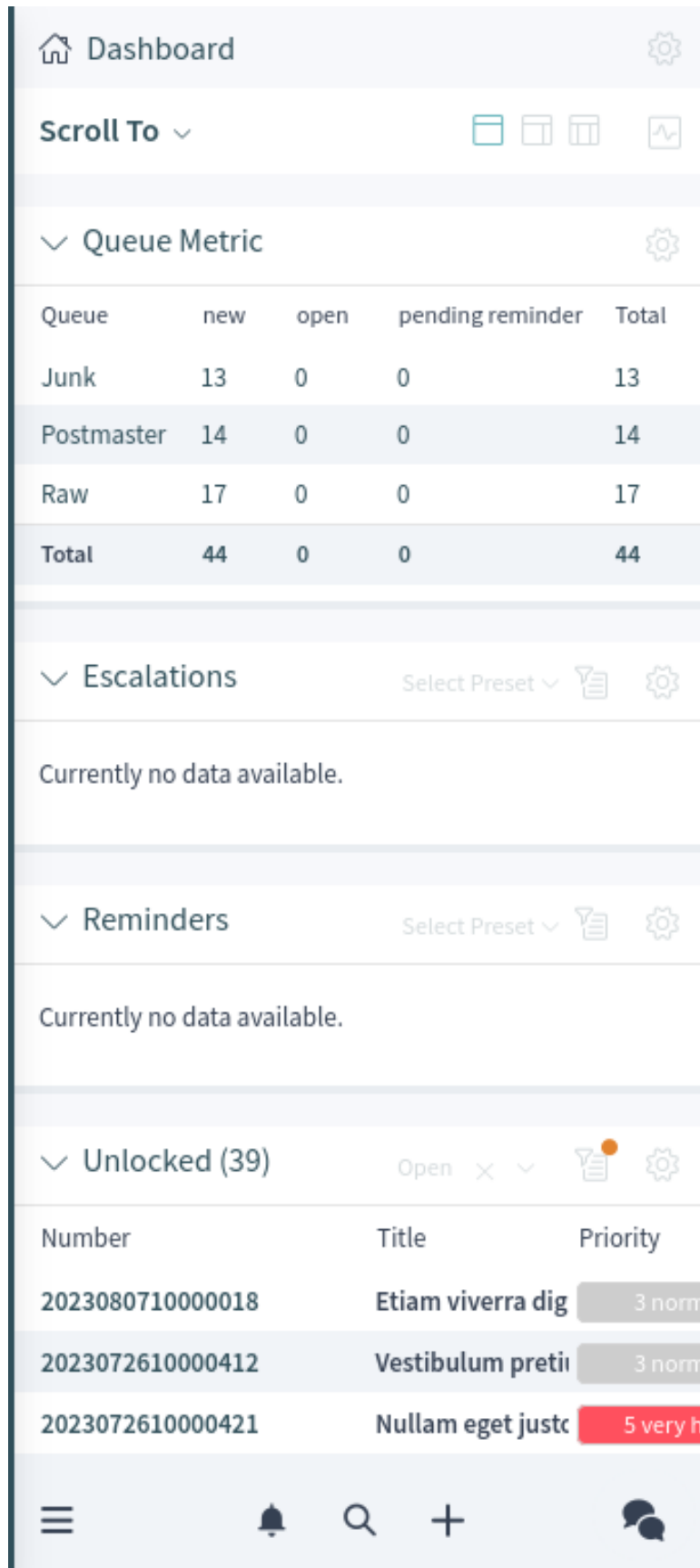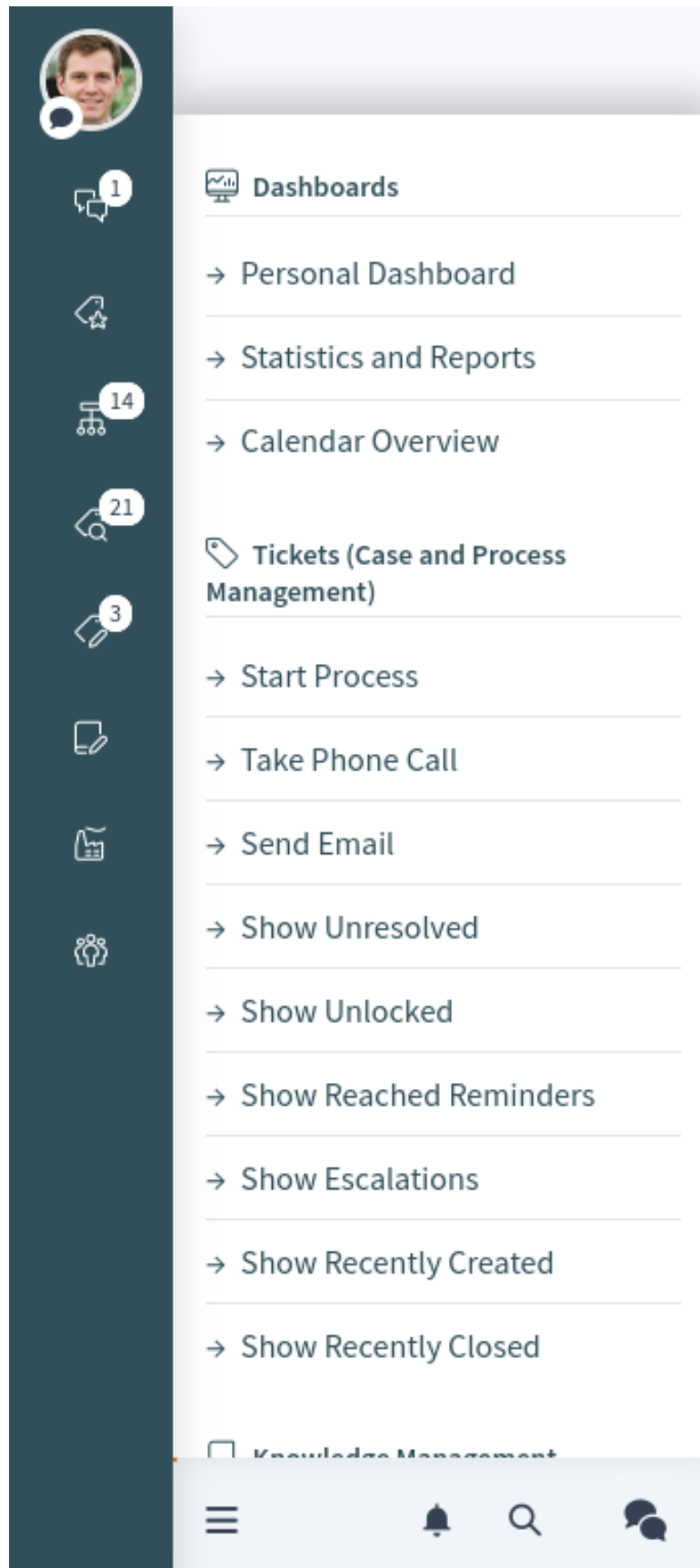
Fig. 176: Organizer Sidebar and Main Menu

Fig. 177: Portrait Mode

Fig. 178: Landscape Mode

EXTERNAL INTERFACE

2.1 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.

2.1.1 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.

2.1.2 Create Account

Depending on the settings there are two possibilities to register a new account.
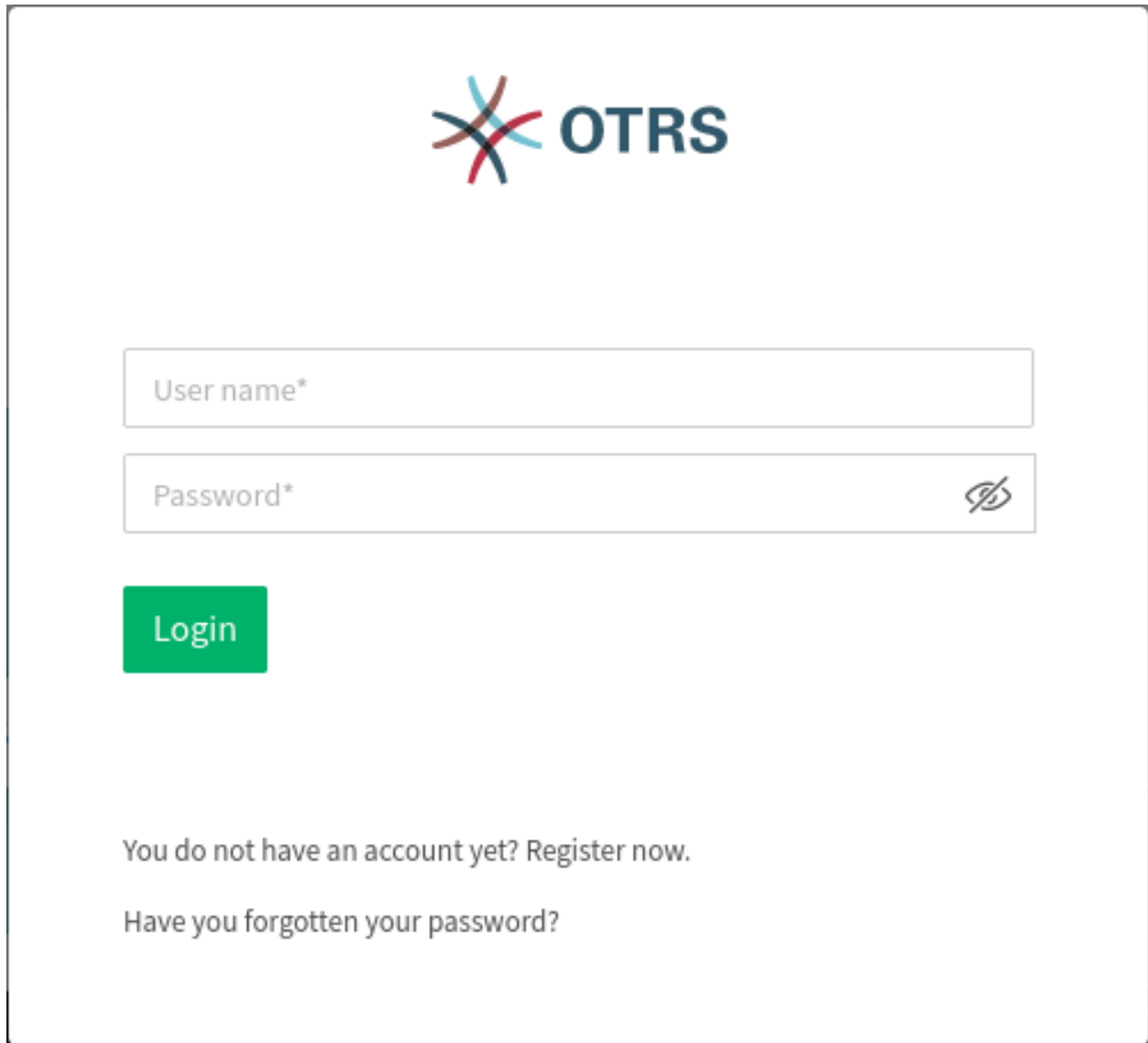
To create an account via the form:

1. Click on the *Login* button in the upper right corner.

2. Click on the *Register now* link.

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.

To create an account via email:

1. Click on the registration link.

Fig. 1: Login

Fig. 2: Create Account

2. The email client opens with a pre-configured text.

3. Send the email.

2.1.3 Change Password

Fig. 3: Change Password

1. Fill in the fields.

2. Click on the *Change* button.

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

2.1.4 Two-factor Authentication

Fig. 4: Two-factor Authentication

1. Choose your preferred authentication method.

2. Click on the *Next* button.

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.

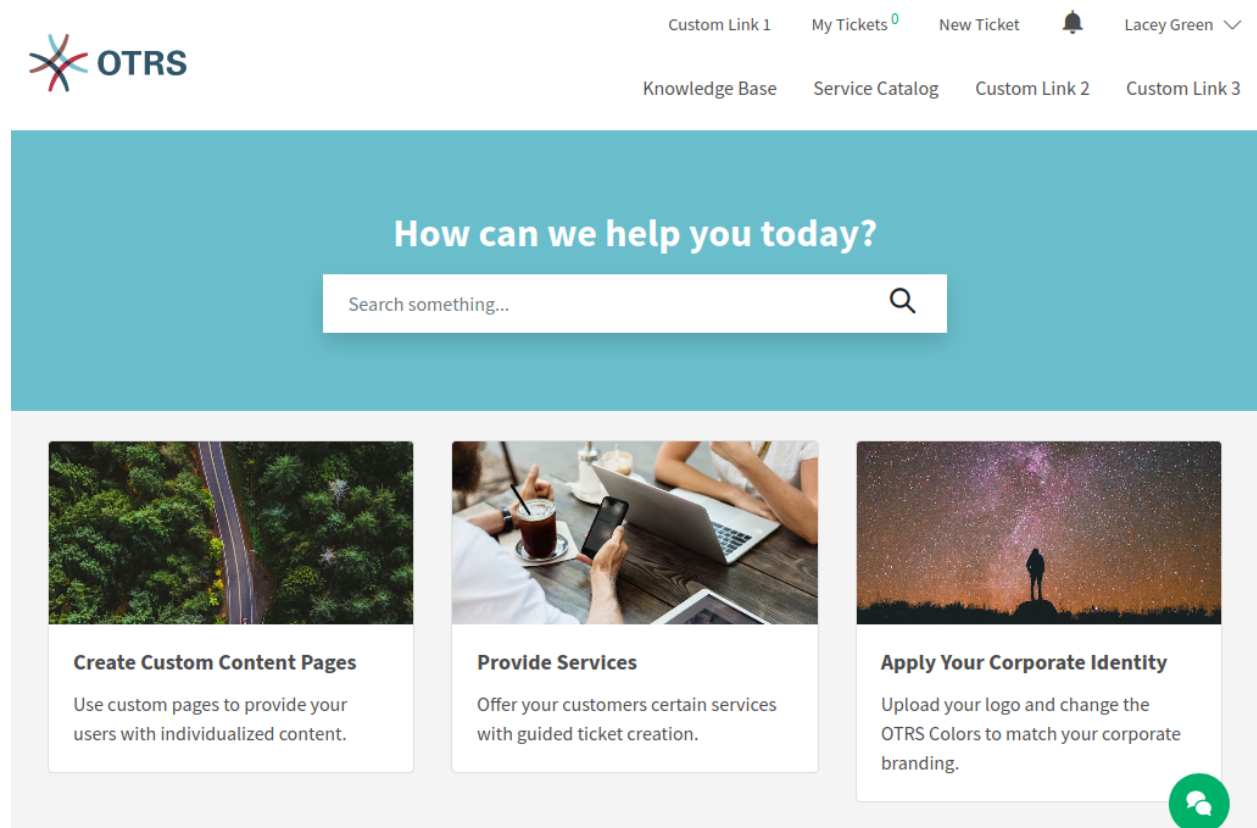2. Click on the *Verify* button.

2.2 Home Page

Fig. 5: 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 bottom 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.
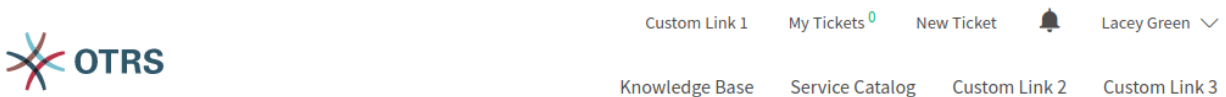

2.3 Main Navigation and Footer

Fig. 6: 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*.

Username
This menu displays the *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*.

2.4 Personal Preferences

The personal preferences screen contains the sections *General* and *Security*.

Note: The content of your *Personal Preferences* may vary depending on the settings and the installed packages.

2.4.1 General

Fig. 7: Personal Preferences - General

In the section *General*, the customer user can change the avatar image, the language of the external interface and the preferred timezone.

2.4.2 Security

In the section *Security*, the customer user can change the password and the two-factor authentication settings.

Fig. 8: Personal Preferences - Security

2.5 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.

Fig. 9: 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

After selecting a service, there is a lookup for configured queues for this service. If there are configured queues for the selected service, only those will be available in the queue selection. If there are no queues configured for the selected service, all queues will be displayed.

It is possible to add a filter button next to the queue selection. After clicking this button all available queues get restored to the queue selection field and can be selected. This feature can be enabled in the system configuration.

Configured ACLs affect the displayed queues as usual.

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.
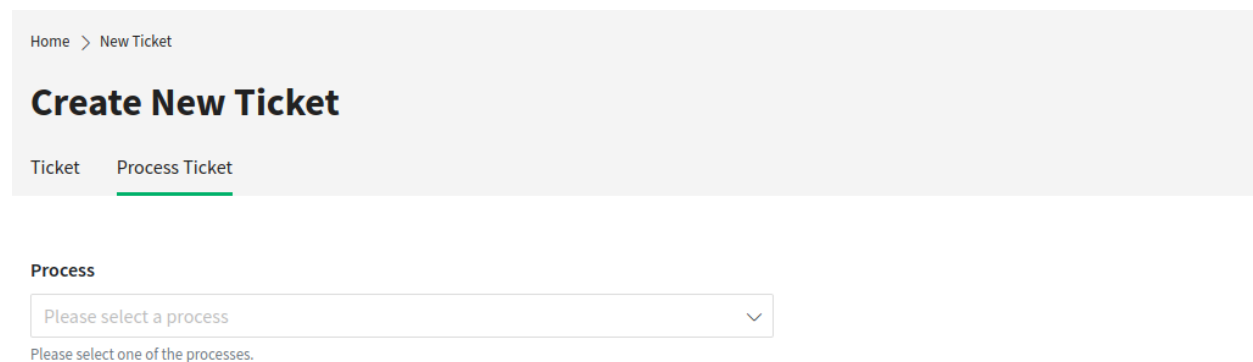

Fig. 10: Create Process Ticket

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.

2.6 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*.
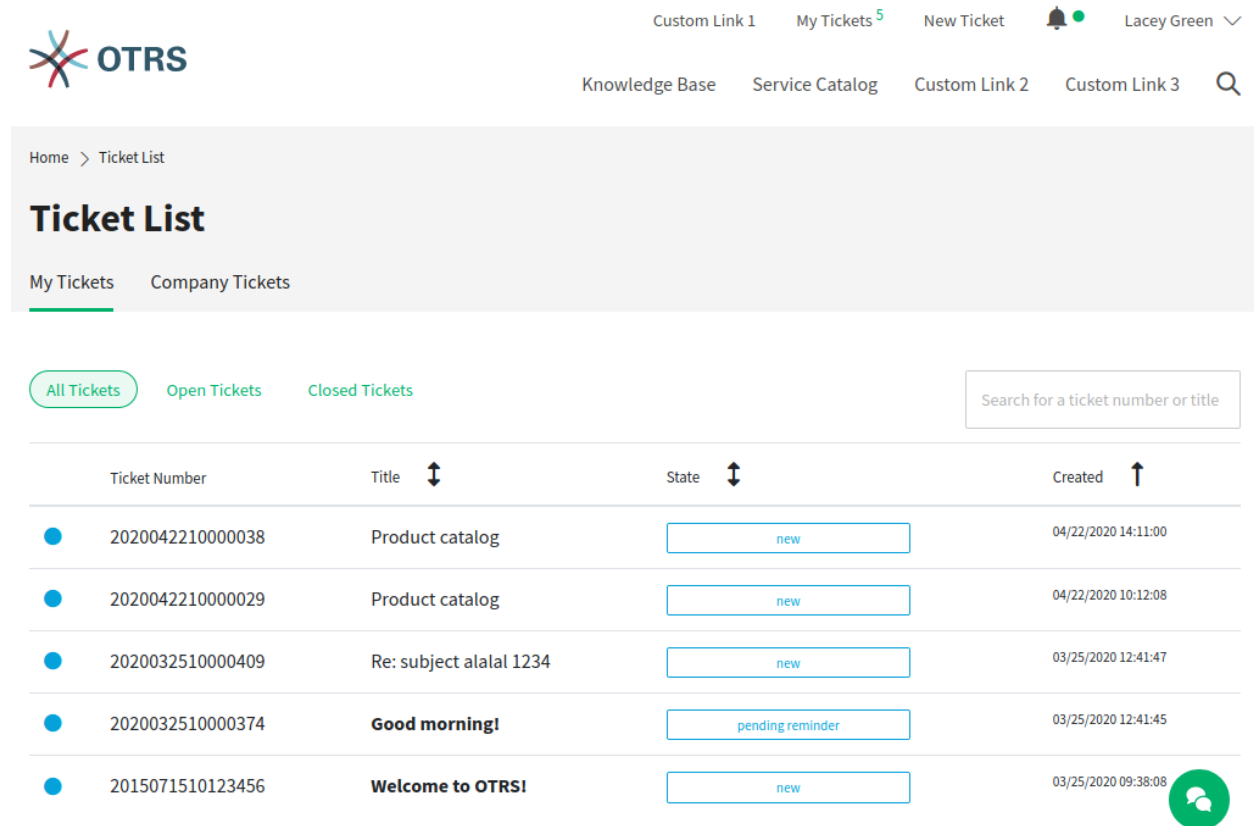
Note: The color can be different if a corporate design is applied to the external interface by the administrator.

2.6.1 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.

Fig. 11: My Tickets - All Tickets

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.

Fig. 12: My Tickets - Open Tickets

Fig. 13: My Tickets - Closed Tickets

2.6.2 Customer Dynamic Field

If a dynamic field of type *Customer* contains the customer user who is logged in to the external interface, the *Ticket List* screen is extended with a new menu item. This menu item lists the tickets, where the customer user is added as dynamic field. The label of this menu item will be the label of the dynamic field.

Home > Ticket List

Ticket List

My Tickets   Relevant Tickets   Company Tickets

All Tickets	Open Tickets	Closed Tickets	Export Ticket List	Search for a ticket number or t

	Ticket Number	Title ↕	State ↕	Created ↑
●	2021061510000028	**Important Changes**	open	06/15/2021 14:22:22

Fig. 14: Custom Contact Ticket List

This feature allows you to list tickets for customer users that they do not otherwise have access to. The customer users can be added to any ticket as dynamic field, even if they are not the customer user of the ticket.

See also:

To display the dynamic field of type *Customer* in the external interface, see the Dynamic Fields chapter of the administration manual.

The functionality is by default limited to search just contacts that are from the same company. Otherwise all contacts of all companies would be visible to every customer user that has access to the external interface.

If you want to make all contacts searchable by every customer user, you can enable this by removing the tick from the system configuration option `CustomContactFieldsRestrictContactsToCustomerOnly` and setting it as not enabled.

2.6.3 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.

2.7 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. On the right side, the following ticket information is displayed 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 *Respond to This Ticket* button on the right side scrolls the user directly to the response section of the view.

The *Print Ticket* button makes it possible to download the ticket as PDF file.

The ticket detail view can show linked tickets and knowledge base articles in the right sidebar. Linked tickets are displayed if they have the same customer user and linked knowledge base articles are displayed only if they are visible to customers or public. Clicking on a ticket or knowledge base article will lead you to the linked ticket or knowledge base article.

2.8 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 user's tickets
- State changes of a ticket

The bell icon in the meta navigation bar informs the customer user 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.

If the customer user clicks on an entry, the corresponding ticket is displayed in the *Ticket Detail View*. If the customer user clicks on the blue circle next to the title the ticket notifications can be set to read or unread.

Product catalog

Product catalog

Can you please send me the product catalog?

Created: 04/22/2020 14:11

Subject*

Re: Product catalog

Subject for a new article.

Message*

Please enter a message for the new article.

Attachments

Drop files here or click to select files

Submit

Respond to This Ticket ✎

Print Ticket 🖨

State
new

Ticket Number
2020042210000038

Queue
Raw

Priority
3 normal

Fig. 15: Ticket Detail View

Fig. 16: Notification Screen on Hover
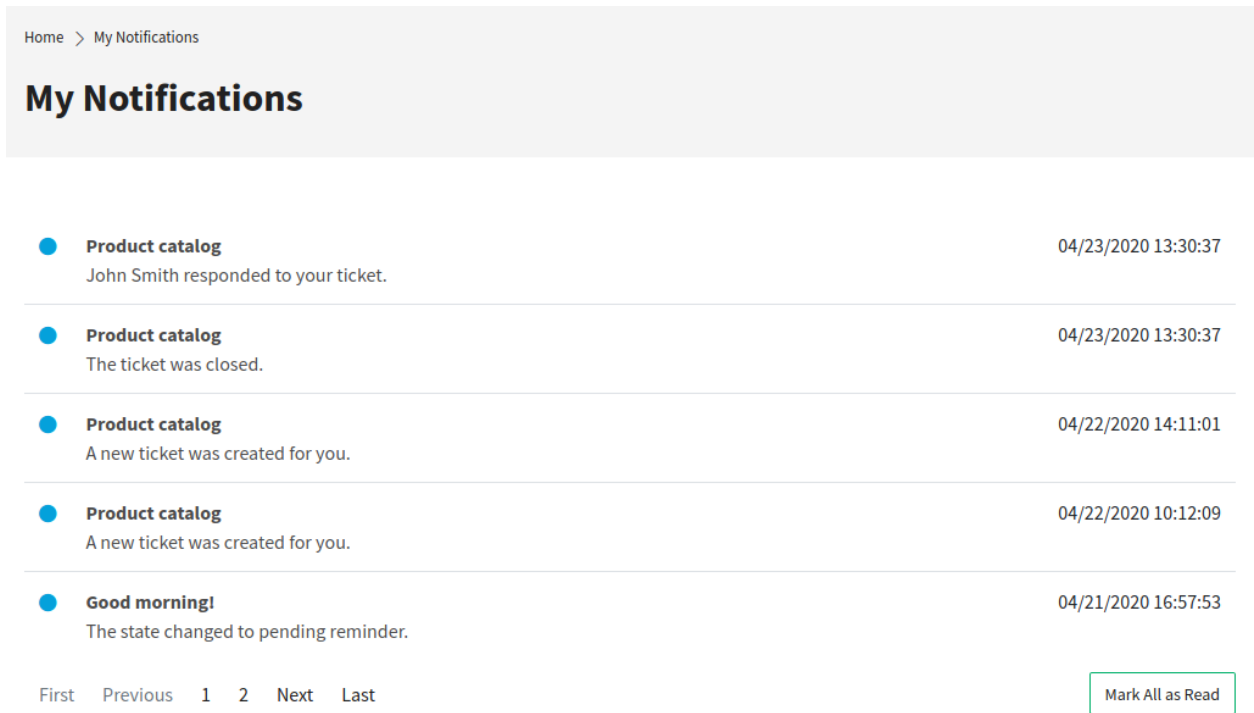
Fig. 17: My Notifications

2.9 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 high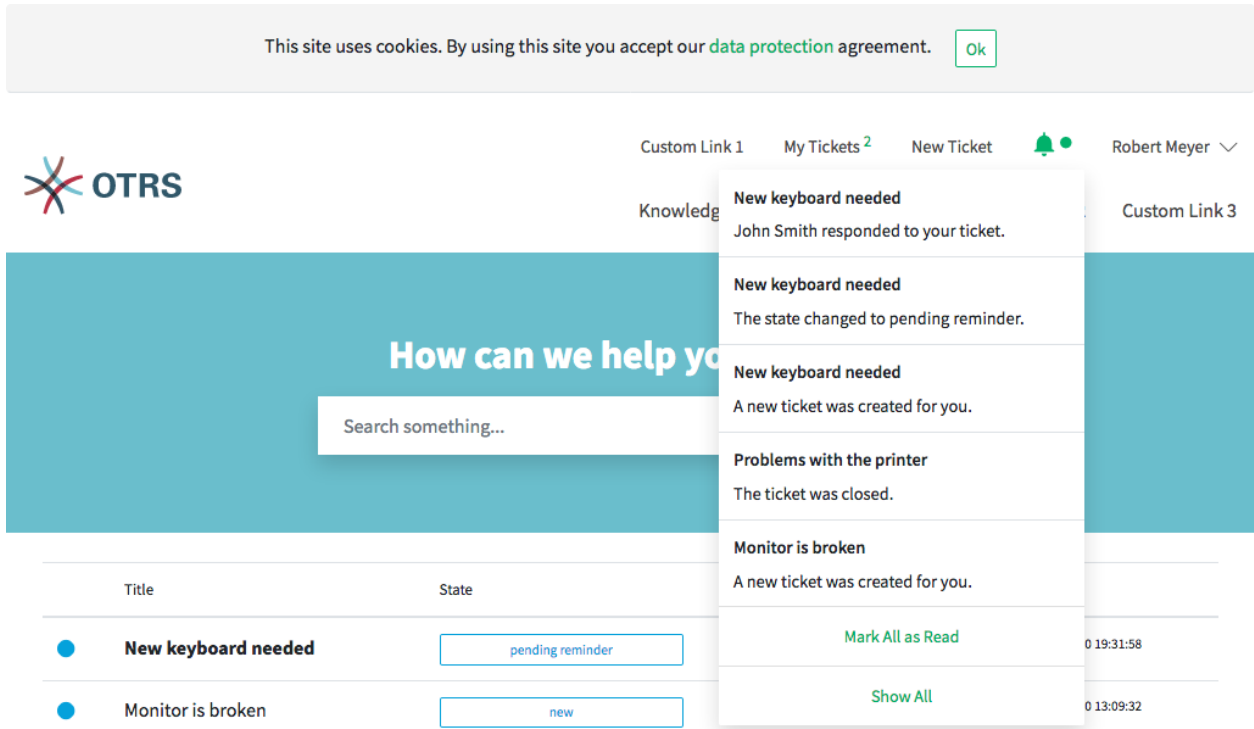lighted when the customer user hovers over the entry. If the customer user clicks the hovered-over entry, he will be guided to the linked page.

Fig. 18: Service Catalog

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.
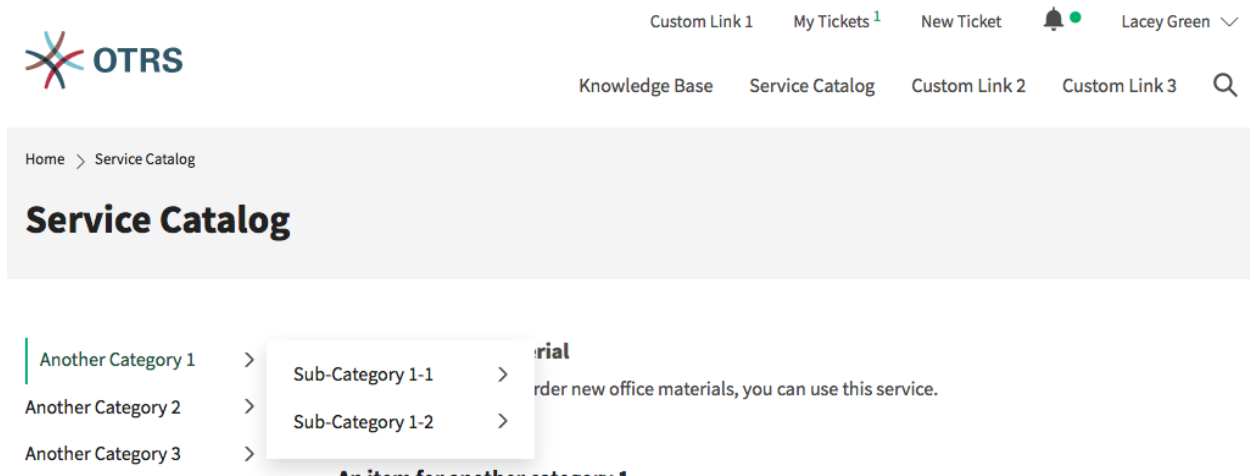
Fig. 19: Catalog with Subcategories

2.10 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. 20: 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
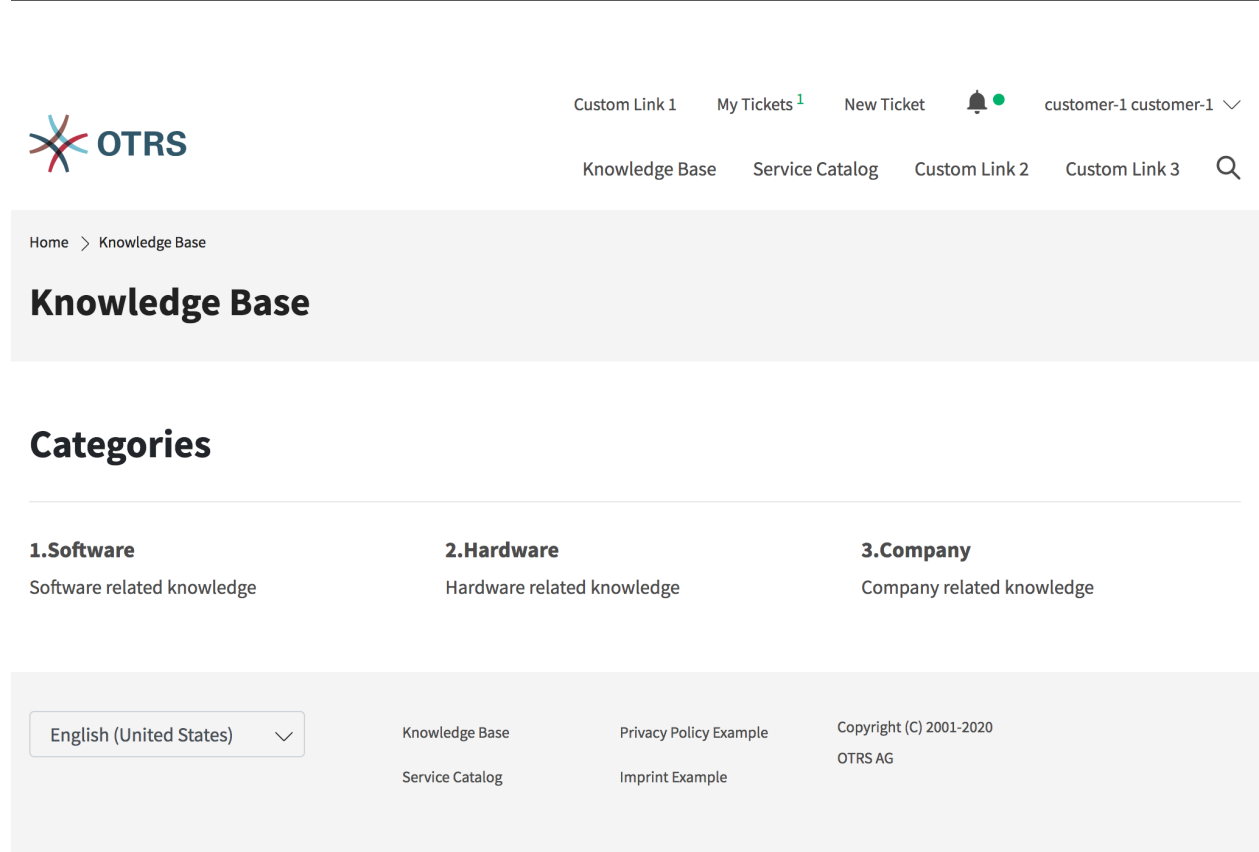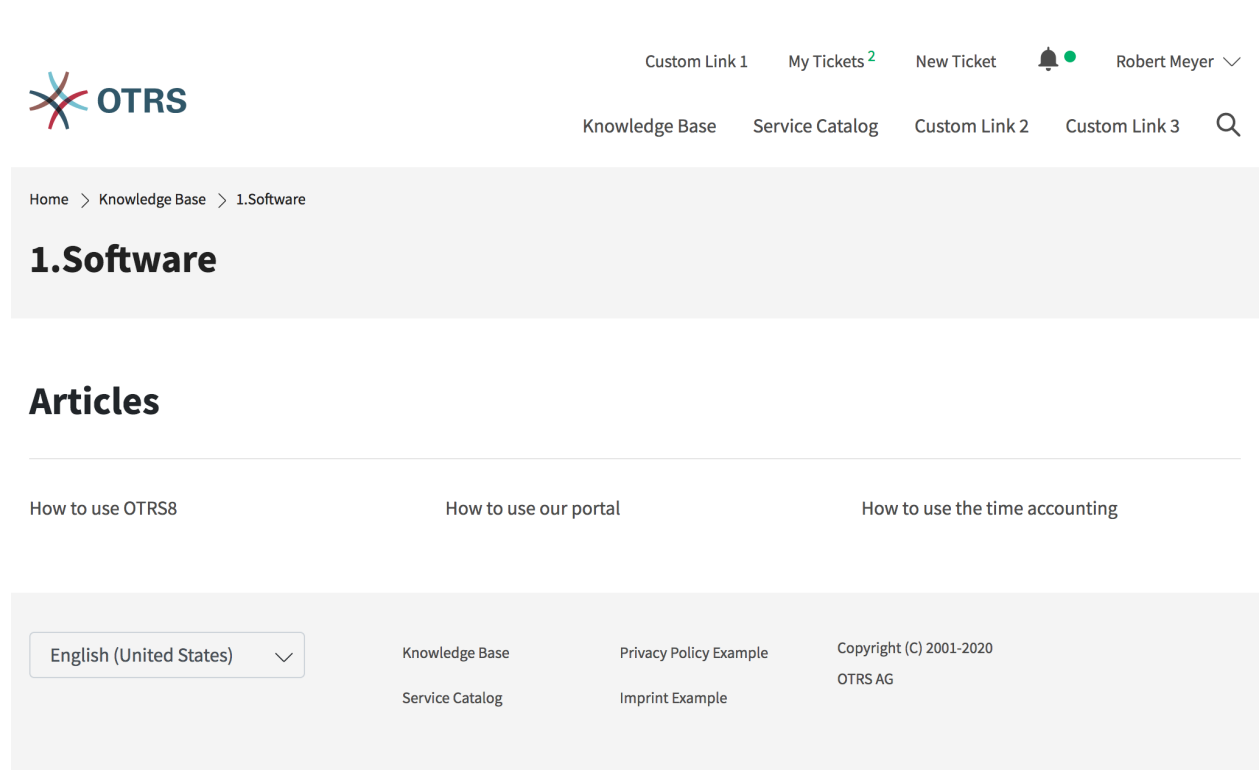OTRS AG

Fig. 21: Knowledge Base Article

2.11 Appointments

This feature allows appointments to appear in the external interface in such a way that customer users can easily see information about availability or scheduling, such as when they want to find the date of an online meeting.

The external interface has a menu item to show appointments. In this screen all appointments are displayed that have the visibility set to *External Restricted* or *Public* by an agent.

Fig. 22: Appointments Screen in External Interface

This screen has three tabs:

Personal
  Appointments that have no linked tickets or the customer user is the assigned customer user of the ticket linked to the appointment.

Company
  Appointments that have linked tickets where the primary or secondary customer of the customer user is the same as the customer of the logged in customer user.

All
  Personal and company appointments.

Each tab has filters to selecting the time range for the displayed appointments. The possible values are *Day*, *Week*, *Month* and *Year*. Clicking on the *Today* button will show the appointments for the current day.

You can use the search box to filter the displayed appointments.

Hovering an appointment will give a brief overview about the appointment while clicking on an appointment will lead to the detail view of the appointment.

See also:

The field *Resource* is configurable in the system configuration to be shown or not. It is disabled by default.

2.12 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

2.13 Custom Pages

The links on custom pages can be used to link to other web pages. The content allowed on custom pages depends on the settings that a system administrator has made.

2.14 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.

2.14.1 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.

2.14.2 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 remaining steps are the same as described in the *Customer User to Agent* section.
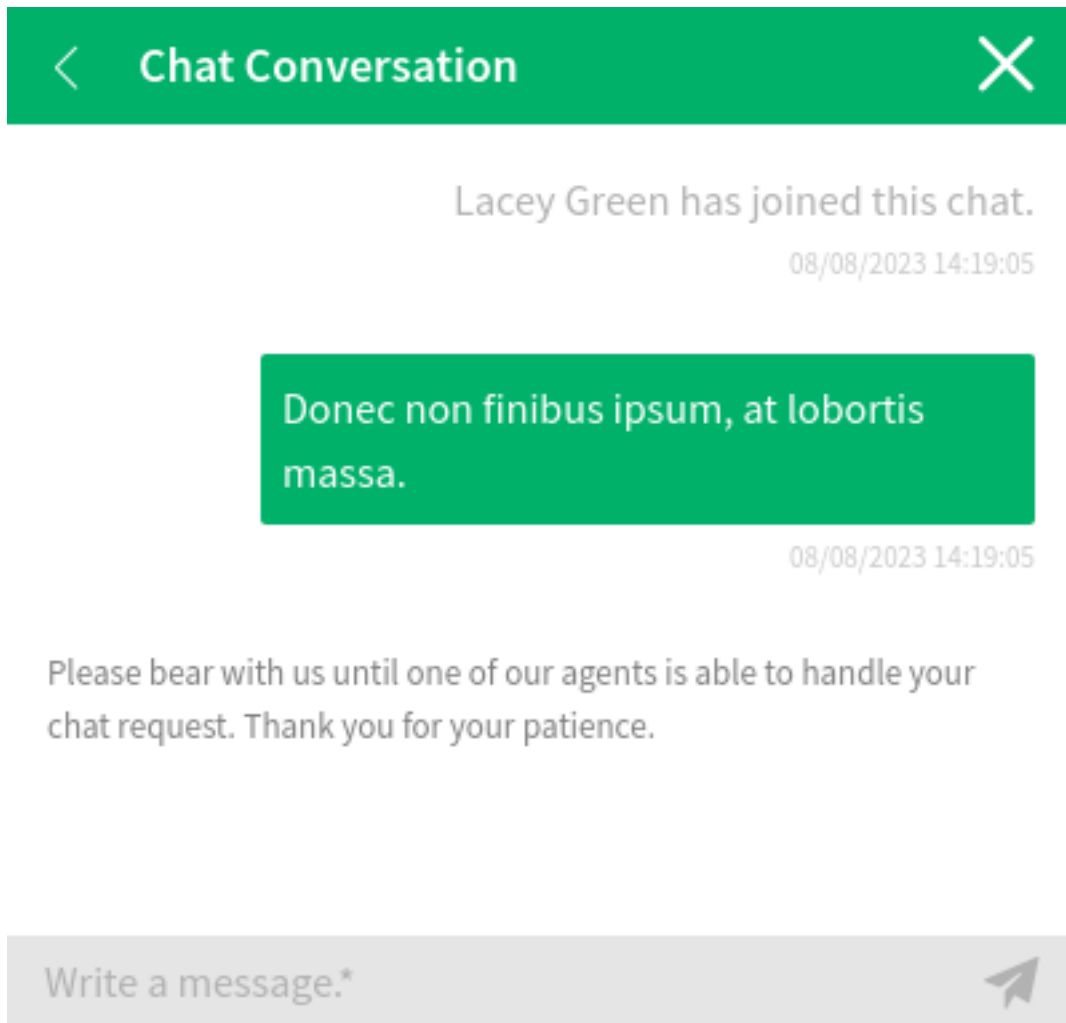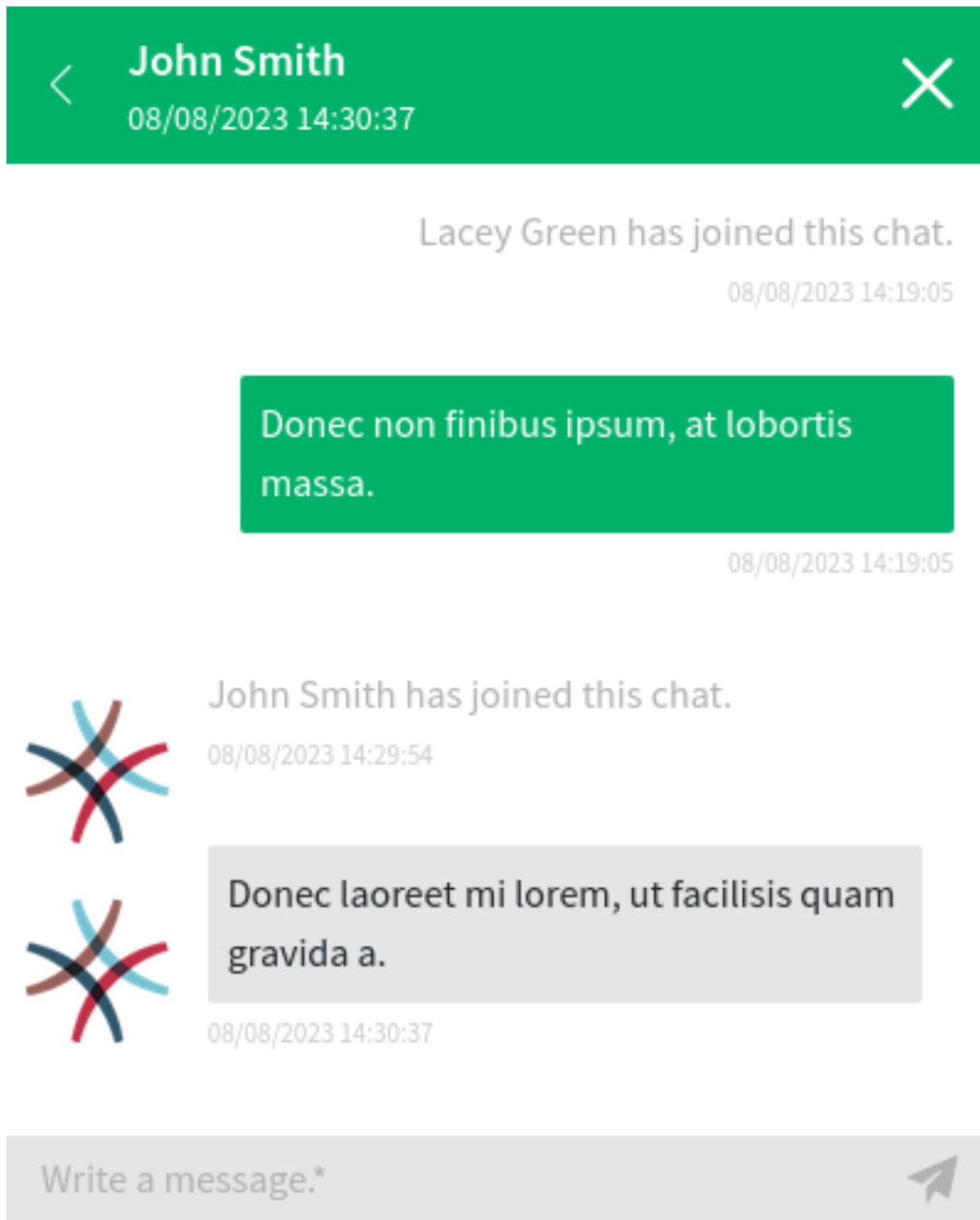
Fig. 23: Start Chat Window

Fig. 24: Customer User Chat
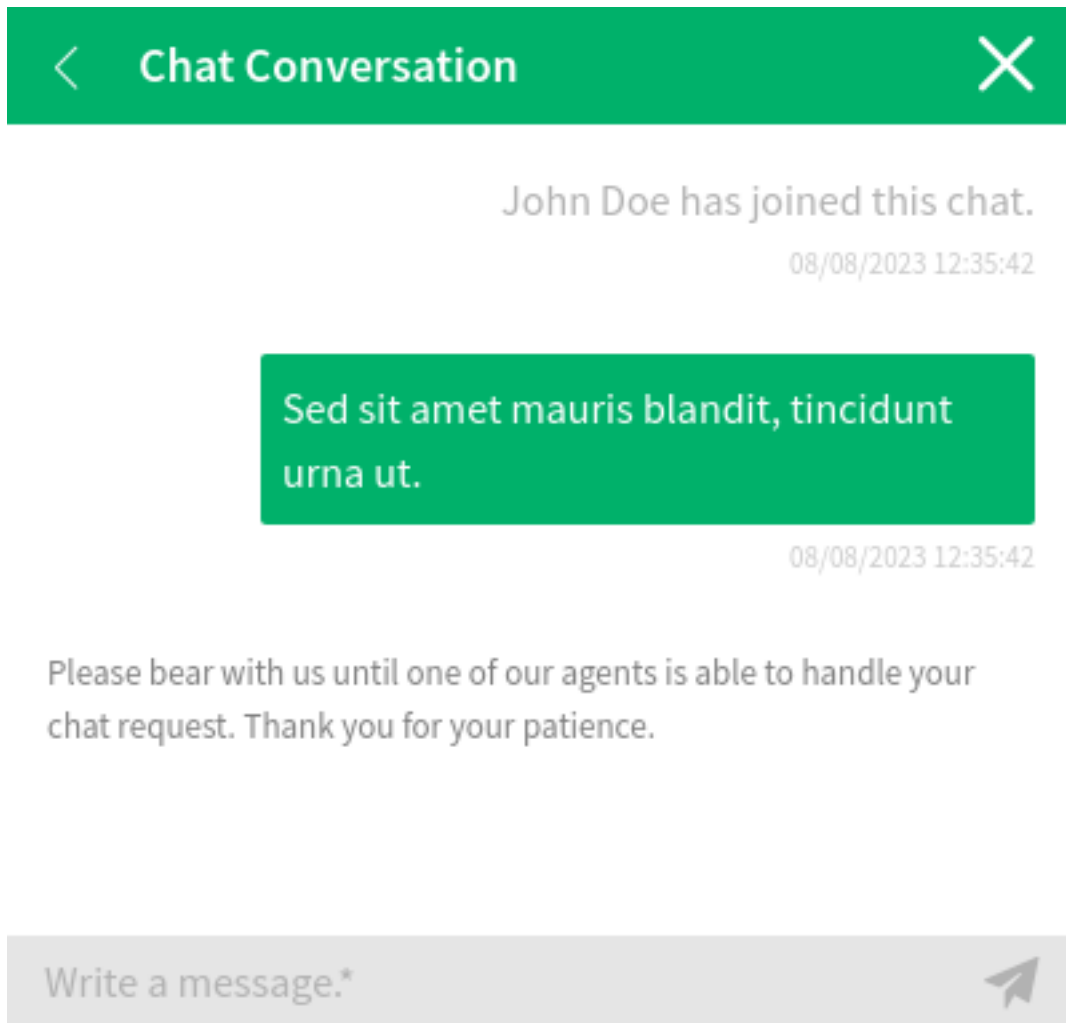
Fig. 25: Start Chat Window

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.

John Smith

Nunc eget ante gravida, sodales erat a, sollicitudin le…

Fig. 26: Chat Request on External Interface

3. When you accept the chat request, you can chat now.

4. When you close the chat, it is possible to send the chat via email or to create a ticket from the conversation.

Fig. 27: Agent to Customer User Chat

Fig. 28: Save the Conversation on External Interface

APPENDIX

3.1 Accessibility Statement

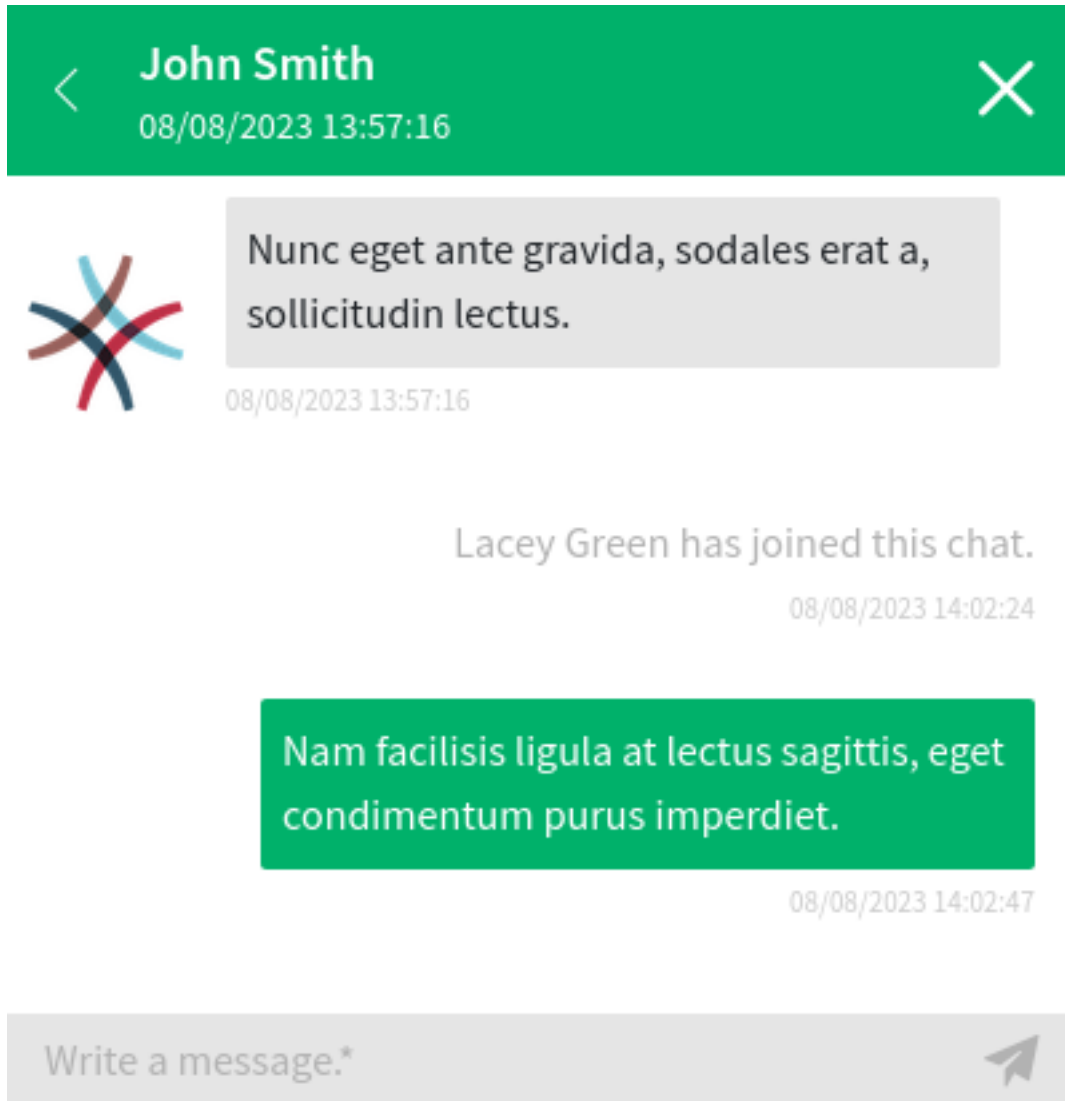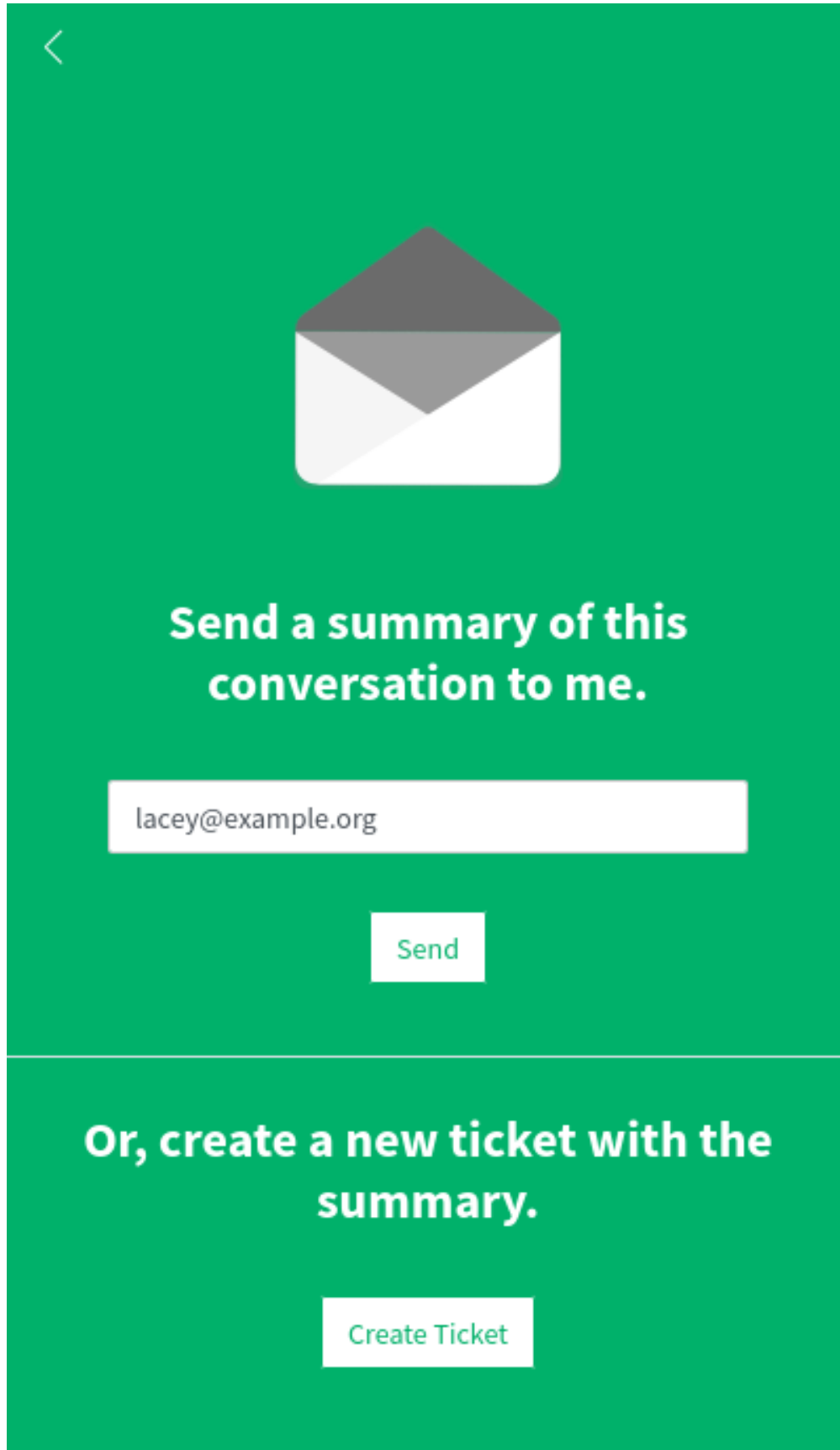The OTRS AG endeavors to ensure accessibility of its web application **OTRS** 8 in accordance with German legislation. The legal basis is the *German Act on Equal Opportunities for Persons with Disabilities* (Behindertengleichstellungsgesetz, BGG) as well as the *Accessible Information Technology Ordinance* (Barrierefreie Informationstechnik-Verordnung, BITV 2.0) as amended. This accessibility statement is applicable to the web application **OTRS** 8 stating the OTRS AG as the editor in the legal notice section.

OTRS 8 has built-in high contrast themes for users with visual disabilities.

To activate the high contrast themes:

1. Open the *Personalization* menu.

2. Select the *User Profile* menu item.

3. In the *Style* section, select either *High Contrast Bright* or *High Contrast Dark* style.

3.1.1 Current Compatibility with Requirements

The web application is not fully compatible with the accessibility requirements pursuant to section 3 (1) to (3) and section 4 of the Ordinance on *Accessible Information Technology* (BITV 2.0).

The following contents of the web application **OTRS** 8 is not fully accessible for the reasons stated below:

Success Criterion 1.3.1 Info and Relationships [Level A]
Fonts marked in bold are displayed with a different font style and controlled with CSS. Not all text fragments are enclosed with `p`, but with `span`.

Success Criterion 2.1.1 Keyboard [Level A]
The calendar in the *Grid* view cannot be scrolled with the keyboard, but the *Agenda* and *Timeline* views work properly.

Success Criterion 3.2.2 On Input [Level A]
With some forms (e.g. creating statistics or selecting a process), new form elements are dynamically added below the existing form in the visible area after certain form elements have been selected.

3.1.2 Issuance of This Accessibility Statement

This statement was issued on 23 February 2021. The verification of its compliance is based on an BITV self-assessment, which was completed in December 2020.

3.1.3 Report Barrier: Feedback and Contact

Would you like to inform us about existing barriers or ask for information about what is being done to ensure that our website is accessible? Please send us an email to product@otrs.com.

3.2 Keyboard Shortcuts

Dashboard

- Personal Dashboard (d)
- Statistics and Reports (v)
- Calendar Overview (c)

Tickets

- Start Process (p)
- Take Phone Call (n)
- Send Email (m)
- Send SMS (b)
- Show Unresolved (o)
- Show Unlocked (l)
- Show Reached Reminders (r)
- Show Escalations (e)
- Show Recently Created (t)
- Show Recently Closed (z)

Knowledge Management

- Add Knowledge (k)
- Show Recently Added (a)
- Show Recently Updated (u)
- Show Highest Rated (h)

Customer Management

- Create Customer (y)
- Create Customer User (x)

Calendar

- Add Appointment (j)

Administration

- Open Administrator Dashboard (f)
- Open System Configuration (g)
- Manage Contacts with Data (q)

Search

- Start a search (s)

See also:

The accesskey activation depends on the browser and the used platform. Please refer to the accesskey chapter in *MDN Web Docs* for more information.