
(T U B)

OTOBO Administration Manual

10.1

Rother OSS GmbH

2024 09 23

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Published by: Rother OSS GmbH, (<https://otobo.de>), Oberwaling 31, 94339 Leiblfing, Germany.

Authors: OTRS AG (original version), Rother OSS GmbH (<https://otobo.de>).



OTOBO is an open source ticket request system with many features to manage customer telephone calls and emails. It is distributed under the GNU General Public License (GPL) and tested on various Linux platforms. Do you receive many emails and want to answer them with a team of agents?

1.1

This manual is intended for use by OTOBO administrators. The chapters describe the administration of the OTOBO software. The administrator interface is available in the Admin menu item of the main menu, when you logged in as an administrator. Administrators are users, who are member of the admin group.

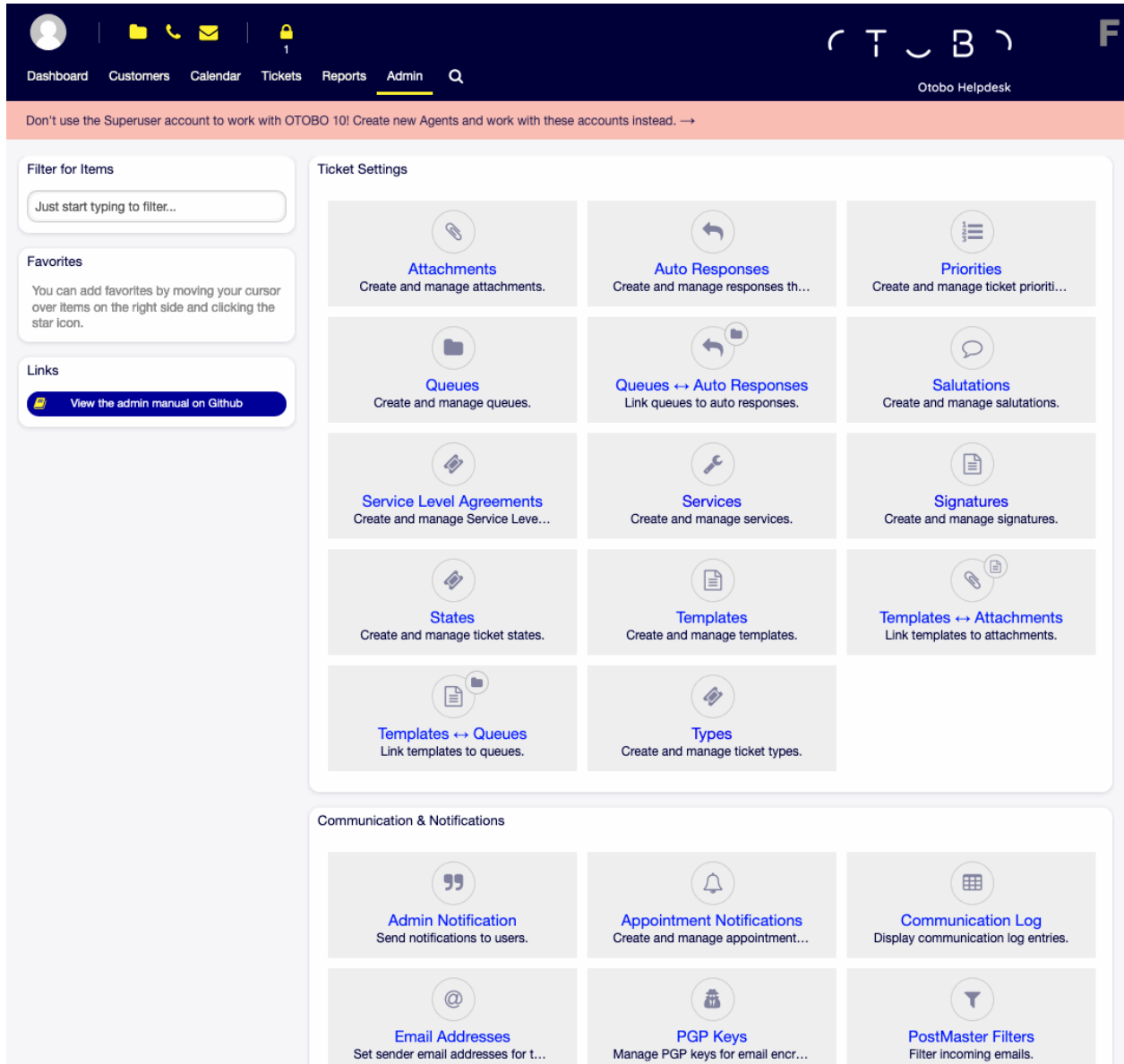
This manual shows the configuration possibilities needed to solve common problems. The chapters:

1. Identify a typical use-case for the administrator, to aid in orientation, and explain **what** OTOBO does to provide a solution (**warranty**).
2. Direct you **how** to configure OTOBO to fit your use-case (**utility**).

The chapters are the same as the modules in the administrator interface. The order of the chapters are also the same as they are displayed alphabetically in the (English) administrator interface. However, the steps to do to configure a fresh new OTOBO installation is different from this order. We recommend to configure OTOBO to do the steps as explained below.

1.2

: The installation of OTOBO is explained in a separate [Installation Guide](#). To install OTOBO or upgrade OTOBO from a previous version, follow the steps described there.



1.1: [Screenshot]

OTOB Administration Manual, 10.1

1.3 Become OTOBO Expert

The next chapters of this manual describe the features and configuration settings of OTOBO more detailed. There is a separated manual for [Configuration Options References](#), that gives you a good overview of [OTOB](#), that can be adjusted to modify the behavior of OTOBO.

Ticket#2020111949000011 — User cannot login to his mail account

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

- Move -

▼ Article Overview - 1 Article(s)

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

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

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

Mark | Print | Split | Forward | Reply

The user reports outlook will not accept his password.

👤

▼ Ticket Information

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

▼ Customer Information

Firstname: Wyle
 Lastname: Coyote
 Username: we
 Email: we@acme.example.com
 Customer: Acme Inc.
 Comment: A great company
 🚫 [Open tickets \(customer\) \(1\)](#)

👍
 Powered by Rother OSS

2.1: 1000000

Attachment Management

Actions

Filter for Attachments

List

NAME	FILENAME	COMMENT	VALIDITY	CHANGED	CREATED	DELETE
Product	troubleshooting-guide.doc		valid	11/19/2020 13:29 (Europe/Berlin)	11/19/2020 13:29 (Europe/Berlin)	🗑
Service Agreement	service-agreement.pdf		valid	11/19/2020 13:29 (Europe/Berlin)	11/19/2020 13:29 (Europe/Berlin)	🗑

2.2: 1000000

3. 3.1.1.1

Add Attachment

* Name:

* Attachment: Keine Datei ausgewählt.

* Validity:

Comment:

Save or **Cancel**

2.3: 3.1.1.1

3.1.1.1

1. 3.1.1.1.1
2. 3.1.1.1.2
3. 3.1.1.1.3 3.1.1.1.4

Edit Attachment

* Name:

Attachment: Keine Datei ausgewählt.

* Validity:

Comment:

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

2.4: 3.1.1.1

3.1.1.1

1. 3.1.1.1.1
2. 3.1.1.1.2

List

NAME	FILENAME	COMMENT	VALIDITY	CHANGED	CREATED	DELETE
Product Manual Annex	troubleshooting-guide.doc		valid	11/19/2020 13:29 (Europe/Berlin)	11/19/2020 13:29 (Europe/Berlin)	
Service Agreement	service-agreement.pdf		valid	11/19/2020 13:29 (Europe/Berlin)	11/19/2020 13:29 (Europe/Berlin)	

2.5: 3.1.1.1

2.2.2 自動返信

自動返信の送信条件を設定する。

項目 * 自動返信の送信条件を設定する。

項目 * 自動返信の送信条件を設定する。

項目 自動返信の送信条件を設定する。

項目 * The event type that triggers the sending of this automatic response. Only one automatic response can be sent automatically per event. The following event types are available:

auto follow up-自動返信 Is triggered for any follow-up message on an existing ticket. This includes also article notes which are visible for the customer. If the 自動返信 option 'AutoResponseForWebTickets' is activated the automatic response is also sent for follow up articles created through the customer web interface or through a telephone call otherwise only for follow up articles created from a customer email. This automatic response does not apply for new tickets, see the 'auto reply' event type.

auto reject 自動返信 If the 自動返信 setting 'follow up option' is set to 'reject' this event will be triggered if a customer answers in a ticket, that is already closed.

auto remove-自動返信 If a ticket is deleted by the system, the customer gets this automatic response.

auto reply-自動返信 If a new ticket is generated the customer will get this auto response. If the 自動返信 option 'AutoResponseForWebTickets' is activated the automatic response is also sent for new tickets created through the customer web interface or through a telephone call (telephone ticket) otherwise only for new tickets created from a customer email. This automatic response does not apply if the 'auto reply/new ticket' event type occurs.

自動返信/自動返信 If the 自動返信 setting 'follow up option' is set to 'new ticket' this event will be triggered if a customer answers in a ticket, that is already closed. You can use this message to inform the customer of the new ticket number.

項目 * 自動返信の送信条件を設定する。

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

項目 自動返信の送信条件を設定する。

2.2.3 変数

Using variables in the text makes it possible to personalize messages. Variables, known as OTOBO tags, are replaced by OTOBO when generating the message. Find a list of available tags stems for this resource at the bottom of both add and edit screens.

For example, the variable <OTOBO_TICKET_TicketNumber> expands to the ticket number allowing a template to include something like the following.

Ticket#<OTOBO_TICKET_TicketNumber>

自動返信

Ticket#2018101042000012

Reference

You can use the following tags:

<OTOBO_CUSTOMER_SUBJECT[20]>

To get the first 20 character of the subject.

<OTOBO_CUSTOMER_EMAIL[5]>

To get the first 5 lines of the email.

<OTOBO_CUSTOMER_REALNAME>

To get the name of the ticket's customer user (if given).

<OTOBO_CUSTOMER_*>

To get the article attribute (e. g. <OTOBO_CUSTOMER_From>, <OTOBO_CUSTOMER_To>, <OTOBO_CUSTOMER_Cc>, <OTOBO_CUSTOMER_Subject>, <OTOBO_CUSTOMER_Body>).

<OTOBO_CUSTOMER_DATA_*>

Options of the current customer user data (e. g. <OTOBO_CUSTOMER_DATA_UserFirstname>).

<OTOBO_OWNER_*>

Ticket owner options (e. g. <OTOBO_OWNER_UserFirstname>).

<OTOBO_RESPONSIBLE_*>

Ticket responsible options (e. g. <OTOBO_RESPONSIBLE_UserFirstname>).

<OTOBO_CURRENT_*>

Options of the current user who requested this action (e. g. <OTOBO_CURRENT_UserFirstname>).

<OTOBO_TICKET_*>

Options of the ticket data (e. g. <OTOBO_TICKET_TicketNumber>, <OTOBO_TICKET_TicketID>, <OTOBO_TICKET_Queue>, <OTOBO_TICKET_State>).

<OTOBO_TICKET_DynamicField_*>

Options of ticket dynamic fields internal key values (e. g. <OTOBO_TICKET_DynamicField_TestField>, <OTOBO_TICKET_DynamicField_TicketFreeText1>).

<OTOBO_TICKET_DynamicField_*_Value>

Options of ticket dynamic fields display values, useful for Dropdown and Multiselect fields (e. g. <OTOBO_TICKET_DynamicField_TestField_Value>, <OTOBO_TICKET_DynamicField_TicketFreeText1_Value>).

<OTOBO_CONFIG_*>

Config options (e. g. <OTOBO_CONFIG_HttpType>).

Example response:

```
Thanks for your email.

You wrote:
<snip>
<OTOBO_CUSTOMER_EMAIL[6]>
```

2.9: 2.9.1

2.3 优先级

OTOBO 提供基于默认五个优先级的交通灯系统来处理此任务。

- Blue: very low
- Green: low
- Grey: normal
- Pink: high
- Red: very high

使用此屏幕向系统添加优先级。新鲜 OTOBO 安装包含五个默认优先级级别。优先级管理屏幕可在票务设置的优先级模块中访问。

Use this screen to add priorities to the system. A fresh OTOBO installation contains five default priority levels. The priority management screen is available in the Priorities module of the Ticket Settings group.



图 2.10: 优先级管理

2.3.1 添加优先级

要添加优先级，请按照以下步骤操作：

1. 单击“添加优先级”按钮。

1. 输入名称和颜色。
2. 选择有效性。
3. 单击“保存”按钮。



要删除优先级，请按照以下步骤操作：

1. 单击“删除”按钮。

1. 确认删除。

Add Priority

* Name:

* Validity:

Save or **Cancel**

2.11: Add Priority

1. Add priority
2. Add priority
3. Add priority

Edit Priority

* Name:

* Validity:

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

2.12: Edit Priority

ACL:

ACL:

2.3.2 Add priority

*

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

Notice

This priority is used in the following config settings:

- FAQ::ApprovalTicketPriority
- PostmasterDefaultPriority
- Process::DefaultPriority
- Ticket::Frontend::AgentTicketBulk###PriorityDefault
- Ticket::Frontend::AgentTicketClose###PriorityDefault
- Ticket::Frontend::AgentTicketEmail###Priority
- Ticket::Frontend::AgentTicketFreeText###PriorityDefault
- Ticket::Frontend::AgentTicketNote###PriorityDefault

2.13: [Screenshot]

2.4 [Screenshot]

Teams need a workspace and the ability to dispatch work based on skill level, security level, department or responsibility just to name a few. Other teams may also need to view or react to these requests as well.

OTOBO uses queues to provide your teams with structure. Queues provide a powerful way to divide and disperse the work to the responsible group of people.

Use this screen to add queues to the system. In a fresh OTOBO installation there are 4 default queues: Raw, Junk, Misc and Postmaster. All incoming messages will be stored in the Raw queue if no filter rules are defined. The Junk queue can be used to store spam messages. The queue management screen is available in the Queues module of the Ticket Settings group.

Queue Management

Actions

Filter for Queues

Just start typing to filter...

NAME	GROUP	COMMENT	VALIDITY	CHANGED	CREATED
Junk	users	All junk tickets.	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
Misc	users	All misc tickets.	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
Postmaster	users	Postmaster queue.	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
Raw	users	All default incoming ti...	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)

2.14: [Screenshot]

2.4.1

- 1.
- 2.
- 3.

:

- 1.
- 2.
- 3.

:

:

2.4.2

*

:::

*

0

-

:

Notify by Notify before time limit is reached (in percent).

-

Notify by Notify before time limit is reached (in percent).

Add Queue

* Name:

Sub-queue of:

* Group:

Unlock timeout minutes:

0 = no unlock - 24 hours = 1440 minutes - Only business hours are counted.

If an agent locks a ticket and does not close it before the unlock timeout has passed, the ticket will unlock and will become available for other agents.

Escalation - first response time (Notify by)

(minutes): 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

If there is not added a customer contact, either email-external or phone, to a new ticket before the time defined here expires, the ticket is escalated.

Escalation - update time (minutes): (Notify by)

0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

If there is an article added, such as a follow-up via email or the customer portal, the escalation update time is reset. If there is no customer contact, either email-external or phone, added to a ticket before the time defined here expires, the ticket is escalated.

Escalation - solution time (minutes): (Notify by)

0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

If the ticket is not set to closed before the time defined here expires, the ticket is escalated.

* Follow up Option:

Specifies if follow up to closed tickets would re-open the ticket, be rejected or lead to a new ticket.

* Ticket lock after a follow up:

If a ticket is closed and the customer sends a follow up the ticket will be locked to the old owner.

* System address:

Will be the sender address of this queue for email answers.

Default sign key:

To use a sign key, PGP keys or S/MIME certificates need to be added with identifiers for selected queue system address.

* Salutation:

The salutation for email answers.

* Signature:

The signature for email answers.

Calendar:

* Validity:

Comment:

Save or Cancel

Edit Queue

*** Name:**

Sub-queue of:

*** Group:**

Unlock timeout minutes:
 0 = no unlock - 24 hours = 1440 minutes - Only business hours are counted.
 If an agent locks a ticket and does not close it before the unlock timeout has passed, the ticket will unlock and will become available for other agents.

Escalation - first response time (Notify by)
 (minutes): 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.
 If there is not added a customer contact, either email-external or phone, to a new ticket before the time defined here expires, the ticket is escalated.

Escalation - update time (minutes): (Notify by)
 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.
 If there is an article added, such as a follow-up via email or the customer portal, the escalation update time is reset. If there is no customer contact, either email-external or phone, added to a ticket before the time defined here expires, the ticket is escalated.

Escalation - solution time (minutes): (Notify by)
 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.
 If the ticket is not set to closed before the time defined here expires, the ticket is escalated.

*** Follow up Option:**
 Specifies if follow up to closed tickets would re-open the ticket, be rejected or lead to a new ticket.

*** Ticket lock after a follow up:**
 If a ticket is closed and the customer sends a follow up the ticket will be locked to the old owner.

*** System address:**
 Will be the sender address of this queue for email answers.

Default sign key (*otobo@localhost*):

To use a sign key, PGP keys or S/MIME certificates need to be added with identifiers for selected queue system address.

*** Salutation:**
 The salutation for email answers.

*** Signature:**
 The signature for email answers.

Calendar:

*** Validity:**

Comment:

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

2.6.1

- 1.
- 2.
- 3.

Add Salutation

* Name:

* Salutation: **B I U S** | | | | | | | | | | |

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

* Validity:

Comment:

Save or Cancel

2.21:

- 1.
- 2.
- 3.

OT:

OT:

2.6.2

OT *

OT *

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

OT

2.6.3

Using variables in the text makes it possible to personalize messages. Variables, known as OTOBO tags, are replaced by OTOBO when generating the message. Find a list of available tags stems for this resource at the bottom of both add and edit screens.

Hint

You can use the following tags:

<OTOBO_OWNER_*>
Ticket owner options (e. g. <OTOBO_OWNER_UserFirstname>).

<OTOBO_RESPONSIBLE_*>
Ticket responsible options (e. g. <OTOBO_RESPONSIBLE_UserFirstname>).

<OTOBO_CURRENT_*>
Options of the current user who requested this action (e. g. <OTOBO_CURRENT_UserFirstname>).

<OTOBO_TICKET_*>
Options of the ticket data (e. g. <OTOBO_TICKET_TicketNumber>, <OTOBO_TICKET_TicketID>, <OTOBO_TICKET_Queue>, <OTOBO_TICKET_State>).

<OTOBO_CUSTOMER_DATA_*>
Options of the current customer user data (e. g. <OTOBO_CUSTOMER_DATA_UserFirstname>).

<OTOBO_CONFIG_*>
Config options (e. g. <OTOBO_CONFIG_HttpType>).

Example salutation:

Dear <OTOBO_CUSTOMER_REALNAME>,
Thank you for your request.

2.23:

For example, the variable <OTOBO_CUSTOMER_DATA_UserLastname> expands to the customer's last name to be included in something like the following.

```
Dear <OTOBO_CUSTOMER_DATA_UserFirstname> <OTOBO_CUSTOMER_DATA_UserLastname>,

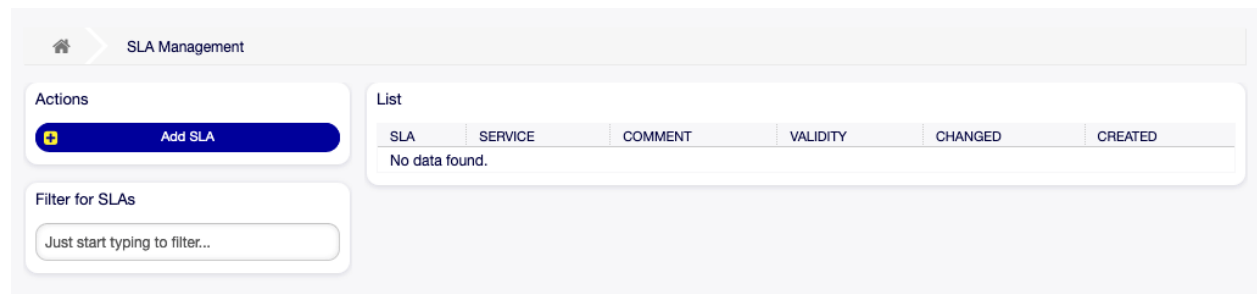
Dear Lisa Wagner,
```

2.7 SLA Management

Your organization must meet the time demands of your customers. Timely service matters. Response to questions, updates on issues, and solutions must be provided in an agreed amount of time. The agent must receive notification of possible breaches, to prevent ticket escalation.

OTOBO scales well with your needs and offers management of service level agreements (SLAs). OTOBO provides you with the possibility to create numerous service level agreements covering all of your service and customer need. Each SLA can cover multiple services and define the availability of service and escalation periods.

Use this screen to add service level agreements to the system. A fresh OTOBO installation doesn't contain any service level agreements by default. The service level agreement management screen is available in the Service Level Agreements module of the Ticket Settings group.



2.24: SLA Management

NOTE:

To use this feature, `Ticket::Service` must be activated in the `services` under the Administration group to be selectable in the ticket screens. You may click on the link in the warning message of the notification bar to directly jump to the configuration setting.

2.7.1 SLA Management

NOTE: SLA Management is only available in OTOBO 10.1 and later.

SLA Management

1. Add SLA
2. Edit SLA
3. Delete SLA

Add SLA

★ SLA:

Service:

Calendar:

Escalation - first response time (Notify by)
 (minutes): 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

Escalation - update time (minutes): (Notify by)
 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

Escalation - solution time (minutes): (Notify by)
 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

★ Validity:

Comment:

Save or Cancel

Figure 2.25: Add SLA

Figure 2.25: Add SLA

Procedure

1. Click **SLA** in the left navigation pane.
2. Click **Add**.
3. Fill in the required fields.

Figure 2.25: Add SLA

2.7.2 SLA

Procedure

SLA * SLA is a contract between the service provider and the customer.

SLA is a contract between the service provider and the customer.

SLA is a contract between the service provider and the customer.

SLA - SLA is a contract between the service provider and the customer.

Figure 2.25: Add SLA

Notify by Notify before time limit is reached (in percent).

Edit SLA

* SLA:

Service:

Calendar:

Escalation - first response time (Notify by)
(minutes): 0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

Escalation - update time (minutes): (Notify by)
0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

Escalation - solution time (minutes): (Notify by)
0 = no escalation - 24 hours = 1440 minutes - Only business hours are counted.

* Validity:

Comment:

or or

Figure 2.26: Edit SLA

Notify by - Notify before time limit is reached (in percent).

Notify by - Notify before time limit is reached (in percent).

Notify by - Notify before time limit is reached (in percent).

Validity: valid

Notify by - Notify before time limit is reached (in percent).

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

Notify by - Notify before time limit is reached (in percent).

Notify by - Notify before time limit is reached (in percent).

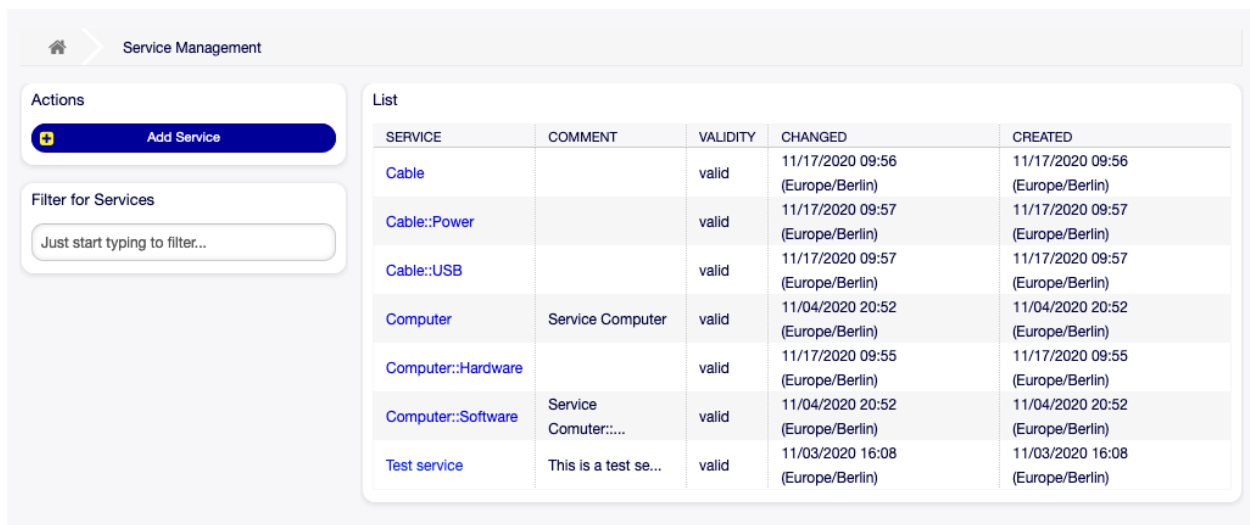
2.8 Services

OTOBO allows adding all services offered to your customers. These services may be later bound to SLAs to ensure a timely solution based on customer-specific agreements.

OTOBO allows adding all services offered to your customers. These services may be later bound to SLAs to ensure a timely solution based on customer-specific agreements.

Use this screen to add services to the system. A fresh OTOBO installation doesn't contain any services by default. The service management screen is available in the Services module of the Ticket Settings group.

Figure 2.8: Services



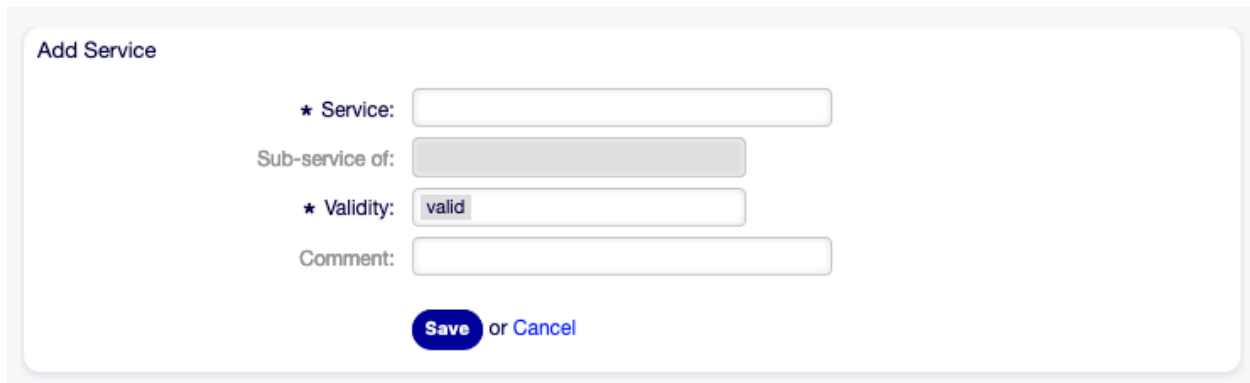
2.27: 画面

To use this feature, `Ticket::Service` must be activated in the `config` under the Administration group to be selectable in the ticket screens. You may click on the link in the warning message of the notification bar to directly jump to the configuration setting.

2.8.1 設定

手順

1. 設定画面を開く
2. 設定項目を確認
3. 設定を保存する



2.28: 画面

注: 設定項目は、設定画面の「設定項目」タブで確認してください。

手順

1. 設定画面を開く

- 2. [Queue](#)
- 3. [Queue](#) [Queue](#) [Queue](#) [Queue](#)

Add Service

★ Service:

Sub-service of:

★ Validity:

Comment:

[Save](#) or [Cancel](#)

2.29: Add Service

ACL: [ACL](#)

ACL: [ACL](#)

2.8.2 Queue

Queue

★ [Queue](#) [Queue](#) [Queue](#) [Queue](#)

Queue [Queue](#) [Queue](#) [Queue](#) [Queue](#)

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

Queue [Queue](#) [Queue](#) [Queue](#) [Queue](#)

ACL: [ACL](#)

2.9 Queue

Queue

OTOBO provides you with the same tools here, as with [Queue](#), to create a standardized communication form for any one of your queues. As defined in the Queue Settings: [Queue](#), [Queue](#), and [Queue](#) are combined to ensure a well formed standardized email communication.

Queue [Queue](#) [Queue](#) [Queue](#) [Queue](#)

Use this screen to add signatures to the system. A fresh OTOBO installation already contains a standard signature. The signature management screen is available in the Signatures module of the Ticket Settings group.



2.30: 画面

2.9.1 設定

設定

1. 設定
2. 設定
3. 設定

設定: 設定

設定

1. 設定
2. 設定
3. 設定

設定: 設定

設定: 設定

2.9.2 設定

設定

設定 * 設定

設定 * 設定

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



設定 設定

2.9.3 設定

Using variables in the text makes it possible to personalize messages. Variables, known as OTOBO tags, are replaced by OTOBO when generating the message. Find a list of available tags stems for this

Add Signature

* Name:

* Signature: 
Format | Font | Size | **A** | **A** | *I*_x | Source | 

* Validity:

Comment:

Save or Cancel

2.31: Add Signature

Edit Signature

★ Name:

★ Signature:

B I U S | | | | | |

Format | Font | Size | | | | |

Your Ticket-Team

<OTOBO_Agent_UserFirstname> <OTOBO_Agent_UserLastname>

--

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

--

★ Validity:

Comment:

Save or **Save and finish** or Cancel

2.32: Screenshot

resource at the bottom of both add and edit screens.

Hint

You can use the following tags:

<OTOBO_OWNER_*>
Ticket owner options (e. g. <OTOBO_OWNER_UserFirstname>).

<OTOBO_RESPONSIBLE_*>
Ticket responsible options (e. g. <OTOBO_RESPONSIBLE_UserFirstname>).

<OTOBO_CURRENT_*>
Options of the current user who requested this action (e. g. <OTOBO_CURRENT_UserFirstname>).

<OTOBO_TICKET_*>
Options of the ticket data (e. g. <OTOBO_TICKET_TicketNumber>, <OTOBO_TICKET_TicketID>, <OTOBO_TICKET_Queue>, <OTOBO_TICKET_State>).

<OTOBO_CUSTOMER_DATA_*>
Options of the current customer user data (e. g. <OTOBO_CUSTOMER_DATA_UserFirstname>).

<OTOBO_CONFIG_*>
Config options (e. g. <OTOBO_CONFIG_HttpType>).

Example signature:

Your OTOBO-Team

<OTOBO_CURRENT_UserFirstname> <OTOBO_CURRENT_UserLastname>

--

2.33: Signature

For example, the variable <OTOBO_CURRENT_UserFirstname> <OTOBO_CURRENT_UserLastname> expands to the agent’s first and last name allowing a template to include something like the following.

Best regards,

<OTOBO_CURRENT_UserFirstname> <OTOBO_CURRENT_UserLastname>

XXXXXXXXXXXX

Best regards,

Steven Weber

2.10 XXXX

XX: Rother OSS TODO: This feature will be included in one of the next OTOBO releases. If you need it beforehand, please contact sales@otrs.ch, we will find a solution.

An on-call duty should be alarmed about incidents on an email servers, therefore cannot get an email from OTOBO. Additionally, in the case where customers have no internet access, it’s imperative to ensure good contact.

OTOBO provides SMS as a cloud service and allows, as with email, management of this communication via templates.

XX

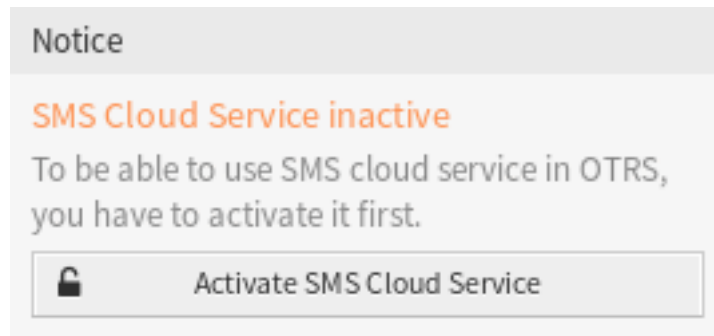
Use this screen to add SMS templates for use in communications. A fresh OTOBO installation doesn't contain any SMS templates by default. The SMS template management screen is available in the SMS Templates module of the Ticket Settings group.



2.34: XXXXXXXXXXXX

2.10.1 XXXXXXXX

XX: To be able to use SMS cloud service in OTOBO, you have to activate it first in XX module.



2.35: XXXXXXXX

XXXXXXXXXX

1. XXXXXXXXXXXX XXXXXXXX XX
2. XXXXXXXX
3. XX XX XX

XXXXXXXXXXXX

1. XXXXXXXXXXXXXXXXXXXXXXXX
2. XXXXXX
3. XX XX X XXXXXXXX XX

Add Template

★ Type:

★ Name:

★ Template:

Flash message:

Show message directly without user interaction and do not store it automatically (support may vary by device and provider).

★ Validity:

Comment:

or

2.36: Screenshot

Edit SMS Template

★ Type:

★ Name:

★ Template:

Your ticket was created with number
<OTRS_TICKET_TicketNumber>.

Flash message:

Show message directly without user interaction and do not store it automatically (support may vary by device and provider).

★ Validity:

Comment:

or

2.37: Screenshot

1. 2.

- 1.
- 2.

List						
TYPE	NAME	COMMENT	VALIDITY	CHANGED	CREATED	DELETE
Answer	Test		valid	10/16/2018 11:11 (Europe/Budapest)	10/16/2018 11:11 (Europe/Budapest)	

2.38:

:

2.10.2

*

*

: 918 160 153 160

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

2.10.3

Using variables in the text makes it possible to personalize messages. Variables, known as OTOBO tags, are replaced by OTOBO when generating the message. Find a list of available tags stems for this resource at the bottom of both add and edit screens.

For example, the variable <OTOBO_TICKET_TicketNumber> expands to the ticket number allowing an SMS template to include something like the following.

Ticket#<OTOBO_TICKET_TicketNumber> has been raised in <OTOBO_Ticket_Queue>.

Reference

You can use the following tags:

<OTRS_OWNER_*>

Ticket owner options (e. g. <OTRS_OWNER_UserFirstname>).

<OTRS_RESPONSIBLE_*>

Ticket responsible options (e. g. <OTRS_RESPONSIBLE_UserFirstname>).

<OTRS_CURRENT_*>

Options of the current user who requested this action (e. g. <OTRS_CURRENT_UserFirstname>).

<OTRS_TICKET_*>

Options of the ticket data (e. g. <OTRS_TICKET_TicketNumber>, <OTRS_TICKET_TicketID>, <OTRS_TICKET_Queue>, <OTRS_TICKET_State>).

<OTRS_TICKET_DynamicField_*>

Options of ticket dynamic fields internal key values (e. g. <OTRS_TICKET_DynamicField_TestField>, <OTRS_TICKET_DynamicField_TicketFreeText1>).

<OTRS_TICKET_DynamicField_*_Value>

Options of ticket dynamic fields display values, useful for Dropdown and Multiselect fields (e. g. <OTRS_TICKET_DynamicField_TestField_Value>, <OTRS_TICKET_DynamicField_TicketFreeText1_Value>).

<OTRS_CUSTOMER_DATA_*>

Options of the current customer user data (e. g. <OTRS_CUSTOMER_DATA_UserFirstname>).

<OTRS_CONFIG_*>

Config options (e. g. <OTRS_CONFIG_HttpType>).

Note: Create type templates only supports this smart tags: **<OTRS_CURRENT_*>** and **<OTRS_CONFIG_*>**

Example template:

```
The current ticket state is: "<OTRS_TICKET_State>"
Your mobile phone is: "<OTRS_CUSTOMER_UserMobile>"
```

2.39: 2.39

Ticket#2018101042000012 has been raised in Postmaster.

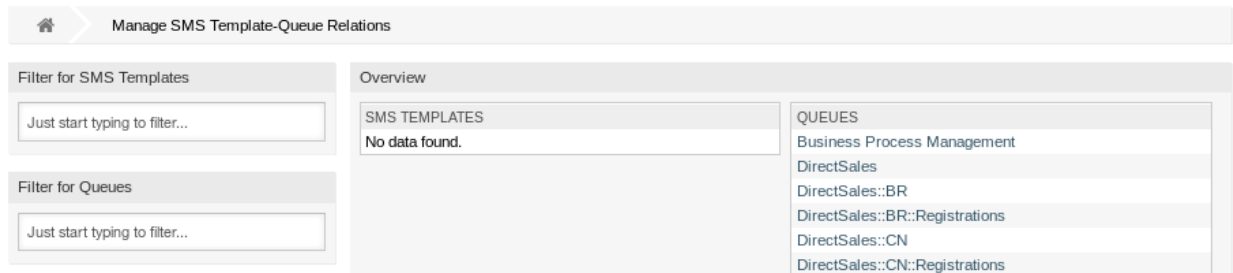
2.11 2.11.1

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

XX

OTOBO gives you the power to quickly assign the appropriate SMS templates to any queue, containing pertinent ticket information, ensuring this information reaches your customers and agents.

XX

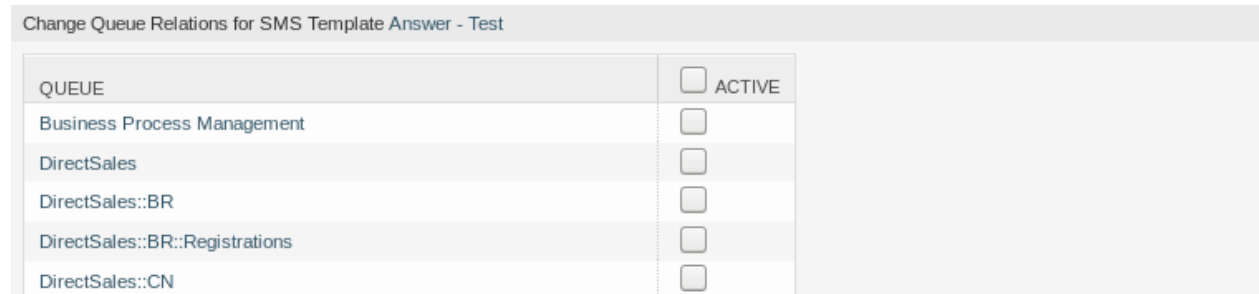


2.40: XXXXXXXXXXXXXXXXXXXX

2.11.1 2.11.1.1

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

1. XXX XXXX XXXXXXXXXXXXXXX
2. XXXXXXXXXXXXXXXXXXXXXXX
3. XXX XX X XXXXXXX XXXX



2.41: XXXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

1. XXX XX XXXXXXXXXXXXXXX

Use this screen to add states to the system. A fresh OTOBO installation contains several states by default. The state management screen is available in the States module of the Ticket Settings group.

The screenshot shows the 'State Management' interface. On the left, there are three panels: 'Actions' with a blue 'Add State' button, 'Filter for States' with a search input, and a 'Hint' box with instructions. The main area is a 'List' table with columns: NAME, TYPE, COMMENT, VALIDITY, CHANGED, and CREATED. The table lists various states like 'closed', 'successful', 'merged', 'new', 'open', 'pending auto', 'pending reminder', and 'removed'.

NAME	TYPE	COMMENT	VALIDITY	CHANGED	CREATED
closed	closed	Ticket is closed	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
successful	closed	...	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
closed	closed	Ticket is closed	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
unsuccessful	closed	...	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
merged	merged	State for merged	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
new	new	New ticket create...	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
open	open	Open tickets.	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
pending auto	pending auto	Ticket is pending...	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
close+	pending auto	Ticket is pending...	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
close-	pending auto	Ticket is pending...	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
pending reminder	pending reminder	Ticket is pending...	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
removed	removed	Customer removed ...	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)

2.43: State Management

2.12.1 Add State

Prerequisites:

1. OTOBO installation is up and running
2. User has permissions
3. User is logged in

The screenshot shows the 'Add State' form. It has four input fields: 'Name' (required), 'State type' (with 'closed' selected), 'Validity' (with 'valid' selected), and 'Comment'. At the bottom, there are 'Save' and 'Cancel' buttons.

2.44: Add State

Notes: This screen is only available in the OTOBO administration interface.

Prerequisites:

ACL

2.12.2

*

*

- closed-
- merged-
- new-
- open-
-
-
- removed-

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

2.12.3

- Daemon::SchedulerCronTaskManager::Task###TicketPendingCheck
- Ticket::StateAfterPending

2.13

OTOBO templates offer you a variety of ways to deal with standardizing communications and help to pre-define texts so that the customer always receives the same level and quality of service from all agents.

Use this screen to add templates for use in communications. A fresh OTOBO installation already contains a template by default. The template management screen is available in the Templates module of the Ticket Settings group.

>
Template Management

Actions

+ Add Template

Filter for Templates

Just start typing to filter...

Hint

A template is a default text which helps your agents to write faster tickets, answers or forwards.

Attention: Don't forget to add new templates to queues.

List

TYPE	NAME	ATTACHMENTS	COMMENT	VALIDITY	CHANGED	CREATED	DELETE
Answer	empty answer	0		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)	🗑
Answer	test answer	0		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)	🗑
Create	VIP customer	0	Auto response for VIP c...	valid	11/19/2020 14:59 (Europe/Berlin)	11/19/2020 14:59 (Europe/Berlin)	🗑

2.47: 2.47

2.13.1 2.13.1

2.13.1: 2.13.1

2.13.1.1

1. 2.13.1.1.1
2. 2.13.1.1.2
3. 2.13.1.1.3

2.13.1.2

1. 2.13.1.2.1
2. 2.13.1.2.2
3. 2.13.1.2.3

2.13.1.3

1. 2.13.1.3.1
2. 2.13.1.3.2

2.13.1: 2.13.1

2.13.2 2.13.2

2.13.2: 2.13.2

2.13.2.1

- 2.13.2.1.1
- 2.13.2.1.2

2.13.2.1.3 To be used for writing an email to a customer user or to someone else.

Add Template

* Type:

* Name:

Template:

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

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

Attachments:

* Validity:

Comment:

Save or Cancel

Figure 2.48: Add Template

Edit Template

* Type:

* Name:

Template:

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

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

Attachments:

* Validity:

Comment:

Save or **Save and finish** or Cancel

2.49: 00000000

List

TYPE	NAME	ATTACHMENTS	COMMENT	VALIDITY	CHANGED	CREATED	DELETE
Answer	empty answer	0		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)	
Answer	test answer	0		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)	
Create	VIP customer	0	Auto response for VIP c...	valid	11/19/2020 14:59 (Europe/Berlin)	11/19/2020 14:59 (Europe/Berlin)	

2.50: 00000000

Reference

You can use the following tags:

<OTOBO_AGENT_SUBJECT[20]>

To get the first 20 characters of the subject of the current/latest agent article (current for Answer and Forward, latest for Note template type). This tag is not supported for other template types.

<OTOBO_AGENT_BODY[5]>

To get the first 5 lines of the body of the current/latest agent article (current for Answer and Forward, latest for Note template type). This tag is not supported for other template types.

<OTOBO_CUSTOMER_SUBJECT[20]>

To get the first 20 characters of the subject of the current/latest article (current for Answer and Forward, latest for Note template type). This tag is not supported for other template types.

<OTOBO_CUSTOMER_BODY[5]>

To get the first 5 lines of the body of the current/latest article (current for Answer and Forward, latest for Note template type). This tag is not supported for other template types.

<OTOBO_OWNER_*>

Ticket owner options (e. g. <OTOBO_OWNER_UserFirstname>).

<OTOBO_RESPONSIBLE_*>

Ticket responsible options (e. g. <OTOBO_RESPONSIBLE_UserFirstname>).

<OTOBO_CURRENT_*>

Options of the current user who requested this action (e. g. <OTOBO_CURRENT_UserFirstname>).

<OTOBO_TICKET_*>

Options of the ticket data (e. g. <OTOBO_TICKET_TicketNumber>, <OTOBO_TICKET_TicketID>, <OTOBO_TICKET_Queue>, <OTOBO_TICKET_State>).

<OTOBO_TICKET_DynamicField_*>

Options of ticket dynamic fields internal key values (e. g. <OTOBO_TICKET_DynamicField_TestField>, <OTOBO_TICKET_DynamicField_TicketFreeText1>).

<OTOBO_TICKET_DynamicField_*_Value>

Options of ticket dynamic fields display values, useful for Dropdown and Multiselect fields (e. g. <OTOBO_TICKET_DynamicField_TestField_Value>, <OTOBO_TICKET_DynamicField_TicketFreeText1_Value>).

<OTOBO_CUSTOMER_DATA_*>

Options of the current customer user data (e. g. <OTOBO_CUSTOMER_DATA_UserFirstname>).

<OTOBO_CONFIG_*>

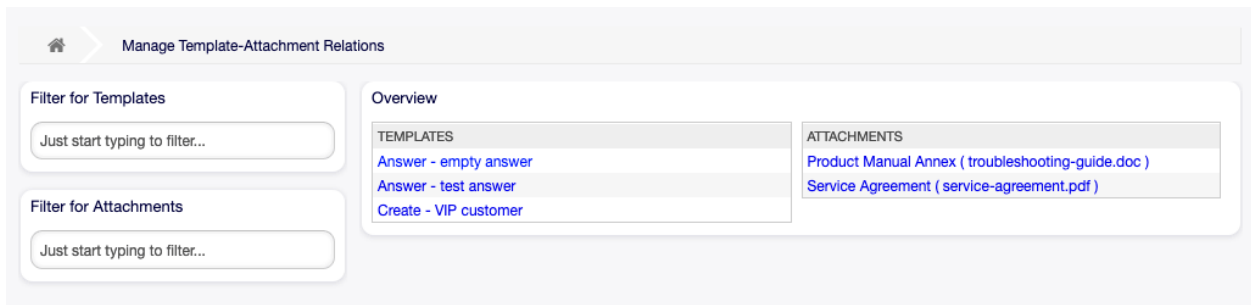
Config options (e. g. <OTOBO_CONFIG_HttpType>).

Note: Create type templates only supports this smart tags: <OTOBO_CURRENT_*> and <OTOBO_CONFIG_*>

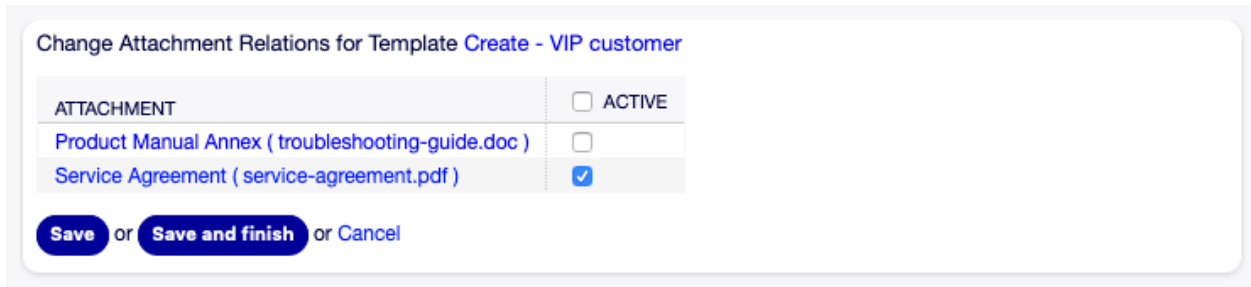
Example template:

```
The current ticket state is: "<OTOBO_TICKET_State>"
Your email address is: "<OTOBO_CUSTOMER_UserEmail>"
```

2.51: 10.1

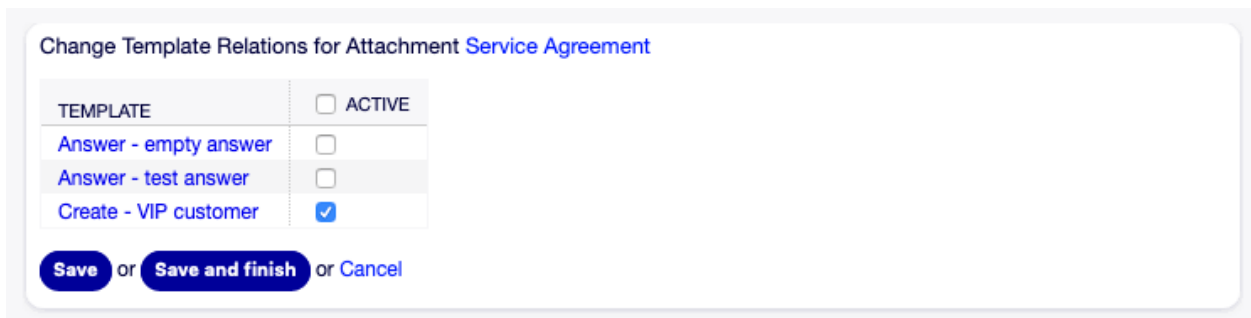


2.52: 画面



2.53: 画面

3. 画面を操作して



2.54: 画面

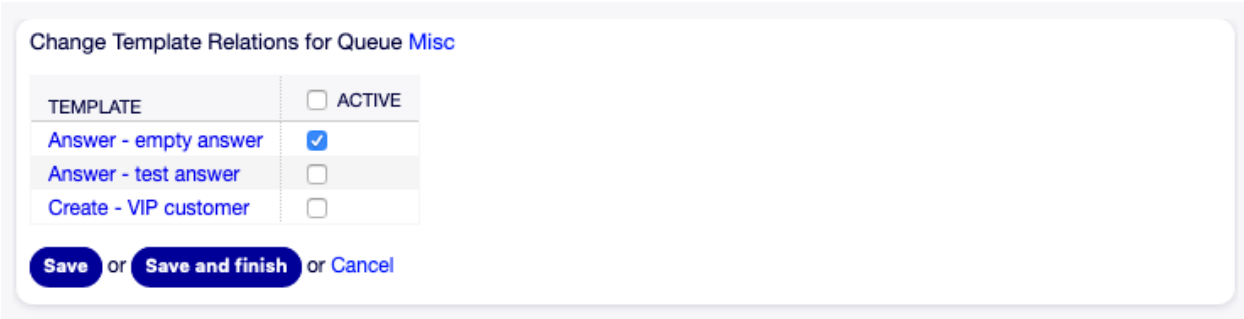
画面: 画面

画面を操作して

画面: 画面

2.15 画面

画面を操作して



2.57: Screenshot

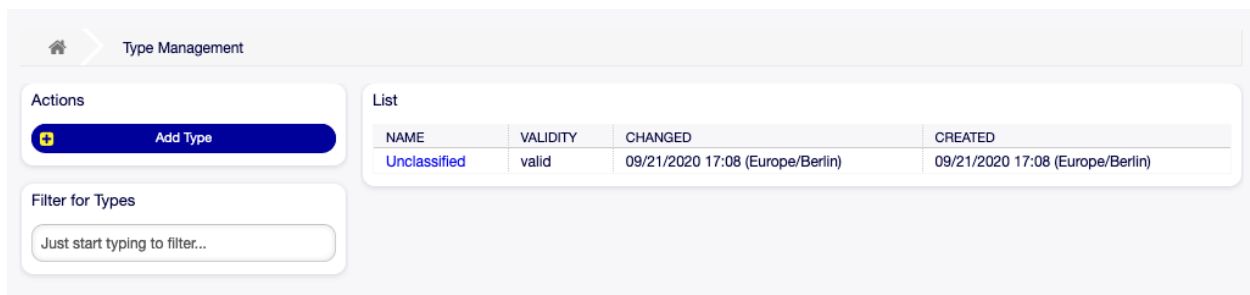
: Screenshot

2.16

Good KPIs (Key Performance Indicators) require knowing the type of work your organization performs. Not all tasks take the same amount of effort even when performed by the same team. Creating a queue structure for this purpose can be overpowered due to the amount of configuration required to create and manage a queue.

OTOBO provisions for KPIs with minimal overhead using ticket types. Typical types used in IT service desks are unclassified, incident and problem. You can quickly define new types with ease.

Use this screen to add types to the system. A fresh OTOBO installation contains an unclassified type by default. The type management screen is available in the Types module of the Ticket Settings group.



2.58: Screenshot

: Ticket : : Type must first be activated via under the Administration group to be selectable in the ticket screens. You may click on the link in the warning message to directly jump to the configuration setting.



2.59: Screenshot

2.16.1 2.16.1

2.16.1.1

1. 2.16.1.1.1
2. 2.16.1.1.2
3. 2.16.1.1.3

Add Type

* Name:

* Validity:

Save or **Cancel**

2.60: 2.60

2.60: 2.60

2.16.1.2

1. 2.16.1.2.1
2. 2.16.1.2.2
3. 2.16.1.2.3

Edit Type

* Name:

* Validity:

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

2.61: 2.61

2.61: 2.61

2.16.2 2.16.2

2.16.2.1

2.16.2.1.1

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

Create Administrative Message

* From:

Send message to users:

Send message to group members:

Group members need to have ro
permission: rw

Send message to role members:

Also send to customers in groups:

* Subject:

* Body:

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

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

3.1: Create Administrative Message

With these radio buttons can be selected, if a group member needs read-only or read-write permissions to receive the message.

Send message to role members One or more can be selected in this field, to whose members the message will be sent.

Also send to customers in groups Select this checkbox to send the message also for customers in groups.

: This option is available only, if CustomerGroupSupport setting is enabled.

*

*

3.2

-
-
-

OTOB appointment notifications satisfies this need. Here an administrator can easily set notifications with general rules, including trigger events and filters. Afterward, appointments fitting the bill notify the correct users at the correct time.

Use this screen to add appointment notifications to the system. In a fresh OTOB installation an appointment reminder notification is already added by default. The appointment notification management screen is available in the Appointment Notifications module of the Communication & Notifications group.

3.2.1

1. Appointment Settings
2. Appointment Notification Settings
3. Appointment

1. Appointment
2. Appointment Notification Settings
3. Appointment

1. Appointment
2. Appointment

Appointment Notification Management

Actions

[Add Notification](#)

[Export Notifications](#)

Filter for Notifications

Just start typing to filter...

Configuration Import

Here you can upload a configuration file to import appointment notifications to your system. The file needs to be in .yml format as exported by the appointment notification module.

Keine Datei ausgewählt.

Overwrite existing notifications?

[Import Notification configuration](#)

List

NAME	COMMENT	VALIDITY	CHANGED	CREATED	EXPORT	COPY	DELETE
Appointment reminder notification		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			

3.2: Appointment Notification Management

List

NAME	COMMENT	VALIDITY	CHANGED	CREATED	EXPORT	COPY	DELETE
Appointment reminder notification		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			

3.3: Appointment Notification Management Table

Exporting Notifications

1. Open the OTOBO console
2. Click on the `Export_Notification.yml` link

Importing Notifications

1. Click on the `Import` link
2. Upload the `.yml` file
3. Click on the `Import` button
4. The notifications are imported

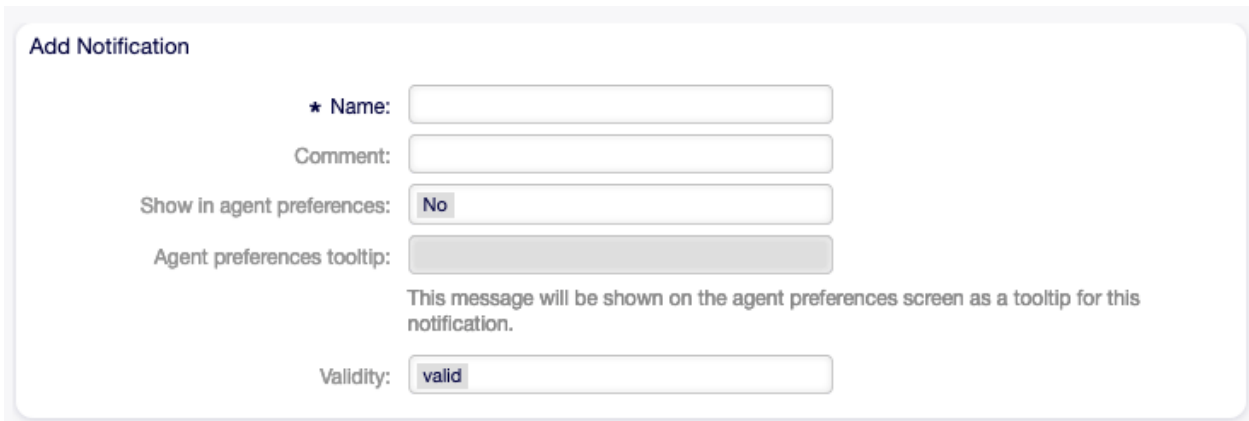
3.2.2 Notifications

Notifications are used to send messages to agents.

For example:

For an example, see the default appointment reminder notification which is included in a fresh OTOBO installation.

Notification Form



Add Notification

*** Name:**

Comment:

Show in agent preferences:

Agent preferences tooltip:

This message will be shown on the agent preferences screen as a tooltip for this notification.

Validity:

Figure 3.4: Notification Form

* The `validity` field is used to control the use of the resource.

The `validity` field can be set to `valid`, `invalid`, or `invalid-temporarily`.

The `validity` field is used to control the use of the resource.

The `validity` field can be set to `valid`, `invalid`, or `invalid-temporarily`.

The `validity` field can be set to `valid`, `invalid`, or `invalid-temporarily`.

The `validity` field can be set to `valid`, `invalid`, or `invalid-temporarily`.

The `validity` field can be set to `valid`, `invalid`, or `invalid-temporarily`.

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

Appointment notifications

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

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

3.5: Appointment notifications

Events

▼ Events

★ Event:

Here you can choose which events will trigger this notification. An additional appointment filter can be applied below to only send for appointments with certain criteria.

3.6: Appointment events

Event *

AppointmentCreate

AppointmentUpdate

AppointmentDelete

AppointmentNotification This is a special appointment event that will be executed by the OTOBO daemon in time. If an appointment contains a date/time value for notifications, as already described in this documentation, and such a notification date is reached, the OTOBO daemon will execute this kind of event for every related appointment separately.

CalendarCreate

CalendarUpdate

Appointment Filter

▼ Appointment Filter

Calendar:

Title:

Location:

Resource:

3.7: Appointment filter

Appointment filter

- Send to all agents with (at least) read permission for the appointment (calendar)
- Send to these agents:
- Send to all group members (agents only):
- Send to all role members:

Send on out of office:

▼ Recipients

Send to:

Send to these agents:

Send to all group members (agents only):

Send to all role members:

Send on out of office: Also send if the user is currently out of office.

Once per day: Notify user just once per day about a single appointment using a selected transport.

Figure 3.8: Recipients - Agents

Send on out of office:

- Send to all agents with (at least) read permission for the appointment (calendar)
- Send to these agents:
- Send to all group members (agents only):

Send to all role members:

Send on out of office:

Once per day:

Notify user just once per day about a single appointment using a selected transport.

Notify users just once per day about a single appointment using a selected transport. If this is the first notification about an appointment, then the notification will be sent. If a notification was already sent before and this option is checked, the OTOBO daemon will check the time the last notification was sent. If there was no notification sent in the last 24 hours, the notification will be sent again.

Send on out of office:

Once per day: Notify user just once per day about a single appointment using a selected transport.

Active by default in agent preferences This is the default value for assigned recipient agents who didn't make a choice for this notification in their preferences yet. If the box is enabled, the notification will be sent to such agents.

Additional recipients can be added here. Use comma or semicolon to separate the email addresses.

▼ Notification Methods

These are the possible methods that can be used to send this notification to each of the recipients. Please select at least one method below.

Email

Enable this notification method:

Active by default in agent preferences: This is the default value for assigned recipient agents who didn't make a choice for this notification in their preferences yet. If the box is enabled, the notification will be sent to such agents.

Additional recipient email addresses:

Article visible for customer: An article will be created if the notification is sent to the customer or an additional email address.

Email template: Use this template to generate the complete email (only for HTML emails).

Enable email security: PGP and SMIME not enabled.

Email security level:

If signing key/certificate is missing:

If encryption key/certificate is missing:

3.9: Notification Methods - Email

▼ Tag Reference

Notifications are sent to an agent.
You can use the following tags:

<OTOBO_APPOINTMENT_TITLE[20]>

To get the first 20 character of the appointment title.

<OTOBO_APPOINTMENT_*>

To get the appointment attribute (e. g. <OTOBO_APPOINTMENT_APPOINTMENTID>, <OTOBO_APPOINTMENT_STARTTIME>, <OTOBO_APPOINTMENT_DESCRIPTION>).

<OTOBO_CALENDAR_*>

To get the calendar attribute (e. g. <OTOBO_CALENDAR_CALENDARID>, <OTOBO_CALENDAR_CALENDARNAME>, <OTOBO_CALENDAR_COLOR>).

<OTOBO_*> or <OTOBO_NOTIFICATION_RECIPIENT_*>

Attributes of the recipient user for the notification (e. g. <OTOBO_UserFullname> or <OTOBO_NOTIFICATION_RECIPIENT_UserFullname>).

<OTOBO_CONFIG_*>

Config options (e. g. <OTOBO_CONFIG_HttpType>).

Example notification:

Subject: `Reminder: <OTOBO_APPOINTMENT_TITLE>`

Text:

```
Hi <OTOBO_NOTIFICATION_RECIPIENT_UserFirstname>,

appointment "<OTOBO_APPOINTMENT_TITLE>" has reached its notification
time.

Description: <OTOBO_APPOINTMENT_DESCRIPTION>
Location: <OTOBO_APPOINTMENT_LOCATION>
Calendar: <OTOBO_CALENDAR_CALENDARNAME>
Start date: <OTOBO_APPOINTMENT_STARTTIME>
End date: <OTOBO_APPOINTMENT_ENDTIME>
All-day: <OTOBO_APPOINTMENT_ALLDAY>
Repeat: <OTOBO_APPOINTMENT_RECURRING>
```

3.11: 通知の例

For example, the variable <OTOBO_APPOINTMENT_TITLE[20]> expands to the first 20 characters of the title allowing a template to include something like the following.

```
Title: <OTOBO_APPOINTMENT_TITLE[20]>
```

XXXXXXXXXXXX

```
Title: Daily meeting in the...
```

3.3 通信ログ

通信ログは、クライアントとサーバー間の通信を記録するためのモジュールです。メールの送信と受信、クライアントとサーバー間の接続を記録します。

OTOBO introduces the Communication Log module. It's designed to track the communication: building and spooling the mail and the connection between client and server.

通信ログは、クライアントとサーバー間の通信を記録するためのモジュールです。メールの送信と受信、クライアントとサーバー間の接続を記録します。

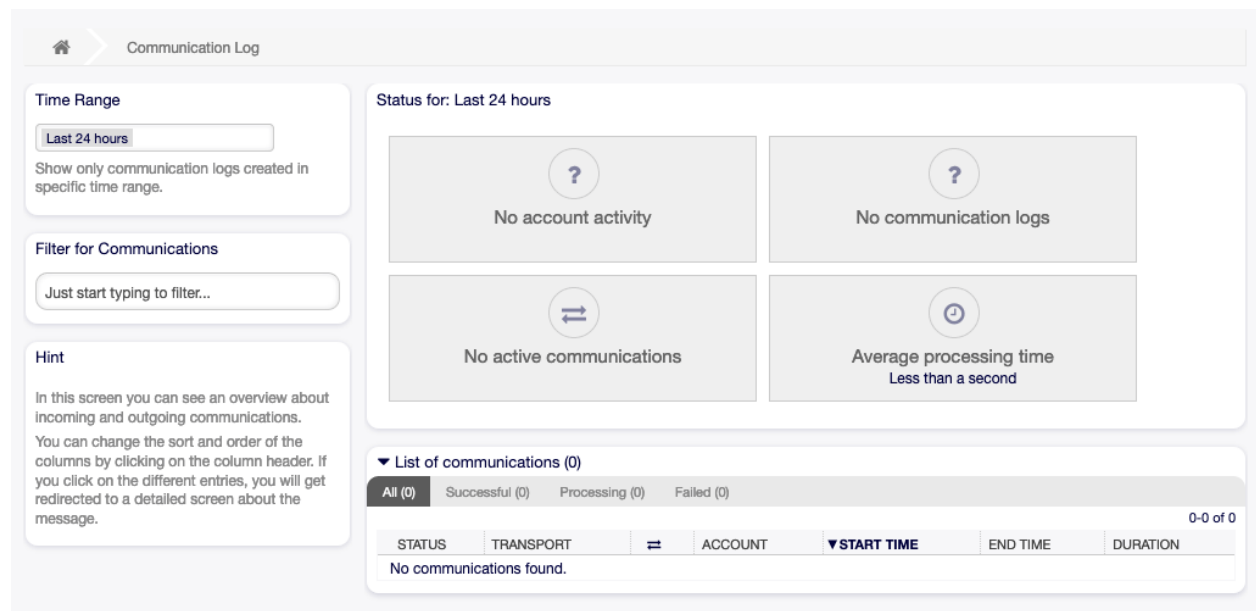


図 3.12: 通信ログ

3.3.1 通信ログの表示

通信ログは、クライアントとサーバー間の通信を記録するためのモジュールです。

通信ログは、クライアントとサーバー間の通信を記録するためのモジュールです。

通信ログは、クライアントとサーバー間の通信を記録するためのモジュールです。


通信ログは、クライアントとサーバー間の通信を記録するためのモジュールです。

通信ログは、クライアントとサーバー間の通信を記録するためのモジュールです。

通信ログは、クライアントとサーバー間の通信を記録するためのモジュールです。


通信ログは、クライアントとサーバー間の通信を記録するためのモジュールです。

Status for: Last 1 hour




Failing accounts

Number of accounts with problems: 2




Failing communications

Number of reported problems: 6



No active communications




Average processing time


4 seconds

▼ List of communications (12)

All (12)
Successful (6)
Processing (0)
Failed (6)

1-6 of 6

STATUS	TRANSPORT		ACCOUNT	▼ START TIME	END TIME
✘	Email	←	mail.example.com / test (IMAP)	11/24/2020 14:20:16 (Europe/Berlin)	11/24/2020 14:20:21 (Europe/Berlin)
✘	Email	←	mail.example.com / test (IMAP)	11/24/2020 14:10:06 (Europe/Berlin)	11/24/2020 14:10:12 (Europe/Berlin)
✘	Email	←	mail.example.com / test (IMAP)	11/24/2020 14:00:17 (Europe/Berlin)	11/24/2020 14:00:23 (Europe/Berlin)
✘	Email	←	mail.example.com / test (IMAP)	11/24/2020 13:50:02 (Europe/Berlin)	11/24/2020 13:50:08 (Europe/Berlin)
✘	Email	←	mail.example.com / test (IMAP)	11/24/2020 13:40:12 (Europe/Berlin)	11/24/2020 13:40:18 (Europe/Berlin)
✘	Email	←	mail.example.com / test (IMAP)	11/24/2020 13:30:03 (Europe/Berlin)	11/24/2020 13:30:08 (Europe/Berlin)

3.13: 

▼ Communication Log Overview (1)

STATUS	▲ TYPE	≡	ACCOUNT	START TIME	END TIME
✘	Connection	←	mail.example.com / test (IMAP)	11/24/2020 14:10:06 (Europe/Berlin)	11/24/2020 14:10:12 (Europe/Be

▼ Communication Log Details (2)

▲ #	PRIORITY	MODULE	INFORMATION	CREATED
1	🔔	Kernel::System::MailAccount::IMAP	Open connection to 'mail.example.com' (test).	11/24/2020 14:10:07 (Europe/Berlin)
2	✘	Kernel::System::MailAccount::IMAP	IMAP: Can't connect to mail.example.com	11/24/2020 14:10:12 (Europe/Berlin)

3.14: Communication Log

Communication Log Overview (1)

Communication Log Details (2)

Error

3.4 Email

The main channel of communication with the customers is often email. An organization consists of multiple departments or teams. Email addresses differ for each group which is servicing your customers. You may have the following:

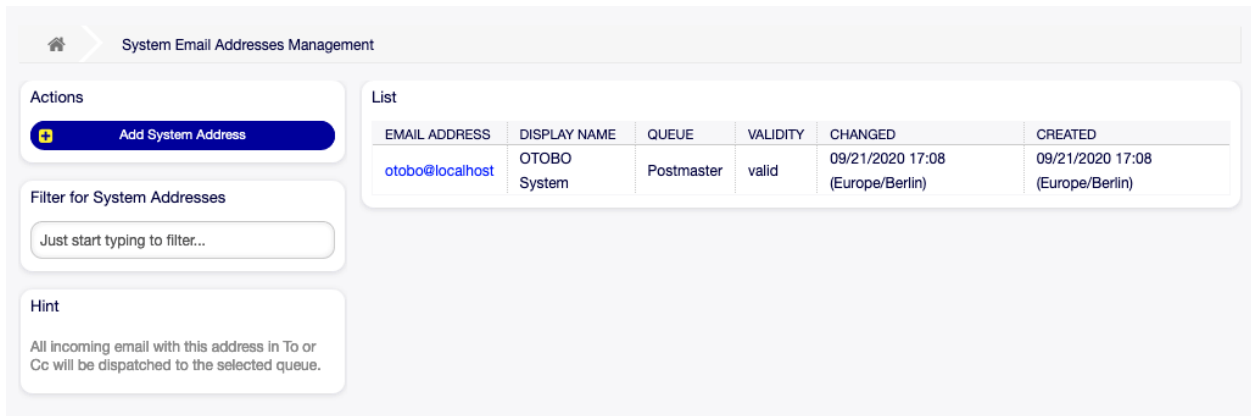
```
support@example.org
hr@exapmle.org
sales@example.org
```

These addresses are just some examples, and you may have many more. Use these channels to receive and send messages, and in mail clients, one can often send with the wrong address.

OTOBO manages as many email addresses for your teams as needed. All your email addresses, whether for sending or receiving, are kept and configured nicely in one place. In the queue settings, the correct address is always chosen preventing that someone working in multiple roles sends an email out with the wrong account.

To enable OTOBO to send emails, you need a valid email address to be used by the system. OTOBO is capable of working with multiple email addresses, since many support installations need to use more than one. A queue can be linked to many email addresses, and vice versa. The address used for outgoing messages from a queue can be set when the queue is created.

Use this screen to add system email addresses to the system. An email address is already added to the system at installation time of OTOBO. The email address management screen is available in the Email Addresses module of the Communication & Notifications group.

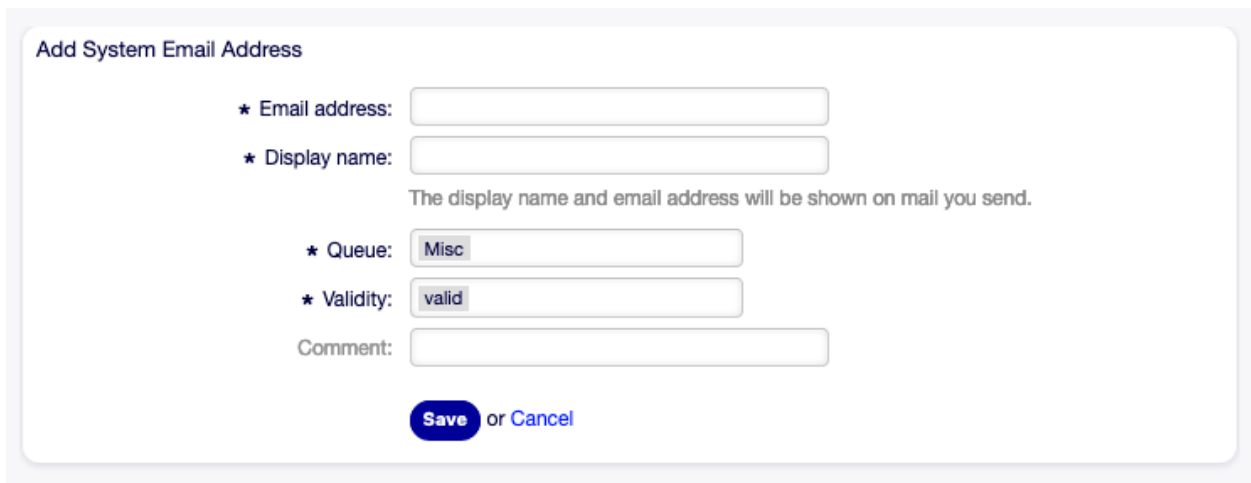


3.15: System Email Addresses Management

3.4.1 Adding System Email Address

Procedure:

1. Click on the **System Email Addresses** link in the left sidebar.
2. Click on the **Add System Address** button.
3. Fill in the required fields and click on the **Save** button.



3.16: Add System Email Address

NOTE: System email addresses are used for internal communication and should not be used for external communication.

NOTE: Once an email address is added and set to valid, OTOBO cannot send an email to this address. This prevents loopbacks which could crash your system. If you need to transfer information between

departments please use the ticket split option in the article menu. This will allow you to create a new ticket to another team for assigning a task, for example.

Mark | Print | Split | Forward | Reply

3.17:

- 1.
- 2.
- 3.

Edit System Email Address

* Email address:

* Display name:

The display name and email address will be shown on mail you send.

* Queue:

* Validity:

This system address cannot be set to invalid, because it is used in one or more queue(s) or auto response(s).

Comment:

or
 or
 [Cancel](#)

3.18:

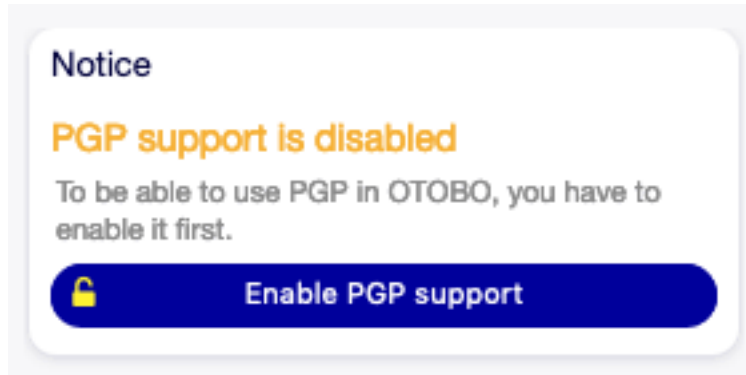
3.4.2

*

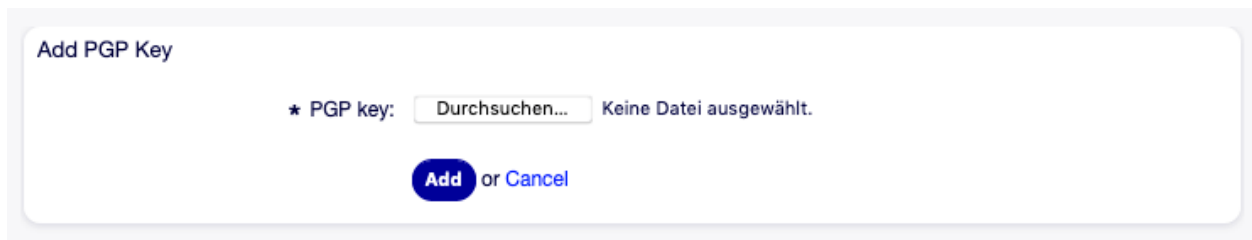
*

*

Mail Account Settings



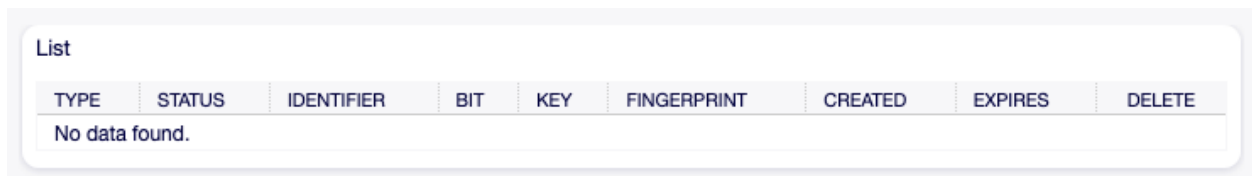
3.21: PGP



3.22: PGP

PGP

1. PGP
2. 3 3 3



3.23: PGP

: PGP PGP

3.5.2 PGP

Core → Crypt → PGP

3.6

PGP

OTOBO uses so-called postmaster filters to read the emails envelope and take further action. Depending upon, for example, a subject or sender, an email bound for the service desk could land in a sub-queue or be redirected to a completely different team to create transparency and give your customer the fastest service possible.

Figure 3.24: PostMaster Filter Management interface

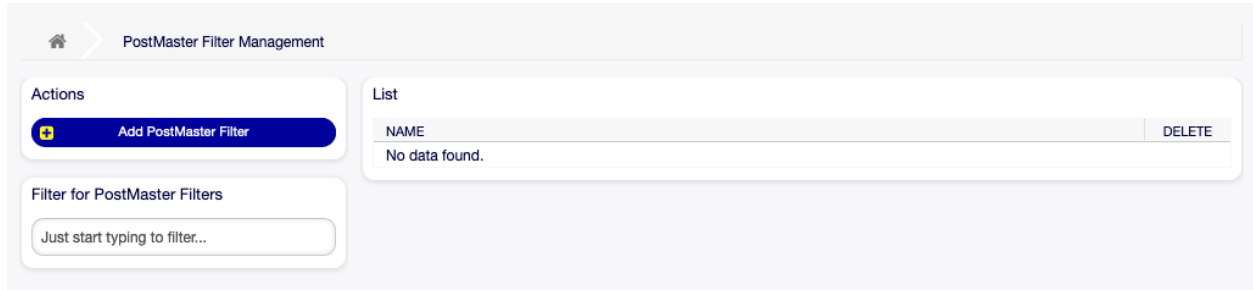


Figure 3.24: PostMaster Filter Management interface

3.6.1 PostMaster Filters

Note: When adding or editing a postmaster filter, please keep in mind that they are evaluated in ASCII-betical order by name.

Prerequisites

1. User has permissions to manage filters
2. Filter name is unique
3. Filter name is not empty

Procedure

1. Click on the 'Add PostMaster Filter' button
2. Enter the filter name
3. Click on the 'Save' button

Result

1. The filter is added to the list
2. The filter is visible in the list

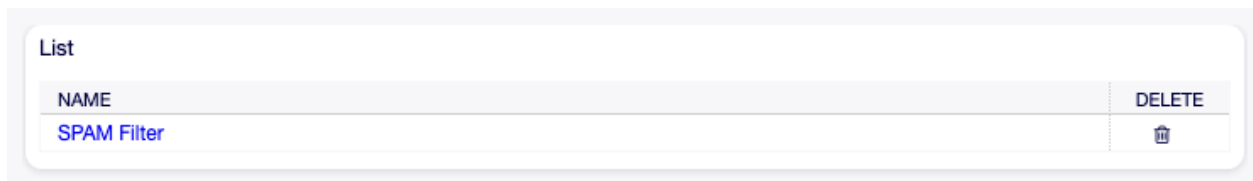


Figure 3.25: PostMaster Filter Management interface

Note: The filter name is case-sensitive.

3.6.2 Filter Rules

Filter rules are used to filter incoming mail based on header information.

3.26: Filter Rule Configuration

Filter rules are used to filter incoming mail based on header information.

3.27: Add PostMaster Filter Configuration

* Filter rules are evaluated in ASCIIbetical order. This setting defines the evaluation of the subsequent postmaster filters.

When adding or editing one of the postmaster filters, remember multiple filters may apply to a single mail. Rules are executed and sorted by the ASCII value of the names. Based on the sorted order in the overview, they are applied from top to bottom. Look at the [ASCII table](#) to see how to sort your names based on the ASCIIbetical order.

* Postmaster filters are evaluated in ASCIIbetical order. This setting defines the evaluation of the subsequent postmaster filters.

Filter rules are used to filter incoming mail based on header information.

Filter rules are used to filter incoming mail based on header information.

Filter rules are used to filter incoming mail based on header information.

Filter rules are used to filter incoming mail based on header information.

Search header field ... for value Select a mail header or an X-OTOBO header from the first drop-down list, and enter a value as search term for the selected mail header to the second field. Even regular expressions can be used for extended pattern matching.

A list of mail header entries can be found in [RFC5322](#). It is also possible to define X-OTOBO headers as filter condition. The different X-OTOBO headers and their meaning are the following:

X-OTOBO-AttachmentCount Filter incoming mail based on the number of attachments.

\$Unit can be s (seconds), m (minutes), h (hours) or d (days). Only one unit can be specified. Examples of valid settings: +50s (pending in 50 seconds), +30m (30 minutes), +12d (12 days).

Example: +1d 12h +36h

X-OTOBO-Title

X-OTOBO-Type

These headers must be manually injected into the mail by means not provided for by OTOBO. OTOBO only accepts X-OTOBO headers from trusted sources.

Example:

Mail Account Settings

Example

Example

Figure 3.29: Set Email Headers - Configuration

Example

Set email header ... with value Select an X-OTOBO header from the first drop-down list, and add a value to the second field that should be set as value of the selected X-OTOBO header.

Example:

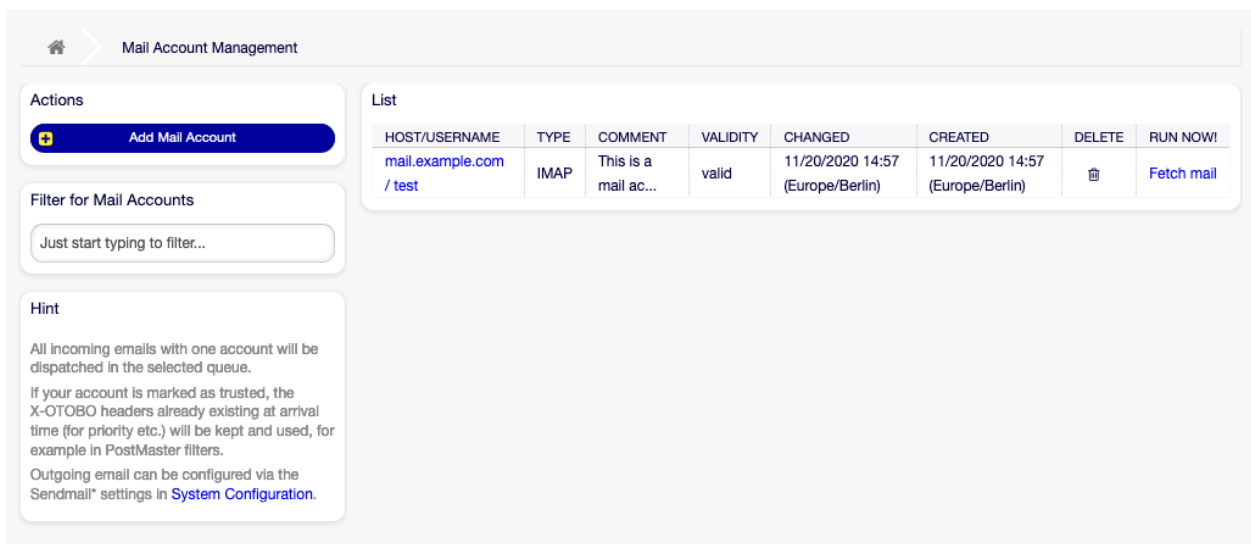
The X-OTOBO headers are already described above.

3.7

Example

OTOBO eases setup for email mailboxes. OTOBO manages polling one or multiple email mailboxes of any internet standard type.

Example



3.30: Mail Account Management

When fetching mail, OTOBO deletes the mail from the POP or IMAP server. There is no option to also keep a copy on the server. If you want to retain a copy on the server, you should create forwarding rules on your mail server. Please consult your mail server documentation for details.

3.7: Mail Account Management

All data for the mail accounts are saved in the OTOBO database. The `bin/otobo.Console.pl Maint::PostMaster::MailAccountFetch` command uses the settings in the database and fetches the mail. You can execute it manually to check if all your mail settings are working properly.

On a default installation, the mail is fetched every 10 minutes when the OTOBO daemon is running.

3.7.1 Mail Account Management

Mail Account Management

1. Add Mail Account
2. Edit Mail Account
3. Delete Mail Account

Mail Account Management

1. Add Mail Account
2. Edit Mail Account
3. Delete Mail Account

Mail Account Management

1. Add Mail Account
2. Delete Mail Account

Add Mail Account

* Type:

* Username:

* Password:

* Host:
Example: mail.example.com

IMAP Folder:
Only modify this if you need to fetch mail from a different folder than INBOX.

* Trusted:

* Dispatching:

* Validity:

Comment:

Save or Cancel

3.31: Add Mail Account

Edit Mail Account

* Type:

* Username:

* Password:

* Host:
Example: mail.example.com

IMAP Folder:
Only modify this if you need to fetch mail from a different folder than INBOX.

* Trusted:

* Dispatching:

* Validity:

Comment:

Save or **Save and finish** or Cancel

3.32: Edit Mail Account

HOST/USERNAME	TYPE	COMMENT	VALIDITY	CHANGED	CREATED	DELETE	RUN NOW!
mail.example.com / test	IMAP	This is a mail ac...	valid	11/20/2020 14:57 (Europe/Berlin)	11/20/2020 14:57 (Europe/Berlin)		Fetch mail

3.33: Screenshot of the List table

3.7.2: Screenshot of the IMAP configuration page

3.7.2 IMAP

Configuration options for IMAP

Options for IMAP:

- IMAP
- IMAPS
- IMAPTLS
- POP3
- POP3S
- POP3TLS

Options for IMAP:

Options for IMAP:

Options for IMAP:

IMAP configuration options

Trusted * If Yes is selected, any X-OTOBO headers attached to an incoming message are evaluated and executed. Because the X-OTOBO header can execute some actions in the ticket system, you should set this option to Yes only for known senders.

Options:

The X-OTOBO headers are explained in the filter conditions of [Filter Conditions](#).

Dispatching * Configuration options for dispatching

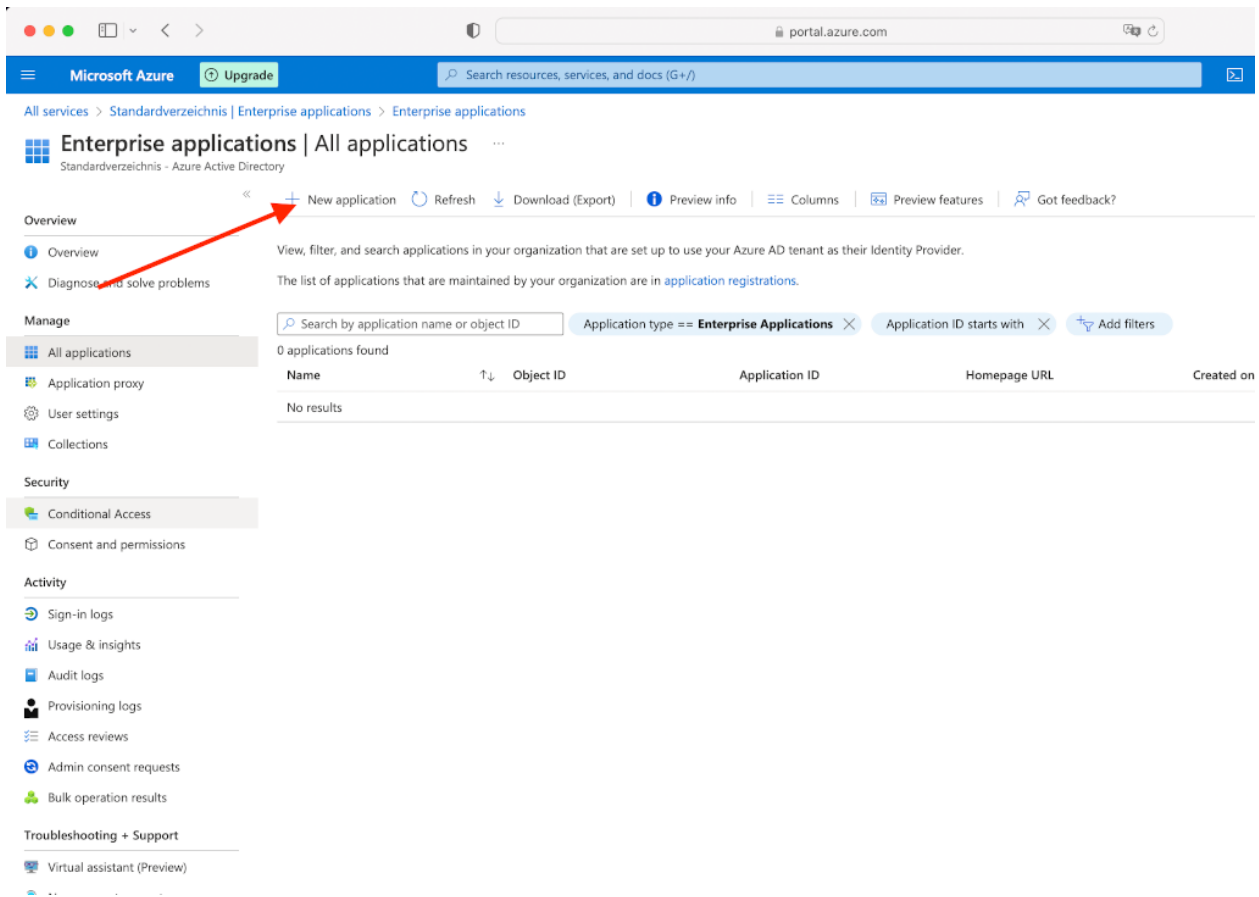
Options for To:([Name](#))
Options for To:([Name](#))
Options for To:([Name](#))
Raw

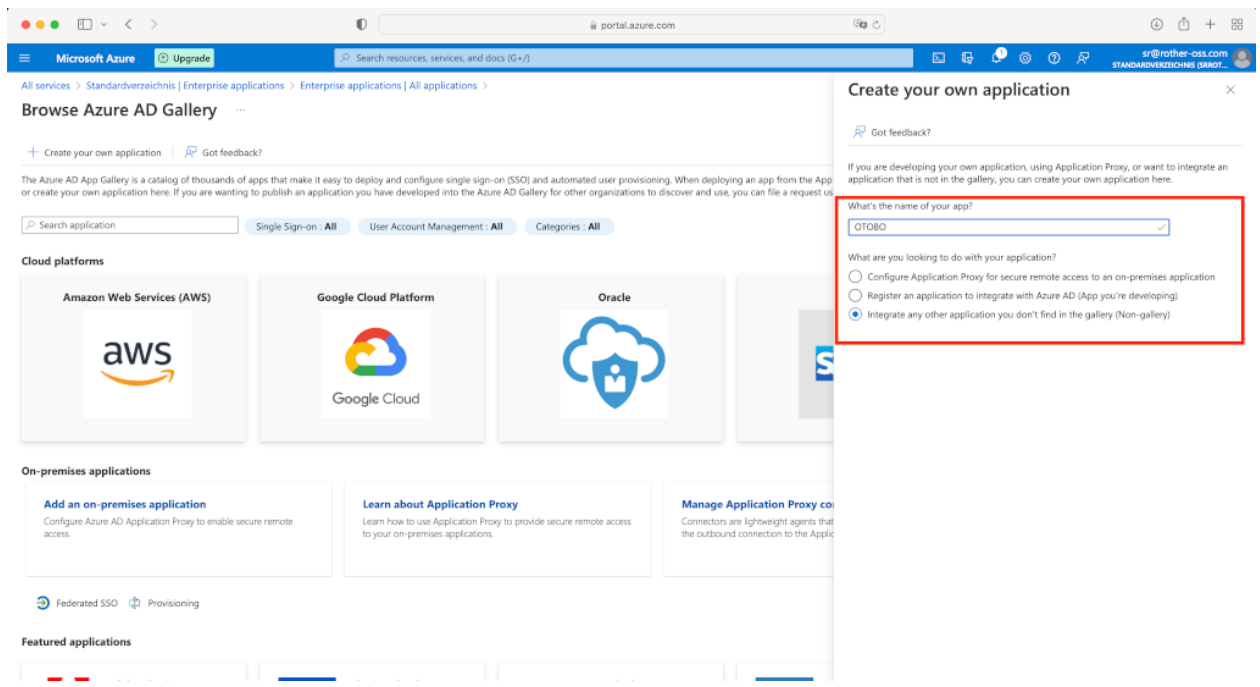
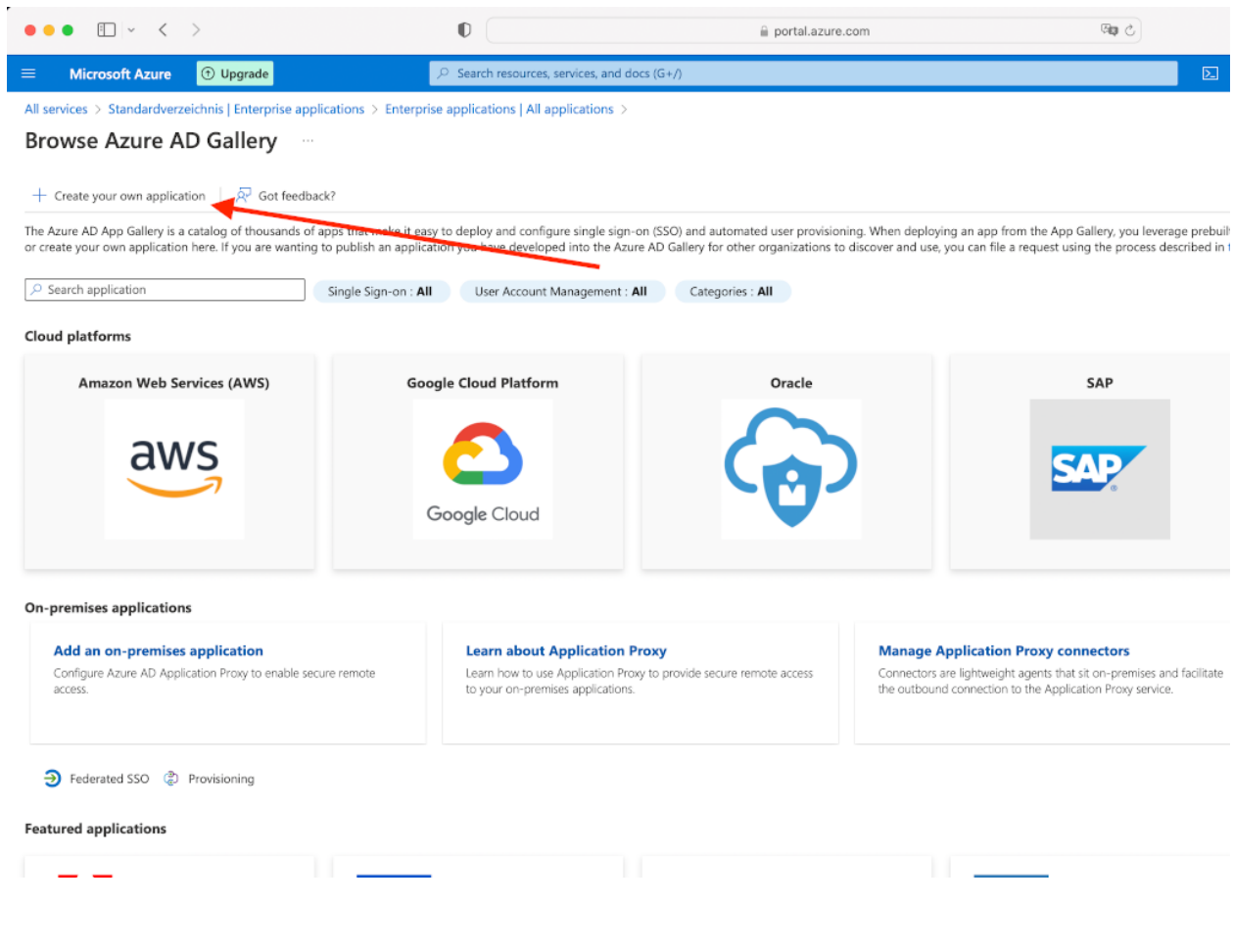
Options:

The postmaster default queue can be changed in system configuration setting PostmasterDefaultQueue.

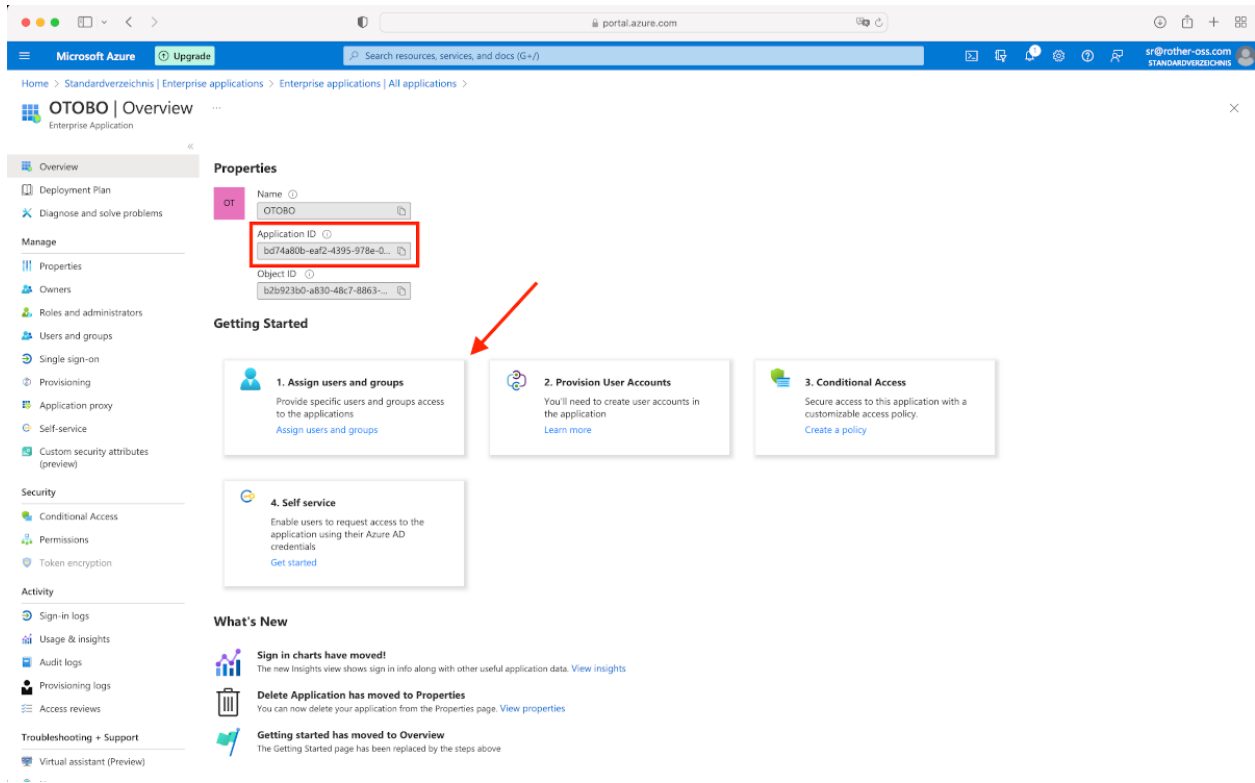
Options for IMAP:

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





The mailbox user must be assigned to the application. You will need the Application ID later on in OTOBO (Attention, the application ID of the “Enterprise APP” may differ from that of the “Application Registration”. In this case, please use the Application/Client ID of the registration.)



You will also need the domain’s tenant ID*

In the next step you have to add a new app in App registration.

Create a Redirect URL of type Web and a secret client key.

Redirect URL = <https://<OTOBO address>/otobo/index.pl?Action=AdminMailAccount>

Switch to “API permissions“ and add “IMAP.AccessAsUser.All“ and “POP.AccessAsUser.All“

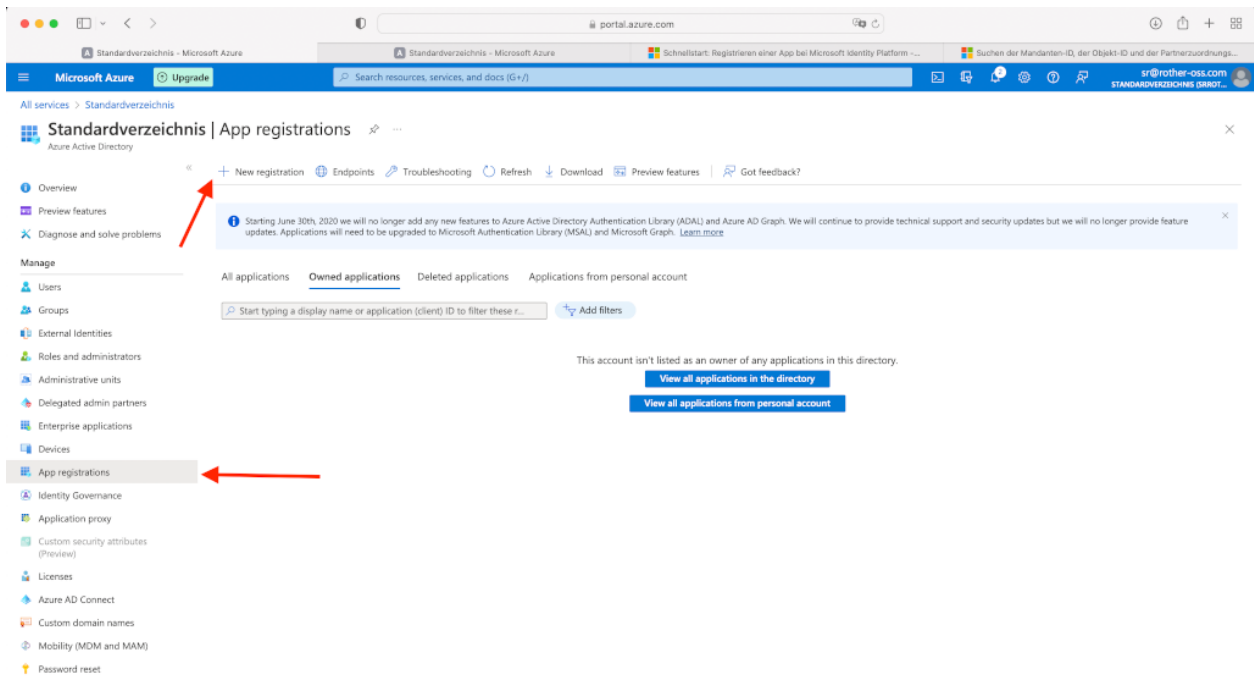
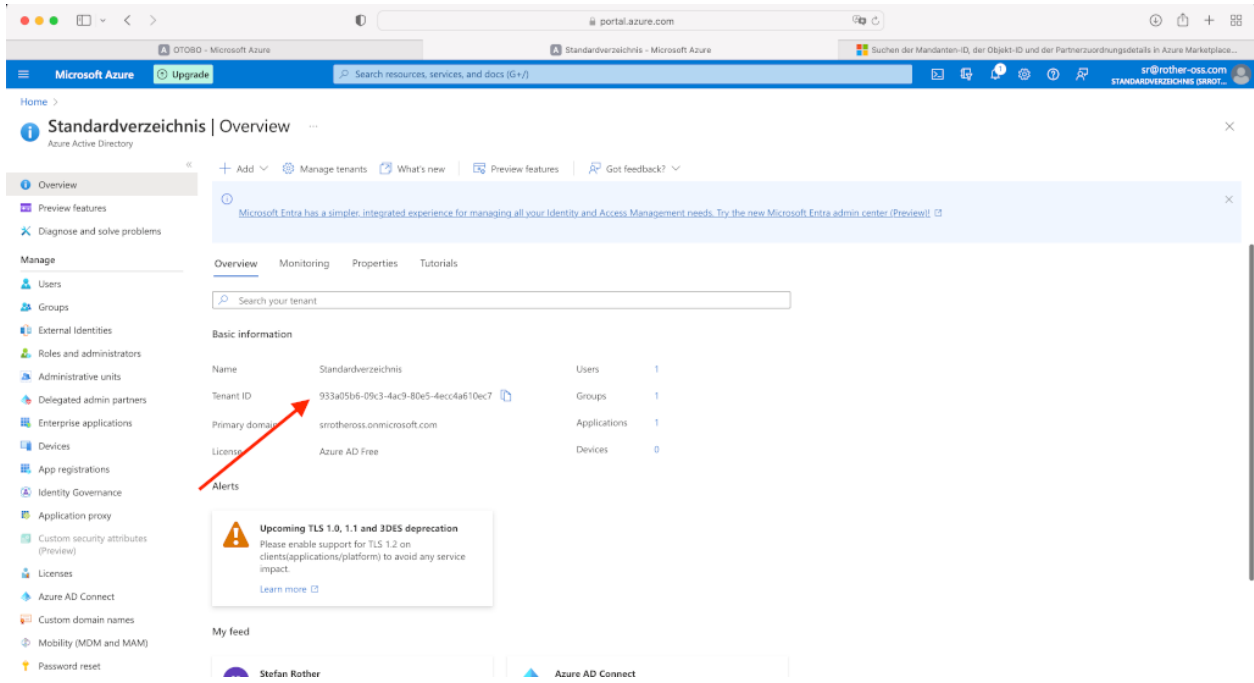
The Azure configuration is now complete. Please check whether port 143 and 993 are enabled.

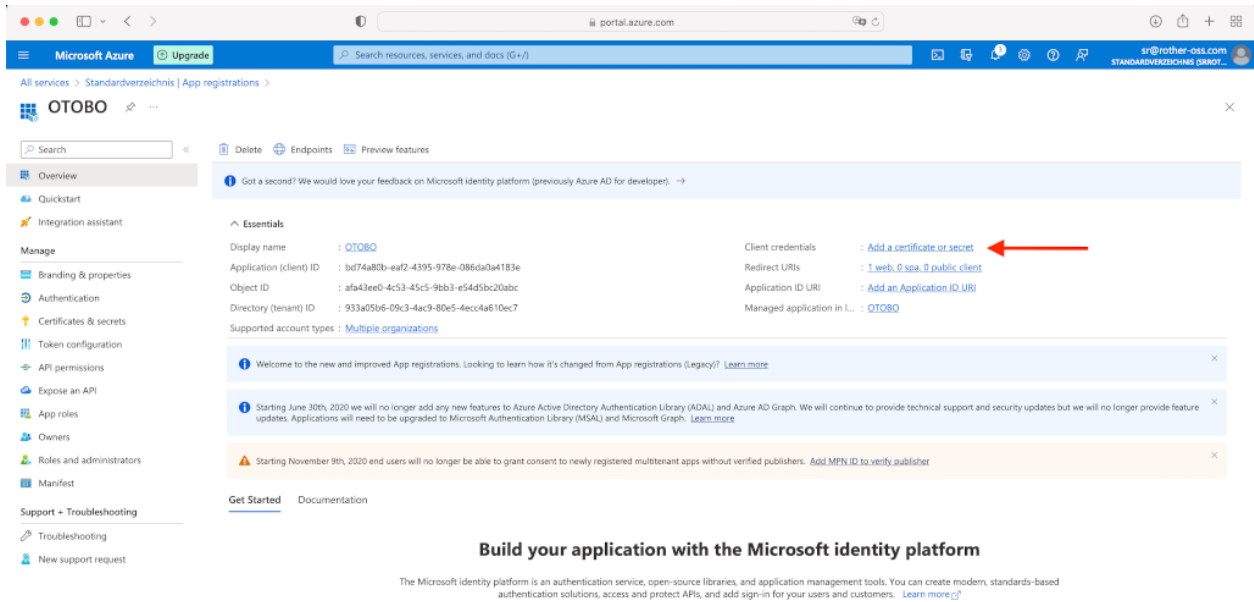
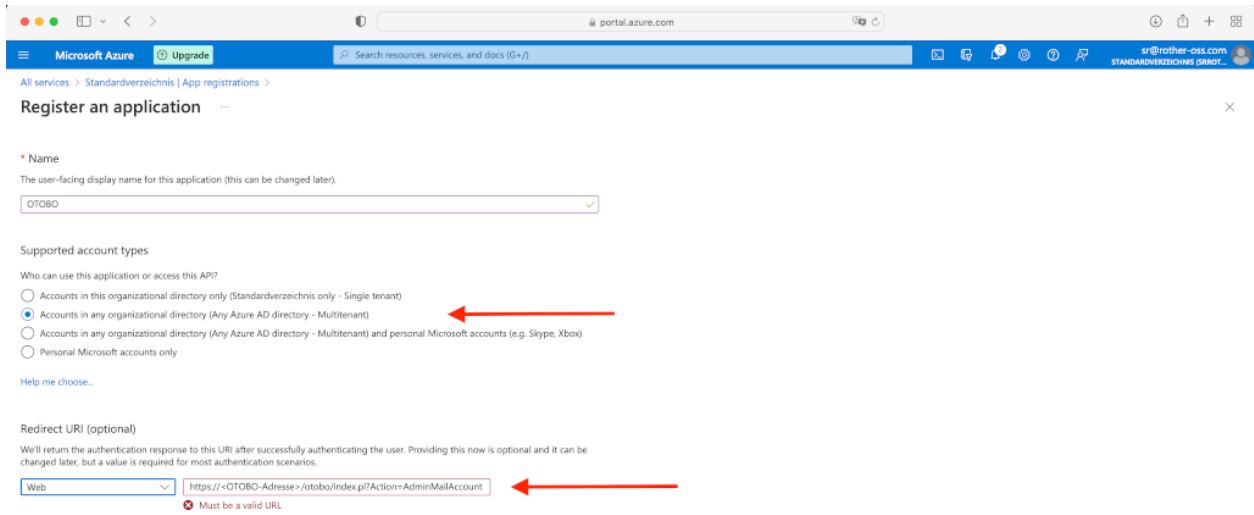
OTOBO OAuth2 Configuration

Please switch to the OTOBO Admin Interface -> System Configuration now and enable the profile / option `OAuth2::MailAccount::Profiles###Custom1`.

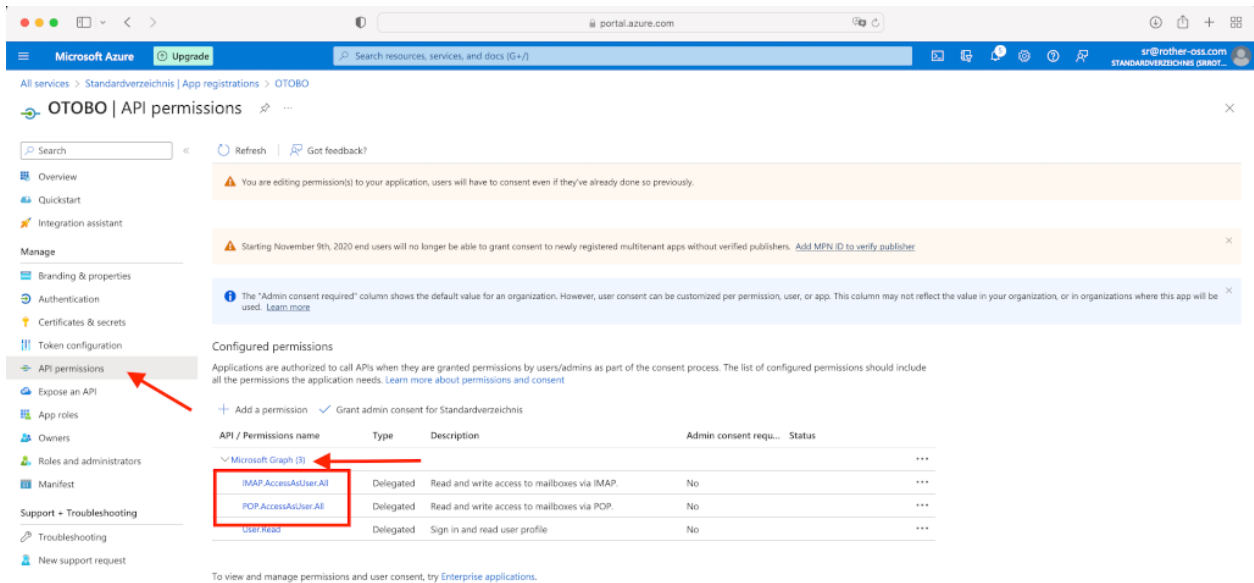
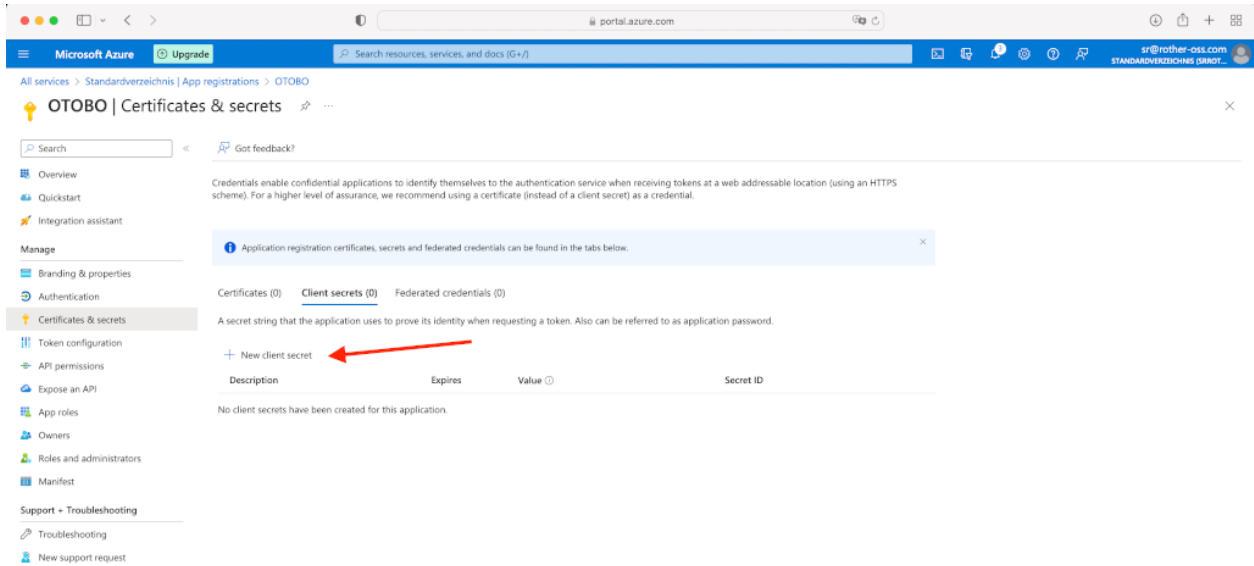
In the next step, add the ApplicationID/ClientID and the Client secret (You need the value, not the secret id):

In the option `OAuth2::MailAccount::Providers###MicrosoftAzure`, please adjust the provider. For `AuthURL` and `TokenURL`, the path “common” must be replaced by the TenantID.

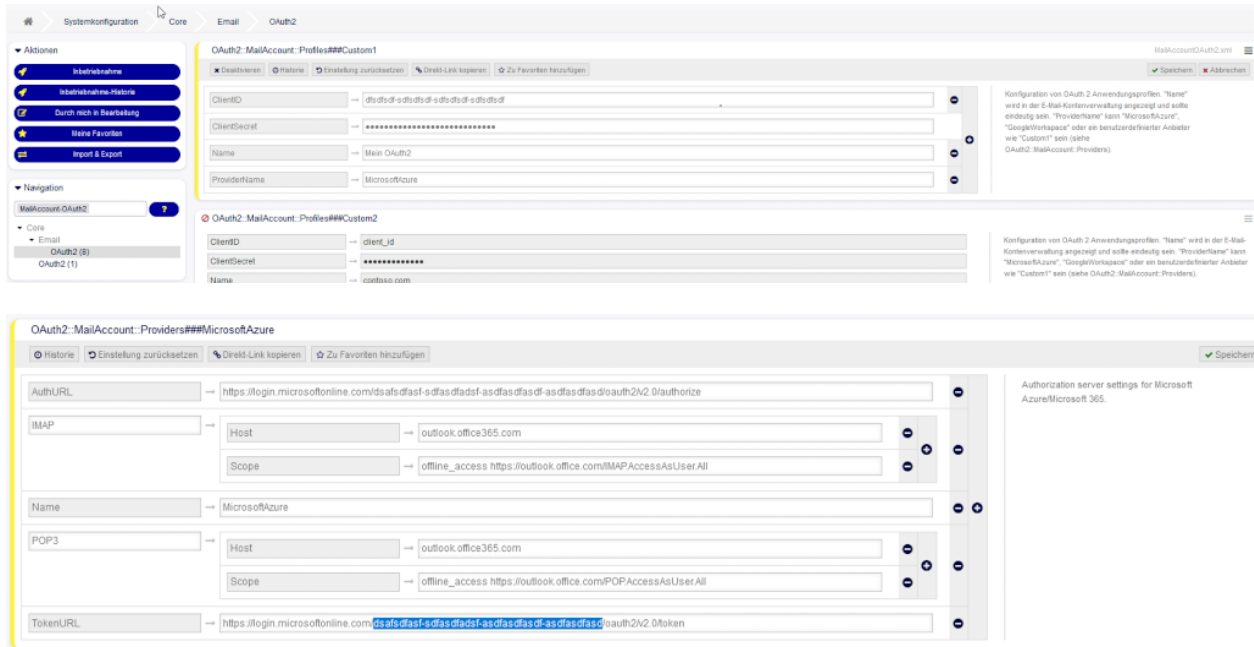




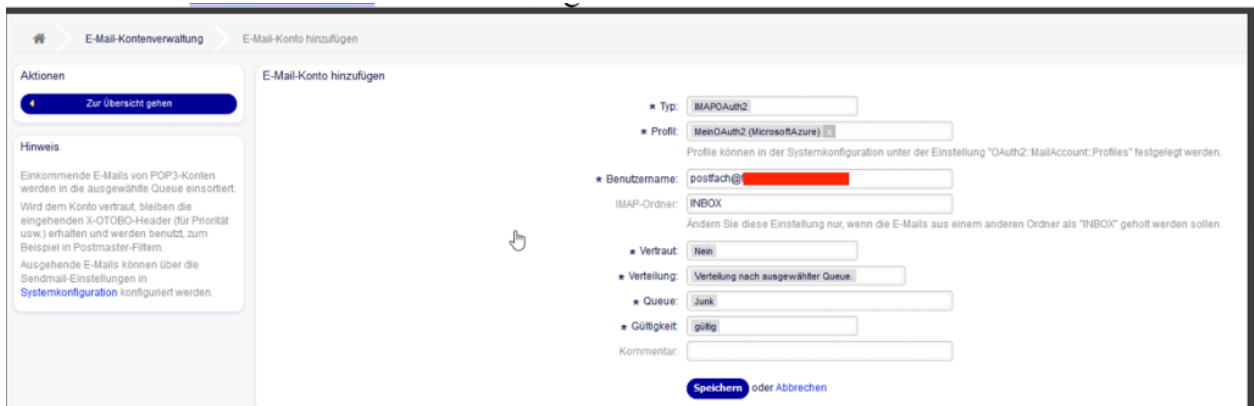
3.34: Please add a new client secret and note the value (not the secret id) as we need it later. It will only appear during the creation and you will not be able to see it afterwards anymore. Apparently Microsoft only allows a time of validity for two years max.



3.35: Please click on “Add permission” and choose Microsoft Graph, then new delegated permissions in the bar on the right. If Microsoft Graph is no show up as like in the screenshot.



Now the desired profile can be selected under Admin -> PostMaster Mail Account.



When you save your settings, you will be redirected to the Active Directory login. If everything works as it is supposed to, you are redirected to the mail account overview after logging in and there is the corresponding mailbox. Of course, it says IMAPOAuth2 and not IMAPS.

📌: it is important that you log in with the account that owns the mailbox. Otherwise errors can occur. Sometimes it is helpful to use a private tab for this.

You can check on the console if fetching mails from the newly created account is successful:

```
otobo> bin/otobo.Console.pl Maint::PostMaster::MailAccountFetch
```

Or for a Docker installation:

```
docker_admin> docker exec -t -u ootobo ootobo_web_1 bin/otobo.Console.pl
↵Maint::PostMaster::MailAccountFetch
```

Tip: Add --debug for more verbosity

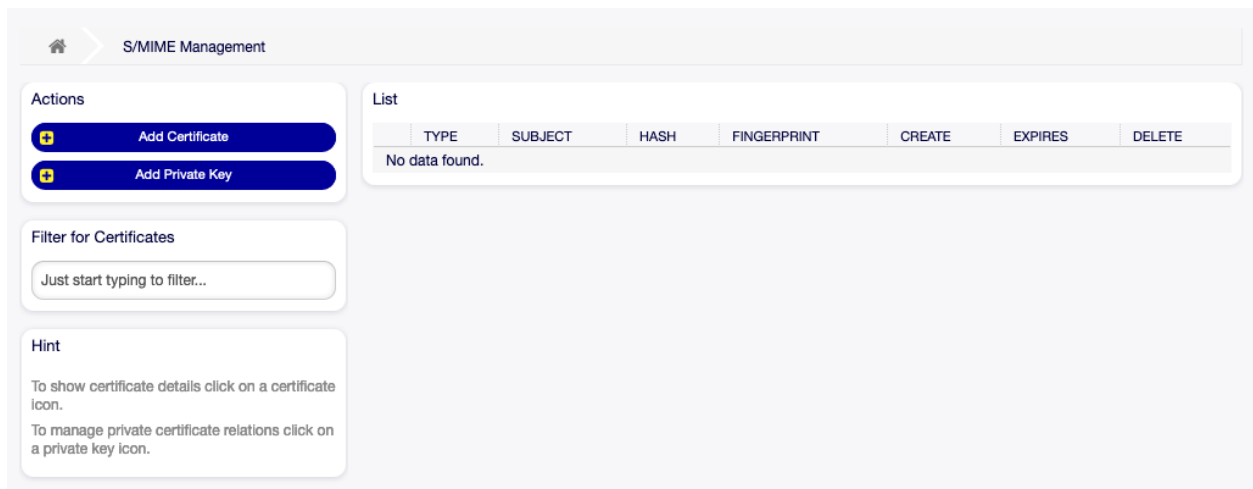
3.8 S/MIME

OTOBOS/MIME

OTOBO empowers you to encrypt communications where needed by means of S/MIME or PGP.

Tip: OTOBOS/MIME

OTOBOS/MIME/S/MIME OTOBO S/MIME



3.36: S/MIME

3.8.1 S/MIME

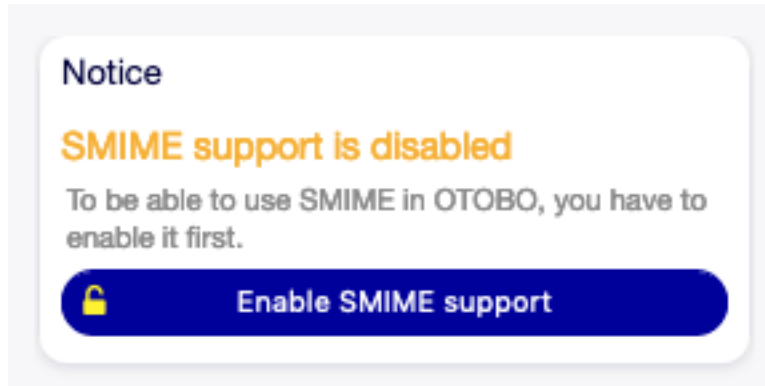
Tip: To be able to use S/MIME certificates in OTOBO, you have to activate its setting first.

OTOBOS/MIME

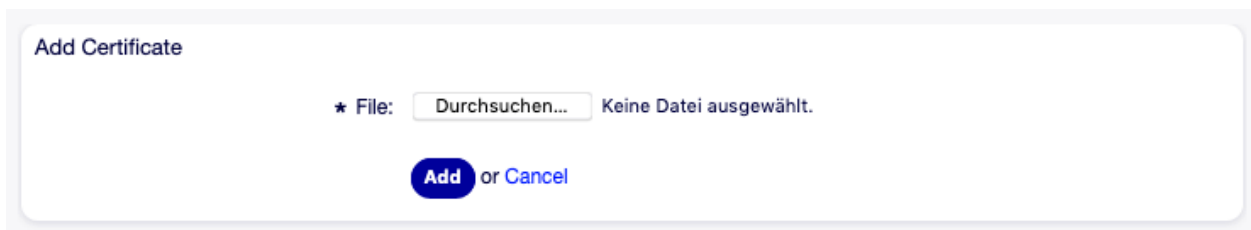
1. OTOBOS/MIME
2. OTOBO*...*
3. OTOBOS/MIME
4. OTOBO*...*

Tip: OTOBOS/MIME ----- BEGIN CERTIFICATE ----- OTOBOS/MIME key.pem root.crt cert.p7b OTOBOS/MIME

OTOBOS/MIME

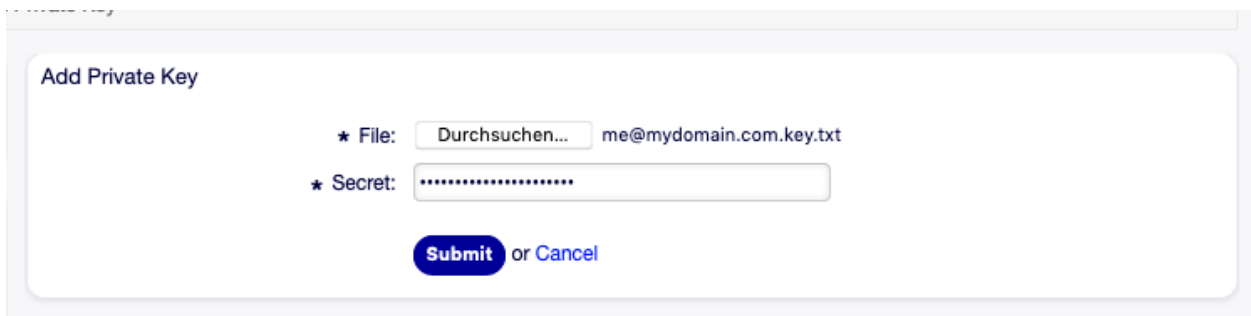


3.37: S/MIME



3.38: S/MIME

1. S/MIME
2. *
3. S/MIME
4. S/MIME



3.39: S/MIME

S/MIME

1. S/MIME
2. S/MIME

S: S/MIME S/MIME

List

	TYPE	SUBJECT	HASH	FINGERPRINT	CREATE	EXPIRES	DELETE
	cert	C = IL, O = StartCom Ltd., OU = Secure Digital Certificate Signing, CN = StartCom Certification Authority	ae8153b9	3E:2B:F7:...	2006-09-17	2036-09-17	

3.40: S/MIME

3.8.2 S/MIME

Core → Crypt → SMIME

3.9

The flexible OTOBO is an industry leader in email communication and offers you complete control of notifications based on any event in your system.

The flexible OTOBO is an industry leader in email communication and offers you complete control of notifications based on any event in your system.

Use this screen to add ticket notifications to the system. In a fresh OTOBO installation several ticket notifications are already added by default. The ticket notification management screen is available in the Ticket Notifications module of the Communication & Notifications group.

3.9.1

1. Ticket Notification Settings
2. Ticket Notification Settings
3. Ticket Notification Settings

1. Ticket Notification Settings
2. Ticket Notification Settings
3. Ticket Notification Settings

1. Ticket Notification Settings
2. Ticket Notification Settings

1. Ticket Notification Settings
2. Export_Notification.yml

Home > Ticket Notification Management

Actions

Add Notification

Export Notifications

Filter for Notifications

Just start typing to filter...

Configuration Import

Here you can upload a configuration file to import Ticket Notifications to your system. The file needs to be in .yaml format as exported by the Ticket Notification module.

Durchsuchen... Keine Datei ausgewählt.

Overwrite existing notifications?

Import Notification configuration

List

NAME	COMMENT	VALIDITY	CHANGED	CREATED	EXPORT	COPY	DELETE
Ticket create notification		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
Ticket email delivery failure notification		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
Ticket escalation notification		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
Ticket escalation warning notification		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
Ticket follow-up notification (locked)		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
Ticket follow-up notification (unlocked)		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
Ticket lock timeout notification		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
Ticket new note notification		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
Ticket owner update notification		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
Ticket pending reminder notification (locked)		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			

3.41: Ticket Notification Management

List

NAME	COMMENT	VALIDITY	CHANGED	CREATED	EXPORT	COPY	DELETE
Ticket create notification		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
Ticket email delivery failure notification		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			

3.42: Ticket Notification Management

OTOBODATA

OTOBODATA

1. OTOBODATA... OTOBO
2. OTOBODATA .ym1 OTOBO
3. OTOBODATA OTOBODATA OTOBO
4. OTOBO OTOBO OTOBO

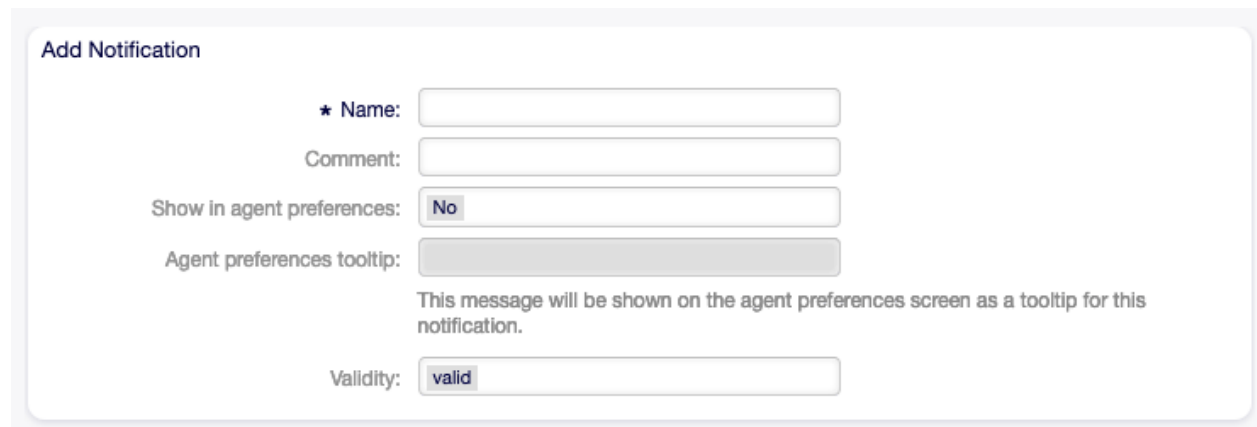
3.9.2 OTOBODATA

OTOBODATA OTOBODATA

OTOBODATA:

For an example, see a default ticket notification which is included in a fresh OTOBO installation.

OTOBODATA



Add Notification

* Name:

Comment:

Show in agent preferences:

Agent preferences tooltip:

This message will be shown on the agent preferences screen as a tooltip for this notification.

Validity:

3.43: OTOBODATA - OTOBO

OTOBODATA * OTOBODATA OTOBODATA OTOBODATA OTOBODATA

OTOBODATA OTOBODATA OTOBODATA OTOBODATA OTOBODATA OTOBODATA

OTOBODATA OTOBODATA OTOBODATA OTOBODATA

OTOBODATA OTOBODATA OTOBODATA OTOBODATA

OTOBODATA OTOBODATA OTOBODATA

OTOBODATA OTOBODATA OTOBODATA OTOBODATA OTOBODATA OTOBODATA

OTOBODATA OTOBODATA OTOBODATA OTOBODATA

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

Ticket notifications

NOTIFICATION	✉
Ticket create notification	✓
Ticket follow-up notification (locked)	✓
Ticket follow-up notification (unlocked)	✓
Ticket lock timeout notification	✓
Ticket queue update notification	✓
Ticket service update notification	✓

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

3.44: Ticket notifications

▼ Events

* Event:

Here you can choose which events will trigger this notification. An additional ticket filter can be applied below to only send for ticket with certain criteria.

3.45: Event filter

Events

Events are used to trigger notifications. The following table lists the events that are available in OTOBO.

Table 1

Table 1

Table 1: Ticket events

Event

Description

Event

Event

Event ID

Event ID

Event ID

Table 1

¹ Event ID

▼ Ticket Filter

State:

Priority:

Queue:

Lock:

Service:

SLA:

Customer ID:

Customer User ID:

Dynamic Fields

Process:

Activity:

3.46: Ticket Filter - Screenshot

▼ Article Filter (Only for ArticleCreate and ArticleSend event)

Article sender type:

Customer visibility:

Communication channel:

Include attachments to notification:

Attachment Name:

Bcc:

Body:

Cc:

From:

Subject:

To:

3.47: Article Filter - Screenshot

ArticleCreate ArticleSend

agent system customer
Invisible to customer Visible to customer
Filter for the communication channel. Possible values are Chat, Email, OTOBO, Phone or SMS.

Recipients
Send to:
Send to these agents:
Send to all group members (agents only):
Send to all role members:
Send on out of office: Also send if the user is currently out of office.
Once per day: Notify user just once per day about a single ticket using a selected transport.

3.48: -

- •
•
•
•

- `OTOBODaemon`
- `OTOBODaemon`
- `OTOBODaemon`
- `OTOBODaemon`
- `OTOBODaemon`
- `OTOBODaemon`

`OTOBODaemon` `OTOBODaemon`

`OTOBODaemon` `OTOBODaemon`

`OTOBODaemon` `OTOBODaemon`

`OTOBODaemon` `OTOBODaemon`

`OTOBODaemon` Notify users just once per day about a single ticket using a selected transport. If this is the first notification about a ticket, then the notification will be sent. If a notification was already sent before and this option is checked, the OTOBO daemon will check the time the last notification was sent. If there was no notification sent in the last 24 hours, the notification will be sent again.

`OTOBODaemon`

`OTOBODaemon` `OTOBODaemon`Web`OTOBODaemon`

`OTOBODaemon` Additional recipients can be added here. Use comma or semicolon to separate the email addresses.

`OTOBODaemon` `OTOBODaemon`

`OTOBODaemon` `OTOBODaemon`

`OTOBODaemon`: Additional email templates can be added by placing a `.tt` file into the folder `<OTOBODaemon_Home>/Kernel/Output/HTML/Templates/Standard/NotificationEvent/Email/`. See the existing email templates for an example.

`OTOBODaemon` `OTOBODaemon`

`OTOBODaemon`: `OTOBODaemon` `PGP` `S/MIME`

`OTOBODaemon` `OTOBODaemon`

`OTOBODaemon` `PGP` `PGP` `PGP`

`OTOBODaemon` `PGP` `PGP` `PGP`

`OTOBODaemon` `PGP` `PGP` `PGP`

`OTOBODaemon` `S/MIME` `S/MIME`

`OTOBODaemon` `S/MIME` `S/MIME`

`OTOBODaemon` `S/MIME` `S/MIME`

`OTOBODaemon`: `OTOBODaemon` `PGP` `S/MIME`

▼ Notification Methods

These are the possible methods that can be used to send this notification to each of the recipients. Please select at least one method below.

Email

Enable this notification method:

Additional recipient email

addresses: Use comma or semicolon to separate email addresses.
You can use OTOBO-tags like <OTOBO_TICKET_DynamicField_...> to insert values from the current ticket.

Article visible for customer:

An article will be created if the notification is sent to the customer or an additional email address.

Email template:

Use this template to generate the complete email (only for HTML emails).

Enable email security:

Email security level:

If signing key/certificate is missing:

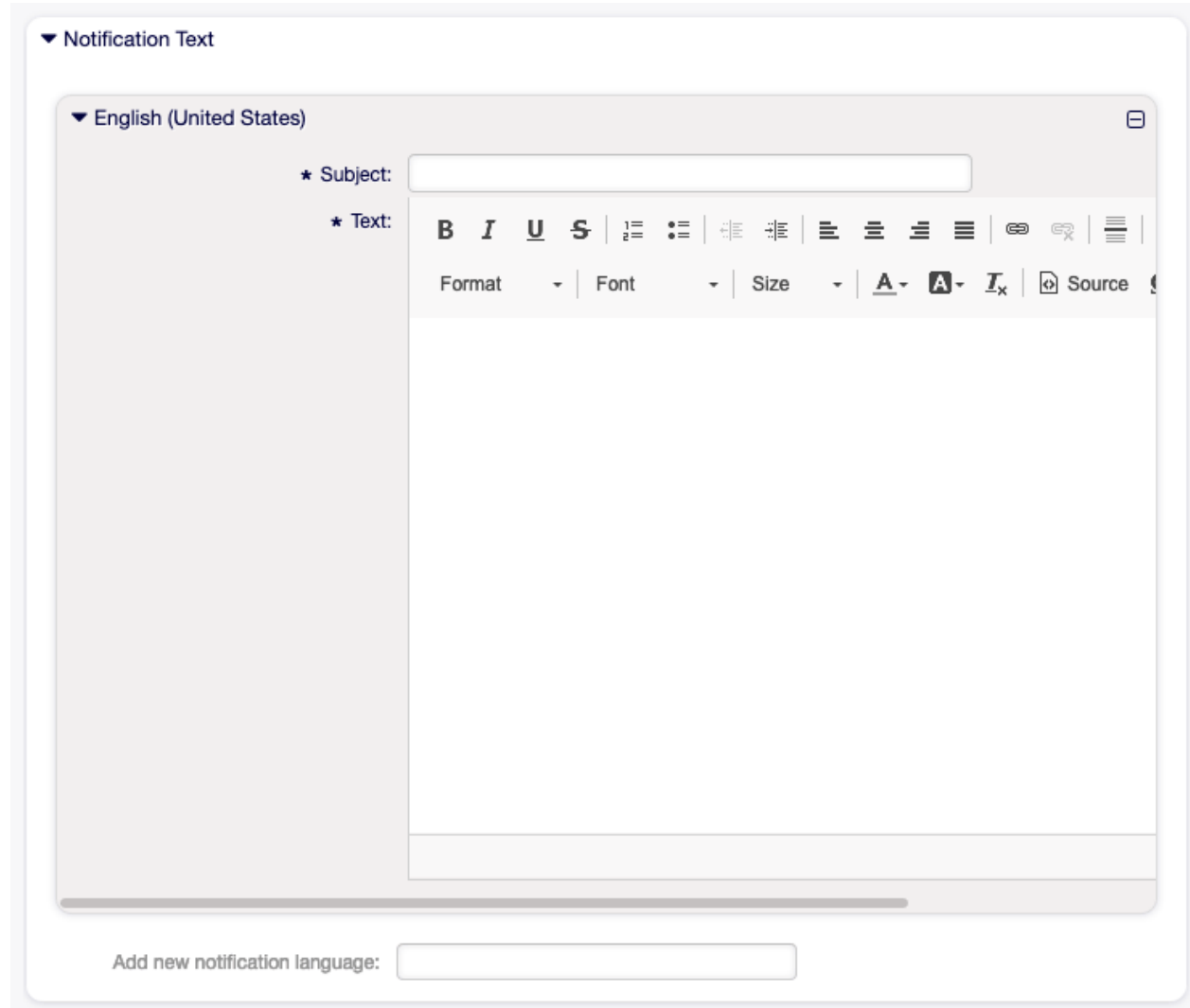
If encryption key/certificate is missing:

3.49: Notification Methods - Email

Notification Text

English (United States)

Subject



3.50: Notification Text - English (United States)

The main content of a notification can be added for each languages with localized subject and body text. It is also possible to define static text content mixed with OTOBO smart tags.

* Subject

* Text

Notification Text

⚠: Deleting a language in `DefaultUsedLanguages` setting that already has a notification text here will make the notification text unusable. If a language is not present or enabled on the system, the corresponding notification text could be deleted if it is not needed anymore.

3.9.3 変数

Using variables in the text makes it possible to personalize messages. Variables, known as OTOBO tags, are replaced by OTOBO when generating the message. Find a list of available tags stems for this resource at the bottom of both add and edit screens.

For example, the variable `<OTOBO_TICKET_TicketNumber>` expands to the ticket number allowing a template to include something like the following.

```
Ticket#<OTOBO_TICKET_TicketNumber>
```

変数

```
Ticket#2018101042000012
```

▼ Tag Reference

Notifications are sent to an agent or a customer.

You can use the following tags:

<OTOBO_AGENT_SUBJECT[20]>

To get the first 20 character of the subject (of the latest agent article).

<OTOBO_AGENT_BODY[5]>

To get the first 5 lines of the body (of the latest agent article).

<OTOBO_AGENT_*>

To get the article attribute (e.g. <OTOBO_AGENT_From>, <OTOBO_AGENT_To>, <OTOBO_AGENT_Cc>).

<OTOBO_CUSTOMER_SUBJECT[20]>

To get the first 20 character of the subject (of the latest customer article).

<OTOBO_CUSTOMER_BODY[5]>

To get the first 5 lines of the body (of the latest customer article).

<OTOBO_CUSTOMER_REALNAME>

To get the name of the ticket's customer user (if given).

<OTOBO_CUSTOMER_*>

To get the article attribute (e.g. <OTOBO_CUSTOMER_From>, <OTOBO_CUSTOMER_To>, <OTOBO_CUSTOMER_Cc>).

<OTOBO_CUSTOMER_DATA_*>

Attributes of the current customer user data (e.g. <OTOBO_CUSTOMER_DATA_UserFirstname>).

<OTOBO_OWNER_*> or <OTOBO_TICKET_OWNER_*>

Attributes of the current ticket owner user data (e.g. <OTOBO_OWNER_UserFirstname> or <OTOBO_TICKET_OWNER_UserFirstname>).

<OTOBO_RESPONSIBLE_*> or <OTOBO_TICKET_RESPONSIBLE_*>

Attributes of the current ticket responsible user data (e.g. <OTOBO_RESPONSIBLE_UserFirstname> or <OTOBO_TICKET_RESPONSIBLE_UserFirstname>).

<OTOBO_CURRENT_*>

Attributes of the current agent user who requested this action (e.g. <OTOBO_CURRENT_UserFirstname>).

<OTOBO_*> or <OTOBO_NOTIFICATION_RECIPIENT_*>

Attributes of the recipient user for the notification (e.g. <OTOBO_UserFullname> or <OTOBO_NOTIFICATION_RECIPIENT_UserFullname>).

<OTOBO_TICKET_*>

Attributes of the ticket data (e.g. <OTOBO_TICKET_TicketNumber>, <OTOBO_TICKET_TicketID>, <OTOBO_TICKET_Queue>, <OTOBO_TICKET_State>).

<OTOBO_TICKET_DynamicField_*>

Ticket dynamic fields internal key values (e.g. <OTOBO_TICKET_DynamicField_TestField>, <OTOBO_TICKET_DynamicField_TicketFreeText1>).

<OTOBO_TICKET_DynamicField_*_Value>

Ticket dynamic fields display values, useful for Dropdown and Multiselect fields (e.g. <OTOBO_TICKET_DynamicField_TestField_Value>, <OTOBO_TICKET_DynamicField_TicketFreeText1_Value>).

<OTOBO_CONFIG_*>

Config options (e.g. <OTOBO_CONFIG_ContentType>).

Example notification:

Subject: Ticket Created: <OTOBO_TICKET_Title>

Text:

```
Hi <OTOBO_NOTIFICATION_RECIPIENT_UserFirstname>,

ticket [<OTOBO_CONFIG_TicketHook><OTOBO_TICKET_TicketNumber>] has been
created in queue <OTOBO_TICKET_Queue>.

<OTOBO_CUSTOMER_REALNAME> wrote:
<OTOBO_CUSTOMER_Body[30]>

<OTOBO_CONFIG_ContentType>://<OTOBO_CONFIG_FQDN>
/<OTOBO_CONFIG_ScriptAlias>index.pl?Action=AgentTicketZoom;TicketID=
<OTOBO_TICKET_TicketID>
```


Agent Management

Actions

Wildcards like ** are allowed.

Add Agent

Hint

Agents will be needed to handle tickets.
Attention: Don't forget to add a new agent to groups and/or roles!

List (2 total)

USERNAME	NAME	EMAIL	LAST LOGIN	VALIDITY	CHANGED	CREATED
root@localhost	Admin OTOBO	root@localhost	11/02/2020 12:33 (Europe/Berlin)	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
sa	Super Admin	sa@trash-mail.net	11/02/2020 13:02 (Europe/Berlin)	valid	11/02/2020 13:01 (Europe/Berlin)	09/21/2020 19:16 (Europe/Berlin)

4.1: Agent Management

1. Agent Management
2. Add Agent
3. Add Agent

Add Agent

Title or salutation:

* Firstname:

* Lastname:

* Username:

Password:

Will be auto-generated if left empty.

* Email:

Mobile:

Validity: valid

Save or Cancel

4.2: Add Agent

1. Add Agent

1. Add Agent

1. Add Agent
2. Add Agent
3. Add Agent

1. Add Agent

Edit Agent

Title or salutation:

* Firstname:

* Lastname:

* Username:

Password:

* Email:

Mobile:

Validity:

or or

Figure 4.3: Edit Agent

4.1.1. Prerequisites

1. Ensure that the system is properly configured.
2. Ensure that the system is properly configured.

Note: The system is properly configured.

The system is properly configured.

Effective Permissions for Agent

Group Permissions

GROUP	RO	MOVE_INTO	CREATE	NOTE	OWNER	PRIORITY	RW
admin	✓	✓	✓	✓	✓	✓	✓
stats	✓	✓	✓	✓	✓	✓	✓
users	✓	✓	✓	✓	✓	✓	✓

Table above shows effective group permissions for the agent. The matrix takes into account all inherited permissions (e.g. via roles).

Figure 4.4: Effective Permissions for Agent

4.1.2. Installation

The system is properly configured.

Note: The system is properly configured.

Mr.Dr.Jr.

*

*

:

FirstnameLastnameOrder

*

Email *

Agent Configuration Options

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

4.1.3

Agents can be read and synchronized from an Active Directory® or LDAP server.

: The following configurations are taken care of by the Customer Solution Team in OTOBO. Please contact the Customer Solution Team via support@otrs.ch or in the OTOBO Portal.

users LDAP/Active Directory Defaults.pm Config.pm

```
# This is an example configuration for an LDAP auth. backend.
# (take care that Net::LDAP is installed!)
# $Self->{AuthModule} = 'Kernel::System::Auth::LDAP';
# $Self->{'AuthModule::LDAP::Host'} = 'ldap.example.com';
# $Self->{'AuthModule::LDAP::BaseDN'} = 'dc=example,dc=com';
# $Self->{'AuthModule::LDAP::UID'} = 'uid';

# Check if the user is allowed to auth in a posixGroup
# (e. g. user needs to be in a group xyz to use otopo)
# $Self->{'AuthModule::LDAP::GroupDN'} = 'cn=otoboallow,ou=posixGroups,dc=example,
->dc=com';
# $Self->{'AuthModule::LDAP::AccessAttr'} = 'memberUid';
# for ldap posixGroups objectclass (just uid)
# $Self->{'AuthModule::LDAP::UserAttr'} = 'UID';
# for non ldap posixGroups objectclass (with full user dn)
# $Self->{'AuthModule::LDAP::UserAttr'} = 'DN';

# The following is valid but would only be necessary if the
# anonymous user do NOT have permission to read from the LDAP tree
```



```
# $Self->{'AuthModule::LDAP::SearchUserDN'} = '';
# $Self->{'AuthModule::LDAP::SearchUserPw'} = '';

# in case you want to add always one filter to each ldap query, use
# this option. e. g. AlwaysFilter => '(mail=*)' or AlwaysFilter => '(objectclass=user)
↳ '
# or if you want to filter with a locigal OR-Expression, like AlwaysFilter =>
↳ '(|(mail=*abc.com)(mail=*xyz.com))'
# $Self->{'AuthModule::LDAP::AlwaysFilter'} = '';

# in case you want to add a suffix to each login name, then
# you can use this option. e. g. user just want to use user but
# in your ldap directory exists user@domain.
# $Self->{'AuthModule::LDAP::UserSuffix'} = '@domain.com';

# In case you want to convert all given usernames to lower letters you
# should activate this option. It might be helpful if databases are
# in use that do not distinguish selects for upper and lower case letters
# (Oracle, postgresql). User might be synched twice, if this option
# is not in use.
# $Self->{'AuthModule::LDAP::UserLowerCase'} = 0;

# In case you need to use OTOBO in iso-charset, you can define this
# by using this option (converts utf-8 data from LDAP to iso).
# $Self->{'AuthModule::LDAP::Charset'} = 'iso-8859-1';

# Net::LDAP new params (if needed - for more info see perldoc Net::LDAP)
# $Self->{'AuthModule::LDAP::Params'} = {
#     port      => 389,
#     timeout   => 120,
#     async     => 0,
#     version   => 3,
# };

# Die if backend can't work, e. g. can't connect to server.
# $Self->{'AuthModule::LDAP::Die'} = 1;

You should uncomment the following settings as a minimum.
```

XXXXXXXXXXXXXXXXXXXX

```
$Self->{'AuthModule'} = 'Kernel::System::Auth::LDAP';
$Self->{'AuthModule::LDAP::Host'} = 'ldap.example.com';
$Self->{'AuthModule::LDAP::BaseDN'} = 'dc=example,dc=com';
$Self->{'AuthModule::LDAP::UID'} = 'uid';
```

Host XXXXXXXXDNSXXXXIP

BaseDN XXXXXXXX

UID XXXXXXXX

XX: XXActive DirectoryXXX sAMAccountName

XXXXXXXXXXXXXXXXXXXX Config.pm XXXXXXXX XXXXXXXXXXXXXXXXXXXXXXX[1-9]XXXXXXXXXXXXXXXXXXXX

```
### Backend One
$self->{AuthModule} = 'Kernel::System::Auth::LDAP';
$self->{'AuthModule::LDAP::Host'} = 'ldap.example.com';
$self->{'AuthModule::LDAP::BaseDN'} = 'dc=example,dc=com';
$self->{'AuthModule::LDAP::UID'} = 'uid';

### Backend Two
$self->{AuthModule1} = 'Kernel::System::Auth::LDAP';
$self->{'AuthModule::LDAP::Host1'} = 'ldap.example.com';
$self->{'AuthModule::LDAP::BaseDN1'} = 'dc=example,dc=com';
$self->{'AuthModule::LDAP::UID1'} = 'uid';
```

Agent User Data Agent Authentication Back End Defaults.pm Config.pm

Agent Synchronization Back End

```
$self->{'AuthModule::UseSyncBackend'} = 'AuthSyncBackend';
```

Config.pm [1-9]

```
$self->{'AuthModule::UseSyncBackend1'} = 'AuthSyncBackend1';
```

Agent Synchronization Back End

```
$self->{'AuthModule::UseSyncBackend1'} = 'AuthSyncBackend';
```

Defaults.pm Config.pm

```
# This is an example configuration for an LDAP auth sync. backend.
# (take care that Net::LDAP is installed!)
# $self->{AuthSyncModule} = 'Kernel::System::Auth::Sync::LDAP';
# $self->{'AuthSyncModule::LDAP::Host'} = 'ldap.example.com';
# $self->{'AuthSyncModule::LDAP::BaseDN'} = 'dc=example,dc=com';
# $self->{'AuthSyncModule::LDAP::UID'} = 'uid';

# The following is valid but would only be necessary if the
# anonymous user do NOT have permission to read from the LDAP tree
# $self->{'AuthSyncModule::LDAP::SearchUserDN'} = '';
# $self->{'AuthSyncModule::LDAP::SearchUserPw'} = '';

# in case you want to add always one filter to each ldap query, use
# this option. e. g. AlwaysFilter => '(mail=*)' or AlwaysFilter => '(objectclass=user)
# or if you want to filter with a logical OR-Expression, like AlwaysFilter =>
# $self->{'AuthSyncModule::LDAP::AlwaysFilter'} = '';
```

```
# AuthSyncModule::LDAP::UserSyncMap
# (map if agent should create/synced from LDAP to DB after successful login)
# you may specify LDAP-Fields as either
# * list, which will check each field. first existing will be picked ( ["givenName", "cn
↳", "_empty"] )
# * name of an LDAP-Field (may return empty strings) ("givenName")
# * fixed strings, prefixed with an underscore: "_test", which will always return this.
↳fixed string
# $Self->{'AuthSyncModule::LDAP::UserSyncMap'} = {
#     # DB -> LDAP
#     UserFirstname => 'givenName',
#     UserLastname  => 'sn',
#     UserEmail     => 'mail',
# };
```

XXXXXXXXXXXXXXXXXXXX

```
$Self->{'AuthSyncModule'} = 'Kernel::System::Auth::Sync::LDAP';
$Self->{'AuthSyncModule::LDAP::Host'} = 'ldap.example.com';
$Self->{'AuthSyncModule::LDAP::BaseDN'} = 'dc=example,dc=com';
$Self->{'AuthSyncModule::LDAP::UID'} = 'uid';
```

Host XXXXXXXDNSXXXXIP

BaseDN XXXXXXX

UID XXXXXXX

XX: XXActive DirectoryXXX sAMAccountName

XX: XXXXXX Agent Synchronization Back End XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX[1-9]XXXXXXXXXXXXXXXXXXXXXXXXXXXX
AuthSyncModule XXX Agent Authentication Back End XXXXXX

XXXXXXXX

It is possible to use security objects to synchronize users to OTOBO groups. To achieve this copy the following block from the Defaults.pm and paste it into the Config.pm.

XX: X must be available in OTOBO to use this feature.

XXXXXXXX

It is possible to use security objects to synchronize users to OTOBO roles. To achieve this copy the following block from the Defaults.pm and paste it into the Config.pm.

XX: XX must be available in OTOBO to use this feature.

4.1.4 管理代理组关系

4.2 管理代理组关系

管理代理组关系的界面提供了管理代理对特定组访问的可能性。此外，您还可以高效且优雅地更改多个用户对任何一组访问。

The OTOBO interface provides you both with the possibility to manage an agent’s access to one or more particular groups. As well, you can change multiple users access to any one group, efficiently and elegantly.

管理代理组关系的界面提供了管理代理对特定组访问的可能性。此外，您还可以高效且优雅地更改多个用户对任何一组访问。

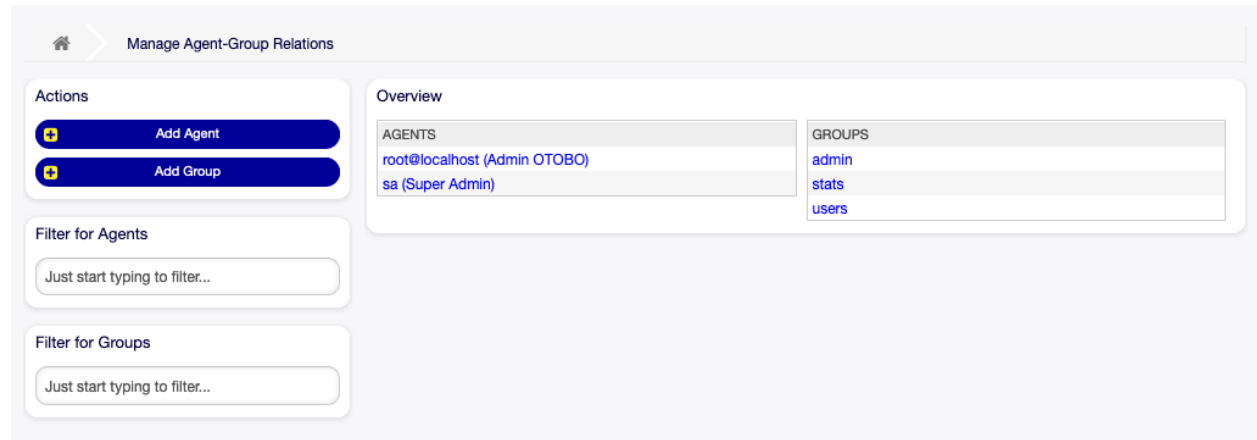


图 4.5: 管理代理组关系

4.2.1 更改代理组关系

管理代理组关系的界面提供了管理代理对特定组访问的可能性。

1. 单击“更改代理组关系”按钮。
2. 选择要更改关系的代理。
3. 单击“保存”、“保存并结束”或“取消”按钮。

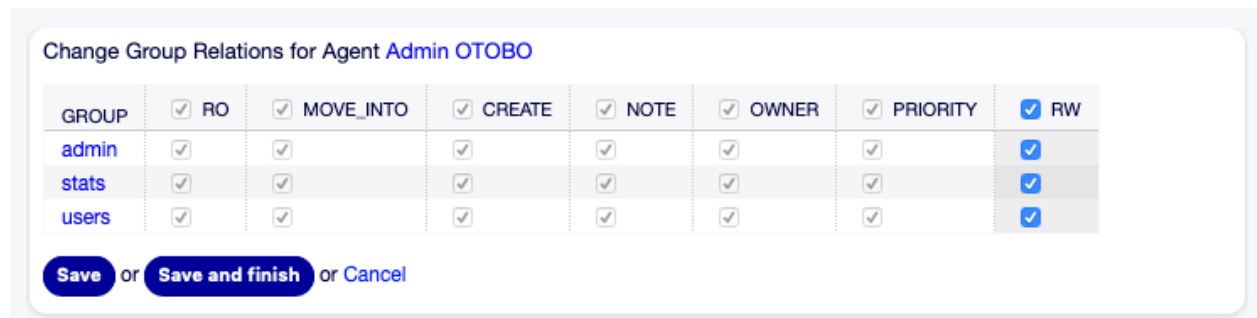


图 4.6: 更改代理组关系

管理代理组关系的界面提供了管理代理对特定组访问的可能性。

1. 单击“更改代理组关系”按钮。

1. 单击“角色”按钮

2. 单击“添加角色”按钮

3. 单击“添加”按钮

4. 单击“保存”按钮

注： 单击“角色”按钮，在弹出的对话框中，单击“添加”按钮，单击“保存”按钮。

4.3 角色管理

OTOBO 提供了预定义的一组权限，您可以通过一个或多个角色来定义。这些角色可以轻松地分配给一个或多个代理，或者一个或多个代理分配给一个角色。

OTOBO 允许通过一个或多个角色来定义预定义的一组权限。这些角色可以轻松地分配给一个或多个代理，或者一个或多个代理分配给一个角色。

OTOBO 提供了预定义的一组权限，您可以通过一个或多个角色来定义。这些角色可以轻松地分配给一个或多个代理，或者一个或多个代理分配给一个角色。

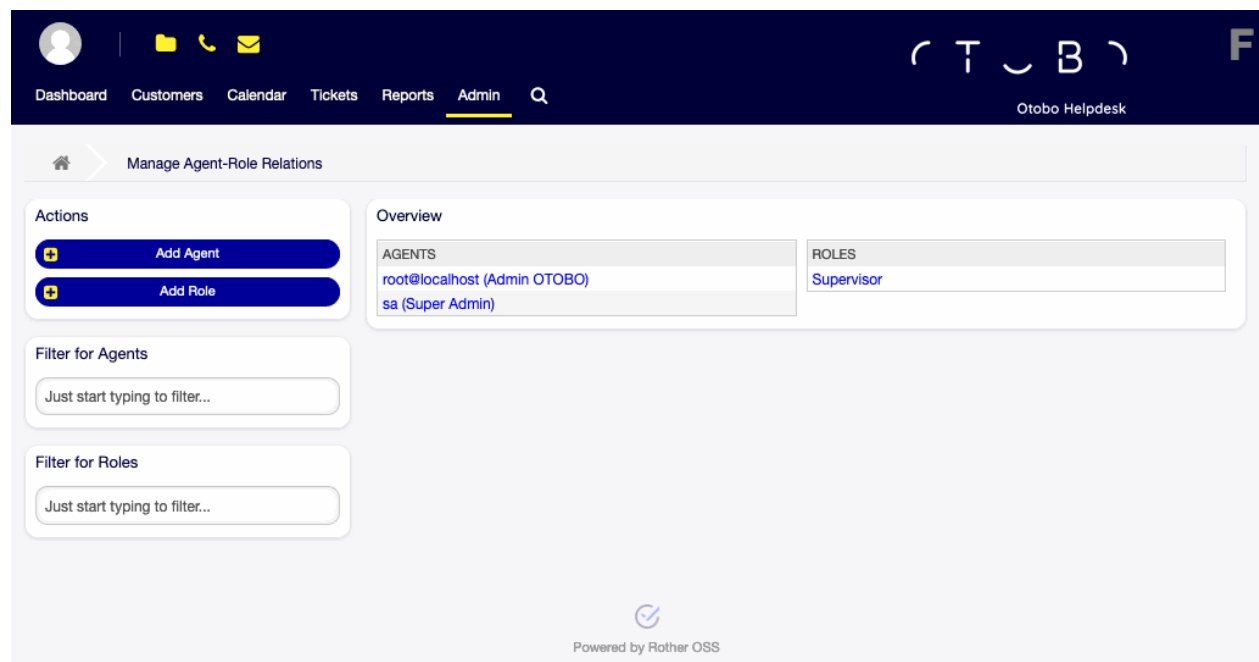


图 4.8: 角色管理

4.3.1 添加角色

1. 单击“角色”按钮

1. 单击“添加角色”按钮

2. 单击“添加”按钮

3. 单击“保存”按钮

4. 单击“保存”按钮

Change Role Relations for Agent Super Admin

ROLE	<input type="checkbox"/> ACTIVE
Supervisor	<input type="checkbox"/>

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

4.9: 画面

1. 画面
2. 画面
3. 画面

Change Agent Relations for Role Supervisor

AGENT	<input type="checkbox"/> ACTIVE
root@localhost (Admin OTOBO)	<input type="checkbox"/>
sa (Super Admin)	<input type="checkbox"/>

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

4.10: 画面

画面

画面

画面

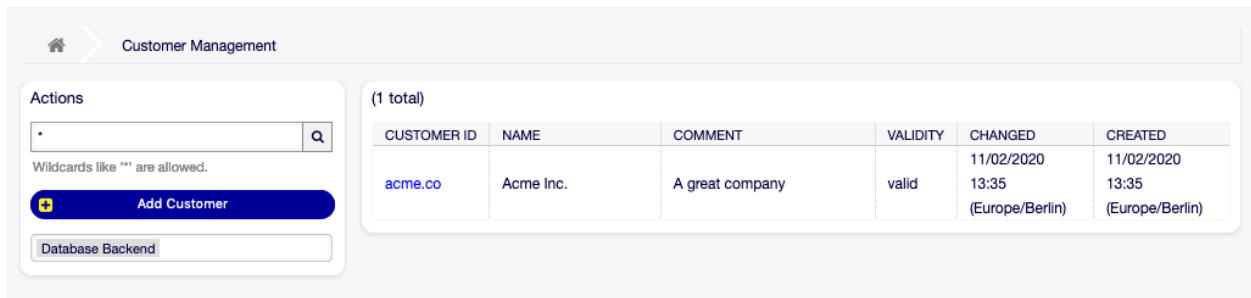
画面

4.4

Use this screen to add customer companies to the system. A fresh OTOBO installation contains no customers by default. The customer management screen is available in the Customers module of the Users, Groups & Roles group.

4.4.1

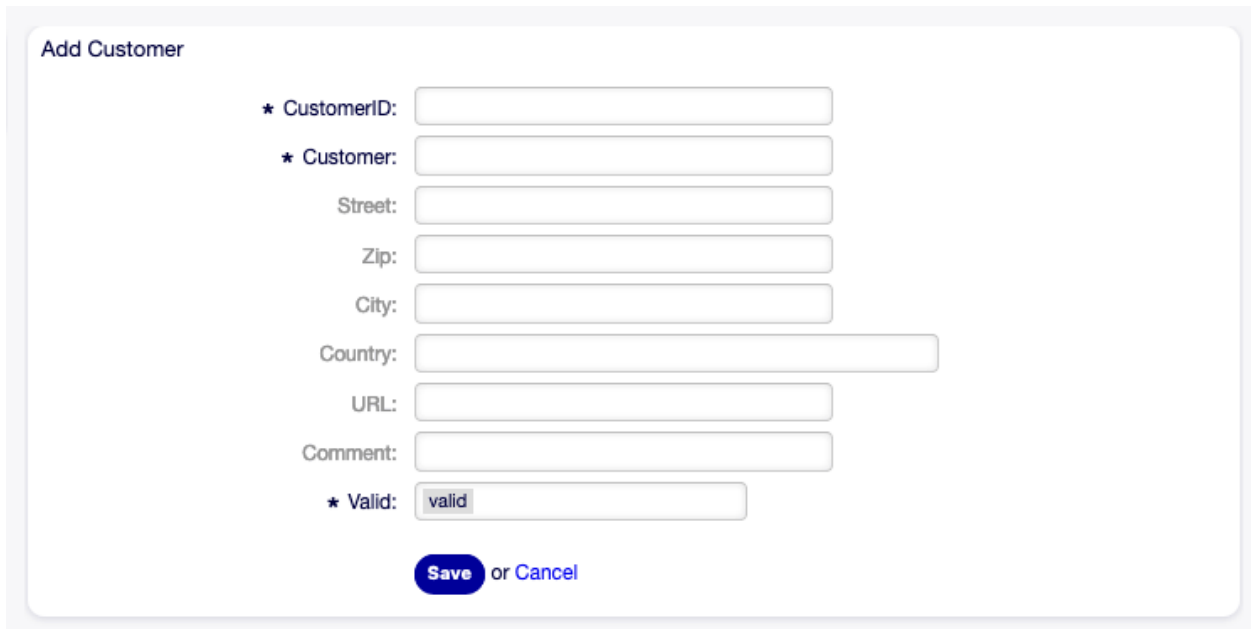
画面



4.11: Customer Management

Procedure

1. Click on the 'Add Customer' button.
2. Fill in the form fields.
3. Click on the 'Save' button.



4.12: Add Customer

Note: The 'Valid' field is a dropdown menu with 'valid' selected.

Procedure

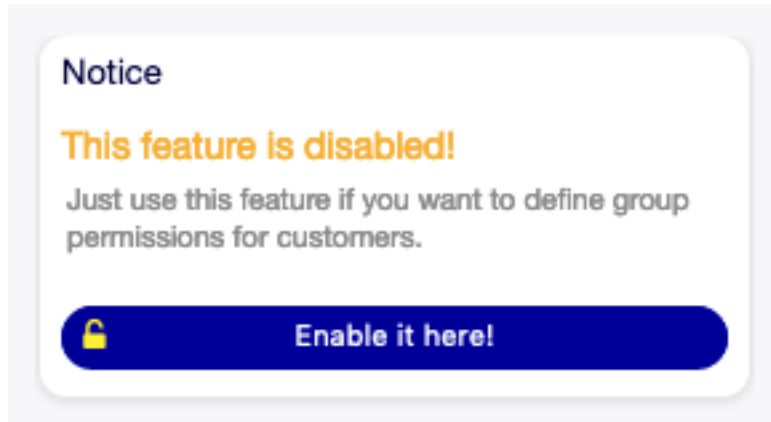
1. Click on the 'Add Customer' button.
2. Fill in the form fields.
3. Click on the 'Save' button.

Procedure

1. Click on the 'Add Customer' button.

4.5.1 4.5.1 4.5.1

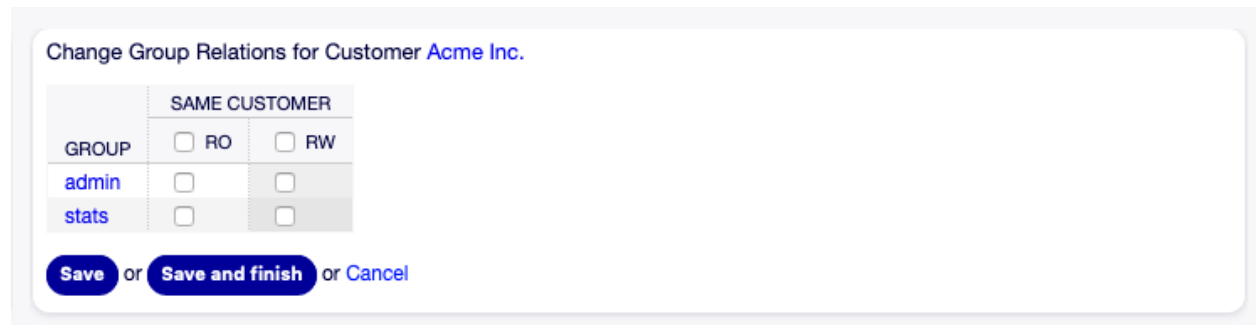
4.5.1: 4.5.1-4.5.1



4.16: 4.16-4.16

4.5.1: 4.5.1-4.5.1

1. 4.5.1 4.5.1
2. 4.5.1-4.5.1
3. 4.5.1 4.5.1



4.17: 4.17-4.17

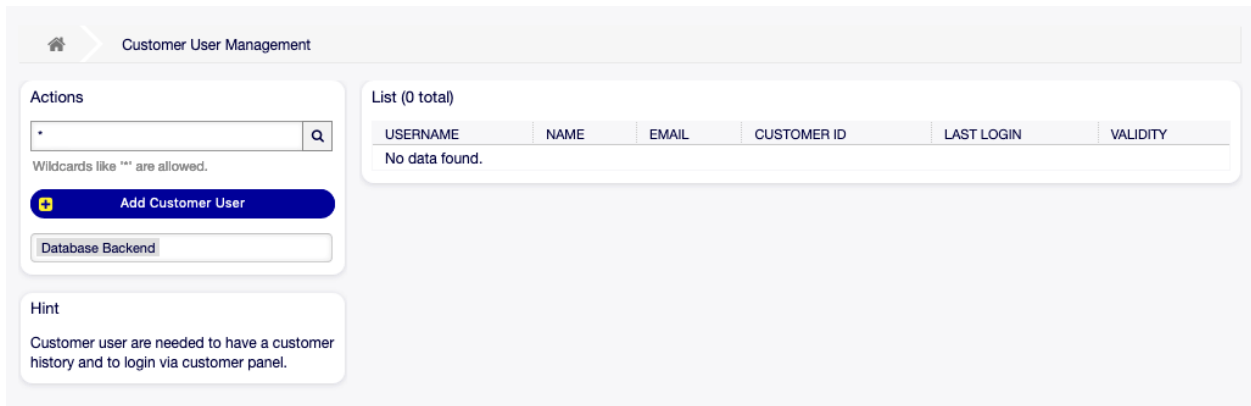
4.5.1: 4.5.1-4.5.1

1. 4.5.1 4.5.1
2. 4.5.1-4.5.1
3. 4.5.1 4.5.1

4.5.1: 4.5.1-4.5.1

1. 4.5.1-4.5.1
2. Add or modify groups in setting CustomerGroupCompanyAlwaysGroups.
3. 4.5.1-4.5.1

Use this screen to add a [customer user](#) to the system. A fresh OTOBO installation contains no customer users by default. The customer user management screen is available in the Customer Users module of the Users, Groups & Roles group.



4.20: Customer User Management

4.6.1 Prerequisites

1. The system must be installed and configured correctly.

2. The system must be configured to use LDAP authentication.

Prerequisites

1. The system must be installed and configured correctly.
2. The system must be configured to use LDAP authentication.
3. The system must be configured to use LDAP authentication.

3. The system must be configured to use LDAP authentication.

Prerequisites

1. The system must be installed and configured correctly.
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Prerequisites

1. The system must be installed and configured correctly.
2. The system must be configured to use LDAP authentication.

4. The system must be configured to use LDAP authentication.

Add Customer User

Title or salutation:

* Firstname:

* Lastname:

* Username:

Password:

* Email:

* CustomerID:

Phone:

Fax:

Mobile:

Street:

Zip:

City:

Country:

Comment:

* Valid:

Google Authenticator:

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

Interface language:

Select the main interface language.Language

Time Zone:

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

Ticket overview:

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

Number of displayed tickets:

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

Save or [Cancel](#)

4.21: Add Customer User

Edit Customer User

Title or salutation:

★ Firstname:

★ Lastname:

★ Username:

Password:

★ Email:

★ CustomerID:

Phone:

Fax:

Mobile:

Street:

Zip:

City:

Country:

Comment:

★ Valid:

Google Authenticator:

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

Interface language:

Select the main interface language. Language

Time Zone:

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

Ticket overview:

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

Number of displayed tickets:

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

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

4.22: Edit Customer User

Effective Permissions for Customer User

Group Permissions

GROUP	RO	RW
users	✓	✓

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

Customer Access

CUSTOMER	DIRECT
acme.co Acme Inc.	✓

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

Figure 4.23: Effective Permissions for Customer User

OTOB Administration Manual, 10.1

OTOB:

OTOB Administration Manual, 10.1

4.6.2 Customer Access

OTOB Administration Manual, 10.1

OTOB: Customer Access

OTOB Administration Manual, 10.1

* CustomerID

* Email

* CustomerID

OTOB Administration Manual, 10.1

Email * CustomerID

CustomerID * The ID of the customer company the customer user belongs to. Select a customer from the list of [OTOB Customers](#).

OTOB Administration Manual, 10.1

OTOB Administration Manual, 10.1

OTOB Administration Manual, 10.1

OTOB Administration Manual, 10.1

OTOB Administration Manual, 10.1

OTOB Administration Manual, 10.1

OTOB Administration Manual, 10.1

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

Setting this field to invalid or invalid-temporarily will disable the use of the resource.

It is possible to assign multiple customers to customer users via the screen.

It is possible to assign multiple customers to customer users via the screen.

4.6.3 Customer User Back Ends

The system works with many customer user data attributes such as username, email address, phone number, etc. These attributes are displayed in both the agent and the external interface, and also used for the authentication of customer users.

Customer data used or displayed within the system is highly customizable. The user login and the email address are always needed for customer authentication.

You can use two types of customer back end: database or LDAP. If you already have another customer back end (e.g. SAP), it is possible to write a module that uses it.

The administrator interface does not support the configuration of external back ends. Administrators need to edit the file `Kernel/Config.pm` by copying and pasting code snippets from `Kernel/Config/Defaults.pm` manually.

Do not modify the file `Kernel/Config/Defaults.pm`, it will be overwritten after upgrading the system! Copy and paste the code snippets into `Kernel/Config.pm` instead.

Database

This is the default customer user back end for new installations. The example below shows the configuration of a database customer back end, which uses customer user data stored in the database table `customer_user`.

```
# CustomerUser
# (customer user database backend and settings)
$self->{CustomerUser} = {
    Name => Translatable('Database Backend'),
    Module => 'Kernel::System::CustomerUser::DB',
    Params => {

        # if you want to use an external database, add the
        # required settings
        DSN => 'DBI:odbc:yourdsn',
        Type => 'mssql', # only for ODBC connections
        DSN => 'DBI:mysql:database=customerdb;host=customerdbhost',
        User => '',
        Password => '',
        Table => 'customer_user',
        ForeignDB => 0, # set this to 1 if your table does not have create_
        #time, create_by, change_time and change_by fields

        # CaseSensitive defines if the data storage of your DBMS is case sensitive
        # and will be
        # preconfigured within the database driver by default.
        # If the collation of your data storage differs from the default settings,
```

```

        # you can set the current behavior ( either 1 = CaseSensitive or 0 =
↳CaseINSensitive )
        # to fit your environment.
        #
#         CaseSensitive => 0,

        # SearchCaseSensitive will control if the searches within the data
↳storage are performed
        # case sensitively (if possible) or not. Change this option to 1, if you
↳want to search case sensitive.
        # This can improve the performance dramatically on large databases.
        SearchCaseSensitive => 0,
    },

    # customer unique id
    CustomerKey => 'login',

    # customer #
    CustomerID    => 'customer_id',
    CustomerValid => 'valid_id',

    # The last field must always be the email address so that a valid
    # email address like "John Doe" <john.doe@domain.com> can be constructed
↳from the fields.
    CustomerUserListFields => [ 'first_name', 'last_name', 'email' ],

#     CustomerUserListFields => ['login', 'first_name', 'last_name', 'customer_id',
↳'email'],
    CustomerUserSearchFields      => [ 'login', 'first_name', 'last_name',
↳'customer_id' ],
    CustomerUserSearchPrefix      => '*',
    CustomerUserSearchSuffix      => '*',
    CustomerUserSearchListLimit   => 250,
    CustomerUserPostMasterSearchFields => ['email'],
    CustomerUserNameFields        => [ 'title', 'first_name', 'last_name' ],
    CustomerUserEmailUniqCheck    => 1,

#     # Configures the character for joining customer user name parts. Join single
↳space if it is not defined.
#     # CustomerUserNameFieldsJoin => ' ',

#     # show now own tickets in customer panel, CompanyTickets
#     CustomerUserExcludePrimaryCustomerID => 0,
#     # generate auto logins
#     AutoLoginCreation => 0,
#     # generate auto login prefix
#     AutoLoginCreationPrefix => 'auto',
#     # admin can change customer preferences
#     AdminSetPreferences => 1,
#     # use customer company support (reference to company, See CustomerCompany
↳settings)
    CustomerCompanySupport => 1,
    # cache time to live in sec. - cache any database queries
    CacheTTL => 60 * 60 * 24,
#     # Consider this source read only.
#     ReadOnly => 1,
    Map => [

```

```

# Info about dynamic fields:
#
# Dynamic Fields of type CustomerUser can be used within the mapping (see
↪example below).
# The given storage (third column) then can also be used within the
↪following configurations (see above):
# CustomerUserSearchFields, CustomerUserPostMasterSearchFields,
↪CustomerUserListFields, CustomerUserNameFields
#
# Note that the columns 'frontend' and 'readonly' will be ignored for
↪dynamic fields.

# note: Login, Email and CustomerID needed!
# var, frontend, storage, shown (1=always,2=lite), required, storage-type,
↪ http-link, readonly, http-link-target, link class(es)
[ 'UserTitle',      Translatable('Title or salutation'), 'title',      ↪
↪ 1, 0, 'var', '', 0, undef, undef ],
[ 'UserFirstname',  Translatable('Firstname'),          'first_name', ↪
↪ 1, 1, 'var', '', 0, undef, undef ],
[ 'UserLastname',   Translatable('Lastname'),          'last_name',  ↪
↪ 1, 1, 'var', '', 0, undef, undef ],
[ 'UserLogin',      Translatable('Username'),          'login',      ↪
↪ 1, 1, 'var', '', 0, undef, undef ],
[ 'UserPassword',   Translatable('Password'),          'pw',         ↪
↪ 0, 0, 'var', '', 0, undef, undef ],
[ 'UserEmail',      Translatable('Email'),            'email',      ↪
↪ 1, 1, 'var', '', 0, undef, undef ],
# [ 'UserEmail',      Translatable('Email'),            'email',      ↪
↪ 1, 1, 'var', "[% Env(\"CGIHandle\") %]?Action=AgentTicketCompose;ResponseID=1;
↪TicketID=[% Data.TicketID | uri %];ArticleID=[% Data.ArticleID | uri %]'", 0, '',
↪'AsPopup OTOBOPopup_TicketAction' ],
[ 'UserCustomerID', Translatable('CustomerID'),          'customer_id',↪
↪ 0, 1, 'var', '', 0, undef, undef ],
# [ 'UserCustomerIDs', Translatable('CustomerIDs'),          'customer_ids
↪', 1, 0, 'var', '', 0, undef, undef ],
[ 'UserPhone',      Translatable('Phone'),          'phone',      ↪
↪ 1, 0, 'var', '', 0, undef, undef ],
[ 'UserFax',        Translatable('Fax'),            'fax',        ↪
↪ 1, 0, 'var', '', 0, undef, undef ],
[ 'UserMobile',     Translatable('Mobile'),          'mobile',     ↪
↪ 1, 0, 'var', '', 0, undef, undef ],
[ 'UserStreet',     Translatable('Street'),          'street',     ↪
↪ 1, 0, 'var', '', 0, undef, undef ],
[ 'UserZip',        Translatable('Zip'),            'zip',        ↪
↪ 1, 0, 'var', '', 0, undef, undef ],
[ 'UserCity',       Translatable('City'),            'city',       ↪
↪ 1, 0, 'var', '', 0, undef, undef ],
[ 'UserCountry',    Translatable('Country'),          'country',    ↪
↪ 1, 0, 'var', '', 0, undef, undef ],
[ 'UserComment',    Translatable('Comment'),          'comments',   ↪
↪ 1, 0, 'var', '', 0, undef, undef ],
[ 'ValidID',        Translatable('Valid'),            'valid_id',   ↪
↪ 0, 1, 'int', '', 0, undef, undef ],

# Dynamic field example
# [ 'DynamicField_Name_X', undef, 'Name_X', 0, 0, 'dynamic_field', undef, 0,
↪ undef, undef ],
],

```

```

# default selections
Selections => {

#       UserTitle => {
#           'Mr.' => Translatable('Mr.'),
#           'Mrs.' => Translatable('Mrs.'),
#       },
#   },
};

```

If you want to customize the customer user data, change the columns or add new ones to the `customer_user` table in the database.

For example, to add a new field for room number:

1. Add a new column `room` to table `customer_user`.

MySQL or MariaDB:

```
root> mysql -u root -p -e 'ALTER TABLE otobo.customer_user ADD room VARCHAR (250)'
```

PostgreSQL (from the `/opt/otobo` directory):

```
otobo> psql -c 'ALTER TABLE customer_user ADD COLUMN room varchar(250)'
```

2. Copy the `$Self->{CustomerUser}` section from `Kernel/Config/Defaults.pm` into `Kernel/Config.pm`.
3. Add the new column to the `Map` array.

```
[ 'UserRoom', 'Room', 'room', 0, 1, 'var', '', 0, undef, undef ],
```

You can set the HTTP link target and link class (the last two keys) to `undef` in map array elements, if they are not to be used. These keys add `target=""` and `class=""` attributes to the HTTP link element, respectively. They are ignored if HTTP link is not set (it is `' '` in this example).

☞: It is recommended to always use English words for names.

☞:

Names can be translated into other languages with custom translation files. See the [Custom Translation File](#) chapter in the developer manual.

LDAP

If you have an LDAP directory with your customer user data, you can use it as the customer user back end. The example below shows the configuration of a LDAP customer user back end.

```

# CustomerUser
# (customer user ldap backend and settings)
$Self->{CustomerUser} = {
    Name => 'LDAP Backend',
    Module => 'Kernel::System::CustomerUser::LDAP',
    Params => {
        # ldap host

```

```

Host => 'bay.csuhayward.edu',
# ldap base dn
BaseDN => 'ou=seas,o=csuh',
# search scope (one|sub)
SSCOPE => 'sub',
# The following is valid but would only be necessary if the
# anonymous user does NOT have permission to read from the LDAP tree
UserDN => '',
UserPw => '',
# in case you want to add always one filter to each ldap query, use
# this option. e. g. AlwaysFilter => '(mail=*)' or AlwaysFilter =>
↪ '(objectclass=user)'
AlwaysFilter => '',
# if the charset of your ldap server is iso-8859-1, use this:
# SourceCharset => 'iso-8859-1',
# die if backend can't work, e. g. can't connect to server
Die => 0,
# Net::LDAP new params (if needed - for more info see perldoc Net::LDAP)
Params => {
    port      => 389,
    timeout   => 120,
    async     => 0,
    version   => 3,
},
},
# customer unique id
CustomerKey => 'uid',
# customer #
CustomerID => 'mail',
CustomerUserListFields => ['cn', 'mail'],
CustomerUserSearchFields => ['uid', 'cn', 'mail'],
CustomerUserSearchPrefix => '',
CustomerUserSearchSuffix => '*',
CustomerUserSearchListLimit => 250,
CustomerUserPostMasterSearchFields => ['mail'],
CustomerUserNameFields => ['givenname', 'sn'],
# Configures the character for joining customer user name parts. Join single ↵
↪ space if it is not defined.
CustomerUserNameFieldsJoin => '',
# show customer user and customer tickets in the external interface
CustomerUserExcludePrimaryCustomerID => 0,
# add a ldap filter for valid users (expert setting)
# CustomerUserValidFilter => '(! (description=gesperrt))',
# admin can't change customer preferences
AdminSetPreferences => 0,
# cache time to live in sec. - cache any ldap queries
# CacheTTL => 0,
Map => [
    # note: Login, Email and CustomerID needed!
    # var, frontend, storage, shown (1=always,2=lite), required, storage-type,
↪ http-link, readonly, http-link-target, link class(es)
    [ 'UserTitle',      Translatable('Title or salutation'), 'title',      ↵
↪ 1, 0, 'var', '', 1, undef, undef ],
    [ 'UserFirstname',  Translatable('Firstname'),      'givenname',  ↵
↪ 1, 1, 'var', '', 1, undef, undef ],
    [ 'UserLastname',   Translatable('Lastname'),      'sn',         ↵
↪ 1, 1, 'var', '', 1, undef, undef ],
    [ 'UserLogin',      Translatable('Username'),      'uid',        ↵
↪ 1, 1, 'var', '', 1, undef, undef ],

```

```

    [ 'UserEmail',      Translatable('Email'),      'mail',
    ↪ 1, 1, 'var', '', 1, undef, undef ],
    [ 'UserCustomerID', Translatable('CustomerID'), 'mail',
    ↪ 0, 1, 'var', '', 1, undef, undef ],
    # [ 'UserCustomerIDs', Translatable('CustomerIDs'), 'second_
    ↪customer_ids', 1, 0, 'var', '', 1, undef, undef ],
    [ 'UserPhone',      Translatable('Phone'),      'telephonenumber
    ↪', 1, 0, 'var', '', 1, undef, undef ],
    [ 'UserAddress',    Translatable('Address'),    'postaladdress',
    ↪ 1, 0, 'var', '', 1, undef, undef ],
    [ 'UserComment',    Translatable('Comment'),    'description',
    ↪ 1, 0, 'var', '', 1, undef, undef ],

    # this is needed, if "SMIME::FetchFromCustomer" is active
    # [ 'UserSMIMECertificate', 'SMIMECertificate', 'userSMIMECertificate', 0, 1,
    ↪ 'var', '', 1, undef, undef ],

    # Dynamic field example
    # [ 'DynamicField_Name_X', undef, 'Name_X', 0, 0, 'dynamic_field', undef,
    ↪0, undef, undef ],
    ],
};

```

To activate and configure the LDAP back end:

1. Copy the `$Self->{CustomerUser}` section from `Kernel/Config/Defaults.pm` into `Kernel/Config.pm`.
2. Remove the comments (`#` characters) from the beginning of the lines.

If additional customer user attributes are stored in your LDAP directory, such as a manager name, a mobile phone number, or a department, this information can be displayed in OTOBO.

To display additional customer user attributes from LDAP directory:

1. Expand the `Map` array in `Kernel/Config.pm` with the entries for these attributes.

```

[ 'UserMobilePhone', 'Mobile Phone', 'mobilephone', 1, 0, 'var', '', 1, undef,
↪undef ],

```

☞: It is recommended to always use English words for names.

☞:

Names can be translated into other languages with custom translation files. See the [Custom Translation File](#) chapter in the developer manual.

4.6.4 Multiple Customer User Back Ends

If you want to use more than one customer user data source, the `CustomerUser` configuration parameter should be expanded with a number, like `CustomerUser1` and `CustomerUser2`.

The following configuration example shows usage of both a database and an LDAP customer user back end.

```

# Data source 1: customer user database back end and settings.
$Self->{CustomerUser1} = {

```

```

Name => 'Database Backend',
Module => 'Kernel::System::CustomerUser::DB',
Params => {
    DSN => 'DBI:odbc:yourdsn',
    DSN => 'DBI:mysql:database=customerdb;host=customerdbhost',
    User => '',
    Password => '',
    Table => 'customer_user',
},
# Other setting here.
};

# Data source 2: customer user LDAP back end and settings.
$self->{CustomerUser2} = {
    Name => 'LDAP Backend',
    Module => 'Kernel::System::CustomerUser::LDAP',
    Params => {
        Host => 'bay.csuhayward.edu',
        BaseDN => 'ou=seas,o=csuh',
        SSCOPE => 'sub',
        UserDN => '',
        UserPw => '',
        AlwaysFilter => '',
        Die => 0,
        Params => {
            port => 389,
            timeout => 120,
            async => 0,
            version => 3,
        },
    },
},
# Other setting here.
};

```

It is possible to integrate up to 10 different customer back ends. Use the `CustomerUser` screen to view or edit (assuming write access is enabled) all customer user data.

4.6.5 Customer User Data in Dynamic Fields

Sometimes it can be useful to also store customer user data directly in dynamic fields of a ticket, for example to create special statistics on this data.

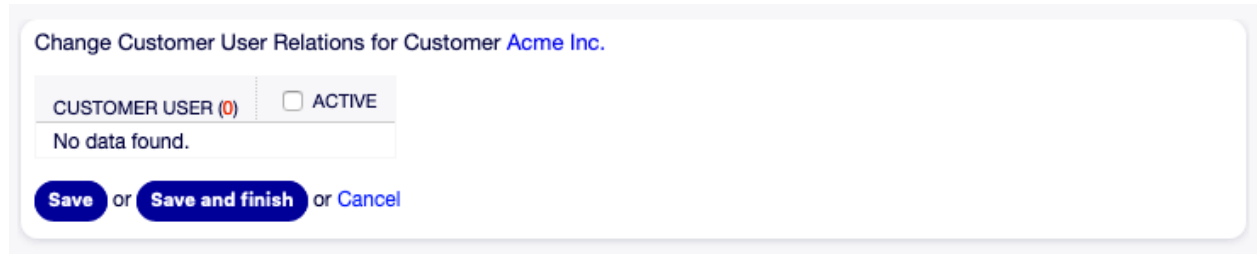
The dynamic field values are set, when a ticket is created or when the customer user of a ticket is changed. The values of the dynamic fields are taken from the customer user data. This works for all back ends, but is especially useful for LDAP back ends.

To activate this optional feature:

1. Activate the setting `Ticket::EventModulePost###4100-DynamicFieldFromCustomerUser`.
2. Activate the setting `DynamicFieldFromCustomerUser::Mapping`. This setting contains the configuration of which customer user field entry should be stored in which ticket dynamic field.
3. Create the dynamic fields, if the dynamic fields are not present in the system yet.
4. Enable the dynamic fields in setting `Ticket::Frontend::AgentTicketFreeText###DynamicField`, so that they can be set manually.

1. 2. 3.

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



4.26: 1000

1000

1000

1000

1000

4.8 1000

1000

OTOBO allows you to assign group permissions to customer users. Access works just the same as for agents, preventing a customer from modifying and viewing a request. Thus allowing the customer to focus on the results of the original communication and funneling the discussion through one ticket.

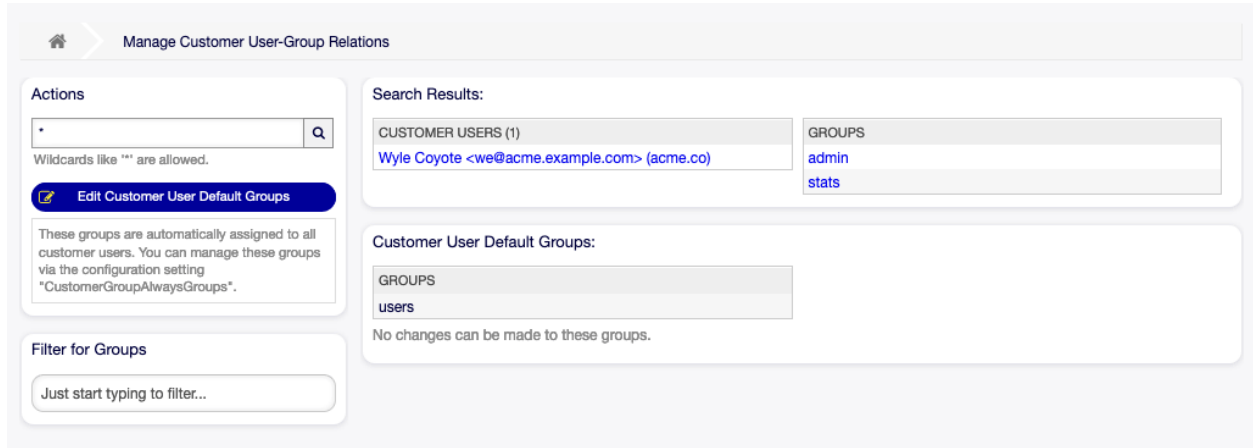
1000

1000

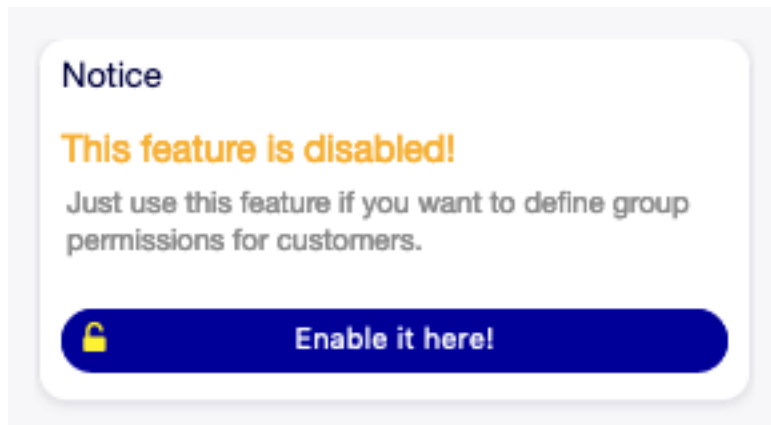
1000

Customer group support needs to be enabled in at least one customer user back end to use this function. For the default OTOBO back end, this can be enabled in the system configuration by clicking on the Enable it here! button.

Kernel/Config/Files ZZZ_CustomerBackend.pm



4.27: Manage Customer User-Group Relations



4.28: This feature is disabled!

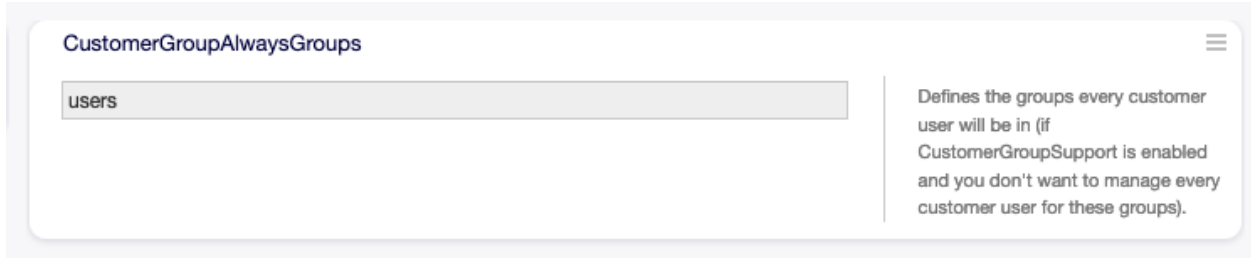


Figure 4.31: CustomerGroupAlwaysGroups configuration

Figure 4.31: CustomerGroupAlwaysGroups configuration

4.8.2 Managing Customer Users

Managing customer users involves several steps, including creating and editing user profiles.

For more information, see the [Customer User Management](#) section.

For more information, see the [Customer User Management](#) section.

Figure 4.31: CustomerGroupAlwaysGroups configuration

4.9 Managing Customer User-Service Relations

Managing customer user-service relations allows you to assign services to specific customer users. This section describes the process of managing these relations.

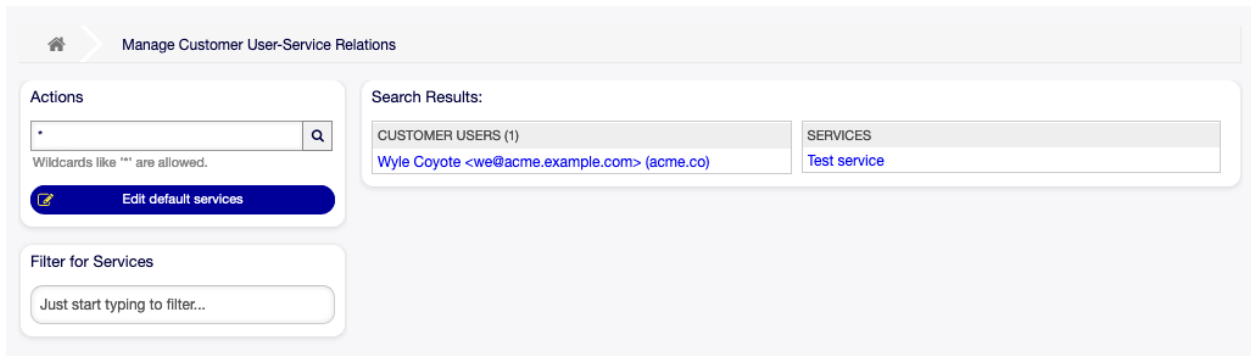


Figure 4.32: Managing Customer User-Service Relations

4.9.1 Managing Customer User-Service Relations

Managing customer user-service relations involves several steps, including creating and editing user profiles.

1. Create a new customer user profile.
2. Assign services to the customer user profile.

3. Click on the **Test service** link

Allocate Services to Customer User **Wyle Coyote (we)**

SERVICE	<input type="checkbox"/> ACTIVE
Test service	<input type="checkbox"/>

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

4.33: Allocation dialog

Click on the **Test service** link

- Click on the **Test service** link
- Click on the **Test service** link
- Click on the **Test service** link

Allocate Customer Users to Service **Test service**

CUSTOMER (1)	<input type="checkbox"/> ACTIVE
Wyle Coyote <we@acme.example.com> (acme.co)	<input type="checkbox"/>

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

4.34: Allocation dialog

Click on the **Test service** link

Click on the **Test service** link

Click on the **Test service** link

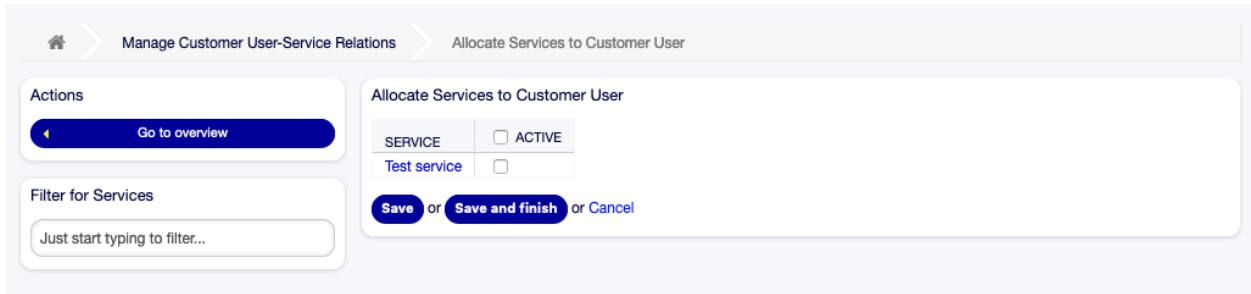
Click on the **Test service** link

4.9.2 Allocation

Click on the **Test service** link

Click on the **Test service** link

- Click on the **Test service** link
- Click on the **Test service** link
- Click on the **Test service** link

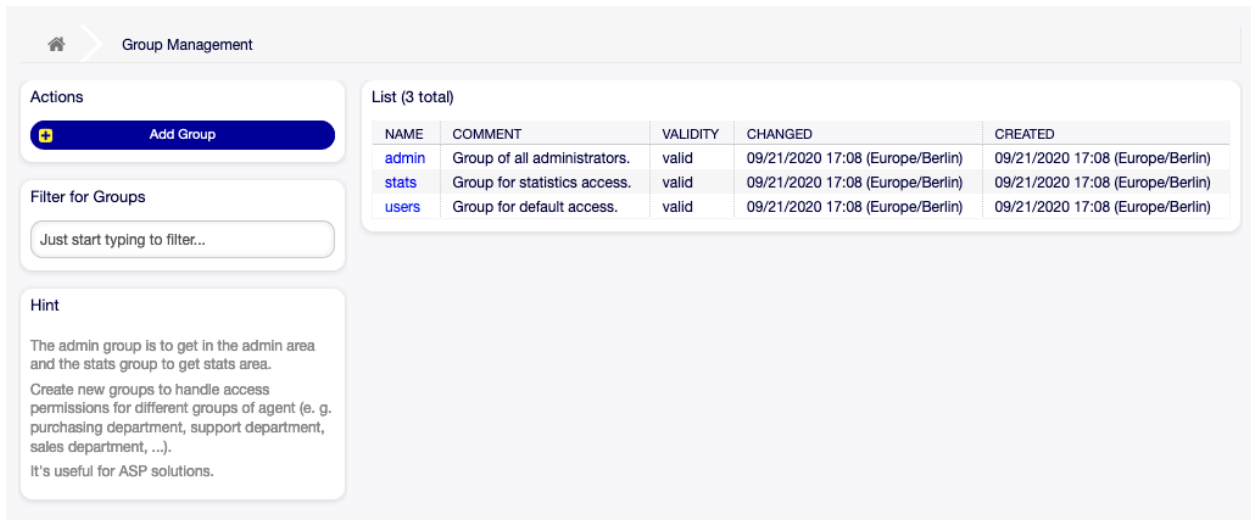


4.35: Allocate Services to Customer User

Figure 4.35: Allocate Services to Customer User

4.10 Groups

Use this screen to add groups to the system. A fresh OTOBO installation contains some default groups. The group management screen is available in the Groups module of the Users, Groups & Roles group.



4.36: Group Management

4.10.1 Add Group

Procedure

1. Click on the Add Group button.
2. Enter the group name.
3. Click on the Save button.

Figure 4.36: Group Management

Add Group

★ Name:

★ Validity:

Comment:

Save or Cancel

4.37: Add Group

Procedure

1. Click Add Group
2. Add Group
3. Add Group to Resource

Edit Group

★ Name:

★ Validity:

Comment:

Save or **Save and finish** or Cancel

4.38: Edit Group

Notes: This procedure is for adding a group to a resource.

4.10.2 Renaming

Procedure

- ★ Renaming a group

Notes: Renaming a group does not affect permissions previously given. When group1 is now called group2, then all the permissions are the same for the users which used to be assigned to group1. This result is because OTOBO uses IDs for the relationship, and not the name.

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

Notes: This procedure is for setting the validity of a resource.

...

4.10.3

...

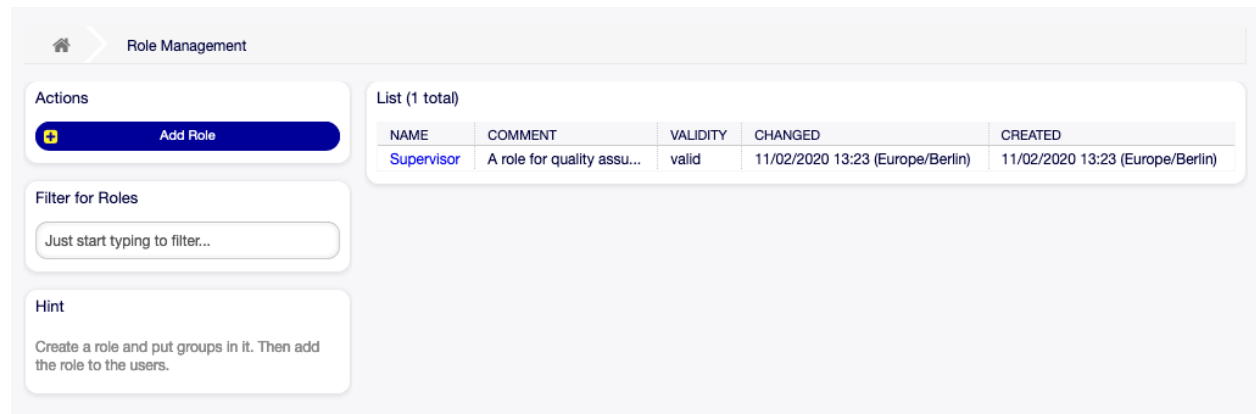
admin ...

stats Qualified to access the stats module of OTOBO and generate statistics.

users ...

4.11

Use this screen to add roles to the system. A fresh OTOBO installation contains no roles by default. The role management screen is available in the Roles module of the Users, Groups & Roles group.



4.39: ...

4.11.1

...

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

...: ...

...

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

Add Role

★ Name:

★ Validity:

Comment:

Save or **Cancel**

4.40: Add Role

Edit Role

★ Name:

★ Validity:

Comment:

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

4.41: Edit Role

Figure 4.40: Add Role

4.11.2 Validity

Validity is a field that can be used to control the use of a resource.

* Validity can be set to valid, invalid, or invalid-temporarily.

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

Figure 4.41: Edit Role

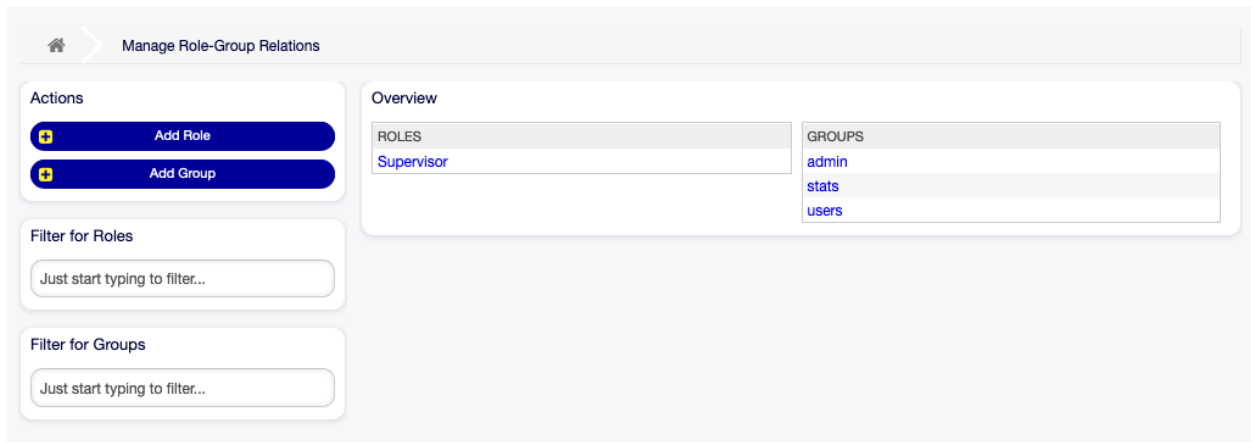
4.12 Roles

Roles are used to define the permissions of users in the system. Roles can be assigned to users and resources.

4.12.1 Roles and Resources

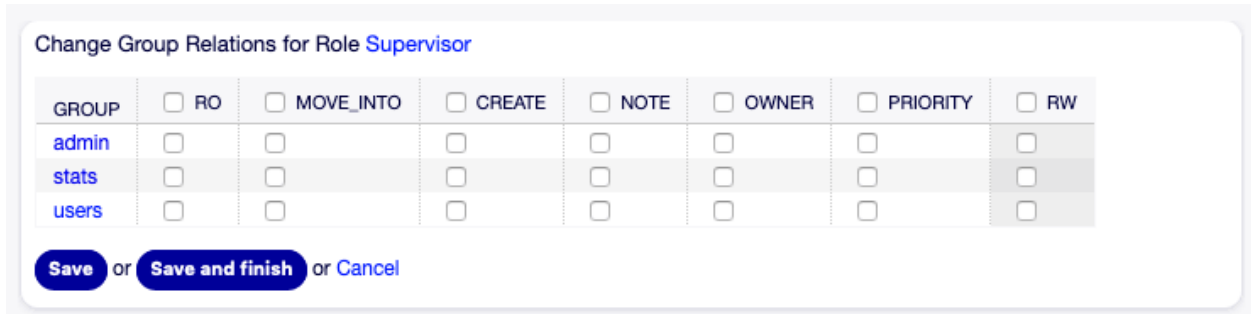
Roles and Resources

1. Roles and Resources
2. Roles and Resources



4.42: Manage Role-Group Relations

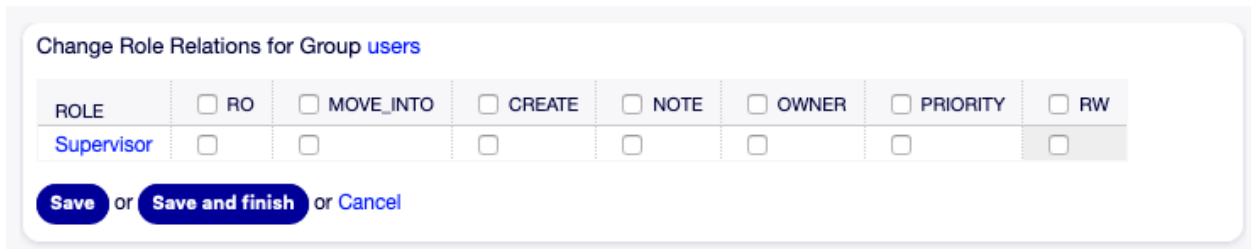
3. Manage Role-Group Relations



4.43: Change Group Relations for Role Supervisor

Change Role-Group Relations

1. Manage Role-Group Relations
2. Change Role-Group Relations
3. Manage Role-Group Relations



4.44: Change Role Relations for Group users

OTOB Administration Manual, 10.1

OTOB Administration Manual, 10.1

rw: rwxrwxrwx

4.12.2 4.12.2 4.12.2

4.12.2 4.12.2 4.12.2

ro: rwxrwxrwx 'rw'rw

rw rwxrwxrwx/rwxrwx

create: rwxrwxrwx/rwxrwxrwxrwx

note: rwxrwxrwx/rwxrwxrwxrwx

owner: rwxrwxrwx/rwxrwxrwxrwxrwx

priority: rwxrwxrwx/rwxrwxrwxrwxrwx

4.12.2 4.12.2 4.12.2

4.12.2 4.12.2 4.12.2

4.12.2 4.12.2 4.12.2/rwxrwxrwxrwxrwxrwxrwxrwx

rw: rwxrwxrwx/rwxrwxrwxrwxrwx

rw:

Not all available permissions are shown by default. See `System::Permission` setting for permissions that can be added. These additional permissions can be added:

stats: rwxrwxrwx

rw rwxrwxrwxrwx rwxrwxrwxrwx

rw rwxrwxrwxrwx

rw rwxrwxrwxrwx

rw rwxrwxrwxrwx"rw"rwxrwx

rw rwxrwxrwxrwxrwx

rw rwxrwxrwxrwxrwx

rw rwxrwxrwxrwxrwxrwx

rw: rwxrwxrwxrwxrwxrwxrwxrwxrwxrwx rw rwxrwxrwxrwxrwxrwxrwxrwx

OTOBOT offers many options to automate tasks based on events, time, external systems and defined processes. OTOBO also includes the possibility to add individual information types to tickets and help agents to lower their error rate when working with tickets by allowing only defined activities for tickets in specific states.

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5.1 Access Control Lists (ACL)

OTOBOT uses access control lists (ACL) to restrict agents and customer users on ticket options, allowing only correct and meaningful activities with a ticket. OTOBO administrators can easily generate ACLs in the graphical interface to prevent ticket closure until meeting specific requirements, prevent tickets from being moved to queues before adding the defined information and much more.

OTOBOT uses access control lists (ACL) to restrict agents and customer users on ticket options, allowing only correct and meaningful activities with a ticket. OTOBO administrators can easily generate ACLs in the graphical interface to prevent ticket closure until meeting specific requirements, prevent tickets from being moved to queues before adding the defined information and much more.

Use this screen to manage access control lists in the system. A fresh OTOBO installation contains no access control lists by default. The access control lists management screen is available in the Access Control Lists (ACL) module of the Processes & Automation group.

5.1.1 Access Control Lists

OTOBOT offers many options to automate tasks based on events, time, external systems and defined processes. OTOBO also includes the possibility to add individual information types to tickets and help agents to lower their error rate when working with tickets by allowing only defined activities for tickets in specific states.

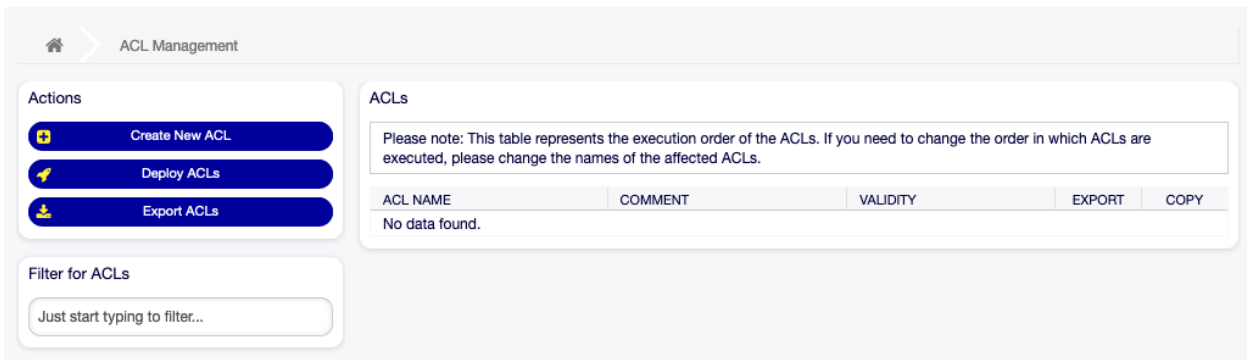


Figure 5.1: ACL Management

Figure 5.1: ACL Management

ACL Management

1. Create New ACL
2. Deploy ACLs
3. Export ACLs
4. Filter for ACLs

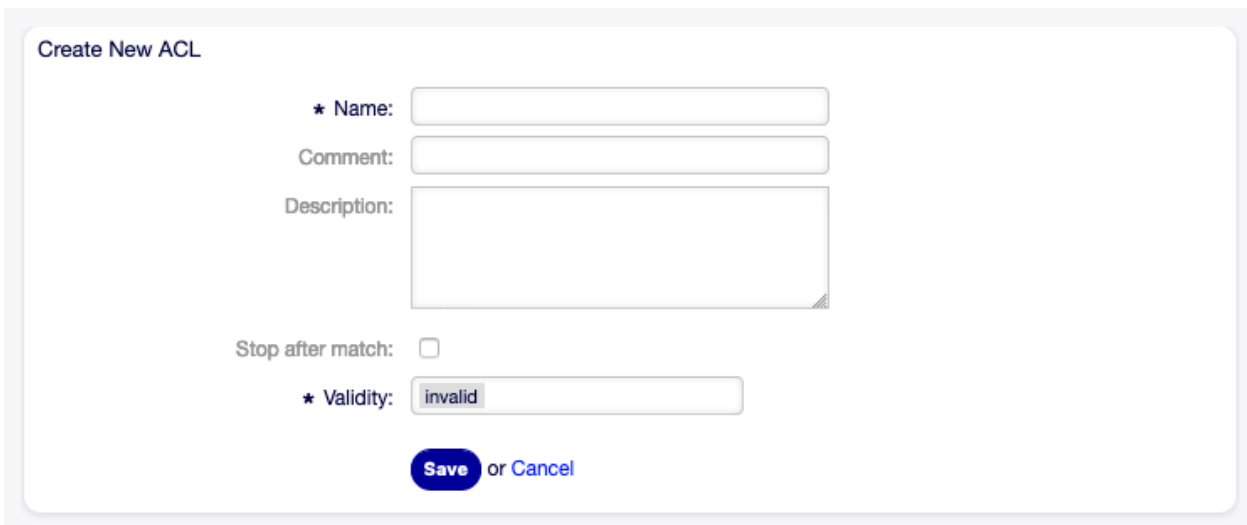


Figure 5.2: Create New ACL

ACL Management

1. Create New ACL
2. Deploy ACLs
3. Export ACLs
4. Filter for ACLs

ACL Management

▼ Edit ACL Information

* Name:

Comment:

Description:

Stop after match:

* Validity:

▼ Edit ACL Structure

Match settings

▼ Properties

▼ Queue

Raw:

Change settings

▼ Possible

▼ Ticket

▼ Action

Save ACL

or or

5.3: ACL

1. ACL
2. ACL
3. ACL
4. ACL
5. ACL
6. ACL

```
ACL_Perl zzzacl.pm
```

ACL

1. ACL

```
ACL
```

ACL

1. ACL
2. Export_ACL.yml

ACL

1. ...
2. .yml
3. ACL
4. ACL
5. ACL

```
ACL
```

```
ACL
```

5.1.2 ACL

*

ACL

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

5.1.3 ACL

ACL

Properties ACL

PropertiesDatabase Properties

Possible

PossibleAdd Possible PossibleNot A-CL

PossibleNot Possible PossibleNot ACL

ACL

[Not] [Not] 2 low 1 very low 3 normal 4 high 5 very high

[RegExp] [RegExp] low 1 very low 2 low

[regexp] "[RegExp]"

[NotRegExp] [NotRegExp] low 3 normal 4 high 5 very high

[Notregexp] [NotRegExp]

5.1.4 ACL

5 very high

100-Example-ACL ACL

Raw 5 very high Raw 3 normal A-CL 5 very high

Possible Alert

: ACL

Create New ACL

★ Name:

Comment:

Description:

Stop after match:

★ Validity:

or

5.4: 100-Example-ACL - 100%

▼ Edit ACL Structure

Match settings

▼ Properties

▼ Ticket

Queue:

Priority:

Change settings

5.5: 100-Example-ACL - 100%

▼ Edit ACL Structure

Match settings

▼ Properties

▼ Ticket

Queue:

raw × Exact match ▾ ⊕

Priority:

5 very high × Exact match ▾ ⊕

⊕

⊕

Change settings

▼ Possible

▼ Ticket

Queue:

Alert × Exact match ▾ ⊕

⊕

⊕

5.6: 100-Example-ACL - 10000

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXX Raw XXXXXXXX 5 very high XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXACLXXXXXXXXXXXXXXXXXXXX

The screenshot shows a web interface for editing ACL structure. It is divided into two main sections: 'Match settings' and 'Change settings'.
Match settings:
- A dropdown menu is set to 'PropertiesDatabase'.
- A sub-section 'Ticket' is expanded, showing:
 - 'Queue:' with a 'Raw' tag, a dropdown set to 'Exact match', and an empty input field.
 - 'Priority:' with a '5 very high' tag, a dropdown set to 'Exact match', and an empty input field.
 - Three empty input fields below, each preceded by a plus sign (+).
Change settings:
- A dropdown menu is set to 'Possible'.
- A sub-section 'Ticket' is expanded, showing:
 - 'Queue:' with an 'Alert' tag, a dropdown set to 'Exact match', and an empty input field.
 - Two empty input fields below, each preceded by a plus sign (+).

Figure 5.7: 101-Example-ACL

XXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXX Raw XXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXX

XXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXX XXXXXXXX XXXACL
XX

▼ Edit ACL Structure

Match settings

▼ Properties

▼ Ticket

Queue:

Raw x Exact match ▾

Change settings

▼ Possible

▼ Ticket

State:

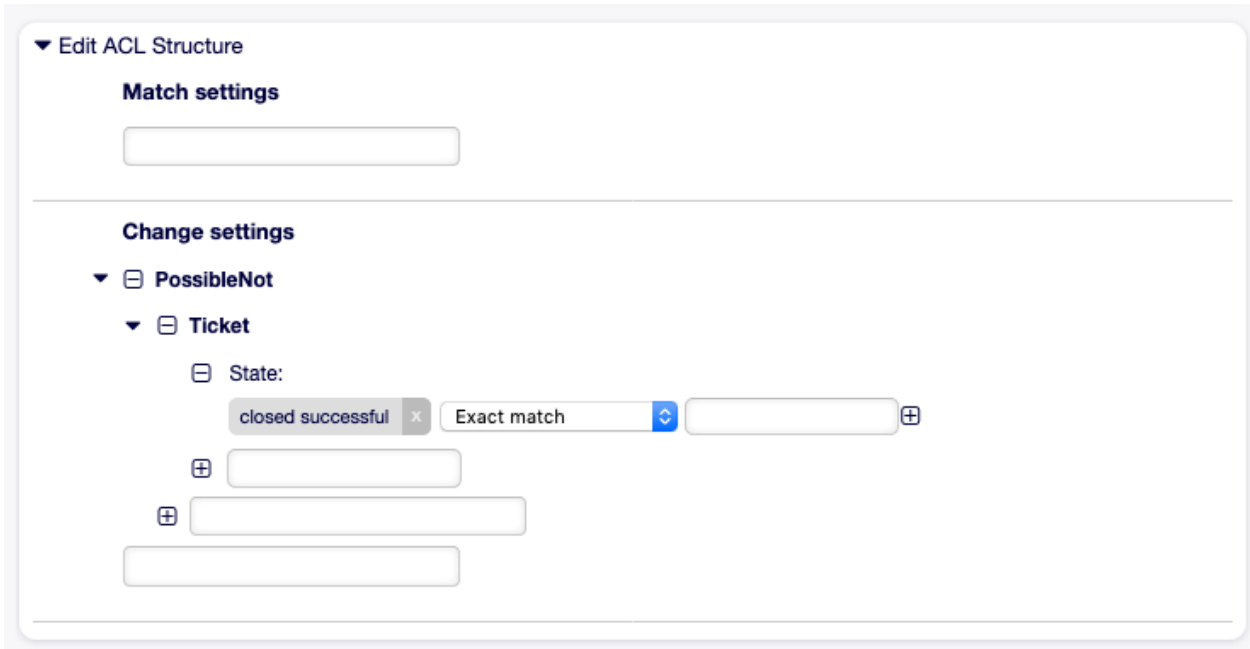
new x open x pending reminder x Exact match ▾

▼ PossibleNot

▼ Action

AgentTicketClose x

5.8: 102-Example-ACL



5.9: 103-Example-ACL

ACL HW Hardware

ACL ID TheCustomerID P14

Disallow Standard Reply Function For Customers in Process

This ACL prohibits using the reply button in CustomerTicketZoom if the ticket is a process ticket of the process with entity ID Process-0123456789abcdef.

5.1.5 ACL

Properties, keys and values that can be used in ACLs are highly dependent on the OTOBO installation. For example the possibilities can be extended by installing extension modules, as well as it can depend on the customer user mapping set in Config.pm. Therefore it is not possible to provide a full ACL reference, that contains all settings.

ACL YAML ACL

```

---
- ChangeBy: root@localhost
  ChangeTime: 2019-01-07 10:42:59
  Comment: ACL Reference.
  ConfigMatch:
    Properties:
      # Match properties (current values from the form).
    
```

▼ Edit ACL Structure

Match settings

▼ Properties

▼ Ticket

Queue:

[RegExp]HW × Regular expression ▾

⊕

⊕

Change settings

▼ Possible

▼ Ticket

Queue:

[RegExp]^Hardware × Regular expression ▾

⊕

⊕

5.10: 104-Example-ACL

▼ Edit ACL Structure

Match settings

▼ Properties

▼ CustomerUser

UserCustomerID:

TheCustomerID x Exact match

+

+

+

Change settings

▼ PossibleNot

▼ Process

P14 x Exact match

+

+

+

5.11: 105-Example-ACL

▼ Edit ACL Structure

Match settings

▼ Properties

▼ Process

ProcessEntityID:

Process-01234567890abcdef

Change settings

▼ PossibleNot

▼ Action

CustomerTicketZoomReply

5.12: 106-Example-ACL

```

CustomerUser:
  UserLogin:
    - some login
  UserCustomerID:
    - some customer ID
  Group_rw:
    - some group
DynamicField:
  # Names must be in DynamicField_<field_name> format.
  # Values for dynamic fields must always be the untranslated internal
  # data keys specified in the dynamic field definition and not the
  # data values shown to the user.
  DynamicField_Field1:
    - some value
  DynamicField_OtherField:
    - some value
  DynamicField_TicketFreeText2:
    - some value
  # more dynamic fields
Frontend:
  Action:
    - AgentTicketPhone
    - AgentTicketEmail
    - ...
    - CustomerTicketZoomReply
  Endpoint:
    - ExternalFrontend::PersonalPreferences
    - ExternalFrontend::ProcessTicketCreate
    - ExternalFrontend::ProcessTicketNextStep
    - ExternalFrontend::TicketCreate
    - ExternalFrontend::TicketDetailView
    - ...
Owner:
  UserLogin:
    - some login
  Group_rw:
    - some group
  Role:
    - admin
  # more owner attributes
Priority:
  ID:
    - some ID
  Name:
    - some name
  # more priority attributes
Process:
  ProcessEntityID:
    # the process that the current ticket is part of
    - Process-9c378d7cc59f0fce4cee7bb9995ee3eb
  ActivityEntityID:
    # the current activity of the ticket
    - Activity-f8b2fdebe54eeb7b147a5f8e1da5e35c
  ActivityDialogEntityID:
    # the current activity dialog that the agent/customer is using
    - ActivityDialog-aff0ae05fe6803f38de8ff6cf33b7ce
Queue:
  Name:

```

```

- Raw
QueueID:
- some ID
GroupID:
- some ID
Email:
- some email
RealName:
- OTOBO System
# more queue attributes
Responsible:
UserLogin:
- some login
Group_rw:
- some group
Role:
- admin
# more responsible attributes
Service:
ServiceID:
- some ID
Name:
- some name
ParentID:
- some ID
# more service attributes
SLA:
SLAID:
- some ID
Name:
- some name
Calendar:
- some calendar
# more SLA attributes
State:
ID:
- some ID
Name:
- some name
TypeName:
- some state type name
TypeID:
- some state type ID
# more state attributes
Ticket:
Queue:
- Raw
State:
- new
- open
Priority:
- some priority
Lock:
- lock
CustomerID:
- some ID
CustomerUserID:
- some ID

```

```

    Owner:
    - some owner
    DynamicField_Field1:
    - some value
    DynamicField_MyField:
    - some value
    # more ticket attributes
Type:
    ID:
    - some ID
    Name:
    - some name
    # more type attributes
User:
    UserLogin:
    - some_login
    Group_rw:
    - some group
    Role:
    - admin
PropertiesDatabase:
    # Match properties (existing values from the database).
    # Please note that Frontend is not in the database, but in the framework.
    # See section "Properties", the same configuration can be used here.
ConfigChange:
    Possible:
    # Reset possible options (white list).
    # Hide or show Dynamicfields
    # Please just enter the name of the Dynamic Fields, they don't need any prefix.
    Form:
    - SomeDynamicFieldName
    - someOtherDynamicFieldName
    # Hide or show Standard Fields like Article (in the future Queue, Service, etc.)
    FormStd:
    # Hide or show Article in CustomerTicketMessage (including all three: Subject,
↪Body and Attachment)
    - Article
    Action:
    # Possible action options (white list).
    - AgentTicketBounce
    - AgentTicketPhone    # only used to show/hide the Split action
    - AgentLinkObject     # only used to show/hide the Link action
    - ...
    ActivityDialog:
    # Limit the number of possible activity dialogs the agent/customer can use in a
↪process ticket.
    - ActivityDialog-aff0ae05fe6803f38de8fff6cf33b7ce
    - ActivityDialog-429d61180a593414789a8087cc4b3c6f
    - ...
    Endpoint:
    # Limit the functions on external interface.
    - ExternalFrontend::PersonalPreferences
    - ExternalFrontend::ProcessTicketCreate
    - ExternalFrontend::ProcessTicketNextStep
    - ExternalFrontend::TicketCreate
    - ExternalFrontend::TicketDetailView
    - ...
    Process:

```

```

# Limit the number of possible processes that can be started.
- Process-9c378d7cc59f0fce4cee7bb9995ee3eb
- Process-12345678901234567890123456789012
- ...
Ticket:
# Possible ticket options (white list).
Queue:
- Raw
- some other queue
State:
- some state
Priority:
- 5 very high
DynamicField_Field1:
- some value
DynamicField_MyField:
- some value
# more dynamic fields
NewOwner:
# For ticket action screens, where the Owner is already set.
- some owner
OldOwner:
# For ticket action screens, where the Owner is already set.
- some owner
Owner:
# For ticket create screens, because Owner is not set yet. Please make sure, ↵
↳that you enter "Firstname Lastname".
- some owner
SLA:
- some sla-name
# more ticket attributes
PossibleAdd:
# Add options (white list).
# See section "Possible", the same configuration can be used here.
PossibleNot:
# Remove options (black list).
# See section "Possible", the same configuration can be used here.
CreateBy: root@localhost
CreateTime: 2019-01-07 10:42:59
Description: This is the long description of the ACL to explain its usage.
ID: 1
Name: 200-ACL-Reference
StopAfterMatch: 0
ValidID: 3

```

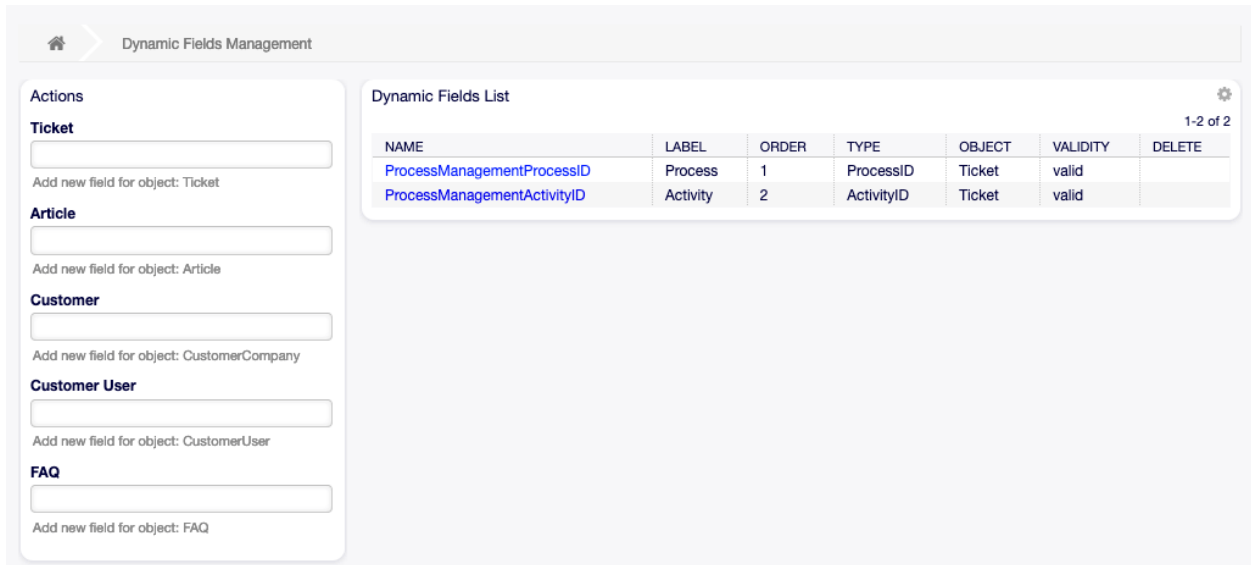
5.2 5.2.1

Beside general information required for all tickets, organizations have individual needs to add specific details to tickets. This needed information takes various formats like texts, integers, date-time and more.

OTOBO supports adding a so-called [dynamic field](#) to handle texts, integers, drop-down lists, multi-select fields, date-time, checkboxes and more. OTOBO administrators can define where those fields should be visible or editable, and of course, the dynamic fields are also available in statistics and reports.

Use this screen to manage dynamic fields in the system. A fresh OTOBO installation contains two

dynamic fields by default. The dynamic field management screen is available in the Dynamic Fields module of the Processes & Automation group.



5.13: Dynamic Fields Management

5.2.1 Adding Dynamic Fields

To add a dynamic field:

1. Choose an object type in the left actions sidebar and select a dynamic field type from its dropdown.
2. Select a dynamic field type.
3. Enter the field name.

To edit a dynamic field:

1. Click on a dynamic field in the dynamic fields list.
2. Select the field.
3. Edit the field name and validity.

To delete a dynamic field:

1. Select the dynamic field to delete.
2. Click the delete icon.

For more information, see the Dynamic Fields Management user guide.

5.2.2 Managing Dynamic Fields

To manage dynamic fields:

General

★ Name: Validity:
Must be unique and only accept alphabetic and numeric characters.

★ Label: Field type:
This is the name to be shown on the screens where the field is active.

★ Field order: Object type:
This is the order in which this field will be shown on the screens where is active.

Checkbox Field Settings

Default value:
This is the default value for this field.

5.14: 0000000000

General

★ Name: Validity:
Must be unique and only accept alphabetic and numeric characters.

★ Label: Field type:
This is the name to be shown on the screens where the field is active.

★ Field order: Object type:
This is the order in which this field will be shown on the screens where is active.

5.15: 0000000000

Dynamic Fields List 1-2 of 2

NAME	LABEL	ORDER	TYPE	OBJECT	VALIDITY	DELETE
ProcessManagementProcessID	Process	1	ProcessID	Ticket	valid	
ProcessManagementActivityID	Activity	2	ActivityID	Ticket	valid	

5.16: 0000000000

Figure 5.17: Dynamic Field Settings

Figure 5.17: Dynamic Field Settings

Figure 5.17: Dynamic Field Settings

* The name of this resource. The value should be alphabetic and numeric characters only. The name will be displayed in the overview table.

* Label

:

This is the name to be shown on the screens where the field is active.

* Field order

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

This type has been selected in the left sidebar and can not be changed here anymore. This is a read-only field.

This type has been selected in the left sidebar and can not be changed here anymore. This is a read-only field.

The object type determines where the dynamic field can be used. For example a dynamic field with object type Ticket: can be used only in tickets, and can not be used in articles.

Figure 5.17: Dynamic Field Settings

Figure 5.17: Dynamic Field Settings

Default value: true false

Checkbox Field Settings

Default value:

This is the default value for this field.

Figure 5.18: Checkbox Field Settings

Name * (required)

Name (required)

Name (required)

Name (required)

Name (required)

Name * Name (required) Name (required) Name (required)

ValidID * ValidID (required) Validity (required)

Name (required) ValidID (required) Validity (required)

Name * ValidID (required) Validity (required)

Name (required)

Name (required)

Name * ValidID (required)

Name (required) Validity (required)

Name (required)

Name * (required)

Name (required)

Name (required)

Name (required) Validity (required) → Name (required)

1. Name (required)
2. Validity (required)
3. Name (required)

General

* Name:
Validity:

Must be unique and only accept alphabetic and numeric characters.
 Field type:

* Label:
Object type:

This is the name to be shown on the screens where the field is active.

* Field order:

This is the order in which this field will be shown on the screens where is active.

Contact with data Field Settings

* Name Field:

* ValidID Field:

Other Fields: * Key: * Value:

Add Field:

These are the possible data attributes for contacts.

Mandatory fields:

Comma separated list of mandatory keys (optional). Keys 'Name' and 'ValidID' are always mandatory and doesn't have to be listed here.

Sorted fields:

Comma separated list of keys in sort order (optional). Keys listed here come first, all remaining fields afterwards and sorted alphabetically.

Searchable fields:

Comma separated list of searchable keys (optional). Key 'Name' is always searchable and doesn't have to be listed here.

Translatable values:

If you activate this option the values will be translated to the user defined language.
Note: You need to add the translations manually into the language translation files.

5.19: 

Contact with data management

Home > Contact with data

Actions

Phone

•

Wildcards like "*" are allowed.

List (Phone)

NAME	VALID
Internal Helpdesk	valid
Network Operations	valid

5.20: Screenshot

4. Add contact with data

Add contact with data (Phone)

★ Name:

Phone:

★ Validity:

or

5.21: Screenshot

Procedure

1. Click on the "Add contact with data" button.
2. Fill in the fields.
3. Click on the "Save" button.

Edit contact with data (Phone)

★ Name:

Phone:

★ Validity:

or or

5.22: Screenshot

Procedure

1. Click on the "Edit contact with data" button.
2. Fill in the fields.
 - In the "Name" field

- ValidID 的 Validity
 - 的 Telephone 的 Telephone 的 Phone
3. 的 Name 的 ValidID
 4. 的 Name, Telephone, ValidID
 5. 的 Name 的
 6. 的 → 的
 7. 的 Ticket::Frontend::AgentTicketPhone###DynamicField 的 Ticket::Frontend::AgentTicketZoom###DynamicField 的
 8. 的
 9. 的
 10. 的
 11. 的 Frontend::Module###AdminDynamicFieldContactWithData 的
 12. If it's necessary to change the contact for this ticket, it can be done via any other ticket action where the dynamic field is configured for display.

Date Field Settings

Default date difference:
 The difference from NOW (in seconds) to calculate the field default value (e.g. 3600 or -60).

Define years period:
 Activate this feature to define a fixed range of years (in the future and in the past) to be displayed on the year part of the field.

Show link:
 Here you can specify an optional HTTP link for the field value in Overviews and Zoom screens.
 If special characters (&, @, :, /, etc.) should not be encoded, use 'uri' instead of 'url' filter.
 Example: http://some.example.com/handle?query=[% Data.Field1 | uri %]

Link for preview:
 If filled in, this URL will be used for a preview which is shown when this link is hovered in ticket zoom. Please note that for this to work, the regular URL field above needs to be filled in, too.

Restrict entering of dates:
 Here you can restrict the entering of dates of tickets.

5.23: 的

的 的 的 3600 -60

Configure the field's default value.

Configure the field's default value.

Configure the field's default value.

Configure the field's default value.

http://some.example.com/handle?query=[% Data.Field1 | uri %]

Configure the field's default value.

Configure the field's default value.

Configure the field's default value.

Configure the field's default value.

Configure the field's default value.

Configure the field's default value.

Date / Time Field Settings

Default date difference:
 The difference from NOW (in seconds) to calculate the field default value (e.g. 3600 or -60).

Define years period:
 Activate this feature to define a fixed range of years (in the future and in the past) to be displayed on the year part of the field.

Show link:
 Here you can specify an optional HTTP link for the field value in Overviews and Zoom screens.
 If special characters (&, @, :, /, etc.) should not be encoded, use 'uri' instead of 'uri' filter.
 Example: http://some.example.com/handle?query=[% Data.Field1 | uri %]

Link for preview:
 If filled in, this URL will be used for a preview which is shown when this link is hovered in ticket zoom. Please note that for this to work, the regular URL field above needs to be filled in, too.

Restrict entering of dates:
 Here you can restrict the entering of dates of tickets.

5.24: Date / Time Field Settings

Configure the field's default value.

Configure the field's default value.

Configure the field's default value.

Configure the field's default value.

Dropdown Field Settings

Possible values:

Add value:

Default value:

This is the default value for this field.

Add empty value:

Activate this option to create an empty selectable value.

Tree View:

Activate this option to display values as a tree.

Translatable values:

If you activate this option the values will be translated to the user defined language.
Note: You need to add the translations manually into the language translation files.

Show link:

Here you can specify an optional HTTP link for the field value in Overviews and Zoom screens.
 If special characters (&, @, :, /, etc.) should not be encoded, use 'uri' instead of 'uri' filter.
 Example: `http://some.example.com/handle?query=[% Data.Field1 | uri %]`

Link for preview:

If filled in, this URL will be used for a preview which is shown when this link is hovered in ticket zoom. Please note that for this to work, the regular URL field above needs to be filled in, too.

Figure 5.25: Dropdown Field Settings

Field description text lines

Field name: _____

Field type: HTTP URL

http://some.example.com/handle?query=[% Data.Field1 | uri %]

Field options: URL, URL, URL

Field label

Multiselect Field Settings

Possible values:

Add value:

Default value:

This is the default value for this field.

Add empty value:

Activate this option to create an empty selectable value.

Tree View:

Activate this option to display values as a tree.

Translatable values:

If you activate this option the values will be translated to the user defined language.
Note: You need to add the translations manually into the language translation files.

5.26: Field settings

Field description text lines

Field name: _____

Figure 5.27: Text Field Settings

Figure 5.27: Text Field Settings

Text Field Settings

Default value:

This is the default value for this field.

Show link:

Here you can specify an optional HTTP link for the field value in Overviews and Zoom screens.
If special characters (&, @, :, /, etc.) should not be encoded, use 'url' instead of 'uri' filter.
Example: `http://some.example.com/handle?query=[% Data.Field1 | uri %]`

Link for preview:

If filled in, this URL will be used for a preview which is shown when this link is hovered in ticket zoom. Please note that for this to work, the regular URL field above needs to be filled in, too.

Check RegEx: Here you can specify a regular expression to check the value. The regex will be executed with the modifiers `xms`.
Example: `^[0-9]$`

Add RegEx:

Figure 5.27: Text Field Settings

Figure 5.27: Text Field Settings

Figure 5.27: Text Field Settings

`http://some.example.com/handle?query=[% Data.Field1 | uri %]`

Figure 5.27: Text Field Settings

Figure 5.27: Text Field Settings

`^[0-9]$`

Figure 5.27: Text Field Settings

Figure 5.27: Text Field Settings

Figure 5.27: Text Field Settings

Figure 5.27: Text Field Settings

Figure 5.27: Text Field Settings

Figure 5.27: Text Field Settings

Figure 5.27: Text Field Settings

`^[0-9]$`

Figure 5.27: Text Field Settings

Textarea Field Settings

Number of rows:
 Specify the height (in lines) for this field in the edit mode.

Number of cols:
 Specify the width (in characters) for this field in the edit mode.

Default value:
 This is the default value for this field.

Check RegEx: Here you can specify a regular expression to check the value. The regex will be executed with the modifiers xms.
 Example: `^[0-9]$`

Add RegEx:

5.28: Textarea Field Settings

OTOBOTEXT

OTOBOTEXT: This dynamic field is already included in OTOBO 10 Standard! The documentation on the field types still needs to be completed.

WebOTOBOTEXT

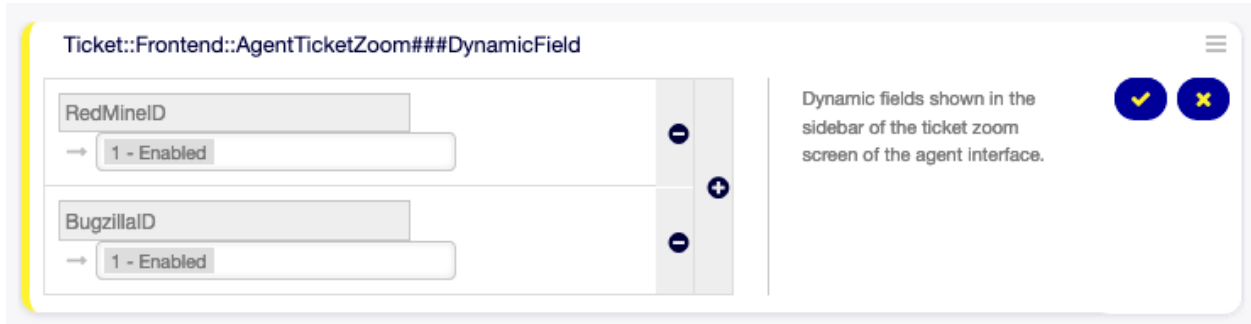
OTOBOTEXT: This dynamic field is already included in OTOBO 10 Standard! The documentation on the field types still needs to be completed.

5.2.3 OTOBOTEXT

OTOBOTEXT

1. OTOBOTEXT OTOBO OTOBO OTOBO
2. OTOBOTEXT OTOBO OTOBO
3. OTOBO OTOBO → OTOBO → OTOBOTEXT
4. OTOBO ### DynamicField OTOBOTEXT OTOBOTEXT OTOBO
5. OTOBO + OTOBOTEXT

6. `RedMineID`
7. `1 - Enabled`
8. `BugzillaID`
9. `1 - Enabled`



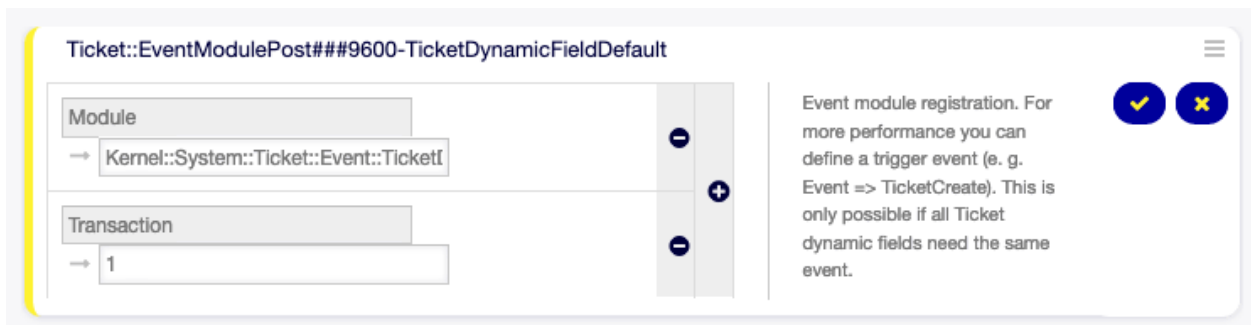
5.29: `DynamicField`

5.2: `DynamicField` 5-7

5.2.4 `EventModulePost`

`TicketCreate`

1. `Kernel::System::Ticket::Event::TicketI`
2. `Ticket::EventModulePost###9600-TicketDynamicFieldDefault`
3. `1`
4. `Transaction`
5. `1`

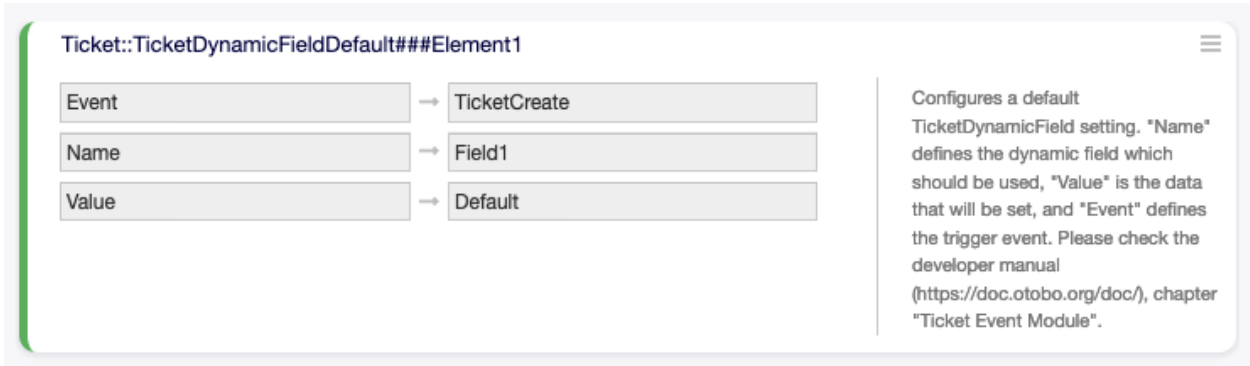


5.30: `EventModulePost`

`TicketCreate` (`Field1`)

1. `Kernel::System::Ticket::Event::TicketI`
2. `DynamicFieldDefault` `Ticket::TicketDynamicFieldDefault###Element1`
3. `1`

4. 16
5. 16



5.31: 16

16 Ticket::TicketDynamicFieldDefault###Element 16

:

If more than 16 fields needs to be set up, a custom XML file must be placed in \$OTOBO_HOME/Kernel/Config/Files/XML directory to extend this feature.

5.2.5 16

16

1. 16
2. 16 → 16 → 16 → 16 PreferencesGroups###DynamicField
3. 16 16
4. 16
5. 16

16 → 16

16 Name_X 16 16 XML

16 XML PreferencesGroups###DynamicField

- PreferencesGroups###101-DynamicField-Field1
- PreferencesGroups###102-DynamicField-Field2
- PreferencesGroups###My-Field1
- PreferencesGroups###My-Field2

PreferencesGroups###DynamicField

Active	→ 1	-
Block	→ Input	-
Data	→ [% Env('UserDynamicField_NameX')	-
Desc	→ This is a Description for DynamicFielc	-
Key	→ Default value for NameX	-
Label	→ NameX	-
Module	→ Kernel::Output::HTML::Preferences::C	-
PrefKey	→ UserDynamicField_NameX	-
PreferenceGroup	→ Miscellaneous	-
Prio	→ 7000	-

Defines the config parameters of this item, to be shown in the preferences view. Please note: setting 'Active' to 0 will only prevent agents from editing settings of this group in their personal preferences, but will still allow administrators to edit the settings of another user's behalf. Use 'PreferenceGroup' to control in which area these settings should be shown in the user interface.

5.32: Screenshot of the OTOBO administration interface for 'PreferencesGroups###DynamicField'.

NameX

Default value for

This is a Description for DynamicField on Framework.

5.33: Screenshot of the OTOBO administration interface for 'NameX'.

5.3 配置

Processing tickets requires often a workflow. Let's say "if-then" activities.

If 配置

- 配置
- 配置
- 配置
- 配置

配置

配置

OTOBO supports this with the Generic Agent. Here, simple or compound time and event-based tasks are configurable in the OTOBO front end without the requirement to learn a scripting language. Depending on search criteria, and time or event criteria, tickets will automatically be acted upon.

Use this screen to manage generic agent jobs in the system. A fresh OTOBO installation contains no generic agent jobs by default. The generic agent job management screen is available in the Generic Agent module of the Processes & Automation group.

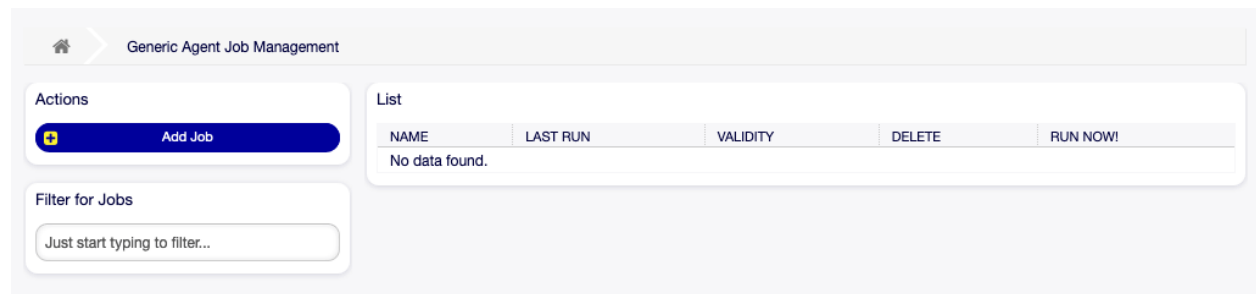


图 5.34: 配置

5.3.1 配置

配置

1. 配置 配置
2. 配置
3. 配置

配置

1. 配置
2. 配置
3. 配置

配置

1. 配置
2. 配置

Job Settings

* Job name:

Validity:

▶ Automatic Execution (Multiple Tickets)

▶ Event Based Execution (Single Ticket)

▶ Select Tickets

▶ Update/Add Ticket Attributes

▶ Add Note

▶ Execute Ticket Commands

▶ Execute Custom Module

Save Changes

Save
 or
 Save and finish
 or
 [Cancel](#)

5.36: 

List

NAME	LAST RUN	VALIDITY	DELETE	RUN NOW!
Test job		valid		Run this task

5.37: 

Figure 5.37: Job Settings - Validity

5.3.2 Job Settings

Figure 5.37: Job Settings - Validity

Figure 5.37

The screenshot shows a 'Job Settings' form. It contains two input fields: 'Job name' with a red asterisk indicating it is required, and 'Validity' with a dropdown menu currently set to 'Yes'.

Figure 5.38: Job Settings - Validity

Figure 5.38 * Job name is required. Validity is optional.

Set the validity of this resource. This resource can be used in OTOBO only, if this field is set to Yes. Setting this field to No will disable the use of the resource.

Figure 5.39

Figure 5.39: Automatic Execution (Multiple Tickets)

The screenshot shows the 'Automatic Execution (Multiple Tickets)' section. It features three input fields: 'SCHEDULE MINUTES', 'SCHEDULE HOURS', and 'SCHEDULE DAYS'. Below these fields is a note: 'Automatic execution values are in the system timezone.' A red warning message states: 'Currently this generic agent job will not run automatically. To enable automatic execution select at least one value from minutes, hours and days!'.

Figure 5.39: Automatic Execution (Multiple Tickets)

Example 1: SCHEDULE MINUTES: 10, SCHEDULE HOURS: 00:10, 01:10, 02:10

Example 2: SCHEDULE MINUTES: 10, SCHEDULE HOURS: 02, SCHEDULE DAYS: 02:10

Example 3: SCHEDULE MINUTES: 10, SCHEDULE HOURS: 02, SCHEDULE DAYS: Fri, SCHEDULE DAYS: 02:10

Figure 5.40

Figure 5.40: Automatic Execution (Multiple Tickets)

Example 4: SCHEDULE MINUTES: 10, SCHEDULE HOURS: 02, SCHEDULE DAYS: Fri, SCHEDULE DAYS: 02:10

Example 5: SCHEDULE MINUTES: 10, SCHEDULE HOURS: 02, SCHEDULE DAYS: Fri, SCHEDULE DAYS: 02:10

Figure 5.42

Figure 5.42: Execute Ticket Commands

Execute Ticket Commands

Send agent/customer notifications on

changes:

CMD:

(This command will be executed. ARG[0] will be the ticket number. ARG[1] the ticket id.)

Delete tickets:

Warning: All affected tickets will be removed from the database and cannot be restored!

Figure 5.42: Execute Ticket Commands

Send agent/customer notifications on Yes/No

CMD: ARG[0] ARG[1]ID

Warning: All affected tickets will be removed from the database and cannot be restored!

Delete tickets: Yes/No

Warning: All affected tickets will be removed from the database and cannot be restored!

Figure 5.43

Figure 5.43: Execute Custom Module

Execute Custom Module

Module:

Param 1 key: Param 1 value:

Param 2 key: Param 2 value:

Param 3 key: Param 3 value:

Param 4 key: Param 4 value:

Param 5 key: Param 5 value:

Param 6 key: Param 6 value:

Figure 5.43: Execute Custom Module

Figure 5.43: Execute Custom Module

Before import of a process, it is still necessary to create all `roles`, `groups` and `users`, as well as to set `permissions`, that are needed by each process before the import. If the process requires the use of `ACLs` those are also needed to be set manually.

Example: `roles`

5.4.2 Roles

Business Process Management (BPMN) ISO standard

Example: `roles`

Edit Activity "Example task activity"

[Cancel & close](#)

▼ Activity

* Activity Name:

▼ Activity Dialogs

You can assign Activity Dialogs to this Activity by dragging the elements with the mouse from the left list to the right list. Ordering the elements within the list is also possible by drag 'n' drop.

Filter available Activity Dialogs...

AVAILABLE ACTIVITY DIALOGS	
Recording the demand	A <input type="checkbox"/>
Order denied	A <input type="checkbox"/>
Shipment received	A <input type="checkbox"/>
Order placed	A <input type="checkbox"/>
Approved	A <input type="checkbox"/>
Approval denied	A <input type="checkbox"/>

[Create New Activity Dialog](#)

ASSIGNED ACTIVITY DIALOGS

Figure 5.45: Roles

Example: `roles`

Example: `roles`

Example: `roles`

- `roles`
- `roles`
- `roles`

Example: `roles`

Example: `roles`

Example: `roles`

- `roles`
- `roles`

Edit Activity "Example task activity"

Cancel & close

▼ Activity

★ Activity name:

★ Activity type:

▼ User Task Activity Dialogs

You can assign User Task Activity Dialogs to this Activity by dragging the elements with the mouse from the left list to the right list. Ordering the elements within the list is also possible by drag 'n' drop.

Filter available User Task Activity Dialogs...

AVAILABLE USER TASK ACTIVITY DIALOGS

Request filed	A	✎
Recording the Application for leave	A,E	✎
Approval	A	✎

Create New User Task Activity Dialog

ASSIGNED USER TASK ACTIVITY DIALOGS

5.47: [Screenshot]

- [Screenshot]
- [Screenshot]
- [Screenshot]

Activity Dialogs You can assign activity dialogs to this activity by dragging the elements with the mouse from the left list to the right list. Ordering the elements within the list is also possible by drag and drop.

Click on the Create New Activity Dialog button to create new dialogs.

5.4.3 [Screenshot]

Processes are more complex than other resources in OTOBO. To create a process, you need to do several steps. The following chapters show you, how to define a process from the specification and create the needed resources. Let's see an example to make it more demonstrative. We will define a book order process.

[Screenshot]

[Screenshot]

[Screenshot]

Title: Prozessmanagement für Dummies
 Autor: Thilo Knuppertz
 ISBN: 35210.03713

[Screenshot]

[Screenshot]

[Screenshot]

Activity Dialog

Activity Dialogs are used to record data, let's call this activity dialog.

Activity Dialogs can react to changed data automatically, let's call this transition.

- Possibility to record data, let's call this activity dialog.
- Check which can react to changed data automatically, let's call this transition.
- Change which can be applied to a process ticket after successful transitions of a process ticket, let's call this transition action.
- A possibility to offer more than just one activity dialog to be available. In our example this is needed when the manager must have the choice between Approve and Deny. Let's call this activity.

Now, with activities, activity dialogs, transitions and transition actions we have the necessary tools to model the individual steps of our example. What is still missing is an area where for each workflow the order of the steps can be specified. Let's call this process.

Process

Processes are used to specify the order of the steps in a workflow.

Processes can be defined in the following way:

- Activity
- Activity Dialog
- Transition
- Transition Action

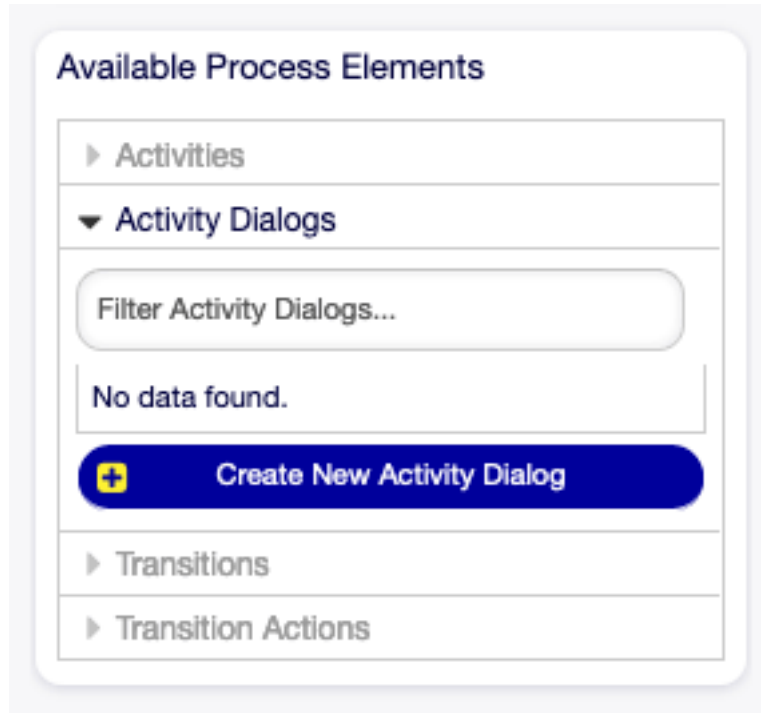
Processes can be defined in the following way:

- Activity
- Activity Dialog

Processes can be defined in the following way:

Activity	Activity Dialog	Transition	Transition Action	Process
Activity	Activity Dialog	Title	Activity	
Activity	Activity Dialog	Author	Activity	
Activity	Activity Dialog	ISBN	ISBN	
Activity	Activity Dialog	Status	Activity	<ul style="list-style-type: none"> • Activity • Activity Dialog • Activity Dialog • Activity Dialog • Activity Dialog • Activity Dialog
Activity	Activity Dialog	Supplier	Activity	
Activity	Activity Dialog	Price	Activity	
Activity	Activity Dialog	DeliveryDate	Activity	
Activity	Activity Dialog	DateOfReceipt	Activity	

Processes can be defined in the following way:



5.49: Book Ordering - Activity Dialogs

Assigning fields to the activity dialog is a simple process.

To assign fields to the activity dialog simply drag the required field from the Available Fields pool and drop into the Assigned Fields pool. The order in the Assigned Fields pool is the order as the fields will have in the screen. To modify the order simply drag and drop the field within the pool to rearrange it in the correct place.

Fields available:

- Article
- DynamicField_Title
- DynamicField_Author
- DynamicField_ISBN
- DynamicField_Status

Fields assigned:

DynamicField_ Title

As soon as the fields are dropped into the Assigned Fields pool another popup screen is shown with some details about the field. We will leave the default options and only for Article fields we should make sure that the Communication Channel field is set to OTOBO and that the Is visible for customer is not checked.

After all fields are filled in, click on the Save and finish button to save the changes and go back to the process management screen.

Create the following activity dialogs with fields:

-

Create New Activity Dialog

[Cancel & close](#)

Please note that customer users will not be able to see or use the following fields: Owner, Responsible, Lock, PendingTime and CustomerID. The Queue field can only be used by customers when creating a new ticket.

▼ Activity Dialog

★ Activity dialog Name:

Available in:

★ Description (short):

Description (long):

Permission:

Required Lock:

Submit Advice Text:

Submit Button Text:

5.50: Book Ordering - Add Activity Dialog

▼ Fields

You can assign Fields to this Activity Dialog by dragging the elements with the mouse from the left list to the right list. Ordering the elements within the list is also possible by drag 'n' drop.

Filter available fields...

AVAILABLE FIELDS	ASSIGNED FIELDS
CustomerID	Article <input type="checkbox"/>
DynamicField_DateOfReceipt	DynamicField_Title <input type="checkbox"/>
DynamicField_DeliveryDate	DynamicField_Author <input type="checkbox"/>
DynamicField_Price	DynamicField_ISBN <input type="checkbox"/>
DynamicField_Supplier	DynamicField_Status <input type="checkbox"/>
Lock	
Owner	
PendingTime	
Priority	
Queue	
Responsible	
SLA	
Service	

5.51: Book Ordering - Add Activity Dialog Fields

Edit Field Details: Article ✕

Description (short):

Description (long):

Default value:

Communication Channel:

Is visible for customer:

Time units:

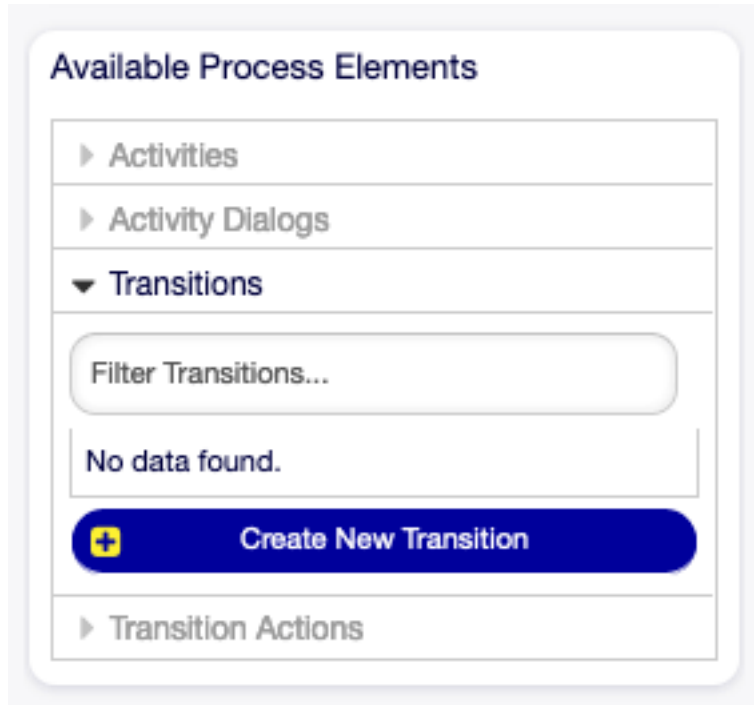
Display:

5.52: Book Ordering - Edit Activity Dialog Fields

- Article
- DynamicField_Title DynamicField_Author DynamicField_ISBN
- DynamicField_Status
-
- Article
- DynamicField_Status
-
- DynamicField_Status
-
- Article
- DynamicField_Status
-
- DynamicField_Supplier DynamicField_Price DynamicField_DeliveryDate
- DynamicField_Status
-
- DynamicField_DateOfReceipt
- DynamicField_Status

Create Transitions

Click on the Transitions item in the Available Process Elements widget in the left sidebar. This action will expand the Transitions options and will collapse all others doing an accordion like effect. Click on the Create New Transition button.



5.53: Book Ordering - Transitions

In the opened popup screen fill in the Transition Name. For this example in the Condition Expressions we will use just one condition expression and just one field. For both we can leave the Type of Linking as and and we will use the filed match type value as String.

After all fields are filled in, click on the Save and finish button to save the changes and go back to the process management screen.

Create the following transitions:

- `DynamicField_Status` `DynamicField_Status`
- `DynamicField_Status` `DynamicField_Status`
- `DynamicField_Status` `DynamicField_Status`
- `DynamicField_Status` `DynamicField_Status`
- `DynamicField_Status` `DynamicField_Status`

5.54: Book Ordering - Add Transition

- DynamicField_Status

Create Transition Actions

Click on the Transition Actions item in the Available Process Elements widget in the left sidebar. This action will expand the Transition Actions options and will collapse all others doing an accordion like effect. Click on the Create New Transition Action button.

In the opened popup screen fill in the Transition Action Name and the Transition Action module then click on the Save button. A new Configure button will appear next to the module field.

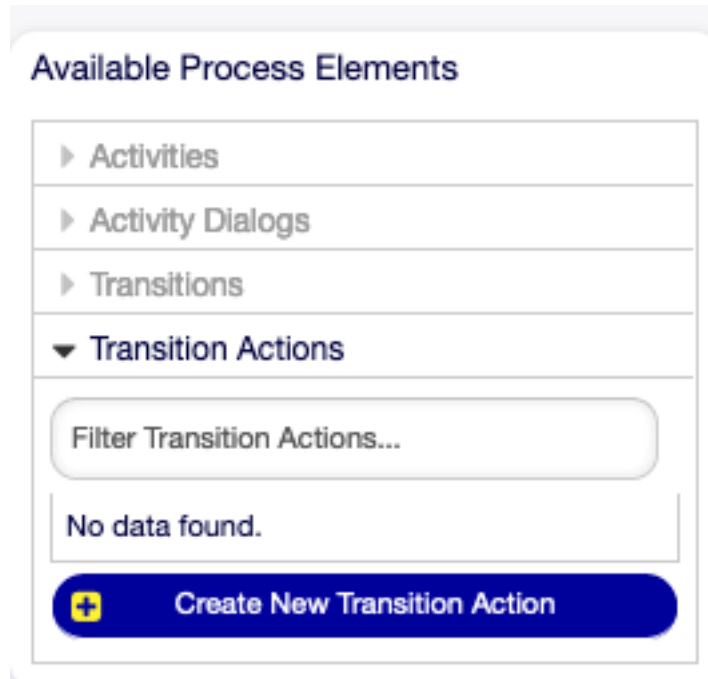
*XXXXXXXXXXXXXXXXXXXXXXXXXXXX

After all fields are filled in, click on the Save and finish button to save the changes and go back to the process management screen.

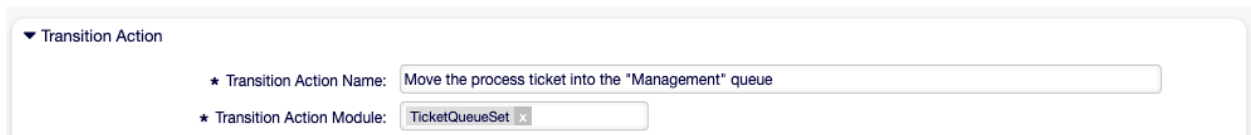
:

Each module has its own and different parameters. As soon as you add a TransitionAction, the options are displayed directly. Further information can currently only be found in the source code:

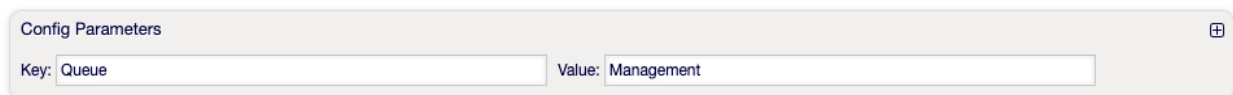
- DynamicFieldSet
- TicketArticleCreate
- TicketCreate
- TicketCustomerSet
- TicketLockSet
- TicketOwnerSet
- TicketQueueSet
- TicketResponsibleSet



5.55: Book Ordering - Transition Actions



5.56: Book Ordering - Add Transition Action



5.57: Book Ordering - Transition Action Parameters

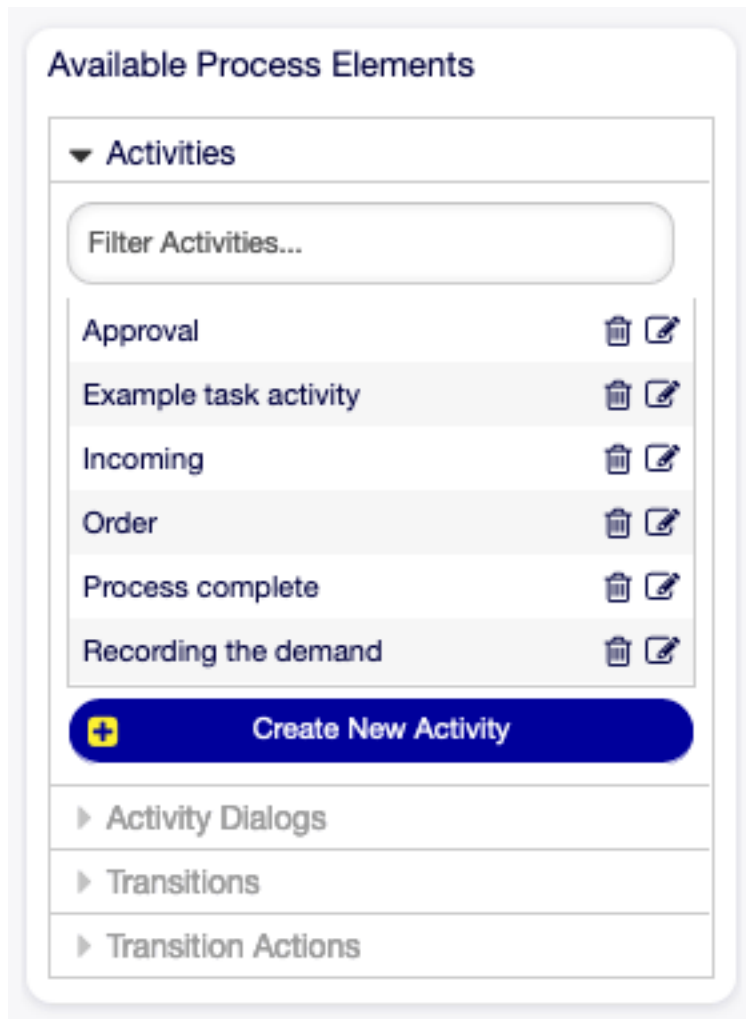
- TicketServiceSet
- TicketSLASet
- TicketStateSet
- TicketTitleSet
- TicketTypeSet

All transition action modules are located in the legacy named `Kernel/System/ProcessManagement/TransitionAction`.

Create the following transition actions:

- `ManagementApproval` ()
 To be executed when the transition Approval applied.
- `ManagerApproval`
 To be executed when the transition Approval applied.
- `Employees`
 - The transition Approval denied applied.
 - The transition Order denied applied.
 - The transition Shipment received applied.
- `Employee`
 - The transition Approval denied applied.
 - The transition Order denied applied.
 - The transition Shipment received applied.
- `Purchasing`
 To be executed when the transition Approved applied.
- `Post office`
 To be executed when the transition Order placed applied.
- To be executed when the transition Shipment received applied.
- - The transition Approval denied applied.
 - The transition Order denied applied.

There are places where the same transition actions should be executed. Therefore it is reasonable to make it possible to link transition actions freely with transitions to be able to reuse them.



5.58: 10.1 - 10.1



Recording the demand activity dialog is assigned to the activity. The order in the Assigned Activity Dialogs pool is the order as the dialogs will be presented in the Ticket Zoom screen. To modify the order simply drag and drop the dialog within the pool to rearrange it in the correct place.

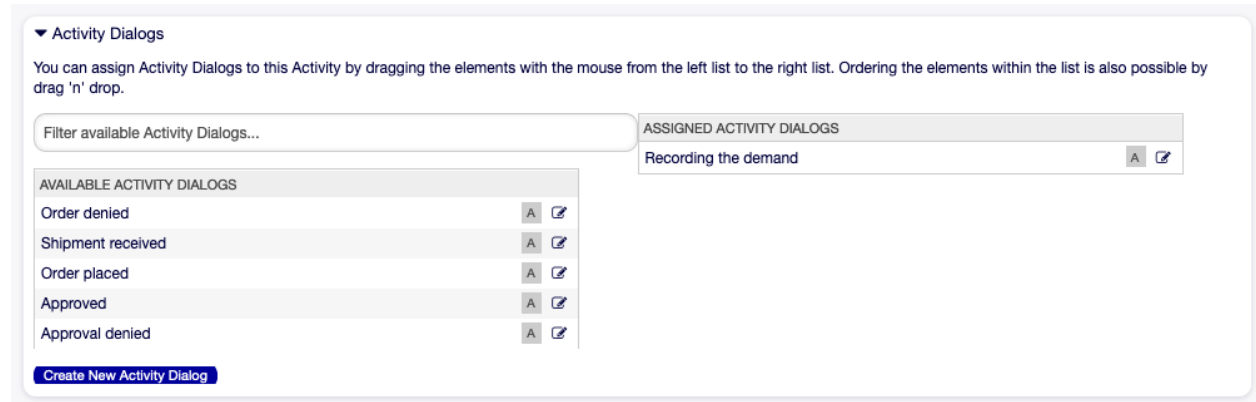


5.59: Recording the demand - Activity Name

To assign dialogs to the activity simple drag the required dialogs from the Available Activity Dialogs pool and drop into the Assigned Activity Dialogs pool. The order in the Assigned Activity Dialogs pool is the order as the dialogs will be presented in the Ticket Zoom screen. To modify the order simply drag and drop the dialog within the pool to rearrange it in the correct place.

This order is specially important in the first activity, since the first activity dialog for this activity is the only one that is presented when the process starts.

In this example we need to assign only the Recording the demand activity dialog. Drag this dialog from the Available Activity Dialogs pool and drop into the Assigned Activity Dialogs pool.



5.60: Book Ordering - Assign Activity Dialog

After all fields are filled in, click on the Save and finish button to save the changes and go back to the process management screen.



- Assign the activity dialog Recording the demand.
- Assign the activity dialogs Approval denied and Approved.
- Assign the activity dialogs Order denied and Order placed.
-

Assign the activity dialog Shipment received.

-

This is an activity without possible activity dialogs. It will be set after Approval denied, Order denied or Shipment received and represents the end of the process.

Now we can clearly see that activities are precisely defined states of a process ticket. After a successful transition a process ticket moves from one activity to another.

Conclusion

Let us conclude our example with the last missing piece in the puzzle, the process as a flow describer. In our case this is the whole ordering workflow. Other processes could be office supply ordering or completely different processes.

The process has a starting point which consists of the start activity and the start activity dialog. For any new book order, the first activity dialog of the first activity is the first screen that is displayed. If this is completed and saved, the process ticket will be created and can follow the configured workflow.

The process also contains the directions for how the process ticket can move through the process. Let's call this **process path**. It consists of the start activity, one or more transitions (possibly with transition actions) and other activities.

Assuming that the activities have already assigned their activity dialogs, drag an activity from the accordion in the Available Process Elements widget in the left sidebar and drop it into the canvas area below the process information. Notice that an arrow from the process start (white circle) to the activity is placed automatically. This is the first activity and its first activity dialog is the first screen that will be shown when the process starts.



Then let's create the process path (connection) between this two activities. For this we will use the transitions. Click on transition in the accordion, drag a transition and drop it inside the first activity. As soon as the transition is dropped the end point of the transition arrow will be placed next to the process start point. Drag the transition arrow end point and drop it inside the other activity to create the connection between the activities.

Now that the process path between the actions is defined, then we need to assign the transition actions to the transition. Double click the transition label in the canvas to open a new popup window.

After the transition actions are assigned, click on the Save button to go back to the main process edit screen. Click on Save button below the canvas to save all other changes.

Complete the process path by adding the following activities, transitions and transition actions:

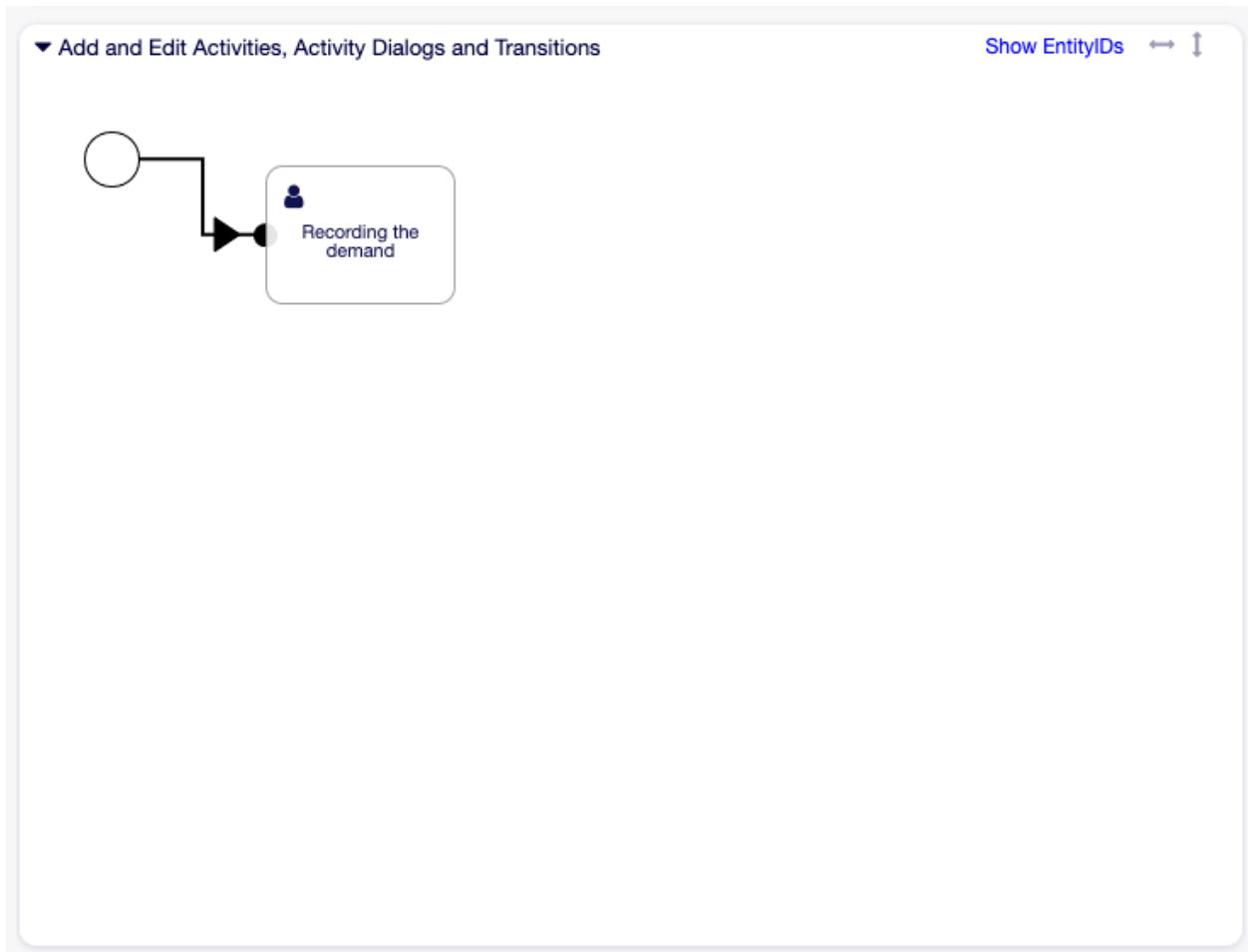
-

Possible transition: Approval

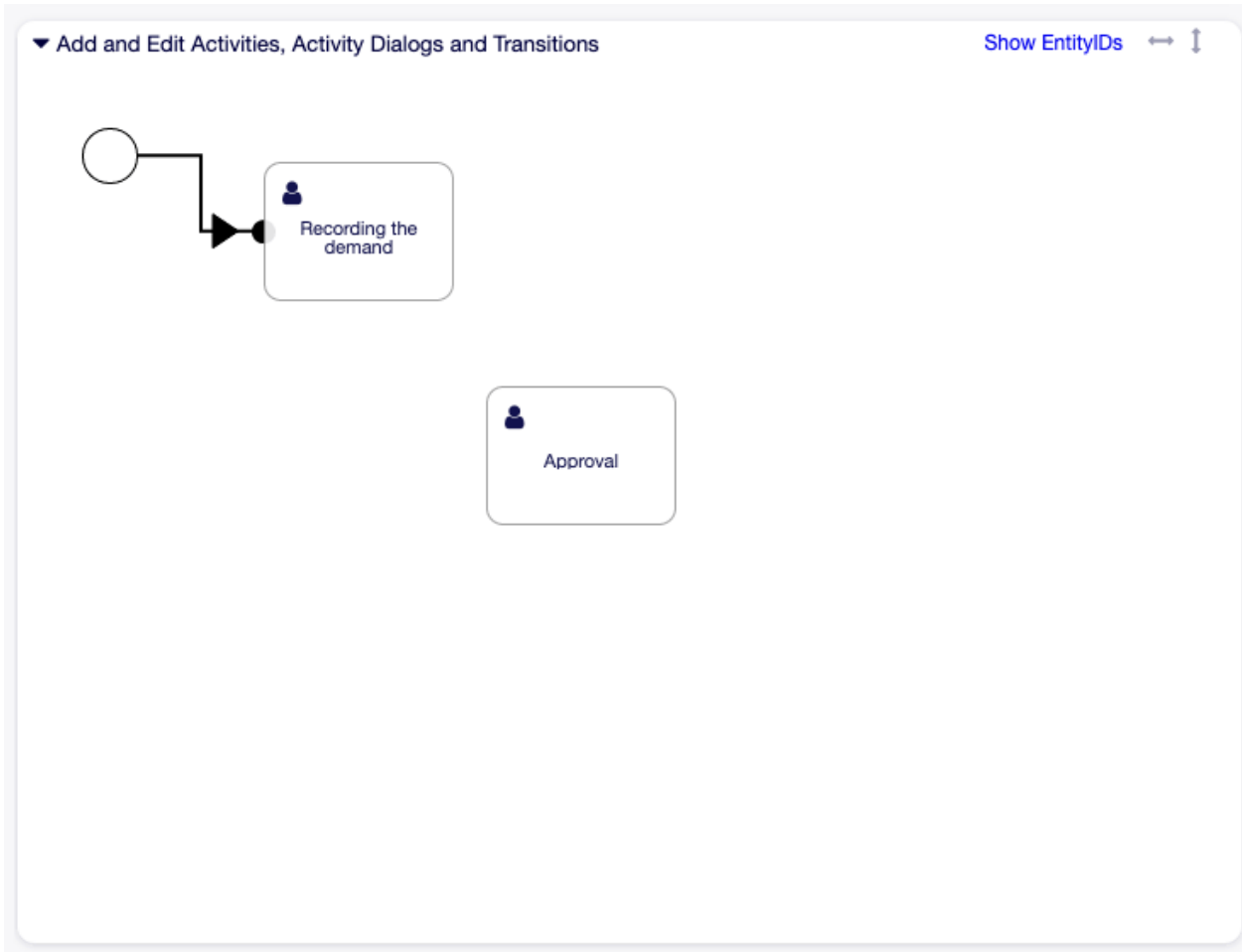


Additionally, the following transition actions are executed:

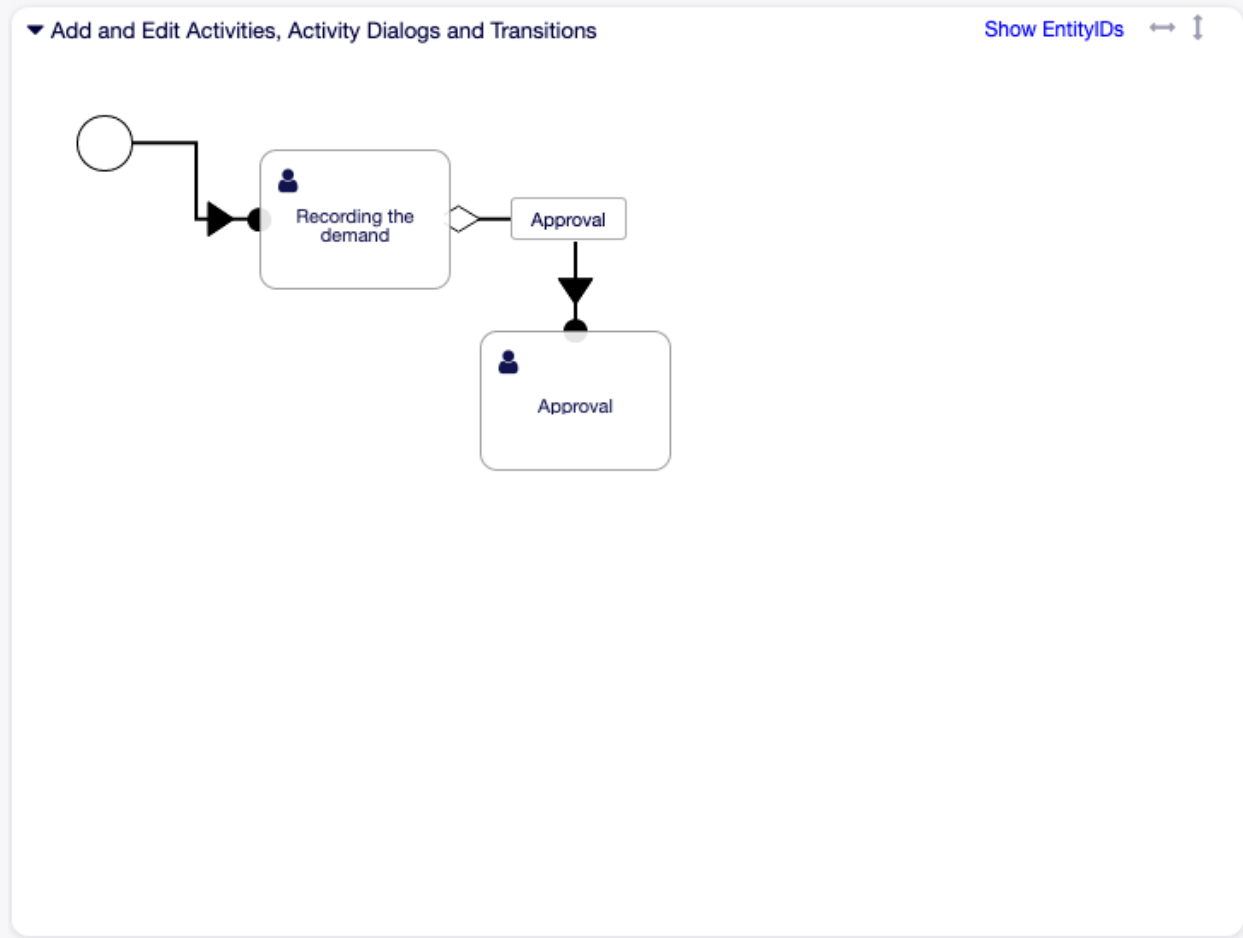
- "Management
- "Manager



5.61: Diagram - Recording the demand



5.62: Diagram - Recording the demand



5.63: Book Ordering - First Transition On Canvas

Edit Path
[Cancel & close](#)

▼ Path

▼ Transition Actions

You can assign Transition Actions to this Transition by dragging the elements with the mouse from the left list to the right list. Ordering the elements within the list is also possible by drag 'n' drop.

Filter available Transition Actions...

AVAILABLE TRANSITION ACTIONS	ASSIGNED TRANSITION ACTIONS
Move process ticket into the "Employees" queue (TransitionAction... ✎)	Change ticket responsible to "Manager" (TransitionAction-07fdcf5... ✎)
	Move the process ticket into the "Management" queue (Transition... ✎)

[Create New Transition Action](#)

5.64: Book Ordering - Assign First Transition Action

The activity Recording the demand is a defined step of the process ticket, where there is the possibility for the transition Approval. If this applies, the ticket will move to the next activity Approval, and the transition actions Move the process ticket into the “Management” queue and Change ticket responsible to “Manager” are executed. In the activity Approval, the activity dialogs Approval denied and Approved are available.

- 10.1

Possible transition: Approval denied

10.1.1

10.1.1.1

10.1.1.1.1 10.1.1.1.1

Additionally, the following transition actions are executed:

- 10.1.1.1.1 “Employees10.1.1.1.1” 10.1.1.1.1
- 10.1.1.1.1.1 “Employee10.1.1.1.1”
- 10.1.1.1.1

Possible transition: Approved

10.1.1.1.1

10.1.1.1.1

10.1.1.1.1.1 10.1.1.1.1.1

Additionally, the following transition actions are executed:

- 10.1.1.1.1.1 “Purchasing10.1.1.1.1.1” 10.1.1.1.1.1

We can see that from the current activity, which defines a step of the process ticket, there are one or more possibilities for transition which have exactly one target activity (and possibly one or more transition actions).

- 10.1

Possible transition: Order denied

10.1.1

10.1.1.1

10.1.1.1.1 10.1.1.1.1

Additionally, the following transition actions are executed:

- 10.1.1.1.1 “Employees10.1.1.1.1” 10.1.1.1.1
- 10.1.1.1.1.1 “Employee10.1.1.1.1.1”
- 10.1.1.1.1

Possible transition: Order placed

10.1.1.1.1

10.1.1.1.1

10.1.1.1.1.1 10.1.1.1.1.1

Additionally, the following transition actions are executed:

- 10.1.1.1.1.1 “Post office10.1.1.1.1.1” 10.1.1.1.1.1

- [icon]

Possible transition: Shipment received

[icon]

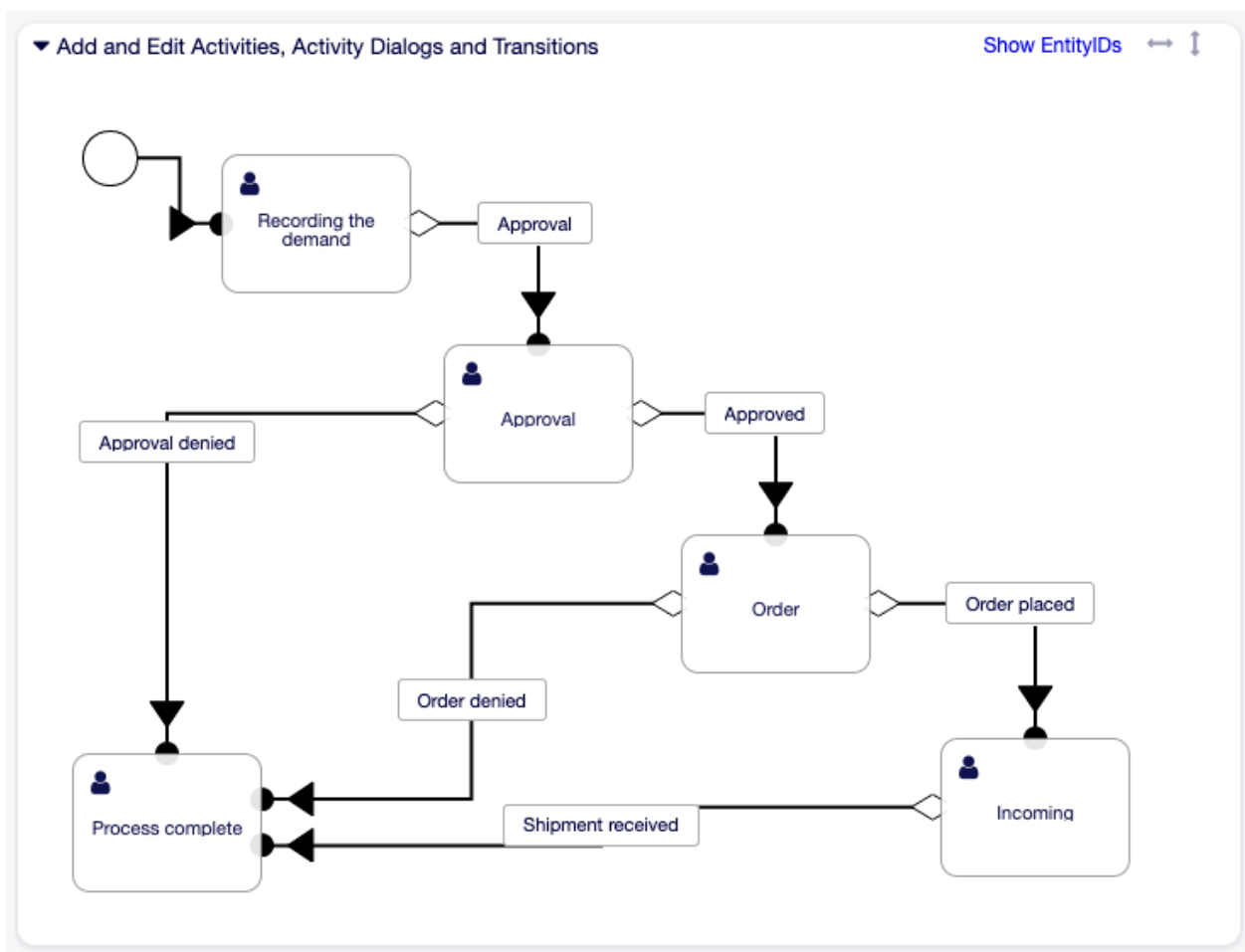
[icon]

[icon]

Additionally, the following transition actions are executed:

- [icon] "Employees[icon]" [icon]
- [icon] "Employee[icon]"
- [icon]

[icon]



5.65: [icon] - [icon]

[icon]

[icon]Perl[icon]

[icon]

5.5 Web

Requirements

- CRM
- ERP
- HR
- CRM

Overview

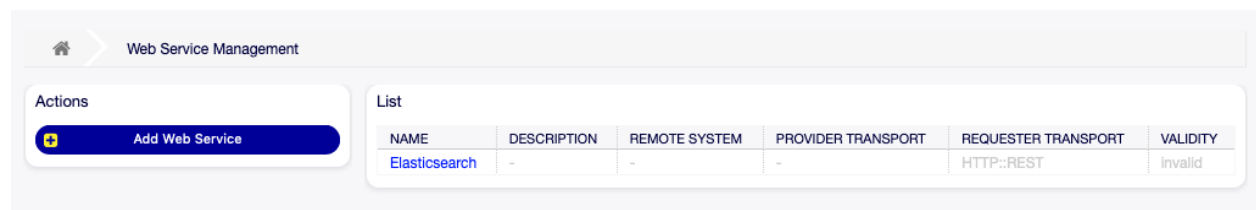
OTOBO supports this requirement by the Generic Interface. It empowers the administrator to create a web service for a specific task without scripting language knowledge. OTOBO reacts on incoming REST or SOAP requests and creates objects or provides object data to other systems transparently.

A web service is a communication method between two systems, in our case OTOBO and a remote system. In its configuration, the `operation` or `invoker` determine the direction of communication, and the `mapping` and `transport` take care of how the data is received and interpreted.

By configuration, you can define what actions the web service can perform internally (operation), what actions the OTOBO request can perform on a remote system (invokers), how data is converted from one system to the other (mapping), and which protocol is used for communication (transport).

The generic interface is the framework which makes it possible to create web services for OTOBO in a predefined way, using ready-made building blocks that are independent from each other and interchangeable.

Use this screen to manage web services in the system. A fresh OTOBO installation contains no web service by default. The web service management screen is available in the Web Services module of the Processes & Automation group.



5.66: Web

5.5.1 Web

Web

1. Web
2. Fill-in the required fields.
3. Web

Web

1. Web
2. Web
3. Web

General

★ Name: Debug threshold:

Description: Validity:

Remote system:

▶ OTOBO as provider

▶ OTOBO as requester

Save

or

5.67: Web

General

★ Name: Debug threshold:

Description: Validity:

Remote system:

▶ OTOBO as provider

▶ OTOBO as requester

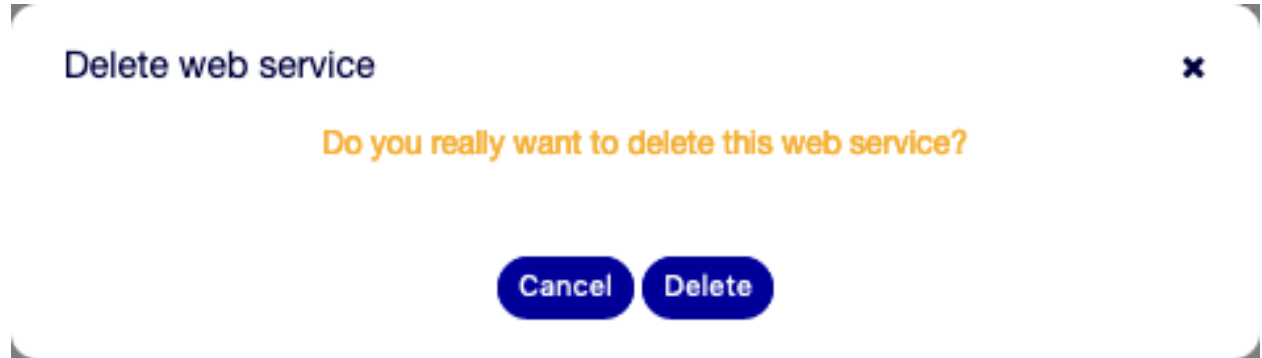
Save

or or

5.68: Web

Web Service

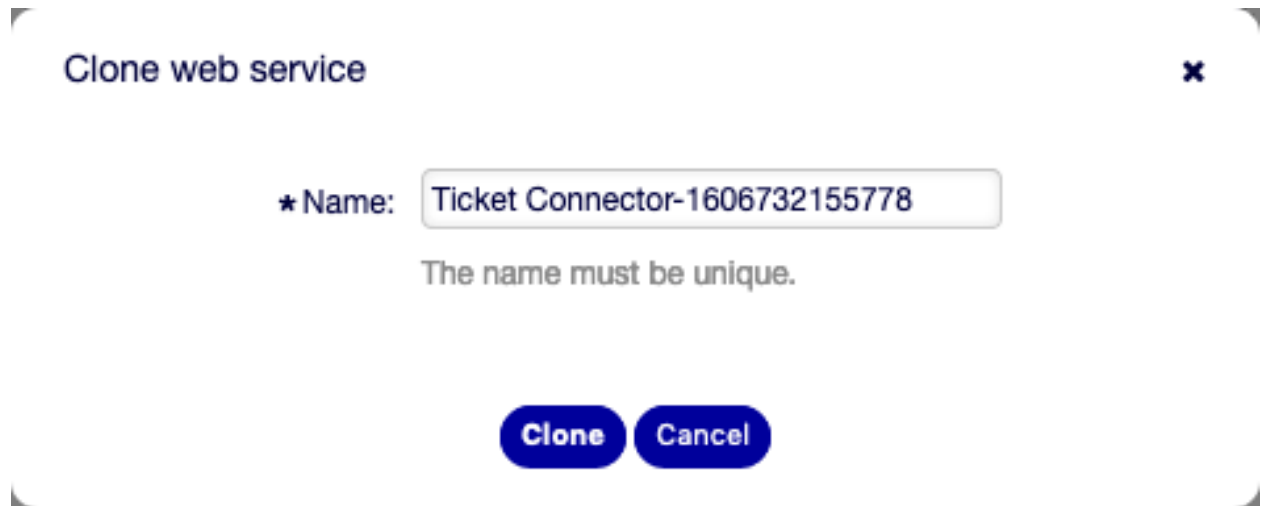
1. Web Service Web Service
2. Web Service Web Service
3. Web Service Web Service



5.69: Web Service

Web Service

1. Web Service Web Service
2. Web Service Web Service
3. Web Service Web Service



5.70: Web Service

Web Service

1. Web Service Web Service
2. Web Service Web Service
3. Choose a location in your computer to save the Export_ACL.yml file to.

Web

Web

1. Web Web
2. Web

Configuration History List

VERSION	CREATE TIME
1	2020-11-30 10:24:23

Select a single configuration version to see its details.

5.71: Web

Web

1. Web Web
2. Web

Request List

TYPE	TIME	COMMUNICATION ID	REMOTE IP
No data found.			

Select a single request to see its details.

Filter by type:

Filter from: / /

Filter to: / /

Filter by remote IP:

Limit:

Order:

Refresh

5.72: Web

Web

1. Web
2. Web
3. ...
4. .yaml
5. Web
6. Web

▼ OTOBO as provider

In provider mode, OTOBO offers web services which are used by remote systems.

Settings

Network transport:

Error Handling Modules

Error handling modules are used to react in case of errors during the communication. Those modules are executed in a specific order, which can be changed by drag and drop.

#	NAME	DESCRIPTION	BACKEND
1	No data found.		

Operations

Operations are individual system functions which remote systems can request.

NAME	DESCRIPTION	CONTROLLER	INBOUND MAPPING	OUTBOUND MAPPING
No data found.				

5.74: Web Service Settings - OTOBO as Provider

This option is visible only after a network transport was selected and saved. Selecting an operation will open a new screen for configuration.

OTOBO as Provider - HTTP::REST

To use the OTOBO REST interface, choose the network transport method “HTTP::REST”. Save and reload the screen to load the ticket operations.

Web Service Settings - OTOBO as Provider - HTTP::REST

You should now be able to select an operation.

Operations

There are different Ticket Operations which all serve a specific job:

- Ticket::TicketCreate
- Ticket::TicketGet
- Ticket::TicketSearch
- Ticket::TicketUpdate
- Ticket::TicketHistoryGet

In this example, we are going to use the Ticket::TicketCreate operation. Click on “Add Operation” and choose the “Ticket::TicketCreate” operation. Choose a descriptive name, save the operation and go back to the webservice overview.

You now should see a new entry “Route mapping for Operation ‘TicketCreate’”. Enter for example “/TicketCreate”

Operation Details

★ Name:
 The name is typically used to call up this web service operation from a remote system.

Description:

Operation backend:
 This OTOBO operation backend module will be called internally to process the request, generating data for the response.

Mapping for incoming request data:
 The request data will be processed by this mapping, to transform it to the kind of data OTOBO expects.

Mapping for outgoing response data:
 The response data will be processed by this mapping, to transform it to the kind of data the remote system expects.

Save or Cancel

5.75: Web Service Settings - OTOBO as Provider - Operation

This will define the route, which will translate to: `https://YOURSERVER/otobo/nph-genericinterface.pl/Webservice/<WEBSERVICE_NAME>/TicketCreate`

Click “Save and finish”.

Now you can send a request to the endpoint.

Here is an example using curl:

```
curl -X POST --header "Content-Type: application/json"
--data '{
  "UserLogin": "AgentUser",
  "Password": "Password",
  "Ticket": {
    "Title": "created by Webservice request",
    "QueueID": 5,
    "CustomerUser": "CustomerUser",
    "State": "new",
    "PriorityID": 1
  },
  "Article": {
    "CommunicationChannel": "Email",
    "From": "test@test.de",
    "Subject": "Webservice Create Example",
    "Body": "This was created by a Webservice request!",
    "ContentType": "text/html charset=utf-8"
  }
}'
https://YOURSERVER/otobo/nph-genericinterface.pl/Webservice/<WEBSERVICE_NAME>
↵/TicketCreate
```

This request is using the least amount of attributes needed to create a new Ticket.

A full list of all attributes needed for operations can be found here:

- TicketCreate: https://github.com/RotherOSS/otobo/blob/rel-10_1/Kernel/GenericInterface/Operation/Ticket/TicketCreate.pm#L70
- TicketGet: https://github.com/RotherOSS/otobo/blob/rel-10_1/Kernel/GenericInterface/Operation/Ticket/TicketGet.pm#L70
- TicketUpdate: https://github.com/RotherOSS/otobo/blob/rel-10_1/Kernel/GenericInterface/Operation/Ticket/TicketUpdate.pm#L70
- TicketSearch: https://github.com/RotherOSS/otobo/blob/rel-10_1/Kernel/GenericInterface/Operation/Ticket/TicketSearch.pm#L70
- TicketHistoryGet: https://github.com/RotherOSS/otobo/blob/rel-10_1/Kernel/GenericInterface/Operation/Ticket/TicketHistoryGet.pm#L70

XLST-Mapping for OTOBO as Provider - HTTP::REST

The XLST standard can be used to transform XML, JSON and CSV data.

In this example, we are going to use the XLST mapping to transform the response from the webservice into Dynamic Fields.

Create a Dynamic Field of Type Ticket->Text and name it for example "RemoteTicketID".

Given the incoming data: { "incidentID" : "12345", "incidentTitle" : "Test Ticket" }

We can save the data in the Dynamic Field as follows: <example code here>

OTOBO as Provider - HTTP::SOAP

Web

Web HTTP::REST HTTP::SOAP

: After selecting the transport method, you have to save the configuration by clicking the Save button. A Configuration button will be displayed next to this field.

The Configuration button is visible only after a network transport was selected and saved. See the configuration for OTOBO as Requester - HTTP::REST and OTOBO as Requester - HTTP::SOAP below.

This option is visible only after a network transport was selected and saved. Selecting an operation will open a new screen for its configuration.

OTOBO as Requester - HTTP::REST

OTOBO as Requester - HTTP::SOAP

Network Transport

Properties

Type: HTTP::SOAP

* Set SOAPAction:

Set to "Yes" in order to check the received SOAPAction header (if not empty).
Set to "No" in order to ignore the received SOAPAction header.

* SOAPAction scheme:

Select how SOAPAction should be constructed.
Some web services send a specific construction.

* SOAPAction separator:

Character to use as separator between name space and SOAP operation.
Usually .Net web services use "/" as separator.

* Namespace:

URI to give SOAP methods a context, reducing ambiguities.
e.g urn:otobo-com:soap:functions or http://www.otobo.de/GenericInterface/actions

* Request name scheme:

Select how SOAP request function wrapper should be constructed.
'FunctionName' is used as example for actual invoker/operation name.
'FreeText' is used as example for actual configured value.

* Response name scheme:

Select how SOAP response function wrapper should be constructed.
'FunctionName' is used as example for actual invoker/operation name.
'FreeText' is used as example for actual configured value.

Additional response headers:

* Maximum message length:

Here you can specify the maximum size (in bytes) of SOAP messages that OTOBO will process.

Sort options:

Outbound sort order for xml fields (structure starting below function name wrapper) - see documentation for SOAP transport.

or or

5.76: Web Service Settings - OTOBO as Provider - HTTP::SOAP

▼ OTOBO as requester

In requester mode, OTOBO uses web services of remote systems.

Settings

Network transport:

Error Handling Modules

Error handling modules are used to react in case of errors during the communication. Those modules are executed in a specific order, which can be changed by drag and drop.

#	NAME	DESCRIPTION	BACKEND
1	No data found.		

Invokers

Invokers prepare data for a request to a remote web service, and process its response data.

NAME	DESCRIPTION	CONTROLLER	INBOUND MAPPING	OUTBOUND MAPPING
No data found.				

5.77: Web Service Settings - OTOBO as Requester

▼ General options

* Name:

The name can be used to distinguish different error handling configurations.

Description:

Error handling module backend: **RequestRetry**

This OTOBO error handling backend module will be called internally to process the error handling mechanism.

▼ Processing options

Configure filters to control error handling module execution.

Only requests matching all configured filters (if any) will trigger module execution.

Invoker filter:

Only execute error handling module for selected invokers.

Error message content filter:

Enter a regular expression to restrict which error messages should cause error handling module execution.

Error message subject and data (as seen in the debugger error entry) will be considered for a match.

Example: Enter '^.*401 Unauthorized.*\$' to handle only authentication related errors.

Error stage filter:

Only execute error handling module on errors that occur during specific processing stages.

Example: Handle only errors where mapping for outgoing data could not be applied.

Error code:

An error identifier for this error handling module.

This identifier will be available in XSLT-Mapping and shown in debugger output.

Error message:

An error explanation for this error handling module.

This message will be available in XSLT-Mapping and shown in debugger output.

Stop after match:

Define if processing should be stopped after module was executed, skipping all remaining modules or only those of the same backend.

Default behavior is to resume, processing the next module.

▼ Request retry options

Retry options are applied when requests cause error handling module execution (based on processing options).

* Schedule retry:

Should requests causing an error be triggered again at a later time?

Submit

Save or Cancel

Network Transport

Properties

Type: HTTP::REST

★ Endpoint:

URI to indicate specific location for accessing a web service.
e.g https://www.otobo.de:10745/api/v1.0 (without trailing backslash)

★ Timeout:

Timeout value for requests.

Authentication:

An optional authentication mechanism to access the remote system.

★ Use Proxy Options:

Show or hide Proxy options to connect to the remote system.

★ Use SSL Options:

Show or hide SSL options to connect to the remote system.

Default command:

The default HTTP command to use for the requests.

or
 or
 [Cancel](#)

5.79: Web Service Settings - OTOBO as Requester - HTTP::REST

Network Transport

Properties

Type: HTTP::SOAP

★ Endpoint:

URI to indicate specific location for accessing a web service.
e.g. https://local.otobo.de:8000/Webservice/Example

★ Timeout:

Timeout value for requests.

★ Set SOAPAction:

Set to "Yes" in order to send a filled SOAPAction header.
Set to "No" in order to send an empty SOAPAction header.

★ SOAPAction scheme:

Select how SOAPAction should be constructed.
Some web services require a specific construction.

★ SOAPAction separator:

Character to use as separator between name space and SOAP operation.
Usually .Net web services use "/" as separator.

★ Namespace:

URI to give SOAP methods a context, reducing ambiguities.
e.g urn:otobo-com:soap:functions or http://www.otobo.de/GenericInterface/actions

★ Request name scheme:

Select how SOAP request function wrapper should be constructed.
'FunctionName' is used as example for actual invoker/operation name.
'FreeText' is used as example for actual configured value.

★ Response name scheme:

Select how SOAP response function wrapper should be constructed.
'FunctionName' is used as example for actual invoker/operation name.
'FreeText' is used as example for actual configured value.

Encoding:

The character encoding for the SOAP message contents.
e.g utf-8, latin1, iso-8859-1, cp1250, Etc.

Authentication:

An optional authentication mechanism to access the remote system.

★ Use Proxy Options:

Show or hide Proxy options to connect to the remote system.

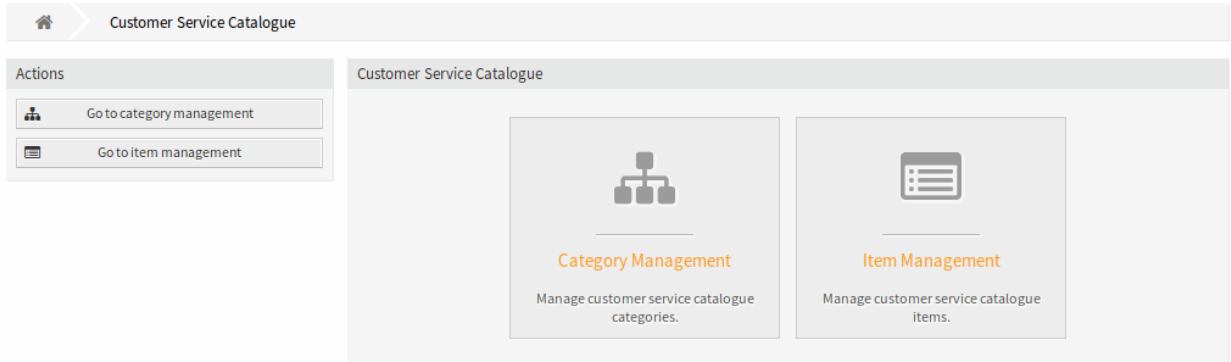
★ Use SSL Options:

Show or hide SSL options to connect to the remote system.

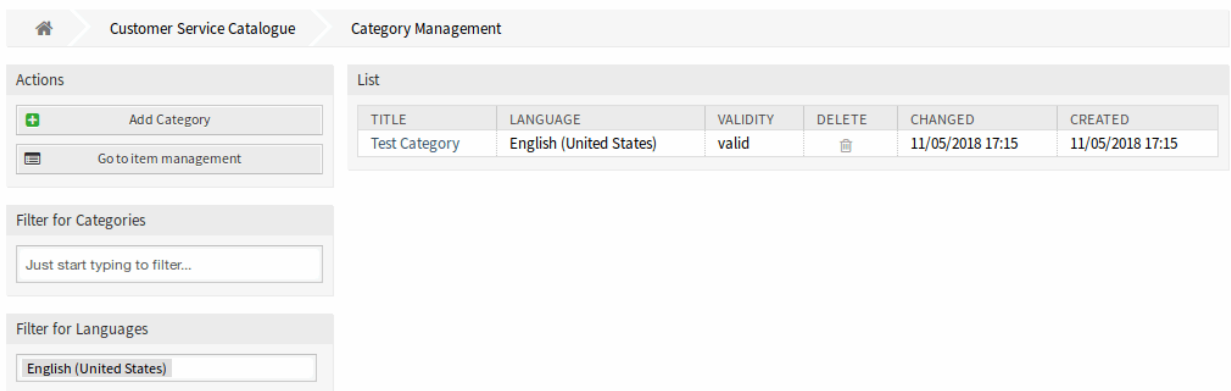
Sort options: Add new first level element:

Outbound sort order for xml fields (structure starting below function name wrapper) - see documentation for SOAP transport.

or or



6.1: Customer Service Catalogue



6.2: Category Management

* **Internal Title** (required) (max. 255 characters)

Validity (required) (enum: valid, invalid, invalid-temporarily)

* **Validity** (required) (enum: valid, invalid, invalid-temporarily)

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

6.1.2 Item Management

The following screenshot shows the 'Edit Item' form in the OTOBO administration interface.

6.6: Edit Item

The following steps describe how to edit an item:

1. Click on the 'Edit Item' button in the 'Item Management' section.
2. Edit the item details.
3. Click on the 'Save' button.

6.7: Add Item

The following steps describe how to add an item:

1. 内部タイトルを設定する
2. 有効性を設定する
3. 保存ボタンをクリックする

Edit Item

★ Internal Title:

★ Validity:

図 6.8: 内部タイトル

有効性を設定する

1. 有効性を有効にする
2. 保存ボタンをクリックする

Edit Item

★ Internal Title:

★ Validity:

図 6.9: 有効性を有効にする

注: 内部タイトルは一意である必要があります。

有効性

有効性を有効にする

注 * 有効性を有効にするには、このフィールドを valid に設定する必要があります。

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

注 * 有効性を無効にする

注 * 有効性を無効にするには、このフィールドを invalid に設定する必要があります。

注 * 有効性を一時的に無効にする

注 * 有効性を一時的に無効にするには、このフィールドを invalid-temporarily に設定する必要があります。

注: 内部タイトルは一意である必要があります。

注 * URLを設定する

注 * URLを設定するには、このフィールドに有効な URL を入力する必要があります。

6.2 管理

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

Use this screen to add custom pages for use in external interface. A fresh OTOBO installation already contains some custom pages by default. The custom page management screen is available in the Custom Pages module of the External Interface group.

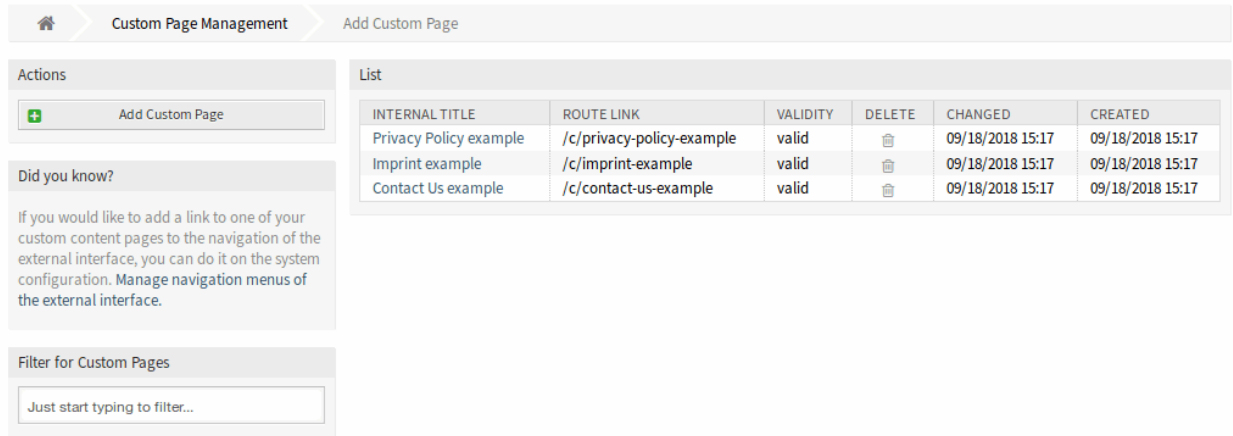


图 6.10: 管理

6.2.1 管理

注意: 此功能将在下一个 OTOBO 版本中包含。如果您需要提前使用，请联系我们 sales@otobo.de，我们将找到解决方案。

使用此屏幕为外部接口添加自定义页面。新鲜 OTOBO 安装已经包含一些默认自定义页面。自定义页面管理屏幕位于外部接口组中的自定义页面模块中。

1. 添加自定义页面
2. 管理
3. 删除

管理

1. 添加自定义页面
2. 管理
3. 删除

管理

1. 添加自定义页面
2. 删除

Add Custom Page

★ Internal Title:

★ Slug:

Route Link: Route will be available after saving the custom page.

★ Validity:

Custom Page Content

English (United States)

★ Title:

★ Content:

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

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

Add new custom page content:

Save Changes

or Cancel

6.11: Add Custom Page

Edit Custom Page

★ Internal Title:

★ Slug:

Route Link: /c/privacy-policy-example

★ Validity:

Custom Page Content

▼ English (United States) ⊞

★ Title:

★ Content:

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

Format ▾ | Font ▾ | Size ▾ | ▾ | ▾ | *I*_x | Source | | | | |

Here you can put the privacy policy that you would like to apply to your [OTRS](#) help center.

Add new custom page content:

Save Changes

or or Cancel

6.12:

List

INTERNAL TITLE	ROUTE LINK	VALIDITY	DELETE	CHANGED	CREATED
Privacy Policy example	/c/privacy-policy-example	valid		09/18/2018 15:17	09/18/2018 15:17
Imprint example	/c/imprint-example	valid		09/18/2018 15:17	09/18/2018 15:17
Contact Us example	/c/contact-us-example	valid		09/18/2018 15:17	09/18/2018 15:17

6.13:

注意: 本手册中的所有配置项均为必填项。

6.2.2 配置项

本手册中的所有配置项均为必填项。

注意 * 本手册中的所有配置项均为必填项。

Slug * 本手册中的所有URL均为必填项。

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

本手册中的所有配置项均为必填项。

注意 * 本手册中的所有配置项均为必填项。

注意 * 本手册中的所有配置项均为必填项。

本手册中的所有配置项均为必填项。

6.3 配置

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

本手册中的所有配置项均为必填项。

本手册中的所有配置项均为必填项。

注意: 本手册中的所有配置项均为必填项。

本手册中的所有配置项均为必填项。

6.3.1 配置

本手册中的所有配置项均为必填项。

本手册中的所有配置项均为必填项。

- 本手册中的所有配置项均为必填项。
- 本手册中的所有配置项均为必填项。
- 本手册中的所有配置项均为必填项。

本手册中的所有配置项均为必填项。

本手册中的所有配置项均为必填项。

Hero Unit

Title

Background Style

Background Image

Background Color

▼

6.14: Hero Unit

Ticket List

Show a ticket list for logged in users

Row Title

6.15: Ticket List

6.3.2 行タイトル

行タイトルを設定する場合は、このフィールドにテキストを入力してください。

このフィールドは必須ではありません。

6.3.3 行背景色

行背景色を設定する場合は、このフィールドに色を選択してください。

The screenshot shows a form titled "Image Teasers" with an "Add" button in the top right corner. Below the title bar, there are two main sections. The first section is labeled "Row Title" and contains a single-line text input field. The second section is labeled "Row Background Color" and contains a color selection interface consisting of a small square color swatch and a downward-pointing triangle arrow.

図 6.16: 行背景色

このフィールドは必須ではありません。

このフィールドは必須ではありません。このフィールドにテキストを入力すると、行の背景色は自動的に白になります。

このフィールドは必須ではありません。

このフィールドは必須ではありません。このフィールドにテキストを入力すると、行の背景色は自動的に白になります。

* 必須項目

* 必須項目

* 必須項目 (URL)

6.3.4 行タイトル

行タイトルを設定する場合は、このフィールドにテキストを入力してください。

このフィールドは必須ではありません。

このフィールドは必須ではありません。

* 必須項目


このフィールドは必須ではありません。

このフィールドは必須ではありません。

* 必須項目

このフィールドは必須ではありません。

Image ☐

 Select image to upload

★ Title

Create Custom Content Pages

★ Text

Use custom pages to provide your users with individualized content.

★ Link Target

/otrs/index.pl?Action=AdminCustomPage

6.17: Image

Link Lists Add

Row Title

6.18: Link Lists

★ Title ☰

Link Text (for the show more link)

Link Target (for the show more link)

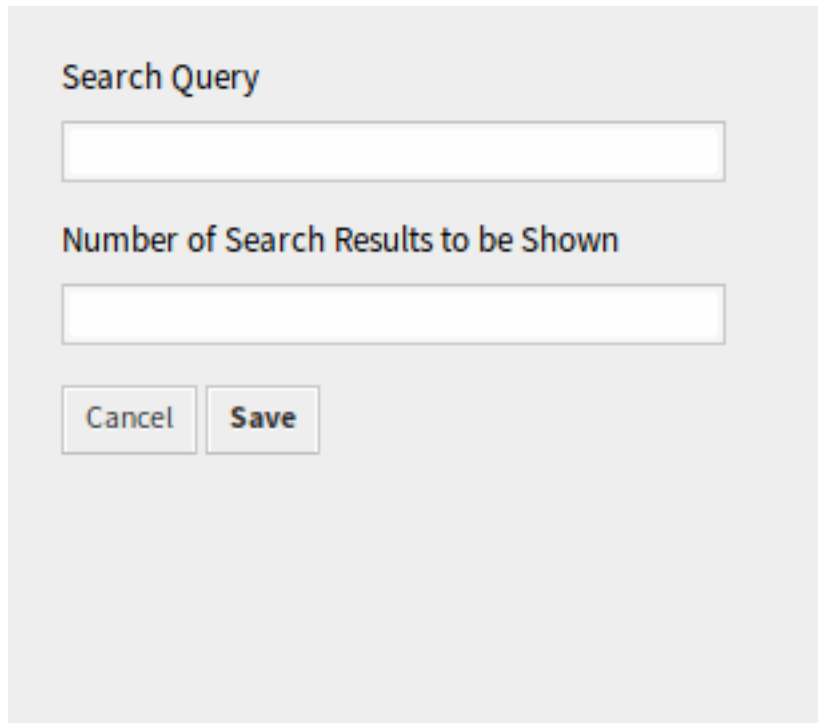
★ Link List Type

6.19: 6.19.1

<input type="text" value="/otrs/index.pl?Acti"/>	Manage service cat	-
<input type="text" value="/otrs/index.pl?Acti"/>	Manage custom cc	-
<input type="text" value="/otrs/index.pl?Acti"/>	Manage home pag	+

6.20: 6.20.1

Figure 6.21: Search Query dialog box



The image shows a dialog box titled "Search Query". It contains two text input fields. The first field is labeled "Search Query" and the second is labeled "Number of Search Results to be Shown". Below the input fields are two buttons: "Cancel" and "Save".

Figure 6.21: Search Query dialog box

6.3.5 Content Cards

Figure 6.22: Content Cards dialog box



The image shows a dialog box titled "Content Cards". In the top right corner, there is an "Add" button. Below the title bar, there is a label "Row Title" followed by a text input field.

Figure 6.22: Content Cards dialog box

1. Click the Content Cards icon in the left-hand navigation pane.

2. Click the Add button in the top right corner of the Content Cards dialog box.

3. * Enter a title for the content card.

4. * Enter a URL for the content card.

5. Click the OK button in the Content Cards dialog box.

6. The content card is added to the list of content cards.

☰

★ Title

★ Text

With OTRS 7, you can add even more helpful resources for your users like frequently asked

Link Text

Link Target

★ Link List Type

6.23: [Screenshot]

WEB

WEB

```
<script async src="https://www.example.com/track/js?id=UA-XXXXXX-Y"></script>
<script>
  window.dataLayer = window.dataLayer || [];
  function track () {dataLayer.push(arguments);}
  track('js', new Date());

  track('config', 'UA-XXXXXX-Y');
</script>
```

script

:

- 1.
2. ExternalFrontend::ExternalScripts
- 3.
- 4.
5. https://www.example.com/track/js?id=UA-XXXXXX-Y
- 6.
- 7.

- 1.
2. ExternalFrontend::InlineScripts
- 3.
- 4.
5. script

```
window.dataLayer = window.dataLayer || [];
function track () {dataLayer.push(arguments);}
track('js', new Date());

track('config', 'UA-XXXXXX-Y');
```

- 6.
- 7.

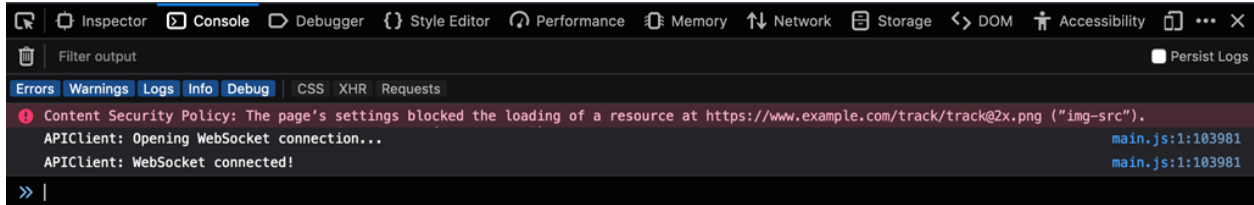


Figure 6.27: CSP Error

3. CSP
4. CSP `img-src` blocked loading of resource
5. CSP error message: `https://www.example.com/track/track@2x.png`
6. CSP error message
7. CSP error message

Content Security Policy: The page's settings blocked the loading of a resource at https://www.example.com/track/track@2x.png ("img-src").

APIClient: Opening WebSocket connection...

main.js:1:103981

APIClient: WebSocket connected!

main.js:1:103981

Tip: Whitelisting external resources opens potential security risks in your OTOBO application! Only allow those resources that you are sure are not malicious and come from reputable sources. Keep in mind that if something is secure today, does not mean it will be tomorrow. Stay safe!

Tip: Whitelisting external resources opens potential security risks in your OTOBO application! Only allow those resources that you are sure are not malicious and come from reputable sources. Keep in mind that if something is secure today, does not mean it will be tomorrow. Stay safe!

Rother OSS Services

XX

The following chapter describes the tools you have available to integrate your system with the powerful cloud service offered by Rother OSS.

7.1 XXXX

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

Use this screen to add cloud services to the system. A fresh OTOBO installation doesn't contain any configured cloud services by default. The cloud service management screen is available in the Cloud Services module of the Rother OSS Services group.

	NAME	DESCRIPTION
<input type="checkbox"/>	SMS	This will allow the system to send text messages via SMS.

Fig. 7.1: XXXXXXXX

7.1.1 XXXXXX

XXXXXXXXXX

10

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

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXXXX * XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXX * XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXX * XXXXXXXXXXXXXXXXXXXXXXX11XXXXXX

XX

XXXXXXXXXXXXXXXXXXXX

XXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX +491791234567XXXXXXXXXXXX

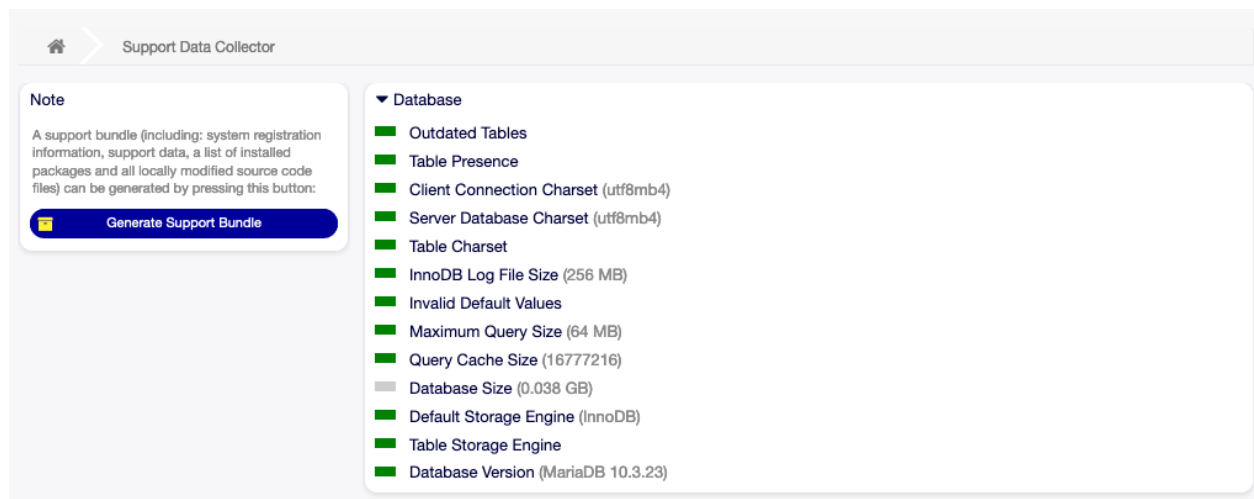
XX XXXXXXXXXXXXXXX XXX

1010 Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the resource.

10101010 In order to be able to use the SMS transmission feature of the Rother OSS GmbH, the Data Protection Information needs to be read and understood.

7.2 10101010

Support data collector is used to collect some data and sent to Rother OSS on a regular basis. Use this screen to review the data to be sent to Rother OSS.



10 7.3: 10101010

7.2.1 支持数据收集器

支持数据收集器用于收集一些数据并定期发送到 Rother OSS，如果系统已注册。要注册您的系统：

1. 注册支持数据收集器
2. 配置支持数据收集器

注册支持数据收集器

1. 注册支持数据收集器
2. 配置支持数据收集器

配置支持数据收集器

1. 注册支持数据收集器

配置支持数据收集器

1. 注册支持数据收集器
2. 配置支持数据收集器
3. 配置支持数据收集器

Support Bundle
✕

The Support Bundle has been Generated

Please choose one of the following options.

Send by Email

Name:

Email:

[Send](#)

The support bundle will be sent to OTOBO Team via email automatically.

Download File

[Download](#)

A file containing the support bundle will be downloaded to the local system. Please save the file and send it to the OTOBO Team, using an alternate method.

[Close this dialog](#)

图 7.4: 注册支持数据收集器

7.2.2 配置

配置

- LED配置
- LED配置
- LED配置
- LED配置

配置

This section displays information about OTOBO cloud services.

配置 LED配置

配置

This section displays information about the database used by OTOBO.

配置 LED配置

配置

配置 utf8

配置 utf8

配置 utf8

InnoDB配置 InnoDB配置 512 MB

配置 LED配置

配置 1024 MB

配置

配置 InnoDB

配置 InnoDB

配置 LED配置

配置

配置

配置

配置

配置

配置

配置

OTOBODISKPARTITION

OTOBODISKPARTITION

OTOBODISKPARTITION

OTOBO Disk Partition Display the disk partition to where OTOBO is installed.

OTOBODISKPARTITION

OTOBODISKPARTITION

OTOBODISKPARTITION

OTOBODISKPARTITION CPU8CPU8

Perl Perl

OTOBODISKPARTITION(%) 60%

OTOBODISKPARTITION(MB) 200 MB

OTOBO Section

This section displays information about the OTOBO instance.

OTOBODISKPARTITION

OTOBODISKPARTITION

OTOBODISKPARTITION

OTOBODISKPARTITION24

OTOBODISKPARTITION

OTOBODISKPARTITION

OTOBODISKPARTITION

OTOBODISKPARTITION Display whether the OTOBO daemon is running or not.

OTOBODISKPARTITION Display the main OTOBO object and the related number of records in the database.

OTOBODISKPARTITION LED

OTOBODISKPARTITION

OTOBODISKPARTITION Display the fully qualified domain name set in system configuration setting FQDN.

OTOBODISKPARTITION

OTOBODISKPARTITION LED

OTOBODISKPARTITION LED

OTOBODISKPARTITION Green LED means, that the OTOBO framework version is suitable for the installed packages.

OTOBODISKPARTITION Green LED means, that all installed packages are verified by the Rother OSS.

OTOBODISKPARTITION

OTOBODISKPARTITION

OTOBODISKPARTITION ID Display the system identifier set in system configuration setting SystemID.

OTOBODISKPARTITION Display the ticket index module set in system configuration setting Ticket::IndexModule.

OTOBODISKPARTITION

票索引模块默认配置为60,000

Display the ticket search index module set in system configuration setting
Ticket::SearchIndex::ForceUnfilteredStorage.

ticket_index 显示 ticket_index 索引

ticket_lock_index 显示 ticket_lock_index 索引

Display timezone information for OTOBO, for the calendars and for users.

- 显示日历时区信息

- 显示用户时区信息

- 显示系统时区信息

OTOBO Version Display the version number of OTOBO.



OTOBOT offers several administration tools to configure, monitor, control and extend OTOBO.

8.1 OTOBO

OTOBOT 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 manage calendars in the system. A fresh OTOBO installation contains no calendars by default. The calendar management screen is available in the Calendars module of the Administration group.

Use this screen to manage calendars in the system. A fresh OTOBO installation contains no calendars by default. The calendar management screen is available in the Calendars module of the Administration group.

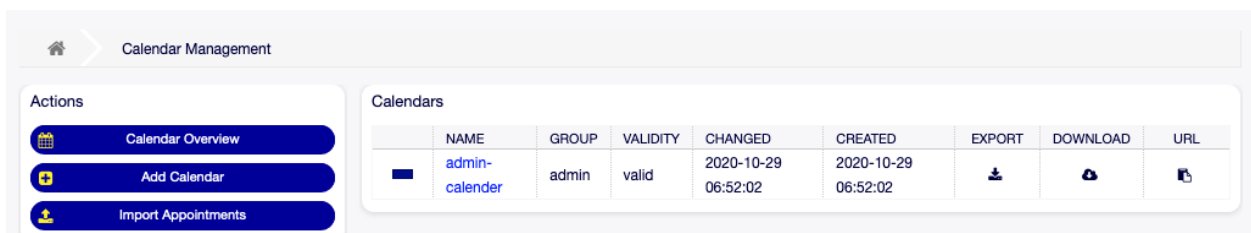


Figure 8.1: Calendar Management

8.1.1 OTOBO

OTOBOT offers several administration tools to configure, monitor, control and extend OTOBO.

4. 4.1.1.1

4.1.1.1.1

8.1.2

8.1.2.1

8.1.2.1.1

8.1.2.1.1.1

8.1.2.1.1.1.1

8.1.2.1.1.1.1.1

8.1.2.1.1.1.1.1.1

8.1.2.1.1.1.1.1.1.1

- 8.1.2.1.1.1.1.1.1.1.1
- 8.1.2.1.1.1.1.1.1.1.1
- 8.1.2.1.1.1.1.1.1.1.1
- 8.1.2.1.1.1.1.1.1.1.1

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

8.1.2.1.1.1.1.1.1.1.1.1

8.1.2.1.1.1.1.1.1.1.1.1.1

8.1.2.1.1.1.1.1.1.1.1.1.1.1

8.1.2.1.1.1.1.1.1.1.1.1.1.1

8.1.2.1.1.1.1.1.1.1.1.1.1.1.1

8.1.2.1.1.1.1.1.1.1.1.1.1.1.1

8.1.3


8.1.3.1

8.1.3.1.1

- 8.1.3.1.1.1
- 8.1.3.1.1.2
- 8.1.3.1.1.3

8.1.3.1.1.1 * 8.1.3.1.1.1.1

▼ Ticket Appointments


Rule 1 

Start date:


End date:

Use options below to narrow down for which tickets appointments will be automatically created.

★ Queues:

Search attributes: 

Define rules for creating automatic appointments in this calendar based on ticket data.

 **Add Rule**

8.4: 8.4.1 - 8.4.2

Import Appointments

★ Upload: Keine Datei ausgewählt.

★ Calendar:

Update existing appointments?

All existing appointments in the calendar with same UniqueID will be overwritten.

Import appointments or [Cancel](#)

8.5: 8.5.1 - 8.5.2

*

:

UniqueID

8.2

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

OTOBO offers chat channels with different permissions per channel, so it is, e.g. possible to have different chat channels for registered contract customers and public prospects.

Use this screen to add chat channels to the system. A fresh OTOBO installation contains no chat channels by default. The chat channel management screen is available in the Chat Channels module of the Administration group.

Manage Chat Channels

NAME	GROUP	COMMENT	CUSTOMER	PUBLIC	VALIDITY	CHANGED	CREATED
Test Channel	users	This is a test channel.	no	no	valid	2018-11-07 08:09:30	2018-11-07 08:09:30

8.6:

8.2.1

- 1.
- 2.
- 3.

:

- 1.
- 2.
- 3.

Add Chat Channel

★ Name:

★ Group:

Available to customer users:

Available to public users:

★ Valid:

Comment:

or

8.7: Add Chat Channel

Edit Chat Channel

★ Name:

★ Group:

Available to customer users:

Available to public users:

★ Valid:

Comment:

or or

8.8: Edit Chat Channel

8.2.2 ทรัพยากร

ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

* ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

* ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

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

ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

8.2.3 ทรัพยากร

ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

1. ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น
2. ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น Core → Chat
3. ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น ChatEngine::Active

ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

1. ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น
2. ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น ChatEngine
3. ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

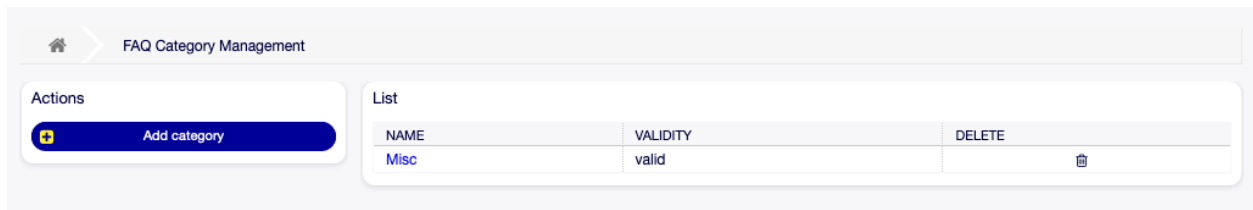
ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น ro ทรัพยากรที่แสดงในหน้านี้สามารถใช้งานได้เฉพาะใน OTOBO เท่านั้น

- ChatEngine::PermissionGroup::ChatReceivingAgents
- ChatEngine::PermissionGroup::ChatStartingAgents

8.3 FAQ

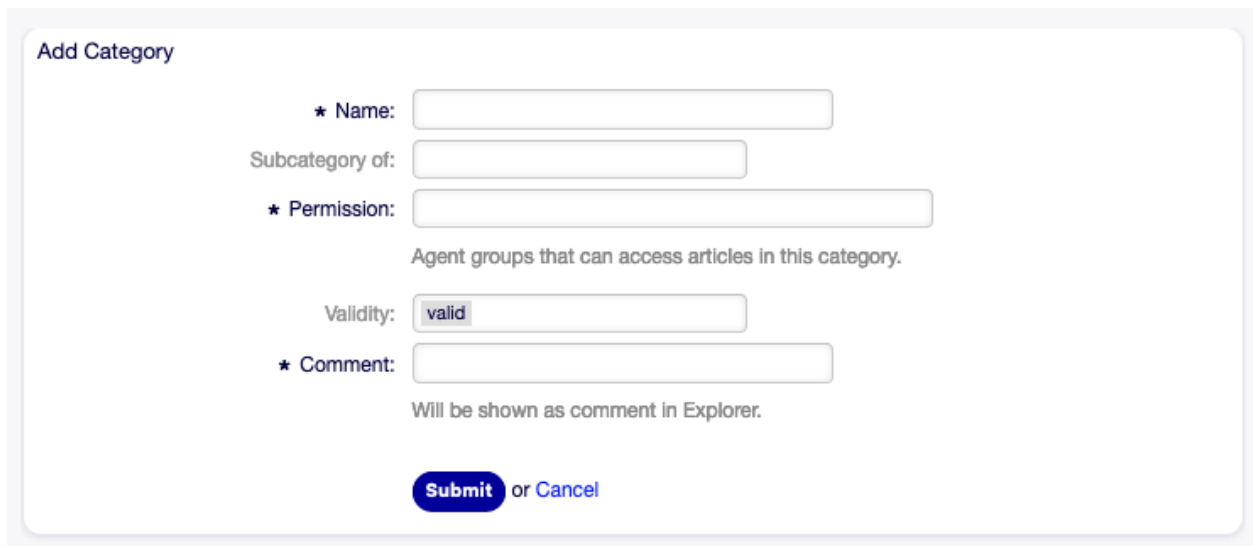
Use this screen to manage categories available in FAQ articles. The FAQ package can be installed from the OTOBO addons repository with the `faq` package. A fresh OTOBO installation already contains a category by default. The category management screen is available in the FAQ Category module of the Administration group.



8.9: FAQ

8.3.1 FAQ

- 1.
- 2.
- 3.



8.10:

- 1.
- 2.
- 3.

- 1.
- 2.

8.3.2 FAQ

Edit Category

★ Name:

Subcategory of:

★ Permission:

Agent groups that can access articles in this category.

Validity:

★ Comment:

Will be shown as comment in Explorer.

Submit or [Cancel](#)

8.11: Edit Category

List

NAME	VALIDITY	DELETE
Misc	valid	

8.12: Category List

*

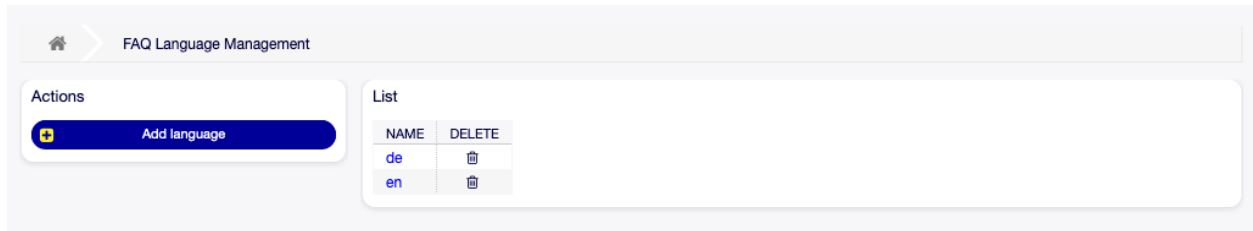
*

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

*

8.4 FAQ

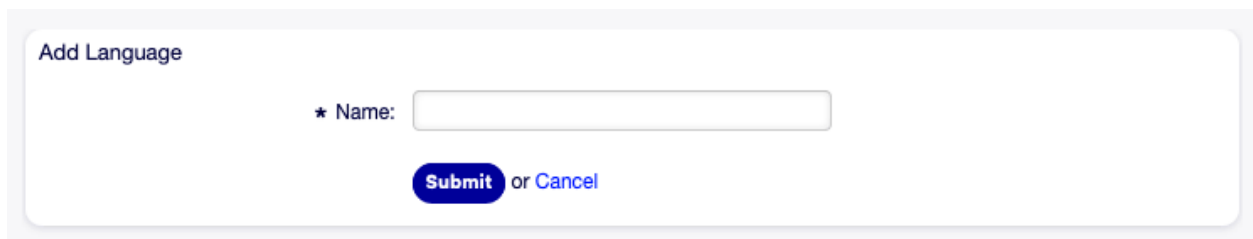
Use this screen to manage languages available in FAQ articles. A fresh OTOBO installation already contains some languages by default. The language management screen is available in the FAQ Language module of the Administration group.



8.13: FAQ

8.4.1 FAQ

1.
2.
3.



8.14:

1.
2.
3.

Edit Language

* Name:

Submit or [Cancel](#)

8.15: Edit Language

1. Edit Language
2. Edit Language

List

NAME	DELETE
de	
en	

8.16: List Languages

8.4.2 FAQ

FAQ

* ISO 639-1

8.5

Package Manager

OTOBO uses a package manager to perform all package-related activities as mentioned above in the graphical interface.

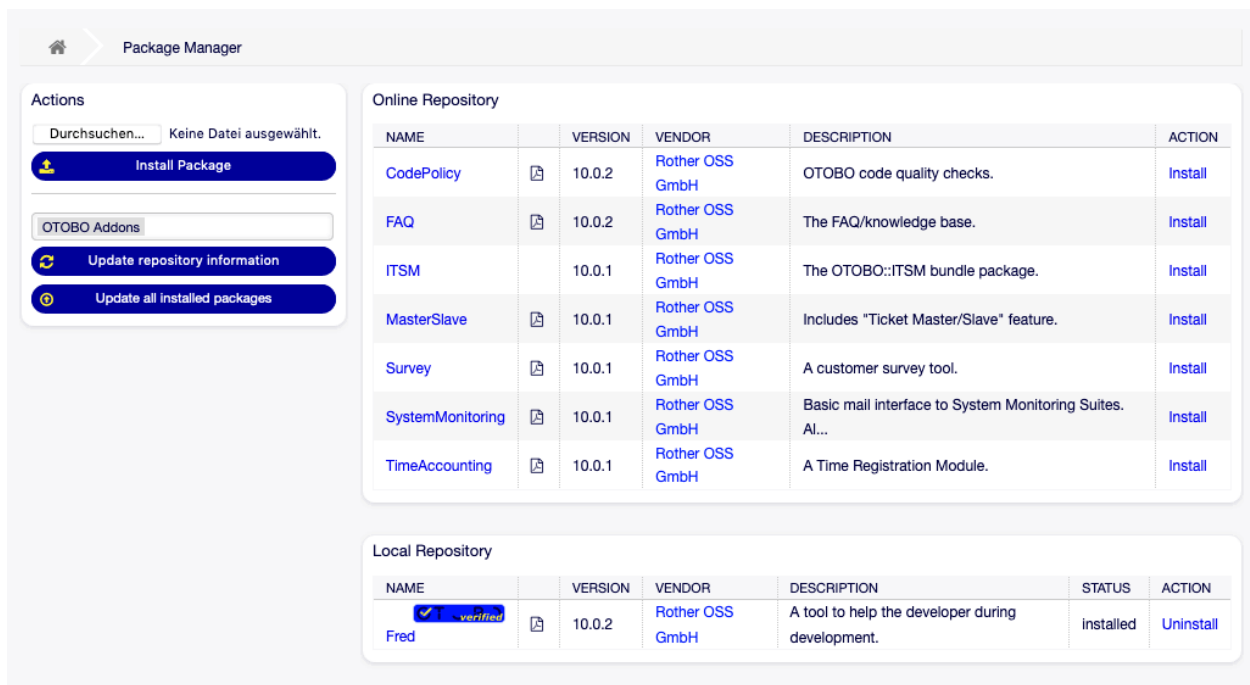
Use this screen to install and manage packages that extend the functionality of OTOBO. The package manager screen is available in the Package Manager module of the Administration group.

8.5.1

Note: The installation of packages which are not verified by Rother OSS is possible by default, cause we love open source.

Note:

You can deactivate the installation of not verified packages in the system configuration setting `Package::AllowNotVerifiedPackages`.



8.17: Package Manager

8.18

8.18.1

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

8.18.2

The repository list can be changed in system configuration setting `Package::RepositoryList`.

8.18.3

1. ...
2.opm ...
3. ...
4. ...
5. ...

8.18.4

8.18.5

1. ...

Online Repository

NAME		VERSION	VENDOR	DESCRIPTION	ACTION
CodePolicy		10.0.2	Rother OSS GmbH	OTOBO code quality checks.	Install
FAQ		10.0.2	Rother OSS GmbH	The FAQ/knowledge base.	Install
ITSM		10.0.1	Rother OSS GmbH	The OTOBO::ITSM bundle package.	Install
MasterSlave		10.0.1	Rother OSS GmbH	Includes "Ticket Master/Slave" feature.	Install
Survey		10.0.1	Rother OSS GmbH	A customer survey tool.	Install
SystemMonitoring		10.0.1	Rother OSS GmbH	Basic mail interface to System Monitoring Suites. AI...	Install
TimeAccounting		10.0.1	Rother OSS GmbH	A Time Registration Module.	Install

8.18: Online Repository

Local Repository

NAME		VERSION	VENDOR	DESCRIPTION	STATUS	ACTION
Fred		10.0.2	Rother OSS GmbH	A tool to help the developer during development.	installed	Uninstall

8.19: Local Repository

2. ...
3. ...
4. ...

...

1. ...
2.opm ...
3. ...
4. ...
5. ...

...

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

...

...:

...

...



...

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

...

...

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

Local Repository						
NAME	VERSION	VENDOR	DESCRIPTION	STATUS	ACTION	
 Fred	 10.0.2	Rother OSS GmbH	A tool to help the developer during development.	installed	Uninstall	

8.20: ...

8.6 Performance Log

OTOBO supports this requirement with the performance log. The performance log can, when it is activated, log activities and display various activity types and their min/max/average response time and a number of requests for different time frames.

Use this screen to view the performance log of OTOBO. The log overview screen is available in the Performance Log module of the Administration group.

Note: To be able to see performance log in OTOBO, you have to enable its setting first.

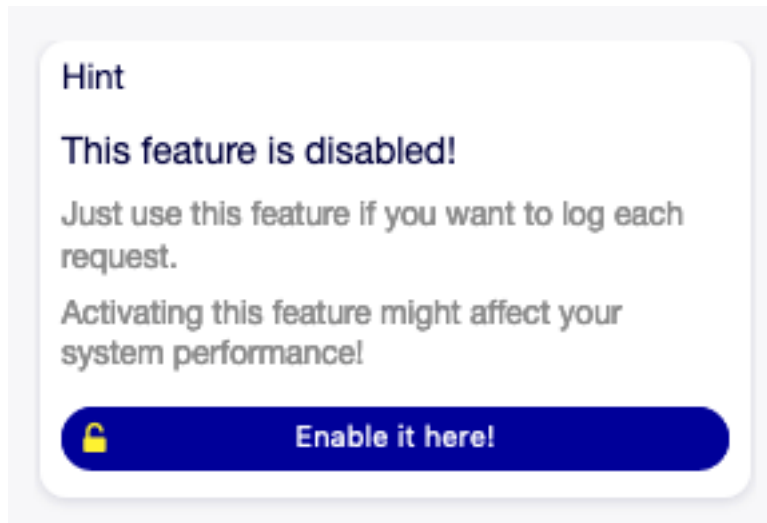


Figure 8.21: Performance Log Hint

If the performance log is enabled, OTOBO collects all the information about requests and responses in an overview table.

Figure 8.22: Performance Log Overview

8.7 Session Management

OTOBO offers the session management to quickly get an overview of agent and customer sessions, unique agents and customers currently logged in and the ability to kill sessions with just a mouse click.

Figure 8.23: Session Management Overview

8.7.1 Agent Sessions

Figure 8.24: Agent Sessions Overview

1. Agent Sessions Overview
2. Agent Sessions Detail

Overview

Range (last 5 m)

INTERFACE	REQUESTS	MIN RESPONSE	MAX RESPONSE	AVERAGE RESPONSE
Agent	14	0s	1s	0.07s
Admin	2	0s	0s	0s
AdminPackageManager&AJAXGetPackageUpg...	1	0s	0s	0s
AdminPerformanceLog	1	0s	0s	0s
AdminSystemConfiguration&AJAXNavigati...	1	0s	0s	0s
AdminSystemConfigurationDeployment;Su...	1	1s	1s	1s
AdminSystemConfigurationDeployment;Su...	1	0s	0s	0s
AdminSystemConfigurationDeployment;Su...	1	0s	0s	0s
AdminSystemConfigurationDeploymentHis...	1	0s	0s	0s
AdminSystemConfigurationGroup	1	0s	0s	0s
AdminSystemConfigurationGroup&Lock	1	0s	0s	0s
AdminSystemConfigurationGroup;Subacti...	2	0s	0s	0s
AdminSystemConfigurationGroup;Subacti...	1	0s	0s	0s

Range (last 30 m)

INTERFACE	REQUESTS	MIN RESPONSE	MAX RESPONSE	AVERAGE RESPONSE
Agent	55	0s	1s	0.07s
Admin	7	0s	0s	0s
AdminAppointmentCalendarManage	1	0s	0s	0s
AdminAppointmentImport	1	0s	0s	0s
AdminPackageManager	4	0s	1s	0.5s
AdminPackageManager&AJAXGetPackageUpg...	28	0s	0s	0s
AdminPackageManager&ChangeRepository	2	0s	0s	0s
AdminPerformanceLog	1	0s	0s	0s
AdminSystemConfiguration&AJAXNavigati...	1	0s	0s	0s
AdminSystemConfigurationDeployment;Su...	1	1s	1s	1s
AdminSystemConfigurationDeployment;Su...	1	0s	0s	0s
AdminSystemConfigurationDeployment;Su...	1	0s	0s	0s
AdminSystemConfigurationDeploymentHis...	1	0s	0s	0s
AdminSystemConfigurationGroup	1	0s	0s	0s
AdminSystemConfigurationGroup&Lock	1	0s	0s	0s
AdminSystemConfigurationGroup;Subacti...	2	0s	0s	0s
AdminSystemConfigurationGroup;Subacti...	1	0s	0s	0s
AgentDashboard	1	1s	1s	1s

8.22: Performance Overview

Range (last 5 m)

Interface: Agent, **Module:** -, **Period:** 1 minutes


DATE	REQUESTS	MIN	MAX	AVERAGE	
11/03/2020 17:44 (Europe/Berlin)	0	0s	0s	0s	
11/03/2020 16:44 (Europe/Berlin)	0	0s	0s	0s	
11/03/2020 15:44 (Europe/Berlin)	0	0s	0s	0s	
11/03/2020 14:44 (Europe/Berlin)	0	0s	0s	0s	
11/03/2020 13:44 (Europe/Berlin)	3	0s	0s	0s	

8.23:          

Session Management

Actions

All sessions	3
Agent sessions	3
Customer sessions	0
Unique agents	2
Unique customers	0







 Kill all sessions

Filter for Sessions

Just start typing to filter...

List

SESSION	TYPE	USER	KILL
PrGkP1RAnLx5FRmhBkJ64V07Cn6ARg	Agent	Super Admin	Kill this session
vXbytpYO8avQnFZZciDWRliGrSMBJx11	Agent	Admin OTOBO	Kill this session
xq0HHjd0EwvF2ucwjaCL8R1CBBwKadbV	Agent	Admin OTOBO	Kill this session

8.24:      

3. 詳細情報

Detail View for SessionID: PrGkP1RAnLxx5FRmhBkNJ64V07Cn6ARg - Super Admin

KEY	VALUE
AdminCommunicationLogPageShown	25
AdminDynamicFieldsOverviewPageShown	25
ChangeTime	2020-11-02 12:01:47
CreateTime	2020-09-21 17:16:35
SessionID	PrGkP1RAnLxx5FRmhBkNJ64V07Cn6ARg
SessionSource	AgentInterface
UserChallengeToken	I7ss5MyXPLmt4JOPGoyLUoSCMOB30FVT
UserEmail	sa@trash-mail.net
UserFirstname	Super
UserFullname	Super Admin
UserID	2
UserLanguage	en
UserLastLogin	1604422064
UserLastLoginTimestamp	2020-11-03 16:47:44
UserLastRequest	1604422235
UserLastname	Admin
UserLogin	sa
UserMobile	+49171471108
UserPw	[xxx]
UserRemoteAddr	62.99.246.203
UserRemoteUserAgent	Mozilla/5.0 (Macintosh; Intel Mac OS X 10.14; rv:82.0) Gecko/20100101 Firefox/82.0
UserSessionStart	2020-11-03 16:47:45 / 0 h
UserTicketOverviewMediumPageShown	20
UserTicketOverviewPreviewPageShown	15
UserTicketOverviewSmallPageShown	25
UserTimeZone	Europe/Berlin
UserType	User
ValidID	1

図 8.25: 詳細情報

注意事項

1. 詳細情報は、セッションの有効期限が切れた後でも表示されます。
2. 詳細情報は、セッションの有効期限が切れた後でも表示されます。

注: 詳細情報は、セッションの有効期限が切れた後でも表示されます。

注意事項

1. 詳細情報は、セッションの有効期限が切れた後でも表示されます。

List

SESSION	TYPE	USER	KILL
PrGkP1RAnLxx5FRmhBkNJ64V07Cn6ARg	Agent	Super Admin	Kill this session
vXbyfpYO8avQnFZZciDWRiiGrsMBJx11	Agent	Admin OTOBO	Kill this session
xq0HHjd0EwvF2ucwjaCL8R1CBBwKadbV	Agent	Admin OTOBO	Kill this session

8.26: Sessions

OTOBO: The OTOBO application database is located at the following path:

OTOBO: The OTOBO application database is located at the following path:

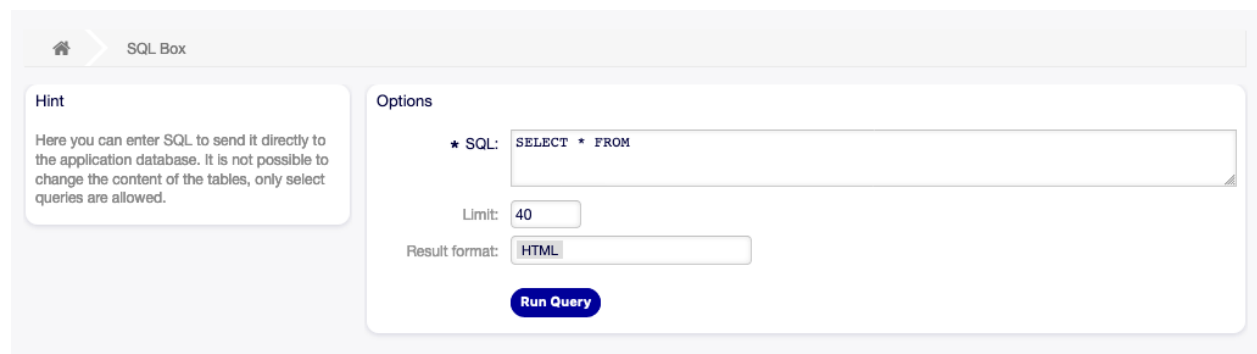
8.8 SQL

Direct access to the database requires access to the command line which an administrator may not have. In addition to username and password for the command line access, which is not given by all organizations, the username and password for the database are needed. These hurdles can prevent an administrator from using the database for more complex searches and operations.

OTOBO offers application administrators the SQL Box in the GUI (graphical user interface). It allows read access to the database. All results can be seen in the GUI or exported to CSV/Excel files.

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8.27: SQL Box

8.8.1 SQL

OTOBO: The SQL statements entered here are sent directly to the application database. By default, it is not possible to change the content of the tables, only SELECT queries are allowed.

2 Results

ID	LOGIN	FIRST_NAME	LAST_NAME	VALID_ID
1	root@localhost	Admin	OTOBO	1
2	sa	Super	Admin	1

8.29: SQL

```
SELECT * FROM users
```

8.9

OTOBO uses a comfortable graphical interface to configure the system. All changes to the default system configuration are stored in the database and can be audited (who changed a setting and when, what was the old and what is the new value) and rolled back to a previous state in case of misconfiguration.

By using the System Configuration History package, you can easily roll back changes made by users. Contact sales@otobo.de to add this feature to your system. In one of the next OTOBO releases this feature is included in the standard framework.

Use this screen to manage the system configuration settings. OTOBO brings about 2200 configuration settings. The system configuration management screen is available in the System Configuration module of the Administration group.

8.9.1

Kernel/Config.pm

FirstnameLastnameOrder

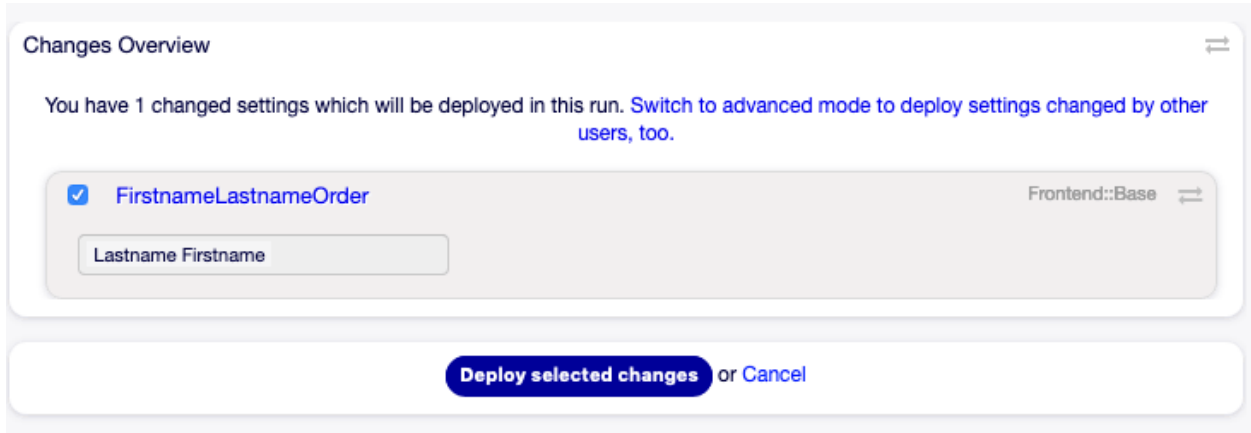
1. lastname
- 2.
- 3.
- 4.
5. Click on the Edit this setting button to activate the edit mode. In edit mode the widget gets a yellow border on the left.

8.30: 00000 - 00000

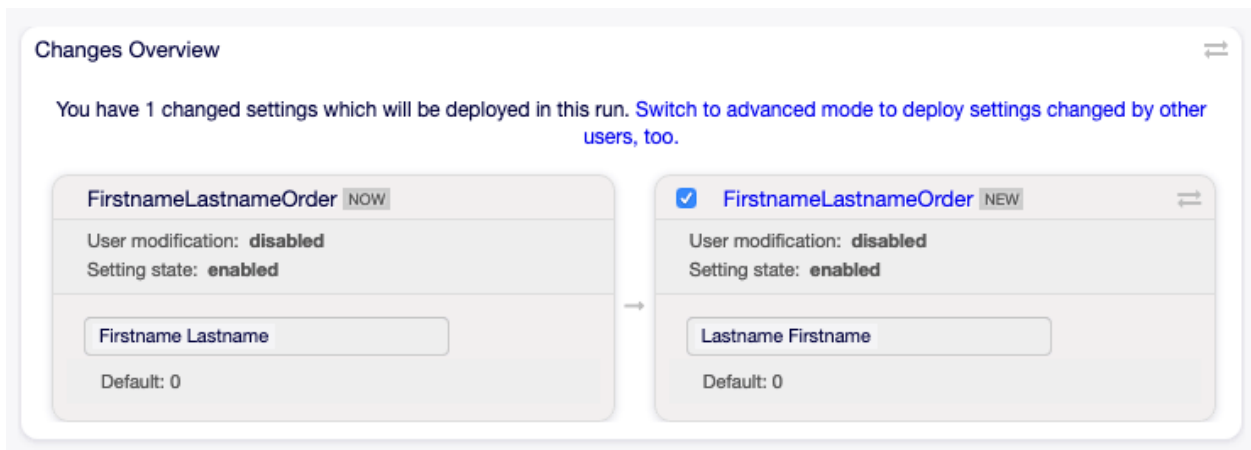
8.31: 00000 - 00000

8.32: 00000 - 00000

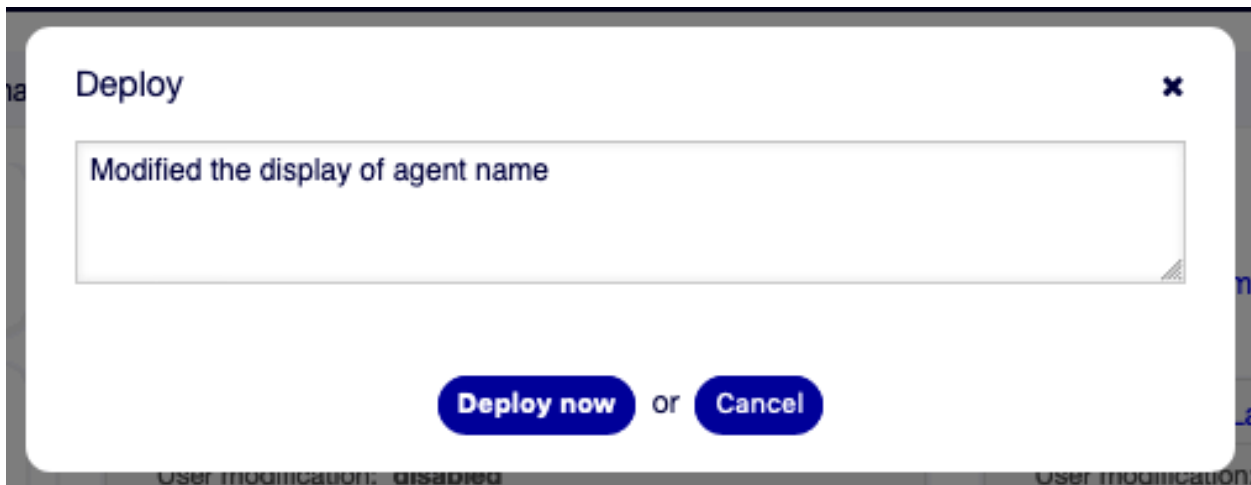
8.33: 00000 - 0000000



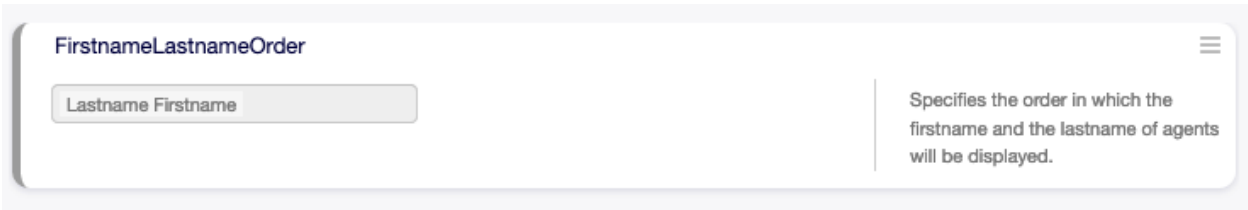
8.37: Before - After



8.38: Before - After

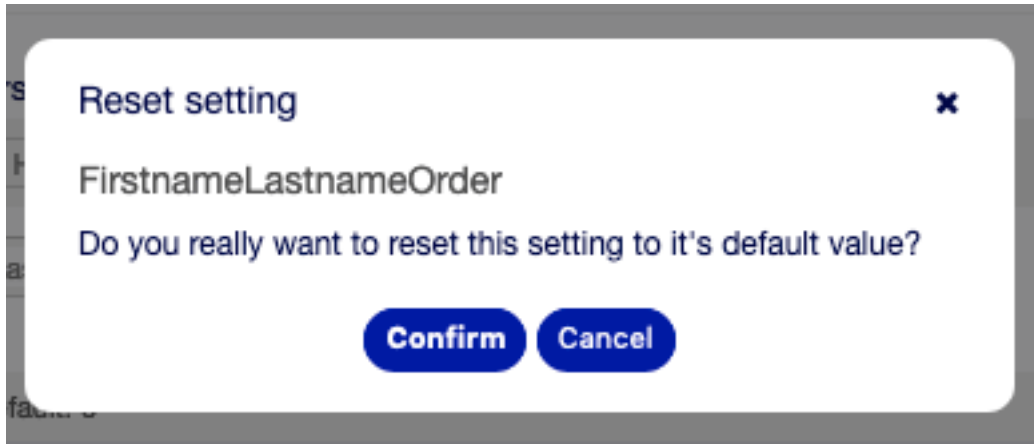


8.39: Before - After



8.40: 設定 - 詳細

- 14. 設定をリセットする



8.41: 設定 - 詳細

- 15. 設定をリセットする

- 16. 設定をリセットする

8.9.2 設定

設定をリセットする

設定をリセットする

設定をリセットする

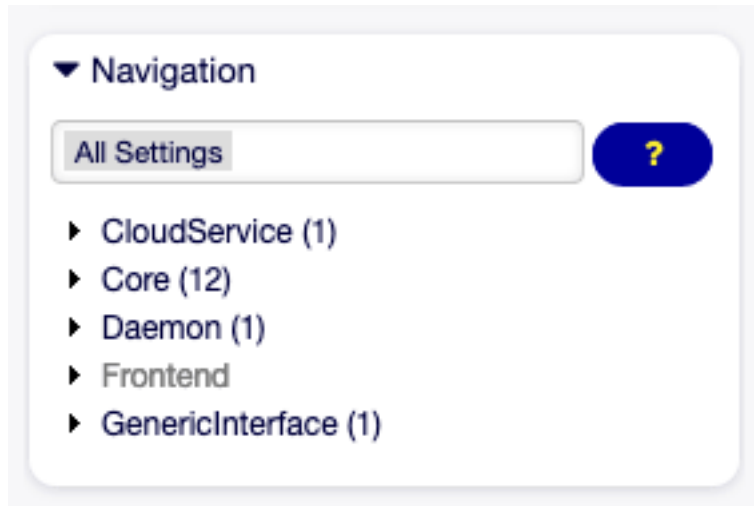
設定 FirstnameLastnameOrder 設定 Frontend → Base 設定

8.9.3 設定

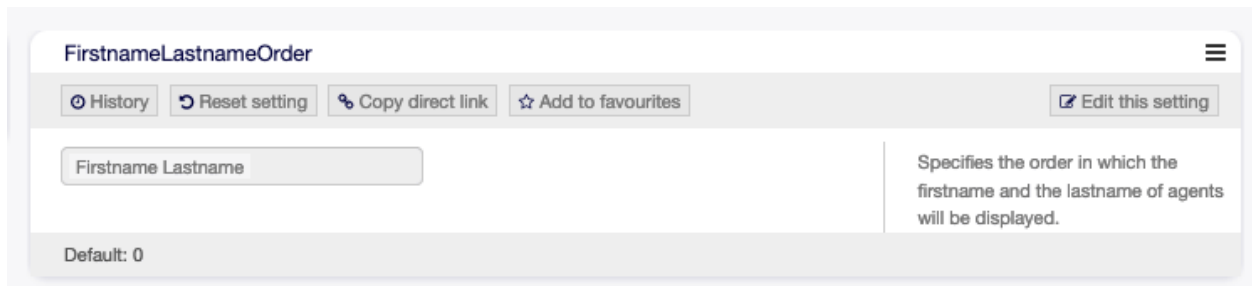
設定をリセットする

設定をリセットする

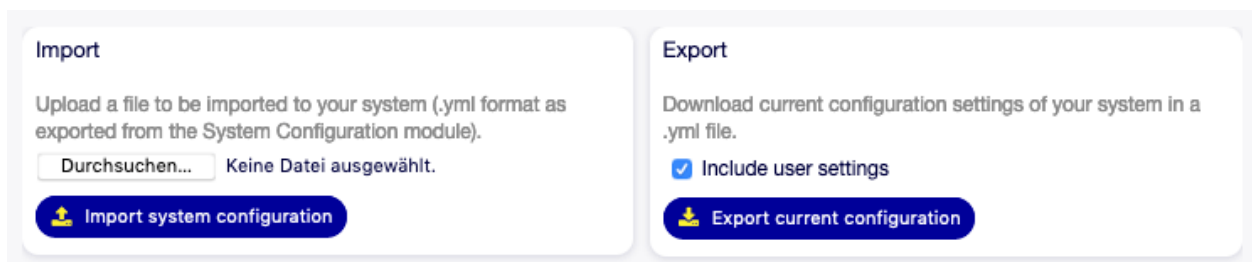
1. 設定をリセットする
2. export_current_system_configuration.yml 設定をリセットする



8.42: Navigation



8.43: Firstname - Lastname



8.44: Import - Export

3. 設定ファイルの作成

設定ファイル

1. 設定ファイルの作成
2. 設定ファイルの .yml 形式
3. 設定ファイルの作成

8.10 ログ

システムログの表示方法

These logs are usually not available to application administrators without a certain level of permissions, and skills on the operating system.

OTOBO allows application administrators to access the system log comfortably by using the graphical interface without the need to have access to the server's command shell. The administrator can decide which level of logging is needed, to make sure that the log files are not unnecessarily filled.

Use this screen to view log entries of OTOBO. The log overview screen is available in the System Log module of the Administration group.

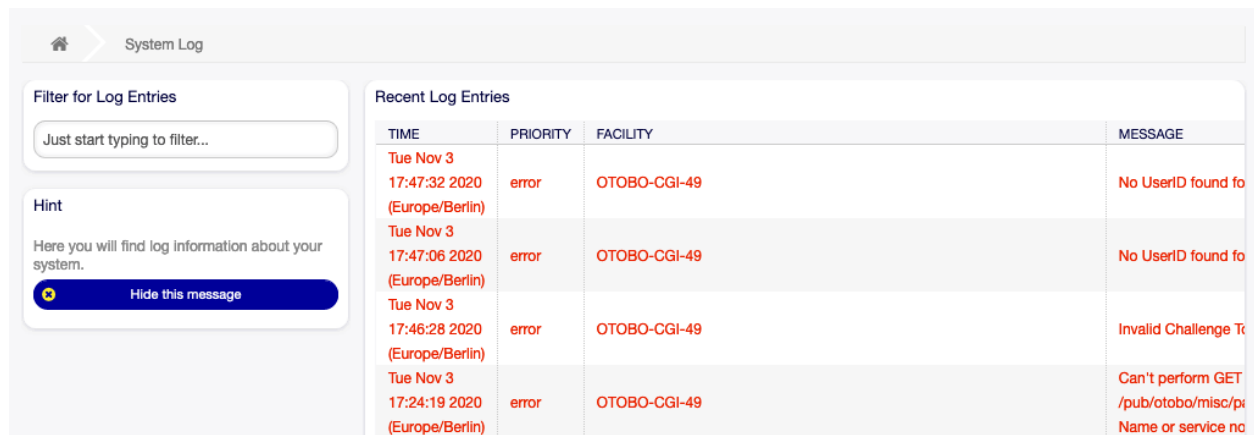


図 8.45: システムログ

システムログの表示方法

設定: システムログの表示方法

8.10.1 ログの表示

Core → Log

8.11 ログ

システムログの表示方法

OTOBO supports this with the System Maintenance module, which allows administrators to schedule maintenance windows in advance and inform users with login messages and notifications about the planned maintenance. Also, during a scheduled maintenance window, only administrators are allowed to log into the system.

Figure 8.46: System Maintenance Management

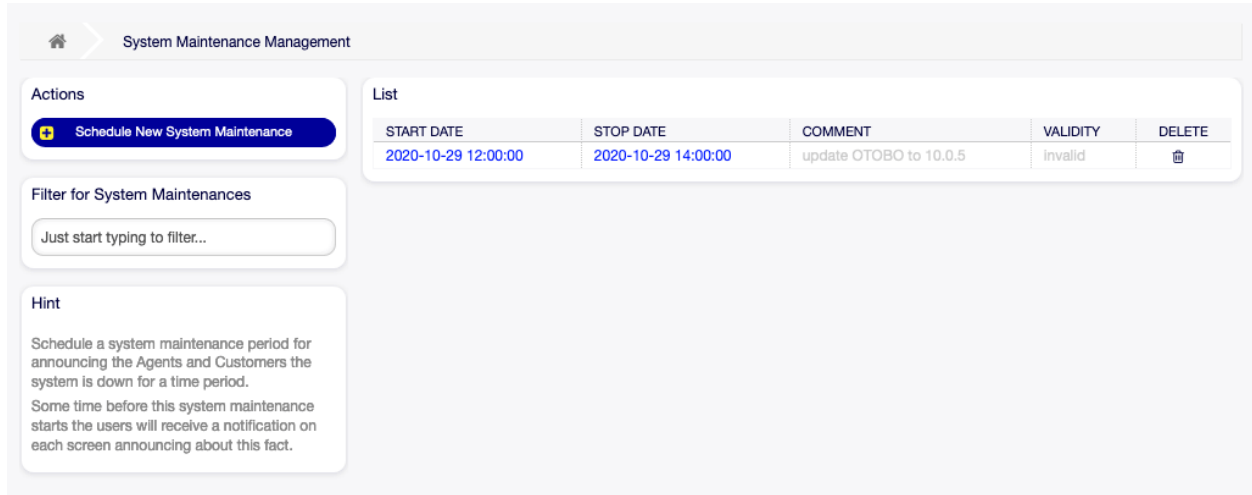


Figure 8.46: System Maintenance Management

8.11.1 Scheduling

1. Log in as an administrator.

1. Click on the System Maintenance icon in the left sidebar.
2. Click on the Schedule New System Maintenance button.
3. Fill in the required fields.

2. Click on the Schedule New System Maintenance button.

1. Fill in the required fields: Start Date, Stop Date, Comment, Validity, and Delete.
2. Click on the Save button.
3. The system will show the scheduled maintenance window.

3. Click on the Save button.

1. The system will show the scheduled maintenance window.
2. The system will show the scheduled maintenance window.

Figure 8.47: Scheduling

8.11.2 Cancellation

1. Log in as an administrator.

2. Click on the System Maintenance icon in the left sidebar.

Schedule New System Maintenance

★ Start date: 11 / 18 / 2020 - 10 : 26

★ Stop date: 11 / 18 / 2020 - 10 : 26

★ Comment:

Login message:

Show login message:

Notify message:

★ Validity: valid

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

8.47: 〇〇〇〇〇〇〇〇〇〇〇〇

▼ Edit System Maintenance Information

Start date: 10 / 29 / 2020 - 12 : 00

Stop date: 10 / 29 / 2020 - 14 : 00

★ Comment: update OTOBO to 10.0.5

Login message: OTOBO not running for update reasons

Show login message:

Notify message:

★ Validity: invalid

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

8.48: 〇〇〇〇〇〇〇〇〇〇〇〇

List

START DATE	STOP DATE	COMMENT	VALIDITY	DELETE
2020-10-29 12:00:00	2020-10-29 14:00:00	update OTOBO to 10.0.5	invalid	

8.49:

*

:

- SystemMaintenance::IsActiveDefaultLoginErrorMessage
- SystemMaintenance::IsActiveDefaultLoginMessage
- SystemMaintenance::IsActiveDefaultNotification

If checked, the login message is displayed in the login screen of OTOBO.

:

- SystemMaintenance::TimeNotifyUpcomingMaintenance

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

▼ Manage Sessions

All Sessions 1

Unique agents 1

Unique customers 0

Agent Sessions

SESSION	TYPE	USER	KILL
CgmMMC8g6j3ujfrVYy4GytTK09zInjOO	Agent	OTOBO Admin	Kill this session

Customer Sessions

SESSION	TYPE	USER	KILL
No data found.			

8.50:

A graphical interface to OTOBO viewed in a browser (see also [Front end](#)).

SLA SLA

Transition

Transition Action

SLA

- A ticket is a collection of all communications with a customer during the course of a service request. A ticket contains articles, which are the communication received from or sent to customers, agents, external systems, etc. Tickets belong to a customer user, are assigned to agents and reside in queues.

A transport is the method chosen for communication. OTOBO supports REST and SOAP.

Activity Dialog

Documentation History

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

2.) 2020 - OTOBO Administration Manual - Rother OSS GmbH (<https://otobo.de>)

Published by: Rother OSS GmbH, (<https://otobo.de>), Oberwalting 31, 94339 Leiblfing, Germany. Authors: OTRS AG (original version), Rother OSS GmbH (<https://otobo.de>)

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GNU

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