



# OTOB Administration Manual

11.0

Rother OSS GmbH

2024 09 23



<b>1</b>	<b>Administration Area</b>	<b>3</b>
1.1	Account Management	3
1.1.1	Account	3
1.1.2	Account Groups	6
1.1.3	Account Types	10
1.1.4	Account Types	13
1.1.5	Account Types and Account Groups	18
1.1.6	Account Types	19
1.1.7	Account Types	23
1.1.8	Account Types	26
1.1.9	Account Types	28
1.1.10	State pre-selection for Templates	32
1.1.11	Account Types	32
1.1.12	Account Types	35
1.1.13	Account Types and Account Groups	39
1.1.14	Account Types	42
1.1.15	Account Types	43
1.2	Account Management	45
1.2.1	Account Types	45
1.2.2	Account Types	47
1.2.3	Account Types	54
1.2.4	Account Types	55
1.2.5	PGP	60
1.2.6	Account Types	61
1.2.7	Account Types	65
1.2.8	S/MIME	77
1.2.9	Account Types	79
1.3	Account Management	89
1.3.1	Account Types	89
1.3.2	Account Types and Account Groups	97
1.3.3	Account Types and Account Groups	99
1.3.4	Account Types	101
1.3.5	Account Types and Account Groups	103
1.3.6	Account Types	106
1.3.7	Account Types and Account Groups	117
1.3.8	Account Types and Account Groups	119

1.3.9	○○○○○ ○ ○○○ . . . . .	121
1.3.10	○ . . . . .	123
1.3.11	○○ . . . . .	125
1.3.12	○○ ○ ○ . . . . .	126
1.4	○○○○○○○ . . . . .	129
1.4.1	○○○○○○○(ACL) . . . . .	129
1.4.2	○○○○○ . . . . .	145
1.4.3	○○○○○ . . . . .	159
1.4.4	○○○○○ . . . . .	166
1.4.5	Ticket Masks . . . . .	186
1.4.6	Web○○○ . . . . .	186
1.5	○○○○○○○ . . . . .	195
1.5.1	○○○○○○○ . . . . .	195
1.5.2	○○○○○○○ . . . . .	204
1.5.3	○○ . . . . .	207
1.5.4	○○○○○ . . . . .	213
1.6	Rother OSS Services . . . . .	218
1.6.1	○○○ . . . . .	218
1.6.2	○○○○○○○○○ . . . . .	221
1.7	○○○○○ . . . . .	225
1.7.1	○○ . . . . .	225
1.7.2	FAQ ○○ . . . . .	228
1.7.3	FAQ ○○ . . . . .	231
1.7.4	Import/Export . . . . .	232
1.7.5	○○○○○○○ . . . . .	232
1.7.6	○○○○○ . . . . .	236
1.7.7	○○○○○ . . . . .	236
1.7.8	SQL○○○○○ . . . . .	240
1.7.9	○○○○○ . . . . .	242
1.7.10	○○○○○ . . . . .	248
1.7.11	○○○○○ . . . . .	249
1.7.12	Translation . . . . .	251
<b>2</b>	<b>How-Tos</b> . . . . .	<b>253</b>
<b>3</b>	○○○ . . . . .	<b>255</b>
<b>4</b>	<b>Documentation History</b> . . . . .	<b>257</b>
	○○ . . . . .	<b>259</b>



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**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](mailto:we@acme.example.com)  
 Customer: Acme Inc.  
 Comment: A great company  
[Open tickets \(customer\) \(1\)](#)

Powered by Rother OSS

1.1: 11.0

Attachment Management

Actions

[Add Attachment](#)

Filter for Attachments

Just start typing to filter...

List

NAME	FILENAME	COMMENT	VALIDITY	CHANGED	CREATED	DELETE
Product	<a href="#">troubleshooting-guide.doc</a>		valid	11/19/2020 13:29 (Europe/Berlin)	11/19/2020 13:29 (Europe/Berlin)	
Service Agreement	<a href="#">service-agreement.pdf</a>		valid	11/19/2020 13:29 (Europe/Berlin)	11/19/2020 13:29 (Europe/Berlin)	

1.2: 11.0





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)	

Figure 1.5: Resource List

Table 1.1

Table 1.1: Resource List

Table 1.1 \* Resource List

Table 1.1 \* Resource List

Table 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.

Table 1.1 Resource List

### 1.1.2 Quick and transparent service

Quick and transparent service is vital to maintaining a good working relationship with your customer. Email, fax, social media and other non-real-time communications are patient, but you want to engage your customer immediately upon receipt of a request.

OTOBO allows you to respond to a customer immediately upon receipt of a request giving the customers instantaneous feedback assuring them that their request is in processing, establishing expectation.

Automatic responses can be sent to customers based on the occurrence of certain events, such as the creation of a ticket in a specific queue, the receipt of a follow-up message in regards to a closed or rejected ticket, etc.

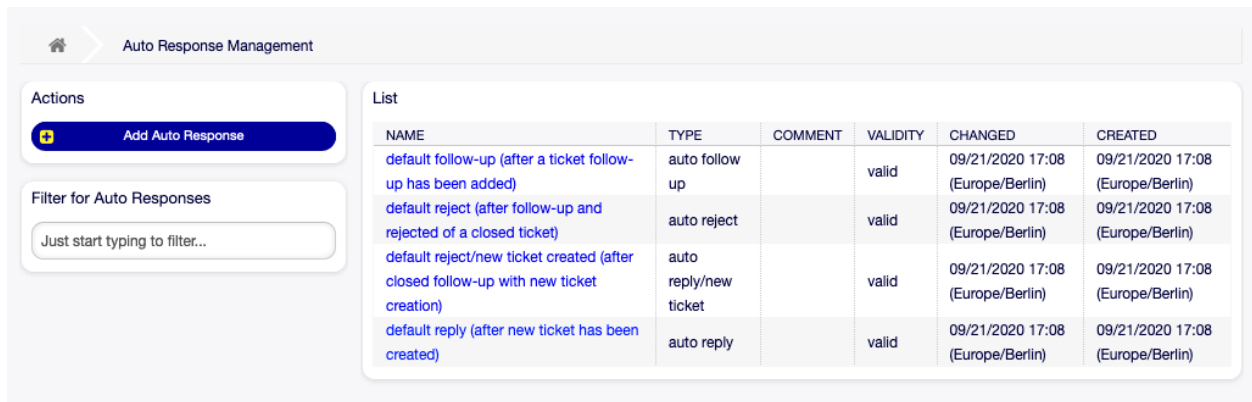
Use this screen to add automatic responses for use in queues. A fresh OTOBO installation contains some automatic responses by default. The automatic response management screen is available in the Auto Responses module of the Ticket Settings group.

Table 1.2

Table 1.2: Automatic Response Management

Table 1.2 Automatic Response Management

1. Add new automatic response
2. Edit automatic response
3. Delete automatic response



1.6: 配置画面

注: 自動応答メッセージの送信条件を設定する際に、以下の注意事項を必ずご確認ください。

注意事項

1. 自動応答メッセージの送信条件を設定する際は、必ず「有効」に設定してください。
2. 自動応答メッセージの送信条件を設定する際は、必ず「有効」に設定してください。
3. 自動応答メッセージの送信条件を設定する際は、必ず「有効」に設定してください。

注: 自動応答メッセージの送信条件を設定する際は、必ず「有効」に設定してください。

自動応答

自動応答メッセージの送信条件を設定する際は、必ず「有効」に設定してください。

注 \* 自動応答メッセージの送信条件を設定する際は、必ず「有効」に設定してください。

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自動応答メッセージの送信条件を設定する際は、必ず「有効」に設定してください。

注 \* 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-自動応答** Is triggered for any follow-up message on an existing ticket. This includes also article notes which are visible for the customer. If the **自動応答** 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 自動応答** If the **自動応答** 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-自動応答** If a ticket is deleted by the system, the customer gets this automatic response.

**auto reply-自動応答** If a new ticket is generated the customer will get this auto response. If the **自動応答** 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

Add Auto Response

\* Name:

\* Subject:

Response: **B I U S** | | | | | | | | | | | |

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

\* Type:

\* Auto response from:

\* Validity:

Comment:

**Save** or Cancel

1.7:

**Edit Auto Response**

★ Name:

★ Subject:

Response:

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

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

This is a demo text which is send to every inquiry.  
 It could contain something like:

Thanks for your email. A new ticket has been created.

You wrote:  
<OTOBO\_CUSTOMER\_EMAIL[6]>

Your email will be answered by a human ASAP

Have fun with OTOBO! :-)

Your OTOBO Team

★ Type:

★ Auto response from:

★ Validity:

Comment:

or  or [Cancel](#)

1.8:

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.

🔗/🔗 If the 🔗 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.

🔗 \* 🔗

🔗 \* 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.

🔗 🔗

🔗

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>

🔗

Ticket#2018101042000012

### 1.1.3 🔗

🔗 🔗 🔗

OTOBO provides a traffic light system based per default five levels of priorities to handle this task.

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

🔗ID🔗ID🔗1🔗

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.

🔗

---

🔗: 🔗

---

🔗

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]>
```

1.9: 1.9.1

>
Priority Management

Actions

+ Add Priority

List

NAME	VALIDITY	CHANGED	CREATED
1 very low	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
2 low	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
3 normal	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
4 high	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
5 very high	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)

Filter for Priorities

1.10: 1.10.1

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

**Add Priority**

\* Name:

\* Validity:

**Save** or **Cancel**

1.11: Add priority

1. Add priority

2. Add priority

3. Add priority

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

**Edit Priority**

\* Name:

\* Validity:

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

1.12: Edit priority

1. Add priority

2. Add priority

3. Add priority

4. Add priority

5. Add priority



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

1.13: [Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted] \* 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.

### 1.1.4 [Redacted]

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.

[Redacted]

[Redacted]

1. [Redacted]

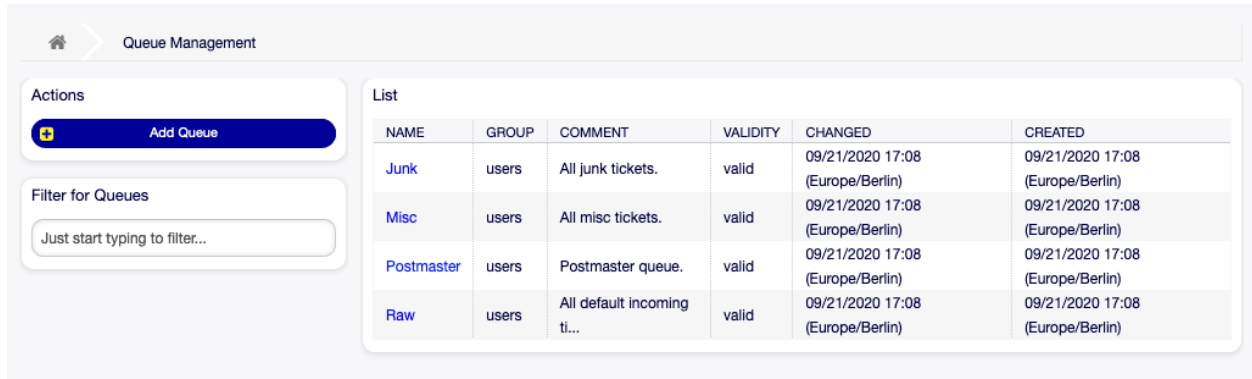


Figure 1.14: Queue Management

1. Add Queue
2. Filter for Queues

Figure 1.14: Queue Management

Queue Management

1. Add Queue
2. Filter for Queues
3. Just start typing to filter...

Figure 1.14: Queue Management

Queue Management

1. Add Queue

2. Filter for Queues

3. Just start typing to filter...

Figure 1.14: Queue Management

Queue Management

1. Add Queue
2. Filter for Queues
3. Just start typing to filter...

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:

or  or [Cancel](#)

Notice

**This queue is used in the following config settings:**

- Ticket::Frontend::CustomerTicketMessage###QueueDefault
- Ticket::Frontend::UserDefaultQueue

You can either have the affected settings updated automatically to reflect the changes you just made or do it on your own by pressing 'update manually'.



1.17: 对话框

1.17: 对话框

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

1.17 - 对话框

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

1.17 - 对话框

1.17: 对话框

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

1.17 \* 对话框

1.17 对话框

1.17 对话框

1.17 The follow up will be rejected.

1.17:

See 1.17 chapter for more information.

1.17 \* 对话框

1.17: 对话框

1.17 \* 对话框

1.17: 对话框

1.17 对话框 PGP S/MIME 对话框

OTOB \* Set the validity of this resource.

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OTOB 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.

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### 1.1.5 Manage Queue-Auto Response Relations

OTOBO gives you the power to quickly assign the appropriate automatic responses to any queue, containing pertinent service information, ensuring this information reaches your customers before expectations aren't reached.

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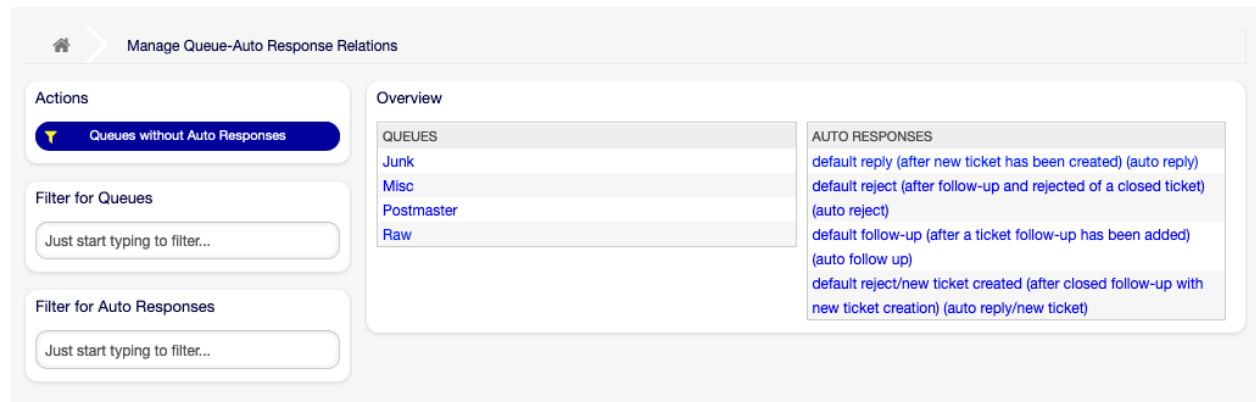


Figure 1.18: Manage Queue-Auto Response Relations

OTOBO gives you the power to quickly assign the appropriate automatic responses to any queue, containing pertinent service information, ensuring this information reaches your customers before expectations aren't reached.

OTOBO gives you the power to quickly assign the appropriate automatic responses to any queue, containing pertinent service information, ensuring this information reaches your customers before expectations aren't reached.

1. OTOB \* Set the validity of this resource.
2. OTOB \* Set the validity of this resource.
3. OTOB 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.

OTOB: 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.

OTOB: 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.

**Change Auto Response Relations for Queue Raw**

auto reply:

auto reject:

auto follow up:

auto reply/new ticket:

auto remove:

or 
  or

1.19: Auto Response Relations

1.1.5.1 Auto Reply

Auto Reply: This automatic response will be sent to users, when they send a message to the queue, and the message is not a follow-up message of a ticket.

**auto reply**- This automatic response will be sent to users, when they send a message to the queue, and the message is not a follow-up message of a ticket.

**auto reject**  This automatic response will be sent to users, when they send a message to the queue and reject is set as Follow up Option in the queue settings.

**auto follow up**  This automatic response will be sent to users, when they send a message to the queue and possible is set as Follow up Option in the queue settings.

/ This automatic response will be sent to users, when they send a message to the queue and new ticket is set as Follow up Option in the queue settings.

**auto remove**-

---

: Auto reply, auto reject and auto reply/new ticket mutually cancel each other based on the  settings. Only one will take effect per queue.

---

## 1.1.6 Salutations

Salutations: This screen is used to manage the salutations for the system.

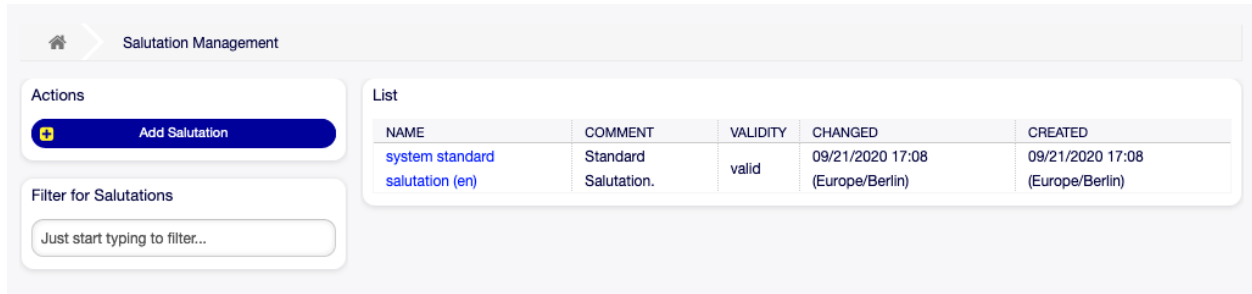
OTOBO provides you with the tools needed to create a standardized communication form for any one of your queues. As defined in the Queue Settings: , , and  are combined to ensure a well formed standardized email communication.

Salutations: This screen is used to manage the salutations for the system.

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

Salutations

Salutations



1.20: Salutations

1. Salutations are used to address customers in messages.
2. Salutations are created in the Salutation Management interface.
3. Salutations can be used in messages.

1. Salutations are used to address customers in messages.

2. Salutations are created in the Salutation Management interface.

1. Salutations are created in the Salutation Management interface.
2. Salutations are created in the Salutation Management interface.
3. Salutations can be used in messages.

2. Salutations are created in the Salutation Management interface.

3. Salutations can be used in messages.

3. Salutations can be used in messages.

Salutations are used to address customers in messages.

Salutations are created in the Salutation Management interface.

Salutations can be used in messages.

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.

Salutations are used to address customers in messages.

Salutations

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\_CUSTOMER\_DATA\_UserLastname> expands to the customer's last name to be included in something like the following.







**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.
```

1.23: Example salutation

```
Dear <OTOBO_CUSTOMER_DATA_UserFirstname> <OTOBO_CUSTOMER_DATA_UserLastname>,
```

XXXXXXXXXXXX

```
Dear Lisa Wagner,
```

**1.1.7 Service Level Agreements**

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.

⚠:

To use this feature, `Ticket::Service` must be activated in the `Settings` 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.

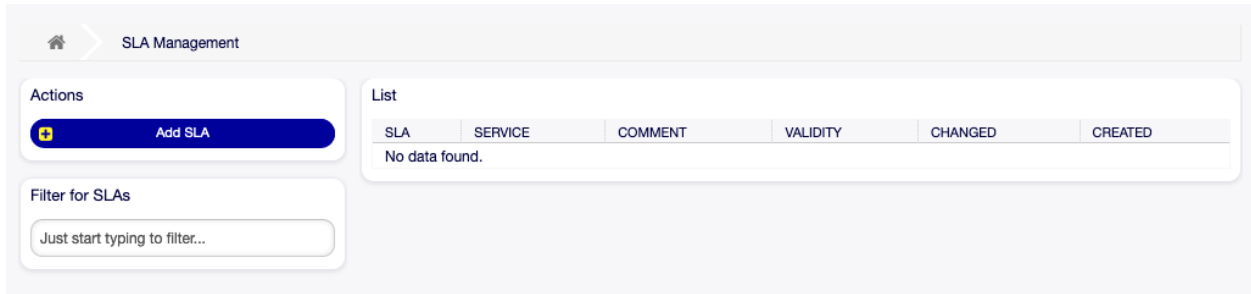


Figure 1.24: SLA Management

Procedure

1. Click on the 'Add SLA' button.

2. Enter the following information:

1. Enter the SLA name.
2. Select the service.
3. Select the calendar.

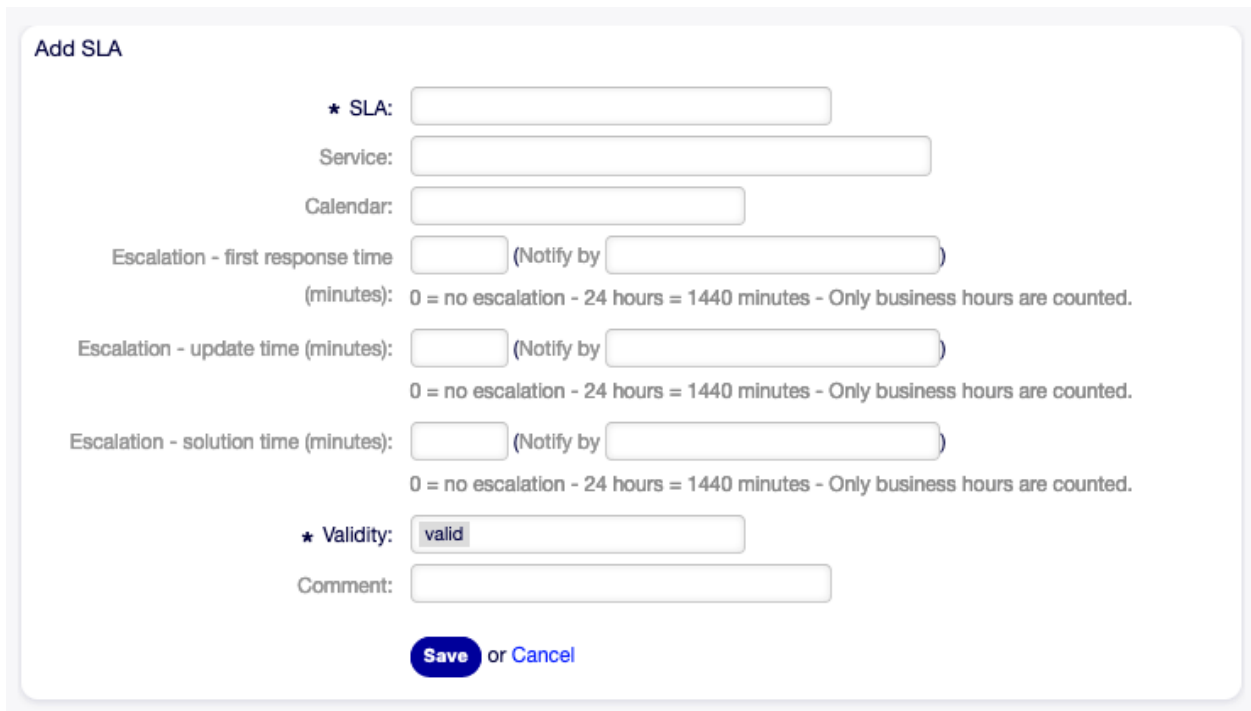


Figure 1.25: Add SLA

3. Click on the 'Save' button.

4. The SLA is added.





3. Add Service

The screenshot shows a web form titled "Add Service". It contains four input fields:
 

- "\* Service:" with an empty text box.
- "Sub-service of:" with a disabled greyed-out text box.
- "\* Validity:" with a dropdown menu showing "valid".
- "Comment:" with an empty text box.

 At the bottom of the form, there is a blue "Save" button followed by the text "or Cancel".

Figure 1.28: Add Service

Figure 1.28: Add Service

Procedure

1. Click the Add Service button.
2. Add service.
3. Click the Save button.

This screenshot shows the "Add Service" form after data has been entered:
 

- "\* Service:" is filled with "Test service".
- "Sub-service of:" remains a disabled greyed-out text box.
- "\* Validity:" is still set to "valid".
- "Comment:" is filled with "This is a test service."

 The "Save" button and "or Cancel" text are still present at the bottom.

Figure 1.29: Add Service

Figure 1.29: Add Service

Figure 1.29: Add Service

Notes

Figure 1.29: Add Service











\* The service name must be unique.








Add Signature

\* Name:

\* Signature:   
**B** *I* U ~~S~~ |   |   |   |   | 

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

\* Validity:

Comment:

**Save** or Cancel

1.31: Add Signature

**Edit Signature**

\* Name:

\* Signature:

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

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

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

1.32: Edit Signature

OTOBOTAGS: [REDACTED]

OTOBOTAGS: [REDACTED]

OTOBOTAGS

[REDACTED]

OTOBOTAGS \* [REDACTED]

OTOBOTAGS \* [REDACTED]

OTOBOTAGS \* 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.

OTOBOTAGS [REDACTED]

OTOBOTAGS

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 signature:**

Your OTOBO-Team

<OTOBO\_CURRENT\_UserFirstname> <OTOBO\_CURRENT\_UserLastname>

--

1.33: [REDACTED]

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.



State Management

Actions

**Add State**

Filter for States

Just start typing to filter...

Hint

Attention: Please also update the states in SysConfig where needed.  
See also: <https://doc.otobo.org/doc>

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	pending	Ticket is pending...	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
reminder	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)

1.34: State Management

3. Add State

Add State

\* Name:

\* State type:

\* Validity:

Comment:

**Save** or Cancel

1.35: Add State

1.36: State Management

1.37: State Management

1. State Management
2. State Management
3. State Management

1.38: State Management

1.39: State Management

Edit State

\* Name:

\* State type:

\* Validity:

Comment:

or  or [Cancel](#)

1.36: Edit State

Notice

**This state is used in the following config settings:**

- PostmasterFollowUpState
- PostmasterFollowUpStateClosed
- Ticket::Frontend::AgentTicketBulk###StateDefault
- Ticket::Frontend::AgentTicketCompose###StateDefault
- Ticket::Frontend::AgentTicketEmail###StateDefault
- Ticket::Frontend::AgentTicketEmailOutbound###StateDefault
- Ticket::Frontend::AgentTicketFreeText###StateDefault
- Ticket::Frontend::AgentTicketNote###StateDefault

1.37: Notice

ACL: [redacted]  
[redacted]  
[redacted]

ACL: [redacted]

[redacted]

[redacted]

[redacted] \* [redacted]

[redacted] \* [redacted]

- closed-[redacted]
- merged-[redacted]
- new-[redacted]
- open-[redacted]
- [redacted]
- [redacted]
- removed-[redacted]

[redacted]: [redacted]

[redacted] \* 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.

[redacted]

[redacted]

[redacted]

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

### 1.1.12 [redacted]

[redacted]

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

**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)	

**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.

1.38: Template Management

1.38

1.38: Template Management

1.38

1. Add Template
2. Filter for Templates
3. Hint

1.38

1. Add Template
2. Filter for Templates
3. Hint

1.38

1. Add Template
2. Hint

1.38: Template Management

1.38

1.38: Template Management

1.38 \* Template Management

1.38

1.38

1.38 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 | | | | Source |

Attachments:

\* Validity:

Comment:

**Save** or Cancel

1.39: Add Template

**Edit Template**

\* Type:

\* Name:

Template:

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

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

Attachments:

\* Validity:

Comment:

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

1.40: Edit Template

**List**

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

1.41: List



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>).

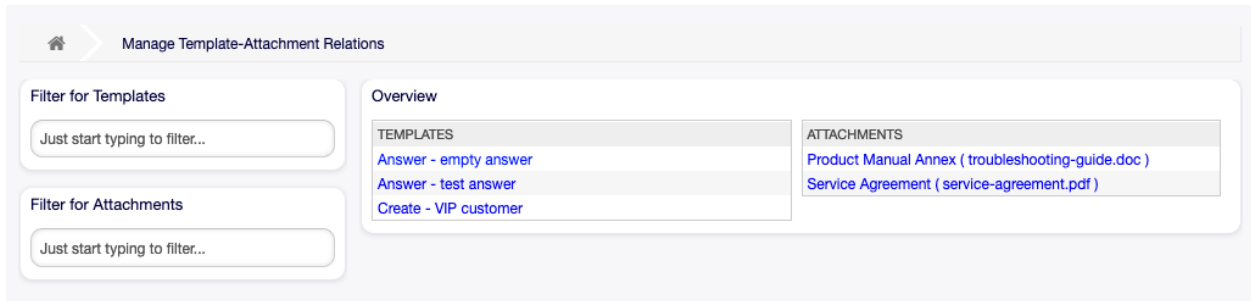
**<OTOBO\_CONFIG\_\*>**

Config options (e. g. <OTOBO\_CONFIG\_HttpType>).

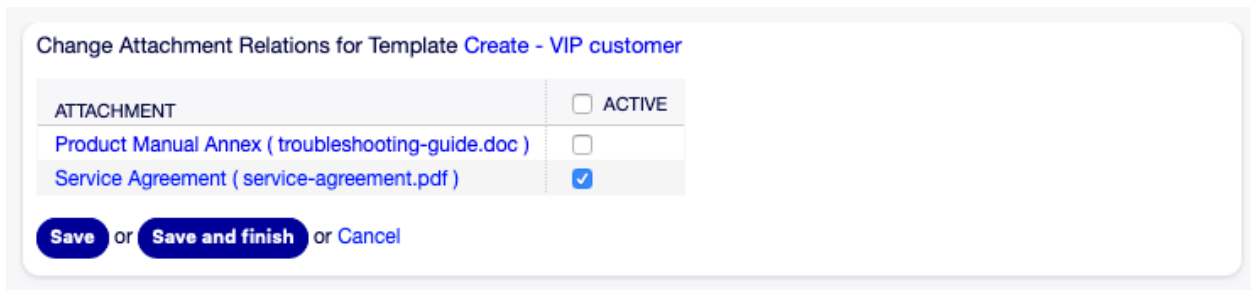
**Note:** Create type templates only supports this smart tags: <OTOBO\_CURRENT\_\*> and <OTOBO\_CONFIG\_\*>

Example template:

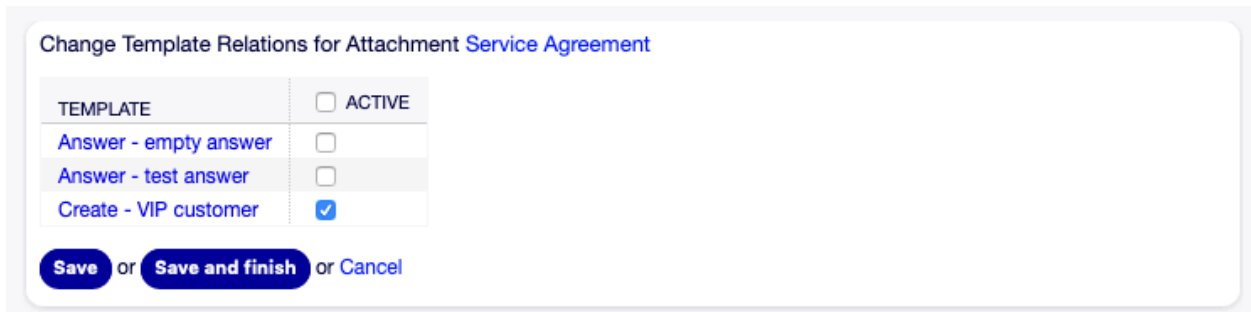
```
The current ticket state is: "<OTOBO_TICKET_State>"
Your email address is: "<OTOBO_CUSTOMER_UserEmail>"
```



1.43:



1.44:



1.45:

OT: [redacted]

[redacted]

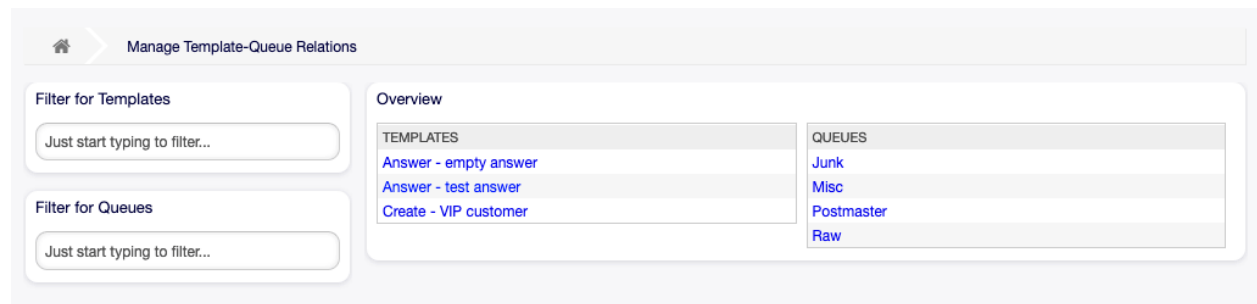
OT: [redacted]

### 1.1.14 [redacted]

[redacted]

OTOBO can quickly aid you in ensuring that all of your teams have the correct templates available for use by assignment based on the queue.

[redacted]

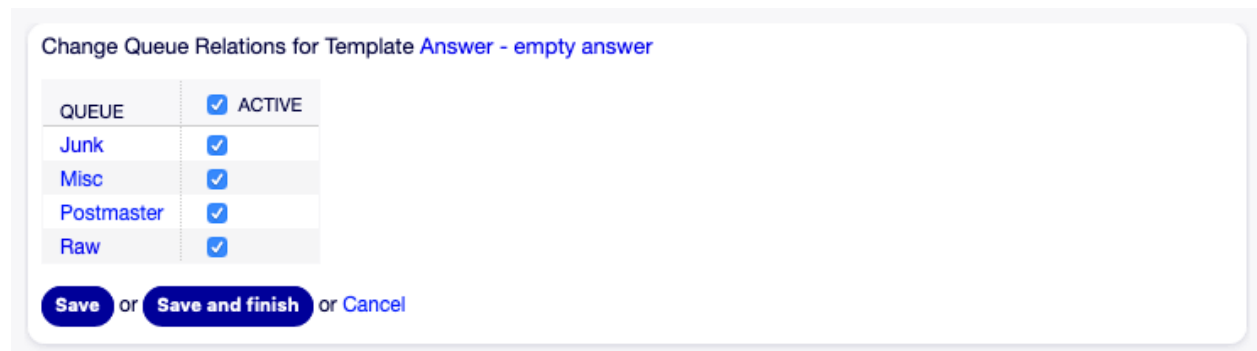


1.46: [redacted]

[redacted]

[redacted]

1. [redacted]
2. [redacted]
3. [redacted]



1.47: [redacted]

[redacted]

1. [Redacted]
2. [Redacted]
3. [Redacted]

**Change Template Relations for Queue Misc**

TEMPLATE	ACTIVE
Answer - empty answer	<input checked="" type="checkbox"/>
Answer - test answer	<input type="checkbox"/>
Create - VIP customer	<input type="checkbox"/>

or 
  or

148: [Redacted]

[Redacted]

[Redacted]

[Redacted]

### 1.1.15 [Redacted]

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.

**Type Management**

**Actions**

**Filter for Types**

Just start typing to filter...

**List**

NAME	VALIDITY	CHANGED	CREATED
Unclassified	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)

149: [Redacted]

⚠: Ticket :: Type must first be activated via [Admin](#) 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.

Please activate Type first! →

1.50: Add Type

Admin

Configuration

1. Click on the **Admin** link
2. Click on **Configuration**
3. Click on **Types**

**Add Type**

\* Name:

\* Validity:

**Save** or **Cancel**

1.51: Edit Type

⚠: Ticket :: Type must first be activated via [Admin](#) 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.

Admin

1. Click on the **Admin** link
2. Click on **Configuration**
3. Click on **Types**

**Edit Type**

\* Name:

\* Validity:

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

1.52: Edit Type

⚠: Ticket :: Type must first be activated via [Admin](#) 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.







OTOB \* OTOBO

OTOB \* OTOBO

### 1.2.2 OTOBO

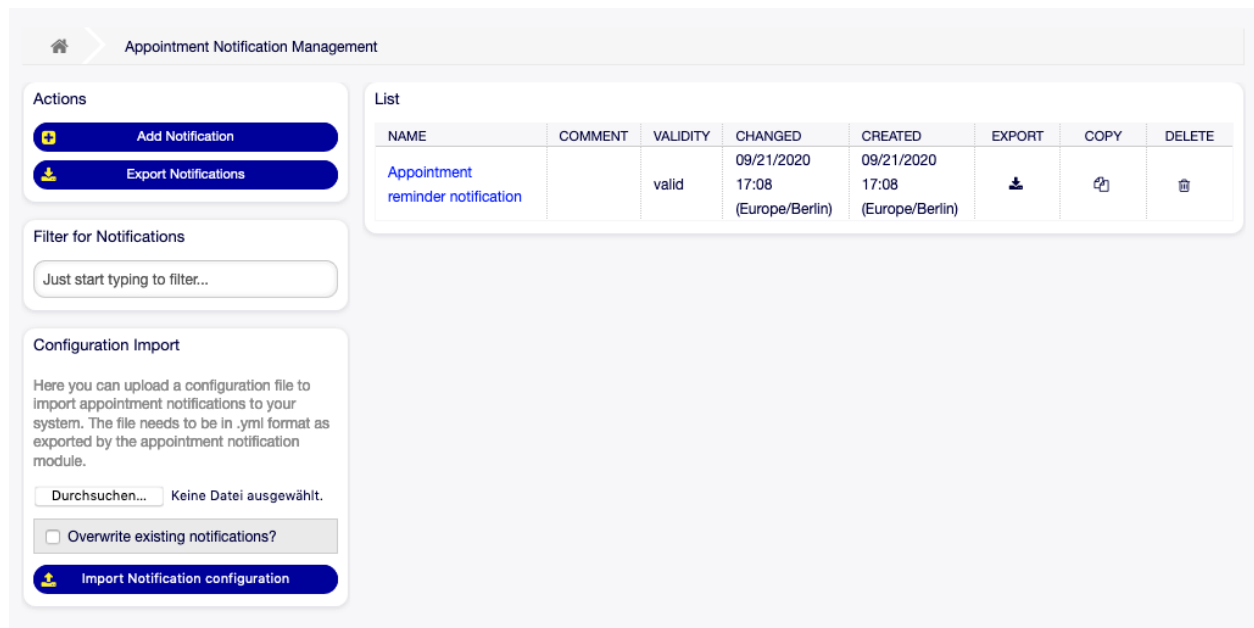
OTOB OTOBO

- OTOBO
- OTOBO
- OTOBO

OTOB OTOBO

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 OTOBO 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.



1.54: OTOBO

OTOB

OTOB

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

1. Appointment Notification Settings

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

2. Appointment Notification Settings

1. Appointment Notification Settings
2. Appointment Notification Settings

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)			

1.55: Appointment Notification Settings

1. Appointment Notification Settings

1. Appointment Notification Settings
2. Appointment Notification Settings Export\_Notification.yml

2. Appointment Notification Settings

1. Appointment Notification Settings
2. Appointment Notification Settings .yml
3. Appointment Notification Settings
4. Appointment Notification Settings

Appointment Notification Settings

Appointment Notification Settings

Appointment Notification Settings

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

Appointment Notification Settings

\* Appointment Notification Settings

Appointment Notification Settings

Appointment Notification Settings

Appointment Notification Settings

Appointment Notification Settings

Appointment Notification Settings

**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:

1.56: Add Notification - 11.0

**Appointment notifications**

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

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

1.57: Appointment notifications - 11.0

Appointment notifications are used to send notifications to agents about their appointments.

★ 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.

1.58

▼ **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.

1.58: Events - 11.0

Event \* AppointmentNotification

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** [event]

**CalendarUpdate** [event]

[event]

▼ Appointment Filter

Calendar: [input]  
Title: [input]  
Location: [input]  
Resource: [input]

1.59: Appointment Filter

[event]

[event]

[event]

[event]

[event]

[event]

▼ Recipients

Send to: [dropdown: All agents with (at least) read permission for the appointment (cal... x)]  
Send to these agents: [input]  
Send to all group members (agents only): [input]  
Send to all role members: [input]  
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.

1.60: Recipients

[event]

- [event]
- [event]



Web

**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.

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

PGP S/MIME

PGP PGP

PGP PGP

PGP PGP

SMIME S/MIME

SMIME S/MIME

SMIME S/MIME

PGP S/MIME

/

/

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.

\*

\*

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.







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.

▼ 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>
```

1.63: Tag Reference

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]>



Title: Daily meeting in the...

### 1.2.3



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.

Figure 1.64: Communication Log Overview

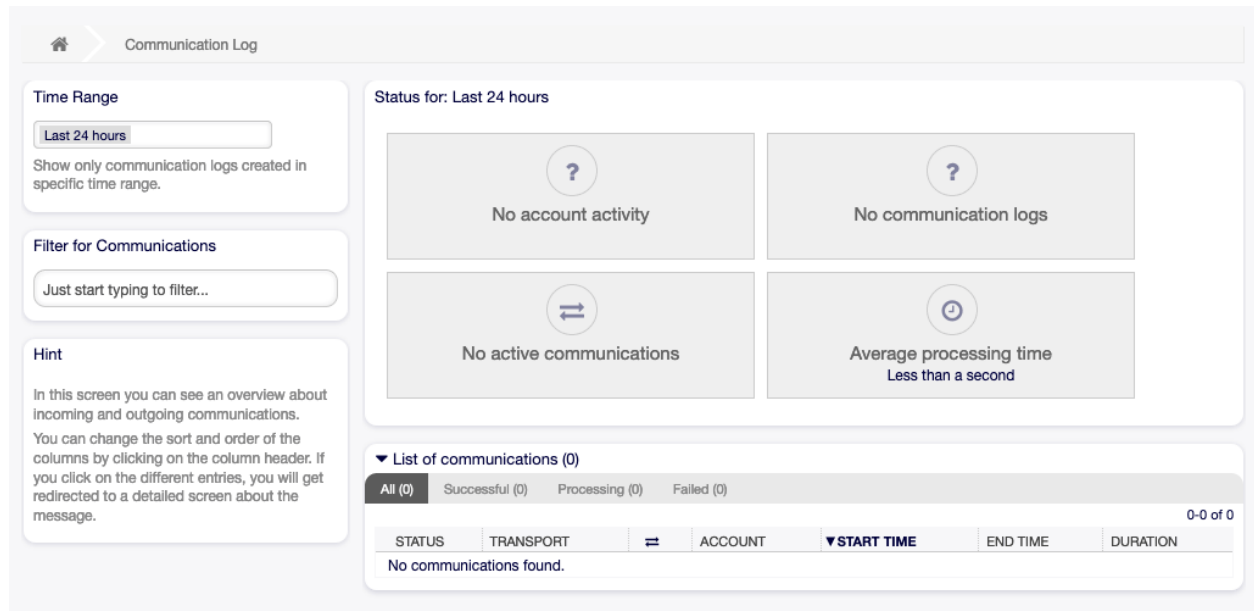


Figure 1.64: Communication Log Overview

Figure 1.65: Communication Log Detail

Figure 1.65: Communication Log Detail

Figure 1.65: Communication Log Detail

Figure 1.65: Communication Log Detail

Figure 1.65: Communication Log Detail

Figure 1.65: Communication Log Detail

Figure 1.65: Communication Log Detail

Figure 1.65: Communication Log Detail

Figure 1.65: Communication Log Detail

Figure 1.65: Communication Log Detail

Figure 1.65: Communication Log Detail

Figure 1.65: Communication Log Detail


Error Message

### 1.2.4 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


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)

1.65: [icon]

▼ 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)

1.66: Communication Log

hr@example.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.

Communication Log

Communication Log

1. Communication Log
2. Communication Log
3. Communication Log

✘: Communication Log

✘: Once an email address is added and set to valid, OTOBO cannot send an email to this address.

System Email Addresses Management

Actions

[Add System Address](#)

Filter for System Addresses

Just start typing to filter...

Hint

All incoming email with this address in To or Cc will be dispatched to the selected queue.

List

EMAIL ADDRESS	DISPLAY NAME	QUEUE	VALIDITY	CHANGED	CREATED
<a href="#">otobo@localhost</a>	OTOBO System	Postmaster	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)

1.67: Screenshot of the System Email Addresses Management interface showing a list of addresses.

Add System Email Address

\* Email address:

\* Display name:

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

\* Queue:

\* Validity:

Comment:

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

1.68: Screenshot of the Add System Email Address form.



**From:** OTOBO Feedback <marketing@otobo.com>  
**To:** Your OTOBO System <otobo@localhost>  
**Subject:** Welcome to OTOBO!

1.71: 1.71

\* 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.

1.71: 1.71

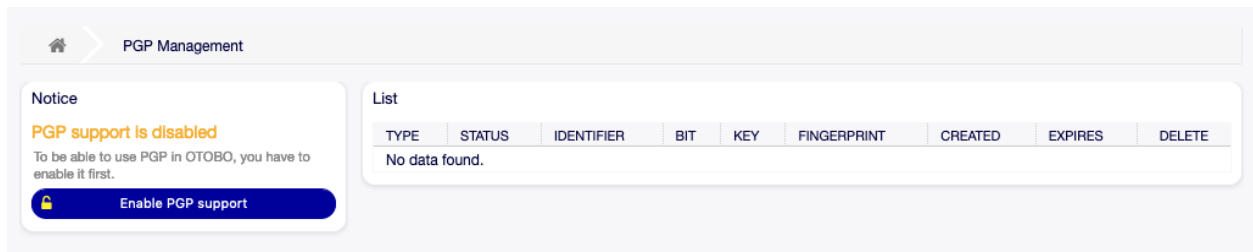
1.71: 1.71

### 1.2.5 PGP

GDPR(“”)GDPR  
OTOBO empowers you to encrypt communications where needed by means of S/MIME or PGP.

1.71: 1.71

PGPPGP 1.71: PGP



1.72: PGP

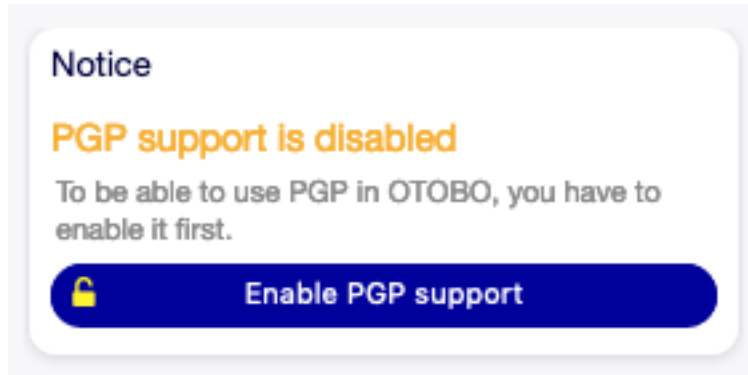
### PGP

To be able to use PGP keys in OTOBO, you have to activate its setting first.

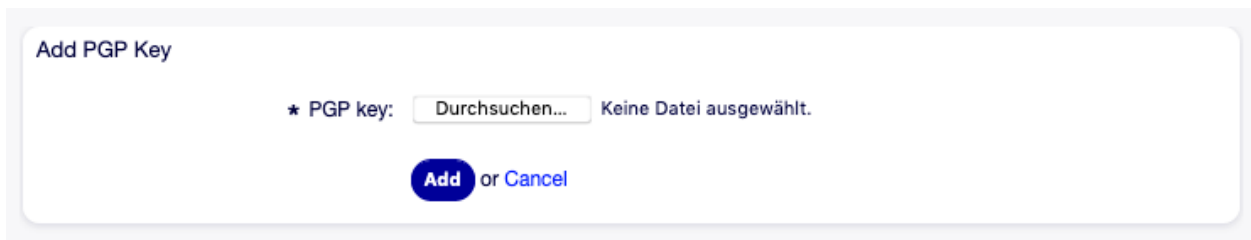
PGP

- PGP
- \*...\*
- PGP
- \*...\*





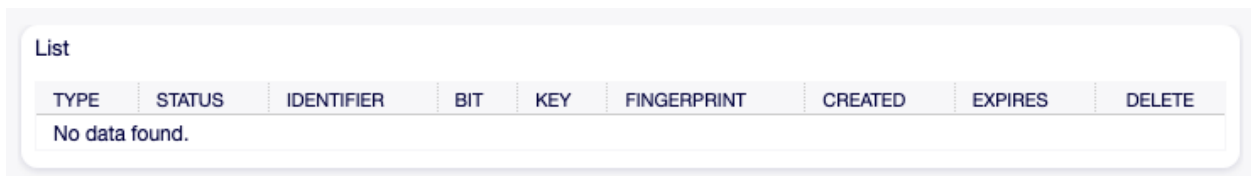
1.73: PGP



1.74: PGP

PGP

1. PGP
2. [ ] [ ] [ ]



1.75: PGP

---

PGP

---

**PGP**

Core → Crypt → PGP

**1.2.6**

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-







\$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 1.81: Example of the 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.

### 1.2.7 Example

Example

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

Example

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.

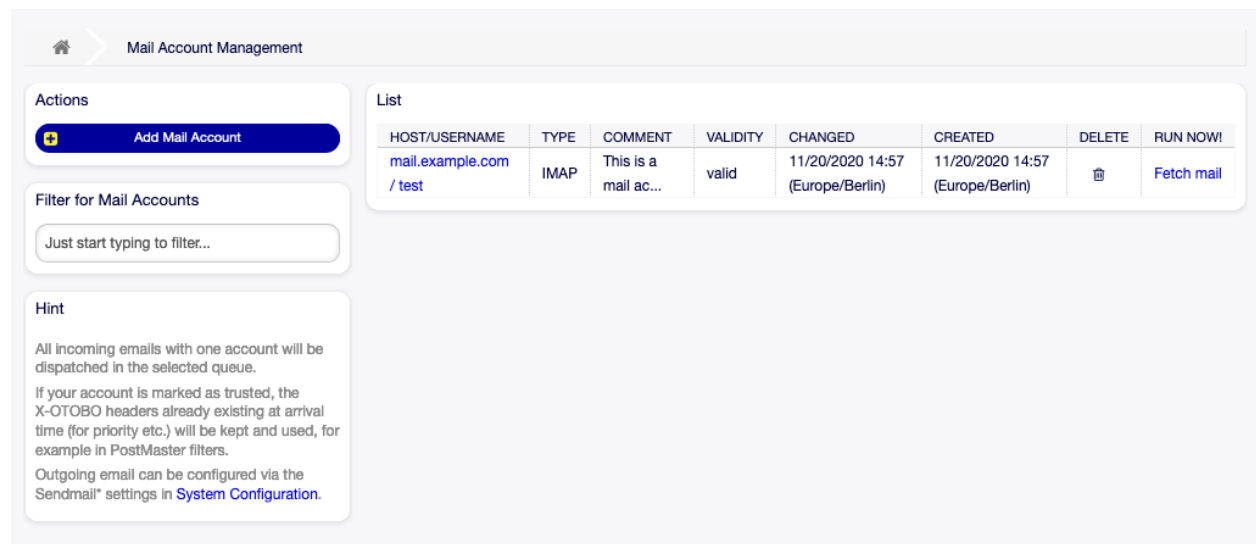


Figure 1.82: Mail Account Management

Figure 1.82: 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.

### Installation

#### Prerequisites

1. A system with a minimum of 1GB of RAM
2. A system with a minimum of 1GB of free disk space
3. A system with a minimum of 1GB of free swap space

#### Installation Steps

1. Download the OTOBO source code
2. Extract the source code
3. Run the installation script

#### Configuration

1. Edit the `otobo.ini` file
2. Run the `otobo` command

Figure 1.83: Mail Account Management

### 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

1.83: 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

1.84: Edit Mail Account

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

1.85:

\*

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

\*

\*

\*

**IMAP**

**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.

The X-OTOBO headers are explained in the filter conditions of .

**Dispatching** \*

**To:()** **To:()**   
**To:()** **To:()**   
 Raw

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

\* 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.



## POP3 and IMAP OAuth2 Authentication

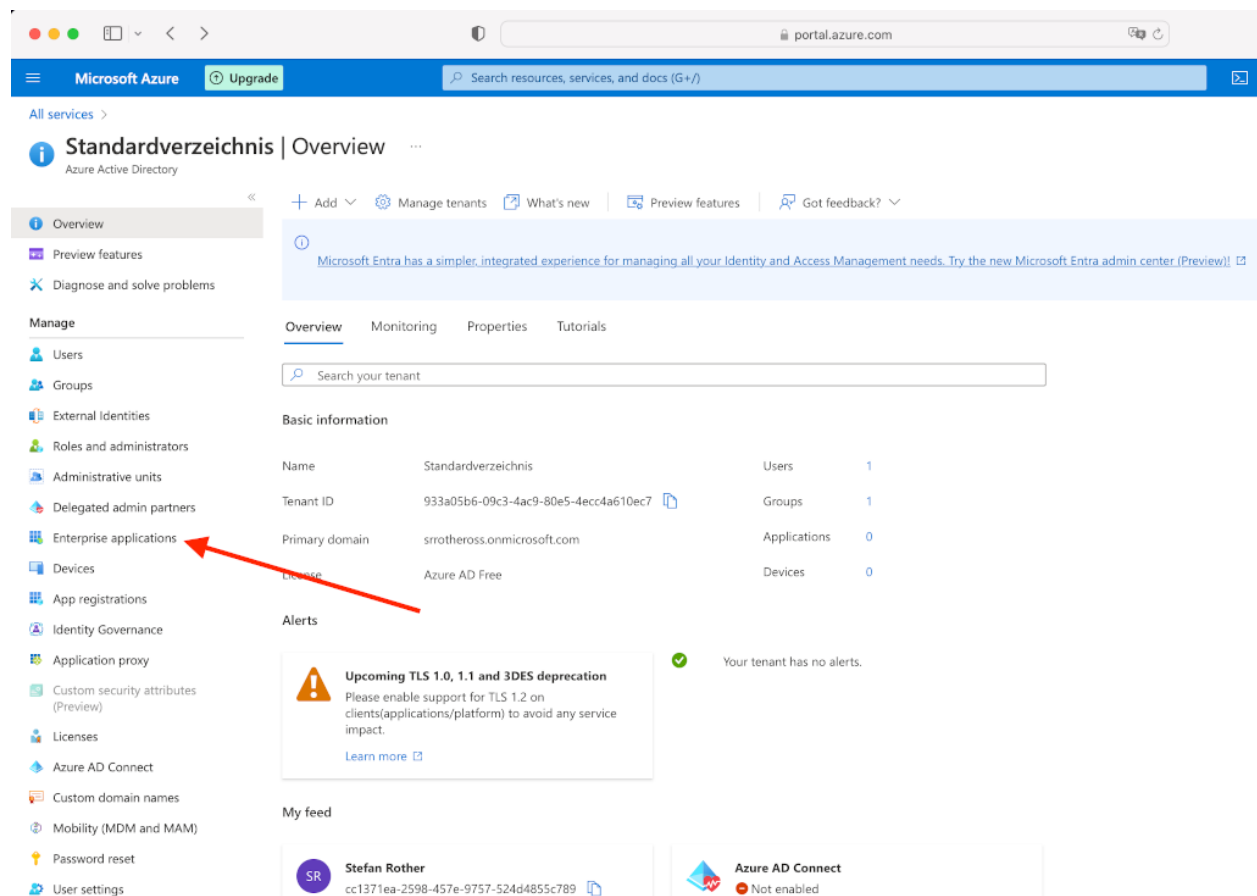
Authentication via OAuth2 / OpenID Connect is possible by using an additional package in OTOBO. Please install the package **MailAccount-OAuth2** in the OTOBO package management.

🔧: After installing the package sometimes a restart of the OTOBO webserver or container is needed.

## Azure Configuration

Go to <https://portal.azure.com>

In the next step switch to “Azure Active Directory“ and add a new “Enterprise Application“:



## Create your own application

### Assign a name to the app

The screenshot shows the Microsoft Azure portal interface for 'Enterprise applications | All applications'. The page includes a navigation pane on the left with sections for Overview, Manage, Security, Activity, and Troubleshooting + Support. The main content area features a 'New application' button, a search bar, and a table with columns for Name, Object ID, Application ID, Homepage URL, and Created on. The table currently displays '0 applications found' and 'No results'. A red arrow points to the 'New application' button.

Microsoft Azure Upgrade Search resources, services, and docs (G+)

All services > Standardverzeichnis | Enterprise applications > Enterprise applications

### Enterprise applications | All applications

Standardverzeichnis - Azure Active Directory

« + New application Refresh Download (Export) Preview info Columns Preview features Got feedback?

**Overview**

- Overview
- Diagnose and solve problems

**Manage**

- All applications
- Application proxy
- User settings
- Collections

**Security**

- Conditional Access
- Consent and permissions

**Activity**

- Sign-in logs
- Usage & insights
- Audit logs
- Provisioning logs
- Access reviews
- Admin consent requests
- Bulk operation results

**Troubleshooting + Support**

- Virtual assistant (Preview)

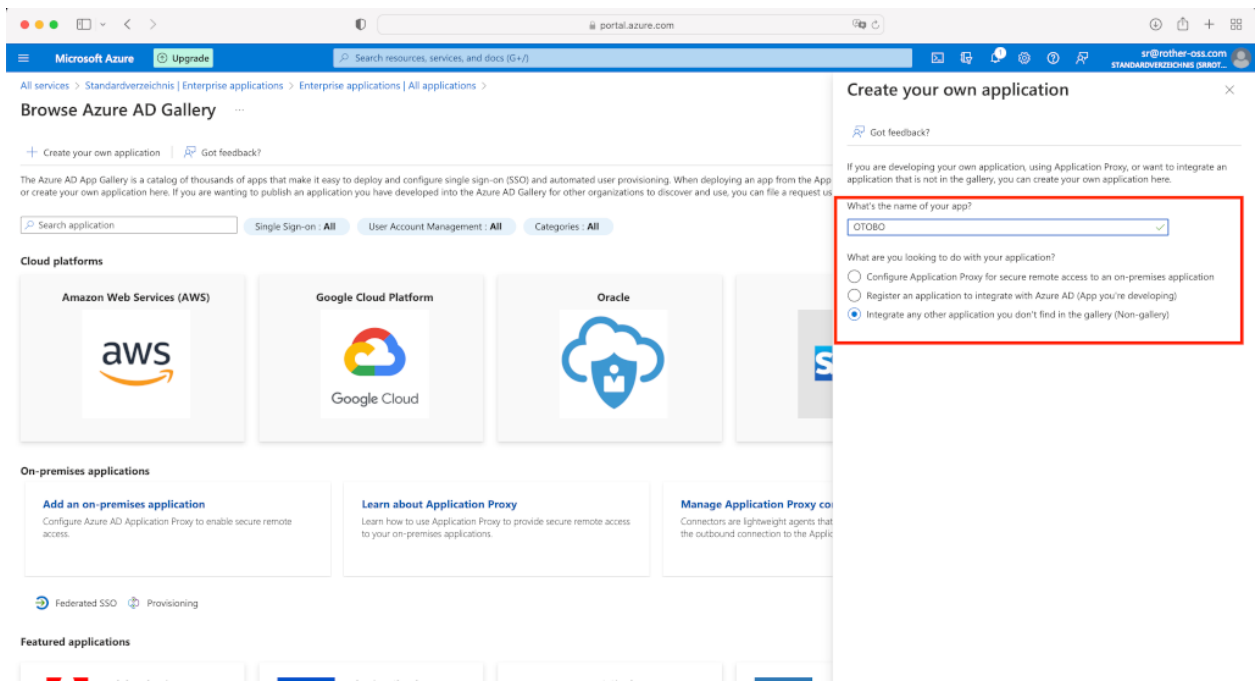
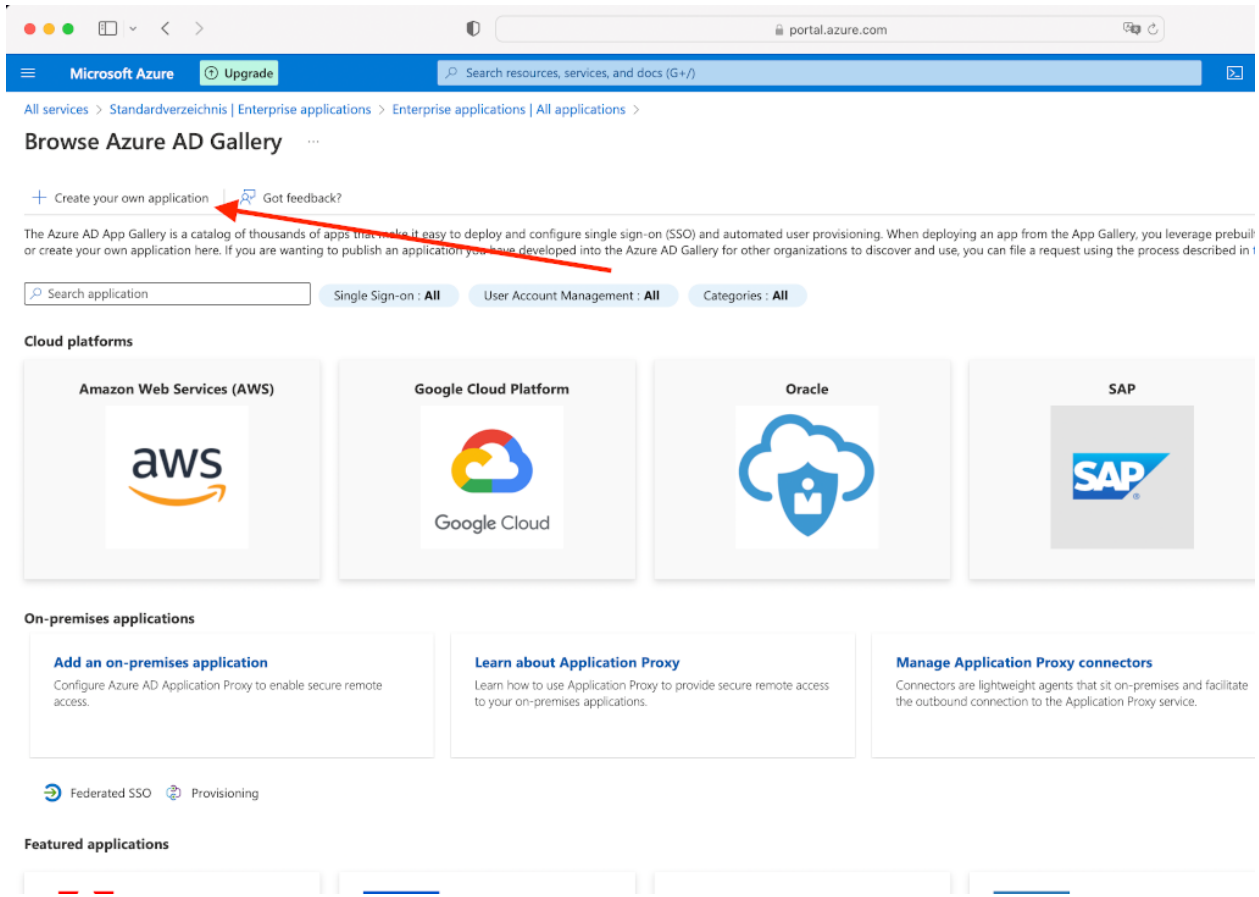
View, filter, and search applications in your organization that are set up to use your Azure AD tenant as their Identity Provider.

The list of applications that are maintained by your organization are in [application registrations](#).

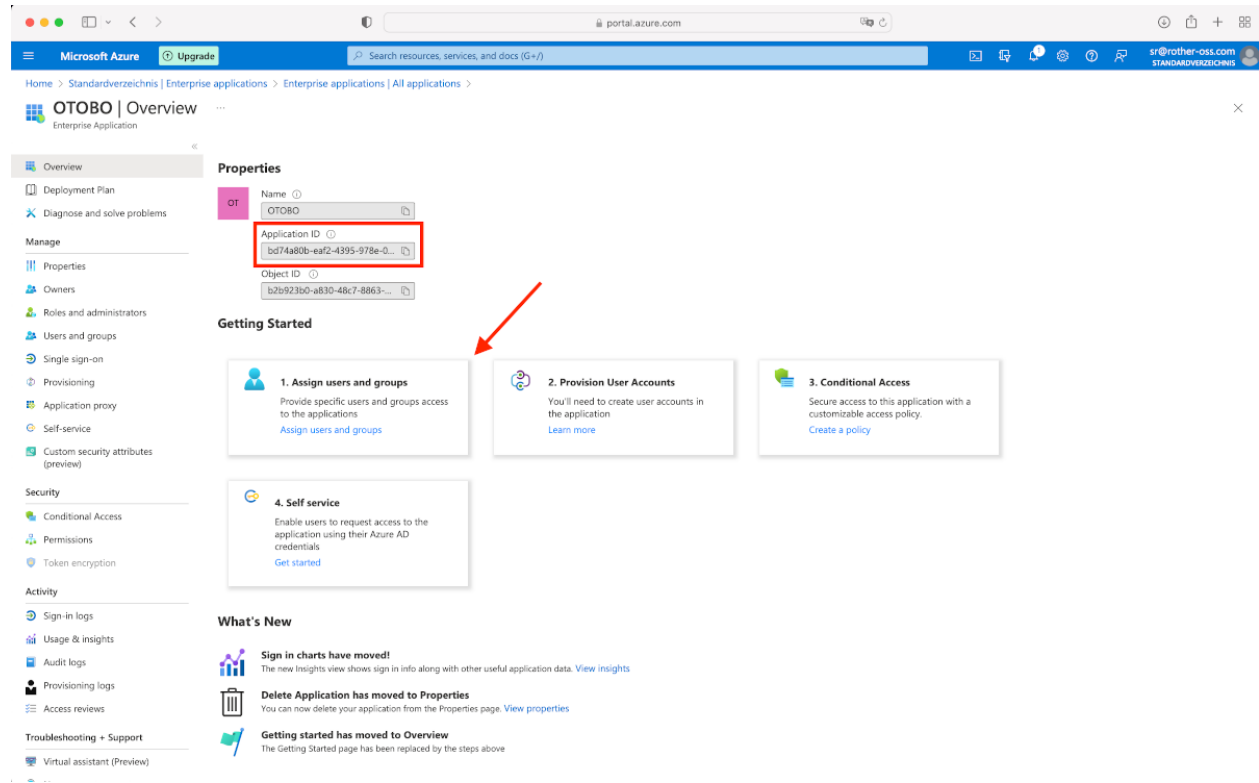
Search by application name or object ID Application type == Enterprise Applications Application ID starts with Add filters

0 applications found

Name	Object ID	Application ID	Homepage URL	Created on
No results				



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>

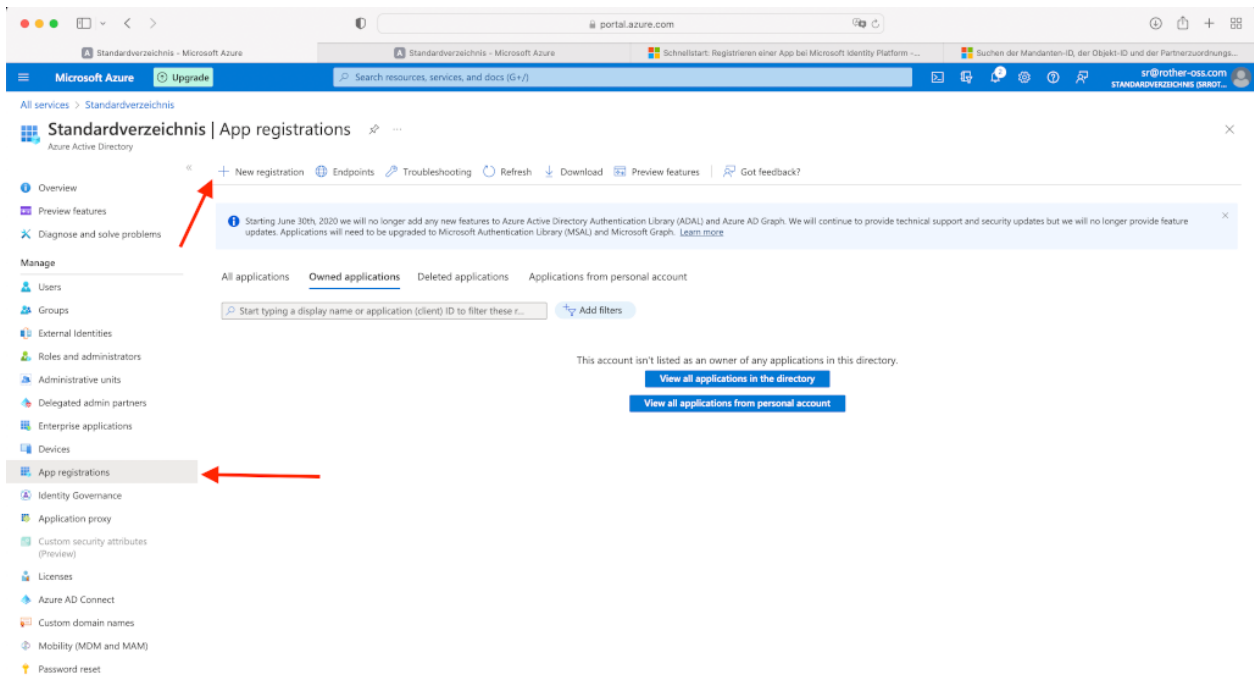
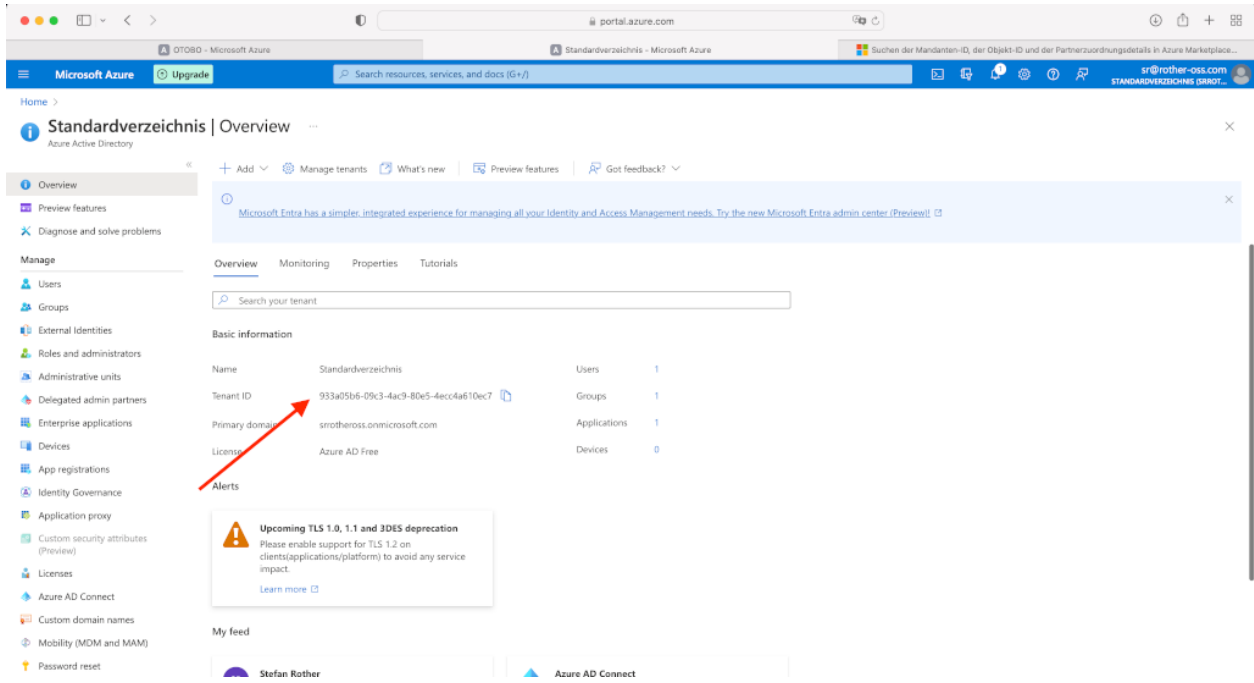
Switch to “API permissions“ and add “IMAP.AccessAsUser.All“ and “POP.AccessAsUser.All“

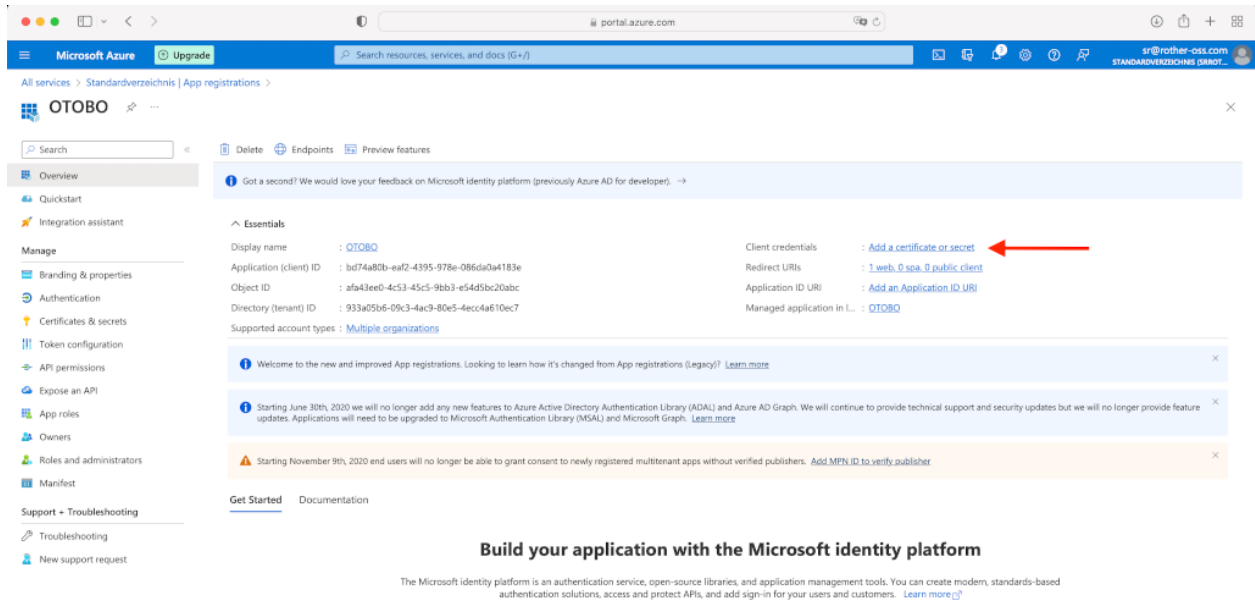
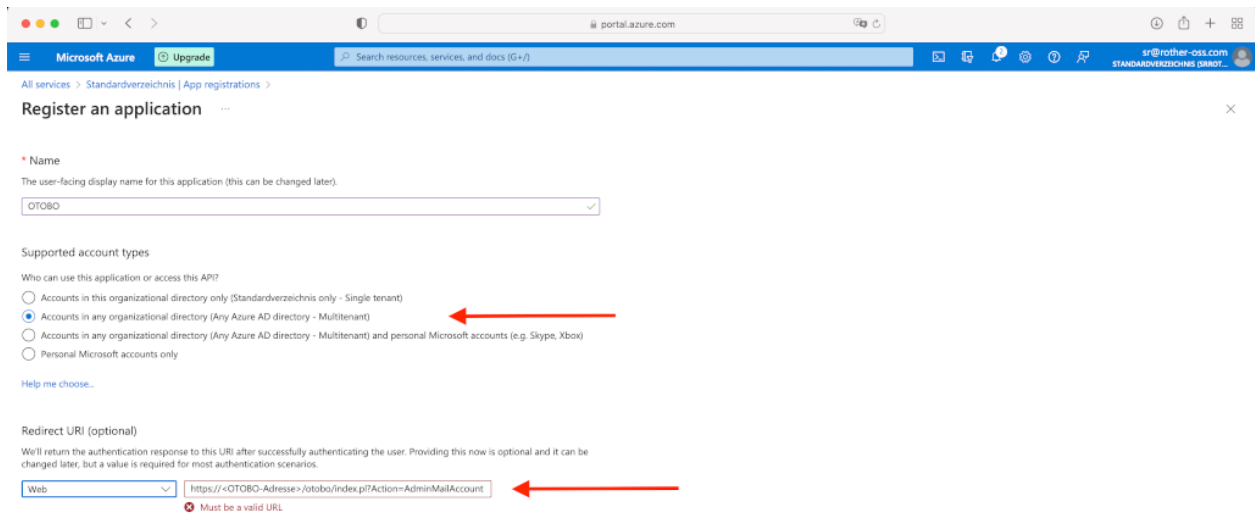
The Azure configuration is now complete. Please check whether port 143 and 993 are enabled.

### OTOBO OAuth2 Configuration

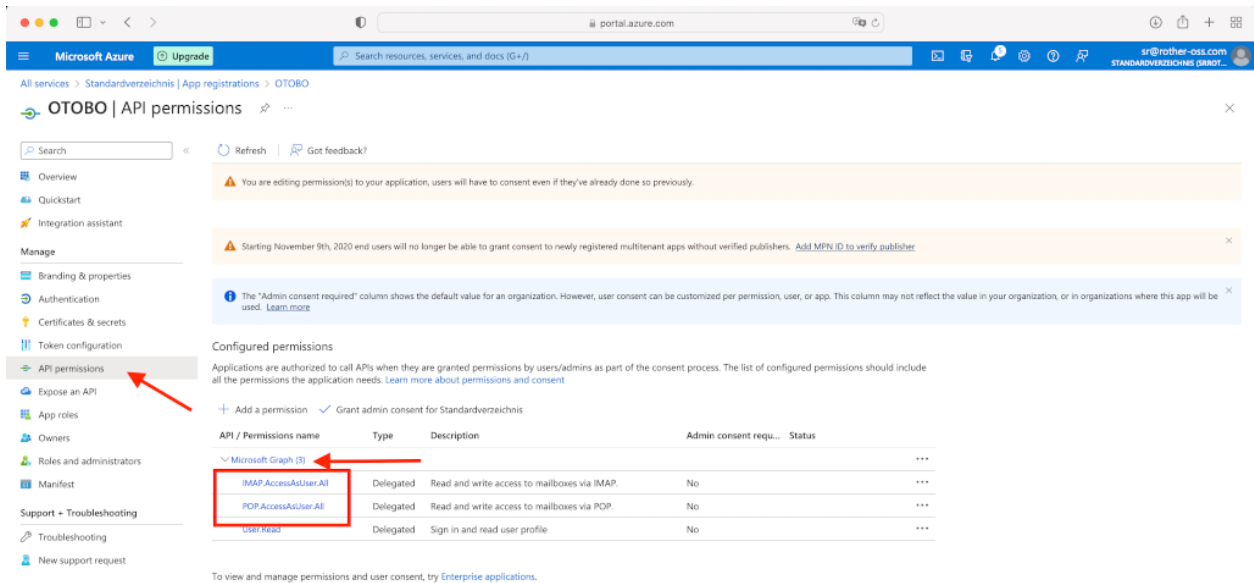
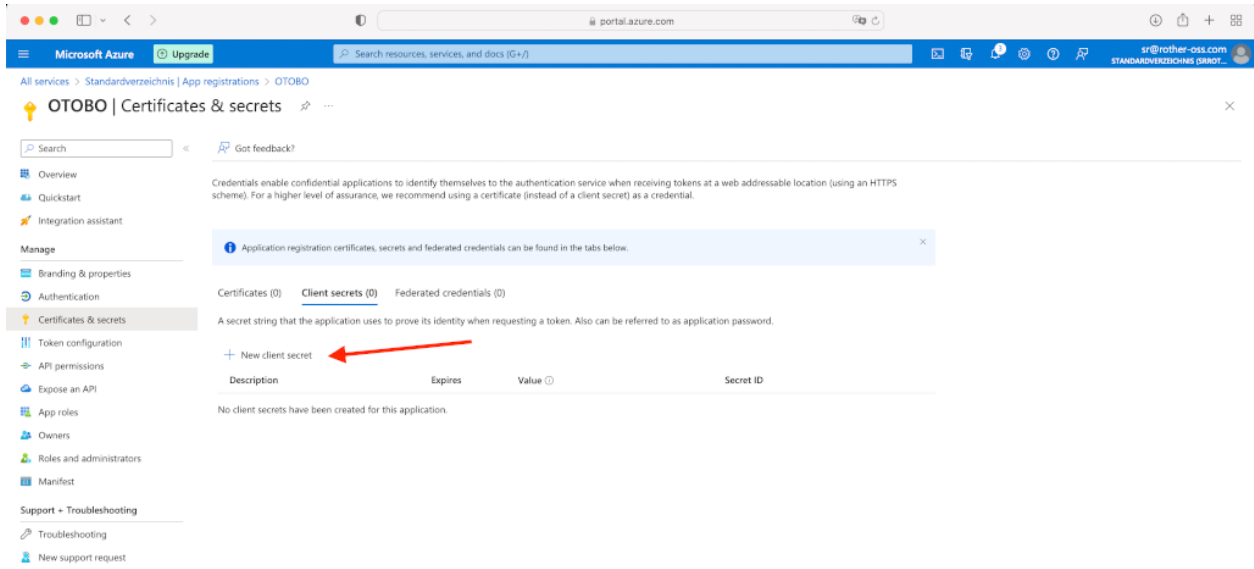
Please switch to the OTOBO Admin Interface -> System Configuration now and enable the profile / option OAuth2::MailAccount::Profiles###Custom1.

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

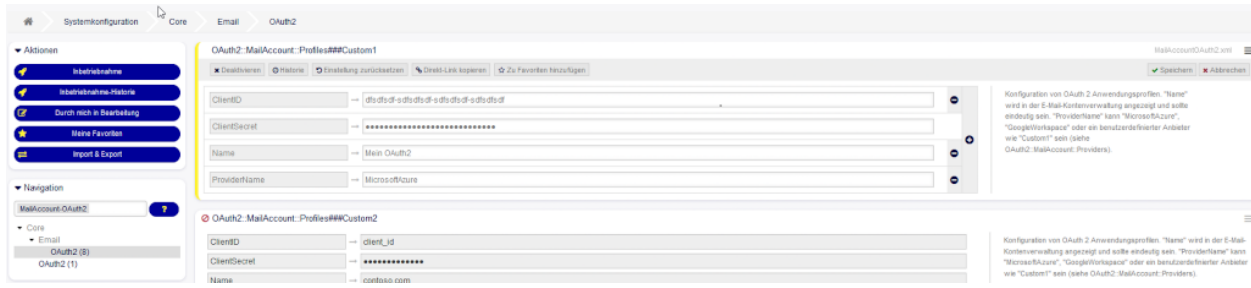




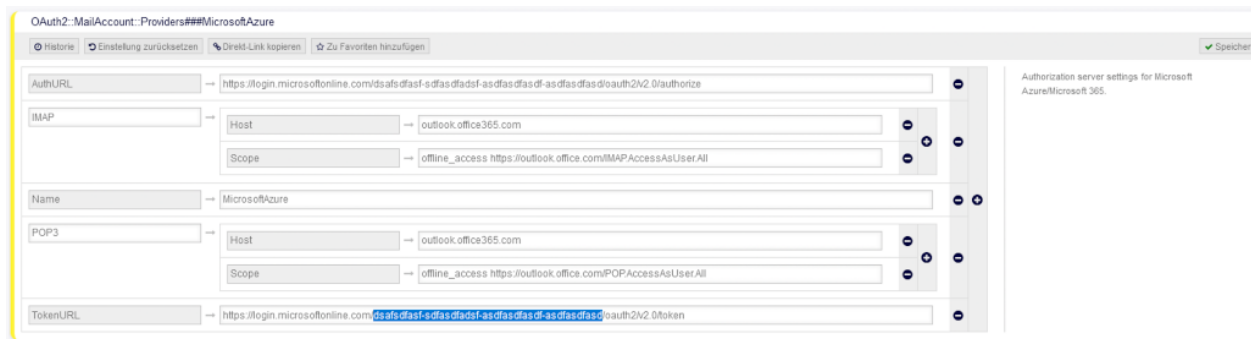
1.186: Please add a new client secret and note the value (not the secret id) as we need it later. It will only appear during the creation and you will not be able to see it afterwards anymore. Apparently Microsoft only allows a time of validity for two years max.



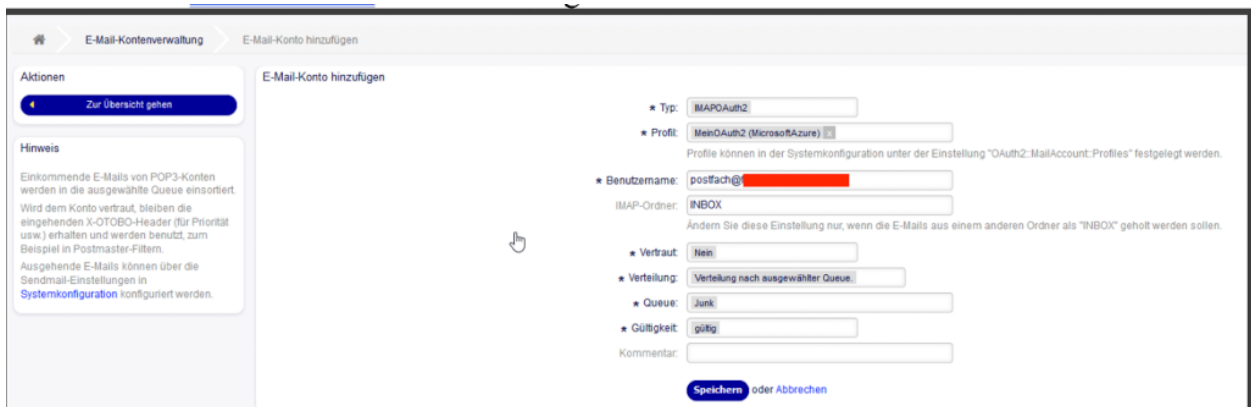
1.87: Please click on “Add permission” and choose Microsoft Graph, then new delegated permissions in the bar on the right. If Microsoft Graph is no show up as like in the screenshot.



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



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 otopo otopo_web_1 bin/otobo.Console.pl
↵Maint::PostMaster::MailAccountFetch
```

Tip: Add --debug for more verbosity

## 1.2.8 S/MIME

OTOBOS/MIMES/MIMES

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

Tip: S/MIMES/MIMES

OTOBOS/MIMES/MIMES S/MIME



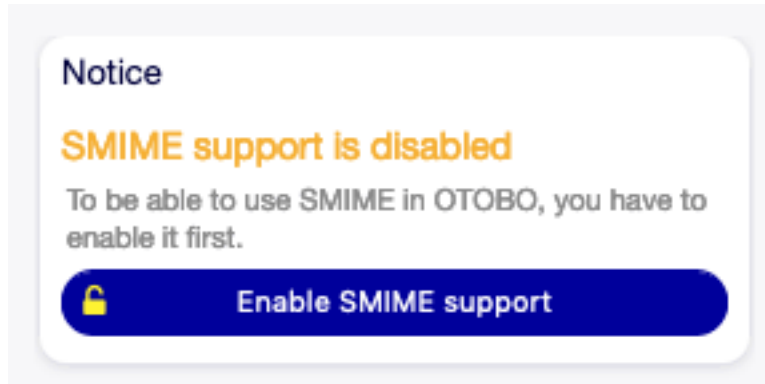
Figure 1.88: S/MIME

### S/MIME

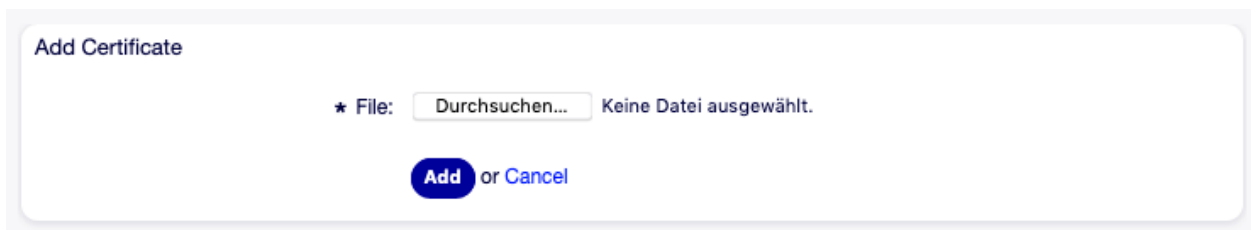
Tip: To be able to use S/MIME certificates in OTOBO, you have to activate its setting first.

OTOBOS/MIMES

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



1.89: S/MIME



1.90: S/MIME

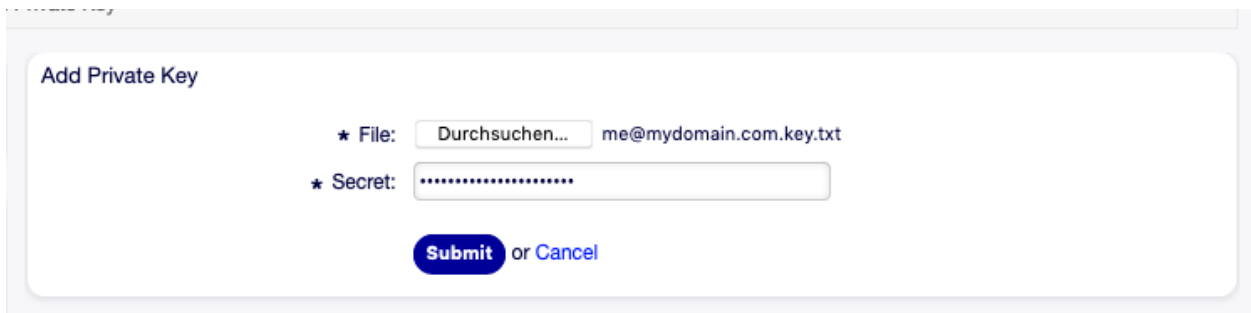
---

```
----- BEGIN CERTIFICATE -----
-----BEGIN ASCII base64-----
key.
pem root.crt cert.p7b
-----OpenSSL-----
```

---

-----

1. -----
2. \*...\*
3. -----
4. -----



1.91: S/MIME

S/MIME

1. S/MIME

2. 2.2.2.2

List							
	TYPE	SUBJECT	HASH	FINGERPRINT	CREATE	EXPIRES	DELETE
	cert	C = IL, O = StartCom Ltd., OU = Secure Digital Certificate Signing, CN = StartCom Certification Authority	ae8153b9	3E2B:F7:...	2006-09-17	2036-09-17	

1.92: S/MIME

S/MIME

S/MIME

Core → Crypt → SMIME

1.2.9

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.

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

**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
<a href="#">Ticket create notification</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
<a href="#">Ticket email delivery failure notification</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
<a href="#">Ticket escalation notification</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
<a href="#">Ticket escalation warning notification</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
<a href="#">Ticket follow-up notification (locked)</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
<a href="#">Ticket follow-up notification (unlocked)</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
<a href="#">Ticket lock timeout notification</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
<a href="#">Ticket new note notification</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
<a href="#">Ticket owner update notification</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
<a href="#">Ticket pending reminder notification (locked)</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			

1.93:

**List**

NAME	COMMENT	VALIDITY	CHANGED	CREATED	EXPORT	COPY	DELETE
<a href="#">Ticket create notification</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			
<a href="#">Ticket email delivery failure notification</a>		valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)			

1.94:



### Ticket notifications

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

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

Figure 1.96: Ticket notifications

## Events

▼ 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.

Figure 1.97: Events - Ticket

1. Select the event type from the dropdown menu.

2. Select the event.

3. Select the ticket filter.

4. Select the notification type.

5. Select the notification type.

6. Select the notification type.

7. Select the notification type.

8. Select the notification type.

9. Select the notification type.

10. Select the notification type.

11. Select the notification type.

12. Select the notification type.

<sup>1</sup> Select the notification type.

▼ Ticket Filter

State:

Priority:

Queue:

Lock:

Service:

SLA:

Customer ID:

Customer User ID:

**Dynamic Fields**

Process:

Activity:

1.98: 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:

1.99: 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: All agents subscribed to the ticket's queue x All agents subscribed to the ticket's service x

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.

Calendar:

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

1.100: -

- 
- 
- 
- 
- 
- 
- 
- 
-



- 
- 

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.

### Capability to Send Ticket Notifications Only During Working Hours

A new option has been added to the ticket notification settings. Now, within the recipient’s section, an additional field named “Calendar” is displayed.

1.101: Recipient block configuration

This field allows for the selection of whether notifications should be sent to recipients during working hours or outside of them:

- Selecting the option for working hours will result in notifications being sent only during the established work schedule.

Calendar:

1.102: Option working hours

- Conversely, choosing the non-working hours option will result in notifications being sent outside of the defined working hours.

Calendar:

1.103: Option outside working hours

Web

▼ 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:

1.104: 11.0 - 11.0

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

Additional recipients

Additional recipients

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

Additional recipients

Additional recipients PGP S/MIME

Additional recipients

PGP PGP

PGP PGP

PGP PGP

SMIME S/MIME

SMIME S/MIME

SMIME S/MIME

Additional recipients PGP S/MIME

Additional recipients

Additional recipients

Additional recipients

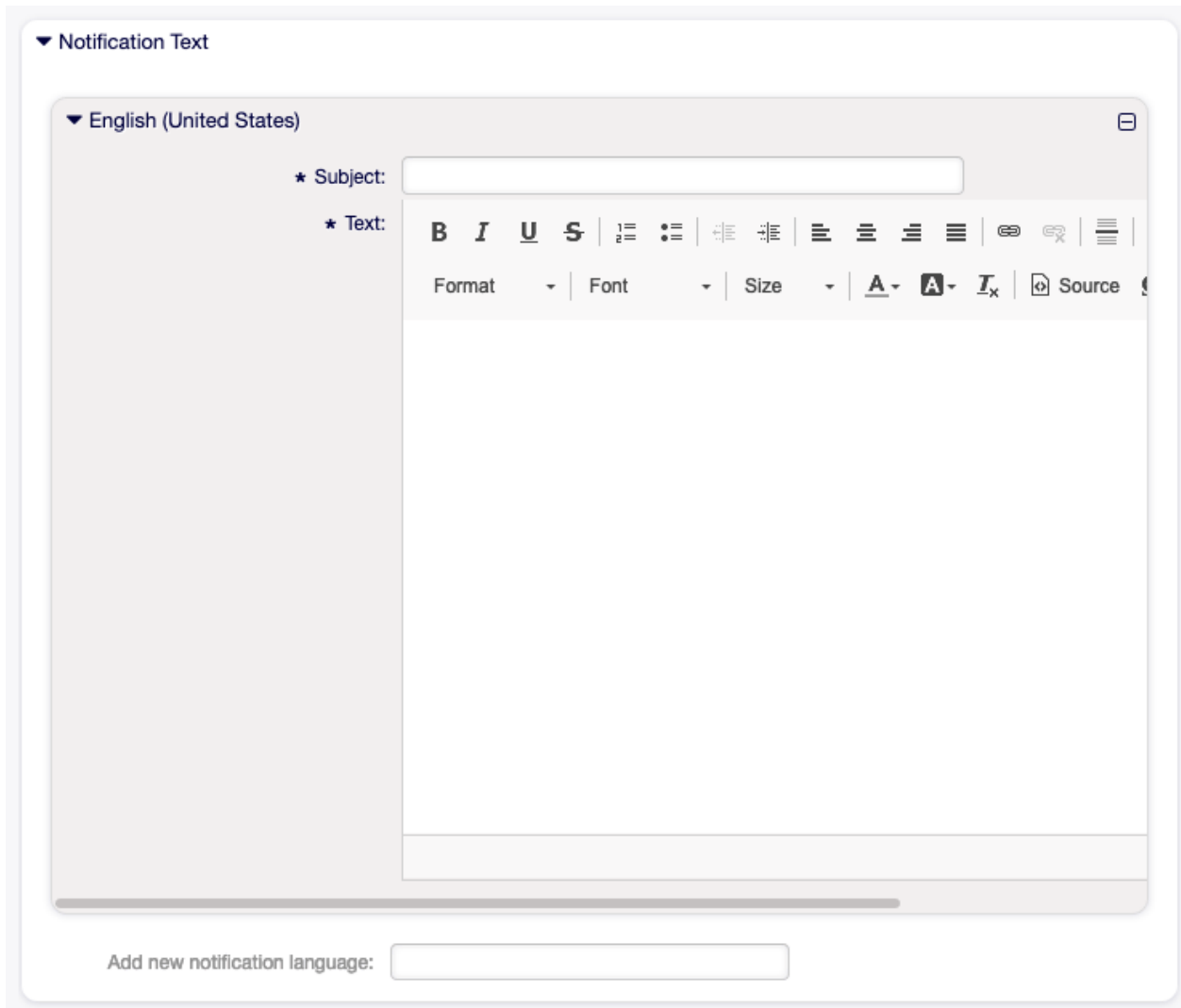
The main content of a notification can be added for each languages with localized subject and body text. It is also possible to define static text content mixed with OTOBO smart tags.

\* Additional recipients

\* Additional recipients

Additional recipients

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.



1.105: Notification Text - Configuration

Variables

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>
```

Example

```
Ticket#2018101042000012
```

### 1.3 Agents

Agents are used to manage the service desk and their use is described in the following chapter.

OTOBO provides powerful tools for this purpose and their use is described in the following chapter.

#### 1.3.1 Agent Management

Agent and access management for your service desk should be easy. Flexibility in adding, editing, invalidating access and a quick overview of which permissions a user has will help you maintain a clean permissions system and record of your setup in OTOBO.

OTOBO aids you giving you the power to manage agents within OTOBO across multiple back ends. OTOBO can use up-to ten back end sources, even marking some as read-only. Managing user settings centrally, an administrator can quickly invalidate a compromised account or set an account to out-of-office in case of an unexpected illness.

Use this screen to add agents to the system. A fresh OTOBO installation contains an agent with administrator privileges by default. The agent management screen is available in the Agents module of the Users, Groups & Roles group.

**Warning:** The superuser account username is root@localhost. Don't use the superuser account to work with OTOBO! Create new agents and work with these accounts instead. One of the adverse effects is that ACL will not have an effect on this user.

LDAP

LDAP: LDAP

Steps

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



Agent Management

**Actions**

Wildcards like \*\* are allowed.

**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)

1.107: [REDACTED]

**Add Agent**

Title or salutation:

\* Firstname:

\* Lastname:

\* Username:

Password:

Will be auto-generated if left empty.

\* Email:

Mobile:

Validity:

or

1.108: [REDACTED]

注意: 本手册中的所有截图均取自于 OTOBO 11.0 版本。

本手册中的所有截图均取自于 OTOBO 11.0 版本。

1. 本手册中的所有截图均取自于 OTOBO 11.0 版本。
2. 本手册中的所有截图均取自于 OTOBO 11.0 版本。
3. 本手册中的所有截图均取自于 OTOBO 11.0 版本。

**Edit Agent**

Title or salutation:

\* Firstname:

\* Lastname:

\* Username:

Password:

\* Email:

Mobile:

Validity:

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

图 1.109: 编辑代理

本手册中的所有截图均取自于 OTOBO 11.0 版本。

本手册中的所有截图均取自于 OTOBO 11.0 版本。

1. 本手册中的所有截图均取自于 OTOBO 11.0 版本。
2. 本手册中的所有截图均取自于 OTOBO 11.0 版本。

注意: 本手册中的所有截图均取自于 OTOBO 11.0 版本。

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\* 本手册中的所有截图均取自于 OTOBO 11.0 版本。



Effective Permissions for Agent

Group Permissions

GROUP	RO	MOVE_INT	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).

1.110: Group Permissions Matrix

\* FirstnameLastnameOrder

:

FirstnameLastnameOrder

\* FirstnameLastnameOrder

FirstnameLastnameOrder

Email \*

---

: Agent Configuration Options

---

Valid

\* 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.

Agents

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](mailto:support@otrs.ch) or in the OTOBO Portal.

---

LDAP

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 otobo)
#   $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** `LDAP://DNS/IP`

**BaseDN** `LDAP://`

**UID** `LDAP://`

---

`LDAP://Active Directory/sAMAccountName`

---

`LDAP://Config.pm` `LDAP://[1-9]`

```
### 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';
```

`LDAP://UID`

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

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

`Config.pm` `LDAP://[1-9]`

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

`Agent Synchronization Back End`

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

`LDAP://`

`LDAP://`

`LDAP://`

`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 =>
↳ '(|(mail=*abc.com)(mail=*xyz.com))'
#   $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** XXXXXXXXDNSXXXXIP  
**BaseDN** XXXXXXXX  
**UID** XXXXXXXX

---

XX: XXActive DirectoryXXX sAMAccountName

---



---

XX: XXXXXX Agent Synchronization Back End XXXXXXXXXXXXXXXXXXXXXXXXXXXX[1-9]XXXXXXXXXXXXXXXXXXXX  
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.

---



Change Group Relations for Agent Admin OTOBO

GROUP	<input checked="" type="checkbox"/> RO	<input checked="" type="checkbox"/> MOVE_INTO	<input checked="" type="checkbox"/> CREATE	<input checked="" type="checkbox"/> NOTE	<input checked="" type="checkbox"/> OWNER	<input checked="" type="checkbox"/> PRIORITY	<input checked="" type="checkbox"/> RW
admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
stats	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
users	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

1.112: 11.0.0.0

Change Agent Relations for Group users

AGENT	<input checked="" type="checkbox"/> RO	<input checked="" type="checkbox"/> MOVE_INTO	<input checked="" type="checkbox"/> CREATE	<input checked="" type="checkbox"/> NOTE	<input checked="" type="checkbox"/> OWNER	<input checked="" type="checkbox"/> PRIORITY	<input checked="" type="checkbox"/> RW
root@localhost (Admin OTOBO)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
sa (Super Admin)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

1.113: 11.0.0.0

11.0.0.0: 11.0.0.0

11.0.0.0: 11.0.0.0

11.0.0.0: 11.0.0.0

11.0.0.0: 11.0.0.0

11.0.0.0: 11.0.0.0

ro: 11.0.0.0/11.0.0.0

11.0.0.0/11.0.0.0

create: 11.0.0.0/11.0.0.0

note: 11.0.0.0/11.0.0.0

owner: 11.0.0.0/11.0.0.0

priority: 11.0.0.0/11.0.0.0

11.0.0.0/11.0.0.0

11.0.0.0/11.0.0.0

11.0.0.0/11.0.0.0

rw: 11.0.0.0/11.0.0.0



1. 1.115: 1.115

1.115: 1.115

1. 1.115: 1.115
2. 1.115: 1.115
3. 1.115: 1.115

Change Role Relations for Agent **Super Admin**

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

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

1.115: 1.115

1.116: 1.116

1. 1.116: 1.116
2. 1.116: 1.116
3. 1.116: 1.116

Change Agent Relations for Role **Supervisor**

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

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

1.116: 1.116

1.117: 1.117

1.118: 1.118

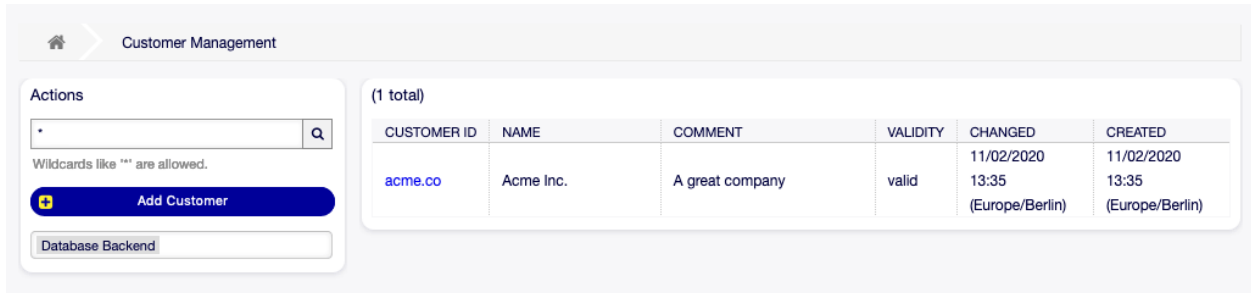
1.119: 1.119

1.120: 1.120



### 1.3.4

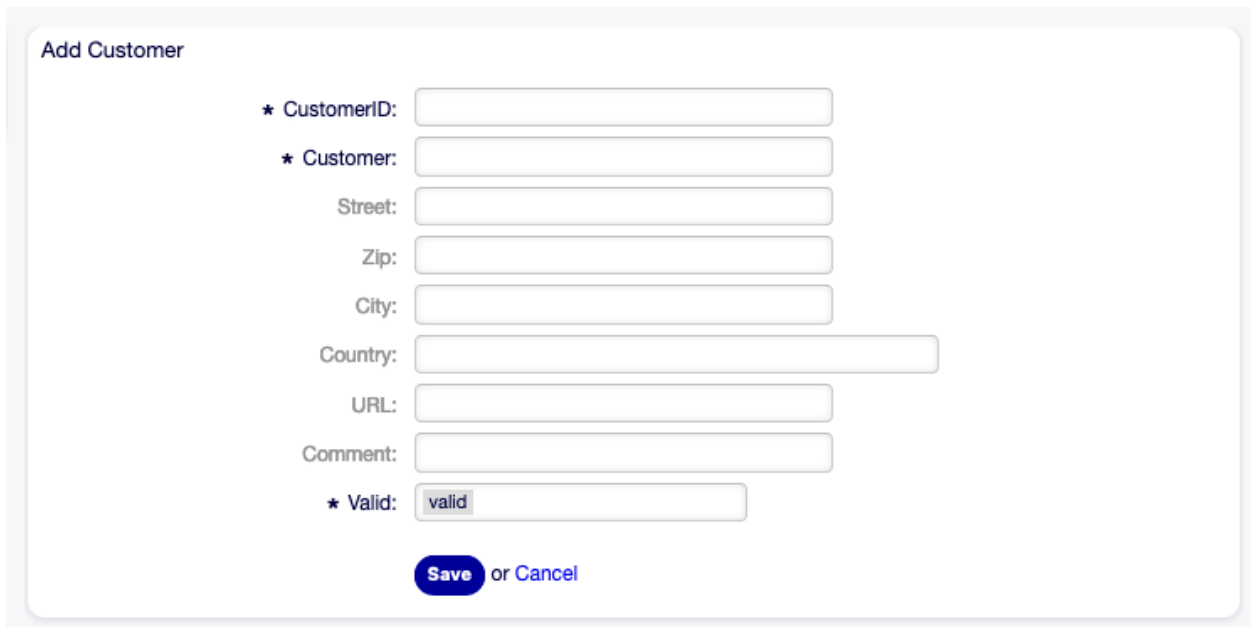
Use this screen to add customer companies to the system. A fresh OTOBO installation contains no customers by default. The customer management screen is available in the Customers module of the Users, Groups & Roles group.



1.117: Screenshot

LDAP

1. LDAP
2. LDAP
3. LDAP



1.118: Screenshot



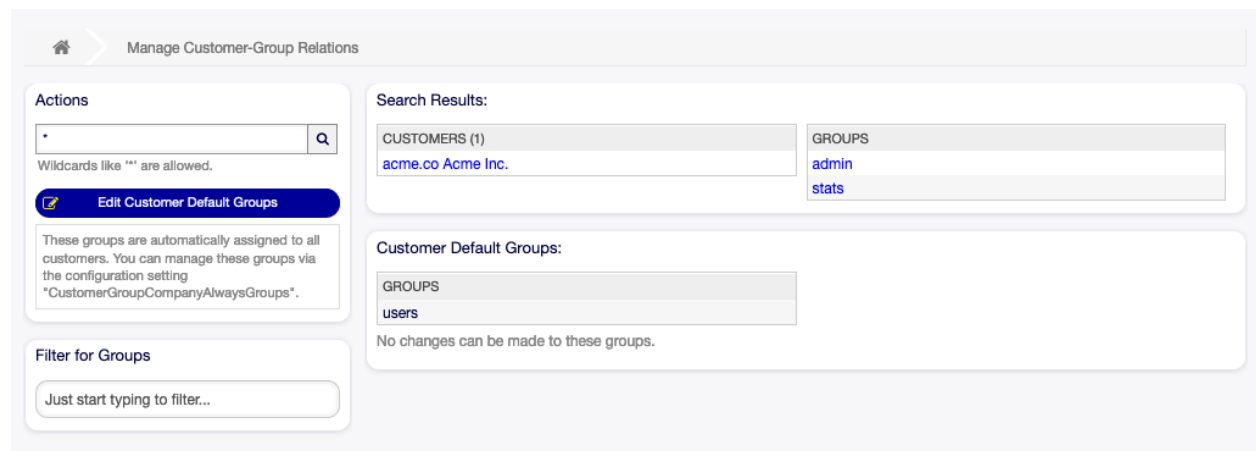
URL

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

### 1.3.5

OTOBO allows you to assign group permissions to a customer. 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.

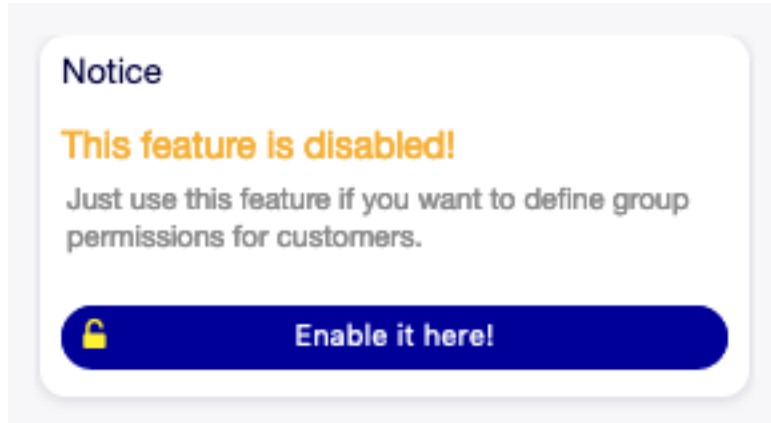
:



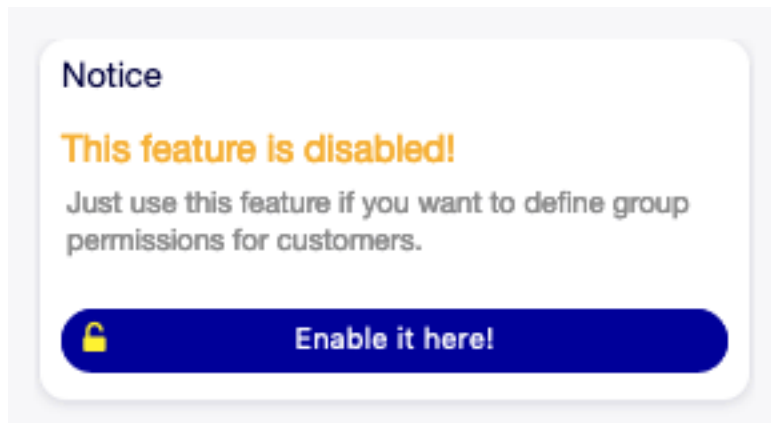
1.120: -

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



1.121: 00000000



1.122: 0000-0000

1. Select the customer
2. Select the groups
3. Select the permissions

Change Group Relations for Customer **Acme Inc.**

GROUP	SAME CUSTOMER	
	<input type="checkbox"/> RO	<input type="checkbox"/> RW
admin	<input type="checkbox"/>	<input type="checkbox"/>
stats	<input type="checkbox"/>	<input type="checkbox"/>

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

1.123: Change Group Relations

Procedure:

1. Select the customer
2. Select the groups
3. Select the permissions

Change Customer Relations for Group **admin**

CUSTOMER (1)	SAME CUSTOMER	
	<input type="checkbox"/> RO	<input type="checkbox"/> RW
acme.co Acme Inc.	<input type="checkbox"/>	<input type="checkbox"/>

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

1.124: Change Customer Relations

Procedure:

1. Select the groups
2. Add or modify groups in setting CustomerGroupCompanyAlwaysGroups.
3. Select the permissions

**CustomerGroupCompanyAlwaysGroups**

users

Defines the groups every customer will be in (if CustomerGroupSupport is enabled and you don't want to manage every customer for these groups).

1.125: CustomerGroupCompanyAlwaysGroups

Procedure:

OTOB: [redacted]

[redacted] \*OTOB\* [redacted] \*OTOB\* [redacted]

OTOB: [redacted]

OTOB [redacted]

[redacted] [redacted]

[redacted] ID [redacted] ID [redacted]

ro [redacted]

rw [redacted]

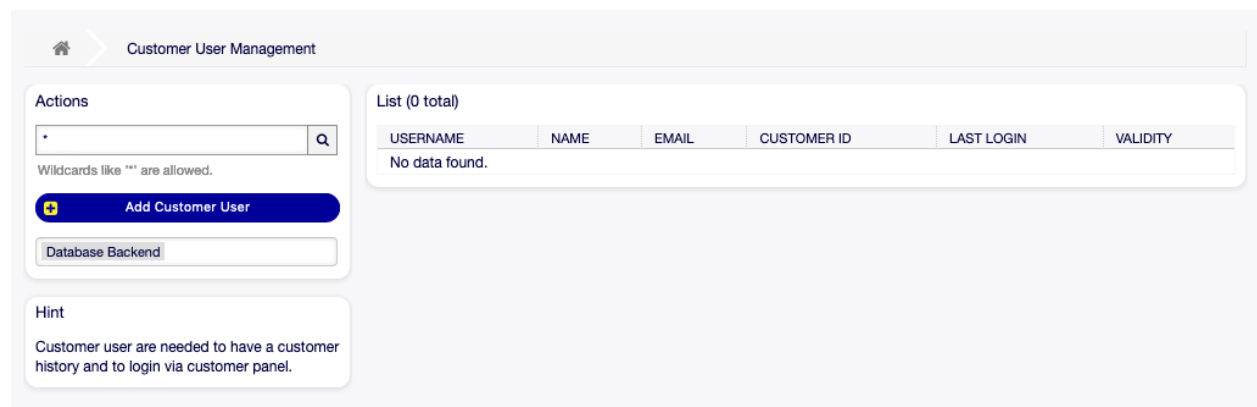
OTOB: [redacted]

### 1.3.6 [redacted]

[redacted]

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

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



1.126: [redacted]

LDAP

LDAP: 192.168.1.100:389

LDAP: 192.168.1.100:389

LDAP

1. LDAP 192.168.1.100
2. LDAP
3. LDAP 192.168.1.100

LDAP: 192.168.1.100:389

LDAP

1. LDAP 192.168.1.100
2. LDAP
3. LDAP 192.168.1.100

LDAP

1. LDAP 192.168.1.100
2. LDAP 192.168.1.100

LDAP: 192.168.1.100:389

LDAP: 192.168.1.100:389

LDAP:

LDAP 192.168.1.100

LDAP

LDAP: 192.168.1.100:389

LDAP: 192.168.1.100:389

LDAP: 192.168.1.100:389

LDAP \*

LDAP \*

LDAP \*

LDAP \*

Email \*

### 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

1.127: 11.0



### 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**

1.128: 1111111111

**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.

1.129: Effective Permissions for Customer User

**CustomerID \*** The ID of the customer company the customer user belongs to. Select a customer from the list of [dropdown].

[dropdown]

[dropdown]

[dropdown]

[dropdown]

[dropdown]

[dropdown]

[dropdown]/[dropdown]

[dropdown] [dropdown]

[checkbox] 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.

[checkbox]:

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

### 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 backend. The example below shows the configuration of a LDAP customer user backend.

```
# 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'),
↪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.

## 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 => {
```





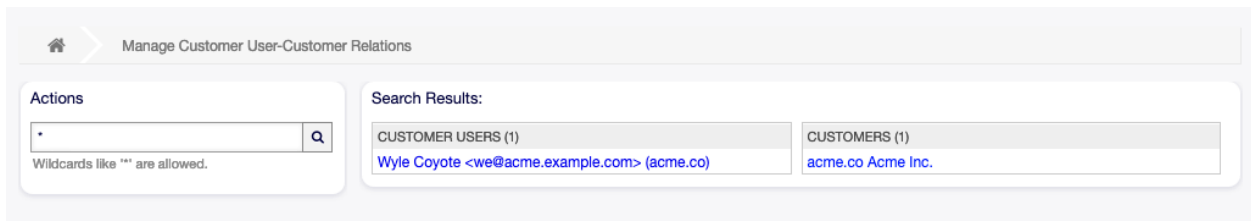


Figure 1.130: Search Results

Click on the search results to view details.

Click on the search results to view details.

Click on the search results to view details.

1. Click on the search results to view details.
2. Click on the search results to view details.
3. Click on the search results to view details.



Figure 1.131: Change Customer Relations for Customer User

Click on the search results to view details.

1. Click on the search results to view details.
2. Click on the search results to view details.
3. Click on the search results to view details.

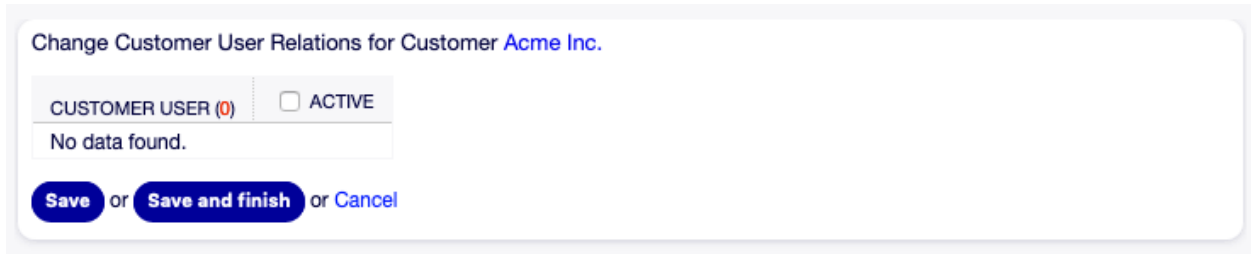


Figure 1.132: Change Customer User Relations for Customer

Click on the search results to view details.



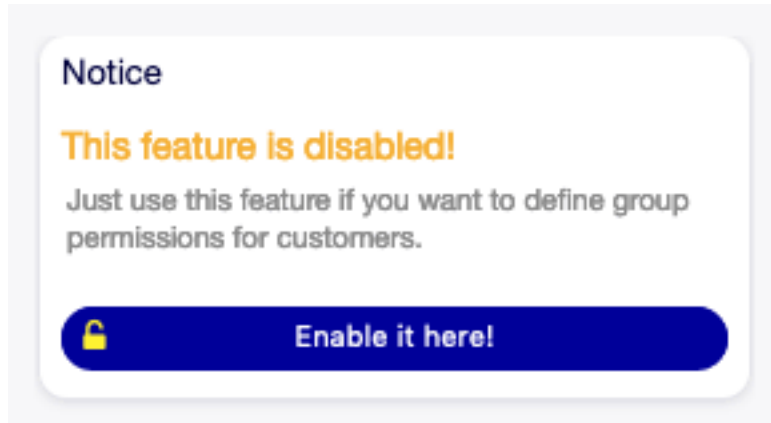


Figure 1.134: Notice

Prerequisites

1. User must be logged in as an administrator.

1. The user must be logged in as an administrator.
2. The user must be logged in as an administrator.
3. The user must be logged in as an administrator.



Figure 1.135: Change Group Relations

Prerequisites

1. The user must be logged in as an administrator.
2. The user must be logged in as an administrator.
3. The user must be logged in as an administrator.

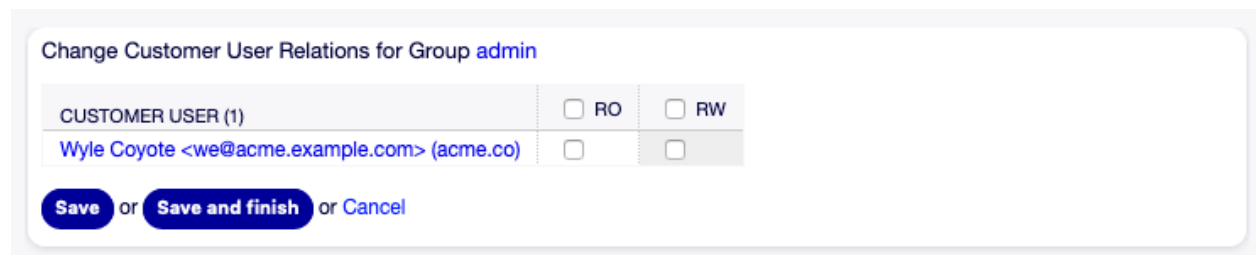
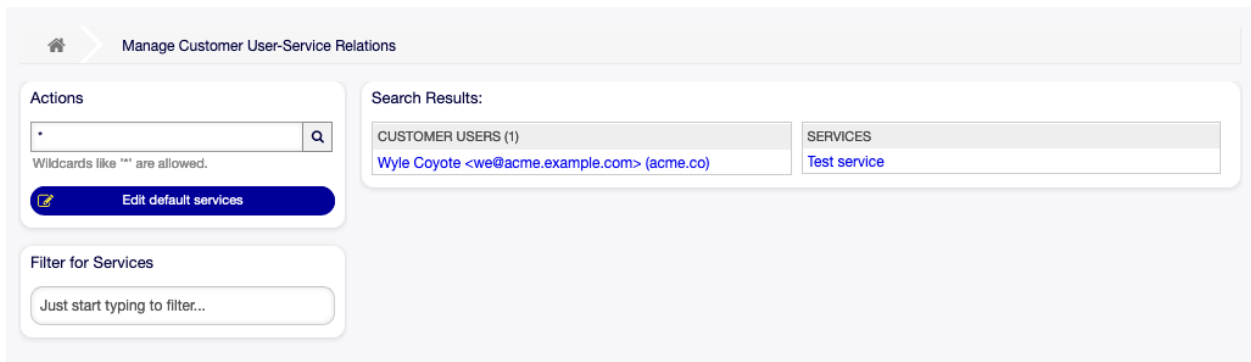
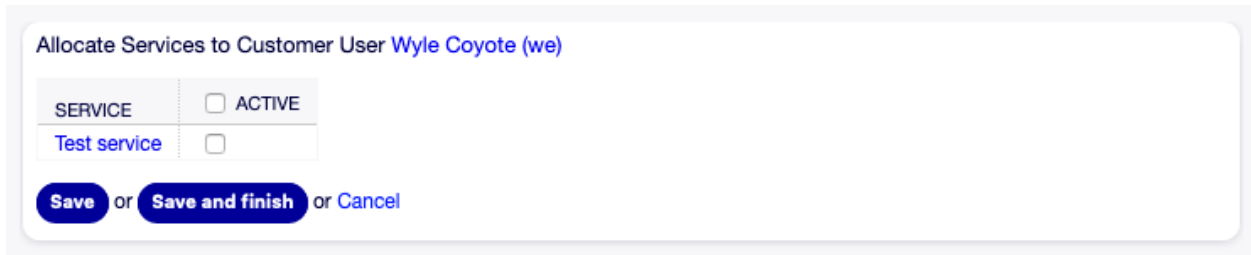


Figure 1.136: Change Customer User Relations





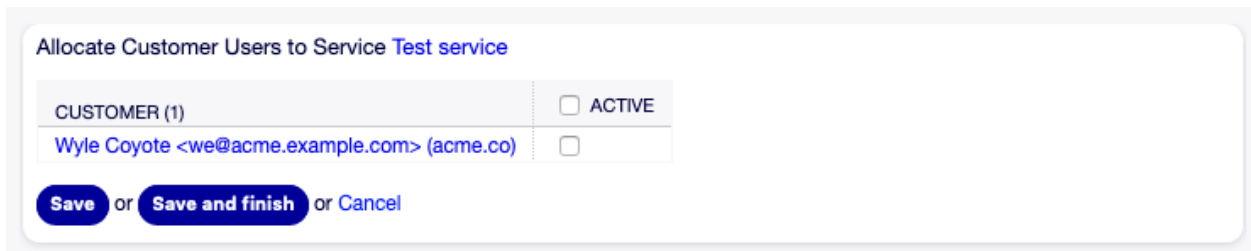
1.138: 11.0-11.0



1.139: 11.0-11.0

11.0-11.0

1. 11.0-11.0
2. 11.0-11.0
3. 11.0-11.0



1.140: 11.0-11.0

11.0: 11.0-11.0

11.0-11.0

11.0: 11.0-11.0

11.0: 11.0-11.0

1.141

Allocate Services to Customer User

1.141

1. Select the service to allocate
2. Select the user to allocate to
3. Click the Allocate button

1.141: Allocate Services to Customer User

1.141: Allocate Services to Customer User

### 1.3.10 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.

NAME	COMMENT	VALIDITY	CHANGED	CREATED
admin	Group of all administrators.	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
stats	Group for statistics access.	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)
users	Group for default access.	valid	09/21/2020 17:08 (Europe/Berlin)	09/21/2020 17:08 (Europe/Berlin)

1.142: Groups

1.3

1.3

1. Add Group
2. Add Group
3. Add Group

**Add Group**

\* Name:

\* Validity:

Comment:

**Save** or **Cancel**

1.143: Add Group

1.143: Add Group

Add Group

1. Add Group
2. Add Group
3. Add Group

**Edit Group**

\* Name:

\* Validity:

Comment:

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

1.144: Edit Group

1.144: Edit Group

Edit Group

1.144: Edit Group

\* 1.144: Edit Group

1.144: 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.

:

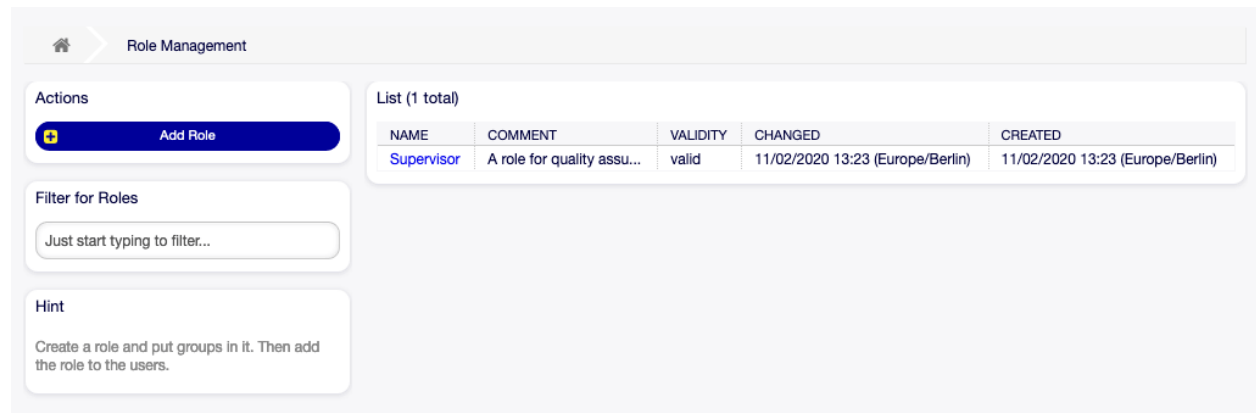
**admin**

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

**users**

### 1.3.11

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.



1.145:

1.
2.
3.

:

**Add Role**

\* Name:

\* Validity:

Comment:

**Save** or **Cancel**

1.146: Add Role

1. Add Role

1. Add Role
2. Add Role
3. Add Role

**Edit Role**

\* Name:

\* Validity:

Comment:

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

1.147: Edit Role

1.147: Edit Role

1.147: Edit Role

1.147: Edit Role

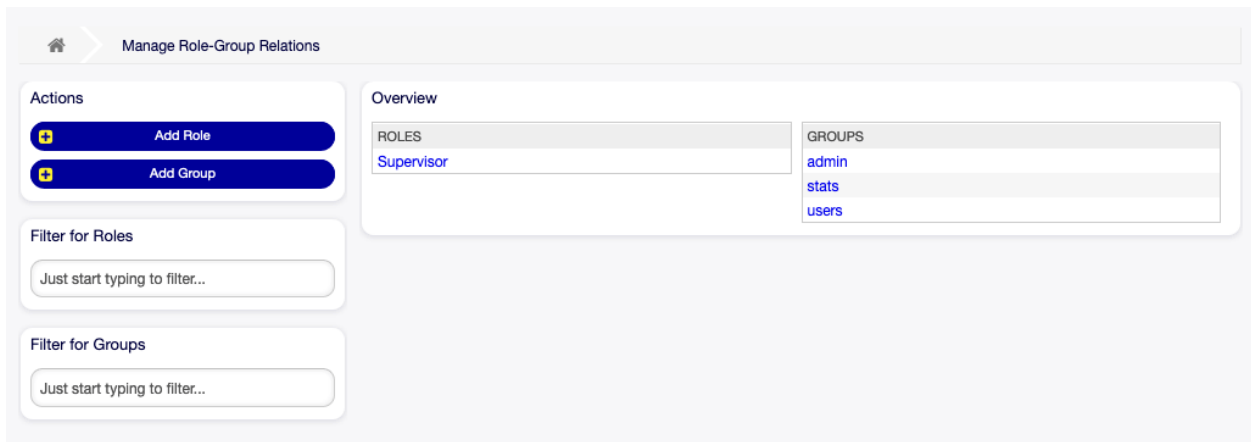
1.147: Edit Role

1.147: Edit Role

1.147: Edit Role

### 1.3.12 Add Role

1.3.12 Add Role

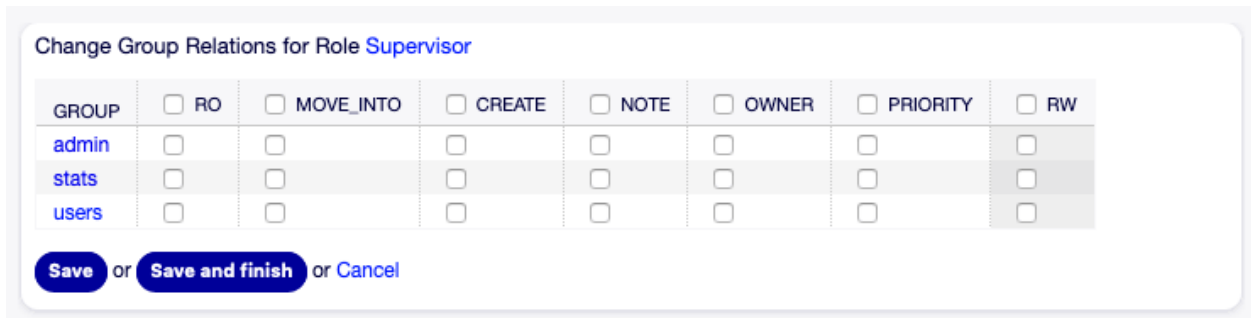


1.148: 管理角色-组关系

1. 单击“管理角色-组关系”

2. 单击“添加角色”

1. 单击“添加角色”
2. 单击“添加组”
3. 单击“保存”



1.149: 更改组关系

1. 单击“更改组关系”

1. 单击“更改组关系”
2. 单击“添加组”
3. 单击“保存”

注意：更改组关系时，请确保所选组具有足够的权限。

单击“保存”后，系统将自动保存更改。

注意：更改组关系时，请确保所选组具有足够的权限。

**Change Role Relations for Group users**

ROLE	<input type="checkbox"/> RO	<input type="checkbox"/> MOVE_INT0	<input type="checkbox"/> CREATE	<input type="checkbox"/> NOTE	<input type="checkbox"/> OWNER	<input type="checkbox"/> PRIORITY	<input type="checkbox"/> RW
Supervisor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

or 
  or

1.150: 11.0

1.150

1.150

**ro** 11.0/11.0 '11.0'

11.0 11.0/11.0

**create** 11.0 11.0/11.0

**note** 11.0 11.0/11.0

**owner** 11.0 11.0/11.0

**priority** 11.0 11.0/11.0

11.0 11.0/11.0

11.0 11.0/11.0

11.0 11.0/11.0

**rw** 11.0 11.0/11.0

11.0:

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** 11.0 11.0

11.0 11.0/11.0

11.0 11.0/11.0

11.0 11.0/11.0

11.0 11.0/11.0

11.0 11.0/11.0

11.0 11.0/11.0

11.0 11.0/11.0

---

11.0: 11.0/11.0 rw 11.0/11.0

---

## 1.4 1.4.1

1.4.1

1.4.1

1.4.1

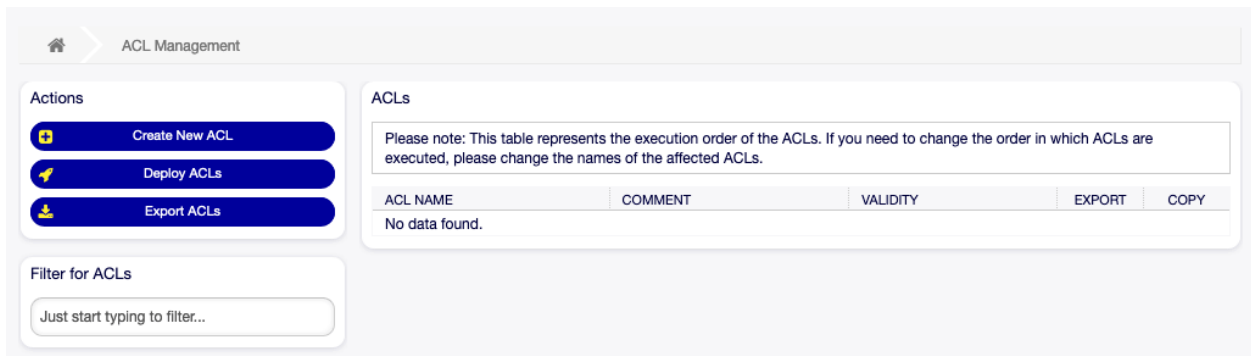
OTOBO offers many options to automate tasks based on events, time, external systems and defined processes. OTOBO also includes the possibility to add individual information types to tickets and help agents to lower their error rate when working with tickets by allowing only defined activities for tickets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

### 1.4.1 1.4.1.1 (ACL)

1.4.1.1

OTOBO 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.



1.151: ACL

1.4.1.1

1.4.1.1

1.4.1.1

1.4.1.1

1. 1.4.1.1
2. 1.4.1.1

3. 名前を指定する
4. 名前を指定する ACL の名前を指定する

**Create New ACL**

\* Name:

Comment:

Description:

Stop after match:

\* Validity:

**Save** or Cancel

図 1.152: ACL の作成

ACL の作成

1. ACL の名前を指定する
2. ACL のコメントを指定する
3. ACL の説明を指定する
4. ACL の有効性を指定する

ACL の作成

1. ACL の名前を指定する
2. ACL のコメントを指定する
3. ACL の説明を指定する
4. ACL の有効性を指定する
5. ACL の作成
6. ACL の作成

```

ACLPerf: zzzacl.pm
ACLPerf: zzzacl.pm
    
```

ACL の作成

1. ACL の名前を指定する

ACLPerf: zzzacl.pm

ACL の作成

1. ACL の名前を指定する

▼ 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

1.153: ACL





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]

### ACL

5 very high

100-Example-ACL

**Create New ACL**

**\* Name:**

**Comment:**

**Description:**

This example shows you how to allow movement into a queue of only those tickets with ticket priority "5 very high"

**Stop after match:**

**\* Validity:**

**Save** or **Cancel**

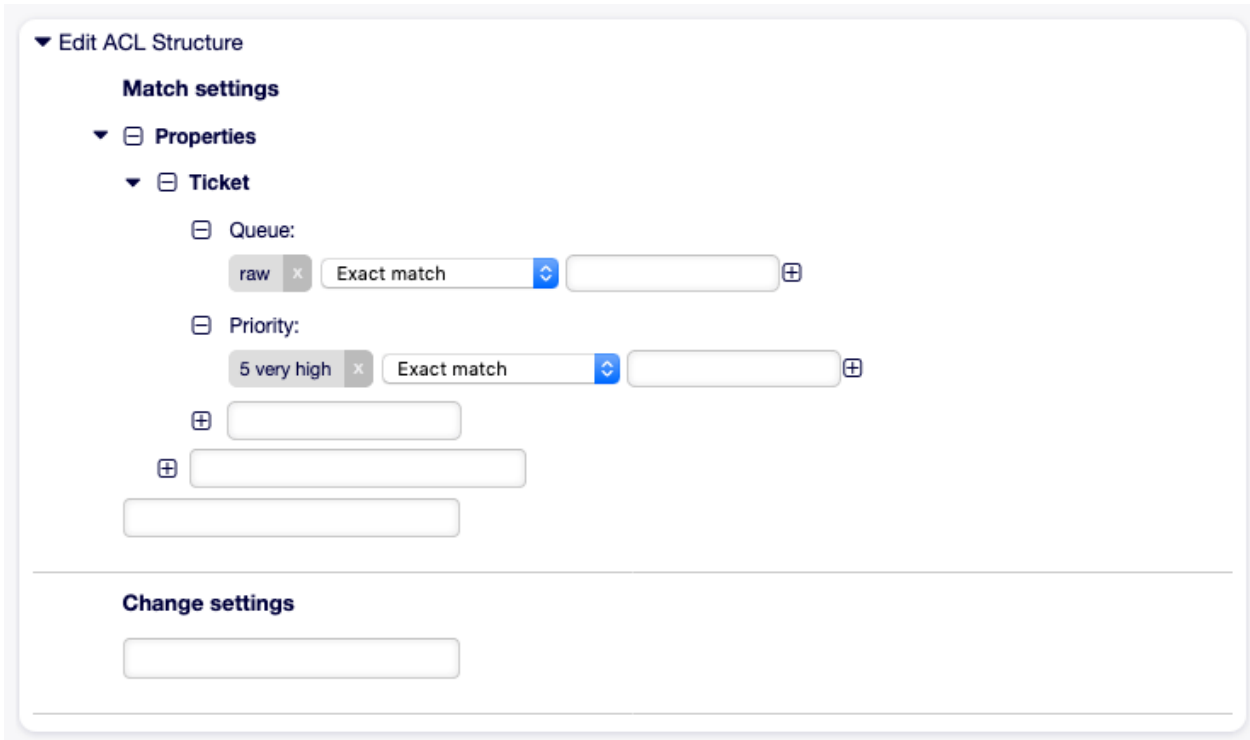
1.154: 100-Example-ACL -

Raw 5 very high Raw 3 normal ACL 5 very high

Possible Alert

ACL

Raw 5 very high ACL



1.155: 100-Example-ACL - 11.0

1.155: 100-Example-ACL - 11.0

1.155: 100-Example-ACL - 11.0

1.155: 100-Example-ACL - 11.0

1.155: 100-Example-ACL - 11.0

1.155: 100-Example-ACL - 11.0

1.155: 100-Example-ACL - 11.0

1.155: 100-Example-ACL - 11.0

1.155: 100-Example-ACL - 11.0

### 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.

▼ Edit ACL Structure

**Match settings**

▼ Properties

▼ Ticket

Queue: raw × Exact match [dropdown] [input] ⊕

Priority: 5 very high × Exact match [dropdown] [input] ⊕

[input] ⊕

[input] ⊕

[input]

---

**Change settings**

▼ Possible

▼ Ticket

Queue: Alert × Exact match [dropdown] [input] ⊕

[input] ⊕

[input] ⊕

[input]

1.156: 100-Example-ACL - 11.0

▼ Edit ACL Structure

**Match settings**

▼ PropertiesDatabase

▼ Ticket

Queue:

Raw × Exact match [dropdown] [input] ⊕

Priority:

5 very high × Exact match [dropdown] [input] ⊕

[input] ⊕

[input] ⊕

[input]

---

**Change settings**

▼ Possible

▼ Ticket

Queue:

Alert × Exact match [dropdown] [input] ⊕

[input] ⊕

[input] ⊕

[input]

1.157: 101-Example-ACL

▼ Edit ACL Structure

**Match settings**

▼ Properties

▼ Ticket

Queue:

Raw x Exact match [dropdown] [input] ⊕

⊕ [input]

⊕ [input]

[input]

---

**Change settings**

▼ Possible

▼ Ticket

State:

new x open x pending reminder x Exact match [dropdown] [input] ⊕

⊕ [input]

⊕ [input]

▼ PossibleNot

▼ Action

AgentTicketClose x ⊕

⊕ [input]

[input]

1.158: 102-Example-ACL

▼ Edit ACL Structure

**Match settings**

---

**Change settings**

▼  PossibleNot

▼  Ticket

State:

closed successful Exact match

1.159: 103-Example-ACL

▼ Edit ACL Structure

**Match settings**

▼  Properties

▼  Ticket

Queue:

[RegExp]HW Regular expression

---

**Change settings**

▼  Possible

▼  Ticket

Queue:

[RegExp]^Hardware Regular expression

1.160: 104-Example-ACL

▼ Edit ACL Structure

**Match settings**

▼ Properties

▼ CustomerUser

UserCustomerID:

TheCustomerID x Exact match  ⊕

⊕

⊕

---

**Change settings**

▼ PossibleNot

▼ Process

P14 x Exact match  ⊕

⊕

1.161: 105-Example-ACL

▼ Edit ACL Structure

**Match settings**

▼  Properties

▼  Process

ProcessEntityID:

Process-01234567890abcdef x ⊕

⊕

⊕ - ▾

---

**Change settings**

▼  PossibleNot

▼  Action

CustomerTicketZoomReply x ⊕

⊕ - ▾

1.162: 106-Example-ACL



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).
      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-aff0ae05fe6803f38de8ff6cf33b7ce
  - 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

```

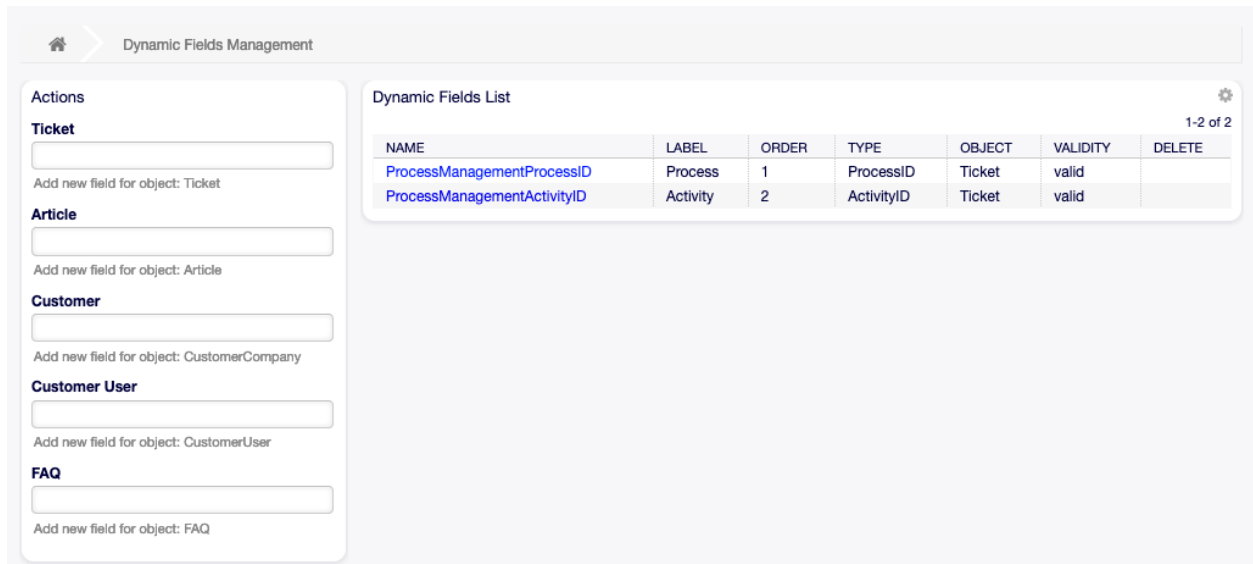
ValidID: 3

### 1.4.2

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.








 1.163:      

#### 

#### 

1. Choose an object type in the left actions sidebar and select a dynamic field type from its drop-down.
2. 
3.   

#### 

1. Click on a dynamic field in the dynamic fields list.
2. 
3.    

####



1.
2.

Dynamic Fields List <span style="float: right;">1-2 of 2</span>						
NAME	LABEL	ORDER	TYPE	OBJECT	VALIDITY	DELETE
<a href="#">ProcessManagementProcessID</a>	Process	1	ProcessID	Ticket	valid	
<a href="#">ProcessManagementActivityID</a>	Activity	2	ActivityID	Ticket	valid	

1.166:

:

### General

**\* Name:**

Must be unique and only accept alphabetic and numeric characters.

**\* Label:**

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.

Validity:

Field type:

Object type:

### Checkbox Field Settings

Default value:

This is the default value for this field.

1.167:

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

Object type \*

Label:

ValidID \*

ValidID \* 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.

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

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

Object type: 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.

true  false

**Checkbox Field Settings**

Default value:

This is the default value for this field.

1.168:

Object type \*

Name \* Name  Name

ValidID \* ValidID  ValidID

Label: Name  ValidID  ValidID



### 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.

### 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.

1.169: ██████████

1. 1.170: 1.170

2. 1.171: 1.171

1.170: Name ValidID

1.171: 1.171

2. 1.172: 1.172

1.172: Name

1.173: 1.173

1.174: 1.174

1.175: 1.175

**Contact with data management**

Contact with data

**Actions**

Phone:

\*

Wildcards like \*\* are allowed.

**List (Phone)**

NAME	VALID
Internal Helpdesk	valid
Network Operations	valid

1.170: 1.170

1.171: 1.171

1. 1.171: 1.171
2. 1.172: 1.172
3. 1.173: 1.173
4. 1.174: 1.174

**Add contact with data (Phone)**

\* Name:

Phone:

\* Validity:

or

1.171: 1.171





### 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.

1.174: 日期/时间域设置

默认日期差异: 输入框 - 秒

定义年份范围: 输入框

显示链接: 输入框

---

链接预览: 输入框

---

限制日期输入: 输入框

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

这里可以指定一个可选的 HTTP 链接，用于在概览和放大视图中显示该域值的链接。

如果特殊字符（&、@、:、/ 等）不应被编码，请使用 'uri' 而不是 'uri' 过滤器。

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

如果在此处填写，当鼠标悬停在链接上时，将在放大视图中显示预览。

请注意，要使此功能正常工作，必须同时填写上述的常规 URL 域。

在这里，您可以限制日期输入。

在这里，您可以限制日期输入。

### 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.

1.175: ██████████



**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 '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.

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:

1.177: 

**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:

1.178: 



Dynamic field configuration for xms

^[0-9]\$

Dynamic field configuration

Dynamic field configuration

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

### Web

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

Dynamic field configuration

Dynamic field configuration

- Dynamic field configuration
- Dynamic field configuration
- Field ID → Name → Configuration
- Field ID ### DynamicField Configuration
- Field ID + Configuration
- Dynamic field configuration
- Field 1 - Field 2 - Configuration
- Dynamic field configuration
- Dynamic field configuration



1.179: Dynamic field configuration

5: 5-7

TicketCreate

- 1.
2. Ticket::EventModulePost###9600-TicketDynamicFieldDefault
- 3.
- 4.
- 5.

**Ticket::EventModulePost###9600-TicketDynamicFieldDefault**

Module → Kernel::System::Ticket::Event::Ticketf	-	+	Event module registration. For more performance you can define a trigger event (e. g. Event => TicketCreate). This is only possible if all Ticket dynamic fields need the same event.
Transaction → 1	-		

✓ ✗

1.180:

TicketCreate (Field1)

- 1.
2. DynamicFieldDefault Ticket::TicketDynamicFieldDefault###Element1
- 3.
- 4.
- 5.

**Ticket::TicketDynamicFieldDefault###Element1**

Event	→	TicketCreate
Name	→	Field1
Value	→	Default

Configures a default TicketDynamicField setting. "Name" defines the dynamic field which should be used, "Value" is the data that will be set, and "Event" defines the trigger event. Please check the developer manual (<https://doc.otobo.org/doc/>), chapter "Ticket Event Module".

1.181:

16 Ticket::TicketDynamicFieldDefault###Element

:

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.

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

→

Name\_X XML

XML PreferencesGroups###DynamicField

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

### 1.4.3

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

If

- 
- 
- 
- 

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.

PreferencesGroups###DynamicField
☰

✖ Disable
🕒 History
↺ Reset setting
🔗 Copy direct link
☆ Add to favourites
✔ Save
✖ Cancel

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.

1.182: PreferencesGroups###DynamicField

**NameX**

Default value for

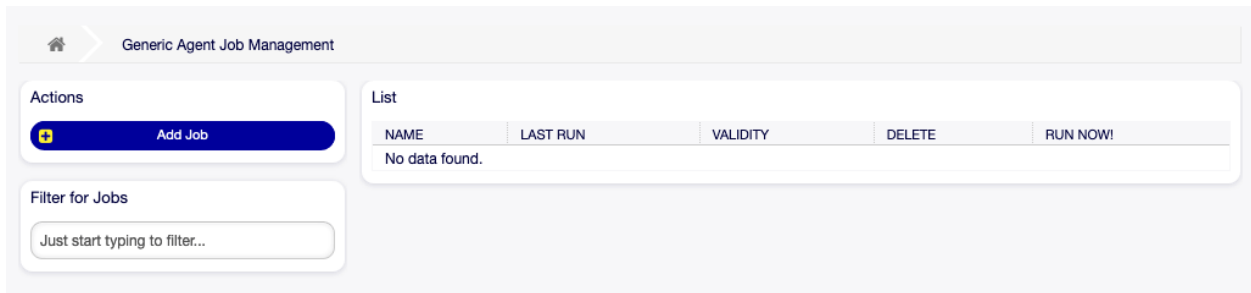
NameX:

This is a Description for DynamicField on Framework.

✔

1.183: NameX

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.

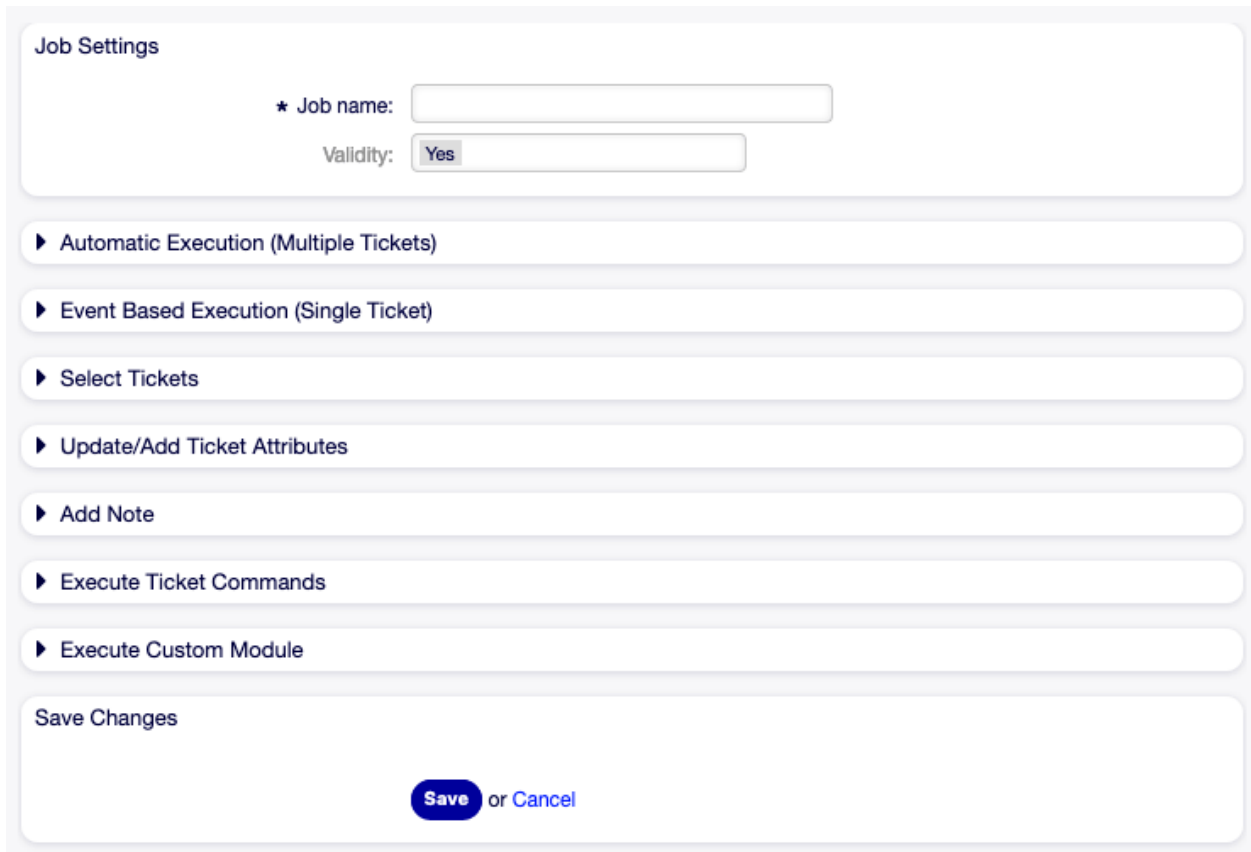


1.184: Generic Agent Job Management

1.184: Generic Agent Job Management

1.184: Generic Agent Job Management

1. Add Job
2. Filter for Jobs
3. Add Job



1.185: Job Settings

1.186: Job Settings

1. Job name: Test job
2. Validity: Yes
3. Automatic Execution (Multiple Tickets)

**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

or 
  or

1.186: Job Settings

1.187: Job List

1. Job name: Test job
2. Validity: valid

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

1.187: Job List

1.188: Job Settings



▼ Event Based Execution (Single Ticket)

Event Triggers:	TYPE	EVENT	DELETE
-----------------	------	-------	--------

Additionally or alternatively to a periodic execution, you can define ticket events that will trigger this job. If a ticket event is fired, the ticket filter will be applied to check if the ticket matches. Only then the job is run on that ticket.

Add Event Trigger:

To add a new event select the event object and event name.

1.190: 11.0 - 11.0

11.0

11.0

11.0

11/11.0

11.0/11.0

11.0

11.0

11.0

▼ Add Note

From:

Subject:

Text:

Visible for customer:

Time units (work units):

1.191: 11.0 - 11.0



1.192

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!**

1.192: Execute Ticket Commands

Execute Ticket Commands Yes/Execute Ticket Commands

ARG[0] Ticket Number ARG[1] Ticket ID

Execute Ticket Commands : Execute Ticket Commands

Execute Ticket Commands Yes/Execute Ticket Commands

Execute Ticket Commands

1.193

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:

1.193: Execute Custom Module

Execute Custom Module

OTOBOTicket: Ticket : : Ticket

OTOBOTicket: Ticket

OTOBOTicket: Ticket

### 1.4.4 Ticket

OTOBOTicket: Ticket : : Ticket

OTOBO supports this requirement by process management. Process tickets help by using the required mandatory and optional fields (see Ticket) that information is not forgotten upon ticket creation or during later steps of the process. Process tickets are simple to handle for customer users and agents, so no intensive training is required.

Processes are designed completely and efficiently within the OTOBO front end to fit the requirements of your organization.

OTOBOTicket: Ticket : : Ticket

OTOBOTicket: Ticket

OTOBOTicket: Ticket

1. OTOBOTicket: Ticket
2. OTOBOTicket: Ticket
3. OTOBOTicket: Ticket
4. Add activities, activity dialogs, transitions and transition actions.
5. OTOBOTicket: Ticket
6. OTOBOTicket: Ticket

1.194: OTOBOTicket: Ticket

OTOBOTicket: Ticket

1. OTOBOTicket: Ticket
2. OTOBOTicket: Ticket



Before import of a process, it is still necessary to create all `roles`, `permissions` and `groups`, 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`

`roles`

Example: `permissions` (BPMN) ISO

Example: `groups`

**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 <a href="#">✎</a>
Order denied	A <a href="#">✎</a>
Shipment received	A <a href="#">✎</a>
Order placed	A <a href="#">✎</a>
Approved	A <a href="#">✎</a>
Approval denied	A <a href="#">✎</a>

[Create New Activity Dialog](#)

ASSIGNED ACTIVITY DIALOGS

1.195: `roles`

Example: `roles`

Example: `permissions`

Example: `groups`

- `roles`
- `permissions`
- `groups`

Example: `permissions` (BPMN) ISO

Example: `groups`

Example: `roles`

- `roles`
- `permissions`



**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

ASSIGNED USER TASK ACTIVITY DIALOGS

1.197:

- 
- 
- 

**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.

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.

<p>Title: Prozessmanagement für Dummies          Autor: Thilo Knuppertz          ISBN: 35210.03713</p>
--

11.1.1

11.1.1.1

11.1.1.1.1

- 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**.

11.1.2

11.1.2.1

11.1.2.1.1

- 11.1.2.1.1.1
- 11.1.2.1.1.2
- 11.1.2.1.1.3
- 11.1.2.1.1.4

11.1.2.1.2

- 11.1.2.1.2.1
- 11.1.2.1.2.2

11.1.2.1.3

11.1.2.1.3.1	11.1.2.1.3.1.1	11.1.2.1.3.1.1.1	11.1.2.1.3.1.1.1.1	11.1.2.1.3.1.1.1.1.1
11.1.2.1.3.1	11.1.2.1.3.1.1	Title	11.1.2.1.3.1.1.1	
11.1.2.1.3.1	11.1.2.1.3.1.1	Author	11.1.2.1.3.1.1.1	
11.1.2.1.3.1	11.1.2.1.3.1.1	ISBN	ISBN	
11.1.2.1.3.1	11.1.2.1.3.1.1.1.1.1	Status	11.1.2.1.3.1.1.1.1.1	<ul style="list-style-type: none"> <li>• 11.1.2.1.3.1.1.1.1.1.1</li> <li>• 11.1.2.1.3.1.1.1.1.1.2</li> <li>• 11.1.2.1.3.1.1.1.1.1.3</li> <li>• 11.1.2.1.3.1.1.1.1.1.4</li> <li>• 11.1.2.1.3.1.1.1.1.1.5</li> </ul>
11.1.2.1.3.1	11.1.2.1.3.1.1	Supplier	11.1.2.1.3.1.1.1	
11.1.2.1.3.1	11.1.2.1.3.1.1	Price	11.1.2.1.3.1.1.1	
11.1.2.1.3.1	11.1.2.1.3.1.1	DeliveryDate	11.1.2.1.3.1.1.1	
11.1.2.1.3.1	11.1.2.1.3.1.1	DateOfReceipt	11.1.2.1.3.1.1.1	

11.1.2.1.3.1.1.1.1.1







**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:

1.200: 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	

1.201: Book Ordering - Add Activity Dialog Fields

### Edit Field Details: Article ✕

Description (short):

Description (long):

Default value:

Communication Channel:

Is visible for customer:

Time units:

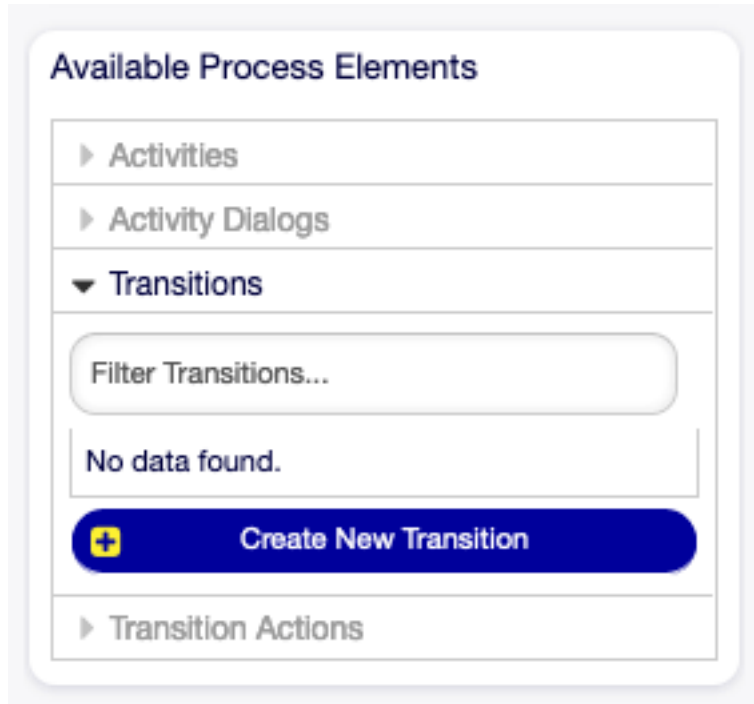
Display:

1.202: 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.



1.203: 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`

**Create New Transition**

[Cancel & close](#)

▼ Transition

★ Transition Name:

▼ Conditions

Conditions can only operate on non-empty fields.

Type of Linking between Conditions:

Condition 1

Type of Linking:

Fields

Name:  Type:  Value:

[Add New Condition](#)

1.204: 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.

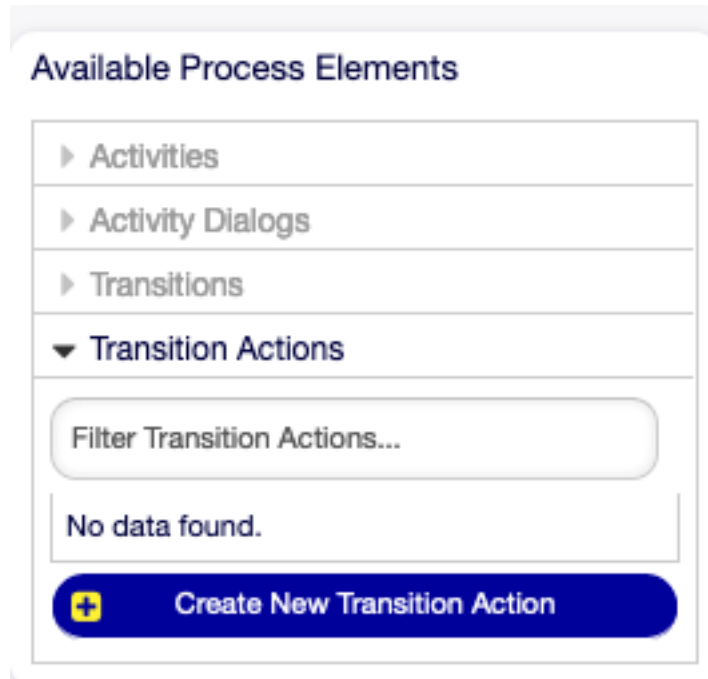
\*\*\*\*\*

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.

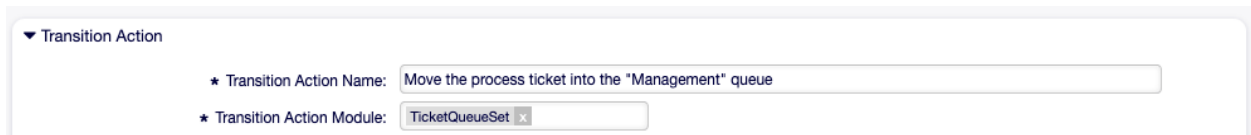
:

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:

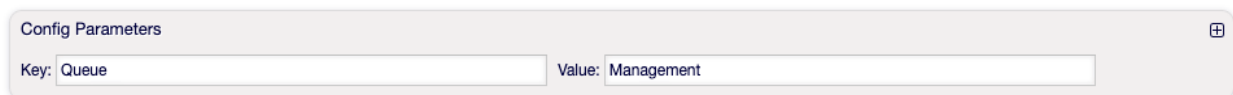
- DynamicFieldSet
- TicketArticleCreate
- TicketCreate
- TicketCustomerSet
- TicketLockSet
- TicketOwnerSet
- TicketQueueSet
- TicketResponsibleSet



1.205: Book Ordering - Transition Actions



1.206: Book Ordering - Add Transition Action



1.207: 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` (10000000)
  - To be executed when the transition Approval applied.
- `ManagerApproval`
  - To be executed when the transition Approval applied.
- `EmployeesApproval`
  - `EmployeesApproval`
    - The transition Approval denied applied.
    - The transition Order denied applied.
    - The transition Shipment received applied.
- `EmployeeApproval`
  - `EmployeeApproval`
    - The transition Approval denied applied.
    - The transition Order denied applied.
    - The transition Shipment received applied.
- `PurchasingApproval`
  - To be executed when the transition Approved applied.
- `Post officeApproval`
  - To be executed when the transition Order placed applied.
- `ShipmentReceived`
  - To be executed when the transition Shipment received applied.
- `ApprovalDenied`
  - `ApprovalDenied`
    - 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.

Figure 1.208

Figure 1.208 shows the Available Process Elements dialog box.

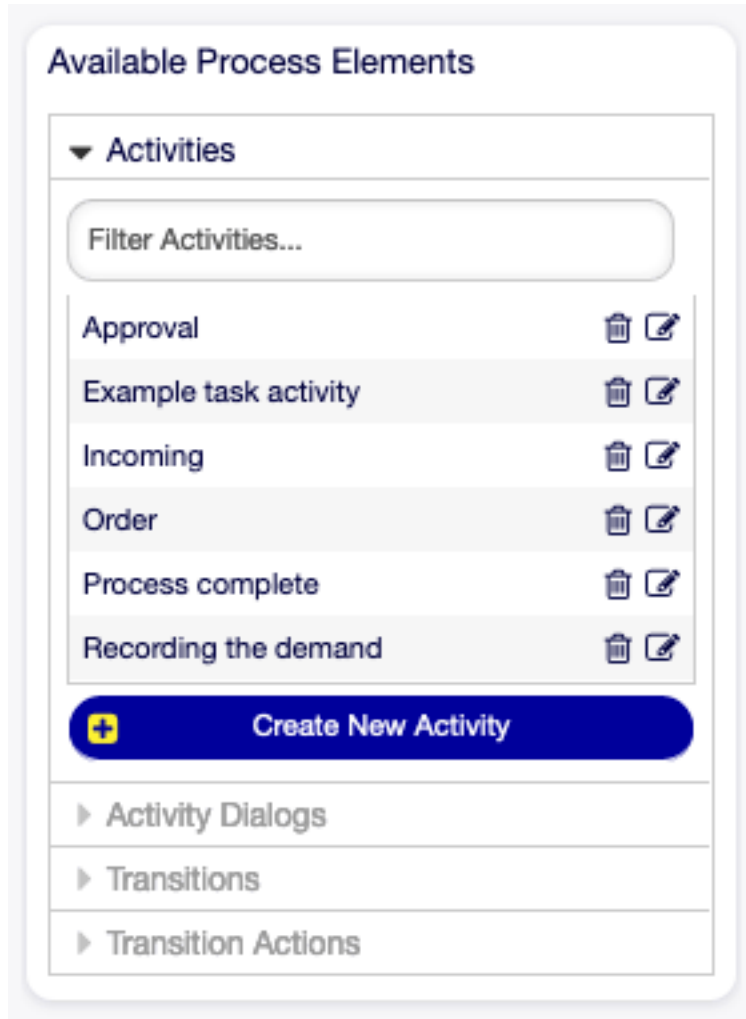


Figure 1.208: Available Process Elements

Figure 1.209 shows the Assigned Activity Dialogs dialog box.

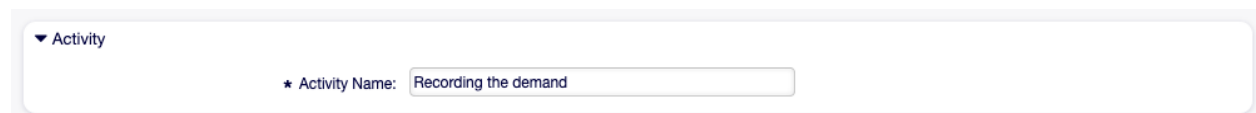


Figure 1.209: Assigned Activity Dialogs

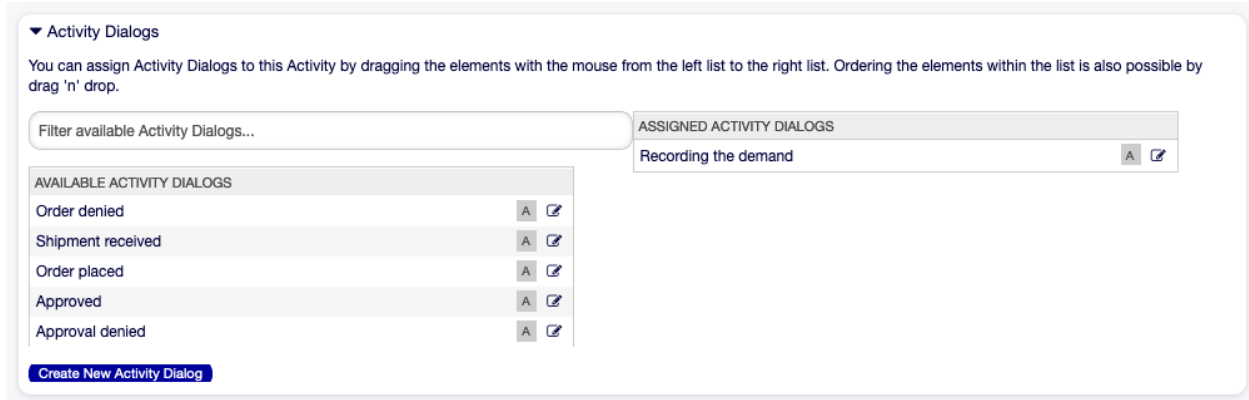
To assign dialogs to the activity simple drag the required dialogs from the Available Activity Dialogs pool and drop into the Assigned Activity Dialogs pool. The order in the Assigned Activity Dialogs pool is the order as the dialogs will be presented in the Ticket Zoom screen. To modify the order simply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

Note: 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.



1.210: 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.

1.211: Book Ordering - Assign Activity Dialog

- 1.212: Book Ordering - Assign Activity Dialog  
Assign the activity dialog Recording the demand.
- 1.213: Book Ordering - Assign Activity Dialog  
Assign the activity dialogs Approval denied and Approved.
- 1.214: Book Ordering - Assign Activity Dialog  
Assign the activity dialogs Order denied and Order placed.
- 1.215: Book Ordering - Assign Activity Dialog  
Assign the activity dialog Shipment received.
- 1.216: Book Ordering - Assign Activity Dialog  
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.

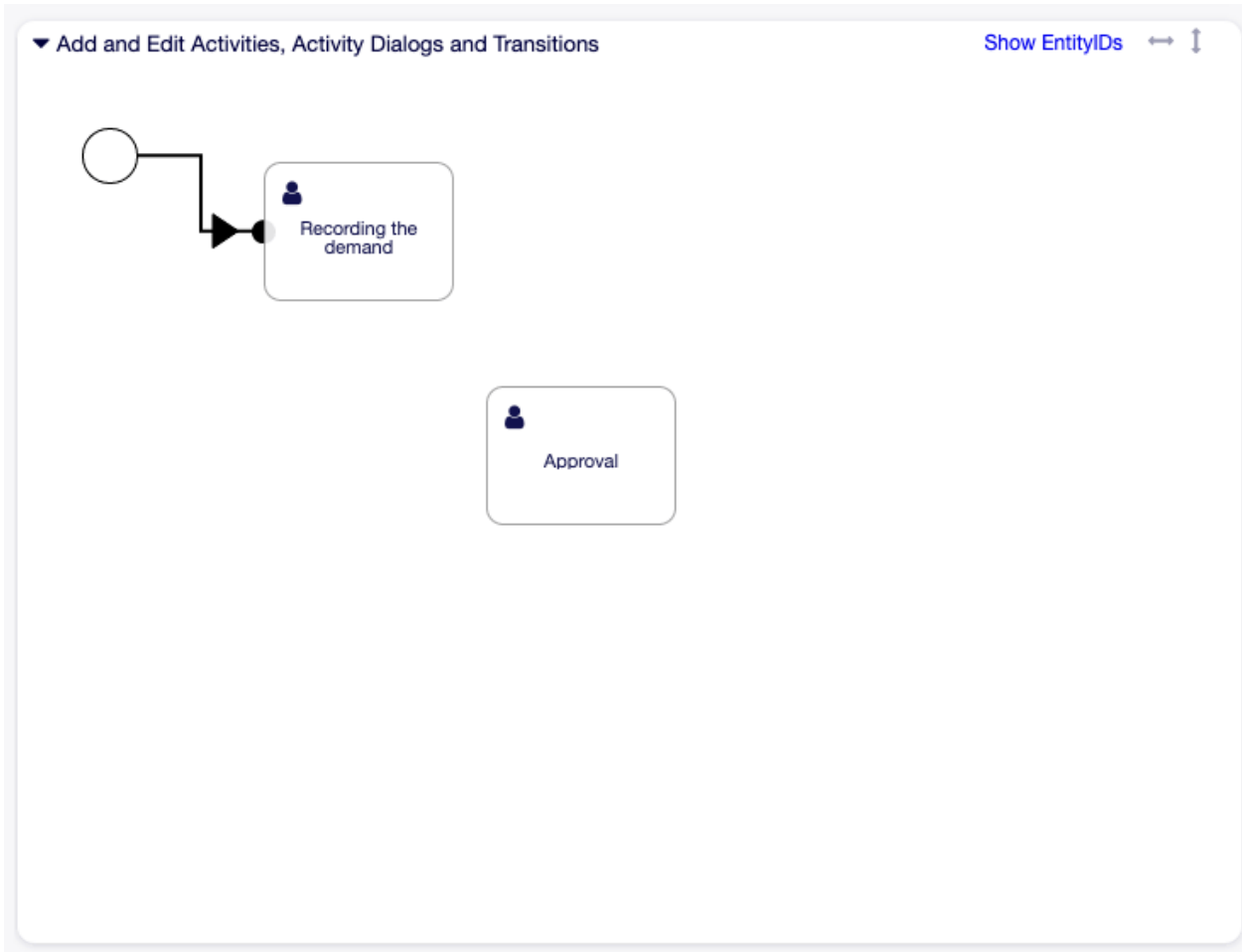
Now we can clearly see that activities are precisely defined states of a process ticket. After a successful transition a process ticket moves from one activity to another.

1.217: Book Ordering - Assign Activity Dialog

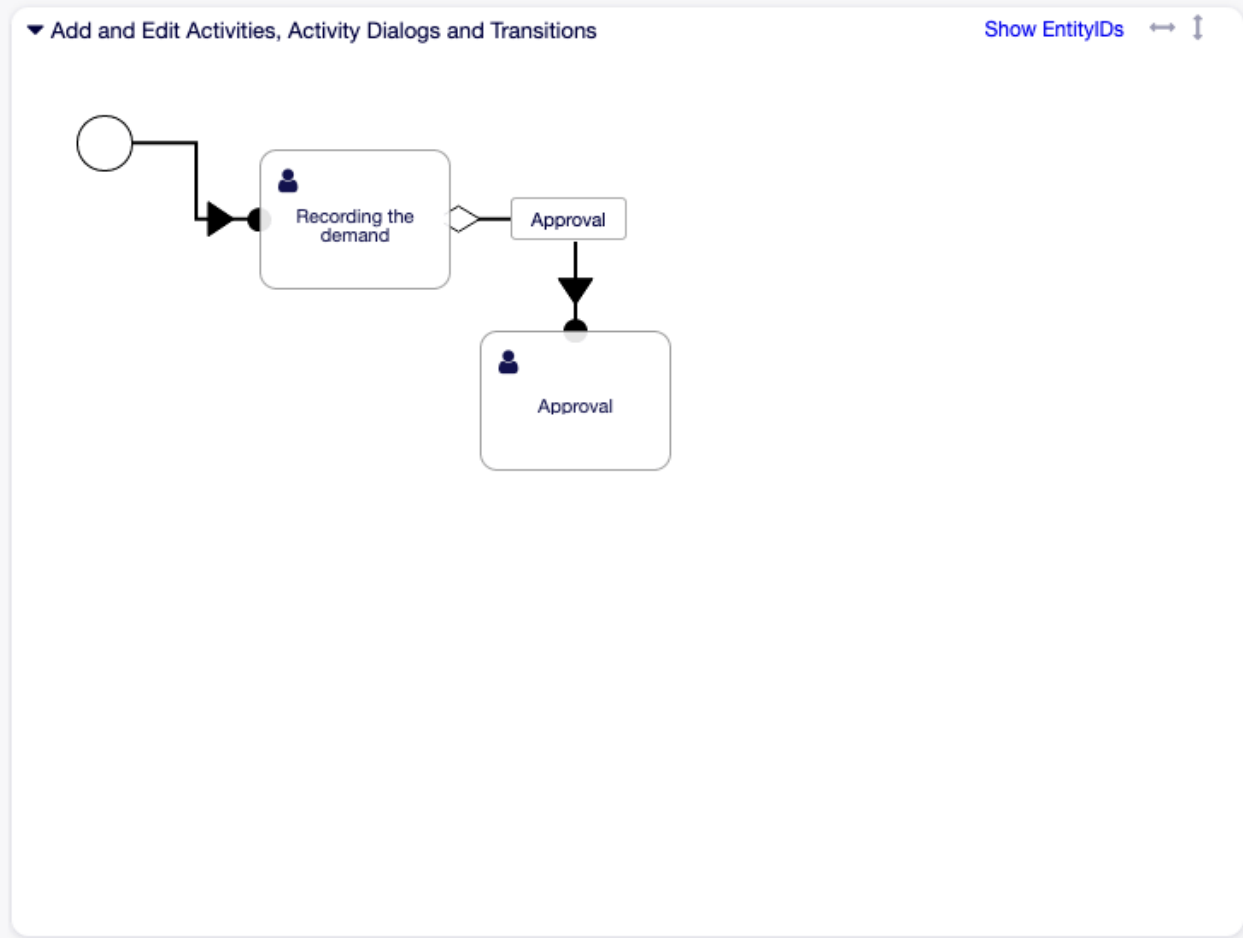
Let us conclude our example with the last missing piece in the puzzle, the process as a flow describer. In our case this is the whole ordering workflow. Other processes could be office supply ordering or completely different processes.

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.





1.212: Recording the demand - Approval



1.213: 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](#)

1.214: Book Ordering - Assign First Transition Action



- Employees
- Employee
- 

Possible transition: Order placed

Additionally, the following transition actions are executed:

- Post office

- 

Possible transition: Shipment received

Additionally, the following transition actions are executed:

- Employees
- Employee
- 

Per

---

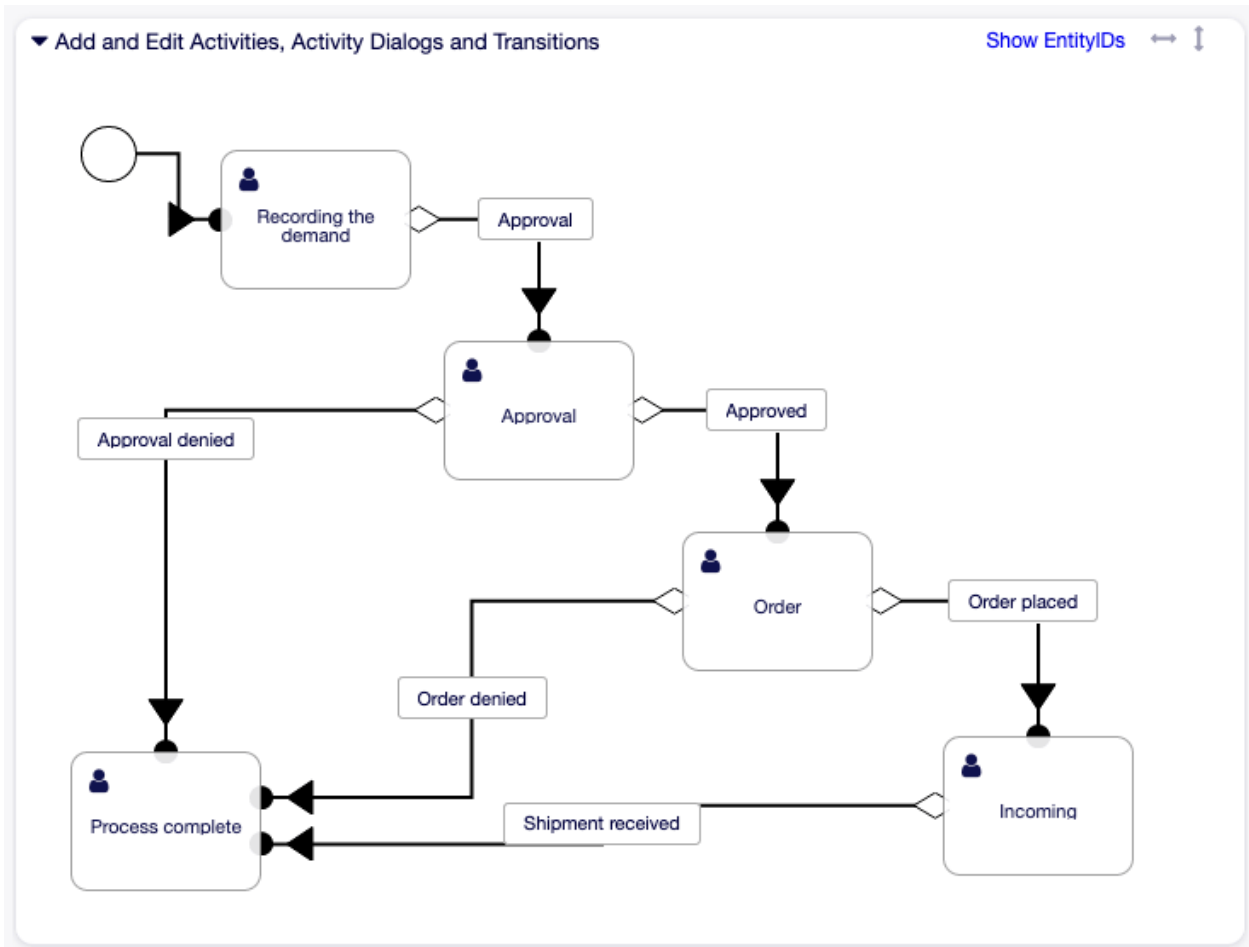
---

### 1.4.5 Ticket Masks

### 1.4.6 Web

- CRM
- 
- 
- 

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.



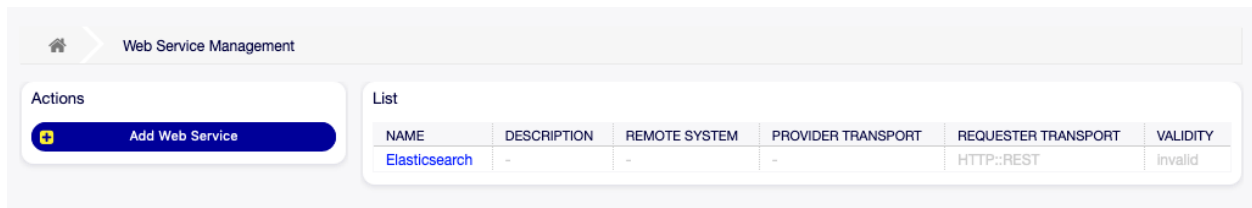
1.215: 11.0 - 11.0

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.

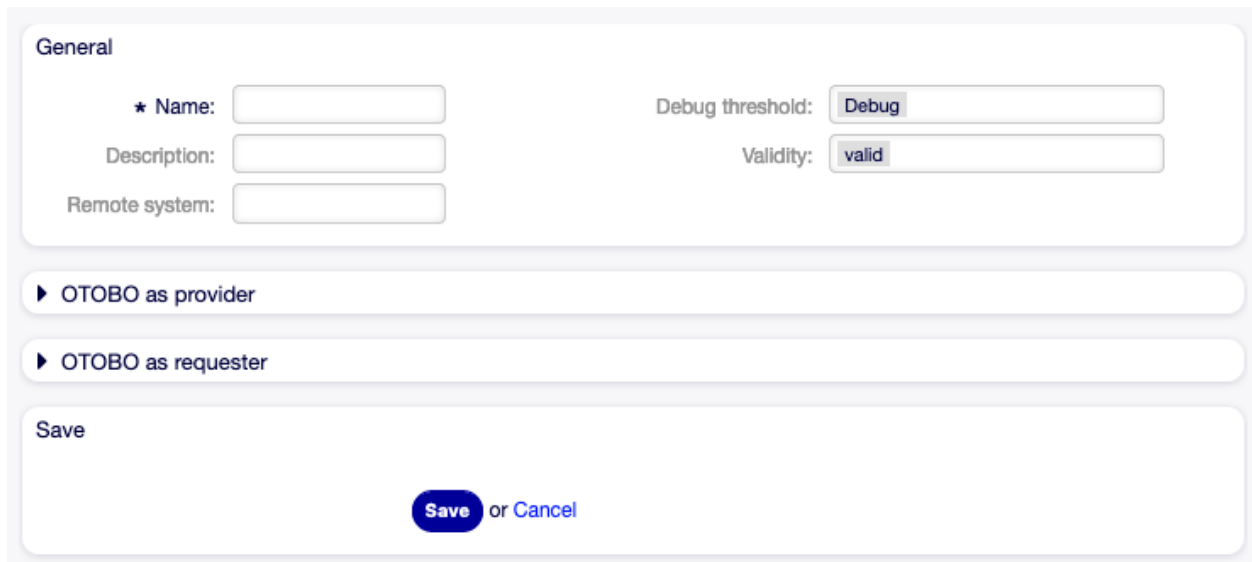


1.216: Web Service Management

## Web Service

### Web Service Configuration

1. Click on the 'Add Web Service' button.
2. Fill-in the required fields.
3. Click on the 'Save' button.



1.217: Web Service Configuration



Web

1. Web Web
- 2.
- 3.

**General**

★ Name:  Debug threshold:

Description:  Validity:

Remote system:

▶ OTOBO as provider

▶ OTOBO as requester

Save

or  or

1.218: Web

Web

1. Web Web
2. Web
- 3.

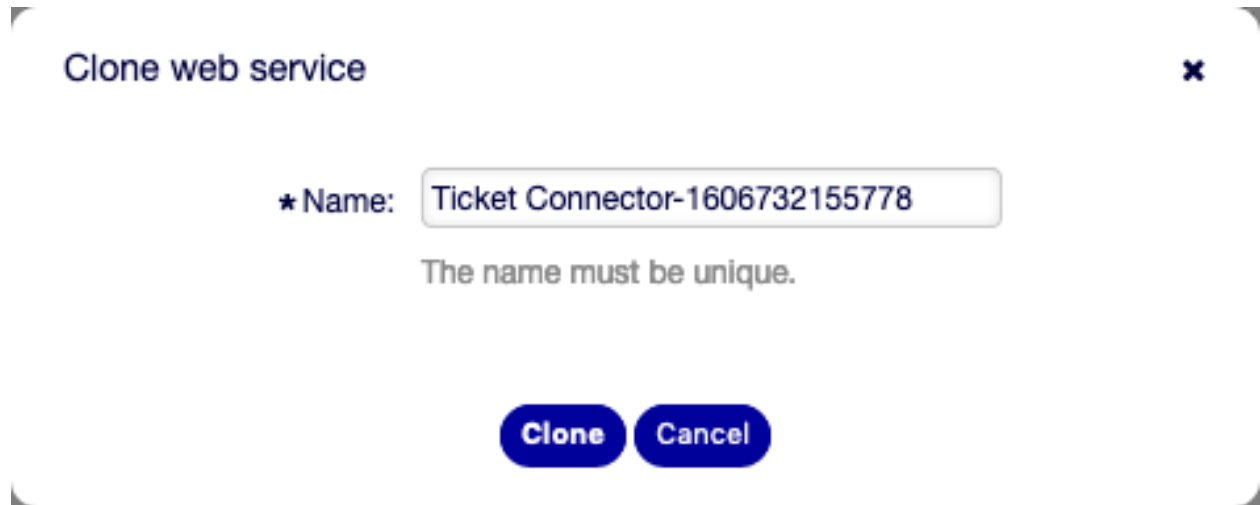
**Delete web service** ✕

Do you really want to delete this web service?

1.219: Web

Web

1. Web Web
2. Web
3. Web



1.220: Web

Web

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

WEB

Web

1. 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.

1.221: Web

Web

1. Web
2. Web

Web

1. Web
2. Web
3. 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](#)

1.222: Web

4. .yaml
5. Web
- 6.

Web

Web

### General

**\* Name:**

**Description:**

**Remote system:**

**Debug threshold:**

**Validity:**

1.223: Web -

\*

The default value is Debug. When configured in this manner, all communication logs are registered in the database. Each subsequent debug threshold value is more restrictive and discards communication logs of lower order than the one set in the system.

- 
- Debug
  - Info

- Notice
- Error

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

**Web**

To access the otobo webservice, please use the following URL: <https://SERVERADDRESS/otobo/nph-genericinterface.pl/Webservice/WEBSERVICENAME/OPERATION>

▼ 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.				

1.224: Web Service Settings - OTOBO as Provider

Select which network transport you would like to use with the web service. Possible values are HTTP::REST and HTTP::SOAP.

After selecting the transport method, you have to save the configuration by clicking on 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 Provider - HTTP::REST and OTOBO as Provider - 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 configuration.

**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**

1.225: Web Service Settings - OTOBO as Provider - Operation

### 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”

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](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](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](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](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](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

### 1.5

TODO: This part of the documentation is out of scope and needs someone to help updating the changes introduced with the latest releases.

OTOBO provides access to create and manage demands, as well as receive valuable information such as the service catalog and knowledge base.

#### 1.5.1

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

Use this screen to add categories and items for use in external interface. A fresh OTOBO installation doesn't contain any categories or items by default. The catalogue management screen is available in the Customer Service Catalogue module of the External Interface group.

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 [Cancel](#)

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





▼ 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](#)

1.229: 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 [Cancel](#)

Customer Service Catalogue

Actions


- Go to category management
- Go to item management

Customer Service Catalogue



**Category Management**

Manage customer service catalogue categories.



**Item Management**

Manage customer service catalogue items.

1.231: 

Customer Service Catalogue > Category Management

Actions

- Add Category
- Go to item management


Filter for Categories

Just start typing to filter...

Filter for Languages

English (United States)

List

TITLE	LANGUAGE	VALIDITY	DELETE	CHANGED	CREATED
Test Category	English (United States)	valid		11/05/2018 17:15	11/05/2018 17:15

1.232: 

Add Category

★ Title:

Sub-category of:

★ Language:

★ Validity:

1.233: 

Edit Category

★ Title:

Sub-category of:

★ Language:

★ Validity:

1.234: 

List

TITLE	LANGUAGE	VALIDITY	DELETE	CHANGED	CREATED
Test Category	English (United States)	valid		11/05/2018 17:15	11/05/2018 17:15

1.235:

Customer Service Catalogue > Item Management > Edit Item: Test Item

Actions: [Go to overview](#)

Edit Item

★ Internal Title:

★ Validity:

Item Content

English (United States)

★ Title:

★ Text:

Categories:

★ Link:

Add new item content:

Save Changes

or  or

1.236:

- 1.
- 2.
- 3.

Add Item


★ Internal Title:

★ Validity:

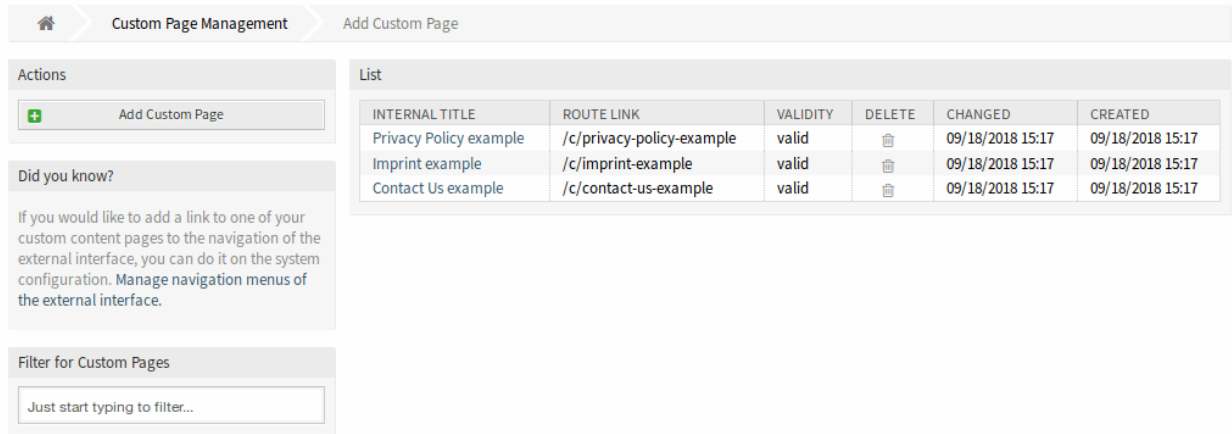
1.237:



### 1.5.2

: 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](mailto: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.



The screenshot shows the 'Custom Page Management' interface. At the top, there is a breadcrumb 'Custom Page Management > Add Custom Page'. Below this, there are three main sections:



- Actions:** Contains a button labeled 'Add Custom Page' with a plus icon.
- Did you know?:** A text box providing information: 'If you would like to add a link to one of your custom content pages to the navigation of the external interface, you can do it on the system configuration. Manage navigation menus of the external interface.'
- Filter for Custom Pages:** A search input field with the placeholder text 'Just start typing to filter...'.

On the right side, there is a 'List' table with the following data:


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

### 1.240:




#### 

: 



#### 

1. 
2. 
3. 

#### 

1. 
2. 
3. 

#### 

1. 
2. 

: 



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

1.241: ██████████

**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 | | | | | | | |

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

1.242:

**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

1.243:

### Annotations

Annotations are used to describe resources in OTOBO.

Annotations \* Annotations are used to describe resources in OTOBO.

**Slug \*** Annotations are used to describe resources in OTOBO.

Annotations \* 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.

Annotations are used to describe resources in OTOBO.

Annotations \* Annotations are used to describe resources in OTOBO.

Annotations \* Annotations are used to describe resources in OTOBO.

Annotations are used to describe resources in OTOBO.

### 1.5.3 Annotations

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

Annotations are used to describe resources in OTOBO.

Annotations are used to describe resources in OTOBO.

Annotations: Annotations are used to describe resources in OTOBO.

Annotations are used to describe resources in OTOBO.

### Annotations

Annotations are used to describe resources in OTOBO.

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- Annotations
- Annotations
- Annotations

Annotations are used to describe resources in OTOBO.

Annotations are used to describe resources in OTOBO.

### Annotations

Annotations are used to describe resources in OTOBO.

Annotations are used to describe resources in OTOBO.

### Hero Unit

**Title**

**Background Style**

**Background Image**

**Background Color**

▼

1.244: Hero Unit

### Ticket List

**Show a ticket list for logged in users**

**Row Title**

1.245: Ticket List



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

1.247:

**Link Lists** Add

Row Title

1.248:

**★ Title** ☰

**Link Text (for the show more link)**

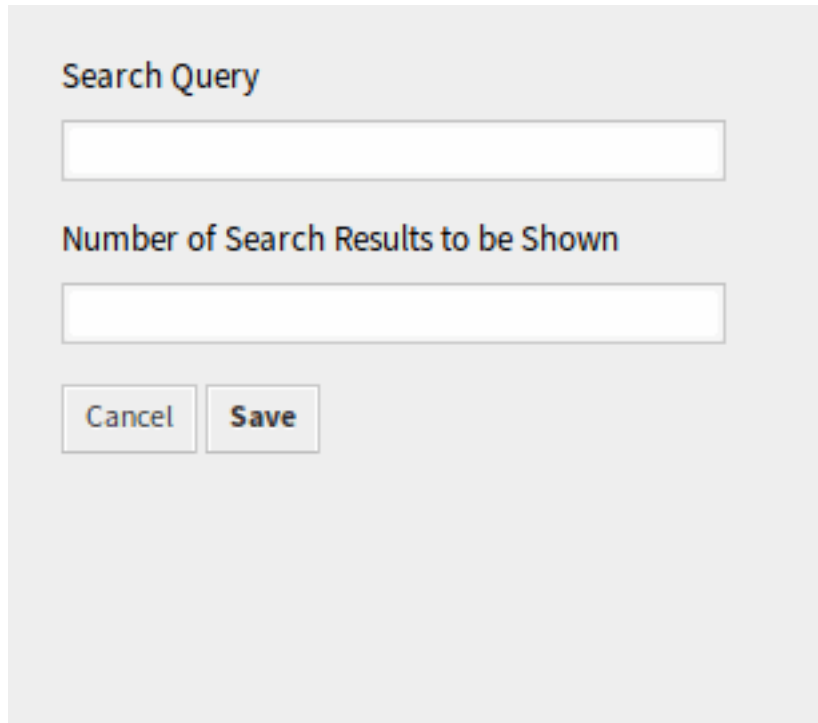
**Link Target (for the show more link)**

**★ Link List Type**

1.249: 1.249


<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	+

1.250: 1.250



A dialog box with a light gray background. At the top, the text "Search Query" is displayed in a bold font. Below it is a white rectangular input field. Underneath the input field, the text "Number of Search Results to be Shown" is displayed in a bold font. Below this text is another white rectangular input field. At the bottom of the dialog box, there are two buttons: "Cancel" on the left and "Save" on the right, both with a light gray background and a thin border.

1.251: Search Query



A dialog box with a light gray background. The title "Content Cards" is located at the top left in a bold font. At the top right, there is a button labeled "Add" with a light gray background and a thin border. Below the title, the text "Row Title" is displayed in a bold font. Underneath "Row Title" is a white rectangular input field.

1.252: Content Cards



OTRS Administration Manual

★ Title
☰

Add Helpful Resources for your Users

★ Text
☰

With OTRS 7, you can add even more helpful resources for your users like frequently asked

**Link Text**

Manage Teaser Cards for the Home Page

**Link Target**

/otrs/index.pl?Action=AdminExternalHomePage

★ Link List Type
☰

Add the Items Manually
✎

1.253: Screenshot

OTRS \* Administration Manual

OTRS \* Administration Manual

OTRS Administration Manual

OTRS Administration Manual URL

### 1.5.4 OTRS

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


OTRS Administration Manual

A fresh OTOBO installation already contains a default layout. In this screen all parameters can be changed.

Edit Layout


**Logo**

Select image to upload



**Favicon**

Select image to upload



Will be displayed in the browser address bar.

**Primary Color**


Will be used as background color for certain areas (e.g. buttons, header) and link hover color.

**Highlight Color**

Will be used as background or border color for certain areas (e.g. status badges).

**Default Avatar**

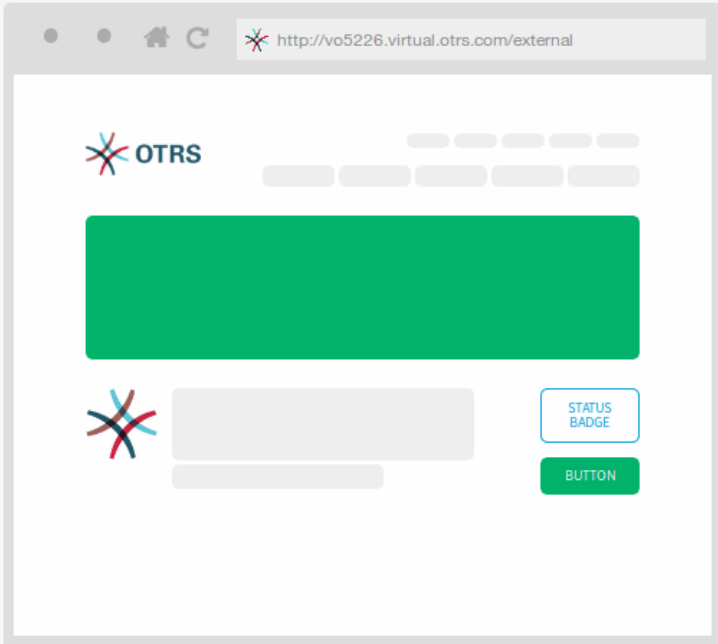
Select image to upload



Will be used as the default avatar for all outgoing communication.

**Preview**

Make changes to your layout on the left and preview them here.



1.254: 11111111



- WebApp::Server::AdditionalOrigins

### 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

:

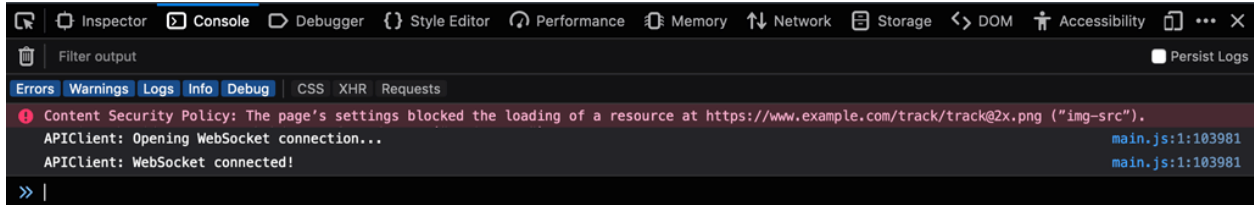
- 1.
2. ExternalFrontend::ExternalScripts
- 3.
- 4.
5. https://www.example.com/track/js?id=UA-XXXXXX-Y
- 6.
- 7.

- 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');
```





### 1.257: `<img src="" />`

`<img src="" />` is a valid HTML element. However, the browser's Content Security Policy (CSP) blocks the loading of the resource at `https://www.example.com/track/track@2x.png` because the `img-src` directive is not properly configured.

1. `<img src="" />` is a valid HTML element.
2. `WebApp::Server::AdditionalOrigins`
3. `<img src="" />`
4. `img-src` directive is not properly configured.
5. `Content Security Policy: The page's settings blocked the loading of a resource at https://www.example.com/track/track@2x.png ("img-src").`
6. `<img src="" />`
7. `<img src="" />`

`<img src="" />` is a valid HTML element. However, the browser's Content Security Policy (CSP) blocks the loading of the resource at `https://www.example.com/track/track@2x.png` because the `img-src` directive is not properly configured.

`<img src="" />` is a valid HTML element. However, the browser's Content Security Policy (CSP) blocks the loading of the resource at `https://www.example.com/track/track@2x.png` because the `img-src` directive is not properly configured.

`<img src="" />` is a valid HTML element. However, the browser's Content Security Policy (CSP) blocks the loading of the resource at `https://www.example.com/track/track@2x.png` because the `img-src` directive is not properly configured.

**⚠️:** 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!

## 1.6 Rother OSS Services

`<img src="" />` is a valid HTML element. However, the browser's Content Security Policy (CSP) blocks the loading of the resource at `https://www.example.com/track/track@2x.png` because the `img-src` directive is not properly configured.

The following chapter describes the tools you have available to integrate your system with the powerful cloud service offered by Rother OSS.

### 1.6.1 `<img src="" />`

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



Configuration

Name: SMS

★ Phone field for agent:   
 Agent data field from which the mobile phone number for sending messages via SMS should be taken.

★ Phone field for customer:   
 Customer data field from which the mobile phone number for sending messages via SMS should be taken.

★ Sender string:   
 Will be shown as sender name of the SMS (Not longer than 11 characters).

Allowed role members:   
 If selected, only agents assigned to these roles will be able to receive notifications via SMS (optional).

Perform URL shortening:   
 Perform URL shortening before sending the message.

Phone black list:   
 A blacklist of telephone numbers where it is forbidden to send SMS messages to. Phone numbers must be added in international format without spaces, e.g. +491791234567, one number per field.

Comment:

Validity:

In order to be able to use the SMS transmission feature of the OTRS  
 AG, I hereby declare that I have read and understood the [Data Protection Information](#).

or

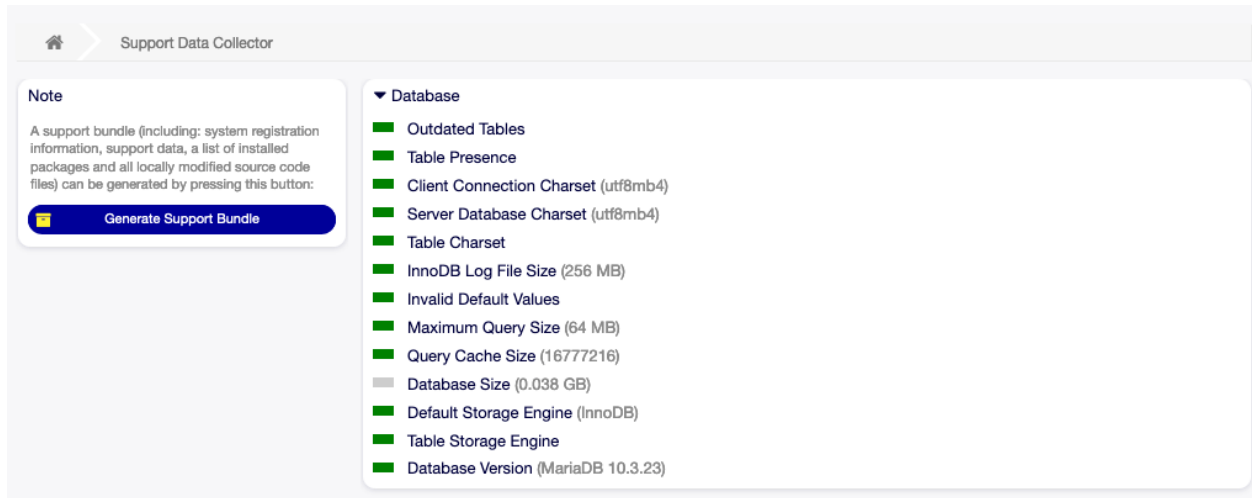
1.259: 11.0



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.

### 1.6.2

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.



1.260: Screenshot

#### 1.6.2.1

Support data collector is used to collect some data and sent to Rother OSS on a regular basis, if the system is registered. To register your system:

1. Open the 'System' menu
2. Select 'Registration'

#### 1.6.2.1.1

1. Enter the 'System ID' and 'License Key'
2. Click on 'Register System'

#### 1.6.2.1.2

1. Open the 'System' menu

#### 1.6.2.1.3

1. Open the 'System' menu
2. Select 'Registration'
3. Select 'Registration Status'

## 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**

1.261: ██████████

OTOBOS

OTOBOS

- OTOBOS
- OTOBOS
- OTOBOS
- OTOBOS

OTOBOS

This section displays information about OTOBO cloud services.

OTOBOS

OTOBOS

This section displays information about the database used by OTOBO.

OTOBOS

OTOBOS

OTOBOS utf8

OTOBOS utf8

OTOBOS utf8

InnoDB InnoDB 512 MB

OTOBOS

OTOBOS 1024 MB

OTOBOS

OTOBOS InnoDB

OTOBOS InnoDB

OTOBOS

OTOBOS

OTOBOS

OTOBOS

OTOBOS

OTOBOS

OTOBOS

OTOBOS

OTOBODISK

OTOBODISK

OTOBODISK

**OTOBO Disk Partition** Display the disk partition to where OTOBO is installed.

OTOBODISK

OTOBODISK

OTOBODISK

OTOBODISK CPU8 CPU8

**Perf** Perf

(%) 60%

(MB) 200 MB

### OTOBO Section

This section displays information about the OTOBO instance.

OTOBODISK

OTOBODISK

OTOBODISK

OTOBODISK 24 24

OTOBODISK

OTOBODISK

OTOBODISK

OTOBODISK Display whether the OTOBO daemon is running or not.

OTOBODISK Display the main OTOBO object and the related number of records in the database.

OTOBODISK LED

OTOBODISK

OTOBODISK Display the fully qualified domain name set in system configuration setting FQDN.

OTOBODISK

OTOBODISK LED

OTOBODISK LED

OTOBODISK Green LED means, that the OTOBO framework version is suitable for the installed packages.

OTOBODISK Green LED means, that all installed packages are verified by the Rother OSS.

OTOBODISK

OTOBODISK

OTOBODISK Display the system identifier set in system configuration setting SystemID.

OTOBODISK Display the ticket index module set in system configuration setting Ticket::IndexModule.

Display the ticket search index module set in system configuration setting

Ticket::SearchIndex::ForceUnfilteredStorage.

Display the ticket search index module set in system configuration setting  
Ticket::SearchIndex::ForceUnfilteredStorage.

**ticket\_index** Display the ticket\_index module set in system configuration setting

**ticket\_lock\_index** Display the ticket\_lock\_index module set in system configuration setting

Display timezone information for OTOBO, for the calendars and for users.

Display - Display timezone information for OTOBO, for the calendars and for users.

Display - Display timezone information for OTOBO, for the calendars and for users.

Display - Display timezone information for OTOBO, for the calendars and for users.

**OTOBO Version** Display the version number of OTOBO.

## 1.7 Administration

OTOBO offers several administration tools to configure, monitor, control and extend OTOBO.

OTOBO offers several administration tools to configure, monitor, control and extend OTOBO.

### 1.7.1 Calendars

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

OTOBO supports this requirement with calendars. Calendars allow management of appointments and resources inside the ticket system. You can connect your tickets to scheduled tasks and make them available to all users to see. This feature adds transparency to show your 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.

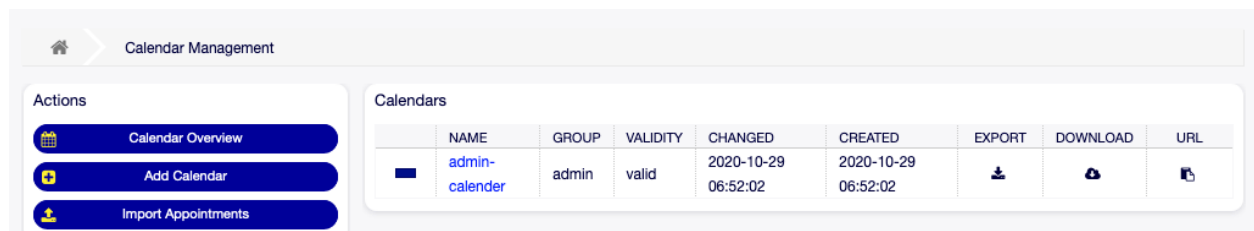


Figure 1.262: Calendar Management

Calendars

Calendars

1. Add Calendar
2. Import Appointments



Field: [Placeholder]

Field

[Placeholder]

Field

Field \* [Placeholder]

Field \* [Placeholder]

[Placeholder]

Field \* [Placeholder]

[Placeholder]

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

Field \* 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.

Field

[Placeholder]

**▼ Ticket Appointments**

**Rule 1** ⊖

---

Start date:

End date:

Use options below to narrow down for which tickets appointments will be automatically created.

★ Queues:  x

Search attributes:  ⊕

Define rules for creating automatic appointments in this calendar based on ticket data.

+ Add Rule

1.265: [Placeholder] - [Placeholder]





FAQ Category Management

Actions

**Add category**

NAME	VALIDITY	DELETE
Misc	valid	

1.267: FAQ

- 1.
- 2.
- 3.

**Add Category**

**\* Name:**

Subcategory of:

**\* Permission:**

Agent groups that can access articles in this category.

Validity:

**\* Comment:**

Will be shown as comment in Explorer.

**Submit** or **Cancel**

1.268:

- 1.
- 2.
- 3.

- 1.
- 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.

or [Cancel](#)

1.269: 1.269

**List**

NAME	VALIDITY	DELETE
Misc	valid	

1.270: 1.270



Edit Language

\* Name:

**Submit** or Cancel

1.273: Screenshot

List

NAME	DELETE
de	
en	

1.274: Screenshot

## FAQ

.....

\* ISO 639-1

## 1.7.4 Import/Export

### 1.7.5

.....

OTOBO uses a package manager to perform all package-related activities as mentioned above in the graphical interface.

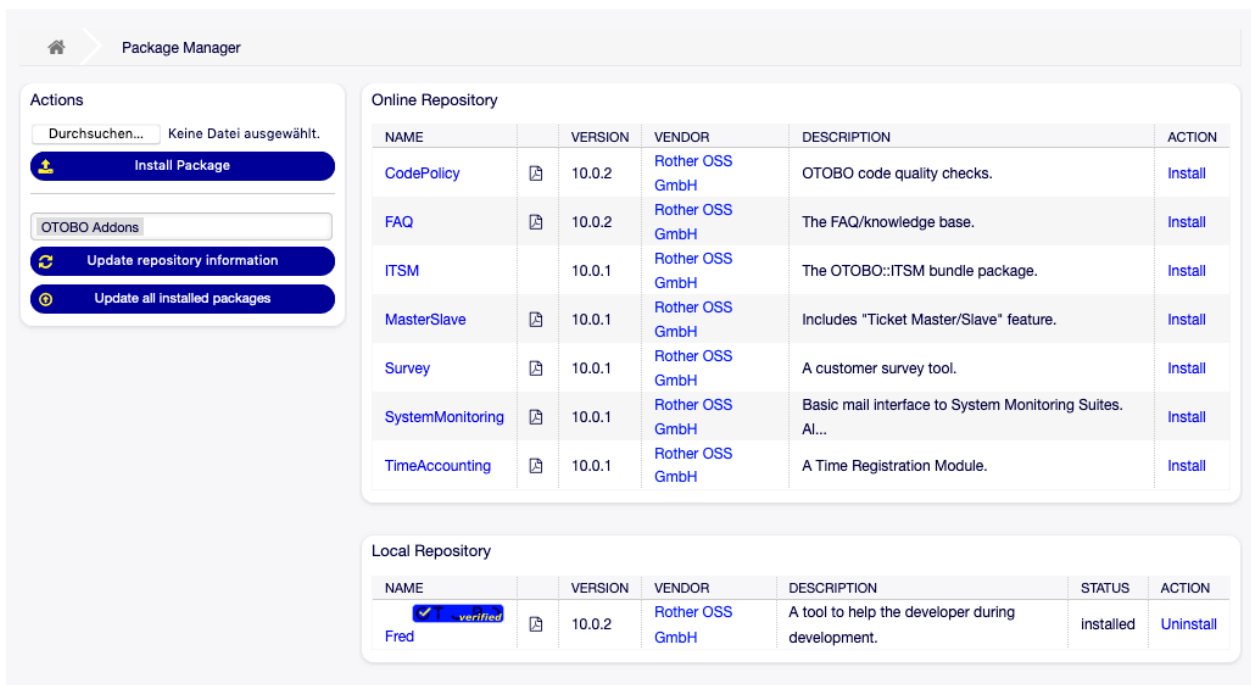
Use this screen to install and manage packages that extend the functionality of OTOBO. The package manager screen is available in the Package Manager module of the Administration group.

.....

The installation of packages which are not verified by Rother OSS is possible by default, cause we love open source.

.....

You can deactivate the installation of not verified packages in the system configuration setting `Package::AllowNotVerifiedPackages`.



1.275:

- 1.
- 2.
- 3.
- 4.
- 5.

The repository list can be changed in system configuration setting `Package::RepositoryList`.

- 1.
- 2.
- 3.
- 4.
- 5.

- 1.

Online Repository

NAME		VERSION	VENDOR	DESCRIPTION	ACTION
<a href="#">CodePolicy</a>		10.0.2	<a href="#">Rother OSS GmbH</a>	OTOBO code quality checks.	<a href="#">Install</a>
<a href="#">FAQ</a>		10.0.2	<a href="#">Rother OSS GmbH</a>	The FAQ/knowledge base.	<a href="#">Install</a>
<a href="#">ITSM</a>		10.0.1	<a href="#">Rother OSS GmbH</a>	The OTOBO::ITSM bundle package.	<a href="#">Install</a>
<a href="#">MasterSlave</a>		10.0.1	<a href="#">Rother OSS GmbH</a>	Includes "Ticket Master/Slave" feature.	<a href="#">Install</a>
<a href="#">Survey</a>		10.0.1	<a href="#">Rother OSS GmbH</a>	A customer survey tool.	<a href="#">Install</a>
<a href="#">SystemMonitoring</a>		10.0.1	<a href="#">Rother OSS GmbH</a>	Basic mail interface to System Monitoring Suites. AI...	<a href="#">Install</a>
<a href="#">TimeAccounting</a>		10.0.1	<a href="#">Rother OSS GmbH</a>	A Time Registration Module.	<a href="#">Install</a>

1.276: Online Repository

Local Repository

NAME		VERSION	VENDOR	DESCRIPTION	STATUS	ACTION
<a href="#">Fred</a>		10.0.2	<a href="#">Rother OSS GmbH</a>	A tool to help the developer during development.	installed	<a href="#">Uninstall</a>

1.277: Local Repository

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

6.

1. 7.
2. 8. .opm 9.
3. 10.
4. 11.
5. 12.

13.

1. 14.
2. 15.
3. 16.

17.

18.

19.

20.


21.

1. 22.
2. 23.
3. 24.

25.

26.

1. 27.
2. 28.
3. 29.

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	

30. 1.278: 31.

### 1.7.6 Performance Log

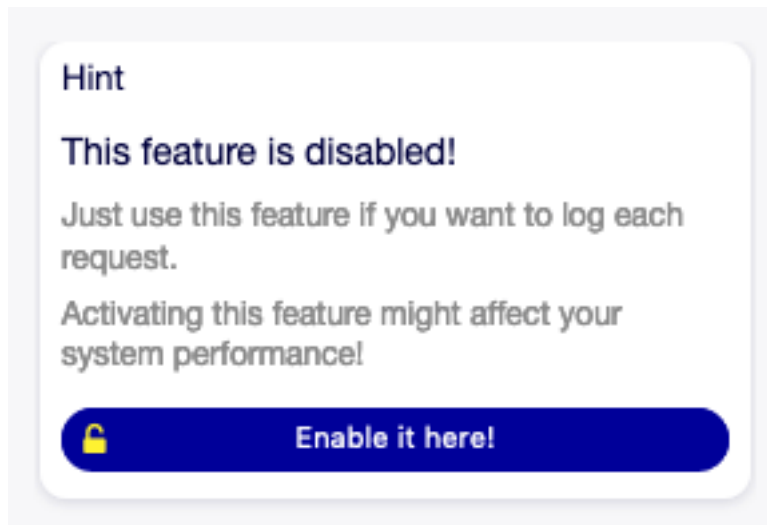
Web applications can be configured to log each request. This feature is disabled by default.

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.

---

ⓘ: To be able to see performance log in OTOBO, you have to enable its setting first.



1.279: Performance Log

---

If the performance log is enabled, OTOBO collects all the information about requests and responses in an overview table.

Web applications can be configured to log each request.

### 1.7.7 Session Management

Web applications can be configured to log each request.

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.

Web applications can be configured to log each request.

Web applications can be configured to log each request.

Web applications can be configured to log each request.

1. Web applications can be configured to log each request.
2. Web applications can be configured to log each request.
3. Web applications can be configured to log each request.



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

1.280: 000000

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	

1.281: ██████████

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
<a href="#">PrGkP1RAnLx5FRmhBkJ64V07Cn6ARg</a>	Agent	Super Admin	<a href="#">Kill this session</a>
<a href="#">vXbyfpYO8avQnFZZciDWRliGrSMBJx11</a>	Agent	Admin OTOBO	<a href="#">Kill this session</a>
<a href="#">xq0HHjd0EwvF2ucwjaCL8R1CBBwKadbV</a>	Agent	Admin OTOBO	<a href="#">Kill this session</a>

1.282: ████████

Detail View for SessionID: PrGkP1RAnLxx5FRmhBkJ64V07Cn6ARg - Super Admin

KEY	VALUE
AdminCommunicationLogPageShown	25
AdminDynamicFieldsOverviewPageShown	25
ChangeTime	2020-11-02 12:01:47
CreateTime	2020-09-21 17:16:35
SessionID	PrGkP1RAnLxx5FRmhBkJ64V07Cn6ARg
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

1.283: ██████████

1. 1. 2. 3. 4. 5. 6. 7. 8. 9. 10. 11. 12. 13. 14. 15. 16. 17. 18. 19. 20. 21. 22. 23. 24. 25. 26. 27. 28. 29. 30. 31. 32. 33. 34. 35. 36. 37. 38. 39. 40. 41. 42. 43. 44. 45. 46. 47. 48. 49. 50. 51. 52. 53. 54. 55. 56. 57. 58. 59. 60. 61. 62. 63. 64. 65. 66. 67. 68. 69. 70. 71. 72. 73. 74. 75. 76. 77. 78. 79. 80. 81. 82. 83. 84. 85. 86. 87. 88. 89. 90. 91. 92. 93. 94. 95. 96. 97. 98. 99. 100.

1. 1. 2. 3. 4. 5. 6. 7. 8. 9. 10. 11. 12. 13. 14. 15. 16. 17. 18. 19. 20. 21. 22. 23. 24. 25. 26. 27. 28. 29. 30. 31. 32. 33. 34. 35. 36. 37. 38. 39. 40. 41. 42. 43. 44. 45. 46. 47. 48. 49. 50. 51. 52. 53. 54. 55. 56. 57. 58. 59. 60. 61. 62. 63. 64. 65. 66. 67. 68. 69. 70. 71. 72. 73. 74. 75. 76. 77. 78. 79. 80. 81. 82. 83. 84. 85. 86. 87. 88. 89. 90. 91. 92. 93. 94. 95. 96. 97. 98. 99. 100.
2. 1. 2. 3. 4. 5. 6. 7. 8. 9. 10. 11. 12. 13. 14. 15. 16. 17. 18. 19. 20. 21. 22. 23. 24. 25. 26. 27. 28. 29. 30. 31. 32. 33. 34. 35. 36. 37. 38. 39. 40. 41. 42. 43. 44. 45. 46. 47. 48. 49. 50. 51. 52. 53. 54. 55. 56. 57. 58. 59. 60. 61. 62. 63. 64. 65. 66. 67. 68. 69. 70. 71. 72. 73. 74. 75. 76. 77. 78. 79. 80. 81. 82. 83. 84. 85. 86. 87. 88. 89. 90. 91. 92. 93. 94. 95. 96. 97. 98. 99. 100.

| SESSION                          | TYPE  | USER        | KILL                              |
|----------------------------------|-------|-------------|-----------------------------------|
| PrGkP1RAnLxx5FRmhBkNJ64V07Cn6ARg | Agent | Super Admin | <a href="#">Kill this session</a> |
| vXbyfpYO8avQnFZZciDWRiiGrSMBJx11 | Agent | Admin OTOBO | <a href="#">Kill this session</a> |
| xq0HHjd0EwvF2ucwjaCL8R1CBBwKadbV | Agent | Admin OTOBO | <a href="#">Kill this session</a> |

1.284: 1.284

1.284: 1.284

1.284: 1.284

1. 1. 2. 3. 4. 5. 6. 7. 8. 9. 10. 11. 12. 13. 14. 15. 16. 17. 18. 19. 20. 21. 22. 23. 24. 25. 26. 27. 28. 29. 30. 31. 32. 33. 34. 35. 36. 37. 38. 39. 40. 41. 42. 43. 44. 45. 46. 47. 48. 49. 50. 51. 52. 53. 54. 55. 56. 57. 58. 59. 60. 61. 62. 63. 64. 65. 66. 67. 68. 69. 70. 71. 72. 73. 74. 75. 76. 77. 78. 79. 80. 81. 82. 83. 84. 85. 86. 87. 88. 89. 90. 91. 92. 93. 94. 95. 96. 97. 98. 99. 100.

1.284: 1.284

1.284: 1.284

### 1.7.8 SQL

1.284: 1.284

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.

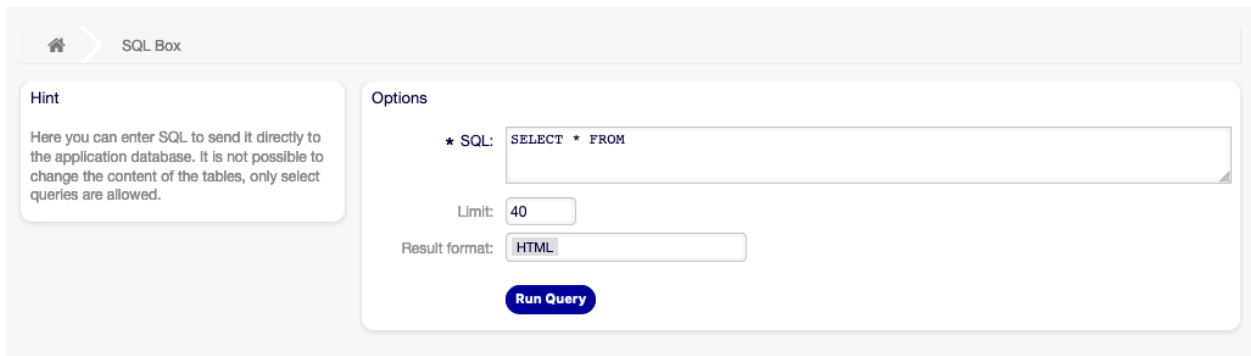
1.284: 1.284

#### SQL

1.284: 1.284

1.284: 1.284

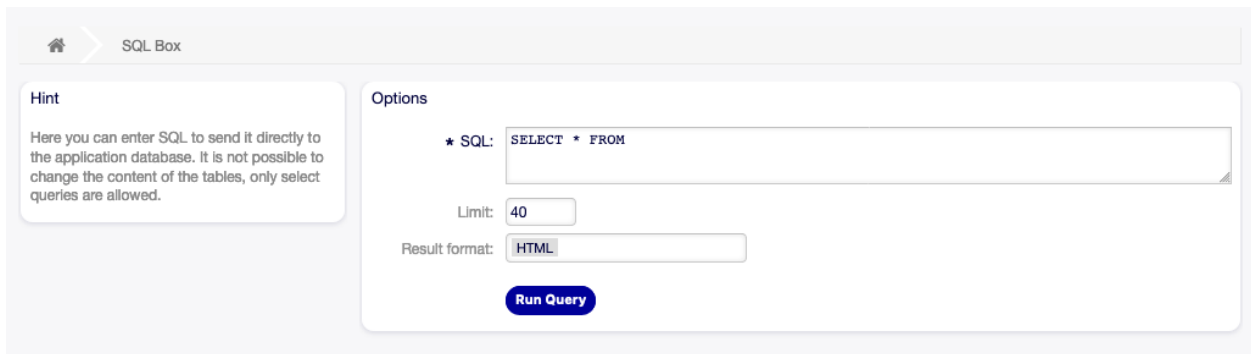
It is possible to modify the application database via SQL box. To do this, you have to enabled the system configuration setting AdminSelectBox : :AllowDatabaseModification. Activate it to your own risk!



1.285: SQL

SQL

1. SQL
- 2.
- 3.



1.286: SQL

SQL

SQL \* SQL

---

: SQL LIMIT

---

SQL

HTML SQL

CSV

Excel Microsoft Excel

## SQL

HTML

```
SELECT id, login , first_name, last_name, valid_id FROM users
```

2 Results

| ID | LOGIN          | FIRST_NAME | LAST_NAME | VALID_ID |
|----|----------------|------------|-----------|----------|
| 1  | root@localhost | Admin      | OTOBO     | 1        |
| 2  | sa             | Super      | Admin     | 1        |

1.287: SQL

```
SHOW TABLES
```

users

```
SELECT * FROM users
```

### 1.7.9

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.

:

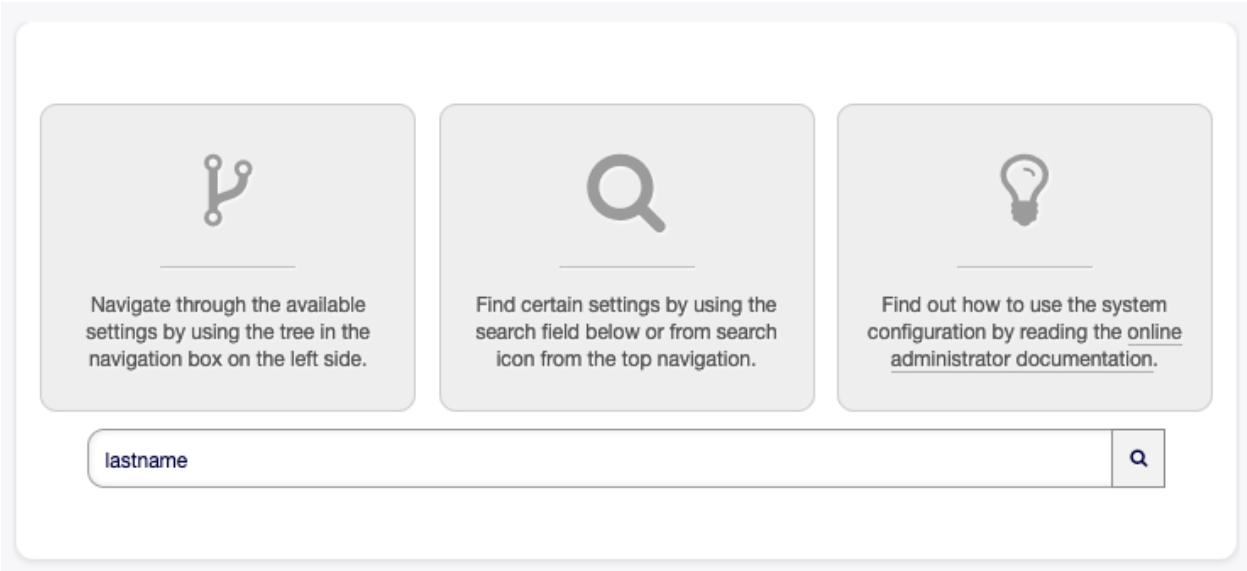
By using the System Configuration History package, you can easily roll back changes made by users. Contact [sales@otobo.de](mailto:sales@otobo.de) to add this feature to your system. In one of the next OTOBO releases this feature is included in the standard framework.

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.

Kernel/Config.pm

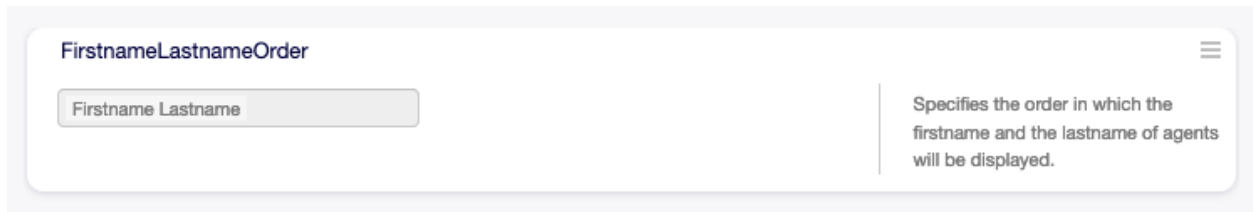
FirstnameLastnameOrder

1. lastname



1.288: 検索 - 検索

2. 検索結果を表示



1.289: 検索 - 検索

3. 検索結果を表示
4. 検索結果を絞り込む
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.

注意: If a setting is currently edited by another administrator, it is not possible to get access to the edit mode for that setting until the other administrator finished his work.

6. 検索結果を絞り込む
7. 検索結果を絞り込む
8. 検索結果を絞り込む
9. 検索結果を絞り込む
10. 検索結果を絞り込む
11. 検索結果を絞り込む
12. 検索結果を絞り込む

**FirstnameLastnameOrder** ☰

🕒 History
↺ Reset setting
🔗 Copy direct link
☆ Add to favourites
✎ Edit this setting

Firstname Lastname

Specifies the order in which the firstname and the lastname of agents will be displayed.

Default: 0

1.290: 0000 - 0000

**FirstnameLastnameOrder** Framework.xml Frontend::Base ☰

Firstname Lastname

✎ Edit this setting

Edit this setting

Specifies the order in which the firstname and the lastname of agents will be displayed.

1.291: 0000 - 000000

**FirstnameLastnameOrder** ☰

Firstname Lastname

Specifies the order in which the firstname and the lastname of agents will be displayed. ✔ ✘

1.292: 0000 - 0000

**FirstnameLastnameOrder** ☰

🕒 History
↺ Reset setting
🔗 Copy direct link
☆ Add to favourites
✔ Save ✘ Cancel

Lastname Firstname

Specifies the order in which the firstname and the lastname of agents will be displayed.

Default: 0

1.293: 0000 - 0000

**FirstnameLastnameOrder** ☰

🕒 History
↺ Reset setting
🔗 Copy direct link
☆ Add to favourites
✎ Edit this setting

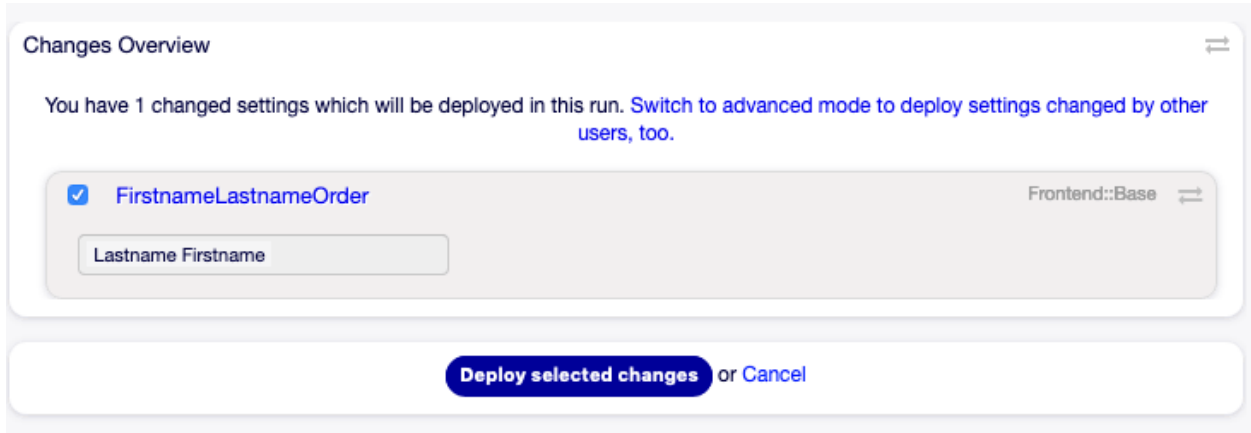
Lastname Firstname

Specifies the order in which the firstname and the lastname of agents will be displayed.

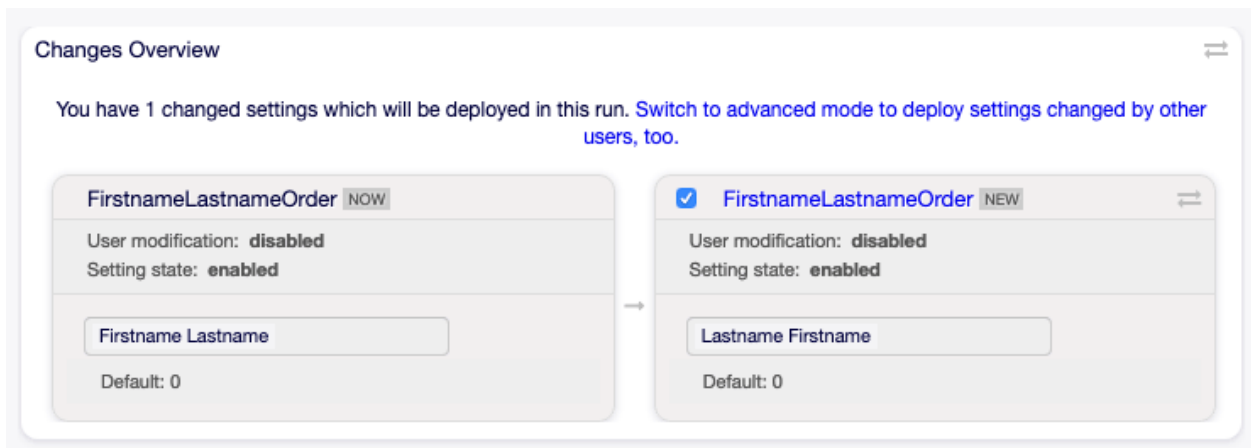
Default: 0

1.294: 0000 - 0000

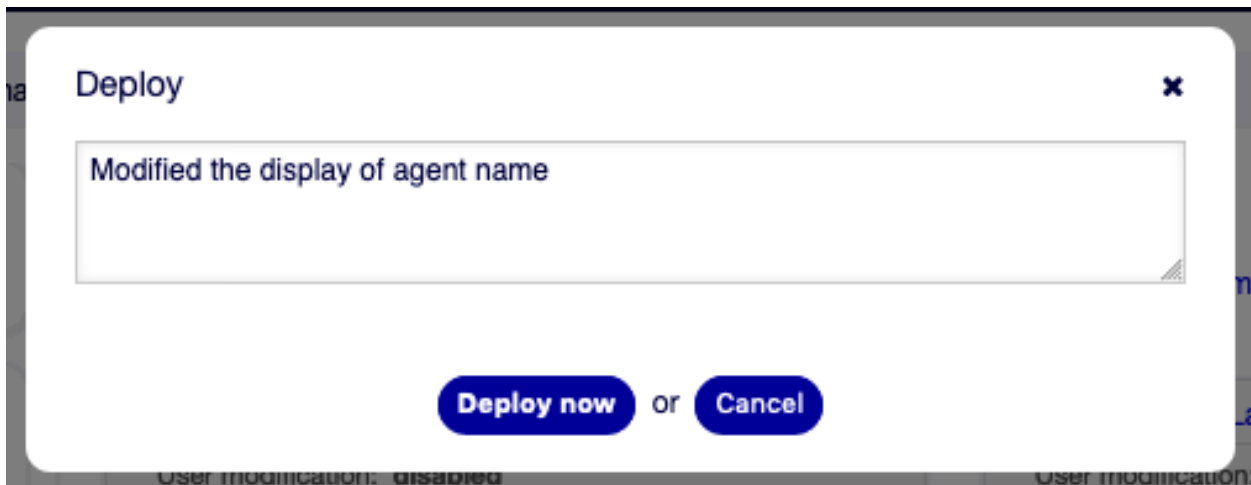




1.295: 00000 - 00000000



1.296: 00000 - 00000000



1.297: 00000 - 00000

13. `lastname` の表示順序を指定する

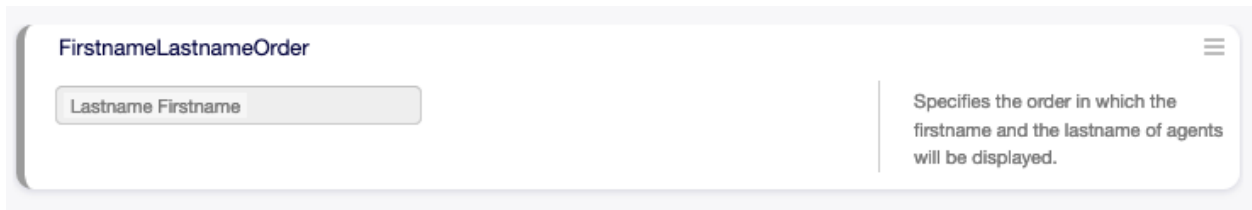


図 1.298: 名前 - 姓

14. 設定をリセットする

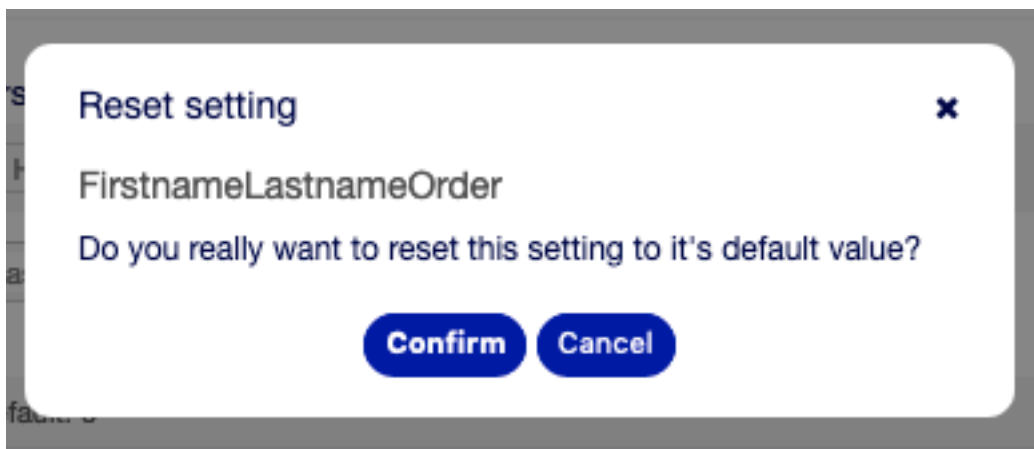


図 1.299: 名前 - 姓

15. 名前

16. 姓

手順

1. `FirstnameLastnameOrder` の値を `Lastname Firstname` に変更する

2. `FirstnameLastnameOrder` の値を `Firstname Lastname` に変更する

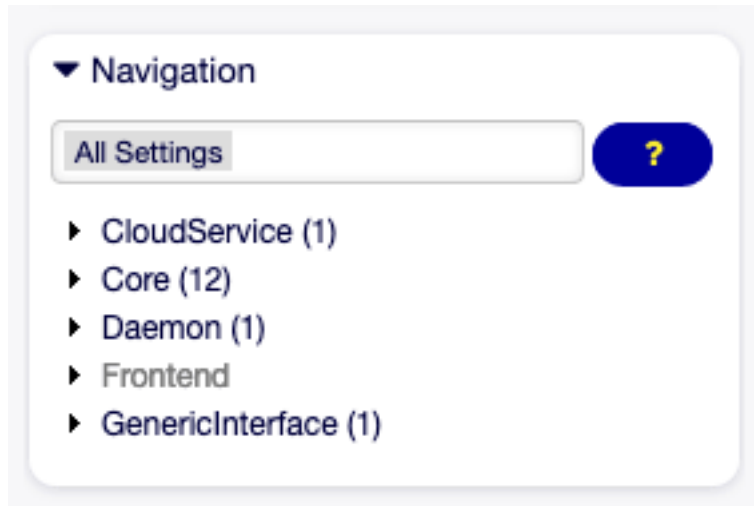
3. `FirstnameLastnameOrder` の値を `Firstname Lastname` に変更する

4. `FirstnameLastnameOrder` の値を `Firstname Lastname` に変更する

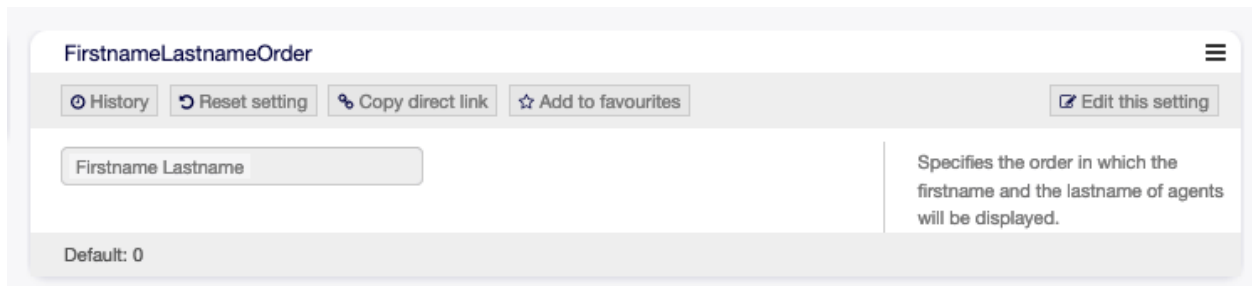
確認

1. `FirstnameLastnameOrder` の値が `Firstname Lastname` に設定されていることを確認する

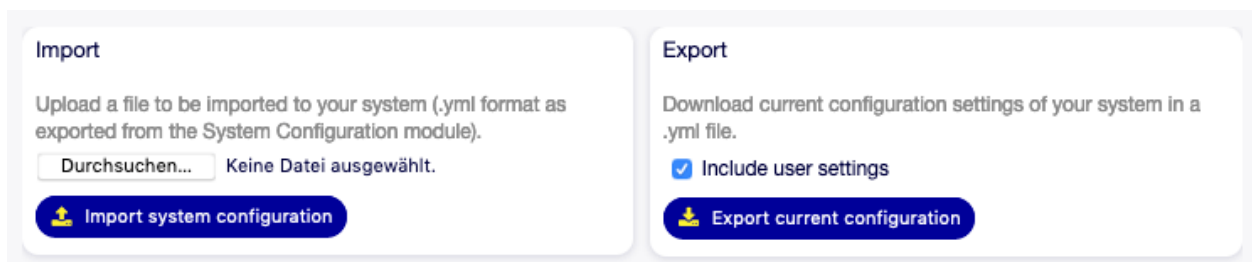
2. `FirstnameLastnameOrder` の値が `Firstname Lastname` に設定されていることを確認する



1.300: Navigation



1.301: Firstname - Lastname



1.302: Import - Export

1. 1. 2. 3.
2. Export\_Current\_System\_Configuration.yml
- 3.

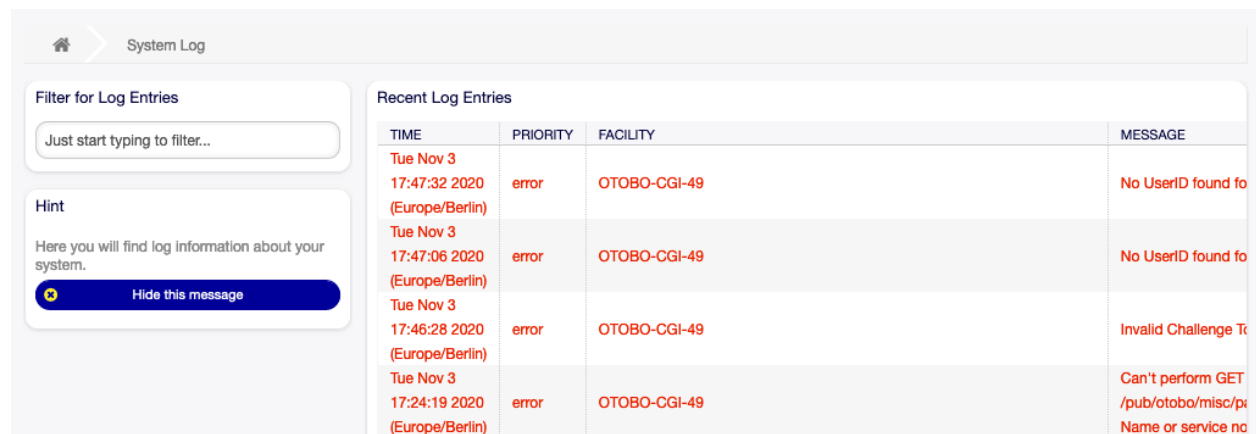
1. 1. 2. 3.
2. .yml
- 3.

### 1.7.10

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.



1.303:

Core → Log



**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**

1.305: 画面イメージ

**▼ 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**

1.306: 画面イメージ



▼ Manage Sessions

All Sessions 1

Unique agents 1


Unique customers 0

**Agent Sessions**

| SESSION                          | TYPE  | USER        | KILL                              |
|----------------------------------|-------|-------------|-----------------------------------|
| CgmMMC8g6j3ujfrVYy4GytTK09zInjOO | Agent | OTOBO Admin | <a href="#">Kill this session</a> |

**Customer Sessions**

| SESSION        | TYPE | USER | KILL |
|----------------|------|------|------|
| No data found. |      |      |      |

 Kill all Sessions, except for your own

1.308: 11.0 - 11.0



## CHAPTER 2

---

### How-Tos

---

How-Tos on configuring your OTOBO.





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



## A

Activity Dialog, 256

□

□□□□, 255

□□, 255

## S

SLA, 256

## T

Transition, 256

Transition Action, 256

□

□□, 256

□

□□, 255

□□□□, 255

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