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OTOBO User Manual

Release 10.0

Rother OSS GmbH

dez 27, 2021

Contents

Introduction

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

1.1 Login to Agent Interface

The agent interface is available at the following location.

Nota: You have to replace `<OTOBO_HOST>` with your domain.

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

You need an agent account to be able to use OTOBO. If you have no account yet, please contact your administrator.

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

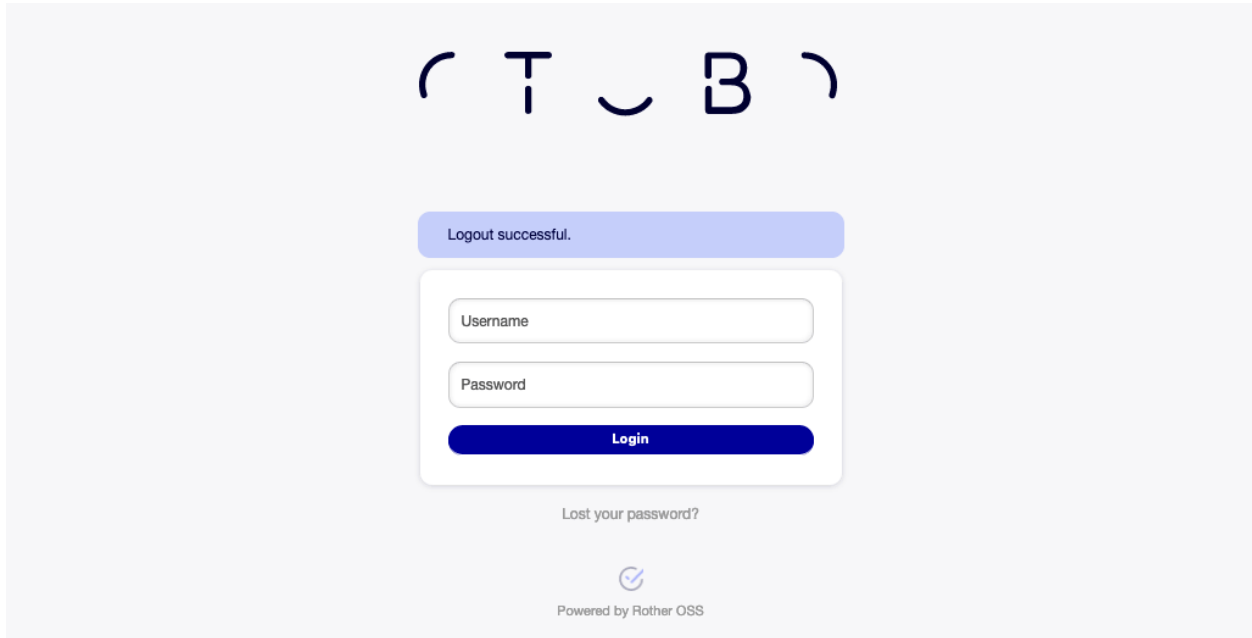After a successful login, the agent dashboard will be displayed.
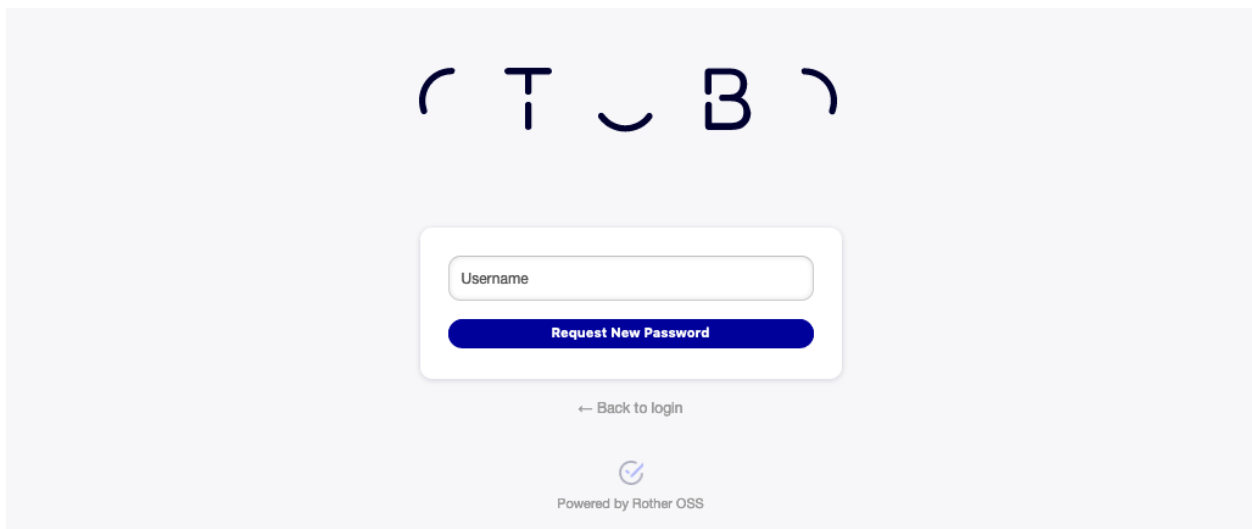
Fig. 1.1: Agent Login Screen

Fig. 1.2: Request New Password Screen

Fig. 1.3: Agent Interface

Dashboard

After login to the agent interface, the agent dashboard will be displayed. This dashboard is a collection of widgets, which display customized important information for each agent.

The dashboard is the main page of the system, where you can get an overview of tickets and other things related to ticket activity. It is designed to be the starting point for an agent's daily work. By default, it provides a quick summary of the tickets that are pending, escalated, new or open, and more information.

One of the most important features about the dashboard is that is completely customizable. That means that you can configure each part as you want, showing or hiding elements. It is even possible to relocate these elements within the same column by clicking on and dragging the header of an element, and dropping them elsewhere. Each element is named *widget*. The system has some widgets ready to use out of the box, but the modular design of the dashboard screen is prepared to integrate custom widgets easily.

The content of this screen is arranged in two main columns, on the left column you normally can see information about tickets classified by their states like: reminder, escalated, new, and open. On each of these widgets you can filter the results to see all of the tickets that you are allowed to access, tickets you have locked, the ones that are located in agent defined queues, among other filters. There are also other kind of widgets in this column and they are all described below.

2.1 Dashboard

The dashboard is the main overview screen for agents. Use this screen to get full overview about the most important things: ticket lists, appointments, statistics, news.

The header consists of three parts.

Avatar image The *Personal Menu* and the *Logout* possibilities.

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

> **Ver também:**
>
> Icons and search boxes can be activated in settings under *Frontend → Agent → Toolbar*.

Fig. 2.1: Agent Dashboard

Fig. 2.2: Dashboard Header

The last icon is the chat availability status.

Ver também:

System configuration `ChatEngine::Active` needs to be activated to use this feature.

The chat availability status icon is a three-way switch, and can be changed by clicking.

- Empty circle: unavailable for chats.

- Empty circle with tick sign: available for internal (agent to agent) chats.

- Filled circle with tick sign: available for internal (agent to agent) and external (customer to agent, public to agent) chats.

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

Main menu The main menu of the agent interface.

The dashboard displays so called *widgets*. A widget is a box, that consists of a header, a filter and a data table. Each widget can be moved with drag and drop, and can have own settings.

Each ticket widget has own filter for displaying:

- My locked tickets: tickets which are locked by the current agent.

- My watched tickets: tickets that the agent has in his/her watched list (requires `Ticket::Watcher` setting to be turned on).

- My responsibilities: tickets that the agent is set as responsible (requires `Ticket::Responsible` setting to be turned on).

- Tickets in My Queues: tickets which are in queues selected in *Personal Preferences*.

- Tickets in My Services: tickets that are assigned to services selected in *Personal Preferences*.

- All tickets: all tickets in this kind of widget.

The numbers indicate the number of tickets in each filter term.

To add new widgets:

1. Click on the *Settings* widget in the right sidebar to expand it.

2. Select the widgets you want to add.

3. Click on the *Save settings* button.

To remove widgets:

1. Click on the *Settings* widget in the right sidebar to expand it.

2. Deselect the widgets you want to remove.

3. Click on the *Save settings* button.

Ver também:

You can also remove a widget, if you hover the mouse over the widget header and click on the × on the top right corner to close the widget.

To move widgets:

1. Click on the widget header and hold down the mouse button.

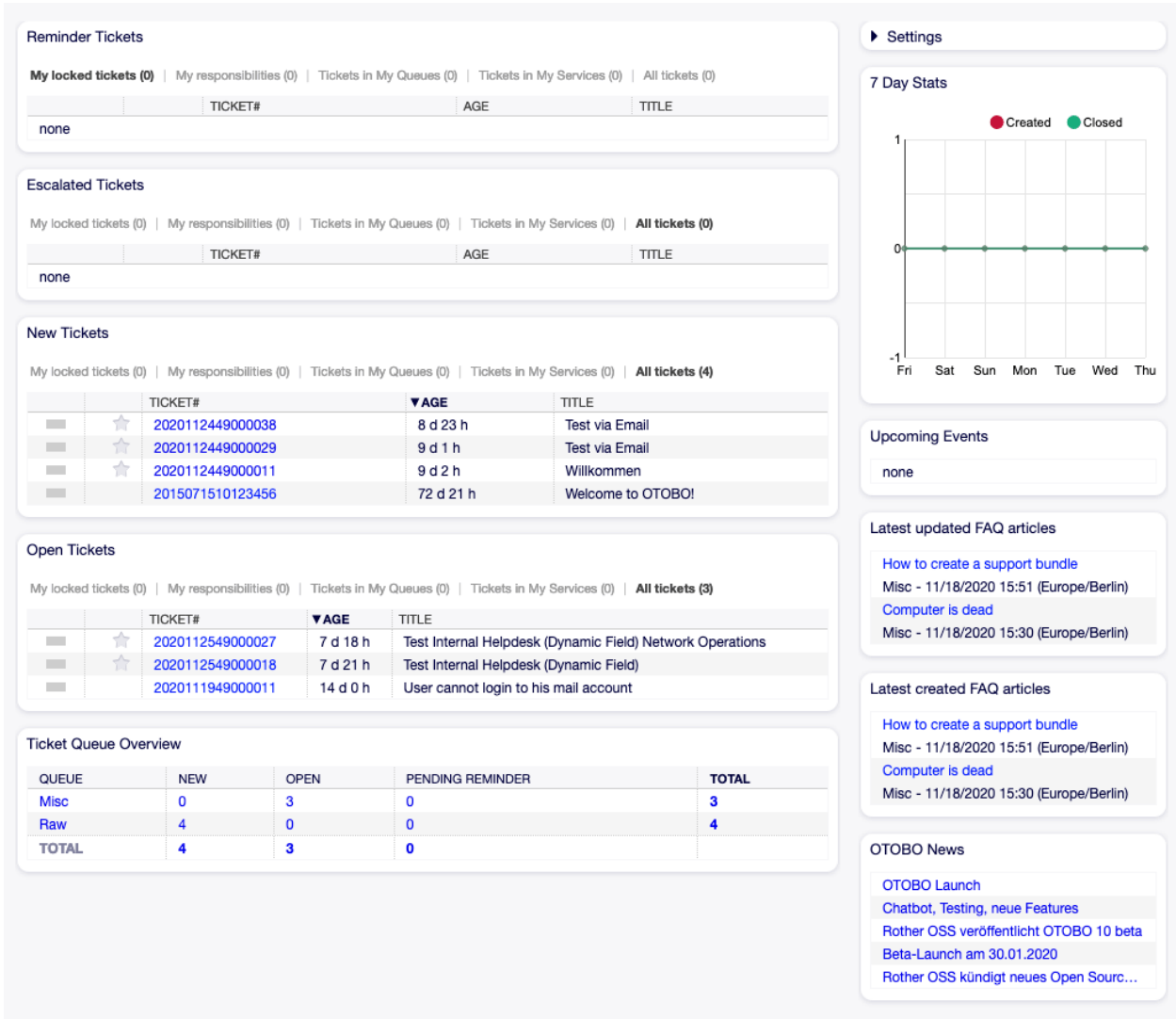2. Drag the widget to the desired position.

Fig. 2.3: Dashboard Widgets

3. Drop the widget by releasing the mouse button.

Widgets can have own settings. To configure a widget:

1. Hover the mouse over the widget header.

2. Click on the gear icon in the top right corner.

3. Change the number and set the visible columns by drag and drop.

4. Click on the *Save Changes* button.
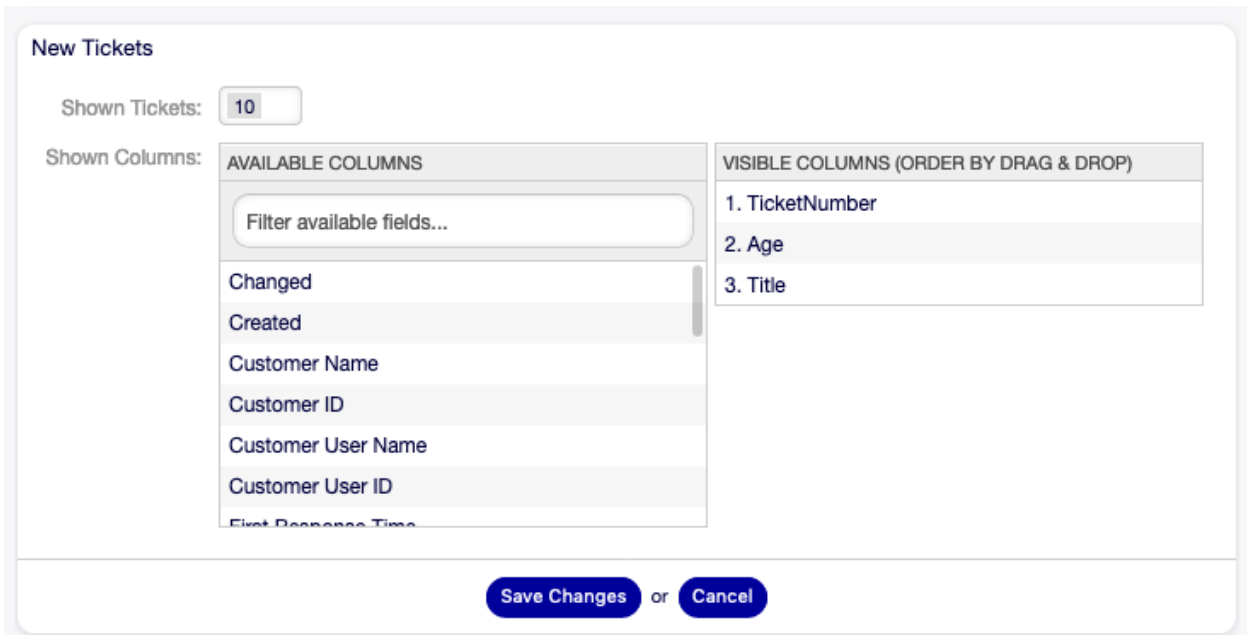
Fig. 2.4: Widget Settings

Nota: The order of visible columns can be set by rearrange the columns in the *Visible columns* field.

2.1.1 Dashboard Content Widgets

Nota: The widgets can be different depending on the installed packages and system configuration settings.

The *Reminder Tickets* widget lists the pending tickets. Pending tickets are set for later work by the agent, and the reminder time is going to expire soon.

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

The *New Tickets* widget lists the recently created tickets. New tickets are not handled by an agent yet.

The *Open Tickets* widget lists the open tickets. Open tickets represent the current work done by the agent.

The *Running Process Tickets* widget lists the process tickets, that are started, but not finished yet.

Fig. 2.5: Reminder Tickets Widget

Fig. 2.6: Escalated Tickets Widget

Fig. 2.7: New Tickets Widget

Fig. 2.8: Open Tickets Widget

Fig. 2.9: Running Process Tickets Widget

The *Ticket Queue Overview* widget gives an overview as a ticket count matrix, where the rows represent queues and the columns represent the ticket states. Each cell displays the number of tickets in a defined state that belongs to a particular queue.

Fig. 2.10: Ticket Queue Overview Widget

The *Events Ticket Calendar* widget displays tickets in a calendar, but this widget does not work out-of-the-box.

To display the tickets in this calendar, the following settings need to be set by an **admin user**:

1. Create the following dynamic fields:

Object	Type	Name	Label
Ticket	Date / Time	`TicketCalendarStartTime`	Calendar Start Time
Ticket	Date / Time	`TicketCalendarEndTime`	Calendar End Time

2. Navigate to *Frontend → Agent → View* and select a view to add the dynamic field to.

   For example add these dynamic fields to *New Phone Ticket* screen and *New Email Ticket* screen to set the dates at ticket creation time, or to *Ticket Free Fields* screen to set the dates for existing ticket in the *Miscellaneous → Free Fields* menu item of the *Ticket Zoom* screen.

   - `Ticket::Frontend::AgentTicketPhone###DynamicField`
     - `TicketCreateStartTime` → *1 – Enabled*
     - `TicketCreateEndTime` → *1 – Enabled*
   - `Ticket::Frontend::AgentTicketEmail###DynamicField`
     - `TicketCreateStartTime` → *1 – Enabled*
     - `TicketCreateEndTime` → *1 – Enabled*
   - `Ticket::Frontend::AgentTicketFreeText###DynamicField`
     - `TicketCreateStartTime` → *1 – Enabled*
     - `TicketCreateEndTime` → *1 – Enabled*

3. Add more queues to `DashboardEventsTicketCalendar###Queues` setting (default is *Raw* queue only).

If the dynamic fields contain values for the tickets, the tickets are displayed in the widget.

Hover the mouse over an entry to see the details of the ticket, or click on it to open the ticket in the *Ticket Zoom* screen.
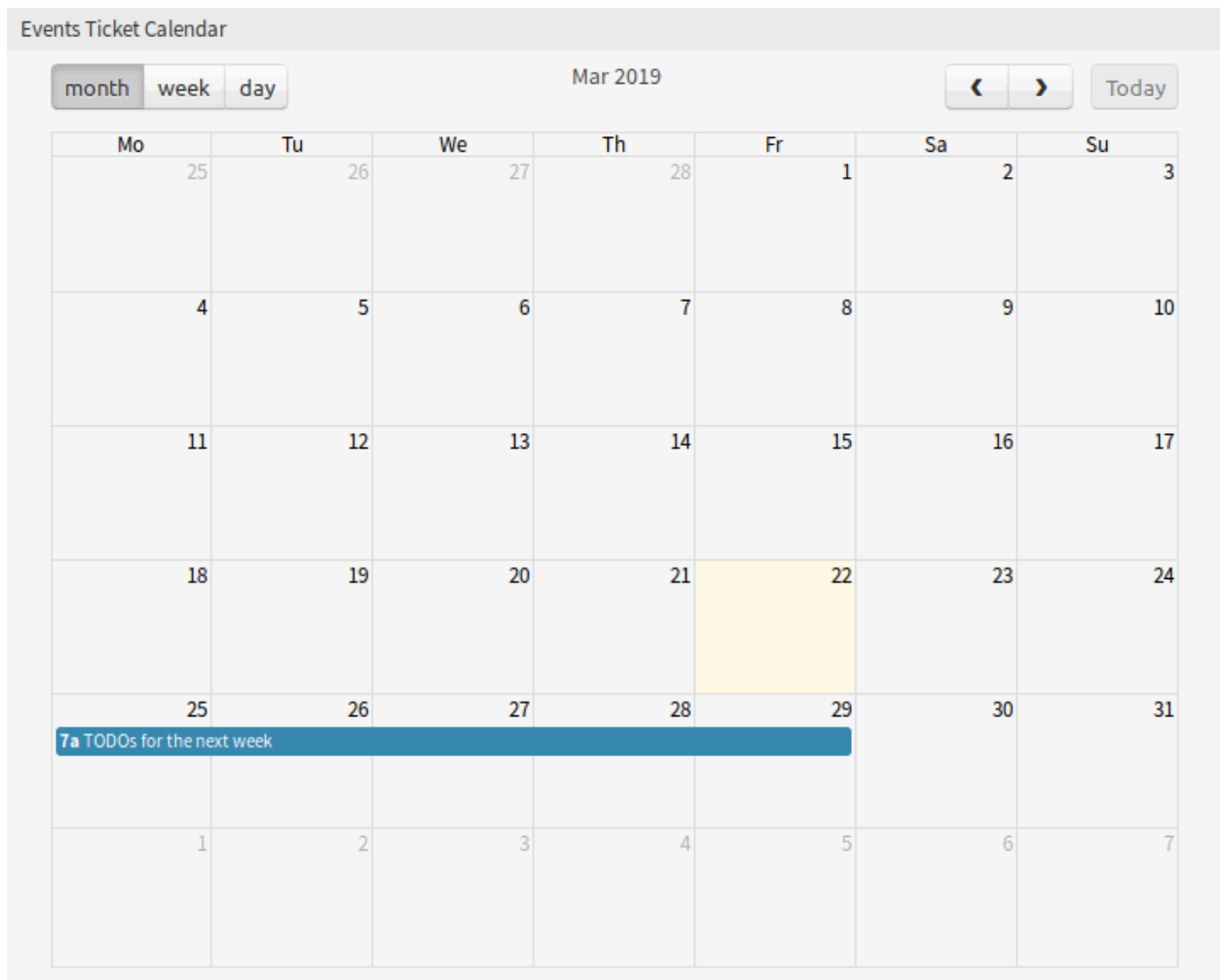
Fig. 2.11: Events Ticket Calendar Widget

2.1.2 Dashboard Sidebar Widgets

The following widgets are located on the right sidebar. There is a *Settings* widget to turn other widgets on or off, and some information widgets also displayed here.

The *Settings* widget lists all available widgets on the screen.

Fig. 2.12: Settings Widget

To turn on or off a widget:

1. Expand the *Settings* widget in the right sidebar by clicking on its header bar.

2. Modify the checked state of a checkbox.

3. Click on the *Save settings* button.

The *7 Day Stats* widget displays the number of created and closed tickets in the last seven days.
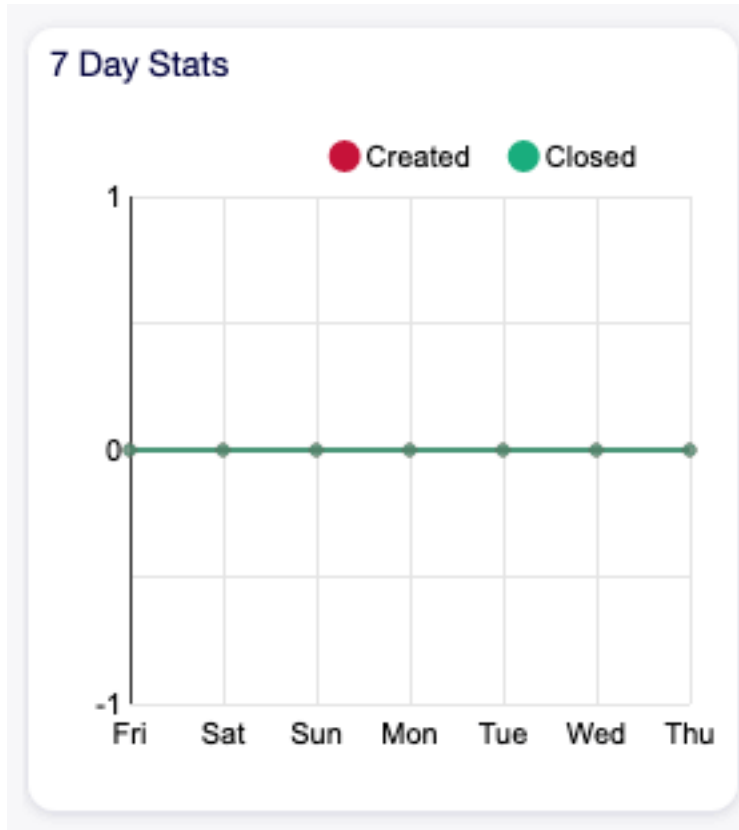
Fig. 2.13: 7 Day Stats Widget

The *Upcoming Events* widget displays entries from the *Calendar*.
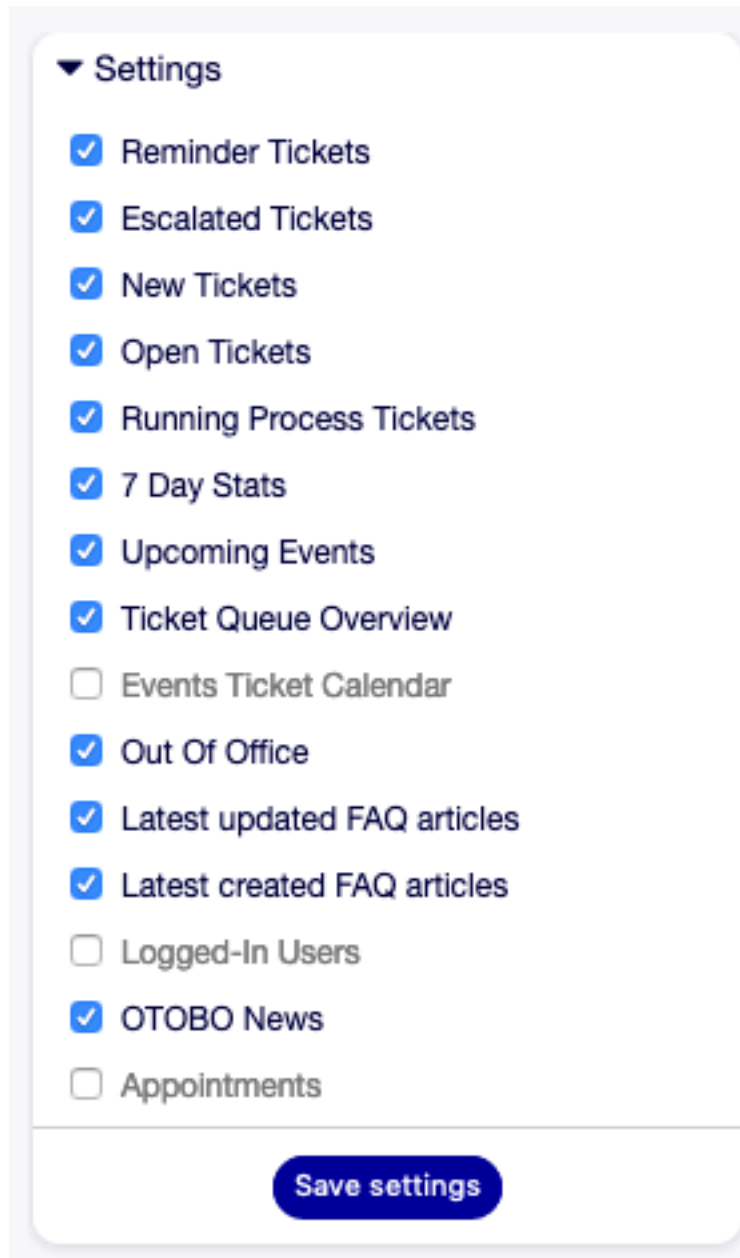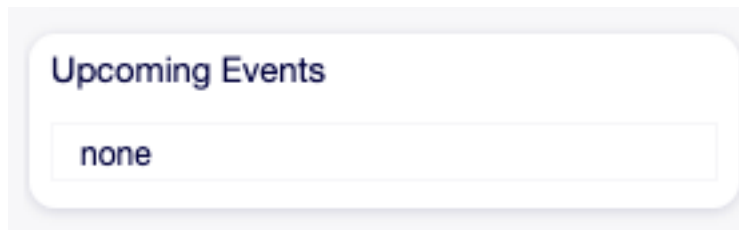

Fig. 2.14: Upcoming Events Widget

The *Out Of Office* widget displays the agents, who are currently out of office. This information can be set in the *User Profile* module of the *Personal Preferences*.

Nota: If currently no agents are out of office, this widget is not displayed.

The *Latest updated FAQ articles* widget displays the FAQ articles, that are updated recently.

The *Latest created FAQ articles* widget displays the FAQ articles, that are created recently.

The *Logged-In Users* widget displays the currently online agents and customer users.

The *OTOBO News* widget displays news from an RSS feed.

Fig. 2.15: Out Of Office Widget

Fig. 2.16: Latest Updated FAQ Articles Widget

Fig. 2.17: Latest Created FAQ Articles Widget

Fig. 2.18: Logged-In Users Widget

Ver também:
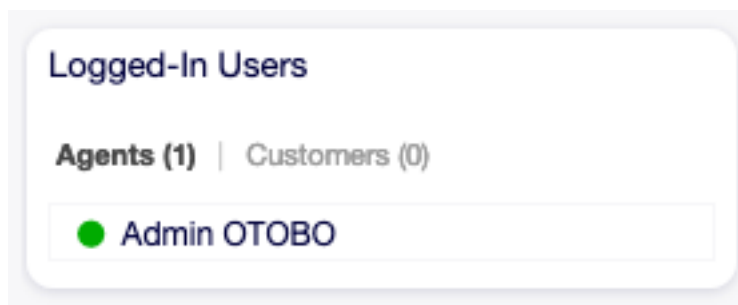
To change the RSS feed source, see `DashboardBackend###0410-RSS` setting.

Fig. 2.19: OTOBO News Widget

The *Appointments* widget displays the appointments for today, tomorrow and for this week.

Click on the *Add Appointment* button to open the *New Appointment* dialog.
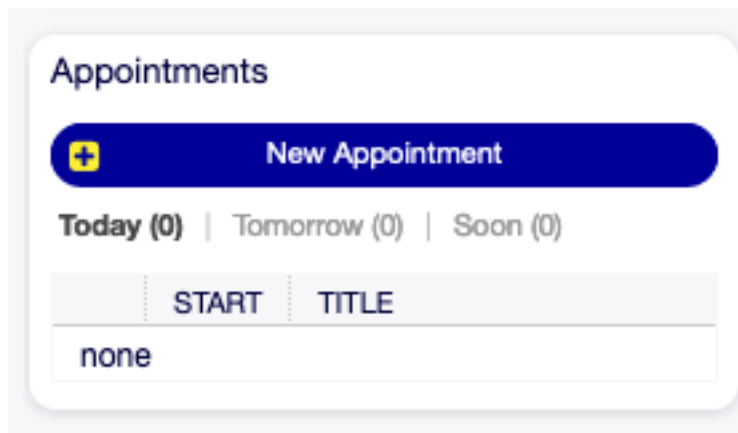

Fig. 2.20: Appointments Widget

Personal Menu

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

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

3.1 Notifications

Use this screen to get an overview of notifications. The notification overview screen is available in the *Notifications* menu item of the *Avatar* menu.

If unread notifications are in this screen, a flag icon with number also indicates the number of unread notifications in the toolbar.

Notification Web View: All Notifications

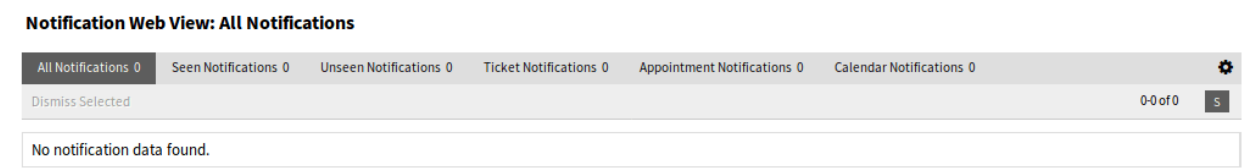| All Notifications 0	Seen Notifications 0	Unseen Notifications 0	Ticket Notifications 0	Appointment Notifications 0	Calendar Notifications 0	⚙
Dismiss Selected					0-0 of 0	S

No notification data found.

Fig. 3.1: Notification Web View Screen

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

To limit the number of displayed notifications per page and adjust visible columns:

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of notifications displayed per page and set the visible columns by drag and drop.

3. Click on the *Submit* button.

Nota: The order of visible columns can be set by rearrange the columns in the *Visible columns* field.

3.2 Personal Preferences

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

This overview screen consists of three modules.

- User Profile
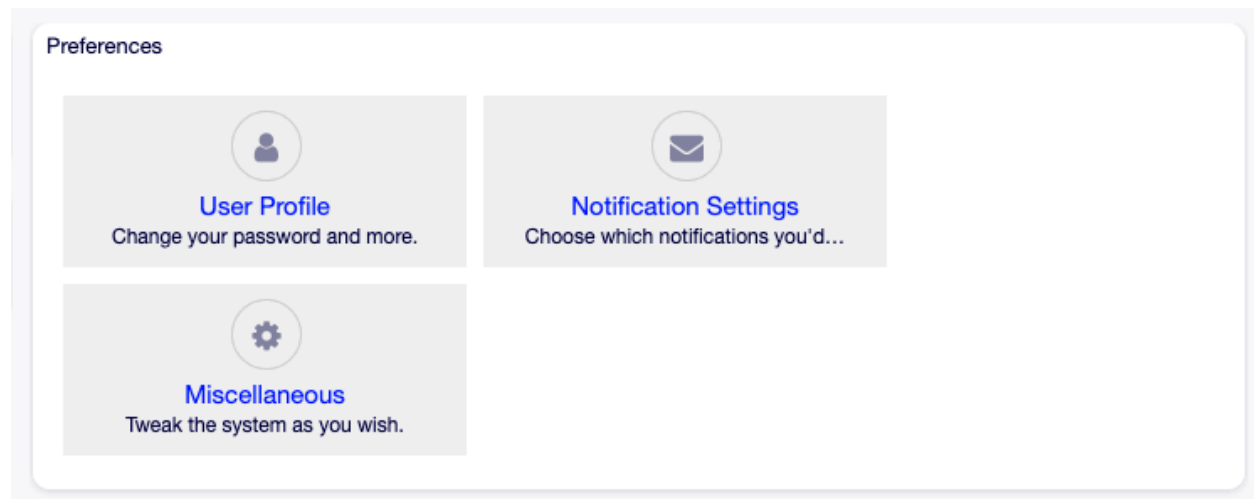- Notification Settings
- Miscellaneous

Fig. 3.2: Preferences Modules

Each module consists of widgets, which have two columns. In the first column is the setting, and in the second column is a description for the setting.

Nota: Do not forget to apply the changes by clicking on the tick icon in the right part of the widget.

3.2.1 User Profile

This is the agent profile, where the account related settings can be changed.

Change password

In this widget the current password can be changed. To change the password, all fields must be filled.

Current password Type your current password for security reasons, if you want to change it.

Fig. 3.3: Change Password Widget

New password Type your new password here.

Verify password Type your new password again to avoid misspelling the new password.

Google Authenticator

Ver também:

System configuration `PreferencesGroups###GoogleAuthenticatorSecretKey` needs to be activated to use this feature.

This is a two factor authentication token described in RFC6238 to improve the account security. Google Authenticator is a mobile application to generate tokens, but any other generator application can be used.

Fig. 3.4: Google Authenticator Widget

Shared Secret This is a string to use for token generation. It must contain only uppercase letters (A-Z) and numbers (2-7). Click on the *Generate* button to generate a secret.

> **Aviso:** 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.

Avatar

Here can be changed the image used as avatar image in *Ticket Zoom* screen and in the main menu.

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

Language

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

Only those languages are listed by default, in which OTOBO is translated more than 95%. To see all available languages, click on the refresh icon next to the drop-down list.
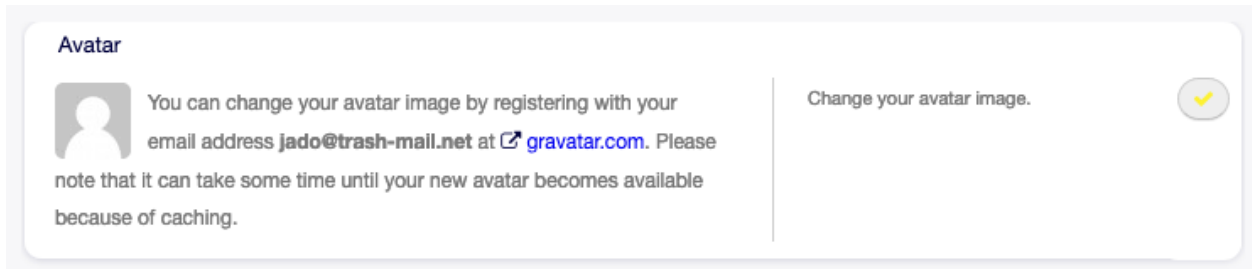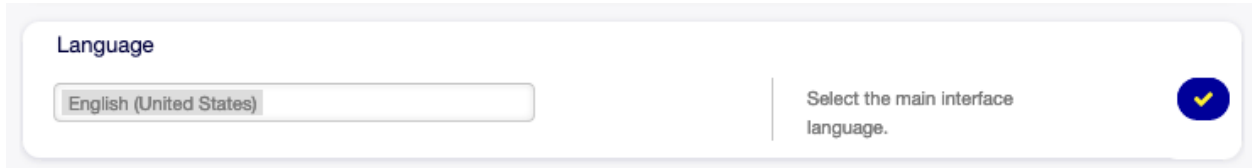
Ver também:

Fig. 3.5: Avatar Widget

Fig. 3.6: Language Widget

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

Time Zone

Each agent has to set the timezone of the current location to get proper date and time calculation in OTOBO.
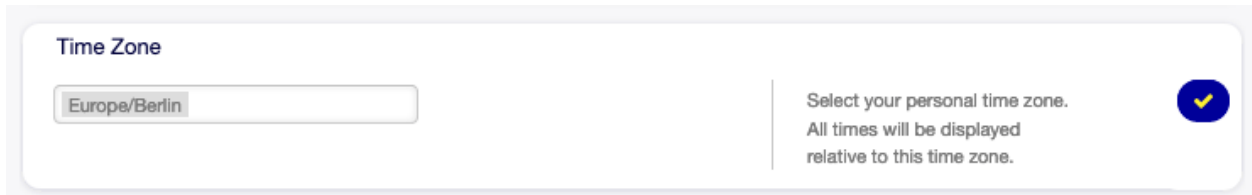

Fig. 3.7: Time Zone Widget

Select the location where you are currently in.

Out Of Office Time

With this widget agents can inform other agents about absence. This is useful for resource planning and workload balancing.

Active The function can be turned on or off.

Start The first day of absence.

End The last day of absence.

3.2.2 Notification Settings

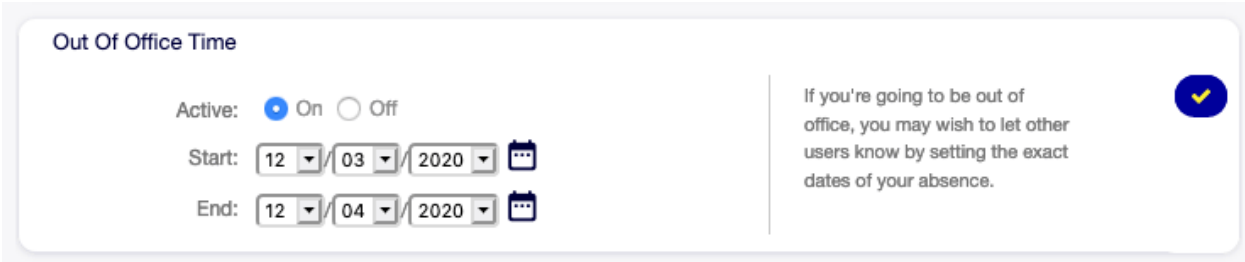These settings are for customizing personal notifications.

Fig. 3.8: Out Of Office Time Widget

My Queues

In this widget some queues can be selected as preferred queues. Tickets in this queues will be displayed under the *Tickets in My Queues* filter of the ticket widgets, and notifications will be sent, if new tickets are available in one of the selected queues.

In *Queue View* only those queues will be displayed under *My Queues* filter, that are selected in this widget.

In case of owner or responsible selection, only agents are listed by default as potentially owner or responsible, who are set the queue as preferred queue in this widget.
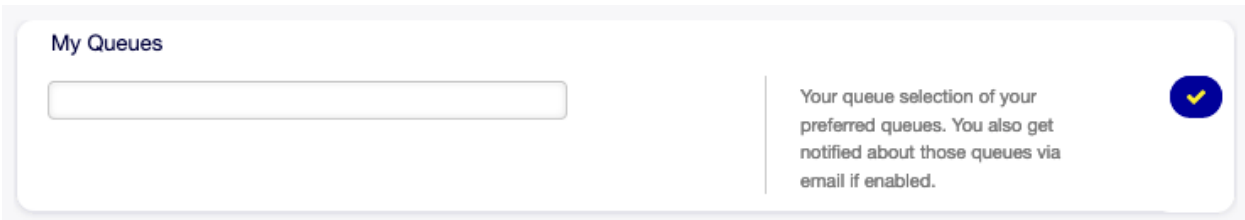
Fig. 3.9: My Queues Widget

Select one or more queues from the drop-down list.

My Services

Ver também:

System configuration `Ticket::Service` needs to be activated to use this feature.

In this widget some services can be selected as preferred services.

In *Service View* only those services will be displayed under *My Services* filter, that are selected in this widget.
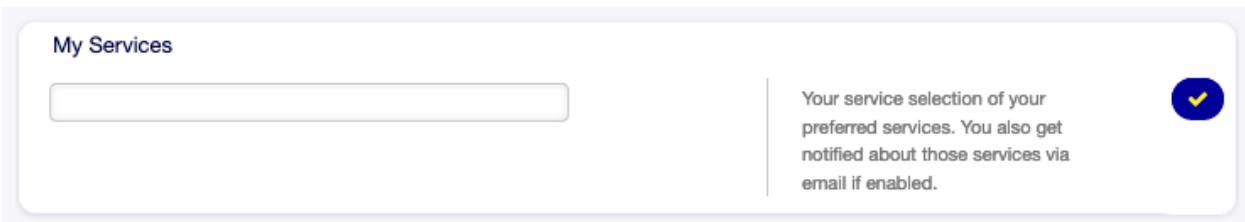

Fig. 3.10: My Services Widget

Select one or more services from the drop-down list.

Ticket Notifications

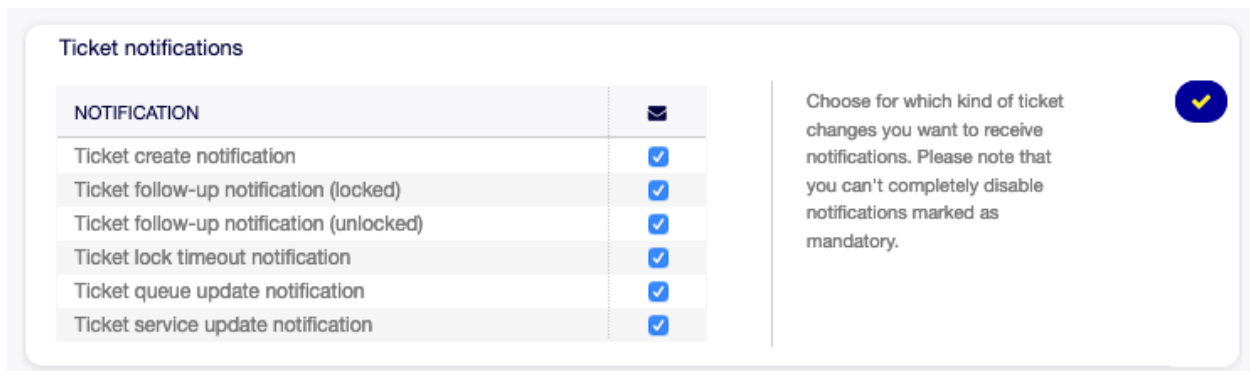In this widget can be selected the methods used for any kind of ticket notifications.

Fig. 3.11: Ticket Notifications Widget

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

Appointment Notifications

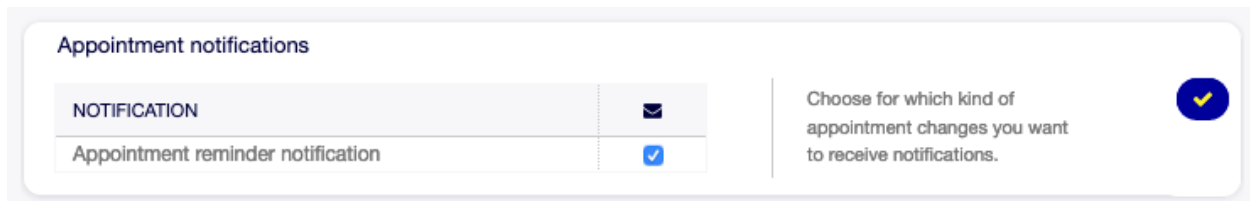In this widget can be selected the methods used for appointment notification.

Fig. 3.12: Appointment Notifications Widget

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

My Chat Channels

Ver também:

System configuration `ChatEngine::Active` needs to be activated to use this feature.

In this widget some chat channels can be selected as preferred external chat channels. You will be notified about external chat requests in these chat channels.

In *Manage Chats* screen only those chat channels will be displayed under *My Chat Channels* filter, that are selected in this widget.

Select one or more chat channels from the drop-down list. An agent needs to select in which chat channels want to be available. Customers will only be able to create a new chat request on a certain channel if at least one agent with owner permissions has selected this channel in their preferences and is set as available for external chats by the chat availability icon in the *Dashboard* header toolbar.

Fig. 3.13: My Chat Channels Widget

3.2.3 Miscellaneous

These settings are for change of visual appearance of OTOBO.

Skin

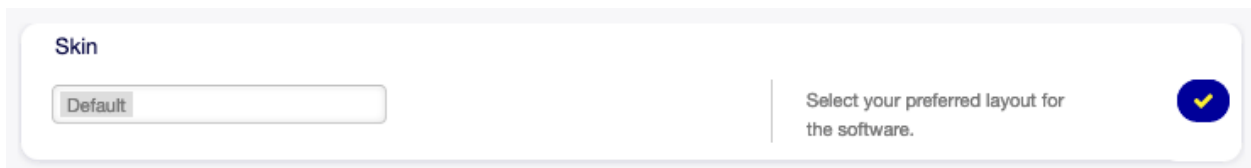In this widget can be selected the skin, that OTOBO should wear.

Fig. 3.14: Skin Widget

Select a skin from the drop-down list.

Overview Refresh Time

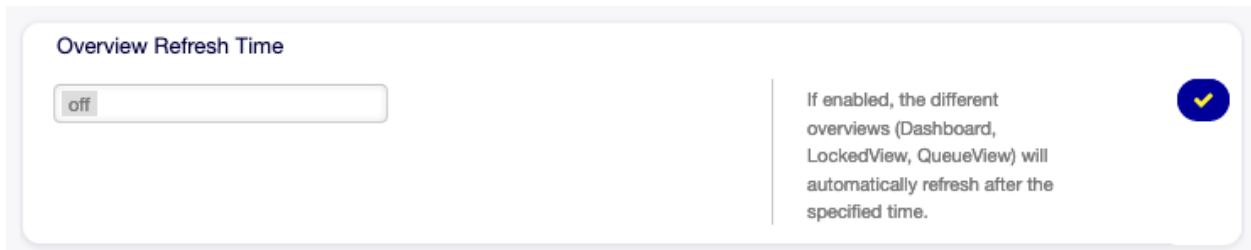It is possible to make overview screens automatically refreshed after a period of time.

Fig. 3.15: Overview Refresh Time Widget

Select a refresh interval from the drop-down list.

> **Aviso:** Refreshing the overview screens too often can cause performance issues on large systems with many agents.

Screen after new ticket

Select, which screen should be shown after a new ticket has been created.
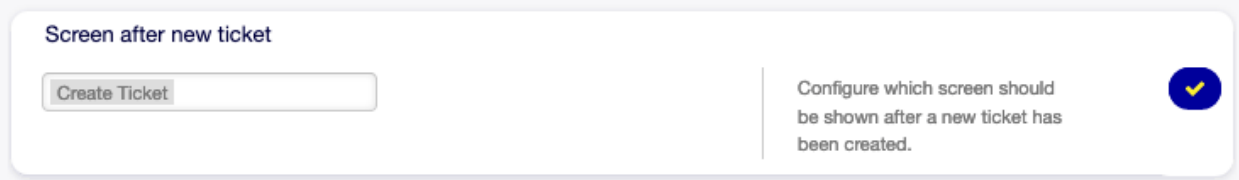
Fig. 3.16: Screen After New Ticket Widget

Select a screen from the drop-down list.

3.2.4 Advanced

In this module can be configured some system configuration options.
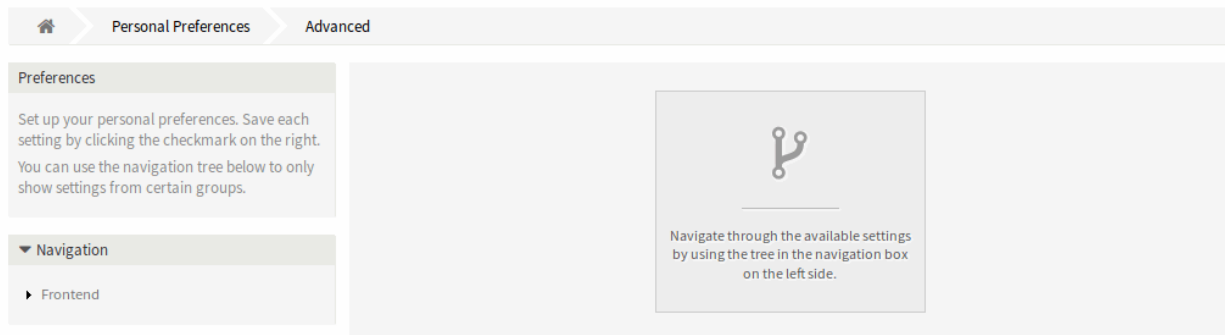
Fig. 3.17: Advanced Preferences Screen

To modify a setting:

1. Use the tree navigation in the left sidebar to find the desired setting.

2. Modify the value.

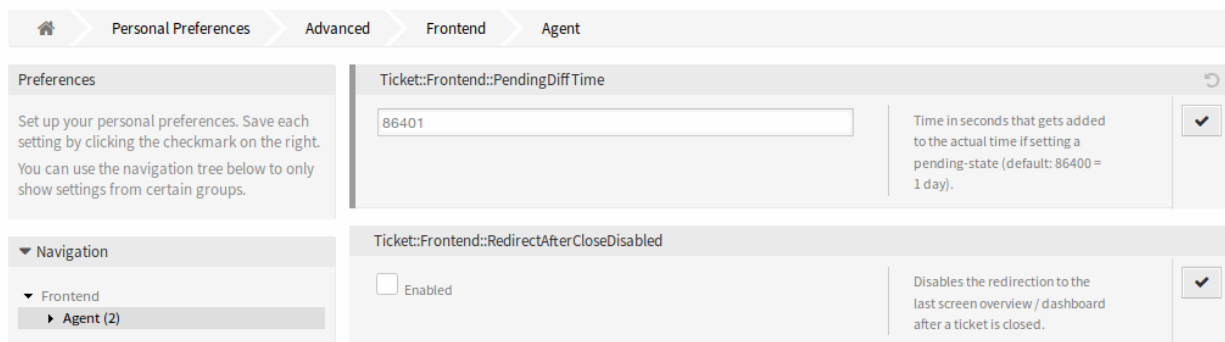3. Click on the tick button in the right side of the setting widget.

Fig. 3.18: Advanced Preferences - Tree navigation Screen

The modified settings have a gray border on the left.

To reset a setting:

1. Click on the reset icon in the top right corner of the setting widget.

3.3 Logout

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

Nota: Clicking on this menu item will logout the agent without confirmation.

Customers

Use this menu to get overview screens for customers and customer users. Both customers and customer users can be managed here.

4.1 Customer Information Center

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

Use this screen to access the customer dashboard. The dashboard is available in the *Customer Information Center* menu item of the *Customers* menu.

4.1.1 Manage Customer Tickets

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

Search   ✖

Customer: [   ]

Customer User: [   ]

Fig. 4.1: Customer or Customer User Search Dialog

Nota: Usage of wildcards (*) is also possible. Enter two asterisks (**) to list all customers or customer

users.

After a customer or a customer user is selected, the *Customer Information Center* dashboard will be opened. The dashboard contains many widgets.

Nota: The order of the widgets can be rearranged by drag and drop, and the widgets can be removed with the close icon on the top right corner of each widget.

Ver também:

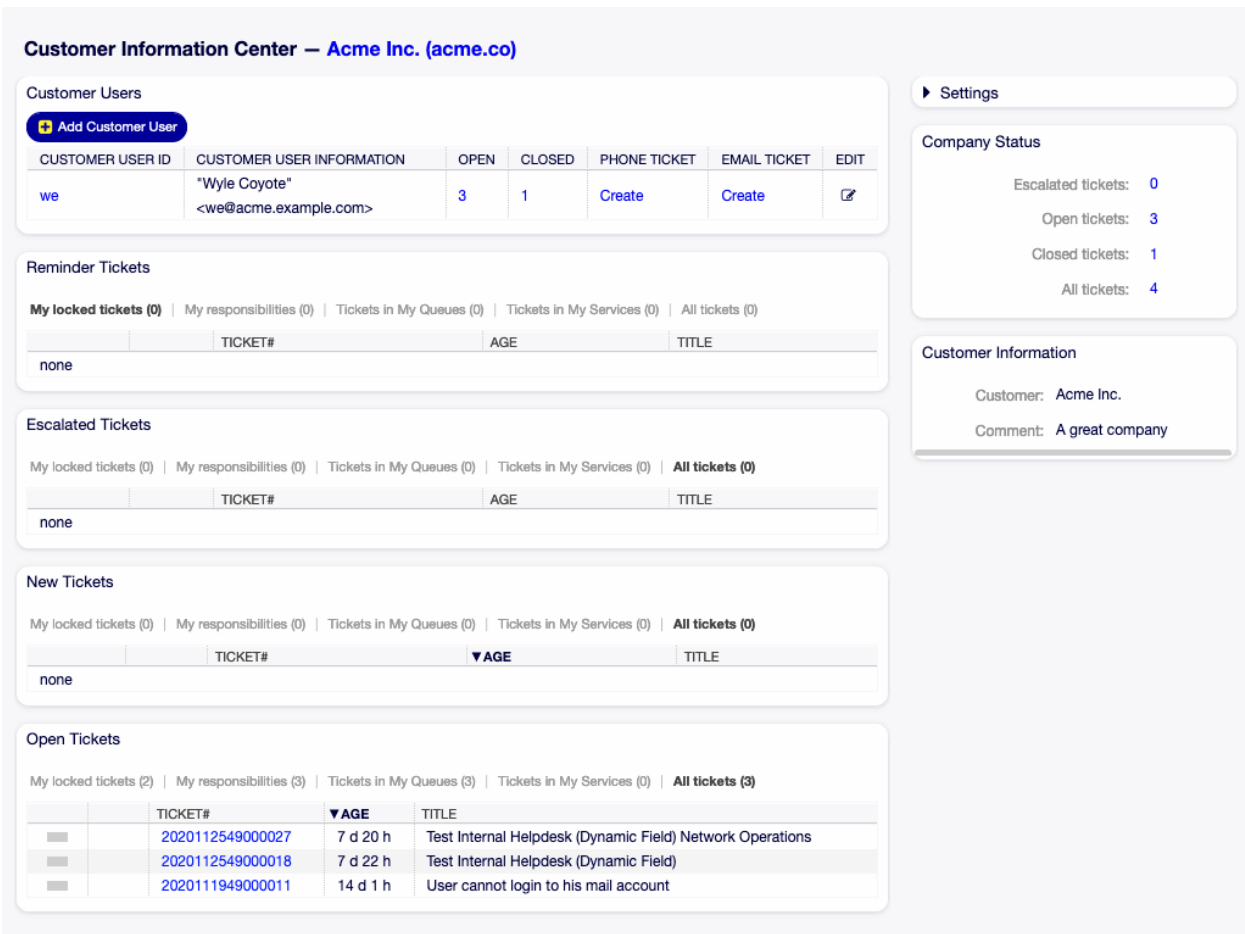See chapter *Dashboard* for more detailed explanation of managing widgets.

Fig. 4.2: Customer Information Center Dashboard

Customer Information Center Content Widgets

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

To add a new customer user:

1. Click on the *Add Customer User* button in the top of the widget.

Fig. 4.3: Customer Users Widget

2. Fill in the required fields.

3. Click on the *Save* button.

To edit a customer user:

1. Click on the pencil icon in the last column of the table.

2. Modify the fields.

3. Click on the *Save* or *Save and finish* button.

To see the details of a customer user:

1. Click on the name of a customer user.

2. See the customer and all relevant tickets in the *Customer User Information Center*.

To create new ticket for a customer user:

1. Click on the *Create* link in the *Phone Ticket* or *Email Ticket* column.

2. Follow the instruction in *New Phone Ticket* or in *New Email Ticket* screen.

To search for tickets of a customer user:

1. Click on the numbers in the *Open* or *Closed* column.

2. Find the needed ticket in the new screen.

The following widgets display tickets related to a customer.

Each ticket widget has an own filter for displaying:

- My locked tickets: tickets which are locked by the current agent.

- Tickets in My Queues: tickets which are in queues selected in *Personal Preferences*.

- All tickets: all tickets in this kind of widget.

The *Reminder Tickets* widget lists the pending tickets. Pending tickets are set for later work by the agent, and the reminder time is going to expire soon.

Fig. 4.4: Reminder Tickets Widget

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

Fig. 4.5: Escalated Tickets Widget

The *New Tickets* widget lists the recently created tickets. New tickets are not handled by an agent yet.

Fig. 4.6: New Tickets Widget

The *Open Tickets* widget lists the open tickets. Open tickets represent the current work done by the agent.

Fig. 4.7: Open Tickets Widget

Customer Information Center Sidebar Widgets

The following widgets are located on the right sidebar. There is a *Settings* widget to turn other widgets on or off, and some information widgets are also displayed here.

The *Settings* widget lists all available widgets on the screen.

To turn on or off a widget:

1. Expand the *Settings* widget in the right sidebar by clicking on its header bar.
2. Modify the checked state of a checkbox.
3. Click on the *Save settings* button.

The *Company Status* widget displays the number of tickets of the current customer categorized by state.

The *Customer Information* widget displays information about the current customer.

Ver também:

Customer information can be changed in *Customer Administration*.
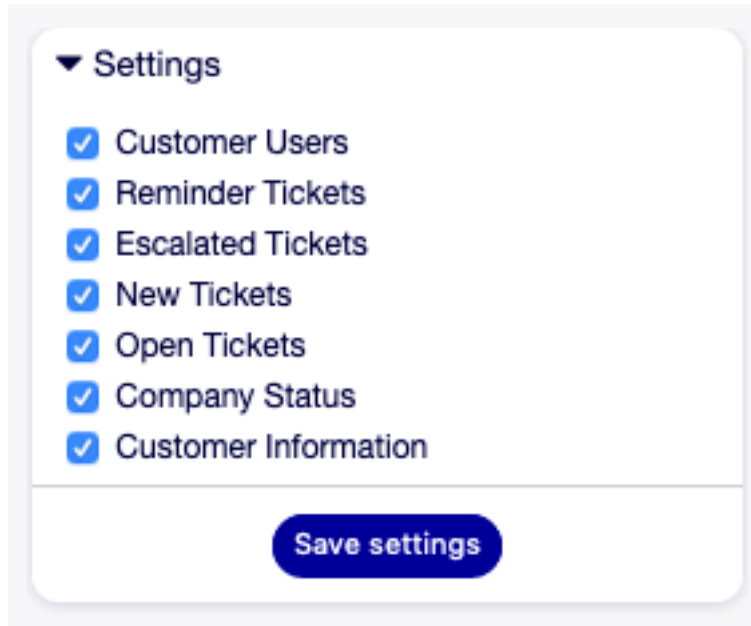
Fig. 4.8: Settings Widget

Fig. 4.9: Company Status Widget
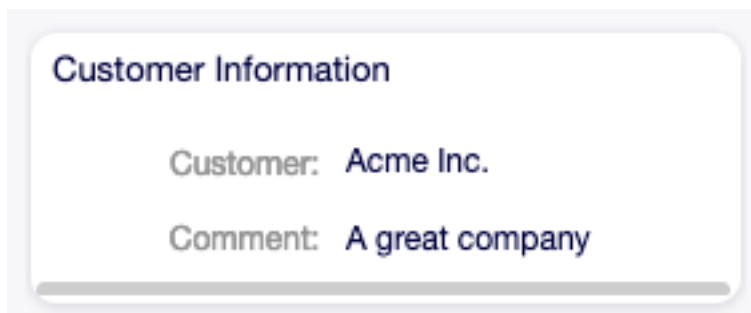
Fig. 4.10: Customer Information Widget

4.2 Customer User Information Center

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

Use this screen to access the customer user dashboard. The dashboard is available in the *Customer User Information Center* menu item of the *Customers* menu.

4.2.1 Manage Customer User Tickets

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

Fig. 4.11: Customer User Search Dialog

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

After a customer user is selected, the *Customer User Information Center* dashboard will be opened. The dashboard contains many widgets.

Nota: The order of the widgets can be rearranged by drag and drop, and the widgets can be removed with the close icon on the top right corner of each widget.

Ver também:

See chapter *Dashboard* for more detailed explanation of managing widgets.

Customer User Information Center Content Widgets

The *Customer IDs* widget is used to list all customers to whom the customer user belongs to. It is possible to edit the customer and see the details directly from the widget.

To edit a customer:

1. Click on the pencil icon in the last column of the table.

2. Modify the fields.

3. Click on the *Save* or *Save and finish* button.

To see the details of a customer:

1. Click on the name of a customer.

2. See the customer users and all relevant tickets in the *Customer Information Center*.

To search for tickets of a customer:

Fig. 4.12: Customer User Information Center Dashboard

Fig. 4.13: Customer IDs Widget

1. Click on the numbers in the *Open* or *Closed* column.

2. Find the needed ticket in the new screen.

The following widgets display tickets related to a customer user.

Each ticket widget has an own filter for displaying:

- Assigned to customer user: tickets which are assigned to the customer user.

- Accessible for customer user: tickets which are accessible for customer user.

- My locked tickets: tickets which are locked by the current agent.

- Tickets in My Queues: tickets which are in queues selected in *Personal Preferences*.

- All tickets: all tickets in this kind of widget.

The *Reminder Tickets* widget lists the pending tickets. Pending tickets are set for later work by the agent, and the reminder time is going to expire soon.
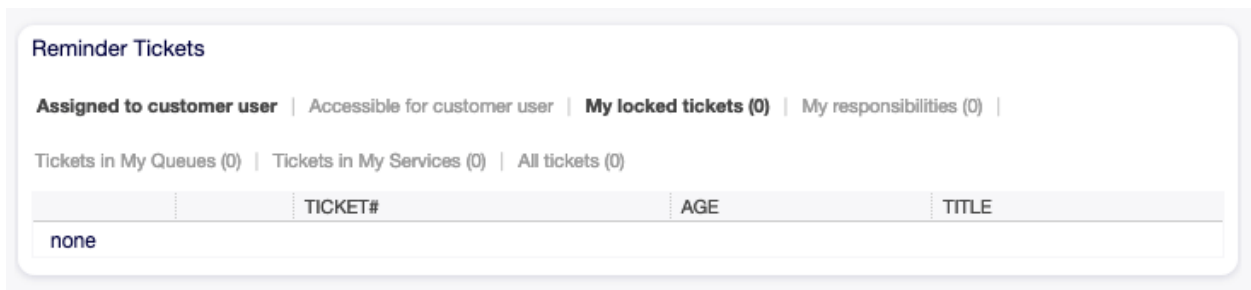
Fig. 4.14: Reminder Tickets Widget

The *Escalated Tickets* widget lists the escalated tickets. Escalated tickets are after the time set in service level agreement, and therefore needs to be worked on them immediately.
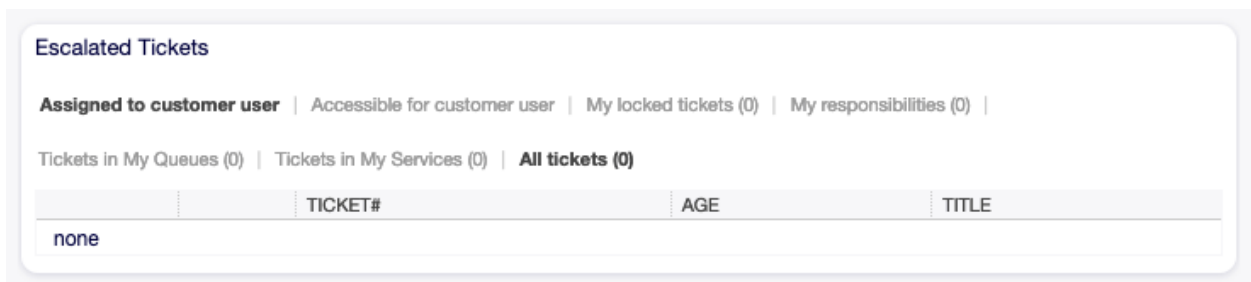
Fig. 4.15: Escalated Tickets Widget

The *New Tickets* widget lists the recently created tickets. New tickets are not handled by an agent yet.

The *Open Tickets* widget lists the open tickets. Open tickets represent the current work done by the agent.

Customer User Information Center Sidebar Widgets

The following widgets are located on the right sidebar. There is a *Settings* widget to turn other widgets on or off, and some information widgets also displayed here.

The *Settings* widget lists all available widgets on the screen.

To turn on or off a widget:

Fig. 4.16: New Tickets Widget

Fig. 4.17: Open Tickets Widget

Fig. 4.18: Settings Widget

1. Expand the *Settings* widget in the right sidebar by clicking on its header bar.
2. Modify the checked state of a checkbox.
3. Click on the *Save settings* button.

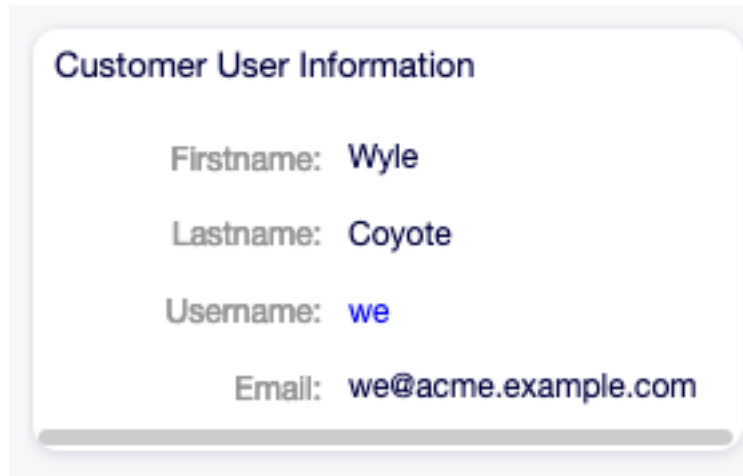The *Customer User Information* widget displays information about the current customer user.

Fig. 4.19: Customer User Information Widget

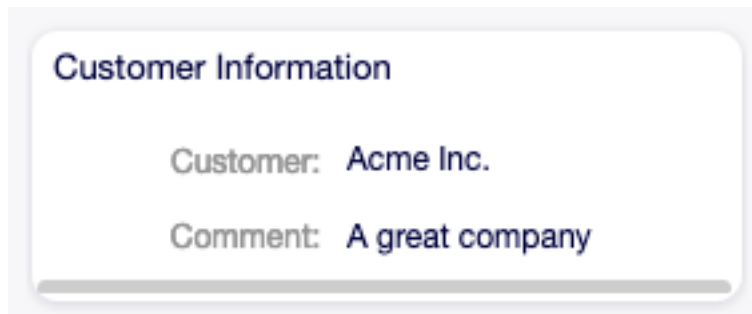The *Customer Information* widget displays information about the current customer.

Fig. 4.20: Customer Information Widget

Ver também:

Customer user information can be changed in *Customer User Administration*.

4.3 Customer User Administration

A record of who your company deals with requires more information about that individual: physical location for shipping and billing purposes, as well as contact information for email and phone contact.

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

Use this screen to add a customer user to the system. A fresh OTOBO installation contains no customer users by default. The customer user management screen is available in the *Customer User Administration* menu item of the *Customers* menu.
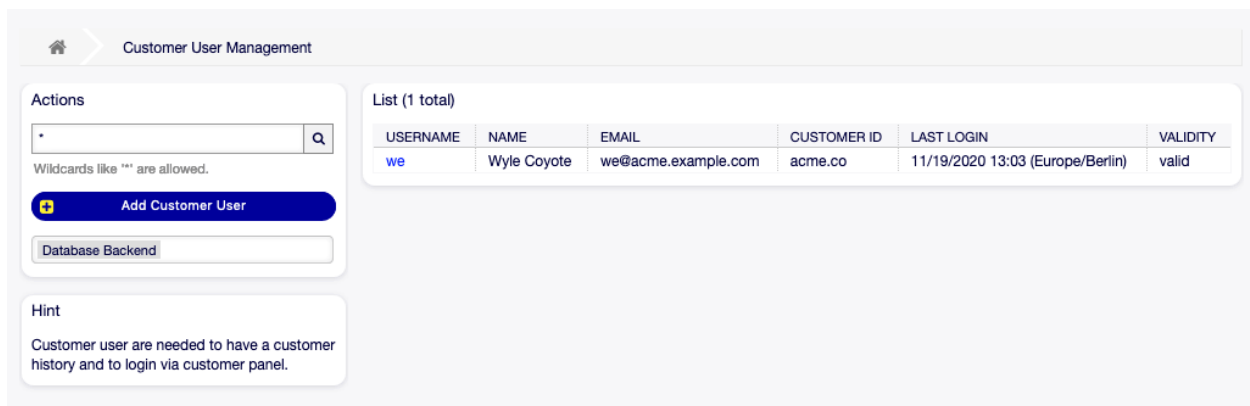
Fig. 4.21: Customer User Management Screen

4.3.1 Manage Customer Users

> **Aviso:** A customer user can only be added to the system when at least one customer exists. Create a customer in *Customer Administration* first.

Nota: Adding or editing a customer user is possible only by using database back end. Using external directory services like LDAP will disable the customer user management functionality.

To add a customer user:

1. Click on the *Add Customer User* button in the left sidebar.
2. Fill in the required fields.
3. Click on the *Save* button.

> **Aviso:** Customer users can not be deleted from the system. They can only be deactivated by setting the *Validity* option to *invalid* or *invalid-temporarily*.

To edit a customer user:

1. Click on a customer user in the list of customer users.
2. Modify the fields.
3. Click on the *Save* or *Save and finish* button.

To find a customer user:

1. Enter a search term to the search box in the left sidebar.
2. Click on the magnifying glass icon in the right part of the field or hit an `Enter`.

Nota: If several customer users are added to the system, use the search box to find a particular customer user. Only the first 1000 customer users are listed by default.

Add Customer User

Title or salutation:	
★ Firstname:	
★ Lastname:	
★ Username:	
Password:	
★ Email:	
★ CustomerID:	
Phone:	
Fax:	
Mobile:	
Street:	
Zip:	
City:	
Country:	
Comment:	
★ Valid:	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: English (United States)

Select the main interface language.Language

Time Zone: UTC

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

Ticket overview: off

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

Number of displayed tickets: 25

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

PGP Key: Durchsuchen... Keine Datei ausgewählt.

Upload your PGP key.PGP Key

Save or Cancel

Fig. 4.22: Add Customer User Screen **Capítulo 4. Customers**

Fig. 4.23: Edit Customer User Screen

The customer user permissions can be controlled by adding a customer or a customer user to groups. This can result a complex matrix of permissions. The effective permissions for a customer user can be checked in the bottom of the *Edit Customer User* screen.

Fig. 4.24: Effective Permissions for Customer User Widget

Ver também:

Customer group support needs to be enabled to use this feature. Please contact your administrator.

Nota: Only administrators can add customer users to groups.

4.3.2 Customer User Settings

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

Nota: These are the default fields available for the internal database table.

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

Firstname * The first name of the customer user.

Lastname * The last name of the customer user.

Username * The username of the customer user to login to the system.

Password The password of the customer user. This will be auto-generated if left empty.

Email * The email address of the customer user.

Customer * The customer company the customer user belongs to. Select a customer from the list. Customers can be added in *Customer Administration*.

Phone The phone number of the customer user.

Fax The fax number of the customer user.

Mobile The cellphone number of the customer user.

Street The street name of the customer.

Zip The zip code of the customer.

City The headquarter city of the customer.

Country The country of the customer user.

Comment Add additional information to this resource. It is recommended to always fill this field as a description of the resource with a full sentence for better clarity, because the comment will be also displayed in the overview table.

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

4.4 Customer Administration

Use this screen to add customer companies to the system. A fresh OTOBO installation contains no customers by default. The customer management screen is available in the *Customer Administration* menu item of the *Customers* menu.
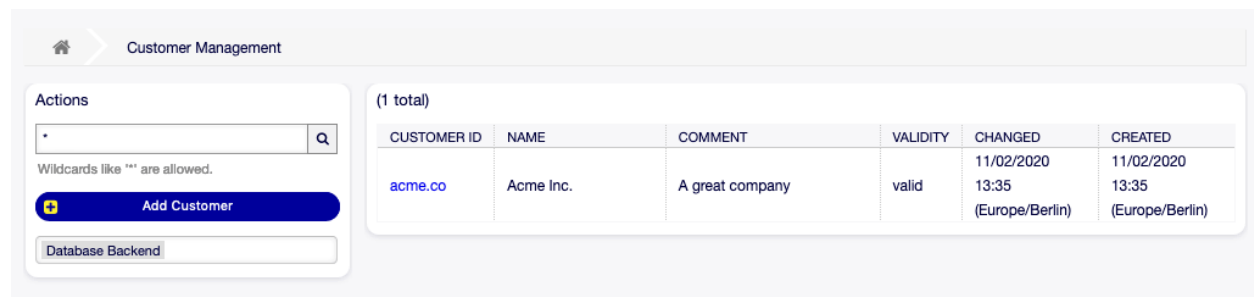
Fig. 4.25: Customer Management Screen

4.4.1 Manage Customers

Nota: Adding or editing a customer is possible only by using database back end. Using external directory services like LDAP will disable the customer management functionality.

To add a customer:

1. Click on the *Add Customer* button in the left sidebar.
2. Fill in the required fields.
3. Click on the *Save* button.

Aviso: Customers can not be deleted from the system. They can only be deactivated by setting the *Validity* option to *invalid* or *invalid-temporarily*.

To edit a customer:

1. Click on a customer in the list of customers.

Fig. 4.26: Add Customer Screen

2. Modify the fields.

3. Click on the *Save* or *Save and finish* button.

To find a customer:

1. Enter a search term to the search box in the left sidebar.

2. Click on the magnifying glass icon in the right part of the field or hit an `Enter`.

Nota: If several customers are added to the system, use the search box to find a particular customer. Only the first 1000 customers are listed by default.

4.4.2 Customer Settings

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

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

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

Street The street name of the customer.

Zip The zip code of the customer.

City The headquarter city of the customer.

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

URL The web page or other URL of the customer.

Fig. 4.27: Edit Customer Screen

Comment Add additional information to this resource. It is recommended to always fill this field as a description of the resource with a full sentence for better clarity, because the comment will be also displayed in the overview table.

Validity * 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.

Calendar

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

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

5.1 Calendar Overview

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

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

Calendar Overview

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

Fig. 5.1: No Calendars Found

This overview works the same like usual calendars. Different time periods and timelines can be selected to view appointments, and it is possible to jump between different periods.

Check or uncheck the checkboxes in the *Calendars* widget to show or hide appointments in a specific calendar.
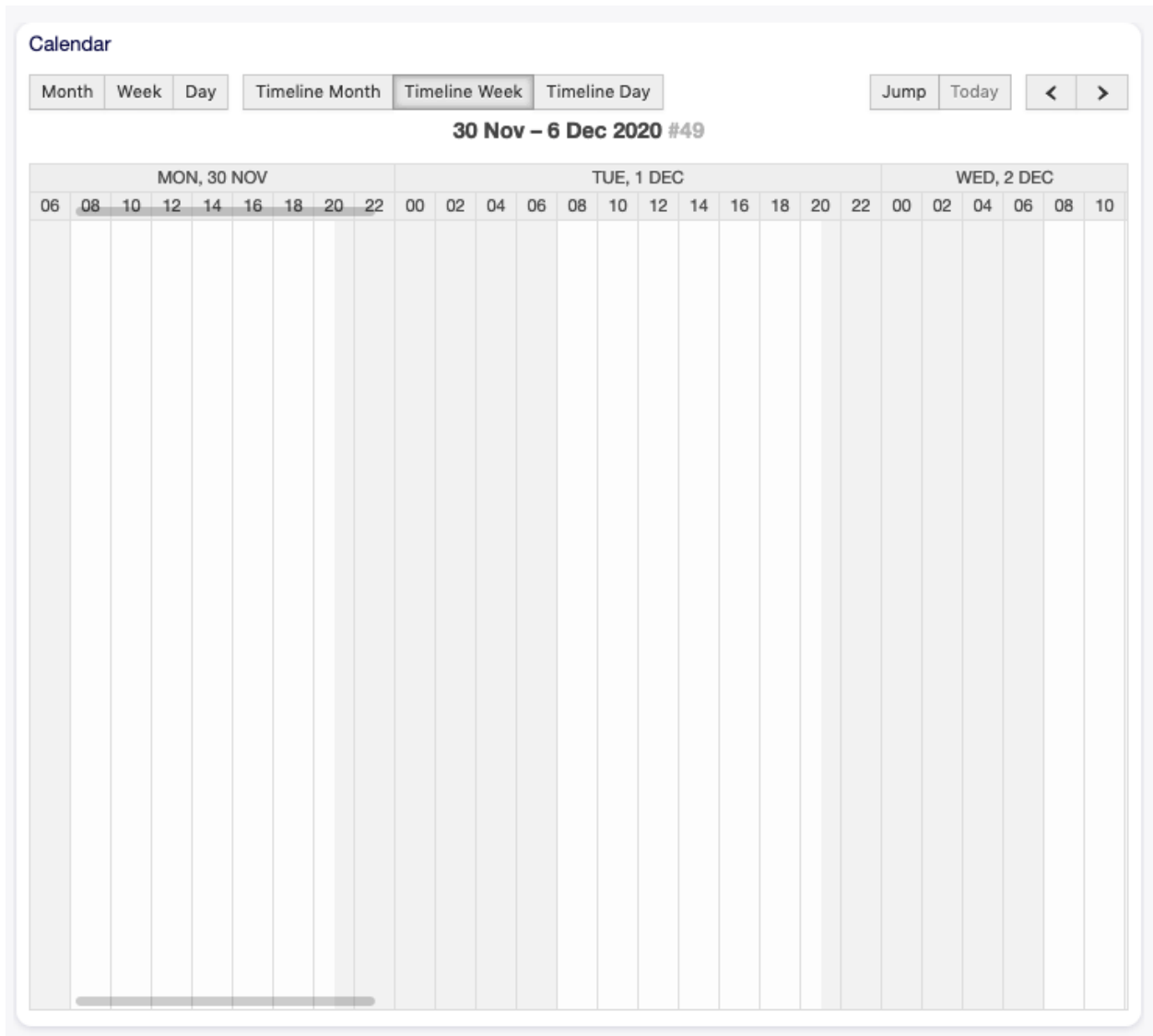
Fig. 5.2: Calendar Overview Screen
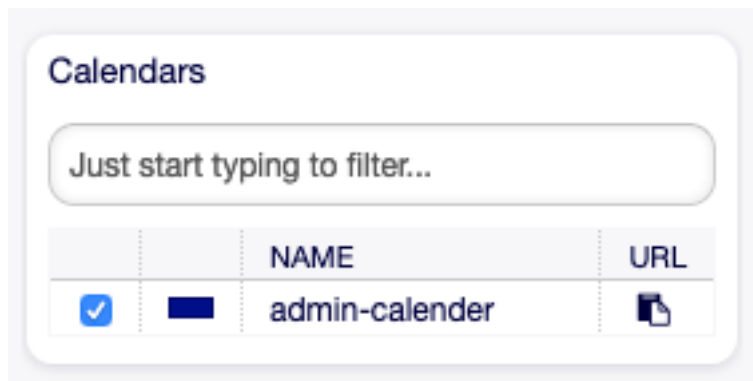
Fig. 5.3: Calendars Widget

To view appointments in external calendar applications:

1. Click on the *Copy public calendar URL* icon in the last column of *Calendars* widget to copy the URL to clipboard.

2. Open your external calendar application.

3. Insert the URL into your external calendar application.

Nota: If several calendars are added to the system, use the filter box to find a particular calendar by just typing the name to filter.

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

To add a new appointment:

1. Click on the *Add Appointment* button in the left sidebar.

2. Fill in the required fields.

3. Click on the *Save* button.

Ver também:

The *Appointment* dialog is explained in *New Appointment* chapter.

To edit an appointment:

1. Click on an appointment in the calendar overview.

2. Modify the fields.

3. Click on the *Save* button.

To copy an appointment:

1. Click on an appointment in the calendar overview.

2. Click on the *Copy* button.

To delete an appointment:

1. Click on an appointment in the calendar overview.

2. Click on the *Delete* button.

3. Click on the *OK* button in the confirmation dialog.

5.2 Agenda Overview

Within the agenda overview, an agent is able to display the appointments of all available (accessible) calendars in a table-like overview. This overview is designed to have a detailed list of upcoming appointments in a structured table. Like in *Calendar Overview* appointments can be created, edited or deleted.

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

This overview supports a monthly, weekly and daily point of view on available appointments.

Fig. 5.4: Appointment Dialog

Fig. 5.5: Edit Appointment Dialog

Fig. 5.6: No Calendars Found
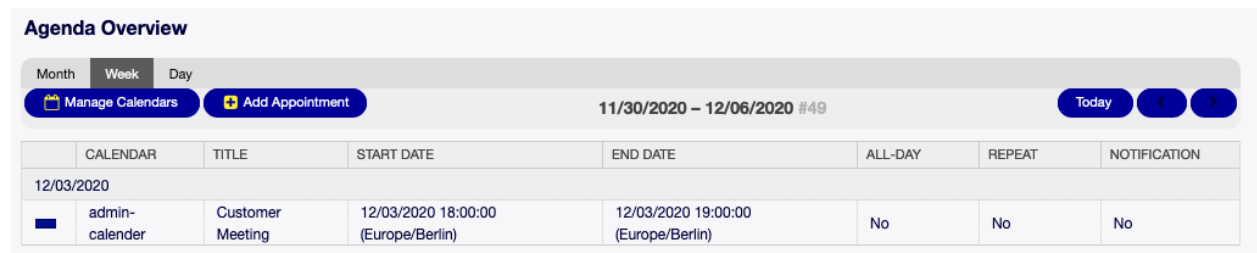
Fig. 5.7: Agenda Overview Screen

5.3 Resource Overview

Nota: Rother OSS TODO: This feature will be included in one of the next OTOBO releases. If you need it beforehand, please contact sales@otobo.de, we will find a solution.
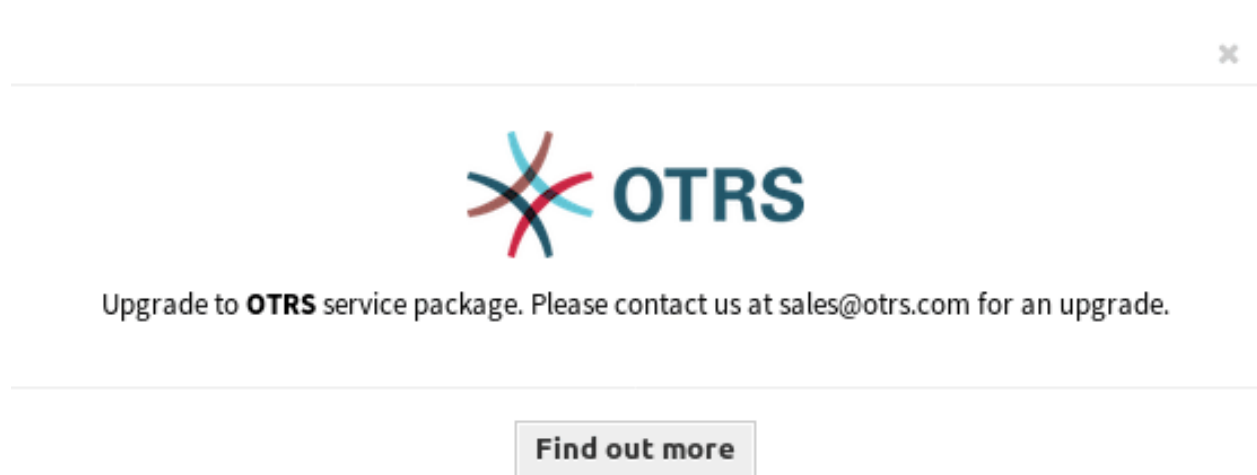
Fig. 5.8: Upgrade Dialog

5.4 New Appointment

Use this menu item to add new appointments to calendars. New appointments can be also added by clicking on the *Add Appointment* button either in *Calendar Overview* or in *Agenda Overview* screens. It is also

possible to drag over a range of the calendar widget to setup a rough time span. Right after that, a dialog appears where the data can be inserted.

5.4.1 Appointment Settings

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

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

Description Add additional information to this resource. It is recommended to always fill this field as a description of the resource with a full sentence for better clarity.

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

> **Ver também:**
>
> This link is configurable through the system configuration option `AgentAppointmentEdit::Location::Link`.

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

Resource

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

Start date The start date of the appointment.

End date The end date of the appointment.

All-day This checkbox indicates that the appointment takes place on the whole day. If it is checked, time of the start date and the end date will be disabled and set to 00:00.

Repeat Define appointment recurrences and will be described separately, see *Repeating Appointments* below.

Notification Define time periods an appointment notification should be sent before the appointment start.

> **Ver também:**
>
> Appointment notifications can be set in admin interface. Please contact your administrator.

Ticket Tickets and other objects can be linked to the appointment with this search field.

> **Nota:** Usage of wildcards (*) is also possible. Enter two asterisks (**) to list all tickets.

Repeating Appointments

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

To create repeating appointments:

1. Select *Start date* and *End date* (or check *All day*).

Fig. 5.9: Appointment Dialog

2. Select from the pre-defined frequencies of the occurrences or choose *custom* settings.

3. Choose either a date to repeat until or an amount of times to repeat.

Fig. 5.10: Repeating Appointments

After all decisions are made and the settings are saved successfully, the appointment will be marked as recurring appointment. The parent appointment will be marked with circle-arrow-symbol and the child appointments with a chain-symbol.
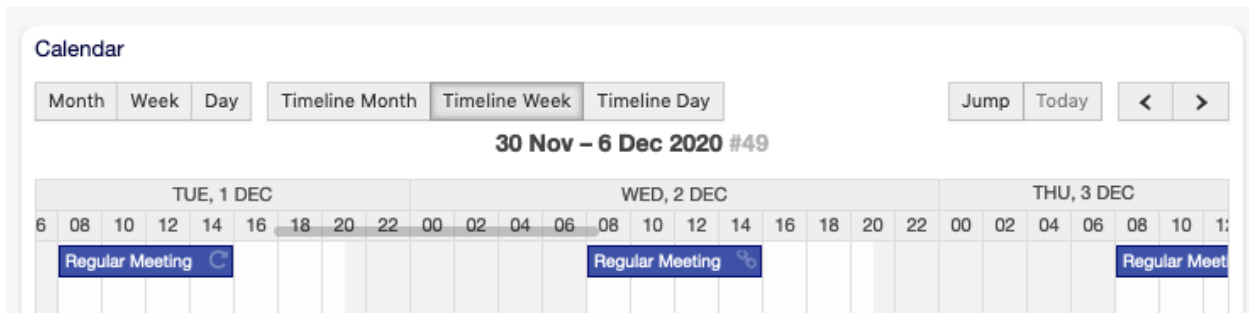
Fig. 5.11: Repeating Appointments Overview

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

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

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

The enabled repeating option will be additionally displayed in the tool-tip of the related appointments.
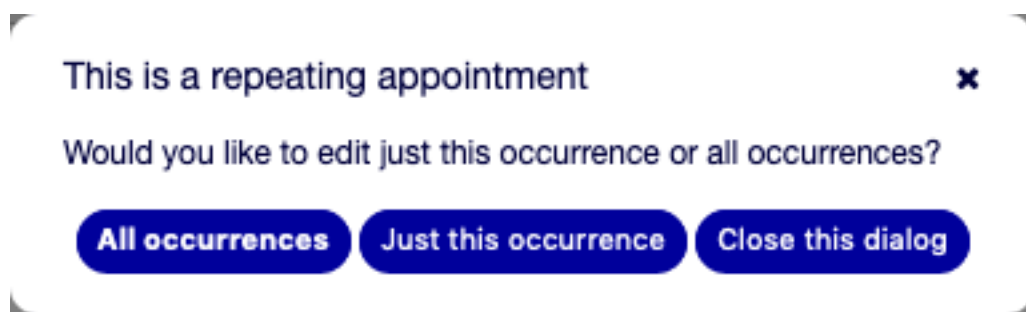
Fig. 5.12: Edit Repeating Appointment

Tickets

A ticket is similar to a medical report created for a hospital patient. When a patient first visits the hospital, a medical report is created to hold all necessary personal and medical information on him. Over multiple visits, as he is attended to by the same or additional doctors, the attending doctor updates the report by adding new information on the patient's health and the ongoing treatment. This allows any other doctors or the nursing staff to get a complete picture on the case at hand. When the patient recovers and leaves the hospital, all information from the medical report is archived and the report is closed.

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

Every ticket is stored and archived with complete information. Since tickets are handled like normal emails, attachments and contextual annotations will also be stored with each email. In addition, information on relevant dates, employees involved, working time needed for ticket resolution, etc. are also saved. At any later stage, tickets can be sorted, and it is possible to search through and analyze all information using different filtering mechanisms.

6.1 Queue View

Use this screen to view tickets in specific queues. The *Queue View* screen is available in the *Queue View* menu item of the *Tickets* menu.

This screen has three different views: small, medium and large. You can change the views with the buttons in the right side of the widget: *S* means *small*, *M* means *medium* and *L* means *large*.

Each view has a filter in the top of the widget to list tickets only in a specific queue or tickets in *My Queues* set in *Personal Preferences*.

There are also filters to view *All tickets* or only *Available tickets*.

Fig. 6.1: Ticket Zoom Screen

Fig. 6.2: Queue View Widget Header

All tickets This option lists all tickets in the selected queue.

Available tickets This option lists only open tickets which are available for working with them.

6.1.1 Small Queue View
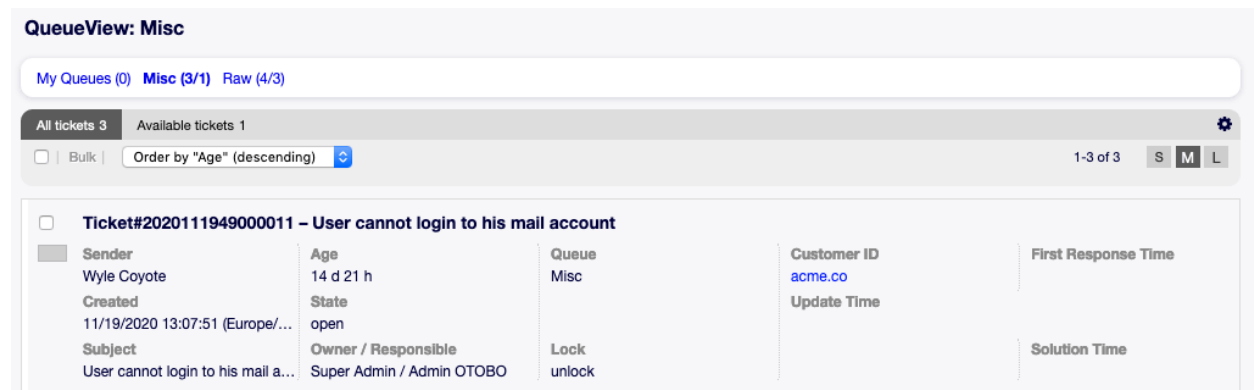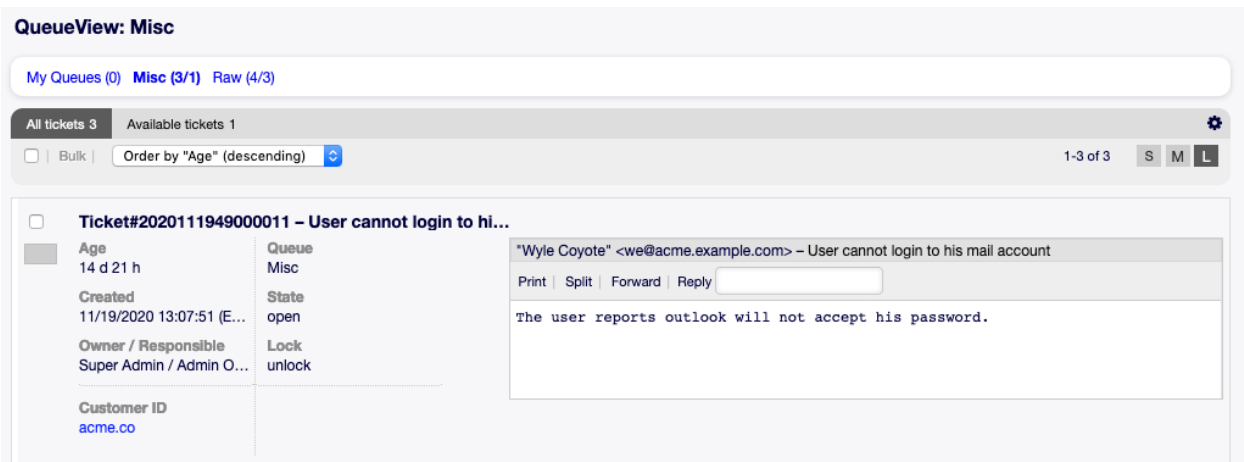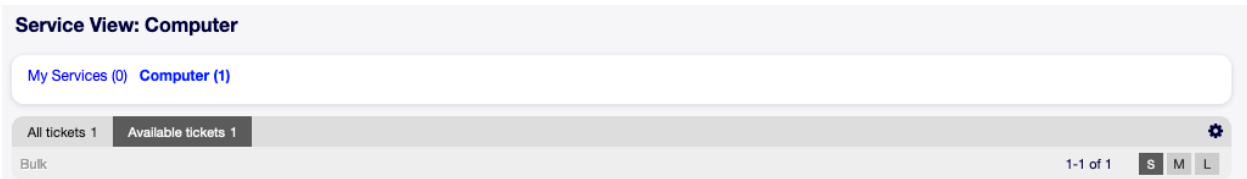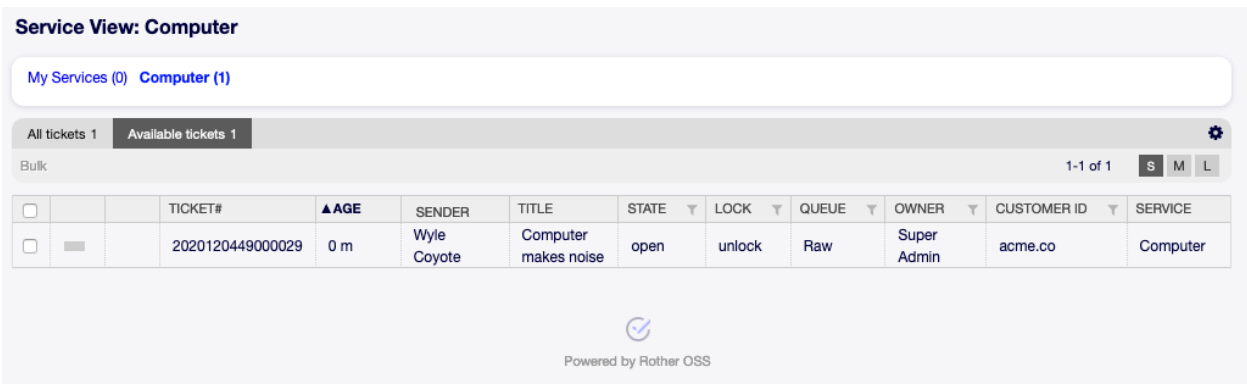
This view lists tickets in a table format.
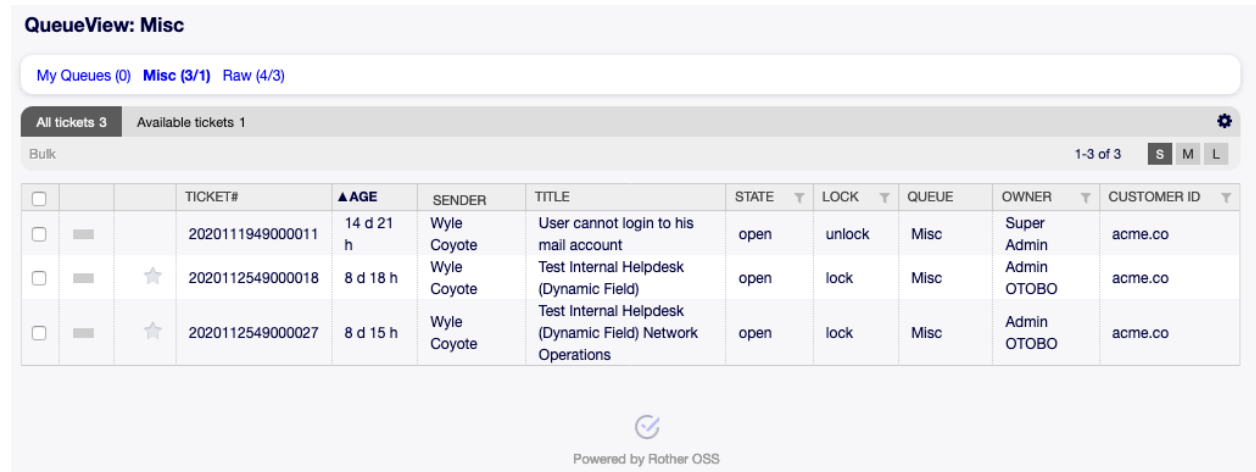
Fig. 6.3: Small Queue View Screen

To limit the number of displayed tickets per page:

1. Click on the gear icon in the top right corner of the overview header.
2. Select the maximum number of tickets displayed per page.
3. Click on the *Save* button.

To set the displayed columns and adjust order of columns:

1. Click on the gear icon in the top right corner of the overview header.
2. Move columns from *Available Columns* to *Visible Columns* or vice versa.
3. Rearrange columns in *Visible Columns* by drag and drop.
4. Click on the *Save* button.

Nota: Use the filter box to find a particular column in *Available Columns* by just typing the name to filter.

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

To sort tickets:

1. Click on a column header to sort tickets by the selected attribute.
2. Click on the column header again to change the sort order.

It is possible to filter tickets by a specific attribute, but not all attributes can be used as filter. The filterable attributes are marked with a filter icon in the column header.
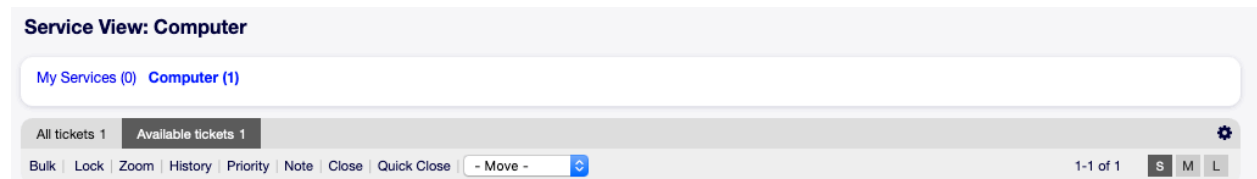
To filter tickets:

1. Click on the filter icon in the column header.

---

2. Select a value for the filter.

Nota: Multiple filters can be set. Active filters are marked with a bold filter icon in the column header and a trash icon is displayed in the widget header. Click on this trash icon to remove all active filters.

This view has an own menu to manage tickets. Select a checkbox in the row of a ticket to see this menu.

Bulk Bulk action for the ticket, multiple attributes can be changed (see below).

Unlock Unlock a ticket to give it back to the queue.

Zoom Open the *Ticket Zoom* screen to see all details of the ticket.

History A new window will be opened that displays the history of the ticket.

Note New note can be added to the ticket.

Close Close this ticket.

Quick Close Close this ticket by one click.

Move The ticket can be moved to an other queue.

6.1.2 Medium Queue View

This view lists tickets in a list view format.

Fig. 6.4: Medium Queue View Screen

To limit the number of displayed tickets per page:

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of tickets displayed per page.

3. Click on the *Save* button.

Hover the mouse over the ticket row, and a floating menu will appear. The floating menu has the same menu items that are already explained in the *Small Queue View* section.
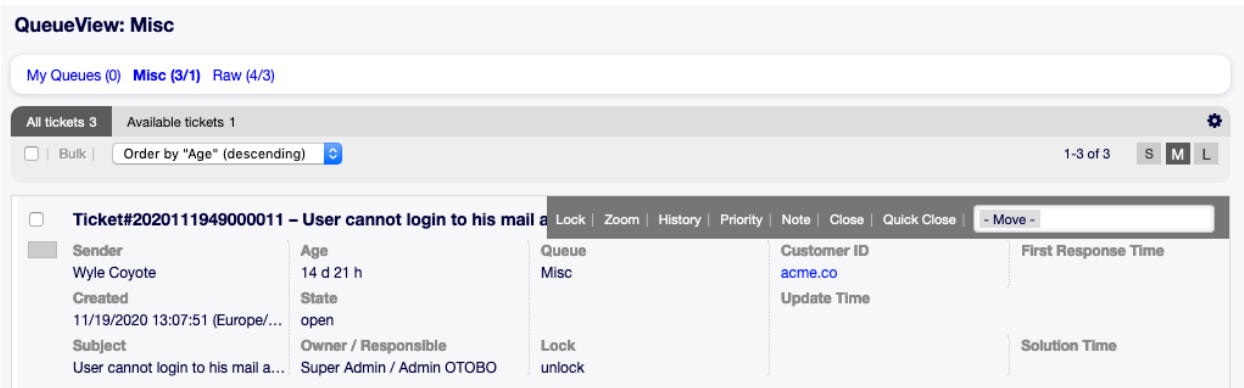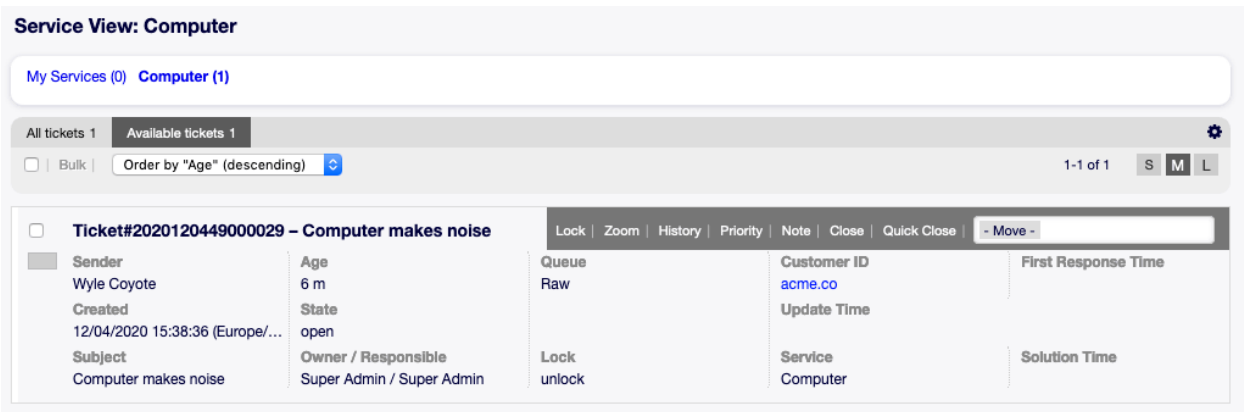

Fig. 6.5: Floating Menu of Medium Queue View

6.1.3 Large Queue View

This view lists tickets in a detailed format.

Fig. 6.6: Large Queue View Screen

To limit the number of displayed tickets per page:

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of tickets displayed per page.

3. Click on the *Save* button.

Hover the mouse over the ticket row, and a floating menu will appear. The floating menu has the same menu items that are already explained in the *Small Queue View* section.
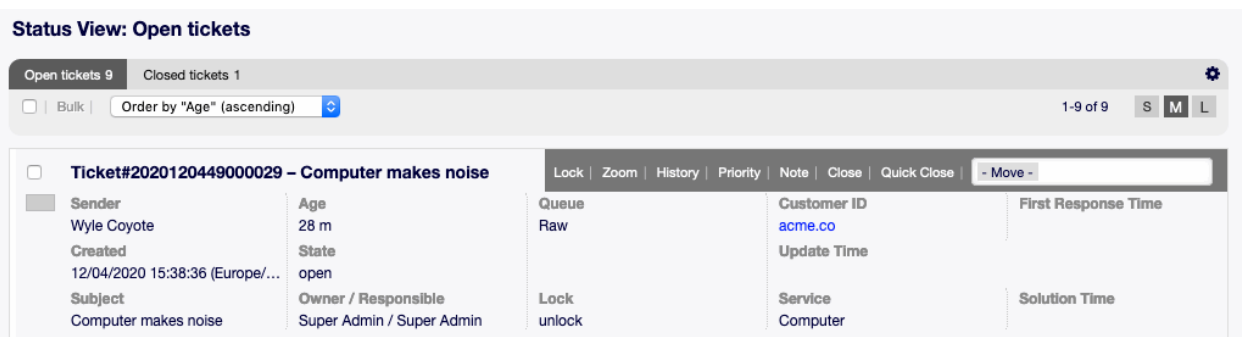
6.1.4 Queue View Bulk Actions

Multiple attributes can be changed in this screen at the same time.
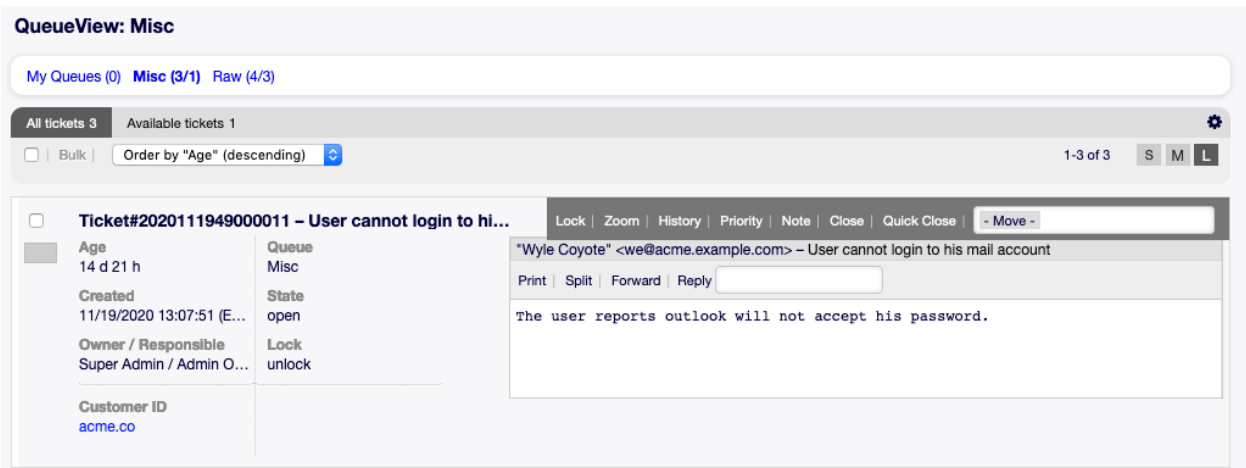
Fig. 6.7: Floating Menu of Large Queue View
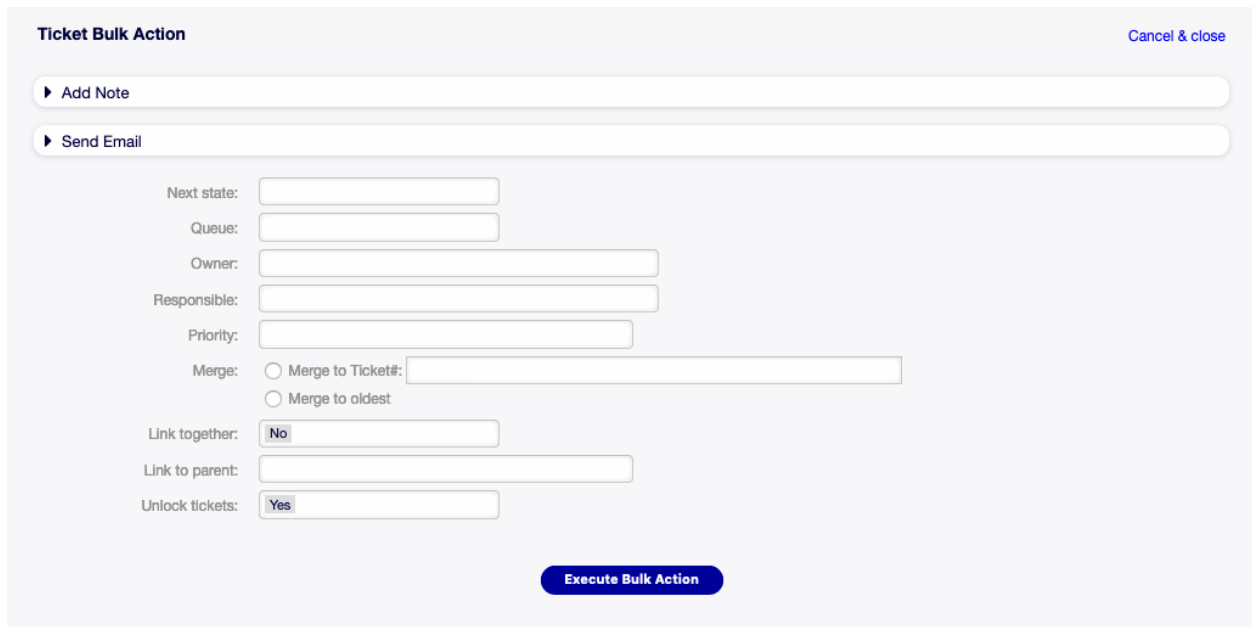
Fig. 6.8: Queue View Bulk Action Screen

6.2 Service View

Ver também:

System configuration `Ticket::Service` needs to be activated to use this feature.

Use this screen to view tickets in specific services. The *Service View* screen is available in the *Service View* menu item of the *Tickets* menu.

This screen has three different views: small, medium and large. You can change the views with the buttons in the right side of the widget: *S* means *small*, *M* means *medium* and *L* means *large*.

Fig. 6.9: Service View Widget Header

Each view has a filter in the top of the widget to list tickets only in a specific service or tickets in *My Services* set in *Personal Preferences*.

There are also filters to view *All tickets* or only *Available tickets*.

All tickets This option lists all tickets in the selected queue.

Available tickets This option lists only open tickets which are available for working with them.

6.2.1 Small Service View

This view lists tickets in a table format.

Fig. 6.10: Small Service View Screen

To limit the number of displayed tickets per page:

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of tickets displayed per page.

3. Click on the *Save* button.

To set the displayed columns and adjust order of columns:

1. Click on the gear icon in the top right corner of the overview header.

2. Move columns from *Available Columns* to *Visible Columns* or vice versa.

3. Rearrange columns in *Visible Columns* by drag and drop.

4. Click on the *Save* button.

Nota: Use the filter box to find a particular column in *Available Columns* by just typing the name to filter.

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

To sort tickets:

1. Click on a column header to sort tickets by the selected attribute.

2. Click on the column header again to change the sort order.

It is possible to filter tickets by a specific attribute, but not all attributes can be used as filter. The filterable attributes are marked with a filter icon in the column header.

To filter tickets:

1. Click on the filter icon in the column header.

2. Select a value for the filter.

Nota: Multiple filters can be set. Active filters are marked with a bold filter icon in the column header and a trash icon is displayed in the widget header. Click on this trash icon to remove all active filters.

This view has an own menu to manage tickets. Select a checkbox in the row of a ticket to see this menu.

Bulk Bulk action for the ticket, multiple attributes can be changed (see below).

Unlock Unlock a ticket to give it back to the queue.

Zoom Open the *Ticket Zoom* screen to see all details of the ticket.

History A new window will be opened that displays the history of the ticket.

Note New note can be added to the ticket.

Close Close this ticket.

Quick Close Close this ticket by one click.

Move The ticket can be moved to an other queue..

6.2.2 Medium Service View

This view lists tickets in a list view format.
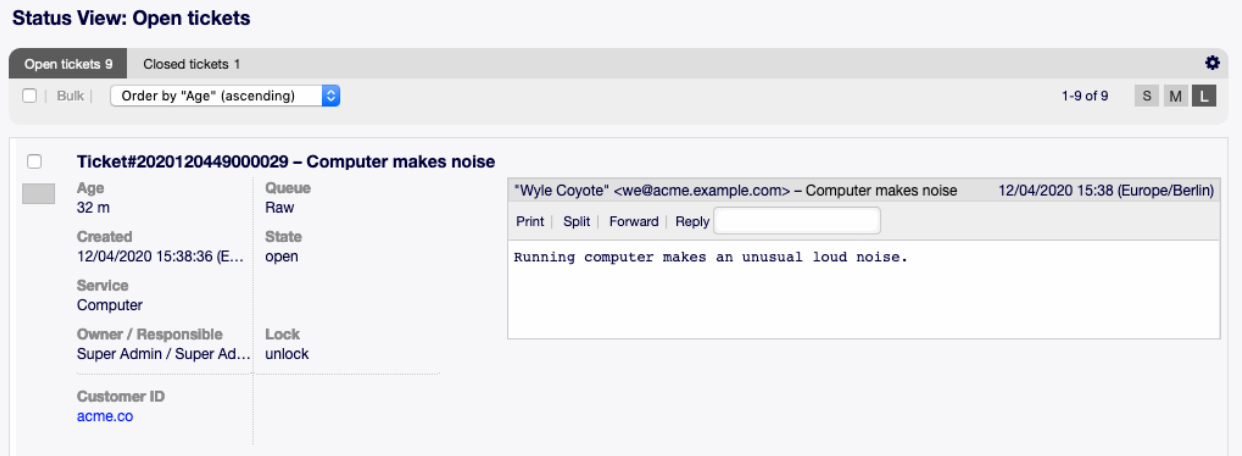
To limit the number of displayed tickets per page:
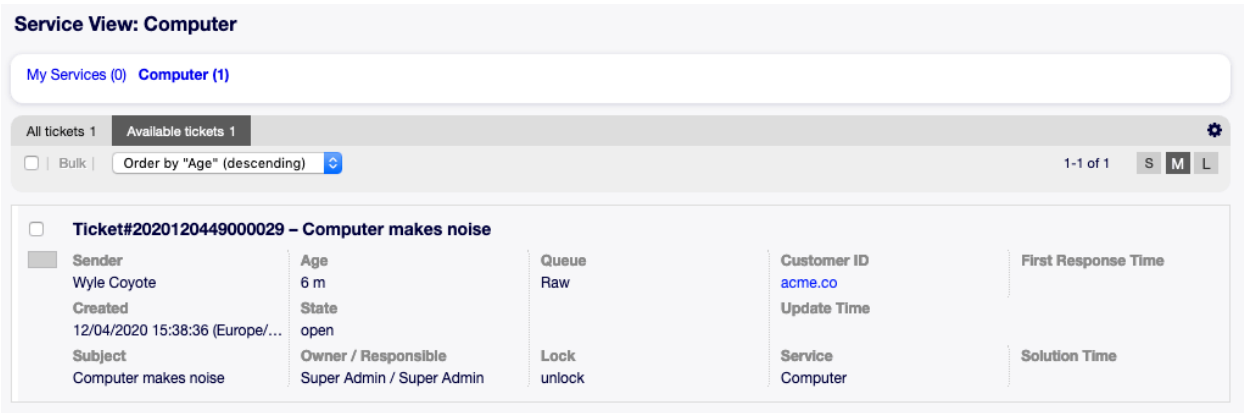
Fig. 6.11: Medium Service View Screen

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of tickets displayed per page.

3. Click on the *Save* button.

Hover the mouse over the ticket row, and a floating menu will appear. The floating menu has the same menu items that are already explained in the *Small Service View* section.
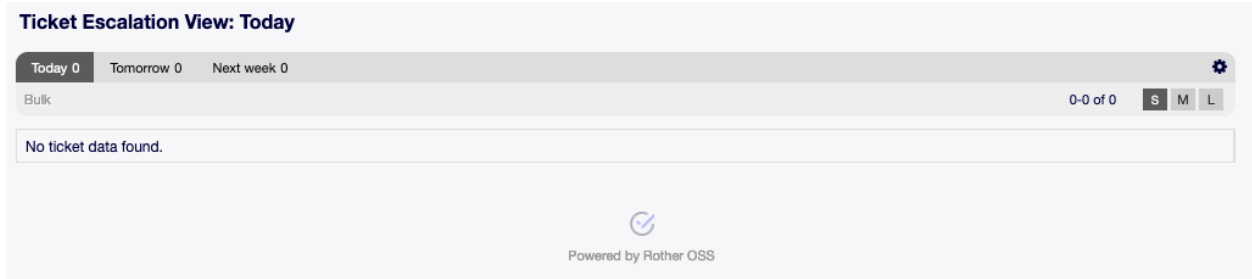

Fig. 6.12: Floating Menu of Medium Service View

6.2.3 Large Service View

This view lists tickets in a detailed format.
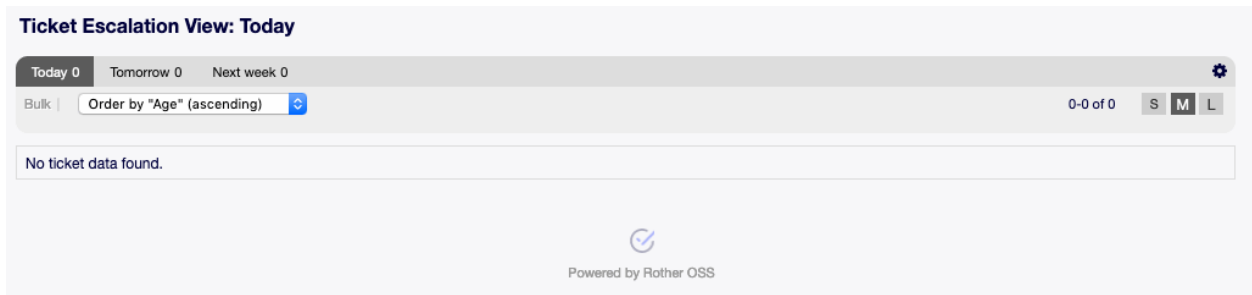
To limit the number of displayed tickets per page:

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of tickets displayed per page.

3. Click on the *Save* button.

Hover the mouse over the ticket row, and a floating menu will appear. The floating menu has the same menu items that are already explained in the *Small Service View* section.
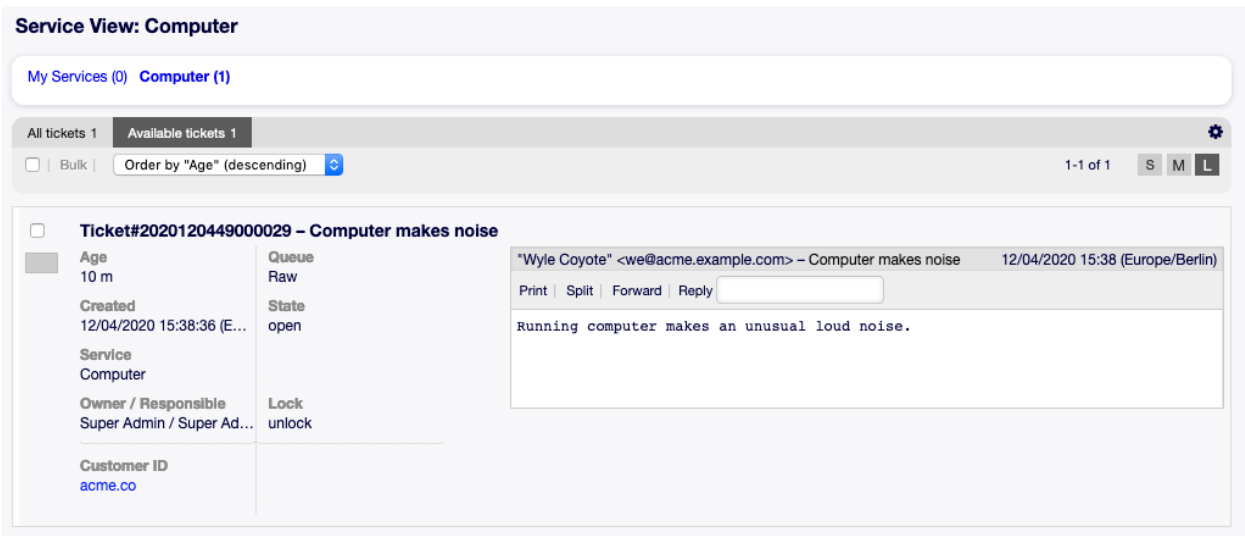
Fig. 6.13: Large Service View Screen

Fig. 6.14: Floating Menu of Large Service View

6.2.4 Service View Bulk Actions

Multiple attributes can be changed in this screen at the same time.

Fig. 6.15: Service View Bulk Action Screen

6.3 Status View

Use this screen to view tickets in specific states. The *Status View* screen is available in the *Status View* menu item of the *Tickets* menu.

This screen has three different views: small, medium and large. You can change the views with the buttons in the right side of the widget: *S* means *small*, *M* means *medium* and *L* means *large*.

Fig. 6.16: Status View Widget Header

Each view has a filter in the top of the widget to list tickets only in a specific state.

6.3.1 Small Status View

This view lists tickets in a table format.
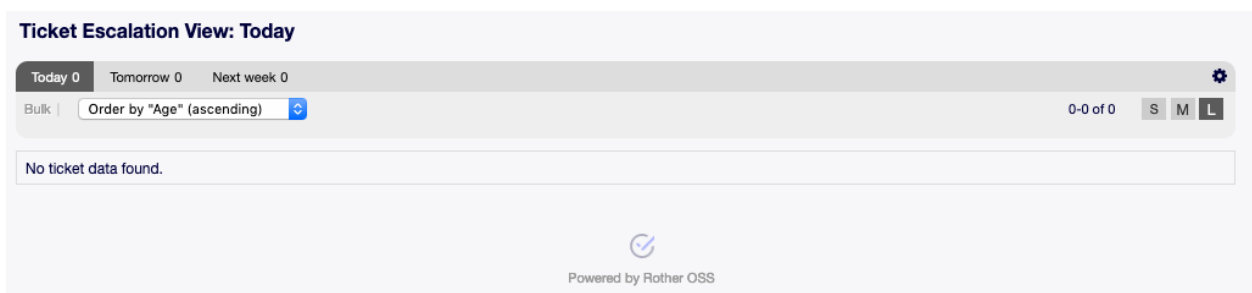
To limit the number of displayed tickets per page:

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of tickets displayed per page.

Fig. 6.17: Small Status View Screen

3. Click on the *Save* button.

To set the displayed columns and adjust order of columns:

1. Click on the gear icon in the top right corner of the overview header.

2. Move columns from *Available Columns* to *Visible Columns* or vice versa.

3. Rearrange columns in *Visible Columns* by drag and drop.

4. Click on the *Save* button.

Nota: Use the filter box to find a particular column in *Available Columns* by just typing the name to filter.

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

To sort tickets:

1. Click on a column header to sort tickets by the selected attribute.

2. Click on the column header again to change the sort order.

It is possible to filter tickets by a specific attribute, but not all attributes can be used as filter. The filterable attributes are marked with a filter icon in the column header.

To filter tickets:

1. Click on the filter icon in the column header.

2. Select a value for the filter.

Nota: Multiple filters can be set. Active filters are marked with a bold filter icon in the column header and a trash icon is displayed in the widget header. Click on this trash icon to remove all active filters.

This view has an own menu to manage tickets. Select a checkbox in the row of a ticket to see this menu.

Bulk Bulk action for the ticket, multiple attributes can be changed (see below).

Unlock Unlock a ticket to give it back to the queue.

Zoom Open the *Ticket Zoom* screen to see all details of the ticket.

History A new window will be opened that displays the history of the ticket.

Note New note can be added to the ticket.

Close Close this ticket.

Quick Close Close this ticket by one click.

Move The ticket can be moved to an other queue.

6.3.2 Medium Status View

This view lists tickets in a list view format.

Fig. 6.18: Medium Status View Screen

To limit the number of displayed tickets per page:

1. Click on the gear icon in the top right corner of the overview header.
2. Select the maximum number of tickets displayed per page.
3. Click on the *Save* button.

Hover the mouse over the ticket row, and a floating menu will appear. The floating menu has the same menu items that are already explained in the *Small Status View* section.

Fig. 6.19: Floating Menu of Medium Status View

6.3.3 Large Status View

This view lists tickets in a detailed format.

To limit the number of displayed tickets per page:

Fig. 6.20: Large Status View Screen

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of tickets displayed per page.

3. Click on the *Save* button.

Hover the mouse over the ticket row, and a floating menu will appear. The floating menu has the same menu items that are already explained in the *Small Status View* section.
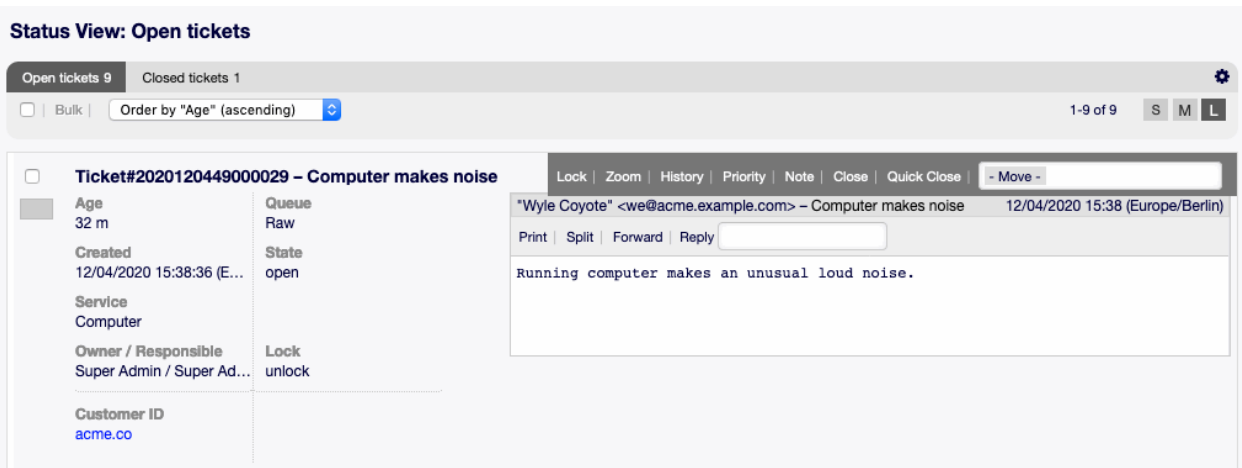
Fig. 6.21: Floating Menu of Large Status View

6.3.4 Status View Bulk Actions

Multiple attributes can be changed in this screen at the same time.

6.4 Escalation View

Use this screen to view tickets in specific escalation time periods. The *Escalation View* screen is available in the *Escalation View* menu item of the *Tickets* menu.

Fig. 6.22: Status View Bulk Action Screen

This screen has three different views: small, medium and large. You can change the views with the buttons in the right side of the widget: *S* means *small*, *M* means *medium* and *L* means *large*.

Fig. 6.23: Escalation View Widget Header

Each view has a filter in the top of the widget to list tickets only in a specific escalation time period.

Today Tickets, that have a deadline today.

Tomorrow Tickets, that have a deadline tomorrow.

Next week Tickets, that have a deadline on the next week.

6.4.1 Small Escalation View

This view lists tickets in a table format.

To limit the number of displayed tickets per page:

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of tickets displayed per page.

3. Click on the *Save* button.

To set the displayed columns and adjust order of columns:

1. Click on the gear icon in the top right corner of the overview header.

2. Move columns from *Available Columns* to *Visible Columns* or vice versa.

Ticket Escalation View: Today

| Today 0 | Tomorrow 0 | Next week 0 | | | ⚙ |
| Bulk | | | 0-0 of 0 | S M L |

No ticket data found.

⊘
Powered by Rother OSS

Fig. 6.24: Small Escalation View Screen

3. Rearrange columns in *Visible Columns* by drag and drop.

4. Click on the *Save* button.

Nota: Use the filter box to find a particular column in *Available Columns* by just typing the name to filter.

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

To sort tickets:

1. Click on a column header to sort tickets by the selected attribute.

2. Click on the column header again to change the sort order.

It is possible to filter tickets by a specific attribute, but not all attributes can be used as filter. The filterable attributes are marked with a filter icon in the column header.

To filter tickets:

1. Click on the filter icon in the column header.

2. Select a value for the filter.

Nota: Multiple filters can be set. Active filters are marked with a bold filter icon in the column header and a trash icon is displayed in the widget header. Click on this trash icon to remove all active filters.

This view has an own menu to manage tickets. Select a checkbox in the row of a ticket to see this menu.

Ticket Escalation View: Today

| Today 0 | Tomorrow 0 | Next week 0 | | | ⚙ |
| Bulk | | | 0-0 of 0 | S M L |

Bulk Bulk action for the ticket, multiple attributes can be changed (see below).

Unlock Unlock a ticket to give it back to the queue.

Zoom Open the *Ticket Zoom* screen to see all details of the ticket.

History A new window will be opened that displays the history of the ticket.

Note New note can be added to the ticket.

Close Close this ticket.

Quick Close Close this ticket by one click.

Move The ticket can be moved to an other queue.

6.4.2 Medium Escalation View

This view lists tickets in a list view format.

Fig. 6.25: Medium Escalation View Screen

To limit the number of displayed tickets per page:

1. Click on the gear icon in the top right corner of the overview header.
2. Select the maximum number of tickets displayed per page.
3. Click on the *Save* button.

Hover the mouse over the ticket row, and a floating menu will appear. The floating menu has the same menu items that are already explained in the *Small Escalation View* section.
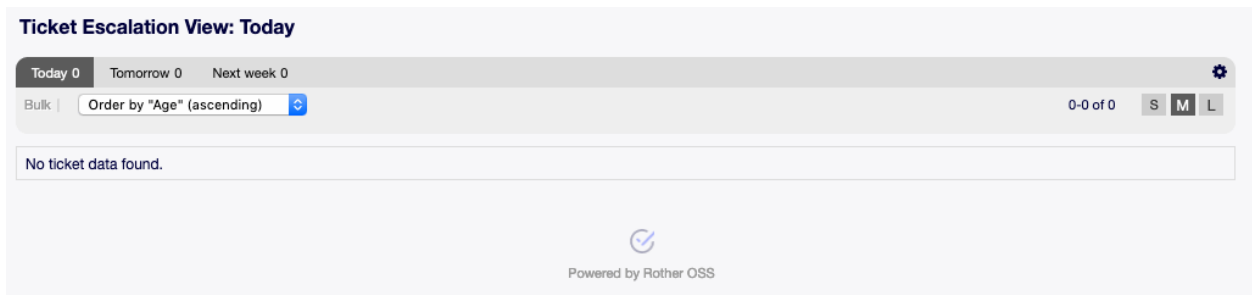
Fig. 6.26: Floating Menu of Medium Escalation View

6.4.3 Large Escalation View

This view lists tickets in a detailed format.

Fig. 6.27: Large Escalation View Screen

To limit the number of displayed tickets per page:

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of tickets displayed per page.

3. Click on the *Save* button.

Hover the mouse over the ticket row, and a floating menu will appear. The floating menu has the same menu items that are already explained in the *Small Escalation View* section.
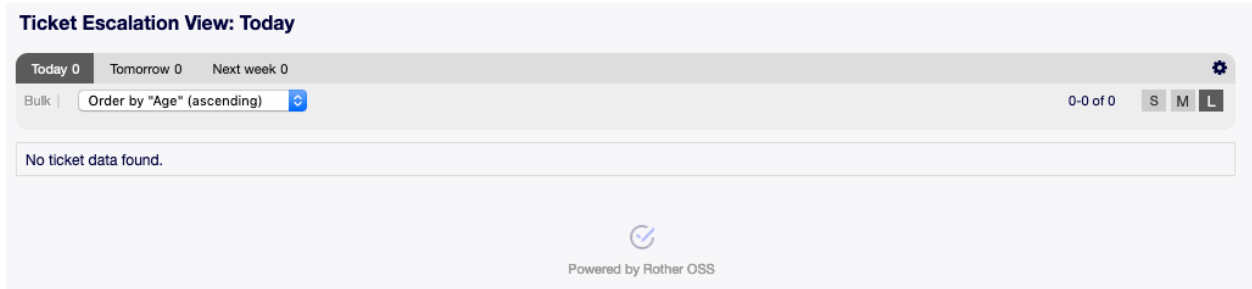
Fig. 6.28: Floating Menu of Large Escalation View

6.4.4 Escalation View Bulk Actions

Multiple attributes can be changed in this screen at the same time.
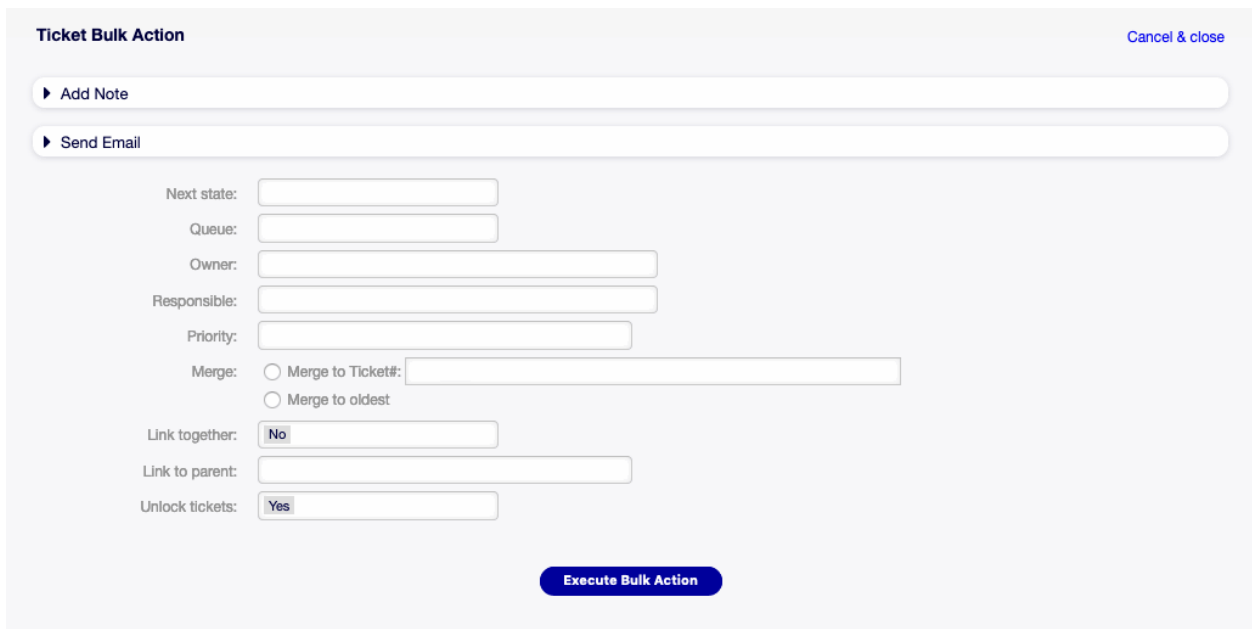
Fig. 6.29: Escalation View Bulk Action Screen

6.5 New Phone Ticket

Use this screen to create tickets based on phone calls. The phone ticket screen is available in the *New Phone Ticket* menu item of the *Tickets* menu.

Fig. 6.30: New Phone Ticket Screen

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

Customer user * The person, to whom the ticket is created for.

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

To queue * The queue, where the new ticket will be placed to.

Service The service category of this ticket.

> **Ver também:**

> This field is available if `Ticket::Service` is enabled.

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

Owner The owner is an agent, who actually works with the new ticket.

> **Ver também:**

> Enable `Ticket::Responsible` setting to set an other agent as responsible for the ticket.

Responsible Select an agent responsible for the ticket.

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

This might be helpful This field is not visible by default, but it displays related *FAQ* articles based on the keywords entered in the *Subject* and/or the *Text* fields. Clicking on a FAQ article opens the *FAQ Zoom* screen.

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

Options It is possible to add other objects like customer users or FAQ articles to the ticket.

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

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

Next ticket state New tickets are in *open* state by default. Select an other state if you want to change it.

Pending date Select a date and time as reminder for the ticket. If the pending time is reached, the ticket can be escalated.

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

Time units (work units) Enter any amount of time units for time accounting.

After all information is collected and set, click on the *Create* button to create the new ticket.

6.6 New Email Ticket

Use this screen to create tickets and send them to customer users. The email ticket screen is available in the *New Email Ticket* menu item of the *Tickets* menu.

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

To customer user * The person, to whom the ticket is created for. This will be the *To* field of the email.

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

Fig. 6.31: New Email Ticket Screen

Cc Select other customer users as carbon copy of the email, if needed.

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

From queue * Select a queue, where the new ticket should be placed to. The queue address will be the *From* field of the email.

Service The service category of this ticket.

> **Ver também:**
>
> This field is available if `Ticket::Service` is enabled.

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

Owner The owner is an agent, who actually works with the new ticket.

> **Ver também:**
>
> Enable `Ticket::Responsible` setting to set an other agent as responsible for the ticket.

Responsible Select an agent responsible for the ticket.

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

This might be helpful This field is not visible by default, but it displays related *FAQ* articles based on the keywords entered in the *Subject* and/or the *Text* fields. Clicking on a FAQ article opens the *FAQ Zoom* screen.

> The related FAQ articles are displayed as the agent types, so the list of suggested FAQ articles is updated after any word typed into the *Subject* and/or the *Text* fields. The suggested FAQ articles are sorted based on the number of matched keywords.
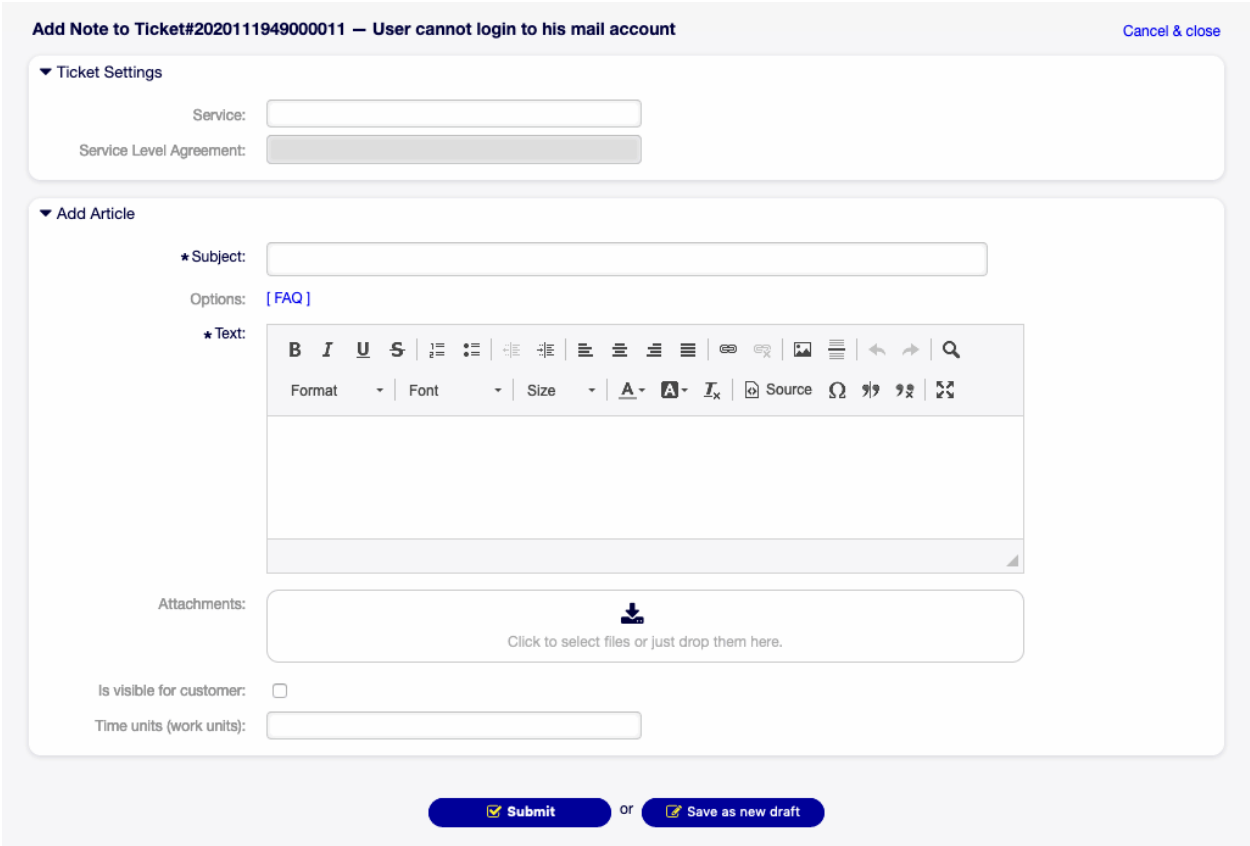
Options It is possible to add other objects like customer users or FAQ articles to the ticket.

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

Signature The signature assigned to the selected queue. Please contact your administrator to change the signature.

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

Next ticket state New tickets are in *open* state by default. Select an other state if you want to change it.

Pending date Select a date and time as reminder for the ticket. If the pending time is reached, the ticket can be escalated.

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

Time units (work units) Enter any amount of time units for time accounting.

After all information is collected and set, click on the *Send mail* button to create the new ticket and send the email to the selected customer users.

6.7 New Process Ticket

Nota: This option is available only, if at least one process is deployed in the system.

Use this screen to create tickets from processes. The process ticket screen is available in the *New Process Ticket* menu item of the *Tickets* menu.

Fig. 6.32: New Process Ticket Screen

The following setting is available when adding this resource. The fields marked with an asterisk are mandatory.

Process * A process needs to be selected from the list to continue.

> **Ver também:**
>
> Processes can be defined in the *Process Management* module of the administrator interface.

After a process is selected, the screen will be refreshed with the first activity dialog of the selected process.
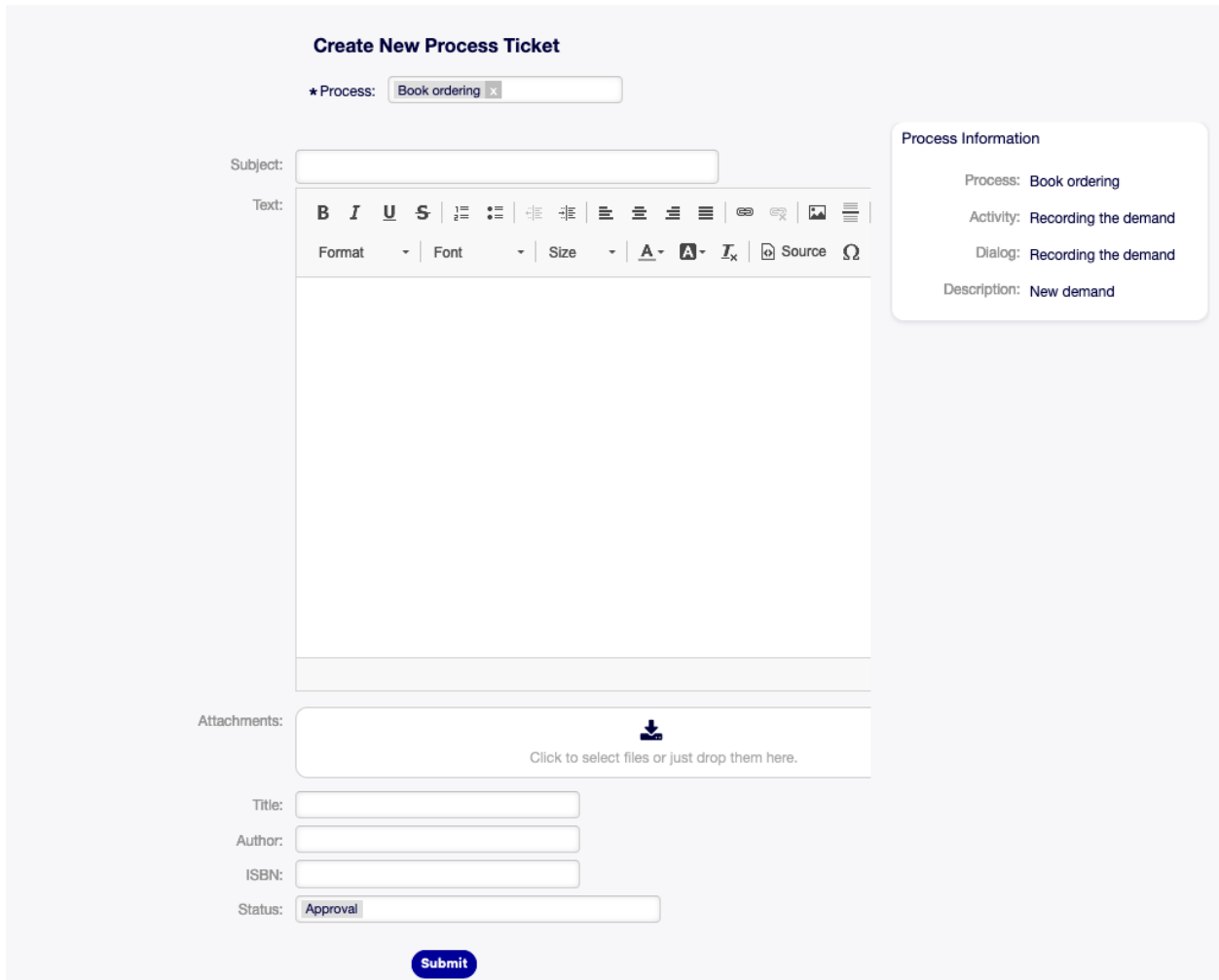
Fig. 6.33: Application For Leave Process Activity Dialog

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

fields.

6.8 Search

Use this screen to search for tickets based on various criteria. The ticket search screen is available in the *Search* menu item of the *Tickets* menu.

Fig. 6.34: Search Dialog

The dialog is divided into three parts: *Templates*, *Filters in use* and *Additional filters*.

6.8.1 Templates

This part of the dialog can be used to save a search template for further usage.

To create a new search template:

1. Click on the *Create New* button.

2. Enter a name for the search template.

3. Add some search criteria.

4. Click on the *Run Search* button.

To use a saved search template:

1. Select a template from the drop-down list.

2. Click on the *Run Search* button.

If only one ticket matches, the *Ticket Zoom* will be opened. Otherwise you will be redirected to *Search Results* screen to see all matched tickets.

To delete a saved search template:

1. Click on the *Delete* button.
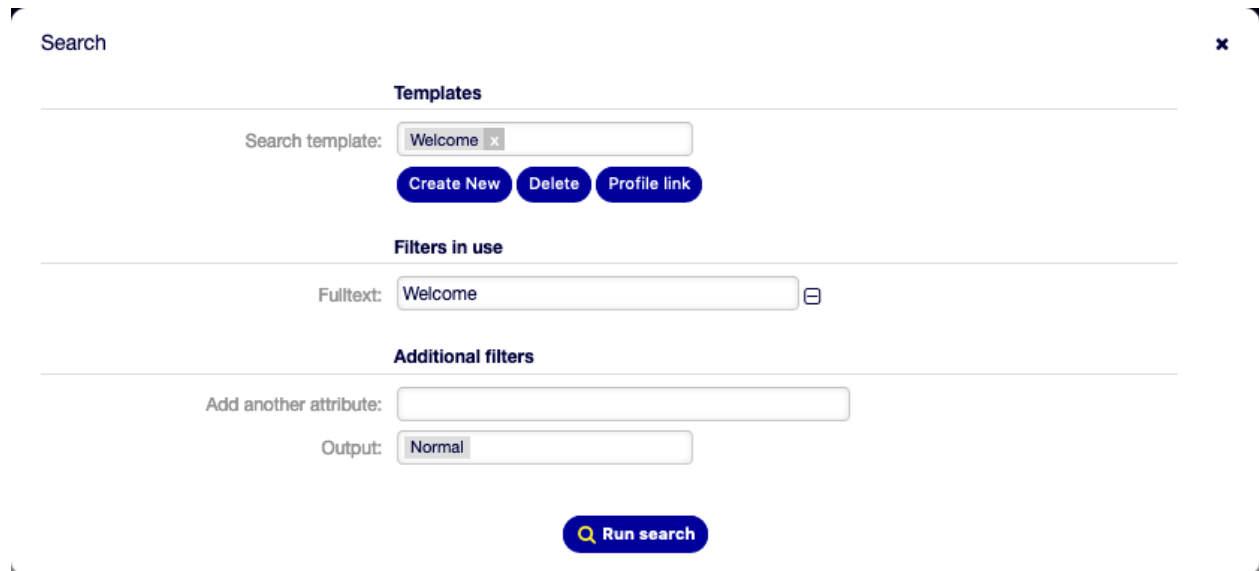
Fig. 6.35: Search Templates Dialog

Aviso: The template will be deleted immediately without confirmation!

Use the *Profile link* button to go directly to *Search Results* screen. This is the permanent link of the search template.
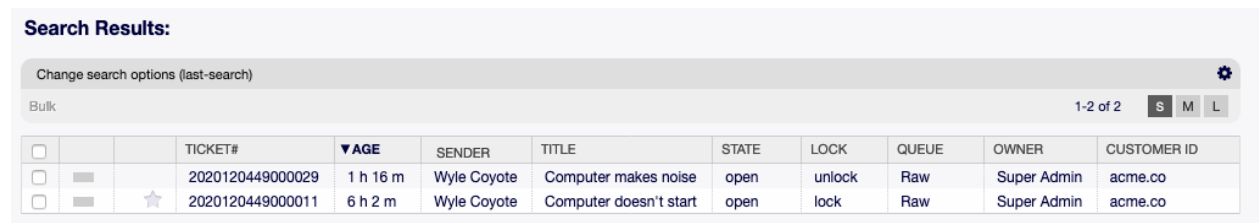
Fig. 6.36: Search Results Screen

6.8.2 Filters in use

This part lists the filters, that are used for the search.

Additional filters can be added in the *Additional filters* part of the screen, and filters can be removed by clicking on the   button next to the field.

6.8.3 Additional filters

This part is for adding more filters and selecting the output format of the results.

Add another attribute Select an extra attribute from the drop-down list to be used in the search.

Output Select the output format of the result.

You can start the search by clicking on the *Run search* button.

6.9 Ticket Zoom

Use this screen to see the details of a ticket. The *Ticket Zoom* screen is available, if you click on a ticket in any other screens.

Fig. 6.37: Ticket Zoom Screen

This screen has an own menu and contains several widgets.

6.9.1 Ticket Menu

The *Ticket Zoom* screen has an own menu.

The menu is extensible and menu items can be grouped into drop-down lists.

Fig. 6.38: Ticket Menu

Back This menu item goes back to the previous screen.

Lock or Unlock The name of the menu item depends on the lock state of the ticket.

> **Lock** If the ticket is unlocked, an agent can lock the ticket and the agent becomes the ticket owner.

> **Unlock** If the ticket is locked to an agent, the agent can release the ticket and other agents can lock it.

> > **Aviso:** This menu item has no confirmation window. Lock or unlock the ticket is done immediately.

Print This menu item opens a PDF file to show the printer friendly version of the screen. You can save or print this PDF file.

Priority This menu item opens a new window to change the priority of the ticket.

Fig. 6.39: Change Priority Screen

> **Priority** Select the new priority for the ticket.

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

> **Options** It is possible to add other objects like customer users or FAQ articles to the ticket.

> **Text *** The body text of the note to be added to the ticket.

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

> **Is visible for customer** Define, if the note is an internal note or customer can view it.

> **Time units (work units)** Enter any amount of time units for time accounting.

People This menu item groups the following menu items together:

    Owner This menu item opens a new window to change the owner of the ticket.

Fig. 6.40: Change Owner Screen

        New Owner * Select the new owner agent from the list. The agent needs *owner* permission, otherwise the agent is not listed.

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

        Options It is possible to add other objects like customer users or FAQ articles to the ticket.

        Text * The body text of the note to be added to the ticket.

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

        Is visible for customer Define, if the note is an internal note or customer can view it.

        Time units (work units) Enter any amount of time units for time accounting.

    Customer This menu item opens a new window to change the customer of the ticket.

        Customer user * The new customer user of the ticket.

        Customer ID Automatically selected based on the customer user.

Communication This menu item groups the following menu items together:

    Note This menu item opens a new window to add a note as new article to the ticket.

        Subject * The subject of the ticket like the subject of an email.
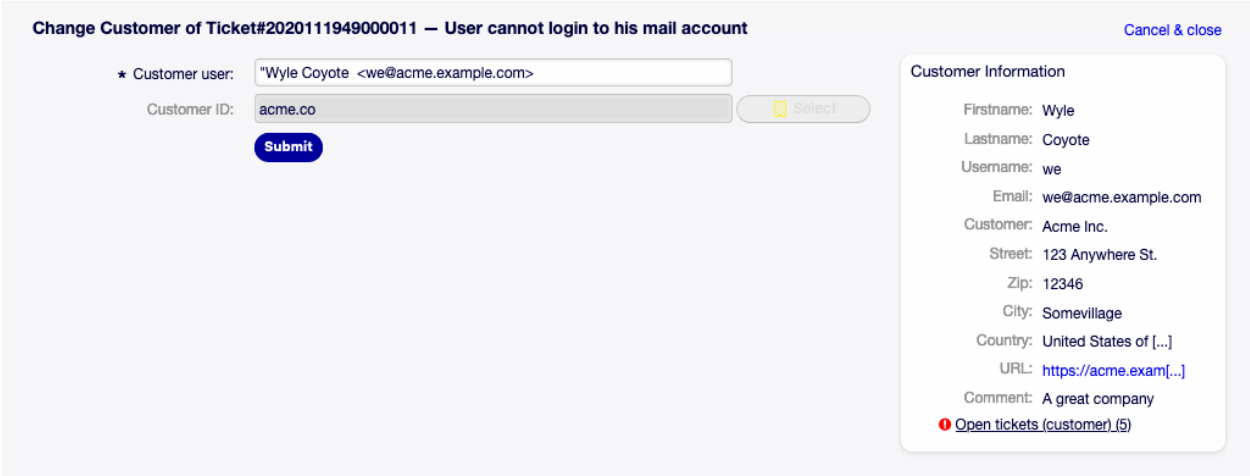
Fig. 6.41: Change Customer Screen

Fig. 6.42: Add Note Screen

Options It is possible to add other objects like customer users or FAQ articles to the ticket.

Text * The body text of the note to be added to the ticket.

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

Is visible for customer Define, if the note is an internal note or customer can view it.

Time units (work units) Enter any amount of time units for time accounting.

Phone Call Outbound This menu item opens a new window to add a note based on an outgoing phone call to the ticket.

Fig. 6.43: Phone Call Screen

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

Options It is possible to add other objects like customer users or FAQ articles to the ticket.

Text * The body text of the note to be added to the ticket.

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

Next ticket state Select an other state if you want to change it.

Pending date Select a date and time as reminder for the ticket. If the pending time is reached, the ticket can be escalated.

Time units (work units) Enter any amount of time units for time accounting.

Phone Call Inbound This menu item opens a new window to add a note based on an incoming phone call to the ticket.

This screen is the same as *Phone Call Outbound* screen.

E-Mail Outbound This menu item opens a new window to send an email and add the email as article to the ticket. This screen is very similar to an email client screen.

Fig. 6.44: Outbound Email Screen

From This field is read only and holds the queue address.

To * This will be the *To* field of the email.

Cc Select other customer users as carbon copy of the email, if needed.

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

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

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

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

Options It is possible to add other objects like customer users or FAQ articles to the ticket.

Text * The body text of the note to be added to the ticket.

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

Next ticket state Select an other state if you want to change it.

Pending date Select a date and time as reminder for the ticket. If the pending time is reached, the ticket can be escalated.

Visible for customer Define, if the note is an internal note or customer can view it.

Time units (work units) Enter any amount of time units for time accounting.

Pending This menu item opens a new window to set the pending time of the ticket.

Fig. 6.45: Set Pending Time Screen

Next state Select the pending state of the ticket.

Pending date Select a date and time as reminder for the ticket. If the pending time is reached, the ticket can be escalated.

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

Options It is possible to add other objects like customer users or FAQ articles to the ticket.

Text * The body text of the note to be added to the ticket.

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

Is visible for customer Define, if the note is an internal note or customer can view it.

Time units (work units) Enter any amount of time units for time accounting.

Close This menu item opens a new window to close the ticket.

Fig. 6.46: Set Pending Time Screen

Next state Select the closed state of the ticket.

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

Options It is possible to add other objects like customer users or FAQ articles to the ticket.

Text * The body text of the note to be added to the ticket.

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

Is visible for customer Define, if the note is an internal note or customer can view it.

Time units (work units) Enter any amount of time units for time accounting.

Quick Close Close the ticket by one click.

Process This menu item opens the *New Process Ticket* screen to start a process from this ticket.

Nota: This option is available only, if at least one process is deployed in the system.

Miscellaneous This menu item groups the following menu items together:

History This menu item opens a new window to see the history of the ticket.

Fig. 6.47: Ticket History Screen

Nota: If several entries are added to the history, use the filter box to find a particular entry by just typing something to filter.

Print This menu item opens a PDF file to show the printer friendly version of the screen. You can save or print this PDF file.

Free Fields This menu item opens a new window to change the free field values of the ticket.

Fig. 6.48: Ticket Free Text Screen

Title * The title of the ticket.

Link This menu item opens the standard link screen of OTOBO. Tickets can be linked to other tickets, FAQ articles or appointments. Existing links can also be managed here.
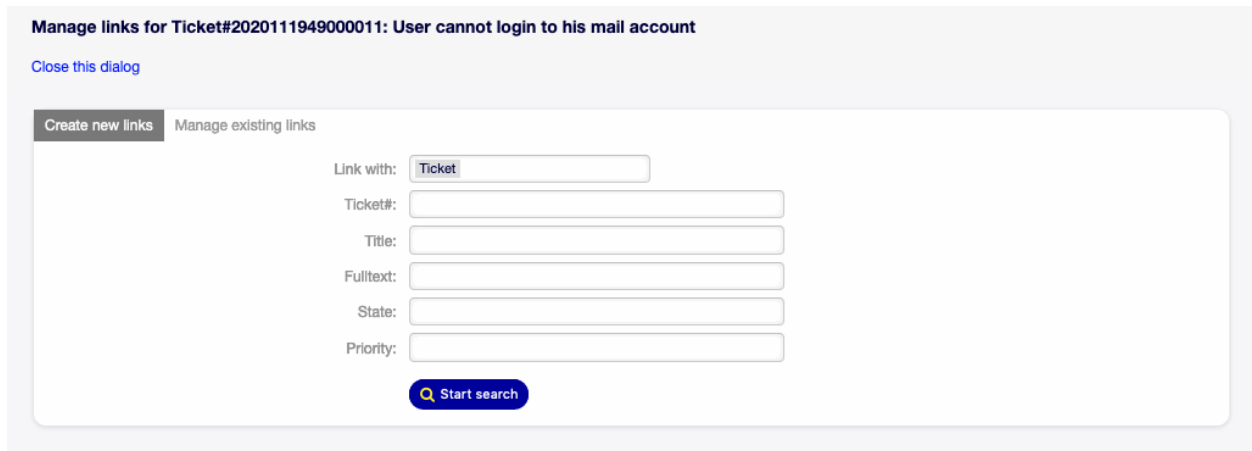
Fig. 6.49: Link Ticket Screen

Link with Select the other object the ticket should be linked to.

The other fields can be used to find the appropriate object to link, and the fields can be different for each object.

Merge This menu item opens a new window to find a destination ticket for the current ticket. The articles of current ticket will be moved to the destination ticket, and the current ticket will get the state *merged*.

Merge to Ticket# * Try typing part of the ticket number or title in order to search by it.

Inform sender Check this box, if you would like to inform sender about ticket merge. If this box is checked, the following fields must be filled.

From This field is read only and holds the queue address.

To * This will be the *To* field of the email.

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

Text * The body text of the email to be sent.

New Appointment This menu item opens the *New Appointment* dialog, and selects the current ticket in the *Ticket* field for linking.

Move This menu item is only a drop-down list of available queues. Select a destination queue, if the ticket needs to be moved there.

> **Aviso:** This menu item has no confirmation window. Moving the ticket to an other queue is done immediately.

Settings Click on the gear icon in the right side of the ticket menu to change the article view settings. The following options are available:

Show one article Only the article is displayed in the *Article Zoom* widget, which is selected in the *Article Overview* widget.

Show all articles All articles are displayed in the *Article Zoom* widget under each other.

Fig. 6.50: Ticket Merge Screen

6.9.2 Article Overview

This widget lists all articles of the ticket in a table.

Fig. 6.51: Article Overview Widget

Most of the columns are sortable by clicking on the header. Click again to change the sort order.

There are three possible colors used to mark the type of article.

- White: the article is visible for the customer user in the external interface and for agents in the agent interface.

- Red: the article is not visible for the customer user in the external interface, but it is visible for agents in the agent interface.

- Yellow: the article is a system message and the visibility can be changed in the system configuration.

Nota: This widget is not displayed in ticket timeline view.

6.9.3 Article Zoom

This widget displays the details of the article. The widget has an own menu.
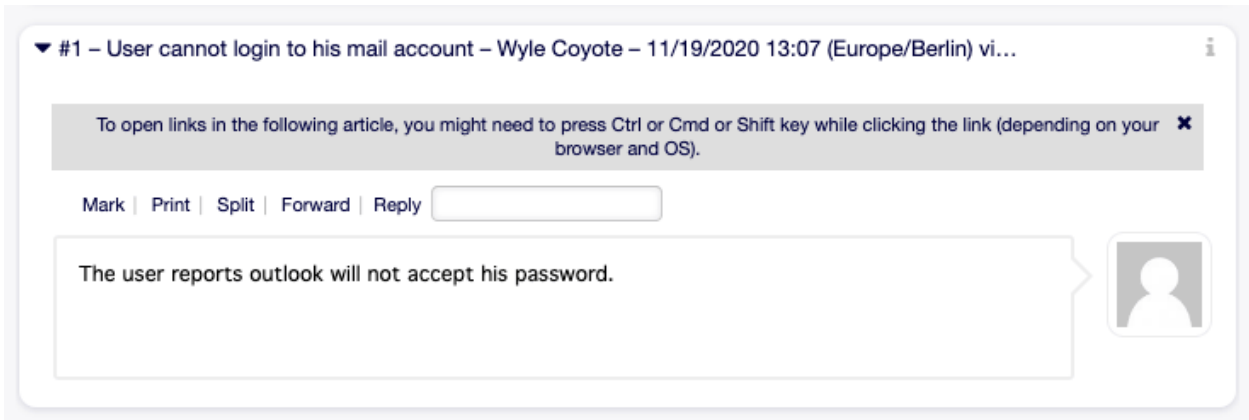
Fig. 6.52: Article Zoom Widget

The menu is extensible and menu items can be grouped into drop-down lists.

Mark or Unmark Use this menu item to mark article as important or to remove the important flag from the article. Important articles have a red information flag in the *Article Overview* widget.

Print This menu item opens a PDF file to show the printer friendly version of the current article. You can save or print this PDF file.

Split Use this menu item to split the article to an other ticket. Select the new ticket type and click on the *Submit* button.
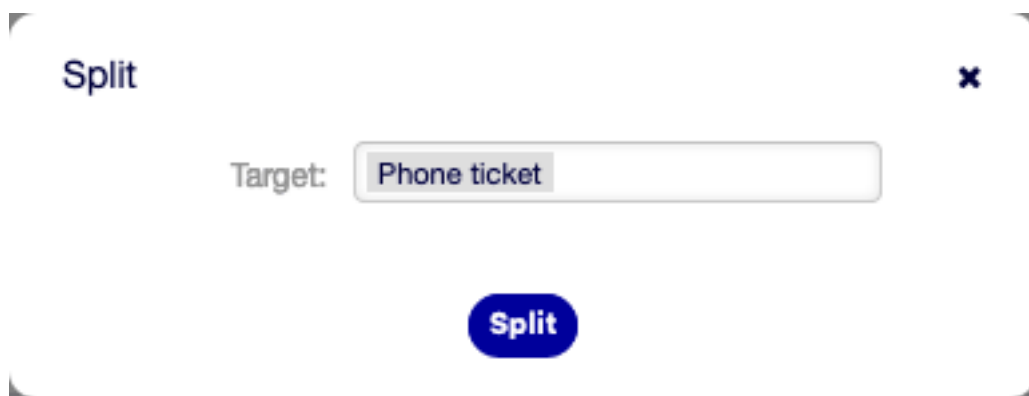
Fig. 6.53: Article Split Dialog

It is possible to split the article into several type of ticket.

Email ticket Selecting this will open the *New Email Ticket* screen and fill in the fields with the current article data.

Phone ticket Selecting this will open the *New Phone Ticket* screen and fill in the fields with the current article data.

Process ticket Selecting this will open the *New Process Ticket* screen and fill in the fields with the current article data.

Nota: This option is available only, if at least one process is deployed in the system.

Forward Use this menu item to forward the article via email.

Fig. 6.54: Article Forward Screen

From This field is read only and holds the queue address.

To * This will be the *To* field of the email.

Cc Select other customer users as carbon copy of the email, if needed.

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

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

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

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

Options It is possible to add other objects like customer users or FAQ articles to the ticket.

Text * The body text of the note to be added to the ticket.

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

Next ticket state Select an other state if you want to change it.

Pending date Select a date and time as reminder for the ticket. If the pending time is reached, the ticket can be escalated.

Visible for customer Define, if the note is an internal note or customer can view it.

Time units (work units) Enter any amount of time units for time accounting.

Reply Use this menu item to compose an answer to the article via email. Reply is created from a response template set in *Templates* module of the administrator interface.

From This field is read only and holds the queue address.

To * This will be the *To* field of the email.

Cc Select other customer users as carbon copy of the email, if needed.

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

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

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

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

Options It is possible to add other objects like customer users or FAQ articles to the ticket.

Text * The body text of the note to be added to the ticket.

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

Next ticket state Select an other state if you want to change it.

Pending date Select a date and time as reminder for the ticket. If the pending time is reached, the ticket can be escalated.

Visible for customer Define, if the note is an internal note or customer can view it.

Time units (work units) Enter any amount of time units for time accounting.

6.9.4 Linked Objects

Tickets can be linked to other objects. Use this widget to see the links between the ticket and other objects.

New links can be added by the *Link* menu item of the *Ticket Zoom* menu. Existing links can also be managed there.

To see the linked object details, click on an entry in this widget.

Ver também:

Fig. 6.55: Compose Answer Screen

Fig. 6.56: Linked Objects Widget

Change setting `LinkObject::ViewMode` to *Complex* to display detailed information about linked objects.

Fig. 6.57: Complex Linked Objects Widget

6.9.5 Ticket Information

This widget contains information about the ticket.

6.9.6 Customer Information

This widget contains information about the customer.
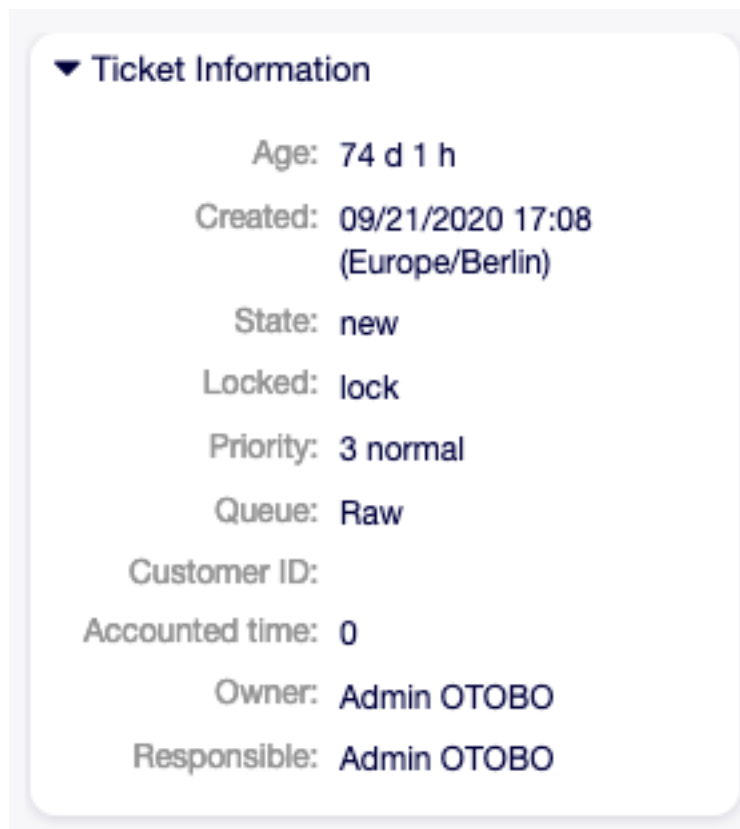
Fig. 6.58: Ticket Information Widget
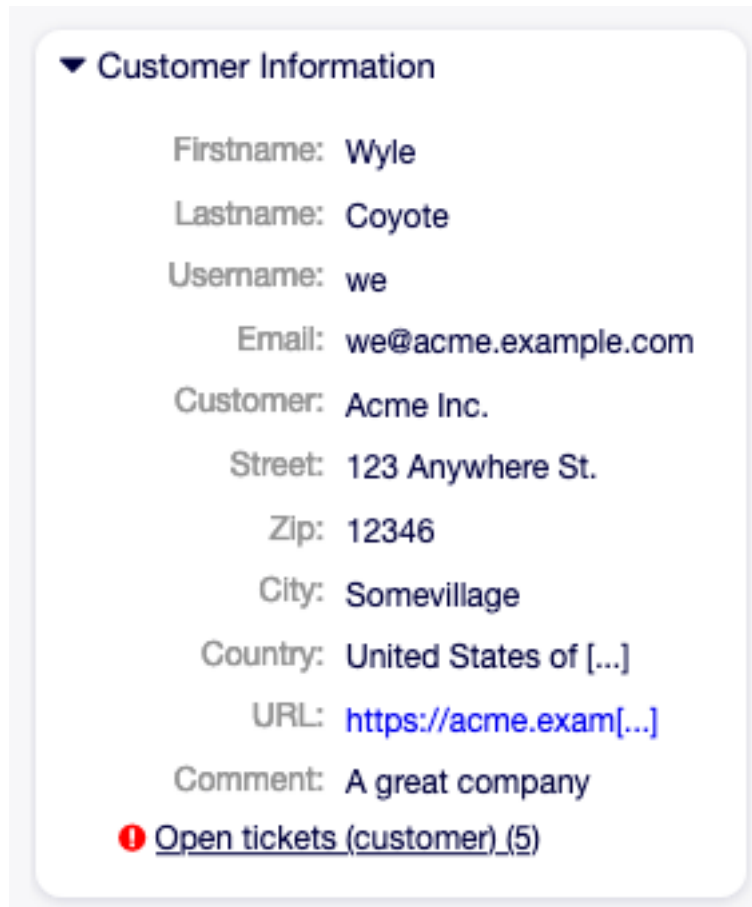
Fig. 6.59: Customer Information Widget

FAQ

FAQ articles contain answers for frequently asked questions, or they contain common knowledge.

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

7.1 Explorer

Use this screen to browse through the FAQ articles. The FAQ explorer is available in the *Explorer* menu item of the *FAQ* menu.

This screen contains several widgets.

7.1.1 FAQ Explorer Content Widgets

The *Subcategories* widget lists all categories and displays the number of subcategories and FAQ articles.

To select a category, just click on the name of a category.

If a category contains at least one FAQ article, the list of FAQ articles will display in the *FAQ Articles* widget. This widget displays some information about the FAQ articles, like *Title*, *Language*, *State* and *Validity*.

To limit the number of displayed FAQ articles per page:

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of changes FAQ articles per page.

3. Click on the *Submit* button.

Clicking on an FAQ article will open the *FAQ Zoom* screen.

Fig. 7.1: FAQ Explorer Screen

Fig. 7.2: FAQ Articles Widget

7.1.2 FAQ Explorer Sidebar Widgets

The right sidebar lists the recently created, updated FAQ articles, as well as the top 10 FAQ articles.
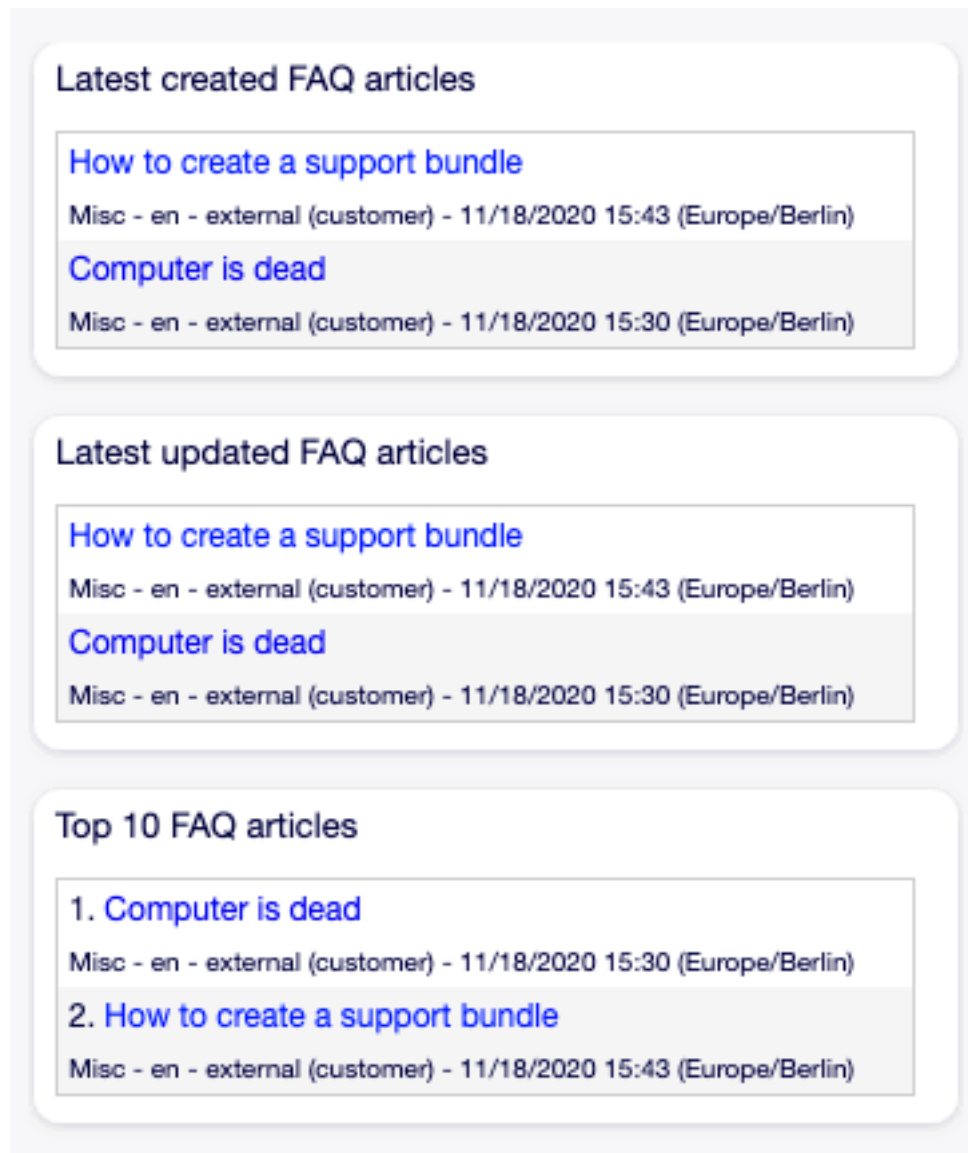
Fig. 7.3: FAQ Explorer Sidebar

The *Latest created FAQ articles* widget displays the FAQ articles, that are created recently.

The *Latest updated FAQ articles* widget displays the FAQ articles, that are updated recently.

The *Top 10 FAQ articles* widget displays the top 10 articles based on its ratings.

To rate an FAQ article:

1. Click on the FAQ article to open the *FAQ Zoom* screen.
2. Scroll down to the bottom of the screen.
3. Click on the *Yes* or *No* button in the *Rating* widget.

Any user can rate an FAQ article only once. The number of positive and negative ratings will be displayed in the right sidebar of *FAQ Zoom* screen.

7.2 New

Use this screen to add new FAQ articles to the system. The FAQ add screen is available in the *New* menu item of the *FAQ* menu.

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

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

Keyword Add some keywords to make it easily to find the FAQ article.

Category * Select a category from the available categories.

> **Ver também:**
>
> Categories can be managed on the *Category Management* screen.

State Select the state of the FAQ article. Possible options are:

> **external (customer)** FAQ article is visible for agents and logged in customer users on the external interface.
>
> **internal (agent)** FAQ article is visible for agents only.
>
> **public (all)** FAQ article is visible for everyone.

Validity 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.

Language Select a language from the available languages.

> **Ver também:**
>
> Languages can be managed on the *Language Management* screen.

Attachment It is possible to add attachments to the FAQ article. Click on the field to add an attachment, or just drop some files here.

Symptom Add a description here, that explains the current situation.

Problem More detailed description about the problem.

Solution How to solve the problem, or what is a workaround to solve it.

Comment Internal text about the current FAQ article for agents only.

7.3 Journal

Use this screen to view the history of all FAQ articles. The FAQ history is available in the *Journal* menu item of the *FAQ* menu.

To limit the number of displayed FAQ articles per page:

1. Click on the gear icon in the top right corner of the overview header.

2. Select the maximum number of changes FAQ articles per page.

Add FAQ Article

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

★ Title:

Keywords:

★ Category: Misc x

State: internal (agent)

Validity: valid

Language: en

Attachment:

Click to select files or just drop them here.

Symptom:
(public)

Problem:
(public)

Solution:
(public)

Fig. 7.5: FAQ Journal Screen

3. Click on the *Save* button.

Clicking on an FAQ article will open the *FAQ Zoom* screen.

7.4 Language Management

Nota: This menu item is only available for agents who have administrator privileges.

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

Fig. 7.6: FAQ Language Management Screen

7.4.1 Manage FAQ Languages

To add a language:

1. Click on the *Add language* button in the left sidebar.

2. Fill in the required field.

3. Click on the *Submit* button.

To edit a language:

1. Click on a language in the list of languages.

2. Modify the field.

3. Click on the *Submit* button.

Fig. 7.7: Add Language Screen

Fig. 7.8: Edit Language Screen

To delete a language:

1. Click on the trash icon in the list of languages.

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

Fig. 7.9: Delete Language Screen

7.4.2 FAQ Language Settings

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

Name * The ISO 639-1 code of a language.

7.5 Category Management

Nota: This menu item is only available for agents who have administrator privileges.

Use this screen to manage categories available in FAQ articles. A fresh OTOBO installation already contains a category by default. The category management screen is available in the *Category Management* menu item of the *FAQ* menu.
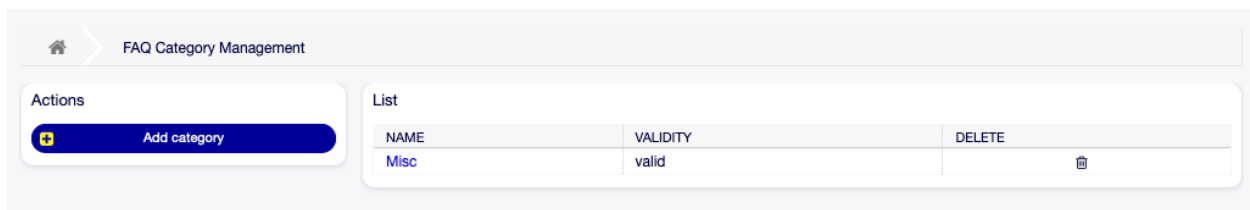
Fig. 7.10: FAQ Category Management Screen

7.5.1 Manage FAQ Categories

To add a category:

1. Click on the *Add category* button in the left sidebar.

2. Fill in the required fields.

3. Click on the *Submit* button.
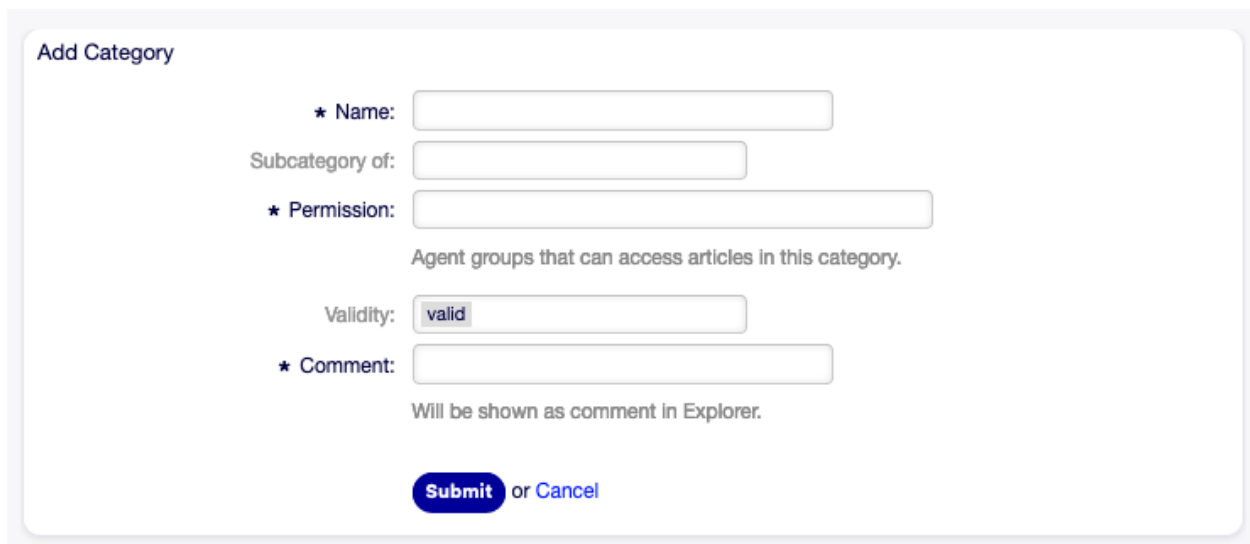
Fig. 7.11: Add Category Screen

To edit a category:

1. Click on a category in the list of categories.

2. Modify the fields.

3. Click on the *Submit* button.

To delete a category:

1. Click on the trash icon in the list of categories.

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

7.5.2 FAQ Category Settings

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

Fig. 7.12: Edit Category Screen

Fig. 7.13: Delete Category Screen

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

Subcategory of It is possible to add the new category under an existing one as sub-category. This will be displayed as *Parent Category::Child Category*.

Permission * Agent groups that can access articles in this category.

Validity 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.

Comment * Add additional information to this resource. It is recommended to always fill this field as a description of the resource with a full sentence for better clarity, because the comment will be also displayed in the overview table.

7.6 Search

Use this screen to search for FAQ articles based on various criteria. The FAQ search screen is available in the *Search* menu item of the *FAQ* menu.

Fig. 7.14: Search Dialog

The dialog is divided into three parts: *Templates*, *Filters in use* and *Additional filters*.

7.6.1 Templates

This part of the dialog can be used to save a search template for further usage.

To create a new search template:

1. Click on the *Create New* button.

2. Enter a name for the search template.

3. Click on the *Add* button.

4. Add some search criteria.

5. Click on the *Run Search* button.

To use a saved search template:

1. Select a template from the drop-down list.

2. Click on the *Run Search* button.
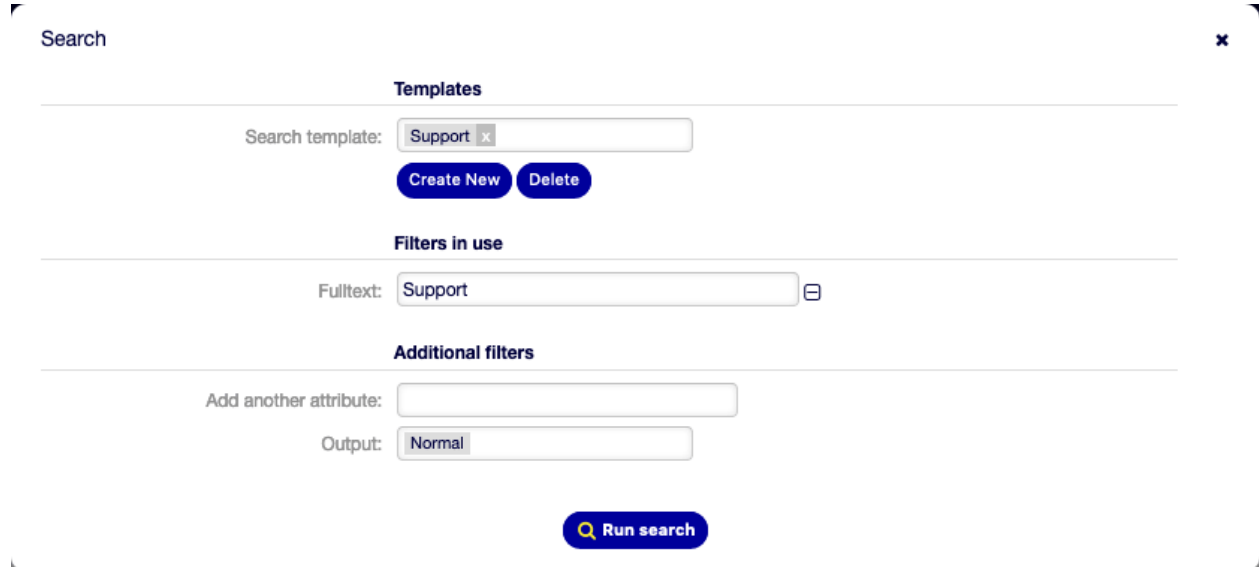
Fig. 7.15: Search Templates Dialog

To modify a search template:

1. Select a template from the drop-down list.

2. Check the *Save changes in template* box.

3. Modify some search criteria.

4. Click on the *Run Search* button.

The results will be opened in *Search Results* screen to see all matched FAQ articles.
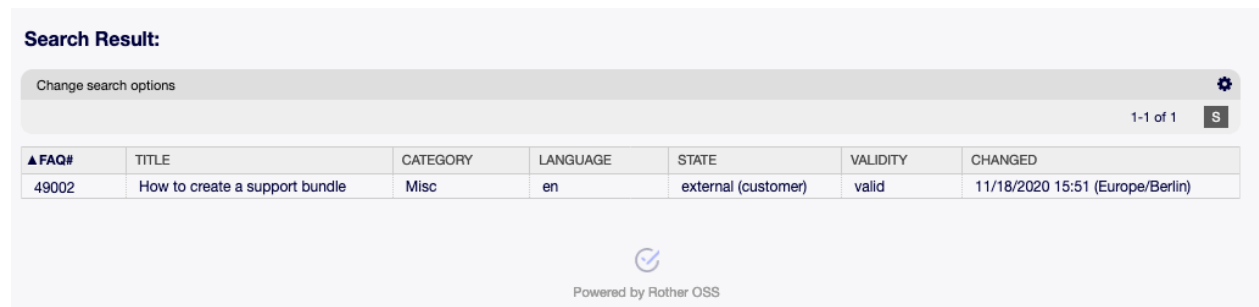
Fig. 7.16: Search Results Screen

Clicking on an FAQ article will open the *FAQ Zoom* screen.

To delete a saved search template:

1. Select a template from the drop-down list.

2. Click on the *Delete* button.

Aviso: The template will be deleted immediately without confirmation!

7.6.2 Filters in use

This part lists the filters, that are used for the search.

Additional filters can be added in the *Additional filters* part of the screen, and filters can be removed by clicking on the button next to the field.

7.6.3 Additional filters

This part is for adding more filters and selecting the output format of the results.

Add another attribute Select an extra attribute from the drop-down list to be used in the search.

Output Select the output format of the result.

You can start the search by clicking on the *Run search* button.

7.7 FAQ Zoom

Use this screen to see the details of an FAQ article. The *FAQ Zoom* screen is available, if you click on an FAQ article in any other screens.

This screen has an own menu and contains several widgets.

7.7.1 FAQ Content

The *FAQ Zoom* screen has an own menu.

Back This menu item goes back to the previous screen.

Edit This menu item opens a new window to edit the FAQ article.

History This menu item opens a new window to see the history of the FAQ article.

Print This menu item opens a PDF file to show the printer friendly version of the screen. You can save or print this PDF file.

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

Delete Use this menu item to delete the FAQ article.

The *Symptom*, *Problem*, *Solution* and *Comment* widgets show the content of the FAQ article.

It is possible to rate an FAQ article in the *Rating* widget, whether the FAQ article is helpful or not. To rate an FAQ article, click on the *Yes* or *No* button in this widget.

Any user can rate an FAQ article only once. The number of positive and negative ratings will be displayed in the right sidebar.

Fig. 7.17: FAQ Zoom Screen

Edit: FAQ: 49002

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

Cancel & close

★ Title:	How to create a support bundle
Keywords:	support bundle generate OTOBO
★ Category:	Misc x
State:	external (customer)
Validity:	valid
Language:	en

Attachment:

⬇
Click to select files or just drop them here.

Symptom:
(public)

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

Problem:
(public)

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

Solution:
(public)

OTOBO 10:

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

Fig. 7.19: FAQ History Screen
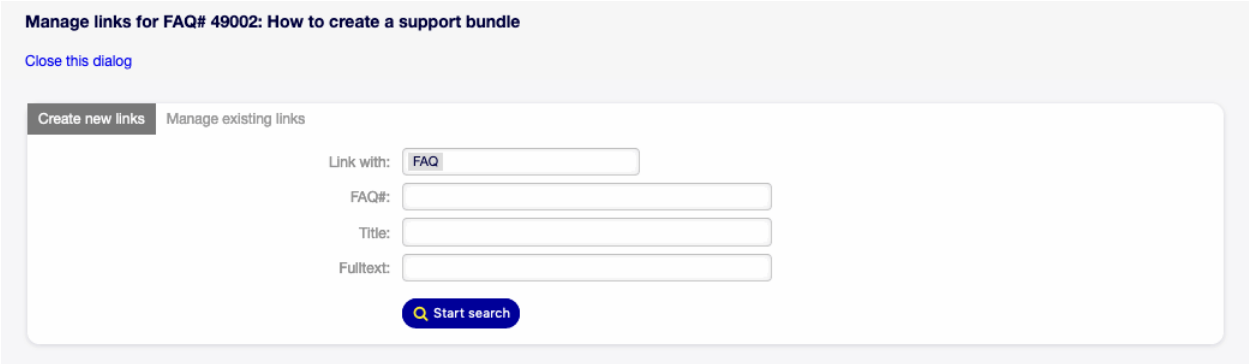
Fig. 7.20: Link FAQ Screen
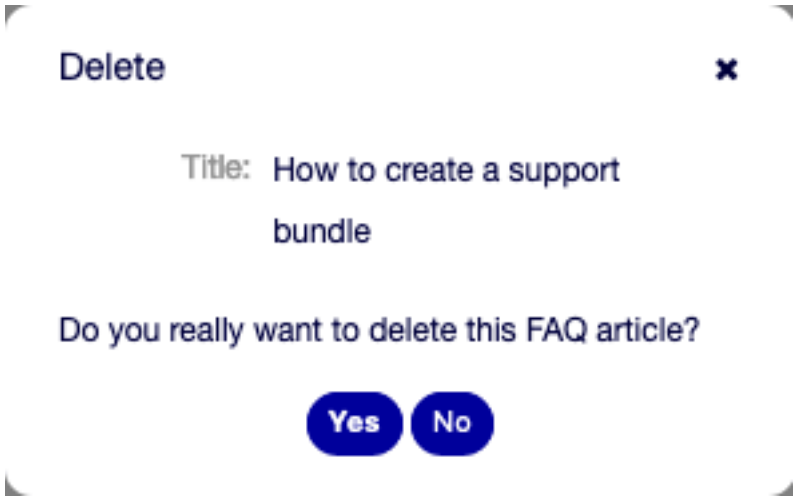
Fig. 7.21: Delete FAQ Dialog

7.7.2 FAQ Sidebar Widgets

The following widgets are located on the right sidebar.

The *FAQ information* widget lists all relevant attributes of the FAQ article.

FAQ articles can be linked to other objects. Use this widget to see the links between the FAQ article and other objects.
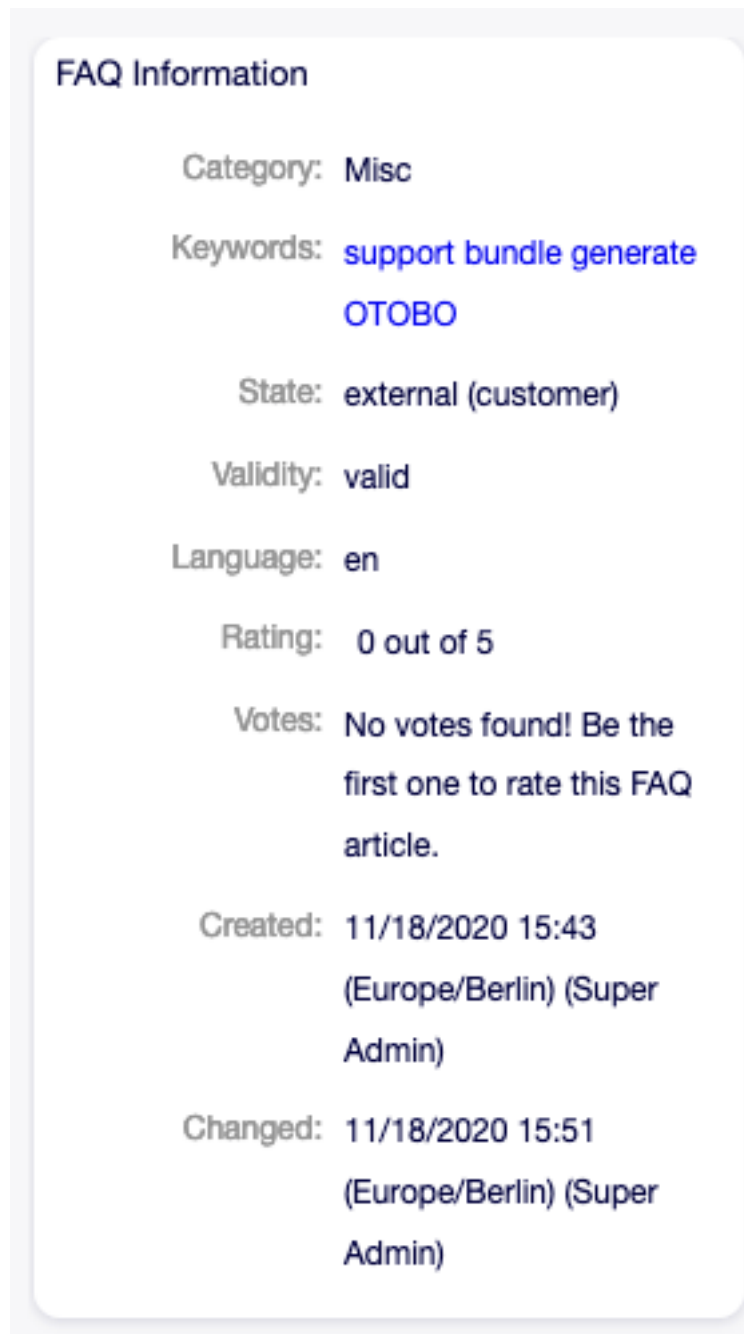
New links can be added by the *Link* menu item of the *FAQ Zoom* menu. Existing links can also be managed there.

To see the linked object details, click on an entry in this widget.

Ver também:

Change setting `LinkObject::ViewMode` to *Complex* to display detailed information about linked objects.

Fig. 7.22: FAQ Information Widget
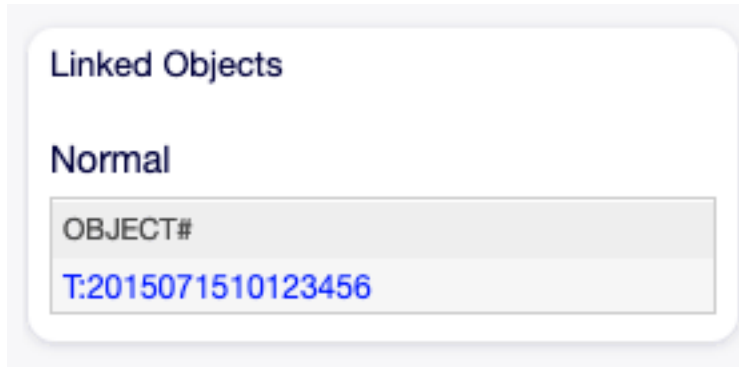
Fig. 7.23: Linked Objects Widget

Fig. 7.24: Complex Linked Objects Widget

Chat

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

Ver também:

System configuration `ChatEngine::Active` needs to be activated to use this feature.

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

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

8.1 Manage Chats

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

Ver também:

System configuration `ChatEngine::Active` needs to be activated to use this feature.

The chat management screen is the central point of the chat feature. Here an agent can manage the chats as well as see and accept open requests. This screen provides a list of chat requests from customer users, public users and other agents, as well as an overview over all active chats.

Use this menu item to manage chats. The chat management screen is available in the *Chat* menu.

Fig. 8.1: Chat Management Screen

Each chat channel can be filtered with the options in the top of the widget to list *All Chat Channels* or only *My Chat Channels* set in *Personal Preferences*.

8.1.1 Start New Chat

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

Agent to Agent

To start a chat with another agent:

1. Use the *Logged-In Users* widget in the dashboard. Agents who are able to use the chat, will have a chat icon next to their name.

Fig. 8.2: Available Agents

2. Click on the chat icon next to an agent name.

3. Write the first message to the *Start Chat* dialog and send the message.

4. After the chat request has been sent to the other agent, watch the chat in the chat management screen. A browser notification is displayed to inform the agent.
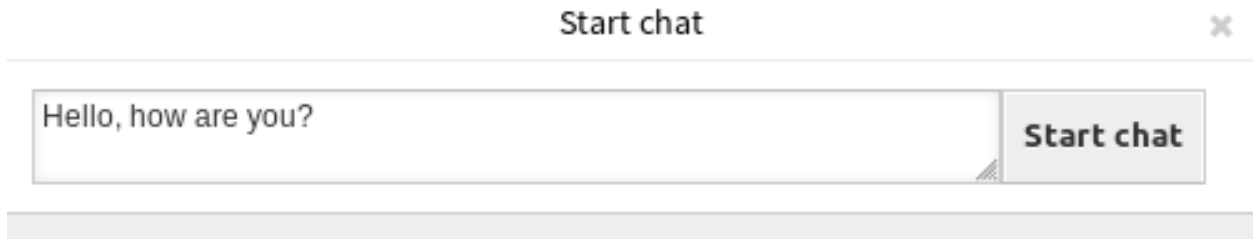
Fig. 8.3: Start Chat Dialog
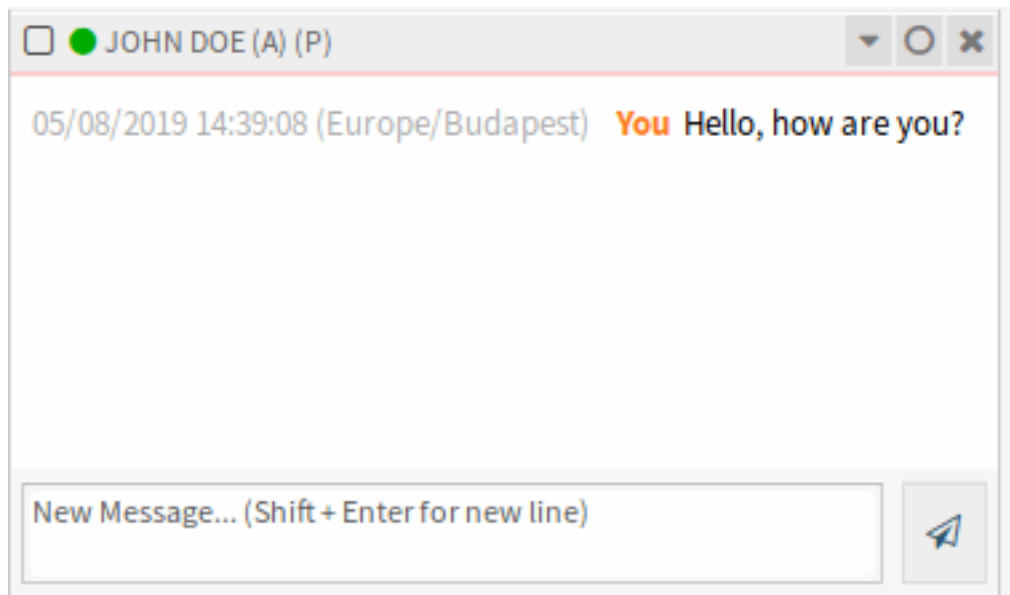
Fig. 8.4: My Active Chats Widget

5. Wait for the answer. The other agent has to accept the chat request with the *Open Chat* link.

Fig. 8.5: Personal Chat Requests For You Widget

6. When the other agent accepts the chat request, you can chat now.
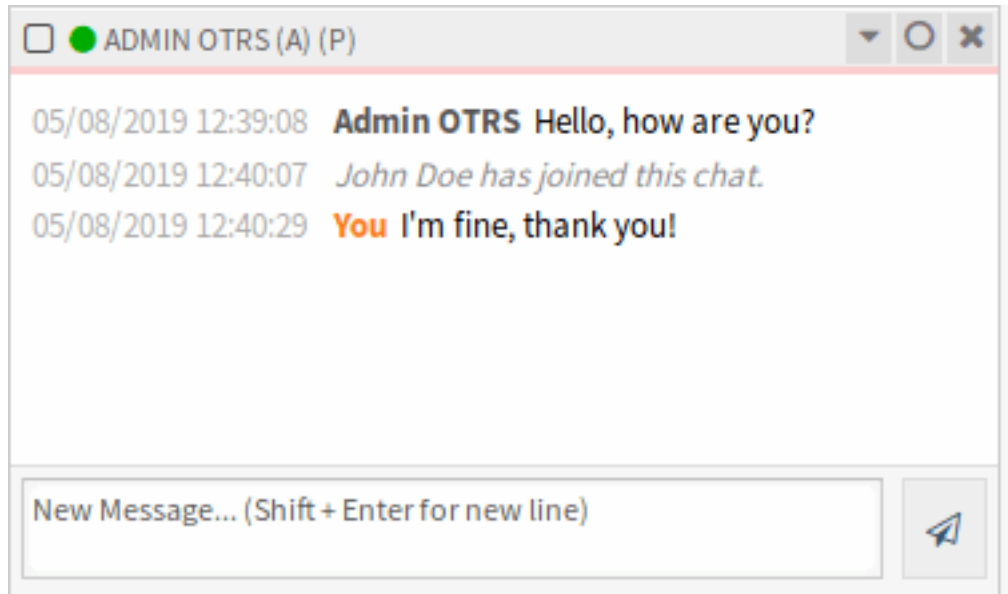
Fig. 8.6: Agent to Agent Chat

Agent to Customer User

To start a chat with a customer user:

1. Use the *Logged-In Users* widget in the dashboard. Customer users who are able to use the chat, will have a chat icon next to their name.
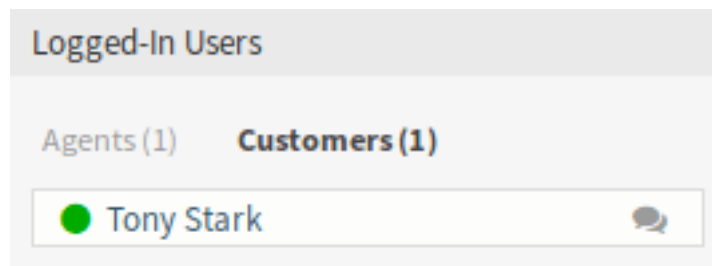
Fig. 8.7: Available Customer Users

Ver também:

Customer users can also be selected in *Customer User Information Center* or from the *Customer Information* widget of the *Ticket Zoom* screen.

2. Click on the chat icon next to a customer user name.

3. Write the first message to the *Start Chat* dialog and send the message.
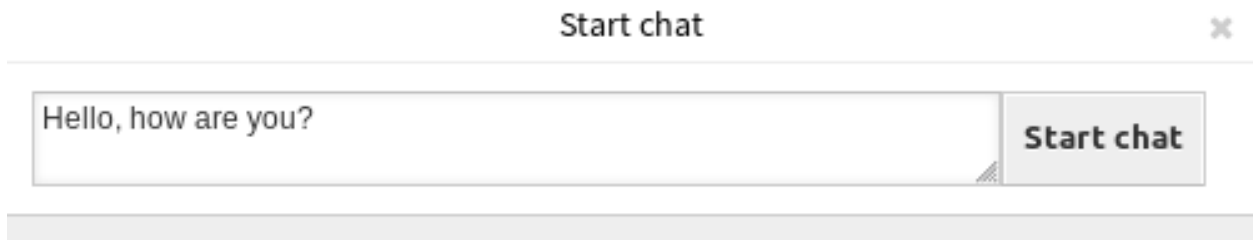
Fig. 8.8: Start Chat Dialog

4. After the chat request has been sent to the other agent, watch the chat in the chat management screen. A browser notification is displayed to inform the agent.
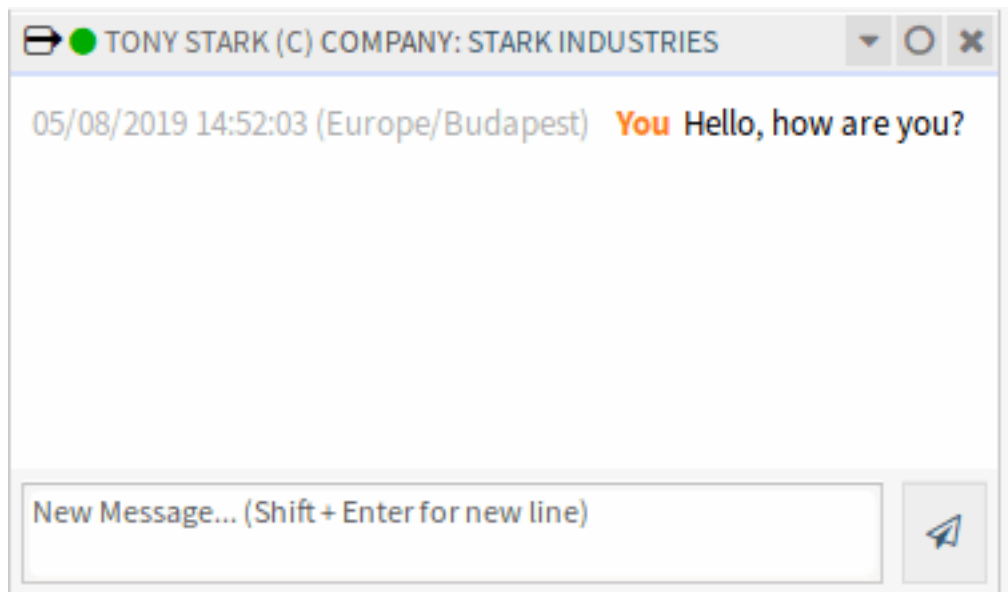
Fig. 8.9: My Active Chats Widget

5. Wait for the answer. The customer user has to accept the chat request which is displayed in the bottom right corner of the external interface.

6. When the customer user accepts the chat request, you can chat now.

7. When the customer user closes the chat, it is possible to send the chat via email or create a ticket from the conversation.

Customer User to Agent

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

To receive a chat request from a customer user:
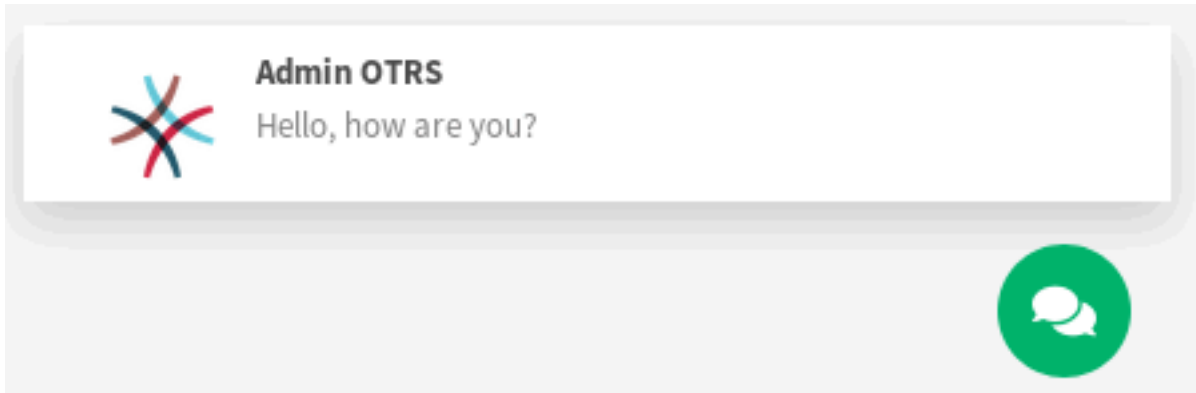
Fig. 8.10: Chat Request on External Interface
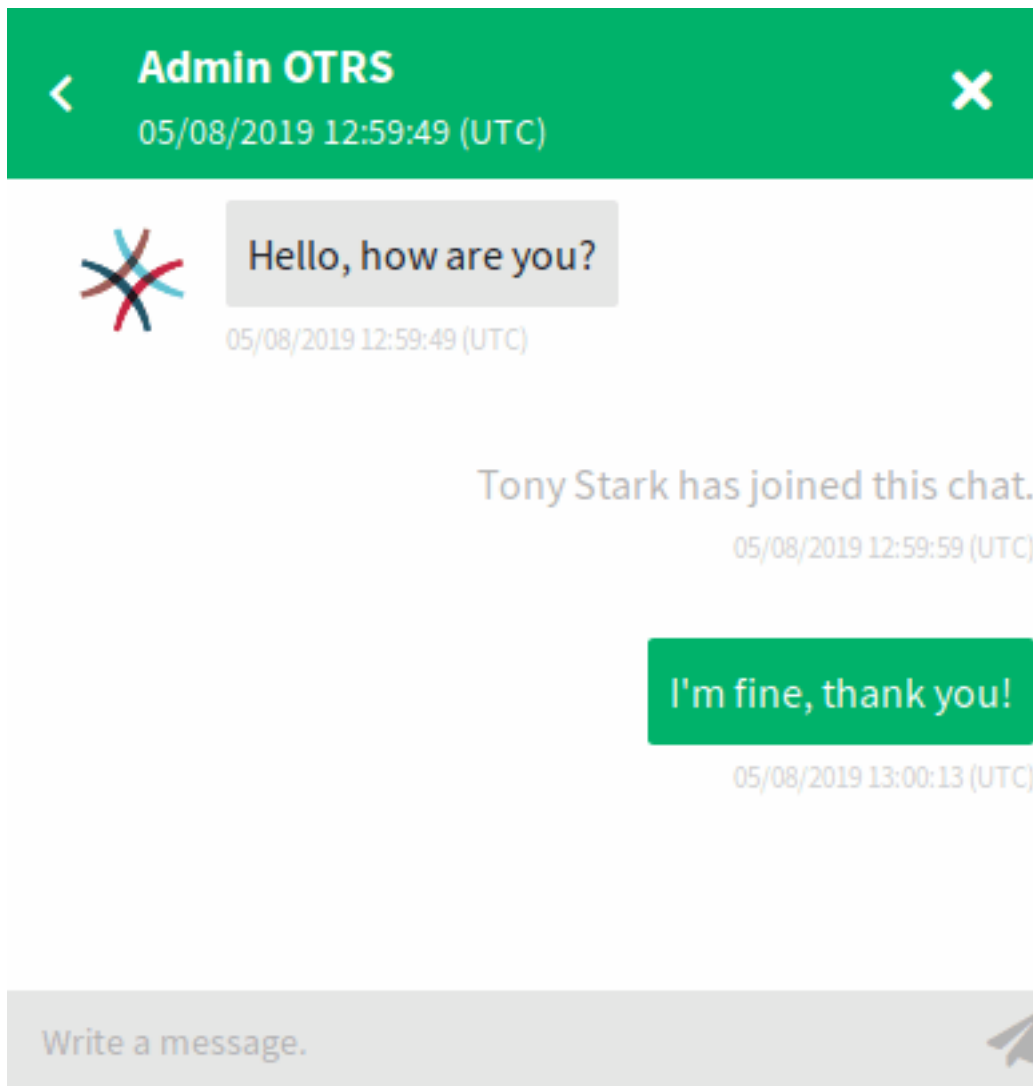
Fig. 8.11: Agent to Customer User Chat
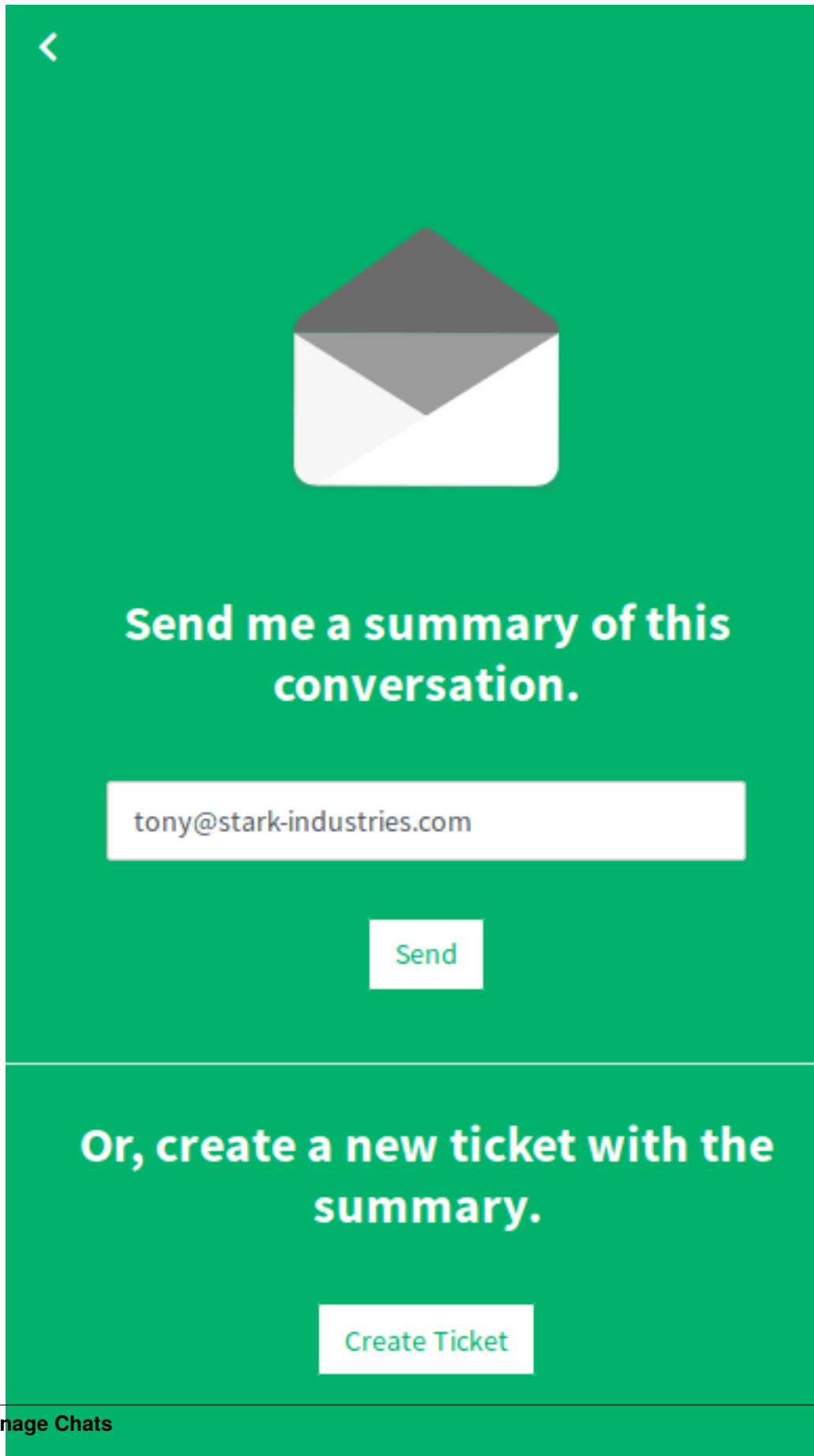
Fig. 8.12: Save the Conversation on External Interface

1. A customer user clicked on the *New conversation* button within the chat window in the bottom right corner of the external interface.
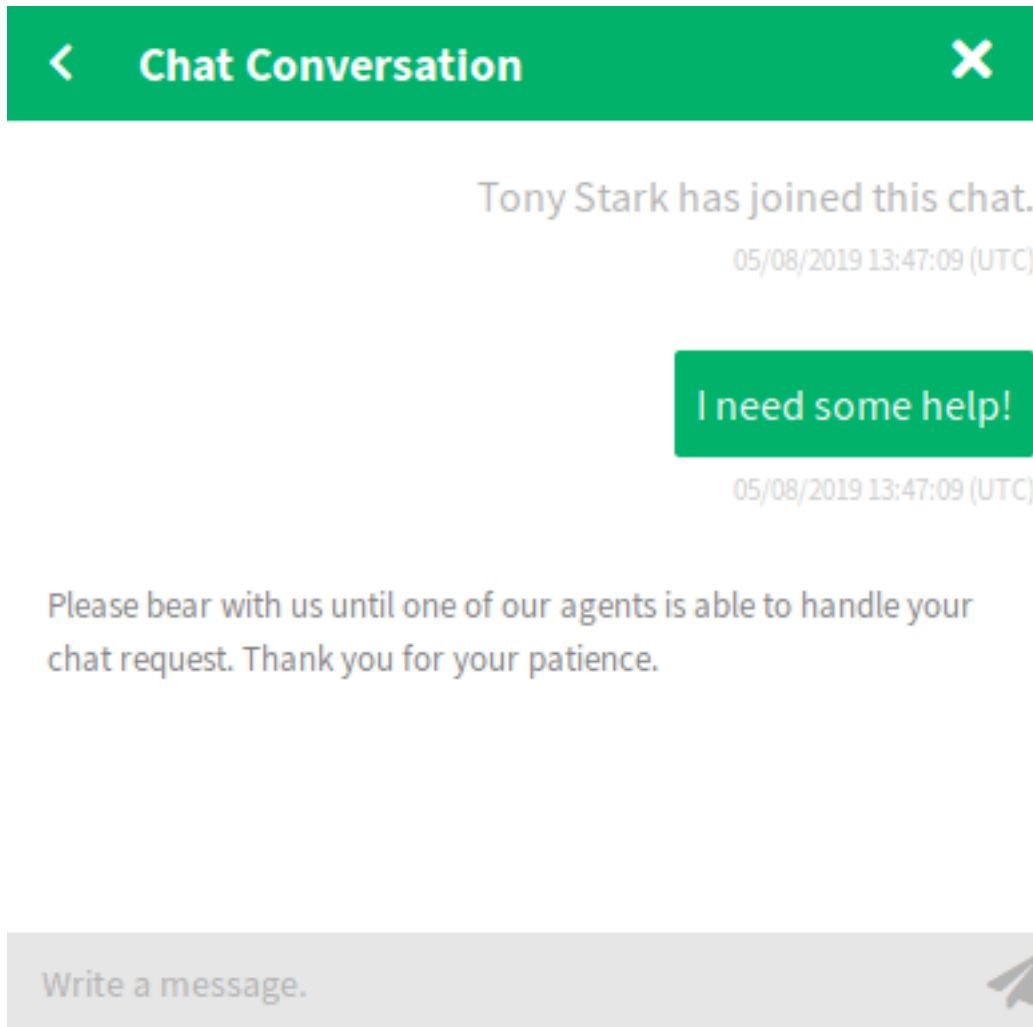
Fig. 8.13: Start Chat Window

2. A browser notification is displayed to inform the agent. Go to the chat management screen, and open the general chat request with the *Open chat* link.

3. Accept the chat request.

6. When an agent accepts the chat request, they can chat now.

Public User to Agent

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

The steps are the same as described in *Customer User to Agent* section, but the chat request is displayed in the *General Chat Requests From Public Users* widget.

Fig. 8.14: General Chat Requests From Customers Widget

Fig. 8.15: Chat Preview Dialog

Fig. 8.16: Customer User to Agent Chat
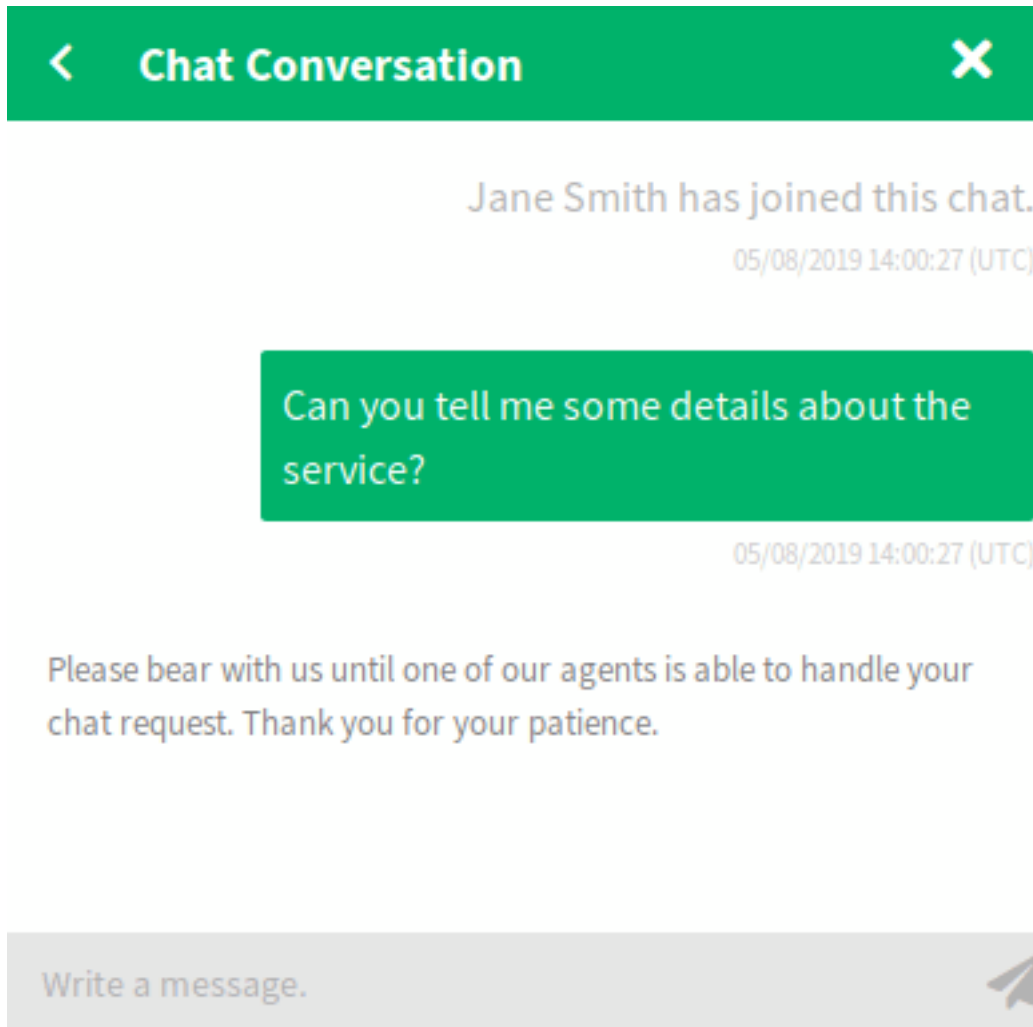
Fig. 8.17: Start Chat Window

Fig. 8.18: General Chat Requests From Public Users Widget

8.1.2 Chat Widget

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

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

Every chat participant has a colored circle icon before his/her name in the chat widget header, which represents the participant availability.

- Green: participant is active (available and online).
- Yellow: participant is away (available, but there was no request sent to the server from this user for some time set in `ChatEngine::AgentOnlineThreshold`).
- Pink: participant is inactive (chat request is not accepted yet or participant left the chat).
- Red: participant is unavailable (set via availability button).
- Black: participant has logged out or session has expired.

The chat widget has some icons in the top right corner.
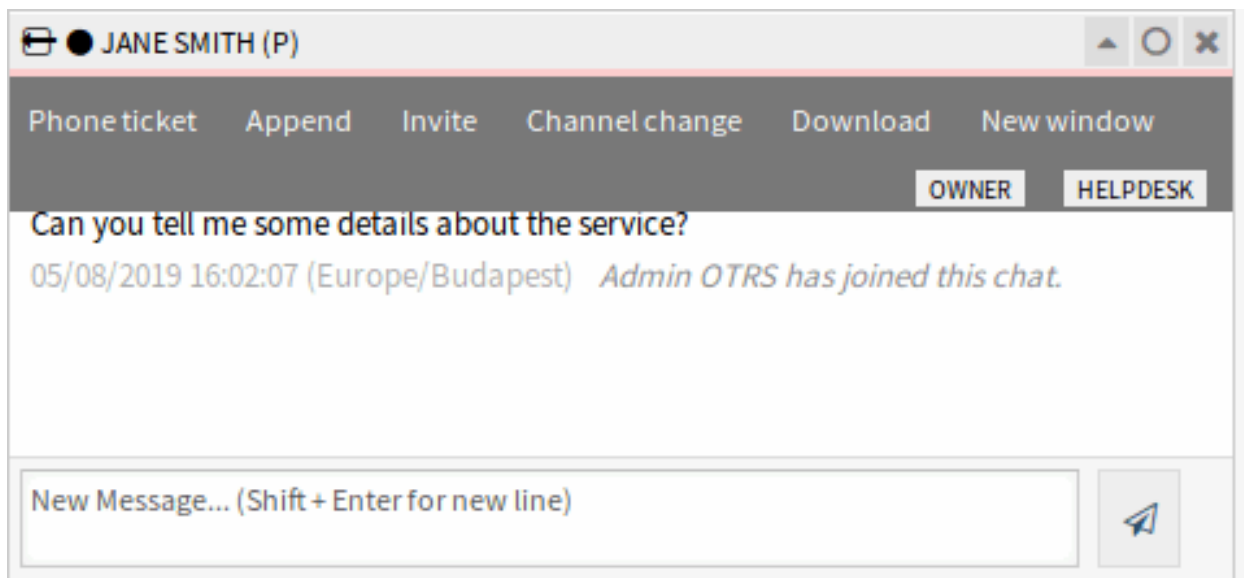
Fig. 8.19: Chat Menu

The first triangle icon expands and collapses the chat menu. The menu has several menu items.

Phone ticket Allows you to create a phone ticket to which the current chat will be appended to as an article. After the ticket has successfully created, the chat will get closed automatically.

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

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

Channel change Using this link, you can change the channel for this chat. For the selection of the target channel the same rules apply as for initially selecting a chat channel.

Download Lets you download the complete history of this chat as PDF.

New window Opens this chat in a separate popup window. You can use this window in the same way as the chat widget and both the widget and the popup can be used at the same time.

Observer When you have been invited to a chat by another agent, you can decide if you want to join the chat as observer or participant depending on your permission level. Once you click the action from your toolbar, a new chat widget will be added to the list of your active chats which is the chat you have been invited to.

If you join the chat as observer, you will only be able to read what others are contributing to the chat and you will be invisible to customer users or public users. Agents will still receive a message that you joined the chat as observer.

As an observer, you have the possibility to become a participant anytime by using the advanced action toolbar in your chat widget depending on your permission level.

Participant If you want to contribute something to the chat you have been invited to, you can join it as a participant. Customer users, public users and agents will receive a message that you have entered the chat. As a participant, you can become an observer anytime by using the advanced action toolbar in your chat widget.

The second circle icon allows the agent to set up a personal monitoring for this chat, which is a three-way switch:

- Empty circle: no monitoring.
- Empty circle with tick icon: only monitor customer user activity.
- Filled circle with tick icon: monitor all actions.

When monitoring a chat, browser notifications will show up each time there is a new action in this chat.

Finally the third close icon makes it possible to close the chat by clicking on the *X*.

8.1.3 Chat Integration

The public chat can be easily integrated into a website with the chat integration configuration and snippet generator.

To configure the chat and generate the code snippet:

1. Click on the *Configure Chat Integration* button in the left sidebar.

2. Customize the texts in the *Configuration* tab.

   ***

   Nota: All changes made in the *Configuration* tab will not be saved. Every time you open this dialog, all fields will be reset to default values.

   ***

3. Copy the code snippet from the *Integration Code* tab and paste it into your website right before the `</body>` element.

4. You can check the result in the *Preview* tab.

   ***

   Nota: The preview uses the real chat module. Other agents have to be available for chatting to preview all features.

   ***
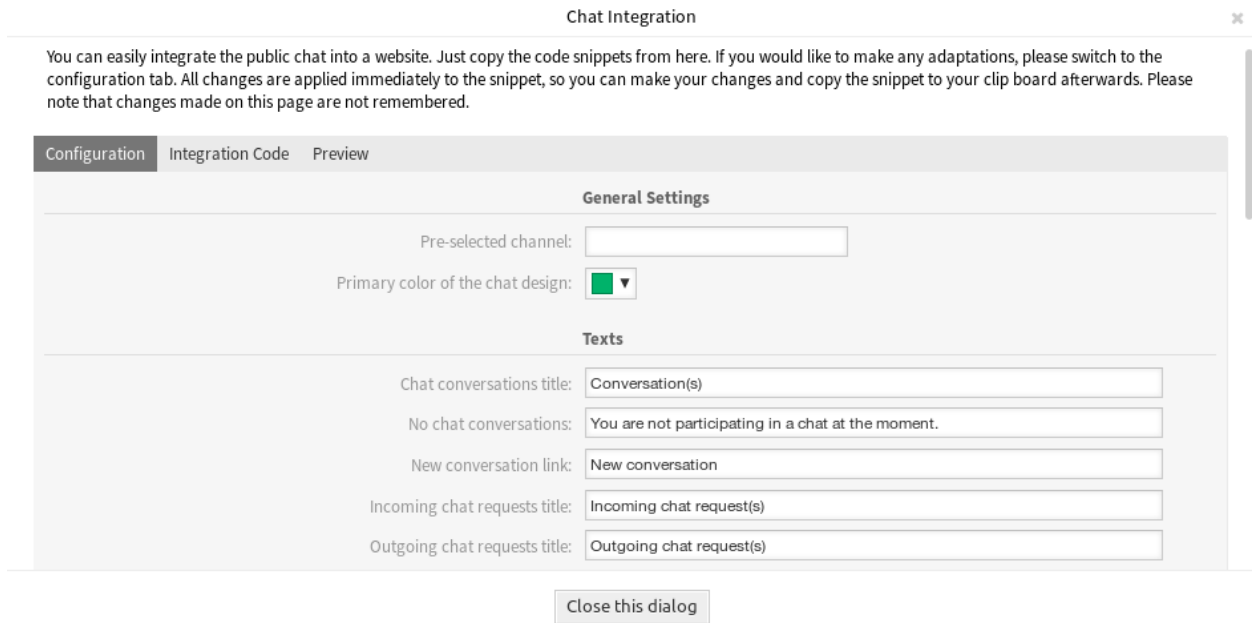
Fig. 8.20: Chat Integration – Configuration

Fig. 8.21: Chat Integration – Integration Code
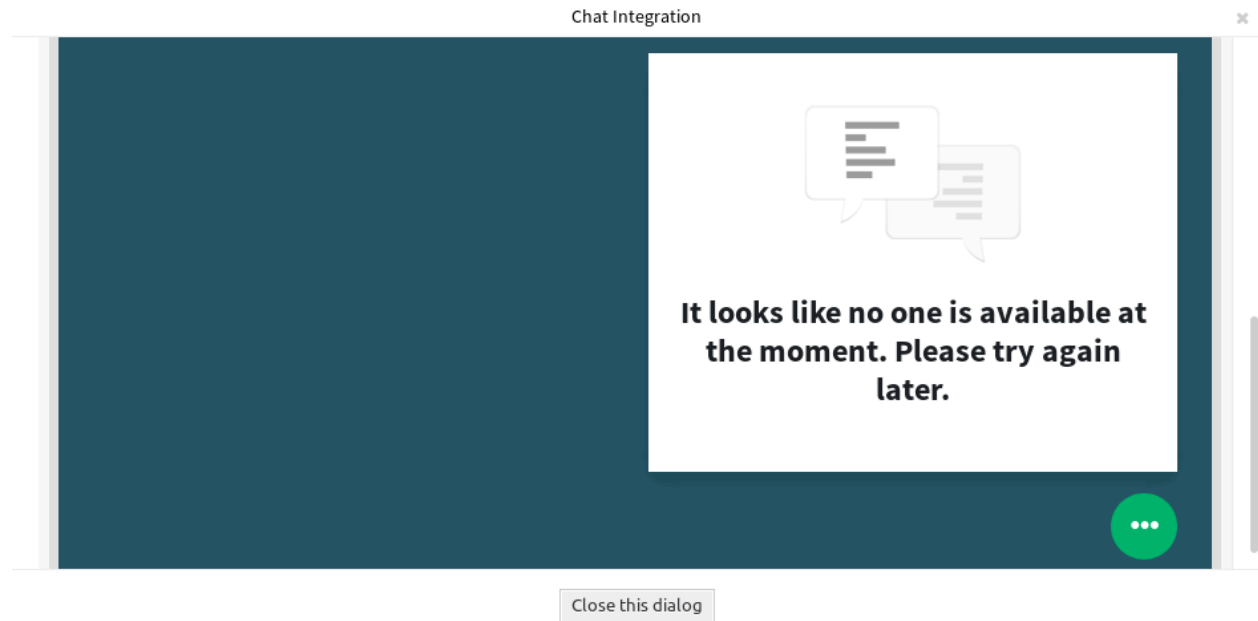
Fig. 8.22: Chat Integration – Preview

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

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

Reports

Reports are automatically generated statistics. In this menu it is possible to define new statistics, and set these statistics as reports, if needed.

9.1 Reports

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

Use this screen to manage reports. A fresh OTOBO installation contains no reports by default. The reports management screen is available in the *Reports* menu item of the *Reports* menu.
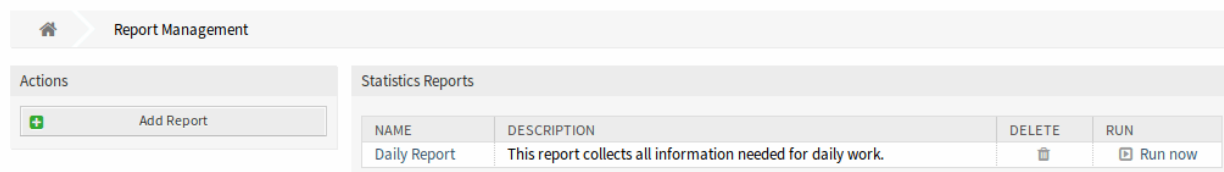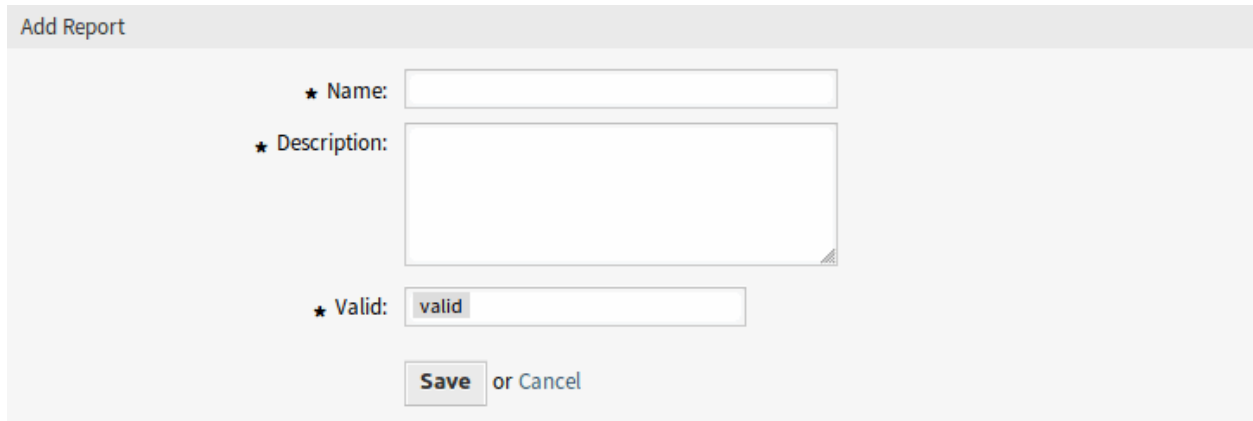
Fig. 9.1: Reports Overview Screen

9.1.1 Manage Reports

To create a new report:

1. Click on the *Add Report* button in the left sidebar.

2. Fill in the required fields.

3. Click on the *Save* button.

4. You will be redirected to *Edit Report* screen to edit the report details.

Fig. 9.2: Add Report Screen

To edit a report:

1. Click on a report in the list of reports or you are already redirected here from *Add Report* screen.

2. Modify the fields and the report details.

3. Click on the *Save* or *Save and finish* button.

To delete a report:

1. Click on the trash icon in the list of reports.

2. Click on the *OK* button in the confirmation screen.

To run a report immediately:

1. Click on the *Run now* link in the list of reports.

2. Click on the *Run now* button in the new screen.

9.1.2 General Report Settings

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

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

Description Add additional information to this resource. It is recommended to always fill this field as a description of the resource with a full sentence for better clarity, because the comment will be also displayed in the overview table.

Validity * 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.

9.1.3 Automatic Generation Settings

Automatic generation times (cron) Specify when the report should be automatically generated in cron format.

Ver também:

Settings

General settings

★ Name: Daily Report

★ Description: This report collects all
information needed for daily work.

★ Valid: valid

Automatic generation settings

Automatic generation times (cron):

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

Times are in the system timezone.

Automatic generation language: English (United States)

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

Email subject:

Specify the subject for the automatically generated email.

Email body:

Specify the text for the automatically generated email.

Email recipients:

Specify recipient email addresses (comma separated).

Output settings

Headline:

Title:

Caption for preamble:

Preamble:

Caption for epilogue:

Epilogue:

Add statistic to report:
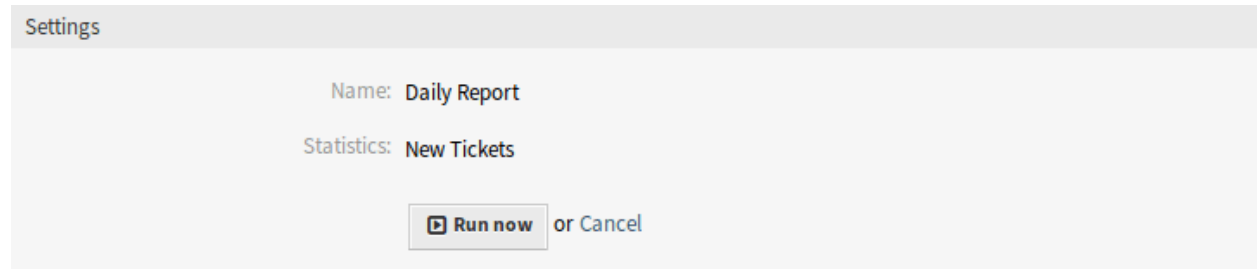
Fig. 9.4: View Report Screen

For more information see the Cron article on Wikipedia.

Nota: Times are in the system timezone.

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

Email subject Specify the subject for the automatically generated email.

Email body Specify the text for the automatically generated email.

Email recipients Specify recipient email addresses (comma separated).

9.1.4 Output settings

Headline This text will be used as headline text of the report.

Title The title of the report.

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

Preamble The preamble text of the report.

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

Epilogue The epilogue text of the report.

9.1.5 Statistics

Add statistic to report Select one or more *Statistics* to be added to the report. Each added statistics have an own overview and settings screen.

After all information is collected and set, click on the *Save* or *Save and finish* button to save the report.

9.2 Statistics

Use this screen to manage statistics. A fresh OTOBO installation already contains some statistics by default. The statistics management screen is available in the *Statistics* menu item of the *Reports* menu.
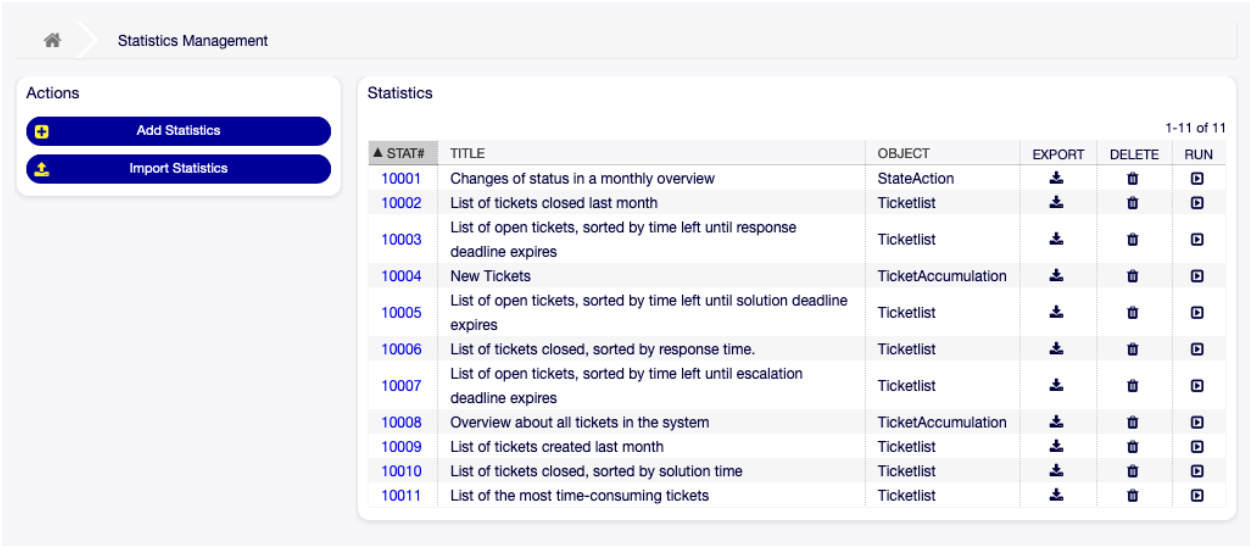
Fig. 9.5: Statistics Overview Screen
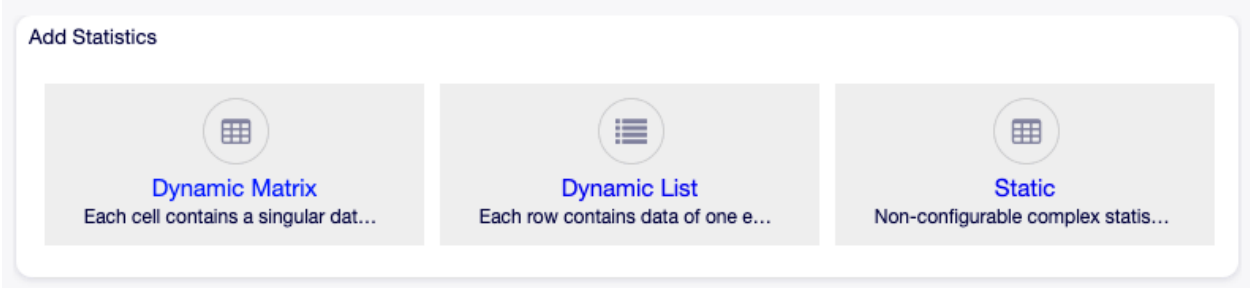
Fig. 9.6: Add Statistics Screen

9.2.1 Manage Statistics

Three type of statistics are available in OTOBO.

Dynamic Matrix Each cell contains a singular data point.

Dynamic List Each row contains data of one entity.

Static Non-configurable complex statistics.

To create new statistics:

1. Click on the *Add Statistics* button in the left sidebar.

2. Select the type for the new statistics.

3. Fill in the required fields.

4. Click on the *Save* button.

Fig. 9.7: Add General Specification Section

To edit statistics:

1. Click on a statistics number in the list of statistics.

2. Modify the fields and the statistics details.

3. Click on the *Save* or *Save and finish* button.

To import statistics:

1. Click on the *Import Statistics* button in the left sidebar.

Fig. 9.8: Edit General Specification Section

2. Click on the *Browse…* button and select a previously exported `.xml` file.

3. Click on the *Import* button.

4. Modify the fields and the statistics details.

5. Click on the *Save* or *Save and finish* button.

Import Statistics Configuration

File: Durchsuchen…   Keine Datei ausgewählt.

Import or Cancel

Fig. 9.9: Import Statistics Configuration Screen

To export statistics:

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

2. Choose a location in your computer to save the `.xml` file.

To delete statistics:

1. Click on the trash icon in the list of statistics.

2. Click on the *OK* button in the confirmation screen.

To run statistics:

1. Click on the play icon in the list of statistics.

2. Review the statistics details.

3. Click on the *Run now* button.

To preview statistics:

1. Go the the edit screen of a statistics.

2. See the preview.

3. Change the settings to view different type of graphs.

4. Change the values of *X-axis*, *Y-axis* and *Filter* with the respective buttons.

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

9.2.2 General Statistics Specification

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

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

Description Add additional information to this resource. It is recommended to always fill this field as a description of the resource with a full sentence for better clarity, because the comment will be also displayed in the overview table.

Fig. 9.10: View Statistics Screen

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

Result formats * You can select, in which format should be able to see the statistics.

Time Zone * The selected time periods in the statistics are time zone neutral.

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

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

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

Show as dashboard widget Provide the statistics as a widget that agents can activate in their dashboard.

Nota: Enabling the dashboard widget will activate caching for this statistics in the dashboard.

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

9.2.3 Ticket Attributes for Statistics

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

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

Ticket# The ticket number.

Fig. 9.11: Statistics Preview Widget

Age The relative age since ticket creation and now.

Title The title of the ticket.

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

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

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

Queue The queue in which the ticket is located.

State The state of the ticket.

Priority The priority of the ticket.

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

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

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

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

Type The type of the ticket.

Agent/Owner The owner agent of the ticket.

Responsible The responsible agent of the ticket.

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

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

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

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

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

FirstResponse The timestamp of first response.

FirstResponseInMin The time in minutes from ticket creation to first response (based on working time).

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

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

FirstResponseTimeEscalation Defines, whether the ticket has escalated or not.

FirstResponseTimeNotification Defines, whether the defined escalation notification time is reached or not.

FirstResponseTimeDestinationTime The escalation time as Unix timestamp.

FirstResponseTimeDestinationDate The absolute date of a first response time escalation.

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

UpdateTimeNotification Defines, whether the defined escalation notification time is reached or not.

UpdateTimeDestinationTime The update time escalation as Unix timestamp.

UpdateTimeDestinationDate The absolute date of an update time escalation.

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

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

SolutionTime The total time in seconds until a solution time escalation.

SolutionInMin The total time in minutes until a solution time escalation.

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

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

SolutionTimeEscalation Defines, whether the ticket has escalated or not.

SolutionTimeNotification Defines, whether the defined escalation notification time is reached or not.

SolutionTimeDestinationTime The solution time escalation as Unix timestamp.

SolutionTimeDestinationDate The absolute date of a solution time escalation.

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

Lock The lock state of the ticket.

StateType State type of the ticket.

UntilTime Total seconds till pending.

UnlockTimeout Time until the ticket is automatically unlocked.

EscalationResponseTime Unix timestamp of response time escalation.

EscalationSolutionTime Unix timestamp of solution time escalation.

EscalationUpdateTime Unix timestamp of update time escalation.

RealTillTimeNotUsed Unix timestamp of pending time.

Number of Articles The number of articles in the ticket.

Process The name of the process in which a process ticket is involved.

Activity The name of the activity in the process.

Activity Status The status of the activity in the process.

DynamicField_NameX The name of the dynamic fields added to the system. The list of dynamic fields is different in each system.

Admin

This menu item opens the administrator interface, which is described very detailed in the Administration Manual.

Nota: This menu item is only available for agents who have administrator privileges.
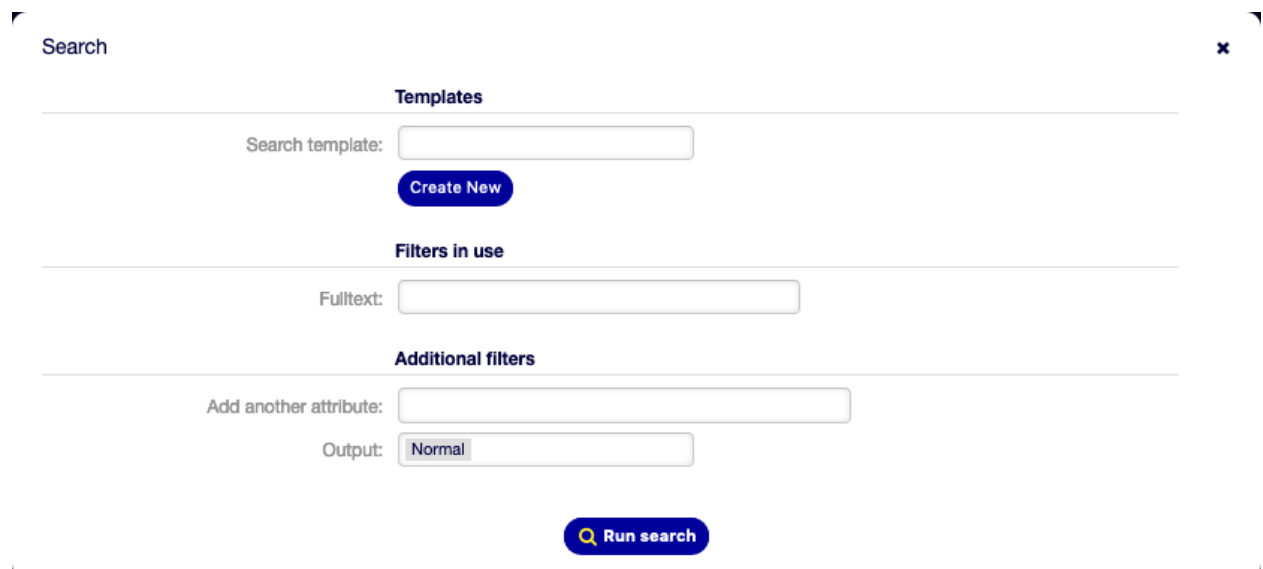
Search

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

11.1 Search

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

Fig. 11.1: Search Dialog

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

Search Results:

			TICKET#	▼AGE	SENDER	TITLE	STATE	LOCK	QUEUE	OWNER	CUSTOMER ID
☐	▬	☆	2020120449000029	7 d 3 h	Wyle Coyote	Computer makes noise	open	unlock	Raw	Super Admin	acme.co
☐	▬	☆	2020120449000011	7 d 7 h	Wyle Coyote	Computer doesn't start	open	lock	Raw	Super Admin	acme.co

Fig. 11.2: Search Results Screen

This screen lists all objects that matches the search term. The objects are grouped by type.

To find the desired object:

1. Select a type in the header of the widget.
2. Use the filter in the right sidebar to narrow the result.

There is an option *All* to see all type of object.

11.1.1 Search Parameters

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

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

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

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

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

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

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

Ver também:

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

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

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

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

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

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

Ranges The query string can contain ranges for date, numeric or string fields. Inclusive ranges are specified with square brackets `[min TO max]` and exclusive ranges with curly brackets `{min TO max}`.

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

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

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

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

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

- `fox` must be present.

- `news` must not be present.

- `quick` and `brown` are optional.

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

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

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

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

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

Ver também:

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

Documentation History

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

2. 2020 - OTOBO User Tutorial - Rother OSS GmbH (https://otobo.de)

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