# (Τ<sub>U</sub>B)

# **OTOBO** User Manual

Release 11.0

Rother OSS GmbH

Sep 23, 2024

## Contents

1	Intro	duction		3
	1.1	0	o Agent Interface	3
	1.2	Login t	o Customer Interface	3
2	Ager	nt		9
	2.1		oard	9
		2.1.1	Dashboard	9
	2.2	Person	al Menu	21
		2.2.1		21
		2.2.2		22
		2.2.3		29
	2.3	Custon		30
		2.3.1		30
		2.3.2		35
		2.3.3		39
		2.3.4		44
	2.4			46
	2.1	2.4.1		46
		2.4.2		51
		2.4.3	5	51
		2.4.4		51
	2.5			55
	2.0	2.5.1		55
		2.5.2	$\sim$	50
		2.5.3		65
		2.5.4		68
		2.5.5		72
		2.5.6		, <u>2</u> 75
		2.5.7		77
		2.5.8		,, 77
		2.5.9		,, 30
	2.6	FAQ		)0 00
	2.0	2.6.1		)0 )0
		2.6.2		01 01
		2.6.Z		01 04
		2.6.5 2.6.4	Journal	
		2.0.7		55

		2.6.5 Category Management
		2.6.6 Search
		2.6.7 FAQ Zoom
	2.7	Chat
		2.7.1 Manage Chats
	2.8	Reports
		2.8.1 Reports
		2.8.2 Statistics
	2.9	Admin
	2.10	Search
		2.10.1 Search
	2.11	Accessibility
3		omer user 143
	3.1	Avatar actions
		3.1.1 Personal Preferences
		3.1.2 Logout
	3.2	Accessibility

147

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# CHAPTER 1

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.

**Note:** 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.

## 1.2 Login to Customer Interface

The customer interface is available at the following location.

**Note:** You have to replace <OTOBO\_HOST> with your domain.

https://<OTOBO\_HOST>/otobo/customer.pl

(	く T し B い	
	Logout successful.	
	Username	
	Password	
	Login	
	Lost your password?	
	Powered by Rother OSS	

Fig. 1.1: Agent Login Screen

ст U В Г	
Username Request New Password	
← Back to login	
Powered by Rother OSS	

Fig. 1.2: Request New Password Screen

	ets					Settings
My locked ticket	ts (0)   Tickets in M	ly Queues (0)   Ticki	ets in My Services (0)   All f	tickets (0)		7 Day Stats
none	TICK	=T#	AGE	TITLE		Created Closed
scalated Ticke	ate					
		Queues (0)   Ticket	s in My Services (0)   All ti	ckets (0)		
	TICK	=T#	AGE	TITLE		
none						
New Tickets						
ly locked tickets	(0)   Tickets in My	Queues (0)   Ticket	s in My Services (0)   All ti	ckets (1)		0 Thu Fri Sat Sun Mon Tue W
	TICKET#		▼AGE	TITLE		
= *	201507151012	23456	57 d 22 h	Welcome to OTOBO!		Upcoming Events
Open Tickets						none
My locked tickets	(0)   Tickets in My	Queues (0)   Ticket	s in My Services (0)   All ti	ckets (0)		Latest updated FAQ articles
	TICKE	T#	▼AGE	TITLE		
none						Latest created FAQ articles
Ficket Queue C	verview					
	NEW	OPEN	PENDING REMINDE	R	TOTAL	OTOBO News
QUEUE	1	0	0		1	OTOBO Launch
QUEUE Raw	1	0	0			Chatbot, Testing, neue Features
						Rother OSS veröffentlicht OTOBO 10 beta
Raw						
Raw						Beta-Launch am 30.01.2020

Fig. 1.3: Agent Interface

You need a customer account to be able to use OTOBO. If you have no account yet, please contact your administrator or signup (if enabled by the administrator).

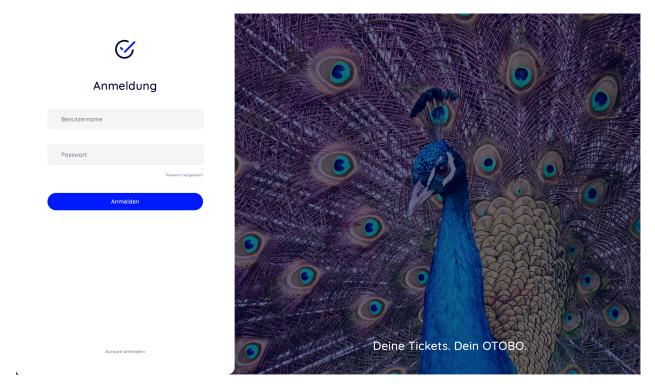


Fig. 1.4: Customer Login Screen

If you forget your password, click on the Lost your password? link, and follow the instructions there. After a successful login, the customer dashboard will be displayed.

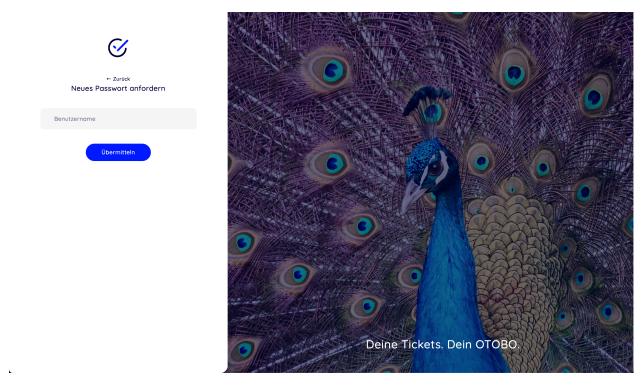


Fig. 1.5: Request New Password Screen

©	Welcome User, to your OTOE This service portal is available to you all day every day.	3O.	् Ticket Search	
::	Richtext Infokachel Diese Infokachel unterstützt Richtext und wird direkt über di Unterschiedliche Bereiche Können eigene Abschnitte innerha Außerdem gibt es ein zusötzliches Laufband für aktuelle Mel wird.	lb der Kachel pflegen.	lssue a ticket	+
A	That's new in OTOBO 11.0 Highlights: Processes in the service portal, S, modern authentication with OpenID Connect, enhanced S/MIME functionalitu Explore >	Your last tickets Welcome! You have no tickets yet. Please click here, to create a new	one.	



# CHAPTER 2

Agent

In this section you can find information if you are working as an agent in OTOBO.

## 2.1 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.

### 2.1.1 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.

leminder Ticke		- O	the in the Operation (0) is the	Solution (0)		<ul> <li>Settings</li> </ul>
Wy locked ticket	TICKETS IN M		ets in My Services (0)   All f	TITLE		7 Day Stats
none	Hora		, loc			Created Closed
scalated Ticke		Queues (0)   Ticket	ts in My Services (0)   All ti	ckets (0)		
	TICKE	ET#	AGE	TITLE		
none						
lew Tickets	(0) i Tickets in My	Queues (0)   Ticket	ts in My Services (0)   All ti	cleate (1)		0 Thu Fri Sat Sun Mon Tue W
iny looked liokets	TICKET#	denena (0)   Honer	▼AGE	TITLE		
- +		23456	57 d 22 h	Welcome to OTOBO!		Upcoming Events
pen Tickets						none
ly locked tickets	s (0)   Tickets in My	Queues (0)   Ticket	ts in My Services (0)   All ti	ckets (0)		Latest updated FAQ articles
2020	TICKET	Τ#	▼AGE	TITLE		
none						Latest created FAQ articles
ïcket Queue C	Verview					
	NEW	OPEN	PENDING REMINDE	R	TOTAL	OTOBO News
QUEUE	1	0	0		1	OTOBO Launch
			•			
QUEUE Raw TOTAL	1	0	0			Chatbot, Testing, neue Features
Raw	1	0	U			Rother OSS veröffentlicht OTOBO 10 beta Beta-Launch am 30.01,2020





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.

#### See also:

Icons and search boxes can be activated in settings under Frontend ightarrow Agent ightarrow Toolbar.

The last icon is the chat availability status.

#### See also:

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.

**Note:** 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.

My locked ticket	s (0)   My responsi	ibilities (0)   Tickets in M	ly Queues (0)   Tickets	in My Services (0)   All tickets (0)		7 Day St	ats				
	TICKE	ET#	AGE	TITLE							
none						1		Cr	eated	Clo	sed
Escalated Ticke	ets										
My locked tickets	(0)   My responsibi	ilities (0)   Tickets in My	Queues (0)   Tickets ir	n My Services (0)   All tickets (0)							
	TIČKE	T#	AGE	TITLE		0				•	
none											
New Tickets											
My locked tickets		ilities (0)   Tickets in My		n My Services (0)   All tickets (4)		-1 Fri	Sat S	un N	lon '	Tue W	ed T
	TICKET#		▼AGE	TITLE							
			8 d 23 h	Test via Email		Upcomin	g Events	6			
	202011244900		9 d 1 h	Test via Email			•				
<b>– †</b>			9 d 2 h	Willkommen		none					
	201507151012	:0400	72 d 21 h	Welcome to OTOBO!							
						Latest up	odated F	AQ ar	ticles		
My locked tickets	TICKET#	▼AGE	TITLE	n My Services (0)   All tickets (3)		How to Misc - 1 Compu	create a 11/18/202 ter is dea	suppo 20 15: d	ort bur 51 (Eu	idle rope/Be	
My locked tickets	TICKET# 202011254900	<b>▼AGE</b> 00027 7 d 18 h	TITLE Test Internal Helpd	esk (Dynamic Field) Network Operati	ons	How to Misc - 1 Compu	create a 11/18/202	suppo 20 15: d	ort bur 51 (Eu	idle rope/Be	
My locked tickets	TICKET# 202011254900 202011254900	▼AGE           00027         7 d 18 h           00018         7 d 21 h	TITLE Test Internal Helpde Test Internal Helpde	esk (Dynamic Field) Network Operationski (Dynamic Field)	ons	How to Misc - <sup>-</sup> Compu Misc - <sup>-</sup>	create a 11/18/202 ter is dea 11/18/202	suppo 20 15: d 20 15:	ort bur 51 (Eu 30 (Eu	idle rope/Be	
My locked tickets	TICKET# 202011254900	▼AGE           00027         7 d 18 h           00018         7 d 21 h	TITLE Test Internal Helpd	esk (Dynamic Field) Network Operationski (Dynamic Field)	ons	How to Misc - 1 Compu	create a 11/18/202 ter is dea 11/18/202	suppo 20 15: d 20 15:	ort bur 51 (Eu 30 (Eu	idle rope/Be	
My locked tickets	TICKET# 202011254900 202011254900 202011194900	▼AGE           00027         7 d 18 h           00018         7 d 21 h	TITLE Test Internal Helpde Test Internal Helpde	esk (Dynamic Field) Network Operationski (Dynamic Field)	ons	How to Misc - * Compu Misc - * Latest cr How to	create a 11/18/202 ter is dea 11/18/202	suppo 20 15: d 20 15: AQ art suppo	ort bur 51 (Eu 30 (Eu icles ort bur	ndle rope/Be rope/Be	erlin)
My locked tickets	TICKET# 202011254900 202011254900 202011194900	▼AGE           00027         7 d 18 h           00018         7 d 21 h	TITLE Test Internal Helpde Test Internal Helpde	esk (Dynamic Field) Network Operati esk (Dynamic Field) o his mail account		How to Misc - * Compu Misc - * Latest cr How to Misc - *	create a 11/18/202 ter is dea 11/18/202 reated FA create a	suppo 20 15: d 20 15: AQ art suppo 20 15:	ort bur 51 (Eu 30 (Eu icles ort bur	ndle rope/Be rope/Be	erlin)
Ticket Queue O	TICKET# 202011254900 202011254900 202011194900	▼AGE           00027         7 d 18 h           00018         7 d 21 h           00011         14 d 0 h	TITLE Test Internal Helpdo Test Internal Helpdo User cannot login t	esk (Dynamic Field) Network Operati esk (Dynamic Field) o his mail account		How to Misc - * Compu Misc - * Latest cr How to Misc - * Compu	create a 11/18/202 ter is dea 11/18/202 eated FA create a 11/18/202	suppo 20 15: d 20 15: AQ art suppo 20 15: d	ort bur 51 (Eu 30 (Eu icles ort bur 51 (Eu	ndle rope/Be rope/Be	erlin) erlin)
My locked tickets	TICKET# 202011254900 202011254900 202011194900 verview NEW	VAGE           00027         7 d 18 h           00018         7 d 21 h           00011         14 d 0 h	TITLE Test Internal Helpde Test Internal Helpde User cannot login t	esk (Dynamic Field) Network Operatie esk (Dynamic Field) o his mail account		How to Misc - * Compu Misc - * Latest cr How to Misc - * Compu	create a 11/18/202 ter is dea 11/18/202 eeated FA create a 11/18/202 ter is dea	suppo 20 15: d 20 15: AQ art suppo 20 15: d	ort bur 51 (Eu 30 (Eu icles ort bur 51 (Eu	ndle rope/Be rope/Be	erlin) erlin)
My locked tickets	TICKET#           202011254900           202011254900           2020111254900           202011194900	VAGE           00027         7 d 18 h           00018         7 d 21 h           00011         14 d 0 h	TITLE Test Internal Helpde Test Internal Helpde User cannot login t PENDING REMINDE 0	esk (Dynamic Field) Network Operatiesk (Dynamic Field) o his mail account		How to Misc - * Compu Misc - * Latest cr How to Misc - * Compu	create a 11/18/202 ter is dea 11/18/202 eeated FA create a 11/18/202 ter is dea 11/18/202	suppo 20 15: d 20 15: AQ art suppo 20 15: d	ort bur 51 (Eu 30 (Eu icles ort bur 51 (Eu	ndle rope/Be rope/Be	erlin) erlin)
My locked tickets	TICKET#           202011254900           202011254900           2020111254900           202011194900	VAGE           00027         7 d 18 h           00018         7 d 21 h           00011         14 d 0 h	TITLE Test Internal Helpde Test Internal Helpde User cannot login t PENDING REMINDE 0 0	esk (Dynamic Field) Network Operatiesk (Dynamic Field) o his mail account		How to Misc Compu Misc Latest or How to Misc - Compu Misc	create a 11/18/202 ter is dea 11/18/202 eeated FA create a 11/18/202 ter is dea 11/18/202	suppo 20 15: d 20 15: AQ art suppo 20 15: d	ort bur 51 (Eu 30 (Eu icles ort bur 51 (Eu	ndle rope/Be rope/Be	erlin) erlin)
My locked tickets	TICKET#           202011254900           202011254900           2020111254900           202011194900	VAGE           00027         7 d 18 h           00018         7 d 21 h           00011         14 d 0 h	TITLE Test Internal Helpde Test Internal Helpde User cannot login t PENDING REMINDE 0 0	esk (Dynamic Field) Network Operatiesk (Dynamic Field) o his mail account		How to Misc Compu Misc How to Misc - Compu Misc - OTOBO	create a 11/18/202 ter is dea 11/18/202 eated FA create a 11/18/202 ter is dea 11/18/202 News	suppo 20 15: d 20 15: AQ art suppo 20 15: d 20 15:	ort bur 51 (Eu 30 (Eu icles ort bur 51 (Eu 30 (Eu	ndle rope/Be ndle rope/Be	erlin) erlin)
My locked tickets	TICKET#           202011254900           202011254900           2020111254900           202011194900	VAGE           00027         7 d 18 h           00018         7 d 21 h           00011         14 d 0 h	TITLE Test Internal Helpde Test Internal Helpde User cannot login t PENDING REMINDE 0 0	esk (Dynamic Field) Network Operatiesk (Dynamic Field) o his mail account		How to Misc Compu Latest cr How to Misc Compu Misc - Compu Misc - OTOBO	create a 11/18/202 ter is dea 11/18/202 eated FA create a 11/18/202 ter is dea 11/18/202 News ) Launch	suppo 20 15:: d 20 15:: suppo 20 15:: d 20 15:: , neue	ort bur 51 (Eu 30 (Eu icles ort bur 51 (Eu 30 (Eu	ndle rope/Be ndle rope/Be rope/Be	erlin) erlin)
My locked tickets	TICKET#           202011254900           202011254900           2020111254900           202011194900	VAGE           00027         7 d 18 h           00018         7 d 21 h           00011         14 d 0 h	TITLE Test Internal Helpde Test Internal Helpde User cannot login t PENDING REMINDE 0 0	esk (Dynamic Field) Network Operatiesk (Dynamic Field) o his mail account		How to Misc Compu Misc Latest cr How to Misc Compu Misc - Compu Misc - Compu Misc - Compu Misc -	create a 11/18/202 ter is dea 11/18/202 eated FA create a 11/18/202 ter is dea 11/18/202 ter is dea 11/18/202 News D Launch t, Testing	suppo 20 15:: d 20 15:: suppo 20 15:: d 20 15:: , neue	ort bur 51 (Eu 30 (Eu icles ort bur 51 (Eu 30 (Eu 30 (Eu Featu	idle rope/Ba idle rope/Ba rope/Ba ures TOBO 1	erlin) erlin)

Fig. 2.3: Dashboard Widgets

#### See also:

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.
- 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.

New Tickets		
Shown Tickets:	10	
Shown Columns:	AVAILABLE COLUMNS	VISIBLE COLUMNS (ORDER BY DRAG & DROP)
	Filter available fields	1. TicketNumber
	Filler available fields	2. Age
	Changed	3. Title
	Created	
	Customer Name	
	Customer ID	
	Customer User Name	
	Customer User ID	
	Eirot Deepense Time	
	Save Changes	s or Cancel

Fig. 2.4: Widget Settings



#### Dashboard Content Widgets

**Note:** 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.

Reminder Tickets									
My locked ticket	s (0) Tic	kets in My Queues (0)	All tickets (0)						
		TICKET#		AGE	TITLE				
none									

Fig. 2.5: 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.

Escalated Tickets				
My locked tickets (0)	Tickets in My Queues (0)	All tickets (0)		
	TICKET#		AGE	TITLE
none				

Fig. 2.6: Escalated Tickets Widget

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

New Tickets									
My locked tickets (1) Tickets in My Queues (0) All tickets (1)									
	TICKET#	▼ AGE	TITLE						
	2015071510123456	122 d 22 h	Welcome to OTRS!						

Fig. 2.7: New Tickets Widget

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.

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.

The Events Ticket Calendar widget displays tickets in a calendar, but this widget does not work out-ofthe-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	Туре	Name	Label
Ticket	Date / Time	TicketCalendarStartTime	Calendar Start Time
Ticket	Date / Time	TicketCalendarEndTime	Calendar End Time

2. Navigate to Frontend  $\rightarrow$  Agent  $\rightarrow$  View and select a view to add the dynamic field to.

Open Tickets							
My locked ticke	ts (0)	Ticke	ts in My Queues (0)	All tickets (0)			
			TICKET#		▼ AGE	TITLE	
none							



My locked tickets (0)	My responsit	oilities (0)   Tickets in My	y Queues (0)   Tickets in M	y Services (0)   All tick	cets (0)
TICK	ET#	PROCESS	T ACTIVITY	T ▼AGE	TITLE

Fig. 2.9: Running Process Tickets Widget

cket Queue C	verview			
QUEUE	NEW	OPEN	PENDING REMINDER	TOTAL
Misc	0	3	0	3
Raw	4	0	0	4
TOTAL	4	3	0	

Fig. 2.10: Ticket Queue Overview Widget

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  $\rightarrow$  Free Fields menu item of the Ticket Zoom screen.

- Ticket::Frontend::AgentTicketPhone###DynamicField
  - TicketCreateStartTime  $\rightarrow$  1 Enabled
  - TicketCreateEndTime  $\rightarrow$  1 Enabled
- Ticket::Frontend::AgentTicketEmail###DynamicField
  - <code>TicketCreateStartTime  $\rightarrow$  1 Enabled</code>
  - TicketCreateEndTime  $\rightarrow$  1 Enabled
- Ticket::Frontend::AgentTicketFreeText###DynamicField
  - <code>TicketCreateStartTime  $\rightarrow$  1 Enabled</code>
  - <code>TicketCreateEndTime</code>  $\rightarrow$  1 <code>Enabled</code>
- 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.

#### 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.

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.

The Upcoming Events widget displays entries from the Calendar.

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.

Note: 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.

#### See also:

To change the RSS feed source, see DashboardBackend###0410-RSS setting.

month week	day	Mar 2019				C Coday		
Мо	Tu	We	Th	Fr	Sa	Su		
25	26	27	28	1	2	3		
4	5	6	7	8	9	10		
11	12	13	14	15	16	17		
18	19	20	21	22	23	24		
25	26	27	28	29	30	31		
<b>7a</b> TODOs for the next								
1	2	3	4	5	6	7		

### Fig. 2.11: Events Ticket Calendar Widget

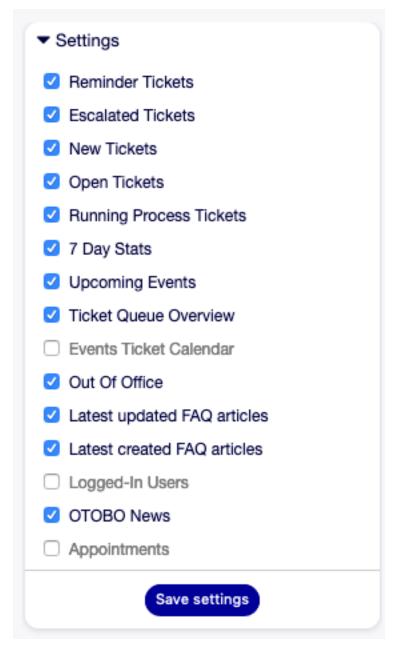


Fig. 2.12: Settings Widget

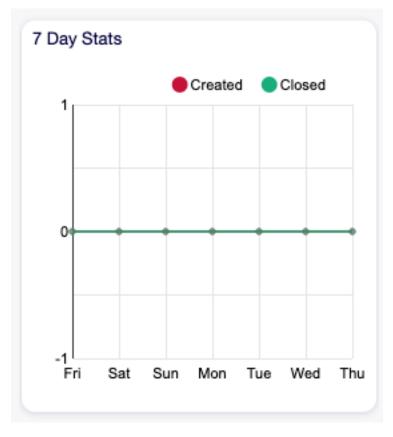


Fig. 2.13: 7 Day Stats Widget

Upcoming Events	
none	

Fig. 2.14: Upcoming Events Widget



Fig. 2.15: Out Of Office Widget

```
Latest updated FAQ articles

How to create a support bundle

Misc - 11/18/2020 15:51 (Europe/Berlin)

Computer is dead

Misc - 11/18/2020 15:30 (Europe/Berlin)
```

Fig. 2.16: Latest Updated FAQ Articles Widget



Fig. 2.17: Latest Created FAQ Articles Widget

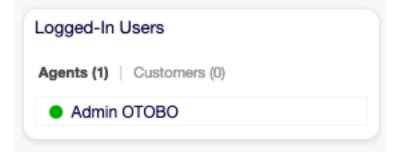


Fig. 2.18: Logged-In Users Widget

## OTOBO News!

OTOBO 10.0.21 OTOBO 10.1.10 OTOBO 10.1.9 OTOBO 10.0.20 OTOBO 11 Beta OTOBO Add-On: Rocket.Chat Integration

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.

New Appointment
(0)   Tomorrow (0)   Soon (0
START TITLE

Fig. 2.20: Appointments Widget

## 2.2 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.

### 2.2.1 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	a found.						

#### Fig. 2.21: 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.

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

#### 2.2.2 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

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.

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

#### **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.

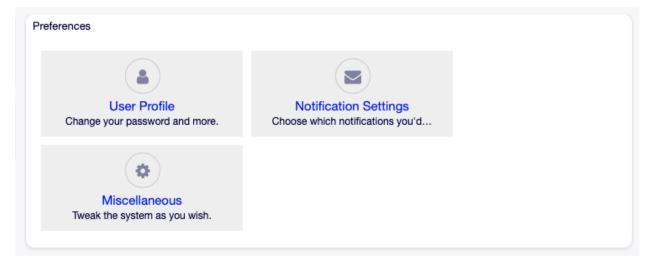


Fig. 2.22: Preferences Modules

Change password		
Current password:	Set a new password by filling in your current password and a new	~
New password:	one.	
Verify password:		

Fig. 2.23: Change Password Widget

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

New password Type your new password here.

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

#### **Google Authenticator**

#### See also:

 $\label{eq:System configuration PreferencesGroups \#\#\#GoogleAuthenticatorSecretKey needs to be activated to use this feature.$ 

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.

Google Authenticator			
Shared Secret:	Generate	Enter your shared secret to enable two factor authentication.	✓

Fig. 2.24: 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.

**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.

#### Avatar

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

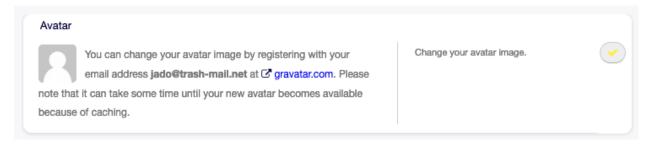


Fig. 2.25: Avatar Widget

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	
English (United States)	Select the main interface

Fig. 2.26: Language Widget

#### 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.

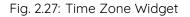
#### See also:

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.

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



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.

Out Of Office Time		
Start:	• On Off 12 •/03 •/ 2020 • ••• 12 •/04 •/ 2020 • •••	If you're going to be out of office, you may wish to let other users know by setting the exact dates of your absence.



Active The function can be turned on or off.

Start The first day of absence.

End The last day of absence.

#### **Notification Settings**

These settings are for customizing personal notifications.

#### 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.

My Queues	
	Your queue selection of your preferred queues. You also get notified about those queues via email if enabled.

#### Fig. 2.29: My Queues Widget

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

#### My Services

#### See also:

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.

My Services	
	Your service selection of your preferred services. You also get notified about those services via email if enabled.

Fig. 2.30: 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.

TIFICATION	-	Choose for which kind of ticket
:ket create notification		changes you want to receive notifications. Please note that
ket follow-up notification (locked)		you can't completely disable
et follow-up notification (unlocked)		notifications marked as
ket lock timeout notification		mandatory.
t queue update notification		
et service update notification		

Fig. 2.31: 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.

Appointment notifications		
NOTIFICATION	2	Choose for which kind of appointment changes you want
Appointment reminder notification		to receive notifications.

Fig. 2.32: Appointment Notifications Widget

The possible methods are Email, Web View or SMS.

#### My Chat Channels

#### See also:

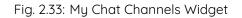
System configuration ChatEngine::Active needs to be activated to use this feature.

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.

My Chat Channels		
	Your selection of your preferred external chat channels. You will be notified about external chat requests in these chat channels.	*



#### Miscellaneous

These settings are for change of visual appearance of OTOBO.

#### Skin

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

Skin	
Default	Select your preferred layout for the software.



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.

Overview Refresh Time	
off	If enabled, the different overviews (Dashboard, LockedView, QueueView) will automatically refresh after the specified time.

Fig. 2.35: Overview Refresh Time Widget

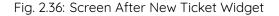
Select a refresh interval from the drop-down list.

**Warning:** 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.

Screen after new ticket	
Create Ticket	Configure which screen should be shown after a new ticket has been created.



Select a screen from the drop-down list.

#### Advanced

In this module can be configured some system configuration options.

Advanced Personal Preferences	
Preferences	
Set up your personal preferences. Save each setting by clicking the checkmark on the right. You can use the navigation tree below to only show settings from certain groups.	P
▼ Navigation	Navigate through the available settings by using the tree in the navigation box on the left side.
► Frontend	

Fig. 2.37: 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.

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.

#### 2.2.3 Logout

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

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

Advance	ed Frontend Agent		
Preferences	Ticket::Frontend::PendingDiffTime		Ċ
Set up your personal preferences. Save each setting by clicking the checkmark on the right. You can use the navigation tree below to only show settings from certain groups.	86401	Time in seconds that gets added to the actual time if setting a pending-state (default: 86400 = 1 day).	~
▼ Navigation	Ticket::Frontend::RedirectAfterCloseDisabled		
<ul> <li>Frontend</li> <li>Agent (2)</li> </ul>	Enabled	Disables the redirection to the last screen overview / dashboard after a ticket is closed.	~

Fig. 2.38: Advanced Preferences - Tree navigation Screen

## 2.3 Customers

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

#### 2.3.1 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.

#### 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:	J

Fig. 2.39: Customer or Customer User Search Dialog

**Note:** 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.

**Note:** 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.

#### See also:

See chapter Dashboard for more detailed explanation of managing widgets.

Customer Users								Settings	
+ Add Customer U	er							(a	
CUSTOMER USER	MER USER ID CUSTOMER USER INFORMATION OPEN CLOSED PHONE TICKET EMAIL TICKET EDIT						EDIT	Company Status	
we	"Wyle Coyote" <we@acme.examp< th=""><th>le.com&gt;</th><th>3</th><th>1</th><th>Create</th><th>Create</th><th>Ø</th><th colspan="2">Escalated tickets: 0 Open tickets: 3</th></we@acme.examp<>	le.com>	3	1	Create	Create	Ø	Escalated tickets: 0 Open tickets: 3	
Reminder Tickets My locked tickets (0)	My responsibilities (0)	Tickets in My (	Queues (0)	Tickets in My	/ Services (0)   All	ickets (0)		Closed tickets: 1 All tickets: 4	
	TICKET#		AG	E	TITL	E		Customer Information	
none									
Escalated Tickets								Customer: Acme Inc. Comment: A great company	
	My responsibilities (0)	Tickets in My Q	ueues (0)   T AG	-	Services (0)   All ti				
My locked tickets (0) none New Tickets			AG	E	TTTL	E			
My locked tickets (0) none New Tickets	TICKET#		AG	E ickets in My S	TTTL	E ckets (0)			
My locked tickets (0) none New Tickets	TICKET#		AG	E ickets in My S	TTTL Services (0)   All ti	E ckets (0)			
My locked tickets (0) none New Tickets My locked tickets (0) none Open Tickets	TICKET#	Tickets in My Q	AG ueues (0)   Ti  ▼AGE	E ickets in My S	TTTL Services (0)   All ti	E ckets (0) LE			
My locked tickets (0) none New Tickets My locked tickets (0) none Open Tickets My locked tickets (2)	TICKET# My responsibilities (0) TICKET# My responsibilities (3)	Tickets in My Q	AG ueues (0)   Ti ▼AGE ueues (3)   Ti	E ickets in My S	TTTL Services (0)   All ti	E ckets (0) LE			
My locked tickets (0) none New Tickets My locked tickets (0) none Open Tickets My locked tickets (2)	TICKET# My responsibilities (0) TICKET# My responsibilities (3) ICKET#	Tickets in My Q Tickets in My Q ▼AGE	AG     Ueues (0)   Ti     ▼AGE     Ueues (3)   Ti TITLE	E ckets in My S ckets in My S	TTTL Services (0)   All ti Services (0)   All ti	E ckets (0) LE ckets (3)			
My lookad tiokats (0) none New Tickets My lookad tickets (0) none Open Tickets My lookad tickets (2)	TICKET# My responsibilities (0) TICKET# My responsibilities (3)	Tickets in My Q Tickets in My Q VAGE 7 d 20 h	AG ueues (0)   Ti ▼AGE ueues (3)   Ti TITLE Test Internal	E ckets in My S ckets in My S Helpdesk (E	TTTL Services (0)   All ti	E ckets (0) LE ckets (3)			

Fig. 2.40: 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.
- 2. Fill in the required fields.
- 3. Click on the Save button.

To edit a customer user:

ustomer Users						
+ Add Customer User						
CUSTOMER USER ID	CUSTOMER USER INFORMATION	OPEN	CLOSED	PHONE TICKET	EMAIL TICKET	EDIT
we	"Wyle Coyote" <we@acme.example.com></we@acme.example.com>	3	1	Create	Create	Ø

#### Fig. 2.41: Customer Users Widget

- 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.

Reminder Tickets								
My locked tickets	(0) Ticke	ts in My Queues (0)	All tickets (0)					
		TICKET#		AGE	TITLE			
none								

#### Fig. 2.42: 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.

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

Escalated Tickets				
My locked tickets (0)	Tickets in My Queues (0)	All tickets (0)		
	TICKET#		AGE	TITLE
none				

## Fig. 2.43: Escalated Tickets Widget

New Tickets				
My locked tickets (	1) Tickets in My Queues (0)	All tickets (1)		
	TICKET#	▼ AGE	TITLE	
	2015071510123456	122 d 22 h	Welcome to OTRS!	

Fig. 2.44: New Tickets Widget

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

Open Tickets				
My locked tickets (0)	Tickets in My Queues (0)	All tickets (0)		
	TICKET#	▼ AGE	TITLE	
none				



## 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.

#### See also:

Customer information can be changed in Customer Administration.

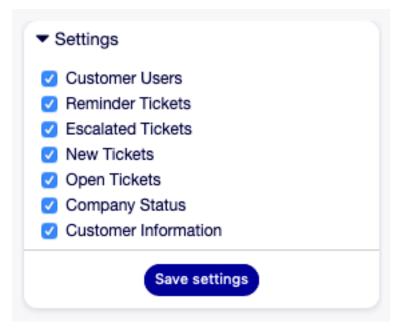


Fig. 2.46: Settings Widget

Company Status	
Escalated tickets:	0
Open tickets:	3
Closed tickets:	1
All tickets:	4

Fig. 2.47: Company Status Widget

Customer Information	tion
Customer:	Acme Inc.
Comment:	A great company

Fig. 2.48: Customer Information Widget

# 2.3.2 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.

## 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.

Search			×
	Customer User:		
	Fig. 2.49	19: Customer User Search Dialog	

Note: 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.

**Note:** 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.

#### See also:

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:

Customer IDs					Settings	
+ Change Customer Relations						
CUSTOMER ID	NAME	OPEN	CLOSED	EDIT	Customer User Info	ormation
acme.co	Acme Inc.	3	1	2011	Firstname:	Wyle
					Lastname:	
eminder Tickets						
					Username:	we
assigned to customer user   Acc	essible for customer user	My locked tickets (0)	My responsibilities (0)		Email: N	we@acme.example.con
ickets in My Queues (0)   Tickets i	n My Services (0)   All tic	kets (0)				
TICK	KET#	AGE	TITLE		Customer Information	on
none					Customer:	Acme Inc.
scalated Tickets					Comment: /	A great company
	essible for customer user	My locked tickets (0)	My responsibilities (0)			
Assigned to customer user   Acc	essible for customer user	My locked tickets (0)	My responsibilities (0)			
			My responsibilities (0)			
	n My Services (0)   All tic		My responsibilities (0)			
ickets in My Queues (0)   Tickets i	n My Services (0)   All tic	kets (0)				
ickets in My Queues (0)   Tickets i	n My Services (0)   All tic	kets (0)				
ickets in My Queues (0)   Tickets in My Queues (0)   Tickets in Tickets in Tickets in Tickets in Tickets in the	n My Services (0)   All tic	kets (0)				
ickets in My Queues (0)   Tickets in Tickets in none lew Tickets	n My Services (0)   All tic GET#	kets (0) AGE	TITLE			
ew Tickets	n My Services (0)   All tic GET#	kets (0) AGE	TITLE			
ickets in My Queues (0)   Tickets i none lew Tickets assigned to customer user   Acc	n My Services (0)   All tic EET# essible for customer user	AGE	TITLE			
ickets in My Queues (0)   Tickets i none lew Tickets assigned to customer user   Acc	n My Services (0)   All tic CET# essible for customer user n My Services (0)   All tic	AGE	TITLE			
ickets in My Queues (0)   Tickets in none lew Tickets issigned to customer user   Acc ickets in My Queues (0)   Tickets i	n My Services (0)   All tic CET# essible for customer user n My Services (0)   All tic	kets (0) AGE My locked tickets (0)	TITLE My responsibilities (0)			
Ickets in My Queues (0)   Tickets i none Iew Tickets Assigned to customer user   Acco Ickets in My Queues (0)   Tickets i   Tickets   Tickets	n My Services (0)   All tic CET# essible for customer user n My Services (0)   All tic	kets (0) AGE My locked tickets (0)	TITLE My responsibilities (0)			
ickets in My Queues (0)   Tickets i none iew Tickets issigned to customer user   Acct ickets in My Queues (0)   Tickets i ICKET	n My Services (0)   All tic CET# essible for customer user n My Services (0)   All tic	kets (0) AGE My locked tickets (0)	TITLE My responsibilities (0)			
ickets in My Queues (0)   Tickets i none iew Tickets issigned to customer user   Acco ickets in My Queues (0)   Tickets i none rpen Tickets	n My Services (0)   All tic (ET# essible for customer user n My Services (0)   All tic ET#	AGE AGE My locked tickets (0) Kets (0) VAGE	My responsibilities (0)			
Ickets in My Queues (0)   Tickets in none Iew Tickets Assigned to customer user   Acco Ickets in My Queues (0)   Tickets in TICKET none	n My Services (0)   All tic (ET# essible for customer user n My Services (0)   All tic ET#	AGE AGE My locked tickets (0) Kets (0) VAGE	My responsibilities (0)			
ickets in My Queues (0)   Tickets i none ew Tickets assigned to customer user   Acco ickets in My Queues (0)   Tickets i none pen Tickets assigned to customer user   Acco	n My Services (0)   All tic GET# essible for customer user In My Services (0)   All tic ET# essible for customer user	AGE My locked tickets (0)  Kets (0)  AGE  My locked tickets (2)	My responsibilities (0)			
ckets in My Queues (0)   Tickets i none ew Tickets ssigned to customer user   Acc ckets in My Queues (0)   Tickets i none pen Tickets ssigned to customer user   Acc	n My Services (0)   All tic GET# essible for customer user In My Services (0)   All tic ET# essible for customer user	AGE My locked tickets (0)  Kets (0)  AGE  My locked tickets (2)	My responsibilities (0)			
Ickets in My Queues (0) Tickets in none Iew Tickets Assigned to customer user   Acc Tickets in My Queues (0)   Tickets i None Deen Tickets Assigned to customer user   Acc	n My Services (0)   All tic ET# essible for customer user n My Services (0)   All tic ET# essible for customer user n My Services (0)   All tic ¥ AGE	ikets (0) AGE My locked tickets (0) AGE Kets (0) AGE Kets (0) AGE Kets (0) AGE	My responsibilities (0)	ations		
New Tickets Assigned to customer user   Acco Tickets in My Queues (0)   Tickets i none Dpen Tickets Assigned to customer user   Acco Tickets in My Queues (3)   Tickets i Tickets in My Queues (3)   Tickets i Tickets in My Queues (3)   Tickets i	n My Services (0)   All tic ET# essible for customer user n My Services (0)   All tic ET# essible for customer user n My Services (0)   All tic VAGE 1000027 7 d 20 h	ikets (0) AGE My locked tickets (0) AGE Kets (0) AGE Kets (0) AGE Kets (0) AGE	My responsibilities (0)   TITLE My responsibilities (3)   k (Dynamic Field) Network Opera	ations		

# Fig. 2.50: Customer User Information Center Dashboard

Customer IDs				
CUSTOMERID	NAME	OPEN	CLOSED	EDIT
stark-industries	Stark Industries	0	0	ð

Fig. 2.51: 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.

Reminder Tickets			
Assigned to customer user   Accessible for customer user	My locked tickets (0)   My	responsibilities (0)	
Tickets in My Queues (0)   Tickets in My Services (0)   All tic	:kets (0)		
TICKET#	AGE	TITLE	
none			

Fig. 2.52: 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.

Escalated Tickets			
Assigned to customer user   Accessible for custome	r user   My locked tickets (0)   My	responsibilities (0)	
Tickets in My Queues (0)   Tickets in My Services (0)	All tickets (0)		
TICKET#	AGE	TITLE	
none			

Fig. 2.53: 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.

New Tickets			
Assigned to customer user   Accessible for customer us	ser   My locked tickets (0)   My	responsibilities (0)	
Tickets in My Queues (0)   Tickets in My Services (0)   A	ll tickets (0)		
TICKET#	▼AGE	TITLE	
none			



en Ticke	ets		
ned to	customer user   Accessible for	customer user	My locked tickets (2) My responsibilities (3)
cets in My	/ Queues (3)   Tickets in My Servi	ices (0)   All tic	ckets (3)
ets in My	Queues (3)   Tickets in My Serv		
	7 Queues (3)   Tickets in My Serv TICKET# 2020112549000027	ices (0)   All tic ▼AGE 7 d 20 h	:kets (3) TITLE Test Internal Helpdesk (Dynamic Field) Network Operations
cets in My	TICKET#	▼AGE	TITLE

Fig. 2.55: Open Tickets Widget

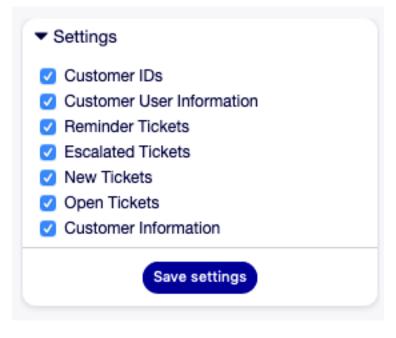


Fig. 2.56: Settings Widget

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

Customer User Inf	ormation
Firstname:	Wyle
Lastname:	Coyote
Username:	we
Email:	we@acme.example.com

Fig. 2.57: Customer User Information Widget

The Customer Information widget displays information about the current customer.

Customer Information	tion
Customer:	Acme Inc.
Comment:	A great company

Fig. 2.58: Customer Information Widget

#### See also:

Customer user information can be changed in Customer User Administration.

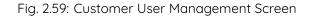
# 2.3.3 Customer User Administration

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.

Actions	List (1 total)					
• Q	USERNAME	NAME	EMAIL	CUSTOMER ID	LAST LOGIN	VALIDITY
Wildcards like *** are allowed.	we	Wyle Coyote	we@acme.example.com	acme.co	11/19/2020 13:03 (Europe/Berlin)	valid
Add Customer User						
Database Backend						



## Manage Customer Users

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

**Note:** 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.

**Warning:** 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.

**Note:** 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

Edit Customer User		
Title or salutation:		
* Firstname:	Wyle	
* Lastname:	Coyote	
* Username:	we	
Password:	••••••	
* Email:	we@acme.example.com	
* CustomerID:	acme.co	
Phone:		
Fax:		
Mobile:		
Street:		
Zip:		
City:		
Country:		
Comment:		
* Valid:	valid	
Google Authenticator:		
	Enter your shared secret to enable two factor a you add the shared secret to your generator ap Otherwise you will be not able to login anymore Secret	oplication and the application works well.
Interface language:	English (United States)	
	Select the main interface language.Language	
Time Zone:	UTC	
	Select your personal time zone. All times will b	e displayed relative to this time zone. Time
	Zone	
Ticket overview:	off	
	Select after which period ticket overviews show	uld refresh automatically.Refresh interval
Number of displayed tickets:	25	
	Select how many tickets should be shown in o	verviews by default. Tickets per page
PGP Key:	Durchsuchen Keine Datei ausgewählt.	
	Upload your PGP key.PGP Key	
	Save or Save and finish or Cancel	

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.

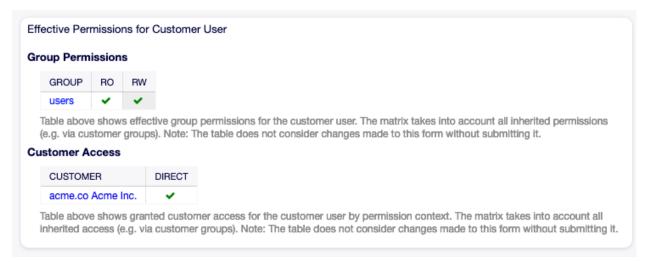


Fig. 2.62: Effective Permissions for Customer User Widget

#### See also:

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

Note: Only administrators can add customer users to groups.

#### Customer User Settings

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

Note: 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.

# 2.3.4 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.

Actions	(1 total)					
•	Q CUSTOMER IE	NAME	COMMENT	VALIDITY	CHANGED	CREATED
/ildcards like '*' are allowed.					11/02/2020	11/02/2020
	acme.co	Acme Inc.	A great company	valid	13:35	13:35
+ Add Customer					(Europe/Berlin)	(Europe/Berlir

Fig. 2.63: Customer Management Screen

#### Manage Customers

**Note:** 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.

**Warning:** 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.
- 2. Modify the fields.

Add Customer	
* CustomerID:	
* Customer:	
Street:	
Zip:	
City:	
Country:	
URL:	
Comment:	
* Valid:	valid

Fig. 2.64: Add Customer Screen

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.

**Note:** 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.

## **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.

dit Customer	
* CustomerID:	acme.co
* Customer:	Acme Inc.
Street:	123 Anywhere St.
Zip:	12346
City:	Somevillage
Country:	United States of America x
URL:	https://acme.example.com
Comment:	A great company
* Valid:	valid

Fig. 2.65: 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.

# 2.4 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.

# 2.4.1 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.

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

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.

#### **Calendar Overview**

Actions

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

Calendar

Fig. 2.66: No Calendars Found

Noi	nth	Wee	k [	Day	Ti	melin	e Mo	nth	Tim	eline	Wee	k T	imeli	ne Da	ay						Jump	т	oday		<	>
										30	No	v – 6	i De	c 20	20 #	49										
			MON	N, 30	NOV									TUE,	1 DEC	)						١	NED,	2 DE	С	
)6	08	10	12	14	16	18	20	22	00	02	04	06	08	10	12	14	16	18	20	22	00	02	04	06	08	10

# Fig. 2.67: Calendar Overview Screen

Check or uncheck the checkboxes in the Calendars widget to show or hide appointments in a specific calendar.

Just sta	rt typing to filter	
	NAME	URL

Fig. 2.68: 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.

**Note:** 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.

### See also:

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:

* Title:	
Description:	
	A
Location:	
* Calendar:	
	Resource
	This feature is currently not available.
	Date/Time
Start date:	12 •/ 03 •/ 2020 • 😇 - 18 •: 00 •
End date:	12 •/ 03 •/ 2020 • 😇 - 19 •: 00 •
All-day:	
Repeat:	Never
	Notification
Notification:	No notification
	Link

	Basic information
* Title:	Customer Meeting
Description:	
Location:	
* Calendar:	admin-calender x
	Resource
	This feature is currently not available.
	Date/Time
Start date:	12 •/ 03 •/ 2020 • • • 18 •: 00 •
End date:	12 •/03 •/2020 • 📅 - 19 •:00 •
All-day:	
Repeat:	Never
	Notification
Notification:	No notification



Ticket:

Fig. 2.70: Edit Appointment Dialog

4

k.

- 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.

# 2.4.2 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.

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

Agenda Ov	Agenda Overview										
Month Week Day											
Manage C	Calendars 🕂 🕂 Add App	pointment	1	1/23/2020 - 11/29/202	<b>10</b> #48		Today < >				
C	CALENDAR	TITLE	START DATE	END DATE	ALL-DAY	REPEAT	NOTIFICATION				
No data found	d.										

Fig. 2.71: No Calendars Found

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

Agenda Overview											
Monti	h Week Day	/									
	Manage Calendars         Add Appointment         11/30/2020 - 12/06/2020 #49         Today         >										
	CALENDAR	TITLE	START DATE	END DATE	ALL-DAY	REPEAT	NOTIFICATION				
12/03	3/2020										
	admin- calender	Customer Meeting	12/03/2020 18:00:00 (Europe/Berlin)	12/03/2020 19:00:00 (Europe/Berlin)	No	No	No				

Fig. 2.72: Agenda Overview Screen

## 2.4.3 Resource Overview

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

# 2.4.4 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.



## Upgrade to OTRS service package. Please contact us at sales@otrs.com for an upgrade.

## Find out more

Fig. 2.73: Upgrade Dialog

## 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.

#### See also:

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

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

**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.

See also:

×

	Basic information
* Title:	
Description:	
Location:	
* Calendar:	
	Resource
	This feature is currently not available.
	Date/Time
Start date:	12 •/ 03 •/ 2020 • • • 18 •:00 •
End date:	12 •/ 03 •/ 2020 • 📅 - 19 •: 00 •
All-day:	
Repeat:	Never
	Notification
Notification:	No notification
	Link

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.

Note: 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).
- 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.

	Date/Time
Start date:	12 - / 01 - / 2020 - 08 - 00 -
End date:	12 •/01 •/2020 • 📅 - 16 •:00 •
All-day:	
Repeat:	Every Day
	until

Fig. 2.75: 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.

Month	Week	Day	٦	Timeli	ine Mo	nth	Timel	ine We	eek	Timeli	ne Day				Ju	mp	Toda	ау	<	>
								30 N	ov -	- 6 De	c 2020	#49	)							
	τι	JE, 1 D	EC							WE	D, 2 DE	С					THU	, 3 DE	EC	



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.

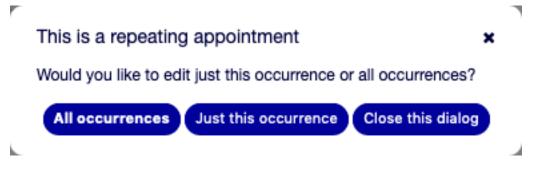


Fig. 2.77: Edit Repeating Appointment

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.

# 2.5 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.

# 2.5.1 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.

Lock	Priority	Change Ticket	People 🕶	Communication - Pending   Close	e   Quick Close   Miscellaneous -	ф	<ul> <li>Ticket Information</li> </ul>	ion
ve -		]					Age:	14 d 21 h
rticle Ove	erview - 1	Article(s)						11/19/2020 13:07 (Europe/Berlin)
0. 🔶	-	SENDER	VIA	SUBJECT	CREATED	8		Super Admin
0. 😭	#	Wyle	VIA	SUBJECT	CREATED	10	State:	
1	←	Coyote	Phone	User cannot login to his mail	11/19/2020 13:07		Locked:	unlock
		,					Priority:	3 normal
1 – Lleor (	cannot los	ain to his mail	account -	Wyle Coyote - 11/19/2020 13:07	(Europo/Borlin) vi		Queue:	Misc
- User (	Sannor 10	gin to his mall	account -	Type 00y0te - 11/18/2020 13.0/	(Europe/Denni) vi	4	Customer ID:	acme co
To open	links in the	a following article	vou might r	need to press Ctrl or Cmd or Shift key v	while clicking the link (depending on )	/our 🗙	Accounted time:	
To open	links in the	e following article	, you might r	need to press Ctrl or Cmd or Shift key v browser and OS).	while clicking the link (depending on y	/our 🗙	Accounted time:	
		e following article			while clicking the link (depending on )	your 🗙	Accounted time: Owner:	0
Mark   P	rint   Split	-	eply	browser and OS).	while clicking the link (depending on y	your X	Accounted time: Owner:	0 Super Admin Admin OTOBO mation
Mark   P	rint   Split	t   Forward   Re	eply	browser and OS).	while clicking the link (depending on y	your ×	Accounted time: Owner: Responsible:	0 Super Admin Admin OTOBO mation Wyle
Mark   P	rint   Split	t   Forward   Re	eply	browser and OS).	while clicking the link (depending on y	your X	Accounted time: Owner: Responsible: Customer Infor Firstname:	0 Super Admin Admin OTOBO mation Wyle Coyote
Mark   P	rint   Split	t   Forward   Re	eply	browser and OS).	while clicking the link (depending on y	your X	Accounted time: Owner: Responsible: Customer Infon Firstname: Lastname: Username:	0 Super Admin Admin OTOBO mation Wyle Coyote we
Mark   P	rint   Split	t   Forward   Re	eply	browser and OS).	while clicking the link (depending on y	your X	Accounted time: Owner: Responsible: Customer Infon Firstname: Lastname: Username:	0 Super Admin Admin OTOBO mation Wyle Coyote we we@acme.example.c
Mark   P	rint   Split	t   Forward   Re	eply	browser and OS).	while clicking the link (depending on y	your X	Accounted time: Owner: Responsible: Customer Inform Firstname: Lastname: Username: Ernail: Customer:	0 Super Admin Admin OTOBO mation Wyle Coyote we we@acme.example.c Acme Inc.
Mark   P	rint   Split	t   Forward   Re	eply	browser and OS).	while clicking the link (depending on y	vour ¥	Accounted time: Owner: Responsible: Customer Inform Firstname: Lastname: Username: Ernall: Customer: Street:	0 Super Admin Admin OTOBO mation Wyle Coyote we we@acme.example.c
Mark   P	rint   Split	t   Forward   Re	eply	browser and OS).	while clicking the link (depending on y	vour ¥	Accounted time: Owner: Responsible: Customer Infor Firstname: Lastname: Username: Ernali Customer: Street: Zip:	0 Super Admin Admin OTOBO mation Wyle Coyote we we@acme.example.c Acme Inc. 123 Anywhere St.
Mark   P	rint   Split	t   Forward   Re	eply	browser and OS).	while clicking the link (depending on y	vour X	Accounted time: Owner: Responsible: Customer Infor Firstname: Lastname: Username: Ernali Customer: Street: Zip: City:	0 Super Admin Admin OTOBO mation Wyle Coyote we we@acme.example.c Acme Inc. 123 Anywhere St. 12346
Mark   P	rint   Split	t   Forward   Re	eply	browser and OS).	while clicking the link (depending on y	vour ¥	Accounted time: Owner: Responsible: Customer Infor Firstname: Lastname: Username: Email: Customer: Street: Zip: City: Country:	0 Super Admin Admin OTOBO mation Wyle Coyote we we@acme.example.c Acme Inc. 123 Anywhere St. 12346 Somevillage

Fig. 2.78: Ticket Zoom Screen

QueueView: Raw	
My Queues (0) Misc (3/1) Raw (4/3)	
All tickets 4 Available tickets 3	0
Bulk	1-4 of 4 S M L



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.

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.

#### Small Queue View

This view lists tickets in a table format.

All ti	ickets 3	Availa	ible tickets 1										
Bulk												1-3	of 3 S M L
			TICKET#	AGE	SENDER	TITLE	STATE	T	LOCK T	QUEUE	OWNER	τ	CUSTOMER ID
	-		2020111949000011	14 d 21 h	Wyle Coyote	User cannot login to his mail account	open		unlock	Misc	Super Admin		acme.co
	-	*	2020112549000018	8 d 18 h	Wyle Coyote	Test Internal Helpdesk (Dynamic Field)	open		lock	Misc	Admin OTOBO		acme.co
	-	A	2020112549000027	8 d 15 h	Wyle Coyote	Test Internal Helpdesk (Dynamic Field) Network Operations	open		lock	Misc	Admin OTOBO		acme.co

Fig. 2.80: 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.

**Note:** 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.

**Note:** 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.

QueueView: Misc								
My Queues (0) Misc (3/1) Raw (4/3)								
All tickets 3 Available tickets 1	٥							
Bulk   Lock   Zoom   History   Priority   Note   Close   Quick Close   - Move -	1-3 of 3 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.

#### Medium Queue View

This view lists tickets in a list view format.

Queu	QueueView: Misc										
My Q	ueues (0) Misc (3/1) Raw (4/3)										
All ticl	All tickets 3 Available tickets 1										
	□   Bulk   Order by "Age" (descending) ◊ 1-3 of 3 S M L										
		- User cannot login to his ma									
	Sender Wyle Coyote	Age 14 d 21 h	Queue Misc	Customer ID acme.co	First Response Time						
	Created 11/19/2020 13:07:51 (Europe/	State open	iniso	Update Time							
	Subject User cannot login to his mail a	Owner / Responsible Super Admin / Admin OTOBO	Lock unlock		Solution Time						

Fig. 2.81: 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.

Queu	QueueView: Misc										
My Q	My Queues (0) Misc (3/1) Raw (4/3)										
All ticl	All tickets 3 Available tickets 1										
	Bulk         Order by "Age" (descending)         3         S         M         L										
			_	_							
	Ticket#2020111949000011 ·	<ul> <li>User cannot login to his ma</li> </ul>	ail a Lock   Zoom   History   Priority	Note   Close   Quick Close   - M	love -						
	Sender	Age	Queue	Customer ID	First Response Time						
	Wyle Coyote	14 d 21 h	Misc	acme.co							
	Created	State		Update Time							
	11/19/2020 13:07:51 (Europe/	open									
	Subject	Owner / Responsible	Lock		Solution Time						

Fig. 2.82: Floating Menu of Medium Queue View

## Large Queue View

This view lists tickets in a detailed format.

Queue	eView: Misc				
My Qu	eues (0) Misc (3/1) Raw (4	1/3)			
All ticks	ets 3 Available tickets 1				0
□∣в	ulk   Order by "Age" (desc	cending) ᅌ		1-3 of 3	S M L
	Ticket#202011194900	0011 – User cannot login to hi			
	Age 14 d 21 h	Queue Misc	"Wyle Coyote" <we@acme.example.com> - User cannot login to his mail account</we@acme.example.com>		
	Created	State	Print   Split   Forward   Reply		
	11/19/2020 13:07:51 (E	open	The user reports outlook will not accept his password.		
	Owner / Responsible Super Admin / Admin O	Lock			
	Customer ID acme.co				

Fig. 2.83: 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.

Queue	eView: Misc									
My Queues (0) Misc (3/1) Raw (4/3)										
All tickets 3 Available tickets 1										
□   B	ulk   Order by "Age" (desc	ending) ᅌ		1-3 of 3	SML					
	Ticket#2020111949000	0011 – User cannot login to hi	Lock   Zoom   History   Priority   Note   Close   Quick Close   - Move -	_						
	Age 14 d 21 h	Queue Misc	"Wyle Coyote" <we@acme.example.com> - User cannot login to his mail account</we@acme.example.com>							
	Created 11/19/2020 13:07:51 (E	State	Print   Split   Forward   Reply							
		open	The user reports outlook will not accept his password.							
	Owner / Responsible Super Admin / Admin O	Lock unlock								
	Customer ID acme.co									

Fig. 2.84: Floating Menu of Large Queue View

## Queue View Bulk Actions

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

Add Note		
Send Email		
Next state:		
Queue:		
Owner:		
Responsible:		
Priority:		
Merge:	O Merge to Ticket#:	
	O Merge to oldest	
Link together:	No	
Link to parent:		
Unlock tickets:	Yes	

Fig. 2.85: Queue View Bulk Action Screen

## 2.5.2 Service View

### See also:

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.

Service View: Computer		
My Services (0) Computer (1)		
All tickets 1 Available tickets 1		0
Bulk	1-1 of 1	S M L



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.

#### Small Service View

This view lists tickets in a table format.

Service View: Computer													
My Services (0) Computer (1)													
All ti	All tickets 1 Available tickets 1												
Bulk												1-1 of 1	S M L
			TICKET#	▲ AGE	SENDER	TITLE	STATE	LOC	κT	QUEUE T	OWNER	CUSTOMER ID T	SERVICE
			2020120449000029	0 m	Wyle Coyote	Computer makes noise	open	unk	ock	Raw	Super Admin	acme.co	Computer
							$\odot$						
						Powered	d by Rother O	SS					

Fig. 2.87: 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.

**Note:** 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.

**Note:** 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.

Service View: Computer									
My Services (0) Computer (1)									
All tickets 1 Available tickets 1		0							
Bulk   Lock   Zoom   History   Priority   Note   Close   Quick Close   - Move -	1-1 of 1	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..

#### Medium Service View

This view lists tickets in a list view 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.

My Services (0) Computer (1)								
l tick	kets 1 Available tickets 1							
6	Bulk   Order by "Age" (descending	ng) ᅌ			1-1 of 1 S M			
_	Tieket#202012044000020	Computer makes noise						
	Ticket#2020120449000029	•			1			
	Sender	Age	Queue	Customer ID	First Response Time			
)	Sender Wyle Coyote	Age 6 m	Queue Raw	acme.co	First Response Time			
	Sender Wyle Coyote Created	Age 6 m State			First Response Time			
	Sender Wyle Coyote	Age 6 m		acme.co	First Response Time			
	Sender Wyle Coyote Created	Age 6 m State		acme.co	First Response Time Solution Time			

Fig. 2.88: Medium Service View Screen

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.

Service View: Computer										
My Services (0) Computer (1)										
All tickets 1 Available tickets 1										
Bulk   Order by "Age" (descending	Bulk     Order by "Age" (descending)     Image: Control of the second se									
Ticket#2020120449000029	<ul> <li>Computer makes noise</li> </ul>	Lock   Zoom   History   Priority	Note   Close   Quick Close	- Move -						
Sender	Age	Queue	Customer ID	First Response Time						
Wyle Coyote	6 m	Raw acme.co								
Created	State		Update Time							
12/04/2020 15:38:36 (Europe/ open										
Subject	Owner / Responsible	Lock	Service	Solution Time						
Computer makes noise	Super Admin / Super Admin	unlock	Computer							

Fig. 2.89: Floating Menu of Medium Service View

#### 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.

## Service View Bulk Actions

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

Servi	ce View: Computer			
My Se	ervices (0) Computer (1)			
All tick	ets 1 Available tickets 1			<
	Bulk   Order by "Age" (desc	cending) ᅌ		1-1 of 1 S M L
	Ticket#202012044900	0029 – Computer m	akes noise	
	Age 10 m	Queue Raw	"Wyle Coyote" <we@acme.example.com> - Computer makes noise</we@acme.example.com>	12/04/2020 15:38 (Europe/Berlin)
	Created 12/04/2020 15:38:36 (E	State	Print   Split   Forward   Reply Running computer makes an unusual loud noise.	
	Service Computer			
	Owner / Responsible Super Admin / Super Ad	Lock unlock		
	Customer ID acme.co			





Fig. 2.91: Floating Menu of Large Service View

Add Note		
Send Email		
Next state:		
Queue:		
Owner:		
Responsible:		
Priority:		
Merge:	O Merge to Ticket#:	
	O Merge to oldest	
Link together:	No	
Link to parent:		
Unlock tickets:	Yes	

Fig. 2.92: Service View Bulk Action Screen

# 2.5.3 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.

Status View: Open tickets								
Open tickets 9 Closed tickets 1	0							
Bulk	1-9 of 9 S M L							



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

## **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.
- 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.

Status View: Open tickets									
Open tickets 9 Closed tickets 1									
Bulk 1-9 of 9 S M L									
	TICKET#	▼AGE	SENDER	TITLE	STATE T	LOCK T	QUEUE T	OWNER T	CUSTOMER ID
	2020120449000029	23 m	Wyle Coyote	Computer makes noise	open	unlock	Raw	Super Admin	acme.co
	2020120449000011	5 h 9 m	Wyle Coyote	Computer doesn't start	open	lock	Raw	Super Admin	acme.co

Fig. 2.94: Small Status View Screen

- 3. Rearrange columns in Visible Columns by drag and drop.
- 4. Click on the Save button.

**Note:** 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.

**Note:** 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.

Status View: Open tickets							
Open tickets 9 Closed tickets 1	٥						
Bulk   Lock   Zoom   History   Priority   Note   Close   Quick Close   - Move -	1-9 of 9 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.

### **Medium Status View**

This view lists tickets in a list view format.

Status View: Open tickets				
Open tickets 9 Closed tickets 1	1			\$
☐ Bulk   Order by "Age" (ascending)				1-9 of 9 S M L
Ticket#20201204490	00029 – Computer makes noise			
Sender	Age	Queue	Customer ID	First Response Time
				First nesponse Time
Wyle Coyote	28 m	Raw	acme.co	ritst nesponse tillle
	28 m State	Raw	acme.co Update Time	First nesponse fillie
Wyle Coyote	State	Raw		гизт неэронэе типе
Wyle Coyote Created	State	Raw		Solution Time

Fig. 2.95: 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.

Status View: Open tickets				
Open tickets 9 Closed tickets 1				٥
Bulk   Order by	"Age" (ascending) ᅌ			1-9 of 9 S M L
Ticket#20201	20449000029 – Compu	er makes noise Lock   Zoom   H	History   Priority   Note   Close   Quick Close	e   - Move -
Sender	Age	Queue	Customer ID	First Response Time
Wyle Coyote	28 m	Raw	acme.co	
Created	State		Update Time	
12/04/2020 15:3	8:36 (Europe/ open			
Subject	Owner /	Responsible Lock	Service	Solution Time
Computer makes	s noise Super Ad	nin / Super Admin unlock	Computer	

Fig. 2.96: Floating Menu of Medium Status View

#### Large Status 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.

Status View: Open tickets				
Open ti	ickets 9 Closed tickets 1			0
B	ulk   Order by "Age" (asce	ending) 🗘		1-9 of 9 S M L
	Ticket#202012044900	0029 – Computer makes noise		
	Age 32 m	Queue Raw	"Wyle Coyote" <we@acme.example.com> - Computer makes noise</we@acme.example.com>	12/04/2020 15:38 (Europe/Berlin)
	Created	State	Print   Split   Forward   Reply	
	12/04/2020 15:38:36 (E	open	Running computer makes an unusual loud noise.	
Com	Service Computer			
	Owner / Responsible	Lock		
	Super Admin / Super Ad	unlock		
	Customer ID acme.co			

Fig. 2.97: Large Status View Screen

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.

Status View: Open tickets				
Opent	tickets 9 Closed tickets 1		•	
	Bulk   Order by "Age" (asce	ending) ᅌ	1-9 of 9 S M L	
0	Ticket#202012044900	0029 – Computer makes noise	Lock   Zoom   History   Priority   Note   Close   Quick Close   - Move -	
	Age 32 m	Queue Raw	"Wyle Coyote" <we@acme.example.com> - Computer makes noise 12/04/2020 15:38 (Europe/Berlin)</we@acme.example.com>	
	Created 12/04/2020 15:38:36 (E	State open	Print   Split   Forward   Reply Running computer makes an unusual loud noise.	
Se	Service Computer	Lock unlock		
	Owner / Responsible Super Admin / Super Ad			
	Customer ID acme.co			

Fig. 2.98: Floating Menu of Large Status View

## Status View Bulk Actions

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

# 2.5.4 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.

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.

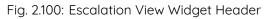
Each view has a filter in the top of the widget to list tickets only in a specific escalation time period.

**Today** Tickets, that have a deadline today.

Add Note	
Send Email	
Next state:	
Queue:	
Owner:	
Responsible:	
Priority:	
Merge:	O Merge to Ticket#:
	O Merge to oldest
Link together:	No
Link to parent:	
Unlock tickets:	Yes

Fig. 2.99: Status View Bulk Action Screen





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

## **Small Escalation View**

This view lists tickets in a table format.

cket Escalation View: Today			
Today 0 Tomorrow 0 Next week 0		0	
Bulk	0-0 of 0	S M L	
No ticket data found.			
$\odot$			
Powered by Rother OSS			

Fig. 2.101: Small 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.

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.

**Note:** 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.

**Note:** 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).		
<b>Unlock</b> 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.		

### Medium Escalation View

This view lists tickets in a list view format.

Ticket Escalation View: Today	
Today 0 Tomorrow 0 Next week 0	0
Bulk   Order by "Age" (ascending)	0-0 of 0 S M L
No ticket data found.	
$\otimes$	
Powered by Rother OSS	

Fig. 2.102: 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.

### Large Escalation View

This view lists tickets in a detailed format.

To limit the number of displayed tickets per page:

Ticket Escalation View: Today	
Today 0 Tomorrow 0 Next week 0	٥
Bulk   Order by "Age" (ascending)	0-0 of 0 S M L
No ticket data found.	
<i>~</i>	
Powered by Rother OSS	

# Fig. 2.103: Floating Menu of Medium Escalation View

Ticket Escalation View: Today		
Today 0 Tomorrow 0 Next week 0	0	
Bulk   Order by "Age" (ascending)	0-0 of 0 S M L	
No ticket data found.		
$\bigcirc$		
Powered by Rother OSS		

Fig. 2.104: Large Escalation 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 Escalation View section.

Ticket Escalation View: Today	
Today 0 Tomorrow 0 Next week 0	0
Bulk   Order by "Age" (ascending)	0-0 of 0 S M L
No ticket data found.	
$\otimes$	
Powered by Rother OSS	

Fig. 2.105: Floating Menu of Large Escalation View

# **Escalation View Bulk Actions**

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

# 2.5.5 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.

icket Bulk Action		Cancel & close
Add Note		
Send Email		
Next state:		
Queue:		
Owner:		
Responsible:		
Priority:		
Merge:	O Merge to Ticket#:	
	O Merge to oldest	
Link together:	No	
Link to parent:		
Unlock tickets:	Yes	
	Execute Bulk Action	

Fig. 2.106: Escalation View Bulk Action 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.

Note: 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.

See also:

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.

See also:

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.

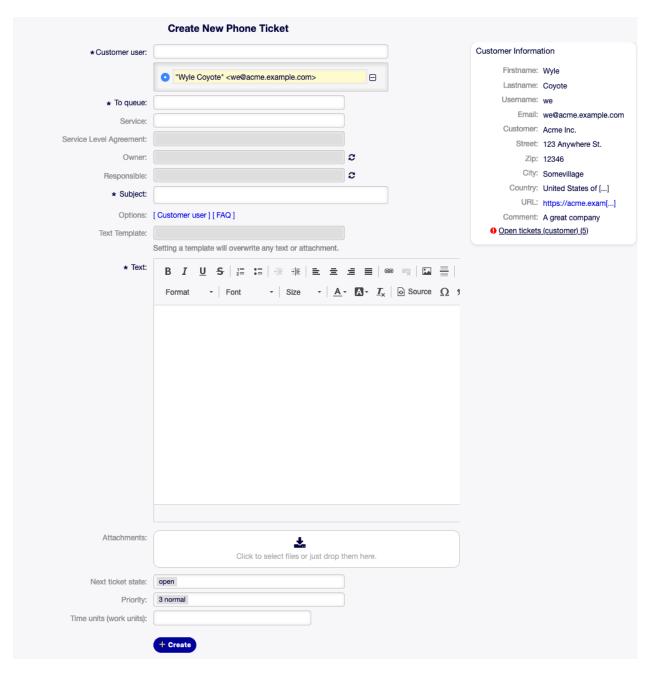


Fig. 2.107: New Phone Ticket Screen

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.

# 2.5.6 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.

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

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.

## See also:

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.

# See also:

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.

	Create New Email Ticket		
* To customer user:			Customer Information
То	"Wyle Coyote" <we@acme.example.com></we@acme.example.com>		Firstname: Wyle
10	Wyle Coyote <wewachie.example.com></wewachie.example.com>	8	Lastname: Coyote
Cc:			Username: we
Bcc:			Email: we@acme.example.com
* From queue:			Customer: Acme Inc.
			Street: 123 Anywhere St.
Service:			Zip: 12346
Service Level Agreement:			City: Somevillage Country: United States of []
Owner:	Ø		URL: https://acme.exam[]
Responsible:	0		Comment: A great company
Email security:			Open tickets (customer) (5)
Sign:			
Enormali	Keys/certificates will only be shown for a sender with more than first found key/certificate will be pre-selected. Please make sure		
Encrypt:	Keys/certificates will only be shown for recipients with more that	n one kov/cortificate. The	
	first found key/certificate will be pre-selected. Please make sure		
* Subject:			
Options:	[Customer user][FAQ]		
Text Template:			
	Setting a template will overwrite any text or attachment.		
* Text:			
	B I U S   ≟ :≡   ⊕ ⊕ ≡ ≡ ≡ Format -   Font -   Size -   <u>A</u> - [A]		
Signature:			_
			_
Attachments:	Ł		
	Click to select files or just drop them h	ere.	
Next ticket state:	open		
Priority:	3 normal		
Time units (work units):			
	+ Send mail		

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.

# 2.5.7 New Process Ticket

Note: 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.

Create New Process Ticket	
*Process:	

Fig. 2.109: 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.

#### See also:

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.

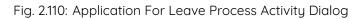
**Note:** The fields displayed depend on the process, therefore no explanation is described here for those fields.

# 2.5.8 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.

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

	Create New Process Ticket * Process: Book ordering
Subject: Text:	B I U S 注 : : : : : : : : : : : : : : : : : :
Attachments:	Click to select files or just drop them here.
Title:	
Author:	
ISBN:	
Status:	Approval
	Submit



Search	×
	Templates
Search template:	
	Create New
	Filters in use
Fulltext:	Θ
	Additional filters
Add another attribute:	
Output:	Normal
	Q Run search
	Fig. 2.111: Search Dialog

# 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.

Search		×
	Templates	
Search template:	Welcome x Create New Delete Profile link	
	Filters in use	
Fulltext:	Welcome	
	Additional filters	
Add another attribute:		
Output:	Normal	
	Q Run search	

Fig. 2.112: Search Templates Dialog

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.

Warning: 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.

# Filters in use

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

Search Results	5:								
Change search optio	ons (last-search)								0
Bulk								1-2	of 2 S M L
	TICKET#	▼AGE	SENDER	TITLE	STATE	LOCK	QUEUE	OWNER	CUSTOMER ID
	2020120449000029	1 h 16 m	Wyle Coyote	Computer makes noise	open	unlock	Raw	Super Admin	acme.co
	2020120449000011	6 h 2 m	Wyle Coyote	Computer doesn't start	open	lock	Raw	Super Admin	acme.co



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

# 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.

# 2.5.9 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.

This screen has an own menu and contains several widgets.

### Ticket Menu

The Ticket Zoom screen has an own menu.

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

**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.

**Warning:** 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.

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

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

Lock	Priority	Change Ticket	People -	Communication - Pending Clos	e   Quick Close   Miscellaneous -	0	<ul> <li>Ticket Informat</li> </ul>	ion
ve -							Age:	14 d 21 h
rticle Ov	verview -	1 Article(s)					Created:	11/19/2020 13:07 (Europe/Berlin)
			104	ALL FOT	0054750			Super Admin
0. 🤺	=	SENDER	VIA	SUBJECT	CREATED	8	State:	open
1	←	Coyote	Phone	User cannot login to his mail	11/19/2020 13:07		Locked:	unlock
		obyote					Priority:	3 normal
1.1.0		agin to his	Language	Wyle Coyote – 11/19/2020 13:07	/ (Europo/Borlin) vi	i	Queue:	Misc
I – User	rcannot	ogin to his ma	account -	wyle Coyote - 11/19/2020 13:0/	(Europe/Benin) vi	1	Customer ID:	acme.co
						Accounted time:	0	
To one	en links in t	he following artic	e vou might n	eed to press Ctrl or Cmd or Shift key	while clicking the link (depending on t	vour X		-
То оре	en links in t	he following artic	e, you might r	need to press Ctrl or Cmd or Shift key browser and OS).	while clicking the link (depending on	your 🗙		Super Admin
		he following artic			while clicking the link (depending on	your 🗙	Owner:	Super Admin Admin OTOBO
Mark	Print   Sp		leply	browser and OS).	while clicking the link (depending on	your ×	Owner: Responsible:	Admin OTOBO mation
Mark	Print   Sp	lit   Forward   F	leply	browser and OS).	while clicking the link (depending on the second seco	your ×	Owner: Responsible: Customer Infor Firstname:	Admin OTOBO mation Wyle
Mark	Print   Sp	lit   Forward   F	leply	browser and OS).	while clicking the link (depending on the second seco	your ×	Owner: Responsible: Customer Infor Firstname: Lastname:	Admin OTOBO mation Wyle Coyote
Mark	Print   Sp	lit   Forward   F	leply	browser and OS).	while clicking the link (depending on the second seco	your ×	Owner: Responsible: Customer Infor Firstname: Lastname: Username:	Admin OTOBO mation Wyle Coyote we
Mark	Print   Sp	lit   Forward   F	leply	browser and OS).	while clicking the link (depending on the second seco	your ×	Owner: Responsible: Customer Infor Firstname: Lastname: Username: Email:	Admin OTOBO mation Wyle Coyote we we@acme.example.
Mark	Print   Sp	lit   Forward   F	leply	browser and OS).	while clicking the link (depending on the second seco	your ×	Owner: Responsible: Customer Infor Firstname: Lastname: Username: Email: Customer:	Admin OTOBO mation Wyle Coyote we we@acme.example.e Acme Inc.
Mark	Print   Sp	lit   Forward   F	leply	browser and OS).	while clicking the link (depending on the second seco	your ×	Owner: Responsible: Customer Infor Firstname: Lastname: Username: Ernall: Customer: Street:	Admin OTOBO mation Wyle Coyote we we@acme.example.c Acme Inc. 123 Anywhere St.
Mark	Print   Sp	lit   Forward   F	leply	browser and OS).	while clicking the link (depending on the second seco	your ×	Owner: Responsible: Customer Infor Firstname: Lastname: Username: Email: Customer: Street: Zip:	Admin OTOBO mation Wyle Coyote we we@acme.example.c Acme Inc. 123 Anywhere St. 12346
Mark	Print   Sp	lit   Forward   F	leply	browser and OS).	while clicking the link (depending on the second seco	your ×	Owner: Responsible: Customer Infor Firstname: Lastname: Username: Email: Customer: Street: Zip: City:	Admin OTOBO mation Wyle Coyote we@acme.example.c Acme Inc. 123 Anywhere St. 12346 Somevillage
Mark	Print   Sp	lit   Forward   F	leply	browser and OS).	while clicking the link (depending on the second seco	your X	Owner: Responsible: Customer Infor Firstname: Lastname: Username: Email: Customer: Street: Zip: City: Country:	Admin OTOBO mation Wyle Coyote we@acme.example.c Acme Inc. 123 Anywhere St. 12346 Somevillage United States of []
Mark	Print   Sp	lit   Forward   F	leply	browser and OS).	while clicking the link (depending on the second seco	your X	Owner: Responsible: Customer Infor Firstname: Lastname: Username: Email: Customer: Street: Zip: City: Country:	Admin OTOBO mation Wyle Coyote we@acme.example.c Acme Inc. 123 Anywhere St. 12346 Somevillage

Fig. 2.114: Ticket Zoom Screen

Back Unlock   Priority   Change Ticket	People  Vert Communication  Vert Pending Close Quick Close Process	0
Miscellaneous - Move -	]	

Fig. 2.115: Ticket Menu

Change Priority of Ticket#20	20111949000011 — User cannot login to his mail account	Cancel & close
▼ Ticket Settings		
Priority:	3 normal 💌	
✓ Add Article		
* Subject:		
Options:	[FAQ]	
* Text:	B I U S I≣ ः≣ ﷺ ≇ ≥ ± ± ≡   ∞ ∞ I ⊑ ≣   ≪ → I Q	
	Format - Font - Size - <u>Α</u> - Δ. Θ Source Ω 99 9%	
	4	
Attachments:		
Attachments.	Click to select files or just drop them here.	
Is visible for customer:		
Time units (work units):		
	Submit Or Save as new draft	

Fig. 2.116: Change Priority 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.

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.

* New Owner: S	Super Admin	
icle		
* Subject:		
Options: [F	AQ]	
* Text:	B I U S   ≔ ≔   ≉ ≉   ≞ ≞ ≝ ≡   ∞ ∞   ⊡ ≣   ← →   Q	
	Format - Font - Size - A - A - A - O Source Ω 1/9 92 🔀	
Attachments:	*	
	Click to select files or just drop them here.	
visible for customer:	]	
visible for customer:		
Attachments:	Click to select files or just drop them here.	

Fig. 2.117: 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:	"Wyle Coyote <we@acme.example.com></we@acme.example.com>	Customer Informa	ition
Customer ID:	acme.co	Firstname:	Wyle
	Submit	Lastname:	Coyote
		Username:	we
		Email:	we@acme.example.c
		Customer:	Acme Inc.
		Street:	123 Anywhere St.
		Zip:	12346
		City:	Somevillage
		Country:	United States of []
		URL:	https://acme.exam[
		Comment:	A great company
		Open tickets	(customer) (5)

Fig. 2.118: Change Customer Screen

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.

**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.

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.

Add Note to Ticket#2020111	949000011 – User cannot login to his mail account	Cancel & close
<ul> <li>Ticket Settings</li> </ul>		
Service:		
Service Level Agreement:		
▼ Add Article		
* Subject:		
Options:	[FAQ]	
* Text:	B I U S   ≔ ≔   ≇ ≇   ≞ ≞ ≡   ∞ ∞   ⊡ ≣   ← →   Q	
	Format - Font - Size - $\underline{A}$ - $\underline{A}$ - $\underline{I}_x$ $\underline{O}$ Source $\Omega$ % % $\underline{J}_x$	
	A	
Attachments:		
	Click to select files or just drop them here.	
Is visible for customer:		
Time units (work units):		
	Submit Or Save as new draft	

Fig. 2.119: Add Note Screen

Phone Call for Ticket#20201	11949000011 — User cannot login to his mail account	
Cancel & close		
* Subject:		Customer Information
* Text:	B I U S   := :=   := :=   := := :=   := := :=   := := := := := := := := := := := := :=	Firstname: Wyle Lastname: Coyote Username: we Email: we@acme.example.com Customer: Acme Inc. Street: 123 Anywhere St. Zip: 12346 City: Somevillage Country: United States of [] URL: https://acme.exam[] Comment: A great company Open tickets (customer) (5)
Attachments: Next ticket state: Time units (work units):	Click to select files or just drop them here.	
	Submit Or Save as new draft	

Fig. 2.120: Phone Call 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.

Outbound Email for Ticket	#2020111949000011 — User cannot login to his mail account	Cancel & close
From:	OTOBO System <otobo@localhost></otobo@localhost>	
* To:		
Cc:		
Bcc:		
* Subject:	[Ticket#2020111949000011]	
Email security:		
Sign:		
	Keys/certificates will only be shown for a sender with more than one key/certificate. The first found key/certificate sure to select the correct one.	will be pre-selected. Please make
Encrypt:		
	Keys/certificates will only be shown for recipients with more than one key/certificate. The first found key/certificate sure to select the correct one.	e will be pre-selected. Please make
Options:	[FAQ]	
* Text:	B I U S I = :=   +E +E   = = = =   ∞ ∞   □ =   + +   Q Format •   Font •   Size •   A • □ • I <sub>x</sub>   ⊙ Source Ω */? ??   S Your Ticket-Team Super Admin  Super Support - Waterford Business Park S201 Blue Lagoon Drive - 8th Floor & 9th Floor - Miami, 33126 USA Email: hot@example.com - Web: http://www.example.com/ 	
		4
Attachments:	Click to select files or just drop them here.	
Next ticket state:	open x	
Visible for customer:		
Time units (work units):		
	Send mail Or Save as new draft	

Fig. 2.121: 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.

Note: 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.

Ticket Settings		
Next state:	pending reminder	
Pending date:	12 v/05 v/2020 v - 17 v: 22 v For all pending* states.	
Add Article		
* Subject:		
Options:	[FAQ]	
* Text:	B I U S   ♯ ☵   琲 琲   ☷ ☱ ☱ ☱ ☰   ☞ ☞   ဩ 틀   ♠ ≯   Q	
	Format - Font - Size - A - Ix O Source Ω 19 12	
		<b>A</b>
Attachments:	<b>L</b>	
	Click to select files or just drop them here.	
Is visible for customer:	0	
Time units (work units):		

Fig. 2.122: 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.

Ticket Settings		
Next state:	closed successful	
Add Article		
* Subject:		
Options:	[FAQ]	
* Text:	B I U S := := := := = = = = = ≈ ∞ □ = = . → Q	
	Format - Font - Size - <u>A</u> - <b>A</b>	
Attachments:	*	
	Click to select files or just drop them here.	
Is visible for customer:		
Time units (work units):		

Fig. 2.123: 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.

Note: 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.

story of FICKet#202	20111949000011 — User cannot login to his mail account	Cancel & clo
Just start typing to	p filter	Expand/collapse al
11/19/2020 13:0	07:51 (Europe/Berlin)	
AGENT	ACTION	ARTICLE
Super Admin	Created ticket [2020111949000011] in "Misc" with priority "3 normal" and state "open". (NewTicket)	
Super Admin	Changed service to "NULL" (). (ServiceUpdate)	
Super Admin	Changed SLA to "NULL" (). (SLAUpdate)	
Super Admin	Changed customer to "CustomerID=acme.co;CustomerUser=we;". (CustomerUpdate)	
Super Admin	Added phone call from customer. (PhoneCallCustomer)	Q
Super Admin	Changed owner to "sa" (2). (OwnerUpdate)	
12/04/2020 10:4	48:32 (Europe/Berlin)	
AGENT	ACTION	ARTICLE
Super Admin	Locked ticket. (Lock)	
Super Admin	Reset of unlock time. (Misc)	

#### Fig. 2.124: Ticket History Screen

**Note:** 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.

Change Free Text of Ticket#2015071510123456 — Welcome to OTRS! All fields marked with an asterisk (*) are mandatory. Cancel & close				
▼ Ticket Settings ★ Title: Welcome to OTRS!				
	Submit or Save as new draft			



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.

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

Manage links for Ticket#2020111949000011: User cannot login to his mail account				
Close this dialog				
Create new links Manage existing links				
Link with:	Ticket	)		
Ticket#:				
Title:				
Fulltext:				
State:				
Priority:				
	Q Start search			

Fig. 2.126: Link Ticket Screen

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.

**Warning:** 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.

#### Article Overview

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

<ul> <li>Merge Settings</li> </ul>		
* Merge to Ticket#:		
	Try typing part of the ticket number or title in order to search by it.	
	Imit the search to tickets with same Customer ID (acme.co).	
Inform Sender		
Inform sender:	0	
From:	OTOBO System <otobo@localhost></otobo@localhost>	
* To:	"Wyle Coyote" <we@acme.example.com></we@acme.example.com>	
* Subject:	Re: [Ticket#2020111949000011] User cannot login to his mail account	
* Text:	B I U S   ≝ ≅   ⊕ ⊕   ≡ ≡ ≡ ■ ∞ ∞   ≡   ← →   Q	
	Format $\bullet$ Font $\bullet$ Size $\bullet$ $\underline{A} \bullet$ $\underline{A} \bullet$ $\underline{I}_x$ $\underline{0}$ Source $\Omega$ 99 92 $\underline{5}_x$	
	Dear Wyle Coyote,	0
	Thank you for your request.	

Fig. 2.127: Ticket Merge Screen

NO.	≓	SENDER	VIA	SUBJECT	CREATED	٩
		Wyle	Phone	User cannot login to his mail	11/19/2020 13:07	

Fig. 2.128: 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.

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

## Article Zoom

This widget displays the details of the article. The widget has an own menu.

▼ #1 – User cannot login to his mail account – Wyle Coyote – 11/19/2020 13:07 (Europe/Berlin) vi	i
To open links in the following article, you might need to press Ctrl or Cmd or Shift key while clicking the link (depending on you browser and OS).	ir 🗙
Mark   Print   Split   Forward   Reply	
The user reports outlook will not accept his password.	R



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.

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.

Split			×
	Target:	Phone ticket	
L		Split	
		Fig. 2.130: Article Split Dialog	

Note: 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.

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.

**Note:** 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.

From:	OTOBO System <otobo@localhost></otobo@localhost>	
<b>*</b> To:		
Cc:		
Bcc:		
* Subject:	Fwd: [Ticket#2020111949000011] User cannot login to his mail account	
Email security:		
Sign:		
	Keys/certificates will only be shown for a sender with more than one key/certificate. The first found key/certificat sure to select the correct one.	e will be pre-selected. Ple
Encrypt:		
	Keys/certificates will only be shown for recipients with more than one key/certificate. The first found key/certificate sure to select the correct one.	te will be pre-selected. Pl
Options:	[FAQ]	
* Text:	B I U S   ⋮ ∶≡   ⋮ ⋮ ≡ ≡ ≡ ≡   ∞ ∞   ⊡ ≡   ← →   Q. Format •   Font •   Size •   <u>A</u> • ⊠• I <sub>x</sub>   ⊡ Source Ω 1/9 9%   53	
	Your Ticket-Team	
	Super Admin	
		<b>A</b>
Attachments:	*	
	Click to select files or just drop them here.	
Next ticket state:	closed successful x	
Visible for customer:		
Time units (work units):		

Fig. 2.131: Article Forward Screen

Compose Answer for Ticke	et#2020111949000011 — User cannot login to his mail account	Cancel & close
From:	OTOBO System <otobo@localhost></otobo@localhost>	
<b>*</b> To:		
То	"Wyle Coyote" <we@acme.example.com></we@acme.example.com>	
Cc:		
Bcc:		
* Subject:	Re: [Ticket#2020111949000011] User cannot login to his mail account	
Email security:		
Sign:	Keys/certificates will only be shown for a sender with more than one key/certificate. The first found key/certificate sure to select the correct one.	e will be pre-selected. Please make
Encrypt:	Keys/certificates will only be shown for recipients with more than one key/certificate. The first found key/certificat sure to select the correct one.	te will be pre-selected. Please make
Options:	[FAQ]	
* Text:	B $I \sqcup S$ $\downarrow = :=   =   = = = = = = = = = = = = = = $	
Attachments:	Click to select files or just drop them here.	
Next ticket state:	open x	
Visible for customer:		
Time units (work units):	Send mail Or Save as new draft	

Fig. 2.132: Compose Answer Screen

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

**Note:** 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.

### **Linked Objects**

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

Linkeu	: FAQ (1)				
FAQ#	TITLE	STATE	CREATED	LINKED AS	DELETE
49002	How to create a support	external	11/18/2020 15:43:26	Normal	~
49002	bundle	(customer)	(Europe/Berlin)	Normal	筪

#### Fig. 2.133: Linked Objects Widget

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.

#### See also:

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

### **Ticket Information**

This widget contains information about the ticket.

### **Customer Information**

This widget contains information about the customer.

Linked	: FAQ (1)				
FAQ#	TITLE	STATE	CREATED	LINKED AS	DELETE
49002	How to create a support	external	11/18/2020 15:43:26	Normal	
49002	bundle	(customer)	(Europe/Berlin)	Normai	Û

Fig. 2.134: Complex Linked Objects Widget

<ul> <li>Ticket Information</li> </ul>		
Age:	74 d 1 h	
Created:	09/21/2020 17:08 (Europe/Berlin)	
State:	new	
Locked:	lock	
Priority:	3 normal	
Queue:	Raw	
Customer ID:		
Accounted time:	0	
Owner:	Admin OTOBO	
Responsible:	Admin OTOBO	

Fig. 2.135: Ticket Information Widget

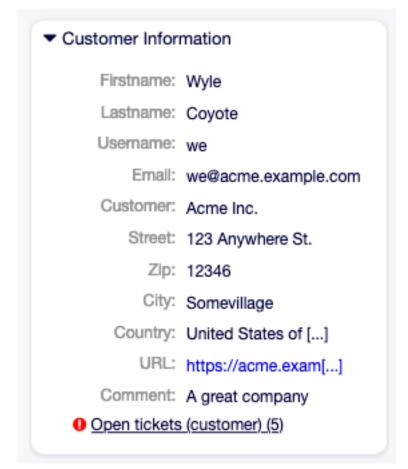


Fig. 2.136: Customer Information Widget

# 2.6 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.

# 2.6.1 Explorer

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

FAQ Explo	orer			
FAQ				
Subcategori	ies			Latest created FAQ articles
NAME	COMMENT Misc Comment	SUBCATEGORIES 0	FAQ ARTICLES	How to create a support bundle Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)
FAQ Artic	cles: FAQ		Computer is dead Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)	
			0-0 of 0	Latest updated FAQ articles
No FAQ data	found.		S How to create a support bundle Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)	
				Computer is dead Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)
				Top 10 FAQ articles
				1. Computer is dead Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)
				<ol> <li>How to create a support bundle</li> <li>Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)</li> </ol>

Fig. 2.137: FAQ Explorer Screen

This screen contains several widgets.

# FAQ Explorer Content Widgets

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

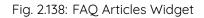
To select a category, just click on the name of a category.

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.

Misc				
				Latest created FAQ articles
COMMENT SUB	FAQ ARTICLE	s	How to create a support bundle	
pries found.				Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berli
				Computer is dead
a. Mina				Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berli
				Latest updated FAQ articles
TITLE	LANGUAGE	STATE	VALIDITY	Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berli
How to create a support bundle	en	external (customer)	valid	Computer is dead
Computer is dead	en	external (customer)		
	Arries found. Ars: Misc ITTLE How to create a support bundle	TITLE LANGUAGE How to create a support bundle en	aries found. <b>PS: Misc</b> ITTLE LANGUAGE STATE	aries found. TTLE LANGUAGE STATE VALIDITY



3. Click on the Submit button.

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

# FAQ Explorer Sidebar Widgets

The right sidebar lists the recently created, updated FAQ articles, as well as the top 10 FAQ articles.

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.

# 2.6.2 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.

# Latest created FAQ articles

How to create a support bundle

Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

Computer is dead

Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

# Latest updated FAQ articles

How to create a support bundle

Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

Computer is dead

Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

# Top 10 FAQ articles



Fig. 2.139: FAQ Explorer Sidebar

	Add FAQ Article						
	Ald 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:	B I U S   ≣ ≔   ﷺ ⊯   ≞ ≞ ≝ ≡   ∞ ∞   ⊑ ≣   ← →   Q						
(public)	Format - Font - Size - $\underline{A}$ - $\underline{A}$ - $\underline{I}_x$ O Source $\Omega$ % % $\Sigma$						
	<b>/</b>						
Problem:	B I U S   플 ≔   ⊕ ⊕   ≡ = = =   ∞ ∞   ⊑ =   ↔ →   Q						
(public)							
	Format • Font • Size • <u>A</u> • <b>Δ</b> • <b>Ι</b> <sub>x</sub> O Source Ω % %						
Solution: (public)	B I U S   ≔ ≔   ≕ ≕ ⊨ = = = ■ ∞ ∞   ⊡ =   ← →   Q						
(Dubite)	Format • Font • Size • $\underline{A}$ • $\underline{A}$ • $\underline{I}_x$ $\underline{O}$ Source $\Omega$ % % $\underline{S}$						
EVO							

**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.

See also:

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.

See also:

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.

# 2.6.3 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.

AQ Journal:						
					1-3 of 3	S
FAQ#	TITLE	CATEGORY	ACTION	TIME		
49002	How to create a support bundle	Misc	Updated	11/18/2020 15:51:32 (Europe/Berlin)		
49002	How to create a support bundle	Misc	Created	11/18/2020 15:43:26 (Europe/Berlin)		
49001	Computer is dead	Misc	Created	11/18/2020 15:30:56 (Europe/Berlin)		

Fig. 2.141: FAQ Journal Screen

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 Save button.

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

#### 2.6.4 Language Management

Note: 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.

A FAQ Language Management					
Actions	List				
+ Add language	NAME				
	de en	₿ 10			

Fig. 2.142: FAQ Language Management Screen

#### 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.

Add Language		
* Name:		)
	Submit or Cancel	

Fig. 2.143: Add Language Screen

To edit a language:

- 1. Click on a language in the list of languages.
- 2. Modify the field.
- 3. Click on the Submit button.

To delete a language:

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

Edit Language			
	* Name:	en	)
		Submit or Cancel	



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

NAME DELETE de
de 🗊
en 🗎

#### Fig. 2.145: Delete Language Screen

#### 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.

#### 2.6.5 Category Management

**Note:** 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.

*	FAQ Category Management						
Actions		List					
+ Add category		NAME	VALIDITY	DELETE			
		Misc	valid	۵.			

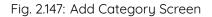
Fig. 2.146: FAQ Category Management Screen

#### 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.

Add Category	
* Name:	
Subcategory of:	
* Permission:	
	Agent groups that can access articles in this category.
Validity:	valid
* Comment:	
	Will be shown as comment in Explorer.
	Submit or Cancel



To edit a category:

- 1. Click on a category in the list of categories.
- 2. Modify the fields.
- 3. Click on the Submit button.

Edit Category	
* Name:	Misc
Subcategory of:	
* Permission:	admin x users x
	Agent groups that can access articles in this category.
Validity:	valid
* Comment:	Misc Comment
	Will be shown as comment in Explorer.
	Submit or Cancel

Fig. 2.148: Edit Category Screen

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.

List						
NAME	VALIDITY	DELETE				
Misc	valid	ŵ				

Fig. 2.149: Delete Category Screen

#### FAQ Category 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.
- **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.

#### 2.6.6 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.

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

#### 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.

r	Search		×
		Templates	
	Search template:		
		Create New	
		Filters in use	
	Fulltext:		
		Additional filters	
	Add another attribute:		
	Output:	Normal	
Ł		Q Run search	
		Fig. 2.150: Search Dialog	

	Search		×
		Templates	
	Search template:	Support x	
		Create New Delete	
		Filters in use	
	Fulltext:	Support	
		Additional filters	
	Add another attribute:		
	Output:	Normal	
L		Q Run search	4

Fig. 2.151: 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.

Search R	esult:							
Change sear	Change search options							
						1-1 of 1 S		
▲ FAQ#	TITLE	CATEGORY	LANGUAGE	STATE	VALIDITY	CHANGED		
49002 How to create a support bundle Misc en external (customer) valid 11/18/2020 15						11/18/2020 15:51 (Europe/Berlin)		
	49002 How to create a support bundle Misc en external (customer) valid 11/18/2020 15:51 (Europe/Berlin)							

Fig. 2.152: 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.

Warning: The template will be deleted immediately without confirmation!

#### 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  $\square$  button next to the field.

#### 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.

#### 2.6.7 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.

FAQ Misc How to create a support bundle	
Back   Edit   History   Print   Link   Delete To open links in the following description blocks, you might need to press Ctrl or Cmd or Shift key while clicking the link (depending on your browser and OS).	Keywords: support bundle generate
▼ Symptom (public) A support bundle needs to be created for the OTOBO system.	OTOBO State: external (customer) Validity: valid
<ul> <li>Problem (public)</li> <li>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.</li> </ul>	Language: en Flating: 0 out of 5 Votes: No votes found! Be the first one to rate this FAQ article. Created: 11/18/2020 15:43
<ul> <li>Solution (public)</li> <li>OTOBO 10:         <ol> <li>Switch to Admin -&gt; Support Data Collector</li> <li>Click "Generate Support Bundle"</li> <li>If the support bundle is needed for a ticket, please use the button Download.</li> </ol> </li> </ul>	(Europe/Berlin) (Super Admin) Changed: 11/18/2020 15:51 (Europe/Berlin) (Super Admin)
Comment (internal) See also <u>https://doc.otobo.org/manual/admin/stable/en/content/index.html</u>	Linked Objects Normal OBJECT# T:2015071510123456
Rating     How helpful was this article? Please give us your rating and help to improve the FAQ Database. Thank You! <u>not helpful</u>	

Fig. 2.153: FAQ Zoom Screen

#### 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.

#### 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.

#### See also:

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

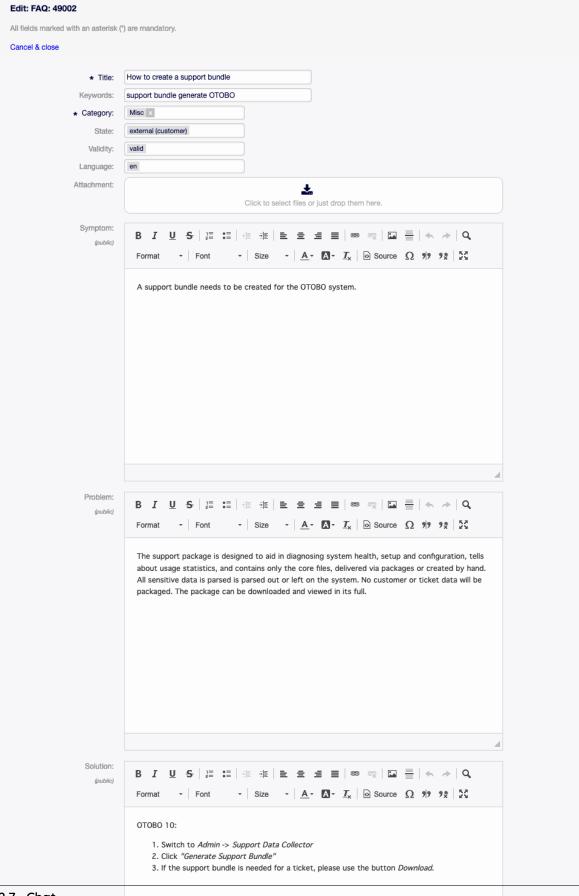
### 2.7 Chat

**Warning:** 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.

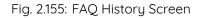
#### See also:

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

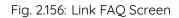
The chat feature allows for chats between agents and customers using the OTRS front end. Once enabled, customers or public users can start chats with agents and vice versa. Finished chats can be archived and attached to tickets, or can be downloaded as PDF by agents, customers and public users.



History of FAQ#: 49	0002 - How to create a support bundle		
Close			
History Content			
ACTION	USER	CREATETIME	
Created	sa (Super Admin)	11/18/2020 15:43:26 (Europe/Berlin)	
Updated	sa (Super Admin)	11/18/2020 15:51:32 (Europe/Berlin)	



Manage links for FAQ# 49002: How to create a	support bundle
Close this dialog	
Create new links Manage existing links	
Link with:	FAQ
FAQ#:	
Title:	
Fulltext:	
	Q Start search





FAQ Information	
Category:	Misc
Keywords:	support bundle generate OTOBO
State:	external (customer)
Validity:	valid
Language:	en
Rating:	0 out of 5
Votes:	No votes found! Be the first one to rate this FAQ article.
Created:	11/18/2020 15:43 (Europe/Berlin) (Super Admin)
Changed:	11/18/2020 15:51 (Europe/Berlin) (Super Admin)

Fig. 2.158: FAQ Information Widget

Linked Obj	ects	
Normal		
OBJECT#		
T:20150715	10123456	

Fig. 2.159: Linked Objects Widget

Linked: Ticket (1)						
TICKET#	TITLE	STATE	QUEUE	CREATED	LINKED AS	DELETE
2015071510123456	Welcome to OTOBO!	new	Raw	09/21/2020 17:08:29 (Europe/Berlin)	Normal	ŵ



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.

### 2.7.1 Manage Chats

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

#### See also:

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.

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.

#### Start New Chat

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

Manage Chats								
Hints	General Chat Reque	sts From Custo	omers					
Please note: This tab will be used by any	My Chat Channels	My Chat Channels All Chat Channels						
request which is related to chats. If you leave the chat manager (e.g. by using the navigation bar on top of the page), starting a new chat or other chat-related actions will possibly reload this tab any time. This means that it is recommended to leave the chat manager	CREATED	ТҮРЕ	CHANNEL	REQUESTER	DESCRIPTION	ACTION		
	There are currently no chat requests.							
	General Chat Requests From Public Users							
opened in this particular tab.	CREATED	TYPE	CHANNEL	REQUESTER	DESCRIPTION	ACTION		
	There are current	ly no chat req	uests.					
Chat Integration								
You can easily integrate the chat into a web	Personal Chat Requ	ests For You						
page. Just set up a few parameters and copy the integration code to your clip board.	CREATED	TYPE	CHANNEL	REQUESTER	DESCRIPTION	ACTION		
	There are current	ly no chat requ	uests.					
Configure Chat Integration								
	My Active Chats							

Fig. 2.161: Chat Management Screen

#### 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.

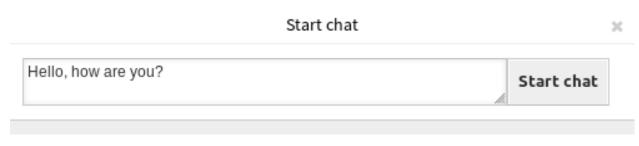
Logged-In Us	ers	
Agents (2)	Customers (0)	
🔵 Admin O	OTRS	
🔵 John Do	)e	2

Fig. 2.162: 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.
- 5. Wait for the answer. The other agent has to accept the chat request with the Open Chat link.
- 6. When the other agent accepts the chat request, you can chat now.

#### Agent to Customer User

To start a chat with a customer user:





JOHN DOE (A) (P)	- O ×
05/08/2019 14:39:08 (Europe/Budapest)	You Hello, how are you?
New Message (Shift + Enter for new line)	
New message (Sint + Enter for new line)	4

Fig. 2.164: My Active Chats Widget

Personal Chat Requests For	r You				
CREATED	TYPE	CHANNEL	REQUESTER	DESCRIPTION	ACTION
05/08/2019 12:21:22	User	Default channel	Admin OTRS	Hello, how are you?	Open chat

Fig. 2.165: Personal Chat Requests For You Widget

ADMIN OTRS (A) (I	P)	•	0	×
05/08/2019 12:40:07	Admin OTRS Hello, how are you? John Doe has joined this chat. You I'm fine, thank you!			
New Message (Shift +	Enter for new line)		4	1

Fig. 2.166: Agent to Agent Chat

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.

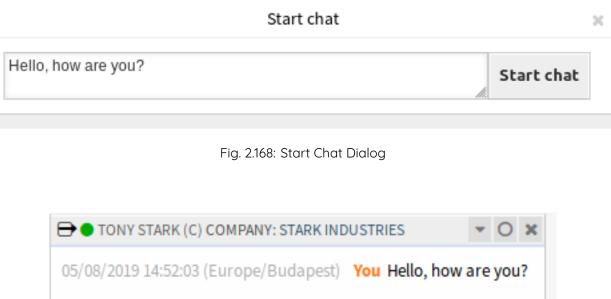


Fig. 2.167: Available Customer Users

#### See also:

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.
- 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.
- 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.



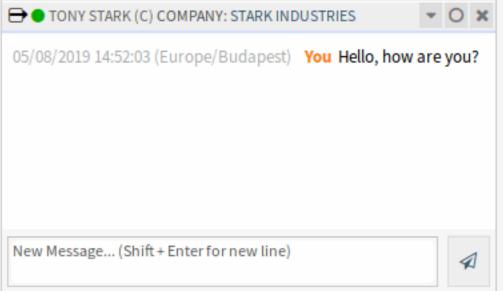
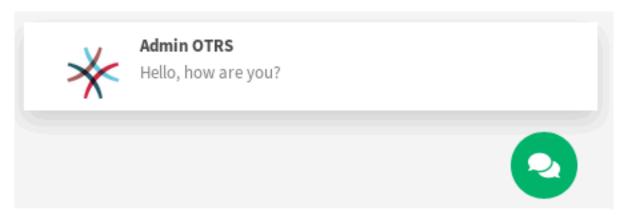
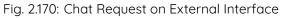
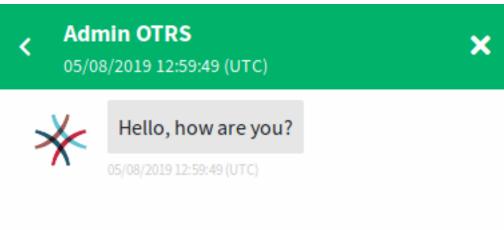


Fig. 2.169: My Active Chats Widget







## Tony Stark has joined this chat.

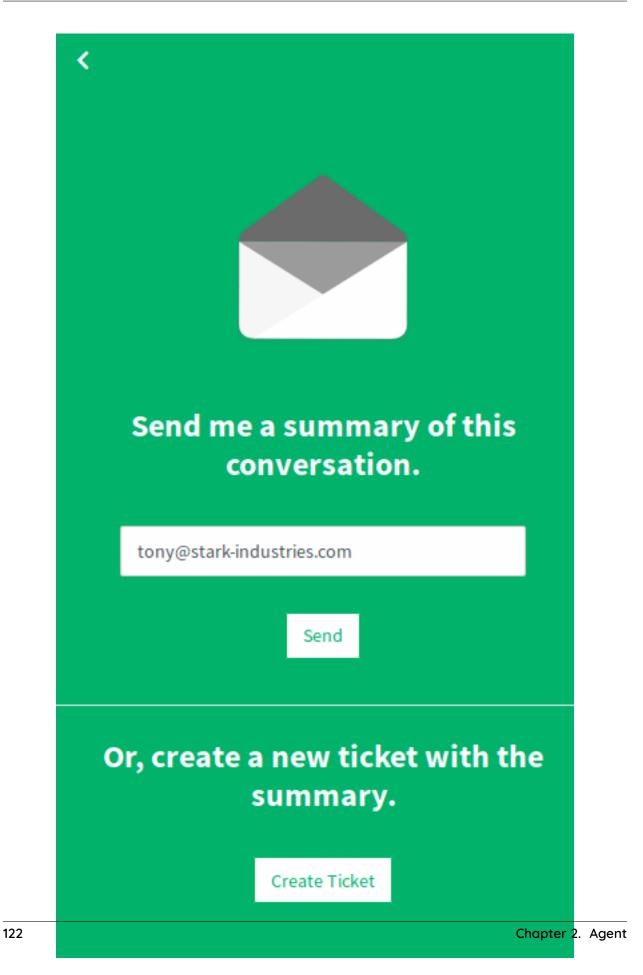
05/08/2019 12:59:59 (UTC)

# I'm fine, thank you!

05/08/2019 13:00:13 (UTC)

Write a message.

Fig. 2.171: Agent to Customer User Chat



#### **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:

1. A customer user clicked on the New conversation button within the chat window in the bottom right corner of the external interface.

< Chat Conve	ersation	×
	Tony Sta	ark has joined this chat. 05/08/2019 13:47:09 (UTC)
		I need some help! 05/08/2019 13:47:09 (UTC)
Please bear with us un chat request. Thank ye	-	nts is able to handle your ce.
Write a message.		1

#### Fig. 2.173: 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.

Chat Channels All Chat Channels					
EATED	TYPE	CHANNEL	REQUESTER	DESCRIPTION	ACTION
/08/2019 15:47:09 (Europe/Budapest)	Customer	Helpdesk	Tony Stark	I need some help!	Open cha
Fig. 2.174: Ge	neral Chat R	equests Fr	om Customer	rs Widget	
	Ch	nat preview			
hat protocol					
)5/08/2019 15:47:09 (Europe/Budar )5/08/2019 15:47:09 (Europe/Budar		-			
,, (					
hange chat channel Current chat channel: He	Indesk				
_	приезк				
Available channels:	· ~ 2				
Up	date Chann	el Acce	ot Cancel		
	Fig. 2.175: C	Chat Preview	w Dialog		
E OTONY STARK (C)	COMPANY:	STARK IND	OUSTRIES	- O 3	ĸ
00/00/2010 10.41.00	(Europe) b	ицарезу			
Tony Stark has joir	ned this cha	at.			
05/08/2019 15:47:09	(Europe/B	udapest)	Tony Star	'k	
I need some help!					
	(Europe/B	udapest)			
00/00/2019 10.40.01					
05/08/2019 15:48:51 Admin OTRS has id	nneu uns c				
Admin OTRS has jo			You		
	(Europe/B		You		

Fig. 2.176: Customer User to Agent Chat

#### 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.

<	Chat Conversation X
	Jane Smith has joined this chat. 05/08/2019 14:00:27 (UTC)
	Can you tell me some details about the service?
	05/08/2019 14:00:27 (UTC)
	se bear with us until one of our agents is able to handle your request. Thank you for your patience.
	4

Fig. 2.177: Start Chat Window

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.

#### 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.

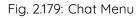
General Chat Requests From Public	Users				
CREATED	TYPE	CHANNEL	REQUESTER	DESCRIPTION	ACTION
05/08/2019 16:00:27 (Europe/Budapest)	Public	Helpdesk	Jane Smith	Can you tell me some details about the service?	Open chat

Fig. 2.178: General Chat Requests From Public Users Widget

- 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.

🕀 🌒 JANE SMI	TH (P)				<b>▲</b> ○ <b>×</b>
Phone ticket	Append	Invite	Channel change	Download	New window
				01	VNER HELPDESK
Can you tell m	ie some det	ails abou	t the service?		
05/08/2019 16	02:07 (Euro	pe/Buda	pest) Admin OTR	S has joined tl	his chat.
New Message	. (Shift + Ente	erfornew	line)		1



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 threeway 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.

#### **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.

**Note:** 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.

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

с	hat Integration
	snippets from here. If you would like to make any adaptations, please switch to the ou can make your changes and copy the snippet to your clip board afterwards. Please
Configuration Integration Code Preview	
	General Settings
Pre-selected channel:	
Primary color of the chat design:	•
	Texts
Chat conversations title:	Conversation(s)
No chat conversations:	You are not participating in a chat at the moment.
New conversation link:	New conversation
Incoming chat requests title:	Incoming chat request(s)
Outgoing chat requests title:	Outgoing chat request(s)
С	lose this dialog

Fig. 2.180: Chat Integration – Configuration

Chat Integration	3
You can easily integrate the public chat into a website. Just copy the code snippets from here. If you would like to make any adaptations, please switch to the configuration tab. All changes are applied immediately to the snippet, so you can make your changes and copy the snippet to your clip board afterwards. Please note that changes made on this page are not remembered.	
Configuration Integration Code Preview	
Integration Code	
Integrate this into the bottom of your page:	
Close this dialog	

Fig. 2.181: Chat Integration – Integration Code

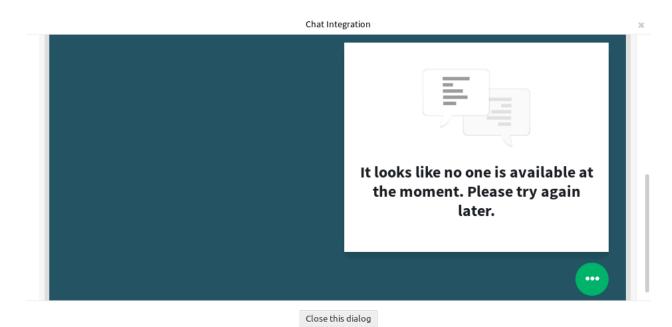


Fig. 2.182: Chat Integration – Preview

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.

### 2.8 Reports

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

#### 2.8.1 Reports

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.

Report Management				
Actions	Statistics Reports			
Add Report	NAME	DESCRIPTION	DELETE	RUN
	Daily Report	This report collects all information needed for daily work.	Û	Run now

Fig. 2.183: Reports Overview Screen

#### 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.

Add Report	
<ul><li>* Name:</li><li>* Description:</li></ul>	
★ Valid:	valid Save or Cancel

Fig. 2.184: 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.

#### **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.

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
- 11	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:	
28atiReports	13

Add statistic to report:

131

Settings	
Name:	Daily Report
Statistics:	New Tickets
	E Run now or Cancel

Fig. 2.186: View Report Screen

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.

#### **Automatic Generation Settings**

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

#### See also:

For more information see the Cron article on Wikipedia.

Note: 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).

#### 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.

#### **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.

#### 2.8.2 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.

ctions	Statistics					
+ Add Statistics					1	1-11 of 1
	▲ STAT#	TITLE	OBJECT	EXPORT	DELETE	RUN
Import Statistics	10001	Changes of status in a monthly overview	StateAction	*	Û	Þ
	10002	List of tickets closed last month	Ticketlist	±	Û	Þ
	10003	List of open tickets, sorted by time left until response deadline expires	Ticketlist	¥	Û	Þ
	10004	New Tickets	TicketAccumulation	*	Û	Þ
	10005	List of open tickets, sorted by time left until solution deadline expires	Ticketlist	*	Û	Þ
	10006	List of tickets closed, sorted by response time.	Ticketlist	*	Û	Þ
	10007	List of open tickets, sorted by time left until escalation deadline expires	Ticketlist	¥	Û	Þ
	10008	Overview about all tickets in the system	TicketAccumulation	*	Û	Þ
	10009	List of tickets created last month	Ticketlist	*	Û	Þ
	10010	List of tickets closed, sorted by solution time	Ticketlist	*	Û	Þ
	10011	List of the most time-consuming tickets	Ticketlist	*	Û	Þ

Fig. 2.187: Statistics Overview Screen

#### **Manage Statistics**

Three type of statistics are available in OTOBO.

Add Statistics		
Dynamic Matrix Each cell contains a singular dat	Dynamic List	Static Non-configurable complex statis
Lach ceil contains a singular dat	Lach fow contains data of one e	Non-completable complex statis

Fig. 2.188: Add Statistics Screen

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.

General Specification	
* Title:	
* Description:	
* Object type:	Ticketlist
* Permissions:	stats ×
	You can select one or more groups to define access for different agents.
* Result formats:	CSV x Excel x Print x
* Time Zone:	
	The selected time periods in the statistic are time zone neutral.
Create summation row:	No Generate an additional row containing sums for all data rows.
Create summation column:	·
oroate summation column.	Generate an additional column containing sums for all data columns.
Validity:	valid
	If set to invalid end users can not generate the stat.

Fig. 2.189: 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.

<ul> <li>General Specification</li> </ul>	
* Title:	New Tickets
* Description:	Total number of new tickets per day and queue which have been created during the last month.
* Permissions:	stats x
	You can select one or more groups to define access for different agents.
* Result formats:	CSV × Excel × Graph: Bar Chart × and 3 more ④
* Time Zone:	Europe/Berlin
	The selected time periods in the statistic are time zone neutral.
Create summation row:	Yes
	Generate an additional row containing sums for all data rows.
Create summation column:	Yes
	Generate an additional column containing sums for all data columns.
Cache results:	Yes
	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:	No
	Provide the statistic as a widget that agents can activate in their dashboard. Please note that enabling the dashboard widget will activate caching for this statistic in the dashboard.
Validity:	valid
	If set to invalid end users can not generate the stat.

Fig. 2.190: Edit General Specification Section

To import statistics:

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

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.

Import Statistics Configuration		
	File: Durchsuchen Keine Datei ausgewählt.	
	Import or Cancel	

Fig. 2.191: Import Statistics Configuration Screen

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.

Settings	
Object:	TicketAccumulation
Description:	Total number of new tickets per day and queue which have been created during the last month.
Format:	CSV
Time Zone:	UTC
	The selected time periods in the statistic are time zone neutral.
	X-axis
Create Time:	The past complete 1 and the current+upcoming complete 0 month(s)
	Scale: 1 day(s)
	Y-axis
Queue:	Junk, Misc, Postmaster, Raw
	Filter
	No element selected.
	Run now or Cancel

Fig. 2.192: View Statistics Screen

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.



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

#### **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.

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.

Note: 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.

#### **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.

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.

### 2.9 Admin

This menu item opens the administrator interface, which is described very detailed in the Administration Manual.

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

### 2.10 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.

#### 2.10.1 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.

Search		×
	Templates	
Search template:		
	Create New	
	Filters in use	
Fulltext:		
	Additional filters	
Add another attribute:		
Output:	Normal	
	Q Run search	1

Fig. 2.194: Search Dialog

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

Sea	rch R	esults:									
Cha	nge sear	rch options	s (last-search)								•
Bulk										1-2	of 2 S M L
			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. 2.195: 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.

#### **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\*).

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

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

#### See also:

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

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

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

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

**Proximity** 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: + - = && || > < ! ( ) { } [ ] ^ " ~ \* ? :  $\setminus$  /.

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

#### See also:

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

### 2.11 Accessibility

OTOBO offers a high contrast skin for better accessibility. You can activate it in your Personal Preferences.

# Chapter $\overline{\mathbf{3}}$

### Customer user

In this section you can find information if you are working as a customer user in OTOBO.

### 3.1 Avatar actions

By hovering over the Avatar you can either ../avatar/logout or change your ../avatar/personal-preferences.

#### 3.1.1 Personal Preferences

Use this screen to set personal preferences in OTOBO. All settings changed on this site affect only your profile, and does not affect the behavior of OTOBO for other users.

#### Skin

Here you can change the skin of your OTOBO interface.

Skin Select your preferred layout fo	or the software.		
SkinDefault			
Update			

#### Fig. 3.1: Skin selection

Select a skin from the drop-down list.

#### Change password

Here you can change your current password. To change the password, all fields must be filled.

Change password iet a new password by filling in your current password and a new one.	
Current password	
New password	
Verify password	
Update	

Fig. 3.2: Change Password

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

New password Type your new password here.

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

#### Interface language

Here you can change the language of your OTOBO interface.

Interface language Select the main interface language.
English (United Kingdom)
Update

Fig. 3.3: Language selection

Only those languages are listed by default, in which OTOBO is translated more than 95%.

#### Time Zone

Here you can change the timezone to match your current location to get proper date and time calculation in OTOBO.

Select the location where you are currently in.

#### Ticket overview

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

Select a refresh interval from the drop-down list.

Time Zone			
Select your personal time zone. All times	will be displayed relative to this time zone.		
Time Zone			
Europe/Berlin			
Update			
	Fig. 3.4: Time Z	Lone selection	
	Ū.		
Ticket overview			
Ticket overview Select after which period ticket overview:	should refresh automatically.		
Select after which period ticket overviews	should refresh automatically.		
Select after which period ticket overviews	; should refresh automatically. 		
Select after which period ticket overviews	; should refresh automatically. 		

#### Fig. 3.5: Overview Refresh Time

**Warning:** Refreshing the overview screens too often can cause performance issues on large systems with many users.

#### Number of displayed tickets

Here you can select how many tickets should be shown by default.

Select how many tickets should b	e shown in overviews by default.		
Tickets per page			
Update			

Fig. 3.6: Number of displayed tickets

Select a refresh interval from the drop-down list.

#### 3.1.2 Logout

Use the logout icon to leave OTOBO and go to the login screen.

Note: Clicking on logout icon will logout the user without confirmation.



Fig. 3.7: Logout

### 3.2 Accessibility

OTOBO offers a high contrast skin for better accessibility. You can activate it in your Personal Preferences.

# CHAPTER 4

### **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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