Documentation

Manual do OTRS Business Solution™ 6

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O código fonte deste documento encontra-se em t github, in the repository doc-otrsbusiness. As contribuições são bem-vindas. Você pode auxiliar traduzindo-a para o seu idioma em Transifex.

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Chapter 1. Introdução

Com o **OTRS Business Solution**™ você pode desfrutar de tos os benefícios dos serviços profissionais empresariais exclusivos e recursos oferecidos pelo grupo OTRS. Otimize seu internal & comunicação externa para obter mais qualidade de serviço - flexibilidade operacional ajustável ao seu cenário.

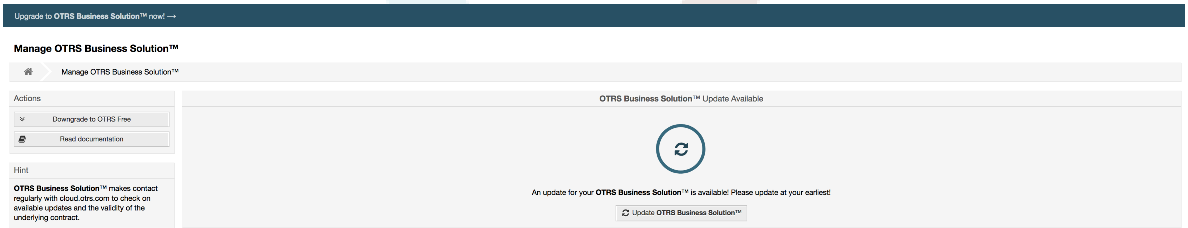
O elegante e rápido sistema da OTRS 6 é a base para a **OTRS Business Solution**™. Na parte superior estão disponíveis para você um exclusivo conjunto de recursos. Estas incluem além disso o os serviços em nuvem integrada do **OTRS Business Solution**™ Você pode ter flexibilidade para ativar ou desativar as funções e implantação dos seus cenários.

Além disso, você escolhe entre 3, 7 ou de diferentes de um número ilimitado selecionado livremente **OTRS Business Solution**™ Característica - dependendo do nível do contrato, regular também sem fins lucrativos com atualização gratuita , OTRS o melhor em segurança e apoio, bem como instalação e configuração efetuadas pelos nossos clientes.

Chapter 2. Atualizando para OTRS Business Solution™

Ordem para atualizar para **OTRS Business Solution**™, você precisa de um contrato válido com o grupo OTRS. Se você tem um contrato, cocê pode atualizar para **OTRS Business Solution**™ by visiting the **OTRS Business Solution**™ Tela da administração do seu exemplo OTRS. Você pode encontrar o link para esta tela em *Sistema de administração* parte da área administrativa é exemplo OTRS gratis. Por favor, note que primeiro é necessário registrar o seu sistema usando o mecanismo do sistema de registro.

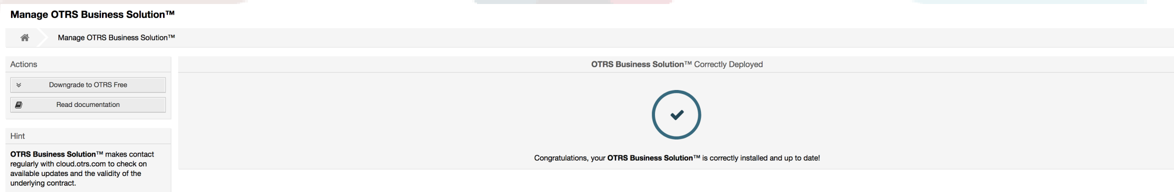
Figure 2.1. Tela de atualização



Se você tem o direito de atualizar, você (como um administrador) Observe também uma barra de notificações que o direciona para a tela de atualização. A atualização é feita automaticamente, para isso pressione apenas o botão atualizar. Por favor, note que você não precisa confirmar novamente a atualização. Pressionando o botão atualizar imediatamente inicia o processo de aprimoramento.

Se a atualização foi bem sucedida, você verifica uma confirmação sobre a **OTRS Business Solution**™ tela da administração.

Figure 2.2. Atualização bem sucedida



Se você tem questões sobre seu direito à **OTRS Business Solution**™, ou questões técnicas, por favor escreva a sales@otrs.com.

Chapter 3. Características da OTRS Business Solution™

1. O Chat

1.1. Descrição

O recurso do chat de **OTRS Business Solution**™ permite o chat entre os agentes e os clientes usando o OTRS frontend. Uma vez ativados, os clientes (ou usuários) pode iniciar o chat com os agentes e vice-versa. Terminando os chats, podem ser arquivados e conectando com os tickets, ou pode ser baixado em formato PDF pelos agentes, clientes e usuários.

Cada chat é atribuído a um canal de chats. Canal de chat é como uma sala de chat. Cada canal de chat é atribuído um determinado grupo que controla as permissões para este canal. Se o canal de chat não é selecionado quando criado, este chat é criado em um canal padrão (Se não existir é criado automaticamente).

1.2. Configuração

As seguintes configurações do sistema são relevantes para esse recurso. Por favor note que você também pode definir uma lista de textos que estão sendo exibidos para usuários e clientes no modulo de chat. Para obter mais informações sobre textos que podem ser alterados, por favor observe o módulo de configuração (`OTRSBusiness → Core::Chat`).

`ChatEngine::Active`

Controla-se ou não o recurso de chat ativado.

`ChatEngine::ChatDirection::PublicToAgent`

Controla-se ou não os usuários capazes de iniciar o chat (por favor note que a configuração frontend do módulo para usuários do chat frontend `PublicFrontend::Module###PublicChat` também apresenta ser ativada).

`ChatEngine::ChatDirection::CustomerToAgent`

Controla-se ou não os usuários capazes de iniciar o chat (por favor note que a configuração frontend do módulo para clientes do chat frontend em `CustomerFrontend::Module###CustomerChat` também apresenta ser ativada).

`ChatEngine::ChatDirection::AgentToCustomer`

Controla-se ou não os agentes capazes de iniciar o chat diretamente com clientes.

`ChatEngine::ChatDirection::AgentToAgent`

Controla-se ou não os agentes capazes de iniciar o chat, um com os outros.

`ChatEngine::PermissionGroup::ChatReceivingAgents`, `ChatEngine::PermissionGroup::ChatNotificationAgents`, `ChatEngine::PermissionGroup::ChatStartingAgents`

Definir os grupos para determinadas funções. Recebimentos: Os grupos podem receber e aceitar solicitações no chat. Notificações: Os grupos podem receber notificações sobre novas/solicitações de chat pendentes. Iniciando: Os grupos estão autorizados para iniciar novos chats com todos .

`ChatEngine::DefaultAgentName`

Um nome padrão que deve ser exibido para os clientes e usuários em lugar do nome verdadeiro do agente de chatting. Se estiver vazio ou desativado, o verdadeiro nome do agente será mostrado.

`ChatEngine::DefaultAgentNameNumbers`

Controla-se os números que não devem ser adicionados aos agentes, nome padrão no caso de mais de um agente que está em um chat para permitir que os clientes/usuários para distinguir entre os diferentes agentes (por exemplo " Agente de suporte 1 ", Agente de suporte 2", etc).

`ChatEngine::PublicInterface::AllowChatChannels`

Define-se canal de chat, uma seleção ativa de usuários. Se definido como "não", os usuários do chat vão para o canal padrão automaticamente (ChatEngine::Default-ChatChannel).

`ChatEngine::PublicInterface::AvailabilityCheck`

Define-se os canais de chat que devem ser selecionáveis pelo menos na interface pública por um agente compermissões suficientes está disponível neste canal.

`ChatEngine::CustomerInterface::AllowChatChannels`

Defines, if chat channel selection should be enabled for customer users. If set to "no", chats from customer users will go to the default channel automatically (`ChatEngine::DefaultChatChannel`).

`ChatEngine::CustomerInterface::AvailabilityCheck`

Define-se os canais de chat que devem ser selecionáveis pelo menos na interface do cliente por uma agente permissão suficiente está disponível neste canal.

`ChatEngine::CustomerThreshold`

Amount of minutes which need to pass before a *no agent is available* message is being displayed to the customer/public user who started the chat request. The message can be configured using `ChatEngine::Texts::CustomerFrontend::NoAgentsAvailable::NewTicket` or `ChatEngine::Texts::CustomerFrontend::NoAgentsAvailable::AddToExisiting` (customer interface) and `ChatEngine::Texts::PublicFrontend::NoAgentsAvailable` (public interface).

`ChatEngine::AgentOnlineThreshold`

If an agent is not active in OTRS within this threshold, they will be automatically set to *unavailable for chat* (see Agents: Set up availability).

`ChatEngine::DefaultChatChannel`

Nome do canal de chat padrão. Este canal não deve ser criado manualmente e não pode ser excluída. este canal é tomado como alvo no canal de chat, em caso de seleção de canal de chat está desativado para qualquer interface.

`ChatEngine::ChatTTL`

Depois de muitas horas o chat deve ser fechado e excluído do banco de dados. O chats fechados podem ainda ser visualizados e baixados pelos clientes. Depois que o chat for excluído do banco de dados, deixará de ser possível a visualização ou download para o cliente.

`ChatEngine::ChatDecayTime`

Depois de muitos dias os chats não fechados, devem ser excluídos do banco de dados automaticamente, a fim de manter o banco de dados limpos. Por favor, note que esta definição pode eventualmente excluir um chat que ainda está em uso, se forem mais antigos, que a quantidade de dias configurado.

`ChatEngine::ChatOrder`

Define-se os novos chats que devem ser anexado ou desanexado a lista ativa dos chats dos chats widget ativos no gerenciador de chat.

1.3. Setup

A fim de ser capaz de criar o seu primeiro chat, você precisa configurar determinados instrumentos em sua instância no OTRS.

1.3.1. Administrar: Criar canais de chat e atribuir permissões

In the admin area in OTRS, you'll find a new entry *Chat Channel* (`AdminChatChannel`). Use this screen to add new channels. You'll need to assign an existing agent group to each channel you'll create. You can use the screens *Agents* ↔ *Groups* or *Agents* ↔ *Roles* to assign permissions. There are new chat-specific permissions which are described below.

Chat com permissões disponíveis

`CHAT_OBSERVER`

Os usuários com este tipo de permissão serão capazes de observar os chats neste canal após serem convidados. Eles não serão capazes de aceitar ou observar os chats neste canal, cliente/usuário não será capaz de criar um novo chat neste canal. Os observadores não podem convidar ainda outros agentes a um chat e observar atualmente.

`CHAT_PARTICIPANT`

Os usuários com este tipo de permissão será capaz de tomar parte de um chat, mas só depois de convidados. Depois estão no chat, eles podem alterar ou descartar o canal de chat etc.. Eles não serão capazes de aceitar um cliente/usuário do chat na sua própria solicitação.

`CHAT_OWNER`

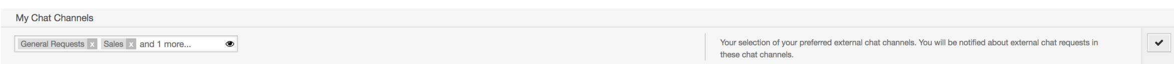
Os utilizadores com este tipo de permissão serão capazes de aceitar clientes de chat/pedidos do público e fazer todos os tipos de observador e participante de ações de um chat.

Note

To use the chat in general, agents still need to have at least ro permissions to the groups set up in `ChatEngine::PermissionGroup::ChatReceivingAgents` and `ChatEngine::PermissionGroup::ChatStartingAgents`.

1.3.2. Agentes: selecionar canais de chat ativos

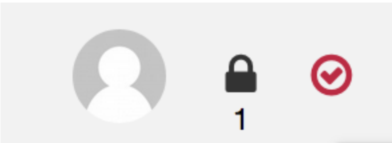
Figure 3.1. Criando canais de chat preferidos



Como um agente, você precisará selecionar os canais de chat que você deseja está disponível. Os clientes serão capazes de criar uma solicitação de chat em um determinado canal, ao menos que um agente com permissão do proprietário escolher este canal em sua preferencias, definido como disponível para o chat externo (Visualizar a seção seguinte).

1.3.3. Agentes: configurar a disponibilidade

Figure 3.2. Configurando a disponibilidade do chat



Estar disponível para qualquer chat, você precisará utilizar um interruptor de uma barra de ferramentas de chat. É um interruptor de três vias com estes estados: indisponível para chat (círculo vazio), disponível para interno (agente para agente) chats (círculo vazio com sinal), disponível para interno e externo (cliente para agente, público para agente) chats(círculo preenchido com sinal). Basta clicar o botão do pedido para alterar sua disponibilidade.

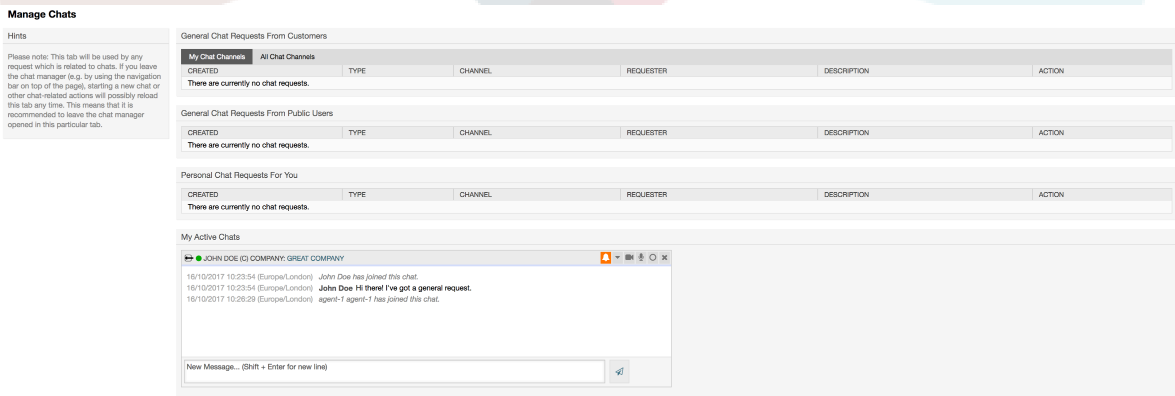
Note

Your availability will be reset to *internal chats only* each time you log in to OTRS again.

1.4. Uso geral

1.4.1. O gerente do chat

Figure 3.3. Gerenciando o chat



The chat manager is the central point of the chat feature. As an agent, here you can manage your chats and see and accept open requests. The chat manager provides a list of chat requests from customers, public users and other agents, as well as an overview over all active chats. Open the chat manager by using *Chat* in the main navigation of OTRS.

1.4.2. Iniciando novos chats

- *Agente para agente*

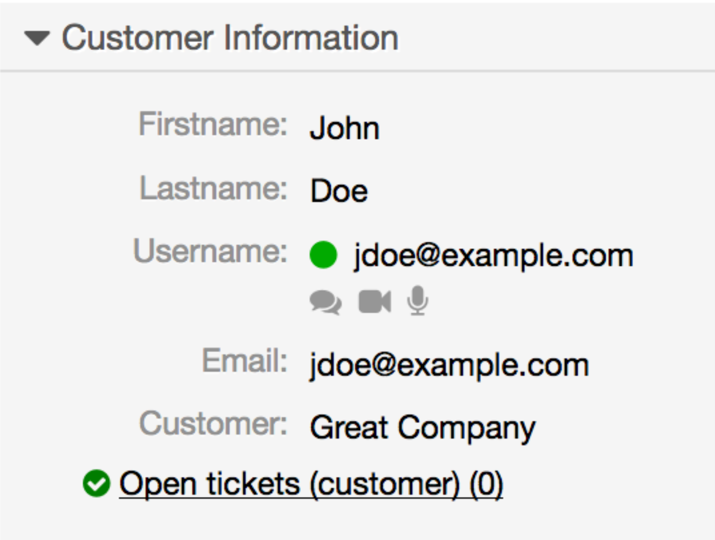
  Para iniciar um chat com outro agente, você pode usar o widget online do painel. Os agentes que são capazes de utilizar o chat, terá um ícone com o seu nome no chat que você pode clicar. Uma vez clicando, o chat será aberto de uma forma que você pode utilizar para inserir a sua primeira mensagem no chat para este agente. Após o envio da solicitação do chat para outro agente, o mesmo pode visualizar o chat no gerenciador do chat.

- *Agente para o cliente*

  Para iniciar um chat com um cliente, você pode utilizar o centro de informações de cliente widget, visualizando um determinado cliente. Os clientes online terão um ícone no chat com o seu nome que você pode clicar. Uma vez clicado, um chat será aberto que você pode utilizar para inserir a sua primeira mensagem no chat para este cliente. Após a solicitação do chat for enviada para o cliente, você pode assistir o chat, do gerenciador de chat.

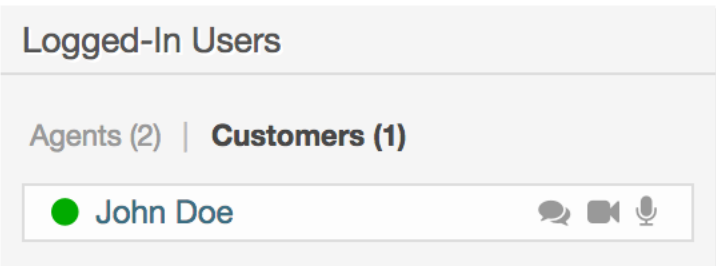
  Another possibility is to create a chat from the ticket zoom. If the customer user who is selected in this ticket is currently online, you'll be able to use a chat icon next to their username in the customer information box in right sidebar (see figure below).

  Figure 3.4. Inicializando um ticket do chat A2C

  Additionally, you will be able to start chat with customer users by clicking on chat icons next to their name in the user online widget on the dashboard.

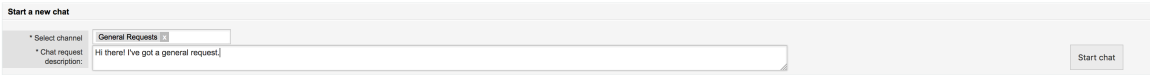
  Figure 3.5. Starting an A2C chat from dashboard

- *Cliente para o agente*

  Customers are not able to start a chat directly with a certain agent, but only to create generic chat requests. To do this, customers can use the item *Chats* → *Create new chat* from the customer interface main navigation.

Figure 3.6. Iniciando um chat C2A



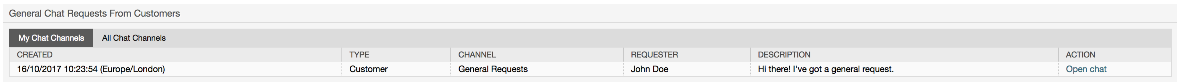
- *Público para o agente*

  Users of the public interface are also not able to start a chat directly with a certain agent, but only to create generic chat requests using the public chat module (`public.pl?Action=PublicChat`). If you would like to integrate the public chat module into your website, you can use the IsIframe parameter. The OTRS header and footer will then be removed from the view (`public.pl?Action=PublicChat;IsIframe=1`).

1.4.3. Negociar as solicitações no chat

Se houver uma nova solicitação de chat em um dos canais que você (Como um agente) tem permissões que você receberá uma notificação do navegador que permite que você encaminhe diretamente para o gerenciador de chat. Depois que você abrir o gerenciador de chat, você pode visualizar a lista de todas as solicitações em aberto (veja a figura abaixo).

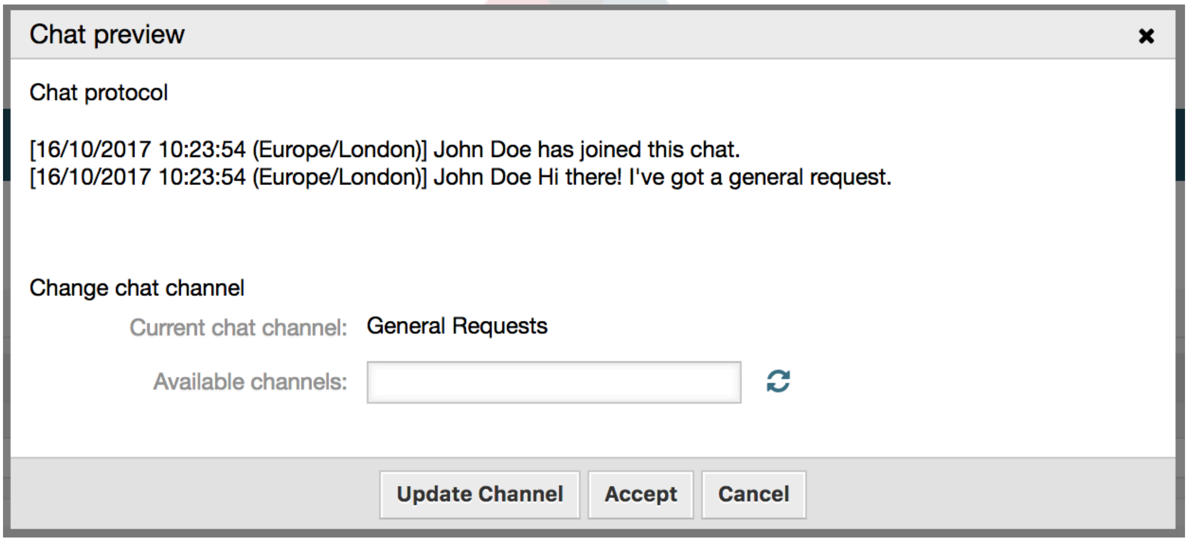
Figure 3.7. Abrir uma solicitação no chat



Use the *Open chat* button from the list to see the details of the request. Clicking the button will open an overlay which provides several actions on this request. Given that you've got sufficient permissions, you can accept the request or change the channel for this request. Changing the channel will follow the same rules as creating new request: you can only move the request to a channel which has active agents in it.

Mudando o canal de chat utilizado sem aceitar o pedido, poderia ser enviado os chats por exemplo para o departamento correto.

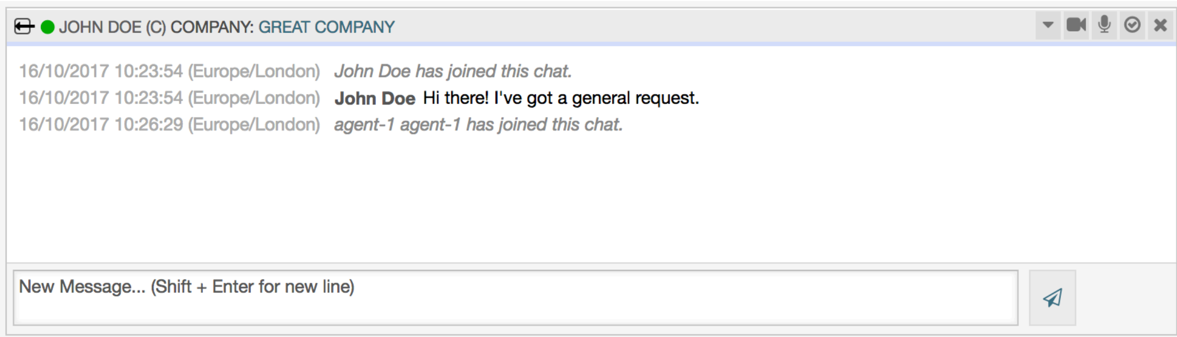
Figure 3.8. Abrir e especificar solicitação no chat



If you want to enter a chat, you can use the *Accept* button from the chat detail overlay box. The chat will then be removed from the list of requests, added to the list of your active chats and the customer/public user will receive a message that you've entered the chat.

1.4.4. O Chat Widget

Figure 3.9. O chat widget



O chat widget é o componente principal que utilizará com outras pessoas no chatting. Ele Fornece um histórico de todas as mensagens no chat, bem como uma lista de ações possíveis (dependendo do nível da permissão).

Para enviar mensagens, você pode utilizar o campo de texto do chat widget na sua lista ativa no chat. Uma vez, que você terminar de escrever sua mensagem e apresentá-lo, clicando no ícone enviar, ao lado do campo de texto ou utilizando o espaço e introduzindo (consecutivamente). Quando a mensagem foi enviada, o cursor encaminha para o campo do texto, permite que continue a digitar facilmente.

Você encontrará seguindo uma lista de possíveis ações no chat widget.

- *Ação: Monitor & fechado*

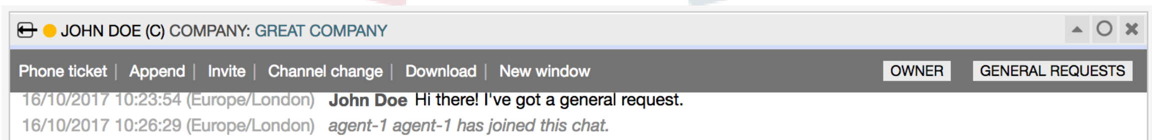
  A partir do chat widget que encabeça o lado superior, você pode fechar o chat clicando no ícone "x". Clicando o ícone do círculo à direita, próximo ao ícone de fechar, permite que você configure com um acompanhamento pessoal ao chat, que é novamente um interruptor de três vias (sem monitorização = círculo vazio, apenas o monitor de atividades do cliente = círculo vazio com ícone tick, monitorar todas as ações = círculo preenchido com ícone tick). Quando o monitoramento de um chat, irá mostrar as notificações do navegador a cada uma nova ação neste chat.

  A partir da plataforma, você também pode expandir a barra de ferramentas avançada do chat, utilizando ícone de ação de triangulo. A barra de ferramentas mostra também um lugar no canal de chat que tem você neste chat. (por exemplo o proprietário).

  ### Figure 3.10. Monitorar um chat

  ### Figure 3.11. Ações avançadas do chat

- *Ação: Telefone e ticket*

  Using the *Phone ticket* link from the advanced toolbar, allows you to create a phone ticket to which the current chat will be appended to as an article. After you've successfully created the ticket, the chat will get closed automatically.

- *Ação: anexar*

  Permite anexar esse chat como um artigo para um ticket selecionado. Depois que o artigo foi criado, o chat ficará fechado automaticamente.

- *Ação: convidar*

  Allows you to invite another agent to this chat. You can select from a list of available agents who you want to invite. Once you've invited the agent, a new agent-to-agent chat request will be sent to this agent. After the request has 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.

- *Ação: Mudança de canal*

  Utilizando este link, você pode alterar o canal para este chat. Para a seleção do canal alvo se aplicam as mesmas regras para selecionar um canal de chat inicialmente.

- *Ação: Download*

  Permite o download do histórico completo como PDF desse chat.

- *Ação: Nova janela*

  Este chat abe uma janela popup separada. Você pode usar esta janela da mesma forma como no chat widget e tanto o widget e o popup pode ser usado ao mesmo tempo.

- *Ação: Observador*

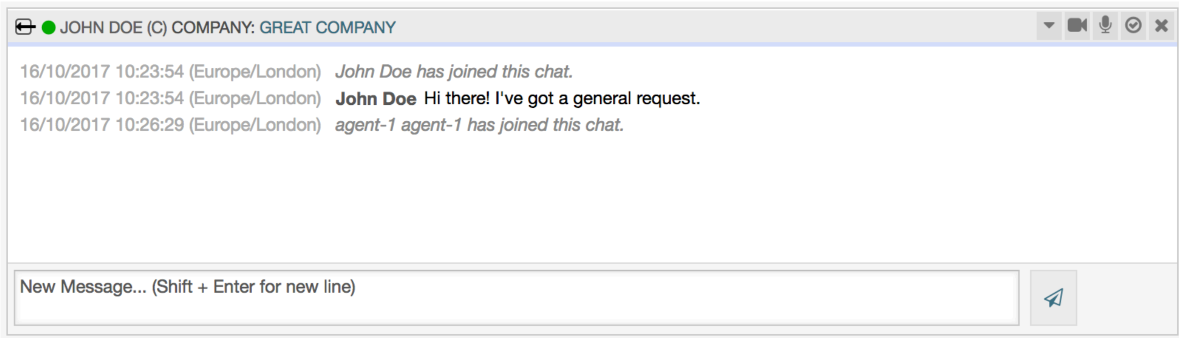
  Quando você foi convidado para um chat com outro agente, você pode decidir se deseja participar no chat com um observador ou participante (dependendo o seu nível de permissão). Uma vez que você clique na ação a partir de seu barra de ferramenta, um novo chat widget será adicionado a lista de seus chats ativos que é o chat para as quais você foi convidado. Se você participar no chat como observador, você será capaz de ler o que os outros estão contribuindo para o chat e você será invisível para os clientes e outros usuários. Os agentes receberão ainda uma mensagem que você entrou no chat como observador. Como observador, você tem a possibilidade de se tornar um participante a qualquer momento, utilizando a ação de ferramenta avançada em seu chat widget. (dependendo do nível de sua permissão).

- *Ação: Participante*

  Se você deseja contribuir de alguma forma para o chat, para as quais você foi convidado, você pode ingressar como participante. Os clientes/usuários e os agentes receberão uma mensagem que você inseriu no chat. Como participante, você pode se tornar um observador a qualquer momento utilizando a ação de ferramentas avançadas em seu chat widget.

1.4.5. User availability

Figure 3.12. O chat widget



Every chat participant has colored icon (circle) before his/her name in the *Chat widget* header, which represents participant availability. Icon color represents participant state as follows:

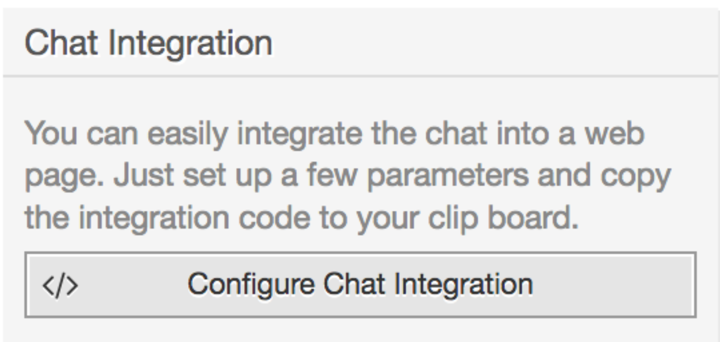
- *Active* - participant is active (available and online).
- *Away* - participant is away (available, but there was no request sent to the server from this user for some time - default 5 minutes, see ChatEngine::AgentOnlineThreshold).
- *Inactive* - participant is inactive (chat request is not accepted yet or participant left the chat).
- *Unavailable* - participant is unavailable (set via *Availability* button).
- *Offline* - participant has logout or session has expired.

1.5. Advanced Usage

1.5.1. Chat Integration in Web Pages

You can easily integrate the public chat into a website. In the chat manager, administrators can access a button to open public chat integration configuration and snippet generator.

Figure 3.13. Configure Chat Integration Button



1.5.1.1. Configuração

Configuration tab contains several parameters that can be tweaked to suit your needs. While most of them are self-explanatory, *General Settings* section contains several important options:

Display Chat if no agent is available

If enabled, this option controls whether the chat will be displayed regardless of agent's presence in the system. If not enabled, if there are no agents currently online and available for chat, widget will be hidden.

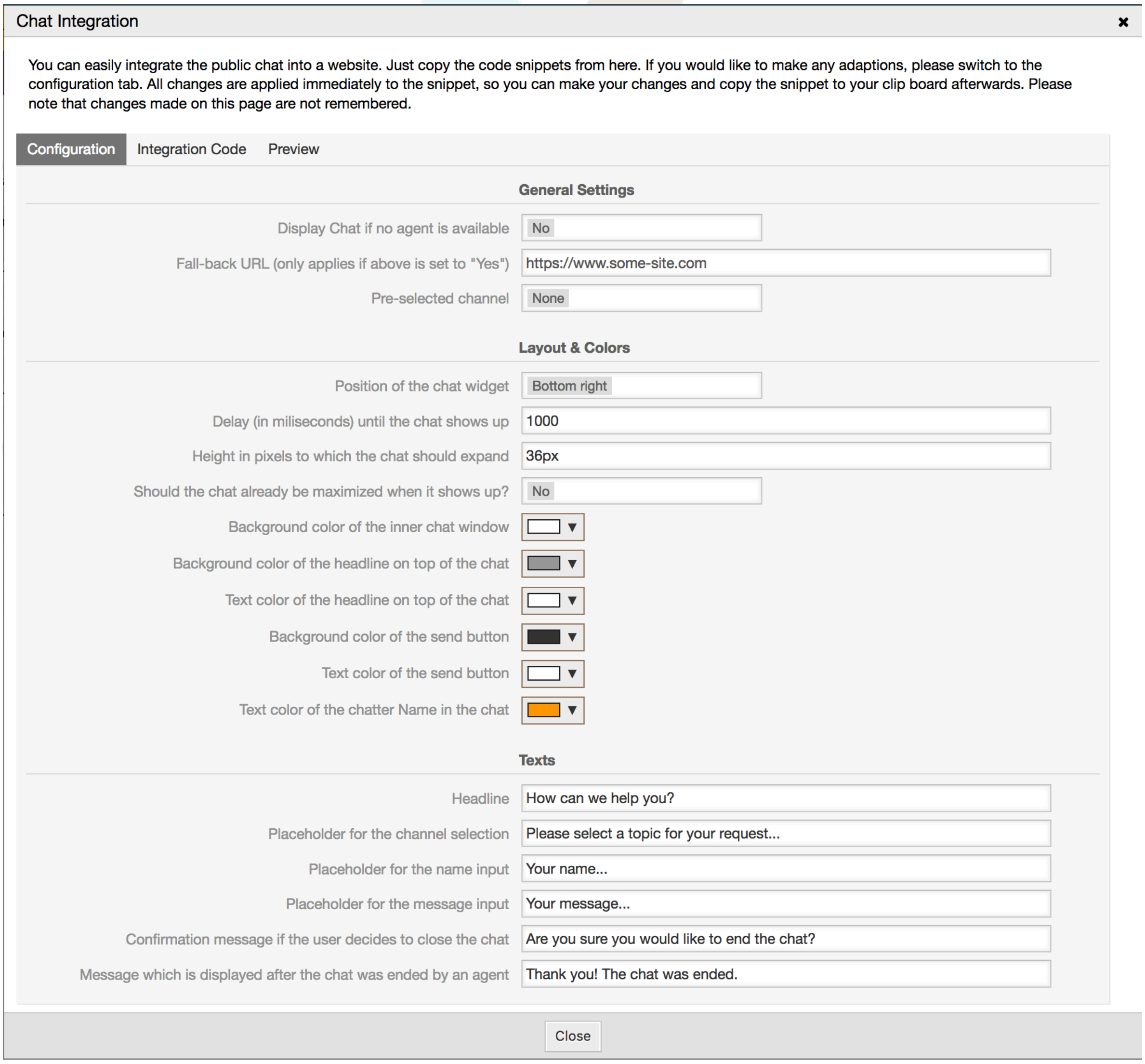
Fall-back URL

This option is taken into account only if above option is enabled. If there are no agents present and after some time, users of the public chat will be presented with a message containing this link.

Canal pré-selecionado

Default chat channel selection for public chat requests. This chat channel will be pre-selected in the chat widget, but users will be able to change it if needed.

Figure 3.14. Configuration Tab



All other options pertains layout, colors and texts used by the chat widget. You can tweak them to match your overall website theme.

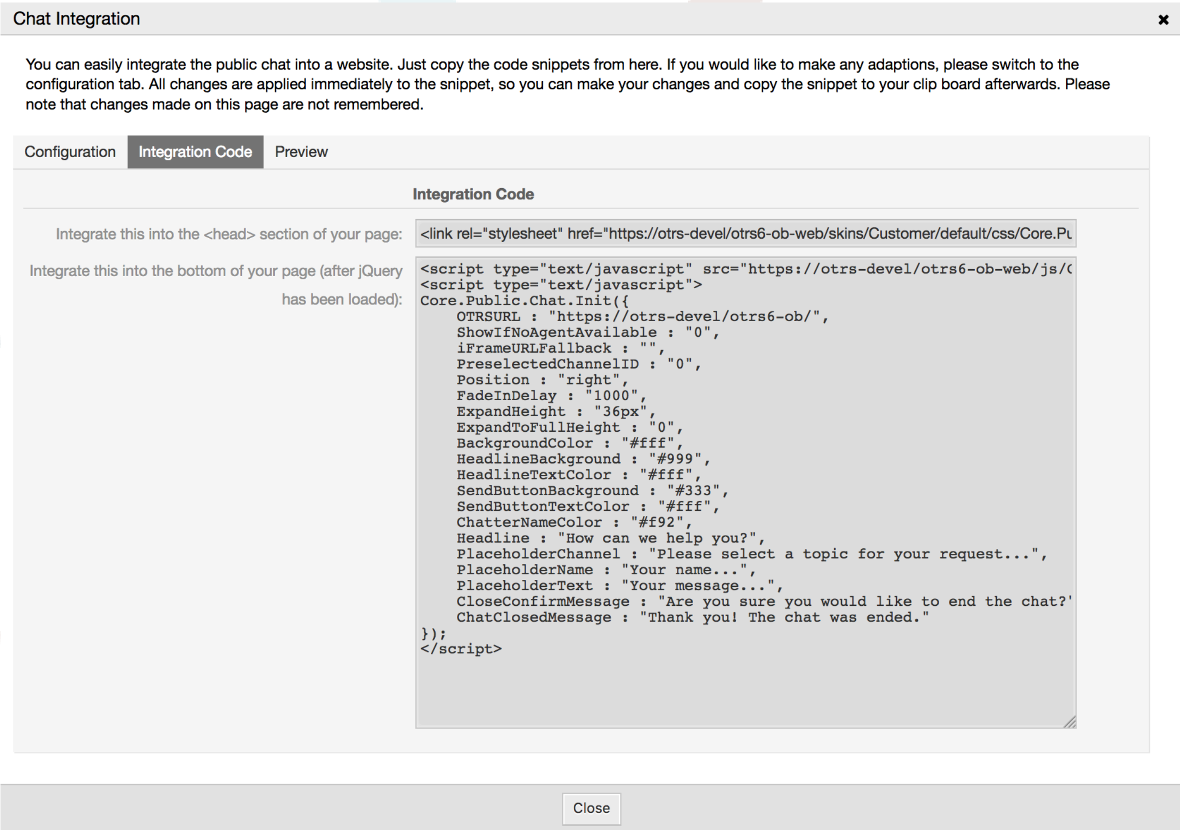
Note

Please note that changes made in the configuration tab will not be saved. Every time you open this dialog, all fields will be reset to default values.

1.5.1.2. Código de Integração

Integration Code tab contains necessary code snippets for insertion in a website, so public chat can work. All changes in the *Configuration* tab are applied immediately to the snippets, so you can make your changes and copy the code to your clipboard right afterwards.

Figure 3.15. Integration Code Tab



Code from the first field should be added to the <HEAD> section of your web page.

Code from the second field should be inserted into the bottom of the page: before closure of the <BODY> tag, but after the line that loads *jQuery* library.

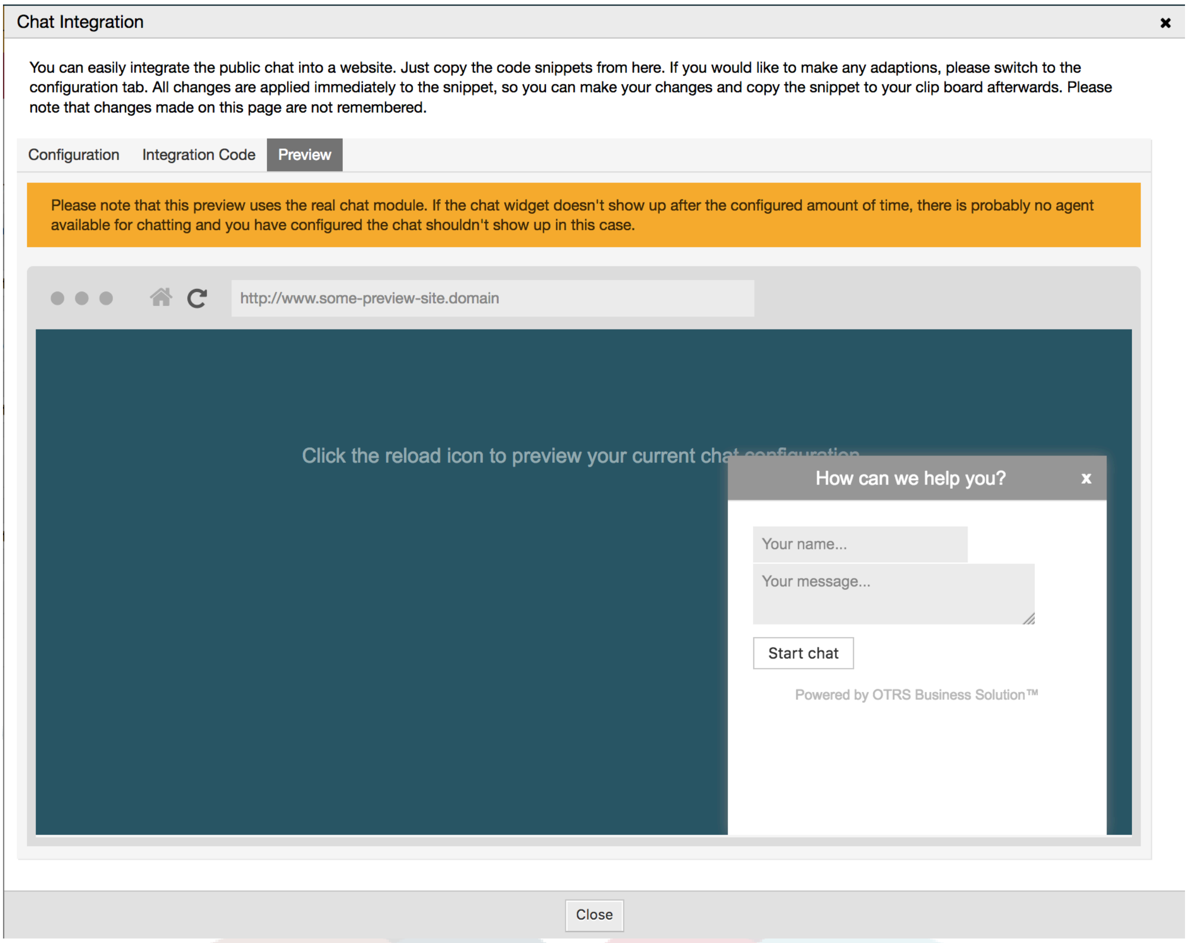
Note

Please note that your web page must also include *jQuery* library for the code snippets to work. This can be recognized by reference to the `jquery.js` or `jquery.min.js` file somewhere in the page.

1.5.1.3. Pré-visualizar

Using the *Preview* tab you can see the chat widget in action. In the browser simulator below, you can see the chat widget look based on current configuration.

Figure 3.16. Preview Tab



By clicking on the reload icon, you can refresh the simulation at any time.

Note

Please note that the preview uses the real chat module. If the chat widget doesn't show up after the configured amount of time, there are probably no agents available for chatting and you have configured the chat shouldn't show up in this case.

1.5.1.4. Troubleshooting

- If you cannot see the chat widget, but everything seems in order, make sure you have at least one agent who is externally available for chat. Or switch on the *Display Chat if no agent is available* option in the *Configuration* tab, and refresh the code.
- If you get mixed-content warnings in your browser console, make sure that OTRS configuration option `HttpType` is properly set. For example, if you are running OTRS on SSL, this configuration option must be set to `https`. Your website must run on the same protocol for chat widget to work.
- If you get errors saying that $ variable is undefined, make sure that *jQuery* library is included in your web page, and that chat related code is placed below it.

2. The Dynamic Field *Contact with Data*

Esse recurso permite adicionar os dados dos tickets com os contados.

2.1. Descrição

2.1.1. Definição dos dados e das fontes

The data sources for this feature reside on the Dynamic Fields of the new *Contact with data* type, this mean that each dynamic field of this type is a new data source. The name of the dynamic field will become the name of the data source, as they are both the same.

For each data source (dynamic field) a list of contact attributes can be defined (each attribute can contain only one text based value). The contact attributes can be set as mandatory and searchable if needed. The sort order of the attributes can be also defined.

Os atributos de contato para cada origem de dados podem conter qualquer informação sobre o contato, conforme o necessário, tais como endereços diferentes, telefone, aniversário, comida favorita, hobbies, etc.

Note

The attributes `Name` and `ValidID` are always mandatory and they are not automatically added, so for each new data source these attributes must be added manually.

Within the data source definition (or dynamic field configuration) they must be represented by the keys `Name` and `ValidID` respectively while the values could be *Name* and *Validity* for example.

2.1.2. Gerenciamento de contato

Depois de ter, pelo menos uma fonte de dados (Contato com dados do campo dinâmico) definindo, informações dos contatos que podem ser adicionados à fonte para preenche-la.

Apart from the `Name` and `ValidID`, each data source could contain different contact information as defined by the data source (e.g. a data source could have an E-mail field while another could contain Telephone and/or Mobile fields).

The management (adding or updating) contact for the data sources is done by an special screen that can be called from the Ticket menu (*Edit contacts with data*) in the main navigation bar.

2.1.3. Adicionando os contatos dos tickets

Para cada contato com os dados configurados no campo dinâmico, um contato é criado especialmente para este campo dinâmico (ou fonte de dados) podem ser escolhidas a partir de qualquer ticket ou criar ticket de tela de ação onde a dinâmica foi arquivada na e configurada anteriormente.

Os atributos do contato serão mostrados na tela de zoom do ticket.

2.1.4. Uso de pesquisa em contatos e estatísticas

Tickets can be found in search and statistics via the required attribute `Name`.

The `Name` can also be returned as a field value.

2.2. Configuração

Configuração do Sistema

`AdminContactWithData::RunInitialWildcardSearch`

Group: `OTRSBusiness`, Subgroup: `Frontend::Admin::AdminContactWithData`

Define se uma pesquisa deve ser executada quando o marcador inicialmente chamar o gerenciamento de contatos.

`Frontend::Module###AdminContactWithData`

Group: `OTRSBusiness`, Subgroup: `Frontend::Agent::ModuleRegistration`

Permite atribuir contato e as permissões de gerenciamento de detalhas de contato através da definição do grupo.

2.3. Aplicação

Em uma aplicação exemplar de contatos com os seguintes dados:

1. Create a new dynamic field of type *Contact with data*.
2. Set the possible contact attributes (possible values). `Name` and `ValidID` are required for any Contact with data Dynamic Field.
   - Add `Name` attribute (Key: `Name`, Value: *Name*).
   - Add `ValidID` attribute (Key: `ValidID`, Value: *Validity*).
   - Add any other attribute such as `Telephone` attribute (Key: `Telephone`, Value: *Phone*).
3. Add the list of mandatory attribute keys comma separated (`Name` and `ValidID` are not needed).
4. Set the attribute key order list comma separated as: `Name,Telephone,ValidID`.
5. Add the list of searchable attribute keys comma separated (`Name` is not needed).
6. Populate the data source by adding at least one contact in the newly created data source by using *Tickets* → *Edit contacts with data* screen from the main navigation bar.
7. Add the new dynamic field to the screen's configuration where it should be shown. For example in *New Phone Ticket* screen by updating the system configuration setting: `Ticket::Frontend::AgentTicketPhone###DynamicField` and do the same for `Ticket::Frontend::AgentTicketZoom###DynamicField`.
8. Go to *New phone ticket* screen, and notice that the new field is there. Add all ticket needed information.
9. Selecione um contato existente usando o preenchimento automático e escolhendo um contato.
10. O contato e seus atributos serão mostrados no zoom da tela do ticket.
11. It is possible to update the attributes of the contact by clicking the *Edit contact data* button that appears in the right side of the title of the contact data box (if the current user is a member of the groups defined in system configuration setting `Frontend::Module###AdminDynamicFieldContactWithData`).
12. Se for necessário alterar o contato para este ticket, isso pode ser feito através de qualquer outra ação do ticket onde o campo dinâmico estiver configurado para exibir.

3. The Dynamic Field *Database*

This feature implements a dynamic field of the type *Database*.

3.1. Descrição

Este recurso implementa um tipo de campo dinâmico genérico, que oferece a possibilidade de recolher dados a partir do banco de dados externos. Tais conjuntos de dados conectados pode ser pesquisado e filtrado utilizando máscaras adicionais.

encontrado e marcado o conjunto de dados relacionados, podem ser salvas para o ticket particular através do campo dinâmico.

Database dynamic fields can be created the same way, as the default dynamic fields are created.

3.2. Configuração

A seguinte lista de opções de configuração podem ser utilizadas para este recurso.

3.2.1. Adding a *Database* Dynamic Field

This feature implements a configuration interface to create dynamic fields of the type *Database*.

Database dynamic fields can be created the same way, as the default dynamic fields are created. For this switch to the *Admin* → *Ticket Settings* → *Dynamic Fields* view. In this mask you can select the *Database* field from the ticket drop down box on the left side. Currently it's not possible to use the *Database* dynamic field in the article context.

- Configuration *General - Name*:

  Dynamic fields of the type *Database* need a unique name just like other dynamic fields, too. This name has to contain only alphanumeric values. This name will be used for internal handling of the field but will not be displayed.

- Configuration *General - Label*:

  A etiqueta pode ser definida individualmente e pode conter espaços em branco etc. Ele será utilizado como etiqueta do campo nas diferentes visualizações.

- Configuration *General - Field order*:

  A ordem do campo permite que um administrador altere a ordem do campo dinâmico criado. Se mudar esta configuração obterá a ordem do campo geral que será ajustada e outros campos dinâmicos serão removidos para uma posição de volta.

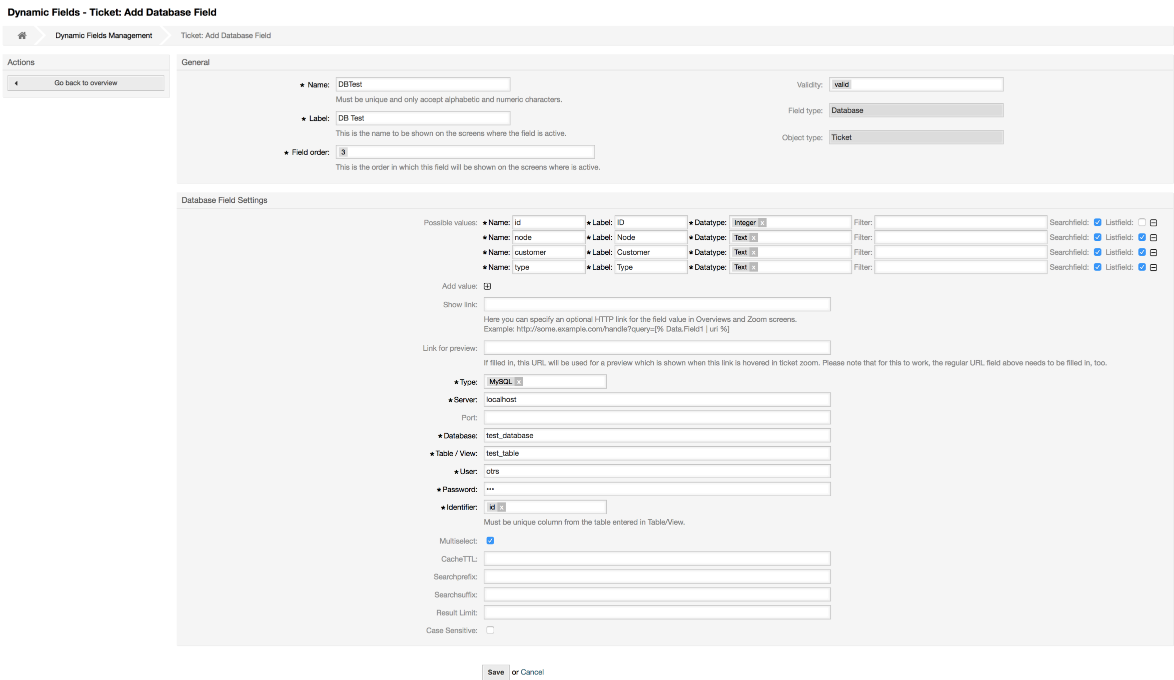
- Configuration *General - Valid*:

  To use the dynamic field in the configured OTRS views it has to be set as valid. If the field is set to *invalid* it will disappear from all the configured views but no data will be lost.

3.2.2. Configuração externa da fonte de dados

Before an external database can be searched and the results be saved at the ticket through the dynamic field, the credentials have to be stored in the configuration of the dynamic field.

Figure 3.17. Dynamic Field Database Admin screen



Tipo: O tipo de banco de dados desejado pode ser selecionado aqui. O campo suporta o padrão OTRS de tipos de banco de dados:MySQL, Oracle, PostgreSQL ou MSSQL.

- *SID*: This option is only available for Oracle connections and will be shown or hidden automatically. Within this option you have to enter the SID of your Oracle connection.
- *Driver*: This option is only available for ODBC connections and will be shown or hidden automatically. Within this option you have to enter in the hostsystem previously configured ODBC driver to connect to the desired MSSQL database.
- *Server*: The database host (hostname or IP-Address).
- *Port*: The port of the database server.
- *Database*: Defines the desired target database of the DBMS. This database will be used for queries.
- *Table / View*: This table or view will be used for the queries.
- *User*: The username for the database connection.
- *Password*: The user password for the database connection.
- *Identifier*: This select box will be automatically filled through *Possible Values (description below)*. This field represents the value which will be stored in the dynamic field.
- *Multiselect*: If this field is selected, it will be possible to store more than one value to the dynamic field. Those values will be stored comma separated.
- *CacheTTL*: This value defines the period of validity of the database cache in seconds. Equal queries to the database will be answered through the cache (local filesystem) within this period instead of asking the database again.
- *Searchprefix*: This value will be put in the front of every search term while using the autocompletion to search the database. Wildcard characters are supported as well. The

searchprefix will be ignored during the detailed search, but it is still possible to use wildcard characters in those masks.

- *Searchsuffix*: This value will be put in the end of every search term while using the autocompletion to search the database. Wildcard characters are supported as well. The searchsuffix will be ignored during the detailed search, but it is still possible to use wildcard characters in those masks.

- *Result Limit*: The entered integer value defines the maximum amount of allowed results during a database search. This includes the autocompletion search as well as the detailed search.

- *Case Sensitive*: If this field is selected, case-sensitivity will take effect on searches.

- *Possible values*: As already explained the possible values will fill up the identifier field automatically, which defines the value that will be stored in the dynamic field. Possible values can be created as much as needed (or at least as many table columns as the database table has). The possible values defines the database columns to search in. It is possible to set the column name, a description (label) the field should have, the needed data type and if the field should be a search- or listfield.

- *Name*: The exact name of the database column which will be requested through the database queries.

- *Description*: The label of the field which will be displayed in the detailed search.

- *Datatype*: The data type which will be stored in the dynamic field. Possible values: TEXT, INTEGER or DATE.

- *Filter*: With the filter field, it is possible to choose a ticket attribute or a dynamic field as a filter for the related column. If the dynamic field is bound to a related ticket, the attributes will be used for the filter mechanism, otherwise the filters will be ignored. If filter will be configured to a table column, only search results matching to the search term and the related ticket attribute on exactly the configured column will be displayed.

- *Searchfield*: Indicates if a field should be included in the search requests.

- *Listfield*: Indicates if a field should be displayed in the results.

3.2.3. Configuração da tela

Dynamic fields of type *Database* have to be activated for the several masks in which they should be displayed like the other types of dynamic fields.

This can be done through *Admin* → *System Administration* → *SysConfig*, in which *Ticket* must be selected on the left hand side.

For every interface area (Frontend), in which the dynamic field of type *Database* should be displayed, the admin has to configure it to fit his needs. Examples:

- `Frontend::Agent::Ticket::ViewZoom` for the ticket zoom view.

- `Frontend::Agent::Ticket::ViewPhoneNew` for new phone tickets.

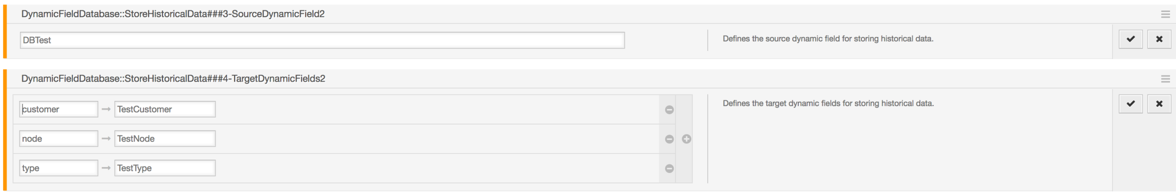
- `Frontend::Agent::Ticket::ViewEmailNew` for new email tickets.

- In each of these view configurations is an entry called `Ticket::Frontend::AgentTicket*###DynamicField`. This configuration defines which dynamic field(s) should get displayed in this view. To add a dynamic field, the internal name of the field has to be filled in the *Key* field. The field *Value* can take the values 0 (deactivated), 1 (active) and 2 (active and mandatory).

3.2.4. Armazenamento de dados históricos

This feature offers a functionality to store historical data. For this to work it´s necessary to activate and set SysConfig options, as visibly in the following screenshot:

Figure 3.18. Banco de dados DynamicField - Configuração de dados históricos



In the configuration option for the `SourceDynamicField` it´s needed to fill in the already created dynamic (Database) field name, which will be used to gather the historical data. In the related option `TargetDynamicField` the field(s) *Key* have to be filled with the table columns of the connected external database, which will be readout. For every column the related target dynamic field has to be configured in the field *content*. The gathered data will be saved in these dynamic fields.

If the configuration is ready and active, the configured fields will be readout from the external database, since the source field gets a new value via the configured masks. The data will be searched by it´s stored identifier via an event module and the found values will be stored in the target dynamic fields.

3.2.5. Configurações Sysconfig

`AutoComplete::Agent###DynamicFieldDatabaseSearch`

Group: `Framework`, Subgroup: `Frontend::Agent`

Define as opções de configuração para o recurso de preenchimento automático.

`Ticket::EventModulePost###950-StoreHistoricalData`

Group: `Ticket`, Subgroup: `Core::Ticket`

Atualizações de campos dinâmicos, se os configurados serão atualizados.

`DynamicFieldDatabase::StoreHistoricalData###1-SourceDynamicField1`

Group: `OTRSBusiness`, Subgroup: `Core`

Define a fonte no campo dinâmico para o armazenamento de dados históricos.

`DynamicFieldDatabase::StoreHistoricalData###2-TargetDynamicFields1`

Group: `OTRSBusiness`, Subgroup: `Core`

Define o alvo do campo dinâmico para o armazenamento dos dados históricos.

`DynamicFieldDatabase::StoreHistoricalData###3-SourceDynamicField2`

Group: `OTRSBusiness`, Subgroup: `Core`

Define a fonte no campo dinâmico para o armazenamento de dados históricos.

`DynamicFieldDatabase::StoreHistoricalData###4-TargetDynamicFields2`

Group: `OTRSBusiness`, Subgroup: `Core`

Define o alvo do campo dinâmico para o armazenamento dos dados históricos.

3.3. Aplicação

utilizar um exemplar do seguinte banco de dados DynamicField:

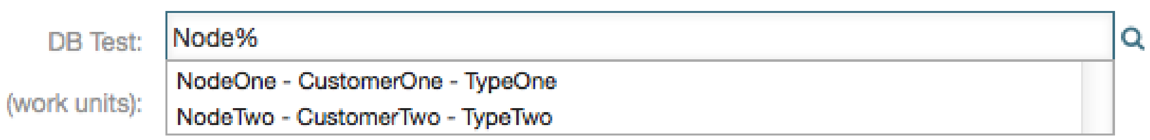
3.3.1. Pesquisando e salvando os conjuntos de dados - Preenchimento automático

After the created dynamic fields are activated in the well known masks (like `ViewPhoneNew`, `ViewEmailNew`) a new text field appears with the name, the dynamic field got in the configuration. In this field it is possible to input searchterms and therefore execute a search over all configured database fields. Otherwise do a click on the link *Detailed search* and start a detailed search in which the fields to search in are selected explicitly.

Figure 3.19. Banco de dados DynamicField - campo de teste

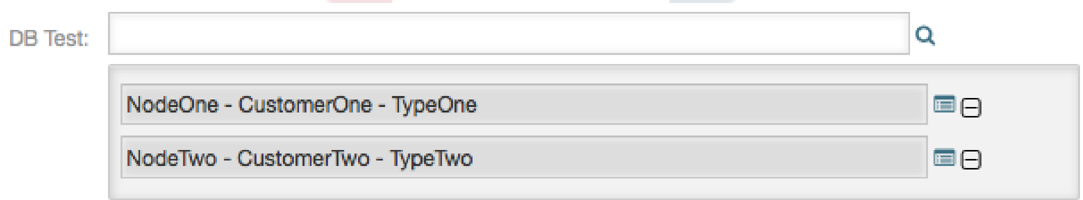
Since search terms are typed in into the text field, a database search will be started over the configured columns and the result will displayed via an autocompletion below the text field. The more exact the search term is, the more exact will be the result (less result entries).

Figure 3.20. DynamicField Database - Autocomplete feature



If the wished value will be displayed in the results, it can be selected via a mouse click or via the keyboard and therefore be added to the dynamic field results.

Figure 3.21. Banco de dados DynamicField - Itens selecionados



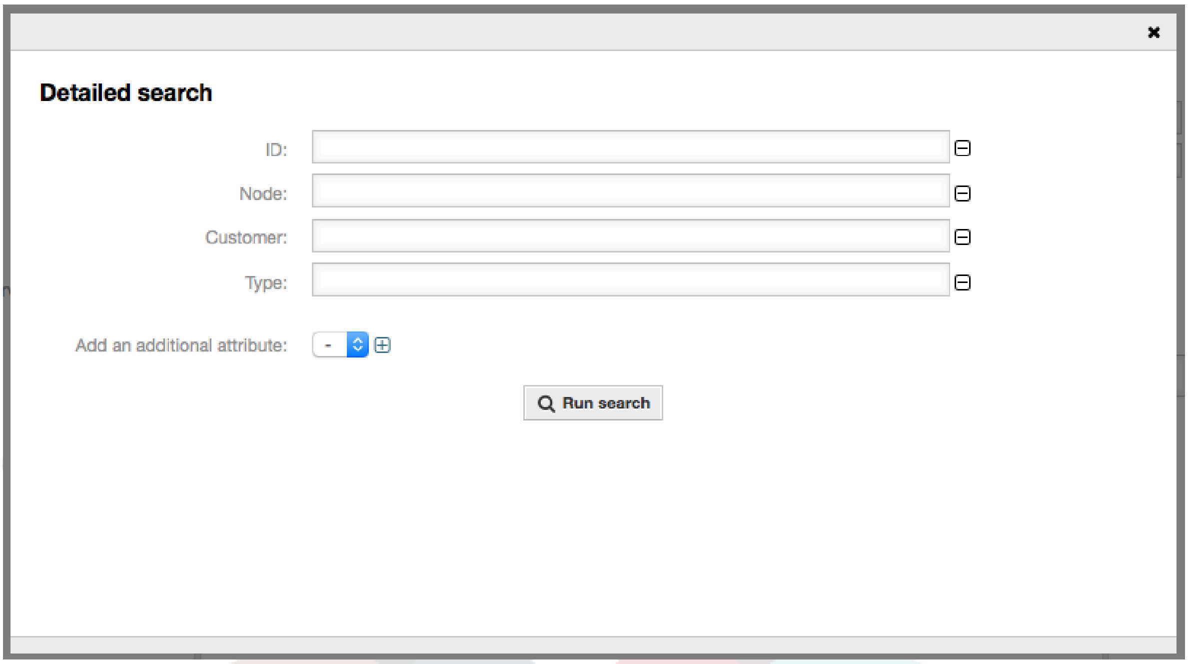
Via the link *Details* a popup screen can be accessed, which offers detailed information about the whole result row. This information includes the line headers and the data. This information can be used to get an overview about the rest (of the not configured) columns or to compare data.

Adicionado o resultado, o mesmo pode ser removido através do botão de entrada menos.

3.3.2. Pesquisando e salvando os conjuntos de dados - Pesquisa detalhada

The link *Detailed search* opens a new modal dialog to start a new database search. In this mask it is possible to select the fields to search on explicitly.

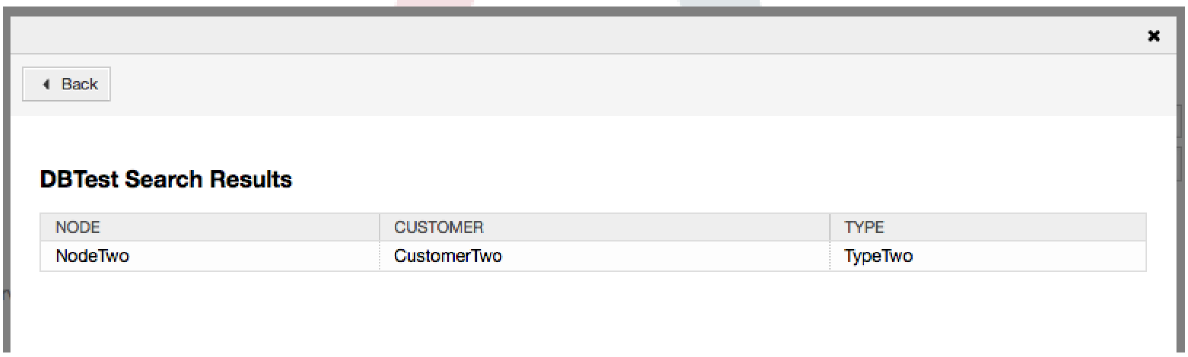
Figure 3.22. Banco de dados do DynamicField - Pesquisa detalhada



By default the first available field is activated, but it´s also possible to remove available fields or add additional ones. Only activated and filled fields are considered for the search. Wildcard characters '*' are allowed in every single field.

The database search will be executed via the *Start search* button and the results will be tabular displayed. If the search was successful, the results will be listed and one of the entries can be selected via a mouse click. The value will be added to the list of saved values afterwards.

Figure 3.23. Banco de dados do DynamicField - Resultado da pesquisa detalhada



Utilizando independente o preenchimento automático ou a pesquisa detalhada, pode apenas cada resultado selecionado. Se um agente tentar selecionar um valor várias vezes, uma mensagem de aviso será exibida.

4. The Dynamic Field *Web Service*

This feature implements a dynamic field of the type *Web Service*.

4.1. Descrição

This feature implements a generic dynamic field type that gathers its selectable options from an external system using a web service. The response from the external system defines the possible options to be displayed, and they could vary depending on the data that is sent in the request.

Normally when a field is changed in a screen (e.g. the ticket priority in the *New phone ticket* screen) the values of other fields could be updated. That is the case with this type of dynamic fields, as they could also include all screen field values in the request and the remote server could potentially return completely different values depending on input.

Additionally if the dynamic field source object already exists (e.g. a ticket, and the field is set in the *Free Fields* screen), the details of the already created ticket are also included in the request.

4.2. Configuração

To make this feature work it is necessary to have the following components:

4.2.1. A web service (at least configured as requester)

To create a new *web service dynamic* field it is necessary to have already a working web service, it requires to have at least one invoker of the type `Generic::PassThrough`. This invoker will be called to fetch the data from the remote server.

The original data that it is sent in a request is similar to the following example.

```
{
  DynamicFieldID    => 123,
  DynamicFieldLabel => 'NameX',
  DynamicFieldName  => 'NameX',
  DynamicFieldValue => 'Value',
  Form => {
    # Form fields
    # ...
  },
  Ticket => {
    # Ticket attributes
    # ...
  },
  DynamicField => {
    NameX => 'Value'
    MameY => [  ‘Value’ ],
  },
  UserID => 123,
},
```

The `Form` section contains the fields in the current form in the web browser. This information changes as the screen is filled in.

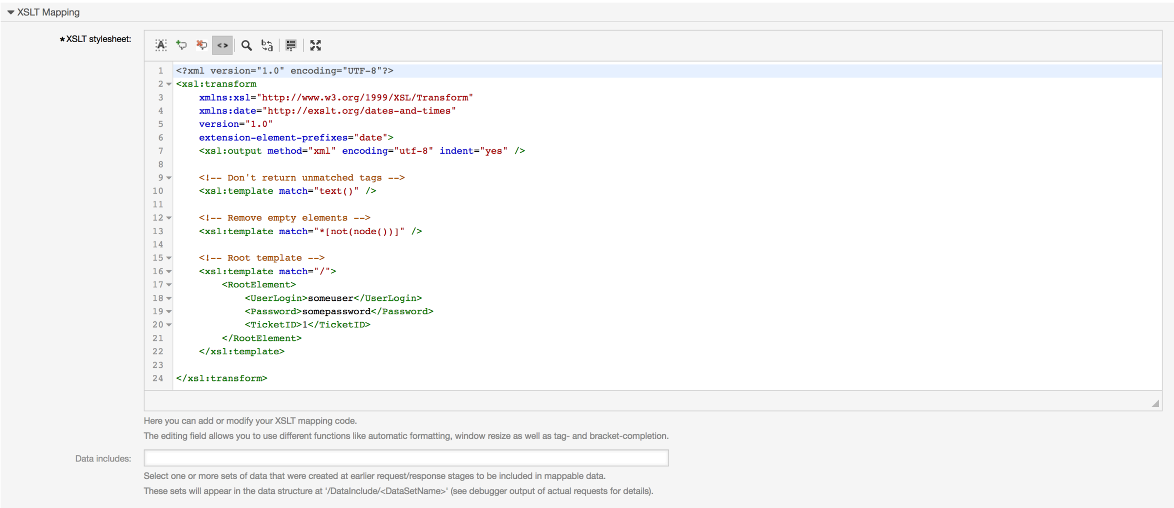
`Ticket` section (or another source object, e.g. `CustomerUser`), contains the attributes of the object where the dynamic field belongs. For example in *New phone ticket* screen the section is empty as the ticket is not created yet, but in *Free Fields* screen it contains the information of the current ticket.

`DynamicField` section contains all non empty values of all configured dynamic fields for the current object.

In most cases the data that the remote server requires will be very different from the data provided, so it is highly recommended to use a mapping module for the outgoing data, to format it specifically for the remote server call.

The following example shows an XSLT mapping that discards any data and sets a fixed `UserLogin`, `Password` and `TicketID` (as needed for a `TicketGet` operation).

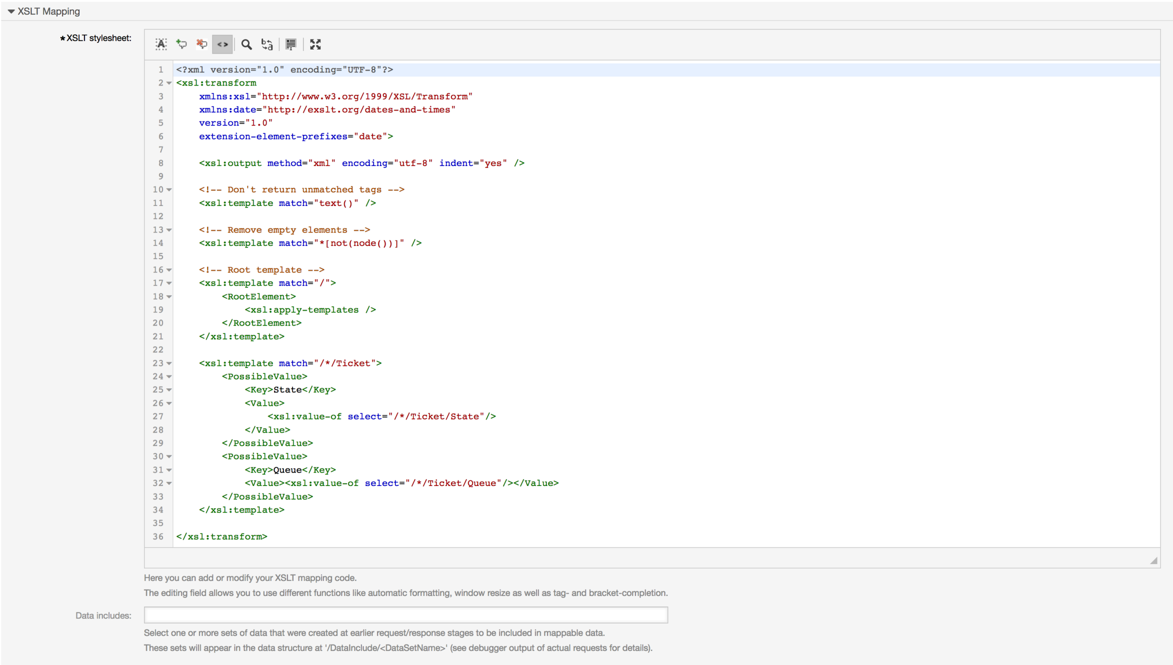
Figure 3.24. Dynamic Field *Web Service* - Outgoing mapping example



The response from the server can also be very different, so in this case is also very recommended to use a mapping module for the incoming data in order to be able to process the information. The response must be a list of Key and Value elements.

The following example shows an XSLT mapping that converts the results from a `TicketGet` operation response form the remote server, extracting and formatting the state and queue as needed to be used as options for the dynamic field.

Figure 3.25. Dynamic Field *Web Service* - Incoming mapping example



The following web service definition (importable YAML file) can be used for testing the field, but the endpoint must be adapted to match current system. This web service acts as requester and provider and it always returns the State and Queue from TicketID 1, as possible values to the field.


```
---
Debugger:
  DebugThreshold: debug
  TestMode: '0'
Description: Dynamic Field Web Service Test
FrameworkVersion: 6.0.x git
Provider:
  ErrorHandling: {}
  ErrorHandlingPriority: []
  Operation:
    TicketGet:
      Description: ''
      IncludeTicketData: ''
      MappingInbound: {}
      MappingOutbound: {}
      Type: Ticket::TicketGet
  Transport:
    Config:
      AdditionalHeaders: ~
      MaxLength: '100000000'
      NameSpace: http://www.otrs.org/TicketConnector/
      RequestNameFreeText: ''
      RequestNameScheme: Plain
      ResponseNameFreeText: ''
      ResponseNameScheme: Response
    Type: HTTP::SOAP
RemoteSystem: ''
Requester:
  ErrorHandling: {}
  ErrorHandlingPriority: []
  Invoker:
    TicketGet:
      Description: Get possible values from the other side.
      Events: []
```

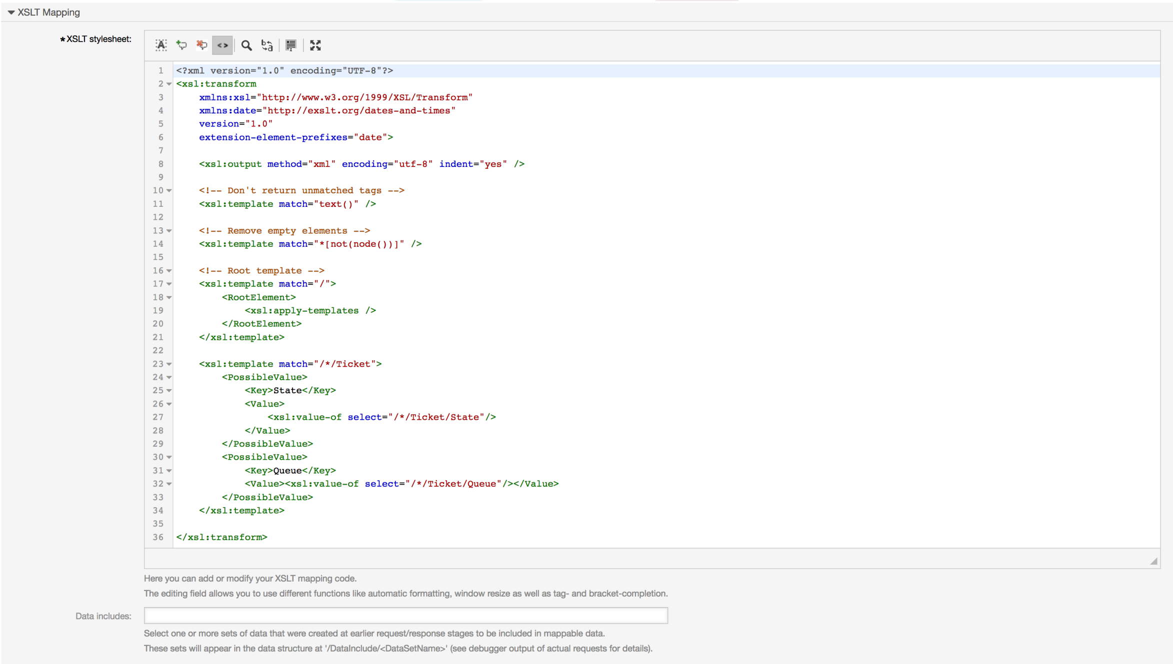
```
      MappingInbound:
        Config:
          Template: "<?xml version=\"1.0\" encoding=\"UTF-8\"?>\r\n<!--\r\nCopyright
            (C) 2001-2018 OTRS AG, https://otrs.com/\r\nThis software comes with ABSOLUTELY
            NO WARRANTY. For details, see\r\nthe enclosed file COPYING for license
            information (GPL). If you\r\ndid not receive this file, see https://www.gnu.org/
licenses/gpl-3.0.txt.\r\n-->\r\n\r\n<!--
            DOCUMENTATION\r\n\r\n* Example XML Input *\r\n<RootElement>\r\n    ...\r\n</
RootElement>\r\n\r\n\r\n*
            Example XML Output *\r\n<RootElement>\r\n    <PossibleValues>\r\n
 <Key>???</Key>\r\n
            \       <Value>???</Value>\r\n    </PossibleValues>\r\n    <PossibleValues>\r\n
            \       <Key>???</Key>\r\n        <Value>???</Value>\r\n    </PossibleValues>\r
\n
            \   ...\r\n</RootElement>\r\n\r\n-->\r\n\r\n\r\n<xsl:transform\r\n    xmlns:xsl=
\"http://www.w3.org/1999/XSL/Transform\"\r\n
            \   xmlns:date=\"http://exslt.org/dates-and-times\"\r\n    version=\"1.0\"\r\n
            \   extension-element-prefixes=\"date\">\r\n    \r\n    <xsl:output method=\"xml
\"
            encoding=\"utf-8\" indent=\"yes\" />\r\n    \r\n    <!-- Don't return
            unmatched tags -->\r\n    <xsl:template match=\"text()\" />\r\n    \r\n
            \   <!-- Remove empty elements -->\r\n    <xsl:template match=\"*[not(node())]\"
            />\r\n    \r\n    <!-- Root template -->\r\n    <xsl:template match=\"/\">\r\n
            \       <RootElement>\r\n            <xsl:apply-templates />\r\n        </
RootElement>\r\n
            \   </xsl:template>\r\n\r\n    <xsl:template match=\"/*/Ticket\">\r\n
            \       <PossibleValue>\r\n            <Key>State</Key>\r\n
 <Value><xsl:value-of
            select=\"/*/Ticket/State\"/></Value>\r\n        </PossibleValue>\r\n
 <PossibleValue>\r\n
            \           <Key>Queue</Key>\r\n            <Value><xsl:value-of select=\"/*/
Ticket/Queue\"/></Value>\r\n
            \       </PossibleValue>\r\n    </xsl:template>\r\n    \r\n</xsl:transform>"
        Type: XSLT
      MappingOutbound:
        Config:
          Template: "<?xml version=\"1.0\" encoding=\"UTF-8\"?>\r\n<!--\r\nCopyright
            (C) 2001-2018 OTRS AG, https://otrs.com/\r\n\r\nThis software comes with
            ABSOLUTELY NO WARRANTY. For details, see\r\nthe enclosed file COPYING
            for license information (GPL). If you\r\ndid not receive this file, see
            https://www.gnu.org/licenses/gpl-3.0.txt.\r\n-->\r\n\r\n<!-- DOCUMENTATION\r\n\r
\n*
            Example XML Input *\r\n<RootElement>\r\n    ...\r\n</RootElement>\r\n\r\n\r\n*
            Example XML Output *\r\n<RootElement>\r\n    <PossibleValues>\r\n
 <Key>???</Key>\r\n
            \       <Value>???</Value>\r\n    </PossibleValues>\r\n    <PossibleValues>\r\n
            \       <Key>???</Key>\r\n        <Value>???</Value>\r\n    </PossibleValues>\r
\n
            \   ...\r\n</RootElement>\r\n\r\n-->\r\n\r\n<xsl:transform\r\n    xmlns:xsl=
\"http://www.w3.org/1999/XSL/Transform\"\r\n
            \   xmlns:date=\"http://exslt.org/dates-and-times\"\r\n    version=\"1.0\"\r\n
            \   extension-element-prefixes=\"date\">\r\n    <xsl:output method=\"xml\"
            encoding=\"utf-8\" indent=\"yes\" />\r\n\r\n    <!-- Don't return unmatched
            tags -->\r\n    <xsl:template match=\"text()\" />\r\n\r\n    <!-- Remove
            empty elements -->\r\n    <xsl:template match=\"*[not(node())]\" />\r\n\r\n
            \   <!-- Root template -->\r\n    <xsl:template match=\"/\">\r\n
 <RootElement>\r\n
            \           <UserLogin>someuser</UserLogin>\r\n
 <Password>somepassword</Password>\r\n
            \           <TicketID>1</TicketID>\r\n        </RootElement>\r\n    </
xsl:template>\r\n\r\n</xsl:transform>"
        Type: XSLT
      Type: Generic::PassThrough
  Transport:
    Config:
      Encoding: ''
      Endpoint: http://localhost/otrs/nph-genericinterface.pl/Webservice/
GenericConfigItemConnectorSOAP
      NameSpace: http://www.otrs.org/TicketConnector/
      RequestNameFreeText: ''
      RequestNameScheme: Plain
      ResponseNameFreeText: ''
```

```
      ResponseNameScheme: Response
      SOAPAction: Yes
      SOAPActionSeparator: '#'
      SSL:
        SSLProxy: ''
        SSLProxyPassword: ''
        SSLProxyUser: ''
    Type: HTTP::SOAP
  UseMappedData: '1'
```

4.2.2. A web service dynamic field definition

After the proper configuration of web services, it is possible to configure dynamic fields, that use such web services.

Figure 3.26. Dynamic Field *Web Service* - Definition Example



Below is a description of the dynamic field options.

Serviço Web

The configured web service whose invokers will be to triggered when a dynamic field is displayed.

Invoker

The invoker that is used to send requests to external systems. Within this field, just invokers of type `Generic::PassThrough` will be displayed.

Multisseleção

A drop-down menu to determine if the displayed dynamic field should act as a multi-select field, instead of a drop-down field.

Cache TTL

A cache time to live value, that contains a value (in minutes). If the value is 0 or empty, no caching will be active.

This cache is to prevent unnecessary requests to the remote server using the same values.

Adicionar Valor Vazio

Defines if it is possible to save an empty value in the field.

Visão de árvore

This option activates the tree view of possible values, if they are supplied in the correct format.

Valores Traduzíveis

Defines if the displayed possible values will be translated to the current user language.

4.2.3. Configuração da tela

Dynamic fields of type *Web Service* have to be activated for the several masks in which they should be displayed like the other types of dynamic fields. The following covers the cases for ticket based dynamic fields.

This can be done through *Admin* → *Administration Overview* → *System Configuration*, then navigate to *Frontend* → *Agent* → *View*.

For every `Ticket*` option, in which the dynamic field of type *Web Service* should be displayed, the admin has to configure it to fit his needs. Examples:

- `TicketZoom` for the ticket zoom view.
- `TicketPhoneNew` for new phone tickets.
- `TicketEmailNew` for new email tickets.
- The dynamic field can be added if there exists an entry called `Ticket::Frontend::AgentTicket*###DynamicField`. This configuration defines which dynamic fields should be displayed in this view. To add a dynamic field, the internal name of the field has to be filled in the first field. After confirmation a second field is filled with the display option. Choose *1 - Enabled* to just show the field or *2 - Enabled and required* to make it mandatory.

4.3. Aplicação

The use of the *Web Service* dynamic field is similar to other dynamic fields like *Dropdown* or *Multiselect*, but users could expect to have different options to choose even without active ACLs due to the change of parameters in the web request as other fields are changed.

5. Import Ready2Adopt Process

5.1. Importar

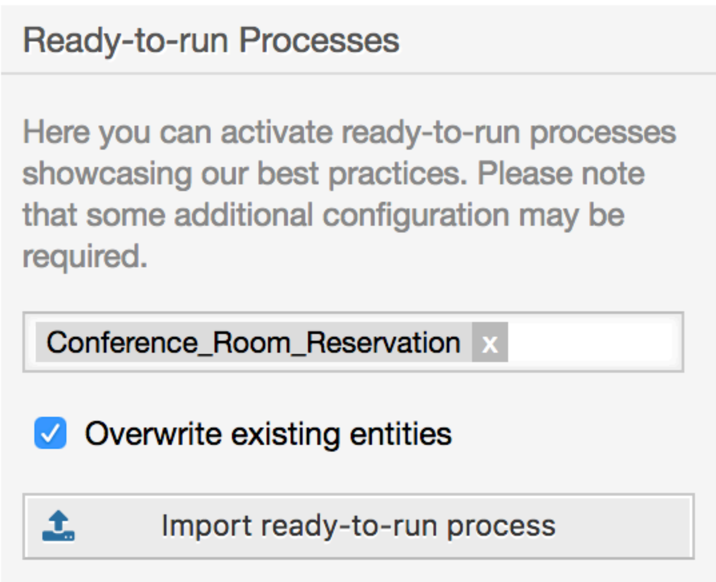
On the *Process Management* screen in the Admin interface you can find an *Ready2Adopt Processes* widget, where you can find some best practice Ready2Adopt processes.

The following Ready2Adopt processes are available in the **OTRS Business Solution**™:

- Conference Room Reservation
- Office Materials Procurement
- Order Request Management

- Request For Leave Management
- Service Design::Availability Management (proactive)
- Service Design::Availability Management (reactive)
- Service Design::Catalogue Management
- Service Design::Continuity Management
- Service Design::Service Design Coordination (individual design)
- Service Design::Service Level Management
- Service Design::Supplier Management
- Service Operation::Access Management
- Service Operation::Event Management
- Service Operation::Incident Management
- Service Operation::Problem Management
- Service Operation::Request Fulfillment Management
- Service Operation::Service Validation and Testing
- Service Transition::Change Evaluation
- Service Transition::Knowledge Management
- Service Transition::Release And Deployment Management
- Service Transition::Service Asset and Configuration Management
- Service Transition::Service Transition Planning and Support
- Start RMA
- Travel Expense

Figure 3.27. Import Ready2Adopt Process Widget



To install a Ready2Adopt process, just select the desired process from the drop-down menu in the *Ready2Adopt Processes* widget and click the *Import Ready2Adopt process* button.

During the import process, OTRS takes care of creating the needed dynamic fields and/or any needed updates to the system configuration.

6. Import Ready2Adopt Web Services

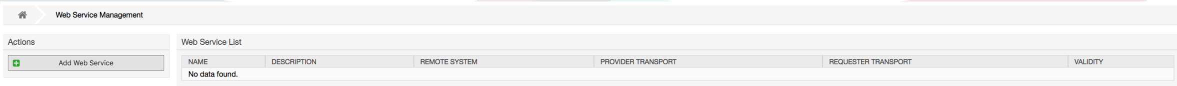
6.1. Importar

There are three Ready2Adopt web services available in the **OTRS Business Solution**™:

- BugzillaConnector
- JIRAConnector
- OTRSConnector

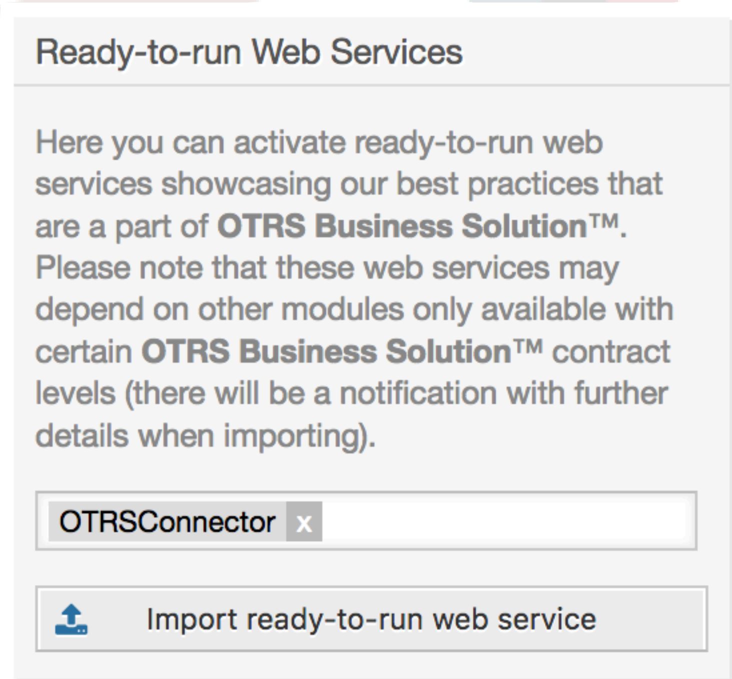
To install one of these web services, go to the *GenericInterface Web Service Management* page and click on the *Add web service* button.

Figure 3.28. Adicionar Web Server



Locate the *Ready2Adopt Web Services* widget, select one of the provided web services from the drop-down menu, and click the *Import Ready2Adopt web service* button.

Figure 3.29. Import Ready2Adopt Web Service



During the import process, OTRS takes care of creating the needed dynamic fields and/or any needed updates to the system configuration.

Note

The Ready2Adopt web services may require additional feature add-ons to be installed (**OTRSGenericInterfaceInvokerTicket** and **OTRSGenericInterfaceInvokerEventFilter**).

7. Notificação do SMS e Notificação da visualização da web

7.1. Descrição

The **OTRS Business Solution**™ comes with two new notification features: SMS notifications and the notification web view. Both of them are technically notification methods besides the existing email method and can be activated for each notification (e.g. *Ticket new note notification* or *Ticket create notification*) on the *Notification Event* screen in the Admin interface.

7.2. Configurando as notificações do SMS

Note

Before taking advantage of SMS notification transport method, you must first activate the SMS cloud service.

In order to use SMS as a way of notification for admins and customers, you have to buy an SMS unit package. Please get in touch with sales@otrs.com on this matter. Once you've bought a package, you will be able to look up your current contingent of remaining SMS units on the admin screen for the SMS cloud service (`AdminCloudServiceSMS`).

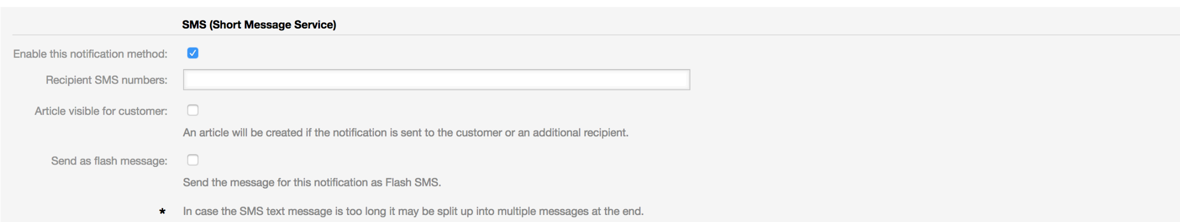
To make SMS available for notifications, you have to enable it for the notifications of your choice in *Notification Event* screen in the Admin interface. Besides the existing *Email* notification method, you can enable SMS notifications by enabling the checkbox as to be seen in the screenshot below.

Note

Please be careful using the *Send by default* checkbox on SMS notifications. Enabling this checkbox will cause this notification to be sent by SMS to all agents with a phone number stored in the configured field. This could cause a high usage of your available SMS units!

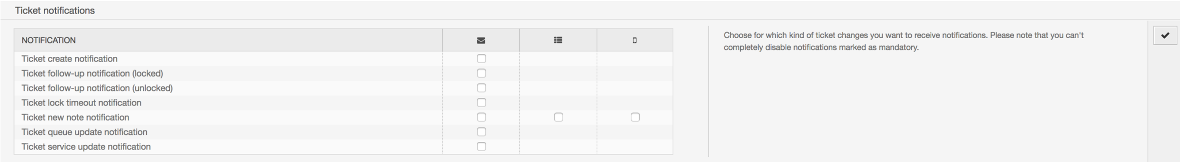
On this screen, you can also add more generic phone numbers (e.g. for archiving purposes) which will receive all of the relevant notifications (besides the addressed agents). Please note that all of these recipients will be treated as customers (regarding article creation).

Figure 3.30. Ativando as notificações do SMS



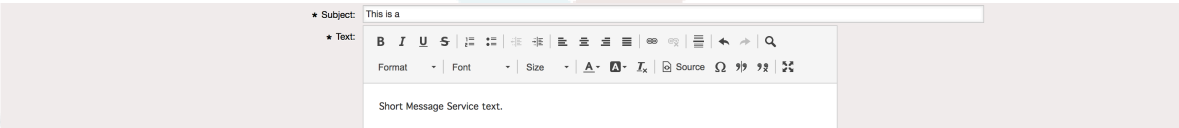
Se você tiver configurado uma notificação para ser visível nas preferencias do agente, os agentes deverão agora ser capazes de ativar/desativar as notificações no SMS manualmente no seu próprio para esta notificação.

Figure 3.31. Configurações da notificação das preferências do agente SMS



SMS notification text will be constructed on fly by combining both *Subject* and *Text* fields of the corresponding language. You can of course use supported OTRS tags in these fields, and additionally URLs can be shortened by activating URL shortening option in cloud service configuration.

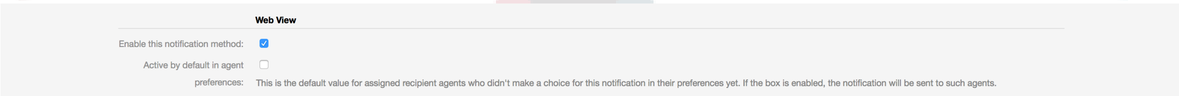
Figure 3.32. SMS Notification Text Fields



7.3. Configurando e utilizando a visualização da notificação da web

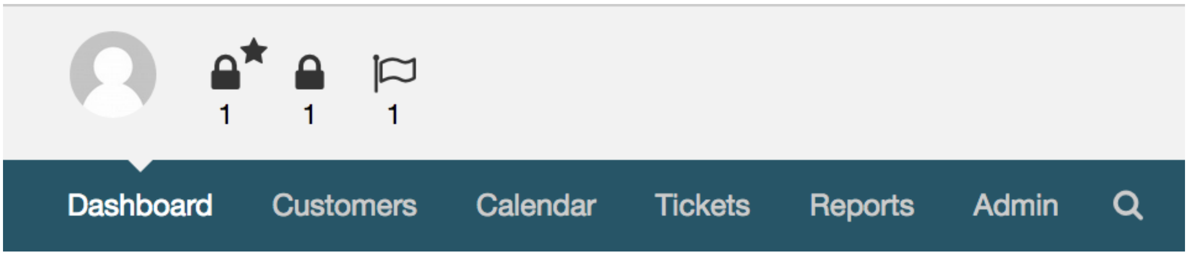
Configurando as notificações visualizada na web para agentes, é semelhante a configuração de notificações SMS conforme descrito acima.

Figure 3.33. Visualizando e ativando as notificações da web



Uma vez que você ativar a notificação para uma determinada notificação na web view, visualizarão um novo ícone na parte superior da tela OTRS (dentro da barra de ferramenta) cada vez que chaga uma nova notificação.

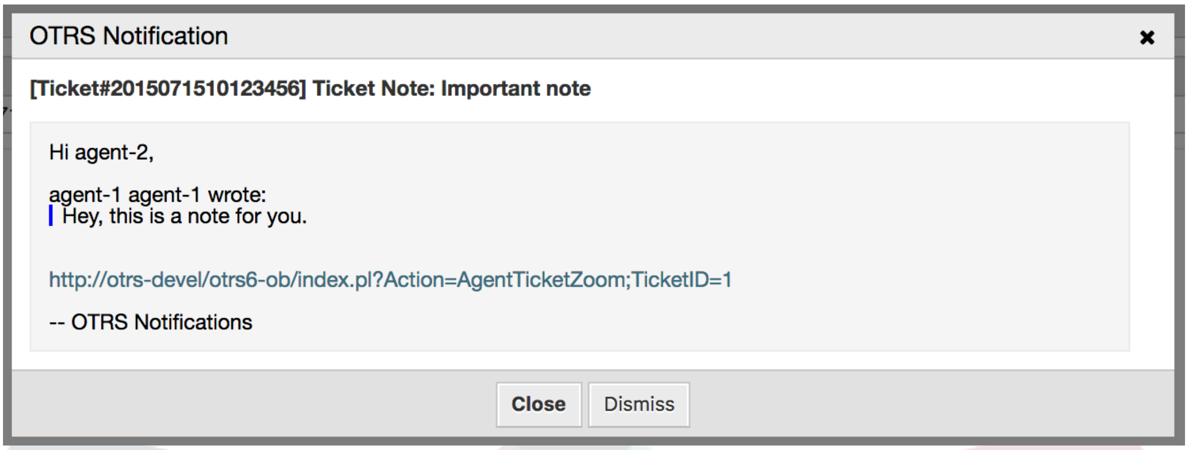
Figure 3.34. Visualizar as notificação da web no ícone na barra de ferramentas



Clicando neste ícone, os agentes deverão obter uma visão geral de todas as suas notificações e pode ler e descartá-los aqui.

Figure 3.35. Visualizar as notificação fora da web

Figure 3.36. Visualizar os detalhes da notificação da web



8. O gerador de relatório

8.1. Descrição

O relatório gerador permite combinar várias estatísticas para o envio/download. Os relatórios podem ser configurados para ser enviado automaticamente em horários especificados ou executar manualmente.

8.2. Configuração

Nenhuma configuração adicional necessária.

8.3. Aplicação

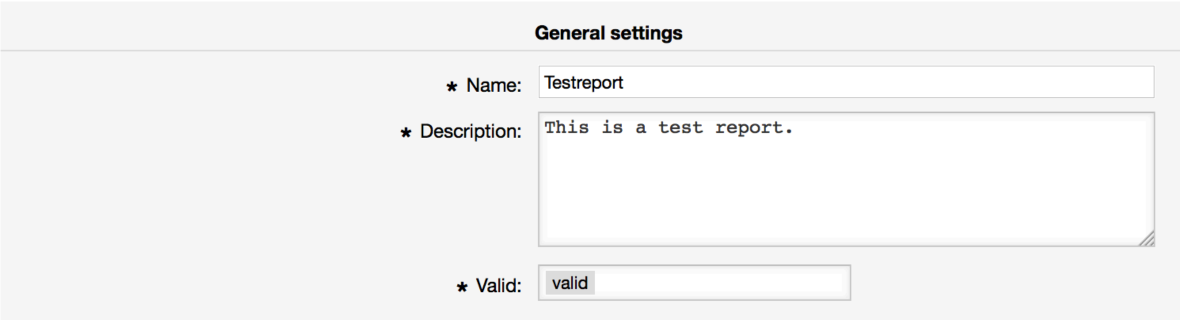
8.3.1. Criando relatórios

Depois de ter introduzido o título e a descrição para o relatório na primeira etapa, você será capaz de configurar o seu relatório.

8.3.1.1. Configurações gerais

Configurar o título, a descrição e a validade do relatório. Esta informação não será visível no relatório.

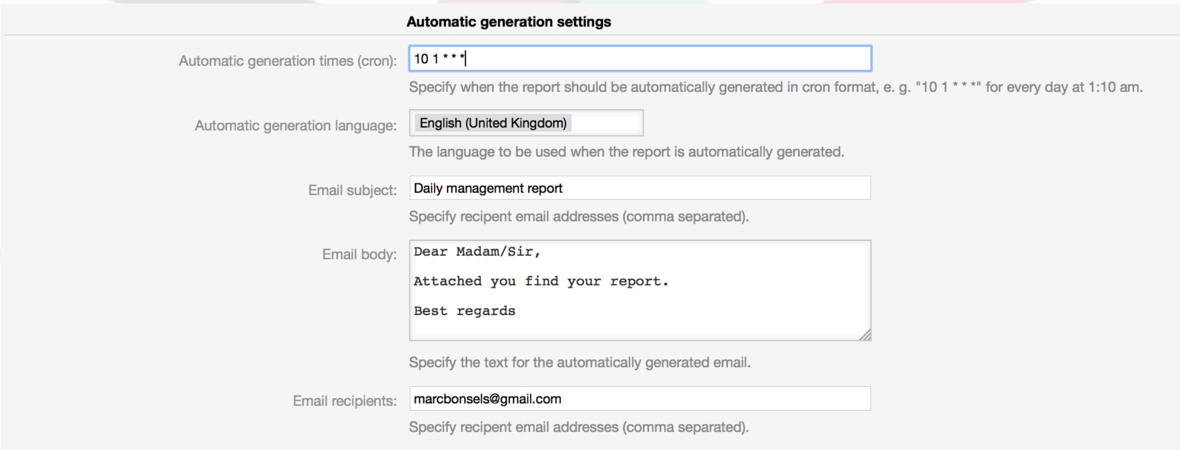
Figure 3.37. Geração automática de configurações



8.3.1.2. Geração automática de configurações

Se o relatório dever ser gerado automaticamente (por exemplo, uma vez por dia), você pode configurar os objetos do texto e destinatários para o e-mail que será enviado e conterá como anexo o relatório. Você também precisará adicionar informações sobre a frequência que o relatório deve ser enviado. O formato de dados são retirados do mecanismo de cron baseados em sistemas operacionais Unix. Para obter mais informações sobre as configurações possíveis, as quais são consultados os documentos cron de fontes oficiais ou wikipedia.

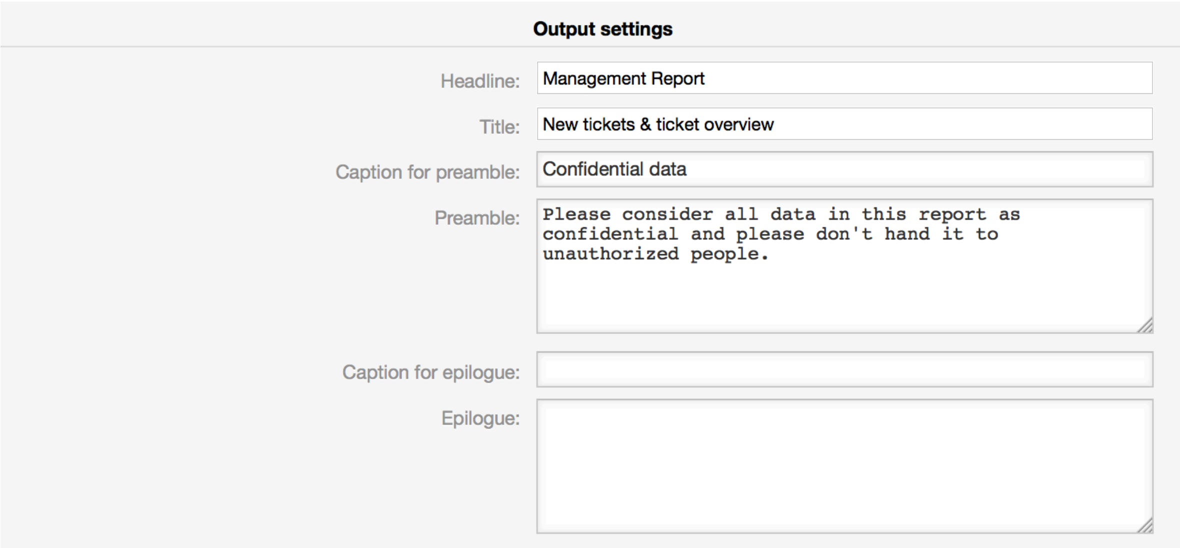
Figure 3.38. Geração automática de configurações



8.3.1.3. Configurações de saída

Nesta seção, você pode configurar as informações adicionais que devem ser incluídas no relatório (por exemplo um preâmbulo ou epílogo). Por exemplo isso poderia ser utilizado para adicionar informações de direitos autorais ou de proteção de dados.

Figure 3.39. Configurações de saída

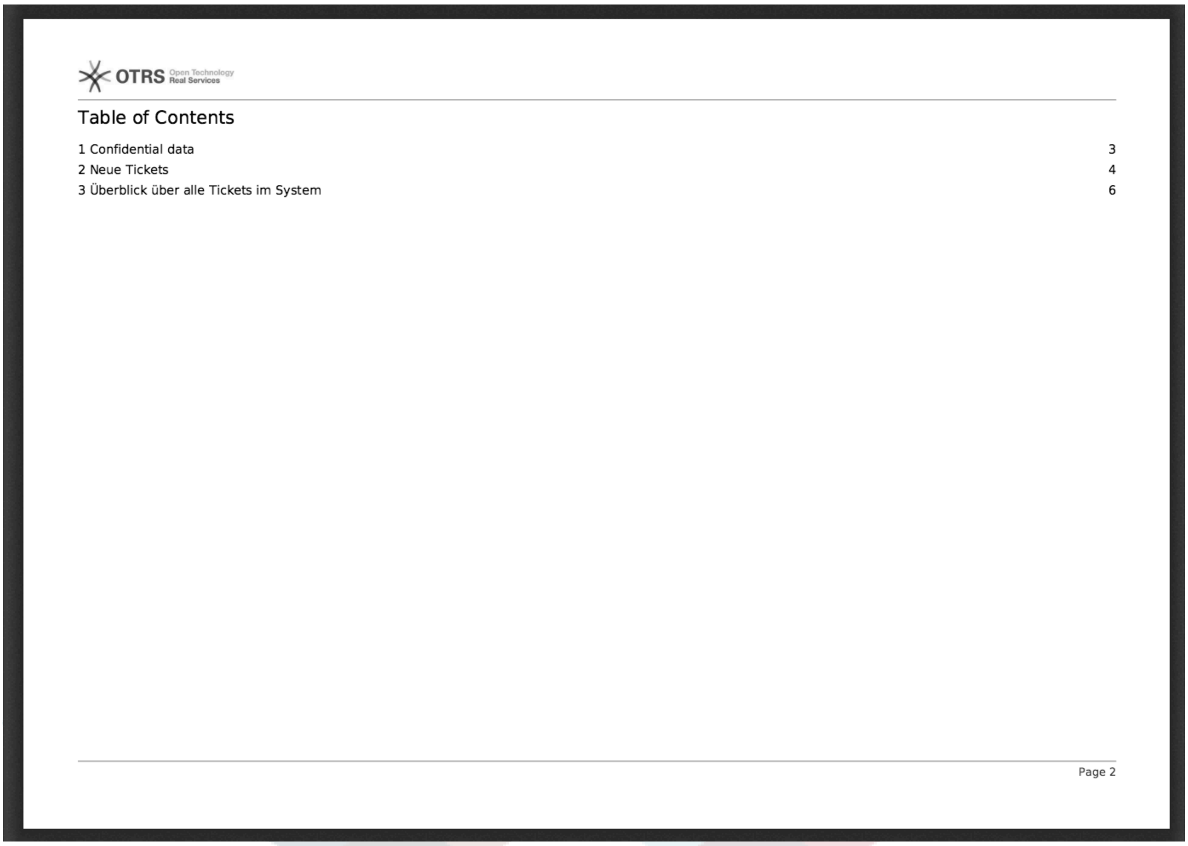


8.3.2. Gerando relatórios manualmente

To generate a report, you can use the *Run now* button from the reports overview. You'll be asked for confirmation and afterwards the report will be created and sent immediately. Please find screenshots of a generated report below.

Figure 3.40. Relatório: Página frontal

Figure 3.41. Relatório: Tabela de conteúdo



OTRS Open Technology Real Services

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2 Neue Tickets	4
3 Überblick über alle Tickets im System	6

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Figure 3.42. Relatório: Preâmbulo

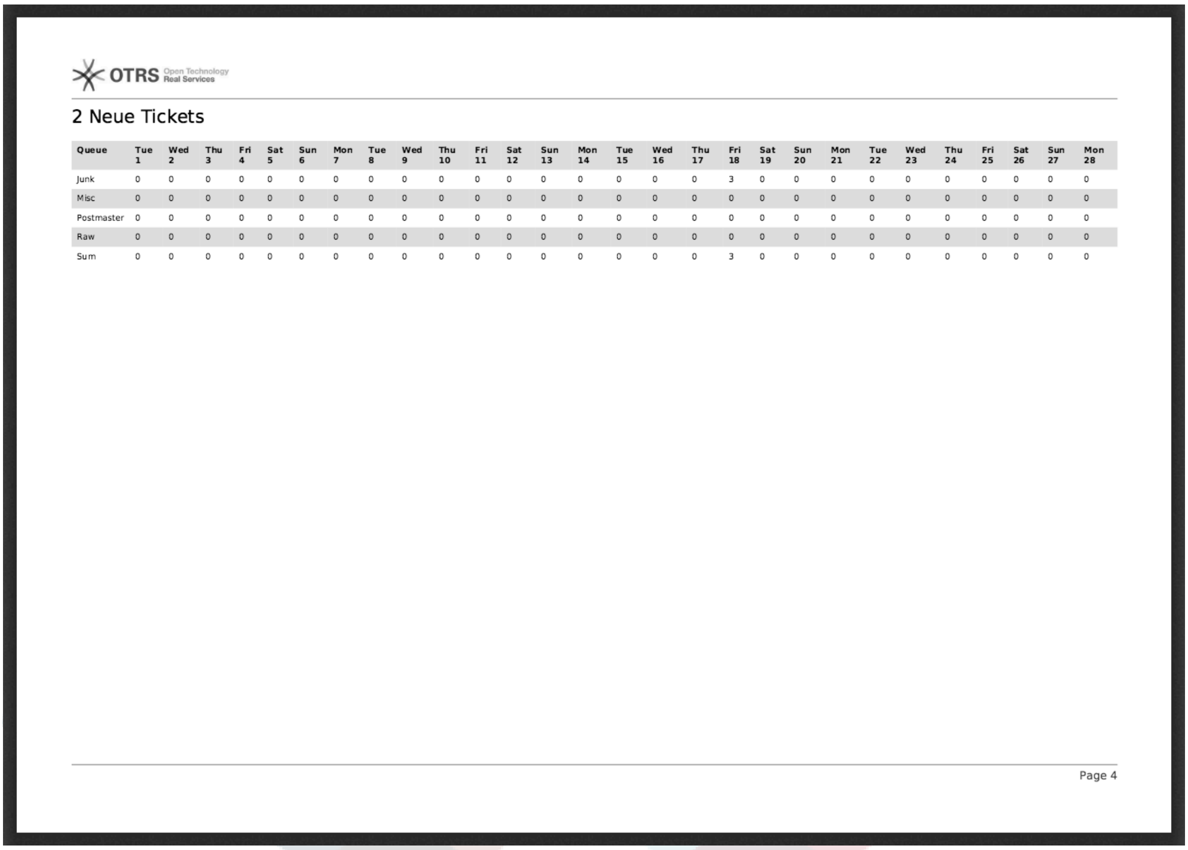
OTRS Open Technology Real Services

1 Confidential data

Please consider all data in this report as confidential and please don't hand it to unauthorized people.

Page 3

Figure 3.43. Relatório: Estatísticas



2 Neue Tickets

Queue	Tue 1	Wed 2	Thu 3	Fri 4	Sat 5	Sun 6	Mon 7	Tue 8	Wed 9	Thu 10	Fri 11	Sat 12	Sun 13	Mon 14
Junk	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Misc	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Postmaster	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Raw	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sum	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Queue	Tue 15	Wed 16	Thu 17	Fri 18	Sat 19	Sun 20	Mon 21	Tue 22	Wed 23	Thu 24	Fri 25	Sat 26	Sun 27	Mon 28
Junk	0	0	0	3	0	0	0	0	0	0	0	0	0	0
Misc	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Postmaster	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Raw	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Sum	0	0	0	3	0	0	0	0	0	0	0	0	0	0

Page 4

9. Resource Planning

9.1. Descrição

Resource planning feature in **OTRS Business Solution**™ complements built-in calendar feature of OTRS. It enhances original calendar implementation by introducing resource allocation for appointments. Furthermore, resources can be assigned to separate teams, which in turn can be used to filter resource overview and availability.

9.2. Configuração

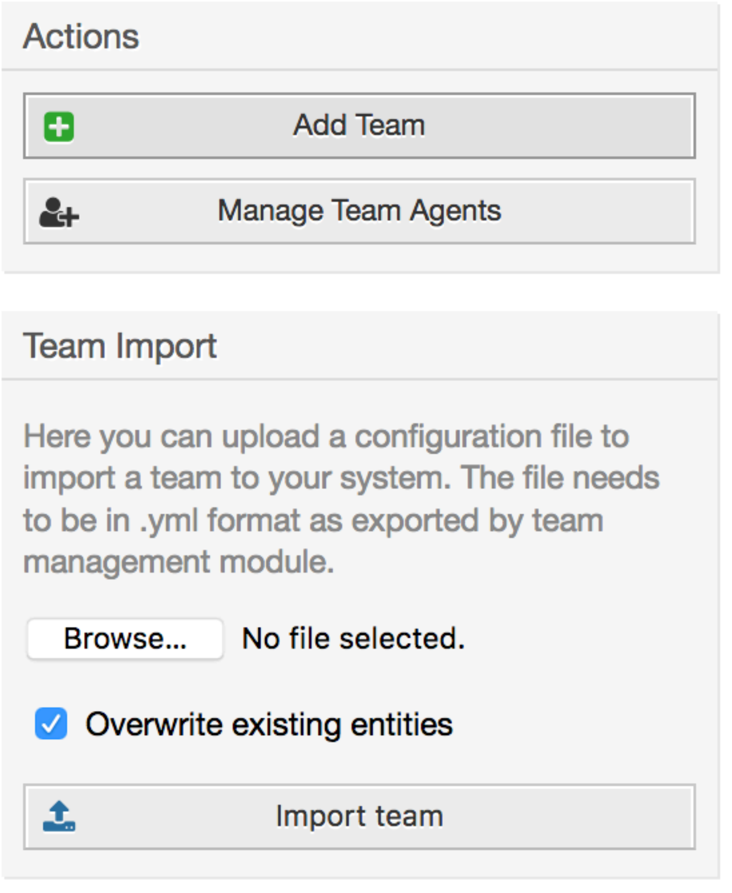
Nenhuma configuração adicional necessária.

9.3. Aplicação

9.3.1. Team Management

In order to be able to assign appointments to resources, you must first define teams for those resources.

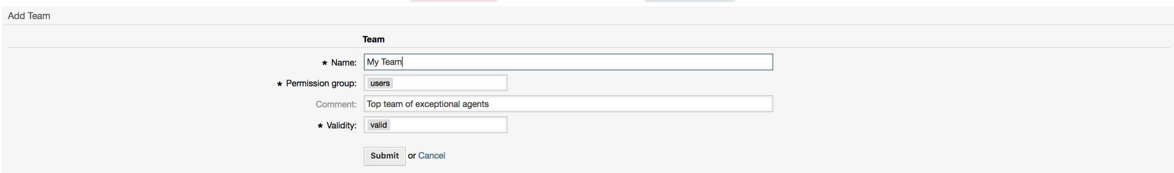
Figure 3.44. Team Management Add and Import



Teams can be added or imported from *Manage Teams* screen accessible via top navigation menu. In order to import a team, you must have an exported YML configuration file of the team from an existing OTRS installation.

Adding new team is easy: just define a team name and permission group. Full access to this group is required for anyone to be able to manage the team, its agents and assign them as resources to appointments.

Figure 3.45. Team Management Add and Import



9.3.2. Team Agent Management

Once you have teams set up, you must define which agents belong to which teams. This is done via dedicated screen where you can adjust relations of agents and teams very much like you can do it for agents and groups.

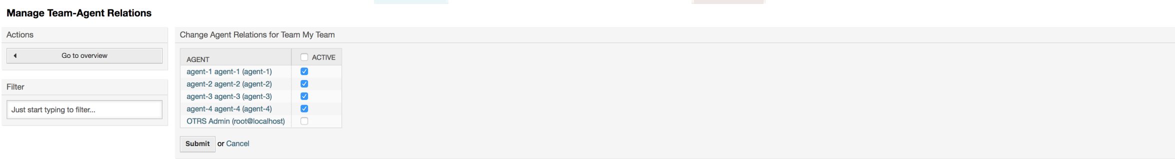
Note

Please note that in order to see agents in this screen, you must define them first via *Admin* → *Agents* screen.

Figure 3.46. Team Agent Management

By choosing a team from this screen, you can assign agents to it, and vice-versa.

Figure 3.47. Team Agent Relations

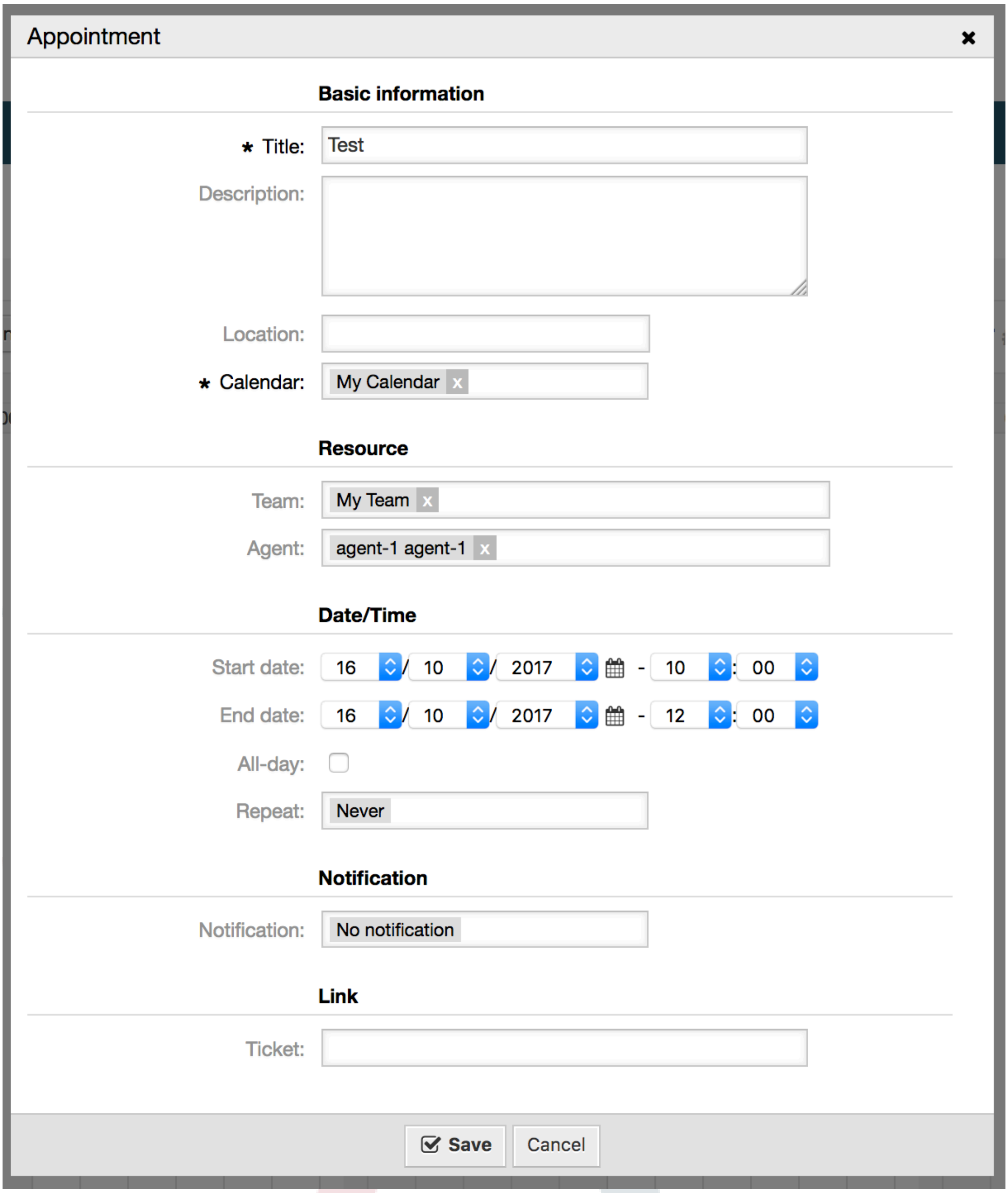


9.3.3. Assigning Appointments to Resources

Finally, once you have both teams and their agents set up, you can proceed to a calendar overview and start assigning appointments to teams and agents.

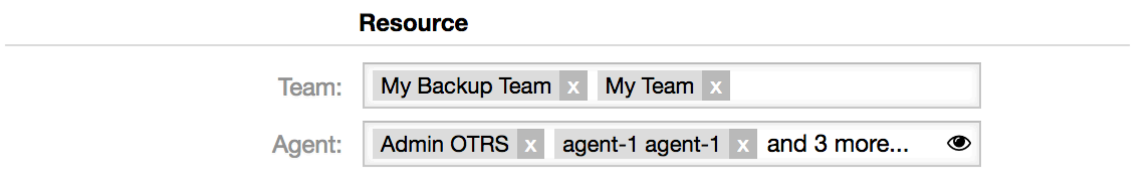
Simply add or edit an appointment, and choose both team and agent from the lists under resource. You can do this via any calendar overview, as appointment edit dialog is the same for all of them.

Figure 3.48. Assigning team and agent to an appointment



You can assign multiple teams and agents to a single appointment, but you must always choose a team first. Resulting list of agents is an aggregate of all selected teams, without any duplicates. Choosing an agent from the list is also optional, so you can leave an appointment assigned only to a team.

Figure 3.49. Assigning multiple teams and agents to an appointment



Note

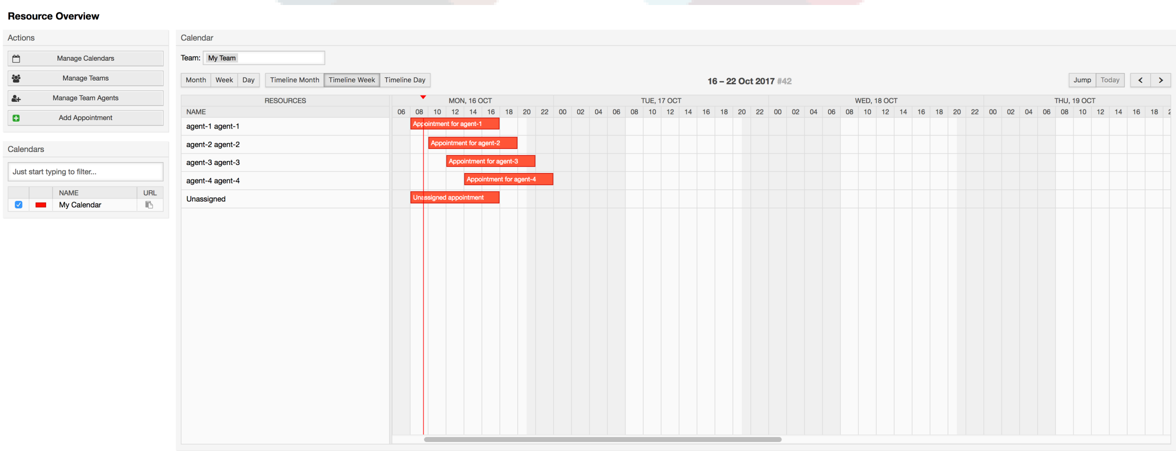
Once you assign an appointment to a team and/or agent, make sure to save it so your changes are applied.

9.3.4. Visão geral de recursos

While it's possible to assign resources to an appointment in any calendar overview, one screen is designed exclusively for allocating resources to appointments: Resource Overview. This screen looks very much like a regular calendar overview, except it has a filter for teams on top and a list of agents for that team (available only in timeline views).

By choosing a team from the top filter, you will be presented with all appointments assigned to it.

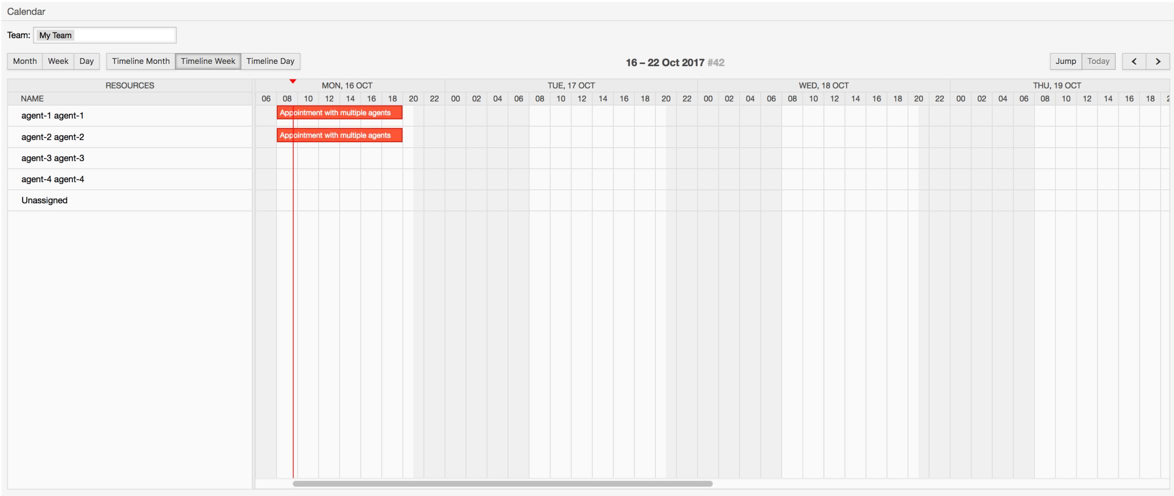
Figure 3.50. Visão geral de recursos



By simply dragging an appointment to a row line with an agent's name in timeline view, it's possible to assign an appointment to this resource. If an appointment does not have an agent assigned to it, it will appear in the unassigned area of the screen.

Appointment with multiple agents will be displayed as duplicated, but it most certainly is not. Dragging one instance of this appointment will move all them in the same fashion.

Figure 3.51. Visão geral de recursos

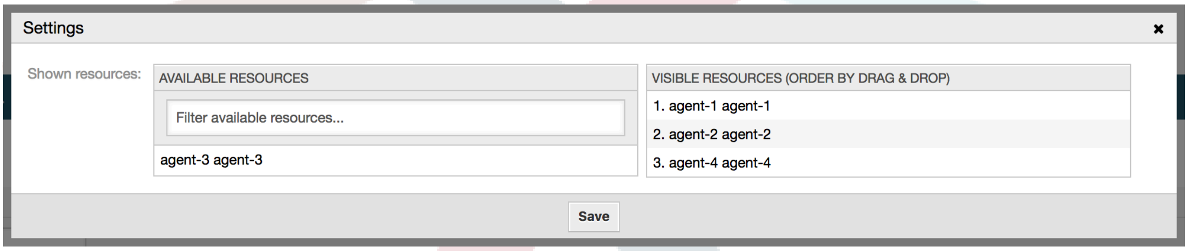


Note

Please note that appointments with unassigned teams or assigned different team than currently selected, will not show up in the resource overview. You will have to switch to a different overview to see these appointments, so make sure to assign them to a correct team first.

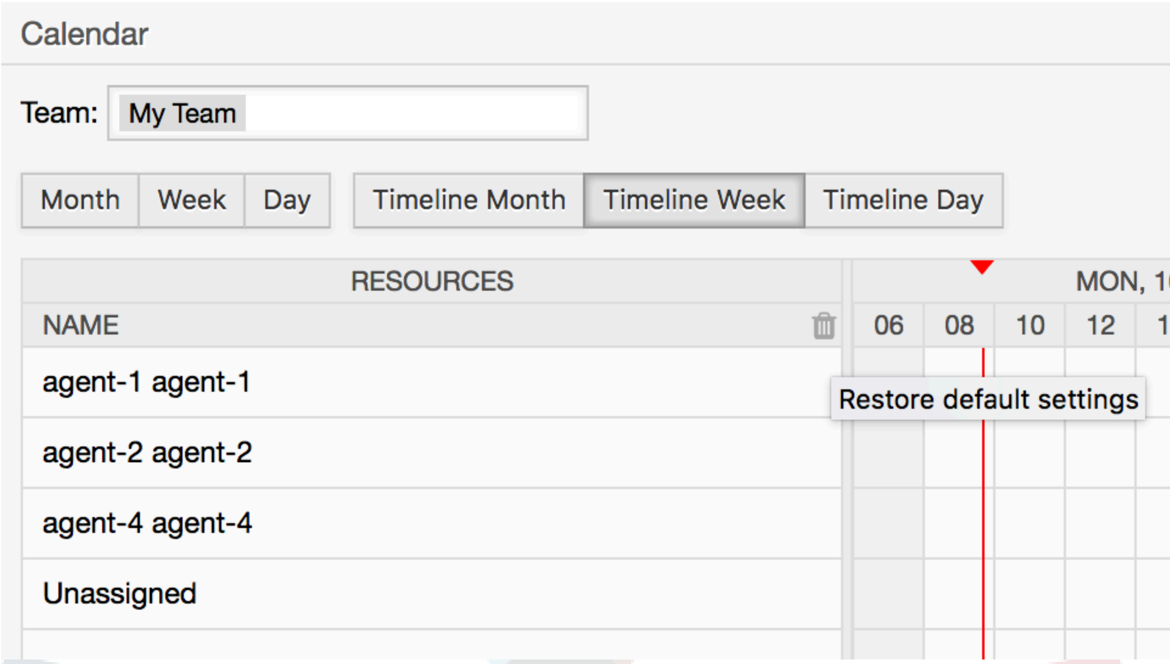
By editing settings of the resource overview (via gear icon in top right corner), you can choose which team agents are displayed within the overview.

Figure 3.52. Resource Overview Settings



This setting is user and team specific, and if you have defined an agent filter in this way, a trash icon will be displayed on top of the list of agents so you can remove it easily.

Figure 3.53. Resource Overview Filter Delete



In all other aspects, resource overview screen behaves in the same way as a regular calendar overview.

10. A seleção do campo da caixa de diálogo do SLA

10.1. Descrição

A caixa de diálogo da seleção de campo permite que você configure as mensagens popup, os clientes devem visualizar quando ele selecionam os SLAs específicos sobre a criação de ticket no cliente frontend. Essas mensagens popup pode conter informações sobre o cliente SLA está prestes a selecionar e lhes dar a responsabilidade de repensar a sua decisão.

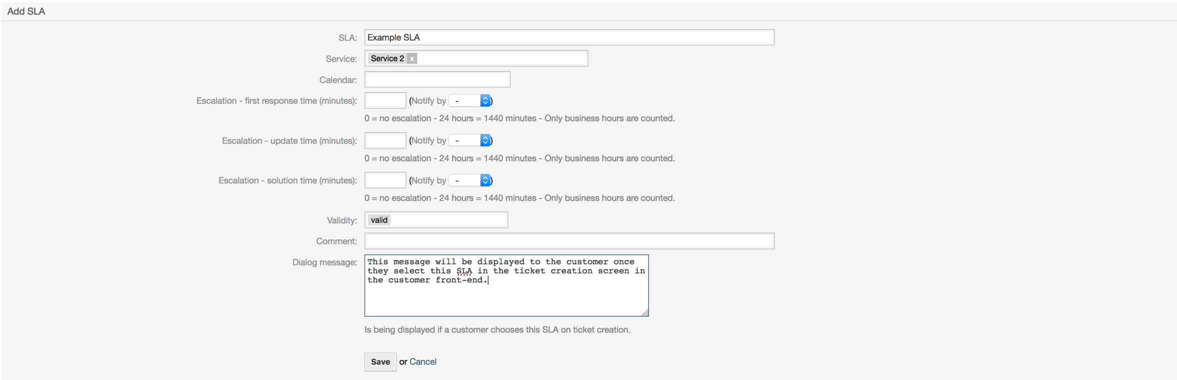
10.2. Configuração

Nenhuma configuração adicional necessária.

10.3. Aplicação

10.3.1. Configurando a mensagem do SLA

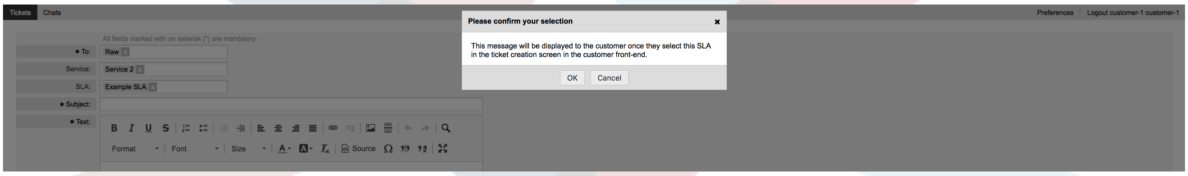
Figure 3.54. Configuração de SLA



Você pode configurar a mensagem sobre cada SLA usando a tela de administração do SLA.

10.3.2. Como observar a mensagem do cliente fron-tend

Figure 3.55. Mensagem do SLA



Isso é o que o cliente vai ver, uma vez que, ele seleciona o SLA esta mensagem é configurada. Ele pode confirmar ou negar a sua seleção, o último redefinirá mais tarde a seleção SLA.

11. SMS Communication Channel

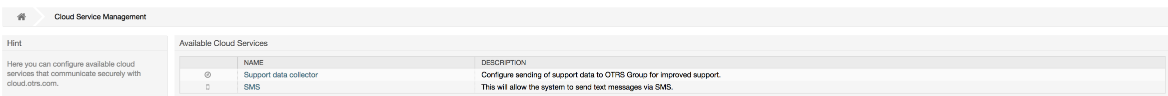
11.1. Descrição

The **OTRS Business Solution**™ brings another communication channel to your OTRS instance: SMS (Short Message Service). It allows you to leverage SMS cloud service to send out messages and store them as article in tickets.

11.2. Activating SMS Cloud Service

Before taking advantage of SMS cloud service, you must first activate it. To do so, please visit the *Cloud Services* screen in Admin interface, and click on SMS entry in table.

Figure 3.56. Cloud Services Screen in Admin Interface

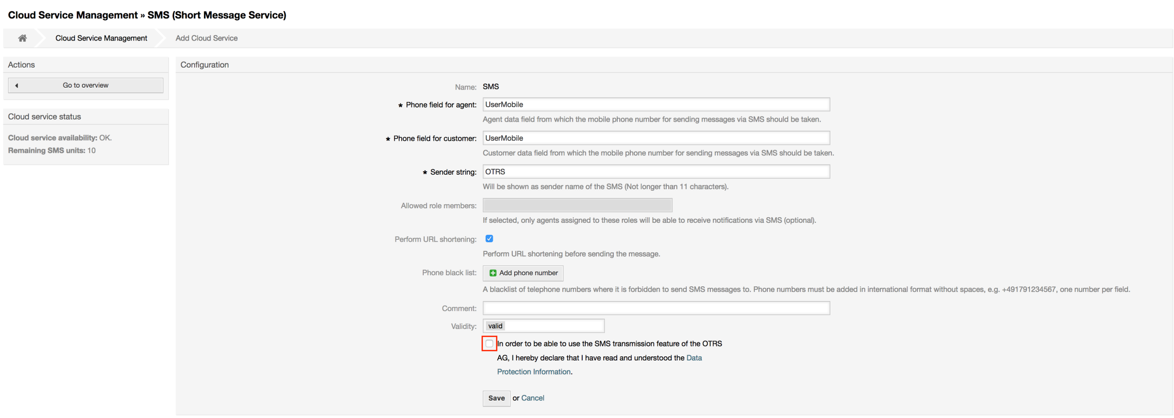


Note

In order to use SMS cloud service, you have to buy an SMS unit package. Please get in touch with sales@otrs.com on this matter. Once you've bought a package, you will be able to look up your current contingent of remaining SMS units in the sidebar of the cloud service configuration screen.

To activate SMS cloud service, make sure to accept the Data Protection agreement by selecting the checkbox.

Figure 3.57. Activating SMS Cloud Service



On this screen, you can also set up some additional parameters of the SMS cloud service, e.g. the sender string which should be used for the SMS text messages or the agent/customer preference field name which should be used to take the mobile phone number from.

Note

If you change value for the customer preference field, make sure to update the configuration options of the address book in the system configuration to reflect this change:

- `CustomerUser::Frontend::AgentCustomerUserAddressBook###SearchParameters###SMS`
- `CustomerUser::Frontend::AgentCustomerUserAddressBook###DefaultFields###SMS`
- `CustomerUser::Frontend::AgentCustomerUserAddressBook###ShowColumns###SMS`

This will make sure your configuration stays in sync and phone numbers can be found/copied from correct fields.

Allowed role members is an optional white list of agent roles whose members will be able to receive SMS notifications. If undefined, all agents will have a possibility of receiving SMS notifications.

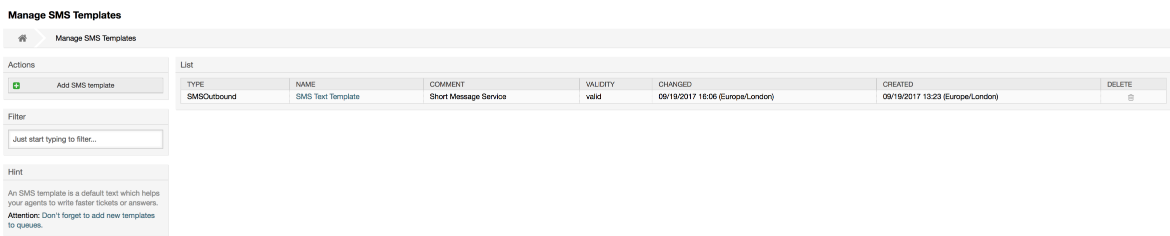
Perform URL shortening checkbox controls the feature of shortening links in SMS texts. If enabled, any link submitted as part of SMS text will be shortened by using OTRS cloud URL shortening service. Links will be shortened only if their length is larger than resulting shortened URL, in order to keep SMS costs down.

By adding specific phone numbers to the *Phone black list*, you can make sure these numbers will never receive any SMS text via cloud service (whether it's a notification or an article). Make sure to input phone numbers in international format, complete with plus sign (+) and country code, without any spaces.

11.3. Configuring SMS Templates

In order to benefit from SMS templates, you must first configure them for specific screens and assign them to correct queues. You can find *SMS template management* screen in the Admin interface.

Figure 3.58. Gerenciar Modelos de SMS



SMS templates behave similar to regular email templates. You define them first, and then assign to queues with which you would like to use them.

Template Type field determines for which screen the template will be visible:

`Answer`

Template will be visible for *Reply via SMS article* action.

`Create`

Template will be visible in *New SMS ticket* screen.

`SMSOutbound`

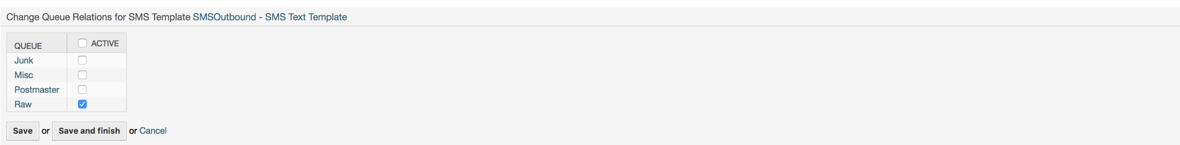
Template will be visible in *SMS Outbound* screen.

Note

`Create` type templates only supports these smart tags: <OTRS_CURRENT_*> and <OTRS_CONFIG_*>.

When you define an SMS template, don't forget to add them to queues. You can do this by following link in the sidebar or via *SMS Templates ↔ Queues* link in the admin interface.

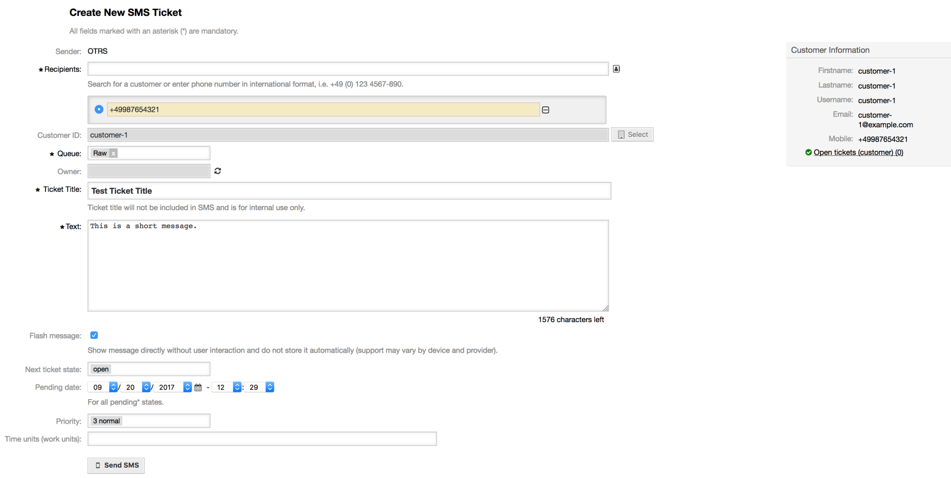
Figure 3.59. Gerenciar Modelos de SMS



11.4. Creating SMS Tickets

To create a ticket with SMS article as a first one, please go to the *New SMS ticket* screen accessible via *Tickets* menu on the main toolbar.

Figure 3.60. New SMS Ticket Screen



This screen behaves similar to new email and phone screens, with some notable exceptions. Instead of email addresses, *Recipients* field accepts only phone numbers in international format, complete with plus sign (+) and country code. You can also search for customer users via this field, provided they have a valid phone number stored in preference field which is configured in cloud service configuration screen.

You may also utilize address book by clicking on small icon next to the recipients field. Search form will allow you to find customer user you are looking for, and add their phone number to the list of recipients.

Note

Ticket Title field will not be included in SMS and is for internal use only. Customer will receive message based exclusively on the contents of the *Text* field.

If you have configured SMS templates of type `Create`, and you have them assigned to currently chosen *Queue*, you will have the option of populating the *Text* field with preconfigured message.

Flash message checkbox controls if message will be showed directly on the device without user interaction and not stored automatically.

Note

Support for flash messages (also known as *Class 0* messages) may vary by device and provider. OTRS cannot guarantee if this flag will be honored by service provider or supported by receiving device.

By clicking *Send SMS* button, ticket will be created with an SMS article, provided SMS cloud service accepted the message. If any errors were encountered, you will be notified, and ticket will not be created.

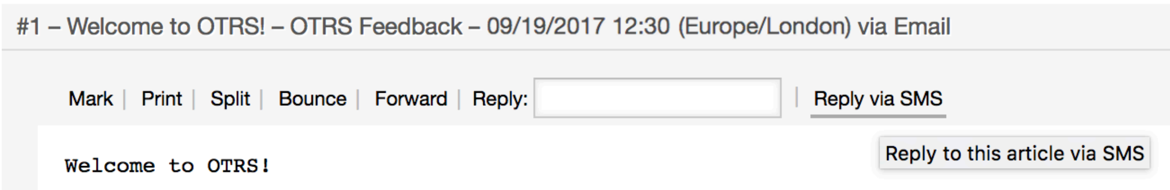
11.5. Creating SMS Articles

To add an SMS to an existing ticket, you can use *SMS Outbound* action on the main ticket toolbar (*Communication* section).

Figure 3.61. New SMS Ticket Screen

If you already have an article, you can also use *Reply via SMS* action on the article toolbar. Simply select the article in question, and either click on the button, or choose name of the template (if you have it configured for this screen).

Figure 3.62. New SMS Ticket Screen



If customer user has defined phone number, it will be automatically inserted in the recipients list. It doesn't matter if article was created in a different communication channel (e.g. Email), it should be correctly recognized and substituted with valid phone number.

Note

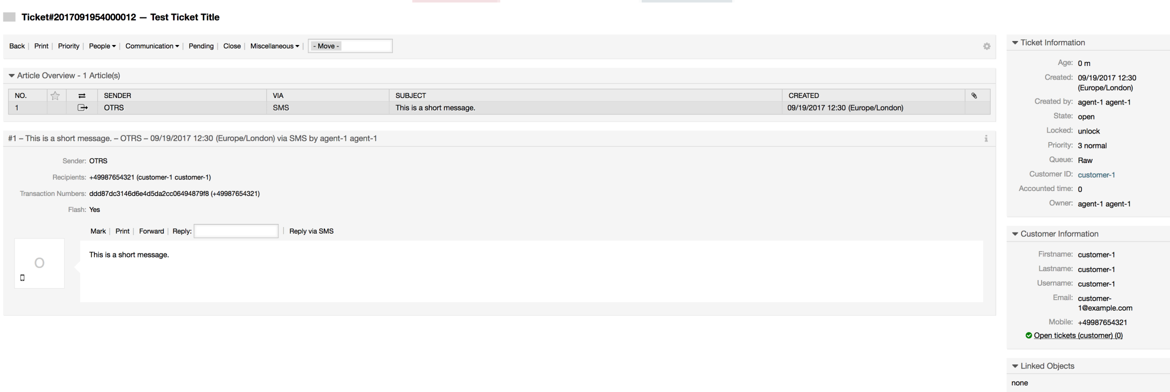
Please note that SMS character counter might not be reflecting the final message size. This is especially true if message text contains OTRS tags or links and URL shorting feature is turned on. Since text replacement will occur during sending of the message, there is no way to guarantee final size, and counter should be taken only for informative purposes.

11.6. Displaying SMS Articles

SMS articles can be displayed as they were sent out right in the ticket zoom screen. Their contents will reflect the final state of the message as queued by the SMS cloud service for sending (with all tags replaced and links shortened).

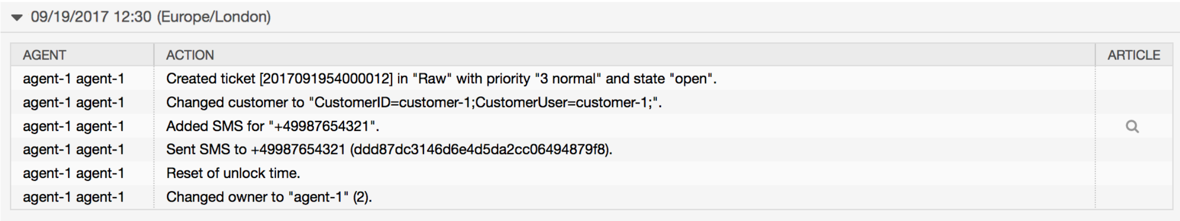
Recipients of an SMS article are listed inside the *Recipients* field. They can be shown in two formats: just phone numbers or phone numbers with name of corresponding customer users. In addition to this field, *Transaction Numbers* will contain a reference message ID mapped to the recipients phone number. These numbers can be used for debugging purposes, since they can be connected to specific messages handled by the cloud service.

Figure 3.63. SMS Article Display



In addition to the article header field, transaction numbers can also be found in *Ticket History* screen. This screen will contain an entry for every message sent out via SMS cloud service, with corresponding transaction and phone number in it.

Figure 3.64. SMS Ticket History Entries



09/19/2017 12:30 (Europe/London)

AGENT	ACTION	ARTICLE
agent-1 agent-1	Created ticket [2017091954000012] in "Raw" with priority "3 normal" and state "open".	
agent-1 agent-1	Changed customer to "CustomerID=customer-1;CustomerUser=customer-1;".	
agent-1 agent-1	Added SMS for "+49987654321".	
agent-1 agent-1	Sent SMS to +49987654321 (ddd87dc3146d6e4d5da2cc06494879f8).	
agent-1 agent-1	Reset of unlock time.	
agent-1 agent-1	Changed owner to "agent-1" (2).	

12. Visualização geral do artigo em anexo

12.1. Descrição

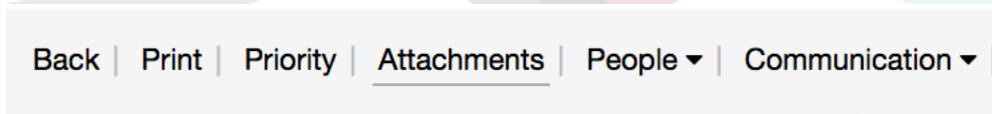
O artigo em anexo permite que você visualize uma lista de todos os tickets. Os anexos serão listados por atributos tais como, nome de arquivo, tipo de arquivo, tamanho, data da adição a quem o artigo pertença. A partir da tela de descrição geral, você pode fazer o download de certos anexos ou criar um arquivo que contém vários ou todos os anexos do ticket que você está exibindo.

12.2. Configuração

Nenhuma configuração adicional necessária.

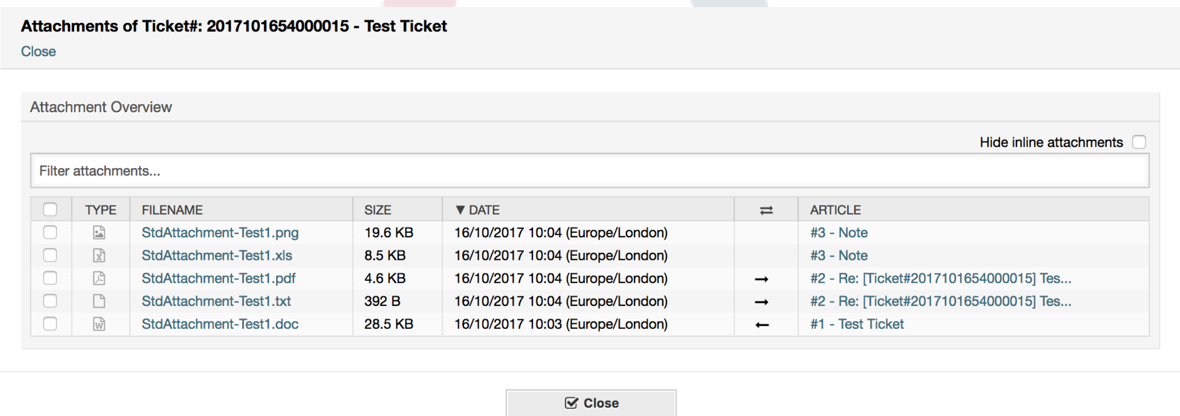
12.3. Aplicação

Figure 3.65. Mudando a visualização geral do artigo em anexo



Once a ticket has at least one attachment, the *Attachments* menu item will be displayed in the ticket zoom screen. Clicking it will open a popup which contains a list of all attachments.

Figure 3.66. Aproveitando a visualização geral do artigo em anexo



Attachments of Ticket#: 2017101654000015 - Test Ticket

Close

Attachment Overview

Hide inline attachments

Filter attachments...

	TYPE	FILENAME	SIZE	▼ DATE	⇄	ARTICLE
		StdAttachment-Test1.png	19.6 KB	16/10/2017 10:04 (Europe/London)		#3 - Note
		StdAttachment-Test1.xls	8.5 KB	16/10/2017 10:04 (Europe/London)		#3 - Note
		StdAttachment-Test1.pdf	4.6 KB	16/10/2017 10:04 (Europe/London)	→	#2 - Re: [Ticket#2017101654000015] Tes...
		StdAttachment-Test1.txt	392 B	16/10/2017 10:04 (Europe/London)	→	#2 - Re: [Ticket#2017101654000015] Tes...
		StdAttachment-Test1.doc	28.5 KB	16/10/2017 10:03 (Europe/London)	←	#1 - Test Ticket

Close

13. Verificar o cronograma do ticket

13.1. Descrição

O cronograma de visualizar o ticket oferece uma visão cronológica de todas as ações que aconteceu no ticket (Que inclui artigos, alteração de proprietário, entradas de e-mail, etc.). Com o cronograma de visualizar o ticket, os agentes são capazes de obter uma ótima contemplação de um ticket em menos tempo.

13.2. Configuração

Configuração do Sistema

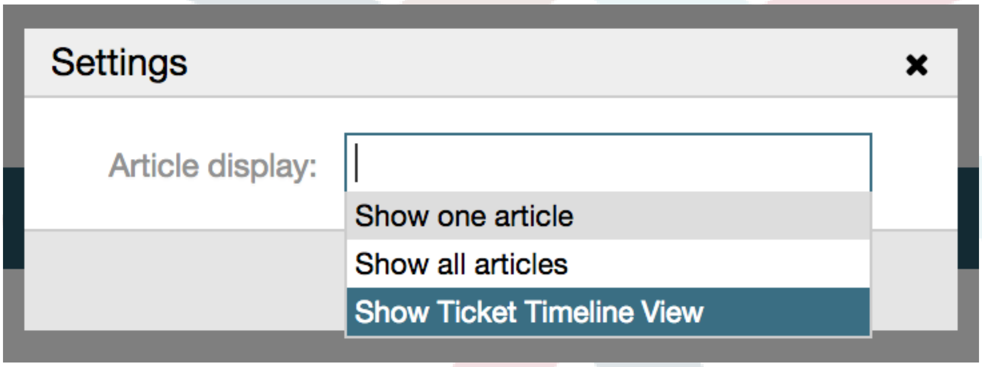
`ChronicalViewEnabled`

Group: `OTRSBusiness`, Subgroup: `Frontend::Agent`

Controla-se ou não o ticket verificando se está ativada a cronologia da chamada.

13.3. Aplicação

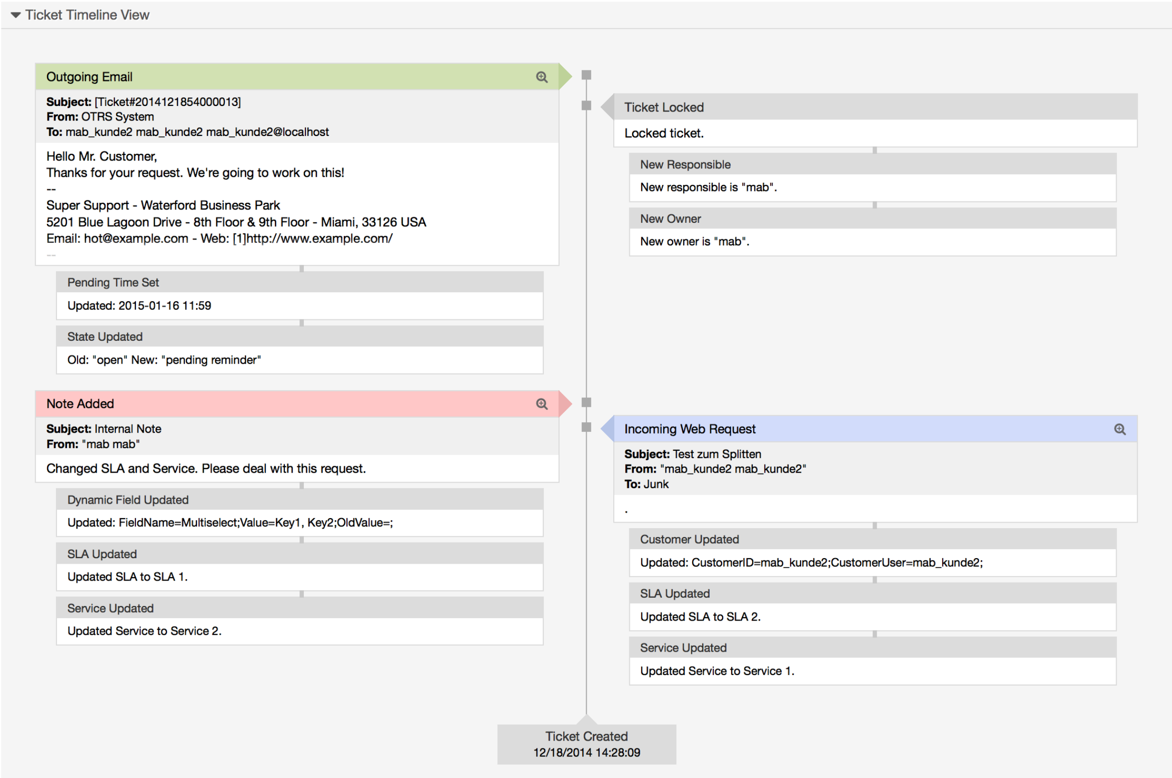
Figure 3.67. Alternar o ticket, verificando a cronologia do chamado



To access the ticket timeline view, use the clock icon on the top right corner of the article widget in the ticket zoom screen. You will be redirected to the timeline view and this view will be kept as preference until you change back to another view.

No cronograma de exibição do ticket, você pode trabalhar no ticket como você está habituado. Você pode monitorar o tempo de cada evento na escala, passando o pequeno quadrado ao lado de cada evento com o cursor do mouse. Você pode exibir o conteúdo completo de artigos, usando o ícone de zoom na parte superior da caixa de certos artigos, onde você vai encontrar todos os artigos comuns como ações a frente de resposta, split, etc.

Figure 3.68. Usando o ticket, verificando a cronologia do chamado



14. System Configuration User Specific Settings

14.1. Descrição

This functionality allows agent users to define their own values for some system configuration settings. These values can be defined in the user preferences section in the new *Advanced* pane.

Administrators are able to review the user defined values for those settings and reset them if necessary and to forbid or allow user modifications on specific settings.

14.2. Configuração

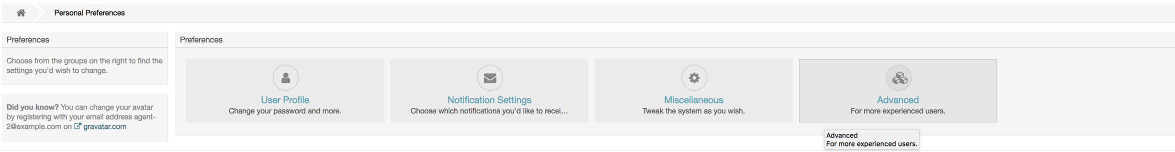
Nenhuma configuração adicional necessária.

14.3. Aplicação

14.3.1. Set user specific value

Every agent can define a value for a setting using the *Personal preferences* screen. Once you are in this screen, select the *Advanced* option in the preferences panel.

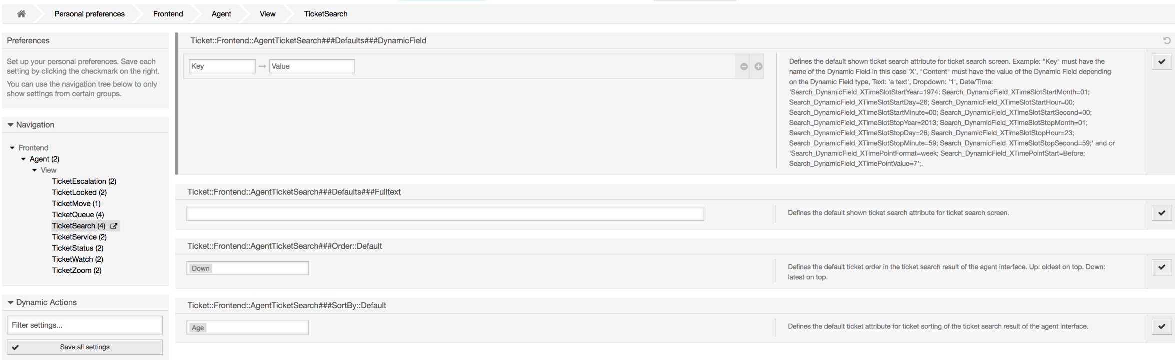
Figure 3.69. Accessing the user specific settings



Using the navigation widget in the left side bar, select the desired group of settings. Then you can change the value for a specific setting and save it using the *check mark* button in the right side of the setting widget.

Once you modified a value, it is possible to revert this change using the *Reset to default* icon button present in the right top corner of the modified setting widget.

Figure 3.70. Reverting a setting to default value

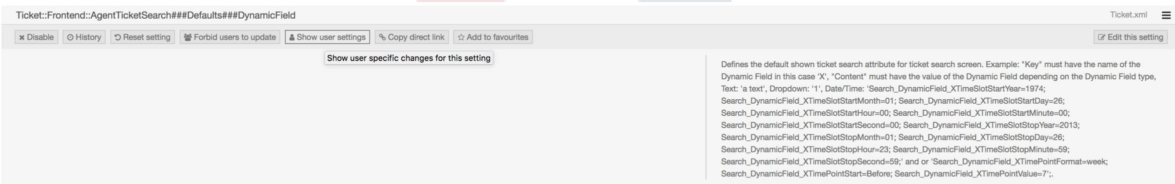


14.3.2. Review user specific settings

When a setting is available for user modification, all users are able to set their own values. Depending on the nature of the setting, values can be very different among users, and also compared to the original global value. This package includes an administrative tool to review and delete user set values if needed.

Click on the *Show user settings* button from the alternative menu on the settings that are enabled to show the *Review users setting values* screen.

Figure 3.71. Access to user values of a particular setting



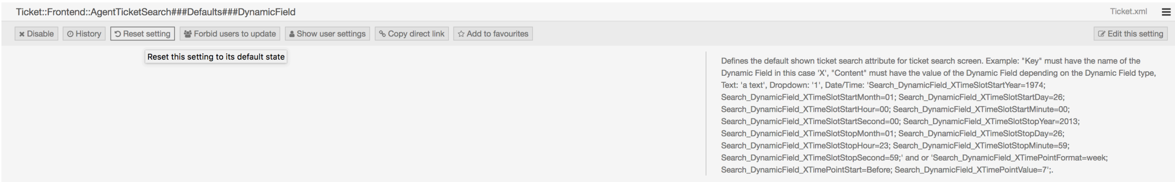
On this screen all of the user specific values for the selected setting will be shown. To delete a single value click on the trash can icon in the right corner of every setting widget, or delete all user values for this setting by clicking on the trash icon in the outer setting widget.

Figure 3.72. Usage of the user specific values screen

14.3.3. Reset globally and locally

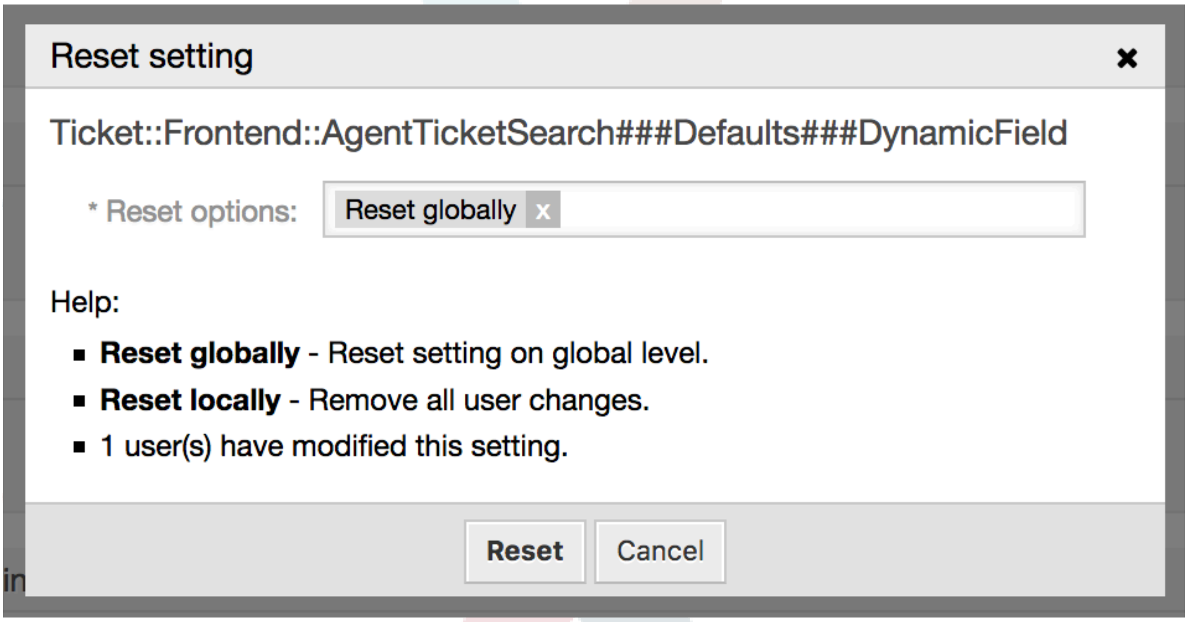
For the settings that are enabled to hold user values *Reset setting* feature has been enhanced to either reset the setting completely or just the user values.

Figure 3.73. Access to the setting reset dialog



Clicking on the *Reset setting* button will display a dialog showing the possible reset options.

Figure 3.74. Choosing the reset scope



15. System Configuration History

15.1. Descrição

This added functionality provides administrators with screens to go through system configuration deployment and specific settings history, and make changes if needed.

15.2. Configuração

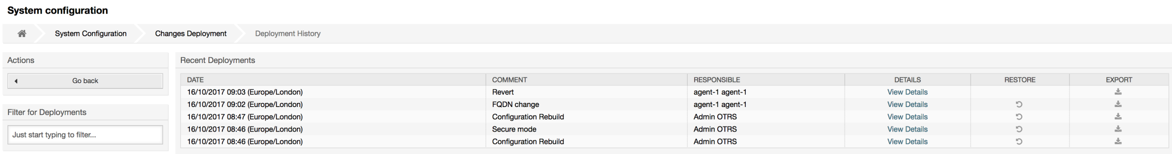
Nenhuma configuração adicional necessária.

15.3. Aplicação

15.3.1. Deployment History

To access deployment history, go to *System Configuration* → *Deployment* screen and click on *History* button. This screen will display recent deployments in a descending order, along with their comments and name of the user who deployed the changes.

Figure 3.75. System configuration deployment history



Every deployment can be further inspected by clicking on *View Details* link next to it. *Details* screen can be used to compare the setting with its previous value, before the deployment took place.

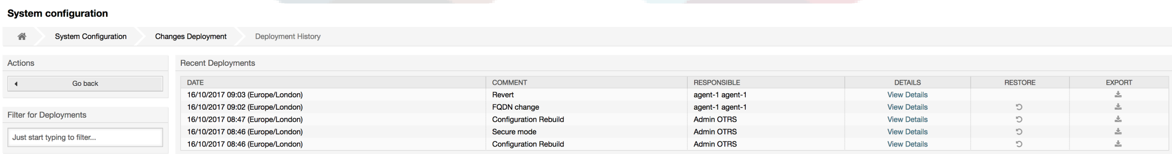
Additionally, older deployments (every one before current state) can be restored with a simple click. By restoring a deployment, all settings will be reverted to the value they had at the time of the deployment in question.

Finally, deployments can be exported with click on the export button. User will be presented with a download of a YML file that contains changed settings. This YML file can be later restored via *Import & Export* screen in the system configuration screen.

15.3.2. Setting History

Specific setting history can be accessed via *History* button in the setting widget. This button opens a screen of all values setting had over different deployments. Information like name of the user that made the change and time of change is displayed, along with a useful comparison tool.

Figure 3.76. System configuration setting history



Every historical setting value can be restored by clicking on the *Restore* button in upper right corner.

Appendix A. Recursos adicionais

otrs.com

O website OTRS com código-fonte, está disponível notícia e uma documentação www.otrs.com. Aqui você também pode encontrar informação sobre serviços profissionais e OTRS Administrador do seminário de formação em grupo OTRS, o criador de OTRS.

Tradução

Você pode traduzir o OTRS no seu idioma em Transifex.