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1.1 Login to Agent Interface

The agent interface is available at the following location.

https://<OTRS_HOST>/agent

**Note:** You have to replace `<OTRS_HOST>` with your domain.

You need an agent account to be able to use OTRS. If you do not have an account yet, please contact your administrator.

Depending on the system configuration, the agent may have to change the initial password at first login.

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

For security reasons, two-factor authentication has to be setup for each agent when they login for the first time. Click on the *Setup* button to setup this security feature.

The two-factor token will be sent to the email address of the agent, or the agent can use an authenticator application.

1.1.1 Email Authentication

Selecting the *Send signed and/or encrypted email if possible* option activates opportunistic encryption of the email containing the two-factor token when sent. This feature will work only if either a PGP or S/MIME subsystem is activated and if there is a public key or certificate available for the agent’s target email address. Otherwise the email will be sent in plain text.

Check your mailbox and find the email containing the two-factor token. The token consists of numbers. Type the token into the next window.

This setup can be changed in the *Security* section of the *Personalization* menu after the successful login.
Fig. 1: Agent Login Screen
1.1. Login to Agent Interface

Fig. 2: Change Initial Password
Follow these steps to request a new password:

1. Enter your username below and click "Request New Password".
2. Check your email client and follow the instructions provided in the email.

* Username

Please enter your username

[Cancel]  [Request New Password]

Fig. 3: Request New Password Screen
Two-factor Authentication

Protect your account with two-factor authentication. Please choose your preferred method to sign in.

- Authenticator App
  - Setup
- Email
  - Setup

Cancel

Fig. 4: Two-factor Authentication
Fig. 5: Two-factor Setup for Email
Fig. 6: Two-factor Setup Email Verification
1.1.2 Authenticator App

The agent can use an authenticator application for two-factor authentication. All information is displayed in the setup page.

The successful setup needs an initial verification.

This setup can be changed in the Security section of the Personalization menu after the successful login.

1.1.3 First Login

After a successful login, the agent dashboard will be displayed.

Congratulations! You are now able to use the OTRS system.

1.2 Navigation And Usage

OTRS has a modular structure. All of its objects, lists, widgets and overviews are configurable components, but the configuration should be done in the same manner. This chapter explains the general usage of the OTRS agent interface.

The agent interface acts as a dashboard for the agents. This is a complex screen where most of the actions are accessible.

1.2.1 Navigation Elements

On the left side of the screen, there is a sidebar called the organizer. The organizer contains the personal settings of the current agent and shortcuts to business object lists. There is a small arrow icon to expand the organizer. The expanded organizer shows the organizer item names next to the icons. The organizer items can be customized in the Personalization menu.

The organizer is hidden by default when using OTRS on a mobile device.

Hovering the mouse over a business object list icon in the organizer sidebar opens a preview of the according business object list.

At the top of screen is the header bar that has the most important menus. This part of the screen is visible on every page.

The main menu, accessed by the three horizontally stacked lines on the left side of the header bar, contains links to the most important screens within the system.

In the center of the header bar, the notification menu, the search field and the action menu can be found.

**Notifications**
Clicking on the bell icon will show the currently unread notifications. There is a Show All button that opens the notification list from which you can select any previous notification.

**Search**
Clicking on the magnification glass icon will display a search bar, allowing you to search for everything in the system.

**Action menu**
Clicking on the plus icon will open a menu to create new business objects.
Two-factor Setup

Please open your preferred two-factor authenticator app, add a new account and scan the code below.

How do I get the app?

1. Go to your app store.
2. Search for an "Authenticator" app.
3. Install and open the app.
4. Follow the instructions on the screen to add a new account.
5. Scan the code below.

Unable to scan the code?

Cancel  Next

Fig. 7: Two-factor Setup for Authenticator App
Two-factor Setup

Please enter the 6-digit code that is displayed in your two-factor authenticator app.

Enter code

Cancel  Verify

Fig. 8: Two-factor Setup Authenticator App Verification
1.2. Navigation And Usage

Fig. 9: Personal Dashboard

Fig. 10: Personal Dashboard
Fig. 11: Business Object List Preview

Fig. 12: Main Menu

Fig. 13: Header Toolbar
Below the header bar, the breadcrumb bar is located. This helps to easily identify where the agent currently is, and it can also display toolbars or actions. The breadcrumb bar consists of two rows, and both rows have icons on the left and right sides.

![Fig. 14: Breadcrumb Bar For Business Object List](image1)

![Fig. 15: Breadcrumb Bar For Business Object Detail View](image2)

The first row of the breadcrumb bar contains the breadcrumb itself, which acts as a path indicating the current place where the agent is. On the right side of this row, the screen configuration is located. This part of the breadcrumb bar can contain buttons for navigation between business objects as well as a back link to return to the business object list.

The second row of the breadcrumb bar can be different for business object lists and business object detail views.

- For business object lists, the second row of the breadcrumb bar can contain export and bulk actions on the left side; filter presets, filter possibilities and pulse mode are on the right side.
- For business object detail views, the second row of the breadcrumb bar can contain the Actions menu and a Scroll To menu related to the business object; the column layouts and a button to show or hide the sidebar of the business object detail view are located to the right.

These features and actions are displayed only if the selected business object list or business object has such a menu.

The screen configuration is accessible via the gear icon. Every screen has such a menu. The configuration settings that are available depend on the screen that is being configured.

The same configuration screen can be used for all column layouts.

Select the layout you want to edit in the top of this screen. Next, the widgets of the current screen can be added, removed or rearranged. Any widget can be added multiple times. Each widget has its own settings.

For large screens, different column layouts can be selected. On small screens or in the mobile view, only the one column layout is available. The position of the widgets can be customized in the screen configuration settings.

Some business object detail views, like the detail view for Tickets, can contain a sidebar on the right side of the screen. This sidebar can be toggled from the breadcrumb bar.

The content area of the screen can display a dashboard, business object list or business object detail view. These screens can contain a list of business objects or multiple widgets. The number of the widgets and the content of the widgets depend on the screen that the agent currently sees. Every widget can be customized by using its widget configuration settings.

In the bottom right corner, the chat bubble is displayed. The chat bubble is always visible on top of any other elements to give quick access to Chat.
Fig. 16: Screen Configuration For Two-column Layout
1.2.2 Business Objects

All components in OTRS are called business objects. Business objects can be:

- Appointments
- Configuration items
- Customers
- Customer Users
- Knowledge Base Articles
- Service level agreements
- Services
- Statistics and Reports
- Tickets
- Other similar objects

The business objects have list views and detail views. The views have a similar structure and user experience.

1.2.3 Business Object Lists

The business object list displays a configured set of data containing business objects.

Fig. 17: Business Object List Example
If there are more items, a note at the end of the list informs the user about how many more items there are that cannot yet be displayed. By scrolling down, the business object list automatically loads more items until the end of the list is reached. The visible size of the list is remembered for reloads and navigation.

The page breadcrumb indicates the total number of found business objects depending on the filter criteria for the business object list.

The business object lists periodically check on the server side for data updates. For the list updates, default mode and pulse mode are available. You can activate this mode by clicking the pulse icon in the breadcrumb bar of business object list.

In default mode, new items that have to be shown in the currently displayed list are not shown immediately. A notification on the top of the business object list informs the user that new data is available. Clicking on this notifications refreshes the list and shows the list with updated data.

In pulse mode, updates to an item displayed in a business object list are applied immediately. The business object list will be refreshed periodically, including newly added or removed items. The rows associated with the affected objects are highlighted for a short time to indicate a change. If the update affects an item that is no longer to be displayed in the current list, the corresponding item is highlighted in red, and after a few seconds, it will be removed from the list.

The columns of the business object lists can be sorted and resized. Clicking on any column that is visible and can be sorted replaces the current sorting criteria and re-sorts the data based on the column’s data. A sorted column is indicated by bold text and a small arrow in the column heading. You can resize any column with the handle in the right side of the header.

The business object list can support exporting and editing of multiple objects at once. The export feature allows a user to export one or more objects selected in the business object list, and the bulk edit feature allows the user to edit the properties of the selected objects at one time.

To export the objects:
1. Select one or more object in the business object list.
2. Click on the download icon in the breadcrumb bar.
3. Add, remove or rearrange the columns and select the export format.
4. Click on the Download File button.

To edit the properties of the objects:
1. Select one or more object in the business object list.
2. Click on the pen icon in the breadcrumb bar.
3. Change the properties of the selected objects.
4. Click on the Execute Bulk Action button.

The business object list supports inline editing of objects. Not all properties can be edited inline.

To edit a property of an object:
1. Hover the mouse over the property value in the list and wait for the popover field.
2. Change the value of the property.
3. Click on the Save button.

It is possible to select all objects that are currently visible in the list. To do this, select the checkbox in the table header.
Fig. 18: Business Object List Export
Bulk Action

- Change Properties
- Link Tickets
- Merge Tickets
- Write Email
- Write Note

Unlock after bulk execute

Cancel  Execute Bulk Action

Fig. 19: Business Object List Bulk Action

Fig. 20: Business Object List Inline Edit
Note: If the list contains more objects than could be displayed, the non-visible objects are not selected.

To select all objects that are currently not visible:

1. Scroll down the list to display all objects.
2. Scroll up and select the checkbox in the table header.

The table header will display how many objects are selected.

The business object lists have a screen configuration and a non-permanent configuration that can be set by using the filter functions. The screen configuration of a business object list can be configured using the cog wheel icon in the upper right corner. The non-permanent screen configuration is never saved or synchronized, but allows for the saving of named filter presets.

In the screen configuration, the columns displayed in the business object list can be added, removed or rearranged. The list can be sorted and filtered, and the number of results to be displayed can be selected. This number of objects will be loaded the first time the list is displayed and for each time the list is scrolled down.

The filter section allows users to manage which filters are applied and to narrow the list of business objects. It is also possible to save a configured filter setup as a filter preset. The saved filter preset and the filter section are available using the filter icon in the breadcrumb bar.

The filter section will be opened on the right side of the screen next to the business object list.

New filter presets can be created and existing filter presets can be updated or deleted.

To create a new filter preset:

1. Click on the New button.
2. Configure a filter setup by adding some filters.
3. Enter a name for the filter preset.
4. Click on the Save button.

When a filter is selected, a new filter field will be displayed to select another filter. There is a huge list of possible filters, and there is no limitation for the number of used filters. There are filters that use a text input field and other filters that have a drop-down list to select only one or multiple options.

The filters can be removed with the trash icon next to the field.

1.2.4 Business Object Detail Views

Clicking on an object in the business object list opens the detail view of the object. The detail view remembers the context of the business object list. If you go back to a business object list from a detail view, the business object list is opened again and the object is highlighted, if it still exists.

The business object detail view has an Action menu in the breadcrumb bar. The number of actions depends on the configuration and the type of business object. Each action opens a dialog in the right side of the screen, which contains a form for the selected action.

The content area of the business object detail view consists of widgets that hold the main content. The widgets can be displayed in one, two or three column layouts. The number and type of the widgets depend on the displayed business object and can be customized in the screen configuration.
Edit Screen

* Hide/Show Columns

- Live People
- Number
- Title
- Priority
- Created
- Age
- Changed
- Pending till
- Escalation Time
- Update Time
- First Response Time
- Solution Time
- Sender
- Subject
- State

* Sort List

Sort first by

Changed (descending)

+ Add New Sorting

Filter List

- Located in my queues

+ Add New Filter

* Number of Results

25

Cancel  Save

Fig. 21: Business Object List Screen Configuration
Use the *Scroll To* menu in the breadcrumb bar to jump quickly to the selected widget. This menu contains all widget names that are visible on the screen, and it has the same layout as the widgets that are configured in the screen configuration.

Each widget has a header with the name of the widget and a chevron icon to collapse or expand the widget itself. The *Select Preset* option shows the configured and named filter from the *Filter* section. Finally, the widget configuration is located in the right side of the header.

The content of a widget can be a table, a content area, or can consist of multiple content cards. Tables can be sorted and resized like the business object lists.

Most of the widgets have a filter possibility to narrow the results displayed in the widget’s content. The filter options can be shown or hidden with the filter icon.

**See also:**

The widget filters work in the same way as the business object list filters, and they are displayed on the top of each widget. The widget filters also support filter presets.

The widget configuration is accessible via the gear icon. Every widget has such a menu, and the content of this setting depends on the widget.

The following configuration options can be available for the widgets. The configuration options depend on the widget. The fields marked with an asterisk are mandatory.

**Widget Title**

Here, the default name of the widget can be changed. If a new name is entered, this name will be displayed in the header of the widget.
Fig. 23: Business Object List Filter
Fig. 24: Business Object Detail View Example

Fig. 25: Business Object Detail View Actions

1.2. Navigation And Usage
Fig. 26: Widget Overview

Edit Widget Configuration

- **Widget Title**
  - Name your widget

- **Article View Type**
  - collapsed

- **Hide/Show Columns**
  - Direction
  - Channel
  - Sender
  - Subject
  - Created
  - Article Properties
  - Attachment

- **Sort List**
  - **Sort by**
    - Created (descending)

- **Filter List**
  - Please select your filter
    - Select Filter

- **Number of Results**
  - 25

Fig. 27: Widget Configuration

#1 Welcome to OTRS! We're glad that you've selected OTRS as your service management solution, and we look forward to helping you maximize your use of the system. To get started, we wanted to share the following resources: - OTRS...
Hide/Show Columns
In this list, columns which should be visible in the widget can be selected. This applies only if the widget content is displayed in a table form.

Show Lists
In this list, cards which should be visible in the widget can be selected. This applies only if the widget content is displayed as content cards.

Sort List
Here, order criteria and the sorting for the content of the widget can be selected.

Some widgets support only one sorting criterion, while other widgets can support up to three criteria. If more criteria is available, you can add a new one with the + Add New Sorting link until the sorting limit is reached.

Filter List
Here, filter criteria for the content of the widget can be selected.

Any available filter options can be selected at the same time. You can add a new one with the + Add New Filter link.

Number of Results
Here, the number of entries that will be loaded the first time the list is displayed and for each time the list is scrolled down can be defined.

As you can see, working with the agent interface is quite easy and intuitive thanks to the modular design of OTRS. The next chapters explain the special features and usages available to the specific business objects.

1.3 Personalization

The personalization menu contains general settings for the agent account, security possibilities to protect this account by using a password and two-factor authentication, notification settings, chat availability states and an editor to customize the organizer.

The personal preferences can be set via the avatar image in the top left corner of the organizer sidebar.

Every menu item has a search box in the top of the widget to search for a specific setting.

1.3.1 User Profile

This menu item contains general settings for the agent account.

Avatar
Here, the image used as an avatar image can be changed. It is possible to upload an avatar image directly, or you can register your email address on Gravatar to use this feature. Otherwise the first letters of the agent’s first and last name will be displayed.

Note: The file size should not exceed 1 MB for an uploaded image.

Language
Here, the language for the user interface can be selected.

Only those languages for which the translation completeness is at least 95% are listed by default. To see all available languages, click on the globe icon next to the drop-down list.
Fig. 28: Personalization
See also:
Translation status of incomplete languages is low, but you can help to improve the translation at https://translate.otrs.com/.

Style
Here, the style which should be used for the user interface can be selected. For some styles, the Variant can also be chosen.

Time Zone
The time zone used by the user interface to display time values can be selected here. Just start typing the name of the capital city of your current location.

Date Time Format
Here, agents can select how the date and time are displayed.

Out of Office Time
Use the calendar entries to set the start and the end date for your out of office days. Multiple entries can be added here.

When you have finished updating the settings, press the Save button.

1.3.2 Security
This menu item contains the settings to protect the agent account.

Change Password
Here, the current password of the agent can be changed by entering the old and the new passwords.

Two-factor Authentication
Here can be added an additional authentication method, which is called two-factor authentication. Two-factor authentication acts as a second password to protect the account. While the normal password is something that the agent has to know, the two-factor token is something that the agent has to own.
This means, if an agent enters the username and the password, then a token will be sent via email, SMS, or via a pre-configured authenticator application.

To pick a two-factor authentication method:
1. Click on the Setup button.
2. Enter your current password.
3. Follow the instructions you see on the screen.

This setting uses the same steps that are already explained in the Login to Agent Interface chapter.

1.3.3 Notification Settings
This menu item contains the settings related to notifications.

My Queues
Here, the agent’s preferred queues can be selected.

My Services
Here, the agent’s preferred services can be selected.

My Chat Channels
Here, preferred chat channels can be selected.
Ticket Notifications

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

<table>
<thead>
<tr>
<th>Ticket Notifications</th>
<th>all/none</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket create notification</td>
<td>✉️</td>
</tr>
<tr>
<td>Ticket follow-up notification (locked)</td>
<td>✉️</td>
</tr>
<tr>
<td>Ticket follow-up notification (unlocked)</td>
<td>✉️</td>
</tr>
<tr>
<td>Ticket lock timeout notification</td>
<td>✉️</td>
</tr>
<tr>
<td>Ticket queue update notification</td>
<td>✉️</td>
</tr>
<tr>
<td>Ticket service update notification</td>
<td>✉️</td>
</tr>
</tbody>
</table>

* To activate this notification, at least one transport method must be activated.

Fig. 29: Ticket Notifications Widget

The possible methods are Email, Web View with Browser Notification support or SMS.

The Browser Notification can only be selected if the Web View is selected, too. Web View notifications will be displayed in the Notifications area while a Browser Notification is a native browser notification which needs to be enabled in the web browser at first time.

Appointment Notifications

In this widget, the methods used for any kind of appointment notification can be selected.

<table>
<thead>
<tr>
<th>Appointment Notifications</th>
<th>all/none</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment reminder notification</td>
<td>✉️</td>
</tr>
</tbody>
</table>

Fig. 30: Appointment Notifications Widget

The possible methods are Email, Web View with Browser Notification support or SMS.

The Browser Notification can only be selected if the Web View is selected, too. Web View notifications will be displayed in the Notifications area while a Browser Notification is a native browser notification which needs to be enabled in the web browser at first time.
1.3.4 Customize Organizer

This menu item contains the organizer sidebar customization possibilities.

The organizer sidebar displays the items that are currently added to the organizer. It is possible to add new items or edit the existing items. An item can be added more than once. This is useful if the same item is needed but with a different configuration.

To add an item to the organizer sidebar:
1. Click on the + icon to add a new item.
2. Toggle the icon chooser to set a different icon.
3. Enter a name for the new item.
4. Select the item type from the list.
5. Click on the Customize option to customize the item.
6. Click on the Finish Customization button.
7. Click on the Save button.

To edit an item in the organizer sidebar:
1. Select an item from the sidebar.
2. Change the icon and the name of the item, if needed.
3. Click on the Customize option to customize the item.
4. Click on the Finish Customization button.
5. Click on the Save button.

The customization possibilities of an item depend on the item type. In the customization screen, it is possible to hide and show columns for the item list; select sorting criteria and the sorting orders; define filters for the objects; and set the number of results that can be selected. This number of objects will be loaded the first time the list is displayed and for each time the list is scrolled down.

Every organizer item can be moved up and down to change its position in the sidebar. They can be cloned to make the configuration easier, and of course, they can be deleted as well.

With the Reset to Default button, it is possible to reset the organizer to the default state.

By using the Organizer Hover switch, the agent can activate and deactivate the generated sub menu which appears when they hover the mouse over an organizer item. If there is no such switch, this feature is deactivated to all agents.

1.3.5 Chat Availability

Here, the agent can specify if he/she is available for chat or not.

**Not available**
Not available for any chats.

**Internal**
Only available for agent-to-agent chats.

**Internal & external**
1.3.6 Logout

This section is used to logout from the system. Just click on the *Logout* button to exit.

1.4 Personal Dashboard

The personal dashboard collects all the information that agents need for their daily tasks. The personal dashboard contains several widgets that display the most important objects and lists.

![Personal Dashboard](image)

Fig. 31: Personal Dashboard

The personal dashboard is accessible from any part of the software by clicking on the house icon in the breadcrumb bar or by clicking on the logo in the top right corner.

The term *personal* means that every agent can customize their dashboard. It is possible to add, remove, reorder and configure the widgets. They can apply filters on each widgets and rename the widgets to their needs.

**See also:**

Take a look at the *Navigation And Usage* chapter for more information.
1.5 Tickets

Agents can communicate with customer users via email, phone or SMS, and agents can communicate with other agents via notes. Additionally, it is possible to start processes, which can affect both agents and customer users.

The communication for all of these is managed by using tickets. This means, OTRS will convert any type of communications into tickets, and it will add the related messages as articles to the ticket.

1.5.1 Create Ticket

Use this screen to add a new ticket to the system. The ticket create screen is available from the main menu and from the action menu, as well as from the customer and customer user cards.

When agents start the communication, they can create email tickets, phone tickets, process tickets or SMS tickets. All communications result in a ticket, and the first message is added to the ticket as an article.

Email Ticket
Email ticket is used to send an email to the customer user or to other recipients when the ticket is created.

Phone Ticket
Phone ticket is used to record the information gathered during a phone call with the customer user. When the ticket is created, no email will be sent to the customer user. The ticket is treated as if it was originally created by the customer user.

Process Ticket
Creating a process ticket will start a defined process. The agents and the customer users have to follow the steps that are provided by the process. Any message created during a process ticket will create new articles in this ticket.

SMS Ticket
SMS ticket is used to create a ticket and send the first article via SMS to the customer user. SMS ticket has a limited body size to fit the text to SMS length restrictions.

The following section explains how an agent can create a new request in the agent interface for the customer user. Creating email tickets, phone tickets and SMS tickets are almost the same, so the following sections will describe the ticket creation in a general manner.

Properties Widget

The Properties widget is used to create the request for the customer user. This widget consists of four sections: Customer, Assignment, Service Level Management and Communication.

Customer
In this section, the customer user for whom the new ticket is being created can be selected. The customer user can be selected by typing the name into the field or by using the customer address book next to the field. Using the wildcard character * is possible to search for the customer user.

Note: The access to the address book could be restricted to certain user groups. In this case the icon is not visible. Please contact your administrator to get access.

Customer User *
The person for whom the ticket is created.
Customer ID
This field will be auto-populated by selecting a customer user.

Assignment
In this section, the queue to which the ticket should be assigned, as well as the owner and the responsible of the ticket, are selected. The queue selection is mandatory.

Queue *
The queue into which the new ticket will be placed.

Owner
The owner is the agent who will actually work with the new ticket.

Responsible
The responsible agent will be responsible for the ticket. This agent has the same permissions as the owner.

Note: This feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

Service Level Management
In this section, the priority and the next ticket state can be selected.
Priority *
New tickets have a 3 normal priority by default. Select another priority if you want to change it.

State *
New tickets are in an open state by default. Select another state if you want to change it.

Communication
In this section, a message much like you would find in an email client can be entered. This section is different for phone tickets and email tickets.

In the widget configuration of this widget, it is possible to set whether the next screen after creation of a ticket is the create screen again or the detail view of the created ticket.

From *
This field is available only for phone tickets, and it is mandatory. This is because a phone ticket is treated as if it was created by the customer user.

To *
For an email ticket, this will be the person for whom the ticket was created. This will be used in the To field of the email that is generated.

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

For phone tickets, the To field is read-only and will be auto-populated with the queue selected in the previous section.

Cc
Select other customer users as carbon copy of the email, if needed. This field is displayed only for email tickets.

Bcc
Select other customer users as blind carbon copy of the email, if needed. This field is displayed only for email tickets.

Text Template
It is possible to select a text template for the new ticket. The content of the template will overwrite existing texts.

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

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

Signature
This field is only applied to email tickets and appends a pre-configured signature text to the body text.

Relevant Knowledge
This field is not visible by default, but it displays related Knowledge Base Articles based on the keywords entered in the Subject and/or the Body fields. Clicking on a knowledge base article opens the knowledge base article detail view.

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

Attachments
It is possible to add attachments to the ticket. Click on the field to add an attachment, or just drop some files here.
Fig. 35: Write The Message
**Time Units**

Enter any amount of time that is to be used in time accounting.

There is an option in the widget configuration where the screen after ticket creation can be selected for each type of ticket create screen separately. An agent can decide if the next screen should be the ticket create screen again or the detail view of the created ticket.

**Customer Information Widget**

This widget displays detailed information about the selected customer user and about its customer.

![Customer Information Widget](image)

**Customer User History Widget**

This widget shows the tickets for the customer user selected above.

![Customer User History Widget](image)
Customer History Widget

This widget shows the tickets for the customer selected above.

![Customer History Widget](image1)

Fig. 38: Customer History Widget

1.5.2 Ticket List

The ticket list shows tickets based on the list’s configuration. The visible columns and the filter configuration can be changed using the Customize Organizer menu item in the Personalization menu.

![Ticket List](image2)

Fig. 39: Ticket List

The title column contains the subject of the last article created by a customer user. If no customer article can be found, the title column contains the subject of the latest agent or system article.

If there are articles in a ticket that the agent did not read yet, the ticket is displayed with bold text in the ticket list and marked as unread. When an agent selects a ticket and reads all its articles, it will be marked as read and will be displayed with normal text in the ticket list.

Clicking on a ticket in the list opens the detail view of the ticket.
See also:
The general usage of a list is explained in the Business Object List section of the Navigation And Usage chapter.

Ticket List Actions

The ticket list supports some actions that can be performed on many tickets at the same time. To enable the bulk actions, the agent has to select at least one ticket in the list and click on the pen icon.

The eye icon allows agents to watch or unwatch tickets. With this function, an agent can subscribe or unsubscribe to information about the ticket’s changes. An agent who is watching a ticket will be notified in the same way as the owner or the responsible of the ticket.

Note: This feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

If the selected tickets are not locked to the agent, they will be automatically locked while performing the bulk action. This needs to be confirmed by clicking on the Lock and Continue button.

By clicking Lock and Continue, 4 tickets will be locked to you.

Fig. 40: Lock and Continue

Note: If the agent does not have permissions to lock the selected tickets, a notification message will inform the agent about the tickets that cannot be locked. It is possible to continue with the bulk action, but the listed tickets will not be affected.

The following actions are available:

Change Properties
This action allows agents to change the properties of the selected tickets.

The following properties can be changed:

- State
- Queue
- Owner
- Priority

Link Tickets
This action allows to link the selected tickets together or with a parent ticket. The linked tickets will be displayed in the Linked Tickets widget of the ticket detail view.

Do not link
Select this option if the selected tickets should not be linked. This is selected by default.
Fig. 41: Change Properties

Fig. 42: Link Tickets
**Link together**
Select this option to link the selected tickets together.

**Search field**
The search field allows the agent to search for another ticket. Using a wildcard * is supported. The selected tickets from the ticket list will be linked to the original ticket by the search field.

**Merge Tickets**
This action allows agents to merge the selected tickets to the oldest one or to any other ticket. For this action the ticket needs to be locked to the agent who is performing the action.

**Warning**: The merge action cannot be undone.

- **Merge Tickets**

  - Do not merge
  - Merge to oldest

**Write Email**
This action allows agents to write an email message to customer users found in the selected tickets. The body of the email will be added to the selected tickets as an article.

- **Recipients**
  This field is read-only and contains all recipients from the selected tickets.

- **Subject**
  This text will be the subject for the emails to be sent and the subject of the article to be added to the selected tickets.

- **Body**
  This text will be the body for the emails to be sent and the body of the article to be added to the selected tickets.

- **Time Units**
  Enter any amount of time that is to be used in time accounting.

**Write Note**
This action allows agents to write a note for the selected tickets. The body of the note will be added to the selected tickets as an article.
**Write Email**

**Recipients**

803@slow-company-example-service.com

**Subject**

Enter...

**Body**

Format - | Font - | Size - | Source

Enter...

**Time Units (work units)**

Enter...

---

Fig. 44: Write Email
Write Note

Subject

Enter...

Body

Enter...

Visible to customer

Time Units (work units)

Enter...

Fig. 45: Write Note
Subject
This text will be the subject for the emails to be sent and the subject of the article to be added to the selected tickets.

Body
This text will be the body for the emails to be sent and the body of the article to be added to the selected tickets.

Visible to customer
If this checkbox is checked, the note will be visible to customer users in the external interface.

Time Units
Enter any amount of time that is to be used in time accounting.

Click on the Execute Bulk Action button to perform the selected action. After executing the bulk action, the selected tickets are automatically unlocked. To prevent this, unselect the checkbox Unlock after bulk execute. In this case, the affected tickets remain locked.

1.5.3 Ticket Detail View

Use this screen to see the details of a ticket. The ticket detail view is available if you select a ticket from a ticket list.

Ticket Detail View Widgets

Like other business object detail views, the ticket detail view is also highly customizable. Some of the following widgets are displayed with the default installation, but others have to be added in the screen configuration.

Drafts Widget
This widget shows the new articles that have been saved for later work. This widget is displayed only when at least one draft has been saved.

Clicking on an item in the list opens the draft to continue editing it.

![Drafts Widget](image)

Communication Compact Widget
This widget shows all articles of the ticket in a table view. There is an Expand All or Collapse All button in the header to expand or collapse the content of the widget.

![Communication Compact Widget](image)
The column with the arrows informs about the direction of the article. Articles can be incoming or outgoing messages, as well as internal messages.

Articles in the communication of a ticket can come from different channels. The column *Channel* informs about the channel of the according article.

The column with the information icon shows additional article information, for example if the article is marked as important.

The last column indicates whether the article has attachments or not.

![Communication Compact Widget](image)

**Fig. 48: Expanded Communication Compact Widget**

Clicking on an article will display the detail view of *Articles*. Unread articles are displayed with bold text. Clicking on the *Expand all* button at the top of the widget expands all articles and marks all articles as read.

The symbols that are displayed within the message box show information that belong to this message. The symbols outside only show information about the sending status of the message.

**Warning:** The maximum number of 500 articles per ticket should not be exceeded. Exceeding this limit may affect the system performance.

**Communication Stream Widget**

This widget shows the articles of a ticket in a different format than in the widget *Communication Compact*. The articles are displayed as symbolic speech bubbles next to the authors’ avatar images with the title and first few lines of the article.

The article direction is represented by the avatars of each side. Avatars on the left side represent the incoming articles, and avatars on the right side represent the outgoing articles. The icons near the avatars represent the channel through which the article was sent.

Clicking on an article will display the detail view of *Articles*. Unread articles are displayed with bold text. Clicking on the *Expand all* button at the top of the widget expands all articles and marks all articles as read.
The symbols that are displayed within the message box show information that belong to this message. The symbols outside only show information about the sending status of the message.

**Warning:** The maximum number of 500 articles per ticket should not be exceeded. Exceeding this limit may affect the system performance.

**Properties Widget**

This widget shows the properties of the ticket. The properties are presented as small cards within the widget.

**People Widget**

This widget can be used to display user cards of the people who created the ticket or who are set as owner or responsible for it.

**Customer Information Widget**

This widget shows information about the customer and the customer user of the ticket.

The cards show the number of open and closed tickets. If the customer user is online, the icon is active in the Chat section. Using this icon, the agent can start a chat with the customer user. Clicking on the icons in the Create section opens the create ticket screen. From the Action section, it is possible to edit the customer user or the customer. The Map section contains a link to view the customer’s
Fig. 51: People Widget

Fig. 52: Customer Information Widget
address on a configured map. The URL in the Web section points to the customer’s website. The Social section contains links to some social media pages or search engines that are related to the customer user or the customer.

For unknown customers, only a Show All Tickets button is displayed in this widget.

Linked Tickets Widget

This widget shows the linked tickets, but the widget is only displayed when at least one ticket is linked to this business object. New links can be added with the Link Objects action. Existing links can also be managed there.

![Fig. 53: Linked Tickets Widget](image)

Linked Knowledge Base Articles Widget

This widget shows the linked knowledge base articles, but the widget is only displayed when at least one knowledge base article is linked to this business object. New links can be added with the Link Objects action. Existing links can also be managed there.

![Fig. 54: Linked Knowledge Base Articles Widget](image)

Linked Appointments Widget

This widget shows the linked appointments, but the widget is only displayed when at least one appointment is linked to this business object. New links can be added with the Link Objects action. Existing links can also be managed there.

![Fig. 55: Linked Appointments Widget](image)

Attachments Widget

This widget can be used to display attachments to the articles. The attachments can be downloaded and, for the images, a preview function is supported.
Ticket Detail View Actions

The following actions are available in the ticket detail view.

Communication

This column groups the following actions together:

Add Note
This action allows agents to create a note for ticket and to add the note as article to the ticket. Notes are only visible to agents by default.

Add Phone Call Outbound
This action allows agents to add a note about an outgoing phone call to the ticket.
For this action the ticket needs to be locked to the agent who is performing the action.

Add Phone Call Inbound
This action allows agents to add a note about an incoming phone call to the ticket.

Send Email Outbound
This action allows agents to send an email and to add the email as an article to the ticket.
This action is typically used to involve third parties via email without the customer user of the ticket being able to view this mail communication. For this reason, the article is not visible to the customer user by default. If the addressee (the third party) sends a reply email, this reply is also not visible to the customer user of the ticket.
For this action the ticket needs to be locked to the agent who is performing the action.

Send SMS Outbound
This action allows agents to send an SMS message and to add the SMS content as an article to the ticket.
For this action the ticket needs to be locked to the agent who is performing the action.

Note: Additional contract is needed to use this action.

Organization

This column groups the following actions together:

Lock Ticket or Unlock Ticket
This action allows agents to lock or unlock the ticket. If an agent locks the ticket, the agent will be the owner of the ticket.

Change Free Fields
This action allows agents to change the free fields of the ticket, for example the title of the ticket.

Merge Ticket
This action allows agents to merge one ticket with another ticket.
<table>
<thead>
<tr>
<th>Communication</th>
<th>Organization</th>
<th>People</th>
<th>Views</th>
</tr>
</thead>
<tbody>
<tr>
<td>→ Add Note</td>
<td>→ Unlock Ticket</td>
<td>→ Change Owner</td>
<td>→ Print Ticket</td>
</tr>
<tr>
<td>→ Add Phone Call Outbound</td>
<td>→ Change Free Fields</td>
<td>→ Change Responsible</td>
<td>→ View History</td>
</tr>
<tr>
<td>→ Add Phone Call Inbound</td>
<td>→ Merge Ticket</td>
<td></td>
<td></td>
</tr>
<tr>
<td>→ Send Email Outbound</td>
<td>→ Watch Ticket</td>
<td>→ Change Customer</td>
<td></td>
</tr>
<tr>
<td>→ Send SMS Outbound</td>
<td>→ Assign Process</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>→ New Appointment</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>→ Close Ticket</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>→ Link Objects</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>→ Move Ticket</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>→ Set Pending Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>→ Change Priority</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Fig. 57: Ticket Detail View Actions
For this action the ticket needs to be locked to the agent who is performing the action.

**Warning:** The merge action cannot be undone.

**Watch Ticket or Unwatch Ticket**
This action allows agents to subscribe or unsubscribe to notifications about the ticket’s changes. An agent who is watching a ticket will be notified in the same way as the owner or the responsible of the ticket.

**Note:** This feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

**Assign Process**
This action allows agents to assign this ticket and all articles to a process.

**Note:** This feature is only available when at least one process is deployed.

**New Appointment**
This action allows agents to create an appointment related to the ticket. The new appointment will be linked to the ticket and will be visible in the *Calendar Overview*.

**Close Ticket**
This action allows agents to close the ticket.
For this action the ticket needs to be locked to the agent who is performing the action.

**Delete Ticket**
This action allows agents to delete the ticket.
For this action the ticket needs to be locked to the agent who is performing the action.

**Note:** This feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

**Link Objects**
This action allows agents to link other business objects to the ticket.

**Move Ticket**
This action allows agents to change the queue of the ticket. Queues are like folders for tickets. A ticket can belong to only one queue at a time.
For this action the ticket needs to be locked to the agent who is performing the action.

**Set Pending Time**
This action allows agents to set the pending time of the ticket.
For this action the ticket needs to be locked to the agent who is performing the action.

**Change Priority**
This action allows agents to change the priority of the ticket.
For this action the ticket needs to be locked to the agent who is performing the action.

**Mark as Junk**
This action allows agents to mark the ticket as junk or spam.
For this action the ticket needs to be locked to the agent who is performing the action.

**Note:** This feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

**External Link**
This feature provides an easy way to display external links in the ticket action menu.

**Note:** This feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

**People**
This column groups the following actions together:

**Change Owner**
This action allows agents to change the owner of the ticket.

**Change Responsible**
This action allows agents to set or change the responsible of the ticket.

**Note:** This feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

**Change Customer**
This action allows agents to change the customer and the customer user of the ticket.

**Views**
This column groups the following actions together:

**Print Ticket**
This action allows agents to print the ticket to a PDF file and to download it.

**View History**
This action allows agents to view the history of the ticket. The history contains all operations that happened with the ticket in the past, along with timestamp and username of the person who took the action.

**Sidebar**
The sidebar gives a quick overview about what agents are involved in the ticket: who is the ticket’s owner, who is the ticket’s responsible, and which agents are watching the ticket.

Involved agents are indicated with a pen icon when hovering the mouse over the sidebar. This means that the agent has performed some actions on the ticket, for example changed the properties or added articles.

The agents who are watching the ticket are indicated with an eye icon when hovering the mouse over the sidebar.

The dark green border around the avatar image means that the agent is the owner of the ticket, while the responsible agent has a light green border around the avatar image.
1.6 Articles

Articles are the entries in a ticket. All communications within a ticket produce a new article.

Use the article detail view to work with articles. The article detail view is available from the Communication Compact or from the Communication Stream widgets of the ticket detail view when an article is expanded.
1.6.1 Article Detail View Actions

The following actions are available in the article detail view.

<table>
<thead>
<tr>
<th>Communication</th>
<th>Organization</th>
<th>Views</th>
</tr>
</thead>
<tbody>
<tr>
<td>→ Reply via Note</td>
<td>→ Mark as Important</td>
<td>→ Copy Article Link</td>
</tr>
<tr>
<td>→ Reply via Email</td>
<td>→ Split Article</td>
<td>→ Print Article</td>
</tr>
<tr>
<td>→ Redirect via Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>→ Reply to All via Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>→ Forward via Email</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

![Fig. 60: Article Detail View Actions](image)

**Communication**

This column groups the following actions together:

- **Reply via Note**
  
  This action allows you to reply to an article if the original article is a note. The reply via note screen is very similar to the add note screen.

- **Reply via Email**
  
  This action allows you to reply via email to the article. The reply via email screen is very similar to an email client screen.

  If the sender of an article is not the customer user, this action sets the original sender into the **To** field and adds the customer user to the **Cc** field for external articles. If the article is internal, then the original sender is set into the **To** field (if email is available) and the customer user is not added to the **Cc** field or any other fields.

  For this action the ticket needs to be locked to the agent who is performing the action.

- **Redirect via Email**
  
  This action allows you to redirect the article as an email. The new recipient will receive the email like it was sent to them originally. It is possible to inform the original sender about the redirection.

  For this action the ticket needs to be locked to the agent who is performing the action.

- **Reply to All via Email**
  
  This action allows you to send an article reply via email to all recipients at one time. The reply to all via email screen is very similar to an email client screen.

  For this action the ticket needs to be locked to the agent who is performing the action.
If the sender of an article is not the customer user, this action sets the original sender into the To field and adds the additional recipients and the customer user to the Cc field for external articles. If the article is internal, then the original sender is set into the To field (if email is available) and the additional recipients are added to the Cc field; the customer user is not added to the Cc field or any other fields.

**Forward via Email**
This action allows you to forward the article as an email. The forward via email screen is very similar to an email client screen.

For this action the ticket needs to be locked to the agent who is performing the action.

**Reply via SMS**
This action allows you to reply to an article via SMS message. It is possible to send the SMS as a flash message so that it displays directly on the target mobile device without user interaction (depends on the used device and provider).

For this action the ticket needs to be locked to the agent who is performing the action.

---

**Note:** Additional contract is needed to use this action.

---

**Organization**
This column groups the following actions together:

**Mark as Important or Unmark as Important**
This action allows you to mark or unmark the article as important. Articles marked as important have a lightning icon in the header.

**Split Article**
This action allows you to split the article into an other ticket. The agent can split the article to a phone, email or process ticket.

**Views**
This column groups the following actions together:

**Print Article**
This action allows you to print the article to a PDF file and download it.

**Copy Article Link**
This action allows you to copy the individual article’s link to the clipboard.

**Plain View**
This action allows you to view the raw source of the email article.

---

### 1.7 Knowledge Base Articles

Knowledge base articles contain answers to frequently asked questions, or they contain common knowledge. Creating knowledge base articles should be done based on customer tickets. A good knowledge base contains all relevant information that occurs during ticket handling. Knowledge base articles can be easily attached to new tickets in any ticket or article creation screen. This can help agents shorten the time it takes to answer a ticket.
1.7.1 Create Knowledge Base Article

Use this screen to add new knowledge base articles to the system. The knowledge base article create screen is available from the main menu and from the action menu.

Fig. 61: Create Knowledge Base Article

The following settings are available when adding a knowledge base article. The fields marked with an asterisk are mandatory.

**Properties**

In this section, the following options can be set.

- **Title**
  The name of the knowledge base article. Any type of characters can be entered into this field, including uppercase letters and spaces. The name will be displayed in the overview table.

- **Keywords**
  Add some keywords to make it easier to find the knowledge base article.

- **Category**
  Select a category from the available categories.

- **State**
  Select the state of the knowledge base article. Possible options are:
  - **External (customer)**: The knowledge base article is visible to agents and customer users who are logged into the external interface.
  - **Internal (agent)**: The knowledge base article is visible to agents only.
  - **Public (all)**: The knowledge base article is visible to anyone via the external interface.

- **Validity**
  Set the validity of this knowledge base article. Knowledge base articles can only be used in OTRS if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the knowledge base article.

- **Language**
  Select a language from the available languages.
Attachments
   It is possible to add attachments to the knowledge base article. Click on the field to add an attachment or just drop some files here.

Symptom (public)
   Add a description that explains the current situation here.

Problem (public)
   More detailed description about the situation.

Solution (public)
   Explain how to solve the problem, or share a workaround for solving it.

Comment (internal)
   Internal text about the current knowledge base article for agents only.

1.7.2 Knowledge Base Article List

Use this screen to browse through the knowledge base articles. The knowledge base article list is available from the organizer sidebar.

![Knowledge Base Article List]

Fig. 62: Knowledge Base Article List

The items in the list can be exported. Clicking on an item in the list opens the detail view of the knowledge base article.

1.7.3 Knowledge Base Article Detail View

Use this screen to see the details of a knowledge base article. The knowledge base article detail view is available when you select a knowledge base article from a knowledge base article list.

Knowledge Base Article Detail View Widgets

Like other business object detail views, the knowledge base article detail view is also highly customizable. Some of the following widgets are displayed with the default installation, but others have to be added in the screen configuration.

Symptom Widget
   This widget can be used to describe the symptom of a problem.

Problem Widget
   This widget can be used to describe the problem itself.
Solution Widget
   This widget can be used to describe the solution of the problem.

Properties Widget
   This widget shows the properties of the knowledge base article. The properties are presented as small cards within the widget.

   Most of the cards have a pen icon in the top right corner. Clicking on this icon allows agents to directly edit the property.

Attachments Widget
   This widget can be used to display the attachments of the knowledge base article. The attachments can be managed with the Edit action.

Rating Widget
   This widget can be used to rate the knowledge base article. To rate the knowledge base article, click on the Yes or No face in this widget.

Linked Tickets Widget
   This widget shows tickets that are linked to the knowledge base article. The widget is only displayed when at least one ticket is linked to this business object. New links can be added with the Link Objects action. Existing links can also be managed here.

Linked Knowledge Base Articles Widget
   This widget shows other knowledge base articles that are linked to the knowledge base article being viewed. The widget is only displayed when at least one knowledge base article is linked to this business object. New links can be added with the Link Objects action. Existing links can also be managed here.

Linked Appointments Widget
   This widget shows appointments that are linked to the knowledge base article. The widget is only displayed when at least one appointment is linked to this business object. New links can be added with the Link Objects action. Existing links can also be managed here.

Comment (internal) Widget
   This widget can be used to add a comment to the article. The comment is not shown in the external interface.
1.7. Knowledge Base Articles

Fig. 66: Properties Widget

Fig. 67: Attachments Widget

Fig. 68: Rating Widget

Fig. 69: Linked Tickets Widget

Fig. 70: Linked Knowledge Base Articles Widget

Fig. 71: Linked Appointments Widget
People Widget
This widget can be used to display user cards of the people who created and last changed the knowledge base article.

Knowledge Base Article Detail View Actions
The following actions are available in the knowledge base article detail view.

Organization
→ Edit Knowledge Base Article
→ Link Objects
→ Delete Knowledge Base Article

Views
→ View History
→ Print Knowledge Base Article
**Link Objects**
This action allows you to link other business objects to the knowledge base article.

**Delete Knowledge Base Article**
This action allows you to delete the knowledge base article. A confirmation dialog will display to confirm the deletion.

**Views**
This column groups the following actions together:

**View History**
This action allows you to view the history of the knowledge base article. The history contains all operations, including timestamp and username, that happened with the knowledge base article in the past.

**Print Knowledge Base Article**
This action allows you to print the knowledge base article to a PDF file and to download it.

---

**1.8 Customers**

Customers in OTRS are organizations, companies or authorities. The real users are called *Customer Users*. A fresh OTRS installation contains no customers by default.

**1.8.1 Create Customer**

Customers can be added by using the links in the main menu and in the action menu.

To add a customer:

1. Choose a data source.

![Select Data Source](Fig. 75: Select Data Source)

2. Fill in the required fields.
3. Click on the *Create* button.

The following settings are available when adding a customer. The fields marked with an asterisk are mandatory.

**Data Source** *
In this section, the data source for storing customers can be selected. Multiple data sources are supported, including external data sources like LDAP.
Fig. 76: Add Customer Data
Note: External data sources can be read-only.

Customer Information
In this section, the full name and the internal name of the customer can be added.

**Customer** *
The full name of the customer (usually the same as the company name). Any type of characters can be entered into this field, including uppercase letters and spaces.

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

**Valid** *
Set the validity of this customer. Customers can only be used in OTRS if this field is set to **valid**. Setting this field to **invalid** or **invalid-temporarily** will disable the use of the customer.

Address
In this section, address information about the customer can be added.

**Street**
The street name of the customer.

**Zip**
The zip code of the customer.

**City**
The city of the customer’s headquarters.

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

Miscellaneous
In this section, additional information about the customer can be added.

**URL**
The web page or other URL of the customer.

**Comment**
Add additional information to this customer. It is recommended that you always fill this field with full sentences for better clarity.

1.8.2 Customer List

Use this screen to browse through the valid customers. The customer list is available from the organizer sidebar.

The customer list has no bulk actions. Clicking on the pencil icon in the column **Edit** opens the customer edit screen.

It is possible to preview a customer’s business card by hovering the mouse over the customer ID or name of a customer. Clicking on a customer in the list opens the customer detail view.
1.8.3 Customer Detail View

Use this screen to see the details of a customer. The customer detail view is available when you select a customer from a customer list.

Customer Detail View Widgets

Like other business object detail views, the customer detail view is also highly customizable. Some of the following widgets are displayed with the default installation, but others have to be added in the screen configuration.

Customer Information Widget

This widget shows information about the customer.

The card shows the number of open and closed tickets related to this customer. From the Action
section, it is possible to edit the customer. The *Map* section contains a link to view the customer address on a configured map. The URL in the *Web* section points to the customer’s website. The *Social* section contains links to some social media pages or search engines that are related to the customer.

**Escalations Widget**

This widget lists the customer’s escalated tickets. Escalated tickets are tickets that remain open after the time that was set by the customer’s service level agreement; therefore the ticket needs to be worked on immediately.

Clicking on a ticket opens the ticket detail view.

![Fig. 79: Escalations Widget](image)

**Reminders Widget**

This widget lists the customer’s pending tickets. Pending tickets are set for work at a later time by the agent, and the reminder time is going to expire soon.

Clicking on a ticket opens the ticket detail view.

![Fig. 80: Reminders Widget](image)

**Open Tickets Widget**

This widget lists the customer’s open tickets. Open tickets represent the current work to be done by the agent.

Clicking on a ticket opens the ticket detail view.

![Fig. 81: Open Tickets Widget](image)

**Customer Users Widget**

This widget is used to list all customer users that belong to the customer. It is possible to edit the customer user and create tickets directly from the widget.

It is possible to preview a customer user’s business card by hovering the mouse over the username or the name of a customer user. Clicking on a customer user in the list opens the customer user detail view.

**Ticket List Widget**

This widget lists all the tickets of the customer.

Clicking on a ticket opens the ticket detail view.
Customer Detail View Actions

The following actions are available in the customer detail view.

**Organization**

- **Edit Customer**
  
  This action allows the agent to edit the customer.

**People**

- **Add Customer User**
  
  This action opens the Create Customer User screen in order to add a customer user to this customer.
1.9 Customer Users

Customer users in OTRS are the real people who work at or are related to Customers. A fresh OTRS installation contains no customer users by default.

1.9.1 Create Customer User

Customer users can be added by using the links in the main menu and in the action menu, as well as by using the Add Customer User action in a customer detail view.

To add a customer user:

1. Choose a data source.

2. Fill in the required fields.

3. Click on the Create button.

The following settings are available when adding a customer user. The fields marked with an asterisk are mandatory.

**Data Source** *

This section allows selecting the data source for storing customer users. Multiple data sources are supported, including external data sources like LDAP.

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

**Personal Information**

In this section, personal information about the customer user can be added.

**Title or salutation**

Some name prefixes can be added here like Mr., Dr., Jr., etc.

**Firstname** *

The first name of the customer user.

**Lastname** *

The last name of the customer user.

**Email** *

The email address of the customer user.
Fig. 86: Add Customer User Data

<table>
<thead>
<tr>
<th>Data Source</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>* Data Source</td>
<td>Database Backend</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personal Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Firstname</td>
</tr>
<tr>
<td>* Lastname</td>
</tr>
<tr>
<td>* Email</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Login Forbidden</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Miscellaneous</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street</td>
</tr>
<tr>
<td>Zip</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>Country</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Login Credentials</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Username</td>
</tr>
</tbody>
</table>

The password must contain at least:
- 8 characters
- *valid

Create
CustomerID *
The customer ID of the customer’s company, also known as the customer to which the customer user belongs.

Phone
The phone number of the customer user.

Fax
The fax number of the customer user.

Mobile
The cellphone number of the customer user.

Address
In this section, address information about the customer user can be added.

Street
The street name of the customer user.

Zip
The zip code of the customer user.

City
The city of the customer user.

Country
The country of the customer user.

Login Credentials
In this section, login credentials for the customer user can be added.

Username *
The username of the customer user.

Password
The password of the customer user. The password can be restricted by the admin-configured password policy.

Valid *
Set the validity of this customer user. Customer users can only be used in OTRS if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the customer user.

Security
In this section, security restrictions for the customer user can be changed.

Login Forbidden
The login is forbidden if the customer user has reached the maximum number of failed logins. In this case, the ability for the customer user to login can be re-enabled here.

Miscellaneous
In this section, additional information about the customer user can be added.

Comment
Add additional information to this customer user. It is recommended that you always fill this field with full sentences for better clarity.
1.9.2 Customer User List

Use this screen to browse through the valid customer users. The customer user list is available from the organizer sidebar.

![Customer User List](image)

Fig. 87: Customer User List

The customer user list has no bulk actions. If the customer user is online, an icon is active in the Chat column. Using this icon, the agent can start a chat with the customer user. A special column in this list is the column Create. Clicking on the icon in this column opens the create ticket screen. Clicking on the pencil icon in the column Edit opens the edit customer user action.

It is possible to preview a customer user’s business card by hovering the mouse over the username or the name of a customer user. Clicking on a customer user in the list opens the customer user detail view.

1.9.3 Customer User Detail View

Use this screen to see the details of a customer user. The customer user detail view is available when you select a customer user from a customer user list or from a widget where customer users are displayed.

Customer User Detail View Widgets

Like other business object detail views, the customer user detail view is also highly customizable. Some of the following widgets are displayed with the default installation, but others have to be added in the screen configuration.

Customer Information Widget

This widget shows information about the customer user and about its customer.

The cards show the number of open and closed tickets. If the customer user is online, the icon is active in the Chat section. Using this icon, the agent can start a chat with the customer user. Clicking on the icons in the Create section opens the create ticket screen. From the Action section, it is possible to edit the customer user or the customer. The Map section contains a link to view the customer’s address on a configured map. The URL in the Web section points to the customer’s website. The Social section contains links to some social media pages or search engines that are related to the customer user or the customer.

Escalations Widget

This widget lists the escalated tickets that are related to this customer user. Escalated tickets are tickets that remain open after the time that was set by the customer user’s service level agreement; therefore the ticket needs to be worked on immediately.
Clicking on a ticket opens the ticket detail view.

Reminders Widget
This widget lists pending tickets related to the customer user. Pending tickets are set for work at a later time by the agent, and the reminder time is going to expire soon.

Clicking on a ticket opens the ticket detail view.

Open Tickets Widget
This widget lists the open tickets related to the customer user. Open tickets represent the current work to be done by the agent.

Clicking on a ticket opens the ticket detail view.

Ticket List Widget
This widget lists all of the tickets related to the customer user.

Clicking on a ticket opens the ticket detail view.
Customer User Detail View Actions

The following actions are available in the customer user detail view.

**Communication**

→ Create Phone Ticket

→ Create Email Ticket

→ Create SMS Ticket

**Organization**

→ Edit Customer User

---

**Communication**

This column groups the following actions together:

**Create Phone Ticket**

This action opens the *New Phone Ticket* screen in which the customer user will be pre-selected.

**Create Email Ticket**

This action opens the *New Email Ticket* screen in which the customer user will be pre-selected.

**Create SMS Ticket**

This action opens the *New SMS Ticket* screen in which the customer user will be pre-selected.

---

**Note:** Additional contract is needed to use this action.

**Start Chat**

This action allows the agent to start a chat with the customer user. This action is visible only if the customer user is online.
Organization
This column groups the following actions together:

**Edit Customer User**
This action allows the agent to edit the customer user.

Views
This column groups the following actions together:

**Login as Customer User**
This action opens the external interface and logs in as the selected customer user.

---

**Note:** The login as customer user feature is not enabled by default. It needs to first be activated by an administrator in order to use it.

---

## 1.10 Notifications

**OTRS** supports ticket notifications and appointment notifications. Ticket notifications show events happening on a ticket, for example the change of the owner or the movement into another queue. Appointment notifications show time-based events for calendars. Both notification types are displayed in the notification list.

Notifications can be received via email or SMS, as well as by using the web view with possible browser notification support. If the *Web View* notification method is selected, then the notification will be shown in the notifications list, and the bell icon at the header area of the agent interface will display the number of new notifications.

![Fig. 94: New Notification Received](image)

Clicking on the bell icon opens a popup where the latest five unread notifications are displayed.

![Fig. 95: Notification Popup](image)

Use the *Mark as Read* button to mark all notifications as read. Clicking on the *Show All* button opens the notification list where all notifications are displayed. Clicking on the document icon opens the notification list and shows the notification details. This action also marks the notification as read.

The preferred notification method can be set in the *Notification Settings* section of the *Personalization* menu. In the same menu, agents can select their preferred queues. Notifications will display only for tickets that are in the agent’s preferred queues.
The possible methods are *Email*, *Web View with Browser Notification* support or *SMS*.

### 1.10.1 Notification List

The notification list shows the ticket notifications and appointment notifications.

Selecting a notification opens a widget with the full text of the notification. There is a *Show Ticket* or *Show Appointment* button to open the relevant ticket in the ticket detail view or to show the appointment in the calendar.

**Notification List Actions**

The notification list supports some actions that can be performed on many notifications at the same time. To enable the bulk actions, the agent has to select at least one notification in the list and click on an icon in the breadcrumb bar.

The note icon makes it possible to mark the selected notifications as read. This action works for unread notifications only; there is no way to mark a notification as unread.

The trash icon allows users to delete the selected notifications. Notifications can be also deleted with the trash icon in the last column of the list.
Subject: Ticket Created: Etiam viverra dignissim ligula
When: 08/07/2023 14:18

Hi John,

ticket [Ticket#20230807100000018] has been created in queue Postmaster.

Lacey Green wrote:

http://yourhost.example.com/agent/ticket/44

-- OTRS Notifications
Warning: The notifications will be deleted without confirmation.

1.11 Statistics and Reports

This screen acts as a dashboard for statistics and reports.

Note: The agent has to be the member of the group stats to use this dashboard.

1.11.1 Reports

Reports are automatically generated statistics in PDF format, which can be sent via email.

See also:
The GoogleChrome::Bin setting needs to be activated in the system configuration in order to include graphs and diagrams in the PDF file.

In this widget, it is possible to set statistics as reports.

![Report List Widget](image)

Fig. 99: Report List Widget

To create a report:

1. Click on the + icon in the header of the Report List widget. A new screen will be displayed for the report creation.

2. Fill in the general information about the report.
   - **Name** *
     - The name of the report.
   - **Description** *
     - Add additional information to this report. It is recommended that you always fill this field with full sentences for better clarity, because the description will also be displayed in the report list.
   - **Validity**
     - Set the validity of this report. Reports can only be used in OTRS if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the report.

3. Select the times when the report will be automatically generated and fill in the email details.
   - **No schedule**
     - No email will be sent automatically.
   - **Basic schedule**
     - Select an automatic generation time from the list. An email with the report will be sent at this configured time.
Custom schedule
   Use cron syntax to define custom times for sending the emails.

Note: Scheduled tasks are using the local system time provided by the operating system OTRS is running on.

Automatic Generation Language
   Select a language from the list for the report generation.

Email Subject
   The subject for the email containing the report can be added here.

Email Body
   The body text for the email containing the report can be added here.

Email Recipients
   The recipients for the email containing the report can be added here, separated by commas.

4. Fill in the output settings.

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

   Title
   The title of the report.

   Caption for Preamble
   The caption for preamble included in the report.
Automatic Generation Settings

- No schedule
- Basic schedule
- Custom schedule

Automatic Generation Language

- Magyar

Email Subject

Specify the subject for the automatically generated email

Email Body

Specify the text for the automatically generated email

Email Recipients

Specify recipient email addresses (comma separated)

Fig. 101: Automatic Generation Settings
Output Settings

Headline
Please enter a headline

Title
Please enter a title

Caption for Preamble
Please enter a caption for preamble

Preamble
Please enter a preamble

Caption for Epilogue
Please enter a caption for epilogue

Epilogue
Please enter an epilogue

Fig. 102: Output Settings
Preamble
The preamble text of the report.

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

Epilogue
The epilogue text of the report.

5. Select one or more statistics to be added to the report. Each added statistic has its own overview and settings screen.

Note: Only statistics for which Print is defined as the result format in the general settings of the statistics can be added to the report, if the GoogleChrome::Bin setting is not activated in the system configuration.

6. After all information has been collected and set, click on the Create Report button to create the report.

The edit report screen is the same as the create report screen, but the fields are pre-filled with the current values.

To edit a report:
2. Modify the fields.
3. Click on the Save or Save and Close button.

To run a report immediately:
1. Click on the play icon in the Run column.
2. Click on the Run Report button in the new screen.

To delete a report:
1. Click on the trash icon in the Delete column.
2. Click on the Yes button in the confirmation dialog.

1.11.2 Statistics

OTRS comes with some pre-installed statistics. Lists of statistics can be found in separate widgets for each type of statistic.

Metrics Widget
This widget lists the statistics that are displayed in a table format.

<table>
<thead>
<tr>
<th>Start</th>
<th>Title</th>
<th>Object Name</th>
<th>Export</th>
<th>Run</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>10009</td>
<td>New Tickets</td>
<td>TicketAccumulation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10011</td>
<td>Overview about all tickets in the system</td>
<td>TicketAccumulation</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Fig. 103: Metrics Widget

Lists Widget
This widget lists the statistics that are displayed in a list format.
Static Widget

This widget lists the static statistics.

Creating a new statistic requires some steps.

1. Click on the + icon in the header of any statistic widget. A new screen will be displayed for the statistic creation.

2. Select the statistic type. The statistic can be Matrix, List or Static.

- Matrix: Each cell contains a single data point.
- List: Each row contains data of one entry.
3. Fill in the general information about the statistic.

**Title**
Add a title for the statistic.

**Description**
Long description about the statistic.

**Object**
Select an object from the list. The available objects depend on the statistic type.

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

**Format**
Select the format that will be available when the statistic is run. Possible formats are CSV, Excel, Graph and Print based on the selected statistic type.

**Time Zone**
Select a time zone for the generated statistic. The selected time periods in the statistic are time zone neutral.

This field is not available for static statistics.

**Create summation row**
If this is checked, an additional row is generated containing sums for all data rows.

**Create summation column**
If this is checked, an additional column is generated containing sums for all data columns.

**Valid**
If this is not checked end users can not generate the statistic.

4. Click on the **Generate Statistic** button. The screen will be refreshed; the previous widgets will be collapsed, and new widgets will be displayed.

5. Select the values for the X-axis.

It is possible to allow changes to element values before running the statistic by checking the checkbox below the list.

The available values depend on the statistic type.

5. Select the values for the Y-axis.

It is possible to allow changes to element values before running the statistic by checking the checkbox below the list.

The available values depend on the statistic type.

6. Select the filters for the data.

7. Click on the **Save and Close** button.

During the statistic creation, a preview widget will show the results.

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

The edit statistic screen is the same as the create statistic screen, but the fields are pre-filled with the current values.

To edit a statistic:
Fig. 107: General Statistic Information

1.11. Statistics and Reports 83
Fig. 108: Configure X-Axis

Fig. 109: Configure Y-Axis

Fig. 110: Add Filters
Preview Statistic

Please note that the preview uses random data and does not consider data filters.

<table>
<thead>
<tr>
<th>Number</th>
<th>Ticket#</th>
<th>Age</th>
<th>Title</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>202308071000001820 18 m</td>
<td>Etiam viverra dignissim ligula</td>
<td>2023</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>20230726100000412 12 d 20 h</td>
<td>Vestibulum pretium dolor</td>
<td>2023</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>20230726100000421 12 d 20 h</td>
<td>Nullam eget justo mi</td>
<td>2023</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>20230726100000403 12 d 20 h</td>
<td>Donec tortor augue</td>
<td>2023</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>20230726100000396 12 d 20 h Mauris id blandit justo, ut cursus ligula</td>
<td>2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>20230726100000387 12 d 20 h</td>
<td>Donec id euismod lorem</td>
<td>2023</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>20230726100000378 12 d 20 h</td>
<td>Nunc gravida</td>
<td>2023</td>
<td></td>
</tr>
</tbody>
</table>

Fig. 111: Preview Statistic Widget
1. Select a statistic in any statistic widget.
2. Modify the fields.
3. Click on the Save or Save and Close button.

To export a statistic:
1. Click on the export icon in the Export column.
2. Choose a location in your computer to save the .xml file.

To import a statistic:
1. Click on the Import button in the header of any statistic widget.
2. Select a previously exported .xml file.
3. Modify the fields and the statistics details, if needed.
4. Click on the Save or Save and Close button.

To run a statistic immediately:
1. Click on the play icon in the Run column.
2. Click on the Run Statistic button in the new screen.

To delete a statistic:
1. Click on the trash icon in the Delete column.
2. Click on the Yes button in the confirmation dialog.

Ticket Attributes for Statistics

The following ticket attributes can be included in statistics using the X-Axis field, if Lists statistics are selected.

See also:
Dynamic fields for Ticket object are also listed here. The list of dynamic fields is different in each system and can be reviewed in the Dynamic Fields module of the administrator interface.

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

Age
The relative age since ticket creation and now.

Agent/Owner
The owner agent of the ticket.

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

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

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

Customer User
The login name of the customer user of the ticket.
EscalationDestinationDate
The absolute date and time with timezone when the ticket is escalated.

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

EscalationResponseTime
Unix timestamp of response time escalation.

EscalationSolutionTime
Unix timestamp of solution time escalation.

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

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

EscalationUpdateTime
Unix timestamp of update time escalation.

First Lock
The absolute date and time with timezone when the ticket was locked first. This field is empty for tickets, that are not locked yet.

FirstResponse
The timestamp of first response.

FirstResponseDiffInMin
The difference in minutes between the specified response time and the actual response time.
This time is suitable to get an overview about the past and shown for open and closed tickets.

FirstResponseInMin
The time in minutes from ticket creation to first response (based on working time).
This time is suitable to get an overview about the past and shown for open and closed tickets.

FirstResponseTime
The total time in seconds until the first response time escalation.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

FirstResponseTimeDestinationDate
The absolute date of a first response time escalation.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

FirstResponseTimeDestinationTime
The escalation time as Unix timestamp.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

FirstResponseTimeEscalation
Indicates whether the ticket has escalated or not.

FirstResponseTimeNotification
Indicates whether the defined escalation notification time is activated or not.
FirstResponseTimeWorkingTime
The time in seconds within the defined working time or service time until an escalation of a first response.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

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

Lock
The lock state of the ticket.

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

Number of Articles
The number of articles in the ticket.

Priority
The priority of the ticket.

Queue
The queue in which the ticket is located.

RealTillTimeNotUsed
Unix timestamp of pending time.

Responsible
The responsible agent of the ticket.

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

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

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

SolutionDiffInMin
The difference in minutes between the specified solution time and the actual solution time.
This time is suitable to get an overview about the past and shown for open and closed tickets.

SolutionInMin
The total time in minutes until a solution time escalation.
This time is suitable to get an overview about the past and shown for open and closed tickets.

SolutionTime
The total time in seconds until a solution time escalation.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

SolutionTimeDestinationDate
The absolute date of a solution time escalation.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

SolutionTimeDestinationTime
The solution time escalation as Unix timestamp.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

**SolutionTimeEscalation**
Indicates whether the ticket has escalated or not.

**SolutionTimeNotification**
Indicates whether the defined escalation notification time is activated or not.

**SolutionTimeWorkingTime**
The time in seconds within the defined working time or service time until a solution time escalation.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

**State**
The state of the ticket.

**StateType**
State type of the ticket.

**Ticket#**
The ticket number.

**Title**
The title of the ticket.

**Type**
The type of the ticket.

**UnlockTimeout**
Time until the ticket is automatically unlocked.

**UntilTime**
Total seconds till pending.

**UpdateTime**
The total time in seconds until an update time escalation.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

**UpdateTimeDestinationDate**
The absolute date of an update time escalation.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

**UpdateTimeDestinationTime**
The update time escalation as Unix timestamp.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

**UpdateTimeEscalation**
Indicates whether the ticket has escalated or not.

**UpdateTimeNotification**
Indicates whether the defined escalation notification time is activated or not.

**UpdateTimeWorkingTime**
The time in seconds within the defined working time or service time until an update time escalation.
This time is only suitable to get an overview about the current situation because it is shown only for open tickets.

1.12 Calendar Overview

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

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

Use this screen to get an overview of your OTRS calendars. The overview screen is available in the Calendar Overview menu item from the main menu.

1.12.1 Calendar Widgets

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

This overview works the same as a traditional calendar. Different time periods and timelines can be selected to view appointments, and it is possible to jump between different periods.

The default installation comes with three separate widgets for daily, weekly and monthly calendar views. Basically all widgets are the same, but with different widget configurations. All widgets support agenda view, timeline view and grid view.

The display options can be changed in the widget configuration.

Appointments Today Widget
This widget displays the appointments for a specific day.

Appointments This Week Widget
This widget displays the appointments for a specific week.

Appointments This Month Widget
This widget displays the appointments for a specific month.

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

To view OTRS appointments in external calendar applications:

1. Click on the Copy public calendar URL icon in the Calendars sidebar to copy the URL to the clipboard.
2. Open your external calendar application.
3. Insert the URL into your external calendar application.

Note: If several calendars are added to the system, use the filter box to find a particular calendar. Just type the calendar name into the filter box.

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

To add a new appointment:
1. Click on the Add Appointment button in the header of the widget.
2. Fill in the required fields.
3. Click on the Add button.

To edit an appointment:
1. Click on an appointment in the calendar overview.
2. Modify the fields.
3. Click on the Update button.

To copy an appointment:
1. Click on an appointment in the calendar overview.
2. Scroll down to the bottom of the edit dialog.
3. Click on the Copy button. A new appointment is created from the original one.
4. Edit the new appointment for your needs.

To delete an appointment:
1. Click on an appointment in the calendar overview.
2. Scroll down to the bottom of the edit dialog.
### Appointments This Week

**Calendars**

- Company Events
- Meetings

**Date Range:** 14 – 20 Aug 2023 #33

<table>
<thead>
<tr>
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<th>02:00</th>
<th>04:00</th>
<th>06:00</th>
<th>08:00</th>
<th>10:00</th>
<th>12:00</th>
<th>14:00</th>
<th>16:00</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Fig. 114:** Appointments This Week Widget
Fig. 115: Appointments This Month Widget
3. Click on the Delete button.
4. Click on the Yes button in the confirmation dialog.

1.12.2 Add Appointment

Use this dialog to add new appointments to calendars. New appointments can be added by clicking on the plus button in the header of any calendar widget. It is possible to add new appointments from the action menu too. It is also possible to drag your cursor over a time range on the calendar area to setup a rough time span for an appointment. Right after that, the Add Appointment dialog will appear and additional data can be inserted.

Appointment Settings

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

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

Title *
The name of the appointment. Any type of characters can be entered into this field including uppercase letters and spaces. The name will be displayed in the calendar widgets.

Description
Add additional information to this appointment. It is recommended that you always fill this field with full sentences for better clarity.

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

See also:
This link is configurable through the system configuration option AppointmentCalendar::Location::Link.

Resource
Resource planning is not part of the OTRS framework. Please contact us at sales@otrs.com for an upgrade.

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

Start date *
The start date of the appointment.

End date *
The end date of the appointment.

Repeat *
Define recurring appointments. This is described separately, see Repeating Appointments below.

Notification *
Define time periods when an appointment notification should be sent before the appointment’s start.
**Add Appointment**

- **Basic Information**
  - *Calendar*
    - Please select a calendar
  - *Title*
    - Please enter a title
  - Description
    - Please enter a description
  - Location
    - Please enter a location

- **Resource**
  - This feature is currently not available.

- **Date & Time**
  - All day
  - *Start Date*
  - *End Date*
  - *Repeat*
    - Never

- **Notification**
  - *Notification*
    - No notification

- **Linked Tickets**
  - Add Ticket

---

**Fig. 116: Add Appointment Dialog**

---

**1.12. Calendar Overview**
See also:
Appointment notifications can be set in the admin interface. Please contact your administrator.

Linked Tickets
Tickets and other objects can be linked to the appointment with this section. Click on the Add Ticket button to see the ticket search.

Repeating Appointments

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

To create repeating appointments:

1. Select a Start date and End date (or check All day) for the first appointment in the series.
2. Select from the pre-defined occurrence frequencies in the Repeat field, or choose the Custom option.
3. Choose either a date to repeat the appointment until or a number of times to repeat it.

![Fig. 117: Repeating Appointments](image)

After all decisions are made and the settings are saved successfully, the appointment will be marked as a recurring appointment.

The parent appointment will be marked with an endless loop symbol, and the child appointments will have a chain symbol. This is only displayed in the appointment details when you hover the mouse over an appointment.
Fig. 118: Repeating Appointments Overview
Fig. 119: Repeating Appointments Details
Future changes to the parent appointment will affect the children automatically, without any further message. If an agent is about to change one of the child appointments, a message will ask what other appointments in the series they would like to update.

**This is a repeating appointment**

**Would you like to edit just this occurrence or all occurrences?**

![Fig. 120: Edit Repeating Appointment](image)

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

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

The enabled repeating option will be additionally displayed in the tool-tip of the related appointments.

### 1.13 Chat

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

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

#### 1.13.1 Chat Availability

To be able to use chats, chat availability needs to be set in the *Personalization* menu. In order to accept incoming chat requests from customer users, one or more chat channels must be selected in the *My Chat Channels* field of the *Notification Settings*.

The *People* widget in the *Dashboard* shows the names of users who are currently logged in. Users who are not logged in do not appear in this widget. A third screen shows users that are out of office.

A colored circle icon next to a user’s name indicates the status of chat availability.
Green circle
The user is available for internal or external chats.

Yellow circle
The user is away and the idle time defined in the system configuration has reached.

Red circle
The user is set as unavailable for chats. This can be the case when an agent has disabled the chat availability in the Personalization menu or if the chat has been deactivated in the system configuration.

An additional icon is displayed next to the name for starting a direct chat.

Note: This widget works differently than the People widget in a ticket detail view, which shows involved agents regardless of their chat status.

1.13.2 Chat Request List

The chat request list displays chat requests from customer users, public users and other agents. The list is accessible by hovering over the chat symbol in the organizer sidebar.

To accept the chat request, click on the Accept icon in the Action column.
1.13.3 Start New Chat

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

Agent to Agent

To start a chat with another agent:

1. Use the People widget in the dashboard. Agents who are able to chat will have a chat icon next to their name.

![Fig. 123: Available Agents](image)

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

3. Type an initial message in the Request Chat dialog, and click on the Create button to send the message.

![Fig. 124: Request Chat Dialog](image)

4. After the chat request has been sent to the other agent, a chat indicator will appear in the organizer sidebar. A browser notification is displayed to inform the other agent of the chat request.

5. Wait for the answer. The other agent has to accept the chat request with the Accept button.

6. When the other agent accepts the chat request, you can chat now.

Agent to Customer User

To start a chat with a customer user:

1. Use the People widget in the dashboard. Customer users who are logged in to the OTRS external interface and are able to use the chat will have a chat icon next to their name.

See also:

Customer users can also be selected in the customer user detail view or from the Customer User Information widget of the ticket detail view.
2. Click on the chat icon next to a customer user’s name.
3. Type an initial message in the Request Chat dialog, and click on the Create button to send the message.
4. After the chat request has been sent to the customer user, a chat indicator will appear in the organizer sidebar. A browser notification is displayed to inform the customer user about the chat request.
5. Wait for the answer. The customer user has to accept the chat request which is displayed in the bottom right corner of the external interface.
6. When the customer user accepts the chat request, you can chat now.
7. When the customer user closes the chat, it is possible to send the chat contents via email or create a ticket from the conversation.

Customer User to Agent

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

To receive a chat request from a customer user:

1. A customer user must login to the OTRS external interface and click on the New conversation button within the chat window in the bottom right corner of the external interface.
2. A notification is displayed in the organizer sidebar to inform the agent. Hover the mouse over the chat icon to open the chat requests list.
3. Accept the chat request.
4. When an agent accepts the chat request, they can chat now.
5. The customer user will see the answer.
Fig. 126: Agent to Agent Chat

Fig. 127: Available Customer Users
Visitors of the external interface are also not able to start a chat directly with a certain agent, but can only create generic chat requests. As they are not logged in, they need to add a name to start the chat.

The remaining steps are the same as described in the Customer User to Agent section.

### 1.13.4 Chat Bubble

Clicking on the conversations icon in the bottom right corner opens the list of conversations. This chat widget is the main component used when chatting with other people. It provides a history of all messages in the chat as well as a list of possible available actions, depending on your permission level.

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

The chat widget has some icons in the header bar.

The menu has several menu items.

**Append to ticket**

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

**Create phone ticket**

Allows you to create a phone ticket to which the current chat will be appended to as an article. After the ticket has been successfully created, the chat will get closed automatically. The phone ticket is explained in the Tickets chapter.
Fig. 130: Agent to Customer User Chat
Send a summary of this conversation to me.

lacey@example.org

Send

Or, create a new ticket with the summary.

Create Ticket
Lacey Green has joined this chat.
08/08/2023 14:19:05

Donec non finibus ipsum, at lobortis massa.
08/08/2023 14:19:05

Please bear with us until one of our agents is able to handle your chat request. Thank you for your patience.

Write a message.*

Fig. 132: Start Chat Window

Fig. 133: General Chat Requests From Customers Widget
Accept chat request

Chat Protocol

Lacey Green has joined this chat.
09/06/2022 14:19:05

Lacey Green

Donec non finibus ipsum, at lobortis massa.
09/06/2022 14:26:05

Change Chat Channel

Current Chat Channel
Proin viverra

Update Channel
Cancel
Accept

Fig. 134: Chat Preview Dialog
Lacey Green has joined this chat.
14 minutes ago

Donec non finibus ipsum, at lobortis massa.
14 minutes ago

John Smith has joined this chat.
3 minutes ago

Donec laoreet mi lorem, ut facilisis quam gravida a.
2 minutes ago

Write a message

Fig. 135: Customer User to Agent Response
Fig. 136: Customer User Chat
Fig. 137: Start Chat Window

Please bear with us until one of our agents is able to handle your chat request. Thank you for your patience.
Fig. 138: Chat Widget
Append to Ticket

Results (1 tickets)

Additional Filter

Customer user (exact match)

Owner

Please select your filter

Select Filter

Number  Title  Created  State  Queue

2015071510123456  Welcome to OTRS!  13 days ago  new  Raw

Chat Protocol

Nunc eget ante gravida, sodales erat a, sollicitudin lectus.
John Smith

08/08/2023 13:57:16

Lacey Green has joined this chat.
08/08/2023 14:02:24

Lacey Green

Nam facilisis ligula at lectus sagittis, eget condimentum purus imperdiet.
08/08/2023 14:02:47

Fig. 139: Append to Ticket
Invite

Allows you to invite another agent to this chat. You can select who you want to invite from a list of available agents. Once the agent has been invited, a new invitation request will be sent to this agent. After the request has accepted, the new agent will join the conversation.

1.14 Social Media Channels

This function provides additional communication channels for OTRS and connects Twitter as social media platform. Tweets can be created via OTRS and can be managed as tickets. Public comments to a tweet that is connected with a ticket appear as incoming articles in OTRS tickets. This allows to manage communication on social media platforms with OTRS and even to manage different social media channels in one ticket.

Note: This feature is available only for managed customers. A special contract is needed to use this feature.

Note: In order to use this feature a system administrator needs to setup the related social media profile configuration first.

1.14.1 Twitter

To create a new Twitter tweet ticket:

1. Go to the main menu and select Create Twitter Tweet Ticket.
2. Fill in the fields.
   In the ticket create screen, the Posting Details and the Communication sections can be used for Twitter tweet tickets.
3. Select a Twitter account.
4. Add a title. The title is only for internal purposes. It is the title of the corresponding ticket for a Twitter tweet.
5. Write the content of the message.
6. Click on the Create button after all relevant fields are filled.

This creates a new Twitter tweet and a ticket in OTRS containing the Twitter tweet as first article.

It is possible to add attachments of the following type:

- Photos (JPEG/WEBP/PNG, up to 4 files and up to 5 MB each)
- GIF
- Video (single file up to 15 MB)

The ticket create screen for Twitter tweet tickets contains the widget Twitter Account History. This widget shows all Twitter tweets that have been created for the selected Twitter account.

In the ticket detail view, the widgets Communication Compact and Communication Stream display all communications sent from OTRS to Twitter or sent from Twitter to OTRS with a Twitter icon in the column Channel.

The layout of a Twitter tweet is displayed within the article.
Fig. 140: Twitter Tweet Ticket Properties
All comments or retweets to a Twitter tweet that is connected with a corresponding ticket in **OTRS** are displayed as new article containing a [Comment] or [Tweet] in the beginning of the articles subject.

Replies to Twitter tweet can be send via OTRS using the article action **Reply via Comment**.

If a Twitter user likes a tweet that has been created with **OTRS**, then it will create a new version of the article in **OTRS**.

If a public user writes a direct message to a Twitter tweet that is connected with **OTRS** then the following happens:

- If there has been any communication between this user and OTRS and there is an open ticket for this customer user, the direct message is sent to the ticket with open state. If there are more than one open tickets, then the system sends it to the youngest ticket that has an open state.
- If there is no already existing communication with OTRS, the direct message will create a new ticket.

The direct messages are displayed as articles within the ticket.

All messages are displayed as new articles containing a [Message] in the beginning of the articles subject. OTRS agents can reply to direct messages by using the article action **Reply via Direct Message**.
1.15 Search

Use this menu item to search for something. The document search feature is available if you click on the magnification glass icon in the header bar.

The system remembers the previous searches, and they are displayed below the input field in the Recent Searches section. Enter a search term and you will get a search results preview in a few seconds. Selecting a previous search opens the Search Results screen immediately.

The results of the search are first presented as preview in an overlay weighted by the relevance of the search term. Clicking on a single entry in the list opens the detail view of the corresponding business object. The headlines of the section are also clickable and show the search results for the corresponding business object.

Click on the Show All button to display all results of the search. After clicking the Show All button in the overlay the results are presented in separate widgets per business object type. The Search Results screen is similar to the Personal Dashboard view.
Alternatively you can press the *Enter* key on your keyboard or click on the magnification glass icon to access the *Search Results* screen.

To find the desired object, open the filter section from the breadcrumb bar and use the filters to narrow the results. This section allows you to add fields of business objects, by which the search results list should be filtered. The filters can be saved as presets.

To apply a filter:

1. Open the filter section by clicking the filter icon in the breadcrumb bar.
2. Click on a business object in the *Search Filtering* section.
3. Select a *Field* of the business object.
4. Select an Operator. The operator depends on the selected field of the business object.

5. Select or enter a value.

6. Click on the Submit button.

The results are now displayed according to the filters specified. In this section it is also possible to add a custom label for the filter.

Several filter conditions can be applied and combined at the same time. To add another filter condition, repeat the steps explained above.

Each filter condition can be edited, disabled, removed or inverted. The inverted filter condition is displayed with red background.

Filter conditions can be saved as preset. The filter preset can be reused at any time. The usage of the filter preset is explained in the Navigation And Usage chapter.

The Search Results screen and its widgets can be configured as any other screen in OTRS.

### 1.15.1 Search Parameters

The query string consists of terms and operators. A term can be a single word or a phrase surrounded by double quotes. Operators allow you to customize the search.

**Single word**

If the query string is a single word (for example quick or brown), then OTRS searches for all items containing the given word.

If two or more words are given in the query string (for example quick brown), then OTRS searches for all items containing the word quick or brown.

**Phrase surrounded by double quotes**

If the query string contains a phrase surrounded by double quotes (for example "quick brown"), then OTRS searches for all items containing both the words in the phrase in the same order.

**Wildcards**

Use ? to replace a single character, and * to replace zero or more characters (for example qu?ck bro*).

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

**Regular expressions**

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

**See also:**

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

**Fuzziness**

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

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

Fuzziness can be disabled with quikc~0 which will not consider spelling mistakes.
Fig. 146: Search Filtering Action

**Search Filtering**

- **Bejegyzések (1)**
- **Jegyek (0)**

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

**Field**

- **Priority**

**Operator**

- **IS**

**Priority**

- **3 normal**

- **Add Custom Label**
- **Disable**

**Close Filter**  **Submit**

**CREATED**: more than 2 Year(s) ago

**QUEUE NOT**: Raw

- **Naptáridőpontok (0)**
- **Tudásbázis-bejegyzések (0)**
Proximity

The query string like "quick fox" searches the words in exactly the same order, but the proximity search allows that some other words can be included between the given words (for example "fox quick"~5).

This operator specifies the maximum edit distance of the words. The phrase quick fox would be considered more relevant than quick brown fox.

Ranges

This query string can contain ranges of dates, numbers or strings. Inclusive ranges are specified with square brackets [min TO max], and exclusive ranges are created with curly brackets {min TO max}.

Boosting

The boost operator ^ can be used to make one term more relevant than another. For example, use the query string quick^2 fox, if you want to find all documents about foxes, but you are especially interested in quick foxes.

You can also use boosts for phrases or groups, such as "quick fox"^2 AND (brown lazy)^4.

Boolean operators

The query string quick brown fox searches for all items containing one or more of the specified words.

The preferred operators are + (term must be present) and − (term must not be present). All other terms are optional.

For example if the query string is quick brown +fox −news then it means:

• fox must be present.
• news must not be present.
• quick and brown are optional.

The well known logical operators AND, OR and NOT (or &&, || and !) are also supported. The query string ((quick AND fox) OR (brown AND fox) OR fox) AND NOT news is identical to the previous example.

Grouping

Changing the precedence with parentheses is possible, like (quick OR brown) AND fox.

Reserved characters

There are some reserved characters which function as operators, and they can not be used in search queries.

The reserved characters are: + − = && || > < ! ( ) { } [ ] ^ " ~ * : \ /.

If any of these characters need to be used in search queries, then you should escape them with a leading backslash. For example to search for the term $(1+1)=2$, you have to use the query string as $(1\backslash1+1\backslash)=2$.

See also:

More information can be found in the query string syntax chapter of the Elasticsearch documentation.
1.16 Mobile App

The OTRS mobile app offers you the possibility of using the OTRS agent interface on a mobile device. The app supports multiple accounts with one-tap switching. Furthermore, the app supports two-factor authentication methods.

The OTRS mobile app is available in the Google Play Store and Apple App Store.

The usage of OTRS on a mobile device is the same as in the browser. This chapter only describes how to link the app with an OTRS account.

1.16.1 Manage Accounts

After starting the app, the account management screen is displayed and lists the connected OTRS instances. It is possible to use multiple OTRS instances for your job. As you add an account, the related OTRS instance will also be added and listed on the account management screen.

To add an account:
1. Tap the Add New button.
2. Fill in the required fields.
3. Tap the Save button.

The app now establishes connection with the web server and checks if everything is in order. After successfully being added, the account is displayed on the account management screen.

To edit an account:
1. Tap the Edit icon in the title bar.
2. Tap the Edit button next to an account.
3. Modify the fields.
4. Tap the Save button.

To remove an account:
1. Tap the Edit icon in the title bar.
2. Tap the Remove button next to an account.
3. Confirm the message by tapping OK button.

1.16.2 Using the App

After installing the app and linking a new account, OTRS can be used like it would be in a browser.

To log in to an account, simply tap on it once in the list. The app will log in using the supplied credentials and show the dashboard of OTRS.

Note: In case the account has any of the two-factor authentication methods setup, you will be asked to complete the authentication challenge in order to log in.
Fig. 147: Account Management Screen

You have nothing to display. Press the "+" icon to add an entry.

ADD NEW
Fig. 148: Link Account Screen
1.16. Mobile App

Fig. 149: Edit or Remove Account
Fig. 150: Dashboard on a Mobile Device
Note: Single sign-on (SSO) is not supported with the mobile app.

The app contains a title bar where the name of the OTRS instance is displayed. The arrow icon in the top left corner switches you back to the account management screen. The arrows in the top right corner can be used to switch back and forward within the views of OTRS.

The organizer sidebar is collapsed and can be expanded together with the main menu by tapping the main menu icon in the top left corner.

For reasons of space, the icons in the breadcrumb bar are not displayed when the mobile device is in portrait mode. In order to display the actions, the mobile device needs to be turned into landscape mode.

A small icon in the breadcrumb bar indicates to turn the mobile device into landscape mode.
Fig. 151: Organizer Sidebar and Main Menu
Fig. 152: Portrait Mode
<table>
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<tr>
<th>Queue</th>
<th>new</th>
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<tr>
<td>Postmaster</td>
<td>14</td>
<td>0</td>
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<td>Raw</td>
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</tr>
<tr>
<td>Total</td>
<td>44</td>
<td>0</td>
<td>0</td>
<td>44</td>
</tr>
</tbody>
</table>

Fig. 153: Landscape Mode
CHAPTER TWO

EXTERNAL INTERFACE

2.1 Login to the External Interface

The external interface is available at the following location.

https://<OTRS_HOST>/external

Note: You have to replace <OTRS_HOST> with your domain.

You need a customer user account to be able to use OTRS. If you do not have an account yet, please contact your administrator or follow the steps for creating an account described in the section below.

2.1.1 Login

To login with an existing account:

1. Go to the login page.
2. Fill in the required fields.
3. Click on the Login button.

2.1.2 Create Account

Depending on the settings there are two possibilities to register a new account.

To create an account via the form:

1. Click on the Login button in the upper right corner.
2. Click on the Register now link.
3. Fill in the fields.
4. Click on the Register button.

The login information will be sent to the provided email address. Log in with the password sent in the email. After logging in, you will be asked to change your password.

To create an account via email:

1. Click on the registration link.
Fig. 1: Login

You do not have an account yet? Register now.

Have you forgotten your password?
Fig. 2: Create Account

Create Account

Your first name*

Your last name*

Your email address*

This will become your username.

Register

You already have an account? Log in instead.
2. The email client opens with a pre-configured text.
3. Send the email.

### 2.1.3 Change Password

![Change Password Form]

**Change password**

Please secure your account and change your password.

**User Input:**
- Enter your new password
- Re-enter your new password

**Requirements:**
- The password must contain at least 8 characters
- 2 uppercase
- 2 lowercase
- 1 digit

**Buttons:**
- Cancel
- Change

---

1. Fill in the fields.
2. Click on the Change button.

After changing your password, you will be asked to set up two-factor authentication.
2.1.4 Two-factor Authentication

Choose your preferred authentication method.
Click on the Next button.

Note: If you select email as the authentication method, you have the option to enable email security. This means that the email is encrypted and signed when the data is sent.

Depending on the selected authentication method, the code will be displayed in the app or in the email.

1. Enter the code in the field.
2. Click on the Verify button.

2.2 Home Page

![Fig. 5: Homepage for Logged in User](image)

**Meta Navigation Bar**

The meta navigation bar contains the login link for customer users. It can also contain other custom links depending on the settings made by the system administrator.

**Primary Navigation Bar**

The primary navigation bar contains a link to the knowledge base and can also contain other custom links depending on the settings made by the system administrator.

**Main Section**

The main section contains the search field and can be used to display information, such as a welcome message.

**Link List**

The link list section can be used to create boxes that contain a collection of useful links.

**Image Teaser**

The image teaser section can be used to show boxes that contain pictures and links.

**Content Card**

The content card section can be used to show boxes that contain teaser text and links to further
Footer Bar

The footer bar section contains a drop-down menu for selecting the language of the external interface. In the bottom right corner is the chat icon. Clicking on this icon will open the chat function of the external interface.

Note: This picture shows only the original state of the software with example content. The content of your external interface may vary depending on the settings made by the system administrator.

2.3 Main Navigation and Footer

Fig. 6: Main Navigation

The main navigation area contains the following links and symbols for a logged in customer user.

My Tickets
This link guides users to the view Ticket List.

New Ticket
This link guides users to the view Create New Tickets.

Ticket Notifications
This link guides users to the view Ticket Notifications.

Username
This menu displays the Personal Preferences and a logout option when the customer user hovers over the user name in the main navigation.

Knowledge Base
This link guides users to the view Knowledge Base.

Service Catalog
This link guides users to the view Service Catalog.

Custom Links
These links can be used to guide users to Custom Pages.
2.4 Personal Preferences

The personal preferences screen contains the sections General and Security.

**Note:** The content of your Personal Preferences may vary depending on the settings and the installed packages.

2.4.1 General

![Personal Preferences - General](image)

In the section General, the customer user can change the avatar image, the language of the external interface and the preferred timezone.

2.4.2 Security

In the section Security, the customer user can change the password and the two-factor authentication settings.
2.4. Personal Preferences

Fig. 8: Personal Preferences - Security
2.5 Create New Tickets

In this view, a customer user can create new tickets. The fields Subject and Message are mandatory fields. The field Attachment can be used optionally for adding attachments to the ticket.

The text editor of the Message field offers the following options:

- Marking text as bold or italic
- Adding links
- Adding a numbered or a bulleted list
- Text alignment
- Inserting block quotes
- Inserting tables
- Inserting pictures

Related knowledge base articles are displayed based on the keywords entered in the Subject and/or the Message fields. Clicking on a knowledge base article opens the Knowledge Base screen.

The related knowledge base articles are displayed as the customer user types, so the list of suggested knowledge base articles is updated after any word typed into the Subject and/or the Message fields. The
suggested knowledge base articles are sorted based on the number of matched keywords.

After creating the ticket and clicking the Create Ticket button, the customer user is taken to the Ticket List view. The created ticket is displayed in the list view next to any other already-created tickets.

Now, the newly-created ticket will appear as a new ticket in the agent interface views.

Process tickets can also be created in the Create New Tickets view if there are available processes deployed in the system. The relevant process can be selected in the drop-down menu.

![Create New Ticket](image)

Fig. 10: Create Process Ticket

After selecting a process, the view for creating tickets is opened and the process ticket can be created. The editable fields in this view are defined by the relevant process.

### 2.6 Ticket List

The ticket list displays the tickets of the logged in customer user and the company tickets. The Search field in this section enables the customer user to search for certain tickets by ticket title or ticket number.

Tickets with bold texts have unread articles. The colored circles in the first column have the following meanings:

- Blue circle = Open tickets with read or unread articles.
- Grey circle = Closed tickets.

**Note:** The columns shown in the ticket list can be defined in the administrator interface. It is possible to define if the title of the ticket should be shown or if the last subject should be used instead. It is possible to add additional columns, like Owner, Queue or Dynamic Fields.

**Note:** The color can be different if a corporate design is applied to the external interface by the administrator.
2.6.1 My Tickets

The view in this section shows tickets that have been created by the currently logged in customer user.

All Tickets
This view shows all tickets of the currently logged in customer user.

Fig. 11: My Tickets - All Tickets

Open Tickets
This view shows all tickets of the currently logged in customer user that are not yet closed. Pending tickets are also displayed here.

Closed Tickets
This view shows all tickets of the currently logged in customer user that are in Closed status.

2.6.2 Company Tickets

The view in this section shows all tickets assigned to a certain customer. All customer users assigned to this certain customer can see the content in this list.
Fig. 12: My Tickets - Open Tickets

Fig. 13: My Tickets - Closed Tickets

2.6. Ticket List
2.7 Ticket Detail View

The ticket detail view displays the complete communication within the ticket. The articles are displayed in a list that, by default, starts with the first article. On the right side, the following ticket information is displayed by default:

- State
- Ticket number
- Queue
- Priority

At the end of the article list is the section for writing a response to the ticket. The *Respond to This Ticket* button on the right side scrolls the user directly to the response section of the view. The *Print Ticket* button makes it possible to download the ticket as PDF file.

2.8 Ticket Notifications

The ticket notifications inform the logged in customer user about:

- Newly created tickets related to the customer user
- Responses from agents to the customer user’s tickets
- State changes of a ticket

The bell icon in the meta navigation bar informs the customer user about new unread ticket notifications. If the bell icon has an additional green circle, there are new unread notifications. When the customer user hovers over the icon, a short overview of the last five ticket notifications is displayed.

The customer user can mark them as read or open the view *My Notifications*.

**My Notifications**

This view displays all notifications with their date and time, regardless of whether they are marked as read or unread. Unread notifications have bold titles. When the customer user hovers the mouse over an entry in the list, the entry is highlighted.

If the customer user clicks on an entry, the corresponding ticket is displayed in the *Ticket Detail View*. If the customer user clicks on the blue circle next to the title the ticket notifications can be set to read or unread.

2.9 Service Catalog

The service catalog section can be used to display service catalog information and to categorize the information. The service catalog categories are shown in alphabetical order on the left side of the view.

In addition to plain text, the service catalog entries can also contain links to other pages. For entries with links, item title and text are highlighted when the customer user hovers over the entry. If the customer user clicks the hovered-over entry, he will be guided to the linked page.

If subcategories are defined within a category, the subcategories are shown if the customer user hovers over a category.
Fig. 14: Ticket Detail View
Fig. 15: Notification Screen on Hover

Fig. 16: My Notifications
2.9. Service Catalog

Cafè  >  Bank Account
In case you want to change your Bank Account, please let the HR department know the new IBAN and the BIC.
HR Services

HR Services
Ordering Office Material
Whenever you need to order new office materials, you can use this service.

Fig. 17: Service Catalog

Fig. 18: Catalog with Subcategories
Note: If there are items that are not assigned to a category, these items are displayed first when the view is called up. If all items are assigned to categories, the items that have been clicked on the most are displayed first.

## 2.10 Knowledge Base

The knowledge base area can be used to display knowledge base articles for customers and customer users. The knowledge base articles can be grouped into categories.

Note: To display a knowledge base article in the external interface, the state of the article needs to be *External (customer)* or *Public (all)*. If the state is set to *External (customer)*, the knowledge base article will be shown only for logged in customer users. If the state is set to *Public (all)*, the knowledge base article will also be visible users who are not logged in.

Clicking on an article title opens the detail view of the article. The detail view of the article can contain the sections:

- Symptom
- Problem
Fig. 20: Knowledge Base Article

• Solution
• Rating

Note: The sections Symptom, Problem and Solution are only displayed if the corresponding field is filled with text when the article is created.

At the end of the article, the customer users can vote for the article. The results of the votes are displayed in the knowledge base article detail views.

2.11 Search

The search engine for the search function uses the functionality of Elasticsearch. Customers can use the search function to find a relevant terms in:

• Tickets
• Articles
• Knowledge base articles
• Contents of service catalogs
• Contents of custom pages
2.12 Custom Pages

The links on custom pages can be used to link to other web pages. The content allowed on custom pages depends on the settings that a system administrator has made.

2.13 Chat

Customer users are not able to start a chat directly with a certain agent, but can only create generic chat requests. The agents can also send chat requests to customer users.

2.13.1 Customer User to Agent

To start a chat with an agent:

1. Click on the New conversation button within the chat window in the bottom right corner of the external interface.
2. Select the relevant chat channel, if there are defined chat channels.
3. Type an initial message for the chat request.
4. When an agent accepts the chat request, the chat will open and you can type your messages.

2.13.2 Public User to Agent

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

The remaining steps are the same as described in the Customer User to Agent section.

Agent to Customer User

To receive a chat request from an agent:

1. An agent types an initial message to create a chat request.
2. A browser notification is displayed to inform you. You have to accept the chat request which is displayed in the bottom right corner of the external interface.
3. When you accept the chat request, you can chat now.
4. When you close the chat, it is possible to send the chat via email or to create a ticket from the conversation.
Lacey Green has joined this chat.
08/08/2023 14:19:05

Donec non finibus ipsum, at lobortis massa.
08/08/2023 14:19:05

Please bear with us until one of our agents is able to handle your chat request. Thank you for your patience.

Fig. 21: Start Chat Window
Fig. 22: Customer User Chat
2.13. Chat

Fig. 23: Start Chat Window

John Doe has joined this chat.
08/08/2023 12:35:42

Sed sit amet mauris blandit, tincidunt urna ut.
08/08/2023 12:35:42

Please bear with us until one of our agents is able to handle your chat request. Thank you for your patience.

Write a message.*

Fig. 24: Chat Request on External Interface

John Smith
Nunc eget ante gravida, sodales erat a, sollicitudin le…
Fig. 25: Agent to Customer User Chat
Send a summary of this conversation to me.

lacey@example.org

Send

Or, create a new ticket with the summary.

Create Ticket
3.1 Accessibility Statement

The OTRS AG endeavors to ensure accessibility of its web application OTRS 8 in accordance with German legislation. The legal basis is the German Act on Equal Opportunities for Persons with Disabilities (Behinderungsgleichstellungsgesetz, BGG) as well as the Accessible Information Technology Ordinance (Barrierefreie Informationstechnik-Verordnung, BITV 2.0) as amended. This accessibility statement is applicable to the web application OTRS 8 stating the OTRS AG as the editor in the legal notice section.

OTRS 8 has built-in high contrast themes for users with visual disabilities.

To activate the high contrast themes:

1. Open the Personalization menu.
2. Select the User Profile menu item.
3. In the Style section, select either High Contrast Bright or High Contrast Dark style.

3.1.1 Current Compatibility with Requirements

The web application is not fully compatible with the accessibility requirements pursuant to section 3 (1) to (3) and section 4 of the Ordinance on Accessible Information Technology (BITV 2.0).

The following contents of the web application OTRS 8 is not fully accessible for the reasons stated below:

**Success Criterion 1.3.1 Info and Relationships [Level A]**
Fonts marked in bold are displayed with a different font style and controlled with CSS. Not all text fragments are enclosed with `p`, but with `span`.

**Success Criterion 2.1.1 Keyboard [Level A]**
The calendar in the Grid view cannot be scrolled with the keyboard, but the Agenda and Timeline views work properly.

**Success Criterion 3.2.2 On Input [Level A]**
With some forms (e.g. creating statistics or selecting a process), new form elements are dynamically added below the existing form in the visible area after certain form elements have been selected.
### 3.1.2 Issuance of This Accessibility Statement

This statement was issued on 23 February 2021. The verification of its compliance is based on an BITV self-assessment, which was completed in December 2020.

### 3.1.3 Report Barrier: Feedback and Contact

Would you like to inform us about existing barriers or ask for information about what is being done to ensure that our website is accessible? Please send us an email to product@otrs.com.

### 3.2 Keyboard Shortcuts

**Dashboard**
- Personal Dashboard (d)
- Statistics and Reports (v)
- Calendar Overview (c)

**Tickets**
- Start Process (p)
- Take Phone Call (n)
- Send Email (m)
- Send SMS (b)
- Show Unresolved (o)
- Show Unlocked (l)
- Show Reached Reminders (r)
- Show Escalations (e)
- Show Recently Created (t)
- Show Recently Closed (z)

**Knowledge Management**
- Add Knowledge (k)
- Show Recently Added (a)
- Show Recently Updated (u)
- Show Highest Rated (h)

**Customer Management**
- Create Customer (y)
- Create Customer User (x)

**Calendar**
- Add Appointment (j)

**Administration**
• Open Administrator Dashboard (f)
• Open System Configuration (g)
• Manage Contacts with Data (q)

Search

• Start a search (s)

See also:
The accesskey activation depends on the browser and the used platform. Please refer to the acceskey chapter in MDN Web Docs for more information.