



OTRS User Manual

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OTRS AG

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AGENT INTERFACE

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.

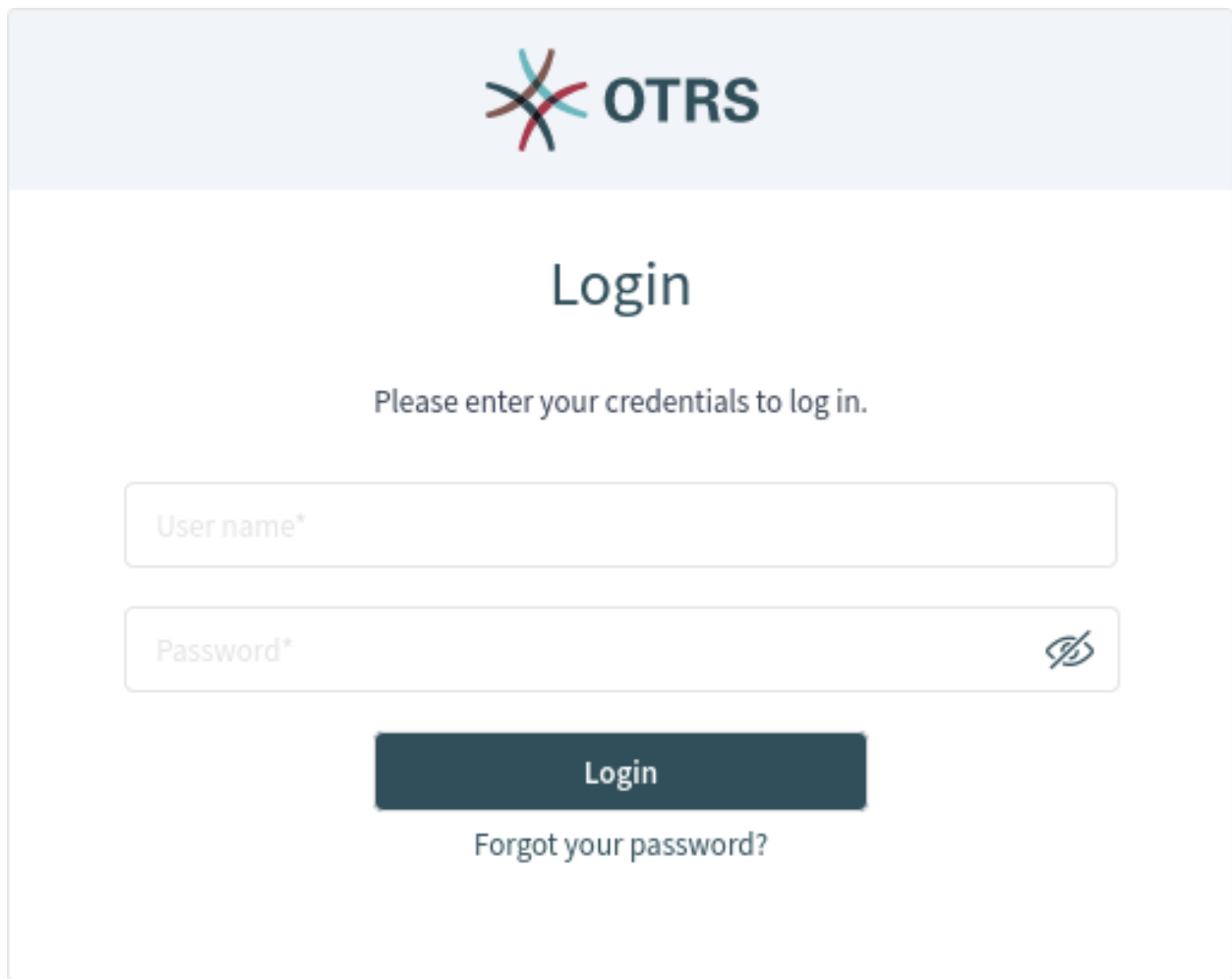
The two-factor token will be sent to the email address of the agent, or the agent can use an authenticator application.

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.

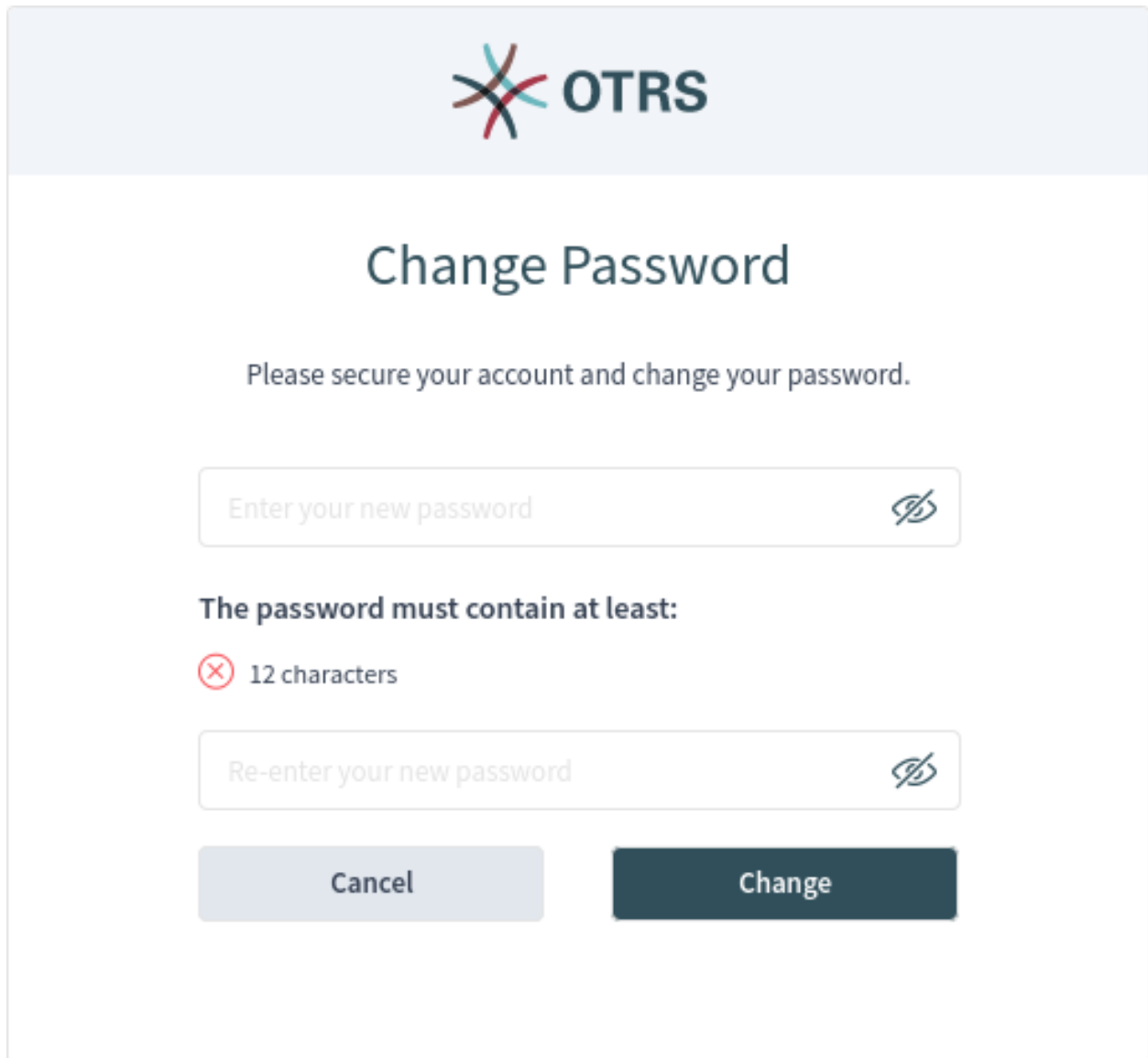
Check your mailbox and find the email containing the two-factor token. The token consists of numbers. Type the token into the next window.

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



The image shows the OTRS Agent Login screen. At the top, there is a light blue header bar containing the OTRS logo, which consists of a stylized star-like icon made of four colored lines (red, green, blue, and yellow) and the text "OTRS" in a bold, dark blue font. Below the header, the word "Login" is centered in a large, dark blue font. Underneath "Login", the text "Please enter your credentials to log in." is centered in a smaller, dark grey font. There are two input fields: the first is labeled "User name*" and the second is labeled "Password*". The "Password*" field has a small icon of an eye with a diagonal line through it, indicating a toggle for password visibility. Below the input fields is a dark blue button with the word "Login" in white text. At the bottom, the text "Forgot your password?" is centered in a dark grey font.

Fig. 1: Agent Login Screen




The image shows a web form for changing a password. At the top, there is a header bar with the OTRS logo, which consists of a stylized star-like icon made of four colored lines (red, green, blue, and yellow) and the text "OTRS" in a bold, sans-serif font. Below the header, the main heading "Change Password" is centered in a large, dark font. Underneath the heading, a message reads "Please secure your account and change your password." in a smaller, gray font. The form contains two input fields for passwords, each with a placeholder text "Enter your new password" and "Re-enter your new password" respectively, and a toggle icon (an eye with a slash) to the right of each field. Below the second input field, there is a list of requirements for the password, starting with "The password must contain at least:" followed by a red circle with a white 'x' icon and the text "12 characters". At the bottom of the form, there are two buttons: a light gray "Cancel" button and a dark blue "Change" button.


OTRS


Change Password

Please secure your account and change your password.

Enter your new password 


The password must contain at least:

 12 characters

Re-enter your new password 

Cancel **Change**

Fig. 2: Change Initial Password



Request New 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

Cancel



Request New Password

Fig. 3: Request New Password Screen



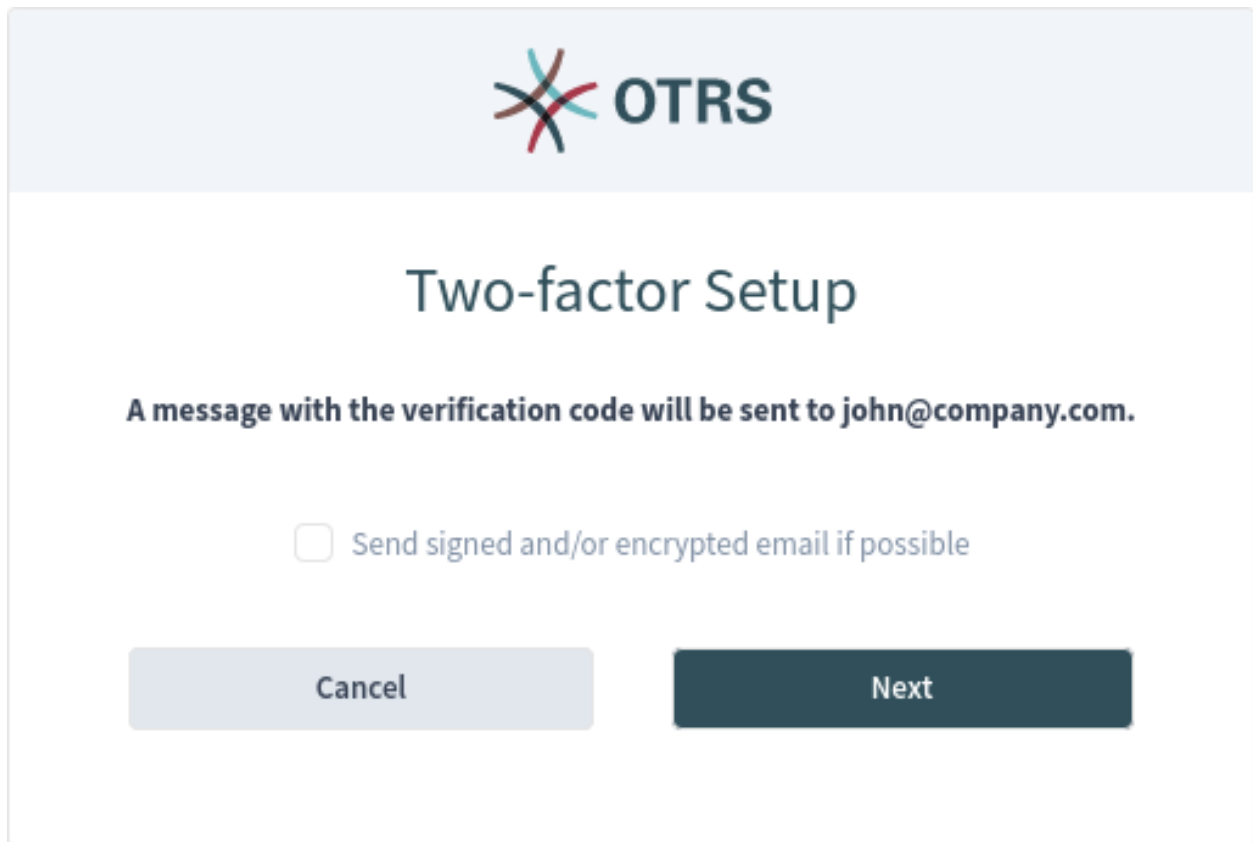
Two-factor Authentication

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



The image shows a web interface for OTRS Two-factor Setup. At the top, there is a header bar with the OTRS logo (a stylized star) and the text "OTRS". Below the header, the main heading is "Two-factor Setup". Underneath, a message states: "A message with the verification code will be sent to john@company.com." Below this message is a checkbox labeled "Send signed and/or encrypted email if possible". At the bottom, there are two buttons: "Cancel" (light blue) and "Next" (dark blue).

OTRS

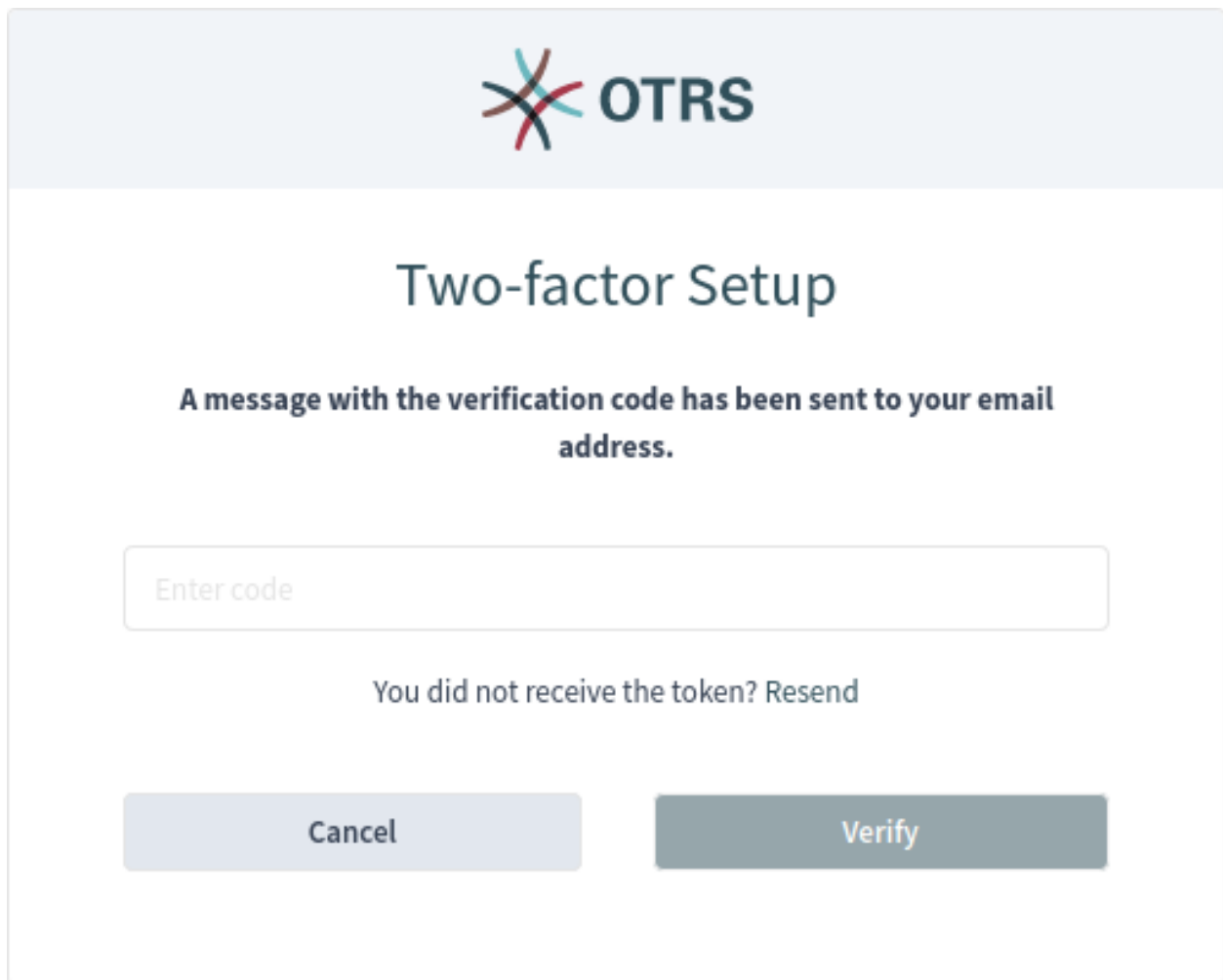
Two-factor Setup

A message with the verification code will be sent to john@company.com.

☐ Send signed and/or encrypted email if possible

Cancel Next

Fig. 5: Two-factor Setup for Email



The image shows a web interface for OTRS Two-factor Setup. At the top, there is a header bar with the OTRS logo, which consists of a stylized star-like icon made of four colored lines (red, green, blue, and yellow) and the text "OTRS" in a bold, sans-serif font. Below the header, the main content area has a white background. The title "Two-factor Setup" is centered in a large, dark blue font. Below the title, a message in bold black text states: "A message with the verification code has been sent to your email address." Underneath this message is a text input field with a light gray border and the placeholder text "Enter code" in a light gray font. Below the input field, the text "You did not receive the token? Resend" is displayed in a smaller, dark gray font. At the bottom of the form, there are two buttons: a light gray button labeled "Cancel" and a darker gray button labeled "Verify".

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.

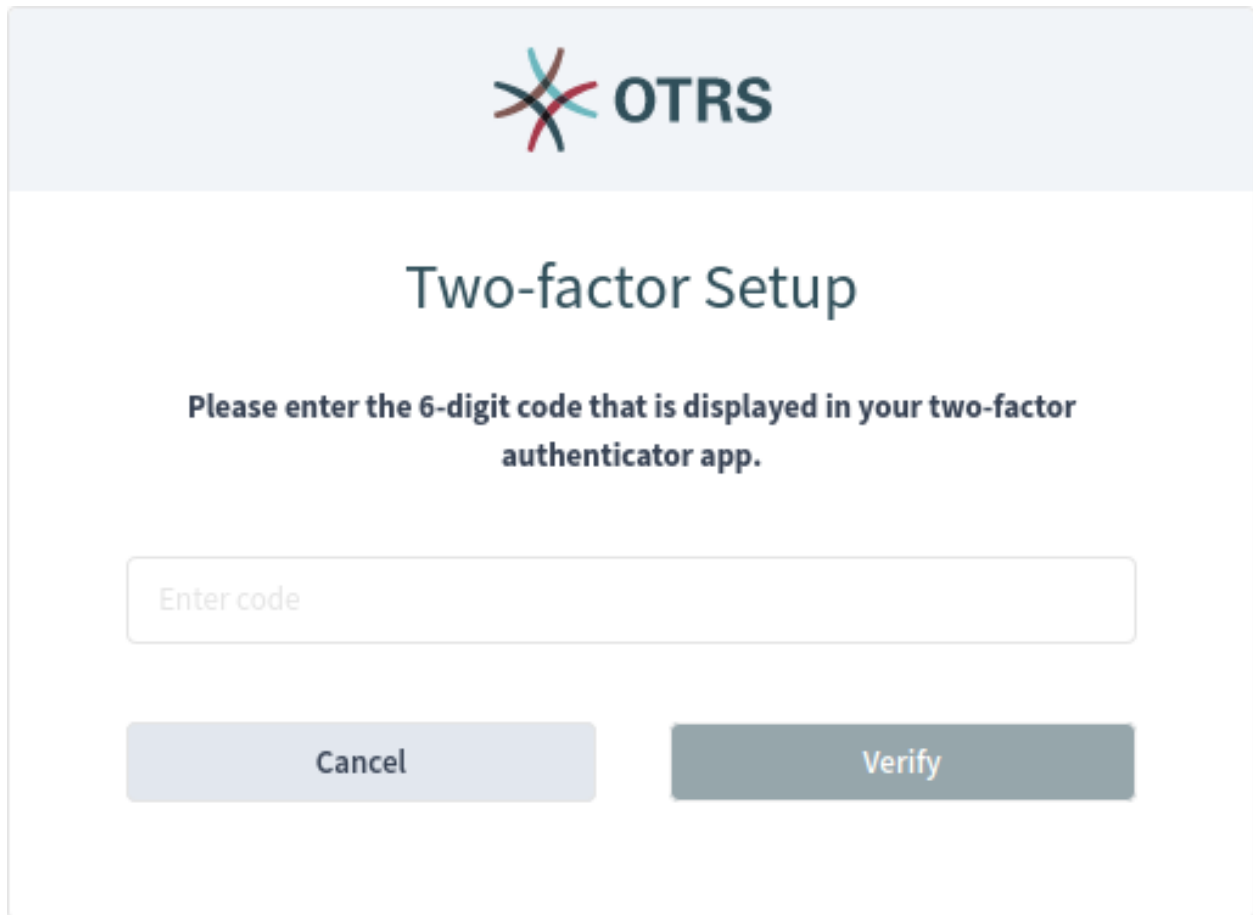


Unable to scan the code?

Cancel

Next

Fig. 7: Two-factor Setup for Authenticator App



The image shows a web interface for OTRS Two-factor Setup. At the top, there is a header bar with the OTRS logo, which consists of a stylized 'X' made of four colored lines (red, blue, green, and yellow) and the text 'OTRS' in a bold, sans-serif font. Below the header, the main content area has a light gray background. The title 'Two-factor Setup' is centered in a large, dark gray font. Below the title, there is a bold instruction: 'Please enter the 6-digit code that is displayed in your two-factor authenticator app.' Underneath this instruction is a text input field with the placeholder text 'Enter code'. At the bottom of the form, there are two buttons: a light gray 'Cancel' button on the left and a dark gray 'Verify' button on the right.

Fig. 8: Two-factor Setup Authenticator App Verification

The screenshot displays the OTRS Personal Dashboard. The top navigation bar includes a user profile, a menu icon, a notification bell, a search icon, and a plus sign. The OTRS logo is in the top right corner. The dashboard is divided into several sections:

- Dashboard:** A section with a scroll-to dropdown and a settings icon.
- Queue Metric:** A table showing queue metrics for new, open, pending reminder, and total counts.
- Escalations:** A section with a 'Select Preset' dropdown and a settings icon, currently showing 'Currently no data available.'
- Reminders:** A section with a 'Select Preset' dropdown and a settings icon, currently showing 'Currently no data available.'

The Queue Metric table data is as follows:

Queue	new	open	pending reminder	Total
Junk	13	0	0	13
Postmaster	13	0	0	13
Raw	17	0	0	17
Total	43	0	0	43

Fig. 9: Personal Dashboard

This screenshot is identical to the one above, showing the OTRS Personal Dashboard with the same layout and data.

The Queue Metric table data is as follows:

Queue	new	open	pending reminder	Total
Junk	13	0	0	13
Postmaster	13	0	0	13
Raw	17	0	0	17
Total	43	0	0	43

Fig. 10: Personal Dashboard

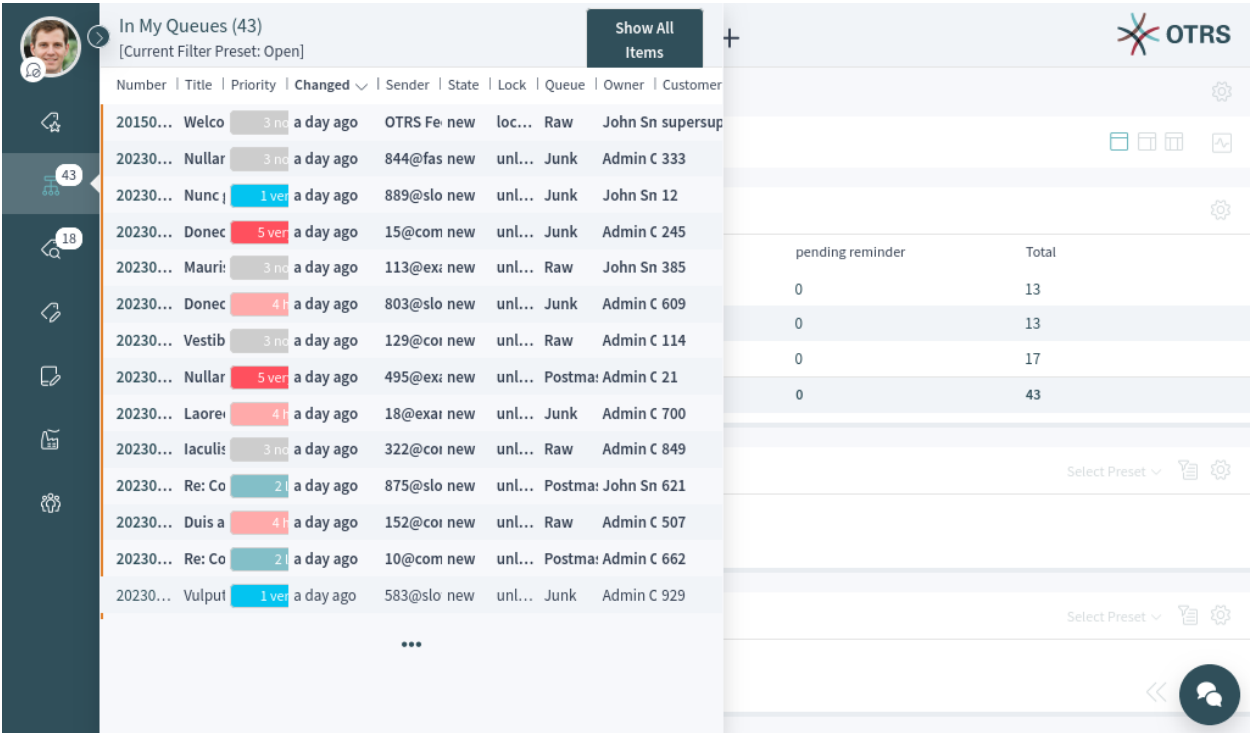


Fig. 11: Business Object List Preview

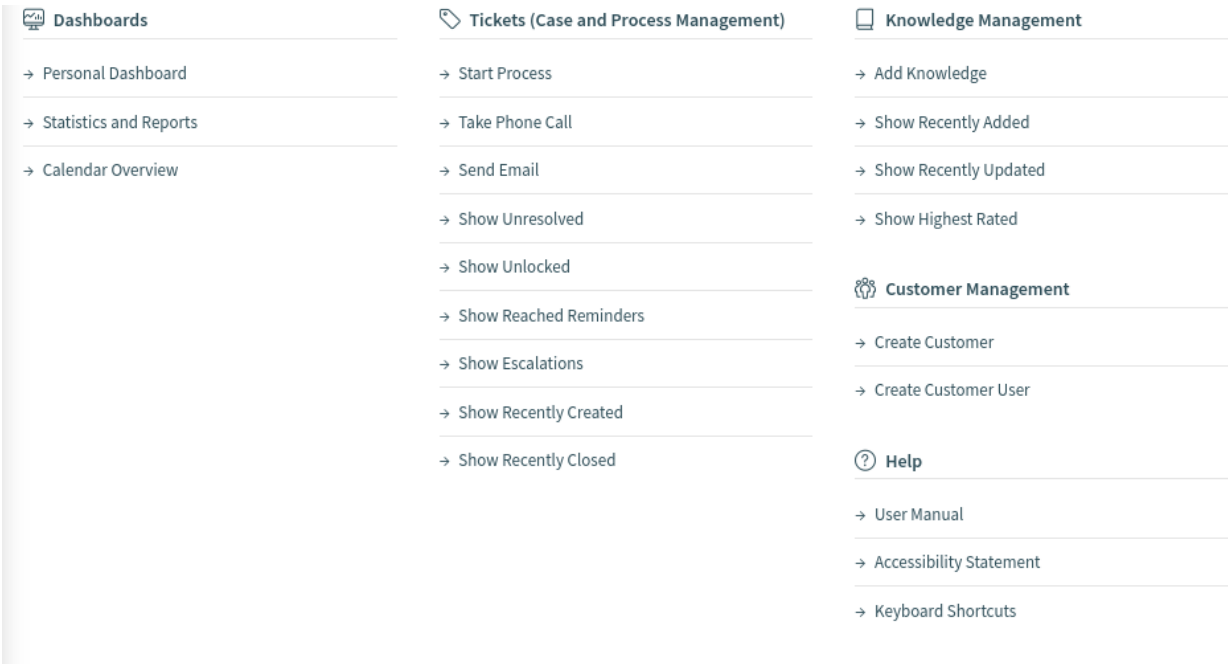


Fig. 12: Main Menu



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.

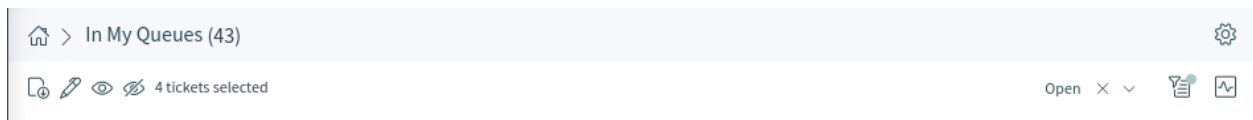


Fig. 14: Breadcrumb Bar For Business Object List

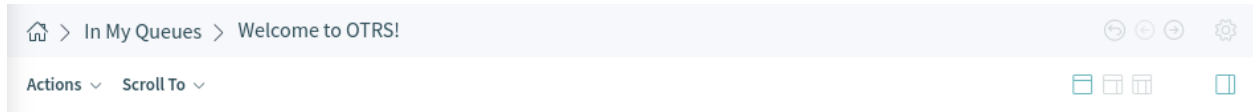


Fig. 15: Breadcrumb Bar For Business Object Detail View

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](#).

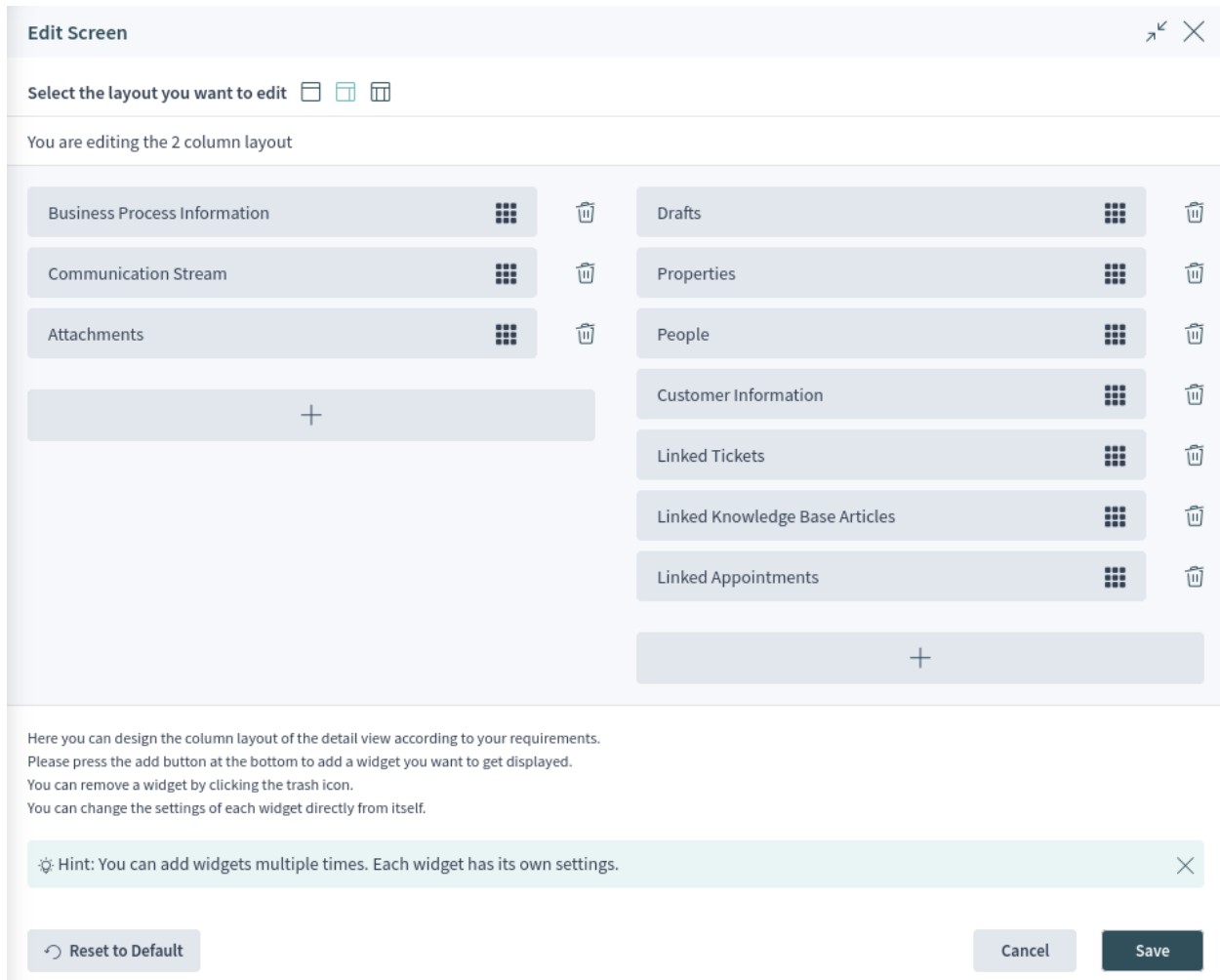


Fig. 16: Screen Configuration For Two-column Layout

1.2.2 Business Objects

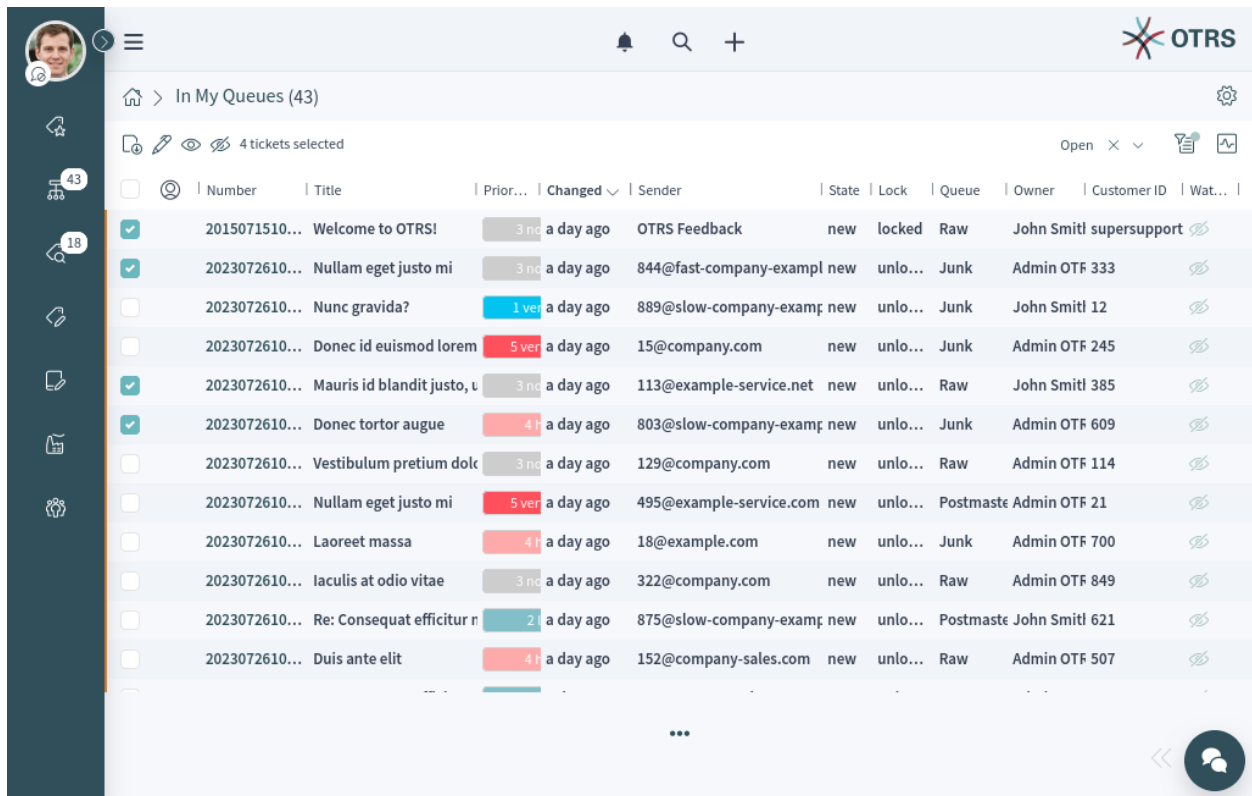
All components in **OTRS** are called business objects. Business objects can be:

- 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.



The screenshot shows the OTRS web interface. On the left is a dark sidebar with navigation icons and a user profile. The main area is titled 'In My Queues (43)' and shows a list of 13 tickets. Each ticket row includes a checkbox, a status icon (e.g., '3 new', '1 verified', '5 verified'), a title, a priority, a time indicator ('a day ago'), a sender, a state, a lock status, a queue name, an owner, and a customer ID. The interface also includes a search bar, a plus icon for more options, and a settings gear icon.

	Number	Title	Prior...	Changed	Sender	State	Lock	Queue	Owner	Customer ID	Wat...
<input checked="" type="checkbox"/>	2015071510...	Welcome to OTRS!	3 new	a day ago	OTRS Feedback	new	locked	Raw	John Smitl	supersupport	
<input checked="" type="checkbox"/>	2023072610...	Nullam eget justo mi	3 new	a day ago	844@fast-company-exampl	new	unlo...	Junk	Admin OTF	333	
<input type="checkbox"/>	2023072610...	Nunc gravida?	1 verified	a day ago	889@slow-company-examf	new	unlo...	Junk	John Smitl	12	
<input type="checkbox"/>	2023072610...	Donec id euismod lorem	5 verified	a day ago	15@company.com	new	unlo...	Junk	Admin OTF	245	
<input checked="" type="checkbox"/>	2023072610...	Mauris id blandit justo, u	3 new	a day ago	113@example-service.net	new	unlo...	Raw	John Smitl	385	
<input checked="" type="checkbox"/>	2023072610...	Donec tortor augue	4 verified	a day ago	803@slow-company-examf	new	unlo...	Junk	Admin OTF	609	
<input type="checkbox"/>	2023072610...	Vestibulum pretium dolo	3 new	a day ago	129@company.com	new	unlo...	Raw	Admin OTF	114	
<input type="checkbox"/>	2023072610...	Nullam eget justo mi	5 verified	a day ago	495@example-service.com	new	unlo...	Postmast	Admin OTF	21	
<input type="checkbox"/>	2023072610...	Laoreet massa	4 verified	a day ago	18@example.com	new	unlo...	Junk	Admin OTF	700	
<input type="checkbox"/>	2023072610...	Iaculis at odio vitae	3 new	a day ago	322@company.com	new	unlo...	Raw	Admin OTF	849	
<input type="checkbox"/>	2023072610...	Re: Consequat efficitur n	2 verified	a day ago	875@slow-company-examf	new	unlo...	Postmast	John Smitl	621	
<input type="checkbox"/>	2023072610...	Duis ante elit	4 verified	a day ago	152@company-sales.com	new	unlo...	Raw	Admin OTF	507	

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.

Export 4 Tickets

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

*** Columns for Export**

☒ Live People

☒ Number

☒ Title

☒ Priority

☐ Created

☐ Age

☒ Changed

☐ Pending till

☐ Escalation Time

☐ Update Time

☐ First Response Time


☐ Solution Time

☒ Sender

☐ Subject

☒ State

*** Export Format**

CSV 

Cancel

Download File

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

<input type="checkbox"/>	Number	Title	Priority
<input type="checkbox"/>	2020032510000383	What is the real questions?	3 normal
<input type="checkbox"/>	2020032510000427	Why am I here?	1 very low
<input type="checkbox"/>	2020032510000347	Why am I here?	2 low
<input type="checkbox"/>	2020032510000365	What a wonderful day!	4 high
<input type="checkbox"/>	2020032510000338	some subject alalal	5 very high
<input type="checkbox"/>	2020032510000356	Why am I here?	3 normal

Priority

2 low

Cancel

Save

2 low

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

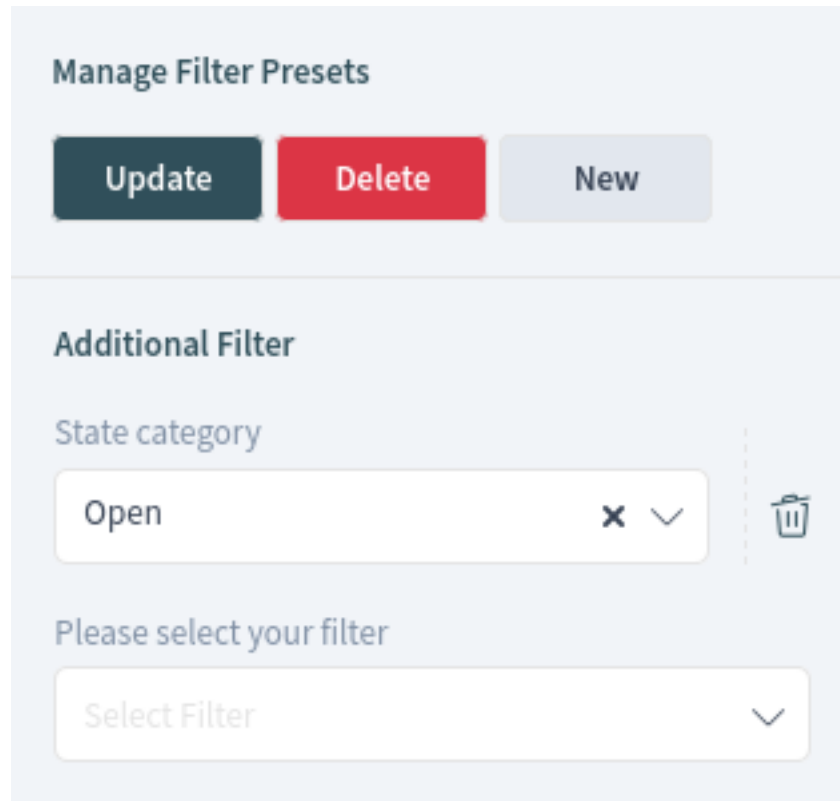


Fig. 22: Business Object List Filter Preset

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.

Manage Filter Presets

! You have unsaved changes.

Save

Additional Filter


State

open

x

x

▼




Owner

John Smith

x

x

▼



Please select your filter

Select Filter

▼

Fig. 23: Business Object List Filter

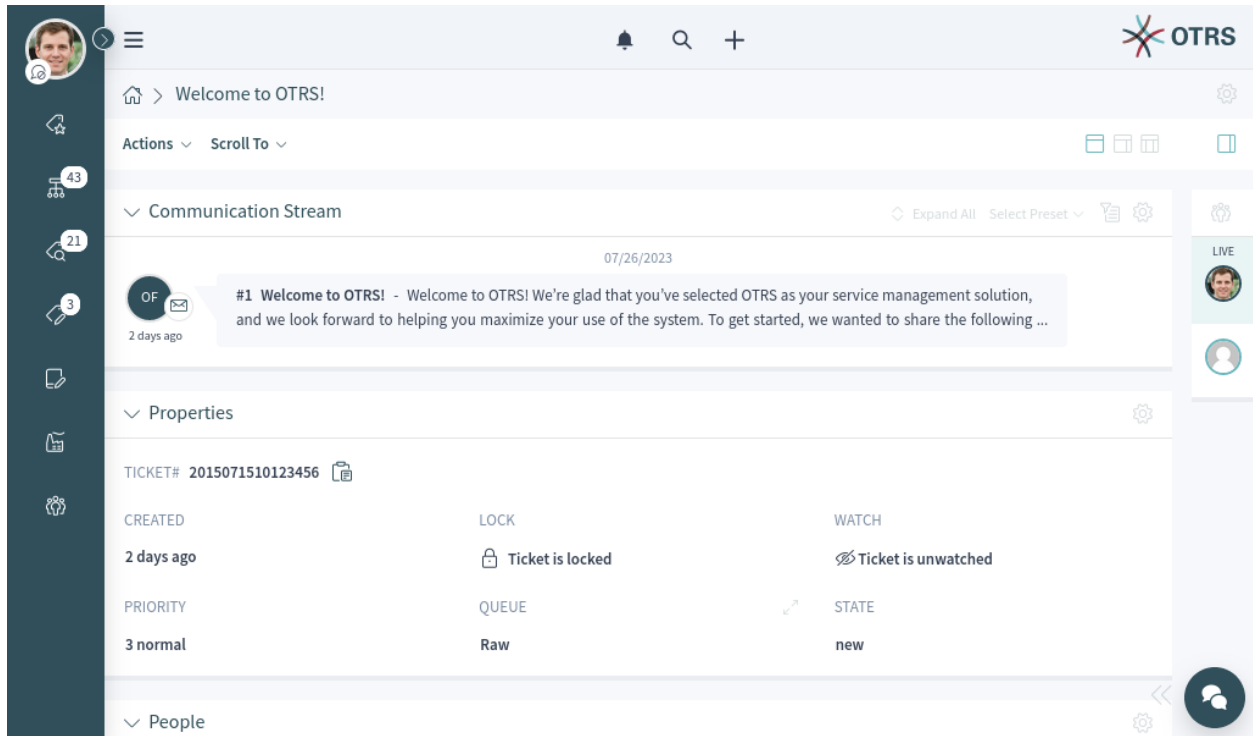


Fig. 24: Business Object Detail View Example

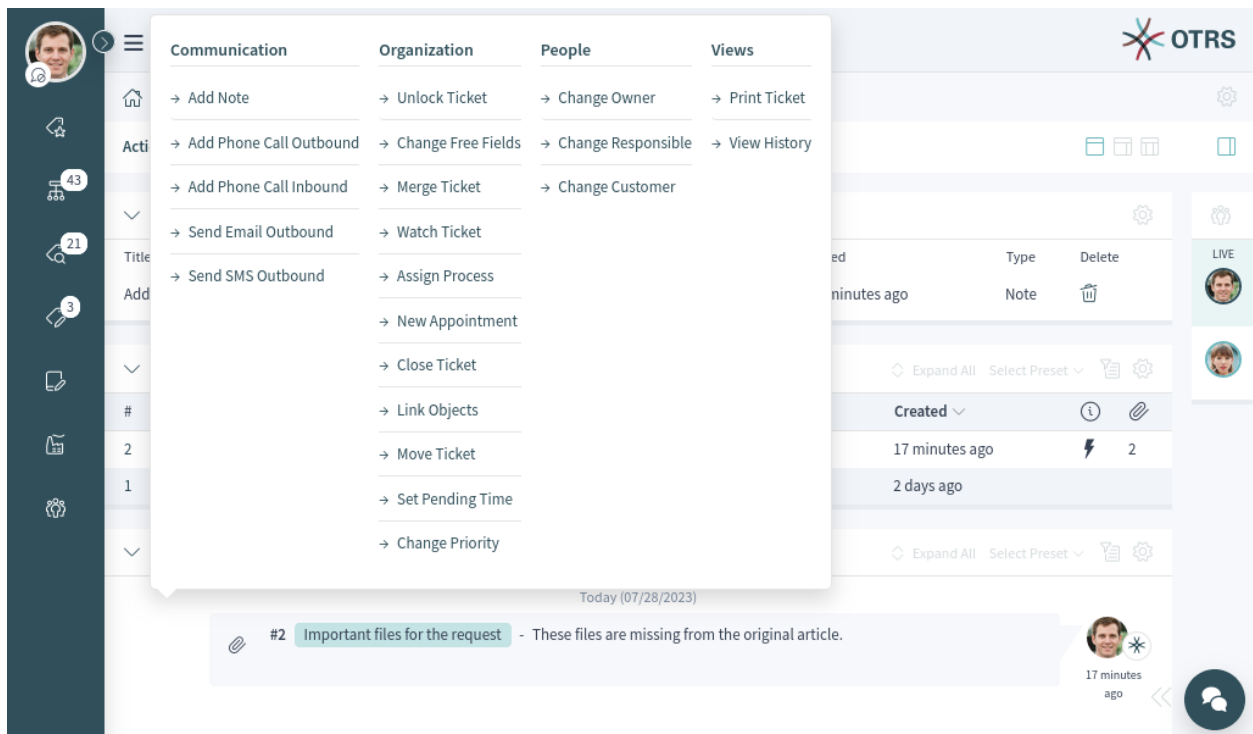


Fig. 25: Business Object Detail View Actions

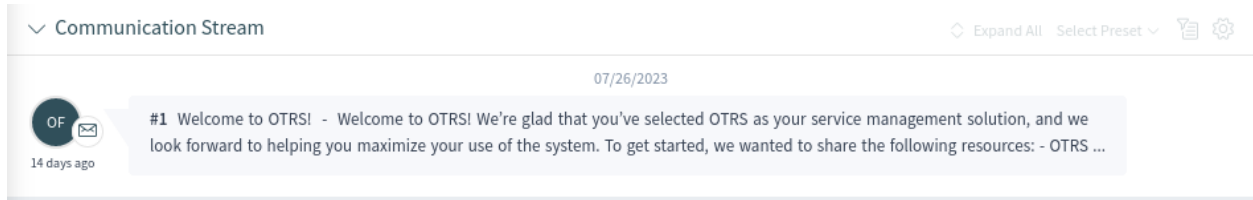


Fig. 26: Widget Overview

The 'Edit Widget Configuration' dialog box has a title bar with a close button. Inside, there's a hint: 'Hint: All fields marked with an asterisk (*) are mandatory.' Below this, the 'Widget Title' field is labeled 'Name your widget'. The '* Article View Type' dropdown is set to 'collapsed'. The '* Hide/Show Columns' section lists several items with checkboxes: Direction, Channel, Sender, Subject, Created, Article Properties, and Attachment, all of which are checked. The '* Sort List' section has a 'Sort by' dropdown set to 'Created (descending)' and a trash icon. The 'Filter List' section has a 'Please select your filter' dropdown set to 'Select Filter' and a '+ Add New Filter' link. The '* Number of Results' dropdown is set to '25'. At the bottom, there are three buttons: 'Reset to Default', 'Cancel', and 'Save'.

Fig. 27: Widget Configuration

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.

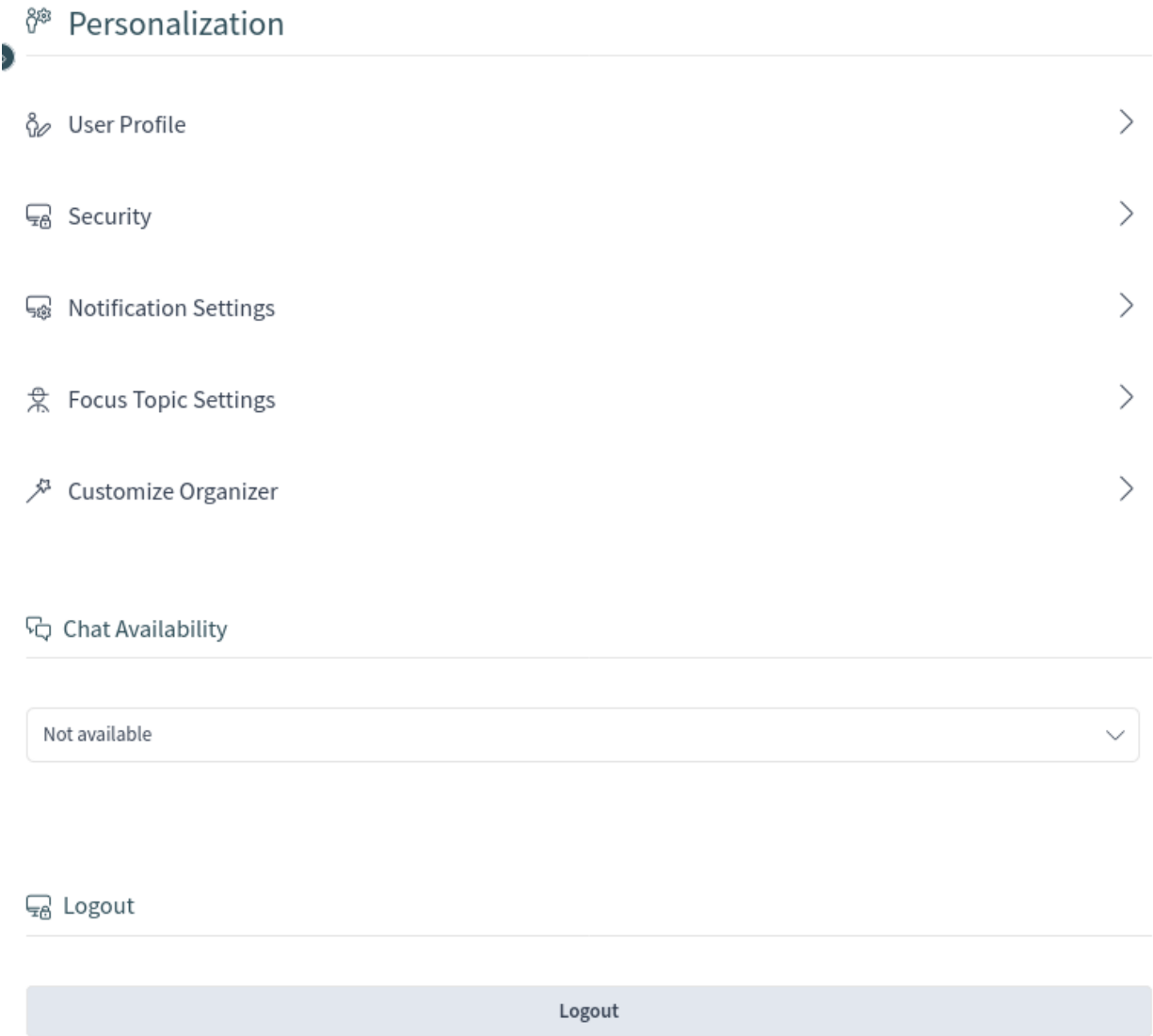


Fig. 28: Personalization

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.






























Ticket Notifications 	all/none				
* Ticket create notification					
Ticket follow-up notification (locked)					
Ticket follow-up notification (unlocked)					
Ticket lock timeout notification					
Ticket queue update notification					
Ticket service update notification					
* 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.





Appointment Notifications 	all/none				
Appointment reminder notification					

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 Focus Topic Settings

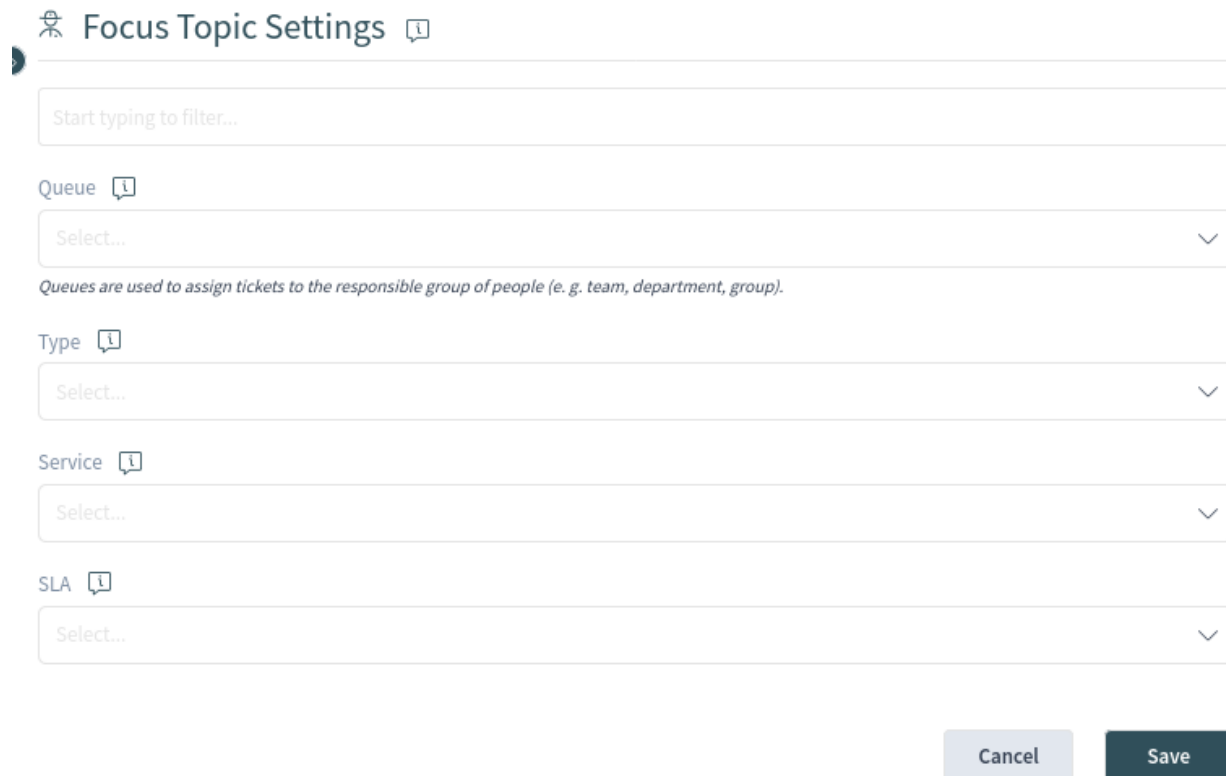
Note: This feature is not enabled by default. It has to be enabled by `AgentPersonalPreference::Groups###0999-FocusTopics` setting of the administrator interface.

This feature supports agents in keeping track of all incidents and requests that relate to a specific focus topic. This is especially helpful when many tickets are handled by different agents at the same time.

With this feature, agents can easily and quickly identify all relevant tickets by defining the ticket properties in their personal settings, that belong to their focus topics. For each selected focus topic, agents can receive notifications, for example, when tickets are created or SLA times are reached. The available options for defining focus topics are not limited to services but include all ticket properties as well as dynamic fields. The ticket properties for the focus topic settings in the agent preferences are enabled/disabled in the system configuration.

This feature allows agents to set various ticket attributes as focus topics. Each agent can focus on multiple ticket attributes and each ticket attribute can be focused on by multiple agents. Some new filter options are available for ticket lists to filter for focus topics.

These settings are for customizing personal notifications. In this screen the agents can set various ticket attributes to focus on those tickets.



Focus Topic Settings ⓘ

Start typing to filter...

Queue ⓘ

Select... ▼

Queues are used to assign tickets to the responsible group of people (e. g. team, department, group).

Type ⓘ

Select... ▼

Service ⓘ

Select... ▼

SLA ⓘ

Select... ▼

Cancel Save

Fig. 31: Focus Topic Settings

Select one or more ticket attributes from the drop-down lists.

Note: *Ticket notifications* have to be also configured by the system administrator in order to receive the notifications.

1.3.5 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.

1.3.6 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

Available for agent-to-agent, agent-to-customer, customer-to-agent, and public-to-agent chats.

1.3.7 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.

The screenshot shows the OTRS Personal Dashboard interface. On the left is a dark sidebar with navigation icons. The top bar includes a user profile, a menu icon, a bell, a search icon, a plus icon, and the OTRS logo. The main content area contains several widgets:

- Dashboard**: A widget with a house icon and a settings gear.
- Scroll To**: A widget with a dropdown arrow and view icons.
- Queue Metric**: A widget with a dropdown arrow and a settings gear. It contains a table with the following data:

Queue	new	open	pending reminder	Total
Junk	13	0	0	13
Postmaster	13	0	0	13
Raw	17	0	0	17
Total	43	0	0	43
- Escalations**: A widget with a dropdown arrow, 'Select Preset' text, and view icons. It shows 'Currently no data available.'
- Reminders**: A widget with a dropdown arrow, 'Select Preset' text, and view icons. It shows 'Currently no data available.'

At the bottom right, there is a chat icon and a back arrow.

Fig. 32: 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.

1.4.1 Announcements Widget


Internal news or information can be added via the administrator interface to appear with the corresponding *Announcements* widget in the agent interface. A click opens the detailed view of the respective news item, containing the title, content, creation date and change date. The widget can be individually activated or deactivated as an optional widget in the agent dashboard. The *Announcements* widget makes it easier to inform employees about events, innovations and offers.

Announcements (2 announcements)		
Title	Announcement	
Documentation	The documentation is finished soon.	
Version 1.0 is released	We are pleased to announce the first public version of the documentation.	

Fig. 33: Announcements Widget

Clicking on an entry in the widget will expand the announcement to see the details.

▼ Announcements (2 announcements)



Title	Announcement
Documentation	The documentation is finished soon.

Title

Documentation

Announcement

The documentation is finished soon.

Version 1.0 is released

We are pleased to announce the first public version of the documentation.

Fig. 34: Announcement Details

1.4.2 Customer Activity Widget

This dashboard widget allows agents to define a set of customers to automatically query. It displays a table showing the related number of open, locked and escalated tickets. Drill down to specific tickets by simply clicking on one of the numbers shown per customer.

Every agent can choose the customers he wants to see. The widget is empty by default, since no customer has been selected yet.

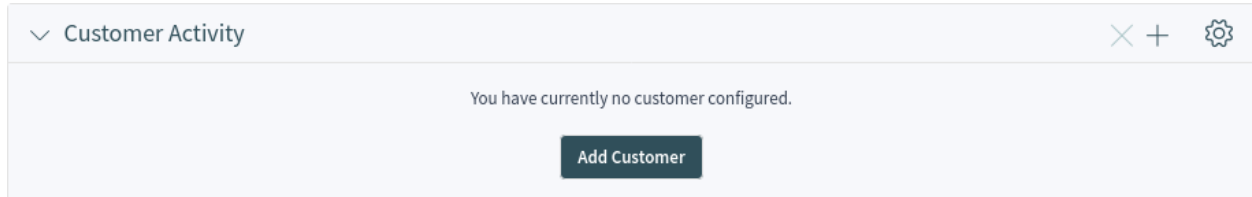


Fig. 35: Customer Activity Widget Without Selected Customer

Clicking on the *Add Customer* button opens an action where you can filter for one or more desired customers and select them via a checkbox. Submitting the form will populate the widget with the customers.

Note: If an agent is already using the widget in OTRS 7, the settings and the content will be fully migrated from the previous version.

Customer Activity						X + ⚙
<input type="checkbox"/> Customer	Open/Unlocked	Open/Locked	Escalated	Total	Remove	
<input type="checkbox"/> Stark Industries	3	9	0	12	X	
<input type="checkbox"/> Super Support Inc.	1	6	0	7	X	
Total	4	15	0	19		

Fig. 36: Customer Activity Widget

For the selected customers the number of open/unlocked, open/locked and escalated tickets will be shown.

The tickets are summed per row and per column. Clicking on the customer itself leads to the customer detail view. Clicking on one of the number in each row leads to a separate ticket list, where exactly these tickets are displayed. If you hover over the numbers in the matrix instead, a popover card with exactly the same list of tickets will be displayed, so you can have a quick look at the tickets behind the numbers. This does not apply to the assigned numbers in the *Total* row at the footer of the widget.

To turn on and off the widget:

1. Open the screen configuration of the *Dashboard*.
2. Add or remove the *Customer Activity* widget. You can rearrange the widgets as well.
3. Click on the *Save* button.

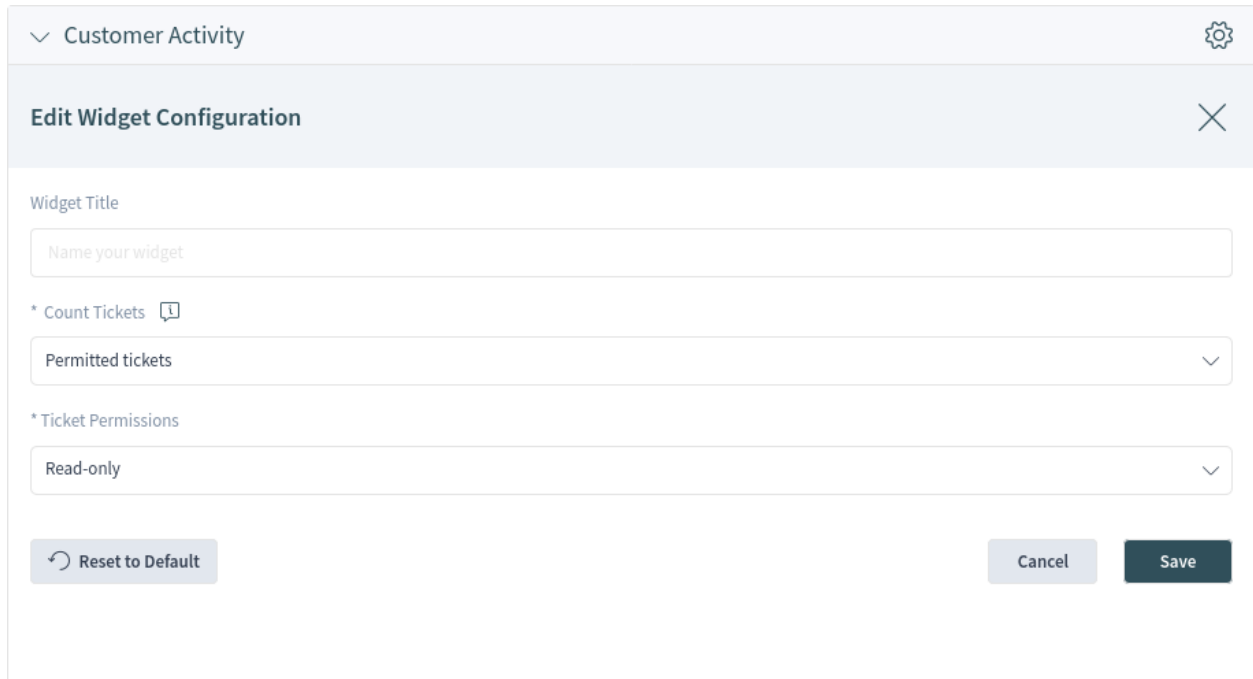
To add customers to the widget:

1. Click on the plus button in the header of the widget.
2. Select the customers that you want to display in the widget.
3. Click on the *Add Selected* button.

To remove a customer from the widget:

1. Click on the × button in the last column.
2. Click on the Yes button in the confirmation dialog.

The behavior of the ticket count feature can be changed in the widget configuration.



The screenshot shows the 'Customer Activity' widget configuration interface. At the top, there's a header bar with a dropdown arrow and the text 'Customer Activity', and a settings gear icon on the right. Below this is a sub-header 'Edit Widget Configuration' with a close 'X' button. The main area contains three configuration sections: 'Widget Title' with a text input field labeled 'Name your widget'; '* Count Tickets' with a dropdown menu currently showing 'Permitted tickets'; and '* Ticket Permissions' with a dropdown menu currently showing 'Read-only'. At the bottom, there are three buttons: 'Reset to Default' (with a circular arrow icon), 'Cancel', and 'Save'.

Fig. 37: Customer Activity Widget Configuration

Count Tickets *

If you select *All tickets*, every ticket will be counted, even those tickets for which the agent does not have the sufficient rights. Selecting the *Permitted tickets* option will count only the tickets for which the agent has proper permissions.

Ticket Permissions *

Controls if *read only* or *read-write* permission is needed to count the tickets.

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. If an article is configured in the process configuration to use *Email* communication channel, an email will be sent to the customer user.

SMS Ticket

SMS ticket is used 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.

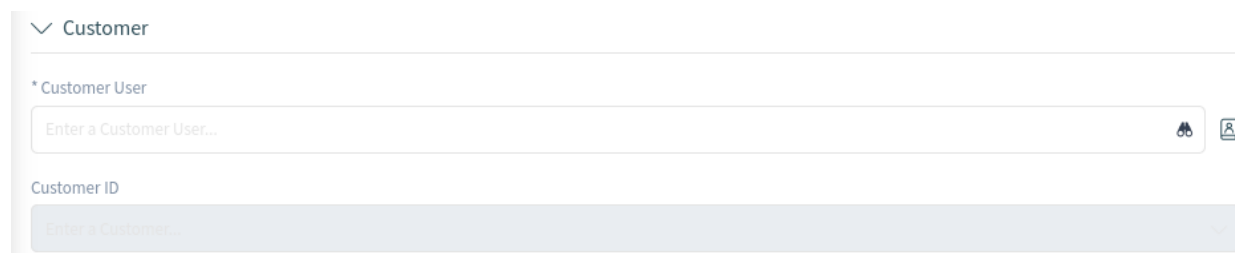
Properties Widget

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

* Customer User

Enter a Customer User...

Customer ID

Enter a Customer...

Fig. 38: Select Customer User

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.

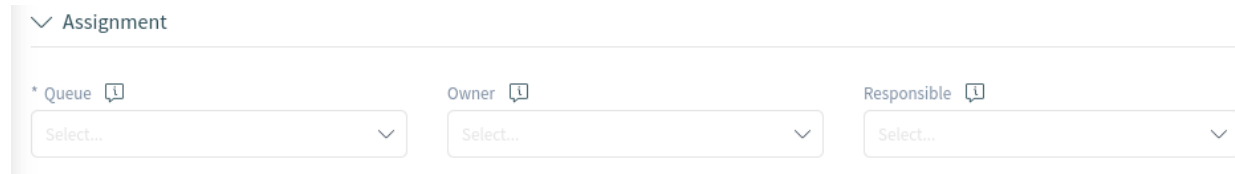


Fig. 39: Queue And Owner Selection

Queue *

The queue into which the new ticket will be placed.

After selecting a service, there is a lookup for configured queues for this service. If there are configured queues for the selected service, only those will be available in the queue selection. If there are no queues configured for the selected service, all queues will be displayed.

It is possible to add a filter button next to the queue selection. After clicking this button all available queues get restored to the queue selection field and can be selected. This feature can be enabled in the system configuration.

Configured ACLs affect the displayed queues as usual.

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 service, SLA, priority and the next ticket state can be selected.

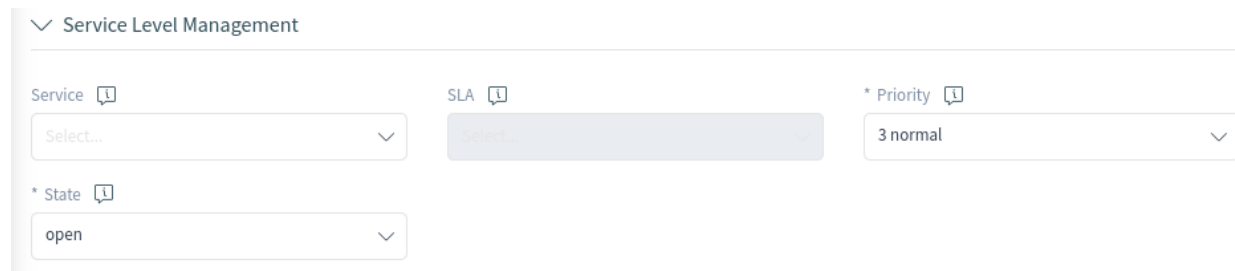


Fig. 40: Priority And State Selection

Service

Select a service for the ticket.

SLA

Select an SLA for the ticket.

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.

Note: *Customer Users Services* filter is applied before the one for *Types Services*.

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

Communication

* From

Start typing...

To

Enter...

Text Template

Select...

Setting a template will overwrite any text or attachment.

* Subject

Enter...

Add Knowledge Base Article

* Body

B I U S | [List Icons] | [Link Icon] [Unlink Icon] [Image Icon] [Table Icon] | [Undo Icon] [Redo Icon] [Search Icon]

Format ▾ | Font ▾ | Size ▾ | A ▾ A ▾ I_x Ω ¶ ¶ Source [Fullscreen Icon]

Enter...

Attachments

Drop files here or click to select files

Time Units (work units)

Enter...

Fig. 41: Write The Message

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.

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.

The screenshot displays the 'Customer Information' widget interface. It is divided into two main columns: 'CUSTOMER USER' and 'CUSTOMER'. The 'CUSTOMER USER' column includes a profile picture of Lacey Green, her name, location (14:47 (Europe / Budapest)), and language (English (United States)). Below this are icons for CHAT, CREATE, ACTION, and SOCIAL. The 'CUSTOMER' column shows 'Super Support Inc.' with its address (5201 Blue Lagoon Drive, 33126 Miami, USA) and similar action icons. Both columns feature a 'CUSTOMER USER STATUS' and 'CUSTOMER STATUS' section with circular progress indicators for 'Open Tickets - 0 | 1 Total Tickets' and 'Closed Tickets - 0 | 1 Total Tickets'. At the bottom, there are sections for 'CUSTOMER USER INFORMATION' (Username: laceygreen, Email: lacey@example.org) and 'CUSTOMER INFORMATION' (Comment: some comment).

Fig. 42: Customer Information Widget

Customer User History Widget

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



Customer User History (1) Select Preset  

Number	Title	Priority	Created
2015071510123456	Welcome to OTRS!	3 normal	2 days ago

Fig. 43: Customer User History Widget

Customer History Widget

This widget shows the tickets for the customer selected above.

Customer History (1) Select Preset  

Number	Title	Priority	Created
2015071510123456	Welcome to OTRS!	3 normal	2 days ago

Fig. 44: 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.

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.

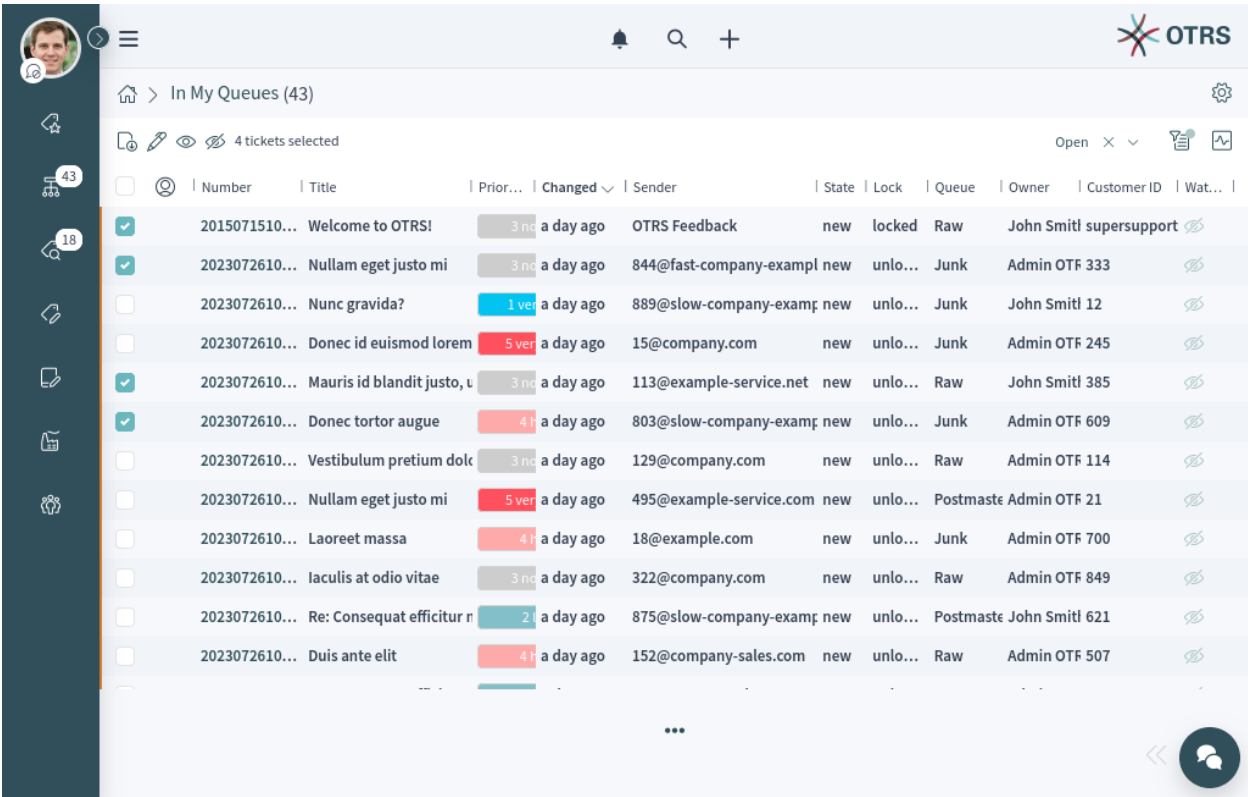


Fig. 45: Ticket List

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. 46: 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.

▼ Change Properties

State ⓘ

Type ⓘ

Queue ⓘ

Owner ⓘ

Responsible ⓘ

Priority ⓘ

Fig. 47: Change Properties

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.

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.

Link Tickets

☒ Do not link
☐ Link together
☐ 

Fig. 48: Link Tickets

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
☐ 

Fig. 49: Merge Tickets

Do not merge

Select this option if the selected tickets should not be merged. This is selected by default.

Merge to oldest

Select this option to merge the selected tickets to the oldest one.

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 merged to the original ticket by the search field.

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 Email

Recipients

803@slow-company-example-service.com

Subject ⓘ

Enter...

Body ⓘ

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

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

Enter...

Time Units (work units)

Enter...

Fig. 50: Write Email

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 Note

Subject ⓘ

Enter...

Body ⓘ

Format | Font | Size | A | A | I_x | Ω | ↶ | ↷ | 🔍

Enter...

☐ Visible to customer

Time Units (work units)

Enter...

Fig. 51: 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		⚙	
Title	Saved	Type	Delete
Add Note - John Smith - 07/28/2023 14:27 (Europe/Budapest)	a minute ago	Note	

Fig. 52: Drafts Widget

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

Expand AllSelect Preset📄⚙

#	↔	Channel	Sender	Subject	Created ▾	🕒	🔗
2	✱		John Smith	Important files for the request	6 minutes ago	⚡	2
1	📄	✉	OTRS Feedback	Welcome to OTRS!	2 days ago		

Fig. 53: Communication Compact Widget

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.

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.

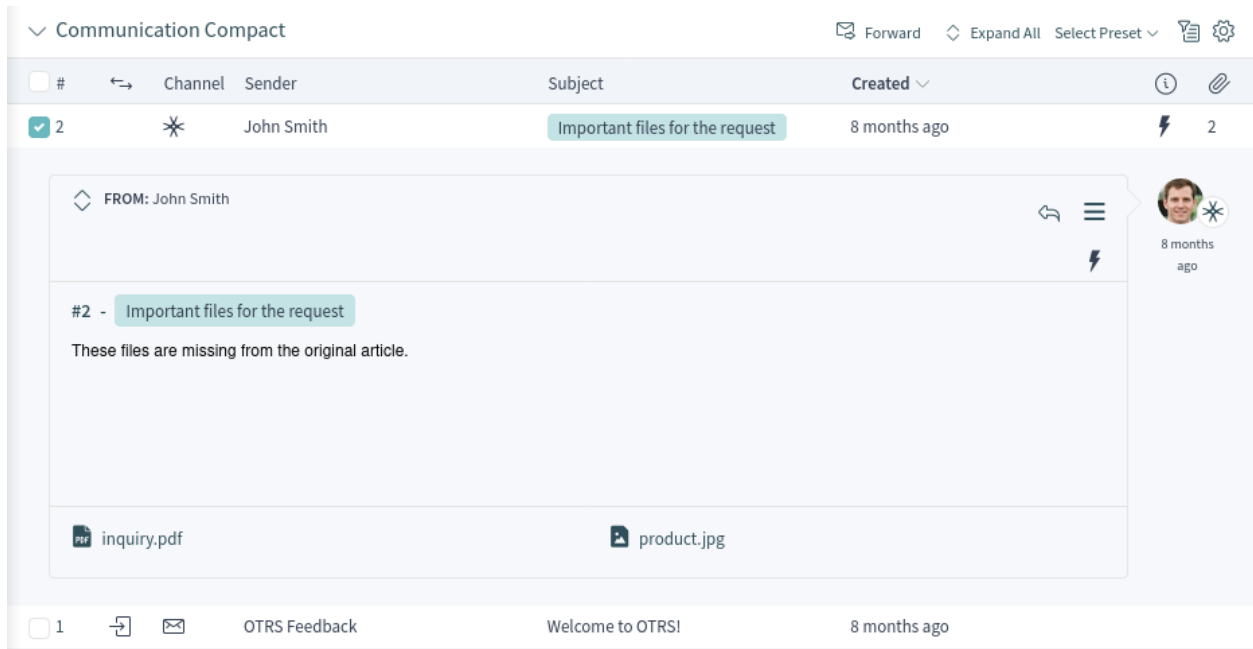


Fig. 54: Expanded Communication Compact Widget

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.

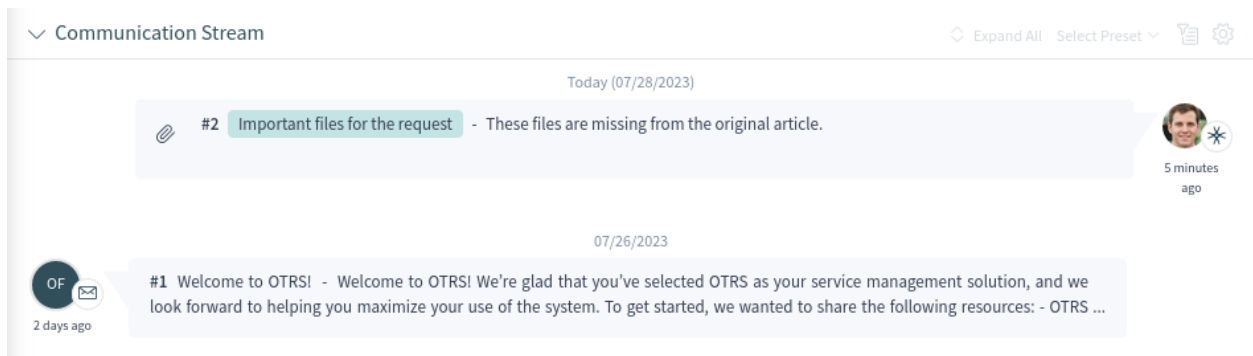


Fig. 55: Communication Stream Widget

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.

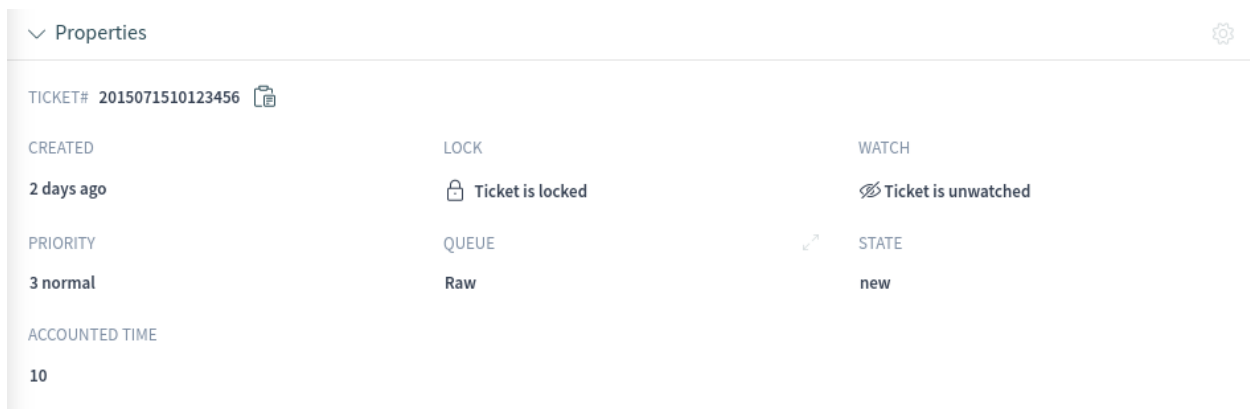


Fig. 56: Properties Widget

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

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.

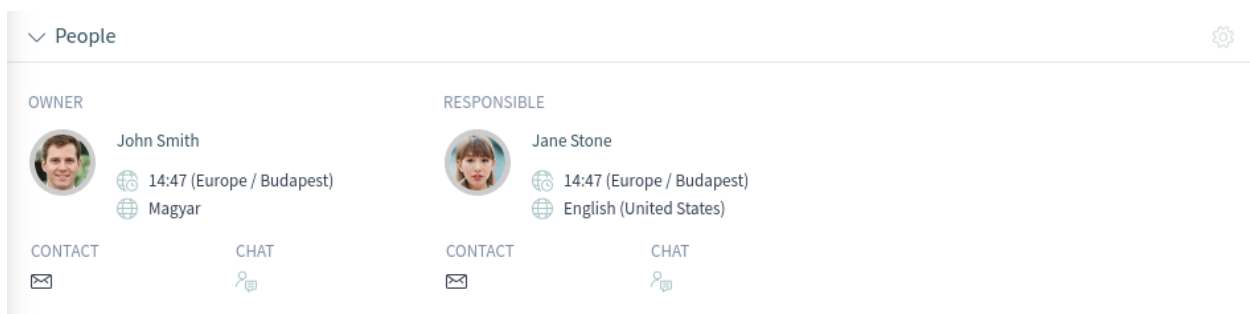


Fig. 57: People Widget

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

Customer Information

CUSTOMER USER

Lacey Green
14:47 (Europe / Budapest)
English (United States)

CUSTOMER

Super Support Inc.
5201 Blue Lagoon Drive
33126 Miami
USA

CUSTOMER USER STATUS

Open Tickets - 0 | 1 Total Tickets
Closed Tickets - 0 | 1 Total Tickets

CUSTOMER STATUS

Open Tickets - 0 | 1 Total Tickets
Closed Tickets - 0 | 1 Total Tickets

CUSTOMER USER INFORMATION

Username: laceygreen
Email: lacey@example.org

CUSTOMER INFORMATION

Comment: some comment

Fig. 58: Customer Information Widget

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.

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.

Linked Tickets (1)

Number	Title	Priority	Created	State	Queue	Linked As	Unlink
2023072610000403	Donec tortor augue	4 high	2 days ago	new	Junk	Normal	X

Fig. 59: Linked Tickets Widget

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.

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.

Attachments Widget

Linked Knowledge Base Articles (1)							✕	+	Select Preset	📄	⚙️
<input type="checkbox"/>	FAQ#	Title	State	Created	Linked As	Unlink					
<input type="checkbox"/>	10001	Vestibulum euismod luctus tincidunt	internal (agent)	2 days ago	Normal	✕					

Fig. 60: Linked Knowledge Base Articles Widget

Linked Appointments (1)							✕	+	Select Preset	📄	⚙️
<input type="checkbox"/>	Title	Location	Start Time	End Time	Created	Linked As	Unlink				
<input type="checkbox"/>	Daily Meeting		07/26/2023 10:00	07/26/2023 11:00	2 days ago	Normal	✕				

Fig. 61: Linked Appointments 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.

Attachments								📄	Select Preset	📄	⚙️
<input type="checkbox"/>	Type	Filename	File size	Create time	Dir...	Article	Preview	Download			
<input type="checkbox"/>	📄	inquiry.pdf	8.84 KB	5 minutes ago		#2 - Important files for the request		📄			
<input type="checkbox"/>	🖼️	product.jpg	291.31 KB	5 minutes ago		#2 - Important files for the request	🖼️	📄			

Fig. 62: Attachments Widget

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.

Communication	Organization	People	Views
→ Add Note	→ Unlock Ticket	→ Change Owner	→ Print Ticket
→ Add Phone Call Outbound	→ Change Free Fields	→ Change Responsible	→ View History
→ Add Phone Call Inbound	→ Merge Ticket	→ Change Customer	
→ Send Email Outbound	→ Watch Ticket		
→ Send SMS Outbound	→ Assign Process		
	→ New Appointment		
	→ Close Ticket		
	→ Link Objects		
	→ Move Ticket		
	→ Set Pending Time		
	→ Change Priority		

Fig. 63: Ticket Detail View Actions

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.

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 used to assign tickets to the responsible group of people. 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. If the customer user sends another message before the reminder time runs out, the agent can answer and select the *pending* status again without having to re-enter the reminder time, title and text, as this information is added automatically. If the reminder time expires, the default values are used.

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.

Watchlists

Note: The feature should be turned on with `Ticket::Watchlist` setting first. In order to restrict this feature to specific groups, verify the `Ticket::WatchlistGroup` setting in the system configuration. By default, all users will have access to this feature.

It is possible to customize the watch list notifications in the *Ticket Notifications* screen.

Use this menu item to add tickets to a watchlist or to remove tickets from a watchlist. The menu item *Watchlists* is available in the breadcrumb bar.

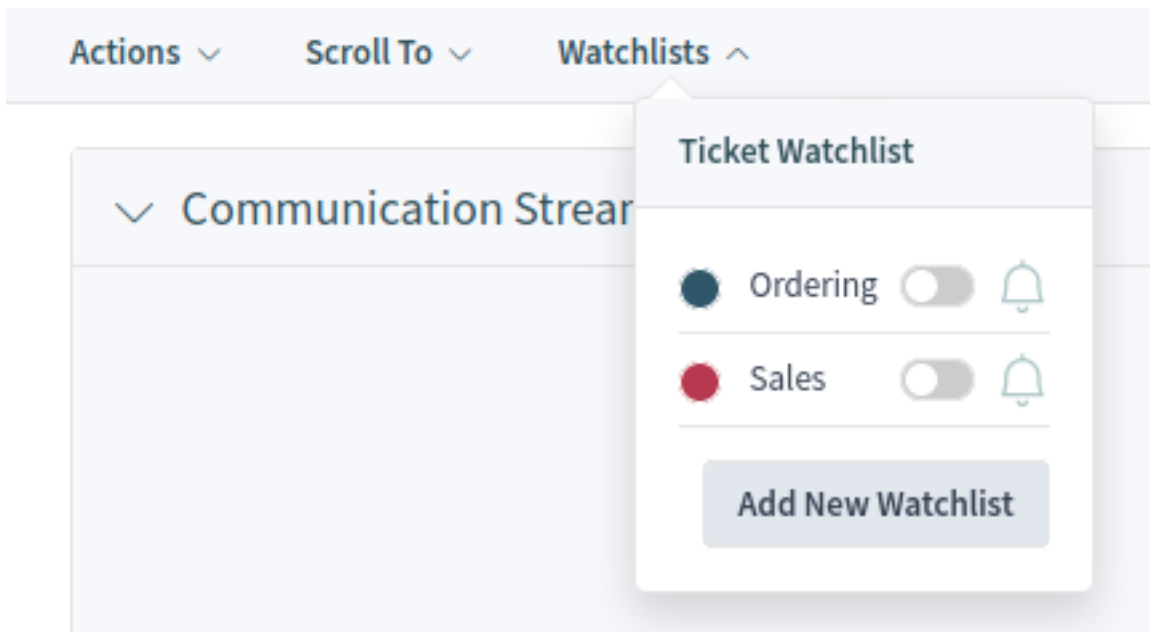


Fig. 64: Watchlists Menu

The ticket can be assigned to a watchlist via this menu item by using the toggle button. Additionally, the ticket can be removed from a watchlist. The *Add New Watchlist* button opens the [Ticket Watchlist Overview](#) screen and the *Create Ticket Watchlist* action.

If the ticket is added to the watchlist, the menu item will be changed to the color defined for the watchlist. If the ticket is added to multiple watchlists, all colors will be displayed.

Use the bell icon to set a reminder for the ticket in the watchlist. For this, the agent has to be subscribed to the ticket or it has to be assigned to one of his watchlists.

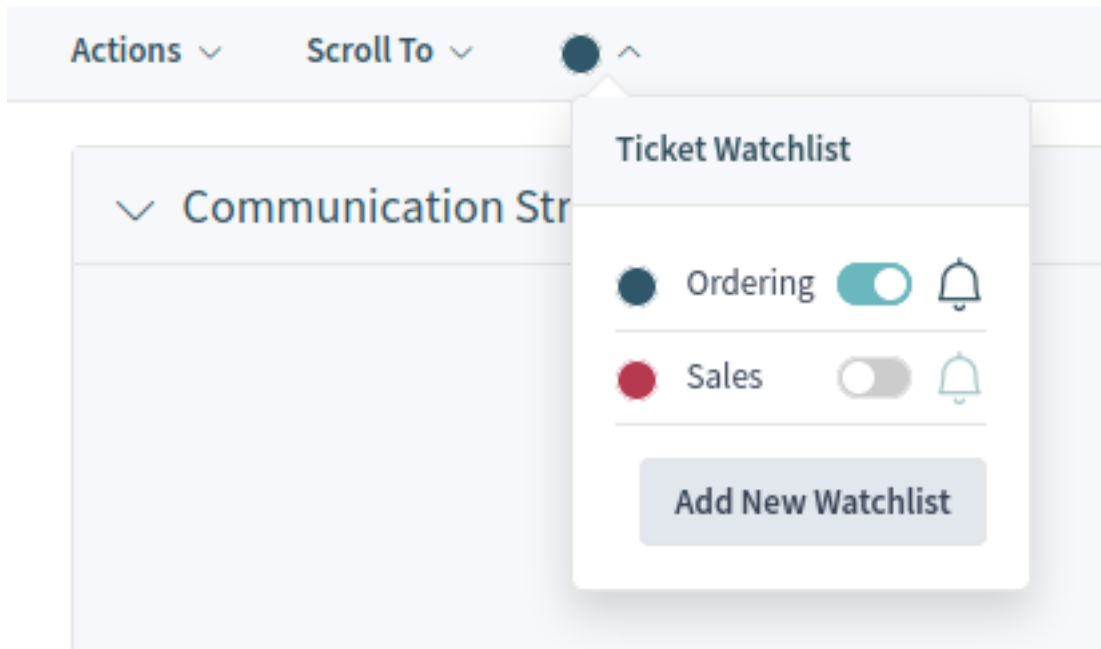


Fig. 65: Added Ticket to Watchlist

Note: This option is visible only, if the ticket is already added to a watchlist.

The *Watchlist Reminder* action has the following fields by default:

Reminder active

Controls, whether the reminder is active or not. New reminders will be added only if this checkbox is checked. For existing reminders, unchecking the checkbox will remove the reminder.

Reminder Time *

Set the date and time when the reminder should be displayed.

Reminder for *

Select a watchlist from the drop-down list.

Note

Add additional information to the reminder text.

Note: There can only be one active reminder per agent and ticket. Notifications are only being sent every ten minutes.

If a reminder is defined for the ticket in a watchlist, the bell icon will be filled.

A watchlist belongs to the agent who created it. The list can be moved to another agent in the [Ticket Watchlist Overview](#) screen. When moving a watchlist to another agent, reminders will also be moved.

In this case, where the owner of the watchlist is changed, the notification that is sent is different that the others. It can only be sent by the email notification method and it should not contain any ticket related OTRS smart tag (if so they will be removed before sending) as there is no ticket involved in the process that triggers the event.

The default *Watchlist move notification* is attached to the event `WatchlistMoveNotification`. This and

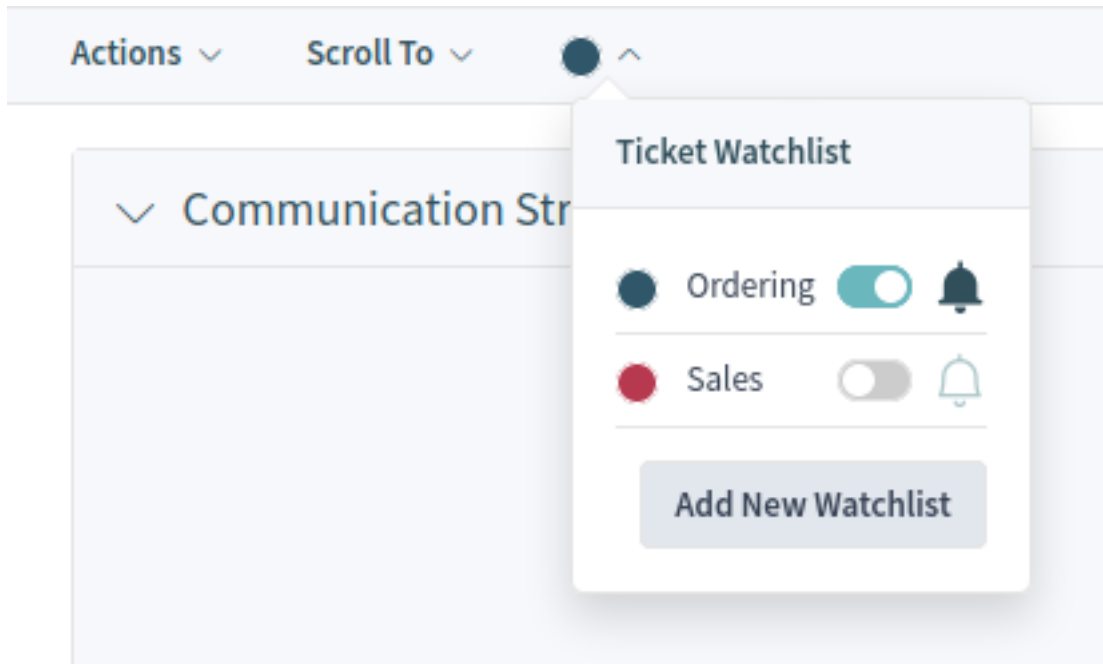


Fig. 66: Active Watchlist Reminder

any other ticket notification attached to the same event should prevent the use of these ticket related OTRS smart tags.

Reminders will only be sent if the assigned agent at this time still has access to the watchlist containing the ticket and/or still is subscribed to the ticket.

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.

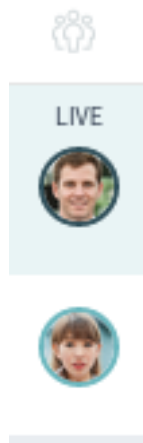


Fig. 67: Sidebar

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.

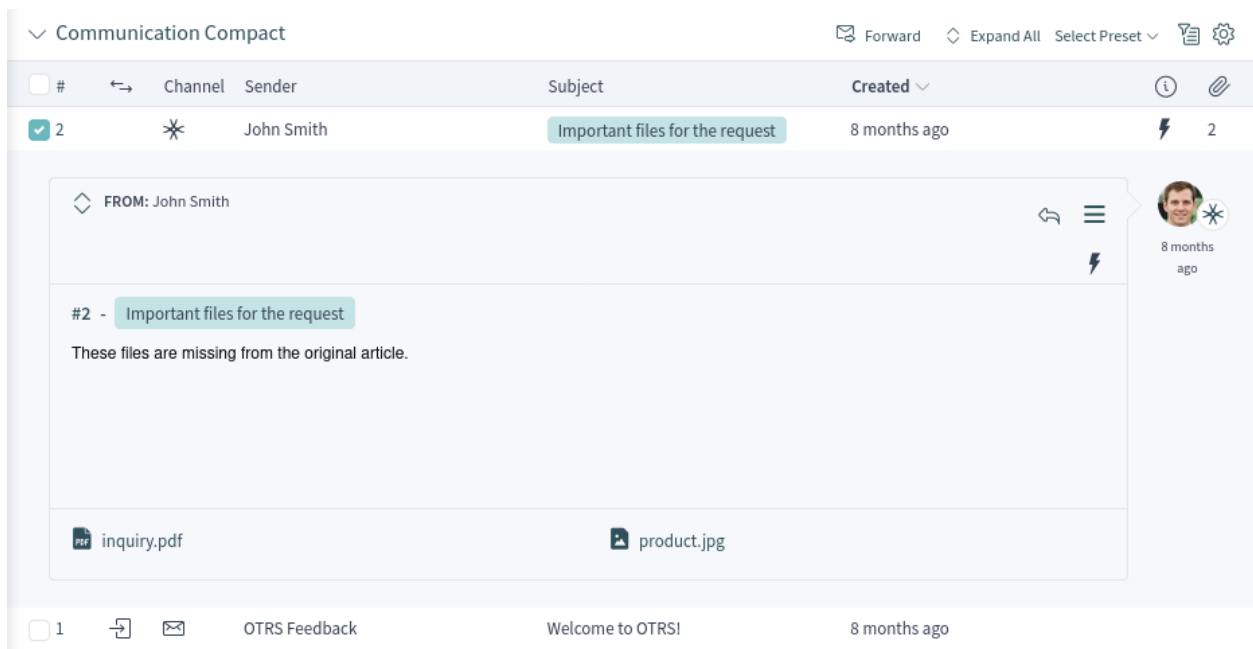
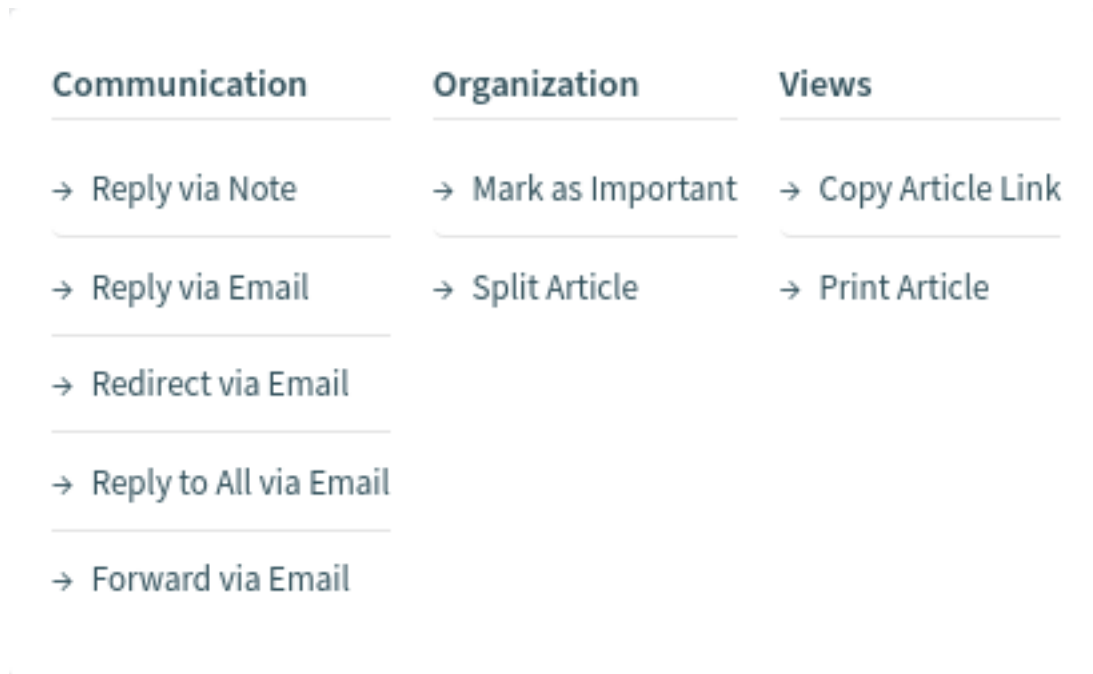


Fig. 68: Expanded Communication Compact Widget

Ticket articles can be sent as email attachments. The agents can select multiple articles from one ticket and forward them at the same time instead of forwarding only a single article. A checkbox is displayed next to each article in the *Communication Stream* and in the *Communication Compact* widgets and a *Forward* menu item is displayed in the header of the widget. Clicking on this menu item opens the *Forward via Email* action and attaches all selected articles as attachments.

1.6.1 Article Detail View Actions

The following actions are available in the article detail view.



Communication	Organization	Views
→ Reply via Note	→ Mark as Important	→ Copy Article Link
→ Reply via Email	→ Split Article	→ Print Article
→ Redirect via Email		
→ Reply to All via Email		
→ Forward via Email		

Fig. 69: Article Detail View Actions

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

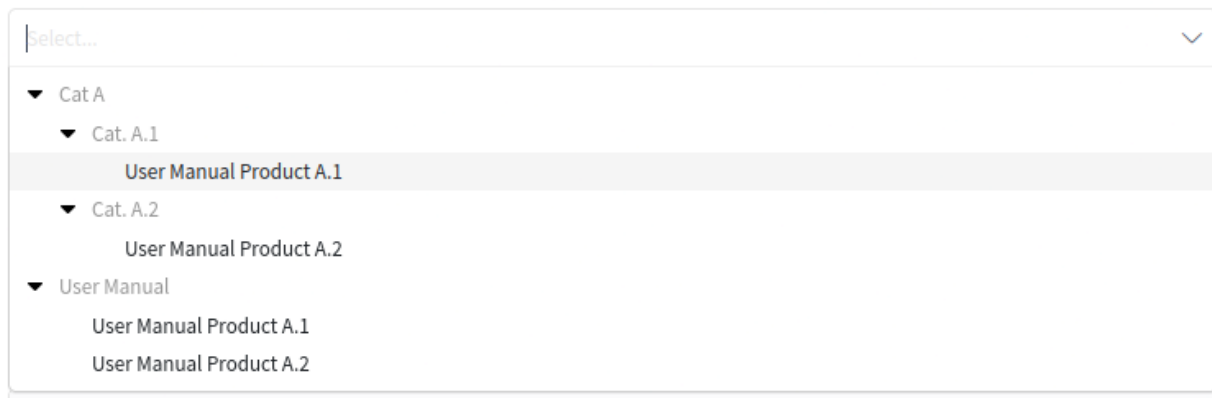
This action allows you to view the raw source of the email article.

Templates

Templates with category folder structure can be defined to create article more quickly. This folder structure will be shown in any forms that produce an article. The folder structure is a drop-down field named *Text Template*, where the template can be selected in a category tree.

Note: The type of the template and the queue of the ticket determine whether a template is displayed in a specific category folder structure. The category determines in which category structure the template is shown.

Text Template



The screenshot shows a dropdown menu titled "Text Template". The menu is open, displaying a list of categories and their associated templates. The categories are "Cat A", "Cat. A.1", "Cat. A.2", and "User Manual". The templates are "User Manual Product A.1", "User Manual Product A.2", "User Manual Product A.1", and "User Manual Product A.2". The "User Manual Product A.1" template is highlighted.

Fig. 70: Text Template Field

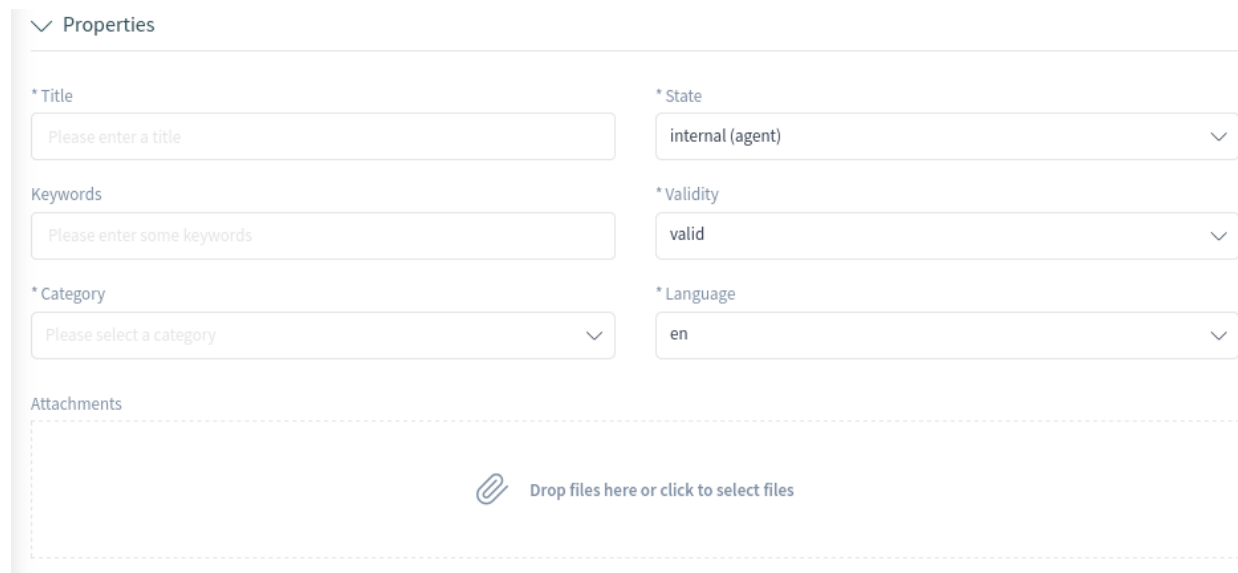
1.7 Knowledge Base Articles

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.



The screenshot shows the "Create Knowledge Base Article" form. It has a "Properties" section with the following fields:

- * Title: A text input field with the placeholder "Please enter a title".
- * State: A dropdown menu with the selected value "internal (agent)".
- Keywords: A text input field with the placeholder "Please enter some keywords".
- * Validity: A dropdown menu with the selected value "valid".
- * Category: A dropdown menu with the placeholder "Please select a category".
- * Language: A dropdown menu with the selected value "en".

Below the properties section is an "Attachments" section with a dashed border and a paperclip icon. The text "Drop files here or click to select files" is displayed inside the dashed box.

Fig. 71: 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.

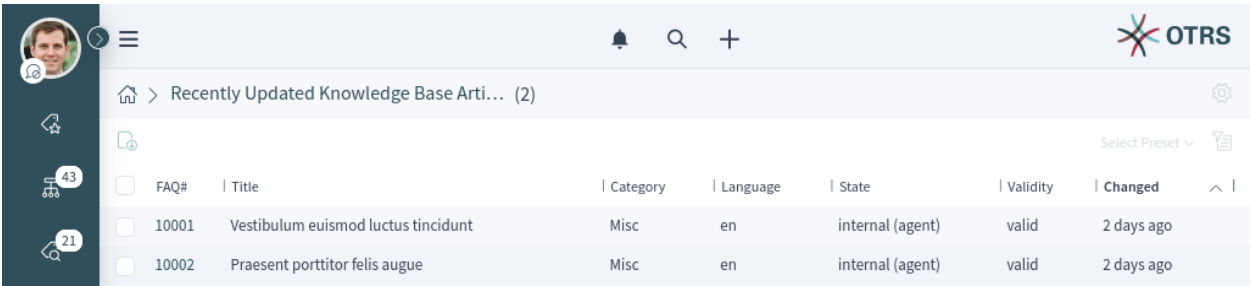
Comment (internal)

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.

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



FAQ#	Title	Category	Language	State	Validity	Changed
10001	Vestibulum euismod luctus tincidunt	Misc	en	internal (agent)	valid	2 days ago
10002	Praesent porttitor felis augue	Misc	en	internal (agent)	valid	2 days ago

Fig. 72: Knowledge Base Article List

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.

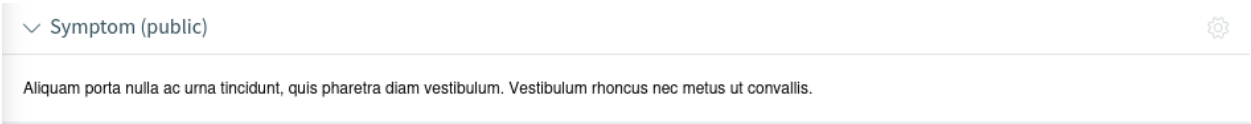


Fig. 73: Symptom Widget

Problem Widget

This widget can be used to describe the problem itself.

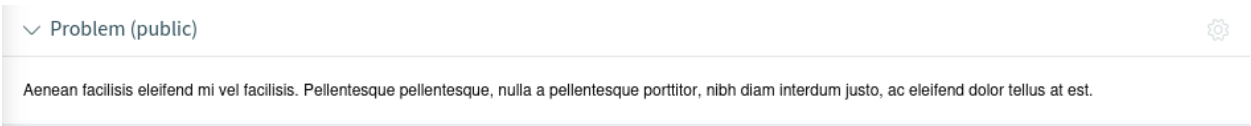


Fig. 74: Problem Widget

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.

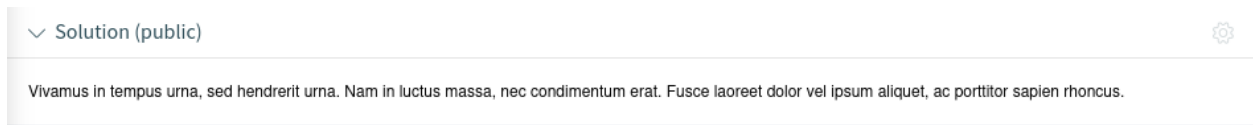


Fig. 75: Solution Widget

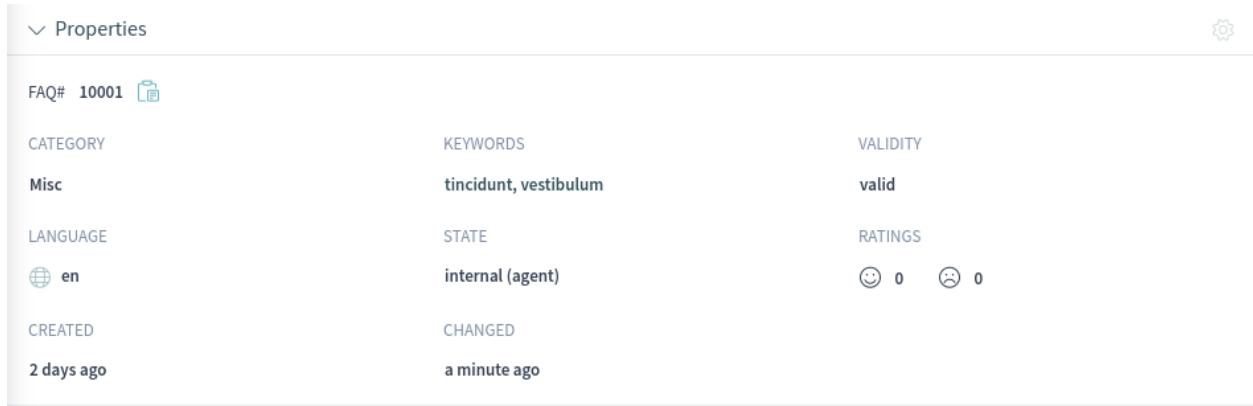


Fig. 76: Properties Widget

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.

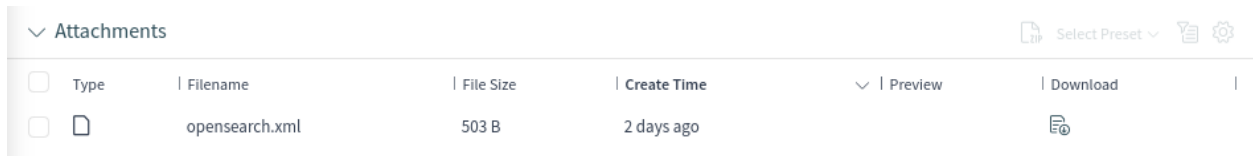


Fig. 77: Attachments Widget

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

Rating

Was this article helpful for you?

Yes

No

Fig. 78: Rating Widget

Linked Tickets (1)

+

Open

<input type="checkbox"/>	Number	Title	Priority	Created	State	Queue	Linked As	Unlink
<input type="checkbox"/>	2023072610000403	Donec tortor augue	4 High	2 days ago	new	Junk	Normal	X

Fig. 79: Linked Tickets Widget

Linked Knowledge Base Articles (1)

+

Select Preset

<input type="checkbox"/>	FAQ#	Title	State	Created	Linked As	Unlink
<input type="checkbox"/>	10001	Vestibulum euismod luctus tincidunt	internal (agent)	2 days ago	Normal	X

Fig. 80: Linked Knowledge Base Articles Widget

Linked Appointments (1)

+

Select Preset

<input type="checkbox"/>	Title	Location	Start Time	End Time	Created	Linked As	Unlink
<input type="checkbox"/>	Daily Meeting		07/26/2023 10:00	07/26/2023 11:00	2 days ago	Normal	X

Fig. 81: Linked Appointments Widget

interface.

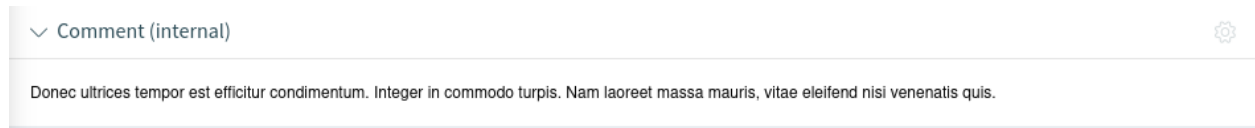


Fig. 82: Comment Widget

People Widget

This widget can be used to display user cards of the people who created and last changed the knowledge base article.

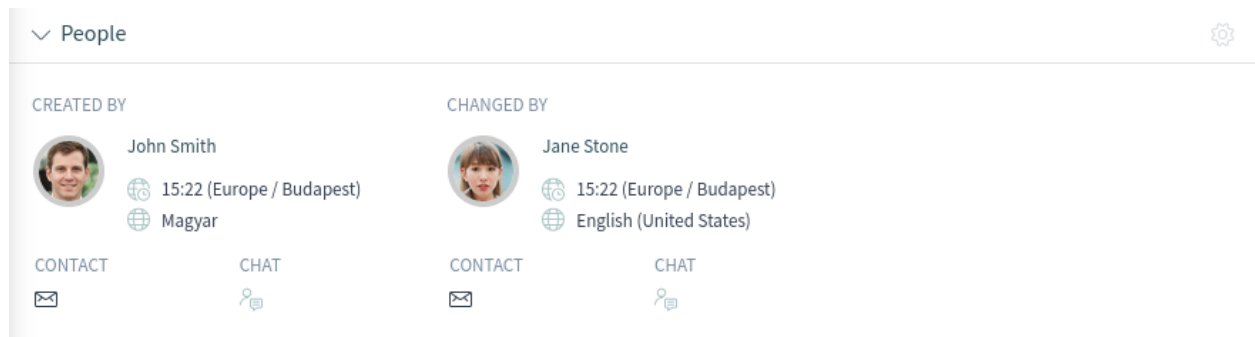


Fig. 83: People Widget

Knowledge Base Article Detail View Actions

The following actions are available in the knowledge base article detail view.



Fig. 84: Knowledge Base Article Detail View Actions

Organization

This column groups the following actions together:

Edit Knowledge Base Article

This action allows you to edit the knowledge base article. The edit screen is very similar to the create knowledge base article screen, but the fields are already filled with values.

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

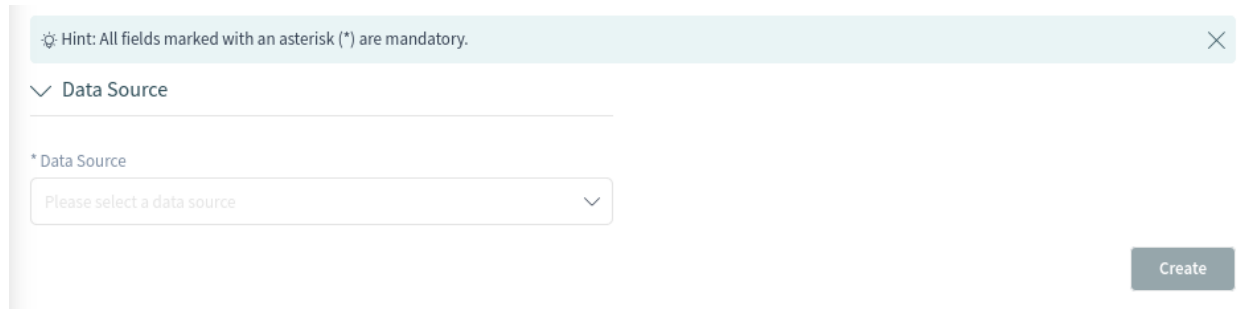
Customers in **OTRS** are organizations, companies or authorities. The real users are called *Customer Users*. A fresh OTRS installation contains no customers by default.

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.



The screenshot shows a web form for creating a customer. At the top, there is a light blue hint box that says: "Hint: All fields marked with an asterisk (*) are mandatory." Below this, the form has a section titled "Data Source" with a dropdown arrow. Underneath, there is a label "* Data Source" followed by a text input field containing the placeholder text "Please select a data source" and a small downward arrow. At the bottom right of the form, there is a grey button labeled "Create".



Fig. 85: 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.

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

▼ Data Source

* Data Source

Database Backend

▼

▼ Customer Information

* Customer

Enter...

* CustomerID

Enter...

* Valid

valid

▼

▼ Address

Street

Enter...

Zip

Enter...

City

Enter...

Country

Select...

▼

▼ Miscellaneous

URL

Enter...

Comment

Enter...

Create

Fig. 86: 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

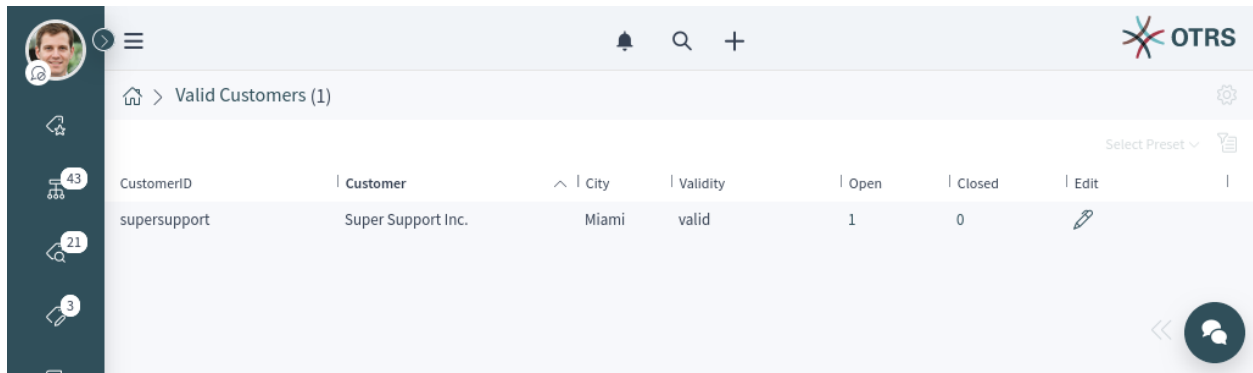
Add additional information to this customer. It is recommended that you always fill this field with full sentences for better clarity.

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.



CustomerID	Customer	City	Validity	Open	Closed	Edit
supersupport	Super Support Inc.	Miami	valid	1	0	

Fig. 87: Customer List

1.8.3 Customer Detail View

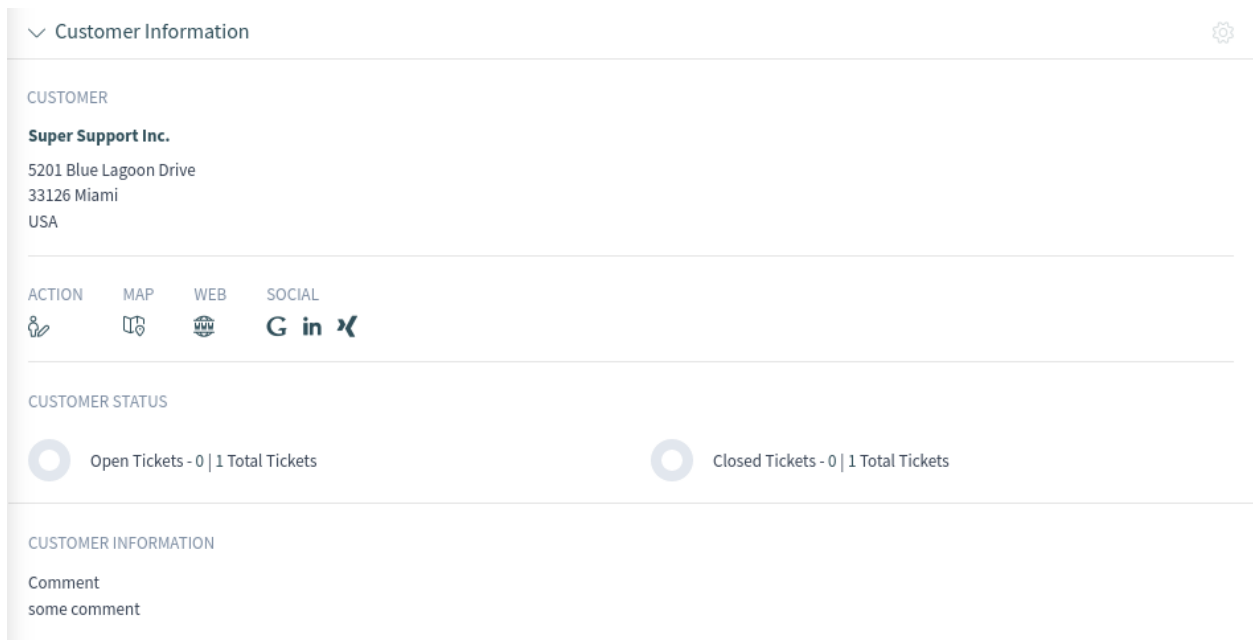
Use this screen to see the details of a customer. The customer detail view is available when you select a customer from a customer list.

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.



Customer Information

CUSTOMER

Super Support Inc.

5201 Blue Lagoon Drive
33126 Miami
USA

ACTION MAP WEB SOCIAL

CUSTOMER STATUS

Open Tickets - 0 | 1 Total Tickets

Closed Tickets - 0 | 1 Total Tickets

CUSTOMER INFORMATION

Comment
some comment

Fig. 88: Customer Information Widget

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.

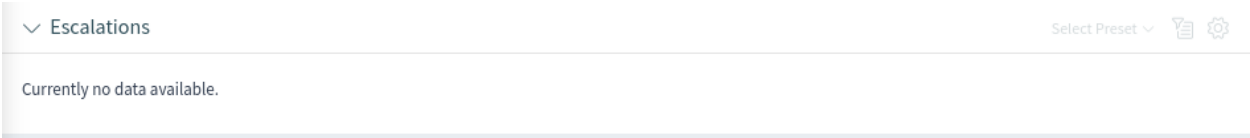


Fig. 89: Escalations Widget

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.

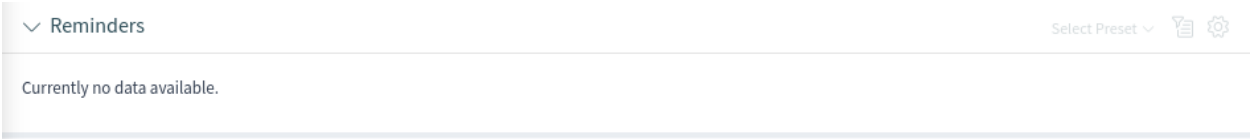


Fig. 90: Reminders Widget

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.

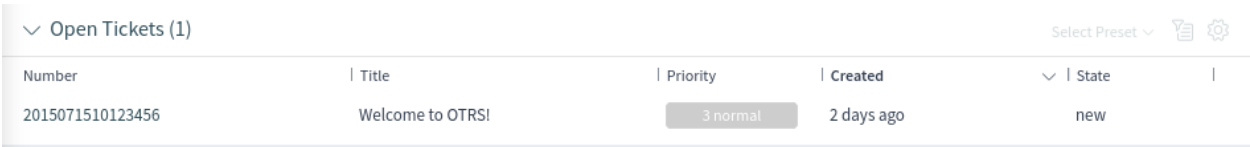


Fig. 91: Open Tickets Widget

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 Users (2)												Select Preset		
Username	Firstname	Lastname	Email	CustomerID	Validity	Open	Closed	Chat	Create	Edit				
laceygreen	Lacey	Green	lacey@example.org	supersupport	valid	1	0							
robertmeyer	Robert	Meyer	robert@example.org	supersupport	valid	0	0							

Fig. 92: Customer Users Widget

Ticket List (1)												Select Preset		
Title	Priority	Created	State	Sender	Lock	Queue	Owner	Customer ID	Watch					
Welcome to OTRS!	3 normal	2 days ago	new	OTRS Feedback	locked	Raw	John Smith	supersupport						

Fig. 93: Ticket List Widget

Customer Detail View Actions

The following actions are available in the customer detail view.

Organization	People
→ Edit Customer	→ Add Customer User

Fig. 94: Customer Detail View Actions

Organization

This column groups the following actions together:

Edit Customer

This action allows the agent to edit the customer.

People

This column groups the following actions together:

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.

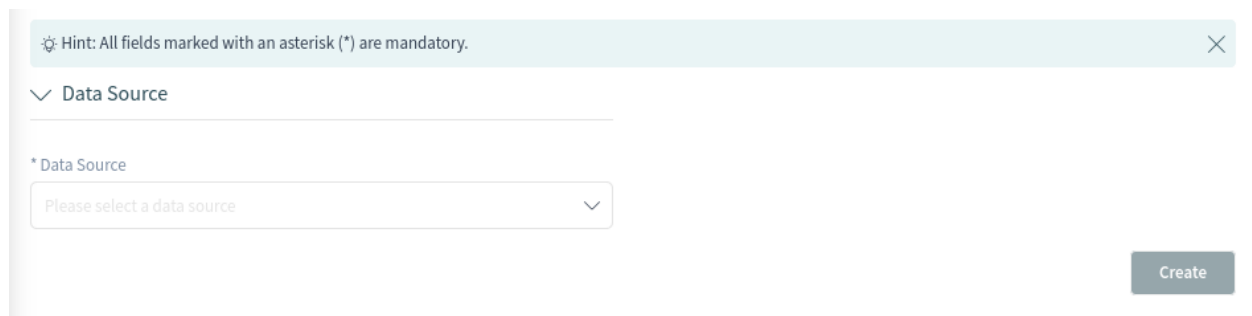


Fig. 95: Select Data Source

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 *

In this section, the data source for storing customer users can be selected. Multiple data sources are supported, including external data sources like LDAP.

Note: External data sources can be read-only.

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.

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

▼ Data Source

* Data Source

Database Backend

▼ Personal Information

Title or salutation

Enter...

* Firstname

Enter...

* Lastname

Enter...

* Email

Enter...

* CustomerID

Start typing...

Phone

Enter...

Fax

Enter...

Mobile

Enter...

▼ Address

Street

Enter...

Zip

Enter...

City

Enter...

Country

Enter...

▼ Login Credentials

* Username

Enter...

Password

The password must contain at least:

✗ 12 characters

* Valid

valid

▼ Security

* Login Forbidden

No

▼ Miscellaneous

Comment

Enter...

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

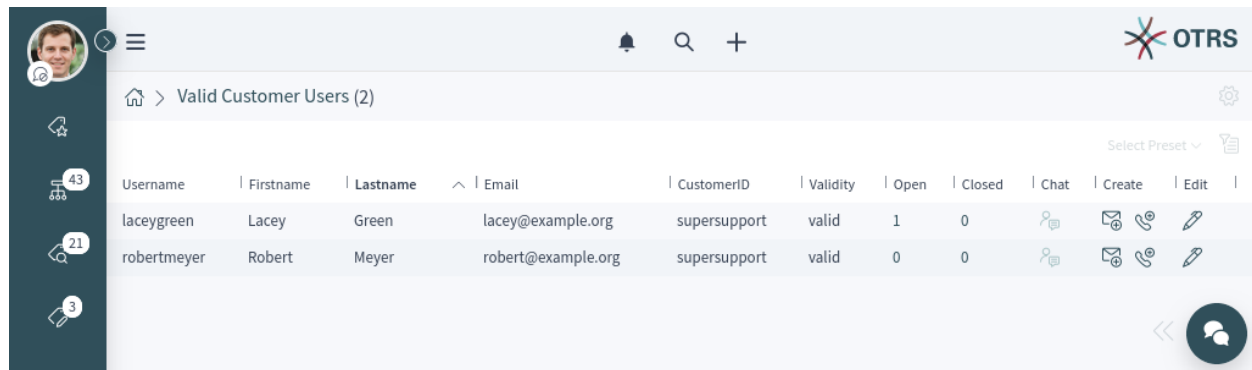
In this section, additional information about the customer user can be added.

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.



Username	Firstname	Lastname	Email	CustomerID	Validity	Open	Closed	Chat	Create	Edit
laceygreen	Lacey	Green	lacey@example.org	supersupport	valid	1	0			
robertmeyer	Robert	Meyer	robert@example.org	supersupport	valid	0	0			

Fig. 97: 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.

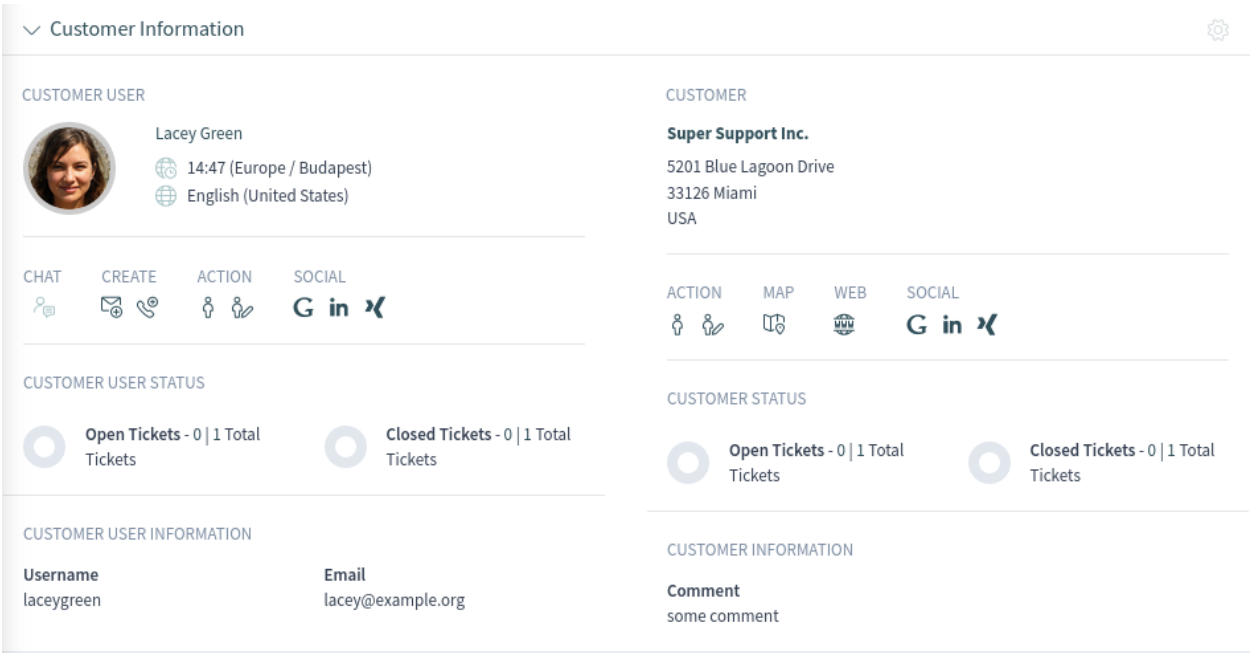


Fig. 98: Customer Information Widget

Clicking on a ticket opens the ticket detail view.

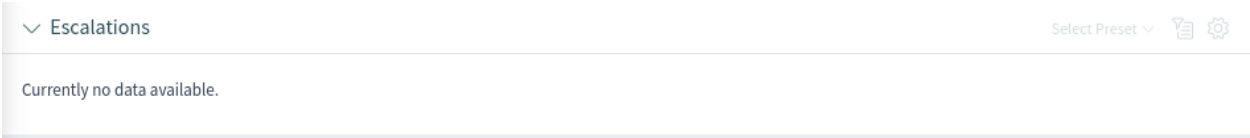


Fig. 99: Escalations Widget

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.

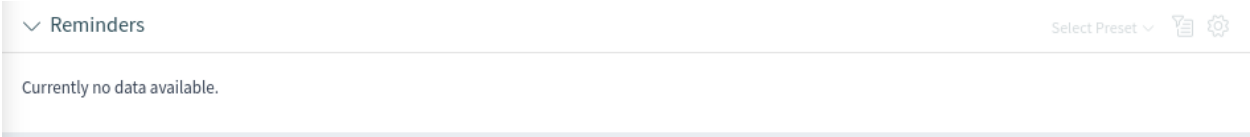


Fig. 100: Reminders Widget

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.

Open Tickets (1)						Select Preset		
Number	Title	Priority	Created	State				
2015071510123456	Welcome to OTRS!	3 normal	2 days ago	new				

Fig. 101: Open Tickets Widget

Ticket List (1)										Select Preset		
Title	Priority	Created	State	Sender	Lock	Queue	Owner	Customer ID	Watch			
Welcome to OTRS!	3 normal	2 days ago	new	OTRS Feedback	locked	Raw	John Smith	supersupport				

Fig. 102: Ticket List Widget

Customer User Detail View Actions

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

Communication	Organization
→ Create Phone Ticket	→ Edit Customer User
→ Create Email Ticket	
→ Create SMS Ticket	

Fig. 103: Customer User Detail View Actions

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.

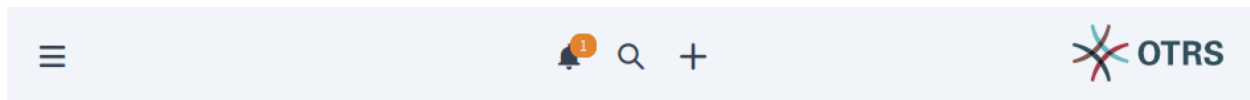


Fig. 104: New Notification Received

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



Fig. 105: Notification Popup

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.






























Ticket Notifications 	all/none				
* Ticket create notification					
Ticket follow-up notification (locked)					
Ticket follow-up notification (unlocked)					
Ticket lock timeout notification					
Ticket queue update notification					
Ticket service update notification					
* To activate this notification, at least one transport method must be activated.					

Fig. 106: Ticket Notifications Widget

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.





Notifications (1) 					
  Select Preset  					
<input type="checkbox"/> Name	Age	Subject	Object Type	Related To	
<input type="checkbox"/> Ticket create notification	5 minutes ago	Ticket Created: Etiam viverra dignissim ligula	Ticket	2023080710000018	

Fig. 107: Notification List

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.

Notification

Subject: Ticket Created: Etiam viverra dignissim ligula

When: 08/07/2023 14:18

Hi John,

ticket [Ticket#2023080710000018] has been created in queue Postmaster.

Lacey Green wrote:

Nulla vehicula arcu sit amet eros malesuada, sit amet scelerisque turpis ultricies. In nec ligula sapien. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia curae; Etiam libero nunc, bibendum vitae pretium quis, tristique sed nisl. Etiam vel ante ante. Nam varius ac libero et efficitur. Curabitur eu tincidunt felis, a molestie nulla. Praesent augue libero, tincidunt eu quam at, fringilla interdum arcu. Interdum et malesuada fames ac ante ipsum primis in faucibus. Aliquam egestas eu felis ut elementum. Ut dignissim accumsan ex quis fringilla. Vestibulum lacinia turpis ac sem pretium lacinia.

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

-- OTRS Notifications

Show Ticket

Fig. 108: Notification Details

Warning: The notifications will be deleted without confirmation.

1.11 Ticket Watchlist Overview

This feature allows you to manage several watchlists. A ticket agent defines watchlists and assigns tickets to a watchlist. Within the watchlist overview, the agent gets an overview of all of his watchlists and can administer them.

Note: The feature should be turned on with `Ticket::Watchlist` setting first. In order to restrict this feature to specific groups, verify the `Ticket::WatchlistGroup` setting in the system configuration. By default, all users will have access to this feature.

It is possible to customize the watch list notifications in the *Ticket Notifications* screen.

When the feature is enabled, the agent can perform the following actions.

Define notification events for each watchlist

The agent is able to administer the following events which trigger an email notification to himself:

- new article
- change of customer
- change of owner
- change of queue
- change of ticket status to a defined status

This email notification is independent of the notification preferences of the current owner of the ticket –unlike the standard subscribe/watchlist feature of **OTRS**.

Assign a watchlist to another agent

A watchlist can be handed over to another agent. The list will disappear in the overview of the former owner and appear in the overview of the new owner. This feature is typically used to hand the list over to another agent when the original agent goes on vacation.

Assign a deputy

One or more deputy agents can be assigned to a watchlist. A deputy then sees the new watchlist in his overview, and he is allowed to add or remove tickets to or from this watchlist. This feature is typically used to share a watchlist with colleagues to work on a ticket in a team.

Export to CSV

The list can be exported to a CSV file, e. g. to process it in Excel.

Use this screen to manage watchlists. The ticket watchlist overview screen is available from the organizer via the glasses icon.

This screen is not designed for accessing tickets which are assigned to a ticket watchlist. To see all tickets which are assigned to a ticket watchlist, there is a new filter *Watchlist* available in all ticket lists.



 > Ticket Watchlist Overview (2)







	Watchlist Name	Agent Article Notify	Customer Article Notify	Owner Change Notify	Queue Change Notify	Actions
	Ordering	no	yes	no	no	    
	Sales	yes	no	yes	no	    

Fig. 109: Ticket Watchlist Overview Screen

Open  















State	Lock	Queue	Owner	Customer ID	Watch	
new	unlocked	Postmaster	Admin OTRS	supersupport		 
new	unlocked	Postmaster	Admin OTRS	supersupport		 
new	unlocked	Postmaster	Admin OTRS	supersupport		 
open	locked	Raw	John Smith	supersupport		--- 
open	unlocked	Raw	Admin OTRS	supersupport		--- 

Fig. 110: Ticket Watchlist Column in Ticket List

1.11.1 Manage Watchlists

To add a watchlist:

1. Click on the plus icon in the breadcrumb bar.
2. Fill in the required field.
3. Click on the *Save* button.

To export the ticket list from a watchlist:

1. Click on the export button in the *Actions* column of a watchlist.
2. Select the export format.
3. Click on the *Download File* button.
4. Save the file somewhere in the file system.

To edit a watchlist:

1. Click on the edit button in the *Actions* column of a watchlist.
2. Modify the field.
3. Click on the *Save* button.

To change the watchlist owner:

1. Click on the person icon in the *Actions* column of a watchlist.
2. Select an agent from the list.
3. Click on the *Save* button.

Warning: The original owner agent will not have access to the watchlist anymore.

To assign deputies to a watchlist:

1. Click on the police badge icon in the *Actions* column of a watchlist.
2. Select deputy agents from the list.
3. Click on the *Save* button.

To delete a watchlist:

1. Click on the trash icon in the *Actions* column of a watchlist.
2. Click on the *Yes* button in the confirmation dialog.

Tickets can be added to the watchlist or removed from the watchlist in the [Tickets](#) screen.

1.11.2 Watchlist Settings

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

Name *

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

Color *

The color associated to the watchlist. This color will be displayed in the ticket detail view when a watchlist is selected for the ticket.

Notify On

Select the events that will trigger a notification.

New Agent Article

Select, if the watchlist owner should be notified, when an agent adds a note to a ticket added to the watchlist.

New Customer Article

Select, if the watchlist owner should be notified, when a customer user creates an article in the external interface.

New Owner

Select, if the watchlist owner should be notified, when a ticket added to the watchlist has a new owner.

New Queue

Select, if the watchlist owner should be notified, when a ticket added to the watchlist has been moved to an other queue.

New State

Select, if the watchlist owner should be notified, when a state is changed for a ticket added to the watchlist.

Target States

Notifications for status changes are only being sent if the new status matches the configured destination status.

If the *New State* notification above is selected, this field becomes mandatory.

Watchlist owners and their deputies can configure the notifications separately. The configuration of the destination status is only allowed for the watchlist owner and therefore also affects the deputies.

Notifications are not being sent to the agent who triggered the action.

See also:

The content of the notifications can be edited in the ticket detail view when the ticket is assigned to a watchlist. See the [Tickets](#) chapter for more details.

1.12 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.

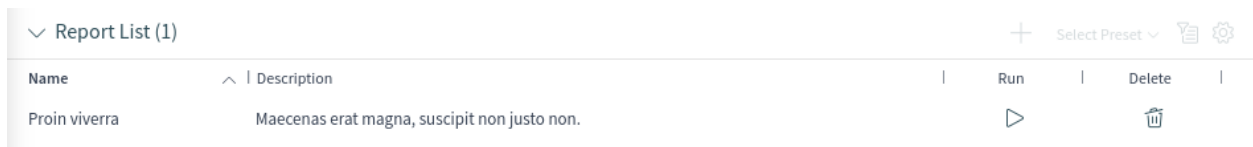
1.12.1 Reports

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.



Name	Description	Run	Delete
Proin viverra	Maecenas erat magna, suscipit non justo non.		

Fig. 111: 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

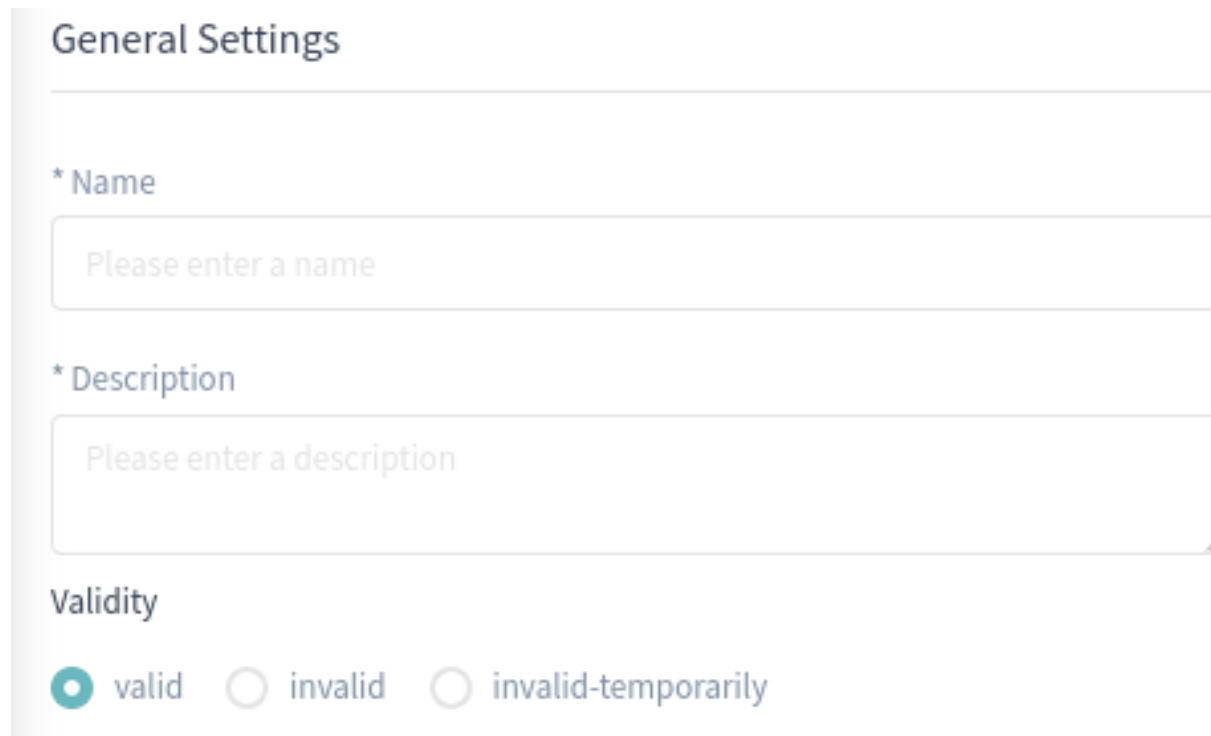
No email will be sent automatically.

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.



The screenshot shows a web form titled "General Settings". It contains two required text input fields: "* Name" and "* Description", both with placeholder text "Please enter a name" and "Please enter a description" respectively. Below these is a "Validity" section with three radio button options: "valid" (selected), "invalid", and "invalid-temporarily".

Fig. 112: General Report Information

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.

Preamble

The preamble text of 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. 113: Automatic Generation Settings

Output Settings

Headline

Title

Caption for Preamble

Preamble

Caption for Epilogue

Epilogue

Fig. 114: Output Settings

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:

1. Select a report in the *Report List* widget.
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:

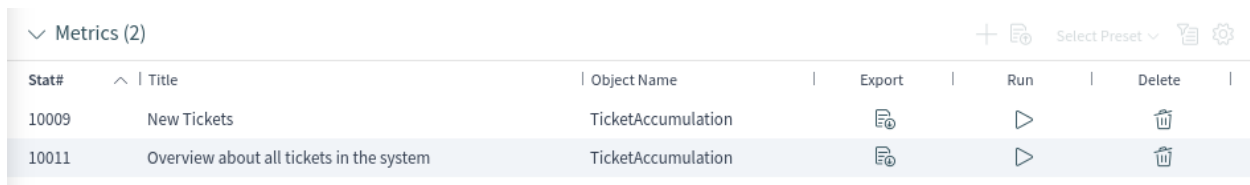
1. Click on the trash icon in the *Delete* column.
2. Click on the *Yes* button in the confirmation dialog.

1.12.2 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.



Metrics (2)		+ [Icon] Select Preset [Icon] [Icon]			
Stat#	^ Title	Object Name	Export	Run	Delete
10009	New Tickets	TicketAccumulation	[Icon]	[Icon]	[Icon]
10011	Overview about all tickets in the system	TicketAccumulation	[Icon]	[Icon]	[Icon]

Fig. 115: Metrics Widget

Lists Widget

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

Static Widget

This widget lists the static statistics.

Lists (8)		+ [icon] Select Preset [icon] [icon] [icon]			
Stat#	^ Title	Object Name	Export	Run	Delete
10001	List of open tickets, sorted by time left until escalation deadline expires	Ticketlist	[icon]	[icon]	[icon]
10002	List of open tickets, sorted by time left until response deadline expires	Ticketlist	[icon]	[icon]	[icon]
10003	List of open tickets, sorted by time left until solution deadline expires	Ticketlist	[icon]	[icon]	[icon]
10004	List of the most time-consuming tickets	Ticketlist	[icon]	[icon]	[icon]
10005	List of tickets closed last month	Ticketlist	[icon]	[icon]	[icon]
10006	List of tickets closed, sorted by response time.	Ticketlist	[icon]	[icon]	[icon]
10007	List of tickets closed, sorted by solution time	Ticketlist	[icon]	[icon]	[icon]
10008	List of tickets created last month	Ticketlist	[icon]	[icon]	[icon]

Fig. 116: Lists Widget

Static (2)		+ [icon] Select Preset [icon] [icon] [icon]			
Stat#	^ Title	Object Name	Export	Run	Delete
10013	Changes of status in a monthly overview	StateAction	[icon]	[icon]	[icon]
10014	Response Statistic	OTRSStatsResponseStatistic	[icon]	[icon]	[icon]

Fig. 117: Static Widget

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 entity.
 - Static: Non-configurable complex statistics.
3. Fill in the general information about the statistic.

Title *

Add a title for the statistic.

Description *

Longer 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.

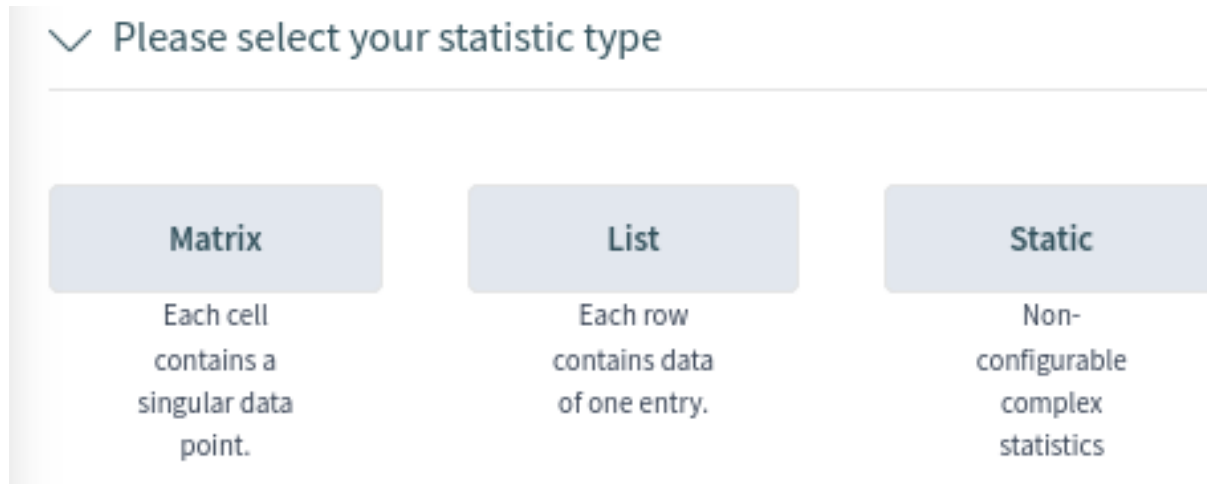


Fig. 118: Statistic Type Selection

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.

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

- 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.

- 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.

- Select the filters for the data.

- 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:

- Select a statistic in any statistic widget.

▼

General

* Title


Enter...

* Description

Enter...

* Object


Ticketlist

* Permissions 


stats ×


* Format

Print × CSV × Excel ×

* Time Zone 

UTC

☐ Create summation row 

☐ Create summation column 


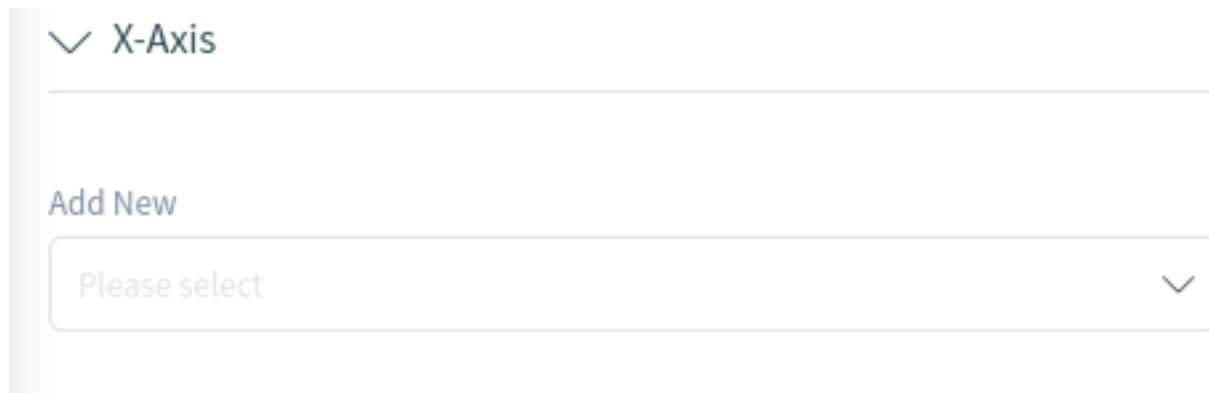
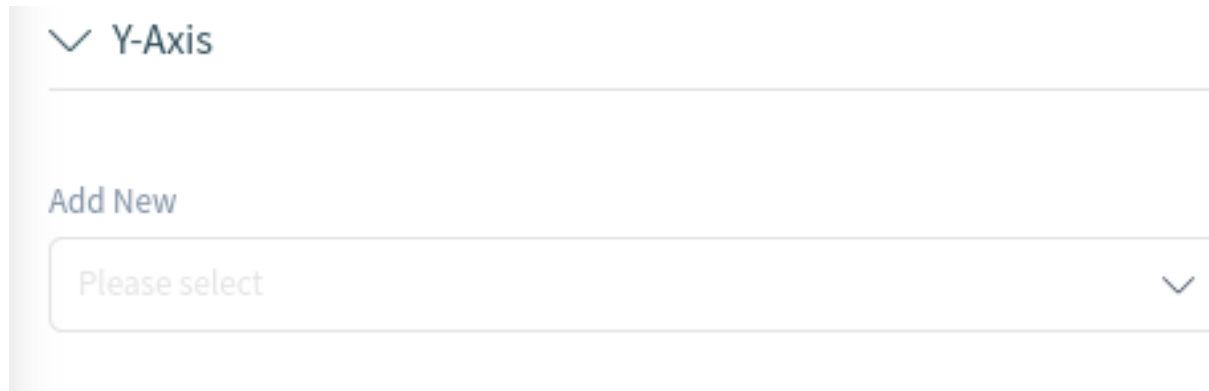
☒ Valid 

Fig. 119: General Statistic Information



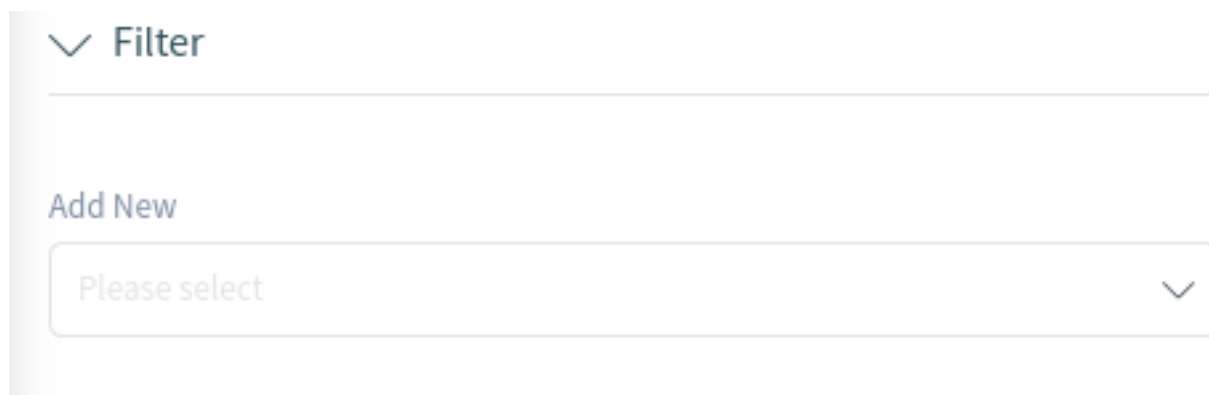
The screenshot shows a configuration panel for the X-Axis. At the top, there is a section header "X-Axis" with a downward-pointing chevron icon to its left. Below this header is a horizontal line. Underneath the line, the text "Add New" is displayed. Below "Add New" is a large, rounded rectangular input field. Inside this field, the text "Please select" is visible in a light gray font. To the right of the input field is a small, downward-pointing chevron icon.

Fig. 120: Configure X-Axis



The screenshot shows a configuration panel for the Y-Axis. At the top, there is a section header "Y-Axis" with a downward-pointing chevron icon to its left. Below this header is a horizontal line. Underneath the line, the text "Add New" is displayed. Below "Add New" is a large, rounded rectangular input field. Inside this field, the text "Please select" is visible in a light gray font. To the right of the input field is a small, downward-pointing chevron icon.

Fig. 121: Configure Y-Axis



The screenshot shows a configuration panel for the Filter. At the top, there is a section header "Filter" with a downward-pointing chevron icon to its left. Below this header is a horizontal line. Underneath the line, the text "Add New" is displayed. Below "Add New" is a large, rounded rectangular input field. Inside this field, the text "Please select" is visible in a light gray font. To the right of the input field is a small, downward-pointing chevron icon.

Fig. 122: Add Filters

Preview Statistic

Preview Type

Print

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

Number	Ticket#	Age	Title	
1	2023080710000018	20 h 18 m	Etiam viverra dignissim ligula	2023
2	2023072610000412	12 d 20 h	Vestibulum pretium dolor	2023
3	2023072610000421	12 d 20 h	Nullam eget justo mi	2023
4	2023072610000403	12 d 20 h	Donec tortor augue	2023
5	2023072610000396	12 d 20 h	Mauris id blandit justo, ut cursus ligula	2023
6	2023072610000387	12 d 20 h	Donec id euismod lorem	2023
7	2023072610000378	12 d 20 h	Nunc gravida?	2023

Fig. 123: Preview 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. Review the settings and change them in the new screen if needed.
3. Click on the *Run Statistic* button.

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 units of the time units stored in the articles.

Age

The relative time 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) only if first response escalation time is set.

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.

Explanation for Static Statistics

Changes of status in a monthly overview

Monthly overview, which reports status changes per day of a selected month.

Response Statistic

This static type statistic makes it possible to count how many times a response template has been used on a time frame. The result can be filtered by a time period and by queues.

Statistics for Queue Resting Time

You are able to calculate the resting time of tickets for queues with this statistic module. The statistic considering also the close times of tickets. This accounted time will not added to the resting time or the resting time based on working period. The resting time based on working periods will be only displayed if you have configured calendars for your queues.

Available columns are:

- Number: numeration of the ticket list.
- Ticket#: ticket number.
- Ticket ID: internal ID of the ticket.
- Created: ticket creation date.
- Changed: last change date of the ticket.
- Closed: last close date of the ticket.
- Status: current state of the ticket.
- Type: current type of the ticket.
- Queue: current queue based on the history entries.
- Queue join time: date based on history entries (ticket created in this queue, moved into this queue while being open or reopened in this queue).
- Queue left time: date based on history entries (ticket closed in this queue or moved out of this queue while being open). Empty if ticket was still open and in this queue at end of reporting time-frame.
- Resting time (seconds): count of the duration when the ticket stayed in the queue, based on join and left time. Times in which a ticket was closed will not be counted.
- Resting time (HH:MM:SS): count of the duration when the ticket stayed in the queue, formatted as hours, minutes and seconds.
- Resting time (Working hours, seconds): count of the duration when the ticket stayed in the queue based on the queue configured working calendars in the system configuration (this field will be empty if no calendar is configured).
- Resting time (Working hours, HH:MM:SS): formatted count of the duration when the ticket stayed in the queue based on the queue configured working calendars in the system configuration (this field will be empty if no calendar is configured).
- Criticality: current criticality of the ticket.

- Impact: current impact of the ticket.

To use the list object:

1. Create a new *List* statistic.
2. Choose the object `OTRSStatsQueueRestingTime`.
3. Configure the rest of the configuration options according to your wishes.
4. Run the statistic with output print or CSV.
5. All tickets matching the restrictions will be shown. Additional tickets will be shown, if they were created before the beginning of the reporting and were still open during the reporting time frame.

Statistics for Queue Working Time

This statistic is a modified ticket list to calculate the working time per queue. This modified ticket list statistic contains 3 new columns for the X-axis. In general the time for the 3 new columns is calculated on the time where ticket was not in a closed, removed or merged state type.

All queues in the system have the *Time*, *Working Time* and *Effective Time* column for this statistic object.

Example queue *Misc*:

- *Queue Misc Time* contains the time the agent have worked on the ticket.
- *Queue Misc Working Time* contains the time the agent have worked on the ticket based on the working calendars of the queue *Misc*.
- *Queue Misc Effective Time* contains the time the agent set as time units for the ticket while it was in the queue *Misc*. The values are displayed for each agent by first and last name in the same column (comma separated).

To use the list object:

1. Create a new *List* statistic.
2. Choose the object `OTRSStatsQueueWorkingTime`.
3. In the *X-axis* section, select the columns for the queue you like to display the working time or time.
4. Set all other restrictions and sort options you need for the statistic to complete the configuration.
5. Generate your statistic.

1.13 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 teams' 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.

1.13.1 Calendar Widgets

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

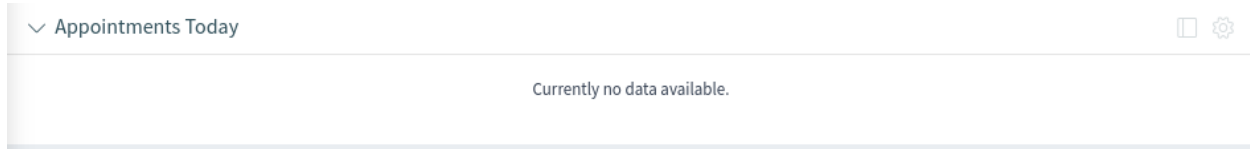


Fig. 124: No Calendars Found

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.

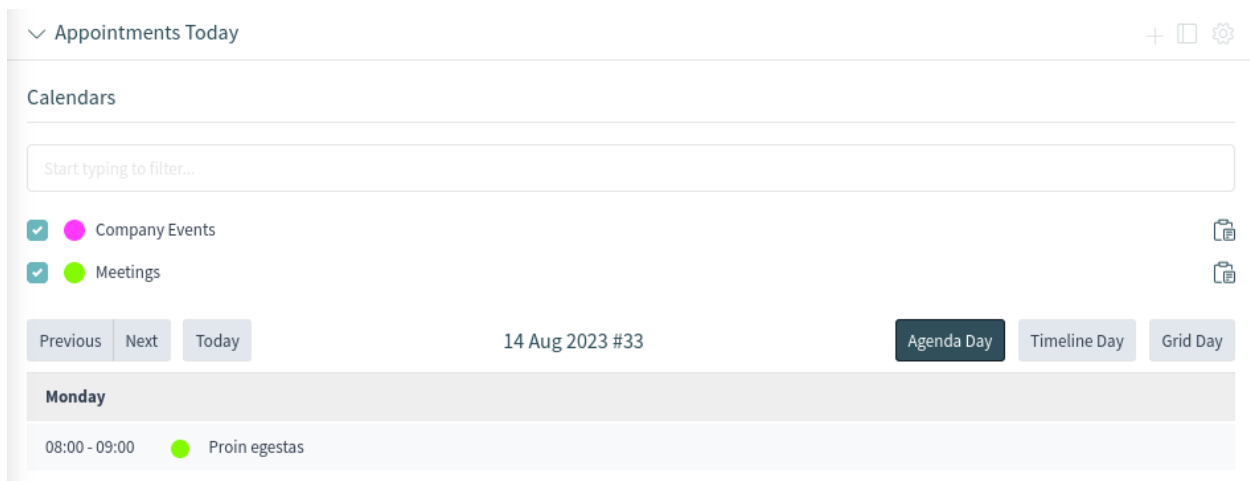


Fig. 125: Appointments Today Widget

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.

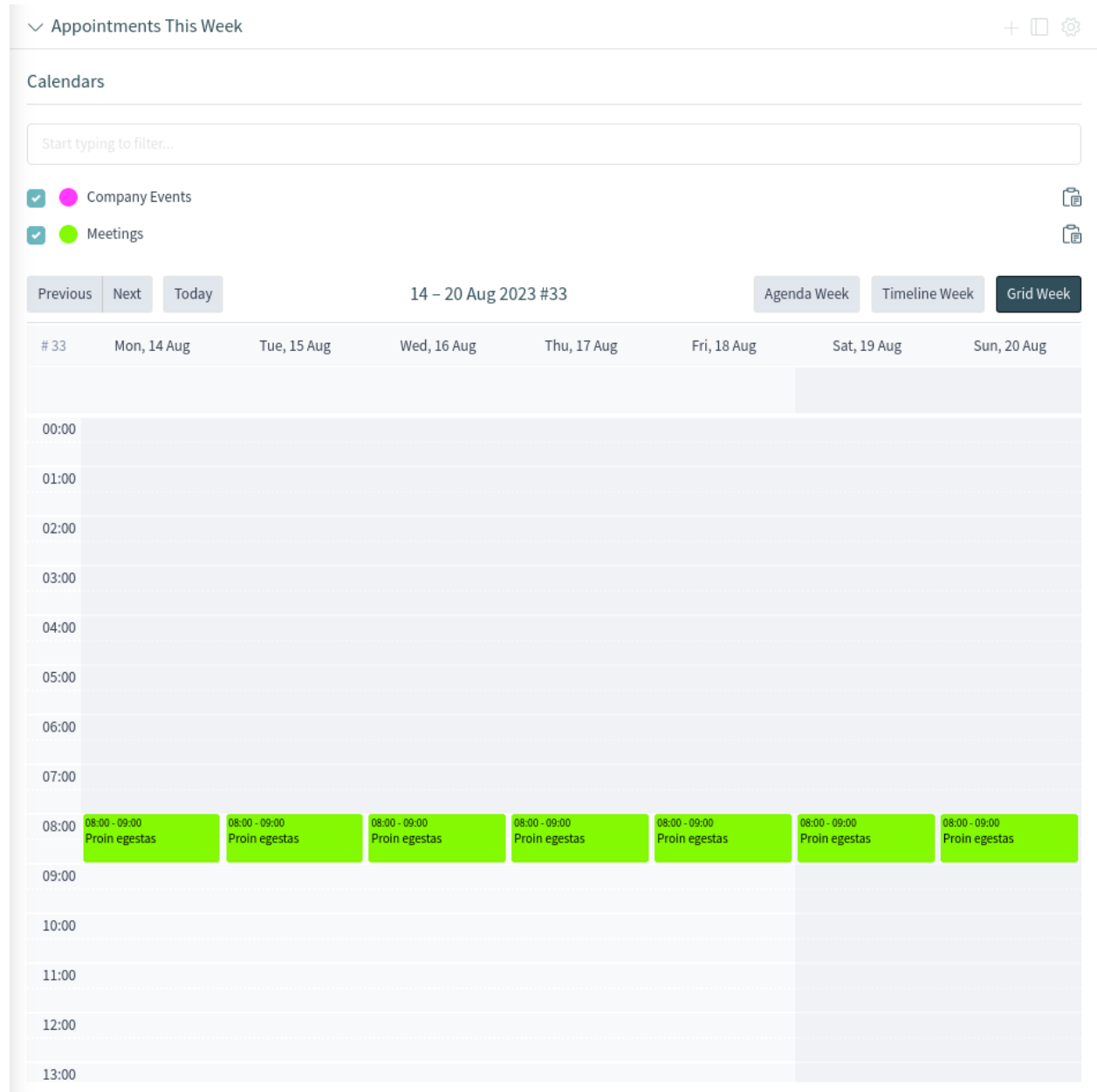


Fig. 126: Appointments This Week Widget

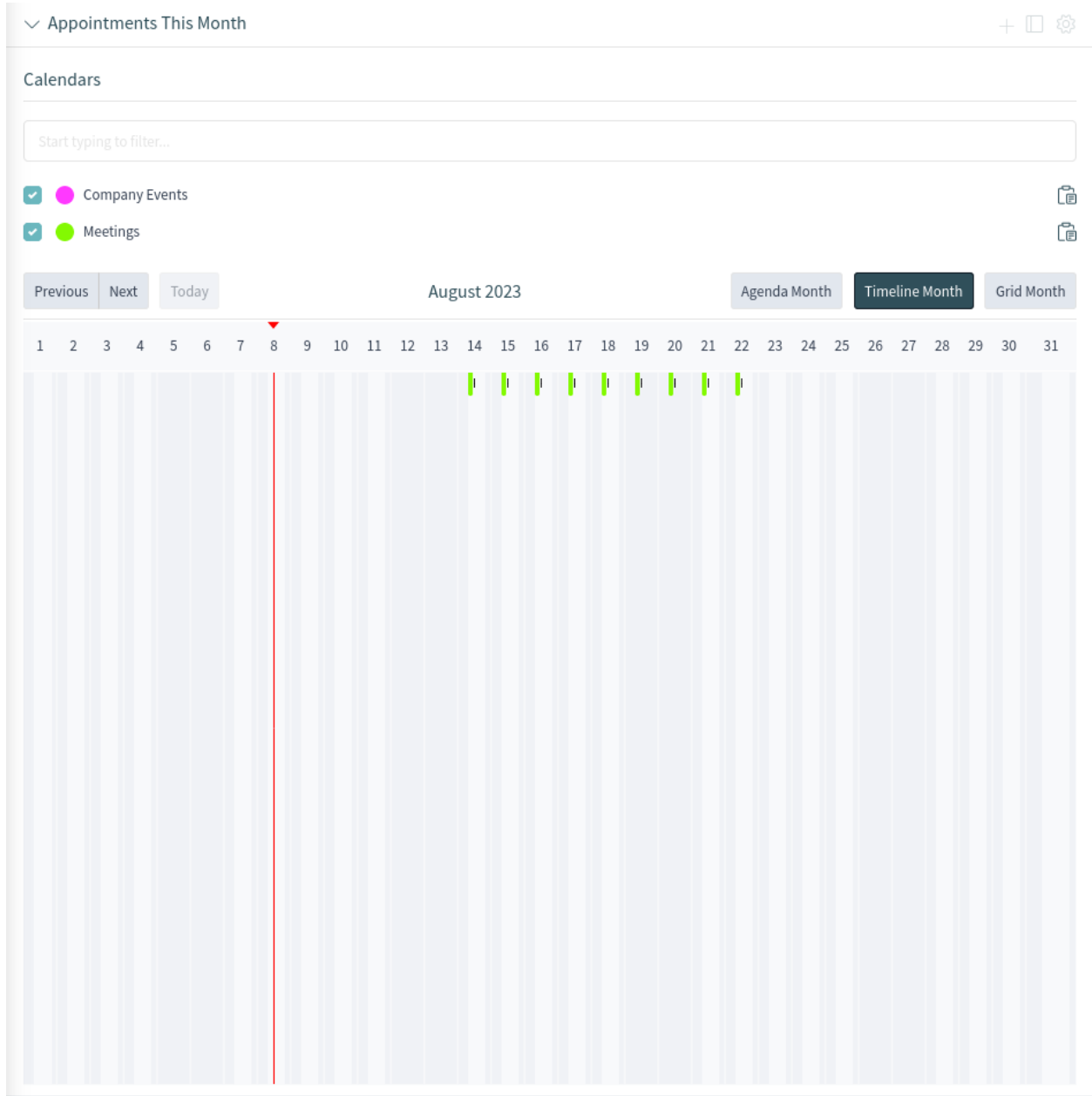


Fig. 127: Appointments This Month Widget

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.
3. Click on the *Delete* button.
4. Click on the *Yes* button in the confirmation dialog.

1.13.2 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.

Add Appointment

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

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

Cancel

Add

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.

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.

▼ Date & Time

☐ All day

* Start Date

* End Date

* Repeat

Frequency

Every

Limit

Until

Fig. 129: Repeating Appointments

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.

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.

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.

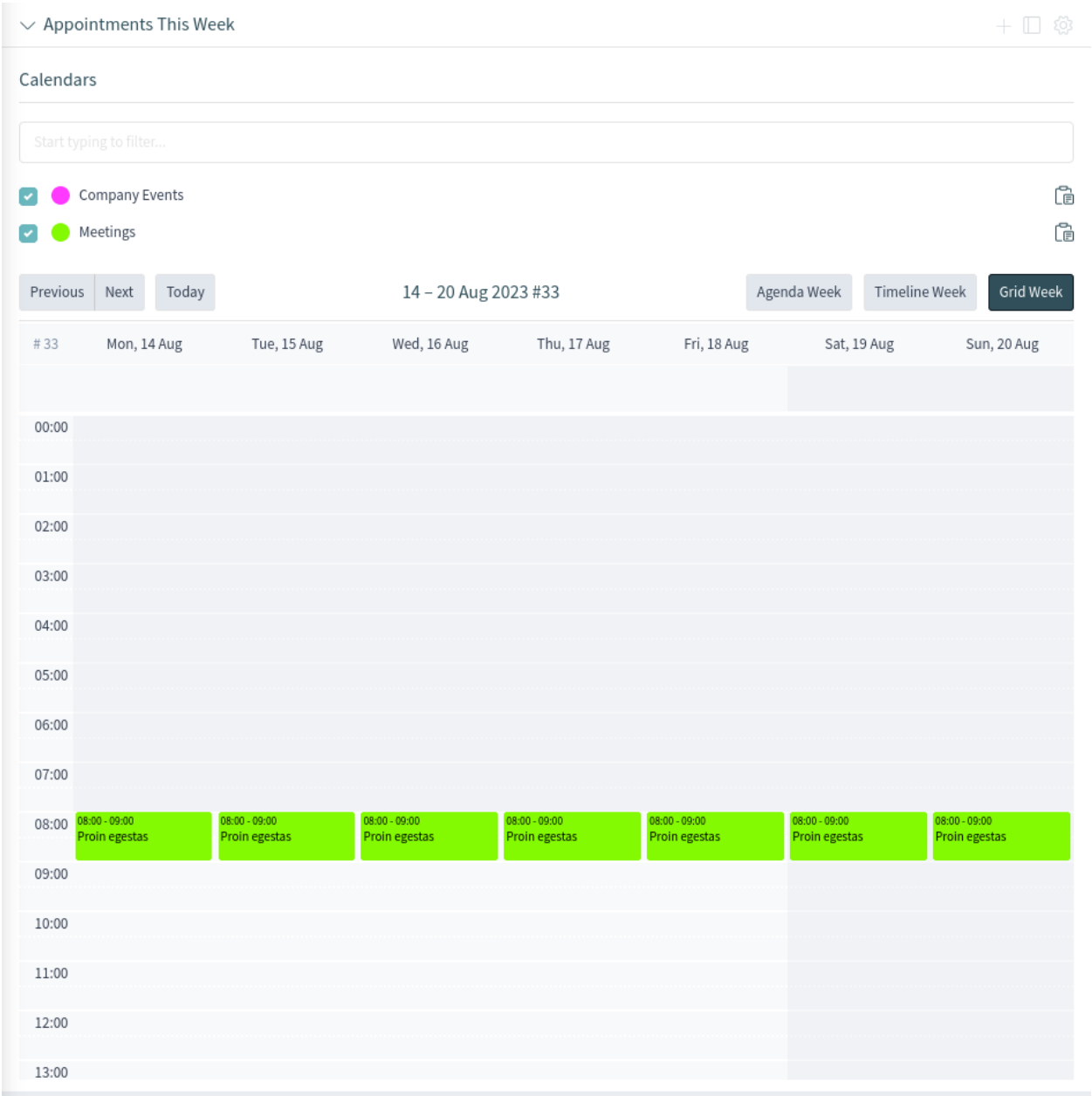





Fig. 130: Repeating Appointments Overview

Proin egestas



Basic Information


Location

Budapest 

Description

Pellentesque habitant morbi tristique senectus et netus.

Calendar

 Meetings

Date & Time

Start Date

08/16/2023 08:00

End Date

08/16/2023 09:00

Fig. 131: Repeating Appointments Details

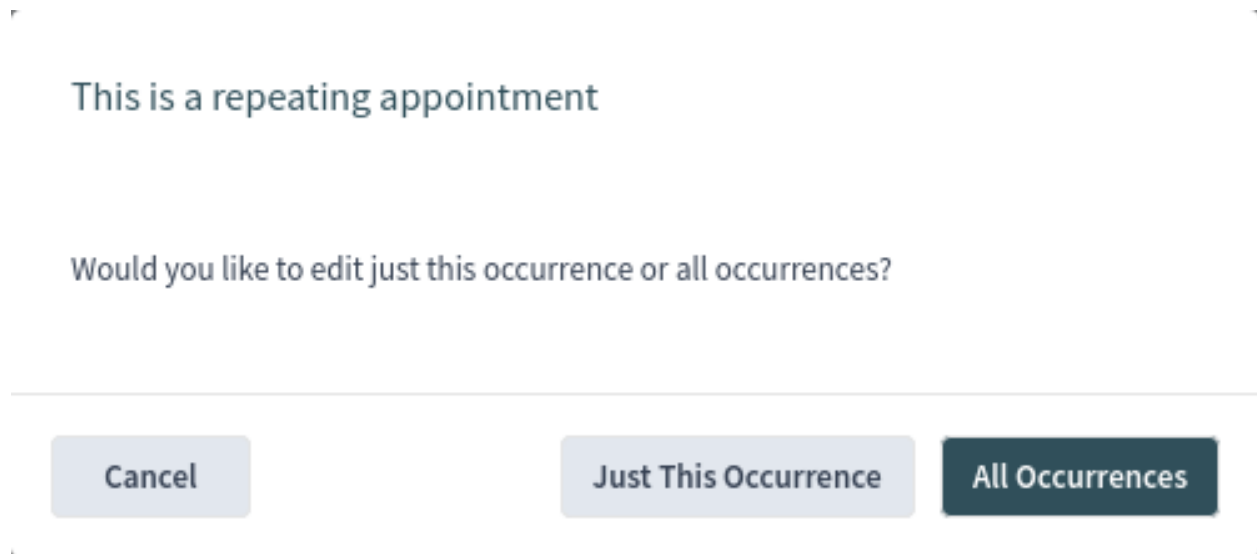


Fig. 132: Edit Repeating Appointment

1.14 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*.

1.14.1 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.

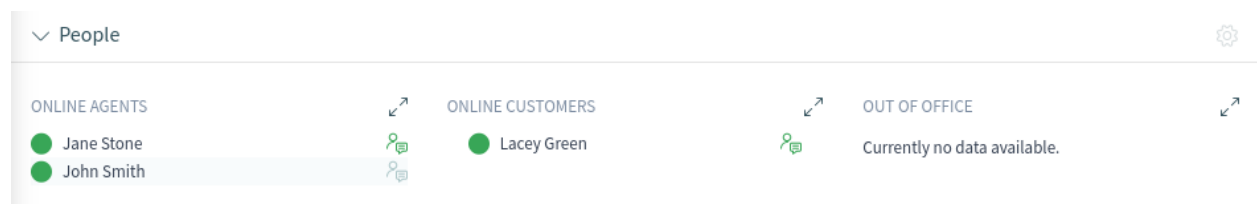


Fig. 133: People Widget

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

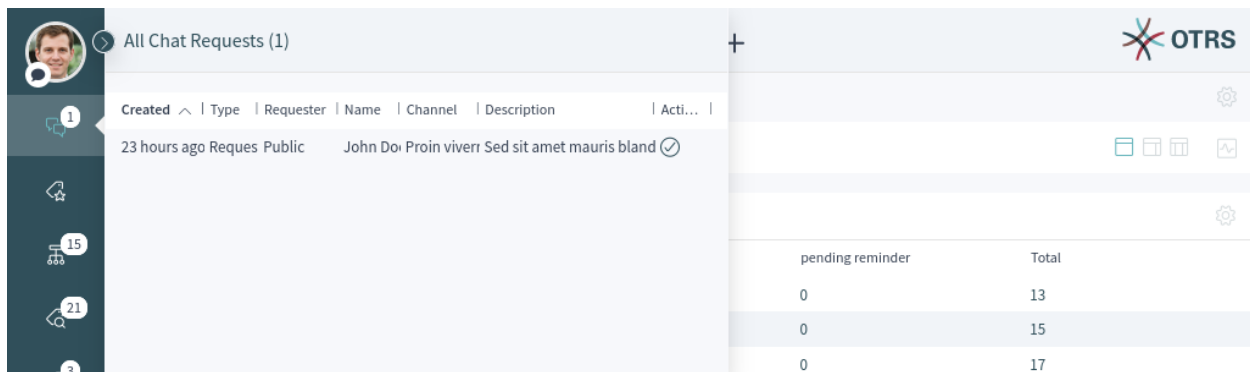
The user is set as unavailable for chats. This can be the case when an agent has disabled the chat availability in the *Personalization* menu or if the chat has been deactivated in the system configuration.

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.

1.14.2 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.



Created	Type	Requester	Name	Channel	Description	Acti...
23 hours ago	Reques	Public	John Do	Proin	viverr Sed sit amet mauris bland	✓

pending reminder	Total
0	13
0	15
0	17

Fig. 134: Chat Request List

To accept the chat request, click on the *Accept* icon in the *Action* column.

1.14.3 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.
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.
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.

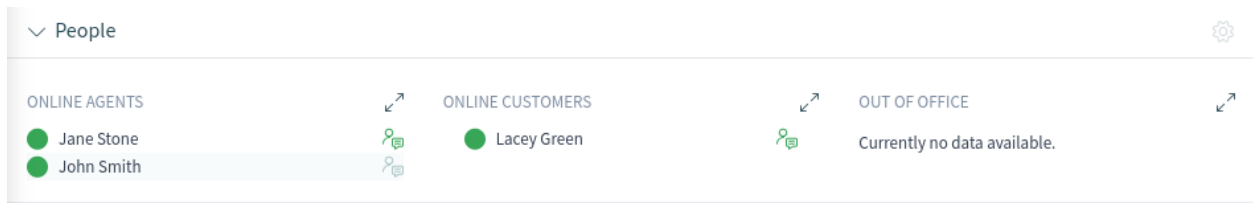


Fig. 135: Available Agents

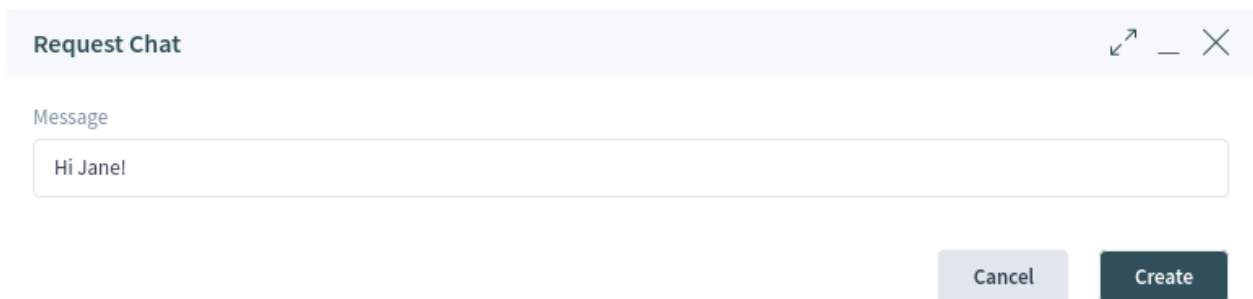


Fig. 136: Request Chat Dialog

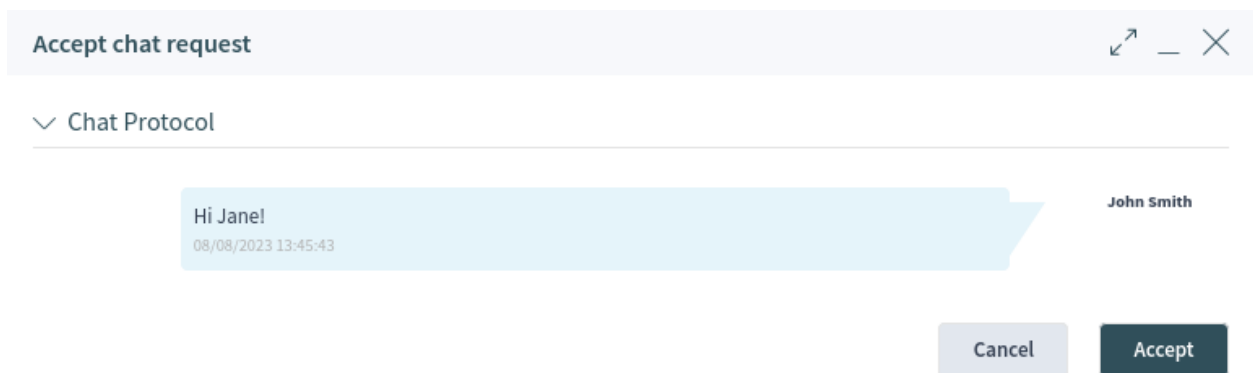


Fig. 137: Accept Chat Request Dialog

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

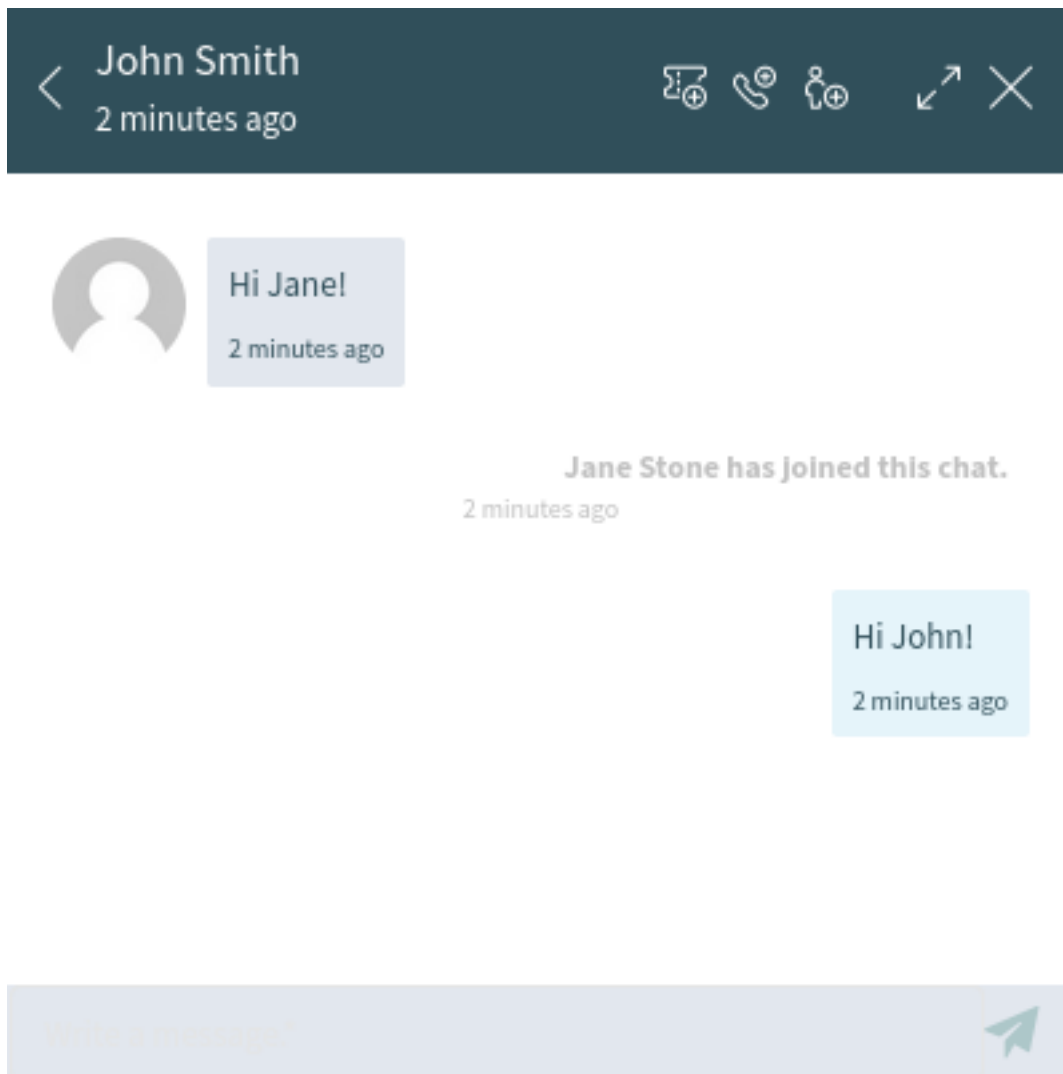


Fig. 138: Agent to Agent Chat

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.

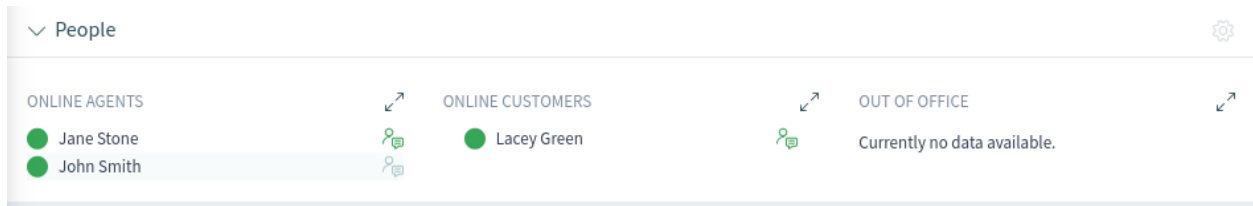


Fig. 139: Available Customer Users

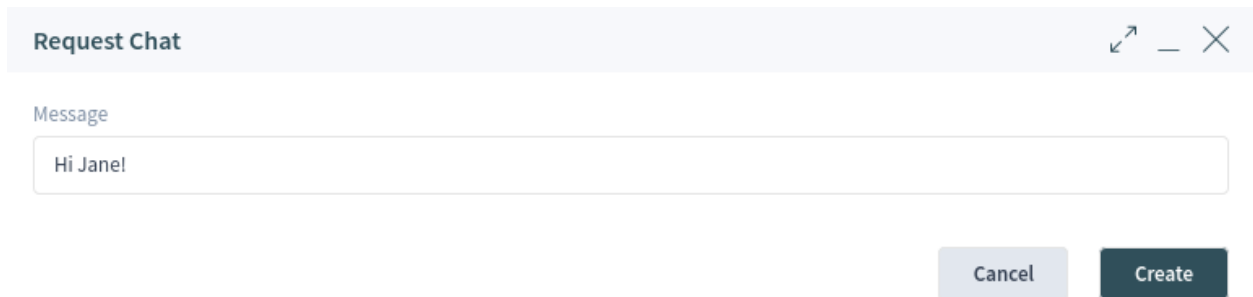


Fig. 140: Request Chat Dialog

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.



Fig. 141: Chat Request on 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.

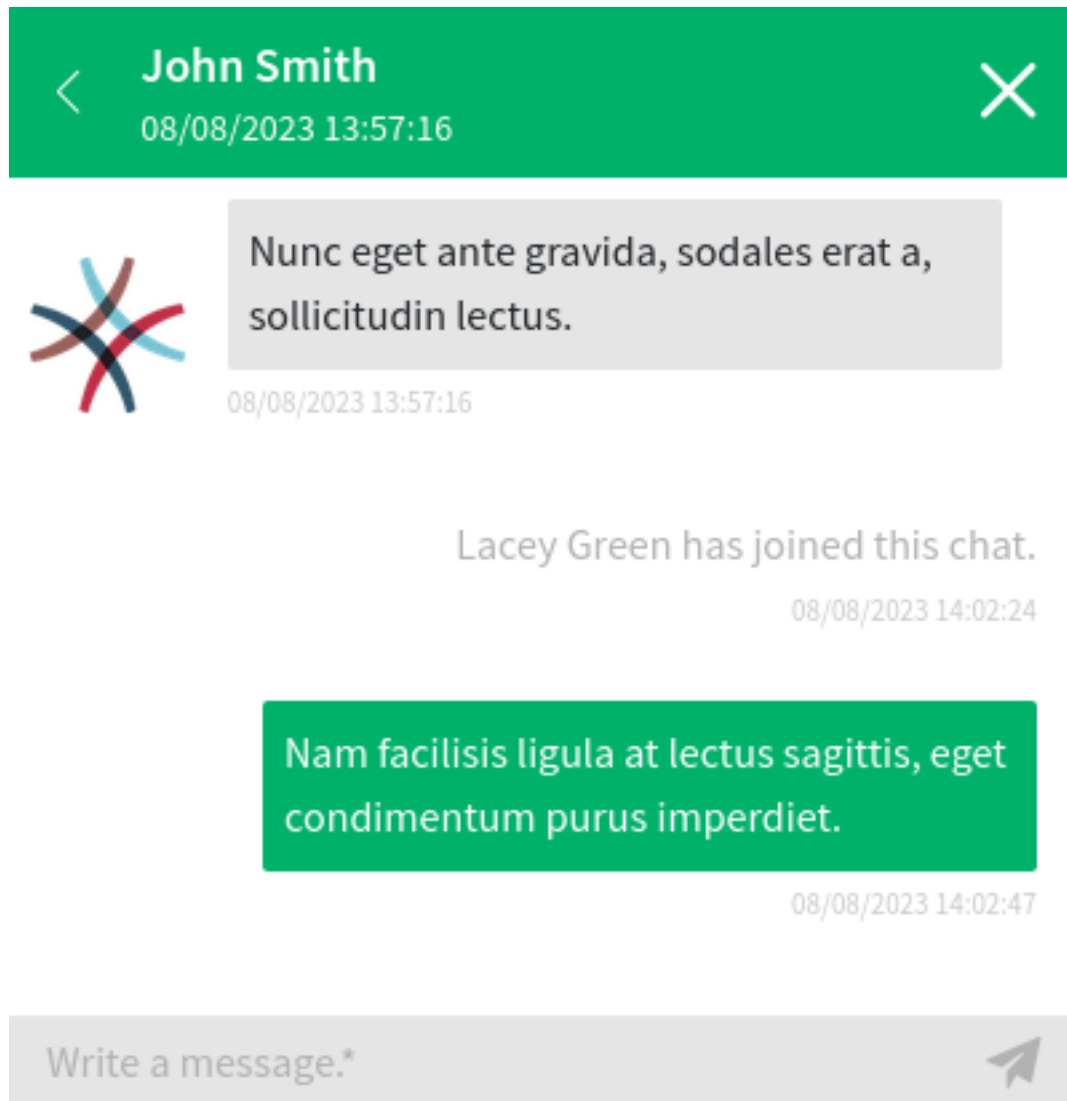
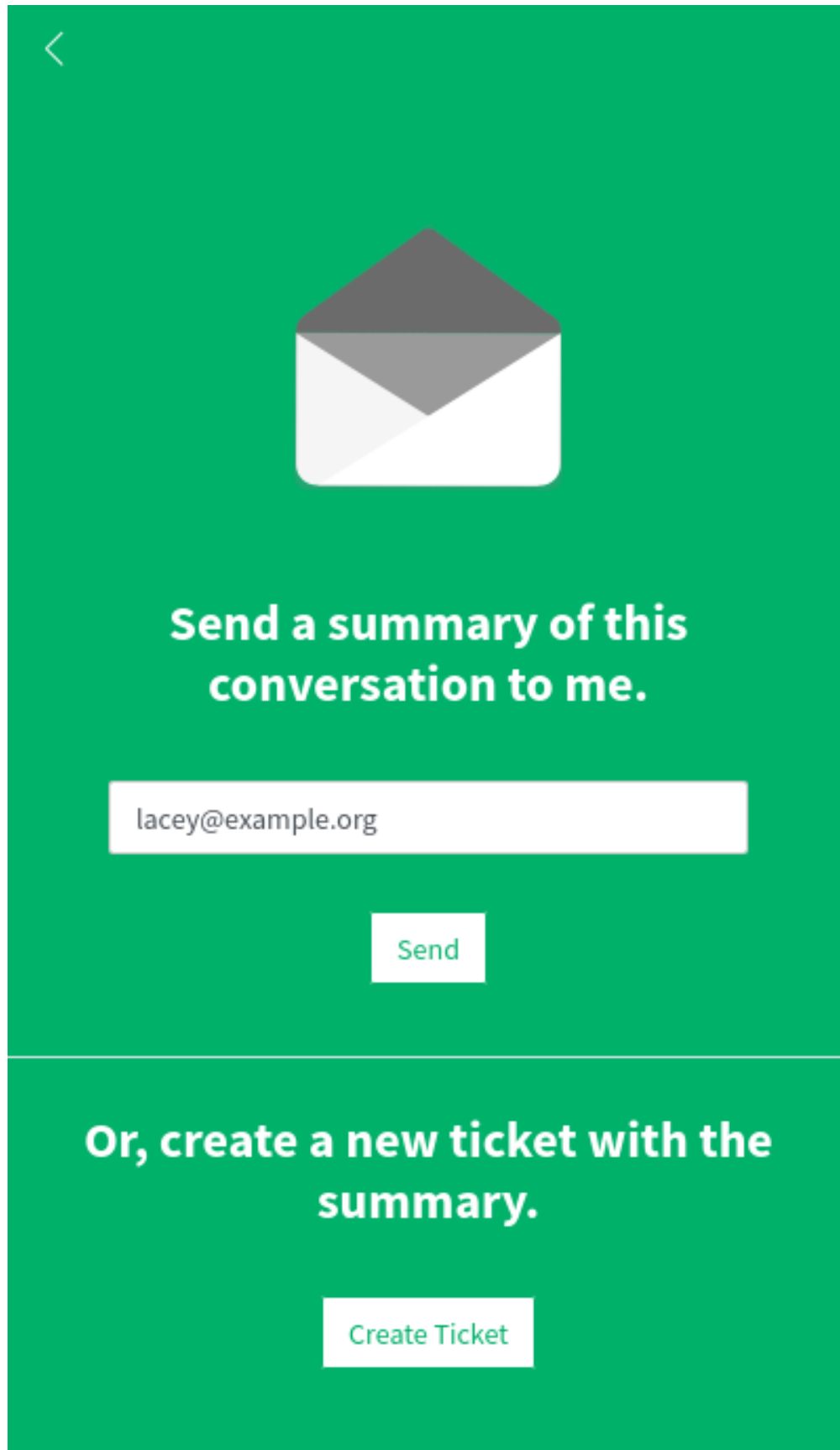



Fig. 142: Agent to Customer User Chat



<



Send a summary of this conversation to me.

lacey@example.org

Send

Or, create a new ticket with the summary.

Create Ticket

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.

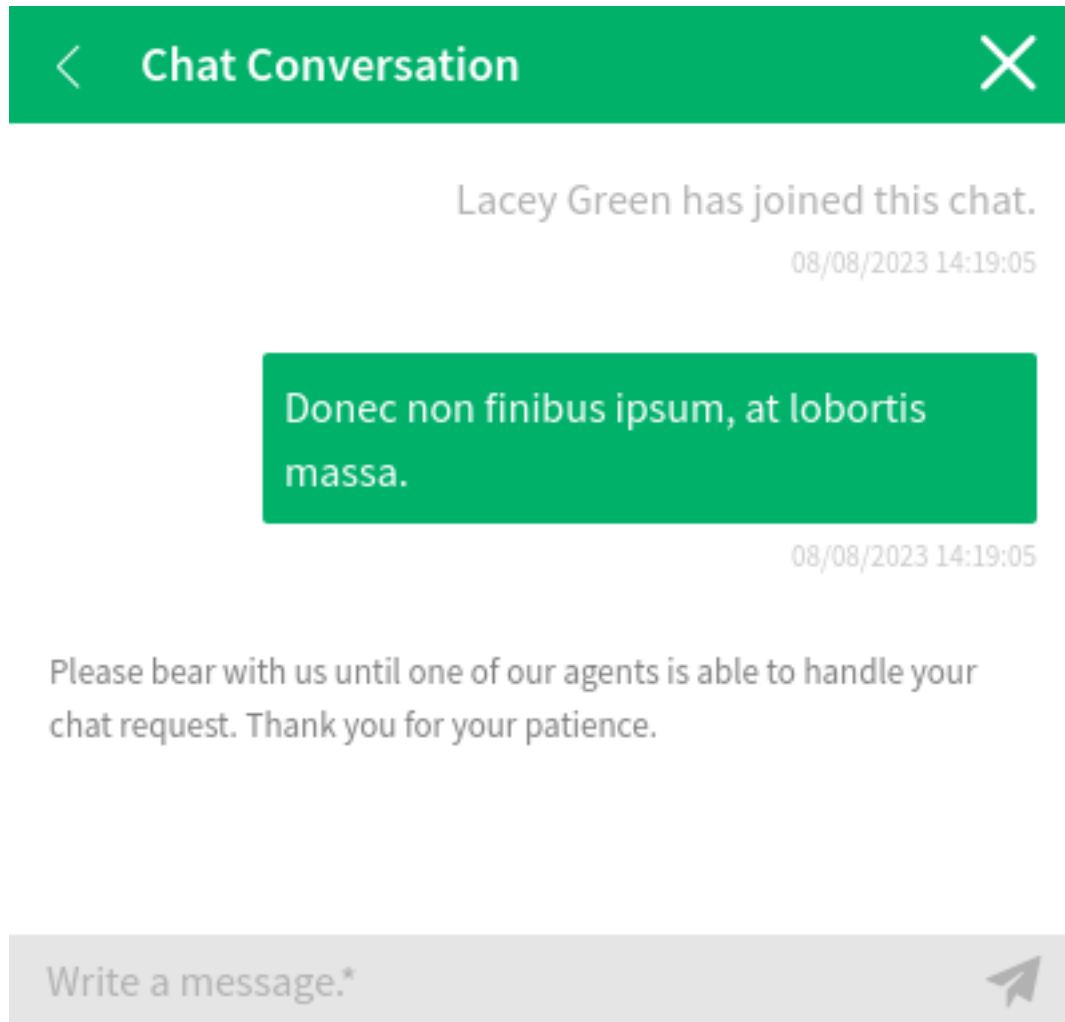


Fig. 144: Start Chat Window

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.
6. When an agent accepts the chat request, they can chat now.
7. The customer user will see the answer.

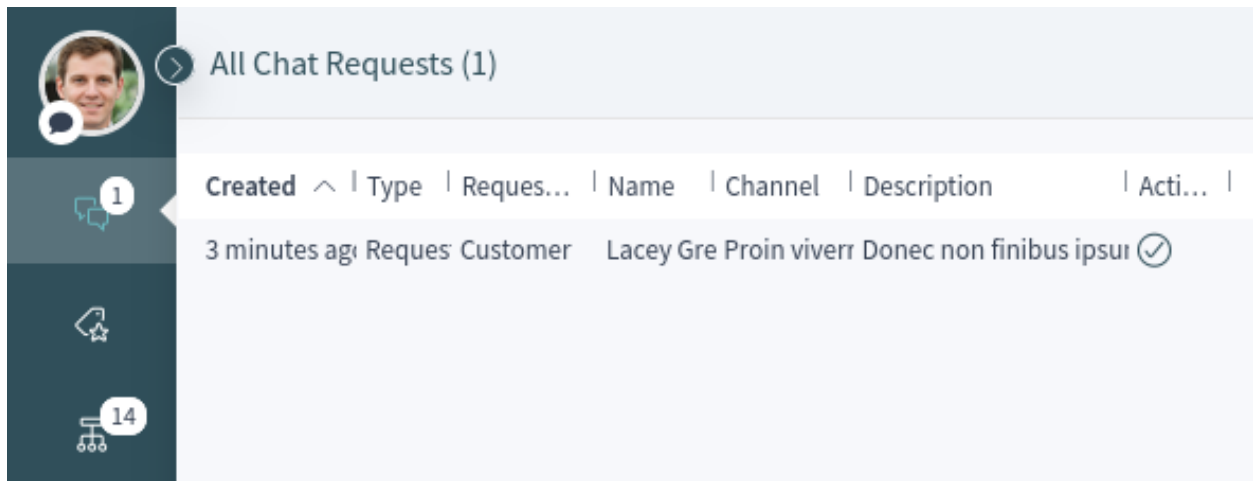


Fig. 145: General Chat Requests From Customers Widget

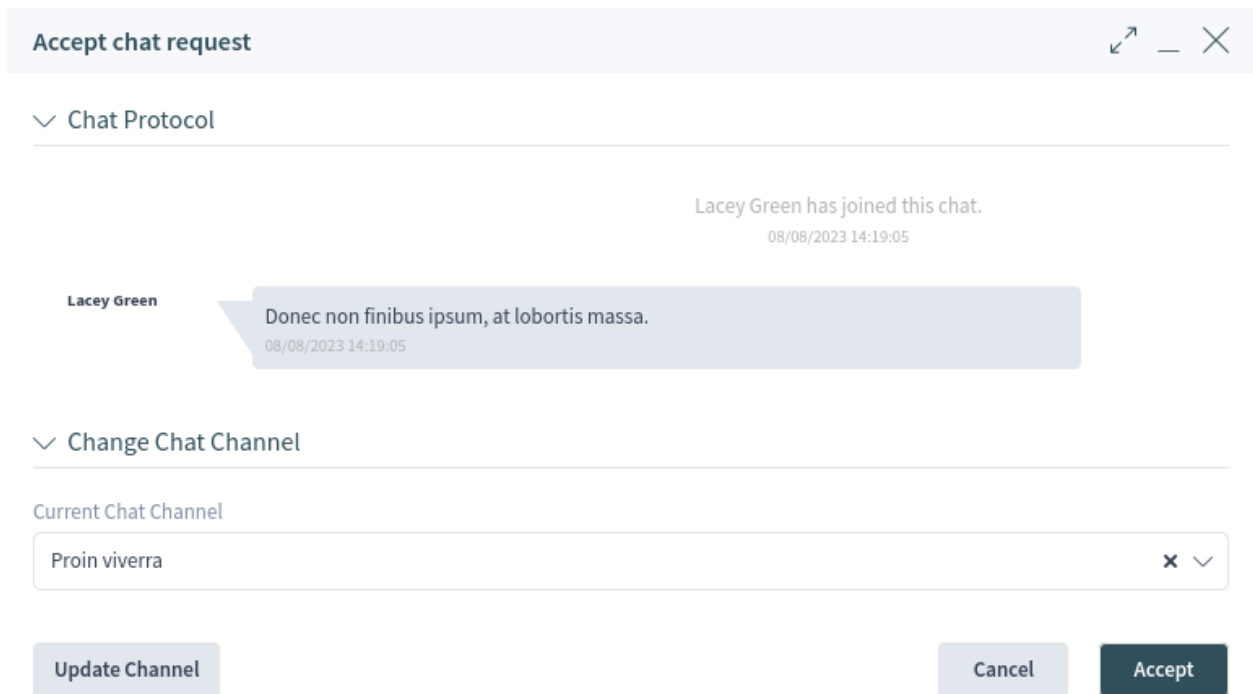


Fig. 146: Chat Preview Dialog

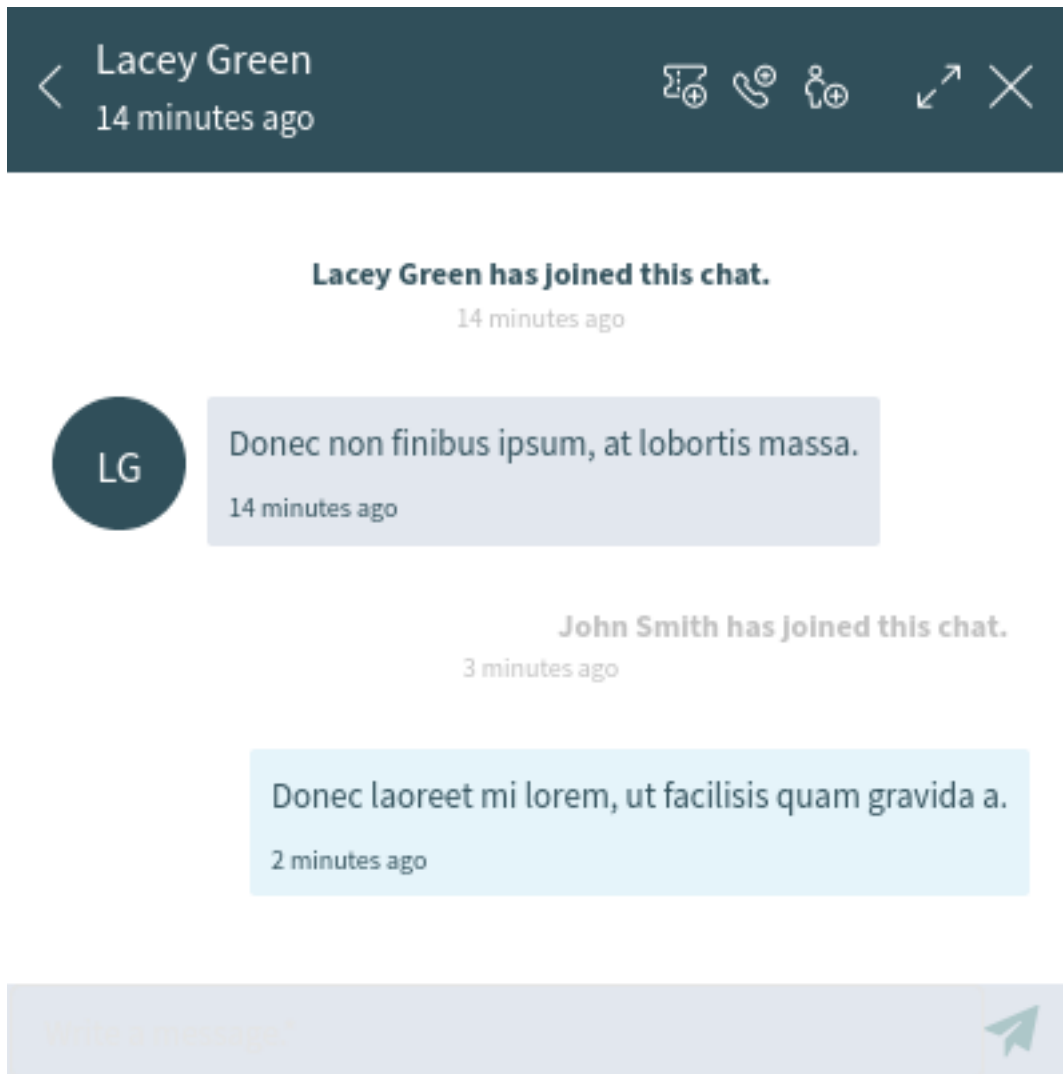


Fig. 147: Customer User to Agent Response

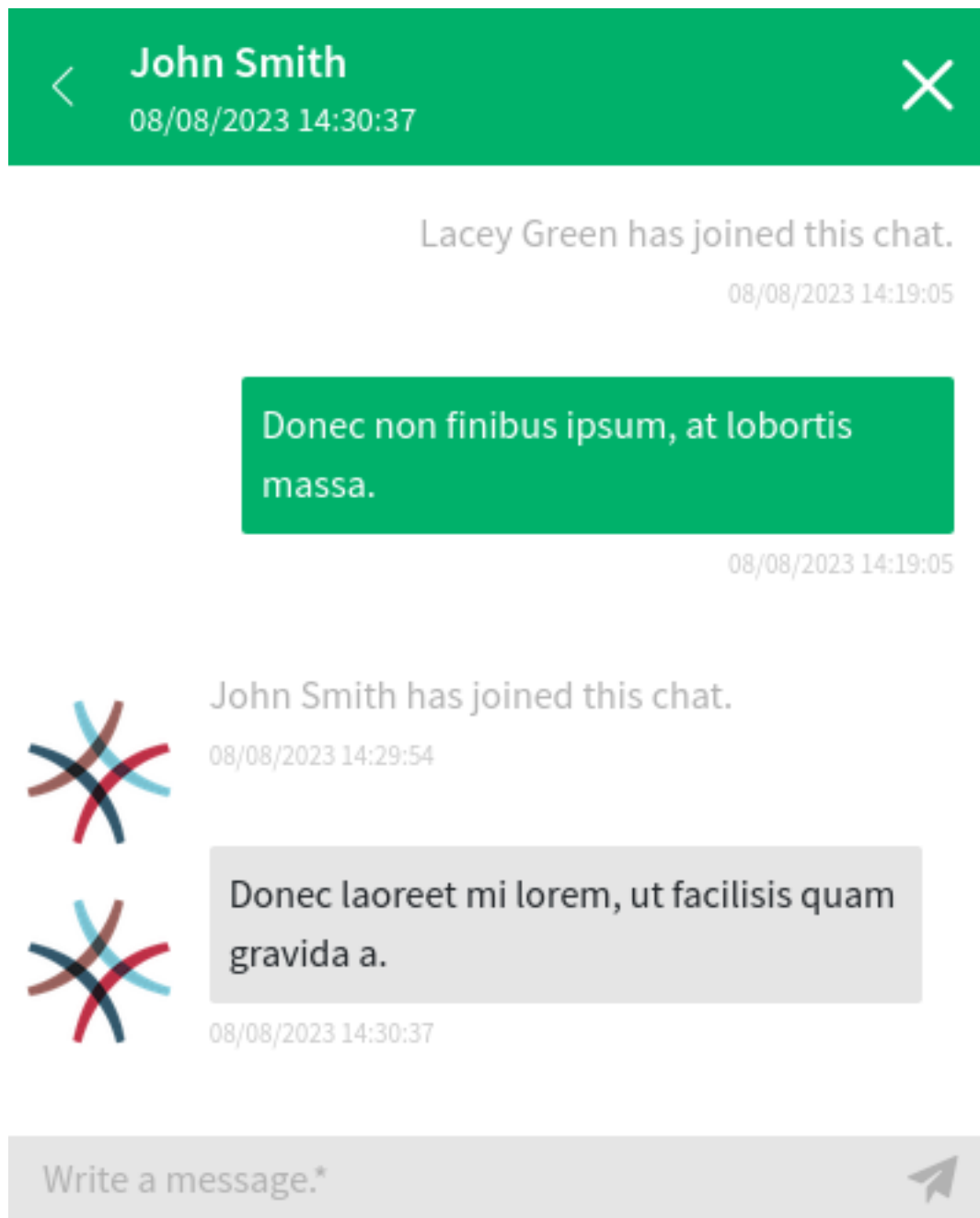


Fig. 148: Customer User Chat

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.

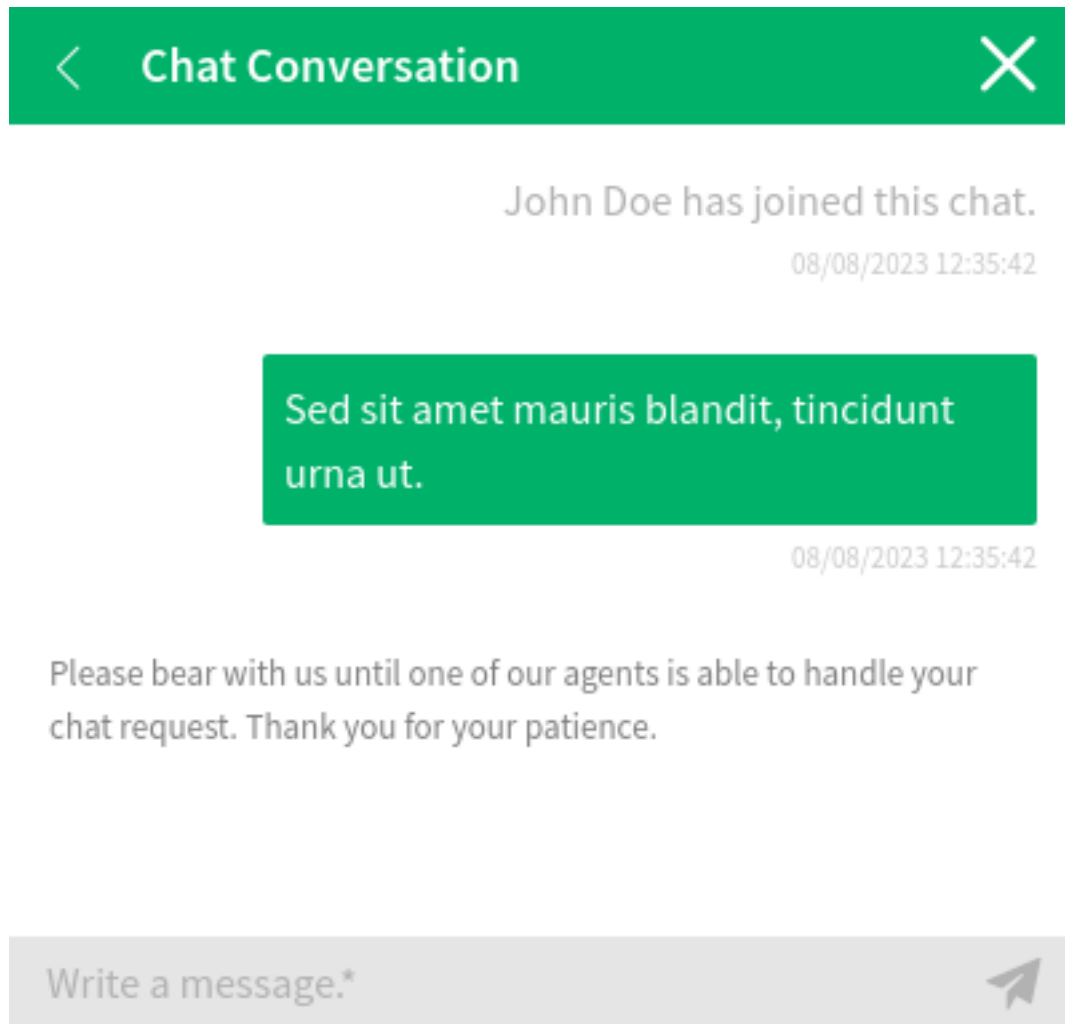


Fig. 149: Start Chat Window

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

1.14.4 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.

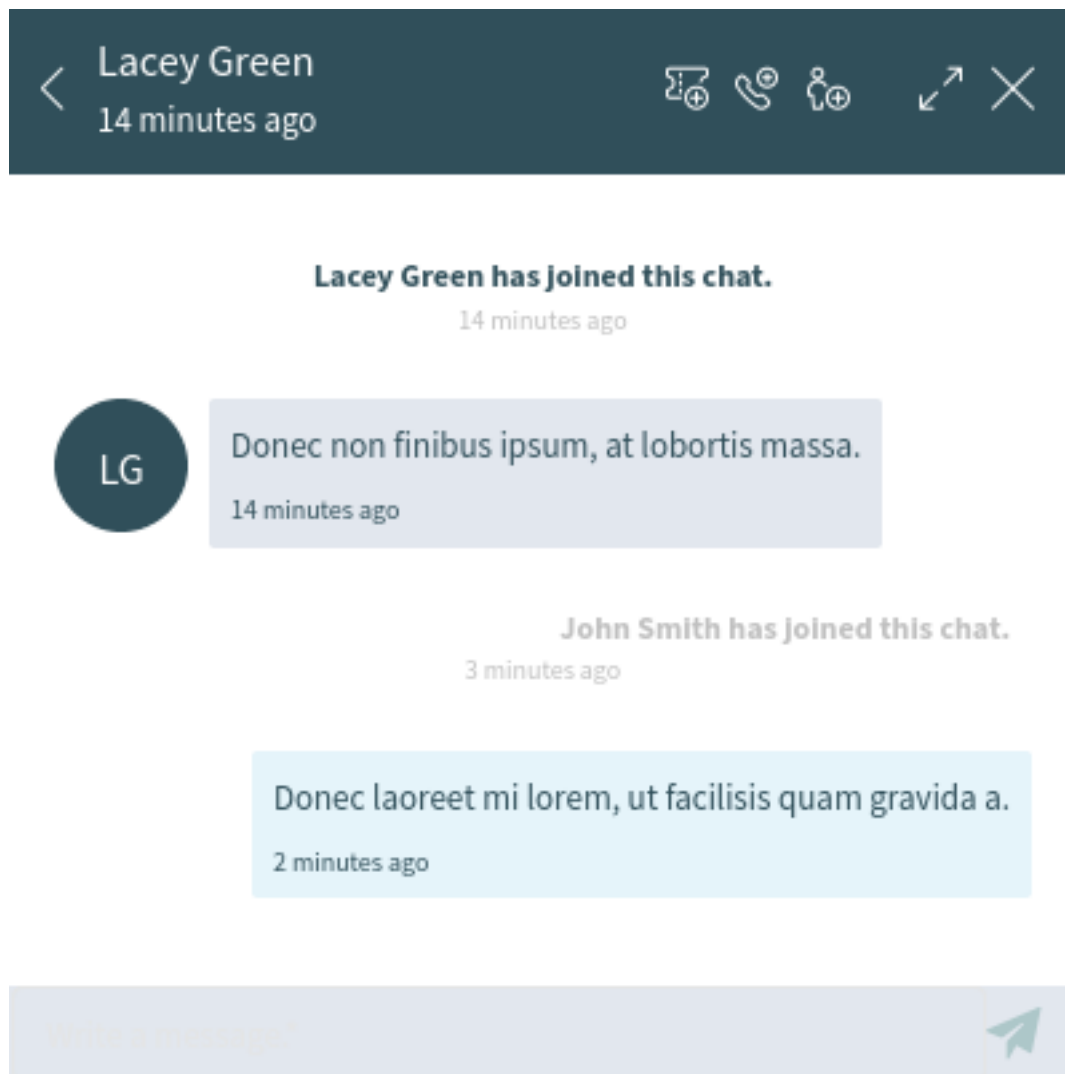


Fig. 150: Chat Widget

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.

Append to Ticket

Results (1 tickets)

Additional Filter

Customer user (exact match)

Owner

Please select your filter

Number	Title	Created	State	Queue
<input type="radio"/> 2015071510123456	Welcome to OTRS!	13 days ago	new	Raw

✓ Chat Protocol

Nunc eget ante gravida, sodales erat a, sollicitudin lectus.
08/08/2023 13:57:16

John Smith

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. 151: Append to Ticket

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.

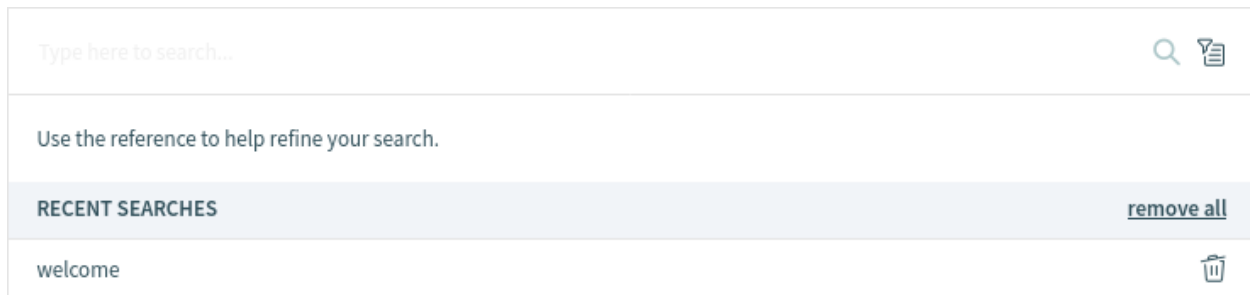
Invite

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.

1.15 Search

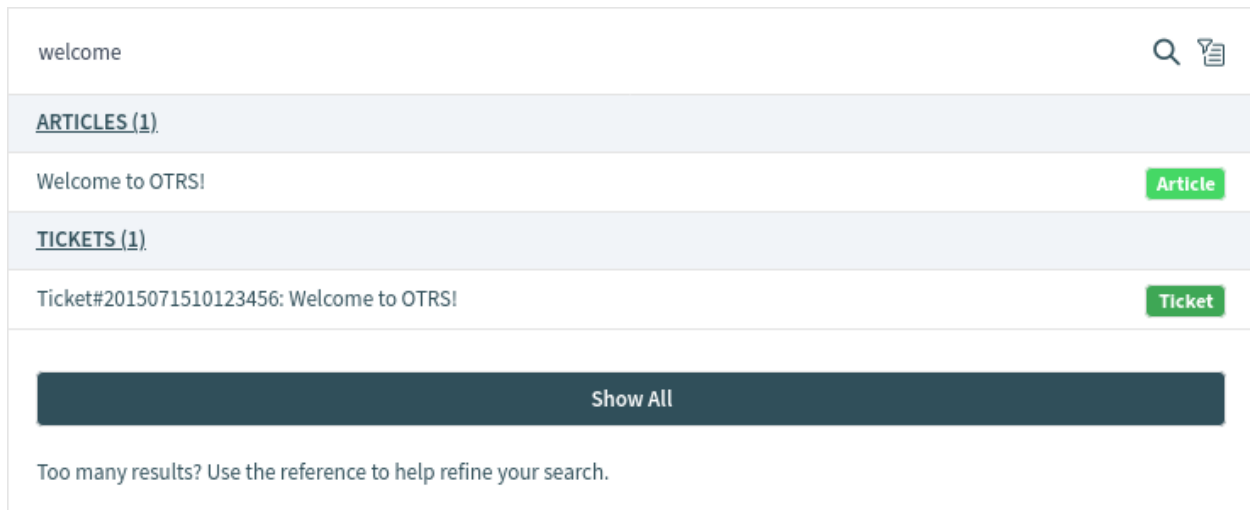
Use this menu item to search for something. The document search feature is available if you click on the magnification glass icon in the header bar.



The search dialog features a text input field at the top with the placeholder text "Type here to search...". To the right of the input field are two icons: a magnifying glass and a document with a checkmark. Below the input field is a line of text: "Use the reference to help refine your search." Underneath this is a section titled "RECENT SEARCHES" in all caps. To the right of this title is a link that says "remove all". Below the "RECENT SEARCHES" section, the word "welcome" is listed as a recent search term. To the right of "welcome" is a trash can icon.

Fig. 152: Search Dialog

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 search results preview screen shows the search term "welcome" in the input field at the top. Below the input field are two sections: "ARTICLES (1)" and "TICKETS (1)". Under "ARTICLES (1)", there is one result: "Welcome to OTRS!" with a green button labeled "Article" to its right. Under "TICKETS (1)", there is one result: "Ticket#2015071510123456: Welcome to OTRS!" with a green button labeled "Ticket" to its right. At the bottom of the results list is a dark blue button labeled "Show All". Below the "Show All" button is a line of text: "Too many results? Use the reference to help refine your search."

Fig. 153: Search Results Preview Screen

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.

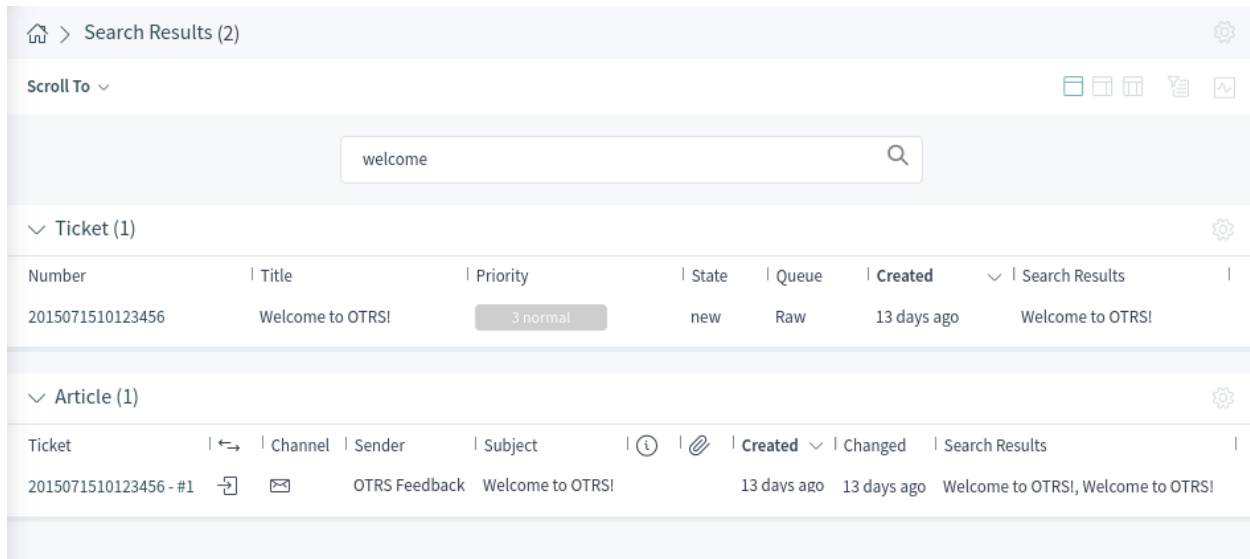


Fig. 154: Search Results Screen

This screen lists all objects that match the search term. The objects are grouped by type. Clicking on an entry opens the corresponding detail view of the business object.

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**.

Manage Search Preset

select preset

Insert preset name

Save

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)

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 misspellings. It can be specified as `quikc~1`.

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

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 `\(1\+1\)\'=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](#).

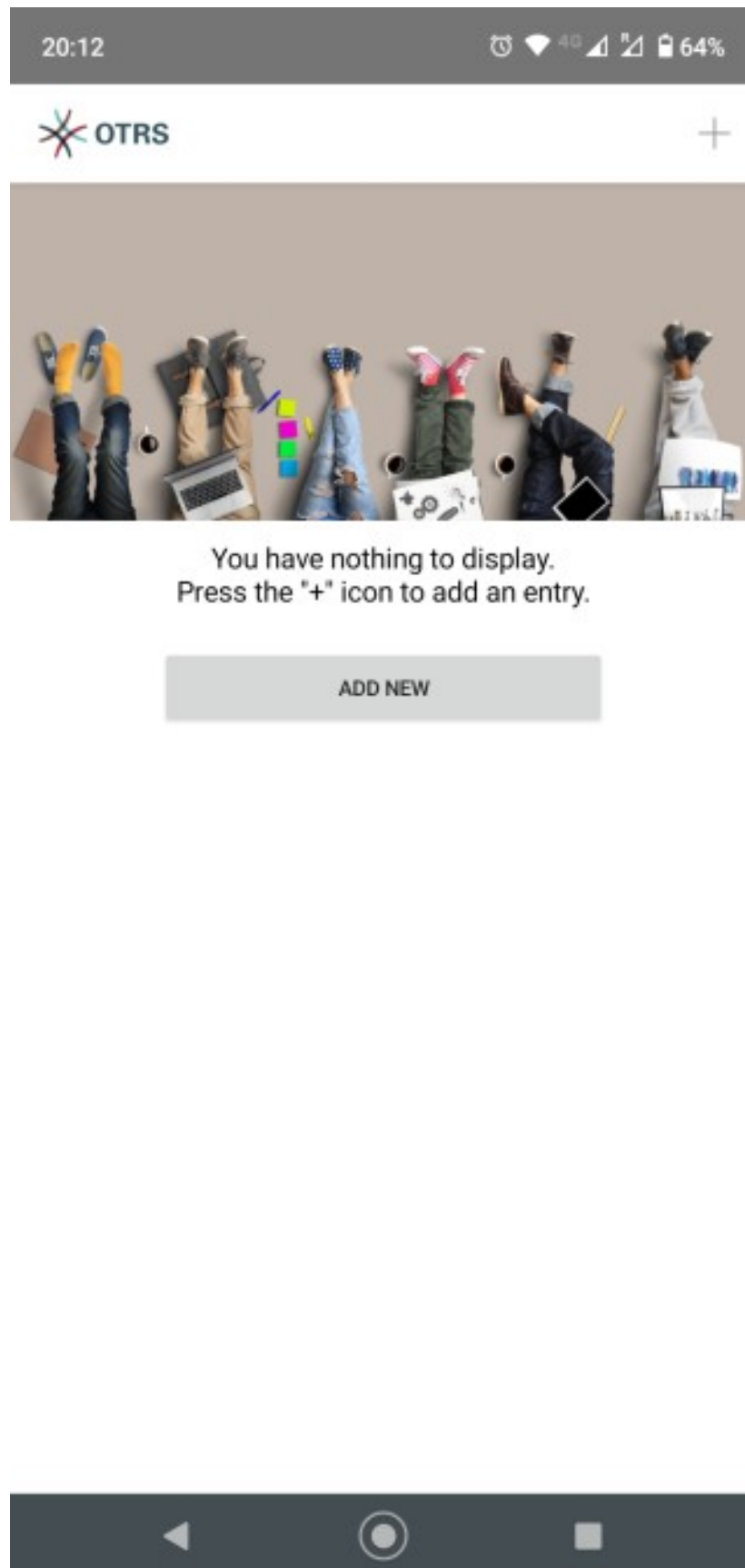
The usage of **OTRS** on a mobile device is the same as in the browser. This chapter only describes how to link the app with an OTRS account.

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.

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.

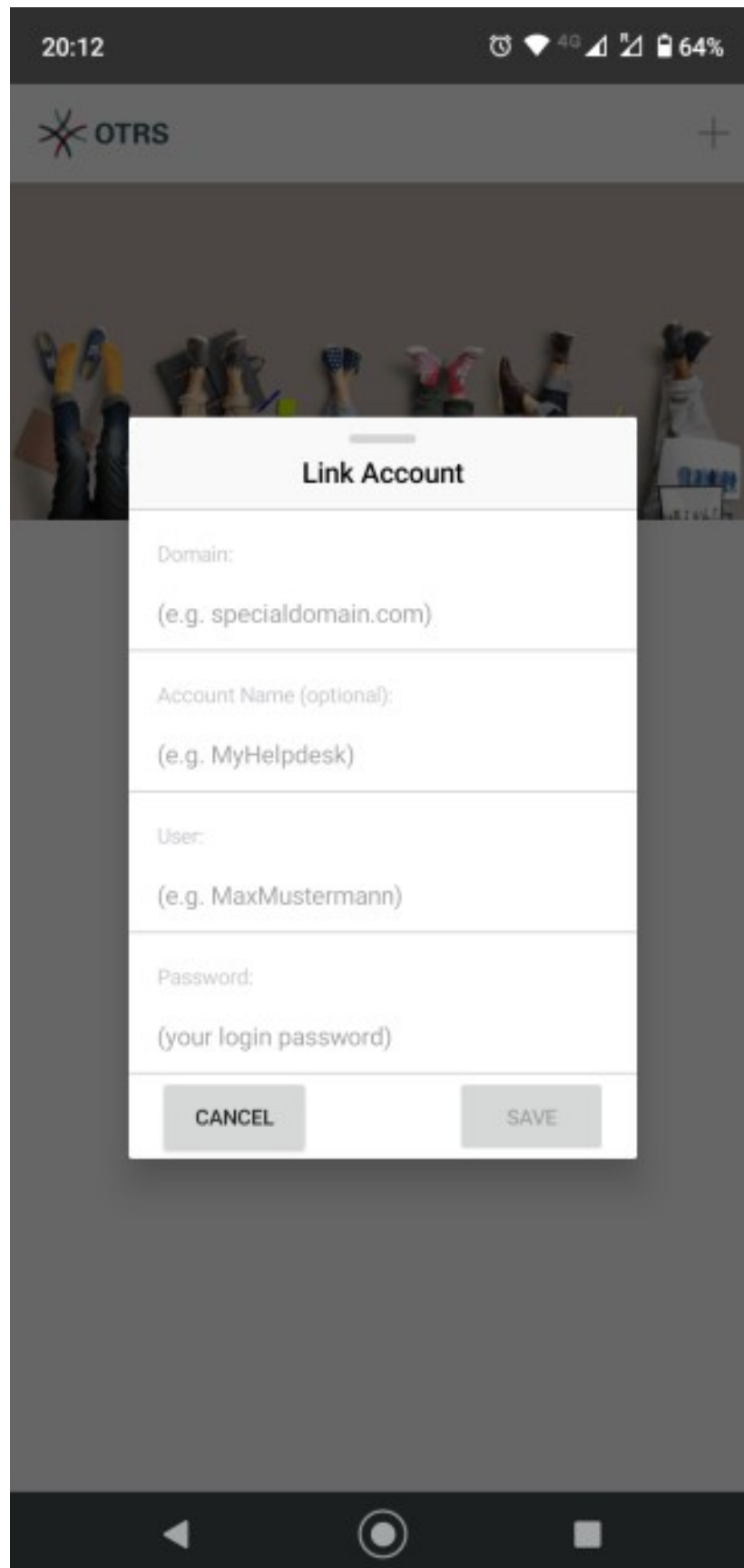


Fig. 157: Link Account Screen

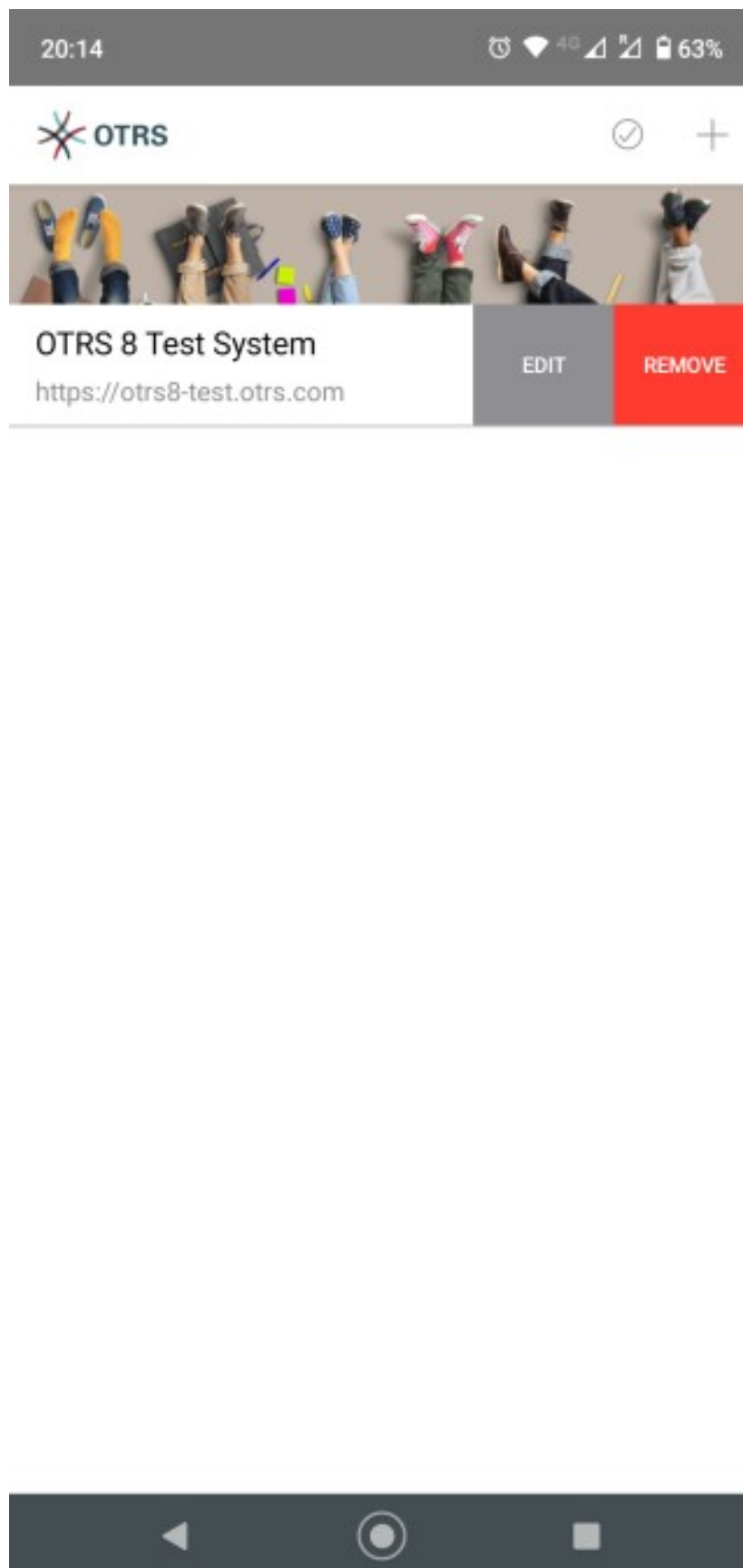


Fig. 158: Edit or Remove Account

Dashboard

Scroll To

Queue Metric

Queue	new	open	pending reminder	Total
Junk	13	0	0	13
Postmaster	14	0	0	14
Raw	17	0	0	17
Total	44	0	0	44

Escalations

Select Preset

Currently no data available.

Reminders

Select Preset

Currently no data available.

Unlocked (39)

Open

Number	Title	Priority
2023080710000018	Etiam viverra dig	3 normal
2023072610000412	Vestibulum preti	3 normal
2023072610000421	Nullam eget just	5 very hi

Fig. 159: Dashboard on a Mobile Device

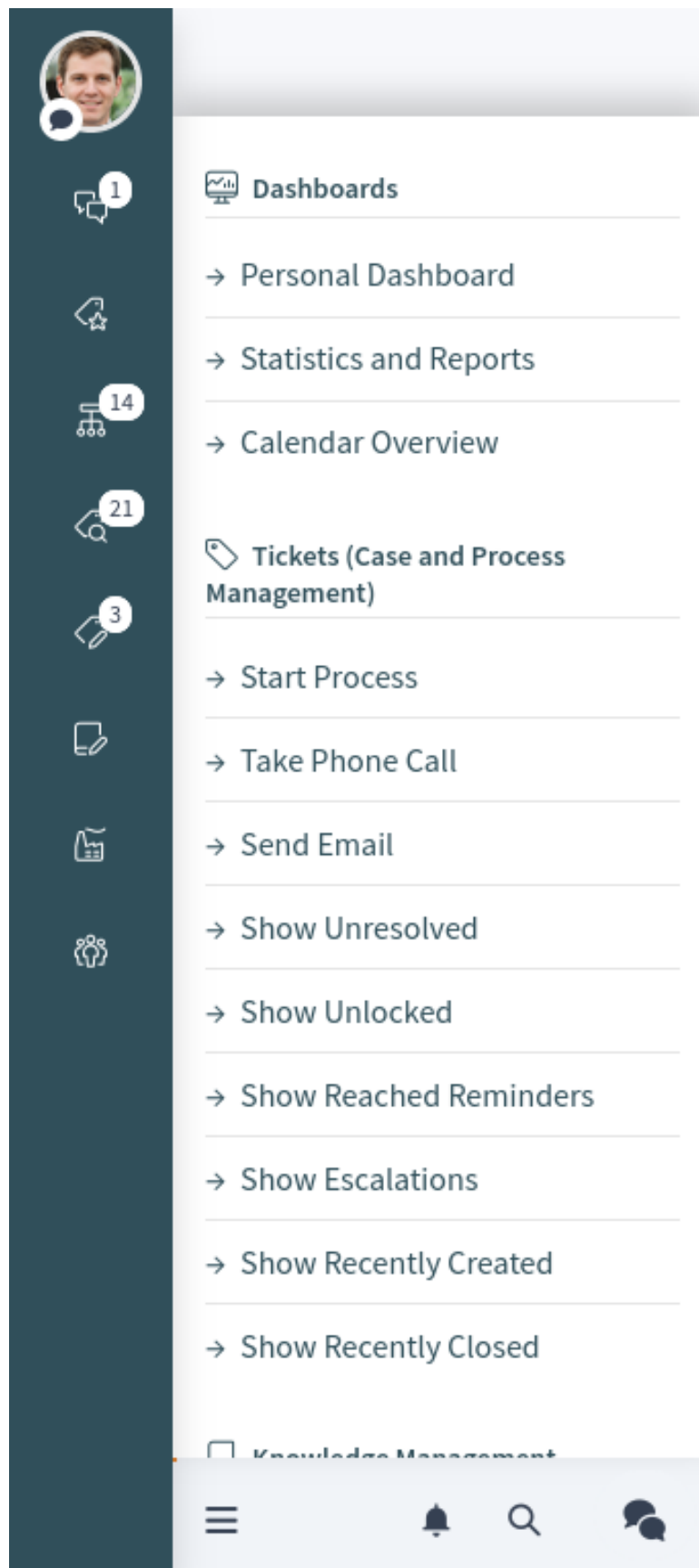


Fig. 160: Organizer Sidebar and Main Menu

Dashboard

Scroll To

Queue Metric

Queue	new	open	pending reminder	Total
Junk	13	0	0	13
Postmaster	14	0	0	14
Raw	17	0	0	17
Total	44	0	0	44

Escalations

Select Preset

Currently no data available.

Reminders

Select Preset

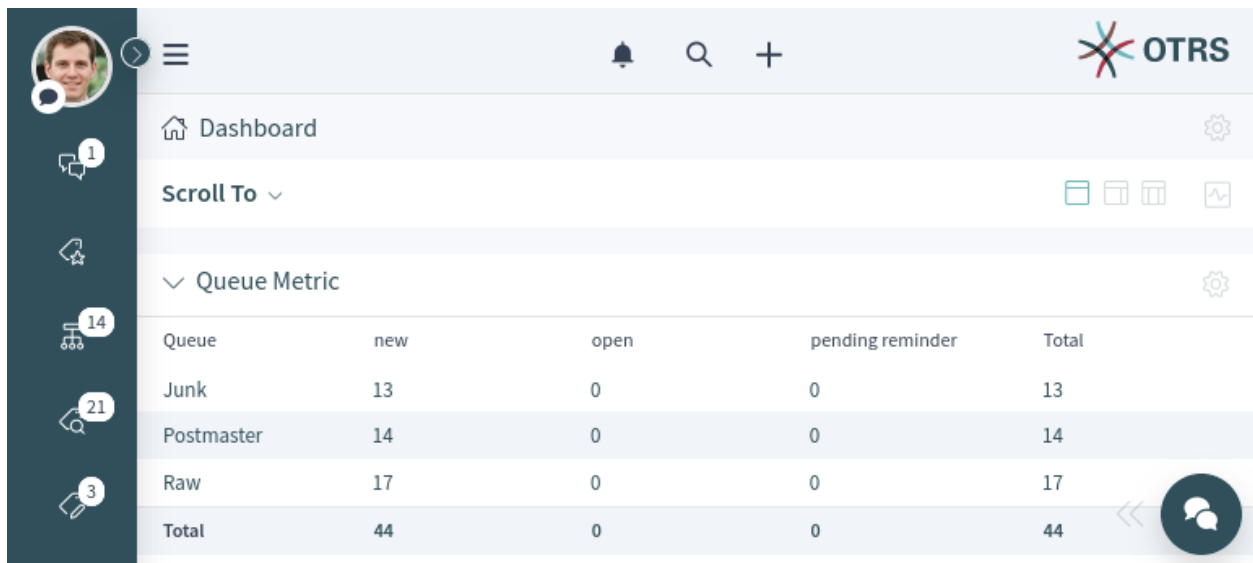
Currently no data available.

Unlocked (39)

Open

Number	Title	Priority
2023080710000018	Etiam viverra dig	3 normal
2023072610000412	Vestibulum preti	3 normal
2023072610000421	Nullam eget just	5 very hi

Fig. 161: Portrait Mode



The screenshot displays the OTRS Agent Interface in Landscape Mode. The interface features a dark sidebar on the left with navigation icons and a main content area. The top header includes the OTRS logo and navigation icons. The main content area shows a 'Queue Metric' table with columns for Queue, new, open, pending reminder, and Total. The table lists metrics for Queue, Junk, Postmaster, Raw, and Total. A chat icon is visible in the bottom right corner.

Queue	new	open	pending reminder	Total
Junk	13	0	0	13
Postmaster	14	0	0	14
Raw	17	0	0	17
Total	44	0	0	44

Fig. 162: Landscape Mode

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.

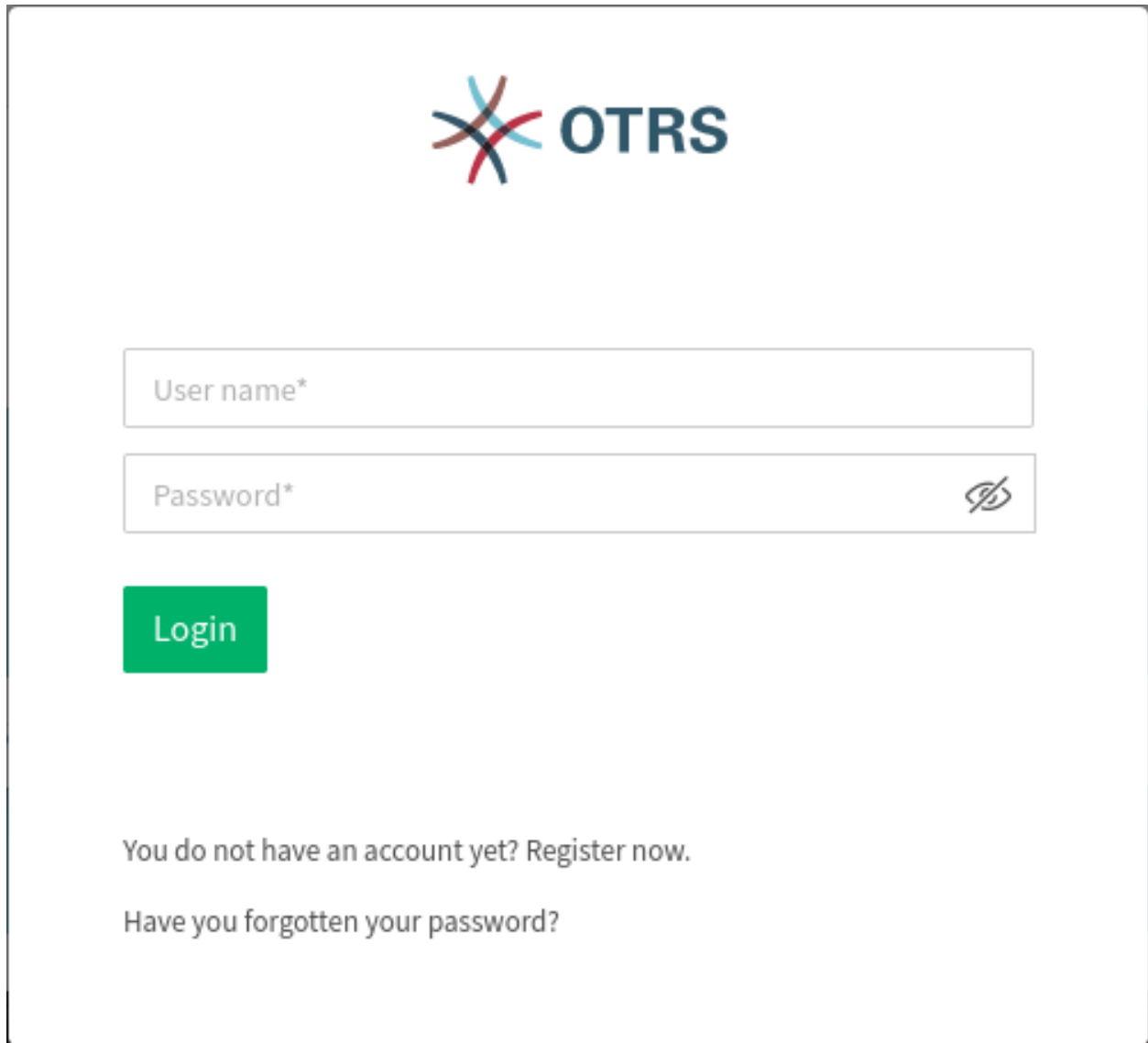
To create an account via the form:

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.



The image shows the OTRS login interface. At the top center is the OTRS logo, which consists of a stylized star-like icon made of four intersecting lines in red, blue, and green, followed by the text "OTRS" in a bold, dark blue sans-serif font. Below the logo are two input fields. The first field is labeled "User name*" and is a simple white rectangle with a thin grey border. The second field is labeled "Password*" and is also a white rectangle with a thin grey border. To the right of the password field is a small grey icon of an eye with a diagonal slash through it, indicating a toggle for password visibility. Below these fields is a green rectangular button with the word "Login" in white text. At the bottom of the form area, there are two lines of text: "You do not have an account yet? Register now." and "Have you forgotten your password?".

OTRS

User name*


Password* 

Login

You do not have an account yet? Register now.

Have you forgotten your password?

Fig. 1: Login



Create Account

This will become your username.

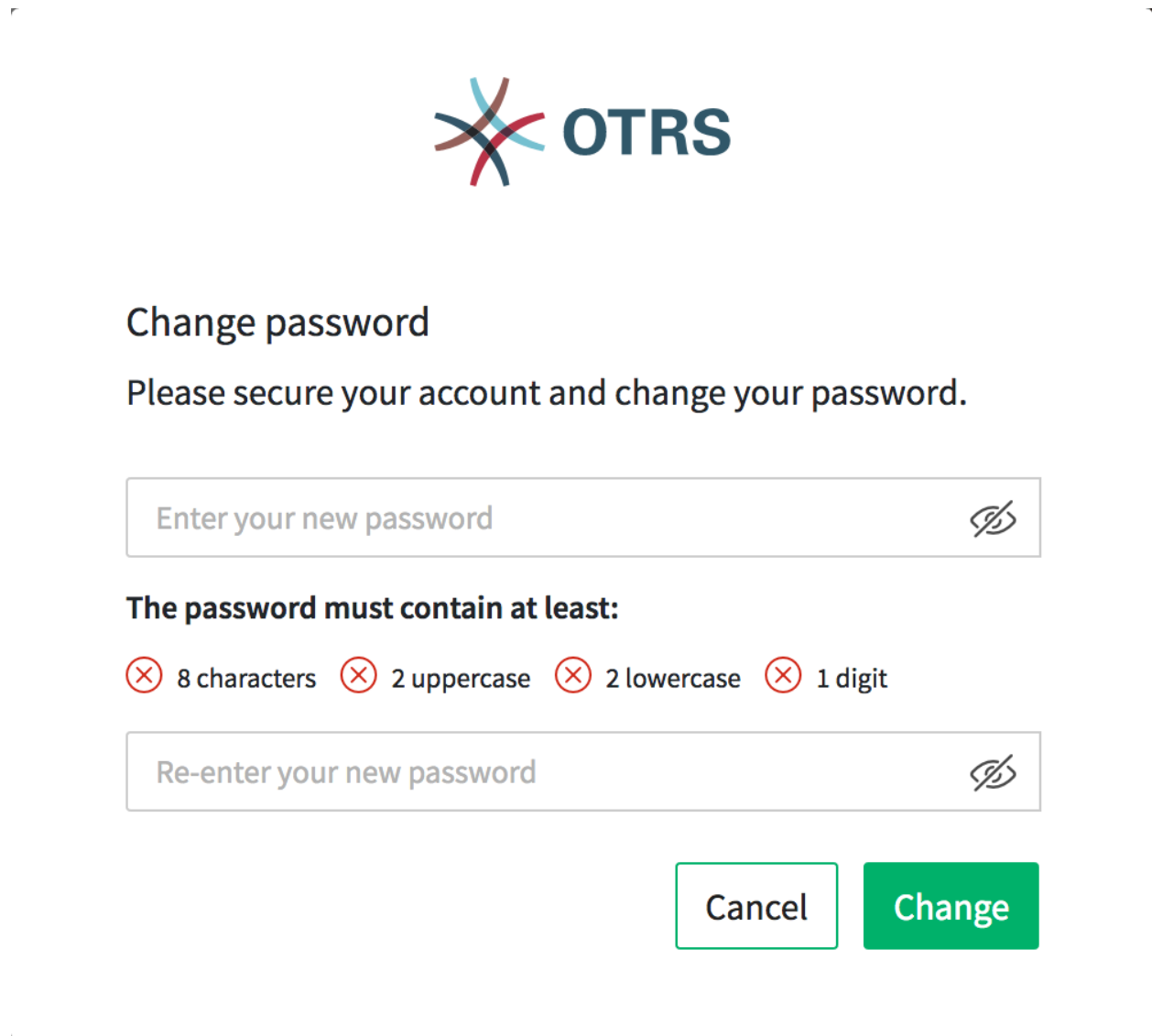
Register


You already have an account? [Log in instead.](#)

Fig. 2: Create Account

2. The email client opens with a pre-configured text.
3. Send the email.


2.1.3 Change Password










Change password

Please secure your account and change your password.

Enter your new password 

The password must contain at least:

 8 characters  2 uppercase  2 lowercase  1 digit

Re-enter your new password 

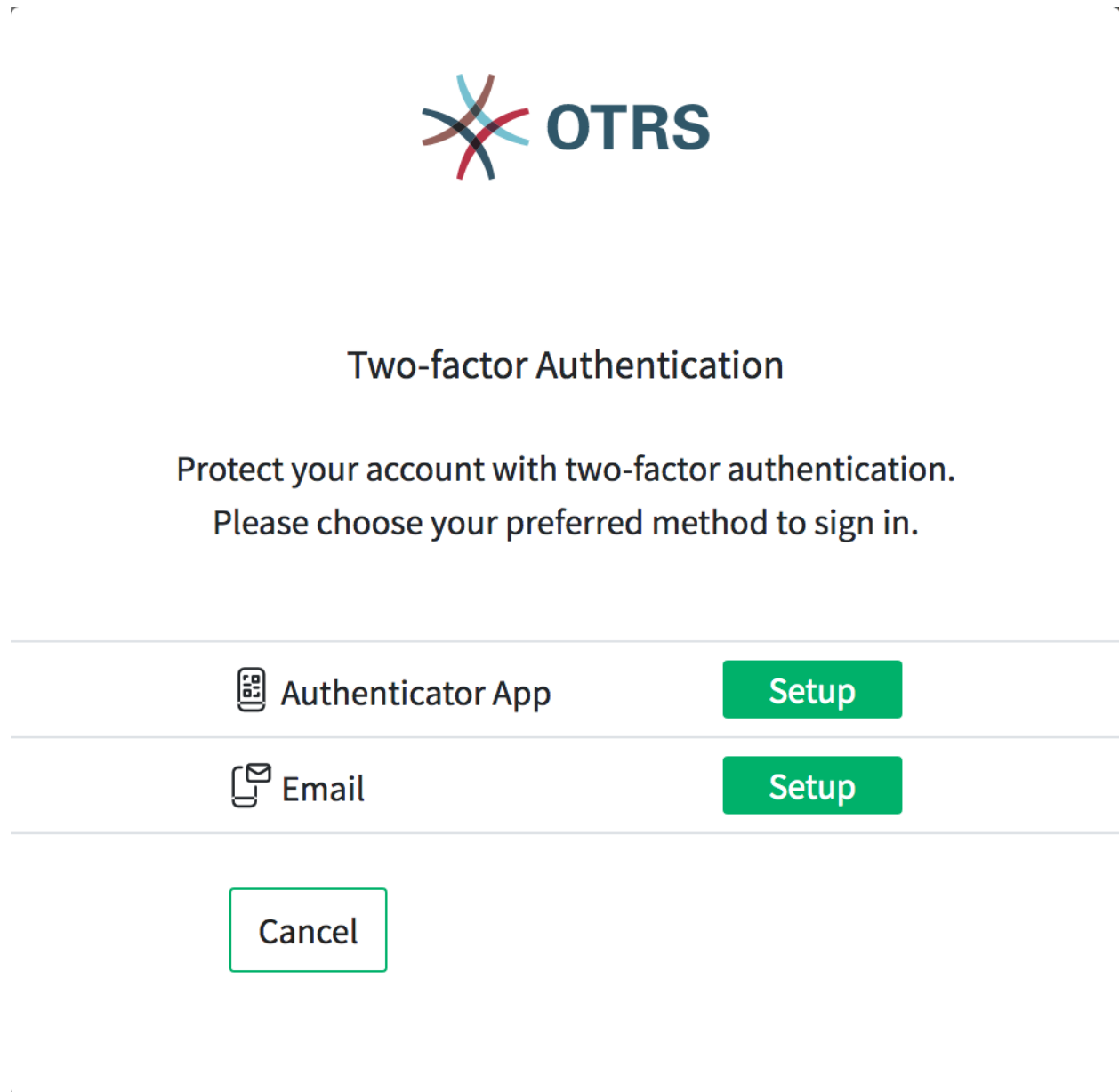
Cancel Change

Fig. 3: Change Password

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



The screenshot shows the OTRS Two-factor Authentication setup interface. At the top, the OTRS logo is displayed. Below it, the title "Two-factor Authentication" is centered. A message states: "Protect your account with two-factor authentication. Please choose your preferred method to sign in." There are two options listed: "Authenticator App" with a QR code icon and "Email" with an envelope icon. Each option has a green "Setup" button to its right. At the bottom, there is a "Cancel" button with a green border.

Fig. 4: Two-factor Authentication

1. Choose your preferred authentication method.
2. 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

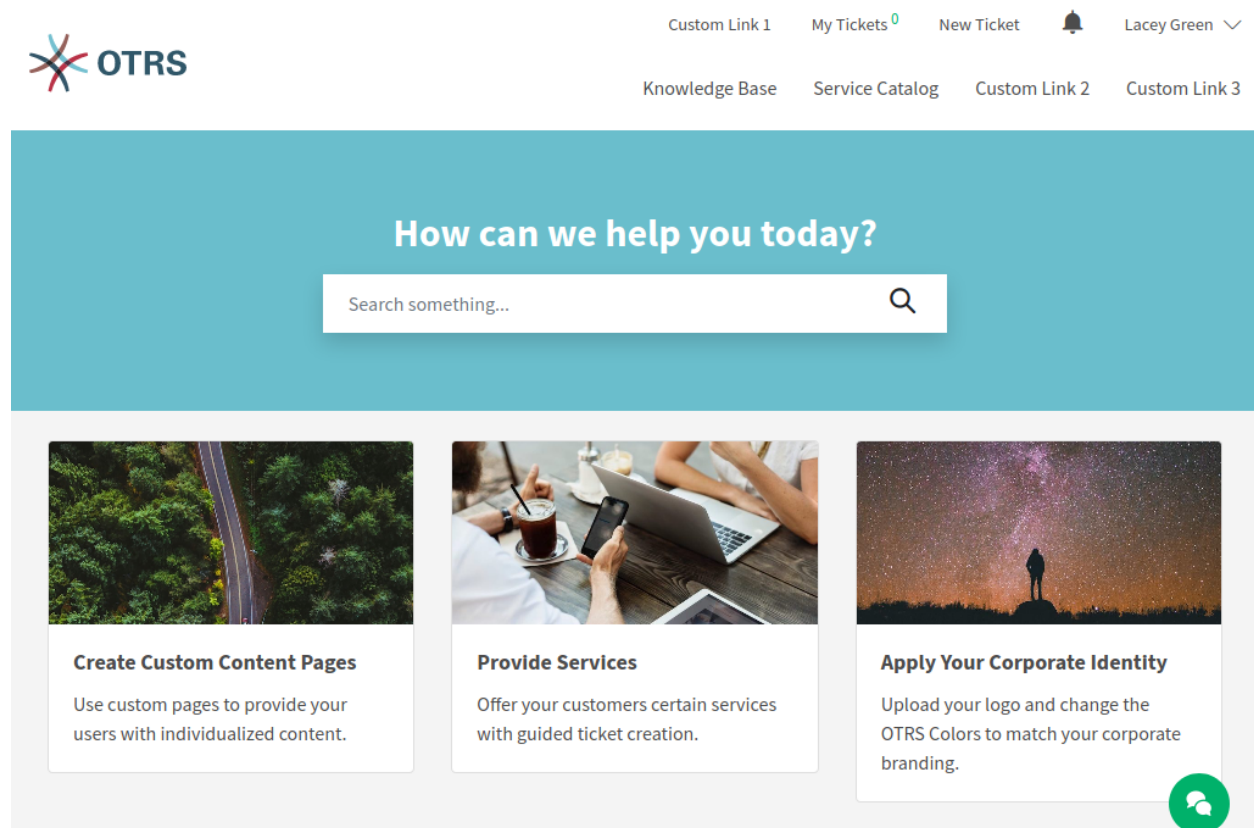


Fig. 5: Homepage for Logged in User

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

information.

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

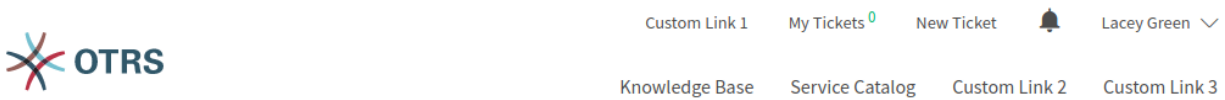


Fig. 6: Main Navigation

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

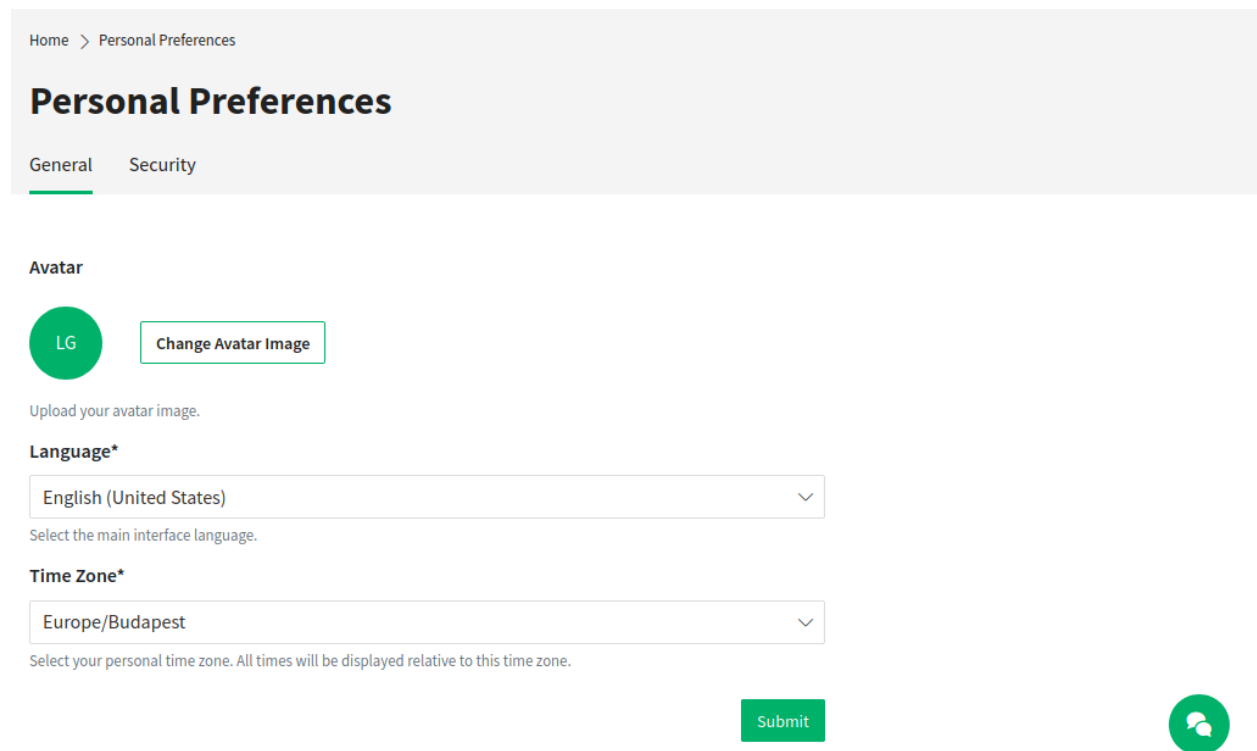
These links can be used to guide users to [Custom Pages](#).

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



The screenshot shows the 'Personal Preferences' screen with the 'General' tab selected. At the top, there is a breadcrumb 'Home > Personal Preferences' and the title 'Personal Preferences'. Below the title are two tabs: 'General' (active) and 'Security'. The 'Avatar' section features a green circular profile picture with the initials 'LG' and a 'Change Avatar Image' button. Below this is the instruction 'Upload your avatar image.' The 'Language*' section has a dropdown menu set to 'English (United States)' with the instruction 'Select the main interface language.' The 'Time Zone*' section has a dropdown menu set to 'Europe/Budapest' with the instruction 'Select your personal time zone. All times will be displayed relative to this time zone.' At the bottom right, there is a green 'Submit' button and a green circular icon with a white speech bubble.

Fig. 7: Personal Preferences - General

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.


Home > Personal Preferences

Personal Preferences


General **Security**

Change Password

Current password 



Enter your new password 


The password must contain at least:

Re-enter your new password 

Set a new password by filling in your current password and a new one.

Two-factor Authentication

 Authenticator App	Setup
 Email	Setup

Revoke all trusted devices 

Submit




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.

Home > New Ticket

Create New Ticket

Ticket Process Ticket

Subject*

Please insert a title for the ticket.

Message*

Format Font Size A A^x I_x Ω ¶ ¶ ¶

Attachments

Drop files here or click to select files

Create Ticket

Fig. 9: Create New 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

After selecting a service, there is a lookup for configured queues for this service. If there are configured queues for the selected service, only those will be available in the queue selection. If there are no queues configured for the selected service, all queues will be displayed.

It is possible to add a filter button next to the queue selection. After clicking this button all available queues get restored to the queue selection field and can be selected. This feature can be enabled in the system configuration.

Configured ACLs affect the displayed queues as usual.

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.

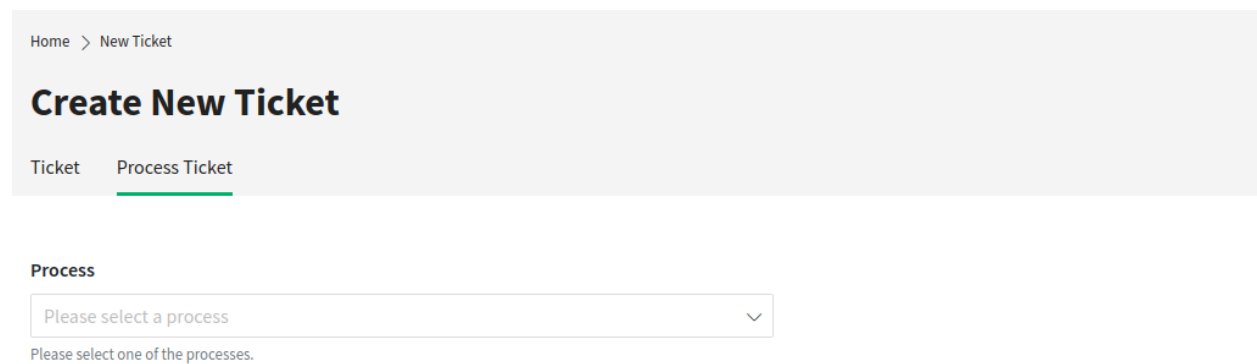


Fig. 10: Create Process Ticket

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*.

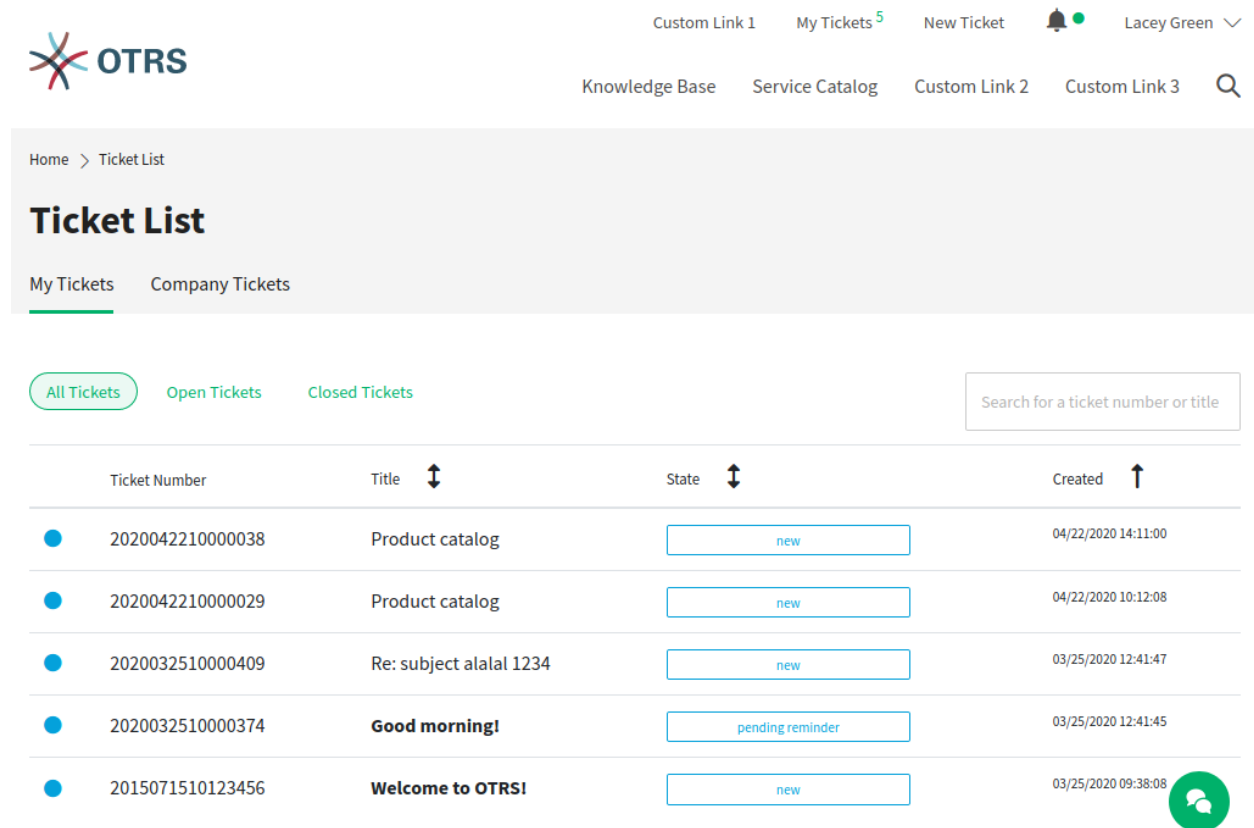
Note: The color can be different if a corporate design is applied to the external interface by the administrator.

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.



The screenshot shows the OTRS user interface. At the top, there is a navigation bar with links for 'Custom Link 1', 'My Tickets' (with a notification badge showing 5), 'New Ticket', and a user profile for 'Lacey Green'. Below this is a secondary navigation bar with 'Knowledge Base', 'Service Catalog', 'Custom Link 2', 'Custom Link 3', and a search icon. The main content area has a breadcrumb 'Home > Ticket List' and a title 'Ticket List'. There are two tabs: 'My Tickets' (active) and 'Company Tickets'. Below the tabs are three filter buttons: 'All Tickets' (selected), 'Open Tickets', and 'Closed Tickets'. A search box on the right says 'Search for a ticket number or title'. The main table displays a list of tickets with columns for 'Ticket Number', 'Title', 'State', and 'Created'. The table contains five rows of ticket data. A green chat bubble icon is visible in the bottom right corner of the table area.

Ticket Number	Title	State	Created
2020042210000038	Product catalog	new	04/22/2020 14:11:00
2020042210000029	Product catalog	new	04/22/2020 10:12:08
2020032510000409	Re: subject alalal 1234	new	03/25/2020 12:41:47
2020032510000374	Good morning!	pending reminder	03/25/2020 12:41:45
2015071510123456	Welcome to OTRS!	new	03/25/2020 09:38:08

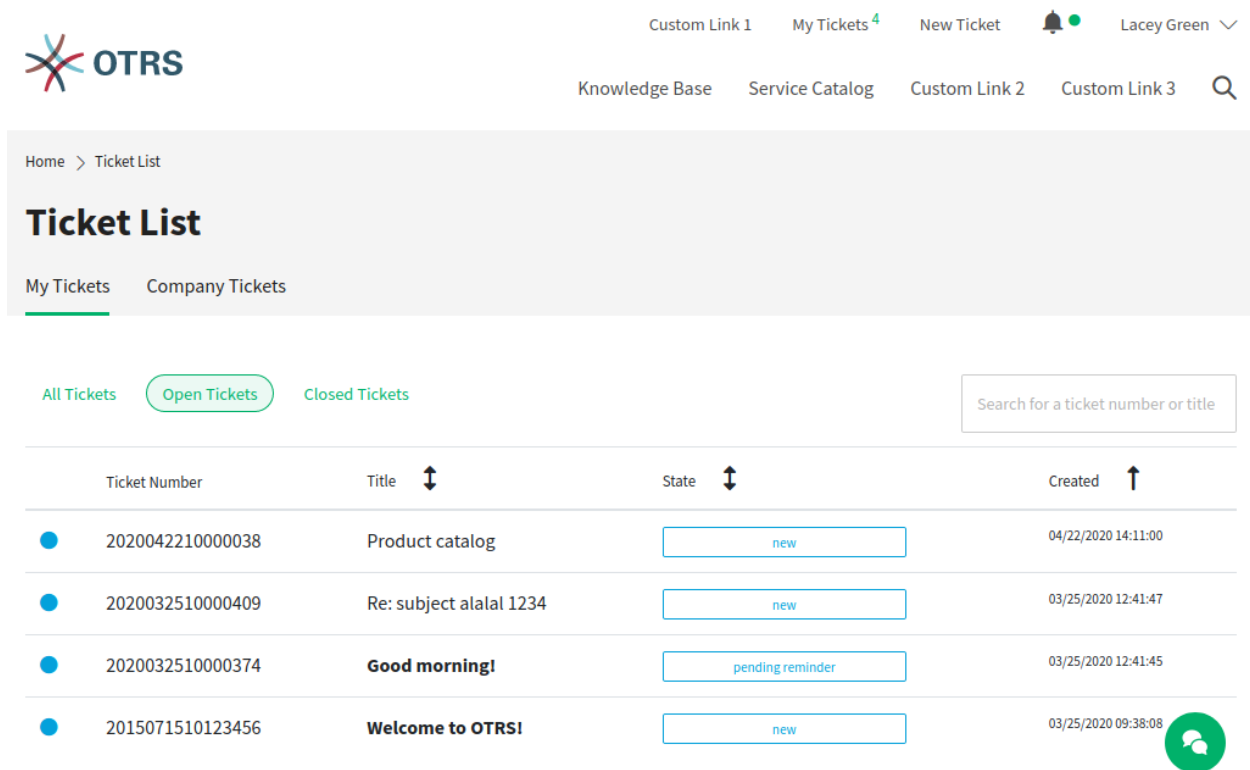
Fig. 11: My Tickets - All Tickets

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

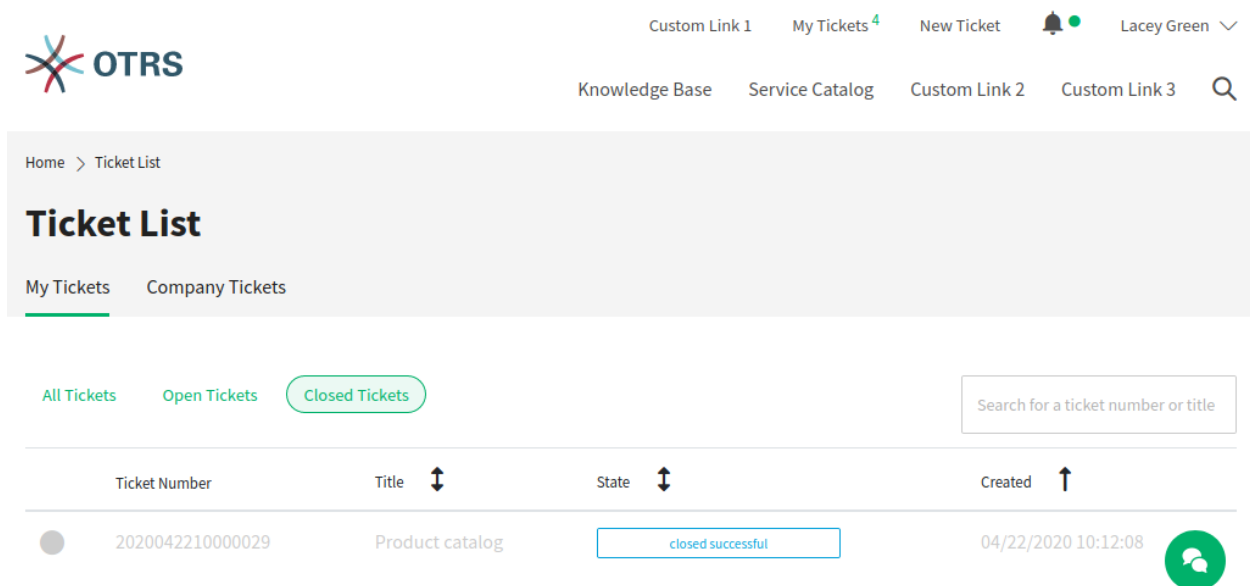
This view shows all tickets of the currently logged in customer user that are in *Closed* status.



The screenshot shows the OTRS Ticket List interface. At the top, there is a navigation bar with the OTRS logo, a user profile for 'Lacey Green', and several links: 'Custom Link 1', 'My Tickets' (with a notification badge), 'New Ticket', 'Knowledge Base', 'Service Catalog', 'Custom Link 2', and 'Custom Link 3'. Below the navigation bar, the breadcrumb 'Home > Ticket List' is visible. The main heading is 'Ticket List', with sub-tabs for 'My Tickets' (selected) and 'Company Tickets'. There are three filter buttons: 'All Tickets', 'Open Tickets' (highlighted with a green border), and 'Closed Tickets'. A search box on the right prompts 'Search for a ticket number or title'. The table below lists four tickets, all with a state of 'new' or 'pending reminder'. The first ticket is 'Product catalog' (2020042210000038), the second is 'Re: subject alalal 1234' (2020032510000409), the third is 'Good morning!' (2020032510000374), and the fourth is 'Welcome to OTRS!' (2015071510123456). A green circular icon with a speech bubble is in the bottom right corner.

Ticket Number	Title	State	Created
2020042210000038	Product catalog	new	04/22/2020 14:11:00
2020032510000409	Re: subject alalal 1234	new	03/25/2020 12:41:47
2020032510000374	Good morning!	pending reminder	03/25/2020 12:41:45
2015071510123456	Welcome to OTRS!	new	03/25/2020 09:38:08

Fig. 12: My Tickets - Open Tickets



The screenshot shows the OTRS Ticket List interface with the 'Closed Tickets' filter selected. The navigation bar and breadcrumb are the same as in Fig. 12. The sub-tab 'My Tickets' is still selected. The filter buttons are 'All Tickets', 'Open Tickets', and 'Closed Tickets' (highlighted with a green border). The search box is the same. The table below lists one ticket with a state of 'closed successful'. The ticket is 'Product catalog' (2020042210000029), created on '04/22/2020 10:12:08'. A green circular icon with a speech bubble is in the bottom right corner.

Ticket Number	Title	State	Created
2020042210000029	Product catalog	closed successful	04/22/2020 10:12:08

Fig. 13: My Tickets - Closed Tickets

2.6.2 Customer Dynamic Field

If a dynamic field of type *Customer* contains the customer user who is logged in to the external interface, the *Ticket List* screen is extended with a new menu item. This menu item lists the tickets, where the customer user is added as dynamic field. The label of this menu item will be the label of the dynamic field.

The screenshot shows the 'Ticket List' interface. At the top, there is a breadcrumb 'Home > Ticket List'. Below it, the title 'Ticket List' is displayed. There are three tabs: 'My Tickets', 'Relevant Tickets' (which is active and underlined), and 'Company Tickets'. Below the tabs, there are three buttons: 'All Tickets', 'Open Tickets' (which is highlighted with a green border), and 'Closed Tickets'. To the right of these buttons is an 'Export Ticket List' button with a download icon. Further right is a search bar with the placeholder text 'Search for a ticket number or t'. Below these elements is a table with the following columns: 'Ticket Number', 'Title', 'State', and 'Created'. The table contains one row with the following data: Ticket Number '2021061510000028', Title 'Important Changes', State 'open' (in a blue box), and Created '06/15/2021 14:22:22'. There is a blue dot icon to the left of the first row.

Fig. 14: Custom Contact Ticket List

This feature allows you to list tickets for customer users that they do not otherwise have access to. The customer users can be added to any ticket as dynamic field, even if they are not the customer user of the ticket.

See also:

To display the dynamic field of type *Customer* in the external interface, see the [Dynamic Fields](#) chapter of the administration manual.

The functionality is by default limited to search just contacts that are from the same company. Otherwise all contacts of all companies would be visible to every customer user that has access to the external interface.

If you want to make all contacts searchable by every customer user, you can enable this by removing the tick from the system configuration option `CustomContactFieldsRestrictContactsToCustomerOnly` and setting it as not enabled.

2.6.3 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.

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.

The ticket detail view can show linked tickets and knowledge base articles in the right sidebar. Linked tickets are displayed if they have the same customer user and linked knowledge base articles are displayed only if they are visible to customers or public. Clicking on a ticket or knowledge base article will lead you to the linked ticket or knowledge base article.

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.

Product catalog



Product catalog

Can you please send me the product catalog?

Created: 04/22/2020 14:11



Subject*

Re: Product catalog

Subject for a new article.

Message*

Please enter a message for the new article.

Attachments

Drop files here or click to select files

[Respond to This Ticket](#) Print Ticket 

State
new

Ticket Number
2020042210000038

Queue
Raw

Priority
3 normal

Fig. 15: Ticket Detail View

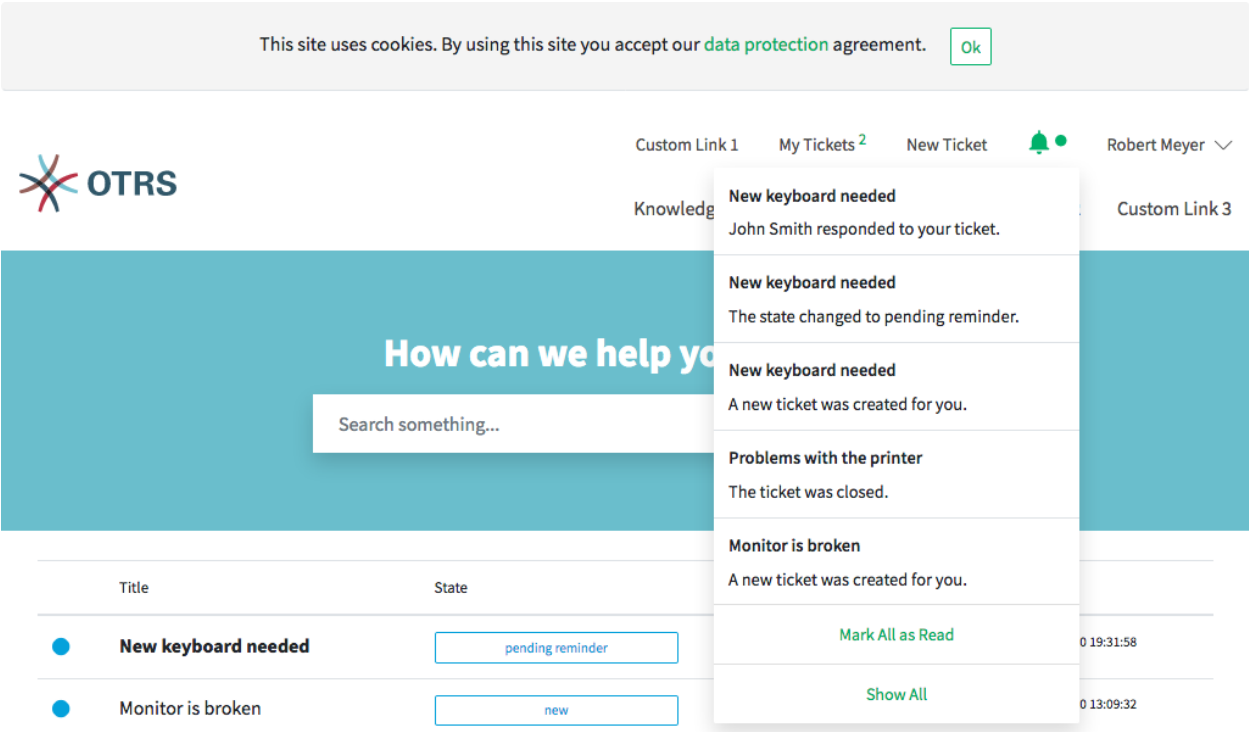


Fig. 16: Notification Screen on Hover

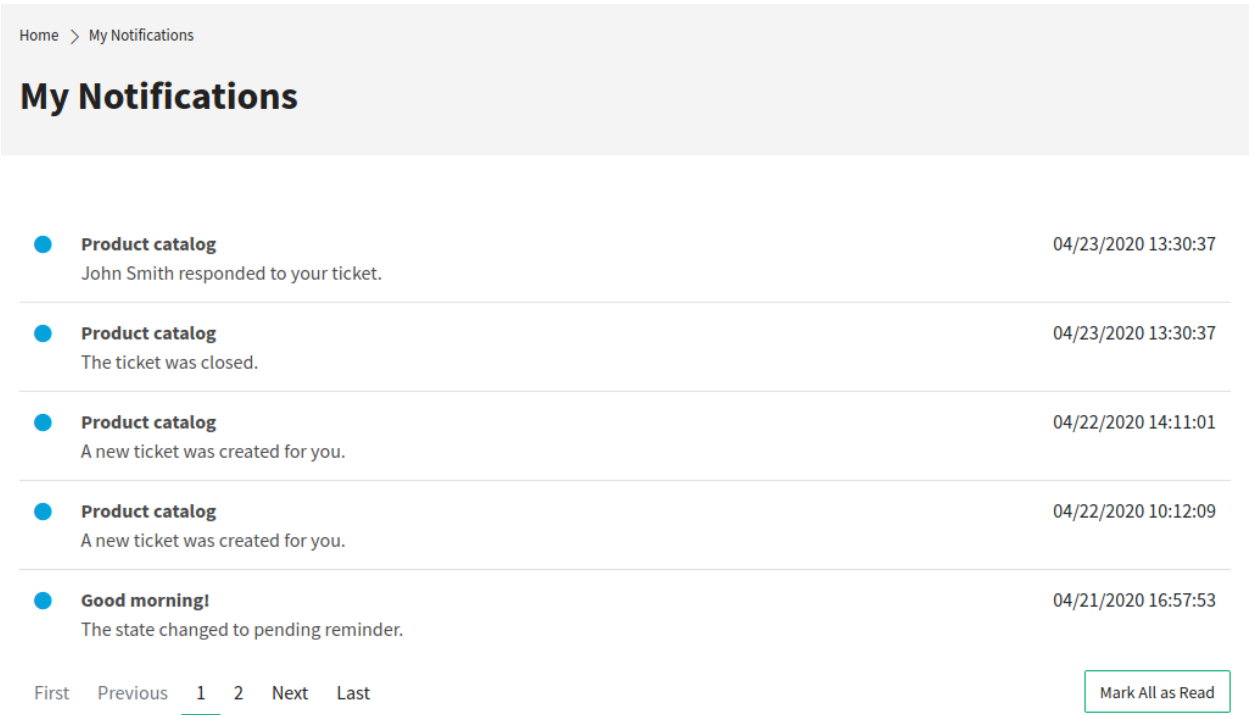


Fig. 17: My Notifications

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.

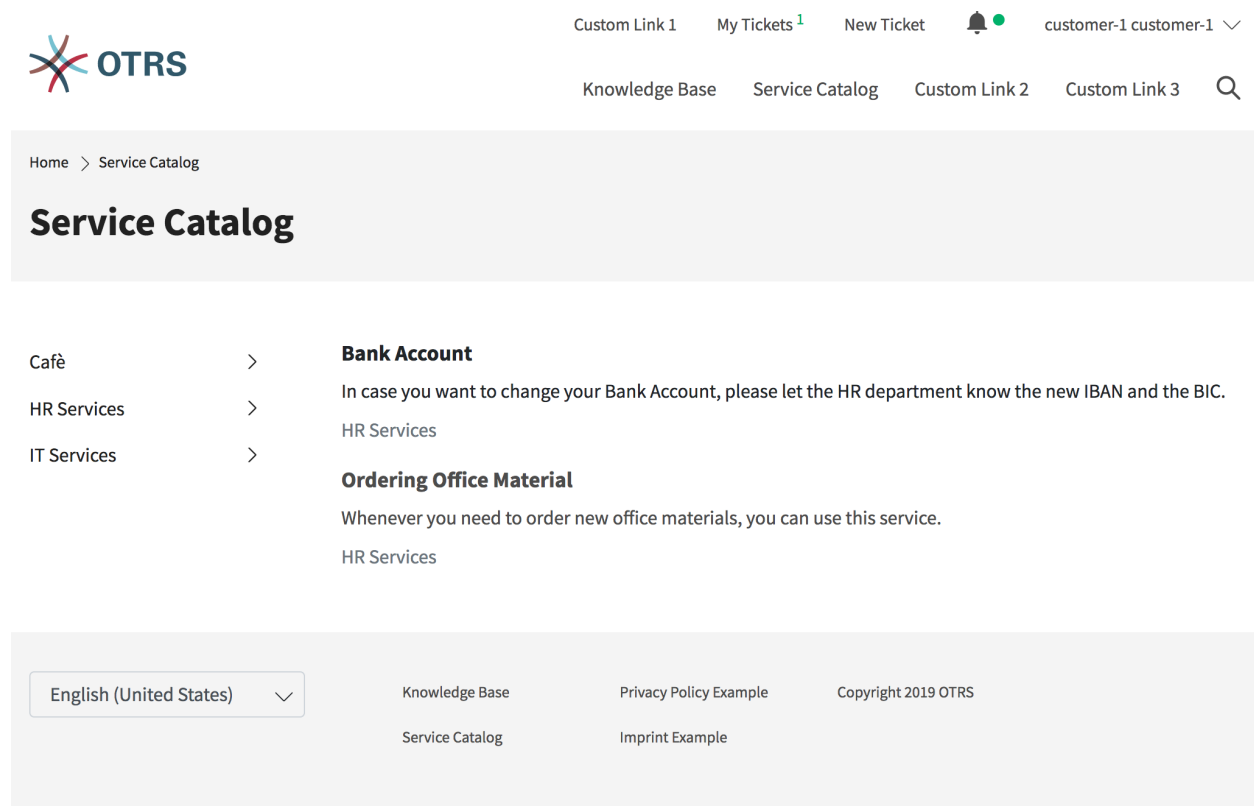


Fig. 18: Service Catalog

If subcategories are defined within a category, the subcategories are shown if the customer user hovers over a category.

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.

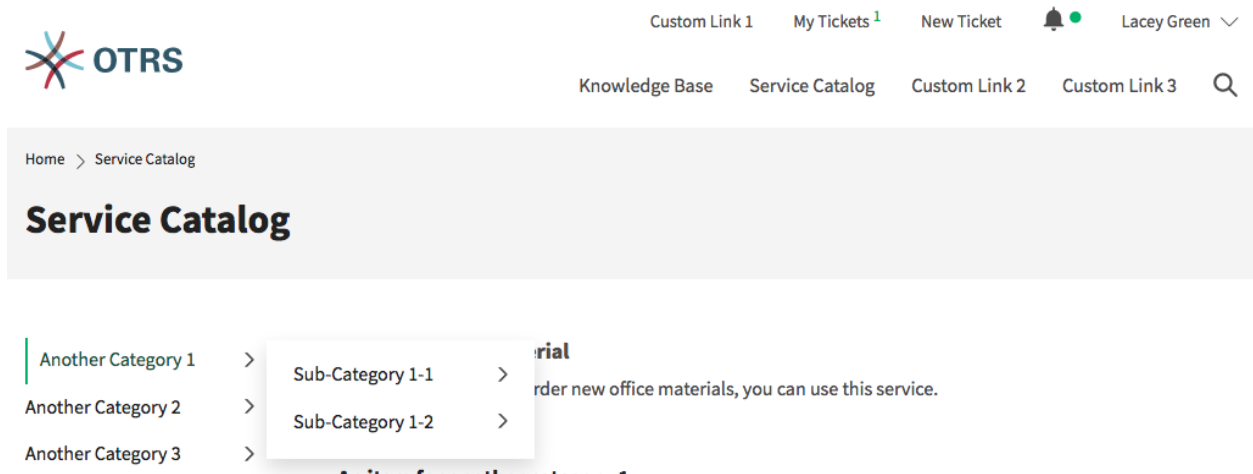


Fig. 19: Catalog with Subcategories

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
- 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.

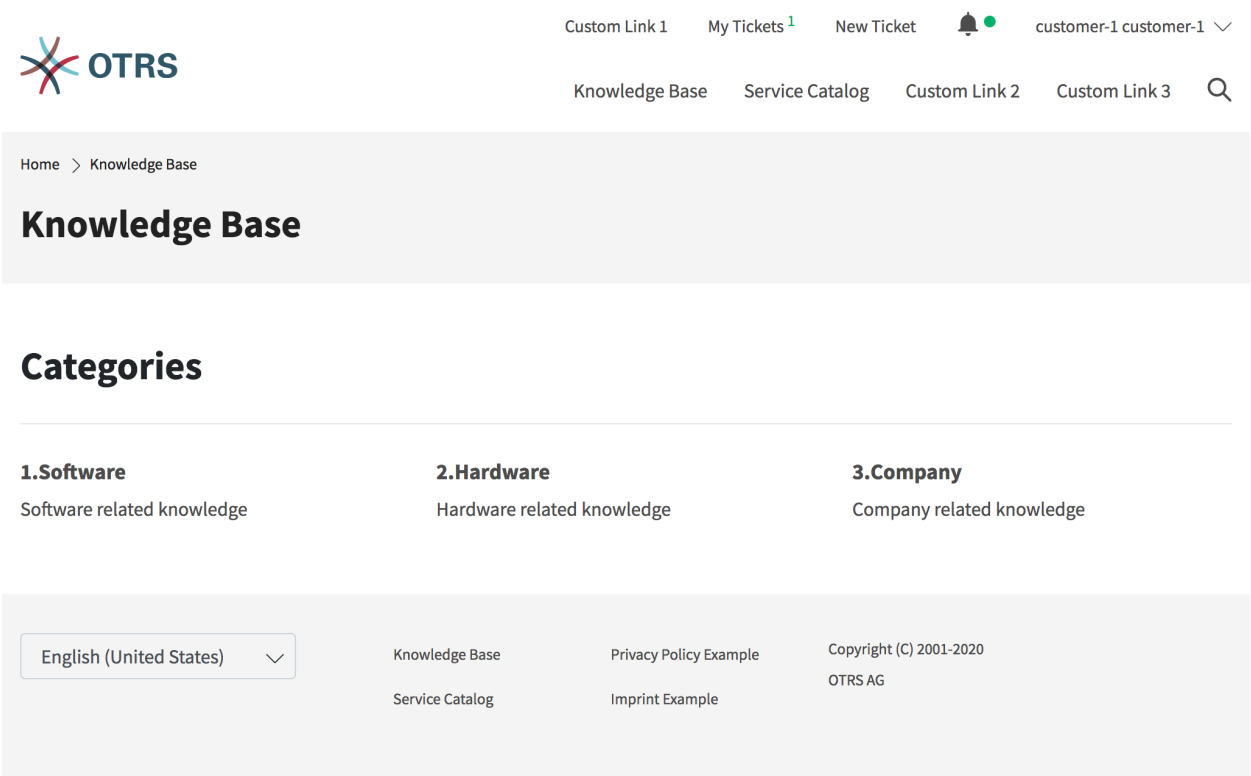


Fig. 20: Knowledge Base Categories

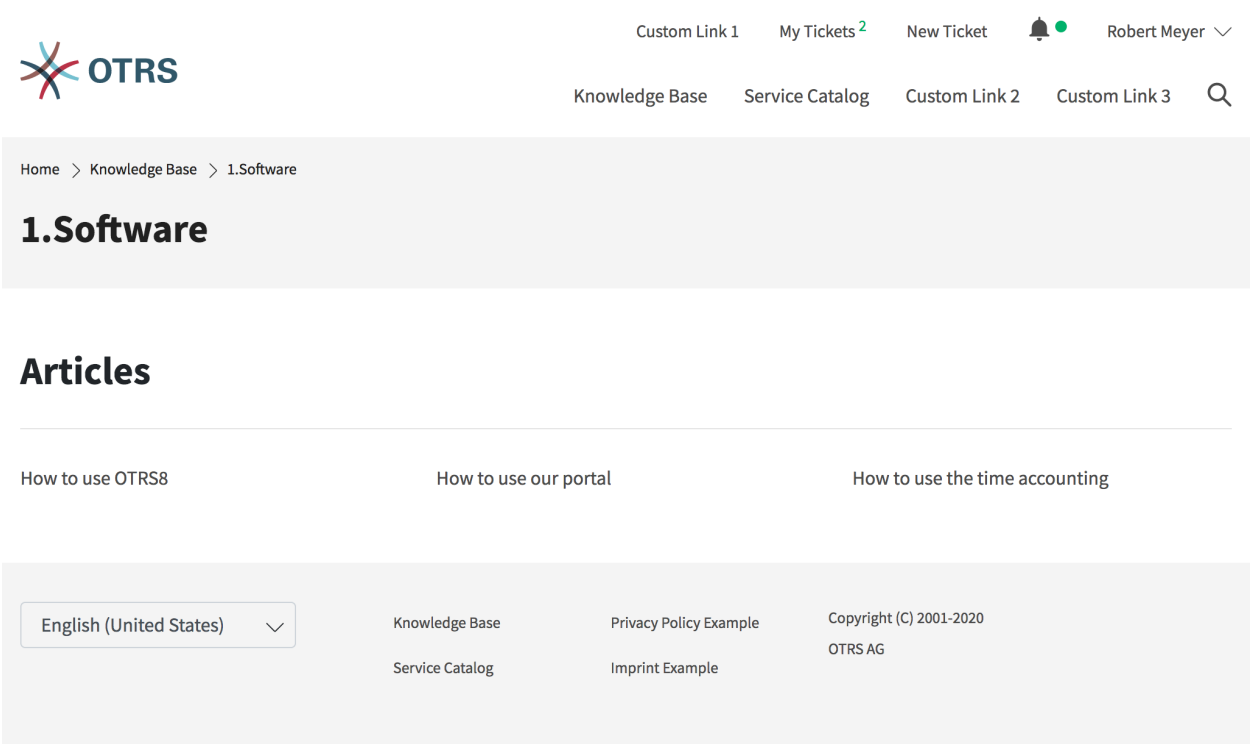


Fig. 21: Knowledge Base Article

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.

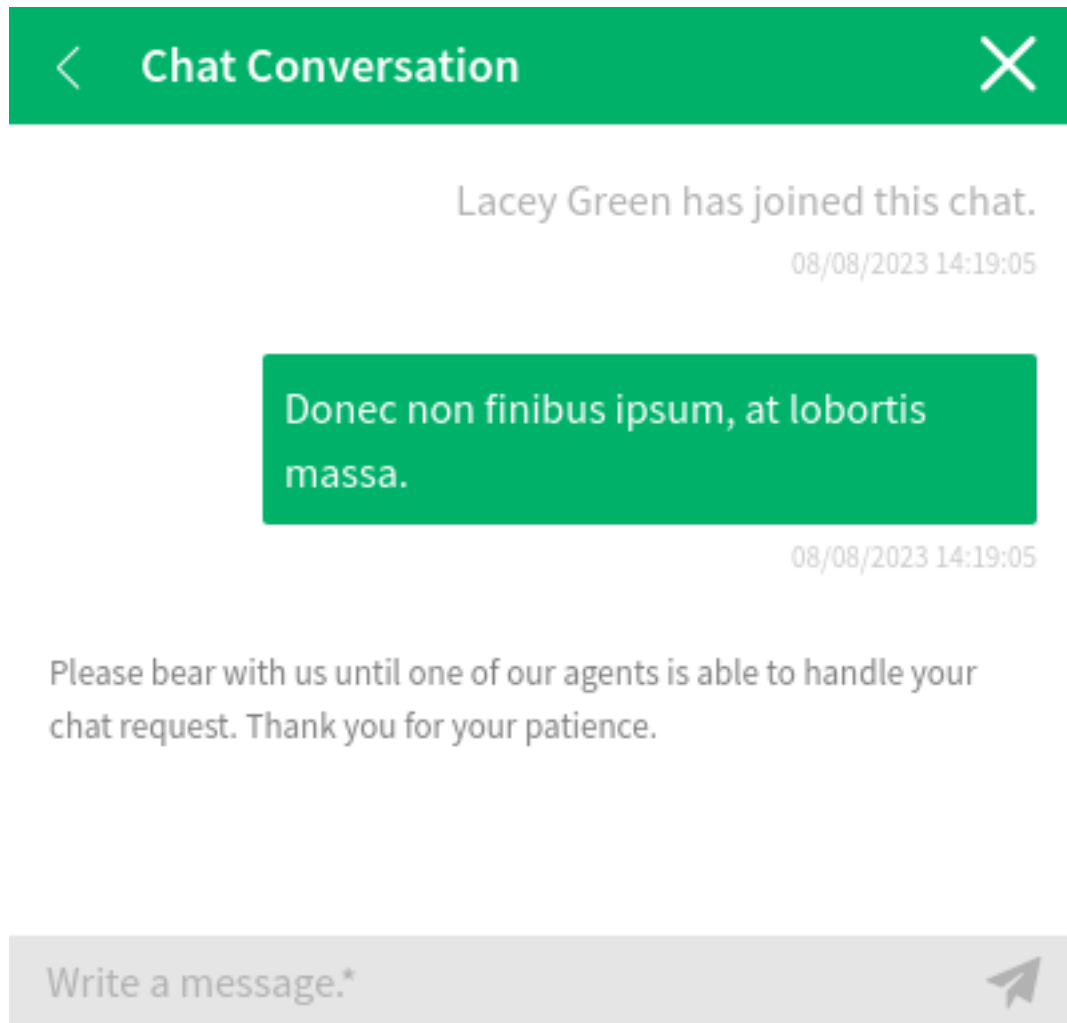


Fig. 22: Start Chat Window

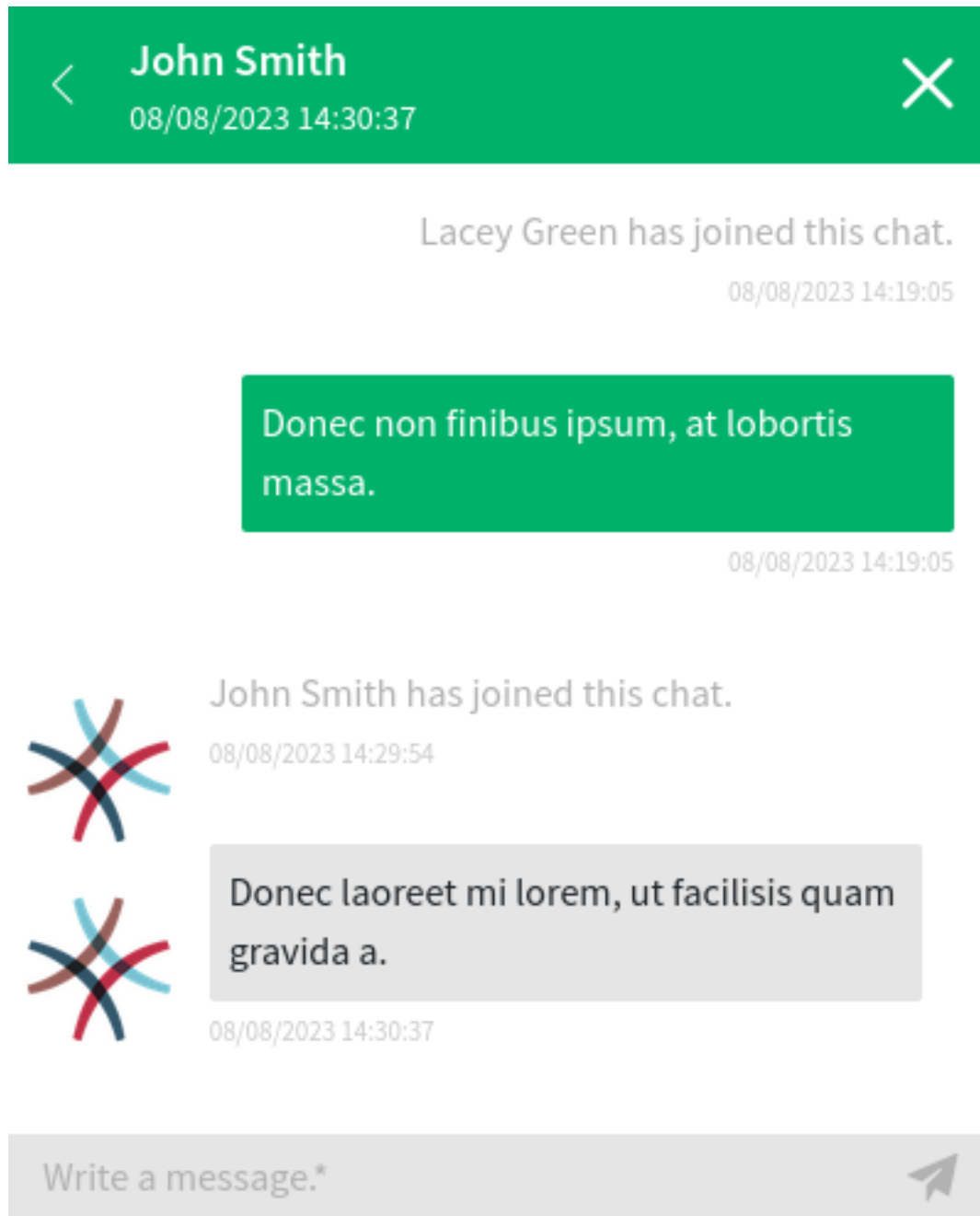


Fig. 23: Customer User Chat

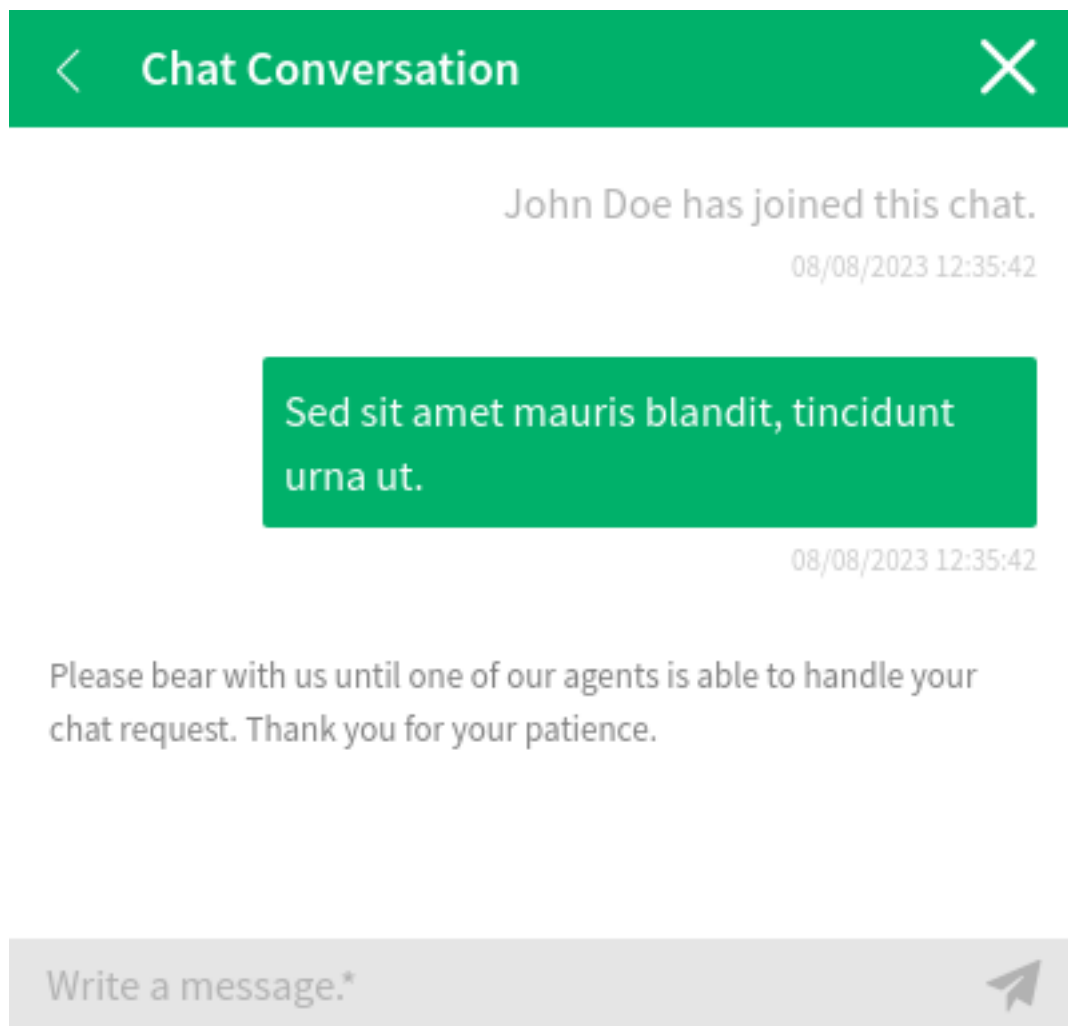


Fig. 24: Start Chat Window

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.



Fig. 25: Chat Request on 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.

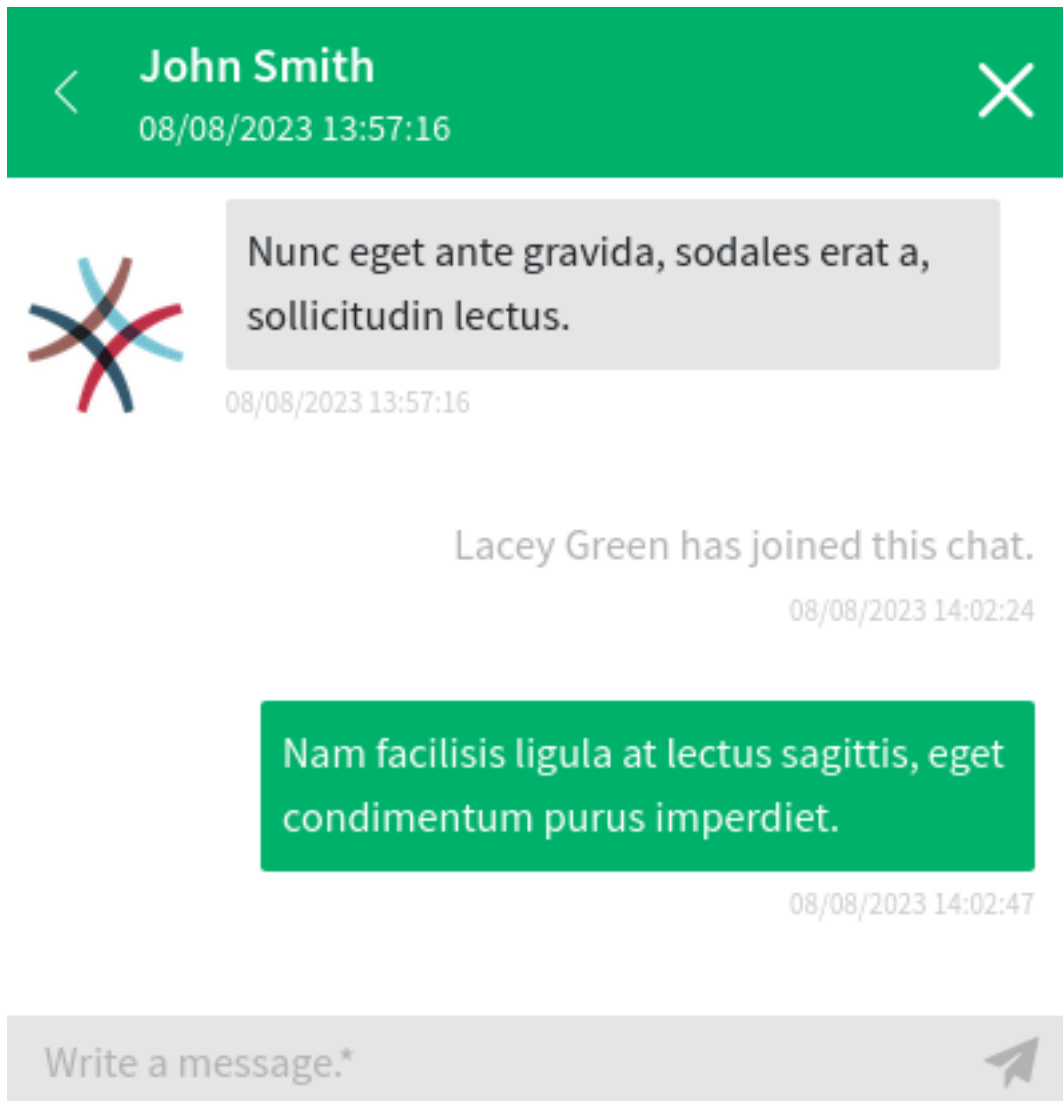
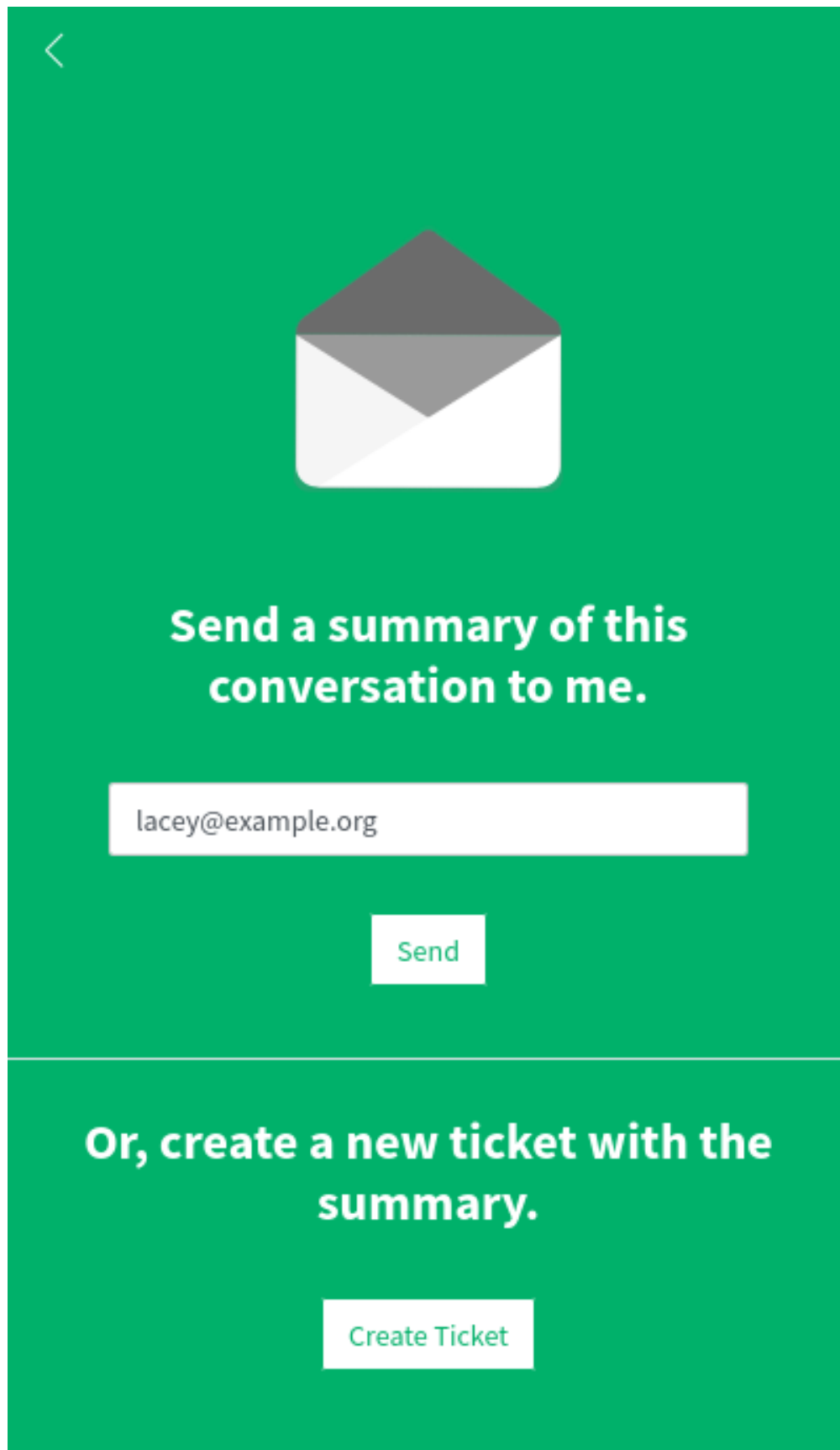



Fig. 26: Agent to Customer User Chat



The screenshot shows a green interface with a back arrow in the top left corner. In the center is a white envelope icon. Below it, the text "Send a summary of this conversation to me." is displayed. Underneath is a white input field containing the email address "lacey@example.org". Below the input field is a white button labeled "Send". A horizontal line separates this section from the bottom section, which contains the text "Or, create a new ticket with the summary." and a white button labeled "Create Ticket".

<



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* (Behindertengleichstellungsgesetz, 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 [accesskey chapter](#) in *MDN Web Docs* for more information.