



# **OTRS User Manual**

*Release 8.0*

**OTRS AG**

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## Login to Agent Interface

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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.

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 Email Authentication

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

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

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

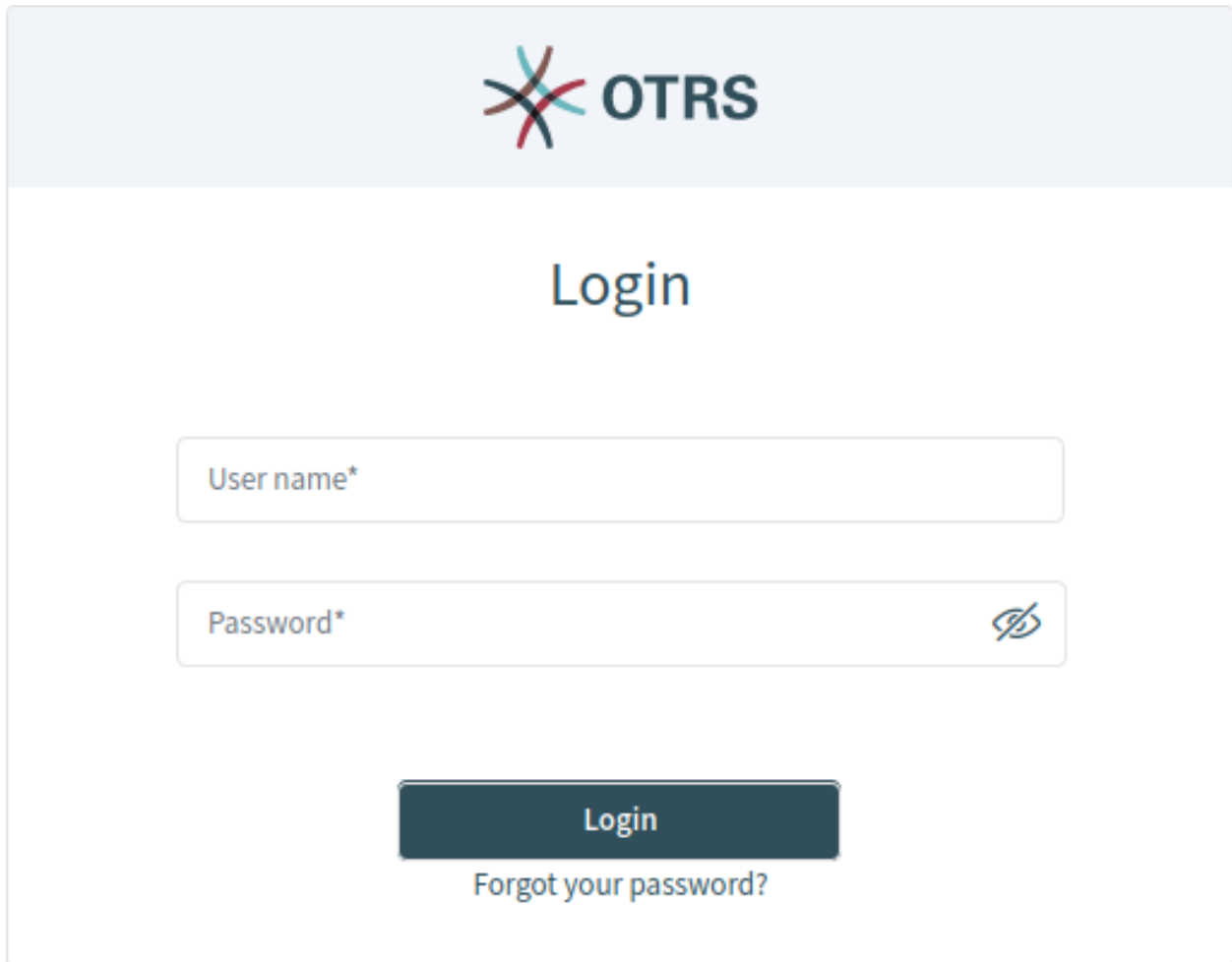
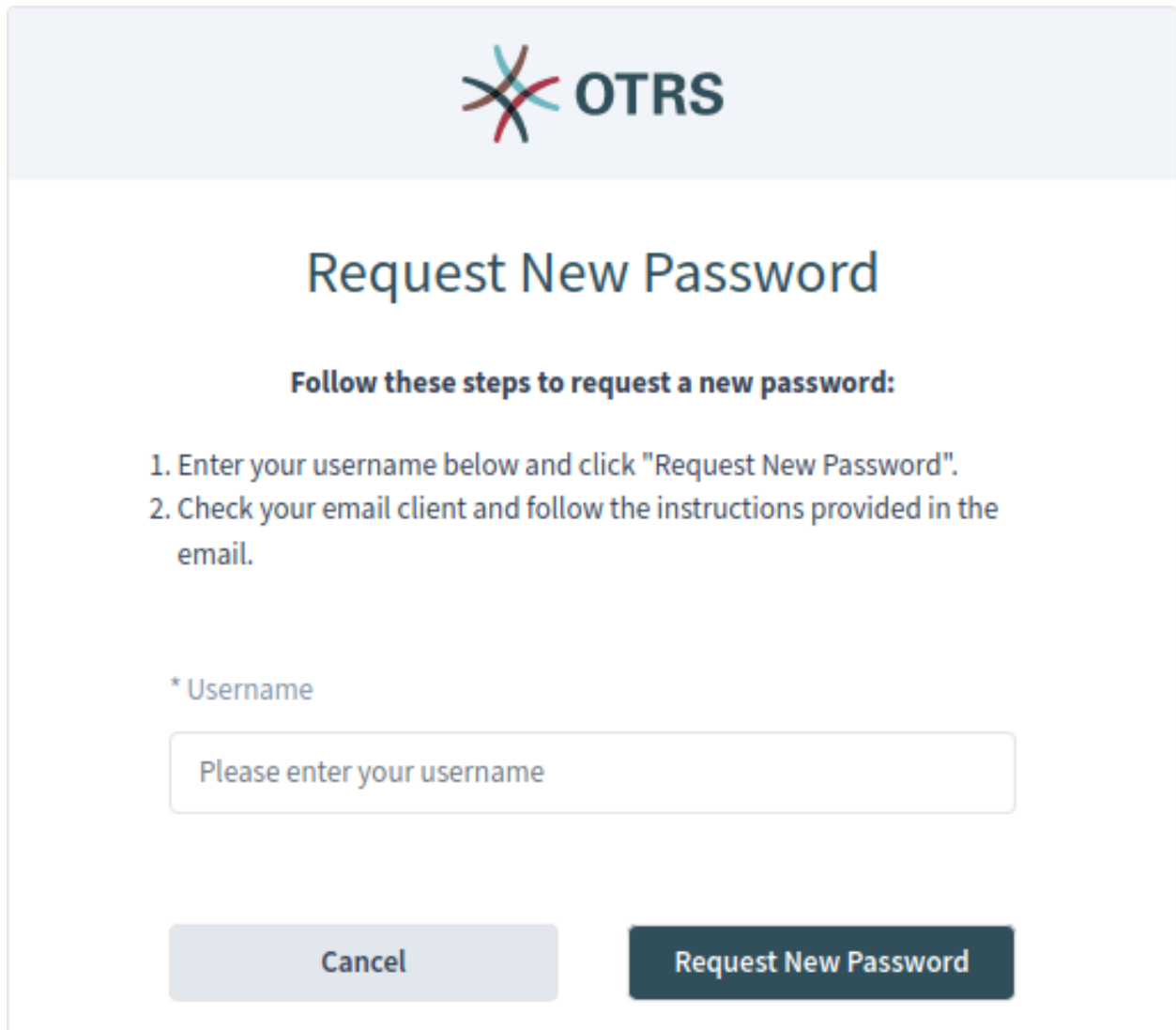



Fig. 1: Agent Login Screen



 OTRS

## 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. 2: Request New Password Screen

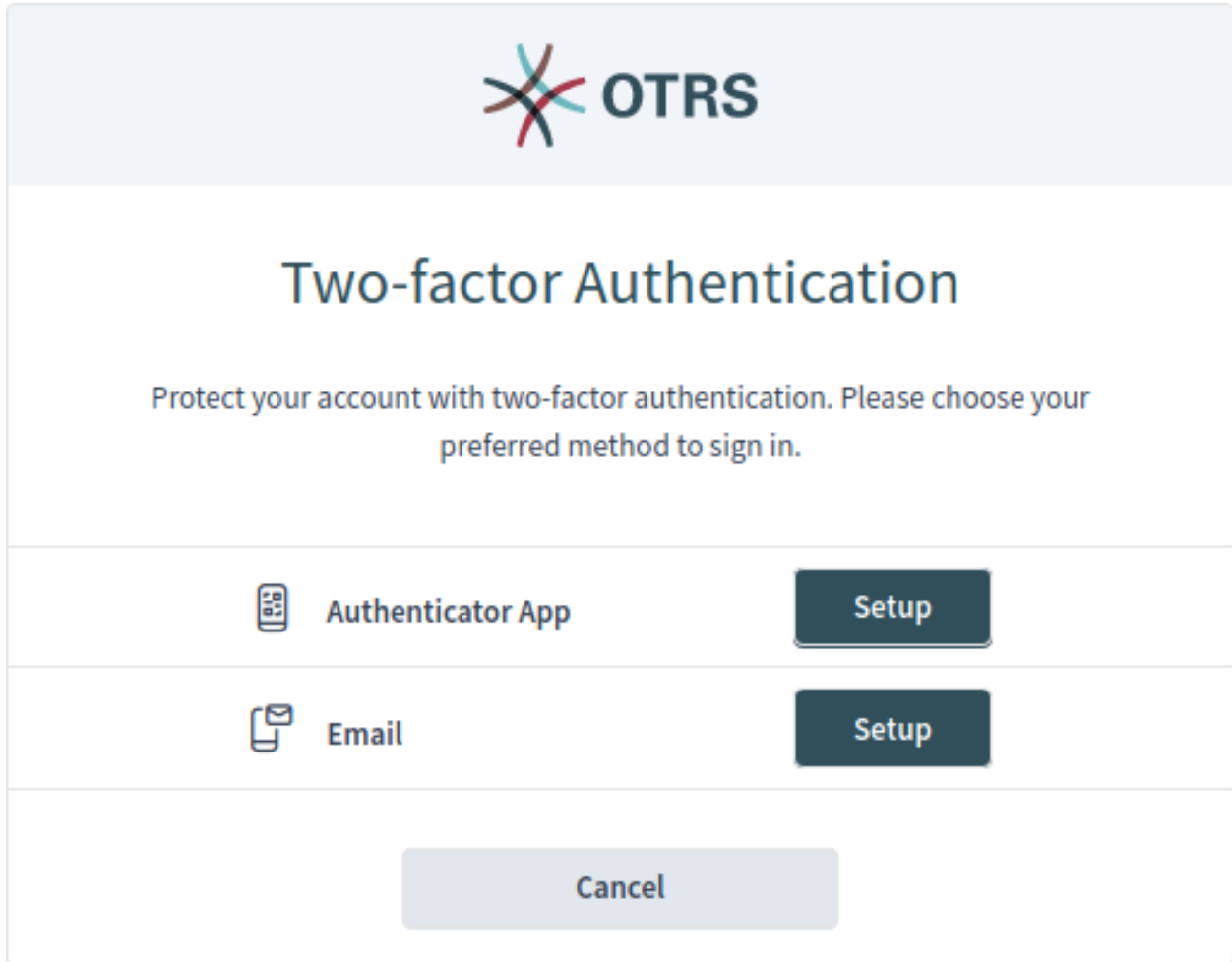


Fig. 3: Two-factor Authentication

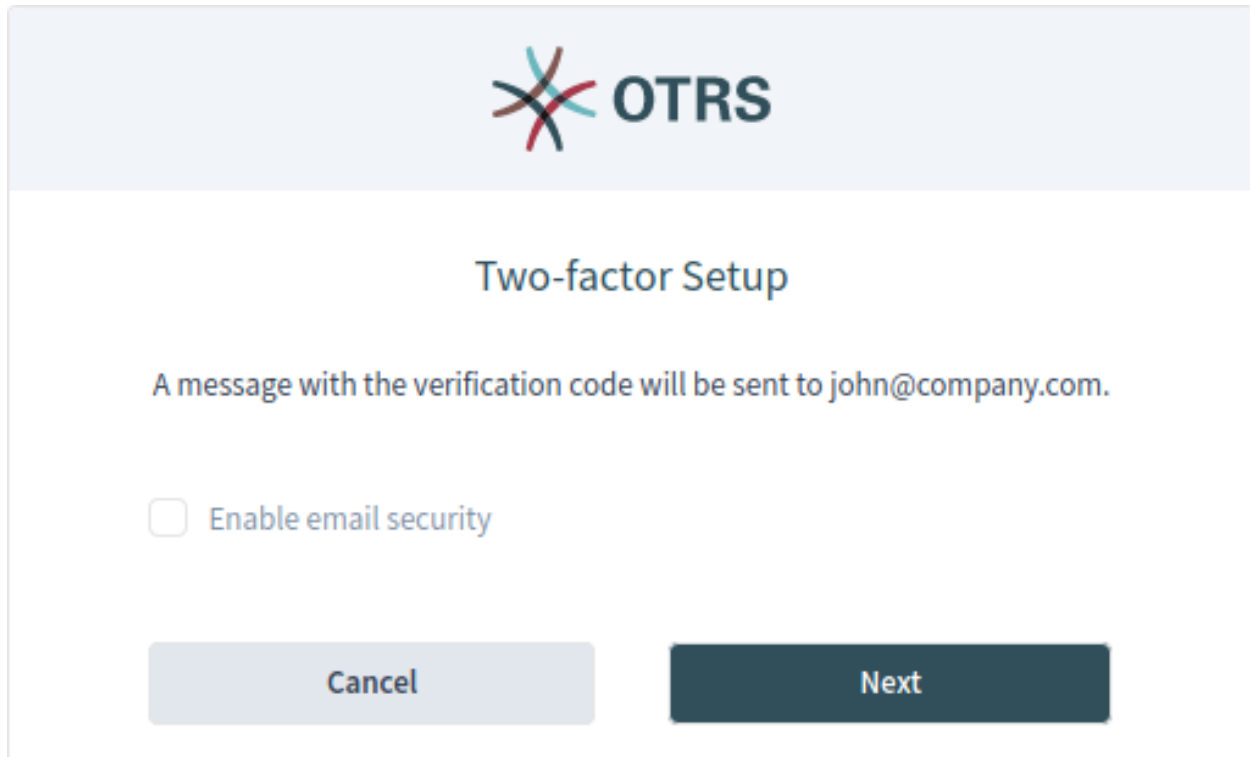


Fig. 4: Two-factor Setup for Email

## 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.

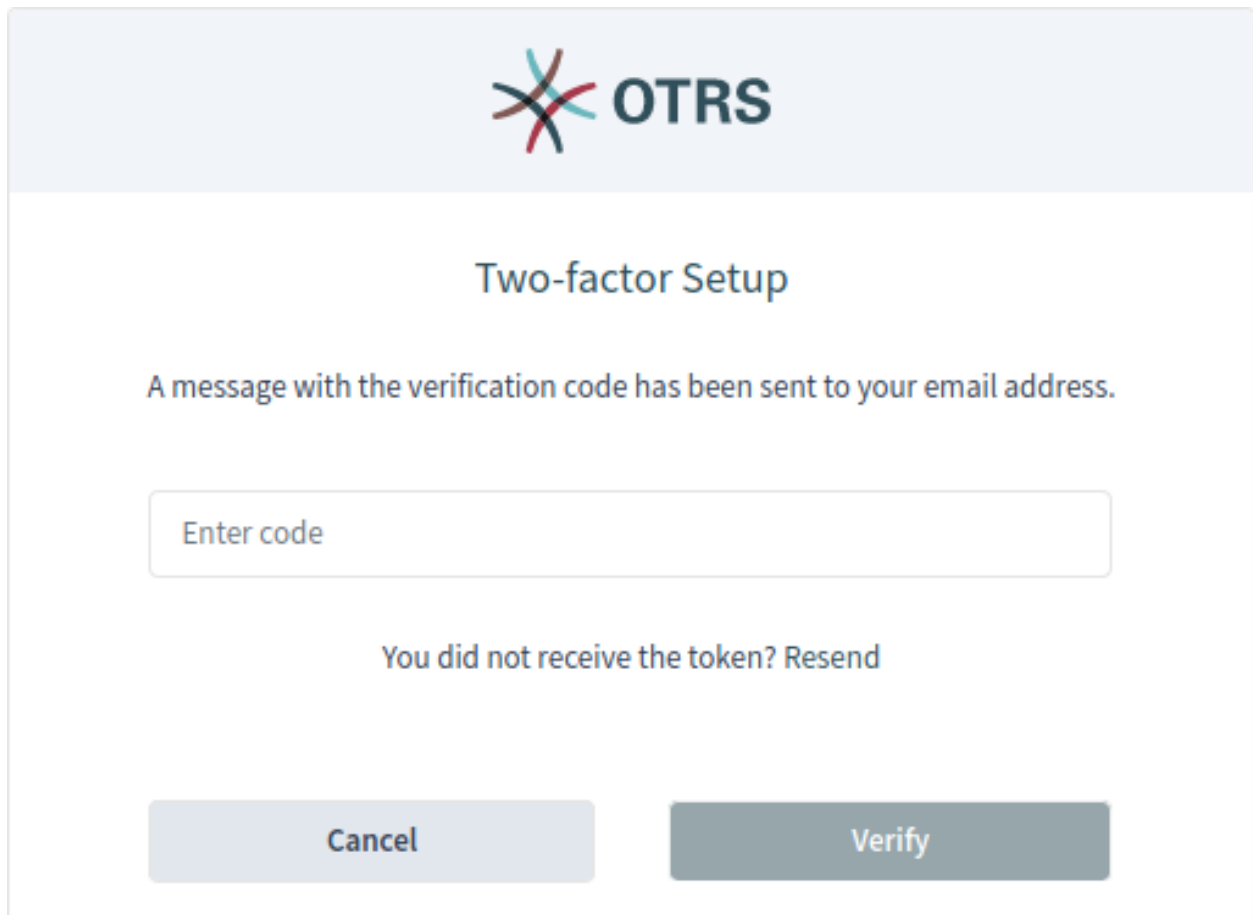
This setup can be changed in the *Security* section of the *Personalization* menu after the successful login.

## 1.3 First Login

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

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

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



The screenshot shows the OTRS Two-factor Setup interface. At the top, the OTRS logo is displayed. Below the logo, the title "Two-factor Setup" is centered. A message states: "A message with the verification code has been sent to your email address." Below this message is a text input field with the placeholder text "Enter code". Underneath the input field, there is a link that says "You did not receive the token? Resend". 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. 5: Two-factor Setup Email Verification

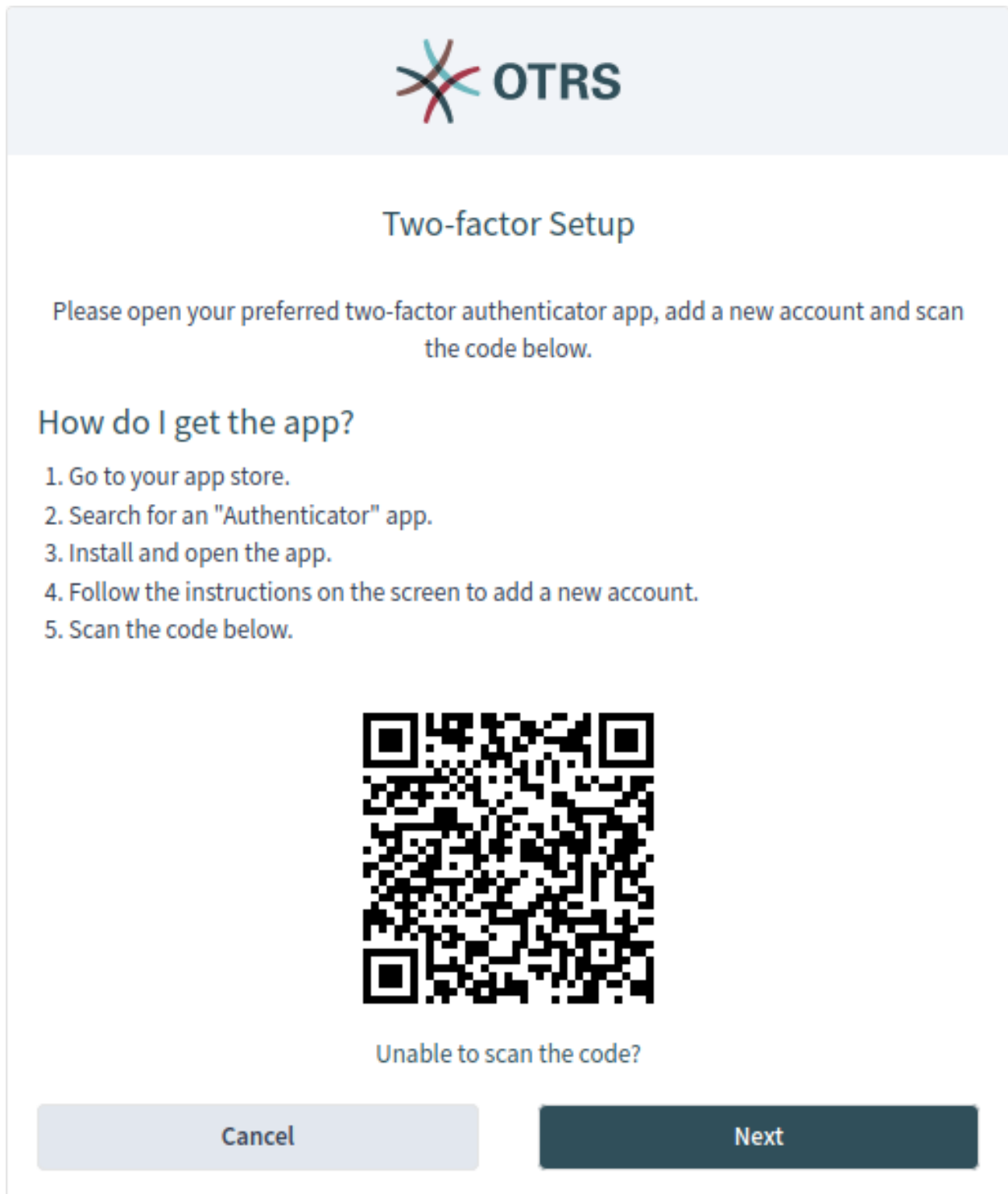
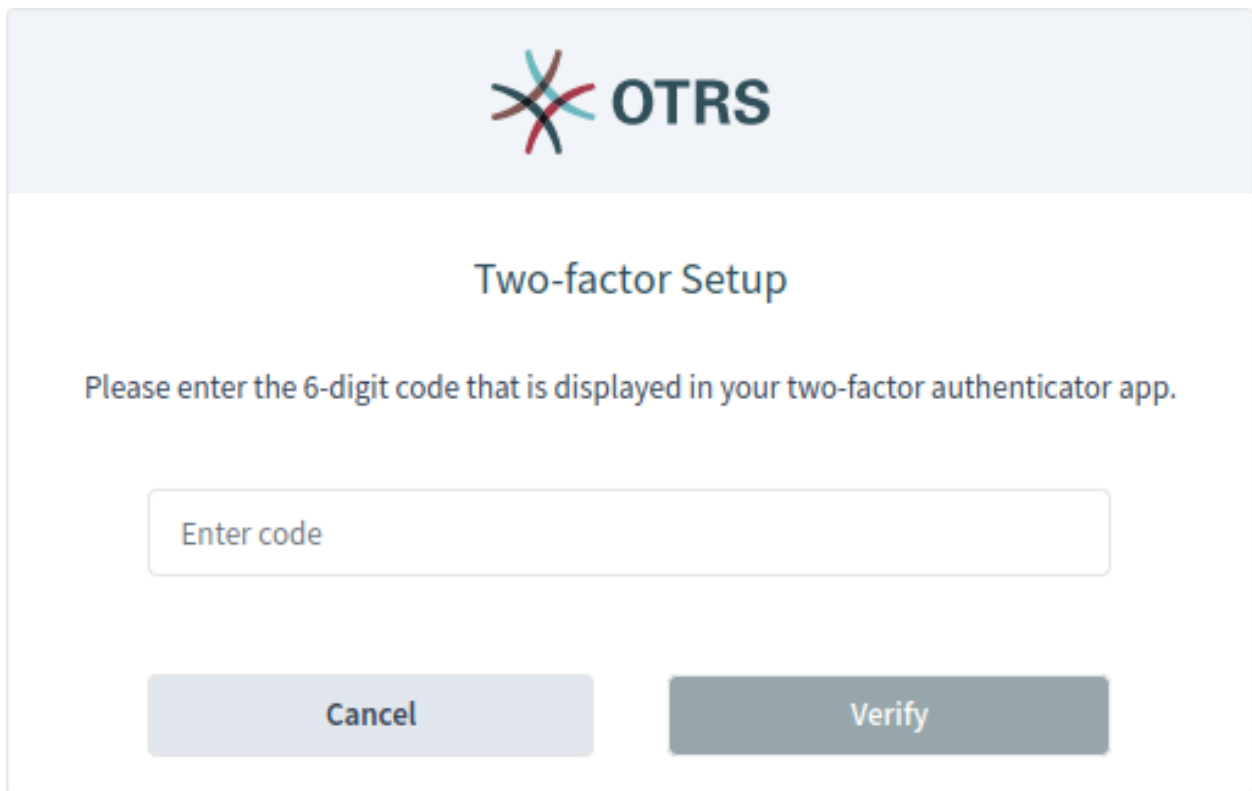


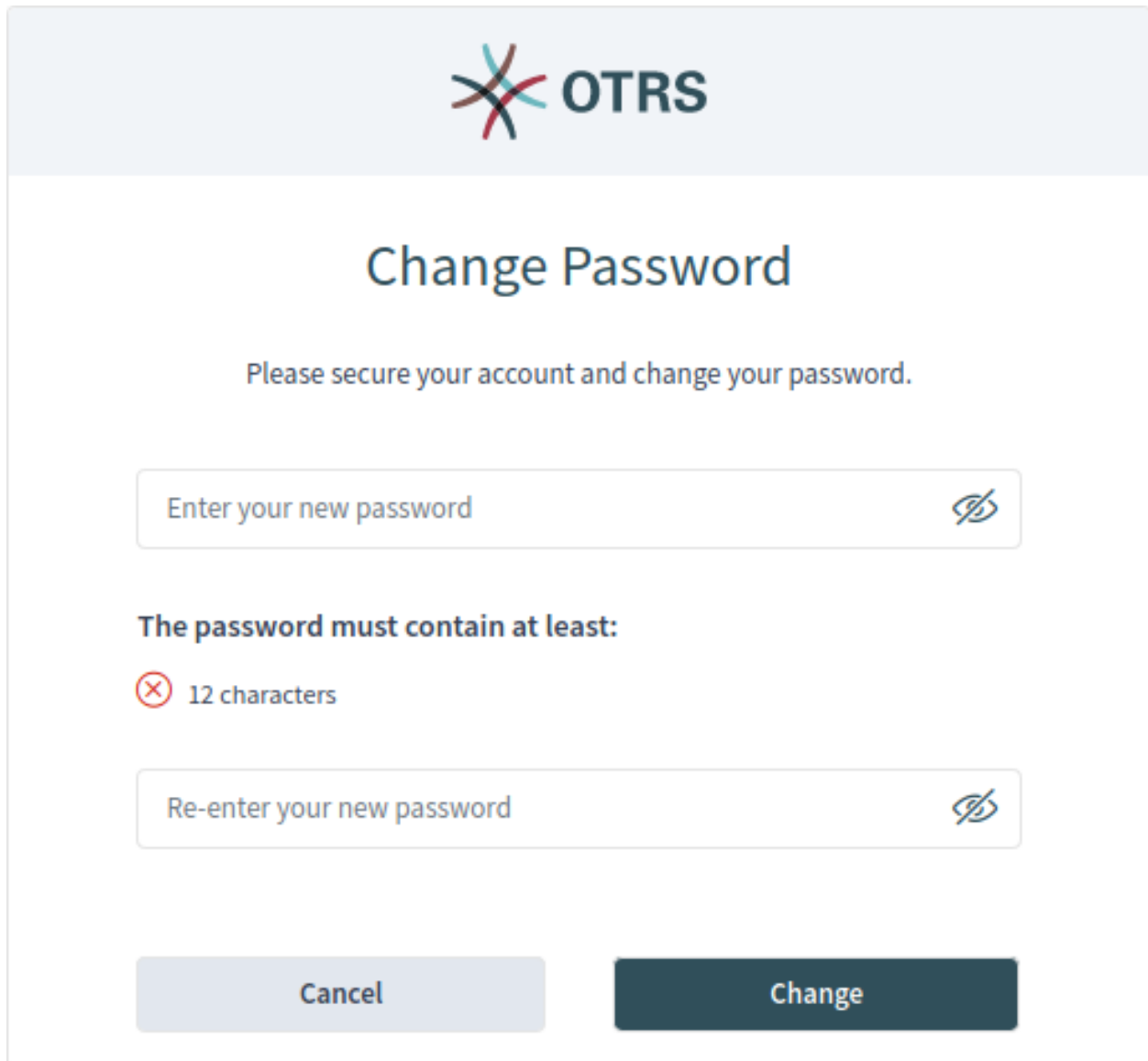
Fig. 6: Two-factor Setup for Authenticator App



The screenshot shows the OTRS Two-factor Setup verification screen. At the top, the OTRS logo is displayed. Below the logo, the title "Two-factor Setup" is centered. A message reads: "Please enter the 6-digit code that is displayed in your two-factor authenticator app." Below this message is a text input field with the placeholder text "Enter code". At the bottom of the form, there are two buttons: "Cancel" and "Verify".

Fig. 7: Two-factor Setup Authenticator App Verification






The screenshot shows the OTRS 'Change Password' interface. At the top, the OTRS logo is displayed. Below it, the title 'Change Password' is centered. A message reads: 'Please secure your account and change your password.' There are two password input fields, each with a toggle icon on the right. The first field is labeled 'Enter your new password'. Below it, a requirement list is shown: 'The password must contain at least:' followed by a red 'X' icon and the text '12 characters'. The second field is labeled 'Re-enter your new password'. At the bottom, there are two buttons: a light gray 'Cancel' button and a dark teal '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 

Fig. 8: Change Initial Password

The screenshot displays the OTRS Personal Dashboard. At the top, there is a navigation bar with a user profile, a hamburger menu, notification, search, and add icons, and the OTRS logo. Below this is a 'Dashboard' header with a scroll-to dropdown and view options. The main content area is divided into three sections:

- Queue Metric:** A table showing ticket counts across different states.
- Escalations:** A table that is currently empty, displaying 'Currently no data available.'
- Reminders (1 Ticket):** A table listing a single reminder ticket.

Queue	new	open	pending reminder	Total
Raw	1	4	1	6
<b>Total</b>	<b>1</b>	<b>4</b>	<b>1</b>	<b>6</b>

Number	Title	Priority	Created	Escalation Time
Currently no data available.				

Number	Title	Priority	Created	State	Pending till
2020022110000016	Application for leave - 2020-02-21 09:30:05 (UTC)	3 normal	a month ago	pending reminder	12 days ago

Fig. 9: Personal Dashboard

## 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.

The screenshot displays the OTRS Personal Dashboard. It features a dark sidebar on the left with navigation icons and a user profile picture. The main content area is light blue and contains three widget sections:

- Queue Metric:** A table showing ticket counts for 'new', 'open', and 'pending reminder' queues, with a 'Total' column.
- Escalations:** A table with columns for 'Number', 'Title', 'Priority', 'Created', and 'Escalation Time'. It currently shows 'Currently no data available.'
- Reminders (1 Ticket):** A table with columns for 'Number', 'Title', 'Priority', 'Created', 'State', and 'Pending till'. It shows one ticket with the title 'Application for leave - 2020-02-21 09:30:05 (UTC)' and a state of 'pending reminder'.

Queue	new	open	pending reminder	Total
Raw	1	4	1	6
<b>Total</b>	<b>1</b>	<b>4</b>	<b>1</b>	<b>6</b>

Number	Title	Priority	Created	Escalation Time
Currently no data available.				

Number	Title	Priority	Created	State	Pending till
2020022110000016	Application for leave - 2020-02-21 09:30:05 (UTC)	3 normal	a month ago	pending reminder	12 days ago

Fig. 1: Personal Dashboard

## 2.1 Navigation Elements

On the left side of the screen, there is a sidebar called the *organizer*. The organizer sidebar contains the personal settings of the current agent and shortcuts to business object lists. The items of the organizer sidebar can be customized in the *Personalization* menu. This organizer sidebar is hidden by default when using **OTRS** with 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.

Number	Title	Priority	Changed	Sender
2015071510123456	Welcome to OTRS!	3 normal	an hour ago	OTRS Feedback
2020032510000383	What is the real questions?	3 normal	2 days ago	787@fast-company-example-sales.co
2020032510000427	Why am I here?	1 very low	2 days ago	255@slow-company-example-service
2020032510000347	Why am I here?	2 low	2 days ago	92@slow-company-example-sales.co
2020032510000365	What a wonderful day!	4 high	2 days ago	471@example-service.net
2020032510000338	some subject alalal	5 very high	8 days ago	929@example-sales.com
2020032510000356	Why am I here?	3 normal	8 days ago	614@slow-company-example-sales.c
2020032510000374	Good morning!	3 normal	8 days ago	632@fast-company-example-sales.co
2020032510000392	Re: RE: AW: subject with very long lines	1 very low	8 days ago	308@company-service.com
2020032510000409	Re: subject alalal 1234	5 very high	8 days ago	871@example-service.com
2020032510000418	No problem, everything is ok!	2 low	8 days ago	400@slow-company-example-service

Reminders

Number	Title	Priority	Created	State	Pending till
--------	-------	----------	---------	-------	--------------

Fig. 2: Business Object List Preview

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.

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.

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

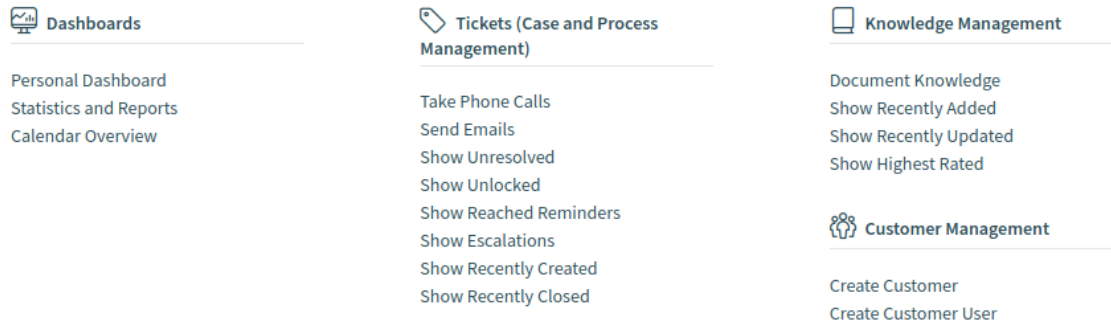


Fig. 3: Main Menu



Fig. 4: Header Toolbar

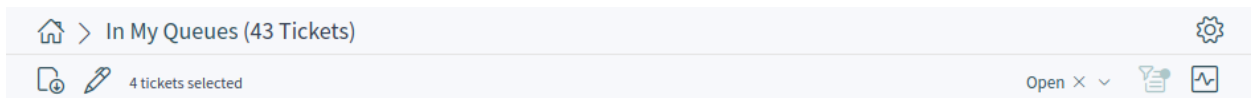


Fig. 5: Breadcrumb Bar For Business Object List

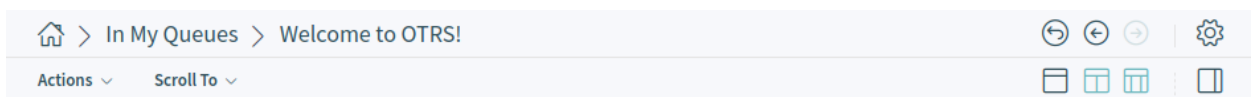


Fig. 6: Breadcrumb Bar For Business Object Detail View

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 hidden from or displayed in 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*.

## 2.2 Business Objects

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

- *Tickets*
- *Knowledge Base Articles*
- *Customers*
- *Customer Users*
- *Notifications*
- *Statistics and Reports*
- Other similar objects

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

### Edit screen ↗ ✕

Select the layout you want to edit ☐ ☐ ☐

You are editing the 2 column layout

Business Process Information <span>☐</span> <span>🗑</span>	Drafts <span>☐</span> <span>🗑</span>
Communication Stream <span>☐</span> <span>🗑</span>	Properties <span>☐</span> <span>🗑</span>
Attachments <span>☐</span> <span>🗑</span>	People <span>☐</span> <span>🗑</span>
<span>+</span>	Customer Information <span>☐</span> <span>🗑</span>
	Linked Tickets <span>☐</span> <span>🗑</span>
	Linked Knowledge Base Articles <span>☐</span> <span>🗑</span>
	Linked Appointments <span>☐</span> <span>🗑</span>
	<span>+</span>

Here you can design the column layout of the detail view according to your requirements.  
Please press the add button at the bottom to add a widget you want to get displayed.  
You can remove a widget by clicking the trash icon.  
You can change the settings of each widget directly from itself.

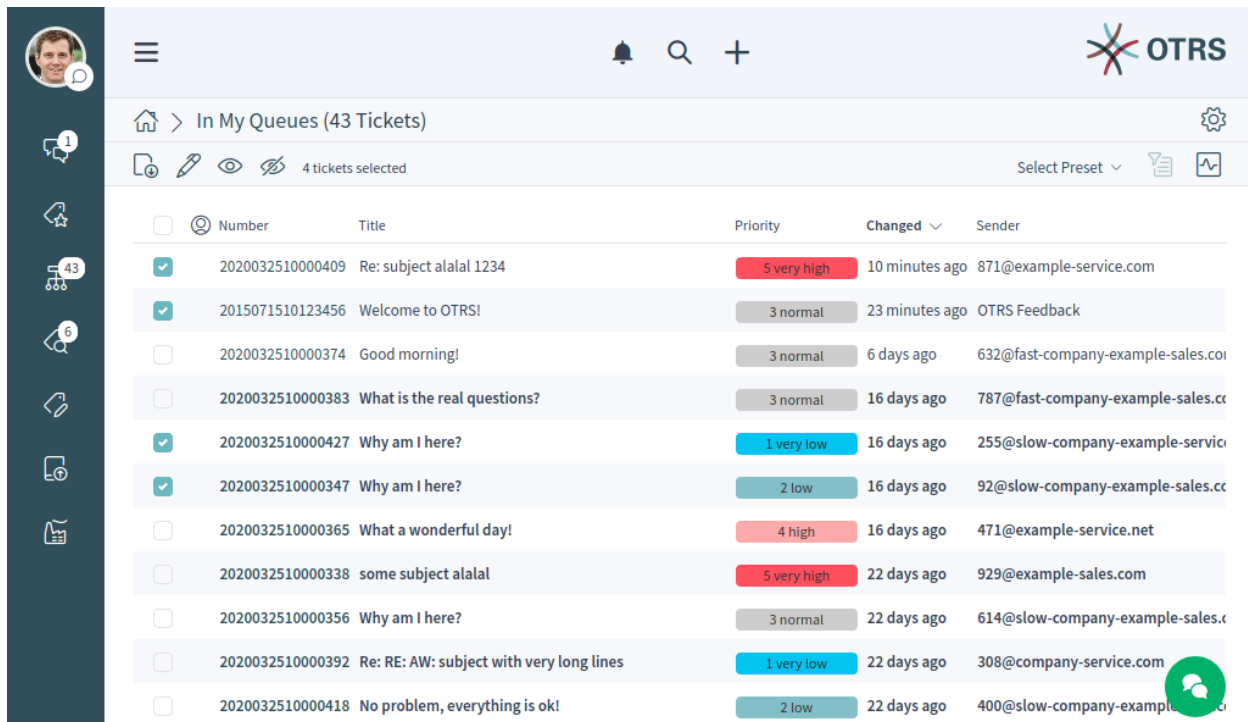
⚙ Hint: You can add widgets multiple times. Each widget has its own settings. ✕

↶ Reset to DefaultCancelSave

Fig. 7: Screen Configuration For Two-column Layout

## 2.3 Business Object Lists

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



<input type="checkbox"/>	Number	Title	Priority	Changed	Sender
<input checked="" type="checkbox"/>	2020032510000409	Re: subject alalal 1234	5 very high	10 minutes ago	871@example-service.com
<input checked="" type="checkbox"/>	2015071510123456	Welcome to OTRS!	3 normal	23 minutes ago	OTRS Feedback
<input type="checkbox"/>	2020032510000374	Good morning!	3 normal	6 days ago	632@fast-company-example-sales.co
<input type="checkbox"/>	2020032510000383	What is the real questions?	3 normal	16 days ago	787@fast-company-example-sales.cc
<input checked="" type="checkbox"/>	2020032510000427	Why am I here?	1 very low	16 days ago	255@slow-company-example-servic
<input checked="" type="checkbox"/>	2020032510000347	Why am I here?	2 low	16 days ago	92@slow-company-example-sales.cc
<input type="checkbox"/>	2020032510000365	What a wonderful day!	4 high	16 days ago	471@example-service.net
<input type="checkbox"/>	2020032510000338	some subject alalal	5 very high	22 days ago	929@example-sales.com
<input type="checkbox"/>	2020032510000356	Why am I here?	3 normal	22 days ago	614@slow-company-example-sales.c
<input type="checkbox"/>	2020032510000392	Re: RE: AW: subject with very long lines	1 very low	22 days ago	308@company-service.com
<input type="checkbox"/>	2020032510000418	No problem, everything is ok!	2 low	22 days ago	400@slow-company-examp

Fig. 8: 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 current 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 are sortable. Clicking on any visible and sortable column replaces the current sorting criteria and re-sorts the data based on the column's data. A sorted column is indicated by a small arrow at the top of the column.

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.

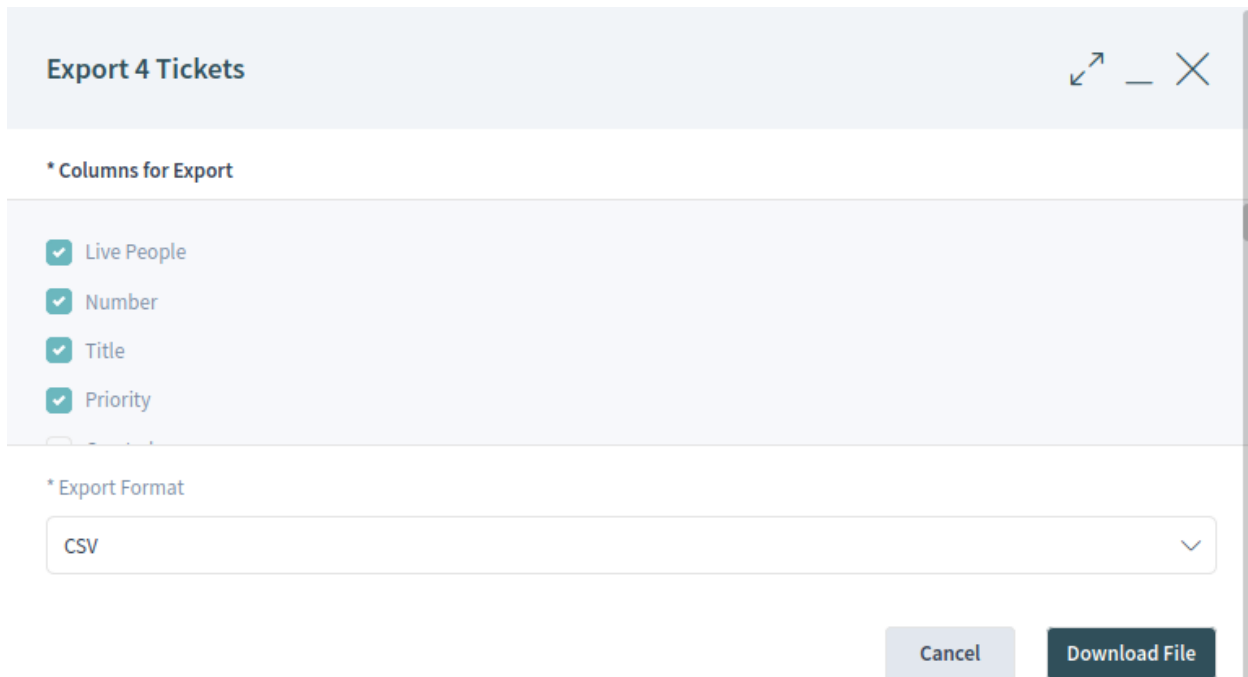


Fig. 9: Business Object List Export

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.

---

**Note:** If the list contains more objects than could be displayed, the non-visible objects are not selected.

---

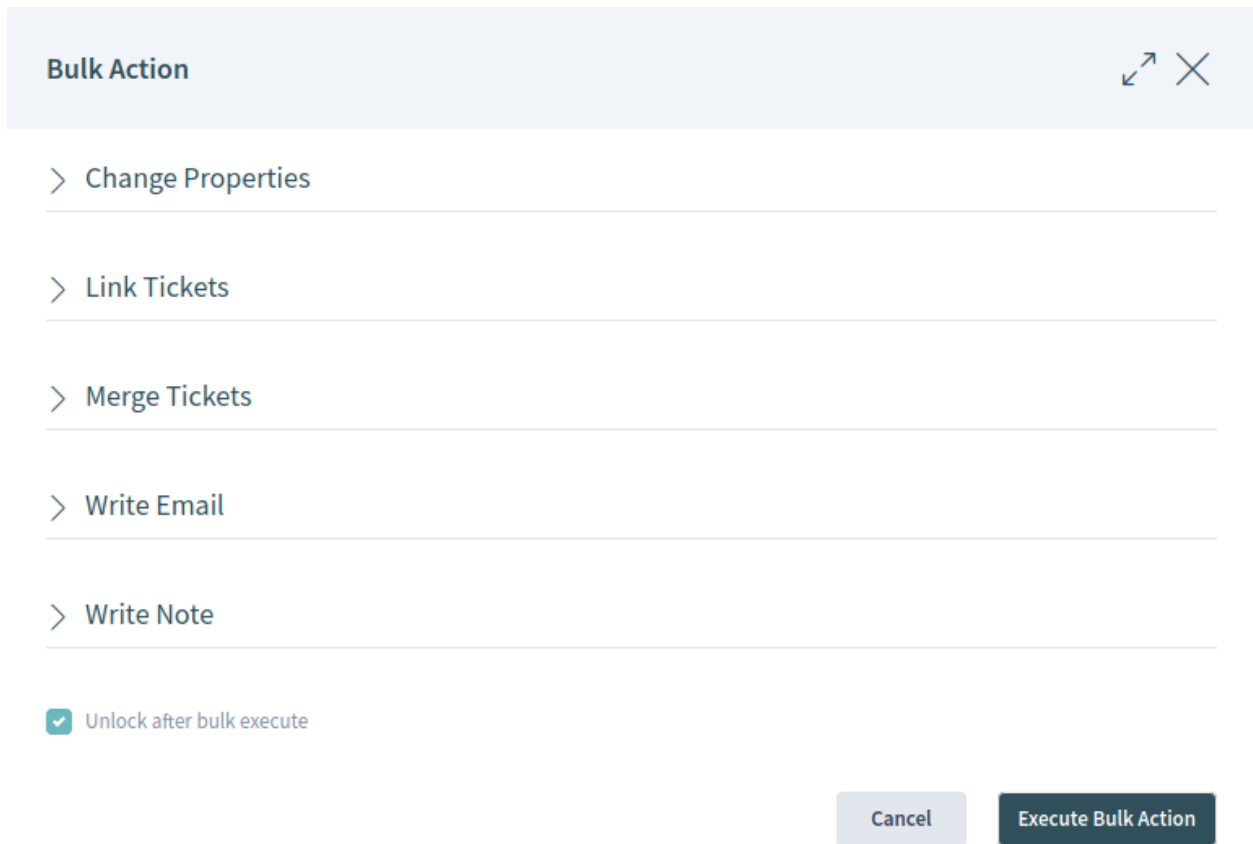


Fig. 10: Business Object List Bulk Action



Fig. 11: Business Object List Inline Edit

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.

**Edit screen** ↶ ✕

**\* Hide/Show Columns**

- Live People
- Number
- Title
- Priority

**\* Sort List**

Sort first by

Created (ascending) ▼ 🗑️

+ Add New Sorting

**Filter List**

Please select your filter

Select Filter ▼

+ Add New Filter

**\* Number of Results**

25 ✕ ▼

Cancel Save

Fig. 12: Business Object List Screen Configuration

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.

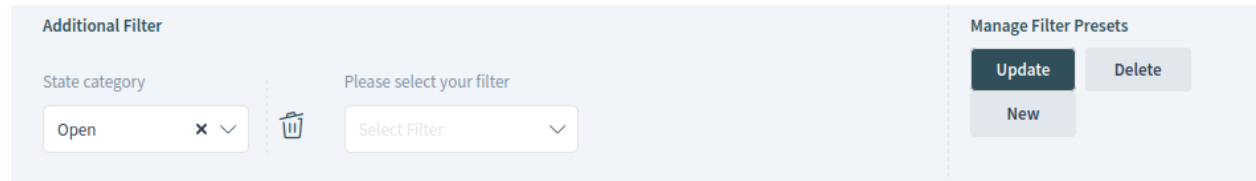


Fig. 13: Business Object List Filter Preset

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.

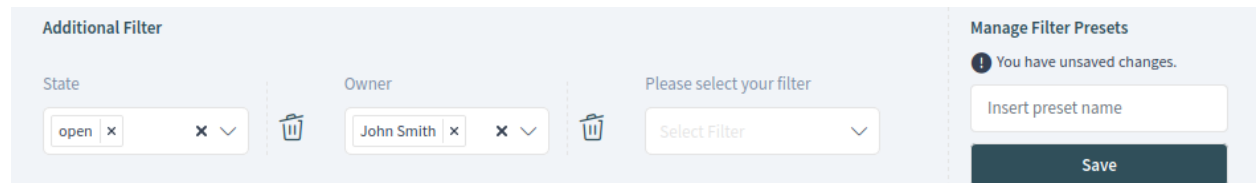


Fig. 14: Business Object List Filter

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.

## 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.

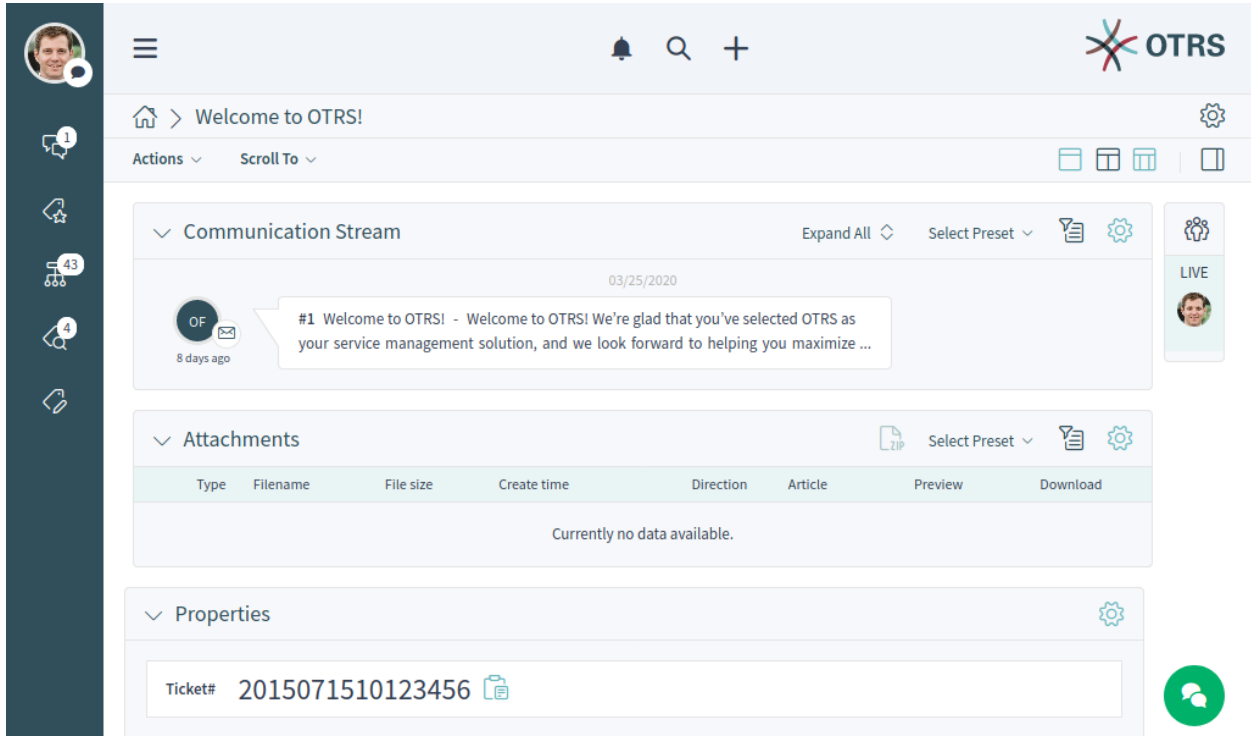


Fig. 15: Business Object Detail Example

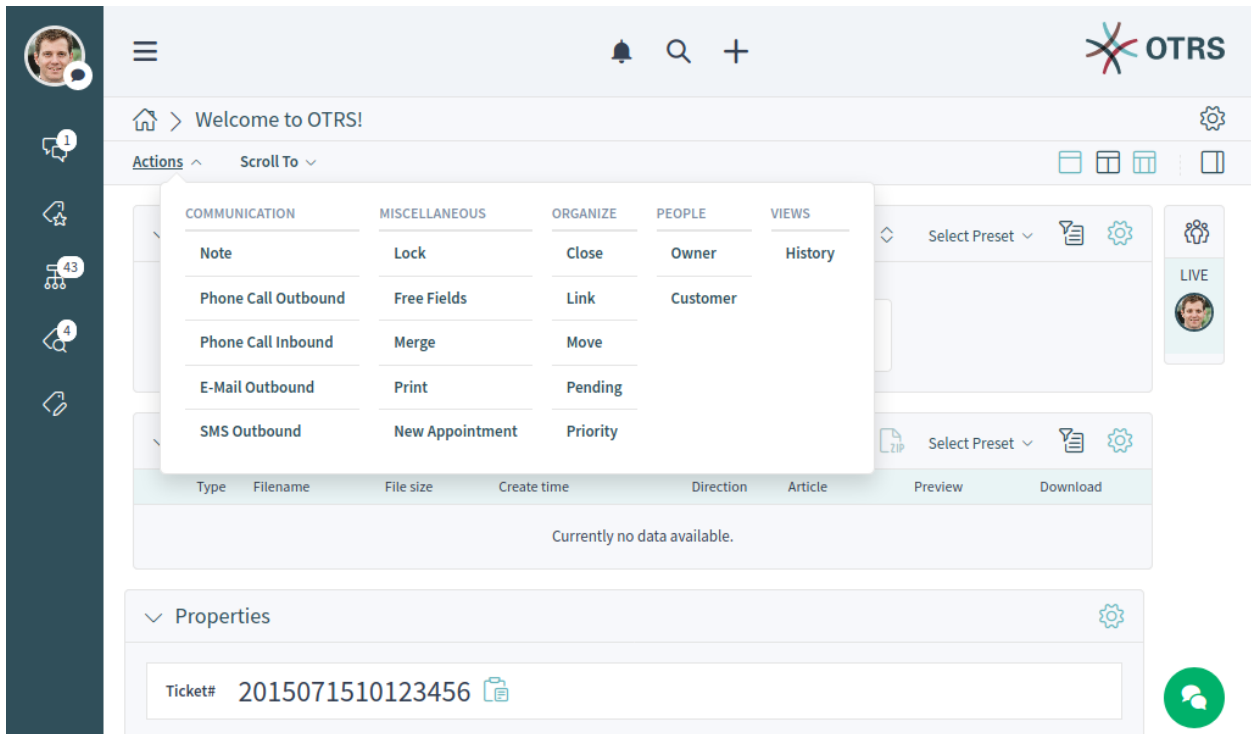


Fig. 16: Business Object Detail View Actions

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.

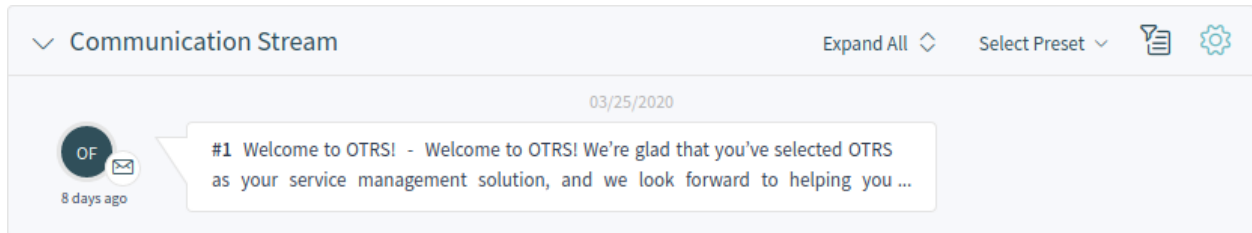


Fig. 17: Widget Overview

The content of a widget can be a table, a content area, or can consist of multiple content cards.

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. 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.

**Hide/Show Columns** In this list, columns 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.

### Edit Widget Configuration ✕

Widget Title

\* Article View Type

\* Sort List

Sort by

 ✕

**Filter List**

Please select your filter

[+ Add New Filter](#)

\* Number of Results

 ✕

[↶ Reset to Default](#) [Cancel](#) [Save](#)

Fig. 18: Widget Configuration





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.

### 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.

**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.

**See also:**

Translation status of incomplete languages is low, but you can help to improve the translation. See the [developer manual](#) for more information about translating **OTRS**.

**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.

## Personalization


---

 User Profile >

 Security >

 Notification Settings >

 Customize Organizer >

 Get Help

## Chat Availability

---

Not available v

## Login / Logout

---

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

## 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.

## 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.

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

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

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

## 3.4 Customize Organizer

This menu item contains the organizer sidebar customization possibilities.

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

To add an item to the organizer sidebar:

1. Click on the + icon to add a new item.
2. Toggle the icon chooser to set a different icon.























<b>Ticket Notifications</b> 	<b>all/none</b>			
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				

Fig. 2: Ticket Notifications Widget








<b>Appointment Notifications</b> 	<b>all/none</b>			
Appointment reminder notification				

Fig. 3: Appointment Notifications Widget

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.

## 3.5 Get Help

This menu item is a link to the user manual of the agent interface. It points to the [Documentation Portal](#).

## 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.

## 3.7 Login / Logout

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

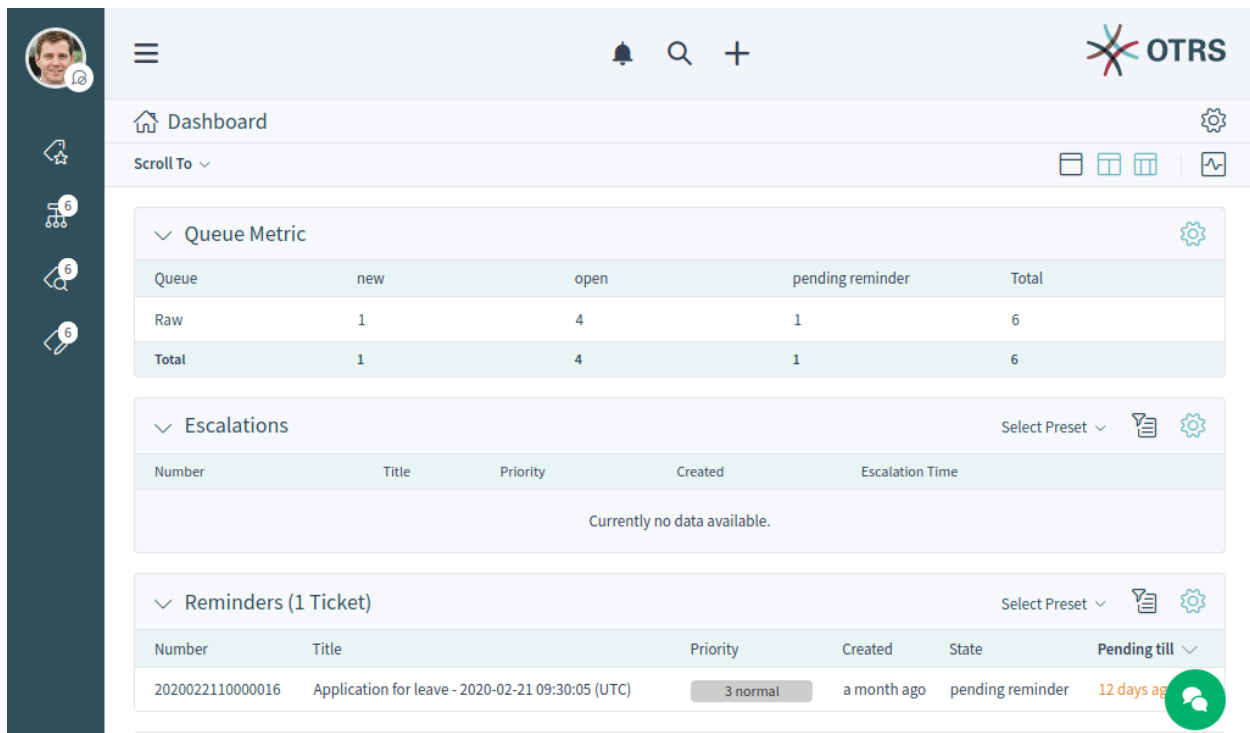


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## Personal Dashboard

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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. It features a dark sidebar on the left with a user profile and navigation icons. The main content area has a light blue header with a navigation menu, search, and notification icons. Below the header is a breadcrumb bar with a 'Dashboard' link and a settings icon. The dashboard contains three main widgets:

- Queue Metric:** A table showing ticket counts for different queue states.
- Escalations:** A table showing ticket escalation details, currently empty.
- Reminders (1 Ticket):** A table showing a single reminder ticket.

Queue	new	open	pending reminder	Total
Raw	1	4	1	6
<b>Total</b>	<b>1</b>	<b>4</b>	<b>1</b>	<b>6</b>

Number	Title	Priority	Created	Escalation Time
Currently no data available.				

Number	Title	Priority	Created	State	Pending till
2020022110000016	Application for leave - 2020-02-21 09:30:05 (UTC)	3 normal	a month ago	pending reminder	12 days ago

Fig. 1: 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.



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.

### 5.1 Create Ticket

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

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

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

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

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

**SMS Ticket** SMS ticket is used 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.

### 5.1.1 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.

The screenshot shows the 'Customer' section of the OTRS Properties Widget. At the top, there is a dropdown arrow and the text 'Customer'. Below this is a search field labeled '\* Customer User' containing the text '"Lacey Green" <lacey@example.org>'. To the right of the search field are icons for clearing the search, a magnifying glass, and a person icon. Below the search field is a dropdown menu labeled 'Customer ID' with the value 'supersupport'.

Fig. 1: 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.

The screenshot shows the 'Assignment' section of the OTRS Properties Widget. At the top, there is a dropdown arrow and the text 'Assignment'. Below this are three dropdown menus: '\* Queue', 'Owner', and 'Responsible'. Each dropdown menu has a 'Select...' option and a dropdown arrow.

Fig. 2: Queue And Owner Selection

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

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

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

---

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

---

**Service Level Management** In this section, the priority and the next ticket state can be selected.

**Priority \*** New tickets have a *3 normal* priority by default. Select another priority if you want to change it.

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

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

The screenshot shows a configuration panel for 'Service Level Management'. It contains two dropdown menus. The first is labeled '\* Priority' and has '3 normal' selected. The second is labeled '\* State' and has 'open' selected. Both dropdowns have a small information icon to their right.

Fig. 3: Priority And State Selection

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 on the email, if needed. This field is displayed only for email tickets.

**Bcc** Select other customer users as blind carbon copy on 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.

**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.

### 5.1.2 Customer Information Widget

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

### 5.1.3 Customer User History Widget

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

### 5.1.4 Customer History Widget

This widget shows the tickets for the customer selected above.

Communication

\* From

\*Lacey Green\* <lacey@example.org> X

To

Text Template


Select...

*Setting a template will overwrite any text or attachment.*

\* Subject

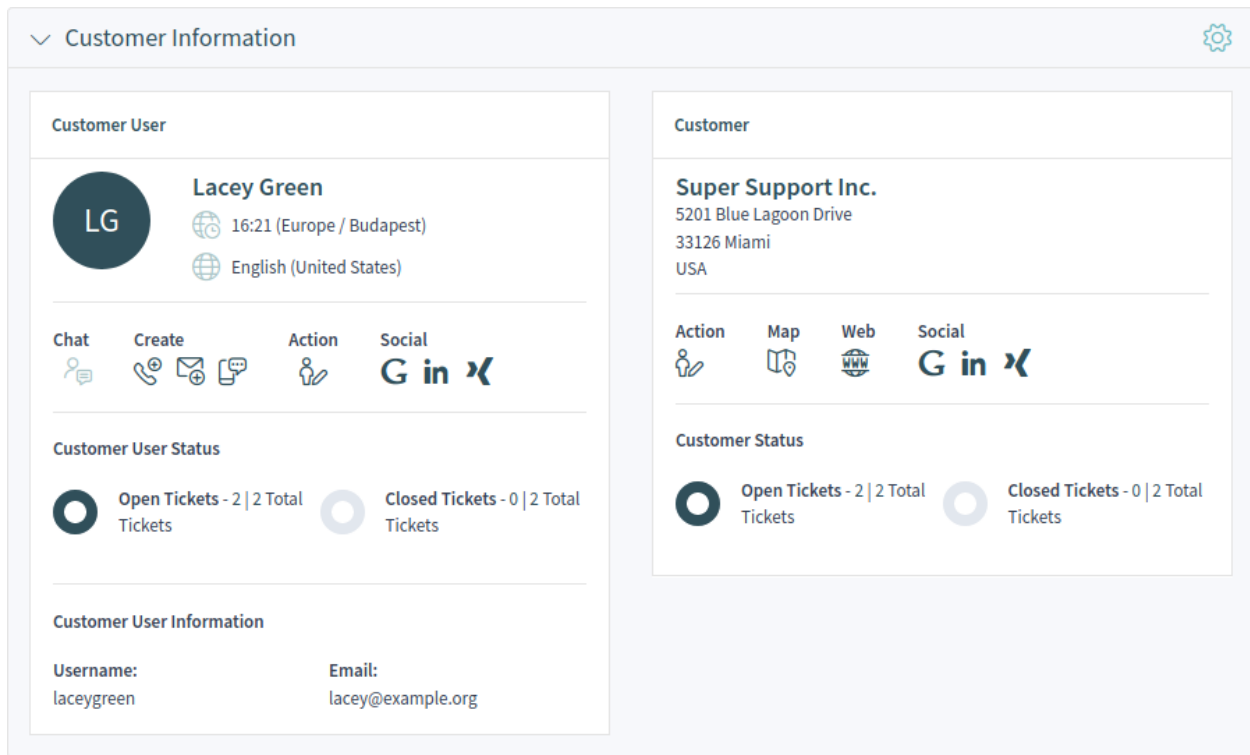
\* Body

Attachments

 Drop files here or click to select files

Time Units (work units)

Fig. 4: Write The Message



The Customer Information Widget is divided into two main sections: Customer User and Customer.

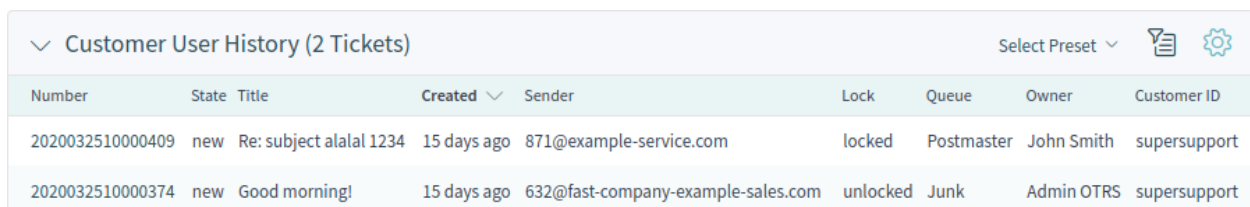
**Customer User:**

- Profile:** Lacey Green, 16:21 (Europe / Budapest), English (United States).
- Actions:** Chat, Create, Action, Social (G in X).
- Status:** Open Tickets - 2 | 2 Total Tickets, Closed Tickets - 0 | 2 Total Tickets.
- Information:** Username: laceygreen, Email: lacey@example.org.

**Customer:**

- Company:** Super Support Inc., 5201 Blue Lagoon Drive, 33126 Miami, USA.
- Actions:** Action, Map, Web, Social (G in X).
- Status:** Open Tickets - 2 | 2 Total Tickets, Closed Tickets - 0 | 2 Total Tickets.

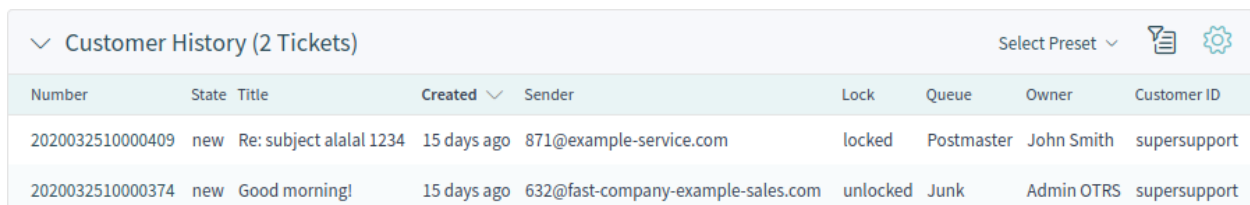
Fig. 5: Customer Information Widget



Customer User History (2 Tickets)

Number	State	Title	Created	Sender	Lock	Queue	Owner	Customer ID
2020032510000409	new	Re: subject alalal 1234	15 days ago	871@example-service.com	locked	Postmaster	John Smith	supersupport
2020032510000374	new	Good morning!	15 days ago	632@fast-company-example-sales.com	unlocked	Junk	Admin OTRS	supersupport

Fig. 6: Customer User History Widget



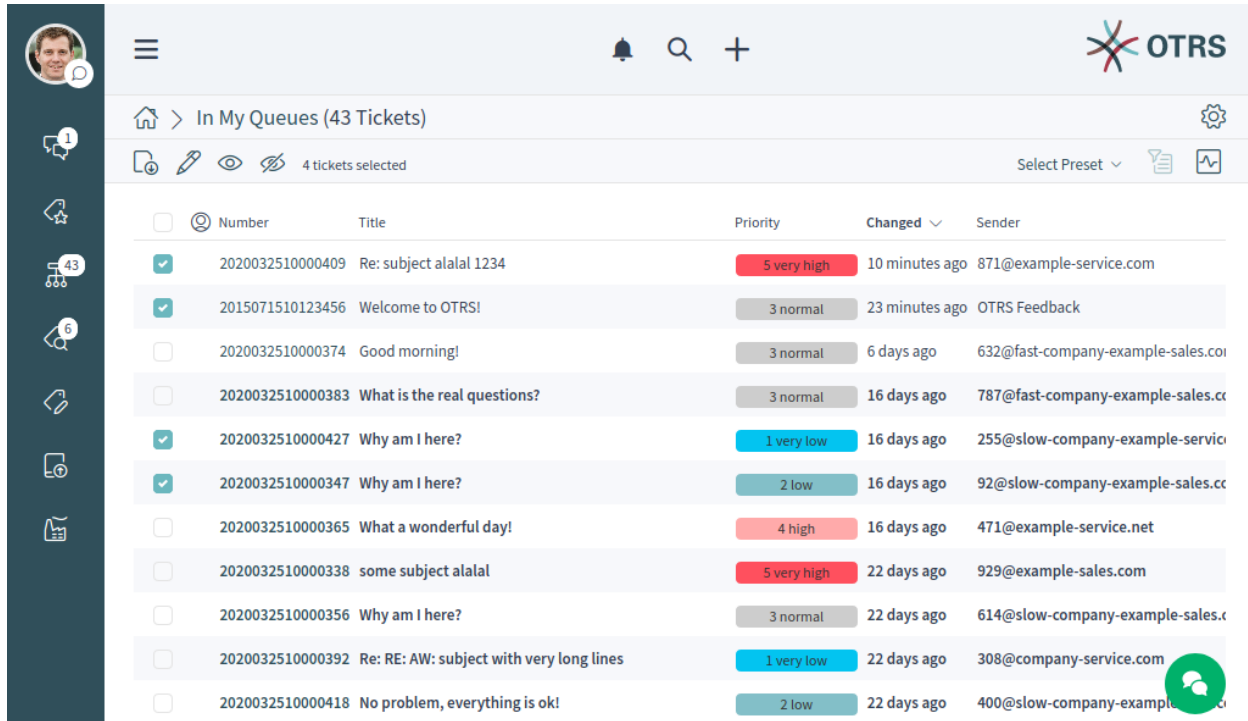
Customer History (2 Tickets)

Number	State	Title	Created	Sender	Lock	Queue	Owner	Customer ID
2020032510000409	new	Re: subject alalal 1234	15 days ago	871@example-service.com	locked	Postmaster	John Smith	supersupport
2020032510000374	new	Good morning!	15 days ago	632@fast-company-example-sales.com	unlocked	Junk	Admin OTRS	supersupport

Fig. 7: Customer History Widget

## 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.



<input type="checkbox"/>	Number	Title	Priority	Changed	Sender
<input checked="" type="checkbox"/>	2020032510000409	Re: subject alalal 1234	5 very high	10 minutes ago	871@example-service.com
<input checked="" type="checkbox"/>	2015071510123456	Welcome to OTRS!	3 normal	23 minutes ago	OTRS Feedback
<input type="checkbox"/>	2020032510000374	Good morning!	3 normal	6 days ago	632@fast-company-example-sales.co
<input type="checkbox"/>	2020032510000383	What is the real questions?	3 normal	16 days ago	787@fast-company-example-sales.co
<input checked="" type="checkbox"/>	2020032510000427	Why am I here?	1 very low	16 days ago	255@slow-company-example-servic
<input checked="" type="checkbox"/>	2020032510000347	Why am I here?	2 low	16 days ago	92@slow-company-example-sales.cc
<input type="checkbox"/>	2020032510000365	What a wonderful day!	4 high	16 days ago	471@example-service.net
<input type="checkbox"/>	2020032510000338	some subject alalal	5 very high	22 days ago	929@example-sales.com
<input type="checkbox"/>	2020032510000356	Why am I here?	3 normal	22 days ago	614@slow-company-example-sales.c
<input type="checkbox"/>	2020032510000392	Re: RE: AW: subject with very long lines	1 very low	22 days ago	308@company-service.com
<input type="checkbox"/>	2020032510000418	No problem, everything is ok!	2 low	22 days ago	400@slow-company-examp

Fig. 8: Ticket List

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.

### 5.2.1 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 like the owner or the responsible of the ticket.

**Note:** The ticket watch 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. 9: 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 ⓘ

Select... ▾

Queue ⓘ

Select... ▾

Owner ⓘ

Select... ▾

Priority ⓘ

Select... ▾

Fig. 10: 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.

#### ∨ Link Tickets

---

Do not link

Link together

🔍

Fig. 11: Link Tickets

**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.

**Warning:** The merge action can not be undone.

#### ∨ Merge Tickets

---

Do not merge

Merge to oldest

🔍

Fig. 12: 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.



∨ Write Email

Recipients

255@slow-company-example-service.com, 92@slow-company-example-sales.com, lacey@example.org

Subject ⓘ

Body ⓘ

Time Units (Work Units)

Fig. 13: Write Email

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


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

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

∨ Write Note

---

Subject 

Body 

Visible for customer

Time Units (Work Units)

Fig. 14: 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.

## 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.

### 5.3.1 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.

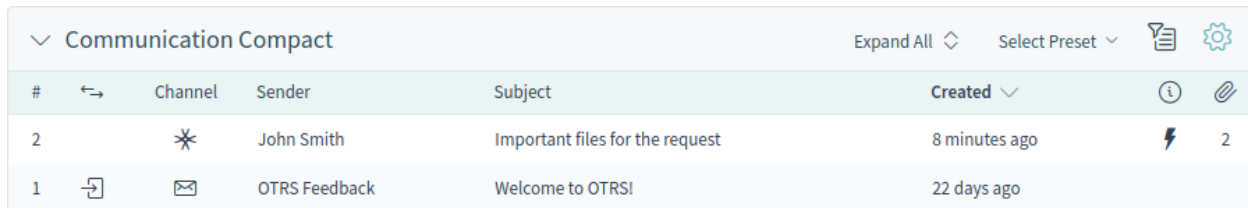
Clicking on an item in the list opens the draft to continue editing it.



Title	Saved	Type	Delete
Add Note - John Smith - 04/16/2020 12:06 (Europe/Budapest)	7 minutes ago	Note	

Fig. 15: 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.



#	↔	Channel	Sender	Subject	Created	ⓘ	📎
2	*		John Smith	Important files for the request	8 minutes ago	⚡	2
1	↔	✉	OTRS Feedback	Welcome to OTRS!	22 days ago		

Fig. 16: 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.

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

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

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

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

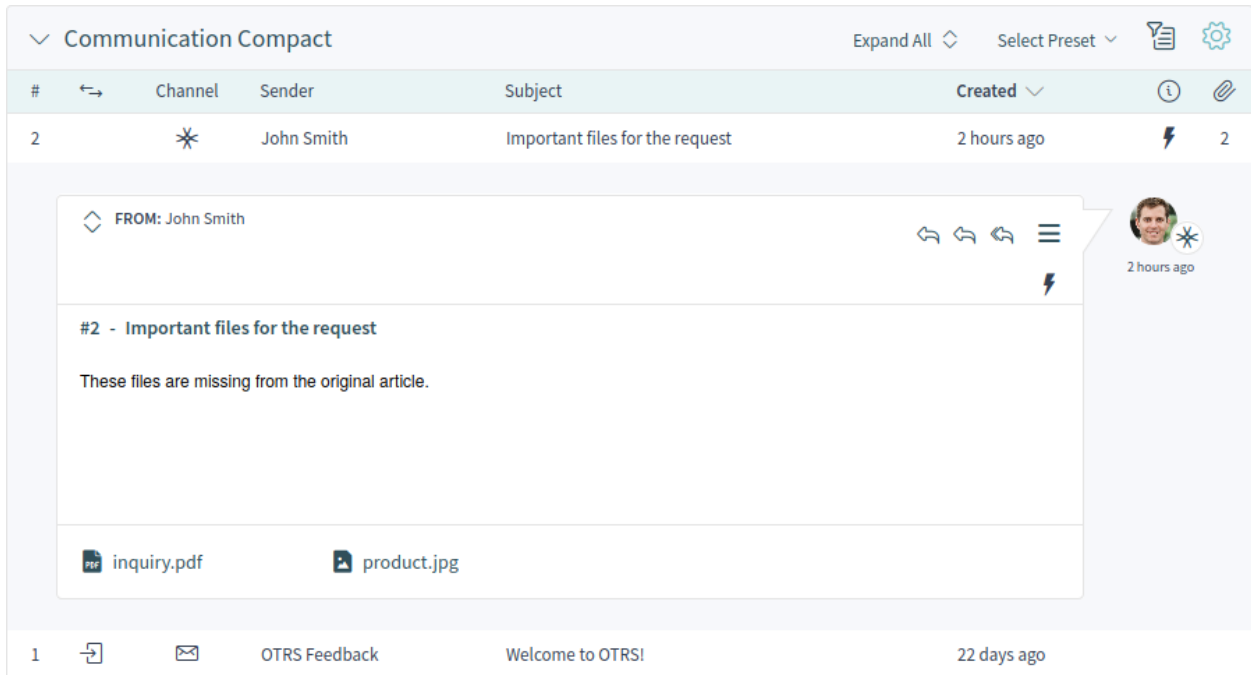


Fig. 17: Expanded Communication Compact Widget

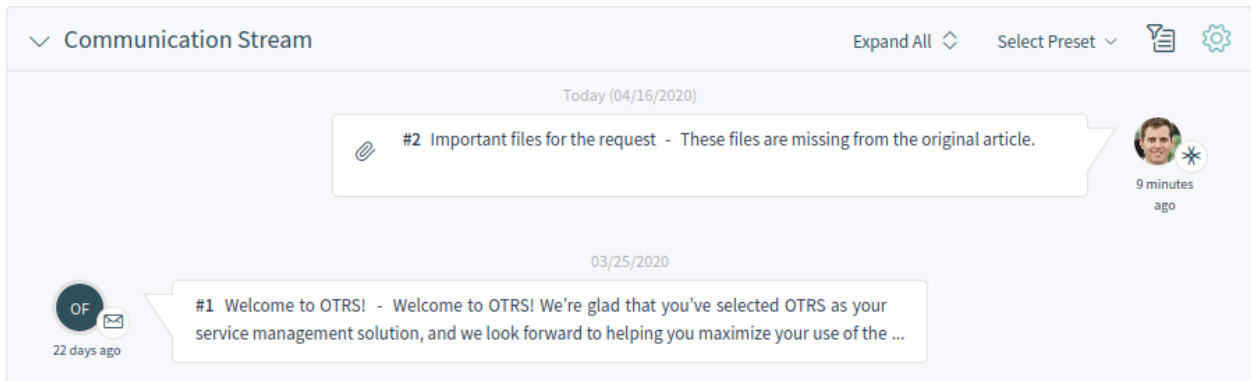


Fig. 18: Communication Stream Widget

The Properties Widget displays the following information for ticket # 2015071510123456:

- Ticket#**: 2015071510123456
- Created**: Ticket Creation Time: 22 days ago
- Lock**: Lock Status: Ticket is unlocked
- Watch**: Current Watch Status: Ticket is unwatched
- Priority**: 3 normal
- Queue**: Raw
- State**: new
- Accounted Time**: 10

Fig. 19: Properties Widget

Most of the cards have a pen icon in the right corner. Clicking on this icon allows the user 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.

The People Widget displays user cards for the Owner and Responsible:

- Owner**: John Smith, 12:13 (Europe / Budapest), English (United States). Contact and Chat options are available.
- Responsible**: Jane Stone, 12:13 (Europe / Budapest), English (United States). Contact and Chat options are available.

Fig. 20: 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. From the *Action* section, it is possible to edit the customer or the customer user. The *Social* section contains links to some social media pages or search engines that are related to the customer user or the customer. Using the icons in the *Create*

Fig. 21: Customer Information Widget

section, it is possible to create any type of ticket. If the customer user is online, the agent can start a chat with the customer user.

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* action. Existing links can also be managed there.

Number	Title	Priority	Created	State	Queue	Linked As	Unlink
2020032510000427	Why am I here?	1 very low	12 days ago	new	Postmaster	Normal	X

Fig. 22: 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* 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* action. Existing links can also be managed there.

**Attachments Widget** This widget can be used to display attachments to the articles. The attachments can be downloaded and, for the images, a preview function is supported.

Linked Knowledge Base Articles (1 Article)						×	+	Select Preset	📄	⚙️
<input type="checkbox"/>	FAQ#	Title	State	Created	Linked As	Unlink				
<input type="checkbox"/>	10002	How to install feature addons	internal (agent)	2 minutes ago	Normal	✕				

Fig. 23: Linked Knowledge Base Articles Widget

Linked Appointments (1 Appointment)							×	+	Select Preset	📄	⚙️
<input type="checkbox"/>	Title	Location	Start Time	End Time	Created	Linked As	Unlink				
<input type="checkbox"/>	Regular meeting	Budapest	04/23/2020 10:00	04/23/2020 12:00	a minute ago	Normal	✕				

Fig. 24: Linked Appointments Widget

### 5.3.2 Ticket Detail View Actions

The following actions are available in the ticket detail view.

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

**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.

**Phone Call Outbound** This action allows agents to add a note about an outgoing phone call to the ticket.

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

**Email Outbound** This action allows agents to send an email and to add the email as an article to the ticket. This screen is very similar to an email client screen.

**SMS Outbound** This action allows agents to send an SMS message and to add the SMS content as an article to the ticket.

---

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

---

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

**Lock or Unlock** 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.

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

Attachments								📄	Select Preset	📄	⚙️
<input type="checkbox"/>	Type	Filename	File size	Create time	Direction	Article	Preview	Download			
<input type="checkbox"/>	📄	inquiry.pdf	8.84 KB	8 minutes ago	↔️	#2 - Important files for the request		📄			
<input type="checkbox"/>	🖼️	product.jpg	291.31 KB	8 minutes ago	↔️	#2 - Important files for the request	🖼️	📄			

Fig. 25: Attachments Widget

COMMUNICATION	MISCELLANEOUS	ORGANIZE	PEOPLE	VIEWS
Note	Lock	Close	Owner	History
Phone Call Outbound	Free Fields	Link	Responsible	
Phone Call Inbound	Merge	Move	Customer	
E-Mail Outbound	Print	Pending		
SMS Outbound	Watch	Priority		
	New Appointment			

Fig. 26: Ticket Detail View Actions

**Merge** This action allows agents to merge one ticket with another ticket.

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

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

**Watch or Unwatch** 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.

**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](#).

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

**Close** This action allows agents to close the ticket.

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

**Move** This action allows agents to change the queue of the ticket. Queues are like folders for tickets. A ticket can belong to only one queue at a time.

**Pending** This action allows agents to set the pending time of the ticket.

**Priority** This action allows agents to change the priority of the ticket.

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

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

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

---

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

---



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

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

**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.

### 5.3.3 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. 27: 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.



## 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.

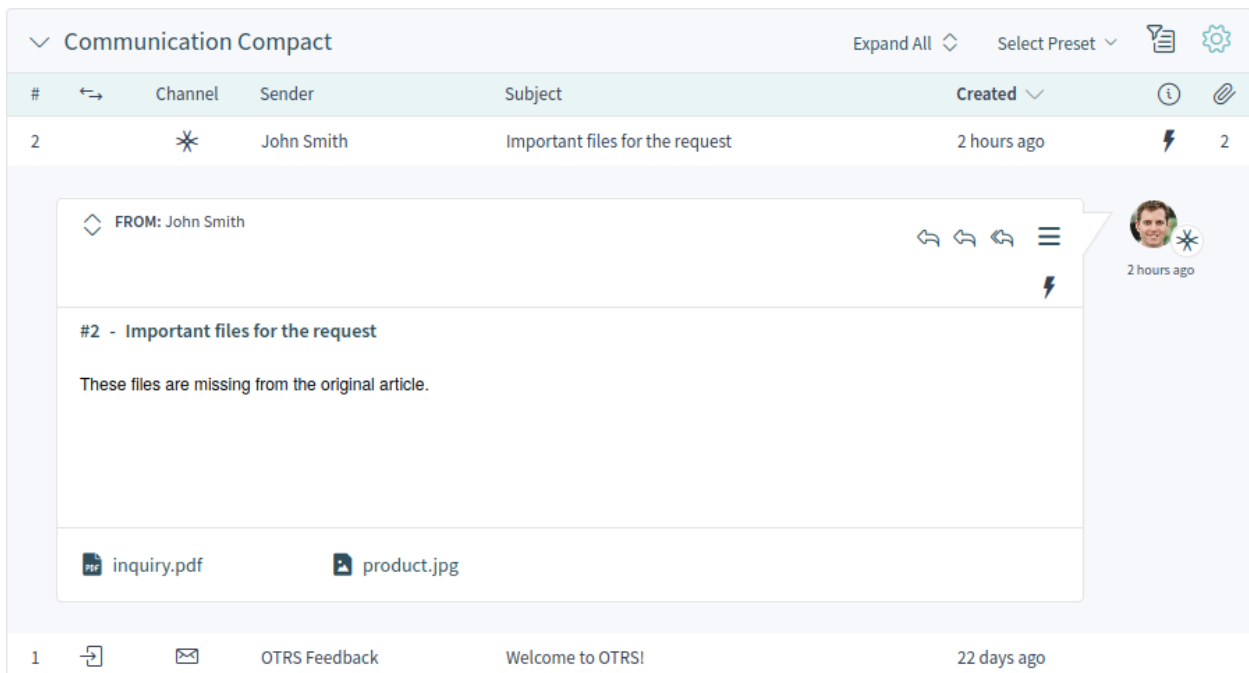


Fig. 1: Expanded Communication Compact Widget

## 6.1 Article Detail View Actions

The following actions are available in the article detail view.

COMMUNICATION	ORGANIZE	VIEW
Reply	Unmark As Important	Copy Article Link
Reply To Note	Print	
Reply to All		

Fig. 2: Article Detail View Actions

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

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

**Reply To Note** This action allows you to reply to an article if the original article is a note. The reply to note screen is very similar to an email client screen.

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

**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).

---

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

---

**Forward** This action allows you to forward the article as an email.

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

**Redirect** 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.

**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 flashing icon in the header.

**Split** 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.

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

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

**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.

---

## Knowledge Base Articles

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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.

### 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 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.

Fig. 1: Create 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.

## 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.

## 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.

FAQ#	Title	Category	Language	State	Validity	Changed
10001	How to use OTRS 8	Software	en	internal (agent)	valid	4 minutes ago

Fig. 2: Knowledge Base Article List

### 7.3.1 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.

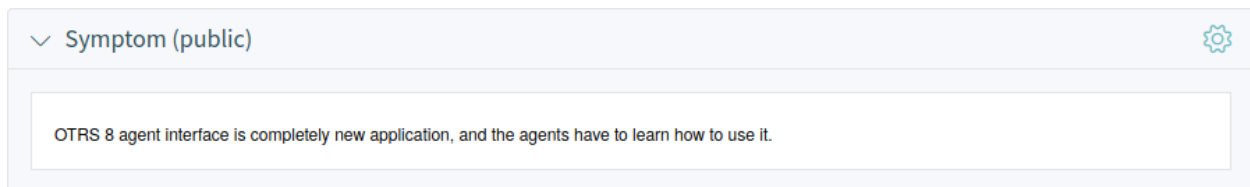


Fig. 3: Symptom Widget

**Problem Widget** This widget can be used to describe the problem itself.

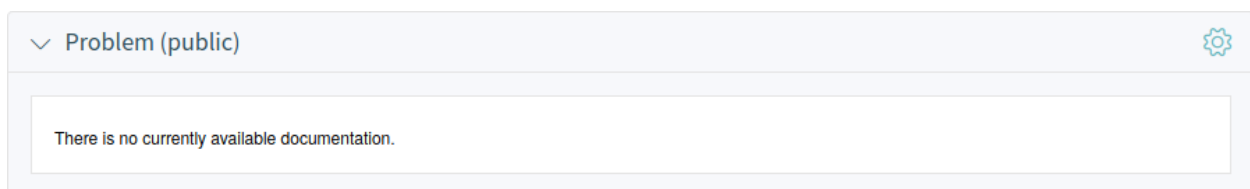


Fig. 4: Problem Widget

**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 you to directly edit the property.

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



Fig. 5: Solution Widget

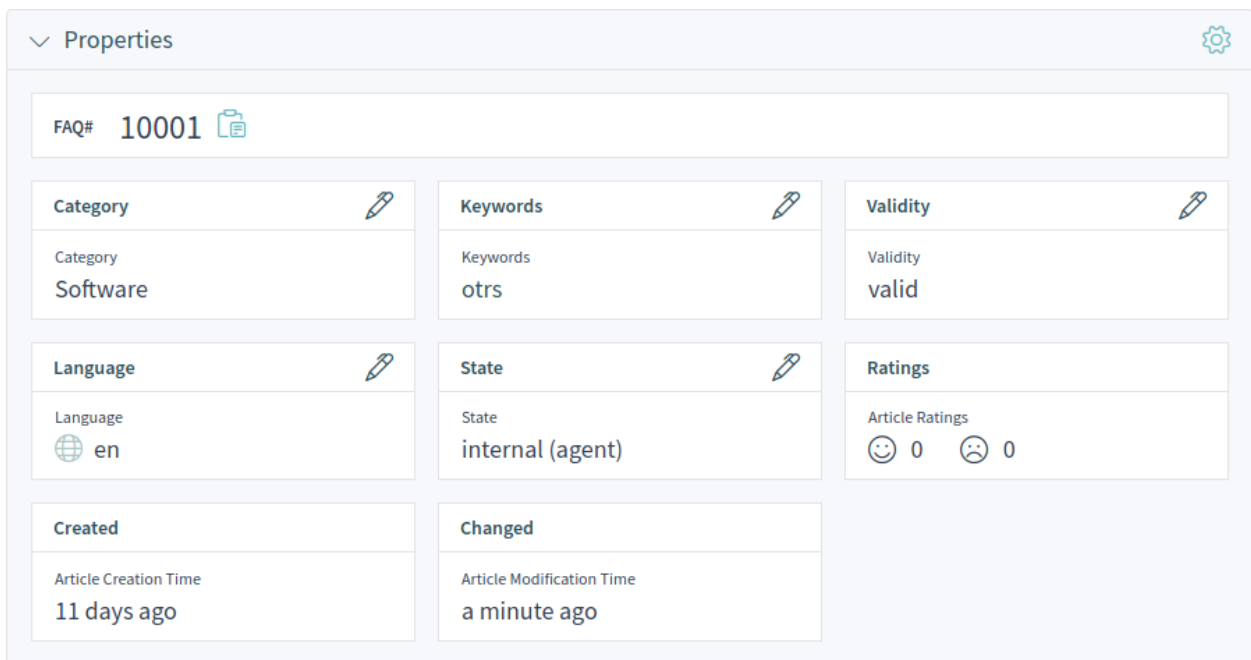


Fig. 6: Properties Widget

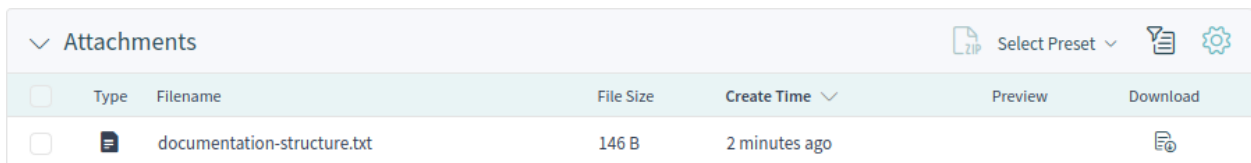


Fig. 7: Attachments Widget



**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.

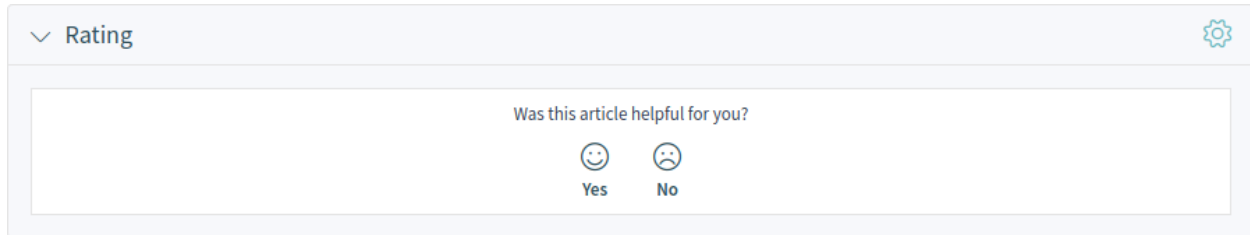


Fig. 8: Rating Widget

**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* action. Existing links can also be managed here.

<input type="checkbox"/>	Number	Title	Priority	Created	State	Queue	Linked As	Unlink
<input type="checkbox"/>	2020032510000427	Why am I here?	1 very low	12 days ago	new	Postmaster	Normal	X

Fig. 9: Linked Tickets Widget

**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* action. Existing links can also be managed here.

<input type="checkbox"/>	FAQ#	Title	State	Created	Linked As	Unlink
<input type="checkbox"/>	10002	How to install feature addons	internal (agent)	2 minutes ago	Normal	X

Fig. 10: Linked Knowledge Base Articles Widget

**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* action. Existing links can also be managed here.

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

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

### 7.3.2 Knowledge Base Article Detail View Actions

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

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

Linked Appointments (1 Appointment)							✕ +	Select Preset ▾	📄 ⚙️
<input type="checkbox"/>	Title	Location	Start Time	End Time	Created ▾	Linked As	Unlink		
<input type="checkbox"/>	Regular meeting	Budapest	04/23/2020 10:00	04/23/2020 12:00	a minute ago	Normal	✕		

Fig. 11: Linked Appointments Widget

Comment (internal) ⚙️

---

The following chapters are finished:

- Navigation And Usage
- Personalization

Fig. 12: Comment Widget

People ⚙️

**Created By**

**John Smith**  
 13:55 (Europe / Budapest)  
 English (United States)

Contact 
Chat

**Changed By**

**John Smith**  
 13:55 (Europe / Budapest)  
 English (United States)

Contact 
Chat

Fig. 13: People Widget

**ORGANIZE**

**VIEWS**

**Edit**

**History**

**Link**

**Print**

**Delete**

Fig. 14: Knowledge Base Article Detail View Actions

**Edit** 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** This action allows you to link other business objects to the knowledge base article.

**Delete** 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:

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



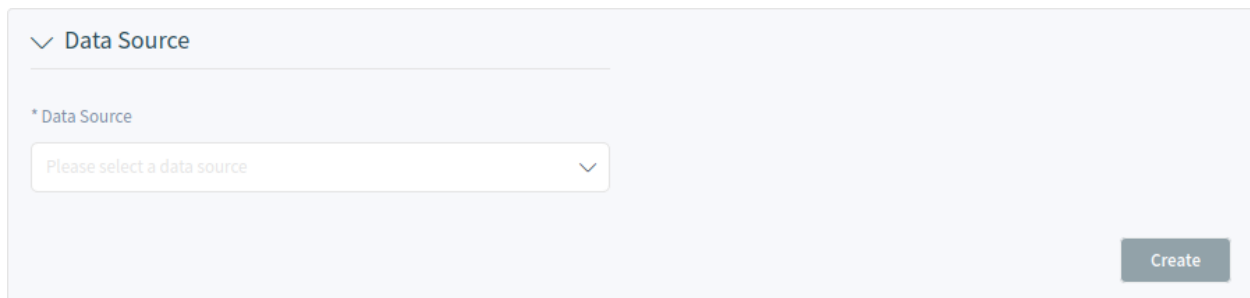
Customers in **OTRS** are organizations, companies or authorities. The real users are called *Customer Users*. A fresh OTRS installation contains no customers by default.

## 8.1 Create Customer

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

To add a customer:

1. Choose a data source.



The screenshot shows a form titled "Data Source" with a dropdown menu. The dropdown menu is currently empty and displays the text "Please select a data source". To the right of the dropdown menu is a "Create" button.

Fig. 1: 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.

<p>∨ Data Source</p> <hr/> <p>* Data Source</p> <p>Database Backend ∨</p>	<p>∨ Miscellaneous</p> <hr/> <p>URL</p> <p>Comment</p>
<p>∨ Customer Information</p> <hr/> <p>* Customer</p> <p>* CustomerID</p> <p>* Valid</p> <p>valid ∨</p>	
<p>∨ Address</p> <hr/> <p>Street</p> <p>Zip</p> <p>City</p> <p>* Country</p> <p>Select... ∨</p>	
<p>Create</p>	

Fig. 2: 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, the address information of 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.

## 8.2 Customer List

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

CustomerID	Customer ^	City	Validity	Open	Closed	Edit
supersupport	Super Support Inc.	Miami	valid	3	0	

Fig. 3: Customer List

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 the customer 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.

## 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.

### 8.3.1 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.

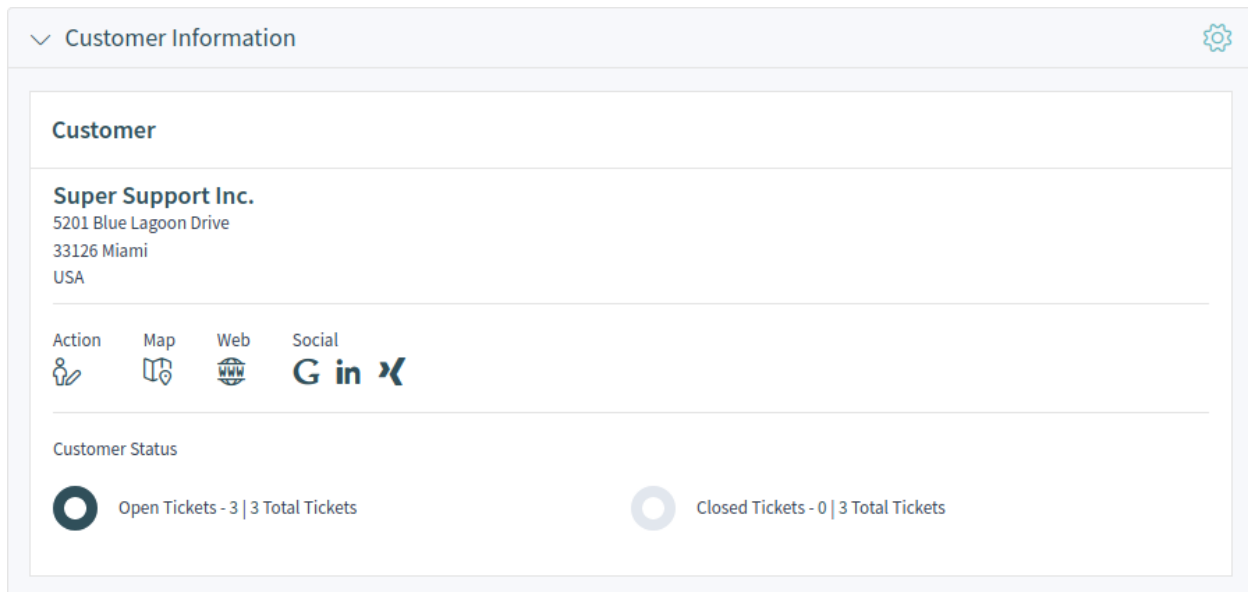


Fig. 4: Customer Information Widget

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 date/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.

**Reminders Widget** This widget lists the customer's pending tickets. Pending tickets are set for work at a later date/time by the agent. The reminder time is going to expire soon.

Clicking on a ticket opens the ticket detail view.

**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.





Escalations					Select Preset		
Number	Title	Priority	Created	Escalation Time			
Currently no data available.							

Fig. 5: Escalations Widget



Reminders							Select Preset			
Number	Title	Priority	Created	State	Pending till					
Currently no data available.										

Fig. 6: Reminders 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 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.

### 8.3.2 Customer Detail View Actions

The following actions are available in the customer detail view.

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

**Edit** This action allows an 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.



Open Tickets (3 Tickets)					Select Preset		
Number	Title	Priority	Created	State			
2020032510000409	Re: subject alalal 1234	5 very high	26 days ago	new			
2020032510000374	Good morning!	3 normal	26 days ago	new			
2015071510123456	Welcome to OTRS!	3 normal	26 days ago	new			

Fig. 7: Open Tickets Widget

Customer Users (2 Customer Users)										Select Preset		
Username	Firstname	Lastname ^	Email	CustomerID	Validity	Open	Closed	Chat	Create	Edit		
laceygreen	Lacey	Green	lacey@example.org	supersupport	valid	3	0					
robertmeyer	Robert	Meyer	robert@example.org	supersupport	valid	0	0					

Fig. 8: Customer Users Widget

Ticket List (3 Tickets)										Select Preset		
Title	Priority	Created ^	State	Sender	Lock	Queue	Owner	Customer ID	Watch			
Re: subject alalal 1234	5 very high	26 days ago	new	871@example-service.com	locked	Postmaster	John Smith	supersupport				
Good morning!	3 normal	26 days ago	new	632@fast-company-example-sales.com	locked	Junk	John Smith	supersupport				
Welcome to OTRS!	3 normal	26 days ago	new	OTRS Feedback	unlocked	Raw	John Smith	supersupport				

Fig. 9: Ticket List Widget

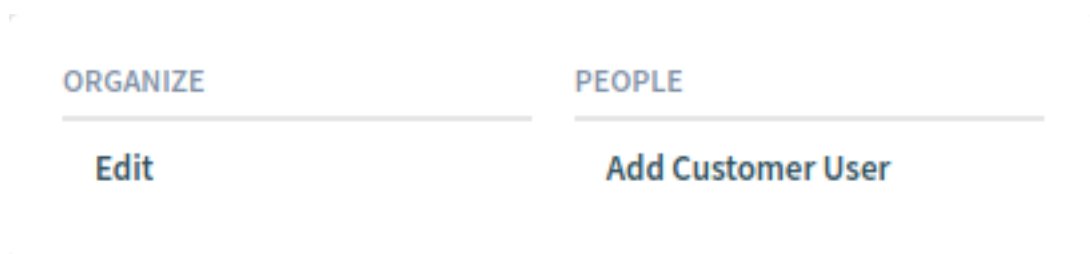


Fig. 10: Customer Detail View Actions

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.

## 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

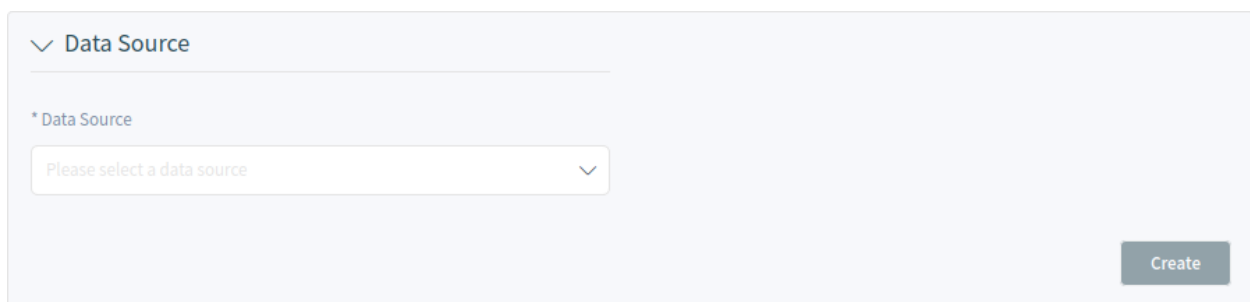

The image shows a user interface for selecting a data source. At the top, there is a section header 'Data Source' with a downward-pointing chevron icon. Below this, there is a label '\* Data Source' indicating a mandatory field. The field itself is a dropdown menu with the text 'Please select a data source' and a small downward-pointing chevron icon on the right. In the bottom right corner of the form area, there is a grey button labeled 'Create'.

Fig. 1: 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, select the data source for storing customer users. Multiple data sources are supported, including external data sources like LDAP.

<p>∨ Data Source</p> <hr/> <p>* Data Source</p> <p>Database Backend</p>	<p>∨ Security</p> <hr/> <p>* Login Forbidden </p> <p>No</p>
<p>∨ Personal Information</p> <hr/> <p>Title or salutation</p> <p></p> <p>* Firstname</p> <p></p> <p>* Lastname</p> <p></p> <p>* Email</p> <p></p> <p>* CustomerID</p> <p></p> <p>Phone</p> <p></p> <p>Fax</p> <p></p> <p>Mobile</p> <p></p>	<p>∨ Miscellaneous</p> <hr/> <p>Comment</p> <p></p>
<p>∨ Address</p> <hr/> <p>Street</p> <p></p> <p>Zip</p> <p></p> <p>City</p> <p></p> <p>Country</p> <p></p>	
<p>∨ Login Credentials</p> <hr/> <p>* Username</p> <p></p>	

---

**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.

**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** \* Sets the validity of this customer user. Each customer user record can be used in OTRS only when 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.

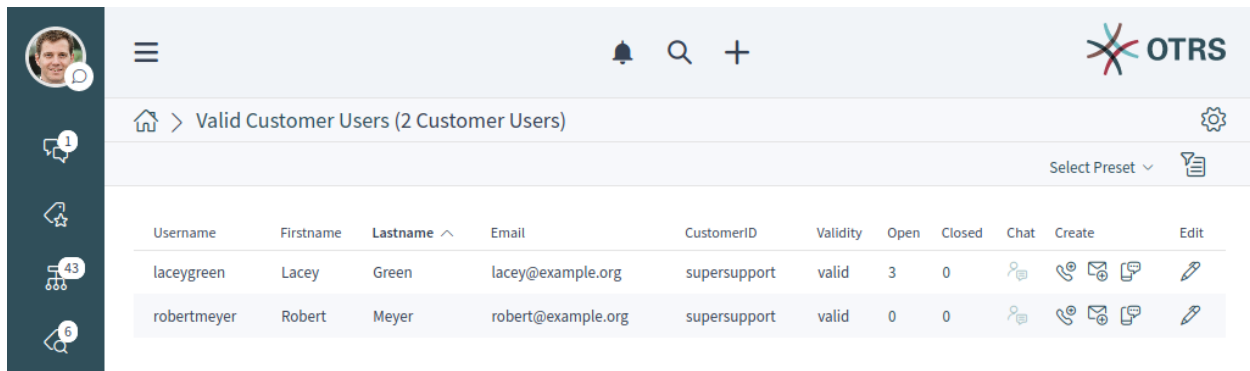
**Miscellaneous** In this section, additional information for the customer user can be added.

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

## 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.

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.



Username	Firstname	Lastname	Email	CustomerID	Validity	Open	Closed	Chat	Create	Edit
laceygreen	Lacey	Green	lacey@example.org	supersupport	valid	3	0			
robertmeyer	Robert	Meyer	robert@example.org	supersupport	valid	0	0			

Fig. 3: Customer User List

It is possible to preview the customer user 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.

## 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.

### 9.3.1 Customer User Detail View Widgets

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

**Customer Information Widget** This widget shows information about the customer user and about its customer.

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

**Escalations Widget** This widget lists the escalated tickets that are related to this customer user. Escalated tickets are tickets that remain open after the time that was set by the customer user's service level agreement; therefore the ticket needs to be worked on immediately.

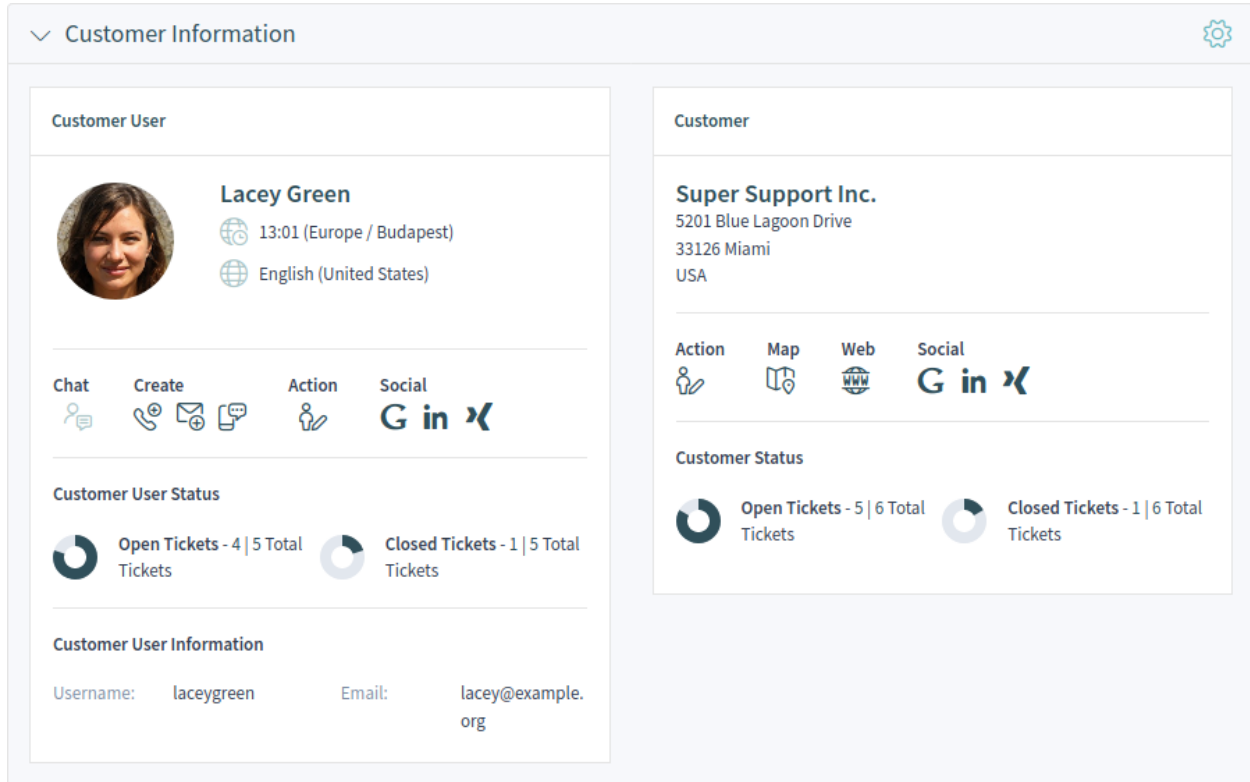
Clicking on a ticket opens the ticket detail view.

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

Clicking on a ticket opens the ticket detail view.

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

Clicking on a ticket opens the ticket detail view.



The Customer Information Widget displays details for a customer user and the customer organization. It includes a profile picture, name, location, and language for the user, along with contact information and social media links for the customer. It also features status indicators for open and closed tickets.

**Customer Information**

**Customer User**

**Lacey Green**  
 13:01 (Europe / Budapest)  
 English (United States)

**Customer**

**Super Support Inc.**  
 5201 Blue Lagoon Drive  
 33126 Miami  
 USA

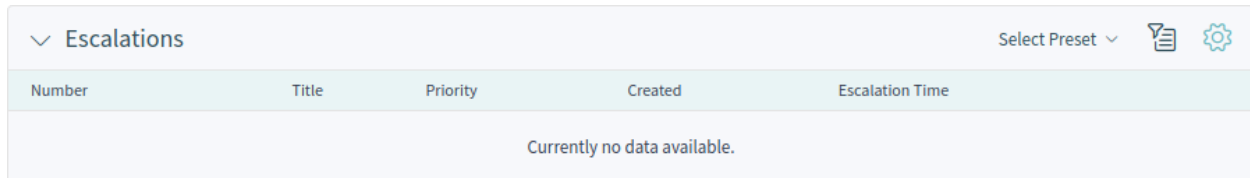
**Customer User Status**

Open Tickets - 4 | 5 Total Tickets  
 Closed Tickets - 1 | 5 Total Tickets

**Customer User Information**

Username: laceygreen      Email: lacey@example.org

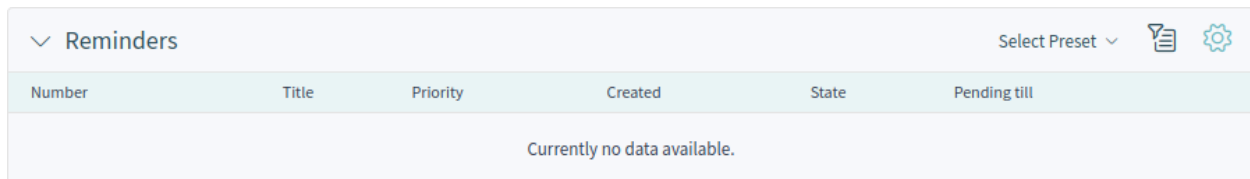
Fig. 4: Customer Information Widget



The Escalations Widget displays a table of escalation records. The table has columns for Number, Title, Priority, Created, and Escalation Time. The current view shows no data available.

Number	Title	Priority	Created	Escalation Time
Currently no data available.				

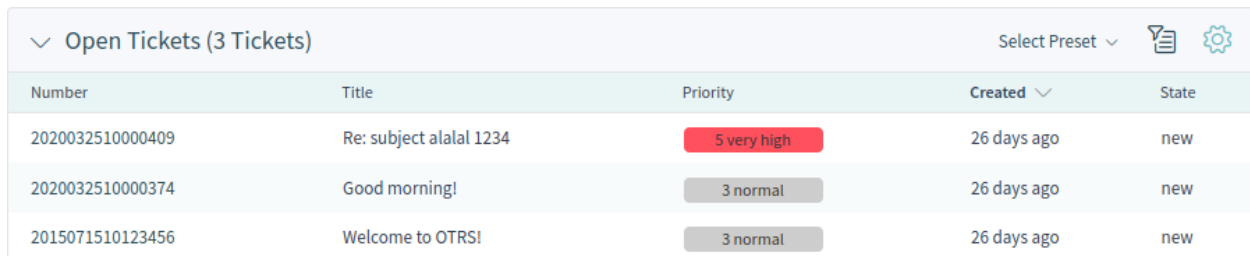
Fig. 5: Escalations Widget



The Reminders Widget displays a table of reminder records. The table has columns for Number, Title, Priority, Created, State, and Pending till. The current view shows no data available.

Number	Title	Priority	Created	State	Pending till
Currently no data available.					

Fig. 6: Reminders Widget



The Open Tickets Widget displays a table of open tickets. The table has columns for Number, Title, Priority, Created, and State. The current view shows 3 tickets.

Number	Title	Priority	Created	State
2020032510000409	Re: subject alalal 1234	5 very high	26 days ago	new
2020032510000374	Good morning!	3 normal	26 days ago	new
2015071510123456	Welcome to OTRS!	3 normal	26 days ago	new

Fig. 7: Open Tickets Widget

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

Clicking on a ticket opens the ticket detail view.

Ticket List (3 Tickets)										Select Preset		
Title	Priority	Created	State	Sender	Lock	Queue	Owner	Customer ID	Watch			
Re: subject alalal 1234	5 very high	26 days ago	new	871@example-service.com	locked	Postmaster	John Smith	supersupport				
Good morning!	3 normal	26 days ago	new	632@fast-company-example-sales.com	locked	Junk	John Smith	supersupport				
Welcome to OTRS!	3 normal	26 days ago	new	OTRS Feedback	unlocked	Raw	John Smith	supersupport				

Fig. 8: Ticket List Widget

### 9.3.2 Customer User Detail View Actions

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

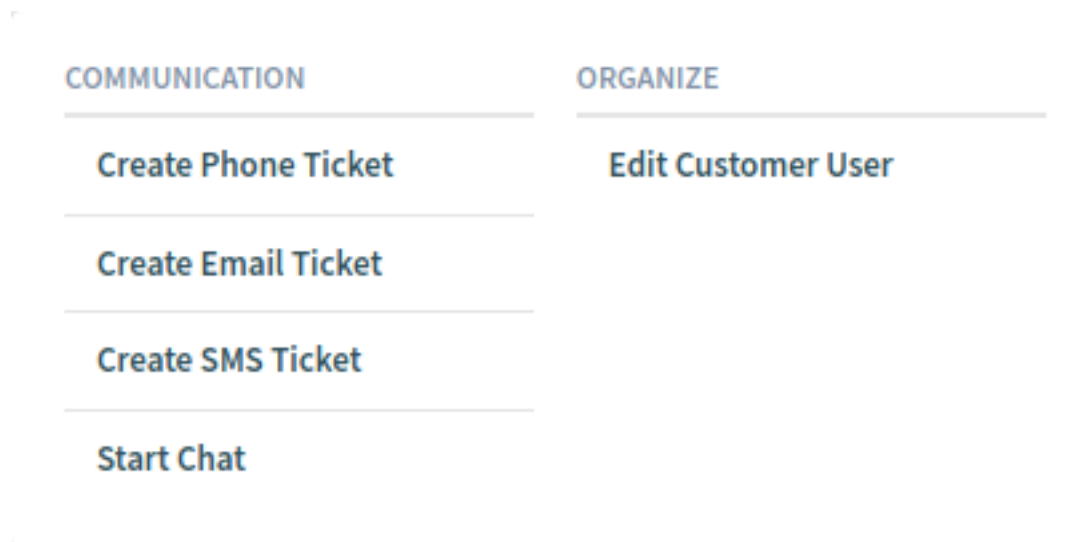


Fig. 9: Customer User Detail View Actions

**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.



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

**Edit Customer User** This action allows you 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.

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**Note:** This action is not enabled by default.

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## Notifications

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**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. 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.

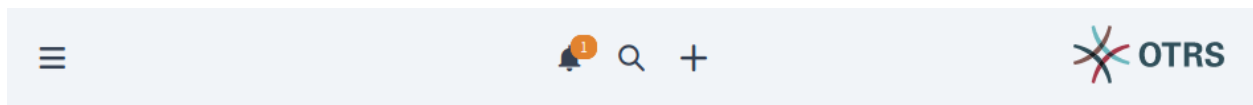


Fig. 1: New Notification Received

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

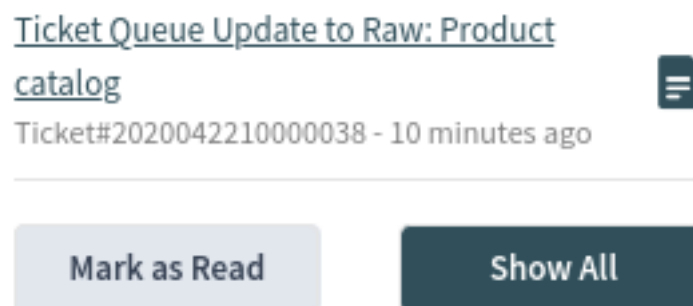


Fig. 2: Notification Popup

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	  

Fig. 3: Ticket Notifications Widget

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

## 10.1 Notification List

The notification list shows the ticket notifications and appointment notifications.

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

### 10.1.1 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.

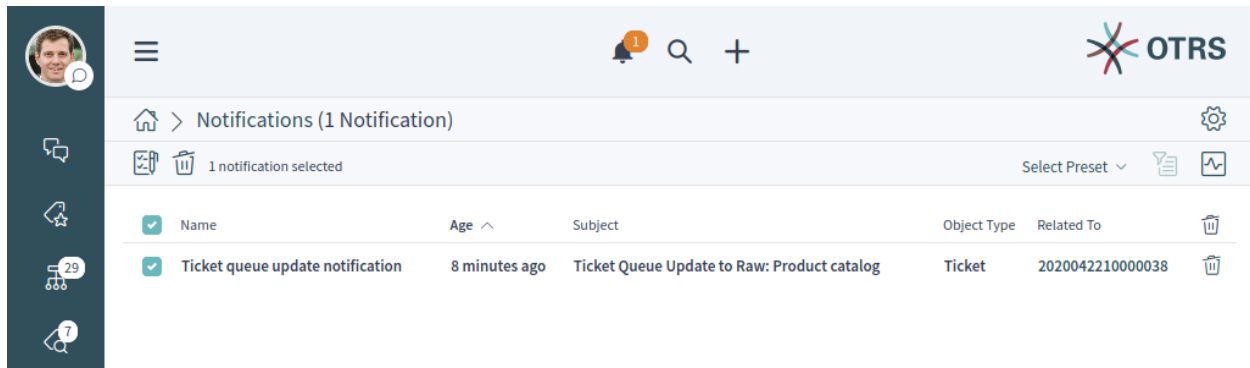


Fig. 4: Notification List

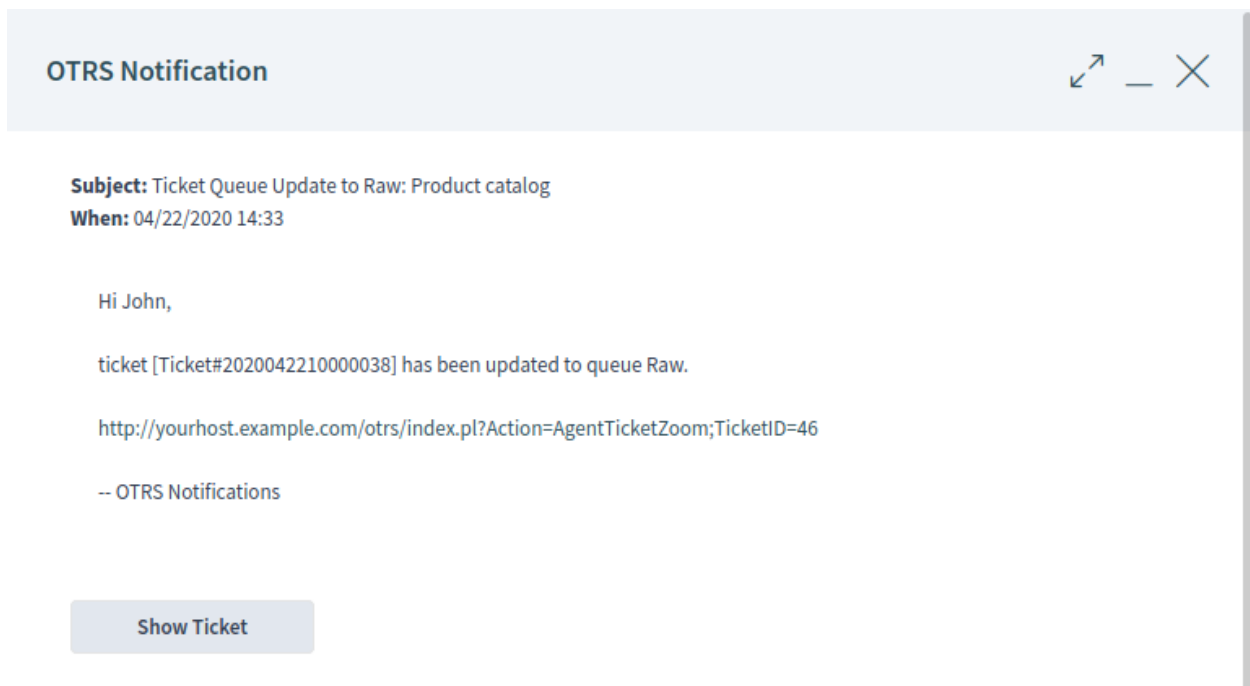


Fig. 5: Notification Details

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.

**Warning:** The notifications will be deleted without confirmation.

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## Statistics and Reports

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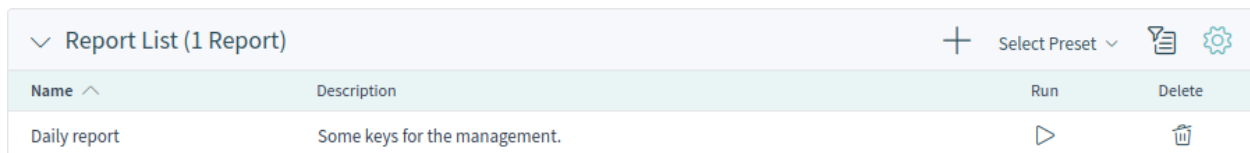
This screen acts as a dashboard for statistics and reports.

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

---

### 11.1 Reports

Reports are automatically generated statistics. In this widget, it is possible to set statistics as reports.



Report List (1 Report)		+	Select Preset ▾	📄	⚙️
Name ^	Description	Run	Delete		
Daily report	Some keys for the management.	▶	🗑️		

Fig. 1: 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** only if this field is set to *valid*. Setting this field to *invalid* or *invalid-temporarily* will disable the use of the report.

**General Settings**

---

\* Name

Please enter a name

\* Description

Please enter a description

**Validity**

valid  invalid  invalid-temporarily


Fig. 2: General Report Information

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.
  - 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.
  - 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.



## Automatic Generation Settings

No schedule  
 Basic schedule  
 Custom schedule

Automatic Generation Language 

English (United States) ✕ ▾

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. 3: Automatic Generation Settings

## Output Settings

---

Headline

Title

Caption for Preamble

Preamble

Caption for Epilogue

Epilogue

Fig. 4: Output Settings

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.

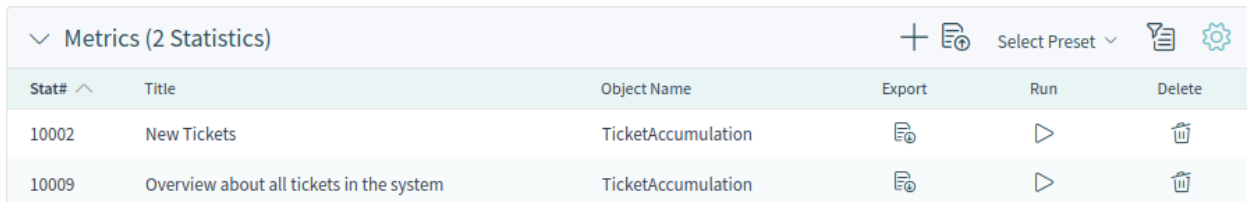
To delete a report:

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

## 11.2 Statistics

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

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



Metrics (2 Statistics)					
Stat# ^	Title	Object Name	Export	Run	Delete
10002	New Tickets	TicketAccumulation			
10009	Overview about all tickets in the system	TicketAccumulation			

Fig. 5: Metrics Widget

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

**Static Widget** This widget list the static statistics.

Creating a new statistic requires some steps.

1. Click on the + icon in the header of any statistic widget. A new screen will be displayed for the statistic creation.
2. Select the statistic type. The statistic can be *Matrix*, *List* or *Static*.
  - Matrix: Each cell contains a single data point.
  - List: Each row contains data of one entity.
  - Static: Non-configurable complex statistics.
3. Fill in the general information for the statistic.

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

**Description \*** Longer description about the statistic.

Lists (8 Statistics)					
Stat#	Title	Object Name	Export	Run	Delete
10001	List of tickets closed last month	Ticketlist			
10003	List of open tickets, sorted by time left until response deadline expires	Ticketlist			
10004	List of tickets closed, sorted by response time.	Ticketlist			
10005	List of tickets created last month	Ticketlist			
10006	List of the most time-consuming tickets	Ticketlist			
10007	List of open tickets, sorted by time left until escalation deadline expires	Ticketlist			
10008	List of tickets closed, sorted by solution time	Ticketlist			
10010	List of open tickets, sorted by time left until solution deadline expires	Ticketlist			

Fig. 6: Lists Widget

Static (1 Statistic)					
Stat#	Title	Object Name	Export	Run	Delete
10011	Changes of status in a monthly overview	StateAction			

Fig. 7: Static Widget

Please select your statistic type

**Matrix**

Each cell contains a singular data point.

**List**

Each row contains data of one entry.

**Static**

Non-configurable complex statistics

Fig. 8: Statistic Type Selection

General


---


\* Title

\* Description




\* Object


Ticketlist

\* Permissions 


stats 


\* Format


Print  CSV  Excel 

\* Time Zone 

UTC

Create summation row 

Create summation column 

Valid 

**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.

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

This field is not available for static statistics.

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

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

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

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

5. Select the values for the X-axis.

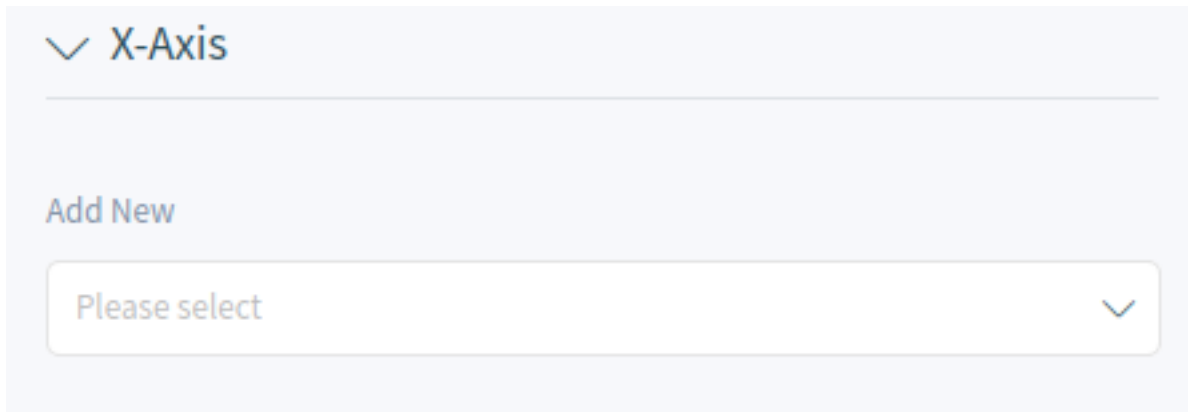


Fig. 10: Configure X-Axis

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 the statistic type.

5. Select the values for the Y-axis.

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

The available values depend on the the statistic type.

6. Select the filters for the data.

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

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

---

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

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Y-Axis

---

Add New

Please select ▼

Fig. 11: Configure Y-Axis

Filter

---

Add New

Please select ▼

Fig. 12: Add Filters

## Preview Statistic

Preview Type

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

Szám	Cím	Lezárás ideje	Ügyfél-azc
1	Test ticket		stark-indu
2	Explanation for vacation days		stark-indu
3	Welcome to OTRS!		
4	Test ticket 1		stark-indu
5	Attachment test		stark-indu

Fig. 13: Statistic Preview Widget



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:

1. Select a statistic in any statistic widget.
2. Modify the fields.
3. Click on the *Save* or *Save and Close* button.

To export a statistic:

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

To import a statistic:

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

To run a statistic immediately:

1. Click on the play icon in the *Run* column.
2. Click on the *Run Statistic* button in the new screen.

To delete a statistic:

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



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## Calendar Overview

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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.

### 12.1 Calendar Widgets

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

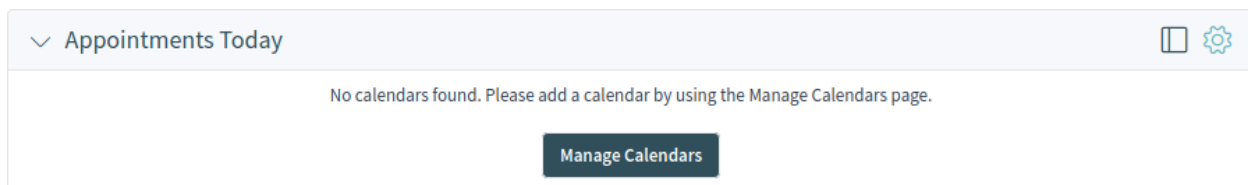


Fig. 1: No Calendars Found

---

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.

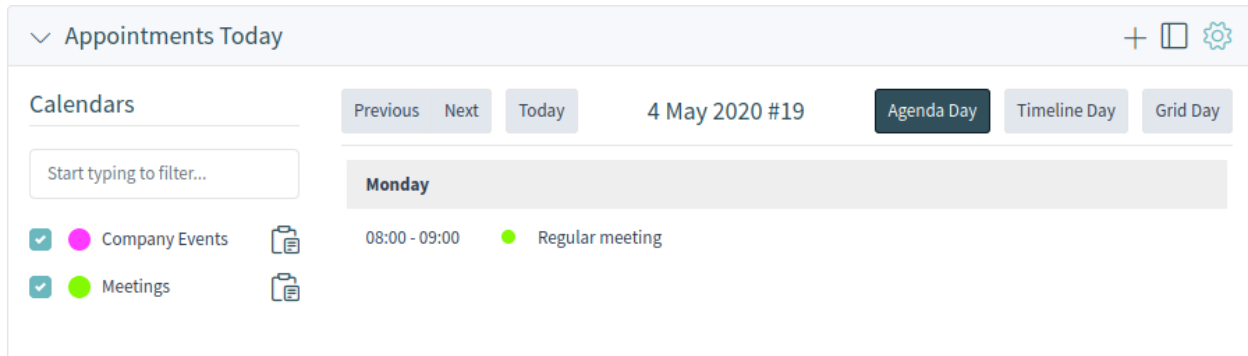


Fig. 2: Appointments Today Widget

**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.
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.

Appointments This Week + □ ⚙

Calendars

Start typing to filter...

Company Events 

Meetings 

Previous Next Today 4 – 10 May 2020 #19 **Agenda Week** Timeline Week Grid Week

<b>Monday</b>		<b>May 4, 2020</b>
08:00 - 09:00	● Regular meeting	
<b>Tuesday</b>		<b>May 5, 2020</b>
08:00 - 09:00	● Regular meeting	
<b>Wednesday</b>		<b>May 6, 2020</b>
08:00 - 09:00	● Regular meeting	
<b>Thursday</b>		<b>May 7, 2020</b>
08:00 - 09:00	● Regular meeting	
<b>Friday</b>		<b>May 8, 2020</b>
08:00 - 09:00	● Regular meeting	
<b>Saturday</b>		<b>May 9, 2020</b>
08:00 - 09:00	● Regular meeting	
<b>Sunday</b>		<b>May 10, 2020</b>
08:00 - 09:00	● Regular meeting	

Fig. 3: Appointments This Week Widget

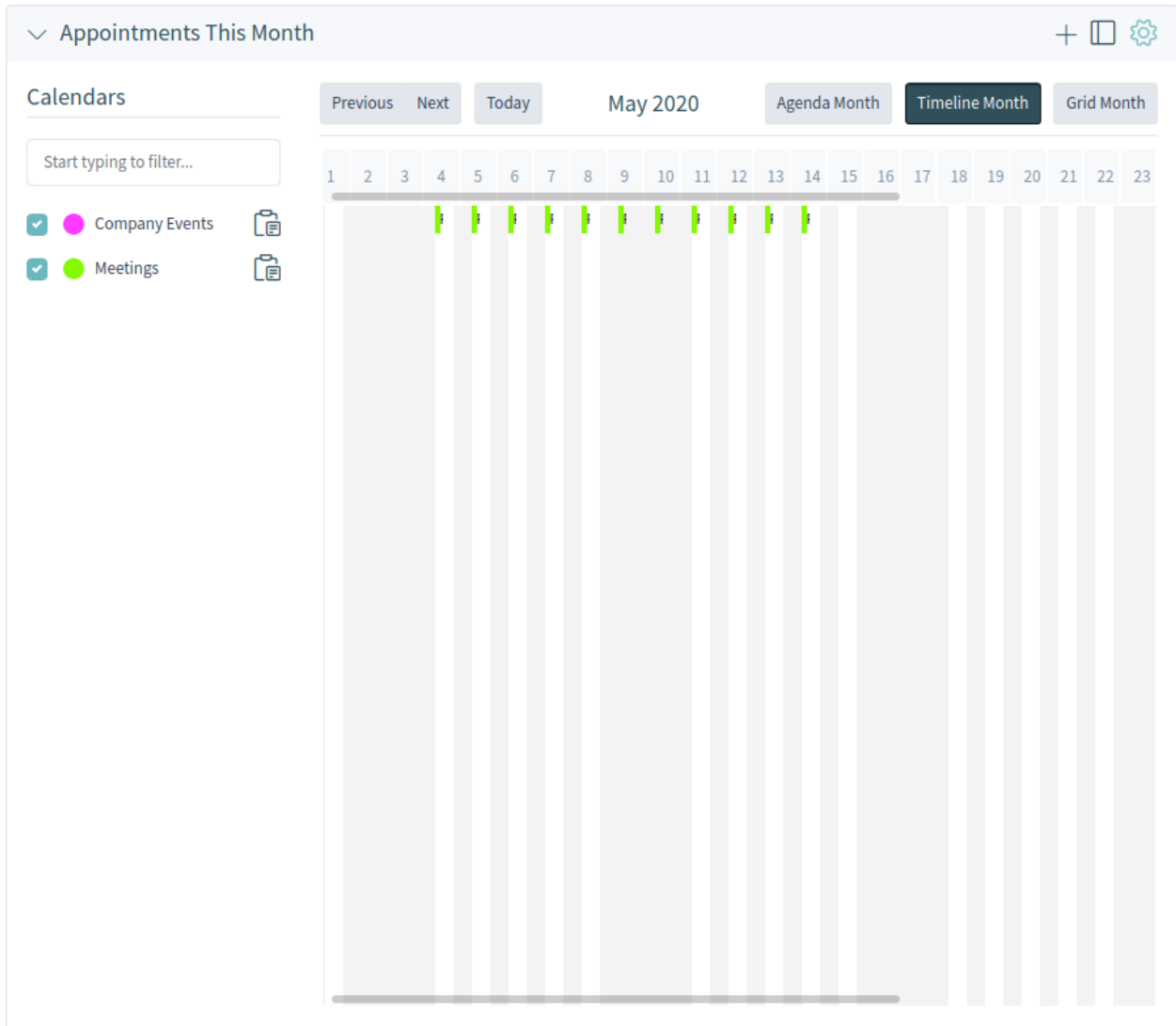


Fig. 4: Appointments This Month Widget

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.

## 12.2 Add Appointment

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

### 12.2.1 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](mailto: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.

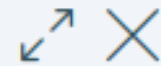
**Repeat \*** Define recurring appointments. This is described separately, see *Repeating Appointments* below.

**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.

## Add Appointment



### Basic Information

\* Calendar

\* Title

Description

Location



### Resource

This feature is currently not available.

Install OTRS resource management to use this feature.

### Date & Time

 All day

\* Start Date



**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.

## 12.2.2 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.

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.

## ▼ Date & Time

---

All day

\* Start Date



\* End Date



\* Repeat



Frequency



Every



Limit



Until





Fig. 6: Repeating Appointments

Appointments This Week + □ ⚙

Calendars

Start typing to filter...



Company Events 

Meetings 

Previous Next Today 4 – 10 May 2020 #19 **Agenda Week** Timeline Week Grid Week

<b>Monday</b>	May 4, 2020
08:00 - 09:00	● Regular meeting
<b>Tuesday</b>	May 5, 2020
08:00 - 09:00	● Regular meeting
<b>Wednesday</b>	May 6, 2020
08:00 - 09:00	● Regular meeting
<b>Thursday</b>	May 7, 2020
08:00 - 09:00	● Regular meeting
<b>Friday</b>	May 8, 2020
08:00 - 09:00	● Regular meeting
<b>Saturday</b>	May 9, 2020
08:00 - 09:00	● Regular meeting
<b>Sunday</b>	May 10, 2020
08:00 - 09:00	● Regular meeting


Fig. 7: Repeating Appointments Overview

Regular meeting  

### Basic Information

---


Location

Budapest 

Description

Regular daily meeting to discuss the daily tasks.

Calendar

 Meetings

### Date & Time

---

Start Date

05/06/2020 08:00

End Date

05/06/2020 09:00

Fig. 8: Repeating Appointments Details

This is a repeating appointment

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

**Cancel**      **Just This Occurrence**      **All Occurrences**

Fig. 9: Edit Repeating Appointment



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*.

## 13.1 Chat Availability

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

The *People* widget shows the online and chat availability status for agents and customer users. A third screen shows users that are out of office.

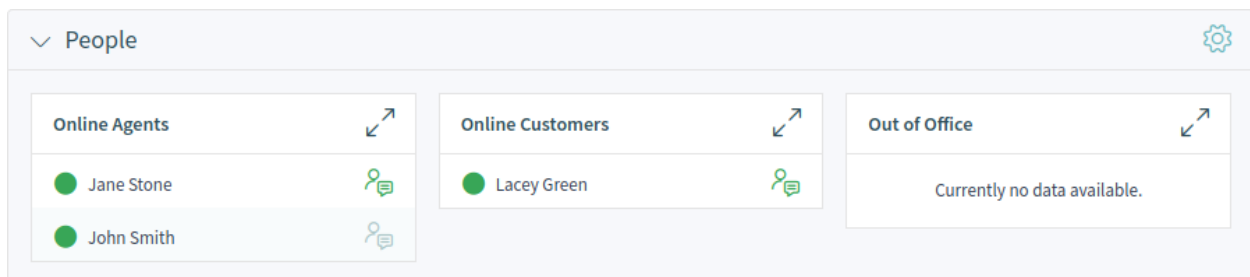


Fig. 1: People Widget

Every user has a colored circle icon after his/her name in the *People* widget which represents the person's availability.

**Green circle** The user is online and available for chats.

**Yellow circle** The user is away. There has not been a request sent to the server from this user for some time.

**Pink circle** The user is inactive. A chat request has not been accepted or the participant left the chat.

**Red circle** The user is set as unavailable for chats in the *Personalization* menu.

**Black circle** The user has logged out or the session has expired.

## 13.2 Chat Request List

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

Created	Type	Requester	Name	Channel	Description	Action
9 minutes ago	Request	Customer	Lacey Green	Sales	I have a question	Accept

Fig. 2: Chat Request List

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

## 13.3 Start New Chat

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

### 13.3.1 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.



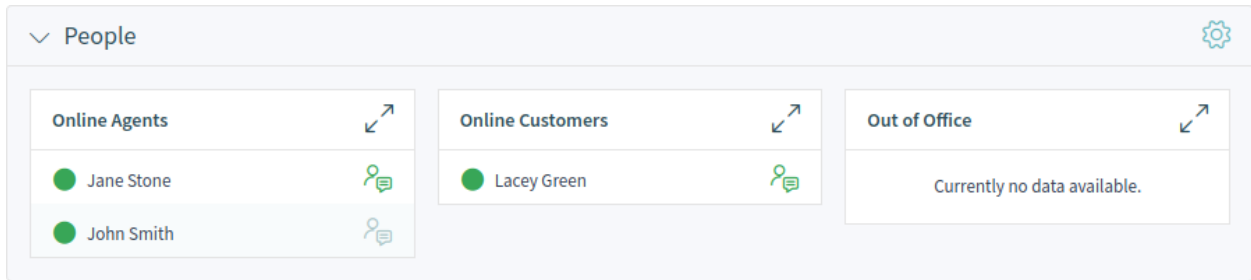


Fig. 3: Available Agents

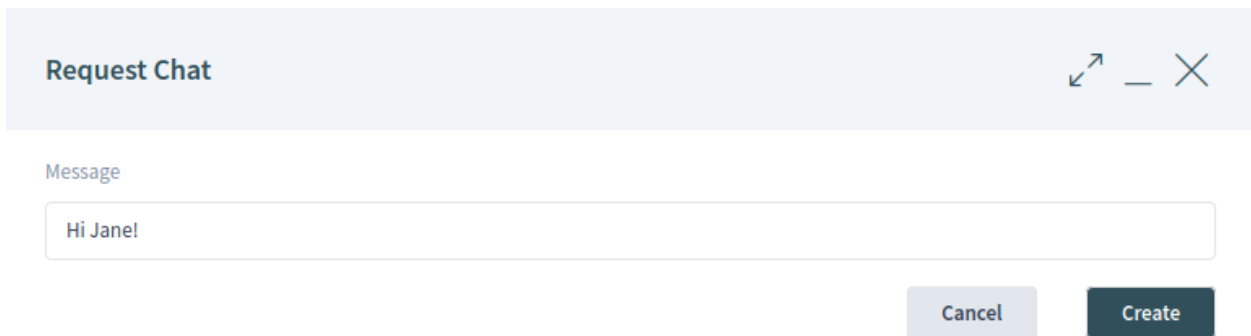


Fig. 4: Request Chat Dialog

4. After the chat request has been sent to the other agent, you will see a chat indicator in the organizer sidebar. A browser notification is displayed to inform the other agent of the chat request.
5. Wait for the answer. The other agent has to accept the chat request with the *Accept* button.
6. When the other agent accepts the chat request, you can chat now.

### 13.3.2 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's user name.
3. Type an initial message in the *Request Chat* dialog, and click on the *Create* button to send the message.
4. After the chat request has been sent to the customer user, a chat indicator will appear in the organizer sidebar. A browser notification is displayed to inform the customer user about the request.
5. Wait for the answer. The customer user has to accept the chat request which is displayed in the bottom right corner of the external interface.
6. When the customer user accepts the chat request, you can chat now.
7. When the customer user closes the chat, it is possible to send the chat contents via email or create a ticket from the conversation.

### 13.3.3 Customer User to Agent

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

To receive a chat request from a customer user:

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

### 13.3.4 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.

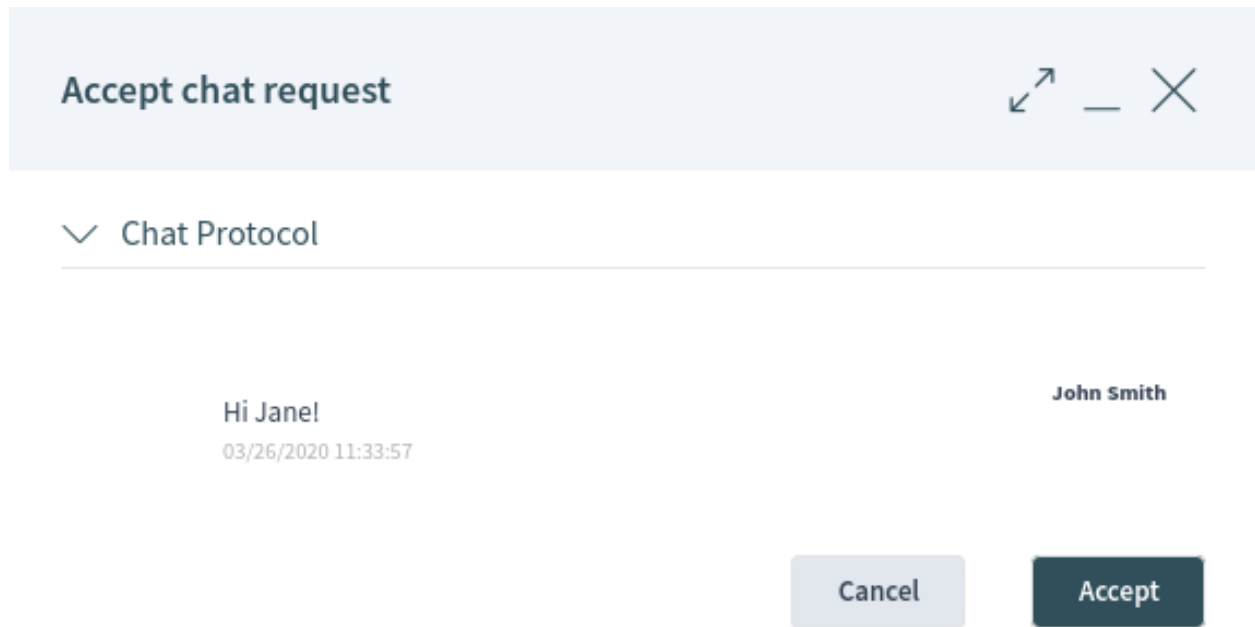


Fig. 5: Accept Chat Request Dialog



Fig. 6: Agent to Agent Chat

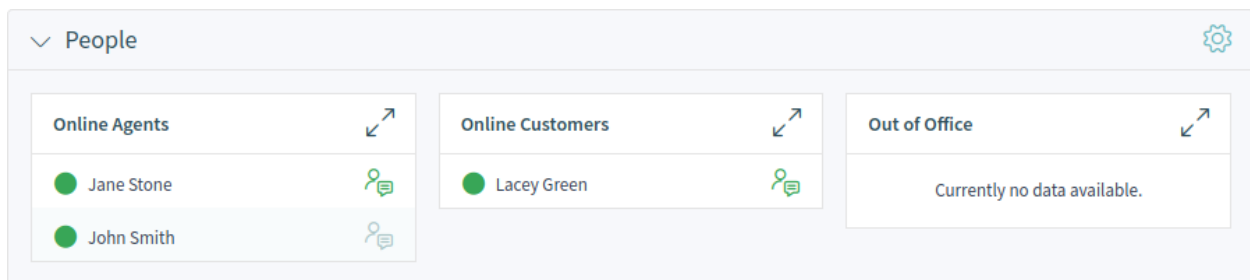


Fig. 7: Available Customer Users

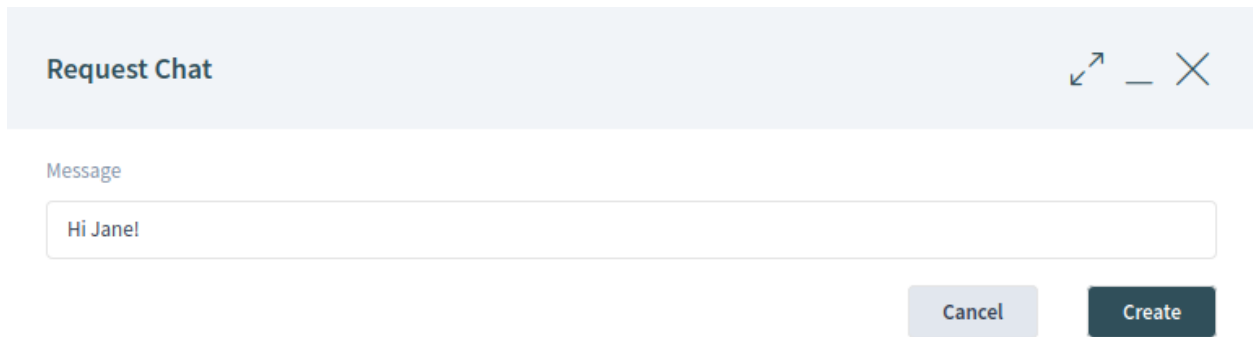


Fig. 8: Request Chat Dialog

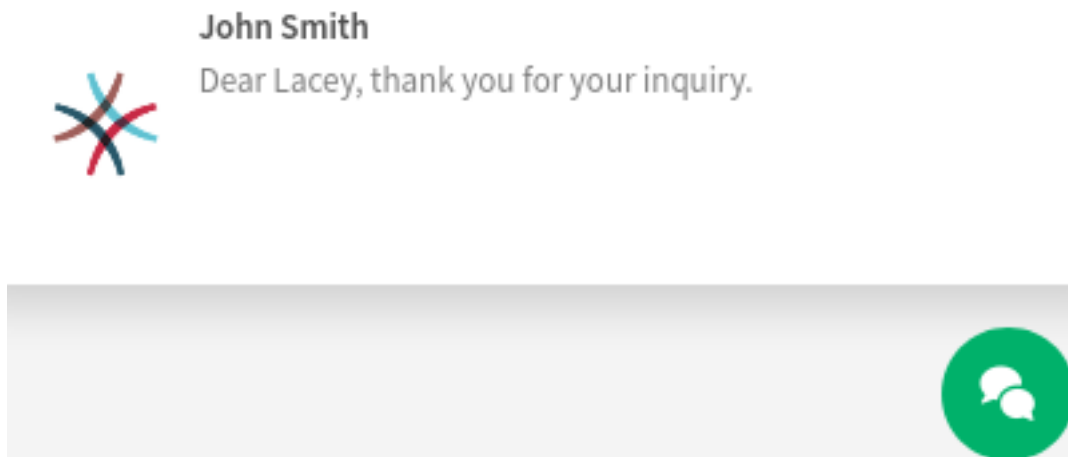


Fig. 9: Chat Request on External Interface

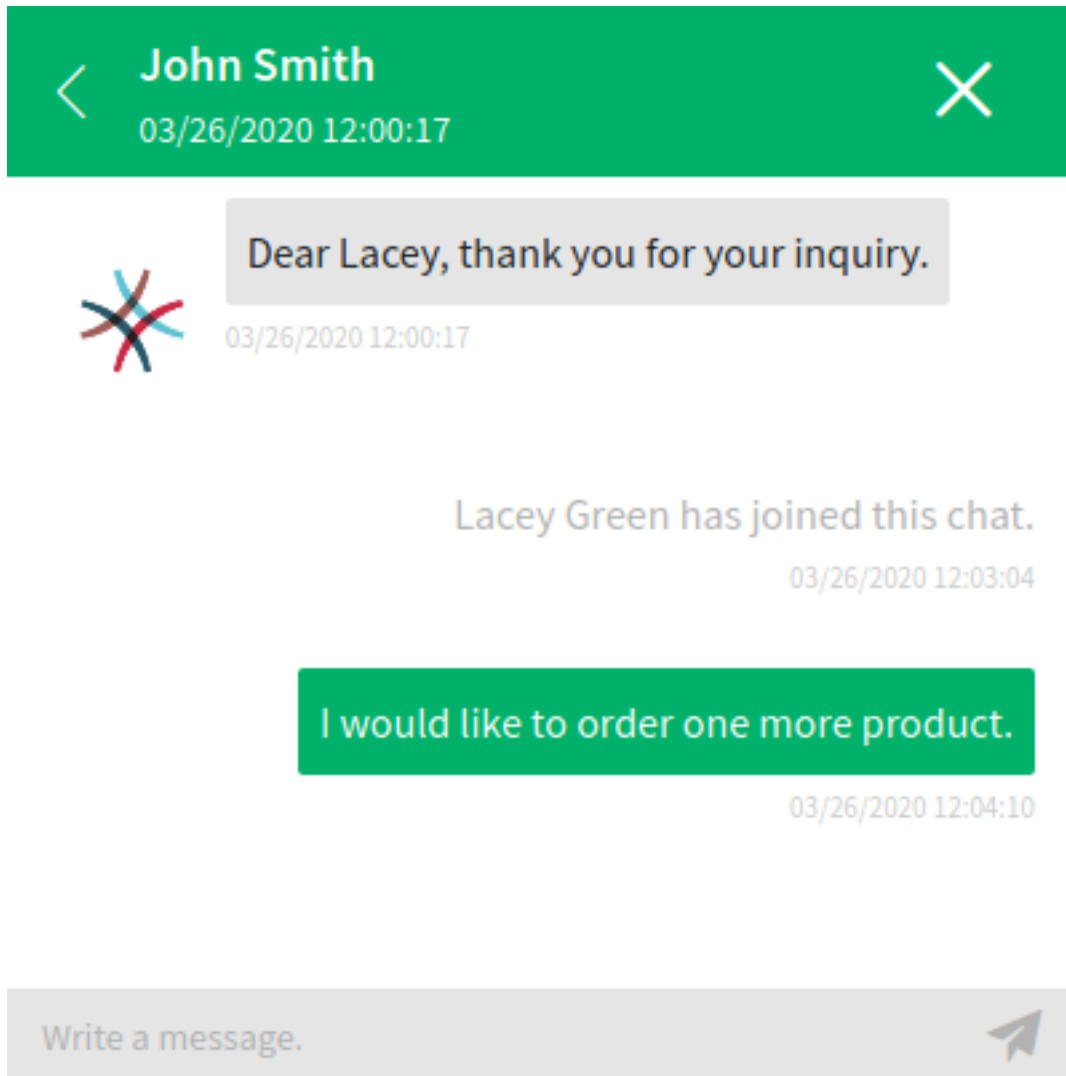


Fig. 10: Agent to Customer User Chat

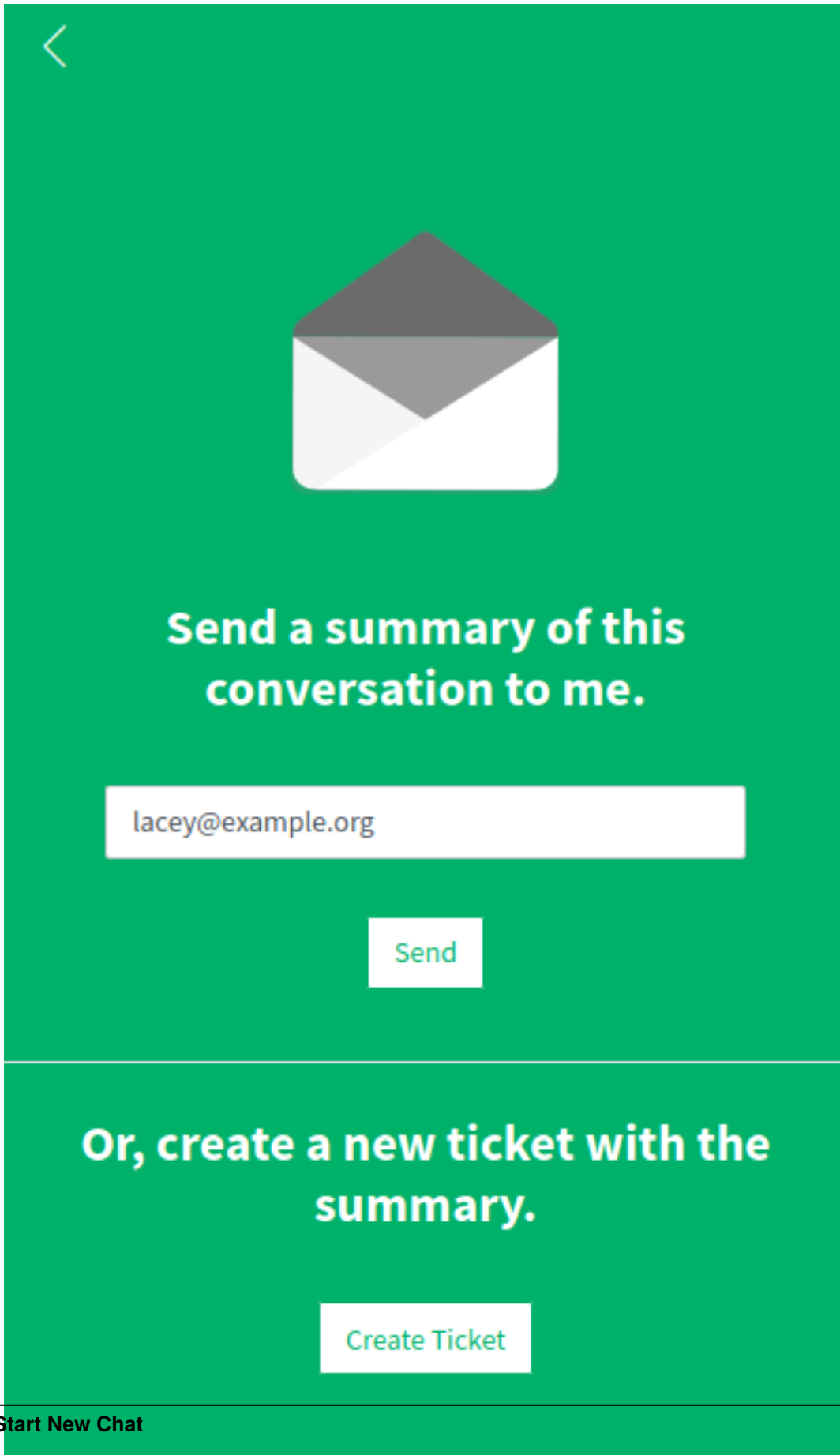


Fig. 11: Save the Conversation on External Interface

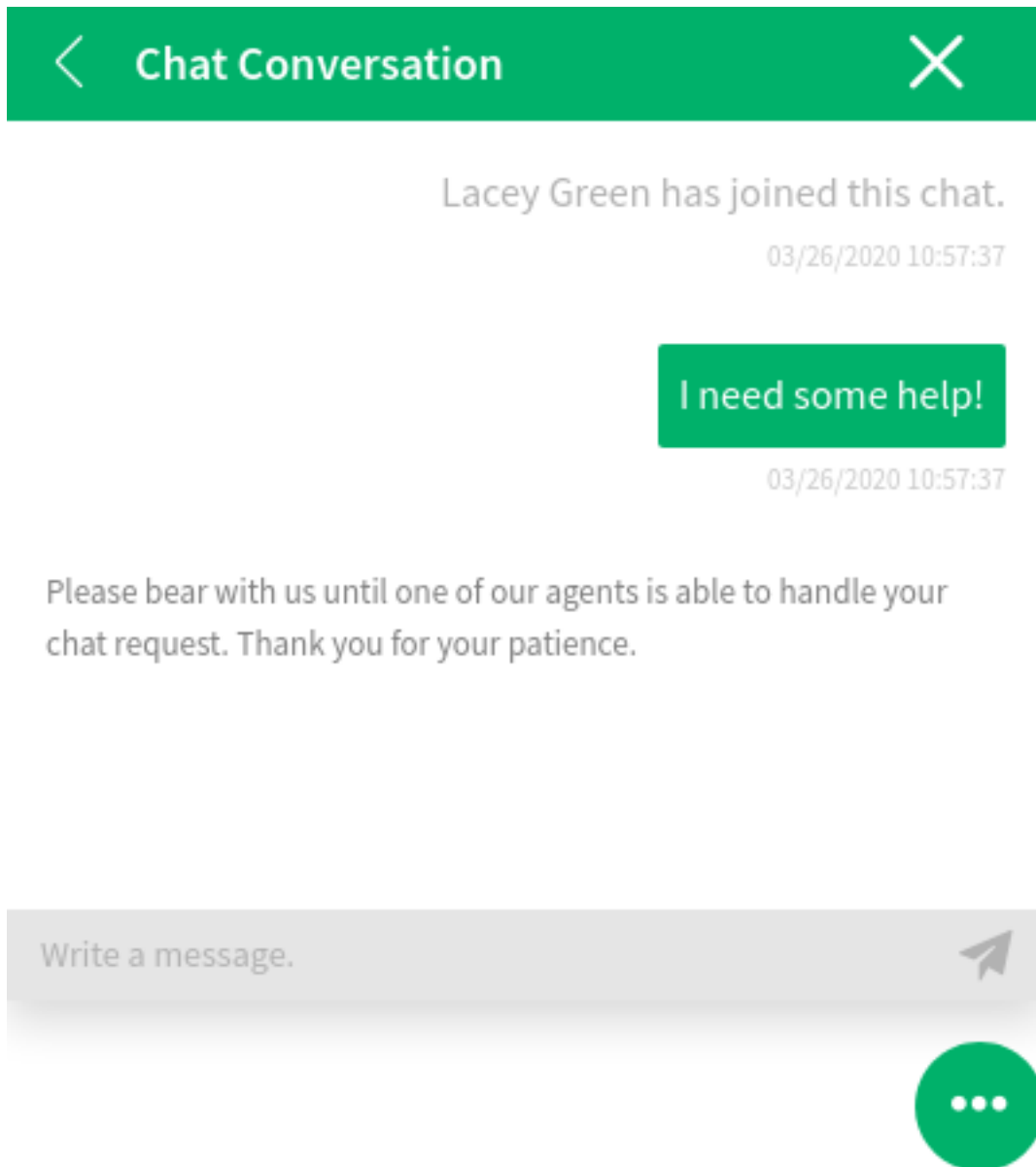


Fig. 12: Start Chat Window



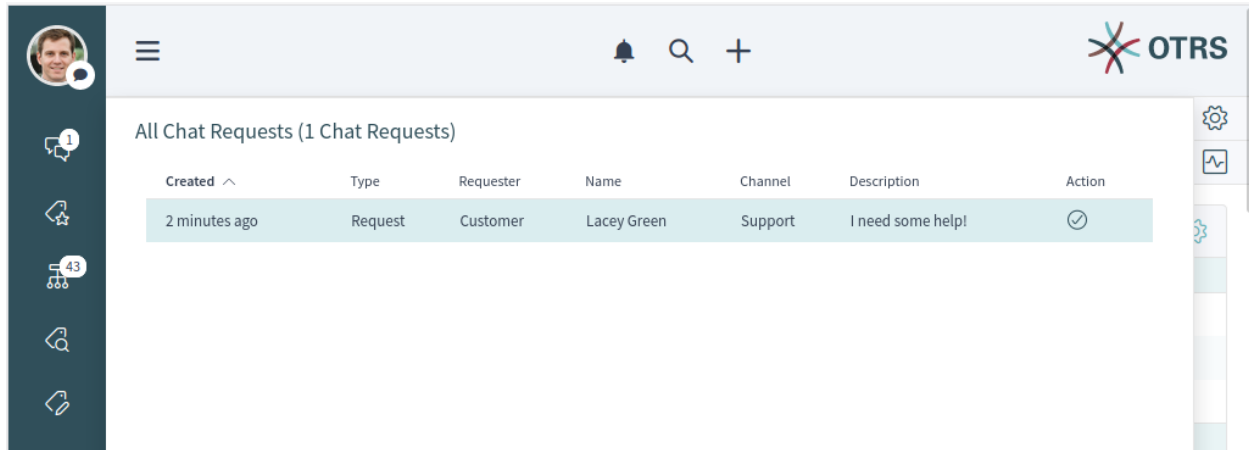


Fig. 13: General Chat Requests From Customers Widget

## 13.4 Chat Bubble

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

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

The chat widget has some icons in the header bar.

The menu has several menu items.

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

**Create phone ticket** Allows you to create a phone ticket to which the current chat will be appended to as an article. After the ticket has been successfully created, the chat will get closed automatically. The phone ticket is explained in the [Tickets](#) chapter.

**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.

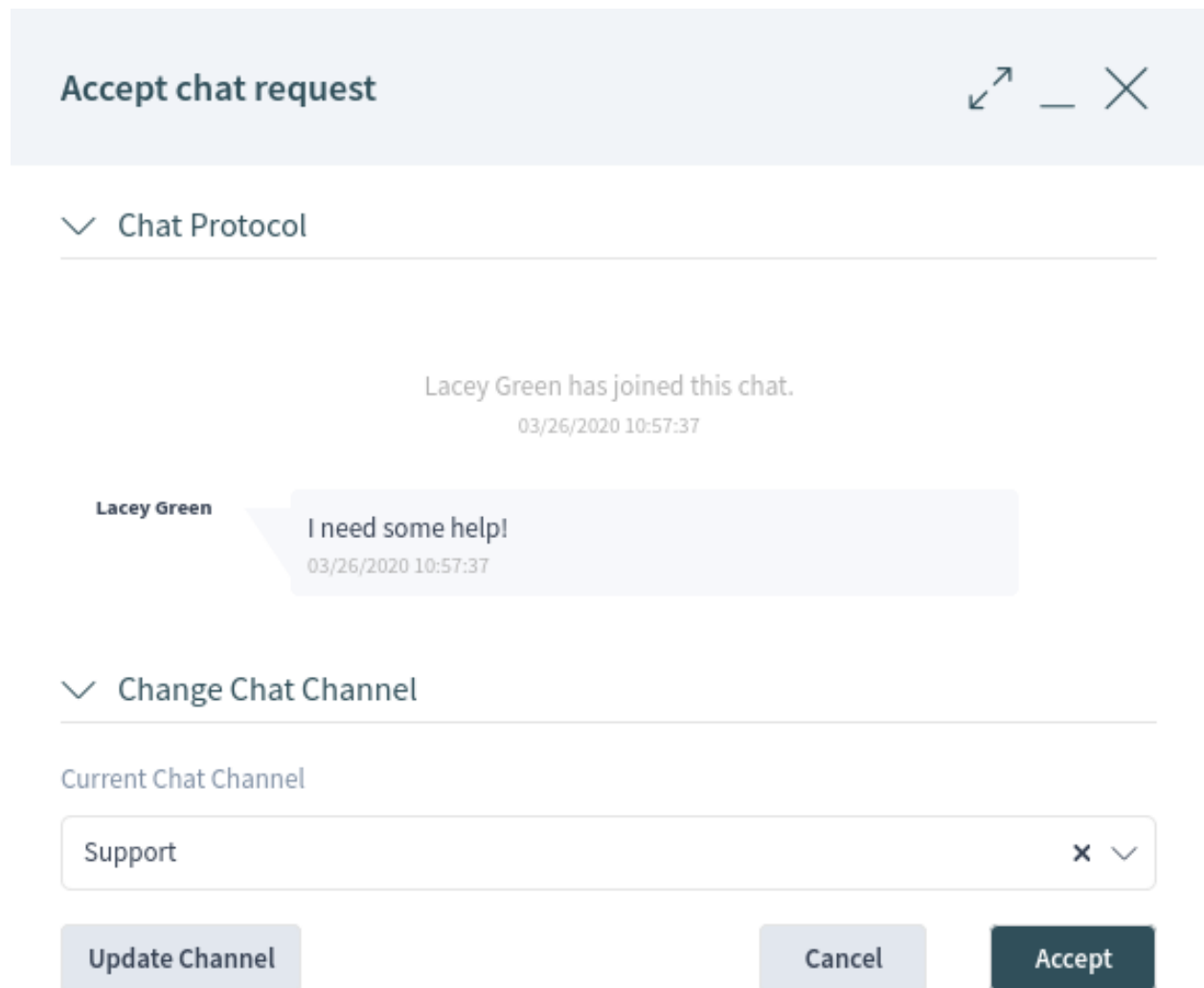


Fig. 14: Chat Preview Dialog

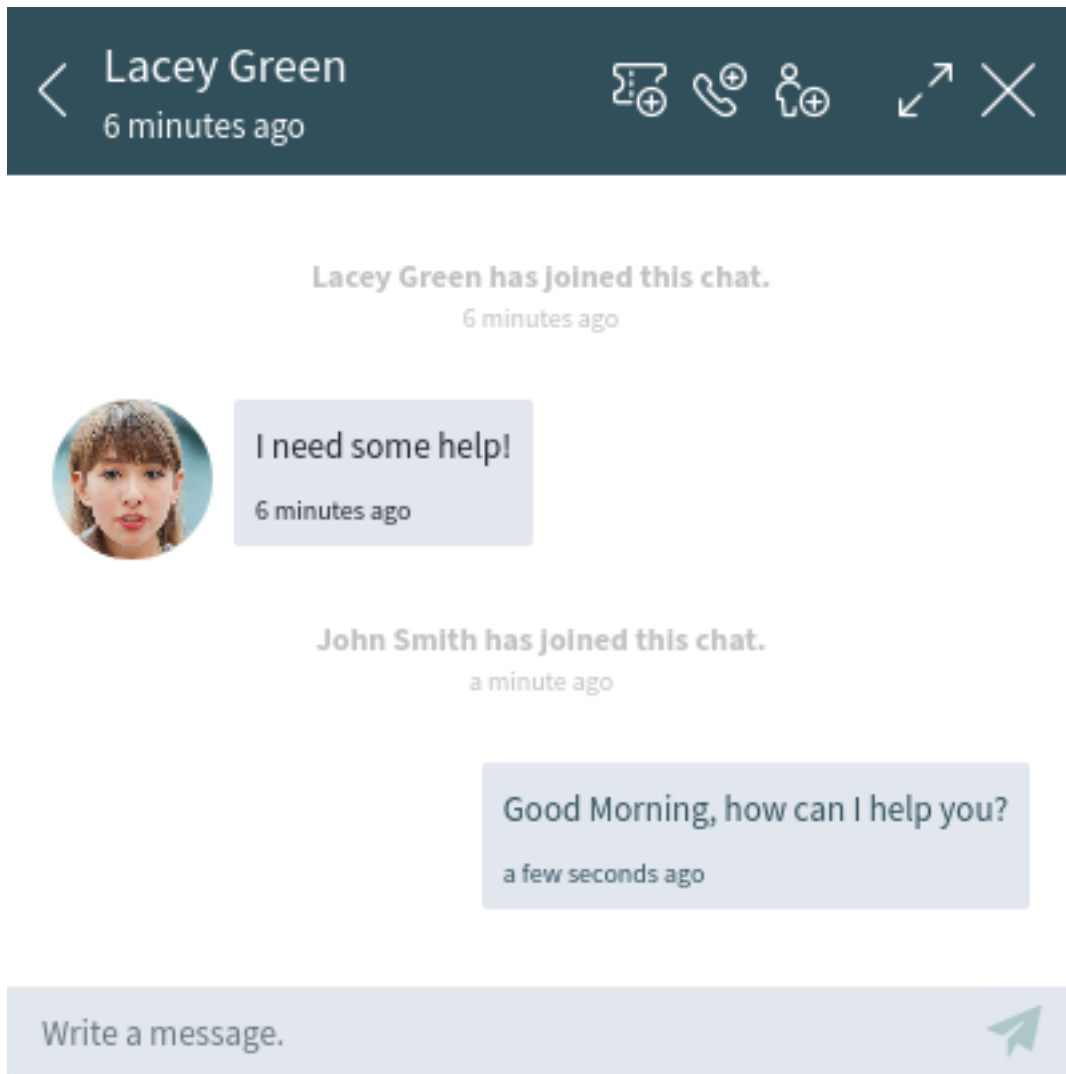


Fig. 15: Customer User to Agent Response

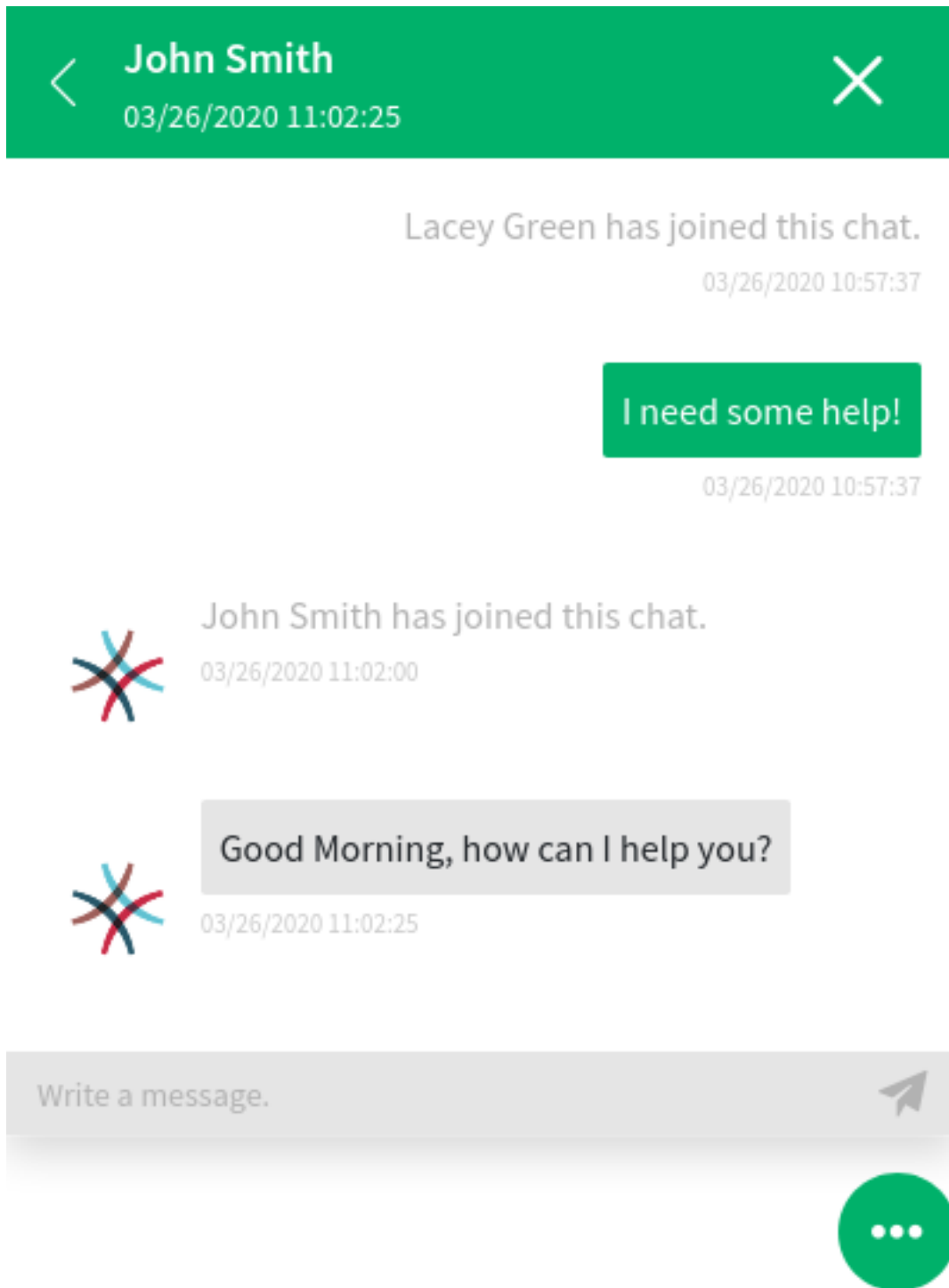


Fig. 16: Customer User Chat

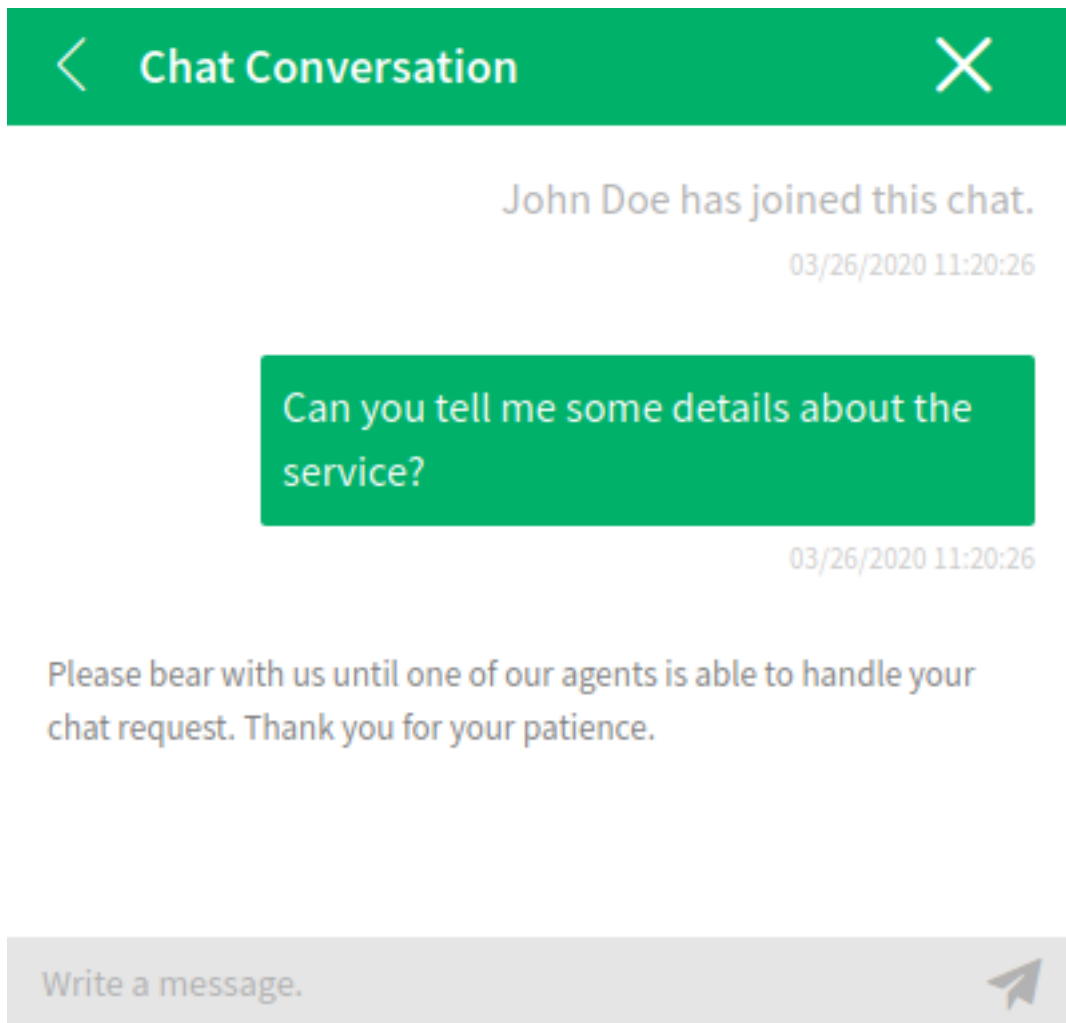


Fig. 17: Start Chat Window

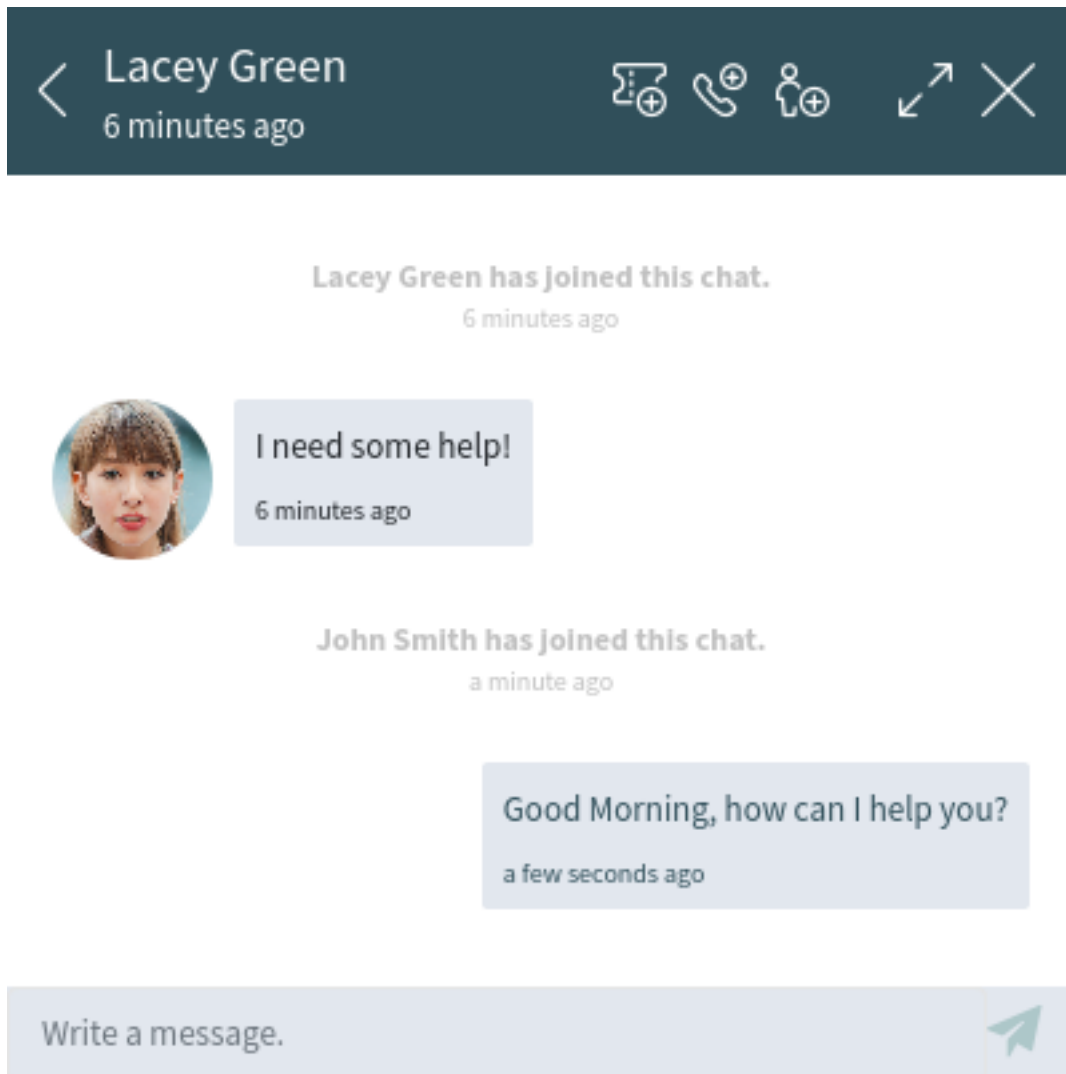


Fig. 18: Chat Widget

**Append to Ticket**

Results Append to Ticket x v

**Additional Filter**

Customer user (exact match) 

Owner 

Please select your filter 

Number	Title	Created	State	Queue
Currently no data available.				

**Chat Protocol**

Hi John Smith  
03/26/2020 12:10:56

Lacey Green has joined this chat.  
03/26/2020 12:43:10

Fig. 19: Append to Ticket





## Search

Use this menu item to search for something. The *Search Results* screen is available if you click on the magnification glass icon in the header bar, enter a search term and hit *Enter* key on your keyboard.

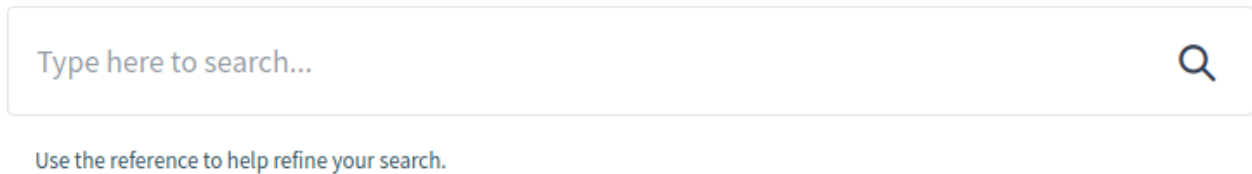


Fig. 1: Search Dialog

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

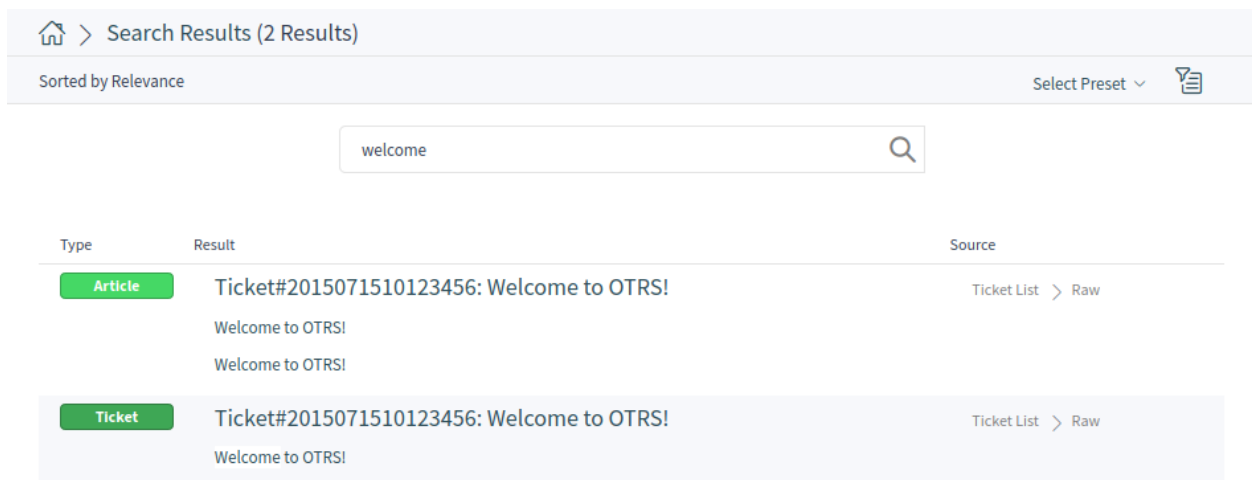


Fig. 2: Search Results Screen

This screen lists all objects that match the search term. The objects are grouped by type. To find the desired object, open the filter section from the breadcrumb bar and use the filters to narrow the results.

## 14.1 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~ fokc~`).

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.



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.

## 15.1 Manage Accounts

After starting the app, the account management screen is displayed. This lists each of the accounts that you use to login to **OTRS**. It is possible that you use multiple OTRS instances for your job and that each has its own account, so the app allows you to add more than one account. As you add an account, the related OTRS instance will also be added and listed on the account management screen from that point on.

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 will become visible on the account management screen.

---

**Note:** It is possible to link multiple accounts. If multiple accounts are connected, the intro screen displays all connected accounts and the relevant OTRS account can be selected there.

---

To edit an account:

1. Tap the *Edit* icon in the title bar.

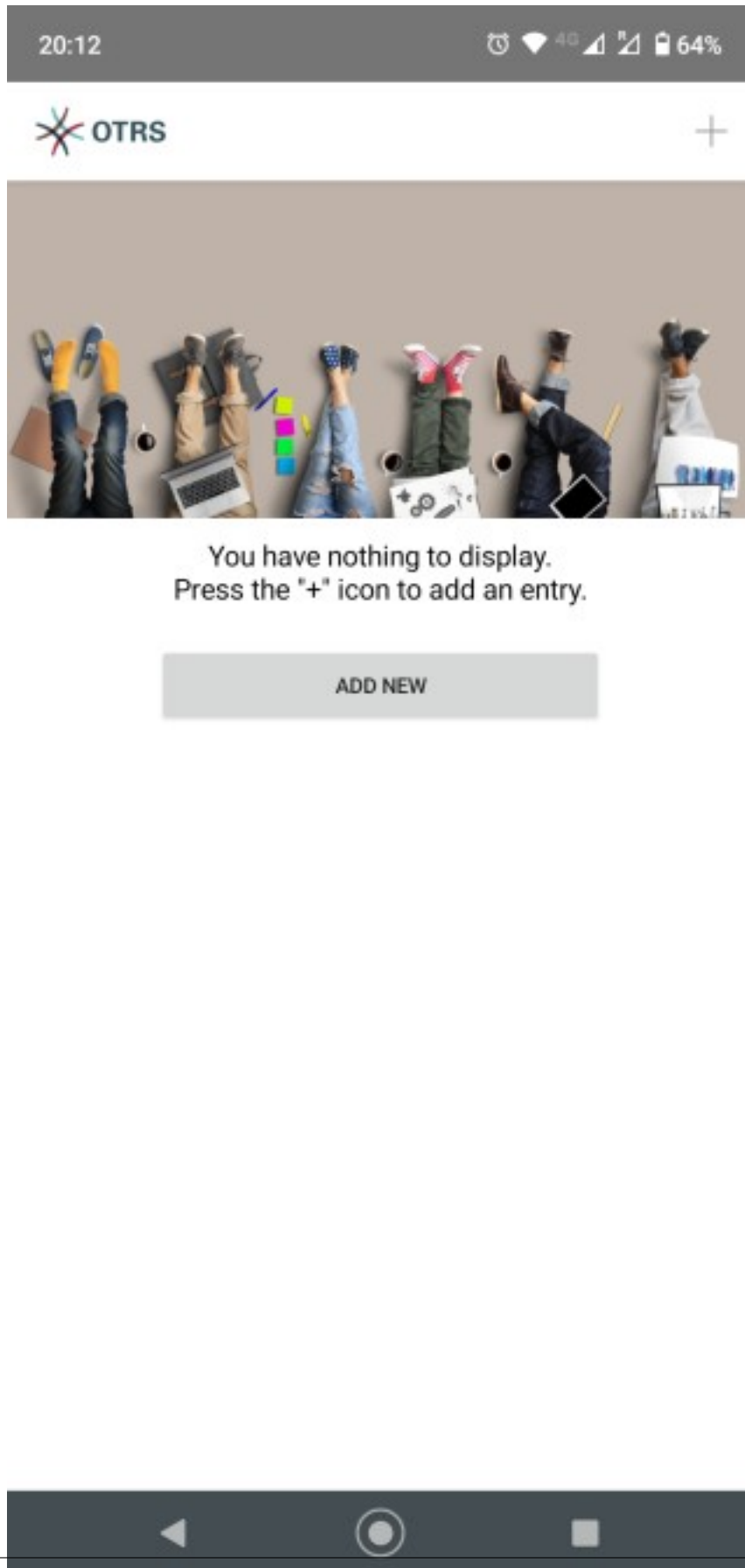


Fig. 1: Account Management Screen

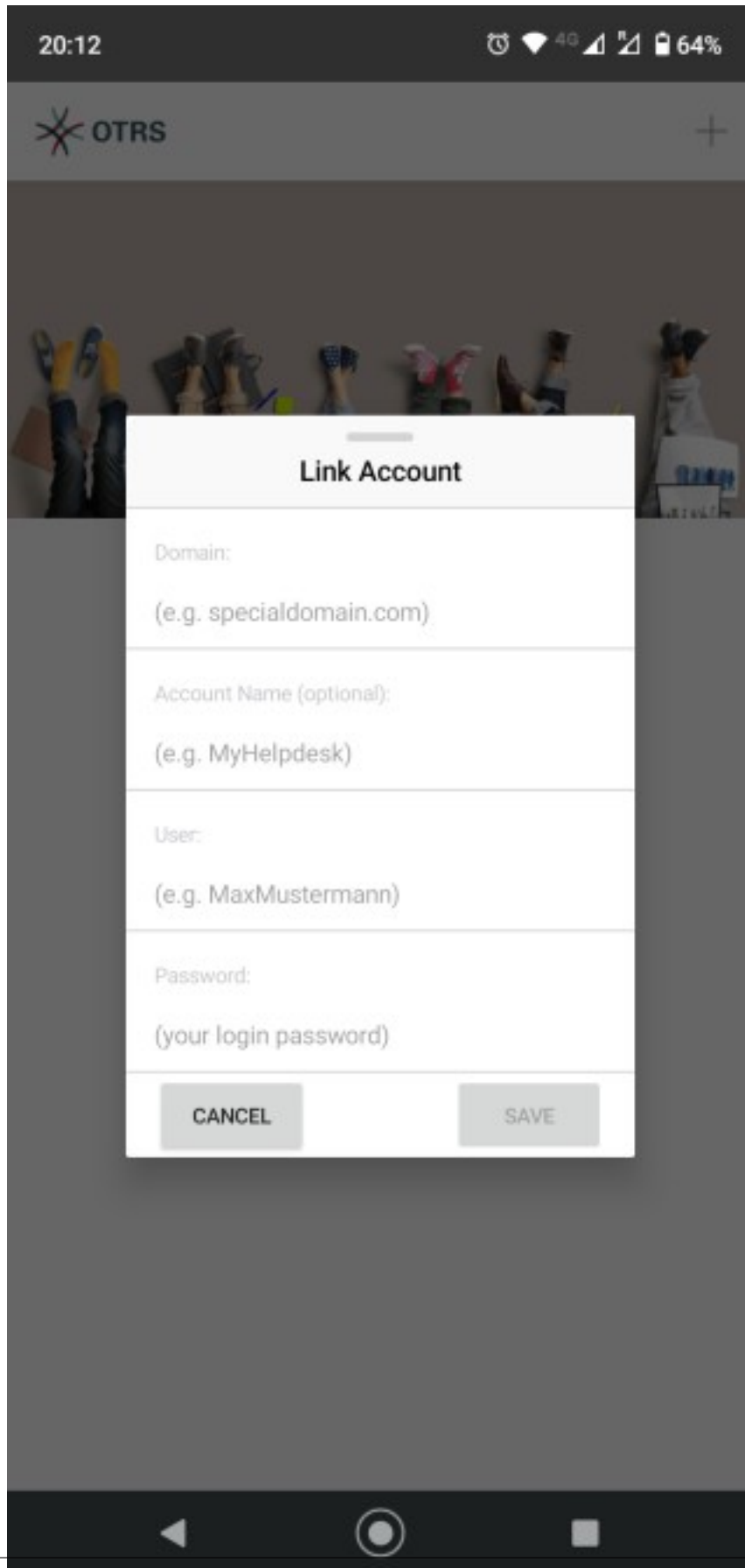


Fig. 2: Link Account Screen

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.

## 15.2 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.

---

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**.

In mobile mode, the organizer sidebar is collapsed and can be expanded by using the toggle icon in the main menu bar.



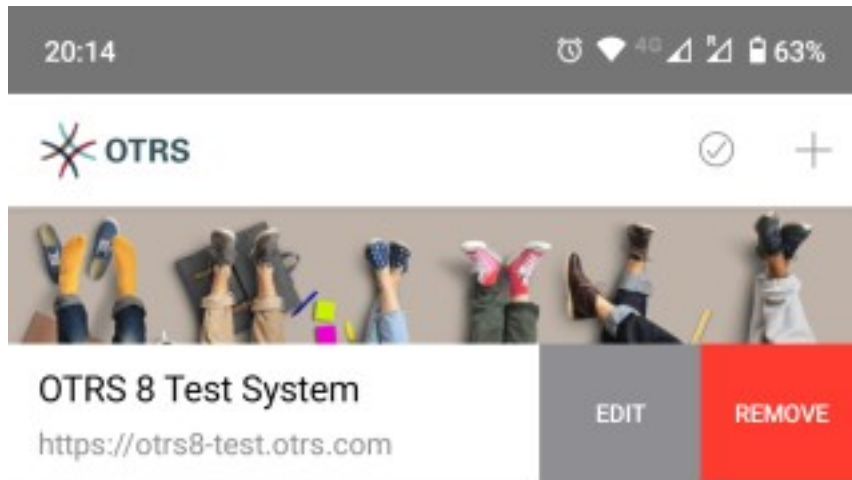


Fig. 3: Edit or Remove Account

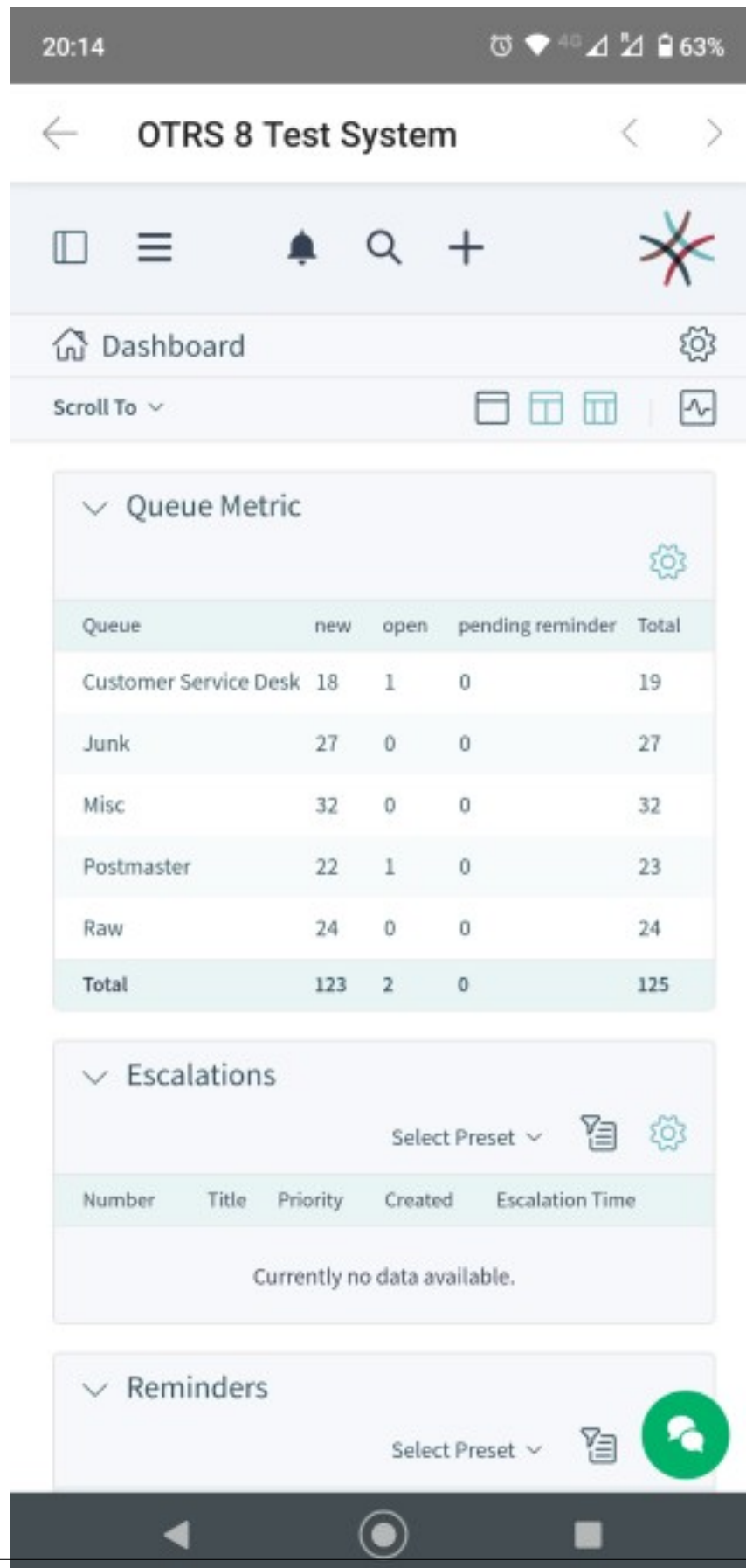


Fig. 4: Dashboard on a Mobile Device

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## 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.

### 16.1 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.


### 16.2 Create Account

1. Click on the *Login* button at the upper right corner.
2. Click the link *Register now*.
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.

OTRS

User name\*


Password\* 

Login

You do not have an account yet? Register now.

Have you forgotten your password?

Fig. 1: Login



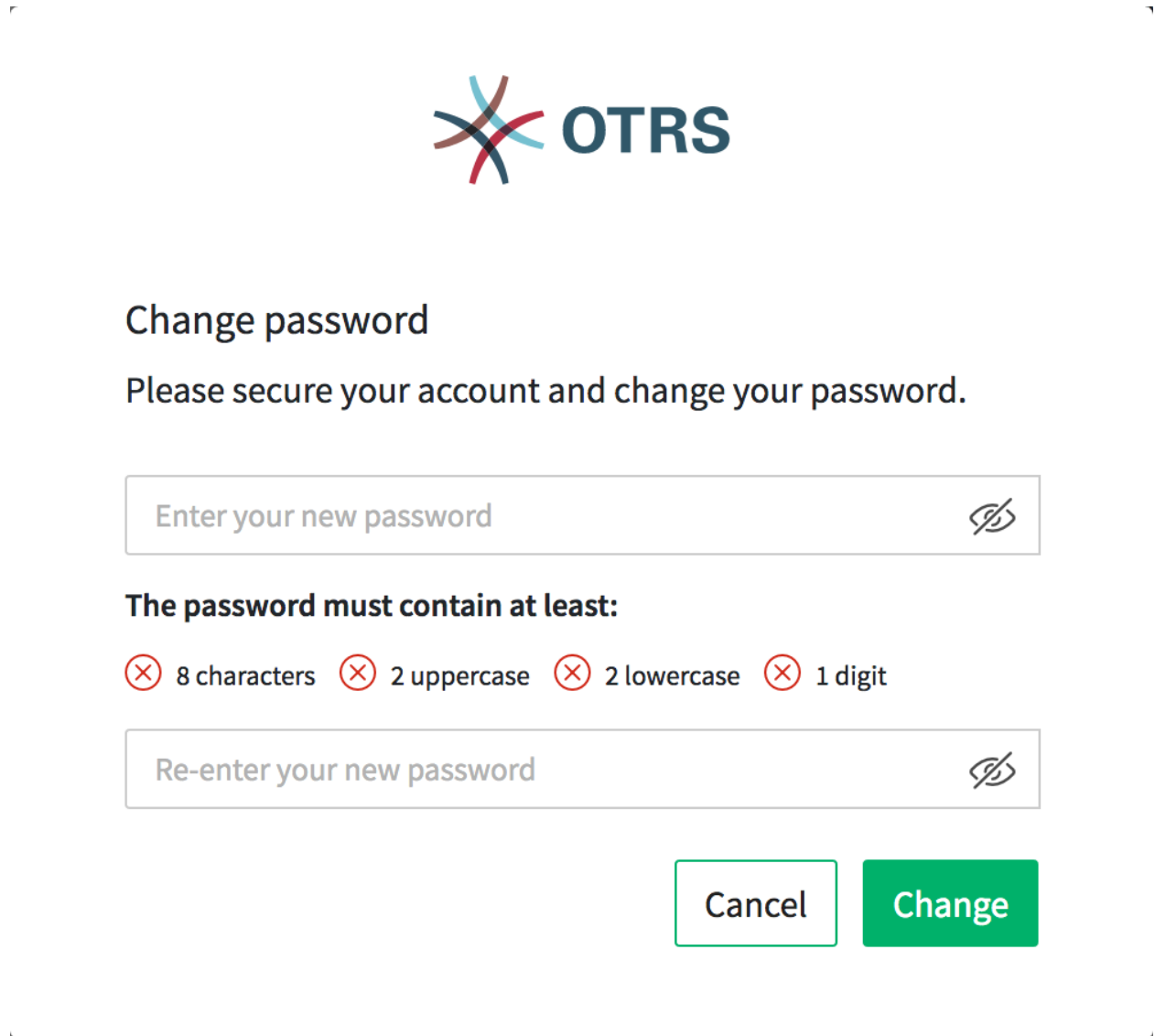
## Create Account


This will become your username.

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

Fig. 2: Create Account


## 16.3 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 

Fig. 3: Change Password

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

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


## 16.4 Two-factor Authentication

1. Choose your preferred authentication method.
2. Click on the *Next* button.




## 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

---

**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.



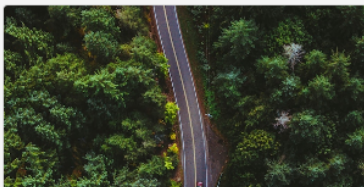


Custom Link 1 My Tickets <sup>0</sup> New Ticket  Lacey Green 

Knowledge Base Service Catalog Custom Link 2 Custom Link 3

### How can we help you today?

Search something...



#### Create Custom Content Pages

Use custom pages to provide your users with individualized content.



#### Provide Services

Offer your customers certain services with guided ticket creation.



#### Apply Your Corporate Identity

Upload your logo and change the OTRS Colors to match your corporate branding.



Fig. 1: 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 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.

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## Main Navigation and Footer

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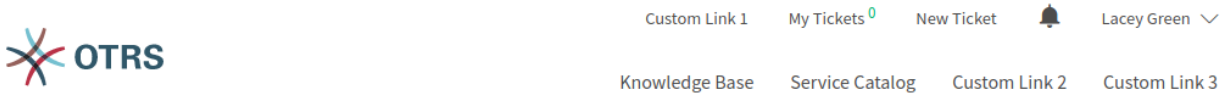


Fig. 1: Main Navigation

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*.

**User Name** A menu displays entries for *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*.



---

## Personal Preferences

---

The personal preferences view contains the sections *General* and *Security*.

---

**Note:** The content of your *Personal Preferences* may vary depending on the settings made by the system administrator.

---

### 19.1 General

In the section *General*, the customer user can change his avatar image, the language of the external interface and the preferred time zone.

### 19.2 Security

In the section *Security*, the customer user can change his password and the two-factor authentication settings.

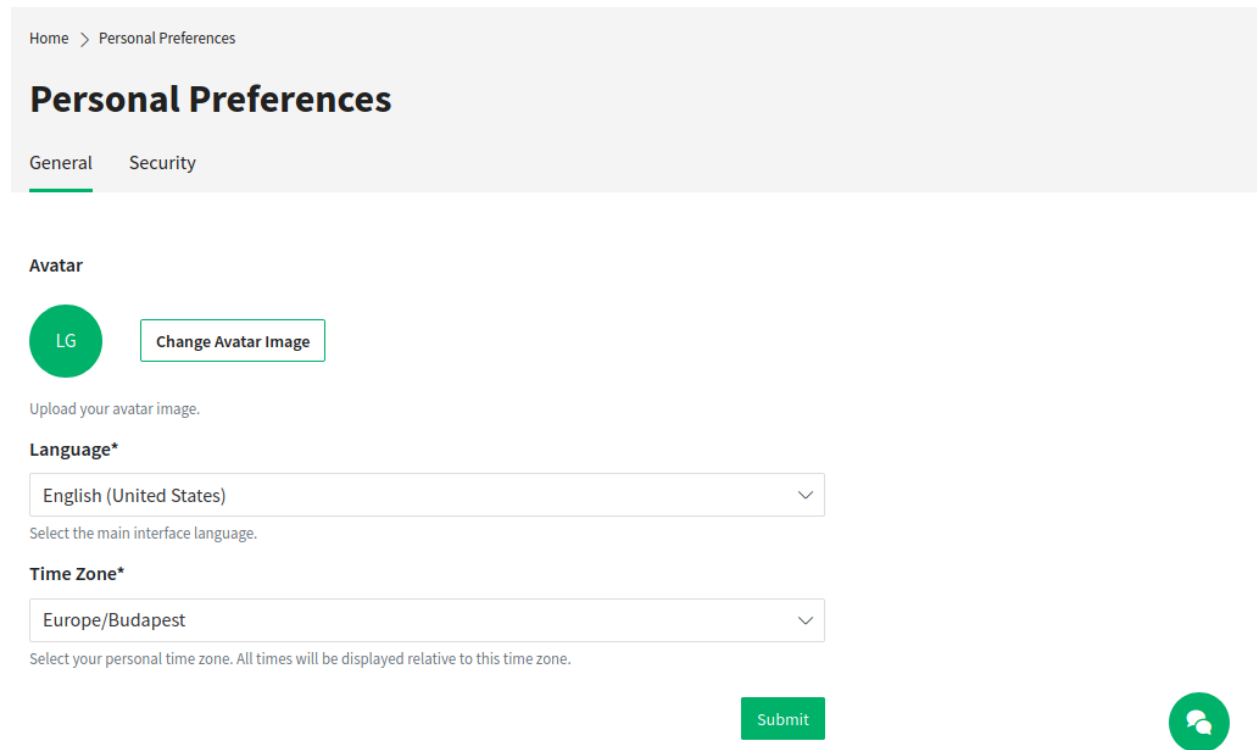



Fig. 1: Personal Preferences - General


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	<a href="#">Setup</a>
 Email	<a href="#">Setup</a>

Revoke all trusted devices 

[Submit](#)




Fig. 2: Personal Preferences - Security





---

## 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\***

**Attachments**

 Drop files here or click to select files 

**Create Ticket**

Fig. 1: 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

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.

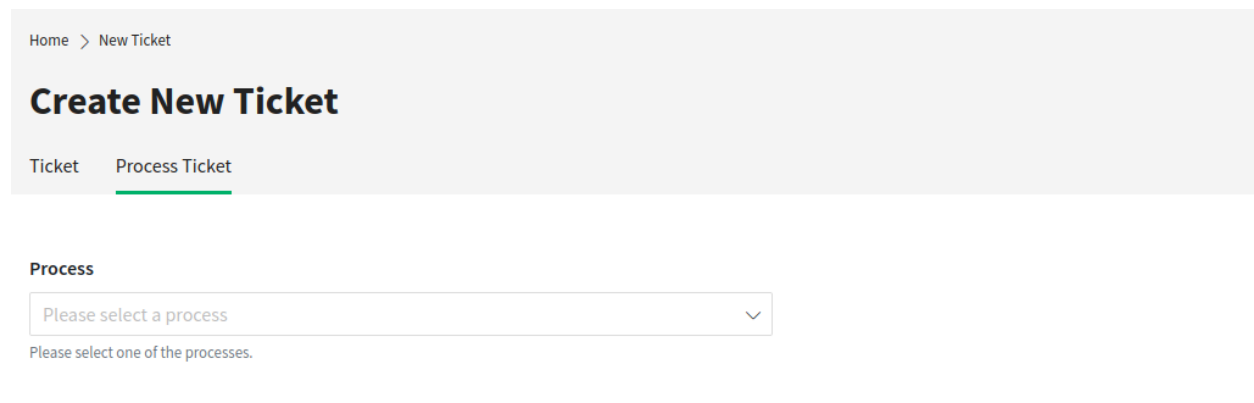


Fig. 2: Create Process Ticket

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.

---

## 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.

---

## 21.1 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.

**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 search bar, and several menu items: Custom Link 1, My Tickets (with a notification badge showing 5), New Ticket, and a user profile for Lacey Green. Below the navigation bar, there is a breadcrumb trail: Home > Ticket List. The main heading is "Ticket List". Underneath, there are tabs for "My Tickets" (which is selected) and "Company Tickets". Below the tabs, there are three filter buttons: "All Tickets" (selected), "Open Tickets", and "Closed Tickets". To the right of these filters is a search box with the placeholder text "Search for a ticket number or title". The main content is a table with the following columns: Ticket Number, Title, State, and Created. The table contains five rows of ticket data. The first row has a blue dot icon, ticket number 2020042210000038, title "Product catalog", state "new", and created date "04/22/2020 14:11:00". The second row has a blue dot icon, ticket number 2020042210000029, title "Product catalog", state "new", and created date "04/22/2020 10:12:08". The third row has a blue dot icon, ticket number 2020032510000409, title "Re: subject alalal 1234", state "new", and created date "03/25/2020 12:41:47". The fourth row has a blue dot icon, ticket number 2020032510000374, title "Good morning!", state "pending reminder", and created date "03/25/2020 12:41:45". The fifth row has a blue dot icon, ticket number 2015071510123456, title "Welcome to OTRS!", state "new", and created date "03/25/2020 09:38:08". A green circular icon with a white speech bubble is located at the bottom right of the table.

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	<b>Good morning!</b>	pending reminder	03/25/2020 12:41:45
2015071510123456	<b>Welcome to OTRS!</b>	new	03/25/2020 09:38:08

Fig. 1: My Tickets - All Tickets

OTRS

Custom Link 1 My Tickets<sup>4</sup> New Ticket Lacey Green

Knowledge Base Service Catalog Custom Link 2 Custom Link 3

Home > Ticket List

## Ticket List

My Tickets Company Tickets

All Tickets **Open Tickets** Closed Tickets

Search for a ticket number or title

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	<b>Good morning!</b>	pending reminder	03/25/2020 12:41:45
2015071510123456	<b>Welcome to OTRS!</b>	new	03/25/2020 09:38:08

Fig. 2: My Tickets - Open Tickets

OTRS

Custom Link 1 My Tickets<sup>4</sup> New Ticket Lacey Green

Knowledge Base Service Catalog Custom Link 2 Custom Link 3

Home > Ticket List

## Ticket List

My Tickets Company Tickets

All Tickets Open Tickets **Closed Tickets**

Search for a ticket number or title

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

Fig. 3: My Tickets - Closed Tickets

## 21.2 Company Tickets

The view in this section shows all tickets assigned to a certain customer. All customer users assigned to this certain customer can see the content in this list.

---

### 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. At the right side, the following ticket information displays 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 button *Respond to This Ticket* at the right side scrolls the user directly to the response section of the view.

## New keyboard needed

### **RM** New keyboard needed

Hi,  
I need a new keyboard.  
Greetings  
Robert

Created: 01/28/2020 19:31

[Respond to This Ticket](#)

**State**  
pending reminder

**Ticket Number**  
2020012854000031

**Queue**  
Postmaster

**Priority**  
3 normal

### Available at Februar

Hi,  
I have new keyboards available in Februar.  
Greetings  
John Smith

Created: 01/28/2020 19:33

#### Subject\*


**RM** Re: New keyboard needed

Subject for a new article.

#### Message\*


Please enter a message for the new article.

#### Attachments

 Select or drop files here.



Submit

English (United States) 

[Knowledge Base](#)

[Privacy Policy Example](#)

Copyright (C) 2001-2020

[Service Catalog](#)

[Imprint Example](#)

OTRS AG

Fig. 1: Ticket Detail View



## 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 users tickets
- State changes of a ticket

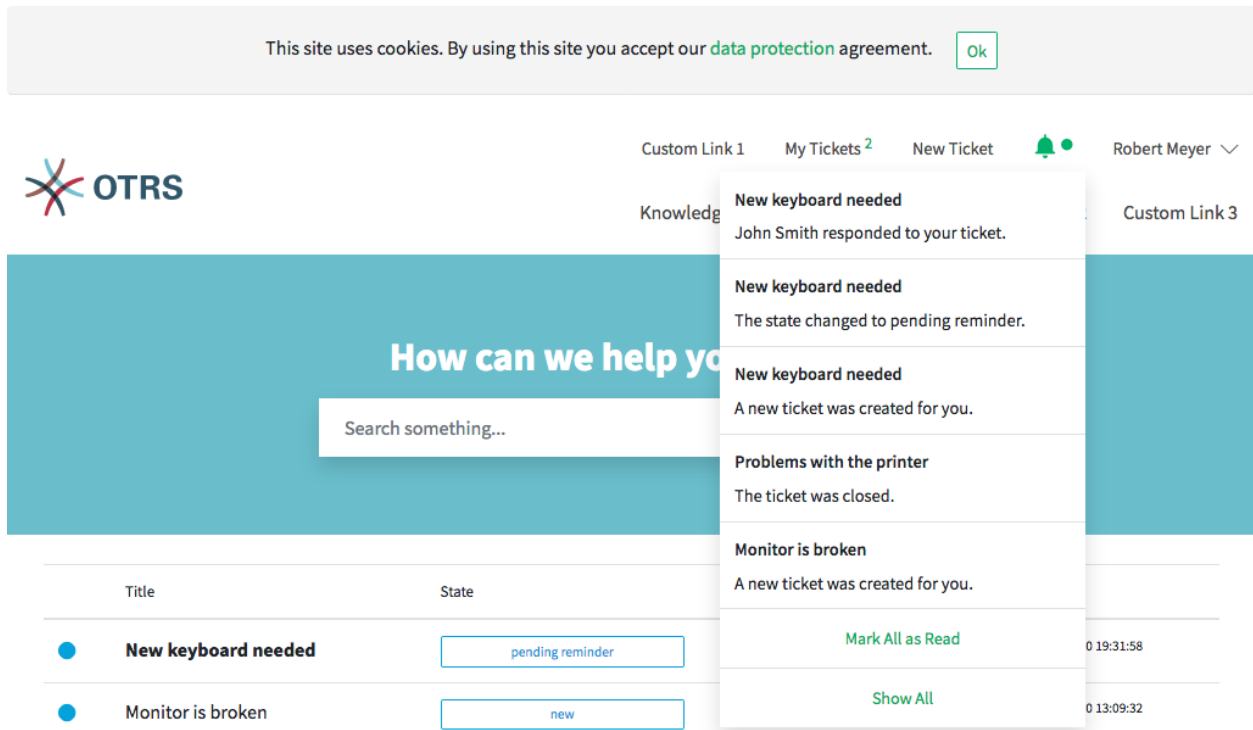


Fig. 1: Notification Screen on Hover

The bell icon in the meta navigation bar informs users 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.

Home > My Notifications

## My Notifications

<b>Product catalog</b>	John Smith responded to your ticket.	04/23/2020 13:30:37
<b>Product catalog</b>	The ticket was closed.	04/23/2020 13:30:37
<b>Product catalog</b>	A new ticket was created for you.	04/22/2020 14:11:01
<b>Product catalog</b>	A new ticket was created for you.	04/22/2020 10:12:09
<b>Good morning!</b>	The state changed to pending reminder.	04/21/2020 16:57:53

First Previous 1 2 Next Last

Mark All as Read

Fig. 2: My Notifications - All

If the customer user then clicks on an entry with the mouse, the corresponding ticket is displayed in the *Ticket Detail View*. If the customer user clicks the blue circle near the titles he can set the ticket notifications to read or unread.

---

### Service Catalog

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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 users clicks the hovered-over entry, he will be guided to the linked page.

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

---

**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.

---

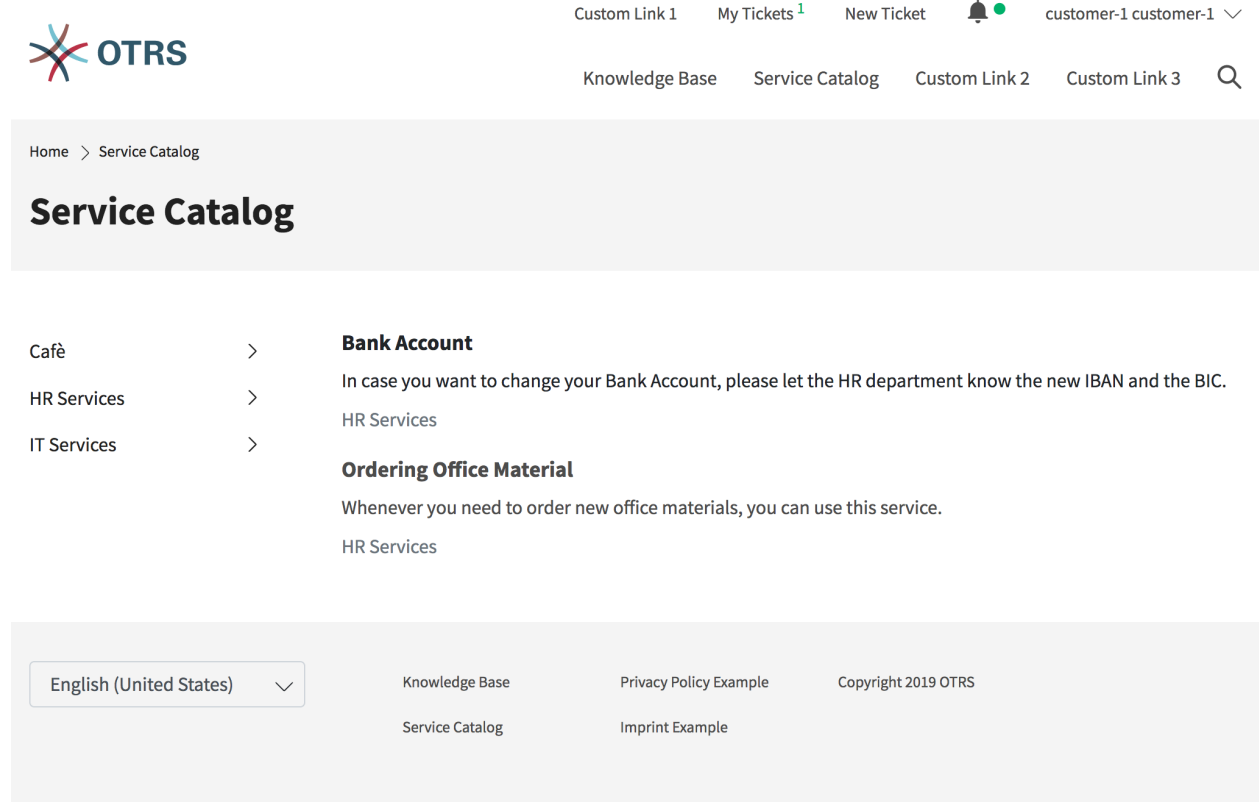


Fig. 1: Service Catalog

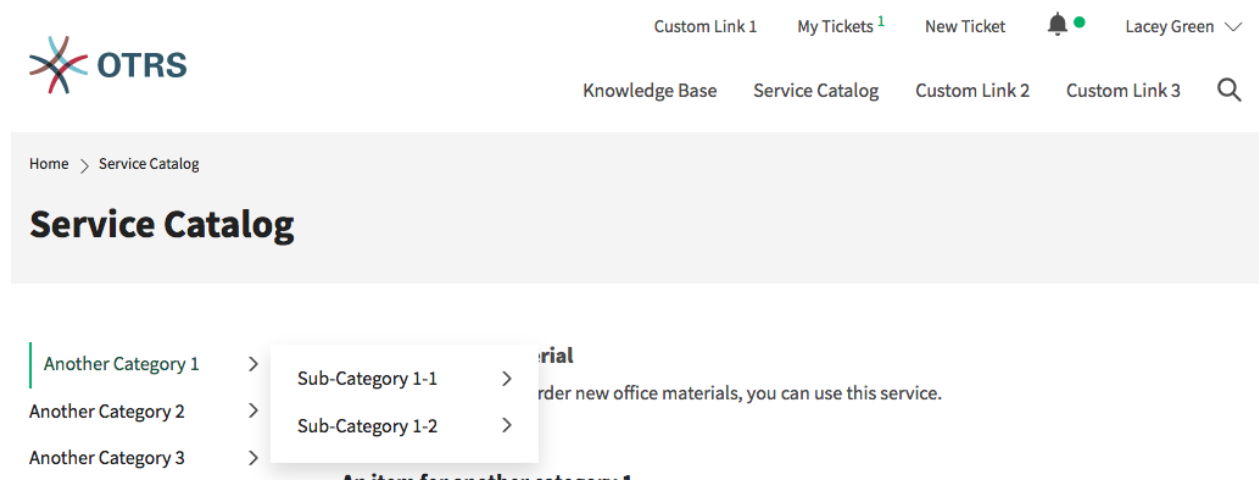


Fig. 2: Catalog with Subcategories

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### Knowledge Base

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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.

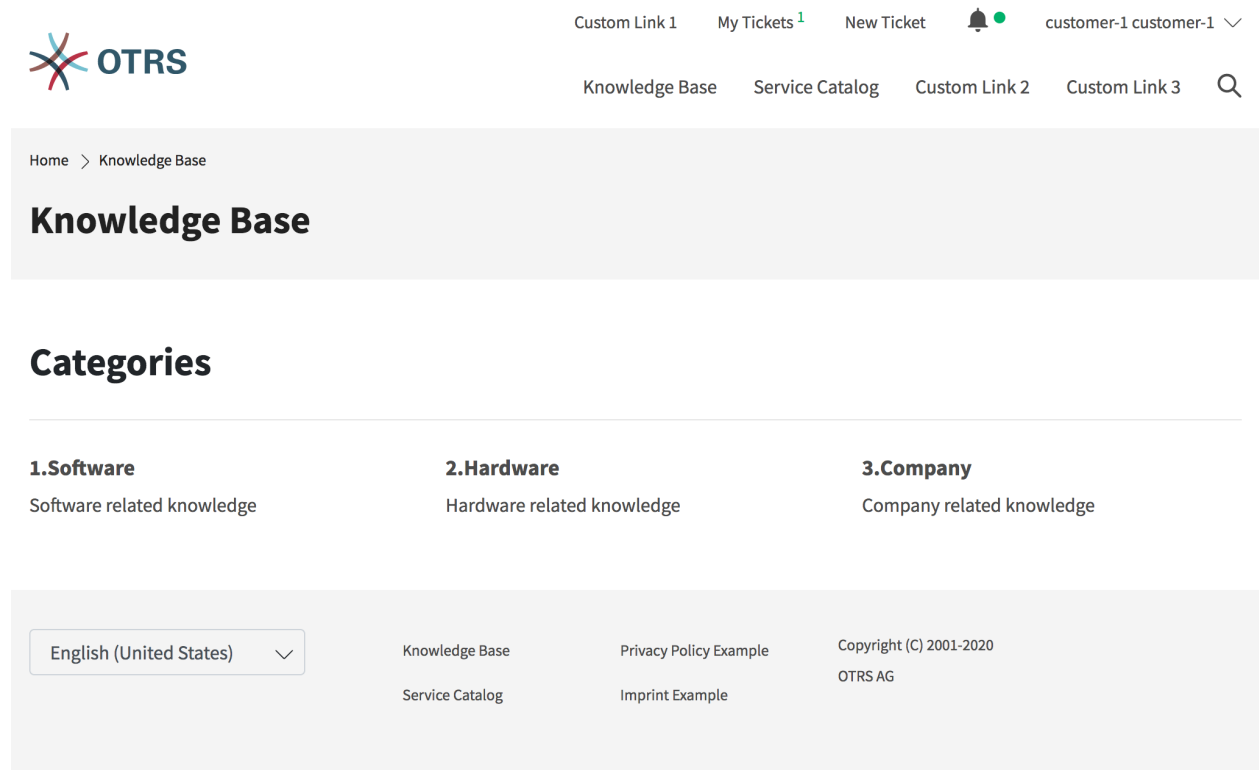


Fig. 1: Knowledge Base Categories

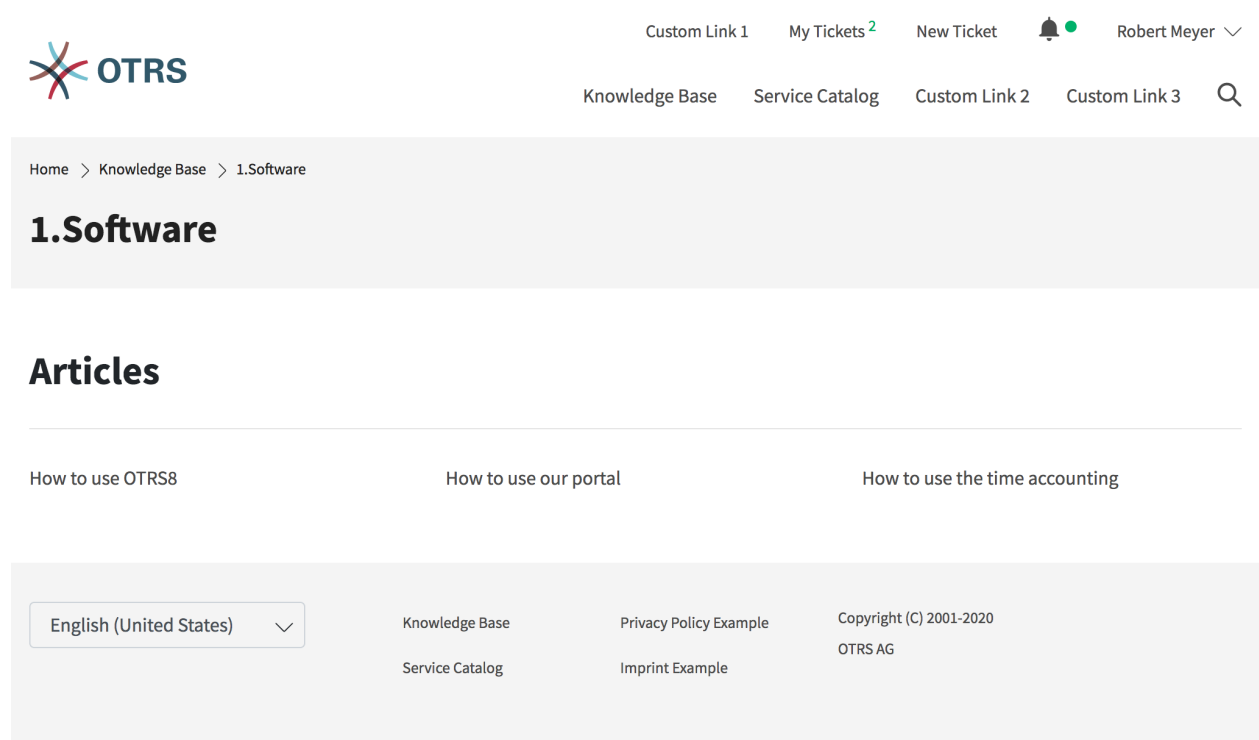


Fig. 2: Knowledge Base Article

## CHAPTER 26

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### Search

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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





## CHAPTER 27

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### Custom Pages

---

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



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.

### 28.1 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.

### 28.2 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 steps are the same as described in *Customer User to Agent* section.

#### 28.2.1 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.

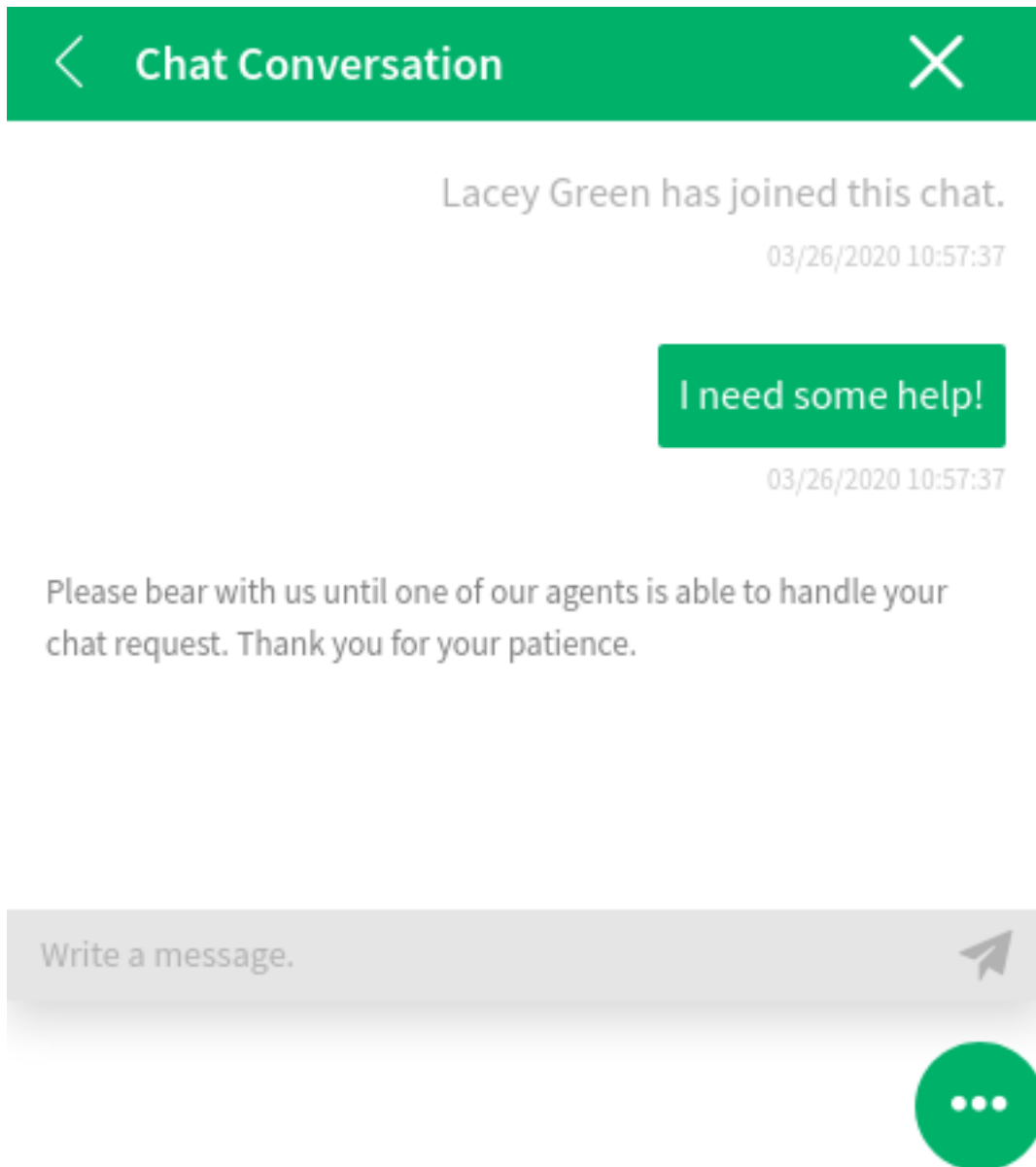


Fig. 1: Start Chat Window

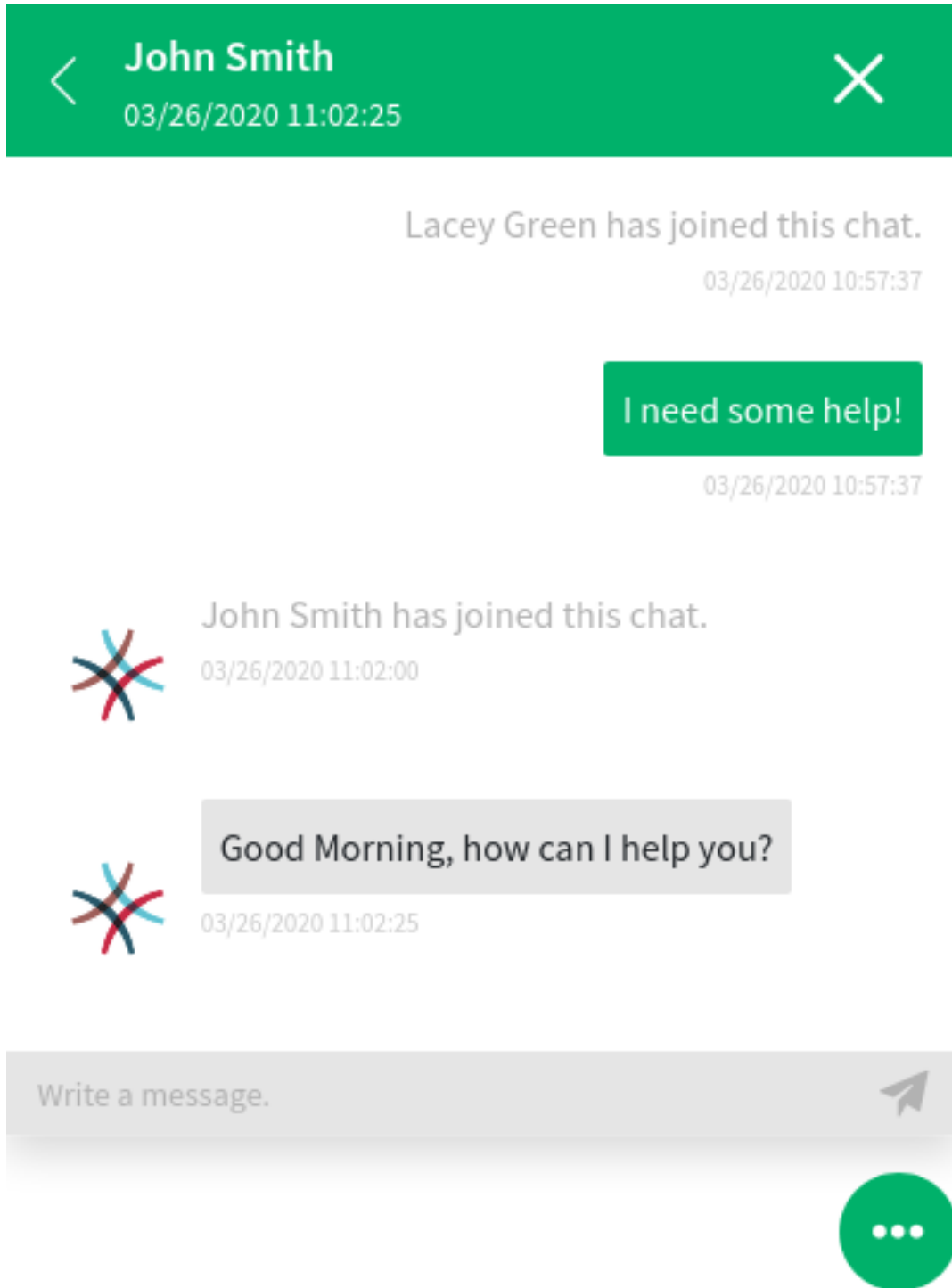


Fig. 2: Customer User Chat

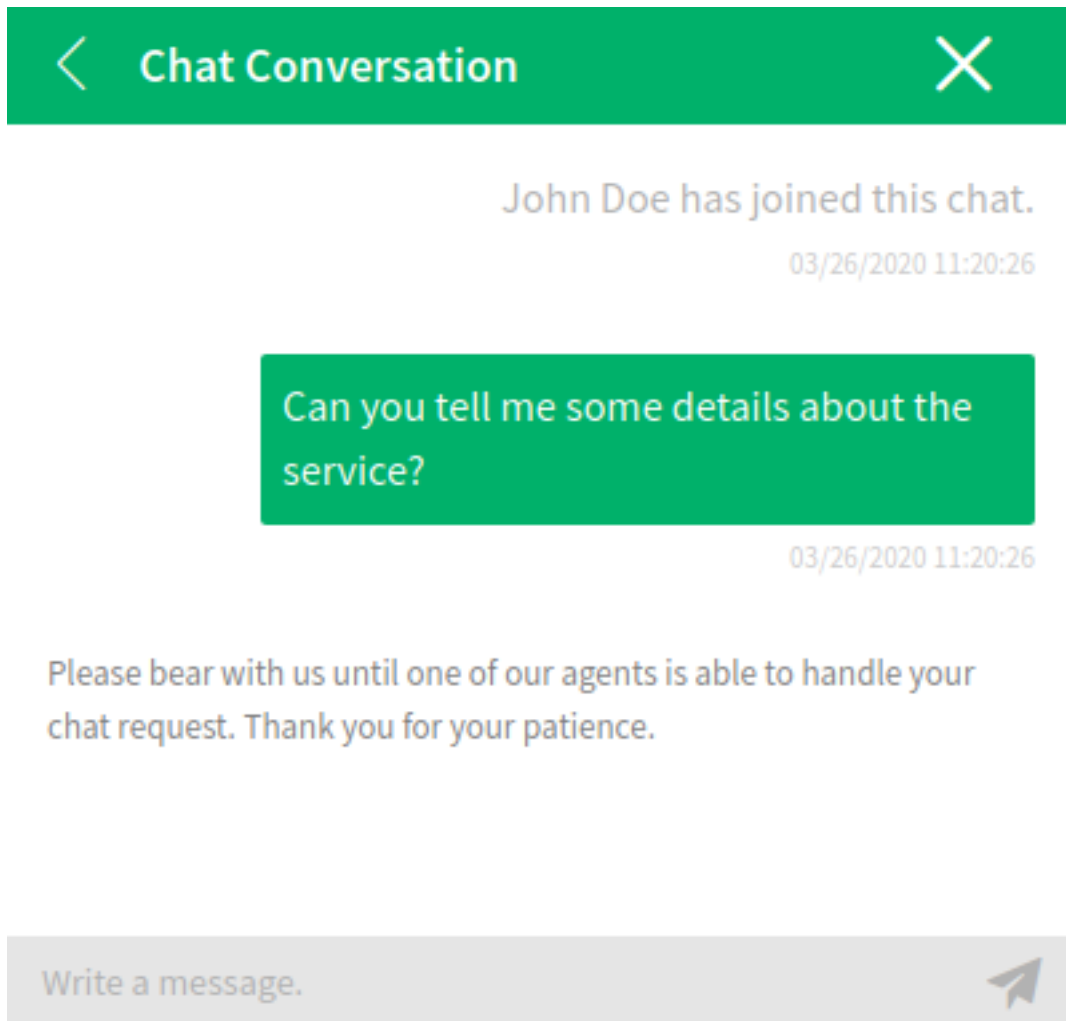


Fig. 3: Start Chat Window

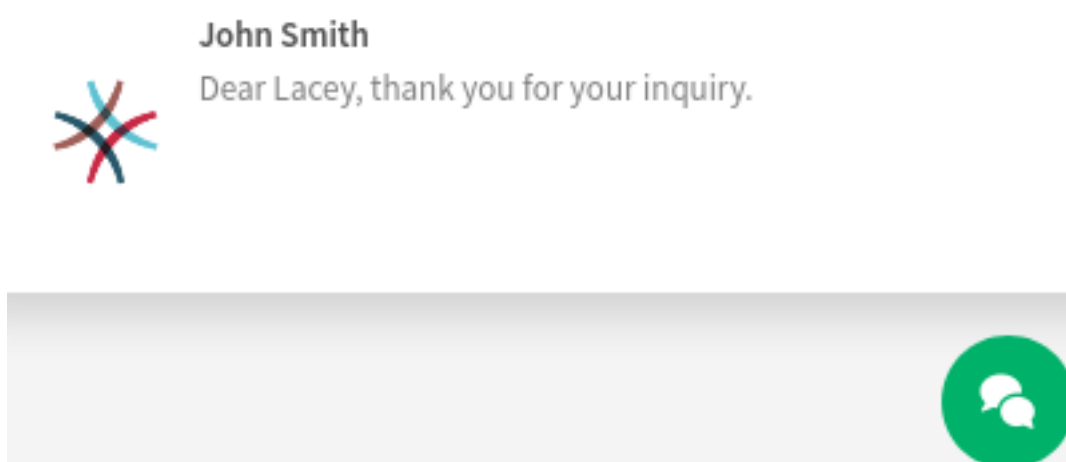


Fig. 4: Chat Request on External Interface

- When you accept the chat request, you can chat now.

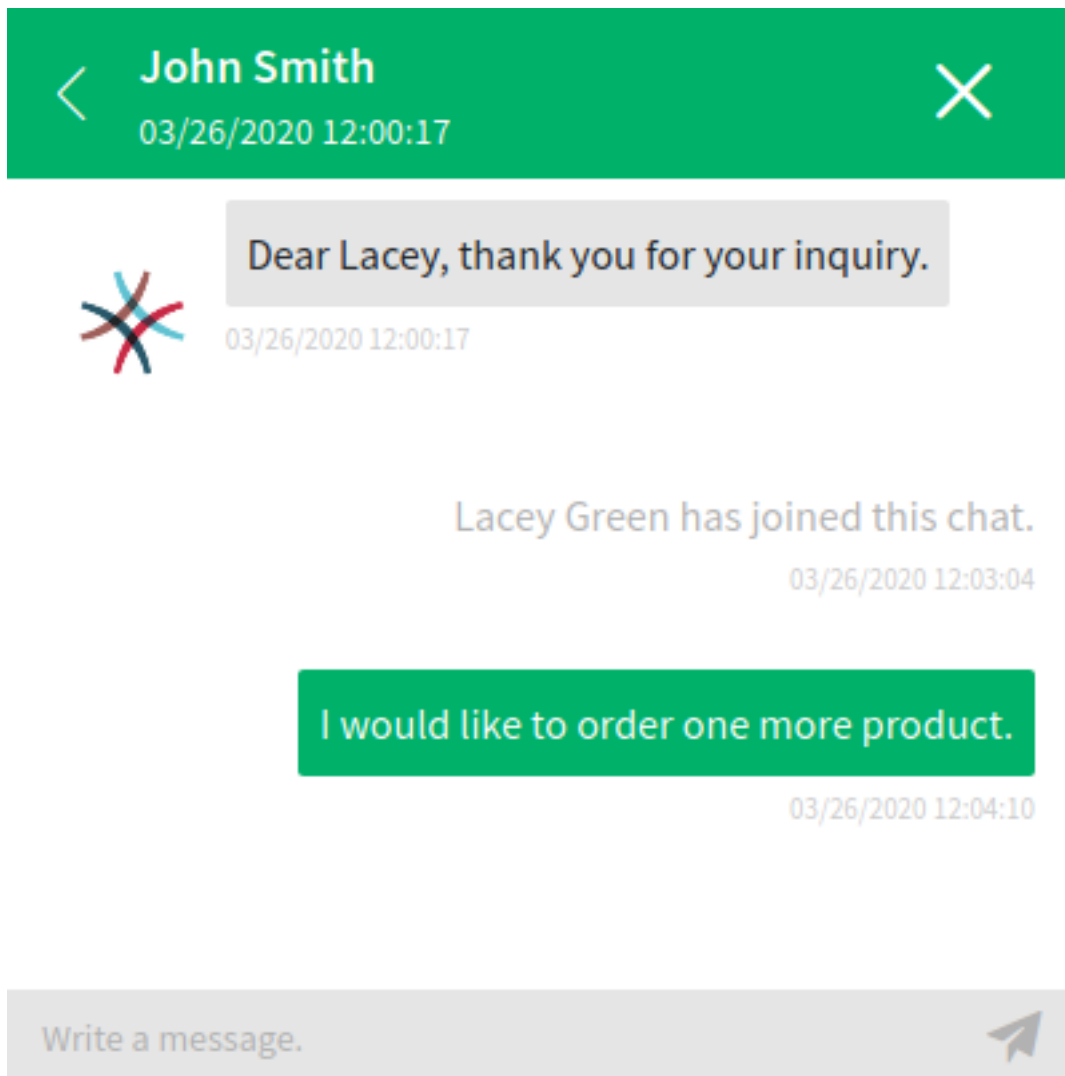


Fig. 5: Agent to Customer User Chat

- When you close the chat, it is possible to send the chat via email or to create a ticket from the conversation.

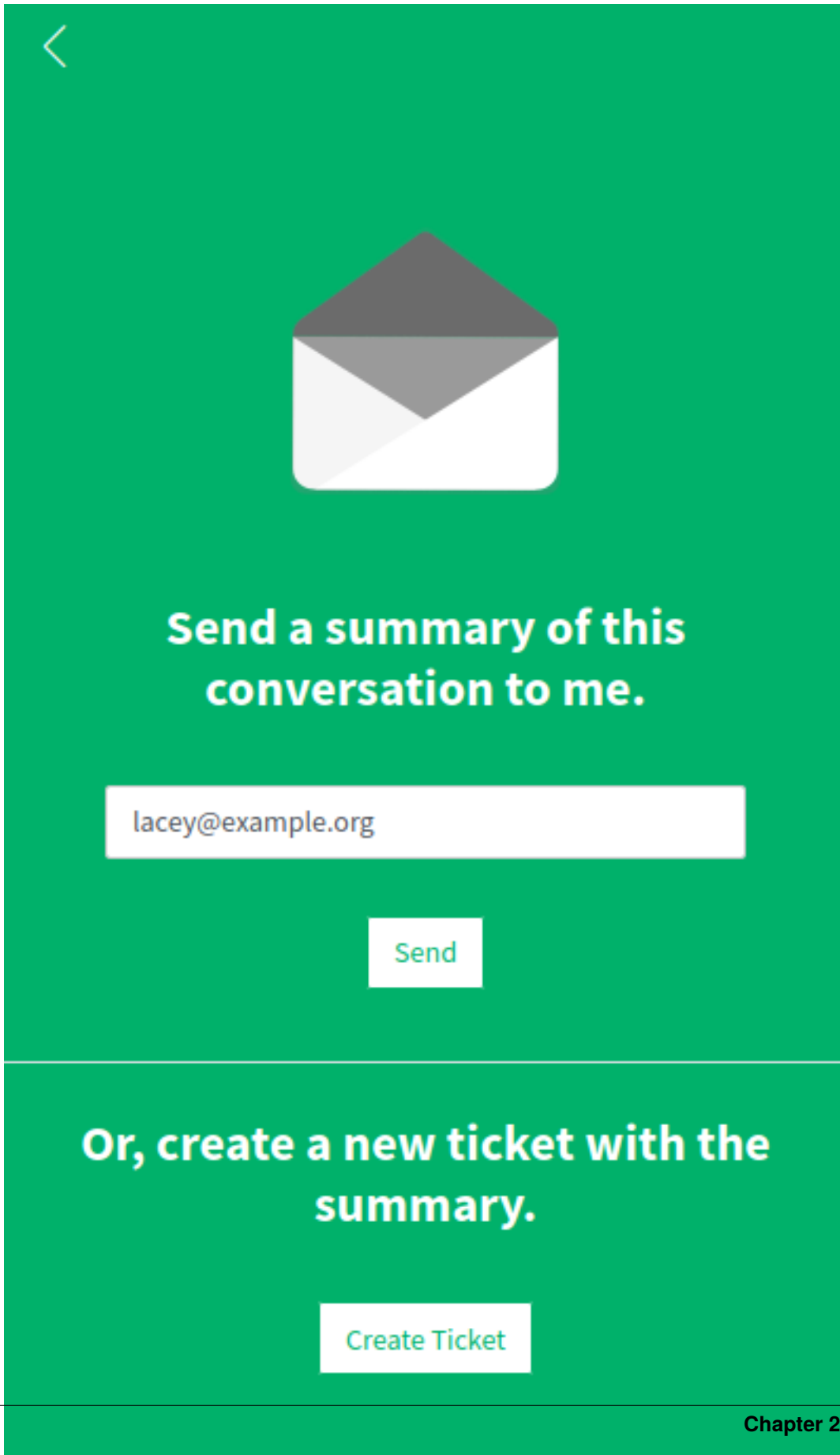


Fig. 6: Save the Conversation on External Interface