osTicket Documentation

Release 1.12.2

Enhancesoft

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osTicket is a widely-used open source support ticket system. It seamlessly integrates inquiries created via email, phone and web-based forms into a simple easy-to-use multi-user web interface. Manage, organize and archive all your support requests and responses in one place while providing your customers with accountability and responsiveness they deserve.

CHAPTER 1

Installation

osTicket comes with its own web-based installer to help guide you through the installation process without the frustration. While the installer provides step by step guide during the installation process, it's important and helpful to have general knowledge about Web servers, PHP and MySQL.

CentOS 7:

1.1 Prerequisites

To install osTicket, your web server must have PHP 5.6 (or better) and MySQL 5.0 (or better) installed. If you are unsure whether your server meets these requirements, please check with your host or webmaster before proceeding with the installation.

You will need one MySQL database with valid user, password and hostname handy during installation. MySQL user must have FULL privileges on the database. If you are unsure whether you have these details or if the user has sufficient permissions, please consult your host or database admin before proceeding.

WINDOWS RECOMMENDED LINKS

1. PHP 5.6 for Windows Server 64-bit | 32-bit
2. MariaDB 5.5 for Windows Server 64-bit | 32-bit
3. PHP Manager for IIS (makes managing PHP on IIS much easier) here

1.2 Getting Started

At this point you should have downloaded latest version of osTicket. Uncompress the files and upload files and directories in `upload` folder to a directory of your choice on your server. For example `/osticket/`, `/helpdesk/` or `/support/` depending on your preference. Basic knowledge of using FTP is a plus at this stage. If you don't know how to use FTP, we would recommend you read the documentation supplied with your FTP client and learn the basics of uploading and setting permissions on files.

osTicket installer needs to be able to write and modify `ost-config.php` found in the include directory. Please follow the instructions given by the installer.

1.3 Using Installation Script

Once all of the above steps are complete, you can complete the installation and basic setup in a web browser. You can invoke the installer by simply browsing the osTicket URL e.g `http://www.yourdomain.com/support`. Alternatively you can enter the URL to it into your browser address bar e.g `http://www.yourdomain.com/support/setup/`.

osTicket's installation script will attempt to auto-detect paths and any permission issues. Please follow the instructions to finish up the installation process.

1. If the script spots any configuration errors then it will not allow you to continue until the errors are corrected.
2. If everything checks out, you will be presented with a form to fill in the required information.
3. If any errors occurs, go back and check the data entered.
4. On valid data the script will create and populate the database plus write a configuration file.

Note that the installer performs basic configuration required to get osTicket up and running. Further configuration is required, post-install, to make the system fully functional.

1.4 Installing osTicket Using Fantastico In CPanel

osTicket can also be installed on CPanel based web hosting accounts using Fantastico.From your CPanel, click on Fantastico and follow the instructions to install osTicket.

IMPORTANT:

1. The Fantastico default installation package (as of 9 Jan 2010) installs osTicket with the default email address of support@system.com. If you install using Fantastico, you MUST immediately change your default email addresses in the main System Preferences and in your Department settings.
2. The Fantastico package for osTicket may not be as up to date as the latest release available on osTicket.com. Please check the osTicket.com website for the most up to date version.

1.5 Finishing Up

If the setup script has finished running with no errors, then congratulations osTicket is now installed. You can now log in with the username and password you created during the install process. After verifying that the installation completed correctly - your next step should be to fully configure your new support ticket system for use. But before you get to it please take a second to cleanup.

1. Change permission of include/ost-config.php to remove write access
2. Delete setup directory
3. Enable the system

Once you have done the above, you can proceed with the next step, Post-Install Setup.

HAVING TROUBLE

We can help install and configure osTicket to your needs. Please learn more about our professional installation services.

1.6 Self-Help Troubleshooting

If you can not find any solutions to the problem you are having, you can enable the "Show Errors" flags located in `/bootstrap.php` (or `/main.inc.php` in older versions):

```
# Don't Display Errors
ini_set('display_errors',0);
ini_set('display_startup_errors',0);
```

Change this to:

```
ini_set('display_errors',1);
ini_set('display_startup_errors',1);
```

Then errors should be displayed either in your web browser or in your server's `error.log` file.

Moreover, don't forget to check your osTicket Dashboard page and your mail server log.

CHAPTER 2

Post-Install Setup Guide

Once osTicket has been installed you need to further configure it via admin panel before it is fully usable. Only staff with admin's privileges can access the admin panel. Please use the username and password created during the install process.

2.1 Email Setup

Setting up your system to accept emails varies from system to system and your personal preference. osTicket allows you to route unlimited number of emails as incoming tickets. For detailed instruction please see *Email Settings Guide*.

2.2 Help Topics

In addition to emails, clients/users can also use an online form to create tickets. Help topics helps maps online inquiries to a department and assigns priority without the need for the user to select a department or/and ticket priority. This gives you ability to route inquiries without exposing internal departments.

2.3 Departments

Departments are used to categorize incoming tickets and also as access mask for staff members. For example you can restrict staff's tickets access based on departments. To manage departments go to the **Departments** tab in the **Admin Panel**.

2.4 Staff Members

osTicket allows you to add unlimited number of representatives to the system. Each staff member is assigned to a group and a department which determines the level of permission. Every staff account can be of type 'Admin' or 'Staff'.

2.5 System Preferences

To disable or change system settings, go to Settings Tab in **Admin Panel**.

CHAPTER 3

Email Settings

osTicket allows you to setup unlimited number of email addresses to handle all your company's mail accounts and email communication. Incoming emails are converted to support tickets allowing you to easily manage, organize and archive all emailed support requests in one place.

3.1 Email Templates

osTicket ships with generic email templates used for auto-responses, alerts, notices and replies. Refer to *Email Templates Guide* for details on how to customize or add new templates.

3.2 Routing Incoming Emails

Setting up your system to accept emails varies from system to system and depends on your personal preference. osTicket currently supports piping (aliases) and POP3/IMAP polling methods for routing incoming emails. Tickets are routed to the department and assigned a default priority associated with the email.

To enable incoming email fetching, in the Admin panel go to Settings and Email, and check the box for Email Fetching to enable it. It is disabled by default.

EMAIL PIPING

Piping method allows for real-time email handling. Extra setup is required at mail server level to pipe the raw email message to osTicket pipe handler. Both remote and local piping are supported. See *Email Piping Guide*.

POP3/IMAP POLLING

POP3/IMAP account polling method is best suited for individuals with remote mail account(s) and/or with limited access to mail delivery settings. Each email address added to the system can have an account associated to it. See *POP3/IMAP Setting Guide*.

3.3 Outgoing Emails

By default osTicket uses native PHP Mail function to send outgoing emails. However, this can be problematic to spam filters depending on your php.ini mail settings. It is highly recommended that you use SMTP instead.

Each of the email accounts can have it's own SMTP. You can also setup a default SMTP system wide. See Settings tab in admin panel.

IMPORTANT NOTE REGARDING USE OF EXTERNAL SMTP SERVERS

Some hosting companies (Hostgator.com, for example) do not allow the use of SMTP servers located on a separate server and will block all requests. Trying to connect to a blocked external SMTP server will result in a "login failure" message in OSTicket when trying to save the Outgoing Emails settings.

If you have shell access with your hosting account you can manually test a connection to a remote SMTP server from the command line using telnet:

```
telnet smtp.example.com 25
```

A blocked connection will result in a message similar to the following:

```
Trying 192.0.32.10...
telnet: connect to address 192.0.32.10: Connection refused
```

OUTGOING SMTP SPOOFING

Check "Allow spoofing (No Overwrite)" in `Settings => Email Settings`

3.4 Gmail Configuration

In order to use Gmail, your host must support SSL, so osTicket can negotiate the secure connection, and you must enable IMAP or POP in your GMail or GApps account. Configure in osTicket (the easy part)

Under Admin panel -> Emails -> Emails -> Sending email via SMTP For most people, enter either ssl://smtp.gmail.com with port 465 or tls://smtp.gmail.com with port 587.

note: If you have a google apps/G-Suite account, this might change, see below.

Select "Authentication Required". Leave Header Spoofing unchecked. Make sure your username is your full email and password are set correctly in the Email Login Information

If you test at this point and it doesn't work, continue reading.

You may need to consult your PHP error log (the location varies by OS and personal preferences so consult your php.ini to determine its location). The PHP error log often contains more information as to why something is not working correctly.

Check your Firewall

Connection Refused errors are most likely caused by your firewall.

If you are running csf, it defaults to block outgoing SMTP connections. You can either turn off SMTP_BLOCK (not recommended) or add the user osTicket is running under to SMTP_ALLOWUSER. Also make sure the port you are using (465 or 587) is in SMTP_PORTS.

If you are running some other firewall, make sure it is allowing outgoing connections on 465 or 587.

note: if you are running SELinux please disable it to see if that makes this start working. If it does then SELinux is blocking the connection and you will need to re-enable it and write a rule to allow the connection.

Check Gmail

Not related to SMTP, but make sure you enabled IMAP or POP3 from Settings -> Forwarding and POP/IMAP

To enable POP for your Gmail account.

To enable IMAP for your Gmail account.

You may need to "allow less secure apps". From gmail, click your avatar at the top right of the page and click "My Account". In the left menu, under Sign-In & Security, click "Connected Apps and Sites". Scroll down to "Allow less secure apps" and turn it on and retest.

It is recommended to not leave this on unless necessary.

Check your G-Suite policies

G-Suite allows you to use their SMTP Relay service. This service allows you to open up SMTP under certain conditions. To use this service, you must configure it under Apps -> G-Suite > Gmail > Advanced Settings -> General Settings -> Routing Add an SMTP relay service with the appropriate settings. Make sure you change your osTicket configuration to use smtp-relay.gmail.com as the SMTP server.

See https://support.google.com/a/answer/2956491?hl=en for more information.

CHAPTER 4

Email Templates

osTicket relies on predefined templates when sending out auto responses, notices and alerts. Each template has a set of variable placeholder as shown below.

4.1 Variables

BASE VARIABLE

%{ticket.id}	Ticket ID (internal ID)
%{ticket.number}	Ticket number (external ID)
%{ticket.email}	Email Address
%{ticket.name}	Full Name
%{ticket.subject}	Subject
%{ticket.phone}	Phone Number | ext
%{ticket.status}	Status
%{ticket.priority}	Priority
%{ticket.assigned}	Assigned Staff and/or Team
%{ticket.create_date}	Date Created
%{ticket.due_date}	Due Date
%{ticket.close_date}	Date Closed
%{ticket.auth_token}	Auth. Token used for auto-login
%{ticket.client_link}	Client's Ticket View Link
%{ticket.staff_link}	Staff's Ticket View Link

EXPANDABLE VARIABLES

%{ticket.dept}	Department
%{ticket.staff}	Assigned/Closing Staff
%{ticket.team}	Assigned/Closing Team
%{ticket.thread}	Ticket Thread
%{ticket.topic}	Help topic
%{ticket.user}	Ticket Owner

OTHER VARIABLES

%{message}	Incoming Message
%{response}	Outgoing Response
%{comments}	Assign/Transfer Comments
%{note}	Internal Note (expandable)
%{assignee}	Assigned Staff/Team
%{assigner}	Staff Assigning the Ticket
%{signature}	Staff/Dept Signature (selection)
%{url}	osTicket's Base URL (FQDN)

NEW VARIABLES

%{ticket.thread.complete}	Thread Correspondance
%{ticket.thread.complete.reversed}	Thread Correspondance in reversed order

4.2 Variable Contexts

Please note that only known (supported) variables are substituted. Non-base variables depends on the context of template type to which they are used.

1. **New Ticket Auto Response:** Autoresponse sent to user/client on new ticket if enabled. Meant to give the user the ticket ID which can be used to check the status of the ticket.
2. **New Message Auto Response:** Confirmation sent to user when a new message is appended to an existing ticket. This can be emailed or web-based replies.
3. **Over Limit Notice:** Ticket denied notice. This is a one time notice sent when the user has reached the max allowedopen tickets defined in preference section. Reasonable limit helps control spam and possible email flood loops.
4. **Ticket Response/Reply:** Message template used when responding to a ticket or simply alerting the user about a response/answer availability.
5. **New Ticket Alert:** Alert sent to staff on new ticket.
6. **New Message Alert:** Alert sent to staff when user replies to an existing ticket.
7. **New Internal Note Alert:** Alert sent to selected staff (if enabled) when an internal note is appended to a ticket.
8. **Assigned Ticket Alert:** Alert sent to staff on ticket assignment.
9. **Overdue/Stale Alert:** Alert sent to staff on stale or overdue ticket.

CHAPTER 5

POP3/IMAP Settings Guide

If email piping is not a preferred option for you or if your hosting provider does not support it, you may use POP3/IMAP account polling instead. osTicket will poll an external POP3/IMAP account on a regular basis, retrieve email messages and convert them to tickets. It is best suited for individuals with remote mail account(s) and/or limited access to mail delivery settings.

1. Enable mail fetch in `Admin Panel => Settings => Email Settings`
2. Refer to your hosting manual or contact your hosting provider for host name and port number
3. Configure fetch frequency for each of the accounts - 5 minutes recommended
4. Enable *Delete fetched message(s)* - if your mail server doesn't support auto-archiving on fetch

5.1 Schedule Polling

IMPORTANT: Simply checking `Admin Panel => Settings => Email Settings => Enable POP/IMAP email fetch` will not cause osTicket to automatically poll a mailbox for new messages. Account polling, unlike email piping, requires that a mail fetcher (script) be scheduled for repeated execution. Choose one of the methods below depending on your hosting environment.

RECURRING TASKS SCHEDULER (CRON JOB)

This is the most convenient method if your hosting provider allows scheduling recurring tasks via crontab on nix or "Scheduled Tasks" on a Windows server. Please refer to your hosting manual or contact your hosting provider for instructions. The PHP CLI executable is called to run cron.php.

Add the following entry to cron file normally in /etc/crontab in nix systems and adjust: the time; the webuser; and paths accordingly.

```
*/5 * * * * nobody /path/to/php /path/to/api/cron.php
```

For windows users in "Scheduled Tasks" add `"c:\php\bin\php.exe c:\website\osticket\api\cron.php"`

RECURRING TASKS SCHEDULER (HOST'S CUSTOM TASK SCHEDULER)

Some hosts do not allow adding cron jobs, and instead only allow you to probe scripts located at a publicly accessible URL. In this case, you will schedule the task using your webhost's scheduling interface and http://domain/path/to/osticket/api/cron.php.

To prevent unauthorized execution of scripts from the outside, `Settings => API` has rules for allowing external access based on originating IP and an API "passphrase", which is actually the User Agent string of the agent trying to access cron.php on your web server.

If the User Agent string is not changed to the API key, the request will be denied, email will not be polled, and `API error - code #77: Unknown remote host 181.222.32.12 or invalid API key [Mozilla/5.0 (X11; U; Linux x86_64; en-US) AppleWebKit/534.13 (KHTML, like Gecko) Chrome/9.0.597.84 Safari/534.13]` will appear in your system logs under the osTicket dashboard.

If your host allows you to modify their schedulers User Agent string, then change that to the API key and add your webhost scheduler's IP to `Settings => API => API Keys`.

EXTERNAL TRIGGERING USING WGET

First add an API key and IP to `Settings => API => API Keys`.

1. Enter the IP of the host that the wget will run from.
2. Enter 3 separate words into the passphrase box (these are used in conjunction with the IP to generate hashes)
3. Click submit
4. A hash will be generated

Then, setup a cron job to run wget `*/5 * * * * nobody wget -q -O /dev/null --user-agent=<API key here> http://<host & path goes here>/api/cron.php`

See forum post.

AUTO CRON

This is internal task manager triggered by staff's activity, no external setup required! If enabled, emails are fetched based on activity of a logged in staff member at an interval set for each of the email accounts.

1. Enable in `Admin Panel => Settings => General Settings`
2. Please note that nothing happens if no one is logged in.
3. It might slow the page load a little in some instances.
4. Maximum of one cron call every 3 minutes per staff

CHAPTER 6

Email Piping

The email piping is a technique of sending email message as an input to a program rather than appending the message to the mailbox file, allowing for real-time email delivery and handling. Every mail server has its own rules and procedures for mail delivery, making it hard to provide common instructions for configuring an MTA. You should refer to your hosting manual or contact your hosting provider for email piping instructions if none of the methods below works for you.

1. osTicket supports both remote and local piping
2. Email piping must be enabled in admin panel Note: This option appears to be removed from v1.7 - piping works without enabling.

6.1 Local Piping

Local piping refers to the case where osTicket is installed on a server also handling your emails. Most shared hosting users fall into this category.

SETTING UP ALIASES IN CPANEL

Add a forwarding rule for each of the email addresses to `/path/to/api/pipe.php`.

For example forward support@domain.com to `"|/path/to/api/pipe.php"`

CPANEL X INSTRUCTIONS

CPANEL -> Email -> Forwarders -> Add Forwarder

1. Address to a forwarder: @domain
2. Advanced Options -> Pipe to a Program: `public_html/osticket/api/pipe.php`
3. Click 'Add Forwarder' button

When complete you will see:

`@domain to |/home//public_html/osticket/api/pipe.php`

1. assumption is you unpackaged osticket.tar in /home/USERNAME/public_html/

2. Pipe to a Program path: if you have a leading '/' cPanel will use the path you enter, if you do not have '/' cPanel will create it relative to your home directory
3. pipe.php should have hashbang at the top of the file: #!/usr/bin/php -q
4. Make pipe.php executable chmod 755 pipe.php
5. Enable email piping in admin panel Settings -> preference Note: This option appears to be removed from v1.7 - piping works without enabling.

MAIL DELIVERY FAILED

If you have the error: 'Mail delivery failed: returning message to sender' but the user's email is still successfully processed.

You have some options:

1. Update php.ini

/usr/local/lib/php.ini update: display_errors Off

restart apache

2. Update exim.conf

Update /etc/exim.conf in the section:

address_pipe:

```
driver = pipe
return_output
```

virtual_address_pipe:

```
driver = pipe
group = "${lookup{$domain}lsearch* {/etc/userdomains}{$value}}"
return_output
user = "${lookup{$domain}lsearch* {/etc/userdomains}{$value}}"
```

Change **return_output** to **return_fail_output**

REASON: (from exim.conf comment)

If the pipe generates any standard output, it is returned to the sender of the message as a delivery error. Set return_fail_output instead of return_output if you want this to happen only when the pipe fails to complete normally. You can set different transports for aliases and forwards if you want to - see the references to address_pipe below.

SETTING UP ALIASES WITH QMAIL

Create/Edit your `.qmail-*` for the domain you wish to forward and add a forwarding rule to `/path/to/api/pipe.php`. For example for support@domain.com .qmail-support file should contain `|/path/to/api/pipe.php`

SETTING UP ALIASES FOR SENDMAIL

Modify your aliases file by adding `support:  root, |/path/to/api/pipe.php` and run newaliases.

SETTING UP ALIASES IN .PROCMAILRC

```
:0 c
   * ^To.*support@domain.com
   |/path/to/api/pipe.php
```

SETTING UP ALIASES IN PLESK (POSTFIX)

See this blog post from Dave.

Remote Piping

Remote piping is useful when osTicket installation and the mail server are on two separate machines. To maintain logic in one place remote piping is done over HTTP post to osTicket's API. osTicket ships with two scripts to help you accomplish this task; `automail.php` and `automail.pl`. Both accomplish the same task by posting to http://www.yourdomain.com/osticket/api/tickets.email (replace osticket with the folder name where you installed osticket)

1. Remote host IP must be white listed in Admin Panel > Manage > API Keys
2. Valid API key required
3. Follow local piping instructions above to pipe emails to remote script which will in turn post to osTicket

For technical details, please refer to API Docs.

CHAPTER 7

Upgrade and Migration

Before embarking on an upgrade or a migration mission, it is extremely important that you backup your website's database and files. We also recommend that you take the system offline momentarily during the process. While we try to ensure that the upgrade process is straightforward and painless, we can't guarantee it will be the case for every user. For this reason it is crucial that users take precautions in case of any problems. If the thought of upgrading your installation gives you the shakes then feel free to contact us for help.

7.1 Upgrade

From time to time it will be necessary to upgrade your osTicket installation to the latest version, either to fix bugs or gain new features. Starting with version 1.6, osTicket is a complete rewrite with new database schema and code base making it hard to simply upgrade from previous versions.

1. Only previous versions from version 1.6 RC1 can be upgraded to the current version.
2. If your osTicket version is older than 1.6, you need to look into migration instead.

Our objectives is to make upgrading from an earlier release as painless as possible going forward and support migration from discontinued versions. we are working with osTicket community on the best way to upgrade or/and import data from previous versions including 3rd party helpdesk systems.

7.2 Uploading Files

After you have successfully downloaded the osTicket package to your computer you will need to prepare the files to be uploaded to your web server, where the old version of osTicket is running - overwriting the existing files. This can be accomplished by decompressing the download and then using an FTP client to transfer files in *upload directory/folder* to your server, overwriting existing osTicket files. For user using control panels like CPanel or Plesk, you can utilize the systems file manager to upload the package to your server then simply extract the package while making sure the path hierarchy is maintained.

1. Make sure you backup your site's database and files **PLEASE DO NOT SKIP**

2. Upgrader requires user with admin privileges
3. It is recommended that you take the system offline during the upgrade
4. Maintain the directory hierarchy to make sure files are overwritten
5. Upload folder contains the osTicket files that need to be uploaded to your web server.
6. Do not overwrite your ost-config.php file (in the include directory) or else you will lose your MySQL admin settings.
7. Do not upload files in scripts folder. Only useful for remote piping
8. For versions 1.6 RC1-RC2 Only: Once you've overwritten the files, rename config.php to ostconfig.php (config.php is found in root osTicket directory).
9. For newer versions the config.php or ostconfig.php file should be renamed to ost-config.php and moved to the /include folder.

Note: If you've customized your osTicket installation, you will need to port the changes to the new version following a successful upgrade. Database changes might cause conflicts.

7.3 Running Upgrade Script

osTicket ships with web-based upgrade wizard to help guide you through the upgrade process. While the wizard provides step by step guide it is important and helpful to have general knowledge about Web servers, PHP and MySQL. Any errors at this stage, although unexpected, are fatal and might require restoring previous version.

To run the upgrade script, simply login to admin panel of your osTicket helpdesk. The upgrader is now a primary component of the osTicket, so upgrades are triggered automatically anytime you upload a new version which requires a database migration.

When you access the admin panel, the upgrade wizard will be presented and will automatically walk you through the database migration process. Your helpdesk will remain offline, and your staff will be unable to do anything in the staff panel until the database migration has completed.

Warning: If you are upgrading from osTicket 1.6 to osTicket 1.7 and above, please ensure that your attachment upload folder has read and write permission for your http server software. Attachments that are not readable by the http server will be lost in the upgrade process.

7.4 Post Upgrade Testing

Once the upgrade has completed, browse to the staff control panel (scp) and check basics such as viewing and responding to test tickets to ensure things still work as expected. After verifying that the upgrade completed correctly do the following:

1. Enable the help desk
2. Delete setup directory
3. Explore any new feature—see Release Notes
4. Take a minute to send us feedback

Migration

We plan on supporting data migration from previous discontinued versions of osTicket as well as 3rd party help desks in the near future. Please check the forums for up to date discussions on the subject.

CHAPTER 8

Upgrade Overview (v1.12.2)

8.1 Features Outlined in this Document

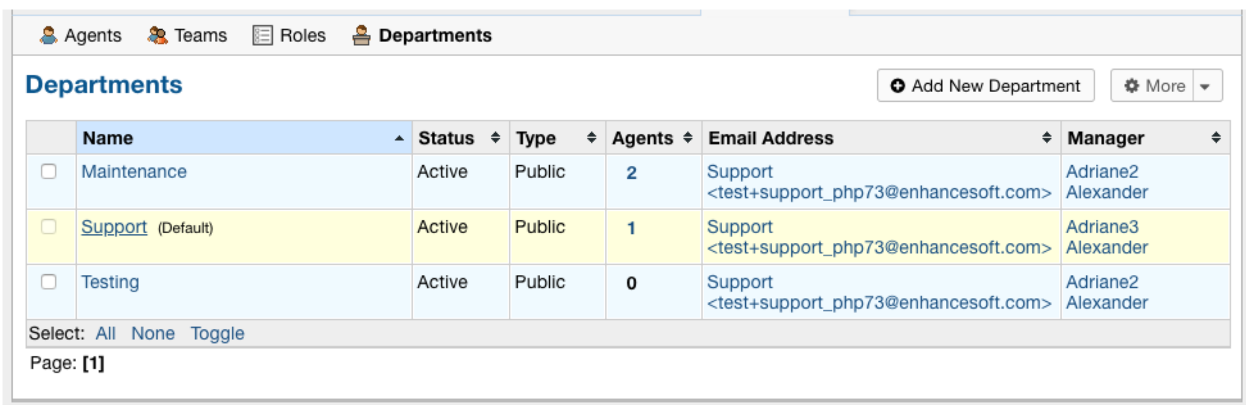
- Bug Fix: Recipients Field for Departments
- ACL (Access Control List)
- Allow iFrames
- Complete Thread Variable
- jQueryUI DateTime Picker
- Mark As Answered/Unasnwered
- Reply Redirect
- Top-Level Queue Counts
- Custom Queues and Columns
- Advanced Search
- Inline Edit
- Ticket Referral
- Collaborators
- Export Agent CSV
- Department Access CSV
- Archive Help Topics/Departments
- Nested Knowledgebase Categories
- Task Revamp
- Release Assignment
- Require Help Topic

- Dashboard Statistics
- Fix Most Redactor Issues
- Ticket Preview Custom Fields
- Fix Reset Button(s)
- Fix New Ticket Cancel Button
- Fixes issue with last_update ticket variable
- Fix DatePicker on client side
- Add Custom Forms to Ticket Filter Data

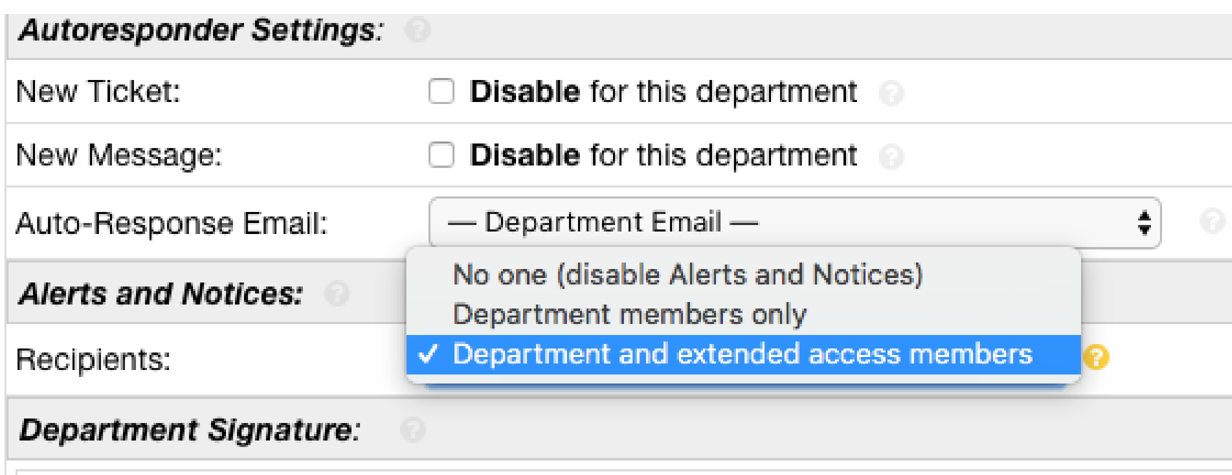
8.2 Recipients Field for Departments

Please note, we had a bug fix in this release that corrected the behavior of the Recipients field for Departments. It was incorrectly sending out alerts even if Recipients was set to ‘No one’. If you want to change the behavior of this field, you can change it by going to:

Admin Panel | Agents Tab | Departments | Select the desired department



The Recipients field is under Alerts and Notices on the form. If it is set to ‘No one (disable Alerts and Notices)’, Agents will NOT receive an alert when a Ticket is created in this Department. If it is set to ‘Department members only’, only Agents with this Department as a primary Department will receive the alert. If it is set to ‘Department and extended access members’, all Agents with access to this Department will receive the alert.



8.3 ACL (Access Control List)

Summary:

The Access Control List (ACL) feature allows you to enter a single IP address or a comma separated list of IP addresses to allow access to the system. Essentially, this means whatever IP address is in the ACL field will have access to the specified Panels of the software. If the field is left blank your helpdesk is open to the world. This feature is useful for those who wish to lock down their helpdesk to certain clients, to just their internal network or just to list of IP addresses.

Links to Documentation:

ACL (Access Control List)

8.4 Allow iFrames

Summary:

This is a setting to allow specified domains to use your helpdesk in an iFrame. By default no one is allowed to use your helpdesk in an iFrame for security purposes. If however you'd like to use your helpdesk in an iFrame on your company website/forum/etc you can enter the site domain in the Allow iFrames textbox and the site will be able to use your helpdesk in an iFrame.

Links to Documentation:

Allow iFrames

8.5 Complete Thread Variable

Summary:

This includes two new Email Template variables called `%{ticket.thread.complete}` and `%{ticket.thread.complete.reversed}`. These variables will include the entire Thread Correspondance between all Ticket participants. In lamemans terms this is the full thread history. `%{ticket.thread.complete}` will show the thread correspondance in DESC format (latest message on top and oldest message on bottom) whereas `%{ticket.thread.complete.reversed}` will show the thread correspondance in ASC format (oldest message on top and latest message on bottom).

8.6 jQueryUI DateTime Picker

Summary:

We have upgraded the measly old DatePicker to a flashy new DateTime Picker that allows you to choose the date and time all in one popup. Previously, if you had a field that collected date and times there would be one box for the DatePicker calendar and a completely separate dropdown for times. Also, with the old time selection dropdown you had to scroll through *so many* different values to find the exact time you're looking for and you couldn't just type it in. With the new DateTime picker you get one inline popup that includes a calendar for date selections, a time input box that allows you to simply type out the time you want, and two dropdowns for selecting the exact Hour and Minute (in case you didn't want to type it out).

8.7 Mark As Answered/Unasnwered

Summary:

This allows the Agent to mark the ticket as Answered or Unanswered (depending on it's current state). The Agent has to have the Post Reply permission for the Ticket's Department in order to utilize this feature.

Links to Documentation:

Mark As Answered/Unasnwered

8.8 Reply Redirect

Summary:

This setting defines where the system will redirect you after posting a Reply on a ticket. There are two options, `Queue` and `Ticket`. The default value for this setting is `Ticket`.

Links to Documentation:

Reply Redirect

8.9 Top-Level Queue Counts

Summary:

If enabled, this will show the Ticket Counts for Top-Level Queues. By default Top-Level Queues do not show their counts.

Links to Documentation:

Top-Level Queue Counts

8.10 Custom Queues and Columns

Summary:

With Custom Queues and Columns, Agents can completely customize the way they view tickets in the help desk. This feature gives Agents the freedom to create personal queues that only they can see. They can specify what the criteria is for the queue, what columns are displayed for the queue, and what quick filters they would like to see for the queue.

In addition to being able to create personal queues, Agents can also modify how existing queues show up specifically to them by editing the existing queues.

Links to Documentation:

Custom Columns & Custom Queues (Admin)

Custom Columns & Custom Queues (Agent)

8.11 Advanced Search

Summary:

Several improvements have been made to the Advanced Search to make it more user friendly and more efficient.

Links to Documentation:

Advanced Search

8.12 Inline Edit

Summary:

With Inline Edit, an Agent can modify an individual field on a ticket without having to edit the entire ticket. Within the ticket header, each field that can be edited inline is selectable (highlighted in blue) and can be changed by simply clicking the field value. Inline editing can be done on a ticket's standard fields as well as custom fields.

Links to Documentation:

Inline Edit

8.13 Ticket Referral

Summary:

The ticket referral feature allows for the ability to refer tickets (& any associated tasks) to an Agent, Team or Department who otherwise do not have access. Referrals can also be used to retain view only access to the ticket once referred rather than losing access to the ticket.

Links to Documentation:

Ticket Referral

Tests:

***Tip:** Before doing these tests, do an Agent export to get a CSV of each Agent's Department access.

Action	Steps to Follow	Expected Result(s)
Refer a ticket to an Agent who does not have access to the ticket's Department	1. Create a ticket in a Department that you can access but other Agents can not 2. Within the ticket, click 'Manage Referrals' on the More dropdown 3. Click the 'Refer' tab 4. Select 'Agent' in the Referee list 5. Select an Agent that does not have access to the Department 6. Click Refer 7. Have the referred Agent check to make sure the referred ticket is in their Queue	The referred ticket will show up in the Agent's ticket queue
Refer a ticket to a Department	1. Within the same ticket or a new ticket, click 'Manage Referrals' on the More dropdown 2. Click the 'Refer' tab 3. Select 'Department' in the Referee list 4. Select a Department 5. Click Refer 6. Have an Agent from the referred Department who can not currently access the ticket's Department check to make sure the referred ticket is in their Queue	The referred ticket will show up in the queue of every Agent in the assigned Department
Refer a ticket to a Team of Agents who do not currently have access to the ticket's Department	1. Within the same ticket or a new ticket, click 'Manage Referrals' on the More dropdown 2. Click the 'Refer' tab 3. Select 'Team' in the Referee list 4. Select a Team 5. Click Refer 6. Have an Agent from the referred Team who can not currently access the ticket's Department check to make sure the referred ticket is in their Queue	The referred ticket will show up in the queue of every Agent in the Team
As a User, reply to a ticket through email adding another Department's email to the recipients of the email	1. Within the same ticket or a new ticket, reply as an Agent so that an email will go to the ticket User (be sure that you have a way to access the User's email inbox) 2. Go to the User's email inbox and find the email Alert 3. Reply to the email and add the address for another Department in the email recipients list 4. As the Agent, go back to the ticket and click 'Manage Referrals' to ensure the Department has been referred	Any Departments that were included will now be listed as referred Departments in the ticket

8.14 Collaborators

Summary:

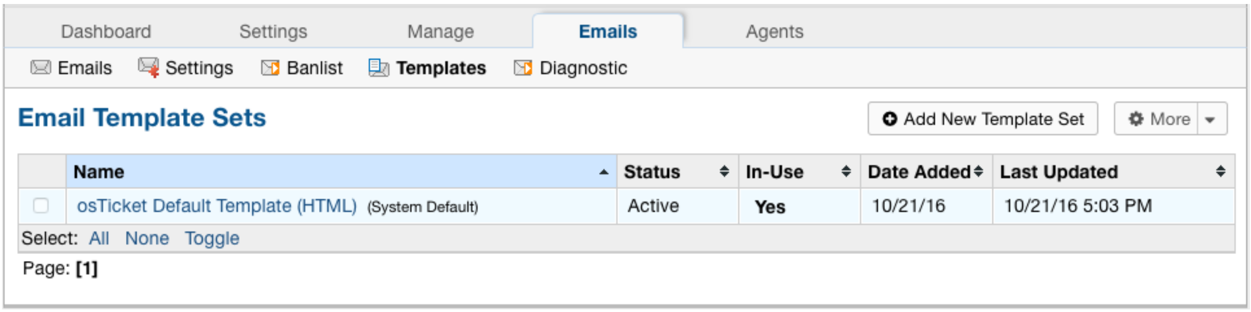
Previously, collaborators could only be added to tickets by copying someone in an email or when an Agent was posting a reply. Now collaborators can be added upon ticket creation as well.

Links to Documentation:

Collaborators

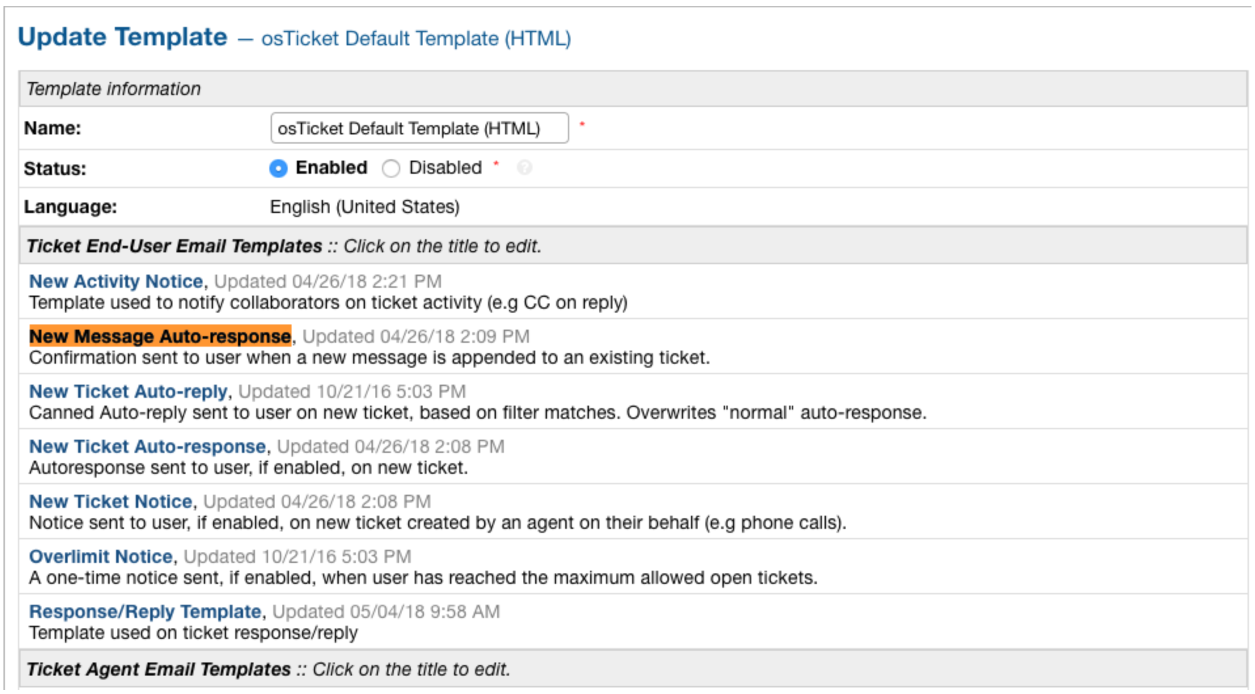
It is important to understand which email templates can be expected to go out for each scenario of this feature. The templates will determine what users will see in Alert emails that are sent out by the system. In order to see the titles of the email templates have your administrator go to:

Admin Panel | Emails | Templates | Click the active templates



From here, the administrator can see the names of each template being referred to in the below test cases.

See the example of one of the names highlighted below:



Templates used in this feature:

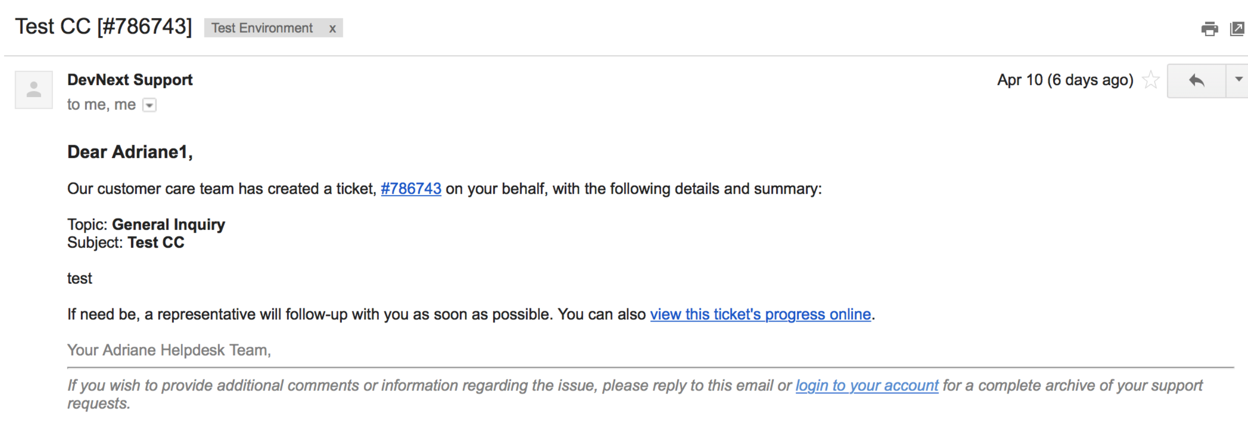
New Ticket Alert, New Ticket Auto Response, New Ticket Notice, Ticket Assignment Alert, Response/Reply Template, New Message Auto-Response, and Internal Activity Alert

Tests:

*See screenshots below for an example of the types of emails to respond to

Action	Steps to Follow	Expected Template (if Enabled)
User opens ticket through email	1. Send an email to a department	- Admin: New Ticket Alert - User: New Ticket Auto Response - Cc: None
User opens ticket through email including CC	1. Compose a new email 2. Put a department email in the To address field 3. Put a personal email in the Cc field 4. Send email	- Admin: New Ticket Alert - User: New Ticket Auto Response - Cc: None
User opens ticket from front end	1. Go to helpdesk url 2. Sign in as a User 3. Create a new ticket	- Admin: New Ticket Alert - User: New Ticket Auto Response - Cc: Not an option
Agent opens ticket on behalf of user from front end	1. Go to helpdesk url/scp 2. Log in as an Agent 3. Click New Ticket 4. Choose a User for the ticket 5. Save	- Admin: New Ticket Alert - User: New Ticket Notice - Cc: New Ticket Notice (copied on user email) - Agent: Ticket Assignment Alert (if agent assigns to someone else while creating)
User replies to ticket from front end	1. Go to helpdesk url 2. Sign in as a User that has been assigned to a ticket 3. Click one of the User's ticket 4. Reply to the ticket	- User: New Message Auto-Response - Cc: New Activity Notice (copied) - Agent: New Message Alert
User replies to ticket from email	1. Go to your email inbox and look for an email template that was sent to a user when a ticket was created for them 2. Reply to that email	- User: New Message Auto-Response - Cc: None - Agent: New Message Alert
Agent replies to user (front end only option)	1. Go to helpdesk url/scp 2. Log in as an Agent 3. Click on one of the Tickets that have already been created 4. Reply to the ticket	- User: Response/Reply Template - Cc: Response/Reply Template (copied on user email) - Agent: None
Cc reply from front end	1. Go to helpdesk url 2. Sign in as a User that has been added as a Cc collaborator to a ticket 3. Click one of the Collaborator's tickets 4. Reply to the ticket	- User: New Activity Notice (Cc'd) - Cc Poster: New Message Auto-Response - Cc: New Activity Notice (copied on user email) - Agent: New Message Alert
Cc reply from email	1. Go to your email inbox and look for an email template that was sent to a Cc'd Collaborator when a ticket was responded to 2. Reply to that email	- User: None - Cc Poster: New Message Auto-Response - Cc: None - Agent: New Message Alert
Agent writes an internal note	1. Go to helpdesk url/scp 2. Log in as an Agent 3. Click a ticket 4. Click the Post Internal Note tab 5. Post the internal note	- User: None - Cc: None - Agent: Internal Activity Alert

Email template that was sent to a user when a ticket was created for them:



Test CC [#786743] Test Environment x

DevNext Support Apr 10 (6 days ago)
to me, me

Dear Adriane1,

Our customer care team has created a ticket, #786743 on your behalf, with the following details and summary:

Topic: **General Inquiry**
Subject: **Test CC**

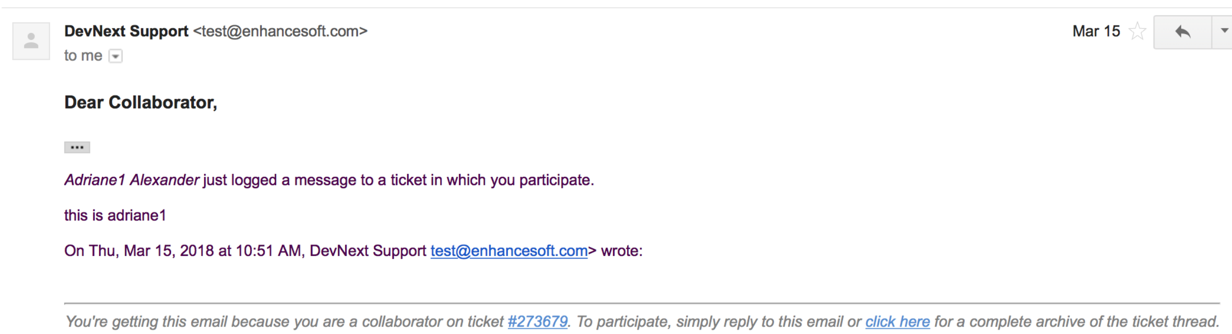
test

If need be, a representative will follow-up with you as soon as possible. You can also view this ticket's progress online.

Your Adriane Helpdesk Team,

If you wish to provide additional comments or information regarding the issue, please reply to this email or login to your account for a complete archive of your support requests.

Email template that was sent to a Cc'd Collaborator when a ticket was responded to:



DevNext Support <test@enhancesoft.com> Mar 15
to me

Dear Collaborator,

...

Adriane1 Alexander just logged a message to a ticket in which you participate.

this is adriane1

On Thu, Mar 15, 2018 at 10:51 AM, DevNext Support test@enhancesoft.com> wrote:

You're getting this email because you are a collaborator on ticket #273679. To participate, simply reply to this email or click here for a complete archive of the ticket thread.

***Note:** You can look for the email that went to the email address assigned to the Cc collaborator you chose.

8.15 Export Agent CSV

Summary:

Administrators are now able to download a CSV export that displays all Agents in the system as well as their access to each Department.

Links to Documentation:

Agent CSV Export

8.16 Department Access CSV

Summary:

Admins are now able to download a CSV export of which agents can access different departments.

Links to Documentation:

Department CSV Export

8.17 Archive Help Topics/Departments

Summary:

Occasionally it could become necessary to no longer use certain Departments or Help Topics within a helpdesk. Even though they will no longer be used in the future, there could be some Tickets that are still assigned to the Department or Help Topic. In addition, there are important Dashboard Statistics already stored. To resolve these issues, Admins may now choose to Archive Departments or Help Topics.

Links to Documentation:

Department Help Topic Archiving

Tests:

Departments:

Action	Steps to Follow	Expected Result(s)
Create a ticket in a Department you will plan to Archive	1. Go to: Agent Panel | Tickets | New Ticket 2. Choose the Department you will archive OR 1. Create an email and send it to the Department you will Archive	A new ticket will exist in the Department chosen
Archive a Department	1. Go to: Admin Panel | Agents Tab | Departments 2. Choose a Department 3. Choose 'Archived' in the Status Dropdown 4. Save Changes *Be sure to choose a Department that you can send emails to for future steps below	When viewing the list of Departments, the Status column should say 'archived' for the modified Department
Check the Archived Department in the Agent Dashboard	1. Go to: Agent Panel | Dashboard	The Department should show up as 'Department - Archived' in the Department column
Make sure the Archived department is not in the list when opening a new ticket	1. Go to: Agent Panel | Tickets | New Ticket 2. Look at the Departments listed in the Department dropdown	The name of the Archived Department should NOT show up in the list
Email in a ticket to the Archived Department	1. Create an email and send it to the Department you Archived	The new ticket that has been created should be assigned to the default Department, NOT the Archived Department
Close the ticket that was created in step 1	1. As an Agent, go to the ticket created in step 1 (which should still be in the Archived Department) 2. Close the ticket	- The ticket should still be in the Archived Department. - It should have a message at the bottom that reads 'Current ticket status (Closed) does not allow the end user to reply.'
As a User, reply to the ticket created in the ticket from step 1. This ticket should still be in the Archived Department	1. Log into the Client Portal as the User assigned to the ticket 2. Respond to the ticket OR 1. Respond to the ticket as the User by email	- A new ticket should have been created in the default Department - The subject of the new ticket should say 'Re:' + subject of ticket in archived department + ticket # of ticket in archived department
Create a ticket in a Department you will plan to Disable	1. Go to: Agent Panel | Tickets | New Ticket 2. Choose the Department you will archive OR 1. Create an email and send it to the Department you will Disable *Note: Be sure to check that the email for this Department is still set to the correct Department and not the Default Department	A new ticket will exist in the Department chosen
Disable a Department	1. Go to: Admin Panel | Agents Tab | Departments 2. Choose a Department 3. Choose 'Disabled' in the Status Dropdown 4. Save Changes *Be sure to choose a Department that you can send emails to for future steps below	When viewing the list of Departments, the Status column should say 'disabled' for the modified Department
Check the Disabled Department in the Agent Dashboard	1. Go to: Agent Panel | Dashboard	The Department should show up as 'Department - Disabled' in the Department column
Make sure the Disabled Department is not in the list when opening a new ticket	1. Go to: Agent Panel | Tickets | New Ticket 2. Look at the Departments listed in the Department dropdown	The name of the Disabled Department should NOT show up in the list
Email in a ticket to the Disabled De-	1. Create an email and send it to the	The new ticket that has been cre-

Help Topics:

Action	Steps to Follow	Expected Result(s)
Create a ticket in a Help Topic you will plan to Archive	1. Go to: Agent Panel | Tickets | New Ticket 2. Choose the Help Topic you will archive	A new ticket will exist in the Help Topic chosen
Archive a Help Topic	1. Go to: Admin Panel | Manage | Help Topic 2. Choose a Help Topic 3. Choose 'Archived' in the Status Dropdown 4. Save Changes	When viewing the list of Help Topics, the Status column should say 'archived' for the modified Help Topic
Check the Archived Help Topic in the Agent Dashboard	1. Go to: Agent Panel | Dashboard	The Help Topic should show up as 'Help Topic - Archived' in the Topics column
Make sure the Archived Help Topic is not in the list when opening a new ticket	1. Go to: Agent Panel | Tickets | New Ticket 2. Look at the Help Topics listed in the Help Topic dropdown	The name of the Archived Help Topic should NOT show up in the list
Close the ticket that was created in step 1	1. As an Agent, go to the ticket created in step 1 (which should still be in the Archived Help Topic) 2. Close the ticket	- The ticket should still be in the Archived Help Topic. - It should have a message at the bottom that reads 'Current ticket status (Closed) does not allow the end user to reply.'
As a User, reply to the ticket created in the ticket from step 1. This ticket should still be in the Archived Help Topic	1. Log into the Client Portal as the User assigned to the ticket 2. Respond to the ticket OR 1. Respond to the ticket as the User by email	- A new ticket should have been created in the default Help Topic - The subject of the new ticket should say 'Re:' + subject of ticket in archived Help Topic + ticket # of ticket in archived Help Topic
Create a ticket in a Help Topic you will plan to Disable	1. Go to: Agent Panel | Tickets | New Ticket 2. Choose the Help Topic you will disable	A new ticket will exist in the Help Topic chosen
Disable a Help Topic	1. Go to: Admin Panel | Manage | Help Topic 2. Choose a Help Topic 3. Choose 'Disabled' in the Status Dropdown 4. Save Changes	When viewing the list of Help Topics, the Status column should say 'disabled' for the modified Help Topic
Check the Disabled Help Topic in the Agent Dashboard	1. Go to: Agent Panel | Dashboard	The Help Topic should show up as 'Help Topic - Disabled' in the Topics column
Make sure the Disabled Help Topic is not in the list when opening a new ticket	1. Go to: Agent Panel | Tickets | New Ticket 2. Look at the Help Topics listed in the Help Topic dropdown	The name of the Disabled Help Topic should NOT show up in the list
Close the ticket that was created before disabling the Help Topic	1. As an Agent, go to the ticket created in step 1 (which should still be in the Disabled Help Topic) 2. Close the ticket	The ticket should still be in the Archived Help Topic.
As a User, reply to the ticket created before the Help Topic was disabled. This ticket should still be in the Disabled Help Topic	1. Log into the Client Portal as the User assigned to the ticket 2. Respond to the ticket OR 1. Respond to the ticket as the User by email	- The ticket should have an event that says 'Reopened by SYSTEM' - The response should be threaded into the ticket

8.18 Task Revamp

Summary:

The Task Revamp improves upon the current functionality of tasks by adding the following:

- Ability to create a Task from a ticket thread
- Task due date must be before ticket due date
- Add an Internal Note to the Ticket when a Task is completed
- Send an Alert to the Assigned Agent/Team when task is complete

Links to Documentation:

Task Revamp

8.19 Release Assignment

Summary:

The Release Assignment feature has been with us for a while but only Department Managers can utilize it. We thought this was bogus so we improved upon the current functionality by adding the following:

- Release Role Permission (any agent with this permission can release assignment)
- Updated Release modal that gives the option to chose whom to release assignment from
- TextBox to optionally input a reason for releasing the assignment (saves as Internal Note)
- Thread Event for showing who released whose assignment along with a date and time stamp

Links to Documentation:

Release Assignment

8.20 Require Help Topic

Summary:

Admins now have the option to require a Help Topic before a Ticket can be closed.

Links to Documentation:

Require Help Topic

8.21 Nested Knowledgebase Categories

Summary:

Agents now have the ability to further organize their Knowledgebase by nesting categories beneath each other.

Links to Documentation:

Nested Knowledgebase Categories

8.22 Dashboard Statistics

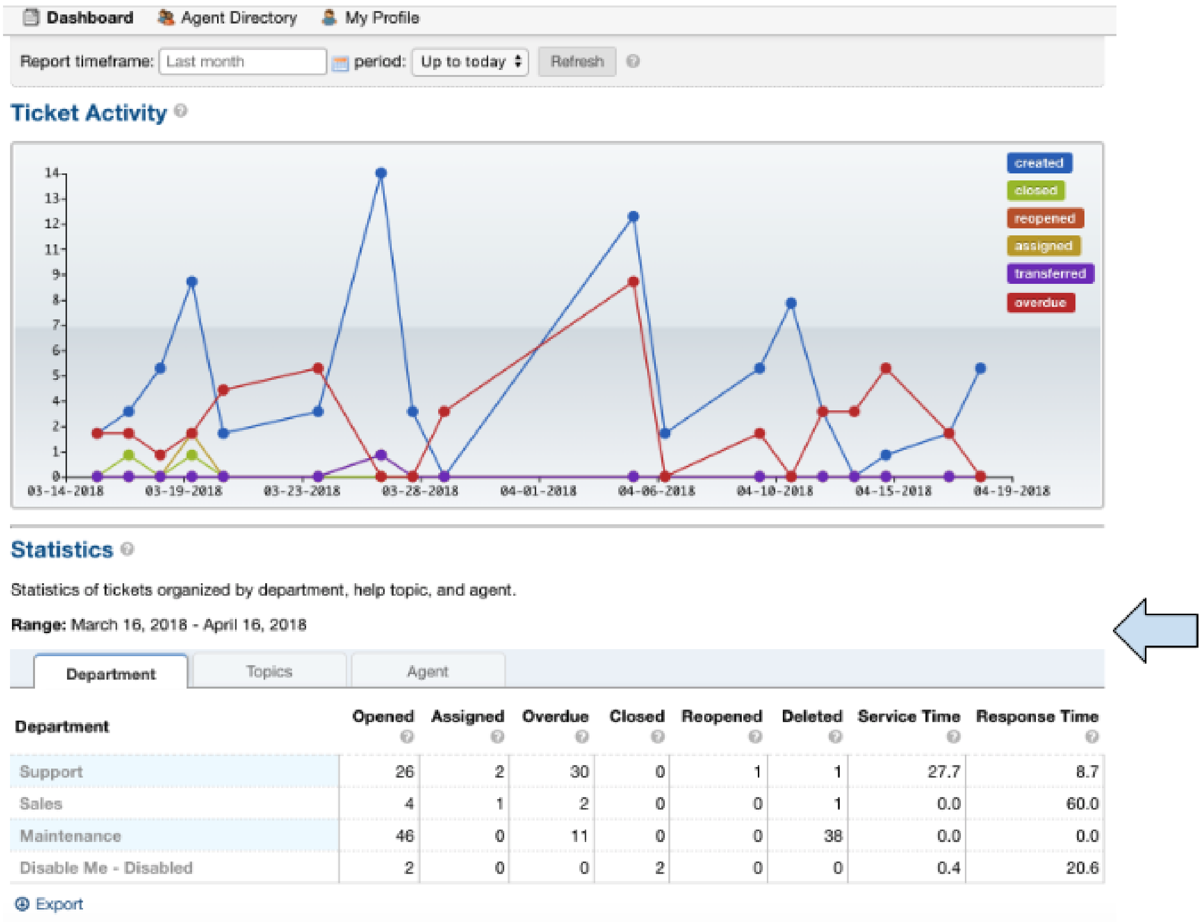
Summary:

The Agent Dashboard has been updated to show what range of dates are being viewed, help tips are now displayed below each column in the table, a Deleted column has been added, and the calculations for Service and Response time have been improved.

Links to Documentation:

Dashboard Statistics

Overall View:



***Note:** The range of dates is changed using the 'Report Timeframe' at the top of the page.

Service Time

Refers to the duration of time that begins at the opening of a ticket and ends when the ticket is closed without being reopened again. The Service Time column measures the average Service Time per ticket, in hours, within the specified date span.

Response Time

Shows an average of the number of hours between when a user posted a message on a ticket and when an agent responded/replied to the customer.

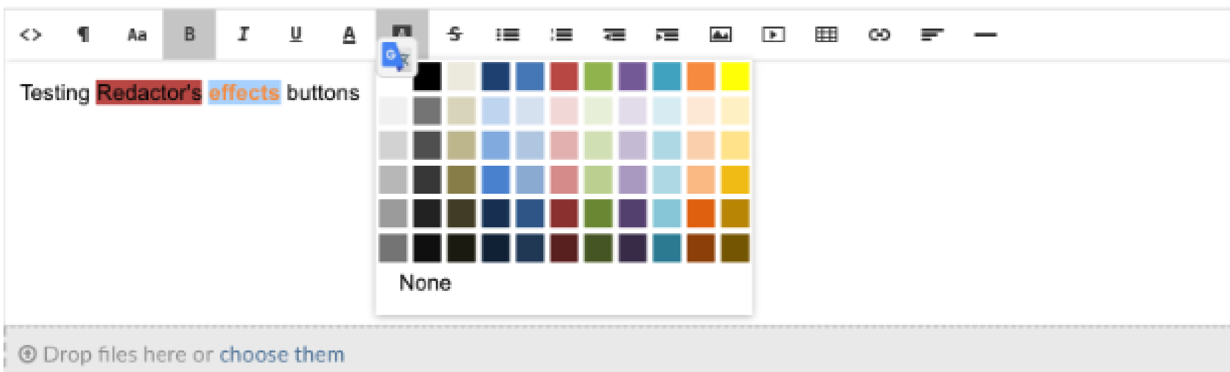
8.23 Fix Most Redactor Issues

Summary:

Previously, the text editor buttons didn't work properly, like the Bold, Italics, Underline, etc. Instead of using the buttons like you would think (ie. highlight the text and click the button), you had to highlight the text, cut the text, click the button you desired (like Bold), and then paste the original text back in. This version added a fix to make the buttons work like intended.

Tests:

1. Login to helpdesk.
2. Click on any ticket.
3. Start typing a reply in the reply box.
4. Highlight some text.
5. Click Bold, Italics, etc.
6. See if the text takes on the new styling.



8.24 Fix Reset Button(s)

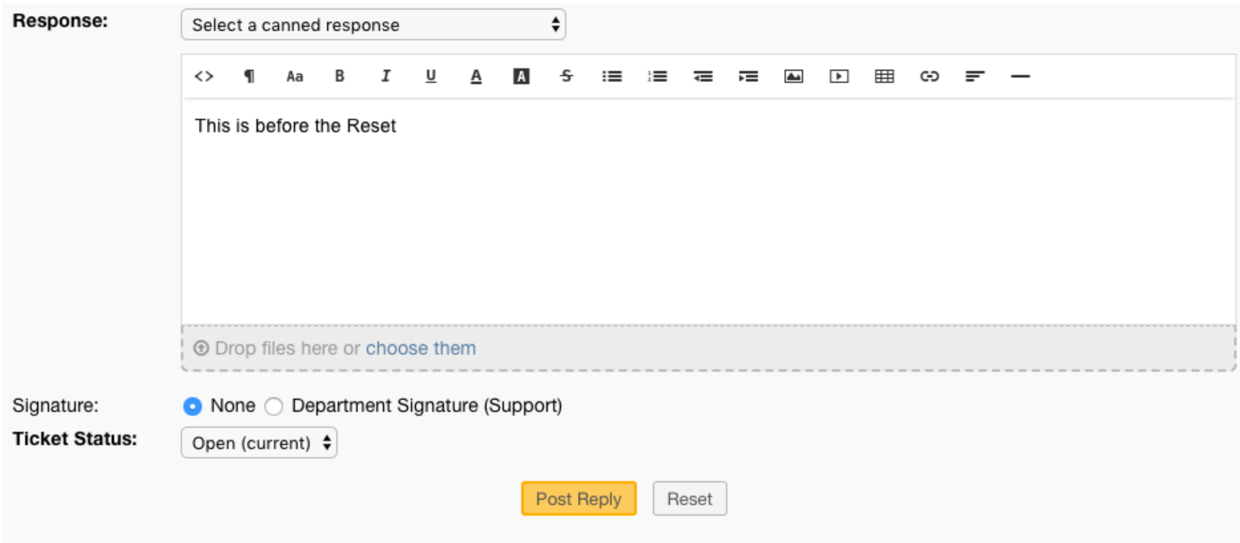
Summary:

Previously the Reset buttons on Tickets never worked. If you clicked Reset nothing would happen at all. This version fixed the Reset buttons on tickets so that text in the reply box is reset and the draft (if any) is deleted.

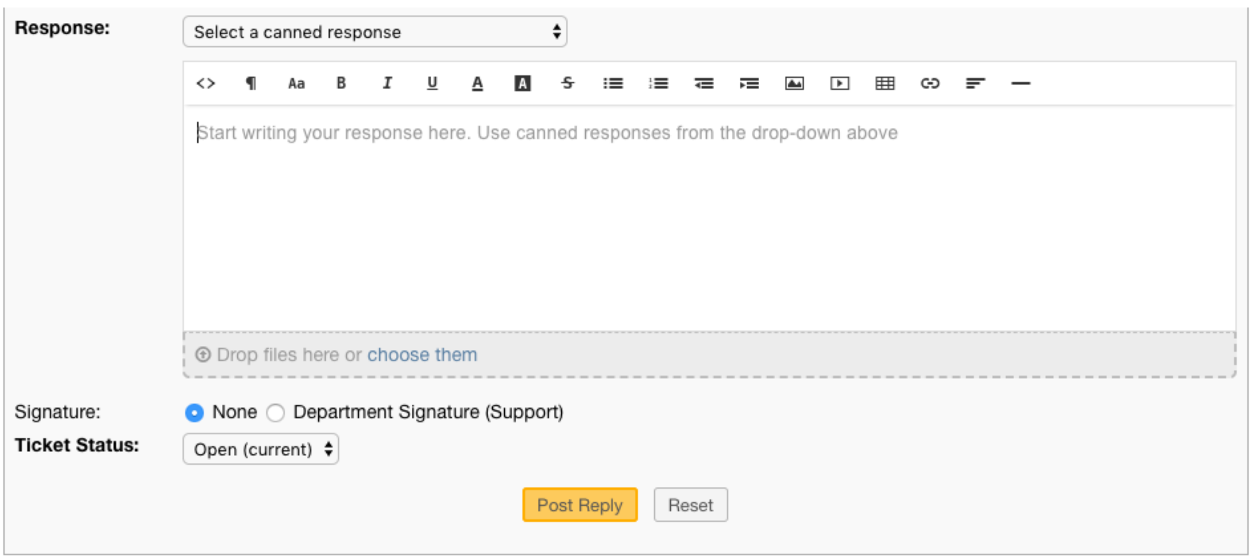
Tests:

1.Login to helpdesk. 2. Click any ticket. 3. Insert text into the Reply box. 4. Wait 30 seconds for the draft to save. 5. Type in more text and wait an additional 30 seconds for the draft to save again. 6. You should now see a delete icon in the top right corner of the Reply box. 7. Click **Reset** and see if the text was removed and the delete icon went away. If so it was successful.

Before



After



8.25 Fix New Ticket Cancel Button

Summary:

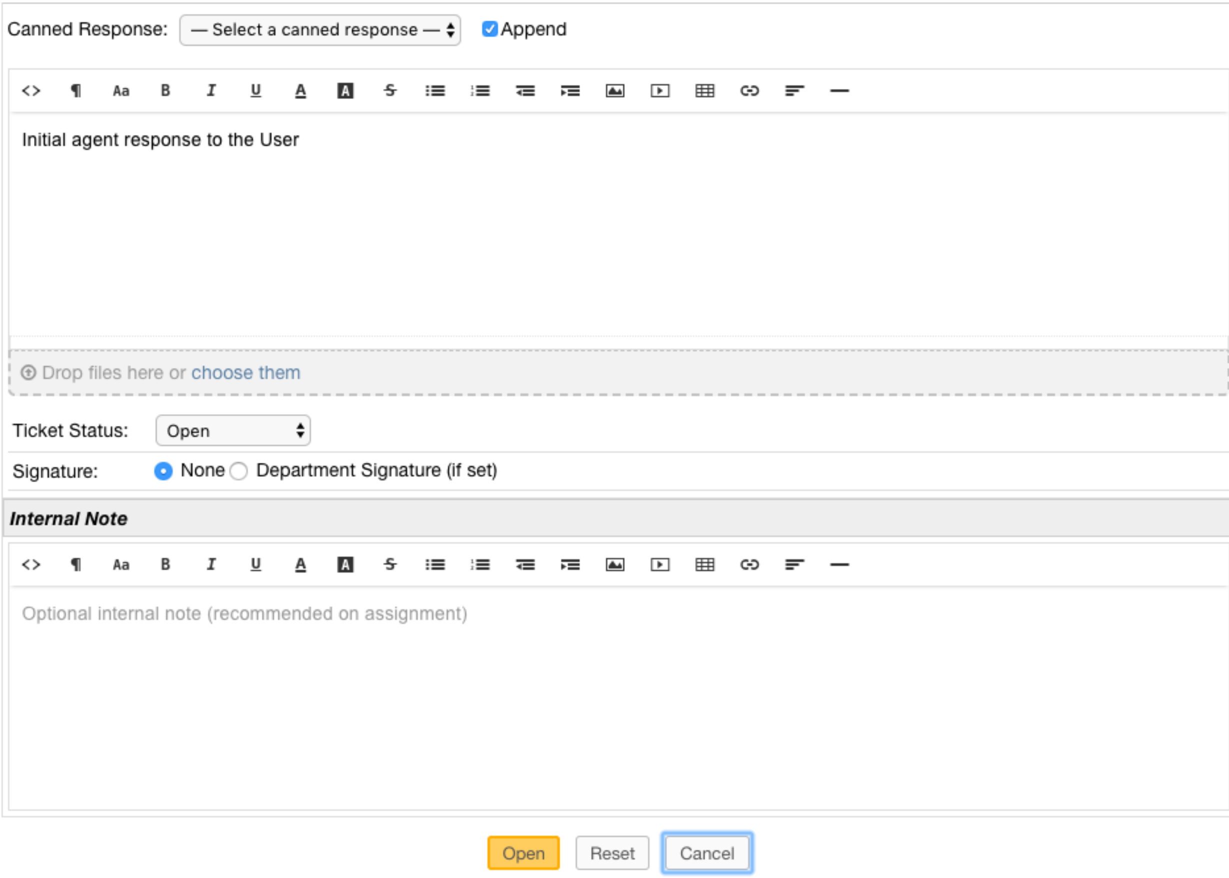
Previously the Cancel button on New Ticket creation never worked. If you clicked Cancel nothing would happen at all. This version fixed the Cancel button on New Ticket creation so everything entered would be canceled/reset and the page would redirect back to the ticket queue.

Tests:

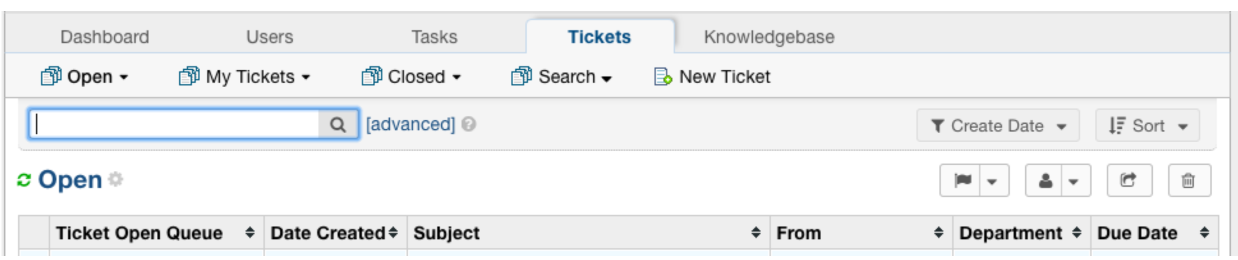
1. Login to helpdesk.
2. Click the **New Ticket** button.
3. Start to fill out the New Ticket forms.
4. Scroll to the bottom of the page.

5. Click **Cancel** and see if all the fields were canceled/reset and the page redirects to the ticket queue.

Before



After



8.26 Fix %{ticket.last_update} Ticket Variable

Summary:

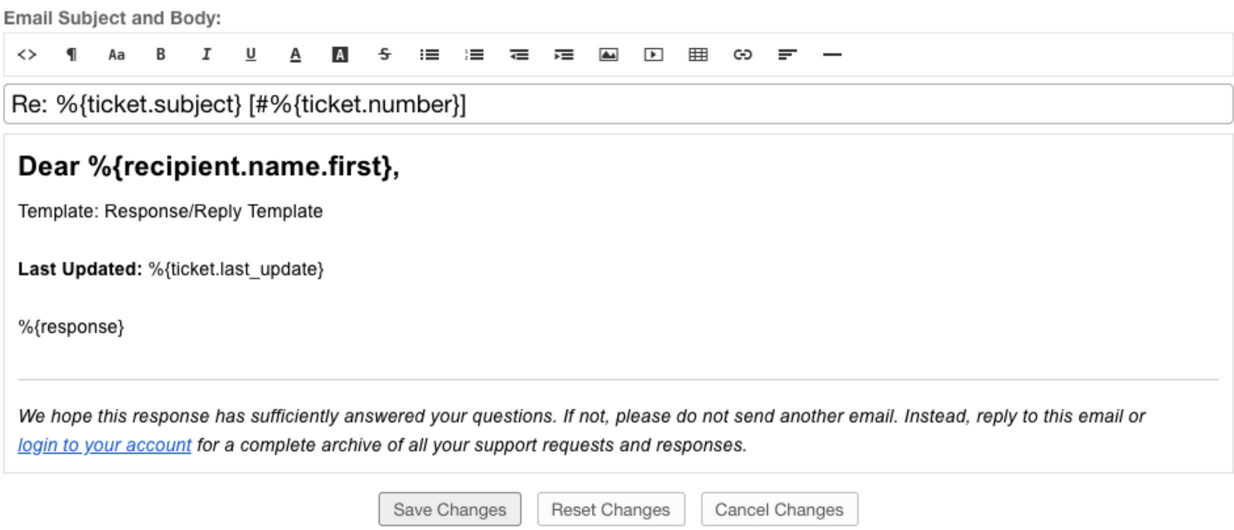
The %{ticket.last_update} variable is used to show the User/Agent when the ticket was last updated. Previously, the %{ticket.last_update} ticket variable didn't work. This was due to a small typo in the code. This version corrected the typo and fixed the variable.

Tests:

1. Login to helpdesk.

2. Go to **Admin Panel > Emails > Templates.**
3. Click the **System Default** Template Set.
4. Click the **Response/Reply Template**
5. Add **%{ticket.last_update}** anywhere in the body.
6. Save Changes.
7. Create a test-ticket using a personal email for the User's email.
8. Respond back to that test ticket as Agent.
9. View the email you get as a User to see if the variable was replaced by an actual date.

Template



Result

Dear Adriane,

Template: Response/Reply Template

Last Updated: 04/16/2018 3:16PM

test

8.27 Fix DatePicker (Client Side)

Summary:

Previously, occasionally date picker fields on the Client Side would duplicate the days/months in the date string so the result would be something like "0404/0101/2018". This version fixed the date pickers so it wouldn't duplicate anything in the string giving you the correct date string.

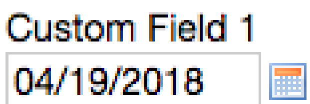
Tests:

1. Login to helpdesk.
2. Go to **Admin Panel > Manage > Forms**
3. Click **Ticket Details** Form.

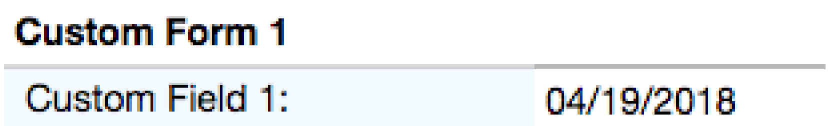
4. Add a custom field that is of type "Date and Time".
5. Save Changes.
6. Go to Client Portal.
7. Open a New Ticket.
8. Add a date to the new custom field.
9. Create the ticket and make sure the date for that field in the header is formatted correctly.

Custom Field Creation

Custom Field In Action



Date In Header



8.28 Add Custom Forms to Ticket Filter Data

Summary:

Previously, you could not add Custom Forms/Fields to Ticket Filter Rules. This version added the ability to add Custom Forms/Fields to Ticket Filter Rules so you can filter and perform actions on tickets that are created via API or Client Portal based on Custom Form/Field criteria.

Note:

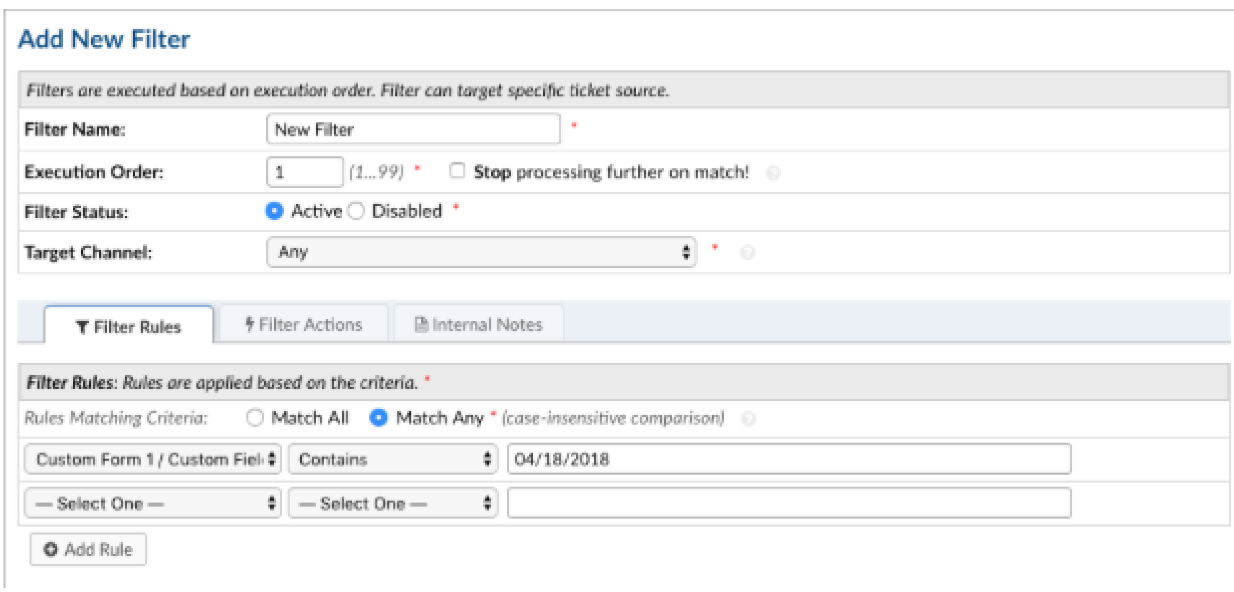
Tickets created via email do not have custom forms/fields available until after creation; Ticket Filters are ran before tickets are actually created. So this feature doesn't apply to tickets created via email.

Tests:

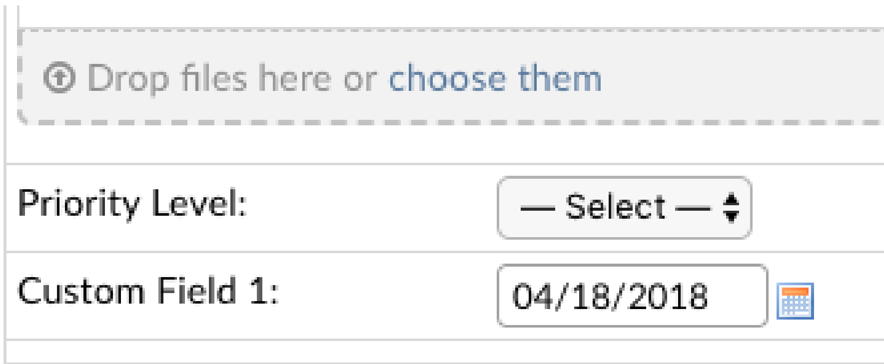
1. Login to helpdesk.

2. Go to Admin Panel > Manage > Ticket Filters.
3. Click Add New Filter.
4. Add any Filter Name you'd like.
5. Add 1 for Execution Order.
6. Make Filter Status Active.
7. Change Target Channel to Any.
8. Under Filter Rules tab, click the first dropdown.
9. Click any Custom Form Field name to add it.
10. Click the dropdown next to it to add a matching rule for the Custom Field.
11. Click Filter Actions tab.
12. Click the dropdown and add a Filter Action (such as Assign Agent/Team).
13. Once you add an Action you have to click the dropdown next to it to select the Actions value.
14. Once everything is completed, click Add Filter.
15. Double-check to make sure the Filter is Active and go to the Agent Panel to create a new Ticket.
16. On the new Ticket, fill out the Custom Form Field so it will match the Filter Rule.
17. Create the ticket and see if the Filter Action executed. (ie. set the Department, Assigned an Agent/Team, etc.)

Creating Filter



Creating Ticket To Match Filter



Ticket Action Successful

CHAPTER 9

Admin Panel

9.1 Dashboard Tab

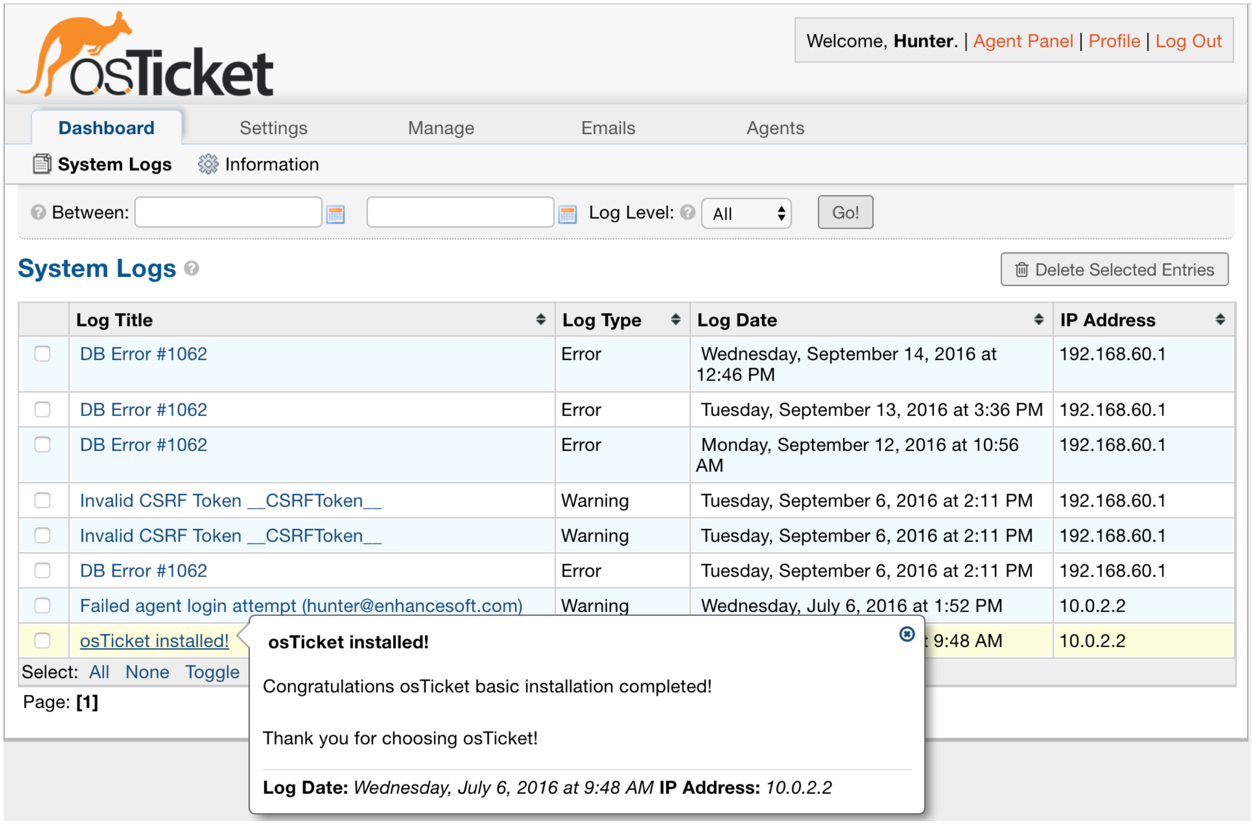
9.1.1 System Logs

Admin Panel > Dashboard > System Logs

The System Logs section of the Dashboard Tab is where you will find any troubleshooting-related logging activity (e.g., Errors, Warnings, or Bugs). As seen below, this can relate to various issues, and when the cursor is above any Log, the specific details of the Log are shown.

To delete any Log entries, simply mark the checkbox next to the Log and press the 'Delete Selected Entries' button at the top right.

Also, the Default Log Level (e.g., Error, Warn, Debug, or None) can be selected from the **Admin Panel > Settings > System** tab.

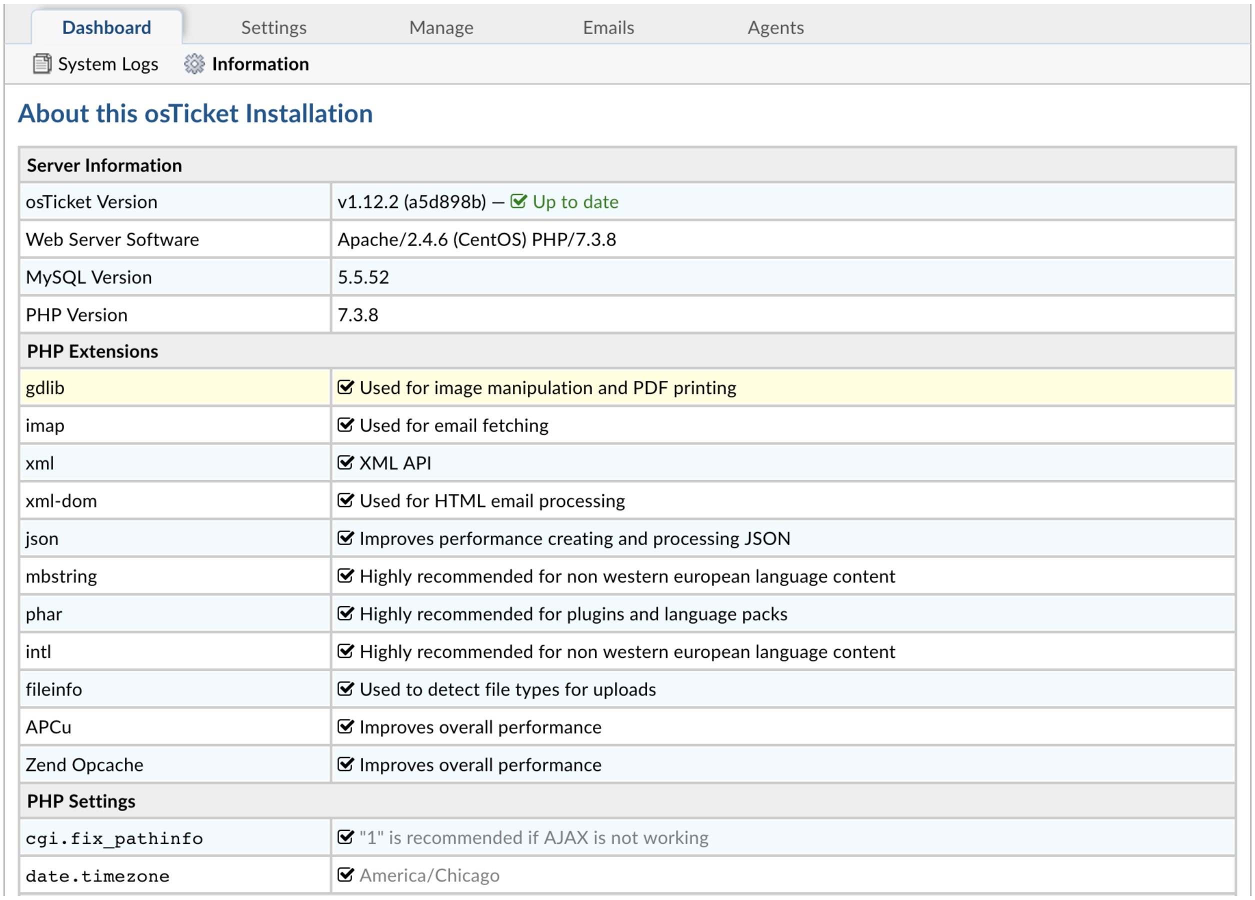


9.1.2 Information

Admin Panel > Dashboard > Information

This section of the Admin Panel describes the system that osTicket is installed on. This section displays the system's Server Information, PHP Extensions, PHP Settings (which have to do with the php.ini file), Database Information and Usage, and Installed Language Packs associated with osTicket.

Basically, this page provides all the technical information of the server and the installed packages necessary to the installation and/or quality performance of osTicket. This page is also very useful for determining how to best troubleshoot any problems or concerns by detailing the system version numbers.



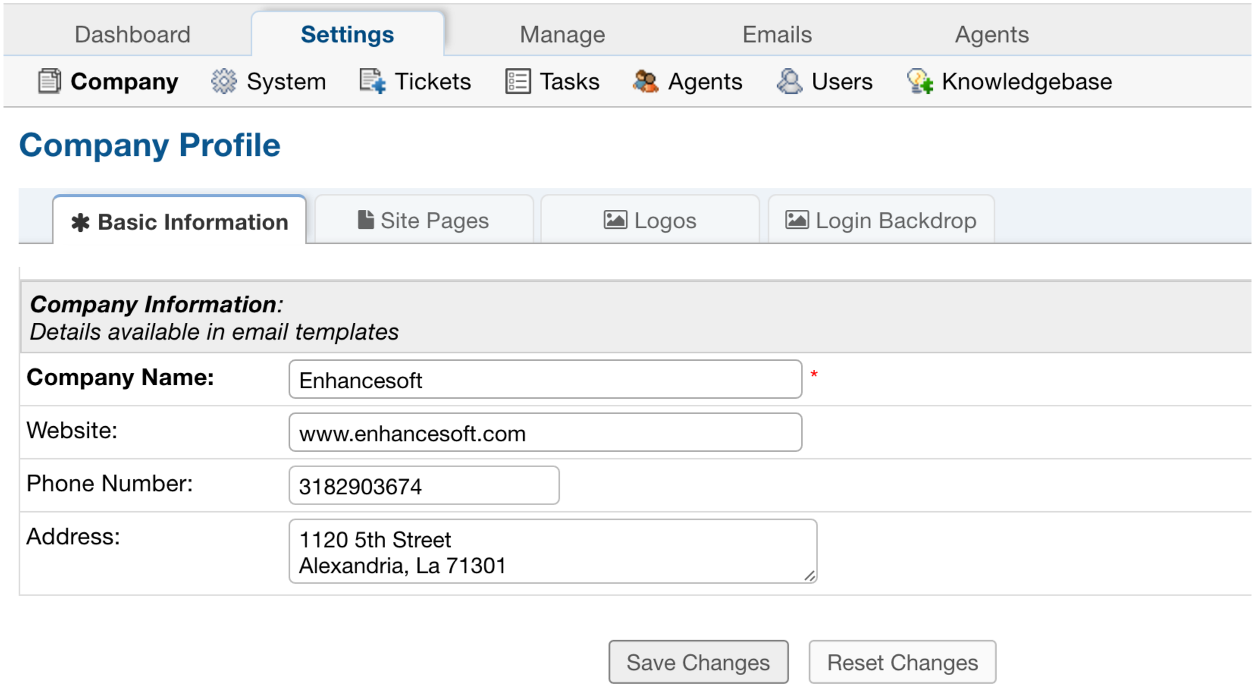
Server Information	
osTicket Version	v1.12.2 (a5d898b) — Up to date
Web Server Software	Apache/2.4.6 (CentOS) PHP/7.3.8
MySQL Version	5.5.52
PHP Version	7.3.8
PHP Extensions	
gdlib	Used for image manipulation and PDF printing
imap	Used for email fetching
xml	XML API
xml-dom	Used for HTML email processing
json	Improves performance creating and processing JSON
mbstring	Highly recommended for non western european language content
phar	Highly recommended for plugins and language packs
intl	Highly recommended for non western european language content
fileinfo	Used to detect file types for uploads
APCu	Improves overall performance
Zend Opcache	Improves overall performance
PHP Settings	
`cgi.fix_pathinfo`	"1" is recommended if AJAX is not working
`date.timezone`	America/Chicago

9.2 Settings Tab

9.2.1 Company Settings

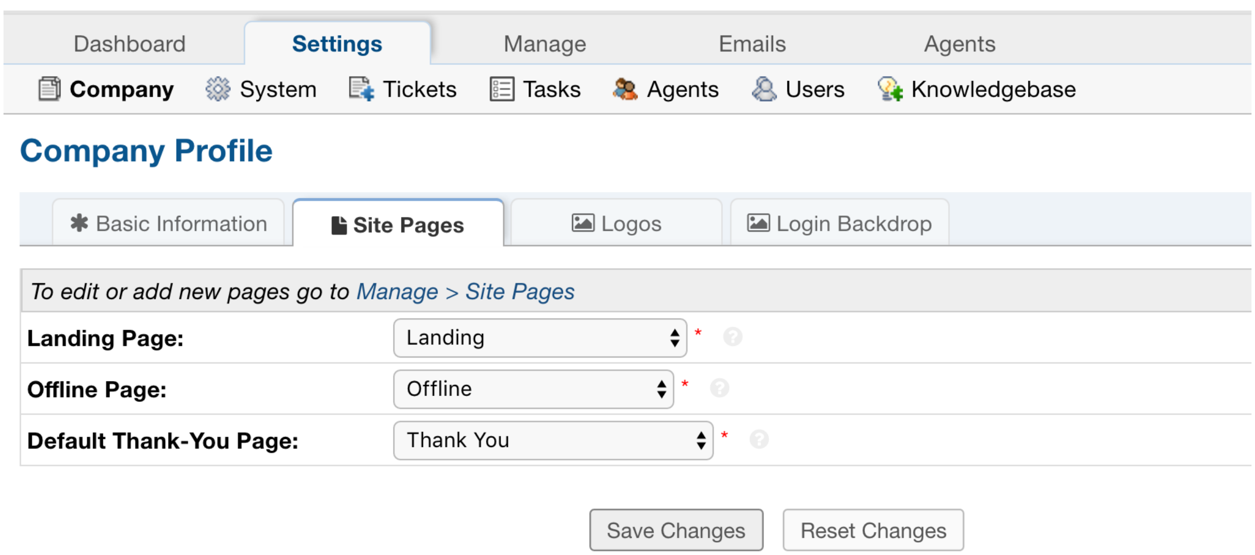
Admin Panel > Settings > Company

Basic Information



This tab contains the information that will be pulled into the email templates for the help desk company information, including Company Name, address, etc. Custom Fields can be added to the Company Information built-in form located at Admin Panel > Manage > Forms.

Site Pages



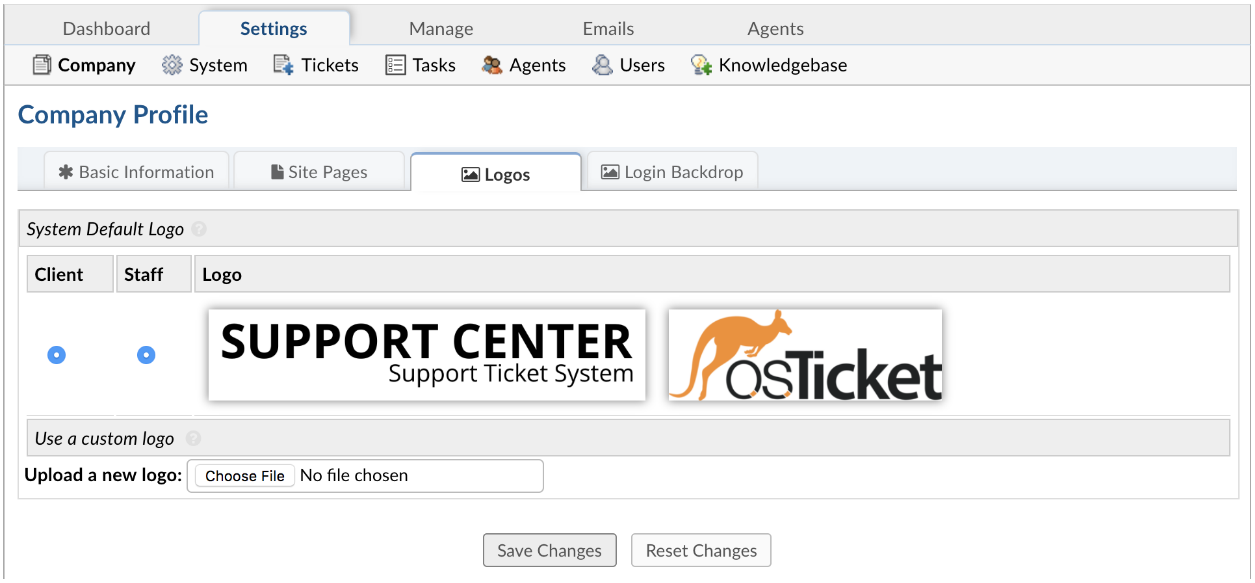
This is where you choose the layout your User will see for common pages.

Landing Page: Displayed on the front page of your website.

Offline Page: Displayed when your helpdesk is offline.

Default Thank-You Page: Displayed to the User when they submit a new ticket.

Logos



The help desk can be branded with a company logo by uploading a company logo at Admin Panel > Settings > Company.

The logo may be an image in a .gif, .jpg, or .png format. To speed up load times, it is recommended that the image be sized close to the default image size (817px x 170px). Once the logo has been selected, click on "Save Changes" at the bottom of the page to start the upload process.

After the logo is uploaded, be sure to select it to be visible on the Landing, Thank You, and Offline pages. Numerous logos can be uploaded and added to email templates; however, only one logo can be visible at a time on all Site Pages.To edit the text for these pages, simply go to Admin Panel > Manage > Site Pages and select the page to be edited.

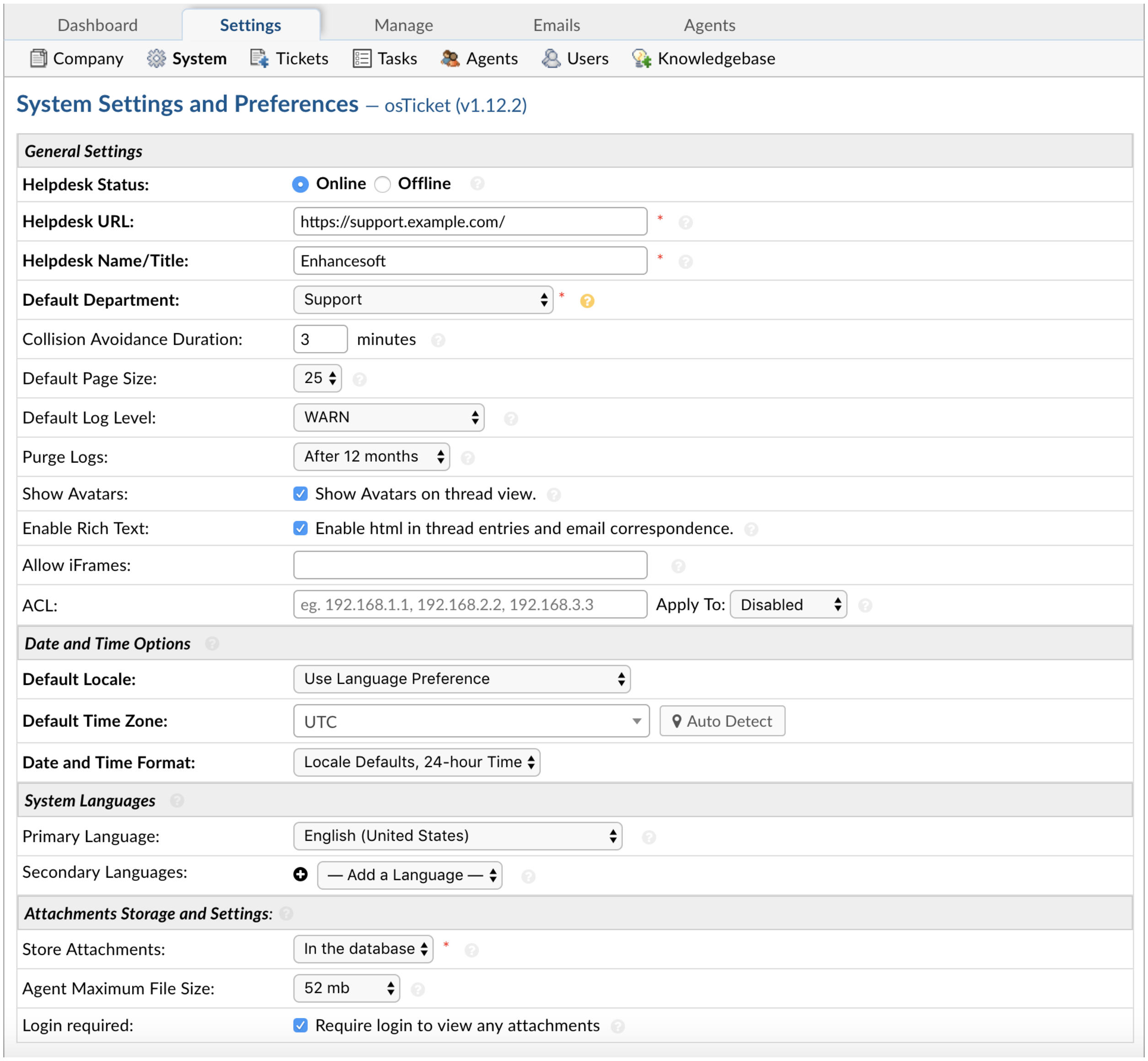
Login-Backdrop

Upload an image to customize the **Backdrop** that will be displayed on the staff login page. Choose an image in the .gif, .jpg, or .png formats. We will proportionally resize the display of your image. We will not, however, resize the image's data. Therefore, to speed up load times, it is recommended that you keep your image relatively small (under a megabyte). Note also that the PHP max upload settings apply.

9.2.2 System Settings

Admin Panel > Settings > System

General Settings



Helpdesk Status: If the status is changed to Offline, the client interface will be disabled. This does not, however, affect any normal Agent interaction with the Agent Panel.

Helpdesk URL: This URL is the base of your osTicket installation. It is used in email communication to direct Users back to your helpdesk.

Helpdesk Name/Title: This is the title that appears in the browser tab. Also, if your help desk page is bookmarked, this will be the title/name of the site page.

Default Department: Choose a default Department for tickets that are not otherwise routed to a specific department. Tickets can be routed-based on help topics, incoming emails, and ticket filter settings.

Collision Avoidance Duration: Enter the maximum length of time an Agent is allowed to hold a lock on a ticket or task without any activity. Enter 0 to disable the lockout feature.

Default Page Size: Choose the number of items shown per page in the Ticket Queues of the Agent Panel. Each Agent can also customize this number for their own account under My Preferences.

Default Log Level: Determine the minimum level of issues which will be recorded in the System Log. Debug represents the least severity, and Error represents the greatest severity. For example, if you want to see all issues in the System Logs, choose Debug.

Purge Logs: Determine how long you would like to keep System Logs before they are deleted. System logs are located at Admin Panel > Dashboard and include Error Messages, Warnings, or Debug events of the help desk.

Show Avatars: Enable this to show Avatars on thread correspondence. The Avatar Source can be set in Agents' and Users' settings pages.

Enable HTML/Rich Text: If enabled, this will permit the use of rich text formatting between Clients and Agents.

ACL: ACL (or Access Control List) is a feature allowing you to limit access to your entire helpdesk (or specific panels) to a list of IP addresses. See full documentation *here*.

Allow iFrames: This is a setting to allow specified domains to use your helpdesk in an iFrame. By default no one is allowed to use your helpdesk in an iFrame for security purposes. If however you'd like to use your helpdesk in an iFrame on your company website/forum/etc you can enter the site domain in the Allow iFrames textbox and the site will be able to use your helpdesk in an iFrame. This option accepts domain wildcards, HTTP/HTTPS URL scheme, and port numbers. For more information on these formats view the `<host-source>` options in this link. *Example:* `https://domain.tld, sub.domain.tld:443, http://*.domain.tld`

Date & Time Settings

Date & Time Options Section:

The following settings define the default settings for Date and Time settings for the help desk. You can choose to use the locale defaults for the selected locale or use customize the formats to meet your unique requirements. Refer to the ICU format strings as a reference for customization. The dates shown below simply illustrate the result of their corresponding values.

> **Default Locale:** Can be based on Language Preference or select other available options from the drop down. Please note, any included language packs will expand the local options available.
>
> **Default Time Zone:** Can be auto detected or selected from available options in the drop down.
>
> **Date & Time Format:** Can choose from Locale Default, Locale Defaults with 24-hour time or Advanced for specific time/date formatting options of the the ICU Date Formatting Table
>
> > **ADVANCED:**
> >
> > **Time Format:** Format of the time as seen throughout the help desk.
> >
> > **Date Format:** Date format preference for the Help Desk.
> >
> > **Date and Time Format:** Format of the Date and Time of the Help Desk.
> >
> > **Day, Date, and Time Format:** Where applicable, format of the Day, Date, and Time stamp of the Help Desk.

System Languages: Choose a system primary language and optionally secondary languages to make your interface feel localized for your agents and Users.

> **Primary Language:** Content of this language is displayed to agents and Users if their respective language preference is not currently available. This includes the content of the interface as well as custom content, such as thank-you pages and email messages. This is the language in which the untranslated versions of your content should be written.
>
> **Secondary Language:** Select language preference options for your agents and Users. The interface will be available in these languages, and custom content, such as thank-you pages and help topic names, will be translatable to these languages.

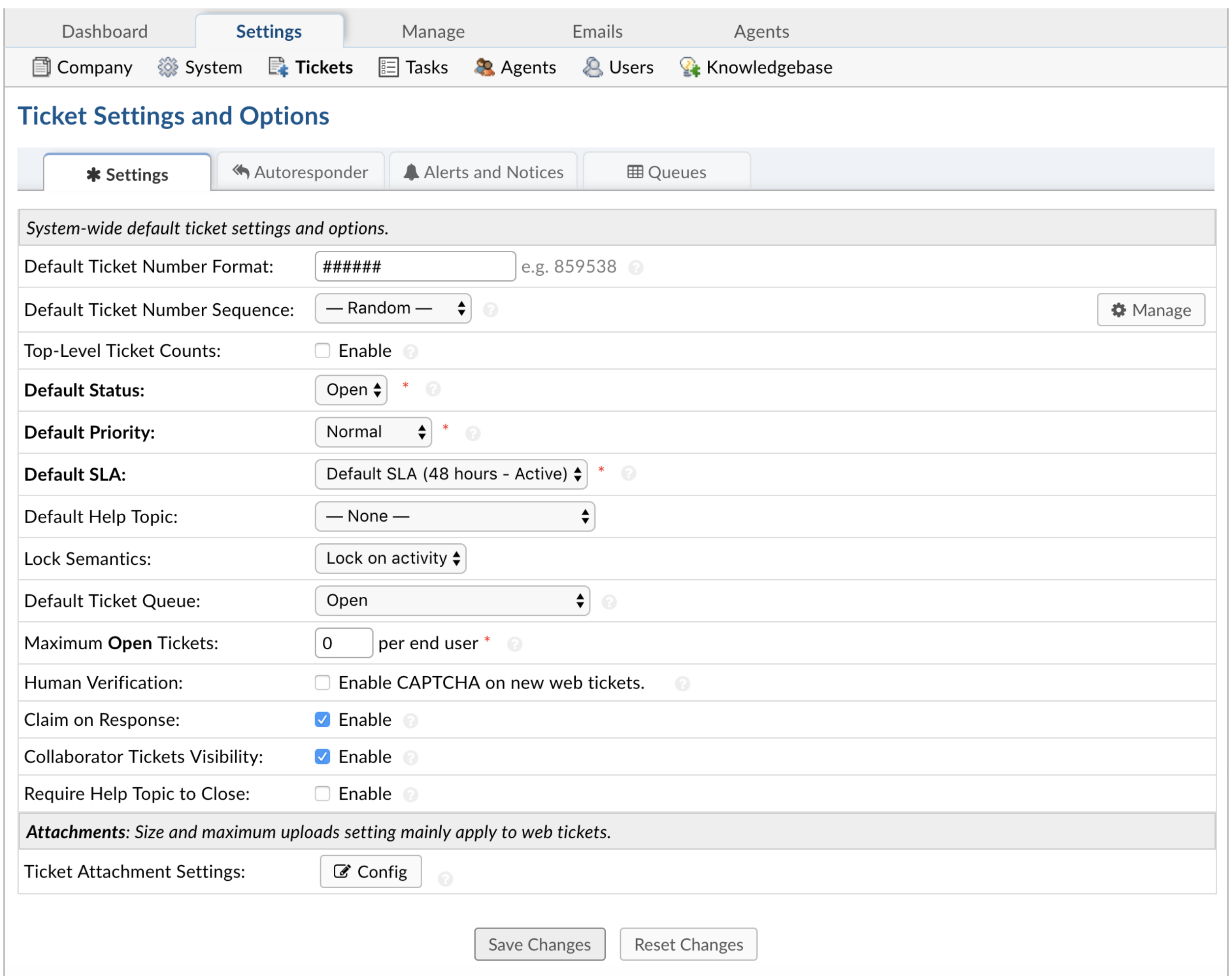
Attachment Settings and Storage: Configure how attachments are stored.

> **Store Attachments:** Choose how attachments are stored; in the database or in additional storage backends which can be added by installing storage plugins.
>
> **Agent Maximum File Size:** Choose a maximum file size for attachments uploaded by agents. This includes canned attachments, knowledge base articles, and attachments to ticket and task replies. The upper limit is controlled by PHP's upload_max_filesize setting.
>
> **Login Required:** Enable this setting to forbid serving attachments to unauthenticated users. That is, users must sign into the system (both end users and agents), in order to view attachments. From a security perspective, be aware that the user's browser may retain previously-viewed files in its cache. Furthermore, all file links on your helpdesk automatically expire after about 24 hours.

9.2.3 Tickets Settings

Admin Panel > Settings > Tickets

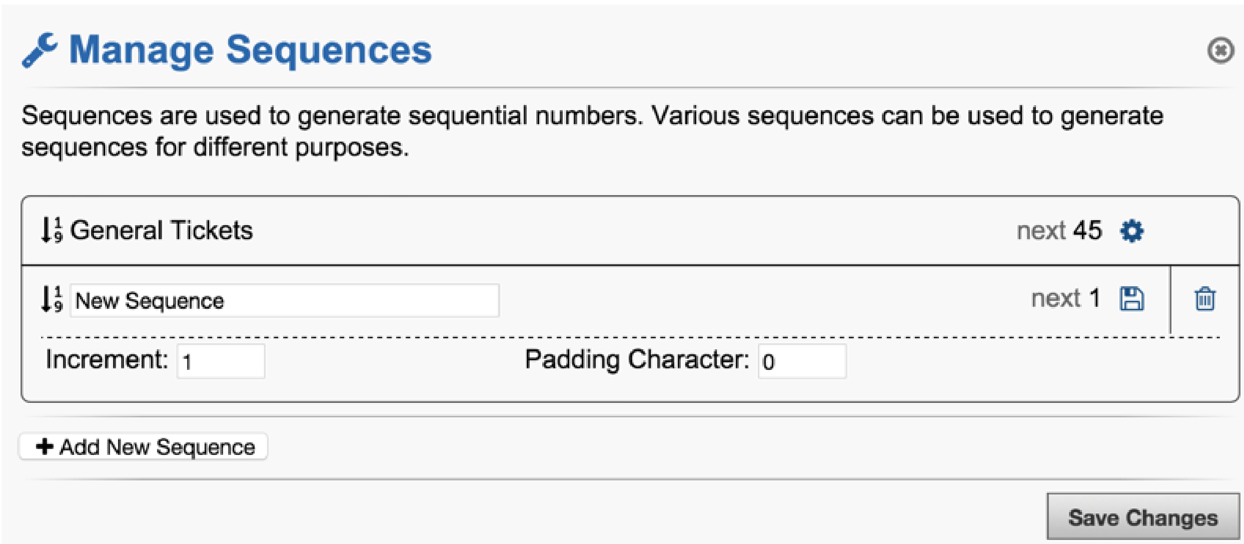
Settings



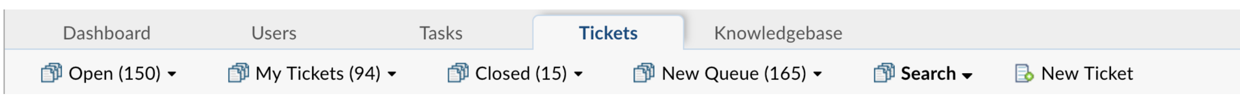
In this section, you can create standards and rules for each ticket that is created. Review each setting in this tab and determine the best settings for your organization. You can also enable attachments on this tab. All default settings can be overridden at various locations in the help desk.

Default Ticket Number Format: This setting is used to generate ticket numbers. Use hash signs (#) where digits are to be placed. Any other text in the number format will be preserved. For example, for six-digit numbers, use ######.

Default Ticket Number Sequence: Choose between Random or Sequential numbers for tickets. To create new sequences, click on the Manage button to the far right of the field.



Top-Level Queue Counts: If enabled, this will show the Ticket Counts for Top-Level Queues. By default Top-Level Queues do not show their counts. For now, counts will not appear until you hover over one of the Queue names.



Default Status: Choose a status as the default for new tickets. This can be defined for each help topic, if desired. It can also be overridden by a ticket filter.

Default Priority: Choose between Low, Normal, High, and Emergency for all tickets not auto-assigned to priority based on the Help Topic, Email Address, or Department configurations if set different than System Default.

Default SLA: Default Service Level Agreement to close ticket (in hours) To create SLA levels, go to Admin Panel > Manage > SLA Plans.

Default Help Topic: Select a Help Topic that will be automatically selected when an Agent or end-user opens a new ticket on the help desk or if a ticket is emailed in to the Help Desk.

Lock Semantics: Determine what actions taken by Agents on tickets will create a lock on the tickets. Options include: Disable, Lock on View, and Lock on Activity.

Default Ticket Queue: Setting to determine the default queue for agents upon log-in. Agents can also set their default queue in their Profile tab to override this setting.

Maximum Open Tickets: Maximum number of open tickets allowed per email/user; helps with spam and email flood control - You can enter 0 for unlimited.

Human Verification: Enable CAPTCHA on the Client Portal to verify an incoming ticket is the result of human activity. Requires GDLib library.

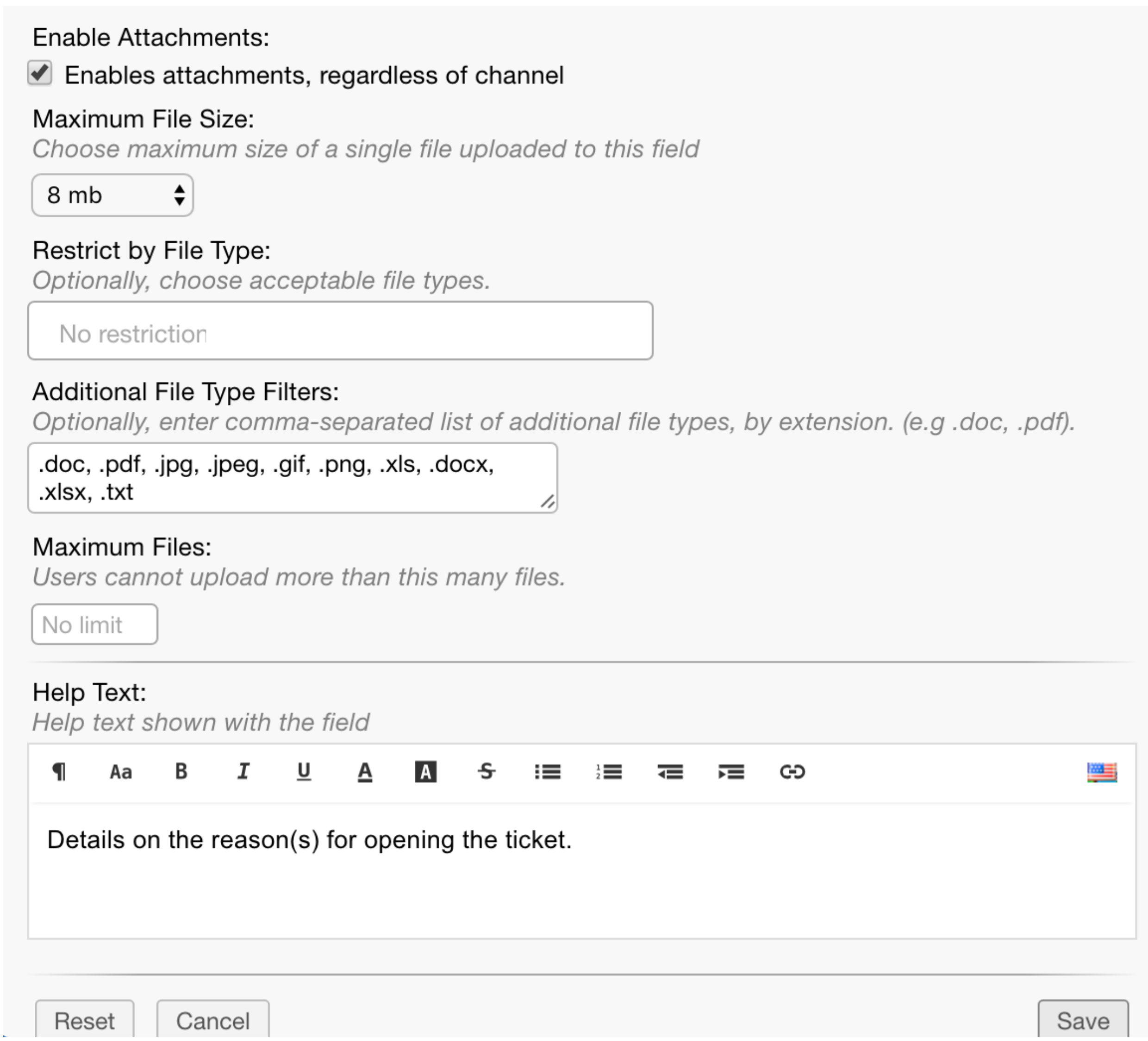
Claim on Response: Enable this to auto-assign unassigned tickets to the responding Agent. Reopened tickets are always assigned to the last respondent.

Collaborator Ticket Visibility: If Enabled, Users will have visibility to ALL Tickets they participate in when signing into the Web Portal. If Disabled, Users will only be able to see their own Tickets when signing into the Web Portal.

Require Help Topic: If Enabled, a Ticket must have a Help Topic in order to be Closed by an Agent. This setting is useful if tickets are being created via email and you would like email tickets to have a Help Topic assigned to them.

Attachments: The configurations for this field is specific to the User attachment settings when opening a ticket on the help desk. Attachments are included by default to the Issue Details field of the built-in Ticket Details Form.

With the User Attachment Settings, click the grey "Config" button to configure the settings for the attachment field included in the Ticket Details Built-in Form. This field is available for each ticket opened on the client portal and also allows attachment from any channel a ticket comes into in the help desk. If disabled, this will not allow attachments included in an email sent to the help desk to be included in the ticket. **(Attachments can still be submitted to the ticket if an Attachment field is added to the Ticket Details form or any custom form with attachments disabled globally.)**



Included in the configurations box:

> **Enabling of Attachments:** This is a global setting pertaining to new tickets created on the client portal or emailed into the help desk. If disabled, tickets will be created, but no attachments will be included if sent via email. If the ticket is created on the client portal and attachments are disabled, there will be no

attachment field within the Ticket Details unless a custom field is added to the ticket (either on the Ticket Details built in form or a custom form associated with a help topic) to accept attachments.

Maximum File Size: This is the size per attachment that is acceptable when tickets are created or responses are posted. If an attachment exceeds this limit, an internal note will be posted letting the agent know an attachment was not accepted.

Attachment File Limitations: Allows the configuration of specific types of attachments if necessary.

Maximum Attachments Allowed by the end-user: If necessary, the number of files can be limited per upload of attachments.

Help Text: Text that will appear under the field to help users and agents creating tickets get a better understanding of the information being gathered.

Autoresponder

Global setting for the Auto Responses which are sent to end users; can be disabled by departments, Help Topic, Ticket Filter, or email address. These message templates can be reviewed and edited in the Admin Panel > Emails > Templates and include:

New Ticket: Enable this to send an autoresponse to the User on new ticket creation.

New Ticket By Agent: Notice sent when an Agent creates a ticket on behalf of the User. Agent can override this when creating new tickets.

New Message:

> **Submitter:** Confirmation notice sent when a new message is appended to an existing ticket.
>
> **Participant:** Broadcast messages received from message submitter to all other participants on the ticket.

Overlimit Notice: Ticket denied notice sent to User on Maximum Open Tickets violation.

Alerts & Notices

There are messages which can be enabled to alert agents of the events in a Ticket's lifecycle. These messages templates can be edited in the Admin Panel > Emails > Templates and include:

New Ticket Alert: Alert sent out to Agents when a new ticket is created.

New Message Alert: Alert sent out to Agents when a new message from the User is appended to an existing ticket.

New Internal Activity Alert: Alert sent out to Agents when internal activity such as an internal note or an agent reply is appended to a ticket.

Ticket Assignment Alert: Alert sent out to Agents on ticket assignment.

Ticket Transfer Alert: Alert sent out to Agents on ticket transfer between Departments.

Overdue Ticket Alert: Alert sent out to Agents when a ticket becomes overdue based on SLA or Due Date.

System Alerts: Significant system events that are sent out to the Administrator. Depending on the configured Log Level, the events are also made available in the System Logs

9.2.4 Task Settings

Admin Panel > Settings > Tasks

Settings

Default Task Number Format: This setting is used to generate task numbers. Use hash signs (#) where digits are to be placed. Any other text in the number format will be preserved. For example, for six-digit numbers, use ######.

Default Task Number Sequence: Choose a sequence from which to derive new task numbers. The system has an incrementing sequence and a random sequence by default. To create a new sequence, click on the Manage tab to the far right of the field.

Default Priority: Choose a default Priority for tasks not assigned a priority automatically.

Attachments: Configure settings for files attached to the **Description** field. These settings are used for all new tasks and new messages regardless of the source channel (web portal, email, api, etc.).

Alerts & Notices

There are messages which can be enabled to alert agents of the events in a Task's lifecycle. These messages templates can be edited in the Admin Panel > Emails > Templates and include:

New Task Alert: Alert sent out to Agents when a new task is created.

New Activity Alert: Alert sent out to Agents when a new message is appended to an existing task.

Task Assignment Alert: Alert sent out to Agents on task assignment.

Task Transfer Alert: Alert sent out to Agents on task transfer between Departments.

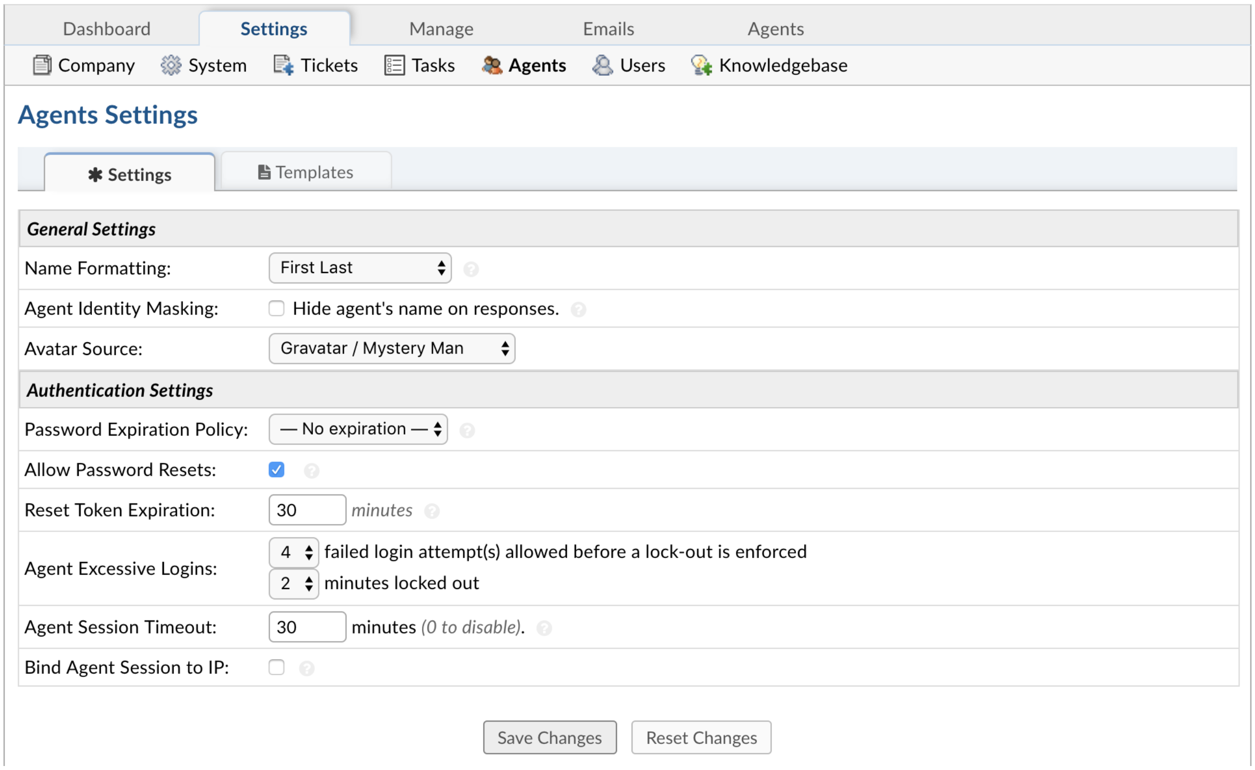
Overdue Task Alert: Alert sent out to Agents when a task becomes overdue based on SLA or Due Date.

9.2.5 Agents Settings

Admin Panel > Settings > Agents

Settings

Set system configurations for the Agents of the help desk including the Password Expiration Policy, the max number of failed login attempts before prompting the "forget password" link, or if they need to be locked out. Agents can also be bound to their IP address for log-in.



Name Formatting: Format for Agents names throughout the system.

Agent Identity Masking: If enabled, this will hide the Agent's name from the Client during any communication.

Avatar Source: Choice of where you want your Avatars to come from.

Password Expiration Policy: Choose how often Agents will be required to change their password. If disabled, passwords will not expire.

Allow Password Resets: If enabled, displays the Forgot My Password link on the Staff Log-In Page after a failed log in attempt.

Reset Token Expiration: Choose the duration (in minutes) for which the Password Reset Tokens will be valid. When an Agent requests a Password Reset, they are emailed a token that will permit the reset to take place.

Agent Excessive Logins: Choose how many failed login attempt(s) allowed before a lock-out is enforced as well as how long the lock will be.

Agent Session Timeout: Choose the maximum idle time (in minutes) before an Agent is required to log in again.

Bind Agent Session to IP: Enable this if you want Agent to be remembered by their current IP upon Log In.

Templates

Agent Welcome Email: Initial (optional) email sent to staff members when accounts are created for them in the staff control panel

Sign-in Login Banner: This is the initial message and banner shown on the staff login page.

Password Reset Email: Template of the email sent to staff members when using the Forgot My Password link.

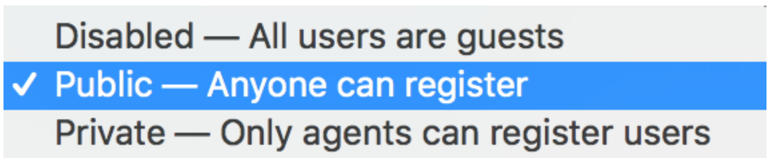
9.2.6 User Settings

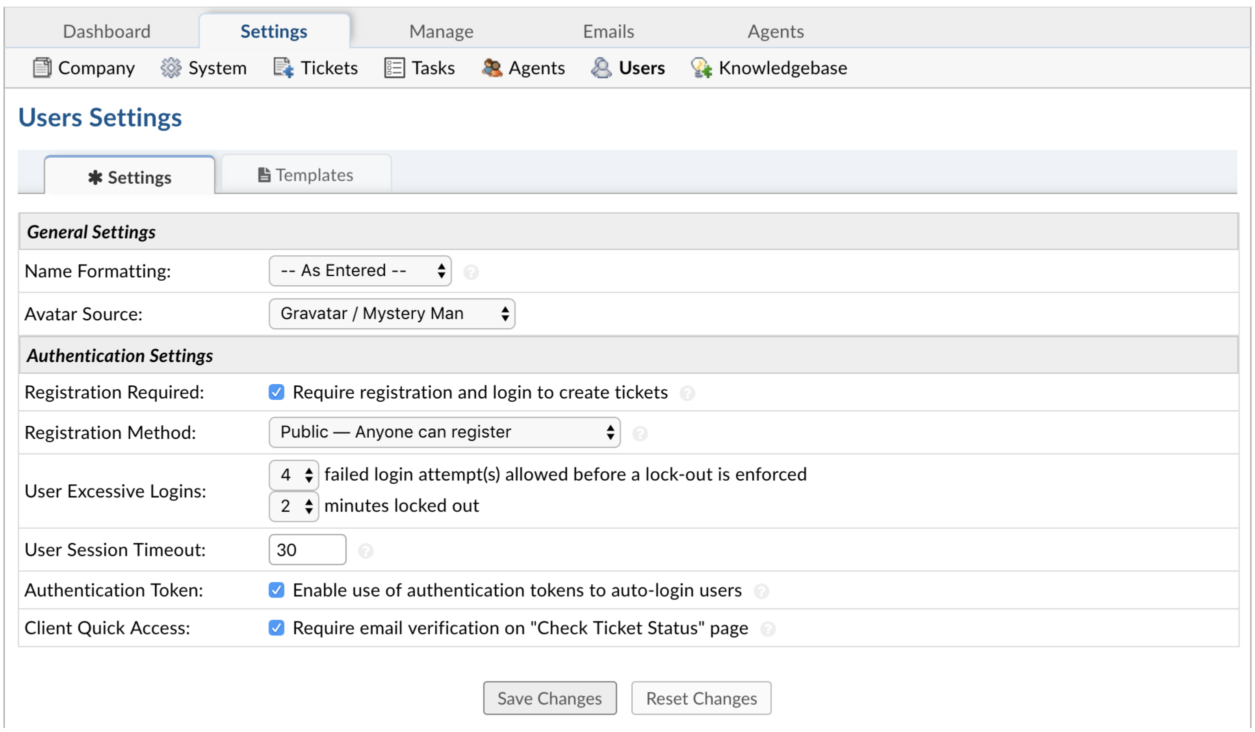
Admin Panel > Settings > Users

Settings

Registration can be required for Users to create tickets on the Help Desk to prevent random tickets or to limit Users' accessibility to the help desk.

If Registration is required, there are a few options of registration methods for end-users.





Registration is an important feature for Users to check ticket statuses or see all of their tickets in the help desk. A User can follow the link in the auto response to check the status of a ticket, or they can Login to the client portal to a ticket with the ticket number and their email address. This will then send a link to their email for them to follow back to that one, singular ticket. A User must be registered to Login to view all tickets associated with their name.

Users can easily check the status of a ticket with their email address and a ticket number if the Click Quick Access box is unchecked.

Templates

All Email Templates for Authentication and Access are editable and located in the Access sub-tab. Also located in this sub-tab is where the Sign-In Pages for both agents and Users can be edited. All templates contain an HTML/Rich Text toolbar when text is highlighted.

Guest Ticket Access: Ticket access link sent to clients for guest-only systems where the ticket number and email address will trigger an access link sent via email .

Sign-In Page: This forms the header on the staff login page.

Password Reset Email: Template of the email sent to clients when using the Forgot My Password link on the login page.

Please Confirm Email Address Page: Template of the page shown to the user after registering for an account.

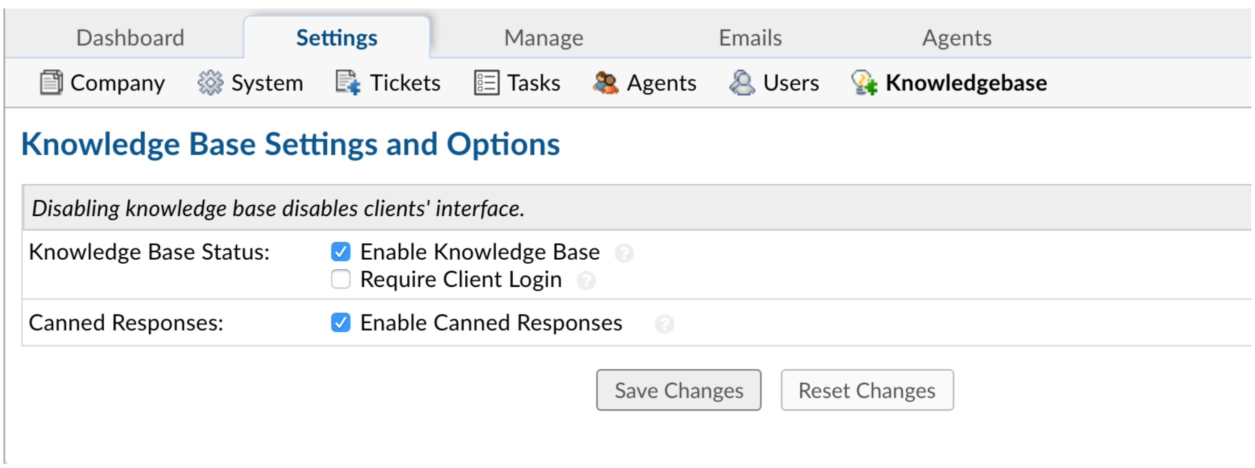
Account Confirmation Email: Confirmation email sent to clients when accounts are created for them by staff or via the client portal.

Account Confirmed Page: Page shown to the user after successfully registering and confirming their account.

9.2.7 Knowledgebase Settings

Admin Panel > Settings > Knowledgebase

Options & Settings



Knowledgebase Status:

> **Enable Knowledge Base:** Allows your Users self-service access to your public knowledgebase articles.
>
> **Require Client Login:** Requires all Users to log in before they can view knowledgebase articles.

Canned Responses: Enable this setting to allow Agents to use Canned Responses when replying to tickets.

9.3 Manage Tab

9.3.1 Help Topics

Admin Panel > Manage > Help Topics:

Create and Assign Help Topics

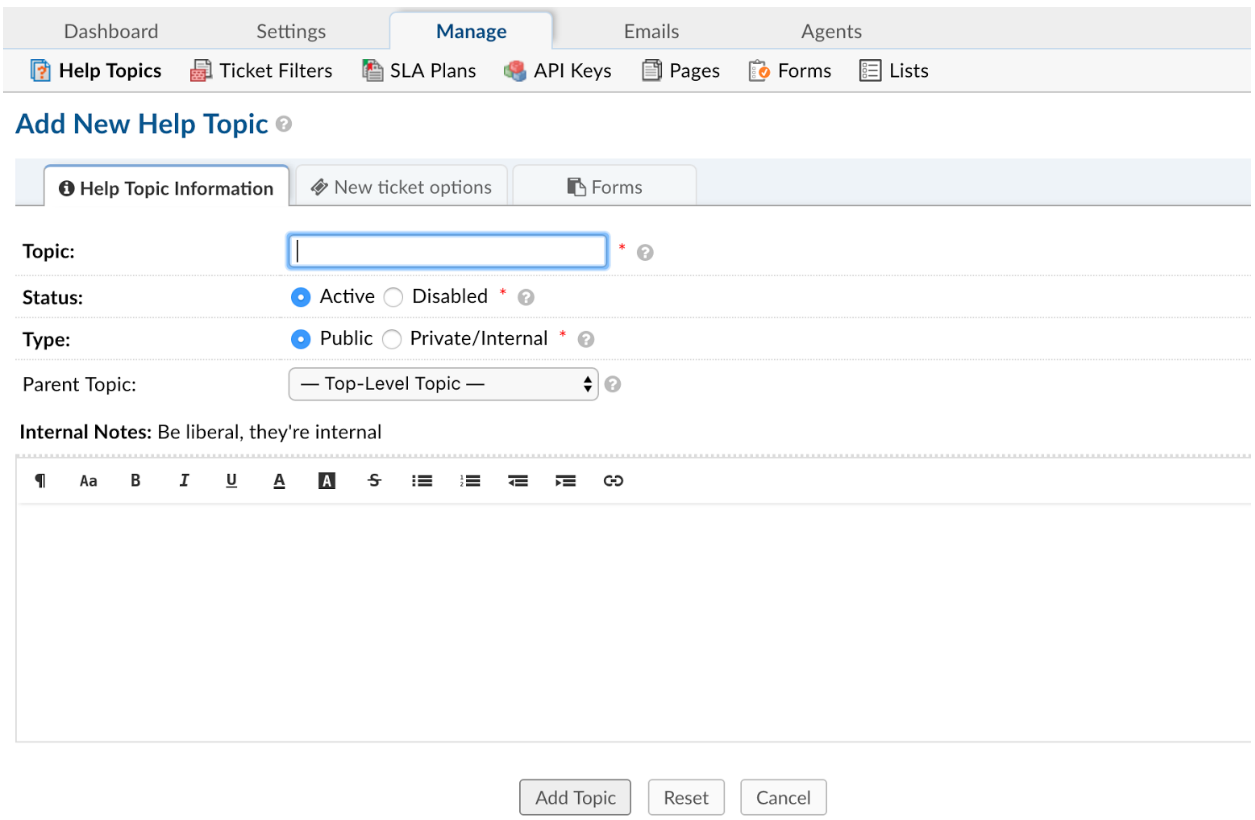
Help Topics will help streamline your end-user's help desk experience to ensure proper assignment and prompt response to the ticket. Create as many Help Topics as needed and can even nest Help Topics within each other for further breakdown (For example, Human Resources and Human Resources/Payroll.)

Help Topics will determine what Department the ticket is routed to which will determine which Agents have access to the ticket. The Help Topic also can determine other configurations of the ticket, such as the ticket's SLA (or Service Level Agreement) and priority of a ticket, i.e. Emergency to Low.

There are two places where the Help Topic must be selected on New Tickets; the client portal and new tickets created internally by staff. When Users select the Help Topic, they are not aware of the configurations in place for that Help Topic.

Admin Panel > Manage > Help Topics > Add New Help Topic or click on existing topic to edit the following:

Help Topic Information Tab:



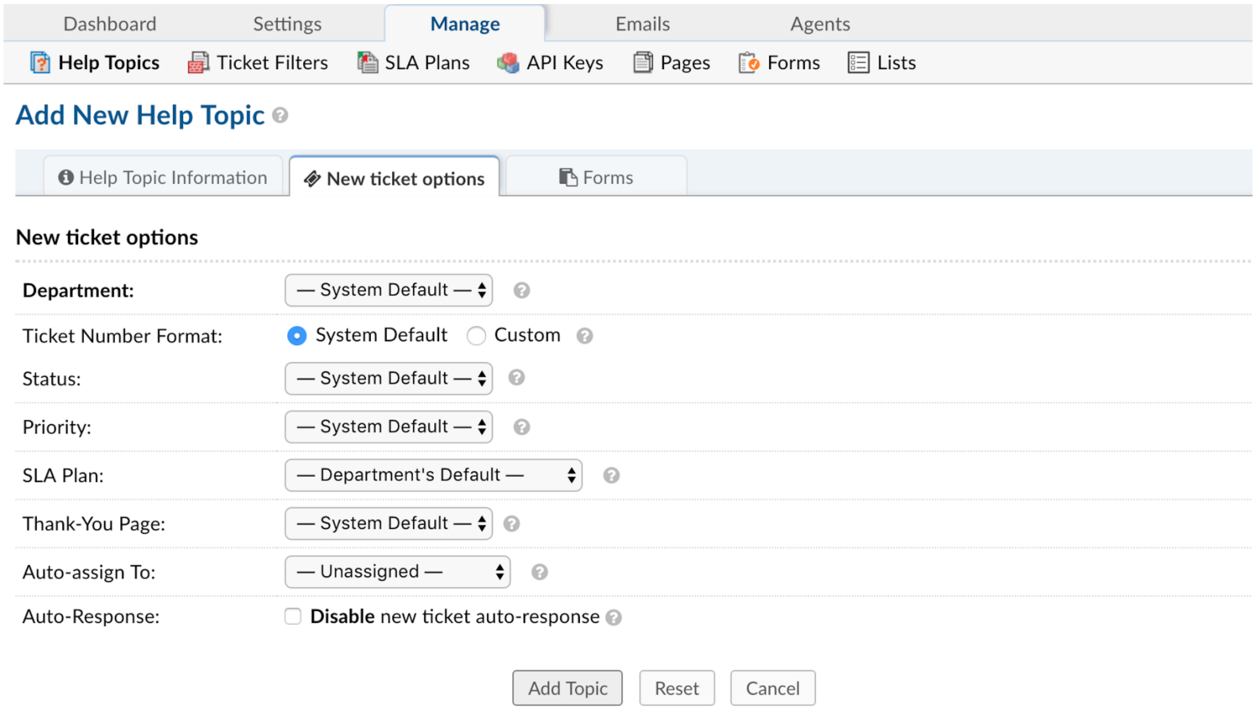
Topic: This is the name of the Help Topic as it will appear to the end-user.

Status: Must be set to "Active" to be utilized; if disabled, the topic will not appear in the drop down.

Type: If topic is selected as "Private," it will only be visible when a ticket is created internally by an Agent from the Staff Control Panel (Agent Panel > Tickets > New Ticket).

Parent Topic: Topics can be nested together to further streamline the client's selection of topics. The Parent Topic will show up first in the drop down followed by the topic name. Even though it is nested, the child topic's settings will override the Parent Topic's settings.

New Ticket Options Tab:



Department: Tickets with this help topic will be assigned to specified department. Department defaults will be associated with this ticket unless otherwise specified. You can choose the templates that will be used for autoresponse and staff alerts (which will have the department signature if the signature variable is included.)

Ticket Number Format: Custom ticket number formats can be created and associated to tickets opened under this help topic.

Status: Tickets can assigned to a status automatically.

Ticket Priority: This will determine the tickets sort order in the Open Tickets queue of the Agent Panel. By default, tickets will sort in descending order.

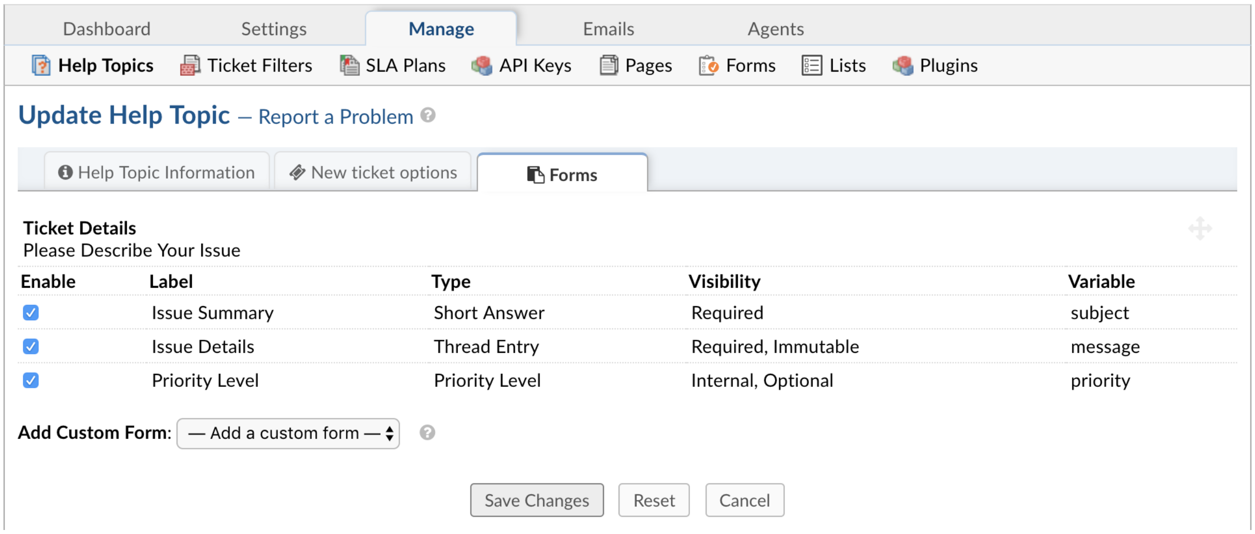
SLA Plan: If the specific help topic requires a different SLA Plan than the assigned department, you can assign an SLA Plan to override the department SLA auto-assigned to the department. SLA's can be created at Admin Panel > Manage > SLA Plans.

Thank You Page: Once the client creates a ticket, you can create/edit the Thank You Page they are directed to. Pages can be created and/or edited at Admin Panel > Manage > Site Pages.

Auto-Assign: Tickets can be Auto-Assigned to an agent or a team when this help topic is chosen.

Ticket Auto-Response: When disabled, no auto-response will be sent to client if this help topic is chosen. If ticket is created internally, no response will be sent UNLESS the agent creating the ticket selects for an Auto Response to be sent to the email address of the ticket.

Forms Tab:



Custom Form: Extra information for tickets associated with this help topic. Custom Forms can be created at Admin Panel > Manage > Forms. The fields of the form will appear once the Help Topic is selected.

Fields can be individually disabled by help topic. These fields would not appear on the new ticket form if disabled.

9.3.2 Ticket Filters

Admin Panel > Manage > Ticket Filters

How to Create Ticket Filters

Ticket Filters are a set of "If _____, Then_____" rules that create auto actions for new tickets based on the criteria set forth in the filter. The rules of the filter are applied only to tickets upon creation specific to how the ticket is created.

You can create Ticket Filters associated with information pulled from the email or ticket, such as a name, email address, organization, etc., and can create an auto-response (if desired) connected with a related Canned Response.

Admin Panel > Manage >Ticket Filters > Add New Filter:

Update/Add New Filter Section

Filter Name: Name given to filter for internal use only

Execution Order: This is a numeric listing of the order you want the tickets to be filtered. You can choose to stop filtering if the criteria for the filter is met- this is best utilized in determining rejected ticket filters.

Filter Status: Active or Disabled

Target: This is the source of creation of the ticket or the means by which the ticket was created. This will further specify which tickets the filter will be applied. There are 5 Targets to choose from only one can be chosen.

ANY: Applies filter to any tickets that originated from Web forms, API calls, and emails.

Web Forms: Applies filter to any tickets that originated from the Client Portal.

API Calls: If enabled, any tickets created through the API Feature will be processed for the filter if the filter criteria is met.

Emails: Tickets created from any/all emails sent to the system to create tickets.

Specific Email: A specific email address in the help desk utilized to create new tickets in the system.

Filter Rules Section

Up to 25 rules can be added in the Filter Rules section. If adding more than 4 rules to a filter, configure the actions for the entire filter after adding the first four rules and click "save changes" to view more rule boxes.

The rules criteria selection is from any field available in the ticket including custom forms, fields, lists and list properties.

Matching Methods:

Match Any versus Match All: If you would like the filter to match ANY of the rules, and then stop-choose Match Any. If you would like all rules of the filter to be matched- choose Match All.

Filter Action Section

Reject Ticket: If this is selected, no ticket will be created, therefore, save changes because all other actions below this action are invalid.

Use Reply-To Email: Reply to the specified Reply-To email address in the header of the ticket.

Ticket Auto-Response: Disable auto-responses to client if the filter rules are met.

Attach Canned Response: Send a canned response to the client if the filter rules are met.

Set Department: Auto-Assign to a specific Department if filter rules are met.

Set Status: This will determine the ticket status once created if the filter rules are met.

Set Priority: Assign priority to ticket when rules are met; this will override assigned department priority

Set SLA Plans: Assign SLA plan when rules are met; this will override assigned department SLA

Auto-Assign To: Auto-assign to specific Staff or Team when rules are matched.

Set Help Topic: Ticket can be assigned a specific help topic, which, if applicable, will also add any custom form associated with that Help Topic.

Send Email: Send an email to the client if the filter rules are met.

9.3.3 SLA Plans

Admin Panel > Manage > SLA (Service Level Agreements)

Create A New SLA Plan

SLA Plans or Service Level Agreements, are unlimited in osTicket. The purpose of the SLA Plan is to provide a length of time in which the help desk Administrator expects tickets to be closed.

SLA Plans can be created by going to the Admin Panel > Manage > SLA Plans. Click on the top right of the table to "Add New SLA Plan."

One configuration to note with each SLA Plan is whether it can be overridden on Department transfer or change of Help Topic by being Transient. Transient SLAs are considered temporary and can be overridden by a non-transient SLA on Department transfer or when its **Help Topic** is changed.

Once created, SLA Plans can be determined for Departments, Ticket Filters, and Help Topics. There is also a System Default SLA Plan which can be chosen by going to Admin Panel > Settings > Tickets.

When a ticket is created internally from the Staff Panel, agents can choose an SLA Plan which will override any other assignments to a Department or Help Topic. Agents can also select a Due Date for the ticket which, if passed, will cause the ticket to become overdue. No SLA plan can override a due date.

If a ticket is created from the Client Interface, the SLA Plan associated with the Help Topic will be in effect unless a Ticket Filter is in place and the criteria is met; then the SLA Plan associated with the Ticket Filter will be in effect.

For tickets created via email, the department that the email address is assigned to will determine the SLA plan of the ticket unless a Ticket Filter is in place and the criteria is met; then the SLA Plan associated with the Ticket Filter will be in effect.

Admin Panel > Manage > SLA Plans:

Service Level Agreements: SLA Plans can be set by help topic and department to ensure the ticket is CLOSED in the allotted or specified amount of time.

> **Name:** Plan name to be selected when assigning.
>
> **Grace Period:** Amount, in hours, before tickets with this SLA will become overdue if not closed in allotted time.
>
> **Status:** Choose Active or Disable for the plan.
>
> **Transient:** SLA can be overridden on ticket transfer or help topic change; if not transient, the SLA will remain the same as it is assigned on ticket creation.
>
> **Ticket Overdue Alerts:** This will DISABLE overdue alert notices to staff for tickets assigned this SLA.

9.3.4 API Keys

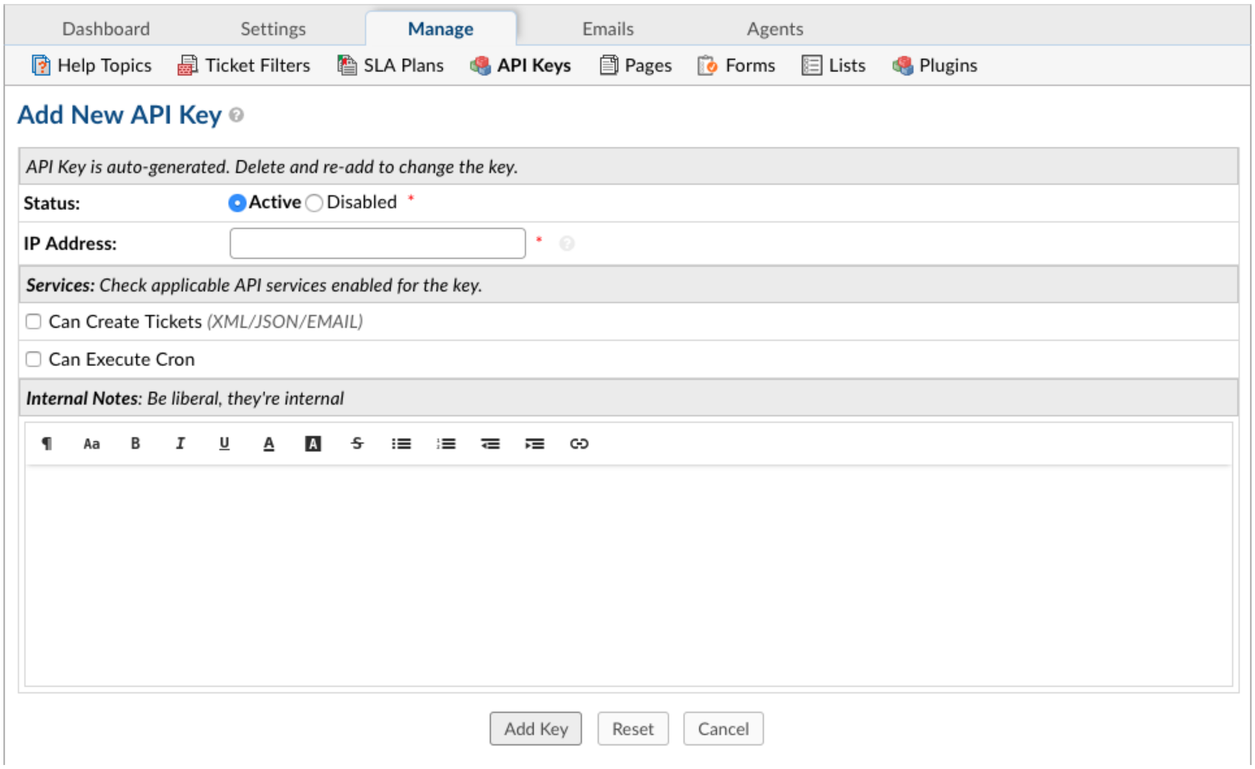
Admin Panel > Manage > API Keys

Adding/Enabling/Disabling/Deleting an API Key

The osTicket API built into osTicket allows you to write your own html forms and push the data into osTicket to open tickets.

In this section, API keys can be added with the 'Add New API Key' button, and they can be enabled/disabled/deleted by clicking on the checkbox next to the key, then clicking on the top right drop-down menu.

The following image is the information page where an API Key can be entered and Added. At this page, the API Key can be set to Active or Disabled, the IP address of the server that hosts the software. Then, Ticket Creation and Cron services can be enabled for the key. Finally, an internal note can be inserted to note the reason for this key.



9.3.5 Pages

Admin Panel > Manage > Pages

How to Edit Site Pages

Your Site Pages are what End-Users will view at various points when they are on the Client Portal.

These pages include:

Landing Offline Thank You

The **Landing** page is the first view an End-User will see when they access the Client Portal. It is where the end-users are welcomed, allowed to create a ticket, and can check the status of tickets.

The **Offline** pages appears to end-users when the help desk is disabled.

The **Thank You** page appears once the end-user has created and submitted a ticket but is not logged into the client portal of the help desk.

To edit these Site Pages, locate the Manage tab in the Admin Panel and select Pages. Then, click on the title of the page to be edited. Edit the page as desired- this can include logos, pictures, screenshots, YouTube videos, etc., to customize the page to meet specific needs.

Once done editing the page, click Save Changes at the bottom to save edits.

9.3.6 Forms

Admin Panel > Manage > Forms

Creating and Using Forms

A great way to customize the help desk to suit your unique use case is to add custom fields to either a built-in form for each ticket created from the Client Portal or internal tickets opened by agents. Included in the Help Desk are Built-In Forms and the ability to create Custom Forms.

Custom Forms

Custom Forms allow you to create a variety of answer fields which are all customizable. Fields can be listed as internal- to be utilized by staff for internal ticket creation or when editing an existing ticket; or required for when the user submits a ticket. These Custom Forms can then be added to Help Topics to help improve workflow by capturing any required information from the user when submitting a ticket.

To assign a Custom Form to a **Help Topic**, go to Admin Panel > Manage > Help Topics > and select desired help topic. In the Forms Tab of the selected Help Topic, choose custom form from the drop down to be added when clients or staff are creating a new ticket. Multiple Custom Forms can be added to each Help Topic but only one of each Custom Form.

Custom Forms can also be amended to a ticket, a user profile or an Organization by utilizing the "More" quick button on the top right corner.

Built-In Forms

These forms are included on each new ticket that is created by client or staff; regardless of Help Topic selected. Currently, the software ships with Contact Information, Ticket Details, Task Details, Organization Information, and Company Information as Built-in Forms which are included on each new ticket created. We suggest you preview these built-in forms to see the information contained in them. All can be edited to further work with your company's workflow. Fields which are marked "Required" will show in bold on the ticket form.

> **Contact Information:** This is the information associated with users in your help desk. This information will not be visible along the ticket header- only with the user's profile if you click on their name on the ticket header. You can also view and edit this information in the User Directory.
>
> **Company Information:** This is referring to your Help Desk company information and can be pulled into email templates, signatures, or canned responses utilizing the variables.
>
> **Organizational Information:** You can expand the information you include when creating Organizations in your User Directory. This information will only be visible internally by your Help Desk Agents when they are reviewing the information associated with the Organizations.
>
> **Ticket Details:** The information in these fields are collected on each ticket created when Users go to your Client Portal and click "Open a New Ticket" or when tickets are created internally by Agents. These fields can be deemed required and/or internal.
>
> **Task Details:** The information in these fields are collected on each ticket created when Users go to your Client Portal and click "Open a New Ticket" or when tickets are created internally by Agents. These fields can be deemed required and/or internal.

Field Types and their possible configurations include:

Short Answer: You can limit the number of characters (including spaces) someone can enter into the field.

> **Config box:**
>
> **Field Setup- Size:** Width, in characters, that the field box will appear for data entry.
>
> > **Max Length:** The maximum amount of characters someone can type in the field (up to 64,000).

Validator: Select from the list of available validators for the information requested in the short answer including:

IP Address

Phone

Email Address

Number

Custom (regular expression)

Regular Expression

Validator Error: Error message the end-user will see if the information in the field does not match the validator.

PlaceHolder: Text that will appear in the box until the user clicks in the box to input text.

Help Text: Text that will appear under the field to help users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Long Answer: Allows users to include a large amount of text in a form. You can configure to limit as necessary.

Config box:

Field Setup- Width (chars): Width, in characters the text box will be sized.

Height (rows): Number of rows the text box will appear in height.

Max Length: Maximum number of characters allowed to be typed in the box.

Allow HTML: Enable the HTML/Rich Text toolbar for the end-users.

Placeholder: Text that will appear in the box until the end-user clicks on the box to type text.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Date & Time: Allows end-users to select a date from the calendar as well as time. Time is formated in Military Time.

Config box:

Field Setup- Time: Show time selection with date picker.

Time Zone Awareness: Show date/time relative to user's timezone.

Earliest: Choose the earliest date the end-user can select.

Latest: Choose the latest date an end-user can select.

Allow Future Dates: Check to allow the end-user to choose a date in the future

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Phone Number: To enter a phone number from end-user; can be between 7-16 digits.

Config box:

Field Setup- Extension: Check the box for the end-user to be able to input an extension into a separate field than the phone number.

Minimum Length: Fewest digits allowed for a valid phone number.

Display Format: Currently, only format available is US.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Check Box: Can be utilized in questions requiring only one answer.

Config box:

Field Setup- Description: Text to be shown inline with checkbox widget.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Choices: Allows you to enter items that are chosen by end-user in a dropdown box

Config box:

Choices: Enter the list choices (one per line) for end-users to select from. To protect against spelling changes, "specify key:value names" to preserve entries if the list item names change. For example, in the list below, the key is the number before the value name: 1: Apple 2: Orange 3: Banana

Default: Enter the key value for the item in the choices that the system will default to when the ticket is being created. end-users can select a different value from the list if that is not the choice for them.

Prompt: Leading text shown on the drop down field for the end-user if there is no default choice entered in the configurations.

Multi-select: Enable end-users to choose more than one choice from the drop down box

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Section Break: This feature allows distinction of form sections by adding a break with a title. The field label will show up in a grey box that has extended the width of the form.

Config box:

Field Setup- Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled which will remove it from the form for new entries, but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Information: This field does not require input from the end-user nor the agent when creating a ticket. It is simply a way to communicate some sort of information.

Config box:

Field Setup- Content: Type your message here in a lighter, italicized font.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

File Upload: Allows End-Users to include attachments in association with custom fields other than the Issue Details field located in the Ticket Details form. Please note; attachments can be required for ticket creation if this field is marked as required.

Config box:

Field Setup- Max File Size: Choose maximum size of a single file uploaded to this field.

Restrict by File Type: Optionally, choose acceptable file types.

Additional File Type Filters: Optionally, enter comma-separated list of additional file types, by extension. (e.g .doc, .pdf)

Max Files: Enter the maximum number of files users can upload per response.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Built-In: Priority Level: (Low, Normal, High, Emergency) If selecting this as a required field, it will override the priority level of the Help Topic & Department.

Department: This field will populate the public Departments of the Help Desk

Assignee: This field will populate a list of all Agents of the Help Desk.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Custom Lists: You must first CREATE a custom List in Admin > Manage > Lists before it will show up in the "Type" of field.

Config box:

Field Setup- Multi-select: Enable end-users to choose more than one choice from the drop down box

Widget: Select the type of List you would like the field to be: Typeahead, Dropdown, or Text Entry.

Prompt: Leading text shown on the drop down field for the end-user if there is no default choice entered in the configurations.

Default: Select the default value for the field from the list items in the drop down; the system will default to this choice when the ticket is being created. end-users can select a different value from the list if that is not the choice for them.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

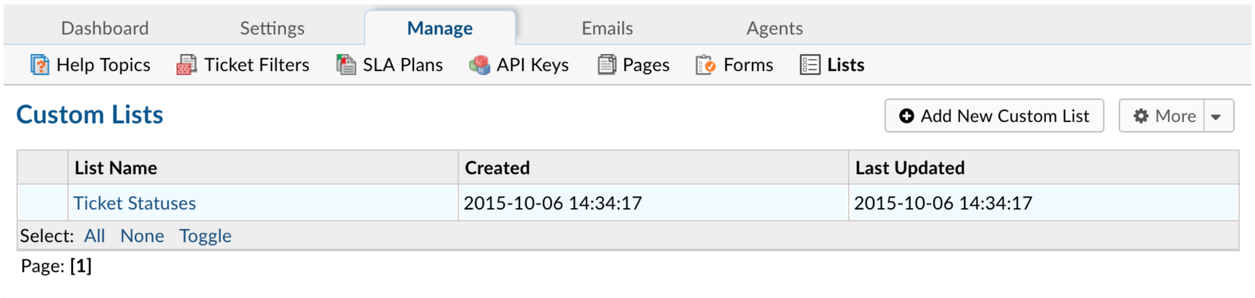
Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

9.3.7 Lists

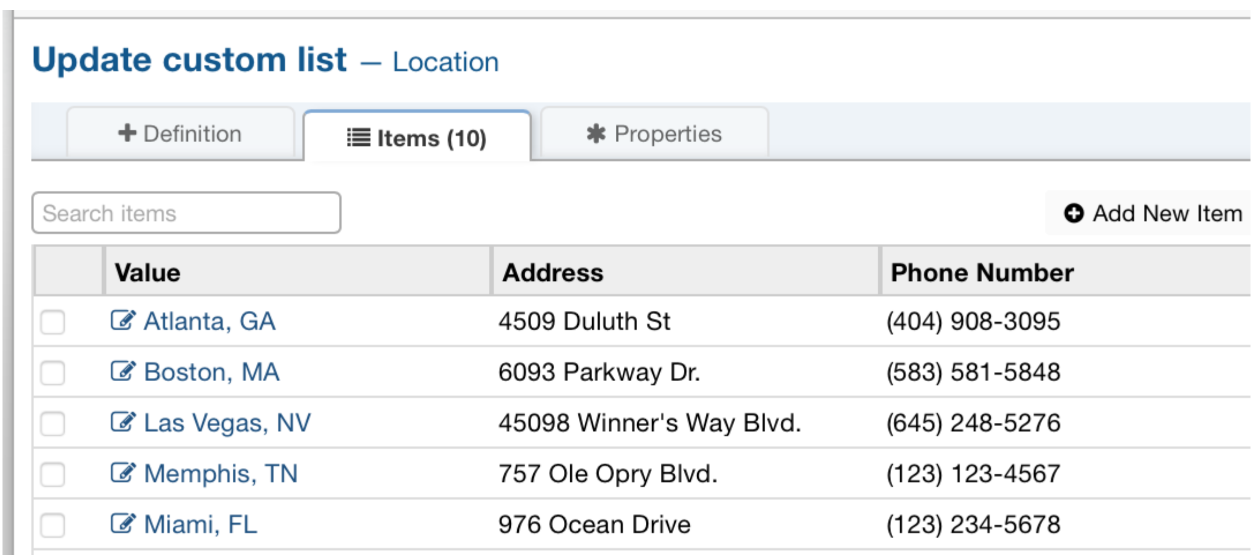
Admin Panel > Manage > Lists

Create New Custom List

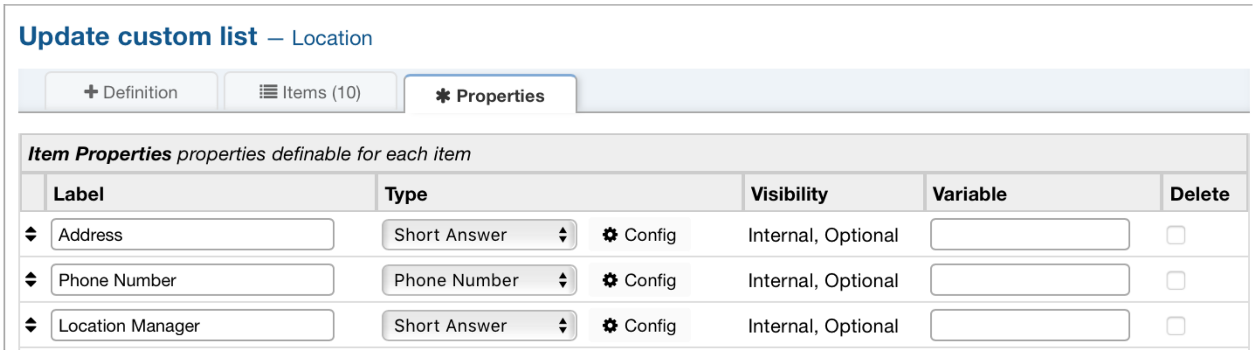


Custom Lists permit the creation of dropdown boxes with predefined options from which an End-User can select on a form. Create a Custom List by going to **Admin Panel > Manage > Lists> Add New Custom List**. The list will show up as a Field Type when creating a field on either a Built-In or Custom Form. Abbreviations are encouraged where applicable as these will be used in association with a list configured as a Type Ahead instead of Drop Down. This Type of List is recommended when you have more than 3 choices.

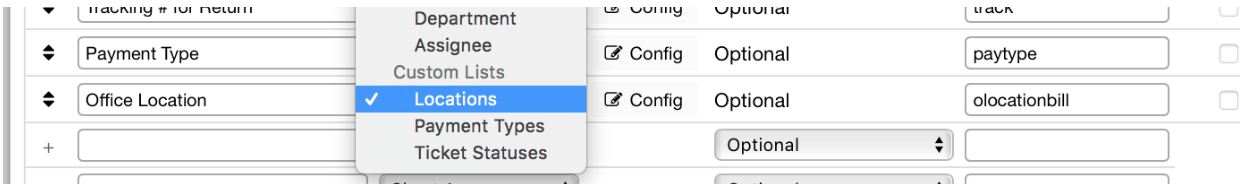
Additional information can be associated with each List item which will be available for Agents to view.



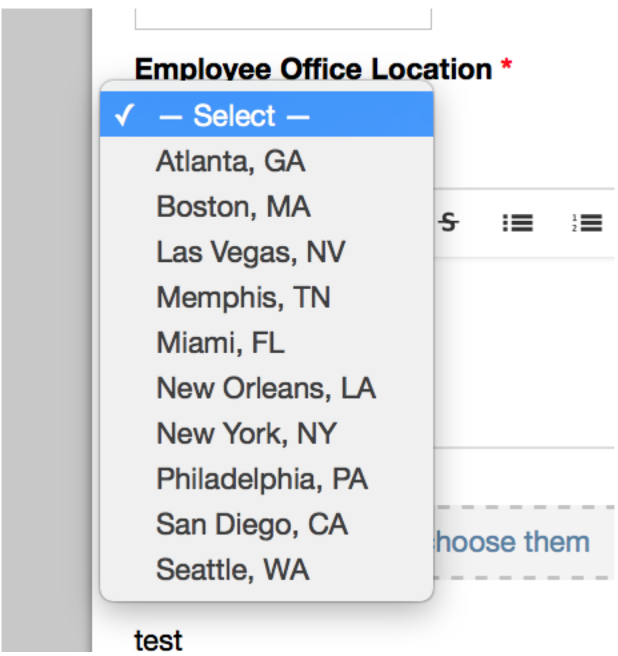
Item Properties help define additional information for which is unique for each List item. The properties will need to be determined when creating the List and then defined per List item.



Custom Lists can then be added to a Custom Form which will allow the specific information to be captured from the End-Users and Agents when creating tickets.



Once an End-User selects a Help Topic that has a Custom Form with the List you've created they will be able to see the List and select a value.



Definition

Name: Name of the custom list. (required)

Plural Name: Plural version of the custom list Name. (not required)

Sort Order: Order you would like the list to be sorted.

Internal Notes: Section for any notes you would like to add.

Properties

Label: Name of the list item.

Type: The type you would like the list item to be.

Visibility: Wether or not you want the item to be seen.

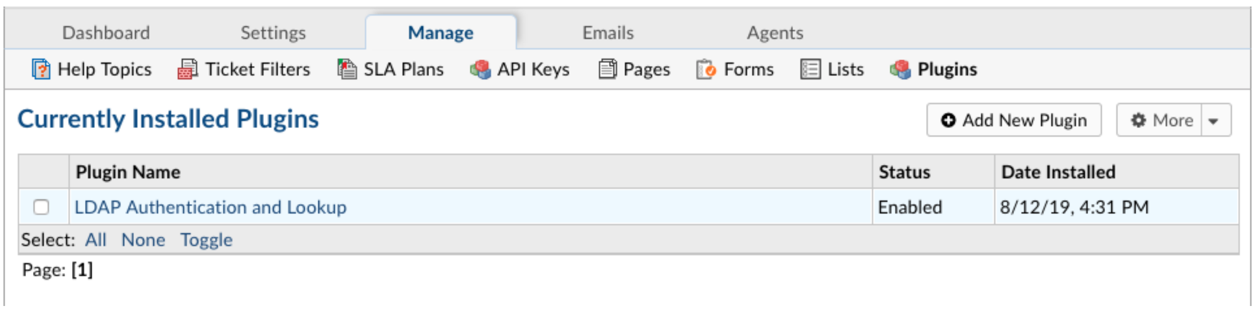
Variable: Variable name for the list item.

Delete: Wether of not you want to delete the list item.

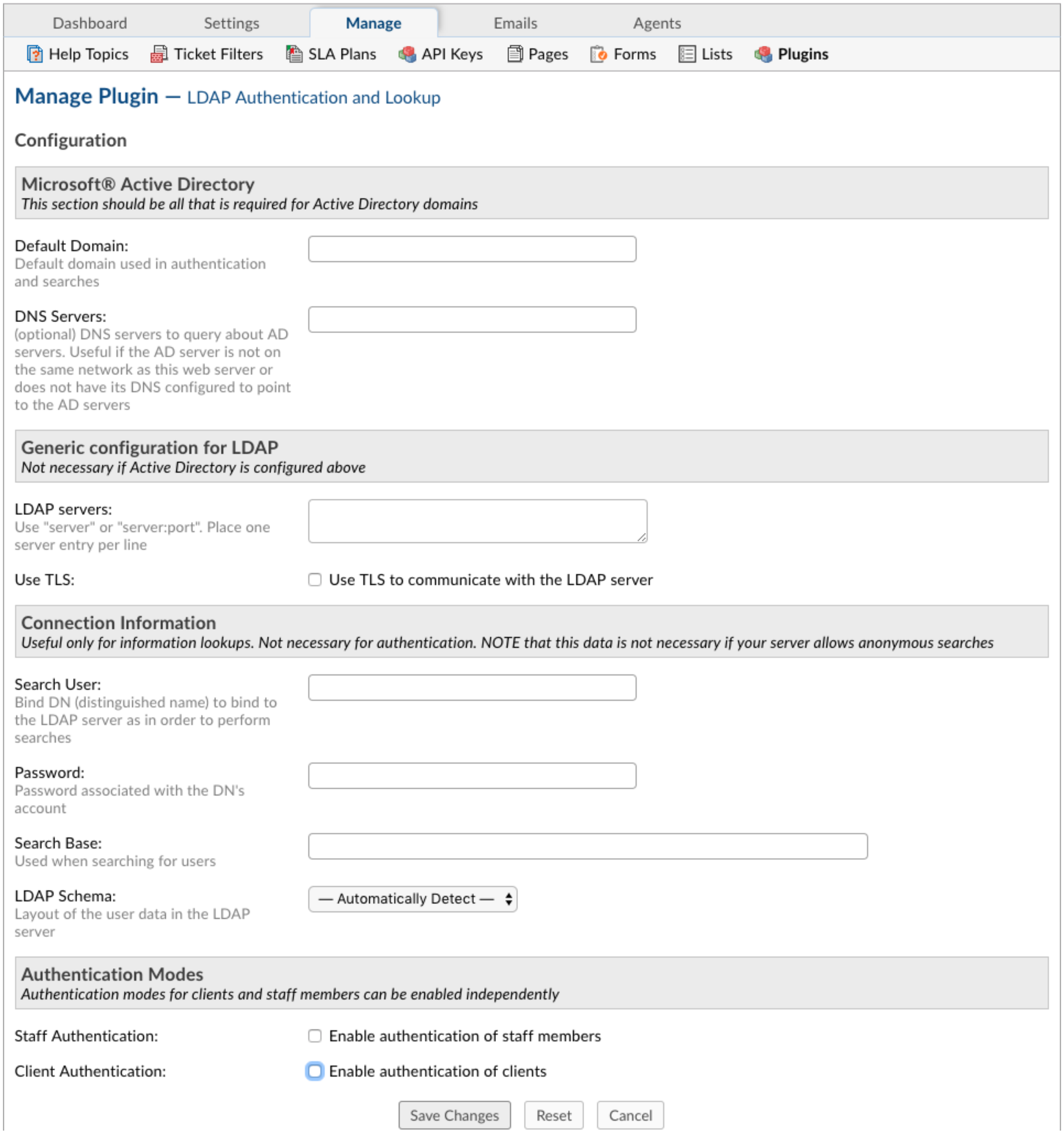
9.3.8 Plugins

Admin Panel > Manage > Plugins

Add New Plugin



To add a plugin into the system, download and place the plugin into the include/plugins folder. Once in the plugin is in the plugins/ folder, it will be shown in the list.



For each plugin the configurations will vary; access and customize them by clicking on the plugin name.

9.4 Emails Tab

9.4.1 Email

An unlimited number of email addresses can be routed through the help desk. You can configure IMAP or POP settings for an email so the system can fetch mail from the mailbox and create tickets. You can also configure SMTP settings for an email so the system can send mail from the address. Additional settings can be configured to change certain things on New Tickets that are fetched from the address.

Add New Email

Admin Panel > Emails > Emails > Add New Email

First, click the **Add New Email** button on the right-hand side of the screen. Once on the Add New Email page you can start by inputting the email address and the name you want the end Users to see as whom the email is from.

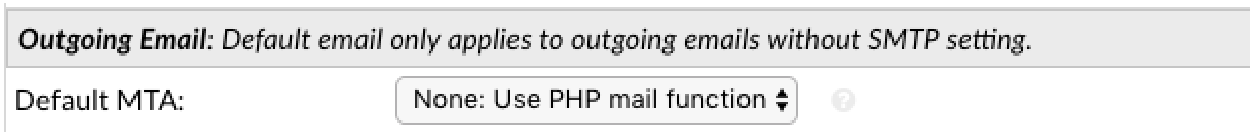
Optionally, configurations such as the Department the ticket will be routed to as well as assigning a Help Topic can be determined for this email address.

You can setup IMAP/POP by clicking **Enable** and filling in the information for the email address.

After you have configured the Mail Account Settings, be sure to enable fetching for the system at **Admin Panel > Emails > Settings**.

Next, you will need to setup the SMTP configurations for the email address in the last section. Click **Enable** and fill in the information for the email address.

Once you have the email's SMTP setup, you will need to make it your System Default Outgoing email address by going to **Admin Panel > Emails > Settings** and changing the second to last box to the email address you just configured SMTP for.



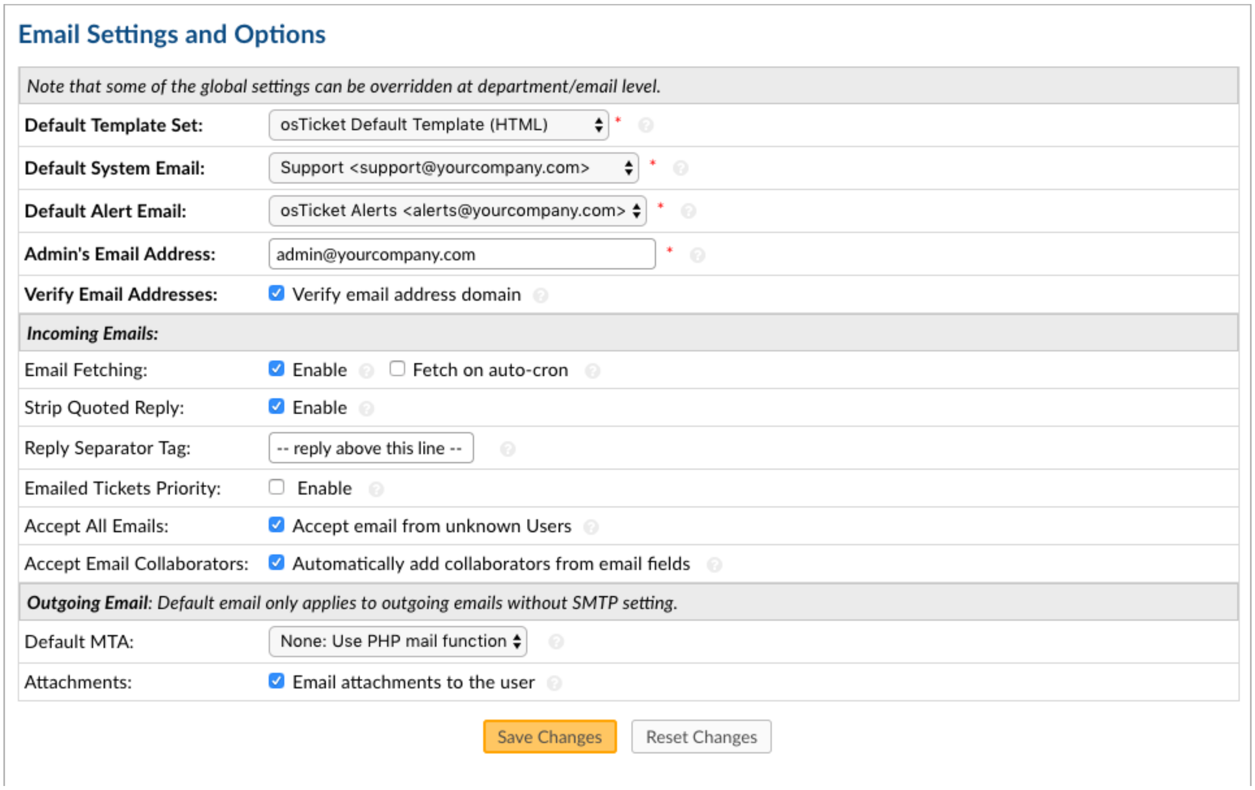
If you would like this same address used for each department, you will need to assign the email address as the outgoing email address for each department individually. You can do this by going to **Admin Panel > Staff > Department > (click on department name)**, go to the **Autoresponder Settings** section, and change the **Auto-Response Email**.

9.4.2 Settings

Admin Panel > Emails > Settings

Settings & Options

The system default email settings can be determined at the Admin Panel > Emails > Settings tab. This includes the Incoming Email global settings, default Outgoing Email address, and enabling Email Fetching.



It can be determined on this sub-tab if Collaborators can be added to tickets via email, if tickets from unregistered (unknown) Users will be accepted, and if Attachments can be emailed to Users from Agents. Please note: Users are considered unknown to your help desk if they are not currently in the User Directory. Users can be added by agents or auto added.

9.4.3 Ban List

Admin Panel > Emails > Ban List

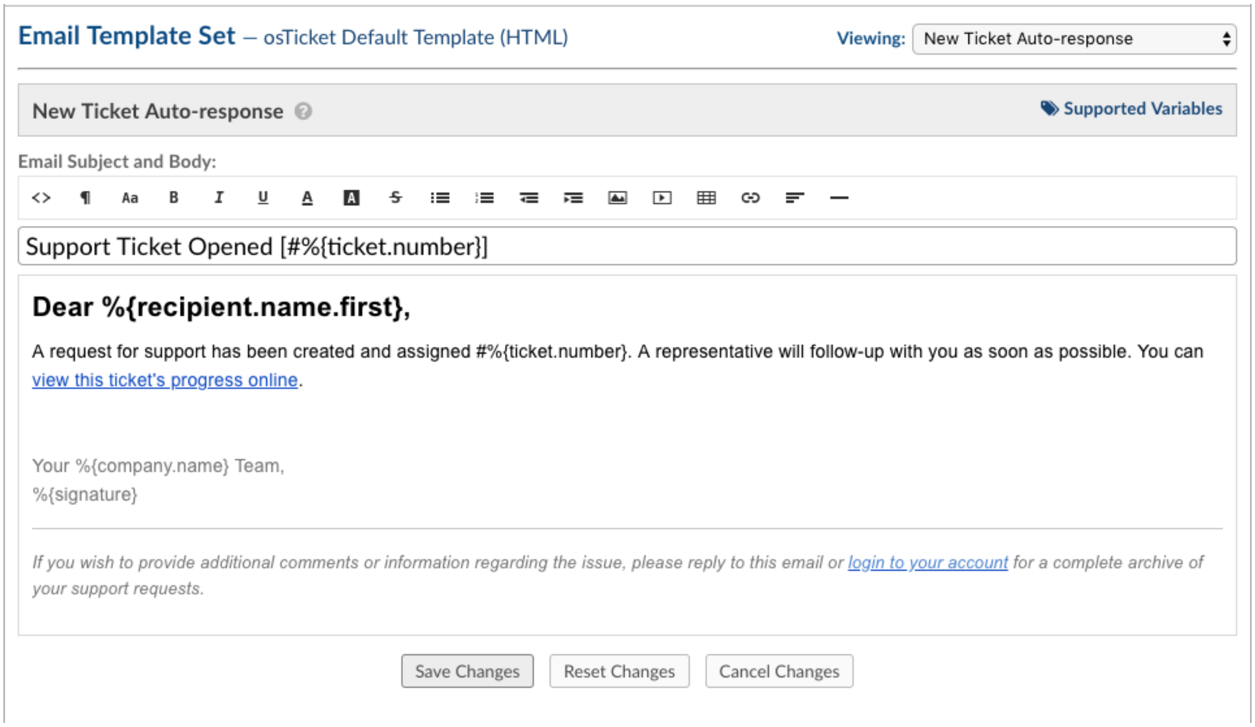
Email addresses that have been banned from the help desk to prevent tickets from being created will be listed here. Email addresses can be added or removed from the Ban List at any time.

9.4.4 Templates

Admin Panel > Emails > Templates

OsTicket contains stock messages that are sent out to both Agents and End Users during specific events of a ticket's life cycle. These email message templates can be edited, disabled globally or locally, as well as cloned and assigned to different Departments. When editing, the messages in the templates each have an HTML/Rich Text toolbar for design and brand flexibility.

All templates can include variables which will automatically pull that information (if available) from a submitted ticket.



The entire set of email templates can be cloned for use and assigned to a specific Department of the Help Desk. This is especially useful if the messages need to be different for tickets assigned to the Department.

Supported variables

An unlimited number of Forms can be built with an unlimited number of fields. You can add a variable name to all fields so that you can use them in Canned Responses and Email Templates. Template Variables utilize the typeahead feature so to populate the available, relevant variables simply type `%{` to initiate the Variable Typeahead and then select the variable name.

Various areas of the helpdesk can contain custom fields such as the Contact/User Information form, Ticket Details form, Organization form, Company Information form, and Task Details form. To use custom form fields in Canned Responses and Email Templates, each variable must be unique.

When editing email templates, only the available variables for use in the message will appear in the drop down. You can further expand the templates where applicable by entering a period after the last character in the variable. This will produce all available extensions for that variable.

Fields on the Organization Information built-in form can be built with this format:

```
%{ticket.user.organization.field_variable}
```

Fields on the User Information built-in form can be built with this format:

```
%{ticket.user.field_variable}
```

Fields on the Ticket Details built-in form or a custom form with defined variables can be built with this format:

```
%{ticket.field_variable}
```

Fields on the Ticket Details built-in form or a custom form involving a Custom List with defined Properties can be built with this format:

```
%{ticket.field_variable.property_variable}
```

Within each email template there is a Supported Variables option in the upper right corner that will provide a partial list of the variables available. As the forms are built out to contain additional fields there will be more variables available to be used in the email templates and canned responses.

Ticket Variables

Please note that non-base variables depend on the context of use.

Base Variables

%{ticket.id}	Ticket ID (internal ID)
%{ticket.number}	Ticket Number (external ID)
%{ticket.email}	Email Address
%{ticket.name}	Full Name — *see name expansion*
%{ticket.subject}	Subject
%{ticket.phone}	Phone number | ext
%{ticket.status}	Status
%{ticket.priority}	Priority
%{ticket.assigned}	Assigned Agent / Team
%{ticket.create_date}	Date Created
%{ticket.due_date}	Due Date
%{ticket.close_date}	Date Closed
%{ticket.recipients}	List of all recipient names
%{recipient.ticket_link}	Auth. token used for auto-login Agent's ticket view link

Expandable Variables

%{ticket.topic}	Help Topic
%{ticket.dept}	Department
%{ticket.staff}	Assigned/closing agent
%{ticket.team}	Assigned/closing team
%{ticket.thread}	Ticket Thread

Other Variables

%{message}	Incoming message
%{response}	Outgoing response
%{comments}	Assign/transfer comments
%{note}	Internal note *(expandable)*
%{assignee}	Assigned Agent / Team
%{assigner}	Agent assigning the ticket
%{url}	osTicket's base url (FQDN)
%{reset_link}	Reset link used by the password reset feature

Name Expansion

.first	First Name
.last	Last Name
.full	First Last
.short	First L.
.shortformal	F. Last
.lastfirst	Last, First

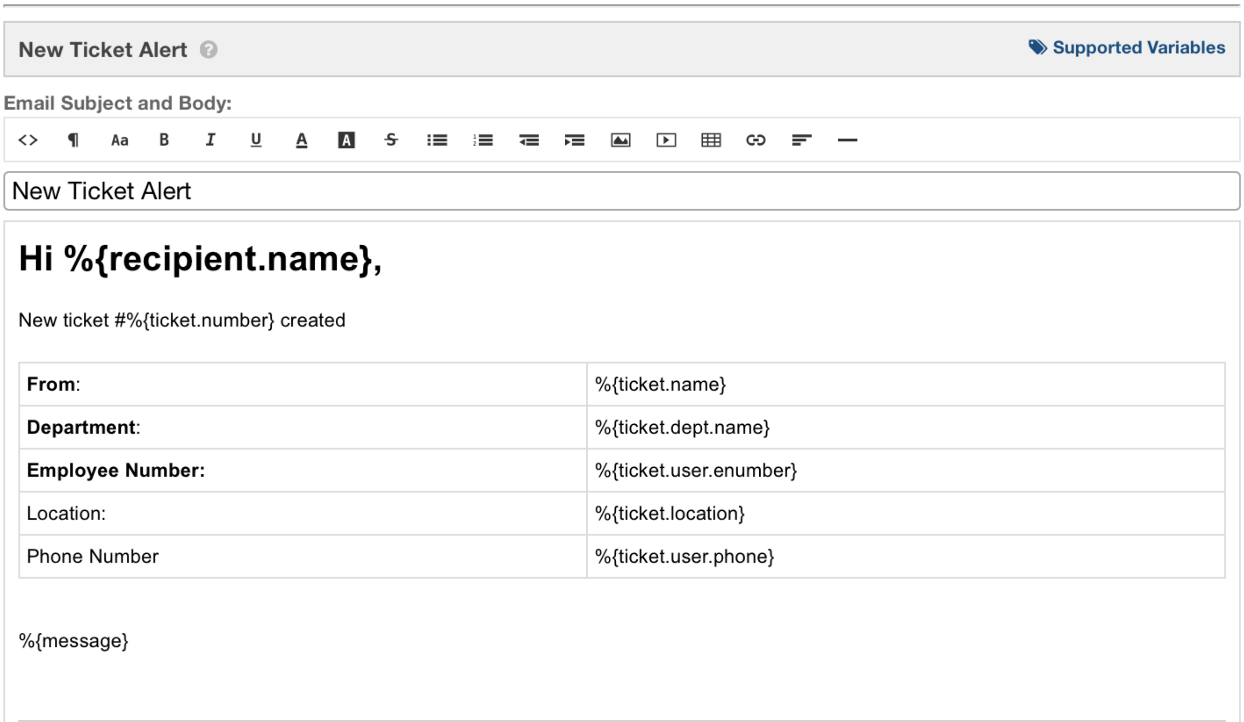
Ticket Thread expansions

.original	Original Message
.lastmessage	Last Message

Thread Entry expansions

.poster	Poster
.create_date	Date Created

Using both built in form fields and any custom form fields, email templates can be edited to contain the information provided by the End-User if there information in those fields on the forms otherwise the variable name will appear in the email template.



9.4.5 Diagnostics

Admin Panel > Emails > Diagnostics

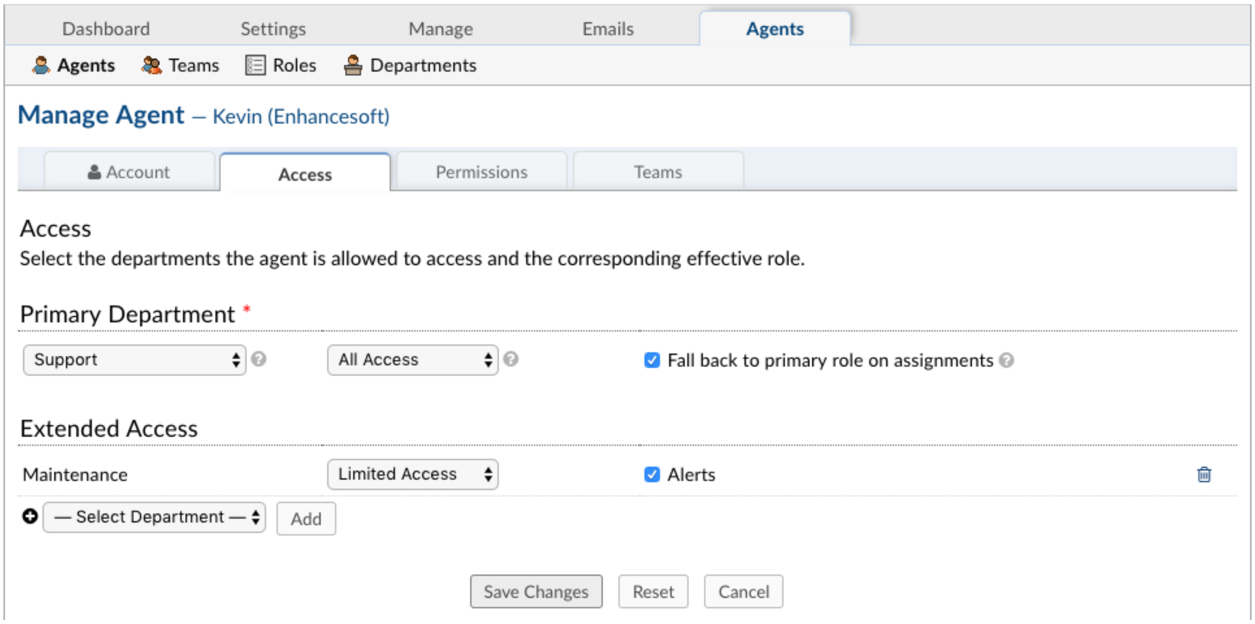
Test Outgoing Mail

Tests whether your Outgoing Email settings are properly established.

9.5 Agents Tab

9.5.1 Agents

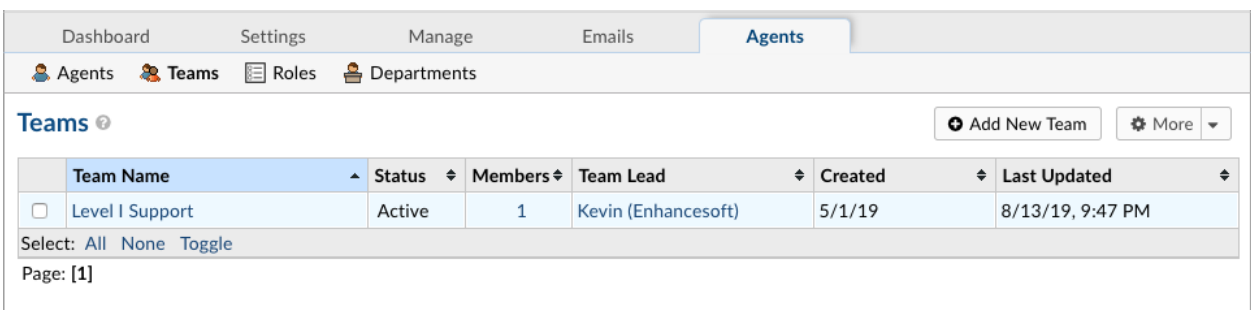
Admin Panel > Agents > Agents



Agents are given access to the help desk with the intent to respond and resolve the tickets. When adding an Agent to the help desk, they will need to be assigned to a Primary Department and given a Primary Role for the Tickets/Tasks routed to that department. Agents can be given Extended Access to additional departments of the help desk as well as assigned different Roles to those departments; this can be configured in the Access tab of the Agent's Profile.

9.5.2 Teams

Admin Panel > Agents > Teams



How to Create Teams In Your Help Desk

Teams allow you to pull Agents from different Departments and organize them to handle a specific issue or user via a Help Topic or Ticket Filter.

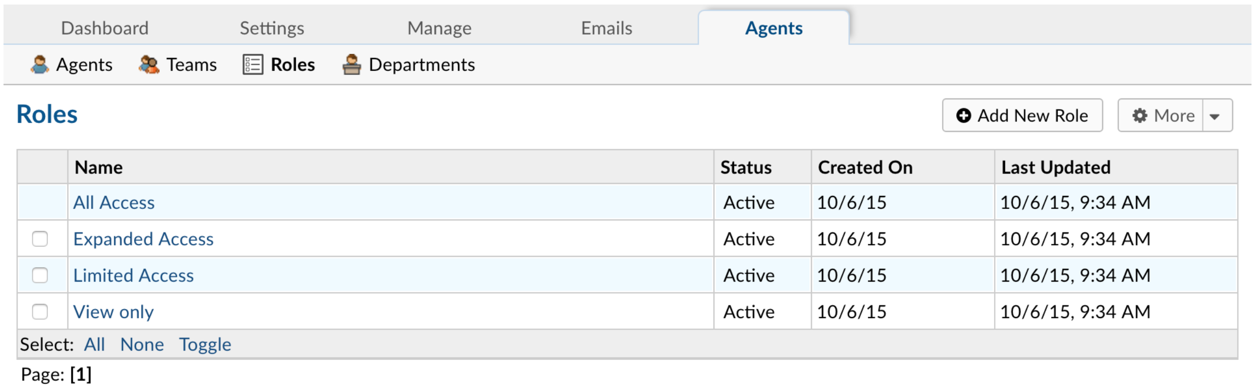
Having Agents from different Departments assigned to a Team will supersede the parameters of the Agents' Department rules. For example, you can create a Help Topic associated with a particular product you produce, and assign it to a Team of specialist Agents from different Departments.

To create a Team in your Admin Panel, locate the Agents tab, and click on Teams. Then click Add New Team on the right, and fill out the appropriate information. Then you will be able to add Agents to the team by clicking on their name from your list of Agents and checking the corresponding box next to the Team name you wish to add them at the bottom of the page.

A Team can have an appointed leader who can receive Alerts & Notices separate from other team members. In order to set a Team Leader you can choose an Agent from the Team Lead dropdown when creating a Team or Editing an existing Team.

9.5.3 Roles

Admin Panel > Agents > Roles



Roles are the permissions granted to Agents per Department that they have access to. Each Role has a set of permissions that can be checked/unchecked for agents given that Role in association with a Department they have access to. An unlimited number of roles can be created and assigned to Agents with access to various departments.

Role Permissions for Tickets include:

Assign: Ability to assign tickets to agents or teams

Close: Ability to close tickets

Create: Ability to open tickets on behalf of users

Delete: Ability to delete tickets

Edit: Ability to edit tickets

Edit Thread: Ability to edit thread items of other agents

Post Reply: Ability to post a ticket reply

Refer: Ability to manage ticket referrals

Release: Ability to release ticket assignment

Transfer Ability to transfer tickets between departments

Role Permissions for Tasks include:

Assign: Ability to assign tasks to agents or teams

Close: Ability to close tasks

Create: Ability to create tasks

Delete: Ability to delete tasks

Edit: Ability to edit tasks

Post Reply: Ability to post task update

Transfer: Ability to transfer tasks between departments

Role Permissions for the Knowledge Base include:

Premade: Ability to add/update/disable/delete canned responses

If granted access to the Admin Panel, that Agent will have the ability to make changes in the configurations of the help desk. From the Agent tab of the Admin Panel, the configurations of each Agent of the help desk can be modified, including the ability to Limit an Agent's access to only tickets that are specifically assigned to them.

The Permissions tab of the Agent profile allows the Agent functionality within the help desk which are not Department specific access items. Areas such as the User Directory, Organization, and Knowledge Base can be limited per Agent. This includes the ability to search for and see the ticket metadata for tickets the Agent does not have access to, the email ban list, and other staff statistics on the dashboard.

Permissions include:

Users:

Create: Ability to add new users

Edit: Ability to manage user information

Delete: Ability to delete users

Manage Account: Ability to manage active user accounts

User Directory: Ability to access the user directory

Organizations:

Create: Ability to create new organizations

Edit: Ability to manage organizations

Delete: Ability to delete organizations

Knowledge Base:

FAQ: Ability to add/update/disable/delete knowledgebase categories and FAQs

Miscellaneous:

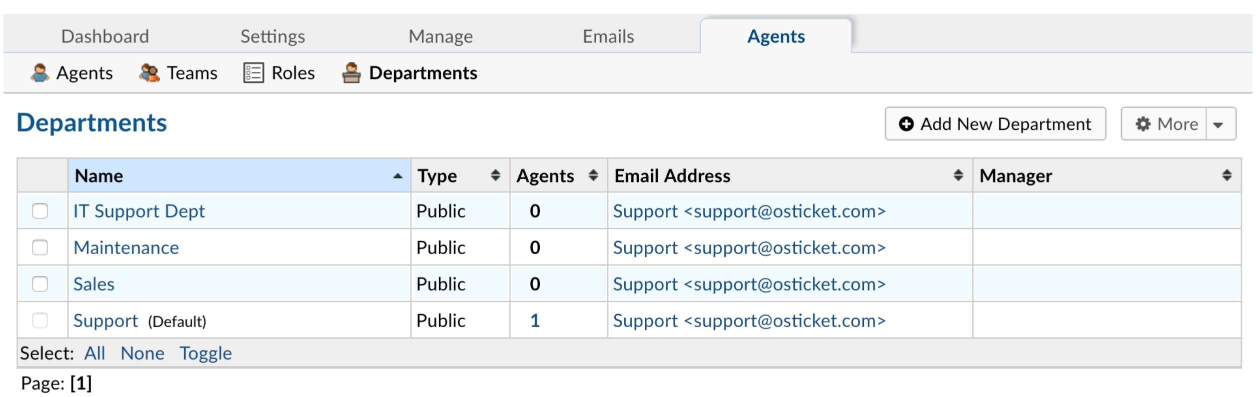
Banlist: Ability to add/remove emails from banlist via ticket interface

Search: See all tickets in search results, regardless of access

Stats: Ability to view stats of other agents in allowed departments

9.5.4 Departments

Admin Panel > Agents > Departments



Since tickets are routed through Departments in the help desk, there are many settings that can be set for each Department.

Department Information:

Parent: If nesting departments, this is the Parent Department to nest the department under. Please note: If an agent has access to the Parent Department, they will see the tickets of nested or child departments also, but access does not extend from child departments to Parent Departments.

Status: The status of the department will determine its visibility as well as if tickets can be routed to that department.

Active: The department is available when transferring tickets.

Archived: The department is no longer in use and cannot be selected to transfer any ticket. Also, if tickets in that department are reopened via an End-User response it will create a new ticket referencing the original ticket number and subject line but the department will be the system default.

Disabled: Tickets can no longer be transferred to this department and any tickets set up to be auto routed to this department will now be routed to the default department in the Helpdesk. Closed tickets in this department will reopen if the End-User responds.

Name: Department name as it will be displayed throughout the helpdesk.

Type: Select Private if you wish to mask assignments to this Department in the Client Portal. Additionally, when labeled as Private, the **Department Signature** will not be displayed in email replies. At least one department of the help desk must be Public.

SLA: Service Level Agreement for tickets routed to this Department. This the expected amount of time (in hours) that a ticket is expected to be closed once opened. If the ticket is not closed in the allotted amount of time, it will then be Overdue.

Manager: Electively, select a **Manager** for the departments of the help desk. Managers can be configured to receive special alerts and also have the right to un-assign tickets.

Ticket Assignment: Enable this to restrict ticket assignment to include only members of this Department. Department membership can be extended to based on Agent's Department Access, if **Alerts & Notices Recipients** includes those with department access.

Claim on Response: Check this to **disable** auto-claim on response/reply for this department. Agents can still manually claim unassigned tickets.

Outgoing Email Settings:

Outgoing Email: Email Address used when responses are sent to Users when Agents post Responses to Tickets.

Template Set: Email **Template Set** used for Auto-Responses and Alerts & Notices for tickets routed to this Department. Template sets can be cloned and edited for department use in the Admin Panel > Emails > Templates.

Auto Responder Settings: This allows you to override the global Autoresponder settings for this Department.

New Ticket: If checked, this will disable the New Ticket Auto-Response sent to the User when a new ticket is created and routed to this Department.

New Message: If checked, this will disable the Auto-Response sent to the User to confirm a newly-posted message for tickets in this Department.

Auto-Response Email: Select an email address from which Auto-Responses are sent for this Department; this email would send only auto-response messages, not Agent responses.

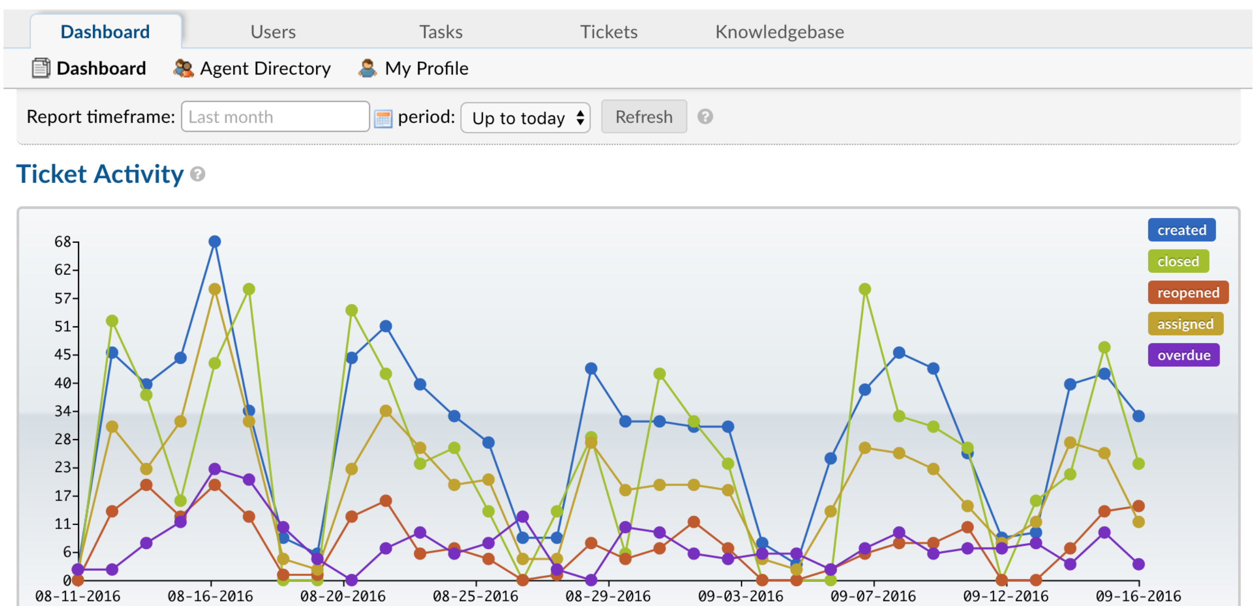
CHAPTER 10

Agent Panel

10.1 Dashboard Tab

10.1.1 Dashboard

Agent Panel > Dashboard > Dashboard



Meant to be a historical marker of the metadata in your help desk, the Dashboard will give you an overview of tickets in your help desk. The data can be filtered by date as well as Departments, Help Topics, and Agents. This data can also be exported into a CSV file.

Opened

Tickets that were originally opened having the Department or Help Topic on the ticket. When a ticket is created, one item will be added to Opened. For the Agents tab, the Opened column reports how many tickets an agent has manually opened on behalf of a User.

Assigned

Tickets that have been assigned to either an Agent or a Team while also being in the Department or Help Topic listed in the column, or tickets that were assigned to the Agent listed in the column, within the timeframe chosen. The number reflects tickets that are manually assigned to agents or teams, claimed tickets, tickets assigned from ticket filters, tickets assigned based on help topics, and tickets assigned based on user organizations. The number does not reflect tickets where an agent is automatically assigned to a ticket that they they have responded to. Note that if the ticket was assigned to a Team, the report numbers for Agents will not change, even if they are in the team selected.Tickets can be auto-assigned to certain departments and/or agent based on your set up of emails and filters. Tickets can also be assigned internally to other agent/departments. The system tracks each time the ticket is assigned. The colored circles signify the same as above.

Overdue

Tickets that have been marked 'Overdue' by the system while having the Department, Help Topic, or Agent on the ticket as well, within the timeframe chosen. Tickets are marked Overdue when they have violated the SLA Plan to which they belonged, causing them to have a status of 'Open' past their Due Date

Closed

The number of Tickets in the Department that are currently in the Closed status while having the Department, Help Topic, or Agent on that ticket, within the timeframe chosen. If the ticket is reopened, the number of closed tickets decreases by 1 and the number of Reopened tickets for the department increases by 1.

Tickets can be closed three ways:

> **A.** Go to the ticket listing page, highlight the selected ticket by checking the box on the far left side of the screen. Once the ticket(s) are selected, scroll to the bottom of the page and click on the "close" button in the middle. A pop-up box will appear to ask about closing the selected tickets. Press "Yes" to continue to close the tickets.
>
> **B.** A ticket can be closed when clicking on the ticket to view the contents of the ticket- this will not send a notification to the sender. At the top right of the ticket screen, there will be buttons including "close". When pressed, a dialogue box will pop-up asking for internal documentation of why the ticket is being closed. Although not required to close the ticket, it is highly recommended.
>
> **C.** A ticket can also be closed under the "Post Internal Note" tab at the bottom of a ticket. In order to close a ticket in this manner, you must include an internal note then change the "Ticket Status" for that ticket to "closed."

Reopened

The total number of times a ticket was Reopened while having the Department, Help Topic, or Agent listed for the ticket within the timeframe chosen. If a Closed Ticket's status is changed from Closed to Open, an item is added to Reopened and removed from Closed.

Tickets can be reopened in two ways:

> **A.** A customer can respond to a ticket that agent has closed internally.
>
> **B.** Select and click on a "closed" ticket > (scroll to the bottom of the ticket) > Post Internal Note > Change Ticket status.

Deleted

The amount of tickets that have been deleted while having the Department, Help Topic, or Agent listed for the ticket within the timeframe chosen.

Service and Response Time calculate the values for the Departments, Help Topics, or Agents based on what is currently on a ticket. These values are calculated in hours with decimals representing minutes. In order to convert the decimals to minutes, you should multiply the decimal by sixty.

Service Time

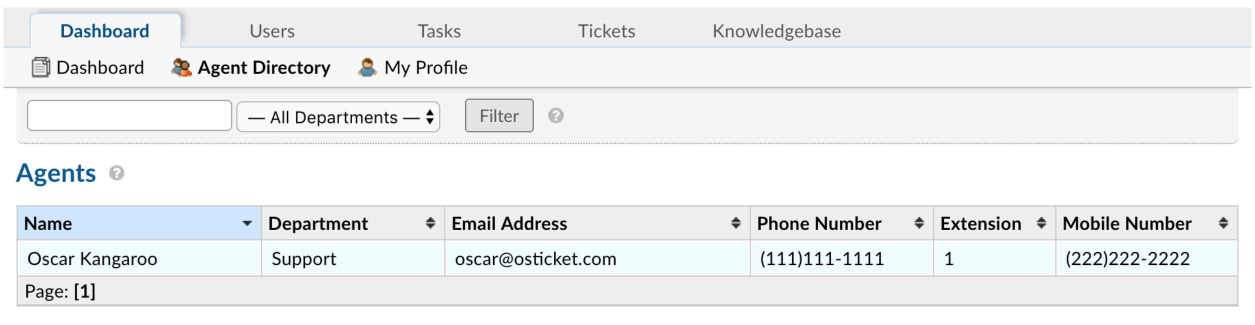
Refers to the duration of time that begins at the opening of a ticket and ends when the ticket is closed without being reopened again. The Service Time column measures the average Service Time per ticket, in hours, within the specified date span.

Response Time

Shows an average of the number of hours between when a user posted a message on a ticket and when an agent responded/replied to the customer.

10.1.2 Agent Directory

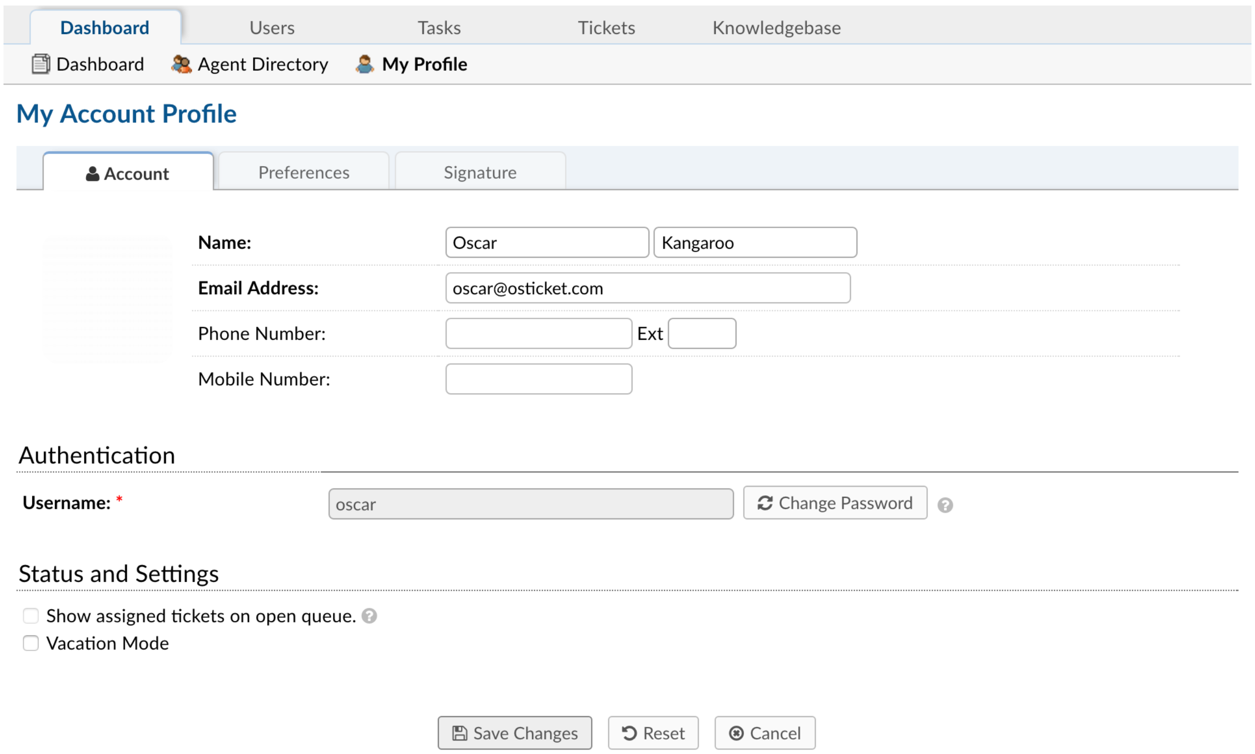
Agent Panel > Dashboard > Agent Directory



This is where to find all of the information about every Agent in the help desk.

10.1.3 My Profile

Agent Panel > Dashboard > My Profile



Account

General

Name: Agent's First and Last name.

Email Address: Agent's email address.

Phone Number: Phone number for Agent.

Extension: Phone number extension (if applicable)

Mobile Number: Agent's Mobile phone number.

Authentication

Username: Agent's username.

Status & Settings

Show assigned tickets on open queue: Shows assigned tickets on open queue.

Vacation Mode: Agent will not receive ticket notifications or emails until disabled.

Preferences

Profile Preferences & Settings

Maximum Page Size: Maximum number of tickets per page.

Auto Refresh Rate: Tickets page refresh rate in minutes.

Default From Name: From name to use when replying to a thread.

Thread View Order: The order of thread entries.

Default Signature: Default signature used when replying to a thread.

Default Paper Size: Paper size used when printing tickets to PDF.

Reply Redirect: This setting defines where the system will redirect you after posting a Reply on a ticket. There are two options, `Queue` and `Ticket`. If set to `Queue` the system will redirect you to the previous Ticket Queue you were viewing. If set to `Ticket` the system will redirect you back to the same ticket you posted a Reply on so you may continue working on it. The default value for this setting is `Ticket`.

Localization

Time Zone: The time zone for Agent.

Time Format: Time format preferred.

Preferred Locale: Language preference.

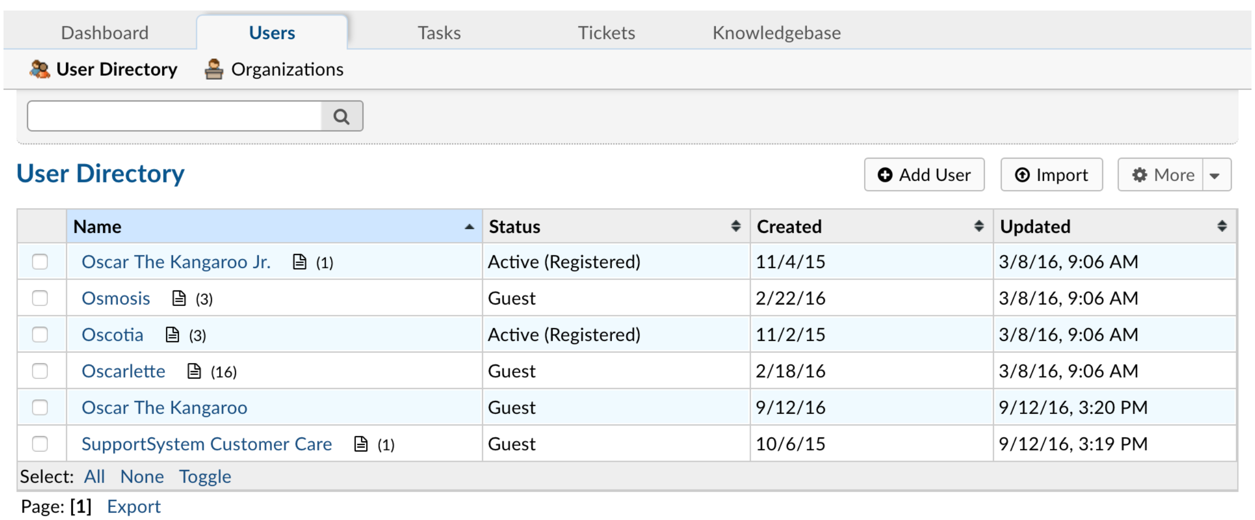
Signature

The signature for the Agent.

10.2 Users Tab

10.2.1 User Directory

Agent Panel > Users > User Directory



Users can now create an account and log-in to create a ticket or check a ticket's status. As always with osTicket, users or ticket creators are associated with their email address as the unique identifier of each user. The User Directory, located on the Agent Panel, allows agents to search tickets by user as well as create Organizations to associate the user to. Agents can be configured as internal Account Managers for tickets created by users of an Organization.

What is a User?

Users are the ticket owners of the tickets in the help desk. When a ticket is created in the help desk, the user is associated with their email address in the User Directory of the help desk. Users can be added or deleted from the User Directory of the help desk at any time. Please note, if the user is deleted the tickets of the user must also be deleted.

Add New Users

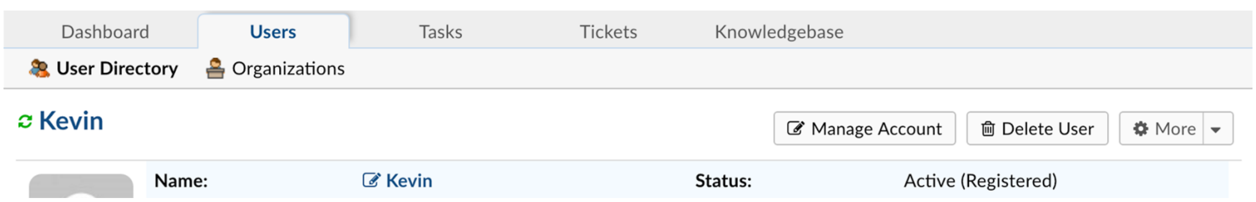
You can add users to the User Directory of the Agent Panel of the help desk either individually or by importing them by uploading a CSV file. If you are uploading, you will need to match the headers of the CSV to the fields in the Contact Information built-in form. Once you add the user, you can associate the User to an Organization of the help desk.

Guest User vs Registered User

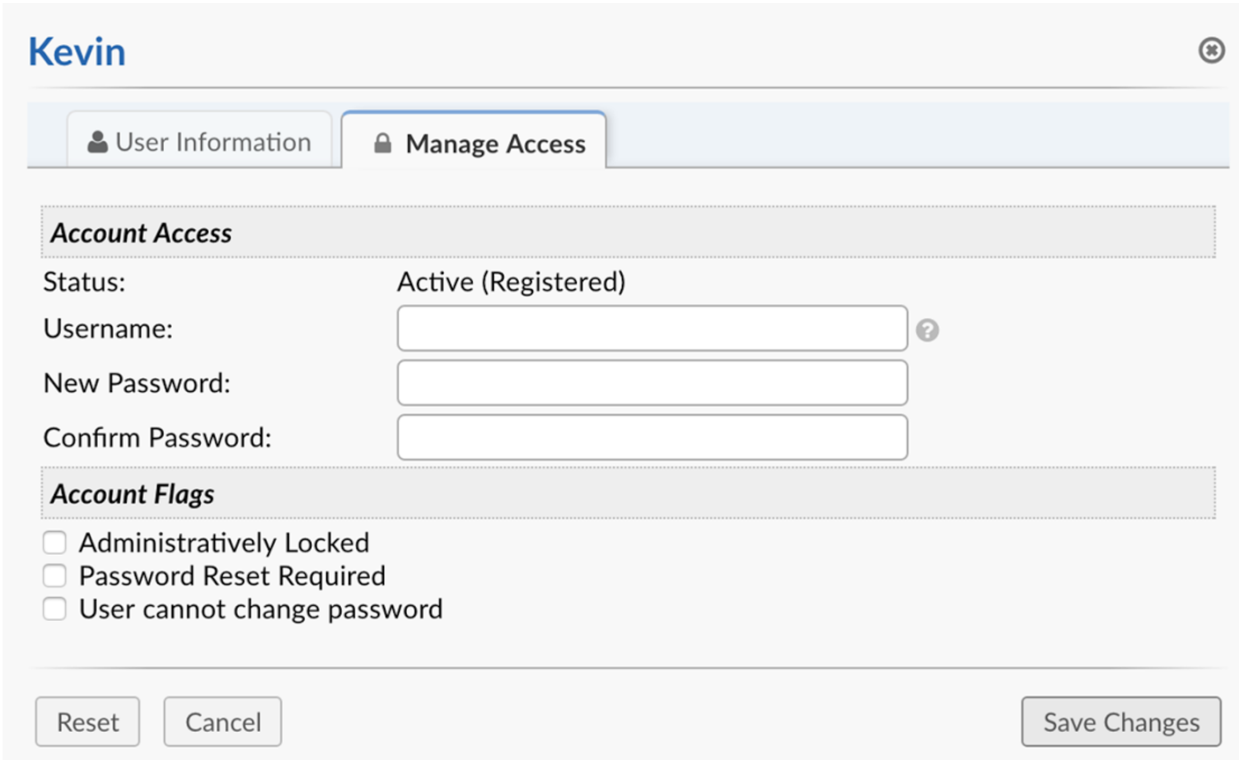
You can choose to have your users register prior to submitting a ticket to your help desk from your Client Portal from Agent Panel > Users > User Directory > More > Regis. If a User is registered, this means they have created an account and verified their email. Once registered, they will be able to access all tickets they have in the help desk. Users can create their own User account or they can be added from the Agent Panel of the help desk. If added internally, the Agent will need to send the registration email for the User to verify their email address prior to becoming a registered user. Guest Users don't require registration to submit tickets.

Managing Registered Users

Once a user has activated their account with the help desk, Agents can administratively manage their access to the help desk; including requiring a password reset, locking them from the help desk, and even resetting their password. The User management feature is accessible by opening the configurations of that user and clicking the Manage Account quick button at the top right of the header.

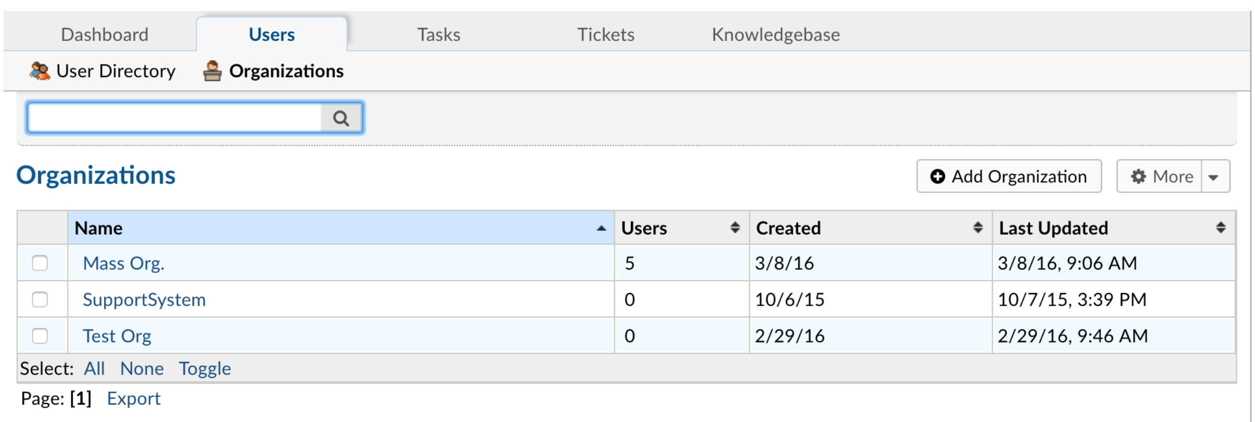


A pop up box will appear; click on the Manage Access tab to configure these features.



10.2.2 Organizations

Agent Panel > Users > Organizations



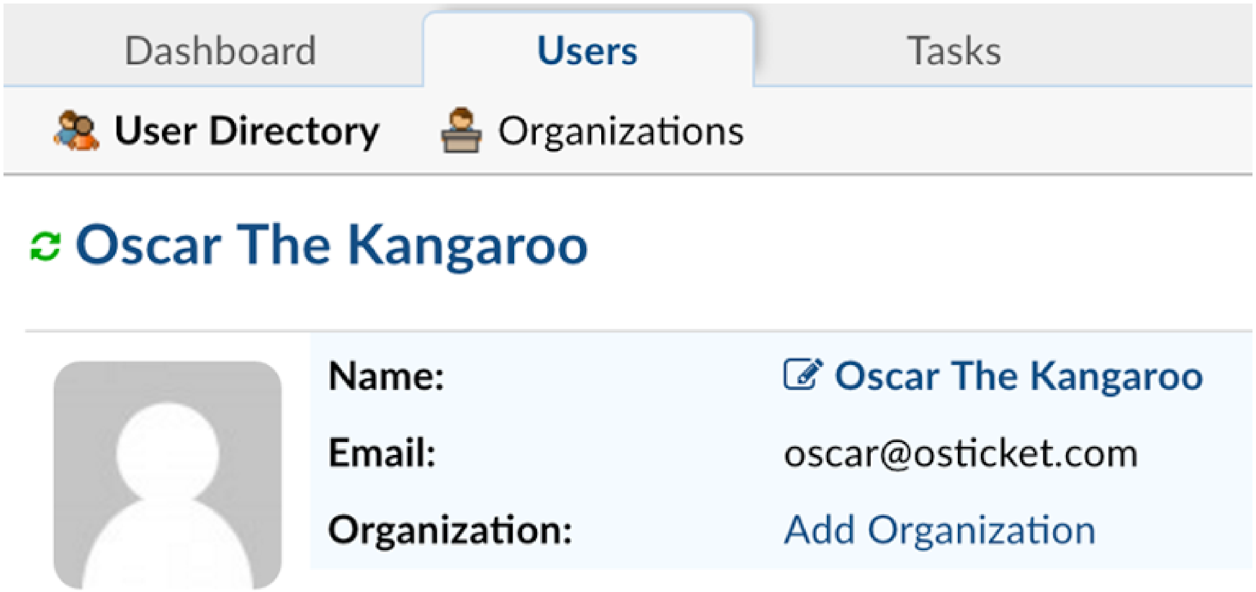
Organizations can be created to add/associate users in the help desk to the organization. Within the Organization Directory, the settings can be edited to add agents as Account Managers of the Organization which will allow them to be auto-assigned to all tickets created by users of that organization.

Primary Contacts can be selected from the Organization's users to enable them to be added as collaborators for all tickets created in association with the users of the organization.Users can also be select to auto-add all users from the organization to each ticket created by a user of the organization. The same rules apply for sharing tickets of the users of the organization.

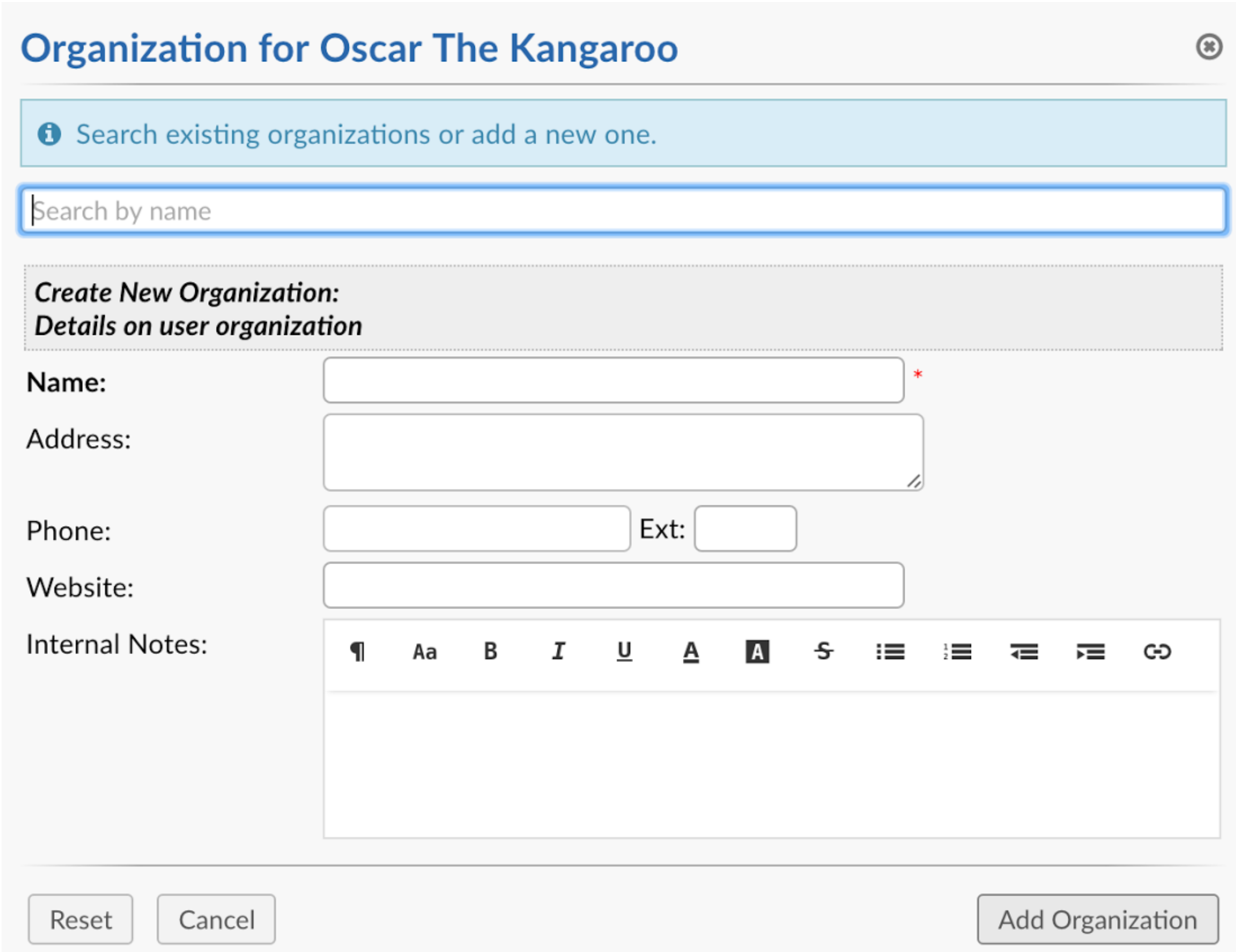
Organizations are located in the User Directory of the Agent Panel. Each ticket created in the help desk is associated to a user via their unique email address. Organizations allow a way to manage users and associate them with one

Organization in the help desk. Organizations can reflect companies, clients, departments or any group that users can belong to in the help desk. This is useful in determining tickets by organization as well as users of the organization.

Users can be added to an organization by the specific user's profile by clicking "Add Organization" on the header.

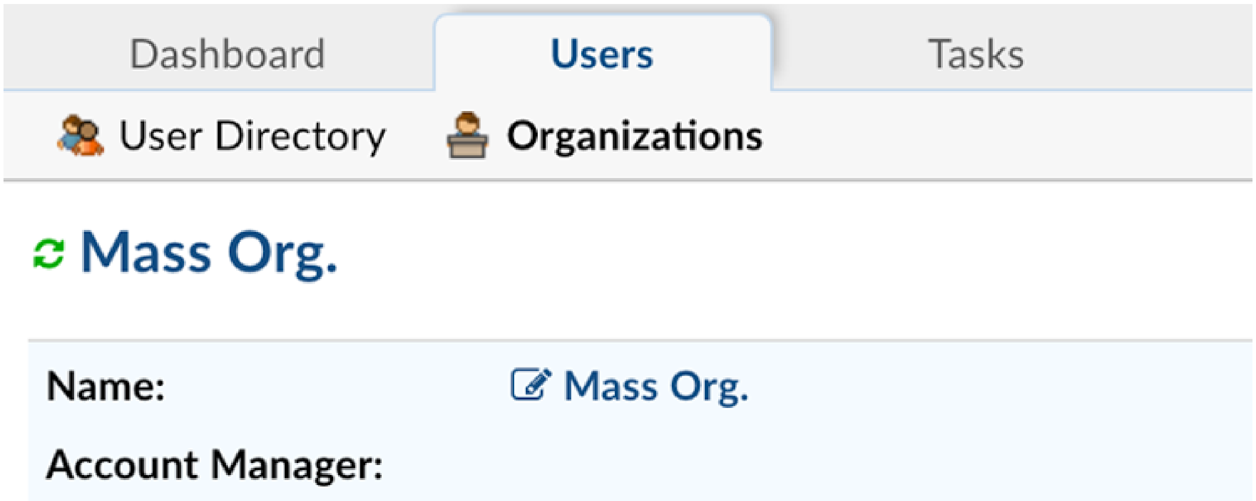


A pop-up box will appear allowing the organization can be searched from the top toolbar of the pop up or created if it does not currently exist.

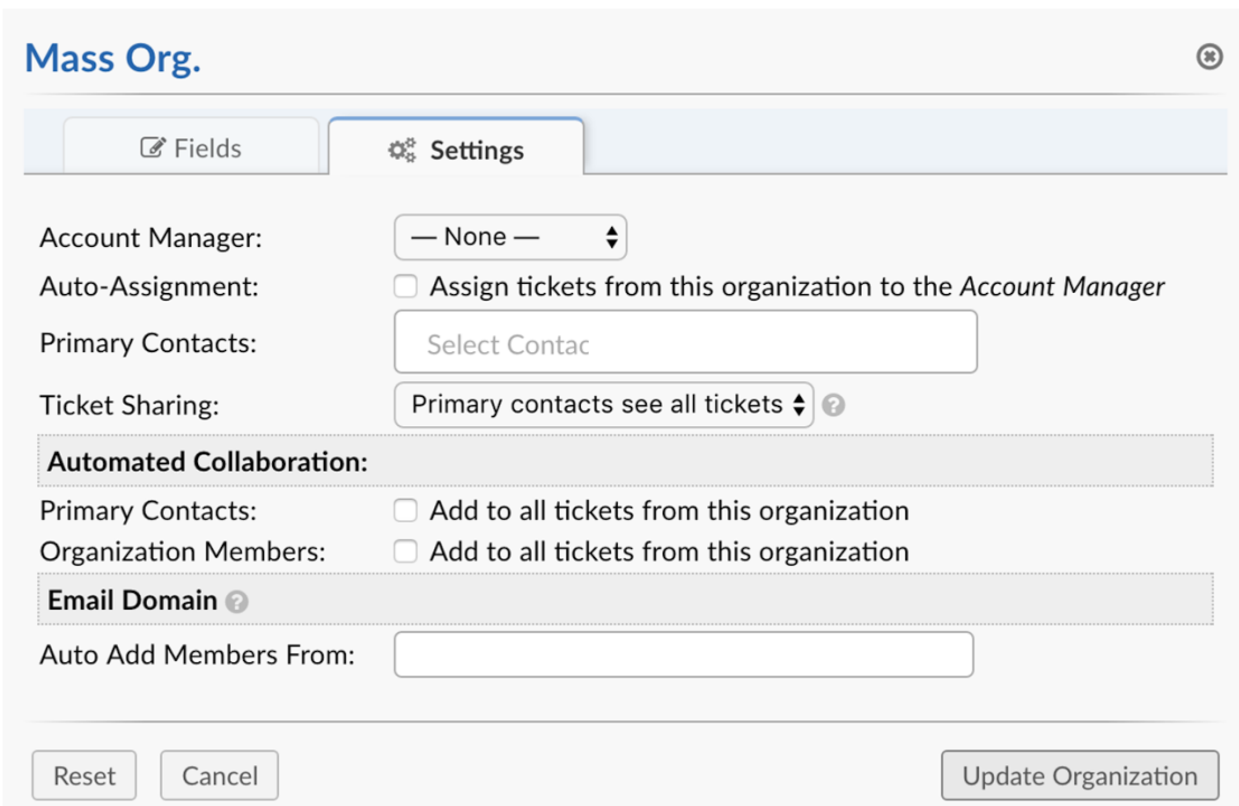


If the user is not currently in the user directory, they can be imported from the organizations' tab; these users would automatically be added to the organization they are imported into. Once the Users are in the Organization, specific users of the organization can be delegated as primary contacts and selected to be auto-collaborated to all ticket open by users of that organization. If configured, these users will be added to any ticket created by users of that organization allowing them access to view these tickets from the client portal.

These settings can be found by clicking on the Organization name with the square and pencil next to it.



When you click on the organization name to configure the settings, a pop-up box will appear; go to the Settings tab of the pop-up.



Settings of the organization include the ability to assign an Agent or Team as the Account Manager of the Organization. By being the Account Manager, these agents can receive specific Alerts and Notices during different events in the ticket's life cycle for tickets created by users assigned to the Organization. Tickets of this organization and every user assigned to the Organization can be auto-assigned to the Account Manager selected.

Primary contacts are users of the Organization which can be auto-collaborated to all tickets of the organization. All members of the organization can also be added as collaborators to all tickets of the Organization if necessary.

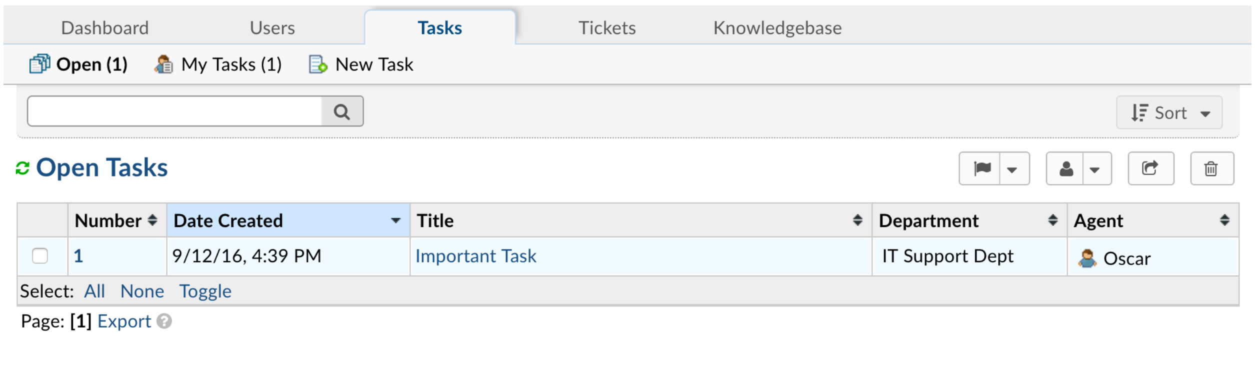
To auto-add members to the organization based on the domain or subdomain of their email, add the email domain to the last section of the Organization settings. More than one email domain can be entered per organization by comma separating the email domains.

Fields of the Organization can be managed by going to the Admin Panel > Manage > Forms > Built in Forms > Organization Information. Fields added here will be collected on all Organizations when created or edited. Custom forms can be added to an individual Organization from the "More" quick button on the right top side of the table when in an Organization configurations page.

10.3 Tasks Tab

10.3.1 Tasks

Agent Panel > Tasks



Considered an internal to-do list of sorts, **tasks** are only visible to Agents of the help desk with access to the Department the task is assigned to. Tasks can be associated with Tickets of the help desk or created and assigned independent of Tickets.

If a task is created in association with a ticket, the ticket can not be closed until all tasks are marked as complete. Tasks can be created in association with a ticket from the top of the Ticket thread; directly below the ticket header. An unlimited number of tasks can be created for the ticket and assigned to any department or agent of the help desk. Note: if the agent assigned to a task associated with a ticket does not have Department Access to the ticket's department, they will not see the thread of the ticket; only the ticket meta data and the task to which they are assigned.

Tasks that are dependent on a ticket as well as those independent of a ticket will appear in an agent's Task tab of the Agent Panel. Only those tasks assigned to the Department(s) the agent has access to will show in the agent's task tab. If the task is associated with a ticket, the task header will contain a linked reference to the ticket for the agent.

Fields required to create a task include the Task Summary, Task Detail, and the Department to which the task is assigned. Other optional fields when creating a task include the Assigned Agent or Due Date. Fields of the Task Form can be expanded in the Admin Panel > Manage > Forms > Task Details built-in form.

There are messages which can be enabled to alert agents of the events in a Task's lifecycle. These messages can be enabled in the Admin Panel > Settings > Tasks and include:

> **New Task Alert:** Alert sent out to Agents when a new task is created.
>
> **New Activity Alert:** Alert sent out to Agents when a new message is appended to an existing task.
>
> **Task Assignment Alert:** Alert sent out to Agents on task assignment.
>
> **Task Transfer Alert:** Alert sent out to Agents on task transfer between Departments.
>
> **Overdue Task Alert:** Alert sent out to Agents when a task becomes overdue based on SLA or Due Date.

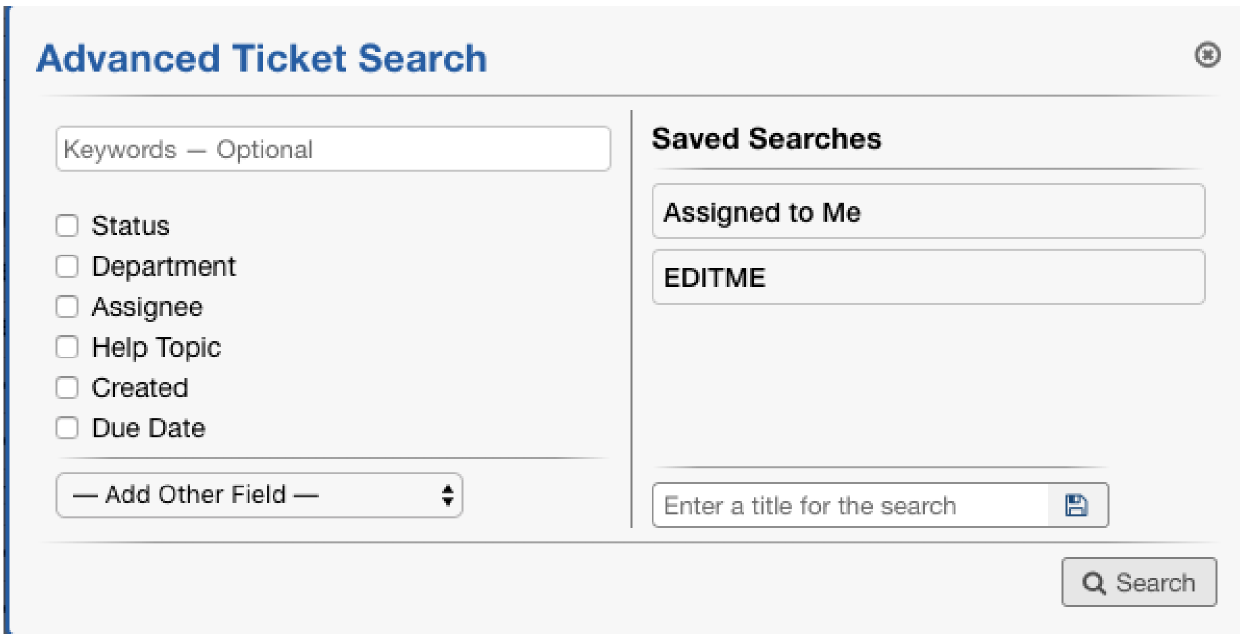
Third Party Collaborators can be added to Tasks by agents to receive updates on the tasks as posted by the Agents of the help desk. Collaborators will not have access to nor see the task when they login to the Client Portal; they will simply receive a New Activity Notice with the updates posted. If the Collaborator responds to the Notice, this will thread back into the task in the help desk.

10.4 Tickets Tab

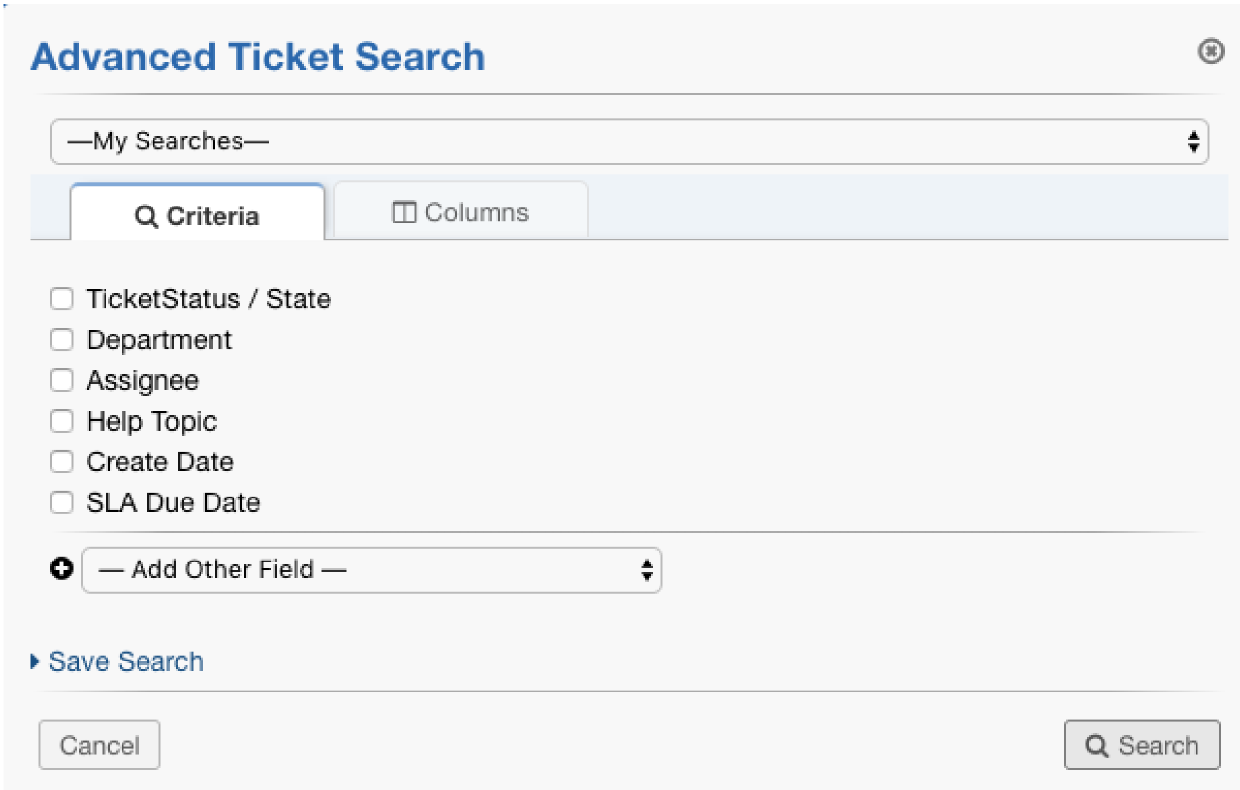
10.4.1 Advanced Search

Several improvements have been made to the Advanced Search to make it more user friendly and more efficient

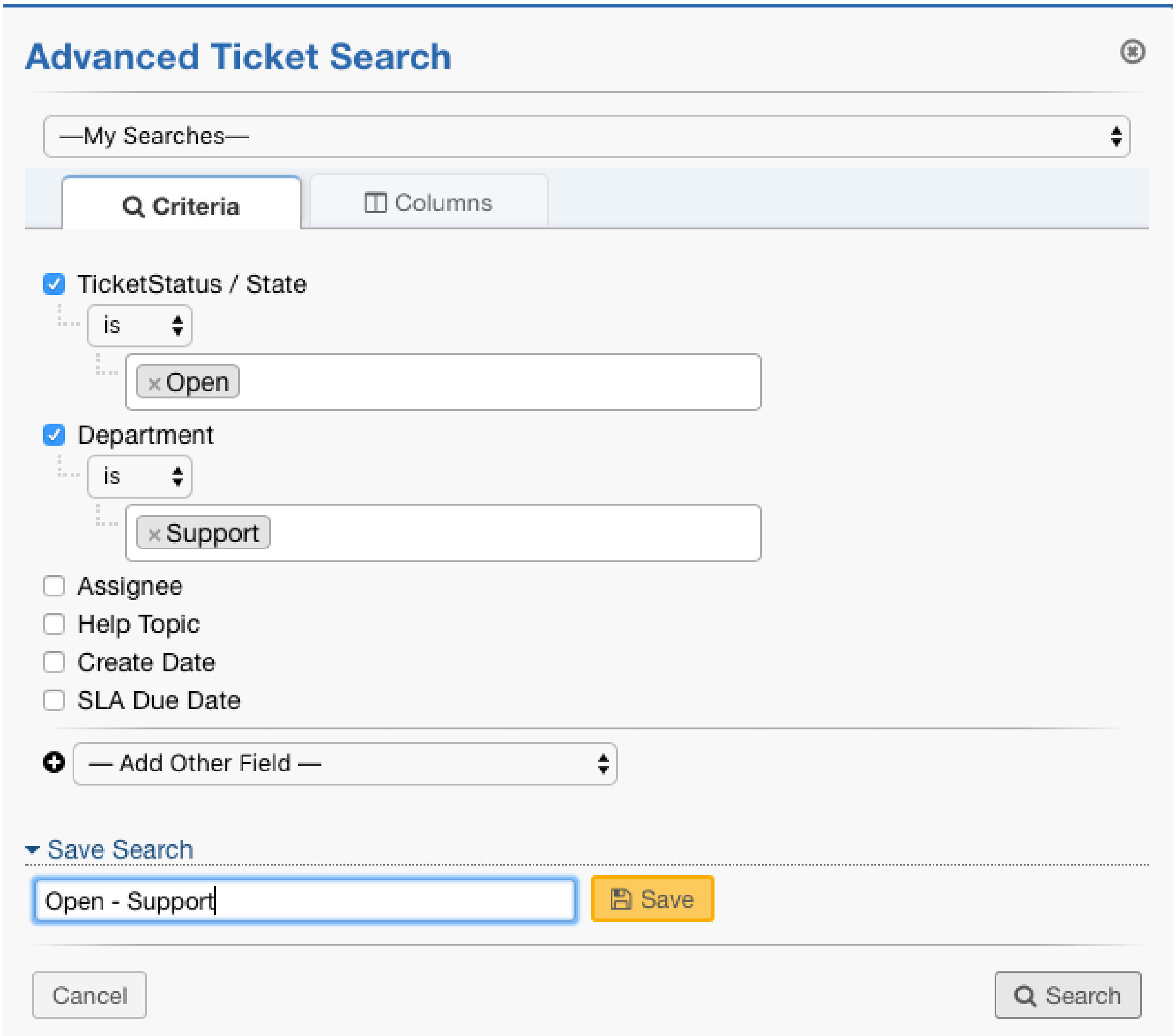
Old Advanced Search:



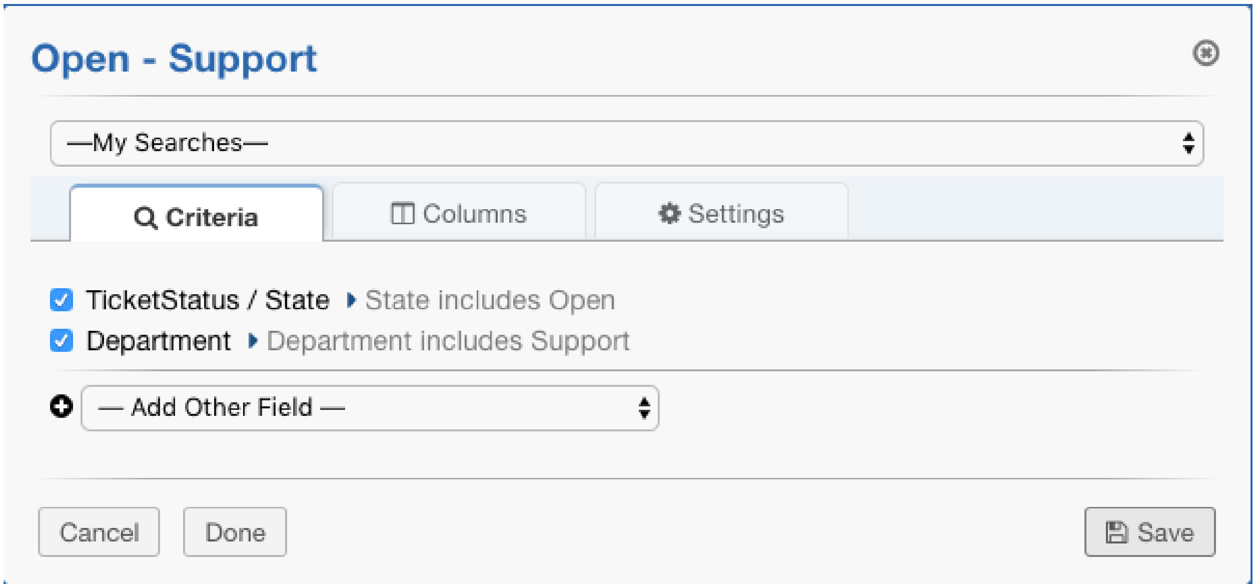
New Advanced Search:



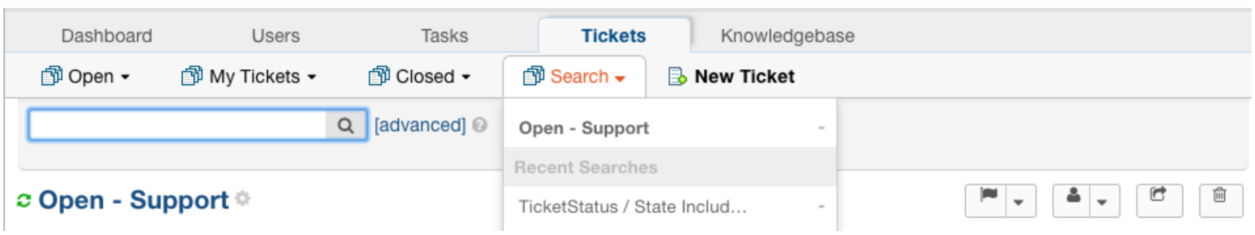
Saving a Search:


Advanced Ticket Search
—My Searches—
Criteria
Columns
TicketStatus / State
is
Open
Department
is
Support
Assignee
Help Topic
Create Date
SLA Due Date
— Add Other Field —
Save Search
Open - Support
Save
Cancel
Search

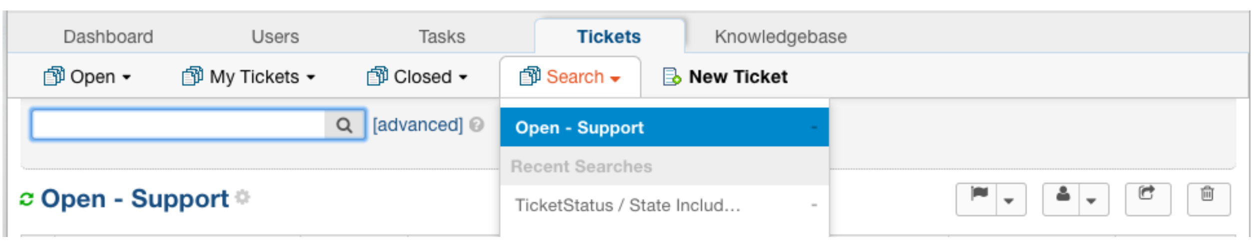
Once Saved:



Saved searches are now displayed in the Search column with the title specified:



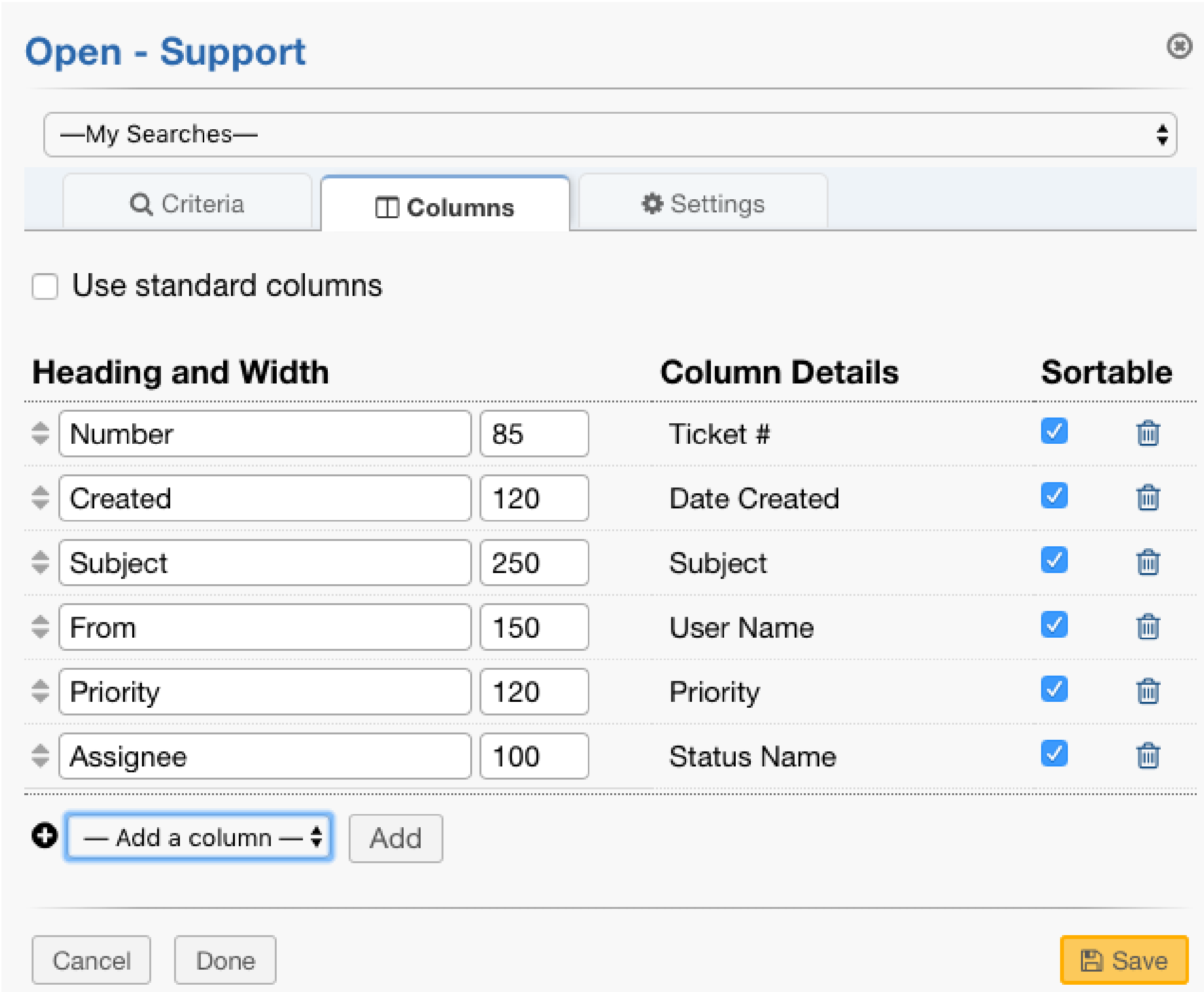
To edit a saved search, click the edit option beside the custom search:



Agents now have the option to customize the columns they see in a custom search as well as adding a quick filter to further narrow down the results shown.

Custom Columns:

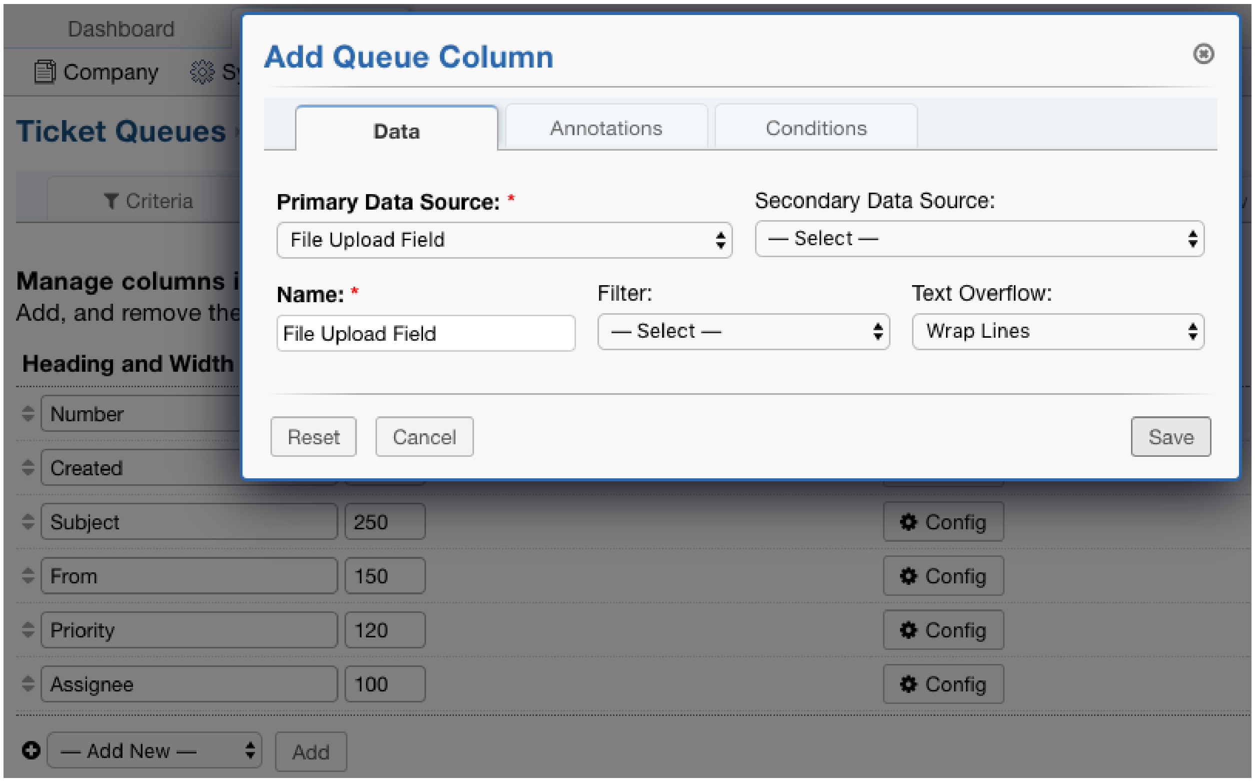
To customize columns, simply uncheck the 'Use standard columns' box:



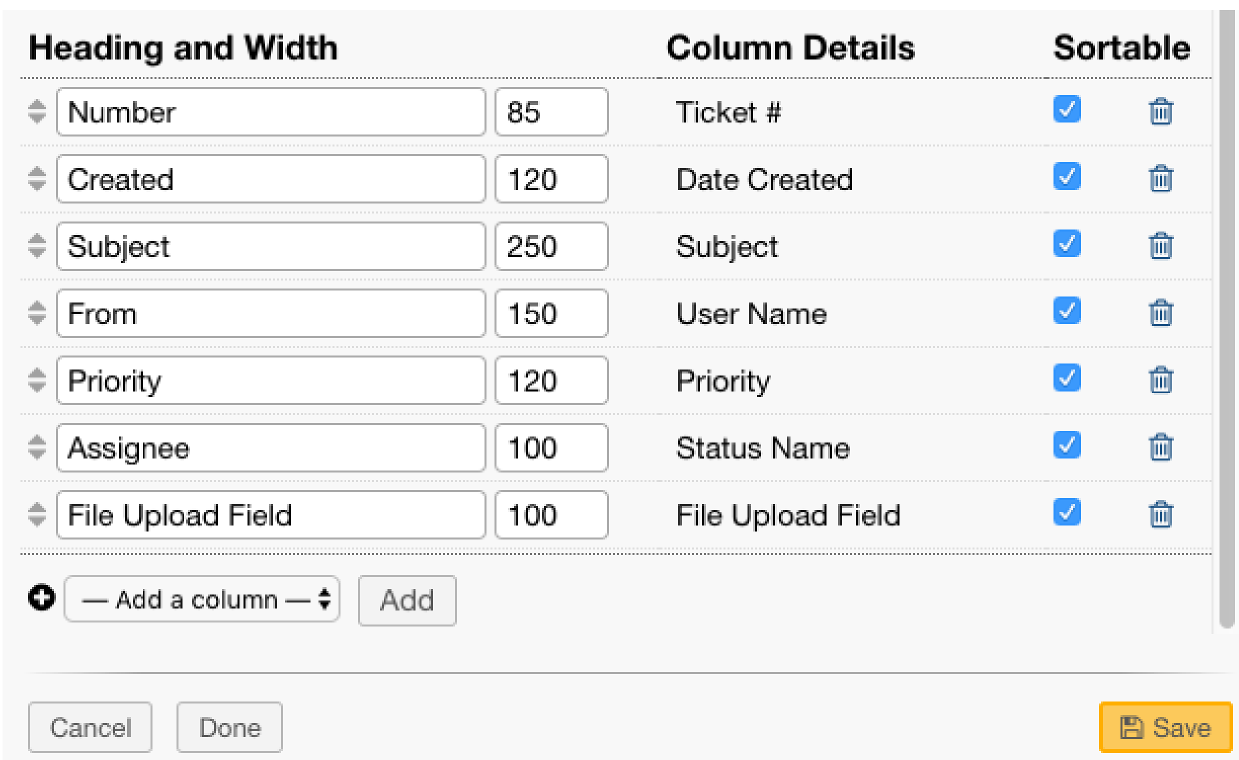
From here, agents can choose to customize headings for their columns, decide which fields should be sortable, and add/remove columns.

***Note:** The columns available to add to searches is configured by the Administrator for individual queues that are available to all Agents. The Administrator can add a field to the columns by going to a specific queue, clicking the Columns tab, and selecting the 'Add New' option to configure the new field.

Adding a custom field from Admin Panel:

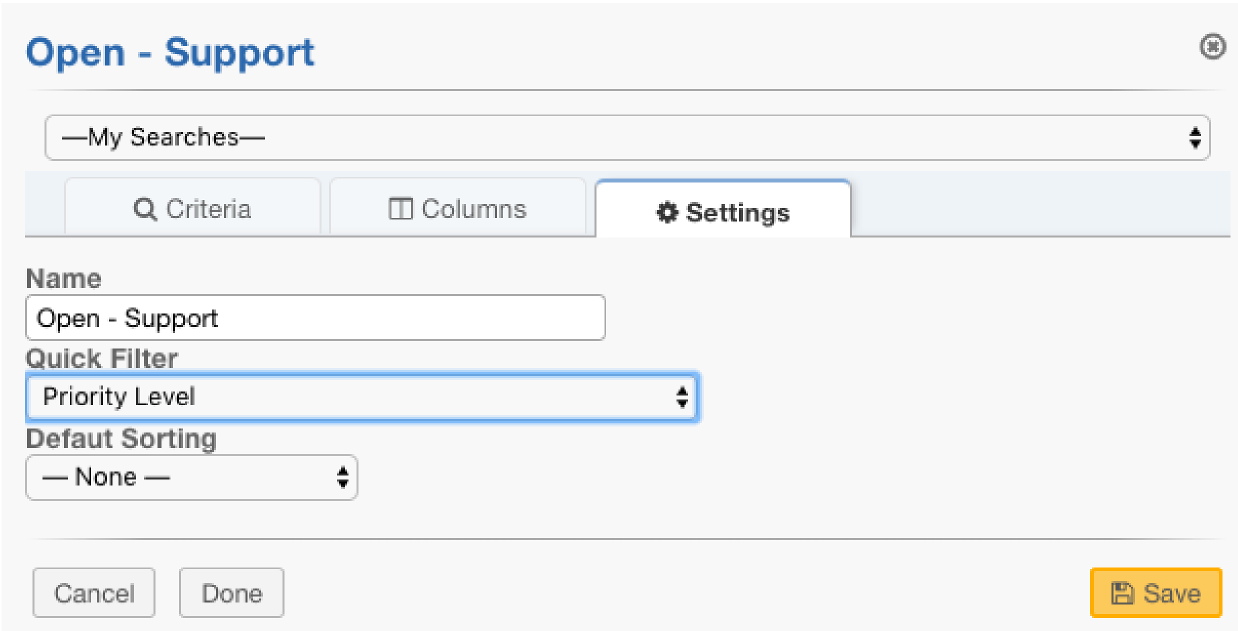


New Custom field in Saved Search columns:

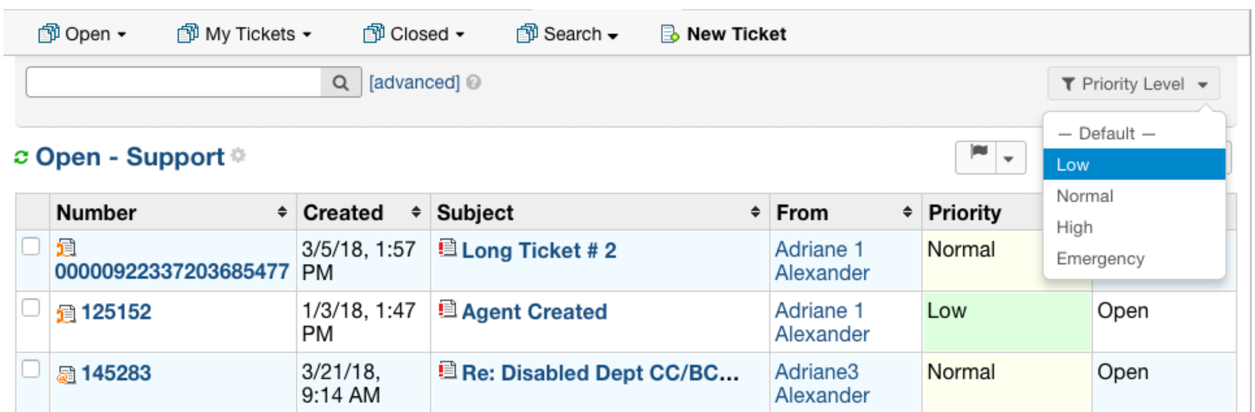


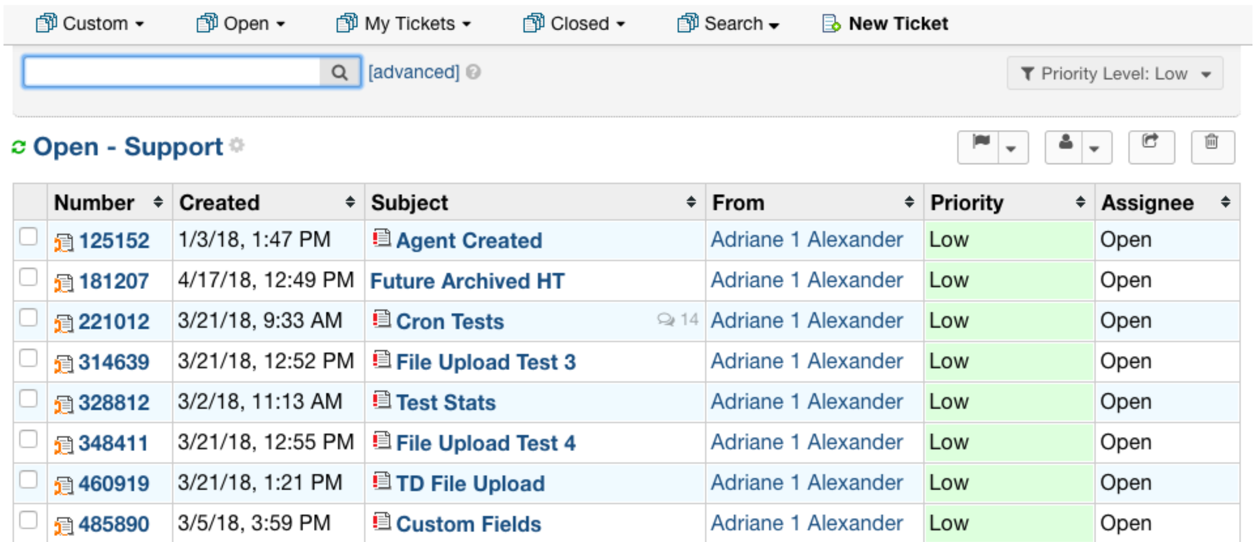
Quick Filters:

Quick Filters are added to searches using the Settings tab.



Once saved, the Agent can further filter tickets based on the new filter





Custom ▾ | Open ▾ | My Tickets ▾ | Closed ▾ | Search ▾ | New Ticket

[advanced] | Priority Level: Low

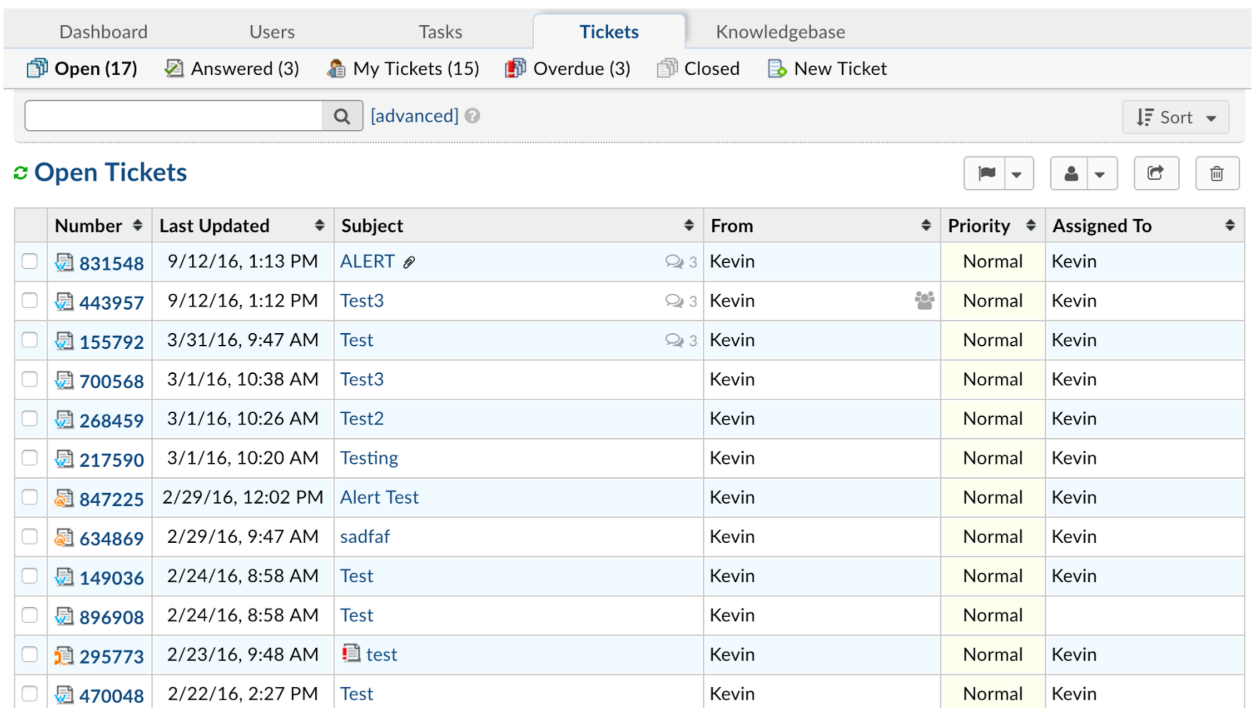
Open - Support

Number	Created	Subject	From	Priority	Assignee
125152	1/3/18, 1:47 PM	Agent Created	Adriane 1 Alexander	Low	Open
181207	4/17/18, 12:49 PM	Future Archived HT	Adriane 1 Alexander	Low	Open
221012	3/21/18, 9:33 AM	Cron Tests 14	Adriane 1 Alexander	Low	Open
314639	3/21/18, 12:52 PM	File Upload Test 3	Adriane 1 Alexander	Low	Open
328812	3/2/18, 11:13 AM	Test Stats	Adriane 1 Alexander	Low	Open
348411	3/21/18, 12:55 PM	File Upload Test 4	Adriane 1 Alexander	Low	Open
460919	3/21/18, 1:21 PM	TD File Upload	Adriane 1 Alexander	Low	Open
485890	3/5/18, 3:59 PM	Custom Fields	Adriane 1 Alexander	Low	Open

10.4.2 Tickets

Agent Panel > Tickets

When an agent logs in to the help desk, they will be automatically routed to the Open Ticket Queue.



Dashboard | Users | Tasks | Tickets | Knowledgebase

Open (17) | Answered (3) | My Tickets (15) | Overdue (3) | Closed | New Ticket

[advanced] | Sort

Open Tickets

Number	Last Updated	Subject	From	Priority	Assigned To
831548	9/12/16, 1:13 PM	ALERT 3	Kevin	Normal	Kevin
443957	9/12/16, 1:12 PM	Test3 3	Kevin	Normal	Kevin
155792	3/31/16, 9:47 AM	Test 3	Kevin	Normal	Kevin
700568	3/1/16, 10:38 AM	Test3	Kevin	Normal	Kevin
268459	3/1/16, 10:26 AM	Test2	Kevin	Normal	Kevin
217590	3/1/16, 10:20 AM	Testing	Kevin	Normal	Kevin
847225	2/29/16, 12:02 PM	Alert Test	Kevin	Normal	Kevin
634869	2/29/16, 9:47 AM	sadfaf	Kevin	Normal	Kevin
149036	2/24/16, 8:58 AM	Test	Kevin	Normal	Kevin
896908	2/24/16, 8:58 AM	Test	Kevin	Normal	
295773	2/23/16, 9:48 AM	test	Kevin	Normal	Kevin
470048	2/22/16, 2:27 PM	Test	Kevin	Normal	Kevin

These are tickets the Agent has access to based on their Department and Group assignments as well as tickets that are assigned directly to them or a team they are included.

Tickets are sorted first by the Priority Level and second by the Date- which is the date of last update. Each column of the queue is sortable but the default will return to the Priority/Date sorting each time they log-in.

There are 5 Queues along the sub-tab including:

Open: these are tickets Open in the Help Desk including both New Tickets and tickets that the end user is the last respondent on. These will have a BOLD ticket number to give the visual

Answered: These are tickets that have been responded to by Agents and are awaiting response back from the ticket owner. This queue can be collapsed into the Open ticket queue. Tickets that have been answered will not have a bold ticket number to visually represent the last action was by the Agent.

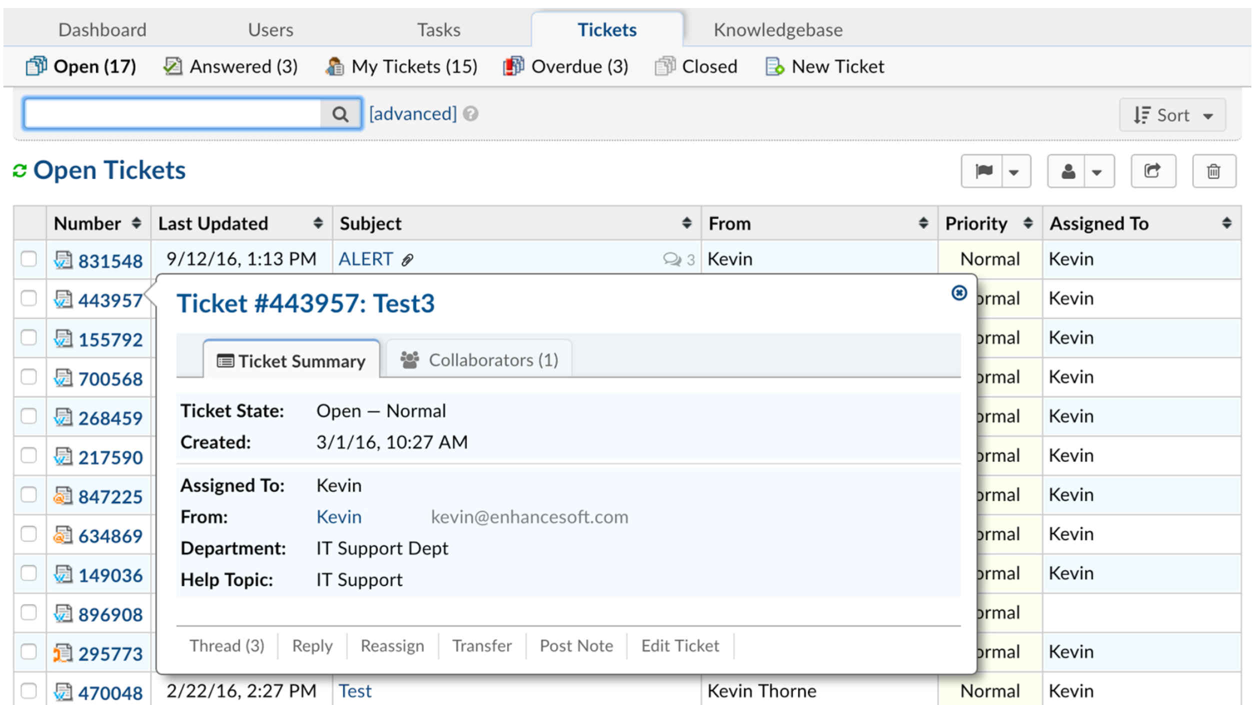
My Tickets: These are ticket that are assigned directly to the Agent or a team the Agent is assigned.

Overdue: These tickets have exceeded the assigned SLA Plan or Due Date assigned to the ticket. SLA Plans can be determined by the Department, Help Topic or Ticket Filter configuration. Due Dates are manually assigned to tickets when an Agent creates a ticket from the client portal or when they edit an existing ticket.

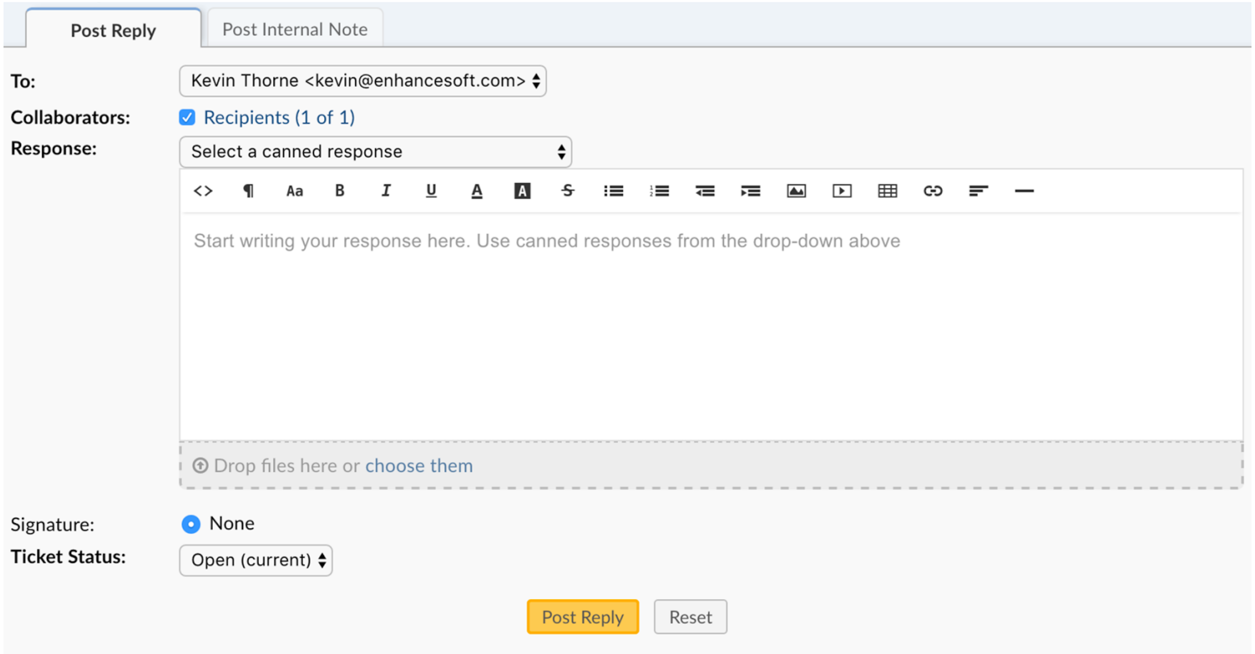
Closed: Tickets in this queue have been marked closed by the Agent either upon response to the end user or from the quick button of the ticket queue. Tickets that are marked closed can be reopened on response by the end user.

Tickets in these queues are not unique to each queue meaning that there may be some overlaps- For example, a ticket can be Answered and Overdue at the same time and therefore, will appear in both ticket queues.

Agents can preview the metadata of the ticket by hovering over the ticket number. A pop-up box will appear allowing the Agent access to actions along the bottom of the pop-up as well as access to the collaborators of the ticket.

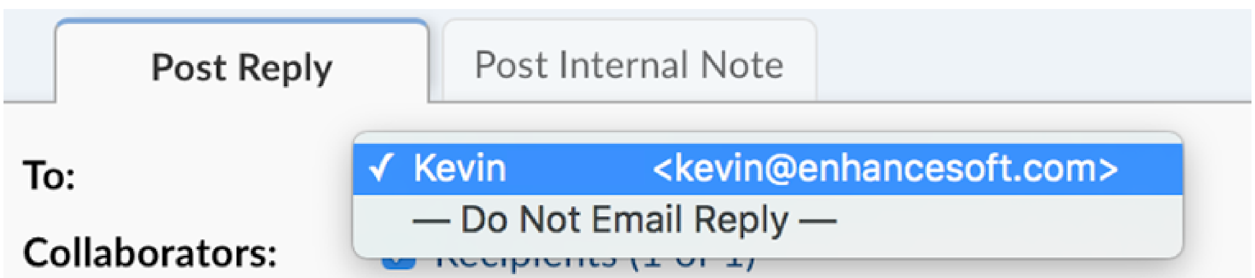


Agents can open up the ticket by clicking on the Ticket Number or the Subject of the ticket. When an agent opens the ticket, the default will be to direct them to the Reply box at the bottom of the ticket.



Based on their Role permissions, Agents can reply back to the end user by typing their response into the box- including adding attachments, links and embedding YouTube videos. Agents can select a canned response from the drop down in the reply box even if typing some of the response. All canned responses can also be edited by the Agents in the reply box prior to being sent. Collaborators can be added here to have access to the ticket. If necessary, the status of the ticket can be changed from the drop down prior to posting the response.

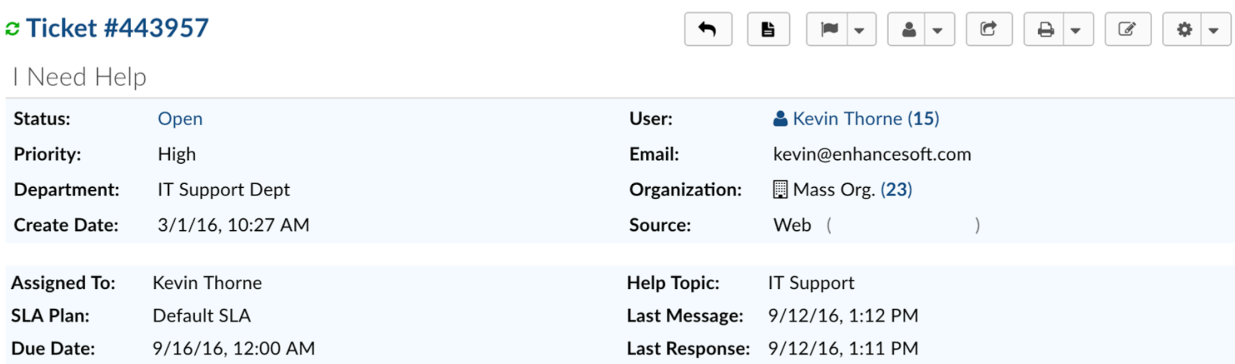
If a response is required yet the Agent does not want to send the response to the user but still post the response to the ticket thread, they can select the "Do Not Email Reply" from the drop down above the reply box for the user. This will also not send email replies to any collaborators on the ticket.



This response will be in the thread and visible to the ticket owner and any collaborators when they check the status of the ticket from the Client Portal of the help desk.

Ticket Header

From the top of the ticket or the Ticket Header, Agents will see any data associated with the ticket from the built in Ticket Details form as well as any custom form associated with the Help Topic.



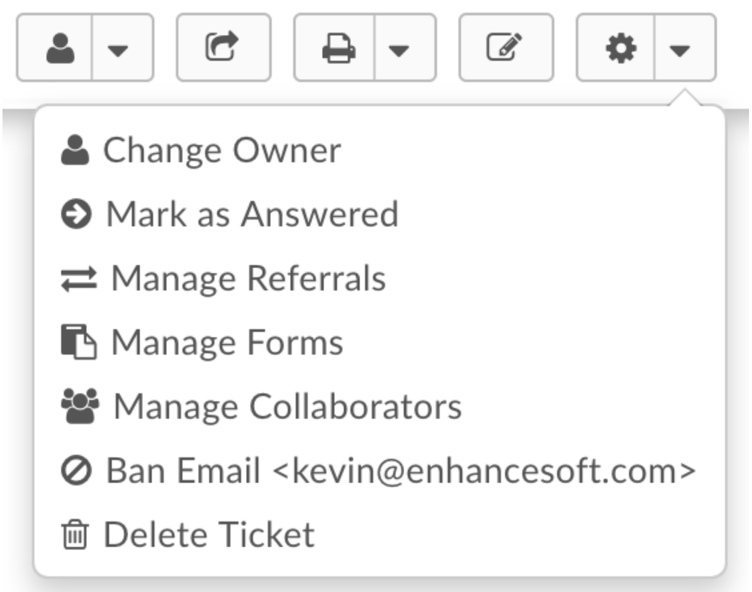
From the quick action buttons on the top right of the Ticket Header, Agents can perform a few different actions if granted these permissions in their assigned Group.

Print: Allows agents to print either the Ticket Thread or the Ticket Thread including any internal notes.

Edit: This action allows agents to edit the fields of the ticket- including any custom forms that are added to the ticket once it is created.

Change Status: Agents can change the status of the ticket with no response required. If changed, a pop up box will appear allowing agents to include notes with the status change.

More: Depending on the Agent's Role permissions, they can see these functions.



Change Owner: this allows the Agent to change the owner of the ticket. If the owner is changed, the previous owner will no longer have access to the ticket.

Mark as Answered/Unanswered: This allows the Agent to mark the ticket as Answered or Unanswered (depending on it's current state). The Agent has to have the Post Reply permission for the Ticket's Department in order to utilize this feature. When marking a ticket as Answered/Unanswered the Agent gets a popup to optionally put a reason why they marked it as such. If a reason is provided it will be added as an Internal Note with the title `Ticket Marked (Un)Answered` (depending on what it was marked as). Regardless of if they put a reason or not the system will always put a SYSTEM Note saying the ticket was flagged as (Un)Answered by the Agent along with a timestamp.

Manage Forms: This will allow the agent to attach any Custom Forms of the help desk to the ticket. Fields of the form can be edited once added by clicking on the "Edit" quick button. The fields of the form will not show up on the ticket header until there is information in the fields. If enabled, either the Agent or the ticket owner can edit the fields of the added forms.

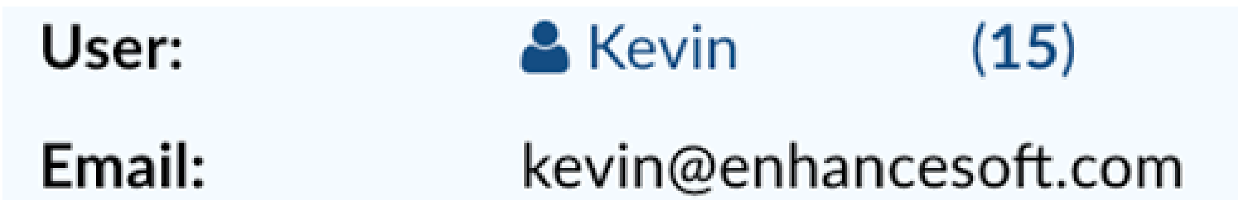
Forms currently on the ticket can be removed from the Manage Form quick button. Any data in the form fields will also be deleted.

Ban Email: A email address can be ban from created tickets in the help desk by added them to the ban list. This action can be undone by the help desk administrator if necessary. Banning an email address will not delete tickets of that user; this action will have to be done separately if necessary.

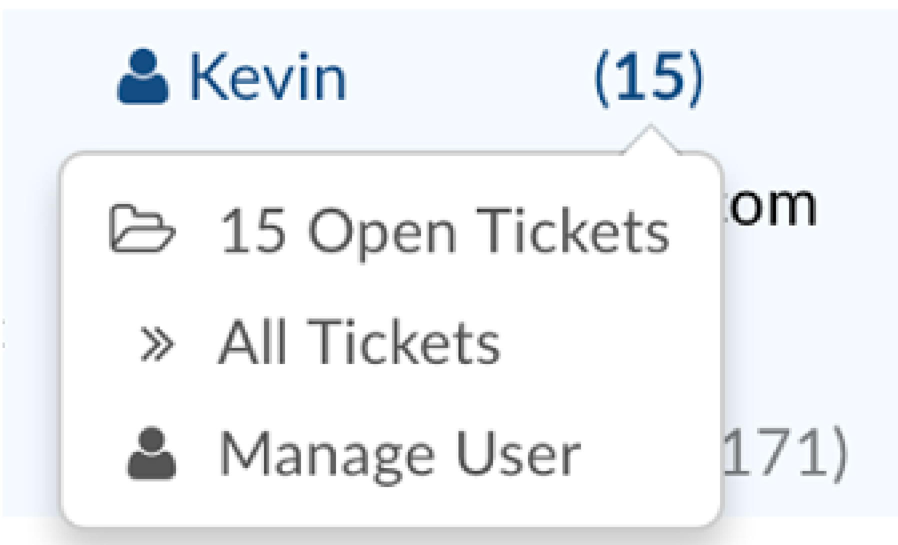
Delete Ticket: When selected, a pop-up box will appear allowing the agent to give an optional reason for deletion. Once a ticket is deleted, it is not recoverable! If the agent types a reason in the pop-up box, that note will appear in the System Logs for the Administrator.

User Information on the Ticket Header

Information about the ticket owner can also be edited from the ticket header.



The number in parenthesis next to the User's name is the number of tickets they currently have in your help desk. If you click on the number - this will allow the agent a few options:

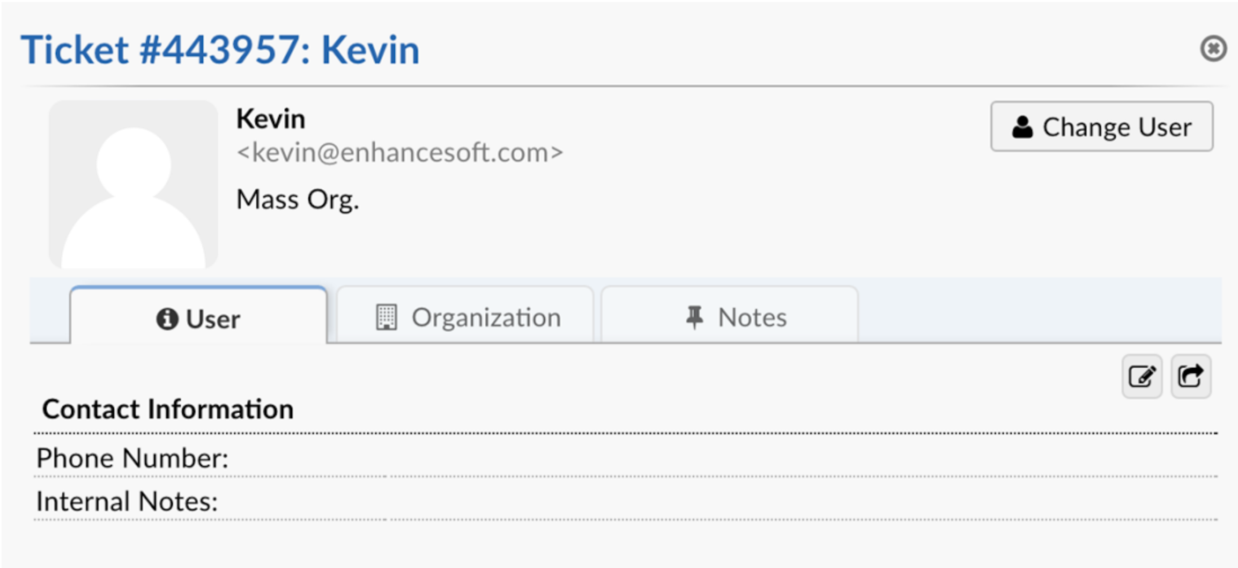


They will be able to view tickets of this user that are either Open or Closed in the help desk or the option of viewing both by clicking All Tickets.

If they click "Manage User" this will redirect them to the User's profile in the User Directory. Same for if they click "Manage Organization"

If you click on the user's name a pop up box will appear allowing you to edit their information as well as change the ticket owner of this ticket.

Any actions taken on the User or Collaborators as well as with in the ticket will be noted as an internal note in the Ticket Thread.

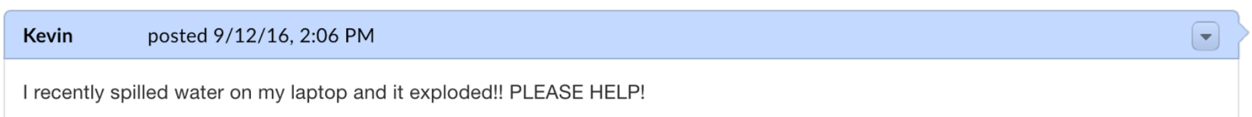


To edit the fields of the Contact Information form for the user, click on the icon that is the pencil in the box located in the middle right of the pop-up box.

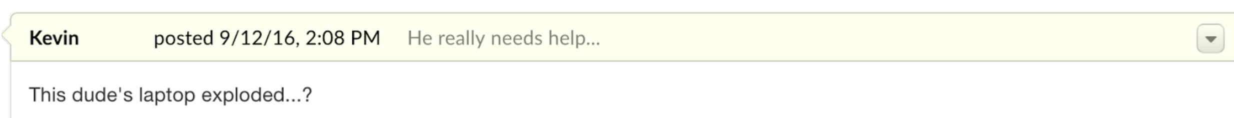
Ticket Thread

Each message of the ticket thread is color coded to give the agents a visual representation of what the thread entry is and/or who performed the action.

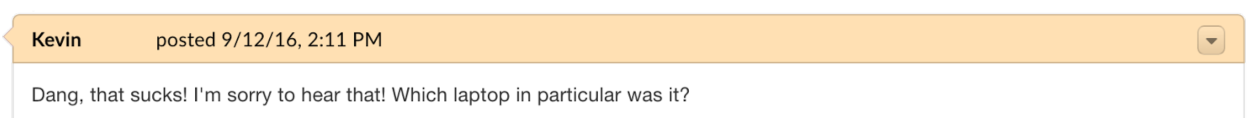
Replies from the Ticket Owner or a Collaborator will appear with a Blue banner in the Ticket Thread:



Internal notes will appear with a light Yellow banner. They will also contain any actions taken within the Ticket (transfer, assignment, etc)



Agent's response back to the Ticket Owner or Collaborator will appear with an Orange Banner:

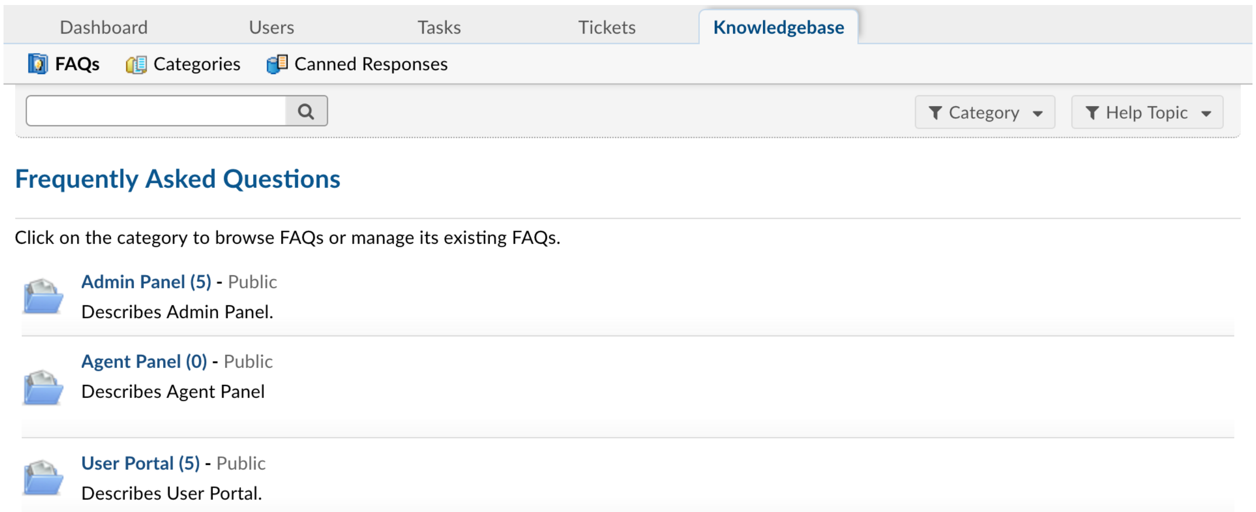


Any items in the Ticket Thread that are with the Blue or Orange banner are also visible to the Ticket Owner as well as any collaborators on the ticket when they check the ticket status from the Client Portal of the help desk.

10.5 Knowledgebase Tab

10.5.1 Knowledgebase

Agent Panel > Knowledgebase



Add Canned Response

To create a canned response for quick answers to common questions or a specific phrasing of a response for agents, go to Agent Panel > Knowledgebase > Canned Response.

Canned responses can be open to all departments or limited to only one department. (The department availability is determined by the department the ticket is assigned to, not the agent.) Simply choose the department from the drop down above the text area when creating the canned response.

Also available with canned responses is the availability of the HTML/Rich Text toolbar. This enables the addition of pictures, graphs and links to the response. Emphasis can be placed on specific words or phrases with the tool bar.

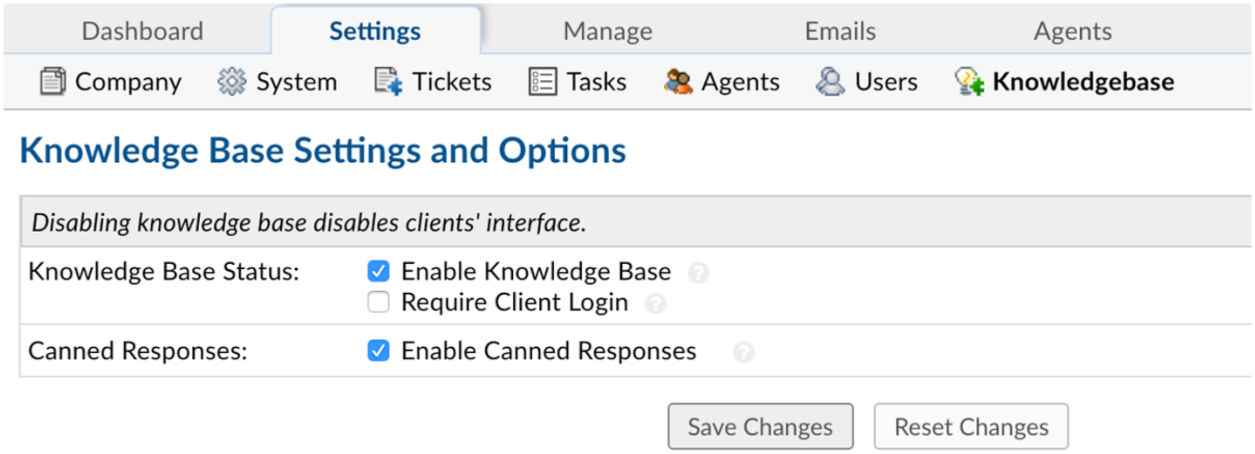
Variables can be added to the body of the responses to allow the data of the correlating fields to be pulled automatically in place of the variable. If there is no information in the field, the space will be left blank where the variable is located.

Attachments can also be added to Canned Responses which will attach to the response/ticket when populated. Attachments can be removed prior to sending the response if necessary.

Add FAQ to Category of the Knowledge Base

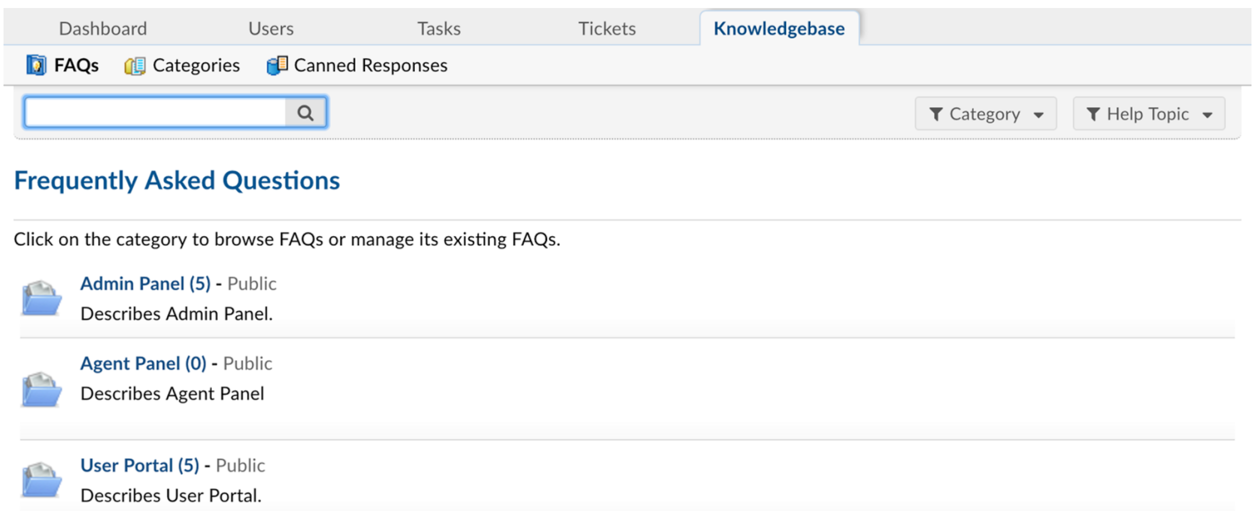
An unlimited number of FAQ's can be added to the Knowledge Base. These FAQs can be marked as private if it is for internal view only or public if it is to be visible on the Client Portal of the help desk. Please note, if it is to be visible for public use, both the Category and the FAQ must be marked Public.

First, the Knowledge Base will need to be enabled for the client interface by going to Admin Panel > Settings > Knowledgebase.

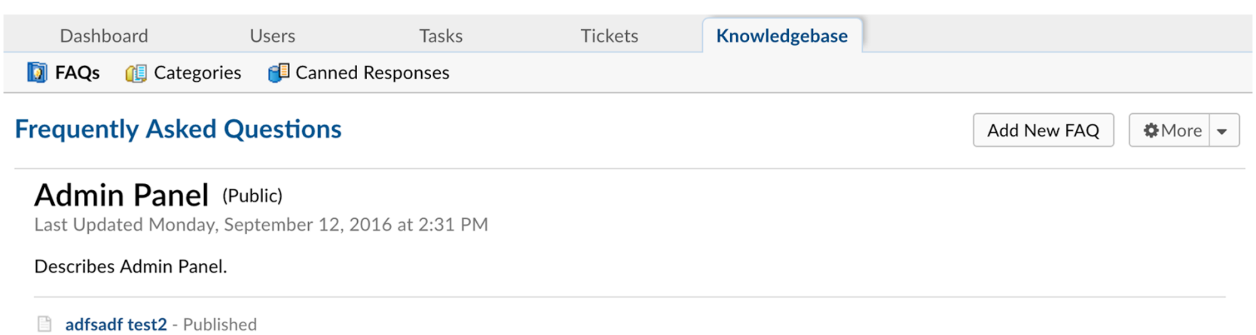


Once enabled, the Knowledge Base can be built by agents in the Agent Panel > Knowledge Base. To built the knowledge base, the agent will have to first, Add a Category and then add Frequently Asked Questions to the Category.

To add FAQ's to the Category, the agent will need to click on the Category name on the FAQ tab:



Then click on Add a New FAQ:

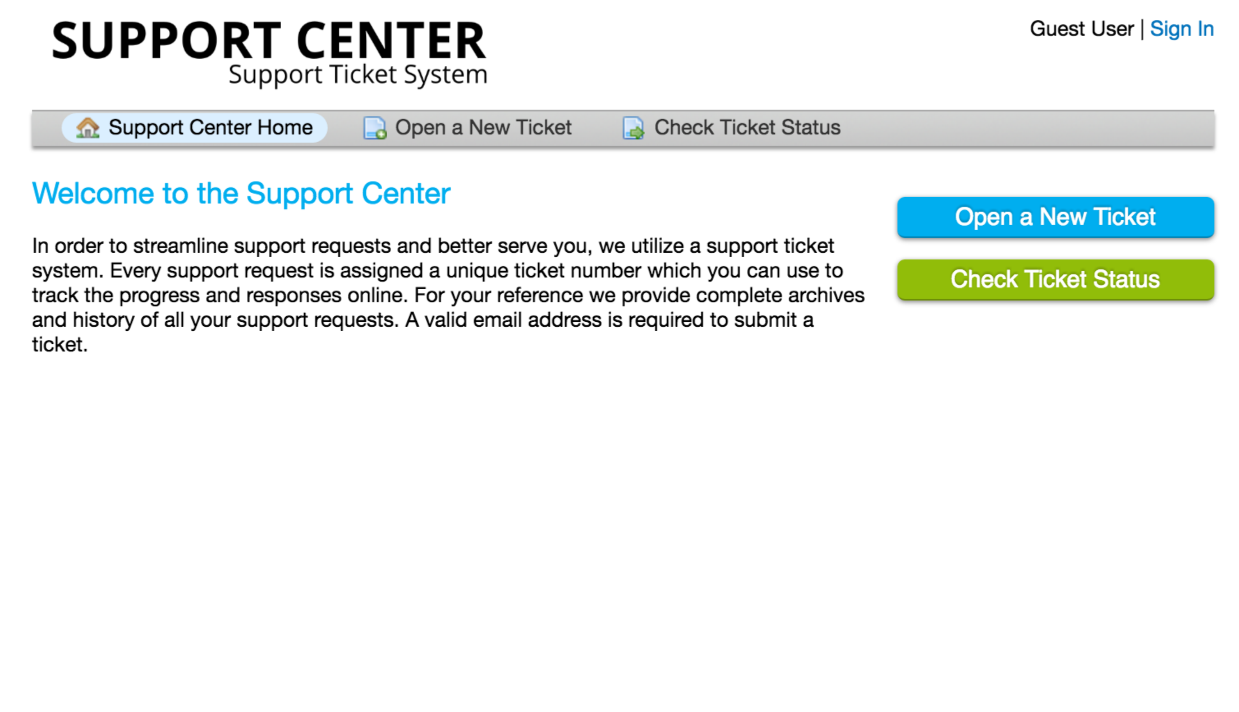


FAQs can have attachments, HTML/RIch Text and also be associated with specific Help Topics of the Help Desk. This is useful when the clients are searching through the Knowledge Base from the Client Portal; they can select the Help Topic and then only see the FAQs that have been associated with that topic.

CHAPTER 11

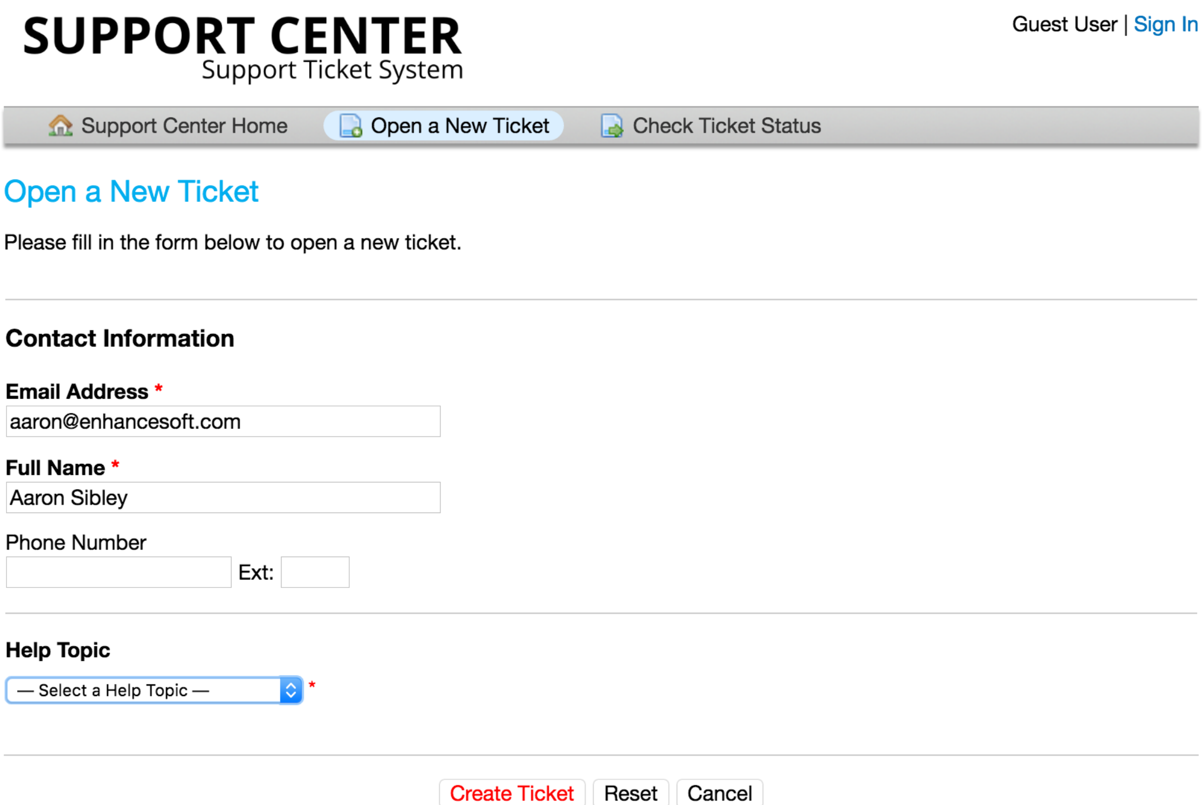
User Portal

11.1 Open A Ticket

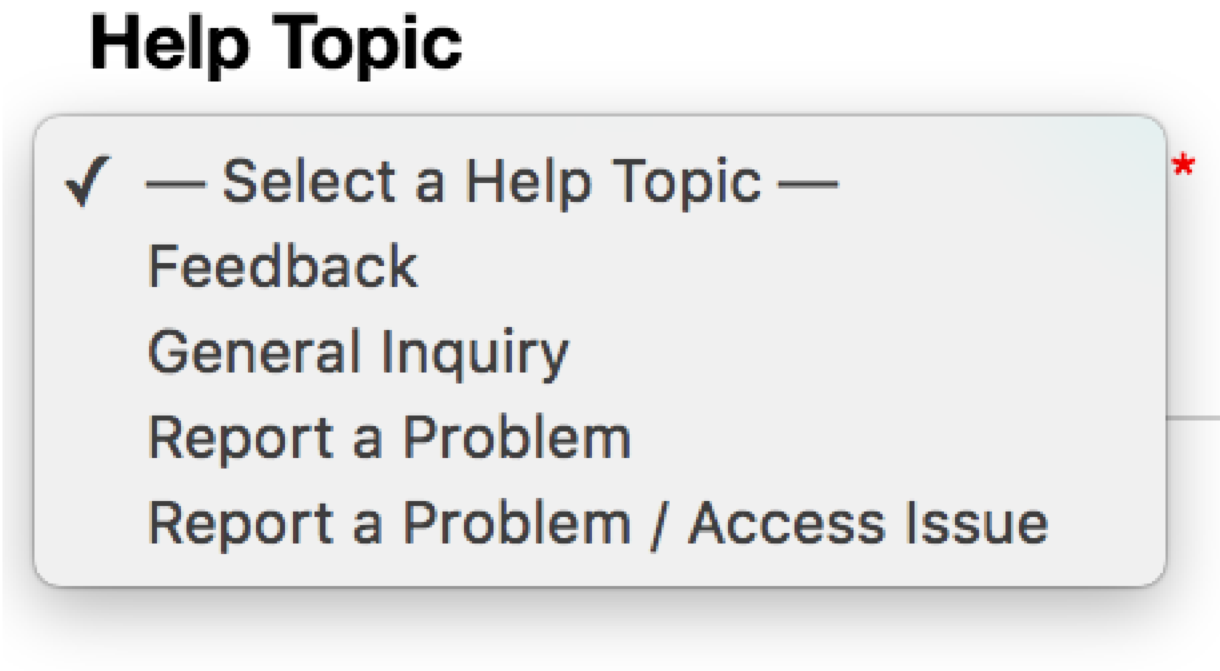


To open a new ticket, you will need to visit the client portal page of the help desk. Once you have arrived at that page, click on one of the two "Open a New Ticket" buttons.

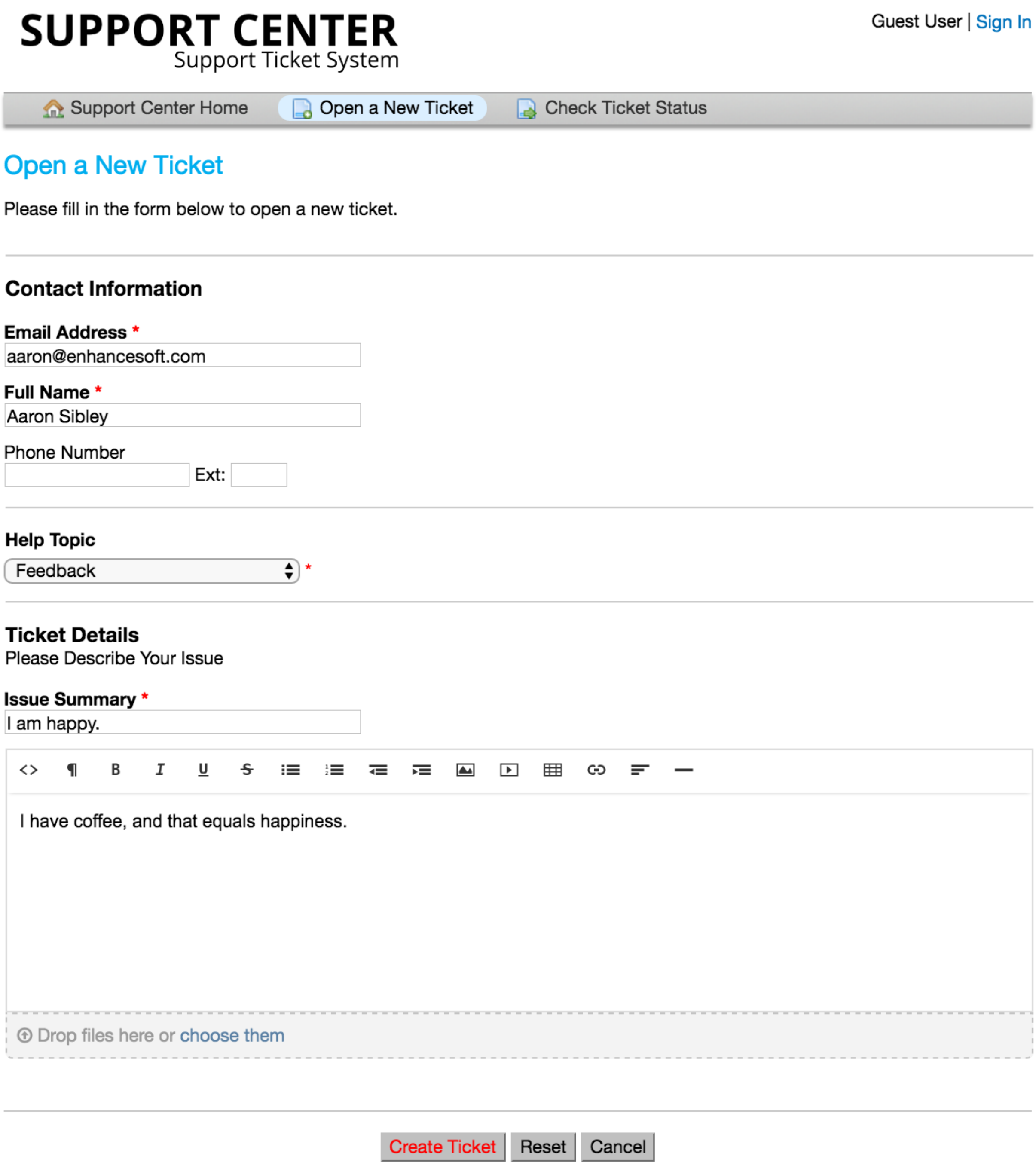
When you click the button, you will be redirected to a blank ticket form, where you can share the required contact detail fields for the ticket, i.e., email address, the name of the ticket owner, phone number, etc.



In addition, you will see a Help Topics field. By choosing a help topic, you are able to direct and streamline the information you are submitting to the help desk.

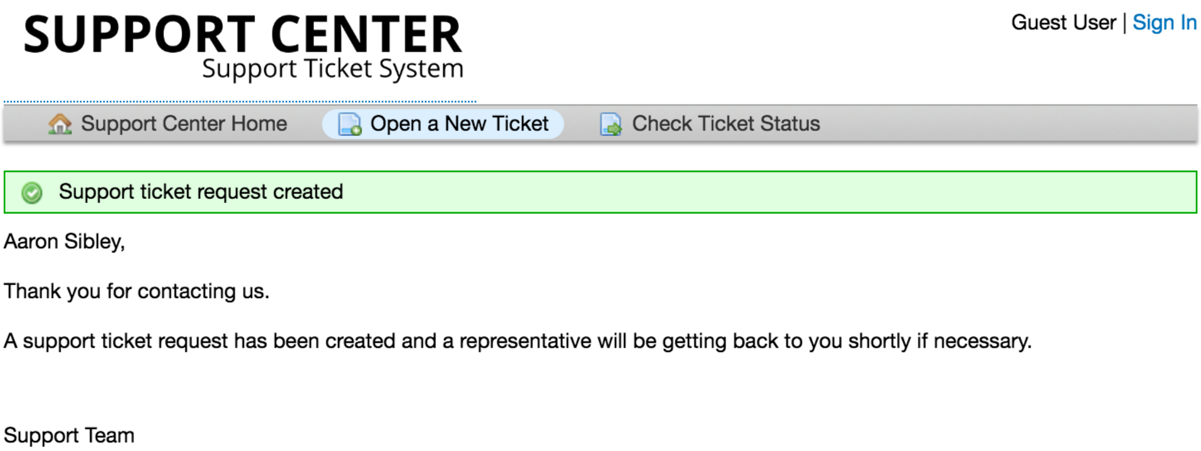


(Please note that the help desk you are contacting may have a much more thorough and unlimited population of help topics than what you see here.)



Select the appropriate help topic relating to the issue that you are experiencing. Make a brief description in the issue summary - think of this like the subject line of an email. Share as much detail as you would like in the body of the message. Use the HTML Rich Text toolbar to format your message, upload and share photos and videos, and attach hyperlinks. When you have completed filling out your ticket, be sure to click the "Create Ticket" button.

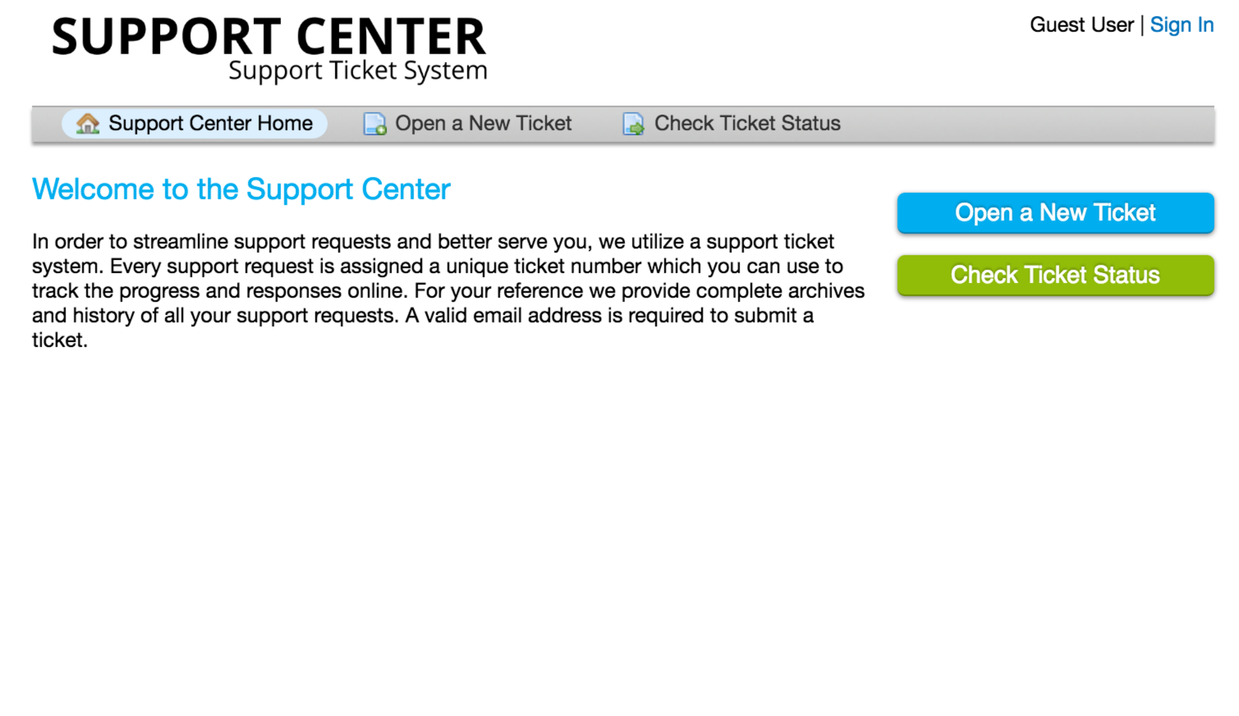
Once you have successfully created the ticket, you will be directed to a confirmation of the ticket request being created.



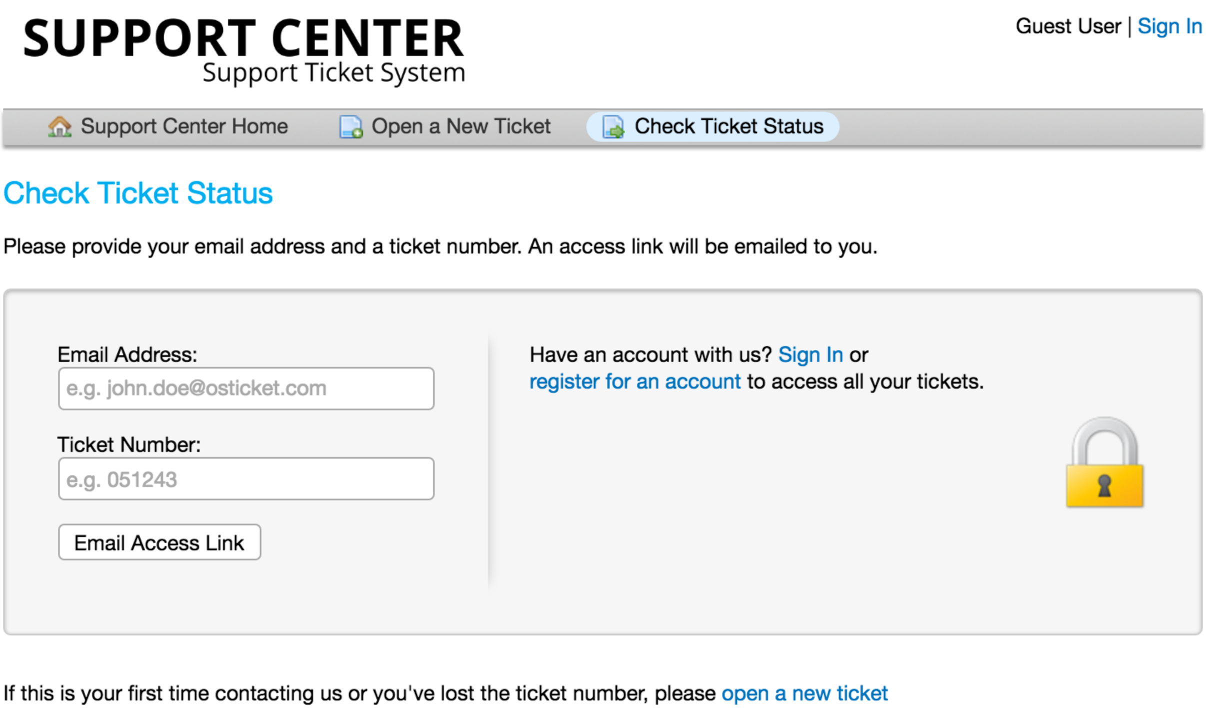
11.2 Check Ticket Status

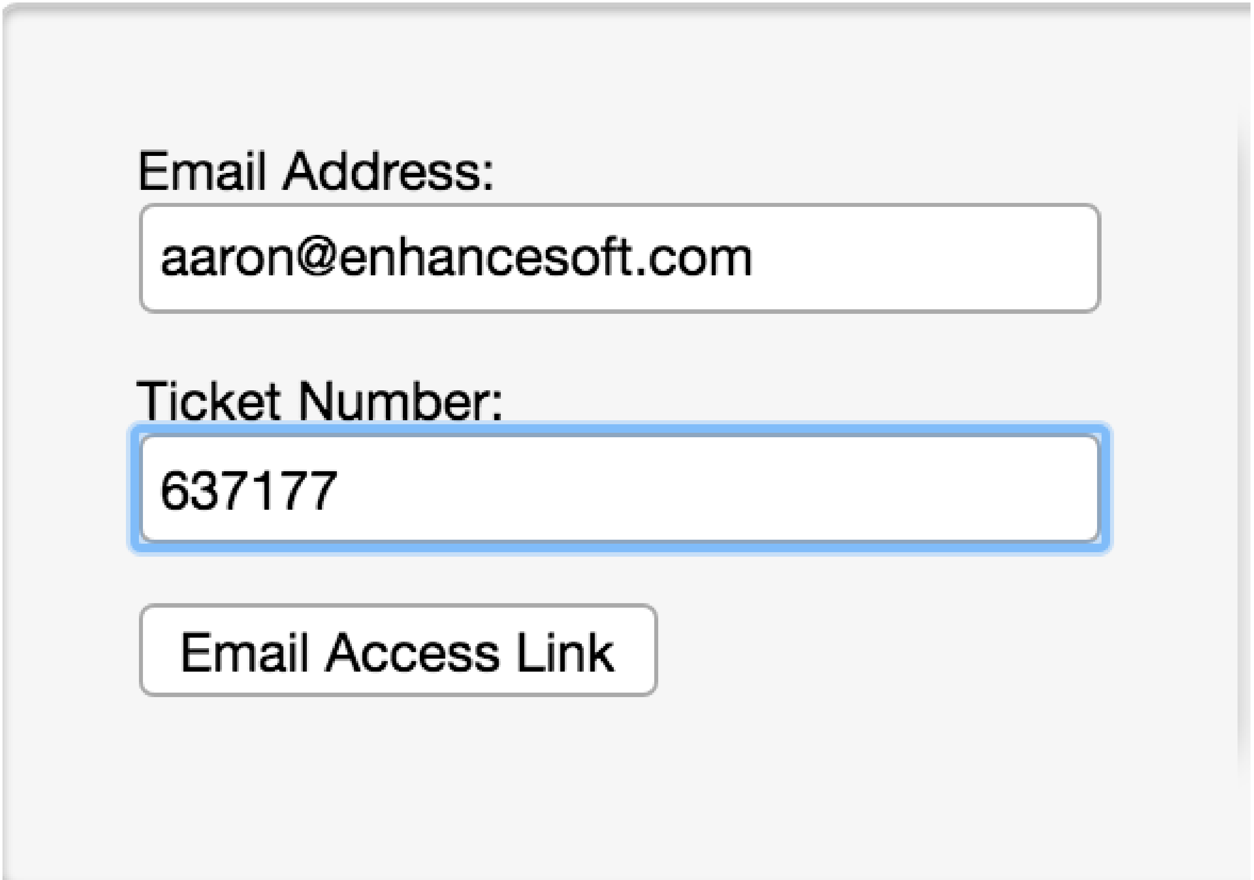
11.2.1 Using Email Address & Ticket Number

To check a ticket status, visit the main page of the help desk just as when you opened the ticket. You will select one of the two "Check Ticket Status" buttons.

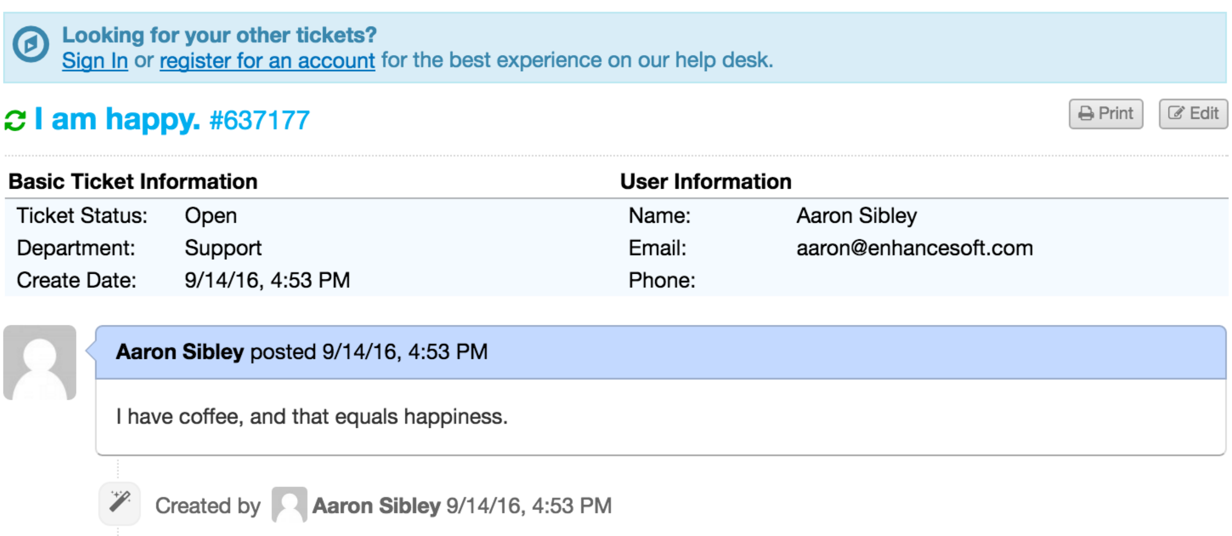


You will be redirected to the check ticket status page where you can access the ticket status information.


SUPPORT CENTER
Support Ticket System
Guest User | Sign In
Support Center Home
Open a New Ticket
Check Ticket Status
Check Ticket Status
Please provide your email address and a ticket number. An access link will be emailed to you.
Email Address:
e.g. john.doe@osticket.com
Ticket Number:
e.g. 051243
Email Access Link
Have an account with us? Sign In or
register for an account to access all your tickets.
If this is your first time contacting us or you've lost the ticket number, please open a new ticket

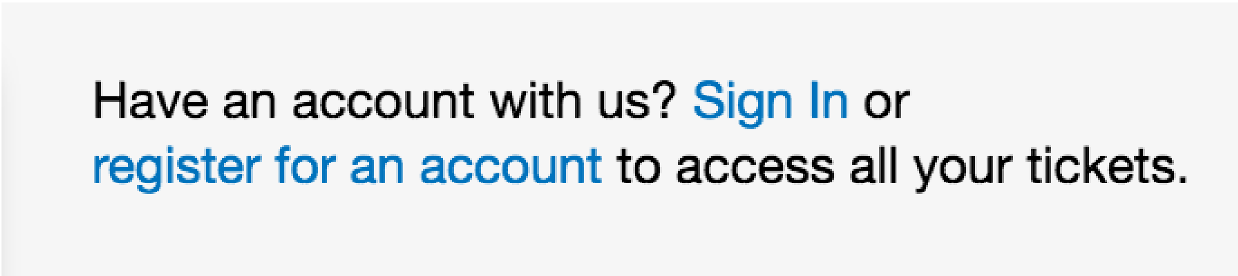


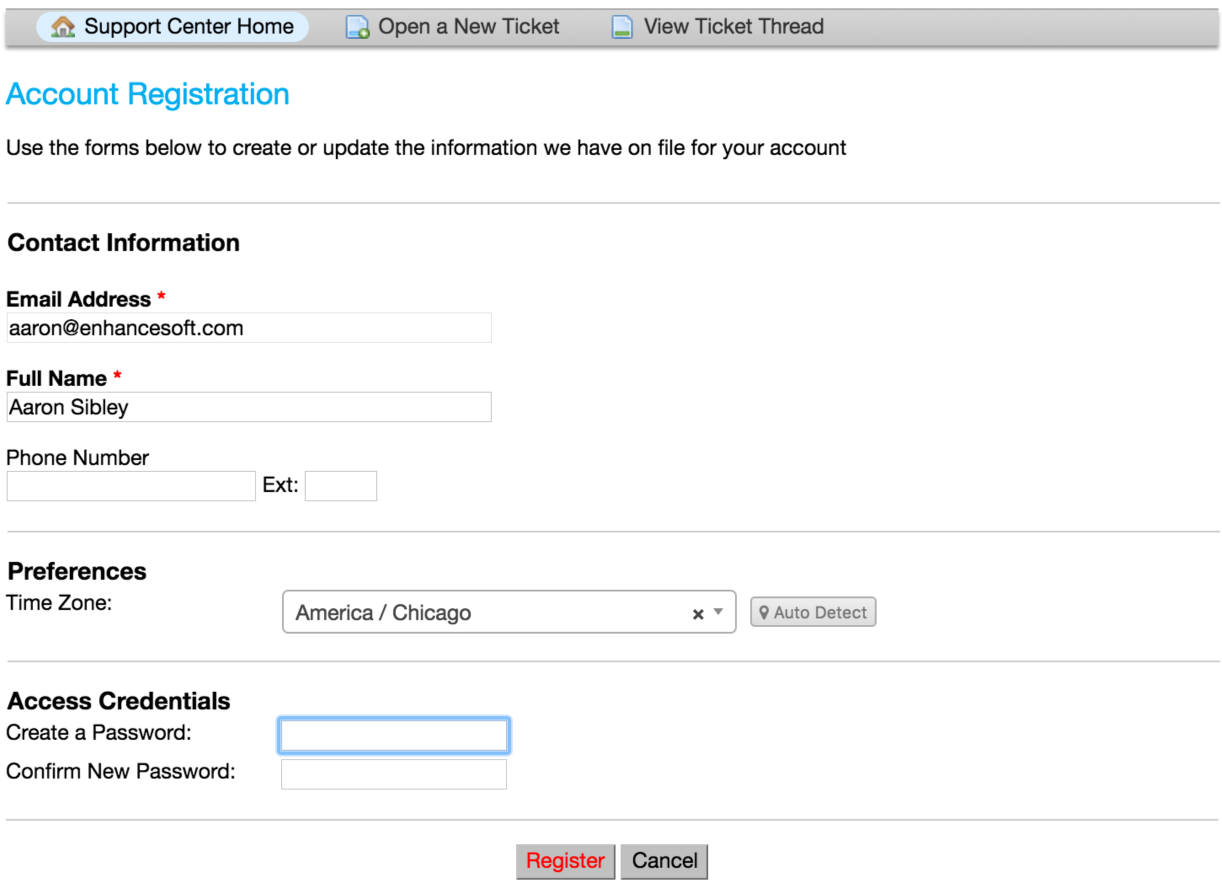
Once those details are provided, the email address associated with the user account will receive an access link to the ticket thread.



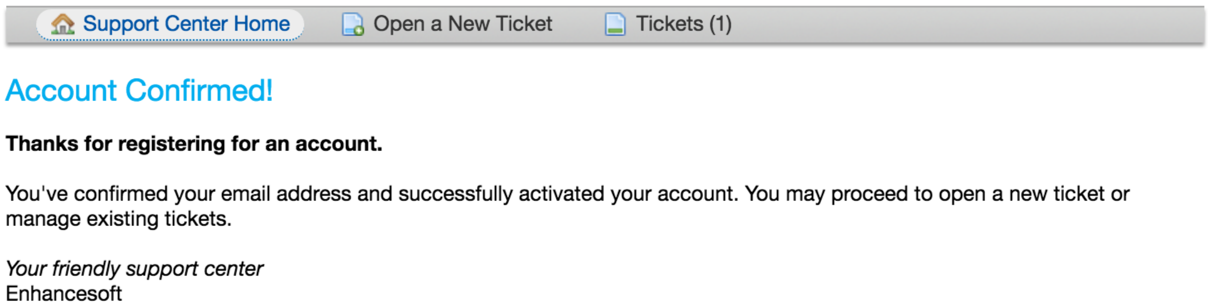
11.2.2 With User Account

Another way to check the status of a ticket is to log in directly to the system to access all of your tickets. In order to do this, you will need to create a user account by clicking on register for an account.

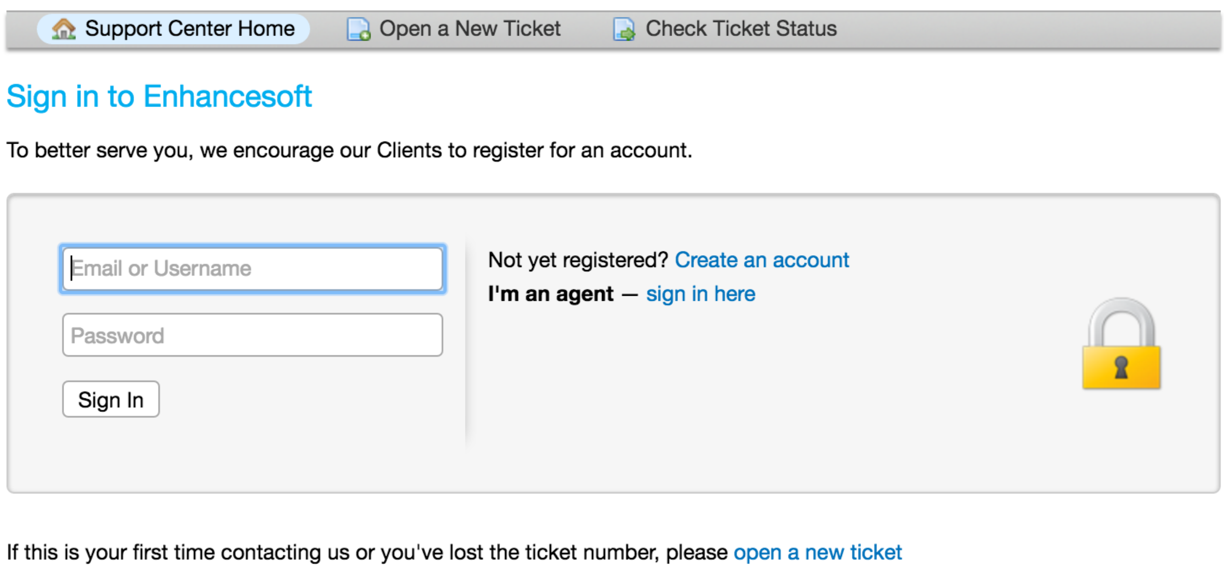




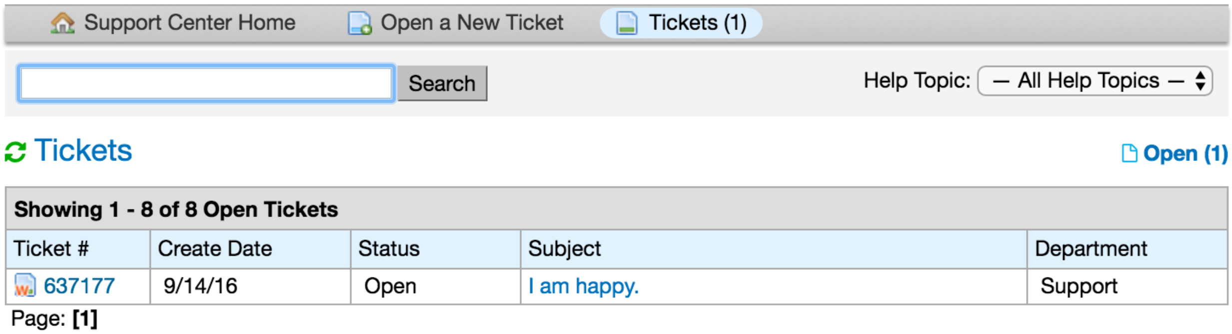
Once you have completed the registration process, you will need to follow the email link that you receive to confirm the account.



To login, simply visit the main portal for the help desk and enter the credentials that you registered with.

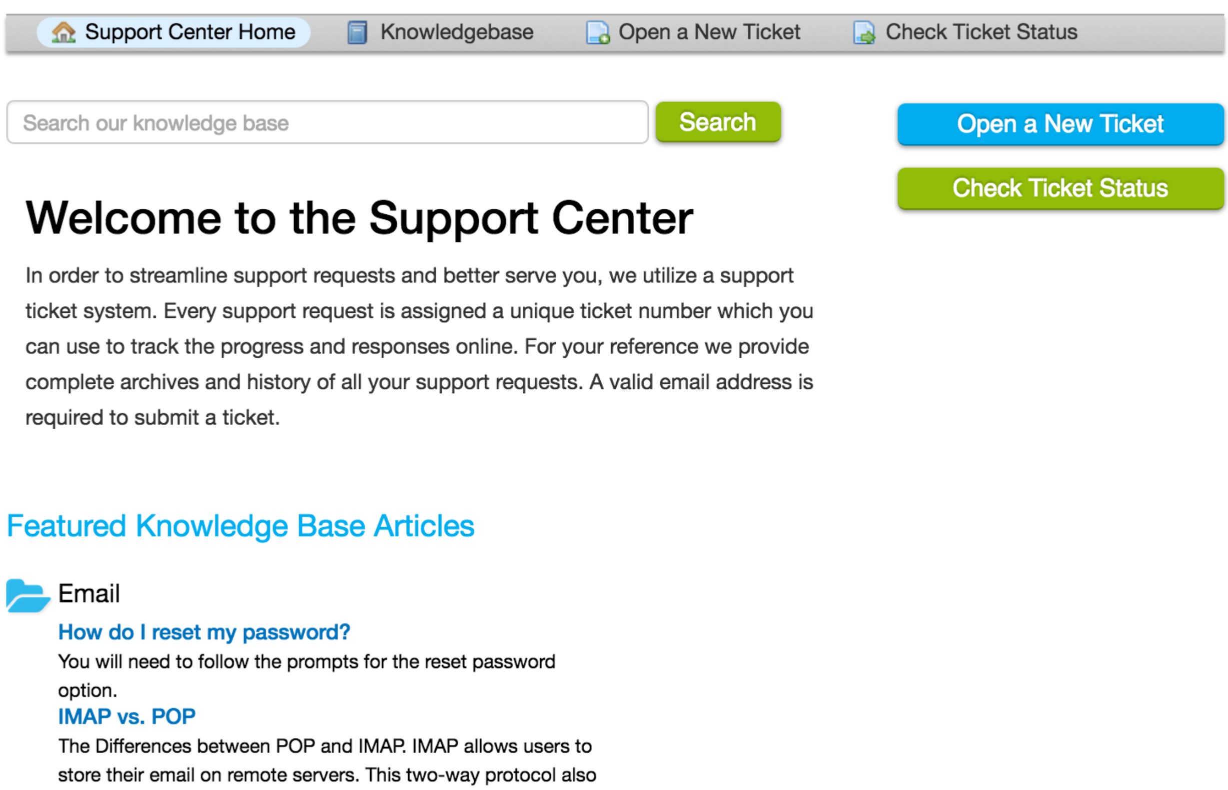


The benefit of creating a user account is that all tickets associated with your account will be listed in the ticket queue.



11.3 Knowledgebase

Knowledgebase articles are a convenient way for the support team to share information. By pre-populating articles with help topics relating to FAQ's, clients are able to help themselves with more common issues that arise to reduce wait time and make happy customers. Knowledgebase articles may be posted on the main page of the help desk or you may be required to login for access to them.



Knowledgebase articles can be located by following the article links at the bottom of the main page or by clicking on the “Knowledgebase” button at the top of the page.

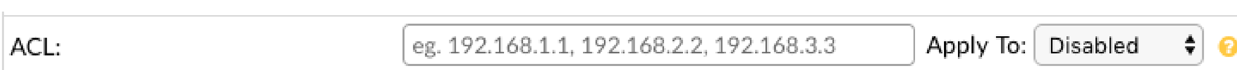
CHAPTER 12

ACL (Access Control List)

The Access Control List (ACL) feature allows you to enter a single IP address or a comma separated list of IP addresses to allow access to the system. Essentially, this means whatever IP address is in the ACL field will have access to the specified Panels of the software. If the field is left blank your helpdesk is open to the world. This feature is useful for those who wish to lock down their helpdesk to certain clients, to just their internal network or just to list of IP addresses.

12.1 ACL List

The ACL List is pretty straightforward as it's just a simple Textbox field in which you can insert a single IP address or a comma separated list of multiple IP addresses. For now, it only accepts the full IP address format of `xxx.xxx.xxx.xxx`. Eventually we plan to accept an IP range format, wildcard format, etc. but for now let's keep it basic. If you insert multiple IP addresses you have to use the Comma Separated List format of `xxx.xxx.xxx.xxx, yyy.yyy.yyy.yyy`.

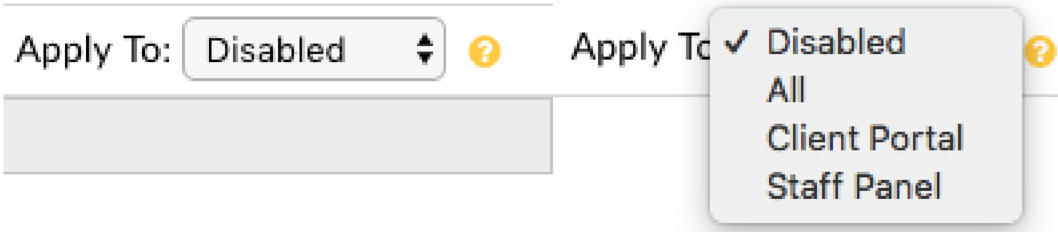


Note:

IPs cannot have a trailing comma otherwise a validation error will be thrown.

12.2 Apply To

After the ACL List is populated you can then choose an Apply To option. The Apply To option states which panel(s) the ACL will be applied to. There are four options in the Apply To dropdown that you can choose from. The first option is called "Disabled" which means the ACL feature will be Disabled. The second option is called "All" which means the ACL will be applied to all Panels in the helpdesk. The third option is called "Client Portal" which means the ACL will only be applied to the Client Portal. The last option is called "Staff Panel" which means the ACL will only be applied to the Staff/Admin Panel.



12.3 Example Usage

Let's go through an example together so we can see how this feature works. Let's say we want to lock down our helpdesk and we only want the following IPs to have access to the *entire* system (`192.168.100.100`, `192.168.100.101`, `192.168.100.102`). We would go to `Admin Panel > Settings > System` and scroll down to the **ACL** section. Now, since we have multiple IP addresses we have to use the comma separated list format. In the ACL List textbox we can enter the following `192.168.100.100, 192.168.100.101, 192.168.100.102`. Since we would like to lock down our *entire* helpdesk we can choose the `All` option in the Apply To dropdown. Once complete we can Save Changes and from then on only the specified IP addresses can access the helpdesk. Anyone else trying to visit the site will be denied with `Access Denied` error.

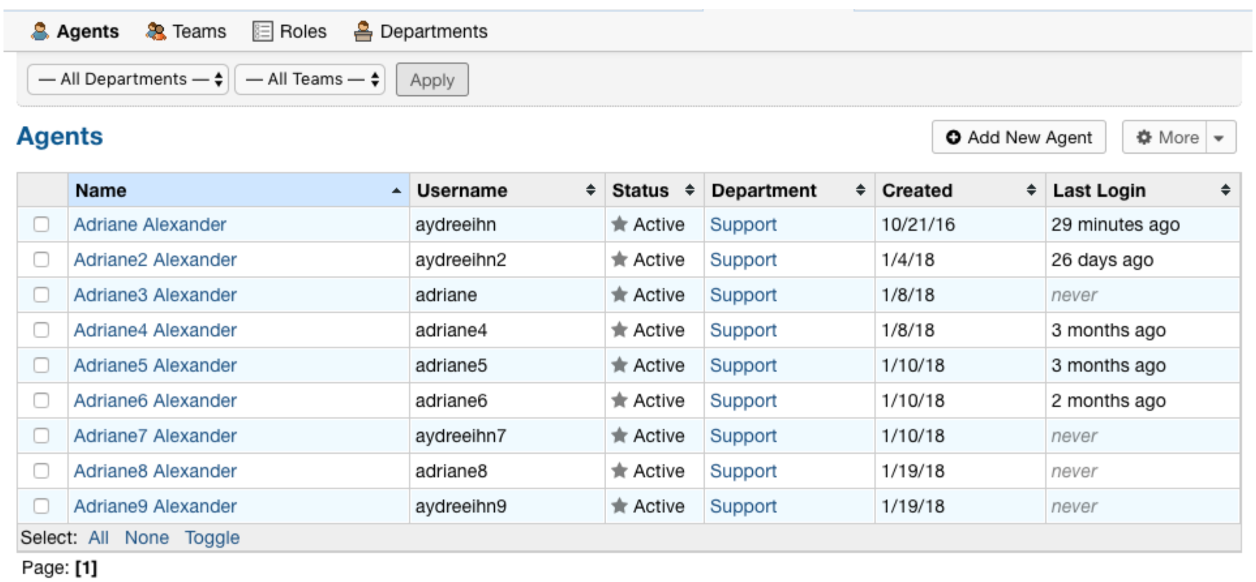
CHAPTER 13

Agent CSV Export

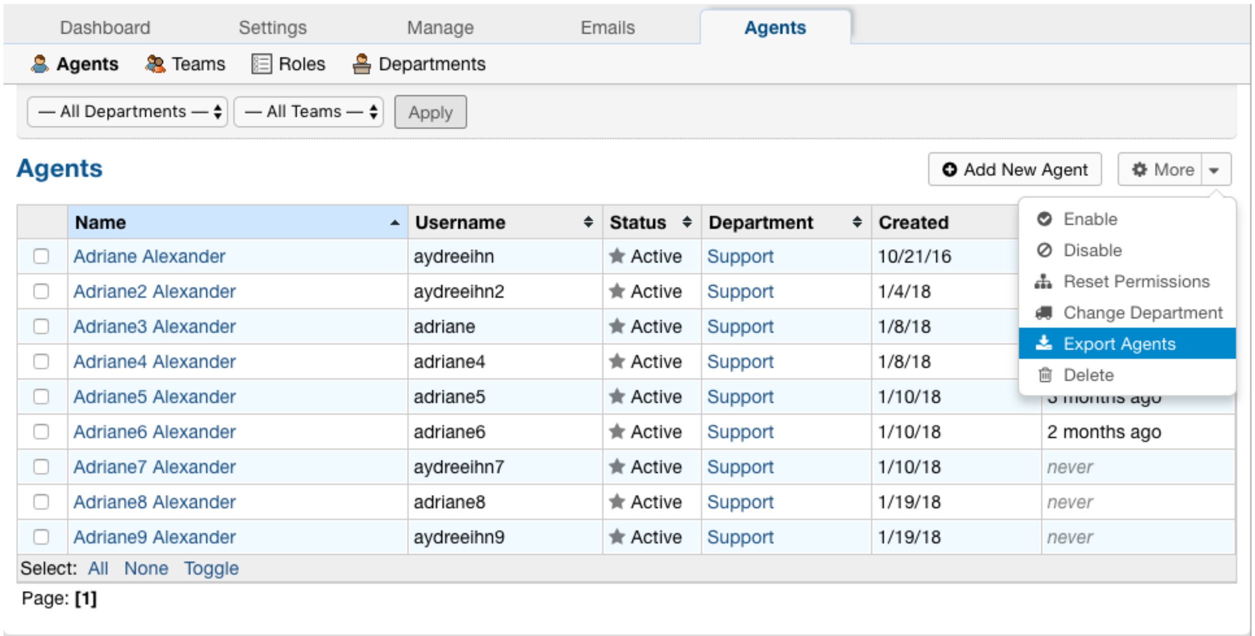
Admins are now able to download a CSV export that displays all Agents in the system as well as their access to each Department.

1. Go to:

Admin Panel | Agents Tab | Agents



2. Click the down arrow beside 'More' and choose the 'Export Agents' option.



13.1 CSV Output:

Name	Username	Status	Permissions	Primary Department	Disable Me	Maintenance	Sales	Support
Adriane Alexander	aydreeihn	Active	user.create,user.edit,user.d	Support	All Access	All Access	All Access	All Access
Adriane2 Alexander	aydreeihn2	Active	user.create,user.edit,user.d	Support		Expanded Access	View only	All Access
Adriane3 Alexander	adriane	Active	user.create,user.edit,user.d	Support				All Access
Adriane4 Alexander	adriane4	Active	user.create,user.edit,user.d	Support			Limited Access	All Access
Adriane5 Alexander	adriane5	Active	user.create,user.edit,user.d	Support				All Access
Adriane6 Alexander	adriane6	Active	user.create,user.edit,user.d	Support				All Access
Adriane7 Alexander	aydreeihn7	Active	user.create,user.edit,user.d	Support				All Access
Adriane8 Alexander	adriane8	Active	user.create,user.edit,user.d	Support		Expanded Access		All Access
Adriane9 Alexander	aydreeihn9	Active	user.create,user.edit,user.d	Support				All Access

The output shows each Agent, their Username, and their Status as well as the Permissions they have. Each additional column shows the Departments in the system as well as each Agent's role for that Department. If the Agent does not have access to a Department, the Role is left blank.

CHAPTER 14

Archiving Departments and Help Topics

Occasionally it could become necessary to no longer use certain Departments or Help Topics within a helpdesk. Even though they will no longer be used in the future, there could be some Tickets that are still assigned to the Department or Help Topic. In addition, there are important Dashboard Statistics already stored. To resolve these issues, Admins may now choose to Archive Departments or Help Topics.

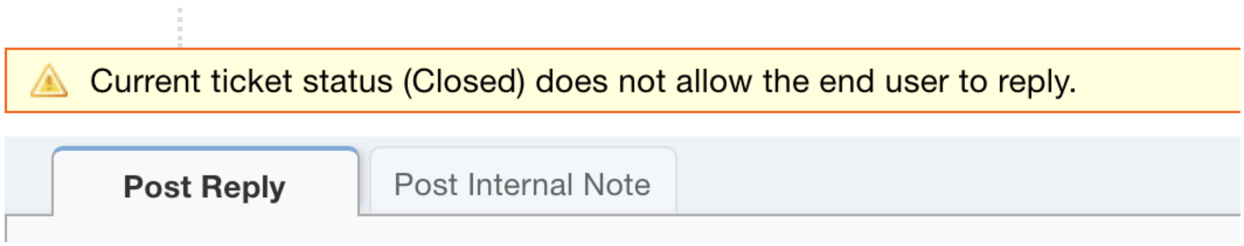
14.1 Departments:

Departments can have a status of Active, Archived, or Disabled.

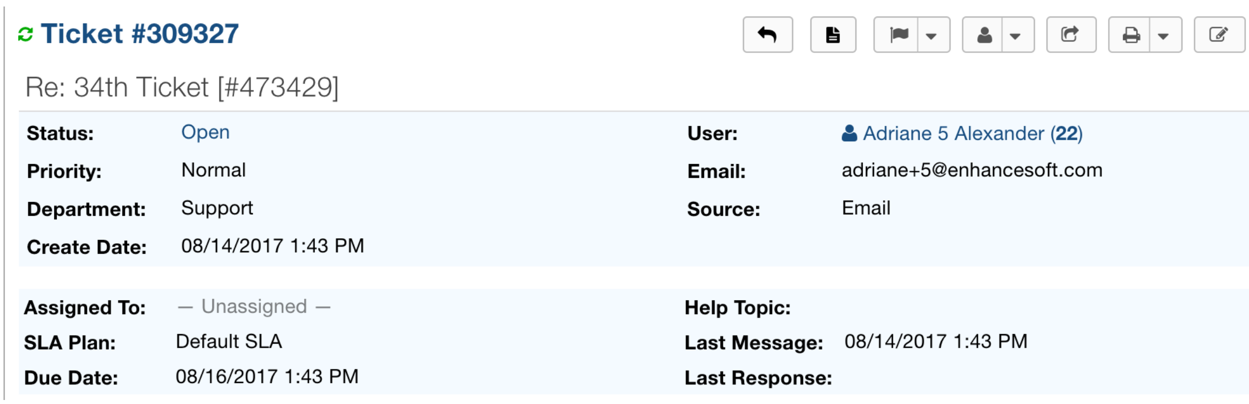
Active departments can be selected for new tickets and used throughout the system as usual.

Archived departments may not be chosen for any new tickets. If a closed ticket receives a response from a user and has an Archived department, a new ticket will be opened referencing the ticket's old title and number. It will have the System Default chosen as the Department.

Closed ticket in Archived Department:



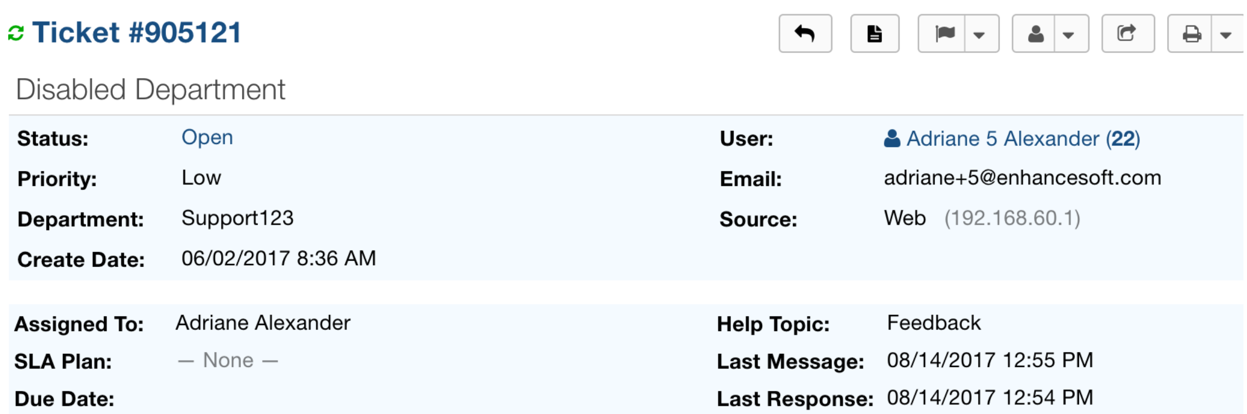
User response to the Closed ticket:



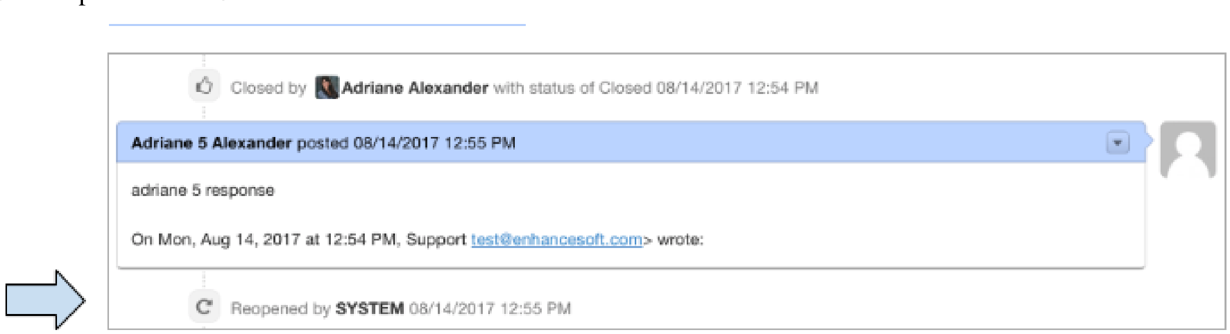
A new ticket is now opened referencing the ticket's old title and number if a User replies by email to the closed ticket.

Disabled departments may not be chosen for any new tickets either, however, if a closed ticket receives a response, the system will reopen the ticket.

Closed ticket in Disabled Department:

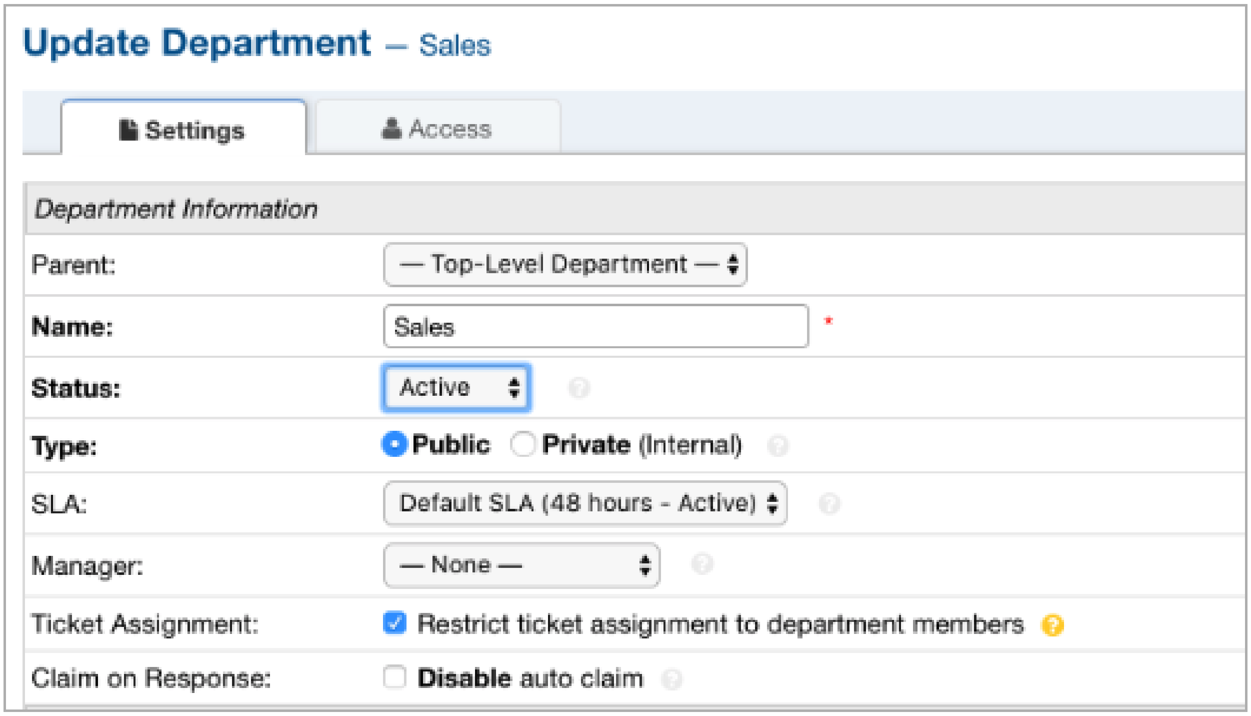


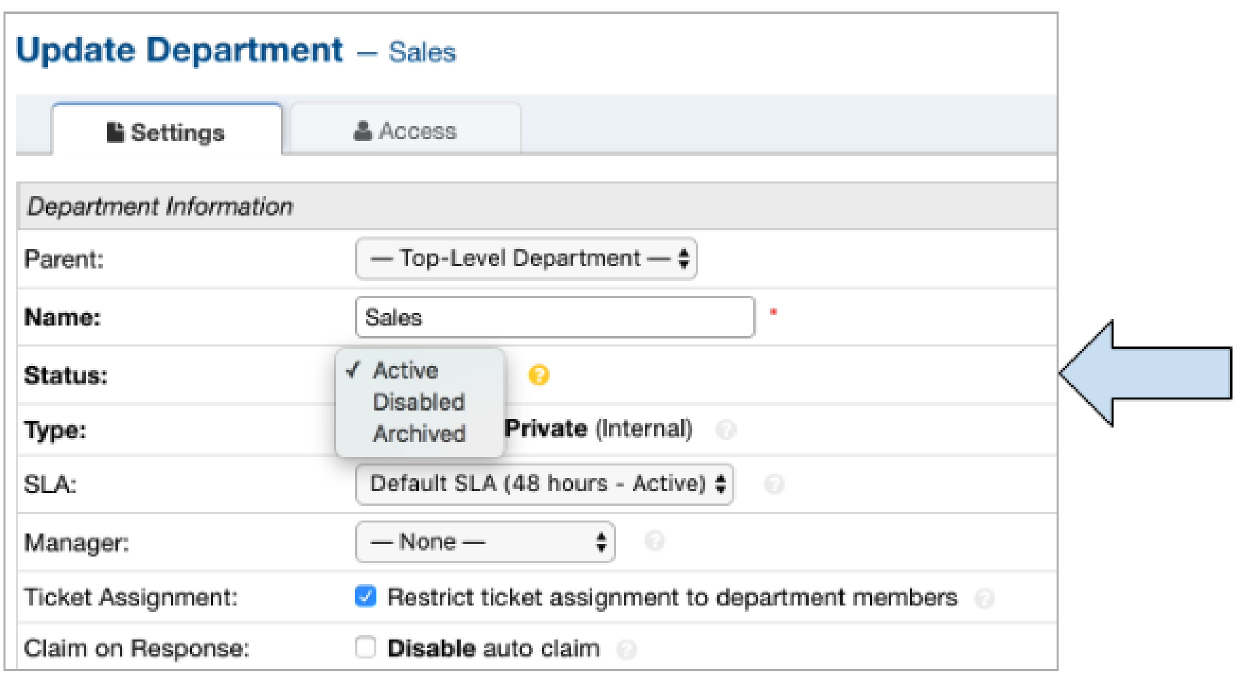
User response to the Closed ticket:



14.2 Changing the Department Status:

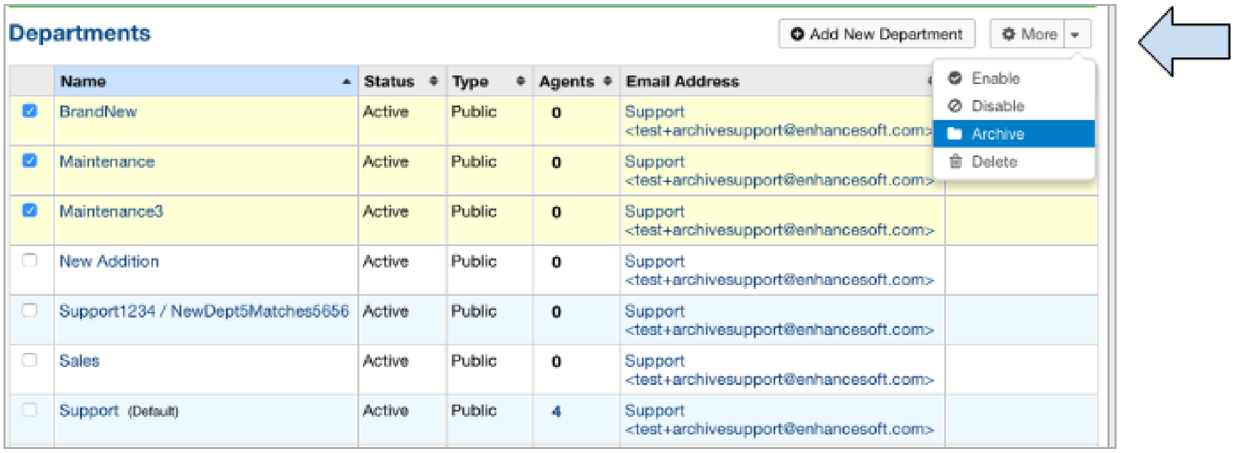
1. Go to: Admin Panel | Agents Tab | Departments
2. Click a Department to modify.





3. Modify multiple Departments at once.

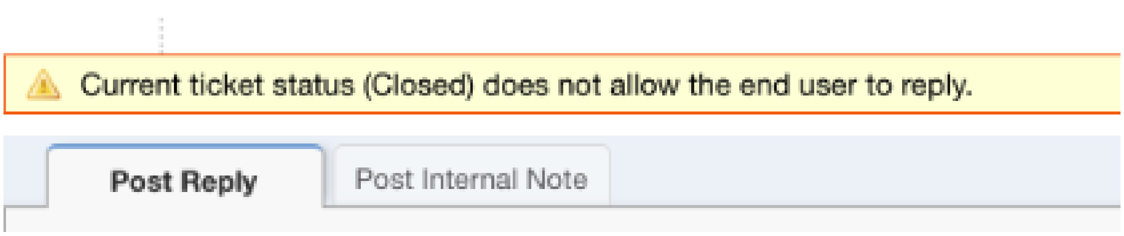
   (a) An agent can change the Status of multiple Departments at once by selecting the checkbox beside each Department to modify and selecting the desired option in the 'More' dropdown.



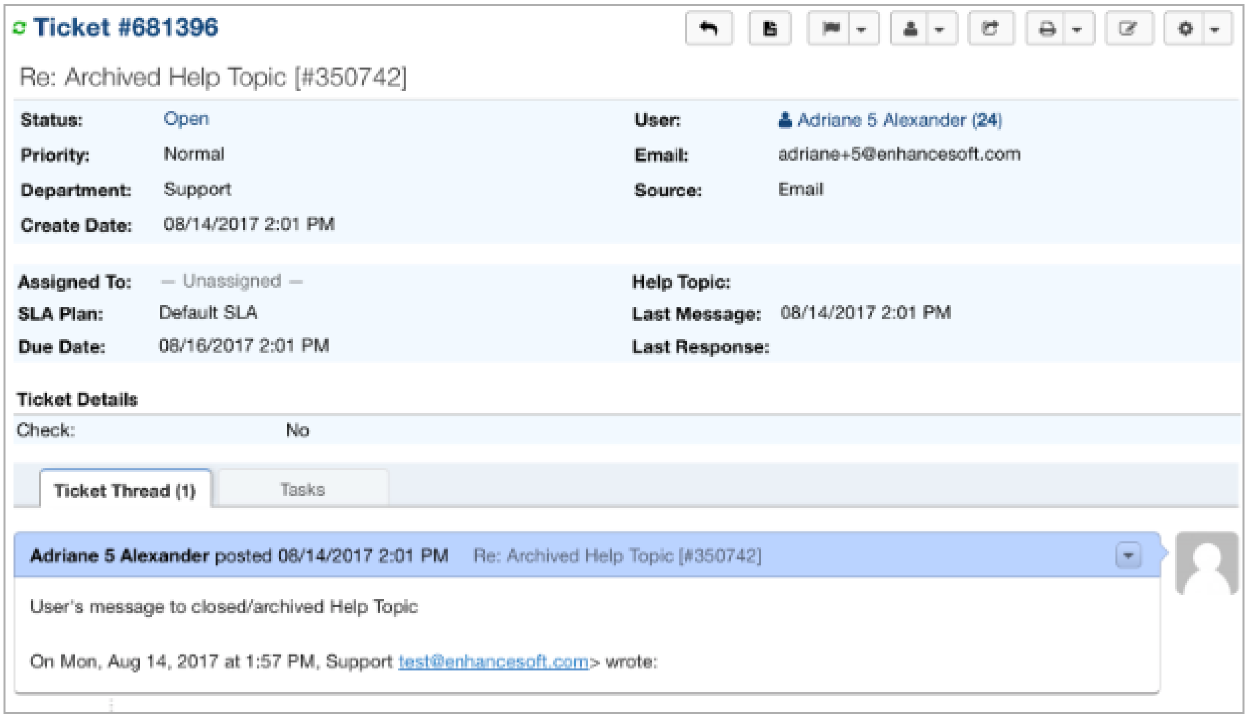
14.3 Help Topics:

Help Topics behave in the same way as Departments. They may have a status of Active, Archived, or Disabled.

Closed ticket in Archived Help Topic:



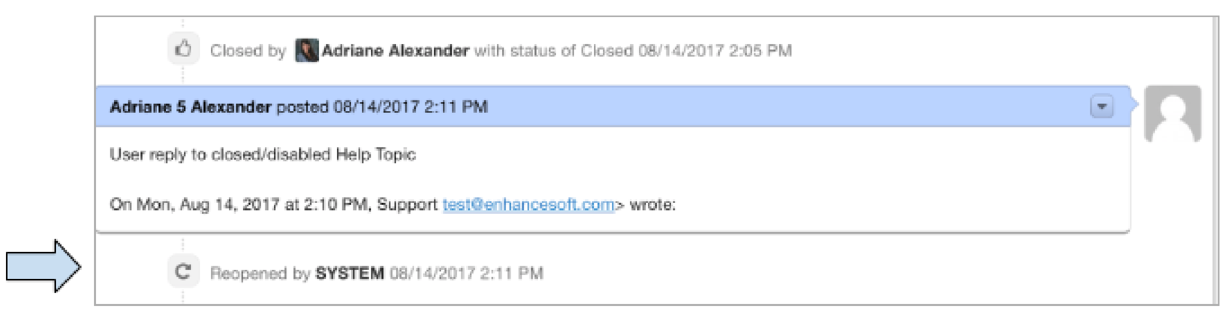
User response to the Closed ticket:



A new ticket is now opened referencing the ticket's old title and number.

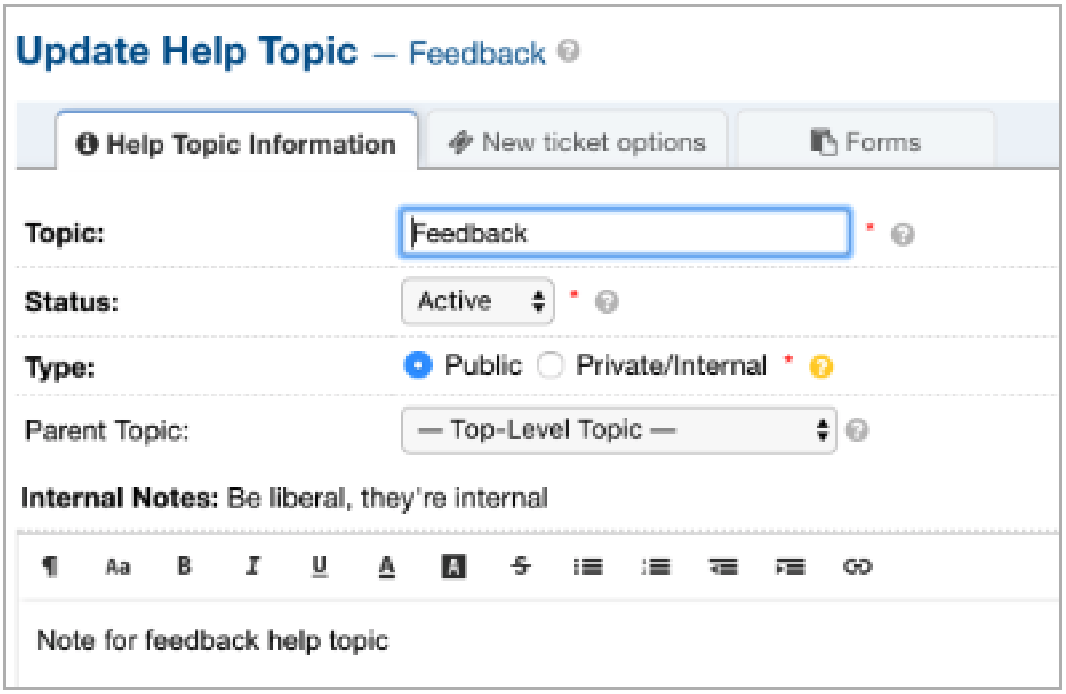
Closed ticket in Disabled Help Topic:

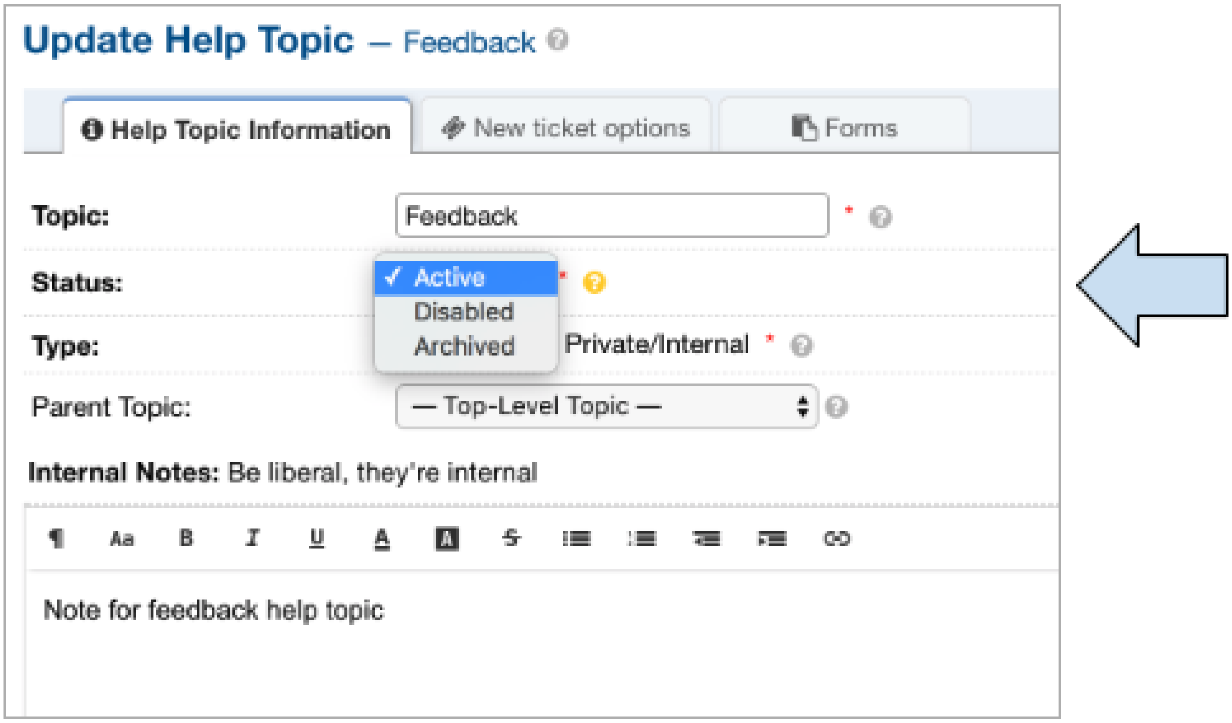
User response to the Closed ticket:



14.4 Changing the Help Topic Status:

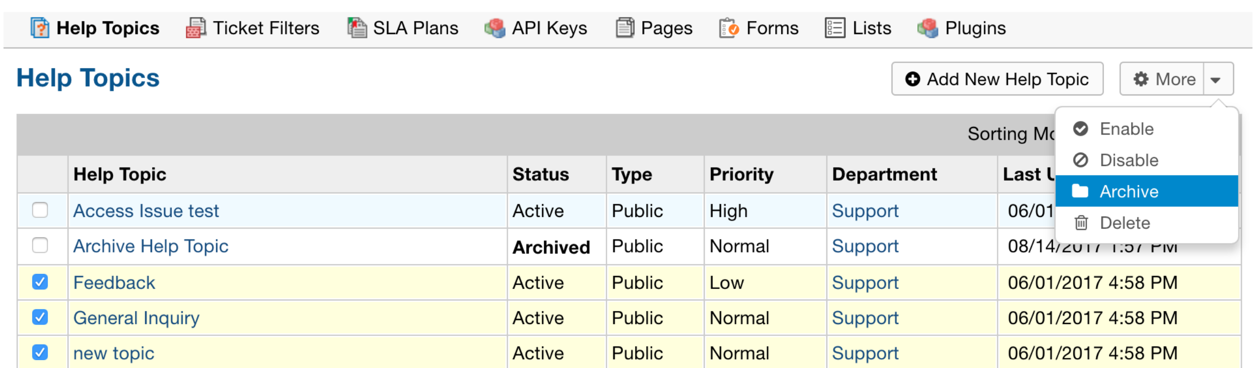
1. Go to: Admin Panel | Manage | Help Topics
2. Click a Help Topic to modify.





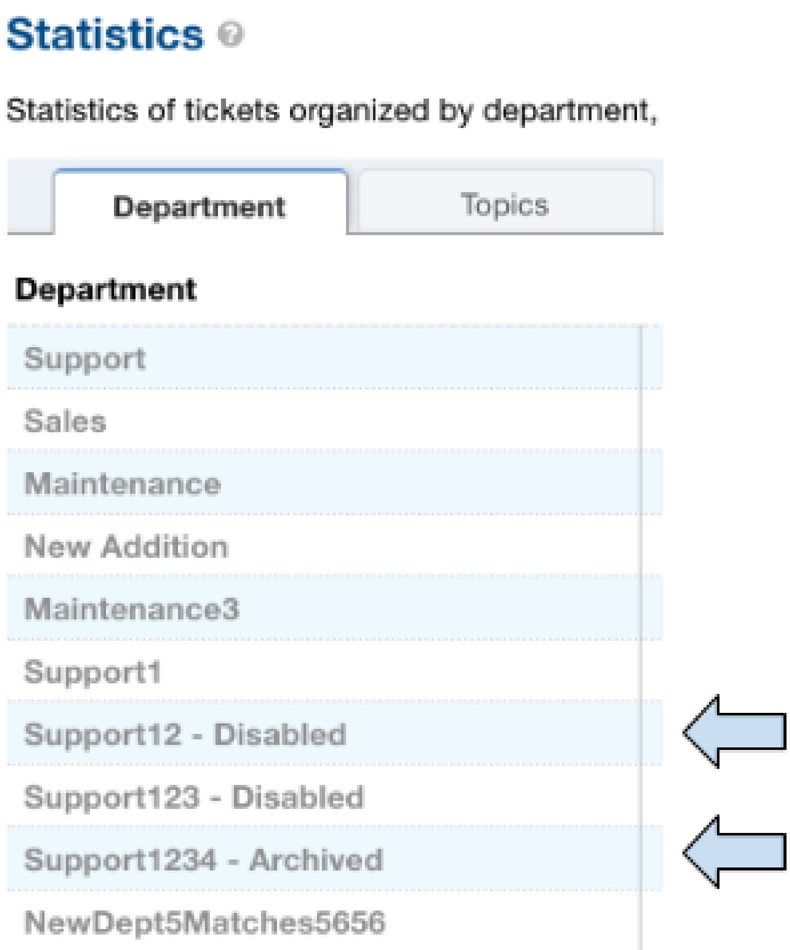
3. Modify multiple Help Topics at once.

   (a) An agent can change the Status of multiple Help Topics at once by selecting the checkbox beside each Help Topic to modify and selecting the desired option in the 'More' dropdown.

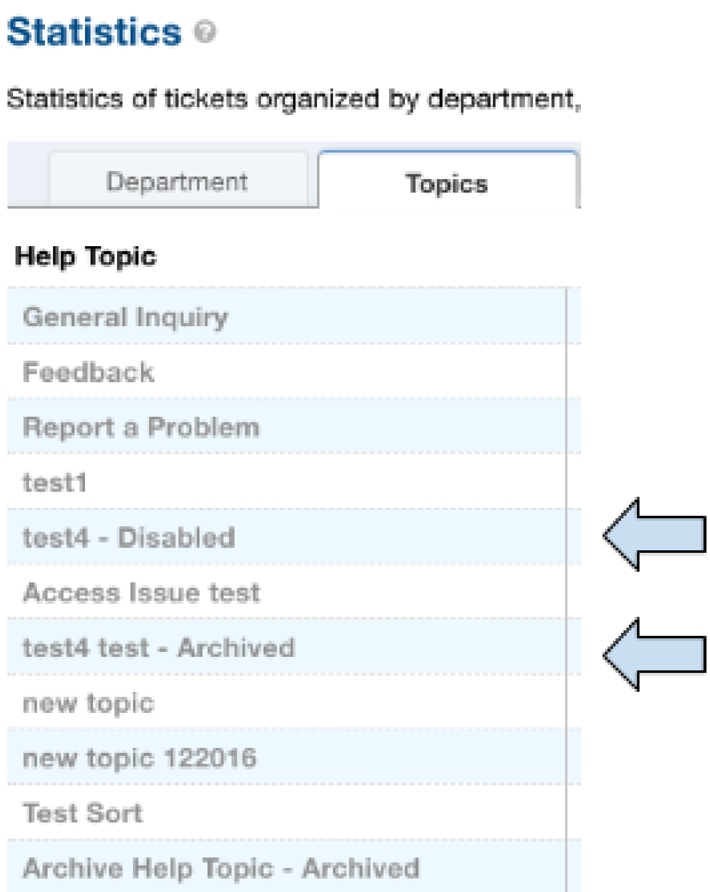


When viewing Dashboard Statistics for Departments and Help Topics, Agents will be able to see the statistics for Disabled or Archived items, and it will state whether the items were Archived or Disabled.

Departments:


Statistics
Statistics of tickets organized by department,
Department
Topics
Department
Support
Sales
Maintenance
New Addition
Maintenance3
Support1
Support12 - Disabled
Support123 - Disabled
Support1234 - Archived
NewDept5Matches5656

Help Topics:


Statistics
Statistics of tickets organized by department,
Department
Topics
Help Topic
General Inquiry
Feedback
Report a Problem
test1
test4 - Disabled
Access Issue test
test4 test - Archived
new topic
new topic 122016
Test Sort
Archive Help Topic - Archived

CHAPTER 15

Collaborators

Collaborators are additional participants that may be included in a Ticket's communications.

This document will outline changes that have been made to how this feature works.

15.1 New Features:

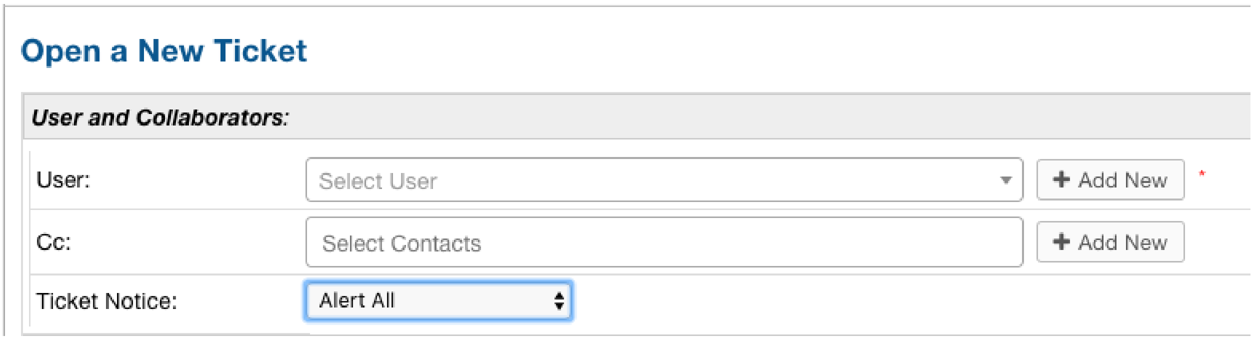
1. Add collaborators as well as CC them when opening a ticket from the Agent Panel.
2. Add collaborators as well as CC them when replying to a ticket as an Agent.
3. Manage collaborators (add/remove collaborators).
4. Change the email address where a ticket is sent out from.
5. View recipients that receive a reply from an agent.
6. As an end user, there is now an icon on the ticket list view to determine if you are a collaborator.
7. New Email Template variables.
8. New setting to hide Tickets where the User is a Collaborator in the Web Portal.

15.2 Collaborators on Ticket Open:

When an Agent creates a Ticket on behalf of a User, they now have the option to add Collaborators.

They also have the option to alert all (User and Collaborators), alert only the User, or do not send an email alert.

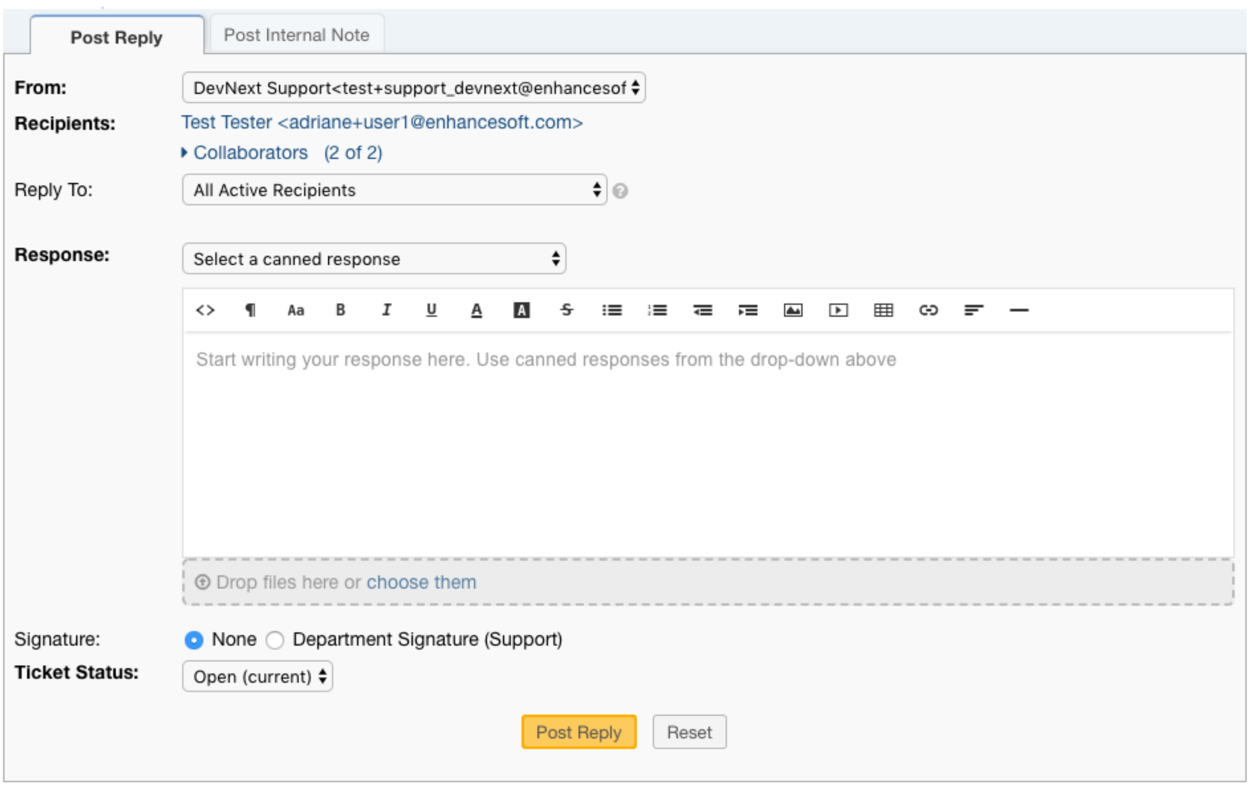
***Note:** If the 'New Ticket by Agent' autoresponse is disabled Agents to not have the Ticket Notice options.



15.3 Collaborators on Ticket Reply:

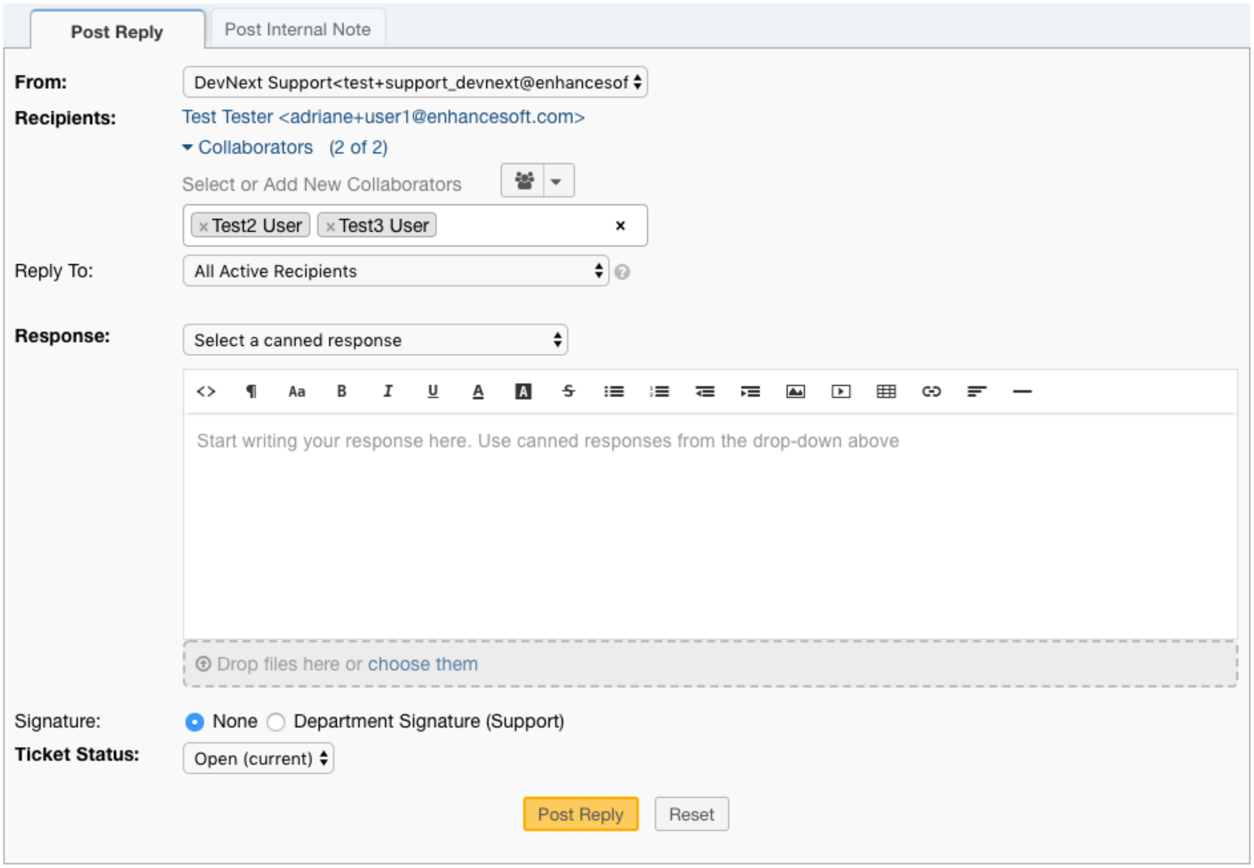
Similarly, an Agent can add Collaborators or choose which Collaborators receive an email when replying to a Ticket.

Initially upon viewing a Ticket, the Agent can see how many Collaborators the Ticket has.

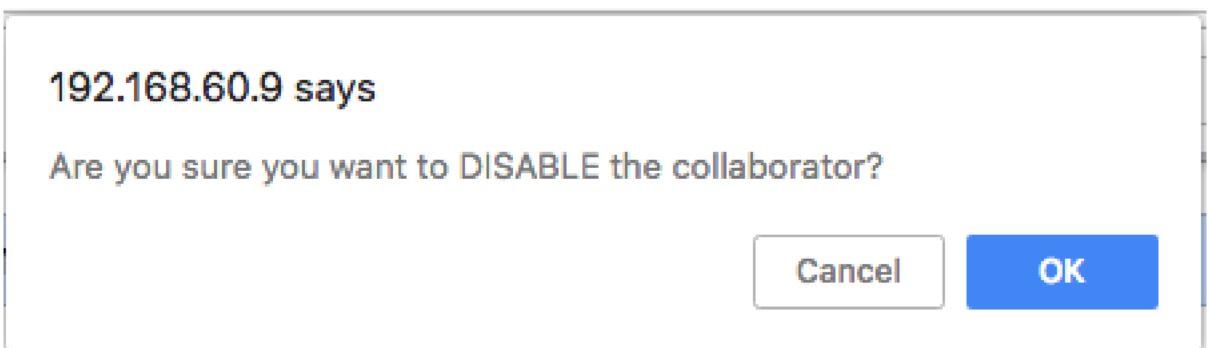


By clicking the arrow beside Collaborators, the Agent is given more options for how to handle Collaborators in their reply like

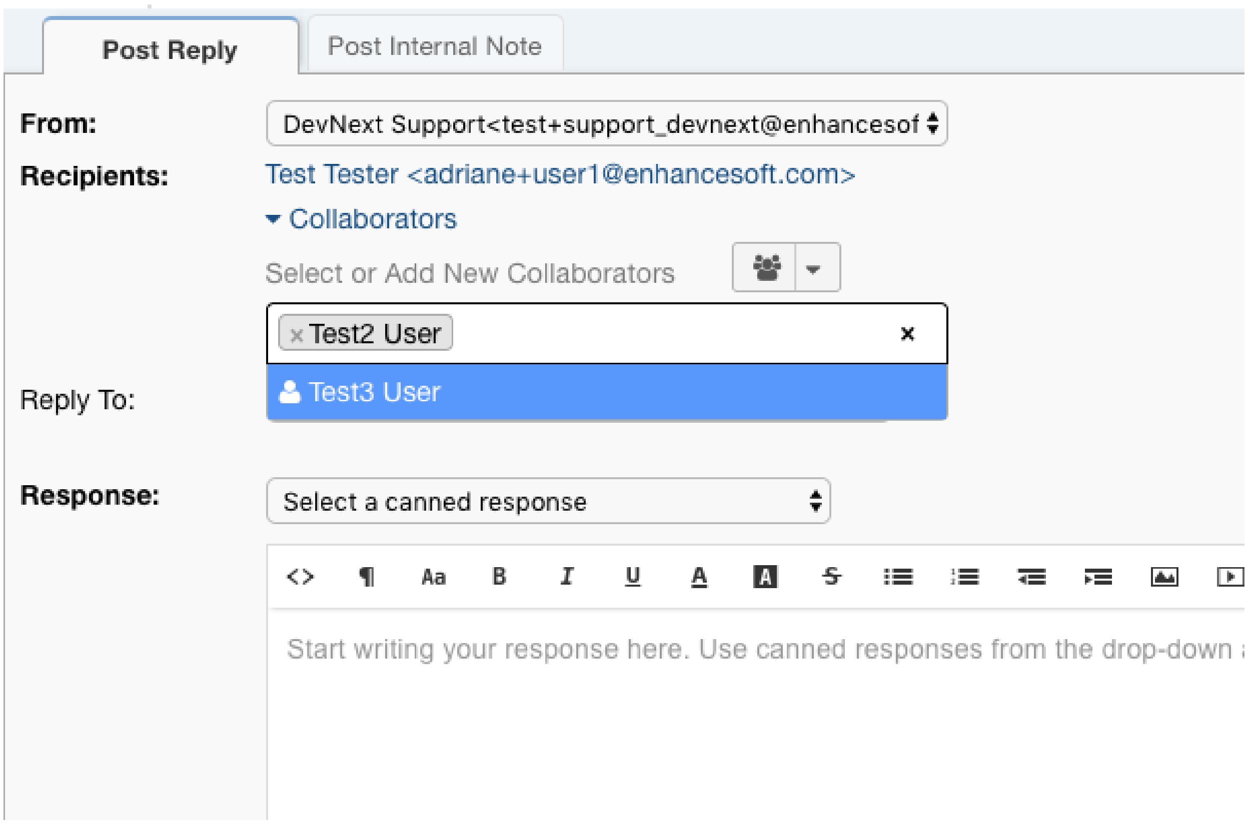
adding new Collaborators or managing existing Collaborators.

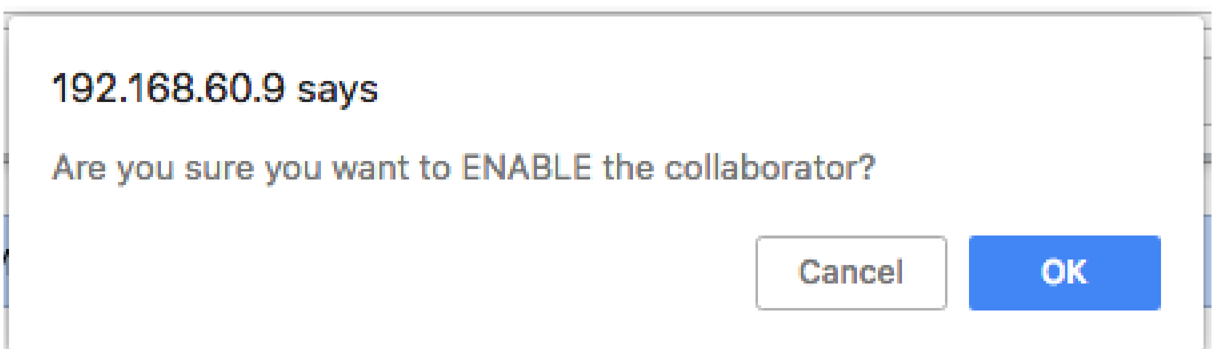


Collaborators that are removed by clicking the 'x' in the left corner of the their name will be disabled in the Ticket, meaning they will no longer receive any of the Agent's responses.



Disabled Collaborators can easily be Enabled again by reselecting and enabling them.



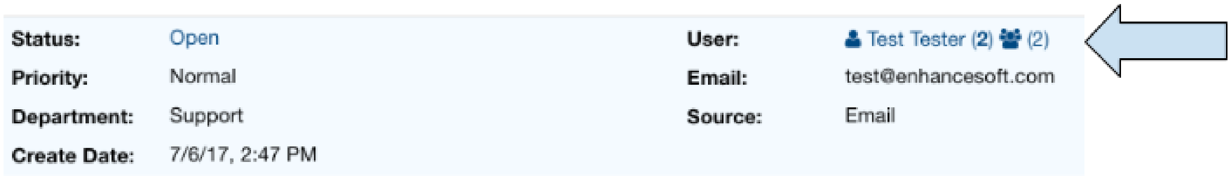


To completely remove a Collaborator, the Agent must go to ‘Manage Collaborators’.

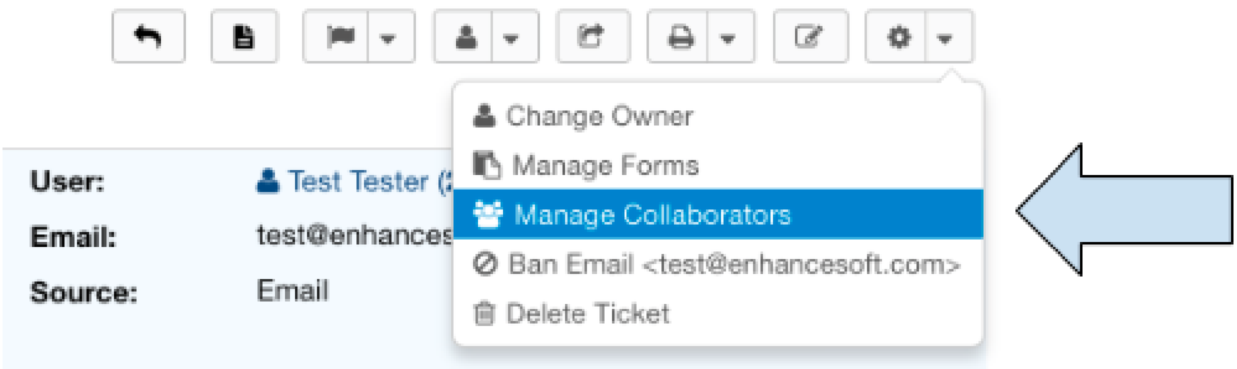
15.4 Manage Collaborators:

There are several places where an agent can go to manage collaborators. The first is beside the User’s name on the ticket.

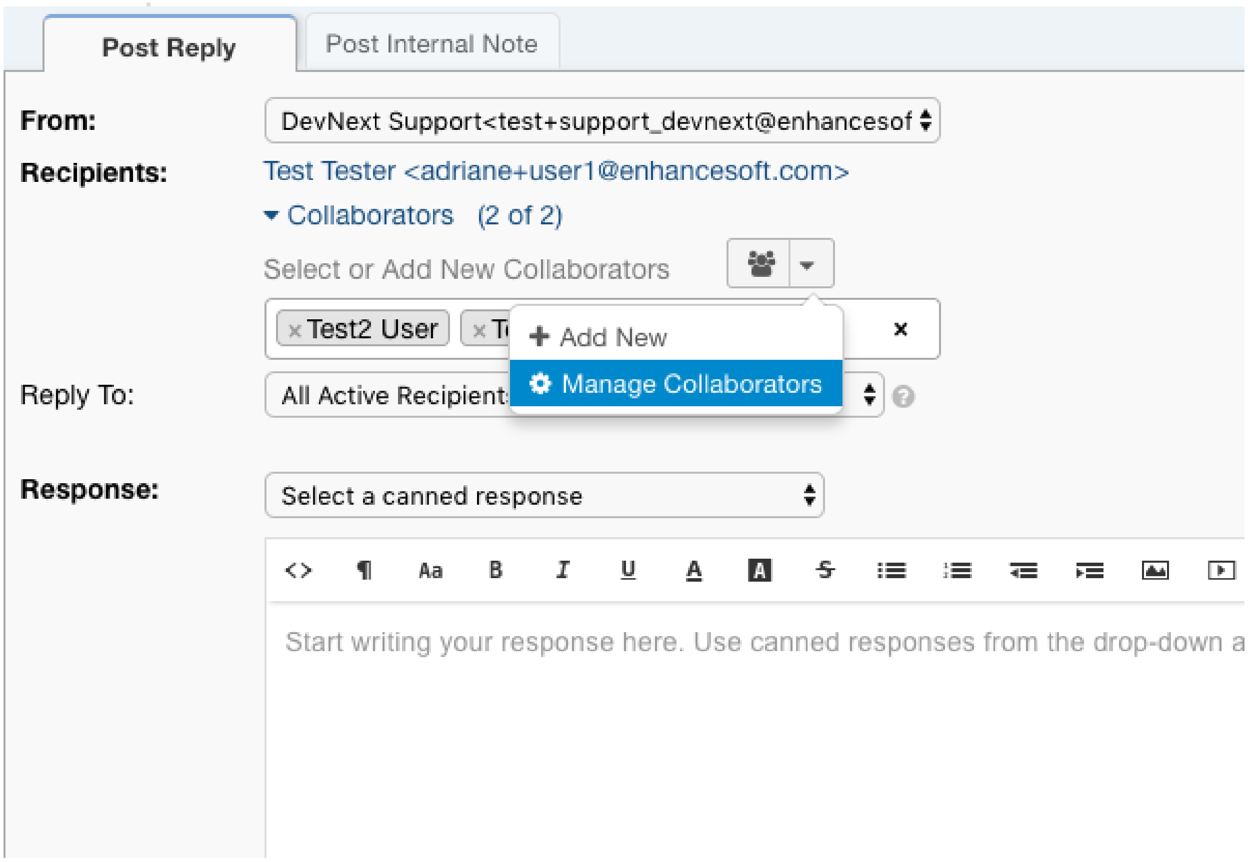
There is a group icon with the number of collaborators the ticket has.



The second place is in the drop down menu next to the ticket settings icon. There is an item to 'Manage Collaborators'.



Finally, you can manage collaborators by clicking the Collaborator listing at the bottom of the Ticket or by clicking in the expanded Collaborators menu.

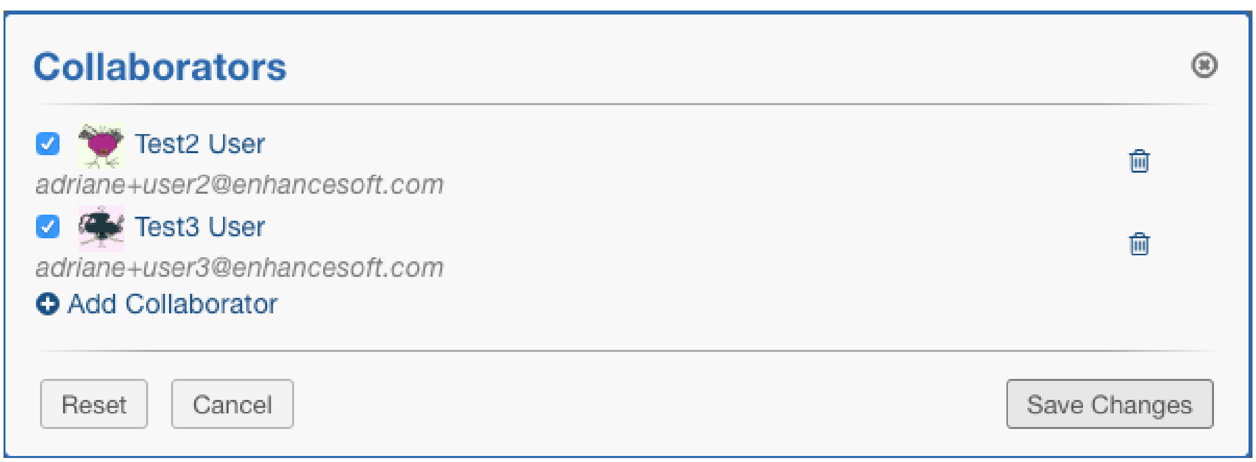


After clicking one of these options, the menu appears to manage the collaborators.

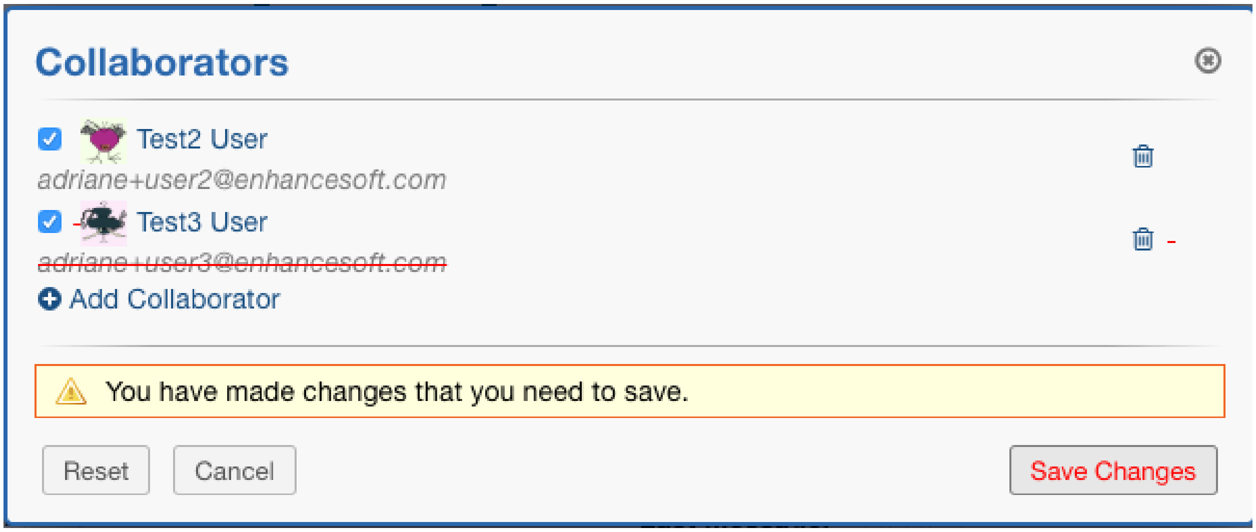
The trash can to the far right of the row allows you to remove collaborators from a ticket.

You can also add new collaborators.

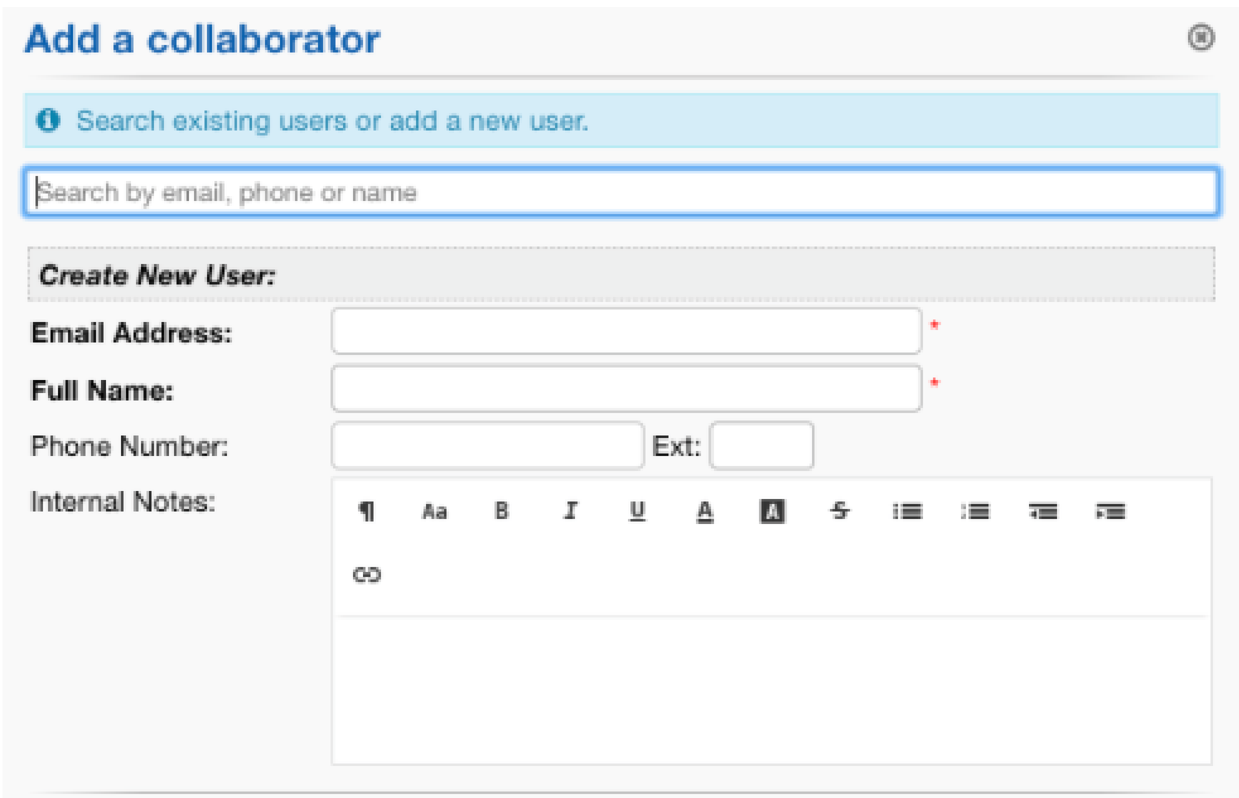
Standard View:

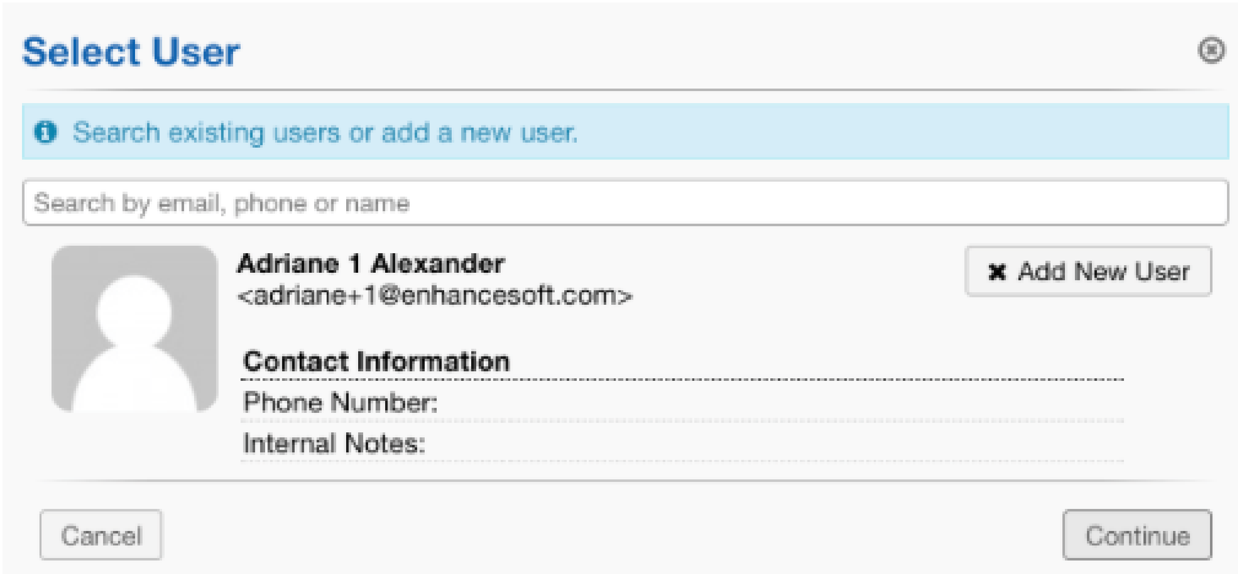


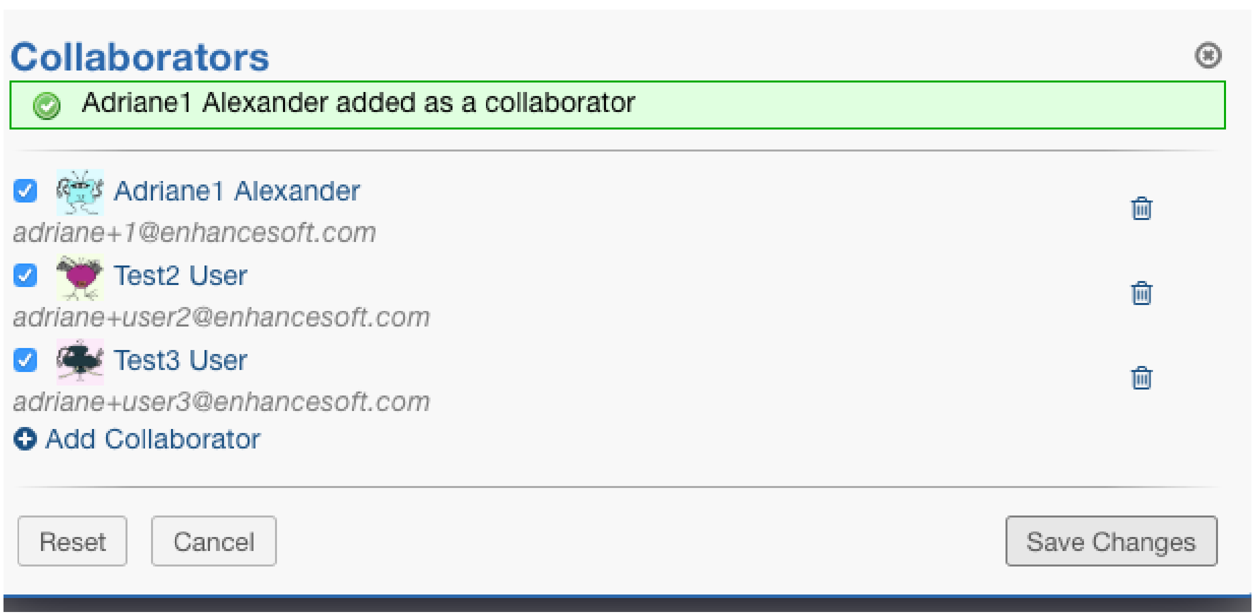
Remove:


Collaborators
Test2 User
adriane+user2@enhancesoft.com
Test3 User
adriane+user3@enhancesoft.com
Add Collaborator
You have made changes that you need to save.
Reset
Cancel
Save Changes

Add:


Add a collaborator
Search existing users or add a new user.
Search by email, phone or name
Create New User:
Email Address:
Full Name:
Phone Number:
Ext:
Internal Notes:





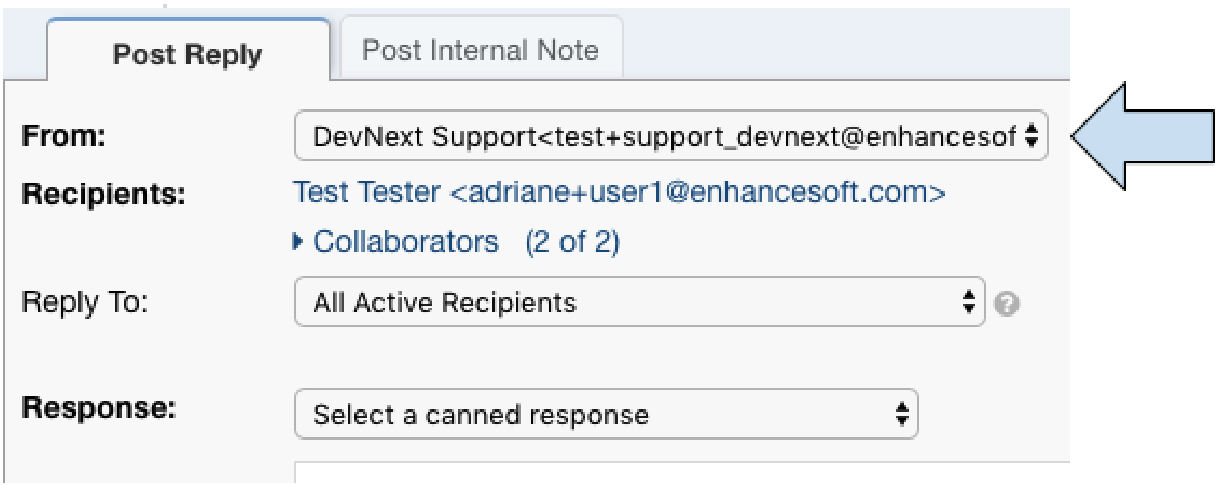
***Note:** The checkbox to the left of the Collaborator's name indicates if the Collaborator is Enabled or Disabled. Disabled Collaborators will not receive Ticket responses.

This action is the same as clicking the 'x' in the left corner of a Colalborator's name in the expanded Collaborator menu at the bottom of the Ticket.

15.5 'From' Email:

In the past, tickets were always sent out using the email address belonging to the Ticket's Department.

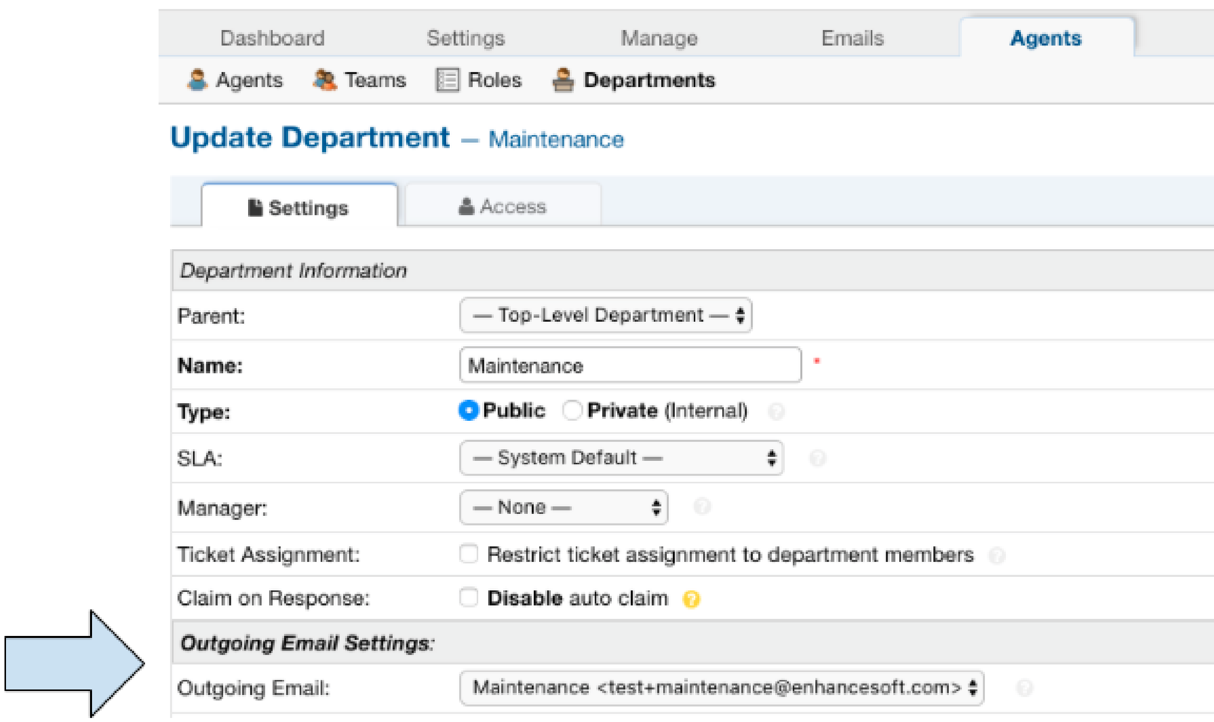
Agents are now able to choose which email address a ticket is sent out from if your system has more than one email configured.



By default, tickets are sent out from the email address chosen for the department's Outgoing Email.

The department's default address can be modified by going to:

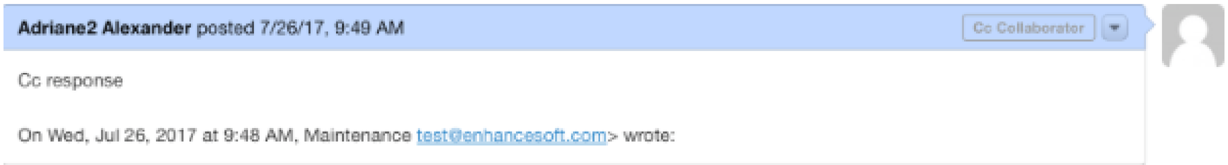
Admin Panel | Agents Tab | Departments | Choose a Department | Outgoing Email



15.6 Collaborator Responses:

An Agent is able to determine that a Collaborator has responded to the ticket by looking at the label next to each message.

Collaborator Response:



User Response:

***Note:** When a User or Collaborator replies to an email, Alerts are NOT sent out to other participants,

while Alerts ARE sent out when a User or Collaborator replies using the Web Portal.

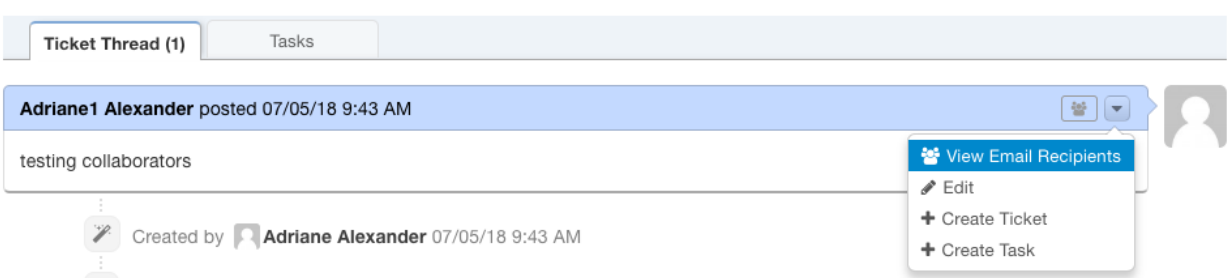
This is simply because the User or Collaborator has the option to reply to all recipients or to reply only to the helpdesk when replying to the email.

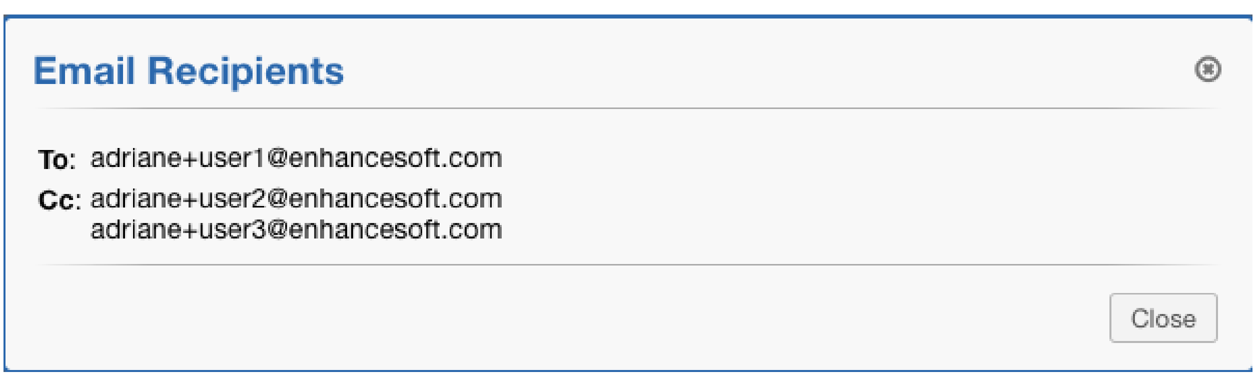
15.7 View Email Recipients:

Any time an email is sent out whether it is from the Agent or the User, there is now an option to see who the email was sent out to.

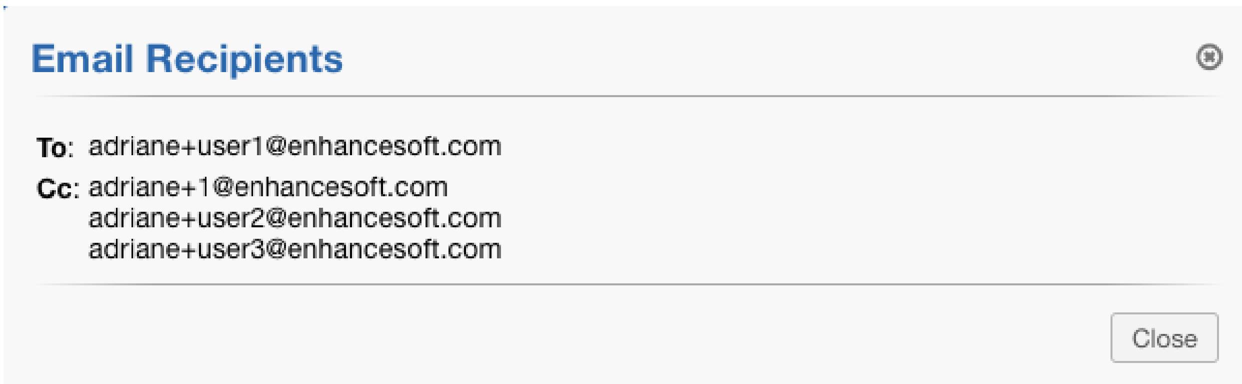
This can be done by clicking the drop down arrow beside a Ticket thread and selecting 'View Email Recipients'.

User Response:



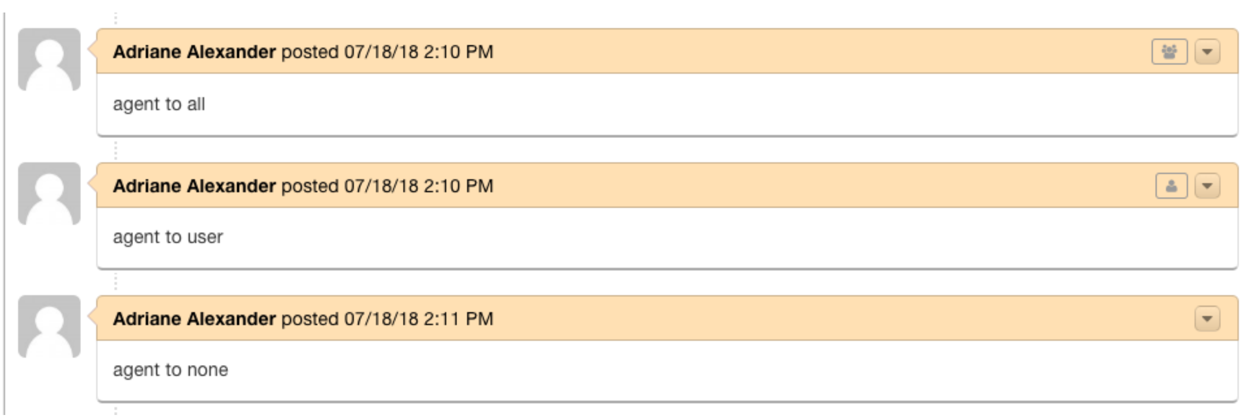


Agent Response:



Additionally, an Agent is able to see if a response was a Reply All, Reply to User, or reply to no one by looking at the tag in the corner of the Thread Entry.

***Note:** When a Ticket is created on behalf of a User, the initial message entered by the Agent will have the appropriate tag as well.



15.8 Collaborator Icon:

When end users log into the system and view the list of tickets they have access to, they will now see an icon beside the ticket name if they are a

Collaborator on the ticket. If there is no icon, they are the ticket owner.

585933	7/3/17	Open	New	Sales
467431	7/3/17	Open	Sales Ticket	Sales

15.9 Email Template Variables:

Ticket Recipients:

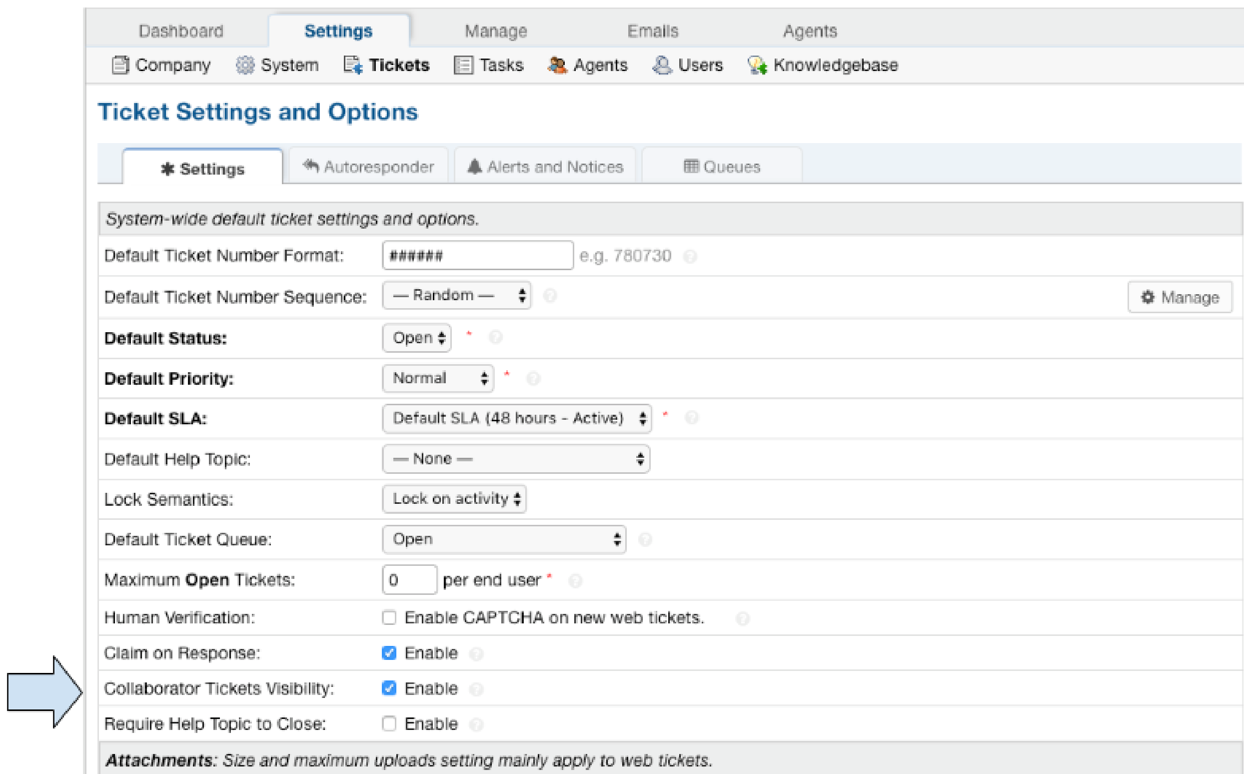
Format: %{ticket.recipients} This variable displays a list of visible/active users that are collaborating on a ticket.

15.10 Hide Collaborator Tickets:

In some instances, Agents may only want their Users to see their own Tickets if they log into the Web Portal rather than every Ticket they participate in.

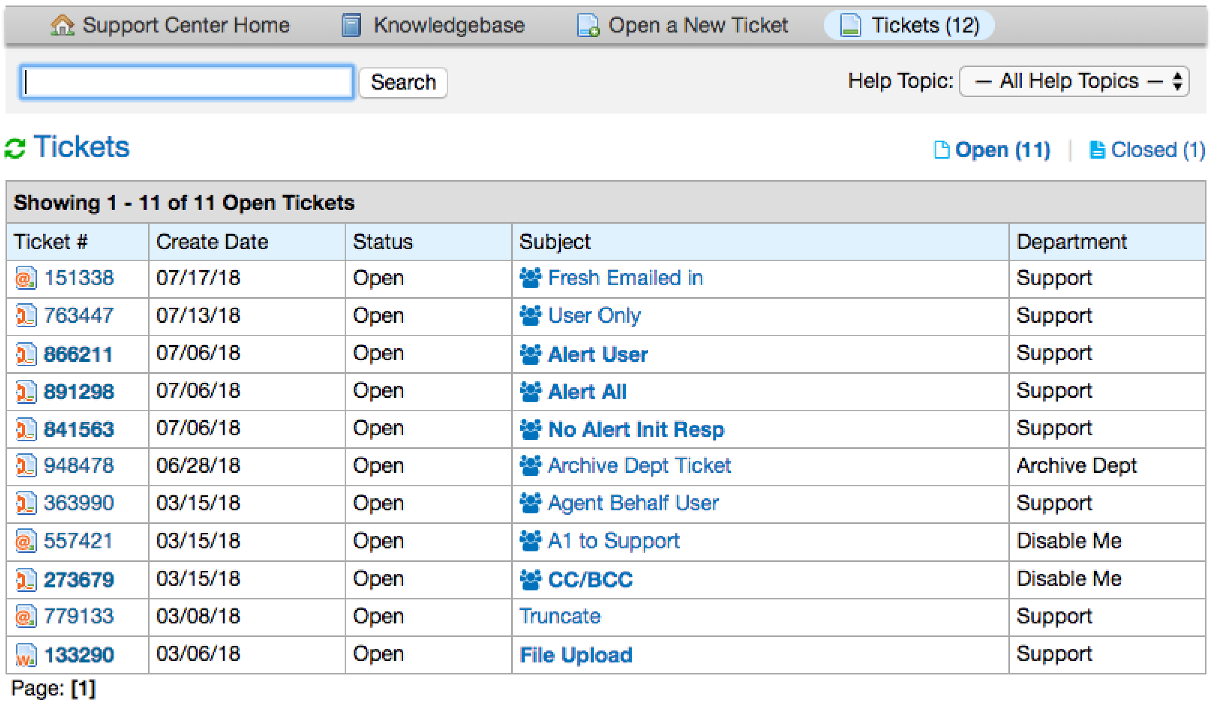
We now have a setting to control this.

If the Agent would like to disable Users from seeing their Collaborator Tickets, they can configure the setting here: Admin Panel | Tickets | Settings | Collaborator Tickets Visibility



By default, Users are able to see all Tickets they participate in.

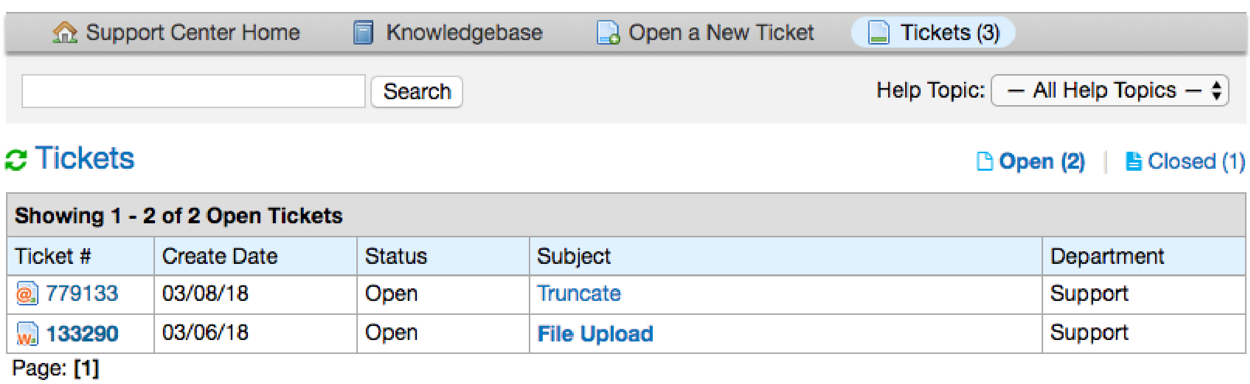
View of All Tickets:



Ticket #	Create Date	Status	Subject	Department
151338	07/17/18	Open	Fresh Emailed in	Support
763447	07/13/18	Open	User Only	Support
866211	07/06/18	Open	Alert User	Support
891298	07/06/18	Open	Alert All	Support
841563	07/06/18	Open	No Alert Init Resp	Support
948478	06/28/18	Open	Archive Dept Ticket	Archive Dept
363990	03/15/18	Open	Agent Behalf User	Support
557421	03/15/18	Open	A1 to Support	Disable Me
273679	03/15/18	Open	CC/BCC	Disable Me
779133	03/08/18	Open	Truncate	Support
133290	03/06/18	Open	File Upload	Support

Page: [1]

View of only the User's Tickets:



Ticket #	Create Date	Status	Subject	Department
779133	03/08/18	Open	Truncate	Support
133290	03/06/18	Open	File Upload	Support

Page: [1]

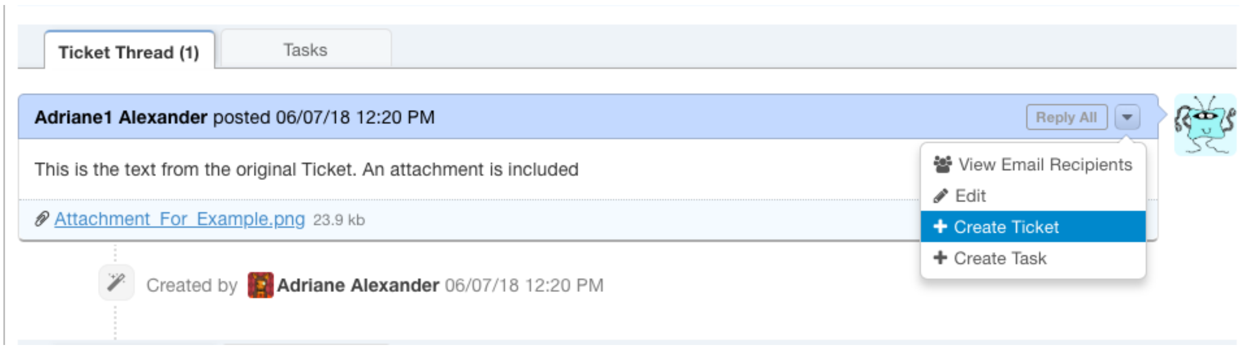
CHAPTER 16

Create Ticket or Task from Thread Entry

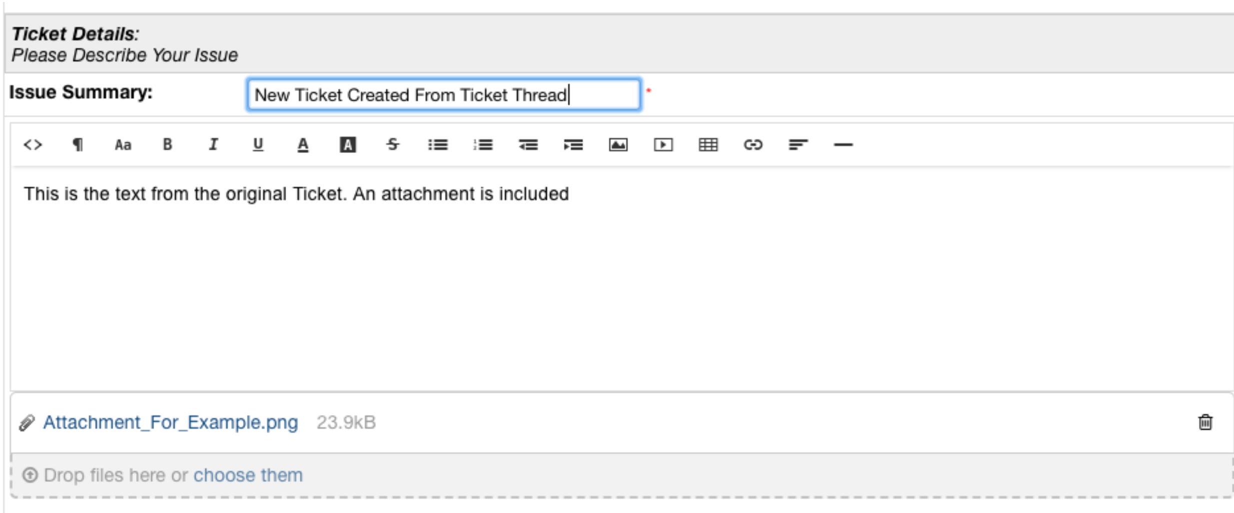
Agents now have the ability to create a Ticket or Task from a Ticket's thread entry or from a Tasks thread entry.

16.1 Ticket From Ticket Thread Entry

Original Ticket:

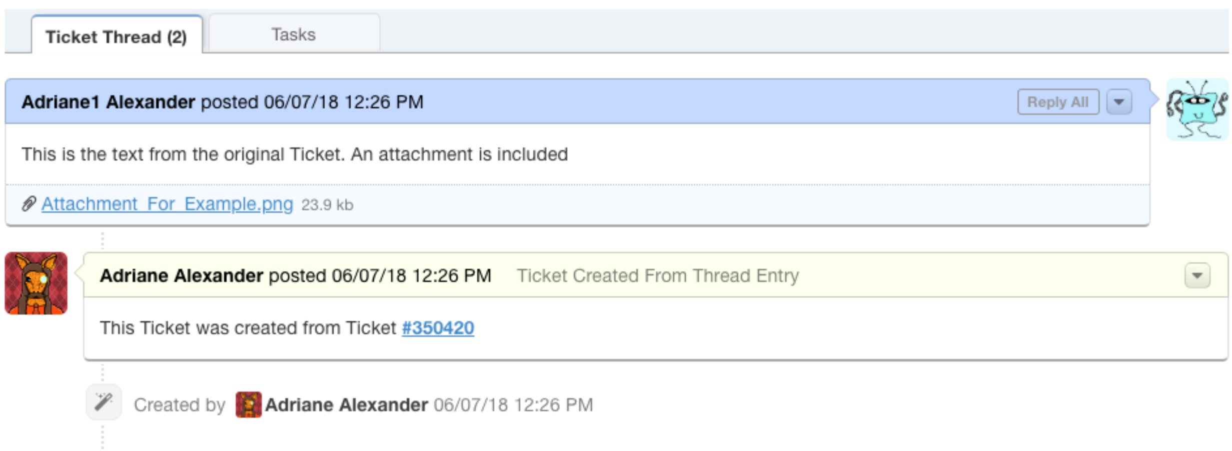


Opening the New Ticket from the Ticket Thread Entry:



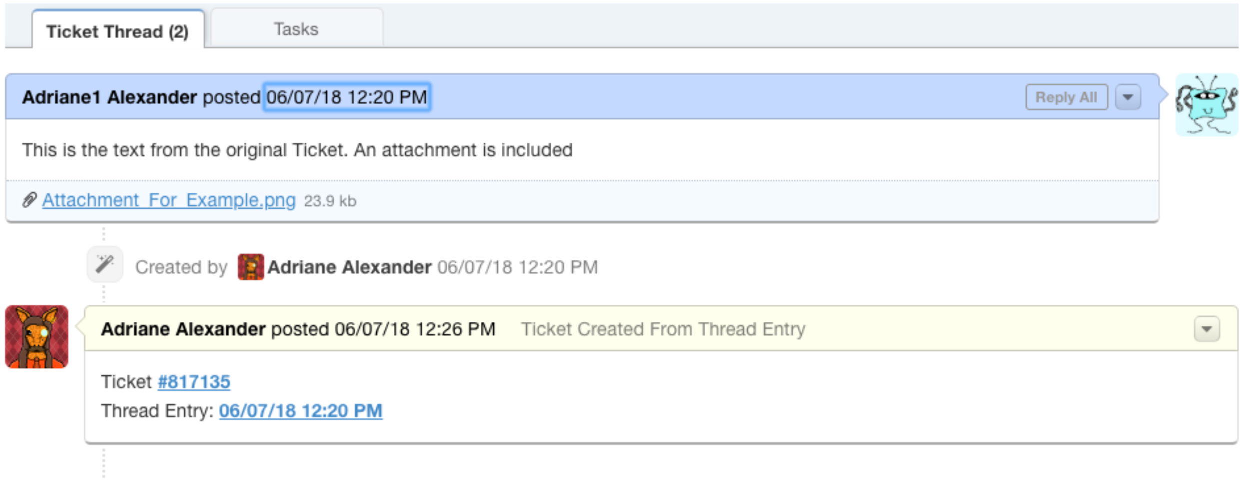
***Notice:** The attachment from the original Ticket is carried over into the new Ticket.

New Ticket that was created:



***Notice:** An Internal Note is added to the new Ticket referencing the Ticket Number the new Ticket was created from. Clicking on that reference will open the original Ticket.

Original Ticket After:

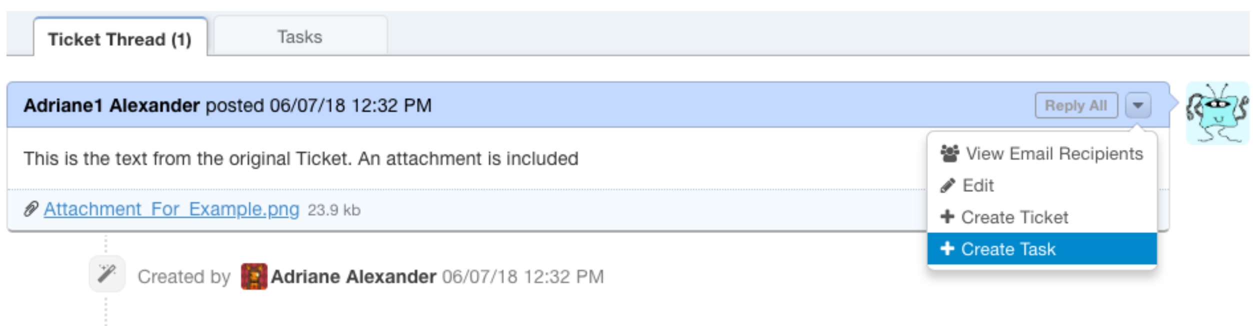


***Notice:** An Internal Note is added to the original Ticket referencing the new Ticket's number as well as the Thread Entry the Ticket was created from.

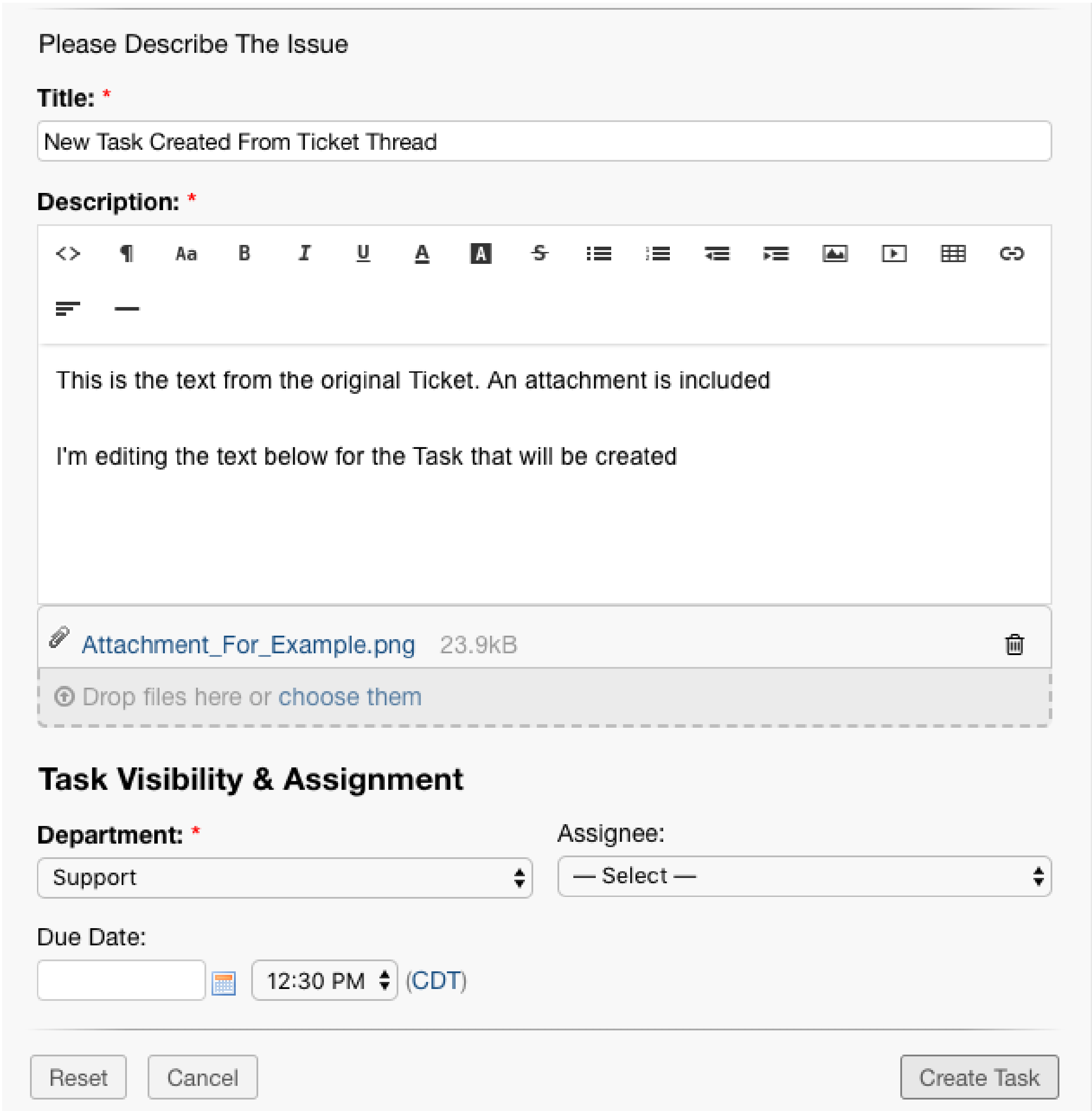
Clicking the Ticket Number will open the new Ticket that was created. Clicking the Thread Entry will scroll the Ticket up to the Thread Entry the new Ticket was created from.

16.2 Task From Ticket Thread Entry

Original Ticket:

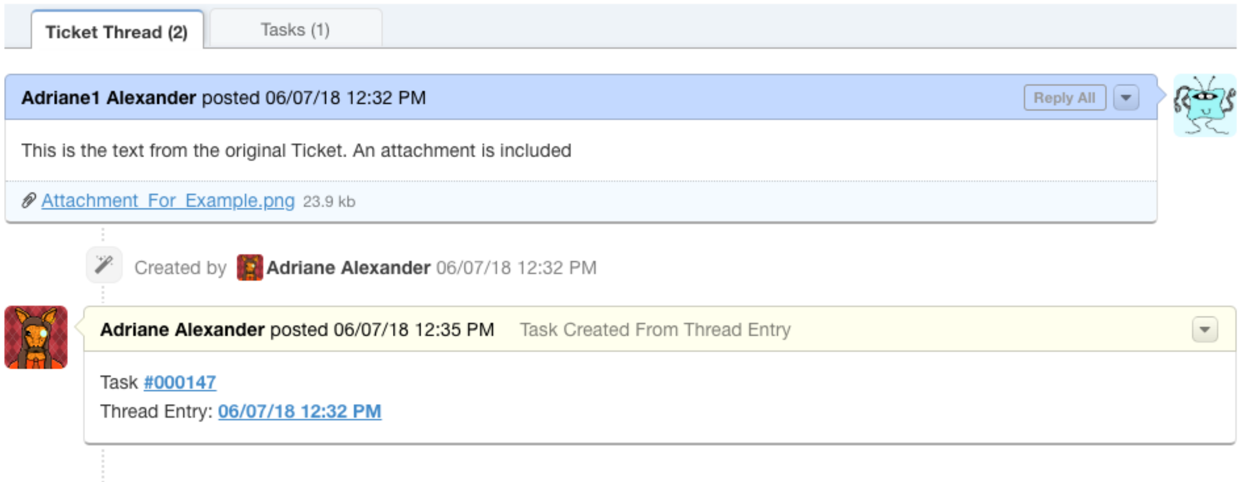


Task being created from Ticket:



***Notice:** The attachment from the original Ticket is carried over into the new Task.

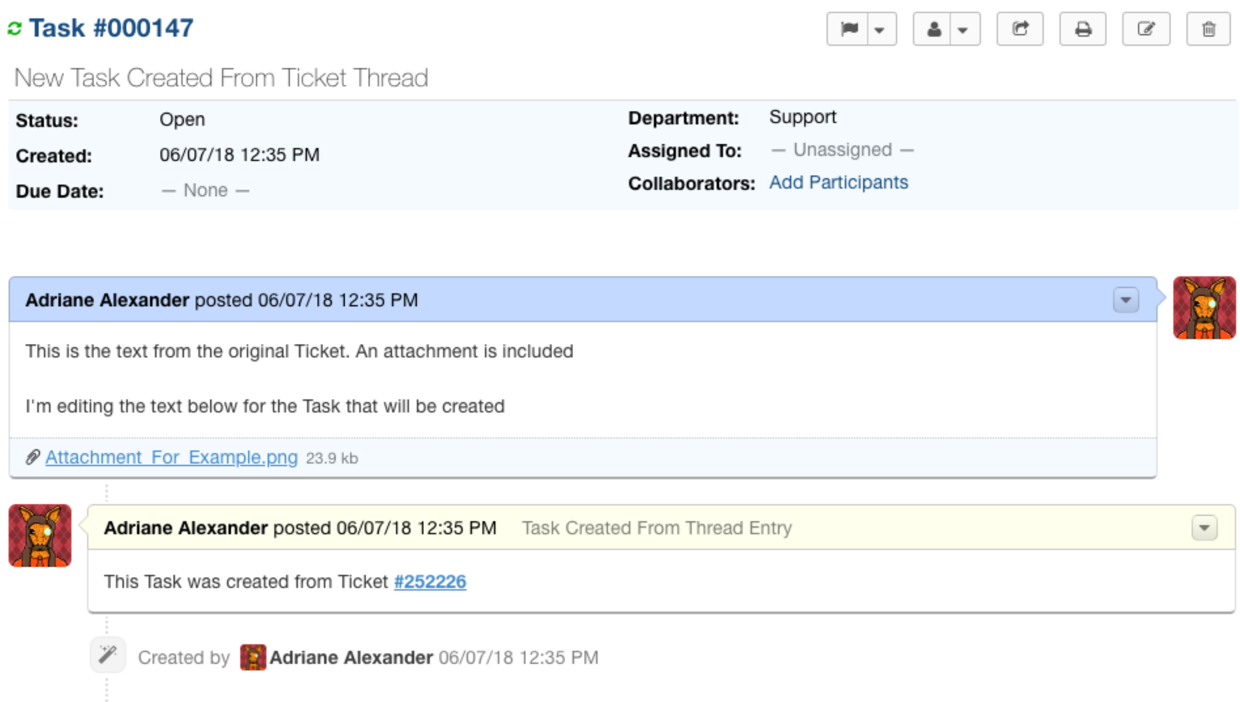
Original Ticket After:



***Notice:** An Internal Note is added to the original Ticket referencing the new Task's number as well as the Thread Entry the Task was created from.

Clicking the Task Number will open the new Task that was created. Clicking the Thread Entry will scroll the Ticket up to the Thread Entry the new Task was created from.

New Task that was created:

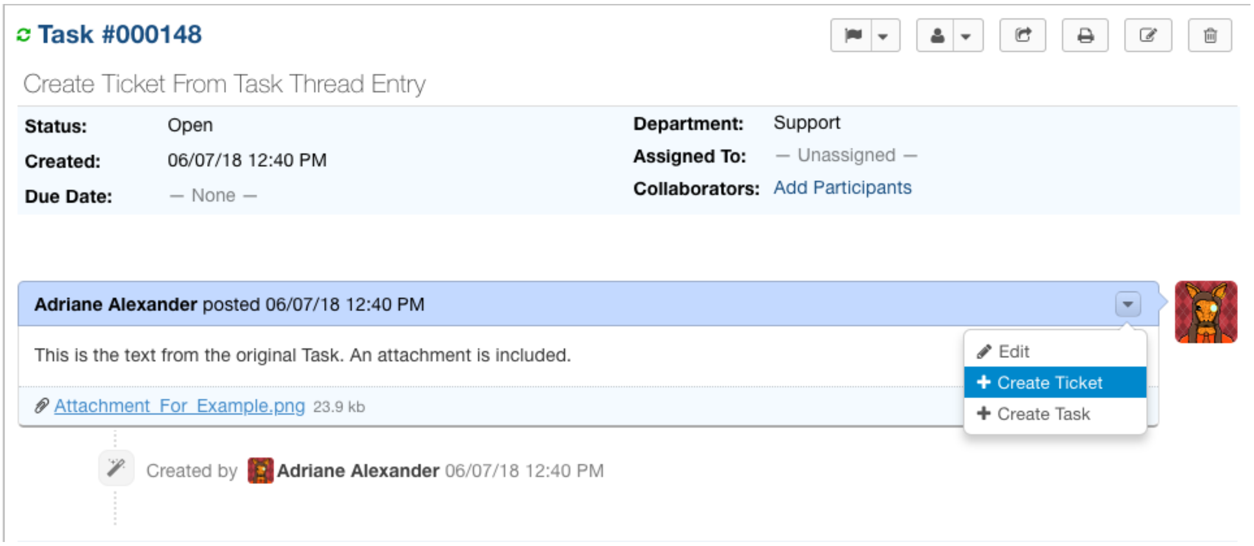


***Notice:** An Internal Note is added to the new Task referencing the Ticket Number the new Task was created from.

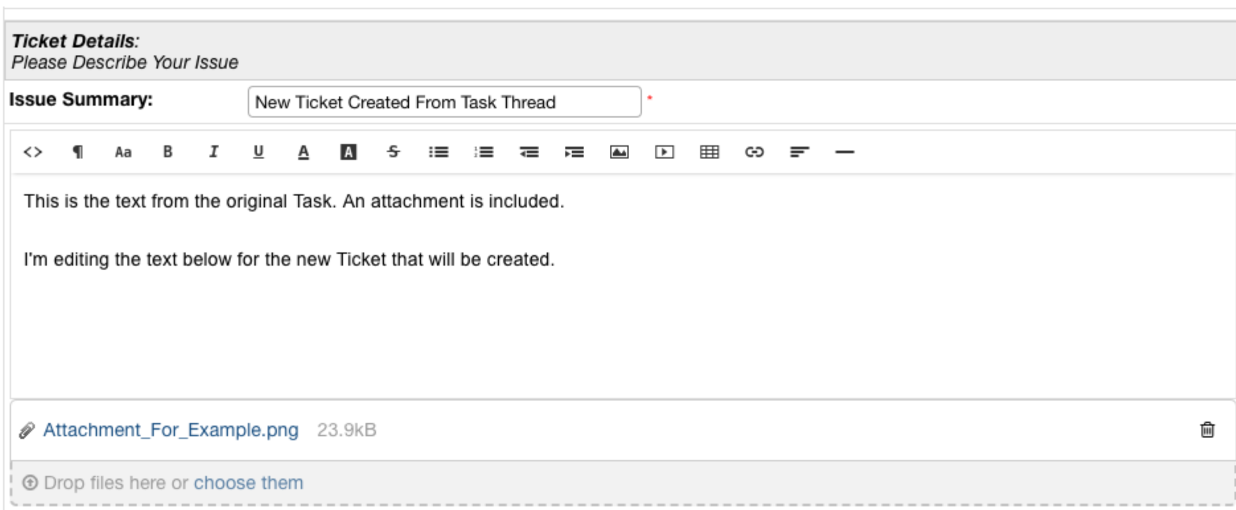
Clicking on that reference will open the original Ticket.

16.3 Ticket From Task Thread Entry

Original Task:

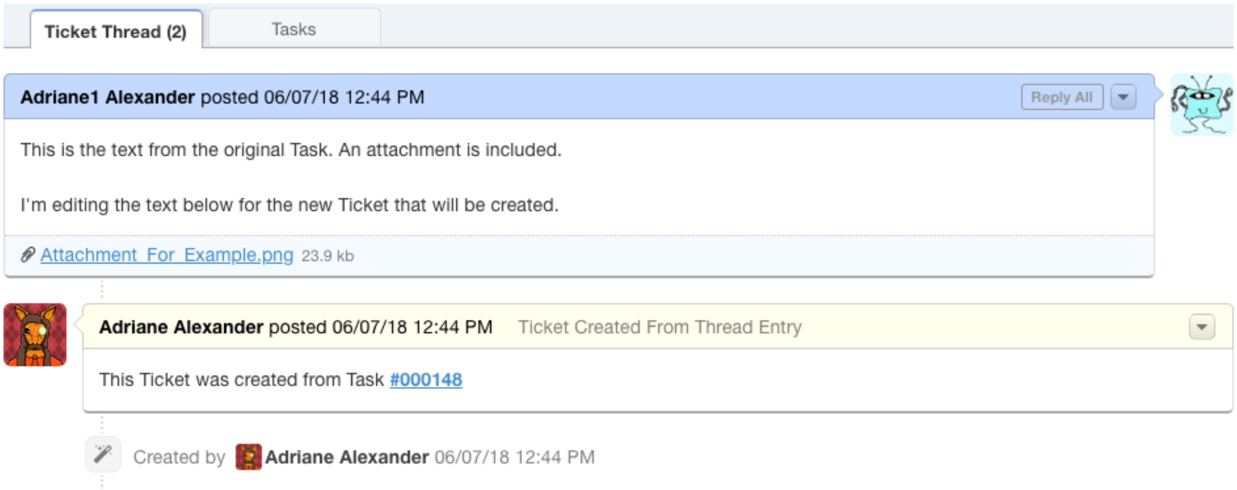


Opening the New Ticket from the Task Thread Entry:



***Notice:** The attachment from the original Task is carried over into the new Ticket.

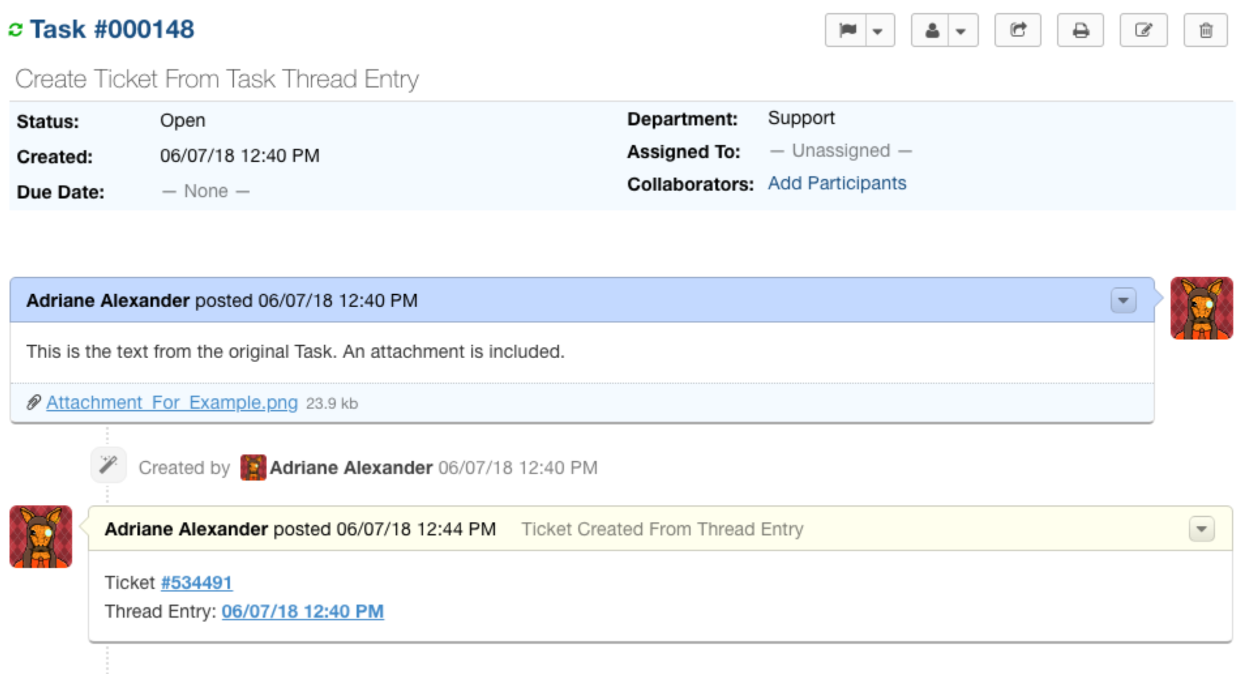
New Ticket that was created:



***Notice:** An Internal Note is added to the new Ticket referencing the Task Number the new Ticket was created from.

Clicking on that reference will open the original Task.

Original Task After:

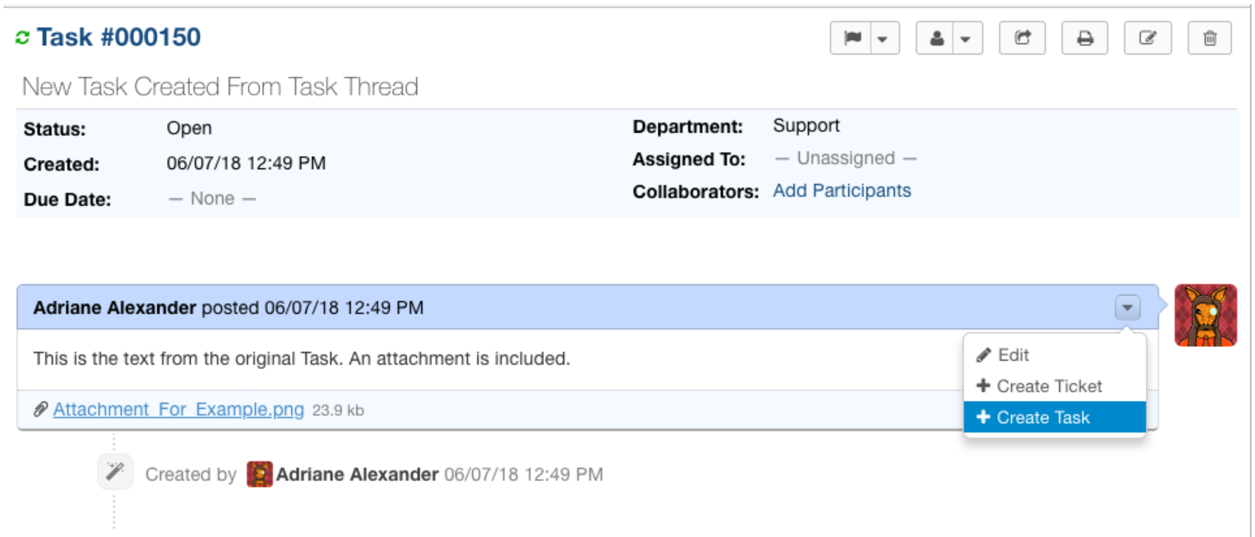


***Notice:** An Internal Note is added to the original Task referencing the new Ticket's number as well as the Thread Entry the Ticket was created from.

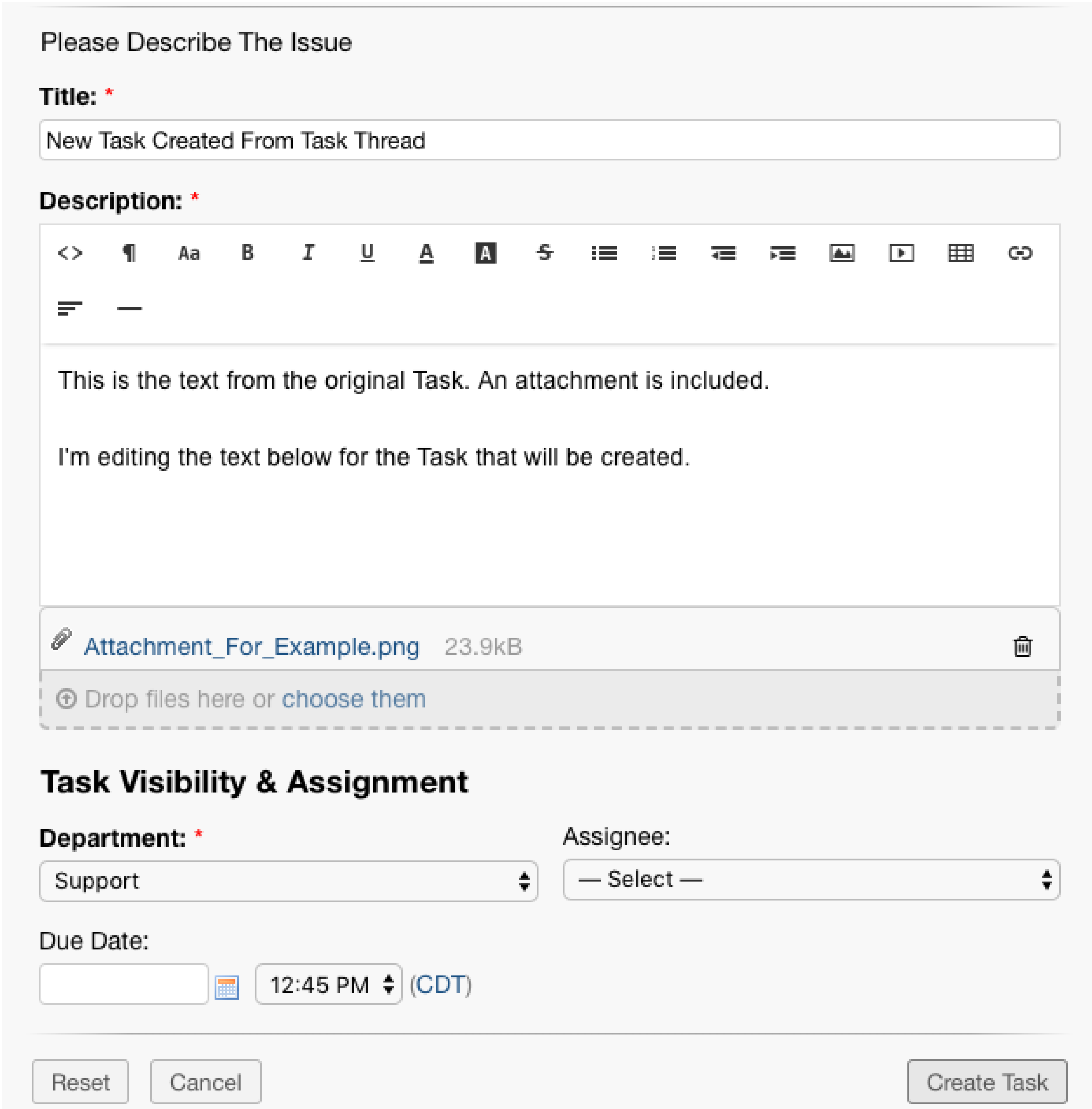
Clicking the Ticket Number will open the new Ticket that was created. Clicking the Thread Entry will scroll the Task up to the Thread Entry the new Ticket was created from.

16.4 Task From Task Thread Entry

Original Task:

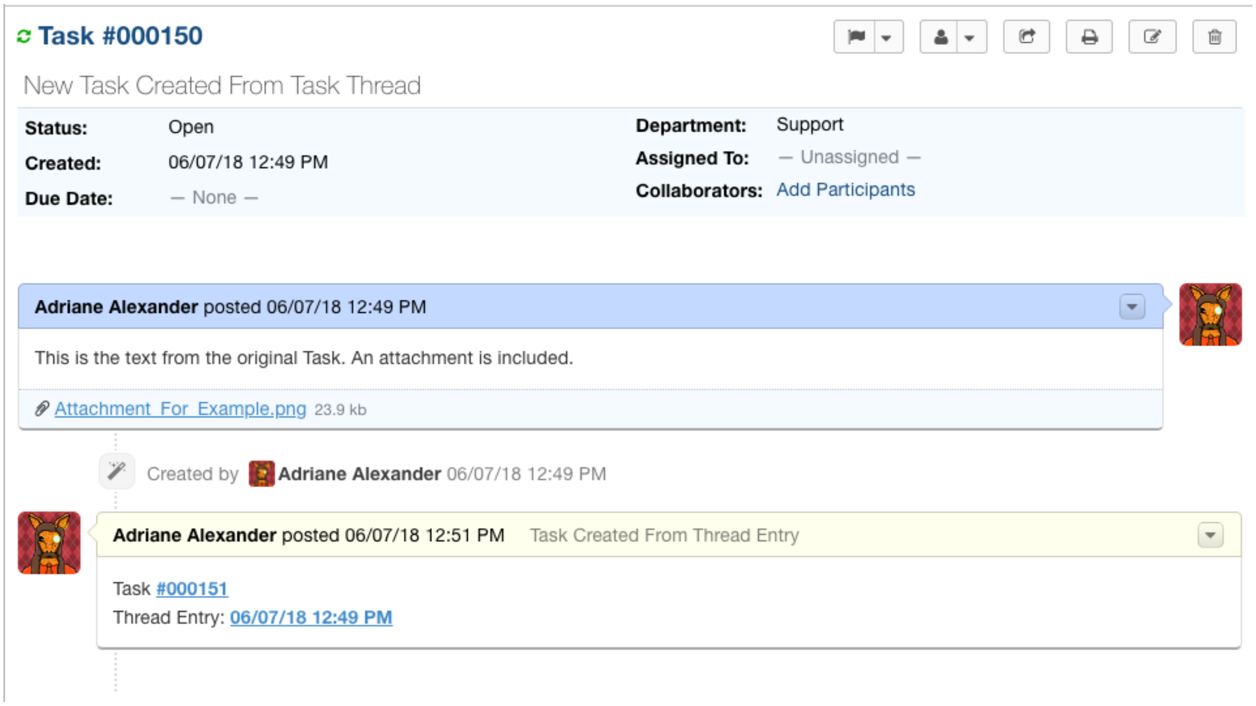


Opening the New Task from the Task Thread Entry:



***Notice:** The attachment from the original Task is carried over into the new Task.

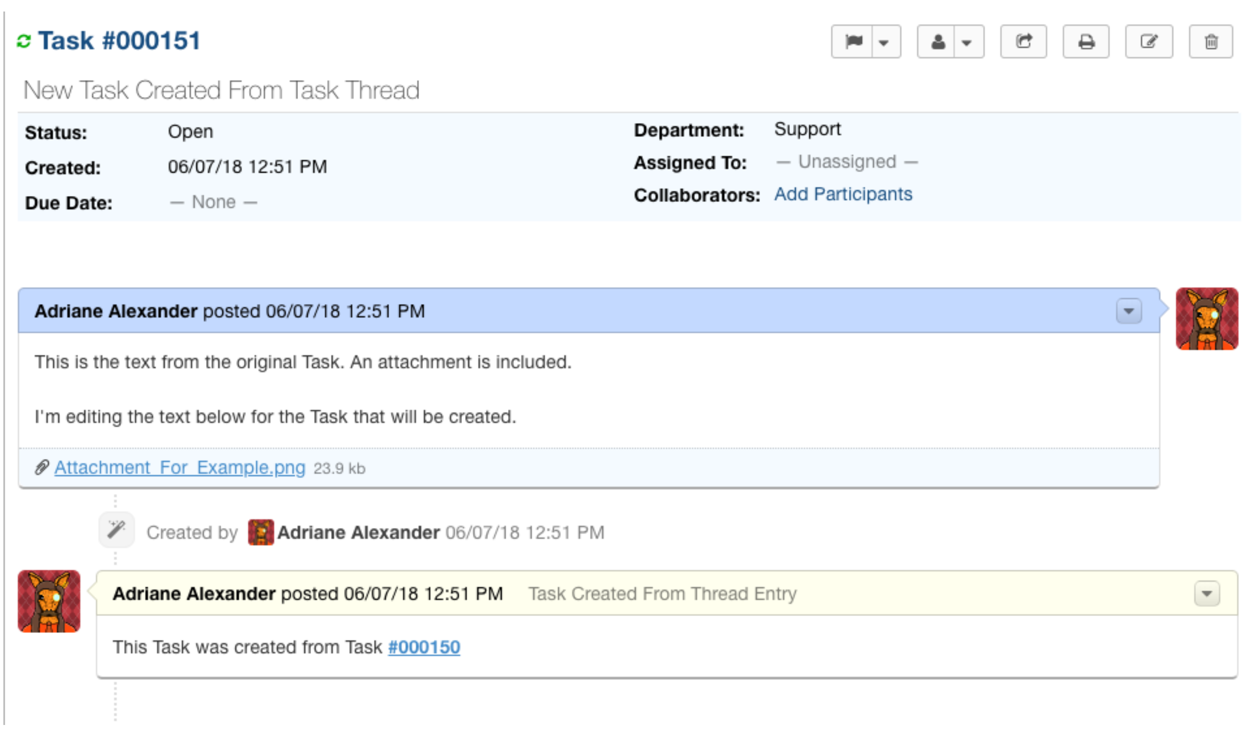
Original Task After:



***Notice:** An Internal Note is added to the original Task referencing the new Task's number as well as the Thread Entry the Task was created from.

Clicking the Task Number will open the new Task that was created. Clicking the Thread Entry will scroll the Task up to the Thread Entry the new Task was created from.

New Task that was created:



***Notice:** An Internal Note is added to the new Task referencing the Task Number the new Task was created from.

Clicking on that reference will open the original Task.

CHAPTER 17

Custom Columns & Custom Queues (Admin)

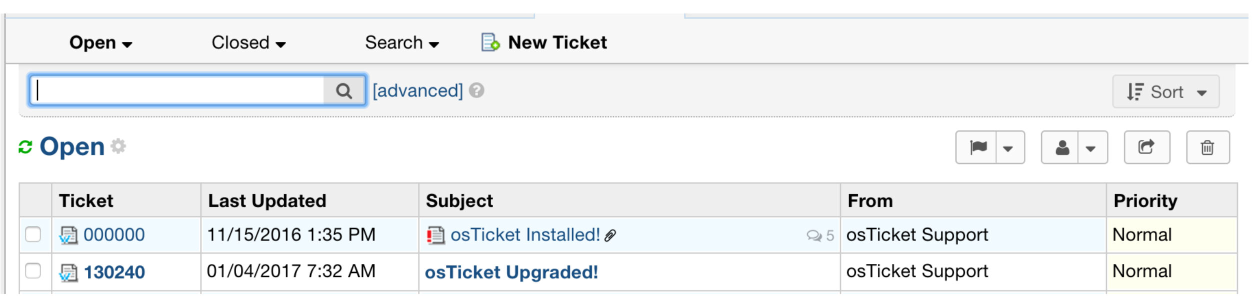
17.1 What is a Custom Queue?

A custom queue is a view of tickets based on a custom criteria that you specify. It allows you to create your own personal views of tickets and specify what information you would like to see.

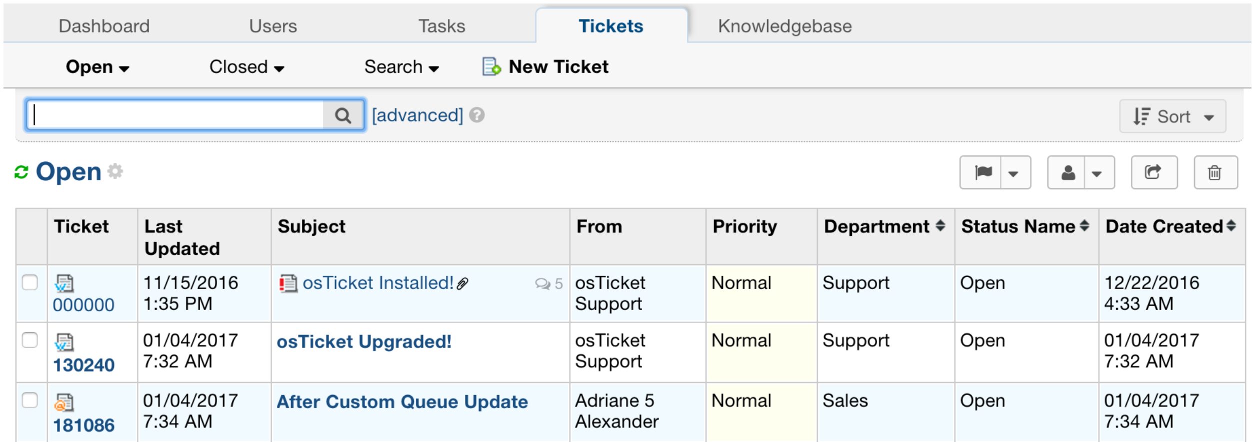
17.2 What is a Custom Column?

A custom column is an additional field that is not displayed initially when viewing the ticket tab. Using custom columns allows you to include these fields in the ticket list.

Before adding custom columns:

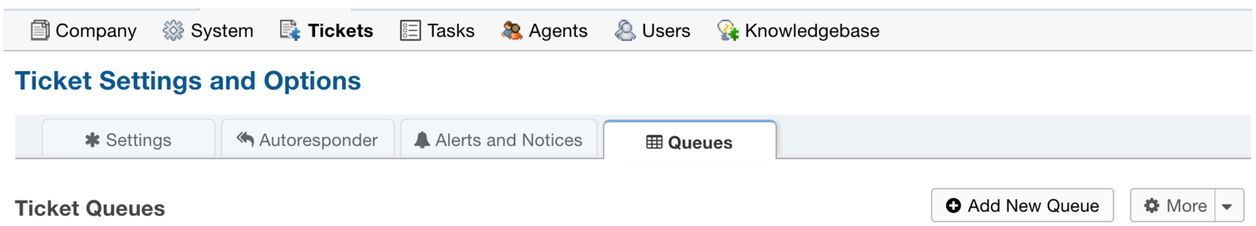


After adding custom columns:

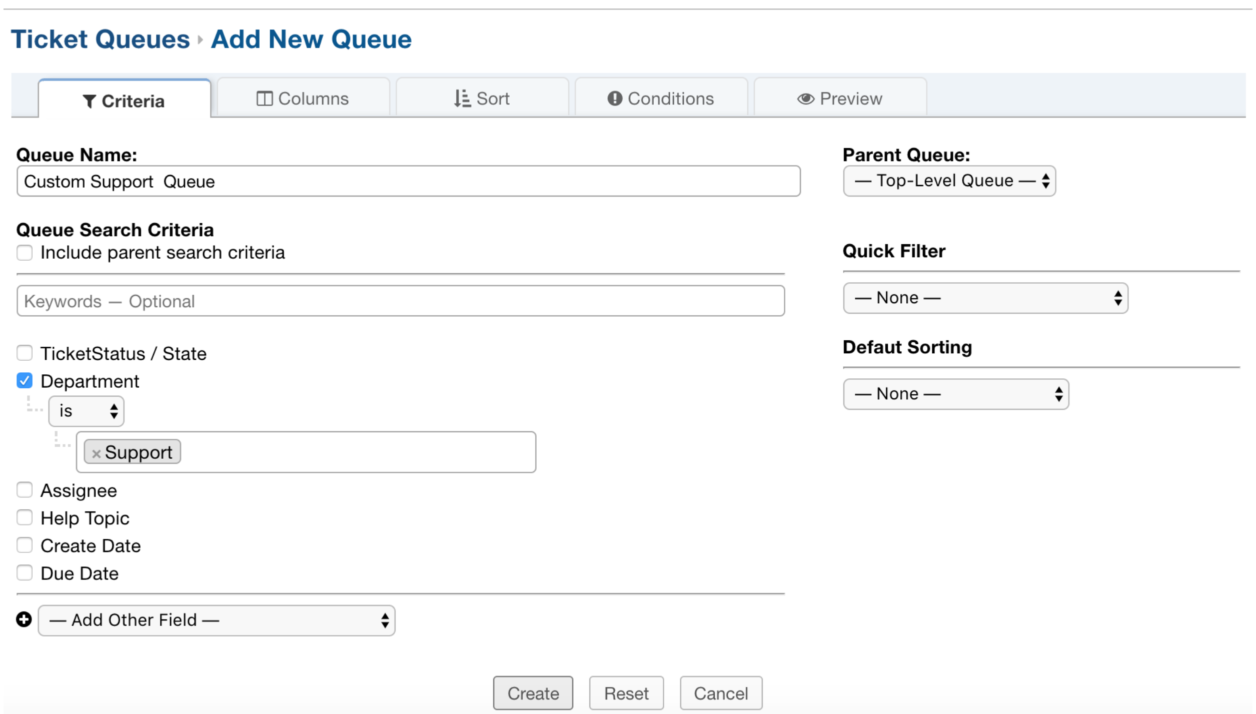


17.3 How can I add a global queue that everyone can see?

Admin Panel | Settings Tab | Tickets | Queues Tab | Add New Queue

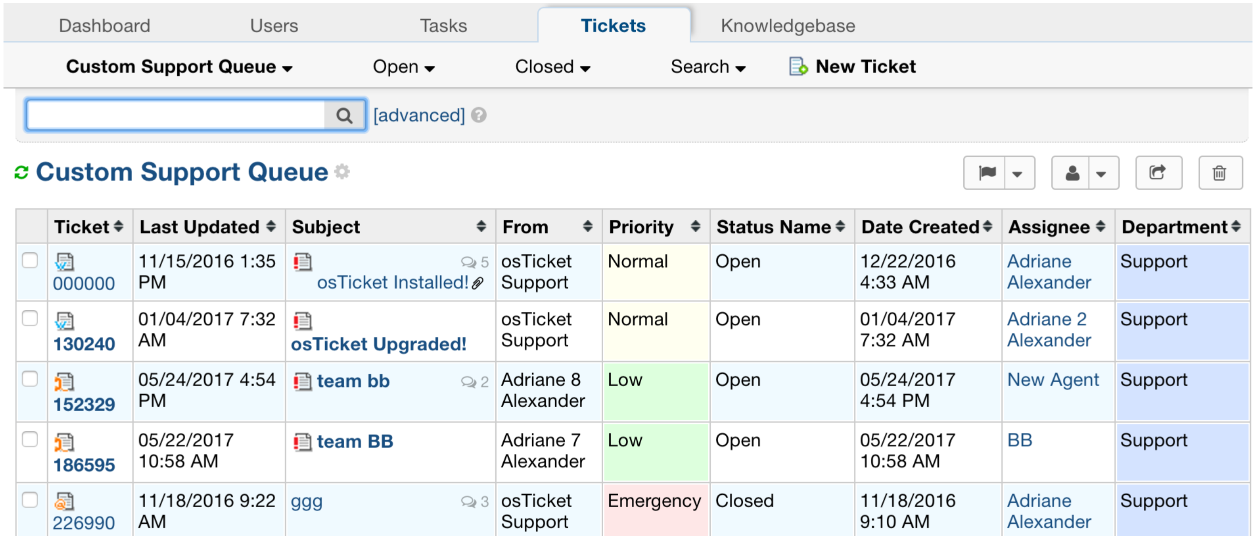


From here, you can configure the new queue by selecting the criteria of tickets for the queue:



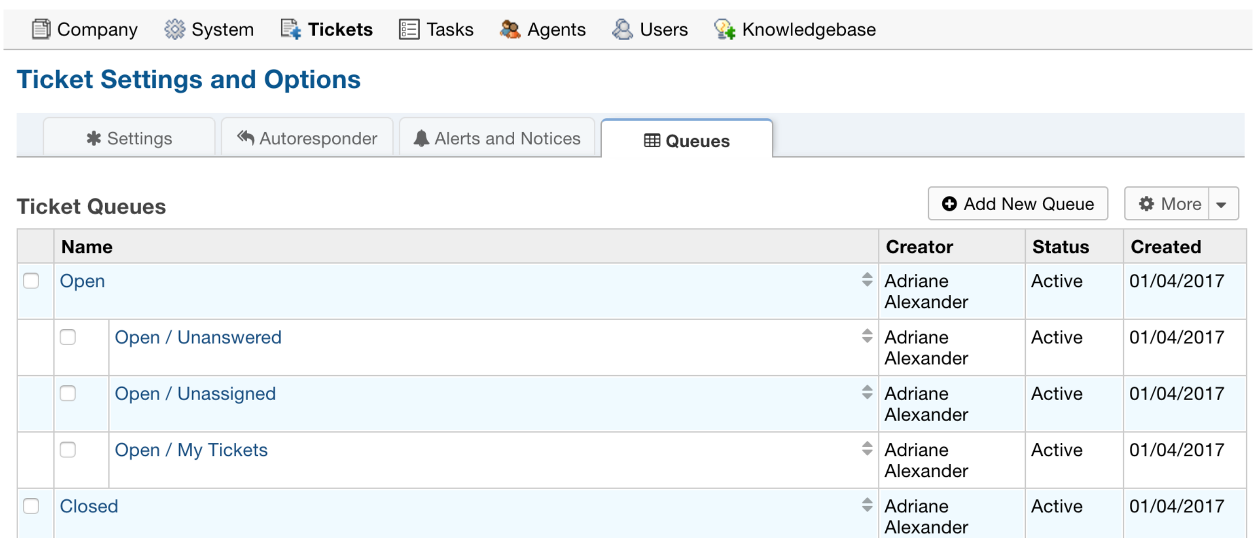
For this example, I chose to create a queue for the Support Department.

Once the queue is created:



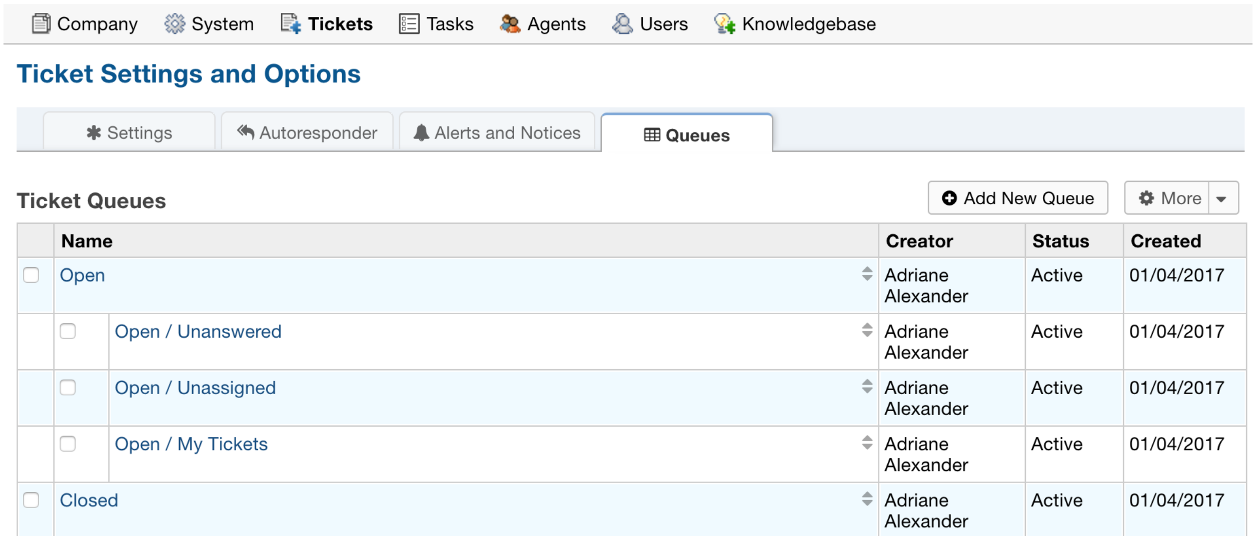
17.4 Where can I edit the default columns and queues?

Admin Panel | Settings | Tickets | Queues

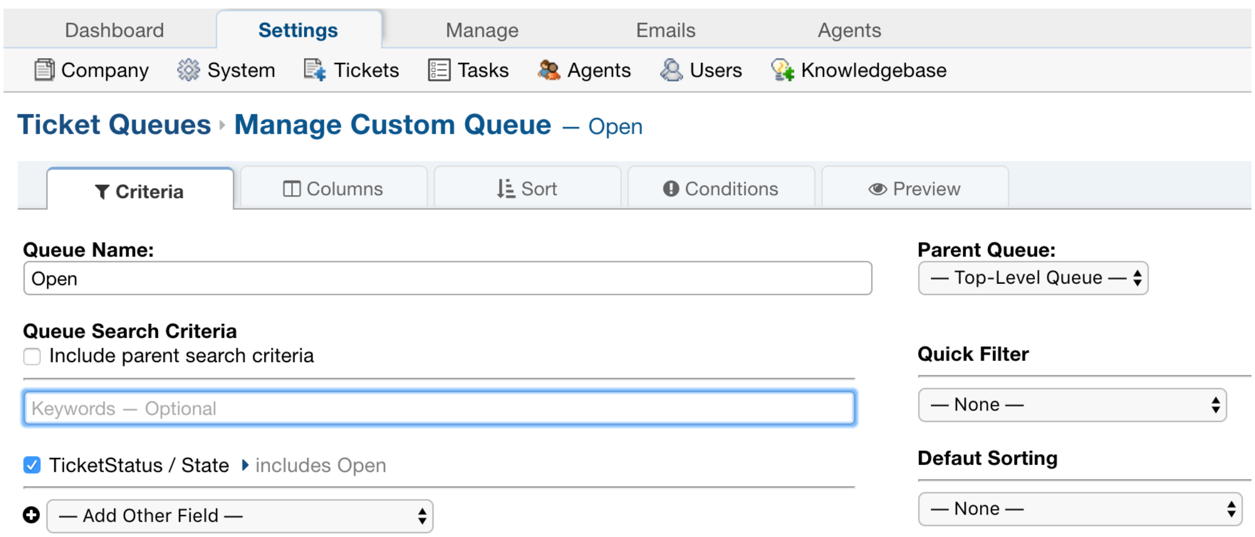


17.5 How do I add more columns to a queue?

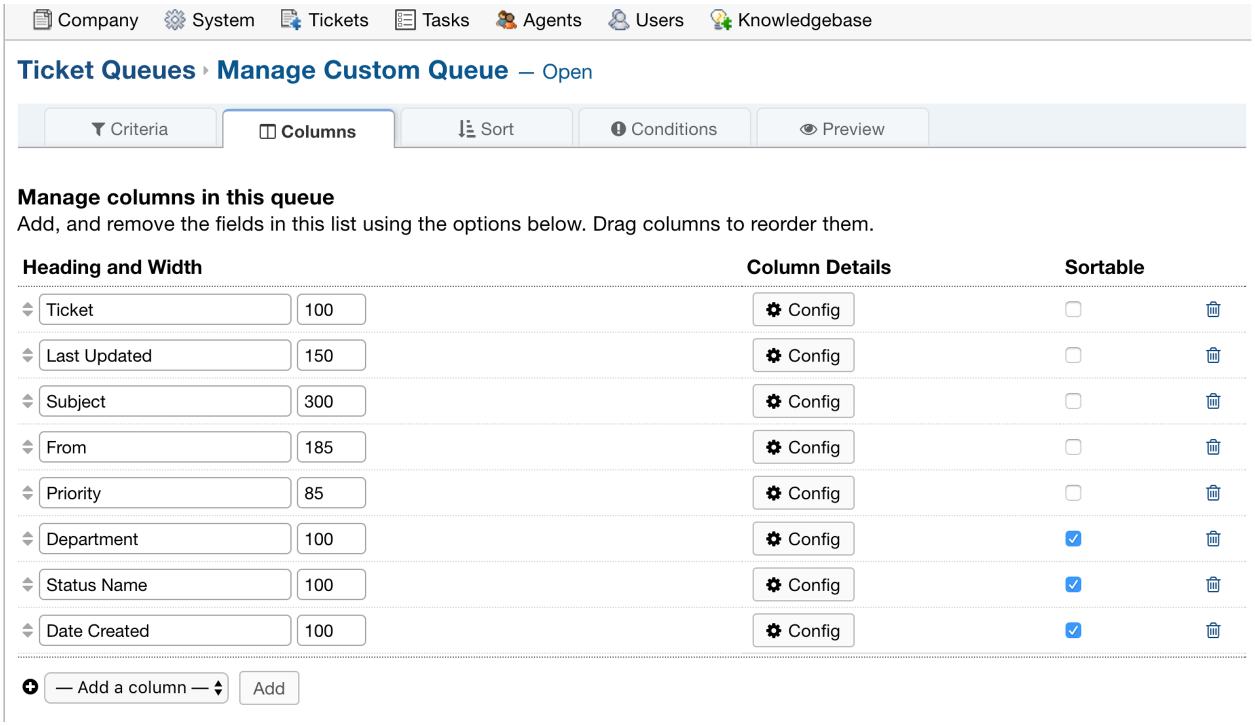
Admin Panel | Settings | Tickets | Queues



From there, you will need to select the queue you want to add columns to. In this example, I will select the Open queue.



Next, you should select the 'Columns' tab.

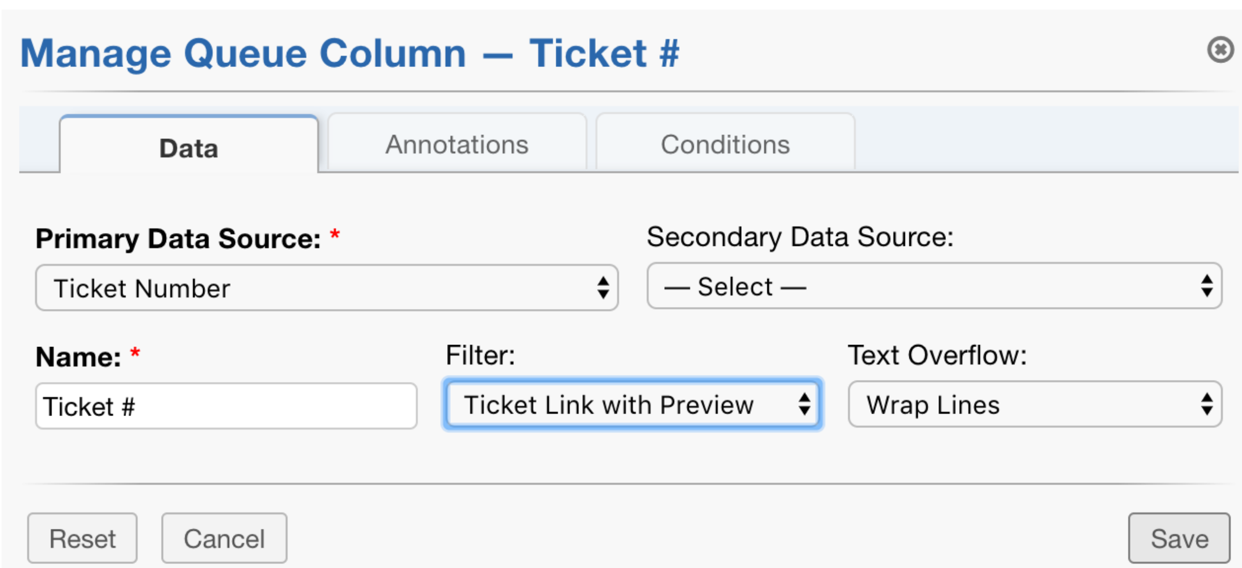


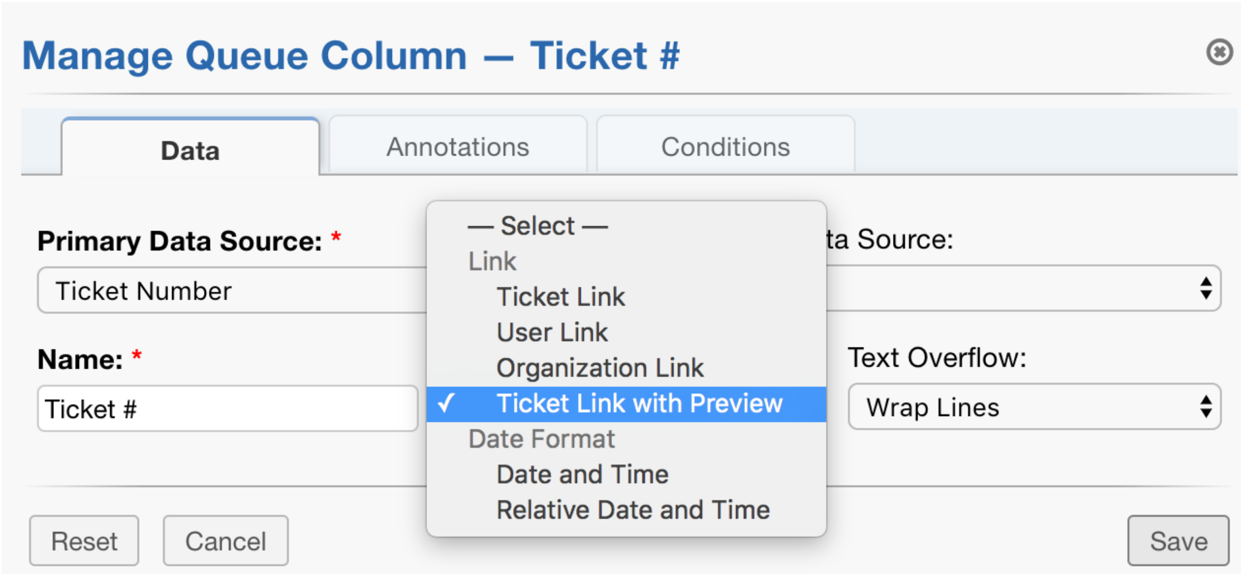
Within the 'Columns' tab, you can select fields to be added as columns, edit the order in which fields show up by dragging the rows, and choose which fields should have the option to be sorted.

Additionally, clicking the 'Config' button beside a field allows you to:

1. Determine how ticket data is displayed

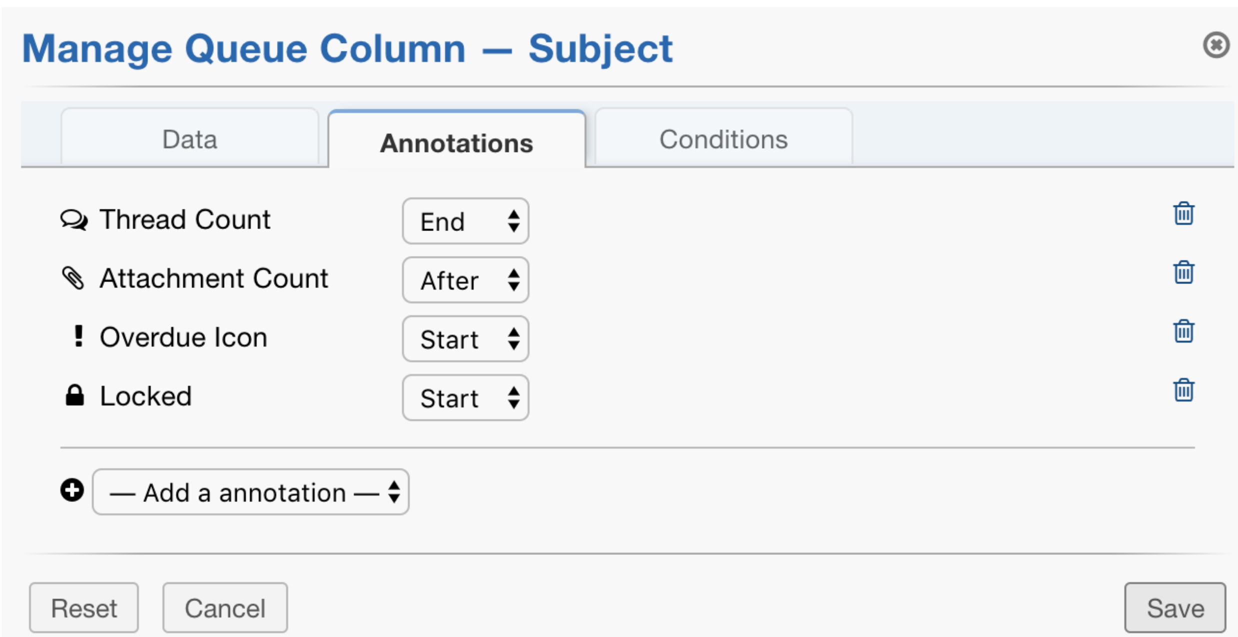
For example, what is shown when hovering over a link or what format dates display as.



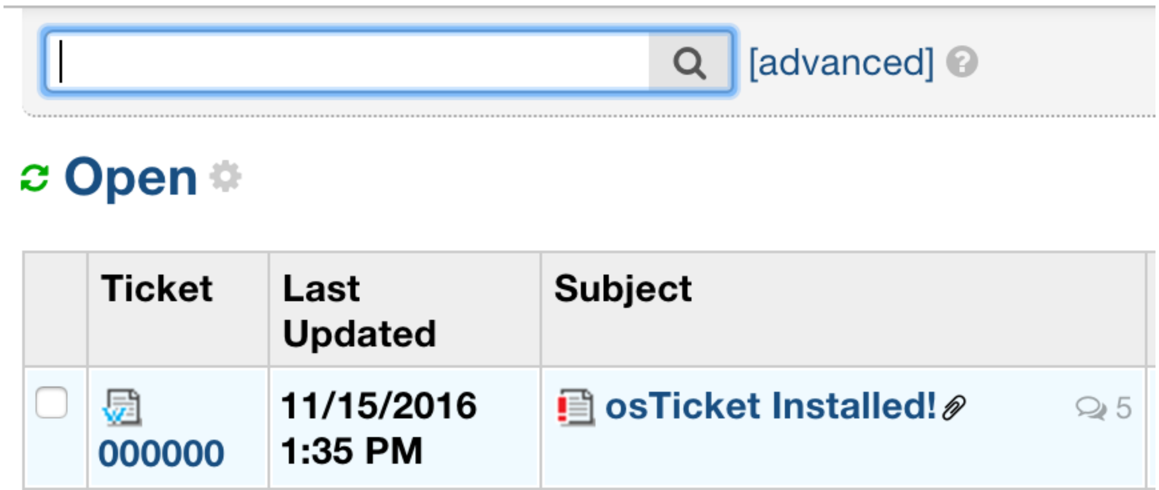


Note: Primary and Secondary Data Source refer to the field's data that will show up in a column. Secondary Data Source allows you to choose an alternative field's data to display if the Primary Data Source is not populated.

2. Add an annotation to show up beside specified fields

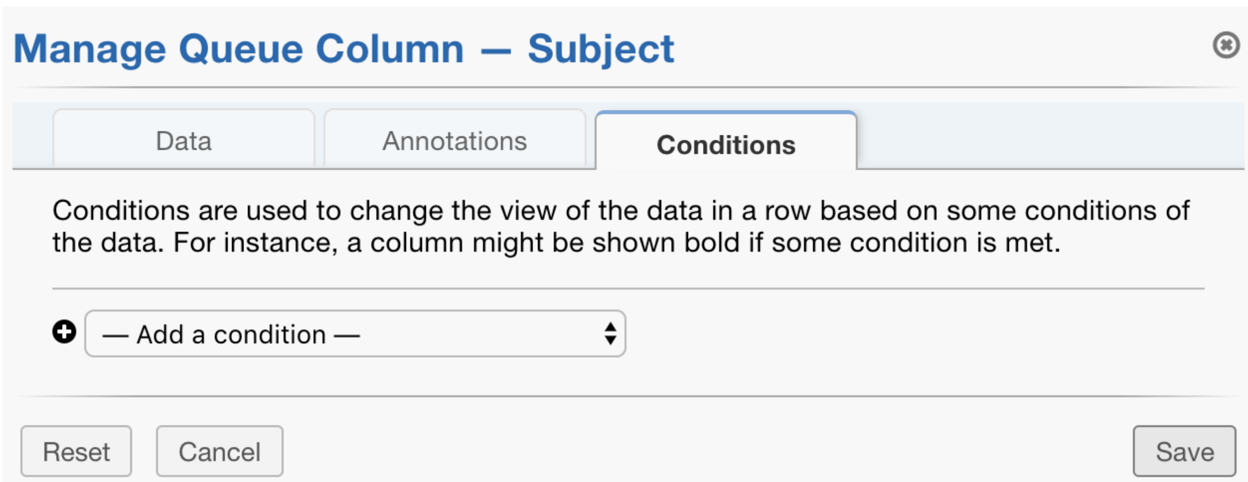


An annotation is a small icon that represents more information about a field. For example, the annotation for thread count displays as a chat icon with the number of responses included on a ticket

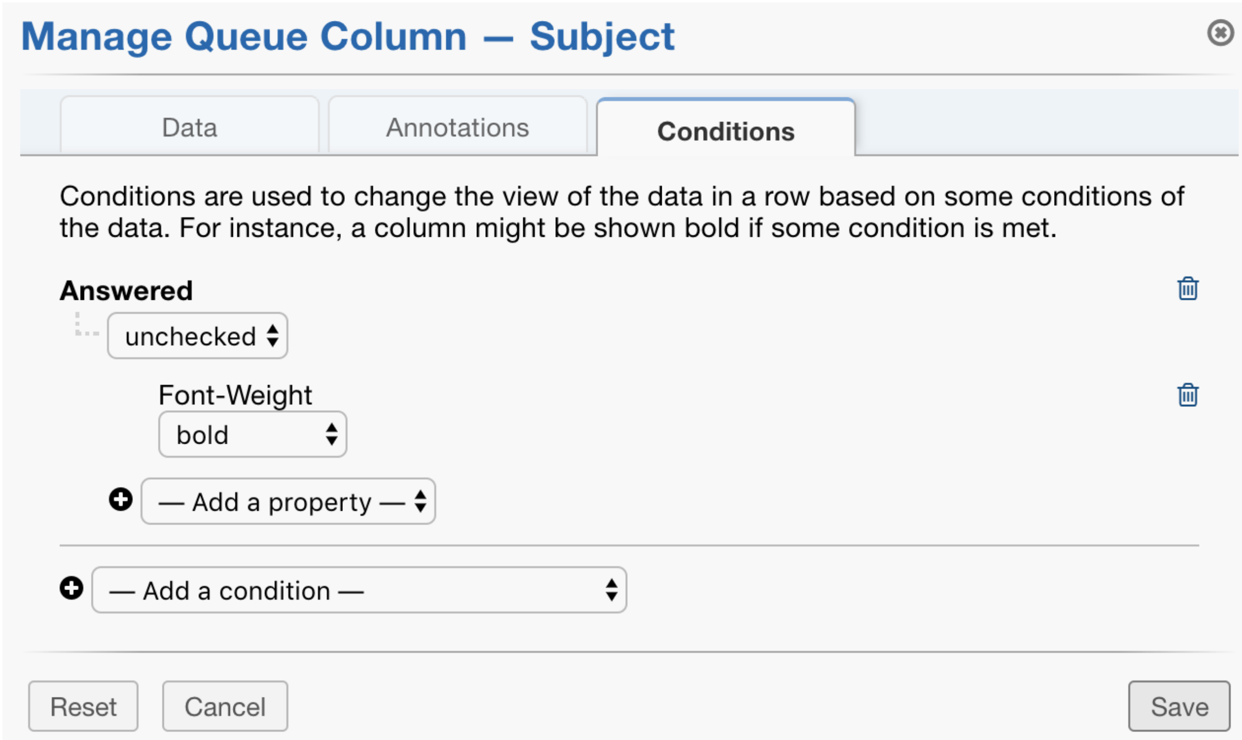


3. Add (or modify) conditional styling

Add

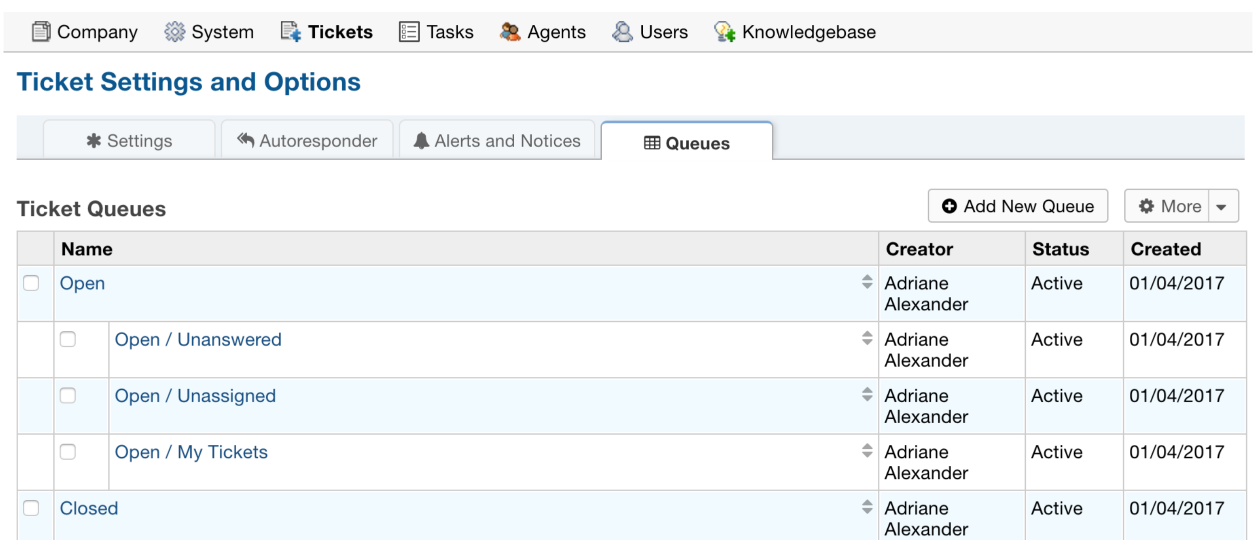


Modify

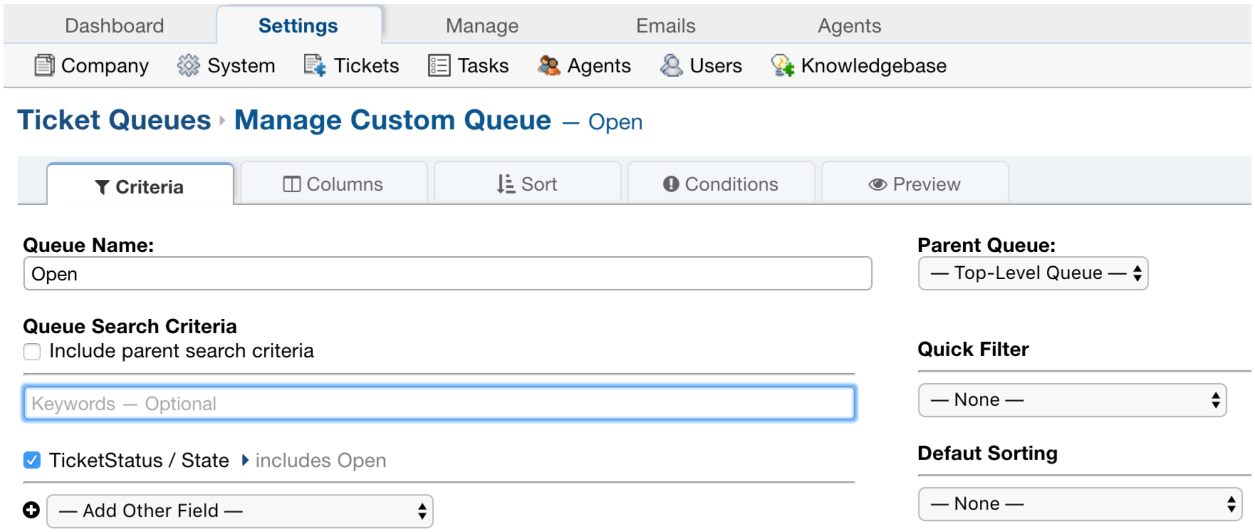


17.6 Do custom queues support conditional styling?

There is a feature to add style to queues. These settings can be found by going to: Admin Panel | Settings | Tickets | Queues

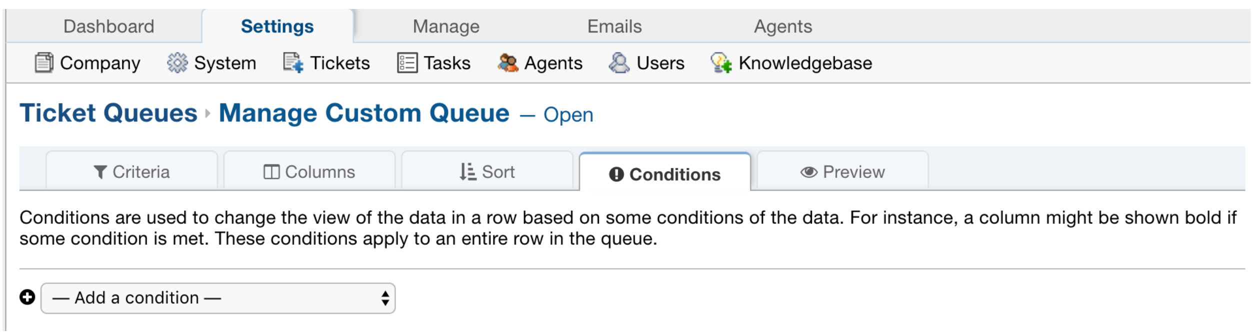


From there, you will need to select the queue you want to add conditional styling to. In this example, I will select the Open queue.

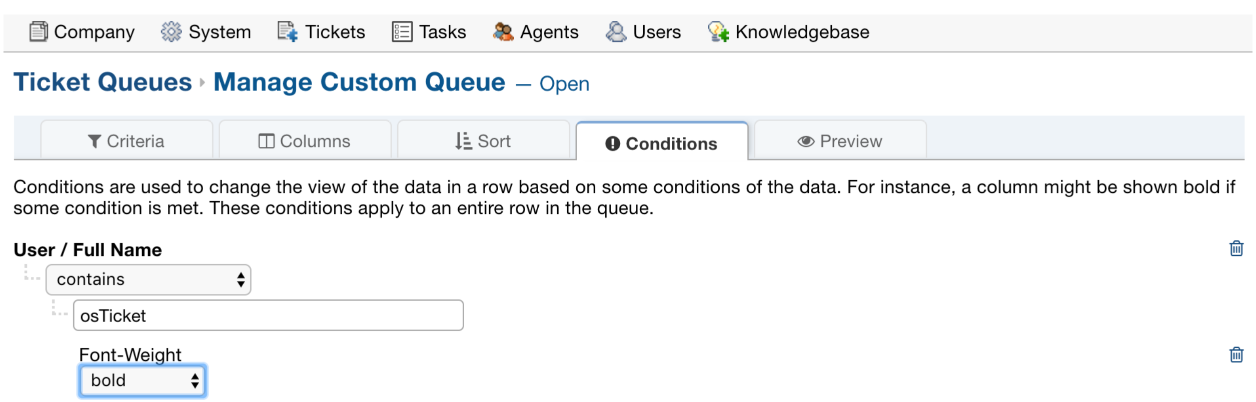


Once you select a queue, you should select the 'Conditions' tab where you are able to specify what styling you want and under which criteria. Many options are included to manipulate the color, font style, and text of ticket records.

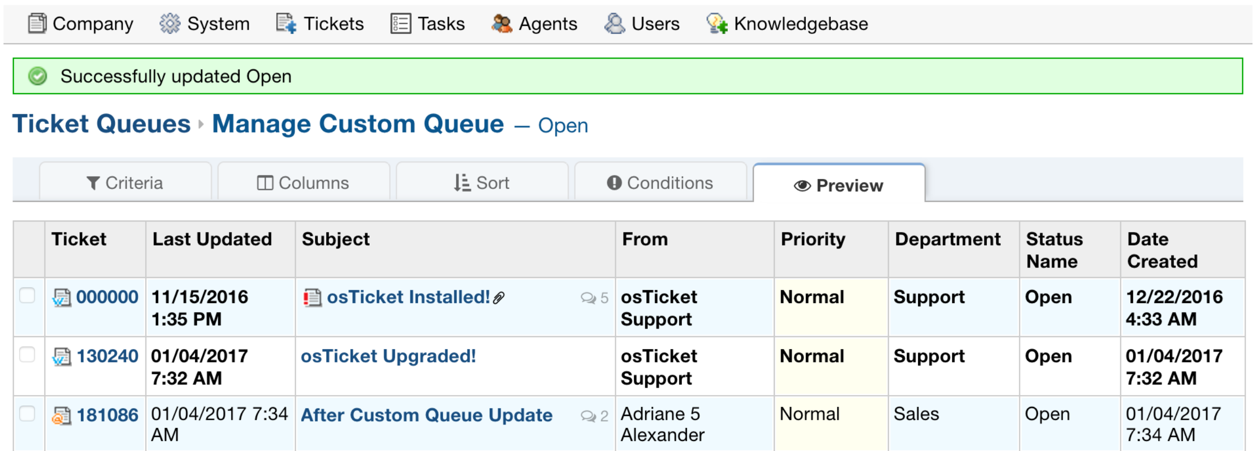
Before Adding Conditions:



After adding conditions:

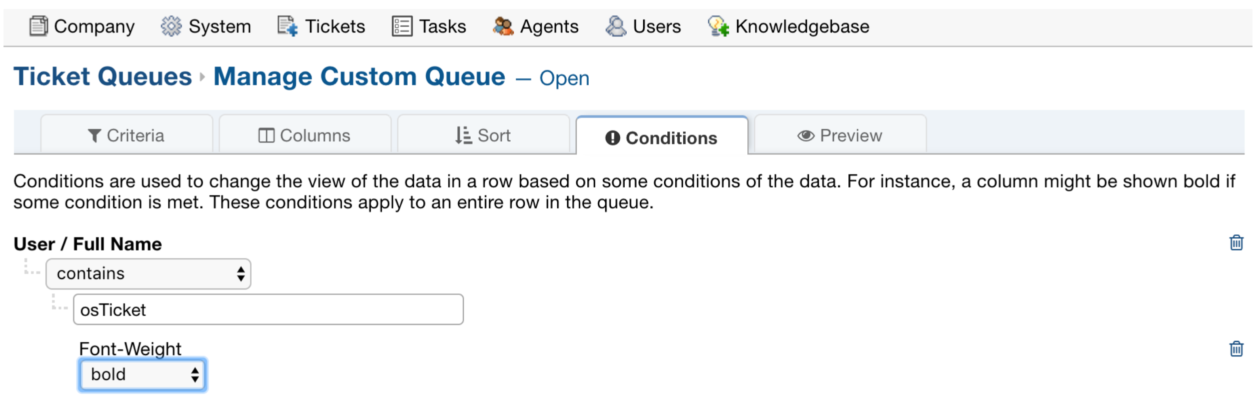


Once you save a style, you can click the preview tab to see how it looks.

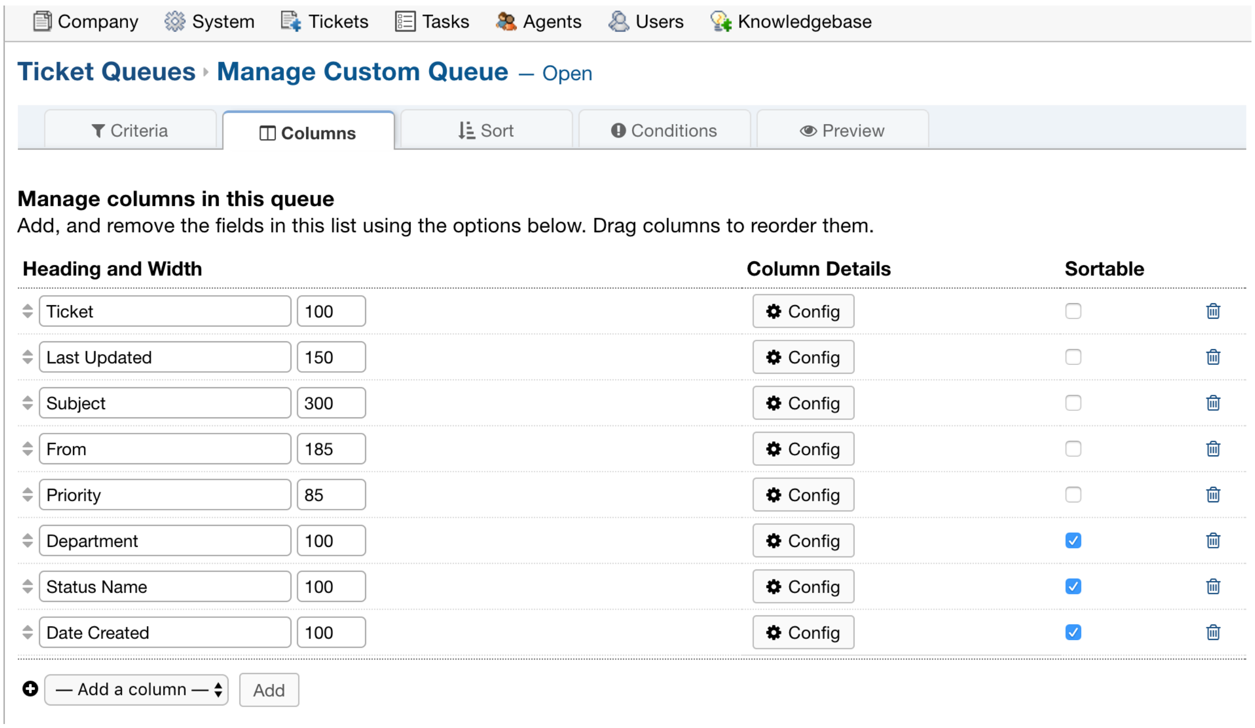


Adding conditions this way will apply the style to the whole row, as shown above.

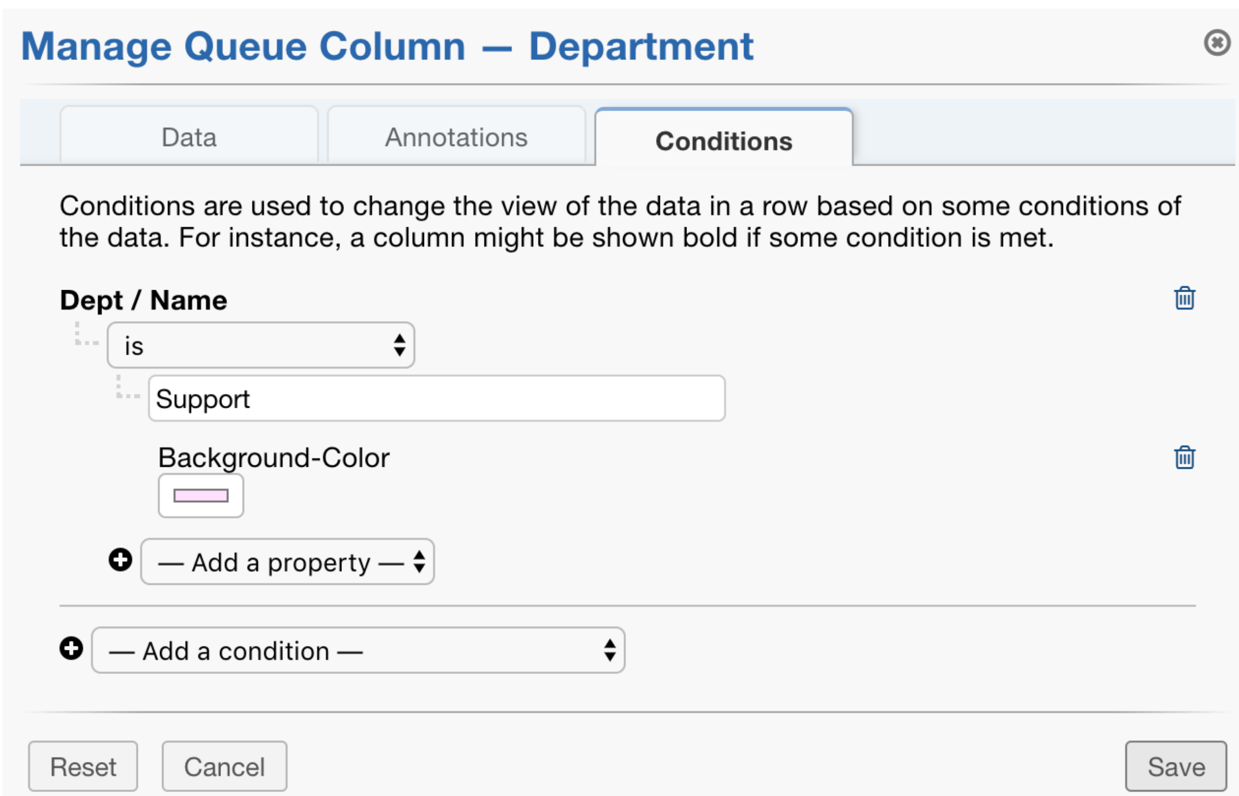
If you decide that you want to discard the styling, you can do so by clicking the trash can beside the style.



Additionally, you can add conditional styling to only one field specified. To do this, select the Columns tab within the queue you are adding style to.

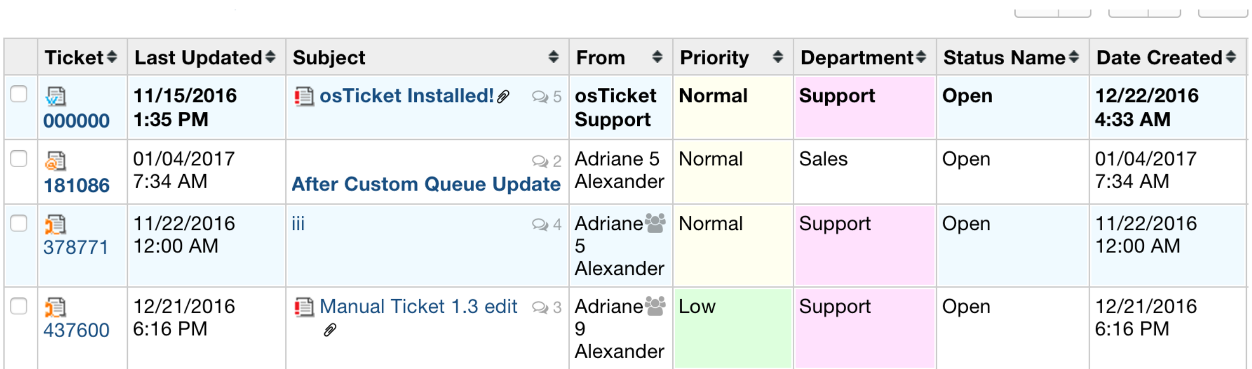


Click the 'Config' button for the column to add style to it and then select the 'Conditions' tab.



In this example, I have chosen to add a background color to Departments with the name 'Support'

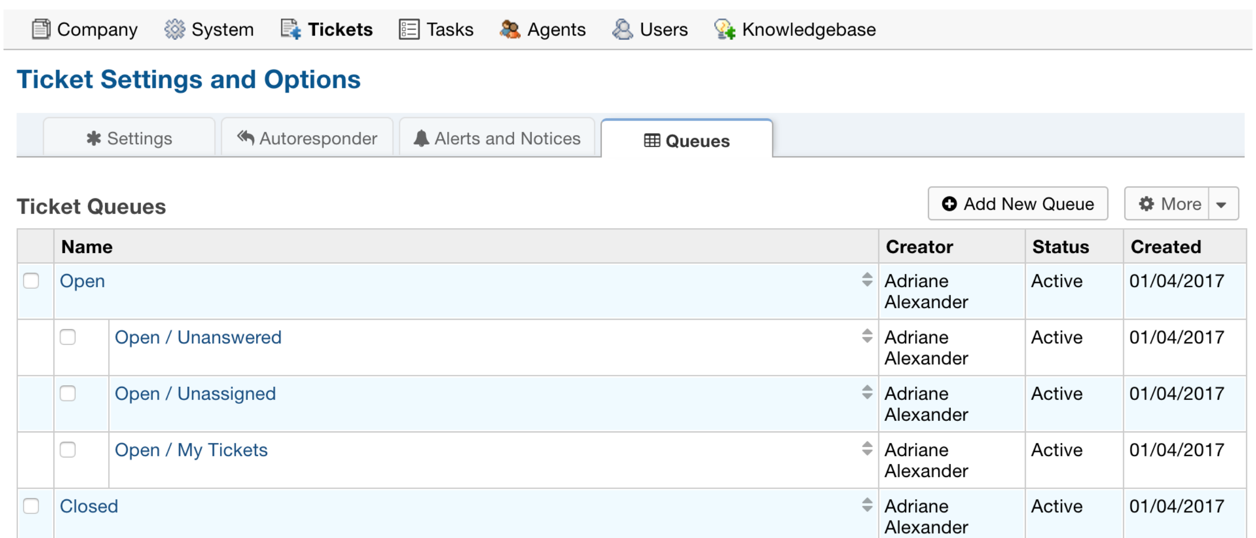
Once saved, tickets where the Department is 'Support' will have the style added to only the Department column.



	Ticket	Last Updated	Subject	From	Priority	Department	Status Name	Date Created
	000000	11/15/2016 1:35 PM	osTicket Installed! 5	osTicket Support	Normal	Support	Open	12/22/2016 4:33 AM
	181086	01/04/2017 7:34 AM	2 After Custom Queue Update	Adriane 5 Alexander	Normal	Sales	Open	01/04/2017 7:34 AM
	378771	11/22/2016 12:00 AM	iii 4	Adriane 5 Alexander	Normal	Support	Open	11/22/2016 12:00 AM
	437600	12/21/2016 6:16 PM	Manual Ticket 1.3 edit 3	Adriane 9 Alexander	Low	Support	Open	12/21/2016 6:16 PM

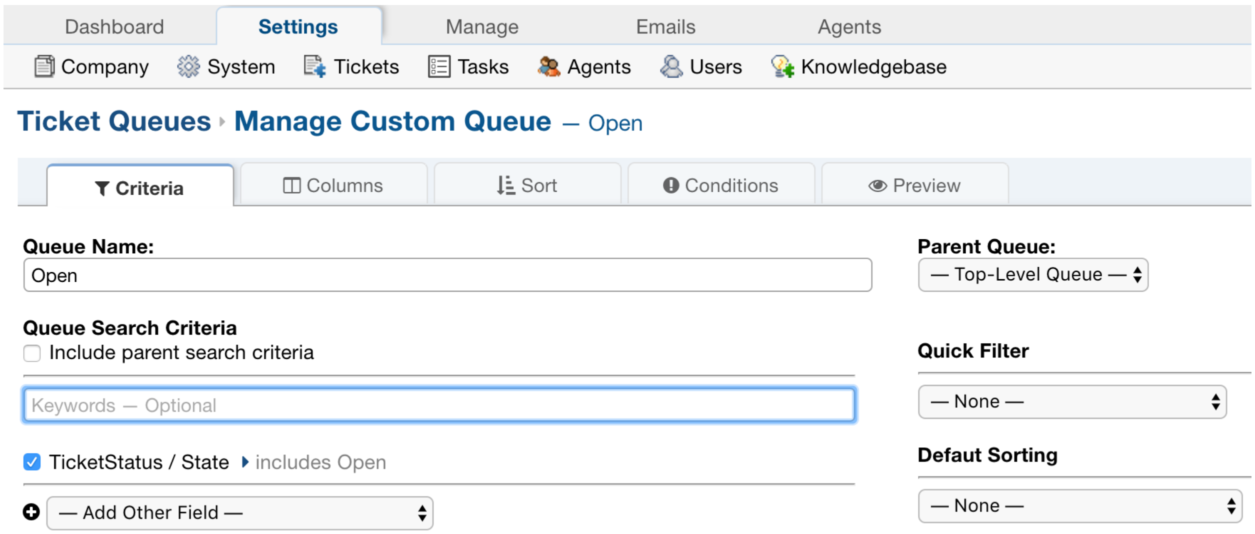
17.7 How can I customize how tickets are sorted in queues?

Sorting options can be found by going to: Admin Panel | Settings | Tickets | Queues



	Name	Creator	Status	Created
	Open	Adriane Alexander	Active	01/04/2017
	Open / Unanswered	Adriane Alexander	Active	01/04/2017
	Open / Unassigned	Adriane Alexander	Active	01/04/2017
	Open / My Tickets	Adriane Alexander	Active	01/04/2017
	Closed	Adriane Alexander	Active	01/04/2017

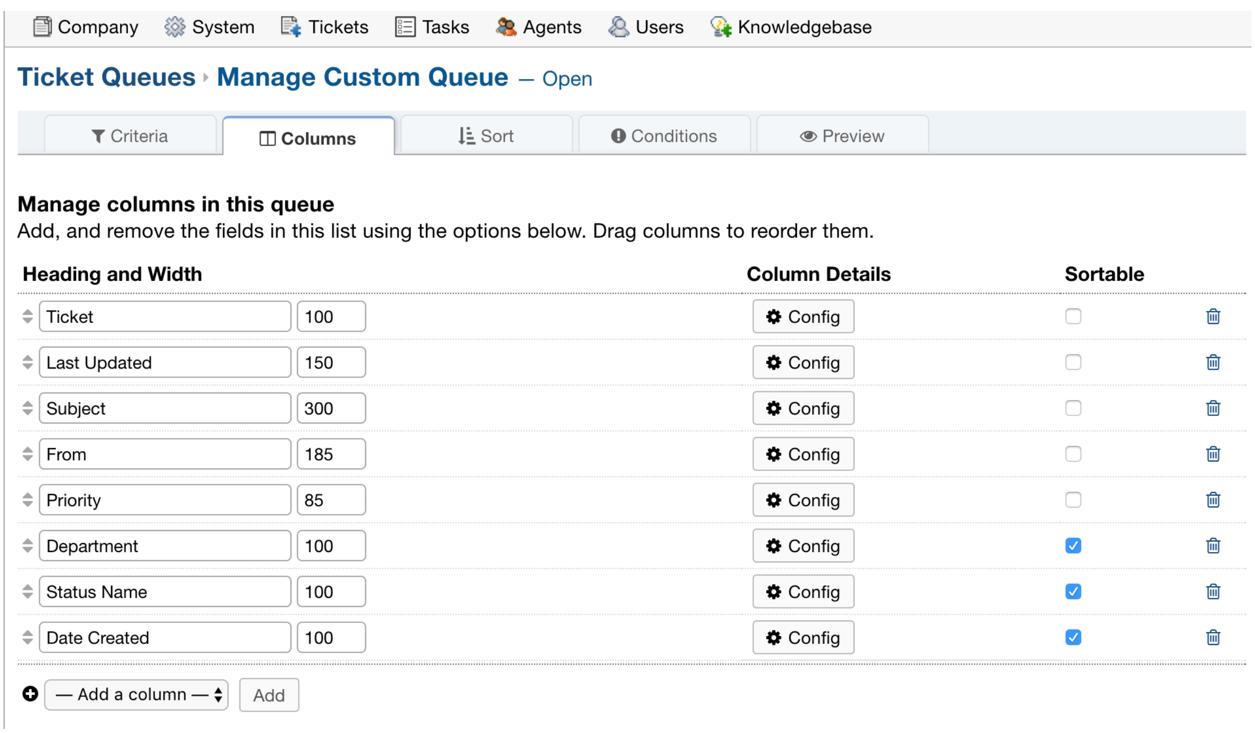
From there, you will need to select the queue you want to add column sorting to. In this example, I have selected the Open queue.



There are two ways to control how tickets are sorted, and both options can be found from this menu.

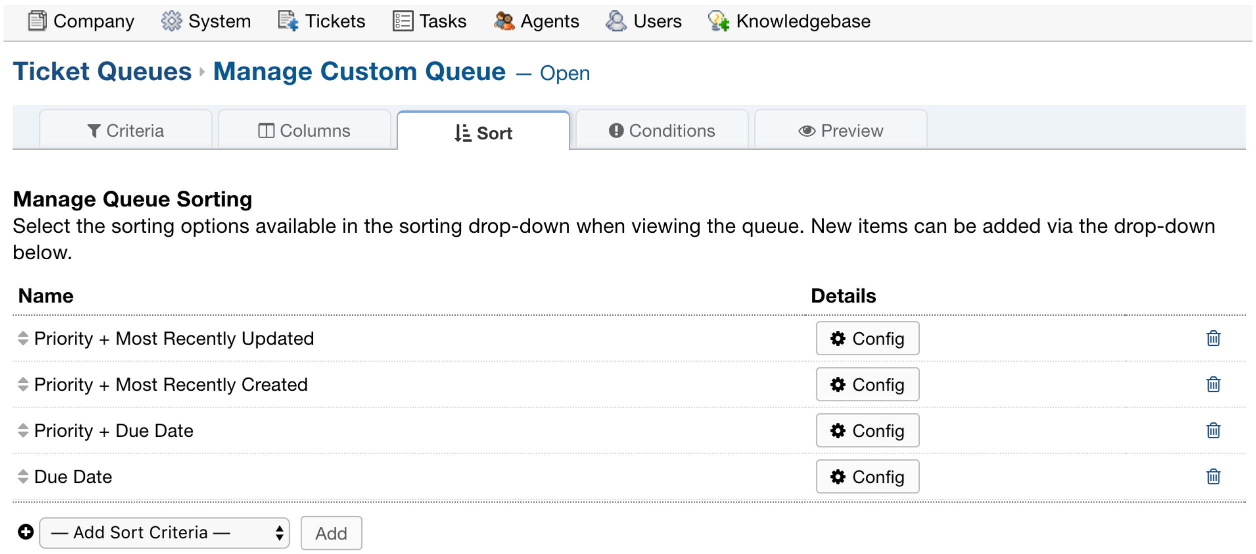
1. By enabling column sort which will let you sort by a column that is clicked

Selecting the 'Columns' tab lets you specify which columns should be sortable by placing a check in the sortable box.

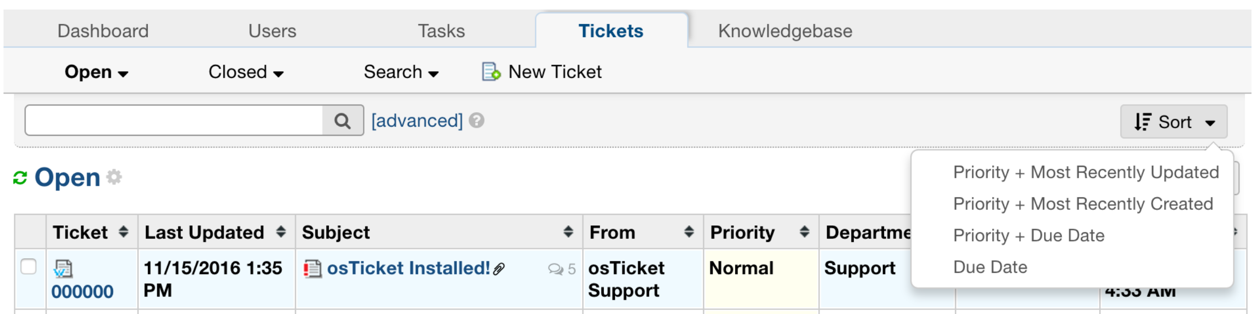


2. Specifying the dropdown sort options. These settings can be found by going to:

Selecting the 'Sort' tab allows you to specify what sort filters you would like to see in the sort dropdown.

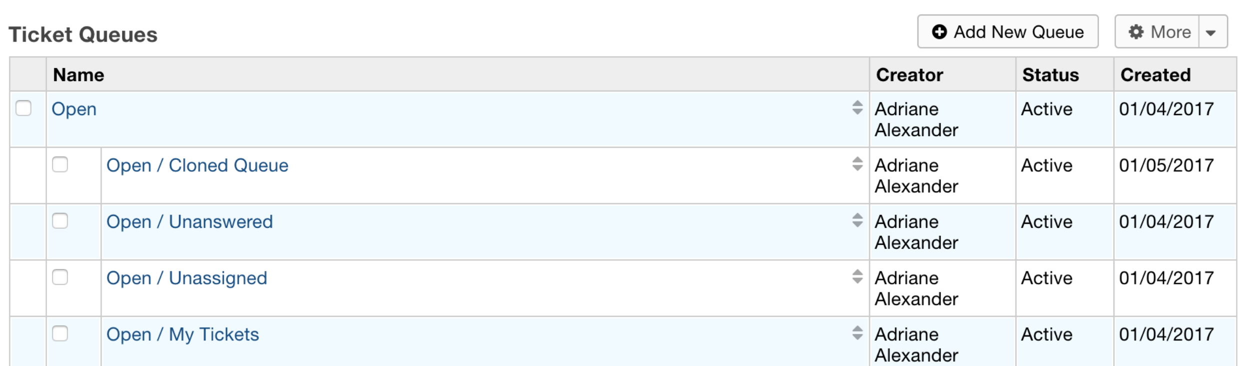


Once saved, you can see your filters by going to tickets and clicking on the Sort dropdown

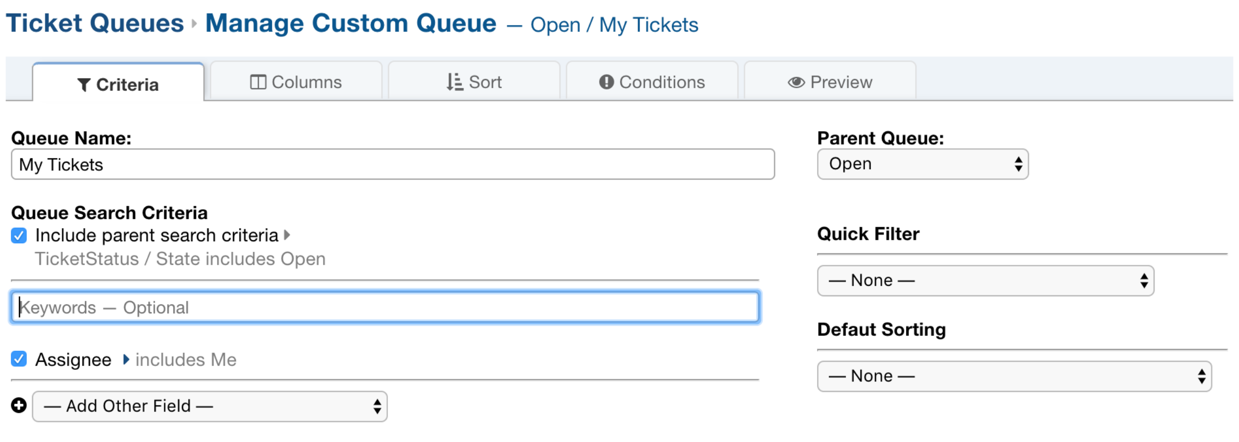


17.8 What is the Parent Queue?

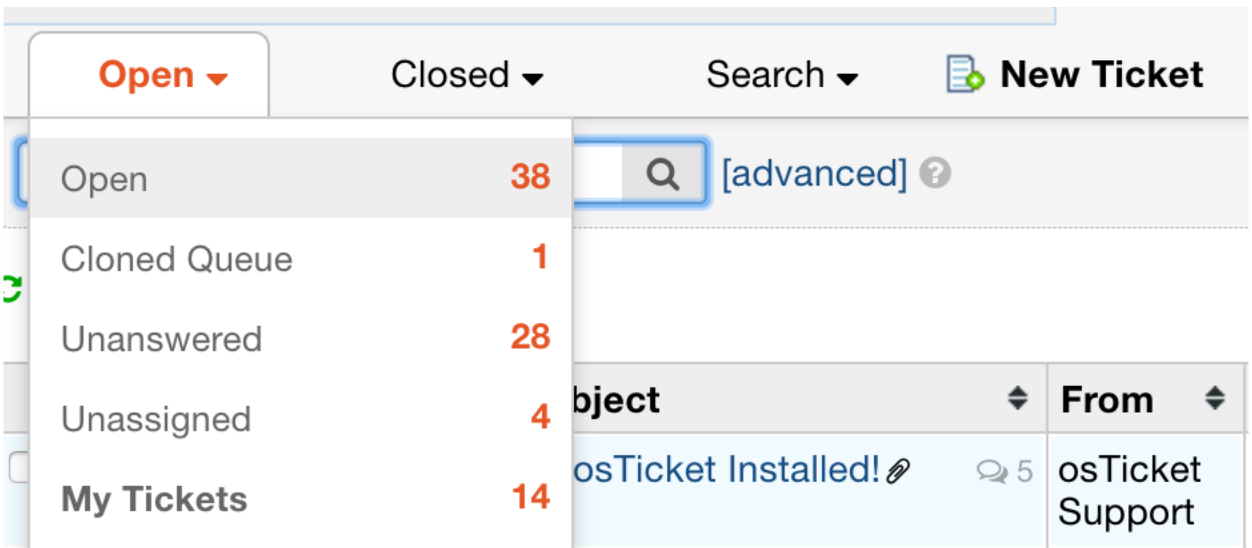
The parent queue is used to determine which column a queue falls under.



In this example, Cloned Queue, Unanswered, Unassigned, and My Tickets have 'Open' as the Parent Queue.

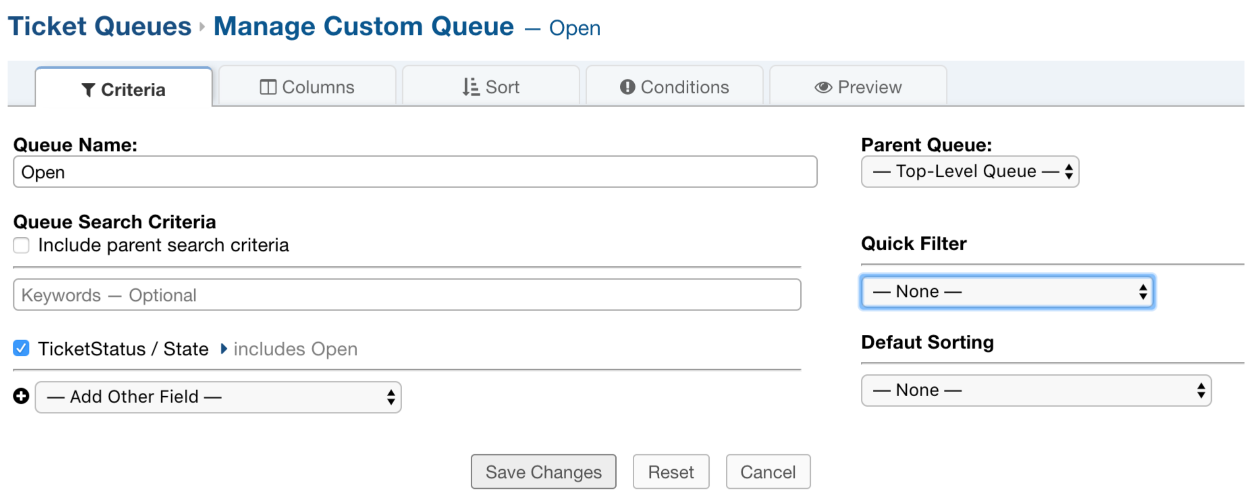


When viewing the 'Open' tab, each of these queues are visible.

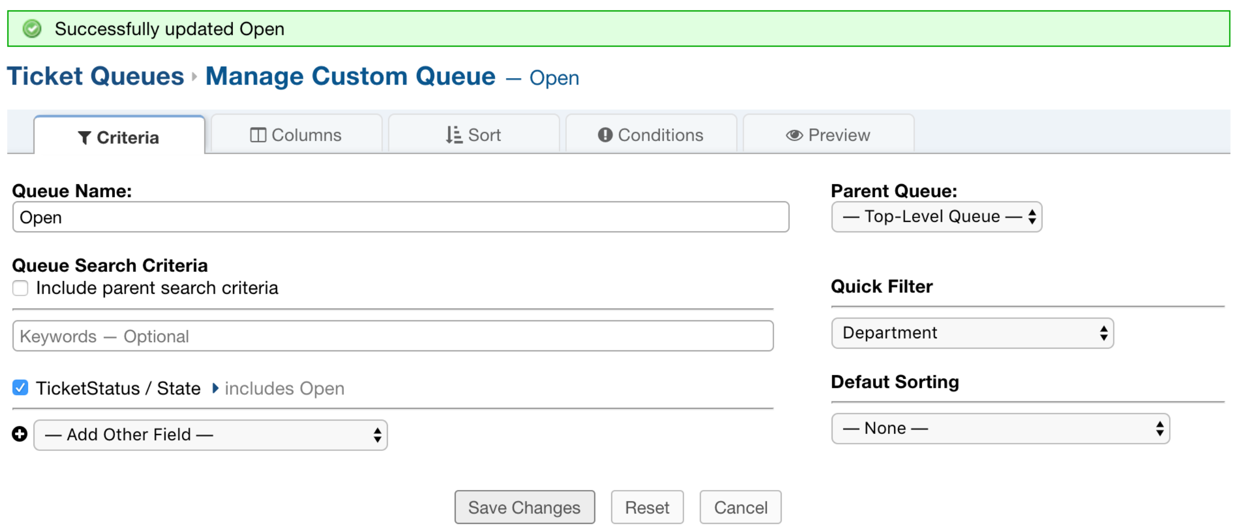


17.9 What are Quick Filters?

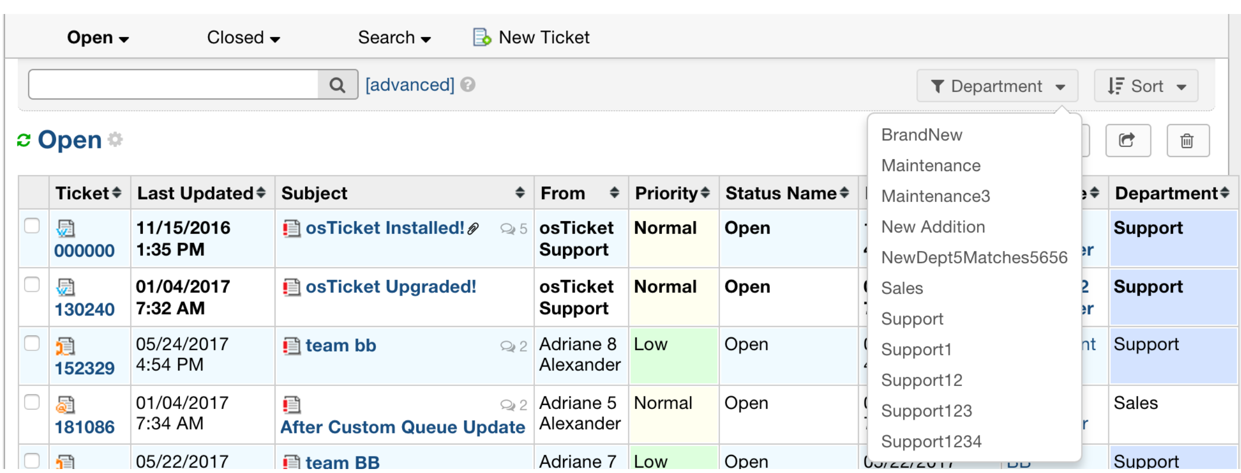
When editing a queue, there is an option to add a Quick Filter. This adds an option at the top of the page to quickly filter by a specified field.



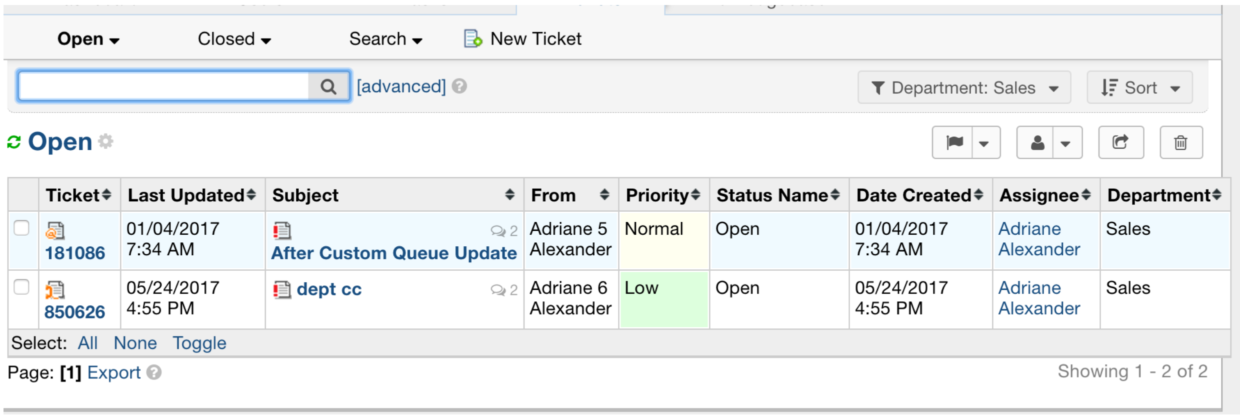
In this example, I will add a quick filter for the Department.



Now, when I view the Open Tickets queue, I can filter tickets by each Department I have access to.

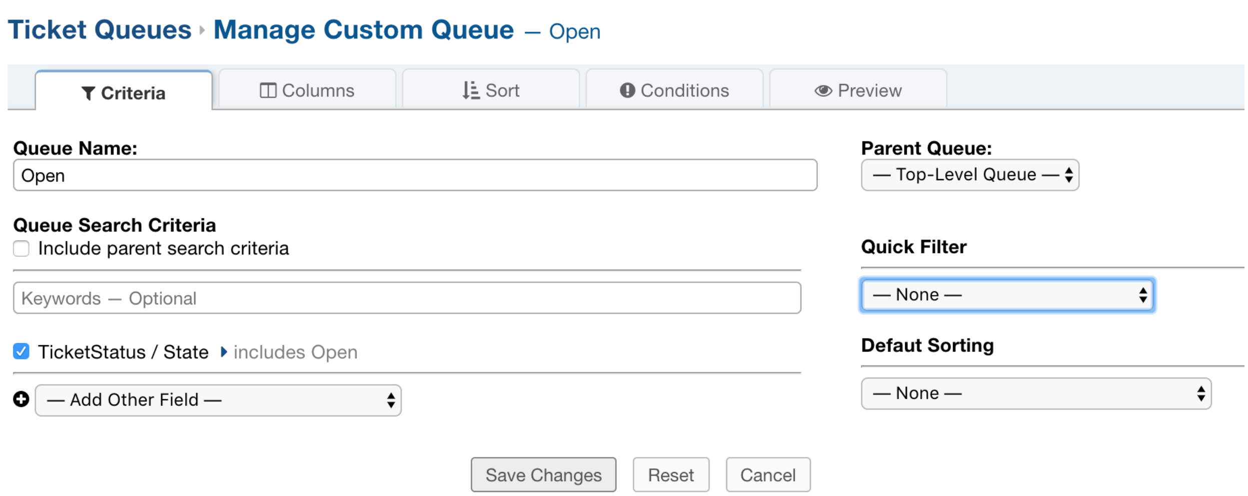


If I click on 'Sales', only tickets in that Department will be shown.

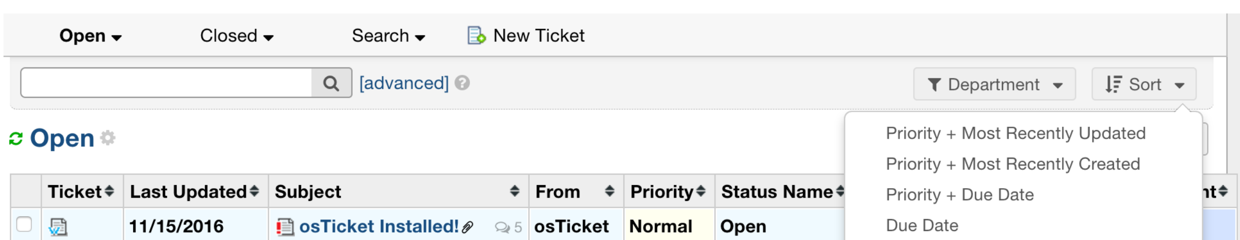


17.10 What does the Default Sorting option do?

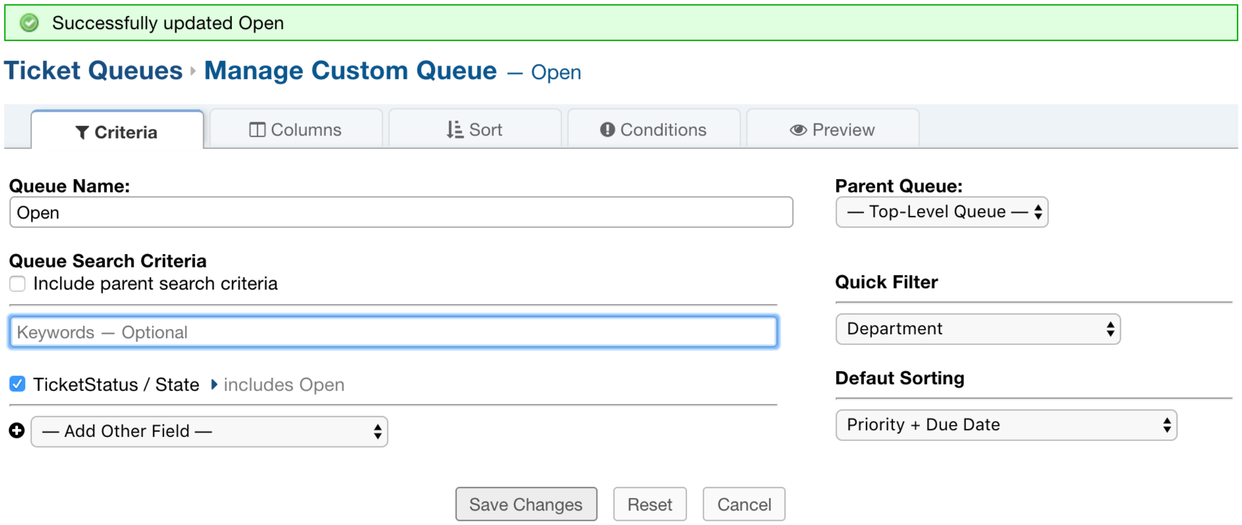
When editing a queue, there is an option to choose the Default Sorting. This automatically chooses which sorting option agents will see by default.



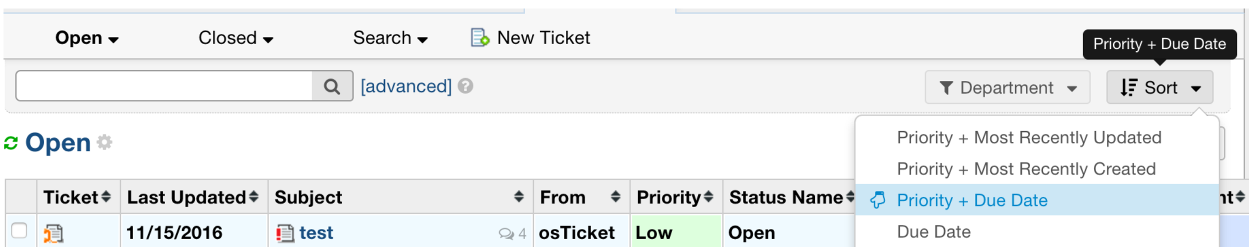
By default, no sort is chosen.



Update sort:



Once changed:



CHAPTER 18

Custom Columns & Custom Queues (Agent)

18.1 What is a Custom Queue?

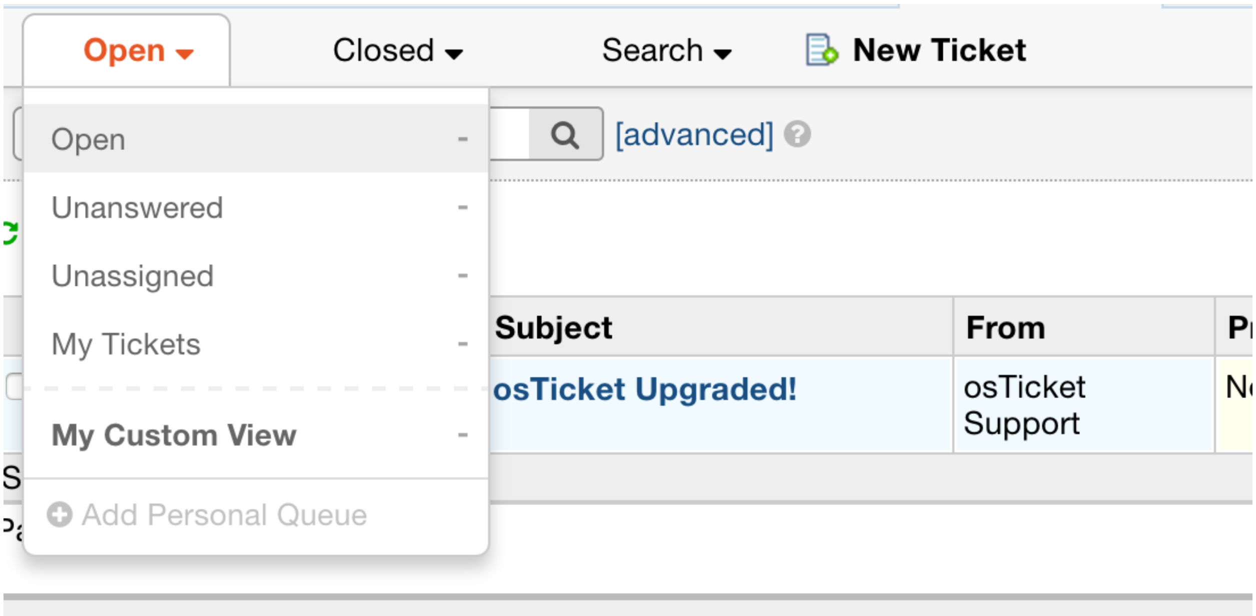
A custom queue is a view of tickets based on a custom criteria that you specify. It allows you to create your own personal views of tickets and specify what information you would like to see.

18.2 What is a Custom Column?

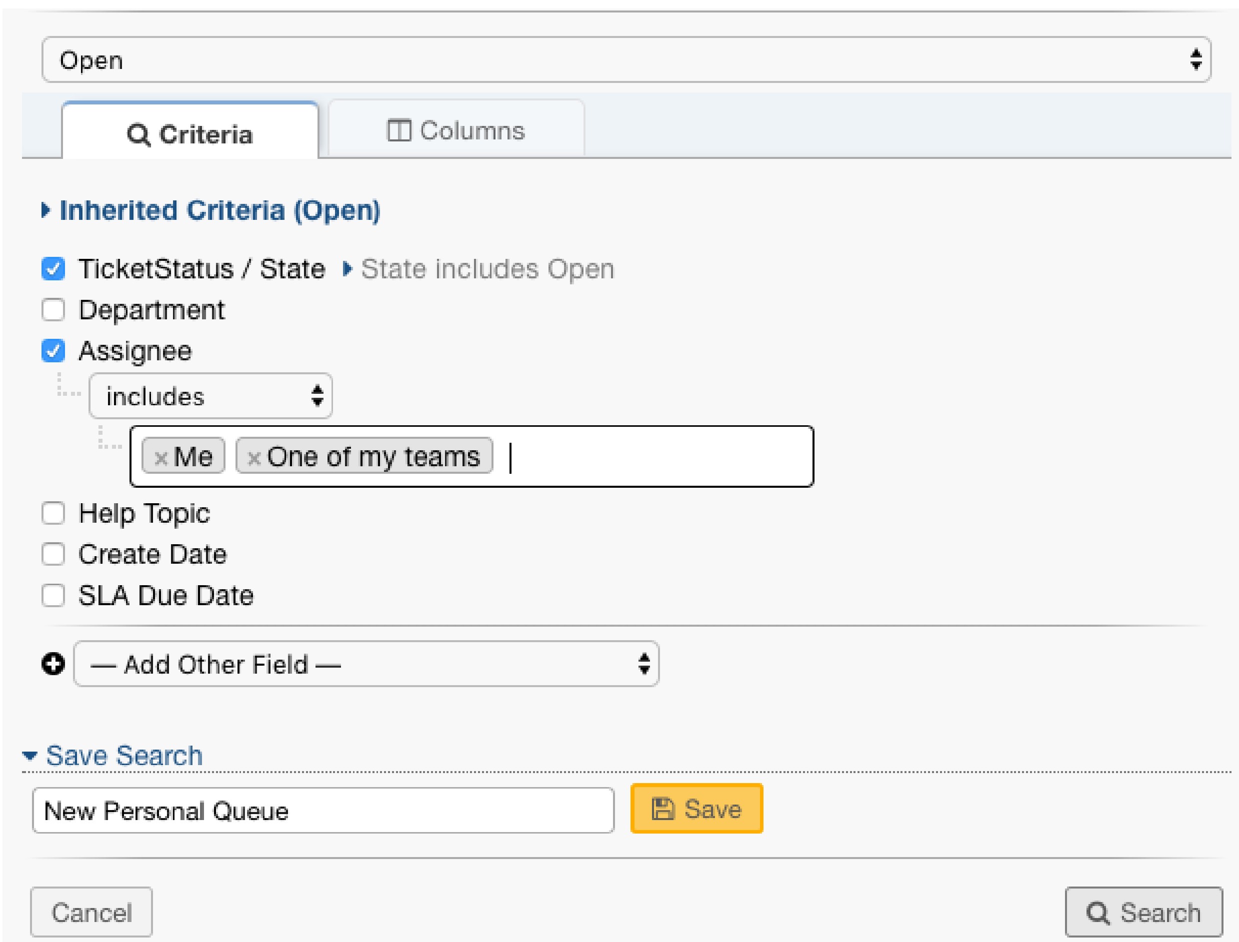
A custom column is an additional field that is not displayed initially when viewing the ticket tab. Using custom columns allows you to include these fields in the ticket list.

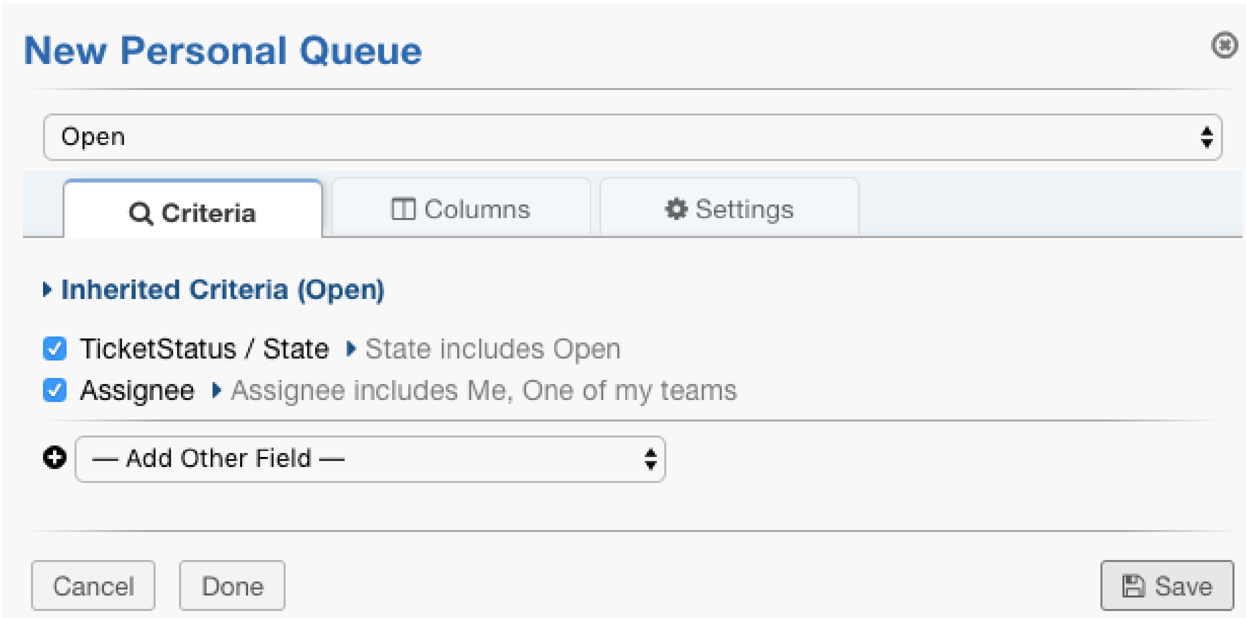
18.3 How do I create my own personal queues?

Each tab has a drop down menu where you can select the option to 'Add Personal Queue'.

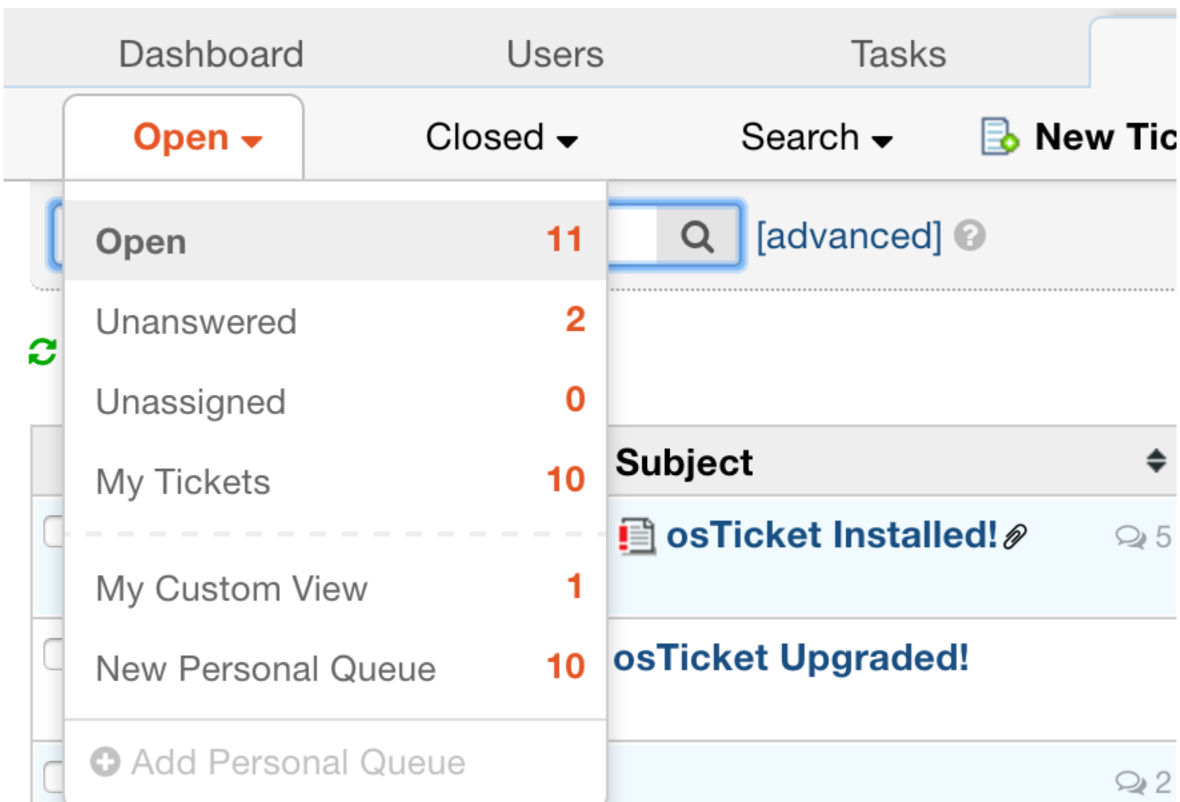


You are then prompted to specify what criteria of you would like to see in regards to tickets in your personal queue:





Once you have saved your changes, the new queue will appear in the list:

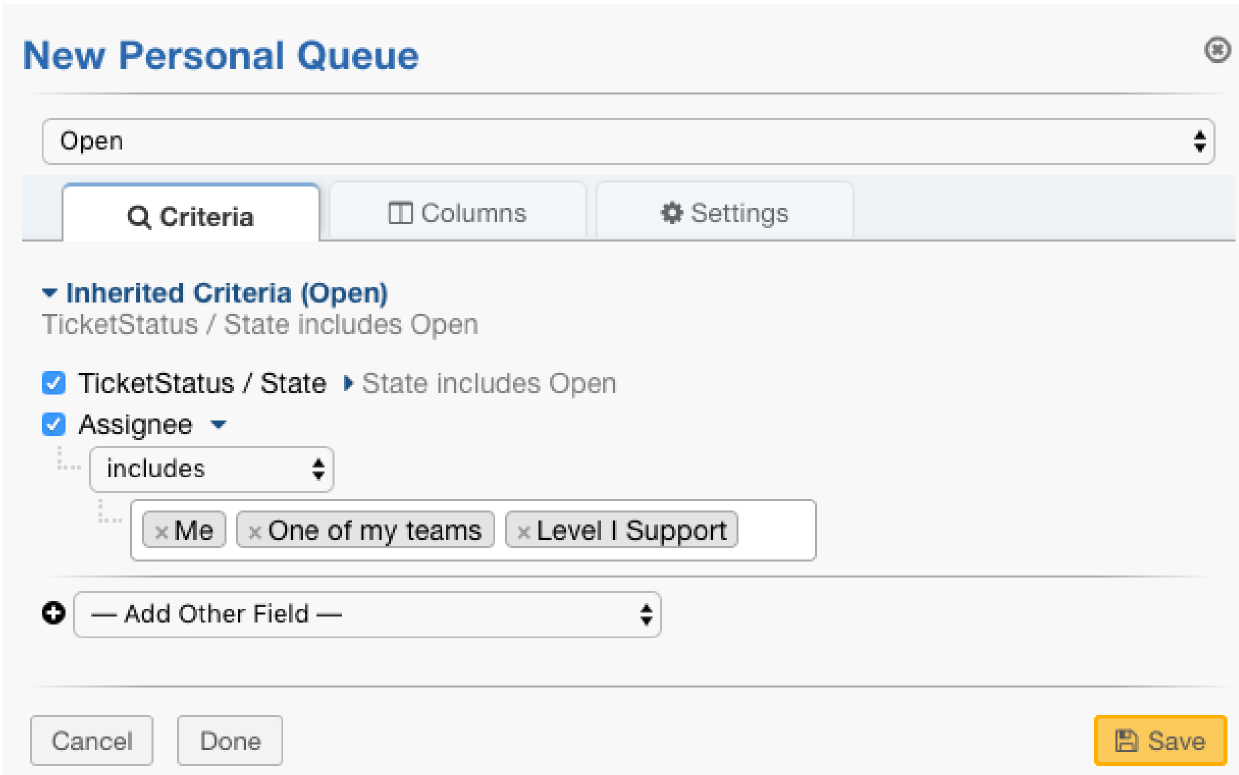


Note: Only you can see your personal queues

18.4 Where can I edit the personal queues I create?

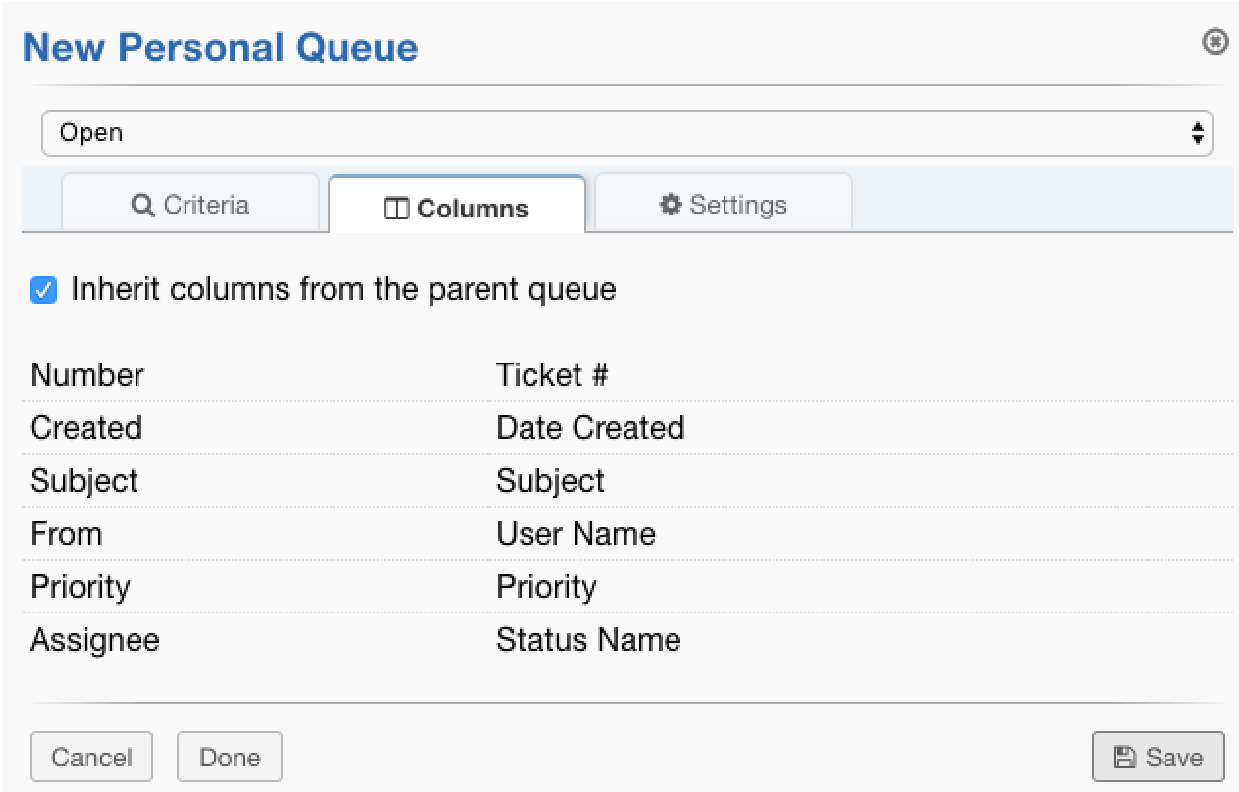
To edit your personal queues, simply go to the queue and click the settings button that appears beside the title and choose Edit.

From there, you are able to change the criteria options originally chosen:

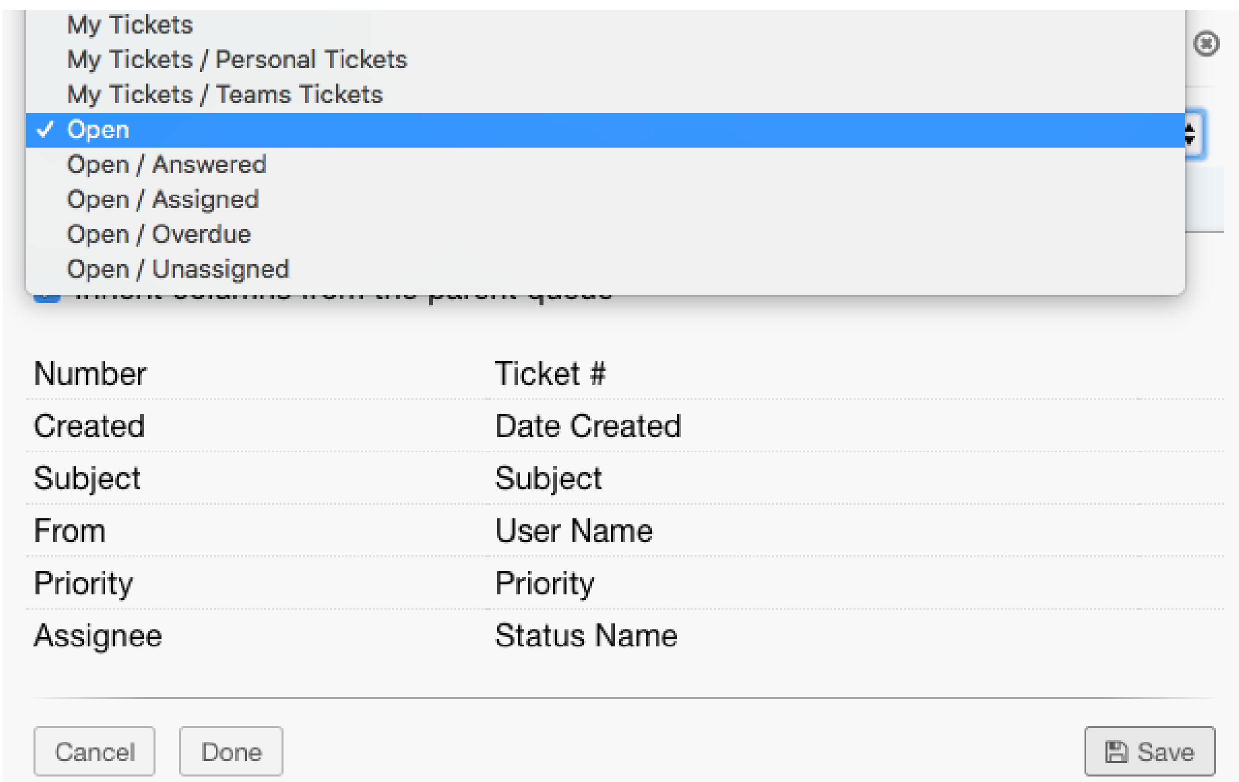


18.5 How do I add/modify columns to a personal queue?

Within the same edit menu, select the 'Columns' tab:

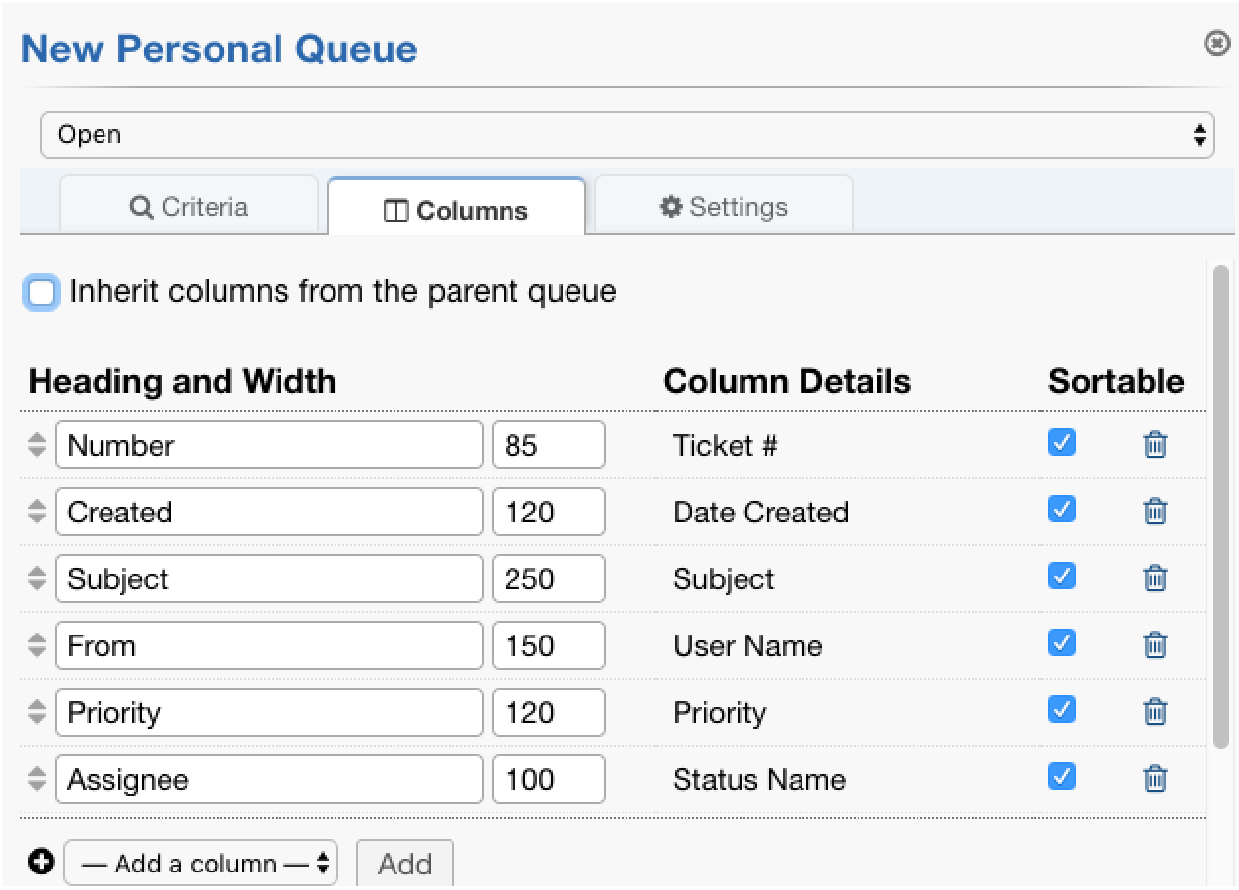


By default, columns will be inherited from the Parent queue which is 'Open' in this case. The parent queue can be changed using the dropdown box indicated with the arrow.

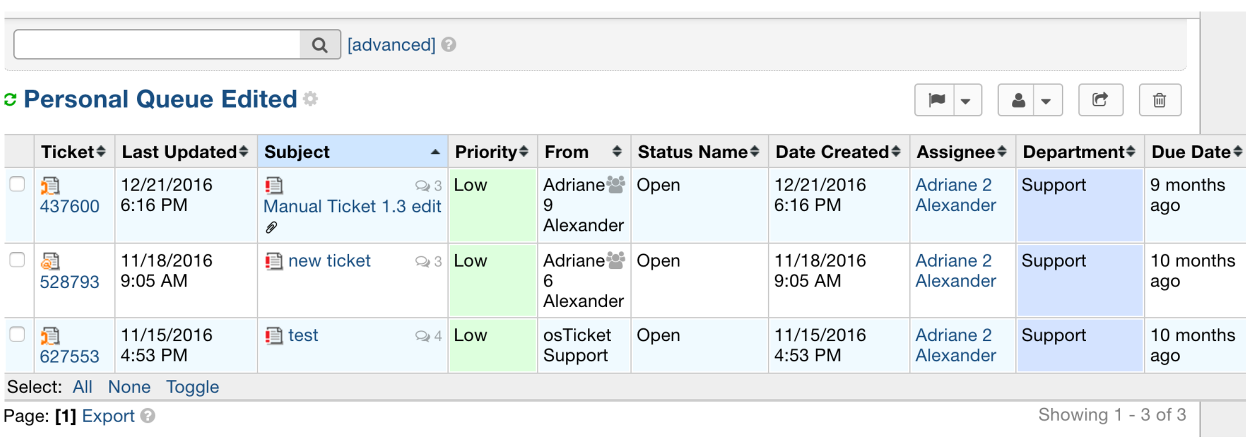


Once the 'Inherit columns from the parent queue' box is unchecked, more customizations can be made.

Here, you have the option to rename columns, modify their width, and remove columns. You can also rearrange the columns by dragging them by the double arrows to the far left.

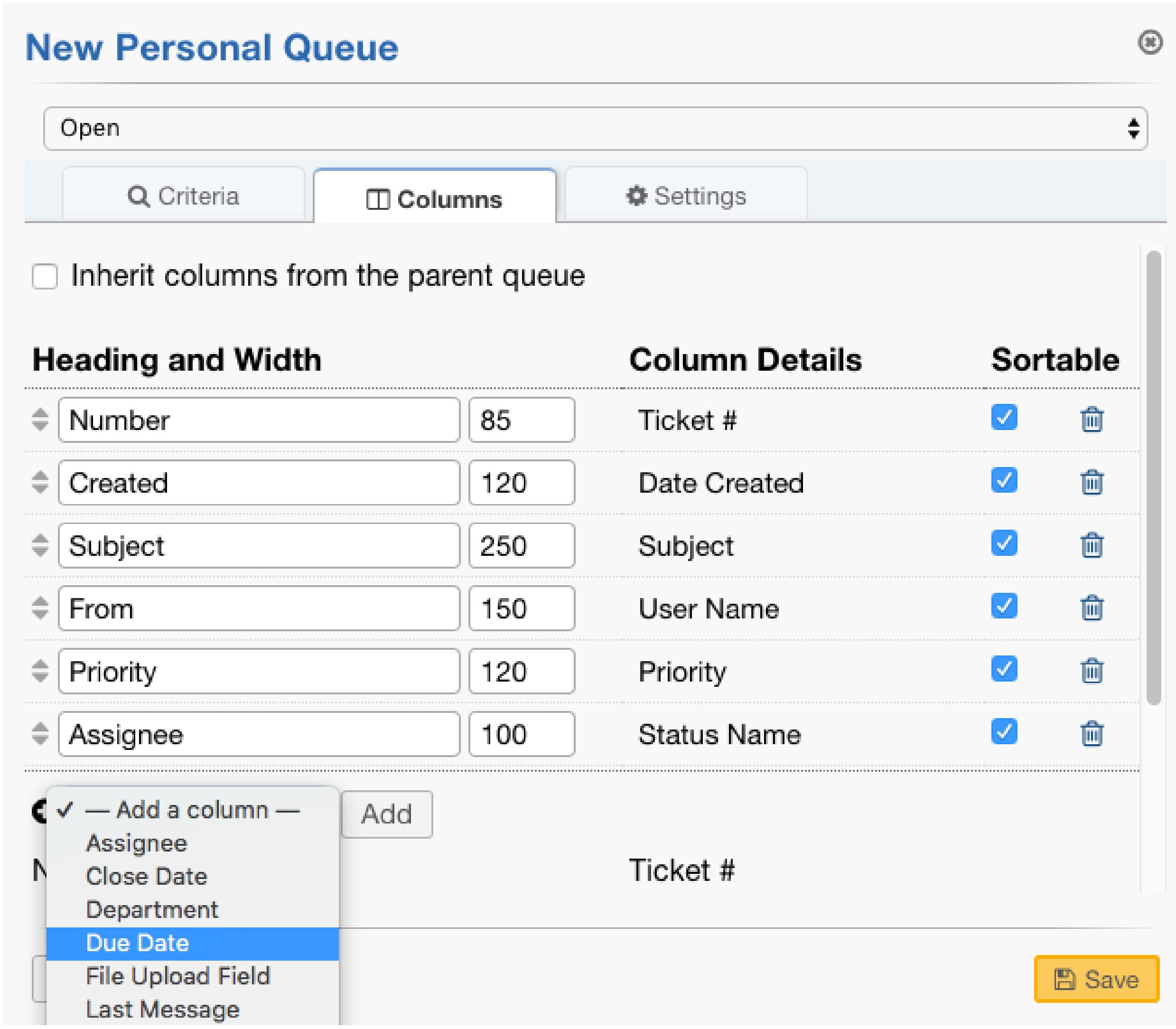


The sortable checkboxes make the column headings clickable. If you click the heading, tickets are sorted by that column. In this example, I have clicked the 'Subject' column displaying the tickets in alphabetical order by the Subject.

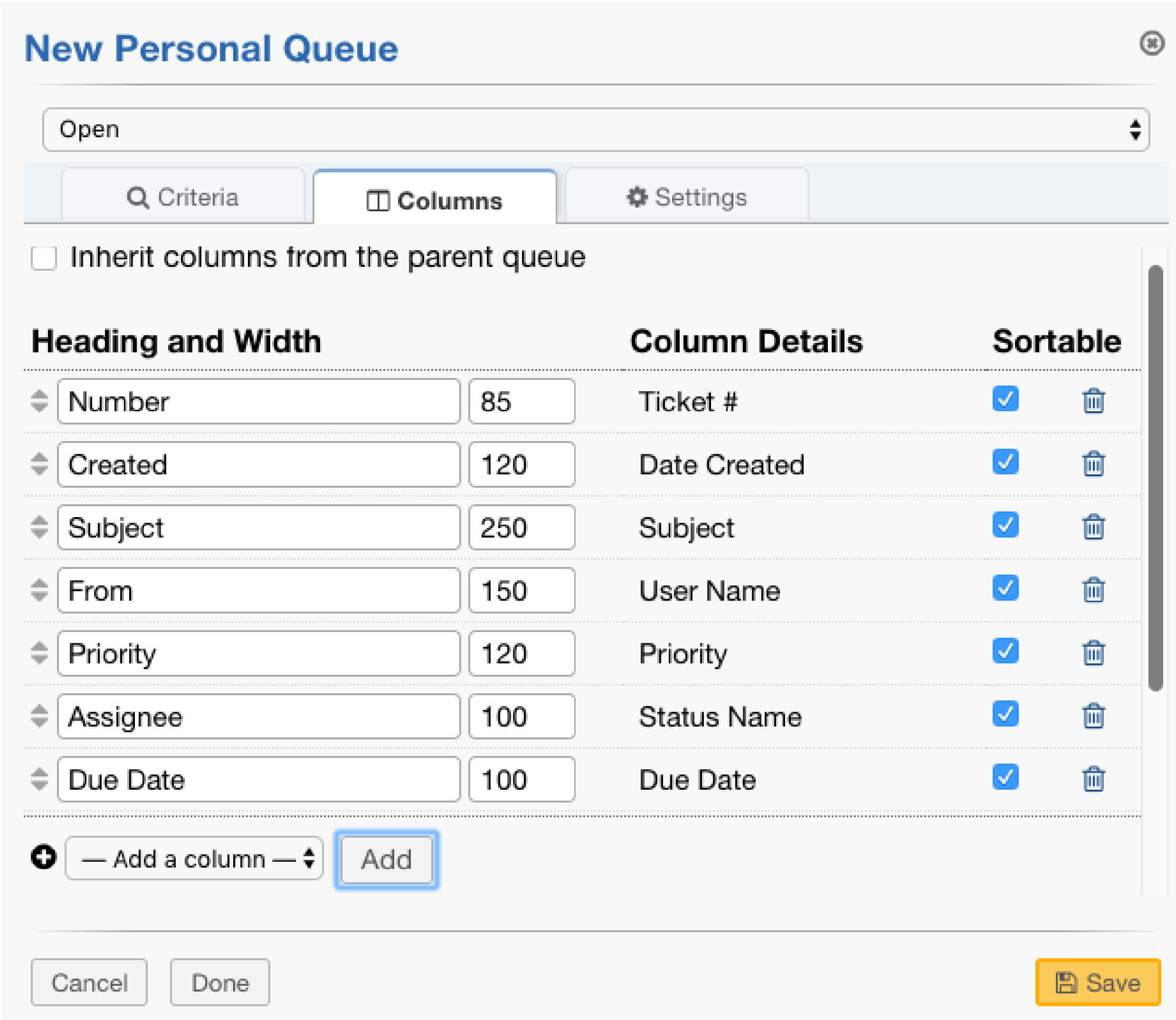


18.6 Adding Columns To A Personal Queue

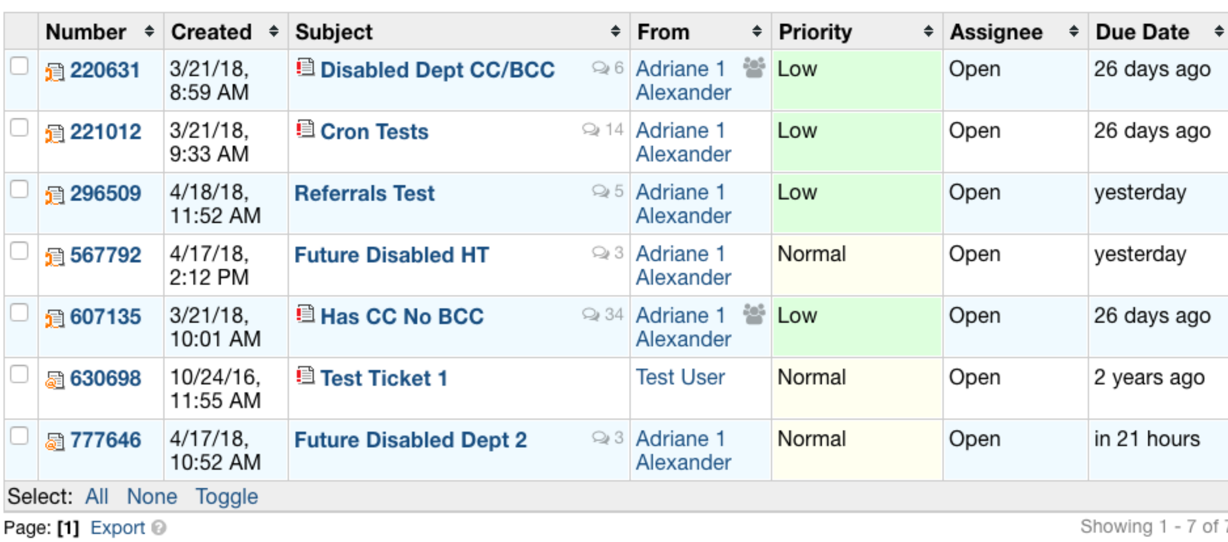
Click 'Edit' for your personal queue and go to the 'Columns' tab and scroll to the bottom of the window:



Click 'Add' and Save the changes.



Now the 'Due Date' field can be seen in the Personal Queue.



	Number	Created	Subject	From	Priority	Assignee	Due Date
	220631	3/21/18, 8:59 AM	Disabled Dept CC/BCC 6	Adriane 1 Alexander	Low	Open	26 days ago
	221012	3/21/18, 9:33 AM	Cron Tests 14	Adriane 1 Alexander	Low	Open	26 days ago
	296509	4/18/18, 11:52 AM	Referrals Test 5	Adriane 1 Alexander	Low	Open	yesterday
	567792	4/17/18, 2:12 PM	Future Disabled HT 3	Adriane 1 Alexander	Normal	Open	yesterday
	607135	3/21/18, 10:01 AM	Has CC No BCC 34	Adriane 1 Alexander	Low	Open	26 days ago
	630698	10/24/16, 11:55 AM	Test Ticket 1	Test User	Normal	Open	2 years ago
	777646	4/17/18, 10:52 AM	Future Disabled Dept 2 3	Adriane 1 Alexander	Normal	Open	in 21 hours

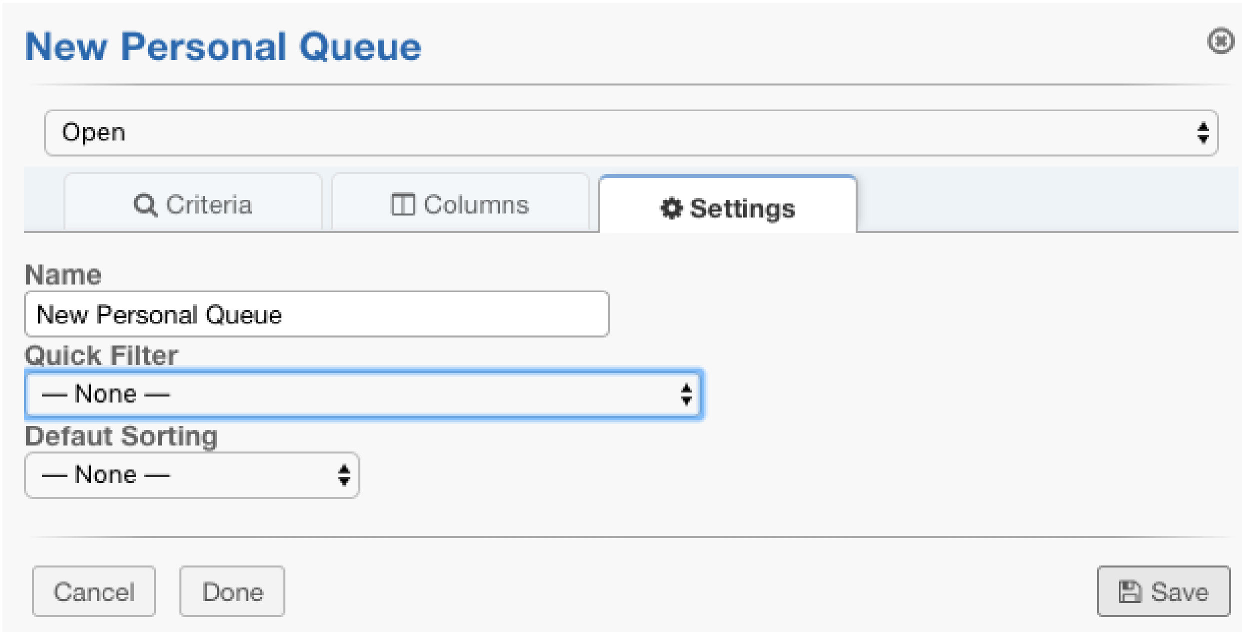
Select: All None Toggle

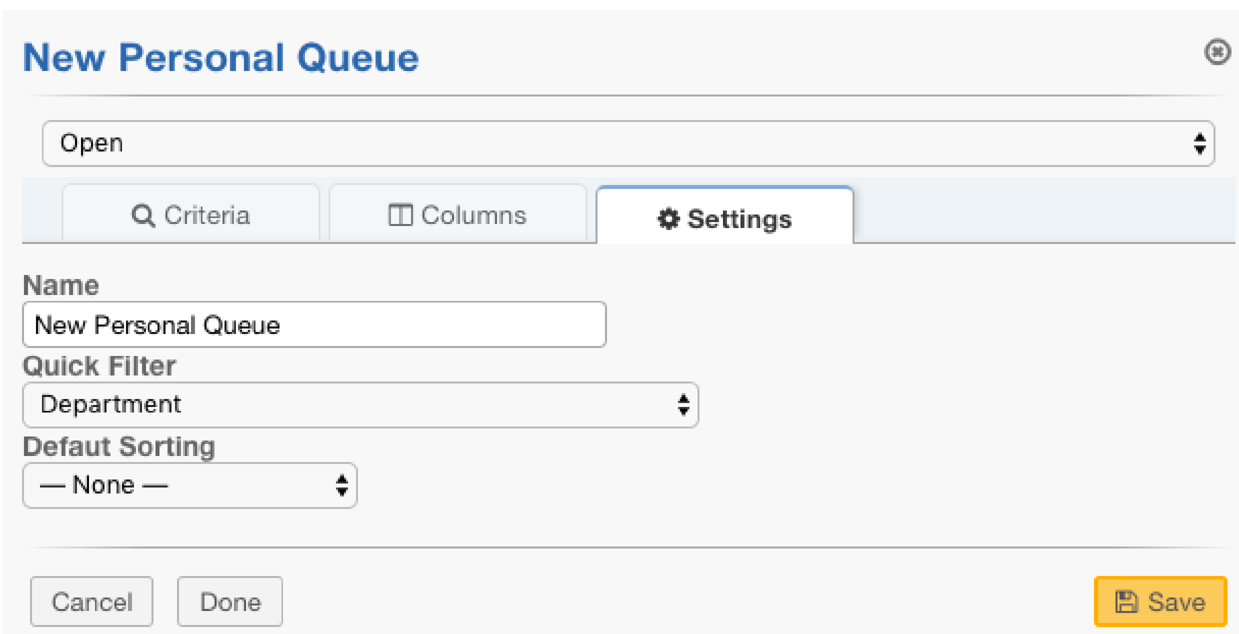
Page: [1] Export

Showing 1 - 7 of 7

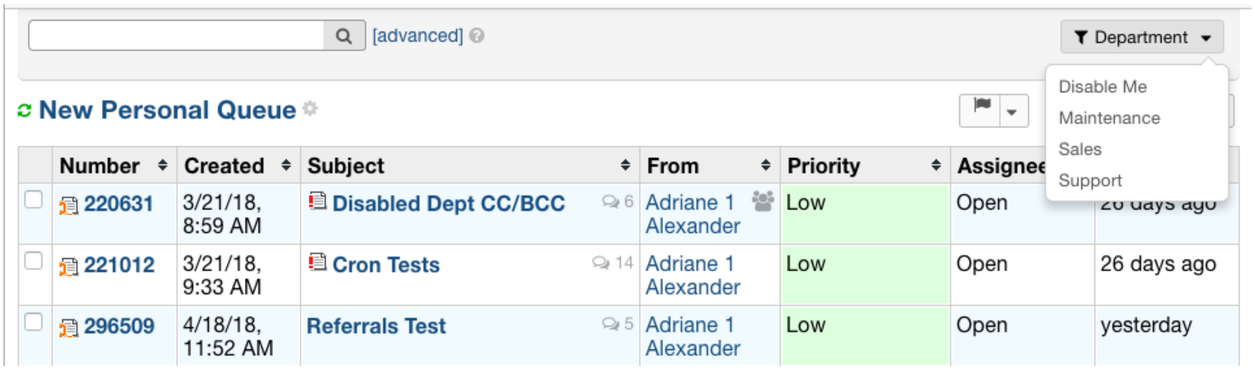
18.7 Adding Quick Filters

Quick Filters add an option to the top of the page to quickly filter by a specified field. Agents can add Quick Filters to Custom Queues by editing the Queue and going to the Settings tab.



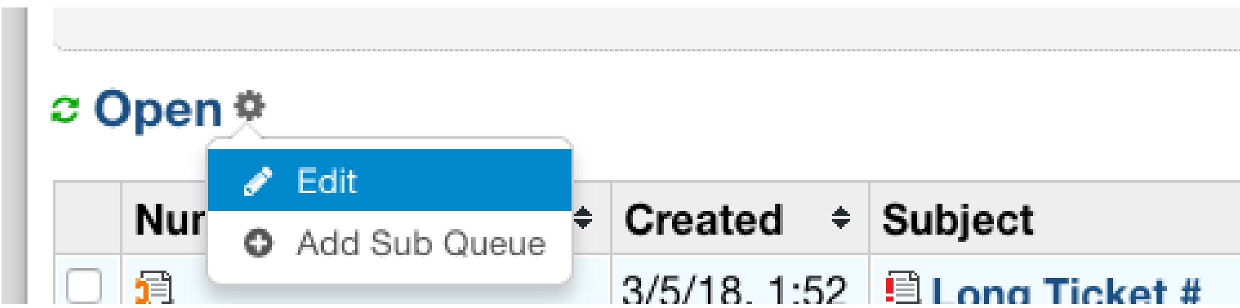


Once saved, an Agent can quickly filter tickets by the field of their choice

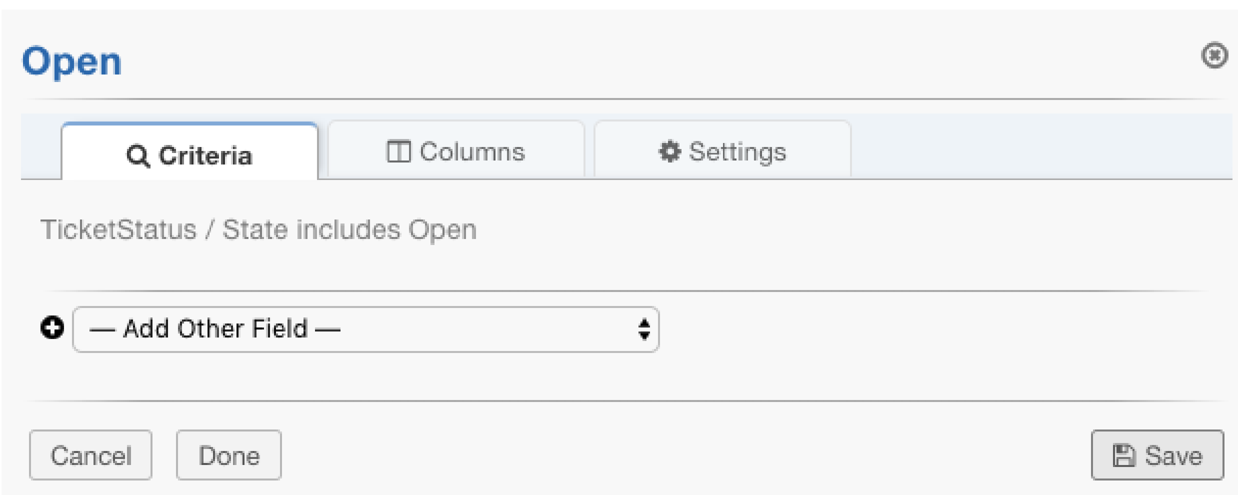


In addition to being able to create personal queues, Agents can also modify how existing queues show up specifically to them by editing the existing queues.

For example, editing the Open queue:



From here, Agents can customize existing queues in the same way they can customize their own personal queues.



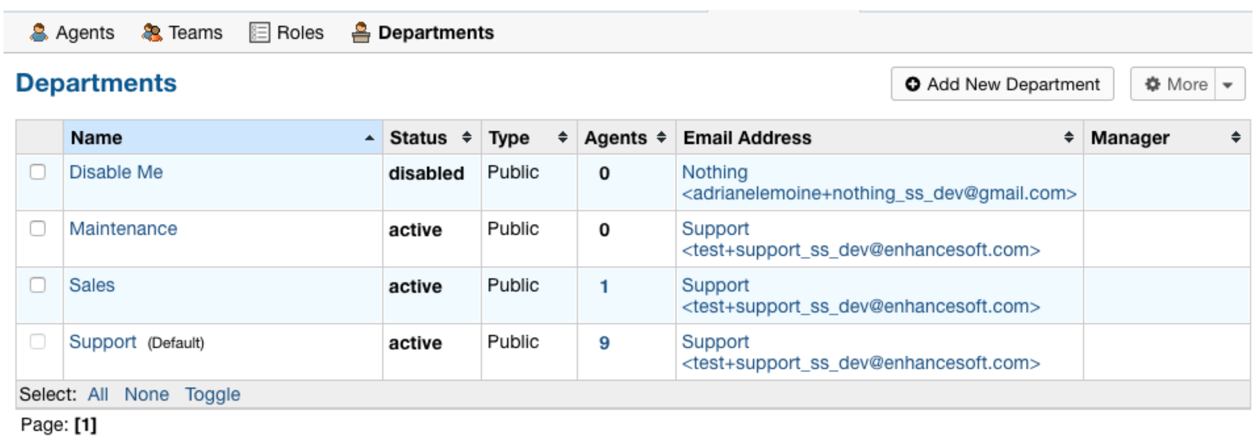
CHAPTER 19

Department CSV Export

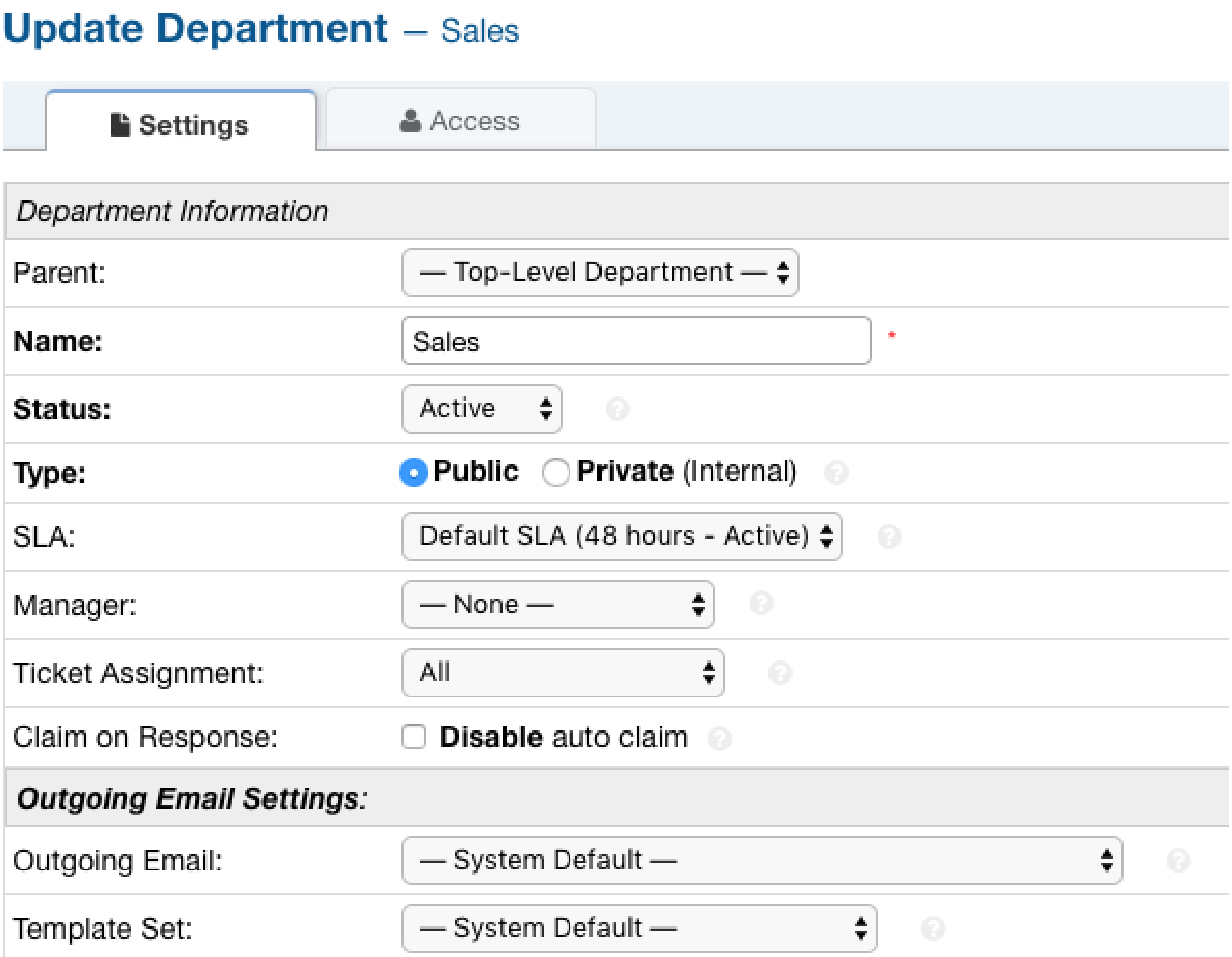
Administrators are now able to download a CSV export of which Agents can access different Departments.

1. Go to:

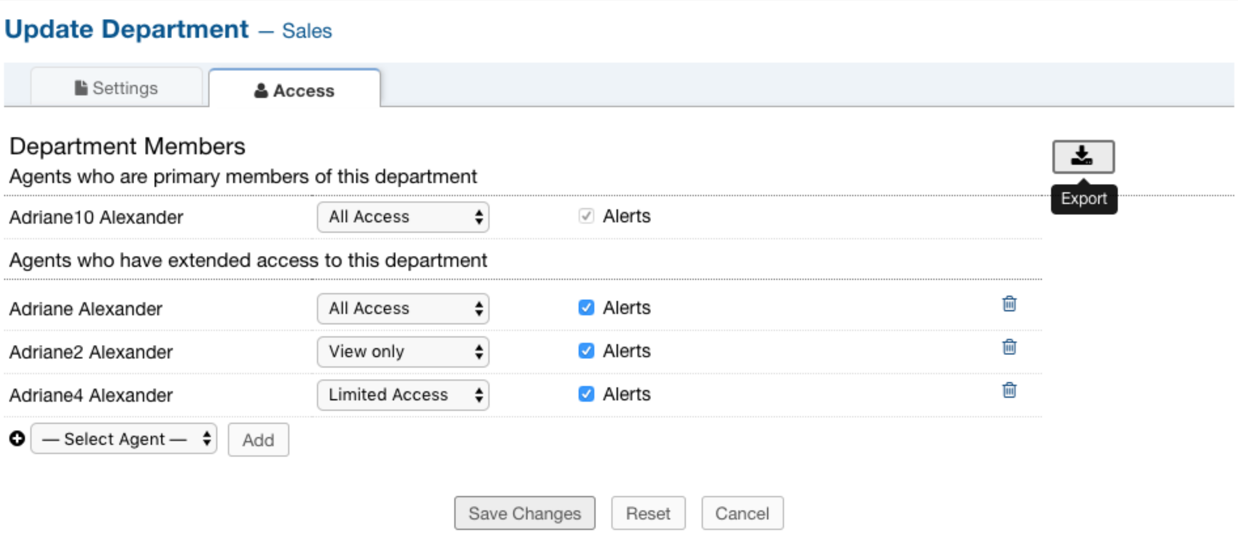
Admin Panel | Agents Tab | Departments



2. Select a Department



3. Click the 'Access' tab
4. In the top right corner of the page, there is a download button. Simply click this button to export the CSV.



19.1 CSV Output:

Name	Username	Access Type	Access Role
Adriane Alexander	aydreeihn	Extended	All Access
Adriane10 Alexander	adriane10	Primary	All Access
Adriane2 Alexander	aydreeihn2	Extended	View only
Adriane4 Alexander	adriane4	Extended	Limited Access

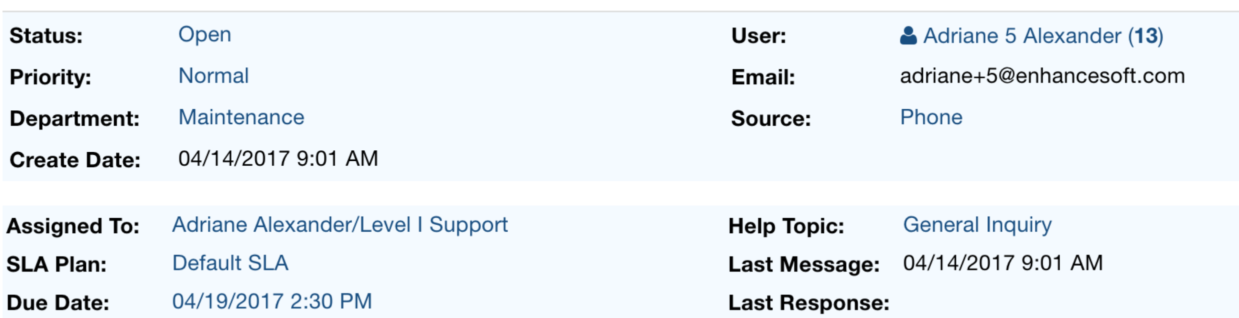
***Note:** The access type may be Primary or Extended depending on which type of access an Agent has.

CHAPTER 20

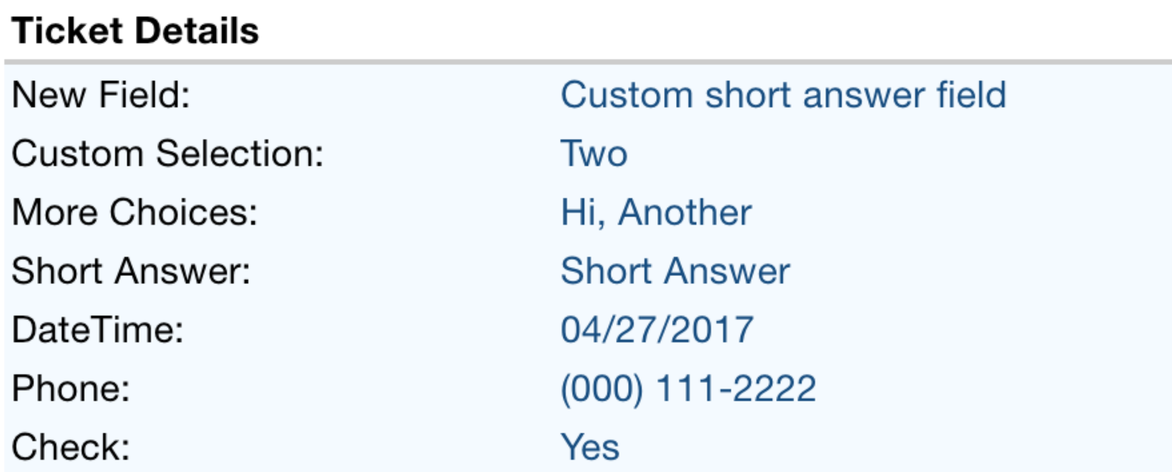
Inline Edit

With Inline Edit, an Agent can modify an individual field on a ticket without having to edit the entire ticket. Within the ticket header, each field that can be edited inline is selectable (highlighted in blue) and can be changed by simply clicking the field value. Inline editing can be done on a ticket's standard fields as well as custom fields.

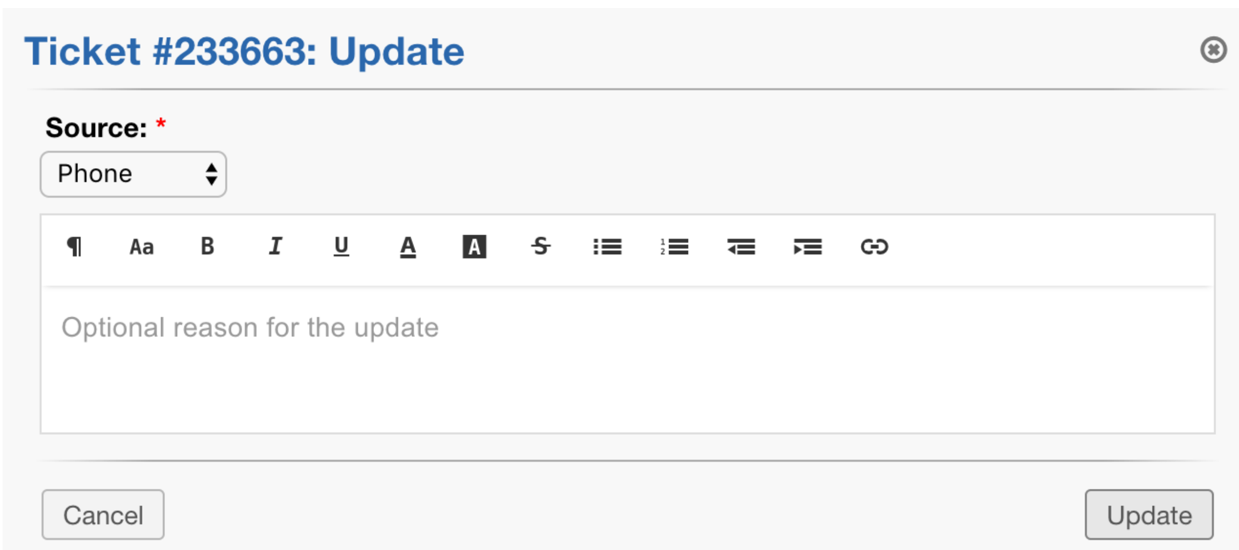
20.1 Standard Fields



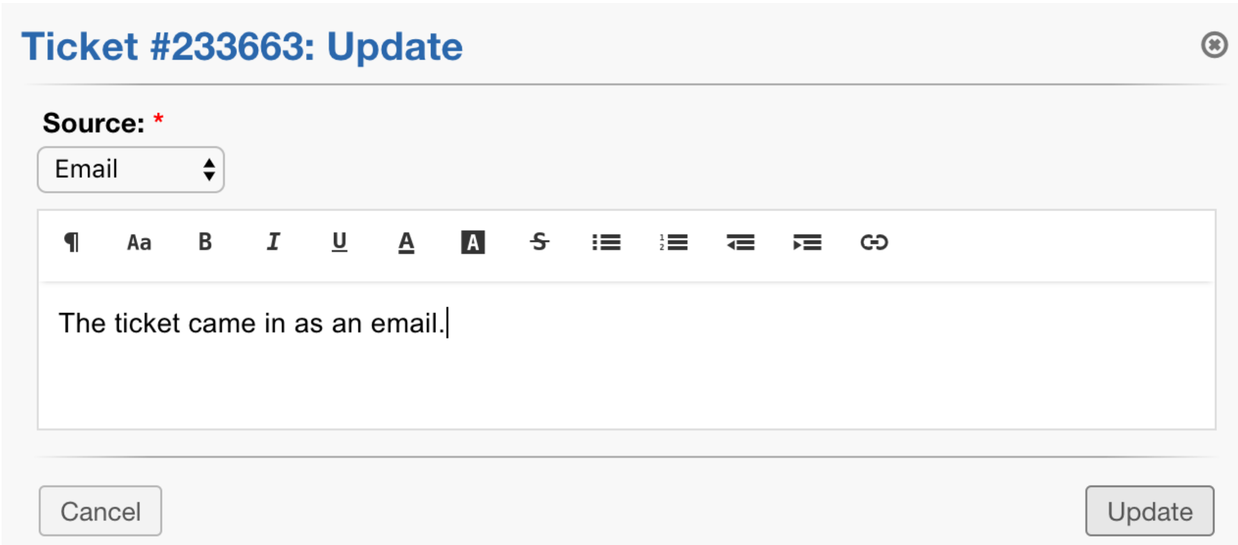
20.2 Custom Fields



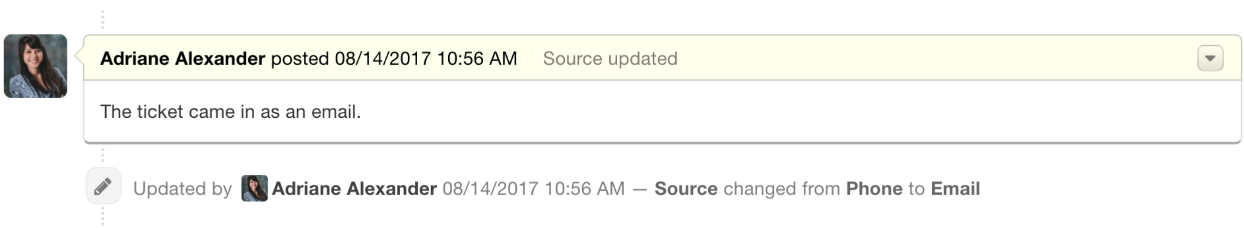
Once a field value has been clicked, a popup will appear allowing an agent to change the field as well as providing a reason for the update.



20.3 Field Update



Once saved, the change is noted in the ticket's history.



CHAPTER 21

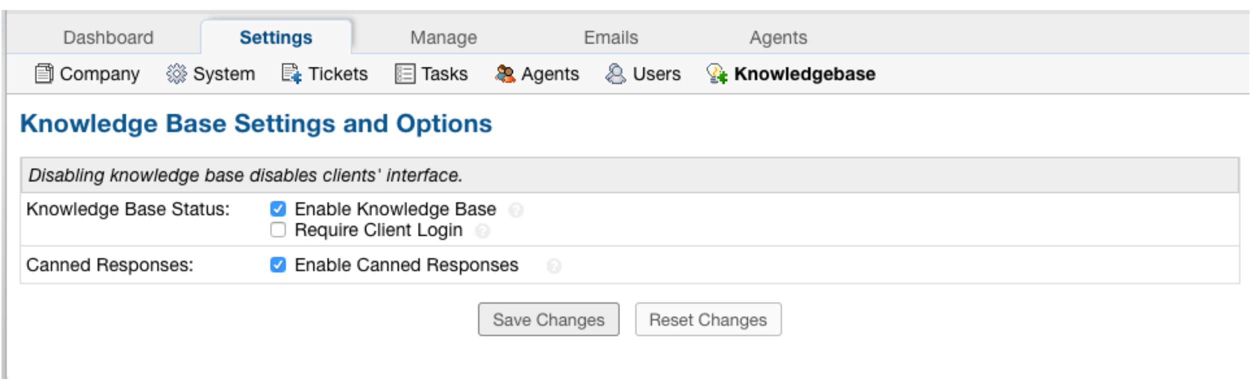
Nested Knowledgebase Categories

Agents now have the ability to further organize their Knowledgebase by nesting categories beneath each other.

21.1 Configuration

First the Administrator should make sure that the Knowledgebase has been enabled.

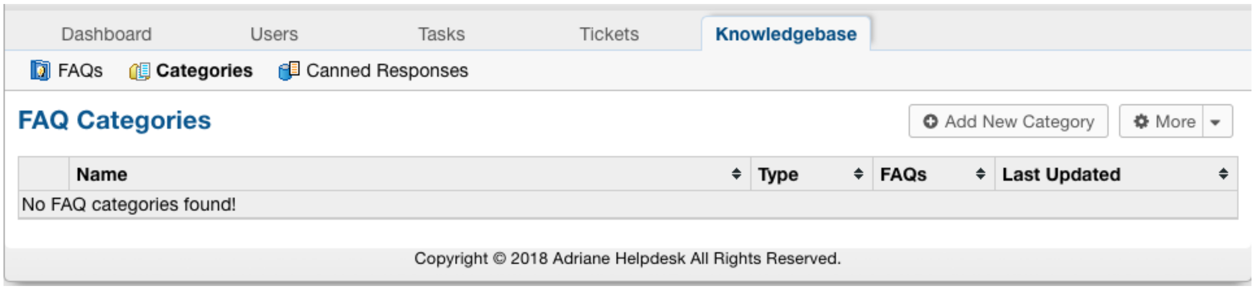
Go to: Admin Panel | Settings | Knowledgebase | Enable Knowledge Base

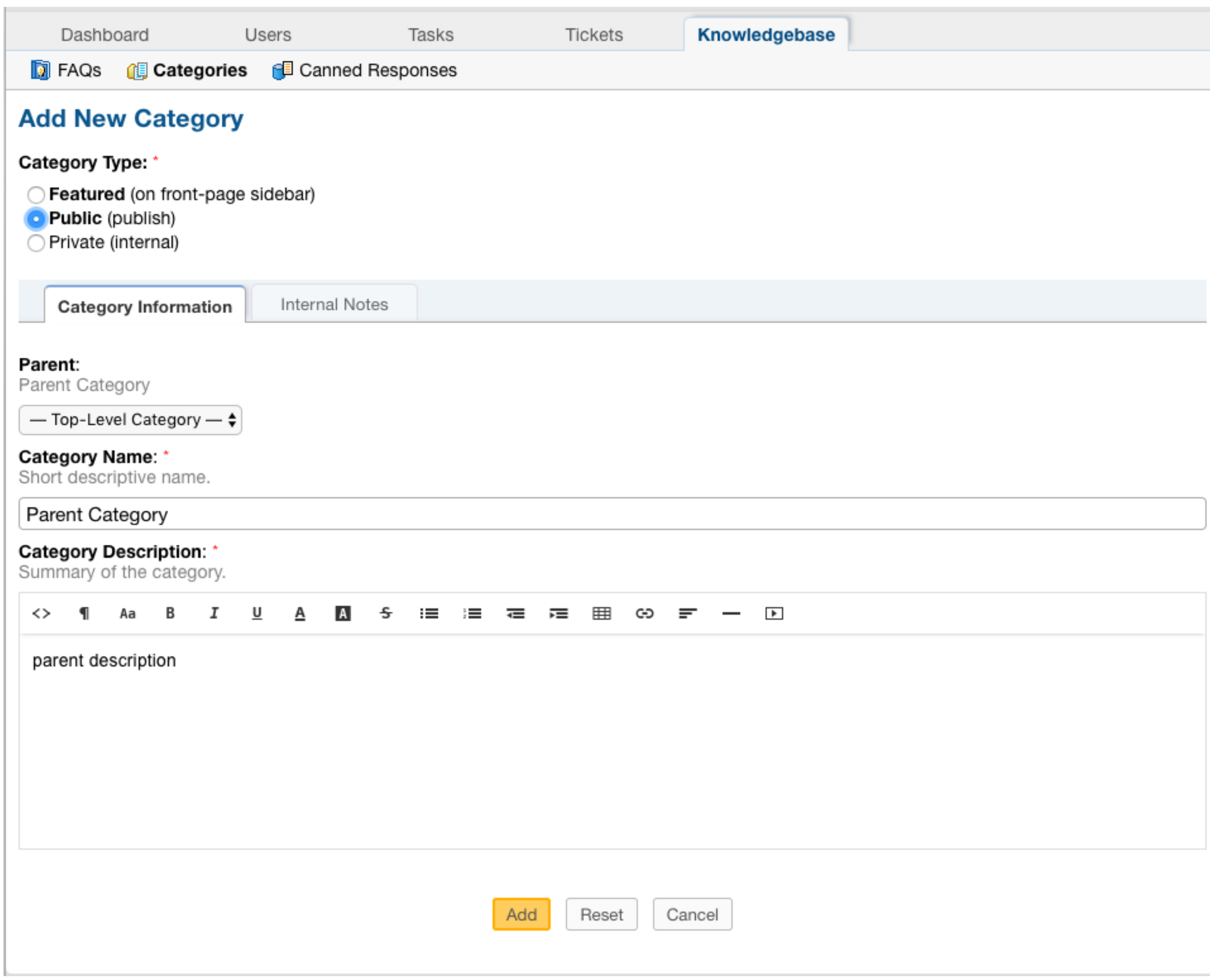


Next, an Agent should create a category.

21.2 Creating Categories

Go to: Agent Panel | Knowledgebase Tab | Categories | Add New Category





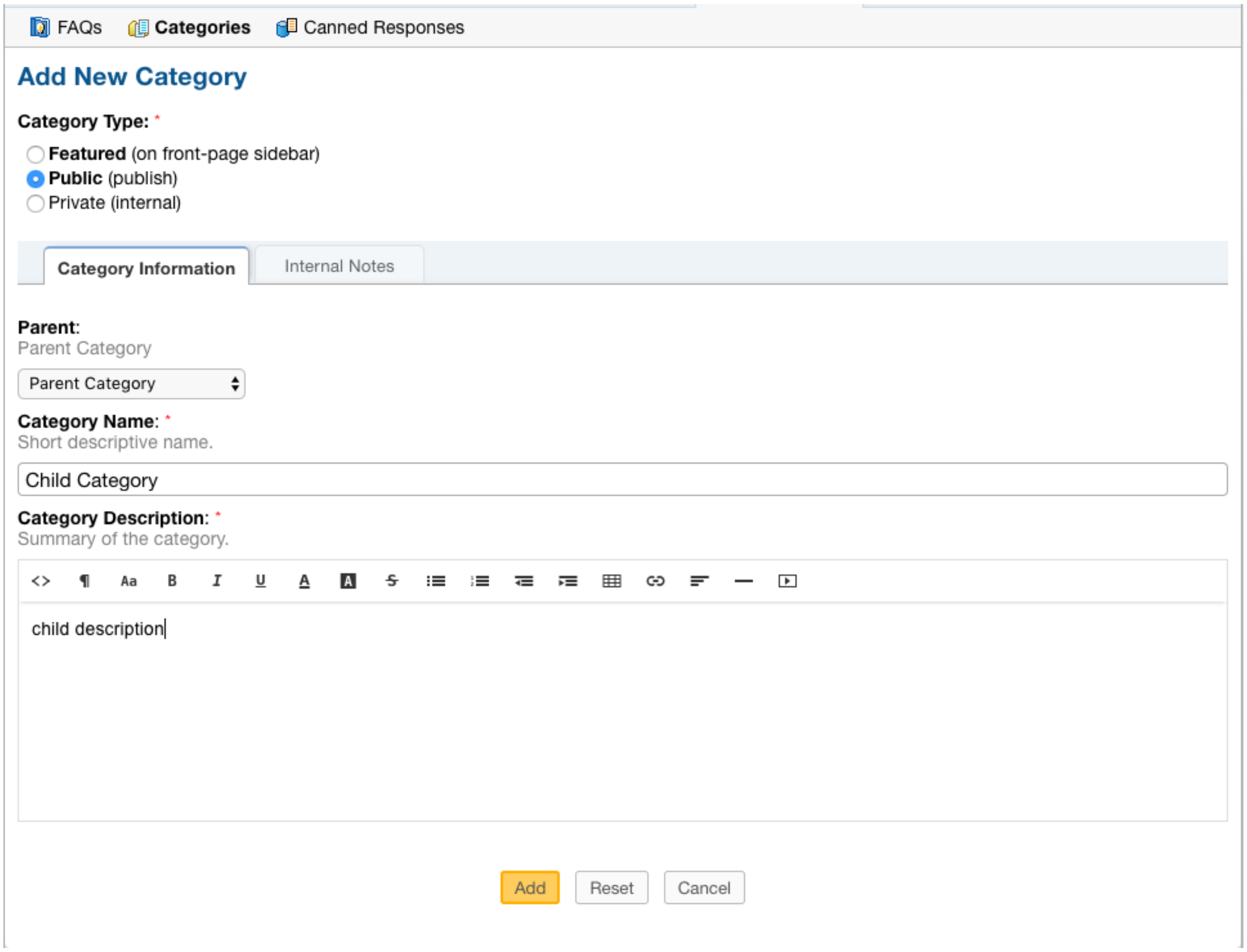
***Note:** The category must be set to Public to be seen in the Client Panel.

***Note:** There must be at least one FAQ in a Category for the Knowledgebase to be visible in the Client Panel.

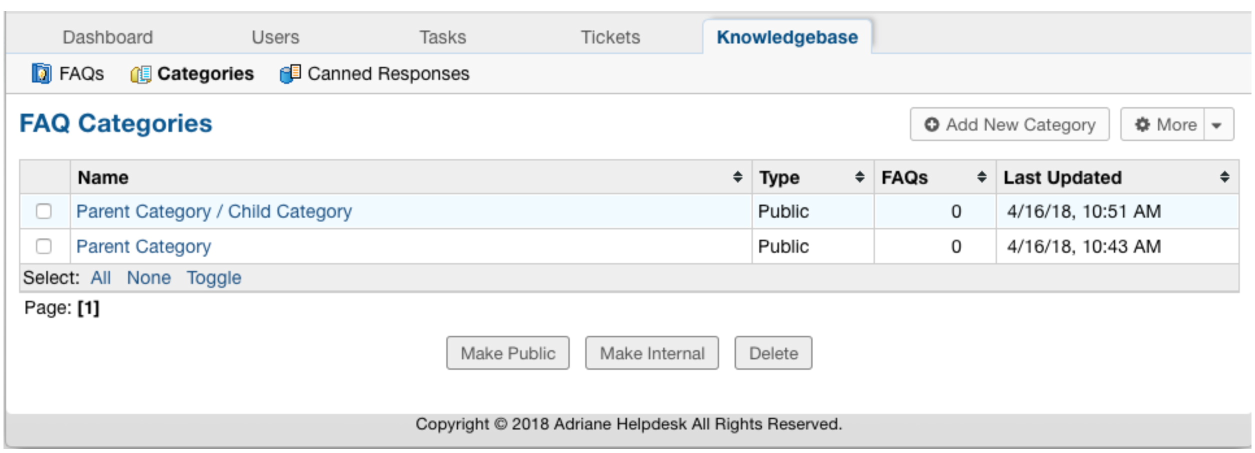
Now that you have an existing Category, you have the option to create a Child category.

Go to: Agent Panel | Knowledgebase Tab | Categories | Add New Category

This time, choose the existing Categoy to be the Parent Category.



When viewing the Categories tab, Nested Categories are displayed like the following:



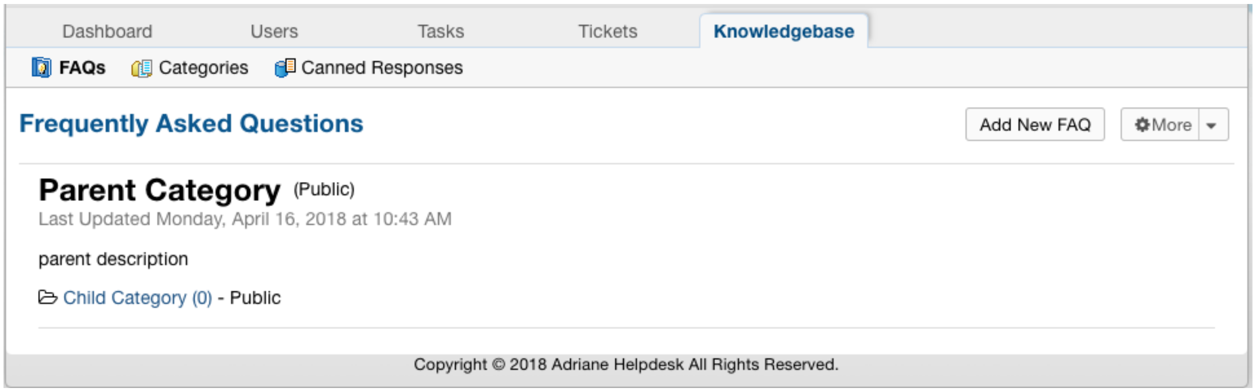
The name of the Parent is displayed first followed by the name of the Child, separated by '/'.

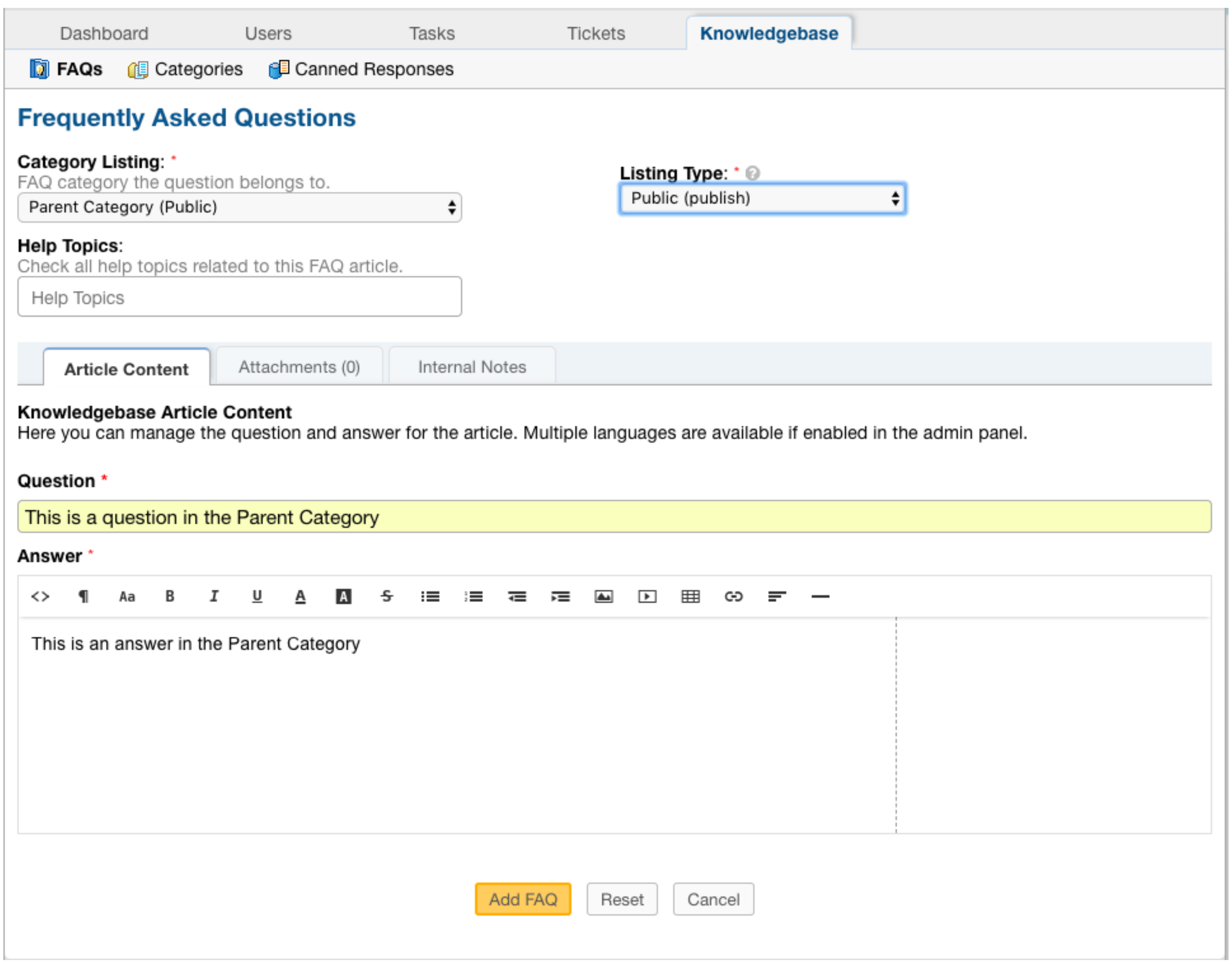
The final step is to add FAQ's to the categories.

21.3 Creating FAQs

Go to: Agent Panel | Knowledgebase Tab | FAQs | Click a Category | Add New FAQs

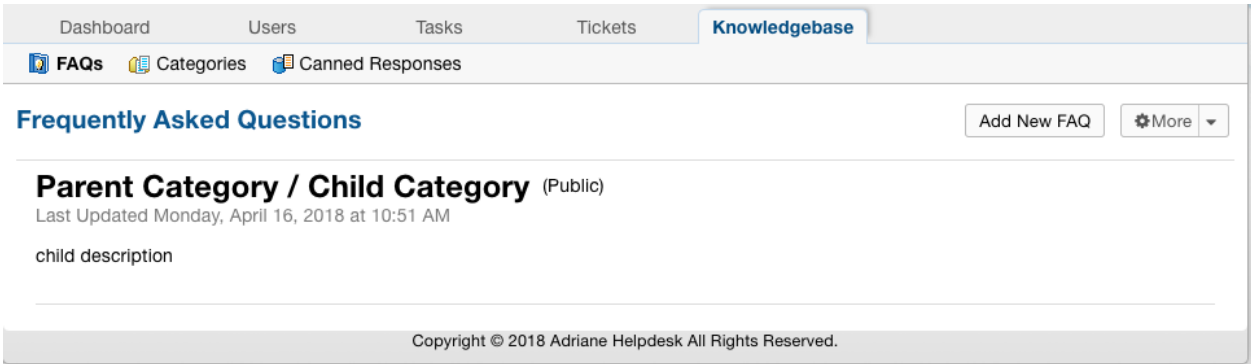
Adding an FAQ to the Parent Category:

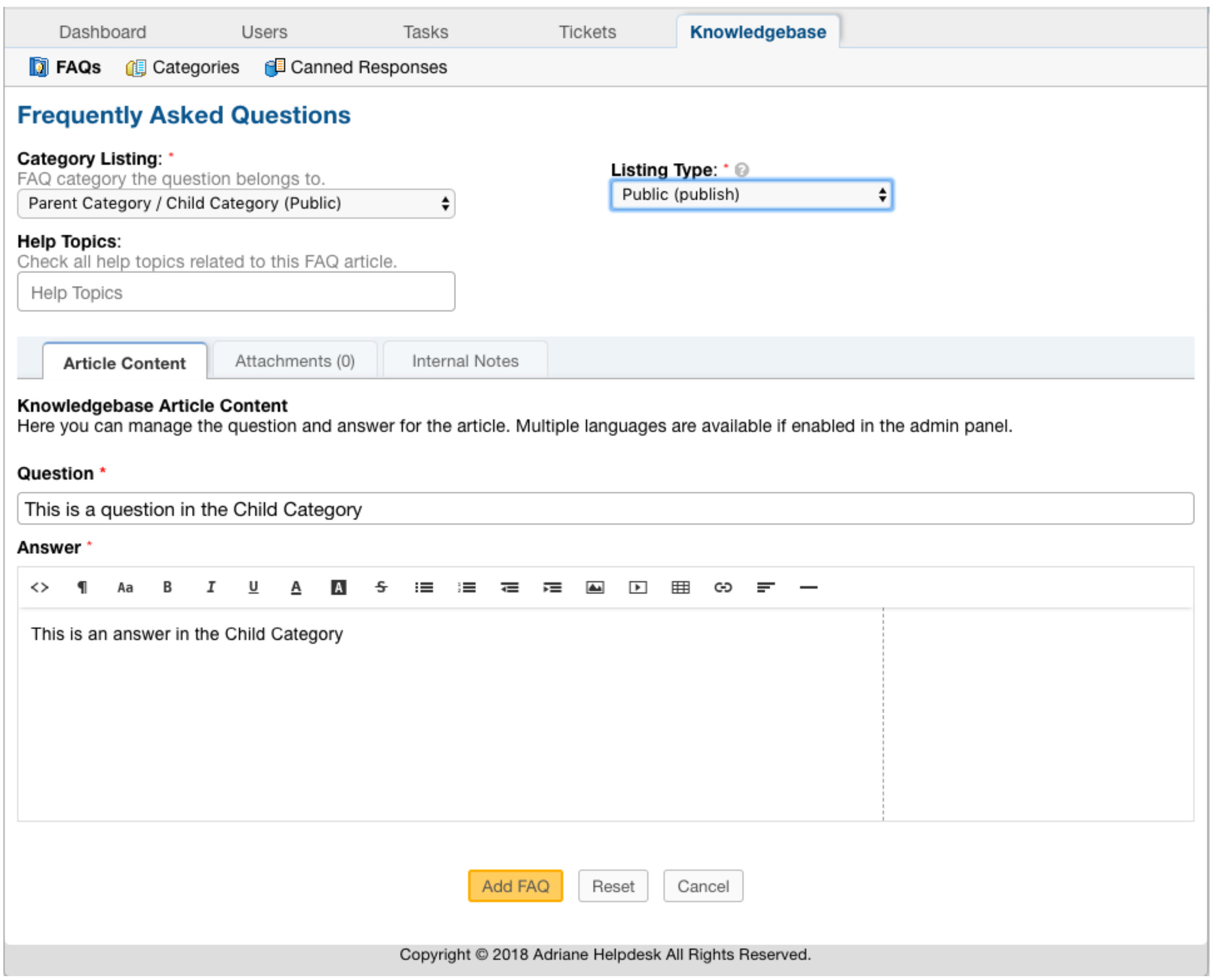




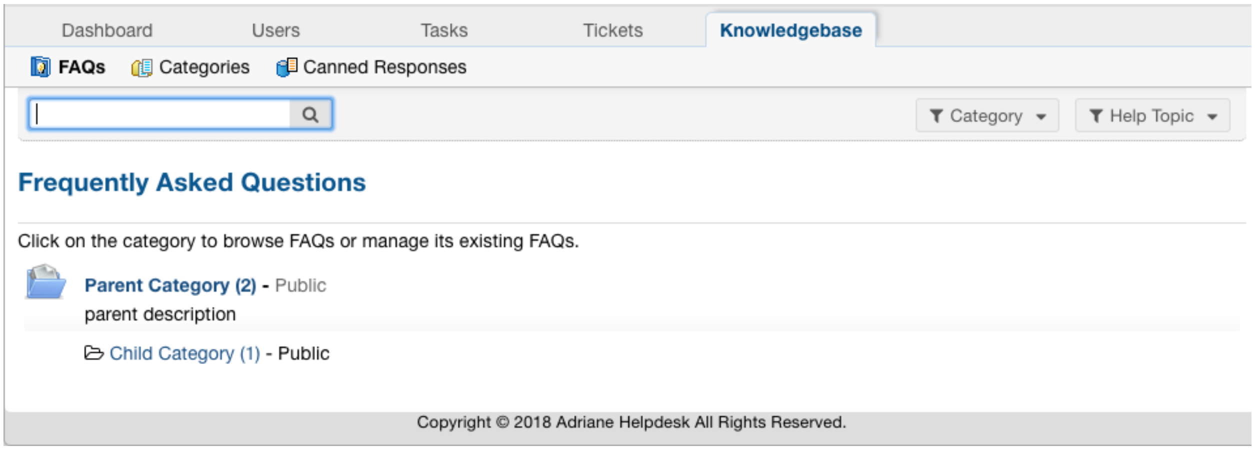
***Note:** The Listing Type must be set to Public to be seen in the Client Panel.

Adding an FAQ to the Child Category:





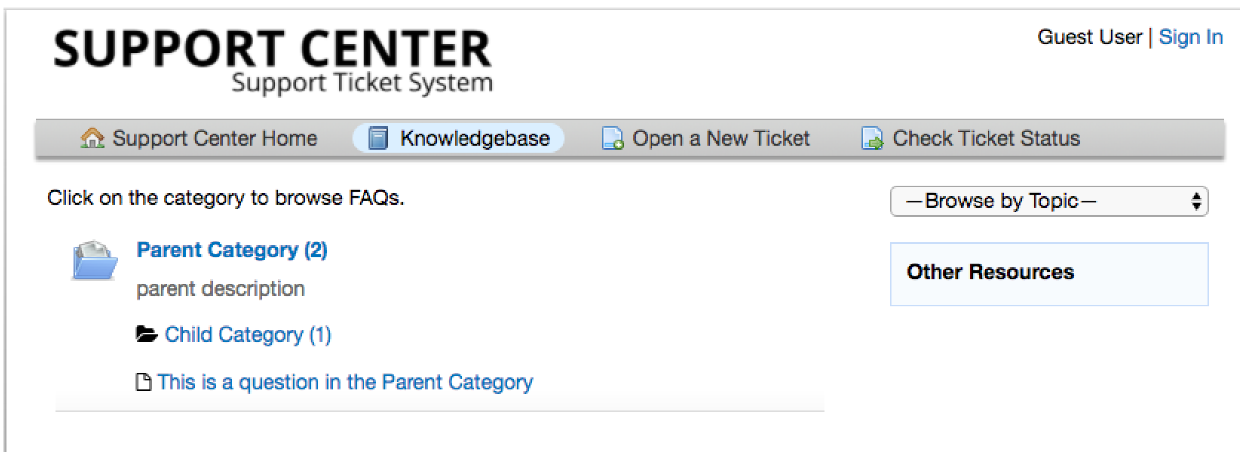
When viewing the FAQs tab, you see the Child Category listed as a folder beneath the Parent Category and a count of how many FAQs are within each.



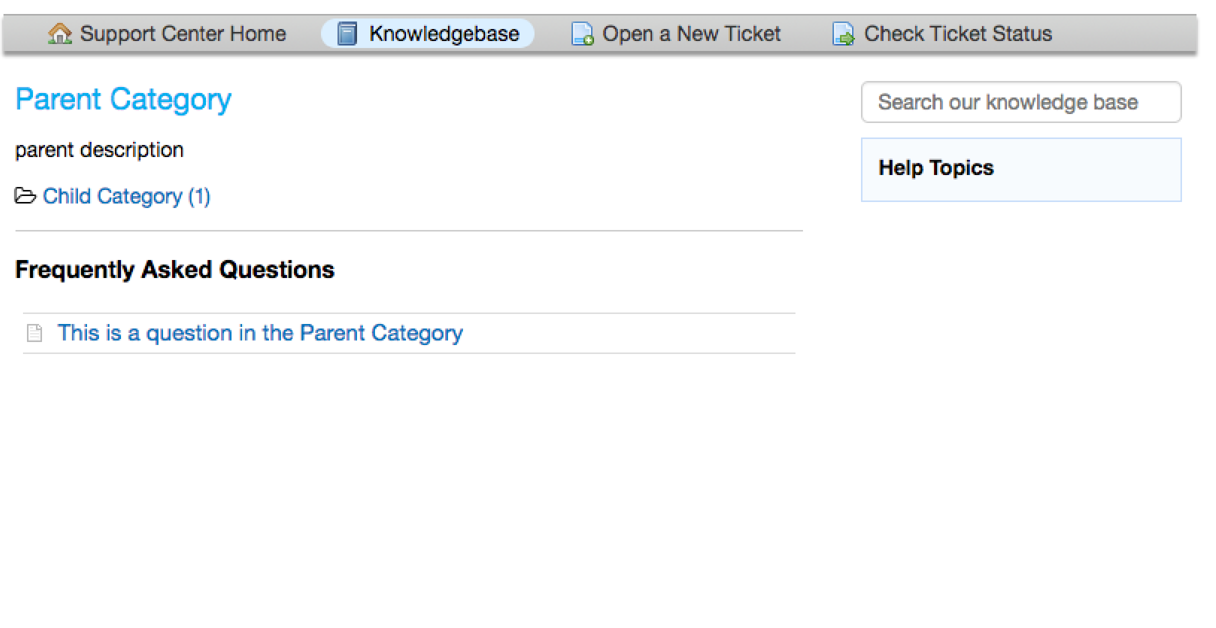
***Note:** The Parent Category has 2 FAQ's: one that was created in the Parent and one that was created in the Child category while the Child Category only has the FAQ that was created specifically for it.

Now that FAQs have been added, Users are able to see the Knowledgebase from the Client Portal:

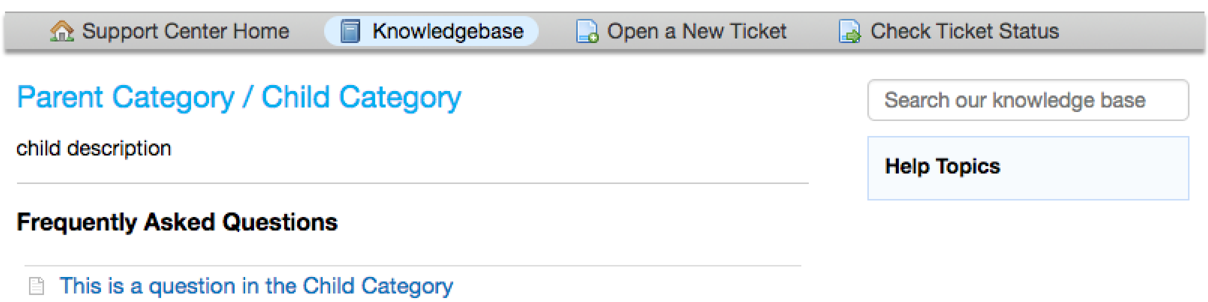
List of all Categories:



Parent Category:



Child Category:



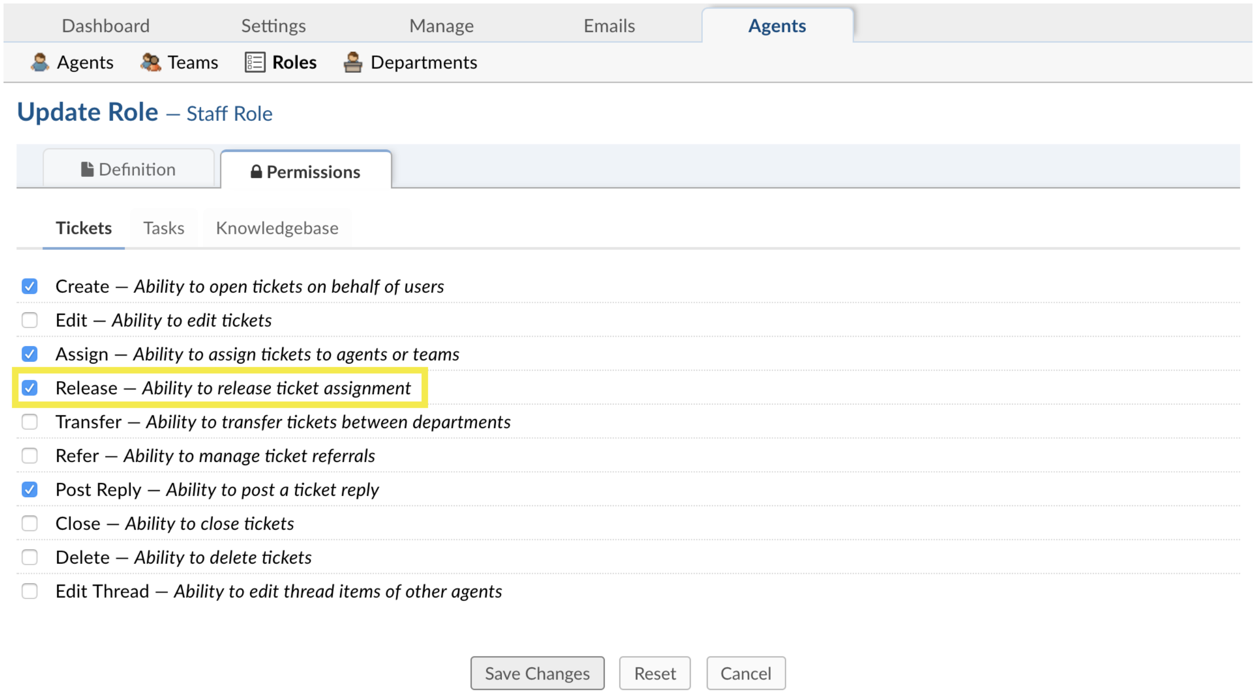
CHAPTER 22

Release Assignment

The Release Assignment feature allows Agents to release ticket assignment from other Agents and/or Teams. Agents may only access this feature if they have the new Release Role Permission assigned to them. An important thing to note is Department Managers do not need the Role Permission in order to release assignment of tickets within their Department.

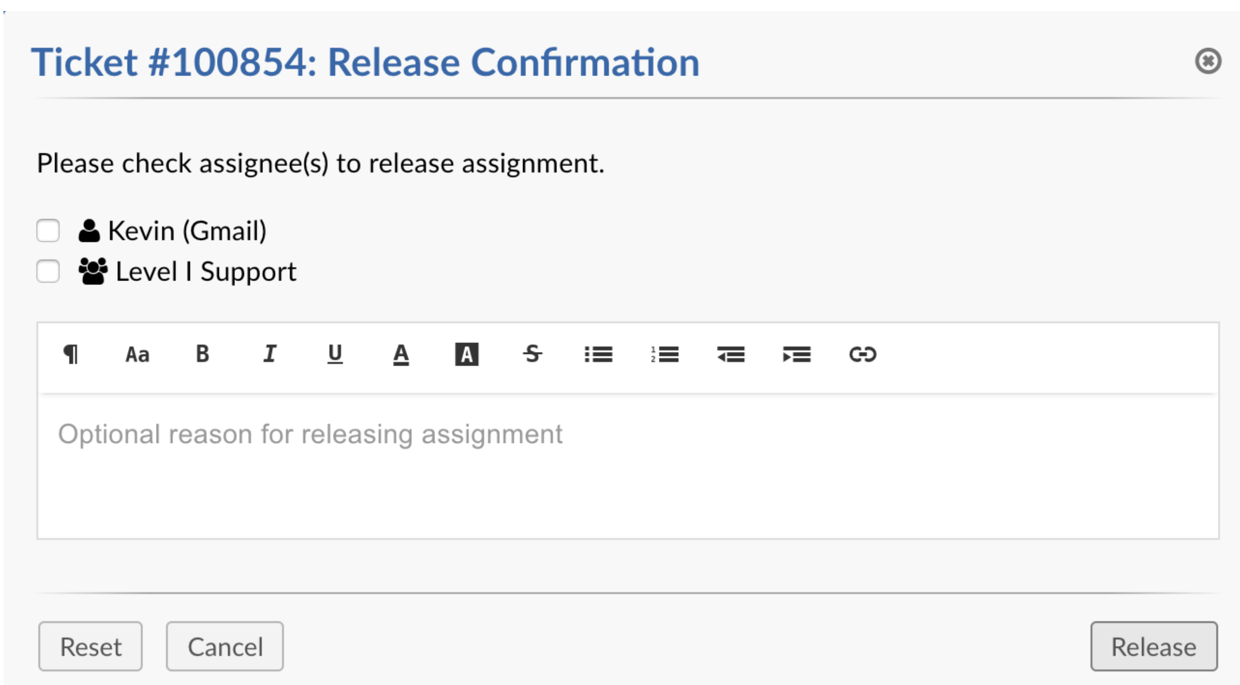
22.1 Release Role Permission

To access the Release Assignment feature the Agent's assigned Role for the Department must have the Release Role Permission enabled. To enable the permission for any Role an Administrator may navigate to **Admin Panel > Agents > Roles** and click on the name of the desired Role. Under the **Permissions** tab, check the box next to the Release permission, and Save Changes.



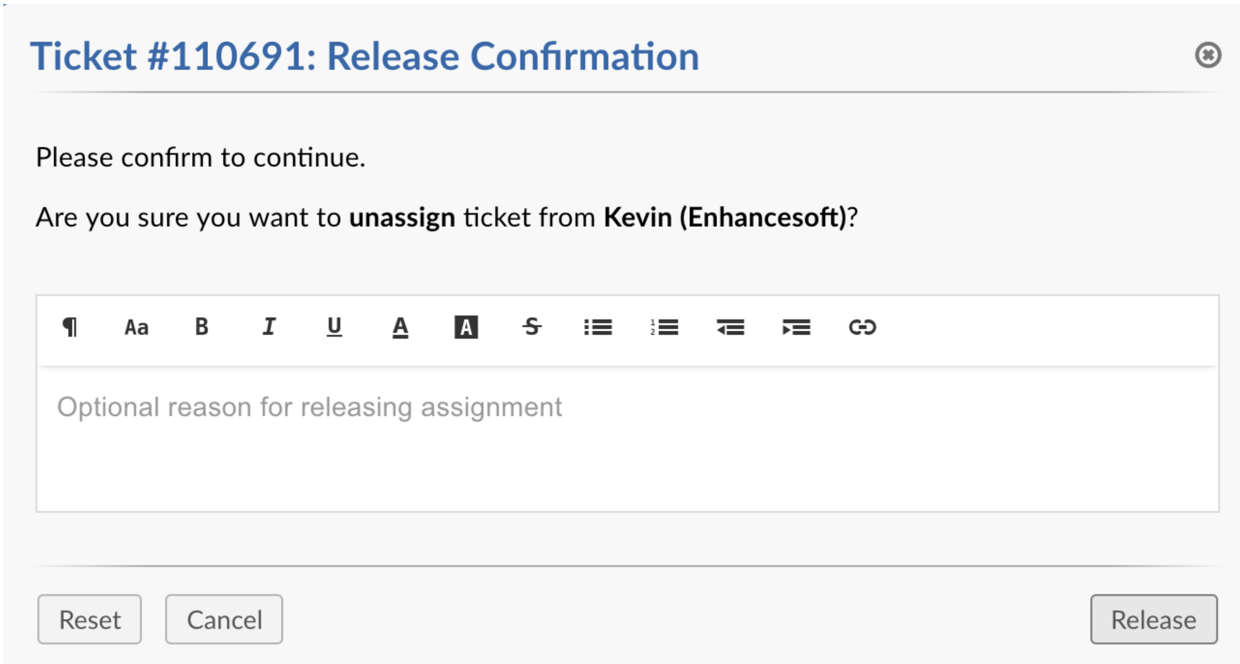
22.2 Release Agent & Team

Upon viewing an assigned ticket a **Release (unassign) Ticket** option will appear in the **More** dropdown (Cog-wheel Icon). Clicking this option will introduce a Release Confirmation modal on screen. If a ticket has both an Agent and Team assigned checkboxes will appear next to each name giving the option to choose whom to release assignment from. Checking both boxes will release assignment from both the Agent and Team. Checking one box will release assignment from only the selected Agent/Team.



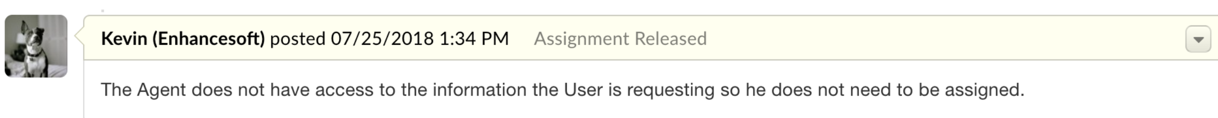
22.3 Release Agent or Team

If a ticket has only one Agent or Team assigned the modal will simply ask to confirm the release.



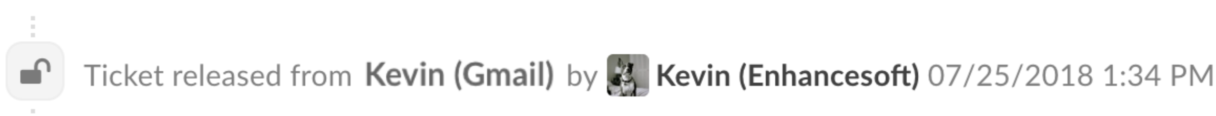
22.4 Internal Note

Both modals give Agents the ability to input a reason for releasing the assignment. If a reason is given it is added to the ticket thread as an Internal Note.



22.5 Thread Event

When an Agent releases assignment a Release Thread Event is added to the ticket thread. This thread event shows who released whose assignment and contains a date and time stamp of when the released occurred.



CHAPTER 23

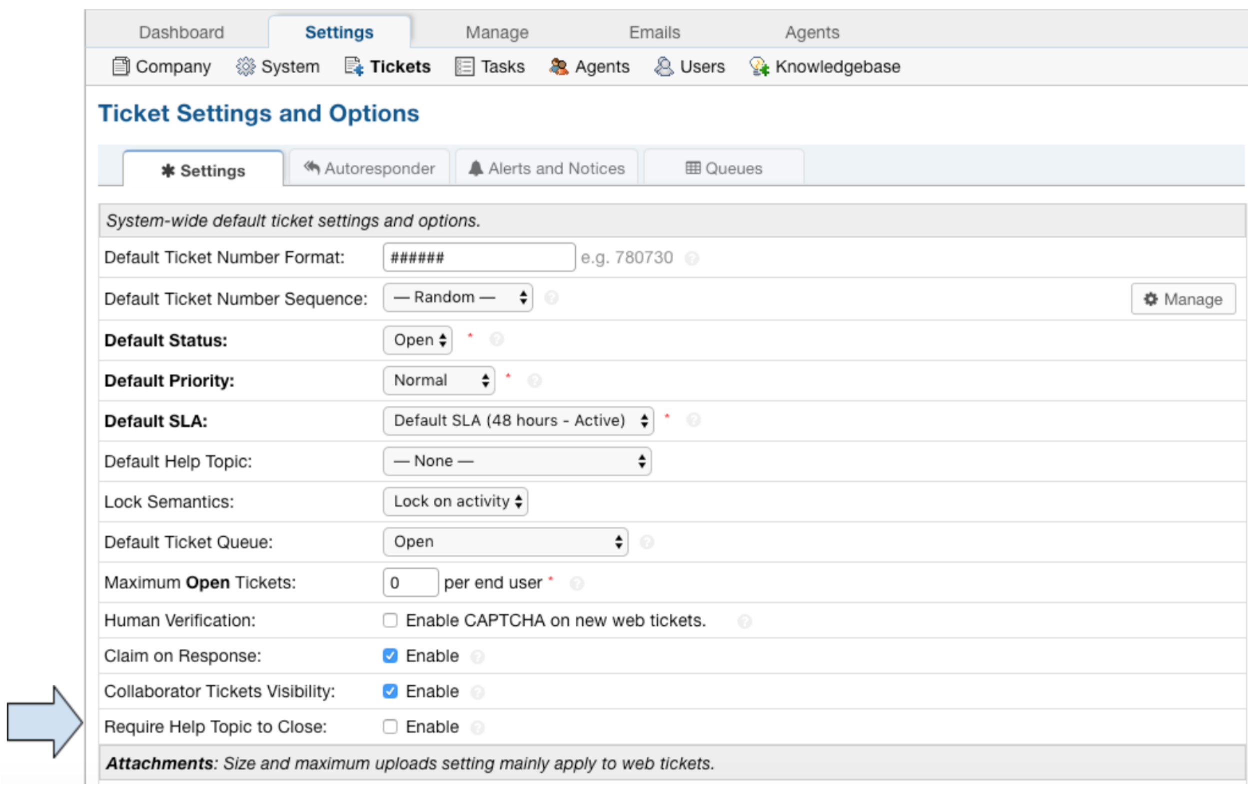
Require Help Topic

Admins now have the option to require a Help Topic before a Ticket can be closed.

By default, this setting is NOT enabled.

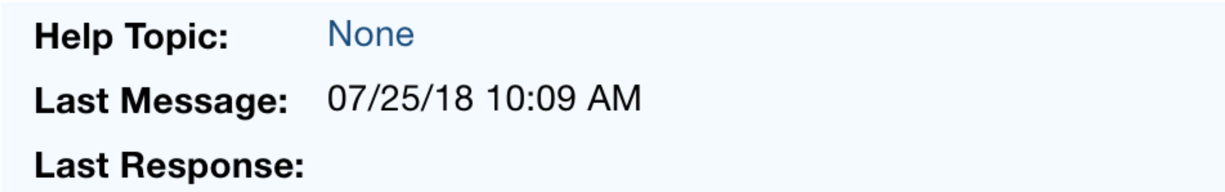
To enable this setting, go to:

Admin Panel | Settings | Tickets | Require Help Topic to Close

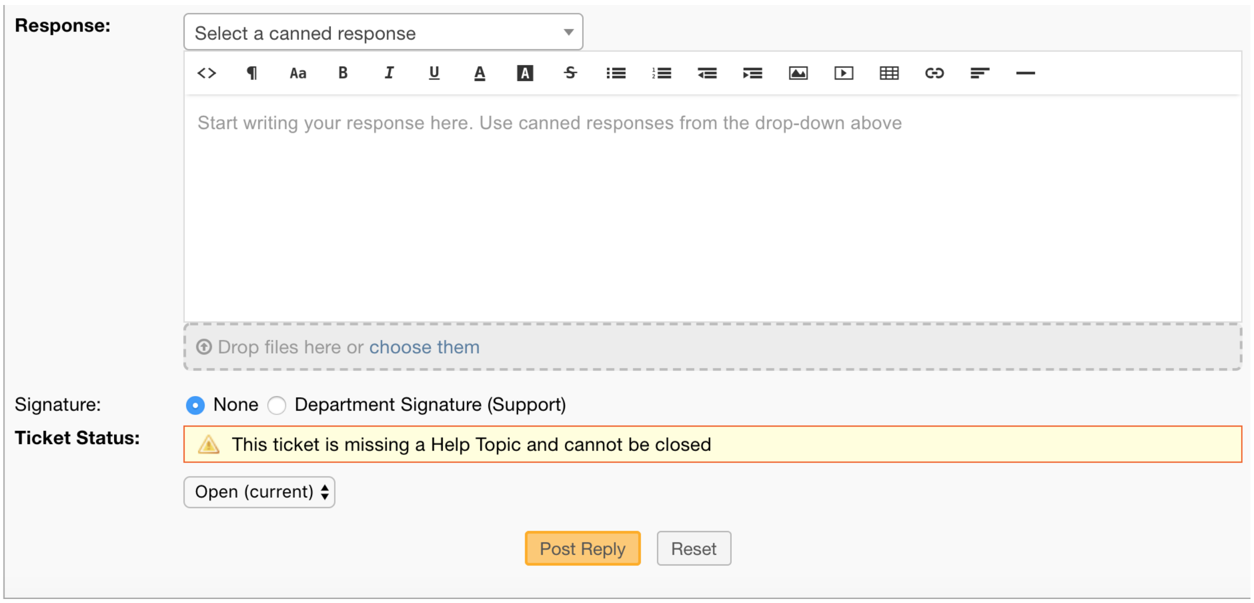


If enabled, Tickets without a Help Topic will have a warning banner across the bottom of the page, a warning when trying to change the Ticket status to Closed, and a warning flag beside the Help Topic field when editing the Ticket.

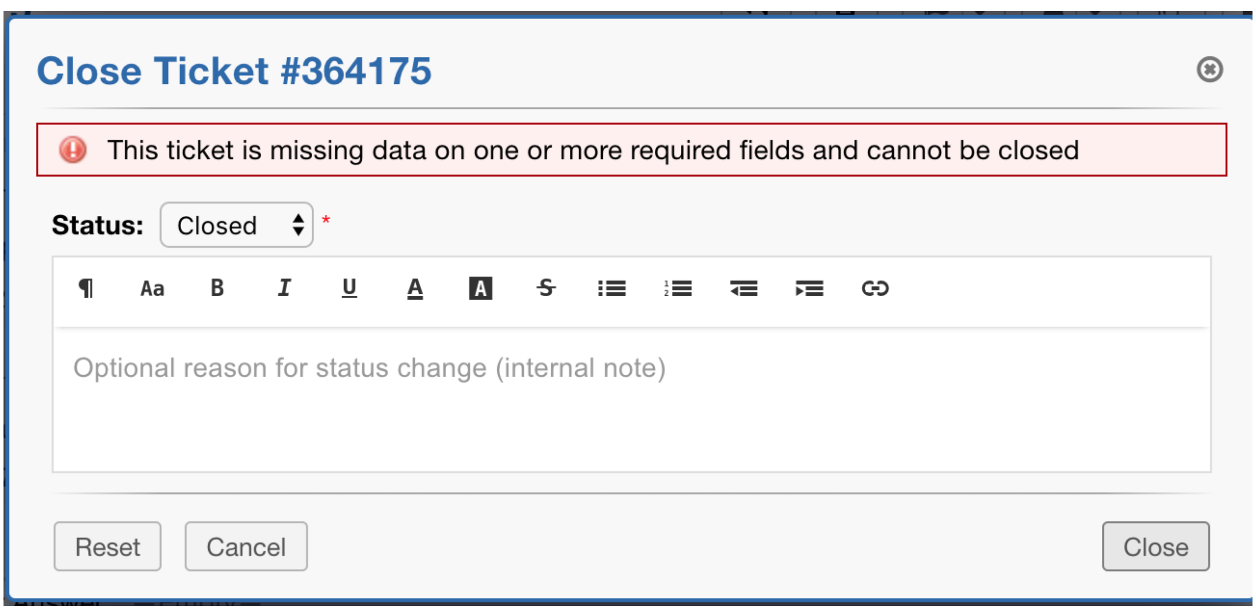
Ticket Without Help Topic:



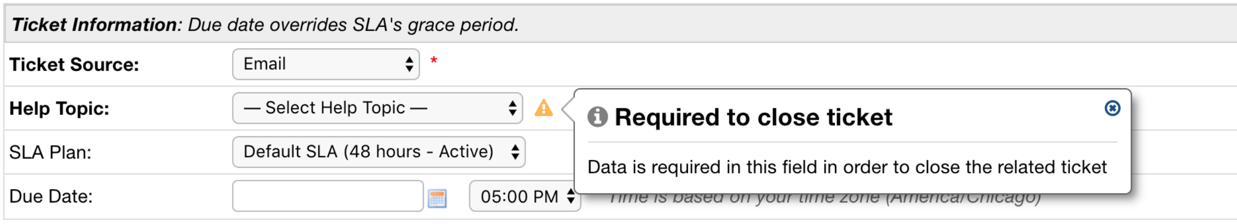
Ticket Warning Banner:



Status Warning Banner:



Edit Warning:


Ticket Information: Due date overrides SLA's grace period.
Ticket Source:
Email
Help Topic:
— Select Help Topic —
SLA Plan:
Default SLA (48 hours - Active)
Due Date:
05:00 PM
Time is based on your time zone (America/Chicago)
Required to close ticket
Data is required in this field in order to close the related ticket

CHAPTER 24

Task Revamp

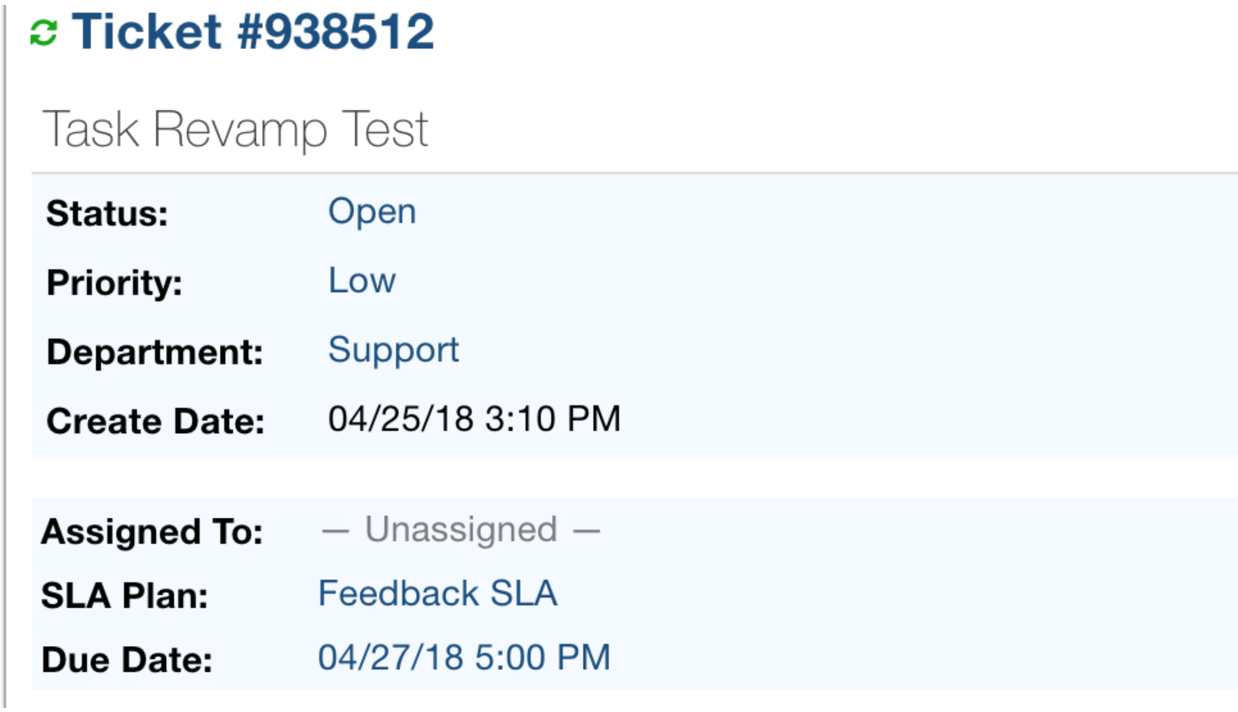
The Task Revamp improves upon the current functionality of tasks by adding the following:

1. Task due date must be before ticket due date
2. Add an Internal Note to the Ticket when a Task is completed
3. Send an Alert to the Assigned Agent/Team when task is complete

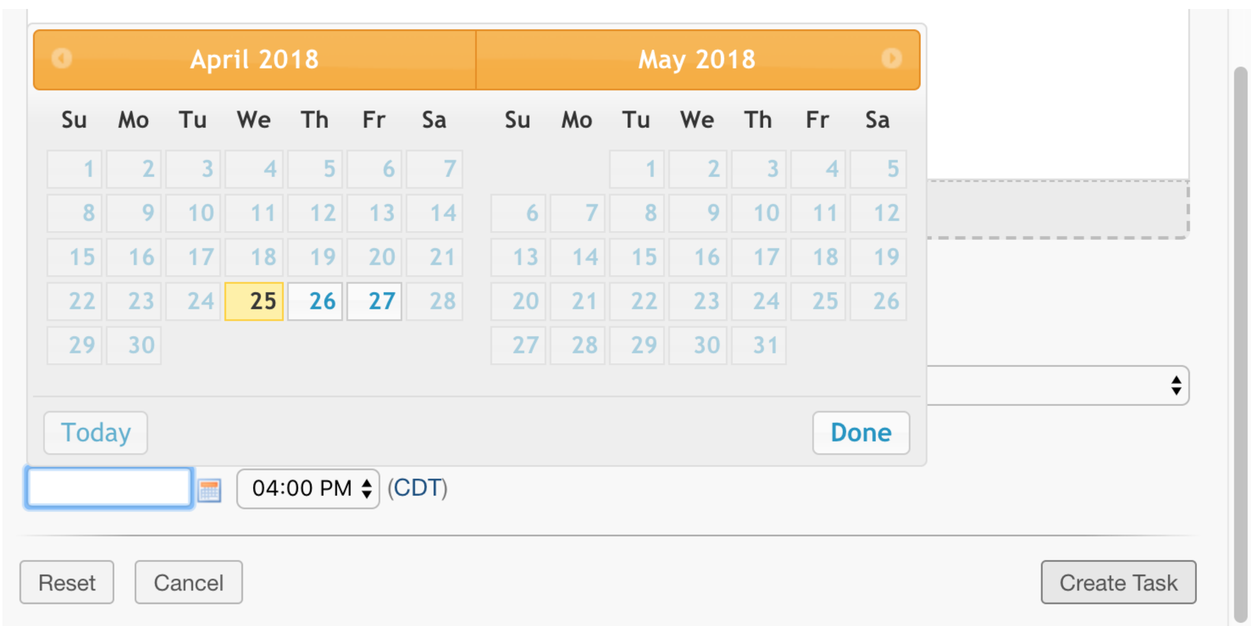
24.1 Task Due Date

When creating a Task for a Ticket, we now ensure that the Task's Due Date is before the Ticket's Due Date

Ticket Due Date:



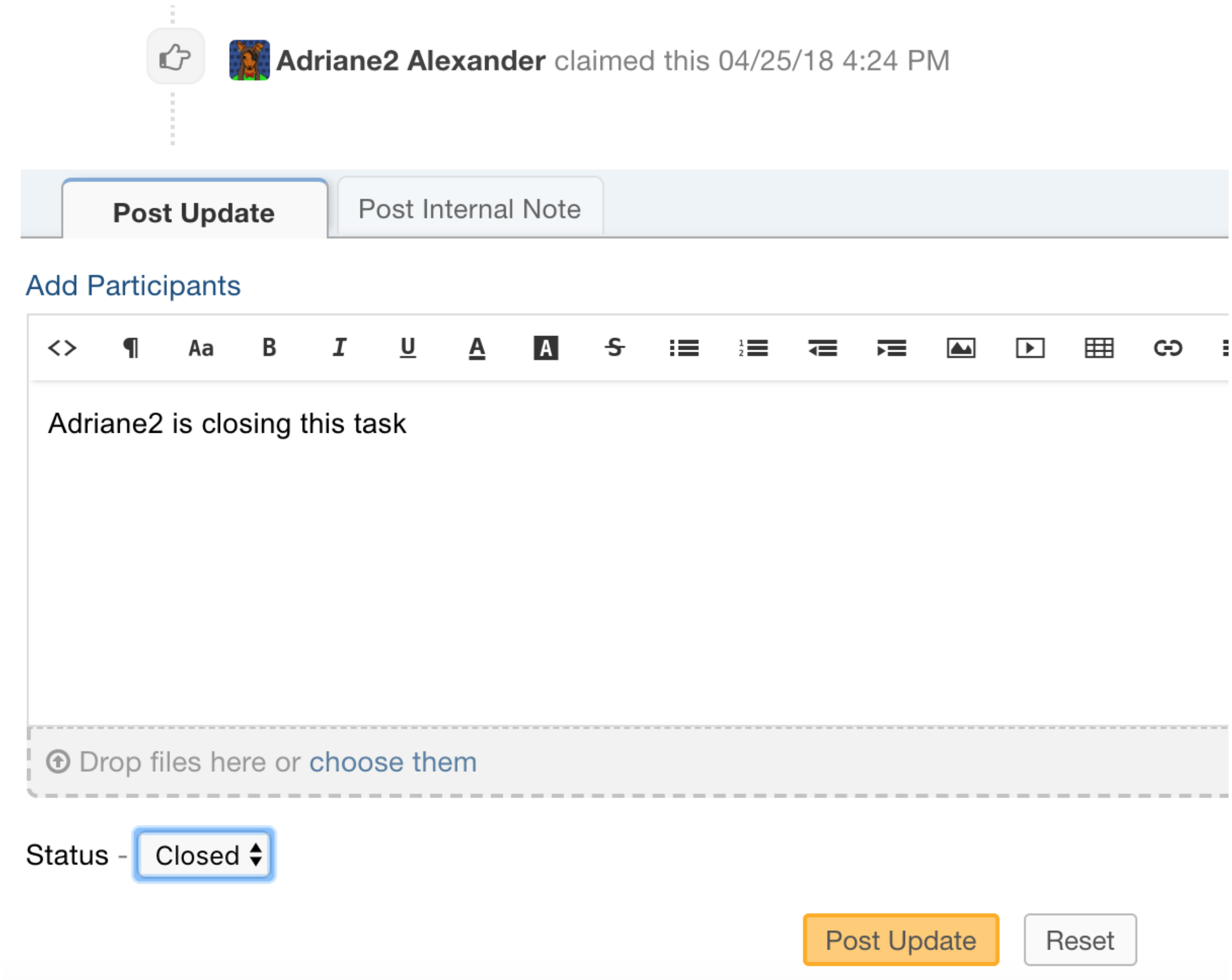
Task Due Date:



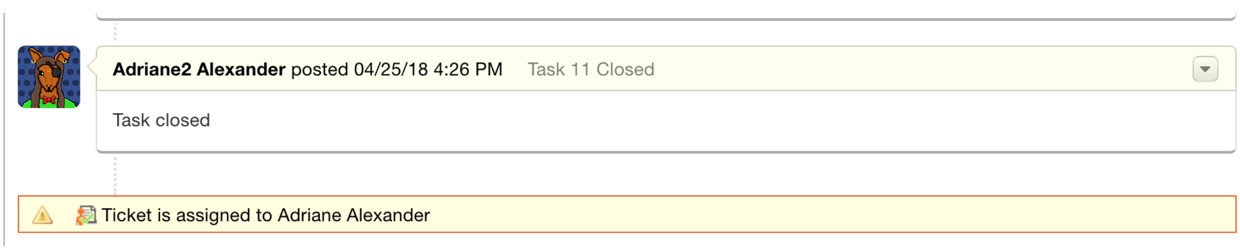
24.2 Internal Note

When a Task that is attached to a Ticket is closed, an Internal Note is attached to the Ticket.

Closing a Task:



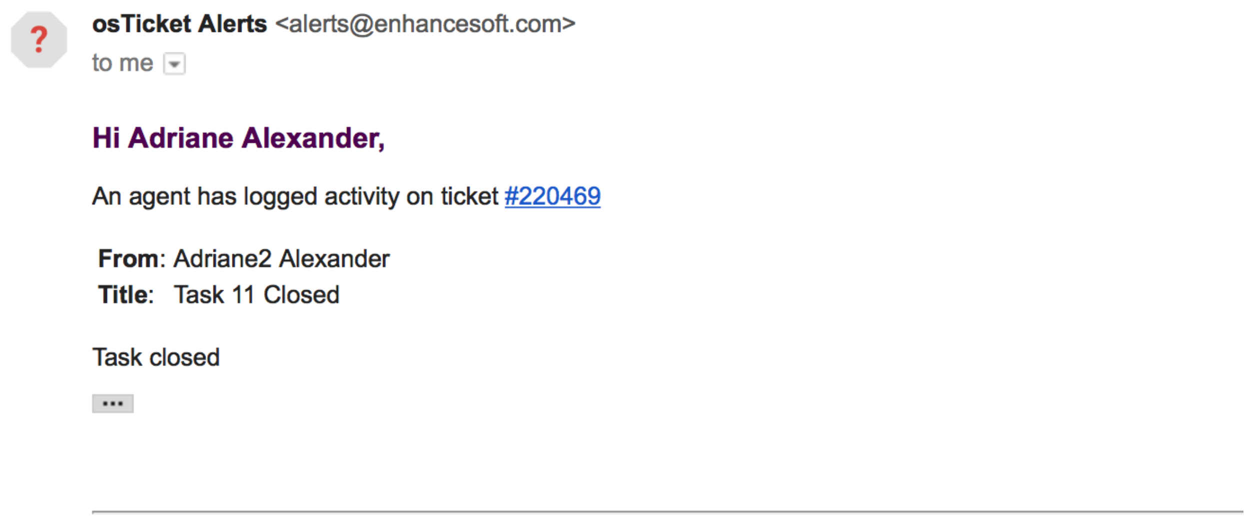
Internal Note:



24.3 Email Alert

Additionally, an Email Alert is sent to specified Agents if they are configured.

Email Alert:



***Note:** In order to get the email notification, a different Agent must be closing the Task.

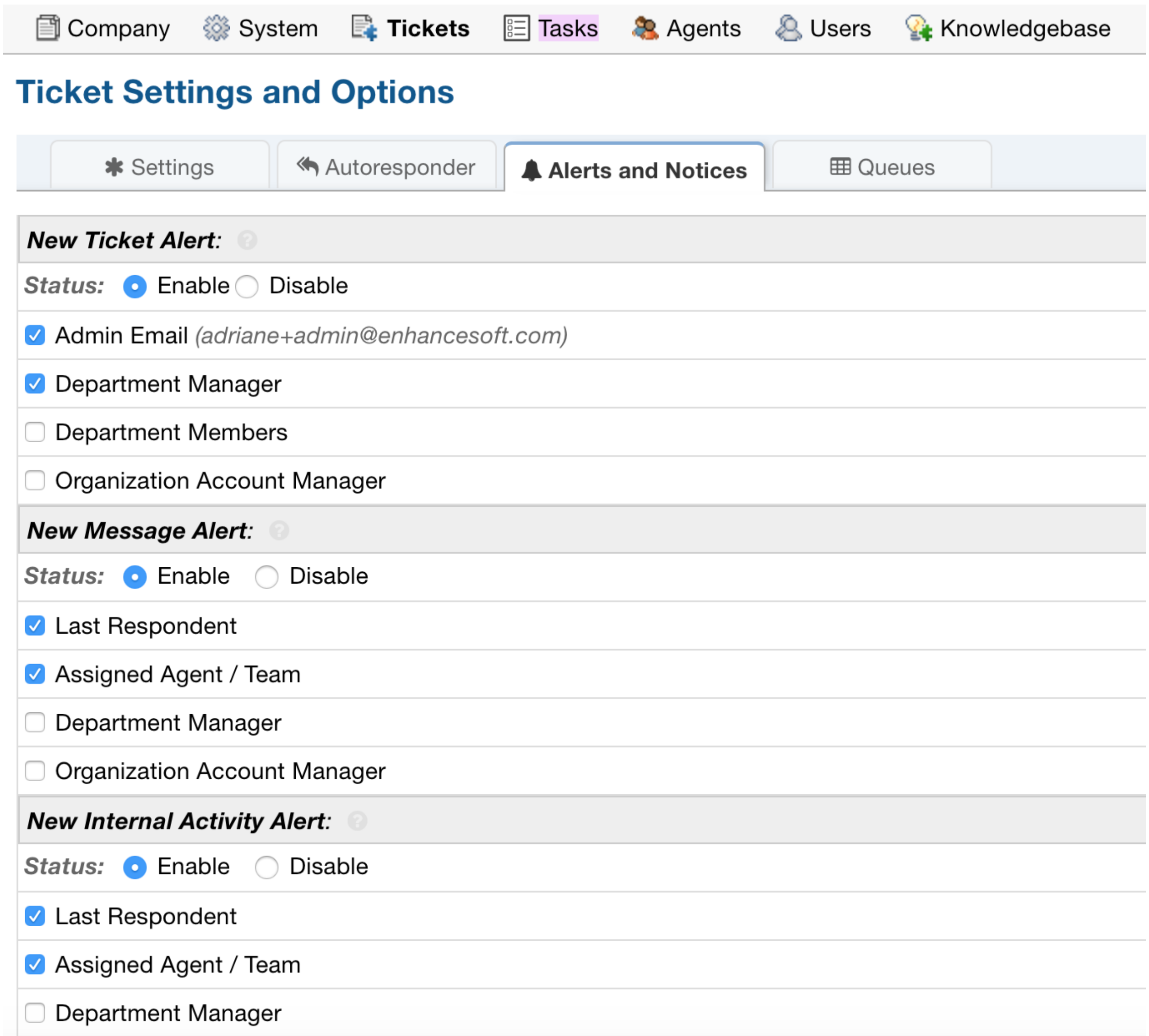
***Note:** In order to get the email notification, the proper Alert must be configured.

Since closing the Task creates an Internal Note on the Ticket, you must ensure that you have Alerts set up for Internal Notes.

To check the configuration, go to:

Admin Panel | Tickets | Alerts & Notices Tab

Make sure the ‘New Internal Activity Alert’ is Enabled and the desired Agents are checked to receive the Alert.


Company
System
Tickets
Tasks
Agents
Users
Knowledgebase
Ticket Settings and Options
Settings
Autoresponder
Alerts and Notices
Queues
New Ticket Alert:
Status: Enable Disable
Admin Email (adriane+admin@enhancesoft.com)
Department Manager
Department Members
Organization Account Manager
New Message Alert:
Status: Enable Disable
Last Respondent
Assigned Agent / Team
Department Manager
Organization Account Manager
New Internal Activity Alert:
Status: Enable Disable
Last Respondent
Assigned Agent / Team
Department Manager

CHAPTER 25

Ticket Referral

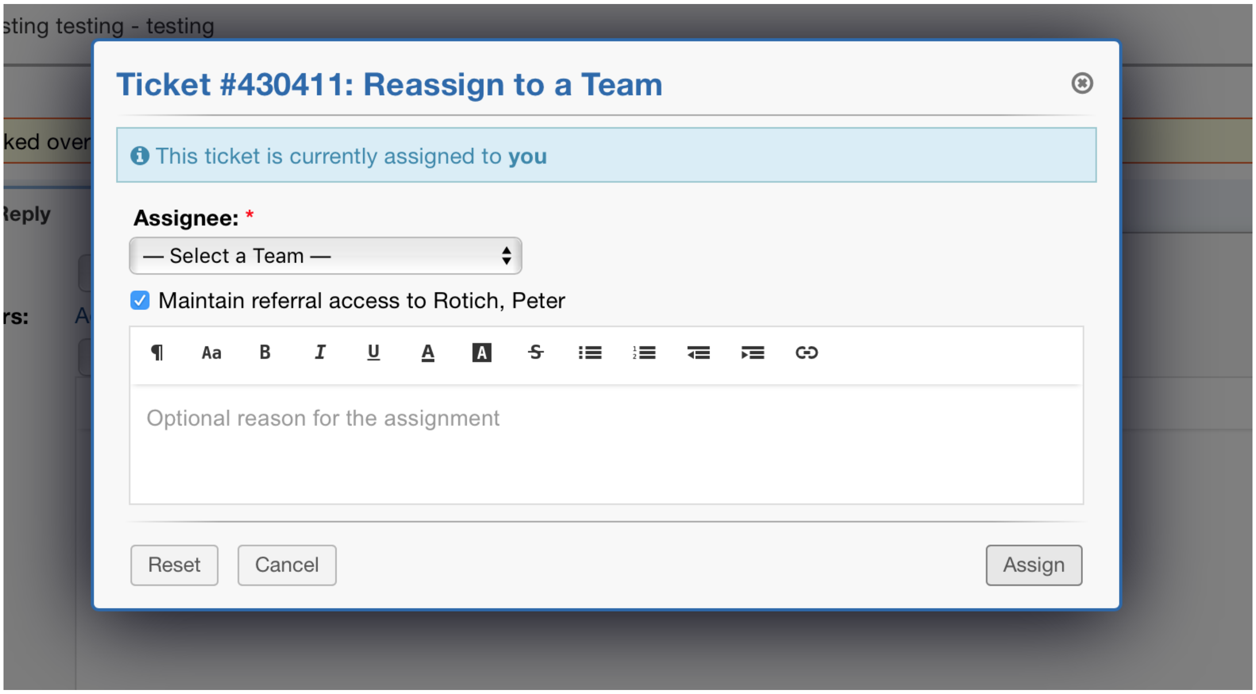
The ticket referral feature allows for the ability to refer tickets (& any associated tasks) to an Agent, Team or Department who otherwise do not have access. Referrals can also be used to retain view only access to the ticket once referred rather than losing access to the ticket.

The referred party only has view Role for the thread with the ability to post internal notes. It's important to note the ticket will technically still be the responsibility of the primary department and/or assignee. Transferring or assigning a ticket and unchecking the "maintain referral access" box in the pop-up is how an agent can relinquish the responsibility.

The permission to refer a ticket is tied to the Agent's role permission for tickets of the department and included within the ability to transfer and/or assign tickets.

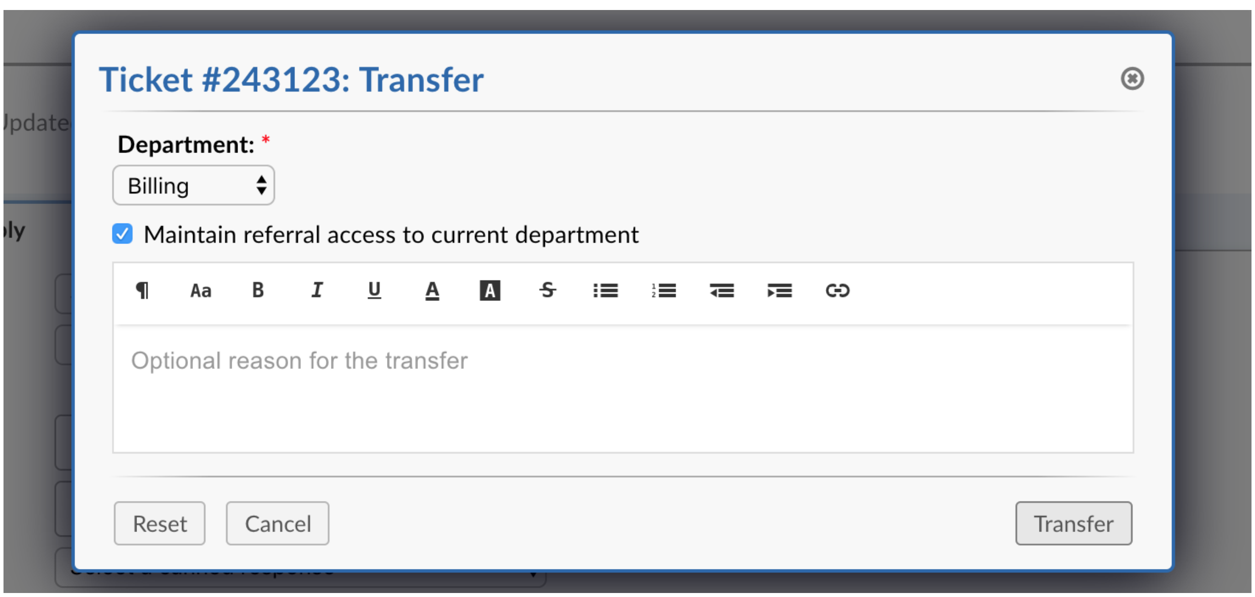
25.1 Agent & Team Referral

Referring a ticket to an Agent or a Team is just like assignment without actually assigning. The referee will only have a view Role and current assignees retain the responsibility of the ticket.



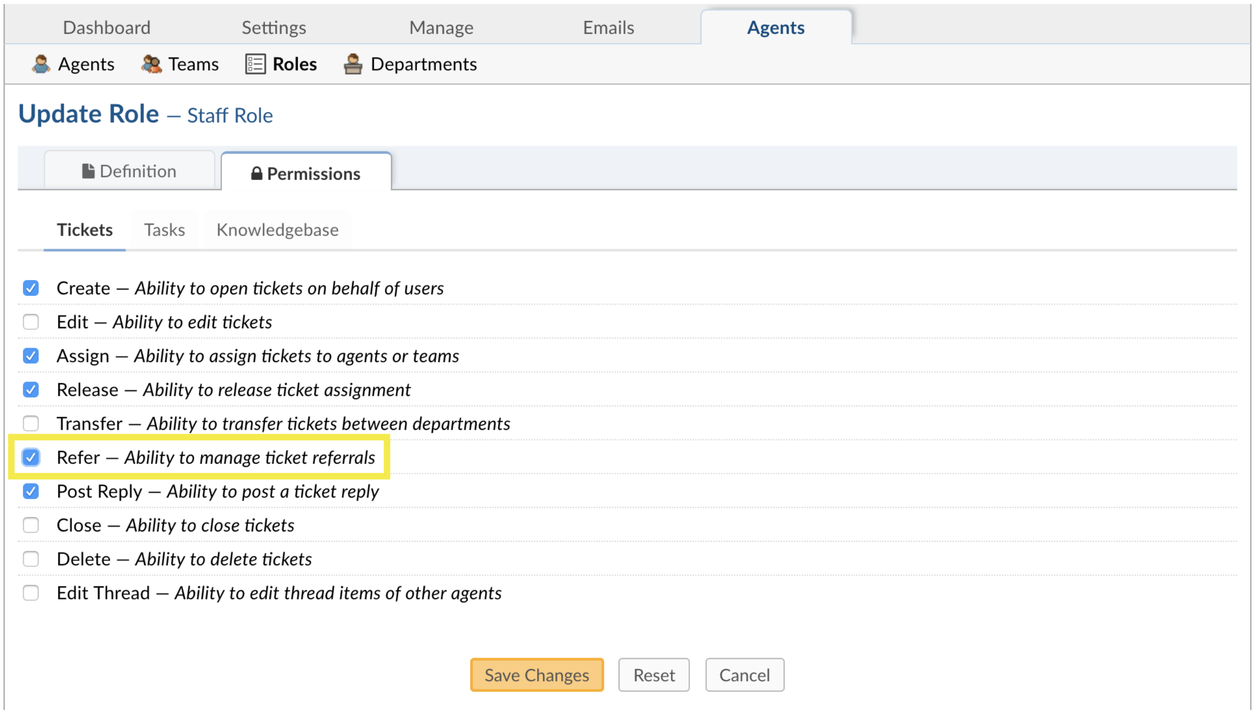
25.2 Department Referral

Department referral, unlike ticket transfer, is like assigning a ticket to the entire department. Meaning agents who have access to the referred department will be able see the ticket. What they can do with the ticket will depend on the their individual assigned role in the ticket's department, otherwise they'll have a "view only" Role.

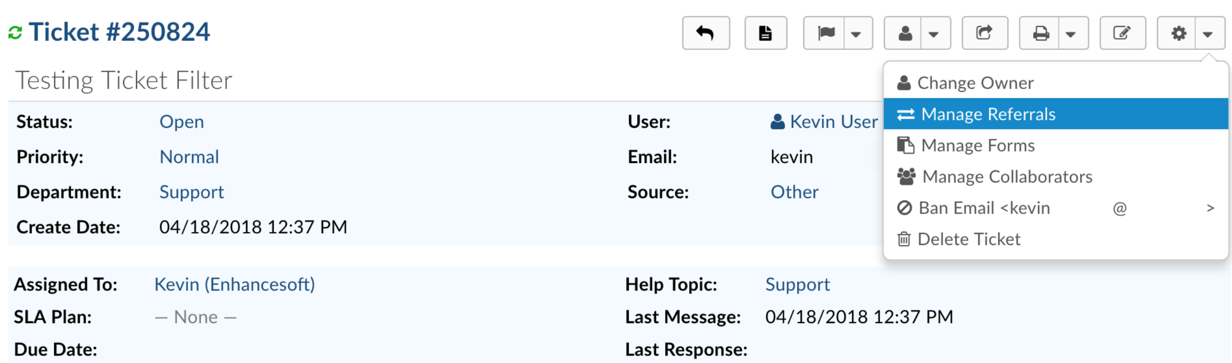


25.3 Managing Referrals

To Manage Referrals an Agent must have the Refer permission enabled in the Role for the Department they are referring from.



Ticket referrals can also be done independent of ticket transfer or assignments. This includes the ability to add new or remove prior referrals.



CHAPTER 26

Changelog

26.1 Version 1.12.2

Date July 26, 2019

Enhancements

- issue: Upgrader Wrong Guide Link (#4739)
- iframe: Allow Multiple iFrame Domains (#4781)
- variable: Complete Thread ASC or DESC (#4737)
- issue: Strip Emoticons (#4523)
- feature: ACL (Access Control List) (#4841)
- issue: Queue Sort Title No Validation Error (029b0f2)
- Issue: Tickets Visibility (60aa7b8)
- task: Implement edit of task thread (394ddee)
- Reformat Incorrect Reply-To Headers (e9dda94)
- DatetimeField: Add jquery-ui-timepicker-addon (dbff3b2)
- Add/Remove Collaborators Without Refresh (5a5044a)
- issue: v1.12 Git MAJOR_VERSION (3f80266)

Improvements

- issue: Maxfilesize Comma Crash (#4340)
- issue: System Ban List (#4706)
- queues: Fix compatibility issues with newer jQuery (#4698)
- filedrop: Fix file drag and drop (#4719)
- issue: PHP 7.2 Plugin Delete (#4722)

- issue: Local Avatar Annotation (#4721)
- Selected Navigation Item (#4724)
- Issue: Attachments on Information Fields (#4730)
- issue: No Save Button On Quicknotes (#4706)
- Issue: Duplicate Tickets in Closed Queue (#4736)
- issue: APC CLI (#4731)
- users: Fix seaching of users (#4741)
- issue: Custom Column Org Link (#4755)
- issue: Internal Note Ignored (#4745)
- issue: PHP 7.2 Ticket Status (#4758)
- issue: Canned Response Variables (#4759)
- issue: FAQ Search Results (#4771)
- issue: FAQ Return Errors (#4772)
- Queue Columns (#4785)
- issue: Duplicate Form Titles (#4788)
- Issue: Exporting Tickets (#4790)
- issue: Organizations Users Sort (#4806)
- issue: Multilingual FAQ Category w/ Parent (#4812)
- issue: Task Print PDF (#4814)
- Issue: MPDF Export PHP < 7.0 (#4815)
- Quick Filter Fixes: (#4728)
- Assignment Restriction Issue (#4744)
- Issue: Saving Checkbox Values (#4798)
- Issue: Choosing Fields to Export (#4797)
- oops: Thread Variable Fatal Error (#4820)
- oops: Emojis Strip Korean (#4823)
- issue: iFrame On Install (#4824)
- Issue: Ticket Export Headers (#4796)
- issue: Organization Ticket Export No Filename (#4825)
- MPDF Issues (#4827)
- issue: sendAccessLink On NULL (#4828)
- issue: sendAccessLink On NULL v1.11 (#4829)
- Update README.md (eccc57a, e5f4180)
- issue: iFrame Single Quotes (#4844)
- issue: Choice Validation Accept Punctuation (#4847)
- issue: ACL Move To Inc Files (#4848)

- Issues since v1.11 release (#4850)
- PJAX: Increase default timeout (#4855)
- Mime Decode - Encoded char (#4851)
- MPDF Tasks (#4856)
- issue: .eml/.msg Attachments (#4857)
- issue: Task EstDueDate (#4862)
- Bug fixes and enhancements for v1.11 (#4863)
- Mailer: Allow for ability to pass -f option as from_address (#4864)
- Ticket Link: Always return a link (#4865)
- Minor Fixes (e628373)
- issue: API Unexpected Data Warnings (4f68eb9)
- Double semicolon removed (bacd836)
- Empty extra in list_items (1309a6c)
- Issue: Ticket Alerts vs Dept Recipients (581f1f9)
- issue: iFrame Single Quotes (4b59b4f)
- issue: PDF Squares Instead Of Text (69c5095)
- issue: Class Format Disposition Misspelling (1d3f1a3)
- issue: README.md osTicket Logo (7121043)
- issue: README.md Image Size (8b90010)
- issue: DatetimeField Remove Unused Vars / Use parseDateTime() (d9aa91b)

Performance and Security

- xss: XSS To LFI Vulnerability (#4869)
- jquery: Update Again (#4858)
- Remove File Type Override (539d343)
- Validate integrity of uploads (eba6fb9)
- issue: Rogue Closing div Breaks HTML Thread Tree (3bb4c0a)
- xss: Install Form (c3ba5b7)
- security: CSV Formula Injection (9981848)
- security: HTML File Browser Execution (Windows: Firefox/IE) (33ed106)

26.2 Previous Releases

This documentation starts with osTicket version 1.12 ST and therefore does not contain the CHANGELOG from previous releases. If you would like to view the changes from previous releases please visit our Releases Page on Github.

26.3 Notes

For instructions on Upgrading your osTicket instance please visit our *Upgrade & Migration docs*. For instructions on Installing osTicket please visit our *Installation docs*.

CHAPTER 27

API

The osTicket API is implemented as (somewhat) simple XML or JSON over HTTP. For now, only ticket creation is supported, but eventually, all resources inside osTicket will be accessible and modifiable via the API.

27.1 Authentication

Authentication via the API is done via API keys configured inside the osTicket admin panel. API keys are created and tied to a source IP address, which will be checked against the source IP of requests to the HTTP API.

API keys can be created and managed via the admin panel. Navigate to Manage -> API keys. Use *Add New API Key* to create a new API key. Currently, no special configuration is required to allow the API key to be used for the HTTP API. All API keys are valid for the HTTP API.

27.2 HTTP Access

Access to the HTTP API is restricted to valid API keys. An `X-API-Key` HTTP header must be sent to indicate which API key is to be used with the request. The API key must match the remote IP of the connected HTTP client. The remote IP is checked as usual. If the osTicket server is sitting behind a reverse proxy, the original IP of the client will be retrieved from the `X-Forwarded-For` header, if provided by your proxy.

Example:

```
X-API-Key: BA00B76BAA30F62E1940B46CC1C3C73C
```

Commandline Example with Curl:

```
curl -d "{}" -H "X-API-Key: BA00B76BAA30F62E1940B46CC1C3C73C"
    https://support.you.tld/api/tickets.json
```

27.3 Wrappers

Currently, there are no wrappers for the API. If you've written one and would like it on the list, submit a pull request to add your wrapper.

27.4 Resources

Tickets

Tasks