

OTRS Adaptation
Functional Specification
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Overview

OTRS (Open Ticket Request System, also known as trouble ticket system, please see www.otrs.org) is a web-based programme with various functions for managing customer contacts (telephone calls, e-mails, etc.). The system was written to ease customer care, their daily business, accounting, internal IT dept., the Hotline and to get employees to react quickly to customer questions.

The OTRS adaptation specified in this document is used to better integrate OTRS into existing organisational structures.

This specification is in no way complete. The whole document needs to be overworked, before it can be seen as a final version. The pictures shown here (screenshots), are only used as a form of help to explain functional objectives.

Scenarios

Scenario 1: Peter Torwart

Peter is a hacker. His favourite hobby is to reconfigure his Linux-Cluster, with the help of pipes consisting of at least 5 to 8 filters, 3 of which are inline Perl scripts.

He earns his money by adapting various Open Source software packages to his clients' specifications. He has often installed OTRS and has had to make a large effort every time getting the clients' existing customer data into the OTRS. He is, of course, happy to get more contracts from his clients, but it annoys him to have to do silly little tasks like this all the time and he felt it was beneath his "position" to have to do such a job.

Peter often thinks about it and comes to the conclusion that it would save him a lot of problems if the OTRS had the possibility of getting into the clients' present customer data.

Scenario 2: Christa Gutmut

Christa is respected throughout the whole company, but nobody really takes her too seriously, however, nobody else wants to do her job. Without her, the company would not work half as well. Christa has been responsible for the customer problems for years and has been doing this so long that she can remember all the necessary knowledge, so that nothing could ever go wrong. Every morning she can be seen going through the offices, delegating the tasks amongst the workforce. The customers are happy.

Christa was always a bit suspicious of the computer, right from the first day she used it. She was highly impressed as Peter installed OTRS and patiently explained the system and the possibilities it brought with it. From this day on she tried to solve all her customers' problems with OTRS. If she was truthful, it did not get any easier to remember all the things with the years.

Soon she noticed that, "all is not gold that glitters", because although OTRS helped her in certain aspects, i.e. to connect the various problems to the contacts, an employee often changed positions inside a clients' company and she needed to remember a lot of details anyway.

What Christa desperately missed, was the possibility to display all the known contacts of a particular company, out of which she could then choose to match a new problem to.

Goals

As can be taken from the Scenarios, two extras functions should be implemented in OTRS:

- 1.Customer data already present in a company introducing OTRS should be accessible for assignment to the tickets and hence made directly available to the user / operator. Eventually it could be used for authentication, too.
- 2.If the available customer data structures include information about the company of the contact, it should be made available and presented on parts of the UI, giving the possibility to look up and / or reassign a contact from within the OTRS UI.

Non goals

This version should **not** include following goals:

- Creation of a new system to collect and care for customer data.
- OTRS should have read-only (and by-design not write!) access to already existing customer data bases of a company.

ToDo-Packages

a) Availability of existing customer data

The goal of this ToDo-package is that the customer data at the OTRS-using companys' site can be stored in a separate database. All of the extra system parameters must be configurable in the Kernel / Config.pm Perl modules. Following conditions are to be met:

- To comply with the interfaces in OTRS, all external customer data should be reachable via Perl::DBI or Perl::LDAP.
- The authentication of customers at the OTRS system should be done directly over the credentials in the OTRS database, therefore no changes or write access is necessary to any external database. Only the OTRS specific information in the OTRS' own database (Login, password, customer no., validity flag, etc.) can be managed and all other data or information comes/can come read-only from external database(s).
- The linking conditions (eventually an SQL statement) of the customer data to the external database must be configurable in the Kernel / Config.pm Perl modules. To make this link possible a link-ID will be saved in the OTRS database.
- The UI for customer user administration (Action=AdminCustomerUser) should also show the OTRS database own data as well as the information from external database (read-only!).
- The actual link between external data and customer data should also be available via the dialog for customer user administration

(Action=AdminCustomerUser) .For this an extra field (Combobox) is necessary to make all the data records from the external database visible that could be chosen.

Additional Elements (red)

Action=AdminCustomerUser:

OTRS :: CustomerUser add - Microsoft Internet Explorer

Anakin Skywalker (skywalker@otrs.org) Thu Sep 11 13:49:28 2003

Logout AgentFrontend

Users & Groups	Queues & Responses	System	Misc
[User]	[Queue]	[Salutation]	[Customer user]
[Groups]	[Responses]	[Signatur]	[POP3-Account]
[User <-> Groups]	[Responses <-> Queues]	[E-Mail-Adresses]	[Session management]
	[Auto-Responses]	[Character sets]	[AdminEmail]
	[Auto-Responses <-> Queues]	[Status]	[System Log]
	[Attachment]		[Select Box]
	[Attachment <-> Responses]		

[Kunden-Benutzer-Verwaltung]

Change customer user settings ändern:

sofia@netdios.net (sofia@netdios.net)

Change

Add customer user:

Salutation:

Firstname:

Lastname:

Login:

Passwort:

E-Mail:

Customer#:

Comment:

Valid: valid

QueueView refresh time: off

Language: English

Character set: iso-8859-1

Theme: Standard

Closed tickets: Yes

External customer: external customer data here

Add customer user

[Notiz]

Customer user will be needed to login via customer panels.

QueueView - PhoenixView

Powered by OTRS 1.1.3

Arbeitsplatz

b) Displaying a company

The goal of the implementation of this work package is to show common connection(s) between User-Client and other customer data. It should also be possible for any given ticket, to be able to assign a new contact person to it.

To display the company membership of a User-Client, it is necessary to add another field to the UI to connect the **(new)** contact to the company. (changes marked in red).

Formular Action=AgentCustomer:

OTRS :: Customer - Microsoft Internet Explorer

Anakin Skywalker (skywalker@otrs.org) Thu Sep 11 13:49:28 2003

Logout QueueView PhoneView Utilities Preferences Stats

You have 1 new message(s)

[Change customer of ticket: 2003090810000231]

Back

Set customer user and customer id of a ticket:

Customer User: joepoe@notsohotmail.com [Search Customer]

CustomerID: joepoe@notsohotmail.com

update

[Customer Data: joepoe@notsohotmail.com]

Salutation: Mr.

Firstname: j

Lastname: l

Login: joepoe@notsohotmail.com

Comment:

Company: Smilies Software Inc. [Search Company]

[Customer history]

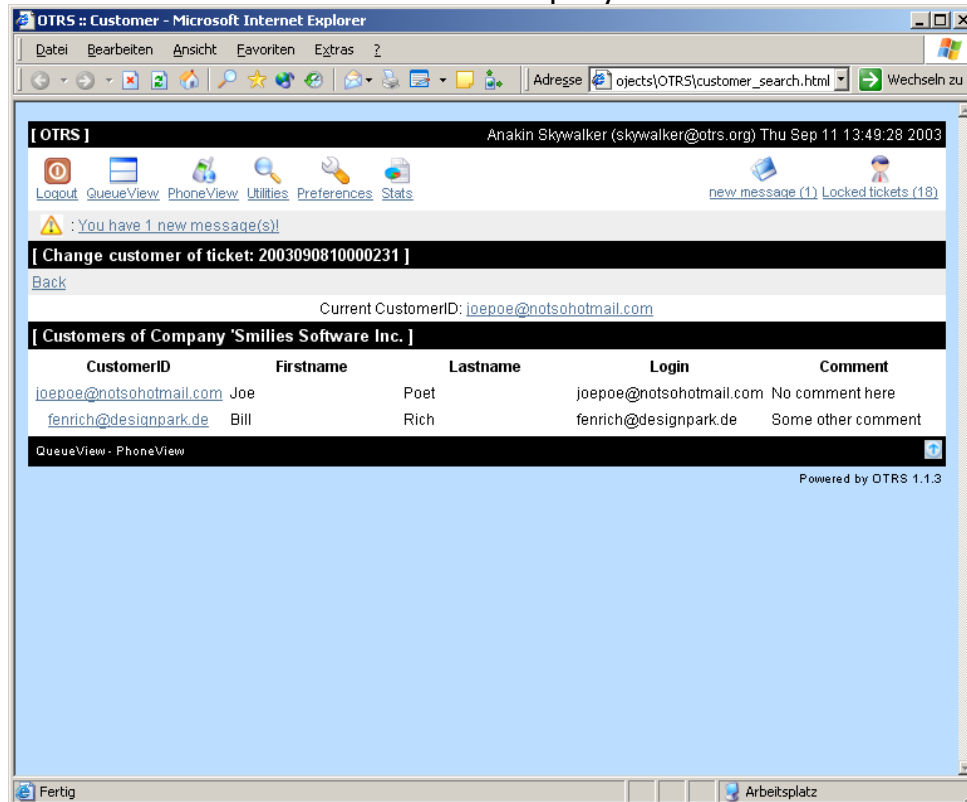
Ticket#	Article	State/Lock	Queue/Priority	Age
2003090810000231	From: j l <joepoe@notsohot[.]> Subject: Can I change this we[.]	State: new Lock: unlock	Queue: 3rd level suppor[.] Priority: 3 normal	2 days 23 hours

QueueView - PhoneView

Powered by OTRS 1.1.3

By clicking the link (in the example [Search Company]) a new UI page (Action= SearchCustomerCompany) should be shown.

Formular Action=SearchCustomerCompany:



This new page shows all known contacts for this company for a chosen User-Client. A click on the specific contact (Column !) opens the pages where the new contact, who should be connected to the actual ticket and this will be taken over as the new default for the Operator-Client.

Global Configuration

Following information must be globally configurable:

- Show company membership of an external contact (yes/no, fieldname in database).
- Parameters to configure an external customers' database (Database type, DSN, Username, Password etc.).
- Coupling to (connect to) external customers' data.