

User Manual for the Ticket System KIX of the University of Bonn

Software Version: KIX Professional 17

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This manual is the revised version for KIX Professional of the user manual for the ticket system of the University of Bonn. Suggestions and additions were taken from the OTRS user manuals of the Library and Information System of the University of Oldenburg and the Office for Organization and Information Technology of the City of Augsburg.

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Solutions for a Coordinated Support – General Information on the Ticket Systems

A ticket system enables several employees (agents) of an institution to process common processes (tickets) and to coordinate the processing procedure as efficiently as possible. A ticket can consist of several contributions (articles: communication processes, such as e.g. e-mails, notes, call notes). Even if these are sometimes created by different agents, the external appearance of the institution is uniform. All employees use a common e-mail address and answer with a uniform formatting and signature.

The requests are collected centrally and made available to the right agent in a largely automated process. In complex cases, the process can be routed through various instances within the ticket system without having to inform the person making the inquiry (customer). The communication flow of a case is summarised in a ticket so that the case history is available to each of the involved agents during processing. This means that everyone is informed at all times about the previous and, if necessary, already completed questions of a case.

In addition, a ticket system offers an archive of past cases that can be used as a knowledge base and provides a complete overview of the processed cases.

Basic Information about the Ticket System at the University of Bonn

Since 2009, the University Computer Centre has offered all facilities of the University of Bonn the use of a central ticket system based on the open source software OTRS (Open Ticket Request System).

In February 2020 the ticket system was migrated from OTRS 5 to KIX Professional 17, which brings only minor changes in the operation of the ticket system, but also provides some helpful innovations. The ticket system can be reached under the address ticket.uni-bonn.de. The login for registered agents is done with the personal Uni-ID and the corresponding password.

The ticket system is divided into several ticket queues (Queues), which represent the different areas of responsibility. An agent can have different role-based access rights to queues and use them accordingly. For example, an agent usually only has read and write access to the tickets in the queues for which he/she is directly responsible within the scope of his official tasks.

For students and staff (Customers), the internal structures of the university and its institutions are often not immediately apparent and often irrelevant. As a result, inquiries are sometimes sent to the wrong address. Furthermore, it may be necessary to investigate a problem in different departments. Agents can therefore move tickets from their queues to other queues and leave notes in them, thus assigning them to another department and at the same time communicating the findings already made.

Structure of the Ticket System

The ticket system is currently divided into seven main queues, which in turn consist of many sub-queues. In the table below, only a few examples of sub-queues are listed to make the structure clear.

Main Queue	Definition	Important Sub-Queues	
		Queue	Definition
Administrative	Administration of the ticket system	Administrative::OTRS Administration	Administrative inquiries about the ticket system
		Administrative::Clearing	Queue for incorrectly assigned tickets. If a ticket has landed in the wrong editing area and there is no possibility to move it to the appropriate queue or it is unknown, these tickets will be moved here. Here the ticket is then forwarded from a central location to the correct institution.
		Administrative::Junk	Queue for junk emails. The e-mails in this queue are moved to a trash bin by the HRZ IT-Helpdesk. After 30 days they are automatically deleted and irretrievably removed.
		Administrative::Vault	Queue for tickets with confidential content. In this queue own tickets can be archived up to 4 weeks after closing. Since they can then only be viewed by ticket system administrators, tickets should only be moved to this queue in exceptional cases. Please note that the ticket system does not allow requests for a ticket in this queue. Should a customer have a request for a ticket in this queue, it will be added as a new ticket.
Facilities	Queues of the institutions participating in the ticket system are displayed below according to the university structure.	Here are just a few examples	The complete list can be found and called up at www.hrz.uni-bonn.de/de/services/e-mail/otrs/administrationsformulare-1/einrichtungen-in-otrs
		Facilities::BZH	Enquiries to the Bonn Centre for Higher Education Teaching
		Facilities::University Sport	Inquiries about the university sport

Main Queue	Definition	Important Sub-Queues	
		Queue	Definition
Faculties	Queues of the faculties participating in the ticket system are displayed below according to the university structure.		A complete list can be found and called up at www.hrz.uni-bonn.de/de/services/e-mail/otrs/administrationsformulare-1/einrichtungen-in-otrs
HRZ	The main queue of the University Computer Centre is divided into the different departments of the HRZ. These in turn are subdivided according to areas of responsibility.	HRZ::Infopoint	General inquiries to the IT-Helpdesk (formerly InfoPoint) of the University Computer Centre
		HRZ::User Support	Inquiries to the HRZ User Support Department
		HRZ::APSys	Inquiries to the HRZ Workplace Systems Department
		HRZ::Networks	Inquiries to the Network Department (e.g. Bonnet, WLAN, DNS)
		HRZ::Server::Operation	Operational inquiries about server systems of the HRZ
		HRZ::Server::Plone	CMS support of the university
Cross-institutional		Inter-institutional::Basis	Inquiries about the electronic course catalogue of the University of Bonn (BASIS)
		Inter-international::eCampus	Inquiries about the e-learning platform of the University of Bonn (eCampus)
Administration	Queue of the University Administration		
Events	Under the main queue, business events are entered, some of which are periodically recurring, some of which are on-off events. The planning staff of the respective business event can organise incoming inquiries, registrations, etc. here.		

If inquiries are in queues with incorrect areas of responsibility, they should be moved to the most appropriate queue, provided the responsible institution is represented in the ticket system.

In order to avoid additional work due to unnecessary tickets, tickets should only be forwarded to e-mail addresses that are not retrieved by the ticket system.

Use of the Ticket System

To use the ticket system of the university, please contact us at ticket@uni-bonn.de.

The University Computer Centre will advise you on how the ticket system can be used most effectively and then set up the desired queues, create agents with the desired roles, etc. with a ticket manager appointed by you.

As soon as the setup is completed, all named employees can log on to the ticket system and perform the specified tasks.

Change Requests

For change requests (queues, new agents, standard responses), the respective agents must contact the ticket manager of their institution. Only this person is authorized by the University Computer Centre to accept change requests.

These can be requested by the person responsible for tickets by e-mail to ticket@uni-bonn.de.

Trainings

The University Computer Centre regularly conducts training courses on the use of the KIX ticket system if required. A support page is available at <https://www.hrz.uni-bonn.de/de/services/e-mail/Ticketsystem>.

Definition of Terms

Term	Definition
Agent	Agents are distinguished between the editor and the person responsible for a ticket.
<ul style="list-style-type: none">• Editor (formerly Owner)	The current editor of a ticket or the person who edited the ticket before it was released.
<ul style="list-style-type: none">• Responsible	The responsible person can specify employees who are allowed to edit the ticket or edit the ticket themselves. They will also be notified when the ticket is edited. By default, the admin user "Admin KIX" is preconfigured as the responsible person.
Admin	A person who has admin rights in KIX.
Queue	Similar to the Inbox folder in standard e-mail programs. Several different queues allow incoming tickets to be categorized.
Ticket	Describes an incoming transaction/article including the resulting work steps.
<ul style="list-style-type: none">• Article	Describes a work step within a ticket.
<ul style="list-style-type: none">• Priority	Tickets can be of varying degrees of urgency. These are indicated by traffic light colours.
<ul style="list-style-type: none">• Status	Indicates the current processing status of a ticket.

User Interface of the Ticket System

After logging in, a personal overview page is displayed first, the user interface, which contains the following elements:

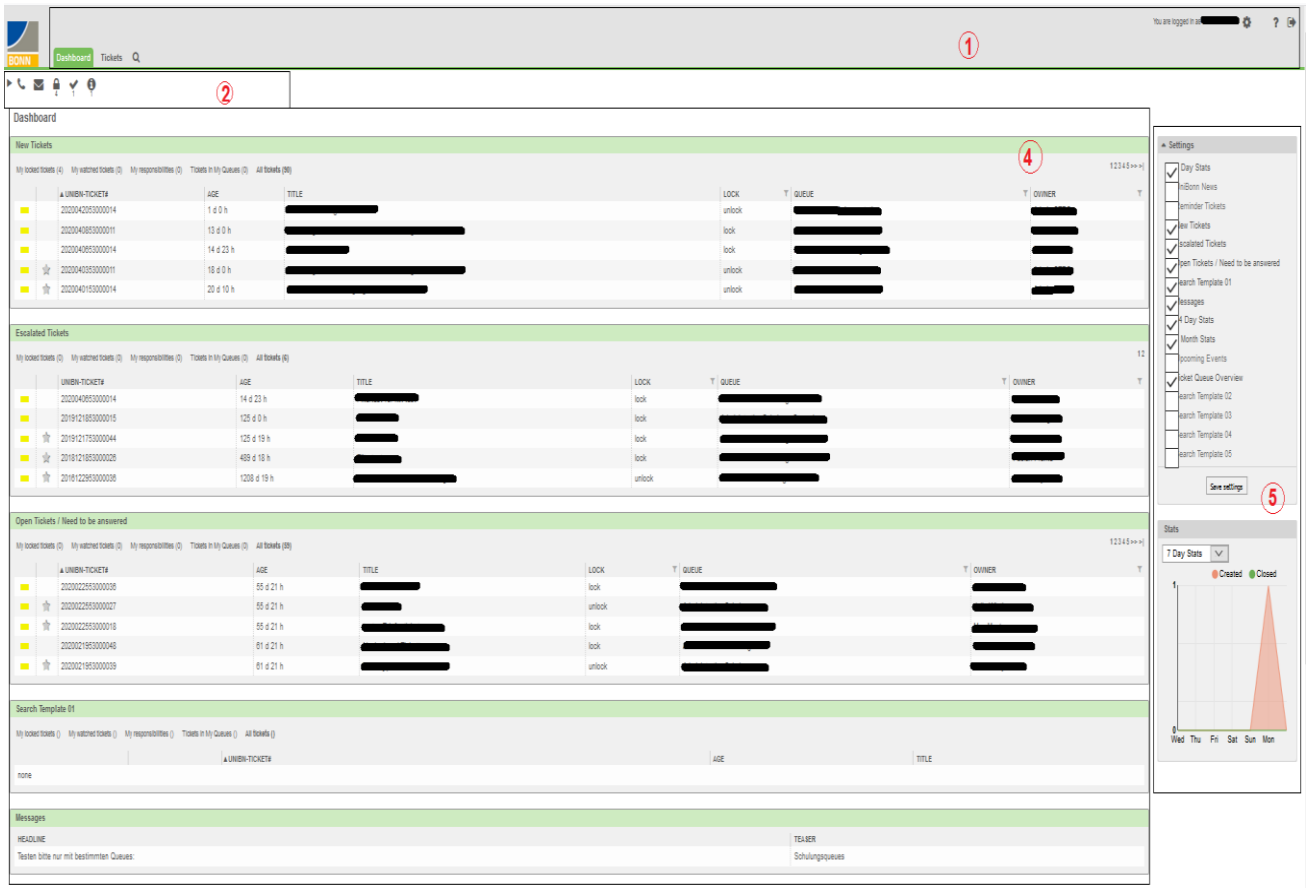


Figure 1: Dashboard

① Menu bar

② Toolbar

③ Information bar

displayed under the toolbar



④ Content area





⑤ Sidebar

Menu Bar

At the top of the screen is the menu bar, which contains different menus and buttons depending on the installed KIX modules.

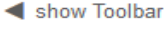

If you move the mouse pointer over a menu item, a drop-down menu with different, module-dependent menu items appears. A left mouse click activates the selected menu item.

In addition to the main menu, the menu bar also includes other elements:

- Main menu: Overview, Tickets and Search 
- Login: Registered as
- Control: Personal settings 
- Control: Help 
- Control: Logout Button 

Toolbar

By default, the toolbar is displayed or hidden at the left margin. You can edit the default settings via the “*Personal Preferences*”.




-  shows the toolbar
-  red bordered triangle hides the toolbar








The number of icons in the toolbar varies greatly, as most icons are only displayed if a ticket exists for this type.



Figure 2: Toolbar of an Agent who works a lot with the Ticket System.

These symbols quickly take you to the tickets defined in more detailed below:

	Creation of a new phone ticket (always visible)
	Creation of a new e-mail ticket (always visible)
	New tickets for which the registered agent is responsible. Full access to this remains, even if the ticket is in a foreign queue.

	All tickets for which the registered agent is responsible. Full access to this remains, even if the ticket is in a foreign queue.
	Tickets that are locked by the logged in agent and have received a new message.
	Tickets that have been locked by the logged in agent.
	Tickets that have been marked as important by the logged in agent.
	Tickets that the logged in agent has set to watch.
	Tickets that have been marked as ToDo by the logged in agent.
	Tickets with unfinished checklist entries.

Information Bar

The information bar is located below the toolbar and displays system messages with different colours.

For example, if the user settings are changed, these are displayed in the information bar.

Preferences updated successfully!

On the right, the bar can be closed with this  . When you log in again, it is displayed at the next system message.

Content Area

The content area adapts to the respective selected menu item. A distinction is made here between “*Content Area – Dashboard*” and “*Content Area – Tickets*”.

Content Area – Overview

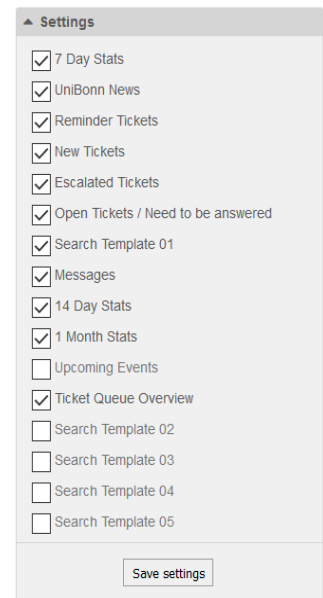
In the “*Dashboard*” menu, the content area is by default divided into four different ticket overviews, which displays the relevant tickets according to the user role, the “*Message of the Day*” and a “*Search Template*”.

To the right of these is the “*Sidebar*”. The overview can be adjusted via the “*Settings*” command from the sidebar. By dragging the mouse within the headline of a widget, the order of the widgets can be changed.

The following ticket overviews are distinguished:

- New Tickets
- Open Tickets/Need to be answered
- Reminder Tickets
- Escalated Tickets

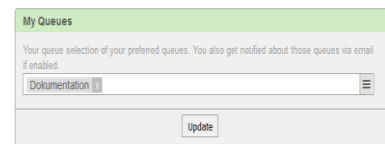
By default, the respective widget displays the corresponding tickets of all queues to which the agent has the rights. This can be changed using the selection menu in the widget.




My locked tickets (0) My watched tickets (0) My responsibilities (0) Tickets in My Queues (0) All tickets (0)

Figure 3: Selection Menu

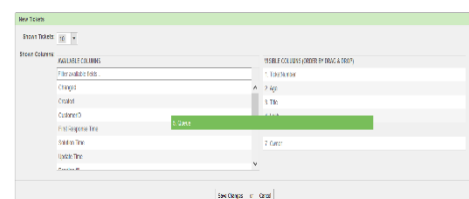
For example, under “*Tickets in My Queues*” only those tickets are displayed that are selected as “*My Queues*” in the “*Personal Preferences*”.



By default, the ticket overviews show the *Priority*, *Read Status*, *Ticket Number*, *Age*, *Title*, *Lock*, *Queue*, and *Owner* for each ticket listed.

In the upper right corner of a widget, the available pages are displayed if the number of available tickets exceeds the number of tickets to be displayed per page. Click on the corresponding page number to display the other tickets. The number of tickets to be displayed per page can be changed in the widget settings. To do this, move the mouse over the widget’s header so that the gear wheel  for the settings becomes visible.

In addition, the columns to be displayed can be changed here by dragging the area from the “*Available Columns*” to the “*Visible Columns*” area, or vice versa.



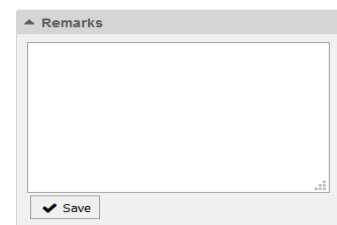
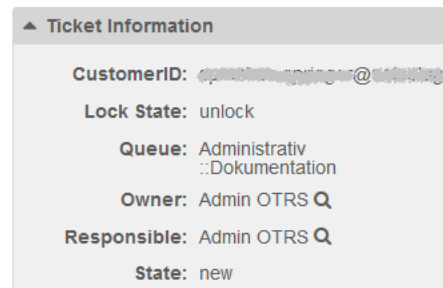
Within a widget, each column can be sorted in ascending or descending order, simply by clicking on the column name.

Furthermore, there are columns with a filter symbol, so that they can be additionally filtered by certain criteria. If the filter is displayed in colour only the criteria corresponding to the filter are shown.

By clicking on the ticket, it will be opened and can be edited directly.

If a ticket is selected in the content area, the sidebar changes and displays the following widgets:

- **Ticket Information:** all important information about the current ticket, which can be changed via the “*Edit*” ticket tab.
 - Customer number
 - Lock status: free/locked
 - Queue
 - Processor
 - Responsible person
 - Status
- **Checklist:** The checklist can only be created, changed, and processed by the **current user**. To create and change the checklist entries, move the mouse right over the heading of the “*Checklist*” widget to display the gear wheel for editing.
- **Remarks:** Here you can enter remarks on the ticket, which, unlike notes, can be changed or deleted at any time by anyone who has permission for the queue.



Content Area – Tickets

The following views can be set in the menu bar using the “*Tickets*” command:

- Queue View
- Status View
- Escalation View

View according to Queues

All new and open tickets are listed here, ordered by the queues available for the agent. Closed tickets can only be found using the search function.

The view is updated automatically (default setting: every 10 minutes).

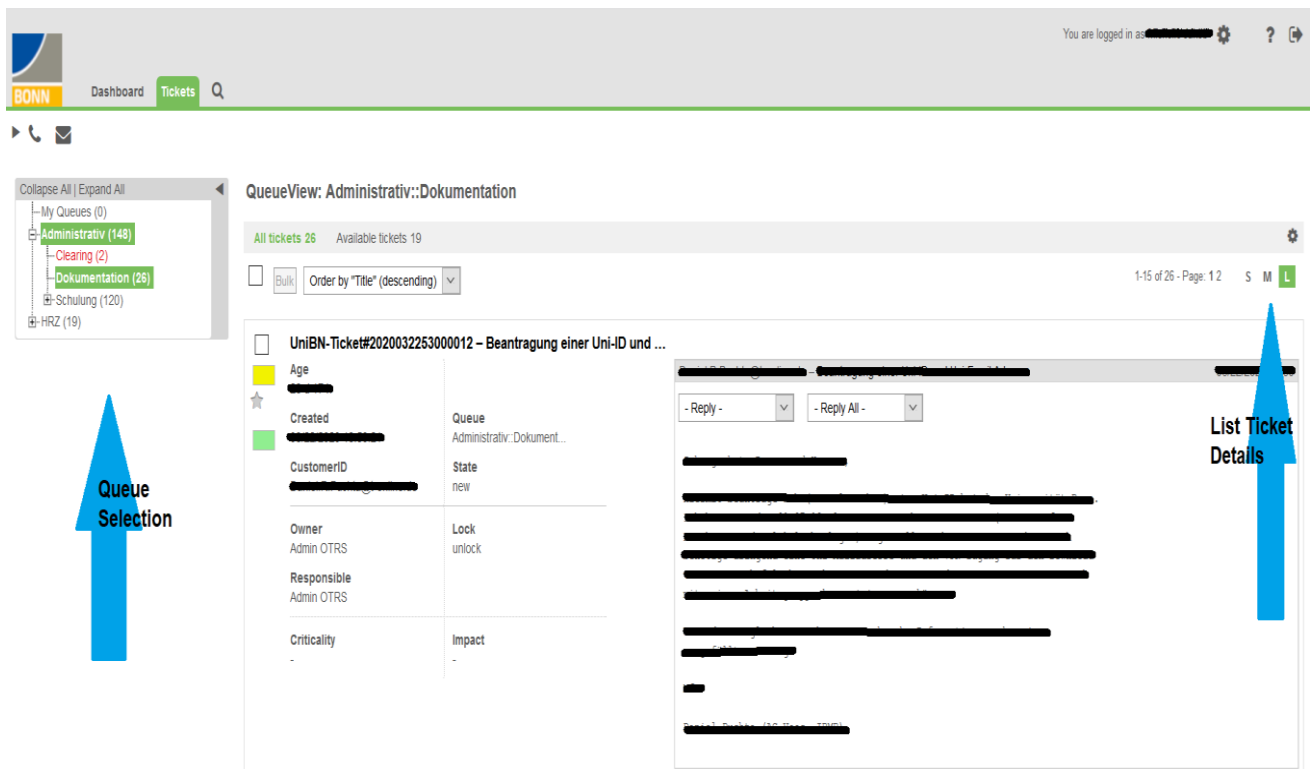


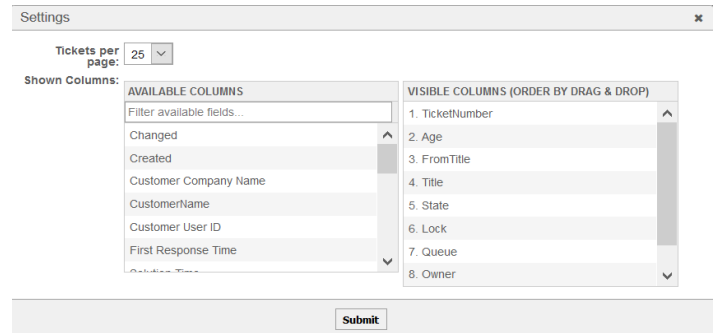
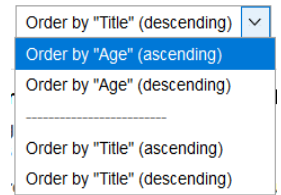
Figure 4: View by Queue

The following options and functions are available in this view:

- **Queue selection:** On the left, there is a drop-down menu with the following items:
 - **My Queues:** contains all tickets in the queues that have been assigned to “My Queues” in the “Personal Preferences”.
 - **My tickets (all):** contains all tickets that are currently being processed by the logged in editor.
 - **My Tickets (open):** contains all tickets with the status “Open” currently being edited by the logged in editor.
 - **My Search Templates:** contains all tickets of a saved search template (only visible if search templates have been created).
 - **Tree Structure of the Queues:** Here are all queues listed for which the logged in agent has the permission. You can switch to the individual queues using the tree structure. Under “My Queues” you can return to your preferred queues from any point.

The numbers next to the queues, separated in brackets by a slash, indicate how many open tickets exist in the respective queue and its sub-queues and how many are available.

- **Selection Menu for Sorting:** The drop-down menu allows you to select sorting by “Age” or “Title”, both ascending and descending.
- **View Settings:** After clicking on the gear symbol on the right side of the title bar you can select how many tickets should be displayed on one page. In the ticket list detail level S you can also select the columns to be displayed.
- **Ticket List Details:** To set how much information the view of the selected queue should contain; three predefined list are available:




- S: Tabular display of ticket data (customisation of columns and ticket filters possible)
- M: Detailed ticket data
- L: Detailed ticket data with a preview of the ticket
- **Detailed Ticket Data:**
 - **Queue:** In this field you can see to which queue the ticket is currently assigned.
 - **Priority Display:** The small rectangle on the side shows the priority assigned to the ticket in colour. Yellow for example shows the medium (normal) priority, there are two lower and two higher priority levels. A star below the priority display indicates that the ticket contains articles that have not yet been read:
 - Yellow star ★ → you are the editor
 - Grey star ★ → another one is the editor
 - The green rectangle below the symbols, described above, indicates that the ticket has not yet been processed.

In the ticket list detail view L you can reply directly to the ticket in the preview, but in the other views the ticket must first be opened by clicking on the ticket number.

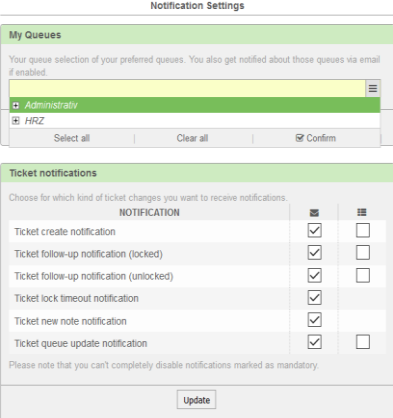
If the “*Tickets*” menu is used to sort by either “*Status View*” or “*Escalation View*”, the information is identical to “*View by Queue*”, except that the tickets are selected according to the corresponding criteria.

Personal Preferences

Each agent can adjust settings for his own user account in the “Personal Settings” in the menu bar via the gear wheel .

The settings are divided into three columns:

- **User profile:** Here you can adjust the language and the behaviour of some elements. You can also enter your own absence here to let other agents know why you are not responding. In addition to entering the absence, you can now specify a substitute who receives the ticket notifications of the absent agent.
- **Notification settings:** Here the preferred queues of the agent logged in are selected via “My Queues”. These can be multiple queues, which are selected via the drop-down menu and then added via the “Update” button. The ticket notifications below only refer to the tickets in “My Queue” and are useful for those who rarely work with the ticket system, as this way a change is notified by e-mail.
- **Other Settings:** Here for example, the colour scheme of the ticket system can be changed.



Notification Settings

My Queues

Your queue selection of your preferred queues. You also get notified about those queues via email if enabled.

Administrativ
HRZ

Select all Clear all Confirm

Ticket notifications

Choose for which kind of ticket changes you want to receive notifications.

NOTIFICATION	<input type="checkbox"/>	<input type="checkbox"/>
Ticket create notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ticket follow-up notification (locked)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ticket follow-up notification (unlocked)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ticket lock timeout notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ticket new note notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ticket queue update notification	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Please note that you can't completely disable notifications marked as mandatory

Update

Working with Tickets

A ticket describes an incoming operation/article including the resulting work steps.

To edit a ticket, click on the desired ticket in the dashboard, in the queue view or in the list of a ticket search to open it. By clicking on it, all associated articles are listed and the ticket function bar is displayed. The commands behind it refer to the entire ticket and not only to single articles.

Ticket Function Bar and the Tabs displayed below it

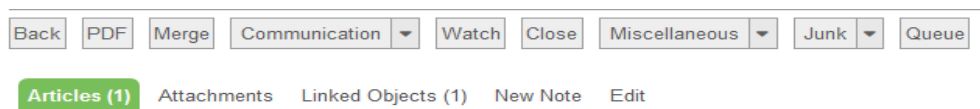


Figure 5: Ticket Toolbar & the Tabs for the Ticket

Ticket function bar

- **Back:** the previous view is displayed, this can be for example the view according to queues, the user interface or a search inquiry.
- **PDF:** here you can select which articles should either be saved or displayed via a PDF reader.
- **Merge:** here tickets are either combined as one ticket using UniBN-Ticket# (Merge) or all tickets from the same customer are combined as one ticket using the customer number ID (Combine customer ticket).

This function is useful if a ticket has been opened again for the same transaction because the customer did not use the reply function.

If the command “*Merge Customer Ticket*” is selected, the suggested selection of the already selected tickets appears, which are either new or open and in own processing.

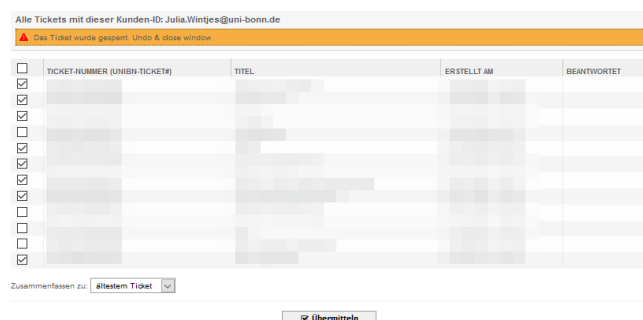



Figure 6: Merge Customer Ticket

Caution: Once tickets have been combined, they can no longer be separated!

- **Communication:** here telephone calls (telephone call contact: e-mail address of the customer) can be logged or e-mails can be sent which do not list all already existing articles.
- **Observe/Do not observe:** a ticket can be marked for observation to get information about changes. You can still view the ticket content of an observed ticket if it has been moved in a queue that you do not have access to.

In the top right corner of the menu bar, the following icon appears  when tickets are selected for observation. The number displayed below it indicates how many tickets the agent observes in total.

To stop observing the ticket, click on *Do not observe*.

- **Close:** the close function is used to complete the operation, with a choice between successful and unsuccessful. The ticket is no longer displayed in the queue view. However, as soon as a customer sends a request that contains the ticket number in the subject, the ticket is automatically reopened and is therefore available in the queue view again.

To reopen closed tickets, the search function is required. If a note is added and the status “Open” is selected, the ticket that has been closed until then will be listed again in the overview of open tickets.

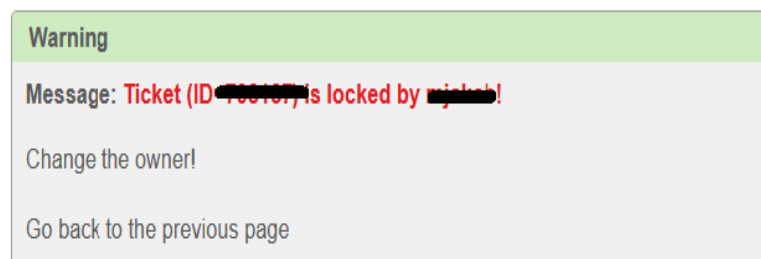
- **Miscellaneous:**

- **Lock (possible Unlock):** To prevent another agent from processing the ticket at the same time, a ticket can be locked for processing. The person who locks the ticket becomes the **Agent**.

When a ticket is answered, it is automatically locked. As soon as the ticket is locked, the command **Lock** is changed to **Unlock**.

The others can still see the ticket, but have limited ticket functions.

For example, the **Queue** command will display a message:

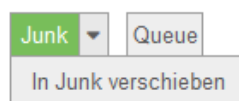


- **History:** All ticket changes are listed in the history, regardless of whether they were ordered by an agent or automatically executed by the system.
- **Free Fields:** Meta fields for tickets can be edited here. These fields are displayed in the ticket information if values are stored. In addition, the fields can be searched for.

Predefined are *Matriculation Number*, *Uni-ID* and *Keywords*. The metadata field *Keywords* is intended for ticket topics (separated by semicolons). You can use it to find out, for example, how many tickets on a certain topic have been processed in a certain period of time or to search for tickets on a specific topic in order to contact the inquirer. The other four free text fields can be used by an institution as desired.

- **Link:** For tickets with related content there is the possibility to link them among each other. This function is not suitable for merging tickets into a single process (for example, in the case of duplicate tickets for the same process, if a new ticket was created by mistake because the ticket number in the subject of the customer's e-mail reply was not transmitted). For this purpose, the **merge function** must be used.
- **Junk:** All junk emails can be moved to the Administrative::Junk queue. Please move only unique junk emails there. Please do not move serious request into the Junk Queue.

To prevent this from happening accidentally, there is a command "Move to Junk" below the Junk button.



- **Queue:** This allows the ticket to be assigned to another queue. A big advantage of the ticket system is the possibility to work together with different departments within the university in a coordinated way. Occasionally it happens that several departments and institutions of a university are affected by a process and can only process it together. Also, not all request from customers are addressed to the right place. Instead of sending the customer to other departments, the ticket system offers the possibility to assign tickets to other queues. By selecting a different queue in the pull-down menu, the ticket is moved there. Sometimes the rights to the ticket are lost during this process.

If a ticket is in the wrong queue, but it is not clear which queue it should be assigned to, or if there are no move permissions for the queue, this ticket should be moved to the queue *Administrative::Clearing*. If possible, a note with the complete information should be attached to the ticket and a short explanation why it is moved into this queue.

Tickets-Tabs: The number n in brackets indicates the number of

- **Articles(n):** lists all articles related to the open ticket.
- **Attachments(n):** lists the attachments.
- **Linked Objects(n):** lists the objects linked via the **Miscellaneous/Link** menu.
- **New Note:** agents can leave notes to record intermediate results and inform other agents about them. A distinction is made between internal and external notes. Internal notes are only visible to the agents who can access the ticket. In the case of external notes, the customer is also informed.



Figure 7: Internal (upper) and External (lower) Notes


In the case of internal notes, agents can respond to them directly. This makes internal inquiries clearer and information can be traced more easily.

- **Edit:** With the help of the tab “*Edit*” the following ticket assignments can be changed for the selected ticket:
 - Queue (corresponds to the ticket command *Queue*)
 - New Owner
 - New Responsible
 - Next State
 - Priority
 - Optionally write a note about it

To do this, you only need to select the required queue, the agent, or the status in the corresponding field.

Important: all fields marked with * are mandatory fields and must therefore be filled in.

The article will not be deleted from the original ticket, but simply moved to a newly created ticket is copied. The two tickets are automatically linked together at the same time. The customer should be informed about the splitting of a ticket (and the resulting new ticket number), because the assignment to the correct ticket is done via the ticket number.

- **Redirect:** In contrast to Forward, the original e-mail sender is retained with Redirect, so that when replying, the original e-mail sender is also replied to directly. The Redirect function is primarily intended for misdirected e-mails whose recipient department does not use the ticket system of the University of Bonn. In the case of incorrectly addressed e-mails that are intended for a department that also uses the ticket system, the ticket command *Queue* should be used to move them to the correct queue.
- **Forward:** As in an e-mail program, e-mails can be forwarded to any address (for example, for information). However, this function is not suitable for misdirected e-mails, here the **Redirect function** should be used.
- **Reply/Reply All:** The most frequently used function is the Answer function. Each queue is assigned at least one answer template, which can be selected via the pull-down menu. The template *Standard Answer* is an empty answer template. After selecting the template, the window for writing the e-mails is opened. Here the usual symbols for formatting the text are available. A spell check  can also be performed independently of the browser via the ticket system.

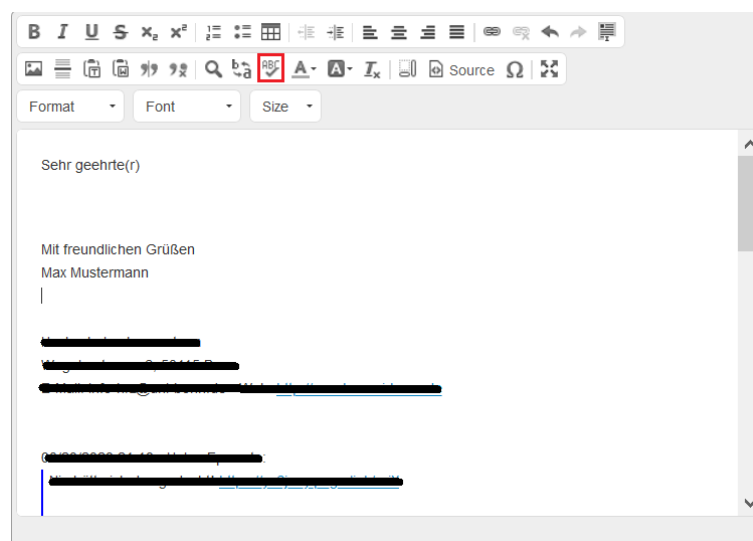


Figure 10: Writing a Response

Below the text input, it is possible to attach a file and change the status of the ticket.



Attachment: Keine Datei ausgewählt.


Next ticket state: x


Article type:

Figure 11: Appendix and Status Change

If the ticket was written to several e-mail addresses, the reply can be sent to all of them via the corresponding button.

- Mark as:** Here, a distinction is made between “ToDo” and “Important”. As soon as such a marking is set, the symbol  for “ToDo” or the symbol  for “Important” appears in the menu bar. This information is also displayed in the ticket:

MarkedAs:  Important - Subject: ...

MarkedAs:  ToDo - Subject: Tes...

Status of the Ticket

A ticket can have different statuses, which can help to determine what to do with the ticket.

On the right side of the dashboard all important information is displayed in a separate widget in the sidebar.

As soon as a new ticket is created, it is assigned the status New (without special filter rules). Replies will automatically lock the ticket and set the status to open.

Ticket Information	Ticket Information
CustomerID: [redacted]	CustomerID: [redacted]@uni-bonn.de
Lock State: lock	Lock State: unlock
Queue: Administrativ ::Dokumentation	Queue: Administrativ ::Dokumentation
Owner: [redacted] Q	Owner: [redacted] Q
Responsible: Admin OTRS Q	Responsible: Admin OTRS Q
State: new	State: open

Figure 12: Ticket Information

After processing (for example, a reply), the agent can give the ticket a different status. If the customer needs to respond again, a “wait for Reminder” status is useful, indicating that no processing is currently necessary.

As soon as a ticket is finally settled from the agent’s point of view, a closed status (successful or unsuccessful) should be selected. In this case the ticket disappears from the queue view and is automatically reopened when the customer asks for it.

The change of the status can be changed via the ticket characteristics or by replying to a ticket.

The following ticket statuses exist:

New	Status of new tickets created by e-mail. As soon as the ticket is processed, this status disappears. Attaching a note is not enough.
Open	The default status for unfinished tickets that still require processing.
Waiting to be reminded*	Wait status for tickets whose processing is temporarily suspended. After the waiting period has expired, the ticket agent receives an email regarding the ticket. As long as the ticket is not locked, all agents within the queue receive a reminder notification. Reminder notifications are only sent within the defined working hours and are repeated every 24 hours until the agent changes the status of the ticket manually.
Waiting for successful closure*	Wait status for tickets that are likely to be completed but will be monitored for some time. After the time limit has expired, the ticket is automatically set to successfully closed.
For your information	A variation of the wait for successful close status. Tickets in this status are closed successfully after the waiting time has expired and are still displayed in the queue until then. The status is particularly suitable if you want to ensure that all support employees take note of this ticket.
Waiting for unsuccessful closure*	Waiting status for tickets that are likely to be completed but will be monitored for some time. After the deadline has expired, the ticket is automatically set to unsuccessfully closed.
Successfully closed	End state for tickets that have been successfully resolved.
Closed unsuccessfully	Final status for tickets that could not be solved successfully.

*The time that this ticket spends in this waiting state is still included in the calculation of escalation times.

Create a Ticket

Normally a new ticket is created by the customer who writes to a designated e-mail address (see list).

For the agent there is also the possibility to create a new phone ticket (request by phone) or a new e-mail ticket (customer is contacted directly via the service address) under the menu item “*Tickets*” or via the toolbar.

With the telephone ticket, a ticket is created but no e-mail is sent. In both cases you stay in the creation window, only that a link to leave this window is displayed in the information bar at the top.

Ticket "2020062353002647" created! →

Through this way, a process that did not occur via e-mail can be made comprehensible for the colleagues.

Create new email ticket.

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

Workflow:

* From queue:

* To contact:

Cc:

Bcc:

CustomerID:

Owner: ↻

Responsible: ↻

Sign:

Crypt:

* Subject:

Text Template:

Setting a template will overwrite any text or attachment.

Options:

* Text:

B I U S x, x² |

Format - Font - Size -

Signature:

Figure 13: Creating a Ticket

The fields marked with an asterisk are mandatory fields. Many fields can only be selected when the previous one has been selected. For example, the agent or signature cannot be specified until the queue has been selected.

Create new email ticket.

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

Workflow:

* From queue:

* To contact:

Cc:

Bcc:

CustomerID:

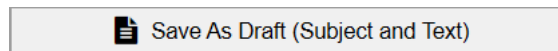
Owner: ↻

Responsible: ↻

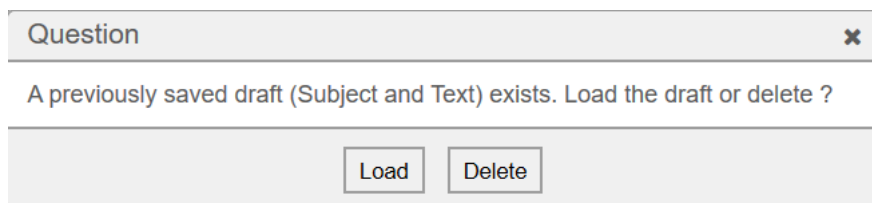
Saving Drafts

Often you are interrupted while working on a ticket and you do not want to finish your answer or note yet, but continue writing it at a later time.

For this purpose, there is, besides the “*Send Mail*” button, also the button



If you click on it, there is no indication that this has worked, but if you open the “Reply” or “Notes” window again in the same ticket, the message appears:



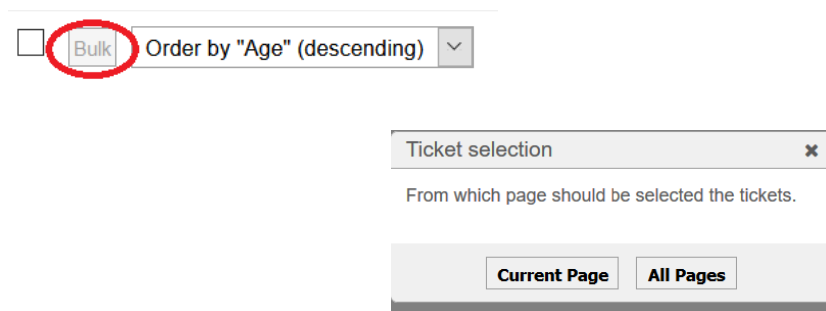
that a draft has been saved and must decide whether to load or delete it. The design will remain after logging out, but there is no overview of which designs exist.

Bulk Activities

Via the menu “*Tickets/View by...*” actions can be carried out for several tickets at the same time. If the selection is too large, a warning is displayed that the performance may suffer.

In this way it is possible to move several tickets to the junk folder, close the tickets or assign a different priority. For example, students who ask for the publication date of the exam results can also be answered in a kind of circular mail with one step.

To do this, simply select the desired tickets individually via the checkbox next to the ticket or directly all of them on the current page or on all pages to the left of the *Bulk*.



Once this is done, all selected tickets are locked and the following window opens:

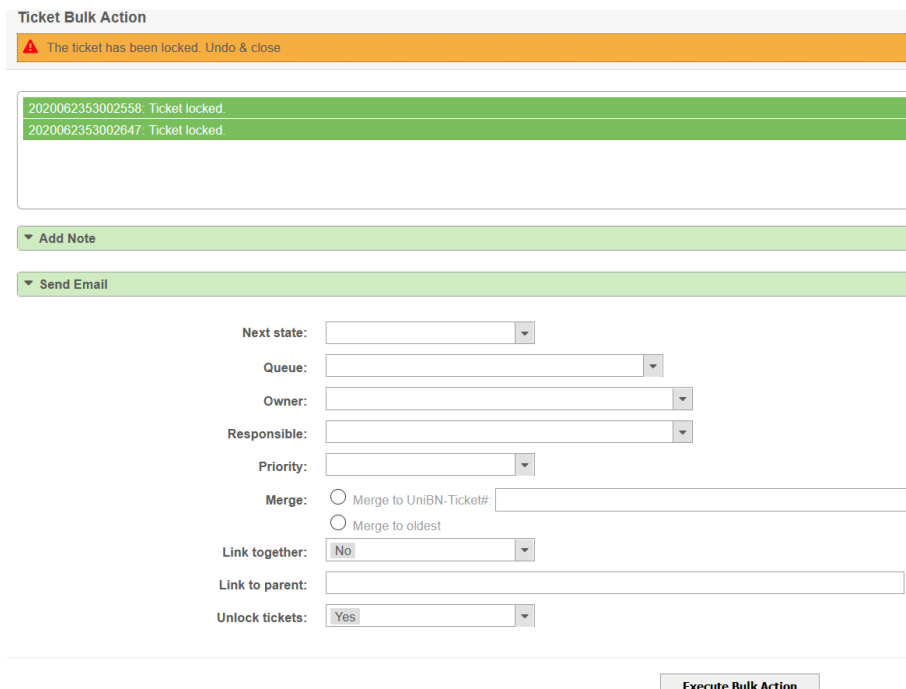
The image shows a 'Ticket Bulk Action' window. At the top, there is a warning message: 'The ticket has been locked. Undo & close'. Below this, there is a list of two tickets, both marked as 'Ticket locked'. Underneath the list are two sections: 'Add Note' and 'Send Email'. The 'Send Email' section contains several dropdown menus: 'Next state', 'Queue', 'Owner', 'Responsible', 'Priority', 'Merge' (with options 'Merge to UniBN-Ticket#' and 'Merge to oldest'), 'Link together' (set to 'No'), 'Link to parent', and 'Unlock tickets' (set to 'Yes'). At the bottom right of the window is an 'Execute Bulk Action' button.

Figure 14: Bulk Action


Now it is decided whether an e-mail, a note or a status change should be performed for all listed tickets.

Department Tickets

Tickets can be sent to e-mail addresses within the ticket system, which are also retrieved by the ticket system. Departments can thus communicate within the ticket system without having to move a ticket; each department then has its “own” ticket. In the subject of the ticket two ticket numbers are displayed so that a matching can be done in both queues.

This only makes sense if a joint collaboration on the ticket is required. If the ticket is to be transferred completely to the other queue, the ticket should rather be moved.

Search Ticket

The search function can be accessed at any time via the magnifying glass  in the menu bar. The search attributes can be combined individually. By using templates, even complicated, recurring search queries can be called up again at any time.

Using the search function, it is possible to access all tickets for which one has reading rights, even if they are already closed or are currently being processed by another agent.

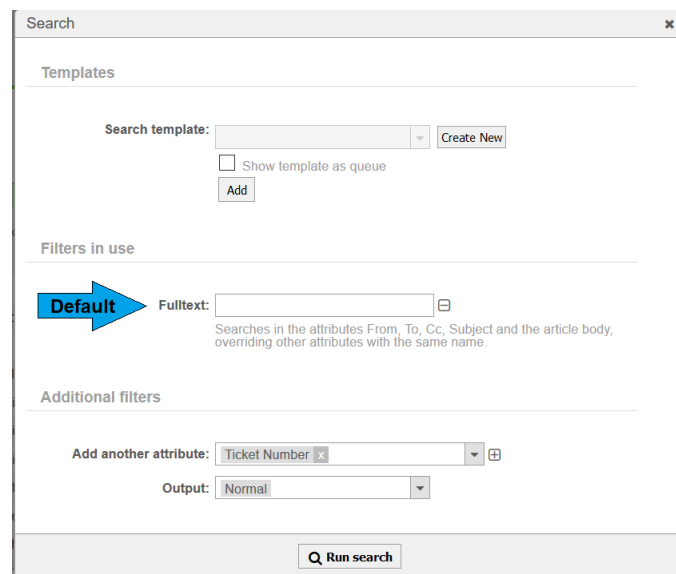




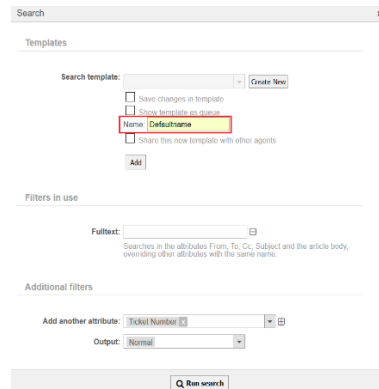
Figure 15: Search

- **Default:** Full text search is used by default. By clicking on the minus  , next to the field, the attribute can be removed. If no value is entered, the search function ignores the field.
- **Search templates:** Search templates allow you to store frequently recurring search queries so that they can be retrieved at any time. Existing templates can be selected using the drop-down menu.
- **Additional attribute:** To add an additional attribute, select it from the drop-down menu and add it by using the plus sign  .
- **Output:** The search can either be outputted in the normal queue view (Normal), in Excel format, in CSV format or as a print template.

Archived tickets (6 months after closing) are not searched via the default setting. To search among archived tickets as well, the attribute *Archive Search* must be added.

Create a Search Template

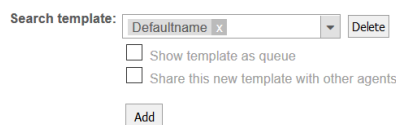
- Click on the magnifying glass to open the search dialog box.
- Click on the button “Create New” to the right of the search template.



The screenshot shows a search dialog box with a 'Search' title bar. Below the title bar, there is a 'Templates' section. Under 'Search template:', there is a dropdown menu showing 'Defaultname' and a 'Create New' button. Below this, there are three checkboxes: 'Save changes in template', 'Show template as queue', and 'Share this new template with other agents'. The 'Name' field is highlighted with a red box. Below the checkboxes is an 'Add' button. Further down, there is a 'Filters in use' section with a 'Fulltext:' field and a description: 'Searches in the attributes From, To, Cc, Subject and the article body, overriding other attributes with the same name.' Below that is an 'Additional filters' section with an 'Add another attribute:' dropdown showing 'Ticket Number' and an 'Output:' dropdown showing 'Normal'. At the bottom, there is a 'Run search' button.

- Enter the name of the new search template and click the “Add” button.
- Then the search can be adjusted, for example an additional filter attribute can be set.

If an existing search template is to be adapted, the checkbox *Save changes in template* must be checked when calling up the Search template.



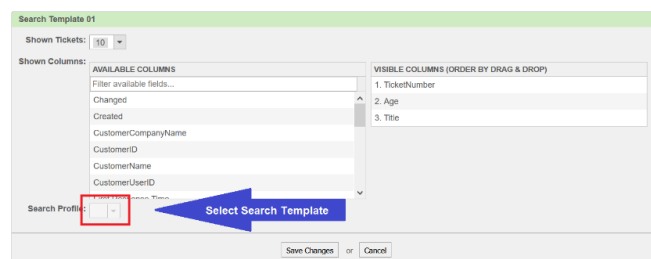
The screenshot shows a search template configuration dialog box. It has a 'Search template:' dropdown menu showing 'Defaultname' and a 'Delete' button. Below this, there are three checkboxes: 'Show template as queue', 'Share this new template with other agents', and 'Save changes in template'. The 'Add' button is at the bottom.

Otherwise, the change will be discarded during the next search process with the search template. If a search template is selected, a “Delete” button also appears to delete the template that is no longer needed.

Display Search Templates as a Virtual Queue

In the “Overview” menu, “*Search Template*” can be displayed via the settings by default, a search template is listed below the other queues.

If you stroke over the headline of the search template widget, the gear wheel becomes visible to assign an already existing search template:



The screenshot shows a 'Search Template 01' configuration dialog box. It has a 'Shown Tickets:' dropdown set to '10'. Below that, there are two columns: 'AVAILABLE COLUMNS' and 'VISIBLE COLUMNS (ORDER BY DRAG & DROP)'. The 'AVAILABLE COLUMNS' list includes 'Filter available fields...', 'Changed', 'Created', 'CustomerCompanyName', 'CustomerID', 'CustomerName', and 'CustomerUserID'. The 'VISIBLE COLUMNS' list includes '1. TicketNumber', '2. Age', and '3. Title'. At the bottom, there is a 'Search Profile:' dropdown menu with a gear icon, highlighted by a red box and a blue arrow labeled 'Select Search Template'. Below the dropdown are 'Save Changes' and 'Cancel' buttons.

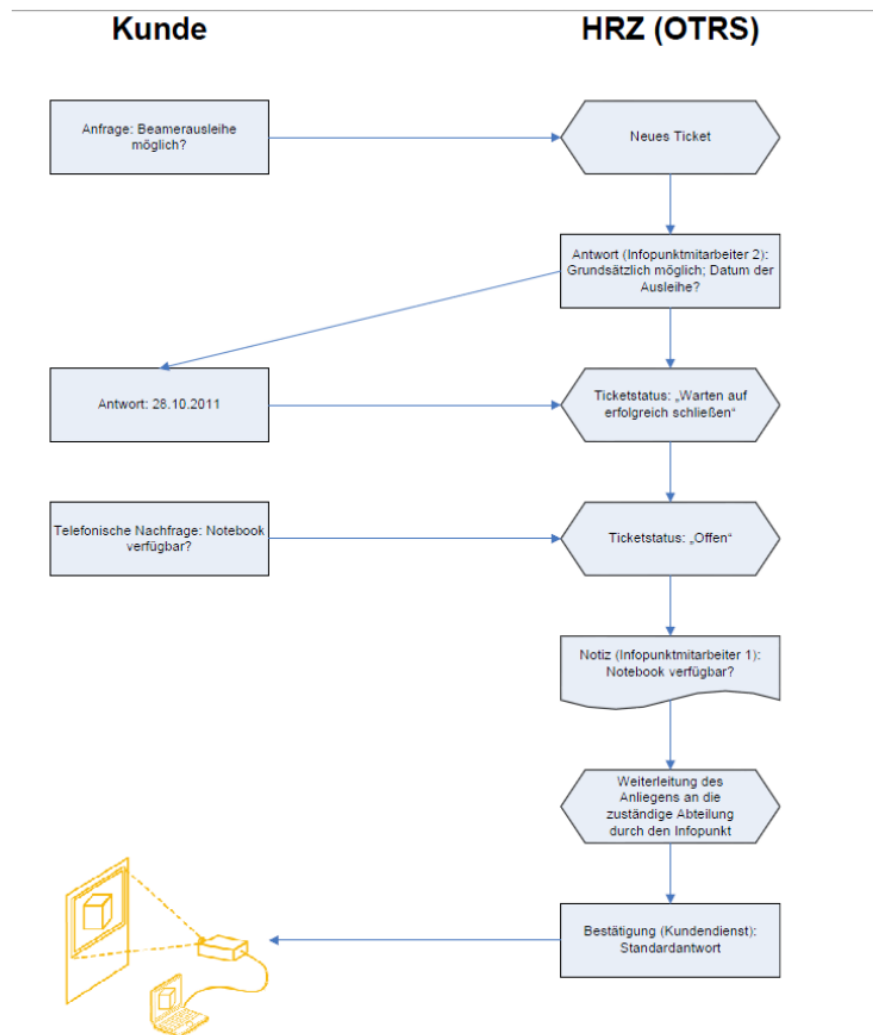
Figure 16: Search Template as a Virtual Queue

Example of a Support Case

In order to illustrate the work with the ticket system and the course of a ticket, the following support case is presented and considered.

A customer would like to borrow a beamer for a course at the University Computer Centre, but does not know whether the HRZ offers such a service. He submits the request to the general support address of the HRZ, which is retrieved by the ticket system. The ticket system creates a new ticket (status: new) which appears in the queue of the HRZ-IT-helpdesk.

The responsible student assistant provides the customer here with basic information and tries to clarify open questions (date of loan) before the request is forwarded to the responsible department. Since they are expecting an answer, they set the ticket status to "Waiting for successful closure". The customer answers the request and submits this



answer. In the ticket system, the response is automatically assigned to the original ticket based on the ticket number passed in the subject and the status is changed to open. Afterwards, the customer remembers that he also needs a notebook. In order to clarify directly whether notebooks are also lent, the customer calls the IT helpdesk directly this time. The IT helpdesk team provides information, adds a corresponding note to the ticket and moves the ticket to the queue of the responsible department. All

necessary information is now available here. The devices are prepared and the responsible agents can send the customer a confirmation. By using a response template, relevant information can be transmitted automatically without additional time expenditure for the processor and without the risk of forgetting important information.

Recommendations for working with the Ticket System

Ticket Processing

- Tickets should be processed regularly. Ideally, an initial response from an agent should be made within one working day.
- If the processing of an enquiry is delayed (e.g. because extensive information has to be obtained in advance), it is best to inform the enquirer of this in a short e-mail. If you can estimate it, also tell them how long the answer will be delayed and, if necessary, ask whether the answer is still desired after this time. If the response to request is delayed due to a temporary, particularly large volume of requests, you can inform several enquirers at once with a collective action.
- If you are absent, please make sure that you unlock locked requests in your queue and a substitution is arranged.
- Lock tickets as soon as you start processing them. Other agents will no longer see the ticket and you will be notified that it is already being processed. If you interrupt the processing for a longer period of time, add a note with your gained knowledge to the ticket and release it again.

Forwarding Tickets

- If you cannot answer a ticket, but it is in the correct queue, you can forward it to a responsible colleague via an owner assignment.
- If a ticket is incorrectly sorted in your queue, move it to the queue of the correct institute/department. If you do not know the correct queue or do not have the required moving permissions, move the ticket to the queue Administrative::Clearing.
- If you forward (redirect) a request to an external processor for final processing, please be sure to inform the requesting person about this.
- Employees who receive requests from users via e-mail to their personal e-mail address will redirect (not forward!) them to the e-mail address retrieved by the ticket system for your institution. This create a new ticket and the original sender remains the sender.

General Recommendations for Communication in Tickets

- Please consider data protection and do not pass on any personal data.
- If possible, address the user by name. change the form of address if necessary.

Example:

Dear Max Mustermann → Dear Mr Mustermann

Good afternoon may.mustermann@uni-bonn.de → Good afternoon Mr Mustermann

- Consider the needs of the inquirer in terms of content and language, as far as these are identifiable through the inquiry. Show the user that he/she/they is receiving specific personal information.
- If you can only provide sources for a factual question, give reasons why this is the case. Do not give answers that involve legal or medical advice. In case of doubt, make it clear that you are only passing on material you have found. If necessary, ask the user to contact a professional in the field they seek advice for. Suggest one if possible.
- Find out the meaning of the question. What else can the question mean? Please pay attention to possible nuances! If you are unclear, ask the user a question or put together a package of possible answers.
- The user should be helped as much as possible. Therefore, please give a clear answer or a possible way to an answer. If the research/solution would be too time-consuming give a reference to sources that contain the answer or to search strategies that could lead to the answer. Or name other organisations or experts that could possibly provide help.
- Avoid technical terms. You cannot be sure that users are familiar with technical terms. Therefore: always explain foreign words and technical/special terms.
- Give an objective answer. There may be several answers to a given question. Always list different possible answers impartially.
- Always answer politely and friendly. Remain objective, even if the inquirer writes in an unfriendly manner.
- Avoid being funny or ironic in your answer. You do not know the user and cannot assess their reaction to your answer.
- Include a friendly closing sentence, for example: "If you have any further questions, please do not hesitate to contact me."
- Proofread your answer. Check whether any links in the e-mail work.

- Do not send the user file attachments that are not absolutely necessary. This way you avoid that your reply mail might remain unread because the recipient fears a virus attack. If attachments cannot be bypassed (e.g. a scanned page), make sure to point this out in the text and state the file name in the text.
- If the e-mail comes back if the address is incorrect, try to find out the correct address. You can also enter the user's name in Google and see if an e-mail address is visible in the hits. Check the address for obvious errors. Often a simple dot turns into a hyphen or a vowel is not resolved.

What do I do if...

What do I do if...	Ticket promotion	Details/Remarks
...I know the answer and the question is solved with the answer?	<ol style="list-style-type: none"> 1. Choose the appropriate answer template 2. Enter/edit answer 3. Set next status <i>Successfully Closed</i> 	If there are still uncertainties from the point of view of the inquirer, the ticket will automatically be reopened when a new inquiry is made.
...the request is not within my purview, but is within the purview of my department?	<ol style="list-style-type: none"> 1. Select ticket tab <i>Edit</i> 2. Choose the right editor 3. If necessary, enter additional information for the new agent 	The new editor receives an e-mail with information about the assignment and the entered information, such as a link that takes them directly to the ticket.
...the request is not within the competence of my institution/department?	<ol style="list-style-type: none"> 1. If necessary, add a note with additional information 2. Move the request into the correct queue using the corresponding ticket function 3. If you do not know the correct queue or do not have moving permissions for it: move the ticket into the queue <i>Administrative::Clearing</i> 4. If the setup does not work with the ticket system: redirect the e-mail to the correct one and notify the original sender 	<p>Please note that by moving tickets you may lose access to them. Notes should always be added before moving.</p> <p>For No. 4: Please make sure that you only redirect to e-mail accounts that are not retrieved by the ticket system.</p>
...I need further information from the customer?	<ol style="list-style-type: none"> 1. Choose answer template 2. Enter/Edit question 3. If necessary, select <i>Wait</i> as the next status as a reminder 	
...I have forgotten to close a ticket to a completed process with the last answer?	<ol style="list-style-type: none"> 1. Select <i>Close</i> in the ticket function bar 2. If necessary, enter final information 	

<p>...I need additional information from another institution/department that also works with the ticket system?</p>	<ol style="list-style-type: none"> 1. If necessary, transfer responsibility for the ticket to me 2. Attach a note with required information 3. Move the ticket to the appropriate institution/department 	<p>By transferring the responsibility for the ticket, you signal that you are finally processing the ticket and at the same time you get access to the ticket, even if it is in a queue to which you usually do not have access. After you have received the desired information, the ticket should be moved back into the original queue.</p>
<p>...I can only partially solve the request and the further processing is the responsibility of another institution/department?</p>	<ol style="list-style-type: none"> 1. Internal note 2. Move 	
<p>...I take the ticket for processing?</p>	<ol style="list-style-type: none"> 1. Block the ticket 2. Note (if necessary) 	<p>Locking the ticket signals to the other agents that you are currently working on the ticket and you automatically become the agent of the ticket.</p>
<p>...further information about the procedure can be given to me by telephone?</p>	<ol style="list-style-type: none"> 1. Dial outgoing/incoming call in the ticket functions 2. Enter information 	
<p>...I can only solve the request with external support (contractors, suppliers)?</p>	<ol style="list-style-type: none"> 1. Select outgoing e-mail in the ticket functions 2. Make a request 	<p>If you also want to inform externals about the mail progress, you can also use the forward function in an e-mail article instead of an outgoing e-mail.</p>
<p>...there is already a ticket for an identical request/request from the same customer user?</p>	<ol style="list-style-type: none"> 1. Find the ticket number of the original ticket and copy it to the clipboard 2. Select <i>Merge</i> in the ticket functions 	