

DOCUMENTATION



*(Setting up an email Helpdesk
Workflow)*

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1.

Introduction to osTicket

osTicket is a widely used and trusted open source support ticketing system which seamlessly routes inquiries created via email, web-forms and API.

- The software features a built-in customer portal that allows users to submit tickets and track the status of their requests.
- With the help of "auto assign," incoming tickets are then automatically routed to the most suitable departments and staff members based on the requests.
- Once a ticket is sent, the software also sends an automated email response to the users to keep them updated on the status of their requests.
- With interactive dashboards and reporting modules to prepare customized reports, the IT department can gain complete visibility into help desk operations and make effective decisions regarding staffing levels and ticket handling procedures.
- The system can only be deployed in the cloud and is suited for small and midsize enterprise customers.

2.

Installing & Setting up of osTicket

Download link for osTicket :

<https://osticket.com/download/>

- Go to Downloads > Open source (download) > osTicket Core, v1.16.3 (Github Link)

OR

Github link for osTicket :

<https://github.com/osTicket/osTicket/releases>

- Download the zip file : **osTicket-v1.16.3.zip**
- Upload the file on your web server and follow the steps in the link given below -

<https://docs.osticket.com/en/latest/Getting%20Started/Installation.html>

Some Important terms for email configuration :

- **IMAP (Internet Message Access Protocol)**

IMAP is an e-mail protocol that deals with managing and retrieving e-mail messages. IMAP keeps an email on a server, and then synchronizes it across several devices. IMAP is used in receiving emails, not sending them.

- **SMTP (Simple Mail Transfer Protocol)**

SMTP is an email protocol used for sending email messages from one email account to another via the internet.

- **POP (Post Office Protocol)**

POP is used to receive incoming messages. POP3 will receive emails and hold them for clients until they pick them up. All emails are downloaded and stored locally. It works by contacting your email service and downloading all of your new messages from it.

3.

Introduction to Email helpdesk workflow

- A help desk workflow includes all the steps that must be undertaken by your agents to successfully achieve a task.
- HelpDesk is a ticketing system. It's a tool to manage your email communication with customers. It works like a mailbox but has additional features designed to make customer support easier.
- An email workflow is series of automated emails that will be sent or not based on a person's behavior or contact information.

With workflows, you can trigger actions based on any information you have about your leads, allowing you to send the right message to the right person at the right time.

An email ticketing system or an email help desk software automatically converts incoming emails into tickets that are easy to track, monitor, and manage.

Now that ticket can be accessed by any member of the team on the dashboard whosoever is available at that time. The one who access will get the complete details of the sender. So this osTicket is a system which helps in handling the emails handling in the form of tickets.

4.

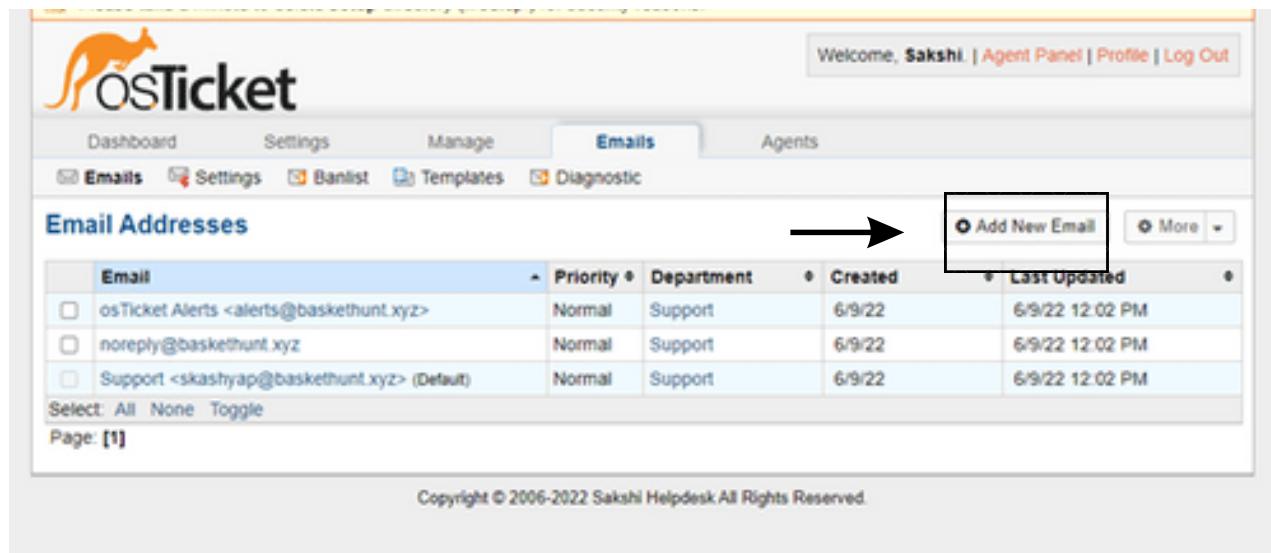
Setting up an Email helpdesk workflow using osTicket

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.

The support desk can handle an unlimited number of email addresses. You can arrange an email's **IMAP or POP settings** so that the system can **retrieve** and **create tickets from the mailbox**. You can also configure an email's **SMTP settings** so that the system can **send messages** from that address. Additional parameters can be changed to alter the behaviour of New Tickets fetched from the address.

Let's begin with the set up -

- Helpdesk > Admin Panel > Emails



Welcome, Sakshi | Agent Panel | Profile | Log Out

osTicket

Dashboard Settings Manage Emails Agents

Email Addresses

Email	Priority	Department	Created	Last Updated
osTicket Alerts <alerts@baskethunt.xyz>	Normal	Support	6/9/22	6/9/22 12:02 PM
noreply@baskethunt.xyz	Normal	Support	6/9/22	6/9/22 12:02 PM
Support <skashyap@baskethunt.xyz> (Default)	Normal	Support	6/9/22	6/9/22 12:02 PM

Select: All None Toggle
Page: [1]

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Click on **Add New Email** button. The new window appears.

4.1 Email Configuration using Outlook

Fill the outlook email address which would be displayed at the customer or receiver's end, email name to be displayed showing from where the email has been sent and login email information.

The screenshot shows the OSTicket interface with the 'Emails' tab selected. The page title is 'Update Email Address' and the email address is listed as 'sakshi_osticket@outlook.com'. The form contains three main sections: 'Email Information and Settings' (Email Address: sakshi_osticket@outlook.com, Email Name: Support Sakshi Helpdesk), 'New Ticket Settings' (Department: Support, Priority: System Default, Help Topic: System Default, Auto-Response: Disable for this email checked), and 'Email Login Information' (Username: sakshi_osticket@outlook.com, Password: masked). A note at the bottom says 'To change password enter new password above.'

Now enable the IMAP and SMTP settings and fill the correct details (outlook config) like hostname, port number, etc.

The screenshot shows two stacked configuration forms. The top form is 'Fetching Email via IMAP or POP' with fields: Status (Enable selected), Hostname (outlook.office365.com), Mail Folder (INBOX), Port Number (993), Mail Box Protocol (IMAP + SSL), Fetch Frequency (1 minutes), Emails Per Fetch (30), and Fetched Emails (Move to folder: osTicket, Delete emails, Do nothing). The bottom form is 'Sending Email via SMTP' with fields: Status (Enable selected), Hostname (smtp.office365.com), Port Number (587), Authentication Required (Yes selected), Header Spoofing (Allow for this email), and Internal Notes (Be liberal, they're internal).

Click on **Save changes** button.



Save Changes

Reset

Cancel

Email Added Successfully

The screenshot shows the OSTicket web interface. At the top, there's a logo of an orange kangaroo and the word "osTicket". The top navigation bar includes links for Dashboard, Settings, Manage, **Emails**, Agents, and a user profile. Below the navigation, there are links for Emails, Settings, Banlist, Templates, and Diagnostic. A green success message box at the top says "Successfully added Support Sakshi Helpdesk." The main content area is titled "Email Addresses" and contains a table with columns: Email, Priority, Department, Created, and Last Updated. The table lists four entries:

Email	Priority	Department	Created	Last Updated
osTicket Alerts <alerts@baskethunt.xyz>	Normal	Support	6/9/22	6/9/22 12:02 PM
noreply@baskethunt.xyz	Normal	Support	6/9/22	6/9/22 12:02 PM
Support Sakshi Helpdesk <sakshi_osticket@outlook.com>	Normal	Support	6/13/22	6/13/22 7:53 PM
Support <skashyap@baskethunt.xyz> (Default)	Normal	Support	6/9/22	6/9/22 12:02 PM

Below the table are buttons for "Add New Email" and "More". A footer message says "Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved."

- **Settings > Enable Email Fetching > Enable 'Fetch on auto-cron' > Save Changes**

The screenshot shows the OSTicket Settings page. The top navigation bar includes links for Dashboard, Settings, Manage, **Emails**, Agents, and a user profile. Below the navigation, there are links for Emails, **Settings**, Banlist, Templates, and Diagnostic. A green success message box at the top says "Successfully updated." The main content area is titled "Email Settings and Options" and contains several configuration sections:

- Note that some of the global settings can be overridden at department/email level.**
- Default Template Set:** osTicket Default Template (HTML)
- Default System Email:** Support <skashyap@baskethunt.xyz>
- Default Alert Email:** osTicket Alerts <alerts@baskethunt.xyz>
- Admin's Email Address:** skashyap@baskethunt.in
- Verify Email Addresses:** Verify email address domain
- Incoming Emails:**
 - Email Fetching:** Enable Fetch on auto-cron
 - Strip Quoted Reply:** Enable
 - Reply Separator Tag:** -- reply above this line --
 - Emailed Tickets Priority:** Enable
 - Accept All Emails:** Accept email from unknown Users
 - Accept Email Collaborators:** Automatically add collaborators from email fields
- Outgoing Email:** Default email only applies to outgoing emails without SMTP setting.
- Default MTA:** Support Sakshi Helpdesk <sakshi_osticket@outlook.co>
- Attachments:** Email attachments to the user

At the bottom are "Save Changes" and "Reset Changes" buttons.

Now for testing the mail is going or not -

- Diagnostic > Frame the mail by filling necessary details > Send Message

The screenshot shows the osTicket Agent Panel interface. At the top, there's a navigation bar with links for Dashboard, Settings, Manage, Emails (which is highlighted in blue), Agents, and a user welcome message. Below the navigation is a sub-navigation bar with links for Emails, Settings, Banlist, Templates, and Diagnostic. A green success message box at the top states "Test email sent successfully to <sk19sakshikashyap@gmail.com>". The main content area is titled "Test Outgoing Email" and contains a form for testing outgoing email settings. The form fields are: From: Support Sakshi Helpdesk <sakshi_osticket@outlook.co>, To: sk19sakshikashyap@gmail.com, and Subject: osTicket test email. Below the form is a rich text editor toolbar and a message body containing "Hi.... This is a test mail.". At the bottom of the form are "Send Message", "Reset", and "Cancel" buttons. The footer of the page includes a copyright notice: "Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved."

The output can be seen on the email id where the mail has been sent as shown below.

The screenshot shows a Gmail inbox. On the left, there's a sidebar with labels: Compose, Inbox (3,562), Stared, Snoozed, Sent, Drafts, More, Meet, New meeting, Join a meeting, Hangouts, and Sakshi. The main area displays an email from "Support Sakshi Helpdesk" with the subject "osTicket test email". The email body contains the message "Hi... This is a test mail.". Below the message are three buttons: "Received your mail.", "Hi, I got it.", and "It works!". At the bottom of the email view are "Reply" and "Forward" buttons. The top of the screen shows the standard Gmail header with a search bar and other navigation icons.

Now sending reply to the mail sent through osticketing.

The screenshot shows an email inbox with two messages. The first message is from 'Support Sakshi Helpdesk' to 'me' at 9:01 PM (4 minutes ago), containing the text 'Hi... This is a test mail.'. The second message is from 'Sakshi Kashyap' to 'Support' at 9:06 PM (0 minutes ago), containing the text 'Received your mail.', 'Thanks', and '***'. Below the messages are 'Reply' and 'Forward' buttons.

The email will appear in the form of ticket at the dashboard of osTicket as shown.

- **osTicket window > Agent Panel > Tickets**

The screenshot shows the osTicket Agent Panel Tickets page. The 'Tickets' tab is selected. The 'Open' tab is active, showing a list of 13 open tickets. The first ticket, with ID 700375, is highlighted with a red box. A black arrow points to the 'Assigned To' column for this ticket, which is currently empty. The other columns show the ticket ID, last updated date, subject, from, priority, and assigned to user.

Ticket	Last Updated	Subject	From	Priority	Assigned To
908086	6/9/22 12:02 PM	osTicket Installed!	osTicket Support		
700375	6/16/22 9:08 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
178273	6/16/22 8:12 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
801049	6/16/22 3:43 PM	Undelivered Mail Returned to Sender	Mail Delivery System	Normal	
104821	6/16/22 3:43 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
702195	6/16/22 3:43 PM	Test mail reply	Sakshi Kashyap	Normal	
723161	6/16/22 3:43 PM	Undelivered Mail Returned to Sender	Mail Delivery System	Normal	
565200	6/16/22 3:43 PM	Testing	Sakshi Kashyap	Normal	
233888	6/16/22 3:43 PM	Welcome to your new Outlook.com ac...	Outlook Team	Normal	
594175	6/16/22 3:43 PM	Testing mail	Sakshi Kashyap	Normal	
170345	6/16/22 3:43 PM	Outlook ticket testing	Sakshi Kashyap	Normal	
564506	6/16/22 3:43 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
173173	6/16/22 3:43 PM	Re: osTicket test email	Sakshi Kashyap	Normal	

This is how the email will be converted into a ticket and displayed at the dashboard acquiring a unique ticket id.

The screenshot shows the osTicket Admin Panel interface. At the top, there's a navigation bar with links for Dashboard, Users, Tasks, Tickets (which is the active tab), and Knowledgebase. Below the navigation is a toolbar with icons for Open, My Tickets, Closed, Search, and New Ticket. The main content area displays a ticket detail page for Ticket #700375, which is a response to a test email. The ticket details include:

Status: Open	User: Sakshi Kashyap (9) (Manage Collaborators)
Priority: Normal	Email: sk19sakshikashyap@gmail.com
Department: Support	Source: Email
Create Date: 6/16/22 9:08 PM	

Below this, another set of fields shows:

Assigned To: — Unassigned —	Help Topic: None
SLA Plan: Default SLA	Last Message: 6/16/22 9:08 PM
Due Date: 6/21/22 8:00 AM	Last Response:

The ticket thread section shows a message from "Sakshi Kashyap posted 6/16/22 9:08 PM Re: osTicket test email". The message content is:

Received your mail.
Thanks
On Thu, Jun 16, 2022 at 9:01 PM Support Sakshi Helpdesk sakshi_osticket@outlook.com wrote:
Hi... This is a test mail.

Below the ticket detail, a "Post Reply" window is open. It contains the following fields:

From: Support <skashyap@baskethunt.xyz>
Recipients: "Sakshi Kashyap" <sk19sakshikashyap@gmail.com> ↳ Collaborators
Reply To: All Active Recipients
Response: Select a canned response

The rich text editor toolbar is visible above the reply area. A note says "Start writing your response here. Use canned responses from the drop-down above". There's also a file upload section with the placeholder "Drop files here or choose them".

At the bottom of the reply window, there are options for Signature (None or Department Signature (Support)), Ticket Status (Open (current)), and buttons for Post Reply and Reset.

4.2 Email Configuration using Cyber Panel

- Go to cyber panel (or any server) > Emails > Create Email > Select Website

CREATE EMAIL ACCOUNT

Select a website from the list, to create an email account.

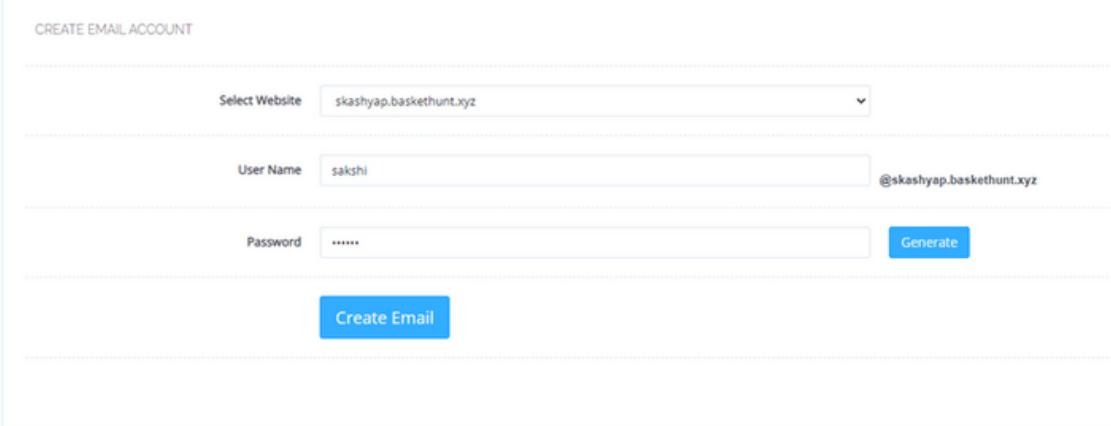
CREATE EMAIL ACCOUNT

Select Website: skashyap.baskethunt.xyz

User Name: sakshi @skashyap.baskethunt.xyz

Password: Generate

Create Email



The email account will be created. Now make sure to see the IMAP/SMTP configurations of the server used.

Here, in case of cyber panel, go to **List Emails** and select domain.

LIST EMAIL ACCOUNTS - DEBUG EMAIL ISSUES

List Email Accounts. Change their passwords or delete them.

CREATE EMAIL

List Email Accounts

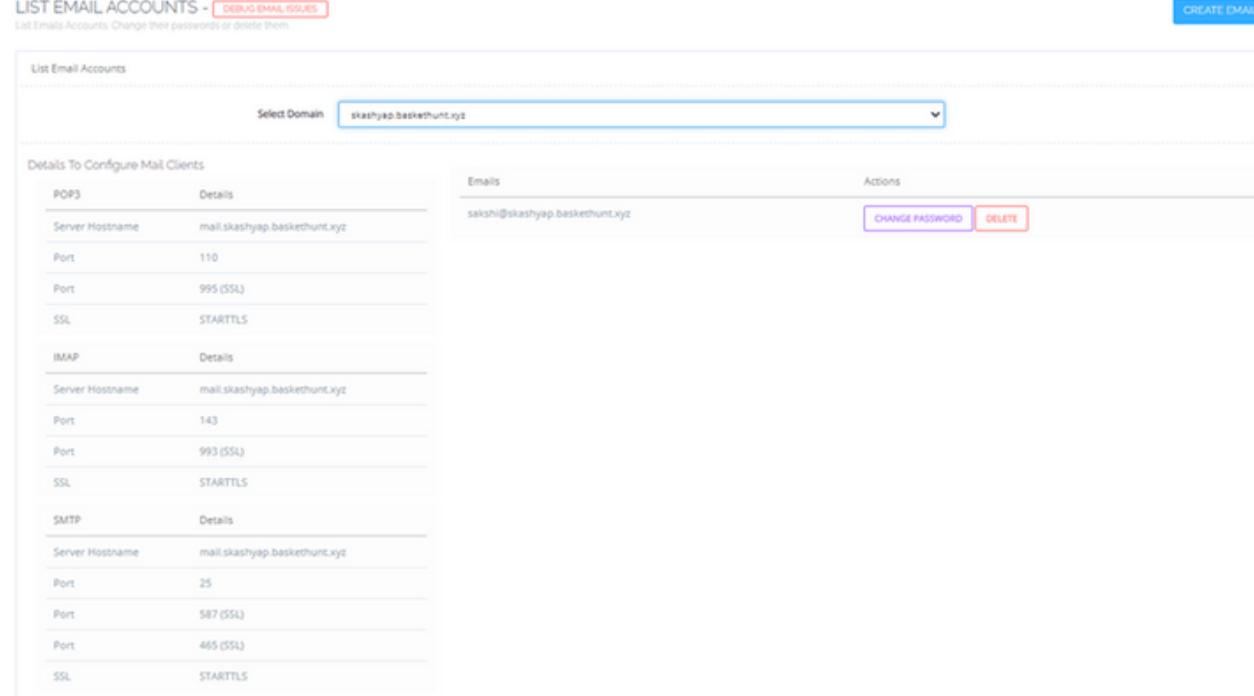
Select Domain: skashyap.baskethunt.xyz

Details To Configure Mail Clients

Protocol	Details
POP3	Server Hostname: mail.skashyap.baskethunt.xyz Port: 110 Port: 995 (SSL) SSL: STARTTLS
IMAP	Server Hostname: mail.skashyap.baskethunt.xyz Port: 143 Port: 993 (SSL) SSL: STARTTLS
SMTP	Server Hostname: mail.skashyap.baskethunt.xyz Port: 25 Port: 587 (SSL) Port: 465 (SSL) SSL: STARTTLS

Emails

	Actions
sakshi@skashyap.baskethunt.xyz	CHANGE PASSWORD DELETE



The same steps will be repeated as in case of email configuration using Outlook for osTicket platform.

Adding new Email account.

The screenshot shows the OSTicket interface with the 'Emails' tab selected. The page title is 'Update Email Address — sakshi@skashyap.baskethunt.xyz'. The form contains sections for 'Email Information and Settings' (Email Address: sakshi@skashyap.baskethunt.xyz, Email Name: Sakshi), 'New Ticket Settings' (Department: System Default, Priority: System Default, Help Topic: System Default, Auto-Response: Disable for this email checked), 'Email Login Information' (Username: sakshi@skashyap.baskethunt.xyz, Password: empty field with note 'To change password enter new password above.'), and a note at the bottom: 'Enable the IMAP/ SMTP and fill the relevant details like hostname and port number according to the server you are using (here cyber panel is used)'.

Enable the IMAP/ SMTP and fill the relevant details like hostname and port number according to the server you are using (here cyber panel is used).

The screenshot shows the CyberPanel interface under 'Email Configuration'. It includes sections for 'Fetching Email via IMAP or POP' (Status: Enable, Hostname: mail.skashyap.baskethunt.xyz, Mail Folder: INBOX, Port Number: 993, Mail Box Protocol: IMAP + SSL, Fetch Frequency: 1 minutes, Emails Per Fetch: 10, Fetched Emails: Do nothing (not recommended)), and 'Sending Email via SMTP' (Status: Enable, Hostname: mail.skashyap.baskethunt.xyz, Port Number: 587, Authentication Required: Yes, Header Spoofing: Allow for this email). A note at the bottom says: 'Internal Notes: Be liberal, they're internal'.

Click on **Save changes** button.



Save Changes

Reset

Cancel

Email Added Successfully

The screenshot shows the OSTicket interface with the 'Emails' tab selected. The title bar says 'Welcome, Sakshi.' with links for Agent Panel, Profile, and Log Out. Below the title bar is a navigation menu with links for Dashboard, Settings, Manage, Emails (selected), Agents, and sub-links for Emails, Settings, Banlist, Templates, and Diagnostic. The main content area is titled 'Email Addresses' and contains a table with columns: Email, Priority, Department, Created, and Last Updated. The table lists several entries:

Email	Priority	Department	Created	Last Updated
osTicket Alerts <alerts@baskethunt.xyz>	Normal	Support	6/9/22	6/9/22 12:02 PM
noreply@baskethunt.xyz	Normal	Support	6/9/22	6/9/22 12:02 PM
Sakshi <sakshi@skashyap.baskethunt.xyz>	Normal	Support	6/15/22	6/15/22 1:08 PM
Support Sakshi Helpdesk <sakshi_osticket@outlook.com>	Normal	Support	6/13/22	6/13/22 7:53 PM
Support <skashyap@baskethunt.xyz> (Default)	Normal	Support	6/9/22	6/9/22 12:02 PM

Below the table are buttons for 'Add New Email' and 'More'. A message at the bottom says 'Select: All None Toggle' and 'Page: [1]'. The footer copyright notice reads 'Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved.'

- **Settings > Enable Email Fetching > Enable 'Fetch on auto-cron' > Save Changes**

The screenshot shows the OSTicket interface with the 'Settings' tab selected. The title bar says 'Welcome, Sakshi.' with links for Agent Panel, Profile, and Log Out. Below the title bar is a navigation menu with links for Dashboard, Settings (selected), Manage, Emails, and Agents, and sub-links for Emails, Settings, Banlist, Templates, and Diagnostic. A green success message bar says 'Successfully updated.' The main content area is titled 'Email Settings and Options' and contains several configuration sections:

- Note that some of the global settings can be overridden at department/email level.**
- Default Template Set:** osTicket Default Template (HTML)
- Default System Email:** Support <skashyap@baskethunt.xyz>
- Default Alert Email:** osTicket Alerts <alerts@baskethunt.xyz>
- Admin's Email Address:** skashyap@baskethunt.in
- Verify Email Addresses:** Verify email address domain
- Incoming Emails:**
 - Email Fetching:** Enable Fetch on auto-cron
 - Strip Quoted Reply:** Enable
 - Reply Separator Tag:** -- reply above this line --
 - Emailed Tickets Priority:** Enable
 - Accept All Emails:** Accept email from unknown Users
 - Accept Email Collaborators:** Automatically add collaborators from email fields
- Outgoing Email:** Default email only applies to outgoing emails without SMTP setting.
- Default MTA:** Support Sakshi Helpdesk <sakshi_osticket@outlook.co
- Attachments:** Email attachments to the user

At the bottom are 'Save Changes' and 'Reset Changes' buttons.

Now for testing the mail is going or not -

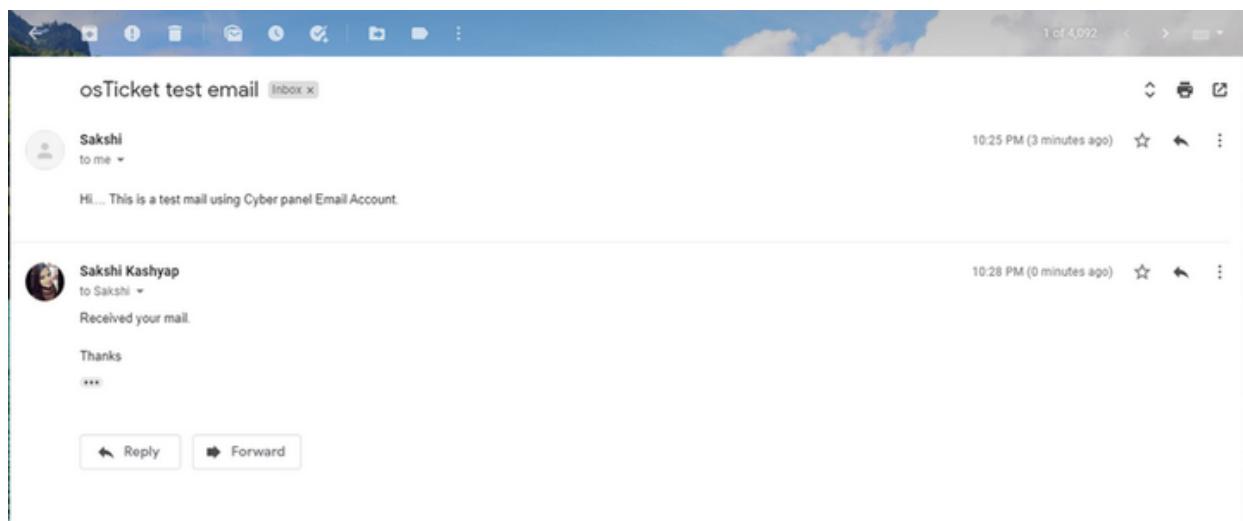
- Diagnostic > Frame the mail by filling necessary details > Send Message

The screenshot shows the osTicket interface with the 'Emails' tab selected. A green success message at the top states: "Test email sent successfully to <sk19sakshikashyap@gmail.com>". Below this, the 'Test Outgoing Email' section is visible, containing fields for 'From', 'To', and 'Subject', all filled with test values. The 'Message' area contains the text: "Hi.... This is a test mail using Cyber panel Email Account.". At the bottom, there are 'Send Message', 'Reset', and 'Cancel' buttons.

The output can be seen on the email id where the mail has been sent as shown below.

The screenshot shows a Gmail inbox with a single email from 'osTicket test email'. The subject is 'osTicket test email'. The recipient is 'Sakshi' (to me). The email body contains the text: "Hi.... This is a test mail using Cyber panel Email Account.". Below the message, there are three buttons: 'Received your mail.', 'It works!', and 'HII I got it.' At the bottom of the email card are 'Reply' and 'Forward' buttons.

Now sending reply to the mail sent through osticketing.



The email will appear in the form of ticket at the dashboard of osTicket as shown.

- **osTicket window > Agent Panel > Tickets**

The screenshot shows the osTicket Tickets page. The top navigation bar includes links for Dashboard, Users, Tasks, Tickets (which is the active tab), Knowledgebase, and a welcome message for 'Sakshi'. Below the navigation is a search bar with an 'advanced' link and a 'Sort' dropdown. The main area displays a table of open tickets with columns: Ticket, Last Updated, Subject, From, Priority, and Assigned To. A black arrow points to the 'Assigned To' column for the second ticket in the list, which is 'Sakshi Kashyap'. The table lists 14 tickets in total, with ticket numbers ranging from 908086 to 173173. At the bottom, there are buttons for 'Select: All None Toggle', 'Page: [1] Export', and a note indicating 'Showing 1 - 14 of about 14'.

Ticket	Last Updated	Subject	From	Priority	Assigned To
908086	6/9/22 12:02 PM	osTicket Installed!	osTicket Support		
721901	6/16/22 10:29 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
700375	6/16/22 9:08 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
178273	6/16/22 8:12 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
801049	6/16/22 3:43 PM	Undelivered Mail Returned to Sender	Mail Delivery System	Normal	
104821	6/16/22 3:43 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
702195	6/16/22 3:43 PM	Test mail reply	Sakshi Kashyap	Normal	
723161	6/16/22 3:43 PM	Undelivered Mail Returned to Sender	Mail Delivery System	Normal	
565200	6/16/22 3:43 PM	Testing	Sakshi Kashyap	Normal	
233888	6/16/22 3:43 PM	Welcome to your new Outlook.com ac...	Outlook Team	Normal	
594175	6/16/22 3:43 PM	Testing mail	Sakshi Kashyap	Normal	
170345	6/16/22 3:43 PM	Outlook ticket testing	Sakshi Kashyap	Normal	
564506	6/16/22 3:43 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
173173	6/16/22 3:43 PM	Re: osTicket test email	Sakshi Kashyap	Normal	

This is how the email will be converted into a ticket and displayed at the dashboard acquiring a unique ticket id.

The screenshot shows the osTicket Admin Panel interface. At the top, there's a navigation bar with links for Dashboard, Users, Tasks, Tickets (selected), and Knowledgebase. A welcome message for 'Sakshi' is displayed along with links for Admin Panel, Profile, and Log Out. Below the navigation is a toolbar with icons for Open, My Tickets, Closed, Search, and New Ticket.

The main area displays a ticket detail for 'Ticket #721901'. The ticket information includes:

- Status: Open
- Priority: Normal
- Department: Support
- Create Date: 6/16/22 10:29 PM
- Assigned To: — Unassigned —
- SLA Plan: Default SLA
- Due Date: 6/21/22 8:00 AM
- User: Sakshi Kashyap (10) (Manage Collaborators)
- Email: sk19sakshikashyap@gmail.com
- Source: Email
- Help Topic: None
- Last Message: 6/16/22 10:29 PM
- Last Response: (empty)

Below the ticket details, there are tabs for 'Ticket Thread (1)' and 'Tasks'. The ticket thread shows a message from 'Sakshi Kashyap' posted on 6/16/22 at 10:29 PM, responding to 'osTicket test email'. The message content is:

Received your mail.
Thanks
On Thu, Jun 16, 2022 at 10:25 PM Sakshi sakshi@skashyap.baskethunt.xyz wrote:
Hi.... This is a test mail using Cyber panel Email Account.

Below the message, it says 'Created by Sakshi Kashyap 6/16/22 10:29 PM'.

A large modal window titled 'Post Reply' is open. It contains fields for 'From' (Support <skashyap@baskethunt.xyz>), 'Recipients' (Sakshi Kashyap <sk19sakshikashyap@gmail.com>), 'Reply To' (All Active Recipients), and 'Response' (Select a canned response). There's a rich text editor toolbar above the response area. The response area itself is empty and has placeholder text: 'Start writing your response here. Use canned responses from the drop-down above'. Below the response area are file upload and signature options: 'Drop files here or choose them', 'Signature' (None selected), and 'Ticket Status' (Open (current)). At the bottom of the modal are 'Post Reply' and 'Reset' buttons.

5.

Adding 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.

- Admin Panel > Manage > Filters > Add new Filter

The screenshot shows the OSTicket Admin Panel with the 'Filters' tab selected under the 'Manage' menu. The main title is 'Add New Filter'. The form fields include:

- Filter Name:** Sakshi Kashyap
- Execution Order:** 1 (1...99) Stop processing further on match!
- Filter Status:** Active
- Target Channel:** Emails

Below the form, there are tabs for 'Filter Rules', 'Filter Actions', and 'Internal Notes'. The 'Filter Rules' tab is active, showing:

Filter Rules: Rules are applied based on the criteria. *

Rules Matching Criteria: Match All Match Any * (case-insensitive comparison)

Name	Equal	Sakshi Kashyap
Email	Equal	sk19sakshikashyap@gmail.com

Add Rule

At the bottom are 'Add Filter', 'Reset', and 'Cancel' buttons.

Add suitable filter name. Keep the execution order as small as possible. Enable the filter status as **Active** and select target channels out of **ANY, emails, web forms, API calls** etc. on which yo want to apply filters.

Filter Rules Section:

Maximum of 25 rules can be added for one filter. If you choose **Match All** option, then the filter will identify the ticket satisfying all the rules created for a given ticket filter. If **Match any** option is selected, then any of the given rules will be used to match the ticket filter.

Filter Actions Section :

- **Set Department:** Auto-Assign to a specific Department if filter rules are met.
- **Set Priority:** Assign priority to ticket when rules are met; this will override assigned department priority
- **Set Status:** This will determine the ticket status once created if the filter rules are met.
- **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 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.

The screenshot shows the OSTicket interface for managing filters. The top navigation bar includes links for Dashboard, Settings, Manage (selected), Emails, Agents, and various system modules like Help Topics, Filters, SLA, Schedules, API, Pages, Forms, Lists, and Plugins. A welcome message for 'Sakshi' is displayed along with links for Agent Panel, Profile, and Log Out. A green success message at the top indicates 'Successfully updated this ticket filter.' The main content area is titled 'Update Filter — Sakshi Kashyap'. It displays the filter's configuration details: Filter Name (Sakshi Kashyap), Execution Order (1), Active Status (Active), and Target Channel (Emails). Below this, the 'Filter Actions' tab is active, showing two actions: Set Department (Support) and Set Priority (High). There is a dropdown menu for adding more actions and buttons for Save Changes, Reset, and Cancel. At the bottom, a copyright notice reads 'Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved.'

After creating the filter, when we create a new ticket, the filters on applying will identify the ticket as shown below -

The screenshot shows the osTicket Tickets page. The 'Priority' column for ticket #240812 is highlighted in pink, indicating it has been assigned a priority. The ticket details are as follows:

Ticket	Last Updated	Subject	From	Priority	Assigned To
908086	6/9/22 12:02 PM	osTicket Installed!	osTicket Support	Normal	
240812	6/17/22 4:27 PM	Re: osTicket test email	Sakshi Kashyap	High	
750808	6/17/22 10:11 AM	Test email	Vishal Kumar	Normal	
721901	6/16/22 10:29 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
700375	6/16/22 9:08 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
178273	6/16/22 8:12 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
801049	6/16/22 3:43 PM	Undelivered Mail Returned to Sender	Mail Delivery System	Normal	
104821	6/16/22 3:43 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
702195	6/16/22 3:43 PM	Test mail reply	Sakshi Kashyap	Normal	
723161	6/16/22 3:43 PM	Undelivered Mail Returned to Sender	Mail Delivery System	Normal	
565200	6/16/22 3:43 PM	Testing	Sakshi Kashyap	Normal	
233888	6/16/22 3:43 PM	Welcome to your new Outlook.com ac...	Outlook Team	Normal	
594175	6/16/22 3:43 PM	Testing mail	Sakshi Kashyap	Normal	

The screenshot shows the osTicket Ticket #240812 page. The ticket details are as follows:

Status: Open	User: Sakshi Kashyap (8) (Manage Collaborators)
Priority: High	Email: sk19sakshikashyap@gmail.com
Department: Support	Source: Email
Create Date: 6/17/22 4:27 PM	

Assigned To: — Unassigned — Help Topic: None
SLA Plan: Default SLA Last Message: 6/17/22 4:27 PM
Due Date: 6/21/22 4:27 PM Last Response:

Ticket Thread (1)

Sakshi Kashyap posted 6/17/22 4:27 PM Re: osTicket test email

It works!

On Fri, Jun 17, 2022 at 4:24 PM Sakshi sakshi@skashyap.baskethunt.xyz> wrote:

Hi.... This is a test mail.
//Testing ticket filters

Created by Sakshi Kashyap 6/17/22 4:27 PM
Sakshi Kashyap Filter set Department to Support 6/17/22 4:27 PM
Sakshi Kashyap Filter set Priority to High 6/17/22 4:27 PM

This is how the ticket matching the rules of filter is assigned **High** priority and department as **Support**.

6.

Adding New department, teams, agents & roles

In a company, there is a need of handling the emails of a particular issue by a particular department and team so that the tickets can be assigned to the right agents and there exists a smooth workflow.

- Admin Panel > Agents > Departments > Add New Department

The screenshot shows the OSTicket Admin Panel with the 'Agents' tab selected. In the top right, it says 'Welcome, Sakshi.' with links for Agent Panel, Profile, and Log Out. Below the header, there are navigation links: Dashboard, Settings, Manage, Emails, Agents (selected), Teams, Roles, and Departments. The 'Departments' section is displayed with a table. The table has columns: Name, Status, Type, Agents, Email Address, Manager, and Created. Two rows are visible: 'Maintenance' (Active, Public, 0 agents, Support <skashyap@baskethunt.xyz>, created 2022-06-09 06:32:54) and 'Support (Default)' (Active, Public, 1 agent, Support <skashyap@baskethunt.xyz>, created 2022-06-09 06:32:54). At the bottom of the table, there are buttons for Select: All, None, Toggle, and Page: [1]. A large red arrow points from the text above to the 'Add New Department' button at the top right of the table area. The button is highlighted with a red box. Below the table, a copyright notice reads 'Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved.'

- Now start filling the details as per the requirements. In the **Parent** field, if your department is a child of another parent department, then choose that particular parent otherwise create using Top Level department.
- Give appropriate name and make the **status Active** with type of your choice (Public/Private).
- **SLA** is Service Level Agreement for tickets routed to this Department. This is 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.
- **Schedule** is used by the SLA when rendering tickets routed to this Department. This setting takes precedence over System and SLA schedule settings.
- Electively, select a **Manager** for the departments of the help desk. Managers can be configured to receive special alerts.

Outgoing mail settings -

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



Welcome, Sakshi. | Agent Panel | Profile | Log Out

Dashboard Settings Manage Emails Agents

Agents Teams Roles Departments

Add New Department

Settings Access

Department Information

Parent:	— Top-Level Department — *
Name:	Report issue *
Status:	Active
Type:	<input checked="" type="radio"/> Public <input type="radio"/> Private (Internal)
SLA:	Default SLA (18 hours - Active)
Schedule:	24/7
Manager:	Kashyap, Sakshi
Ticket Assignment:	Department Members
Claim on Response:	<input type="checkbox"/> Disable auto claim
Reopen Auto Assignment:	<input type="checkbox"/> Disable auto assign on reopen
Outgoing Email Settings:	
Outgoing Email:	Sakshi <sakshi@skashyap.baskethunt.xyz>
Template Set:	— System Default —
Autoresponder Settings:	
New Ticket:	<input type="checkbox"/> Disable for this department
New Message:	<input type="checkbox"/> Disable for this department
Auto-Response Email:	— Department Email —
Alerts and Notices:	
Recipients:	Department and extended access members
Department Signature:	

Autoresponder Settings -

- **New Ticket** and **New Message** will be displayed once the ticket is directed to this department. Therefore, do not check the box.
- **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.

• Admin Panel > Agents > Departments > Add New Team



Welcome, Sakshi. | Agent Panel | Profile | Log Out

Dashboard Settings Manage Emails Agents

Agents Teams Roles Departments

Teams

Add New Team More

Team Name	Status	Members	Team Lead	Created	Last Updated
Level I Support	Active	0		6/9/22	6/9/22 12:02 PM

Select: All None Toggle
Page: [1]

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Welcome, Sakshi. | Agent Panel | Profile | Log Out

Dashboard Settings Manage Emails Agents

Agents Teams Roles Departments

Update Team — Access Services

Team **Members**

Team Information:

Name: Access Services *

Status: Active Disabled *

Team Lead: Avantika Pandey *

Assignment Alert: Disable for this team *

Admin Notes: Internal notes viewable by all admins.

Save Changes Reset Cancel

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Now fill all the details (name, team lead) to create new team in **Team** section. In **Members** section, add the team members and save changes.



Welcome, Sakshi. | Agent Panel | Profile | Log Out

Dashboard Settings Manage Emails Agents

Agents Teams Roles Departments

Update Team — Access Services

Team **Members**

Team Members

Agents who are members of this team

Avantika Pandey	<input checked="" type="checkbox"/> Alerts	
Manorama Mudgal	<input checked="" type="checkbox"/> Alerts	
Sakshi Kashyap	<input checked="" type="checkbox"/> Alerts	

+ — Select Agent —

Save Changes Reset Cancel

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The new team named "Access Service" has been created as shown below.

This screenshot shows the OSTicket Admin Panel with the 'Agents' tab selected. The 'Teams' section is displayed, showing two teams: 'Access Services' and 'Level I Support'. Both teams are active, with 'Access Services' having 3 members and 'Level I Support' having 0 members. The 'Team Lead' for both is Avantika Pandey. The 'Created' date for 'Access Services' is 6/20/22, and for 'Level I Support' is 6/9/22. The 'Last Updated' date for 'Access Services' is 6/20/22 12:44 AM, and for 'Level I Support' is 6/9/22 12:02 PM. A 'More' button is visible at the top right of the table.

- Admin Panel > Agents > Departments > Add New Agent

This screenshot shows the OSTicket Admin Panel with the 'Agents' tab selected. The 'Agents' section is displayed, showing three agents: Avantika Pandey, Manorama Mudgal, and Sakshi Kashyap. All three agents are active, belonging to the 'Report Issue', 'Maintenance', and 'Support' departments respectively. The 'Created' date for all three is 6/20/22, and their last login status is 'never'. A large black arrow points to the 'Add New Agent' button at the top right of the table.

Fill all the details of the new agent to be created in **Account** section.

This screenshot shows the 'Add New Agent' form in the OSTicket Admin Panel. The form is divided into several sections: 'Account' (selected), 'Access', 'Permissions', and 'Teams'. In the 'Account' section, there is a placeholder profile picture, fields for Name (Khaviya Venkataraj), Email Address (kvenkatara@baskethunt.in), Phone Number, and Mobile Number. Below these, the 'Authentication' section contains a 'Username' field (kvenkatara) and a 'Set Password' link. The 'Status and Settings' section includes checkboxes for Locked (unchecked), Administrator (checked), Limit ticket access to ONLY assigned tickets (checked), and Vacation Mode (unchecked).

Now, grant access to the agent such as primary department, extended access in **Access** section.

Welcome, Sakshi. | Agent Panel | Profile | Log Out

Agents

Add New Agent

Access

Primary Department *

Report issue All Access Fall back to primary role on assignments

Extended Access

Support — Select Role — Alerts

— Select Department — Add

Create Reset Cancel

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Now grant permissions and assign a team (if any) to the agent and click on **Create** button.

Welcome, Sakshi. | Agent Panel | Profile | Log Out

Agents

Add New Agent

Permissions

Users Organizations Knowledgebase Miscellaneous

Create — Ability to add new users
 Delete — Ability to delete users
 Edit — Ability to manage user information
 Manage Account — Ability to manage active user accounts
 User Directory — Ability to access the user directory

Create Reset Cancel

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Welcome, Sakshi. | Agent Panel | Profile | Log Out

Agents

Add New Agent

Teams

Assigned Teams
Agent will have access to tickets assigned to a team they belong to regardless of the ticket's department. Alerts can be enabled for each associated team.

— Level I Support — Add

Create Reset Cancel

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The new agent has been created as shown below.

This screenshot shows the OSTicket interface under the 'Agents' tab. At the top, there's a navigation bar with links for Dashboard, Settings, Manage, Emails, Agents, Agents (selected), Teams, Roles, and Departments. Below the navigation is a search/filter bar with dropdowns for 'All Departments' and 'All Teams', and an 'Apply' button. A large 'Add New Agent' button is visible. The main area is titled 'Agents' and contains a table with columns: Name, Username, Status, Department, Created, and Last Login. The table lists four agents: Avantika Pandey, Khaviya Venkataraj, Manorama Mudgal, and Sakshi Kashyap. Each row includes a checkbox for selection. At the bottom, there are buttons for 'Select: All', 'None', and 'Toggle', and a 'Page: [1]' indicator. The footer displays the copyright notice: 'Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved.'

You can filter agents by applying filters in department and teams.

This screenshot shows the same OSTicket interface as above, but with filters applied. An arrow points to the 'Support' filter in the 'Departments' dropdown. Another arrow points to the 'Access Services' filter in the 'Teams' dropdown. The table below shows a single result for Sakshi Kashyap, who is assigned to the Support department and has the Access Services role. The rest of the interface is identical to the first screenshot.

- Admin Panel > Agents > Departments > Roles

This screenshot shows the OSTicket interface under the 'Roles' tab. The navigation bar and search/filter bar are identical to the previous screenshots. The main area is titled 'Roles' and contains a table with columns: Name, Status, Created On, and Last Updated. The table lists four roles: All Access, Expanded Access, Limited Access, and View only. Each row includes a checkbox for selection. At the bottom, there are buttons for 'Select: All', 'None', and 'Toggle', and a 'Page: [1]' indicator. The footer displays the copyright notice: 'Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved.'

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.

7. Help Topics

Configurable help topics for web tickets allow us to route inquiries to exactly the right department for swift resolution. Help Topics will help streamline the end-user's help desk experience to ensure proper assignment and prompt response 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.

- Admin Panel > Manage > Help Topics > **Add New Help Topic**

The screenshot shows the OSTicket Admin Panel with the 'Manage' tab selected. In the top right of the main content area, there is a button labeled 'Add New Help Topic'. This button is highlighted with a red rectangular box and has a black arrow pointing towards it from the left.

	Help Topic	Status	Type	Priority	Department	Last Updated	Created
<input type="checkbox"/>	Feedback	Active	Public	Low	Support	6/9/22 12:02 PM	6/9/22 12:02 PM
<input type="checkbox"/>	General Inquiry	Active	Public	Normal	Support	6/9/22 12:02 PM	6/9/22 12:02 PM
<input type="checkbox"/>	Report a Problem	Active	Public	Normal	Maintenance	6/9/22 12:02 PM	6/9/22 12:02 PM
<input type="checkbox"/>	Report a Problem / Access Issue	Active	Public	High	Support	6/9/22 12:02 PM	6/9/22 12:02 PM

The screenshot shows the 'Update Help Topic' form for 'General Inquiry'. The 'Topic' field is highlighted with a red box and has a black arrow pointing to it from the left. A yellow callout box contains the text: 'Add help topic name and keep the status active.'

The 'Status' field is set to 'Active'. The 'Type' field has 'Public' selected. The 'Parent Topic' dropdown is set to 'Top-Level Topic'. The 'Internal Notes' section contains the text: 'Internal Notes: Be liberal, they're internal'. The 'Description' section contains the text: 'Questions about products or services'.

A yellow callout box with a black arrow points to the 'Description' section with the text: 'Internal description of the help topic should be provided here.'

OSTicket

Welcome, Sakshi. | Agent Panel | Profile | Log Out

Dashboard Settings Manage Emails Agents

Help Topics Filters SLA Schedules API Pages Forms Lists Plugins

Update Help Topic — General Inquiry

New ticket options

Department:	Enquiry	Tickets with this help topic will be assigned to specified department.
Ticket Number Format:	System Default	This will determine the tickets sort order in the Open Tickets queue of the Agent Panel.
Status:	Open	
Priority:	High	
SLA Plan:	— Department's Default —	
Thank-You Page:	— System Default —	
Auto-assign To:	Enquiry team	Tickets can be Auto-Assigned to an agent or a team when this help topic is chosen.
Auto-Response:	<input type="checkbox"/> Disable new ticket auto-response	

Save Changes **Reset** **Cancel**

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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.

OSTicket

Welcome, Sakshi. | Agent Panel | Profile | Log Out

Dashboard Settings Manage Emails Agents

Help Topics Filters SLA Schedules API Pages Forms Lists Plugins

Update Help Topic — General Inquiry

Forms

Ticket Details
Please Describe Your Issue

Enable	Label	Type	Visibility	Variable
<input checked="" type="checkbox"/>	Issue Summary	Short Answer	Required	subject
<input checked="" type="checkbox"/>	Issue Details	Thread Entry	Required, Immutable	message
<input checked="" type="checkbox"/>	Priority Level	Priority Level	Internal, Optional	priority

Add Custom Form: — Add a custom form —

Save Changes **Reset** **Cancel**

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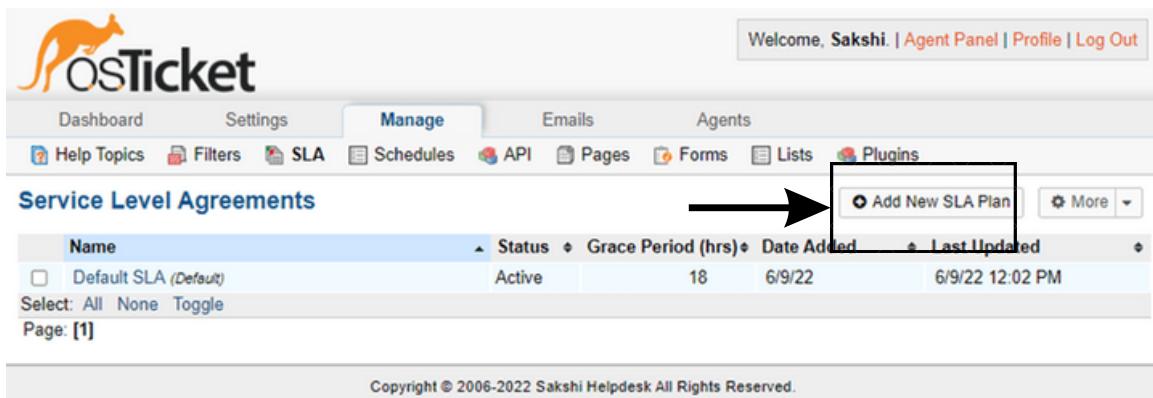
8.

Service Level Agreements

The purpose of the SLA Plan is to provide a length of time in which the help desk Administrator expects tickets to be closed. 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.

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.

- Admin Panel > Manage > **SLA (Service Level Agreements)**



The screenshot shows the OSTicket Admin Panel with the 'Manage' tab selected. The 'Service Level Agreements' section is displayed, showing a table with one row. The row contains the following data:

Name	Status	Grace Period (hrs)	Date Added	Last Updated
Default SLA (Default)	Active	18	6/9/22	6/9/22 12:02 PM

A red box highlights the 'Add New SLA Plan' button in the top right corner of the table header area. An arrow points to this button from the left.

Fill all the details as per the requirement of SLA plan -

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.



Welcome, Sakshi. | [Agent Panel](#) | [Profile](#) | [Log Out](#)

[Dashboard](#) [Settings](#) **Manage** [Emails](#) [Agents](#)

[Help Topics](#) [Filters](#) [SLA](#) [Schedules](#) [API](#) [Pages](#) [Forms](#) [Lists](#) [Plugins](#)

Add New SLA Plan

Tickets are marked overdue on grace period violation.

Name:	Emergency	*
Status:	<input checked="" type="radio"/> Active <input type="radio"/> Disabled	*
Grace Period:	24	(in hours)
Schedule:	24/7	
Transient:	<input checked="" type="checkbox"/> SLA can be overridden on ticket transfer or help topic change	
Ticket Overdue Alerts:	<input type="checkbox"/> Disable overdue alerts notices. (Override global setting)	
<i>Internal Notes: Be liberal, they're internal</i>		

[Add Plan](#) [Reset](#) [Cancel](#)

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Schedules -

Setting up a schedule lets you specify hours of operation for your help desk so that Tickets will only be marked overdue during those times. If you assign a Schedule to an SLA, Tickets will only be marked as overdue within the Business Hours specified in that Schedule.

You can create and configure schedules by going to

Admin Panel > Manage > Schedules

API Keys -

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

You can create and configure API keys by going to

Admin Panel > Manage > API Keys

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 page.

You can create and configure pages by going to

Admin Panel > Manage > Pages

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.

You can create and configure forms by going to

Admin Panel > Manage > 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.

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.

Lists -

Custom Lists permit the creation of dropdown boxes with predefined options from which an End-User can select on a form.

You can create and configure pages by going to

Admin Panel > Manage > Lists> Add New Custom List

Plugins -

Plug-in also called add-on or extension, is a computer software that adds new functions to a host program without altering the host program itself.

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

You can create and configure pages by going to

Admin Panel > Manage > Plugins

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

9.

Advanced Search, Assign, Transfer & Referral of Tickets

Assigning, transferring and referring a ticket to a particular department, team or agent can be done either manually or automatically using filters and help topics.

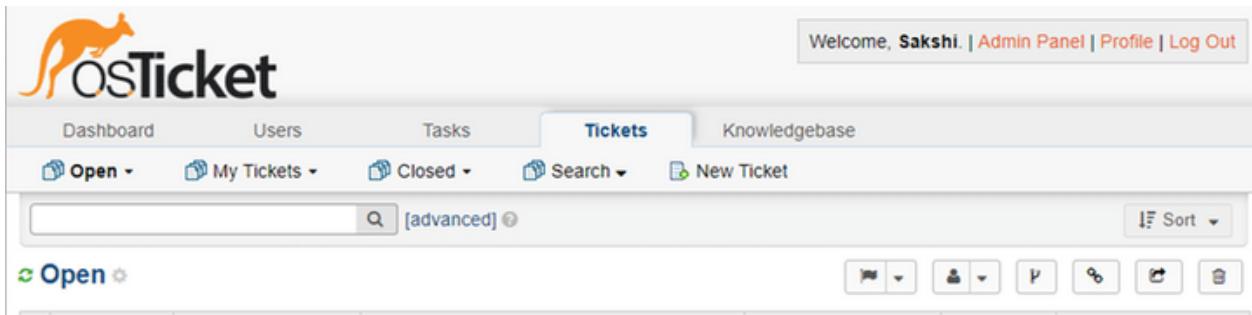
Assign, transfer & referral of tickets manually -

- **Agent Panel > Tickets**

The screenshot shows the osTicket Agent Panel interface. At the top, there's a navigation bar with links for Dashboard, Users, Tasks, Tickets (which is the active tab), and Knowledgebase. Below the navigation is a toolbar with buttons for Open, My Tickets, Closed, Search, and New Ticket. A search bar labeled '[advanced]' is present. The main area displays a table of tickets under the 'Open' tab. The columns are: Ticket, Last Updated, Subject, From, Priority, and Assigned To. The table contains 15 rows of ticket information. At the bottom of the table, there are buttons for Select: All, None, Toggle, and Page: [1] Export. A note says 'Showing 1 - 15 of about 15'. The footer of the page includes a copyright notice: 'Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved.'

Ticket	Last Updated	Subject	From	Priority	Assigned To
908086	6/9/22 12:02 PM	osTicket Installed!	osTicket Support		
240812	6/17/22 4:27 PM	Re: osTicket test email	Sakshi Kashyap	High	Khaviya Venkataraj
712627	6/20/22 12:59 AM	Undeliverable: Welcome to osTicket	Microsoft Outlook	Normal	
768957	6/20/22 12:41 AM	Undeliverable: Welcome to osTicket	Microsoft Outlook	Normal	
750808	6/17/22 10:11 AM	Test email	Vishal Kumar	Normal	Sakshi Kashyap
721901	6/16/22 10:29 PM	Re: osTicket test email	Sakshi Kashyap	Normal	Khaviya Venkataraj
700375	6/16/22 9:08 PM	Re: osTicket test email	Sakshi Kashyap	Normal	Khaviya Venkataraj
178273	6/16/22 8:12 PM	Re: osTicket test email	Sakshi Kashyap	Normal	Khaviya Venkataraj
801049	6/16/22 3:43 PM	Undelivered Mail Returned to Sender	Mail Delivery System	Normal	
104821	6/16/22 3:43 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
702195	6/16/22 3:43 PM	Test mail reply	Sakshi Kashyap	Normal	
723161	6/16/22 3:43 PM	Undelivered Mail Returned to Sender	Mail Delivery System	Normal	
565200	6/16/22 3:43 PM	Testing	Sakshi Kashyap	Normal	
233888	6/16/22 3:43 PM	Welcome to your new Outlook.co...	Outlook Team	Normal	
594175	6/16/22 3:43 PM	Testing mail	Sakshi Kashyap	Normal	

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

1. **Open** - These are tickets Open in the Help Desk including both New Tickets and tickets that the end user is the last respondent on. It consists of a dropdown list having Answered and Overdue options which show the answered tickets and tickets went overdue respectively.
2. **My Tickets** - These are tickets that are assigned directly to the Agent or a team the Agent is assigned (*Assigned to me / Assigned to team*).
3. **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.

4. Advanced Search -

First method - Type in the keyword or ticket number in the search bar.

Number	Created	Subject	From	Priority	Assignee
240812	6/17/22 4:27 PM	Re: osTicket test email	Sakshi Kashyap	High	Khaviya Venkataraman
178273	6/16/22 3:43 PM	Re: osTicket test email	Sakshi Kashyap	Normal	Khaviya Venkataraman
565200	6/16/22 3:43 PM	Testing	Sakshi Kashyap	Normal	
594175	6/16/22 3:43 PM	Testing mail	Sakshi Kashyap	Normal	

Select: All None Toggle
Page: [1] 2 3 4 5 6 7 8 9 10 > Export

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Searches can be exported showing whichever columns you choose using this option. Just check in the columns and export.

Second method - Click on **[advanced]** option. This feature allows you to easily retrieve the exact information you want to see.

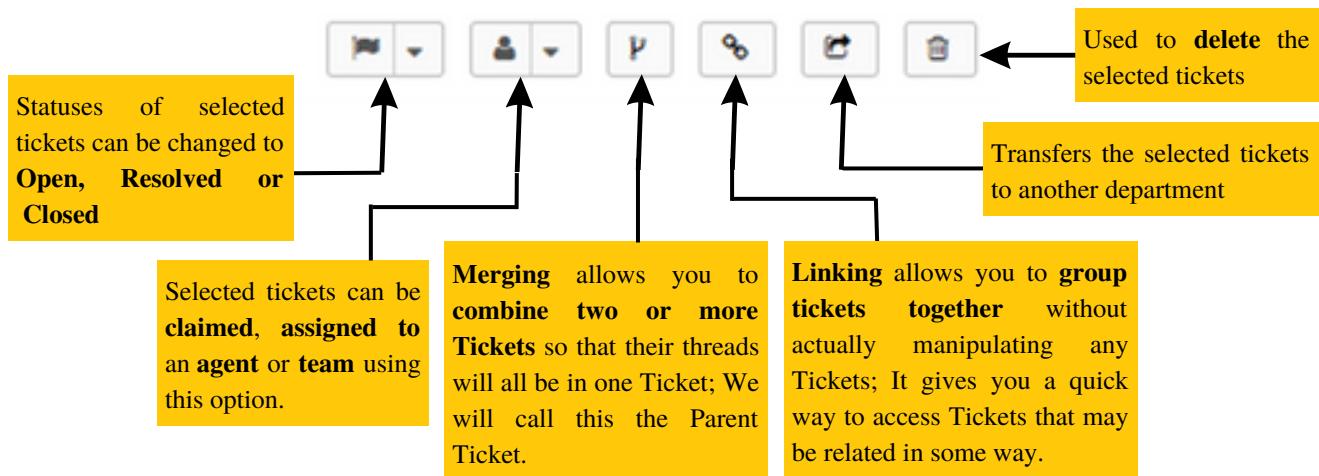
For example, you can search for all tickets in a single department assigned to you or any of the agent or your team member (*as shown below*).

The screenshot shows the OSTicket interface with the 'Tickets' tab selected. A modal window titled 'Advanced Ticket Search' is open. In the search criteria, 'Department' is set to 'Support' and 'Assignee' is set to 'Me'. The results pane on the right shows 25 tickets assigned to 'Me'.

Searches can also be saved and customized using the settings options just after advanced search and click on 'Edit'.

The screenshot shows the search results for the query "testing". At the bottom, there is a 'Save Search' section. A green checkmark is shown next to the 'Save' button, indicating that the search has been successfully saved. The search term "testing" is also highlighted in the search bar.

5. New Ticket - New tickets can be created using this option.



Assign tickets automatically -

- You can manage automatic assignment in the "Admin panel". Enter in "Manage > Help Topic", then click on one "Help topic" item. Now you will be able to see the drop down list "Auto-assign To". Choose the member and save.
- **Ticket filters** can be used to auto assign the ticket to a particular agent or team based on the rule criteria set.
- **Agent Panel > Tickets**

The screenshot shows the osTicket Agent Panel interface. At the top, there's a navigation bar with links for Dashboard, Users, Tasks, Tickets (which is the active tab), and Knowledgebase. Below the navigation is a search bar with options for [advanced] and Sort. The main area displays a table of open tickets:

Ticket	Last Updated	Subject	From	Priority	Assigned To
908086	6/9/22 12:02 PM	osTicket Installed!	osTicket Support		
240812	6/17/22 4:27 PM	Re: osTicket test email	Sakshi Kashyap	High	Khaviya Venkatraj
712627	6/20/22 12:59 AM	Undeliverable: Welcome to osTicket	Microsoft Outlook	Normal	
768957	6/20/22 12:41 AM	Undeliverable: Welcome to osTicket	Microsoft Outlook	Normal	
750808	6/17/22 10:11 AM	Test email	Vishal Kumar	Normal	Sakshi Kashyap
721901	6/16/22 10:29 PM	Re: osTicket test email	Sakshi Kashyap	Normal	Khaviya Venkatraj
700375	6/16/22 9:08 PM	Re: osTicket test email	Sakshi Kashyap	Normal	Khaviya Venkatraj
178273	6/16/22 8:12 PM	Re: osTicket test email	Sakshi Kashyap	Normal	Khaviya Venkatraj
801049	6/16/22 3:43 PM	Undelivered Mail Returned to Sender	Mail Delivery System	Normal	
104821	6/16/22 3:43 PM	Re: osTicket test email	Sakshi Kashyap	Normal	
702195	6/16/22 3:43 PM	Test mail reply	Sakshi Kashyap	Normal	
723161	6/16/22 3:43 PM	Undelivered Mail Returned to Sender	Mail Delivery System	Normal	
565200	6/16/22 3:43 PM	Testing	Sakshi Kashyap	Normal	
233888	6/16/22 3:43 PM	Welcome to your new Outlook.co...	Outlook Team	Normal	
594175	6/16/22 3:43 PM	Testing mail	Sakshi Kashyap	Normal	

At the bottom, there are buttons for Select: All, None, Toggle, Page: [1], Export, and Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved.

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.

The screenshot shows a ticket reply form. At the top, there are buttons for "Post Reply" and "Post Internal Note". Below that, the "From" field is set to "Support <skashyap@baskethunt.xyz>". The "Recipients" field lists "Vishal Kumar" <vishal.kumar@baskethunt.in> and "Collaborators (1 of 1)". The "Reply To" field is set to "All Active Recipients". The "Response" field has a dropdown menu with "Select a canned response". Below these fields is a rich text editor toolbar with various icons. A text area below the toolbar contains the placeholder text "Start writing your response here. Use canned responses from the drop-down above". At the bottom of the form, there is a file upload section with the placeholder "Drop files here or choose them". Underneath the file upload section, there are two signature options: "None" (selected) and "Department Signature (Support)". The "Ticket Status" dropdown is set to "Open (current)". At the very bottom of the form are two buttons: "Post Reply" (highlighted in orange) and "Reset".

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- 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.

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.

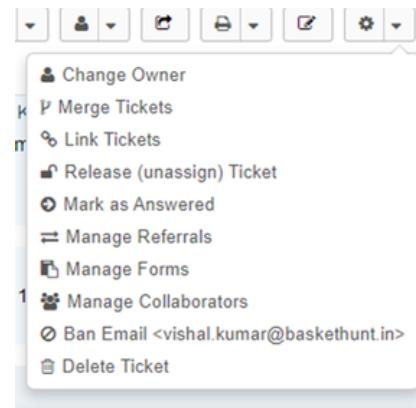
The screenshot shows the OSTicket ticket details page for ticket #750808. At the top, there is a navigation bar with links for Dashboard, Users, Tasks, Tickets (selected), and Knowledgebase. There are also buttons for Open, My Tickets, Closed, Search, and New Ticket. The main content area displays the ticket header information. It includes fields for Status (Open), Priority (Normal), Department (Support), Create Date (6/17/22 10:11 AM), Assigned To (Sakshi Kashyap), SLA Plan (Default SLA), Due Date (6/21/22 10:11 AM), User (Vishal Kumar (1)), Email (vishal.kumar@baskethunt.in), Source (Email), Help Topic (None), Last Message (6/17/22 10:11 AM), and Last Response (empty). Below this, there is a "Test email" section and a toolbar with various icons for managing the ticket.

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.

-> *Merge or link* two or more tickets.

-> *Unassign* tickets, *mark them as answered*, *manage referrals*, *forms and collaborators*.



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

User:	Vishal Kumar (1) (1)
Email:	vishal.kumar@baskethunt.in

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 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.

Clicking on "Manage User" will redirect you to the User's profile in the User Directory. Same for if you 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.

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)

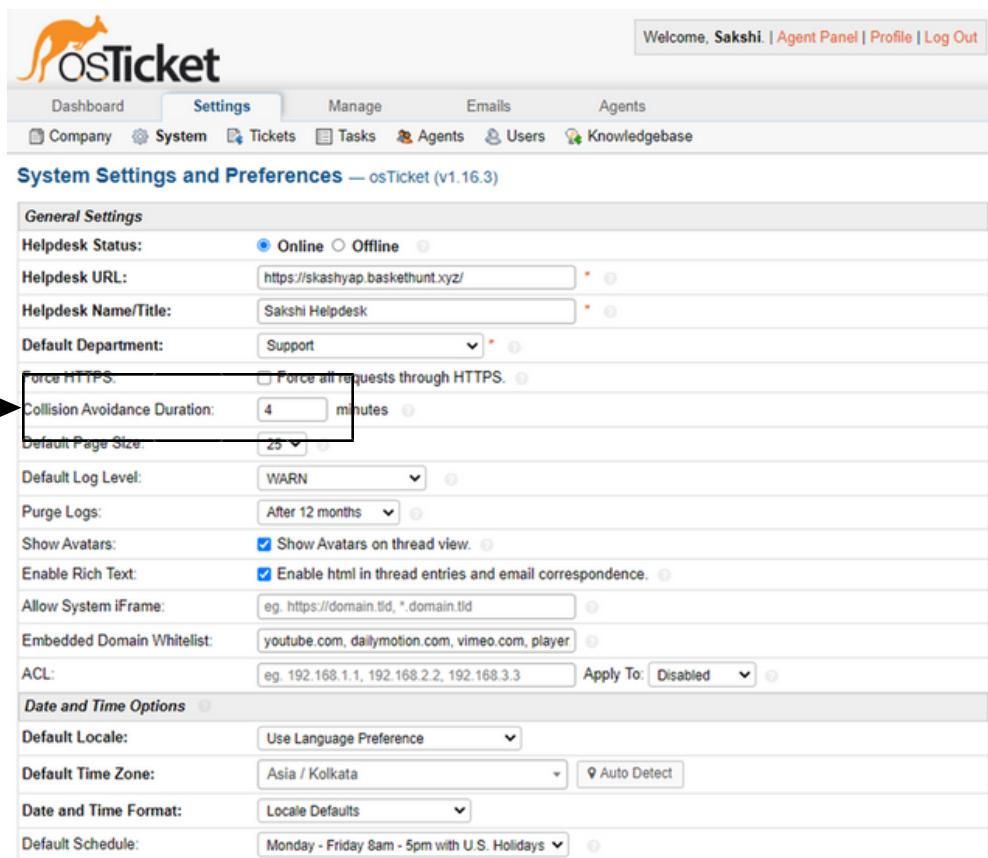

- Agent's response back to the Ticket Owner or Collaborator will appear with an Orange Banner.


10.

Agent Collision Avoidance

Ticket locking mechanism allows staff to lock tickets during response to avoid conflicting or dual responses. This avoid multiple agents responding to the same ticket at the same time.

- Admin Panel > Settings > System



The screenshot shows the osTicket Admin Panel with the following details:

- General Settings** section.
- Helpdesk Status:** Online (radio button selected).
- Helpdesk URL:** https://skashyap.baskethunt.xyz/
- Helpdesk Name/Title:** Sakshi Helpdesk
- Default Department:** Support
- Force HTTPS:** Force all requests through HTTPS.
- Collision Avoidance Duration:** 4 minutes (highlighted with a red box)
- Default Page Size:** 25
- Default Log Level:** WARN
- Purge Logs:** After 12 months
- Show Avatars:** Show Avatars on thread view.
- Enable Rich Text:** Enable html in thread entries and email correspondence.
- Allow System iFrame:** eg. https://domain.tld, *.domain.tld
- Embedded Domain Whitelist:** youtube.com, dailymotion.com, vimeo.com, player
- ACL:** eg. 192.168.1.1, 192.168.2.2, 192.168.3.3 **Apply To:** Disabled
- Date and Time Options** section.
- Default Locale:** Use Language Preference
- Default Time Zone:** Asia / Kolkata **Auto Detect:**
- Date and Time Format:** Locale Defaults
- Default Schedule:** Monday - Friday 8am - 5pm with U.S. Holidays

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.

Helpdesk Status: If the status is changed to Offline, the client interface will be disabled.

Helpdesk URL: This URL 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.

Force HTTPS: This setting allows Admins to configure whether or not they want to Force HTTPS system-wide.

Date and Time Options

Default Locale: Use Language Preference

Default Time Zone: Asia / Kolkata

Date and Time Format: Locale Defaults

Default Schedule: Monday - Friday 8am - 5pm with U.S. Holidays

System Languages

Primary Language: English (United States)

Secondary Languages: Add a Language

Attachments Storage and Settings

Store Attachments: In the database

Agent Maximum File Size: 256 mb

Login required: Require login to view any attachments

Save Changes **Reset Changes**

Date and Time Settings -

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.

System Settings -

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

Attachment Settings and Storage -

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.

- **Admin Panel > Settings > Company**

Basic Information Tab: This tab contains the information that will be pulled into the email templates for the help desk company information, including Company Name, address, etc.

Site Pages Tab: This is where you choose the layout your User will see for common pages (Landing page, Offline page, Default Thank You page).

Logos Tab: The help desk can be branded with a company logo by uploading a company logo here.

Login-Backdrop Tab: 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.

11.

Auto-Responder, Alerts & Notices, Queues

Ticket Settings & Options -

- Admin Panel > Settings > Tickets

The screenshot shows the 'Ticket Settings and Options' page in the Admin Panel. It includes sections for System-wide default ticket settings and attachments. Key settings include:

- Default Ticket Number Format: ##### (used to generate ticket numbers)
- Default Status: Open (Choose a status as the default for new tickets)
- Default Priority: Normal
- Default SLA: Default SLA (18 hours - Active) (Default Service Level Agreement to close ticket (in hours))
- Default Help Topic: None
- Lock Semantics: Lock on activity
- Default Ticket Queue: Open
- Maximum Open Tickets: [] per end user (Max no. of open tickets allowed per email/user; helps with spam and email flood control)
- Human Verification: Enable CAPTCHA on new web ticket
- Collaborator Tickets Visibility: Enable
- Claim on Response: Enable
- Auto-refer on Close: Enable
- Require Help Topic to Close: Enable
- Allow External Images: Enable

Attachments: Size and maximum uploads setting mainly apply to web tickets.

Ticket Attachment Settings: Config

Buttons: Save Changes, Reset Changes

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.

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

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.

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.

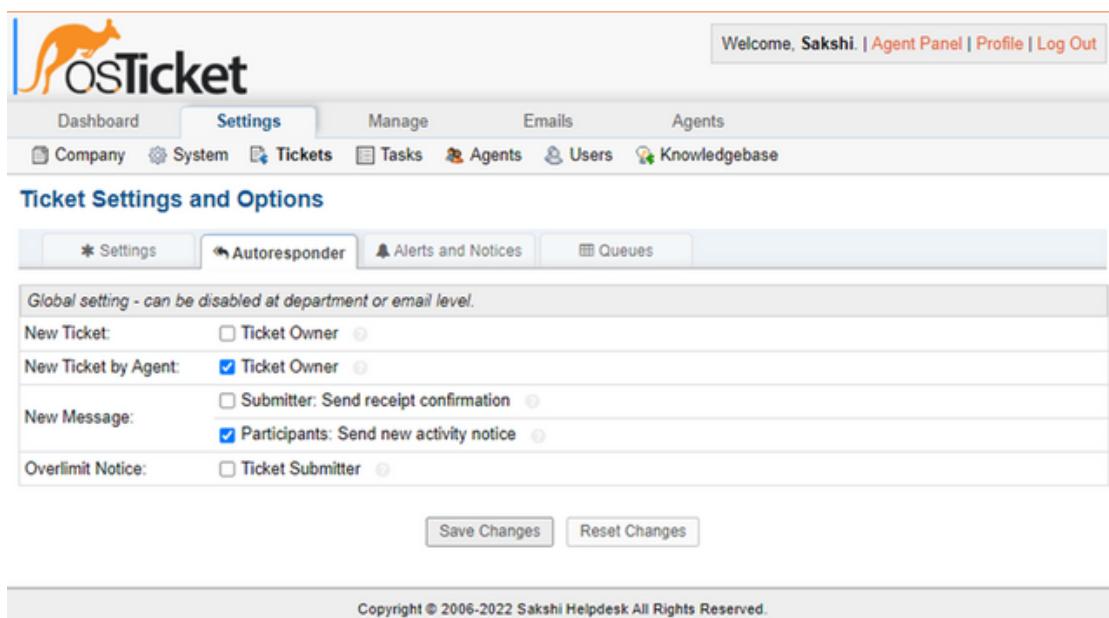
Collaborator Ticket Visibility: If Enabled, Users will have visibility to ALL Tickets they participate in when signing into the Web Portal.

Auto-refer on Close: Enable this to auto-refer tickets to the assigned or closing Agent when a ticket is closed. This is necessary when you want to give agents with limited access continued access to assigned tickets after they're closed.

Attachments: The configurations for this field is specific to the User attachment settings when opening a ticket on the help desk.

Auto-Responder -

Global setting for the Auto Responses which are sent to end users; can be disabled by departments, Help Topic, Ticket Filter, or email address.



The screenshot shows the OSTicket web interface. At the top, there's a navigation bar with links for Dashboard, Settings (which is currently selected), Manage, Emails, and Agents. Below the navigation is a secondary menu with links for Company, System, Tickets (selected), Tasks, Agents, Users, and Knowledgebase. The main content area is titled "Ticket Settings and Options". Under this, there are four tabs: * Settings, Autoresponder (which is active and highlighted in blue), Alerts and Notices, and Queues. A note below the tabs says "Global setting - can be disabled at department or email level." There are several sections with checkboxes:

- New Ticket: Ticket Owner (radio button)
- New Ticket by Agent: Ticket Owner (radio button)
- New Message: Submitter: Send receipt confirmation (radio button)
- New Message: Participants: Send new activity notice (radio button)
- Overlimit Notice: Ticket Submitter (radio button)

At the bottom of the form are two buttons: "Save Changes" and "Reset Changes". A copyright notice at the very bottom reads "Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved."

New Ticket: Enable this to send an auto-response to the User on new ticket creation.

New Ticket By Agent: Notice sent when an Agent creates a ticket on behalf of the User.

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 -

- Admin Panel > Settings > Tickets > **Alerts & Notices**

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

Queues -

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.

Name	Creator	Status	Created
Open	SYSTEM	Active	6/9/22
Open / Open	SYSTEM	Active	6/9/22
Open / Answered	SYSTEM	Active	6/9/22
Open / Overdue	SYSTEM	Active	6/9/22
My Tickets	SYSTEM	Active	6/9/22
My Tickets / Assigned to Me	SYSTEM	Active	6/9/22
My Tickets / Assigned to Teams	SYSTEM	Active	6/9/22
Closed	SYSTEM	Active	6/9/22
Closed / Today	SYSTEM	Active	6/9/22
Closed / Yesterday	SYSTEM	Active	6/9/22
Closed / This Week	SYSTEM	Active	6/9/22
Closed / This Month	SYSTEM	Active	6/9/22
Closed / This Quarter	SYSTEM	Active	6/9/22
Closed / This Year	SYSTEM	Active	6/9/22

Tasks -

- **Admin Panel > Settings > Tasks**

Tasks can be associated with tickets or they can stand alone in the help desk. When tasks are ticket-related, this prevents the tickets from being closed until all tasks within the ticket are complete. Add collaborators to include external users to the task items while keeping them separate from the ticket thread and contents.

- **Admin Panel > Settings > Agents**

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.

The screenshot shows the 'Agents Settings' page under the 'Settings' tab. The top navigation bar includes links for Dashboard, Settings, Manage, Emails, and Agents, along with sub-links for Company, System, Tickets, Tasks, Agents, Users, and Knowledgebase. The main content area is titled 'Agents Settings' and contains two tabs: '* Settings' (selected) and 'Templates'. The '* Settings' tab displays several configuration sections:

- General Settings**: Includes fields for Name Formatting (set to 'First Last'), Agent Identity Masking (unchecked), Avatar Source (set to 'Gravatar / Mystery Man'), and Disable Agent Collaborators (unchecked).
- Authentication Settings**: Includes fields for Password Policy (set to 'All Active Policies'), Allow Password Resets (checked), Reset Token Expiration (set to 30 minutes), Multifactor Authentication (unchecked), Agent Excessive Logins (set to 4 failed attempts before lockout, with a 2-minute lockout duration), and Agent Session Timeout (set to 30 minutes).
- Bind Agent Session to IP**: A checkbox is present but unchecked.

At the bottom of the page are 'Save Changes' and 'Reset Changes' buttons.

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

Configurable Agents As Collaborators: This allows Admins to globally configure the ability for Agents to be added as Collaborators via any communication on tickets.

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.

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.

- **Admin Panel > Settings > Agents > 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.

User Settings -

The screenshot shows the 'Users Settings' page in the OSTicket Admin Panel. The top navigation bar includes links for Dashboard, Settings (which is selected), Manage, Emails, and Agents. Below the navigation is a sub-menu with Company, System, Tickets, Tasks, Agents, Users, and Knowledgebase. The main content area is titled 'Users Settings' and contains two tabs: 'Settings' (selected) and 'Templates'. Under 'General Settings', there are fields for Name Formatting (set to 'As Entered') and Avatar Source (set to 'Gravatar / Mystery Man'). Under 'Authentication Settings', there are several configuration options: 'Registration Required' (unchecked), 'Registration Method' (set to 'Public — Anyone can register'), 'Password Policy' (set to 'All Active Policies'), 'User Excessive Logins' (set to 4 failed attempts before lockout, with 2 minutes locked out), 'User Session Timeout' (set to 30 minutes), 'Authentication Token' (checked, enabling auto-login), and 'Client Quick Access' (checked, requiring email verification for ticket status checks). At the bottom of the page are 'Save Changes' and 'Reset Changes' buttons, and a copyright notice: 'Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved.'

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.

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.

12.

Multifactor Authentication

Multifactor Authentication, sometimes referred to as Two Factor Authentication, adds an extra layer of authentication set up for Agents, when they log into the helpdesk. Once they correctly submit their username and password, they will be required to submit a token to finish logging into the helpdesk.

By default, Agents are not required to set up Multifactor Authentication. An administrator can require Multifactor Authentication by going to:

- **Admin Panel > Settings > Agents > Require agents to turn on 2FA**

The screenshot shows the OSTicket Admin Panel with the following interface details:

- Header:** Welcome, Sakshi | Agent Panel | Profile | Log Out
- Navigation:** Dashboard, Settings (selected), Manage, Emails, Agents, Company, System, Tickets, Tasks, Agents, Users, Knowledgebase
- Message Bar:** Successfully updated Agent Settings and Options.
- Section:** Agents Settings
- Sub-section:** * Settings (selected), Templates
- General Settings:** Name Formatting (First Last), Agent Identity Masking (unchecked), Avatar Source (Gravatar / Mystery Man), Disable Agent Collaborators (unchecked).
- Authentication Settings:** Password Policy (All Active Policies), Allow Password Resets (checked), Reset Token Expiration (30 minutes), Multifactor Authentication (checkbox checked, highlighted with a red box and an arrow pointing to it).
 - Reset Token Expiration: 30 minutes
 - Multifactor Authentication: Require agents to turn on 2FA
- Agent Excessive Logins:** 4 failed login attempt(s) allowed before a lock-out is enforced, 2 minutes locked out.
- Agent Session Timeout:** 30 minutes (0 to disable).
- Bind Agent Session to IP:** (unchecked)
- Buttons:** Save Changes, Reset Changes
- Footer:** Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved.

Once enabled, Agents will be required to configure and save their Default 2FA method before accessing the helpdesk.

My Account Profile

Account **Preferences** **Signature**

Name: Sakshi Kashyap
Email Address: skashyap@baskethunt.in
Phone Number: _____ Ext _____
Mobile Number: _____

Authentication

Username: * skashyap **Change Password** **Configure Options** 

Default 2FA: Email **Configure Options** 

Status and Settings

Vacation Mode

Save Changes **Reset** **Cancel**

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Email 2FA Setup

Complete the form below and then click Next to verify the setup

Email Address: * *Valid email address*
  Write username+email_id here

Next  

Reset **Cancel**

OSTicket Welcome, Sakshi. | Admin Panel | Profile | Log Out

Dashboard **Users** **Tasks** **Tickets** **Knowledgebase**

Dashboard **Agent Directory** **My Profile**

Hi Sakshi - You must configure and save Two Factor Authentication!

My Account Profile

Account **Preferences** **Signature**

Name: Sakshi Kashyap
Email Address: skashyap@baskethunt.in
Phone Number: _____ Ext _____
Mobile Number: _____

Authentication

Username: * skashyap **Change Password** **Configure Options**

Default 2FA: Email **Configure Options**

Status and Settings

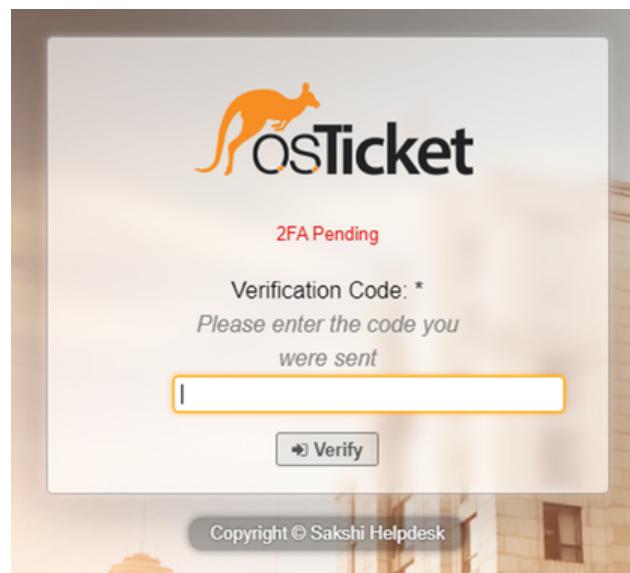
Vacation Mode

Save Changes **Reset** **Cancel**

The 2FA (two factor authentication) is enabled. Now, we will log out and login to see the feature.



After entering the login credentials at the login page of osticket, we get the screen as shown below -



 Support Sakshi Helpdesk <sakshi_osticket@outlook.com>
To: Sakshi Kashyap

Hi Sakshi,
You have just logged into for the helpdesk at <https://skashyap.baskethunt.xyz>.
Use the verification code below to finish logging into the helpdesk.
839660

Your friendly Customer Support System
powered by 

[Reply](#) [Forward](#)

The verification code on the mail id. This is how 2FA is implemented.

13.

Visibility Permissions

New Permissions have been added to limit the visibility of Departments, Agents, and Help Topics based on an Agent's Department access.

- Admin Panel > Agents > Select an Agent > Permissions Tab > **Miscellaneous**

The screenshot shows the OSTicket Admin Panel with the 'Agents' tab selected. Under 'Manage Agent — Avantika Pandey', the 'Permissions' tab is active, with the 'Miscellaneous' sub-tab selected. Two arrows point to the checked checkboxes under 'Miscellaneous': 'Agent — Ability to see Agents in all Departments' and 'Department — Ability to see all Departments'. At the bottom are 'Save Changes', 'Reset', and 'Cancel' buttons. A copyright notice at the bottom reads 'Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved.'

New Permissions:

‘Agent — Ability to see Agents in all Departments’

‘Department — Ability to see all Departments’

Both of these boxes are checked by default for new Agents as well as existing Agents.

We can see the access a particular agent has (here, Avantika Pandey)

The screenshot shows the OSTicket Admin Panel with the 'Agents' tab selected. Under 'Manage Agent — Avantika Pandey', the 'Access' tab is active. It displays sections for 'Primary Department' and 'Extended Access'. In 'Primary Department', dropdown menus for 'Report issue' and 'All Access' are shown, along with a checked checkbox for 'Fall back to primary role on assignments'. In 'Extended Access', there is a dropdown menu for 'Select Department' and an 'Add' button. At the bottom are 'Save Changes', 'Reset', and 'Cancel' buttons. A copyright notice at the bottom reads 'Copyright © 2006-2022 Sakshi Helpdesk All Rights Reserved.'

The Agent has the following set for Permissions:

Welcome, Sakshi. | Agent Panel | Profile | Log Out

Agents

Manage Agent — Avantika Pandey

Permissions

Users Organizations Knowledgebase Miscellaneous

Agent — Ability to see Agents in all Departments
 Banlist — Ability to add/remove emails from banlist via ticket interface
 Department — Ability to see all Departments
 Search — See all tickets in search results, regardless of access
 Stats — Ability to view stats of other agents in allowed departments

Save Changes Reset Cancel

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Canned Responses

This permission also limits Canned Responses that an Agent can see.

The Agent will only be able to see Canned Responses for Departments they can access (Primary or Extended Access) or Canned Responses assigned to all Departments.

Welcome, Sakshi. | Admin Panel | Profile | Log Out

Knowledgebase

FAQs Categories Canned Responses

Canned Responses

Add New Response More ▾

Title	Status	Department	Last Updated
Sample (with variables)	Active	All Departments	6/9/22 12:02 PM
What is osTicket (sample)? ↗	Active	All Departments	6/9/22 12:02 PM

Select: All None Toggle

Page: [1]

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Help Topics are hidden from the Agent Panel if they are assigned a Department an Agent does not have access to and the Agent does not have the ‘Ability to see all Departments’ permission checked.

14.

Password Management Policies

The Password Management Policies plugin allows helpdesk Administrators to enforce custom requirements for Agents' and Users' passwords in the helpdesk. Once installed and enabled, Administrators can configure Password Management Policies by going to:

- Admin Panel > Manage > Plugins > **Password Management Policies**

Welcome, Adriane1. | Agent Panel | Profile | Log Out

Manage Plugins

Currently Installed Plugins

Plugin Name	Version	Status	Date Installed
Help Desk Audit	0.1	Enabled	06/06/20 4:13 PM
LDAP Authentication and Lookup	0.6.2	Enabled	06/26/20 2:36 PM
OAuth2 Authentication and Lookup	0.1	Enabled	06/28/20 3:00 PM
Password Management Policies	0.1	Enabled	06/24/20 10:15 AM

Select: All None Toggle

Page: [1]

Welcome, Adriane1. | Agent Panel | Profile | Log Out

Manage Plugins — Password Management Policies

Configuration

Minimum length: * 8 Minimum characters required

Character classes required: * Three (3) Require this number of character classes: upper, lower, number, and special characters

Password strength: Disable Enforce minimum password entropy. See the wikipedia page for password strength for more reading on entropy

Enforce on login: Enforce password policies the next time a user logs in.

Password reuse: Allow reuse

Password expiration: Never expires Password reset frequency

Save Changes Reset Cancel