

osTicket Configuration and Customization

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Project Overview

Objective:

Customize and configure the osTicket helpdesk system post-installation to align with organizational structure, workflows, and user management.

Summary:

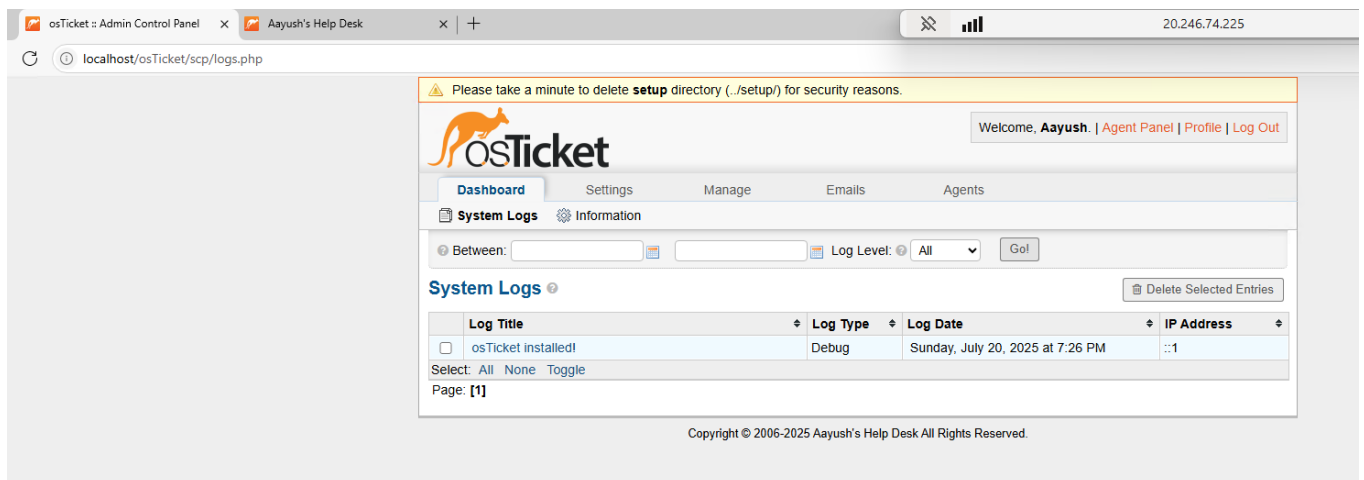
This project focused on configuring administrative settings in osTicket, including user access roles, departments, teams, SLAs, and help topics. The setup enhances ticket routing, prioritization, and visibility across different IT functions.

Tools & Technologies Used

- osTicket Admin Panel (<http://localhost/osTicket/scp/login.php>)
- osTicket End User Portal (<http://localhost/osTicket>)
- Web Browser Interface
- Role-Based Access Controls (RBAC)
- Service Level Agreement (SLA) Configuration

Key Tasks Performed

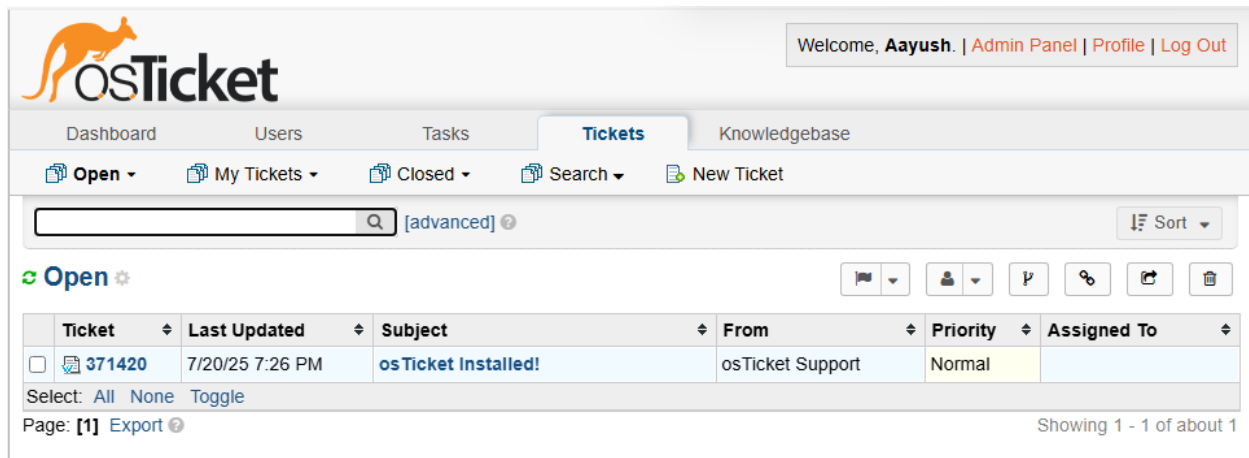
- Accessed osTicket Admin and Agent Panels via localhost URLs



The screenshot displays the osTicket Admin Panel interface. At the top, a navigation bar includes links for Dashboard, Settings, Manage, Emails, and Agents. Below this, the 'System Logs' section is active, showing a table of logs. A warning message at the top of the panel area states: 'Please take a minute to delete setup directory (./setup/) for security reasons.' The 'System Logs' table has columns for Log Title, Log Type, Log Date, and IP Address. The first entry is 'osTicket installed!' with a Log Type of 'Debug' and a Log Date of 'Sunday, July 20, 2025 at 7:26 PM'. The IP Address is '::1'. The interface also includes a 'Between:' date range selector, a 'Log Level' dropdown set to 'All', and a 'Go!' button. At the bottom, there is a 'Delete Selected Entries' button and a 'Page: [1]' indicator. The footer of the page reads: 'Copyright © 2006-2025 Aayush's Help Desk All Rights Reserved.'

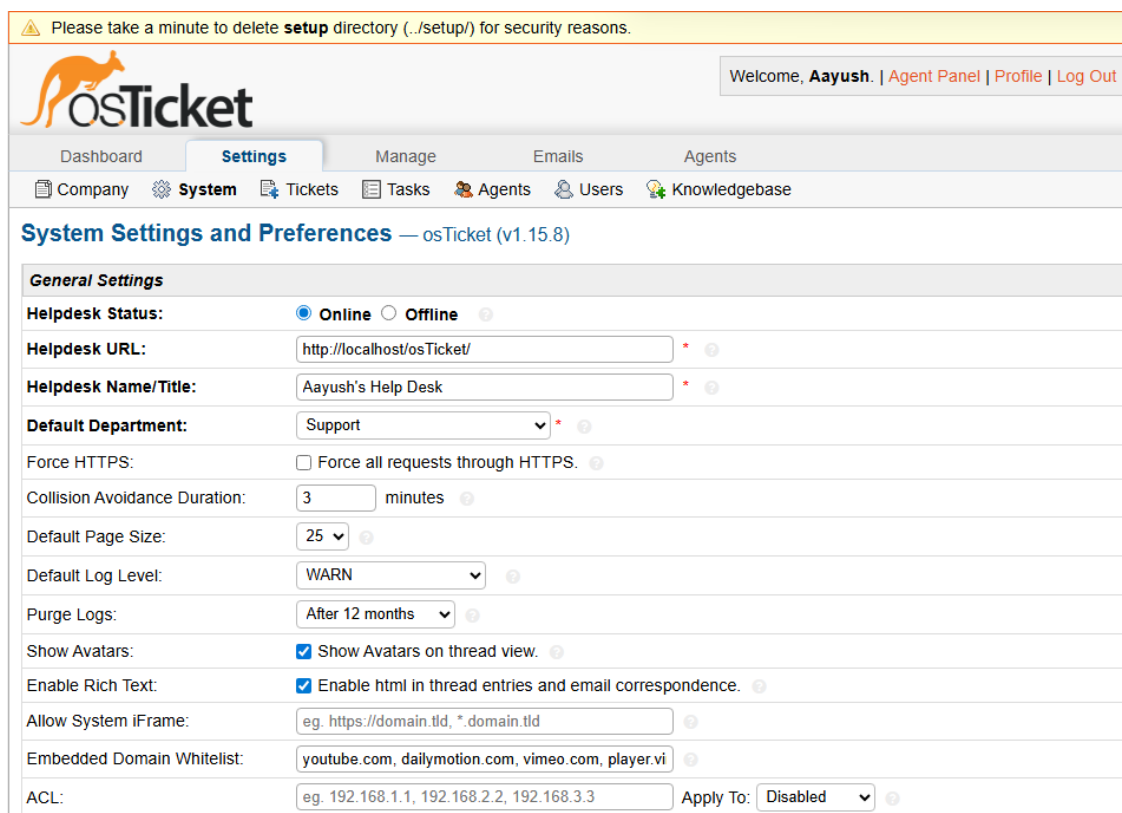
Log Title	Log Type	Log Date	IP Address
osTicket installed!	Debug	Sunday, July 20, 2025 at 7:26 PM	::1

- **Acknowledged interface structure:**
 - *Agent Panel:* Daily user/ticket interaction



The screenshot shows the osTicket Agent Panel interface. At the top, there's a header with the osTicket logo and a welcome message for 'Aayush' with links to 'Admin Panel', 'Profile', and 'Log Out'. Below the header is a navigation bar with tabs: 'Dashboard', 'Users', 'Tasks', 'Tickets' (selected), and 'Knowledgebase'. Under the 'Tickets' tab, there are buttons for 'Open', 'My Tickets', 'Closed', 'Search', and 'New Ticket'. A search bar with a magnifying glass icon and a '[advanced]' link is present. Below the search bar, there's a 'Sort' dropdown menu. The main content area shows a list of tickets. The first ticket is '371420' with the subject 'osTicket Installed!'. It was last updated on '7/20/25 7:26 PM' and is from 'osTicket Support' with a 'Normal' priority. At the bottom, there's a 'Page: [1] Export' link and a 'Showing 1 - 1 of about 1' message.

- *Admin Panel:* System configuration and settings




The screenshot shows the osTicket Admin Panel interface. At the top, there's a yellow warning banner that says 'Please take a minute to delete **setup** directory (./setup/) for security reasons.' Below the banner is the osTicket logo and a welcome message for 'Aayush' with links to 'Agent Panel', 'Profile', and 'Log Out'. The navigation bar has tabs: 'Dashboard', 'Settings' (selected), 'Manage', 'Emails', and 'Agents'. Under the 'Settings' tab, there are links for 'Company', 'System' (selected), 'Tickets', 'Tasks', 'Agents', 'Users', and 'Knowledgebase'. The main content area is titled 'System Settings and Preferences — osTicket (v1.15.8)'. It contains a 'General Settings' section with various configuration options:

- Helpdesk Status:** Radio buttons for 'Online' (selected) and 'Offline'.
- Helpdesk URL:** Text input field with 'http://localhost/osTicket/' and a red asterisk.
- Helpdesk Name/Title:** Text input field with 'Aayush's Help Desk' and a red asterisk.
- Default Department:** Dropdown menu with 'Support' selected and a red asterisk.
- Force HTTPS:** Checkbox for 'Force all requests through HTTPS' (unchecked).
- Collision Avoidance Duration:** Text input field with '3' and a unit dropdown set to 'minutes'.
- Default Page Size:** Text input field with '25' and a unit dropdown.
- Default Log Level:** Dropdown menu with 'WARN' selected.
- Purge Logs:** Text input field with 'After 12 months' and a unit dropdown.
- Show Avatars:** Checkbox for 'Show Avatars on thread view' (checked).
- Enable Rich Text:** Checkbox for 'Enable html in thread entries and email correspondence' (checked).
- Allow System iFrame:** Text input field with 'eg. https://domain.tld, *.domain.tld'.
- Embedded Domain Whitelist:** Text input field with 'youtube.com, dailymotion.com, vimeo.com, player.vi'.
- ACL:** Text input field with 'eg. 192.168.1.1, 192.168.2.2, 192.168.3.3' and an 'Apply To' dropdown set to 'Disabled'.

Role Configuration

- Created role: Supreme Admin



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

Dashboard
Settings
Manage
Emails
Agents

Agents
Teams
Roles
Departments

Roles


Add New Role
More

	Name	Status	Created On	Last Updated
	All Access	Active	7/20/25	7/20/25 7:26 PM
<input type="checkbox"/>	Expanded Access	Active	7/20/25	7/20/25 7:26 PM
<input type="checkbox"/>	Limited Access	Active	7/20/25	7/20/25 7:26 PM
<input type="checkbox"/>	Supreme Admin	Active	7/20/25	7/20/25 10:59 PM
<input type="checkbox"/>	View only	Active	7/20/25	7/20/25 7:26 PM

Select: All None Toggle

- Assigned via: Admin Panel → Agents → Roles and given permission to do everythin in oSTicket.

Please take a minute to delete **setup** directory (./setup/) for security reasons.



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

Dashboard
Settings
Manage
Emails
Agents

Agents
Teams
Roles
Departments

Update Role — Supreme Admin

Definition
Permissions

Tickets
Tasks
Knowledgebase

☒ Assign — Ability to assign tickets to agents or teams
☒ Close — Ability to close tickets
☒ Create — Ability to open tickets on behalf of users
☒ Delete — Ability to delete tickets
☒ Edit — Ability to edit tickets
☒ Edit Thread — Ability to edit thread items of other agents
☒ Link — Ability to link tickets
☒ Mark as Answered — Ability to mark a ticket as Answered/Unanswered
☒ Merge — Ability to merge tickets
☒ Post Reply — Ability to post a ticket reply
☒ Refer — Ability to manage ticket referrals
☒ Release — Ability to release ticket assignment
☒ Transfer — Ability to transfer tickets between departments

Save Changes
Reset
Cancel

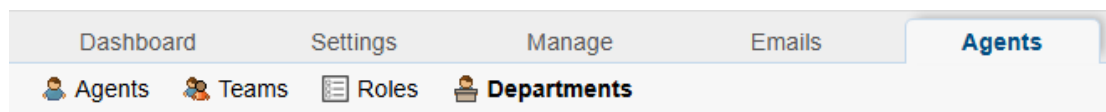
Department Configuration

- Created department: SysAdmins

Departments

	Name ▲	Status ◆	Type ◆	Agents ◆	Email Address ◆
<input type="checkbox"/>	Maintenance	Active	Public	0	Support <aayushghimire91@gmail.com>
<input type="checkbox"/>	Support (Default)	Active	Public	1	Support <aayushghimire91@gmail.com>
<input type="checkbox"/>	Support / SysAdmins	Active	Public	0	Support <aayushghimire91@gmail.com>

- Purpose: Segregate visibility between Help Desk, SysAdmins, and Networking
- Configured under: Admin Panel → Agents → Departments → Settings



Update Department — SysAdmins

Settings

Access

Department Information

Parent:

Support ▼ *

Name:

SysAdmins *

Status:

Active ▼ ?

Type:

☒ Public ☐ Private (Internal) ?

SLA:

— System Default — ▼ ?

Schedule:

— SLA's Default — ▼ ?

Manager:

— None — ▼ ?

Ticket Assignment:

All ▼ ?

Claim on Response:

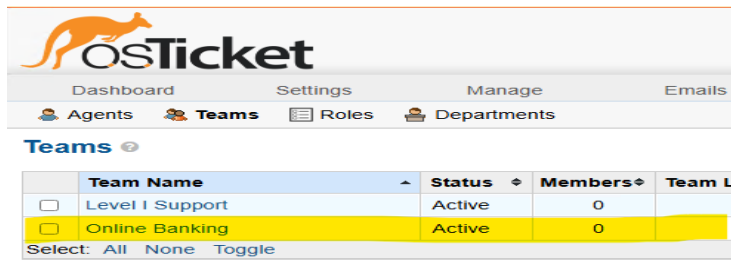
☐ Disable auto claim ?

Reopen Auto Assignment:

☐ Disable auto assign on reopen ?

Team Configuration

- Created team: Online Banking



oSTicket Admin Panel - Teams Section

Navigation: Dashboard | Settings | Manage | Emails

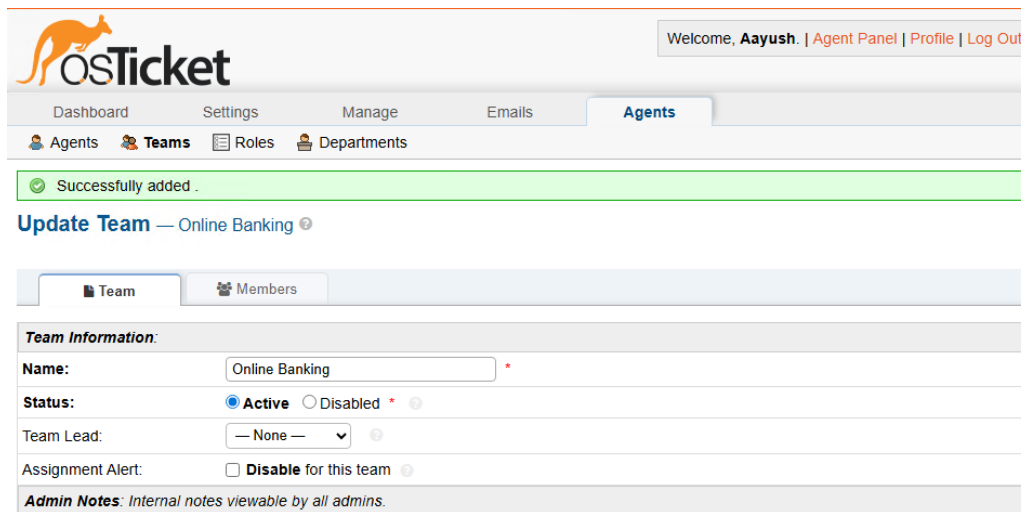
Sub-navigation: Agents | **Teams** | Roles | Departments

Teams ⓘ

	Team Name	Status	Members	Team L
<input type="checkbox"/>	Level I Support	Active	0	
<input type="checkbox"/>	Online Banking	Active	0	

Select: All None Toggle

- Added agents from multiple departments
- Managed via: Admin Panel → Agents → Teams



oSTicket Admin Panel - Update Team Form

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

Navigation: Dashboard | Settings | Manage | Emails | **Agents**

Sub-navigation: Agents | **Teams** | Roles | Departments

Successfully added .

Update Team — Online Banking ⓘ

Team | Members

Team Information:

Name:

Status: ☒ Active ☐ Disabled ⓘ

Team Lead: ⓘ

Assignment Alert: ☐ Disable for this team ⓘ

Admin Notes: Internal notes viewable by all admins.


User Access Settings

- Enabled ticket creation for unregistered users by **unchecking** the “Require registration” option
- Configured via: Admin Panel → Settings → User Settings

Agent Management

- Added new agents:
 - Jane (Department: SysAdmins)

⚠ Please take a minute to delete **setup** directory (./setup/) for security reasons.


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

[Agents](#)
[Teams](#)
[Roles](#)
[Departments](#)

— All Departments —
— All Teams —
Apply

Agents

➕ Add New Agent
⚙ More

	Name	Username	Status	Department	Created	Last Login
<input type="checkbox"/>	Aayush Ghimire	adminuser	Active	Support	7/20/25	3 minutes ago
<input type="checkbox"/>	Jane Doe	jane	Active	SysAdmins	7/20/25	never

Select: [All](#) [None](#) [Toggle](#)

Page: [1]

- John (Department: Support)

Agents

➕ Add New Agent
⚙ More

	Name	Username	Status	Department	Created	Last Login
<input type="checkbox"/>	Aayush Ghimire	adminuser	Active	Support	7/20/25	12 minutes ago
<input type="checkbox"/>	Jane Doe	jane	Active	SysAdmins	7/20/25	never
<input type="checkbox"/>	John Doe	john	Active	Support	7/20/25	never


- Configured under: Admin Panel → Agents → Add New

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

[Agents](#)
[Teams](#)
[Roles](#)
[Departments](#)

Manage Agent — John Doe

[Account](#)
[Access](#)
[Permissions](#)
[Teams](#)



Name:

Email Address:

Phone Number: Ext

Mobile Number:

Authentication


Username: ↻ Set Password

Status and Settings

☐ Locked
 ☐ Administrator
 ☐ Limit ticket access to ONLY assigned tickets
 ☐ Vacation Mode

User (Customer) Management


- Created customer accounts:
 - Karen



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[Users](#)
[Tasks](#)
[Tickets](#)
[Knowledgebase](#)

[User Directory](#)
[Organizations](#)



Name: [Karen](#)

Email: karen@gmail.com

Organization: [Add Organization](#)

Status: Guest

Created: 7/20/25 11:39 PM


Updated: 7/20/25 11:39 PM

[Register](#)
[Delete User](#)
[More](#)

[Tickets](#)
[Notes](#)

User does not have any tickets
 [+ Create New Ticket](#)


○ Ken



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[User Directory](#)
[Organizations](#)



Name: [Ken](#)

Email: ken@gmail.com

Organization: [Add Organization](#)

Status: Guest

Created: 7/20/25 11:41 PM

Updated: 7/20/25 11:41 PM

[Register](#)
[Delete User](#)
[More](#)

[Tickets](#)
[Notes](#)

User does not have any tickets
 [+ Create New Ticket](#)

- Configured via: Agent Panel → Users → Add New

Lookup or create a user

Search existing users or add a new user.

Create New User:

Email Address:

Full Name:

Phone Number: Ext:

Internal Notes:


Reset

Cancel

Add User

SLA Configuration

- Defined three service levels:
 - Sev-A: 1-hour grace, 24/7
 - Sev-B: 4-hour grace, 24/7
 - Sev-C: 8-hour grace, Business Hours



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

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

✔ Successfully added a SLA plan.

Service Level Agreements


[+ Add New SLA Plan](#) [More](#)

	Name	Status	Grace Period (hrs)	Date Added	Last Updated
<input type="checkbox"/>	Default SLA (Default)	Active	18	7/20/25	7/20/25 7:26 PM
<input type="checkbox"/>	Sev-A	Active	1	7/20/25	7/20/25 11:45 PM
<input type="checkbox"/>	Sev-B	Active	4	7/20/25	7/20/25 11:46 PM
<input type="checkbox"/>	Sev-C	Active	8	7/20/25	7/20/25 11:47 PM

Select: [All](#) [None](#) [Toggle](#)

Page: **[1]**

- Configured via: Admin Panel → Manage → SLA



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[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:

Status:

☒ Active ☐ Disabled

Grace Period:

 (in hours)

Schedule:

— System Default —

Transient:

☐ SLA can be overridden on ticket transfer or help topic change

Ticket Overdue Alerts:

☐ Disable overdue alerts notices. (Override global setting)

Internal Notes: Be liberal, they're internal

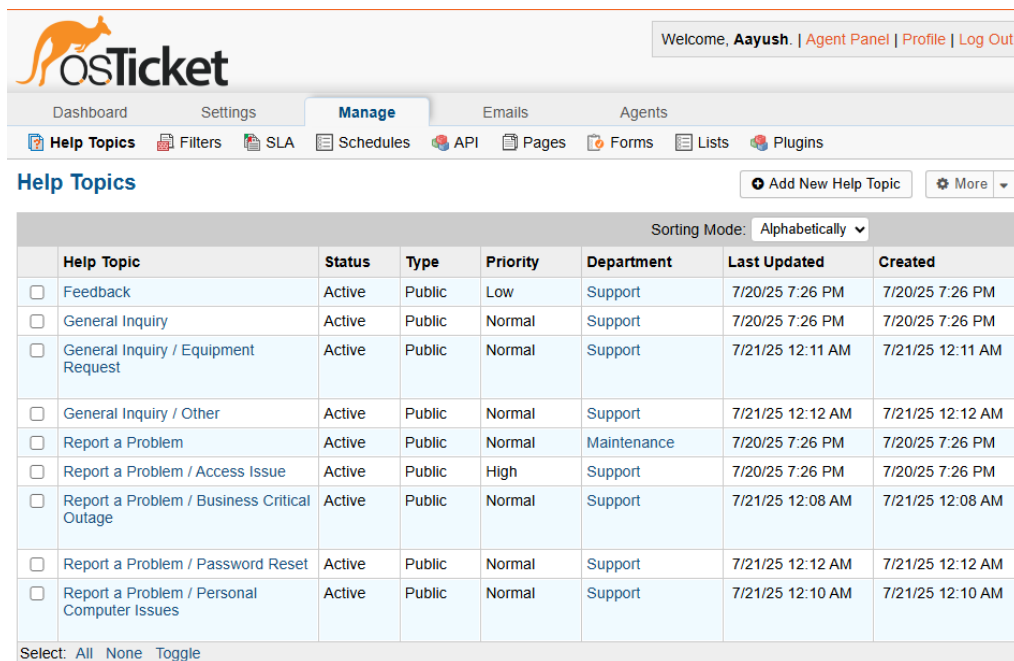
Add Plan

Reset

Cancel

Help Topics Setup

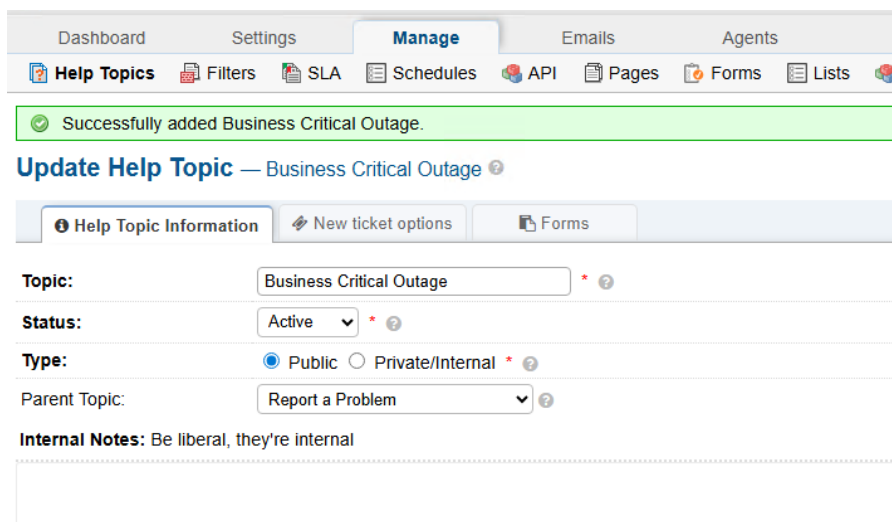
- Created categories for ticket classification:
 - Business Critical Outage
 - Personal Computer Issues
 - Equipment Request
 - Password Reset
 - Other



The screenshot shows the OSTicket Admin Panel. The top navigation bar includes 'Dashboard', 'Settings', 'Manage' (active), 'Emails', and 'Agents'. Below this is a sub-navigation bar with 'Help Topics' (active), 'Filters', 'SLA', 'Schedules', 'API', 'Pages', 'Forms', 'Lists', and 'Plugins'. The main content area is titled 'Help Topics' and features a table of help topics. The table has columns for 'Help Topic', 'Status', 'Type', 'Priority', 'Department', 'Last Updated', and 'Created'. The topics listed are: Feedback, General Inquiry, General Inquiry / Equipment Request, General Inquiry / Other, Report a Problem, Report a Problem / Access Issue, Report a Problem / Business Critical Outage, Report a Problem / Password Reset, and Report a Problem / Personal Computer Issues. A 'Sorting Mode' dropdown is set to 'Alphabetically'. At the bottom, there is a 'Select: All None Toggle' link.

	Help Topic	Status	Type	Priority	Department	Last Updated	Created
<input type="checkbox"/>	Feedback	Active	Public	Low	Support	7/20/25 7:26 PM	7/20/25 7:26 PM
<input type="checkbox"/>	General Inquiry	Active	Public	Normal	Support	7/20/25 7:26 PM	7/20/25 7:26 PM
<input type="checkbox"/>	General Inquiry / Equipment Request	Active	Public	Normal	Support	7/21/25 12:11 AM	7/21/25 12:11 AM
<input type="checkbox"/>	General Inquiry / Other	Active	Public	Normal	Support	7/21/25 12:12 AM	7/21/25 12:12 AM
<input type="checkbox"/>	Report a Problem	Active	Public	Normal	Maintenance	7/20/25 7:26 PM	7/20/25 7:26 PM
<input type="checkbox"/>	Report a Problem / Access Issue	Active	Public	High	Support	7/20/25 7:26 PM	7/20/25 7:26 PM
<input type="checkbox"/>	Report a Problem / Business Critical Outage	Active	Public	Normal	Support	7/21/25 12:08 AM	7/21/25 12:08 AM
<input type="checkbox"/>	Report a Problem / Password Reset	Active	Public	Normal	Support	7/21/25 12:12 AM	7/21/25 12:12 AM
<input type="checkbox"/>	Report a Problem / Personal Computer Issues	Active	Public	Normal	Support	7/21/25 12:10 AM	7/21/25 12:10 AM

- Configured via: Admin Panel → Manage → Help Topics



The screenshot shows the 'Update Help Topic' form for 'Business Critical Outage'. The top navigation bar is the same as the previous screenshot. Below it is a green success message: 'Successfully added Business Critical Outage.' The form title is 'Update Help Topic — Business Critical Outage'. The form has three tabs: 'Help Topic Information' (active), 'New ticket options', and 'Forms'. The 'Help Topic Information' tab contains the following fields:

- Topic:** Business Critical Outage
- Status:** Active
- Type:** Public (selected), Private/Internal
- Parent Topic:** Report a Problem

Below the form fields is a section for 'Internal Notes' with the text: 'Be liberal, they're internal'.

Skills Demonstrated

- System configuration within a web-based ticketing tool
- Role-based access and department management
- SLA design and priority classification
- End-user and agent account provisioning
- Help topic and workflow structuring for ticket intake

Challenges & Solutions

Challenge: Understanding distinction between agent and admin functionality

Solution: Mapped out interface roles and tested visibility/access to ensure correct privilege assignments

Results & Takeaways

- Successfully implemented user, role, department, and SLA configurations
- Developed a structured helpdesk environment with defined responsibilities
- Improved ticket flow, prioritization, and agent assignment