DynamicFieldITSMConfigItem

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1 Document Related Remarks

1.1 Document Information

1.1.1 Intention of this Document

This document describes specific modifications and extensions as they are part of project „DynamicFieldITSMConfigItem". It contains a short technical description as well as short advisories on how to use this extension.

1.1.2 Delimitation

This document does not claim to be a complete documentation on the administration or configuration of OTRS. For more information on these issues please check the publicly available documentaion of the OTRS-project at http://www.otrs.org. More information may be found in the forum area http://forums.otrs.org.

Changes and configuration, i.e. in SysConfig or in the file system, which have been performed manually or separately are not subject of this document either.

1.1.3 Document History

Version	Date	Changed Section	Changed By
0.1.0	2013/09/23	initial creation	Stefan Mehlig
0.2.0	2013/10/01	revision	Stefan Mehlig
0.3.0	2013/10/10	Array-Support; new: 3.4; addition 3.3	Stefan Mehlig
1.0.0	2013/11/01	revision	Stefan Mehlig
1.1.0	2013/11/07	Upgrade for OTRS 3.3.x	Stefan Mehlig
1.2.0	2014/10/22	Upgrade for OTRS 4.0.x	Anna Litvinova
1.2.1	2015/06/26	Correction of configuration description	Mario Illinger
2.0.0	2015/01/29	Upgrade for OTRS 5.0, Field types merged	Mario Illinger

1.1.4 Authors / Responsible

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1.1.5 Document Owner

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2 General Remarks and Preconditions

2.1 Used Terms

Term	Description
ACL	Restricts available actions and ticket values based on current or selected ticket values, current action or the like.
Agent / User	Editor of requests
Agent-permissions	direct assignment of permissions between agents and groups
Article	a single manual step at a ticket - incoming / outgoing call or email, note, customer feedback via the web frontend
Permissions	Permissions define what an agent can do within a group. Certain functions in OTRS require appropriate permissions.
Affected structures	Lists all relevant files and database changes to provide named function/extension.
CI	Config Item - resources for mapping business processes and service provision. In contrast to the simple "Asstemanagement" not only physical but also logical elements are listed. Furthermore the relationships between the elements represents an important part of the information.
CMDB	Configuration Management Data Base - contains information about CIs (Config Items)
Service / Duty	Can be used for a technical service, e.g. webserver. A service is the type of support that your organization provides to customers.
FAQ	Frequently Asked Questions - an extension module for OTRS, which can be used as a simple knowledge base and a simple integration into the ticket processing (similar to text modules) and provides a customer interface (browser).
Follow-Up	Corresponding message to a existing ticket.
Generic Agent	Periodic tasks based on tickets, similar to Cron Jobs or "Scheduled Tasks" in MS Windows.
Group	Core of the permission concept in OTRS. Permissions are always awarded to groups. Groups are assigned to queues, FAQ-Categories or functional areas.
Configuration options	Lists SysConfig-entries used to change the behavior of named function/extension. Changes on one's own responsibility.
Customer	Entity that is authorized to raise a support request. This is usually an organization or a subdivision of the organization such as cost centers, faculties or departments. But this can also be a real person.
Customer Data Backend	Data source for contact information in OTRS. OTRS can use up to 11 customer data backends.
Customer Company	Summarizes the data of a company and each customer contact can be assigned to a company. This eliminates the maintenance of specific data on each contact record.
Customer User	Contact or person who raises a request in the context of a customer. A customer user is always assigned to at least one customer.
OPAR	OTRS Package Archive - a public archive of free OTRS extensions. The extensions are available for free.
Queue	Category for requests - similar to directories in the file system of a computer.
Role	Defines a collection of role permissions - roles can be assigned to multiple agents.
Role-permissions	Assignment of permissions between roles and groups.

Term	Description
Service	Defines which performance is requested for a ticket in the business process.
Servicecatalog	Defines the collection of all standardized services to be provided by the service desk. This includes a description, the costs and who can make a draft oft the service.
Ticket / Request	Totality of all communication and documentation steps when processing a request. Documentation may take the form of an incoming or outgoing email or call, notes and customer feedback via web front end.
Ticket Event	Special background process caused by a ticket event, could activate other background processes.
Ticketlock	Allows a kind of locking, so that specific actions on a ticket can be performed only by the owner. To prevent multiple processing of a ticket.
Ticketstate	Defines the state of processing of the request.
Tickettype	Classifies the business process of a request.
Underpinning Contract	A service which was bought from an external service provider.

Table 1: Used Terms

2.2   OTRS-external Requirements

2.3   OTRS-internal Requirements

Packagename	Ver-sion (≥)	Vendor	Free[1]	Require ment[2]	Description
OTRS-Framework	5.0.x	OTRS AG	X	R	OTRS-Basisfunktionen
ITSMConfiguration-Management	5.0.1	OTRS AG	X	R	Provides CMDB and some standard CI-classes

Table 2: OTRS-Internal Requirements

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1   *package is available for free or provided within project or extension*
2   *R = required; S = suggested/recommended*

3 Extension DynamicFieldITSMConfigItem

3.1 Installation

The extension is delivered in the form of additional OTRS extension package. You can install and activate the extension by using the package manager.

The installation of OTRS extension packages can be performed through the graphical interface or the command line. Due to the configuration of the overall system, it might be necessary to to restart the web server after the installation.

For installation through the graphical interface navigate to "package management" in the admin area. Select the package in the corresponding input box. The button "Install Package" means the package will be installed. Depending on the package, further information can be displayed before.

3.1.1 Technical Implementation

During installation, the following tasks are performed:

- Installation of configuration, modules, language file and the layout templates.

3.1.1.1 Affected structures

- **Filelist:**
- doc/en/DynamicFieldITSMConfigItem.pdf
- doc/CHANGES_DynamicFieldITSMConfigItem.md
- Kernel/Config/Files/DynamicFieldITSMConfigItem.xml
- Kernel/Modules/AdminDynamicFieldITSMConfigItem.pm
- Kernel/Modules/DynamicFieldITSMConfigItemAJAXAutoComplete.pm
- Kernel/Output/HTML/Standard/AdminDynamicFieldITSMConfigItem.tt
- Kernel/System/DynamicField/Driver/ITSMConfigItemReference.pm
- Kernel/System/Ticket/Event/ITSMConfigItemLinkAdd.pm
- **Database:**
- -

3.2 Functional Overview

- Usage of ConfigItems of selectable classes of ITSM::ConfigItem::Class
- Usage of deposited values with static link
- Automatic creation of links between ticket and ConfigItems

3.2.1 Technical Implementation

- Creating a backend for Dynamic Fields
    - Display of values with configurable link
- Providing the configuration screen for Dynamic Fields
- Providing the AJAX handler for autocompletion
- Providing the event handler for the automatic linking
- Configuration options of the Dynamic Field: See 3.3

3.2.1.1 Affected structures

- **Filelist:**
- `Kernel/Config/Files/DynamicFieldITSMConfigItem.xml`
- `Kernel/Modules/AdminDynamicFieldITSMConfigItem.pm`
- `Kernel/Modules/DynamicFieldITSMConfigItemAJAXAutoComplete.pm`
- `Kernel/Output/HTML/Standard/AdminDynamicFieldITSMConfigItem.tt`
- `Kernel/System/DynamicField/Driver/ITSMConfigItemReference.pm`
- `Kernel/System/Ticket/Event/ITSMConfigItemLinkAdd.pm`
- **Database:**
- `-`

3.2.2 Configuration options

Keyname	Description
Frontend::Module###-AdminDynamicFieldITSMConfigItem	• Frontend module registration for the creation of the Dynamic Field
DynamicFields::Backend###-ITSMConfigItemReference	• Registration of DynamicField-Backends
Frontend::Module###-DynamicFieldITSMConfigItemAJAXAutocomplete	• Registration of AJAX-Handler for autocompletion
Customer::Frontend::Module###-DynamicFieldITSMConfigItemAJAXAutocomplete	• Registration of AJAX-Handler for autocompletion
Ticket::EventModulePost###-ITSMConfigItemLinkAdd	• Registration of Event-Handler for the automatic linking

3.3 Configuration Options DynamicField

Specific configuration entries in the agent frontend → admin area → Dynamic Fields → Modification for Dynamic Field type ITSMConfigItemReference.

3.3.1 Config item classes

Selection of relevant config item classes

3.3.2 Deployment states

Selection of relevant deployment states

3.3.3 Constrictions

Specify Constrictions for CI-search. [CI-Attribute]::[Object]::[Attribute/Value]::[Mandatory]

- CI-Attribute - Attribute key from config item definition. For sub attributes, its only the key, not the whole path
- Object
  - Configuration - Value of constriction is static, [Attribute/Value] is taken
  - Ticket - Value of constriction is taken from submitted value of the ticket attribute or from the value saved at the ticket itself
  - CustomerUser - Value of constriction is taken from the value saved in the customer user data
- Mandatory
  - 0 - If the value of the object is empty, this rule is ignored
  - 1 - If the value of the object is empty, the search is suppressed

3.3.4 Display pattern

Specify pattern used for display. Following placeholders can be used:
- <CI_Name>
- <CI_Number>
- <CI_ConfigItemID>
- <CI_Class>
- <CI_ClassID>
- <CI_VersionID>
- <CI_LastVersionID>
- <CI_DefinitionID>
- <CI_DeplState>
- <CI_DeplStateType>
- <CI_DeplStateID>
- <CI_CurDeplState>
- <CI_CurDeplStateType>
- <CI_CurDeplStateID>
- <CI_InciState>
- <CI_InciStateType>
- <CI_InciStateID>

- <CI_CurInciState>
- <CI_CurInciStateType>
- <CI_CurInciStateID>
- <CI_CreateTime>
- <CI_CreateBy>

3.3.5 MaxArraySize

Specify the maximum number of entries.

3.3.6 ItemSeparator

Specify the separator of displayed values for this field.

3.3.7 Default values

This is the default value for this field.

3.3.8 Show Agent-Link

Here you can specify an optional HTTP link for the field value in Overviews and Zoom screens.

Example: http://some.example.com/index.pl?Action=AgentITSMConfigItemZoom;ConfigItemID=<CI_ConfigItemID>

Same placeholders as for display pattern available. Addtional available: <SessionID>

3.3.9 Show Customer-Link

Here you can specify an optional HTTP link for the field value in Overviews and Zoom screens.

Example: http://some.example.com/index.pl?Action=AgentITSMConfigItemZoom;ConfigItemID=<CI_ConfigItemID>

Same placeholders as for display pattern available. Addtional available: <SessionID>

3.3.10 MinQueryLength

Minimum number of characters that must be entered for a keyword before the autocomplete is active. If the value is set to 0, the auto completion is disabled.

3.3.11 QueryDelay

Delay in milliseconds after the last keystroke before the autocomplete is active.

3.3.12 Max. Queryresult

Maximum number of proposals by the autocomplete.

4 Changed default configuration

This section lists SysConfig keys which have been changed within this extensions and which are not mentioned within other sections of this documents. Manually set configuration options are not listed.

Keyname	New Default Value
n.a.	n.a.

List of Tables