ExternalSupplierForwarding

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Table of Contents

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 „Doc-Props/Info3". 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
1.0.0	2013-03-29	all	Anna Litvinova
1.0.1	2013-10-25	properties	Stefan Mehlig
1.0.2	2014-04-04	4.2, 5.1.3	Stefan Mehlig
1.1.0	2014-08-07	complete rework	Torsten Thau
1.2.0	2015-11-27	2.3	Mario Illinger

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2 General Remarks and Preconditions

2.1 Used Terms and Abbreviations

Term	Description
CI	Config Item
CLI	Command Line Interface
GUI	Graphical User Interface
OTRS	Open Ticket Request System

Table 1: Used Terms and Abbreviations

2.2 OTRS-external Requirements

Aspect	Minumum Requirement
n.a.	n.a.

Table 2: OTRS-external Requirements

2.3 OTRS-internal Requirements

Packagename	Ver-sion (≥)	Vendor	Free[1]	Require ment[2]	Description
OTRS-Framework	5.0.1	OTRS AG	X	R	

Table 3: 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 Package Installation and Setup

You can install the package „ExternalSupplierForwarding" via the Package Management in the OTRS GUI or using the CLI package manager.

This packages provides functions to automatically forward tickets from configured "forward-queues" to external suppliers. The forwarded data can also include the data of related config items. The forwarded mail is PGP-encrypted if a key for the destination mail address can be found.

3.1.1 How to Use

The installation of OTRS-extension package can be done via the OTRS-GUI: within the package manager within the admin-area. Select the package file and install it by clicking upload. Depending on the package various information may be displayed before the actual installation.

In case you get a notice, that this package is not verified by the OTRS Group, this does not mean that this package contains malware or will affect your OTRS-installation negatively as the notice suggests.

The installation may also be done by the command line interface:

```
OTRSuser@system:/<OTRS_HOME>$ /bin/otrs.PackageManager.pl -a install -p
/path/to/ExternalSupplierForwarding-x.y.z.opm
```

Due to the configuration of your OTRS installation it may be necessary to clear the OTRS cache as well as to restart the web server:

```
OTRSuser@system:/<OTRS_HOME>$ ./bin/otrs.DeleteCache.pl
OTRSuser@system:/<OTRS_HOME>$ ./bin/otrs.RebuildConfig.pl
root@system:/$ service apache2 restart
```

After you have installed the ExternalSupplierForwarding extensions additional configuration is required to fully use the functionality of this package. First of all you have to configure the forward-queues with corresponding email addresses. Then you can change some default parameters according to your needs.

4 Functionality

4.1 Ticket Forwarding From Selected Queues

Some queues can be configured by the OTRS administrator to be the co called "forward-queues". An email-address of an external supplier should be assigned to each forward-queue. There are also some article types that are configured as relevant for external supplier forwarding (initially only "note-supplier-external" and "note-supplier-internal").

When a new ticket is created in a forward-queue or a new article of relevant type is added to a ticket in a forward-queue, the system will automatically send an email to the email address of the external supplier assigned to this particular queue and a new article with the contents of the sent email will be added to the ticket.

The forwarded mail is PGP-encrypted if a key for the destination mail address is configured.

The forwarded information (automatically generated article) consists of three sections: and is shown in the following illustration.

- **PROBLEM DESCRIPTION:** This section includes the text of the first article in case of ticket creation or the text of the added article, if case of a new article of a relevant type.

- **CUSTOMER DATA:** This section provides customer data based on customer attributes defined in Customer-Backend configuration. There is a possibility to exclude some of the attributes configured in Customer-Bachend mapping (s. Configuration section).

- **RELATED OBJECT DATA:** This section provides information about related objects (linked configuration items). It is configurable, which CI classes and CI attributes are relevant and should be included in the forwarded emails (s. Configuration section for details).
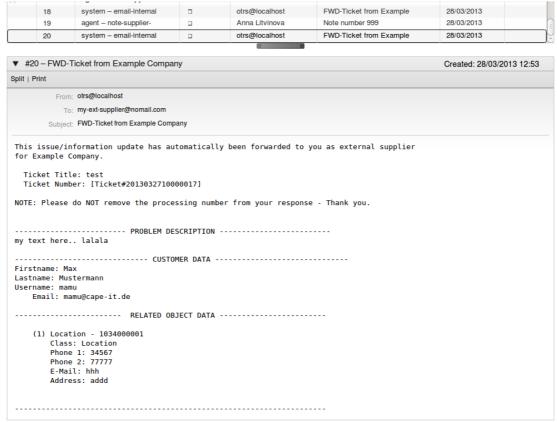
Illustration 1: Sample Content

4.2   Ticket action "Print Forward Fax"

This ticket action can be used to create/print a PDF for manual ticket forwarding.

The content of the PDF/fax contains general ticket information, ticket customer information and related object information. Besides this, it also includes configured ticket dynamic fields and the content of selected ticket articles. The fax header is built automatically. The data used in the header must be configured by the OTRS administrator.

After the package installation this ticket action is visible in tickets in all queues. The OTRS administrator can activate an ACL to show this action only in queues that are configured as forward queues or forward fax queues (s. Configuration section for details).

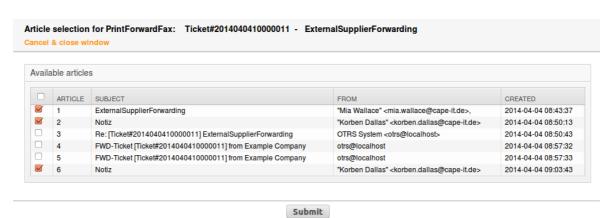**Article selection for PrintForwardFax: Ticket#2014040410000011 -   ExternalSupplierForwarding**
Cancel & close window

	ARTICLE	SUBJECT	FROM	CREATED
☑	1	ExternalSupplierForwarding	"Mia Wallace" <mia.wallace@cape-it.de>,	2014-04-04 08:43:37
☑	2	Notiz	"Korben Dallas" <korben.dallas@cape-it.de>	2014-04-04 08:50:13
☐	3	Re: [Ticket#2014040410000011] ExternalSupplierForwarding	OTRS System <otrs@localhost>	2014-04-04 08:50:43
☐	4	FWD-Ticket [Ticket#2014040410000011] from Example Company	otrs@localhost	2014-04-04 08:57:32
☐	5	FWD-Ticket [Ticket#2014040410000011] from Example Company	otrs@localhost	2014-04-04 08:57:33
☑	6	Notiz	"Korben Dallas" <korben.dallas@cape-it.de>	2014-04-04 09:03:43

Submit

Illustration 2: Selection of ticket articles included in fax/PDF

5 Configuration – SysConfig Options

The following section provides an overview of available configuration options.

5.1.1 Automatically forward tickets from forward-queue

Config Key	Description
ExternalSupplierForwarding::-ForwardQueues	Defines mapping of OTRS queues to be forwarded and corresponding email-addresses.
ExternalSupplierForwarding::-RelevantFwdArticleTypes	Defines article types which are forwarded if added to tickets in fwd-Queues.
Ticket::EventModulePost###999-ExternalSupplierForwarding	Workflow module which forwards the ticket (1st article) and related Cis.
ExternalSupplierForwarding::BCC	Defines BCC-Mailaddress for ExternalSupplierForwarding-Submissions – useful for debugging, does not provide separate encryption forr bcc-receipient.
PostMaster::PreFilterModule###-000-PGPInlineDecrypt	Module to decrypt PGP-encrypted mails before any other processing.
ExternalSupplierForwarding::-ForwardEmailPGPKeys	Defines PGP-Keys for mail addresses which are not registered in the key.

Table 4: Forward-Tickets

5.1.2 Content of the forwarded emails

Config Key	Description
ExternalSupplierForwarding::-ForwardObjectClasses	Defines the classes of linked object which are relevant to be forwarded (included).
ExternalSupplierForwarding::-CustomerUserAttrBlacklist	Defines customer user attributes which should not be shown in forwarded documents.
FwdLinkedObjectData::-OnlyCIAttributeKeys	Defines only CI-attributes for CI-Classes which are forwarded.
FwdLinkedObjectData::-ExcludedCIAttributeKeys	Defines CI-attributes for CI-Classes which are not forwarded.

Table 5: Forward-Content

5.1.3 Ticket action "Print Forward Fax"

Config Key	Description
Ticket::Frontend::MenuModule###210-PrintForwardFax	Module to show print forward fax link in menu.
Frontend::Module###AgentTicket-PrintForwardFax	Frontend module registration for the AgentTicketPrintForwardFax object in the agent interface.
ExternalSupplierForwarding::-ForwardFaxQueues	Defines mapping of OTRS queues to be fax-forwarded and corresponding fax-numbers.
ExternalSupplierForwarding::-PDFOutputTicketDynamicFields	Defines which ticket dynamic fields are forwarded.
OrganizationHotline1	Extended organization description

Config Key	Description
OrganizationHotline2	Extended organization description
OrganizationLong	Extended organization description
Ticket::Acl::Module###500-ExternalSupplierForwarding	Ticket-ACL to show/hide ticket action AgentTicketPrintForwardFax.
Ticket::Frontend::AgentTicketPrint-ForwardFax###ShownArticleAttributes	Defines which article data parameters are displayed.

Table 6: Print Forward-Fax

6 Geänderte Standardkonfigurationsschlüssel

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

List of Figures

List of Tables