
OTRS Kanban Board

User Manual

Add-on for OTRS 6

Developed by Centuran Consulting



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Installation

To install the OTRS Kanban Board add-on, you need the OPM installation file (**Centuran-OTRS-KanbanBoard-X.Y.Z.opm**) and access to the OTRS administration screen.

Follow these steps to install the add-on:

1. Log in to OTRS using an administrator account.
2. Select **Admin** from the main menu.
3. Select **Package Manager**.
4. In the **Actions** box, choose the OPM file from your disk and click **Install package**.

Note: Make sure that the configuration option to allow installation of unverified packages (**Package::AllowNotVerifiedPackages** setting) is enabled in the **System Configuration** screen. If it's disabled, switch it on.

Using the OTRS Kanban Board

To go to the Kanban Board screen, expand the **Tickets** option in the main menu and select **Kanban Board**.

You can change the way of organizing Tickets on your Board.
You have 3 views available:

- **States**

Tickets are organized in columns according to their state e.g. 'New', 'Closed successful (last 24 hours)' or any other.

Display tickets in all of user's queues ('My Queues') or tickets in a single queue.

- **Agents**

Tickets are grouped by their owner.

They are still organized in columns according to their state.

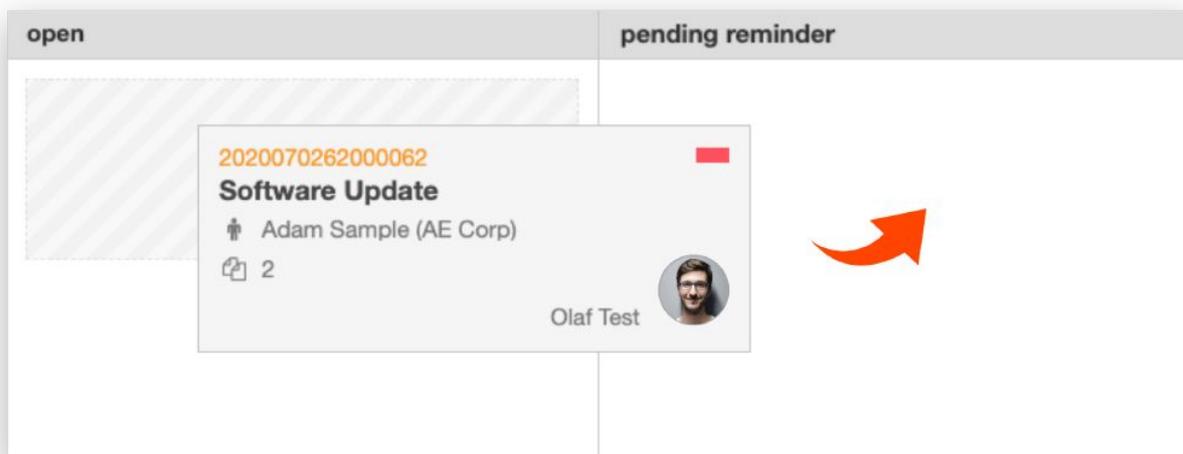
- **Queues**

Tickets are organized by their queue. In subsequent rows there are tickets marked as '1st line support', '2nd line support' or any other.

They are still organized in columns according to their state.

Tickets are displayed as cards on your Board. They are organized in columns according to their state and in rows that reflects their current owner or queue.

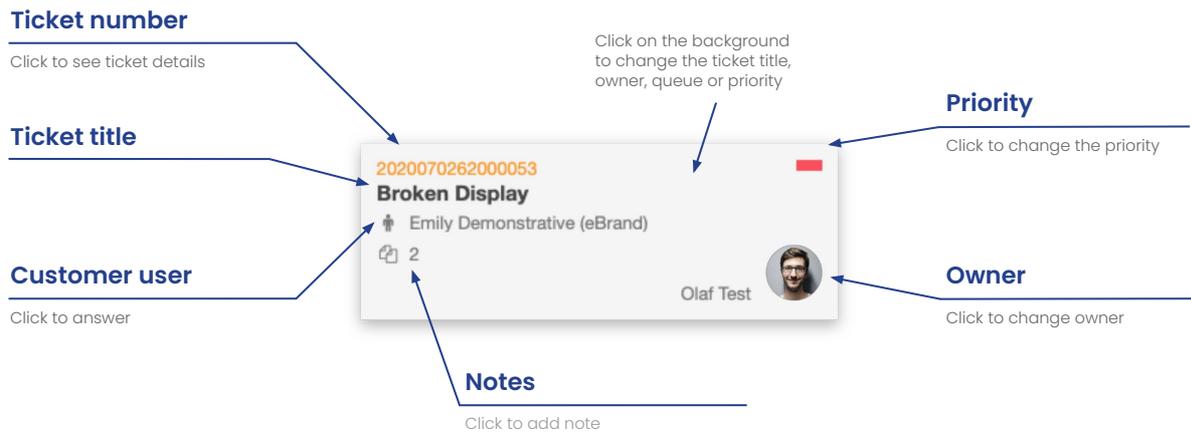
To change the ticket state simply **drag it over to a different column** on the Board. Update its owner or queue by **dragging it over to a different row**. You can drag the tickets over to a different columns and rows at the same time.



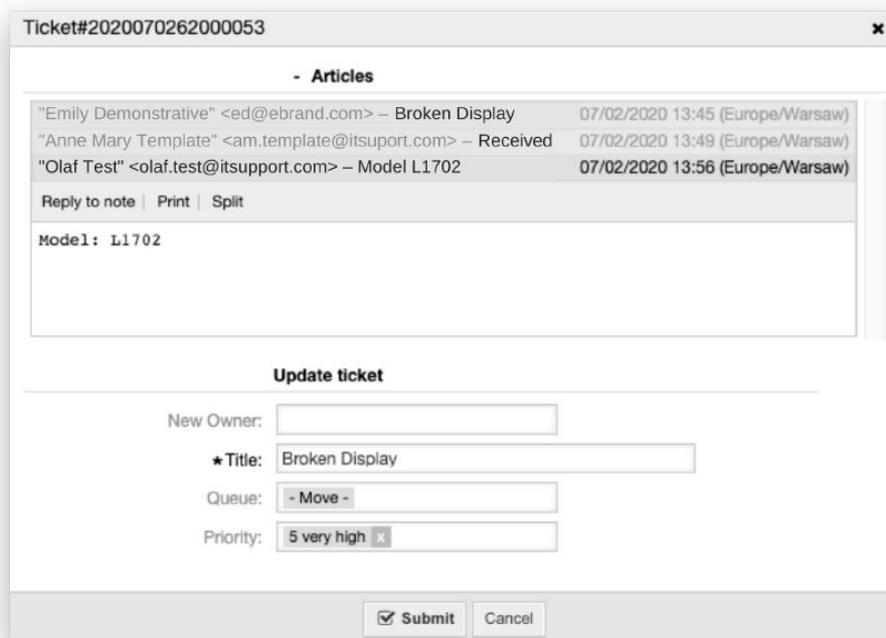
Note: Dragging a ticket to the **Pending reminder** column results in automatic setting of reminder time (due to the **Ticket::Frontend::PendingDiffTime** configuration setting value).

The ticket card contains basic information on the ticket.

By clicking on a specific piece of information, you can edit it—as shown on the image below.



Click on the card to open a quick edit popup. Here you can set new priority for the ticket, change its owner or queue, or add a new note. You can also find a complete overview of messages related to the ticket.



Configuration

The following configuration settings are available:

- **Tickets visibility**

Configuration setting: Ticket::Frontend::AgentCenturanKanbanBoard####TicketVisibility

This setting defines if tickets should be shown based on users permissions or 'My Queues' preferences.

- **Displayed ticket states**

Configuration setting: Ticket::Frontend::AgentKanbanBoard####DisplayedStates

This setting defines which ticket states are shown as columns in the Kanban Board screen (and in what order).

- **Closed tickets display time**

Configuration setting: Ticket::Frontend::AgentKanbanBoard####ClosedTicketDisplayTime

This setting defines the time (in hours) that a closed ticket should still be shown on the Kanban Board. The default value is 24.

- **Actions that respects ACL config**

Configuration setting: Ticket::Frontend::AgentCenturanKanbanBoard####ACLActions

This setting contains a list of handled actions that respect ACL config.

- **Quick edit access**

Configuration setting:

Ticket::Frontend::AgentCenturanKanbanBoardTicketEdit####Permission

This setting defines required type of permissions to edit ticket details.

- **Quick owner change**

Configuration setting: Ticket::Frontend::AgentCenturanKanbanBoardTicketEdit####Owner

This setting defines if it is possible to change the owner of the ticket in a quick edit popup.

- **Quick priority change**

Configuration setting: Ticket::Frontend::AgentCenturanKanbanBoardTicketEdit###Priority

This setting defines if it is possible to change the priority of the ticket in a quick edit popup.

- **Quick state change**

Configuration setting:

Ticket::Frontend::AgentCenturanKanbanBoardTicketEdit###StateType

This setting defines if it is possible to change the state of the ticket in a quick edit popup.

- **Quick queue change**

Configuration setting: Ticket::Frontend::AgentCenturanKanbanBoardTicketEdit###Queue

This setting defines if it is possible to change the queue of the ticket in a quick edit popup.

- **Quick title change**

Configuration setting: Ticket::Frontend::AgentCenturanKanbanBoardTicketEdit###Title

This setting defines if it is possible to change the title of the ticket in a quick edit popup.

- **Quick message overview**

Configuration setting:

Ticket::Frontend::AgentCenturanKanbanBoardTicketEdit###ArticleOverview

This setting defines if the overview of messages related to the ticket is visible in a quick edit popup. It also defines how is it displayed.

Note: Only agents with **Admin** permissions can make changes in system configuration.

Any questions? We'll be glad to help.

Call us:

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