Operating Scenarios

OTRS

OTRS is always useful whenever flexible and reliable customer communication is needed.
Why OTRS?

“OTRS is one of the most versatile communication tools on the market – its numerous configuration possibilities allow you to adapt the software exactly to your needs. OTRS additionally provides up to 50 Feature Add-ons and is designed especially for professional use in businesses. Any limits in OTRS aren’t set by the software itself, but by your creativity.”

Christopher Kuhn
COO OTRS AG
## IT Service Management
**OTRS** serves as a reliable and flexible ITSM tool

## Customer Service
**OTRS** enables better customer service

## Security Management
**OTRS** works as security management solution

## Facility Management
**OTRS** simplifies facility management with its ticket system

## Human Resources
**OTRS** manages HR tasks

## Call Centers
**OTRS** provides a flexible tool for all hotlines and call centers

## Document Management
**OTRS** structures document management workflows

## Property Management
**OTRS** provides an optimal overview for property management teams

## Fleet Management
**OTRS** stores easy-to-access asset data for smooth fleet management

## Resource Management
**OTRS** prevents resource management bottlenecks

## Procurement and Order Management
**OTRS** simplifies ordering and increases customer satisfaction

Further operating scenarios can be found on our website: [www.otrs.com/otrs-in-action/](http://www.otrs.com/otrs-in-action/)
What makes OTRS so powerful

OTRS is useful in all departments
- Development
- Finance
- Internal IT
- Marketing
- Sales
- Human Resources

OTRS is used by >170,000 companies worldwide

OTRS is available in >38 languages

OTRS Services are used by hidden champions, small-sized companies & world-famous corporations

OTRS is in action in all fields
The Versatile Software Solution OTRS

Whether...

...in IT service management...

“OTRS convinced us as an extremely efficient, stable and adaptable ticketing system. We are using the cloud version OTRS::ITSM Gold and are surprised by the reliability and speed of the software time and time again. It would be very hard to keep pace with OTRS using an in-house solution.”

Stefan Goerke, IT Infrastructure Manager at Excelitas

...as an HR management tool...

“OTRS stands out due to outstanding functionality, usability and the low costs. We could implement OTRS after a short project phase and could use it productively very quickly. The Managed Service module convinced us, because a safe operation at low fixed costs is guaranteed. With the help of the OTRS Consulting Service changes and new functionalities could be implemented very flexibly.”

Silvan Müller, Director HR Services at Feldschlösschen

...or in facility management...

“OTRS is a mature software that completely fulfills almost all of our requirements. In addition, the high-quality service provided by the OTRS Group has saved us a lot of time and resources.”

Markus Tratz, Project Director at MAN

...OTRS convinced!
OTRS serves as a reliable and flexible ITSM tool

Whether it is for internal or external IT service management, you will need an IT software that collects all IT service requests in one single system – transparently and accessibly for all IT staff members – and thus makes the replies a lot easier and clearer. If required, this software should also be able to conform to ITIL defined processes, such as Service Asset & Configuration Management, Knowledge Management, and Change Management. As an IT service management software OTRS meets both requirements in the most flexible way, without creating unnecessary complexity or limitations of any kind. Thanks to the OTRS Process Management system, you can design IT processes corresponding to ITIL® V3, implement them step-by-step in your organization, and adapt them whenever necessary to your evolving needs – without having to change the software dramatically.

Key Facts:
- Clear and efficient Incident Management and Request Fulfillment Management – With the OTRS Agent Interface and the Customer Chat feature.
- All eyes on the customer – With the OTRS Customer Portal and the OTRS Customer Information Center.
- Extensive integration possibilities with inventory or system monitoring software as well as other systems – With the OTRS Generic Interface.
- Get changes done clearly and effectively – With the OTRS Change Management feature.
- Flawless and coherent Service Asset and Configuration Management – With the OTRS CMDB feature.
- Dynamic and integrated Knowledge Management – With the OTRS FAQ feature.
- Multifaceted Service Level Management and advanced Access Management.

Popular Features for IT Service Management:

Categories for Text Modules
Always have a reply prepared: Recurrent requests can be answered even more quickly by creating template categories.

State Preselection Based on Response Templates
Sets the ticket state automatically by sending a specific response template.

Ticket Forms
Respond to customer requests easily and flexibly with ticket masks and forms.

Advanced Escalations
Create and define custom escalation types and bundles for different customers or SLAs.

CI in Customer Frontend
Uses the attributes of the Configuration Item (CI) classes and makes CIs visible in the OTRS Customer Portal.
OTRS enables better customer service

In a market where competition grows fiercer every day and where the actual differences in services from competing providers are often negligible, satisfied end customers whose needs are met in record time can be the defining feature that sets you apart from the crowd. The ideal customer service software has to be easy to use and access by the end customer, as well as efficient and resource-saving for you and your employees. **OTRS** as your customer service software meets all of these challenges and can be adapted seamlessly to your work processes. In addition, the lack of licensing costs and the fact that with our cloud-based version you don’t need internal IT know-how or services allows you to significantly reduce costs without compromising quality.

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**Popular Features for Customer Service:**

**Service Categories**
Allows one to assign services to specific ticket types.

**State Preselection Based on Response Templates**
Sets the ticket state automatically by sending a specific response template.

**Ticket Workflow**
Enables the creation of workflows to route tickets through a series of departments.

**Advanced Escalations**
Create and define custom escalation types and bundles for different customers or SLAs.

**CI in Customer Frontend**
Uses the attributes of the Configuration Item (CI) classes and makes CIs visible in the OTRS Customer Portal.

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**Key Facts:**

- Reduce follow-up calls and create a coherent structure for customer inquiries – With the OTRS Customer Self Service Portal.
- Customer self-help – With the OTRS Information Database.
- Multiple contact possibilities via chat, SMS, telephone and email.
- Multifaceted integration with third-party applications – With the OTRS Generic Interface.
- A clear and transparent overview of incoming customer inquiries – With the OTRS Agent Interface.
- Deal with customer inquiries quickly – With response templates, automation and workflows.
- Individually-adjustable product databases and optimal adherence to service times – With OTRS CMDB and Service Level Management.
Security Management

**OTRS works as security management solution**

OTRS offers a wide range of tools for optimally implementing your security strategies and meeting the requirements of the German security regulations.

Although OTRS is first and foremost a multifaceted communication and process management tool, it will surprise you to find out how many other functions it offers and how they can help you perfectly manage your daily business and IT security.

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**Key Facts:**

- Completely encrypted communication processes.
- Guaranteed authentication with PGP & S/MIME.
- Clear processes enable quick and precise incident management.
- Proactive communication thanks to automatic notifications.
- Monitor different processes at a glance.
- Access information, CVE numbers or WHOIS queries of external websites in a well-scaled preview window via mouse-over – With the OTRS Information Floater.
- Select the most important attributes to classify linked tickets and add them to the selection list. For faster access to key information with the OTRS Link Layer Column feature.

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**Popular Features for Security Management:**

**Multiple Recipient Encryption**
Enables dispatching an encrypted email to more than one recipient at the same time.

**Advanced Editor**
Allows the insertion of Template Toolkit code snippets in templates for OTRS.

**Ticket Watchlist**
Allows one to manage several ticket watchlists.

**Dashboard News Widget**
Informs agents about events, new innovations and business-related special offers.

**Hide/Show Dynamic Fields**
Define which dynamic fields should be shown or hidden in which ticket masks.
OTRS simplifies facility management with its ticket system

A field as diverse as facility management needs flexible and extendable software to support different actions and workflows. However, transparent and efficient communication with customers in the event of malfunction reports, maintenance work, fleet and key management remains an important pivotal point. OTRS as a facility management ticket system offers a range of functionalities to structure tasks more effectively and support them with intelligent automation, increasing the quality of your services.

Popular Features for Facility Management:

**Customer-specific Services**
Assigns services to customer IDs and customer users.

**Time Accounting Quota**
Assigns time quotas and billing numbers to customers and shows the current status of the quotas in a dashboard widget.

**Ticket Forms**
Respond to customer requests easily and flexibly with ticket masks and forms.

**Ticket Allocation**
Allocates tickets automatically to agents that have the resources or suitable competencies.

**Dashboard News Widget**
Informs agents about events, new innovations and business-related special offers.

Key Facts:

- Always on top of every customer and maintenance request with the OTRS Calendar.
- Lamps, doors and heaters as CIs in the OTRS Configuration Management Database (CMDB).
- Enable mobile workers with Chat, Responsive Design and SMS Notification System.
- Transparent and audit-proof documentation of communication with colleagues, customers and external service providers.
- Excellent customer service with customer databases, surveys and time quota accounting.
- Add new services and their corresponding SLAs anytime.
- Maintenance made easy with OTRS Change Management and Ticket Workflows.
- Integration with external systems such as CAD or SAP.
OTRS manages HR tasks

Today's HR departments see themselves as service providers for their company's management and teams. Additionally, the expertise and services of any HR department are crucial even before employees join the company, namely during the recruiting of new employees and the onboarding process. In this sense, transparent internal and external communication, together with perfect documentation and audit-proof storage, are fundamental. Popular HR management tools tend to be insufficiently service-oriented and are expensive. OTRS helps HR departments professionalize their applicant management process effectively and at a much lower cost, providing continual support in all areas of employee management, such as the handling of sick notes and requests for leave.

Key Facts:

Applicant management with OTRS

- Fast and professional: Respond with individually-designed response templates.
- Ticket Timeline View: The perfect overview of the applicant communication process.
- The queue as a shared department inbox.
- Pre-designed onboarding process for new employees.
- Real-time statistics on incoming applications and remaining days off.

Employee management with OTRS

- Be interactively available for your employees via chat with audio-video functionality.
- Process templates for managing sick notes.

Always be up-to-date on all important appointments like birthdays, company anniversaries, notice periods, etc. with the OTRS Calendar.

Popular Features for Human Resources:

- Escalation Suspend
  Allows one to set ticket states that automatically pause escalations (SLAs).

- Restrict Customer Data View
  Makes defined access possible with the assignment of customer IDs to partner IDs.

- Tag Cloud
  Gives a quick overview of the ‘Tags’ used for tickets.

- Ticket Watchlist
  Allows one to manage several ticket watchlists.
Call Centers

OTRS provides a flexible tool for all hotlines and call centers

Call centers are under constant pressure to deliver fast and professional customer support to a high number of customers every day. Incoming customer requests need to be answered as quickly as possible, and the staff should be able to operate at full capacity without being overburdened. This can be achieved in a budget-friendly way by using OTRS customer service software. OTRS supports you with many additional freely-selectable features to improve the quality of your customer service and reduce your costs immediately.

Popular Features for Call Centers:

**Customer-specific Services**
Assigns services to customer IDs and customer users.

**VIP Customer Users**
Defines specific customer users as “VIP” and assigns corresponding service level agreements.

**Customer Activity Widget**
Shows the number of open, locked and escalated tickets related to defined customers.

**Dynamic Sender Addresses**
Enables the insertion of a sender email address other than the default.

**Service Categories**
Assign ticket types to services via an additional frontend.

Key Facts:

- Transparent and central processing of customer enquiries individually or in a team.
- Fast and interactive customer service – With the *customer chat* feature with audio-video functionality.
- Help your service agents operate at full capacity – With the *Ticket Allocation* feature.
- Manage customers’ time quotas and billing effectively – With the *Time Accounting Quota*.
- Versatile CTI integration via MobyDick OTRS Connector or *OTRS Generic Interface*.
- All eyes on the customer – With the *OTRS Customer Information Center*, the *Customer Activity Widget* and *Dynamic Sender Addresses*.
- Always have an overview and meet strict SLAs, no matter how many services.
Document Management

OTRS structures document management workflows

Ever increasing volumes of data require that companies find efficient solutions for processing, coordinating, releasing and documenting information. Much more important, however, than the document management itself are the workflows connected with it. Be it law firms, government offices, insurance companies or the marketing and sales departments of any company, they all require a high degree of transparency in the coordination and approval of documents, as well as a system for collecting and storing data that is audit-proof and clearly understandable. OTRS, used as document workflow management software, makes it possible to organize these processes in perfect harmony and can be tuned to exactly meet your needs.

Key Facts:
- Structure data input and distribution 24/7 – With the OTRS Customer Portal.
- Audit-proof and transparent communication and version control when approving, modifying and processing documents.
- A comprehensive overview of all documents, processes and tickets with Article Attachment Overview and OTRS Dashboard.
- Clearly defined responsibilities with the owner and responsibility function and comprehensive permissions management.
- Never miss a deadline again with OTRS Service Level Management and the Pending Reminder function.
- Structured storage of documents and data in different versions in the OTRS CMDB.

Popular Features for Document Management:

Restrict Customer Data View
Makes defined access possible with the assignment of customer IDs to partner IDs.

Ticket Forms
Respond to customer requests easily and flexibly with ticket masks and forms.

Advanced Escalations
Create and define custom escalation types and bundles for different customers or SLAs.

Ticket Workflow
Enables the creation of workflows to route tickets through a series of departments.
OTRS provides an optimal overview for property management teams

Many requests from different customers have to be coordinated and processed. When tackling these tasks, you have to deal with tenants, landlords, service providers and suppliers. It is therefore important to quickly identify whether an inquiry is already being processed and who is responsible for it. It is equally important that you use the right tools to ensure that recurring tasks are not forgotten. OTRS makes both possible. With the help of a housing database, all important information about the respective tenants and responsible caretakers is captured. This makes it easy to determine who must take on the task and what the task’s status is. Additionally, for HOA meetings and the like, OTRS can be helpful. Tickets about each meeting topic are defined and can be assigned via the appointment calender so that nothing important is ever forgotten. And, with ticket splitting, all involved parties are quickly notified about the topic.

**Popular Features for Property Management:**

**Dynamic Field Database**
Integrate data from any number of external databases and have it displayed in dynamic fields.

**Appointment Calendar**
Use your own calendar to maintain appointments, assignments, tasks, etc.

**Automated Start of Processes**
Create process tickets that run on a schedule to help your agents, and even your customers, stop worrying about future tasks.

**Ticket Forms**
Respond to customer requests easily and flexibly with ticket masks and forms.

**Key Facts:**

- Efficiently coordinate a large number of inquiries and customers through communication templates, request assignments and ticket histories.
- Always know the current processing status of a request.
- Plan recurring tasks in advance and implement them on a schedule that takes advantage of notifications.
- React quickly and limit damage by thoroughly documenting action steps and automating processes.
- Always remember important topics and immediately assign them to the right event with the appointment calendar.
- Always available overview of all buildings, apartments and assets with the help of highly flexible asset management.
OTRS stores easy-to-access asset data for smooth fleet management

Cars, ships and bicycles should always be available, running smoothly and operating at the lowest possible cost. This can be a real challenge that requires balancing insurance issues, accident reports, repairs and budgets. The use of a CMDB, along with constantly updated configuration items (CIs), is helpful for this. In OTRS, for instance, the CIs can be assigned different statuses, such as “active” or “inactive.” Insurance policies and other details can be attached to tickets for easy reference. In OTRS, accident reports can be displayed. The correct departments are then informed that a car needs to be repaired and what has happened because all information can be added at once. And, of course, the administration of a vehicle fleet always includes the documentation of expenses.

Key Facts:

- All relevant assets from the database available at a glance.
- Use the appointment calendar to assign maintenance dates to CIs so upkeep is never forgotten again.
- Effort estimates are documented for simple and quick cost calculations.
- Get an overview of vehicle availability.
- Ongoing repairs and workshop orders can be viewed at a glance.
- Comprehensive reporting on received damage reports (telephone, email or external service provider).
- Simple search for invoices, insurance policies, license plates and other documents.

Popular Features for Fleet Management:

**Generic Interface**

Communicate with nearly all components of OTRS via the Generic Interface (web service interface framework), via SOAP, REST, SQL or even proprietary protocols.

**Appointment Calendar**

Use your own calendar to maintain appointments, assignments, tasks, etc.

**Service Categories**

Assign ticket types to services via an additional frontend.

**Advanced Escalations**

Create and define custom escalation types and bundles for different customers or SLAs.
OTRS prevents resource management bottlenecks

Often complications arise as a result of resource planning, regardless of which department you’re working in. Misunderstandings, incorrect scheduling, too many inquiries or inaccurate time estimates quickly lead to chaos. To avoid this, the right digital structures are needed. With OTRS, you can manage resources efficiently. For instance, personnel with specific skill sets can be quickly deployed when needed. And, by configuring a ticket appropriately, OTRS can automatically create a calendar entry.

With the help of the OTRS Resource Calendar, all employees can be entered and then assigned to the correct appointments. Bottlenecks and capacity, as well as team member competencies, become visible at a glance.

**Poplar Features for Resource Management:**

**Appointment Calendar**
Use your own calendar to maintain appointments, assignments, tasks, etc.

**Resource Planning**
Meetings, appointments and simple project planning are centrally available for the entire department in OTRS.

**Customer Event Ticket Calendar**
This allows appointments to appear in the customer interface in such a way that customers can easily see information about availability or the date of a WebEx meeting.

**Ticket Allocation**
Automatically distribute new incoming tickets to the employees who currently have capacity or the corresponding competencies.

**Key Facts:**

- **Resource planning** provides a detailed overview of the entire team’s operations, even across departments.
- **Visualize all responsibilities** and the time scheduled for the respective tasks.
- **In the Appointment Calendar**, projects or subtasks (tickets) are linked with calendar entries and all appointments are visible at a glance.
- The **customer** can view his **appointments** in the **customer portal** at any time.
- Subtasks are **automatically assigned** to the appropriate employees based on competencies and availability.
OTRS simplifies ordering and increases customer satisfaction

Faulty, late or even missing deliveries often result in having angry customers – and nobody wants that. Smooth operations require structure and clear processes. OTRS starts with the order, making the status easily visible within the ticket. It facilitates the coordination of an order and enables visualization of the planned delivery date in the calendar - including a reminder - so that the delivery takes place on time and at the right place. Orders often go through several approval steps, which can be easily mapped in OTRS too. The efficient processing of returns also contributes to customer satisfaction. In addition, important information about the quality of the goods can be obtained. This is because Dynamic Field Web Services displays all of a customer’s orders and their corresponding returns, including the reasons.

**Key Facts:**

- Search and filter customer data quickly and easily with the Dynamic Field Database.
- Easier and faster complaint management through Dynamic Field Web Service – even pulling data from third-party systems.
- Scheduling is made easy thanks to the appointment calendar.
- With definable maximum response times, ensure that prompt feedback and information flow to the client is guaranteed.
- Order management can be standardized and automated with Process Management.
- Inventories can be called up at any time via asset management.
- Statistics, reports and surveys help you to constantly increase customer satisfaction.
- Invoices and other documents can be stored and searched in a revision-proof manner.

**Popular Features for Procurement and Order Management:**

**Dynamic Field Database**
Integrate data from any number of external databases and have it displayed in dynamic fields.

**Dynamic Field Web Service**
With the help of this dynamic field, data from third-party systems can be displayed without custom development.

**Ticket Forms**
Respond to customer requests easily and flexibly with ticket masks and forms.

**Appointment Calendar**
Use your own calendar to maintain appointments, assignments, tasks, etc.