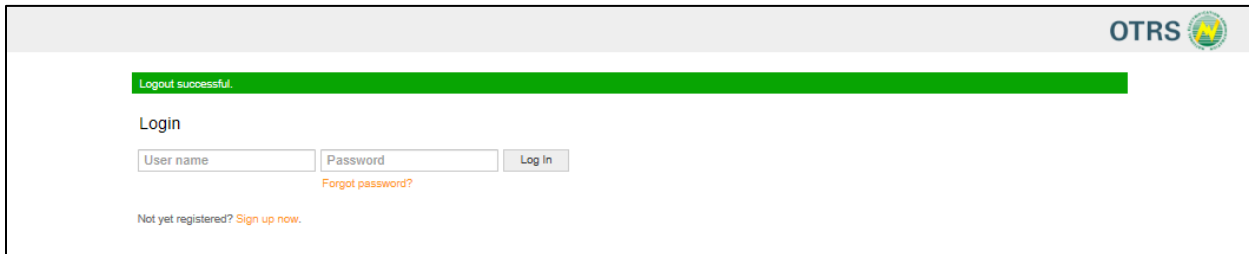


## Instructions on How to Create a Ticket in OTRS

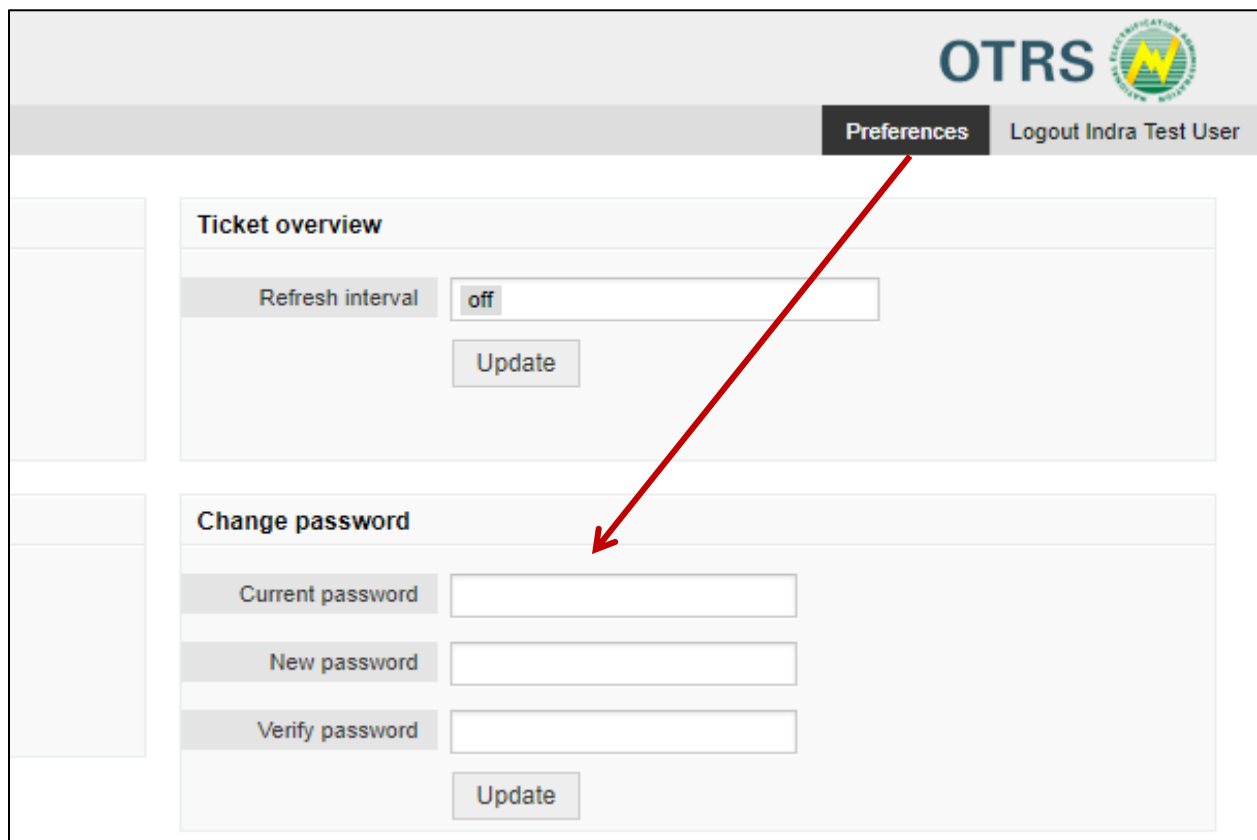
1. Type **OTRS** address (<http://neotrs.indracompany.com.ph/otrs/customer.pl>) on your Chrome Browser. **OTRS Log in page** will be displayed.



The screenshot shows the OTRS login page. At the top right, there is the OTRS logo and a circular icon. Below the logo, a green bar displays the message "Logout successful.". Underneath, the word "Login" is centered. There are two input fields: "User name" and "Password", followed by a "Log in" button. A link for "Forgot password?" is located below the password field. At the bottom left, there is a link for "Not yet registered? Sign up now."

Figure 1.1 OTRS Log-in Page

2. Enter the **OTRS username** and **password** emailed to you. Click **Log-in**. Change your initial password in the **Preferences** tab to ensure the security of your account.



The screenshot shows the OTRS Preferences page. At the top right, there is the OTRS logo and a circular icon. Below the logo, the word "Preferences" is highlighted in a dark box, and "Logout Indra Test User" is visible. The main content area is divided into two sections: "Ticket overview" and "Change password". The "Ticket overview" section has a "Refresh interval" dropdown menu set to "off" and an "Update" button. The "Change password" section has three input fields: "Current password", "New password", and "Verify password", followed by an "Update" button. A red arrow points from the "Preferences" tab to the "Change password" section.

Figure 2.1 OTRS Change Password Form

## Instructions on How to Create a Ticket in OTRS

3. On the OTRS Welcome page, click **Create your first ticket**. A ticket serves as your report of the incident/request. This will be received and monitored by NEA BIT Helpdesk.



Figure 3.1 OTRS Welcome Page

4. Fill out the **OTRS incident/ request form**. Click **Submit**. Below are field descriptions to guide you in filling-out the form.

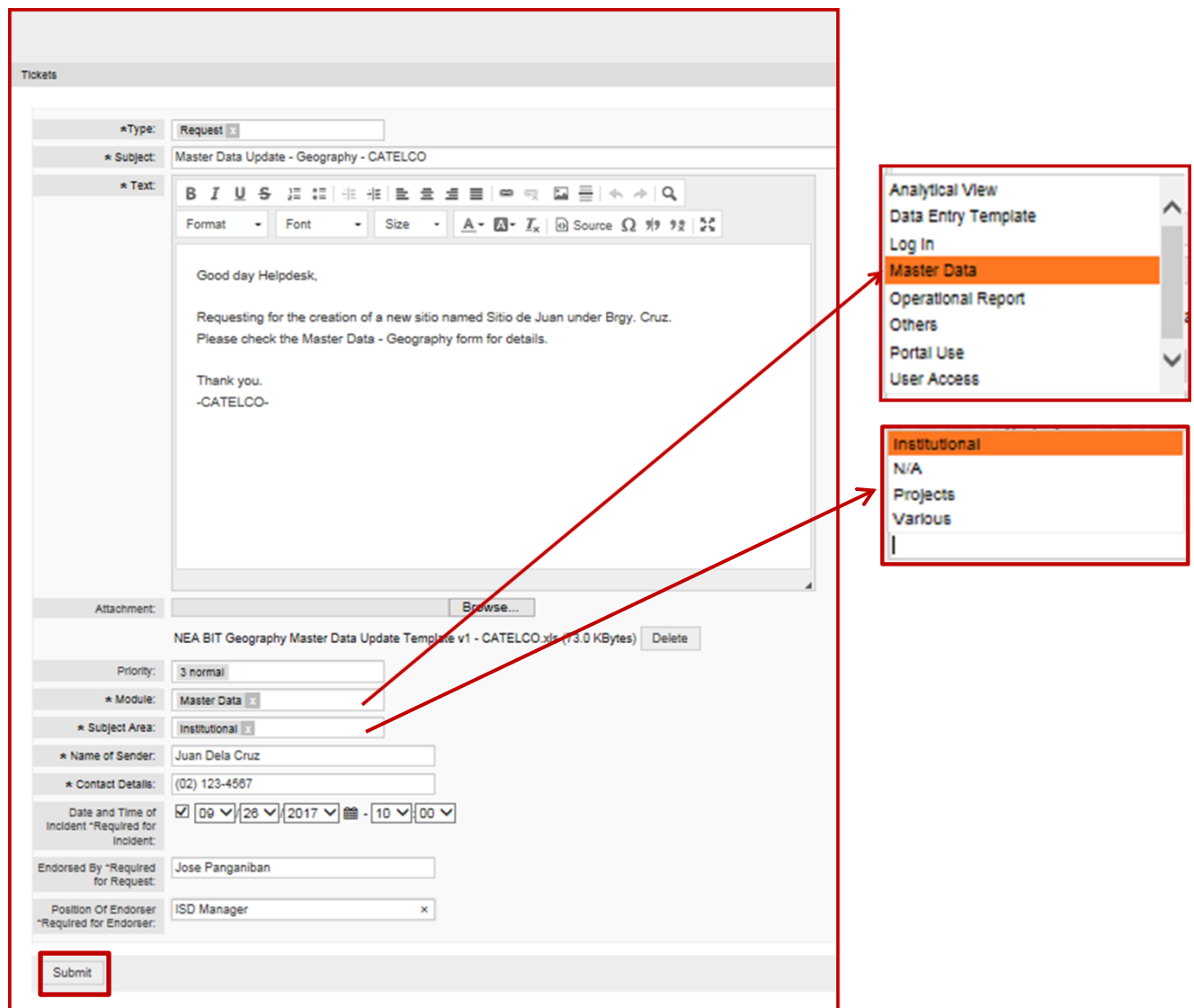


Figure 4.1 OTRS Incident / Request Form

## Instructions on How to Create a Ticket in OTRS

- **Type** – Select Incident or Request
  - Select **Incident** for system/process related issues
  - Select **Request** for Master Data Requests
- **Subject** – Enter request / incident subject in the prescribed format to describe your concern.  
*Prescribed Format: Request Type - Sub-Request Type – EC*  
Ex:  
User Access – CATELCO  
Master data request – BOD – CATELCO  
Refer to the Request Type Matrix below for the Ticket **Subject** and **Module** fields.  
:  
• **Text** – Describe your concerns with complete details of the request / issue encountered.  
Include the following:
  - What do you want to do in the system?
  - What is the issue encountered?
  - What are the steps performed before you encountered the issue?

Details are needed for faster investigation

Ex:

- I was trying to upload the BOD DET.
- I encountered the error “Error in uploading the file TracelD: XXXXXXXX
- I selected the Template Name = BOD, Reporting Month = July, Reporting Year = 2017, Reason for Late Submission = Others; then I clicked on “Submit Date Entry.” The error message appeared.

- **Priority** – Default priority level is 3. Helpdesk will reassess the priority of your request and modify as necessary.
- **Module** – Select from the following:
  - **Analytical View** – for issues encountered in the Reports Portal
  - **Data Entry Template** – for issues related to Data Entry Templates
  - **Log In** – for log-in related issues
  - **Master Data** – for BOD and Geography Master Data Requests
  - **Portal Use** – for issues encountered while using the NEA BIT Web Portal
  - **User Access** – for user access requests
  - **Others** – for requests/issues that do not fall under any of the categories mentioned.
- **Subject Area** - Select from the following:
  - **Institutional**
  - **Projects**
  - **Various**
  - **N/A**

## Instructions on How to Create a Ticket in OTRS

- **Name of Sender** – Enter your full name.
- **Contact Details** – Enter your contact number.
- **Date & Time of Incident** – Fill out this field only if Type of Ticket is Incident. Enter the date and time when you encountered the incident.
- **Endorsed By and Position of Endorser** – Fill out this field only if Type of Ticket is Incident. Enter name and position of the person who is endorsing the request.

## Instructions on How to Create a Ticket in OTRS

CONCERN	TICKET TYPE	TICKET SUBJECT		TICKET MODULE	ATTACHMENT REQUIRED
		REQUEST TYPE	SUB-REQUEST TYPE		
1. For Web Portal Access requests	Request	User Access	-	User Access	<ul style="list-style-type: none"> <li>• User Access Request Form</li> <li>• Endorsement from the GM or OIC of the GM</li> </ul>
2. For requests to add / update BOD or Geography Master data	Request	Master Data	Type of Master data: <ul style="list-style-type: none"> <li>• BOD</li> <li>• Geography</li> </ul>	Master Data	<ul style="list-style-type: none"> <li>• BOD Master data / GEO ID Master data Request Form</li> </ul>
3. For DET update requests (e.g. additional Funding Source for DET039 – SEP BLEP)	Request	Request	DET Update	Name of DET, Examples: <ul style="list-style-type: none"> <li>- SEP BLEP</li> <li>- Meetings and Resolution</li> <li>- List of Employees</li> <li>- MSEAC</li> </ul>	<ul style="list-style-type: none"> <li>• Data Entry Template</li> </ul>
4. For GEO ID File download error	Incident	Geography Download	-	Others	<ul style="list-style-type: none"> <li>• Screenshot</li> </ul>
5. For issues encountered while filling out DETs	Incident	Data Entry Template	Name of DET, Examples: <ul style="list-style-type: none"> <li>• Meetings and Resolution</li> <li>• List of Employees</li> <li>• MSEAC</li> </ul>	Data Entry Template	<ul style="list-style-type: none"> <li>• Sample DETs</li> <li>• Screenshot</li> </ul>
6. For issues encountered while using the Web Portal, sample: error in uploading/validating	Incident	Portal Use	-	Portal Use	<ul style="list-style-type: none"> <li>• DET you are uploading</li> <li>• Screenshot</li> </ul>
7. For computer/ internet concerns, sample: Web Portal pages take a long time to load	Incident	Computer/ Internet Issue	-	Others	<ul style="list-style-type: none"> <li>• Screenshot</li> </ul>

*Figure 4.1 Request Type Matrix*

## Instructions on How to Create a Ticket in OTRS



A **TICKET NUMBER** will be provided once the request or incident is successfully submitted in OTRS. Take note of the ticket number as you will use this to track the progress of your request or incident.

5. Proactively monitor the status of your request on the **OTRS dashboard**. It contains the status of your ticket/s.

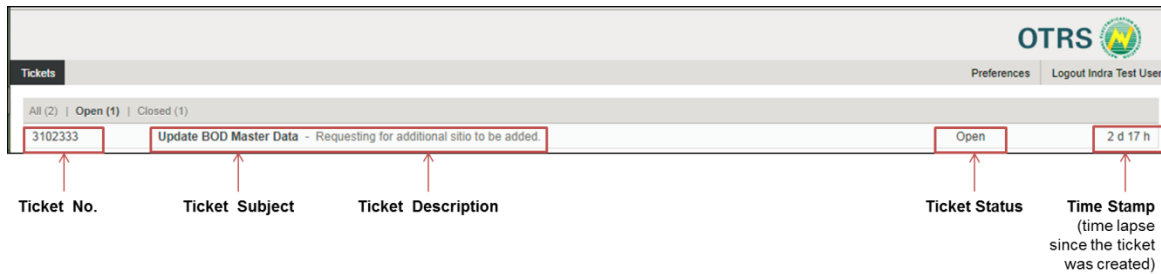


Figure 5.1 OTRS Dashboard

6. An email notification is also sent every time the status of a ticket changes. If the status of the request is “**Waiting for Customer Response: <Ticket Subject>**”, this means additional information is needed for resolution of the ticket. See step 7 for the procedure on how you can update your ticket.

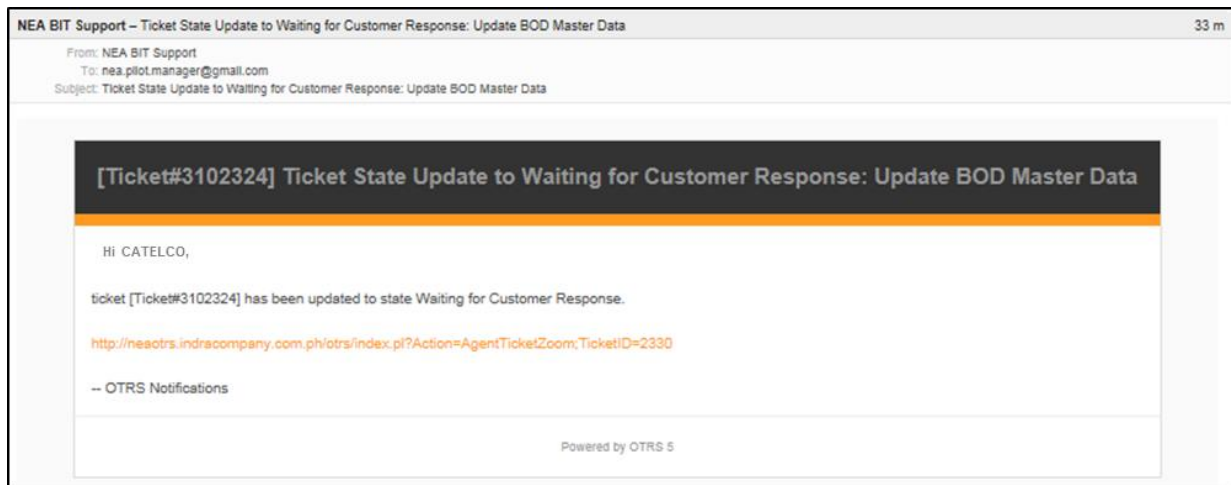


Figure 6.1 Sample email notification for ticket with status “Waiting for Customer Response”

## Instructions on How to Create a Ticket in OTRS

7. Follow the steps below to update your ticket.

7.1. Click on the ticket on the dashboard to view the details of your ticket and click **Reply**. The **OTRS Incident/ Request form** will be displayed.



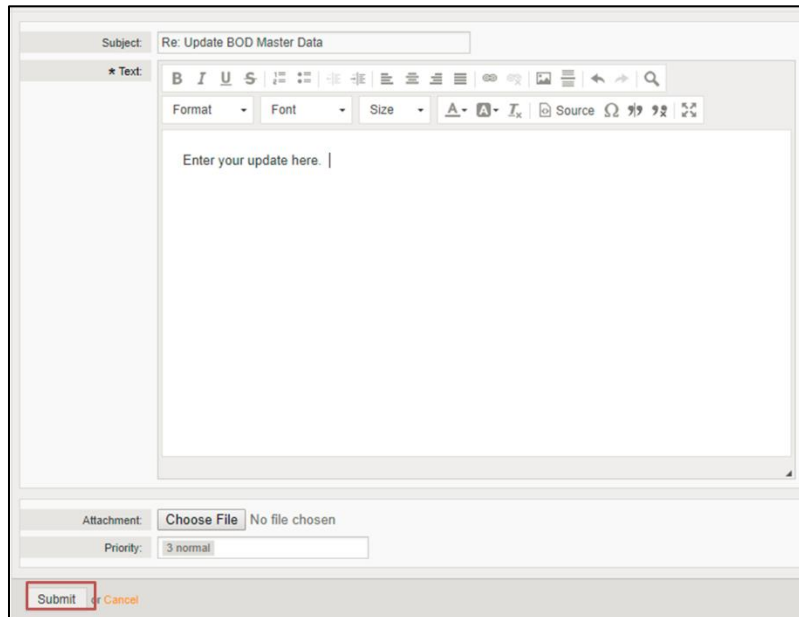
Figure 7.1.1 OTRS Dashboard



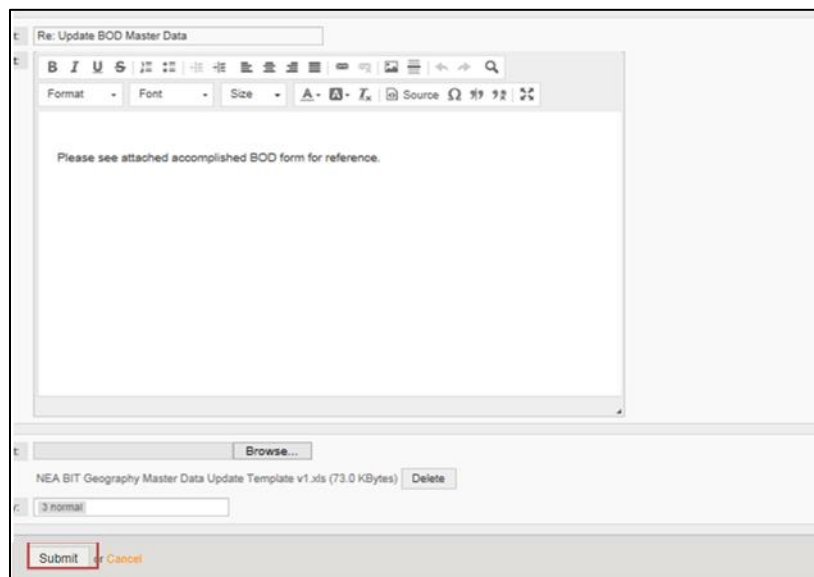
Figure 7.1.2 OTRS Ticket Details

## Instructions on How to Create a Ticket in OTRS

7.2. Fill out the form with the required information and click **Submit**. See sample below.



The screenshot shows the OTRS ticket update form. The subject is "Re: Update BOD Master Data". The text area contains the placeholder text "Enter your update here. |". The form includes a rich text editor toolbar with options for Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Source, and other formatting options. Below the text area, there is an "Attachment" section with a "Choose File" button and "No file chosen" text. The "Priority" is set to "3 normal". At the bottom, there are "Submit" and "Cancel" buttons, with "Submit" highlighted by a red box.



The screenshot shows the OTRS ticket update form after an update. The subject is "Re: Update BOD Master Data". The text area contains the text "Please see attached accomplished BOD form for reference." Below the text area, there is a "Browse..." button. Below that, there is a file attachment section showing "NEA BIT Geography Master Data Update Template v1.xls (73.0 KBytes)" with a "Delete" button. The "Priority" is set to "3 normal". At the bottom, there are "Submit" and "Cancel" buttons, with "Submit" highlighted by a red box.

Figure 7.2.1 OTRS Incident/Request Update Form

7.3. After you have updated the ticket, its status will be changed to **Assigned**.

7.4. NEA BIT Helpdesk will review the update and once confirmed that all required information are complete, the ticket will be assigned to the responsible team.

7.5. The responsible team will then start working on your request. Status of the ticket will be changed from **Assigned** to **In Progress** to **Resolved**.



## Instructions on How to Create a Ticket in OTRS

8. Once the **NEA Master Data Managers** or the **NEA BIT Technical Support team** have finished processing your incident/request, status of your ticket will change to **Resolved**.

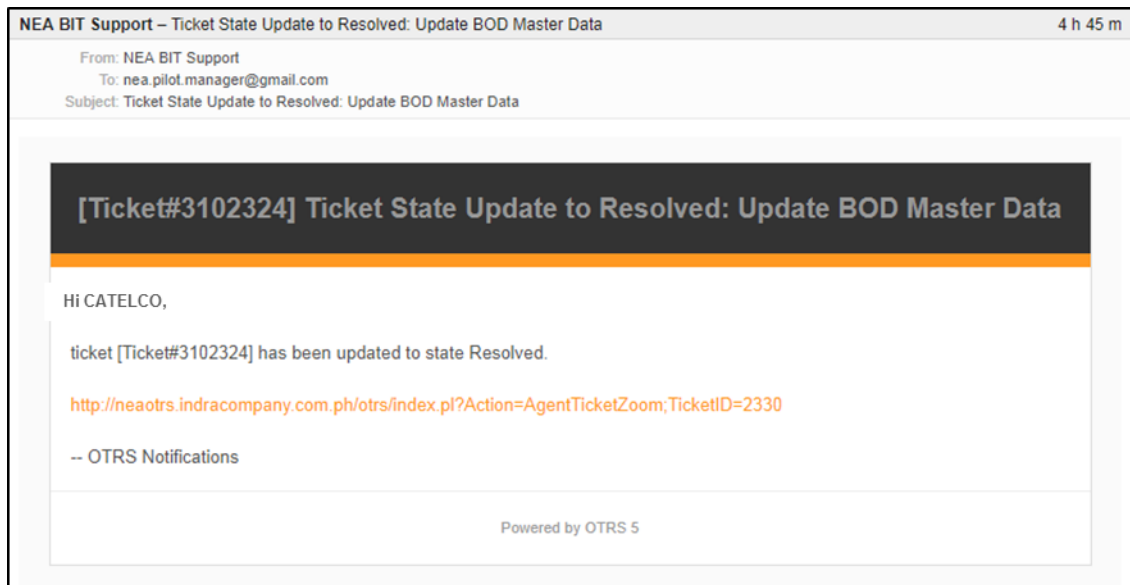


Figure 8.1 Sample Ticket with Status Resolved

9. Your confirmation is needed to close the ticket. Confirm resolution or completion of the incident/request by updating the ticket. Follow the steps below.

- 9.1. Click on the ticket on the dashboard and click **Reply**. The **OTRS Incident/ Request form** will be displayed.

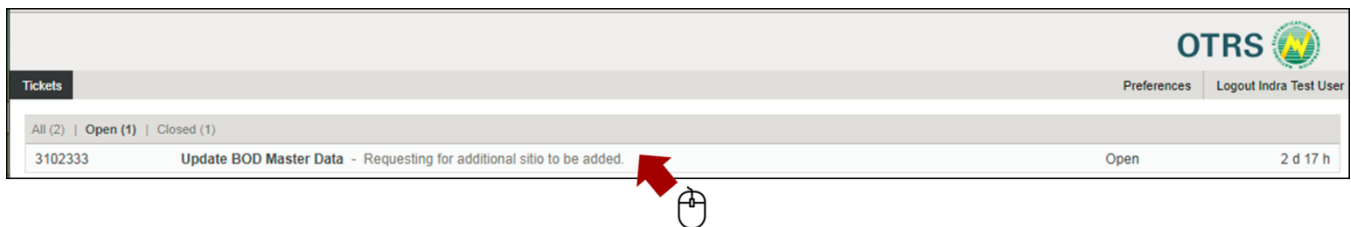


Figure 9.1.1 OTRS Dashboard

# Instructions on How to Create a Ticket in OTRS

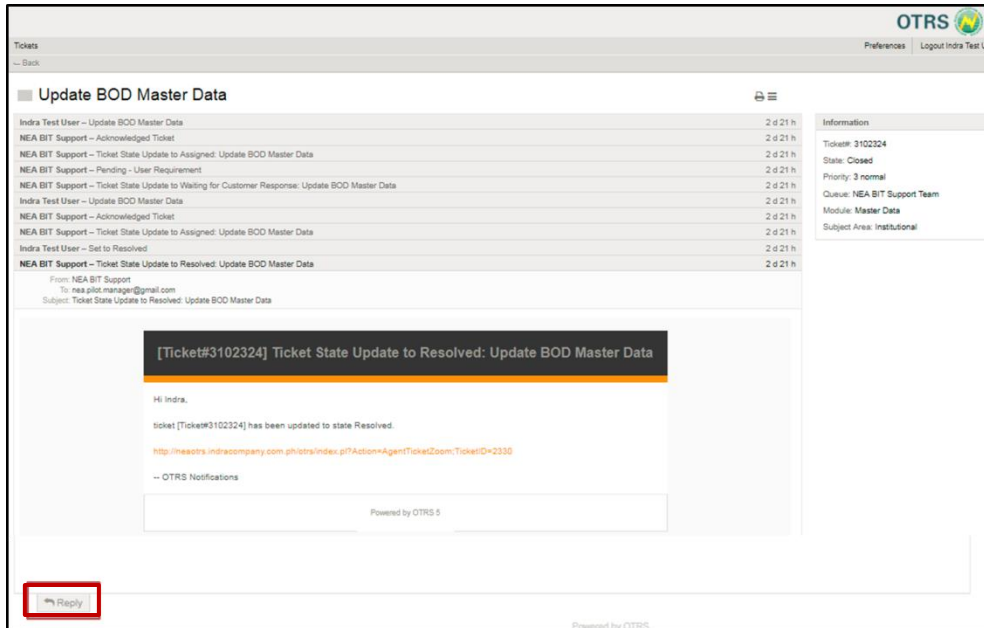


Figure 9.1.2 OTRS Ticket Details

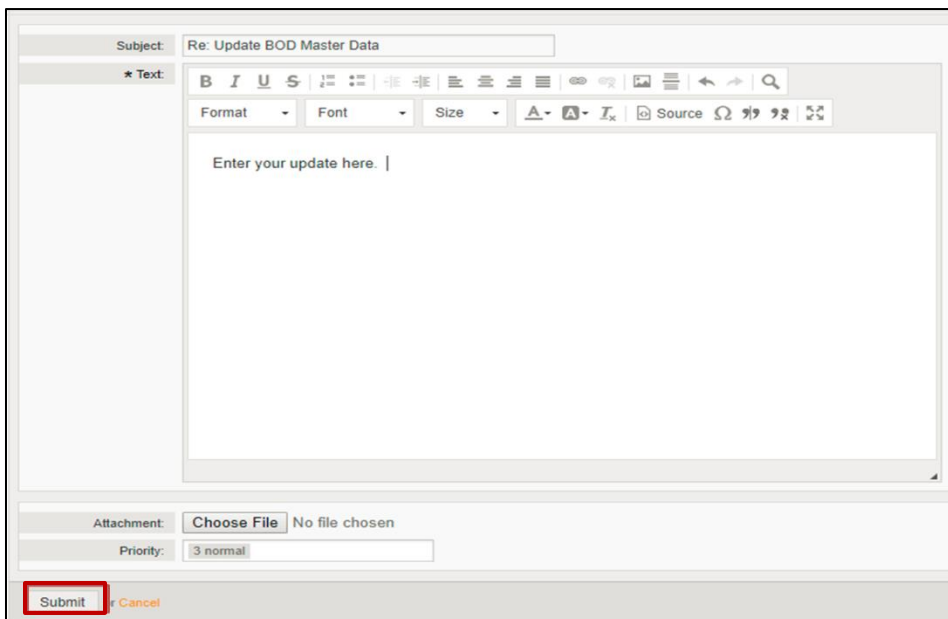
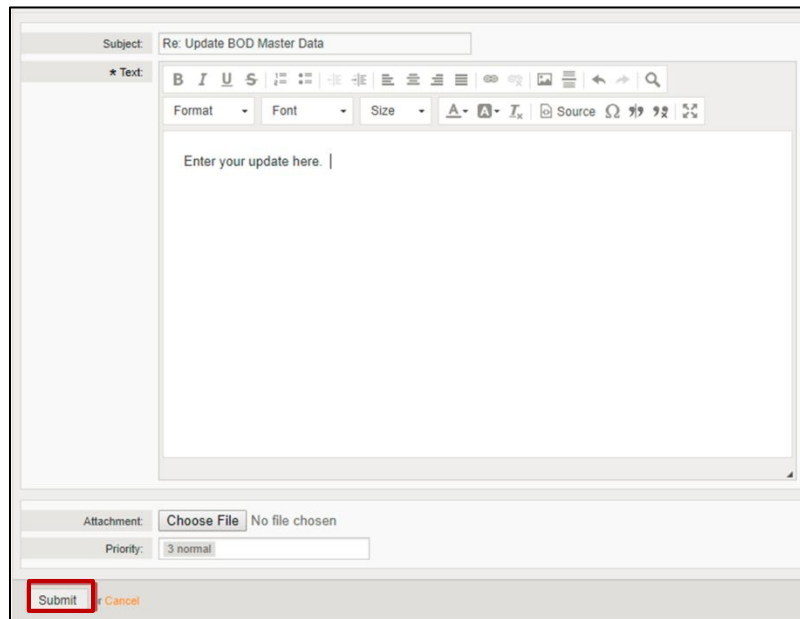


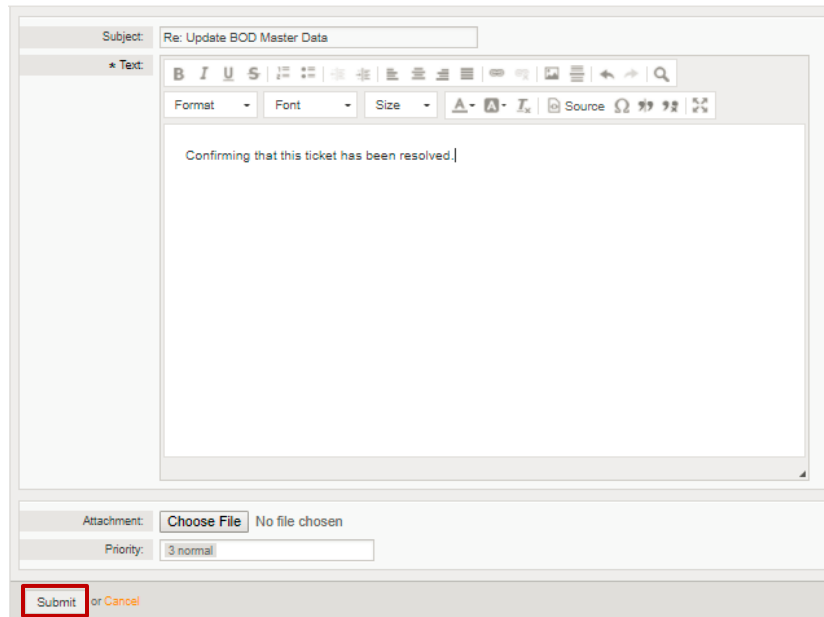
Figure 9.1.3 OTRS Incident/Request Update Form

## Instructions on How to Create a Ticket in OTRS

9.2. **Fill** out the form with the required information and click **Submit**. See sample below.



The screenshot shows the OTRS Incident/Request Update Form. The subject is "Re: Update BOD Master Data". The text area contains the placeholder "Enter your update here. |". The attachment field shows "Choose File" and "No file chosen". The priority is set to "3 normal". The "Submit" button is highlighted with a red box.

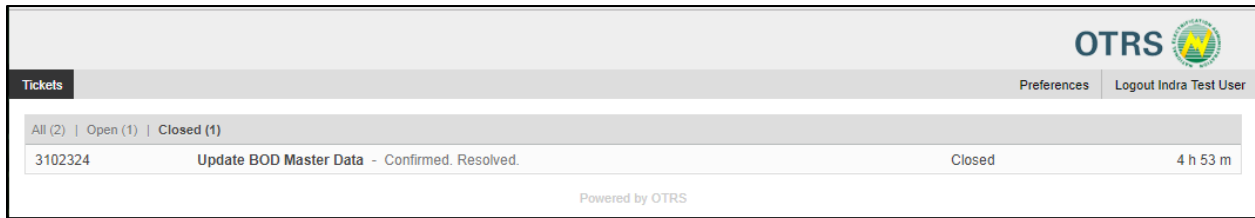


The screenshot shows the OTRS Incident/Request Update Form after the update. The subject is "Re: Update BOD Master Data". The text area contains the text "Confirming that this ticket has been resolved. |". The attachment field shows "Choose File" and "No file chosen". The priority is set to "3 normal". The "Submit" button is highlighted with a red box.

Figure 9.2.1 OTRS Incident/Request Update Form

## Instructions on How to Create a Ticket in OTRS

10. After NEA BIT Helpdesk has received your confirmation that ticket has been Resolved, NEA BIT Helpdesk will change the status to **Closed**. The **Closed Status** will be reflected in the OTRS Dashboard.



*Figure 10.1 Sample Ticket with Status Closed*