

# OTRS Guidance for Curators

**Last Updated:** 2024-06-25

Note: This document and process may be slightly refined when new curators are onboarded and we have tested the functionality.

The FRDR service team uses [OTRS](#) (Open-Source Ticket Request System) to process and manage external communications with depositors and other end-users. Emails sent to [support@frdr-dfdr.ca](mailto:support@frdr-dfdr.ca) will automatically open a ticket in OTRS, and curators use OTRS to communicate directly with depositors when revisions are needed. We use OTRS, rather than a personal email address, to give a sense of consistency to depositors (all FRDR messages are received from, and sent to, the same address) and so another curator can take over a help ticket in your absence.

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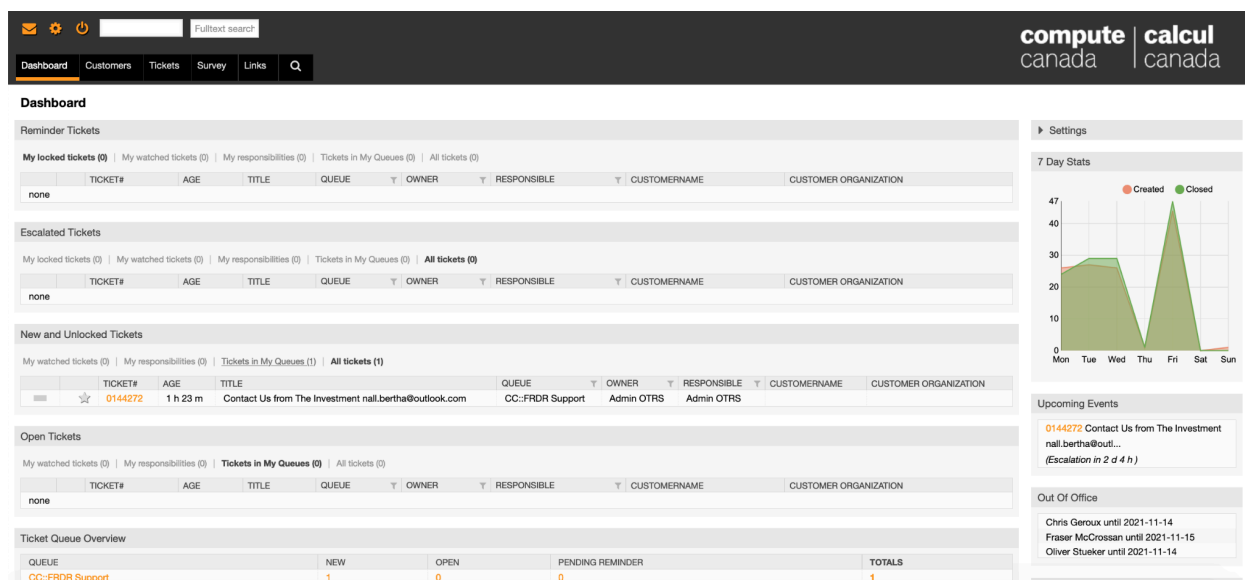
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# OTRS interface

When you log in to OTRS, you will see your Dashboard. From here you can:

- Create and send new external communications by clicking the envelope icon in the top, left corner of the screen
- Answer incoming tickets (listed in the *New and Unlocked* queue)
- Manage your open tickets (listed in the *Open Tickets* queue)
- Visualize tickets that are “escalated” or “pending”
- Search for previous tickets, or other correspondence from the same customer, using the magnifying glass icon.

A more complete list of the “queues” or various ways in which tickets are organized in OTRS is included below.



## OTRS organization

Tickets in OTRS are sorted in two main ways – by “status” of the ticket (i.e., new, open, escalated) or by “queue” the ticket belongs to.

## OTRS queues

OTRS is used by various Alliance services, each of which has its own queue(s). When your OTRS account is created, you will be added to the two FRDR-specific queues, **CC::FRDR Support** and **Staff::FRDR**. You can access these queues directly from the “Ticket Queue Overview” at the bottom of the OTRS dashboard.

### FRDR support queue (CC::FRDR Support)

The FRDR support queue contains messages that were sent to [support@frdr-dfdr.ca](mailto:support@frdr-dfdr.ca), e.g., by depositors, end-users, and people with questions about the repository. The email address [support@frdr-dfdr.ca](mailto:support@frdr-dfdr.ca) is found throughout our documentation and the submission interface, and it appears in the website footer. This address is also shared in presentations, and is the one we prefer people use to communicate with FRDR!

New messages created and sent by curators as part of the deposit review process should also appear in this queue. The process for [creating outgoing help tickets](#) is described in further detail below.

## FRDR staff queue (Staff::FRDR)

The FRDR system sends automated email notifications when various actions are taken, e.g., when a new deposit is submitted, when a dataset is approved for publication, or when a new FRDR account is created. Most of these notifications are sent to the depositor directly and do not create a ticket in OTRS, but if researchers reply to one of these automated notifications, their messages may end up in the FRDR Staff Queue.

One notable exception is FRDR New Submitter Applications, which are sent to the FRDR Staff queue as a matter of course. These require intervention by a curator. The process for reviewing and accepting (or rejecting) new submitter applications is covered in more detail in the [FRDR Administrative Tasks](#) document.

## OTRS status

OTRS tickets are also grouped by their system status (reminder, escalated, new and unlocked, or open). Within each status, you can set a filter to limit the number of tickets you are viewing. The default “All Tickets” will display tickets in all of the Alliance’s OTRS queues (most of which are managed by the ARC National Teams), while the “Tickets in My Queues” filter will display only tickets that belong to the FRDR Support and FRDR Staff queues. Each status is described below, along with a recommended setting for the filter.

### New and unlocked tickets

This queue contains incoming support tickets. Many of these are new requests, although some may be a response to a ticket that doesn’t have an “owner” assigned, or a response to an older support ticket.

**Recommended Filter:** Tickets in My Queues

### Reminder tickets

This queue contains items that you have manually set to the status “pending reminder”. This may be done if you are waiting on a response and don’t expect it to come quickly, or if you want to follow up with someone after a specific amount of time has passed. When you set the status of a ticket to “pending reminder”, you’ll be asked to select the date on which you want to take action again.

**Recommended Filter:** My responsibilities

## Escalated tickets

This queue contains items that have been “escalated” by the system, typically due to slow response time, and it is intended to flag tickets that should be prioritized. However, there are cases where a researcher sends us a new message by replying to an older ticket, and these might be immediately (unhelpfully) escalated by the system!

**Recommended Filter:** My responsibilities

As volume increases, we may consider setting this to “Tickets in My Queues” so we can jump in where someone else might be overloaded.

## Open tickets

When “New & Unlocked” tickets are claimed (assigned an owner or responsible party), they transition to “Open” tickets. This queue may also include incoming responses to tickets you own or are responsible for.

**Recommended Filter:** My responsibilities

## Outgoing help tickets (Curator → Depositor)

Communications with the depositor, including recommendations, change requests and clarifying questions, go through the OTRS system. This sends the depositor an email and allows us to easily track the conversation, see who is assigned to it, and get notifications if the ticket has been left open too long. It will also allow another curator to take over communications if the primary owner is out of the office. To open and send a new message to a depositor:

- Click the envelope/mail icon in the top left corner of the OTRS interface
- Click the ‘From queue’ and click the Down arrow next to CC to display your options.
- Choose “FRDR Support” from the menu
  - Note, in this case CC stands for Compute Canada rather than carbon copy
  - Selecting FRDR Support will auto-populate your signature at the bottom of the message
- Add a subject line
  - For tickets related to new deposits, use a subject line similar to: Recent FRDR submission “Dataset Title (or shortened version of title)”
- Add your message based on notes you took while reviewing the dataset

- Consult the [templates for correspondence](#) for draft text that may be helpful
- If you need to attach a README template, or more detailed curation notes for the depositor, do so now
  - You can click to browse to a file on your computer, or you can drag & drop the file into the “Attachments” section
- Add the depositor’s email at ‘To customer user’. Add the email of any collaborator(s) to the Cc field to copy them on the message
- Change the ‘Next Ticket State’ from ‘Open’ to ‘Closed successful”
- Click ‘Send mail’ to send your message
- You will see a confirmation that your message was sent, along with the help ticket number
  - Add this ticket number to your curation log! You may also want to add a direct link back to the help ticket in your curation log so it’s easier to access in the future
- If you need to return the data deposit so the depositor can make revisions, please do so now (if you have not done so already). You can add the OTRS ticket number to the available message box so it will be recorded in the provenance metadata. Further instructions on returning items are found in the [Curation Workflow](#).

**NOTE: There is no option to save a draft when you are creating a new help ticket!** It has happened to all of us that we lose a connection, or we step away for too long and OTRS logs us out, or we accidentally close the tab, etc. For this reason, you may prefer to draft messages to submitters in a text editor, and copy/paste into a new help ticket when you’re ready to send! Subsequent messages you send, and responses to incoming tickets that were not created by us, *can* be saved as drafts.

## Incoming help tickets

Newly received items appear in the ‘New and Unlocked Tickets’ queue. Those which have not previously been assigned or claimed will be owned by ‘Admin OTRS’. Click the item to access the ticket. You will be directed to a new page with the body of the message and will have the option to lock the ticket and respond to it directly, or to assign it to another owner. You can also drop it back in the queue if you don’t have capacity to claim and respond at the moment.

New and Unlocked Tickets									
My watched tickets (0)   My responsibilities (0)   Tickets in My Queues (2)   <b>All tickets (2)</b>									
		TICKET#	AGE	TITLE	QUEUE ▼	OWNER ▼	RESPONSIBLE ▼	CUSTOMERNAME	CUSTOMER ORGANIZATION
		0103815	2 m	Test ticket	CC::FRDR Support	Admin OTRS	Admin OTRS	Erin Clary	ACENET: CARL-ABRC
		0103797	1 h 57 m	Your request to deposit data in FRDR	CC::FRDR Support	Lee Wilson	Lee Wilson		

Currently, it is the responsibility of the Curation team to monitor the FRDR Staff and FRDR Support queues. The Preservation Coordinator, Product Lead, and Technical team all have access to OTRS, but will only claim and respond to a ticket if we request them to do so.

Although we have discussed the possibility of triaging help tickets, we do not currently have a process in place. The volume has been low enough, and our team communicates enough, that this hasn't been a necessity yet. As our volume increases, we will revisit how things are working. It may become the responsibility of the curation services lead to triage and assign tickets to a responsible party, or we may rotate responsibility (e.g., each of us assigned to one day of the week).

For now, if you have capacity and know how to answer, or if you can work with others to get the answer and respond, please claim the ticket! Further instructions claiming and responding to tickets, or assigning tickets to others, are included below.

# Claiming or Assigning a Ticket

**Ticket#0103815 — Test ticket**

Back | Lock | Owner | Responsible | CustomerID | Note | Pending | Watch | Close | Miscellaneous ▼ | - Move -

▼ Article Overview - 1 Article(s)

☆	NO.	TYPE	≡	FROM	SUBJECT	CREATED	🔗
	1	customer – email-external	↔	Erin Clary	Test ticket	2020-09-23 15:11 (-7)	

▼ Article #1 – Test ticket Created: 2020-09-23 15:11 (-7)

Plain Format | Print | Split | Bounce | Forward | - Reply -

From: Erin Clary

To: support@frdr-dfdr.ca

Subject: Test ticket

To claim the ticket and respond to it yourself:

- Click 'Lock' to make yourself the owner and responsible party. Locking the ticket ensures that no one else will try to claim and respond to the ticket simultaneously.

To assign the ticket to a new owner or a new responsible party:

- Click 'Owner' or 'Responsible' (a new window will pop up)
- Click in the empty box next to 'New Owner' or 'Responsible' and select a name from the drop down menu
  - Use 'Responsible' to keep someone (e.g. preservation coordinator or curation services lead) notified of the correspondence. This is particularly important for tickets with a preservation angle.
- If you need to add a note to the individual you are assigning the ticket to, you can do so here, or you can leave the canned message
- Click "Submit" to save your changes

NOTE: We don't assign tickets to others very often. Again, this process may be revisited in the near future, as our volume and workloads continue to increase, but for now, since the volume is relatively low, we typically leave incoming tickets in the queue when we don't have capacity to answer. This allows someone else to pick it up. If you do assign a help ticket to someone else, you may want to ping them in Slack to let them know you've done so!



# Handling help tickets you own

Tickets that are claimed by you or assigned to you will appear in your Dashboard under “Open Tickets”. If your filter is set to “Tickets in My Queue”, you will see all open tickets in the FRDR Support and FRDR Staff queues, including those owned by you and other members of the FRDR team. To view only those you own or are responsible for, click “My responsibilities”.

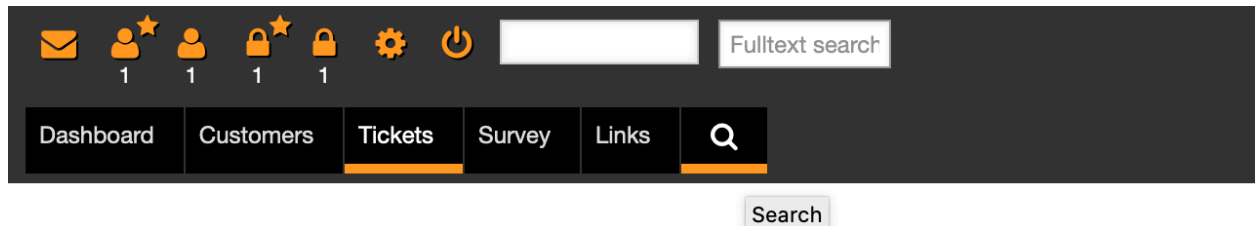
Open Tickets									
My watched tickets (0)   <b>My responsibilities (3)</b>   Tickets in My Queues (4)   All tickets (4)									
		TICKET#	AGE	TITLE	QUEUE ▼	OWNER ▼	RESPONSIBLE ▼	CUSTOMERNAME	CUSTOMER ORGANIZATION
<input type="checkbox"/>		0103815	29 m	Test ticket	CC::FRDR Support	Erin Clary	Erin Clary	Erin Clary	ACENET: CARL-ABRC
<input type="checkbox"/>	★	0103776	5 h 38 m	SuperDARN RAWACF files in FRDR	CC::FRDR Support	Erin Clary	Erin Clary	Kevin Krieger	WestGrid: University of Saskatchewan
<input type="checkbox"/>	★	0103317	6 d 0 h	Athabasca Dataset (0281)	CC::FRDR Support	Erin Clary	Erin Clary	Amber Peterson	WestGrid: University of Saskatchewan

To respond to a help ticket that you own:

- Click the hyperlinked Ticket # to open it
- Click the box next to ‘Reply All’ and select “empty answer template”
- A new window will open, into which you can add your message.
- When responding to existing tickets, you will have the option to “Save as new draft” if you need to pause or come back to it.
  - You will be asked to name your draft. Choose something simple, and consider adding the date or another way to keep track of when you were last drafting.
- When your response is complete, you can send your message by clicking “Send Mail”. A few things to note:
  - Where it says “Next ticket state” with value “open”, choose a new state.
  - Most often you will choose “closed successful” which will close the ticket when you send your reply. The ticket will open again automatically if you receive a response, and will appear again in your ‘Open Tickets’ queue.

- For replies to external parties, the “Visible for Customer” box will be checked by default!

## Searching for existing tickets



You can search for existing tickets using the ‘Fulltext Search’ box, or by clicking on the magnifying glass icon, which will pull up an advanced search options menu.

Note: For “Fulltext search”, type your query into the box and then press enter (although “Fulltext search” looks like a button you can click, it’s not).

If you want to limit your search to a certain queue or if you know something specific about a ticket, the advanced search option is typically the most efficient way to search. In the advanced search menu, you can add a term or customer name to the “Fulltext” box and then limit by Queue (e.g., limit your search to the FRDR Support Queue).

By default, a limited number of options appear in the advanced search menu, but there are many attributes you can use to limit your search. For example, you can search only in the “subject line” or only in the “attachment name”, or you can limit by date. If you know the OTRS ticket number, you can use the “Ticket Number” attribute. To add another option to the advanced search menu, click the box next to “Add another attribute” and select how you would like to limit your search. Then type the number, name, phrase, etc. by which you want to search and click “Run search”.

Search

×

Create New

Filters in use

Fulltext:

⊞

Searches in the attributes From, To, Cc, Subject and the article body, overriding other attributes with the same name.

CustomerID (complex search):

(e. g. 234321)

⊞

State:

⊞

Queue:

⊞

Customer Organization (e.g. Text or Te\*t):

⊞

Ticket tags:

⊞

Software (e.g. Text or Te\*t):

⊞

Additional filters

Add another attribute:

Ticket Number

×

⊞

Output:

Normal

Q Run search

## Printing correspondence

We currently save a copy of submitter correspondence as a PDF alongside the curator log file (i.e. as an attachment to the Jira ticket) as a matter of transparency in our process. Once you have published an item, you will need to “print” any correspondence you have with the submitter through OTRS. To do so:

- Open the appropriate ticket
- Mouseover “Miscellaneous” in the menu at the top of the ticket. Select “print”.
  - Note: the ‘Print’ option above the email body will only print the selected email
- This should open the exchange as a PDF. Download the file, and name the downloaded file “pub\_NNNN\_email\_log.pdf”
- Attach the PDF to the Jira ticket for that publication

## Ticket#0146215 — Recent FRDR submission "Inventory of Canadian Repository Platforms"

The screenshot displays the OTRS ticketing system interface. At the top, a navigation bar includes links like Back, Lock, Owner, Responsible, CustomerID, Note, Pending, Watch, Close, and Miscellaneous. Below this, the 'Article Overview - 6 Article(s)' section shows a table of tickets. A blue circle highlights the 'PRINT ALL' button and a dropdown menu with options: History, Print, Priority, Free Fields, Link, E-Mail Outbound, Merge, and Download ticket attachments. The table lists tickets with columns for NO., status icons, and SENDER.

NO.	☆	⇄	SENDER
6	→	→	Yvette Rancourt via FRDR Support
5	←	←	Julie Morin
4	→	→	Yvette Rancourt via FRDR Support
3	→	→	Yvette Rancourt via FRDR Support
2	←	←	Lise Brin

Below the table, the email details for ticket #6 are shown, including 'From: Yvette Rancourt via FRDR Support', 'To: julie.morin@carl-abrc.ca', 'Cc: tamanna.moharana@engagedri.ca, info@carl-abrc.ca', and 'Subject: Recent FRDR submission "Inventory of Canadian Repository Platforms"'. A red circle highlights the 'Print' button in the email action bar. The text 'PRINT SELECTED' is visible in orange.

## Additional resources

Additional resources that may be useful are linked below.

- [Helpdesk Handbook](#)
  - The Helpdesk Handbook contains extended OTRS guidance, and is maintained by the Federation (formerly the Compute Canada Federation). The Handbook is part of the Federation's wiki, and login with your CCDB account is required to access the contents.
  - PDF copies of some of these pages are also available in the FRDR shared Drive in: [FRDR/Procedures/Ticketing System \(OTRS\)](#)
- FRDR [Templates for correspondence](#)
  - This is a working/living document with sample correspondence for a variety of scenarios we encounter in FRDR. Some of these are encountered quite

frequently, others may be more rare, but we've found it useful to have draft text as a starting point.

- These can be copied into OTRS and modified to match your specific use case.
- NOTE: Document is currently a DISASTER! This is on the list to be reviewed and cleaned up and should be done soon, hopefully before you need to address any help tickets!