Request Tracker

Request Tracker is the ticket tracking system that is used by many groups at MIT. It is a web and perl based tracking system developed by Best Practical. IS&T and the computing helpdesk migrated from Casetracker in the Summer of 2006 and the RCCs migrated from the RCCdb tracking system in late Fall 2006.

First time using RT
RT allows certificate based and password based authentication. RT does not use your kerberos password. It has its own password store and you must setup a new password before you can login using this method.

After successfully logging into RT, you should immediately go to the preferences page to correctly setup your profile in RT. Please follow the directions below accurately.

Setting Preferences
When you first open RT by going to http://help.mit.edu, you should click the “Certificate Login” button. Once you're logged in, proceed to set your preferences. You can get to the preferences page through the preferences link on the left hand column

- Set your password – This can come in handy if you have to access RT from a computer that you do not have certificates on.

1. Change your default ticket page to Call Center Update Page
   - If you do not like this page view, you can change it later.
   - Call Center Update view offers the most information on one screen
2. Change your Default Working Queue to Help Desk::Athena
3. Select the Help Desk::Athena for your Quick Search queues.
   - They will now show up on the right hand side of the main screen
   - Also select Help Desk::Call Center if you work for the HD or want to include Helpdesk tickets in your search results
4. Set ‘New Ticket’ links create tickets immediately to YES
5. Set Requestor ‘Change’ Button on Call Center Screen to YES
6. Create a signature that best reflects your status as an IS&T Client Support Services employee. For Athena Consulting, please enter:

Your Name  
Athena Consulting  
Client Support Services  
MIT Information Services and Technology  
x3-4435  
olc@mit.edu  

Volunteer Consultants may replace “Athena Consulting” with “Volunteer Athena Consultant”.

7. Click **Save Preferences** (other changes can be made once you are comfortable using RT)
1 New Ticket create
To create a new ticket, select the appropriate queue from the list. If you set your RT preferences correctly, Help Desk::Athena should appear as the default in this list. Then click “Go…”

2 Search Box
To quickly view a specific ticket, you can type the RT ticket number into the search bar at the top of the RT screen. This will be available from any page within RT. You can also search for the requestor's email address through this search bar.

3 Saved Searches
You will automatically see the helpdesk-athena group saved search named OLC Queue on the RT home screen. You can also use the Search page in RT to add your own personal saved searches. If you have any suggestions for saved searches that would benefit the other consultants, feel free to submit them to the OLC supervisors.

In the image above, the helpdesk-athena searches are at the bottom of the saved searches list. There are also two personal saved searches in this list. They are under “My saved searches.”

4 Quick Searches
The quick searches are set through the preferences page. Once you select the queues in the preferences section of the preferences, they will appear on the right hand side of your RT home screen. Here you can see the number of new, open and waiting tickets in each of the queues and:

- View all new open and waiting cases by clicking on the name of the queue
- View all the new tickets, open tickets or waiting tickets individually by clicking on one of the respective numbers.
**Searching RT**

The easiest way to perform a search for a particular ticket is to use the link on the left hand column “Ticket Search.” By default, this should open the simple search page. There are two other types of searches you can do in RT, the Query Building and Advanced. These will not be covered in this manual. Query Builder can be used to create your own “saved searches” mentioned above.

**Search the correct queue**

When starting a new simple search, it's important to note that it will default to searching your default working queue and only new, open or waiting tickets. So please check to make sure the queue you're searching in is selected (you can select more than one queue) and if you're looking for cases that could be resolved or rejected, please include those status types as well.

It's also a good idea to narrow down your search criteria as much as possible. Searching through multiple queues, large date ranges or through the ticket history rather than subject/requestor can result in very time consuming searches. If you can narrow down the queue, status or creation date, then the search will finish much, much quicker than an ambiguous search.

**Using the query builder to create saved searches**

Saved searches are items that appear in the center of the RT homescreen. As a member of the OLC group, you should see the OLC Queue saved search. More saved searches may be added later.

To build your own saved search, first use the simple search to create the parameters and find the results. Once the search completes, click on the Query Building link. You should now see the parameters for your search in the Query box on the upper right. Below that, you can type the name of your search and click save. This will save it in your personal saved searches. If you'd like to suggest the search for all consultants, click the Advanced link and copy the text of the search in an email to olcsuper@mit.edu.
**Search and Quick Search results**
The ticket view screen (Quick Search list on the right) is also a saved search and will display the search results much like the saved searches on the home screen.

<table>
<thead>
<tr>
<th>Ticket</th>
<th>Requestors</th>
<th>Created</th>
<th>Topic</th>
<th>Owner</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>96509</td>
<td><a href="mailto:fmsvi@mit.edu">fmsvi@mit.edu</a> server snr.</td>
<td>Tue Sep 18 18:26:15 2007</td>
<td>waiting</td>
<td>other</td>
<td>49 min ago</td>
</tr>
<tr>
<td>496879</td>
<td><a href="mailto:dforne@mit.edu">dforne@mit.edu</a></td>
<td>Tue Sep 18 17:14:11 2007</td>
<td>waiting</td>
<td>matlab</td>
<td>91 min ago</td>
</tr>
<tr>
<td>496993</td>
<td><a href="mailto:iansmith@mit.edu">iansmith@mit.edu</a> web form</td>
<td>Wed Sep 19 05:51:14 2007</td>
<td>waiting</td>
<td>Nobody</td>
<td>82 min ago</td>
</tr>
</tbody>
</table>

- # - **Ticket number** – unique RT ticket number.
- **Requestors** – email address of the ticket requestor (person needing help)
- **Created** – Relative time since the ticket was created
- **Topic** – Corresponds to one of our pre-defined OLC topics
- **Last Contact** – how long ago we sent mail to the client
- **Subject** – The subject line of the e-mail the user sent us
- **Status** – Open, New, Waiting, Resolved, Rejected or Deleted
  - New means the ticket has not yet been seen (OLCR: unseen)
  - Open means we are currently working on the ticket (OLCR: pending)
  - Waiting means we're waiting for a response from the client (OLCR: pickup)
  - Resolved – case is considered resolved and should be closed (OLCR: done)
  - Rejected – used for SPAM (OLCR: cancel)
  - Deleted – shouldn't be used. We cannot get tickets back that are deleted
- **Last Updated** – last time anything was done with the case
  - usually indicates the last time the client sent mail or we sent mail to the client
- **Priority and Time left** – Not used
Take, Release Steal

Like the old OLCR system, RT requires you to take ownership of a ticket before you can update it. **Unlike the old OLCR system**, this is required for comments as well as replies to the user.

When you first view a ticket, you'll see the “Display” page, which contains read-only information about the ticket. At the top of the screen, you'll a message like this one:

![Display page](image)

To work on the ticket, click the **Take** link in the top right corner of the screen.

When a ticket is owned by someone else, you'll see this message instead:

![Owned by someone else](image)

You can click “Steal” to take ownership of the ticket.

**Note:** Do NOT steal tickets without first checking with the person who currently owns the ticket. If they're not logged in (zephyrable), it's probably ok to steal it, but if you're not sure, please don't steal it. If the person is in the middle of composing a reply, and you steal the ticket, they will be unable to save the reply and it will be lost.

When you are done working on a ticket, be sure to release it by clicking the “Release” link in the top right hand corner of the screen:

![Ticket Release](image)

Alternatively, you can release all your tickets by clicking the “OLC Release” link in the left sidebar.
Displaying ticket Information
If you set your preferences to use the “Call Center Update Screen” by default, then you're ticket display should look similar to the image near the bottom of this page.

To view the ticket information, either 1.) click on the ticket number from any search results page or 2.) type the ticket number into the search box at the top of the page. You can also 3.) click on the link from any email pertaining to the ticket you'd like to display.

If the ticket is not displayed in the Call Center View, you can click on the Call Center link on the left hand column. The Call Center View should have a text box in the right hand column to update the ticket. This view contains the most amount of information in one screen.
**Updating the ticket**
The easiest way to update a ticket is to use the Call Center View. This view will show you all of the ticket custom fields: Topic, Hostname, Workstation Info, Summary, etc..., the ticket history on the lower right and a text box to add any new entries in the upper right.

Please make sure the Topic is correct. Many users send e-mail to olc@mit.edu, which shows up as “other”. The first thing to do after “Taking” a ticket is to make sure the topic is correct.

**Adding a comment or replying to the customer**
The text box in the upper right hand corner is where you should type most updates to the case.

- Select the appropriate update type (reply or comment)
- Type your message in the box
- Click Save Changes (in the upper right hand corner) to complete the update.

**Difference between Reply and Comment**
Within the RT web based application, replies are visible by anyone with read access to the queue as well as the requestor of the ticket. Comments are only visible to the consultants with access to the queue, not to the requestor.

When the Send Email button is checked or when corresponding through an email client rather than the RT frontend, RT will email certain recipients based on whether an update is a reply or a comment.

- Replies will be emailed to the requestor, adminCCs and Ccs (if they exist.)
- Comments will be emailed to the ticket and queue adminCCs.

**How to add an additional recipient or change the recipient list**
(*this is useful when forwarding information to olcsuper@mit.edu)*
To add an additional recipient or to change who the email gets sent to entirely, click on the reply or comment link near the top of the page.

Then add the recipient to the To:, CC: or BCC: line in the update screen. Use the checkbox to select or deselect the original recipients. Click **Update Ticket** to send the email.
Reply to or comment a ticket using email
All mail you receive regarding a case should always come from AND be sent to one of these email addresses:

- **OLC Reply address:** olc@mit.edu
- **OLC Comment address:** olc-comment@mit.edu

This allows RT to handle all correspondences and forward each one to the appropriate receivers. Because of this, replying to any mail you get from RT will put your reply into the case as long as the subject line is preserved.

If you are corresponding through email, be sure that the subject contains:

```
[help.mit.edu #<ticket number>]
```

Depending on which email address you send to (comment or regular) will determine if the requestor also gets an email.

- Sending to the **comment** address will put your update in the ticket history, but it will not send mail to the requestor. The requestor will also **not** be able to see that particular update in the ticket history.
- Sending to the **regular** address will put your update in the ticket history, email your comment to the requestor. The requestor **will** be able to see that particular update in the ticket history.

**Additional Recipients**

When adding a correspondence to a ticket by sending email to RT, additional recipients can be added by simply using the **CC** or **BCC** fields when composing the message.