

Request Tracker Queue Manager Design Workshop
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Call Center Facilitator manages the front end, i.e., daily incoming work and acts a traffic manage keeping all shift staff active. Facilitator's major concern is responsiveness in the moment. Queue manager manages the back end, i.e, reviewing queue to track how long cases has been unresolved and resolve them. Queue manager looks at the whole queue (stale, active, frozen), move them forward, resolve them.

QUEUE MANAGER DUTIES AND DESIRED FUNCTIONALITY:

1. Check incoming cases that are currently in the first tier to see if cases:

- stay in Help Desk category?
- go to an internal to Help Desk category, e.g., backup
- get referred to an external category, e.g., TNS Installs

Desired functionality: A more automated routing mechanism.

RT solution: Create scrips.

2. Determine the nature of the problem:

- Is it the program the client is using?
- Is it machine configuration?
- Is it user error?
- Are we waiting for a response from the client (i.e. is the case frozen)?

3. Assign actionable cases.

- Deal with stale cases (those older than 7 days) and send a reminder message.
- Assign cases to consultants.
- Move cases in and out of frozen status based a client response, or lack of response.

Desired functionality:

- Automate the searching of frozen cases and send a follow-up email message.
RT solution: Use status type of Stalled as alternative to Frozen? Search on "stalled" then send canned message (see third bullet in this list).
- Email sent to consultant when case is assigned to him/her (This currently exists in the web version of CT.)

RT solution: Create Scrip.

- Email templates that can be used as standard replies. The ability to fill in custom information manually then send message. The ability to attach articles to this email.
RT solution: a) Use full text custom field to stored canned reply, then include it in a Reply. b) When RTFM is implemented, store canned reply as article.
- Better indication of idle time, i.e., how long a case has not been worked on vs., how long connected or how long it's remained in a certain status.
RT solution: Last updated column in search results indicates hours/days since a case has been updated. Will this suffice?
- Assign a case to a group of people in addition to assigning one person.
RT solution: Use the Watcher feature?

4. Connect to cases.

Desired functionality:

- Retain the ability, currently in CT desktop, to connect to a case, i.e. hold it and prevent others from "touching" it. Also have a means of disconnecting a case held by another consultant.
- The ability to track connection patterns, i.e., the number of cases a consultant connected to. Is it too many? Too few?
- Determine which consultants are browsing cases and which ones, i.e., looking at cases but are not connecting.

RT solution: Is there a way that connecting/disconnecting can be mimicked in RT?

5. Search and sort cases, and examine unassigned cases.

Desired functionality:

- Ability to sort cases by client, date, platform.
RT solution: Click on column headings in search results.
- Collapsible/expandable history entries, as exists in CT Desktop.
RT solution: It's available in RT.
- Availability of history entry tags, e.g., talked to client, as exists in CT.
RT solution: Will be available in upcoming release.
- Better printing functionality, i.e., better than printing a web page.
RT solution: Using File>Print from Display view produces a well-formatted paper copy.

- Ability to search and sort multiple queues.
RT solution: Create a canned search and make it available to all queue consultants.
- Ability to mine historical data, e.g., how many Netscape Problems came in? Full text search functionality is desired.
RT solution: Create a canned search and make it available to all queue consultants.
- Ability to show/hide columns in a queue listing.
RT solution: Feature is available in RT.

6. Resolve cases.

- Desired functionality: Attach articles to email replies, including automated email replies.
RT solution: Feature is available in RT.

General note:

Status definitions need review and refinement.