

RT: Request Tracker software

RT is the tool we use for managing requests to a department. Departments include Technology, ESS Case Managers, and Financial Services. More may be added as time goes on. The log in page for RT is here <https://help.4j.lane.edu/index.html>

How can you enter a ticket?

- Send an E-mail to one of these addresses.

| | | |
|---------------|-------------|-----------|
| CIStechrepair | CMAssist | 4JDesktop |
| nethelp | phones | sis |
| zimbra | 4jtechmaint | |
- Fill out a 4J District Web, school, or ESS form.
 - The district form is here <http://www.4j.lane.edu/technology/desktop/helpform/>
- Log into RT and enter a ticket directly.
- Tickets can also suddenly appear when they are transferred from another queue.

What are queues? Who sees them?

Queues are the types of requests being made. You can only see the queues that you are assigned to. Some current queues are:

- | | |
|--------------------|-------------------|
| • Tech Maintenance | • Desktop Support |
| • Net Help | • CIS Repair |
| • E-mail | • SIS (Synergy) |
| • Phone Support | • Case Manager |

RT Fields

The number and kind of fields available vary depending on the queue or report. These are the most common fields.

- **Requestor** - End User who sent the email or created the ticket. They will get e-mails with ticket activity.
- **Location** - Initially matches the location for the requestor in the staff directory <http://www.4j.lane.edu/directory>, but can be changed.
- **Owner** - The person who is responsible for seeing that the work is completed.
- **Category** - This field is automatically filled from the subject line, but can be changed.

- **Notify eMail** - Who receives an email when a ticket is created; based on location and sent to the support person assigned to that location.

- **Priority** - Which is the most urgent ticket; 0 is the least important, 5 is the most important.

RT Ticket Status

- **New** - A new ticket with no owner
- **Open** - Someone has responded in anyway. It may or may not have an owner yet.
- **Stalled** - Not used by Desktop Support; Waiting for a response, parts to arrive, etc.
- **Resolved** - Ticket is complete. No further action necessary.
- **Deleted** - Only use if ticket is made in error.

Ticket Management

• Taking Unowned Tickets

- Open RT and look at the Untaken/Unowned Tickets box.
- Click on the word Take to get ownership of the ticket.
- If you want to read the ticket but not own it, click on either the ticket number or subject.

| # | Subject | Queue | Status | Created | Take |
|-------|------------|-----------------|--------|--------------|------|
| 69567 | iPad Help | Desktop-Support | new | 19 hours ago | Take |
| 69564 | Image Test | Desktop-Support | new | 20 hours ago | Take |
| 69563 | TEST 03 | Desktop-Support | new | 20 hours ago | Take |

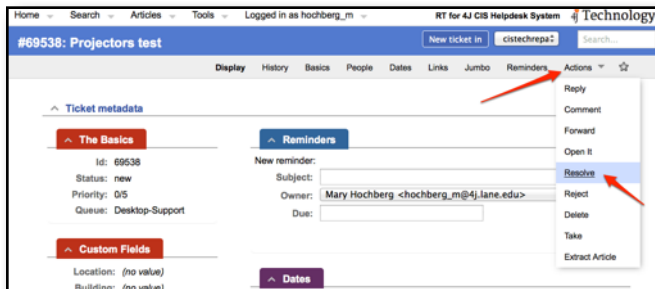
• Moving Tickets To another Queue

- Sometimes a ticket will come to a queue and it needs to be switched to another one.

- Open the ticket and click on Basics
- Click on Queue and change it to the one you want.
- Click on Save Changes.

• Resolving Tickets

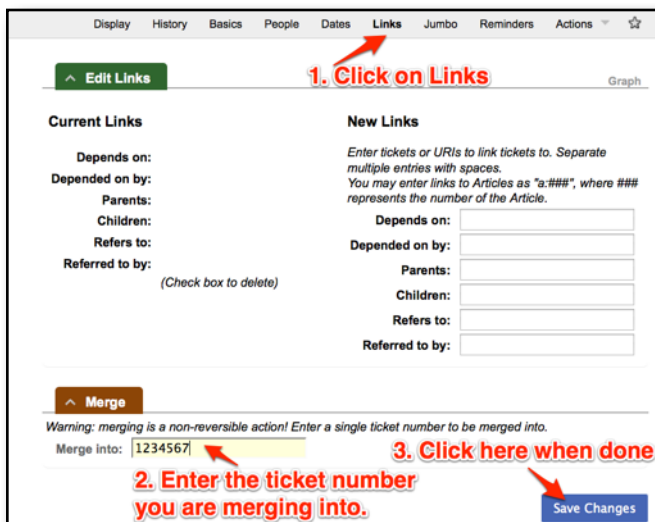
- Once the work on a ticket is complete, the requestor must be notified and the ticket resolved.
- Open the ticket, click on Actions and then Resolved.
- A new window will open.



- Enter your final reply to the requestor. Be sure to include what the ticket resolved and remind them to contact you if there are more problems.
- Make any additional changes to the ticket.
- Click on Update Ticket to save and close the ticket.

• Merging Tickets

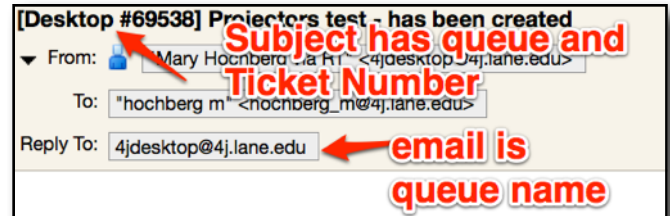
- Sometimes you will get more than one ticket for the same problem. A user can send in the same issue twice or a reply is sent from email without the ticket number in the subject line.
- When that happens you can merge the two tickets into one ticket.
- Open the ticket and click on Links.
- Enter the number of the ticket that you are merging into.
- Click on Save Changes.
- Check the merged ticket to be sure that queue, owner,



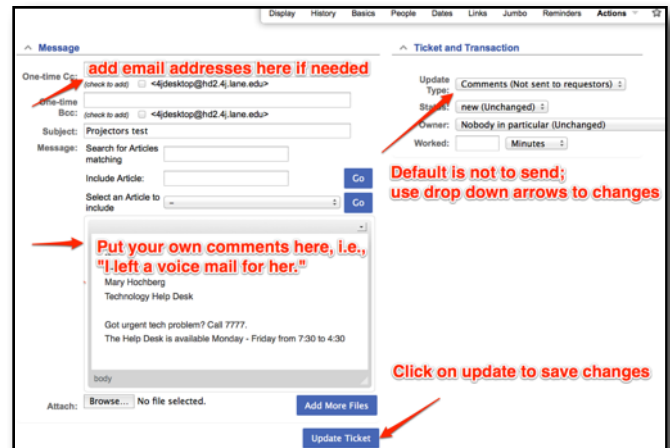
status, etc., are correct. This is especially important when merging tickets with different queues or owners.

• Maintaining Tickets/Comments

- As you work on a ticket, all replies between you and the user will appear in History.
- If you reply from an email and not within RT, as long as the email goes to your queue name (i.e., SIS or Zimbra,) and has the ticket number like this [Queue #1234567] in the subject line, the email will show up in history.



- To add a comment to the ticket, open the ticket, click on Actions, and then Comments. Comments only go to ticket owners or anyone you add as a cc. They do not go to the requestor unless you check the box to add them.



• Stealing Tickets

- If you are helping another ticket owner, they may want you to take the ticket. They can either change the owner to you or you can "steal" the ticket from them. This also happens when a ticket is given to the wrong owner.
- If you steal a ticket, be sure to let them know that you have taken it. The easiest way to do this is to cc them with a comment in the ticket itself.
- Important! As you click on Steal, its yours.

