# RT (Request Tracker) FAQ

## Introduction

We are changing our ticketing system software to *Request Tracker (RT),* which is open source and offers greatly enhanced functionality over what *CVSTrac.*. As of May 28, 2003, we are switching over to *RT* for all ticketing actions and progress tracking. All of your *CVSTrac* tickets are available in the new environment. For all ongoing ticket creations, modifications and correspondence relative to these tickets, use *RT.*

*CVSTrac* is still accessible in read-only mode, for archival purposes and ease of migration.

## Using RT

*RT* has a fairly simple web-based interface from which you create tickets, view tickets, browse queues, etc.

➢ *How do I start up RT?*

1. Either click **RT** from the *Revahertz Network Tools* web page, or use the web browser of your choice to open the following URL:

   https://rt.revahertz.com

   RT displays its login screen.

2. Enter your user name and password.

   ⓘ The first time you use RT, you need to enter the *default password,* `sm000001`.

   *RT* displays the *RT at a glance* page:

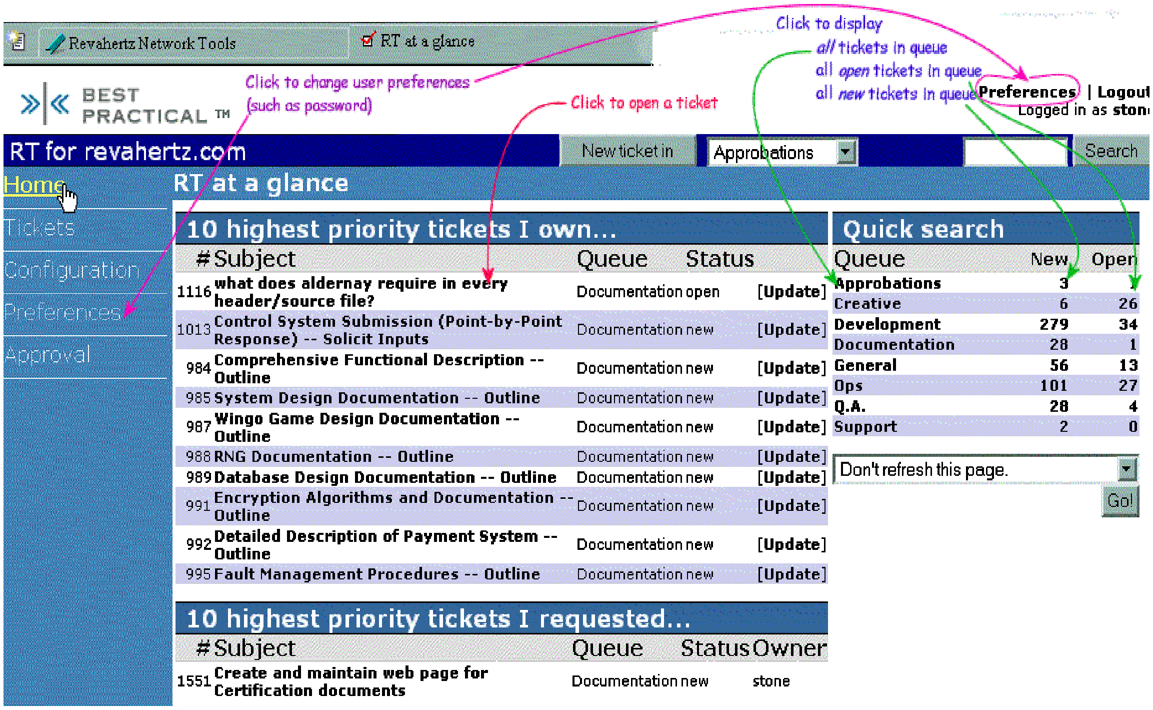



Figure 1 The *RT at a glance* page

The *RT at a glance* page shows the 10 highest priority tickets that you own, and the 10 highest priority tickets that you *requested*. (You can request tickets of anyone, including yourself). In *CVSTrac*, the person who created the ticket was called the *Owner*. In *RT*, the ticket creator is the *Requestor*, and the *Owner* is the person responsible for timely resolution of the outstanding ticket. (See RT concepts for further information about RT's terminology.)

➢ *How do I open or work with a ticket?*

1. Display a list of tickets, by either going to your *RT at a glance* page, or by creating a search query, or by using **Quick Search**.

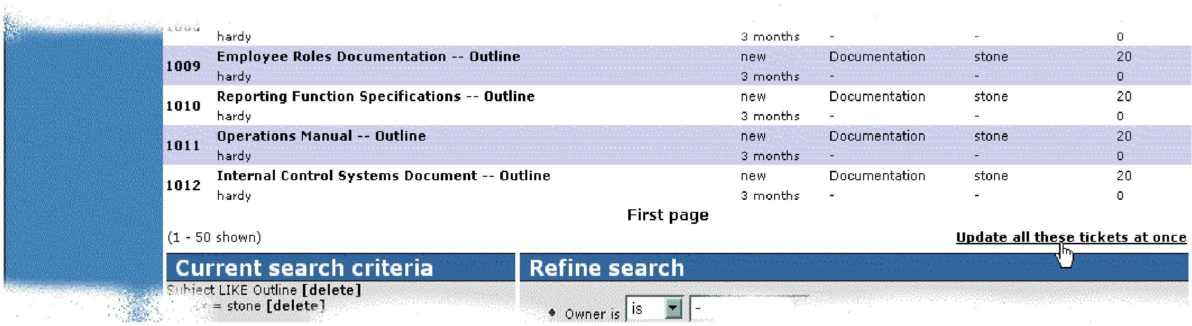
2. Click the number or subject line of a ticket.

ⓘ If you receive an email message that includes the URL of a ticket, you the ticket by clicking the URL from within the message.

➢ *How do I make a change to a batch of my tickets?*

1. Use a Search query to display the set of tickets you want to update.

2. At the bottom of the page of the displayed results, click *Update all these tickets at once*, as shown:




RT displays the list of tickets, with checkboxes in the left column, and the Update Selected Tickets panel at the bottom of the screen.

3. By default, all the checkboxes are selected. Unselect any tickets you don't want to update, and fill in theappropriate fields in the *Update Selected Tickets* panel.

➢ *How do I sort my top 10 tickets by status? Or by Last Contact?*

To sort or refine the results of a search, *either*:

- Click the criteria in the column heading to sort tickets according to that field., and click a second time to reverse the sort order.

  *or*

- Scroll to the bottom of the screen and use the Refine Search fields to narrow or sort your query, as shown below:

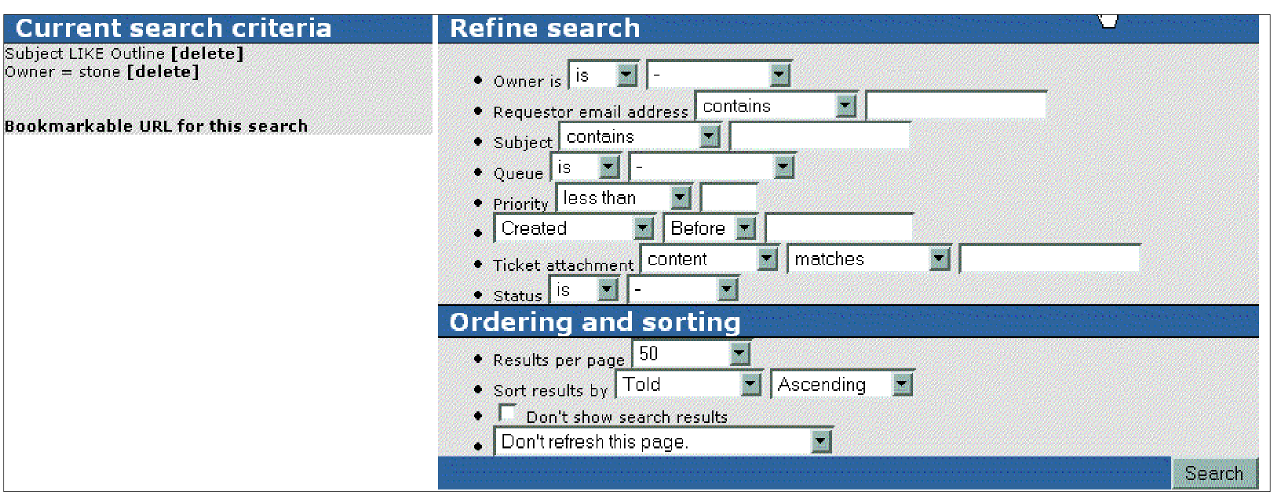



Figure 2 Refine Search

➢ *How do I change my password?*

1. Click **Configuration** on the left vertical navigation area, or click **Preferences** in the top right corner, as shown in Figure 1.

   *RT* displays the *Preferences/About me* screen, prefilled with your account information, as shown in Figure 3.You can modify various aspects of your account information from this screen.

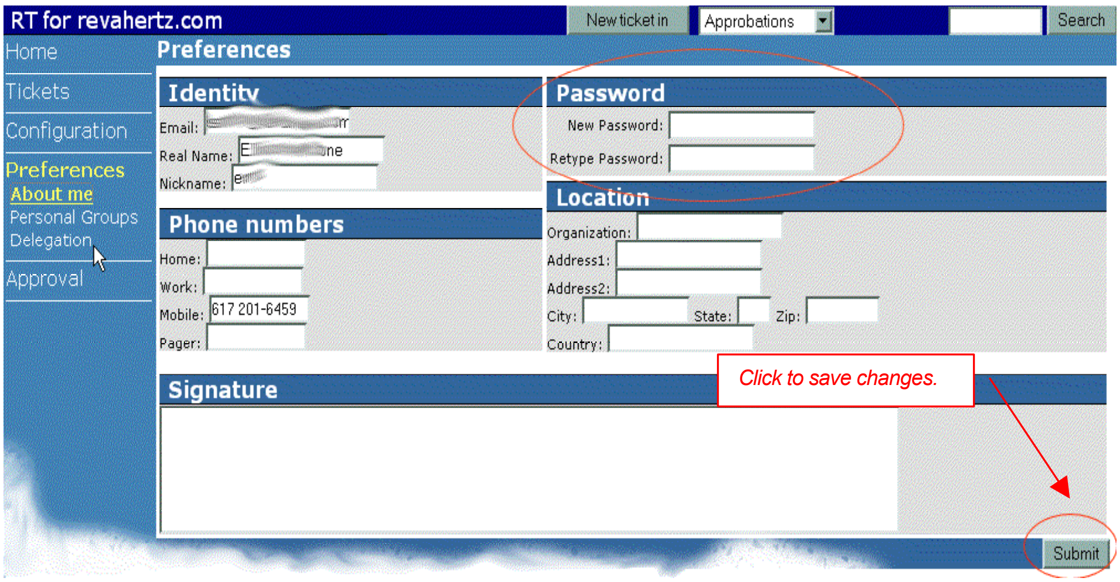



Figure 3 The *Preferences* screen

2. Click **Submit** to save your changes.

➢ *How can I display just my open tickets? Or all tickets associated with me as either requestor or owner? Can I create a report or a query?*

RT uses its **Search** interface to create queries. For example, to display all tickets where the **Owner** is *<yourname>* and the **Status** is not *Resolved*:

1. Click **Search** in the left Navigation area to open the *Find tickets* page.

   ⓘ If you have run a Search earlier in your RT session, clicking **Search** will re-run the same search. Instead, click **New Search** to open the *Find tickets* panel.

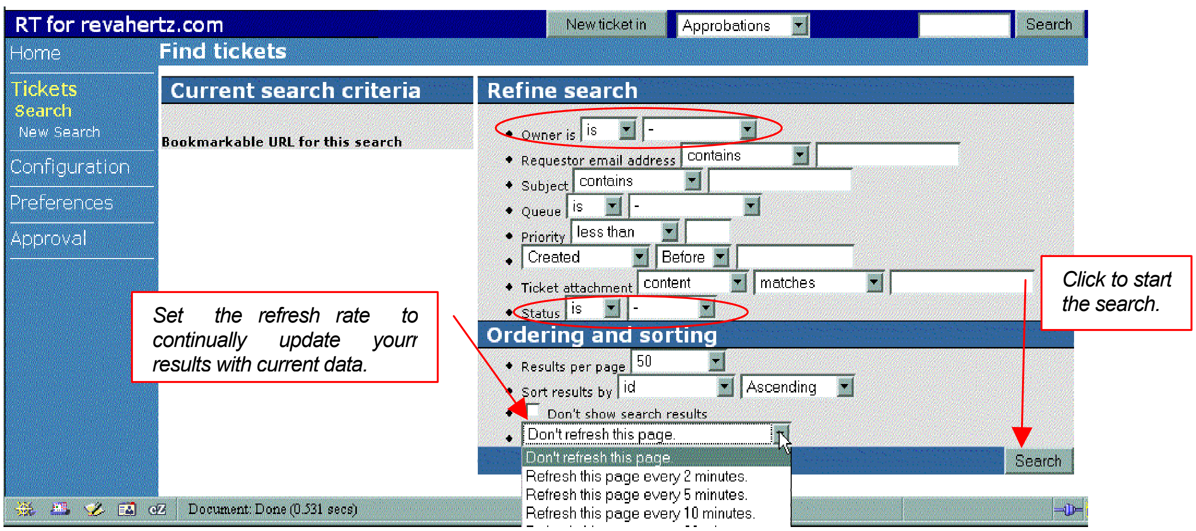



Figure 4 Find tickets

2. In the **Refine Search** area, and click **Status** and choose **`isn't`**.

3. Click the blank field next to **Status** and choose **`resolved`** from the drop-down list.

4. Click **Search** to run the search.

   RT displays a list of tickets assigned to you, with any status *except* `Resolved`.

   RT displays your current search criteria and the **Refine Search** panel at the bottom of every page of your list of tickets.

5. Click **Tickets** or **Search** from the Navigation area to the manually refresh the data.

6. To create a new Search, click **New Search**.

**More about Search**

Search in RT has some features worth noting:

- Searches, by default, are sticky. That is, if you return to the Search page during a session, it will repeat the most recent search.

- Searches are, by default, limited to 50 results per page.

- Searches are iterative – you can build them up. If you search for tickets owned by Jane, then search for open tickets, you'll get open tickets owned by Jane.

- Iterative searches can work with incompatible conditions, that is, x *OR* y. If you search for tickets owned by Jane, and then for tickets owned by Alice, you'll get tickets owned by Jane OR Alice.

- When RT displays multiple search results, it displays *Previous*, *Next*, *First*, and *Last* links at the bottom of each page for navigation.

- From the *RT at a glance page*, you can click on a queue name in **Quick Search** to retrieve all new and open tickets belonging to a designated queue, as shown in Figure 5. You can continue refining the results as needed.

- To search for a specific keyword, ticket number, or other short string, enter the search term in the Search text box in the upper right of the screen and click **Search**, as shown in Figure 5. Again, you can continue refining the results as needed.

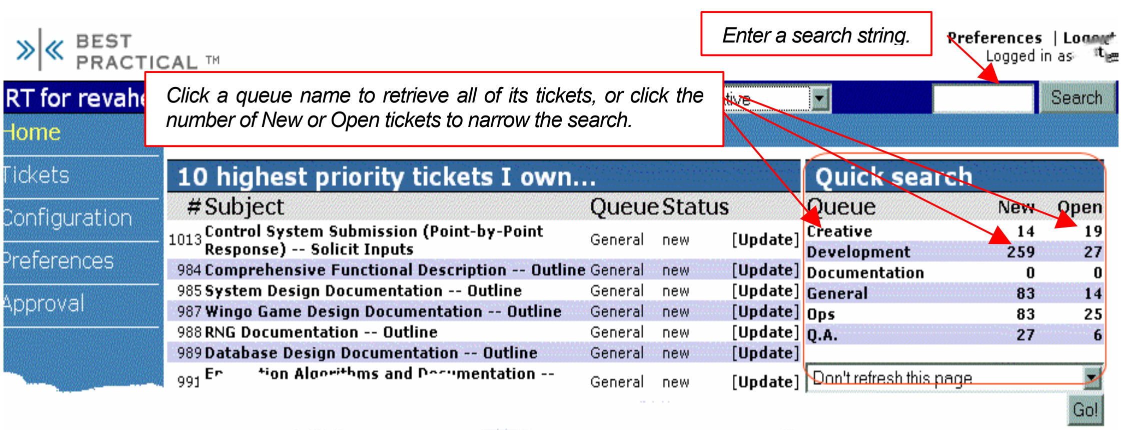



Figure 5 Search shortcuts

➢ *Can I create a report or a query?*

Instead of creating a SQL query to generate a report (as in *CVSTrac*), you create a "bookmarkable" URL from a Search, and save the URL as a bookmark.

To save a Search:

1. After you refine a search query to suit your needs, click *Bookmarkable URL for this search* under the *Current Search Criteria* panel, as shown in Figure 6.

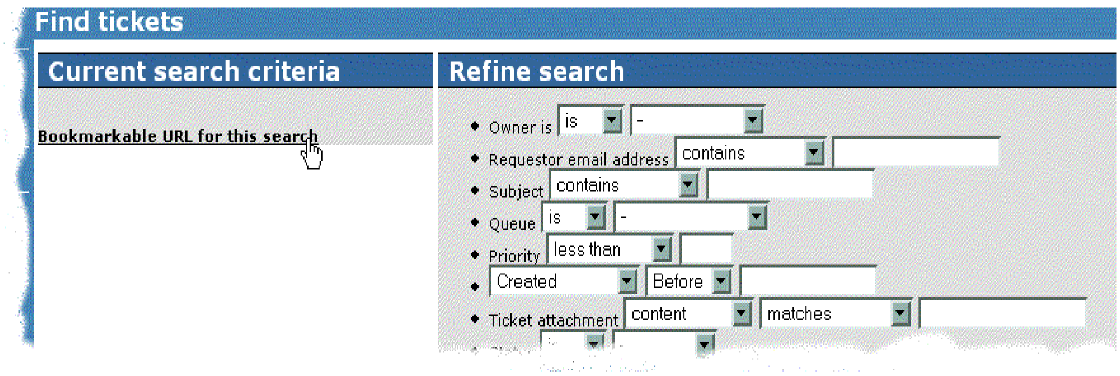



Figure 6 Create a Bookmarkable URL

RT loads your search query into a new (identical) page with a "bookmarkable" URL.

2. Use your browser to bookmark (and/or file) the URL so that you can re-use this search query later. The default bookmark name is *NN tickets found*. Rename it to something more meaningful.

3. Share search queries in the same way you can share any other bookmarked URL.

## Cheat Sheet

| To… | Do the following… |
|---|---|
| Create a new ticket | From the top of any page in RT, choose a queue from the drop-down menu and click **New ticket in**. |
| Retrieve tickets from a designated queue | |
| Refresh the data in your most recent search | Click **Search** again, or configure the refresh rate in the **Search** panel. |
| Open a ticket | From a list of tickets, click the subject line or ticket number of the ticket you want to open. |
| Expand the subsections (panels) of a ticket | Click the colored header bar of the panel, or click the appropriate term in the left Navigation area. Clicking **Jumbo** expands all panels of a ticket. |
| Add a dependency, a cross reference, or a hierarchical relationship (another ticket, or a URL) to a ticket | Open the ticket, and either click **Links** in the Navigation area, or click the **Relationships** title bar. |
| Change the status of a ticket | Open the ticket and, from the basic *Display* view, either click **Basic** in the **Navigation** area or click the **Basic** title bar. |

| | |
|---|---|
| Add a response to a ticket | From any view of an open ticket, click **Reply**, **Open**, **Take**, or **Comment** on the upper right corner of the ticket screen. See RT concepts for details on the difference between replies and comments. |
| Save a search query (in CVSTrac, called a report) | Create a search and click **Bookmarkable URL for this Search** under the *Current Search* panel. Use your browser to save the bookmark. |
| Sort the search data | Either click on the column label you want to sort by ( a second click reverses the sort order), or use the *Ordering and Sorting* subpanel of the *Search* panel. |
| Find the documentation for RT | Click on the **Best Practices** logo on any screen. It is linked to the Best Practices web site, and the documentation is available in PDF format on the Products page. |
| Attach one or more files to a ticket. | Either update, reply to, or comment on the ticket. There is a field for attachments in the update, reply, and comment forms (with a browse button for ease of use). |

## RT concepts

*lifted straight from the RT Manual for Version 3, and edited slightly*

| Term | Definition |
|---|---|
| **Ticket** | Central object in RT, the thing that needs to get done. Tickets have metadata attached to them such as an *owner*, *status*, and *queue.* |
| **Queue** | A line of tickets waiting to be worked on, but it's also, to some extent, the ticket's category. For instance, you might have the right to create, delete, and comment on tickets in the Foo queue, but only the right to comment on tickets in the Bar queue. |
| **History (of a ticket)** | Everything that's happened to a ticket. Facets of ticket history can include when the ticket was created, how it has changed, and any comments about it or replies to it. Like real history, ticket history cannot be changed (at least not without messing up the space-time continuum), so be aware that any comments you make about a ticket will be permanent. |
| **Updates** | Responses to a ticket, which can be either public or private:<br>• *Reply* a public remark that a requestor can see.<br>• *Comment* a private note for staff not visible to the requestor. This is useful when you want to be tactful but still convey important information, like, "This requestor is an investor, so be nice" or "This user's request mentioned his 'PC' but he really has a Mac." |
| **Priority** | The importance (urgency) of a ticket, represented by a numerical scale from 0-99. 99 is the highest priority. When you set a final priority, you can make a ticket's priority increase or decrease as its due date draws closer. The difference between 20. 50, and 75 may vary from organization to organization, but there should be an organizational policy to prevent every ticket getting assigned 99 by anxious users. |
| **Status** | Ways to classify the progress of a ticket's resolution (presented in a drop-down menu):<br>• *New* the ticket has just been created and hasn't been touched yet.<br>• *Open* the ticket is getting worked on |

| Term | Definition |
| --- | --- |
| | • *Stalled* due to circumstances beyond your control (waiting for the requestor to respond, waiting for the owner to return from Sri Lanka), the ticket isn't getting worked on right now. It will open again when someone adds a comment or reply.<br>• *Resolved* Work on the ticket has been completed.<br>• *Rejected* The ticket is not the staff's problem and is not going to be resolved, but is, for some reason, worth recording in the system. For instance, if an employee asks approval for something ridiculous, you can reject the ticket, but it will stay in the database as evidence that the employee makes silly requests.<br>• *Deleted* the ticket never should have been in the system -- it was spam, it was a list of passwords, it was porn, use your imagination -- and is now being zapped for good. |
| **Watcher** | Someone who is interested in a ticket. You'll find these filed under "People" when you're looking at a ticket. There are several types, or roles, of watchers:<br>• *Owner* The person responsible for the ticket and its resolution. Each ticket can have only one owner.<br>• *Requestor* The person or people who asked for something to get done; the ticket's reason for being.<br>• *Cc* Someone(s) who should get copies of any replies that go to the requestor. This might be the requestor's boss, sales rep, etc. This person will see the email but doesn't necessarily have the right to work on the ticket.<br>• *Admin Cc* Someone who receives copies of replies who also gets copies of comments, and generally are allowed to work on the ticket. We're hedging with words like "generally" and "necessarily" because any role can be assigned any right. |
| **Relationships** | Links from the ticket to something else; a relationship can exist between tickets, but you can also link tickets to external items like URLs or FedEx shipping numbers.<br>• *Depends on* A ticket can't be resolved unless another ticket is also resolved. The converse is depended on by.<br>• *Refers to* A ticket doesn't *need* the other ticket, but it would sure be useful for you to look at it. The converse is referred to by.<br>• *Parent* A big, general ticket ("Move house.").<br>• *Child* A subproject of a parent ("Hire movers." "Pack." "Eat pizza."). |
| **Custom fields** | Database fields that your organization can make up according to its needs. |
| **Scrips** | Custom notifications that will automatically take *Action X* in response to *Condition Y*. You can have RT notify the requestor when a ticket is resolved, for instance, or have RT page you when your boss submits a request |

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