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Guidance on responding to and managing tickets in the Request Tracker system https://rt.cesnet.cz

Basic information

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Authors

Institutions	First name and surname	ORCID	Email
Charles University	Lucie Hošková	0009-0001-9695-2342	lucie.hoskova@ruk.cuni.cz

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National Repository Platform for Research Data (NRP)
CESNET, zájmové sdružení právnických osob
Mailing Address: Gen. Píky 430/26, 160 00 Prague

Contents

1 Basic RT management

1.1 Navigating the RT queue

The RT system offers various ways to customise its home page. It is entirely up to you how you customise the interface, but we recommend keeping a list of all the queues you are actively managing somewhere on the home page.

Queues in which I am AdminCc

Queue	new	open	postponed	feedback
the name of your repository's queue	-	-	-	-

1.1.1 Editing the home page

How to customise the appearance of the home page, the layout of individual fields and features, and how to add or remove them is described in the sub-section ***Home page content***.

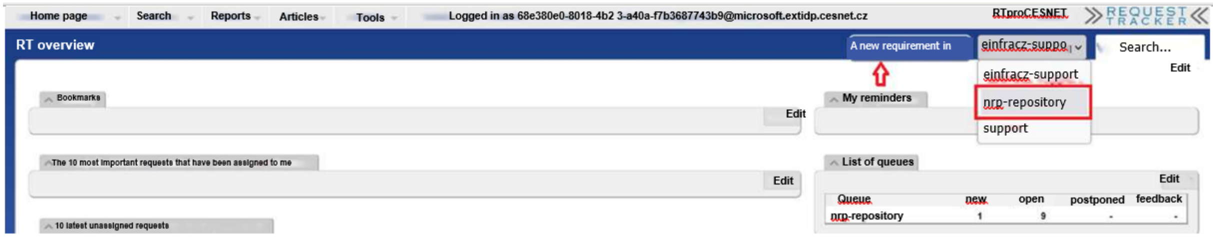
1.1.2 List of tickets in the queue

In each queue you will find all the request tickets for your system. The following image explains the header for each ticket.

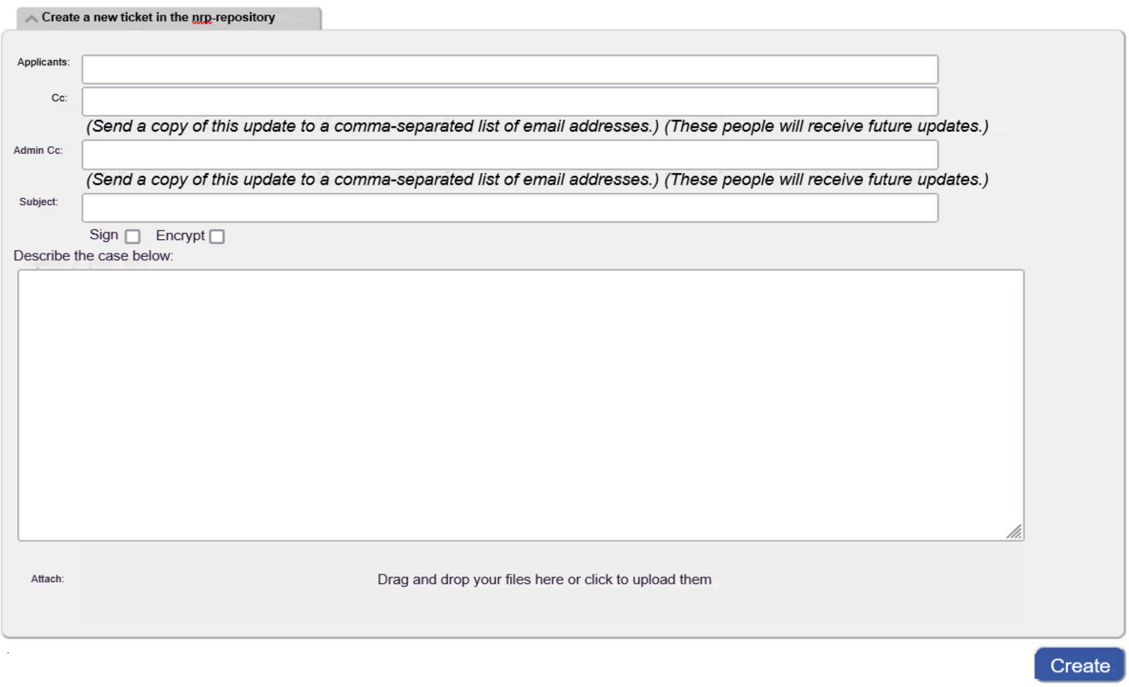
No.	Subject Applicant	Status Created	Queue Last contact	Owner Last updated	Priority Time remaining
ticket number	ticket title the applicant's name and email address	ticket status when the ticket was created in RT	queue name latest actions	Who is responsible for the latest actions	how many days to resolve the ticket

2 Creating a new ticket

A new ticket is created using the **New Request** function in the top right-hand corner of the screen. Do not forget to select the correct queue (in this case, *the nrp-repository* queue is used as an example).



A page will open where you can not only set the ticket title, the applicants and the recipients of updates, but **also send the users the first email message**, which will contain everything you enter in the *Describe the issue below* field*,* along with any attachments you add to the ticket. The text field options are described in more detail in the section ***Formatting text in a ticket***, how to add files to your ticket in ***Attachments – how to add them and where to find those sent to us***



2.1 Who is the ticket intended for

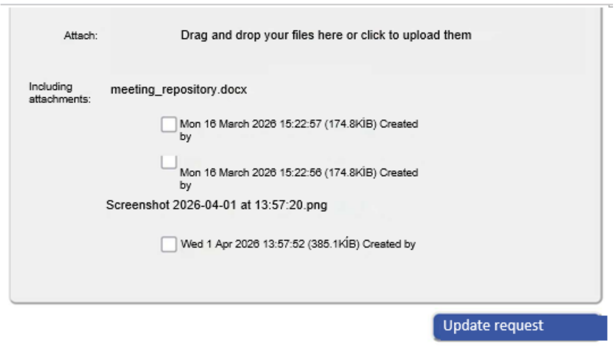
See ***User management***.

2.2 Setting the ticket title

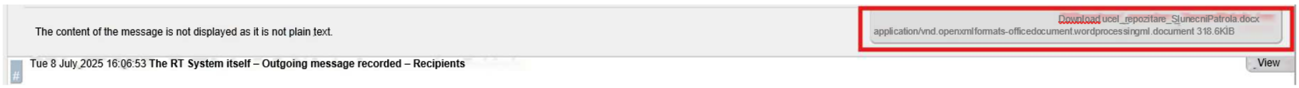
The contents of the **Subject** field will be used as the ticket title. The title can be edited at any time in the *Basic Details* > *Edit request* > *Subject* section. The action to change the subject within RT is visible only to AdminCc; no email is sent to applicants.

2.3 Attachments – how to add them and where to find those sent to us

You can attach files to a ticket using the *Attach* button just below the message text field. Any files that have been attached to or received in connection with a ticket in this way will subsequently appear in the list below the text field. If you want the attachment to be included in the message again, **you must tick the box**.



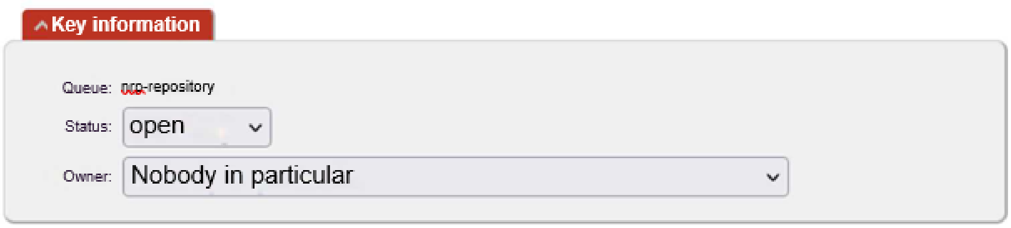
Attachments sent via RT queue can always be found in the *History* section of the message to which they were attached. It is always located **on the right-hand side, just below the message field itself**.



2.4 Setting the ticket status and owner

The ticket status indicates whether someone is already actively working on handling it. As we are creating this ticket inside the RT queue ourselves and will be further working on it, we will set its status to *Open*. You can find out more about ticket statuses in the section ***Change to the ticket*** status.

The owner of a ticket is the person responsible for it. Assigning the owner role does not grant you any new rights in RT; the role serves purely to show who is handling the ticket.



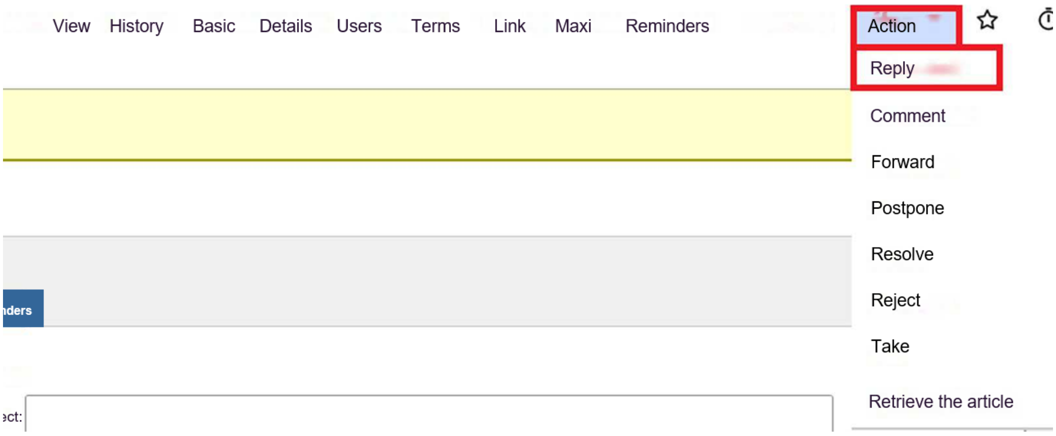
3 Response to a ticket

There are several ways to respond to a ticket; the most commonly used are Reply and Comment. **Reply sends an update to everyone** associated with the ticket, whilst **Comment simply adds an internal note to the ticket that is visible only to those with the AdminCc role**.

3.1 Reply

Tickets are always replied to using the **Reply** function. However, the RT queue allows for two possible responses.

1) Creating a new reply to a ticket using the *Action* > *Reply* option in the main menu



2) A reply to a specific message from the history, where the body of the email also contains the text of the message being replied to

If you want your reply to contain only the text you have just written, use the first option.

3.2 Comment

The options **for creating a comment** are in the same place as the options for the Reply action. The differences between the various options are the same as for Reply – selecting *Action* creates a new blank text field, whilst selecting a comment from history allows you to comment directly on a specific message.

3.3 What can I include in a response to a ticket?

The following actions can be performed in a reply: **filling in the text field with the reply itself, adding an attachment, assigning one-time CC recipients, and removing a user** from the conversation for that specific reply.

3.3.1 Formatting text in a ticket

The text field itself is, in its basic form, an RT queue in plain text, **with absolutely no formatting**. However, you can configure the settings so that you can use HTML to format your messages. You can find the setup procedure in the sub-section ***Editor_Options_Settings***.

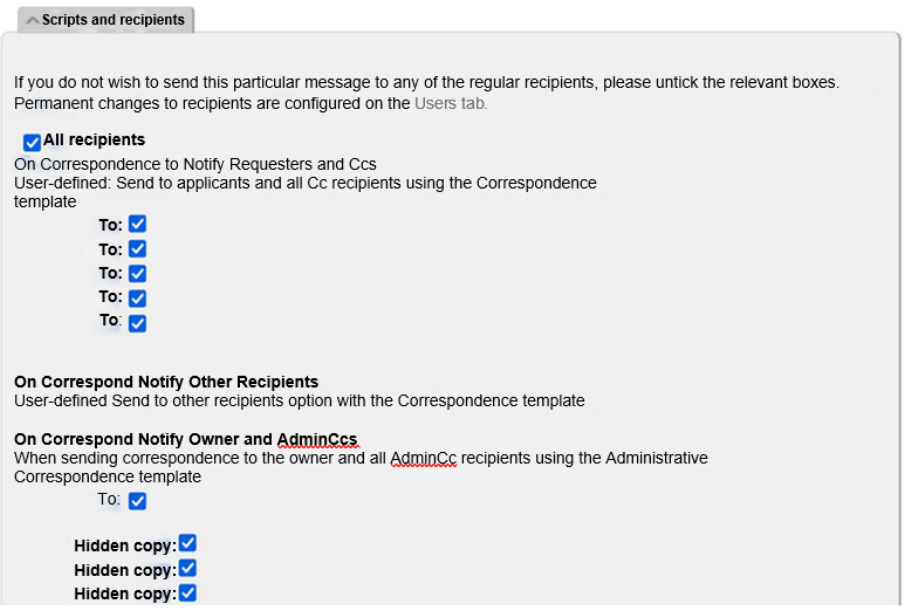
3.3.2 One-time addition of a message recipient

If you wish to send a new update to a ticket and, at the same time, **add another recipient specifically for this update**, use the One-time Cc field. People listed in this field will receive an email; they can reply to it, but they will not be notified by email of any further changes made to the ticket.

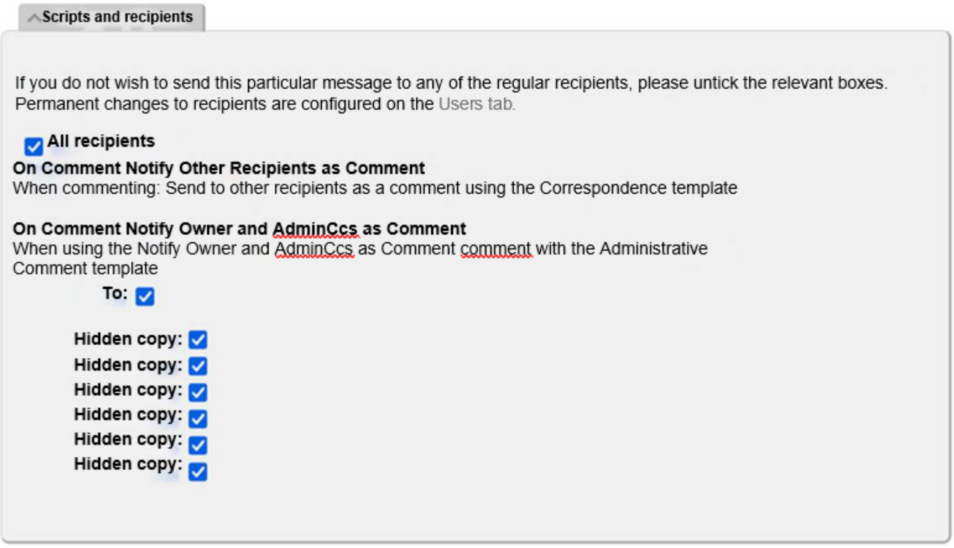
3.3.3 Removing participants from a ticket response

If you **do not** wish **a specific response to a ticket** to **be sent to a particular participant or participants** assigned to that ticket, **you can remove them when** in the *Scripts and Recipients* section, which can be found at the bottom of the response window.

For a Reply type of response, you can choose from Admin Cc, Applicants and standard Cc recipients.



This way, you can also delete a user from comment. Here you can see that, as mentioned in the section ***Comment***, this type of response is sent only to people with the AdminCc role.


Scripts and recipients
If you do not wish to send this particular message to any of the regular recipients, please untick the relevant boxes.
Permanent changes to recipients are configured on the Users tab.
All recipients
On Comment Notify Other Recipients as Comment
When commenting: Send to other recipients as a comment using the Correspondence template
On Comment Notify Owner and AdminCcs as Comment
When using the Notify Owner and AdminCcs as Comment comment with the Administrative Comment template
To:
Hidden copy:
Hidden copy:
Hidden copy:
Hidden copy:
Hidden copy:
Hidden copy:

4 User management

People who can interact with a ticket are called **users**. You can find a list of them on the ticket's main page or in the *Users* section of the menu.

4.1 Role

Every person who interacts with a ticket is assigned **a specific role**. Here is an overview of them:

Applicants: individuals who have created a ticket via the form on the repository's website, or who, when submitting a ticket manually, were designated as the main points of contact regarding the enquiry

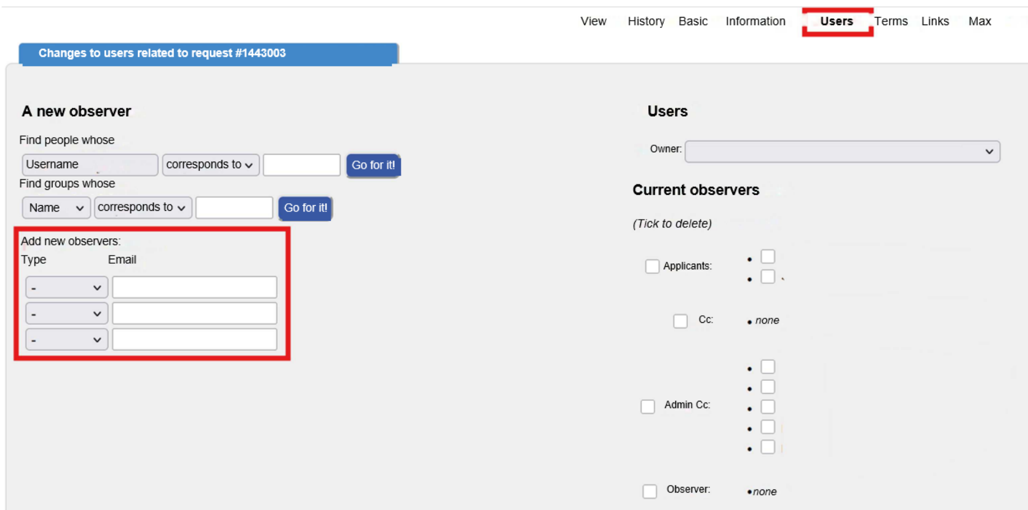
Cc: people who are part of the conversation but are not the main applicants

Owner: the person responsible for the ticket

AdminCc: users who can view the ticket and can edit it or reply to it in any way, regardless of their assigned role

4.2 Adding users to a ticket

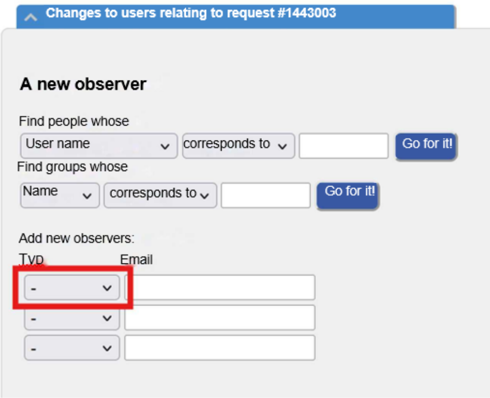
It is possible that, as the issue is being resolved, it will be necessary to add new users to the ticket. This is done in the *Users* section *at > Edit the users associated with the request*. You need to enter **the user's email address and specify what role the user will have in the ticket**.



4.3 Adding a person from an email copy

It may also be the case that, **in an email reply to a ticket, another person has been added to the copy to stay informed of developments regarding the ticket**. This person will see the email they were CC'd in, but **they will not see the reply that comes from the RT queue** – as mentioned, only those added as users can view the ticket.

If someone is added to the CC in this way, **their email address will appear in the New Observer section as a pre-filled field**. To add this to the users, simply **set the observer type** and save the changes.

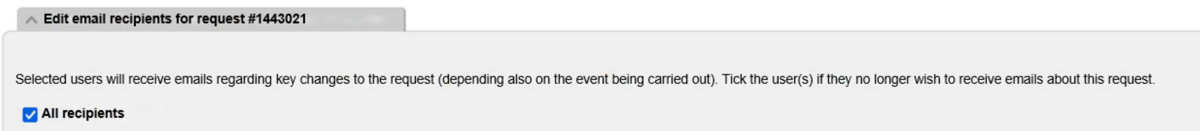


Should such a situation arise, a comment will automatically appear on the ticket to draw attention to this fact.

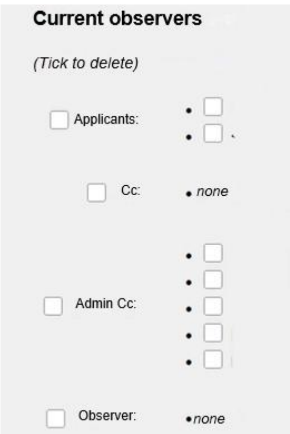
4.4 Removing users from a ticket or email correspondence

There are two ways to remove a user from a ticket.

If you wish for a user to retain access to a ticket in the RT queue but no longer receive emails about it, simply untick their name in the *Users* section > *Edit email recipients for the request*



If you wish to remove a user completely from a ticket, simply tick their name under *Users* > *Editing users associated with a request* > *Current observers.*



5 Ticket Management

5.1 Change to the ticket status

The ticket status provides **a** clear **overview of the stage the ticket is at in the resolution process**.

The ticket status can be changed at any time in the *Basic Details > Edit request > Status* section.

When the ticket status changes, all AdminCc recipients will receive a notification email.

5.2 Closing a ticket

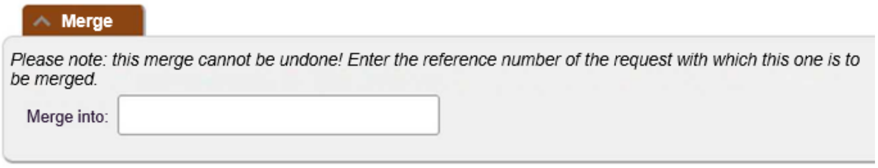
Once a ticket has been resolved, it needs to be closed. This is done via *Action* > *Resolve*.

5.3 Merging two tickets into one

It is possible that users will either change the subject line of their emails (deleting the ID number at the start of the subject line, which is used to assign the message to the correct ticket) and thereby create a new ticket, or they will forget about the correspondence altogether and contact you again. The result will be the same – **a new ticket will be created for an existing issue**. In such cases, **it is advisable to merge the tickets.** This is done as follows:

On the ticket's main page, you need to click on the *Links* field or select this option from the top menu.

Then, in the Merge section, enter the ticket number under which this ticket is to be merged. **Please note: this action cannot be undone!** The entire conversation will then be contained within a single ticket.



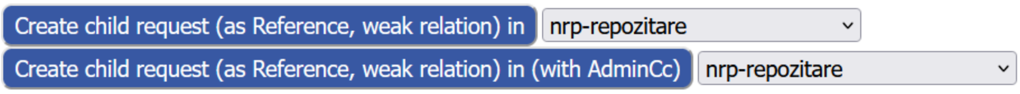
5.4 Moving a ticket between queues

There are two ways to pass tickets between queues. Guidance and a description of when it is appropriate to use each option can be found in the following two sub-sections. **Both options are located on the ticket's main page** and can be selected by clicking on the blue field containing the description of the action.

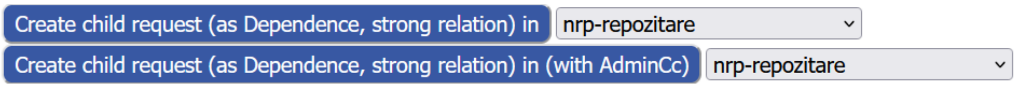
5.4.1 Whilst retaining the original ticket and forwarding only a "copy"

If **you wish to keep the original ticket in your queue** and simply pass a new ticket to another RT queue, containing details of the issue to be resolved and the applicant's contact details, you need to create what is known as **a "child" ticket**. This ticket is then retained in the system as dependent on your original "parent" ticket. When creating a ticket, you can either select the option with AdminCc, in which case you will be added to the AdminCc list for this new ticket, or you can simply move it without assigning yourself any roles (and the associated features) other than being on the Cc list.

If you want to allow the second RT queue to **resolve and close the child ticket even though the parent ticket is still being dealt with**, use the Reference type.

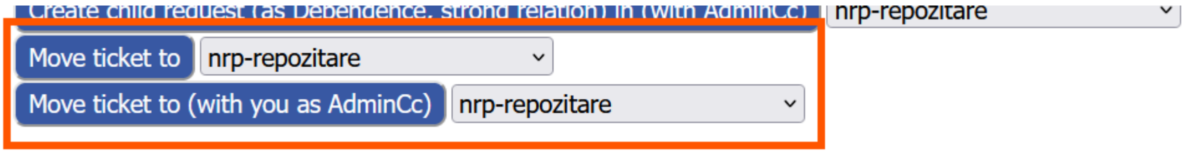


If you want to **ensure** that child tickets **cannot be closed before your original parent ticket has been resolved,** use the Dependence option.



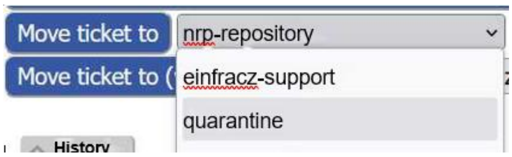
5.4.2 With the ticket being moved entirely to another queue

If **you simply want to move a ticket to a different queue** – for example, because the applicant has selected the wrong RT queue – use the **Move ticket to** function. Once again, you can decide whether you still wish to act as AdminCc for this ticket or not.



5.5 Spam tickets

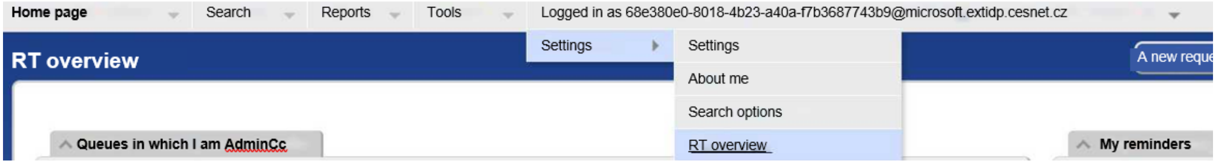
It may happen that spam tickets end up in the RT queue. In that case, please move them to the RT quarantine queue.



6 RT queue user interface settings

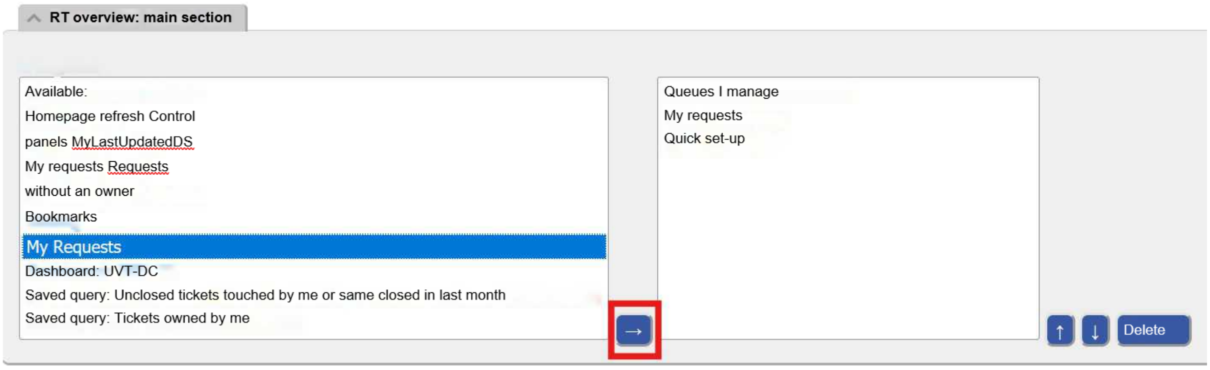
6.1 Home page content

You can customise the appearance and content of the home page in the *Settings > RT overview* section.

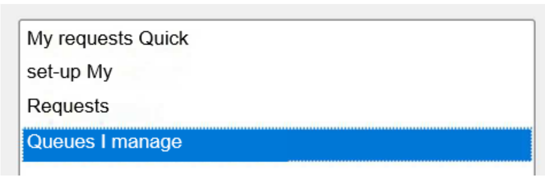


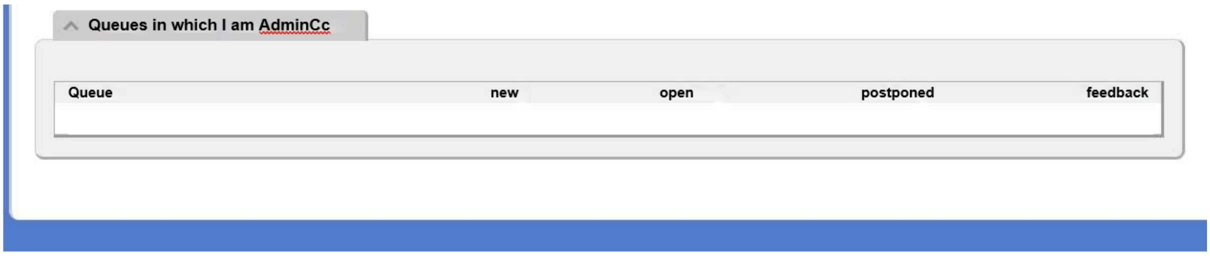
Here you can configure which features will be displayed in the main panel and the sidebar.

You can **add** them by selecting them from the list on the left and then clicking the arrow, which will move them to the list of actively used features on the main page on the right.

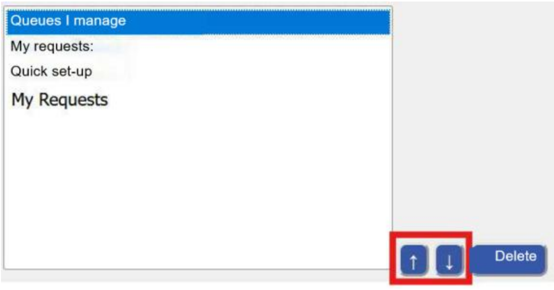


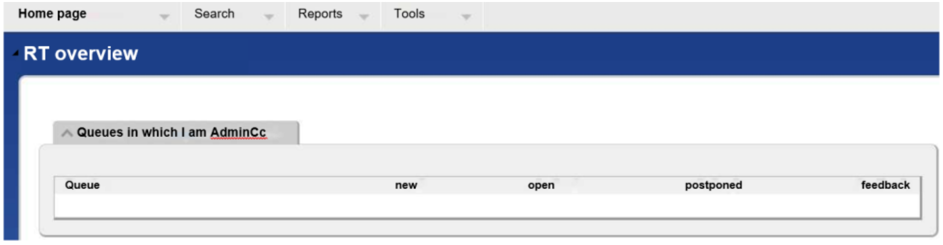
You can also **change where they appear on the page** – their position in the list determines their position on the home page. For example, at the moment, the *Queues*, *for which I am the AdminCc* feature is located right at the bottom of the page:



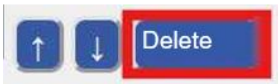


However, I would like them to appear right at the top of the home page. So, using the up/down arrows, I move the feature to the top:





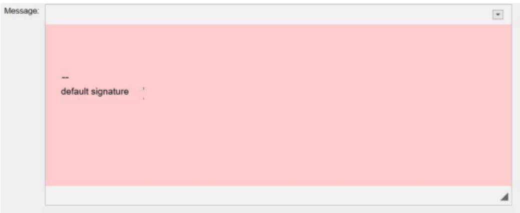
You can also **remove** the feature from the active list **.**



6.2 Signature

It is possible to set up an automatic signature. You can do this in the *Settings > About me > signature* section.

The signature you have set up will then automatically appear in the text field of the ticket message.

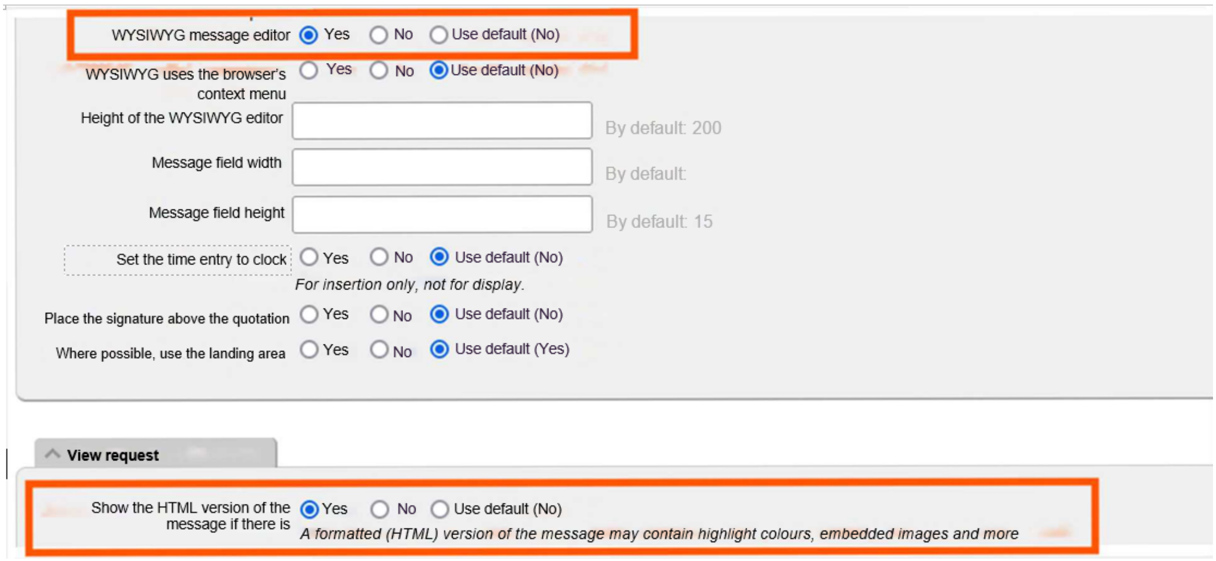


6.3 Setting the request message editor options

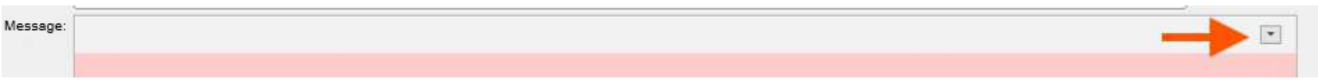
Although replies to tickets are generally in plain text, **it is possible to enable the HTML editor.** You can find the option to enable this in *Settings > Settings > Creating a request > WYSIWYG editor.*

Here you need to tick the *Yes* option.

Next, you also need to enable *Show HTML version of the page if it exists > Yes* in the Request view.



Once you have enabled these options, the following drop-down menu will appear in the ticket.



This includes all the possible changes you can make in the management section.