

Simplifying Your IT Helpdesk with Request Tracker

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Abstract

Today's IT Worker receives work requests from a variety of sources; cell phones, desk phones, email, voicemail, even verbal communication at the office water cooler. Tracking, prioritizing and resolving helpdesk requests can become a nightmare without a central point of reference for all requests. Request Tracker (RT), an open source, cross-platform ticketing system provides centralized management of work requests using the familiar interfaces of email and the web. This session will share our experience in switching to RT for helpdesk management and will demonstrate the capabilities RT.

* RT is a product of Best Practical Solutions <http://www.bestpractical.com/rt>



Helpdesk Requests arrive from a variety of sources.

In order to become efficient, IT Helpdesks need a central place to store all requests so that they can easily be evaluated, prioritized, updated and tracked.

What we needed in a Helpdesk Package:

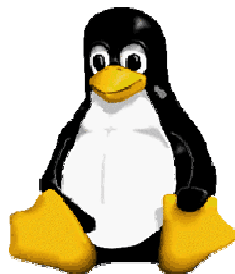
- ⊗ Provide a central place to detail all work request
- ⊗ Flexible work flow and customizations
- ⊗ Available wherever a user or helpdesk staff may be (web based)
- ⊗ Reliable (You can't submit work requests saying the work request system is down)
- ⊗ Simple for end users to utilize
- ⊗ Cheap or free
- ⊗ Reporting features
- ⊗ Integrates well with existing network architecture

What RT provides:

- ⊗ Work requests and metadata are stored in an SQL database
- ⊗ Open-Source software means customization possibilities are numerous
- ⊗ Web based interface is accessible from any web browser (IE, Firefox, etc)
- ⊗ LAMP architecture provides a reliable, fast solution that "just works" once it's up and running
- ⊗ End User interface can be %100 email based, an application even the least techie users know
- ⊗ Free to use and modify
- ⊗ Basic search and reporting features, SQL backend makes further reporting options available
- ⊗ User accounts are autocreated once they submit a request. Accounts can be restricted or tied to an LDAP server. RT works with most existing email servers, especially well with open source servers like Sendmail, Postfix and Courier-MTA

RT is based on the L.A.M.P. Platform:

Linux Operating System



Apache Web Server



MySQL database server



Perl Scripting Language



Since RT is built upon free and open source software, it is easy to build and maintain a reliable and highly customizable system. While LAMP is the recommended platform for RT, some of these options can be swapped for alternatives, for example, a Windows machine can be used in place of Linux for the Operating System or Oracle can be used in place of MySQL for the database server. This gives the administrator a great deal of freedom and choice in putting together a platform to run RT.

RT at a glance - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

https://rt.pbu.edu/rt/index.html?HomeRefreshInterval=120

BEST PRACTICAL™

Preferences | Logout
Logged in as jlee

RT for Work Order New ticket in IT Search

Home RT at a glance

Tickets

RTFM

Tools

Configuration

Preferences

Approval

X 10 highest priority tickets I own...

#	Subject	Priority	Queue	Status
394	Report from the fundware server doesn't print as previewed	50	IT	new
2431	Student Theological Society Intranet page	50	IT	new
2332	e-mail list of all Advance Students needed!	50	IT	open
2002	Computers not working in Heritage	50	IT	new
1865	"A" Drive and DVD / DVD Burner	50	IT	open
1854	Lisa's having trouble	50	IT	new
1814	V-Drive Login	50	IT	open
1606	RA folder on Intranet	50	IT	new
1225	My computer shuts down when I put in a flash drive/memory stick	50	IT	open
1222	Steve Moyer	50	IT	open

X Quick search

Queue	New	Open
IT	37	58

Refresh this page every 2 minutes. Go!

X 10 newest unowned tickets...

#	Subject	Queue	Status	Created	Take
2481	(No subject)	IT	new	2 hours ago	Take
2473	computer log in	IT	open	23 hours ago	Take
2440	Monitor	IT	new	7 days ago	Take
2428	cannot access drives	IT	open	8 days ago	Take
2418	Problem with envelope format	IT	new	9 days ago	Take
2284	MAC Computer	IT	new	3 weeks ago	Take
2153	Printer problem	IT	new	6 weeks ago	Take
1268	requesting EXCEL	IT	open	5 months ago	Take

X Quick ticket creation

Subject: Queue: Owner: IT jlee

Create

https://rt.pbu.edu/rt/Ticket/Display.html?id=2332 rt.pbu.edu

RT's Default Homepage

To the left:

- Home – You are here
- Tickets – Search for existing tickets using an SQL like syntax
- RTFM – “RT Faq Manager” Addon module to RT for knowledgebase
- Tools – Additional Features
- Configuration – Customize RT Actions, responses, users, etc
- Preferences – User settings (name, email, etc)

10 Highest Priority Tickets I own – provides a quick summary of tickets you have taken or been assigned.

10 Newest Unowned tickets – see what new helpdesk requests are coming in

Quick Search – Overview of New (no helpdesk response yet) tickets and open (not resolved yet) tickets

The screenshot shows a Mozilla Firefox browser window displaying the RT (Request Tracker) web interface. The browser's address bar shows the URL: <https://rt.pbu.edu/rt/Ticket/Display.html?id=394#>. The page title is "#394: Report from the fundware server doesn't print as previewed". The interface includes a navigation menu on the left with options like "Home", "Tickets", "RTFM", "Tools", "Configuration", "Preferences", and "Approval". The main content area displays ticket metadata, including ID (394), status (new), priority (50/70), and queue (IT). It also shows the ticket history, with the first entry being "Ticket created" on Mon Aug 08 15:50:49 2005 by TRobb@pbu.edu. The ticket description states: "The fundware server has a little program on it which will print reports on restricted, agency and endowment accounts. The reports do not print as previewed. They are expanded and unusable. Please fix. I can demonstrate this problem at your convenience. My IP address is 10.1.3.3. thanks/Ted". The interface also includes a search bar, a "New ticket in" dropdown, and a "Display mode" selector.

Viewing A Ticket:

The Basics – Ticket #, Status, Priority and Subject

People – Who created the ticket, Who owns the ticket and Who's watching the ticket

Dates – Creation, Start and Finish dates of ticket

Links – Ticket association with other tickets (depends on, merge 2 tickets, etc)

More about requestor – Shows other tickets user has previously submitted for quick Reference.

Ticket History – Shows initial request of user and any further correspondence. Email replies are automatically appended to history, Helpdesk staff can reply to user or they can comment on the ticket, comments are not seen by the end user.

The Good, the Bad and the Ugly, our experience using RT for one year:

The Good:

- ⊗ Most end users found that submitting work orders via email was easier than using a special application.
- ⊗ Web based interface for helpdesk staff allowed them to check work orders from kiosk machines, end user workstations, Linux and Macs
- ⊗ Fast performance meant some work orders were resolved within minutes of request
- ⊗ SQL backend offers more powerful search capabilities

The Bad:

- ⊗ End users couldn't track work order or find out history of work order if they deleted work order emails (need to open web interface to end users)
- ⊗ Perl based installation can be difficult to install, and upgrade, generally stable if you don't touch anything though.
- ⊗ RTFM knowledgebase module needs a lot of work
- ⊗ Searching for tickets can be complicated

The Ugly:

- ⊗ Web Interface could use some cleanup; need to be able to hide non-relevant data. For example, we don't use priority field or links that much
- ⊗ Emails can get very long and difficult to follow when users quote text in replies