# RT/CSCF/MFCF –RT 4.4 and onboarding

## May 23, 2017

Action

1. Yellow highlighted items below
2. Lisa : send new URL/agenda link etc to project team
3. Robyn: look into MFCF needs and timelines for go live
   1. Queues
   2. Access/permissions
   3. Custom fields
   4. Training for staff about a month after go live
   5. Forms

Agenda:

1. Work left to be completed (RTs created; owners assigned; priority clear)
   1. 591608: [CSCF-RT44upgrade] Custom Roles implemented for CSCF\* and MFCF\* queues [open] (javoskam (Jeff Voskamp))
   2. Can revise charter to remove this as a requirement for closure:
      1. • 591610: [CSCF-RT44upgrade] Validation callback [open] (javoskam (Jeff Voskamp))
2. Closure:
   1. Review [project charter deliverables](https://sharepoint.uwaterloo.ca/sites/IST/CS/RT/RT44Planning/RT44Upgrade-ProjectMgmtDocuments/RT4.4-ProjectCharter.docx)
   2. Future changes/features/development- recommendations
      1. Process for communication between CSCF/MFCF and IST re: bug fixes, feature requests from Best Practical, development , etc.
      2. Campus RT group
         1. Training
            1. SEW: issue solver and requestor training
            2. PDAG: key areas of RT … e.g. searches, bulk updates (and send reply to all tickets with same dependencies) and dashboards; general QA (bring yoru RT ?S ideas, pain points , tips, awesome featurs, suggestions etc. )
            3. Special request
            4. FACCUS session
            5. RT session with agenda .. bring snacks …
            6. Etc.
         2. Feature requests
         3. Collaborative development
         4. Mailing list for RT collaboration and communication
3. Lessons learned:
   1. what problems occurred and how those problems were handled and may be avoided in the future.
      1. No problems ..just questions/inquiries
      2. Access to SP dcouments ..esp after move of SP site
   2. what went well with the project/program and why
      1. IST oversight very adequate; minimal issue
      2. Great collaboration between IST and CSCF/MFCF
         1. Enough IST resources to meet/exceed goals
         2. Manageable set up deliverables
         3. Willingness on IST’s part to be flexible and accommodate/accomplish new features
      3. Adapting other timelines to meet timelines of CSCF
      4. In-house Vendor training that included IT staff from business units
      5. PM
         1. IST – RT side
         2. CSCF – migration from ST to RT side
      6. \*Feature requests triaged through key CSCF staff before being passed to IST
      7. \*Including a few key people form business unit (CSCF) in planning units
   3. key findings from the lessons learned effort for use on other projects/programs.
      1. See \* above
      2. Any project that can improve collaboration between IST and other campus units ..is a big win
   4. Identify major issues and potential impacts of each that should be considered in the future.
      1. None ideintifed
4. Next steps
   1. Survey (?)..not needed at this point
   2. Complete Lessons Learned and Closure documents and send to project team and sponsors (Lisa)
   3. Other:
      1. Future changes/features/development

## April 20, 2017

1. Action items this meeting
2. Action items last meeting (review all; **bolded items need updates**)
   1. Daniel (for MFCF/CSCF) to advise Lisa/Jeff about custom roles:
      1. Done: What would you like created for custom roles and supply to Jeff/Lisa
      2. Done: What would you like to happen with people in non-standard roles, if ticket moved to non-CSCF/MFCF queues
         1. Nothing will be done automatically
      3. Done: Send Lisa CF info when it is ready
   2. Jeff/Lisa/Daniel
      1. MFCF/CSCF customizations – prep ahead of time for go live (use ‘initial data’ or document what needs to be done the week between Apr 22 and May 1):
         1. **Custom roles (Jeff with input from MFCF/CSCF)**
         2. Done: New queues/CFs (Lisa has this info already from Daniel and can create in live RT)
            1. Lisa CF info from Jeff
         3. **(could happen may 5th ish if nec) DB query for time worked (Daniel to do; Jeff to put in place for testing)**
         4. **‘Summary (wiki)’ CF text area to change CSS to be larger (Daniel, and Jeff to implement for testing)**
         5. **If possible for May 1:**
            1. **Validation callback for warning if hostname doesn’t resolve in DNS (hostname CF)**
   3. **(not done but perhaps CSCF will do internally) CSCF – send Lisa best practises for training**
   4. Done: Lisa to prep for training
      1. All queues, fields (CFs) permissions ready
      2. Ask Jeff to populate rt44-test with new queues etc.
      3. IF possible get custom roles ready on rt44-test for training
      4. Dependant ticket
         1. Where it makes sense, change requestor of dependant ticket to be owner of main ticket
      5. Get process/best practises info from CSCF
   5. Done: Lisa to add AdminCC functionalyt for all RT (to get all emails owner does ) and comm this to RT users
   6. Done: Lisa to put CSCF and MFCF staff in global IT staff group in RT for access to –general- queue and IST-CS\* queues
   7. Done: Jeff/Lisa block off time for RT prep in advance
      1. Done: And review internal IST RT upgrade notes: [https://sharepoint.uwaterloo.ca/sites/rt4/RT44Planning/UpgradePlanning/RT44Planing2017.docx](https://sharepoint.uwaterloo.ca/sites/IST/CS/RT/RT44Planning/UpgradePlanning/RT44Planing2017.docx)
   8. **All: test as per below**
   9. **In RT** [**https://rt.uwaterloo.ca/Ticket/Display.html?id=588530**](https://rt.uwaterloo.ca/Ticket/Display.html?id=588530) **: Lisa ask about mobile instance to be preference and/or put link about not using a mobile browser at the top of the mobile version**
3. All to test (as below) using: [https://sharepoint.uwaterloo.ca/sites/rt4/RT44Planning/UpgradePlanning/GoLiveRT4TestingMar-Apr2017.docx](https://sharepoint.uwaterloo.ca/sites/IST/CS/RT/RT44Planning/UpgradePlanning/GoLiveRT4TestingMar-Apr2017.docx) coordinate testing for browsers and queues
   1. Done: Safari (robyn)
   2. **IE (Lawrence)**
   3. **Done: Chrome Linux (jeff)**
   4. Done: Chrome windows (lisa)
   5. **Done: Chrome mac (Daniel)**
   6. **Edge (Lawrence)**
   7. Done: FireFox Linux (robyn)
   8. **Firefox windows (Lawrence)**
   9. **Done: Firefox mac (Robyn)**
   10. **Done: android (jeff)**
   11. **Done: Iphone (Daniel)**
   12. **BB (lisa )**
4. RT upgrade Master ticket: <https://rt.uwaterloo.ca/Ticket/Display.html?id=585452>
5. RT features for CSCF for May 1 Master ticket: [591606: [CSCF-RT44upgrade] May 1, 2017 Master ticket [new]](https://rt.uwaterloo.ca/Ticket/Display.html?id=591606) ([ltomalty (Lisa Tomalty)](https://rt.uwaterloo.ca/User/Summary.html?id=6058))
   1. April:
      1. [591612: [CSCF-RT44upgrade]Training: Apr 12 and Apr 26 [new]](https://rt.uwaterloo.ca/Ticket/Display.html?id=591612) ([ltomalty (Lisa Tomalty)](https://rt.uwaterloo.ca/User/Summary.html?id=6058))
   2. For May 1:
      1. [591608: [CSCF-RT44upgrade] Custom Roles implemented for CSCF\* and MFCF\* queues [new]](https://rt.uwaterloo.ca/Ticket/Display.html?id=591608) ([javoskam (Jeff Voskamp)](https://rt.uwaterloo.ca/User/Summary.html?id=4354))
      2. [591497: [CSCF-RT44upgrade] apply Daniel's CSS to CF: 416 Summary (Wiki) (applied to cscf queues) [new]](https://rt.uwaterloo.ca/Ticket/Display.html?id=591497) ([javoskam (Jeff Voskamp)](https://rt.uwaterloo.ca/User/Summary.html?id=4354))
   3. For May 1 (if possible):
      1. [591610: [CSCF-RT44upgrade] Validation callback [new]](https://rt.uwaterloo.ca/Ticket/Display.html?id=591610) ([javoskam (Jeff Voskamp)](https://rt.uwaterloo.ca/User/Summary.html?id=4354))
   4. For May 5:
      1. [591481: [CSCF-RT44upgrade] time reporting work for Daniel [new]](https://rt.uwaterloo.ca/Ticket/Display.html?id=591481) ([javoskam (Jeff Voskamp)](https://rt.uwaterloo.ca/User/Summary.html?id=4354))
      2. [591609: [CSCF-RT44upgrade] DB query for time worked [new]](https://rt.uwaterloo.ca/Ticket/Display.html?id=591609) ([javoskam (Jeff Voskamp)](https://rt.uwaterloo.ca/User/Summary.html?id=4354))

## Tues Mar 21, 2017

1. Action items this meeting
   1. Daniel (for MFCF/CSCF) to advise Lisa/Jeff about custom roles:
      1. Done: What would you like created for custom roles and supply to Jeff/Lisa
      2. **What would you like to happen with people in non-standard roles, if ticket moved to non-CSCF/MFCF queues**
      3. Done: Send Lisa CF info when it is ready
   2. Jeff/Lisa/Daniel
      1. MFCF/CSCF customizations – prep ahead of time for go live (use ‘initial data’ or document what needs to be done the week between Apr 22 and May 1):
         1. **Custom roles (Jeff with input from MFCF/CSCF)**
         2. Done: New queues/CFs (Lisa has this info already from Daniel and can create in live RT)
            1. Lisa CF info from Jeff
         3. **(could happen may 5th ish if nec) DB query for time worked (Daniel to do; Jeff to put in place for testing)**
         4. **‘Summary’ CF text area to change CSS to be larger (Daniel, and Jeff to implement for testing)**
         5. **If possible for May 1:**
            1. **Validation callback for warning if hostname doesn’t resolve in DNS (hostname CF)**
   3. (not done but perhaps CSCF will do internally) CSCF – send Lisa best practises for training
   4. Done: Lisa to prep for training
      1. All queues, fields (CFs) permissions ready
      2. Ask Jeff to populate rt44-test with new queues etc.
      3. IF possible get custom roles ready on rt44-test for training
      4. Dependant ticket
         1. Where it makes sense, change requestor of dependant ticket to be owner of main ticket
      5. Get process/best practises info from CSCF
   5. Done: Lisa to add AdminCC functionalyt for all RT (to get all emails owner does ) and comm this to RT users
   6. Done: Lisa to put CSCF and MFCF staff in global IT staff group in RT for access to –general- queue and IST-CS\* queues
   7. Jeff/Lisa block off time for RT prep in advance
      1. Done: And review internal IST RT upgrade notes: [https://sharepoint.uwaterloo.ca/sites/rt4/RT44Planning/UpgradePlanning/RT44Planing2017.docx](https://sharepoint.uwaterloo.ca/sites/IST/CS/RT/RT44Planning/UpgradePlanning/RT44Planing2017.docx)
   8. All: test as per below
   9. In RT <https://rt.uwaterloo.ca/Ticket/Display.html?id=588530> : Lisa ask about mobile instance to be preference and/or put link about not using a mobile browser at the top of the mobile version
2. Review action items from last meeting
   1. Custom roles and IST (Lisa)
   2. Notes from Best Practical about moving tickets from one queue to another if a role doesn’t exist in the other queue
      1. There is no default functionality to map custom roles from one ticket to some other role in a different queue where the custom role isn't available. You could build a scrip to check for that condition and add the roles "On Queue Change" if it seemed appropriate.
      2. If you move a ticket from Queue A to B, then move it back, the custom roles are restored. This is similar to how custom fields work. This is helpful if a ticket is moved accidentally since you don't lose all of your data.
      3. One other interesting case I tested is a ticket moving from A to B, and B doesn't have the custom role. If the custom role is applied to B after the move, the members then show up. Whether this is desirable probably depends on your use case.
   3. All to test (as below) using: [https://sharepoint.uwaterloo.ca/sites/rt4/RT44Planning/UpgradePlanning/GoLiveRT4TestingMar-Apr2017.docx](https://sharepoint.uwaterloo.ca/sites/IST/CS/RT/RT44Planning/UpgradePlanning/GoLiveRT4TestingMar-Apr2017.docx) coordinate testing for browsers and queues
      1. Safari (robyn)
      2. IE (Lawrence)
      3. Chrome Linux (jeff)
      4. Done: Chrome windows (lisa)
      5. Chrome mac (Daniel)
      6. Edge (Lawrence)
      7. FireFox Linux (robyn)
      8. Firefox windows (Lawrence)
      9. Firefox mac (Daniel)
      10. android (jeff)
      11. Iphone (Daniel)
      12. BB (lisa )
3. Discuss items from: <https://cs.uwaterloo.ca/twiki/view/CF/STToRTInvestigationStaffMeetingPresentation20170216#QA> ;
4. Change request list from Daniel
   1. Review to see what is ready and what requires IST time
   2. Add this to our agenda for future meetings as well

## March 8 2017

Attendees:

### Action items

1. Done: Lisa/Jeff/Jennifer: turn rt 4.4 planning doc into a tree of RTs (or work break down structure?) to track them
   1. Preface subject of all tickets with “RT44upgrade”. Master ticket: <https://rt.uwaterloo.ca/Ticket/Display.html?id=585452>
   2. Goal: Apr 22 (sat)
2. All to test (as below) using: [https://sharepoint.uwaterloo.ca/sites/rt4/RT44Planning/UpgradePlanning/GoLiveRT4TestingMar-Apr2017.docx](https://sharepoint.uwaterloo.ca/sites/IST/CS/RT/RT44Planning/UpgradePlanning/GoLiveRT4TestingMar-Apr2017.docx) coordinate testing for browsers and queues
   1. Safari (robyn)
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   4. Chrome windows (lisa)
   5. Chrome mac (Daniel)
   6. Edge (Lawrence)
   7. FireFox Linux (robyn)
   8. Firefox windows (Lawrence)
   9. Firefox mac (Daniel)
   10. android (jeff)
   11. Iphone (Daniel)
   12. BB (lisa )
3. DONE: Lisa set up perm on ‘test’ machine for everyone in rt-test queue and add cscfhelp to this too…
4. Scheduling training
   1. Apr 12 – AM ..lawrence to book
5. Lawrence to book rooms for 2 training sessions
6. Implement (Jeff/Daniel)….. by March 20th….
   1. pull time worked data from rt4.4 – Update: yes possible, need to review requirements, security and how
   2. see table below and delegate as appropriate
7. CSCF to request queues and Custom Fields (for each queue) needed to be set up now in RT 4.2 and 4.4 by March 31st
8. MFCF to request queues and Custom Fields (for each queue) needed to be set up in RT 4.4 when ready to test
9. MFCF/CSCF to discuss custom role requirements and bring to next meeting:
   1. Custom roles
      1. Built in
         1. Owner RESPONSIBLE (single value field)
         2. CC
         3. Requestor
      2. AdminCC INFORMED … emailed of all transactions (like ‘owner’)
         1. Kept informed but not expected to do anything
      3. \*NEW\* ‘Supporters’ role SUPPORTING (from RASI acronym)
         1. All same as ‘owner’ ..for notifictions
         2. They are expected to do some work but are not responsible
         3. Add input etc ….
      4. \*NEW\* ‘Accountable’ role … gets all same email as owners
         1. Currently it is queue owner….
      5. ????/look into
         1. Any new roles : add desc beside name so ppl know email generated if possible
         2. Look into info added to reply/comment re: who got that reply/comment and who will get reply to the reply/comment
   2. Lisa
      1. Roles: Consider ppl getting multiple copies if more than one role.
      2. Talk to shawn wb/ist mgmt. and planning …..

|  |  |  |
| --- | --- | --- |
| [**ST**](https://cs.uwaterloo.ca/twiki/view/CF/STToRTInvestigationStaffMeetingPresentation20170216?sortcol=0;table=2;up=0#sorted_table) | [**RT**](https://cs.uwaterloo.ca/twiki/view/CF/STToRTInvestigationStaffMeetingPresentation20170216?sortcol=1;table=2;up=0#sorted_table) | [**RASI**](https://cs.uwaterloo.ca/twiki/view/CF/STToRTInvestigationStaffMeetingPresentation20170216?sortcol=2;table=2;up=0#sorted_table) |
| Owner | Owner | Responsible |
| Other owners | N/A | Supporting |
| Responsible | N/A | Accountable |
| Admin CC | Admin CC | Informed |
| Requester | Requester |  |
| CC | CC |  |

1. Lisa meet with Shawn (and ask ist-mgmt) about new role for RT 4.4:
   1. ‘Supporters’ role (from RASI acronym)
      1. All same as ‘owner’ ..for notifictions
      2. They are expected to do some work but are not responsible
      3. Add input etc ….
   2. ‘AdminCC’ … emailed of all transactions (like ‘owner’)
      1. Kept informed but not expected to do anything
   3. Once deciced plannon comm/doc and impl for 4.4

### Agenda

1. Review plan for rt 4.4. upgrade
2. Finalize training requirements:
   1. Number of people
      * 1. Cscf: 20-21 ppl (19 ppl plus 2 coops in HD)
        2. Mfcf mgmt. (4-5?)
      1. MFCF 14 (for future training), CSCF 18 plus co-ops
   2. Timing- booked by Lawrence..incl rooms
      1. Early April presentation style to mfcf mgmt. and all cscf staff
         1. Provide info re: how to start using live RT now in April
      2. People to do hands on ..on their own in beteen
      3. Late April QA, ..Lisa demo’g .. everyone doing together
         1. 2 hour QA
         2. Plan some demo / exercise but mostly QA
         3. Can bring laptops to try
   3. Number of sessions
   4. Topics
      1. Preferences ..default queue for ‘new ticket in’
   5. Dates
   6. Who to schedule rooms and invite attendees
   7. Jennifer/Lisa to provide training
3. Review action items from last meeting
4. Discuss items from: <https://cs.uwaterloo.ca/twiki/view/CF/STToRTInvestigationStaffMeetingPresentation20170216#QA> ;
5. Change request list from Daniel
   1. Review to see what is ready and what requires IST time
   2. Add this to our agenda for future meetings as well
6. Done: Testing help : [https://sharepoint.uwaterloo.ca/sites/rt4/TestingDocumentation/Testing/GoLiveRT4Testing.docx](https://sharepoint.uwaterloo.ca/sites/IST/CS/RT/TestingDocumentation/Testing/GoLiveRT4Testing.docx)

## Tues Feb 21 2017

### Action

1. iContinue to …Jeff/Daniel explore how to pull time worked data from rt4.4 – Update: yes possible, need to review requirements, security and how
2. Continue to ….Jeff/Daniel: see table below and delegate as appropriate
3. MFCF/CSCF to request queues needed to be set up now in RT 4.2
4. MFCF/CSCF to discuss custom role requirements and bring to next meeting:
   1. Custom roles
      1. Built in
         1. Owner RESPONSIBLE (single value field)
         2. CC
         3. Requestor
      2. AdminCC INFORMED … emailed of all transactions (like ‘owner’)
         1. Kept informed but not expected to do anything
      3. \*NEW\* ‘Supporters’ role SUPPORTING (from RASI acronym)
         1. All same as ‘owner’ ..for notifictions
         2. They are expected to do some work but are not responsible
         3. Add input etc ….
      4. \*NEW\* ‘Accountable’ role … gets all same email as owners
         1. Currently it is queue owner….
      5. ????/look into
         1. Any new roles : add desc beside name so ppl know email generated if possible
         2. Look into info added to reply/comment re: who got that reply/comment and who will get reply to the reply/comment
   2. Lisa
      1. Roles: Consider ppl getting multiple copies if more than one role.
      2. Talk to shawn wb/ist mgmt. and planning …..

|  |  |  |
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| Owner | Owner | Responsible |
| Other owners | N/A | Supporting |
| Responsible | N/A | Accountable |
| Admin CC | Admin CC | Informed |
| Requester | Requester |  |
| CC | CC |  |

### Agenda

1. Review action items from previous meeting
2. RT data retention
   1. Read only archive should be adequate
3. Discuss items from: <https://cs.uwaterloo.ca/twiki/view/CF/STToRTInvestigationStaffMeetingPresentation20170216#QA> ; in particular:
   1. parameterized search: can we make a box that accepts input to search for, in a particular parameter?
      1. Can do this with a Custom Field that is a text box (Lisa to demonstrate)
      2. E.g. … client userid … contains some text …
      3. Rt has similar functionality that will be explored by MFCF/CSCF
   2. does a person have a "default queue" which can be set, so new items (and searches?) default to it?
      1. For ticket creation: In Preferences, can set ‘new ticket in’ default queue
      2. For searches: choose queue from home screen then ‘edit search’
      3. Allgood!
   3. what will the training look like? 1 day? a few hours? (Lori)
      1. Can try: 1.5 presentation and add 1 hour optional hand-on
      2. Include mapping of what was done in ST vs what is done in RT (Jennifer, Daniel and Lisa could collaborate on topics)
4. Training requirements
   1. Timing
      1. Early April presentation style to all mfcf and cscf
      2. Late April hands on in an MC lab
         1. 2 separate sessions .. one mfcf and one cscf
   2. Number of people
      1. MFCF 14, CSCF 18 plus co-ops
   3. Number of sessions
   4. Topics
      1. Preferences ..default queue for ‘new ticket in’

## Tues Jan 24 2017

Action items:

1. Jeff/Daniel explore how to pull time worked data from rt4.4 – Update: yes possible, need to review requirements, security and how
2. Jeff – create
   1. rt44-dev.uwaterloo.ca (clone without tickets) (email not sent)
   2. rt44-test.uwaterloo.ca (clones with tickets-regular access)(email non sent)
   3. and give team necessary permissions to UI and server (using their ! nexus accounts (to be set up for some ppl)
3. Lisa to work on RT 4.4 upgrade plan with Jeff/Jennifer
4. Jeff/Daniel: see table below and delegate as appropriate

Agenda:

1. Review action items from last meeting
2. Transition discussion:
   1. Idea to stop ticket creation in ST May 1(CSCF) / TBD date (MFCF)
   2. Set deadline for updating of older tickets in ST
   3. Plan for ST to be read only for a period of time for reference
3. Discuss training and solutions to identified requirements\*\* see details below
   1. List: <https://cs.uwaterloo.ca/twiki/view/CF/STToRTInvestigationFactorsAssessment>
4. Identify who will work on what and what access needed
5. Timing for RT4.4 upgrade discussion
   1. Priority over fixing multi email addresses (based on input from mfcf and cscf)
   2. Timing Apr 1 goal

Critical/must have features\*\* (from https://cs.uwaterloo.ca/twiki/view/CF/STToRTInvestigationFactorsAssessment)

|  |  |  |
| --- | --- | --- |
| **Feature** | **Who to work on** | **Other info** |
| Tracking time spent, with a convenient interface (ie, not editing the total time worked) | Jeff to install extension(s) needed: ”TimeTracking” and “TimeTrackingAutomatic”  Jeff to ensure Daniel has adequate access  Daniel to configure and test and present to CSCF for approval |  |
| Auto lookup barcodes in inventory and hostnames in inventory and DNS, fill in corresponding info and room number, warn on typos, canonicalize hostnames, link barcodes and hostnames to inventory | Jeff to supply Daniel with appropriate documentation  Daniel to investigate and test | Daniel/Jeff –if consulting help needed let Lisa know |
| API so our inventory system can continue to report on related work items | Jeff to give Daniel API access to rt44-dev server  Daniel:  -Modify inventory system to make inquiries into RT system  -Work on Custom Field/functionality to look up data in CSCS/MFCF inventory system |  |
| Custom field, for subscription code, that we can easily extract work-hours on particular codes, and replicate the ST functionality within the "subscriptions" database. | Daniel to explore options with Jeff (look at process) …consider end goal and options |  |
| Recording data to allow budgeting / managing spending using cost-estimate (and keywords and dependency trees - such as summing cost-estimates including dependencies) | Jeff/Daniel to look into |  |
| Batch dependency creation with particular fields set to arbitrary values\* | Daniel to send Jeff current ST code for this  Jeff to look into | \*not required for May 1st; would like by end of 2017 |
| - writing MakeClicky extension for clickable links within RT comments/replies  - note: https://docs.bestpractical.com/rt/4.4.1/extending/clickable\_links.html#Custom-MakeClicky-action-example  (I think Jeff has already provided all the info I need on this). | - Daniel to write and test the extension in dev |  |

## Tues Dec 13, 2016

### Action items last meeting

* Lisa: ask consultants re: bulk dependent ticket creation
  1. Update: Lisa sent them an email Nov 22 and Jeff/Daniel have been reviewing response – looks promising
* Jeff/Daniel explore how to pull time worked data from rt4.4 – Update: yes possible, need to review requirements, security and how
* 2pm: RT training ..explore roles
* 2:30: MFCF/CSCF staff to explore critical features in existing RT 4.4 and send list of features they cannot do to jeff/lisa/Jennifer by December 7th (a week before dec group meeting)

### Agenda

2-2:30:

1. PPT:
   1. RT roles
   2. Workflow
2. Specs for new queues
   1. Input for new queues created
      1. Name
      2. Custom fields (internal or viewable by requestors)
      3. Watchers
         1. Admin CCs of queue (watchers)
         2. (CC of queue option)
      4. Who to have ‘edit’ access to all tickets in queue
      5. Reminders to be sent?
      6. Feedback on resolved tickets to be sent to whom?
      7. Email alias: [rt-*queuename*@rt.uwaterloo.ca](mailto:rt-queuename@rt.uwaterloo.ca)
   2. Forms
      1. Custom Fields match form fields
      2. See existing Forms and discuss needs/actions

2:30-3:

1. Topics of interest but not must have
   1. Approvals
2. Must haves for MFCF/CSCF
   1. Form creation via email (?)(if branding req’d)
   2. **Creating multiple related/dependent tickets (Jeff/Daniel working on)**
      1. **Functionality needed (from Robyn):**
      2. **If we understand the description of the CreateTickets ScripAction**
      3. **correctly, it seems that one can write a procedure (an "externally**
      4. **supplied template") which, when invoked, creates a set of tickets in a**
      5. **certain fashion. This is fine if you have a handful of common ticket**
      6. **sets you want to create, e.g. a fixed set of tickets for hiring a**
      7. **new staff person, or a fixed set of tickets for deploying another**
      8. **widget, etc.**
      9. **What we want is for this to be dynamic. Rather than merely being able**
      10. **to invoke a static template, we want it all to be arbitrarily defined**
      11. **on-the-fly.**
      12. **Our current system has a syntax for making arbitrary dependencies or**
      13. **see-also tickets associated with a displayed ticket. We specify a set**
      14. **of subject lines, one per line, and each line becomes a new dependency**
      15. **(or see-also) of the displayed ticket. Certain fields are automatically**
      16. **inherited from the displayed ticket. The dependencies may also include**
      17. **sub-dependencies, denoted by indentation. For example, by entering**
      18. **these subject lines in a dependency creation field:**
      19. **step 1**
      20. **step 1A**
      21. **step 1B**
      22. **step 2**
      23. **tickets for "step 1" and "step 2" are created as dependencies of the**
      24. **displayed ticket, and tickets for "step 1A" and "step 2A" are created**
      25. **as dependencies of the "step 1" ticket. The same mechanism for**
      26. **"see-also" enables us, for example, to close a user's incident ticket**
      27. **while conveniently creating related tickets for root cause investigation.**
   3. (Roles discussion)
   4. **Time tracking-Ask BP about their ideas of how to do this (although Jeff knows how to do this)- pull time worked data from rt4.4**
      1. **Billing to pull data of hours worked etc.**
         1. **Following up on question last month: are we confirmed OK to get access to batch data of time-worked and Subscription Code on all transactions pertaining to \*CF staff, even in queues we don't have access to from the web UI? - possibly a SQL query that can be run on demand and we parse the output containing that non-sensitve data? This is fairly critical for Lawrence's billing. We would need to limit it to specific queues (e.g. not HR queues) and also discuss what data would be displayed, but I think we will be able to do this to meet your needs  (Jeff confirmed and added comment “The biggest issue is limiting who a person can look up in some easily extendable way.”)**
   5. **Can we have external validators/modifiers (we write) which, upon saving an update:** 
      1. **1- validate the machine name exists in DNS; and display in RT as a link to our inventory system**
      2. **2- given a machine name, look it up in our inventory system, return the associated location, and auto-fill the location field in RT**
      3. **This would require coding, but I believe it is possible. (Jeff: Definitely doable - see https://docs.bestpractical.com/rt/4.4.1/RT/CustomFieldValues/External.html )**
   6. - (nice-to-have) How do we tweak the appearance of the custom "Summary" Field so it's not a tiny box on editing? (Maybe with the option of wiki-text?)
      1. https://rt-wiki.bestpractical.com/wiki/CustomField suggests size can be set for ALL text-fields, but we probably don't want that. Something to ask the consultants
      2. - It is by no means critical; the field has a size-dragger in the corner.
   7. Remove duplicate email sent when ticket owner changes
3. Work out details later (don’t need BP consultants and not must have)
   1. Site branding so it looks like MFCF
4. Featurs discussed and available
   1. Yes: but should discuss to ensure understanding: guarantee ability to control privacy and locality of information
   2. Yes: end user ability to see their ticket status etc. (CSCF does not expect its end users to use RT directly, but MFCF does)
   3. Yes, but some restrictions – discuss: **ability to accept arbitrary attachments**
      1. **Some extensions/attachment sizes**
   4. Yes: API for complete data import and export
   5. Yes: automatic notification of staff/clients on various conditions

NOTES

- We'll want a custom field, "Subscription Code" for all of the CSCF queues. yes  
  - if the custom field is by queue, and we moSve the item to a different CSCF queue, will it preserve subscription code value from the first queue? Yes, as long as the field exists in both queues ☺  
  - if we move the item to, say, the SOC queue which does not have the custom field, and then it gets moved back to a CSCF queue, will the value still be set? I think so but we will want to test-Jeff confirmed this works.   
  
- Following up on question last month: are we confirmed OK to get access to batch data of time-worked and Subscription Code on all transactions pertaining to \*CF staff, even in queues we don't have access to from the web UI? - possibly a SQL query that can be run on demand and we parse the output containing that non-sensitve data? This is fairly critical for Lawrence's billing. We would need to limit it to specific queues (e.g. not HR queues) and also discuss what data would be displayed, but I think we will be able to do this to meet your needs ☺ (Jeff confirmed and added comment “The biggest issue is limiting who a person can look up in some easily extendable way.”)  
  
- We'll want custom fields, "Account Number", "Machine Name" and "Location"; yes  
  - Can we have external validators/modifiers (we write) which, upon saving an update:    
  1- validate the machine name exists in DNS; and display in RT as a link to our inventory system   
  2- given a machine name, look it up in our inventory system, return the associated location, and auto-fill the location field in RT

This would require coding, but I believe it is possible. (Jeff: Definitely doable - see <https://docs.bestpractical.com/rt/4.4.1/RT/CustomFieldValues/External.html> )

  - Validation: given a requester, can it warn us if the supplied username doesn't exist in WatIAM? And if the flex-field/account number has the wrong number of digits? Again, this would require coding but I think it is possible (Jeff: There are hooks for the former, we've just been "tooo busy" to make use of them. There is also simple validation (regexp) for CFs, or via a callback on ticket submission.) WE ARE GOOD

- Our workflow currently depends on the order of owners. But RT tickets have a single "Owner" and arbitrary numbers of Watchers (AdminCC, CC, and Requester) which appear in alphabetic order within each category. TALKED ABOUT

  - CSCF question: Is this an OK workflow change for us? So our Watchers are only grouped by type but not in order of "relevance"? OK  
    - Noting a minor change we've already discussed: in RT-speak, "CC" doesn't necessarily have permission to work on the ticket, and "AdminCC" generally does have permission (different from ST's "AdminCC" which is for observers who aren't workers). (Not sure if this is a question for IST, but CC does have permission to work within a ticket and we can discuss other role options too.) OK

  - CSCF question: are we OK with losing the "Responsible" who is different from "Owner"? If not, we'll need a custom field for it. \*It is important to keep standard roles/fields and related behaviour (e.g. who gets email when) for all RT queues to avoid confusion. That being said, we can approach this as a new ‘feature’ that would be available to all. (Jeff: Actually a Custom Role, not field. Whether it's limited to ??CF queues or is allowed to spread through the other ones is for later discussion. You can assign permissions to a role, but not a field.) OK

- (nice-to-have) How do we tweak the appearance of the custom "Summary" Field so it's not a tiny box on editing? (Maybe with the option of wiki-text?)   
  <https://rt-wiki.bestpractical.com/wiki/CustomField> suggests size can be set for ALL text-fields, but we probably don't want that. Something to ask the consultants  
  - It is by no means critical; the field has a size-dragger in the corner.

3-3:30:

1. Prepare list of topics for Best Practical to cover
   1. Day 1
      1. Intro to new features in RT 4.4.x as part of comprehensive overview of RT including: RT’s features, web interface, and detailed exploration of RT’s functionaltity
      2. Overview of the set-up of common help-desk configurations, from rights mgmgt, constructing workflows and notifications and the basics of Lifecycles
   2. Day 2 (custom)
      1. Answer questions and provide best practices and have technical architecture discusions about RT in respect to
         1. Approvals
         2. Time tracking
         3. pull time worked data from rt4.4
         4. Form creation
      2. Add/change from day 2
         1. See ***Critical Factors and Features below***

## Tues Nov 22 2016

**Attendees**:

### Action items this meeting

* Lisa: ask consultants re: bulk dependent ticket creation
  + Update: Lisa sent them an email Nov 22
* Jeff/Daniel explore how to pull time worked data from rt4.4
* Next meeting re: RT training ..explore roles
* MFCF/CSCF staff to explore critical features in existing RT 4.4 and send list of features they cannot do to jeff/lisa/Jennifer by December 7th (a week before dec group meeting)

### Action items last meeting

1. MFCF/CSCF staff:
   1. experiment with RT 4.4 and create a list of questions relating to critical factors and features to bring to Nov meeting
   2. Reach out to Lisa/Jeff if questions over next month
2. Lisa
   1. Done:Send this to the team
   2. Planning
      1. Done: IST project intake (done)
      2. Charter
      3. comm plan
      4. wbs
      5. roles and resp
      6. Other
   3. Done: Schedule a separate meeting to discuss IST/UW RT workflow and specs for new queues and what done when new queues/forms created

### Agenda

1. Review (see NOTES below):
   1. Critical features and nice to haves (see ‘Critical Factors and Features’ sent from MFCF/CSCF)
      1. - We'd like to add a summary field to the dev instance- ideally, appearing prominently, so we can tell at a glance what work is remaining on an item.
         1. -I have added a ‘Summary’ custom field to the MFCF-test queue on the dev instance (e.g. see: https://rt44-dev.uwaterloo.ca/Ticket/Display.html?id=525690 ). You will see it in the Custom Fields section and can add to it by clicking on Custom Fields and then entering text into the Summary field. (the size of the field can be increased by dragging the bottom right hand corner)
      2. - How might batch-dependency creation work? can RT create dependencies via email? (I see in your latest notes you've mentioned "search then batch update" - maybe we will want to see that in operation). **GOAL: not merely to record a collection of dependencies that already exist, but to automatically create a collection of dependencies.**
         1. -batch-dependency seems to be possible (regarding doing this via email, see 2. Below). To do this in the UI: Create a Search and click ‘Add these terms and search’; it will then show you the search results; then you can click the ‘Bulk Update’ link at the top; in the Bulk update screen, you can scroll down to the ‘Edit Links’ section and fill in the dependencies as appropriate.
         2. Via email we can (exact details will need to be explored):
            1. our @REGULAR\_ATTRIBUTES = qw(Queue Owner Subject Status Priority FinalPriority);
            2. our @TIME\_ATTRIBUTES = qw(TimeWorked TimeLeft TimeEstimated);
            3. our @DATE\_ATTRIBUTES = qw(Due Starts Started Resolved Told);
            4. our @LINK\_ATTRIBUTES = qw(MemberOf Parents Members Children HasMember RefersTo ReferredToBy DependsOn DependedOnBy);
            5. our @WATCHER\_ATTRIBUTES = qw(Requestor Cc AdminCc);
            6. For more details see <https://github.com/bestpractical/rt-extension-commandbymail>
      3. - if we've started an item that is handed off to an IST queue, is our viewing access limited to those \*CF people who are specifically listed as workers/CCd on the item?
         1. -regarding CSCF staff seeing tickets that are created by CS staff that are passed along to IST: For some IST-\* queues we have opened up viewing of the tickets to other IT staff on campus. I hope we can do this with more IST queues. We can discuss needs and explore possibilities with groups and permissions and also explore in RT4.4. We need to make sure that we don’t allow viewing of tickets in confidential queues (e.g. HR) to all of CSCF, because a ticket is requested by someone in CS.
         2. Ideas
            1. Open IST-\* queues for IT staff on campus
            2. Dashboard sent to IT staff of all tickets created by anyone in CS or Math
            3. Explore roles
      4. Time tracking with tickets that are collaborated on between CS staff and potentially IST staff
         1. Process details and exploration
         2. Ideas
            1. Have ppl put comment or reply in with the amount of time worked at the same time THEN talk to BP re: how to pull this out based on date and summarize by person: list of tickets that shows time worked by that person within each week
   2. Ticket roles
   3. If time, also see: <https://cs.uwaterloo.ca/twiki/view/CF/STToRTInvestigationFactorsAssessment>
2. Discuss what may require development/investigation
   1. High priority but not required for go live
      1. How might batch-dependency creation work? can RT create dependencies via email? (I see in your latest notes you've mentioned "search then batch update" - maybe we will want to see that in operation). GOAL: not merely to record a collection of dependencies that already exist, but to automatically create a collection of dependencies.
         1. AND/OR create a standard set of ticket at once (Master ticket and multiple dependent/refer to ticket)
         2. Ideas: RT form tool, Approvals
   2. Required to go live
      1. Time tracking with tickets that are collaborated on between CS staff and potentially IST staff
         1. Process details and exploration
         2. Ideas
            1. Have ppl put comment or reply in with the amount of time worked at the same time –CSCF already does it only this way (via comment/reply)

THEN talk to BP (Search options) or John Kemp (MS BI) or internal script that generates email or ??? re: how to pull this out based on date and summarize by person: list of tickets that shows time worked by that person within each week and send report to CSCF or MFCF manager

1. Review RT 4.4. question for consultants relating to critical factors and features
   1. Review list in 2. above
2. Winter planning
   1. Training
   2. Configure 4.4 as needed
   3. Finish migration plan
   4. … more needed here
   5. May go live

## NOTES

### Ticket Roles – notes from MFCF/CSCF

Often for simpler requests the responsible person is the same as the owner.

When they are different, the difference is that the responsible person is where the buck stops -- making sure the work happens, but not actually doing the work. The work is done by the owner(s).

Responsible:

The "Responsible" field in a work request identifies the single entity that is responsible for resolving the request. It is either a UW userid, or an e-mail address of another work tracking system, typically "request@ist".

Owner:

The "Owner" field in a work request identifies who (or what) is doing the work to resolve the request. An owner is either a UW userid, or an e-mail address of another work tracking system, typically "request@ist".

* Could add new role called ‘Responsible’ (or ‘Point of contact’) that only applies to MFCF queues (if needed)

AdminCC role could be ‘second, third etc.’ owner …OR a new role called ‘backup-owner’ could be created

The "Admin CC" field in a service record identifies who wishes to monitor the work, by receiving the same generated email that the owner does, and by having the same access to the record that the owner does. This is typically someone in a supervisory or management role.

### Critical Factors and Features

\*\*see also: Reference: <https://cs.uwaterloo.ca/twiki/view/CF/STToRTInvestigationFactors> \*\*

• We need a smooth process for making improvements to the software, whether it's in order to add or modify features, or in order to accommodate our workflow (including changes we make to our workflow to meet our client needs).

* Dev server to develop/test
* Turnaround time if IST needs to make the changes on live server
* Explore ability to distribute admistration based on types of changes

• We need prompt updates about planned changes to the software that are outside of our control.

* Already in place, CM plan

• Feature: tracking time spent, with a convenient interface (ie, not editing the total time worked)

* Process: Actions/Comment, enter time worked (and comments optionally) OR use built in timer feature within ticket (click on small clock icon to initiate)

• Feature: ability to view all tickets in queue, not just ones you're involved with

* Can be done based on permissions – read only mode for a group of users, etc.

• Feature: Item dependencies and see-also

* Built in
  + Child/parent
  + Refers to referred by
  + Depends on, depended on by

• Feature: Ability to update tickets via email

* Comments/replies: built in
* Modify status, subject, etc: a plug in exists that can be explored

• Feature: Attachments to related documentation- uploading files, as well as links to private/public files.

* Attachments: yes
* Links to private/public files:
  + can be added in the ‘Refers to’ Link
  + (OR: could create Custom Field for this – may not be best but up to department etc.)

• Feature: Auto lookup barcodes in inventory and hostnames in inventory and DNS, fill in corresponding info and room number, warn on typos, canonicalize hostnames, link barcodes and hostnames to inventory

* Custom java script development would be required and would utilize Custom Fields/Scripts

• Feature: Auto lookup users and email addresses, canonicalize, show real name, link to WatIAM, warn on typos

* Included – except non ‘warn on typos’ yet
  + In request forms or when replying to a ticket:
    - There is a way to validate requestor, etc. to ensure they exist in RT and show error message (call back feature)

• Feature: Handle simultaneous update by multiple users of multiple fields in the same request without locking or losing updates

* Would want to test this; all changes will be logged and last update to specific fields will likely be saved

• Feature: Sort search results by due date, date created, or last acted (or any field displayed)

* Included in search feature, improved with 4.4

• Feature: Arbitrary SQL searches (e.g. date\_created>unix\_timestamp()-3600\*24\*7 and subject like '%print%') with ability to bookmark and API (e.g. needed for Bill's run-on sentence)

* Would need to explore

### Important Factors and Features

• We'd like to collaborate with IST and other RT stakeholders to implement an RT-connected Knowledge Base

* Can do this

• Feature: batch dependency creation with particular fields set to arbitrary values

* Do a search then batch update may meet this need

• Feature: flexible search; if possible, ability to include SQL (eg., Fraser will fine-tune search query with SQL wildcards such as "evergreen%MC%3007")

* Advanced search will likely meet this need in Search builder

• Feature: API so our inventory system can continue to report on related work items

* Should be doable

• Feature: custom field, for subscription code, that we can easily extract work-hours on particular codes, and replicate the ST functionality within the "subscriptions" database.

* Need more detail; likely possible

• Feature: recording data to allow budgeting / managing spending using cost-estimate (and keywords and dependency trees - such as summing cost-estimates including dependencies)

* ‘Time Worked’ field does this; would need to explore for Time Estimated; would need to review

• Feature: direct access to the uploaded attachments, eg., smbmount

* Not available due to permissions on queues/tickets

• Feature: Arbitrary choice of columns and their order and optional abbreviation in search results with ability to bookmark and API

* Yes, available in search builder

### Nice-to-have Factors and Features

Feature: command-line access to perform searches and updates

* Available ..would need to review

## October 25 2016

Attendees: Jennifer, Lawrence, Daniel, Fraser, Jeff,Lisa, Jim, Lori

### Action items

1. MFCF/CSCF staff:
   1. experiment with RT 4.4 and create a list of questions relating to critical factors and features to bring to Nov meeting
   2. Reach out to Lisa/Jeff if questions over next month
2. Lisa
   1. Done:Send this to the team
   2. Planning
      1. IST project intake (done)
      2. Charter
      3. comm plan
      4. wbs
      5. roles and resp
      6. Other
   3. Done: Schedule a separate meeting to discuss IST/UW RT workflow and specs for new queues and what done when new queues/forms created

## Agenda

1. Planning
   1. Monthly meetings and action items
   2. Fall/Winter planning, testing
   3. Training: RT 4.4. training from Best Practical
      1. Dates: Do these work for all?
         1. Jan 18 training (larger group of 12): Robyn, Lori, Daniel, Fraser
         2. Jan 19 consulting (smaller group of 8) Robyn, Daniel or Fraser
      2. Plan who to attend and date options (there will be room for 1-2 people from CSCF and MFCF to attend)
   4. ~May go live
   5. Review: <https://cs.uwaterloo.ca/twiki/view/CF/STToRTInvestigation#Implementation_Plan>
2. RT4.4 overview
   1. On dev machine: <https://rt44-dev.uwaterloo.ca>
3. Who would like to meet to go over standard workflow in RT 4.2 ?
   1. Daniel, Lawrence, Fraser, Jim- all?

## Tues Jun 28 2016

### Attendees

Lawrence E Folland <lawrence.folland@uwaterloo.ca>; Robyn B Landers <rblanders@uwaterloo.ca>; Jim Johnston [jim.johnston@uwaterloo.ca](mailto:jim.johnston@uwaterloo.ca); Lisa Tomalty [ltomalty@uwaterloo.ca](mailto:ltomalty@uwaterloo.ca); Jeff Voskamp; Daniel Allen <drallen@uwaterloo.ca>; Lori Suess

### Regrets

Fraser Gunn <fraser.gunn@uwaterloo.ca>;

1. RT4 overview and training
   1. UI
2. Action
   1. Lisa to book monthly meetings

## Mon Jun 6 2016

### Attendees

Lawrence E Folland <lawrence.folland@uwaterloo.ca>; Fraser Gunn <fraser.gunn@uwaterloo.ca>; Daniel Allen <drallen@uwaterloo.ca>; Robyn B Landers <rblanders@uwaterloo.ca>; Jim Johnston [jim.johnston@uwaterloo.ca](mailto:jim.johnston@uwaterloo.ca); Lisa Tomalty <ltomalty@uwaterloo.ca>

### Action items

1. Lisa to schedule training meeting with all incl Jeff
2. Lisa to request dev server for cscf and mfcf and set up perm for all on mfcf-teest queue

### Notes

1. Timing
   1. Considering May 2017
   2. Hope for CSCF/MFCF to move at same time
2. Training
   1. By request (Lisa and/or Jennifer)
3. Getting familiar with IST’s current RT
4. Permissions discussion
5. Possible use of owner/admin cc
6. Linking tickets