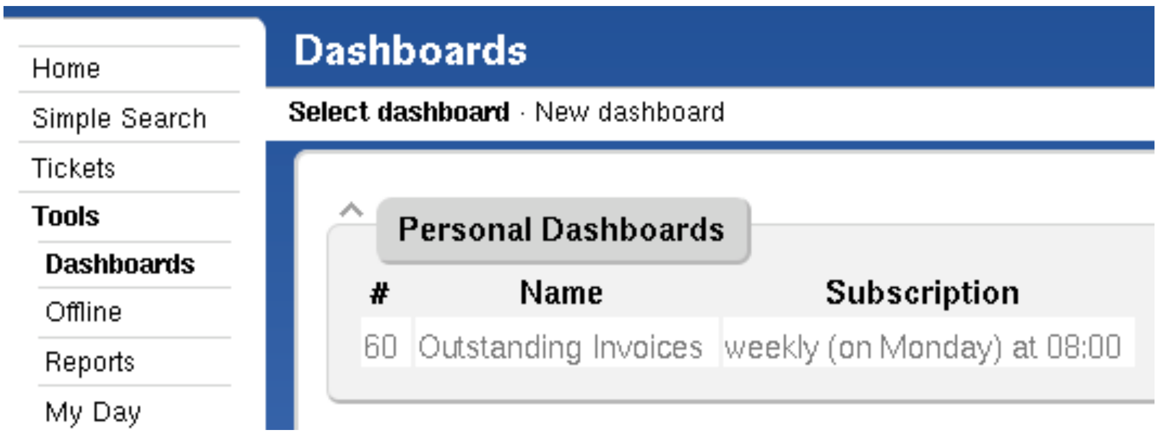
RT Dashboard Notifications – a Quick Introduction

If you have ever wanted to be notified of something in RT, and share it with others—to followup on a set of tickets monthly, for instance, or track the status of a queue—you can set up notifications with dashboards: named, shared collections of saved searches.

This quick tutorial by our own Ruslan shows you how to use this new feature in RT 3.8.

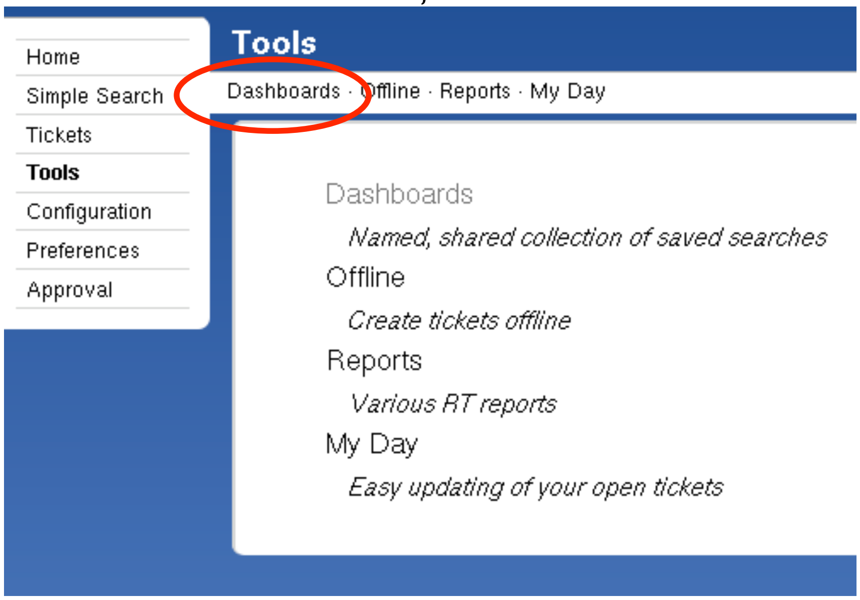
In this example we'll be setting up a notification to show Outstanding Invoices, which will be emailed each Monday at 8 am.

Below is what it should look like when we're done.

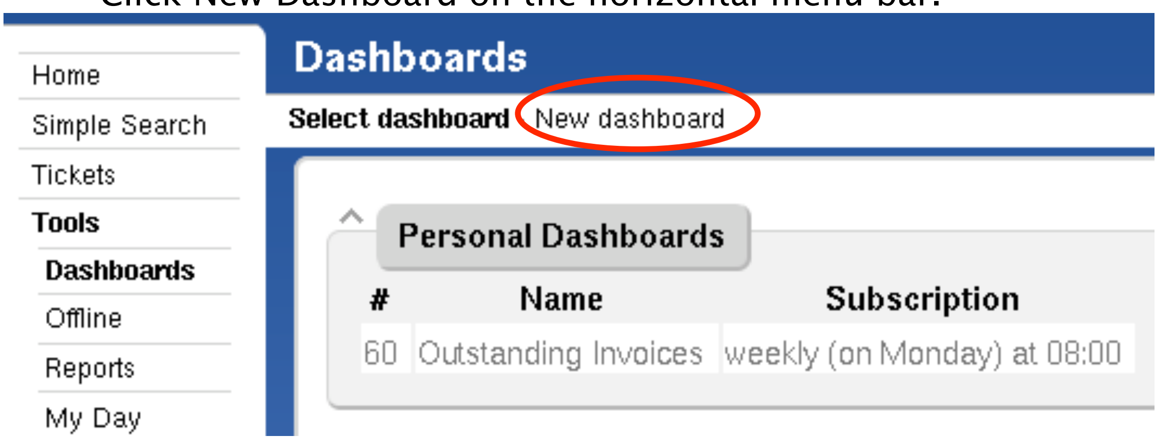


Setting up a New Dashboard

In the Web interface toolbar, click Tools→Dashboards.



Click New Dashboard on the horizontal menu bar.

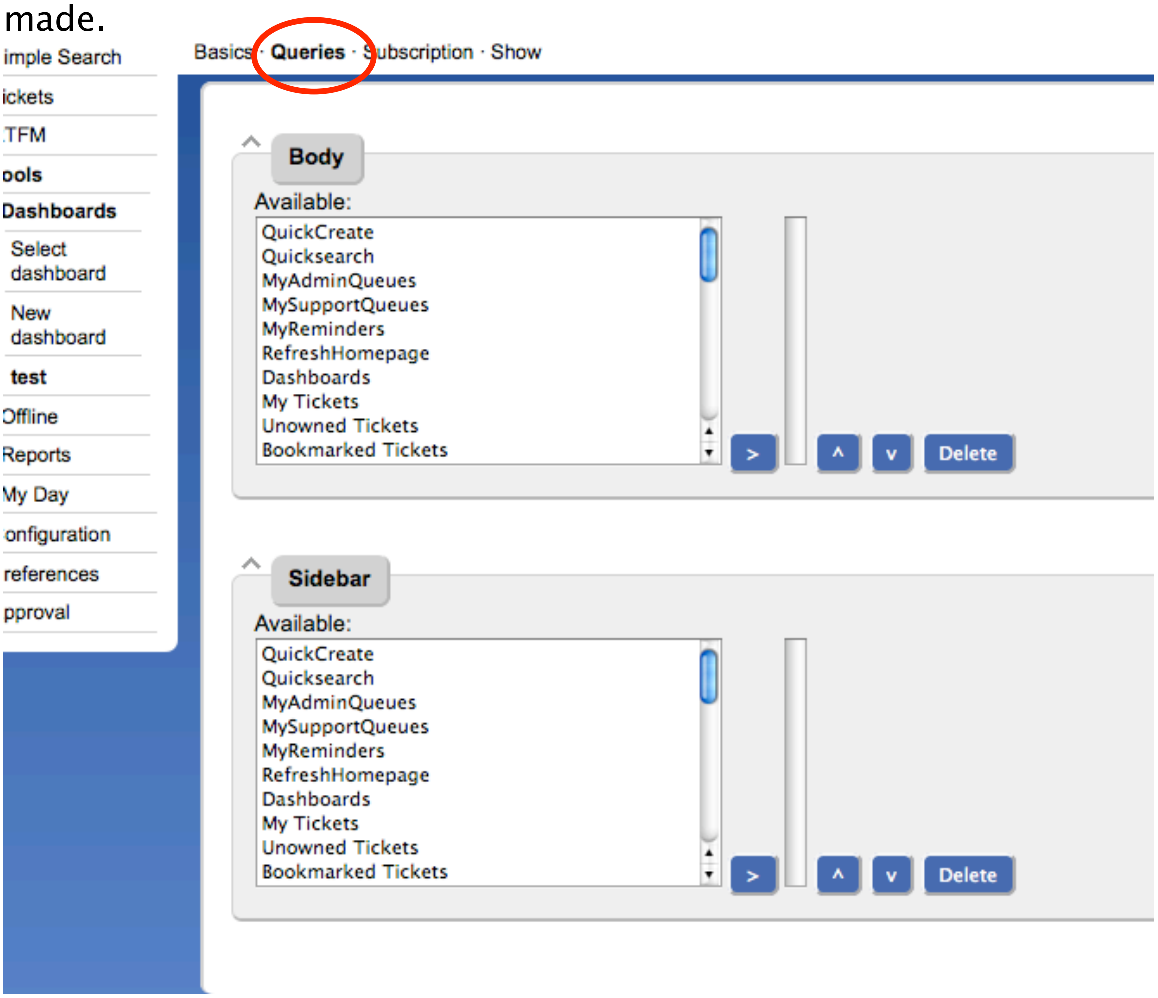


Type the name of the dashboard—in this case, 'Outstanding Invoices'--and click 'Create.'

Now you have a new, empty dashboard. You'll want to fill it with some data.

Associating the Dashboard with a Query

Click on 'Queries' on the horizontal menu bar. You'll see a list of available saved searches you can add to the dashboard you just made.



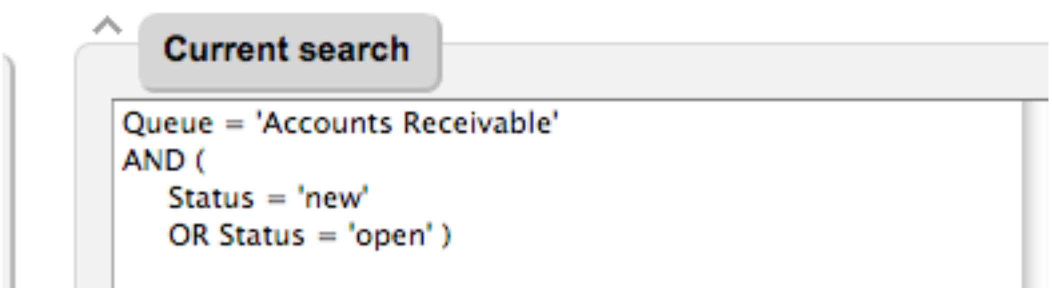
If you already have a saved search you want to use, skip to "Adding a Saved Search to the Dashboard.

Creating a New Saved Search

In this example, the saved search we want isn't there. We need to create a new saved search for all the outstanding invoices, so that it will appear on the list of available queries to add to the dashboard.

Open a new browser window/tab and load RT. In the new window, go to Tickets→New Search to load the Query Builder. You can use either the Advanced option on the horizontal menu bar or the dropdown boxes in the UI to build your search.

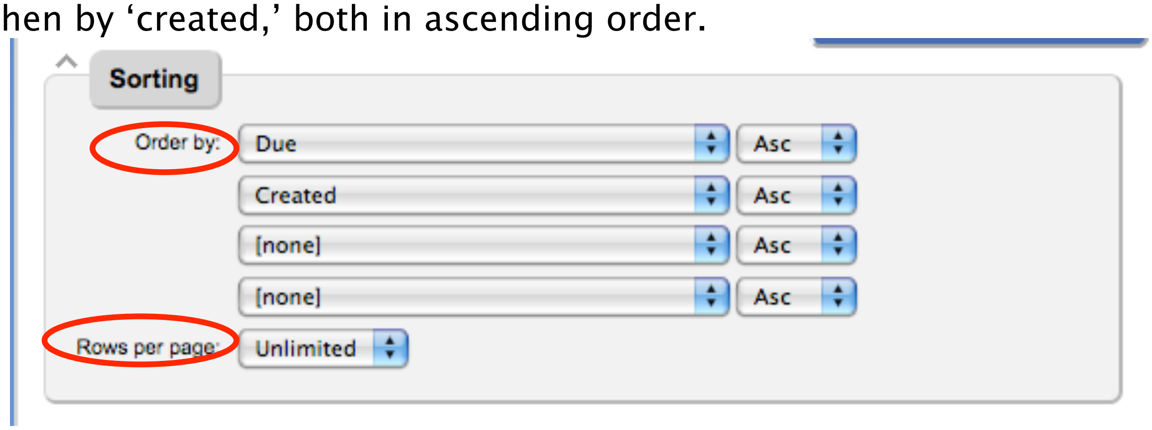
Here's what our search for all the outstanding invoices will look like:



For the saved search to return results that will meet your own needs, you will need to adjust the query accordingly. For example, you might want to drop the Queue field or other fields.

In our example, we're going to continue on and set our sorting options as well. Under Sorting, we'll set the rows per page to unlimited to show us all the tickets in one page.

To get a reasonable sort order, we've decided to sort by 'due' and then by 'created,' both in ascending order.

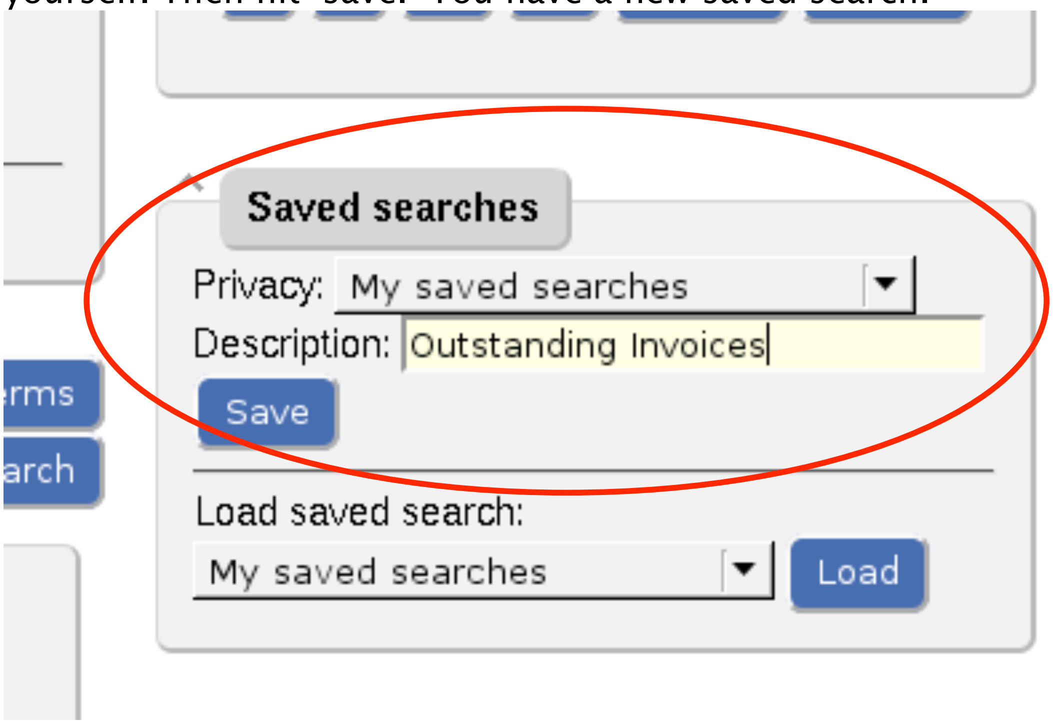


Now it's time to test the search by clicking the 'add these terms and search' button. You can go back forth and back between results and query builder to adjust settings and tweak it until you get the results you want in the order you prefer.

Once you've got results you want to see, you'll want to save your search.

If you've been viewing the search results, return to Query Builder.

Under the "Saved Searches" box, type "Outstanding Invoices" in the description field. Adjust the privacy settings if you like, to share this saved search with a particular group or keep it all to yourself. Then hit 'save.' You have a new saved search.

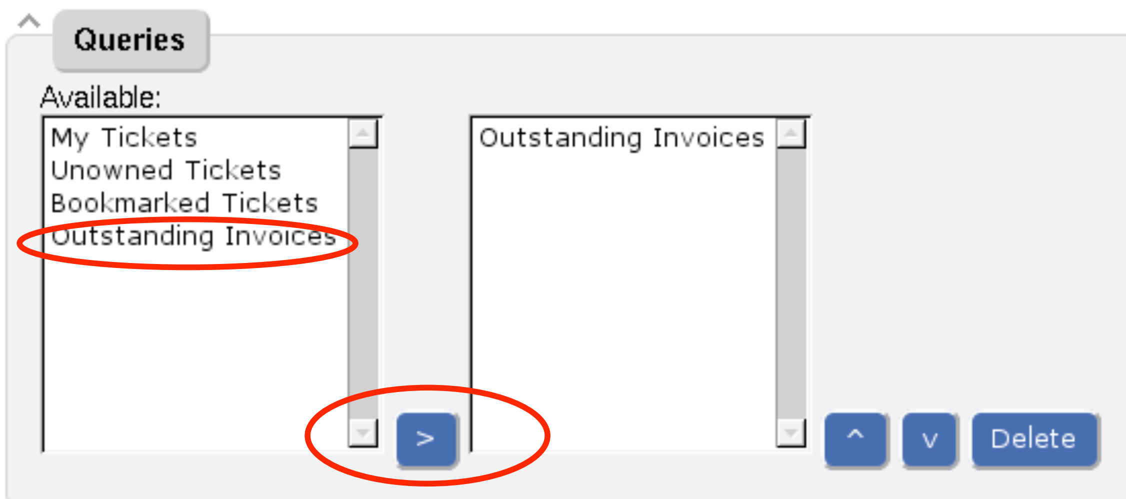


Return to the original browser window where you created the dashboard.

In the original window, click on 'Queries' to refresh the list. The new search you just created should now be available.

Adding a Saved Search to the Dashboard

We now need to add the saved search to the dashboard. Select the query from the list of available queries, and click the right arrow. The query should move to the right-hand column.



You can click the 'Show' menu item on the horizontal menu to preview the contents of the dashboard.

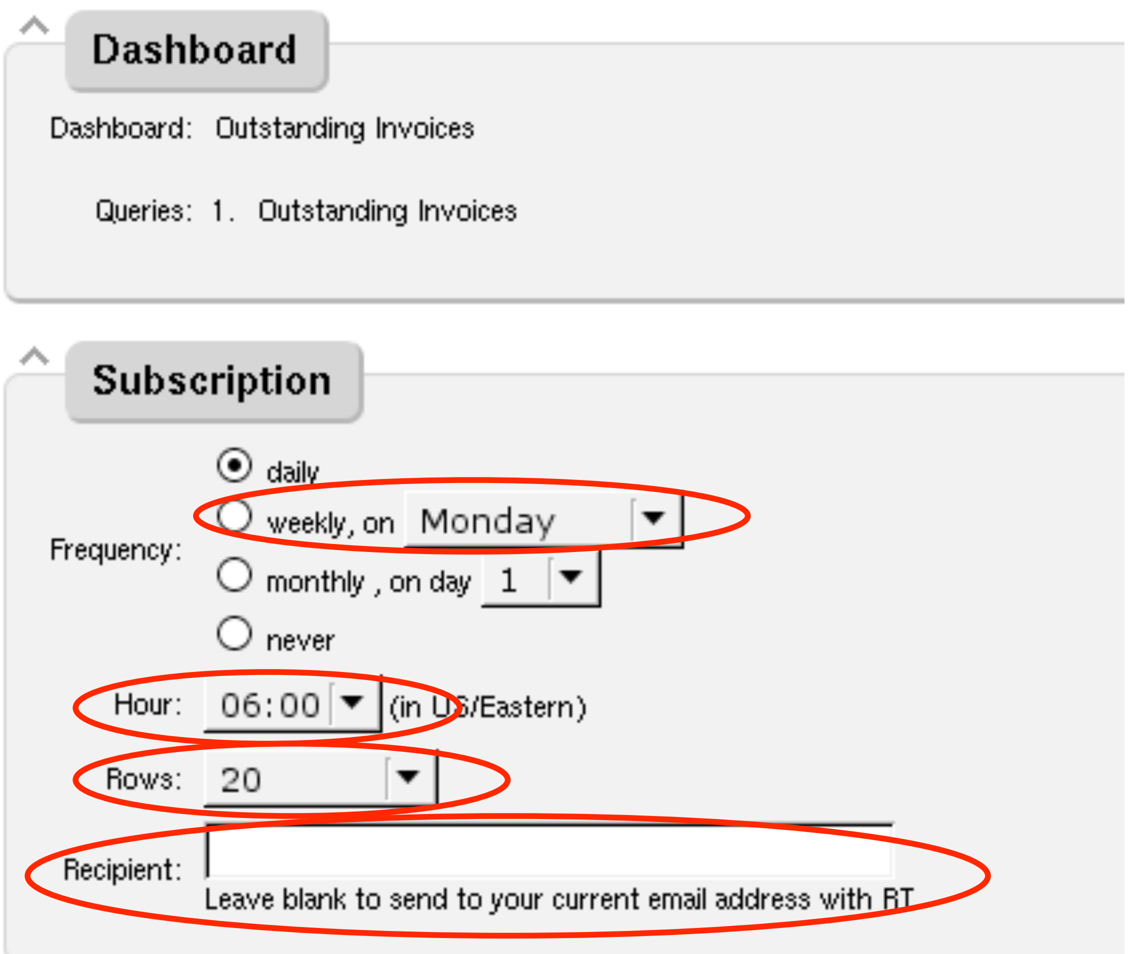
(In this example we're only adding one search, but you can add multiple searches to each individual dashboard to track different types of interrelated information flexibly, yet see it at a glance. For instance, two queries, "outstanding invoices" and "overdue invoices," could form a dashboard called "all outstanding invoices." Software engineers could combine three queries, "bug fixes," "feature requests," and "documentation," into a dashboard called "our new release.")

Data on a Schedule: Dashboard Subscriptions & Sharing

The dashboard now has data, but the real power of dashboards is that you can get the data on a schedule, and can share your dashboard with other people. You do that by setting up subscriptions.

In the horizontal toolbar, go to the 'subscription' menu. We've chosen to set up this example for a weekly reminder on Mondays at 8 am.

Click the radio button next to 'weekly.' Select Monday from the dropdown menu. Select 08:00 as the time (it's a 24-hour clock). Under rows, select 'unlimited.'



Type the email at which you want to receive notifications into the recipient field.

If you want to share your dashboards with other people, you can type their emails into the recipient field too. You can send to multiple recipients by separating the emails with commas (ie: kermit@theswamp.org, misspiggy@boutique.com). You can also share dashboards by changing the privacy level under “basics” in the horizontal toolbar as you wish.

Now, hit the subscribe button.

The dashboard will send the data you’ve selected to the emails you’ve selected on the schedule you chose.

That’s it!

Editing Dashboards

You can edit the dashboard name and privacy level, associated queries, or subscription information at any time by going to tools→dashboards, clicking on the dashboard name, and using the horizontal menu bar.

Deleting Dashboards

You can delete the dashboard by highlighting the dashboard name, clicking ‘basics’ on the horizontal menu bar, then clicking ‘delete.