

# RTFM

## The RT FAQ Manager

RTFM, the RT FAQ Manager, is a tool for maintaining an organizational knowledgebase. It integrates with, and runs on top of, RT 3.

### Terminology

Here are some terms you will see when using RTFM and this documentation.

**article:** the central object in RTFM, roughly equivalent to a ticket in RT.

**classes:** an administrative unit or category, roughly equivalent to a queue in RT.

**configuration:** click this to start administering RTFM (see the *RTFM Administration* section of this chapter).

**custom fields:** database fields that can be customized to each organization's needs. Similar to custom fields in RT but with some important differences (see the *RTFM Administration* section of this chapter for more on custom fields).

**history:** everything that has happened to an article, such as when it is created and modified. Cannot be changed.

**modify:** change an article's name, summary, class, and/or relationships.

**overview:** the RTFM home or start page

**update:** this option on the overview page leads you to an article's Modify screen (see *modify* above).

### Installing RTFM

If RTFM is already installed, skip this section and move on to *Using RTFM* below.

## Upgrading RTFM from an earlier 2.0.x release

1. Edit RTFM's makefile to point to your RT 3 instance.
2. Make sure that MySQL or pgsq's commandline tool is in your path.
3. Type `make upgrade`
4. Stop and start your web server.

## Installing RTFM

1. Install RT 3.0.x
2. Once RT 3.0 appears to be happily installed, `cd` into the directory you unpacked RTFM into.
3. Edit RTFM's makefile to point to your RT 3 instance.
- 4) Make sure that MySQL's or pgsq's commandline tool is in your path.
5. Type `make install`
6. Stop and start your web server

## Using RTFM

From within RT, click the RTFM button in the left side navigation bar to connect to the knowledgebase. That leads you to RTFM's Overview page, which will look something like this (once it has articles in it).

| 10 newest articles   |            |          |
|--|------------|----------|
| # Name   | Created by |          |
| 5 <b>Viruses</b><br>prevention of Software Transmitted Diseases                      | root       | [Update] |
| 3 <b>Resetting password</b><br>Information for users who've forgotten their password | RT_System  | [Update] |
| 4 <b>The Internet is broken</b><br>Help getting online                               | RT_System  | [Update] |
| 1 <b>I can't print</b><br>What to tell users when they can't print                   | root       | [Update] |

| 10 most recently updated articles   |            |          |
|---|------------|----------|
| # Name  | Created by |          |
| 1 <b>What to tell users when they can't print</b><br>What to tell users when they can't print                           | root       | [Update] |
| 3 <b>Information for users who've forgotten their password</b><br>Information for users who've forgotten their password | RT_System  | [Update] |
| 4 <b>Help getting online</b><br>Help getting online   | RT_System  | [Update] |

Quick search

- ArticleTest
- Test2

Create an article

- ArticleTest
- Test2

The overview page has several parts, described below.

**10 newest articles:** look under this heading for the articles that have been created most recently.

**10 most recently updated articles:** look under this heading for the articles that have been modified most recently.

**Quick search:** click a class under this heading to display the articles in that class. (See also the *Searching* section of this documentation.)

**Create an article:** click a class under this heading to create an article in that class. (See also the *Creating an article* section of this documentation).

**Articles:** this option in the left side navigation bar takes you to a search page. (Covered in the *Searching* section of this documentation.)

**Configuration:** this option in the left side nav bar takes you to RTFM's administration pages where, if you have the rights to do so, can work with classes and custom fields. (Covered in the *RTFM Administration* section of this documentation).

The **name of each article** is clickable, as is the word **Update** near it; clicking either will display a yellow article number in the left side nav bar. Clicking the **name or number** of the article takes you to its Display. Clicking **Update** takes you to the ticket's Modify page, which we describe in the *Modifying an article* section of this documentation.

## Creating an article

There are two ways to start creating an article: from the overview page (you choose a class in the same step) or from the left side nav bar (which has you select a class in the next step).

From the overview page:

look under **Create an article** on the right side of the screen -> click the class of your choice

From any page:

click **Articles** in the left side nav bar -> click **New Article** -> click the class of your choice

Now you can finish creating your article. Fill in the fields on the **Create a new article** page, shown in this screen shot.

RT **Create a new article**

RTFM  
Overview  
Articles  
Configuration

Name

Summary

Class Test2

**Relationships**

Enter Articles or URIs to link Articles to. Seperate multiple entries with spaces.

Refers to:

Referred to by:

**Name:** the name of your article.

**Summary:** a short description about your article that will appear under the name in listings (optional but useful).

**Class:** will already be filled in.

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**Refers to:** used when an article contains some sort of reference to another article or a URL.

**Refers to by:** used when another article or a URL refers to this article.

When you're done, click the `Create` button.

This process results in a very basic article. You will almost definitely want to add content with custom fields; see *Custom fields* section later in this document.

## Modifying an article

There are two ways to begin modifying an article:

from the Overview page, click `Update` next to the article you'd like to change

or:

from anywhere (such as a search results page or the Overview page), click the name of the article you'd like to change -> click `Modify` in the left side nav bar

From the resulting Modify screen, you can change the article's **name**, **summary**, and **class**, as well as delete current **relationships** (refers to, referred to by) or add new ones. If any of the preceding sentence was unclear to you, see the above *Creating an article* section for definitions.

Modifying an article's custom fields is more complicated; see the *RTFM Administration: Custom fields* section of this documentation.

## Searching

There are two ways to search for articles in RTFM.

click `Articles` in the left side nav bar

The screenshot shows a search interface with a blue header 'Search for articles' and a sub-header 'Advanced Search Criteria'. Below the header, there are several search criteria fields:

- Class is**: A text input field containing 'ArticleTest Test2'.
- and is not**: A text input field containing 'ArticleTest Test2'.
- Name matches**: A text input field.
- and not**: A text input field.
- Summary matches**: A text input field.
- and not**: A text input field.
- Created between**: Two text input fields separated by 'and'.
- Updated between**: Two text input fields separated by 'and'.
- Which refer to**: A text input field with a note 'Seperate multiple URLs with spaces'.
- Which are referred to by**: A text input field with a note 'Seperate multiple URLs with spaces'.

As you can see, on this page, you can search by class, name, summary, creation or update dates, and relationships (refer to, referred to by). Click the `Submit Query` button (not shown) when

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you are satisfied with your search terms. If there are no results, the screen will not change. If there are results, they will be displayed at the top of the otherwise unchanged page. You may **refine your search** by entering more search terms and clicking `Submit Query` again.

If you just want to quickly display all the articles in a given class:

from the Overview page, click a class name under `Quick Search`



RTFM will display a list of every article in the chosen class. Click `Show advanced search options . . .` to refine the search with the more complex search page shown in the first part of this section.

### Deleting an article

Unlike classes (and queues and tickets in RT), articles can be deleted:

search for an article -> click the article name -> click `Delete` in the left side nav bar -> click the `Yes` button

If you need help with search, see the *Searching* section of this documentation.

or

from the Overview page, click the article name -> click `Delete` in the left side nav bar -> click the `Yes` button

## RTFM Administration

In addition to basic article use, administrators need to know about classes, custom fields, and rights. Click `Configuration` in the left hand nav bar to reach the administrative portion of RTFM.

Classes and custom fields are explained in detail below. To administer rights for classes and custom fields, we refer you to RT's main documentation, where user and group rights are explained in-depth.

### Classes

Classes are administrative units in RTFM. An article must belong to one, and only one class. Custom fields must be associated with classes (see *Custom fields* in this documentation) but a custom field can be associated with several classes.

#### Creating a new class

To create a class:

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click `Configuration` in the left side nav bar -> click `Classes` -> click `New class`  
-> type a name in the `Class Name:` text box -> type a few words in the `Description:`  
text box -> click the `Submit` button

### Modifying classes

To modify a class, first, you'll want to get to the correct screen:

click `Configuration` in the left side nav bar -> click `Classes` -> click the name of  
the class you want to modify

Or, if you're already working with classes:

click `Select class` in the left hand nav bar

You'll be brought to `Basics` screen for that class, where you can modify its **name** and  
**description**, or **disable** and **enable** it. Click the `Submit` button when you're done.

To modify custom fields, group rights, and user rights of a class, see *A class' rights* in this  
section or the *Custom Fields* section later in this documentation.

To modify a **disabled** class:

check the `Include disabled classes in listing` checkbox -> click the  
`Go!` button -> click on the class in the resulting list.

Now that you're in the right place, the first screen where you can make changes is the **Basics**  
page, where you can change the name and description, or re-enable the class. When you're done  
making changes, click the `Submit` button.

### Disabling or re-enabling a class

You can't delete a class; you can only disable it:

click `Configuration` in the left side nav bar -> click `Classes` -> click the name of  
the class you want to disable -> clear the `Enabled (Unchecking this box  
disables this Class)` checkbox -> click the `Submit` button

To re-enable a class:

click `Configuration` in the left side nav bar -> click `Classes` -> check the  
`Include disabled classes in listing` checkbox -> click the `Go!` button ->  
click on the class you'd like to re-enable -> check the `Enabled (Unchecking this  
box disables this Class)` checkbox -> click the `Submit` button

### Associating custom fields with classes

This procedure is explained in the next section, *Custom fields*.

### A class' rights

To grant or revoke user or group rights for a class:

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click `Configuration` in the left side nav bar -> click `Classes` -> click the class whose rights you want to administer -> click `Group Rights` or `User Rights` in the left nav bar

Rights in RTFM work like rights in RT. See the sections about rights in *Chapter 4: Adminning RT* for more detail, particularly the section *Queues: Rights within a queue*, since classes are the RTFM equivalent of RT queues.

When you are done working with rights, click the `Submit` button at the bottom of the page.

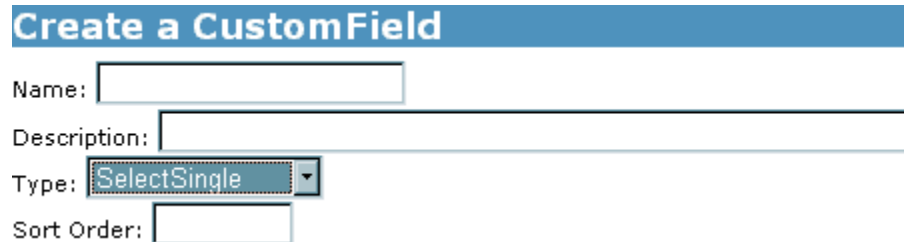
## Custom fields

Custom fields are necessary because RTFM 2.0 doesn't have a "body" section for each article. Everything except for some basic metadata (name, summary, etc.) is a custom field. Custom fields must be associated with classes of articles.

### Creating a custom field

To create a new custom field:

click `Configuration` in the left side nav bar -> click `Custom Fields` -> click `New custom field` -> enter information in the boxes (explained below) -> click the `Submit` button



**Create a CustomField**

Name:

Description:

Type:

Sort Order:

**Name:** the name of the custom field

**Description:** a few words about the custom field that will be displayed under the name

**Type:** There are five types to choose from in the drop-down menu.

`SelectSingle`: the user can select one value from a list. The field is rendered as a box.

`Select Multiple`: the user can select one or several values from a list. The field is rendered as a box.

`FreeformSingle`: the user can type one value. The field is rendered as a text box.

`FreeformMultiple`: the user can type one or several value separated by line breaks. The field is rendered as a text box.

`TextSingle`: the user can type a lot of text, as in the "body" of an article. The field is rendered as a text box.

**Sort Order:** refers to the order in which a list of values appears. For example, assume you have

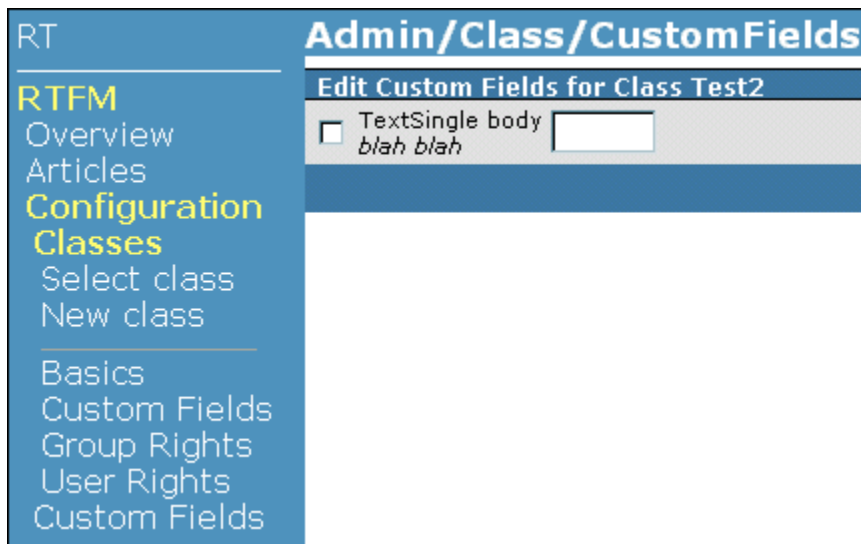
values A, B, and C. If you leave Sort Order alone, the values will appear in the order A, B, C. If you give A the sort order of 2, B a 3, and C a 1, the values will appear in the order C, A, B.

Once you've created a custom field, you have to associate it with a class of articles, as explained in the next section.

### **Associating custom fields with classes**

Now that you've created custom fields, you should associate them with classes. The idea is that Custom Field A can apply to Classes 1, 2 and 6, but not 3, 4, and 5.

click **Configuration** in the left side nav bar -> click **Classes** -> click the class name of your choice -> click **Custom Fields** (the phrase "Custom Fields" appears twice; click the one directly under **Basics**) -> check the checkbox next to the custom field you want to associate with that class -> click the **Submit** button



Now the custom field of your choice is associated with the class of your choice.

### **Editing custom fields**

To change a custom field's Basics:

click **Configuration** in the left side nav bar -> click **Custom Fields** -> click the custom field you want to edit -> change the custom field's name, description, type, or sort order (explained in the *Creating a custom field* section above) -> click the **Submit** button

### **A custom field's rights**

To grant or revoke user or group rights for a custom field:

click **Configuration** in the left side nav bar -> click **Custom Fields** -> click the custom field whose rights you want to administer -> click **Group Rights** or **User Rights** in the left nav bar

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Rights in RTFM work like rights in RT. See the sections about rights in *Chapter 4: Adminning RT* for more detail.

When you are done working with rights, click the `Submit` button at the bottom of the page.

### Adding text to an article's custom field

There are two ways to make an article's custom field say something: enter the desired content yourself, or extract it from an article in RT, since RTFM integrates with RT.

To **add text by hand**, first, click the name of the article of your choice (see the *Searching* section of this documentation if you need help locating an article). The ticket's display screen will show the type of custom field available to this ticket (to add more, associate more custom fields with the ticket's class, as explained earlier in this *Custom fields* section). Then:

click `Modify` in the left hand nav bar -> type (or paste) the desired text in the custom field box that will be named after the custom field and appear between `Class` and `Current Relationships` -> click the `Save Changes` button

To **extract an article** from an RT ticket:

from within any ticket in RT, click `Extract Article` in the upper right of the screen -> click the class you'd like to create the article in

In some cases, you will have an option to select which custom field (TextSingle type only) a ticket transaction, such as a reply or comment, should be extracted to (In other cases, like when the class has no TextSingle custom fields or the ticket has no transactions, there will be nothing to select on this page, and you can proceed to the next step, explained below the screen shot). In this screen shot, the administrator is choosing to extract this ticket's one `Comment` into the custom field "body" -- the comment will appear in the new article. If the administrator does not select a custom field from the dropdown menu, the transaction will not appear in the new article. It will also not appear if, like the `Status Change` in the below screen shot, it has no content.

**Extract article from ticket #3 into class Test2**

Use the dropdown menus to select which transactions you want to extract into a new RTFM article

| Custom field  | Ticket update  |
|---|--|
| <input type="text" value="-"/><br><input type="text" value="body"/> | <b>Thu Apr 10 12:22:12 2003: Comments added by root</b><br><pre>&gt; [root - Wed Apr 02 16:55:35 2003]:<br/>&gt;<br/>&gt;<br/>&gt;<br/><br/>test</pre> |
| <input type="text" value="-"/>                                      | <b>Thu Apr 10 12:22:13 2003: Status changed from new to open by root</b><br><p>This transaction appears to have no content</p>                         |

After using or ignoring this screen, to **continue extracting** the article:

click the `Create` button -> make changes to the new article, if necessary -> click the `Create` button

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You have now created a new RTFM article based on that RT ticket. It now may be modified or deleted like any other article; see the *Using RTFM* section of this documentation if you need help with articles.

Note that there is a function in RT that, when you are replying to or commenting on tickets, allows you to search for and include (editable) RTFM articles in your reply.