

Checklist: Requirements using Redmine effectively

Several prerequisites are necessary for a company to work as productively as possible with Redmine. Our checklist is divided into different phases and will help you.

Phase 1: Data Basis & Configuration

- Data Quality:** Ensure consistent and complete data in tickets (clear descriptions, correct assignments, relevant attachments). Incomplete information leads to delays and inefficiencies. .
- Data Structure:** A well-designed ticket categorization, status management, and custom fields are necessary to keep information clear and searchable.
- Data Integration:** Utilize the API for connections to other systems (e.g., CRM, monitoring tools) for a holistic overview and automated workflows.
- Data Backup & Security:** Regular, automated backups and security measures to protect ticket and user data are crucial. Develop a concept for this.
- Data Privacy:** Compliance with data protection regulations (e.g., GDPR) is paramount. Data must be stored and processed securely to minimize risks. Ensure a current system.

Phase 2: Infrastructure & Technology

- System Performance:** Ensure a sufficiently powerful server to guarantee fast loading times and stable performance, especially with many users and tickets.
- Access & Availability:** Access to Redmine should be available to authorized users at any time and from anywhere.
- Usability:** Use a custom theme, possibly in corporate branding. Optimize/minimize functionality. Only use plugins and Redmine features that allow employees to work quickly and effectively with the system. Training and documentation are important.

Phase 3: Processes & Organization

- Clear Processes:** Define workflows for ticket processing (responsibilities, escalation levels, SLAs).
- Roles & Permissions:** Clear role definition and access control are essential to ensure security and efficiency.
- Regular Reviews:** Schedule continuous review and adjustment of processes and system configuration to identify and resolve inefficiencies.
- Communication:** Clearly defined communication channels within the team and with customers.
- Documentation:** Utilize the Redmine Wiki for a well-maintained knowledge base to accelerate problem-solving.

Phase 4: Leadership & Culture

- Acceptance & Training:** Employees must understand and accept the system. Comprehensive training and ongoing support are important.
- Feedback Culture:** Integrate regular feedback loops to continuously improve the system and processes.
- Goal Orientation:** Define clear goals for how the ticketing system should contribute to improving productivity and customer satisfaction (e.g., reducing processing time, increasing customer satisfaction).

A productive ticketing system results from a combination of technical equipment, well-defined processes, and a supportive company culture. Only in this way can Redmine (or a comparable system) reach its full potential.