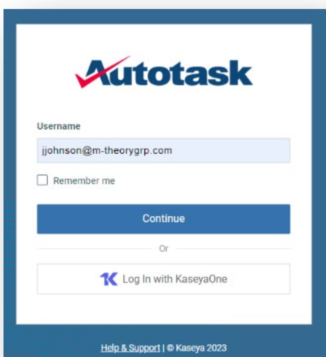
Logging into AutoTask

You will be assigned login credentials by your supervisor or manager. To use them, visit the AutoTask web site at:

https://ww15.autotask.net/Mvc/Framework/Authentication.mvc/Authenticate

<table>
<tr><th>Enter User Name</th><th>Enter Password</th><th>Enter MFA Code</th></tr>
<tr>
<td>
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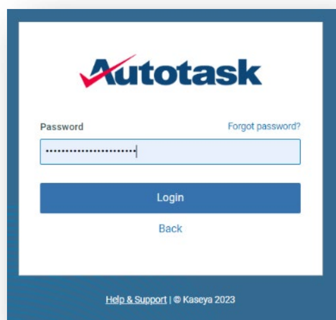
<td>
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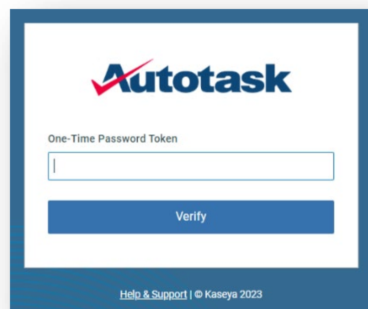
<td>
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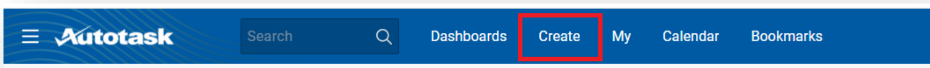
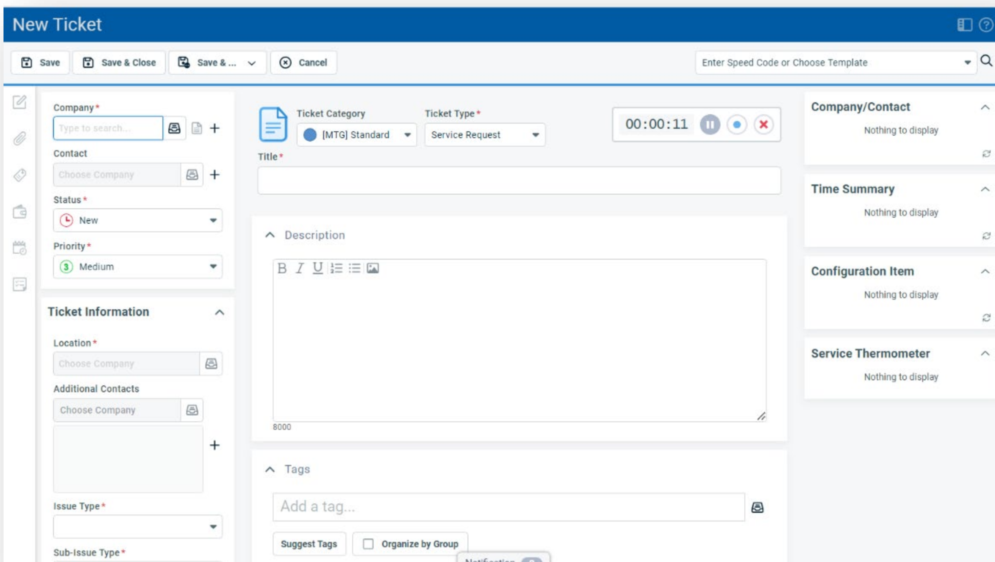
Opening a New Ticket

To open a new ticket, click the “Create” button on the task ribbon.



The New Ticket Window Opens.



Ticket Body

Ticket Field	Explanation
Ticket Category	This field displays the various templates available to your organization. It will default to “[MTG] Standard.” Do not change this field unless instructed to do so.
Ticket Type	This field displays the various types of tickets available in the Auto Task system. It will default to “Service Request.” Do not change this field unless instructed to do so.
Title	This briefly describes the subject of the ticket. If the ticket has been generated by an email received from a customer, the subject of the email message becomes the ticket title.

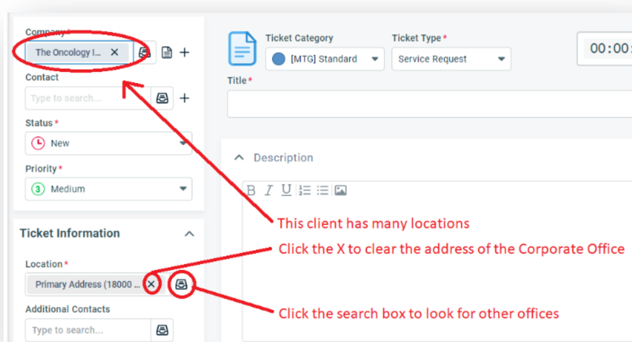
Ticket Description

The ticket description is the main body of the ticket. If the ticket has been created via a customer email, the body of the email becomes the ticket description. When logging a ticket, it is best to make certain that the ticket description contains all necessary information that will be needed to resolve the ticket. The customer can see the contents of this field.

Company and Contact Information

The Company field displays the name of the company for whom the customer works. When selecting a company, the "Location" field will fill in automatically with the primary street address of the company (this is typically the corporate office.) The Contact field displays the name of the customer. This is the person that will receive status updates on the ticket.

It is important to check the "Location" field for each ticket! Remember that a company may have multiple locations, and the customer is not necessarily calling directly from the Corporate office. If an on-site visit were to be necessary, the on-site technician would drive to the street address shown in the "location" field. It *must* be correct.



If you are unable to find a specific office location, alert your supervisor or manager. They can have the location reviewed to see if it needs to be added into AutoTask. The following information will be required:

- Name of office
- Street address
- City, State, Zip
- Office telephone number (for the front desk or receptionist)

Ticket Status

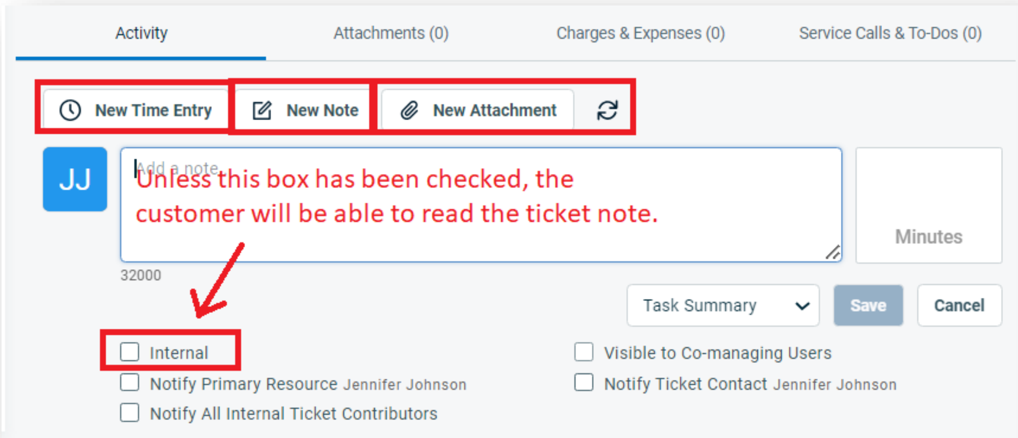
Ticket Status	Example
New	This ticket has just been created. Work has not yet begun on it.
Assigned	This ticket has been triaged to a technician.
Customer Note Added	A customer has responded to the automated email that was sent to them from the AutoTask ticketing system. Their note has been appended to the ticket.
In Progress	Work has begun on this ticket, but is not yet complete.
Escalate	This ticket has been referred to another technician or department via the escalation process.
Waiting Customer	This ticket cannot be completed until input is received from the customer.
Waiting Materials	This ticket cannot be completed until input is received from Procurement.
Waiting Vendor	This ticket cannot be completed until input is received from a vendor.
On Hold	This ticket is waiting for something. The reason for the hold on the ticket must be explained in the ticket notes.
Complete	Work has been completed for this ticket.
RMM Resolved	This ticket has auto-resolved due to the execution of a rule in Auto Task.

Ticket Priority

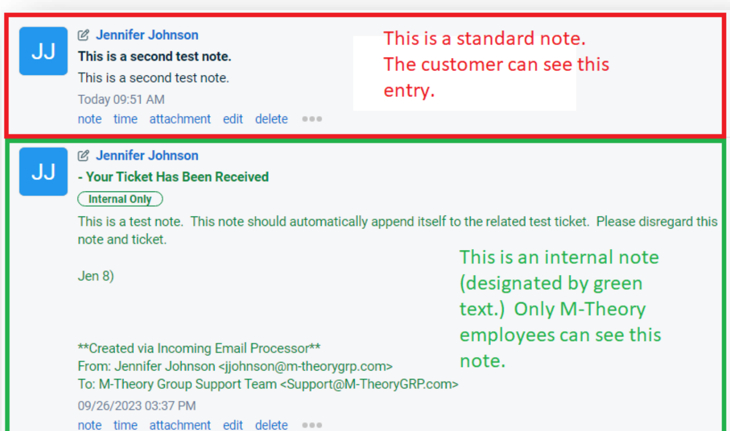
Each ticket is also assigned a priority level. Priority levels are as follows:

Priority Level	Example
Critical	An entire work site is down, such as with an internet or power outage. Many users are affected. Work at the site has either been completely halted or is severely curtailed. This is the highest possible priority.
High	The reported problem affects only a single user, or a small group of users, but is stopping all work. A work-around is unavailable or impractical. An example might be a burned-out monitor which renders a single computer unusable, or a downed server that prevents all logins to a specific application.
Medium	The problem affects a single user, and a workaround is available. For example, a printer might be down while a toner cartridge is replaced, but the customer can use a different printer until the toner arrives.
Low	This is usually reserved for scheduled maintenance, or for an event that will occur in the future. An example of a low-priority ticket might be: "There will be a guest speaker at the upcoming accounting meeting. We need IT to set up the projector in the meeting room next Wednesday by 3PM."

Ticket Notes



Once a ticket has been saved, the "notes" field will become available. (This field does not appear on a newly-opened ticket until all fields have been filled out, and the ticket has been saved and a ticket number has been generated.) Important: the customer can see any note added into the "notes" field, unless the "internal" box has been checked.

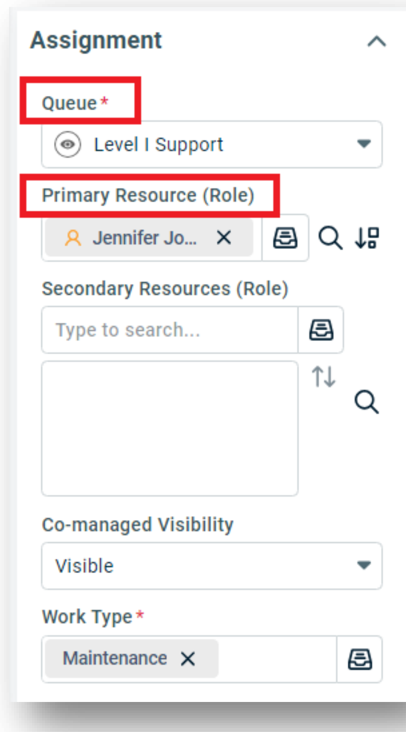


Note: the "New Attachment" button here will attach a document to the *ticket only*. This button *will not add an attachment to an email message.* In order to add an attachment to an email message, use the "New Attachment" button on the "Add Timestamp" screen (pictured below.)

Assigning the Ticket

Ticket Field	Explanation
Queue	Queues are used to group together tickets with something in common and resources who can work on those tickets.
Primary Resource	The Primary Resource is the person who is responsible for completing the task or ticket.

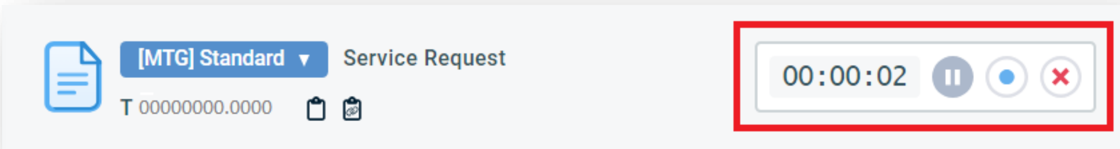
To assign a ticket to a specific technician, it is first necessary to select the queue. Different technicians are associated with different queues, and if the incorrect queue has been selected, the name of the technician may not appear.



Closing a Ticket

Ticket Timer

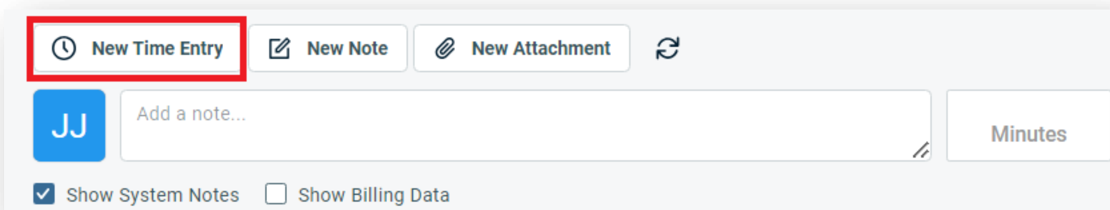
Each ticket that is opened has a timer. This timer is used to track the amount of time that a technician spends working upon the problem that the ticket describes. As long as you are working on a ticket, this timer ***should be running***. Do not turn the timer off!



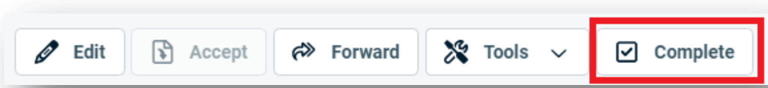
Logging Your Time

Each ticket that is opened has a timer. This timer should be running whenever a technician is working on the ticket. Once the technician has completed their work session, this time will need to be logged, regardless of whether or not the ticket has been resolved. Each ticket can accommodate as many timestamps as needed. Use these controls to log a timestamp.

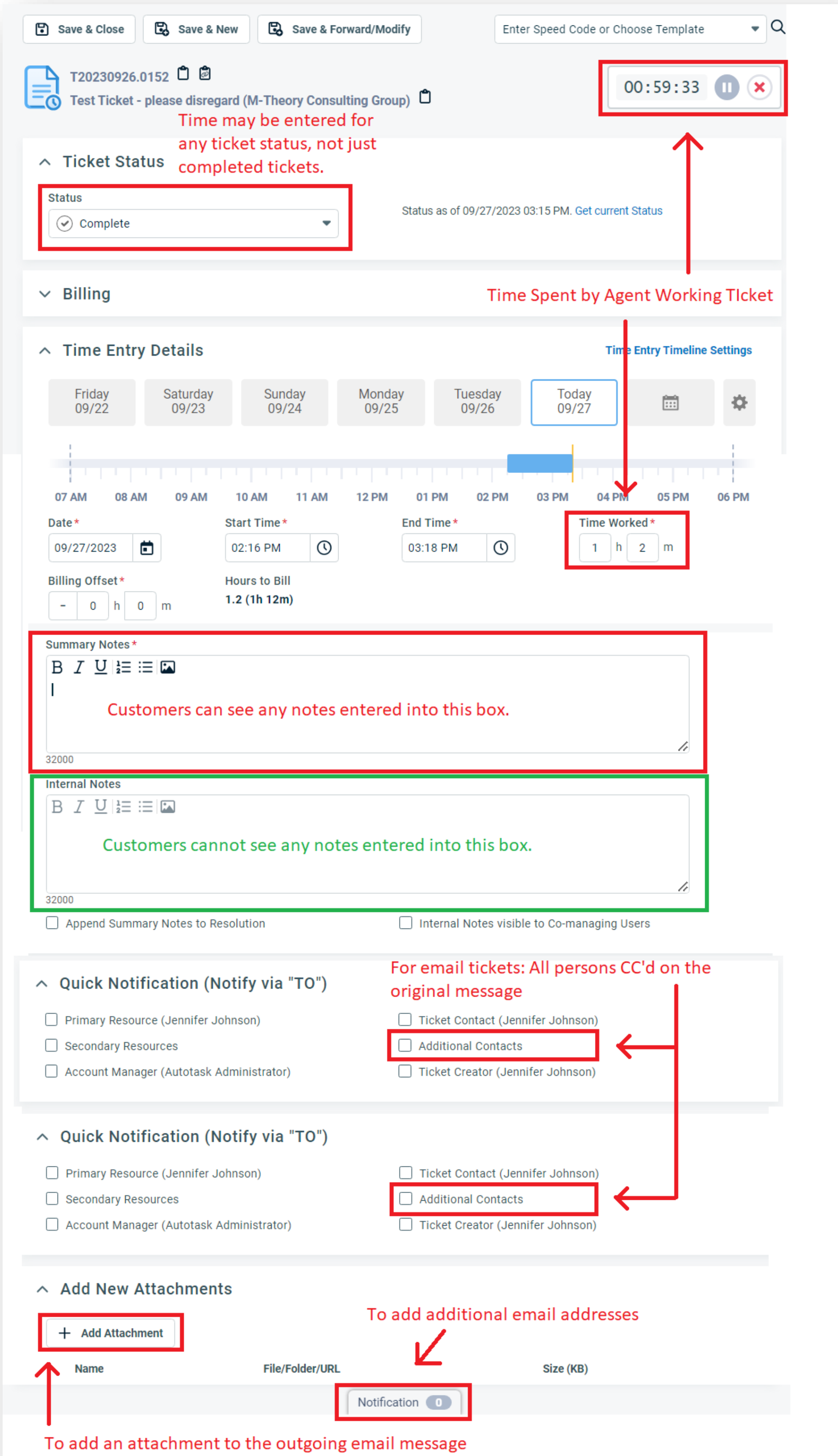
- *New Time Entry*



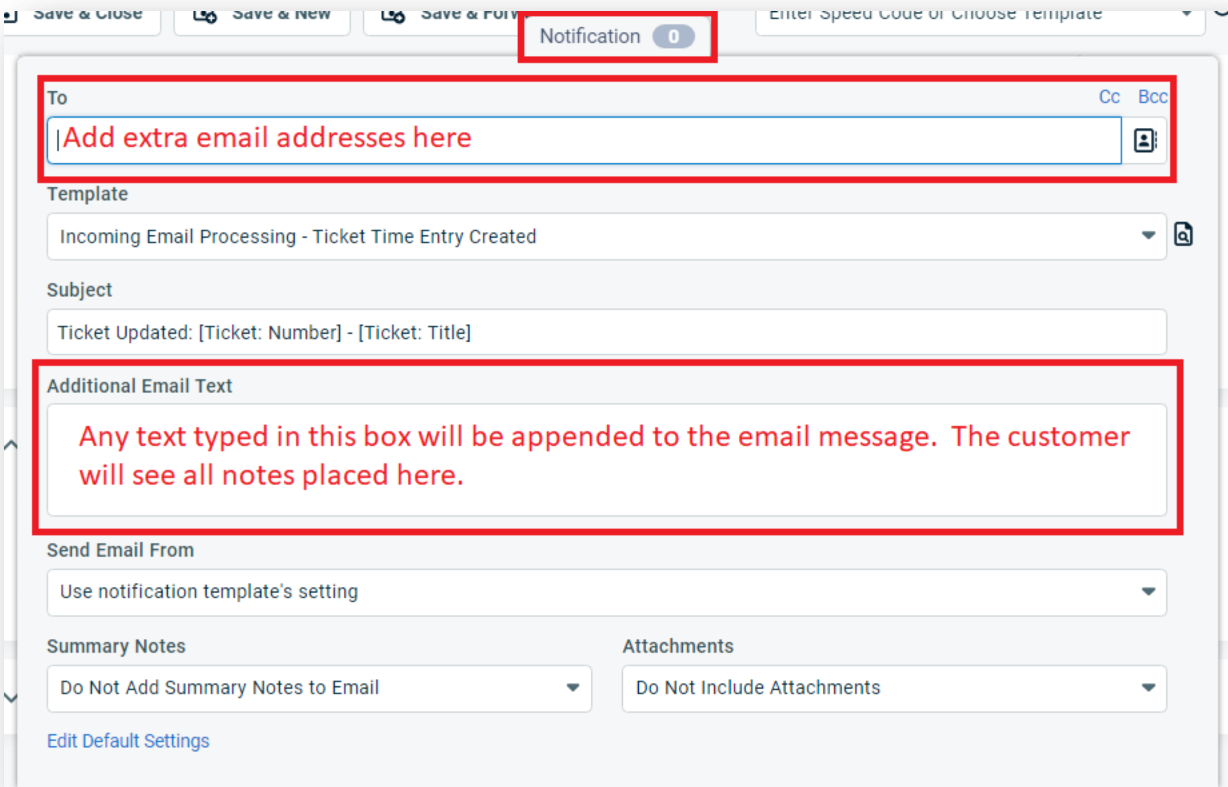
- *Complete the Ticket*



If the time entry screen has been selected via the “complete” button, selecting the “save and close” button will complete the ticket. Otherwise, the “save and close” button will close only the popup window, returning the agent to the main ticket, with time recorded.


Save & Close
Save & New
Save & Forward/Modify
Enter Speed Code or Choose Template
T20230926.0152
Test Ticket - please disregard (M-Theory Consulting Group)
00:59:33
Time may be entered for any ticket status, not just completed tickets.
Ticket Status
Status
Complete
Status as of 09/27/2023 03:15 PM. Get current Status
Billing
Time Spent by Agent Working TIcket
Time Entry Details
Time Entry Timeline Settings
Friday 09/22
Saturday 09/23
Sunday 09/24
Monday 09/25
Tuesday 09/26
Today 09/27
07 AM 08 AM 09 AM 10 AM 11 AM 12 PM 01 PM 02 PM 03 PM 04 PM 05 PM 06 PM
Date*
09/27/2023
Start Time*
02:16 PM
End Time*
03:18 PM
Time Worked*
1 h 2 m
Billing Offset*
- 0 h 0 m
Hours to Bill
1.2 (1h 12m)
Summary Notes*
Customers can see any notes entered into this box.
32000
Internal Notes
Customers cannot see any notes entered into this box.
32000
Append Summary Notes to Resolution
Internal Notes visible to Co-managing Users
Quick Notification (Notify via "TO")
For email tickets: All persons CC'd on the original message
Primary Resource (Jennifer Johnson)
Secondary Resources
Account Manager (Autotask Administrator)
Ticket Contact (Jennifer Johnson)
Additional Contacts
Ticket Creator (Jennifer Johnson)
Quick Notification (Notify via "TO")
Primary Resource (Jennifer Johnson)
Secondary Resources
Account Manager (Autotask Administrator)
Ticket Contact (Jennifer Johnson)
Additional Contacts
Ticket Creator (Jennifer Johnson)
Add New Attachments
Add Attachment
To add additional email addresses
Name
File/Folder/URL
Size (KB)
Notification 0
To add an attachment to the outgoing email message

Use the "notifications" screen to add any extra addresses that may not already be included in the ticket. In the "Notifications" window, the "to" field will allow the selection of contacts that have already been saved into AutoTask, but it will also permit addresses to be manually entered.



Once these fields have been completed, hit the "save and close" button to close window and continue to the next ticket.