



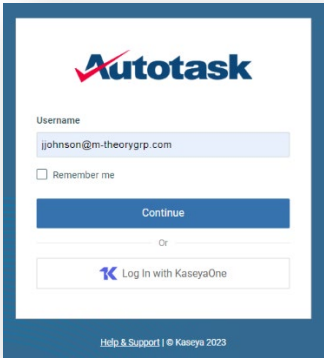
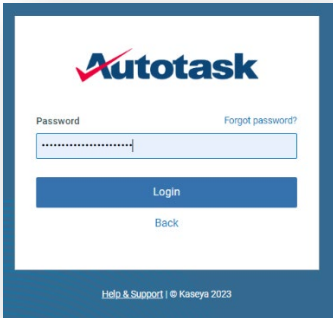
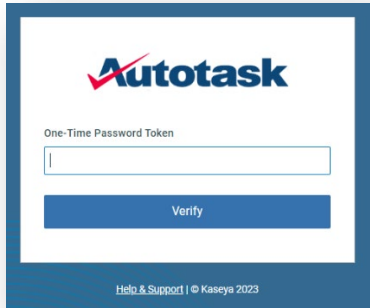
How to Open a New Ticket

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Logging into AutoTask

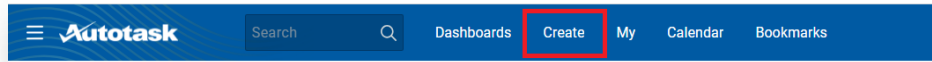
You will be assigned login credentials by your supervisor or manager. To use them, visit the AutoTask web site at:

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

Enter User Name	Enter Password	Enter MFA Code
		

Opening a New Ticket

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



The New Ticket Window Opens.

 A screenshot of the 'New Ticket' window in the Autotask application. The window has a blue header with the title 'New Ticket'. Below the header is a toolbar with buttons for 'Save', 'Save & Close', 'Save & ...', and 'Cancel'. To the right of the toolbar is a search bar with the placeholder text 'Enter Speed Code or Choose Template'. The main area of the window is divided into several sections. On the left, there are fields for 'Company', 'Contact', 'Status' (set to 'New'), and 'Priority' (set to 'Medium'). Below these are 'Ticket Information' fields including 'Location', 'Additional Contacts', 'Issue Type', and 'Sub-Issue Type'. The central part of the window contains a 'Ticket Category' dropdown (set to '[MTG] Standard'), a 'Ticket Type' dropdown (set to 'Service Request'), a 'Title' field, and a large 'Description' text area with a rich text editor toolbar. To the right of the description area are 'Tags' and a 'Notification' button. On the far right, there are several collapsible panels: 'Company/Contact', 'Time Summary', 'Configuration Item', and 'Service Thermometer', each showing 'Nothing to display'.

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.

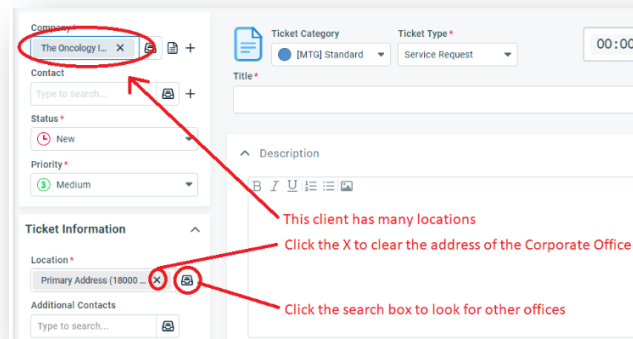
Ticket Description

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

Activity Attachments (0) Charges & Expenses (0) Service Calls & To-Dos (0)

New Time Entry New Note New Attachment

JJ

32000

Unless this box has been checked, the customer will be able to read the ticket note.

Internal

Visible to Co-managing Users

Notify Primary Resource Jennifer Johnson

Notify All Internal Ticket Contributors

Notify Ticket Contact Jennifer Johnson

Task Summary Save Cancel

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.

JJ Jennifer Johnson

This is a second test note.

This is a second test note.

Today 09:51 AM

note time attachment edit delete ...

This is a standard note.

The customer can see this entry.

JJ Jennifer Johnson

- Your Ticket Has Been Received

Internal Only

This is a test note. This note should automatically append itself to the related test ticket. Please disregard this note and ticket.

Jen 8)

This is an internal note (designated by green text.) Only M-Theory employees can see this note.

Created via Incoming Email Processor

From: Jennifer Johnson <jjohnson@m-theorygrp.com>

To: M-Theory Group Support Team <Support@M-TheoryGRP.com>

09/26/2023 03:37 PM

note time attachment edit delete ...

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.

Assignment

Queue *

Level I Support

Primary Resource (Role)

Jennifer Jo... X

Secondary Resources (Role)

Type to search...

Co-managed Visibility

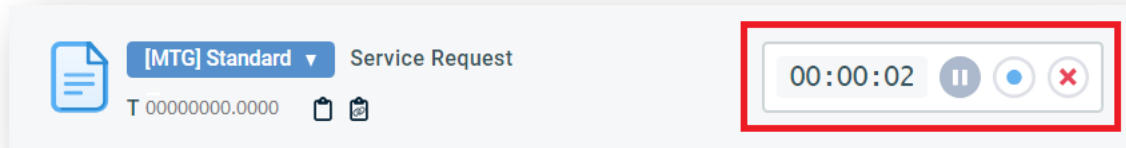
Visible

Work Type *

Maintenance X

Closing a Ticket*Ticket Timer*

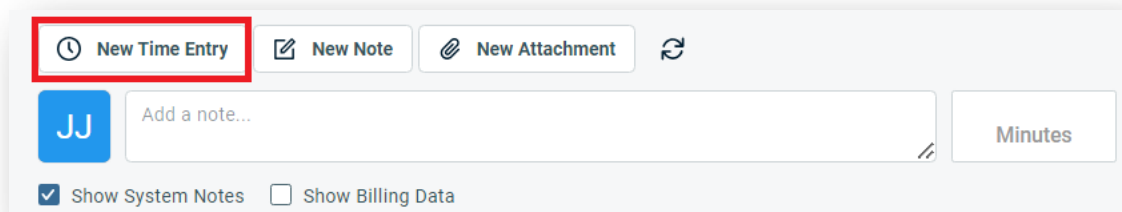
Each ticket that is opened has a timer. This timer is used to track the amount of time that a technician spends working upon the problem that the ticket describes. As long as you are working on a ticket, this timer ***should be running***. Do not turn the timer off!



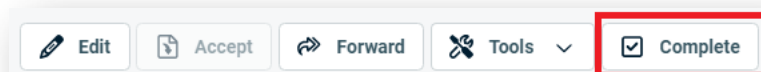
Logging Your Time

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 *

B I U

Customers can see any notes entered into this box.

32000

Internal Notes

B I U

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")

☐ 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")

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☐ Ticket Creator (Jennifer Johnson)

Add New Attachments

+ Add Attachment

Name File/Folder/URL Size (KB)

Notification 0

To add additional email addresses

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.

Save & Close Save & New Save & Forward Notification 0 Enter Speed Code or Choose Template

To Cc Bcc

Add extra email addresses here

Template

Incoming Email Processing - Ticket Time Entry Created

Subject

Ticket Updated: [Ticket: Number] - [Ticket: Title]

Additional Email Text

Any text typed in this box will be appended to the email message. The customer will see all notes placed here.

Send Email From

Use notification template's setting

Summary Notes Attachments

Do Not Add Summary Notes to Email Do Not Include Attachments

Edit Default Settings

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