



09/03/2024

Autotask Reporting Update

At Charm team, we have been reviewing the reporting which is being produced from Autotask. It is time to revamp this reporting to better meet the reporting requirements of our customers. The accompanying documentation presents the specific details that are to be changed.

Why revamp reporting?

There are two data points that our clients especially want to see, and our current reporting fails to capture them.

- Why did the client's customers call the Help Desk?
- What did the Help Desk do to resolve the problem their callers presented?

While the infrastructure is present in Autotask to be able to answer these questions, and our Help Desk personnel have been trained how to use the ticketing system, the field selections they currently have are inadequate to obtain this data. Our field selections have been in place since Autotask was first launched more than a year ago, and are now outdated. Small fixes, such as making minor changes to dropdown menus, will not be enough to drive the level of change that we need.

What changes will be made?

Modify the Issue/Sub-Issue type fields

The Issue/Sub-Issue fields that drive our reporting will be completely revamped, top to bottom. Some old selections that are still relevant will be kept; old and outdated selections will be removed; new selections that aren't currently being tracked will be added.

It is important to emphasize that this specific change will affect all reporting for all clients. Clients will need to be notified of the upcoming changes, Help Desk agents will need to be trained, and a definite date will need to be selected for the change to be made (this date should be the last day of the month, so that reporting can begin with the new fields on the 1st of the following month.)



Add new custom supporting fields

The changes in the Issue/Sub-Issue fields will be supplemented by additional custom fields. These fields will be:

- Why did the customer call
- What solution did the Help Desk present
- Specific drill-downs (type of application, type of hardware, etc.)

Additional Supporting Fields:

- Contract and Work Type fields
Contract and work type fields will allow tickets to automatically be classified for billing purposes. Additional charges incurred by customers will automatically be routed to be reviewed and billed.
- Revamped Insights Column
The Insights column, visible on all tickets, will be revamped to allow Help Desk agents to more easily see ticket contracts, and also to spot trends (for example, an office location which repeatedly calls to report the same type of recurring issue.)
- Revamped Default Ticket Category
All tickets are currently logged against the default category, MTG Standard. This default category will be retired, and the new ticket category will be implemented in its place. This new ticket category will contain all of the changes and fields noted above. All tickets for all clients will be logged against the new ticket category.
- Custom Reports:
The custom reports that are currently available in Autotask will be revamped to reflect the ticket field changes.

Please direct any questions about the new changes to CHARM team, and we will be happy to assist you.