Client Portal and Taskfire User Guide

Updated 9/6/2016

Table of Contents

Welcome to the Client Portal!

Our Client Portal is a secure web site that gives you access to your company's records in our Autotask database.

The level of access for each user is controlled by the security level assigned to them. There are two kinds of security levels: Standard Client Portal, and Taskfire.

What you can do with a standard Client Portal security level

The standard Client Portal lets you create tickets (a.k. a. "Service Requests") and monitor tickets and projects. Depending on your security level, you can:

- Submit tickets directly into our ticketing system
- Monitor the progress of previously submitted tickets and projects and review our staff's notes and time entries
- Add notes and attachments of your own
- Grant approvals for proposed work online
- Run reports
- View invoices
- If you are a company we bill for work done for another company (the "End Client"), you can review the work we did for the end client. You can find more on that in the topic "Monitor End Client Tickets and Projects" on page 101.

What you can do with a Taskfire security level

Taskfire is an extension of the standard Client Portal. You get all the standard features plus your own internal help desk. This is a great solution for customers who have their own IT resources, but do not have the capacity to deal with everything. Taskfire is perfect for coordinating the work between your company and ours, and even your headquarters and subsidiaries. You can:

- Create tickets and assign them to your internal resources
- Have your internal resources track their work
- Escalate tickets to us manually, and configure auto-escalation rules based on issue types, time of day and out of office settings
- Share work between your company's locations

- Add other vendors to you client portal. This lets you keep track of tickets for maintenance crews, utility companies, Internet service providers and others.

You can assign Taskfire licenses to your IT staff, and standard Client Portal licenses to everyone else. For more information about security levels, refer to "Security Level Permissions " on page 7.

Getting started

All users should watch Using Client Portal (available in English only)

Taskfire users should also watch Using Taskfire (available in English only)

- The first time you log in you should "Edit Your Profile" on page 4 and "Change Your Password" on page 6.
- The Client Portal is a Cloud-based application delivered in your browser. If things don't work as described in this Help file, you may want to "Configure Your Browser Settings" on page 7.
- If you don't have access to all the features you need, check with your Client Portal manager about the "Security Level Permissions " on page 7. You can check your current level and permissions on the Edit Profile page.
- To get an overview of the navigation, refer to "Navigate the Client Portal" on page 9.
- To dive right in, click "Create a Ticket" on page 45 on the landing page and see how easy it is!
- Everything else is covered in this online Help system. If you are on a page that displays a question mark in the top right corner, you can click it to get context-sensitive help for that topic.

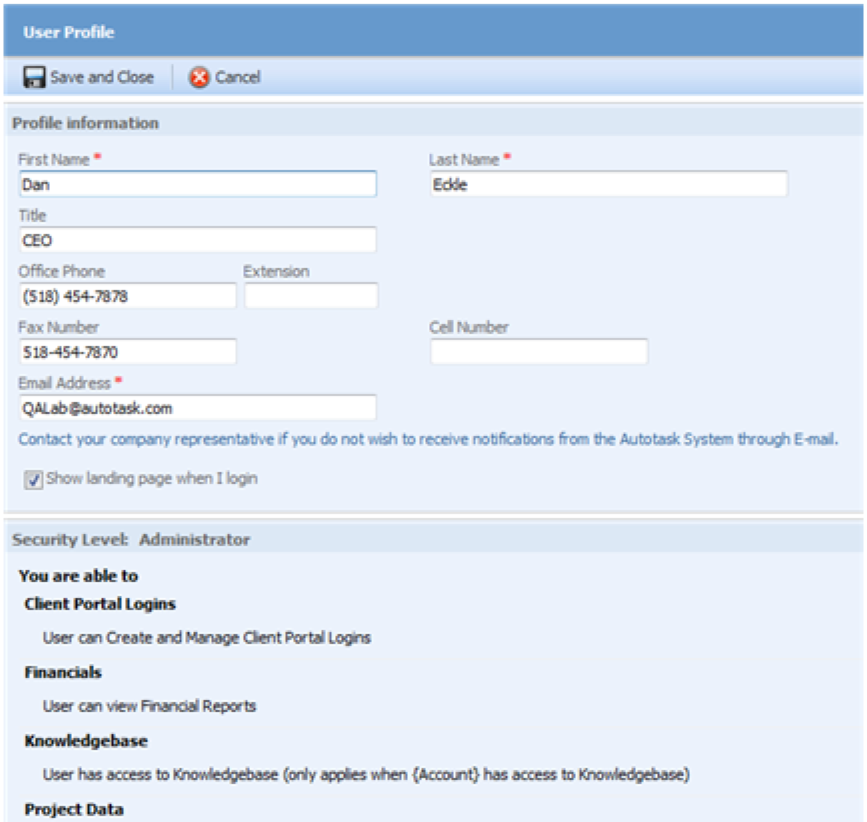
Edit Your Profile

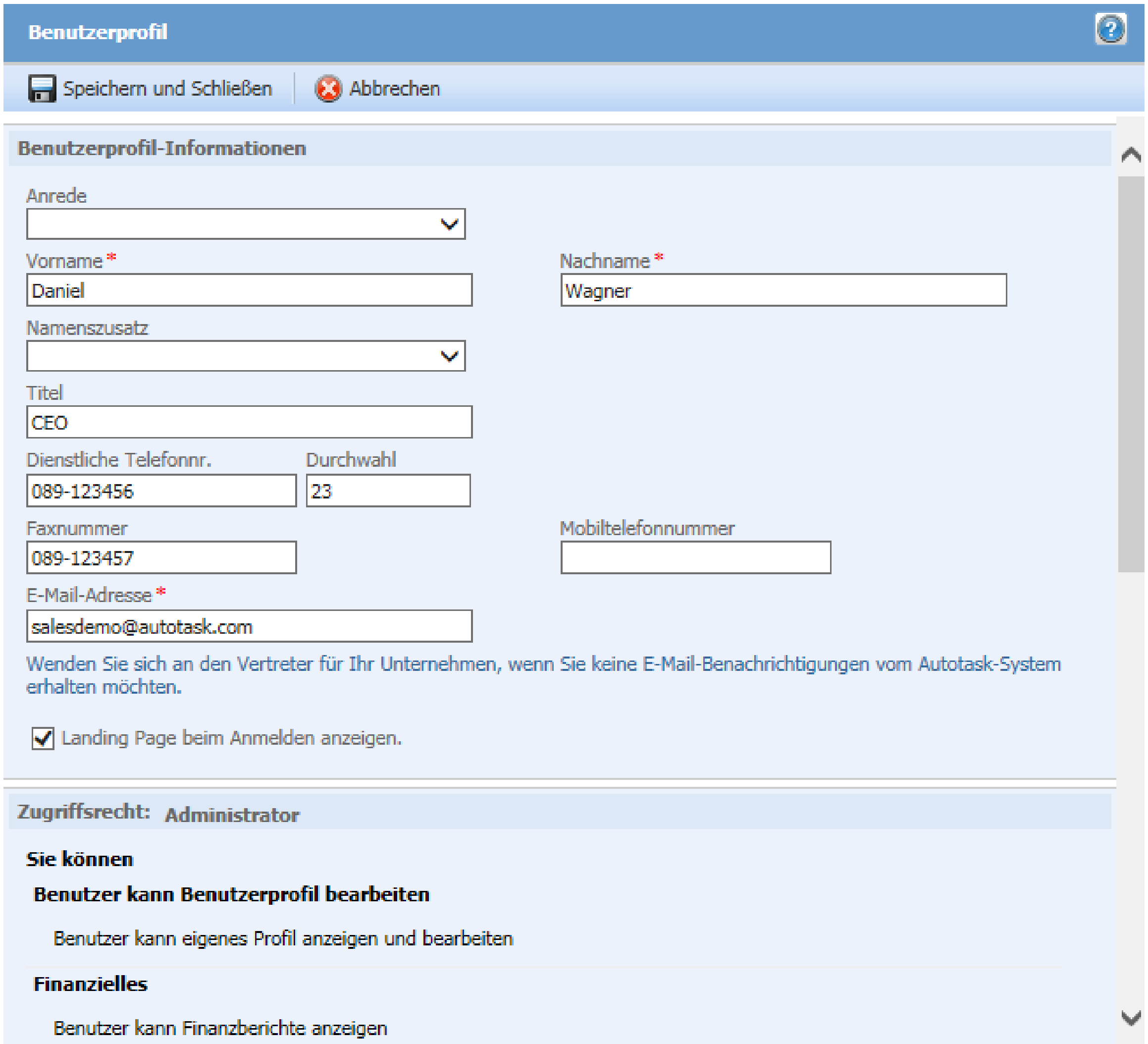
All users

On any Client Portal page, click Edit Profile

All users can view and edit their Client Portal user profile and view the permissions included with their assigned security level.

1. Click the **Edit Profile** link at the top of the Client Portal to open the User Profile window.


User Profile
Save and Close
Cancel
Profile information
First Name *
Dan
Last Name *
Eckle
Title
CEO
Office Phone
(518) 454-7878
Extension
Fax Number
518-454-7870
Cell Number
Email Address *
QALab@autotask.com
Contact your company representative if you do not wish to receive notifications from the Autotask System through E-mail.
Show landing page when I login
Security Level: Administrator
You are able to
Client Portal Logins
User can Create and Manage Client Portal Logins
Financials
User can view Financial Reports
Knowledgebase
User has access to Knowledgebase (only applies when {Account} has access to Knowledgebase)
Project Data



2. Review and edit your profile information. Note that fields with a red asterisk are required.
3. Scroll down to view your security level permissions.
4. Click **Save and Close**.

Change Your Password

All Users

On any Client Portal page, click Change Password

To change your password:

1. Click the **Change Password** link at the top of the Client Portal to access the Change Password window.
2. Type your current password.
3. Type a new password.

Passwords must be between 5 and 50 alphanumeric characters. Spaces and single quotes are not allowed.

4. Type your new password again to confirm.
5. Click **Save and Close**.

Configure Your Browser Settings

All users

Please refer to the online version of this help file.

Security Level Permissions

Security levels determine what actions standard users and Taskfire users can perform in the Client Portal, and what tickets and projects they can access.

There are three standard Client Portal and two Taskfire system security levels. If the default security levels do not meet your needs, we can create a custom security level for your company.

Security Level Permissions:

Action		Basic	Advanced	Manager	Taskfire Resource	Taskfire Administrator
You have access to:	Tickets you submitted or for which you are the ticket contact	•	•	•	•	•
	Projects on which you are a team member	•	•	•	•	•
	All tickets, including Subsidiary Tickets		•	•	•	•
	All projects at their organization		•	•	•	•

Action		Basic	Advanced	Manager	Taskfire Resource	Taskfire Administrator
Tickets Data actions permitted	Create new Tickets (Service Requests), and add Notes and Attachments	•	•	•	•	•
	Can view Service Provider Priority				•	•
	Can set Service Provider Priority on ticket creation.	•	•	•	•	•
Project actions permitted	View project schedule	•	•	•	•	•
	Email members of the project team	•	•	•	•	•
	View /add project notes	•	•	•	•	•
	View project attachments	•	•	•	•	•
	View project calendar items	•	•	•	•	•
	View project tasks you are assigned to	•	•	•	•	•
	Add issues	•	•	•	•	•
	View project charges			•	•	•
	View estimated hours			•	•	•
Profile	View/edit your own profile	•	•	•	•	•

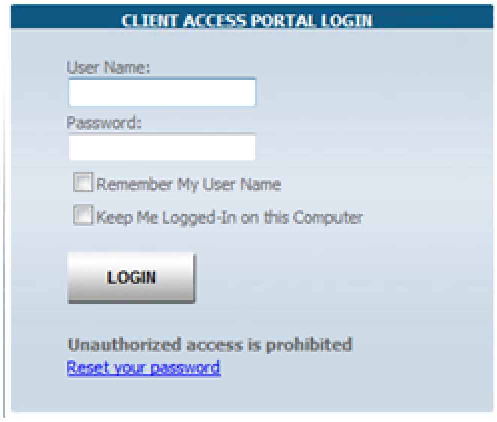
Action		Basic	Advanced	Manager	Taskfire Resource	Taskfire Administrator
Portal Admin	Create and manage Client Portal Users			•	•	•
	Create and manage Queues					•
	Create and manage Request Type Preferences					•
	Create and manage Vendors					•
	Create and manage Out of Office Settings					•
	Create and manage Scheduled Off Hours					•
Knowledgebase	Access Knowledgebase (if Know-ledgebase is turned on for your company). Only articles marked "public" can be seen by a client user.	•	•	•	•	•
Reports	View Invoice and Block Hour Reports			•		•

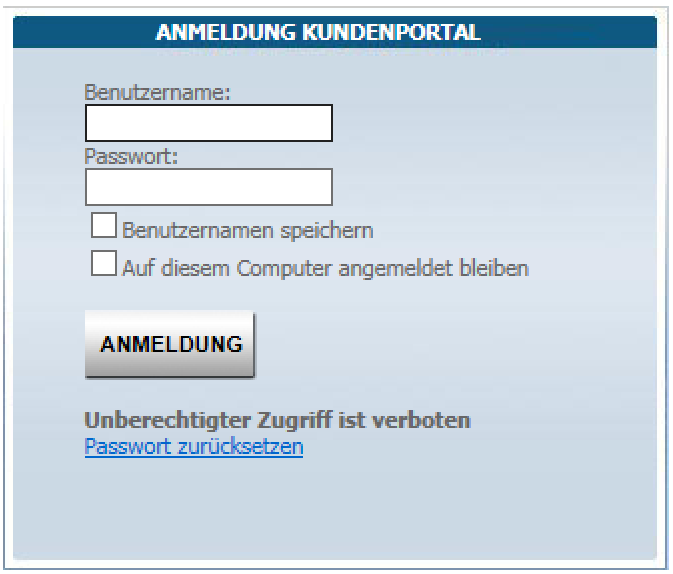
Navigate the Client Portal

All users

Logging in

Log in using the URL, User Name and Password you received in your Welcome email.



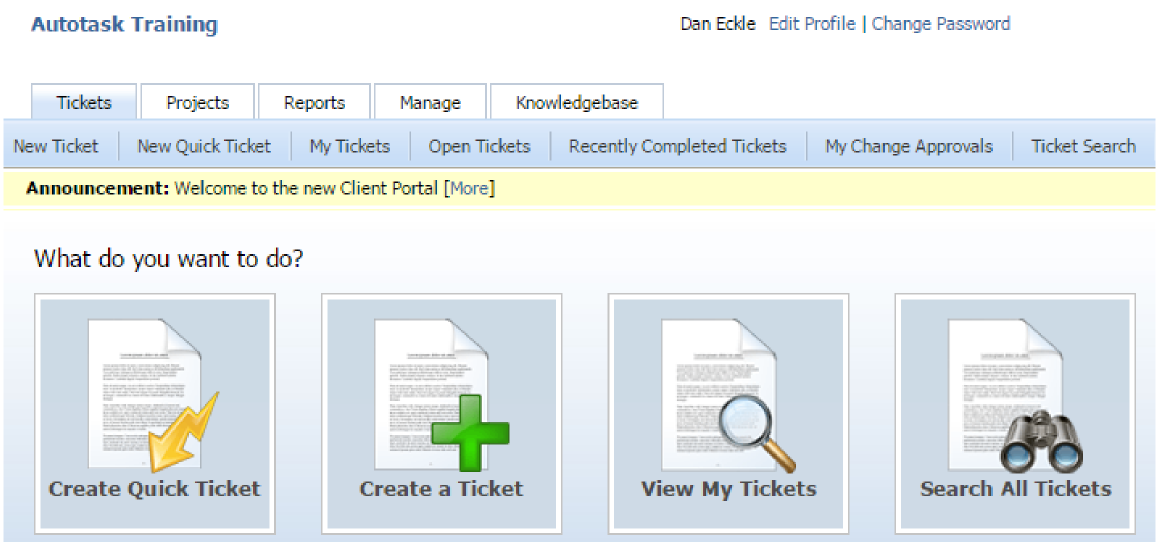


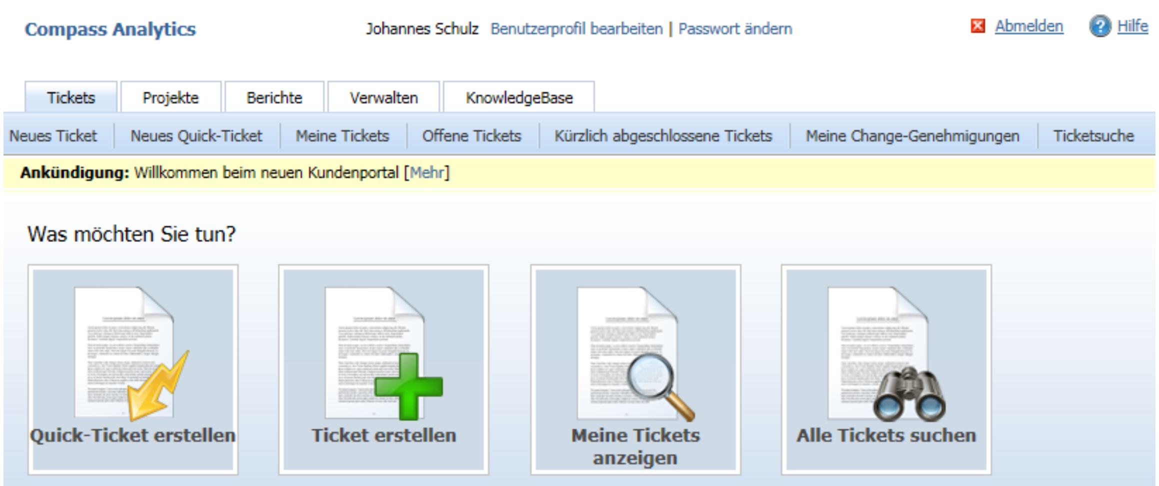
You can choose to have the portal store your log-in credentials for future visits.

- Select **Remember My User Name** to have Client Portal automatically populate this field when you access the log-in page. You will have to specify your password.
- Select **Keep Me Logged-in on this Computer** to have Client Portal automatically populate both fields when you access the log-in page. You just click **LOGIN**.

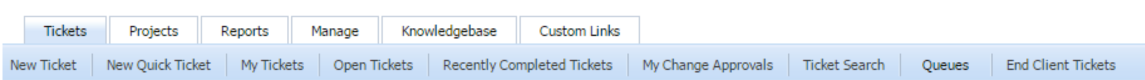
The Landing page

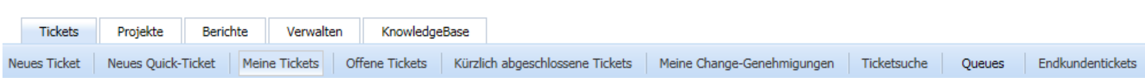
When you log in to the Client Portal your first stop is your **Landing Page**, with buttons for some of the most frequent actions. Just click an option to go! If you want to hide this landing page, select the check mark at the bottom of the page.





Tickets





All open tickets you submitted or are a contact or resource on appear on the **My Tickets** page. Here, you can review our progress on the issue, and view any notes or attachments we have added, and add your own notes and attachments.

You can find other tickets using the pre-configured ticket filters on the Tickets drop-down menu and sub-navigation bar. Access to the Open Tickets selection is controlled by your Security Level.

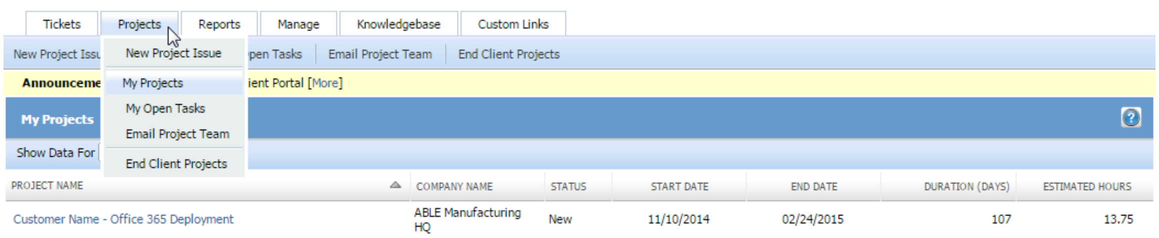
You can also search for tickets by keyword or ticket number using the **Ticket Search**.

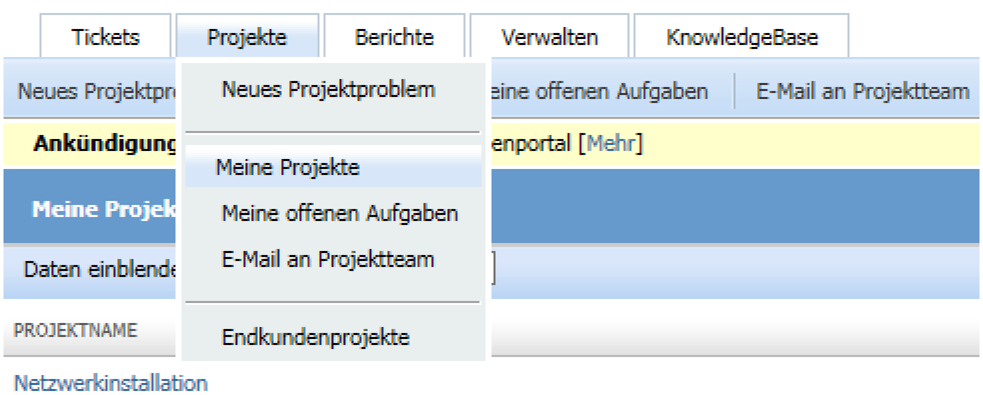
If the Change Management feature is enabled, you will see an additional button, **My Change Approvals**. Click this button to view a list of all tickets awaiting your approval or that you have approved or rejected. It will not display tickets whose Service Provider Status is Complete.

If your company is listed on any of our contracts as the "Company to bill", you will see an additional option, **End Client Tickets**. Click this button to view a list of all tickets where your company is the Company to bill. For additional information, see "End Client Tickets" on page 101.

Projects

The Project tab provides access to project information, including tasks and issues, team members, schedules, notes, estimated hours, the project calendar, and project charges (if your Security Level allows this).

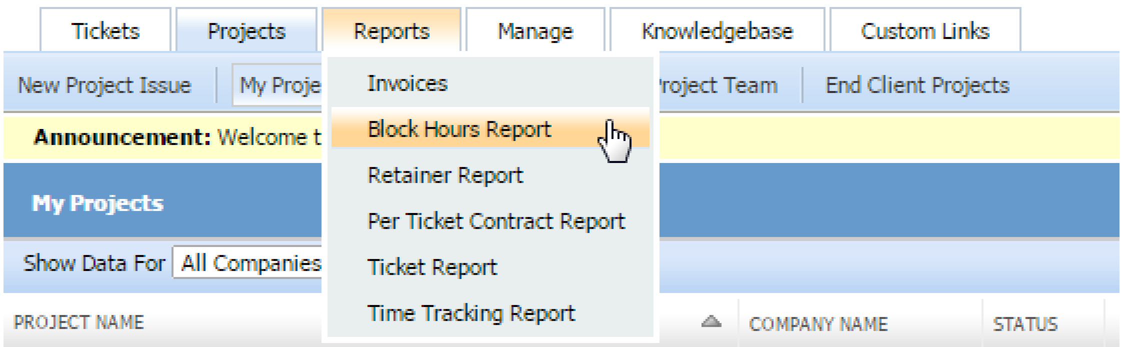


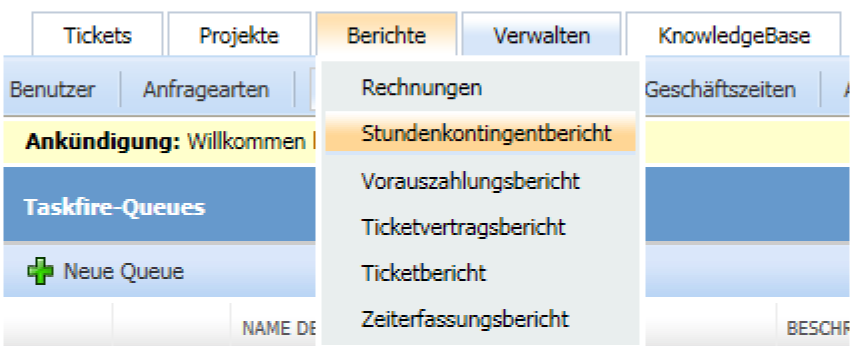


If your company is listed on any of our contracts as the "Company to bill", you will see an additional button, End Client Projects. You can click this button to view a list of all projects where your company is the Company to bill. For additional information, see "End Client Projects" on page 103.

Reports

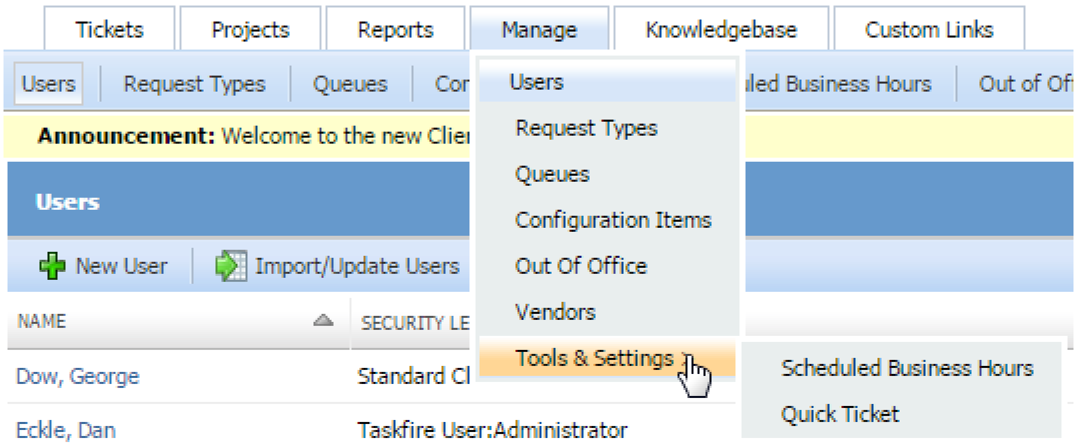
The Reports tab provides access to financial reports for your company. Access to this tab is controlled by your Security Level.

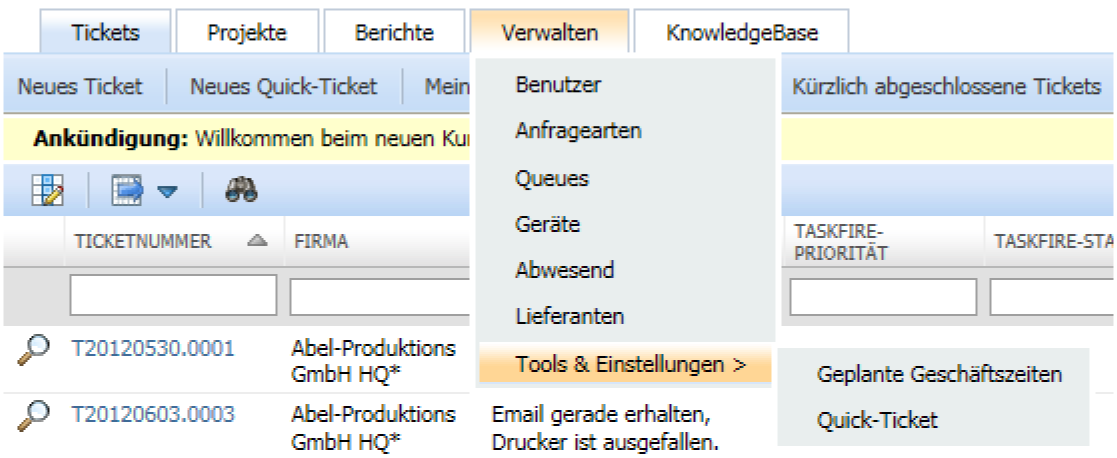




Manage

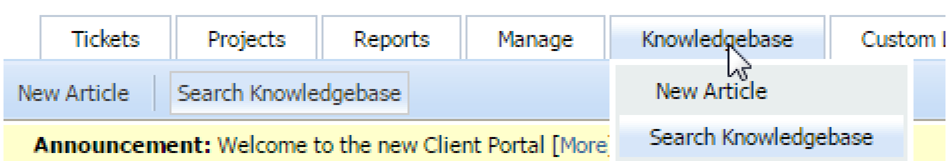
Users with a Client Portal Manager or Taskfire security level can manage Client Portal users for their company. Taskfire Administrators have access to all the other settings to configure their internal help desk workflow. Refer to "Manage Your Client Portal" on page 16 for details.

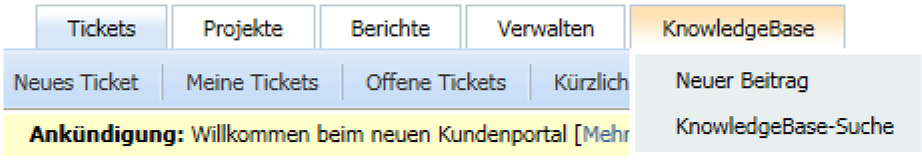




Knowledgebase

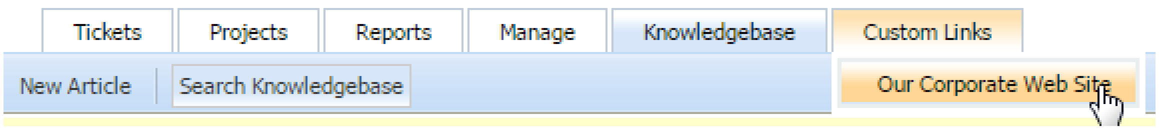
If you see the Knowledgebase tab, you have access to articles we have published in our company's Knowledgebase and may be able to create your own. Refer to "Create and Manage Knowledgebase Articles" on page 96.

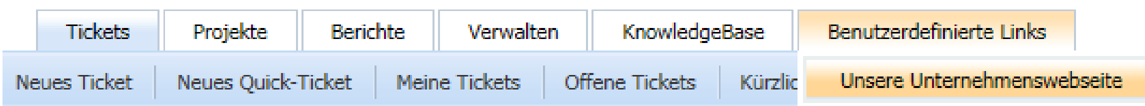




Custom Links

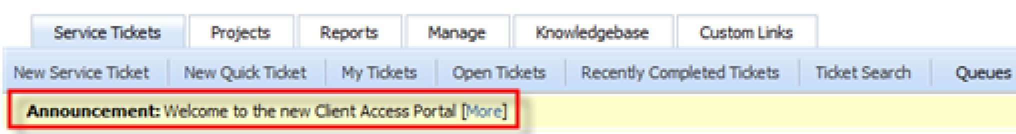
The Custom Links tab provides a drop-down menu for helpful links that we have provided:

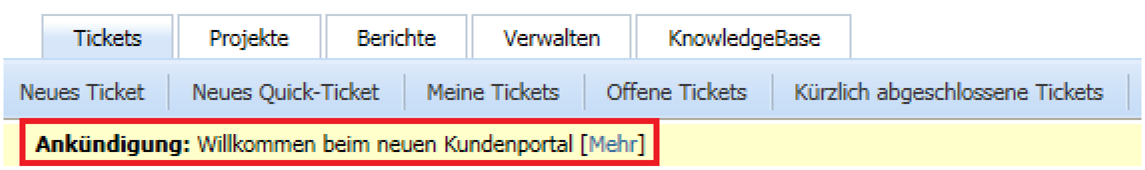




Announcement (news item)

Within the Client Portal, you will notice the Announcement headline in the bar below the tabs and sub-navigation bar. This links to information from us, such as system outage notices or other important information that we want you to know. Click the **[More]** link to view the full announcement.





If the Change Management feature is enabled and there are change requests awaiting your approval, a second banner will appear, indicating how many change requests require your approval. Click the View link to see a list.

Manage Your Client Portal

Client Portal Manager, Taskfire Resource or Taskfire Administrator to create and manage users, Taskfire Administrator for all other configuration settings

Configuration tasks for standard Client Portal Managers

If your company will not be using the Taskfire internal help desk, you will only need to make sure that the people in your company who will be accessing Client Portal have a user account with the right security level.

Refer to "Manage Client Portal Users" on page 17.

Configuration tasks for Taskfire Administrators

If you will be managing your internal help desk using Taskfire, you will need to configure the Client Portal to support the shared ticket workflow that we have agreed upon. You will also need to let us know which users will be assigned Taskfire security levels, and who will be the Taskfire Administrator who will configure the Client Portal for Taskfire.

You cannot assign Taskfire security levels yourself. You must contact us to assign them for you.

Refer to the following topics:

- "Manage Client Portal Users" on page 17
- "Manage Request Types" on page 22
- "Manage Ticket Queues" on page 26
- "Enable and Configure Quick Tickets" on page 29
- "Define Scheduled Business Hours" on page 31
- "The Out of Office Setting" on page 32
- "Add Vendors" on page 33

If you will be sharing ticket work with contacts at other locations (a parent/subsidiary set up in Autotask is required), refer to "Set Up Work Sharing Between Locations" on page 41 for an overview and recommended steps for configuration.

Manage Client Portal Users

Client Portal Managers, Taskfire Resources and Taskfire Administrators and some custom security levels

Landing Page > Manage > Users

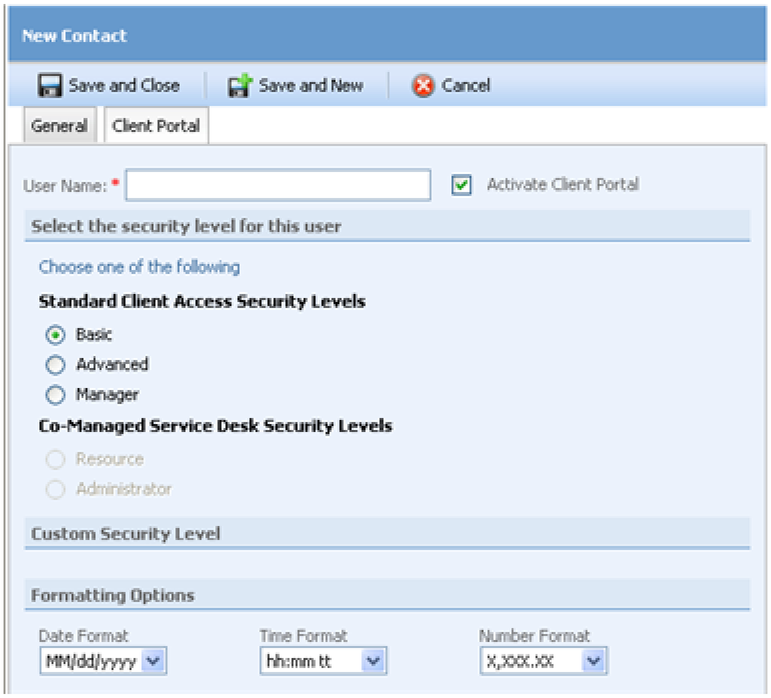
If you have access to the **Manage > Users** feature, you can create Client Portal user accounts for people at your company and manage their profile information, including user names and passwords. The users you add will appear as contacts for your company in our database.

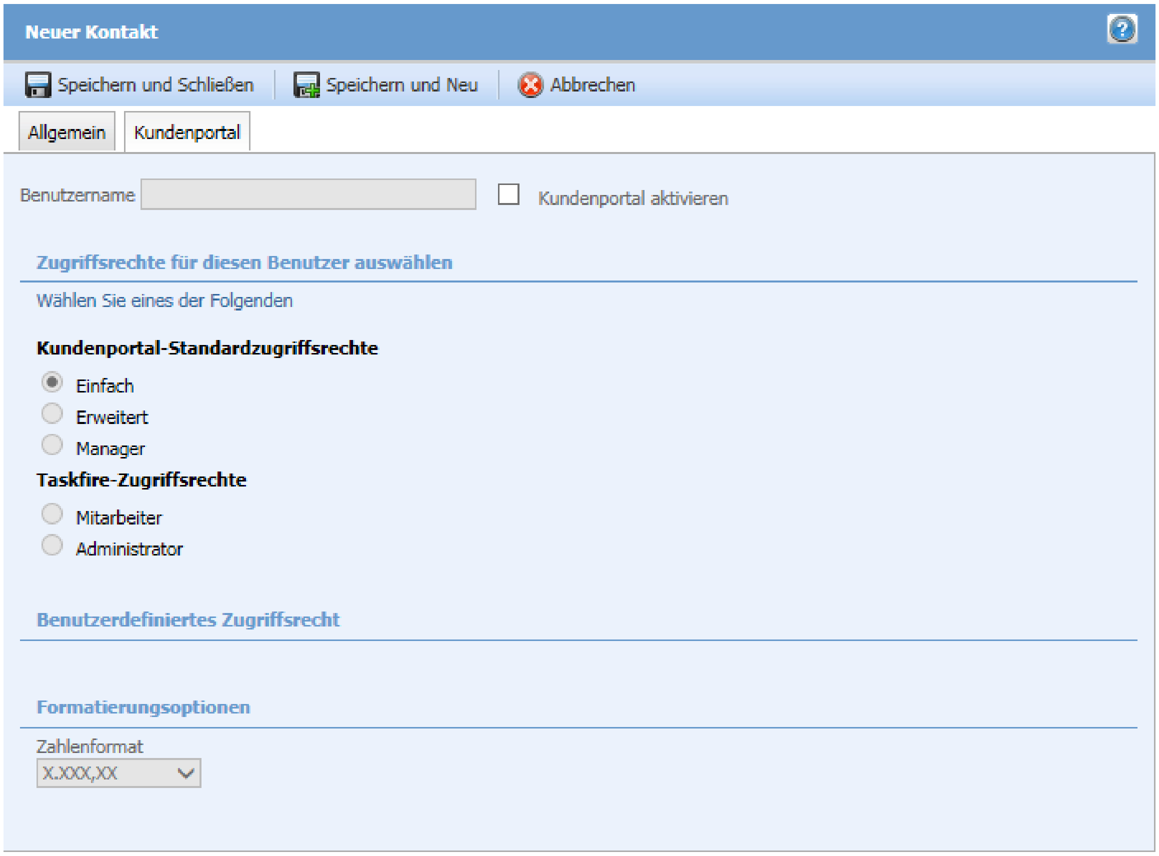
You are not able to create new Taskfire users. You can create a user record for them and assign them a standard Client Portal security level, but we will need to assign them the Taskfire security level. Also note that if you have multiple locations, a Taskfire resource that will be working on tickets for other locations must be added to the Parent Company (see "Set Up Work Sharing Between Locations" on page 41).

How to...

Add a new Client Portal user

1. On the **Manage** tab, select **Users**. The Manage Users page opens, displaying the contacts from your company.
2. Click **New User**. The New Contact page opens.
3. Enter general information for the new contact.
4. Click the **Client Portal** tab.
5. Select the **Activate Client Portal** check box. The page becomes active:


New Contact
Save and Close
Save and New
Cancel
General
Client Portal
User Name: *
Activate Client Portal
Select the security level for this user
Choose one of the following
Standard Client Access Security Levels
Basic
Advanced
Manager
Co-Managed Service Desk Security Levels
Resource
Administrator
Custom Security Level
Formatting Options
Date Format
MM/dd/yyyy
Time Format
hh:mm tt
Number Format
X,XXX.XX



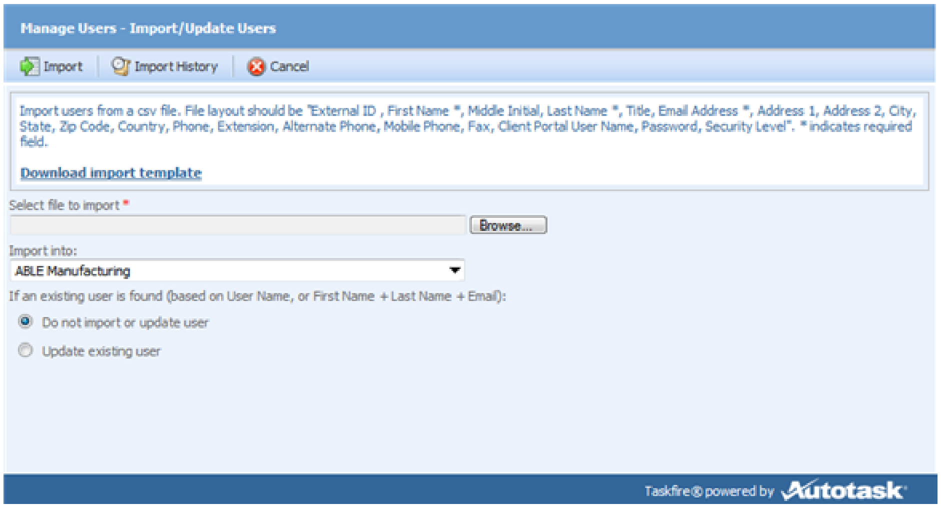
Populate the following fields:

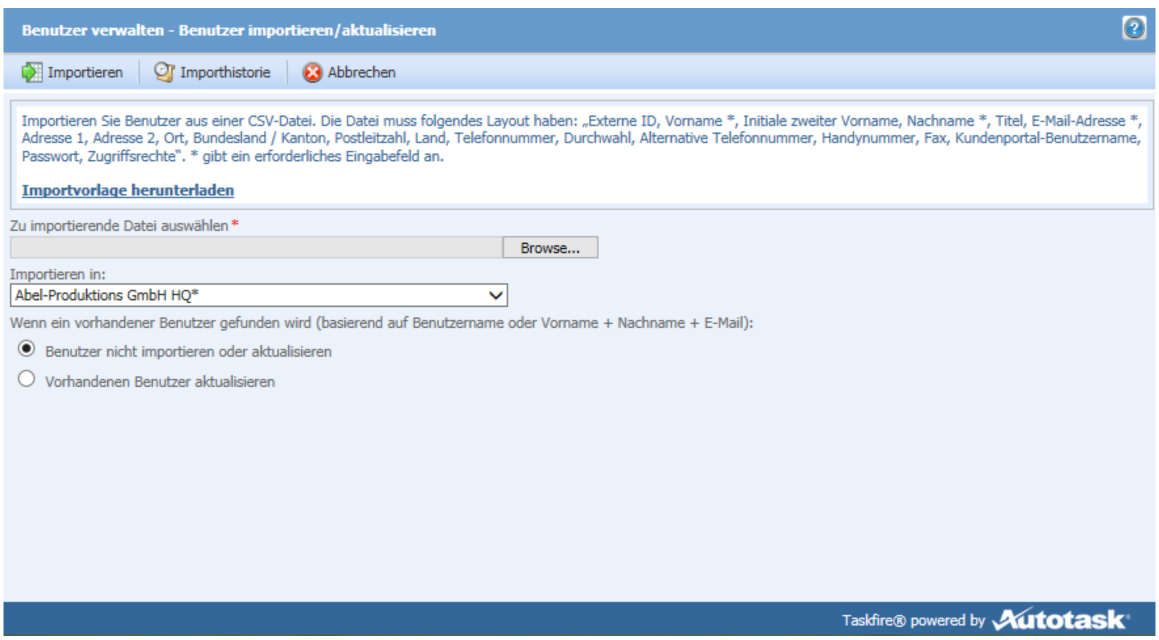
Field	Definition
User Name	Enter a user name. You may want to use email addresses as a standard for User Names.
Security Level	Select one of the Standard Client Portal Security Levels (Basic, Advanced, or Manager). To see the specific permissions for each, place your mouse over the Security Level, or refer to"Security Level Permissions " on page 7. To upgrade the user to a Taskfire security level, contact us. We can create Custom Security Levels for you that will appear in the Custom Security Level section. Contact us if you need a specific combination of permissions for your users.
Formatting Options	Select the Date, Time, and Number Format for this user.

6. Click **Save and Close.**

Import or update many users at once

1. On the **Manage** tab, select **Users**. The Manage Users page opens, displaying the contacts from your company.
2. Click **Import/Update Users** button. The Import/Update Users page opens:





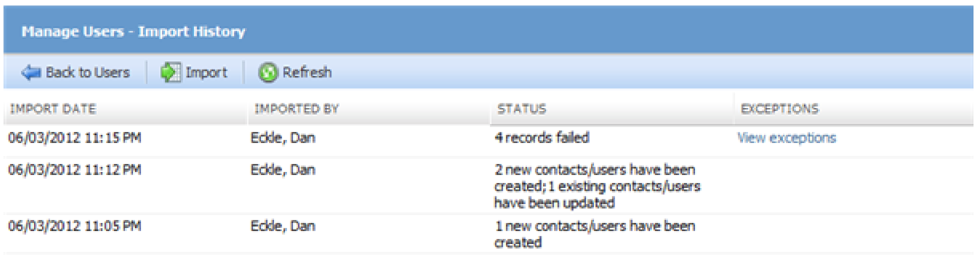
3. Click **Download Import Template**, complete it, and save it.
4. Click **Browse** or **Choose File** to locate your template.
5. If you have subsidiaries, you may select whether to upload/update users into your own company record, or a subsidiary.
6. Use the radio buttons to select your import/update preferences.

7. Click **Import**.
8. You will be notified via email when your import/update is complete.

If you wish to see your import/update history, click the Import History button, or on the link provided in the popup that appears when you have submitted your import/update file.

View the Import/Update History

1. On the **Manage** tab, select **Users**.
2. Click the **Import History** button. The Import History page displays:



IMPORT DATE	IMPORTED BY	STATUS	EXCEPTIONS
06/03/2012 11:15 PM	Eckle, Dan	4 records failed	View exceptions
06/03/2012 11:12 PM	Eckle, Dan	2 new contacts/users have been created; 1 existing contacts/users have been updated	
06/03/2012 11:05 PM	Eckle, Dan	1 new contacts/users have been created	

Any failed imports/updates will be noted in the Status column.

3. Click the **View Exceptions** link to see details on the cause of the failure.

Change a user's security level

To change a user's Security Level:

1. Click **Manage > Users**.
2. Find the user on the list of Client Portal users.
3. Click the user name to open the Contact page.
4. Select a new Standard Client Portal Security Level for the user (Basic, Advanced, or Manager) or select a Custom Security Level that we have added for your company. Refer to "Security Level Permissions " on page 7 for more information on Security Levels.

We control which standard security levels (Basic, Advanced, or Manager) you can assign when you create or edit a user in the Client Portal. Security levels that are not enabled will appear grayed out on the **Contact > Client Portal** tab.
Taskfire security levels can only be assigned by us, your service provider.

5. Click **Save and Close**.

Reset a user's password

When users forget their password, you can automatically send them a new password with one click.

1. On the **Manage** tab, select **Users**. This will open the Manage Users page.
2. Find the user whose password you need to reset. Click their name to open the Contact page.
3. Click the **Client Portal** tab.
4. Click **Reset Password/Notify User** at the bottom of the page.
5. The user's password is reset with a system-generated password, and an email with the new password is sent to them. The user can then change this password on his or her profile page.

Manage Request Types

Taskfire Administrator

Manage > Request Types

A request type is a template that you create to make it easy for users to report issues, and for you to gather all the information you need from them, using pre-configured "follow-up questions."

The request type determines:

- The internal queue the ticket will be placed into and optionally, the internal resource that will be assigned
- The vendor to whom the ticket is auto-transferred
- When the ticket is auto-transferred, and if the Out of Office setting will impact it
- Whether the ticket will be shared with IT-colleagues at your subsidiaries

We have set up a General Request type for you. You will not be able to delete this queue, but you can assign a Taskfire queue and resource, and define auto-escalation rules and Out or Office settings. If you are not going to use it, you can inactivate it.

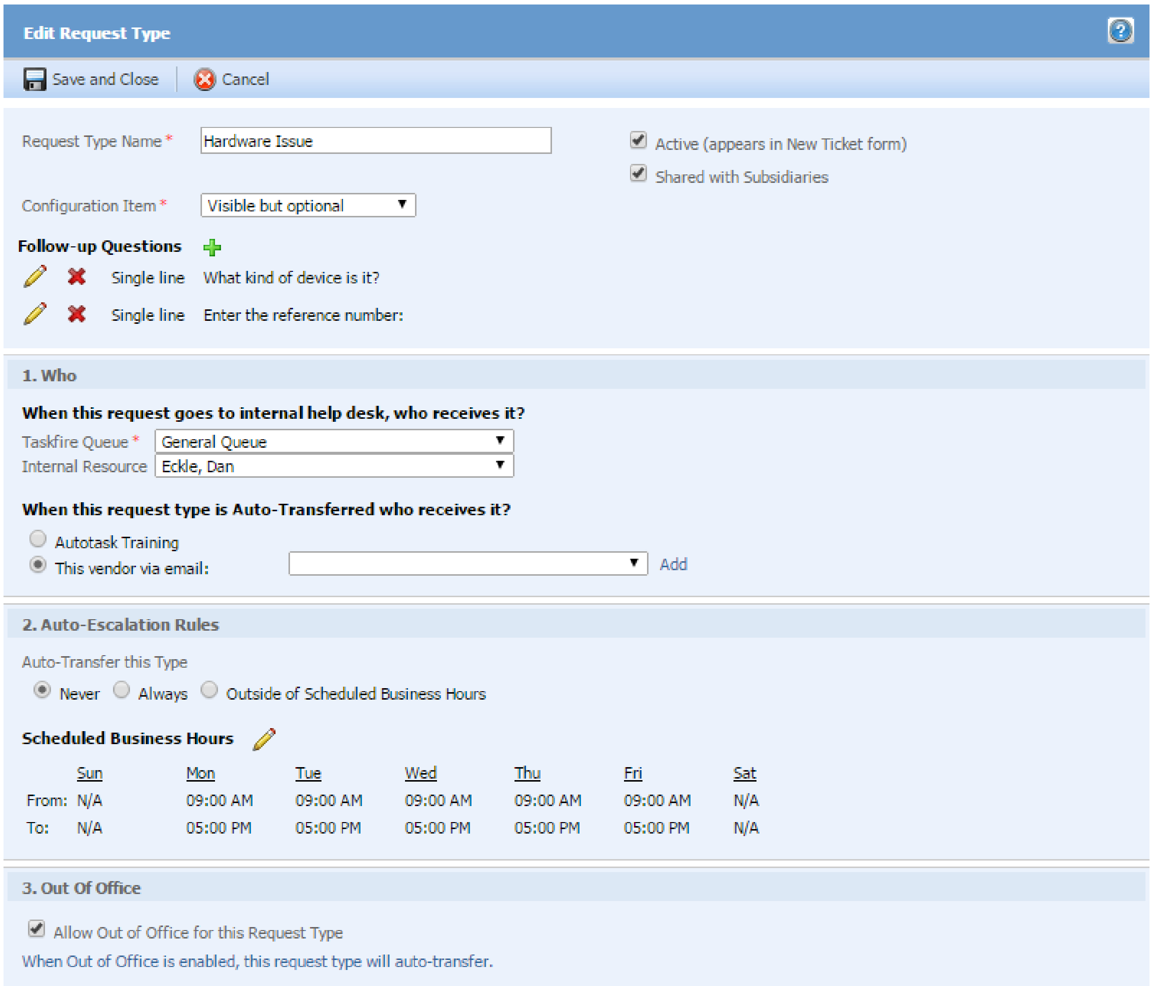
How to...

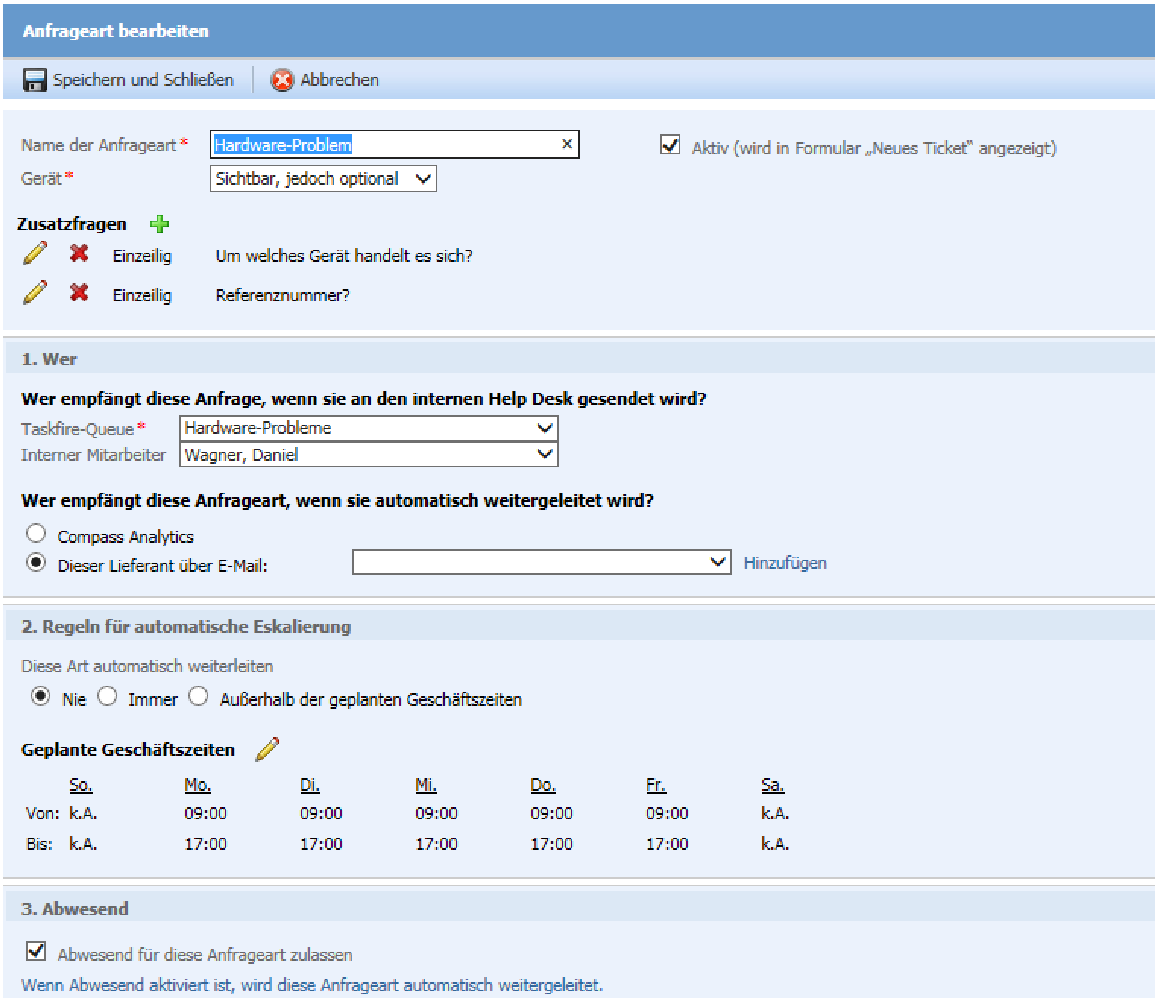
Create or edit a request type

1. Go to **Manage> Request Types**.

2. To create a new Request Type, click **New Request Type**.

   To edit an existing Request Type, click the pencil icon.





Field	Description
Request Type Name	Enter a name that makes it clear when the request type should be used.
Active	Select this check box to make the Request Type available to users.
Shared with Sub-sidiaries	Check to make this request type available to your subsidiaries. The **Shared with Subsidiaries** check box only appears if your company has multiple locations with Taskfire users and you are an administrator at the parent location. Refer to "Set Up Work Sharing Between Locations" on page 41 for more information.

Field	Description
Configuration Item	This field is read-only for request types created by your service provider, but can be edited for request types created by you. Click the dropdown to select an option: • **Not visible.** When this option is selected, the Configuration Item field is not displayed on the New/Edit Ticket page, and a configuration item is not required. • **Visible but optional.** The Configuration Item field is displayed on the New/Edit Ticket page, but not required to submit a ticket. • **Visible and required.** The Configuration Item field is displayed on the New/Edit Ticket page, and required to submit a ticket.
Follow-up Questions	Follow-up questions will appear on the New Ticket page. They prompt the user to enter all required information when they submit a ticket with this request type, and reduce the need for follow-up phone calls to get clarification. You can add up to 5 follow-up questions. • Click the **green plus sign** to add a new follow-up question. Enter the question, and select either a single-line or multi-line text box for the answer. • Click the **pencil icon** to edit or the **red X symbol** to delete an existing question.
When this request goes to internal help desk, who receives it?	Select the Taskfire queue that this type of issue should go to and the Taskfire resource who should be assigned (if any).
When this request type is Auto-Transferred who receives it?	Select the external vendor who will receive the ticket when it transfers automatically, either all the time, when your company is closed, or when Out of Office it turned on, depending on your auto-transfer settings.
Auto-Escalation Rules	Select when this type of issue should automatically transfer to us or to the selected vendor. Options include: • **Never**: Select this option if this type of issue should never automatically transfer to us or to a vendor, although you can still manually transfer the ticket if necessary. • **Always**: Select this option to always transfer this type of issue to us or a vendor. • **Outside of Scheduled Business Hours**: Select this option if you would like to automatically transfer this type of issue only when your office is closed. This setting is based on the Business Hours you entered in Manage > Business Hours. Click the pencil icon to edit your business hours. When a request type is set up to auto-escalate, the auto-escalation will use the parent business hours for the range of hours (for example, 8 AM to 5 PM), but will convert the time to the subsidiary location's time zone.

Field	Description
Out of Office	Select this check box to enable Out of Office for this type of issue. When you turn on Out of Office for the Client Portal (**Manage > Out of Office**), this type of issue will temporarily transfer to us or the selected vendor. If a parent location is set to "out of office," all tickets that use a shared request type will be temporarily transferred according to the out of office settings specified in the request type.

3. Click **Save and Close** to finish.

Delete a request type

Request types you have created yourself can be deleted, as long as they have not been used with any tickets. If they have been used, you will be able to inactivate them.

Manage Ticket Queues

Taskfire Administrator

Manage > Queues

What is a queue?

A ticket queue is a location where related tickets are stored. Each queue has resources assigned to it who are tasked with monitoring the queue and responding to the issues placed into the queue. Resources view queues on the Tickets drop-down menu and will only see the queues they are assigned to monitor.

If there is no resource on the ticket all members of the queue will receive notifications on ticket activity, unless that option is turned off on the queue detail page.

We have set up a General Queue for your use, and by default, all users with a Taskfire security level will have access to it and will receive email notifications when tickets are added to it. This queue is a system queue and cannot be deleted, but you can specify that only selected Taskfire resources have access to it.

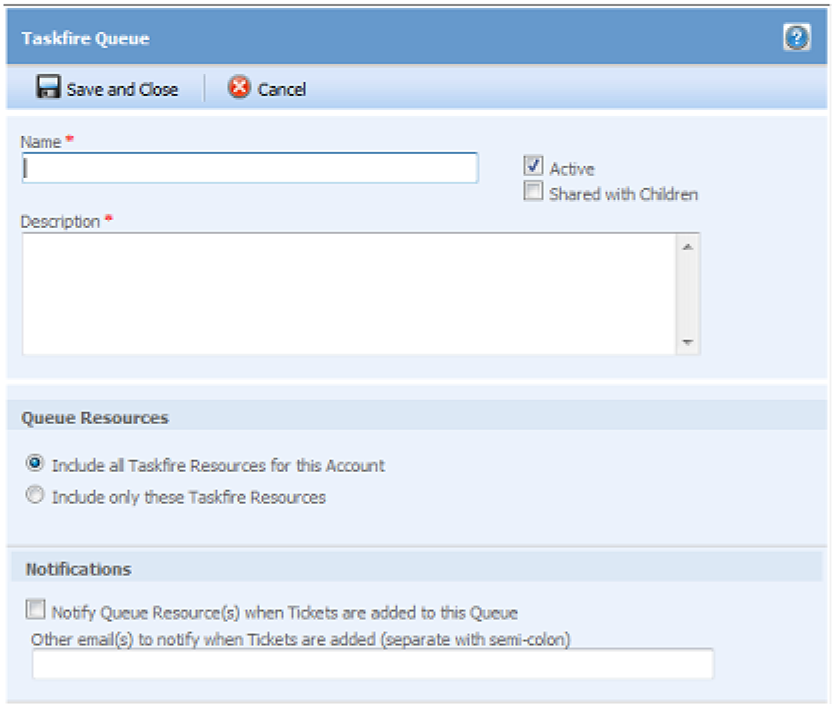
You can set up any number of additional queues.

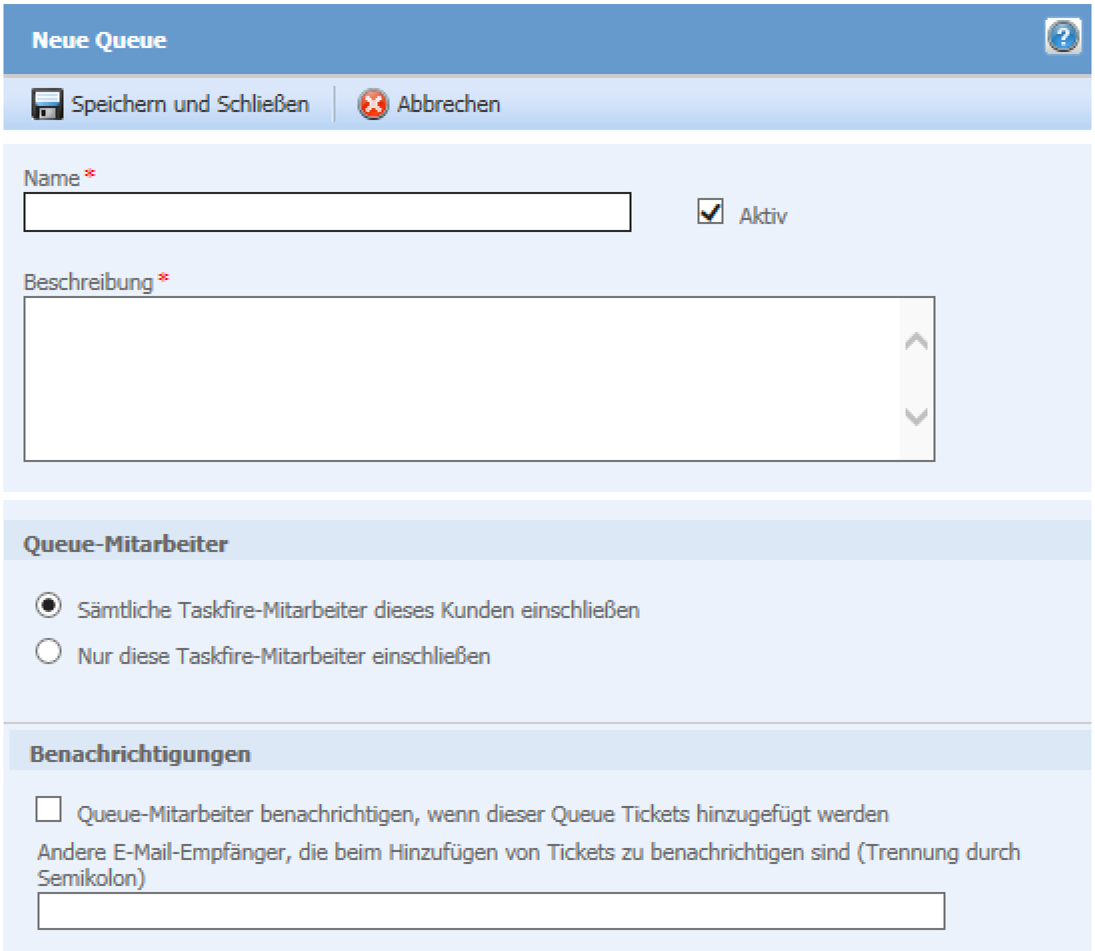
How to...

Add or edit a queue

1. On Taskfire Queues page, click **New Queue**. To edit an existing queue, click the pencil icon.

   The Taskfire Queue page opens:





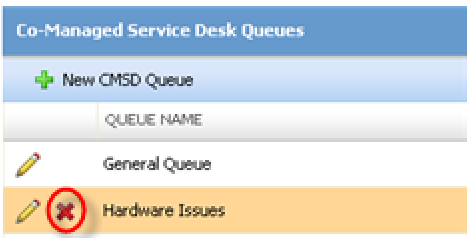
2. Populate or edit the following fields:

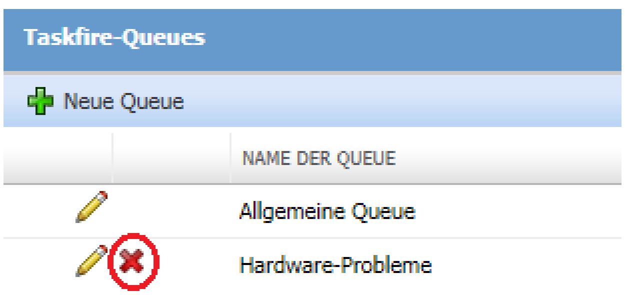
Field	Description
Name	This name is displayed when you select the queue.
Description	A description is required.
Active	If you want the Queue to be available to users right away, leave the **Active** check box selected.
Shared with Subsidiaries	The **Shared with Subsidiaries** check box only appears if your company has multiple locations with Taskfire users and you are an administrator at the parent location. Refer to "Set Up Work Sharing Between Locations" on page 41 for more information.

Field	Description
Include all Taskfire Resources for this Client / Include only these Taskfire Resources	Determines the users who are assigned to monitor the queue.
Notifications	Select the **Notify queue resource(s) when tickets are added to this queue** check box if you would like Queue resources to receive an email when tickets are added to the Queue, and enter any additional notification recipients.

Delete a queue

To delete a Queue, click the delete icon on Taskfire Queues page:





You cannot delete a queue that has ever had tickets in it. Instead, deactivate the queue by clearing the Active check box. This will keep it from appearing in the navigation and from being used for a request type from that point forward. In addition, you cannot delete a queue that is used in a request type. You must select a different queue in the request type before deleting the queue.

Enable and Configure Quick Tickets

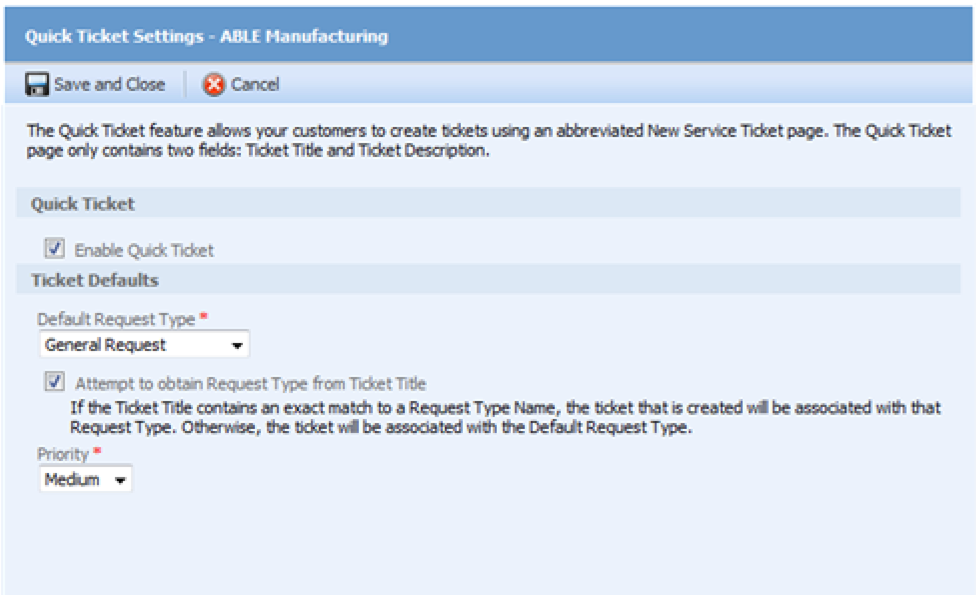
Client Portal Manager, Taskfire Administrator

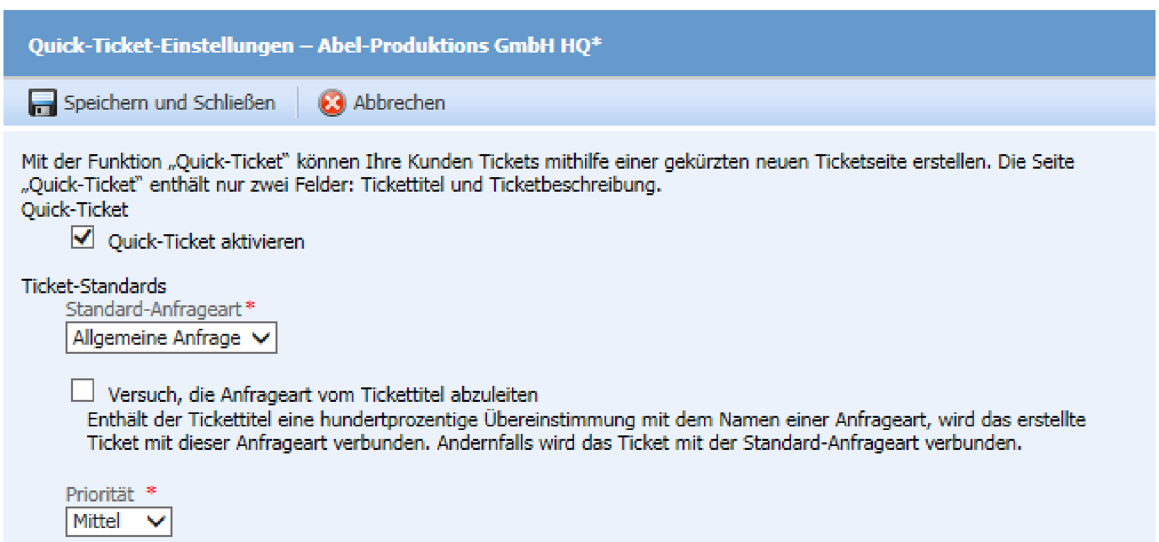
Manage > Tools & Settings > Quick Ticket

Enabling the Quick Ticket setting will allow users to create and submit tickets with only a ticket title and a description. The remaining required fields are populated from the Quick Ticket default settings.

To enable and configure Quick Tickets...

1. Go to **Manage > Tools and Settings > Quick Ticket**:





2. Select the **Enable Quick Ticket** check box (this will reveal additional fields).

Field	Description
Default Request Type	By default, all Quick Tickets will be assigned the default request type you select here.
Attempt to obtain Request Type from Ticket Title	If the Ticket Title contains an exact match to a Request Type Name, the ticket that is created will be associated with that Request Type. Otherwise, the ticket will be associated with the Default Request Type. If you select a Request Type for your Quick Tickets that requires users to select a configuration item, they will be unable to do so when creating a Quick Ticket. When the ticket is edited later, you must first select a configuration item to able to save it again.
Priority	By default, all Quick Tickets will be assigned the default priority you select here.

3. Click **Save and Close**.

Your users will be able to access it from the Landing Page and the Tickets drop-down and sub-navigation menus.

Define Scheduled Business Hours

Taskfire Administrator

Manage > Tools & Settings > Scheduled Business Hours

The Scheduled Business Hours setting lets the Client Portal know when internal resources are available and when your office is closed. They are used to determine when tickets should be automatically escalated to us or another service provider.

How to...

Add business hours

1. Navigate to **Manage > Tools & Settings > Scheduled Business Hours**.
2. In the **Scheduled Business Hours** section, enter the start and end times for your normal business day, when internal IT resources will be available.
3. In the Time Zone section, enter the time zone to use when a ticket is auto-transferred, and a request type is set to transfer "Outside of Scheduled Business Hours".
4. Click **Save and Close**.

Automatically transfer tickets outside scheduled business hours

For information on how to auto-transfer tickets to us or another vendor, refer to "Manage Request Types" on page 22.

If your company has multiple locations with Taskfire users and you share work between those locations, certain rules apply when the business hours are different for one or more location. Refer to "Set Up Work Sharing Between Locations" on page 41 for more information.

The Out of Office Setting

Taskfire Administrator

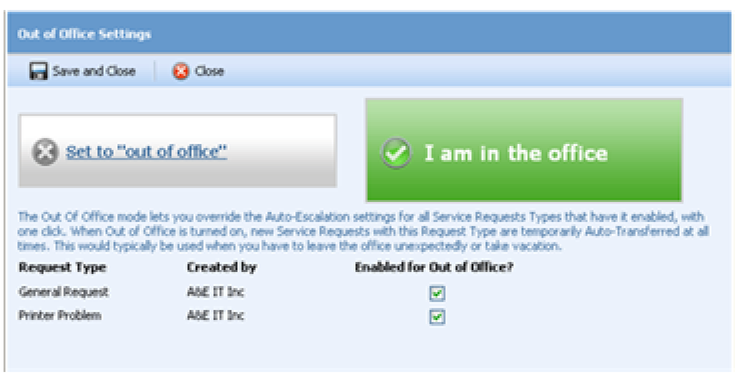
Manage > Out Of Office

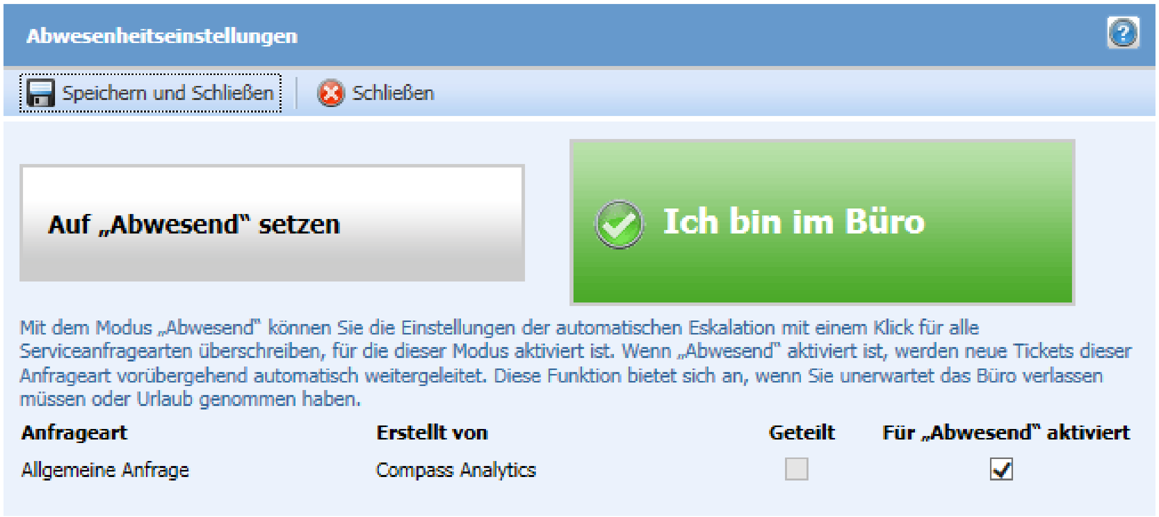
When the Out of Office setting is on, tickets with service request types that are configured for it are automatically transferred to us (or another vendor). This allows us to serve as a backup to your internal IT staff. The setting can be used whether you are out of the office for a couple of hours, or whether you are on vacation.

How to...

Turn Out of Office on or off

- To turn Out of Office on, go to **Manage > Out of Office** and click **Set to "out of office"**:





Below the buttons, you will see a list of Request Types, who they were created by (your company or ours), whether they are shared with your subsidiaries, and whether they are enabled for Out of Office.

- When you return to the office, click **I am in the office** to return to your standard Taskfire ticket workflow.

Configure request types for Out of Office

Tickets are auto-transferred to an external service provider based on their request type. Refer to "Manage Request Types" on page 22.

Add Vendors

Taskfire Administrator

Manage > Vendors

Even though we are the service provider that makes this Client Portal available to you, we are not the only vendor you can use it with. If you set up other vendors you work with on a regular basis, such as utilities, the cable company, or your landlord, you can create tickets for issues they are involved with, and use email to escalate them if necessary.

This will allow you to track all your internal help desk issues in one place.

Best Practice: Add a separate Request Type for each vendor you set up. Refer to "Manage Request Types" on page 22.

How to...

Add a vendor

1. Go to **Manage > Vendors**.
2. Enter the information for your vendor. The email address you enter will be the one that is used when you transfer a ticket to the vendor.
3. To share this vendor with your subsidiaries, check **Shared with Subsidiaries**.
4. Click **Save and Close**.

Transfer a ticket to a vendor

You can transfer a ticket manually, or you can set up auto-escalation settings to automatically transfer certain issues to the vendor. For more information, refer to:

"Transfer a Ticket to a Service Provider" on page 72

"Manage Request Types" on page 22

Manage Configuration Items (Devices, Assets)

By default, all users can add and edit configuration items, but this setting can be modified.

Manage > Configuration Items

"Configurations items" are hardware or software items (such as laptops, printers, and software applications) that we track and support for you. They also might be called "devices", "installed assets" or "installed products," depending on how your Client Portal is set up.

In this article, we will use the term "configuration item."

When you acquire a new configuration item (such as a desktop computer), you can add it through the Client Portal so that we're aware of its details. This will enable us to more effectively support you if you have problems with it. Refer to "Add and Edit Configuration Items" on page 37.

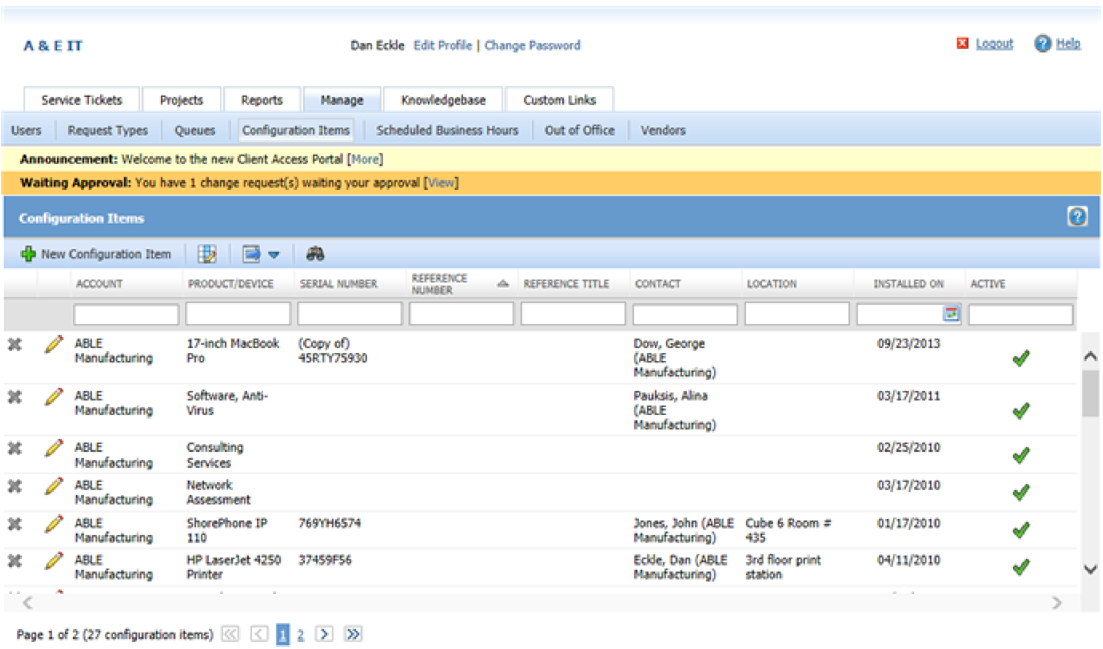
In addition, maintaining an up-to-date list of these items will help you better track your own technology assets.

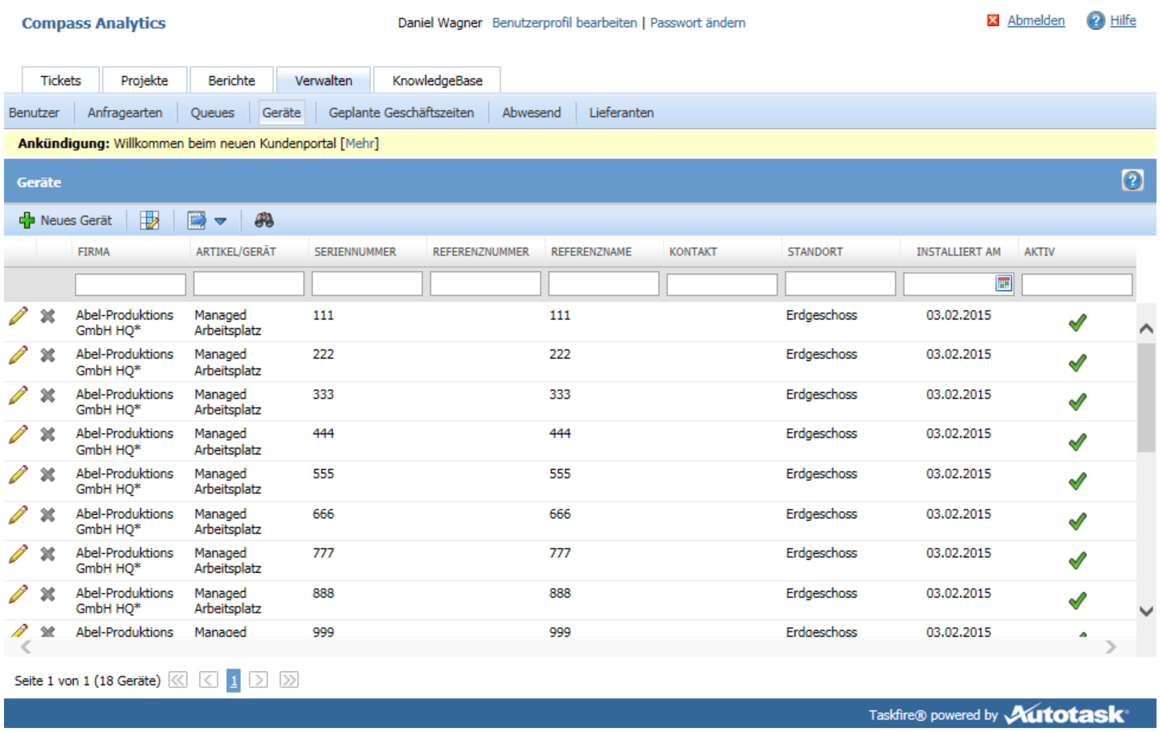
How to...

Search and sort the configuration items list

1. From the **Manage** tab menu, select **Configuration Items** or click the **Manage** tab and click **Configuration Items**.

   The Configuration Items page will display:





2. To search by any of the columns, type your criteria in the field below the column header and press **Enter**. The list will update.
3. To sort by any column in ascending order, click the column header. To sort in descending order, click the column header again.
4. For more search criteria, click **Advanced Filter**, then select your criteria and click **Apply Filter**.

Export the configuration item list

1. On the **Configuration Items** list, click **Export** and select a format.
2. Your exported file will open in a new window.

Delete configuration items

1. On the **Configuration Items** list, locate the configuration item you want to delete.
2. Click the **Delete** icon.
3. Confirm the deletion.

You will not be able to delete a Configuration Item if it is associated with one or more tickets and/or subscriptions.

Add and Edit Configuration Items

By default, all users can add and edit configuration items, but this setting can be modified

Manage > Configuration Items

Depending on how your Client Portal is set up, they may also be called "Installed Assets" or "Devices." In this article, we will use the term "Configuration Item."

How to...

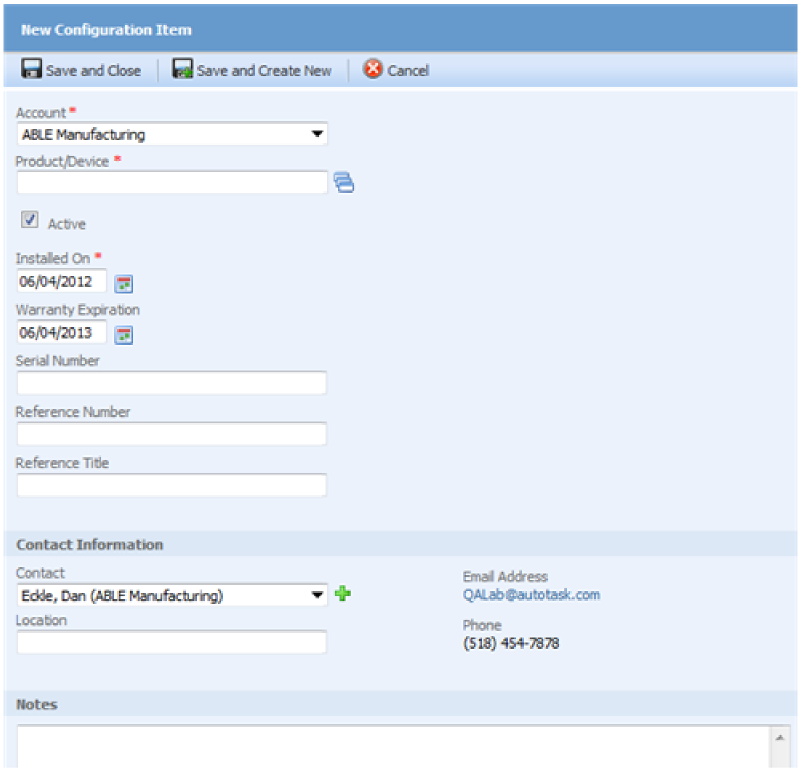
Add configuration items

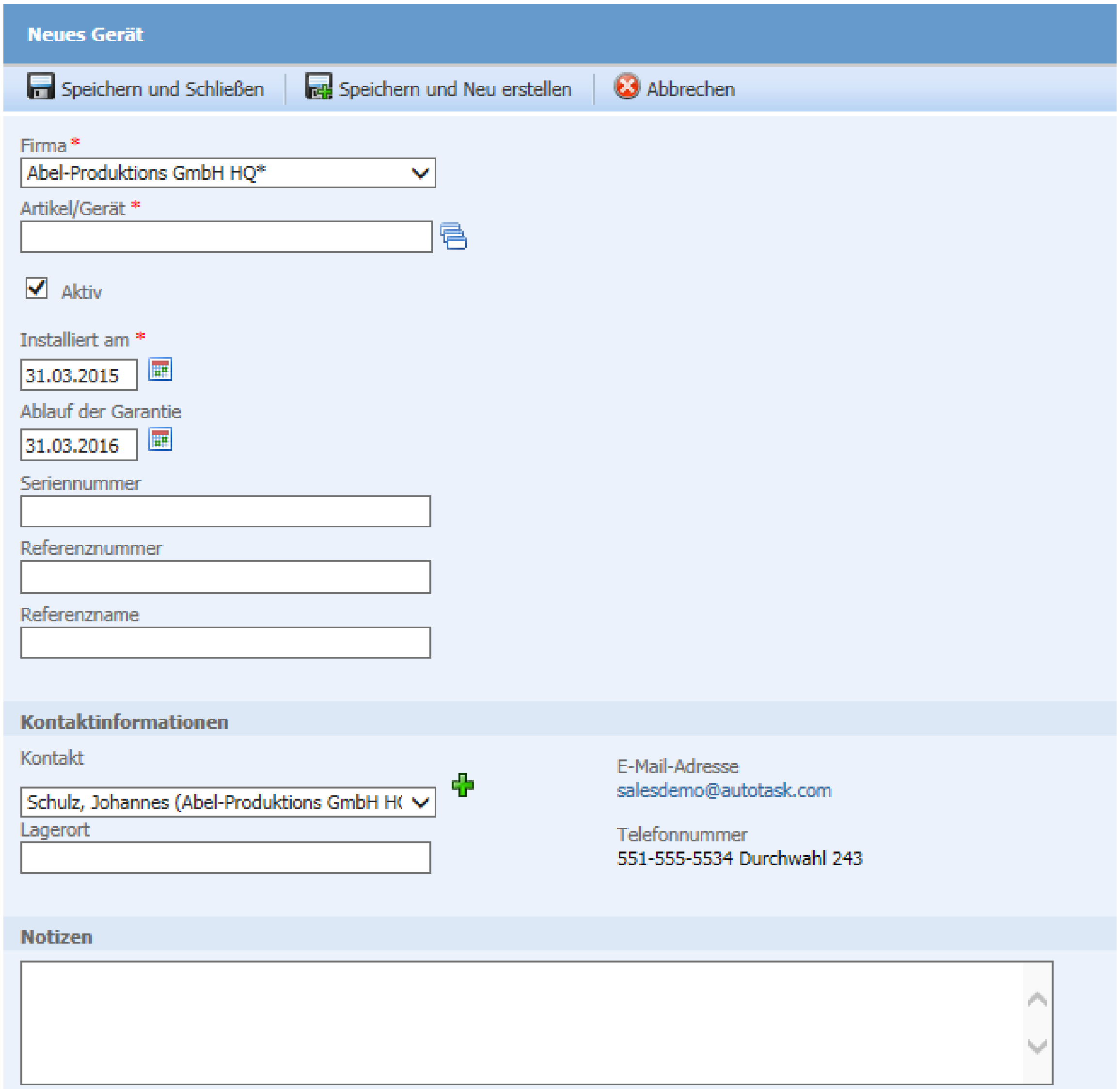
1. From the **Manage** tab menu, select **Configuration Items** or click the **Manage** tab and select **Configuration Items**.

   The Configuration Items page will display.

2. Click **New Configuration Item**.

   The New Configuration Item page will display.


New Configuration Item
Save and Close
Save and Create New
Cancel
Account *
ABLE Manufacturing
Product/Device *
Active
Installed On *
06/04/2012
Warranty Expiration
06/04/2013
Serial Number
Reference Number
Reference Title
Contact Information
Contact
Eckle, Dan (ABLE Manufacturing)
Location
Email Address
QALab@autotask.com
Phone
(518) 454-7878
Notes



3. Complete the appropriate fields.

Field	Definition
Save and Close	Saves the item and closes the page.
Save and Create New	Saves the article but keeps the page open.
Company	This field will only be displayed if you have subsidiaries. If you do, you may select the subsidiary with which the item is associated.
Product/Device	Select the product or device associated with the item.

Field	Definition
Active	Select this check box if the item is active.
Installed On	Enter the installation date or use the date selector.
Warranty Expir-ation	Enter the date on which the product warranty expires or use the date selector.
Serial Number	Enter the product serial number. This is an alpha-numeric field. Your entry does not have to be unique.
Reference Num-ber	Enter the product reference number. Your entry does not have to be unique.
Reference Name	Enter the product reference name. Your entry does not have to be unique.
Contact	The default value is the user currently logged on. You may select a different contact for this item. Depending on your security permissions, you may be able to add a new contact by click on the **+** icon.
Location	Enter the location of the item.
Notes	Enter any notes concerning the item.

4. Click **Save and Close**.

Edit configuration items

1. From the **Manage** tab menu, select **Configuration Items** or click the **Manage** tab and then click **Con-figuration Items**.

   The Configuration Items page will display.

2. Locate the item you wish to edit and click the pencil icon.

   The **Edit Configuration Item** page will display.

3. Edit any of the fields described above.
4. Click **Save and Close**.

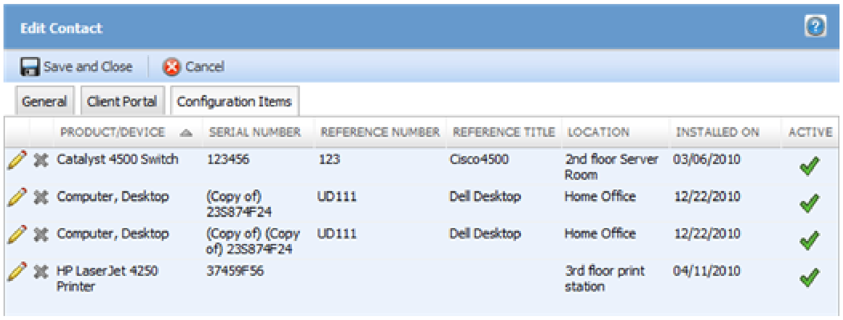
View Configuration Items Associated with a User

Security levels that have this setting enabled.

For more information on configuration items, see "Manage Configuration Items (Devices, Assets)" on page 34.

To view the configuration items (installed products, installed assets) associated with a user:

1. Click **Manage > Users**.
2. Find the user on the list of Client Portal users.
3. Click the user name to open the **Edit Contact** page.
4. Click the **Configuration Items** (or Installed Products, Devices) tab to view the configuration items associated with the user.



If you don't have permission to view configuration items for users, you will not see the Configuration Items tab.

Set Up Work Sharing Between Locations

Taskfire Administrator

Taskfire includes full support for sharing work between locations.

If your company has multiple locations and you would like to share work with your colleagues in other locations, let us know. We will set up one of your locations (usually your headquarters) as the "parent" location, and all other locations as "subsidiaries". This will allow ticket sharing between locations in the Client Portal.

There are two ways to set this up:

- Subsidiary tickets are shared with the parent location only. Resources at the parent location are able to see and work on parent and subsidiary tickets, resources at the subsidiary locations are able to see and work on tickets for the subsidiary only. See "Share subsidiary tickets with the parent location" on page 42.

- You can also allow resources at subsidiary locations to see and work on parent and "sibling" (other subsidiary location) tickets. See "Share all parent and "sibling" location tickets" on page 43.

How to...

Share subsidiary tickets with the parent location

This kind of sharing must be set up by the Taskfire Administrator at the parent location. The Taskfire Administrator sets up all shared request types, queues and vendors.

Set up resources

Resources associated with the parent location will be able to see and work on tickets from any location, resources associated with a subsidiary location will only see and work on tickets for that location.

- Regardless of their physical location, add resources who need to work on tickets from more than one location to the parent location.

Share request types, queues and vendors

1. Go to **Manage > Request Types (Queues, Vendors)** and open the request type (queue, vendor) you wish to share.
2. Select the **Shared with Subsidiaries** check box.

After you select this check box and save, the shared request type (queue, vendor) will appear on the request type drop-down list when a user at any location is creating a new ticket, and also appear on the **Manage > Request Type Preferences** page with a check mark in the **Shared** column to indicate its shared status.

About request types created by the solution provider

Any service request templates we (the solution provider) have created will appear in Taskfire for the parent and all subsidiary locations. The template will even have the same name. Some changes can be made by locations, such as assigning a resource and adding auto-escalation rules.

As long at the template remains unshared the changes remain internal to that location. If, however, the parent shares the service request template at any point, all subsidiary location-specific changes are lost and the parent-shared version replaces the subsidiary version. Conversely, if the template is unshared, all subsidiary location-specific changes are reinstated.

Shared queues will appear on the Tickets menu for all parent and subsidiary resources that have been added to the queue (Taskfire resources at the subsidiary will only see their location's tickets and not those of other locations or of the parent), and send notifications to resources when a ticket for their location has been added to the queue.

Vendors will be available for selection when a resource at a subsidiary or parent location transfers a ticket.

The only time you will want an unshared request type (queue, vendor) would be if the location will handle specialized work internally that will never go outside that location.

Share all parent and "sibling" location tickets

This type of sharing allows subsidiary resources to see and work on parent and sibling location tickets.

It must be enabled by us, your service provider. It is not necessary to share request types, queues, or vendors, but you must indicate if tickets are to be displayed for Taskfire security levels only, or both standard Client Portal and Taskfire security levels.

Sever a parent/subsidiary relationship

If at some point the parent/subsidiary relationship in Autotask is severed, all sharing settings at subsidiary locations are removed. If at any time the relationship is reinstated, all sharing settings will also be reinstated.

Work with Tickets in Client Portal

All Client Portal users can create tickets and view tickets they are the ticket contact or the assigned client contact for. Other permissions depend on the security level.

Tickets > My Tickets

When you have an issue to report to us, you can submit a ticket through the Client Portal. The ticket will go directly into one of our IT management queues, where it will be immediately prioritized and assigned.

What is a ticket?

A ticket is the electronic record of an issue you want us to deal with. You create one to report bugs, request technical support, or submit feature suggestions.

Most tickets will be regular service requests (reset password, upgrade Windows...), but we may also categorize a ticket as an incident ticket (something's not working...), problem ticket or change request ticket. This designation will appear on the upper right corner of the ticket page. Refer to "About Change Requests, Incidents and Problems" on page 50.

The ticket initially includes only the information you enter - a title, a description of the issue, the priority, answers to any follow-up questions, and your contact information. After we receive the ticket, assign it, and begin to work on it, the ticket will include additional information, such as the resource assigned, hours worked, and notes that have been added. How much of this you can see will depend on our global ticket settings and your security level. But you will be able to track what is happening, add attachments, and enter notes of your own.

What you can do with tickets...

If you are a user with a standard Client Portal security level

Depending on your security level, you can:

- Submit tickets directly into our ticketing system. Refer to "Create a Ticket" on page 45.
- Search for existing tickets. Refer to "Find a Ticket Using Ticket Grids" on page 54.
- Monitor the progress of previously submitted tickets and review our staff's notes and time entries. "View a Ticket" on page 56

- Add notes and attachments of your own. Refer to "Add a Ticket Note" on page 61 and "Add Attachments" on page 63.
- Grant approvals for proposed work online. Refer to "About Change Requests, Incidents and Problems" on page 50.
- If you are a company we bill for work done for another company (the "End Client"), you can review the work we did for the end client. You can find more on that in the topic "Monitor End Client Tickets and Projects" on page 101.

If you are a user with a Taskfire security level

Users with a Taskfire license can run their own internal help desk in the Client Portal. In addition to the features available to standard security levels, they can:

Edit tickets once they are created. Refer to "Edit a Ticket" on page 65.

Work on internal tickets themselves. Refer to "Track Internal Time on a Ticket" on page 69.

Escalate tickets that go beyond the capacity of the internal help desk to us or another service provider. Refer to "Transfer a Ticket to a Service Provider" on page 72.

Create a Ticket

All users

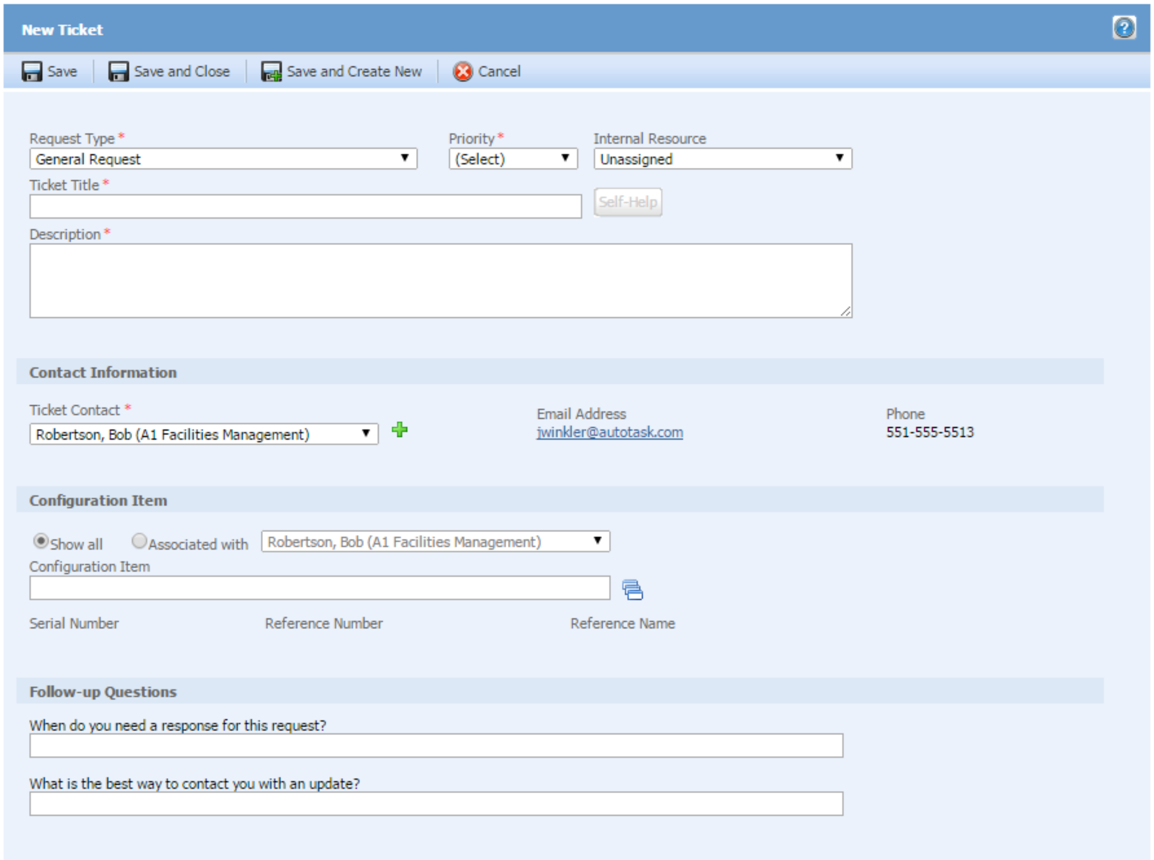
Tickets > New Ticket

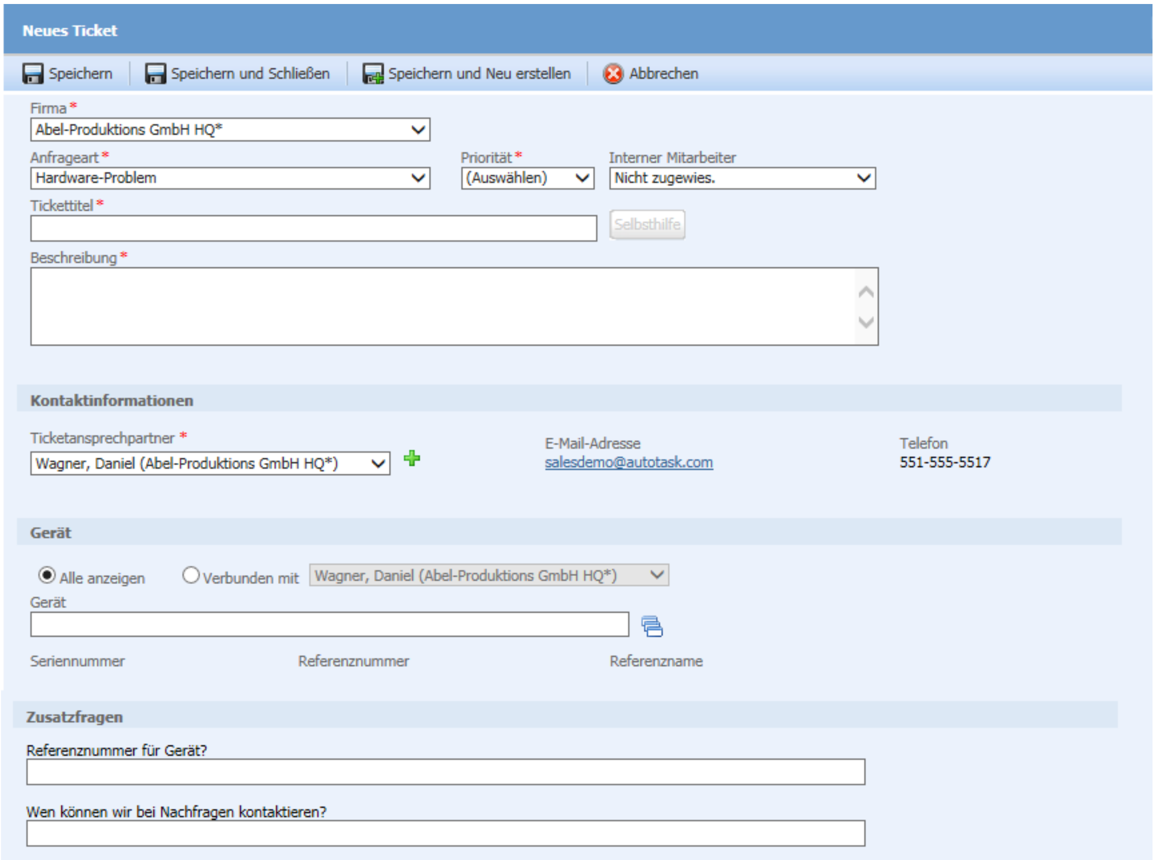
For a detailed description of tickets, see "Work with Tickets in Client Portal" on page 44.

How to...

Create a standard ticket

1. Click the **Create a Ticket** button on the Landing Page, or click the Tickets tab and select **New Ticket**.


New Ticket
Save
Save and Close
Save and Create New
Cancel
Request Type *
General Request
Priority *
(Select)
Internal Resource
Unassigned
Ticket Title *
Self-Help
Description *
Contact Information
Ticket Contact *
Robertson, Bob (A1 Facilities Management)
Email Address
jwinkler@autotask.com
Phone
551-555-5513
Configuration Item
Show all
Associated with
Robertson, Bob (A1 Facilities Management)
Configuration Item
Serial Number
Reference Number
Reference Name
Follow-up Questions
When do you need a response for this request?
What is the best way to contact you with an update?



2. Complete the following fields:

Field	Description
Account	Defaults to the location of the logged-in user. If you have set up work sharing between locations, you can select a different location.
Request Type	Select a the most appropriate request type. When you make your selection, the page may refresh and request type-specific follow-up questions may be displayed. Please enter as much information as possible. This will help us assign the right technicians to you service request and will speed up the resolution. Picking the right request type is crucial. Request types determine if the ticket is sent to us, your service provider, or, if you have licensed the Taskfire internal help desk, is assigned to an internal queue.

Priority	If you see the Priority field, select a priority for the issue. Options include Critical, High, Medium, and Low. You will only see this field if your Client Portal Security Level allows you to set the Ticket Priority. Otherwise, the Priority is determined by settings in Autotask. Taskfire users will always see the Priority field because it represents the Taskfire Priority, not the ticket priority.
Internal Resource	Select an internal resource if this ticket will be worked on by internal staff. The internal ticket resource is the person at your company who is assigned to work on the ticket. The internal resource automatically receives all notifications associated with the ticket, including status changes, and any updates we make on transferred tickets, including notes and actions. The ticket will appear on their My Tickets page in Client Portal.
Ticket Title	Type a title for your ticket. Make this title as clear as possible to communicate your issue.
Description	Type a description of the issue. Include as much detail as you can, including what the problem is, how to replicate the issue (if applicable), and any other important details.
Self-Help	*Appears only if Knowledgebase is enabled for your company*. Click the **Self-Help** button to access articles in the Knowledgebase that relate to the ticket you are creating and which might help you solve your issue. See "Use the Knowledgebase" on page 94 for more information.
Contact Information	
Ticket Contact	Defaults to your name, but you can select a different contact. This is the person that we will contact if we need additional information. The contact's email address and phone number will be displayed, but cannot be edited.
Configuration Item (may not be displayed for all Request Types)	
Show All/ Associated With	Select the **Show All** radio button to select from all configuration items installed for your company. Select **Associated with** to filter the configuration item list by items associated with the ticket contact.
Configuration Item	Select the configuration item this ticket is related to by clicking the configuration item selector icon, or typing the name of the configuration item into the field. The configuration item list only contains products we have added for your company. Configuration items on the drop-down list appear in the following format: [Configuration Item Name] [Serial Number] | [Reference Number] | [Reference Name]. For certain request types, selecting a configuration item may be required.
Follow-up Questions	
Follow-up Questions	Answer any follow-up questions that appear. Not all request types will have questions. These are used to help us gather important information from you up front, so we can begin working on the issue as quickly as possible.

Additional Information	
Additional Inform-ation	Any ticket user-defined Fields (UDFs) that have been added and set to display in the Client Portal will appear in this section.

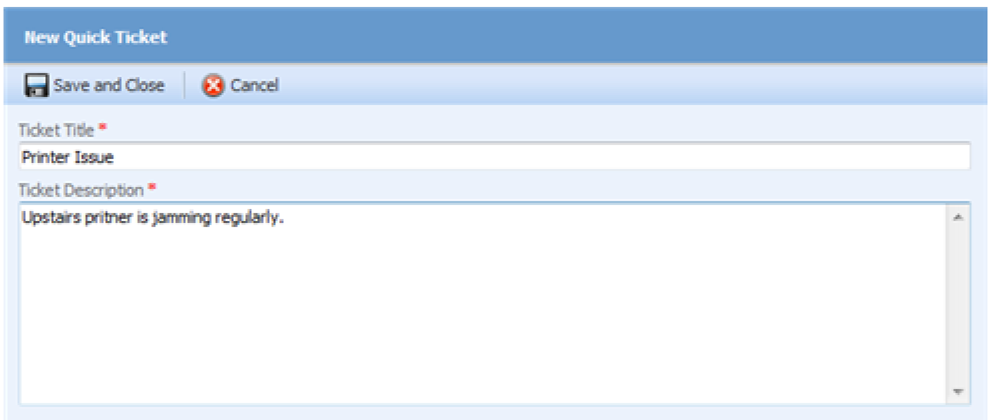
3. Click **Save** when you are finished.

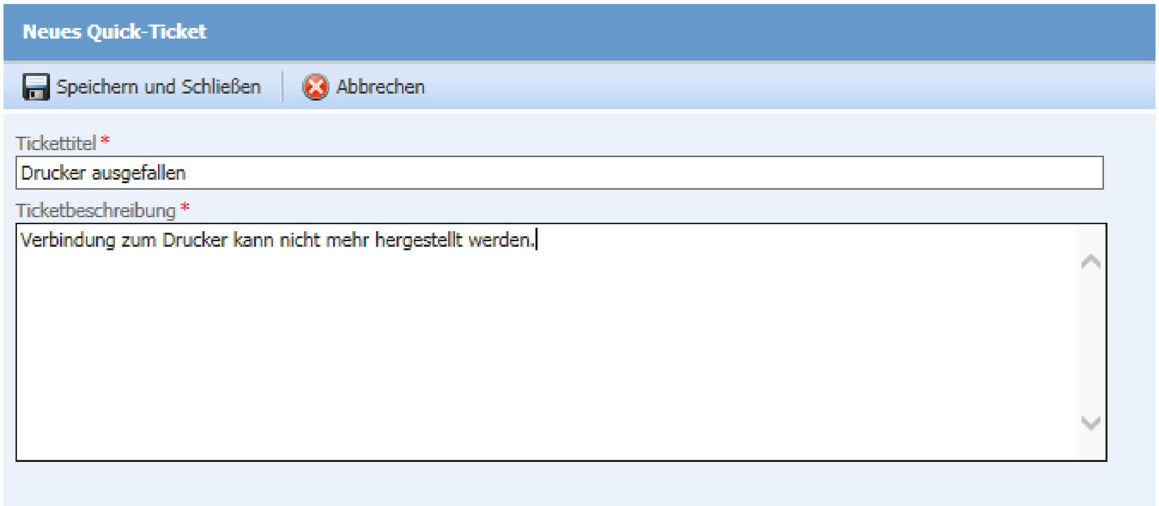
The ticket is now submitted. You can check the status of your ticket any time through the portal, using the My Tickets, Open Tickets, or Find Tickets search options. Refer to "Find a Ticket Using Ticket Grids" on page 54 for more information.

Create a Quick Ticket

The Request Type and Priority default to the settings configured by your Manager. If you want to control the content of these fields, use the standard ticket page described above.

1. Click the **Create Quick Ticket** button on the Landing Page, or click the Tickets tab and select **New Quick Ticket**.





2. Complete the following fields:

Field	Description
Title	Type a title for your ticket. Make this title as clear as possible to communicate your issue.
Description	Type a description of the issue. Include as much detail as you can, including what the problem is, how to replicate the issue (if applicable), and any other important details.

3. Click **Save and Close**.

About Change Requests, Incidents and Problems

In Autotask, the parent application to your Client Portal (and the one we use to manage our business), there are several types of tickets we can create.

- The first is an ordinary **Service Request**. A ticket that asks us to upgrade your SnagIT license to version 12 would be a Service Request.
- The second is called an **Incident**, a type of ticket where something is not working as expected. It could be a standalone issue, like when a printer is not working. When the printer is fixed, the issue is resolved and your service request is completed.
- Sometimes, however, an issue is part of a larger unknown problem. And sometimes a group of tickets all have the same root cause. These issues are **Incidents**, and the cause of these incidents is the **Problem**.

More about incidents and problems

Our goal is to restore normal IT service operations as quickly as possible to minimize the adverse impact on your business operations. Associating incidents with a problem can help us do that by allowing us to track, manage, and resolve all related incidents together instead of handling each one separately.

If one of your tickets is associated with either problem tickets or incident tickets, you'll see corresponding sections on the Ticket Detail view. These sections will list any problems or incidents associated with the base ticket. Just click the problem or incident ticket number to open the associated ticket.

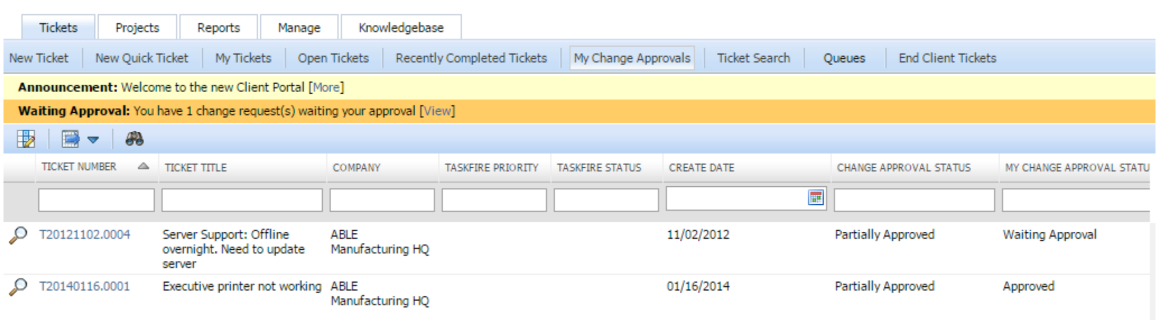
- The last type of ticket is a **Change Request**.

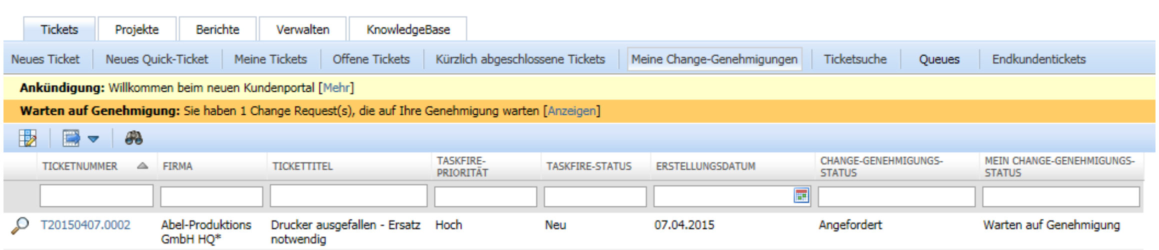
More about change request tickets

The objective of change management is to control and enable beneficial changes with minimum disruption to your business. In order to support that objective, formal approvals by one or several people are required. We may even assign change approvals to you, so you can approve or reject a change that will impact your business operations.

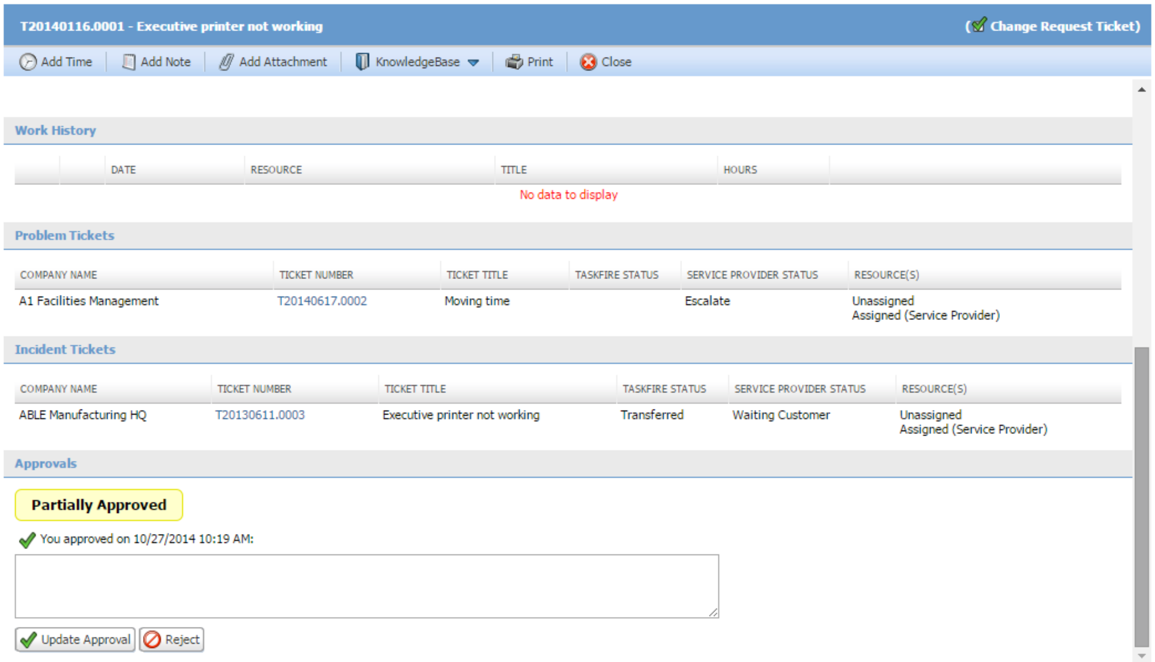
There are several differences between regular tickets and Change Request tickets:

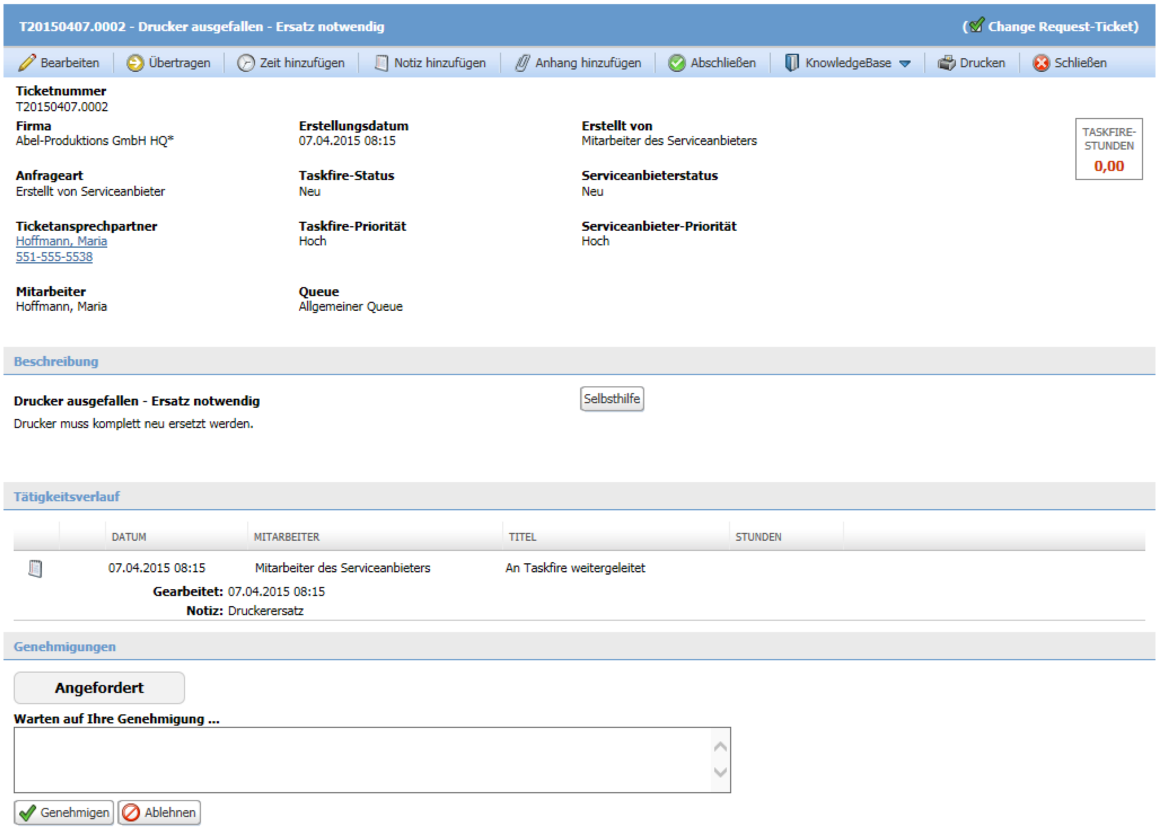
- Change Request tickets have their own grid under the **Tickets > My Change Approvals**, where all tickets that you have approved or need to approve are listed. A flag will let you know if there are change requests waiting your approval.





- On the ticket title bar, the ticket is identified as a Change Request Ticket


T20140116.0001 - Executive printer not working
(Change Request Ticket)
Add Time
Add Note
Add Attachment
KnowledgeBase
Print
Close
Work History
DATE
RESOURCE
TITLE
HOURS
No data to display
Problem Tickets
COMPANY NAME
TICKET NUMBER
TICKET TITLE
TASKFIRE STATUS
SERVICE PROVIDER STATUS
RESOURCE(S)
A1 Facilities Management
T20140617.0002
Moving time
Escalate
Unassigned
Assigned (Service Provider)
Incident Tickets
COMPANY NAME
TICKET NUMBER
TICKET TITLE
TASKFIRE STATUS
SERVICE PROVIDER STATUS
RESOURCE(S)
ABLE Manufacturing HQ
T20130611.0003
Executive printer not working
Transferred
Waiting Customer
Unassigned
Assigned (Service Provider)
Approvals
Partially Approved
You approved on 10/27/2014 10:19 AM:
Update Approval
Reject



- At the bottom of the ticket, you'll see an **Approvals** section, where you can approve or reject the change, or update your approval
- If you've opened a change request ticket that requires your approval, you'll also see an alert at the top of the ticket.

How to...

Approve or reject a change request

1. Click the **View** link in the **Waiting Approval** banner on the landing page or navigate to **Tickets > My Change Approvals**.
2. Click the ticket number to open the ticket.
3. Scroll to the **Change Information** section and review the proposed change(s).
4. Scroll to the **Approvals** section.
5. Optionally, enter the reason for your approval or rejection.
6. Click **Approve** or **Reject**.

Update your approval or rejection

You can change your mind about a previous approval or rejection.

1. Open the ticket and scroll to the **Approvals** section.
2. Enter the reason for changing your approval or rejection.
3. Click the **Update Approval** or **Update Rejection** button.

Find a Ticket Using Ticket Grids

All users can see the tickets they submitted, and Taskfire users can see the queues they are a member of. Permission to see all tickets is governed by your security level.

Tickets Menu

When you click on the Tickets tab, a menu of options lets you choose from several grids that filter your company's tickets in different ways. The options you will see will depend on your security level.

Menu Option	Description	Standard Client Portal Security Levels			Standard Taskfire Security Levels	
		Basic	Advanced	Manager	Resource	Administrator
My Tickets	Tickets where the user is the Ticket Contact	Yes	Yes	Yes	Yes	Yes
Open Tickets	Incomplete tickets, including recurring tickets due within 30 days and tickets at subsidiary locations.	No	All	All	All	All
Recently Completed Tickets	Tickets completed within the last 7 days.	Mine	All	All	All	All
My Change Approvals	Tickets that require your approval. Refer to "About Change Requests, Incidents and Problems" on page 50	Mine	All	All	All	All
Ticket Search	All tickets regardless of status.	Mine	All	All	All	All
Queues	All tickets assigned to the queue. Refer to "Manage Ticket Queues" on page 26.	No	No	No	Queues they are assigned to	All
End Client Tickets	Tickets for which your company is the Company to bill. See "Monitor End Client Tickets and Projects" on page 101.	No	Yes	Yes	Yes	Yes

The grids in which tickets are displayed are very flexible. You can add, remove, reorder, sort, and filter on columns. The Advanced Filter provides detailed search criteria for locating specific tickets.

Whether or not you can display the Service Provider Priority column depends on your Client Portal security level settings.

How to...

Add, remove and reorder columns

1. Click the **Column Chooser** icon. A window that displays available and selected columns will open.

   To add an available column, select it and click the right arrow. It will be added to the **Selected** list.

   To remove a column, select it and click the left arrow. It will be added to the **Available** list.

   To reorder the columns, highlight a selected column and click the up or down arrow.

2. Click **Save and Close**.

   Outside of the column chooser, you can also click on a column header and drag the column to a new location.

   The Priority column (for Taskfire users, Service Provider Priority) is only available to users with security level permission to view Priority.

Export the columns displayed in the grid

1. Place your mouse over the **Export** icon at the top of the list and select the type of export you'd like (CSV, Excel, or PDF).

   If you plan to print the report, select the .PDF format.

2. The ticket report opens in a new window.

Sort on a column header

1. Click a column header to sort it in ascending order.
2. Click again to sort in descending order.

Filter on column headers

- Enter your filter criteria directly in the field below the column header. The filter will be applied shortly after you stop typing.

You can search by multiple columns at once. For example, once you search by company name Acme, you can then search the Acme company tickets by another filter.

Use advanced filtering

1. Click the **Advanced Filter** icon on any ticket grid.
2. For each column you wish to filter on, select a filter type (if necessary), an operator, and the values.
3. Click **Apply Filter**. This will return you to the ticket grid, with your new filter applied.
4. To modify the filter, click the **Edit** link at the top of the grid.
5. To clear the filter, click the **Clear** link.

Open a ticket

Click on the magnifying glass icon to open a ticket in a new window.

View a Ticket

All users can at least open tickets they are the ticket contact for

On any ticket grid, click the magnifying glass on a ticket row

All Client Portal users can view tickets they are the ticket contact for. The ticket page they see, however, depends on the security level assigned to them.

The ticket view for users with standard Client Portal security levels

Users with a standard Client Portal security license see a ticket view that reflects the fact that they can follow the ticket in the Client Portal, add a note or an attachment, consult the Knowledgebase if it is enabled, and print the ticket. All ticket fields are read-only.

Your Security Level permissions determine whether or not you will see the ticket Priority field. By default, users with a standard Client Portal security license do not see the field. That permission can be changed with a custom security level.

If you are a Client Portal user without access to Taskfire, and co-workers are Taskfire users, those co-workers will see a Taskfire Priority that does not display for non-Taskfire users.

T20150219.0004 - Computer doesn't boot

Add Note | Add Attachment | KnowledgeBase | Print | Close

Ticket Number
T20150219.0004

Account
ABLE Manufacturing HQ

Create Date
02/19/2015 02:42 PM

Created By
Eckle, Dan

Request Type
Hardware Issue

Taskfire Status
New

Service Provider Status

Ticket Contact
Eckle, Dan
551-555-5517-23

Resource(s)

Description

Computer doesn't boot

Self-Help

I have tried unplugging.

Follow On Questions

Q: What kind of device? A: PC
Q: xasadsa A: no answer

Configuration Item
Managed Workstation

Serial Number
8907246910416

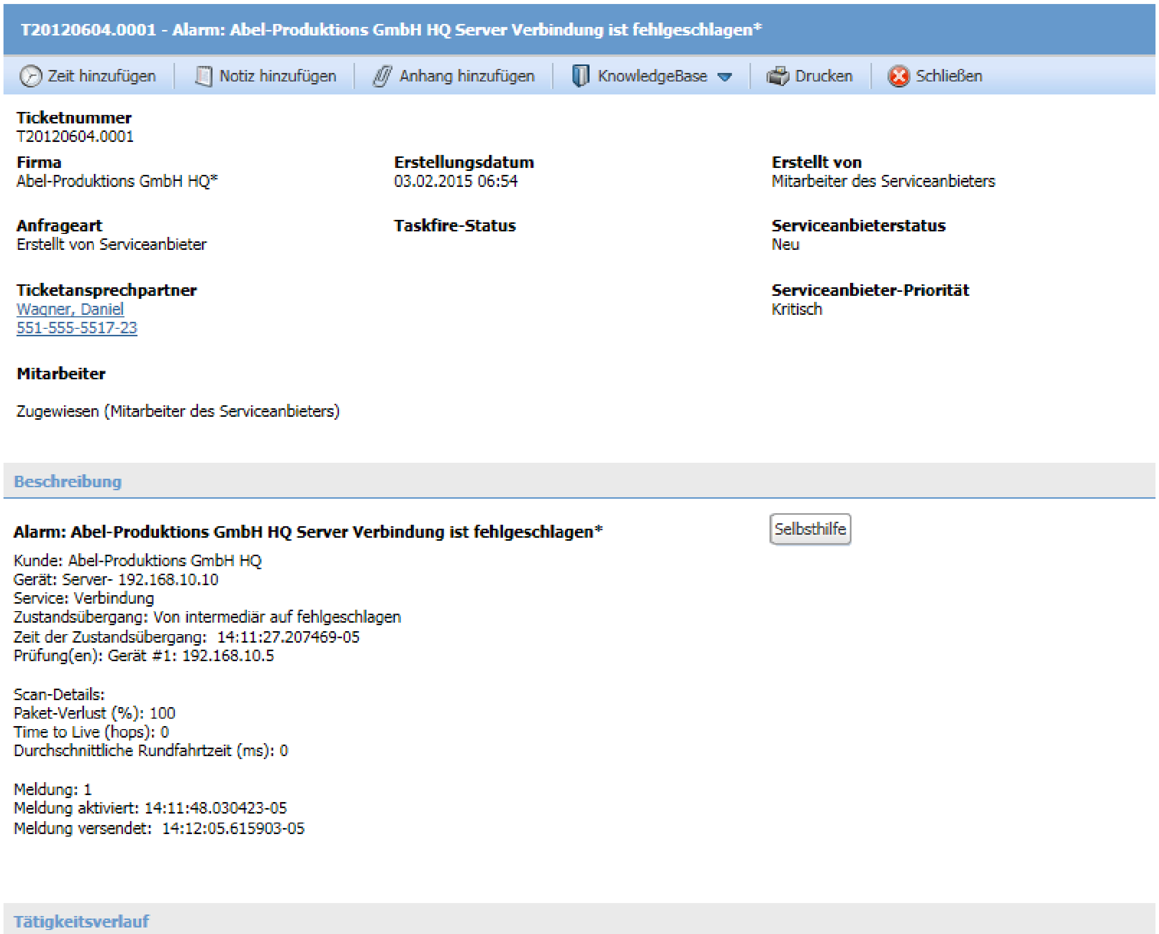
Reference Number
REF-898343

Reference Name

Work History

		DATE	RESOURCE	TITLE	HOURS	

No data to display



Standard Client Portal users see the following options on the task bar of a ticket:

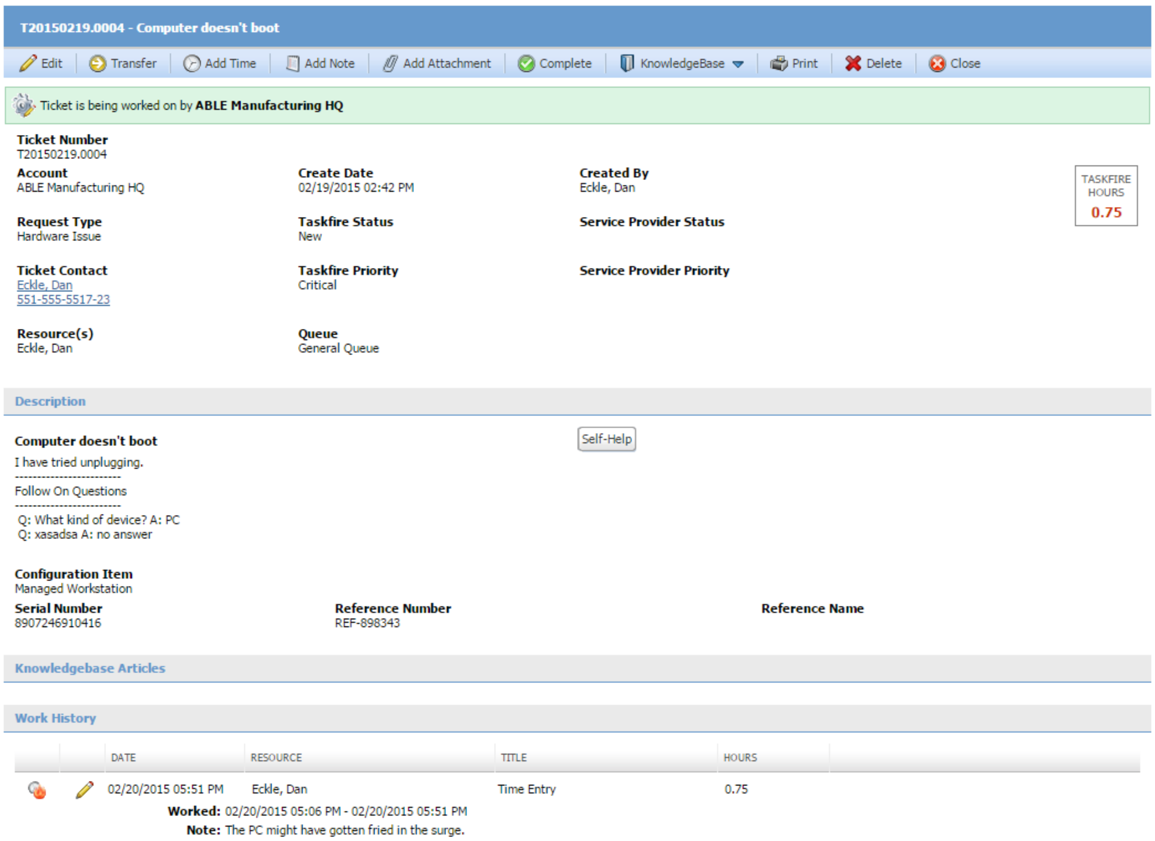
Field	Description
Add Note	Users can add a note to any ticket they can view. These notes can be viewed by internal and service provider resources. Refer to "Add a Ticket Note" on page 61.
Add Attachment	Users can add an attachment to any ticket they can view. These attachments can be viewed by internal and service provider resources. Refer to "Add Attachments" on page 63.
Knowledgebase	If the Knowledgebase is enabled, you will see a Knowledgebase option. Refer to "Use the Knowledgebase" on page 94.
Print	To print the ticket view, click **Print**.

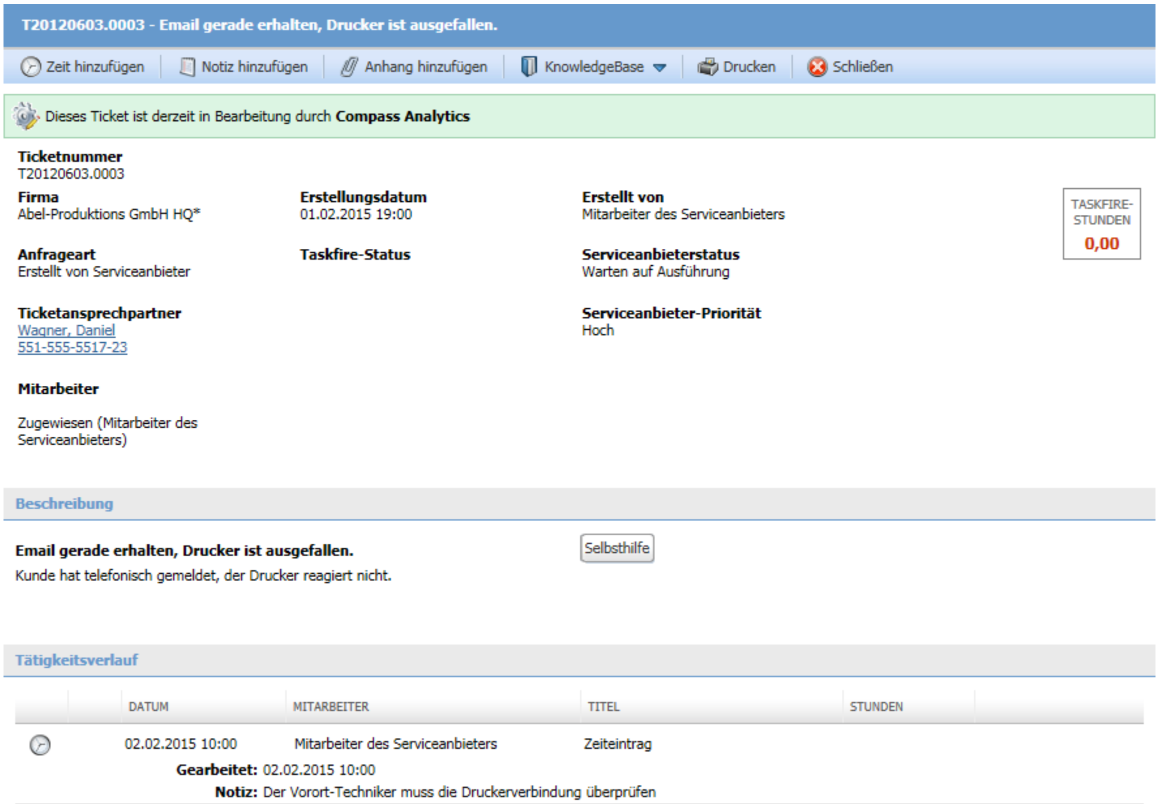
The ticket view for users with Taskfire security level

Users with a Taskfire security level are members of your internal help desk who are working on tickets. They might escalate some tickets to us, but for the tickets they work themselves, they need much the same functionality we have in Autotask.

Your Client Portal security level permissions determine whether or not you will see the Service Provider Priority field. By default, users with a standard Taskfire security license do see the Service Provider Priority. That permissions can be changed with a custom security level.

Taskfire users see the following additional options on the task bar of a ticket:





Option	Description
Edit	Taskfire users can put the ticket into Edit mode and modify a number of fields. Refer to "Edit a Ticket" on page 65.
Transfer	Tickets that were initially created as internal tickets can be manually transferred to a service provider. Refer to "Transfer a Ticket to a Service Provider" on page 72.
Add Time	Taskfire users are able to track their time on all tickets, internal or transferred. Refer to "Track Internal Time on a Ticket" on page 69. Resource time can be reported on using "The Time Tracking Report" on page 91.
Complete	Taskfire resources can complete tickets. This updates the Taskfire Status to complete. Taskfire Status is separate from the Service Provider Status, which is independently set by the service provider.
Delete	Taskfire users can delete Internal tickets, even if work has been performed on them. However, tickets that were transferred to a vendor cannot be deleted, and the Delete option is not displayed for transferred tickets.

Taskfire fields and functions will not appear on a ticket that was created before Taskfire was turned on for your company. To get this functionality, you must re-create the ticket.

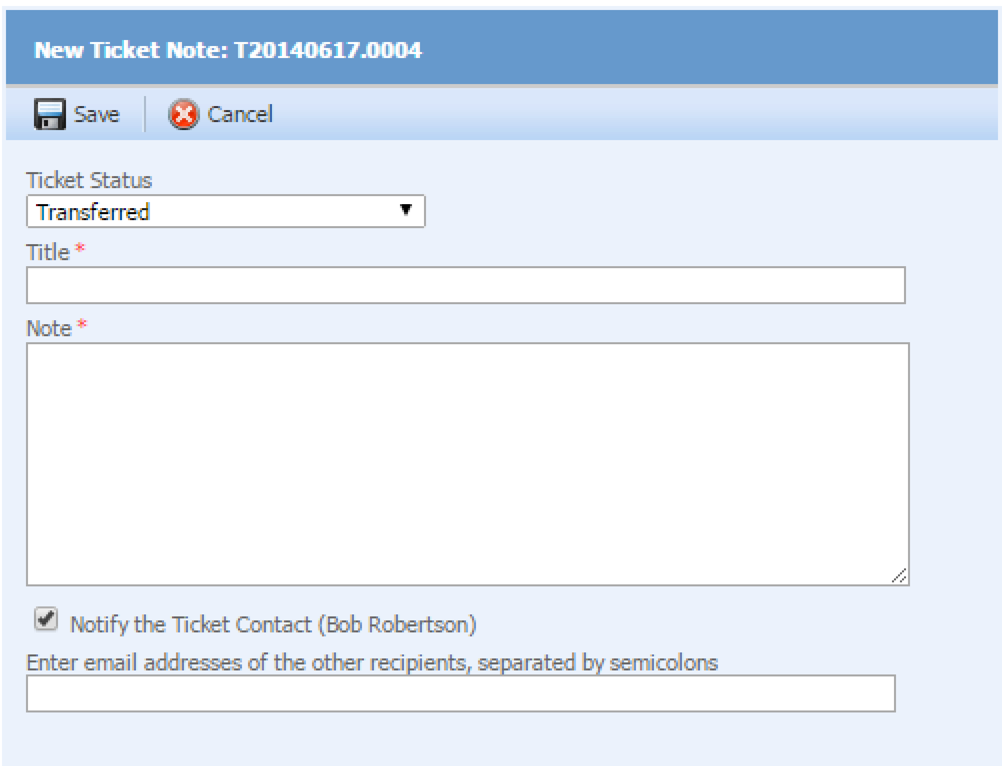
Add a Ticket Note

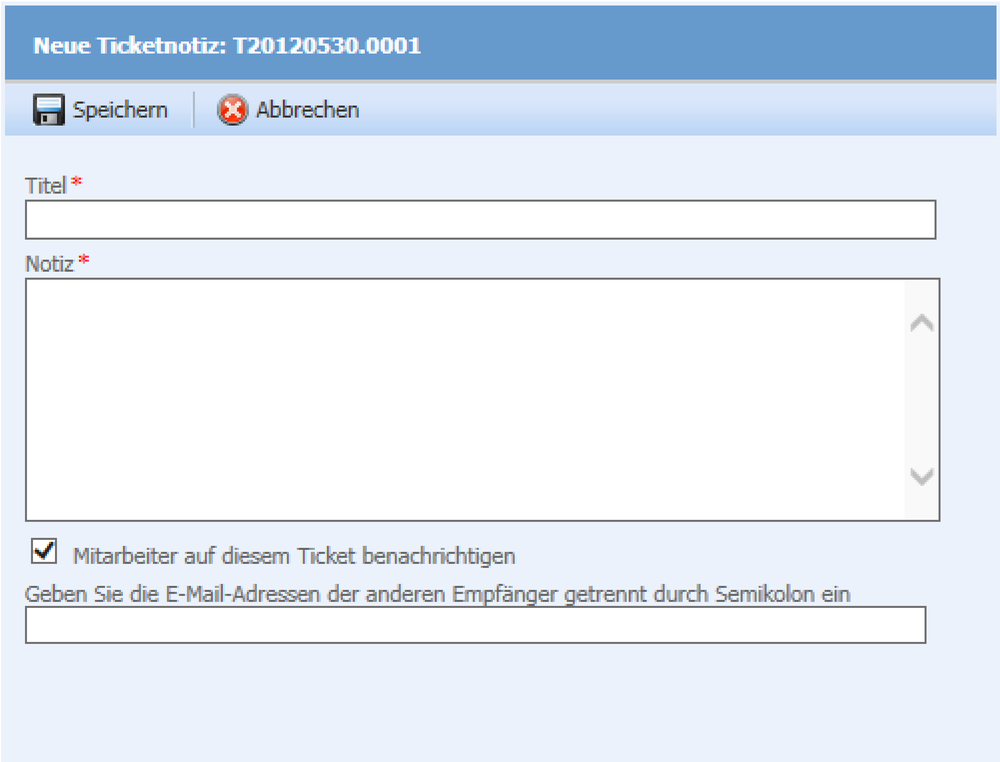
All users with access to the ticket

Ticket notes are used to track information, update the status, and communicate with internal and external ticket resources. All notes support email notification, which allows you to send the text of the note to selected individuals.

To add a ticket note...

1. Find the ticket to which you would like to add a note and open it.
2. On the Ticket View page, click **Add Note**. The Note page opens.





3. Complete the following fields:

Field	Description
Ticket Status	This field is only displayed for users with a Taskfire security level. It refers to the Taskfire, that is the internal help desk status of the ticket. The service provider has a separate status field. The status can be updated as needed.
Title	The Title field is required.
Note	The Note field is required.
Notify the Resource on this Ticket / Notify the Ticket Contact	Users with a standard security license will see **Notify the Resource on this Ticket**, users with a Taskfire security license will see **Notify the Ticket Contact**. By default, this box is checked.
Enter email addresses of the other recipients, separated by semicolons	If you enter any email address, the contents of the note will be sent to the recipients as an email. They do not have to be Client Portal or Autotask users.

4. Click **OK** to add the note, or click **Cancel**.

Any resource on the ticket (at your company or ours) will automatically be notified via email. If you selected the **Notify the ticket contact** option, that person will also be notified via email that the note was added.

Add Attachments

All users with access to the ticket, project or Knowledgebase article

An attachment is a file that is linked to a ticket, project or Knowledgebase article, such as a screen shot of an error message or a Word document that provides background information.

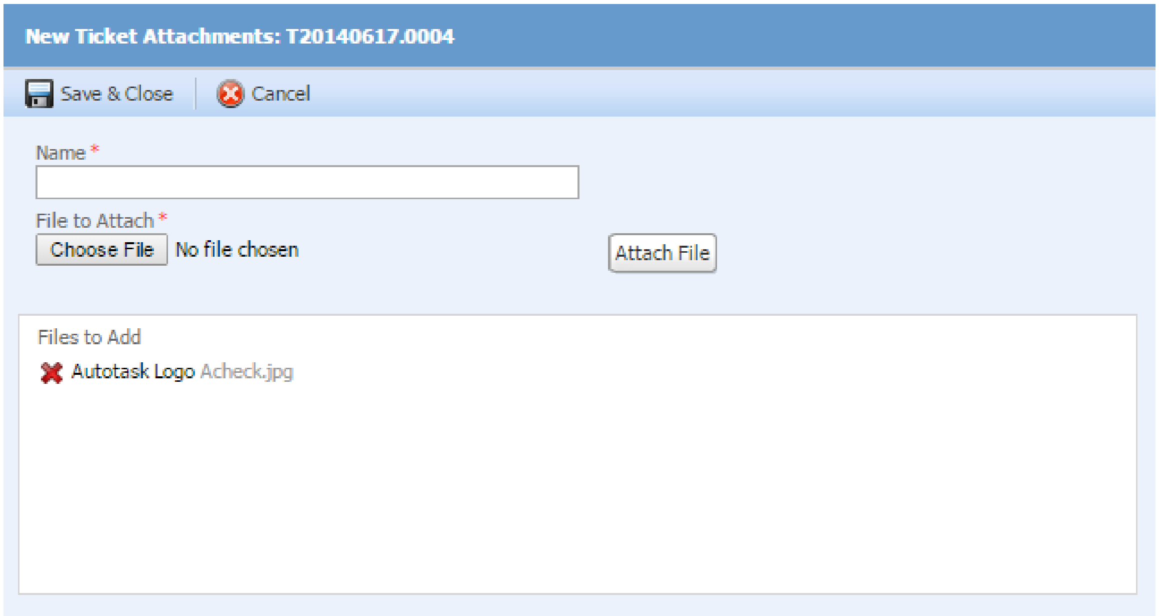
Supported File Types and Size

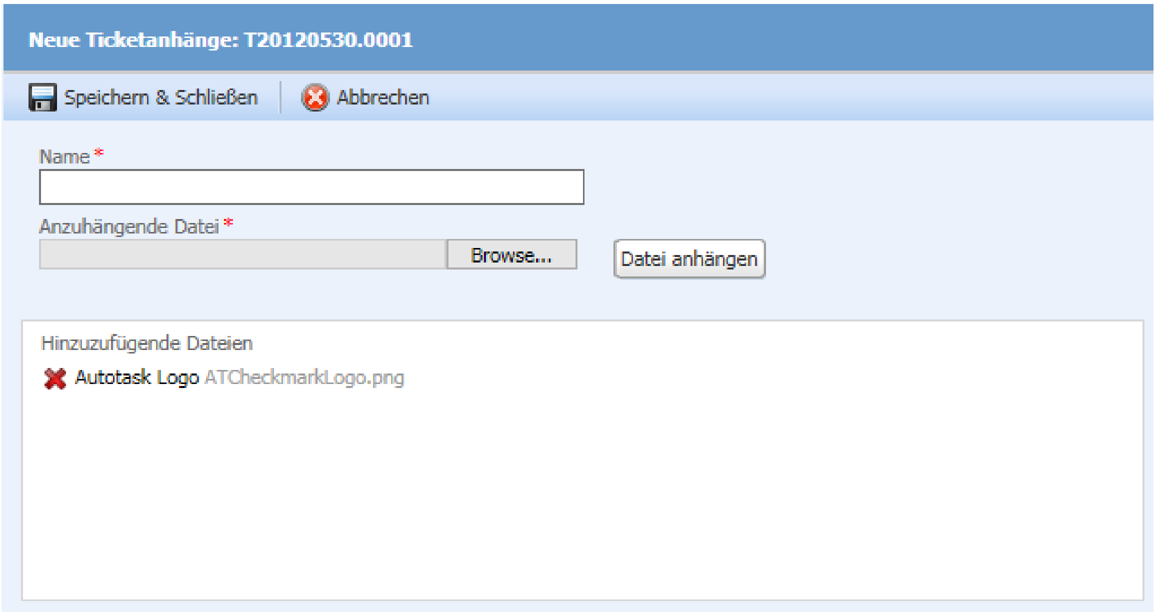
The file size for uploaded attachments is limited to **10 MB**. Autotask will **not accept** the following file formats: ade, adp, app, asp, aspx, bas, bat, cer, chm, class, cmd, cnt, com, cpl, crt, csh, cshtml, der, exe, fon, fxp, gadget, hlp, hpj, hta, inf, ini, ins, isp, its, iw, js, jse, ksh, lnk, mad, maf, mag, mam, maq, mar, mas, mat, mau, mav, maw, mda, mde, mdt, mdw, mdz, msc, msh, msh1, msh1xml, msh2, msh2xml, mshxml, msi, msp, mst, ops, osd, pcd, php, pif, plg, prf, prg, ps1, ps1xml, ps2, ps2xml, psc1, psc2, pst, reg, scf, scr, sct, shb, shs, tmp, url, vb, vbe, vbp, vbs, vsmacros, vsw, ws, wsc, wsf, wsh, xnk.

To add an attachment...

You must first save the parent entity (ticket, project or knowledgebase article). Then you can add an attachment.

1. Click **Add Attachment**. The New Ticket / Project / Knowledgebase Attachment page will display.





2. Enter a **Name** for your attachment.
3. Click **Browse** or **Choose File** to locate and select your attachment.
4. Click **Attach File**. It will appear on the list at the bottom of the page.
5. To create additional attachments for this item, repeat steps 2 - 4.

To remove an attachment, click the **Delete** icon next to it in the list.

6. When you have added all attachments, click Save & Close.

   The files will be uploaded and can be accessed by everyone with access to the ticket.

Edit a Ticket

Users with a Taskfire security level can edit tickets that are being worked on by your internal help desk

On any ticket grid, click the magnifying glass on a ticket row to open the ticket, then click the Edit icon

When you create a ticket and assign it to your internal help desk, a number of fields remain editable as long as:

- You have a Taskfire security level
- The ticket status is not equal to Complete
- The ticket was created after Taskfire was enabled for your Client Portal

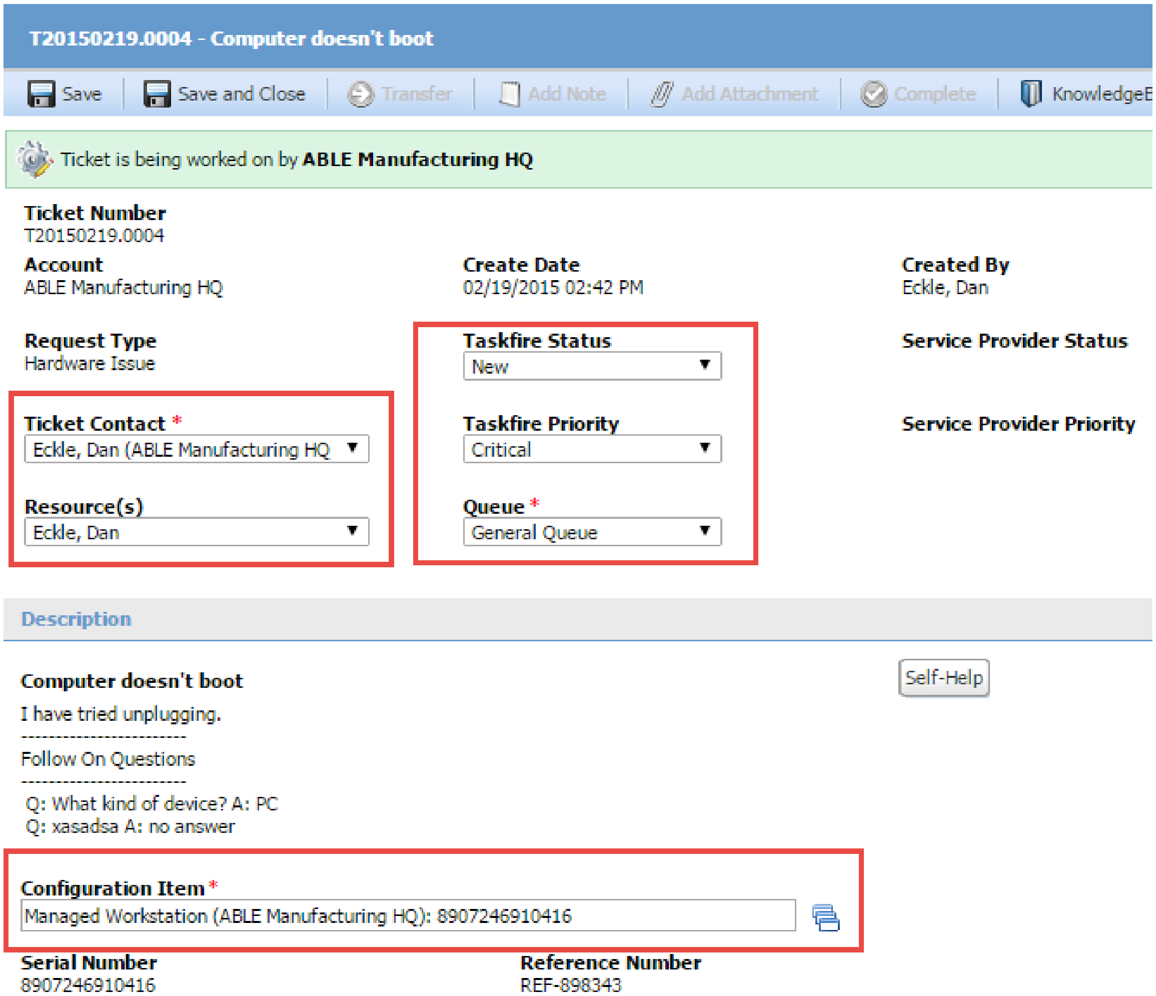
Refer to "Find a Ticket Using Ticket Grids" on page 54 for information on how to search for a ticket.

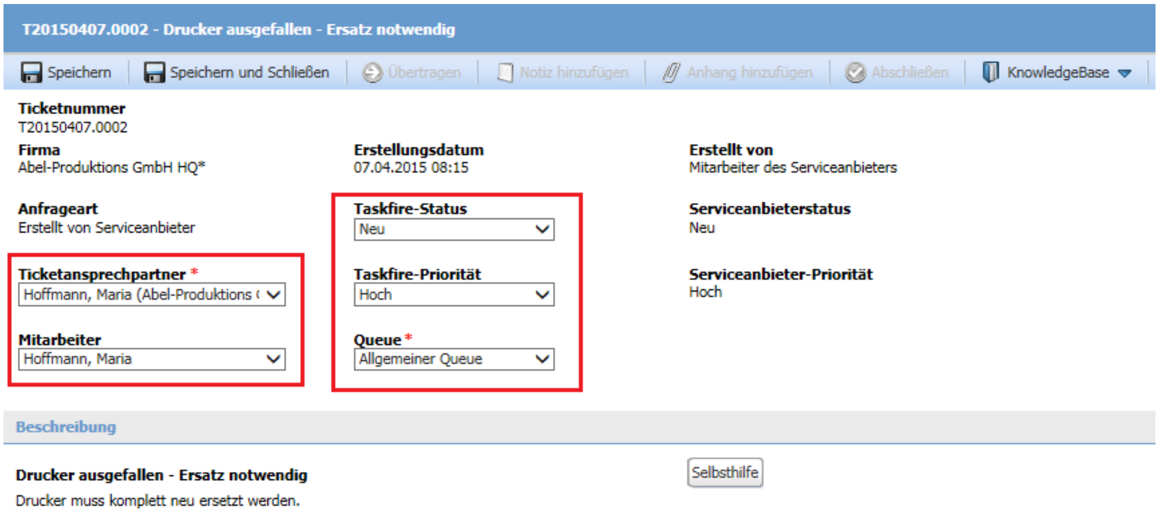
How to...

Edit a ticket

1. Click the **Pencil** icon at the top of the ticket preview page or window.

   The ticket opens in edit mode. The fields you can change are active for editing. The fields you cannot edit, such as the transferred status and priority, are not active for editing:


T20150219.0004 - Computer doesn't boot
Save
Save and Close
Transfer
Add Note
Add Attachment
Complete
Ticket is being worked on by ABLE Manufacturing HQ
Ticket Number
T20150219.0004
Account
ABLE Manufacturing HQ
Create Date
02/19/2015 02:42 PM
Created By
Eckle, Dan
Request Type
Hardware Issue
Taskfire Status
New
Service Provider Status
Ticket Contact *
Eckle, Dan (ABLE Manufacturing HQ
Taskfire Priority
Critical
Service Provider Priority
Resource(s)
Eckle, Dan
Queue *
General Queue
Description
Computer doesn't boot
Self-Help
I have tried unplugging.
Follow On Questions
Q: What kind of device? A: PC
Q: xasadsa A: no answer
Configuration Item *
Managed Workstation (ABLE Manufacturing HQ): 8907246910416
Serial Number
8907246910416
Reference Number
REF-898343



2. Make the required changes. You can edit the following fields:

Field	Description
Resource(s)	You can change the internal resource assigned to the ticket. Click the dropdown and select any resource with a Taskfire security level.
Ticket Contact	This is the person that we will contact if we need additional information.

Field	Description
Taskfire Status	The Taskfire Status is assigned by your company. Initially, it is populated by the Request Type, but you can change it in Edit mode. The following statuses are available: **New**: Use for a brand new ticket. **In Progress**: Use for a ticket that is currently being worked on internally at your company. **On Hold**: Use for a ticket that has been placed on hold. **Transferred**: Use for a ticket that has been transferred to us or another party to work on. **Transfer Complete**: Use to indicate that the party the ticket was transferred to (either us or another vendor) has completed work on the ticket and it is now back in your court. **Complete**: Use to indicate that the resource at your company has completed work on the ticket. When you set a ticket's status to complete and save it, you will no longer be able to edit it. If this ticket has gone back and forth between you and us, you may also want to add a note stating you have completed work on it so we will know to complete our version of the ticket. Any tickets that were created before you enabled Taskfire will appear with a Taskfire Status of "Transferred."
Taskfire Priority	The Taskfire priority is assigned by your company. Initially, it is populated by the request type, but you can change it in edit mode.
Queue	A ticket queue is a location where related tickets are stored. Each queue has resources assigned to it who are tasked with monitoring the queue and responding to the issues placed into the queue. Resources view queues on the Tickets drop-down menu and will only see the queues they are assigned to monitor. If there is no resource on the ticket all members of the queue will receive notifications on ticket activity, unless that option is turned off on the queue detail page. See "Manage Ticket Queues" on page 26 for details. Select a different queue from the Queue drop-down list. Note that this can change the resources who will be able to see the ticket.
Configuration Item	When you edit the ticket, you can also select a different configuration item from the drop-down list. Configuration items on the drop-down list appear in the following format: [Configuration Item Name] [Serial Number] | [Reference Number] | [Reference Name]. This helps you easily differentiate between configuration items that have the same name.

3. Click **Save**.

Track Internal Time on a Ticket

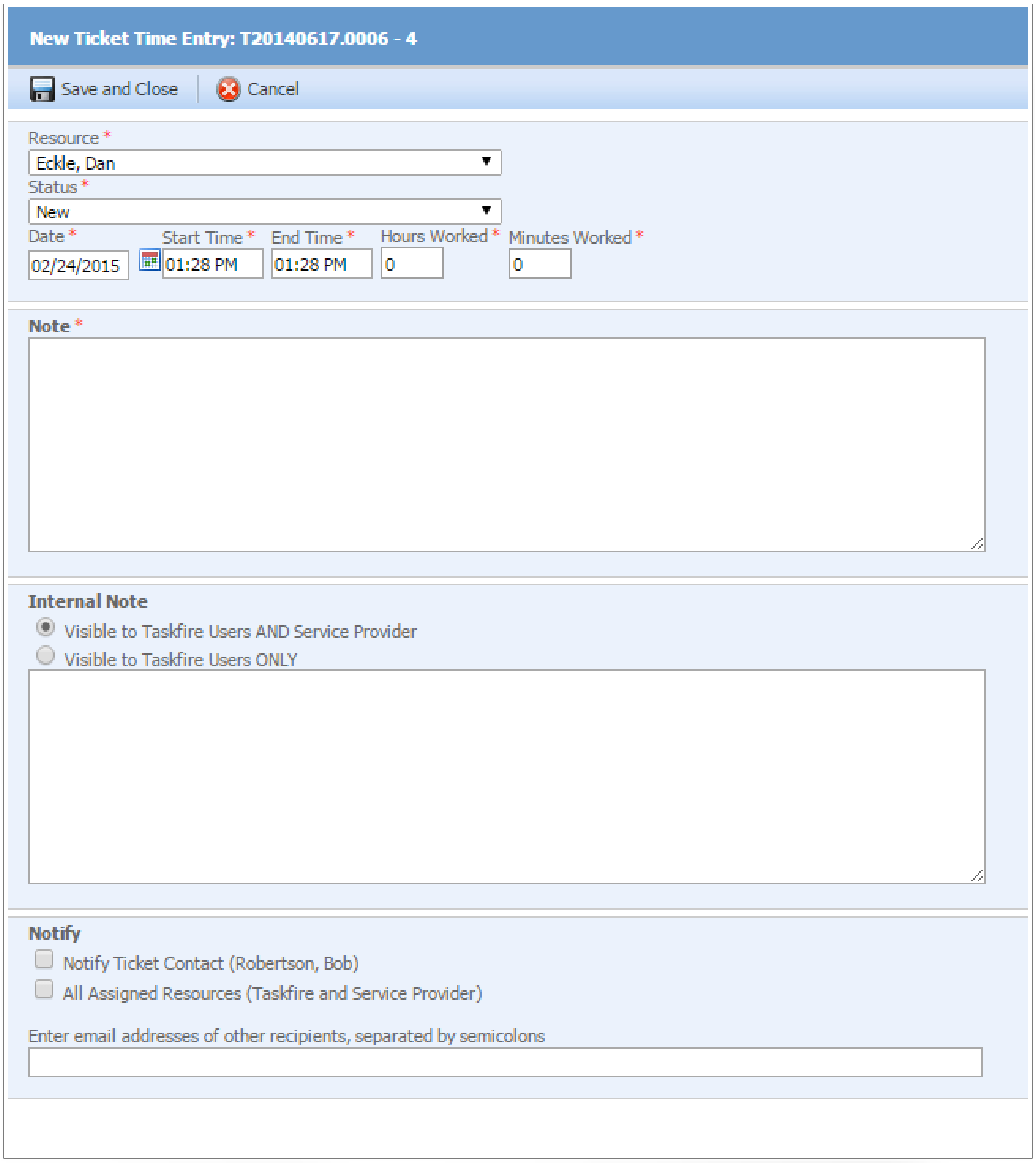
Users with a Taskfire security level can enter time on tickets that are being worked on by your internal help desk

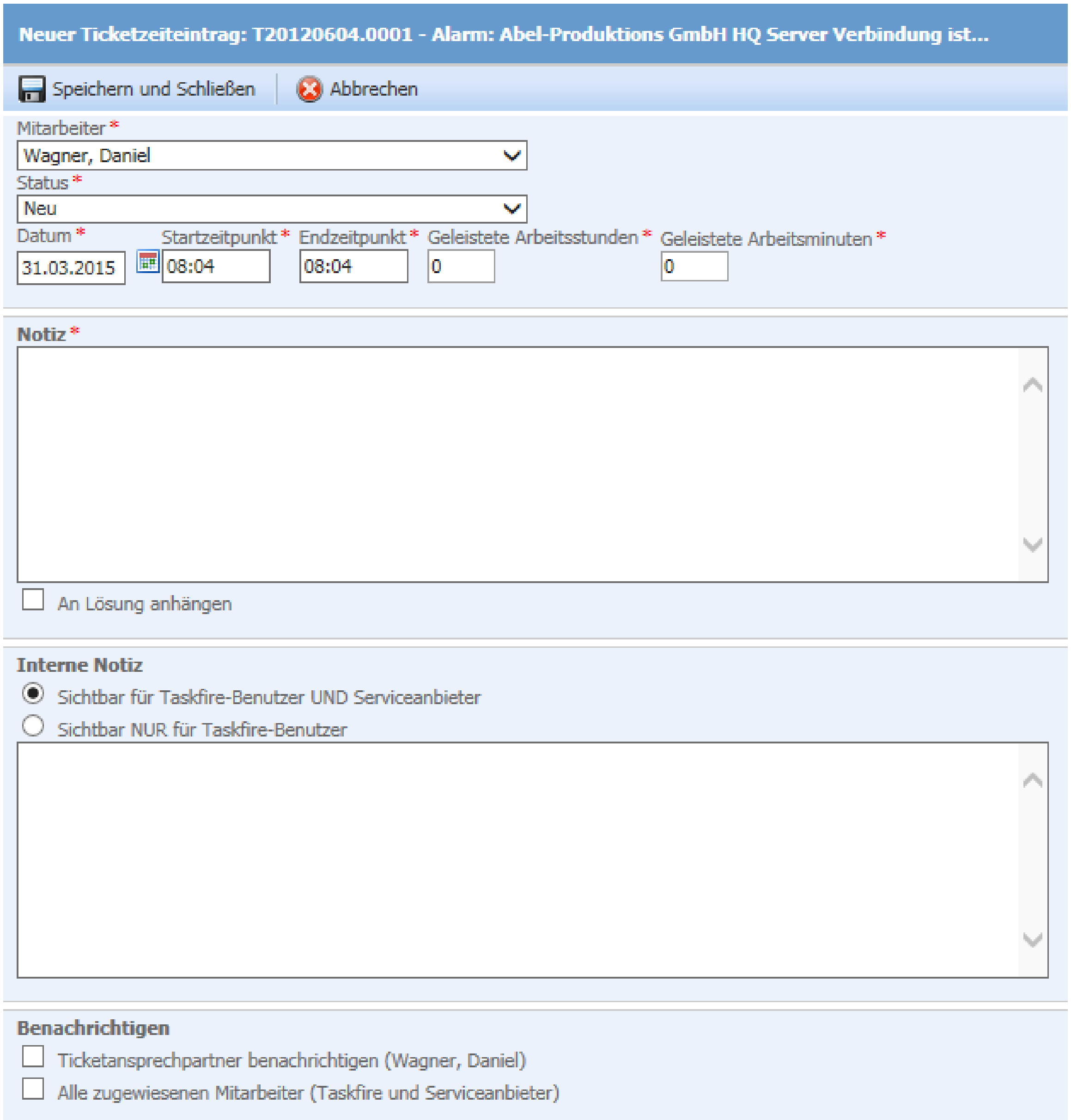
On any ticket grid, click the magnifying glass on a ticket row to open the ticket, then click **Add Time**

Time entries are used to track the time you've spent working on a ticket and to record the type of work you've performed. Users with access to all your company's tickets can run a Time Tracking Report that summarizes internal work by Company, Configuration Item, Request Type, Resource or Queue. Refer to "The Time Tracking Report" on page 91.

To add a ticket time entry...

1. Find the ticket to which you want to add time and open it.
2. On the Ticket View page, click **Add Time** to open the Time Entry window.


New Ticket Time Entry: T20140617.0006 - 4
Save and Close
Cancel
Resource *
Eckle, Dan
Status *
New
Date *
02/24/2015
Start Time *
01:28 PM
End Time *
01:28 PM
Hours Worked *
0
Minutes Worked *
0
Note *
Internal Note
Visible to Taskfire Users AND Service Provider
Visible to Taskfire Users ONLY
Notify
Notify Ticket Contact (Robertson, Bob)
All Assigned Resources (Taskfire and Service Provider)
Enter email addresses of other recipients, separated by semicolons



3. Populate the following fields:

Field	Description
Resource	Taskfire Administrators can change the name of the resource and add time on another user's behalf.
Status	Select the appropriate ticket status

Field	Description
Date and Time fields	The date defaults to the current date, and both Start and End Date to the current time. You can change either field, or enter the hours and minutes worked. In that case, the Start Time is recalculated.
Note	The text entered into the Note field is visible to all users with access to the ticket.
Internal Note	Before you enter an Internal Note, use the radio buttons to indicate whether or not you'd like the note to be visible to your Service Provider.
Notify	Select or enter the recipients of an email that contains the text of the note.

4. Click **Save and Close**.

Transfer a Ticket to a Service Provider

Taskfire security levels only

Open the ticket you want to transfer from one of the ticket grids

There are times when you might need to manually transfer a ticket to us or another service provider for assistance.

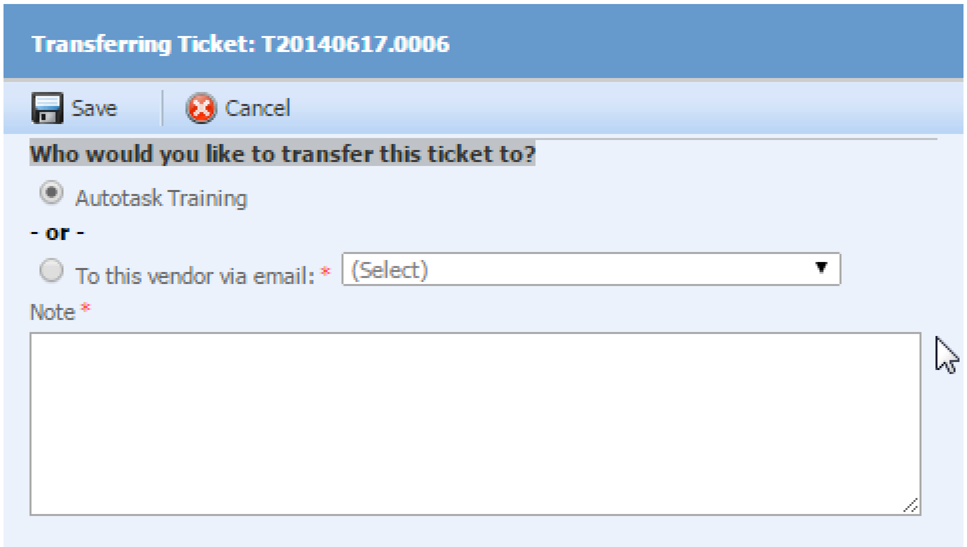
Let's say you usually handle printer issues in-house and we handle server issues. You have a printer issue that turns out to be a network connection problem. You can transfer the ticket to us, we will complete our portion of the work, and then send the ticket back to you to finish work on your end.

You are also able to transfer the ticket to another vendor. You might want to use this feature to track internal service needs beyond IT, such as your electrician, plumber, or janitorial service.

You can configure Request Types so that certain tickets are automatically transferred (or escalated) to us. See "Manage Request Types" on page 22.

To manually transfer a ticket...

1. In the menu bar of the Ticket View, click **Transfer**. The Transfer Ticket window opens:



2. Populate the following fields:

Field	Description
Radio button: Who would you like to transfer this ticket to?	The radio button defaults to our company name. If you select this option, the ticket will appear in the appropriate queue in our database where we will see it and schedule work on it. A new external status: **Transferred Status** and external priority: **Transferred Priority** will appear. We may ask you a question via system note. If we do, you'll be notified. Or, we may complete the ticket, in which case your internal Status will be updated to **Transfer Complete**, and you'll be notified that our work on the ticket is finished.
	If you select **To this vendor via email:** a snapshot of the ticket is taken and is pasted into an email, which is sent to the vendor. A new external ticket status **Transferred to this Vendor** appears with the name of the vendor (click the name to view the contact information). You will still need to track and update the ticket in Client Portal.
Vendor selection dropdown	This field is only enabled when **To this vendor via email:** is selected. Select another vendor from the dropdown.
Note	Enter text describing the issue and why you are transferring the ticket.

3. Click **OK**.

Work with Projects in Client Portal

To view projects in the Client Portal, your security level must include Projects access or you must be a client team member on the project

Projects > My Projects

A project is a carefully planned set of steps required to meet a specific business objective. Whether it is client facing or internal, short or long term, a project will likely include the following elements: a schedule with phases, assigned tasks with set deadlines, a project team, a budget, and reports to monitor progress. Autotask projects provide all of these elements.

How are projects different from tickets?

- Projects are proactive and planned. Tickets are often created in response to a customer issue.
- Projects consist of a number of possibly interdependent phases and tasks. Tickets are stand-alone, or a series of identical instances of the same assignment.

Client Portal users can follow and work with us on projects we have set up for your company.

If your company is the Company to bill for another customer, you can view details for projects and tickets for which you are being billed. To access a list of the projects for which you are the Company to bill, select End Client Projects from the **Projects** tab right-click menu. Refer to "Monitor End Client Tickets and Projects" on page 101.

To open a project, click the project name on the **Projects > My Projects** list.

Working with a project

For more information on available project functions, see:

"View a Project" on page 74

"Work with Your Open Tasks" on page 82

View a Project

To view projects in the Client Portal, your security level must include Projects access or you must be a client team member on the project

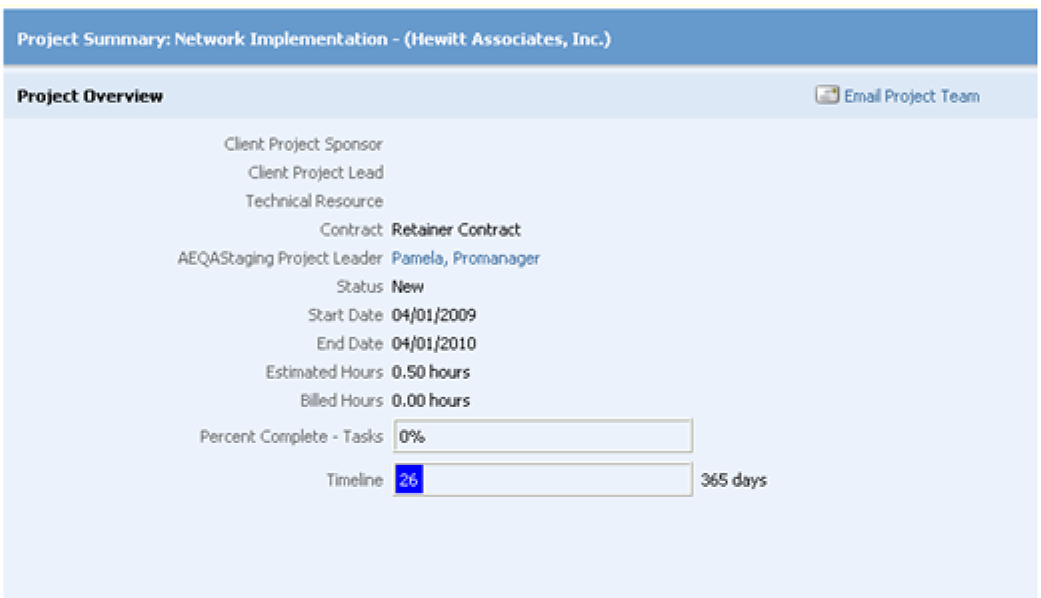
Projects > My Projects > click on a project

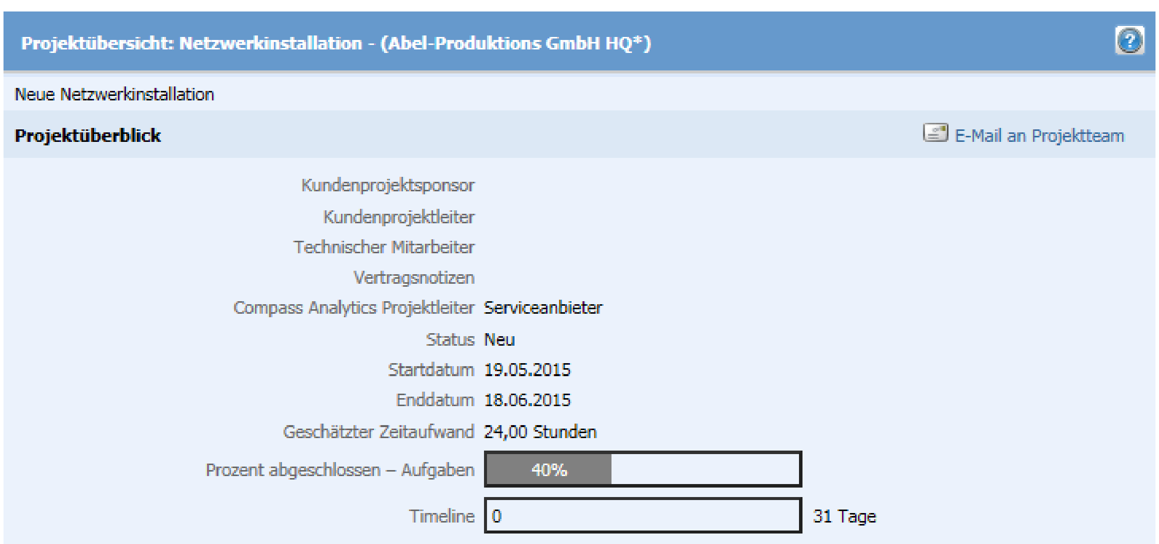
Projects open to the Project Summary page. On the left, you'll see the project menu. Clicking on the links will open pages that display information about the project.

About...

The Summary page

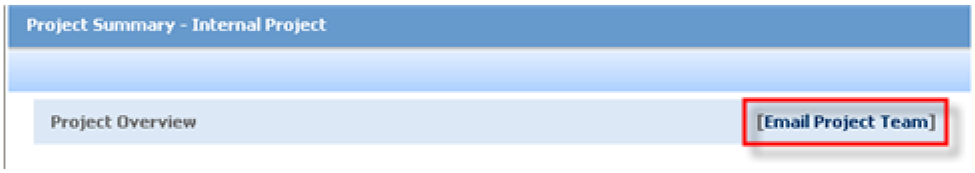
On the Summary page, you'll get a high-level project overview.

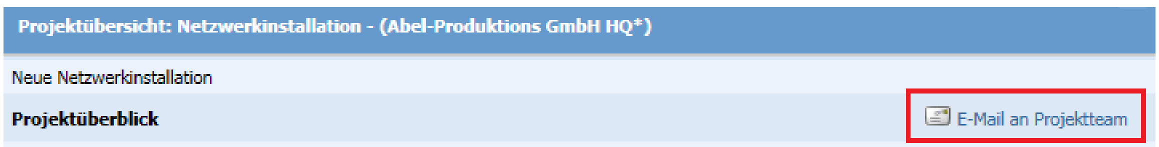




Also on this page, you can email the entire project team using the **Email Project Team** link at the top of the page.

1. Click **Email Project Team** at the top of the page.





2. On the Email Project Team window, select the project from the Projects drop-down menu (if necessary), and add a subject and the text of the email.
3. Click **Send** to send the email. The email will go to the project team lead and all team members.

The Schedule page

The project schedule shows you an outline of the project, including its phases and all the issues and tasks that are associated with it.

Project Schedule: Network Implementation - Blue Sky - (Blue Sky Group)

PHASE OR TASK TITLE	TASK STATUS	START DATE	END DATE	ESTIMATED HOURS	RESOURCE NAME
Planning & Design		**11/12/2007**	**12/01/2007**	**35.00**	
Internal Meeting	Complete	11/12/2007	11/12/2007	2.00	Service Provider
Build Spec Plan	Complete	11/13/2007	11/23/2007	20.00	Service Provider
Prepare Presentation	Complete	11/22/2007	11/26/2007	10.00	Service Provider
Customers Participation		**11/27/2007**	**12/01/2007**	**3.00**	
Presentation to customer	New	11/27/2007	11/27/2007	2.00	Service Provider
customers Approval	New	11/28/2007	12/01/2007	1.00	Service Provider
Order Equipment		**12/03/2007**	**12/07/2007**	**3.50**	
Order Servers	Complete	12/03/2007	12/07/2007	1.00	Service Provider

Projektzeitplan: Netzwerkinstallation - (Abel-Produktions GmbH HQ*)

TITEL DER PHASE ODER DER AUFGABE	AUFGABENSTATUS	STARTDATUM	ENDDATUM	GESCHÄTZTER ZEITAUFWAND	NAME DES MITARBEITERS
Planung		**19.05.2015**	**21.05.2015**	**5,00**	
Interne Besprechung	Abgeschlossen	19.05.2015	19.05.2015	2,00	
Kundenpräsentation	Abgeschlossen	21.05.2015	21.05.2015	3,00	Zugewiesen
Implementation		**21.05.2015**	**30.05.2015**	**19,00**	
Hardware bestellen	Warten auf Lieferanten	21.05.2015	21.05.2015	1,00	Zugewiesen
Installation for Ort	Neu	28.05.2015	30.05.2015	10,00	
Training vor Ort	Neu	30.05.2015	30.05.2015	8,00	

You can click on a task title to view the details, and to add notes or attachments to the task. Refer to "Work with Your Open Tasks" on page 82.

The Calendar page

The project calendar lists events that our project team members have added to the project. This could include meetings, webinars, days off, etc.

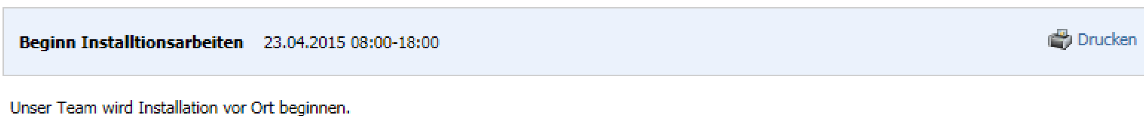
Project Calendar - Network Implementation

Print

SUBJECT	EVENT DATE	START TIME	END TIME
Clarification of Phase 1 Meeting	12/8/2008	8:00:00 AM	12:00:00 PM
Project Kick-off: Onsite	12/1/2008	8:00:00 AM	4:00:00 PM

Subject: Project Kick-off: Onsite
Event Date: 12/1/2008 Print

Project kick-off meeting at Phoenix.



Only our staff members can add events to the projects calendar, and this calendar does not integrate with other calendars.

To print the details of a particular event:

1. Click the event you would like to print. The details will display in the bottom frame of the page.
2. Click **Print**.

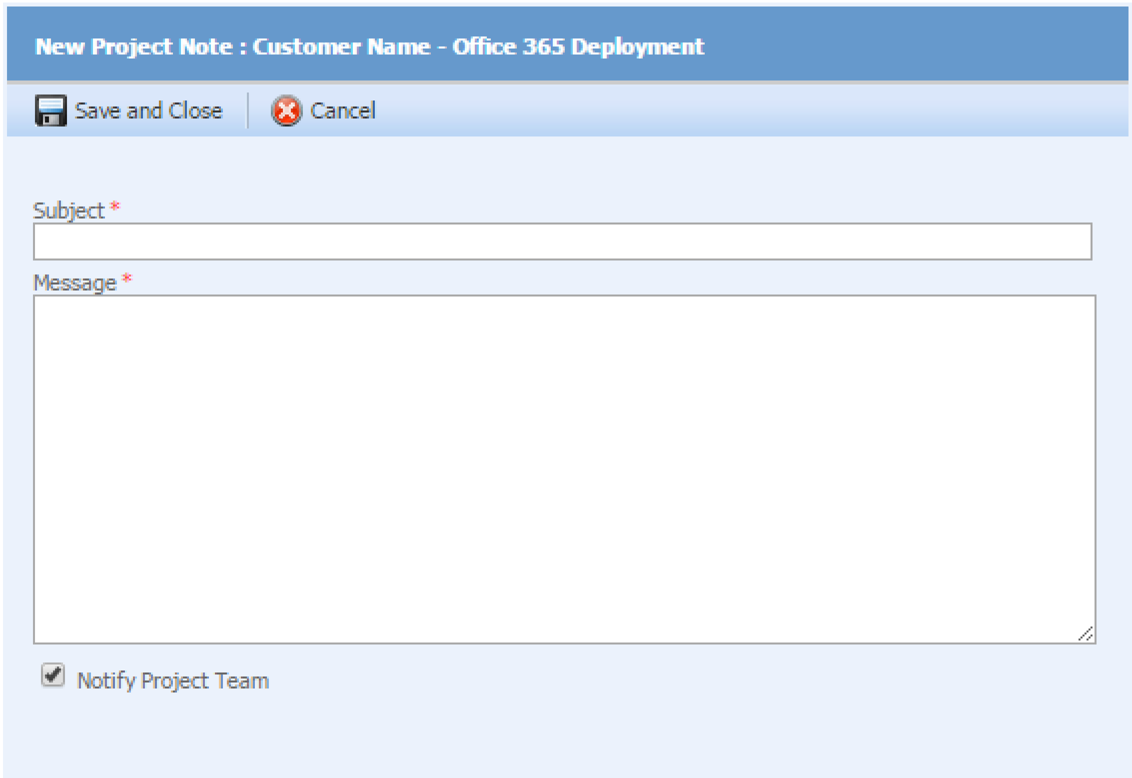
The Notes page

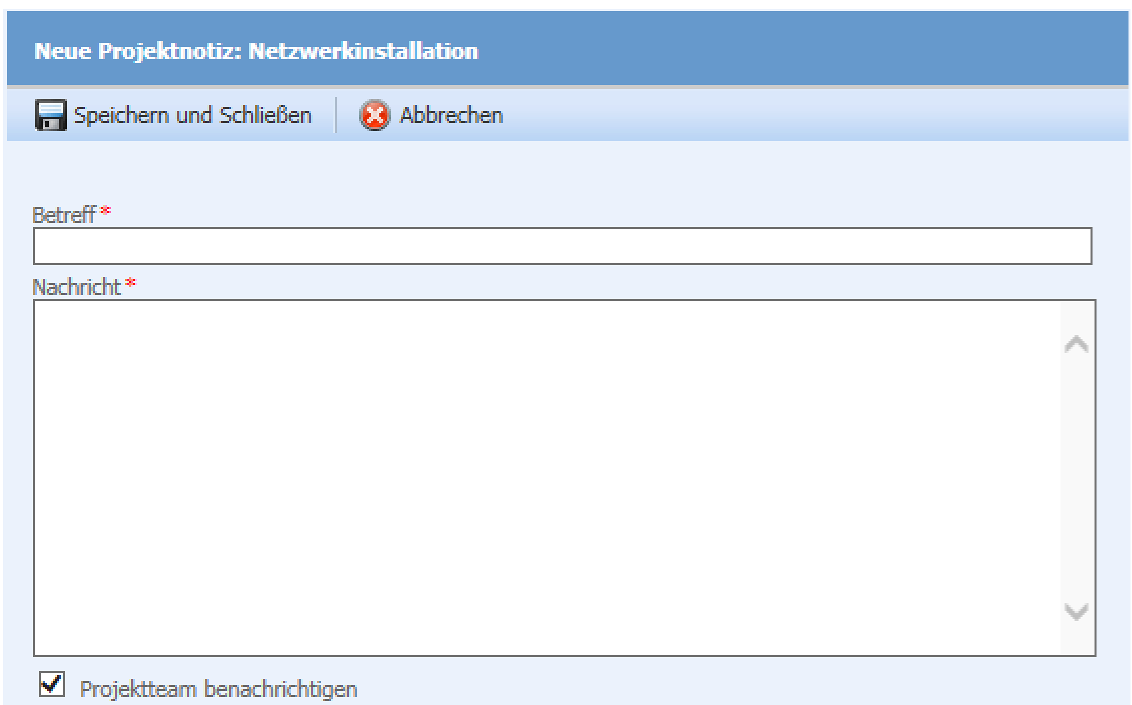
Project notes are used to communicate status, progress, and other issues with project team members. They keep all communications in one convenient place that all team members can access. You will also be able to open any attachments that we have added to a note, but you will not be able to add your own attachments through Client Portal.

Find the note you would like to view and click to open it. The note opens in the preview pane at the bottom of the page, where you can view or print it.

To add a project note:

1. On the **Project Notes** page, click **New Project Note** at the top of the page top open the New Project Note window:


New Project Note : Customer Name - Office 365 Deployment
Save and Close
Cancel
Subject *
Message *
Notify Project Team


Neue Projektnotiz: Netzwerkinstallation
Speichern und Schließen
Abbrechen
Betreff *
Nachricht *
Projektteam benachrichtigen

2. Enter a subject and the text of the note.
3. To notify all active project team members, select the notification check box.
4. Click **Save and Close**.

The Project Issues page

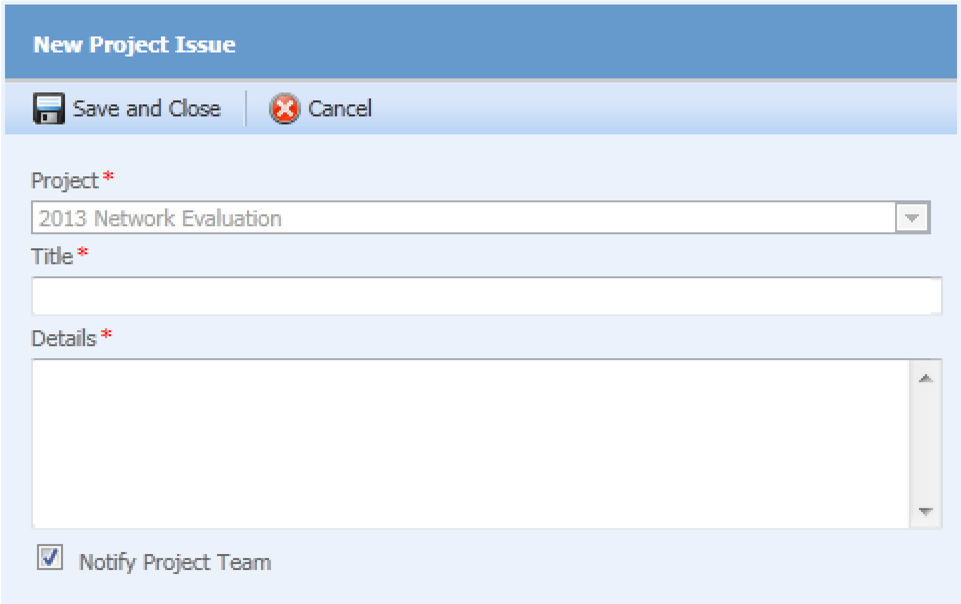
A project issue is a task or problem that arises after the original project schedule is developed. When you add an issue through the Client Portal, it will appear in the project schedule as well as on the Issues page. You can open it from either location.

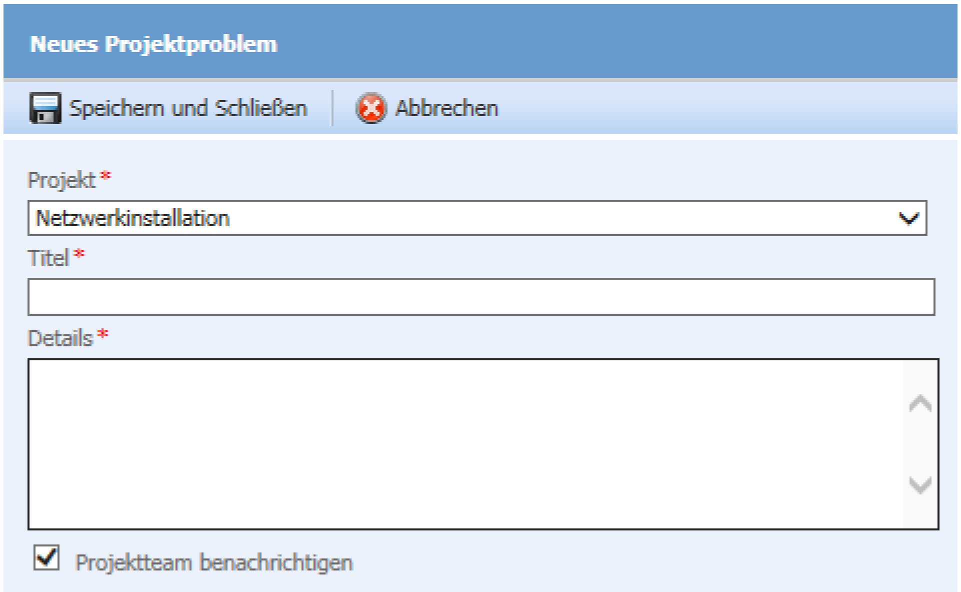
To add a project issue:

1. Click **New Project Issue**

   or

   Select **New Project Issue** from the Projects menu.
2. The New Project Issue window opens:





3. Select the Project Name, if you did not first open the project.
4. Enter a **Title** and **Details**.
5. Click **Save and Close**.

   The issue appears on the Project Issue page as well as in the project schedule. Note that in the schedule, it will appear at the top of the task list and will be at the project level (not as part of a project phase).

   The project lead is assigned as the resource and all active team members receive an email notification with details about the new issue. In addition, the issue will also show up on the Project Manager's Dashboard.

The Charges page

Client Portal Manager or Taskfire security level

Project charges track project-related charges for items other than labor. You may be billed for these charges as part of your project billing. Examples of project charges are hardware and software charges, and incidentals such as delivery charges. Change orders for project tasks will also appear on the Charges View.

Project Costs - Network Implementation (Phoenix Consulting Group)

Print

	DATE PURCHASED	COST	ALLOCATION CODE	BILLED AMOUNT
✓	12/05/2008	Server Purchase Review	Consulting	$250.00
✓	12/05/2008	Equipment	Equipment	$60.00
			Totals:	**$310.00**

Projektwarenposten: Netzwerkinstallation - (Abel-Produktions GmbH HQ*)

Drucken

KAUFDATUM	KOSTEN	ABRECHNUNGSGRUPPE	ABGERECHNETER BETRAG
16.05.2015	Router	Hardware	0,00 €
			0,00 €

Click **Print** if you would like to print the list of charges.

The Attachments page

Project attachments are added by the project team lead or other team members at our company. You can view these attachments, print them, save them to your computer, or add a new attachment.

Project Attachments - Network Implementation

New Attachment

	ATTACHMENT TITLE	FILE NAME	ATTACHED TO	SUBMITTED BY	DATE POSTED	SIZE
⚠	Project Plan Description Document	Project Plan.doc	Issue Note	Promanager, Pamela	12/05/2008	262,144 bytes

Projektanhänge: Netzwerkinstallation - (Abel-Produktions GmbH HQ*)

Neuer Anhang

	NAME DES ANHANGS	DATEINAME	ANHANG AN	EINGEREICHT VON	ERSTELLUNGSDATUM	GRÖßE
	Beschreibung des Projektplans	Projektplan.docx	Projekt	Wagner, Daniel	02.04.2015	262.516 Byte

To view an attachment, click the attachment line to open the attachment in a separate window.

To add an attachment, click New Attachment at the top of the page. Refer to "Add Attachments" on page 63.

Work with Your Open Tasks

All users

Projects > My Open Tasks, or click on a task in the project schedule

The core element of a project is the project schedule. It contains the tasks that are the specific work assignments for our staff.

The project schedule also contains any issues that were added to the project either by our staff or by you, through the Client Portal. They also appear on the Issues page of the project. Refer to "The Project Issues page" on page 80.

Tasks can be tracked at the project level, or inside of a phase or a sub-phase. Phases and sub-phases help us to organize the project, much like folders in Windows Explorer help you to organize documents.

When you add an issue to a project, it appears on the schedule at the project level (not within a phase or sub-phase).

What tasks appear in My Open Tasks?

When we add a task to the project schedule, we can name a specific user at your company as the "contact" and check a setting that allows that user to complete the task. Such tasks, and all tasks that have a status of **Waiting Customer** will appear on the **My Open Tasks** page.

On this page, you can do the following:

Icon	Description
Open Task Details	Click the task name to open it. The Task or Issue Details window opens in List View, displaying a description of the task and all task notes, time entries and attachments. You will be able to add a note of your own, and if the task is so configured, complete the task. Tasks that you can complete are typically tasks that describe steps that require your approval. You can also print the task from this view.
Respond to this Task via Email	Click the email icon on a task row. Your default email client will open, with our support email address already populated.
Enter a Task Note	Click the Note icon on to open the New Task Note window and enter a Subject and a Message.
Complete this Task	Some tasks are configured by us in such a way that you, the customer, can complete them. An example of a task that you might be able to complete would be "Approve Project Budget", or "Final Project Approval". Click the green check mark to complete the task.

View Reports

Varies

Reports

In the Client Portal, you can run the following reports:

- **Invoices Report**: View invoices for your company for a specific date range, or find invoices with a specific invoice number or range of numbers. Refer to "Invoices Report" on page 84.
- **Block Hours Report**: View information on block contract usage and remaining hours. Refer to "Block Hours Report" on page 86.
- **Retainer Report**: View information on retainer contract usage and remaining dollars. Refer to "The Retainer Report" on page 87.
- **Per Ticket Contract Report:** Tickets remaining and current tickets remaining, grouped by company and contract. Refer to "Per Ticket Contract Report" on page 88.
- **Ticket Report**: View a detailed ticket report with a variety of sorting options. Refer to "The Ticket Report" on page 89.
- **Time Tracking Report**: View information on time entered on tickets by Taskfire users. Refer to "The Time Tracking Report" on page 91.

Invoices Report

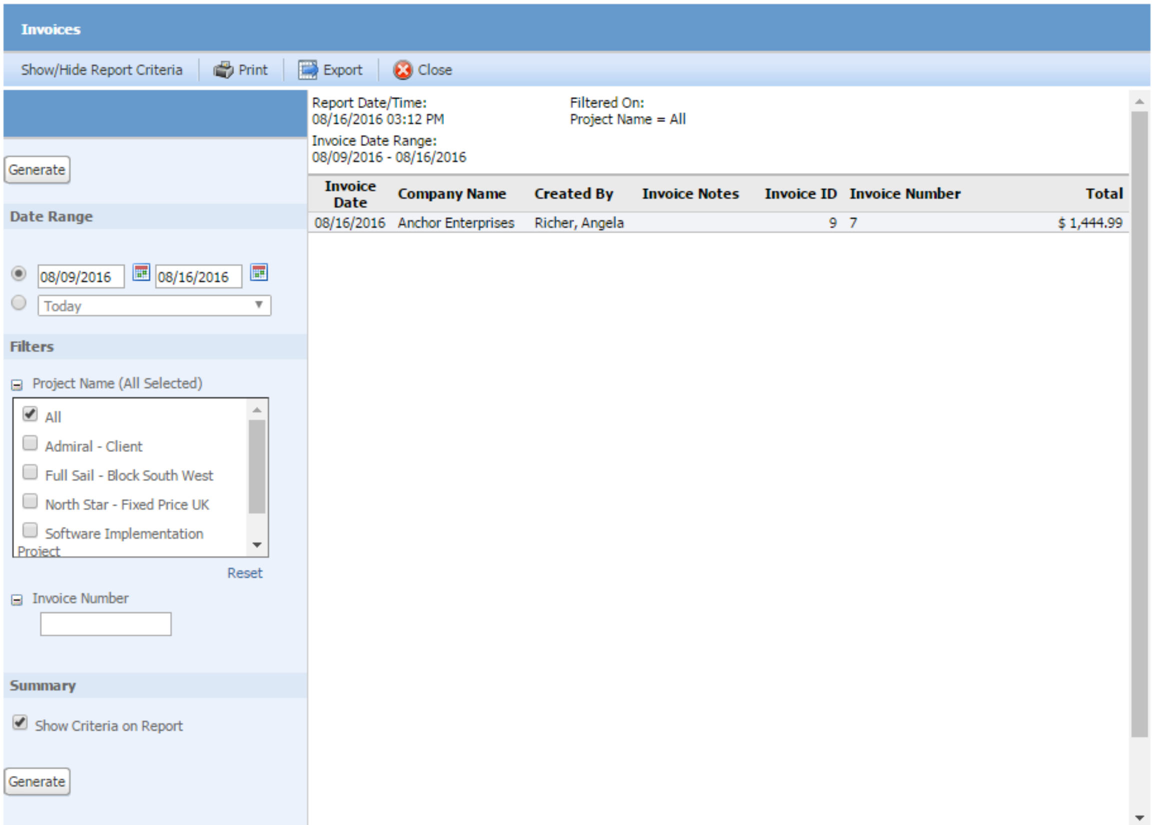
Client Portal Manager or Taskfire Administrator security level

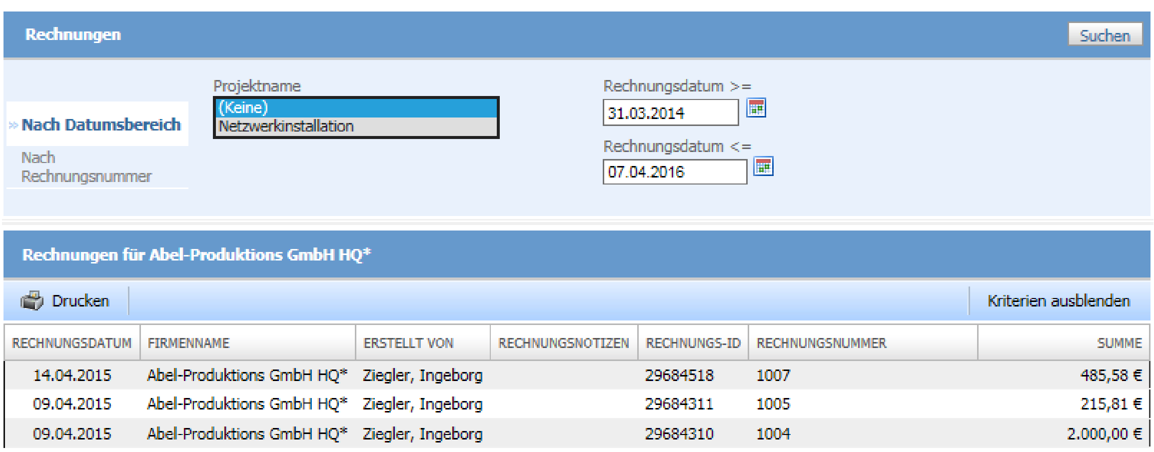
Reports > Invoices

View your company's invoices from us through Client Portal using the Invoices report on the Reports tab.

To run the Invoice report...

1. Hover over the Reports tab and select **Invoices** from the drop-down menu. The Invoices page opens.
2. Select the report criteria in the left pane. By default, the date range is for the last 7 days. You can also filter by project and invoice number.
3. Click **Show Criteria on Report** to display the report criteria at the top of the report.
4. Click **Generate**. A list of invoices meeting your criteria displays.





5. Click **Print** to print the list, or **Export** to export it to Excel.
6. Click on any row to open an individual invoice. You can print it, or generate a PDF view.
7. When you are finished viewing invoices, close the window.

Block Hours Report

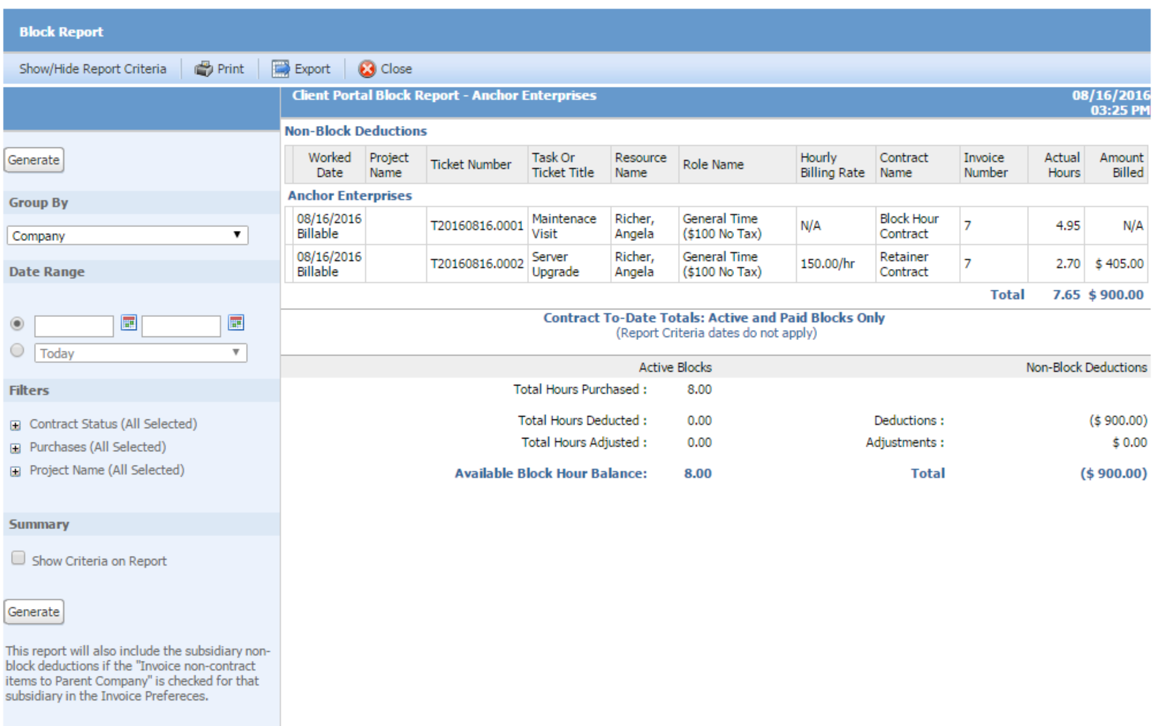
Client Portal Manager or Taskfire Administrator security level

Reports > Block Hour Report

View your prepaid labor through Client Portal using the Block Hours report on the Reports tab. You will have access to the Reports tab only if you have a Security Level of Manager or a custom Security Level that allows access to this report.

To run the Block Hours report...

1. Click the Reports tab and select **Block Hours Report** from the drop-down menu. The Block Report page opens.
2. Enter a date range for the report and narrow the results by contract, type of purchase, and/or project.
3. Click **Show Criteria on Report** to display the report criteria at the top of the report.
4. Click **Generate**. The report opens in the right frame.



The following sections of data are available for prepaid labor:

- **Block Purchases of [# of hours on [date]]** : This section details the task or ticket work that was applied towards your block hour purchase.
- **Non-Block Deductions**: This section details the task or ticket work that was not applied towards any prepaid labor agreement and any adjustments made to this labor after it was billed.
- **Contract To-Date Totals: Active and Paid Blocks Only**: This section provides totals for the active blocks and non-block deductions used and what the resulting and block balances are.

This section provides totals for ALL labor and is not filtered by the report criteria you entered when running the report.

The Retainer Report

Client Portal Manager or Taskfire Administrator security level

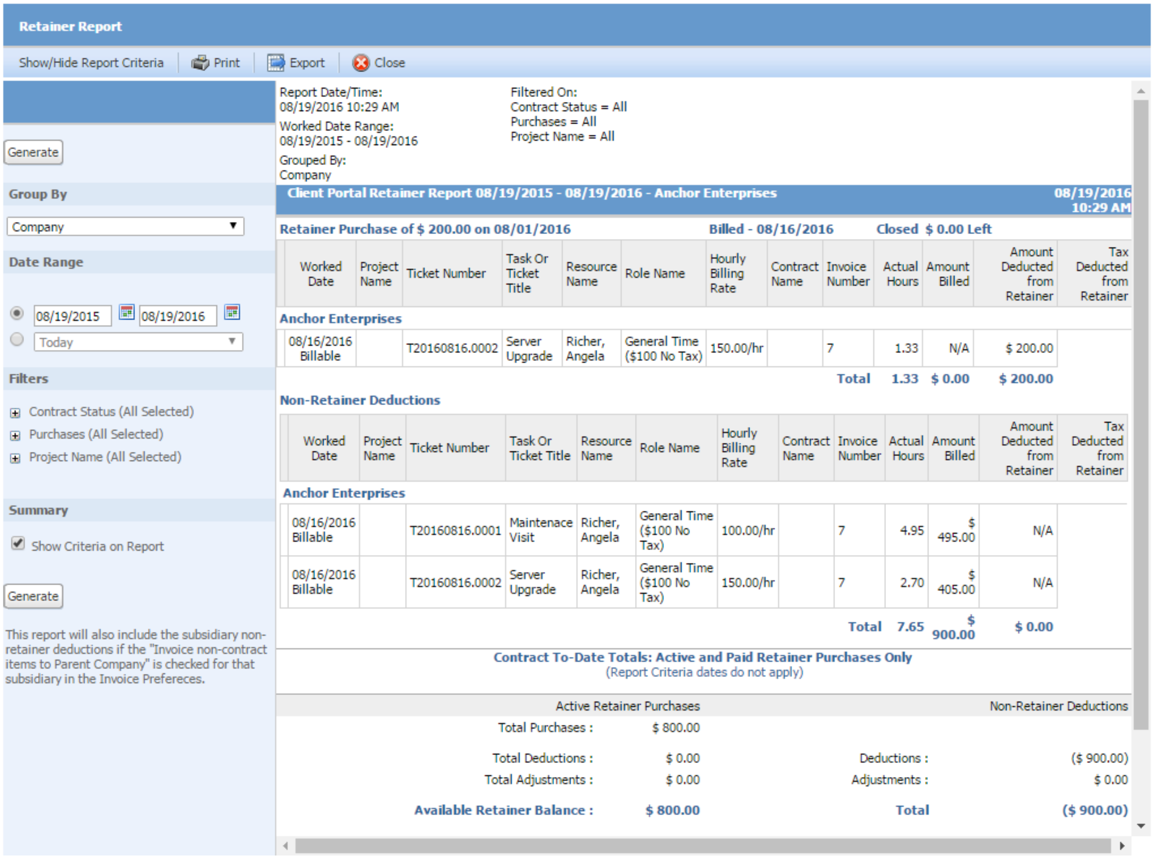
Reports > Retainer Report

View your prepaid dollars through Client Portal using the Retainer report on the Reports tab.

To run the Retainer report...

1. Click the Reports tab and select **Retainer Report** from the drop-down menu. The Retainer Report page opens.
2. Enter a date range for the report and narrow the results by contract, type of purchase, and/or project.
3. Click **Show Criteria on Report** to display the report criteria at the top of the report.
4. Click **Generate**. The report opens in the right frame.

   The following sections of data are available for prepaid labor:



- **Retainer Purchases of [amount]on [date]**: This section details the task or ticket work that was applied towards your block hour purchase.
- **Non-Retainer Deductions**: This section details the task or ticket work that was not applied towards any prepaid labor agreement and any adjustments made to this labor after it was billed.
- **Contract To-Date Totals: Active and Paid Retainer Purchases Only**: This section provides totals for the active retainer and non-retainer deductions used and what the resulting retainer balances are.

This section provides totals for ALL labor and is not filtered by the report criteria you entered when running the report.

Per Ticket Contract Report

Client Portal Manager or Taskfire Administrator security level

Reports > Per Ticket Contract Report

View your prepaid labor through Client Portal using the Per Ticket Contract report on the Reports tab.

To run the Per Ticket Contract report...

1. Click the Reports tab and select **Per Ticket Contract Report** from the drop-down menu. The Report Criteria frame opens.
2. Enter a date range for the report and narrow the results by contract status.
3. Click **Generate**. The report opens in the right frame.

   The following sections of data are available for prepaid labor:

Contract Balance for Per Ticket Contract — **Report Date/Time:** 09/04/2014 04:40 PM

Company: ABLE Manufacturing HQ

Ticket Number	Ticket Title	Ticket Created/Transferred	Ticket Created By	Ticket Completed	Hours Worked
Contract: Able Manufacturing - Emergency (05/15/2012 - 05/14/2015)				Tickets Used: 2	Current Tickets Remaining: 5
10 Ticket(s) (05/15/2012 - 05/14/2013)				Tickets Used: 1	Tickets Remaining: 9
T20120530.0001	Dan is still having issues with his em ail*	06/12/2012	Administrator, Autotask	08/18/2014	5.00
1 Ticket(s) (08/27/2013 - 08/27/2013) (PO: 515877)				Tickets Used: 1	Tickets Remaining: 0
T20130827.0003	New UPS Installation	08/27/2013	Hockenberry, Melissa	08/27/2013	1.07

Company: E.G. Sawyer LLC

Ticket Number	Ticket Title	Ticket Created/Transferred	Ticket Created By	Ticket Completed	Hours Worked
Contract: E. G. Sawyer -Per ticket Emergency (12/01/2012 - 09/01/2014)				Tickets Used: 2	Current Tickets Remaining: 0
1 Ticket(s) (09/06/2013 - 09/06/2013)				Tickets Used: 1	Tickets Remaining: 0
T20130906.0001	Issue with the processing of our inv oices in QB	09/06/2013	Hockenberry, Melissa	06/02/2014	0.00
1 Ticket(s) (02/20/2014 - 02/20/2014)				Tickets Used: 1	Tickets Remaining: 0
T20140220.0001	Printer issue	02/20/2014	Hockenberry, Melissa	06/02/2014	0.00

- **Contract: [Contract Name] [contract date range]**: This header row details the contract information including number of Tickets Used on the Contract as well as the Current Tickets Remaining.
- **[#]Tickets [ticket purchase date range]**: This section details the completed tickets that consumed an incident including its Create Date, Created By, Complete Date, and Hours Worked. The ticket can be accessed by clicking on the Ticket Number from within the report.

The Ticket Report

Any user who can see all tickets for their company can access this report.

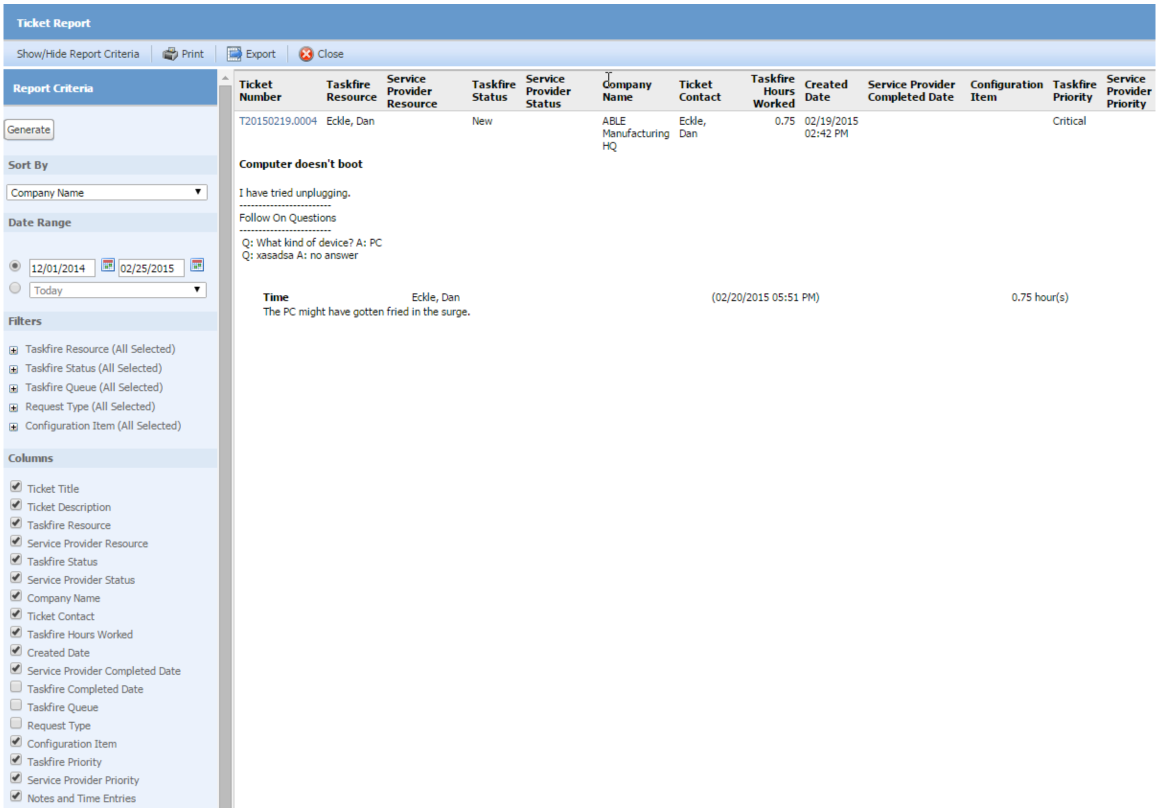
Reports > Ticket Report

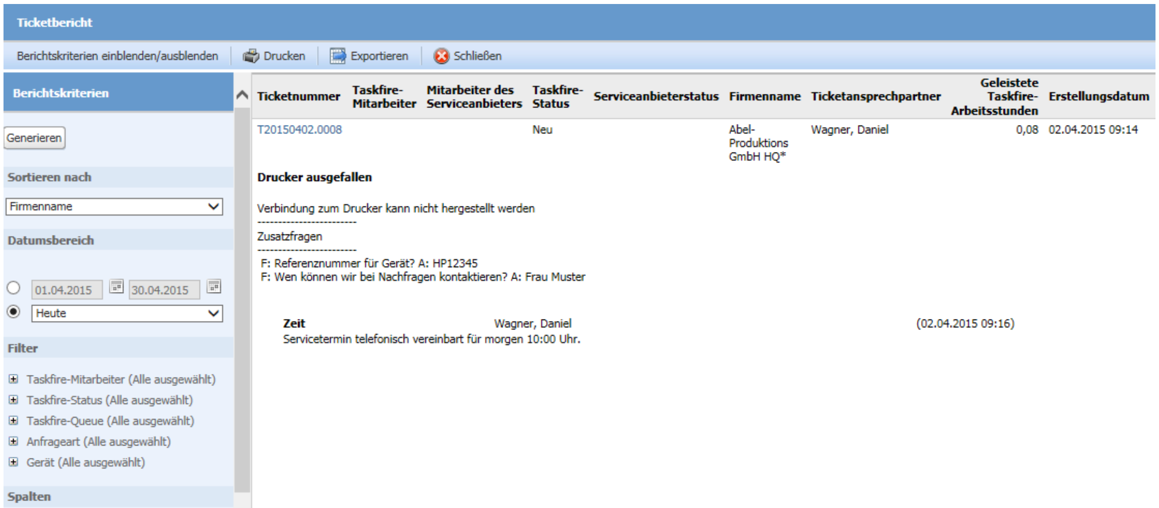
To run the Ticket report...

1. Click the Reports tab and select **Ticket Report** from the drop-down menu. The Report Criteria frame opens.
2. Select your **Sort By**, **Date Range**, **Filters**, and **Columns**.

   The Priority column (non-Taskfire clients) or Service Provider Priority column (Taskfire clients) are available only when your security level includes permission to view the service provider priority.

3. Click **Generate**. The report opens in a new window.





The Ticket Report does not include Ticket Notes.

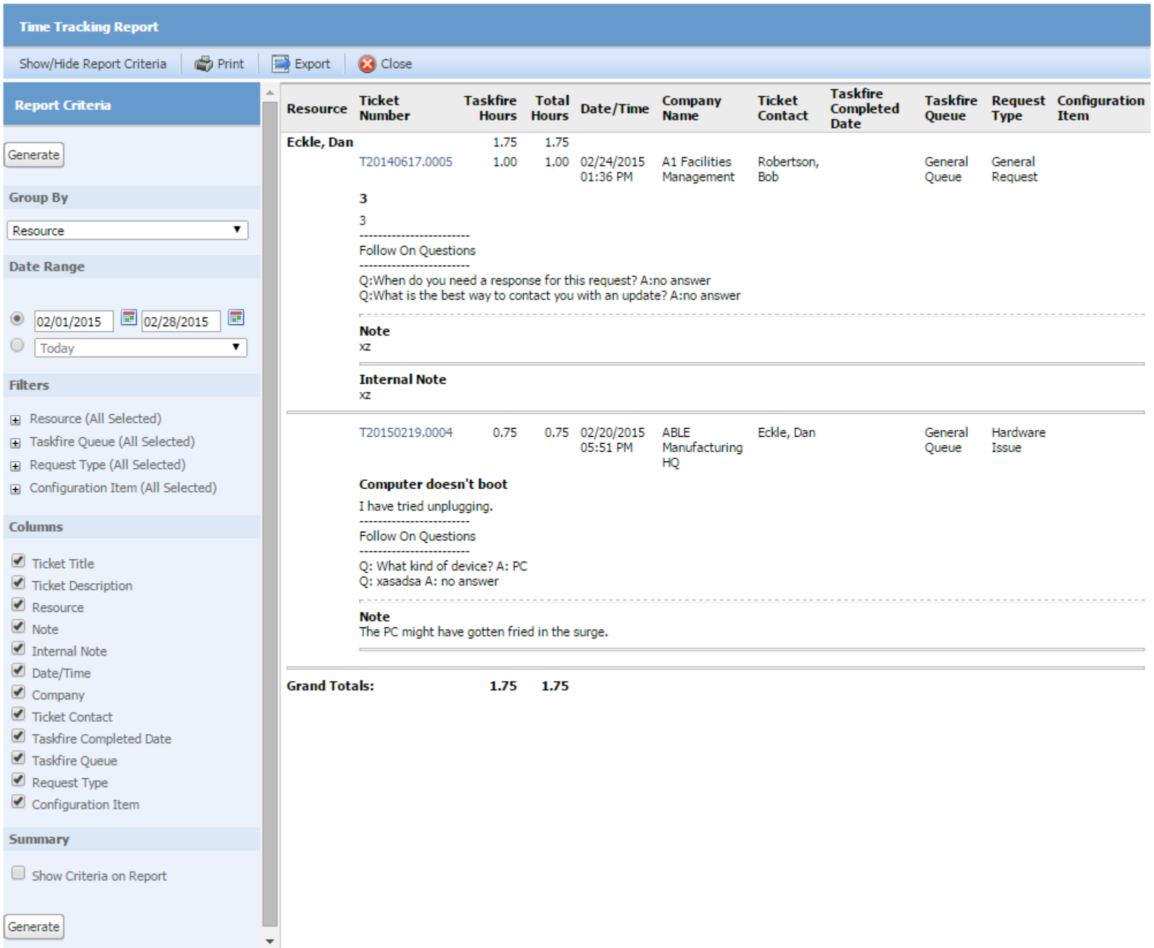
The Time Tracking Report

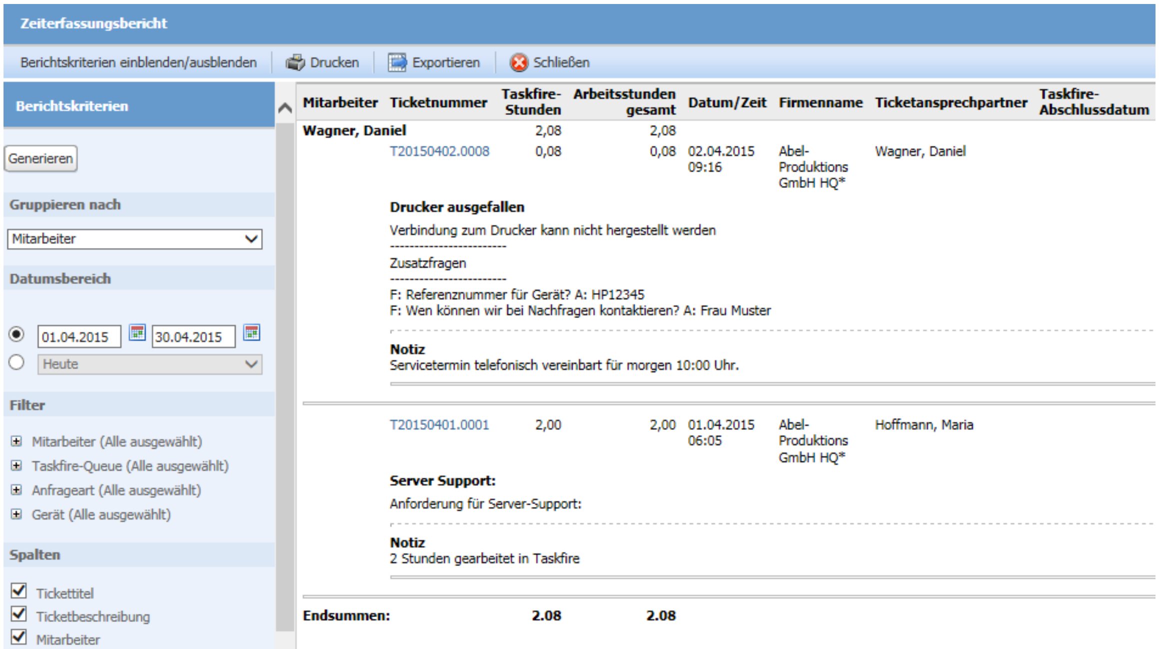
Any user who can see all tickets for their company can access this report.

Reports > Time Tracking

To run the Time Tracking report...

1. Click the Reports tab and select **Ticket Report** from the drop-down menu. The Report Criteria frame opens.
2. Select your **Group By**, **Date Range**, **Filters**, and **Columns** criteria.
3. Click **Generate**. The report opens in a new window.


Time Tracking Report
Show/Hide Report Criteria
Print
Export
Close
Report Criteria
Generate
Group By
Resource
Date Range
02/01/2015
02/28/2015
Today
Filters
Resource (All Selected)
Taskfire Queue (All Selected)
Request Type (All Selected)
Configuration Item (All Selected)
Columns
Ticket Title
Ticket Description
Resource
Note
Internal Note
Date/Time
Company
Ticket Contact
Taskfire Completed Date
Taskfire Queue
Request Type
Configuration Item
Summary
Show Criteria on Report
Generate
Resource
Ticket Number
Taskfire Hours
Total Hours
Date/Time
Company Name
Ticket Contact
Taskfire Completed Date
Taskfire Queue
Request Type
Configuration Item
Eckle, Dan 1.75 1.75
T20140617.0005 1.00 1.00 02/24/2015 01:36 PM A1 Facilities Management Robertson, Bob General Queue General Request
3
3
Follow On Questions
Q:When do you need a response for this request? A:no answer
Q:What is the best way to contact you with an update? A:no answer
Note
xz
Internal Note
xz
T20150219.0004 0.75 0.75 02/20/2015 05:51 PM ABLE Manufacturing HQ Eckle, Dan General Queue Hardware Issue
Computer doesn't boot
I have tried unplugging.
Follow On Questions
Q: What kind of device? A: PC
Q: xasadsa A: no answer
Note
The PC might have gotten fried in the surge.
Grand Totals: 1.75 1.75


Zeiterfassungsbericht
Berichtskriterien einblenden/ausblenden
Drucken
Exportieren
Schließen
Berichtskriterien
Generieren
Gruppieren nach
Mitarbeiter
Datumsbereich
01.04.2015
30.04.2015
Heute
Filter
Mitarbeiter (Alle ausgewählt)
Taskfire-Queue (Alle ausgewählt)
Anfrageart (Alle ausgewählt)
Gerät (Alle ausgewählt)
Spalten
Tickettitel
Ticketbeschreibung
Mitarbeiter
Mitarbeiter
Ticketnummer
Taskfire-Stunden
Arbeitsstunden gesamt
Datum/Zeit
Firmenname
Ticketansprechpartner
Taskfire-Abschlussdatum
Wagner, Daniel
2,08
2,08
T20150402.0008
0,08
0,08
02.04.2015 09:16
Abel-Produktions GmbH HQ*
Wagner, Daniel
Drucker ausgefallen
Verbindung zum Drucker kann nicht hergestellt werden
Zusatzfragen
F: Referenznummer für Gerät? A: HP12345
F: Wen können wir bei Nachfragen kontaktieren? A: Frau Muster
Notiz
Servicetermin telefonisch vereinbart für morgen 10:00 Uhr.
T20150401.0001
2,00
2,00
01.04.2015 06:05
Abel-Produktions GmbH HQ*
Hoffmann, Maria
Server Support:
Anforderung für Server-Support:
Notiz
2 Stunden gearbeitet in Taskfire
Endsummen:
2.08
2.08

Use the Knowledgebase

If the Knowledgebase is enabled for your Client Portal, all users can search it

Knowledgebase > Search Knowledgebase *or* Ticket View > Self Help

The fastest way to resolve many issues is when you find the answer you are looking for in the Knowledgebase.

If the Knowledgebase feature is enabled for your company, all Client Portal users in your organization will be able to search all articles in the Knowledgebase that are either marked public or that were published specifically to your company.

Users with a Taskfire security level can create and manage Knowledgebase articles for their organization. Refer to "Create and Manage Knowledgebase Articles" on page 96.

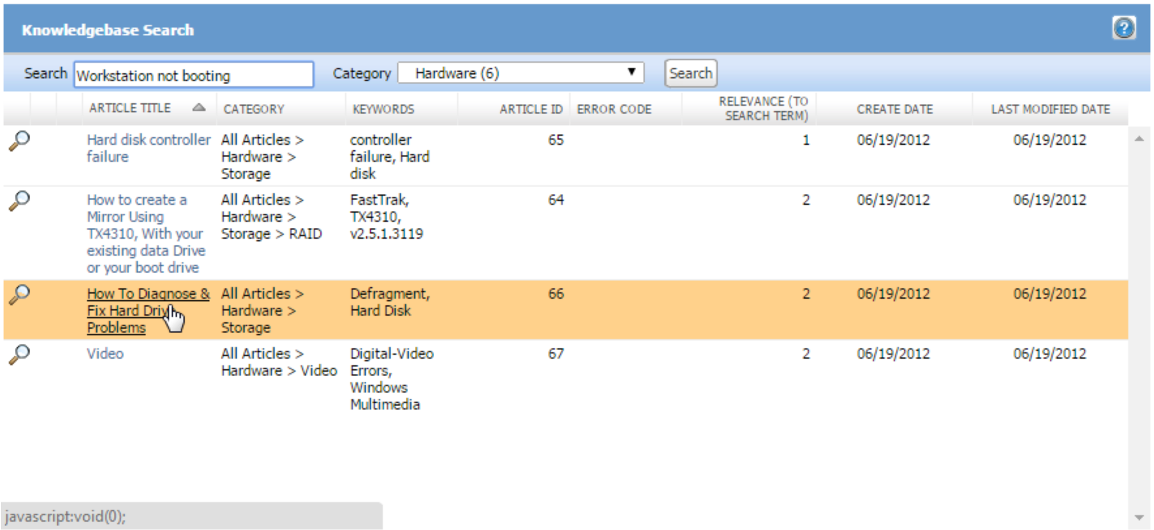
You can access the Knowledgebase in two ways.

How to...

Get self help on a ticket

1. When you create a new ticket or view an existing ticket, click **Self Help**.

   The Knowledgebase search page opens, with the title of the ticket automatically entered as the search term and the search already executed.

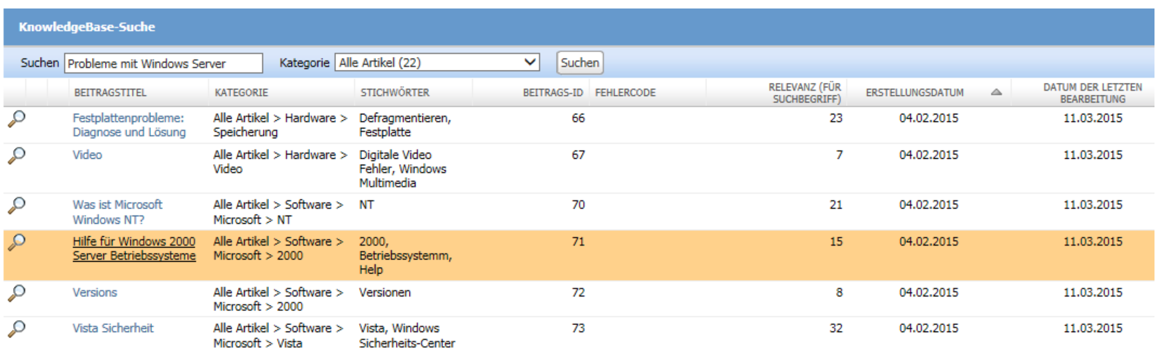


Knowledgebase Search

Search: Workstation not booting | Category: Hardware (6) | Search

ARTICLE TITLE	CATEGORY	KEYWORDS	ARTICLE ID	ERROR CODE	RELEVANCE (TO SEARCH TERM)	CREATE DATE	LAST MODIFIED DATE
Hard disk controller failure	All Articles > Hardware > Storage	controller failure, Hard disk	65		1	06/19/2012	06/19/2012
How to create a Mirror Using TX4310, With your existing data Drive or your boot drive	All Articles > Hardware > Storage > RAID	FastTrak, TX4310, v2.5.1.3119	64		2	06/19/2012	06/19/2012
How To Diagnose & Fix Hard Drive Problems	All Articles > Hardware > Storage	Defragment, Hard Disk	66		2	06/19/2012	06/19/2012
Video	All Articles > Hardware > Video	Digital-Video Errors, Windows Multimedia	67		2	06/19/2012	06/19/2012

javascript:void(0);



KnowledgeBase-Suche

Suchen: Probleme mit Windows Server | Kategorie: Alle Artikel (22) | Suchen

BEITRAGSTITEL	KATEGORIE	STICHWÖRTER	BEITRAGS-ID	FEHLERCODE	RELEVANZ (FÜR SUCHBEGRIFF)	ERSTELLUNGSDATUM	DATUM DER LETZTEN BEARBEITUNG
Festplattenprobleme: Diagnose und Lösung	Alle Artikel > Hardware > Speicherung	Defragmentieren, Festplatte	66		23	04.02.2015	11.03.2015
Video	Alle Artikel > Hardware > Video	Digitale Video Fehler, Windows Multimedia	67		7	04.02.2015	11.03.2015
Was ist Microsoft Windows NT?	Alle Artikel > Software > Microsoft > NT	NT	70		21	04.02.2015	11.03.2015
Hilfe für Windows 2000 Server Betriebssysteme	Alle Artikel > Software > Microsoft > 2000	2000, Betriebssystemm, Help	71		15	04.02.2015	11.03.2015
Versions	Alle Artikel > Software > Microsoft > 2000	Versionen	72		8	04.02.2015	11.03.2015
Vista Sicherheit	Alle Artikel > Software > Microsoft > Vista	Vista, Windows Sicherheits-Center	73		32	04.02.2015	11.03.2015

2. Optionally, you can change the search term and narrow the search by selecting a sub-category in the Category field.
3. Click **Search** again.

Search the Knowledgebase

1. Click the **Knowledgebase** tab in the Client Portal and select **Search Knowledgebase**.
2. Enter search terms in the **Search** box. Use quotes around words to find an exact phrase. Otherwise, the search will find any of the words you enter in the Search box. It will also find any variations that begin with the word.
3. To narrow your search, select a category from the **Category** menu. The search will return articles in the selected category only.
4. Click **Search**. All text and fields in Knowledgebase articles are searched.

5. To sort your results in ascending order by any column, click the **column header**. To sort in descending order, click the column header again.
6. **Open** an article by clicking the **title** or the **magnifying glass** icon.

Create and Manage Knowledgebase Articles

Users with a Taskfire security level

Knowledgebase > New Article

Taskfire users can create troubleshooting articles that might help other internal Client Portal and Taskfire users solve their own issues.

Taskfire users can:

- **Create** Knowledgebase articles.
- **Edit** Knowledgebase articles that were created within their organization and have not been edited by their Service Provider.
- **Delete** Knowledgebase articles they created and that have not been published to other customers of their Service Provider.

Taskfire Administrators can:

- Delete Knowledgebase articles that were created by any user in their organization and that have not been published to other customers of their Service Provider.

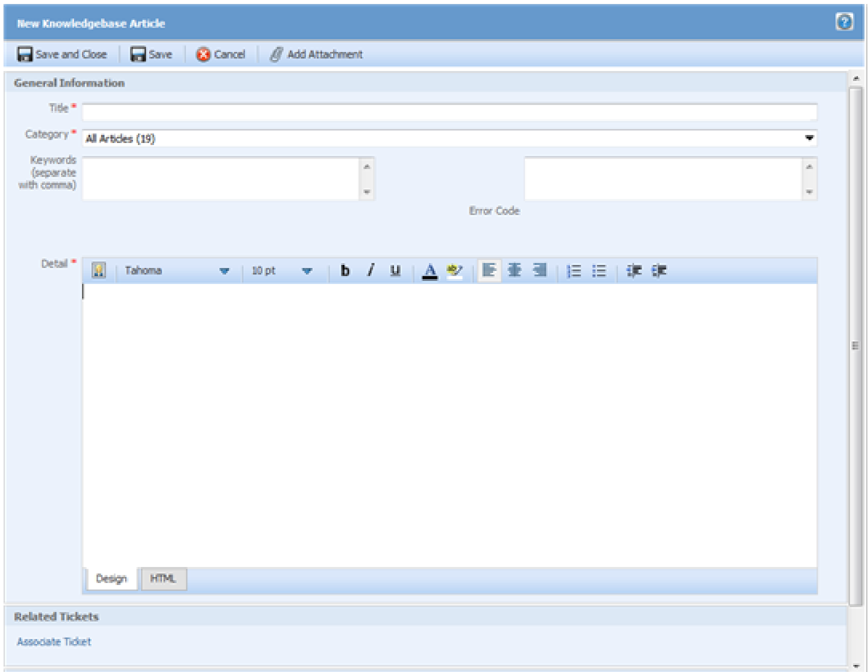
Taskfire users cannot edit or delete Knowledgebase articles that were created by their service provider, even if the article was created at their request or on their behalf.

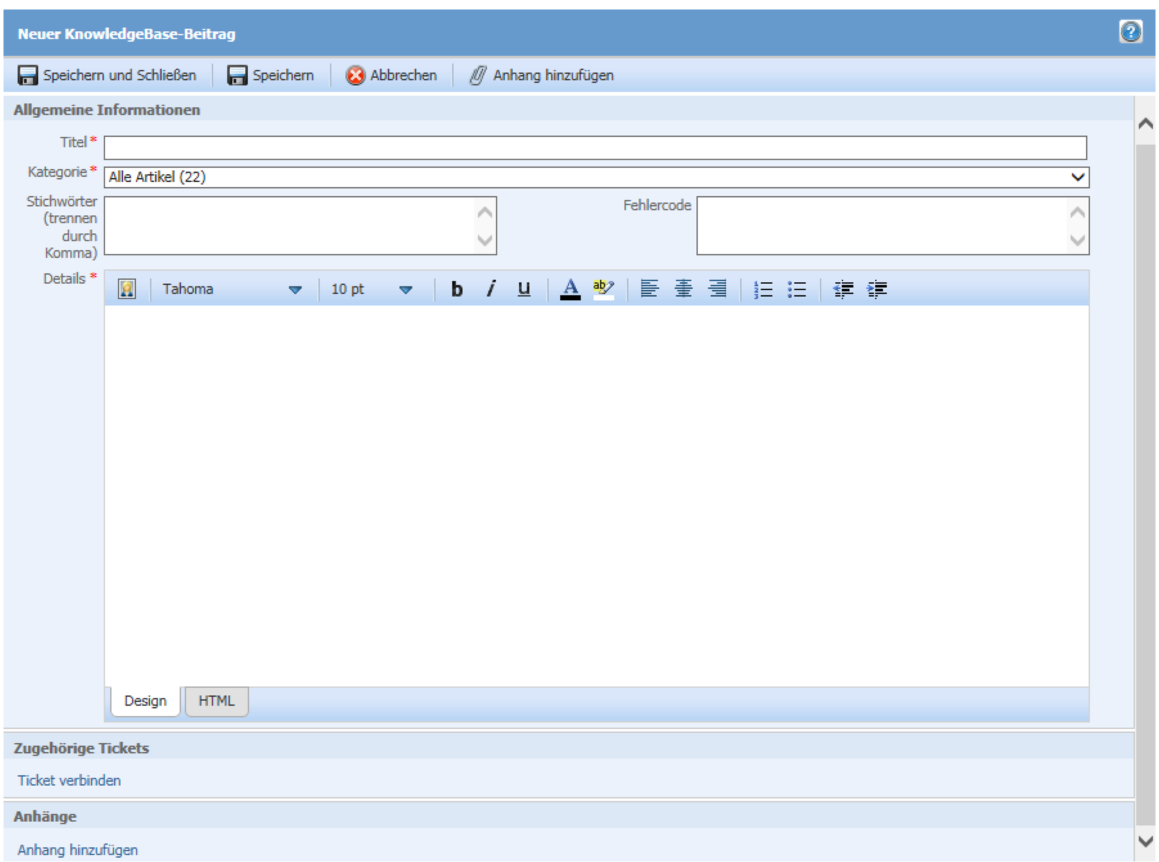
How to...

Create or edit a Knowledgebase article

1. On the **Knowledgebase** tab, select **New Article** or, from the **Knowledgebase Search** page, click **New Article** at the top. To edit an article, click the pencil icon on the article list.

   The **New or Edit Knowledgebase Article** page opens.


New Knowledgebase Article
Save and Close
Save
Cancel
Add Attachment
General Information
Title *
Category *
All Articles (19)
Keywords (separate with comma)
Error Code
Detail *
Tahoma
10 pt
Design
HTML
Related Tickets
Associate Ticket


Neuer KnowledgeBase-Beitrag
Speichern und Schließen
Speichern
Abbrechen
Anhang hinzufügen
Allgemeine Informationen
Titel *
Kategorie *
Alle Artikel (22)
Stichwörter (trennen durch Komma)
Fehlercode
Details *
Tahoma
10 pt
Design
HTML
Zugehörige Tickets
Ticket verbinden
Anhänge
Anhang hinzufügen

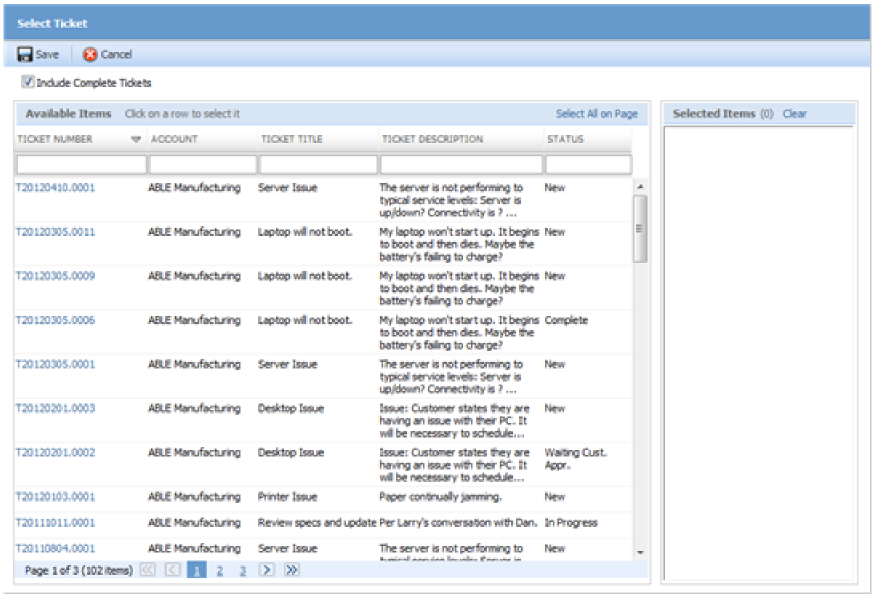
2. Enter information as follows:

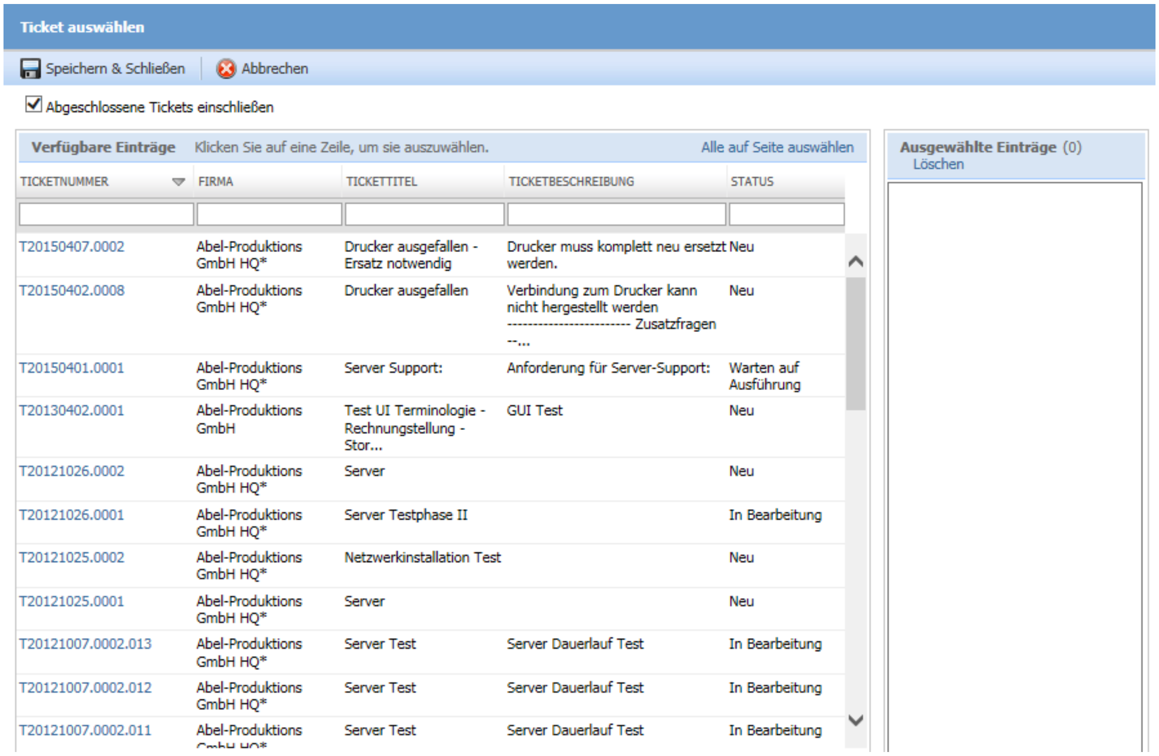
Field	Definition
Add Attachment	Click to open the Add Attachment dialog. If the article hasn't been saved, you will be prompted to save it. For details on adding an attachment, refer to "Add Attachments" on page 63.
Title	Enter a descriptive title for the article. The title is required but does not have to be unique.
Category	Select the "category > subcategory..." with which you'd like to classify the article.
Keywords	Enter keywords for this article. Keyword is one of the fields searched in a Knowledgebase Search. Keyword search is a single word search. Separate multiple keywords with a comma. If you want to use a two-word phrase as a keyword, do not use spaces between the words. For example, if you want to use "hard drive" as a keyword, enter "harddrive" into the field.
Error Code	You can enter an error code for this article. Error code is one of the fields searched in a Knowledgebase Search.
Detail	Enter the body of your article into the **Detail** field using the WYSIWYG editor. The icons and tools in the editor are similar to Microsoft Word tools and icons. The default **Design** view (selected below the text field) allows you to write and format your own content directly in the text field or paste formatted text from another document. You can click the picture icon to insert an image. Select **HTML** below the text field to view or edit the HTML markup or enter text and HTML markup directly. Alternately, use an external HTML editor and cut and paste HTML content into the HTML view of the text field. Select the **Preview** option to see how your article will appear to Knowledgebase users.
Associate Ticket	Click this link to open the **Select Ticket** page. See "Associate tickets with a Knowledgebase article" on page 98, below.

3. Click **Save and Close**.

Associate tickets with a Knowledgebase article

1. On the **New Knowledgebase Article** page, select **Associate Ticket**.
2. The **Select Ticket** page opens:





3. Check the Include **Complete Tickets** check box to list tickets that have been resolved.
4. Narrow your search by entering search criteria in any of the fields at the top of the page.
5. To view the ticket detail and add it to your selections, click the ticket number link.

6. Select an individual ticket by clicking on it, or select all displayed tickets by clicking the **Select All on Page** link. Your selections will appear in the list on the left. To remove all selected tickets from that list, click the **Clear** link.
7. Click **Save & Close** to save your selections and return to the Knowledgebase Article page.

Delete a Knowledgebase article

1. Locate the article you wish to delete. See "Use the Knowledgebase" on page 94 for more information.
2. Either click the **Delete** icon and confirm the deletion OR open the article and click the **Delete** button.
3. Confirm the deletion.

You may not delete articles that we, your service provider, have created for you.

Monitor End Client Tickets and Projects

Client Portal users at Autotask customers that have been selected as "Company to bill" on one or more contracts

Tickets > End Client Tickets

Projects > End Client Projects

If your company is a customer or partner of our company, and we are billing you for work we did for one of *your* customers (the end client, whom you will bill directly), you can use your Client Portal to view tickets and projects that contain billing items we are billing to you. This allows you to track the work we are doing for your customer.

End client tickets and projects are not mixed in with the tickets and projects we do for your company. They are accessed from separate pages that display only tickets or projects that include work done for another company where your company is the designated Company to bill. The Ticket Search will not return any end client tickets, and no end client data will appear in reports. You do however have access to the Knowledgebase from end client tickets.

For more information, refer to:

- "End Client Tickets" on page 101
- "End Client Projects" on page 103

End Client Tickets

Client Portal users at Autotask customers that have been selected as "Company to bill" on one or more contracts

Tickets > End Client Tickets

The End Client Tickets page displays a list of all tickets for which your company is the designated "Company to bill." It allows you to view information about tickets where we do work for one of your clients, but invoices are sent to your company. The page is only available to Client Portal users from Autotask customers that have been selected as "Company to bill" on one or more contracts.

Tickets appear on this page if:

- The ticket is associated with a contract where your company is the "Company to bill"
- One or more time entries on the ticket are associated with a contract where your company is the "Company to bill"

The End Client Tickets list displays general information about each ticket.

- All dates and times on the list display in your company's time zone. Dates without times display in Eastern Standard time.
- End client ticket information is read-only. You cannot add or edit notes or attachments. You can print any list that displays a Print button. You can click the ticket contact name to email the contact. An email message form opens in your default email application.

On this page, you can do the following:

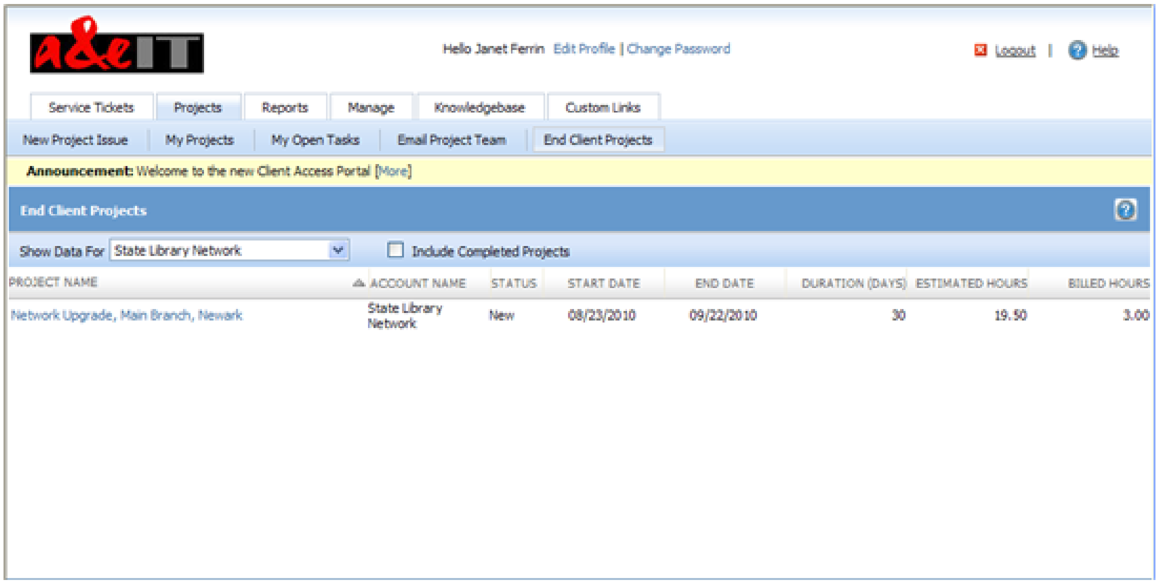
Option	Description
Export	Click the Export button to export the contents of the ticket list to CSV, Excel, or PDF.
Include Completed Tickets	By default, the list does not display tickets with a status of Complete. To display tickets with a Complete status, click to select this check box. To hide completed tickets, click to clear the check box.
Column Filters	A column filter appears at the top of each column below the column heading. You can search by any column. Simply begin to type the first few characters of the data you are searching for in the appropriate column filter. The search will begin shortly after you stop typing, allowing you to enter as few or as many characters as you wish. The more characters you enter, the more precise the search. For example, to filter by client, begin to type the client name in the client filter field. All filters except for the date filters are "starts with" filters. That is, if you type A, the list will include all clients with names that start with A; if you type Acme, the list will include only clients with Acme as the first word in the name. For date fields, you must enter a complete date or select a date from the date picker. The date filters return only exact matches. You can search by multiple columns at once. For example, once you search by client name Acme, you can then search the Acme client tickets by another filter.
Ticket Number link	Click the ticket number to open the ticket detail page in another window. The ticket detail displays general ticket information including the company name, create date, status, ticket contact, the internal resource (if assigned) and the due date. You can also see the description and a work history including attachments. The Work History displays only information related to the ticket items for which your company can be billed. Hours worked are not displayed until we approve and post the time entry. For additional information on the ticket detail window, refer to "View a Ticket" on page 56.

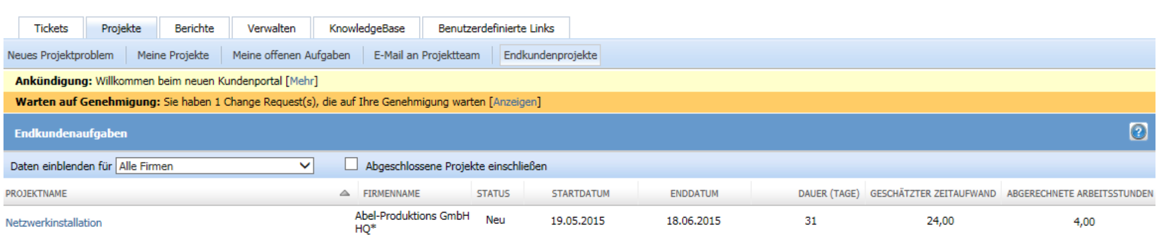
End Client Projects

Client Portal users at Autotask customers that have been selected as "Company to bill" on one or more contracts

Projects > End Client Projects

The End Client Projects page displays a list of all projects for which your company is the designated "Company to bill." It allows you to view information about projects where we do work for one of your clients, but invoices are sent to your company. The page is only available to Client Portal users from Autotask customers that have been selected as "Company to bill" on one or more contracts.





- The grid columns include high-level project information. In addition, Billed Hours are displayed to all your Client Portal users, even if they cannot access Billed Hours on other pages.
- All dates and times on the list display in your company's time zone. Dates without times display in Eastern Standard time.

- End client project information is read-only. You cannot add or edit notes, attachments, or issues. You can print any list that displays a Print button. You can email all project team members, but only from the Project Summary page.

On this page, you can do the following:

Option	Description
Show Data for	By default, the list displays all clients which have projects that designate your company as the Company to bill. Click the dropdown to select a specific client. Only clients who have projects with contracts where you are the Company to bill appear on the list.
Include Completed Projects	Click this check box to include projects with a status of Complete.
View a Project	Click on a project to open it. The features available on the Project Summary page will vary depending on your assigned Client Portal security level, and the content is limited to items associated with tasks and charges for which your company is the Company to bill. For an overview of project pages, refer to "View a Project" on page 74.

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