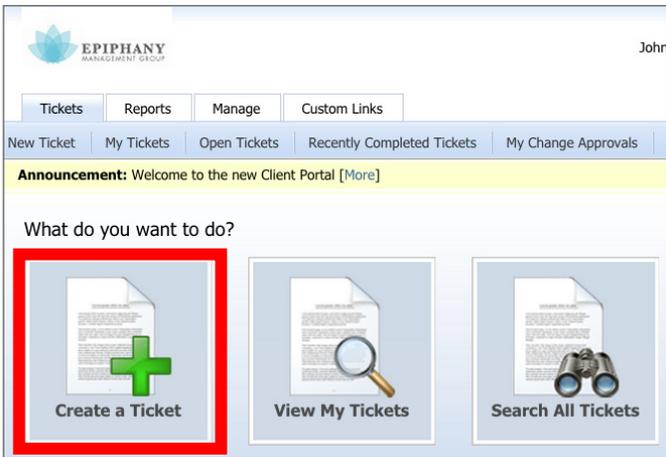


Creating a Ticket using the Autotask Portal

Step 1: Make sure pop-ups are allowed for the Autotask portal.

Step 2: Click "Create a Ticket" on the portal home page.



Step 3: Choose your specific building under "Account." Leaving the account as the school district may result in a delayed response to your ticket.

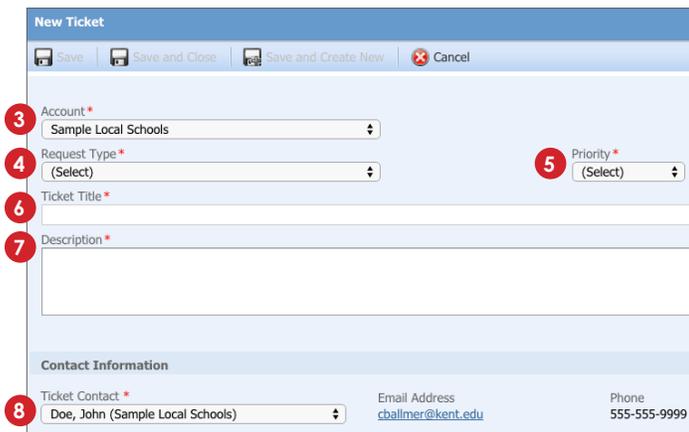
Step 4: Choose the "Request Type" that best describes your issue. The most common issues are located at the top of the list.

Step 5: Choose the "Priority" that best describes the urgency of your issue.

Step 6: Write a descriptive "Ticket Title," making it as unique as possible so our technicians can gain an understanding of the issue at a glance.

Step 7: Add as much additional information as possible under "Description."

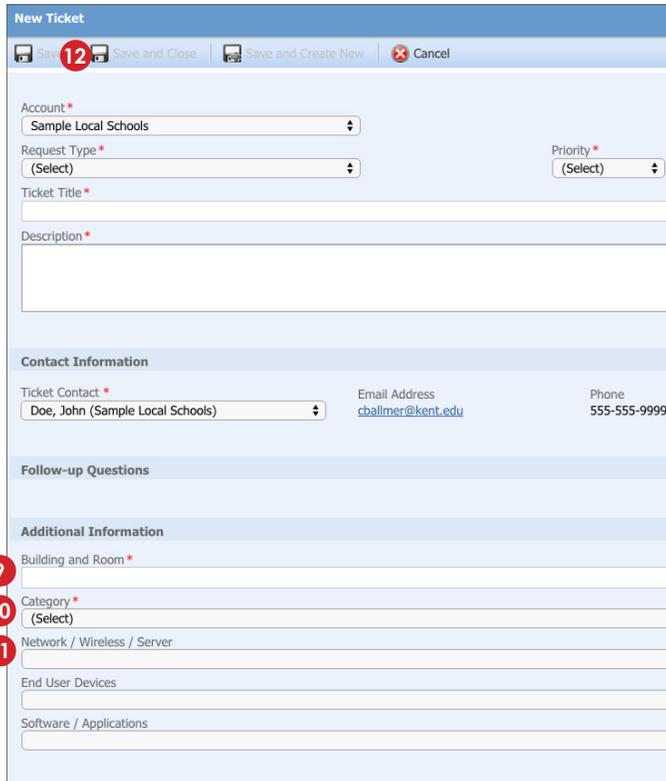
Step 8: Check that the contact information is correct.



The screenshot shows the 'New Ticket' form. At the top, there are buttons for 'Save', 'Save and Close', 'Save and Create New', and 'Cancel'. The form fields are as follows:

- 3** Account: A dropdown menu with 'Sample Local Schools' selected.
- 4** Request Type: A dropdown menu with '(Select)' selected.
- 5** Priority: A dropdown menu with '(Select)' selected.
- 6** Ticket Title: A text input field.
- 7** Description: A large text area for entering details.
- 8** Contact Information: A section containing:
 - Ticket Contact: A dropdown menu with 'Doe, John (Sample Local Schools)' selected.
 - Email Address: 'cballmer@kent.edu'
 - Phone: '555-555-9999'

Creating a Ticket using the Autotask Portal



The screenshot shows the 'New Ticket' form in the Autotask portal. At the top, there are buttons for 'Save and Close' (with a red circle 12), 'Save and Create New', and 'Cancel'. The form fields include:

- Account ***: A dropdown menu with 'Sample Local Schools' selected.
- Request Type ***: A dropdown menu with '(Select)' selected.
- Priority ***: A dropdown menu with '(Select)' selected.
- Ticket Title ***: A text input field.
- Description ***: A large text area.
- Contact Information**: A section containing:
 - Ticket Contact ***: A dropdown menu with 'Doe, John (Sample Local Schools)' selected.
 - Email Address**: 'cballmer@kent.edu'
 - Phone**: '555-555-9999'
- Follow-up Questions**: A section with a text area.
- Additional Information**: A section with three dropdown menus:
 - Building and Room ***: A dropdown menu with a red circle 9 next to it.
 - Category ***: A dropdown menu with '(Select)' selected and a red circle 10 next to it.
 - Network / Wireless / Server**: A dropdown menu with a red circle 11 next to it.
- End User Devices**: A text area.
- Software / Applications**: A text area.

Step 9: Enter your building and room number/name under "Building and Room."

Step 10: Choose the appropriate category for your ticket under "Category."

- **New Hardware / Software:** You need hardware (e.g., wireless card) or software installed.
- **Network / Wireless / Server:** You are having internet issues.
- **End User Devices:** You are having issues with computers, printers, iPads, etc.
- **Software / Applications:** You are having issues with specific software or applications (e.g., your gradebook).
- **Epiphany Internal:** DO NOT USE.

Step 11: Choose a sub-category from one of the above three drop-down menus. Choose the drop-down menu that corresponds with the category you chose above.

Step 12: Click "Save and Close" at the top of the screen.

NOTE: Epiphany is always available to help you. Please email questions to autotask@epiphanymgmt.com