



we can solve it.

ATS CLIENT PORTAL INTRODUCTION

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WELCOME

Congratulations, and welcome to the ATS Client Portal!

This document will help you get familiar with the portal including where it is located, your login credentials, and how to use the portal. The portal will enable you to create new service requests, monitor the status of current requests, and many other functions.

BASIC OVERVIEW

The following section will show you how to log into and out of the portal, and how to change your personal user settings.

Login Credentials

Username: Email address

Password: Your first name (all lower-case)

Logging into the Portal

Navigate to <http://www.atsol.org/support>

1. Enter your **email address** and **password**
NOTE: Please customize your password immediately after your initial login
2. Click **Login**
3. You are taken to the Client Portal homepage (shown below). If you encounter a 'Website security certificate' warning, do not worry - just select **Continue to this website**.



Logging Out of the Portal

When you are finished using the client portal, click the **Log Out** link on the top, right-hand corner of the screen.

Changing Your Settings

You can change your settings by clicking the **My Account** link located at the top, right-hand corner of the screen. Here is where you can edit your account details such as name, security level, email address, password and others. At least one person has been setup as your administrator to help manage your internal team. This person can determine who can access the portal and with what access/security rights. ATS can also add and manage accounts for your team.



Access Levels

Access to features of the portal varies depending on your access level. For information about changing yours or another person's security level, see the [Account Tab - User Screen](#) section of this document. The grid below shows which users have which capabilities.

Description of Permission	Security Level					
	User	Super User	Project Manager	Finance	General Manager	Admin
Access all Opportunities (instead of just mine)					★	★
Access all Tickets (instead of just mine)		★	★	★	★	★
Access Reports			★	★	★	★
Approve Tickets		★	★	★	★	★
Change Contact on Tickets			★	★	★	★
Enter New Tickets	★	★	★	★	★	★
Maintain Company Preferences				★	★	★
Maintain Members (Contacts for Company)				★	★	★
Update Tickets	★	★	★	★	★	★
View Agreements				★	★	★
View Configurations						★
View Opportunities	★	★	★	★	★	★
View Projects	★	★	★	★	★	★
View/Print Customer Signoff Form				★	★	★
View/Print Invoices				★		★

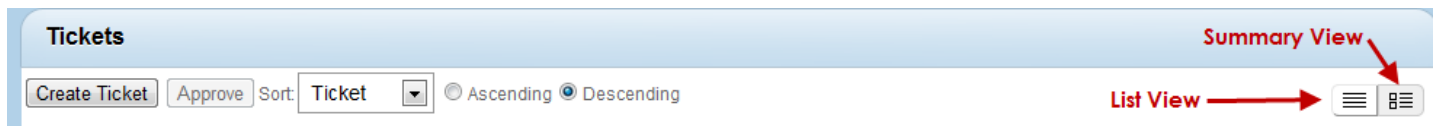
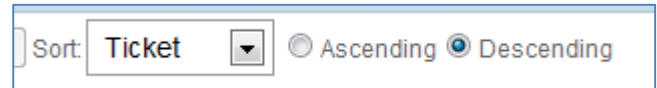


NAVIGATING THE PORTAL

This section will show you how to create a ticket using the **Create Ticket** button and how to use each of the seven tabs available to you in the portal:

- Tickets
- Knowledge Base
- Reports
- Projects
- Configurations
- Account
- Recommendations

Most of the tabs will have a **Sort** menu that will enable you to filter and narrow down your searches. Additionally, there will usually be a **Summary View** and a **List View** available. A Summary View will provide you with more Summary details about the item, while the List View condenses the details into one row.



Creating a Ticket

Use the **Create Ticket** button at the upper, right-hand corner to enter a new service request. When you create a new service ticket your name, address, telephone number and email will automatically populate on the ticket. After completing the required fields and clicking **Submit**, you will receive a confirmation email with your ticket number.



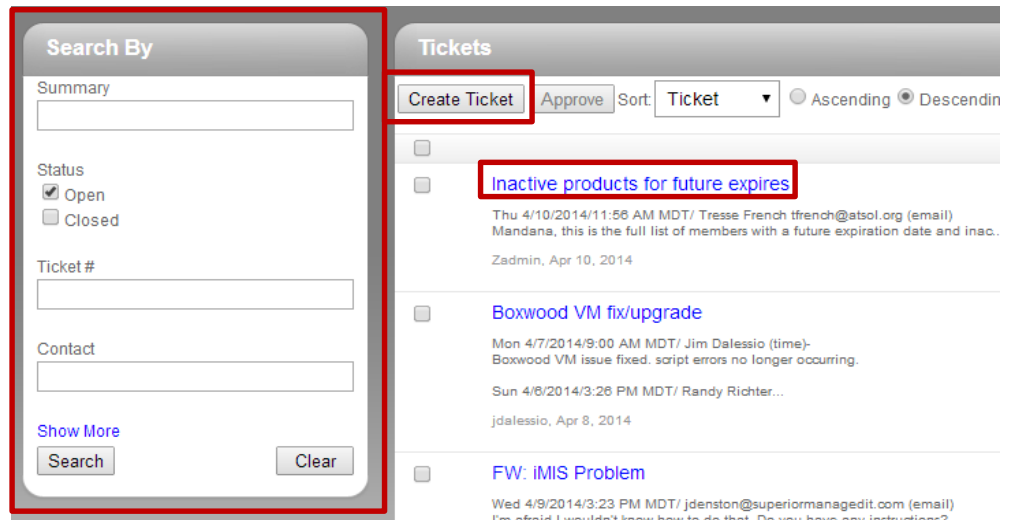
The following is a list of the fields used when creating a new ticket:

Select Service Needed	Use the carousel to select the type of Service Request to enter.
Title	Enter a summary description of the request or issue
Problem Description	Enter a complete description of the issue or request. Please be sure to include as much detail as possible. If you are submitting a technical support request or problem, make sure that you give us enough information to be able to replicate the issue. This information may include usernames, passwords, web addresses (URLs), error messages, or other information.
Attach Document	Click the Attach Document link to reveal a Choose File button. Include any additional documents as necessary for us to be able to evaluate and replicate the request. Common files uploaded include screenshots, design graphics, Microsoft Word and Excel documents, and others.
Due Date	Enter the date by which you would like the service ticket to be completed.
Emergency	Select this check box if the service request is an emergency. This should only be used if the issue is related to a production system/application and severity & impact is extremely high.
PO Number	If applicable enter a Purchase Order number to authorize the billing of this service ticket.
Contact Details	Your information should be pre-populated. If you would like to designate a different Contact for the request then click the Choose button to select a different person from your team.

Tickets Tab

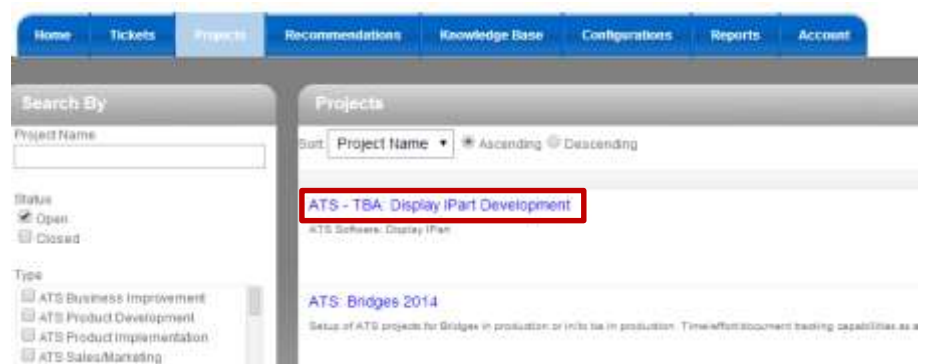
The **Tickets** tab enables you to view all service tickets for your company. Certain security levels may be necessary in order to view all valid service tickets. In this screen you are able to:

1. Open a new service request by selecting the **Create Ticket** button.
2. Use the **Search by** section to assist in filtering results.
3. Click the **Summary** link to review the ticket details or contribute additional information



Projects Tab

The **Projects** tab enables you to see all projects for your company. Depending on your security level, you may only be able to view your records. However, certain security levels have the ability to view all valid projects for your organization. To view information about a project, click on the **Project Name**. The **Work Plan** will then display where you can select individual project tickets to view or update information.

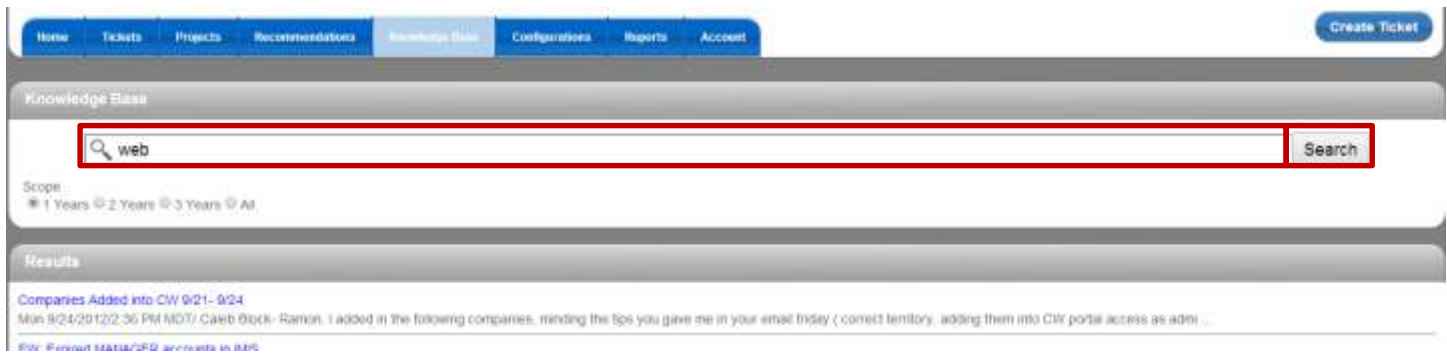


Recommendations Tab (not currently in use)

The **Recommendations** tab enables you to display recommendations that have been sent to the portal for review. Recommendations originate within the ticketing system and are sent to the portal for client review. Consider thinking of recommendations as quotes. If an ATS employee creates an Opportunity and places it in a status that is visible on the Client Portal, you can use the Recommendations tab to review that Opportunity. To review, accept or reject a recommendation, click on the summary link to open it.

Knowledge Base Tab

The **Knowledge Base** tab enables you to search all service entries in the ticketing system. Enter keywords or phrases into the **Describe Your Problem...** box, select a **Scope** (time period), and click **Search** to view the results.



Configurations Tab (not currently in use)

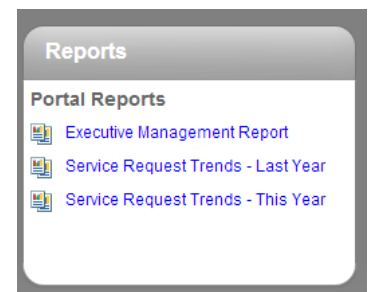
The **Configurations** tab will show the list of devices and configurations associated with your organization. You can use the **Search By** area to filter and narrow down the configurations you are looking for. ATS is currently not using this functionality.

Reports Tab

The reports you are able to view on the **Reports** tab depends on your security level. Users with a security level of **Administrator** can view all available reports.

There are three **Portal Reports** available by default:

- Service Request Trends This Year
- Service Request Trends Last Year
- Executive Management Report



Account Tab

In the **Account** tab you can view **Invoices**, **Users**, and **Agreements** for your organization.

INVOICES SCREEN

The **Invoices** screen displays all available invoices. Selecting the invoice number link will open the invoice for you to review. Payment via the portal is currently not configured for ATS clients.

USERS SCREEN

The **Users** screen enables you to update the name, security level, email address, password, phone numbers, and other information for individual users in your organization. The ability to view the list of users and edit their information depends on your security level ("Finance" level and above). To request a higher security level, contact your organization's administrator, or submit a ticket to us.

AGREEMENTS SCREEN

The **Agreements** screen enables you to view all active agreements for your organization.

ONGOING SUPPORT

Service or Project Service Requests/Tickets

PORTAL

Please use the portal as the primary communication tool with ATS: <http://www.atsol.org/support>

EMAIL

As an alternative, you can email a help desk request directly to: help@atsol.org

CALL

If these options are not available to you, please feel free to call ATS directly at: 720-945-7252

Trouble accessing or using the ATS Client Portal?

If you are having trouble accessing or using the ATS Client portal you can contact the following people for assistance.

Name	Title	Direct Phone	Email
Jake Robida	Technical Support Specialist	(720) 235 - 4410	jrobida@atsol.org
Jim Dalessio	Integration Specialist	(720) 235 - 4408	jdalessio@atsol.org
Tresse French	Technical Support Analyst	(571) 293 - 0827	tfrench@atsol.org
Laura Tidquist	Technical Support Manager	(720) 945 - 7255	ltidquist@atsol.org