



# WEBINAR SERIES

## Help Us Help You

How to Maximize the Value of Your Support Requests

Presented by:

Association Technology Solutions





# About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- 2015 & 2016 Authorized iMIS Solution Provider (AiSP) of the Year
- ASAE-Approved CAE Provider



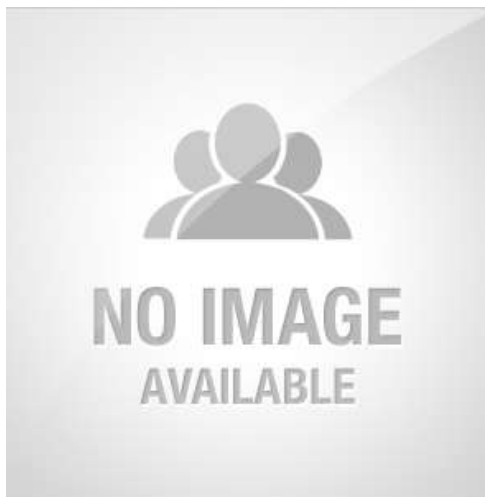


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*Presenter:*

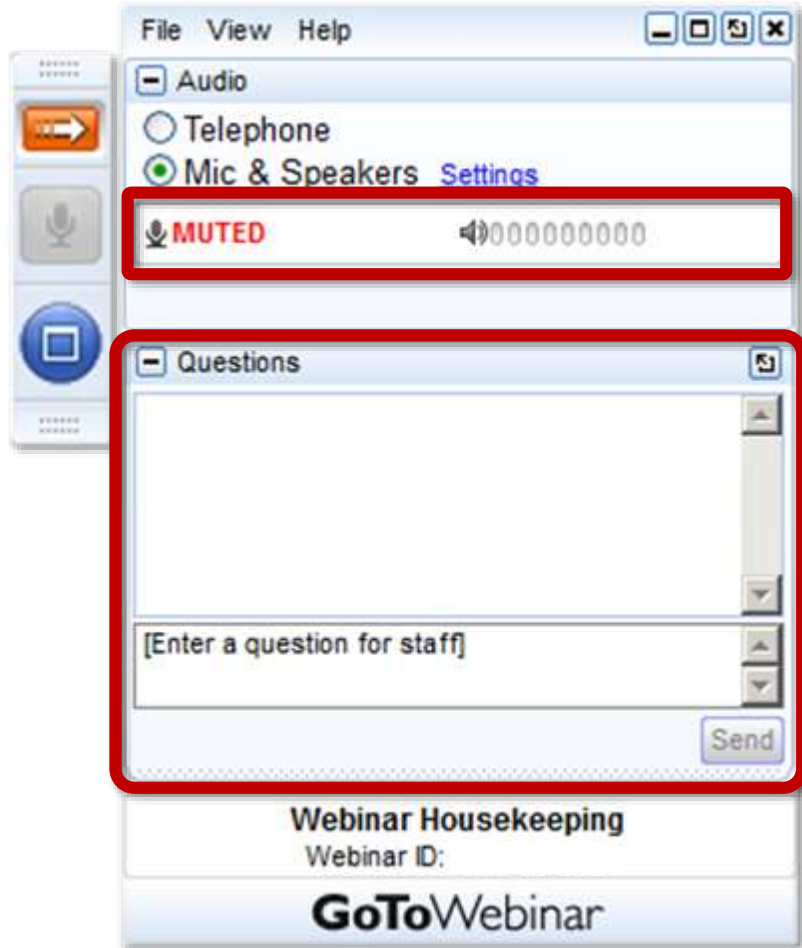
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- Attendees are muted to reduce background noise
- Remember to ask questions via the **Questions** panel
- Questions will be answered during Q&A after presentation is complete



# About Me



- With ATS since 2014
- Background in website management and support
- RiSE implementation, training, support
- ATS product implementation and support



- Our support processes
- Things you can do before submitting ticket
- Things you can do to ensure that we're able to help you more quickly and efficiently
- Some of the most common requests we receive



# Support Processes

## Dispatch

- Reviewed as received
- Ticket type determination
- Evaluated for urgency, impact
  - Time-sensitivity
  - Financial consequence
  - Severity of issue
  - Scope of impact
- Assigned to support member typically within 30-60 minutes during business hours



Dispatch



```
graph TD; Dispatch[Dispatch] --> Service[Service];
```

Service

- Generally quick resolution
- Errors/problems
- Misbehavior
- Basic settings/config





# Support Processes

Dispatch

Service

Consulting

- Generally longer resolution
- Short implementations of software
- Require analyst, consultant, or developer to identify best solution
- Quotes/RFPs
- Scheduled work



Service

- Initial response dependent on criticality of request

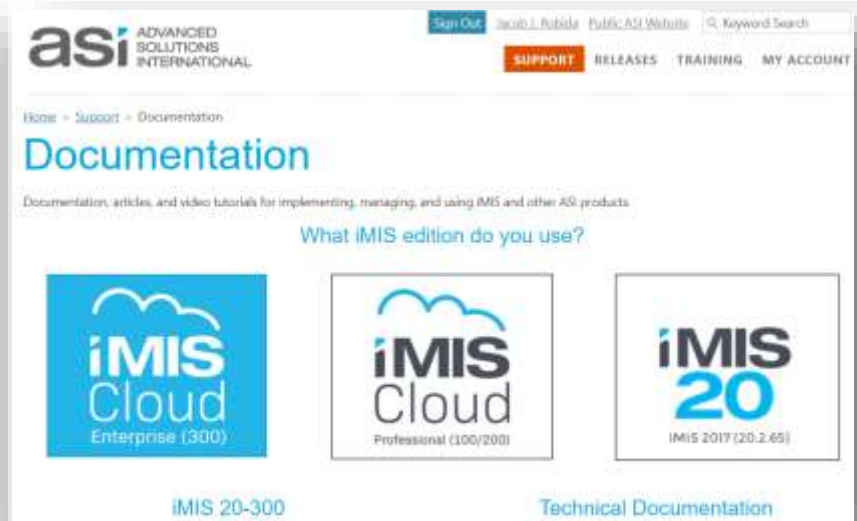
Consulting

- Billing
  - Rates
  - Invoiced at beginning of month



# Before Submitting Tickets

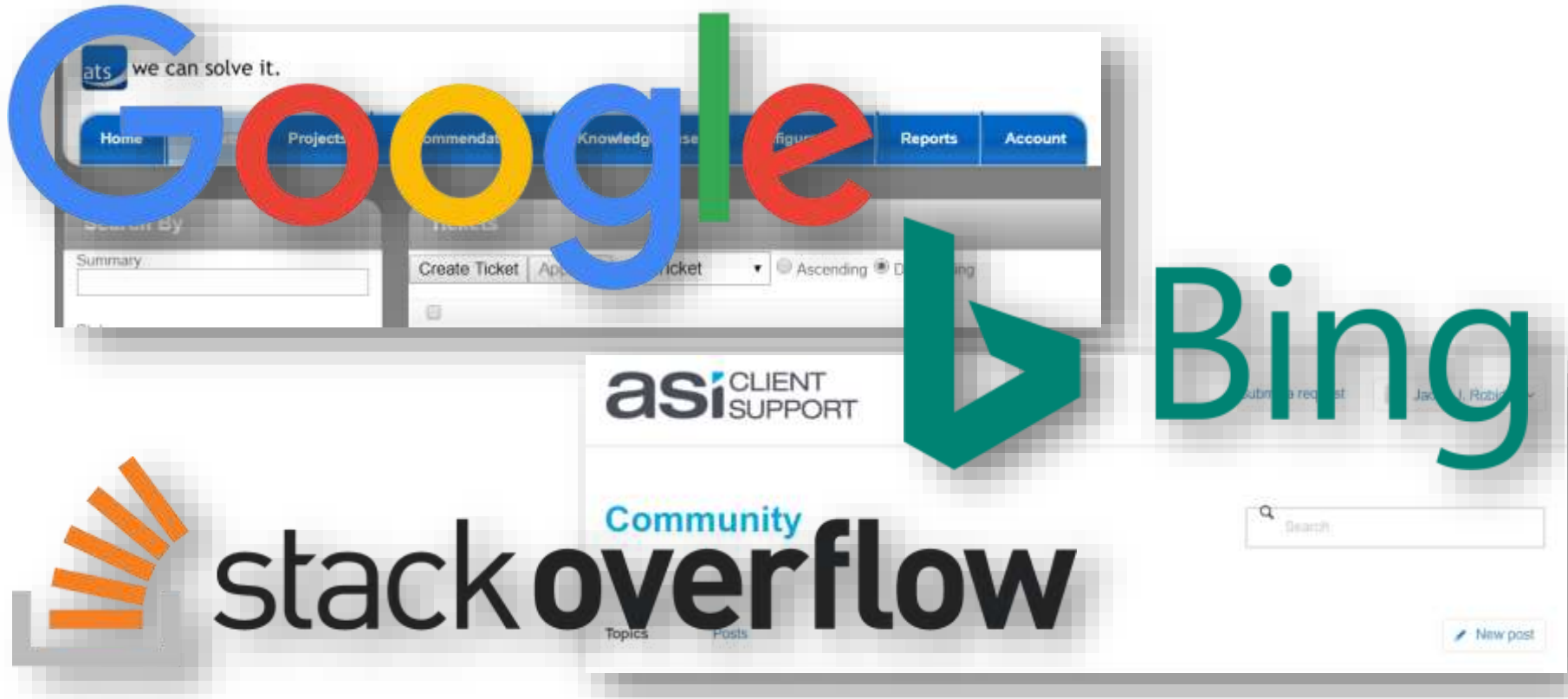
- Documentation
  - ATS documentation: <https://atsol.org/OMDocs>, Word/PDF files
  - ASI: <https://help.imis.com>
  - Third-party product websites





# Before Submitting Tickets

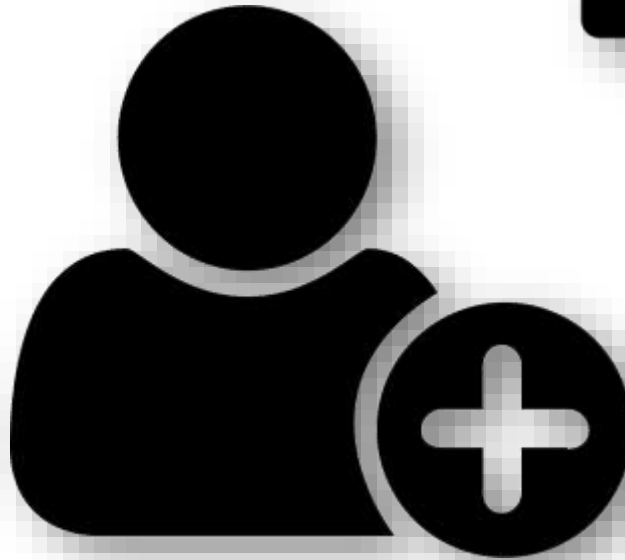
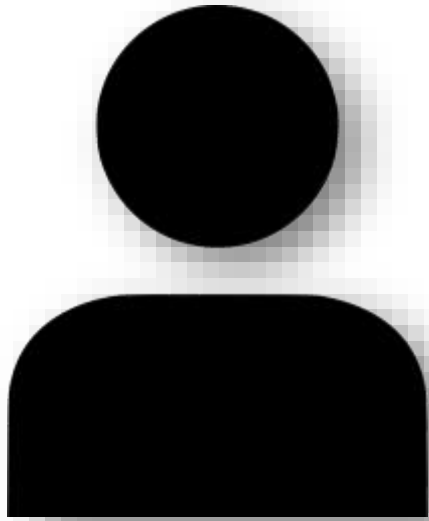
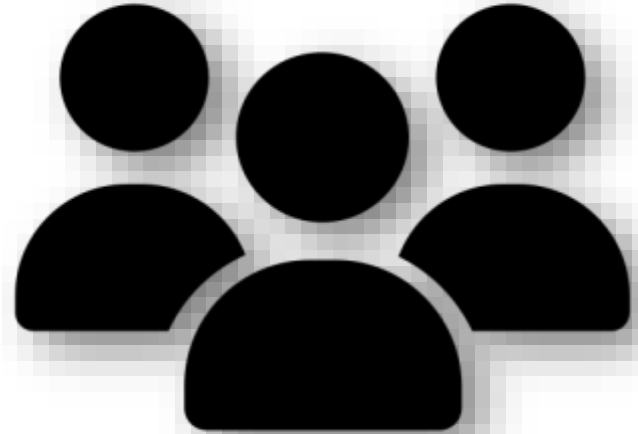
- Search
  - Ticket/support systems (ATS, ASI)
  - Google, Bing, StackOverflow, etc.



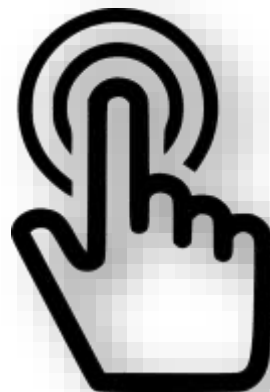
- Other Resources
  - ASI Support – <https://support.imis.com> (pros, cons)
  - ASI Training - <https://www.advsol.com/training>
  - NiUG Community – <https://niug.org>

The screenshot displays the NiUG member community website. The header includes the 'asi CLIENT SUPPORT' and 'asi ADVANCED SOLUTIONS INTERNATIONAL' logos on the left, and the 'NiUG member COMMUNITY' logo in the center. A navigation bar at the top right contains links for 'NIUG HOME PAGE', 'ABOUT NIUG', 'MEMBERSHIP', 'RESOURCES', 'EVENTS', and 'CHAPTERS'. Below the navigation bar, there are several sections: 'Welcome to the Community!' with a list of tips for new members, 'Recent Activity' showing recent posts, 'Community News' with a link to recent blog articles, and 'Getting Started' with instructions for new users. A 'Tweets' section shows a tweet from NiUG International about a free webinar alert. On the right side, there is a 'Follow us' section with social media icons for Facebook, LinkedIn, and YouTube.

- Who is affected? (urgency, impact)
  - All users including staff, members, etc.
  - Specific groups of users
  - Single users



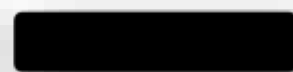
- Is it replicable?
  - Use-cases, steps to replicate
  - Test on multiple workstations
  - Try another browser
  - Clear cache and cookies



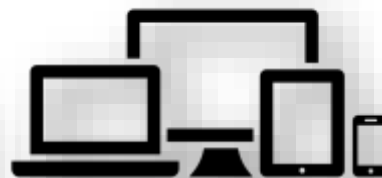
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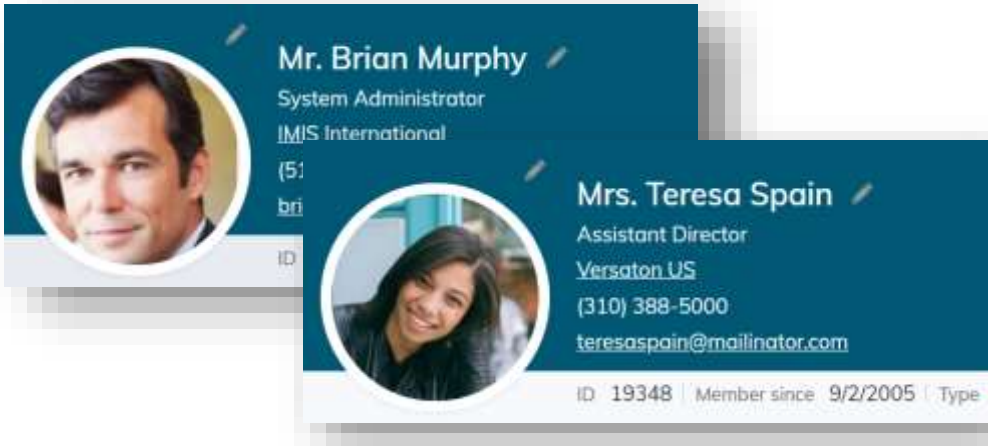


- Provide to ATS
  - URLs
  - Screenshots
  - Test accounts
  - Past ticket numbers
- Avoid emailing staff directly
- Use the client portal

## Server Error in '/' Application.

### Runtime Error

**Description:** An exception occurred







# ATS Client Portal

<https://atsol.org/portal>

Logging in:

- Enter email/password
- Click **Login** (not Enter)
- See portal

Available Functions

- Vary by access level

The screenshot shows the ATS Client Portal interface. At the top, there are navigation tabs: Home, Tickets, Projects, Recommendations, Knowledge Base, Configurations, Reports, and Account. A 'Create Ticket' button is visible in the top right. Below the navigation, there are several sections: 'Welcome John M... The ATS Client Portal provides you with easy and convenient access to submit and monitor the status of requests and projects.', 'Open Tickets (0)', 'Reports (11)', 'Knowledge Base' with a search bar, 'Alerts' (0 Unpaid Invoices, 0 Unapproved Recommendations, 0 Open/Unapproved Tickets), and 'Summary' with metrics: 2 Open Tickets, 5 Tickets This Month, and 172 Tickets This Year. A bar chart shows 'Total Tickets by Month'. Below this is a table titled 'Logging into the Portal' with columns for different access levels and rows for various functions. Below the table are sections for 'Navigating the Portal' and 'Creating a Ticket'.

Function	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6
Access all tickets (instead of just mine)	✗	✓	✓	✓	✓	✓
Approve Tickets	✗	✓	✓	✓	✓	✓
Change Contacts on Tickets	✗	✗	✓	✓	✓	✓
Access Reports	✗	✗	✓	✓	✓	✓
Maintain Company Contacts	✗	✗	✗	✓	✓	✓
Maintain Company Preferences	✗	✗	✗	✓	✓	✓
View Agreements	✗	✗	✗	✓	✓	✓
View/Print Customer Signoff Form	✗	✗	✗	✓	✓	✓
View/Print Invoices	✗	✗	✗	✓	✗	✓
Access all Opportunities (instead of just mine)	✗	✗	✗	✗	✓	✓
View Configurations	✗	✗	✗	✗	✗	✓





# Common Support Requests

- Manager password changed/expired/etc.
  - Symptoms
  - Expiration reminders
- Application pools
  - Symptoms



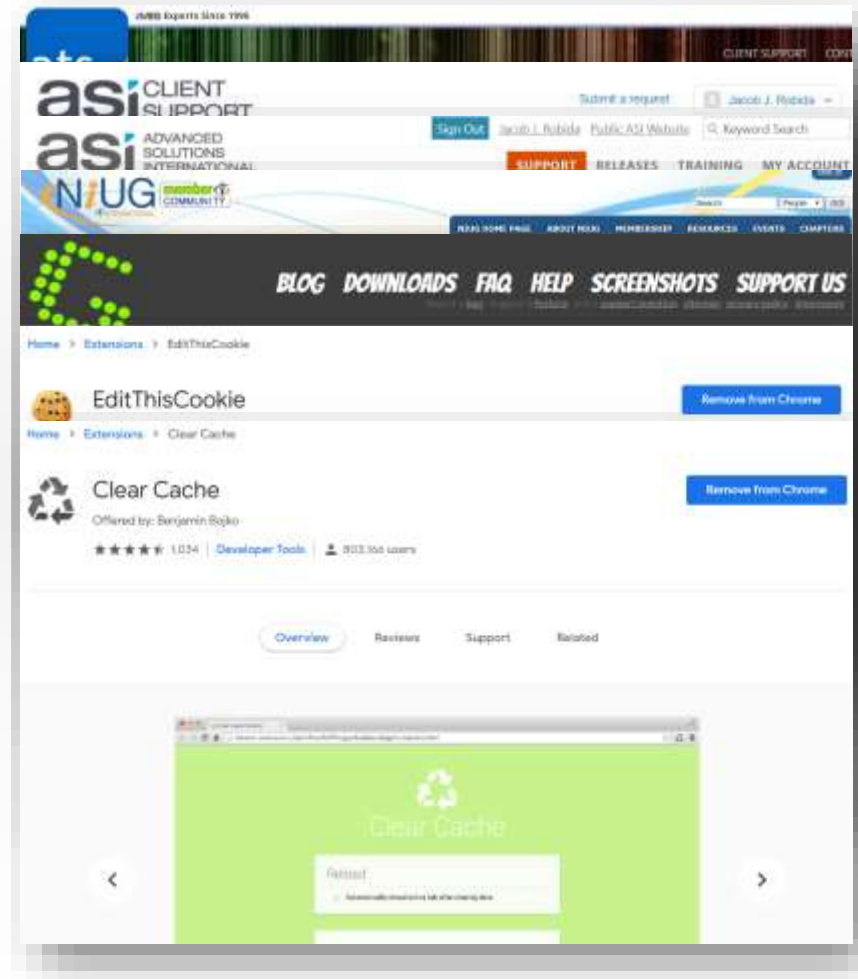
Your password has expired and will need to be reset using the 'Forgot my password' link.

## Service Unavailable

HTTP Error 503. The service is unavailable.



- [ATS Client Portal](#)
- [ASI Support](#)
- [iMIS Documentation](#)
- [NiUG](#)
- [Greenshot](#)
- [Browser Add-ons](#)
  - [Edit this Cookie](#)
  - [Clear Cache](#)



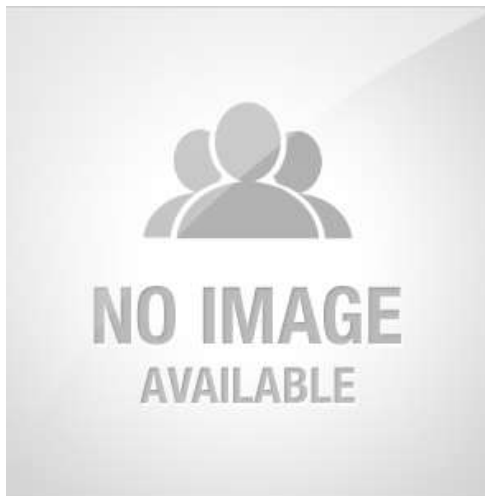


# Questions & Answers



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<http://atsol.org/PastWebinars>

*video recordings and  
downloadable presentation slides*

## Other Questions?

Email: [info@atsol.org](mailto:info@atsol.org)

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