



This document is to aid in the setup and preference selection for Kaseya BMS. Once you have setup the required items and your preferences have been received, we will continue with the following steps:

- Setup of the configuration between AutoElevate and Kaseya BMS
- Linking of users, companies, locations and computers
- Testing of the system

Please review the following items and then compile your preferences in the associated spreadsheet (KaseyaBMS-NewMSPInfoCollection.xlsx) and upload it to the secure OneDrive folder provided.

To better understand the different preferences please go into Kaseya BMS, open a new ticket and examine each of the mentioned items to decide how you want the system to work.

Tickets

1. What **Ticket Queue** should all **NEW** AE tickets go to?
2. What **Ticket Queue** should the ticket go to once a Technician has taken action on a Privilege Request (this can be the same queue as above)?
3. What **“Status”** should AutoElevate tickets be set to:
 - Initially when they are created? (usually this would be **“New”**):
 - When they are completed? (usually this would be **“Completed”**):
 - If something doesn't work correctly with the elevation? (pick a status that you already have on your system that would indicate to your staff that the ticket is waiting on technician intervention. Possibilities might be: **“Waiting Technician”** or **“Client Follow-up Needed”**. This Status is rarely used but necessary):
4. What **“Priority”** should AutoElevate tickets be set to? (typically, this would be **“Medium”** but is according to your preference):
5. What **“Type”** should AutoElevate tickets be set to? (please specify one that you have on your system or create a new one. A typical choice would be **“Service Request”** but may vary depending on your system setup.):
6. What **“Source”** should AutoElevate tickets be set to? (may vary depending on your system. A typical choice would be **“Other”**):

Time Entry

AutoElevate automatically enters a specified amount of time on each ticket whenever a technician takes action on a privilege request. The default amount is 15 minutes and can be changed to whatever value you want to in the Admin Portal. If set to **“0”**, time entries are disabled and only a note of the outcome is entered in on the ticket. We need 3 pieces of information (which can be referenced from a time entry on a ticket).

7. What should be the default amount of time that AutoElevate? (default is 15 minutes):
8. What **“Work Type”** should time entries be set to? (pick a Work Type that you already have on your system):
9. What **“Role”** should time entries be set to? (pick a Role that you already have on your system, common example would be “Remote Support”):
10. Who should be the default Resource? (this is needed in case the AutoElevate user that responds isn’t “linked” to an Kaseya BMS user):

Create an “Issue Type” and “Sub-Issues”

11. Create a new **“Issue Type”** called **“Privilege Request”** (or we can map to an existing Issue Type, please specify)
 - To create a new **“Privilege Request”** Issue Type do the following:
 - Go to Admin -> Service Desk -> Issue Types -> New
 - Enter **“Privilege Request”**
 - Make sure the **“Active”** checkbox is checked
 - Create the following 4 new Sub-Issue types making sure each has the **“Active”** box checked (or we can map to existing Sub-Issue types, please specify):
 - **“Approved – One Time”**
 - **“Approved – Rule Made”**
 - **“Denied – One Time”**
 - **“Denied – Rule Made”**