Insights

- FASTER FIXES, FIRST TIME -

Quick Start User Guide

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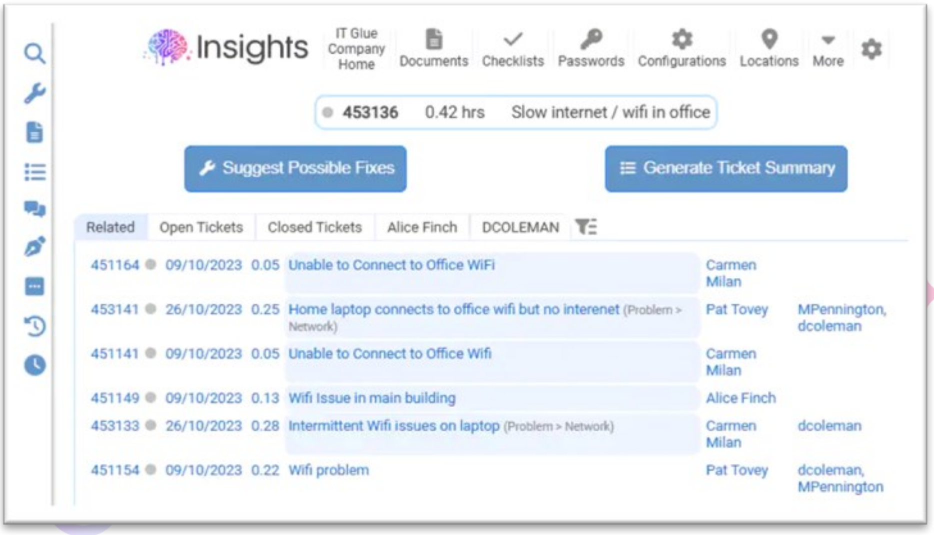
What is Insights?

Insights is software that lives inside every ConnectWise support ticket.

It is designed to give you tools and information to help solve tickets faster.



What does Insights do?

Insights provides a range of tools, such as Related Tickets, Time Entry Search and Suggested Fixes to help you solve support tickets faster, and supporting tools such as Job Notes Generator, Text Perfecter, Chat GPT Direct and Password Generator to help your everyday engineer tasks.

Insights helps to:

- Increase your First Time Fix rate and reduce escalations
- Unlock information buried in previous support tickets
- Help train your team and get new technicians up to speed faster
- Generate your Job Notes and help communicate with your clients

Our mission is to save you time on every ticket, and solve more tickets without escalation.

This user guide is intended for use once Insights has already been set up in your organisation, and you are able to add it as a POD into your ConnectWise Service Ticket pages.

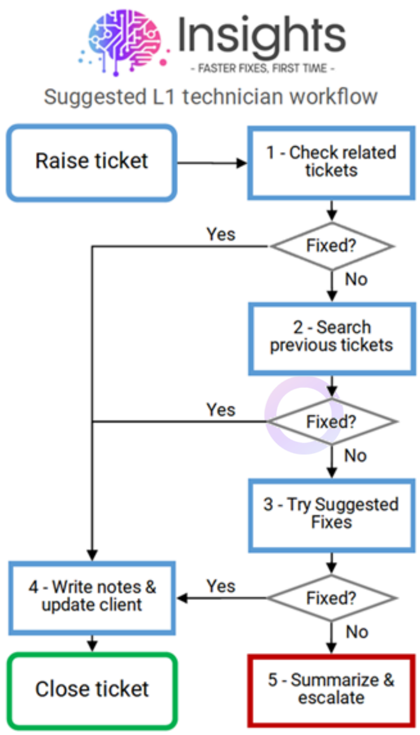
When to use Insights?

When you open a new ticket and read the notes, you'll be in one of a few positions:

- **You may already know how to solve the ticket…**

  Here, Insights will be most helpful for writing your Job Notes, and providing links to information in your documentation.

- **You have an idea how to solve the ticket but need more information, or**
- **You don't currently have any ideas how to solve the problem.**



Which Insights features should you use, and when should you use them?

We'll go into each feature in more detail shortly. We recommend using Insights main features in the following order:

1 - **Related Tickets** - Insights presents a list of Related Tickets it thinks will give more information about the current problem. You can open those tickets or get Insights to summarize the previous solutions for you.

2 - **Time Entry Search** - If related tickets don't help, use Insights' search feature to find similar issues you worked on.

3 - **Suggested Fixes** - If you're in need of some inspiration, the Suggested Fixes feature gives you a list of distilled and targeted ideas to try, with optional step-by-step guides, right there in the ticket.

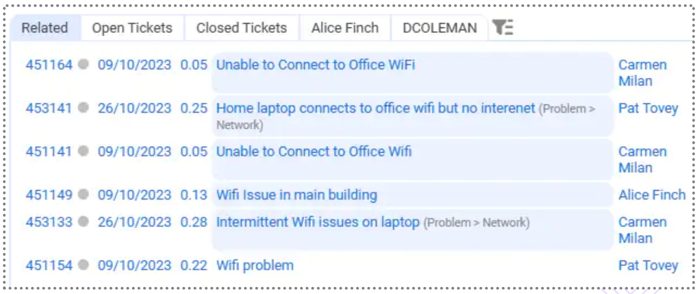
4 - **Job Notes Generator** - If any of these features helped you solve the ticket, use Insights to write your Job Notes and update the client before closing it.

5 - **Summary Tool** - If you were unable to solve the ticket, use Insights write your job notes and summarize the work you've done before escalating it.

Each time a feature is used, it's recorded in the Insights Audit section. Whenever a ticket is escalated, some MSPs ask the escalated technician to ensure the above process has been followed, else the ticket is returned to the level 1 engineer.

Let's look at each of these features in greater detail...

1 - Related Tickets



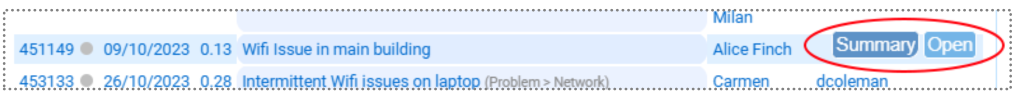
Insights' list of related tickets

Every time you open a ticket in ConnectWise, Insights immediately checks for previous related tickets for the client you're working on and presents them in a ranked order of relevance.

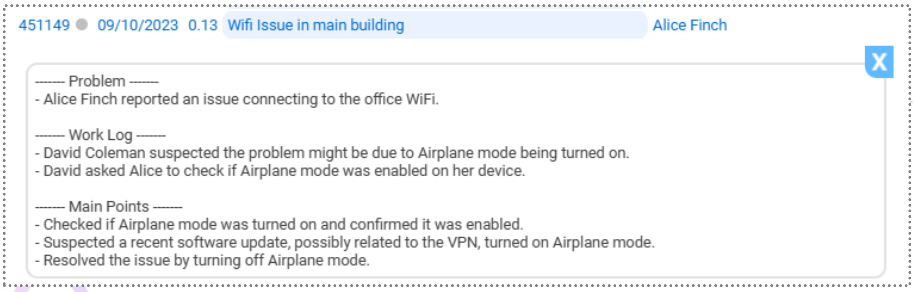
Previous tickets with a high related score are presented with their backgrounds highlighted.

Key information, such as ticket status and number of hours recorded in time entries are also shown against each related ticket.

You can directly open any related ticket in a new tab, or click to generate a summary of the work carried out in the ticket and how it was solved right there inside the POD.



Summary button and button to open ticket in new tab when hover over related ticket



A summary of a related ticket within Insights

Related tickets are grouped into five tabs:

- Tickets automatically ranked by relevance
- Recent open tickets for this client
- Recent closed tickets for this client
- Recent tickets raised by this client staff member
- Recent tickets for this client for the current technician

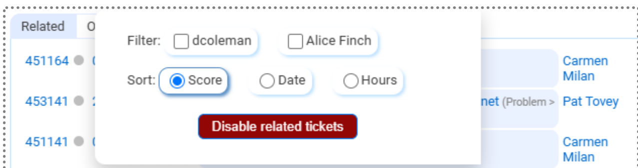
Access the related ticket filtering options

Related tickets can be filtered to:

- those worked on by the current technician
- those raised by the current client member of staff

and they can be sorted by:

- related score (default)
- date the ticket was raised
- number of technician hours recorded against the ticket



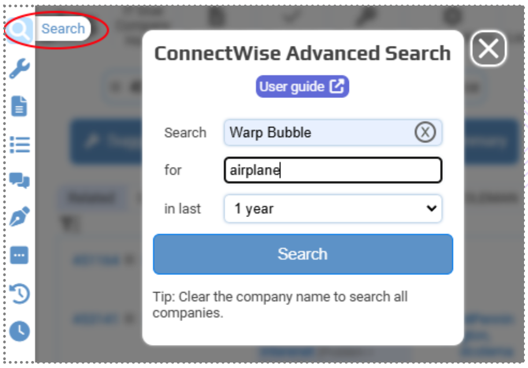
Related tickets filtering options

Full and up-to-date details on Related Tickets can always be found in the full online user guide at https://darklabs.ai/user-guide/related-tickets.aspx

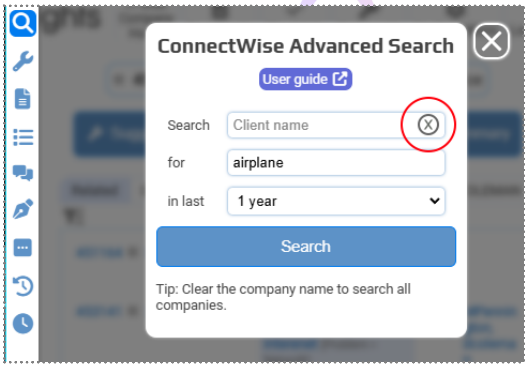
2 - Time Entry Search

Quite often, you may remember working on a similar problem but can't pinpoint when it was or what you did. Using Insights' advanced time entry search, you can quickly and easily search for keywords on any ticket.

The search period defaults to the past year but can be changed to search through different time periods.



Click the magnifying glass icon in the menu to access the time entry search

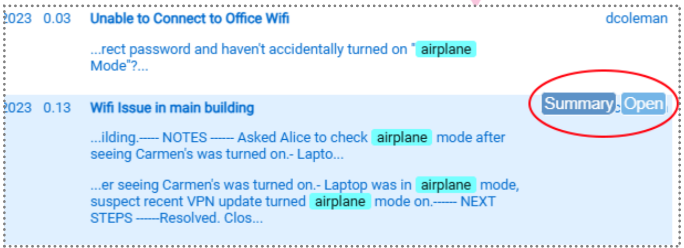


Clear the company name to search all clients

The search feature defaults to the current client, but clearing the client's name will search through all clients.

Search results are presented in a list, by default scored by the relevance of the keyword. They can also be ordered by the ticket date or the number of work hours recorded against each ticket, and filtered by current technician or by the staff member who raised the current ticket.

Insights time entry search results

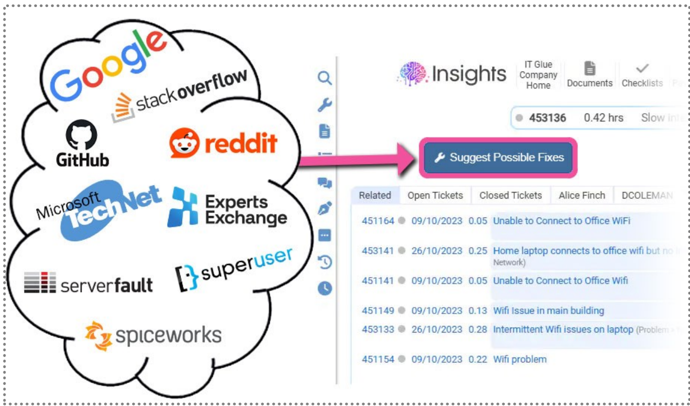


You can summarize or open a search result ticket

When hovering over the results, you can open the tickets in a new tab, or use the summary feature to see the work that was carried out and how it was solved.

3 - Suggested Fixes

At the click of a button, based on AI's vast training on publicly available data, Insights will suggest a list of solutions relevant to the current problem, taking into account any work that has already been carried out and recorded in the ticket notes.



The 'Suggest Possible Fixes' button saves you trawling through countless search results

------ Problem ------

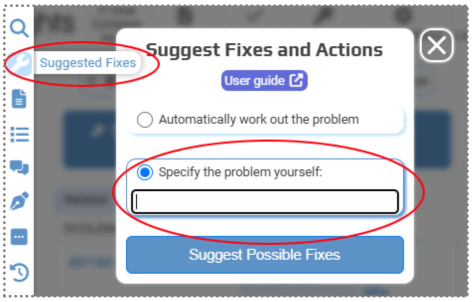
The client is unable to print from their printer.

------ Possible Solutions ------

- Verify that the printer is properly connected to the network or directly to the computer via USB and that all cables are secure.
- Check to ensure the printer is powered on and there are no error messages or indicator lights flashing on the printer's display panel.
- Verify that the printer has the latest firmware installed, and if not, update the firmware from the manufacturer's website.
- Confirm that the printer is set as the default printer in the computer's settings under Devices and Printers.
- Open the print queue and clear any stuck print jobs that might be causing a backlog.
- Restart the Print Spooler service on the computer by navigating to Services, finding Print Spooler, right-clicking, and selecting Restart.
- Ensure the printer drivers are up-to-date by downloading and installing the latest drivers from the printer manufacturer's website.
- Check the printer's IP address to ensure it has not changed and matches the IP address in the printer settings on the computer.

Example of Insights' suggested fixes

The fixes range from the simplest solutions, and increase in complexity to give a broad range of possible resolutions. Entry level engineers will benefit from the range and train them to think about how to go about solving problems, and even seasoned professionals often spot one or two 'gold nuggets' they hadn't thought of, or it sparks enough of an idea to get them on the correct path.



You can ask for suggested fixes to custom, specific problems

Suggest fixes to custom problems

In the Suggest Fixes section of the left-hand menu, you can also enter a specific problem that isn't read from the main ticket and Insights will suggest solutions.

Step-by-step guides

For any of the solutions offered by Insights, you can click on the "How" button, and AI will give you a step-by-step guide on how to carry out the suggested fix.

- Verify that the printer has the latest firmware installed, and if not, update the firmware from the manufacturer's website.
- Confirm that the printer is set as the default printer in the computer's settings under Devices and Printers.
- Open the print queue and clear any stuck print jobs that might be causing a backlog. How? Add to notes
- Restart the Print Spooler service on the computer by navigating to Services, finding Print Spooler, right-clicking, and selecting Restart.

Hover over a fix and click "How?" to generate a step-by-step guide

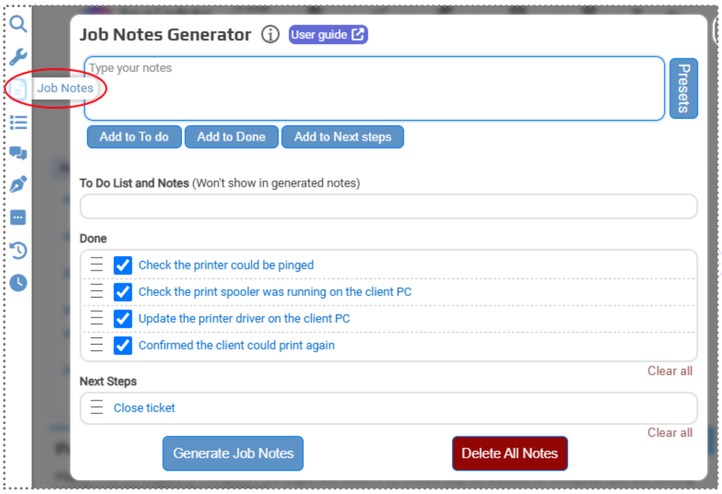
Instructions for: - Open the print queue and clear any stuck print jobs that might be causing a backlog. X

1. **Open the Print Queue:**
- On Windows: Go to 'Settings' -> 'Devices' -> 'Printers & scanners', select the affected printer, and click 'Open queue'.
- On macOS: Open 'System Preferences' -> 'Printers & Scanners', select the printer, and click 'Open Print Queue'.

2. **Clear Stuck Print Jobs:**
- In the print queue window, right-click on any stuck print jobs and select 'Cancel'.
- If you can't cancel a job, try restarting the print spooler service on Windows. Open 'Services' (Windows + R, then type 'services.msc') and restart the 'Print Spooler' service.

A step-by-step guide generated by Insights

4 - Job Notes Generator and To Do List



A log of work entered by a technician

The idea of the Job Notes Generator is to make it easier to record everything you do on a ticket and to write it into a standard template, making it easier in the future to see how a ticket was solved.

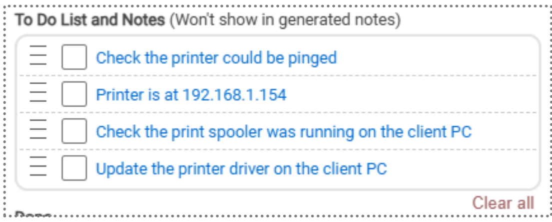
As you work on a ticket, you can record a log of what you've done, line-by-line.

At any point, click on "Generate Job Notes" to create a spell-checked and pre-formatted output to insert into a Ticket Note or Time Entry.

Insights can then also generate a customer-facing version to send to your client.

Job Notes Generator sections

The Job Notes screen has three sections, **a) "To Do List and Notes", b) "Done"** and **c) "Next Steps".** Items can be dragged to re-order or move between each section.



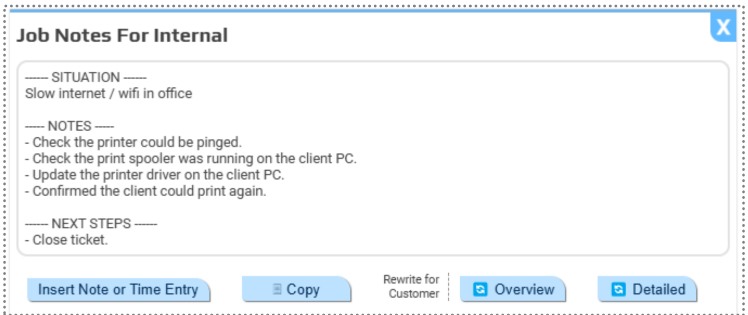
The Job Notes To Do List and Notes section

a) To Do List and Notes - Here, you can list actions you need to complete or want to try in order to close the ticket.

Items in the To Do List will not be included in your final Job Notes unless you move them into the "Done" section. This section is also useful for storing temporary information.

b) The "Done" list - This list keeps a log of all the work the technician has entered. Any entry in the "Done" list will be included when you generate your Job Notes.

c) The "Next Steps" List - Items entered into this list will appear on the "Next Steps" section of the generated Job Notes and are intended to tell either the client, or anyone from your company reviewing the ticket what will happen next. Common entries here include "Close the ticket", "Escalate the ticket" or "Waiting for client".



Generated Job Notes

Generated Job Notes

Your Job Notes can be edited if required, and then added to the ticket via the "Insert Note or Time Entry button (if enabled for your company; this features is currently being rolled out).

Rewrite for Customer - Overview or Detailed

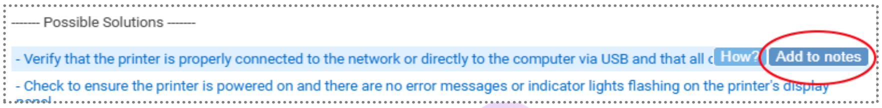
Like any output in Insights, you can generate a client-facing, friendlier and less-techie-sounding version of your job notes to send to your customer.

This can be copied and pasted straight into an email or added as a note in ConnectWise that gets sent to your customer.

4 - Job Notes Generator and To Do List (Continued)

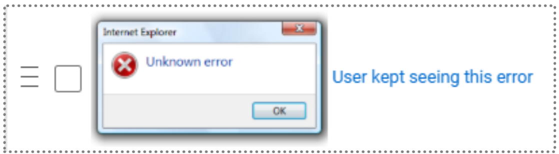
Add To Do items from suggested fixes

When you use Insights' Suggested Fixes feature, you have the option of clicking "Add to notes", and each fix will automatically appear in the To Do list.



Add Suggested Fixes to Job Notes

Suggested Fix added to Job Notes



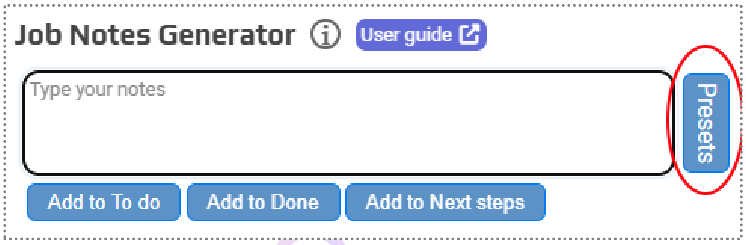
You can paste images into Job Notes

Include images and screenshots in your notes

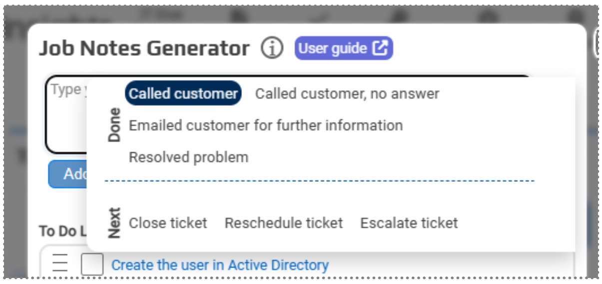
You can also paste images into the Job Notes section that will be automatically inserted into your Ticket Notes and Time Entries.

Preset phrases

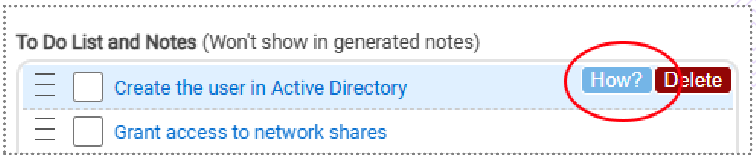
Next to the Notes Entry box, hovering over the "Preset phrases" button gives common entries for each section. Clicking on a preset phrase will automatically insert it into the relevant list.



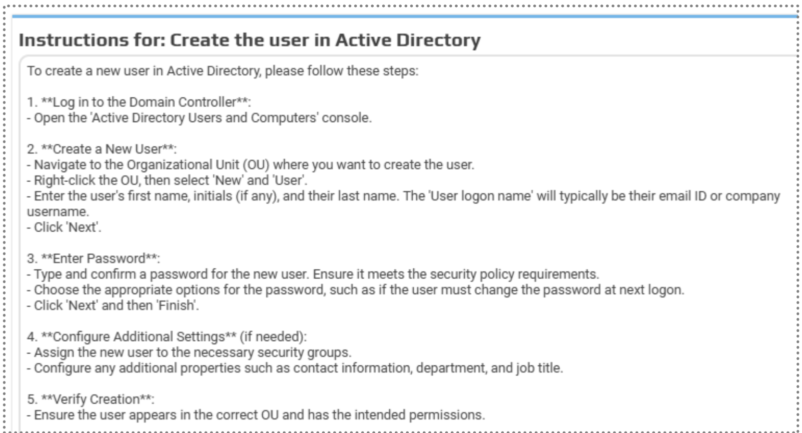
Preset phrases button



Preset phrases for job notes



Ask how to carry out a task in your To Do List



Instructions for: Create the user in Active Directory

To create a new user in Active Directory, please follow these steps:

1. **Log in to the Domain Controller**:
- Open the 'Active Directory Users and Computers' console.

2. **Create a New User**:
- Navigate to the Organizational Unit (OU) where you want to create the user.
- Right-click the OU, then select 'New' and 'User'.
- Enter the user's first name, initials (if any), and their last name. The 'User logon name' will typically be their email ID or company username.
- Click 'Next'.

3. **Enter Password**:
- Type and confirm a password for the new user. Ensure it meets the security policy requirements.
- Choose the appropriate options for the password, such as if the user must change the password at next logon.
- Click 'Next' and then 'Finish'.

4. **Configure Additional Settings** (if needed):
- Assign the new user to the necessary security groups.
- Configure any additional properties such as contact information, department, and job title.

5. **Verify Creation**:
- Ensure the user appears in the correct OU and has the intended permissions.

A generated step-by-step guide for your To Do List task

Step-by-step guides

When you hover over any entry in the Job Notes section, you can click the "How" button to have Insights generate a step-by-step guide on how to carry out the task in the list.

This works best when there is enough context, such as direct tasks, such as "Create the user in Active Directory", for example.

Deleting items

You can delete individual items in each list by hovering and clicking the "Delete" button.

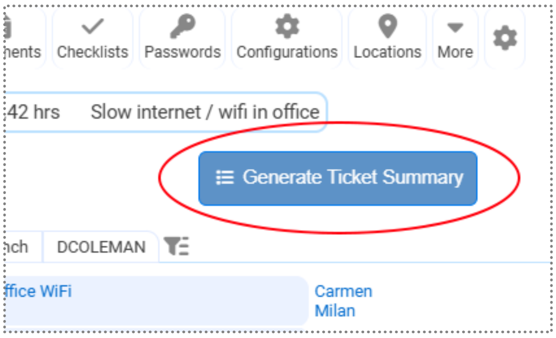
You can also clear entire lists by clicking the "Clear all" button to the bottom-right of the list.

5 - Summary Tool

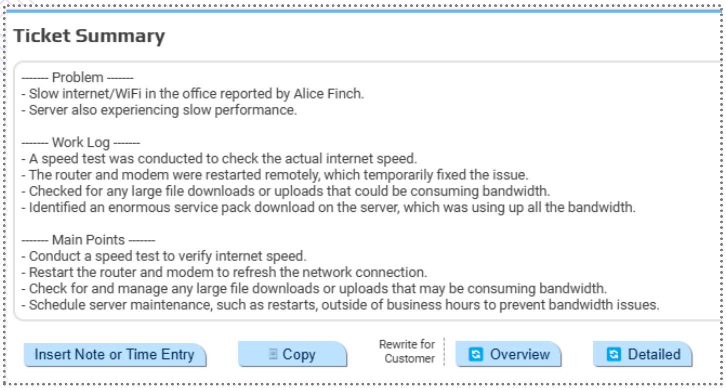
Current ticket summary

When a support ticket already has a lot of notes, it can take time for a new technician to get up to speed on what has already been attempted to try and solve the problem.

In Insights, click the “Generate Ticket Summary” button to sum up all of the most important information and steps that have already been attempted to easily get to grips with the state of the ticket.



The “Generate Ticket Summary” button



An example ticket summary

We also recommend technicians generate a summary and save it as a note against the ticket before escalation ready to brief the next technician to work on it.

Insights Additional Features

IT Glue Integration - Full details: https://darklabs.ai/user-guide/it-glue.aspx

If you use IT Glue for your documentation, Insights can provide client-specific links direct to your important information.

When enabled, Insights shows links to each area within IT Glue for the specific company whose ticket you're working on.

When you click one of the links, it opens a new tab straight to the relevant section within IT Glue, so all of your information is still behind IT Glue's security and user permissions.

Chat GPT Direct - Full details: https://darklabs.ai/user-guide/chat-gpt-direct.aspx

Talk directly to the latest model of Chat GPT from within the ConnectWise support ticket. It's instructed to behave like an IT support technician and is pre-loaded with contextual information about the support ticket, so you can ask direct questions about it.

Password Generator - Full details: https://darklabs.ai/user-guide/password-generator.aspx

The password generator allows you to instantly create and copy a secure, random password to the clipboard.

By default, a password is automatically generated and ready to copy that is 12 characters long, includes uppercase and lowercase letters, includes a minimum of 3 numbers and a minimum of 3 special characters. Any of these requirements can be altered to meet your specific criteria.

Text Perfecter - Full details: https://darklabs.ai/user-guide/text-perfecter.aspx

This feature uses AI to turn whatever you type into perfect English and is designed to keep your communications with your clients professional.

The Text Perfecter feature is commonly used:

- by technicians where English may not be their first language
- by individuals who struggle with the written word, spelling or grammar
- when you're struggling to put a specific concept into words and need help explaining something in plain English

Insights Tasks - Full details: https://darklabs.ai/user-guide/tasks.aspx

Insights Tasks is a unique feature allowing you to set up notes and To Do lists against any combination of Client, Ticket Board, Ticket Type, Sub-type and Item.

Provide easy-to-follow steps for common tasks directly inside the ticket.

End of the Quick Start guide

We hope that gives you a quick overview of the main features of Insights.

We have a full training area with videos on our website at https://darklabs.ai/training.aspx

If you have any questions, feedback or suggestions, pleas always feel free to email hello@darklabs.ai