A futuristic fighter jet is shown in flight, moving from left to right across the frame. The jet is white with red accents and is emitting a bright pinkish-purple glow from its engines. The background features a dark, futuristic cityscape with tall buildings and a large, full moon in the sky. The overall color palette is dominated by blues, purples, and pinks.

Atera's AI Copilot playbook

5 practical use cases
to start seeing ROI fast



Transforming IT work with ✨ AI Copilot



96% of respondents plan to expand their use of AI agents in the next 12 months, with half aiming for significant, organization-wide expansion."

Cloudera, "The Future of Enterprise AI Agents: Unlocking Autonomous Transformation in 2025" survey report, Feb. 2025

As an IT professional, your time is pulled in many directions: Resolving urgent issues, keeping systems up to date, and staying ahead of the next problem. Too often, the day disappears into repetitive tasks, data searches, and manual troubleshooting that drain focus and slow progress.

Built directly into the Atera platform, AI Copilot helps you cut through the noise. It's available 24/7, helping you find answers instantly, automate tedious work, and act faster with confidence.

✦ AI Copilot in action

Getting instant answers from your account data

Which devices have been offline for more than 3 months?



Auto-filling the details so you don't have to

Flag this ticket as a potential security concern



Troubleshooting without the guesswork

Why is this user's computer running slow?



Creating scripts from a single instruction

Block USB access on all Windows devices



Running commands without remembering the syntax

Export system event logs from the past 7 days



This playbook shares practical ways to put AI Copilot to work in your everyday workflow, offering low-effort, high-ROI use cases that can save you hours of work and frustration, freeing time for tasks that deliver real value. Unlike generic AI tools, AI Copilot is built into the Atera platform, meaning it can draw on years of IT-specific data and expertise as well as your own account data; surfacing insights, use cases, and information uniquely relevant to your environment.

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Fast insights into your account data

IT technicians spend a significant portion of their time manually monitoring and managing device statuses, often chasing down endpoints that have gone dark without clear insight into context, patterns, or historical issues. Sorting through lengthy lists of devices wastes hours and delays incident response and resolution, complicates asset audits, creates knowledge gaps, and makes it hard to obtain a comprehensive picture.

With AI Copilot, you can quickly get personalized answers based on your Atera account data, whether you're looking for missing endpoints or analyzing ticket trends. No more log diving or data crunching, just ask and get instant clarity.



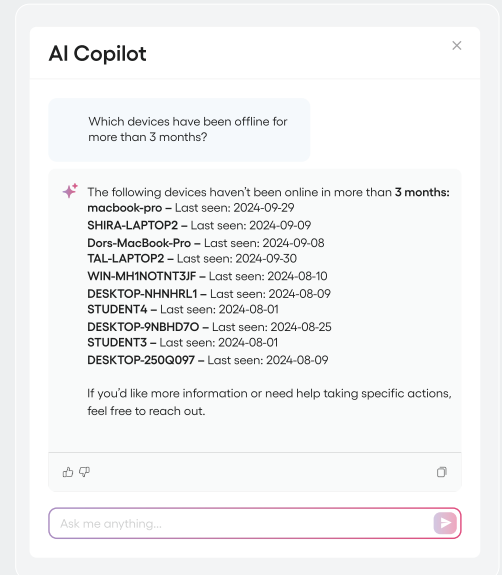
See what's been offline the longest

What if you could surface the devices that have been offline the longest, automatically? Instead of digging through logs or spreadsheets, technicians could instantly spot the riskiest gaps, take action faster, and ensure nothing critical slips through the cracks.

Try asking:

"Which devices have been offline for more than 3 months?"

✦ AI Copilot will search your account and return a list of matching devices, including the date they were last online.



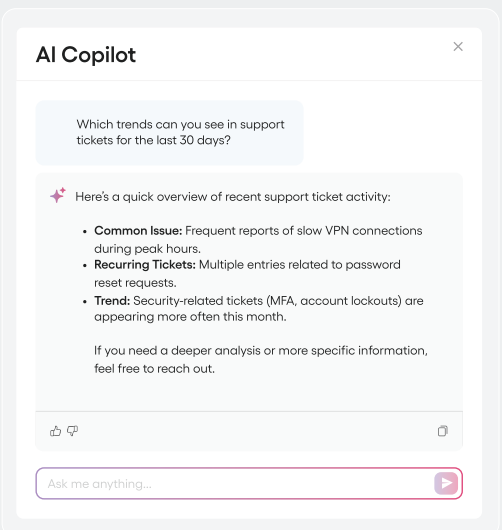
Identify trends in last month's support tickets

What if you could spot trends in support tickets instantly? Instead of manually sifting through every ticket and risking missed patterns, your team could spot recurring issues, uncover root causes, and take preventive action instead of just reacting.

Try asking:

"Which trends can you see in support tickets for the last 30 days?"

✦ AI Copilot will scan your recent support activity and highlight recurring issues, rising topics, or unusual patterns such as frequent device errors, repeated questions from certain users, or spikes in certain ticket categories.





How to use ✨ AI Copilot?

AI Copilot is available across the entire Atera platform.

- ✓ Open AI Copilot using the icon in the bottom right corner of your screen.
- ✓ Ask your question, either by typing or using voice input.
- ✓ You can even upload images to provide additional context.

Ask anything related to tickets, devices, or users to get instant insights from your own account data, or to gain information about your alerts,





Auto-populate custom ticket fields based on your data

IT technicians lose many hours manually filling in fields for each support ticket, often pulling information from scattered sources or relying on memory to ensure accuracy. This repetitive data entry slows down response times, increases the risk of human error, and creates inconsistencies across tickets that hinder reporting and root cause analysis. As ticket volumes grow, the administrative overhead adds up, taking time away from higher-impact work and complicating efforts to standardize workflows, enforce SLA policies, or uncover broader operational insights.

With AI Copilot, you can quickly analyze the ticket content for fields like category and priority, while automatically filling in fields to save time and ensure consistency.



Spotting upsell opportunities within tickets

Upsell opportunities are easy to miss as technicians stay focused on solving issues rather than spotting sales potential. As a result, chances to grow revenue or improve the customer's setup often go unnoticed.

AI Copilot analyzes context such as device limitations, expired licenses, and repeated feature requests to identify opportunities for recommending relevant product or service upgrades. This helps technicians to surface value-adding suggestions naturally during routine interactions, without needing to manually search for them.

Add Rule

- Rule Name:** Upsell opportunity
- Description:** Ticket with upsell opportunity?
- Trigger:** New Ticket Created
- Ignore Flow:** No
- Active:** No

Buttons: Close, Add

Upsell opportunity Ticket with upsell opportunity?

Buttons: Manage Rule, Delete

Triggers: New Ticket Created, Ignore Flow: No

Ticket Property	Operator	Expected Value	Must Match	Action
			<input type="checkbox"/>	Add

Action Type	Related Field / Webhook / Email Template	Value	Action
Set Field Value by Copilot	Upsell opportunity?		Add

Security concerns within tickets

Security issues often hide in everyday support tickets, and without clear indicators, they can be overlooked. Technicians may miss red flags when threats are not immediately obvious or are buried in routine language.

AI Copilot analyzes support tickets in real-time to detect language or patterns that indicate a potential security issue, like unauthorized access, suspicious behavior, or unpatched vulnerabilities. It flags these tickets so technicians can prioritize them, investigate faster, and reduce the risk of vulnerabilities being exploited.

#7555 Very fishy email

Created a few seconds ago • Modified a few seconds ago

Status: Open | Assigned group: Assign | Assign technician: Danielle Zamir | Type: Incident | Activity status: Read | SLA: 4h | Sentiment:

Public reply | Internal note

Generate reply or type your message here

Attach files | Select quick reply template

Conversation (1) | Ticket activity (3)

Sort by: Newest | Generate article

JM Johnnie Malone Sep 1, 2025, 4:46 PM
I got an email very fishy, I think my computer is under attack

On this ticket: Copilot | Actions

Ticket properties

Form template: Copilot - auto fill

Tags: Security / Virus, Malware...

Priority: Low

Impact: No Impact

Security concern?

Calendar: Liverpool

New calendar event



How to use ✨ AI Copilot?

Auto-populate your custom fields with the following steps:

- ✓ Create your 'Custom fields' (i.e., "Upsell opportunity" or "Security concern").
- ✓ Add them to your 'Forms.'
- ✓ Set up 'Ticket automation rules.'
- ✓ Choose triggers like "New ticket created" or "Ticket status changed."
- ✓ Go to 'New ticket' or update an existing ticket to check your new custom field.





Real-time device troubleshooting

IT technicians diagnose and resolve issues across a growing number of devices, locations, and systems, all while being expected to minimize disruption to end users. The ability to troubleshoot devices in real time enables faster, more flexible interventions, not only reducing user downtime but also allowing technicians to handle more tickets per day and triage urgent problems immediately. Without instant troubleshooting, even minor issues can snowball into prolonged outages or require on-site visits that strain already stretched teams. Real-time access to live system data empowers IT staff to identify root causes more accurately, apply fixes on the spot, and monitor outcomes, all while maintaining consistent service standards at scale.

With AI Copilot, you can quickly diagnose and troubleshoot in real-time, increasing efficiency and satisfaction on both sides of the ticket.



Troubleshooting slow computers

When users report vague issues like slow devices or connections, technicians often waste time chasing symptoms and information and switching between multiple tools. Without instant visibility into what's happening on the device, resolving these tickets becomes a slow, inefficient process that frustrates both sides.

Try asking:

“Why is this user’s computer running slow?”

✦ AI Copilot connects to live device data to instantly analyze performance, activity, resource usage, and error logs when a user asks something like “Why is my computer slow?” It surfaces the most likely root causes, helping technicians troubleshoot faster and more accurately without manual digging or lengthy back-and-forths.

AI Copilot

Why is this user's computer running slow?

✦ **Here's the scoop on the slowpoke PC:** The main culprit seems to be low memory availability. The “**topiad**” and “**svchost**” processes are hogging the most memory. You might want to close any unnecessary apps or services to free up some RAM. Let me know if you need a hand with that!



Ask me anything...





Troubleshooting a crashing browser

Application crashes can stem from a range of hidden issues like low memory, corrupt extensions, or OS-level problems, and without live diagnostics, technicians are left guessing. Traditional troubleshooting takes time and often leads to trial-and-error, delaying resolution and increasing user frustration.

Try asking:

"Why is Google Chrome crashing on this device?"

When a user reports that Google Chrome keeps crashing, ✨ AI Copilot instantly pulls real-time data like memory usage, crash logs, extension conflicts, system changes, and error events. It analyzes the information and delivers clear insights, helping technicians act quickly and resolve the issue without unnecessary back-and-forth.

AI Copilot



Why is Google Chrome crashing on this device?

- ✨ Possible Fix for **Google Chrome** Crashing
Recent Windows updates may be the cause of the issue. You can try removing them by following these steps:
- Open the Start Menu and go to **Settings**
 - Navigate to **Update & Security**
 - Click View update history
 - Select **Uninstall updates**
 - In the Control Panel, find the update you'd like to remove, select it, and click **Uninstall**

For additional instructions, refer to the linked guide. Let me know if this helps or if you'd like more assistance.



Ask me anything...





Generate instant scripts in any language

Scripts are an important tool in the kit of IT technicians looking to automate repetitive tasks, enforce configurations, or resolve common issues across multiple systems. Writing scripts from scratch, however, requires much time as well as a deep familiarity with different scripting languages, syntax, and system variables.

AI Copilot helps you create custom scripts with minimal effort, just by describing what you want in natural language. AI Copilot understands your intent and generates a ready-to-use script in the appropriate language (e.g., PowerShell, Bash, etc.), which you can apply immediately across devices. Unlike generic AI tools such as ChatGPT, it leverages your own account data and relevant context for generation.

For experienced scripters, AI Copilot helps cut the time spent searching for examples, debugging, or reusing outdated templates. For the less experienced, it lowers the skill barrier, enabling them to implement solutions faster and with greater confidence. By accelerating script creation, AI Copilot allows IT teams to respond to requests more efficiently, standardize procedures, and focus their expertise on higher-level problem-solving.



Prevent the use of USB drives

For common IT tasks like restricting USB access, teams waste valuable time on something that could be automated instantly.

Try instructing:

“Block USB access on all Windows devices”

✦ AI Copilot takes your plain-language instruction and instantly generates a ready-to-use PowerShell script to disable USB storage. You can review the script, edit it if needed, and then deploy it to one or multiple machines. No need to search online for code snippets, remember specific syntax, or test multiple variations.

← Create script

Create your own script or generate one using AI. [Learn more](#)

Cancel

Create

Script Name * File type

Script description *

This PowerShell script provides functionality to block or enable USB storage devices on Windows by modifying the registry settings. It includes two main

Category

Enter category

Enable for AI assistants

More script properties

✦ Copilot: script generator

Leverage the power of AI to quickly generate scripts!

Describe what the script should do

Block USB access on all Windows devices

Examples

✦ Modify

Is this script helpful?

Script editor

Create or modify your script. Use `{variable_name}` for variables (no spaces or special characters)

✦ Copilot: Type '#', describe what you want, and press 'Enter' to generate code

Select online agent to run script

```

1 # PowerShell Script to Block USB Access on Windows Devices
2
3 # Function to block USB storage devices
4 * function Block-USB {
5     # Define the registry path for USB storage devices
6     $usbRegistryPath = "HKLM:\SYSTEM\CurrentControlSet\Services\USBSTOR"
7
8     # Check if the registry path exists
9 *   if (Test-Path $usbRegistryPath) {
10        # Set the Start value to 4 to disable USB storage
11        Set-ItemProperty -Path $usbRegistryPath -Name "Start" -Value 4
12        Write-Host "USB storage devices have been blocked successfully."
13    } else {
14        Write-Host "USBSTOR registry path does not exist. Unable to block USB ac
15    }
16 }
17
18 # Function to enable USB storage devices
19 * function Enable-USB {
20     # Define the registry path for USB storage devices
21     $usbRegistryPath = "HKLM:\SYSTEM\CurrentControlSet\Services\USBSTOR"
22
23     # Check if the registry path exists
24 *   if (Test-Path $usbRegistryPath) {
25        # Set the Start value to 3 to enable USB storage
26        Set-ItemProperty -Path $usbRegistryPath -Name "Start" -Value 3
27        Write-Host "USB storage devices have been enabled successfully."
28    } else {
29
30

```

Clear temp files to free up disk space

IT teams often waste hours managing basic maintenance jobs across devices manually, especially when they don't have the exact commands prepared or need to adapt them per OS.

Try instructing:

"Clear temporary files to free up disk space"

✦ AI Copilot instantly generates a ready-to-run script to locate and remove temporary files. You can review and execute it immediately, freeing up disk space without searching for code snippets or manually writing the script.

What used to be a repetitive, error-prone task becomes a quick, one-click solution, helping devices run more smoothly while freeing valuable technician time.

← Create script

Create your own script or generate one using AI. [Learn more](#)

Cancel

Create

Script Name *
USB Access Control on Windows Devices

File type
.ps1

Script description *
This PowerShell script provides functionality to block or enable USB storage devices on Windows by modifying the registry settings. It includes two main

Category
Enter category

Enable for AI assistants

More script properties

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Create or modify your script. Use {variable_name} for variables (no spaces or special characters)

✦ Copilot: Type '#', describe what you want, and press 'Enter' to generate code

Select online agent to run script

```
1 # Function to block USB access
2 function Block-USB {
3     # Implementation to block USB access
4     Write-Host "USB access has been blocked."
5 }
6
7 # Function to enable USB access
8 function Enable-USB {
9     # Implementation to enable USB access
10    Write-Host "USB access has been enabled."
11 }
12
13 # Function to clear temporary files
14 function Clear-TemporaryFiles {
15     $TempPath = [System.IO.Path]::GetTempPath()
16     try {
17         Get-ChildItem -Path $TempPath -Recurse | Remove-Item -Force -ErrorAction
18         Write-Host "Temporary files cleared successfully."
19     } catch {
20         Write-Host "An error occurred while clearing temporary files: $_"
21     }
22 }
23
24 # Main script execution
25 try {
26     Prompt-UserAction
27     Clear-TemporaryFiles
28 } catch {
```





Generate commands without syntax memorization

IT technicians often rely on command-line tools to perform critical tasks, from system diagnostics to software management. But remembering the exact syntax for each command can slow everything down, especially for tasks you don't run every day. With variations across operating systems and tools, even a small error can cause commands to fail or produce unexpected results.

Technicians, therefore, end up switching between documentation, forums, and terminal windows just to double-check formats, which breaks focus and wastes valuable time. This constant need to recall specific syntax adds friction to workflows and gets in the way of resolving issues efficiently.

AI Copilot understands your intent based on natural language, and instantly generates the correct command, ready to run in the appropriate environment.



Export event logs

Event logs record significant activities within a system and provide valuable insights for diagnosing issues or identifying potential problems. However, these logs can grow rapidly, making it time-consuming and inefficient to search through them manually. Exporting them can streamline the process, enabling faster analysis, easier filtering, and better long-term storage for auditing or troubleshooting purposes.

Try instructing:

“Export system event logs from the past 7 days”

✦ AI Copilot will translate your request into the exact PowerShell or command-line syntax needed to pull only the logs you want, and save them as a file in the right format and location. This removes the guesswork from command creation, speeding up the process and ensuring you get the precise data you need for diagnostics or reporting.

evantest1 - Command Prompt

Run your own command or generate one using AI. [Learn more](#)

^ ✦ Copilot: command generator

Export system event logs from the past 7 days ✕ ✦ Generate

```
Microsoft Windows [Version 10.0.19045.6093]
(c) Microsoft Corporation. All rights reserved.

C:\Windows\system32>wevtutil epl System "C:\Path\To\ExportedLogs.evtx" /q:"*[System[TimeCreated[timediff(@SystemTime) <= 604800000]]"[]
```

Close Go to agent Clear



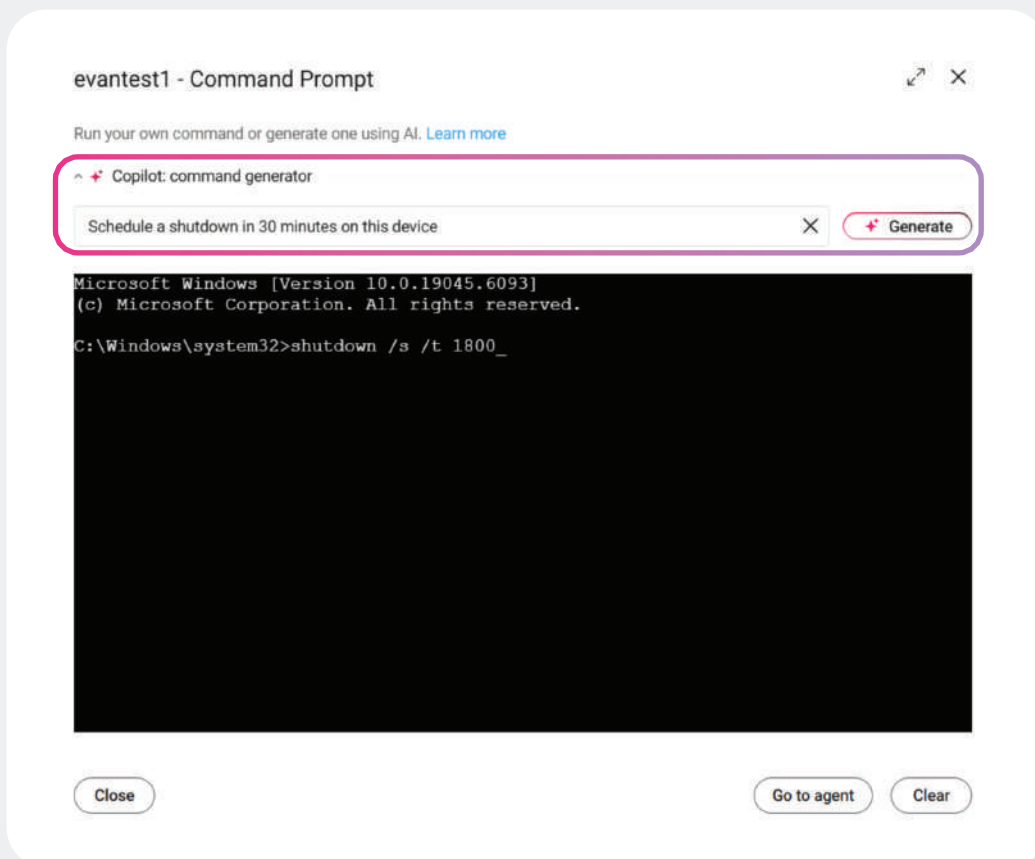
Schedule device shutdowns

In busy or multi-device environments, an ability to schedule device shutdowns helps ensure consistency, improves operational efficiency, and reduces the risk of security vulnerabilities from unattended machines.

Try instructing:

“Schedule a shutdown in 30 minutes on this device”

✦ AI Copilot provides the exact shutdown command, with the correct parameters already in place. You can run it immediately, reducing the chance of mistakes and saving time on repetitive system administration tasks.



Setting the standard for responsible AI in IT

The widespread adoption of generative and autonomous AI systems demands that the tech industry adopt strong internal security practices to safeguard users, systems, and data. As an innovation-first company, Atera aims to not only keep pace with leading companies in responsible AI development, but also set a new standard for the IT industry by embedding robust, transparent security principles into our AI.



Data privacy

Your data is exclusively yours. By hosting on Microsoft Azure OpenAI, Atera provides enterprise-grade security while ensuring your information is never shared with OpenAI or used to train external or internal models. All interactions and data remain strictly isolated within your own tenant, guaranteeing complete confidentiality.



Secure-by-design

Atera provides multi-layered security through a "secure-by-design" framework. Our AI agents execute only pre-vetted, low-risk actions, while administrators retain full control over enabling custom scripts or advanced functions. This proactive stance is reinforced by always-on content filters and a zero-trust architecture that guarantees your data remains strictly isolated.





Transparency and accountability

Atera eliminates the "black box" of AI by providing complete visibility and control. Every autonomous action taken by IT Autopilot is logged with the same traceability as a human technician, and all AI decisions are recorded as internal notes on the ticket. This gives your team a clear understanding of not just what the AI did, but why it did it.



Human-centric design

You are always in control. Atera's AI agents are designed to augment your team, with administrators governing all behavior through custom policies. Every AI-generated suggestion requires mandatory human approval before it is activated, ensuring that technology always serves your expert judgment.



Turn everyday tasks into quick wins

Many IT teams are only scratching the surface of what AI Copilot can do. Adopting a new way of working takes time, and it's not always clear where to start. This playbook was created to make that first step easy.

The best way to understand AI Copilot's value is to experience it in action. Try one of the examples in this playbook to see how quickly you can go from question to solution without the usual back and forth or manual digging.

The more you use AI Copilot, the more you will find ways it can save you time, reduce errors, surface insights you might have missed, and anticipate problems before they land in your inbox.

Leeds United Football Club



AI Copilot is like having another team member. Tickets have been reduced by 25-35% and it's assisting us with knowledge base generation."

Zack Barr, Service desk analyst

[Read customer story](#)

More resources to help you with ✨ AI Copilot



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Check our full Academy selection on AI Copilot:

[Watch academy course](#)