



Autotask Professional
Services Automation

Performance Analytics: Client Workbook User Guide

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Welcome!

Whether you are already using business metrics to help manage your business, or you are just beginning to realize the benefits of analyzing your business data, Autotask Performance Analytics (formerly Performance Dashboards) will make this task easier.

What is a Performance Analytics Workbook?

Every customer or potential customer, every ticket and project task, every sales opportunity and quote is stored in your Autotask database. Your database tells the story of your business. And as more business owners are realizing, this story can provide useful insights into how to make your business better.

Autotask Workbooks pull out the information you need, and presents it in an easy and accessible format.

- Each workbook brings together core metrics for one area of your business workflow to analyze your business's trends, successes, and challenge points.
- Workbooks present data visually so you can compare and analyze at a glance.
- Workbooks are easy to set up; simply open the workbook, enter the credentials provided by Autotask, and you're ready to go.
- Workbooks are even easier to use. Click one button to refresh data directly from pre-selected Autotask Performance Dashboards Data Cache and then start scanning the charts.
- Workbooks are portable; you can work anywhere. All you need is a computer that can open an MS Excel (version 2010 or greater) file and, to update your data, a network connection. And, workbooks are compatible with Share Point and Sky Drive.
- Workbooks bring together related data on one worksheet so you can easily compare relationships and trends.
- Workbooks have some basic features that any user can customize for their own business preferences.



Workbooks require access to the Workbooks Data Cache, a fee based service.

Ready to get your workbooks?

Autotask Performance Analytics workbooks are available through your Autotask Account Manager.



Workbooks are not supported on Macs. The MS Excel™ version for Macs does not support key Performance Analytics features.

Ready to set up your new Workbooks?

Go here: "Get Started with Performance Analytics" on page 3



Looking for information about a specific workbook?

If you are reading the **User Guide for a specific workbook**, click the link below to open a page in the Autotask Online Help where you can download a PDF User Guide for any workbook type.

[Download a Performance Analytics Workbook User Guide](#)

Need help from Customer Support?

Find out more here: "Contacting Customer Support" on page 47

Get Started with Performance Analytics

This section provides general information on the Performance Analytics Workbook requirements and how to configure your workbooks. For details on the tabs in a specific workbook, refer to the individual workbook information.

If you are reading the Performance Analytics: All Workbooks User Guide, use the links below to go directly to the individual workbooks.

If you are reading the User Guide for a specific workbook, click the link below to open a page in the Autotask Online Help where you can download a PDF User Guide for any workbook type.

[Download a Performance Analytics Workbook User Guide](#)

If you are using a printed copy of the User Guide, enter this URL into a Web browser's address bar to open the Help page: <https://www.autotask.net/help/Content/Reporting/AnalyticWorkbooks/PerformanceAnalyticsWorkbooks.htm>.

What You Get

When you sign up for Performance Analytics Workbooks, you will receive:

- A Performance Analytics Workbooks file for each workbook you signed up to receive
- Credentials to access the Workbooks Data Cache to download and refresh your data
- A sample PowerPoint presentation with charts that you can link to your service desk workbooks
- A User Guide in PDF format

Requirements

To use Autotask Performance Analytics workbooks, you need the following:

- Microsoft Excel™ 2010 or later running on a Windows operating system

The MS Excel version for Macs does not support key features of the Performance Analytics workbooks, for example, slicer filters.

- Workbooks Data Cache access credentials



Depending on your Autotask package, there may be a monthly fee to access the Workbooks Data Cache.

- Internet access when downloading and refreshing data.

Setting Up Your Workbook

When you receive your workbook files and user credentials from Autotask, you must configure each workbook separately.



There are currently several different Analytics Workbooks and workbook versions available. Your workbook may not have all the options described here. If you don't see an item on your Config page, you can move on to the next item.

To Begin

1. Copy all attachments from the email you received from Autotask to your local drive or network.

The email includes your credentials to access the Workbooks Data Cache: Database Server, Database Name, User ID, and Password.



Be sure to keep a copy of your credentials in a secure location.

2. Open a workbook file in Excel.
3. Click the **Config** worksheet tab.



Initial Setup and Configuration

Be sure to have the following Workbooks Data Cache credentials ready: Database Server, Database Name, User ID, and Password.

1. On the Config worksheet, click **Setup Workbook**.
2. Enter the credentials you received from Autotask exactly as provided by Autotask: Database Server, Database Name, User ID and Password.

Your connection information is case sensitive.

Use characters as specified by Provisioning. Do not leave empty spaces before, after, or within the specified characters.

If information is entered incorrectly, the setup will fail.

Autotask Setup

Connection Setup - Autotask Report Data Warehouse

Please enter the following information to connect to your Autotask database. This spreadsheet will be updated to connect using those details.

Database Server:

Database Name:

User ID:

Password:

Advanced Where:

FOR SALES WORKBOOK V 1.2 - You can store your connection credentials in a wbsetup.txt file. Future workbook updates will reference this file to load your credentials.

Set up the wbsetup.txt file as follows. Be sure to type the credentials exactly as provided by Autotask:



On line 1 of the file type your [Database Server]

On line 2 type your - [Database Name]

On line 3 type your [User ID]

Optionally, on line 4 type the [Password]

Save the files as wbsetup.txt **in the same directory as your Sales Workbook file**. The wbsetup.txt file must reside in the same directory as your workbook.

3. Optionally, enter an '**Advanced Where**' clause to selectively limit the amount of data that is downloaded. The number and type of advanced where clauses will vary depending on which workbook you are configuring. You can skip this field now and add an Advanced Where Clause at a later time. Refer to "Add or Update an Advanced Where Clause" on page 41.
4. Click **Next Step**. In the next minute or two (subject to connectivity and quantity of data), your workbook will:
Connect to your Workbooks Data Cache, download your site configuration and write it to the workbook.
Download the data required for the workbook, for example, ticket data for a weekly or daily service workbook.
Recalculate and update all workbook charts.
5. When the configuration and download are complete, complete the additional Config tab options described below.

Company Name

Enter your company's name in the **Company Name** field. This name will display on the Home page.



If you are configuring a Client Workbook, this name will also appear on your report covers.

Time Zone (Service Desk, Client, and Projects workbooks only)

Autotask stores all ticket detail dates in UTC. In order to see ticket create and complete dates in your time zone, you must specify that zone.

- Select the correct **Time Zone** and then click **Update Timezone**. Time zones are sorted by GMT +/- order.

Autotask Zone, Currency Symbol, and Fiscal Year (Sales workbook v 1.2)

Several Sales workbook tabs, for example, Forecast This Month, provide a list of the opportunities included in the tab data. In the list, you can click the item ID field to open the item's detail record in Autotask. To access the correct records, you must select your **Autotask Zone** here.

Your zone number appears in the base URL of you Autotask application. For example, if you access Autotask at <https://ww3.autotask.net>, your Autotask zone is 3.

Currency Symbol and Current Fiscal Year (Sales workbook v 1.2 and Financial only)



The **Service Desk** and **Client Workbooks** fiscal year is based on the calendar year. The Config page does not include a Fiscal Year option. If you need to change the fiscal year for a Service Desk or Client workbook, please contact Autotask Customer Support. Refer to "Contacting Customer Support" on page 47.

- To specify the currency symbol that will appear on graphs, metrics and tables, select a currency from the menu. Click Update.
- To specify the beginning date of your current fiscal year, select the month and year from the menus. Click Update.

Advanced Where Clauses

When you download data from the data cache, that download includes all data specific to your workbook for the current and previous year. You may not want to work with all of your data. Advance Where clauses let you limit the data by specific parameters. You can specify Advanced Where clauses when you complete your initial setup, or you can add the clauses at any time. Once added, the clauses will filter data when you refresh. For more details on Advanced Where Clauses, refer to "Add or Update an Advanced Where Clause" on page 41.

Save Your Password (Optional)

You can save your Workbooks Data Cache password rather than enter it every time you refresh your data.



Your password will be saved without encryption in Excel. If this is a security problem for you, do not use this feature.

For **each workbook**, do the following.

1. In your Workbook, click the Excel **Data** menu option.
2. Click **Connections**. The Workbook Connections window opens.
3. In the **list of Connections**, click the connection indicated below for the workbook you are configuring:

For the **Service Desk** and **Client** workbooks click "AT_Ticket_Detail_Data".

For the **Sales** workbook click "AT_Opportunity_Detail_Data".



4. Click **Properties**.
5. In the Connection Properties window, click the **Definition** tab.
6. Click the **Save Password** check box and then click **OK**.



When you click Save Password, a security message may open. To proceed and save your password without encryption, click Yes. If you do not want to save your password without encryption, click Cancel. You can then enter your password every time you refresh data.

7. For **Sales Workbooks**, only, return to the list of connections and click "AT_Opportunity_Detail_Closed".

Repeat steps 4 through 6 for the additional Sales related field.

8. For **all workbooks**, return to the **list of connections** and click "AT_WarehouseUpdate".
9. Repeat steps 4 through 6.
10. Click **Close**.
11. **Save** the workbook.

Refresh Data and View Your Charts

Once you have completed the initial configuration, you can begin to view your data.

For details on the individual workbooks, refer to [Using the Service Desk Workbooks](#), ["Using the Client Workbooks"](#) on page 9, [Using Sales Workbooks](#), [Using the Financial Workbook](#) or [Using the Projects Workbook](#).

Refresh Your Data

You can refresh your data daily. You will need a network connection to refresh.

Since the workbooks use only selected data, the data updates quickly.

1. Go to the **Home** tab in your workbook and click **Refresh Data**.
2. If you saved your password, you are done. If not, enter your password.



You will be prompted for the password twice. This is normal. Provide the password both times.

3. Once the refresh is done, save the file.



The refresh will not include any changes that were made to data items in Autotask Admin that are included in the workbook data, for example, queue names or priorities. To fully update your workbook after you make Administrative changes in Autotask, you must re-configure the workbook from the Config tab. Refer to ["Initial Setup and Configuration"](#) on page 4.



The Performance Analytics Workbooks are a unique subset of data and are not related to Autotask Report Data Warehouse. Autotask does not support any use of the Workbooks related data tables in a SQL reporting environment.

For more information on the workbook data, refer to ["About the Workbooks Data Cache"](#) on page 46.

There's More!

To learn about more options to customize your workbook, refer to ["Take Your Workbook to the Next Level"](#) on page 31.

Additional Help

If you need information that you cannot find in the Help, or you have experienced a workbook related technical problem, please contact Autotask Customer Support. Refer to ["Contacting Customer Support"](#) on page 47.

Using the Client Workbooks



It's your job to keep your clients' networks up and running, their hardware functioning with minimal downtime, and their software current and configured to their needs. When you continually meet your SLAs, provide proactive maintenance, and especially when you manage remotely, your clients' businesses run smoothly, their employees are more productive, and their managers are satisfied.

But sometimes, when you do your job well, your clients may not realize just how much you do. So, when they audit their costs and plan their budgets, they may wonder about the money they pay to your company.

Now, you can show your clients what you do in one professional, accessible, and attractive report. Like the service workbook, the client workbook draws directly from your Autotask database so you have the latest information. The client's data appears in colorful, easy to read graphs with useful insights for each graph. You decide what each client needs and wants to know, and your company's name goes on the report cover.

Best of all, Autotask's Client Workbook reports are easy to produce.

Easy to Produce Reports

You start by setting up your workbook configuration settings in the same way you set up your Service workbook. Then refresh your data and go to the Explore tab.

From the Explore tab, you select the account for which you want to generate the report, and you select filters to determine what data will go into the report. There are up to ten different filters including type of support (Group), date, issue type, even resource.

Click on any tab to see how the graphs look. When you're satisfied, just click Create Client Report, specify which tabs you want to include in the report, and then generate the PDF. You can even generate a report for every client in one batch.

You can then attach the electronic file to an email, or print it and present it to your customer.

Refer to "Setting Up and Running a Client Report" on page 12.

Your Top Clients

Although any of your clients might appreciate a custom report about the work you do for them, the report information becomes most useful for high volume clients. The Client workbook includes a Top Accounts tab so you can easily see which clients produce the highest volume in tickets and hours worked.

Cover Page and Table of Contents (TOC)

The Cover Page tab displays the report cover page. The cover displays the company name that you enter in step 2 on the Config tab. To add a name, click the Config tab and follow the instructions. The "Prepared for: " name is inserted when the report is generated. Refer to "Setting Up and Running a Client Report" on page 12.

The TOC tab lists the seven sections of the report. When you run the report, you can choose which sections to include. Refer to "Setting Up and Running a Client Report" on page 12.

Include Up to Seven Types of Service Data

The seven sections in the Table of Contents come from seven different worksheet tabs. Each worksheet contains multiple graphs related to one type of service data.

You can decide which worksheets to include. For example, if your customer is not interested in service details about configuration items, simply leave the Config Items section out when you run the report.

New Tickets

This tab includes 17 graphs that provide your clients with a data on the new tickets you are creating for them. Refer to "New Tickets Report" on page 16.

Completed Tickets

The 5 graphs on this tab show your client how many tickets were completed during the specified time period and they provide details like hours worked and which of the client's resources initiated the tickets. Refer to "Completed Tickets" on page 21.

SLA First Response and SLA Resolution

These two worksheets each display 5 graphs that show your client how well you're meeting your SLA first response and resolution targets. Refer to "SLA First Response and SLA Resolution" on page 23.

Surveys

Is your client participating in your client surveys? If so, you can show them how well you're doing. Refer to "Survey Results" on page 26.



Contacts

This worksheet displays 3 graphs that show the client's employee participation in ticket creation. Refer to "Client Contact Participation" on page 28.

Configuration Items

Do you track configuration items for some or all of your clients? If so, you can include a section in your report that provides details on tickets associated with different configuration item types. Refer to "Configuration Items" on page 30.

Edit the Graph Summary Explanations

If you want to change the content of the summary explanations that appear under your graphs, you can do that on the Graphs Explanation page. Refer to "Setting Up and Running a Client Report" on page 12.

Setting Up and Running a Client Report

Your Client Workbook uses your Autotask ticket data from the 100 days previous to the most recent data refresh.

Before you generate reports:

- New users should make sure that the **Config tab** for the Client workbook has been configured. You can follow the instructions on the Config tab, or refer to "Get Started with Performance Analytics" on page 3.
- Make sure your workbook data has been refreshed. If not, click **Refresh Data** on the Home page. A network connection is required.



When you refresh data, if the password was not saved with the workbook, the process will ask for the password twice. This is normal. Please provide the password both times to make sure all data is refreshed properly.

For details on saving the password, see Step 4 on the Config tab.

- Set up an Output folder where the PDF output will be created. The workbook specifies a default output folder C:\clients-reports. You can create that folder, or a different folder.

If you use a different output folder, you must update the Output Folder field in the Create Client Service Report PDF window when you run your reports. Refer to "Generate the Final PDF File" on page 13.

Set Up the Report

To set up reports, go to the **Explore** worksheet.

Select the Account

To generate a report for one client, click to select that client from the Account list.



Notice that when you select one or more accounts, the data in the Selected Tickets box updates. You instantly know how many tickets for the selected Account are included in the current data load.

Selected Tickets	
Number of Tickets	4
Worked Hours	3.75

To select multiple accounts, Ctrl + click the name for each account you want to include.



You can use the multi-account selection option to generate a single (combined) report for all selected accounts. This is particularly useful when you need an aggregate report of multiple franchises.

Set Up the Filters

Most customers will want to see the big picture, so be sure to re-set all of your filters before you run those reports. But, if you want to focus your report on specific aspects of your work for the client, use the additional filters to limit the tickets to specific criteria. You can filter by survey or no survey, SLA goals, and a number of ticket settings including ticket Priority, associated Configuration Item Type, Status, Issue Type and Queue. For example, you might want to limit report data to tickets created for, and number of hours spent on, Managed Services, since this work is not always visible to the client.

You can even filter by ticket Resource. This could be handy if your customer ever wants to know who was assigned to certain jobs.

To use the filters:



For filters with longer lists of items, use the scroll bar to view the entire list.

- Click to select an option in the filter list.

To select multiple options, Ctrl + click multiple non-adjacent options in the list.

To select multiple adjacent options, click an option then Shift + click another option to select both options and all items between them.

- To clear filters, click the filter icon next to the filter name.



Select another tab at any time while you are selecting your filters to see how the data appears in the graphs.

Review the Graphs and Decide Which Tabs to Include

When you have selected the client and the data on which you want to report, review the charts on different tabs. Make sure you see the data you want.

This is a good time to make note of which tabs you want to include in your report output. When you click to run the report, you will have the opportunity to select which tabs should appear in your final report.

Generate the Final PDF File

When you have everything set -

1. Click Create Client Report.

The Create Client Service Report PDF form opens.



2. Complete the form as indicated in the following table.

Task	Description
Output Options: Select whether to create a single report or a batch of reports	<p>Select an option.</p> <p>Single Client Report: This option generates one client report. If multiple clients are selected, the report includes the data from all selected clients and you must enter a name in the Client Name field.</p> <p>Batch of Client Reports: This option generates a report for each of your clients, regardless of how many clients are selected. Each report includes only that client's data.</p> <p>Batch of Resource Reports: This option generates a report for each of your resources, regardless how many resources are selected. The report includes only the data from tickets that meet the search criteria and are assigned to the resource.</p>
Client Name: When needed, enter the name that you want to appear on the report cover	<p>The name that appears on the report cover:</p> <p>Automatically populated when you select a single client and then select single client report.</p> <p>If you select multiple clients and attempt to generate a single client report, you must enter a name.</p> <p>Not required for batch report options. Each report cover will display the Client name as it appears in the Account list. For resource reports, the cover displays the resource name.</p>
Output Folder: Specify where the PDF file should be created.	<p>This field is Automatically populated with the file path C:\clientreports. The workbook does not create this directory. You must add it or specify a different Output folder.</p> <p>PLEASE NOTE: If the specified directory does not exist, you will get an error when you run the report.</p>

Task	Description
Report Sections: Select the content of your report.	Select or clear check boxes to build your report. There is a check box for each worksheet that you can include. When a check box is selected, that worksheet appears in the report.
Create Report or Close	Click Create Report to generate one or more reports. You will find the finished PDF reports in the directory folder specified. When you are done with this window, click Close

3. Review your final report.
4. Attach the PDF file to an email, or print it.

Changing the Graph Summary Explanations

Be sure to save a backup copy of your workbook before you make any changes.

Most of the graphs in this workbook provide a summary description. Some also include insights about your client's relationship with your business. This text is set up on the **Graph Explanations** tab.

Many of the graph summaries are set up with formulas that pull data from the associated chart and from other cells in the Graph Explanations spreadsheet. Some of the cells contain only text.

You can easily edit the cells that contain text without affecting the formulas. You can, if you wish, replace the formula in the Graph Summary Formula cells with plain text. If you do so, the explanations will lose their calculated figures.

New Tickets Report

The 3 page New Tickets report includes 17 graphs. These graphs show the client not only how many new tickets were generated in the specified time period, but they also break the information down into four areas: when the tickets were created, who created them, how they were created (for example email or phone), and what types of tickets were created.

When were your tickets created?

When were your tickets created?

NEW TICKETS BY CREATE WEEK

Week	Tickets
13-06-30	11
13-07-07	13
13-07-14	11
13-07-21	130
13-07-28	107
13-08-04	48
13-08-11	83
13-08-18	67
13-08-25	88
13-09-01	73
13-09-08	167
13-09-15	208
13-09-22	163
13-09-29	181
13-10-06	140

NEW TICKETS BY CREATE DAY

Day	Tickets
1 Mon	169
2 Tues	555
3 Wed	257
4 Thur	204
5 Fri	143
6 Sat	95
7 Sun	95

It's important know how your tickets are trending and why.

On which day of the week do you submit the most tickets? We use this data to properly staff for expected high traffic days. Demo IT Service Company receives the most tickets on Tues.

TICKETS BY CREATE TIME OF DAY

Time of Day	Tickets	Percentage
1 Morning	196	13%
2 Afternoon	656	45%
3 Evening	245	16%
4 Overnight	394	26%

DISTRIBUTION BY CREATE TIME OF DAY

What time of day are most tickets created? Demo IT Service Company receives 52.8% of tickets outside of normal business hours.

Were there certain weeks with more after-hour work? How is it trending over time?

TICKETS BY MOST ACTIVE CREATE DAY/TIME

Day/Time	Tickets
Tues 14:00	96
Tues 15:00	75
Tues 11:00	57
Wed 14:00	54
Tues 15:00	51
Tues 12:00	50
Thur 14:00	49
Tues 10:00	48
Mon 14:00	35
Fri 14:00	33

TICKETS BY CREATE DAY/TIME OF DAY

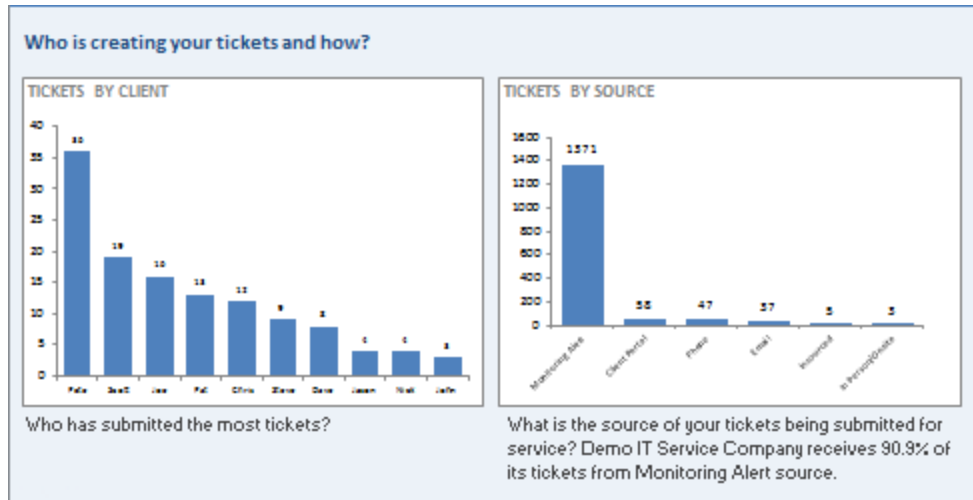
What hours during the week do you submit the most tickets? Demo IT Service Company is busiest on Tues 14:00.

This chart shows you the time of day that you have submitted tickets for each day of the week.

Your clients can quickly learn the following information about how many tickets were submitted and when:

- How many tickets did they submit in the previous weeks; was the amount steady, or were there spikes and dips?
- How many tickets did they submit during different times of day, including in the evening and over night?
- What was their ticket creation count by day of the week?
- What was their ticket creation count by creation time for the days of the week?
- What is the distribution of ticket creation at different times of day over a period of weeks?
- What days and times do they create the most tickets?
- How many tickets did they create during different time periods for each day of the week.

Who is creating your tickets and how?

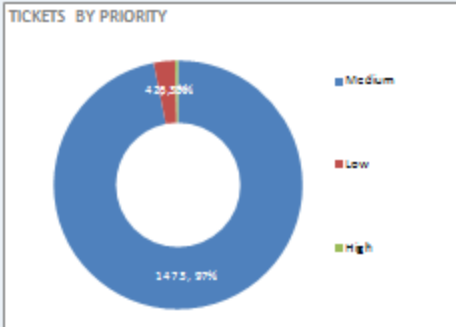


Here your clients can learn which members of their team submitted tickets, and who submitted the highest count. They can also learn how their company is submitting tickets.

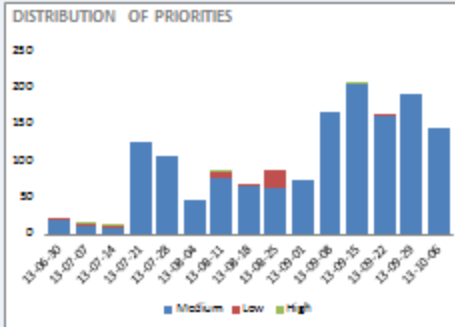
What types of tickets are being created?



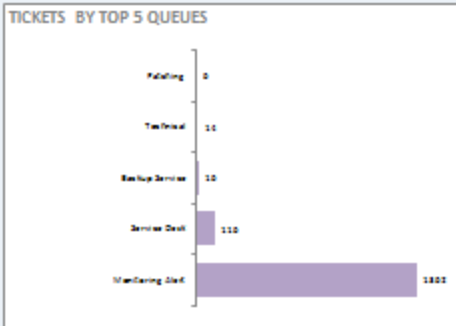
What type of tickets are being created?



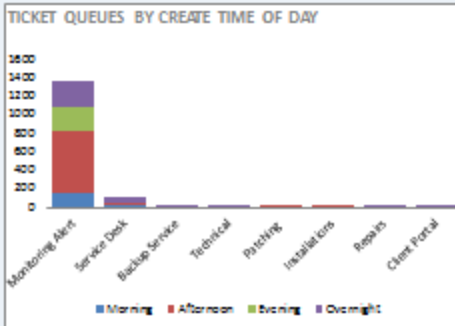
What is the priority of your tickets? Demo IT Service Company receives over 97% of it's tickets with a status of Medium.



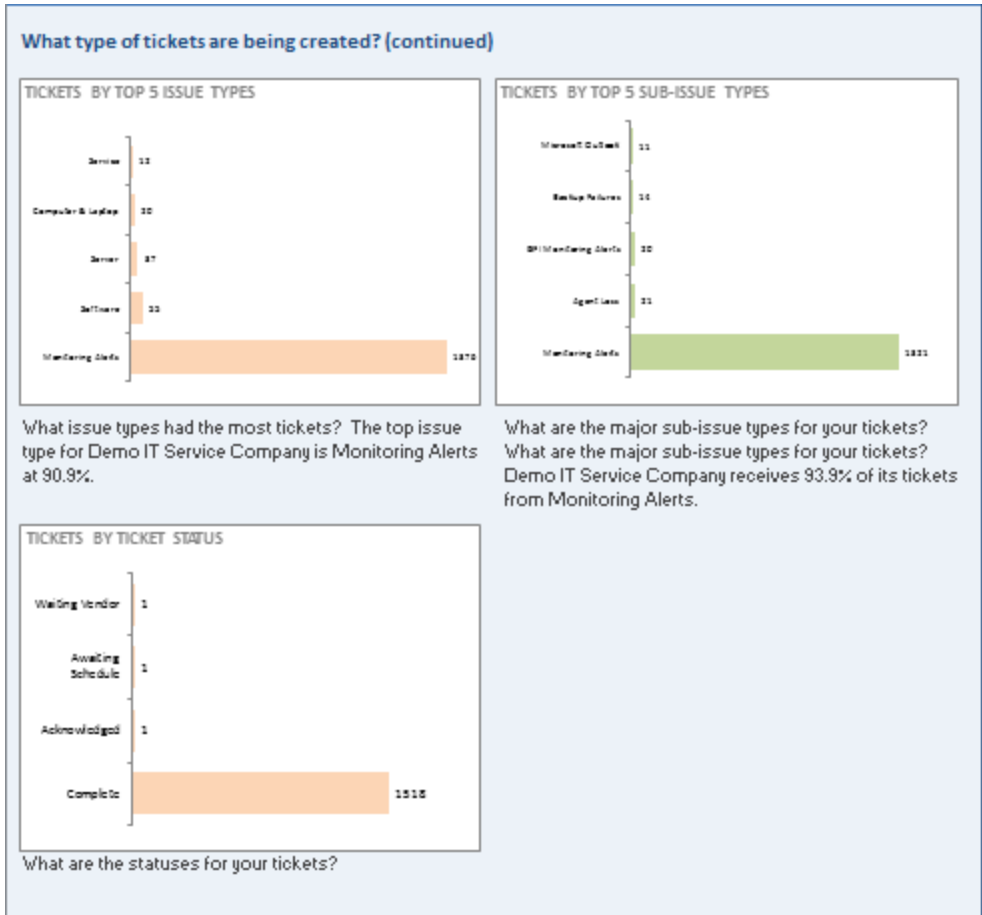
Were there weeks which had a spike in higher priority tickets? Has the priority of tickets been stable over time?



We assign tickets to queues to ensure that are efficiently processed. Based on the assigned queue, the appropriate resources are assigned to address the issue.



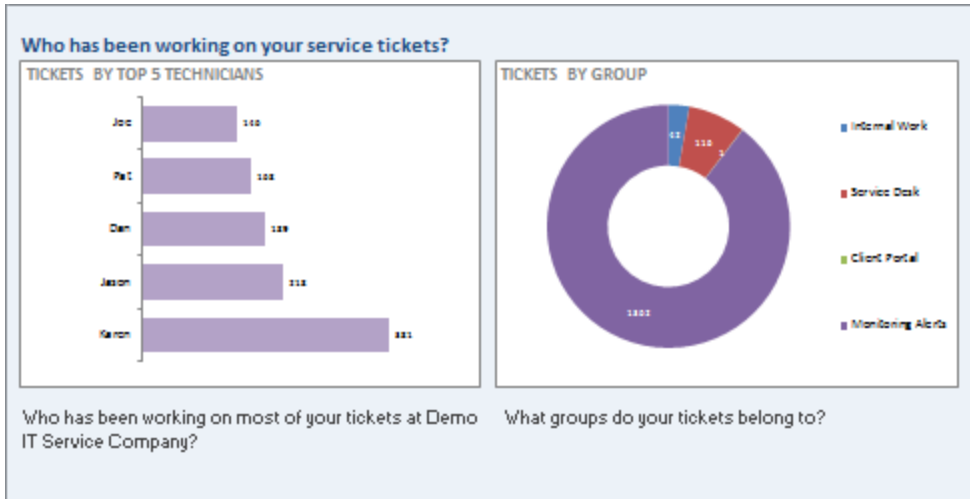
What time of day were tickets created for certain queues? Most of the evening and overnight tickets typically associated with monitoring or maintenance activities.



Your client should know what types of tickets you are working on for them. These charts can show them the following:

- What are the priorities of their new tickets? Do they have a lot of High or Critical priority tickets?
- Do the priorities remain the same over time, or were there periods where there was an increase or decrease in certain priorities?
- In which queues are the new tickets? This is especially useful if your company uses descriptive queue names.
- Are more tickets created for certain queues at certain times of the day?
- What are the top 5 issues and sub-issues for which the new tickets were created?
- What is the current status of the new tickets? This helps the client see what progress is being made on all those new tickets.

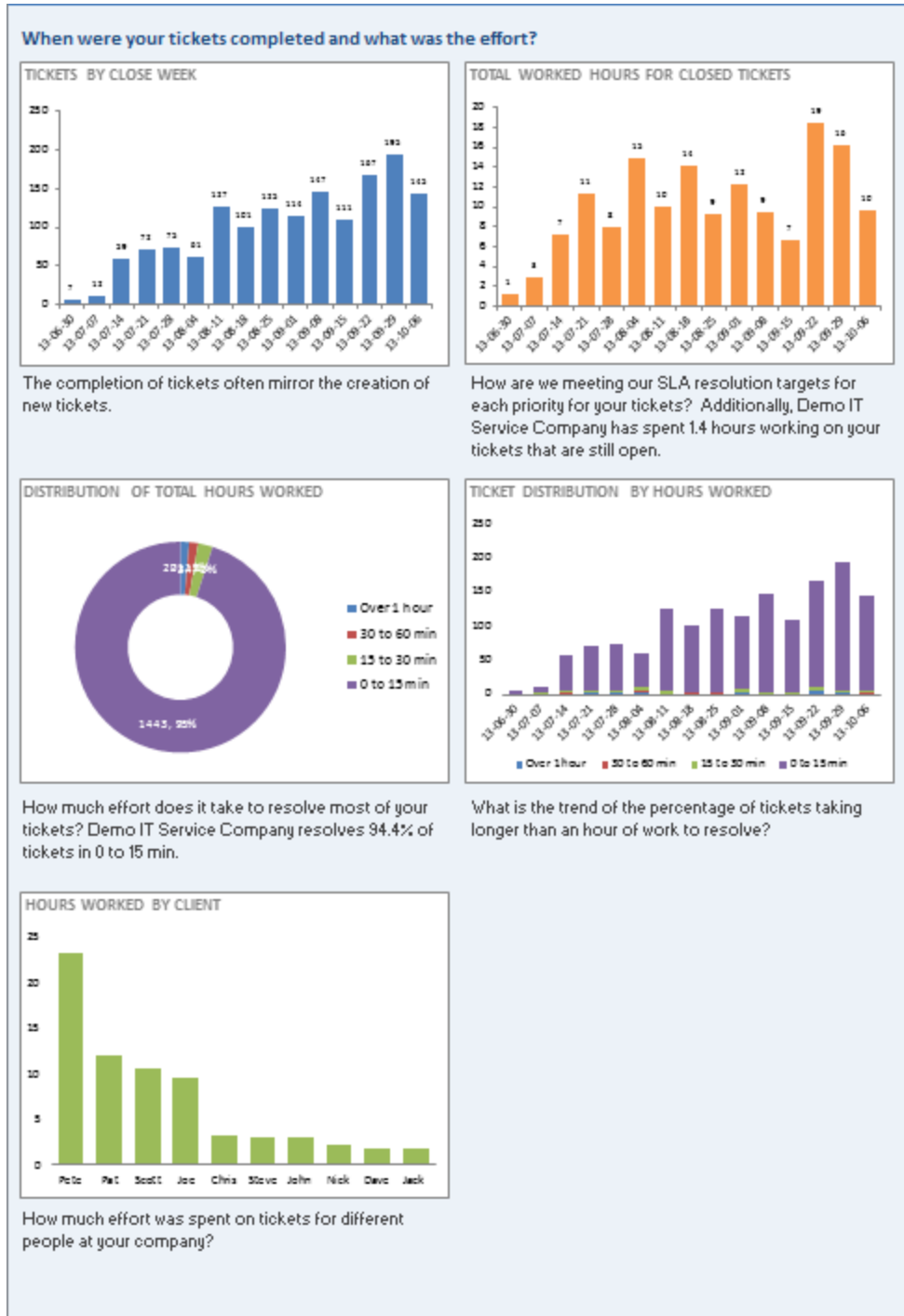
Who has been working on your service tickets?



Your clients can learn the following information from these charts:

- The 5 employees in your company who are assigned to the highest number of the client's new tickets.
- The groups, or teams, that are responsible for their new tickets, and how many tickets are assigned to each group.

Completed Tickets



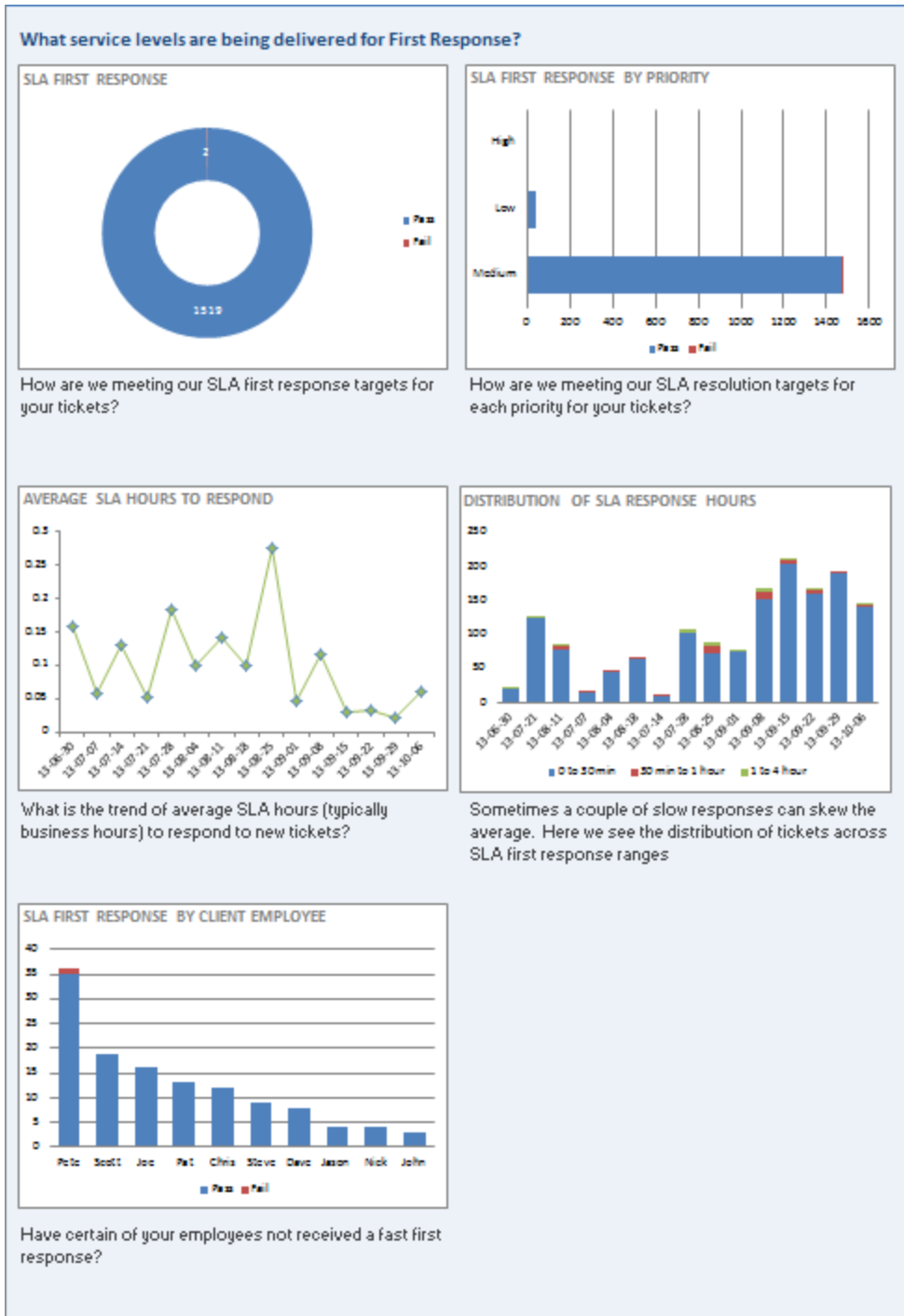
It is important for your clients to be able to easily see how many tickets you are completing for them, and how many hours of work went into those tickets. With the 5 graphs in this report, the clients can see that basic information and they can learn the following:



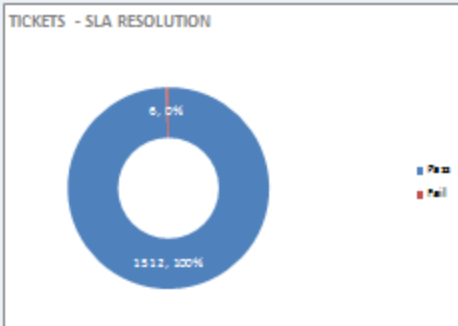
- How many tickets were closed in each week covered by the report?
- How many hours were worked on closed tickets during those weeks?
- Of the total number of hours worked, how many tickets were closed in less than 15 minutes, between 15 and 30 minutes, between 30 minutes and one hour, and how many tickets took more than one hour to close?
- How many hours were worked per ticket each week?
- How many hours were worked on tickets submitted by different people at the client's company?

SLA First Response and SLA Resolution

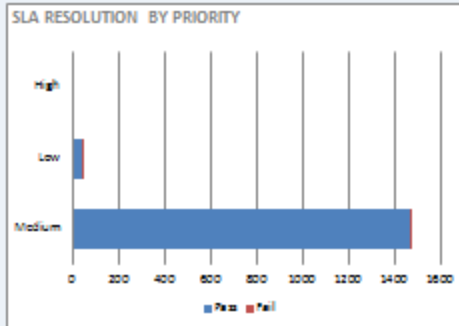
These two worksheets, SLA First and SLA Resolution, each display 5 graphs that show your clients how well you're meeting your SLA first response and SLA resolution targets.



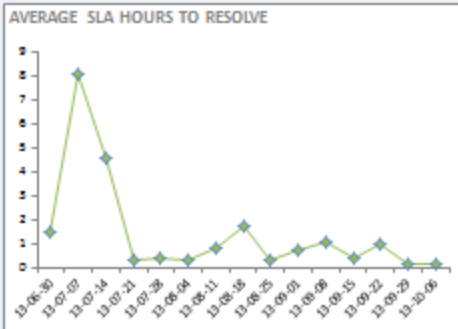
What service levels are being delivered for Resolution?



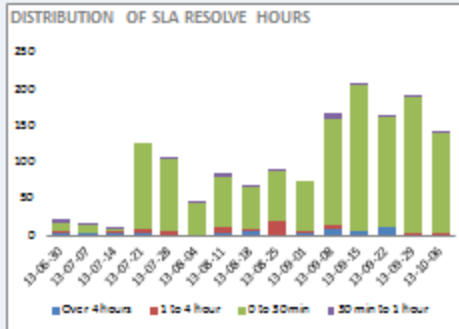
How are we meeting our SLA resolution targets for your tickets?



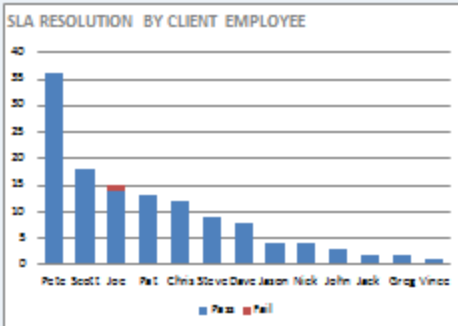
How are we meeting our SLA resolution targets for each priority for your tickets?



What is the trend of average SLA hours (typically business hours) to resolve tickets?



Sometimes a couple of slow resolutions can skew the average. Here we see the distribution of tickets across SLA resolution ranges.



Have certain client employees not received a quick enough resolution?

Not only do clients quickly see how many of your tickets met these key targets, they also learn more details:

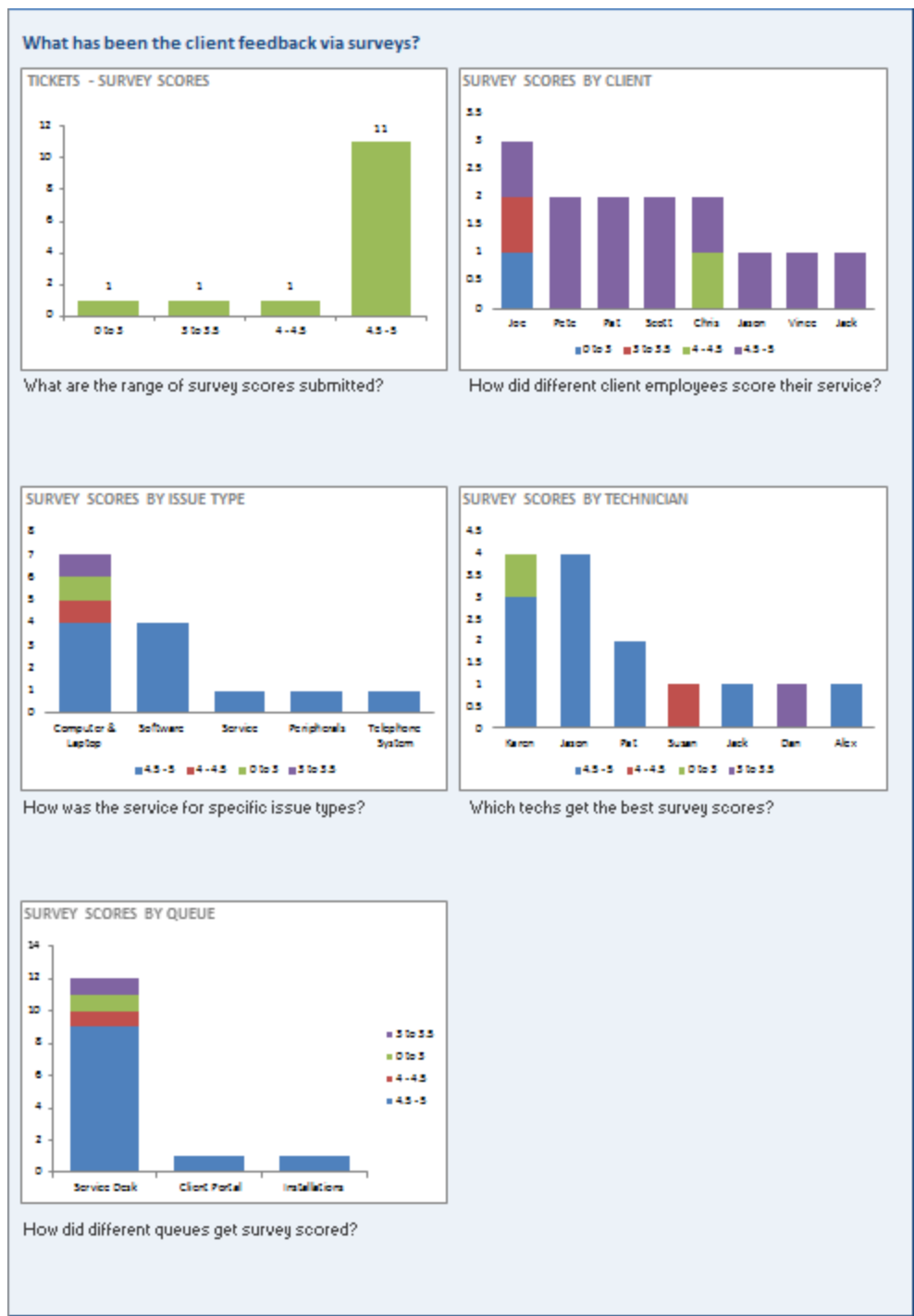
- How well your company met SLA targets for different ticket priorities.
- The average number of hours spent to meet the SLA first response or resolution targets during the weeks covered by the report.



- The number of tickets in each week that met target within 30 minutes, between 30 minutes and 1 hour, and between 1 and 4 hours, and how many tickets required over 4 hour to meet target.
- The number of tickets submitted by each client team member that met their first response or resolution targets.

Survey Results

Is your client participating in your client surveys? If so, these 5 graphs can show them how well you're doing.



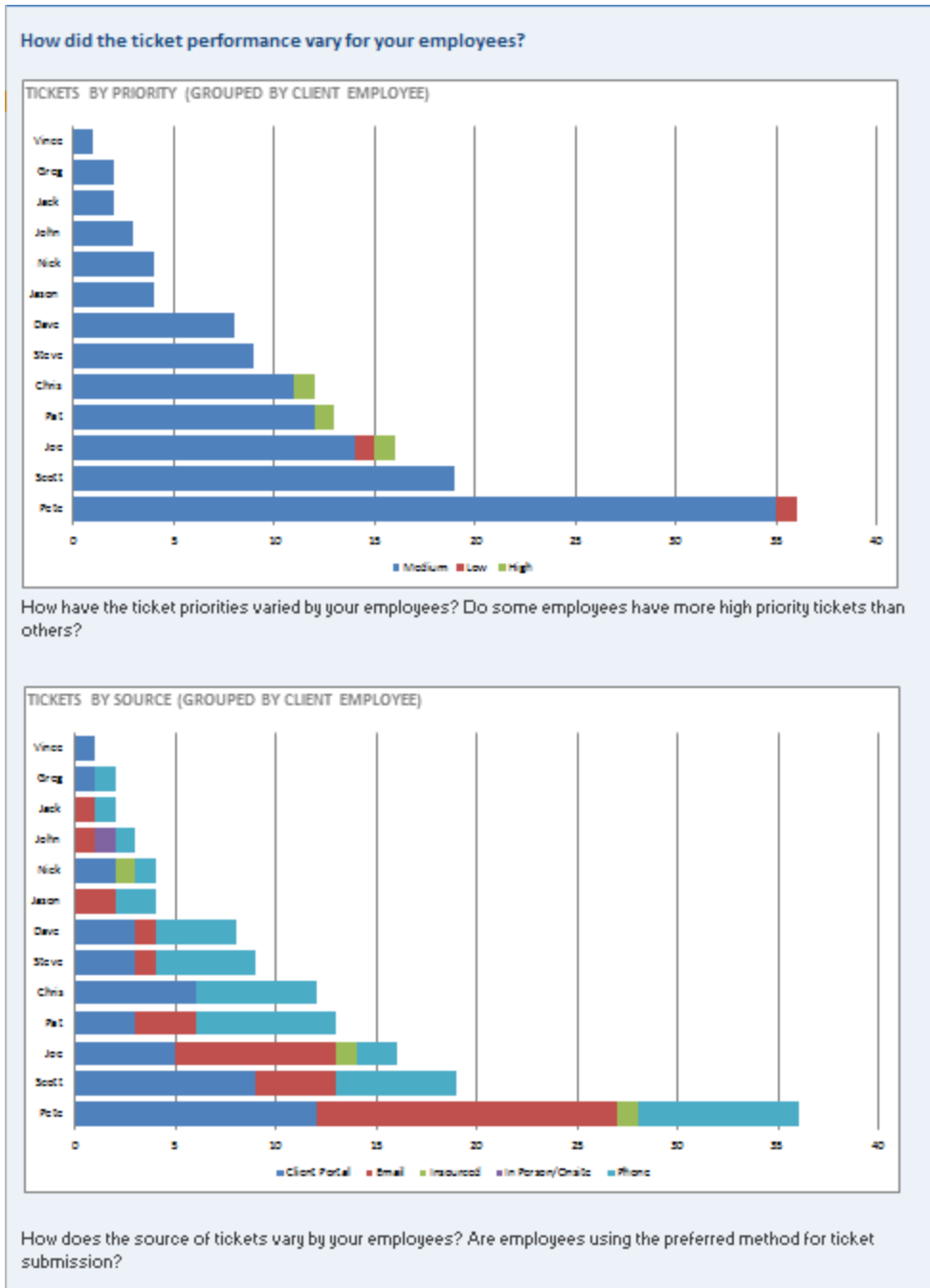
If you send Autotask surveys to your clients when you finish a job, this report can give them a quick look at what their employees think of your company. Along with your overall scores, the client can also learn the following:

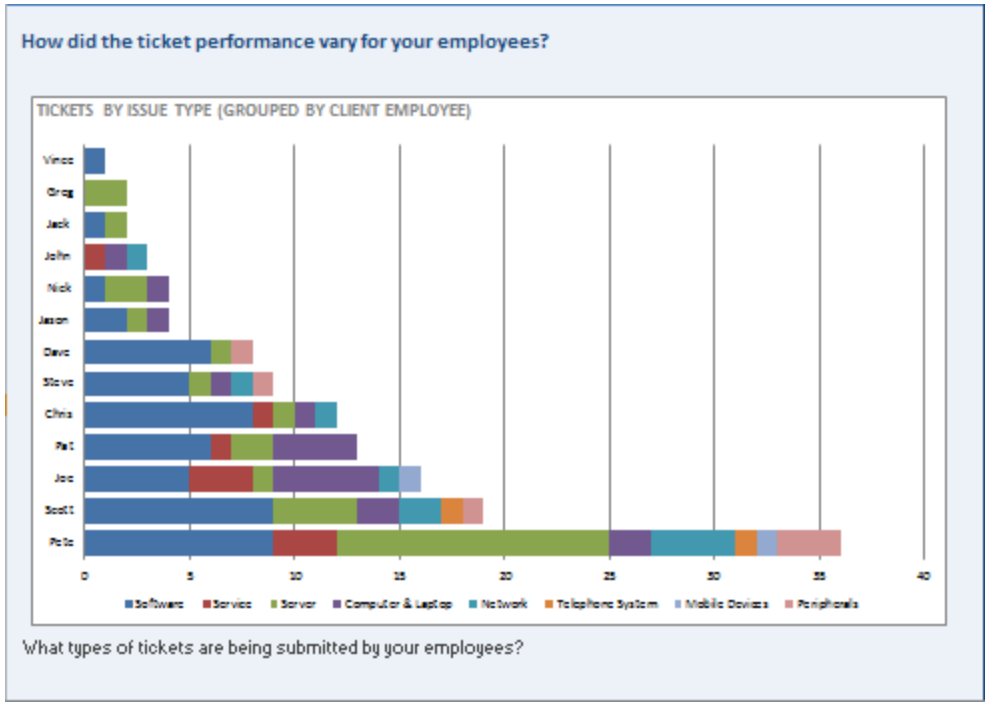


- How each client team member rated their experience with your company
- How well your company was rated for handling specific issues
- How well your employees were rated by the client team members
- How tickets work was rated for tickets from different queues

Client Contact Participation

Do you think your clients would like to know more about what impact their employees have on ticket creation? If so, you'll want to include the 3 graphs in this section in your client reports.



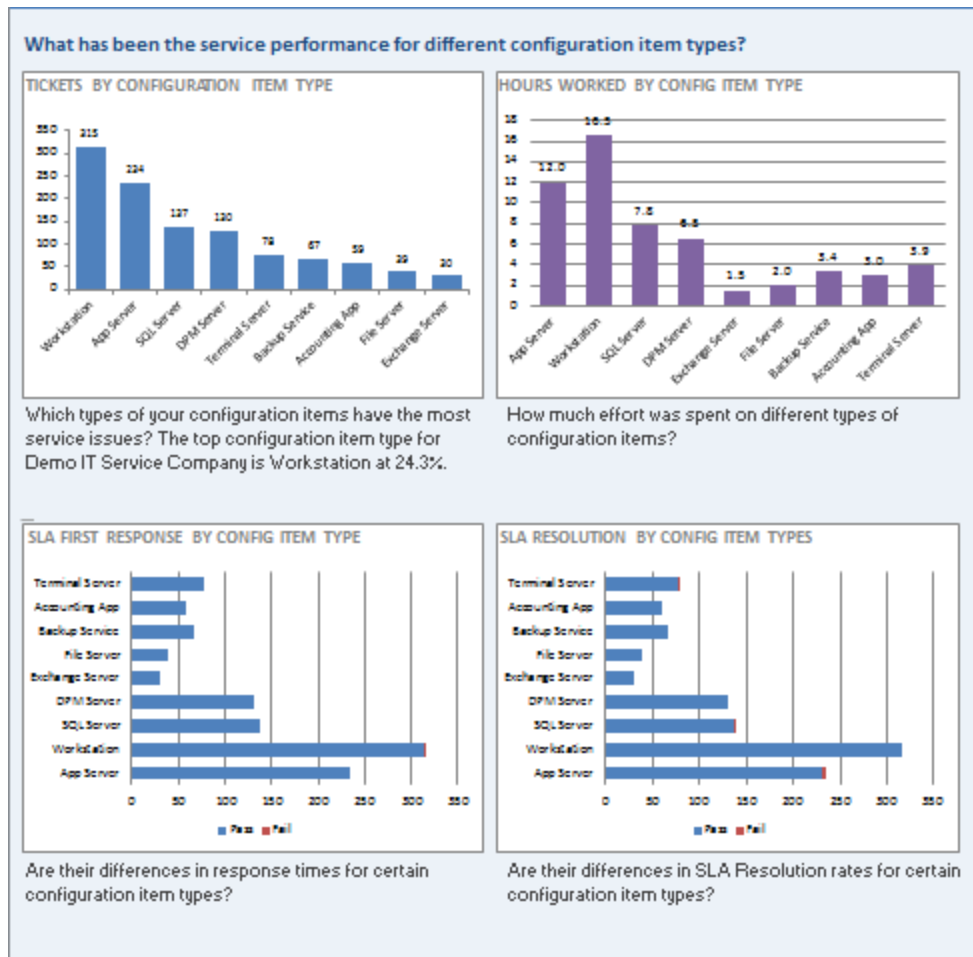


Not only can clients see which of their employees are submitting tickets and how many, they can also learn:

- What priority tickets the different employees are submitting
- What method employees use to submit their tickets
- The different issue types for which employees submit tickets

Configuration Items

Do you track configuration items for some or all of your clients? If so, you can include a section in your report that provides details on tickets associated with different configuration item types.



The first graph on the page simply shows the count of tickets created for configuration item types. The three additional graphs show your client the following details:

- The number of ticket hours worked for the different configuration item types.
- Whether you met your SLA first response target for the configuration item types.
- Whether you met your SLA resolution target for the configuration item types.

Take Your Workbook to the Next Level

Once your workbook is configured and you're comfortable refreshing the data and working with the tables, you can try some of these features to make your data analysis even easier.

Before you customize...

Save a backup of your original workbook. Even experienced Excel users can accidentally make a change that cannot be corrected. **Autotask will not be responsible** for the results of any changes you make to your original workbook.

Customize Groups (Optional)

Some workbooks are configured with a specific set of groups. Service Desk workbook groups are based on your Service Desk queues. Sales workbook groups are based on Sales Teams. You can give the groups in either workbook custom names directly in the Config tab worksheet under Step 4 Custom Groups.

The Sales workbook Config tab also allows you to set up groups for smaller subsets on the Forecast tabs. Double click in a field in the Opportunity Stage Name column and enter your name for the custom stage group.

If you want to base your groups on something other than the default configuration, please contact Autotask Customer Support for assistance. Refer to "Contacting Customer Support" on page 47.

Share Workbook Charts in PowerPoint™ Presentations

You can easily use PowerPoint presentations to share the insights you gain from your workbooks. Simply copy and paste workbook charts into the presentation slides. And, to be sure your data is always current, you can paste the charts as linked objects. Then, before you present, simply refresh your workbook data and then update the links in PowerPoint. Your presentation data is current every time you present, without spending hours updating content.

To get started, you can use the sample presentation you received from Autotask. You can also add additional charts to the sample presentation or to your own presentation.

Refer to "Add Linked Charts to PowerPoint Presentations" on page 32.

Customize Your Workbooks

The formulas and ranges in your workbook were carefully designed to present key workflow data in a clear and useful display. Experienced Excel users may want to make adjustments to the appearance of the charts and the data presentation. And even inexperienced Excel users can make some simple changes to adapt the workbook to your business needs. Refer to "Customizing Your Data Display" on page 34.

Add Linked Charts to PowerPoint Presentations

You can copy and paste workbook charts into a PowerPoint presentation and link the charts back to the workbook. Then, you can update the linked charts with current data from the workbook. To help you get started, Autotask has provided a sample presentation file, Executive_Meeting.pptx, which contains charts from the Service Desk Weekly workbook.

This topic describes the following tasks:

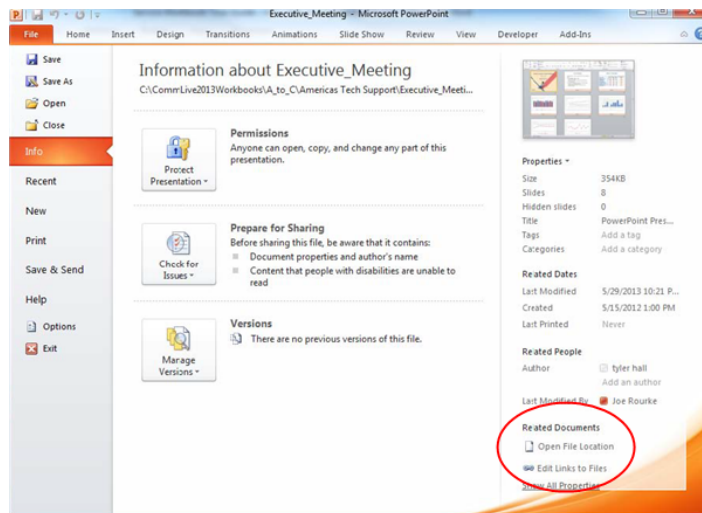
- How to link the charts in the sample presentation to your own workbook.
- How to add additional linked charts to the sample presentation or to your own presentations.
- How to update charts in your presentation.

Using the Executive_Meeting PowerPoint File

You can use the sample PowerPoint presentation provided by Autotask as the basis for our own presentation. Your provisioning package included a sample PowerPoint presentation with linked charts and tables from the Service Desk Weekly Analysis workbook. You can use one or more pages from this PowerPoint to create your own presentation and, if you like, add additional charts.

Before you use the presentation, you must update the links for your own directory structure. The presentation links must point to the current location of the workbook.

1. Open the Executive_Meeting presentation in PowerPoint.
2. Click the File tab, and then click Edit Links to Files, located under Related Documents on the right side of the page.



3. In the Links window, select an individual link and click Change Source.
4. Locate the Service Desk Weekly workbook in its current location in the directory.
5. Double -click to select the workbook file and close the directory window.



6. Repeat steps 3 through 5 for each chart link that you want to update.
7. Close the Links window.



If you move the Workbook or PowerPoint file from its current location, you will need to repeat this process to maintain the links.

Adding Charts to Any PowerPoint Presentation

1. Save your workbook.
2. In your workbook, find and click on the chart that you want to copy to PowerPoint.
3. From the Home tab, click the copy icon and select Copy.
4. In your PowerPoint presentation, open the slide to which you want to add the chart.
5. From the PowerPoint Home tab, click Paste and select a paste option: click "Use Destination Theme & Link Data" to update the formatting to match the presentation formatting, or click "Keep Source Formatting and Link Data" to maintain the formatting from the spreadsheet.
6. Save the PowerPoint.

Updating Presentation Data

To **update** the charts in your presentation:

1. Open the PowerPoint.
2. Select the chart to update.
3. Locate Chart Tools on the ribbon and select the Design tab.
4. Click Refresh Data.

Customizing Your Data Display

Because Autotask Performance Analytics Workbooks are based on Microsoft Excel, you can make adjustments to the appearance of the charts and the data they contain. This topic and related topics provide basic information to help you make simple changes to your workbooks. Please be sure to read "**Before you customize...**", below.

Before you customize...

Save a backup of your original workbook. Even experienced Excel users can accidentally make a change that cannot be corrected.

Autotask will not be responsible for the results of any changes you make to your original workbook file.

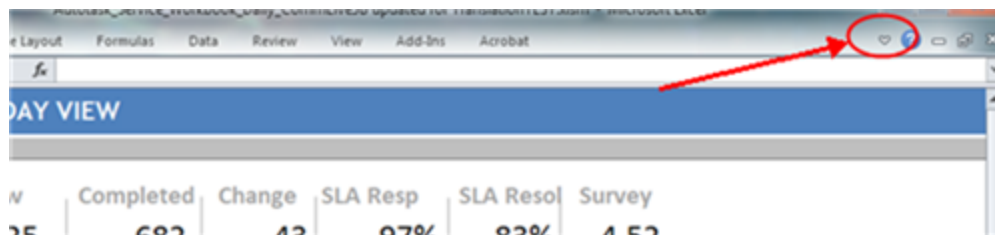
One more important note:

The formulas used in your workbook are often complex. We strongly recommend that you do not edit formulas and ranges unless you are an advanced Excel user.

Displaying and Hiding the Excel Menus and Ribbon

When you first open your Analytics Workbooks, the Excel ribbon that contains the tools needed to edit the worksheets is hidden. Most of the modifications described here require the ribbon.

- To display the ribbon and keep it open until you choose to close it, click the small down arrow icon on the far right of the menu bar.



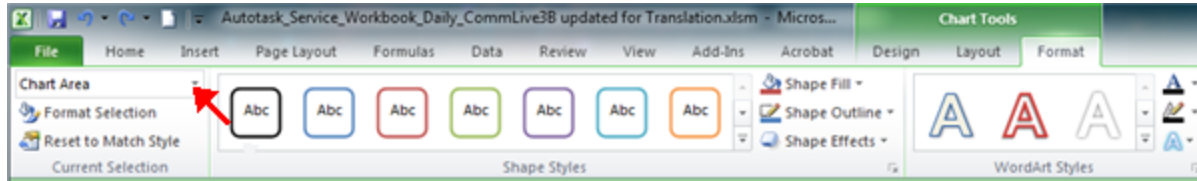
- To hide the ribbon, click the arrow again.

Change the Appearance of Your Charts

You can make simple changes to chart style, colors, and labels as you would with any Excel spreadsheet. Even with simple format changes, **save a backup of your original workbook.**

Using the Ribbon Tools

- Click to select a **chart** or an element in the chart.
The Chart Tools tab appears in the Excel ribbon.
- Select the **Format**, **Design**, or **Layout** tab.
- In the **Layout** or **Format** ribbon, in the **Current Selection** area, select the element of the chart you want to format from the menu.



This menu does not appear in the Design ribbon.

4. Make changes as needed.
5. Save.

Using the Right-click Menu

1. Right click in the chart or on a chart element.
2. Select the formatting option you need, for example, Change Chart Style or Format Chart Area.
3. In the format window that opens, make selections and changes as needed.
4. Save.

For more details on formatting options for Excel spreadsheets, please refer to Microsoft training information: [Microsoft Office: Change the format of Chart Elements 2010](#).

Changing the Labels and Content for Metrics that Matter

The Service Desk, Sales, Projects and Financial workbooks each provide a collection of key metrics called Metrics that Matter.

Service Desk Workbooks

In the Service workbooks, the Metrics workbook tab displays a table of 10 key service metrics for the current week or day, the previous week or day, and two previous weeks or days. Each metric displays two sparkline graphs and the final column displays the target set for that metric.

Sales Workbook

In the Sales workbook, the Metrics that Matter appear only on the FY Current (Fiscal Year Current) tab. Selected metrics also appear at the top of several other tabs.

Financial Workbook

In the Financial Workbook, the Metrics workbook tab displays up to 14 different key metrics. The workbook ships with 13 metrics selected to give you a quick view of the financial health of your company, including data for a specified month and year to date, indicators to flag metrics that have not met their targets, and sparkline graphs to show a month to month comparison.

Projects Workbook

Similar to the Service workbooks, the Projects workbook displays 10 key metrics for the current week, the previous week, and two weeks before the current week.

For All Workbooks

For all workbooks, the Metrics that Matter data is driven by the current year data Analysis tabs (for Service Desk, the **Ticket Analysis** tab; for Sales, the **FY Current** tab; for Financial, the **FinancialsCurrent** tab; and for projects, the **Task Analysis and Projects Analysis** tabs). Each of these tabs can be updated in the same way. The examples here are based on a Service Desk workbook Ticket Analysis tab, but the instructions can be applied to the other Analysis tabs.



The formulas used in some cells of the data analysis tabs have been carefully constructed and are often used to calculate values in other cells. We do not recommend changing formulas unless you have a high level of experience working with formulas in Excel.



Make a backup of your workbook before changing data. **Autotask will not be responsible** for the results of any changes you make to your original workbook file.

Service Desk Ticket Analysis									
	Met Target	Week Trend	Current Week	Last Week	Prev Week	Last 4 Weeks	Prev 4 Weeks	10-Mar	17-Mar
Metrics That Matter						Avg	Avg		
Opening Backlog			428	300	220	227	177	222	204
Backlog Over 30 days			108	100	96	95	75	64	68
Tickets Created			556	599	589	553	511	479	506
Tickets Completed			534	471	509	488	520	497	536
Added to Backlog			22	128	80	65	(9)	(18)	(30)
% of First Response Met			99%	97%	98%	98%	99%	99%	98%
Avg Elapsed Hours to Respond			1.0	1.3	0.9	1.0	1.0	1.1	1.0
% of Resolution Met			83%	80%	85%	85%	82%	76%	74%
Avg Elapsed Hours to Resolve			6	5	6	6	8	14.8	8.4
Avg Survey Score			4.6	4.7	4.5	4.6	4.5	4.5	4.6

Many of the values in the Ticket Analysis cells, including the values that appear in the Metrics that Matter display, pull their data from other "reference" cells in the worksheet. To edit the content of cells that contain a reference to another cell and maintain their ability to update when your data is refreshed, you must change the cell that is referenced. Do not edit the data itself.

To determine what cell is being referenced, put your cursor in a data field. This applies to label fields as well. For example, in the image below, the value for March 10 is driven by the formula in cell N92.

	Met Target	Week Trend	Current Week	Last Week	Prev Week	Last 4 Weeks	Prev 4 Weeks	10-Mar	17-Mar
11	Metrics That Matter								
12	Opening Balance								
13	Backlog Over 30 days								
14	Tickets Opened								
15	Tickets Completed								

To change a metric:

1. Locate the row that contains the metric that you want to display and check the row number.

For example, to replace Opening Backlog with Opening Backlog for Highest Priority Tickets, locate the heading for your highest Priority (Priorities are specific to your Autotask setup) in column F and check the row number. For example, in the image below, the highest priority is Critical and the row is #25. So the cell to reference is F25.

23	Opening Balances			
24	BY PRIORITY			
25	Critical		0	0
26	High		10	11



Your workbook row and column combinations may differ from the examples.

2. Scroll back up to the Metrics that Matter data.
3. Click the cell for Opening Backlog.
4. Replace the current reference value with = followed by the column letter and row number of the Critical Priority cell. In our example, it would look like this =F25.

As you change the cell references, you should see the update.

5. Update the other fields in that row to display values related to the new heading. You can copy the reference value, for example, =F25, and paste the value into all related cells on the row. The workbook will update the reference value to the correct column letter.

As the values change, you can see the trending sparkline update.

6. Save the changes.

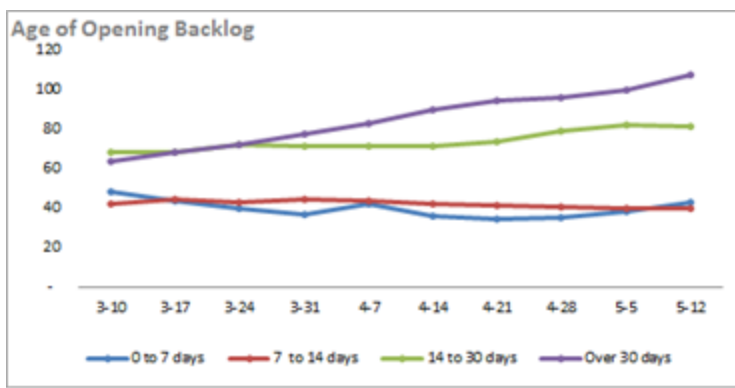
To add or change the Target value:

You can add a Target value or update the existing value.

1. Locate the Target Value column and click in the cell of the row that you updated. Enter the new Target Value.
2. Click in the Target Type cell (column AC) and select Over, Under, or None, that is, do you want your values to fall under the target value, over the target value, or meet the target value.
3. Save your changes.

Change the Ranges for Chart Data

Many of the charts in the Service Desk, Sales, and Financial workbooks present data segmented into defined ranges. For example, in the Age of Opening Backlog chart for the Service Desk 10 Week workbook, the default ranges are 0 to 14 days, 14 to 45 days, 45 to 120 days, and over 120 days.

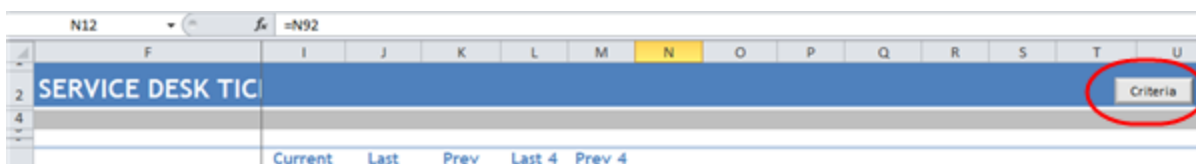


All chart ranges and data are specified on the Data Analysis tabs in each workbook: Service Desk, Ticket Analysis; Sales, CurrentFY and PreviousFY; and FinancialsCurrent and FinancialsPrevious.

The following steps and demonstration video are based on the Service Desk Ticket Analysis. These steps apply to the defined ranges for all workbooks.

View a video: [Performance Dashboards: Configure Your Trending Criteria](http://www.youtube.com/watch?v=5YiGatZ_jEM) http://www.youtube.com/watch?v=5YiGatZ_jEM

1. Select the **Ticket Analysis** tab.
2. Click the **Criteria** button on the far right of the heading row.



This exposes the criteria values that drive the calculations for each week (or day).

Service Desk Ticket										
Row Id	Criteria1	Criteria2	Criteria3	Category	CurrWeek	PrevWeek	Column	4Week	Prev4Week	Week
				Criteria Start Date -->	N/A	N/A		N/A	N/A	10-Mar 17
				Criteria End Date -->	N/A	N/A		N/A	N/A	16-Mar 23
					Current Week	Last Week	Prev Week	Last 4 Weeks	Prev 4 Weeks	10-Mar 17
				Opening Balances	Avg		Avg			
				BY PRIORITY						
26	PriorityA	Critical		Critical	2	2	2	2	3	3
27	Priority2	High		High	50	48	47	46	45	46
28	Priority3	Medium		Medium	153	147	140	139	126	121
29	Priority4	Low		Low	67	63	63	61	57	53

Rows 7 and 8 contain start and end dates that are set automatically when you refresh. Do not change these settings.

Columns C, D, and E contain criteria values that you can change to customize the workbook for your workflow.

Column C (Criteria 1) is the driver for most calculations. In the image above, Column C is set to specify which priorities to display. If you make changes to the criteria, for example, change their order, the Ticket Analysis data will update, along with any charts that display the criteria.

3. Scroll down to the first row that displays range data you want to update, for example, the Age of Backlog data on the Service Desk workbook Ticket Analysis tab. In the image below, that is row 81.



This example uses the Service workbook. The described procedures apply to all workbooks.

Service Desk Ticket										
Row Id	Criteria1	Criteria2	Criteria3	Category	CurrWeek	PrevWeek	Column	4Week	Prev4Week	Week
				Criteria Start Date -->	N/A	N/A		N/A	N/A	
				Criteria End Date -->	N/A	N/A		N/A	N/A	
					Current Week	Last Week	Prev Week			
80				BY AGE OF BACKLOG						
81	Age of Backlog	0	14	0 to 14 days	43	38	36			
82	Age of Backlog	14	45	14 to 45 days	40	40	41			
83	Age of Backlog	45	120	45 to 120 days	82	82	80			
84	Age of Backlog	120	999999	Over 120 days	108	100	96			
85				BY GROUP						
86	GroupA	Americas		Americas	182	173	166			
87	Group	EMEA		EMEA	66	64	63			
88	Group	Australia		Australia	23	22	22			
89	Group	AsiaPAC		AsiaPAC	2	1	2			

Locate the column that contains the range values. In the example, columns D and E contain the range values for the Age of Backlog chart.

4. Change the range values as needed and then update the labels in column F.



You must manually edit the labels in column F to match the new values.

The range values in the charts that use this metric will update automatically.

5. When you have finished, Save.

Use Criteria to Set Filters on Your Chart Data

The Service workbook charts are automatically populated with all the tickets from the top ten issue types and sub-issues (by ticket count), all queues, and all sources. When Criteria are exposed in the Analysis tabs, you can hide one or more rows to filter tickets by the criteria in that row. For example, if you hide the row that holds the data for a particular queue, tickets from that queue are excluded from the data.

1. If Criteria are not exposed, click the Criteria button.
2. Locate the Queue, Issue Type, or other ticket options you do not want to include in your ticket data.
3. Right-click the row and select Hide.

When the row is hidden the data does not display.

4. To return a hidden row, select the row above and below and then right-click and select Unhide.
5. Save changes.

Add or Update an Advanced Where Clause

The Advanced Where Clause is an SQL query option that allows you to filter out data that you don't want to include in the workbook analysis. For example:

- The **Service Desk** workbooks will download all the service ticket data for the last 10 weeks or 10 days by default. You may want to limit the download to certain queues, issue types, or other ticket criteria.
- The **Sales** workbook will download all closed opportunities for the current and previous year and all forecasted opportunities within a specified date range. You may want to limit the closed opportunities to specific sales teams or accounts, or change the date range for forecasted opportunities.
- The **Financial** workbook will download all revenue and costs for the current and previous year by default. You may want to restrict the download to certain contract types, contract categories, accounts, work types, etc. In addition, the Financial workbook will download all resource hours for the current and previous year by default. You may want to restrict the download to certain resources, work types, etc.
- The **Projects** workbook will download all Project and Task data for the last 10 weeks by default. You may want to limit the download, for example, to include only client projects or open tasks.

Creating a WHERE clause requires experience in forming SQL queries. If you have the resources to create or edit a WHERE clause, you can do that on the Config worksheet tab.

If you need assistance in creating the WHERE clause, contact Autotask Customer Support. Refer to "Contacting Customer Support" on page 47.



When contacting Customer Support, be sure to provide your Company name, email address, and a description of the types of tickets you want to exclude and include.

How to Edit or Add the Advanced Where Clause

1. Open your workbook and click the **Config** tab.
2. In the Configuration worksheet, scroll down to **Advanced Where Clause**.

If you already have one or more Where clauses in place, the **Advanced Where Clause** field displays the current clause. You can edit or replace the clause.

3. Click **Update Where Clause**.
4. If you want to edit the current clause, make changes as needed.
5. To add a clause, type the clause into the text box or copy and paste your prepared Where clause into the field.
6. Click **Update Where Clause**.

Sample Advanced Where Clauses for Service Desk



This information is specific to the **Service Desk** workbook. Do not use these samples in the Sales workbook.



The following sample clauses are taken from the video "[Performance Dashboards: How to exclude data from the service workbook](https://www.youtube.com/watch?v=FCUHehN50K8)". To watch the video, use the link above, or enter this URL in your browser: <http://www.youtube.com/watch?v=FCUHehN50K8>.

Since the intent is to exclude data from the workbook download, all sample clauses use the operator "not in". The item names in parentheses in the sample are taken from a sample workbook. You will need to find the correct names for items in your workbook. You can find that information on the Ticket Analysis tab.



Although you can use the "not in" operator in Where clauses for the Sales workbook, the other data shown in these examples is specific to the Service Desk workbook.

Filter by Queues

```
wh_queue.queue_name not in ('Recurring', 'Internal')
```

Filter by Issue Types

```
wh_issue_type.issue_type_name not in ('Sales', 'Admin')
```

Filter by Sub-issue Type

```
wh_subissue_type.subissue_type_name not in ('Rejected')
```

Filter by Status

```
wh_task_status.task_status_name not in ('On Hold')
```

Filter by Source

```
wh_ticket_source.ticket_source_name not in ('Sales Form')
```

Frequently Asked Questions - FAQs

1. Can I save my workbook password so I do not have to enter it every time I refresh my data?

Yes, you can save your password in Excel under Data > Connections. You must save the password for each workbook you use. For instructions on how to save your password, refer to "Save Your Password (Optional)" on page 6.

2. How do I password protect my workbooks at the Excel file level?

1. Open your workbook in Excel and click File.
2. Click the Protect Workbook icon to open the menu.
3. Select Encrypt with Password.
4. Follow the instructions to add a password for the file.
5. Save the workbook.

3. How do I filter my ticket data to exclude data I do not need, like sales queues or issue types that are not part of my customer related activity?

The service workbooks automatically download data for all of your tickets. If you don't want to include all tickets, you can filter the downloaded data using an Advanced Where clause. You can add the clause on the Config tab.

For details, watch this short video: [How to exclude data from the service workbook](http://www.youtube.com/watch?v=FCUHehN5oK8) <http://www.youtube.com/watch?v=FCUHehN5oK8>

Or refer to "Add or Update an Advanced Where Clause" on page 41.



Just a reminder: Always save a backup copy of your original workbook before you make changes.

4. Can I have different versions of the performance workbooks targeted for different teams?

Yes, you can save multiple versions of your workbook.

1. Filter the data as needed using the Advanced Where clause (see question 3) and make any additional changes you want to the workbook charts.
2. Save the workbook file under a different name.

You can save as many "custom" versions as you need.

5. How do I change the ranges in my charts (1-7 days, 8-14 days etc.) so I see what I need?

You can change the data ranges and many other parameters in your charts. You can also change the labels. You make these changes once in the Ticket Analysis tab and the changes then update in every page in the workbook (and in any linked charts in PowerPoint presentations).

- In the Ticket Analysis page, click the **Criteria** button on the top right to view customizable options.

For more information, view the following short video - [Performance Dashboards: Configure Your Trending Criteria](http://www.youtube.com/watch?v=5YiGatZ_jEM)
http://www.youtube.com/watch?v=5YiGatZ_jEM

Or refer to "Customizing Your Data Display" on page 34.

 Always make a backup of your workbook before you make changes.


6. Sometimes I see ### marks instead of numbers? Why does that happen and how can I correct it?

This is usually due to display/cell size issues; that is, the number is too large (too many characters) to fit in the cell at the given screen resolution. To correct this, select the content and reduce the font size so all the characters can fit.

7. How do I embed a linked chart from my workbook in my PowerPoint presentation?

It's easy to put a chart from workbook into a PowerPoint presentation. If you add the chart as a linked object, you can quickly update your presentation data directly from the workbook.

 The sample PowerPoint presentation, Executive_meeting.pptx, sent with your workbook files and credentials, already includes a number of charts from the Weekly Analysis Service workbook.

1. Select and copy a chart in your workbook (CTRL+C).
2. Click in the PowerPoint slide where you want the chart.
3. In the Home ribbon, click to open the Paste menu and select  (Keep Source Formatting and Link Object).

Refer to "Add Linked Charts to PowerPoint Presentations" on page 32.

8. How do I create static reports (PDFs) I can share with customers?

1. Select the view you would like to publish.
2. Under "Save As", select the format PDF.

9. How do I change chart types, colors and settings so I can make the charts look the way I want?

1. Save a backup copy of your workbook.
2. Right-click in the chart you wish to modify to display options menu.
3. Select Change Chart type and follow the steps to achieve the desired type and style.

For more details, refer to "Customizing Your Data Display" on page 34.

10. How often can I refresh my workbook?




The Workbook data cache is updated once every 24 hours. As such, you can update the workbook once daily and your analysis will be valid for that day. For more information, refer to "About the Workbooks Data Cache" on page 46.



About the Workbooks Data Cache

When you configure an Autotask workbook, and every time you refresh your data, you access the Dashboard Data Cache. The Data Cache includes a select group of data views that map to one or more tables in your Autotask database.

The views contain only the data used to populate the Performance Dashboard workbooks. Because the workbooks access only a small segment of your database, you can quickly download data to your computer and work locally.

 The Dashboard Data Cache is a unique set of data views. It is not related to the Autotask Report Data Warehouse. Autotask does not support any use of the Dashboard Data Cache in a SQL reporting environment. If you require full access to a SQL based environment, please contact your Account Manager for information on acquiring access to the Autotask Report Data Warehouse.


The Dashboard Data Cache is a contract based service. Your Data Cache login credentials allow access to only your company's Autotask data. You cannot share your workbook with other Autotask users.

Data Refresh Times

You refresh your workbook data directly from the Dashboard Data Cache. Currently, the Data Cache is automatically refreshed daily from a backup of your production database. Refresh time occurs as follows:

- Between 1 AM and 5 AM EDT
- Between 1 AM and 5 AM GMT for customers hosted through our LON Data Center.

To be sure you get the most current data when you refresh, and to avoid potential disruption of your workbook refresh process, do not attempt to refresh during this time.


 If you must refresh regularly during this time period, please contact your Autotask Account Manager to arrange for a specific Dashboard Data Cache refresh time.

Contacting Customer Support

Autotask does not provide individual training or customization for Performance Analytics Workbooks.

Before contacting support, please review the information in this PDF document, especially "Get Started with Performance Analytics" on page 3, "Frequently Asked Questions - FAQs" on page 43, and "About the Workbooks Data Cache" on page 46.

If you have difficulty accessing the Workbooks Data cache, or to report a technical problem with your Workbook, please contact [Datto Customer Support](#).

 When we create a ticket, it will consume one of your annual support incidents. If you do not know the details of your company's Support Package, please contact your Account Manager.

Using the Client Portal

Access the [Client Portal](#).

All Autotask customers have access to the Client Portal, where you can create a support ticket. It is also the most effective and convenient way for you to receive updates on the progress of your Support requests.


Requests submitted electronically are queued and handled in the order they are received. Our Support team will provide its initial correspondence on the ticket and via email to the customer contact. We will use this first contact to provide a resolution or to request more details. If additional research is required, your ticket will be annotated, prioritized and routed to our team.

Account Champions are provided with the required Client Portal credentials upon completion of their Implementation. Non-champions can gain access to the portal through their Account Champion. If you are the Account Champion and do not yet have access to the portal, please reach out to our Support team for assistance.

How many support incidents are you entitled to per year?

The annual number of support incidents Autotask will handle free of charge is spelled out in your Autotask contract. The number of incidents is decremented as you utilize our support services. If we determine that your support incident is related to a bug in the software, your allotment of incidents will not be decremented. Autotask Client Services has the sole discretion of what constitutes a support incident within the scope of Support.

If you have any questions regarding your company's Support Package, service levels, specific training options, or any other service or support needs, please contact your Account Manager.

 To maximize your support incidents, Autotask recommends that you select a Champion who becomes your internal focus point for use of Autotask products, and can assist in developing proper workflows, your own internal standard operating procedures, and reviewing and raising issues as needed to Autotask Product Support. Typically Autotask will direct our communications regarding updates, release schedules, new education offerings, etc., to Champions as a primary point of contact at your company. Access to the PSA Client Portal is controlled by each customer's Autotask Champion.

What are your (the customer's or partner's) responsibilities?

Autotask's obligation to provide Support is contingent upon the customer:



- Using the Autotask resources; Community, Training, and Online Help to research topics and potential resolutions prior to submitting an incident
- Making reasonable efforts to resolve any Incident after obtaining a proposed resolution from Autotask
- Using best efforts to provide Autotask, at the reasonable request of Autotask, with data, information, assistance, and/or materials as necessary
- Eliminating the potential conflict on non-Autotask products interfering with Autotask product operation
- Ensuring that the local operating environment is working correctly and any issue that may be experienced is not caused by a network or facilities failure