



Autotask Professional
Services Automation

Performance Analytics: Service Workbooks

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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 62

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.



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.

- 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 56.
- 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.
- 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 62.

- 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 56.

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" on page 9, Using Client Workbooks, 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 61.

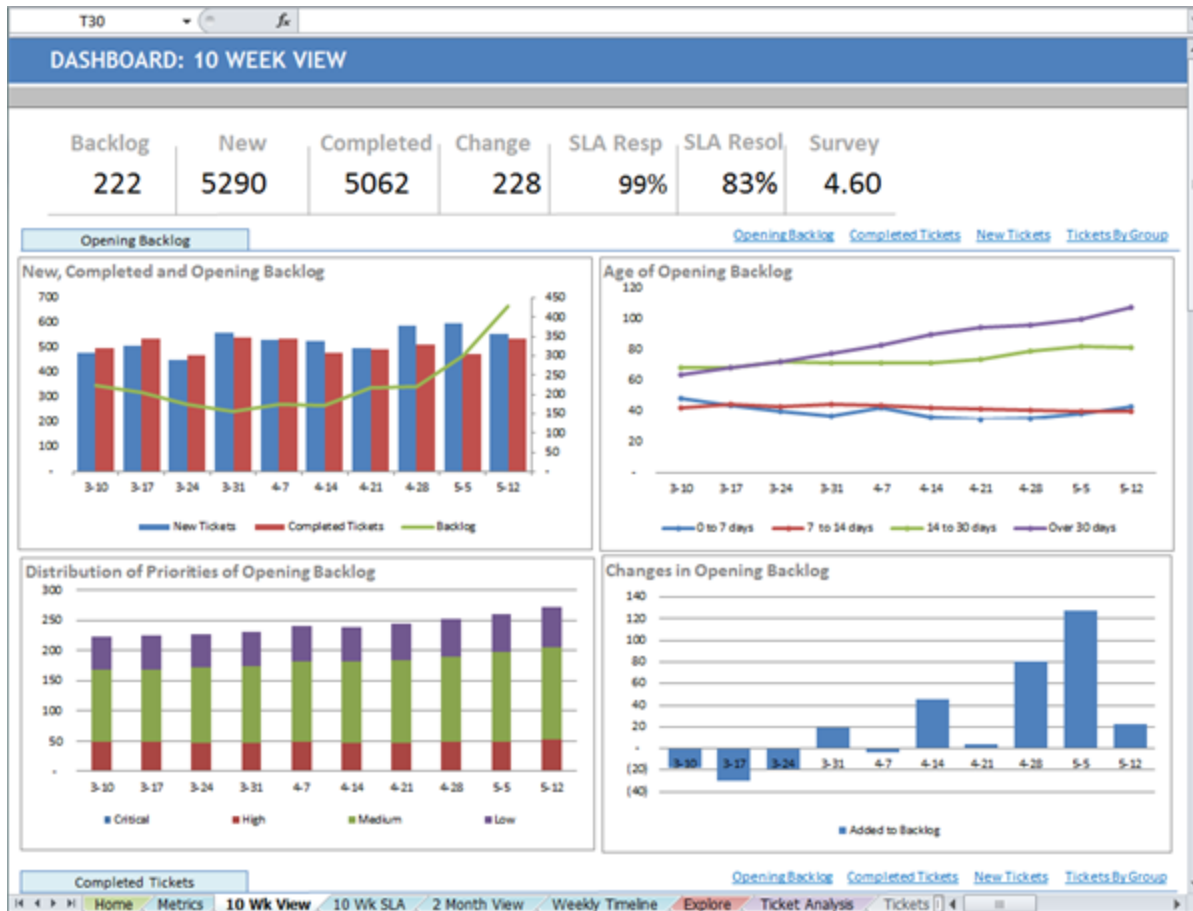
There's More!

To learn about more options to customize your workbook , refer to "Take Your Workbook to the Next Level" on page 46.

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 62.

Using the Service Desk Workbooks



There are two Service Desk Workbooks to help you analyze the trends in the Service workflow of your business. Each presents key data about your tickets from start to finish so you can determine what is working and where there are potential problems.

Weekly Analysis provides a long term view of your workflow. If you're responsible for overall management of the business, you can look at trends over time. Is your backlog growing or shrinking? Are there certain days or times that you're not meeting your SLA first response? What are your customers saying about your service (Survey responses)? If you can answer these types of questions, you can adjust resource management, billing rates, and procedures to optimize your process.

Daily Analysis presents your day to day workflow. If you manage the daily operations of your company's service business, you can get the information you need to manage the workload proactively. What issues need your immediate attention and where do you need the most resources? Are there any unexpected increases in new tickets, high priority tickets, or ticket backlog and what is the cause? This information can help you spot and manage potential problems before they develop.

Both workbooks include basic Metrics, Dashboard, and Timeline views that present the same data, but the timeframe for that data is by week or by the day, depending on the workbook. Each workbook also includes several worksheets that focus on short term data or long term trends.

Metrics that Matter

The Metrics worksheet tab includes 10 key metrics that were selected to provide an overview of how your Service workflow is performing.

	This Week	Last Week	2 Wks Ago	10 Week	10 Week	Target
	5/12/2013	5/5/2013	4/28/2013	Trend	Met Plan	
Opening Backlog	428	300	220			< 220
Backlog Over 30 days	108	100	96			< 110
Tickets Created	556	599	589			< 600
Tickets Completed	534	471	509			> 400
Added to Backlog	22	128	80			< 100
% of First Response Met	99%	97%	98%			> 0.9
Avg Elapsed Hours to Respond	1.0	1.3	0.9			< 1.5
% of Resolution Met	83%	80%	85%			> 0.8
Avg Elapsed Hours to Resolve	5.7	5.2	6.1			< 6
Avg Survey Score	4.6	4.7	4.5			> 4.5

You can set a target for each metric for the designated time frame. Sparkline graphs and charts provide a quick assessment of the overall trend for each metric, and when it is meeting its target.

Refer to "Viewing Key Service Metrics" on page 13.

Dashboard and Timeline Views

These worksheets present data for all tickets in the specified time period.

On each analytics worksheet, you can scan critical high level data at the top of the page. Weekly workbooks display data for the previous 10 weeks. Daily workbooks display data for the previous 10 days.

Both workbooks display the following data:

Backlog	New	Completed	Change	SLA Resp	SLA Resol	Survey
222	5290	5062	228	99%	83%	4.60

- The overall count of Backlogged, New, and Closed tickets
- The total difference between New and Completed tickets (Change)
- The percent of tickets that met their SLA first response and resolution targets
- Your overall customer survey rating

Below these metrics on the analytics worksheet, related data is presented in a collection of easy to follow charts.

Dashboard: 10 Week or 10 Day View

This dashboard presentation looks at multiple views of the following data: Opening Backlog, Completed Tickets, New Tickets, and Tickets by Group.

For details, refer to "Dashboard: 10 Week or 10 Day View" on page 14.

Dashboard: 10 Week or 10 Day SLA

This dashboard presentation looks at multiple views of Service Level Agreement (SLA) or Survey data.

For details, refer to "Dashboard: 10 Week or 10 Day View" on page 14.

Dashboard: 2 Month View (Weekly Analysis only)

This dashboard presentation compares the most recent four week activity to the previous four weeks, for six key indicators: Backlog, New Tickets by Priority, New Tickets by day of week, Hours Worked on completed tickets, Service Level Agreements first response met, and Service Level Agreements resolution met.

For details, refer to "Dashboard: Rolling Four Week Comparison" on page 35.

Dashboard: Backlog (Daily Analysis only)

This dashboard presentation provides an immediate assessment of current ticket backlog. Four charts present backlog data by age and activity. Nine additional charts break down backlog by specific characteristics including priority, issue type, sub-issue type, queues, top 5 clients, top 5 resources, group and first response met.

For details, refer to "Ticket Backlog Dashboard" on page 37.

Weekly or Daily Timeline

This interactive dashboard presentation lets you view trends at weekly intervals over a 10 week (Weekly Analysis) period or over a 10 day period (Daily Analysis). Slide the Ticket Balance scroll bar to view multiple data comparisons in these areas: Opening Backlog, New Tickets, Completed Tickets, Service Level Agreements (SLA) and Survey Results.

For details, refer to "Service Desk Timeline View" on page 28.

Explore

This powerful and flexible interactive dashboard lets you filter all data on the worksheet by multiple criteria, for example, by ticket Status, and/or Priority. Learn details like which issue types generate the most critical tickets or which resources are assigned to the most tickets in your backlog. The Ticket Count in the header reflects how many tickets meet the selected criteria.

The individual charts on this page fall into three groups: Trending and Activity, Top 5 Lists, and Service Level Agreement and Survey. Below the charts, you can view a list of all the tickets that fall under the selected criteria.

For details, refer to "Explore Your Data" on page 31.

Data Analysis Tabs

These worksheets allow you to view, compare, and quickly access the data visually represented in the Dashboards and Timeline Views. Data is grouped and sorted to correspond to the visual presentations. You can also view a list of all tickets included in the data analyzed for this workbook.

Ticket Analysis

This tab contains, in table format, all the ticket data that drives the service desk charts. Data is grouped by Opening Balances, Tickets Opened, Tickets Closed, and Service Level performance. It is then sorted within groups by the criteria presented in the graphs and charts, for example, By Priority or By Hours Worked. Each group is sub-totaled. Refer to "Data Analysis and Tickets Detail Tabs" on page 44.

Backlog Analysis (Daily Analysis only)

This tab contains backlog data **by resource**, in table format and grouped by Opening Balances, Tickets Opened, Tickets Closed, and Service Level performance. Data is sorted within groups by the ticket characteristics and other attributes that appear in the charts on the Backlog tab, for example, Priority or Hours Worked. Each group is sub-totaled. Refer to "Ticket Backlog Dashboard" on page 37.

Ticket Detail

The ticket detail lists all tickets included in the data analyzed for this workbook, that is tickets created during the specified time period, closed during the specified time periods, and all backlogged tickets. Refer to "Data Analysis and Tickets Detail Tabs" on page 44.

Viewing Key Service Metrics

The Metrics worksheet tab includes 10 key metrics that were selected to provide an overview of how your Service workflow is performing.

	This Week	Last Week	2 Wks Ago	10 Week	10 Week	Target
	5/12/2013	5/5/2013	4/28/2013	Trend	Met Plan	
Opening Backlog	428	300	220			< 220
Backlog Over 30 days	108	100	96			< 110
Tickets Created	556	599	589			< 600
Tickets Completed	534	471	509			> 400
Added to Backlog	22	128	80			< 100
% of First Response Met	99%	97%	98%			> 0.9
Avg Elapsed Hours to Respond	1.0	1.3	0.9			< 1.5
% of Resolution Met	83%	80%	85%			> 0.8
Avg Elapsed Hours to Resolve	5.7	5.2	6.1			< 6
Avg Survey Score	4.6	4.7	4.5			> 4.5

You can set a target for each metric for the designated time frame.

You can instantly see the following:


- Values for the selected metrics for the previous three weeks (Weekly Analysis) or the previous three days (Daily Analysis).
- Whether or not a metric has met its target for each time frame. A red icon indicates a missed target.
- A sparkline graph that shows the overall trend for the previous 10 weeks or 10 days.
- A sparkline bar chart that shows where the target was met or missed for the previous 10 weeks or 10 days. Green indicates the target was met, red indicates a missed target.
- The target specified for each metric.

 The total ticket count for 7 of these metrics appears at the top of each dashboard and the timeline views.

For information on setting targets, changing labels, and changing which data displays, refer to "Customizing Your Data Display" on page 49.

Dashboard: 10 Week or 10 Day View

In each workbook, 10 Day or 10 Week, this worksheet displays up to 10 charts grouped into four types of ticket related data. Above each group you can click a hyperlink to quickly jump to another group.

 In your workbook, hover over any point in a chart to see details for that point.

About the Graphs in this Topic

The graphs included in this topic were taken from the 10 Week workbook, with the exception of the New Tickets per Hour chart. The 10 Day workbook includes most of the same charts except instead of showing data by week, the data is presented by day. The charts display and compare the same type of data in a different time frame.

In the examples below, when the table description indicates that the x or y axis = weeks, for the Daily Workbook the x or y axis = days.

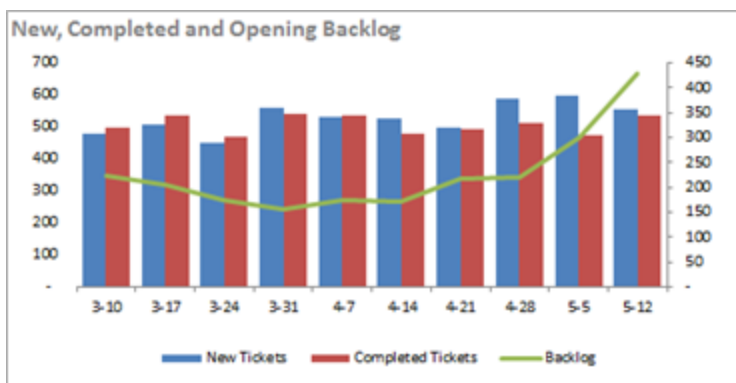
Opening Backlog

It's important to monitor trends in your ticket backlog, both on a day to day and long term basis. Is it moving up, down, or staying steady over time?

When you look at the Daily analysis, you can spot a trend as it starts to build, or see a spike over a short time. You can drill down to determine if it's just a chance occurrence or if you need to make some changes.

When you look at the weekly analysis, you can see trends over an extended time. Improvements can validate what you have been doing, and poor results can point out problems that were not spotted or addressed on the daily level.

New, Completed, and Opening Backlog



Y Axis = Number of tickets

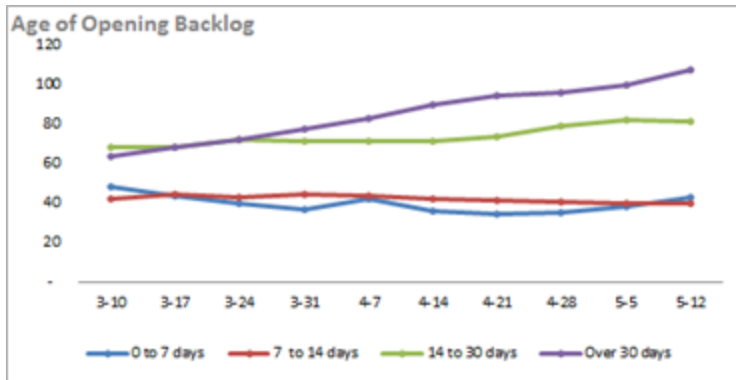
X Axis = Weeks

Secondary value axis = Number in Backlog

Blue = New Tickets, Red = Completed Tickets, Green = Backlog
 Compare the number of new tickets (blue, left column) to the number of completed tickets (red, right column).
 The green line follows the opening backlog count for tickets by week during the same time period.

Insight: How are your backlog of new and completed tickets trending? The opening backlog is an indication of your team's ability to keep up with new tickets. When the backlog is accelerating, you might want to see if it's due to more new tickets or decreased ticket completion.

Age of Opening Backlog



Y Axis = Number of tickets

X Axis = Weeks

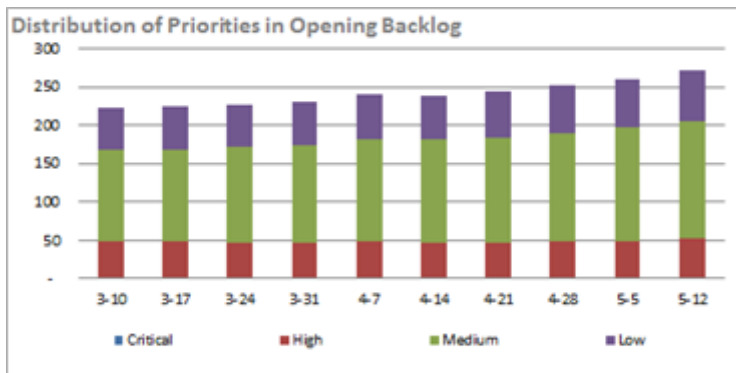
Blue = 0 - 14 Days, Red = 7 - 14 Days, Green = 14 - 30 Days, Purple = Over 30 Days

View the number of tickets in backlog (y axis) by week (x axis) and by how long they have been open. Each colored line represents a number range for days that tickets have been open.

Insight: How is your backlog aging? This chart shows the backlog over 30 days has grown from 65 tickets to over 100. This aging of backlog is a predictor of future SLA resolution and survey issues. The upward trend in tickets over 30 days would be apparent even at the Daily level.

Distribution of Priorities in Opening Backlog

Insight: Are you addressing the highest priority concerns of your clients? This chart indicates how the distribution of your opening backlog by priority is trending. You can see here that the number of medium priority tickets is growing but the number of high priority tickets has remained constant.



Y Axis = Number of tickets

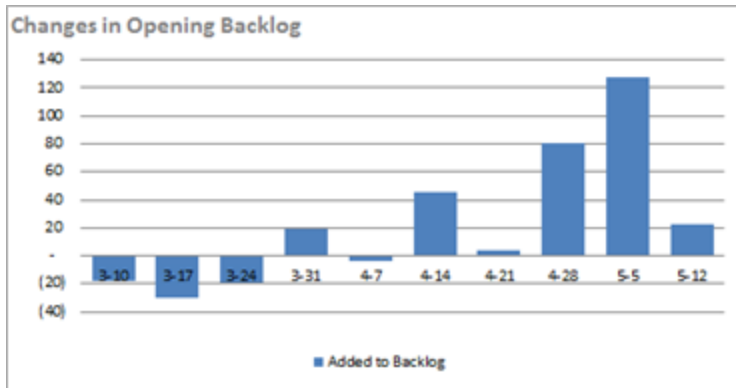
X Axis = Weeks

Blue = Critical, Red = High, Green = Medium, Purple = Low

View the number of tickets (y axis) in backlog by week (x axis) and priority.

Each column is divided by color; each color represents a ticket Priority. The order of priority from the x axis is from highest to lowest. In this chart, High (red) appears at the bottom because there are no Critical (blue) tickets.

Changes in Opening Backlog

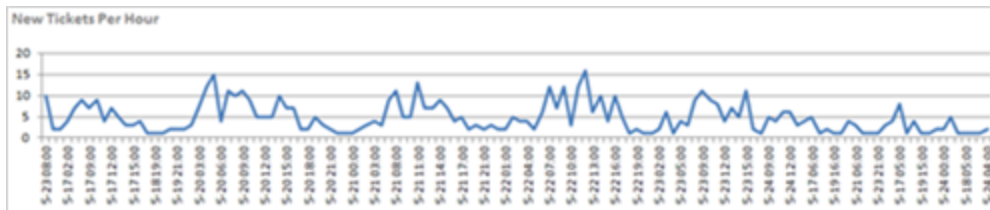


Y Axis = Number of tickets
X Axis = Weeks
Blue = Total tickets

View the number of tickets added or removed from the backlog by week. The x axis displays weeks. The y axis displays the number of tickets added to backlog (more tickets completed than added) above the y axis, and the decrease in number of tickets in backlog (more tickets completed than added) below the y axis.

Insight: How has the backlog changed from week to week? This chart provides an easy to view indication of the weeks when the team completed more tickets than they created. In this chart, we started out strong but in the recent weeks have not been able to keep up.

New Tickets per Hour (Daily Analysis Only)



Y Axis = Number of tickets
X Axis = Date/Time
Blue = Number of New Tickets

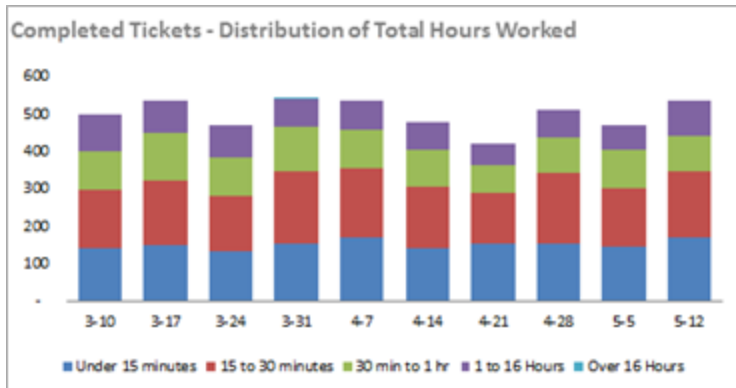
View the number of tickets created (y axis) by date and time (x axis).

Insight: This chart is targeted to day to day service management. At what time of day do you experience the highest volume for ticket creation? Does it vary by day? Is there a pattern that you can follow so you can assign your resources accordingly?

Completed Tickets

Compare week by week or day by day how many tickets were completed over the last 10 weeks or 10 days. You can also compare the time it took to complete them.

Completed Tickets - Distribution of Total Hours Worked



Y Axis = Number of tickets

X Axis = Weeks

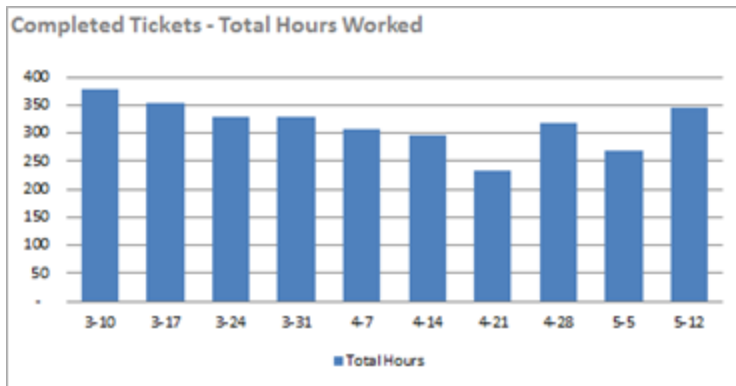
Blue = Under 15 minutes, Red = 15 - 30 minutes, Green = 30 minutes - 1 hour,

Purple = 1 to 16 hours, Turquoise = Over 16 hours.

View the number of tickets (y axis) completed by week (x axis) for the previous 10 weeks. Each column displays, by color, the range required to complete the tickets. Time increases from the x axis, with blue (under 15 minutes), at the bottom of the column. This chart does not include any light blue (over 16 hours).

Insight: How many tickets are closed at each time category? This chart shows the total number of closed tickets grouped by the amount of time it took to close them. A spike in the number of hours it takes to complete tickets over a couple of days might mean fewer available resources or a cluster of difficult tickets. But a spike over a longer period may also be an indication of a larger problem to address, or that you won't be able to keep up with ticket volumes.

Completed Tickets - Total Hours Worked



Y Axis = Number of tickets

X Axis = Weeks

Blue = Total hours

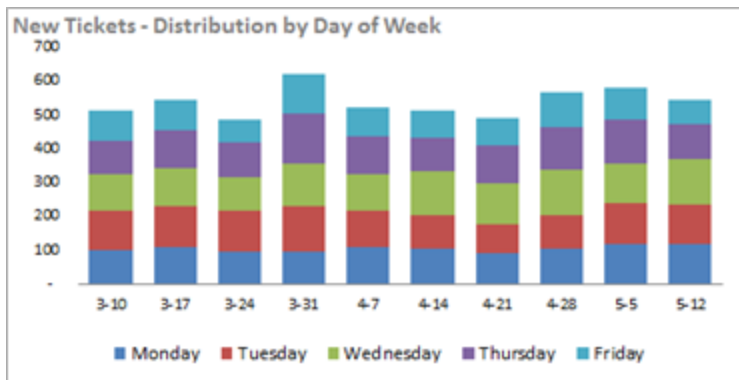
View how many total hours your team logged on tickets that were completed during a given week.

Insight: How many hours were logged on this week's completed tickets? This chart shows the total hours spent on tickets to close them, including time spent in previous weeks (or days). A drop in the total hours for a week is an indicator of either less work being done or if the volume of tickets is the same and issue types are the same, it means increased productivity from the team that can accommodate higher volume of tickets.

New Tickets

See how many new tickets are added each week and on which days. Compare new tickets by priority.

New Tickets - Distribution by Day of Week (Weekly only)



Y Axis = Number of tickets

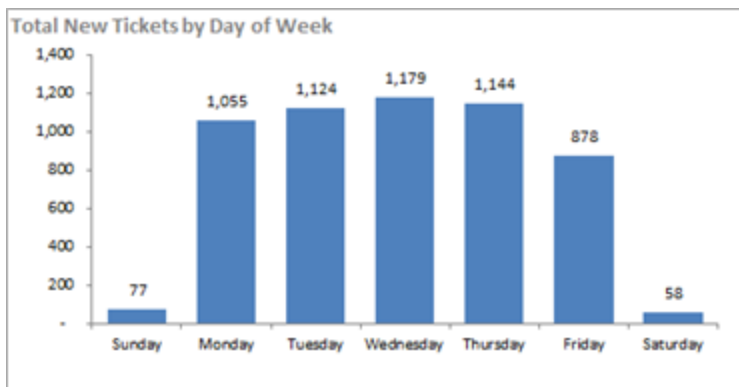
X Axis = Weeks

Blue = Monday, Red = Tuesday, Green = Wednesday, Purple = Thursday, Turquoise = Friday

View how many tickets (y axis) were created by week (x axis) and then by day in that week. Columns display days of the week by color with Monday (blue) at the bottom followed by Tuesday, Wednesday, Thursday, and Friday.

Insight: Do you consistently get the same number of tickets per day? This chart shows you the number of tickets coming in for each day. Based on the distributions in the chart, you can plan to have the staffing necessary.

Total New Tickets by Day of Week (Weekly only)



Y Axis = Number of tickets

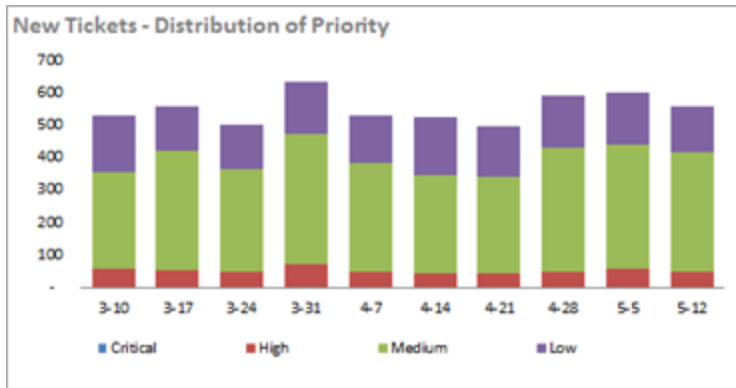
X Axis = Days of the week

Blue = Total hours

View how many tickets were added for each day of the week over the previous 10 weeks.

Insight: What's been the busiest weekday for new ticket volume of the past 10 weeks? In this chart, you can see Friday's ticket volume is lowest so it's the best time for your weekly staff meeting or for staff vacation.

New Tickets - Distribution by Priority

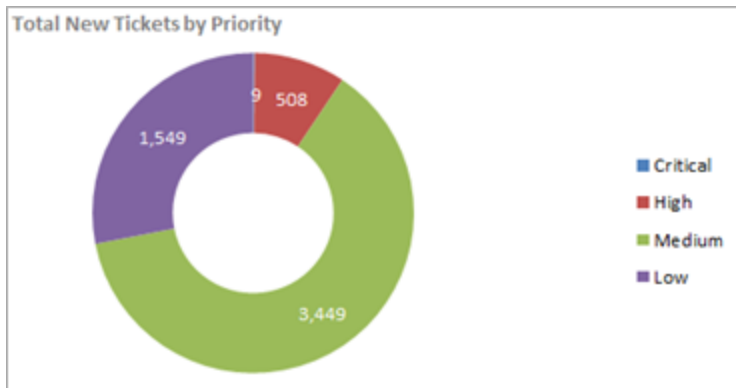


Y Axis = Number of tickets
 X Axis = Weeks
 Blue = Critical, Red = High, Green = Medium, Purple = Low

View how many tickets were created (y axis) by week (x axis) and then by priority during that week. The order of priority from the x axis for each column is Critical (blue), High (red), Medium (green), Low (purple). Note that in this time period there were not enough critical tickets (blue) to display on the chart.

Insight: Are you getting more high priority tickets coming in? This 10 week chart shows that although there was a small spike during the week of 3-31, the high priority tickets have trended steady for the most part. You would have seen a more detailed trend with the 10 Day Workbook for that date range. Maybe there was a problem, a new customer onboarding, or a new software roll-out that caused the spike but was addressed later.

Total New Tickets by Priority



Each sector represents a ticket priority.
 The number in the sector = the number of new tickets assigned that Priority.
 Blue = Critical, Red = High, Green = Medium, Purple = Low

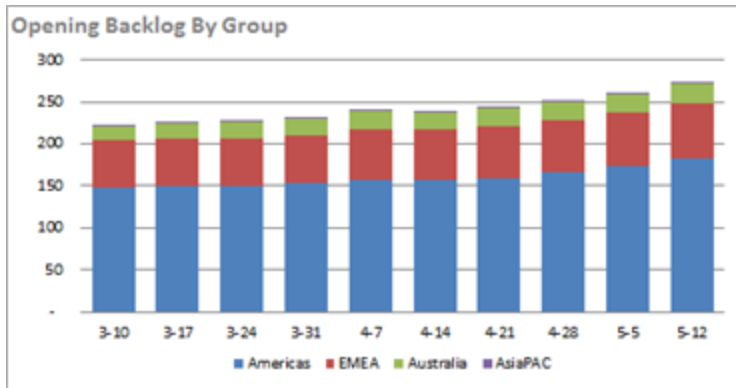
View how any new tickets were created for each priority during the previous 10 weeks. When all tickets for the total time period are viewed together, the 9 Critical tickets (blue) that were spread out over the 10 weeks are now visible.

Insight: What has been the priority distribution of new tickets over the past 10 weeks? In this weekly chart, we see that over time the majority have been low and medium tickets. For the 10 Day view, you'll be able to assess whether there is a sudden increase in higher priority tickets.

Tickets by Group

How do you group your customers? By geographic area, type of business, or maybe size? The following charts let you see how your ticket workflow is distributed by group.

Opening Backlog by Group



Y Axis = Number of tickets in backlog

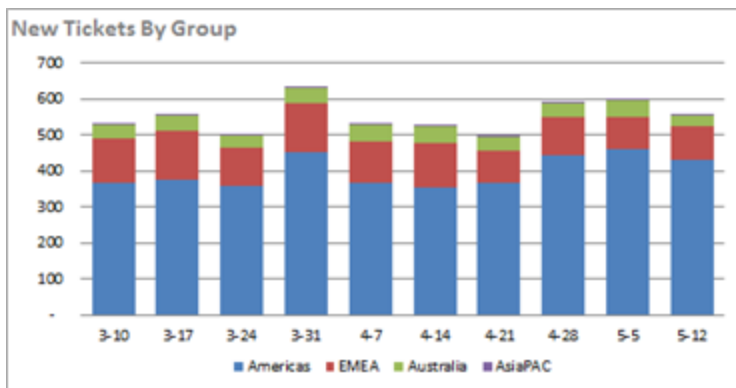
X Axis = Weeks

Blue = Americas, Red = EMEA, Green = Australia, Purple = AsiaPAC

View the distribution of ticket backlog by customer group for the previous 10 weeks. The y axis displays the backlog count and the x axis displays weeks. Each column displays customer groups by color in order from the x axis: Americas (blue), EMEA (red), Australia (green) and AsiaPAC (purple).

Insight: How is the opening backlog trending for your ticket groups? This chart shows that the Americas group is growing but EMEA and Australia have been pretty flat.

New Tickets by Group



Y Axis = Number of new tickets

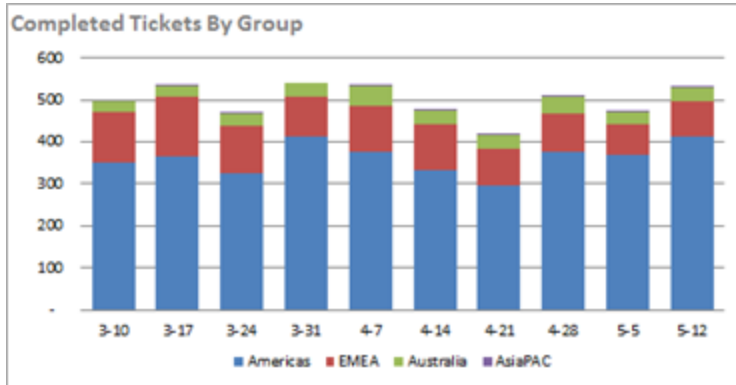
X Axis = Weeks

Blue = Americas, Red = EMEA, Green = Australia, Purple = AsiaPAC

This chart shows how new tickets for the previous 10 weeks were distributed by customer group. The y axis displays the ticket count and the x axis displays weeks. In each column customer groups are color coded in order from the x axis: Americas (blue), EMEA (red), Australia (green) and AsiaPAC (purple).

Insight: Which groups are getting the most new tickets and how are they trending? In this chart, the Americas group gets the majority of new tickets and the portion is growing. There may be more fluctuation in the 10 day chart - but an unusual spike or dip would be worth checking into.

Completed Tickets by Group



Y Axis = Number of completed tickets

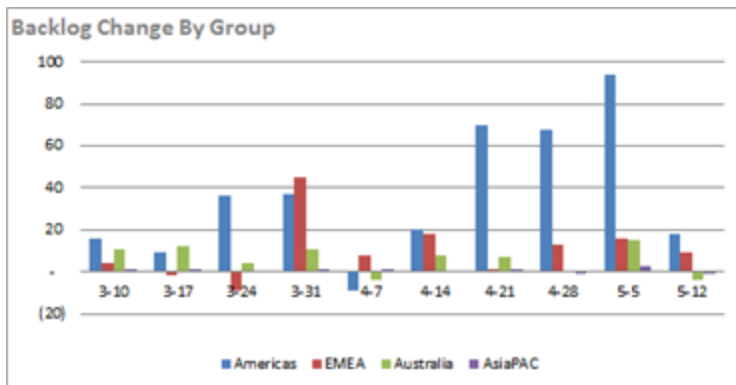
X Axis = Weeks

Blue = Americas, Red = EMEA, Green = Australia, Purple = AsiaPAC

View how completed tickets for the previous 10 weeks were distributed by customer group. The y axis displays the ticket count and the x axis displays weeks. In each column customer groups are color coded in order from the x axis: Americas (blue), EMEA (red), Australia (green) and AsiaPAC (purple).

Insight: Which groups are completing the most new tickets and what is the trend? The Americas group had a dip during 4-21 but it has been closing tickets reliably for the last three weeks.

Backlog Change by Group



Y Axis = Number of tickets

X Axis = Weeks

Blue = Americas, Red = EMEA, Green = Australia, Purple = AsiaPAC

View how the backlog for different customer groups has changed over the previous 10 weeks. The y axis displays increase in backlog (above the x axis) compared to the decrease in backlog (below the x axis). Columns are color coded by customer group: Americas (blue), EMEA (red), Australia (green) and AsiaPAC (purple).

Insight: What is the level of backlog change in your groups? In this chart, it appears that all groups are failing to keep pace during the last month but especially the Americas.


Dashboard: 10 Week or 10 Day View (SLA and Survey)

This worksheet displays up to 11 charts grouped into SLA and Survey related data for the either the previous 10 weeks (Weekly workbook) or previous 10 days (Daily Workbook). Above each group you can click a hyperlink to quickly jump to another group.

About the Graphs in this Topic

The graphs included in this topic were taken from the 10 Week workbook. The 10 Day workbook includes most of the same charts with a 10 day time frame. The charts display and compare the same type of data over in a different time frame.

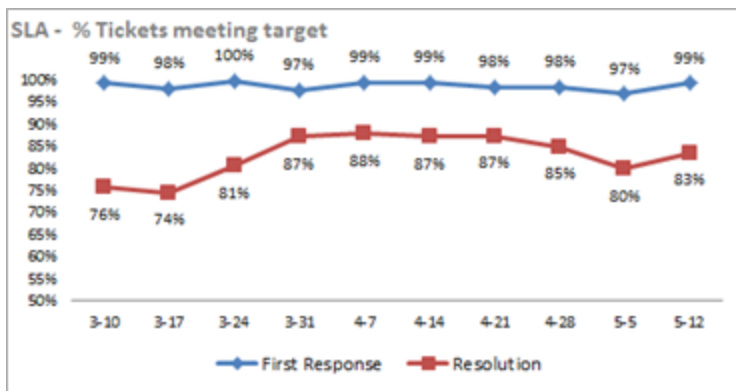
In the examples below, when the table description indicates that the x or y axis = weeks, for the Daily Workbook the x or y axis = days.

 In your workbook, hover over any point in a chart to see details for that point.

Service Levels

Are you tracking SLAs on your tickets? How many of your service level agreement targets are you meeting, and how many hours is it taking? This information is critical to your business for both day to day service desk management and long term planning and growth.

SLA - % of Tickets Meeting Targets

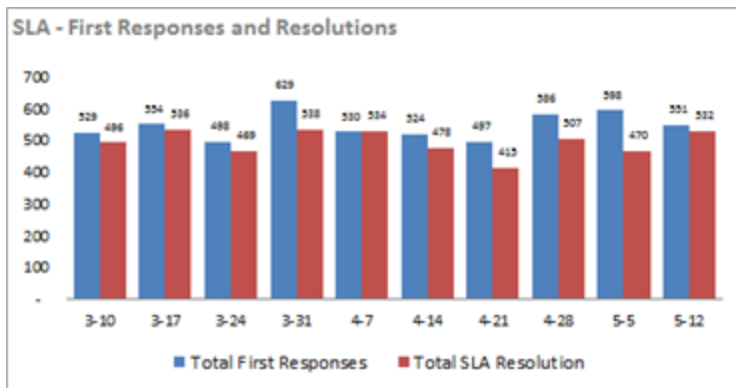


Y Axis = Percent
X Axis = Weeks
Blue = First response, Red = Resolution

View the percentage of ticket first responses (blue line) and resolutions (red line) that met their SLA targets in the previous 10 weeks.

Insight: Are you getting back to clients and resolving issues quickly enough? This chart shows the percentage of SLAs that met the first response and resolution targets. You can see in this chart that there was a slight dip during the week of 5-5.

SLA First Responses and Resolutions



Y Axis = Number of tickets

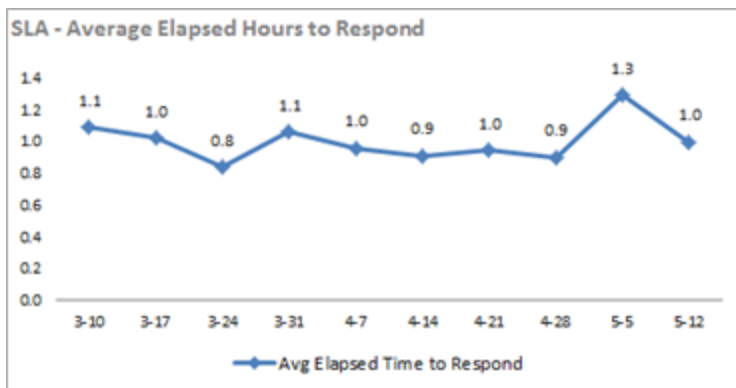
X Axis = Weeks

Blue = Total first responses, Red = Total SLA Resolution

View the number of tickets for which first response target was met (blue, left column) and for which resolution was met (red, right column) for the 10 week period.

Insight: This chart shows the trend of first responses and resolutions. It's important to look at the total ticket counts when reviewing the statistics on met targets. A drop in total tickets can make your percentages fluctuate. This is apparent when looking at this chart in the 10 Day workbook. You will likely see a dip in both first responses and resolutions on weekends and holidays when the total ticket count is usually lower.

SLA Average Elapsed Hours to Respond



Y Axis = Time in 0.2 hour intervals

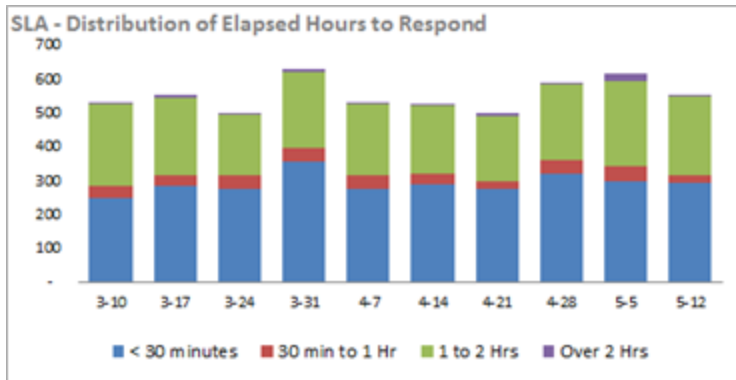
X Axis = Weeks

Blue = Average elapsed time to respond

View the average first response time for tickets by week for the previous 10 weeks.

Insight: How long on average does it take to acknowledge a new ticket? This chart indicates a consistent response rate except for the spike during the week of 5-5. The overall response can remain consistently good over time, even when the 10 Day chart shows a wide day to day fluctuation. But the day to day fluctuation could indicate staffing or workload inconsistencies that might lead to resource management issues in the future.

SLA Distribution of Elapsed Hours to Respond



Y Axis = Number of tickets

X Axis = Weeks

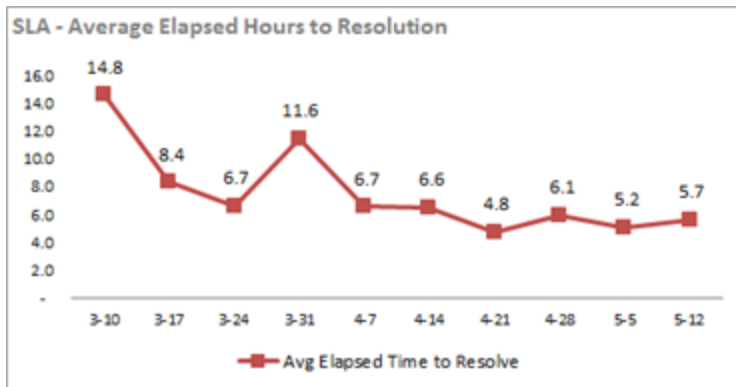
Blue = < 30 minutes, Red = 30 minutes to 1 hour, Green = 1 to 2 hours

Purple = Over 2 hours

View the number of tickets, (y axis) for which a response was made, by week (y axis) and the average response time. Each column is divided by color; each color represents the average time elapsed before response. The order of priority from the x axis is from the shortest time (blue, < 30 minutes) to longest time.

Insight: Are there any trends for the first response ranges? In this chart, you can see that there were a group of tickets that took over 2 hours to respond during the week of 5-5. If your service manager was monitoring the SLA workflow through the 10 Day workbook, the issues during the week of 5-5 were probably apparent at that time. It may have been just an unusual chain of events, but if the change was coming from a problem with the daily workflow, the service manager may have made some corrections at that time.

SLA Average Elapsed Hours to Resolution



Y Axis = Time in 2 hour intervals

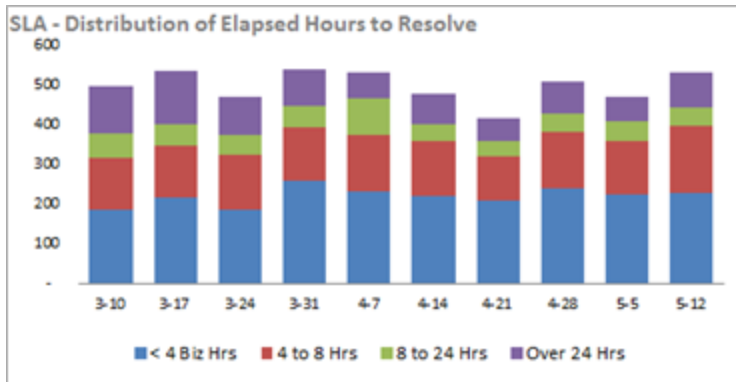
X Axis = Weeks

Red = Averaged elapsed time to resolve

View the average time taken to reach a resolution for tickets resolved during the previous 10 weeks.

Insight: For the tickets that were resolved, how long in elapsed business hours does it take to resolve a ticket? This chart indicates a steady decrease in the elapsed time. But we know that the aged backlog might indicate this will increase in the near future.

SLA Distribution of Elapsed Hours to Resolve



Y Axis = Number of tickets resolved

X Axis = Weeks

Blue = < 4 business hours, Red = 4 to 8 hours, Green = 8 to 24 hours

Purple = Over 24 hours

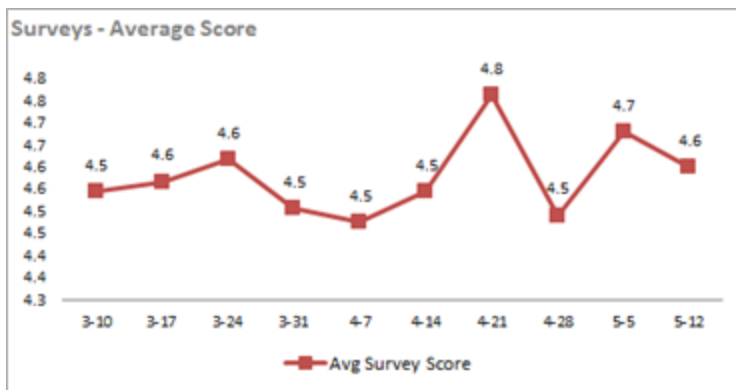
View the number of tickets (y axis) resolved by week (x axis). Each weekly column is divided by color, with each color representing a time range. The order of elapsed time from the x axis is from shortest time (Blue, < 4 business hours) to longest time.

Insight: What is the trending of response ranges? In this chart, you can see there are more tickets being handled in the < 4 hour and 4 to 8 hour ranges.

Surveys

Are you using Autotask surveys? The survey feature allows you to provide your customers a mechanism to let you know how well you did meeting their needs. With the charts in this group you can review key information about your customer survey results at a glance. You don't need to run separate reports.

Surveys - Average Score



Y Axis = Average survey score

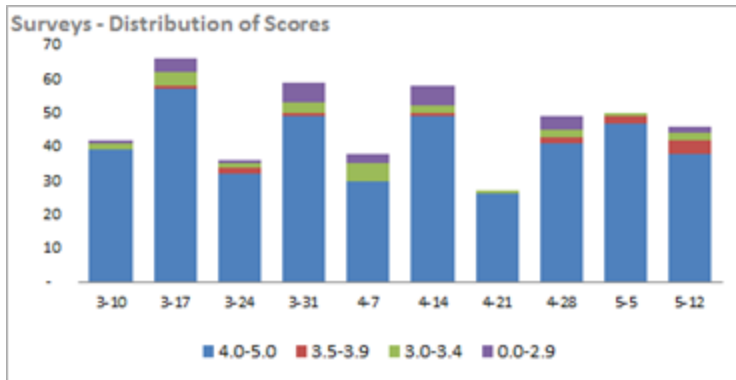
X Axis = Weeks

Red = Average survey scores over previous 10 weeks

View the average score received on customer surveys (y axis) by week (x axis).

Insight: Of the customers that completed the survey, how satisfied are they from the support they received? This chart shows the average survey score over the past 10 weeks. The 10 Day average survey score is more likely to show a lot of variation. One unhappy customer can sink the average on a given day.

Surveys - Distribution of Scores



Y Axis = Number of surveys

X Axis = Weeks

Scores: Blue = 4.0 - 5.0, Red = 3.5 - 3.9, Green = 3.0 - 3.4, Purple = 0.0 - 2.9

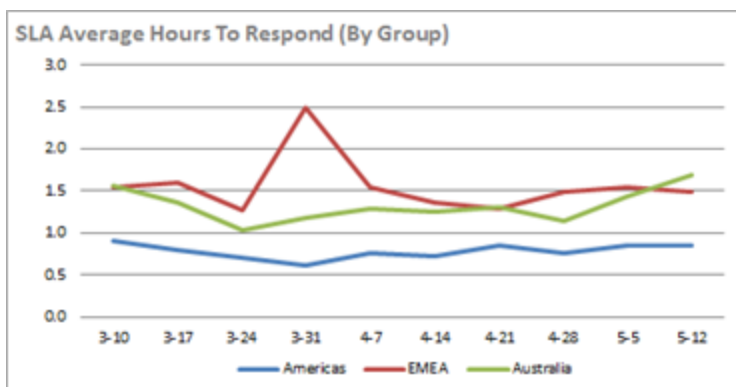
View the number of surveys received (y axis) by week (x axis). Each weekly column is divided by color, with each color representing a range of survey scores. The order of the level of scores from the x axis is from highest score (blue, 4.0 - 5.0) to lowest.

Insight: How many clients are giving low ratings and what is the trending? You can see here which weeks had low ratings. Although 4-21 had a high average survey score, you can see that the volume was lower that week. And in the 10 Day workbook you can really see the impact of one bad score on a day where only two customers responded. But if you have a cluster of days with low scores, the Service Manager might want to pay attention to who has been handling those tickets.

Group Service Levels

These charts provide information about differences in service level between customer groups.

SLA Average Hours to Respond - by Group (Business Hours)



Y Axis = Average response time in 0.5 hour increments

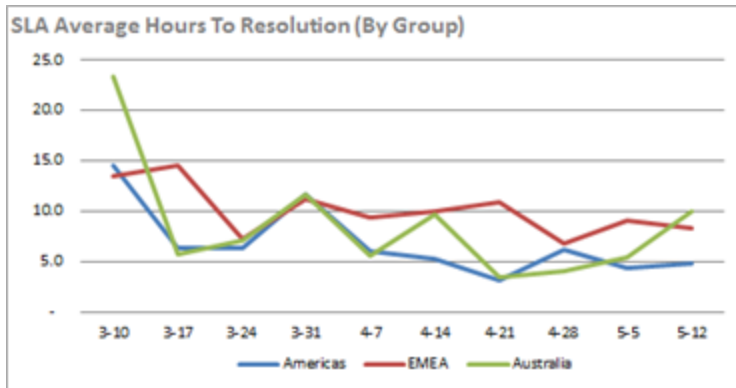
X Axis = Weeks

Customer groups: Blue = Americas, Red = EMEA, Green = Australia

View the average response time (y axis) by week (x axis). Each color represents a different customer group.

Insight: How is each group responding to new tickets? Here you can see that Americas is doing best and trending consistently. EMEA has been performing worst amongst the group with a big spike in 3-31. Australia is trending upwards in the past two weeks.

SLA Average Time to Resolution (By Group)

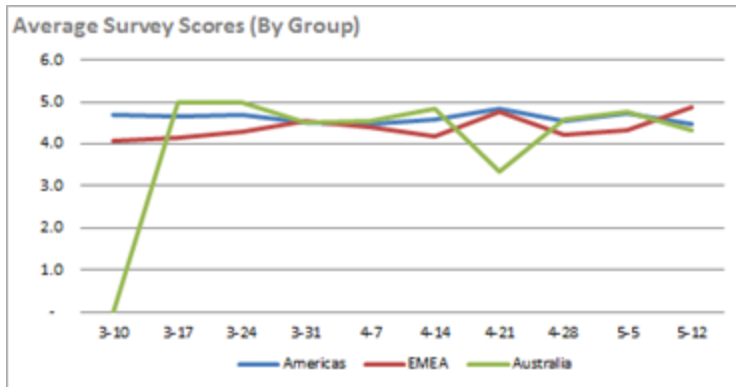


Y Axis = Average time to resolve tickets in 5 hour increments
 X Axis = Weeks
 Customer groups: Blue = Americas, Red = EMEA, Green = Australia

View the average time to resolve tickets (y axis) by week (x axis) for different customer groups. Each color represents a customer group.

Insight: How quickly is each of the groups resolving tickets? You can see in this chart that all groups are improving their average resolution times.

Average Survey Scores (By Group)



Y Axis = Average survey score
 X Axis = Weeks
 Customer groups: Blue = Americas, Red = EMEA, Green = Australia

View the average score received on customer surveys (y axis) by week (x axis) for different customer groups. Each color represents a customer group.

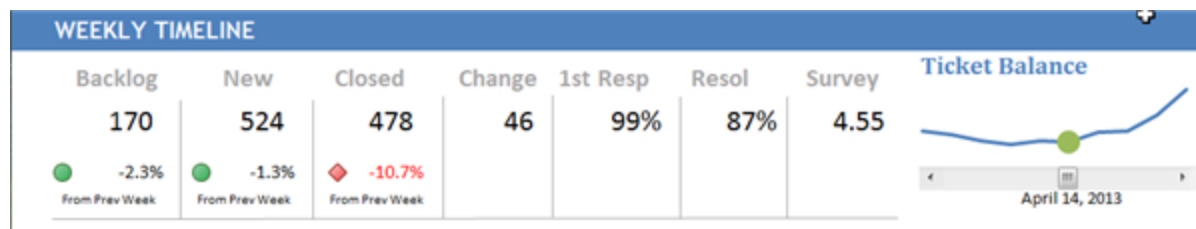
Insight: What are customers saying about the service level provided for each group? The chart shows a consistent performance between 4 and 5 except for a drop by Australia in the week of 4-21. When you see a period of unusually poor response, you can check the survey results and find out more about the customer's experience.

Service Desk Timeline View

This worksheet appears in both Service Desk workbooks.

With this worksheet you can drill into the trends you observed in your 10 Week or 10 Day Ticket and 10 Week or 10 Day SLA charts.

Metrics that Matter



Like other dashboards, the Timeline displays overview figures for Backlog, New and Closed Tickets, the Change between New and Closed tickets, the percent of First Response and Resolved SLA targets met, and the average survey score. These figures are by week or by day. The Backlog, New, and Closed cells display the difference from the previous day in green (good trend) or red (needs improvement).

This Worksheet is Different

The big difference with this View is the **Ticket Balance** line on the right. Notice the date that appears below the blue Ticket Balance line. This date corresponds to the date represented by the green dot on the line and indicates the week or day from which the data in this worksheet was pulled.

You Can Change the Week or Day

To view data for another week or day, simply use the slider below the **Ticket Balance** line to move the green dot to another point on the line. You can select any of the 10 weeks or 10 days represented in the workbook. The selected date displays below the line and the data updates immediately - not only the overview data, but the data in every chart on the page.

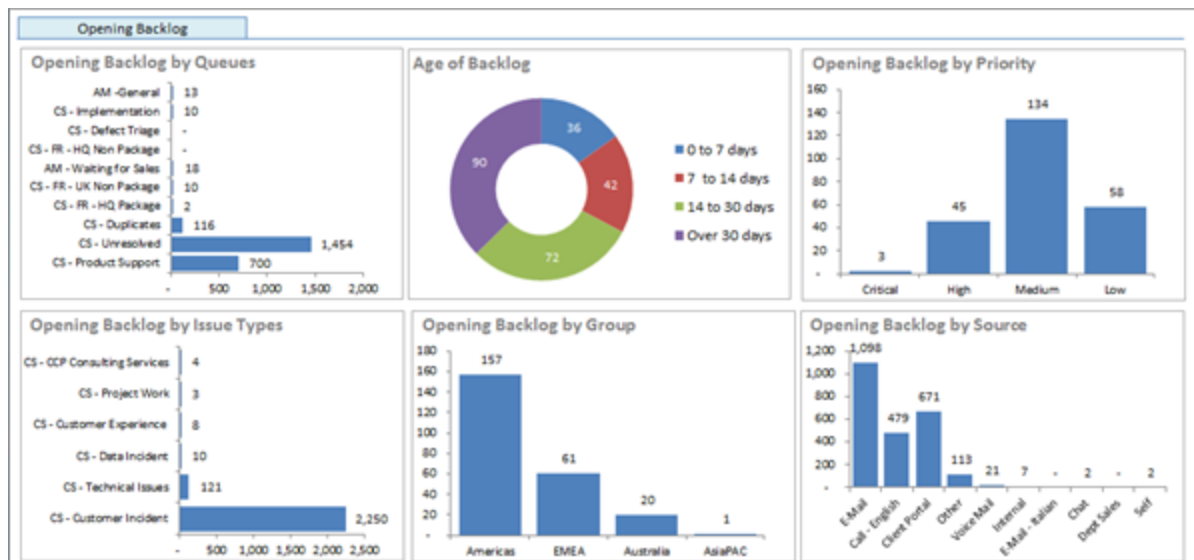
Working with the Charts

These charts display data related to the data groups found in the 10 Week or 10 Day Ticket and 10 Week or 10 Day SLA and Survey Dashboards. When you notice an unusual dip, spike, or trend in the charts from the other worksheets, you can come here and look deeper at the data from that time period.

The chart groups on this page correspond to groupings found on the 10 Week or 10 Day Ticket and 10 Week or 10 Day SLA Dashboards.

Opening Backlog

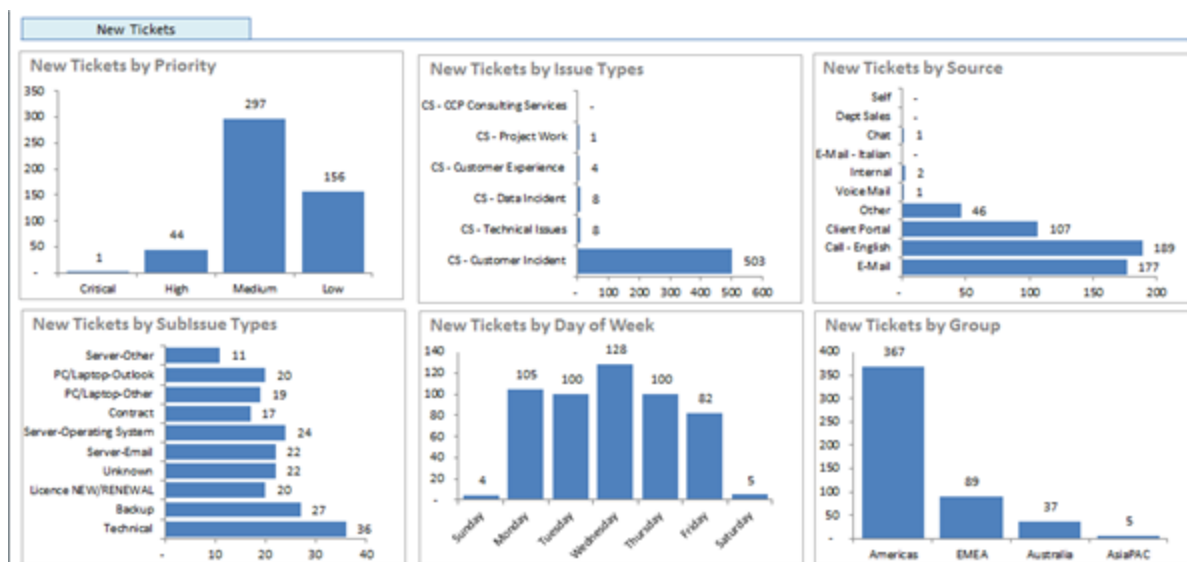
Examine and compare backlog opening balance from different weeks or days by looking at different views: which queues the backlog tickets are assigned to, the age of the backlog, the priority or issue type, and how the backlogged tickets are distributed by customer group or source.



New Tickets

Examine and compare the tickets created in different weeks or on different days by looking at different views: priorities, issue or sub-issue types, the source by which they were generated or the customer group that generated them, and which days of the week they were created on.

The New Tickets by Day of Week chart appears only in the 10 Week Workbook.



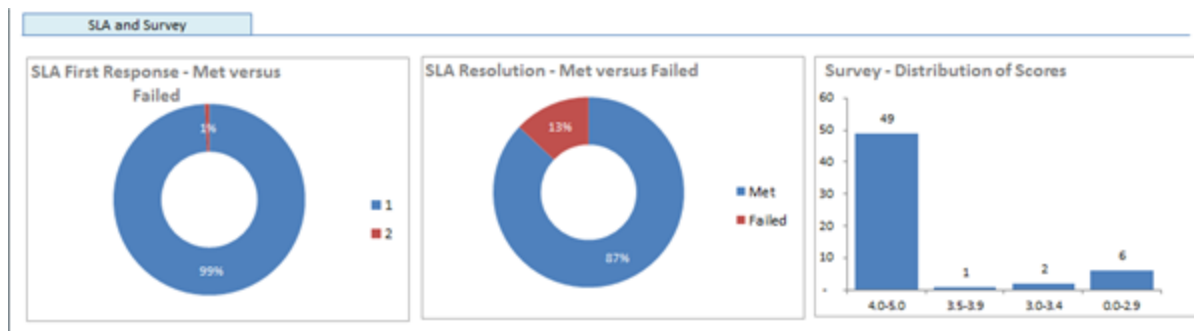
Completed Tickets

Examine and compare tickets completed within different weeks or on different days by issue types, hours worked to complete them, and the groups from which they were generated.



SLA and Survey

Examine and compare your SLA response and resolution results and your survey ratings from different weeks or different days.





Explore Your Data

Click the **Explore tab** to access an interactive worksheet where you can drill down further into your workbook data. Each workbook, Weekly Analysis and Daily Analysis, has an Explore tab.

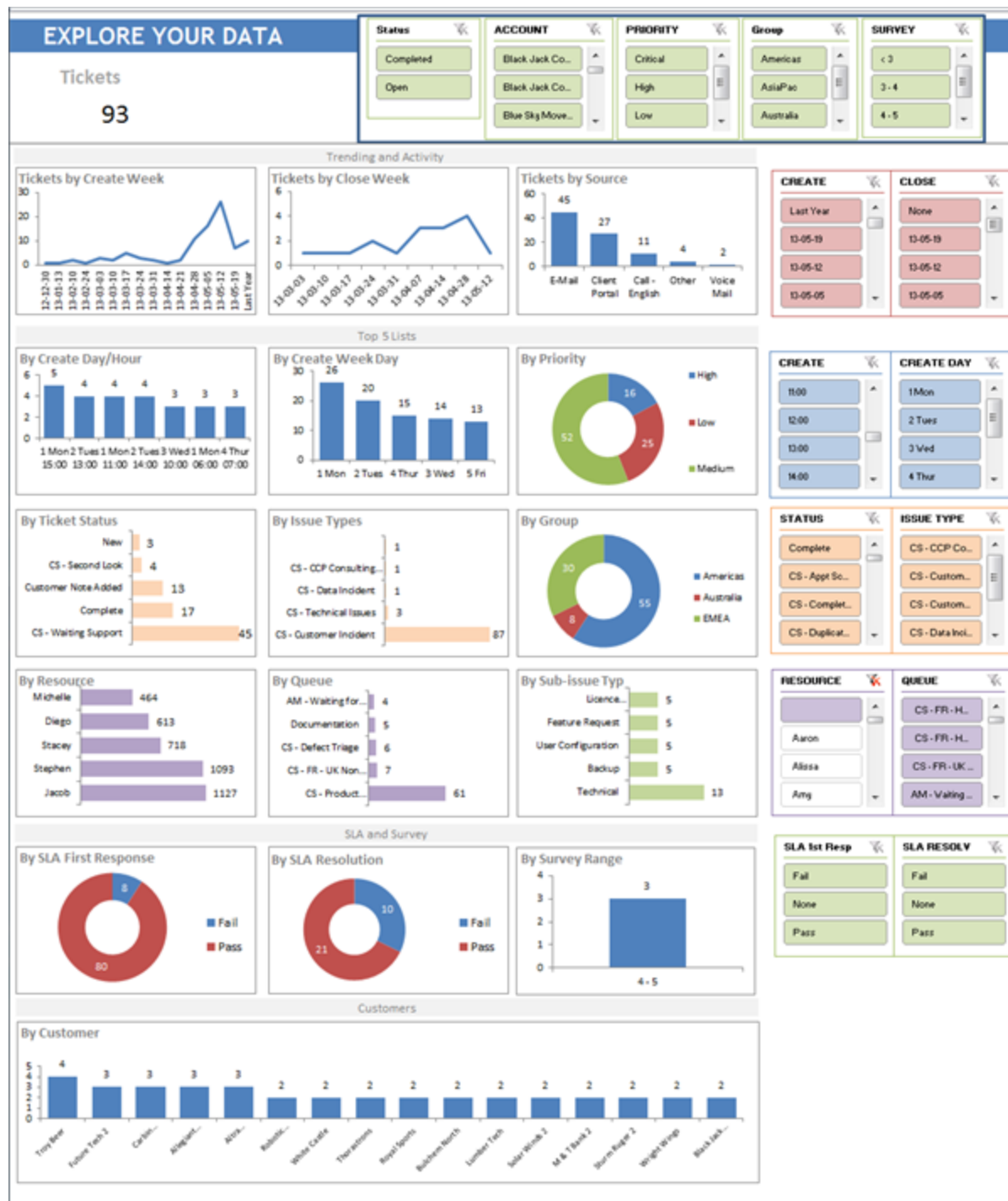
On this worksheet you can apply your own filters to learn even more about your ticket workflow. For example, you could filter all reports by Completed status and High priority. Then, you could view how many of those tickets were created or completed on a particular date, or see how many were in a selected queue, and view the top 5 resources who handled the tickets in that queue.

About the Explore Charts

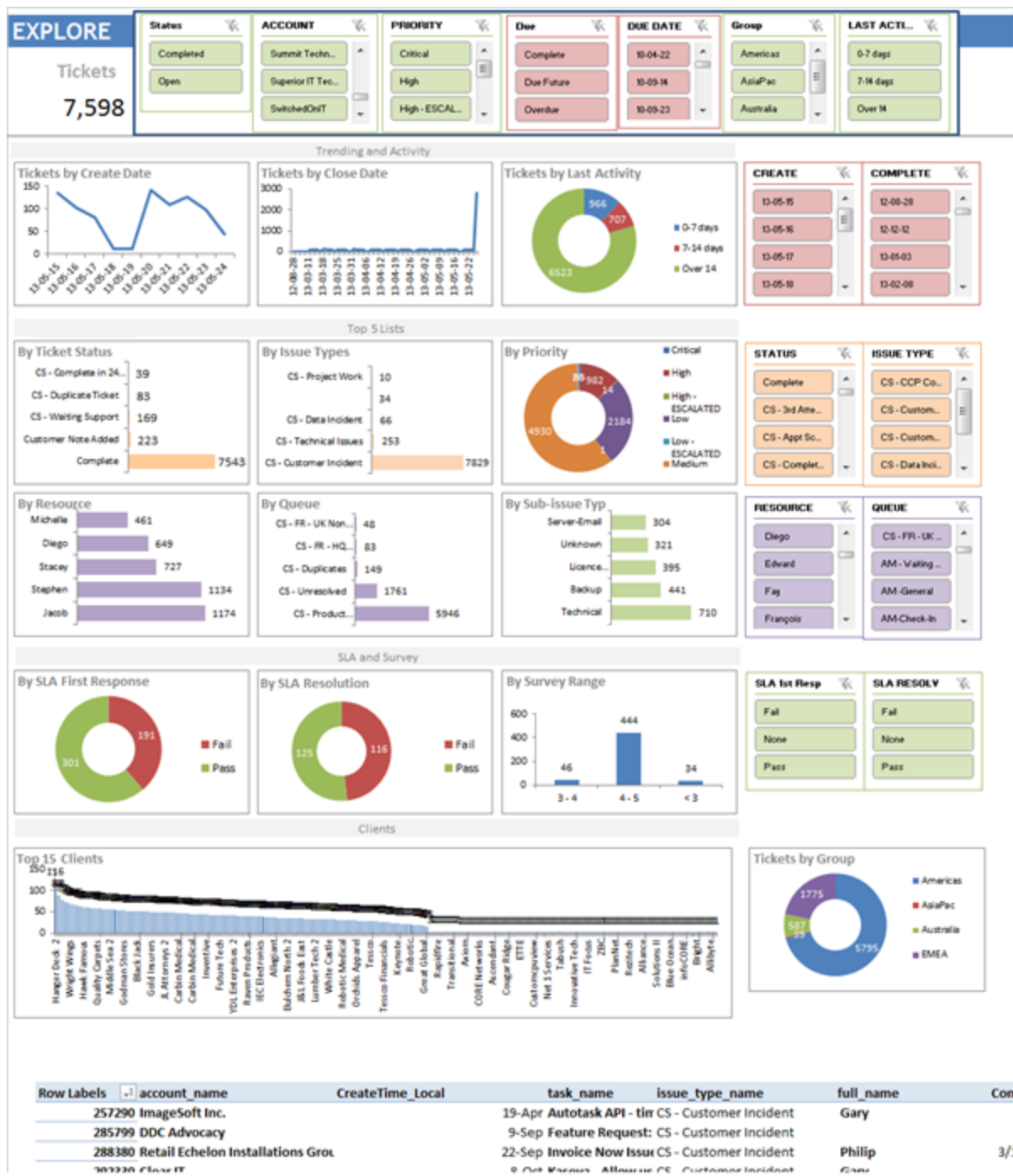
The Explore tab in each workbook has twelve charts grouped under the following headings: Trending and Activity, Top 5 Lists, and SLA and Survey. The charts vary slightly between the workbooks, for example, "Tickets by Last Activity Date" appears on the Daily Analysis Explore page, but not in the Weekly Analysis because last activity date is not as useful when monitoring long term trends as it is for managing day to day service activity.

Each workbook also includes an additional chart that displays ticket information by client.

Weekly Analysis Explore Image



Daily Analysis Explore Image



Ticket Detail List

Scroll down below the charts to view a list of all tickets included in the current display. As you apply filters to the data, the ticket list updates to include only those tickets that meet your applied criteria.



How to Explore

Review the available charts and filters. The filters appear across the top of the page and down the right side of the page. Decide which filters will focus in on the data that will be most useful. Then apply the filters. Remember that you can apply additional filters on the results, and clear one or more filters at any time.

Apply Filters

Filters with longer lists of criteria provide a 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.

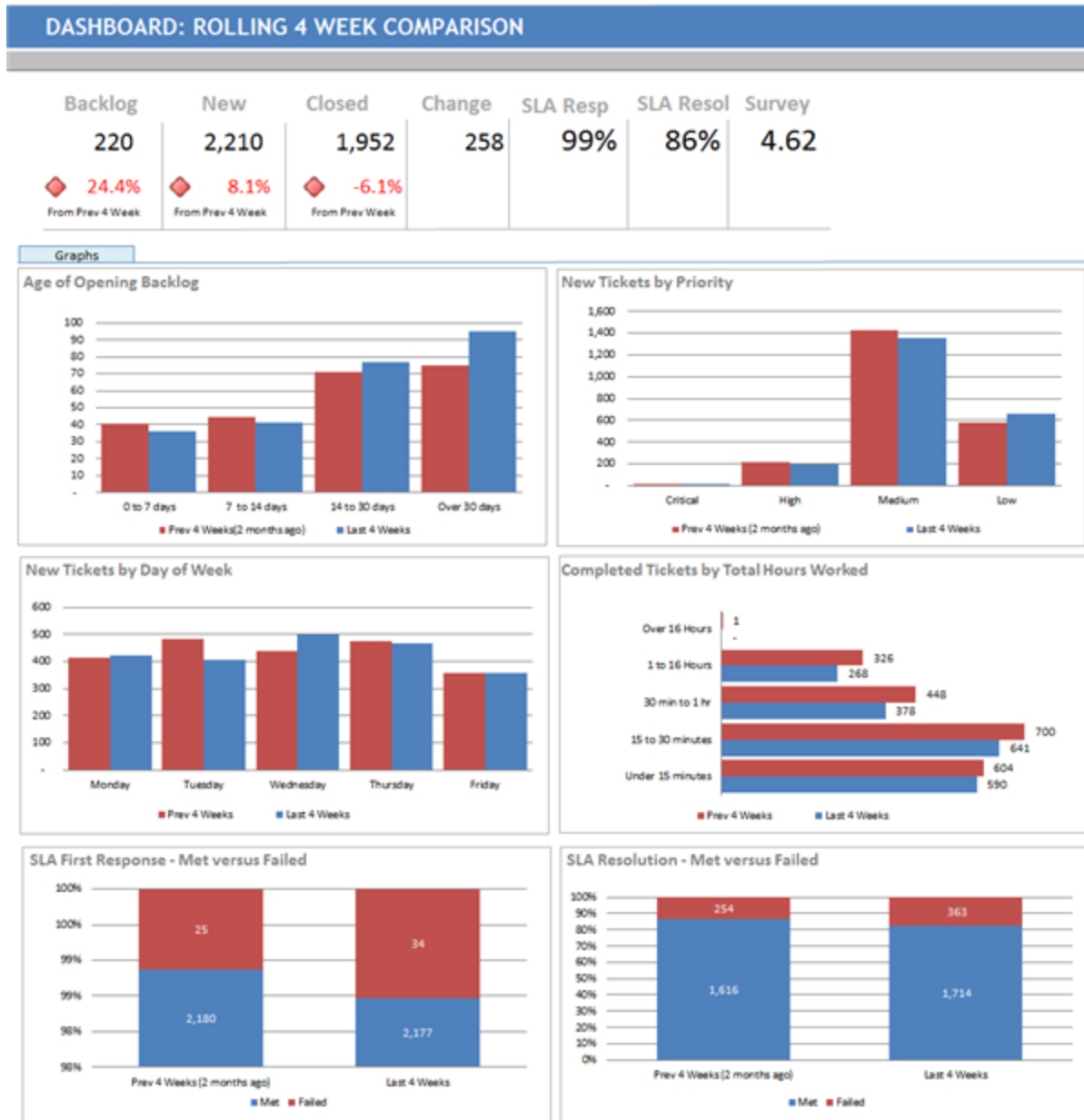
- To clear filters, click the filter icon next to the filter name.

The charts update immediately and the Ticket count at the top of the page updates to reflect the number of tickets included in the current data set. The ticket list below the charts updates to include only tickets that meet your selected criteria. You can apply additional filters as needed.

Dashboard: Rolling Four Week Comparison

The Rolling Four Week Comparison analytics worksheet is available only in the Weekly Analysis workbook. It provides simple charts loaded with valuable data to monitor the activity of your service business over the previous eight weeks.

 Hover your cursor over any data element in the chart to see details about the element.





Metrics that Matter

The 8 week View displays the same critical high level data as the 10 Week View and 10 Week SLA view with one important difference. The text under the Backlog, New, and Closed numbers indicates the difference from the previous 4 weeks in green (good trend) or red (needs improvement).

Graphs

The six graphs display an overall view of the following indicators during the previous two months:

- Age of the tickets in backlog
- New tickets by priority
- New tickets by day of week they were created
- Total of hours worked on tickets completed
- Percentage of SLA first response targets met or failed
- Percentage of SLA resolution targets met or failed

Insight: The purpose of this worksheet is to provide insight into key metrics from an aggregated four week data perspective. Sometimes, trends do not appear until there are sufficient data points available. As such, comparing most recent four week data to previous four weeks allows for more effective trend detection.

Ticket Backlog Dashboard

This worksheet is available only in the Daily Analysis workbook. It includes a collection of charts that provide a quick assessment of your ticket backlog. Every day, Managers can quickly see the current age of backlog tickets, whether they are being actively worked on, and what types of tickets remain in backlog based on key ticket characteristics.



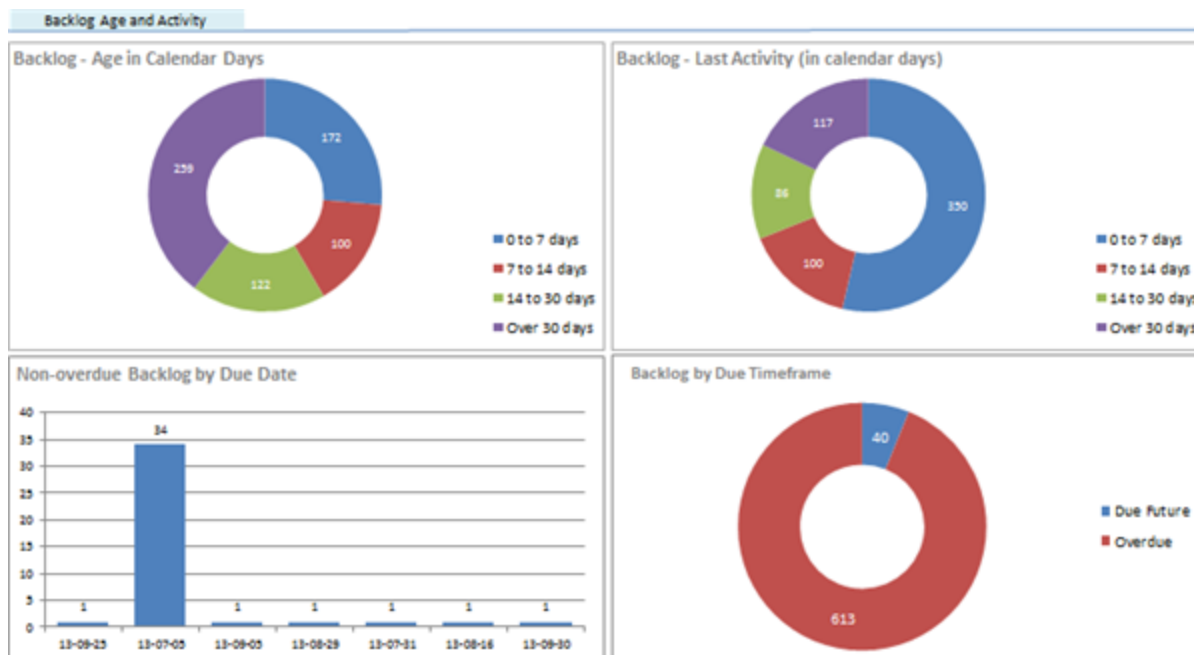
Remember to hover your cursor over any data element in the chart to see details about the element.

Backlog Tickets by Age and Activity

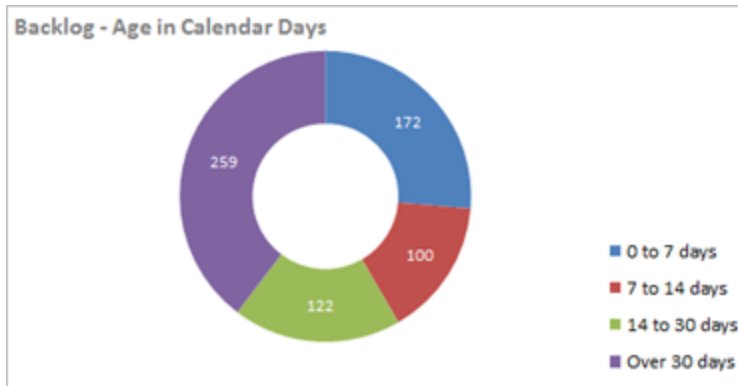
The first group of four charts breaks down the backlog by age and activity.



You can adjust the date ranges used in the charts to assess backlog age and elapsed time since last activity. Refer to "Customizing Your Data Display" on page 49.



Backlog Age in Calendar Days

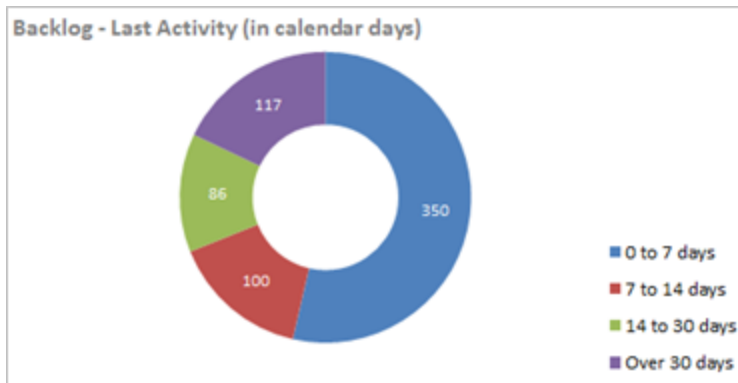


Blue = 0 to 7 days, Red = 7 to 14 days, Green = 14 to 30 days, Purple = Over 30 days

Quickly assess the age distribution of tickets in backlog. Each sector represents a time range. The number in the sector = the number of backlog tickets whose age falls within that range of time.

Insight: In this example, there are more tickets over 30 days old than in any other group. It would be worth taking a closer look at these tickets in the Explore tab to find out details like who is assigned to them, whether they fall into any particular issue or sub-issue types, of issues and sub-issues, and to make sure there are no high priority tickets in the group.

Backlog - Last Activity (in calendar days)



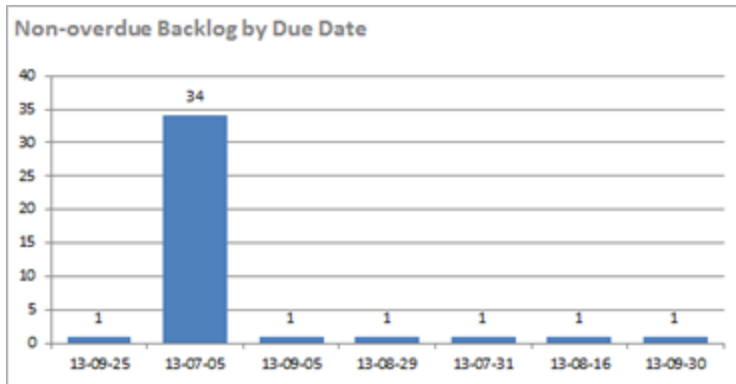
Blue = 0 to 7 days, Red = 7 to 14 days, Green = 14 to 30 days, Purple = Over 30 days

Each sector represents a time range. The number in the sector = the number of backlog tickets whose age falls within that range of time.

Quickly assess how many tickets have been worked on recently, and how many tickets have gone longer periods without any activity.

Insight: In the example, a large number of tickets have not been worked on in over thirty days. This could indicate that your resources are having difficulty resolving the issues, or resources are not closing tickets even though the work has been completed for some time.

Non-overdue backlog by due date

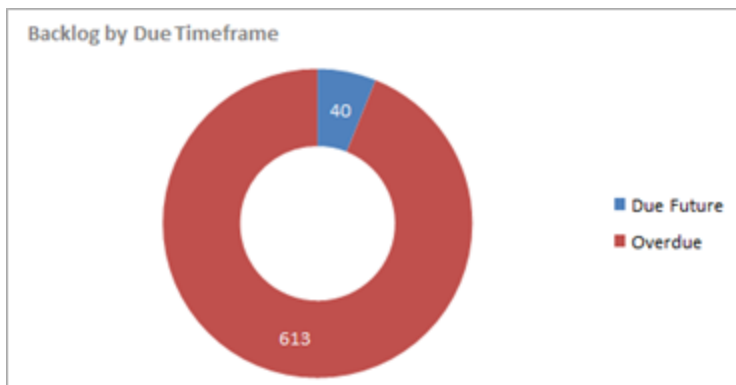


Y Axis = Number of tickets
X Axis = Ticket due date

Quickly assess the distribution of due dates for tickets in backlog that are not yet overdue.

Insight: Not all tickets in backlog are overdue. If there is still a sufficient time before some tickets are due, and you have a large number of overdue tickets in backlog, you may want to use more resources to close overdue tickets first.

Backlog by Due Timeframe



Blue sector = Number of tickets not yet due
Red sector = Number of tickets overdue

Quickly assess how many backlog tickets are overdue compared to those that are due in the future.

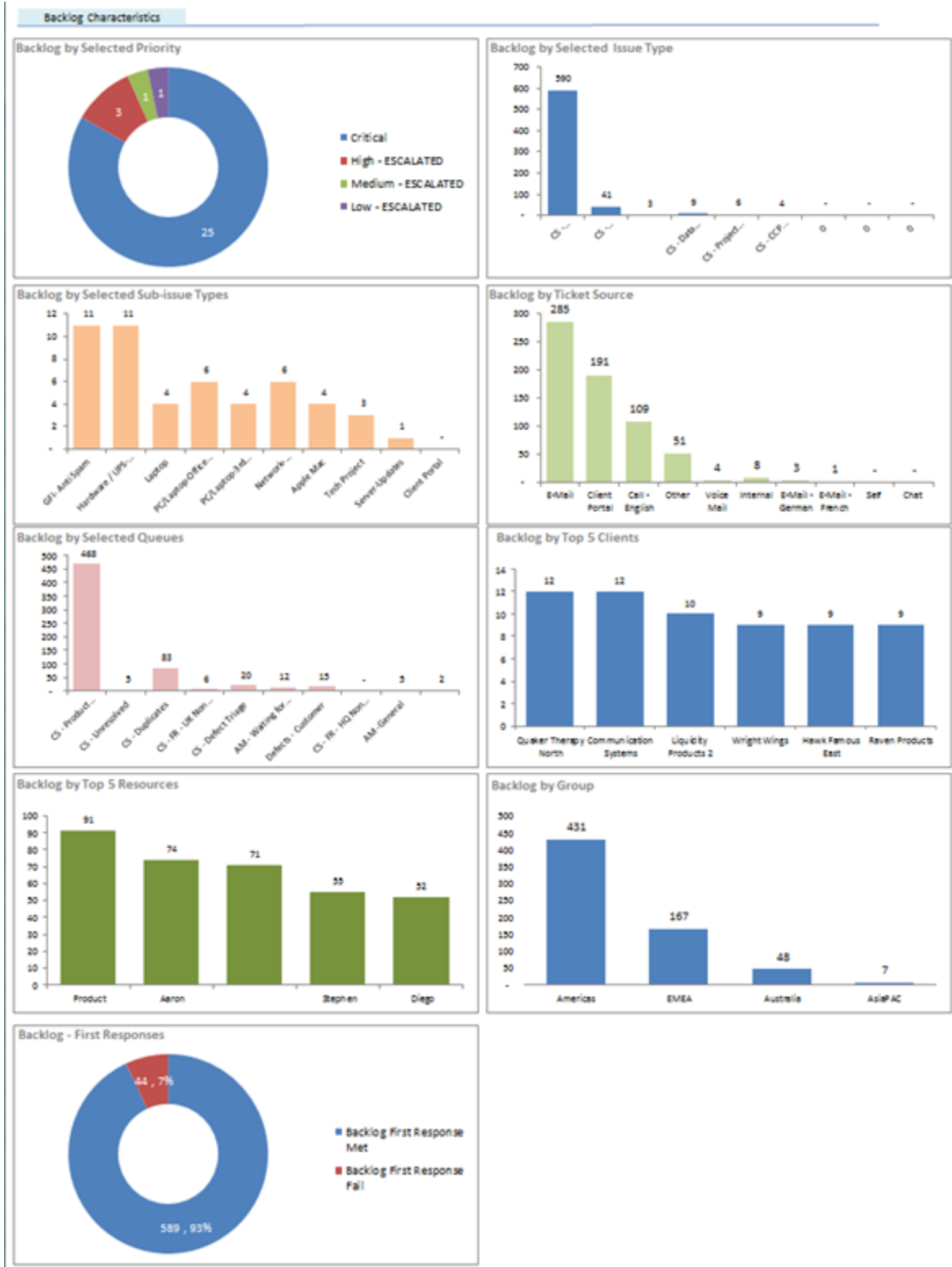
Insight: This very simple chart indicates how many tickets in backlog are overdue compared to those that are not yet due. It is apparent in this example that the number of overdue tickets is too high and some action is needed to correct the situation.

Backlog Tickets by Key Characteristics

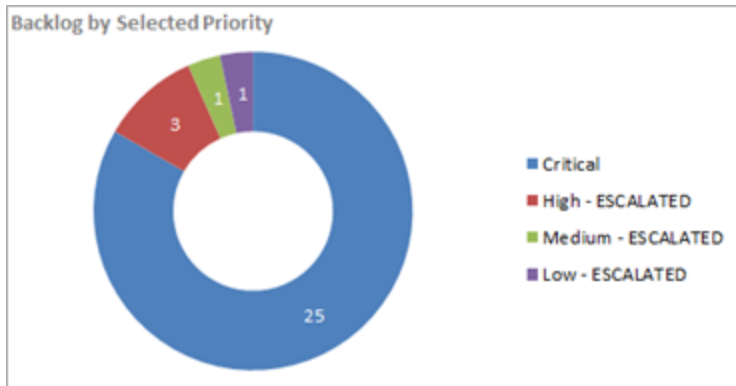
The second group of nine charts displays the backlog by important ticket characteristics, including priority, issue and sub-issue type, ticket source, queue, group, first response met, and the 5 clients and 5 resources associated with the highest number of tickets in backlog.



For charts that display selected characteristics, for example, Priorities or Queues, you can change the selected elements to better fit your areas of concern. Refer to **"Customizing Your Data Display"** on page 49.



Backlog by Selected Priority



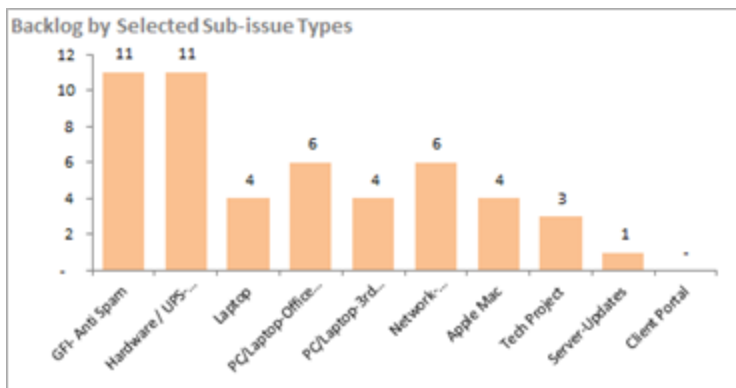
Blue = Critical, Red = High - ESCALATED, Green = Medium-ESCALATED, Purple = Low

Each sector represents a ticket priority. The number in the sector = the number of backlog tickets assigned that Priority.

View the number of backlog tickets assigned to each of the selected priorities. Your company may have additional priorities that are not included in the display.

Insight: If you see that there are a high number of Critical tickets in backlog, you should dig deeper. Are there suddenly a large number of outstanding issues that will prevent your clients from running their business? Are there critical issues that cannot be resolved? Or is there a new resource taking calls and over-estimating the priority level?

Backlog by Selected Ticket Characteristic (Four charts: Issue Type, Sub-Issue Types, Ticket Source, or Queues)



On the Backlog worksheet, the four charts that display the backlog by selected ticket characteristic each use the design format described here. This image represents only one chart as an example.

The x and y axis descriptions apply to each of the four selected characteristic charts.

Y Axis = Number of tickets

X Axis = The different categories of the selected characteristic. In the example, the characteristic is Sub-Issues, so the x axis displays the sub-issue type.

Quickly view the distribution of backlog tickets across the categories of the specified characteristic.

Note: The chart may not include all categories for the specified characteristic.

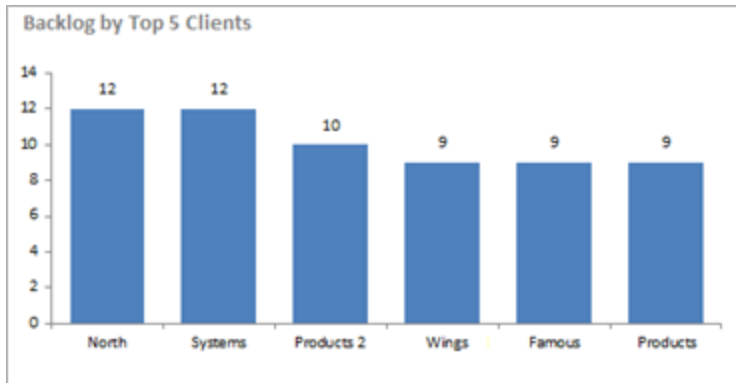
Insight: Is there one category in any of the four characteristic charts that consistently has a large number of backlog tickets? This might be because that particular category is assigned to more new tickets than other categories. If not, than there may be a problem that prevents closing the tickets in a reasonable time.

Backlog by Top 5 Clients or by Top 5 Resources (Two charts)



On the Backlog worksheet, two charts use a "top 5" grouping arrangement to display the backlog data. They are Top 5 Clients and Top 5 Resources. Both use the design format described here. This image represents only one chart as an example.

The x and y axis descriptions apply to both charts.



Y Axis = Number of tickets

X Axis = The 5 clients, or 5 resources, that are associated with the highest number of backlog tickets.

Quickly see which clients have the highest number of tickets in backlog, or which Resources are assigned to the highest number of tickets in the backlog.

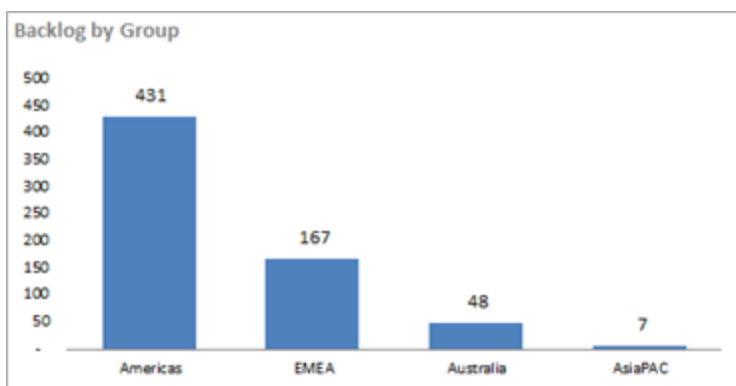
Insight: When you see which resources have the most tickets in backlog, you can determine if they are taking too long to resolve their tickets. Or, maybe they are your trouble shooters who generally handle a larger volume of tickets.

Why do the top 5 clients have so many tickets in backlog? You'll want to know if there are problems resolving the issues or working with the client. And if the number is unusually high, you will want to make sure that your support team is keeping the client updated.

Backlog by Group



This chart uses the same design as the charts for Backlog by Issue Type, Sub-Issue Type, Ticket Source, and Queues. The chart displays the ticket backlog by group, filtering by the same groups that appear throughout the service desk workbook.




Y Axis = Number of tickets

X Axis = The main ticket groups.

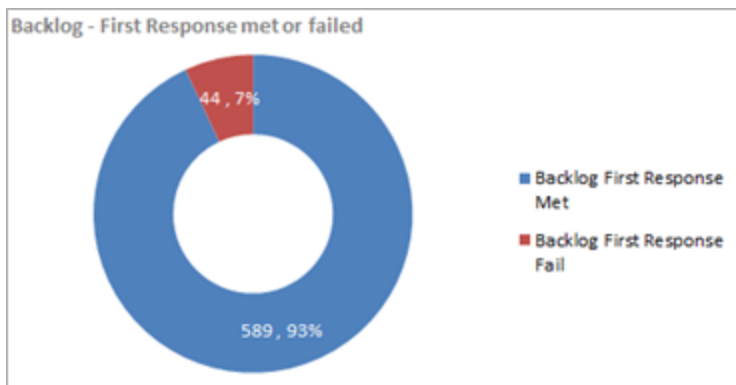
Quickly view the distribution of backlog tickets across the ticket groups.

Insight: Which ticket group is associated with the highest number of backlog tickets? If this group does not also create the highest number of tickets, why are so many tickets in backlog? And, if the group normally creates the highest number of tickets, but suddenly there are even more tickets in backlog than usual, is there a problem with resolving those tickets?

The standard groups displayed in this chart represent your top three ticket queues (by ticket count) and a group that contains the tickets from all other queues. You can change the labels for these groups, but unlike the other characteristic charts, there are no other groups which you can select to include in the chart.

 You can change the basic group, for example, instead of grouping by queue, you could group by Issue Type or Priority. To switch the basic characteristic represented by your groups, please contact Autotask Customer Support for information. Refer to "Take Your Workbook to the Next Level!" on page 46.

Backlog - First Response Met or Failed



Blue = Backlog First Response Met
Red = Backlog First Response Failed

The number in each sector = the number of backlog tickets included in the sector.

Quickly assess how many of the tickets in backlog met their Service Level Agreement first response target.

Insight: This simple chart gives an immediate assessment of how you are doing with meeting the first response goal for your SLAs (Service Level Agreements). If you are not using SLAs, this chart will not contain any meaningful data. To find out more about SLAs, refer to this topic from the Autotask Online Help system: [Working with Service Level Agreements in Autotask](#).

Data Analysis and Tickets Detail Tabs

The final worksheets in the Service Desk Workbooks display all the data that provides the basis for every chart in the workbook.

Service Desk Ticket Analysis

On this worksheet you can view the raw numbers for all the data for all the tickets in your current data download. Data is presented by Current Week, Last Week, Previous Week, Last 4 Weeks, Previous 4 Weeks (weeks before last 4 weeks) and by week for all 10 weeks included in the data set.

Metrics that Matter

The first 10 lines of data represent the key indicators of your service workflow. View the figures for Opening Balance, Backlog Over 30 Days, Tickets Opened, Tickets Completed, (tickets) Added to Backlog, 5 of First Response Met, Average Time to Respond, % of SLA Resolutions Met, Average Time to Resolve, and Average Survey Score.

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

Additional Data

The additional data in this worksheet is presented in groups: Opening Balances, Tickets Opened, Tickets Closed, and Service Levels. Each group is further grouped by criteria like Queue, Source, Group, etc. and then sorted by the options available for each group.

For example, under Tickets Opened, tickets are sorted by Priority and then by Priority Type, for example, Critical, High, Medium and Low. A simple weekly trend spark graph is presented for each line and totals are provided for each group.



Backlog Analysis (Daily Analysis only)

This worksheet is only available in the Daily Analysis workbook. It displays, in table format, all data included in the calculations for the Backlog tab in the Daily Analysis workbook. It is similar to the Ticket Analysis except that instead of viewing the data by day or week, this table presents the data by Resource. That is, for each resource you can view the number of tickets associated with any of the characteristics that appear in the Backlog worksheet.

Ticket Detail Data

This worksheet lists every ticket in your data download. It provides, for each ticket, all related data downloaded from the Report Data Warehouse views.

To filter or change the sort order of this list, click the down arrow in the header of the column you want to use for your primary sort. Select your preferred sort and filter options. If you are not familiar with sorting and filtering in Excel, please check Microsoft Help and online articles.



To filter the total list of tickets by ticket attribute, date range, or other criteria, use the Explore tab. When you apply the filters available on that worksheet, the list of tickets below the charts updates to include only those filters that fit the filter values. Refer to **"Explore Your Data"** on page 31.

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 62.

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 47.

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 49.

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:

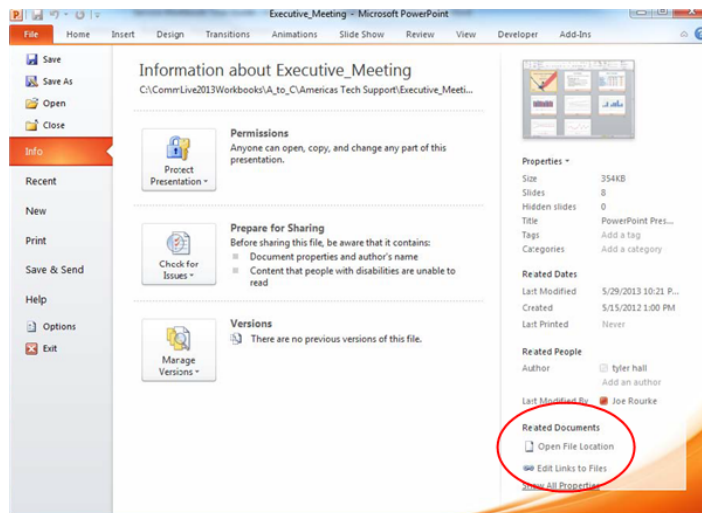
- How to link the charts in the sample presentation to your own workbook.
- How to add additional linked charts to the sample presentation or to your own presentations.
- How to update charts in your presentation.

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.

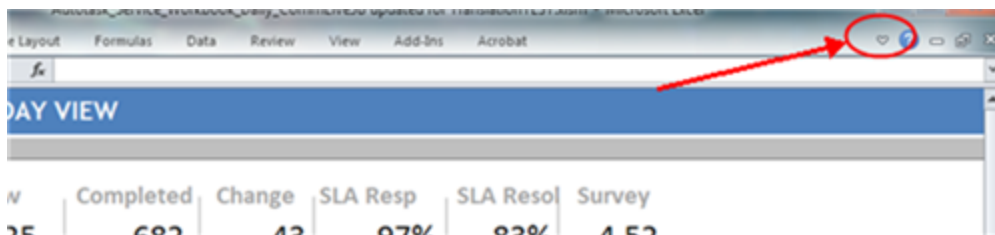
One more important note:

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.



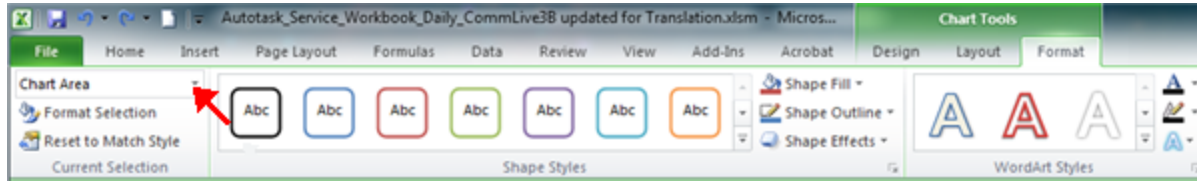
- To hide the ribbon, click the arrow again.

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		428	300	220	227	77	222	204
13	Backlog Over 30 days		108	100	96	95	75	64	68
14	Tickets Opened		556	599	589	553	511	479	506
15	Tickets Completed		534	471	509	488	520	497	536

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.

	Opening Balances	BY PRIORITY
25	Critical	0
26	High	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.

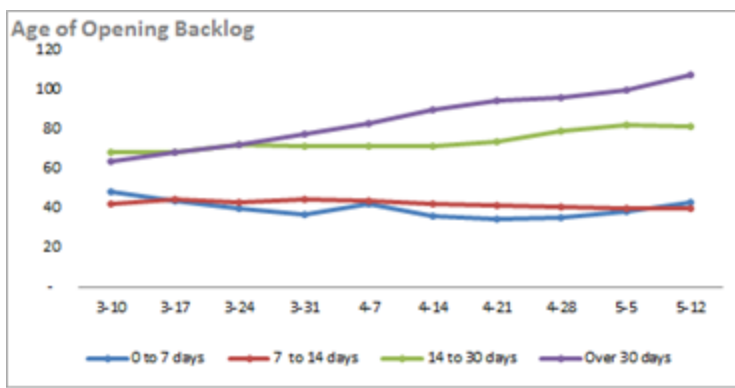
To add or change the Target value:

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.

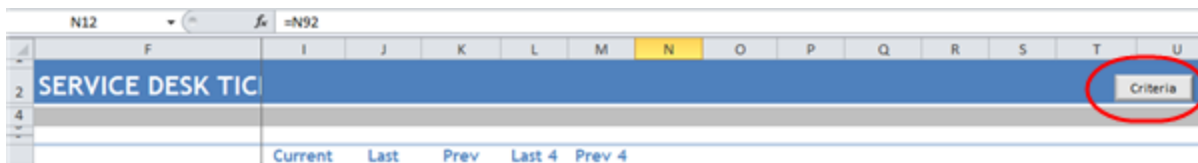


All chart ranges and data are specified on the Data Analysis tabs in each workbook: Service Desk, Ticket Analysis; Sales, CurrentFY and PreviousFY; and FinancialsCurrent and FinancialsPrevious.

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).

Row Id	Criteria1	Criteria2	Criteria3	Category	CurrWeek	PrevWeek	Column	4Week	Prev4Week	Week
7				Criteria Start Date -->	N/A	N/A		N/A	N/A	10-Mar 17
8				Criteria End Date -->	N/A	N/A		N/A	N/A	16-Mar 23
Opening Balances					Current Week	Last Week	Prev Week	Last 4 Weeks	Prev 4 Weeks	10-Mar 17
								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.

Row Id	Criteria1	Criteria2	Criteria3	Category	CurrWeek	PrevWeek	Column
7				Criteria Start Date -->	N/A	N/A	
8				Criteria End Date -->	N/A	N/A	
BY AGE OF BACKLOG					Current Week	Last Week	Prev Week
80				0 to 14 days			
81	Age of Backlog	0	14	14 to 45 days	43	38	36
82	Age of Backlog	14	45	45 to 120 days	40	40	41
83	Age of Backlog	45	120	Over 120 days	82	82	80
84	Age of Backlog	120	999999		108	100	96
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 62.



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](#)". 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 56.



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 49.



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 47.

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 49.

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 61.



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 58, and "About the Workbooks Data Cache" on page 61.

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