Autotask Professional
Services Automation

Performance Analytics:
All Workbooks

User Guide

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Services Automation

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 6

Looking for information about a specific workbook?

If you are reading the Performance Analytics: All Workbooks User Guide, you can use the following links to go directly to information on a specific workbook:

"Using the Service Desk Workbooks" on page 24

"Using the Client Workbooks" on page 61

"Using the Sales Workbook" on page 83

"Using the Financial Workbook" on page 122

"Using the Projects Workbook" on page 167

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 196

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.

- "Using the Service Desk Workbooks" on page 24

- "Using the Client Workbooks" on page 61

- "Using the Sales Workbook" on page 83

- "Using the Financial Workbook" on page 122

- "Using the Projects Workbook" on page 167

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.

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3. Optionally, enter an **'Advanced Where'** clause to selectively limit the amount of data that is downloaded. The number and type of advanced where clauses will vary depending on which workbook you are configuring. You can skip this field now and add an Advanced Where Clause at a later time. Refer to "Add or Update an Advanced Where Clause" on page 20.

4. Click **Next Step**. In the next minute or two (subject to connectivity and quantity of data), your workbook will:

   Connect to your Workbooks Data Cache, download your site configuration and write it to the workbook.

   Download the data required for the workbook, for example, ticket data for a weekly or daily service workbook.

   Recalculate and update all workbook charts.

5. When the configuration and download are complete, complete the additional Config tab options described below.

Company Name

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

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

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

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

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

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

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

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

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

The **Service Desk** and **Client Workbooks** fiscal year is based on the calendar year. The Config page does not include a Fiscal Year option. If you need to change the fiscal year for a Service Desk or Client workbook, please contact Autotask Customer Support. Refer to "Contacting Customer Support" on page 196.

- 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 20.

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 24, "Using the Client Work-books" on page 61, "Using the Sales Workbook" on page 83 , "Using the Financial Workbook" on page 122 or "Using the Projects Workbook" on page 167.

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 work-book 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 Con-figuration" on page 7**.

> 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 envir-onment .

For more information on the workbook data, refer to "About the Workbooks Data Cache" on page 195.

There's More!

To learn about more options to customize your workbook , refer to "Take Your Workbook to the Next Level" on page 12.

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 196.

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 196.

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 22.

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 13.

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.
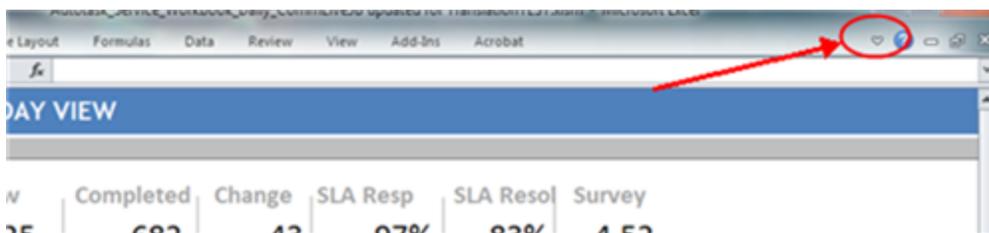
- To hide the ribbon, click the arrow again.

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

1. Click to select a **chart** or an element in the chart.

   The Chart Tools tab appears in the Excel ribbon.

2. Select the **Format**, **Design**, or **Layout** tab.

3. In the **Layout** or **Format** ribbon, in the **Current Selection** area, select the element of the chart you want to format from the menu.
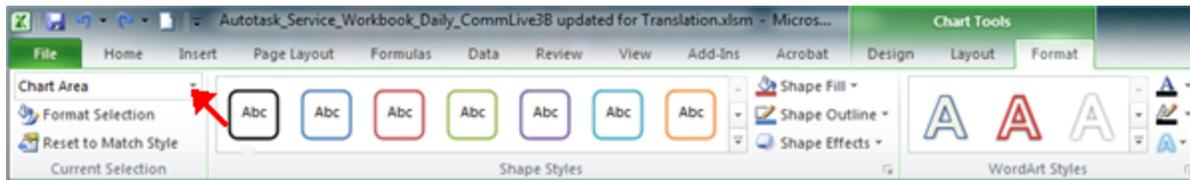
This menu does not appear in the Design ribbon.

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.

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.

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.
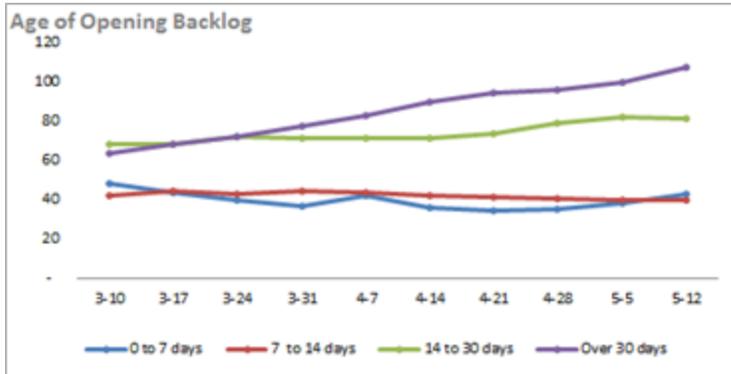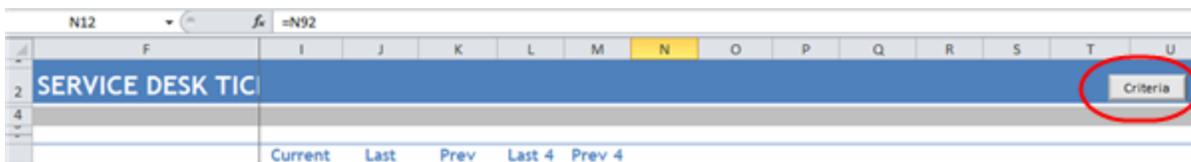

All chart ranges and data are specified on the Data Analysis tabs in each workbook: Service Desk, Ticket Analysis; Sales, CurrentFY and PreviousFY; and FinancialsCurrent and FinancialsPrevious.

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

View a video: Performance Dashboards: Configure Your Trending Criteria 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).

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.

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 You 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 defaultYou 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 196.

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')

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.
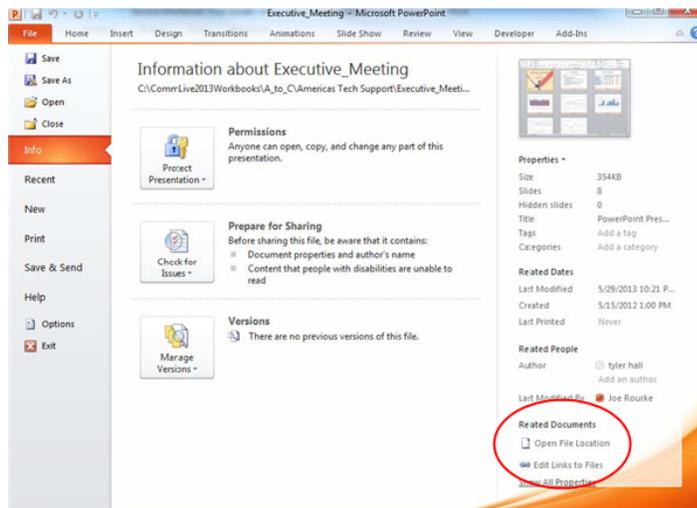
3. In the Links window, select an individual link and click Change Source.

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.

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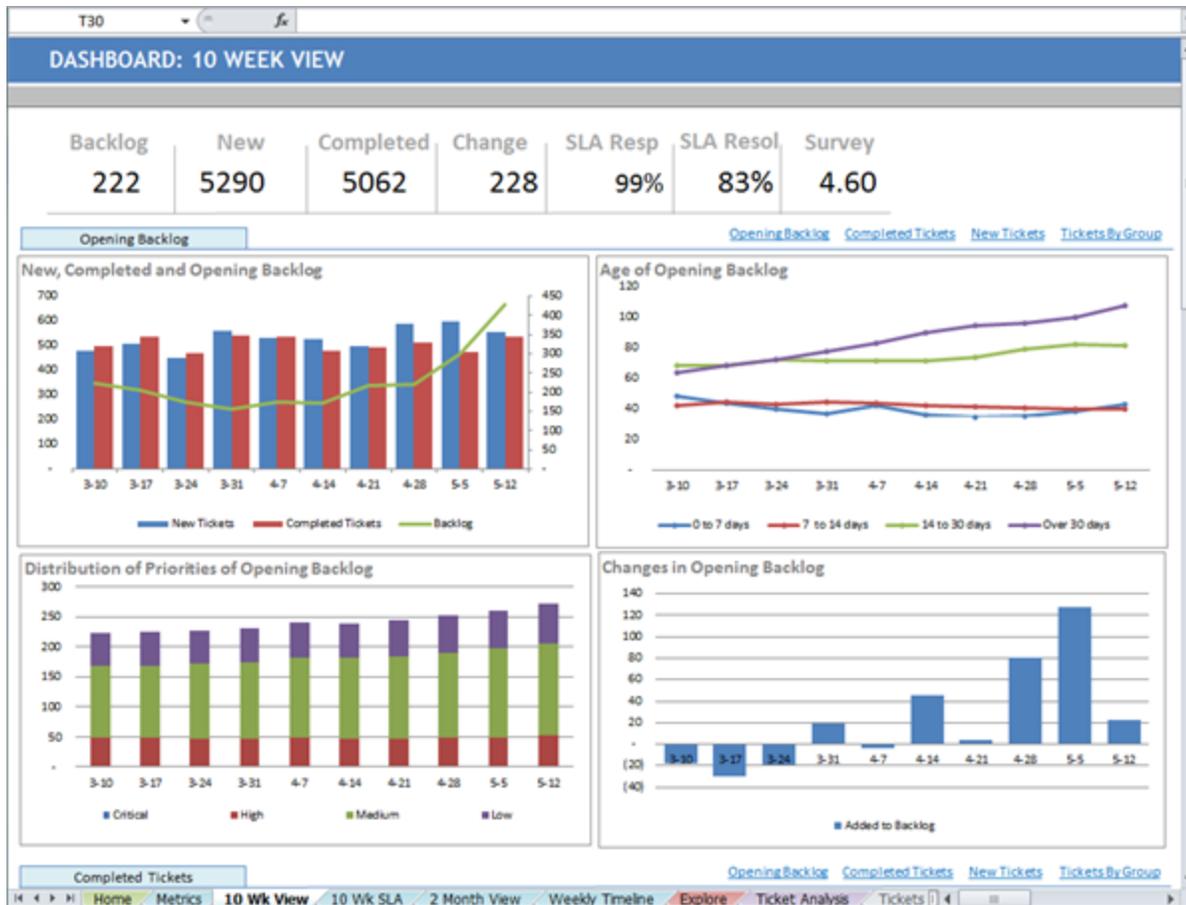
There are two Service Desk Workbooks to help you analyze the trends in the Service workflow of your business. Each presents key data about your tickets from start to finish so you can determine what is working and where there are potential problems.

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 work-flow is performing.

	This Week 5/12/2013		Last Week 5/5/2013		2 Wks Ago 4/28/2013	10 Week Trend	10 Week Met Plan	Target
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 28.

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 29.

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 29.

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 46.

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 48.

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 43.

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 55.

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 59.

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 48.

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 59.

Viewing Key Service Metrics

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

	This Week 5/12/2013		Last Week 5/5/2013		2 Wks Ago 4/28/2013		10 Week Trend	10 Week Met Plan	Target
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 13.

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
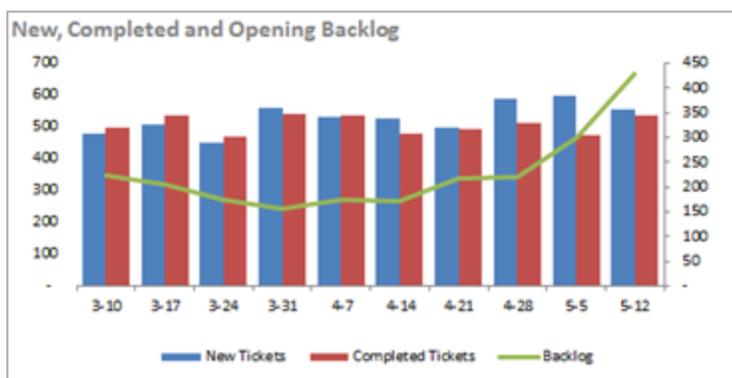
Y Axis = Number of tickets
X Axis = Weeks
Secondary value axis = Number in Backlog

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
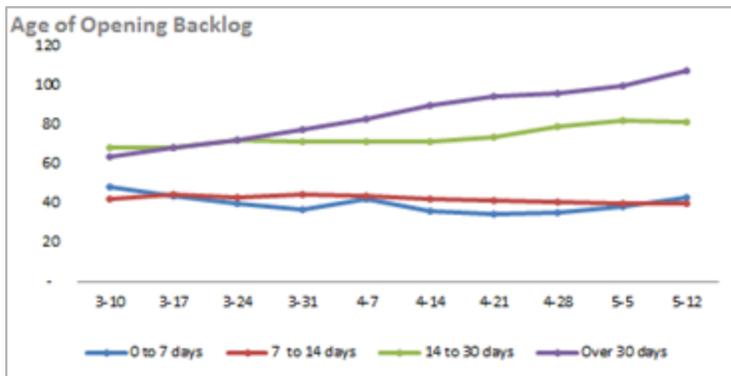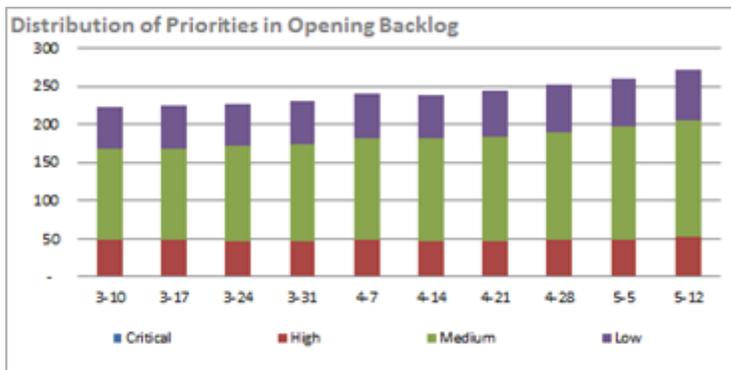

Y Axis = Number of tickets
X Axis = Weeks
Blue = 0 - 14 Days, Red = 7 - 14 Days, Green = 14 - 30 Days,
Purple = Over 30 Days

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.

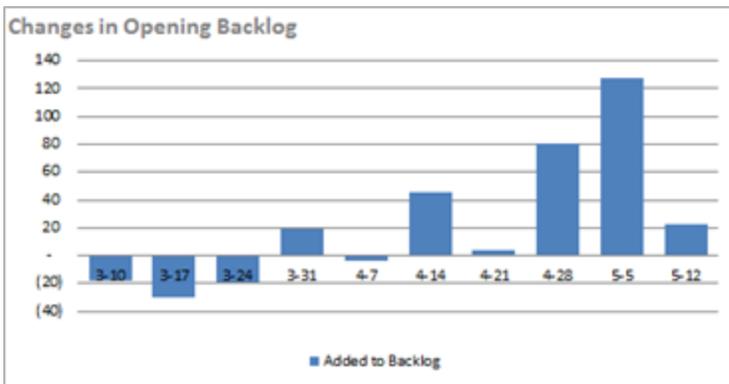

Y Axis = Number of tickets
X Axis = Weeks
Blue = Critical, Red = High, Green = Medium, Purple = Low

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
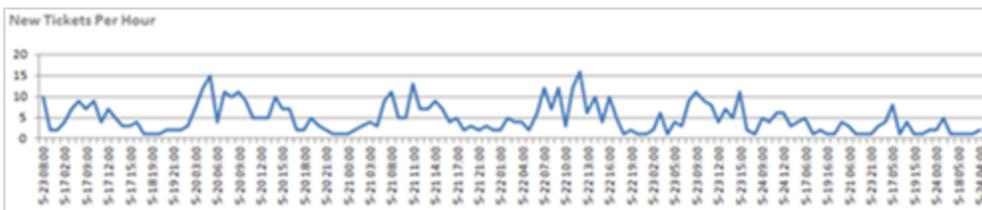

Y Axis = Number of tickets
X Axis = Weeks
Blue = Total tickets

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
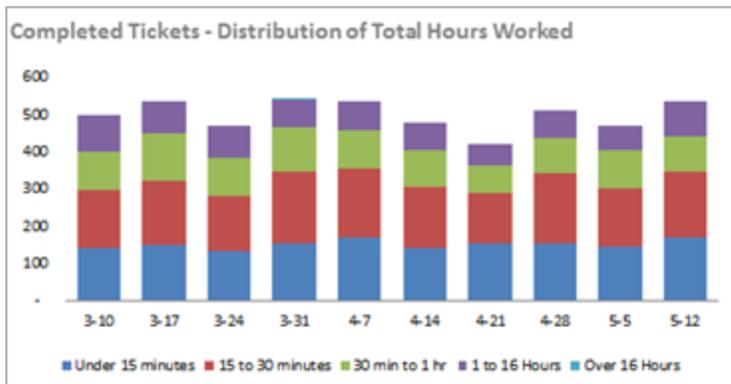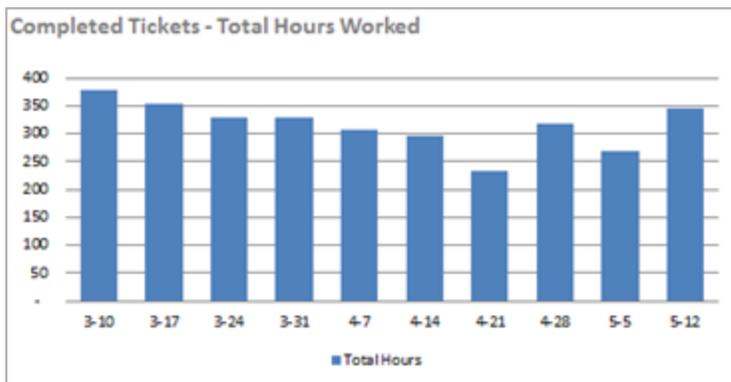

Y Axis = Number of tickets
X Axis = Weeks
Blue = Under 15 minutes, Red = 15 - 30 minutes, Green = 30 minutes - 1 hour,
Purple = 1 to 16 hours, Turquoise = Over 16 hours.

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

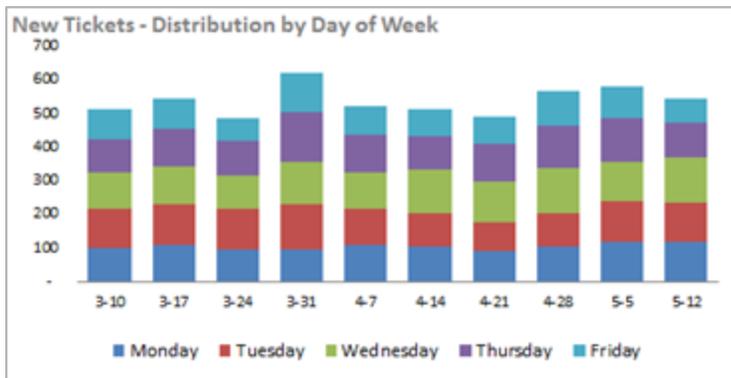Y Axis = Number of tickets
X Axis = Weeks
Blue = Total hours

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)
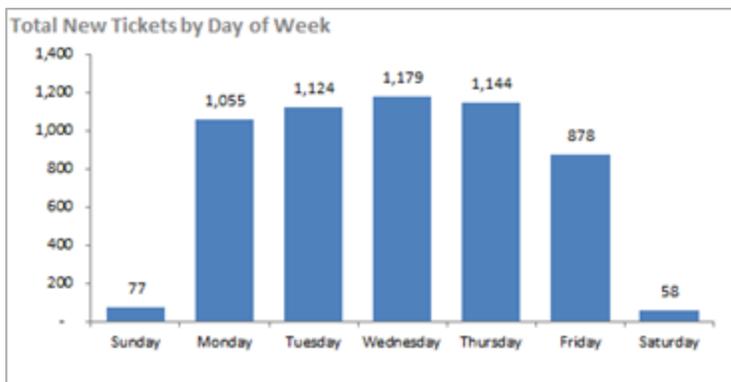

Y Axis = Number of tickets
X Axis = Weeks
Blue = Monday, Red = Tuesday, Green = Wednesday, Purple = Thursday,
Turquoise = Friday

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)
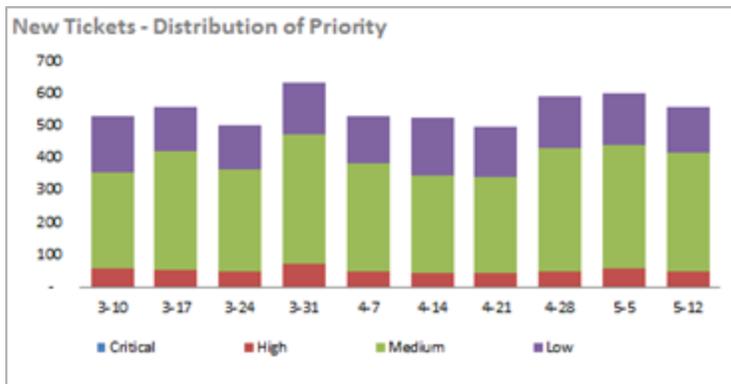

Y Axis = Number of tickets
X Axis = Days of the week
Blue = Total hours

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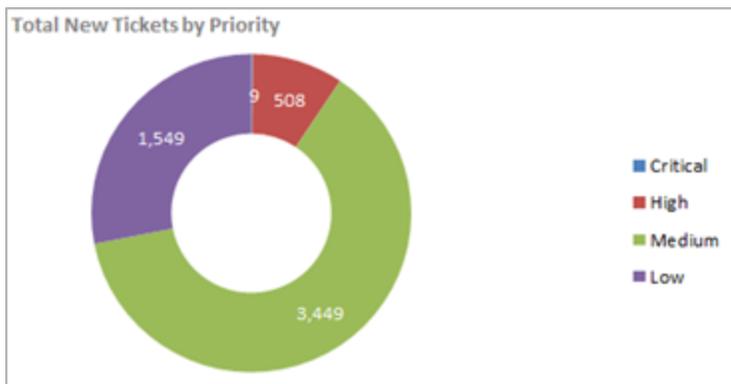
Each sector represents a ticket priority.
The number in the sector = the number of new tickets assigned that Priority.
Blue = Critical, Red = High, Green = Medium, Purple = Low

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
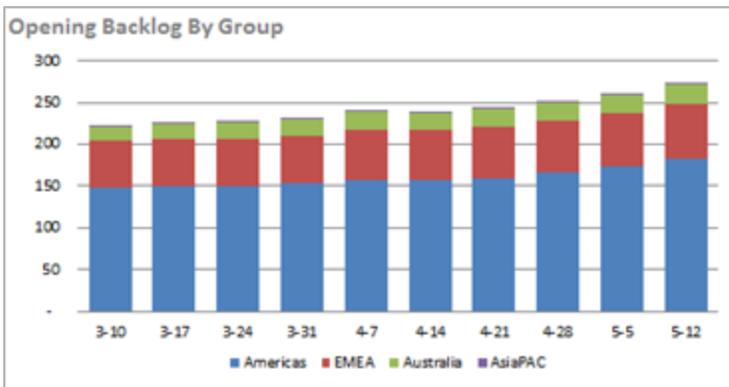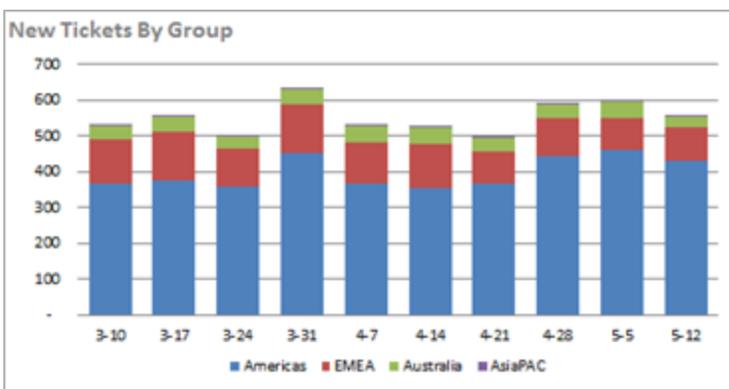

Y Axis = Number of tickets in backlog
X Axis = Weeks
Blue = Americas, Red = EMEA, Green = Australia, Purple = Asi-aPAC

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 = Asi-aPAC

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.

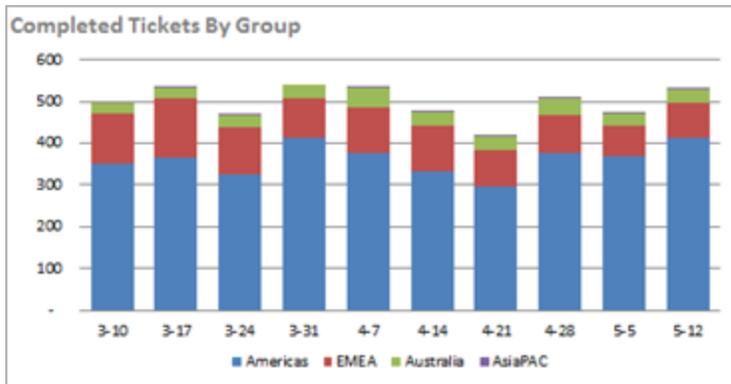## Completed Tickets by Group
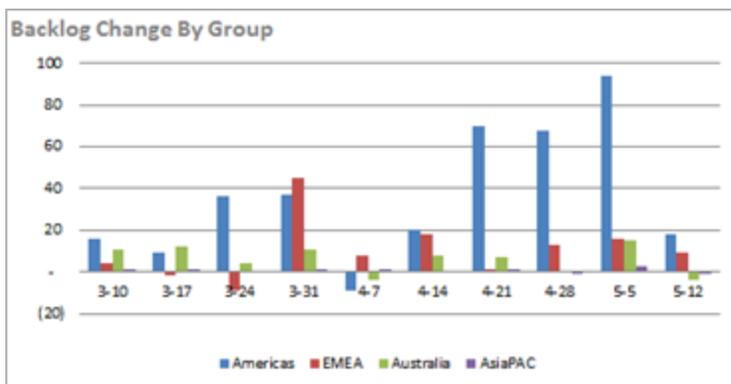

Y Axis = Number of completed tickets
X Axis = Weeks
Blue = Americas, Red = EMEA, Green = Australia, Purple = AsiaPAC

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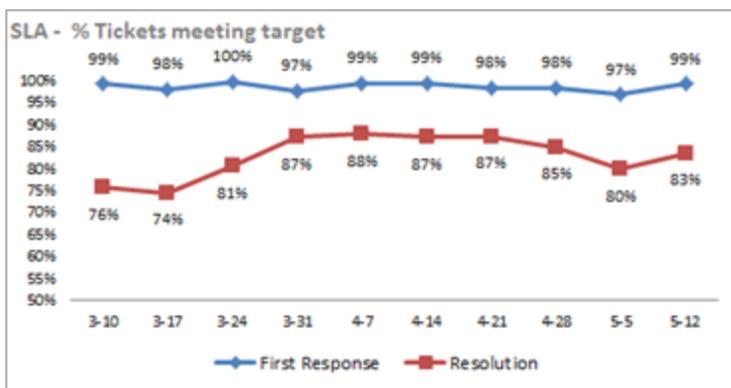
Y Axis = Percent
X Axis = Weeks
Blue = First response, Red = Resolution

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
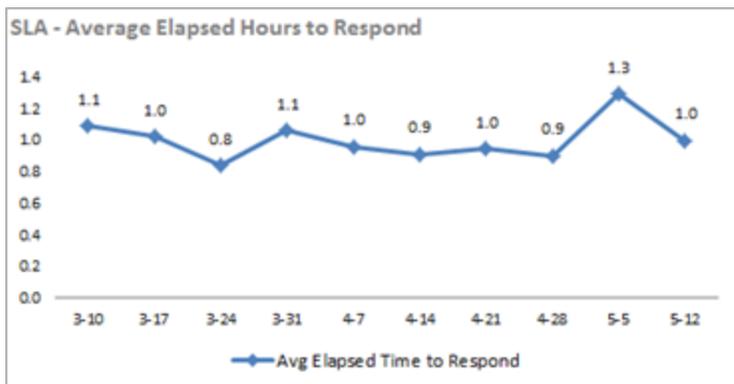
Y Axis = Time in 0.2 hour intervals
X Axis = Weeks
Blue = Average elapsed time to respond

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
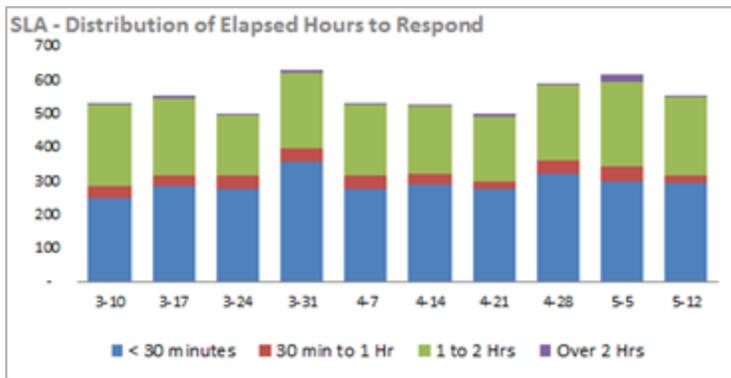
Y Axis = Number of tickets
X Axis = Weeks
Blue = < 30 minutes, Red = 30 minutes to 1 hour, Green = 1 to 2 hours
Purple = Over 2 hours

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
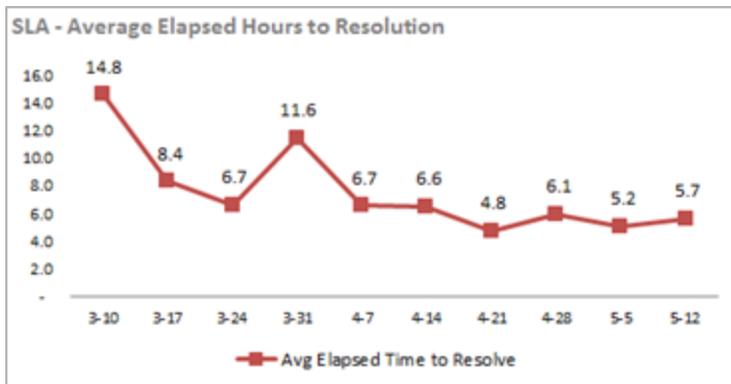

Y Axis = Time in 2 hour intervals
X Axis = Weeks
Red = Averaged elapsed time to resolve

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
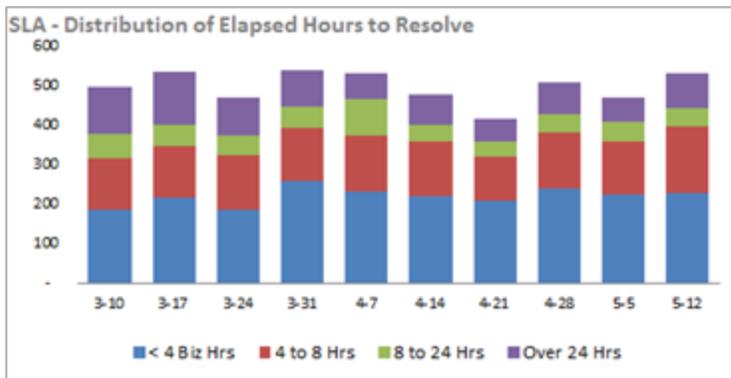
Y Axis = Number of tickets resolved
X Axis = Weeks
Blue = < 4 business hours, Red = 4 to 8 hours, Green = 8 to 24 hours
Purple = Over 24 hours

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 (y 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)
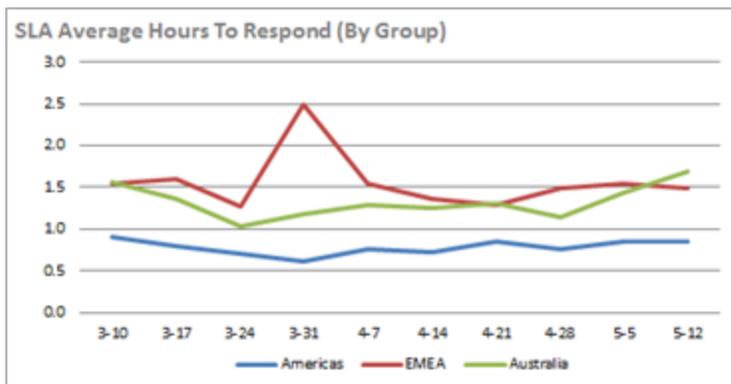
Y Axis = Average response time in 0.5 hour increments
X Axis = Weeks
Customer groups: Blue = Americas, Red = EMEA, Green = Australia

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)

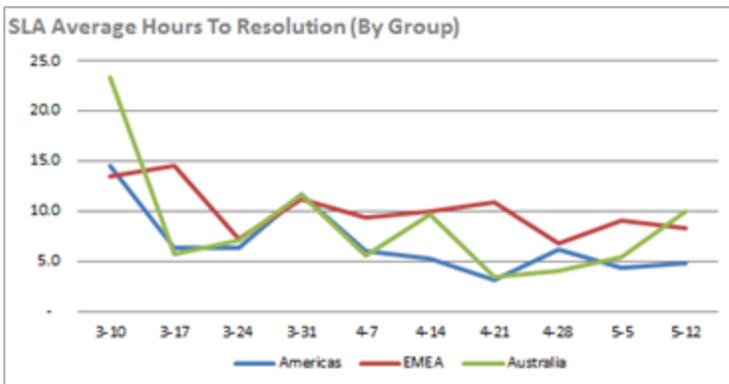Y Axis = Average time to resolve tickets in 5 hour increments
X Axis = Weeks
Customer groups: Blue = Americas, Red = EMEA, Green = Australia

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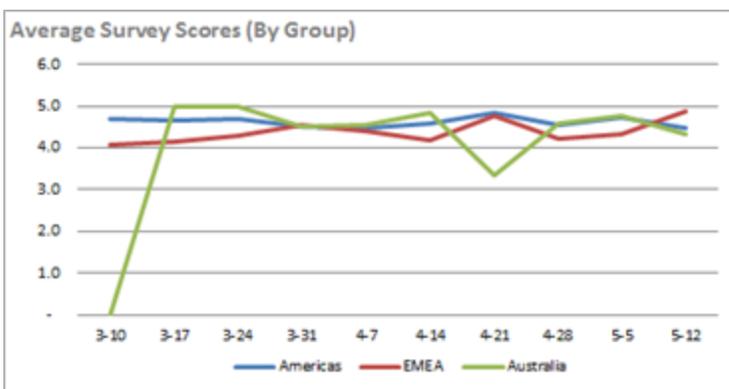
Y Axis = Average survey score
X Axis = Weeks
Customer groups: Blue = Americas, Red = EMEA, Green = Australia

View the average score received on customer surveys (y axis) by week (y 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.
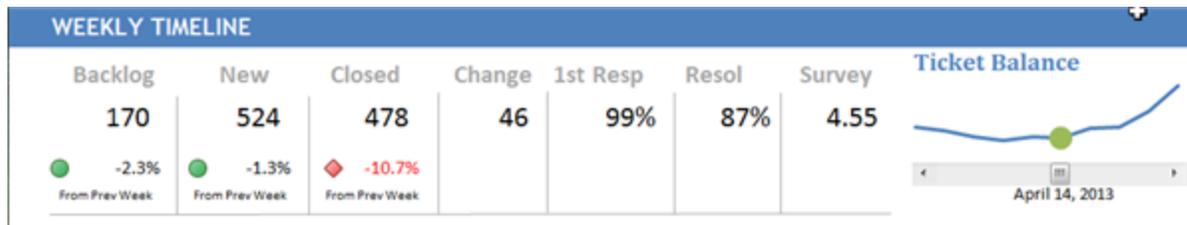
Metrics that Matter

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.
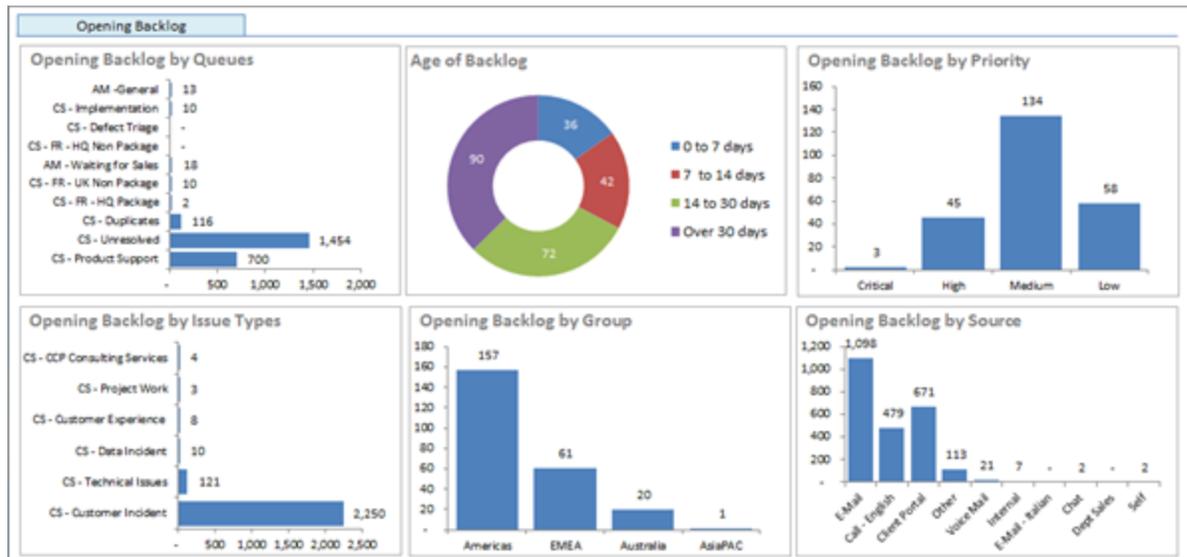
New Tickets

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.
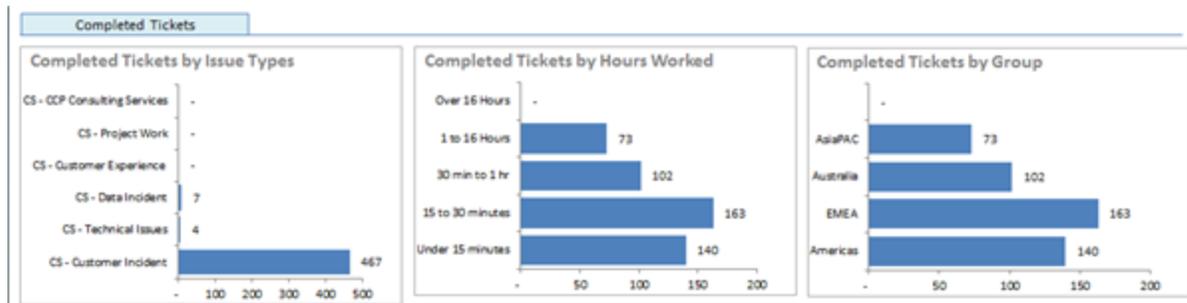
SLA and Survey

Examine and compare your SLA response and resolution results and your survey ratings from different weeks or different days.
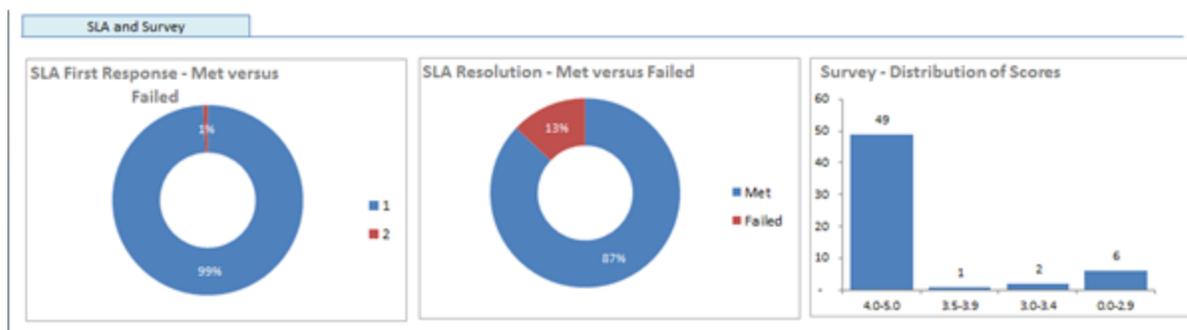
Dashboard: Rolling Four Week Comparison

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 13.
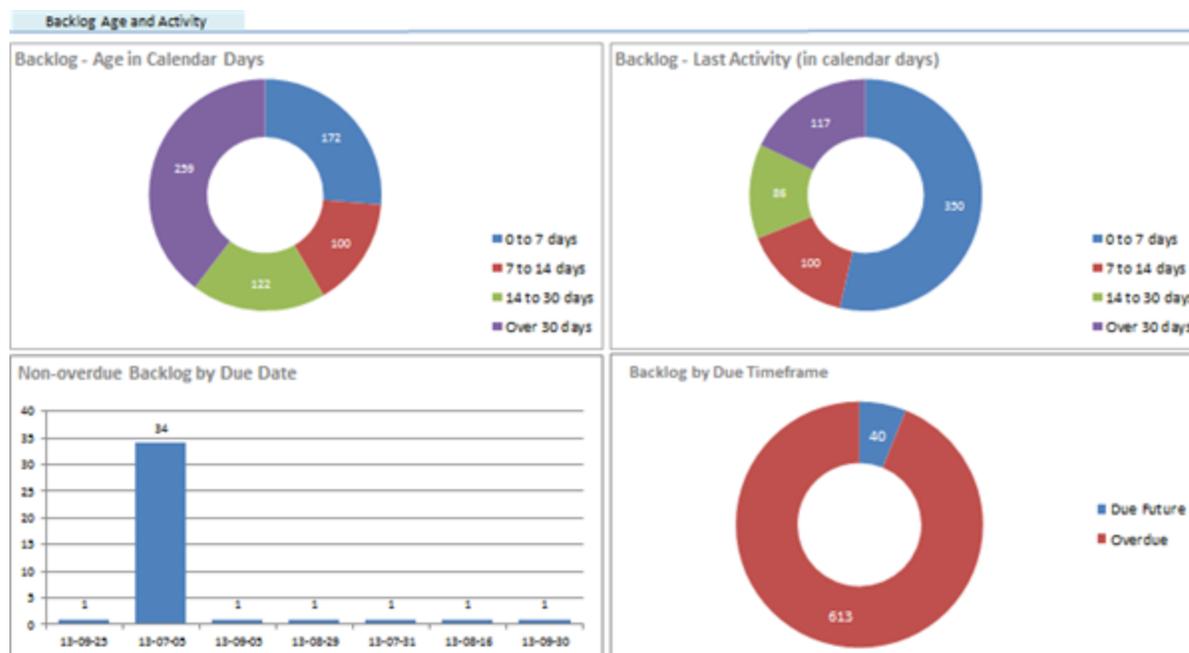
Backlog Age in Calendar Days
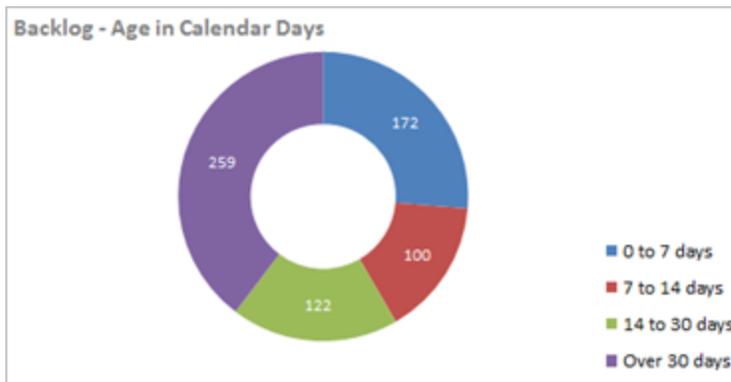
Blue = 0 to 7 days, Red = 7 to 14 days, Green = 14 to 30 days, Purple = Over 30 days

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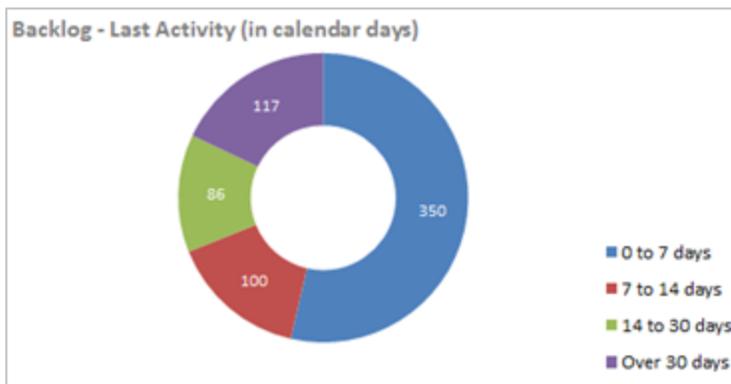
Blue = 0 to 7 days, Red = 7 to 14 days, Green = 14 to 30 days, Purple = Over 30 days

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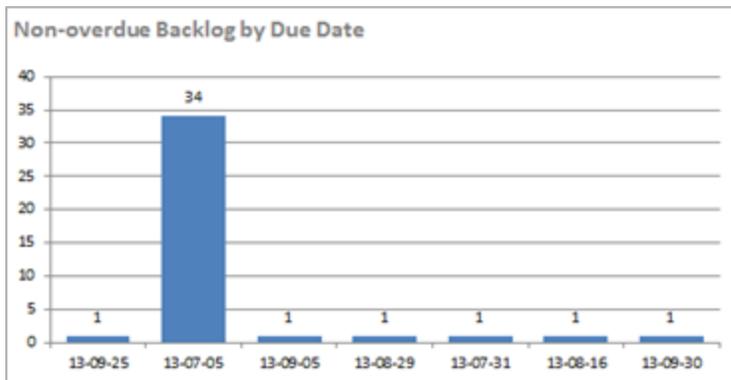
Y Axis = Number of tickets
X Axis = Ticket due date

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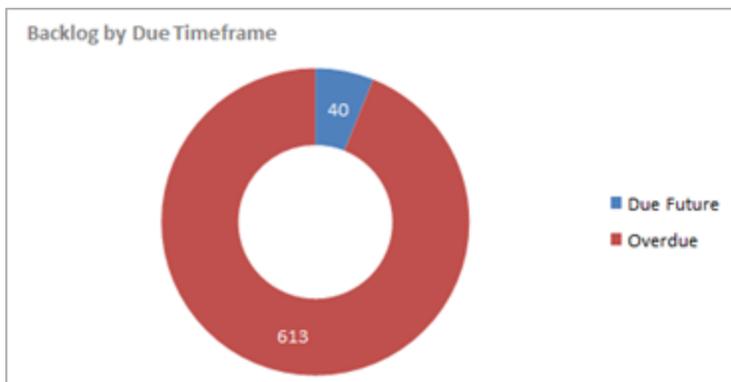
Blue sector = Number of tickets not yet due
Red sector = Number of tickets overdue

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 13.

Backlog Characteristics

Backlog by Selected Priority

- Critical
- High - ESCALATED
- Medium - ESCALATED
- Low - ESCALATED

Backlog by Selected Issue Type

Backlog by Selected Sub-issue Types

Backlog by Ticket Source

Backlog by Selected Queues

Backlog by Top 5 Clients

Backlog by Top 5 Resources

Backlog by Group

Backlog - First Responses

- Backlog First Response Met
- Backlog First Response Fail
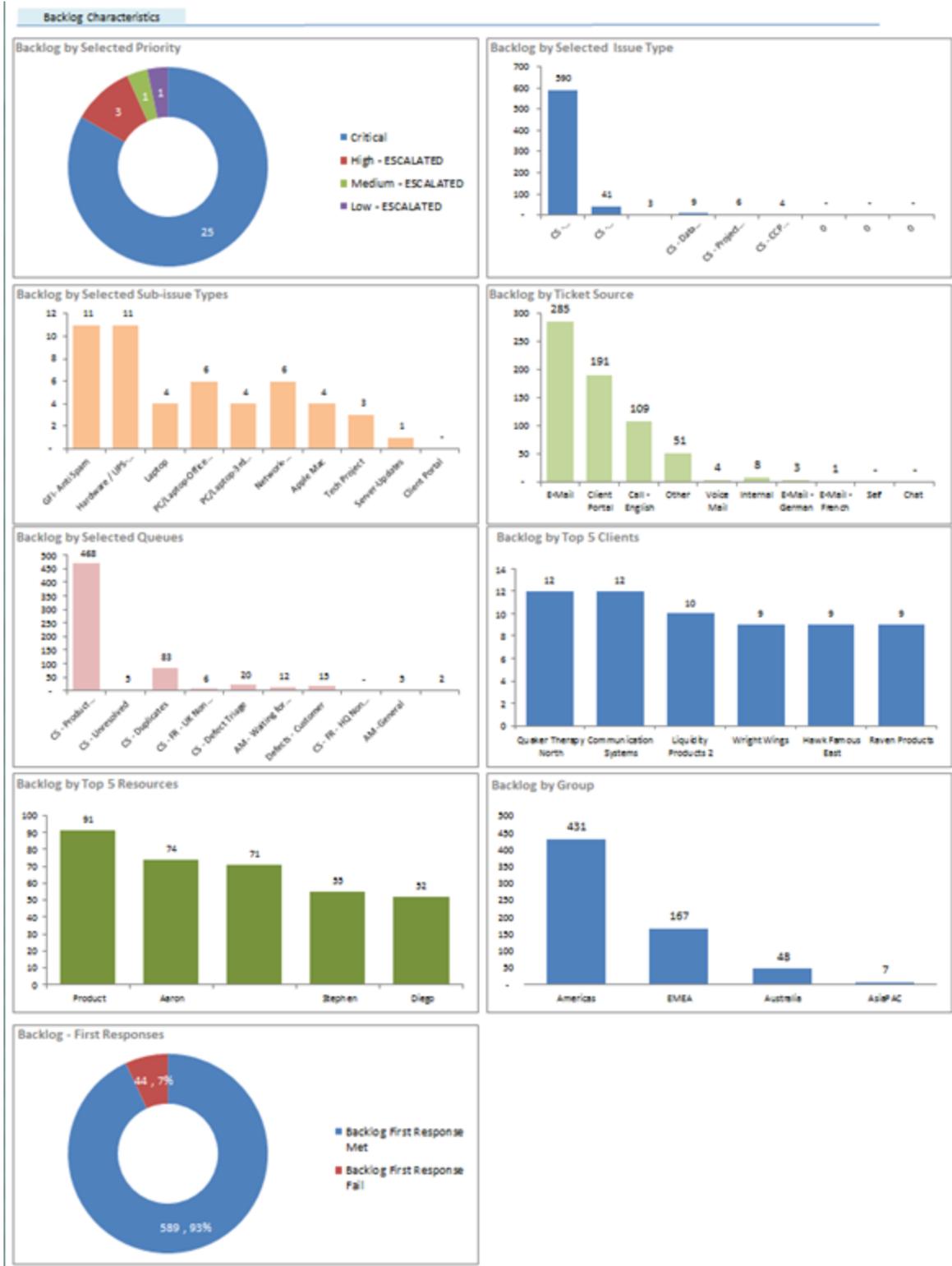
Backlog by Selected Priority
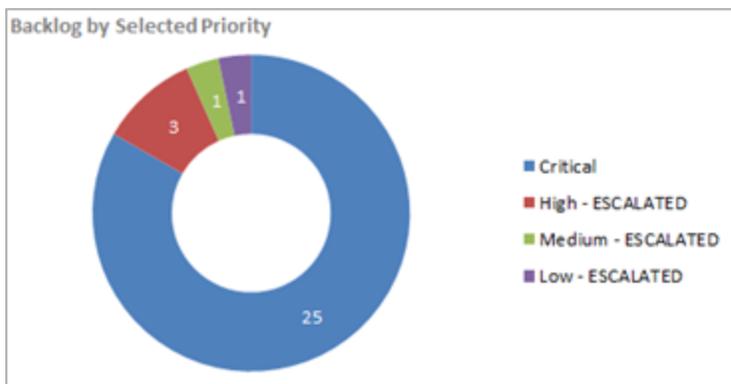
Blue = Critical, Red = High - ESCALATED, Green = Medium-ESCALATED, Purple = Low

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)
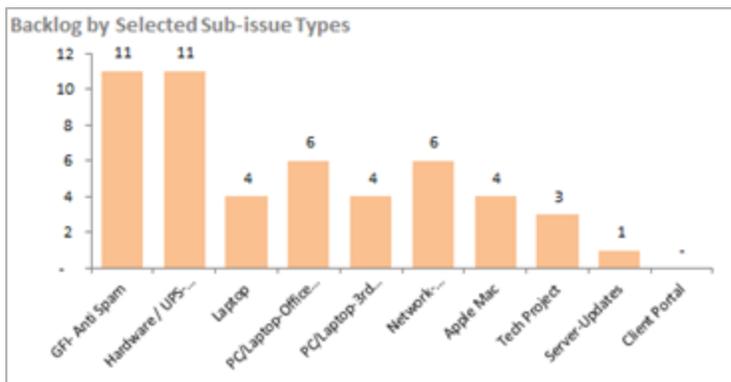
On the Backlog worksheet, the four charts that display the backlog by selected ticket characteristic each use the design format described here. This image represents only one chart as an example.
The x and y axis descriptions apply to each of the four selected characteristic charts.

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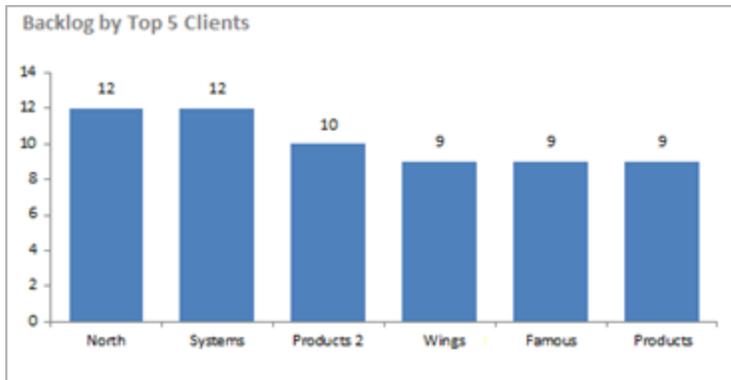
Y Axis = Number of tickets
X Axis = The 5 clients, or 5 resources, that are associated with the highest number of backlog tickets.

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.
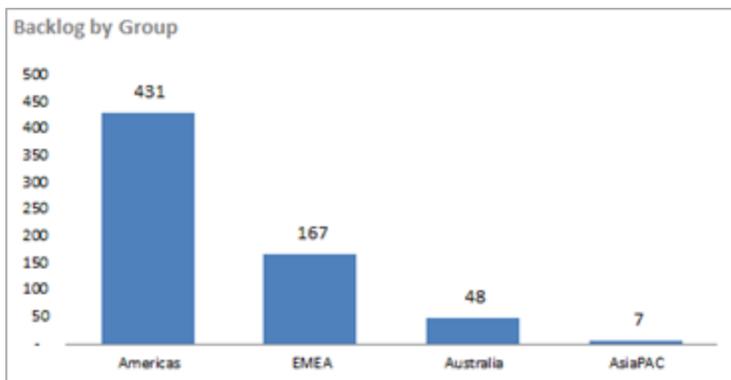
Y Axis = Number of tickets
X Axis = The main ticket groups.

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 12.

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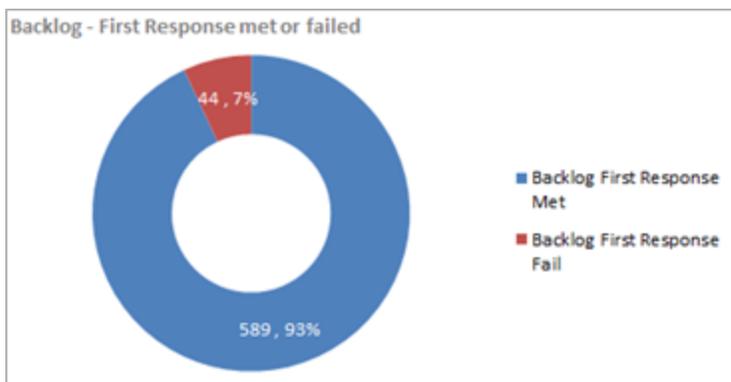
Blue = Backlog First Response Met
Red = Backlog First Response Failed

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.

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
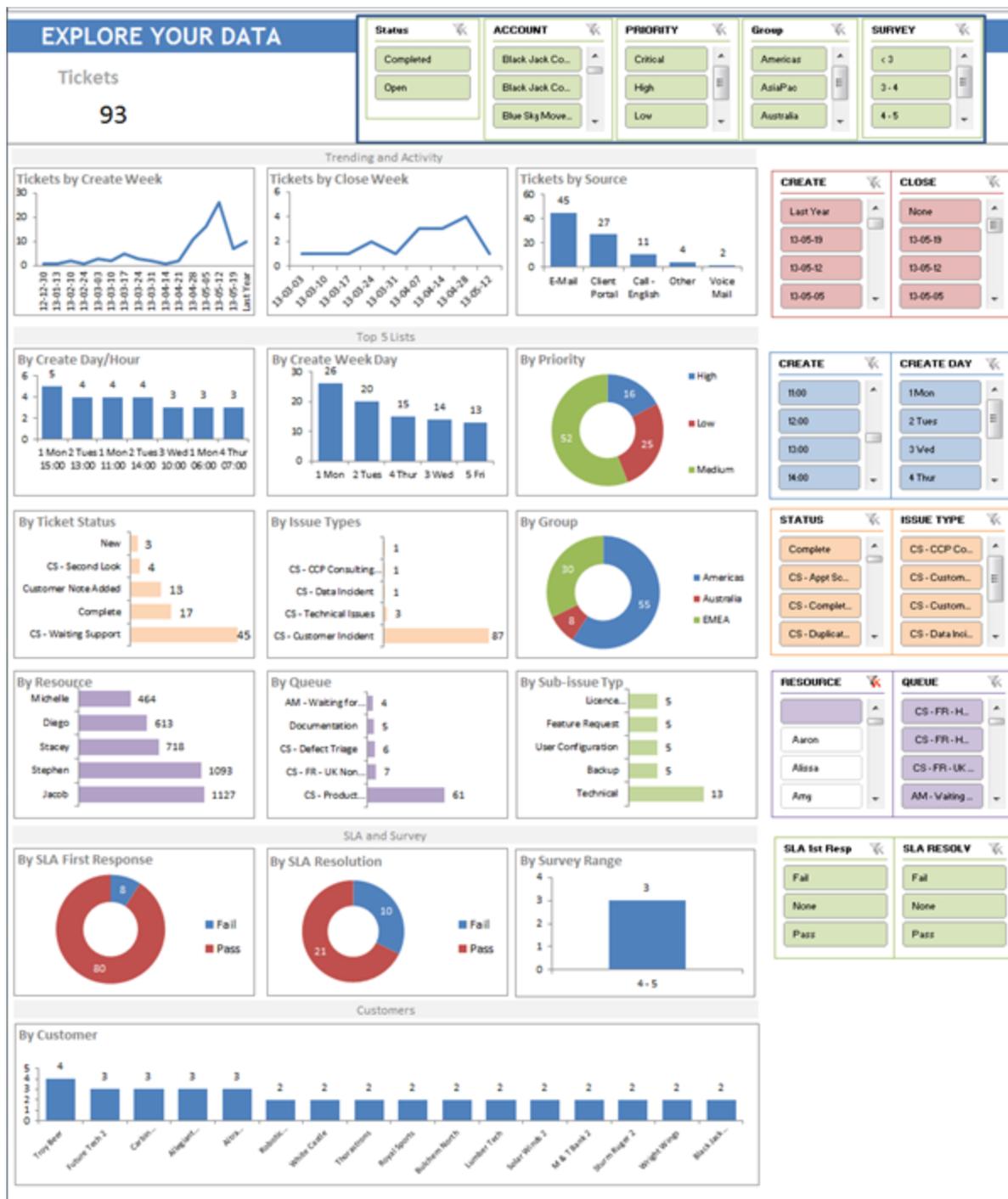
Daily Analysis Explore Image
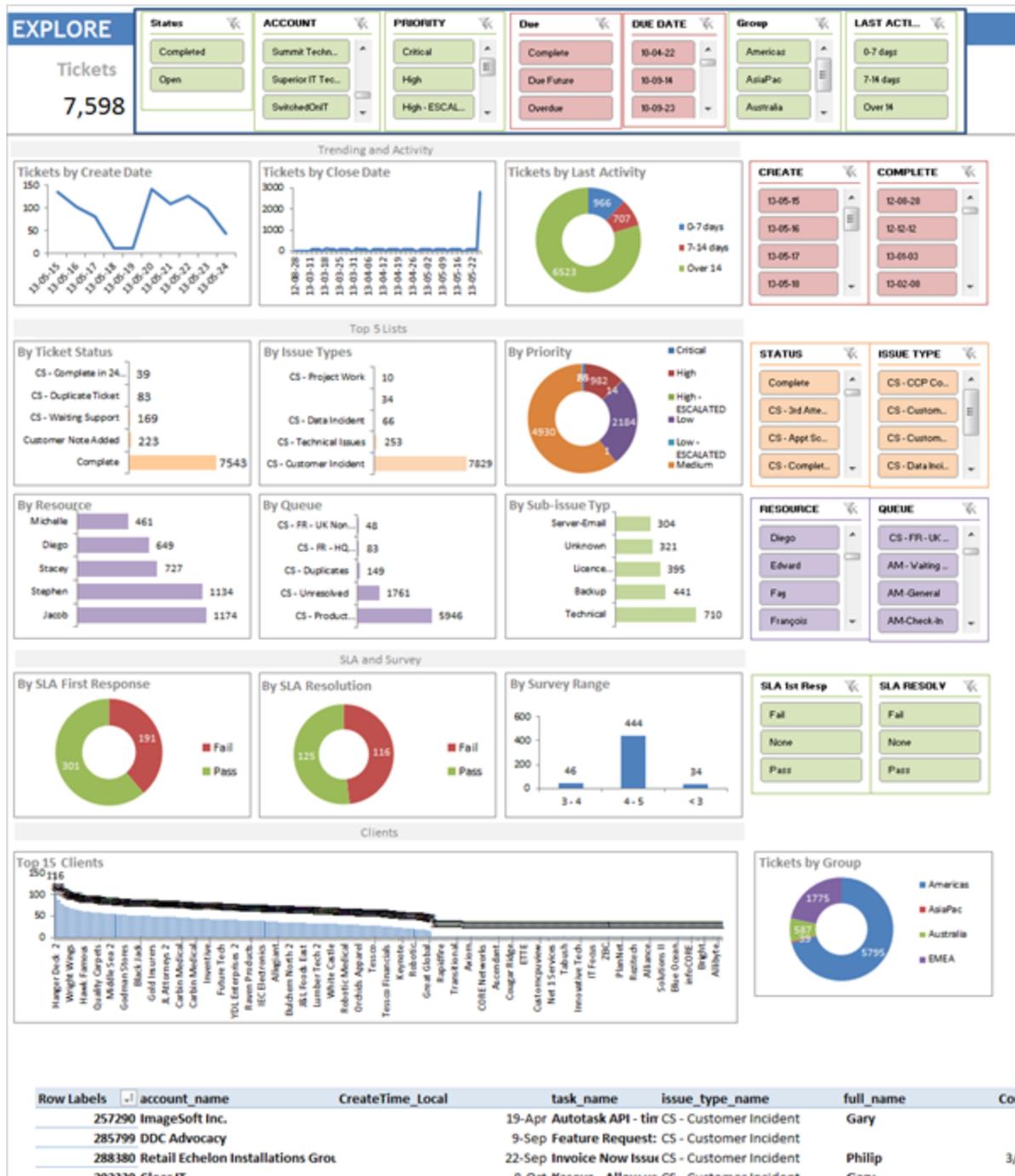
Ticket Detail List

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.

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 55.

Using the Client Workbooks

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

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

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

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

Easy to Produce Reports

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

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

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

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

Refer to "Setting Up and Running a Client Report" on page 64.

Your Top Clients

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

Cover Page and Table of Contents (TOC)

The Cover Page tab displays the report cover page. The cover displays the company name that you enter in step 2 on the Config tab. To add a name, click the Config tab and follow the instructions. The "Prepared for: " name is inserted when the report is generated. Refer to "Setting Up and Running a Client Report" on page 64.

The TOC tab lists the seven sections of the report. When you run the report, you can choose which sections to include. Refer to "Setting Up and Running a Client Report" on page 64.

Include Up to Seven Types of Service Data

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

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

New Tickets

This tab includes 17 graphs that provide your clients with a data on the new tickets you are creating for them. Refer to "New Tickets Report" on page 68.

Completed Tickets

The 5 graphs on this tab show your client how many tickets were completed during the specified time period and they provide details like hours worked and which of the client's resources initiated the tickets. Refer to "Completed Tickets" on page 73.

SLA First Response and SLA Resolution

These two worksheets each display 5 graphs that show your client how well you're meeting your SLA first response and resolution targets. Refer to "SLA First Response and SLA Resolution" on page 75.

Surveys

Is your client participating in your client surveys? If so, you can show them how well you're doing. Refer to "Survey Results" on page 78.

Contacts

This worksheet displays 3 graphs that show the client's employee participation in ticket creation. Refer to" Client Contact Participation" on page 80.

Configuration Items

Do you track configuration items for some or all of your clients? If so, you can include a section in your report that provides details on tickets associated with different configuration item types. Refer to "Configuration Items" on page 82.

Edit the Graph Summary Explanations

If you want to change the content of the summary explanations that appear under your graphs, you can do that on the Graphs Explanation page. Refer to "Setting Up and Running a Client Report" on page 64.

Setting Up and Running a Client Report

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

Before you generate reports:

- New users should make sure that the **Config tab** for the Client workbook has been configured. You can follow the instructions on the Config tab, or refer to "Get Started with Performance Analytics" on page 6.

- Make sure your workbook data has been refreshed. If not, click **Refresh Data** on the Home page. A network connection is required.

> When you refresh data, if the password was not saved with the workbook, the process will ask for the password twice. This is normal. Please provide the password both times to make sure all data is refreshed properly.
>
> For details on saving the password, see Step 4 on the Config tab.

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

  If you use a different output folder, you must update the Output Folder field in the Create Client Service Report PDF window when you run your reports. Refer to "Generate the Final PDF File" on page 65.

Set Up the Report

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

Select the Account

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

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

Selected Tickets

Number of Tickets

4

Worked Hours

3.75

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

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

Set Up the Filters

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

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

To use the filters:

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

- Click to select an option in the filter list.

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

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

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

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

Review the Graphs and Decide Which Tabs to Include

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

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

Generate the Final PDF File

When you have everything set -

1. Click Create Client Report.

   The Create Client Service Report PDF form opens.

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

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

Task	Description
Create Report or Close	Click Create Report to generate one or more reports. You will find the finished PDF reports in the directory folder specified. When you are done with this window, click Close

3.   Review your final report.

4.   Attach the PDF file to an email, or print it.

Changing the Graph Summary Explanations

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

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

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

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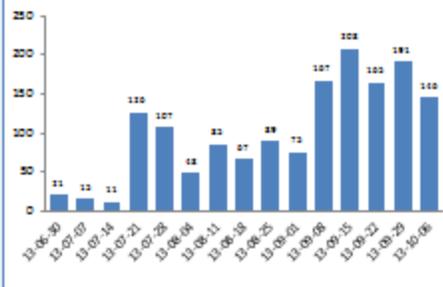
New Tickets Report

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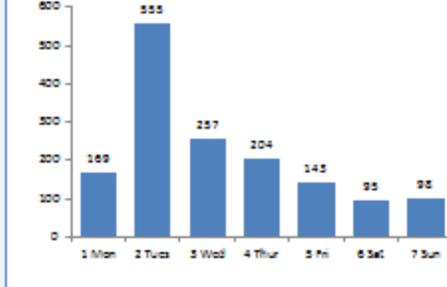
When were your tickets created?

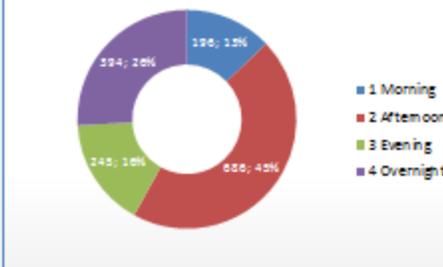**When were your tickets created?**

NEW TICKETS BY CREATE WEEK

It's important know how your tickets are trending and why.
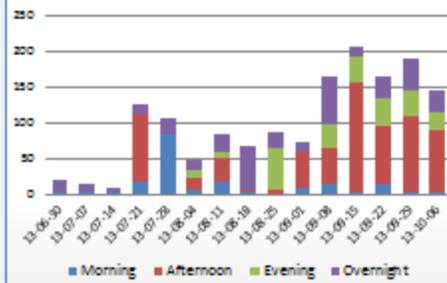
NEW TICKETS BY CREATE DAY

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

TICKETS BY CREATE TIME OF DAY

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

DISTRIBUTION BY CREATE TIME OF DAY

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

TICKETS BY MOST ACTIVE CREATE DAY/TIME
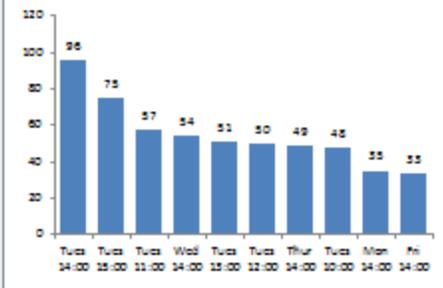
What hours during the week do you submit the most tickets? Demo IT Service Company is busiest on Tues 14:00.

TICKETS BY CREATE DAY/TIME OF DAY

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

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

- How many tickets did they submit in the previous weeks; was the amount steady, or were there spikes and dips?

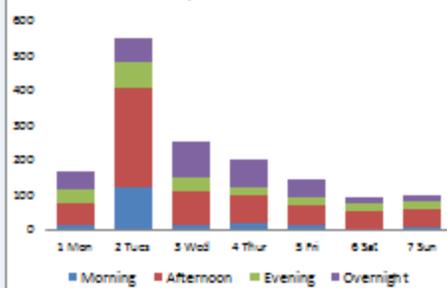- How many tickets did they submit during different times of day, including in the evening and over night?

- What was their ticket creation count by day of the week?

- What was their ticket creation count by creation time for the days of the week?

- What is the distribution of ticket creation at different times of day over a period of weeks?

- What days and times do they create the most tickets?

- How many tickets did they create during different time periods for each day of the week.

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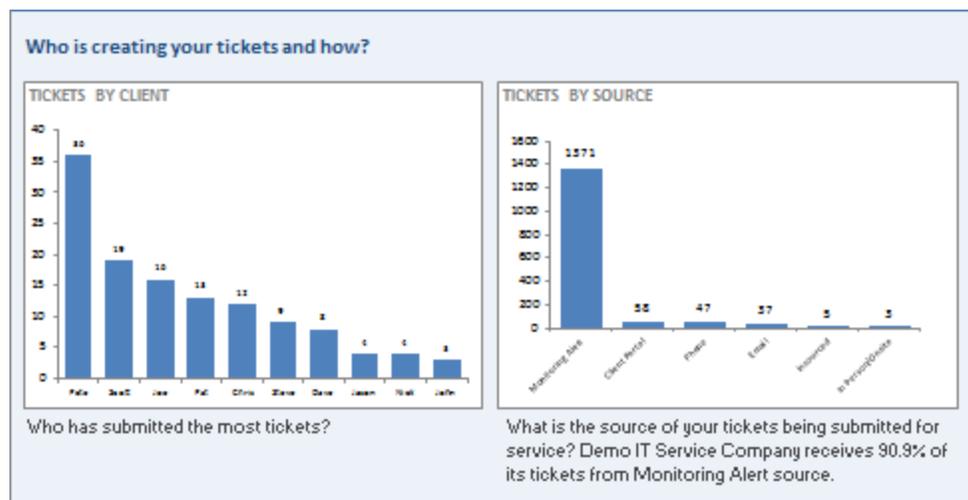
Here your clients can learn which members of their team submitted tickets, and who submitted the highest count. They can also learn how their company is submitting tickets.

What types of tickets are being created?

What type of tickets are being created?

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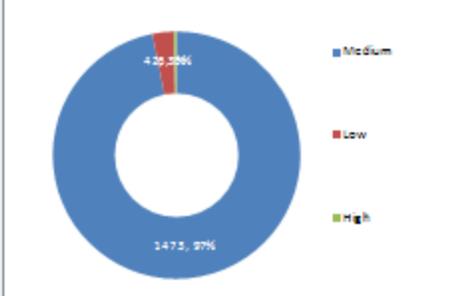
What is the priority of your tickets? Demo IT Service Company receives over 97.% of it's tickets with a status of Medium.

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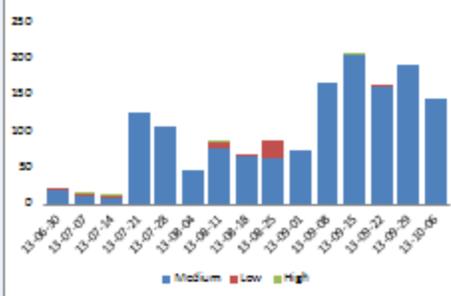
Were there weeks which had a spike in higher priority tickets? Has the priority of tickets been stable over time?

TICKETS BY TOP 5 QUEUES
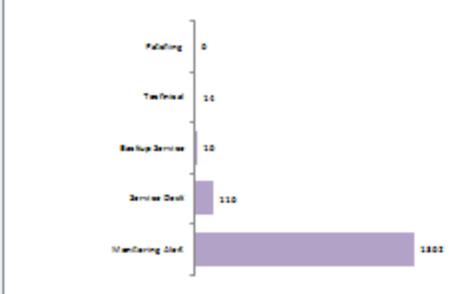
We assign tickets to queues to ensure that are efficiently processed. Based on the assigned queue, the appropriate resources are assigned to address the issue.

TICKET QUEUES BY CREATE TIME OF DAY
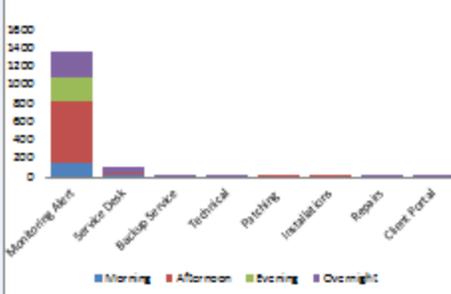
What time of day were tickets created for certain queues? Most of the evening and overnight tickets typically associated with monitoring or maintenance activities.

What type of tickets are being created? (continued)

TICKETS BY TOP 5 ISSUE TYPES

What issue types had the most tickets? The top issue type for Demo IT Service Company is Monitoring Alerts at 90.9%.

TICKETS BY TOP 5 SUB-ISSUE TYPES

What are the major sub-issue types for your tickets? What are the major sub-issue types for your tickets? Demo IT Service Company receives 93.9% of its tickets from Monitoring Alerts.

TICKETS BY TICKET STATUS

What are the statuses for your tickets?

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

- What are the priorities of their new tickets? Do they have a lot of High or Critical priority tickets?

- Do the priorities remain the same over time, or were there periods where there was an increase or decrease in certain priorities?

- In which queues are the new tickets? This is especially useful if your company uses descriptive queue names.

- Are more tickets created for certain queues at certain times of the day?

- What are the top 5 issues and sub-issues for which the new tickets were created?

- What is the current status of the new tickets? This helps the client see what progress is being made on all those new tickets.

Who has been working on your service tickets?

Who has been working on your service tickets?

TICKETS BY TOP 5 TECHNICIANS

TICKETS BY GROUP

Who has been working on most of your tickets at Demo IT Service Company?

What groups do your tickets belong to?
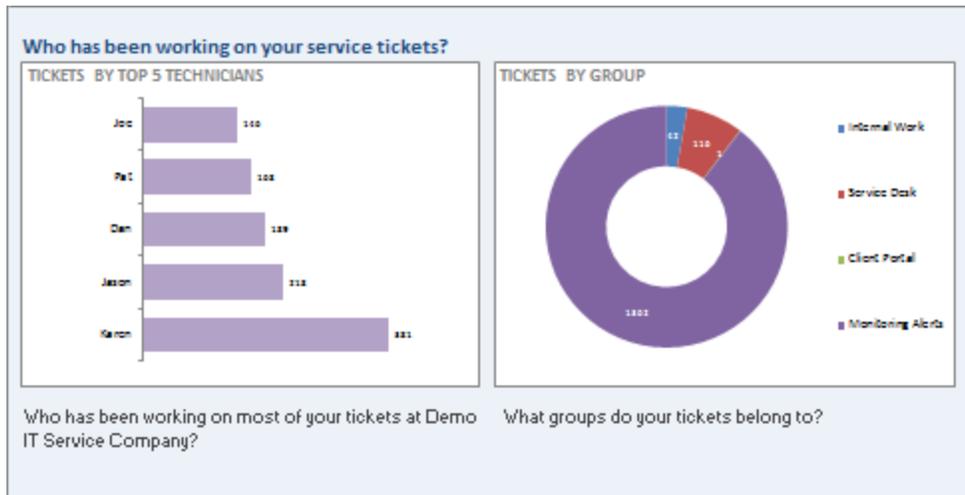
Your clients can learn the following information from these charts:

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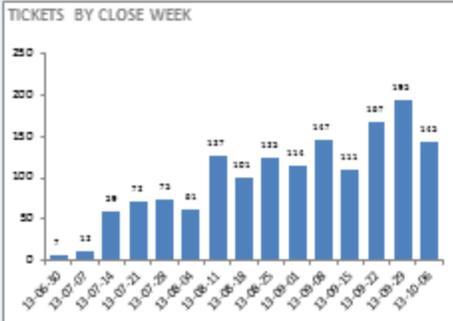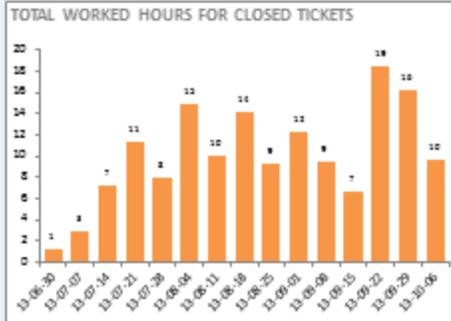
- The groups, or teams, that are responsible for their new tickets, and how many tickets are assigned to each group.

Completed Tickets

When were your tickets completed and what was the effort?

TICKETS BY CLOSE WEEK

The completion of tickets often mirror the creation of new tickets.

TOTAL WORKED HOURS FOR CLOSED TICKETS

How are we meeting our SLA resolution targets for each priority for your tickets? Additionally, Demo IT Service Company has spent 1.4 hours working on your tickets that are still open.

DISTRIBUTION OF TOTAL HOURS WORKED

- Over 1 hour
- 30 to 60 min
- 15 to 30 min
- 0 to 15 min
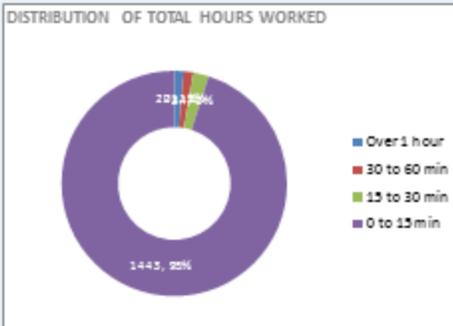
How much effort does it take to resolve most of your tickets? Demo IT Service Company resolves 94.4% of tickets in 0 to 15 min.

TICKET DISTRIBUTION BY HOURS WORKED

Over 1 hour ■ 30 to 60 min ■ 15 to 30 min ■ 0 to 15 min
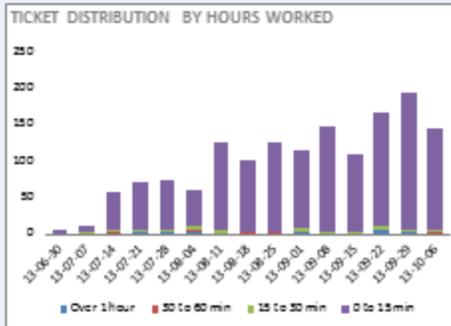
What is the trend of the percentage of tickets taking longer than an hour of work to resolve?

HOURS WORKED BY CLIENT
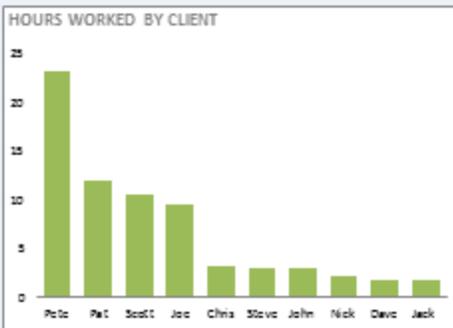
How much effort was spent on tickets for different people at your company?

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

- How many tickets were closed in each week covered by the report?

- How many hours were worked on closed tickets during those weeks?

- Of the total number of hours worked, how many tickets were closed in less than 15 minutes, between 15 and 30 minutes, between 30 minutes and one hour, and how many tickets took more than one hour to close?

- How many hours were worked per ticket each week?

- How many hours were worked on tickets submitted by different people at the client's company?

SLA First Response and SLA Resolution

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

What service levels are being delivered for First Response?
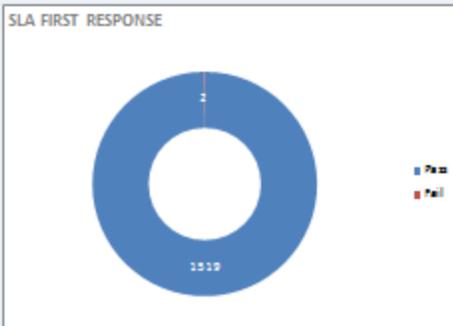
SLA FIRST RESPONSE

How are we meeting our SLA first response targets for your tickets?
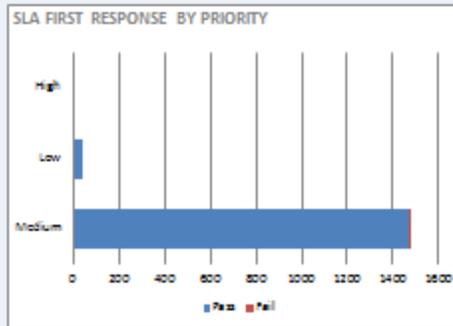
SLA FIRST RESPONSE BY PRIORITY

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

AVERAGE SLA HOURS TO RESPOND
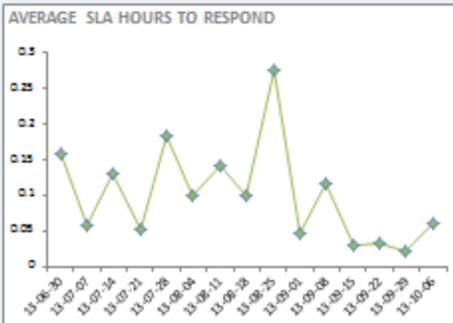
What is the trend of average SLA hours (typically business hours) to respond to new tickets?

DISTRIBUTION OF SLA RESPONSE HOURS
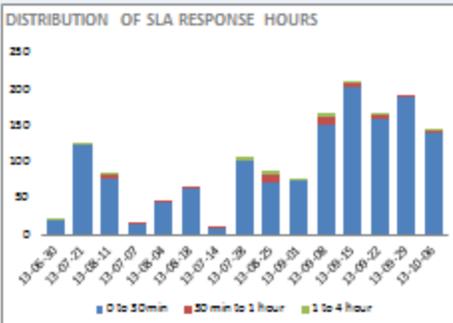
Sometimes a couple of slow responses can skew the average. Here we see the distribution of tickets across SLA first response ranges

SLA FIRST RESPONSE BY CLIENT EMPLOYEE
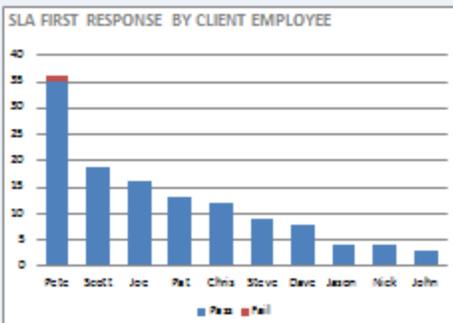
Have certain of your employees not received a fast first response?

What service levels are being delivered for Resolution?
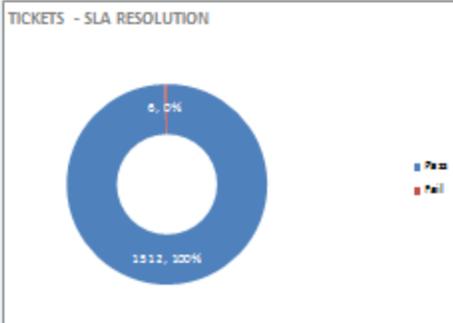
TICKETS - SLA RESOLUTION

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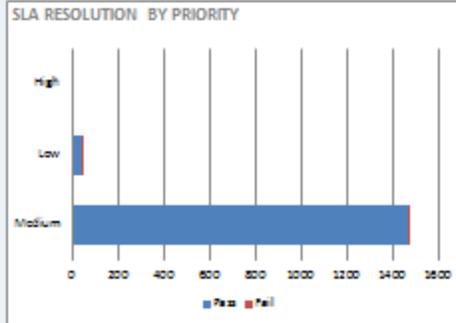
SLA RESOLUTION BY PRIORITY

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

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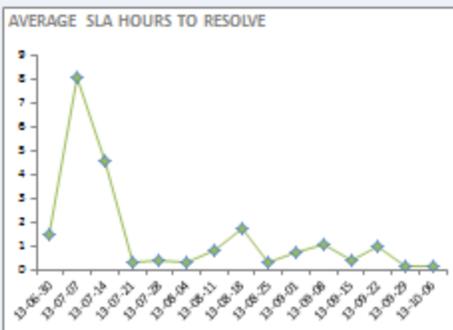
What is the trend of average SLA hours (typically business hours) to resolve tickets?

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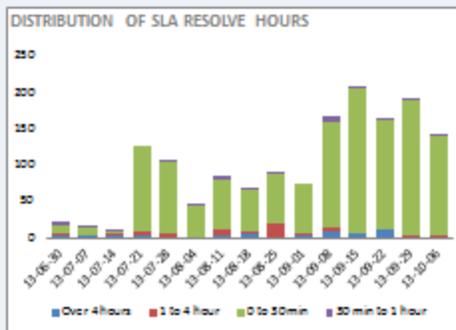
Sometimes a couple of slow resolutions can skew the average. Here we see the distribution of tickets across SLA resolution ranges.

SLA RESOLUTION BY CLIENT EMPLOYEE

Have certain client employess not received a quick enough resolution?

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

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

- The number of tickets in each week that met target within 30 minutes, between 30 minutes and 1 hour, and between 1 and 4 hours, and how many tickets required over 4 hour to meet target.

- The number of tickets submitted by each client team member that met their first response or resolution targets.

Survey Results

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

What has been the client feedback via surveys?

TICKETS – SURVEY SCORES

What are the range of survey scores submitted?

SURVEY SCORES BY CLIENT

How did different client employees score their service?

SURVEY SCORES BY ISSUE TYPE

How was the service for specific issue types?

SURVEY SCORES BY TECHNICIAN

Which techs get the best survey scores?

SURVEY SCORES BY QUEUE

How did different queues get survey scored?

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

- How each client team member rated their experience with your company

- How well your company was rated for handling specific issues

- How well your employees were rated by the client team members

- How tickets work was rated for tickets from different queues

Client Contact Participation

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

How did the ticket performance vary for your employees?

TICKETS BY PRIORITY (GROUPED BY CLIENT EMPLOYEE)
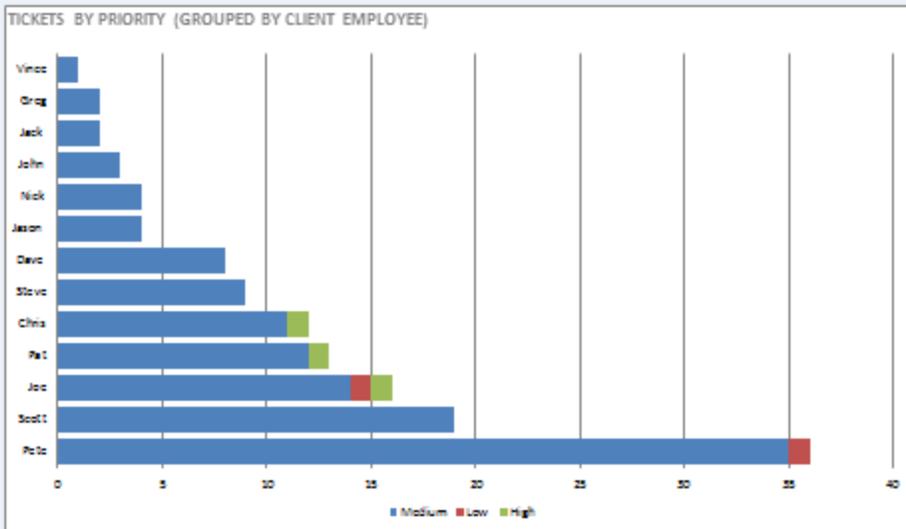
How have the ticket priorities varied by your employees? Do some employees have more high priority tickets than others?

TICKETS BY SOURCE (GROUPED BY CLIENT EMPLOYEE)
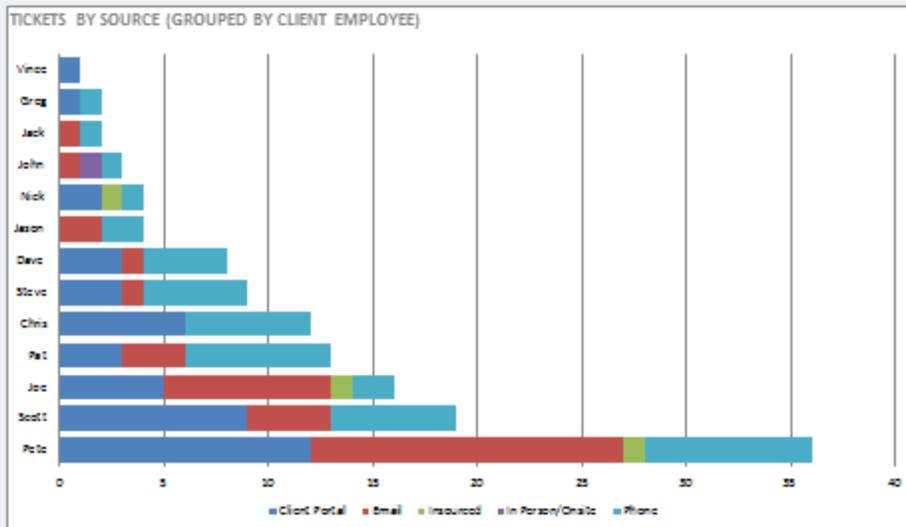
How does the source of tickets vary by your employees? Are employees using the preferred method for ticket submission?

How did the ticket performance vary for your employees?

TICKETS BY ISSUE TYPE (GROUPED BY CLIENT EMPLOYEE)

What types of tickets are being submitted by your employees?
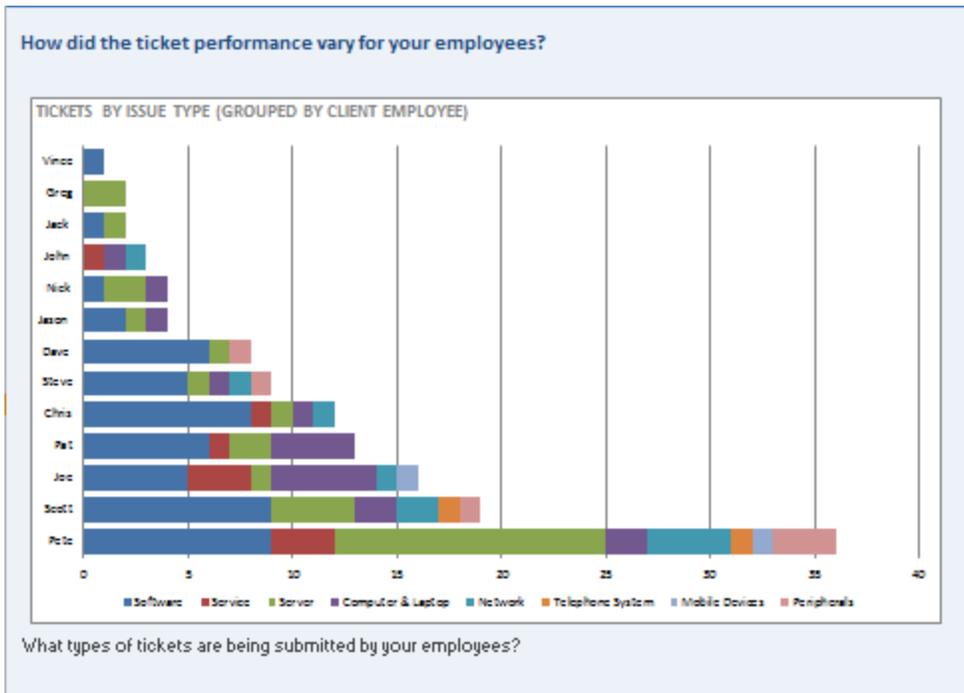
Not only can clients see which of their employees are submitting tickets and how many, they can also learn:

- What priority tickets the different employees are submitting

- What method employees use to submit their tickets

- The different issue types for which employees submit tickets

Configuration Items

Do you track configuration items for some or all of your clients? If so, you can include a section in your report that provides details on tickets associated with different configuration item types.
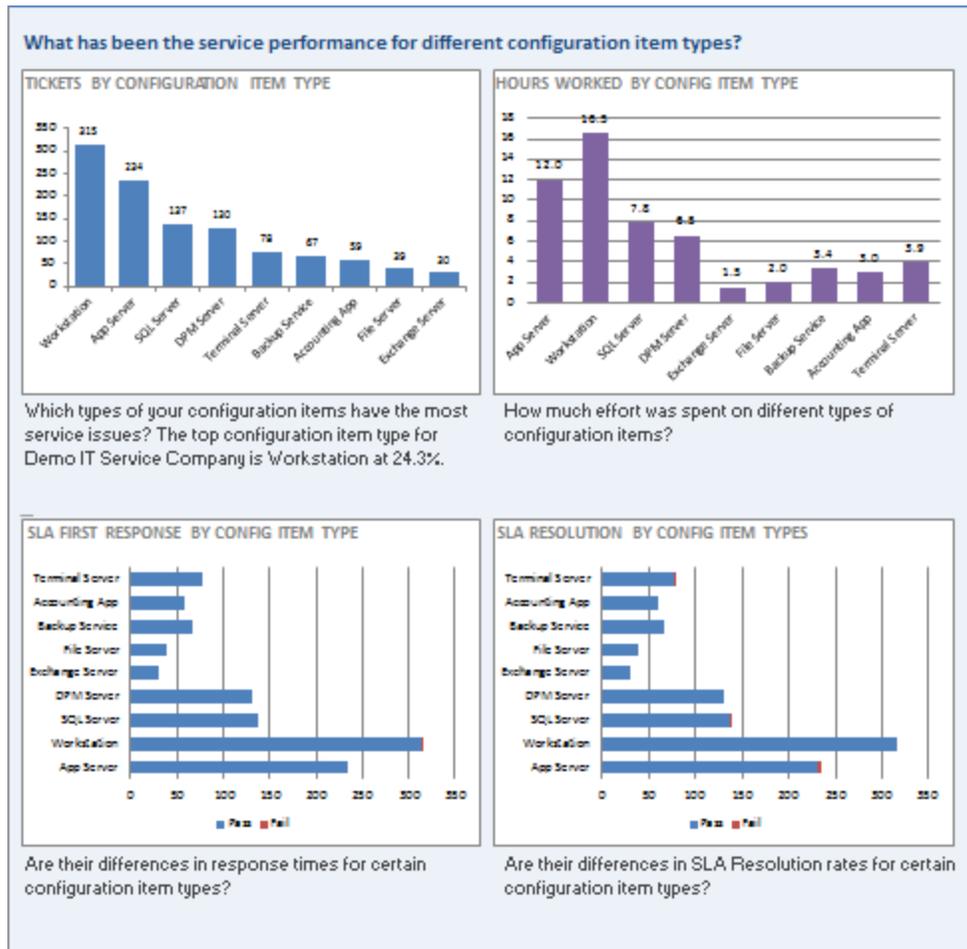
The first graph on the page simply shows the count of tickets created for configuration item types. The three additional graphs show your client the following details:

- The number of ticket hours worked for the different configuration item types.

- Whether you met your SLA first response target for the configuration item types.

- Whether you met your SLA resolution target for the configuration item types.

Using the Sales Workbook

Whether you have a dedicated sales team pursuing projects worth tens of thousands of dollars, or just one person who follows up on leads, responds to RFPs, and handles calls from potential customers, the Autotask Performance Analytics Sales workbook can help you take your sales to the next level. You can look at your past and current sales trends, analyze what worked and what didn't, and then look at your sales forecasts and apply your new insights:

- Monitor the big picture: total year to date revenue, current fiscal year comparison to previous fiscal year, revenue growth, and projected revenue.

- Drill down for more detail: actual revenue compared to your business plan, actual revenue compared to forecast revenue, revenue by sales team and by revenue type.

- Explore even deeper to pinpoint key factors associated with the sales results: time of year, revenue source, sales team or even individual resources.

In the Sales Workbook, easy to follow charts present key data about your sales opportunities from the earliest stage to the close. The Fiscal Year worksheet displays, in table form, all data that appears in the charts. You can use the charts to view and compare data and analyze factors that impact your revenue. Then you can use the information to plan sales strategies, focus your resources where needed, motivate your sales people, set goals, and measure your success in meeting those goals.

Metrics that Matter

Ten key metrics are located at the top of the current Fiscal Year worksheet, under the heading Metrics that Matter. Several of these key metrics also appear at the top of each of the six worksheets that display revenue charts

These metrics provide a quick view of the revenue generated by the sales opportunities that you manage in Autotask. The opportunities and revenue they generate are divided into two categories:

- **One time** revenue is received from a product or service provided once, for example, the sale and installation of hardware, or maintenance or repair work not covered by a service plan.
- **Monthly recurring** revenue is received continually in a set quantity every month to provide ongoing labor or services, for example, routine network monitoring and maintenance, or software licensing and upgrade management.

For additional information on the Metrics that Matter, refer to "Sales Plan and Analysis - Current and Previous Fiscal Year " on page 119.

Year to Date Sales Trends

Use the 20+ charts on this worksheet to analyze your year to date revenue trends. Gain insight on where your revenue is growing and where it is stagnating. When you specify revenue goals on the Fiscal Year worksheet, you can display those goals on selected charts on the Trends worksheet to quickly compare actual revenue to goals.

Refer to "Year to Date Sales Trends" on page 86.

Year Over Year Sales Trends (version 1.2)

Use this worksheet to compare your revenue and cost trends with data from the previous year. You can look at monthly and one-time revenue, total revenue, and total cost on a month to month and quarterly basis for the current and previous fiscal year. Monthly and one-time revenue is presented by month, average revenue per opportunity, and average amount of time to close an opportunity in a given month.

Refer to "Trending - Year Over Year (version 1.2)" on page 94.

Closed Last Month and Closed This Month

Use these two worksheets, Closed This Month and Closed Last Month, to follow sales by group. The default groups are sales teams. You can also view the sales results of the top five sales representatives. These two worksheets include the same charts but the data is specific to the time frame indicated by the worksheet names, "This Month" (opportunities closed to date in the current month) and "Last Month" (opportunities closed during the previous month).

Refer to "Opportunities Closed Last Month and Closed This Month" on page 101.

For information on modifying groups, refer to **"Take Your Workbook to the Next Level" on page 12**.

Forecast this Month

Use this worksheet to see the potential revenue from opportunities expected to close in the current calendar month. Four monthly recurring revenue charts and four one-time revenue charts display data by expected close date, team, top five sales representatives, and stage.

Refer to "Revenue Forecast for the Current Calendar Month" on page 109.

Explore Closed Opportunities

Use this worksheet to drill into revenue data from closed opportunities. Six Slicer controls allow you to quickly filter the closed opportunities by year, month, team (group), sales representative, distribution of monthly recurring revenue amount, and distribution of one-time revenue amount. Eleven charts and two tables display data by different criteria including total revenue, revenue type, sales representatives, or the age of the opportunity at close. Below the chart, an additional table displays all the opportunities included in the filtered results.

Refer to "Explore Closed Opportunities" on page 104.

Forecasting

Use this worksheet to find and follow data on revenue forecasts. Eight Slicer controls allow you to quickly filter your fore-cast data by projected close date (both past and future), team (group), sales representative, monthly recurring or one-time revenue amount, probability, stage, and activity. Fifteen charts and two tables display data by different criteria including Group, Probability, Resources, and Opportunities by Create Date. Below the charts, an additional table displays all the opportunities included in the filtered results.

Refer to "Explore Revenue Forecasting" on page 112.

Fiscal Year (Current and Previous)

The Fiscal Year tabs contain all the closed opportunity data that appears in charts on the other worksheets. On these tabs, you can also change the labels on groups (Sales Teams or custom groups) and set monthly revenue goals.

Refer to "Sales Plan and Analysis - Current and Previous Fiscal Year " on page 119.

Year to Date Sales Trends

On the Trends worksheet you can quickly assess trends in year to date revenue and compare actual revenue to your revenue goals. Twenty-two charts break out the data by both monthly recurring and one time revenue, and by up to five types of fees. Six charts added in version 1.2 break out total revenue, costs, and gross margin data.

About the Overall Metrics

Six critical metrics for year to date revenue appear in large type at the top of this page: Monthly (that is, monthly recurring revenue), One-Time (one-time revenue), Monthly Average, One-Time Average, Monthly Days to Close, and One-time Days to Close.

Days to close equals the average number of days required to close the opportunities included in the revenue totals.

Using the Charts

The twenty-eight charts on this worksheet are divided into groups:

- **Monthly Revenue Trends** and **One-Time Revenue Trends**

  The charts in these two groups, six Monthly Revenue charts and six One-Time Revenue charts, are the same; they just display data for different revenue types.

- **Total Revenue and Cost Trends** version 1.2 only

  The six charts in this group include 2 gross margin charts. All six charts in this group have Plan Lines.

- **Opportunity Advanced Field Trends** (Type of Fee)

  The Advance Fields for most workbooks are populated with Fee Types. The charts include both a basic revenue chart and a cumulative revenue chart for each fee type (up to five).

The **examples** for Monthly and One-time Revenue and Opportunity Advanced Field (Fee Type) use data for January through April only. Selected charts include a Revenue Plan line.

Examples for Total Revenue and Cost Trends include a full year of data.

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

Revenue Plan Line: Setting or Editing Values

Several charts on this worksheet feature a Revenue Plan line based on your own revenue goals. To use the revenue plan lines, you must first enter your monthly revenue goals into the current Fiscal Year worksheet (Fiscal Year tab). In selected charts, the values you enter on that worksheet appear as a revenue plan line. You can then compare your goals to actual revenue.

Before you edit the workbook, always **save a backup copy**.

For detailed instructions, refer to "Sales Plan and Analysis - Current and Previous Fiscal Year " on page 119.

Monthly (MRR) and One Time Revenue Trends

The six Monthly and six One Time revenue charts on the Trends worksheet are identical except for the type of data they display. The descriptions of the six charts below apply to both the monthly (MRR) and one time charts. The images used in the examples are Monthly (MRR).

In your workbook, it is possible that the amounts displayed on the Y axis will differ from the examples below. The charts in your workbook reflect the totals and distribution from your own data.
In most cases, the Y axis values differ between the monthly and one-time charts.

Revenue versus Plan
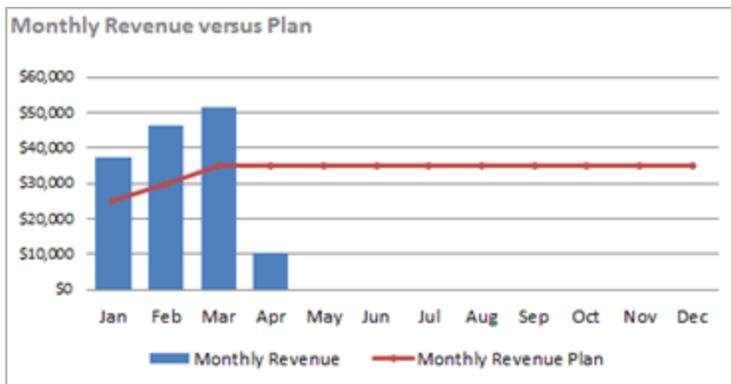
Y Axis = Amount of revenue
X Axis = Months
Line = Monthly Revenue goals
Columns = Actual revenue generated each month.

The worksheet also includes a One Time revenue chart.

View the amount of revenue, for the specified type, that is generated each month. Compare the actual revenue (columns) to the goals set in the revenue plan (line).

Insights: Is your revenue growing? Are you meeting your goals - always, sometimes, or never? Do your sales reflect seasonal trends or some other outside influence? If you're meeting your goals, what are you doing right and can you achieve even more?
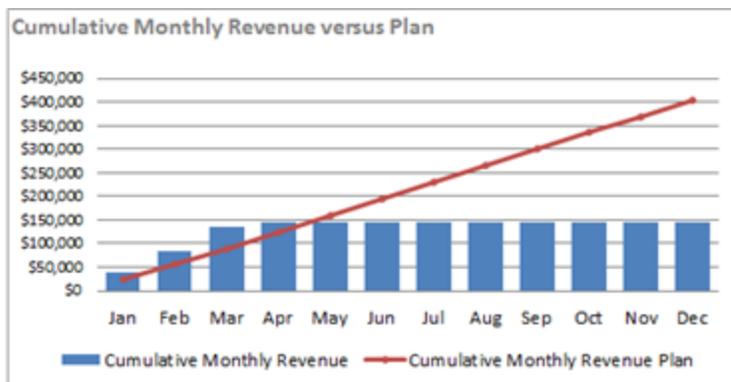
Cumulative Revenue versus Plan

Y Axis = Cumulative amount of revenue
X Axis = Months
Line = Monthly Revenue Plan
Columns = Actual revenue generated year to date.

The worksheet also includes a One Time cumulative revenue chart.

View the cumulative revenue over time. Compare the actual revenue (columns) to the goals set in the revenue plan (line).

Insights: It's easy to see that this year got off to a great start! But, if the monthly totals fluctuate and you don't always meet the monthly goal, you can see if cumulative goals are being met or if you're in a long term downward trend.

Average Monthly Revenue (Average Revenue per Opportunity by Month)
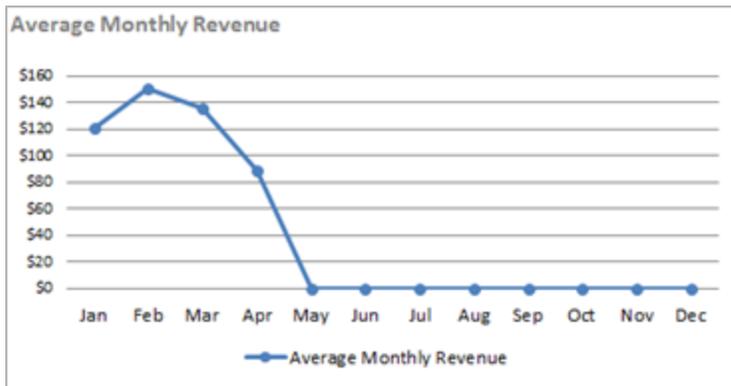
Y Axis = Amount of Revenue
X Axis = Months
Line = Average revenue per opportunity closed

The worksheet also includes a One Time average revenue chart.

View the average revenue generated for opportunities closed each month (that is, total revenue from opportunities closed during a month, divided by total count of opportunities closed in that month.)

Insights: This chart shows a drop in *average* revenue per opportunity in March, but the Revenue versus Plan chart showed an increase in revenue in March. That means more opportunities closed but at a lower return per opportunity. If this becomes a trend, it could impact your business. Does the increased overhead for closing and supporting more deals have any significant effect on net profit? Or does this mean more customers that are likely to want more services?

Monthly Revenue Range (Distribution of Revenue for Opportunities Closed)
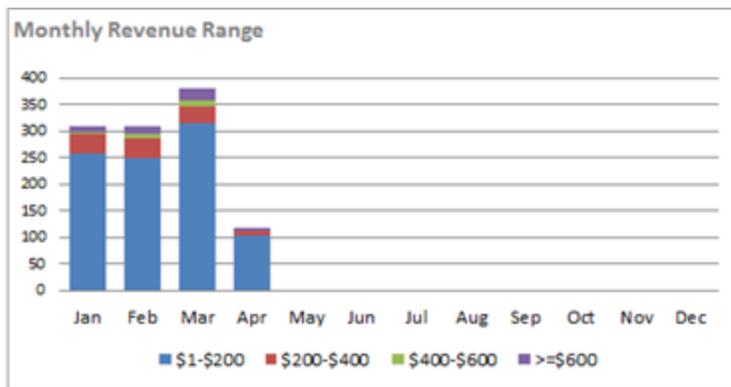
Y Axis = Number of opportunities closed
X Axis = Months
Columns - number of deals closed that generated the amount of revenue indicated by color in the chart legend

The worksheet also includes a One Time Revenue Range chart.

View how many closed opportunities generated revenue within the specified amounts. In the example, 257 of the opportunities closed in January generated revenue between $1 and $200.

💡 In your workbook, hover over the column to see the exact number of opportunities.

Insights: If most of your revenue is generated by smaller deals, you might want to explore why. For example, is that driven by the market, or are you generating leads that generate less revenue? Is your sales team missing opportunities to up-sell?

Average Age to Close Monthly Revenue (Revenue by Average Age of Opportunities at Close)
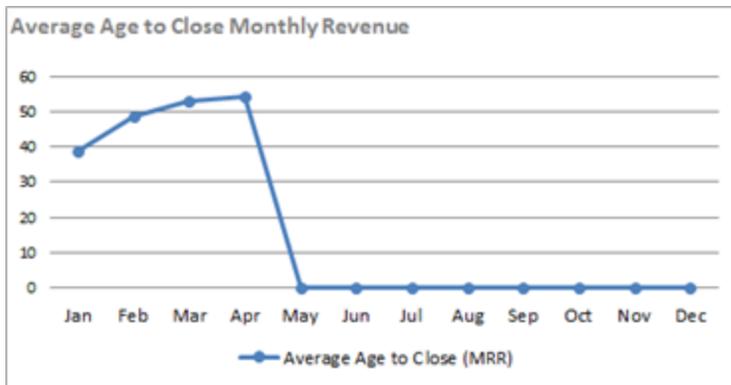
Y Axis = Number of days to close
X Axis = Months
Line = Average age (in days) of opportunities when closed.

The worksheet also includes a One Time revenue chart.

View the average number of days it took to close the opportunities that were closed each month.

Insights: Are there seasonal trends for age to close? If your deals continue to age through the year, which ones should you push harder to close and which ones are not likely to close?

Age to Close Monthly Revenue Range (Distribution of Opportunities by Age at Close)
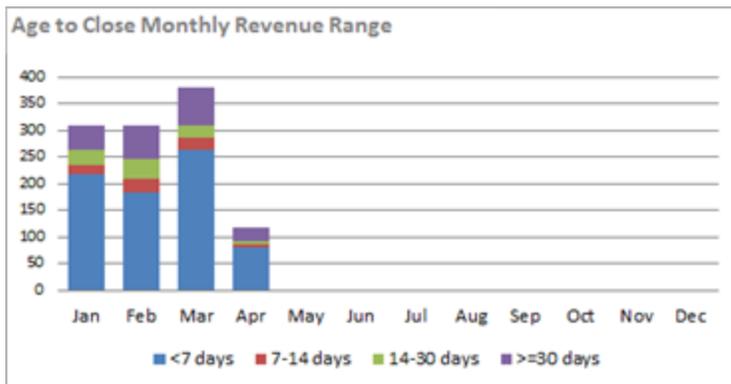
Y Axis = Number of monthly revenue opportunities closed
X Axis = Months
Columns - The number of opportunities closed within the number of days indicated by color in the chart legend

The worksheet also includes a One Time chart.

For opportunities that closed during the month indicated, view how many opportunities fell within each time range for days to close.

Insights: Are you closing most of your opportunities in a reasonable amount of time, or is it taking over thirty days for most of your deals to close? If most of your revenue is coming from older opportunities, you might want to dig deeper. Are the older opportunities larger and more complex projects that take longer to close? Or are some sales teams taking longer to close opportunities?

Total Revenue and Cost Trends versus Plan (version 1.2 only)

The six charts in this section let you view your total revenue and your total costs from both monthly and one time opportunities closed during the specified time. If you enter your revenue Plan figures in the Current FY tab, you can compare actual revenue and cost against your plan.

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These six charts were added in version 1.2 of the sales workbook. The images in this section were taken from a different Sales workbook than the other images in this topic so the data described here does not correspond to the other charts.

Total Revenue (Opportunity) versus Plan

Y Axis = Amount of revenue
X Axis = Months
Line = Revenue Plan goals
Columns = Actual revenue generated each month.

View the combined monthly and one-time revenue amount from opportunities closed each month. Compare the actual revenue (columns) to the goals set in the revenue plan (line).

Cumulative Total Revenue versus Plan
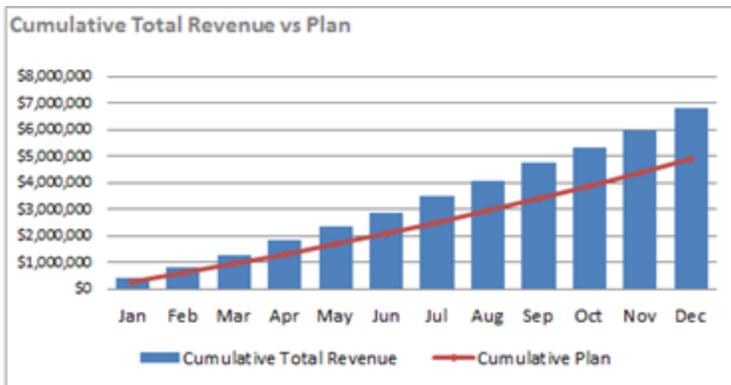
Y Axis = Cumulative amount of revenue
X Axis = Months
Line = Revenue Plan
Columns = Actual revenue generated year to date.

View the cumulative revenue generated from closed monthly and one-time opportunities closed during the specified time. Compare the actual revenue (columns) to the goals set in the revenue plan (line).

Total Cost (Opportunity) versus Plan

Y Axis = Cost amount
X Axis = Months
Line = Planned Costs
Columns = Total cost generated by monthly and one-time opportunities closed.

View the cost associated with all opportunities closed each month. Compare the actual costs (columns) to the expected costs set in the revenue plan (line).

Cumulative Total Cost versus Plan
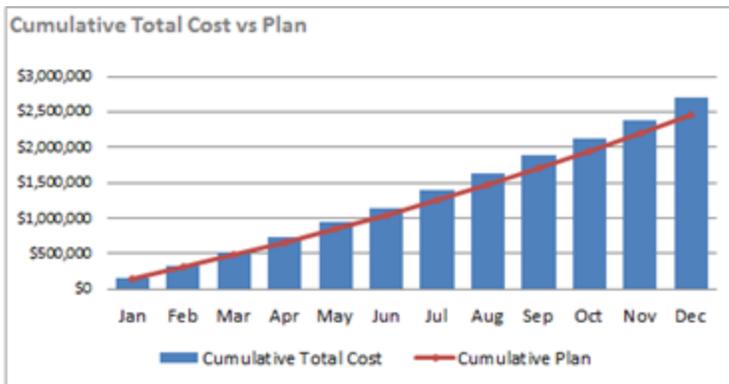
Y Axis = Cumulative cost amount
X Axis = Months
Line = Planned costs
Columns = Actual costs generated year to date.

View cumulative total of the cost of opportunities closed each month. Compare the actual costs (columns) to the goals set in the revenue plan (line).

Insights: The cost to revenue values may vary month to month, but the cumulative totals let you see at a glance whether you are keeping your costs in line.

Total Gross Margin (Opportunity) versus Plan

Y Axis = Gross Margin (Total Revenue from Closed Opportunities minus Total Cost of closed Opportunities)
X Axis = Months
Line = Revenue Plan goals for gross margin
Columns = Calculated gross margin for each month.

View the calculated gross margin for all opportunities closed each month. Compare the actual gross margin (columns) to the goals set in the revenue plan (line).

Cumulative Gross Margin versus Plan
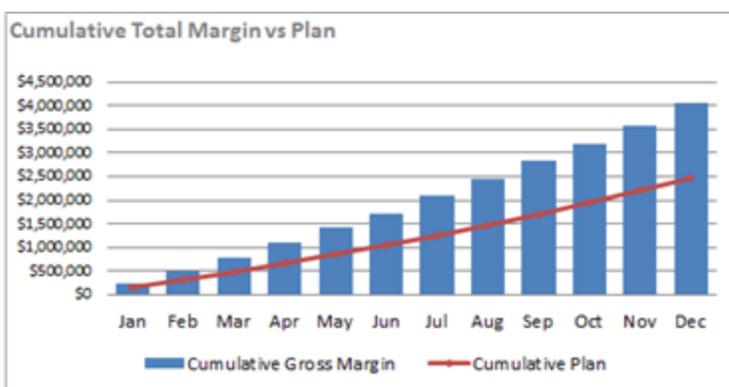
Y Axis = Cumulative gross margin
X Axis = Months
Line = Cumulative plan for gross margin
Columns = Cumulative gross margin by month.

View cumulative gross margin for opportunities closed each month. Compare the actual cumulative gross margin (columns) to the goals set in the revenue plan (line).

Opportunity Advanced Field Trends

There are up to ten charts in this section, depending on how many Advanced Field types your company has set up. Autotask allows up to five advanced fields. Most workbooks use the Advanced Fields to display revenue from Fee Types. The examples below display revenue from Fee Types. You can work with Autotask to use the Advanced Fields for different revenue sources.

For each Advanced Field, there are two charts, Revenue versus Plan and Cumulative Revenue versus Plan. Each of the charts in this section can include a Revenue Plan line.

There are only two sample charts displayed in this section. In your workbook, the same two chart types are used for each Advanced Field configured for your workbook.

[Advanced Field] Revenue versus Plan
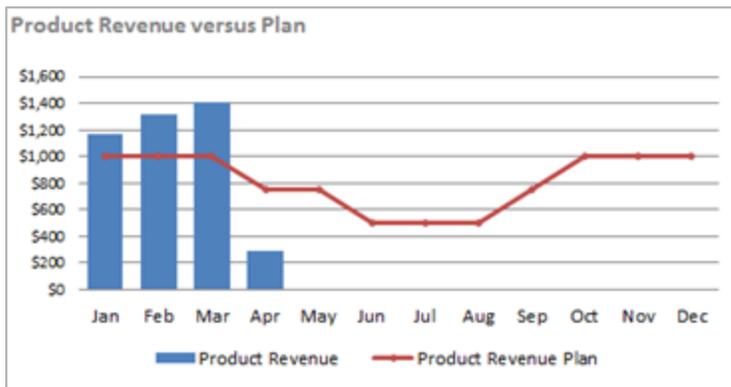
Y Axis = Amount of revenue
X Axis = Months
Line = Monthly Revenue Plan for the fee type
Columns = Actual revenue generated by indicated fee type for each month.

View the revenue generated each month by the source represented by the Advanced Field. Compare the actual revenue (columns) to the goals set in the revenue plan (line).

Insights: See how much revenue your company generates from the different fee sources represented by the Advanced Fields. Are you meeting or exceeding your revenue goals for this revenue source?

Cumulative [Advanced Field] Revenue versus Plan
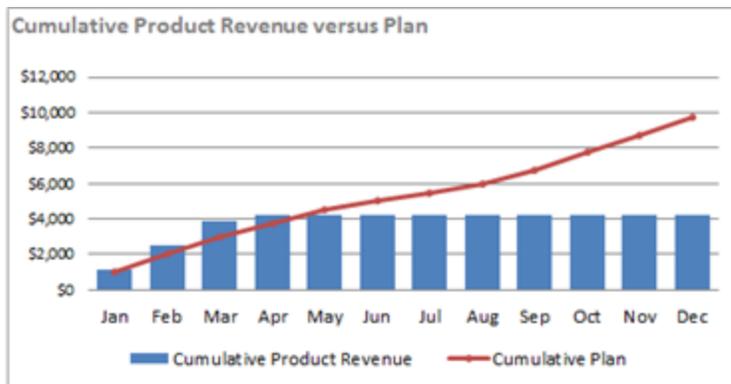
Y Axis = Cumulative amount of revenue
X Axis = Months
Line = Cumulative Monthly Revenue Plan for the specified source, calculated from the Fee Type monthly revenue plan data.
Columns = Actual revenue generated year to date.

View the cumulative revenue generated by the specified Fee Type by month over the year. Compare the actual revenue (columns) to the goals set in the revenue plan (line).

Insights: Is your cumulative revenue from this fee type meeting you expectations? How does it compare to the other types of fees? If this fee type is falling behind, is this a new or long term trend? Does it reflect the current market? Or do you need to rethink your marketing strategy? Maybe your sales team just needs more information to present to the prospects.

Trending - Year Over Year (version 1.2)

On this tab, added with version 1.2, you can compare revenue and cost trends in the current fiscal year with the same trends from the previous fiscal year. Of course, new users will need to be patient.

About the Overall Metrics

Six critical metrics for year to date revenue appear in large type at the top of this page: Monthly (that is, monthly recurring revenue), One-Time (one-time revenue), Monthly Average, One-Time Average, Monthly Days to Close, and One-time Days to Close.

Days to close equals the average number of days required to close the opportunities included in the revenue totals.

Using the Charts

The nineteen charts on this worksheet are divided into three groups: Monthly (recurring) Revenue (MRR) Trends, One-Time Revenue Trends, and Total Revenue and Cost Trends. The five Monthly and five One-Time Revenue charts are the same, they just display data for the two different revenue types.

Six Total Revenue and Cost Trend charts display total revenue, cost, and gross margin data for closed opportunities by month. The remaining three charts in this group display quarterly data.

All examples below present data for January through April only.

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

Previous Fiscal Year Data Lines

The line representing the previous fiscal year pulls data from the Previous FY tab. You can go directly to the tab to view previous year information in one large spreadsheet.

Monthly (MRR) and One Time Revenue Trends

The five Monthly and five One Time revenue charts on the Trends worksheet are identical except for the type of data they display. The descriptions of the five charts below apply to both the monthly (MRR) and one time charts. The images used in the examples are Monthly (MRR).

In your workbook, it is possible that the amounts displayed on the Y axis will differ from the examples below. The charts in your workbook reflect the totals and distribution from your own data.
In most cases, the Y axis values differ between the monthly and one-time charts.
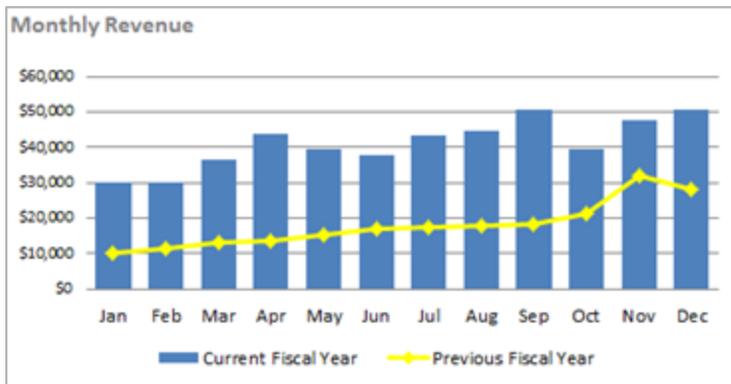
Revenue

Y Axis = Amount of revenue
X Axis = Months
Line = Previous fiscal Year Revenue
Columns = Revenue generated each month for current fiscal year.

The worksheet also includes a One-time Revenue chart.

View the amount of revenue, for the specified type, that is generated each month during the current fiscal year. Compare this year's revenue (columns) to the revenue generated for the same month in the previous year.

Insights: Is your revenue growing? Are you exceeding your revenue from the last fiscal year? If not, are you dealing with economic trends beyond you control? Or, do you need to make some changes to maintain strong growth for your company.

Cumulative Revenue
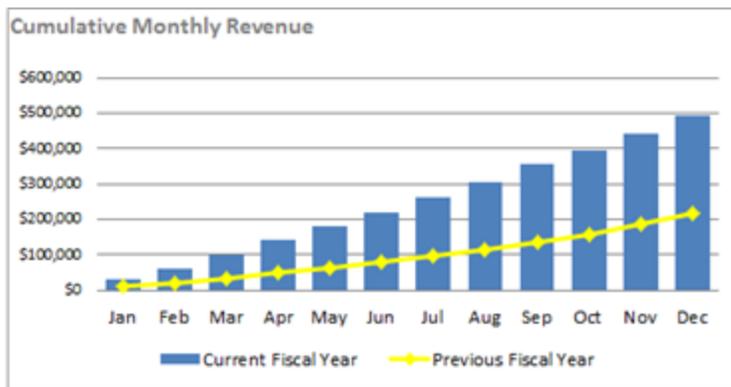
Y Axis = Cumulative amount of revenue
X Axis = Months
Line = Previous fiscal year cumulative revenue
Columns = Revenue generated this year to date.

The worksheet also includes a Cumulative One Time Revenue chart.

View the cumulative revenue over time. Compare the current year's cumulative revenue (columns) to the previous year's (line).

Insights: In this chart you can see how cumulative revenue at this point in the year compares to the previous year cumulative revenue. Overall, are you pulling ahead of last year or lagging behind? What can you do to pull ahead even further?

Average Monthly Revenue (Average Revenue per Opportunity by Month)
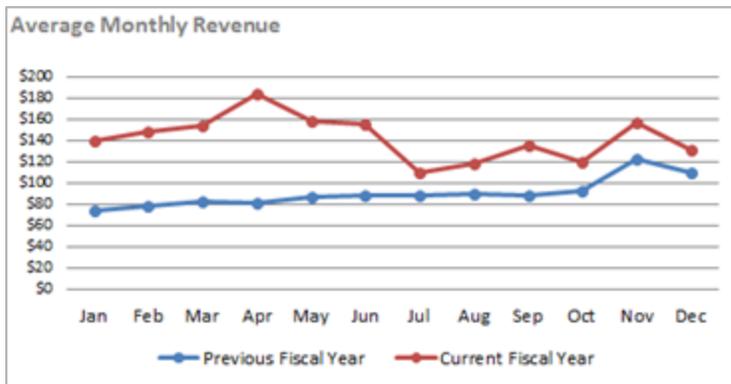
Y Axis = Amount of Revenue
X Axis = Months
Lines = Average revenue per opportunity closed. One line for current year and one line for previous year. Check the legend on your chart to see which color is which.

The worksheet also includes an Average One Time Revenue chart.

View the average revenue generated per opportunity closed each month (that is, total revenue from opportunities closed during a month, divided by total count of opportunities closed in that month.) Compare to the average revenue generated per opportunity in the previous year.

Insights: What is the average revenue per opportunity closed each month this year compared to the previous year. Ideally, your opportunities should be generating more revenue per opportunity. If your revenue is growing but your revenue per opportunity is decreasing, your sales team is closing more, smaller deals. Does the increased overhead for closing and supporting more deals have any significant effect on net profit? Or does this mean more customers that over time may buy more services?

Average Age to Close Revenue (Revenue by Average Age of Opportunities at Close)
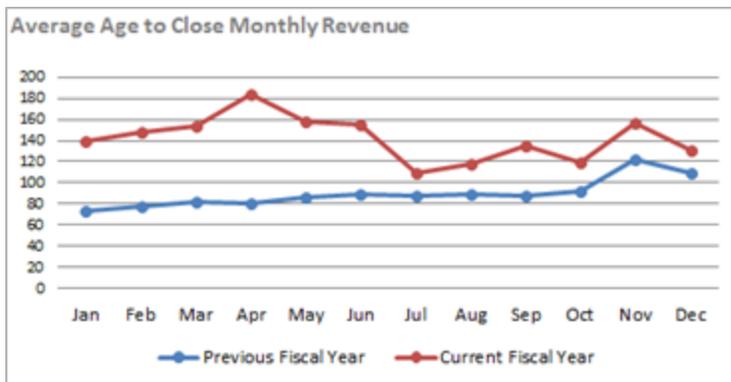
Y Axis = Number of days to close
X Axis = Months
Line = Average age (in days) of opportunities when closed.

The worksheet also includes a One Time revenue chart.

View the average number of days it took to close the opportunities that were closed each month.

Insights: Are there seasonal trends for age to close? If your deals continue to age through the year, which ones should you push harder to close and which ones are not likely to close?

Quarterly Revenue
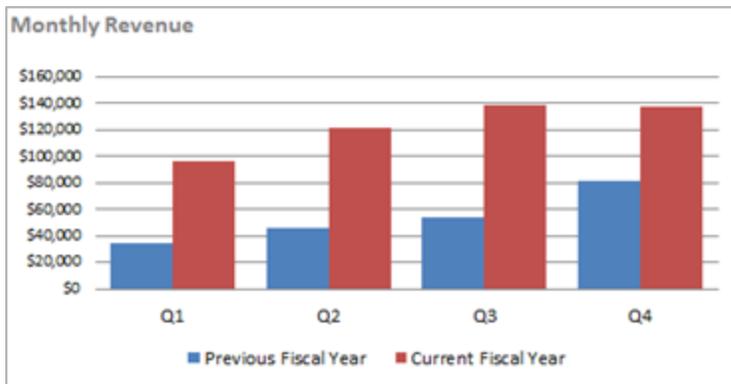
Monthly Revenue

Y Axis = Revenue

X Axis = Fiscal year quarters

Columns - The revenue from Opportunities of the specified type(monthly or one-time) that were closed during the quarter indicated. One color is current fiscal year, the other color is previous fiscal year. Check the legend on your chart to determine which color is current and which is previous.

The worksheet also includes a One Time Revenue by quarters chart.

View total revenue generated by opportunities closed during each quarter. Compare current and previous year quarterly revenue.

Total Revenue and Cost Trends (for Monthly and One-time Opportunities closed)

The 9 charts in this section display your total sales revenue (monthly and one time opportunities closed), total opportunity costs, and gross margin for both the current and previous fiscal years. Six of the charts display data by month and three display data by quarters.

Total Revenue (Monthly and One-time Opportunities closed)
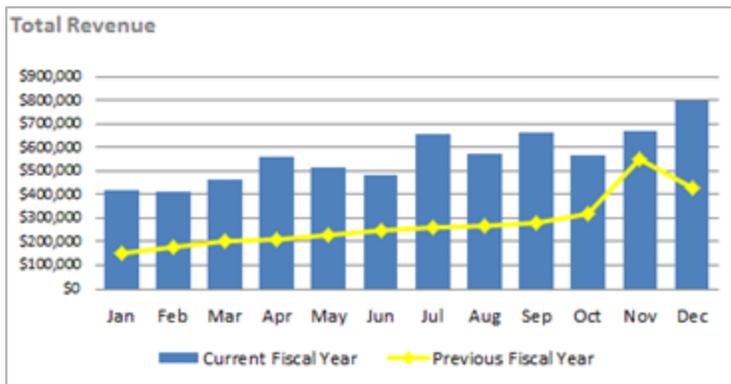
Total Revenue

Y Axis = Amount of revenue

X Axis = Months

Line = Previous fiscal year revenue

Columns = Current fiscal year revenue generated each month.

View the total amount of revenue that is generated by monthly and one-time opportunities that are closed each month. Compare the current year's revenue (columns) to the previous year's revenue (line).

Insights: This chart and the following "Total" charts let you see how your company is doing with overall sale this year, and how this year compares to last year. Are sales better overall this year? If you have a dip or plateau, does it mimic results for the same time last year? Or is this year very different - if so, why?

Cumulative Total Revenue (Monthly and One-time Opportunities closed)
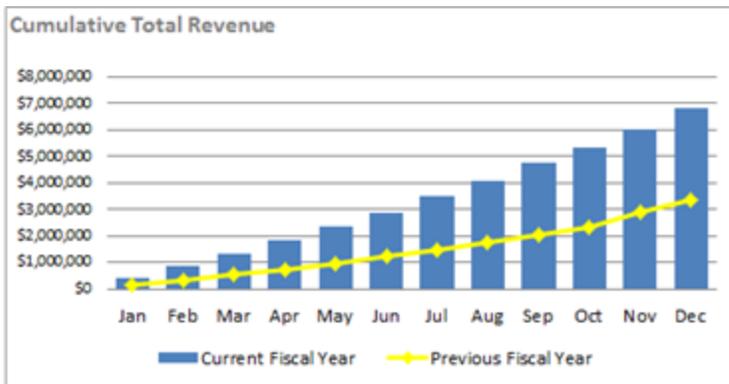
Y Axis = Cumulative amount of revenue
X Axis = Months
Line = Previous fiscal year revenue
Columns = Total revenue generated year to date.

View the cumulative revenue for the current fiscal year over time. Compare the current year's revenue (columns) to the previous year's revenue (line).

Total Cost (Monthly and One-time Opportunities closed)
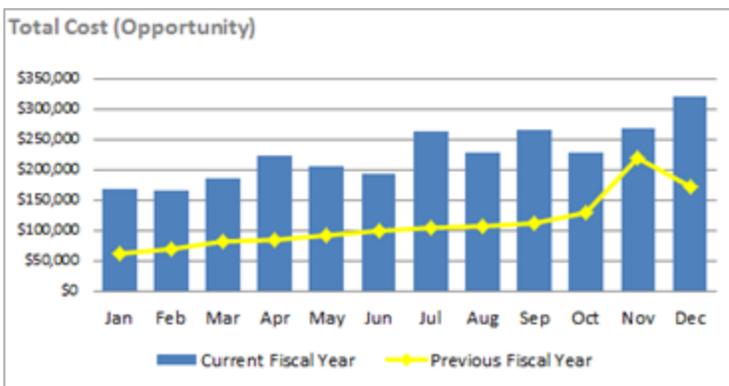
Y Axis = Costs amount
X Axis = Months
Line = Previous fiscal year opportunity costs
Columns = Total costs incurred each month in the current fiscal year.

View the how much your combined one-time and monthly opportunities cost you each month. Compare the current year's costs (columns) to the previous year's costs (line).

Insights: It is critical to monitor your overall costs. Costs will likely rise from one year to the next as revenue increases. If the increase in the current year is much larger than the previous year, you need to pinpoint the source of the increased costs.

Cumulative Total Cost (Monthly and One-time Opportunities closed)
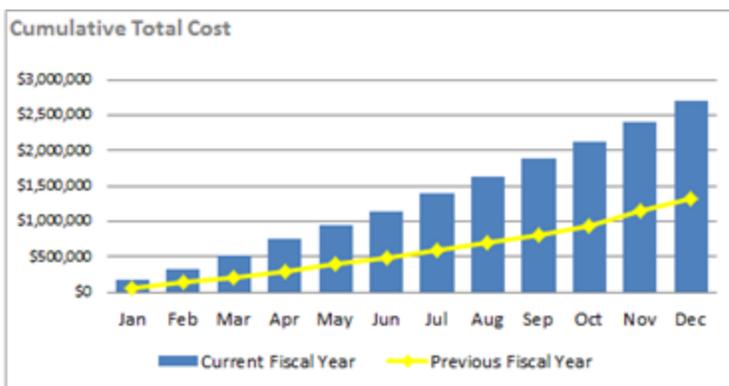
Y Axis = Cumulative cost amount
X Axis = Months
Line = Previous fiscal year opportunity costs
Columns = Total opportunity costs generated year to date in the current fiscal year.

View cumulative total opportunity costs over time. Compare the current fiscal year's costs (columns) to the previous year's costs (line).

Total Gross Margin (Monthly and One-time Opportunities closed)
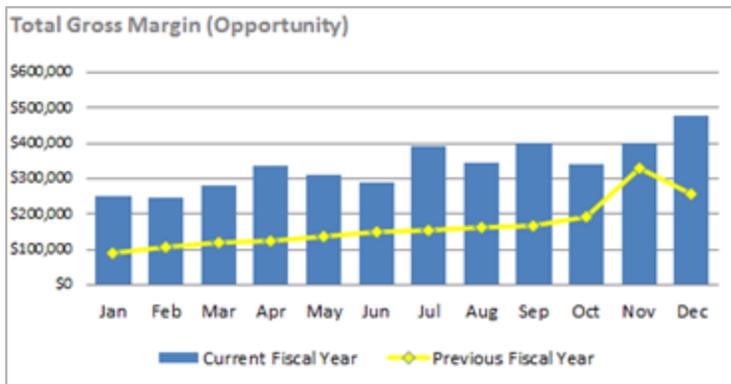
Y Axis = Gross Margin Amount (Total Revenue from Closed Opportunities minus Total Cost of closed Opportunities)
X Axis = Months
Line = Previous fiscal year's gross margin amounts
Columns = Current fiscal year's gross margin for each month.

View the calculated gross margin for each month in the current fiscal year. Compare the current year's gross margin (columns) to the previous year's gross margin (line).

Insights: Your total gross margin displays the relationship between your revenue and costs. If your gross margin is holding steady, you are maintaining a positive cost to revenue relationship.

Cumulative Gross Margin (Monthly and One-time Opportunities closed)
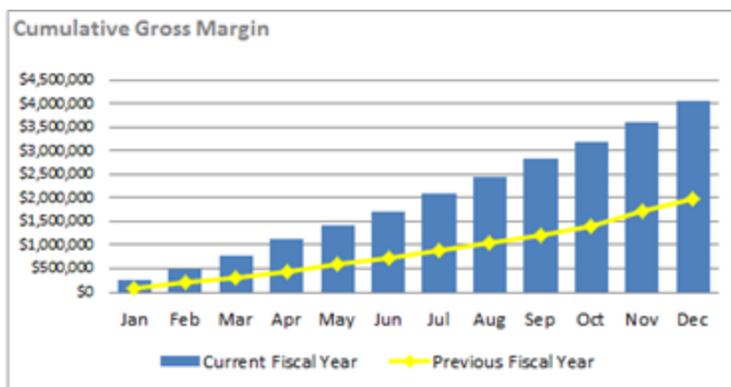
Y Axis = Cumulative gross margin (Total Revenue from Closed Opportunities minus Total Cost of closed Opportunities) amount
X Axis = Months
Line = Cumulative total gross margin for the previous fiscal year
Columns = Current fiscal year's cumulative gross margin each month.

View the cumulative gross margin from opportunities closed over time. Compare the current cumulative gross margin (columns) to the previous years gross margins (line).

Total Revenue (Monthly and One-time Opportunities closed) by fiscal quarter
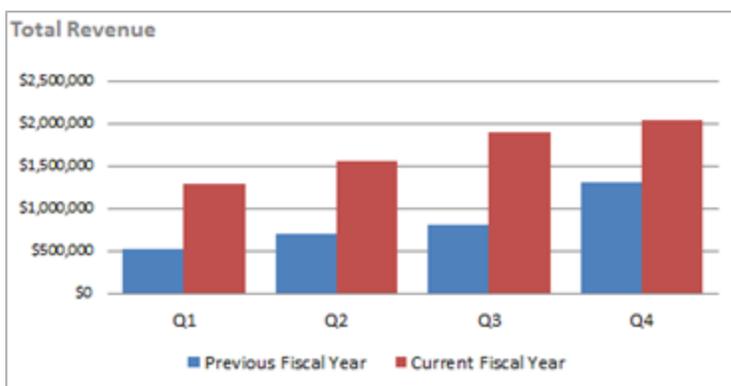
Y Axis = Revenue
X Axis = Fiscal year quarters
Columns - The total revenue from all Opportunities closed during the quarter indicated. One color is current fiscal year, the other color is previous fiscal year. Check the legend on your chart to determine which color is current and which is previous.

View total revenue generated by opportunities closed during each quarter. Compare current and previous year quarterly revenue.

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Insights: Another way to compare your revenue, costs, and gross margin from one year to the next, the quarterly columns give you an overview of each quarter, and what the trends are for the year. The revenue chart looks the way you want it to look - steady growth and an increase in revenue from the previous year.

Total Cost (Monthly and One-time Opportunities closed) by fiscal quarter
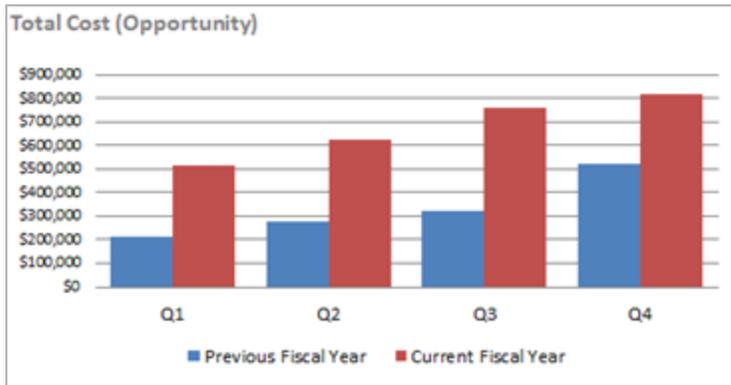
Y Axis = Costs amount
X Axis = Fiscal year quarters
Columns - The total costs associated with all Opportunities closed during the quarter indicated. One color is current fiscal year, the other color is previous fiscal year. Check the legend on your chart to determine which color is current and which is previous.

View total costs associated with opportunities closed during each quarter. Compare current and previous year quarterly opportunity costs.

Insights: This chart shows rising costs, and higher costs than the previous year. But the increase is steady, and appears to be in proportion to the rise in revenue. The gross margin figures will bring the cost and revenue data together.

Total Gross Margin (Monthly and One-time Opportunities closed) by fiscal quarter
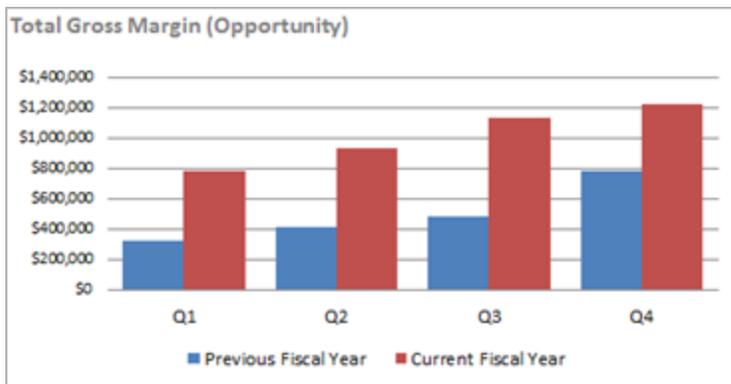
Y Axis = Gross margin amount
X Axis = Fiscal year quarters
Columns - The total gross margin for all Opportunities closed during the quarter indicated. One color is current fiscal year, the other color is previous fiscal year. Check the legend on your chart to determine which color is current and which is previous.

View the total gross margin for all opportunities closed during each quarter. Compare current and previous year quarterly opportunity gross margin amounts.

Opportunities Closed Last Month and Closed This Month

From these two worksheets, Opportunities Closed This Month and Opportunities Closed Last Month, you can quickly assess and compare the performance of your sales teams during the previous and current calendar month.

Insights

If you can find ways to help all your teams do their best, everyone benefits. If one team consistently shows different results, you can explore why. If one team consistently generates more revenue from month to month, what can the other teams learn from them? If one team is not keeping up, what can they do to improve their results? You can use the Closed Opportunities and Forecast opportunities worksheets to dig deeper. Does one team do best with a certain type of opportunity or customer? Do all teams have a good balance of opportunities at all stages in their pipeline?

About the Overall Metrics

Three key metrics are displayed in large type at the top of the page: Monthly (total monthly recurring revenue from opportunities closed during the month), One Time (total one time revenue from opportunities closed during the month) and Deals (total number of opportunities closed during the month).

For the worksheet "Closed This Month", the revenue is based on opportunities closed up to the current date.

Using the Charts

The six charts on each worksheet are divided into two sections: Monthly Recurring Revenue (MRR), and One Time revenue. Each section contains three charts.

Two of the three charts in each section break out the data by group. The examples below show the default groups, sales teams. You can change the group names on the Config tab or work with Autotask to change which groups are presented. Refer to "Take Your Workbook to the Next Level" on page 12.

The third chart displays the revenue generated by up to 5 top sales representatives for the month.

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

In the following examples, when a chart has both a Monthly and a One-Time revenue version, the images use the monthly (MRR) version. The X and Y axis will represent the same data but for both revenue types but, in most cases, the Y axis tick-marks will have different values.

Revenue - Running Total by Team
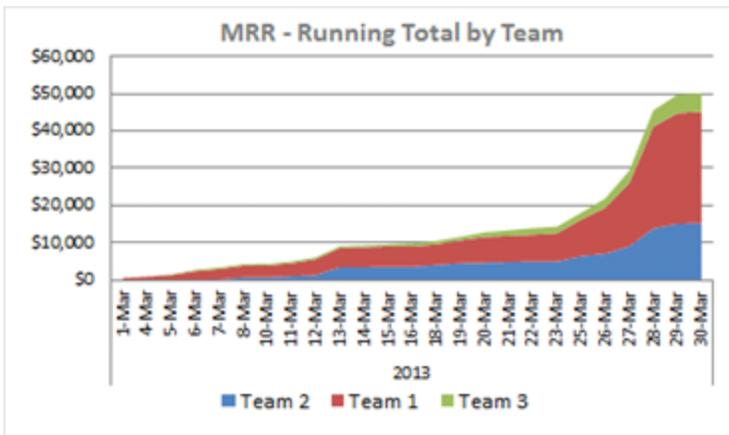
Y Axis = Amount of revenue
X Axis = Days of the month
Lines = Revenue generated by team as indicated:
Blue (bottom line in image) Team 2, Red (midline in image)
Team 1, Green (top line in image) Team 3

The worksheet also includes a One-Time Running Totals chart.

View the cumulative revenue generated by each team during the month. Compare the total amount generated per team.

Revenue - Percent of Total Closed by Team
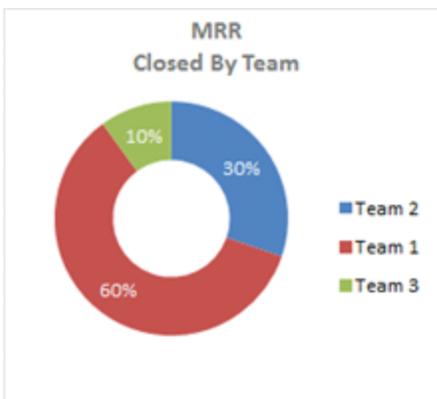
Each sector represents the percentage of total revenue generated by one team as indicted in the legend:
Blue - Team 2, Red - Team 1, Green - Team 3

The worksheet also includes a One-Time Closed by Team chart.

Compare the percentage of revenue closed by each team.

Place your cursor on a sector to see the amount of revenue generated.

Revenue Totals for Top 5 Sales Representatives
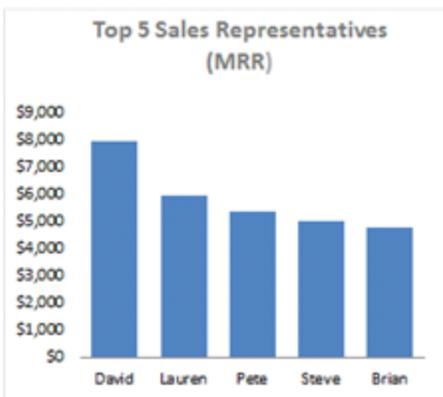
Y Axis = Amount of revenue
X Axis = Sales representatives

View the total revenue generated by each of the 5 sales representatives with the greatest total sales for the indicated revenue type for the month.

Each worksheet, Closed Last Month and Closed This Month, include 2 charts for the top 5 sales representatives, one for Monthly Recurring and one for One-time revenue.

List of Closed Deals

Below the charts there is a list of all opportunities closed during the month; that is, the previous calendar month or the current calendar month depending on which worksheet is open. To locate specific opportunities, you can sort the list by the Close Date, Opportunity ID, Opportunity Name, Sales Person, or Revenue.

To view the opportunity details in Autotask, double-click the Opportunity ID. If you are not logged into Autotask, enter your login credentials when prompted. Autotask security level permissions apply.

Explore Closed Opportunities

In this worksheet you can drill deeper into your sales revenue history. If your other worksheets indicate an unusual trend over a few months, or an anomaly in one month, in this worksheet you can filter to view details about deals closed during those time periods. You can also view results from the same time period in previous years to see how the current results compare. And you can isolate data by team, sales representatives, or the range of revenue amount.

About the Overall Metrics

The metrics that display in the upper left corner of the worksheet reflect the data from the worksheet after filters are applied. You can quickly see the number of closed deals that meet your search criteria. You can also see the monthly revenue and one-time revenue totals from those deals. For example, if you filter by team 1, you will see the number of deals closed by team 1 and the revenue totals from those deals.

How to Explore

Review the available charts and tables. The six filters are located across the top of the page: Year, Month (and year), Grouping (Teams), Sales Rep, MRR (Monthly Revenue), and One Time Range. Decide which filters will focus in on the data that will be most useful. Then, apply the filters as described below. 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 metrics at the top of the page and all charts and tables update immediately to reflect the data from opportunities that meet the selected criteria. You can apply additional filters as needed.

Insights

To take your company to the next level, you need to look at what you have been doing, what is working well and what is just holding steady. For example, larger, one time deals look great on paper and the income can help your company grow. But, have you been bringing in the monthly revenue needed to sustain that growth? And if your monthly revenue is steady, are you bringing in the larger, one time revenue sources needed to invest in growth?

On this worksheet you can explore your closed opportunities for monthly recurring and one time revenue, along with related data. Use the filters to look at the data in different ways. Look for both the positive results and the not so positive results. Drill down to view details. What can you learn from successes and failures that you can apply to newer revenue opportunities? What are successful sales reps doing that other reps should be doing? Does the age of your opportunities impact the net revenue they bring in? Are you generating enough leads of the right type? Are you focusing your resources where they are most productive?

Using the Tables

Three tables appear on this worksheet. Each displays a list of Opportunities that meet the filter criteria that you applied.

Double-click the Opportunity ID column to open the opportunity detail in Autotask. If you are not logged into Autotask, enter your log in credentials when prompted. Autotask security permissions apply.

MRR and One-Time Top 10 Tables

These two tables include the top ten opportunities of the specified revenue type that meet the filtering criteria. You can see the opportunity ID, account name, the year and month the opportunity was closed, the sales representative that owns the opportunity, and the revenue amount.

Top 10 MRR Opportunities (Double Click on Opportunity ID to open in Autotask)

Opp ID	Account	Year	Month	Sale Rep	Monthly
34730502	Masixmo 2	2012	Jul	Pete	$8,493
35364411	Troy Beer 2	2012	Aug	Pete	$4,820
34741696	NeutralStar Ea:	2012	Nov	Anthony	$3,837
35272062	Allegiant Meth	2012	Jul	Pete	$3,018
35647724	0	0	0	0	$2,733
33355295	Royal Sports	2012	Jun	Adam	$2,676
35008838	Quaker Therap	2012	Apr	Anthony	$2,434
35277782	Mannix Intel Sc	2012	Sep	Matthew	$2,185
34240681	Sturm Ruger 2	2012	Mar	Pete	$2,164
35571492	J&L Foods East	2012	Dec	Matthew	$2,012

You can click the down arrow in any column to specify sort or search by options.

Closed Opportunities Table

This table is located at the bottom of the worksheet, below all charts. It lists all opportunities that meet the current filtering criteria on the worksheet. If no filters are selected, the table includes all closed opportunities from the years included in the data download.

In addition to providing the same details as the Top 10 tables, this list also displays the amount of revenue earned from each fee type (Adv1 through Adv5).

Using the Charts

To the left of and below the two "Top 10" tables there are eleven charts. Some charts are similar to charts on other work-sheets, except that you can filter to display specific data.

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

Monthly Revenue and One Time Revenue by Team

In the following examples, when a chart has both a Monthly and a One-Time version, the images use the monthly (MRR) version. The X and Y axis will represent the same data but, in most cases, the Y axis tick-marks will have dif-ferent values.
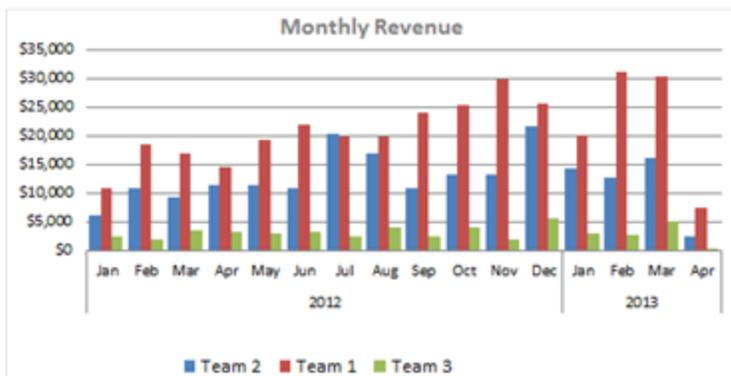
Y Axis = Amount of revenue
X Axis = Months
Columns = Revenue generated for each month by team (group).
Default column colors: As described in the legend below the x axis

The worksheet also includes a One-Time revenue chart.

View the monthly recurring or one time revenue generated by sales teams for each month. Present data for one or more years, individual months, or a range of months. View one team, or compare teams. Filter by individual sales rep-resentative to track the revenue they have generated.

Distribution of Revenue by Opportunity Amount
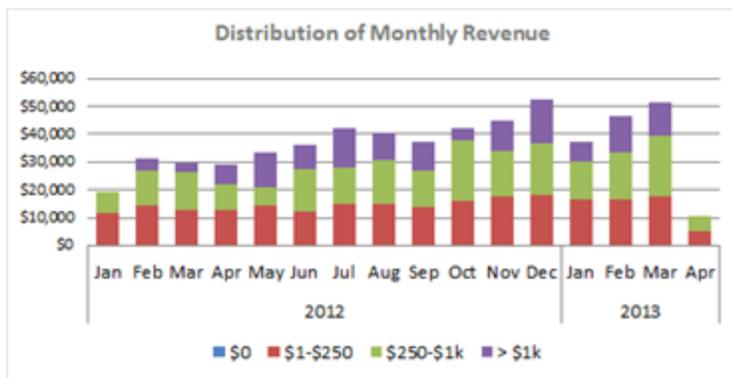
Y Axis = Amount of revenue
X Axis = Months
Columns = Total revenue generated by closed opportunities whose revenue falls within the specified amounts.
Column Color assignments: As described in the legend below the X axis.

The worksheet also includes a One-Time revenue distribution chart.

View the monthly recurring or one time revenue generated for each month in the year, individual months, or a range of months. Filter by revenue amounts, or by sales teams to see the size of opportunities closed by the specified team. You can even filter by individual sales representative.

Revenue by Fee Type and Team

This worksheet can display charts for up to 5 fee types. Each chart is identical except for the fee type displayed. They X axis will vary depending on the filter criteria and the Y axis may vary depending on the fee type.

Fee types are specific to your company. The example chart shows revenue from the fee type "Other". Your company may not have this fee type.
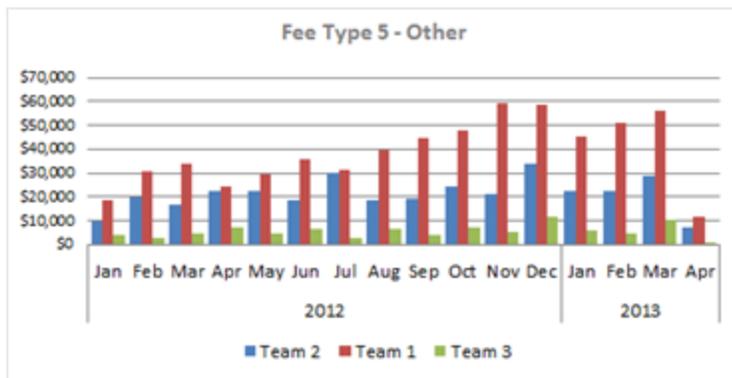
Y Axis = Amount of revenue
X Axis = Months
Columns = Revenue generated for each month by team (group)
Column color assignments: As described in the legend below the X axis

View the revenue generated by the specified fee type for each month in the year, individual months, or a range of months. View revenue amount generated by one team, two, or all teams. Filter each team by selected representatives.

Top Sales Representatives by Revenue and Number of Opportunities Closed
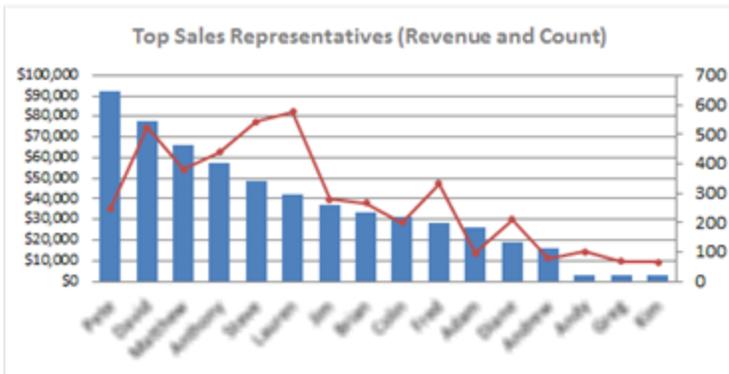
Y Axis = Amount of revenue
X Axis = Sales Representatives
Secondary value axis = Number of deals closed
Columns = Revenue generated by each sales representative
Red line = number of deals closed for each representative

View the revenue generated by each sales representative, ordered by highest to lowest amount. View the number of deals closed by each representative. Filter to view by team, by one or more selected representatives, or by year, month and year, or revenue range.

Opportunity Age at Close - by Team

Y Axis = Average Age of Opportunities at close
X Axis = Months
Lines = Average age of opportunities closed by the specified team
Line color assignments: As described in the legend below the X axis

View, by team, the average age of opportunities closed in the month indicated. Filter by one team, and then by one member of that team, to see each sales representative's average age to close. Or filter by revenue type to see differences between revenue types.

Revenue Forecast for the Current Calendar Month

Every new sales opportunity in Autotask requires a projected close date. The revenue estimated for an opportunity is fore-cast as revenue for the month of the projected close date. From the Forecast this Month worksheet, you can monitor your forecasted recurring monthly and one time revenue for the current calendar month. The charts present the revenue fore-cast by cumulative total, by team and by top 5 sales representatives, and by stage, with an indicator of average probability of closing at each stage.

About the Overall Metrics

Three key metrics are displayed in large type at the top of the page: Monthly (total monthly recurring revenue forecast for the month), One Time (total one time revenue forecast for the month) and Opportunities (or deals: the total number of opportunities expected to close during the month).

Insights

High revenue forecasts are not helpful to your company if only a small percentage of that revenue is realized. With this worksheet you can see not only your revenue forecast for the month, but also current information about the various stages of the opportunities and the probability of close. Sharing this information with the sales team can motivate team members and help them adjust their strategy as needed.

You can also combine the team and individual information with your knowledge of the teams' or sales representatives' his-tory to form more accurate predictions.

Using the Charts

The eight charts on this worksheet are divided into two sections, Monthly Recurring Revenue (MRR) forecasts and One Time revenue forecasts. There are four charts in each section: Running Total, Revenue by Group (Team), Revenue Fore-cast by the Top Sales Representatives, and Projected Revenue by Stage (includes probability of close for each stage).

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

In the following examples, when a chart has both a Monthly and a One-Time version, the images use the monthly (MRR) version.

Forecast Revenue - Running Total
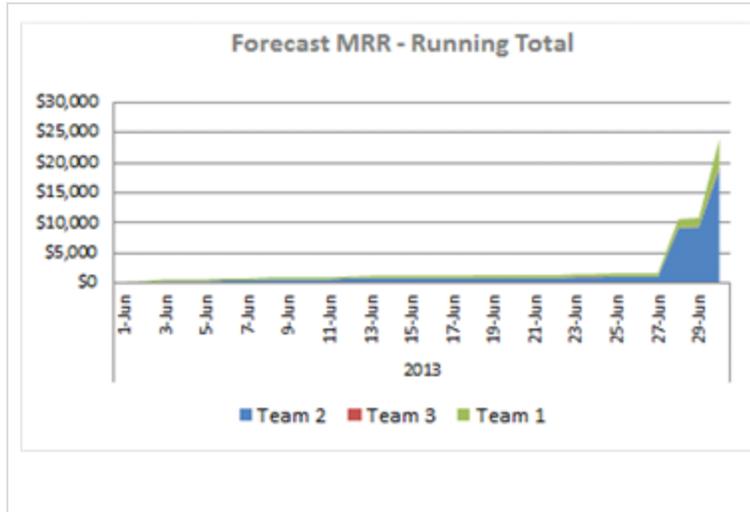
Y Axis = Amount of revenue
X Axis = Days of the month in 3 day increments
Solid areas = Revenue forecast by team as indicated:
Color assignments: As described in the legend below the X axis

The worksheet also includes a One Running Total forecast chart.

View and compare the revenue forecast from each team during the month.

In the example shown, forecast revenue for Team 3 was not statistically significant, so no red appears on the chart.

Projected Revenue by Group

The groups in the example below are the sales workbook default groups, sales teams. You can change the group names or work with Autotask to change the groups. Refer to **"Take Your Workbook to the Next Level" on page 12**.

Each sector represents the amount of the total forecasted revenue projected by one team as indicted:
Blue - Team 2, Red - Team 1, Green - Team 3

The actual revenue amount is displayed for each sector.

The worksheet also includes a Projected One-Time Revenue by Group chart.

Compare the total amount forecast by each team. The forecast revenue for Team 2 is much higher than the forecasts from the other teams. But, the Projected Revenue by Stage and Stage Average Probability chart shows a large amount of forecast revenue in stages with a lower probability of closing. How much of Team 2's forecast revenue is in those stages? The Forecasting worksheet (Forecast tab) provides detail information on each team's revenue forecast.

Revenue Forecast by the Top Sales Representatives (up to 5 representatives included)
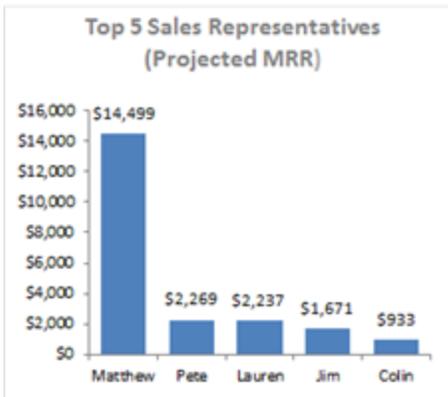
Y Axis = Amount of revenue
X Axis = Names of Sales Representatives
Columns = Revenue forecast by each representative

View and compare the revenue forecast for your sales representatives with the highest amount of revenue forecast. Chart will display up to five representatives.

Projected Revenue by Stage and Stage Average Probability
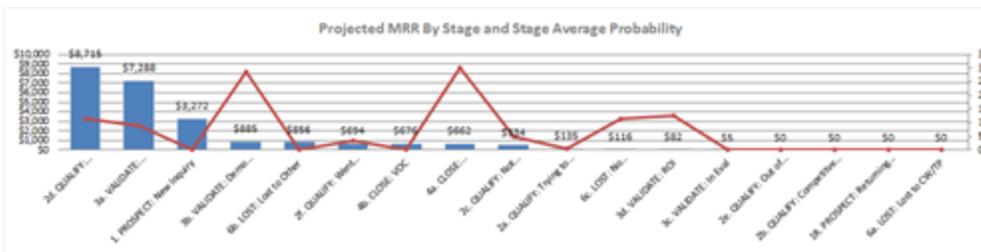
Y Axis = Amount of revenue

X Axis = Opportunity stages

Secondary value axis = average probability that opportunity will close

Columns = Revenue at each stage
Red line = for opportunities at this stage, the average probability that the opportunities will close.

View the distribution of forecast revenue by opportunity stage and view the average number of opportunities at this stage that will ultimately close.

List of Opportunities (Deals) Forecast to Close in the Current Month

This list appears below the charts. It includes all opportunities with a projected close date that falls in the current month. The charts on this worksheet pull their data from these opportunities.

Explore Revenue Forecasting

In this worksheet you can drill deeper into your sales revenue forecasts. If your other worksheets indicate an unusual trend in revenue forecasts over a few months, or an unusual result in one month, you can use this worksheet to view details about forecast activities from one or more specific months. In addition to viewing data by one or more months, you can also filter by team (group), sales representative, probability, stage, or the distribution of revenue amount for monthly or one-time revenue.

About the Overall Metrics

Three key metrics appear in large type at the top of the page. These metrics reflect the data from the worksheet after filters are applied. The numbers change each time you apply a new filter set.

Opportunities indicates the total number of opportunities (deals) that meet the specified criteria. **Monthly** and **One Time** indicate total forecasted revenue from Monthly Recurring and One Time opportunities.

How to Explore

Review the available charts and tables. The filters are located across the top of the page: Projected, Grouping (Teams), Sales Person, MRR (Monthly Revenue) Revenue Distribution, and One Time Revenue Distribution, Probability, Stage, and Activity.

Decide which filters will focus in on the data that will be most useful. Then, apply the filters as described below. 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 metrics at the top of the page and all charts and tables update immediately to reflect the data from opportunities that meet the selected criteria. You can apply additional filters as needed.

Insights

In this worksheet, you can learn more about the data that appears in the Forecast This Month worksheet. You can see different types of data, and filter the data not only to show the opportunities forecast to close in the current month, but to isolate types of revenue, teams, and individual representatives.

You can also look at trends in future forecast revenue, and compare future forecasts to this month and to closed opportunities. How is your revenue trending compared to the current month and previous months? If you can see potential problems here, you can take steps to address them.

Using the Tables

Three tables appear on this worksheet. You can click the down arrow in any column to specify sort or search by options.

Top 10 Opportunities for MRR and One-Time Revenue

Top 10 MRR Opportunities and **Top 10 One-Time Opportunities** display the ten opportunities, for the specified revenue type, that show the highest revenue forecast after filters are applied.

Top 10 MRR Opportunities

Opp ID	Account	Year	Month	Sale Rep	Monthly
33066358	M & T Bank	2013	Jun	Jim	$531
35707280	Open Systems Sc	2013	Jun	Jim	$313
34878849	Open Systems Sc	2013	Jun	Fred	$310
35700403	Quaker Therapy	2013	Jun	Colin	$250
35407108	Quality Carpets	2013	Jun	Colin	$212
35387472	Communication :	2013	Jun	Colin	$203
35569265	Riverbed System	2013	Jun	Colin	$198
34594443	Hawk Famous Ea	2013	Jun	Diane	$182
33786985	Lumber Tech 2	2013	Jun	Diane	$181
35761978	J&L Foods	2013	Jun	Diane	$181

Columns include Opp(Opportunity) ID, Account, Year, Month, Sales Representative, and Monthly (revenue). To open the opportunity detail, locate the opportunity in the table that appears below all the charts. See All Deals, below.

All Opportunities

A single table located at the bottom of the worksheet displays all opportunities (deals) that meet the search criteria specified for the worksheet. The table content changes as you apply filters. The Opportunities metric at the top of the worksheet indicates the total number of opportunities listed. This table includes the following columns: Opportunity ID, Account, Opportunity Name, Monthly Revenue, One-Time Revenue, Stage, Status, Create Date, Projected Close Date, Probability, Sales Representative, Last Activity, Advanced fields 1 through 5, and Country.

Double-click the ID column to open the opportunity detail in Autotask. If you are not logged into Autotask, enter login credentials when prompted. Autotask security level permissions apply.

Using the Charts

The fifteen charts display active deals and forecasted revenue by multiple criteria including month of projected close, group, revenue distribution, probability, stage, and resources. There are five pairs of charts (total of ten charts) where both charts display the same data, but one chart displays the data for Monthly (MRR) opportunities and the other chart displays the data for One Time opportunities.

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

In the following examples, when a chart has both a Monthly and a One-Time version, the images use the monthly (MRR) version. The X and Y axis will represent the same data but, in most cases, the Y axis tick-marks will have different values.

Revenue and Opportunities (Grouped by Projected Month of Close)

Y Axis = Amount of revenue
X Axis = Month and year
Columns = Revenue forecast to close in month indicated
Gray line = Count of deals (opportunities) forecast to close in month indicated

The worksheet also includes a chart for One Time Opportunities.

For each month displayed along the X axis, view the number of opportunities expected to close (line) and the amount of revenue anticipated from those opportunities (columns).

Revenue by Group (Team)
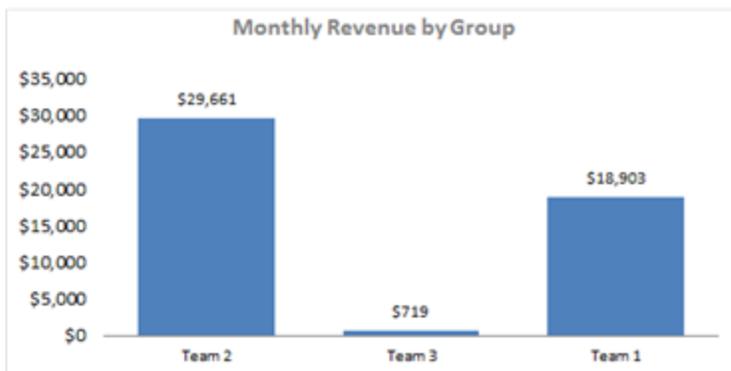
Y Axis = Amount of revenue
X Axis = Groups (Teams)
Columns = Revenue anticipated from opportunities that meet the filtering criteria

The worksheet also includes a chart for One Time Opportunities.

View the revenue forecasted to close by the specified team (group) for the specified month. Filter by multiple teams to compare forecasts, or filter teams by specified resource.

Probability Distribution

Each sector represents the percentage of the total opportunities in the filtered data that have the specified probability of closing: Blue = probability 0 to 25%, Red = probability 26 to 50%, Green = probability 51 to 75%, Purple = probability > 75%

The number in each sector = the number of opportunities that fall within that probability distribution. Place the cursor in a sector to open a tool tip that indicates the exact percentage.

Sales Funnel
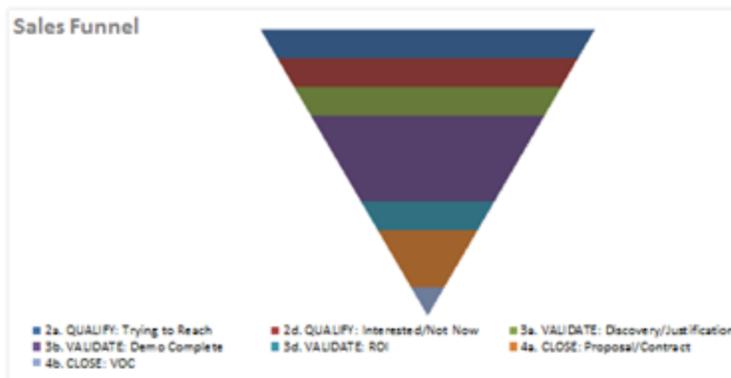
Each color represents an opportunity stage and the number of opportunities in that stage. Stages appear in ascending order; the final stage is at the bottom of the "funnel".

Color assignments are described in the legend below the funnel.

View the distribution of opportunities in your pipeline by stage to see if there is a steady flow of projected opportunities.
If all opportunities in the pipeline are at or near close, there will be a downward trend in revenue during the time it takes to open new opportunities and bring them to close. If the opportunities are weighted to the earlier stages, then revenue may dip while those opportunities are being brought to close.

Revenue Distribution

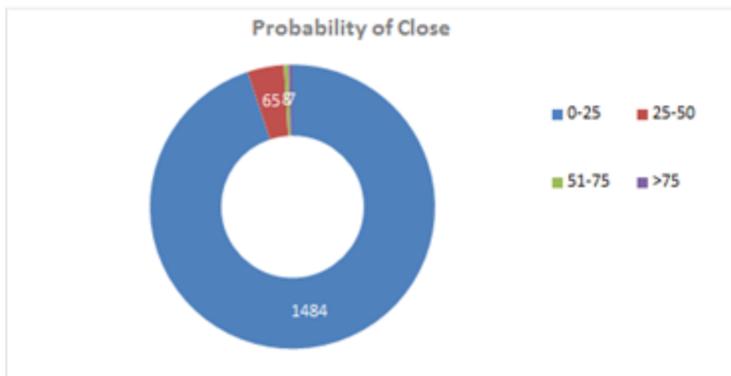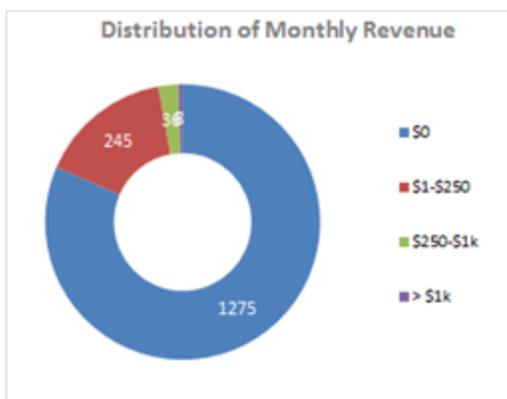Each sector represents the number and percentage of opportunities in the filtered data with revenue forecasts that fall within the distribution indicated by color.

The legend on the right describes the color assignments.
The worksheet also includes a chart for One Time revenue.

The amount represented by each color is specific to your company and may vary between the Monthly and One Time revenue charts.

The number value = the number of opportunities in the total sample with forecast revenue that falls within the specified range. You can place you cursor in a sector to see additional details.

Compare the distribution of revenue anticipated from forecast opportunities.

Last Activity
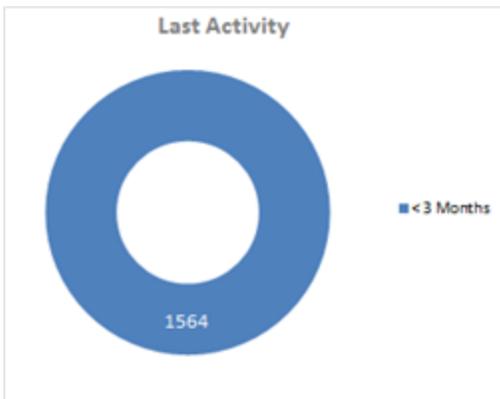
Each sector represents the percentage of the total forecasted revenue where the last activity date falls within the specified timeframe.

The legend on the right describes the color assignments.

View the percentage of opportunities from the filtered data that have experienced activity within the specified timeframe.

Opportunities by Stage
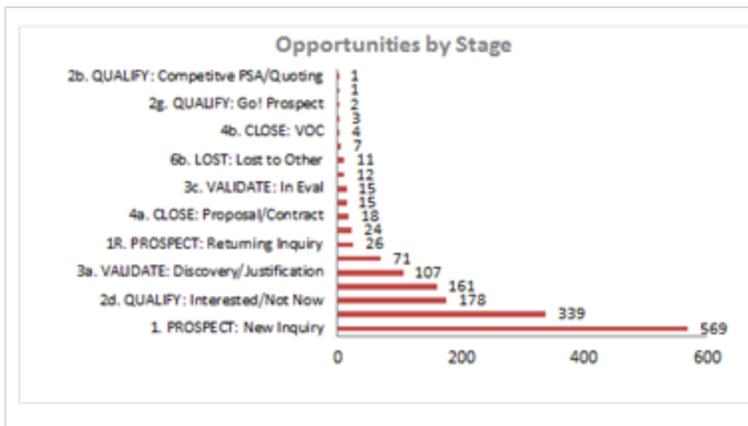
Y Axis = Opportunity Stages as defined in your Autotask
X Axis = Number of Opportunities
Bars = Opportunities from the filtered data that are currently in the stage indicated
The number at the end of the bar indicates the exact count.

View and compare how many opportunities from the filtered data fall into the different stages.

Opportunities by Resources
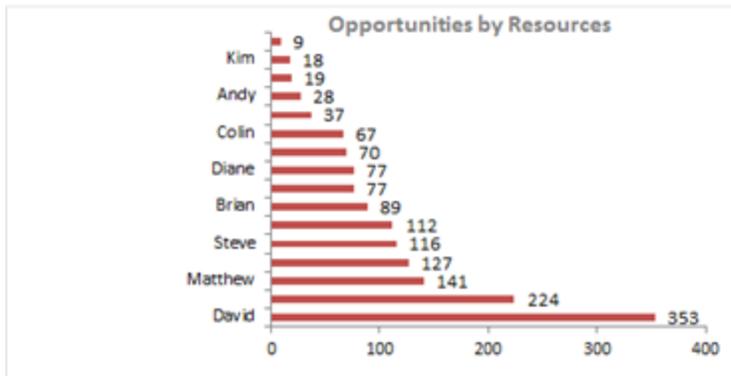
Y Axis = Sales representatives
X Axis = Number of Opportunities
Bars = Opportunities from the filtered data that are owned by the representative indicated

Each bar indicates a sales representative. If there is not enough room to display a name next to each bar, point the cursor at any bar to view the name of the representative associated with that bar.

Each bar indicates a sales representative. If there is not enough room to display a name next to each bar, point the cursor at any bar to view the name of the representative associated with that bar.

View and compare how many forecasted opportunities from the filtered data are owned by each of your sales resources.

Opportunities by Amount of Revenue and Create Date
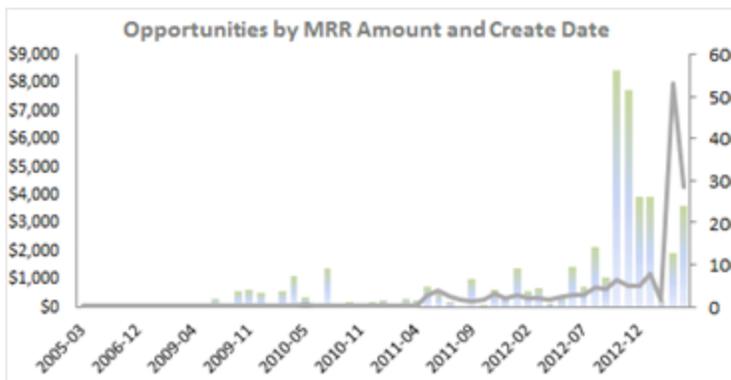
Y Axis = Amount of revenue
X Axis = Create Dates
Secondary value axis = number of opportunities
Columns = Anticipated revenue from opportunities created in a specified month
Line = Number of opportunities created on specified date

Each column represents a month. If there is not enough room to display a label for each column, point the cursor at any column to view the date and value.

The worksheet also includes a chart for One Time Opportunities.

View and compare the amount of revenue you expect to realize from opportunities that meet the search criteria. view create dates, and compare the number of opportunities created in the different months indicated on the X axis.

Projected Opportunities by Amount of Revenue and Close Date

Projected Opportunities by MRR Amount and Close Date
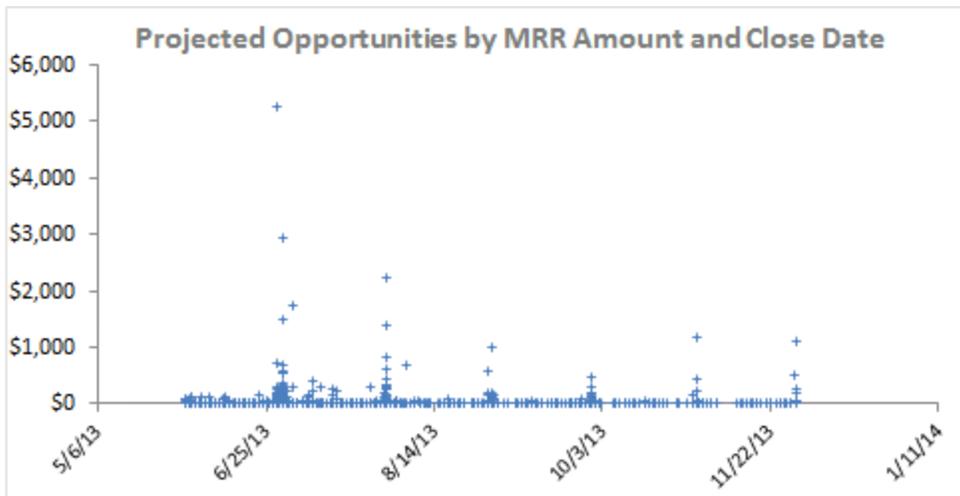
Y Axis = Amount of revenue
X Axis = Close Dates
Data markers = Opportunities that meet the filter criteria positioned by anticipated revenue amount and projected close date

The worksheet also includes a chart for One Time Opportunities.

View the individual opportunities that meet the filter criteria, as they compare to each other in terms of size (amount of revenue) and projected close date.

Sales Plan and Analysis - Current and Previous Fiscal Year

In workbooks earlier than version 1.2, the tabs described here are labeled SalesPlan[yy] and SalesPlan Previous Year.

The final worksheets in the Sales Workbook are the Current FY (Fiscal Year) and Previous FY (Fiscal Year) tabs. On these worksheets you can view the raw numbers for all Opportunities **closed** in the current or previous fiscal year. Data is presented by Year to Date, Quarter, and Month. Sparkline graphs highlight Monthly and Quarterly Trends.

Metrics that Matter - Current Year Only

Metrics that Matter	Met Plan	Month Trend	QTR Trend	YTD	Q1	Q2	Q3
Opportunities Closed (MRR)				145,441	135,047	10,394	-
Opp Closed (One-Time)				404,513	375,901	28,612	-
Managed Services				79,569	64,527	15,042	-
Compliance				213,777	194,760	19,017	-
Product				4,189	3,903	286	-
Professional Services				17,937	16,569	1,368	-
Other				267,737	247,515	20,222	-
MRR Average				495	406	89	-
One-Time Average				4,439	3,706	734	-
Average Age to Close (MRR)				194	140	54	-
Average Age to Close (One-time)				388	300	87	-

The first lines of data on the Current FY tab bring together 11 essential sales metrics:

- Number of Monthly (MRR) revenue opportunities closed and the number of One-Time revenue opportunities closed

- Total revenue from opportunities closed for each of the five Fee Types

Fee types are specified in Autotask in the opportunity Advanced fields.

- Average revenue for Monthly (MRR) opportunities closed and average revenue for One-Time opportunities closed

- Average age to close, that is, average count of months required to close opportunities, for both Monthly (MRR) revenue and One-Time revenue opportunities.

These metrics pull this selected data from the worksheet data in order to provide a quick look at these important points.

Metrics that Matter do not appear on the Previous FY tab.

Additional Data

The additional data in this worksheet groups revenue from closed opportunities by specific criteria including Fee Type, revenue range for each revenue type, distribution of Age to Close, team (group) for each revenue type, and by resource (sales representative) for each revenue type.

Each row displays the totals for year to date, each quarter, and each month of the year. In addition, each line includes cells where you can enter your sales plan goals. You can set goals for as many or as few rows as you choose. Refer to Sales Plan Data, below.

To the right of the sales Plan columns, the worksheet displays the monthly variance (Var) between your sales plan and actual revenue. Parentheses indicate the amount by which revenue fell below the plan goal.

The sparkline graphs that follow the row labels provide a quick assessment of when monthly goals have been met, and what the overall trend has been by month and by quarter. Sparklines only appear in the Met Plan column when you have entered plan goals.

> Many of the cells in this worksheet are automatically calculated using pre-set formulas. Do not edit pre-calculated cells unless you intend to modify a calculation and you know how to work with formulas in Excel.

Sale Plan and Goals Data

You can set sales goals in the Current F Y tab and then see actual data compared to these goals directly in the worksheet. The Sales Plan data entered here also provides the data for the Plan lines in selected charts.

There are Plan columns for all metrics. You can set goals for whatever metrics you want.

> Before you edit the workbook, always save a backup copy.

To provide data for the Plan lines on the **Trending - Year to Date** worksheet, enter monthly revenue goals for One-Time and Monthly (MRR) revenue and for each Fee Type (Advanced Fields). For version 1.2 and higher workbooks, Plan data that you enter in the lines Opp Closed (Total Revenue) and Opp Closed (Total Cost) will appear in the charts under "Total Revenue and Cost Trends versus Plan". Gross margin, which also appears in these charts, is automatically calculated in the Current FY tab based on the Total Revenue and Total Cost data.

How to...

Set Plan Goals

1. Save a backup copy of your workbook.

2. In your workbook, click the **Current FY** tab.

3. In the worksheet, scroll **to the right** to find the column labeled **Jan Plan**. It should be column AB, or close to it (the Sales Plan worksheets can vary slightly between workbooks).

   To the right of Jan Plan there is a column for each additional month of the year.

Metrics that Matter	O	N	D	Total	Jan Plan	Feb Plan
Opportunities Closed (MRR)	-	-	-	145,441	30143	
Opp Closed (One-Time)	-	-	-	404,513		
Managed Services	-	-	-	79,569		

4. Scroll **down** to the row for the first set of values you want to enter:

   Opportunities Closed (MRR) will hold the values for your total monthly recurring revenue goals.

   Opp Closed (One Time) will hold your one time revenue goals.

   The Fee Type rows appear under the row labeled **BY FEE TYPE**. Fee type names are specific to your company.

   Opps Closed (Total Revenue) will hold the values for your total revenue goals.

   Opps Closed (Total Cost) will hold the values for your projected total costs for opportunities closed.

   Opp Closed (Gross Margin) displays the calculated values for gross margin, based on the values you entered for Total Revenue and Total Cost. If you manually enter values in this row, you will remove the formula.

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5. Find the **cell** where the **Jan Plan** column intersects with the row to which you want to add plan values, for example, Opportunities Closed (MRR).

6. Click in the cell and enter the value of your **January goal** for the data type indicated by the row label.

7. Move to the next Month Plan column and enter the value for that month. Repeat for **each month**. You can copy and paste where different months have identical values.

   You can click the Trend tab at any time to view the Plan Lines on the charts.

   ---

8. **Save** the workbook.

9. **Repeat** Steps 3 through 7 for each additional row to which you want to add revenue goal values (refer to Step 3 for the rows that provide data to charts).

Using the Financial Workbook

How much time do you spend monitoring the financial health of your business? More than you want to? Not enough? Or maybe both?

And, are you looking at the right data? Do you know how to find the data you should be monitoring? And what do the numbers really mean?

The answers to these questions are as varied as the IT Service Providers that use Autotask to manage their businesses. But, there is one question that has only one right answer. Should you be monitoring your business financial data? The answer is always yes, regardless of how well you think your business is doing.

But sifting through reports and spreadsheets can be tedious and time consuming. And when you find the data you need, how do you get the most from it?

That's why the Autotask Financials workbook takes this:

	A	YTD	2012-01	2012-02	2012-03	2012-04	2012-05	2012-06	2012-07	2012-08	2012-09	2012-10	2012-11	2012-12
2	**Profit & Loss**													
3	REVENUE													
4	Recurring Service	1,443,336	14,101	117,264	259,310	1,628	132,705	143,131	117,588	125,537	247,966	5,572	135,981	142,553
5	Time & Materials	1,978	130	101	-	259	-	-	1,488	-	-	-	-	-
6	Fixed Price	607,715	20,395	53,963	67,413	48,978	29,815	40,365	30,826	59,644	35,064	95,231	9,960	116,062
7	No Contract	155,727	2,501	47,859	8,620	19,337	5,997	12,916	10,136	11,559	12,952	9,913	7,875	6,061
8	Additional Revenue 1	-												
9	TOTAL REVENUE	2,208,755	37,127	219,186	335,343	70,202	168,518	196,411	160,038	196,741	295,982	110,716	153,815	264,675
10	COST OF GOODS SOLD													
11	Recurring Service	816,677	79,547	73,467	6,545	127,425	49,211	96,218	64,905	20,370	112,910	7,658	121,563	56,857
12	Time & Materials	1,822	101	142	-	385	-	310	884	-	-	-	-	-
13	Fixed Price	413,115	17,199	42,345	49,246	39,961	20,263	27,804	18,863	31,941	37,137	37,763	21,120	69,474
14	No Contract	86,048	8,467	9,046	4,545	11,869	11,254	5,636	3,877	7,889	12,066	1,838	7,258	2,305
15	COGS (Calc from Reg Hours)	-	-	-	-	-	-	-	-	-	-	-	-	-
16	Other Cost of Sales 1	-												
17	TOTAL COST OF GOODS SC	1,317,662	105,315	124,999	60,336	179,640	80,728	129,968	88,529	60,200	162,113	47,258	149,941	128,635
18	GROSS PROFIT	891,093	(68,188)	94,187	275,008	(109,438)	87,790	66,443	71,509	136,541	133,869	63,458	3,875	136,040
19	GROSS MARGIN %	40%	-184%	43%	82%	-156%	52%	34%	45%	69%	45%	57%	3%	51%
20	OPERATING EXPENSES													
21	OpEx (Calc from Reg Hours)	353,409	12,213	12,574	21,752	32,354	32,761	30,129	37,638	35,855	32,630	42,053	32,423	31,027
22	Other Operating Expenses 1	-												
23	TOTAL OPERATING EXPENS	353,409	12,213	12,574	21,752	32,354	32,761	30,129	37,638	35,855	32,630	42,053	32,423	31,027
24	EBITDA	537,684	(80,401)	81,613	253,256	(141,792)	55,029	36,313	33,871	100,686	101,239	21,405	(28,548)	105,014
25	Revenue Analysis													
26	BY COUNT													
27	Number of Clients Invoiced	795	60	65	63	64	65	70	66	71	70	61	70	70
28	Average Revenue Per Clien	2,778	619	3,372	5,323	1,097	2,593	2,806	2,425	2,771	4,228	1,815	2,197	3,781

and turns it into dashboards like these:

Autotask Professional Services Automation

FINANCIAL GAUGES

		Select Month:	2013-04

Month: 2013-04
Revenue: 198,480
Cost of Goods: 134,140
Gross Margin: 64,340 (32%)

Revenue

Revenue

117%

Actual	198,480
Plan	170,000

Red	Low	50%
Yellow	Low	75%
Green	Low	100%
Chart	High	125%

Revenue

Recurring Service Rev
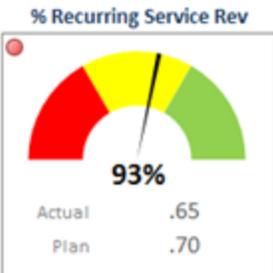
107%

Actual	128,894
Plan	120,000

Red	Low	50%
Yellow	Low	75%
Green	Low	100%
Chart	High	125%

Recurring Service Rev

% Recurring Service Rev

93%

Actual	.65
Plan	.70

Red	Low	50%
Yellow	Low	75%
Green	Low	100%
Chart	High	125%

% Recurring Service Rev

Cost of Goods Sold

134%

Actual	134,140
Plan	100,000

Red	Low	100%
Yellow	Low	75%
Green	Low	50%
Chart	High	125%

Cost of Goods Sold
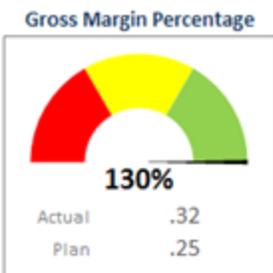
Gross Margin

129%

Actual	64,340
Plan	50,000

Red	Low	50%
Yellow	Low	75%
Green	Low	100%
Chart	High	125%

Gross Margin

Gross Margin Percentage

130%

Actual	.32
Plan	.25

Red	Low	50%
Yellow	Low	75%
Green	Low	100%
Chart	High	125%

Gross Margin Percentage

Operating Expenses

97%

Actual	34,014
Plan	35,000

Red	Low	100%
Yellow	Low	75%
Green	Low	50%
Chart	High	125%

Operating Expenses

EBITDA

15%

Actual	30,326
Plan	200,000

Red	Low	50%
Yellow	Low	75%
Green	Low	100%
Chart	High	125%

EBITDA
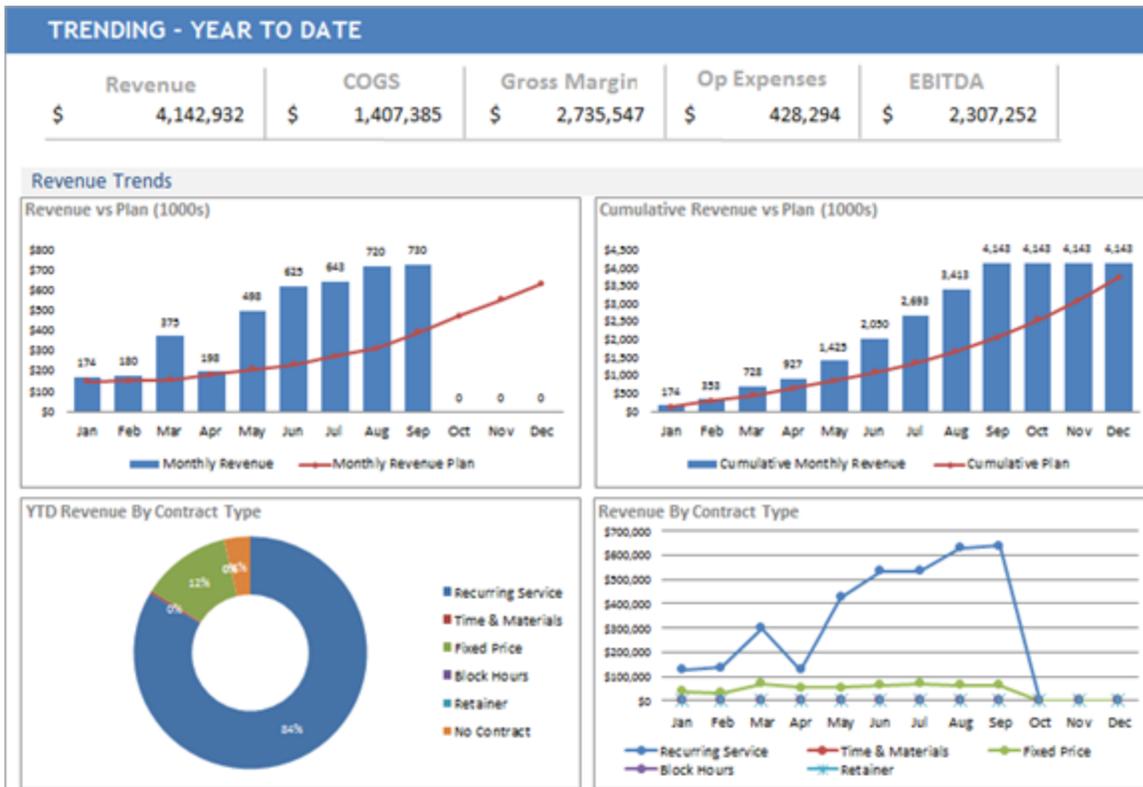
Key metrics are pulled out of your Autotask database and grouped for quick analysis. The data can be updated daily from your Autotask database in about a minute.

Six workbook tabs display a range of financial data in gauges and charts that provide a quick assessment of, and help to gain insight into, revenue trends, costs and margin, and time and resource utilization. You can set plan goals for revenue and for billable resource hours and then compare those goals against actual revenue and hours in the workbook charts.

Metrics that Matter

The Metrics worksheet tab includes up to 14 key metrics. Out of the box, you'll see thirteen metrics selected to provide an overview of your business's financial pulse. Get a quick assessment, by selected month, of overall revenue compared to cost of goods sold and gross margin. See how many clients are generating revenue and how many are costing you money, and how much.

Refer to "Viewing Key Financial Metrics" on page 127.

Worksheet Tabs

Gauges

On the Gauges tab, when you select a month from the menu or the revenue indicator line, key metrics at the top of the page immediately update to display your company's activity for the selected month. Below the general metrics, color coded gauges for up to 20 metrics give you a quick visual indicator, by percentage, of how your company performed compared to your business plan. You can select from 26 different metrics to display. For each gauge, you can adjust the ranges to meet your business needs.

Refer to "Financial Gauges" on page 129.

Financial Trends

Sometimes you need to look at the big picture and see how each month fits into the overall trends for the fiscal year. The Financial Trends tab provides 22 charts that break out key metrics for year to date. Metrics include trends for revenue, cost of goods, and margin. They compare those trends to plan targets, and they break out data by account, revenue type, and contract type.

Refer to "Financial Trending - Year to Date" on page 132.

Year Over Year Trends

Regardless of what is happening in the current year, to get the best handle on how your business is doing you should know how the current year compares to the previous year. The charts on the Year Over Year tab take 13 key metric trends and compare them to the previous year. You can use these charts to see if you're making progress towards your long term goals, especially if you are trying to move towards higher revenue clients, or a recurring service model. You can also learn if you're addressing issues you've experienced in the past, or developing negative trends that you did not experience in the previous year.

Refer to "Financial Trending: Year Over Year" on page 142.

Explore - General Financial Data

When you see the trends in your business, you get an idea of where things are going well and where you might need to make some changes. Now you need to find out the details of what is driving the bigger picture. On the Explore tab you can filter the metrics in the 16 charts to drill down to specifics by quarter, month, contract type, revenue category, billing type, client, and even individual contract.

Refer to "Explore General Financial Data" on page 149.

Utilization

In most businesses, the largest percentage of the operating budget comes from labor costs. On the Utilization tab you can explore details of your labor costs. The 6 charts break out hours worked by metrics like month, type of time, billable type, and resource. You can drill down to details with 6 filters: year, month, individual resource, type of time, and work type.

Refer to "Resource Utilization" on page 157.

Margin

Gross margin, that is, revenue minus cost of goods sold, is a critical indicator of business health. The Margin tab scatter chart presents an overall view of the relationship between your business revenue and gross margin percentage, including where your gross margin percentage fell into the negative range. You can filter the chart data by quarter, month, contract type, contract category, and account.

Refer to "Explore Margin" on page 160.

Financials Current and Financials Previous

These two worksheets store the data from the current and previous years that appear in the workbook charts and tables. Data is presented in a spreadsheet, grouped and sorted to correspond to the visual presentations. These spreadsheets are formatted so the data is easy to read. Sparklines provide a quick visual key to trends over time.

On the Financials Current worksheet, you add the values for your company's Plan targets. You can also manually enter data for additional revenue sources, costs of goods sold, and operating expenses that are not included in your Autotask data.

Refer to "Financial Analysis: Current and Previous Fiscal Year" on page 162.

Labor Current and Labor Previous

These two worksheets store the labor data from the current and previous year that appears in the workbook charts and tables. Data is presented as a spreadsheet, grouped and sorted into Labor Summary and Labor Details data. These spreadsheets are formatted so the data is easy to read.

Labor Summary data includes totals for service versus indirect labor, and labor totals by tasks and tickets. Labor Details present data for individual resources including metrics like service and indirect hours, service hours as the percent of total, and burden rate per hour. Sparklines provide a quick visual key to trends over time. This worksheet is also where you enter your Plan target resource hours by month.

Refer to "Labor Summary and Details: Current and Previous Years" on page 165.

Viewing Key Financial Metrics

The Metrics worksheet tab displays data in a table format that includes indicator icons and sparklines to provide a quick assessment of your financial metrics that matter.

Copyright 2013 Autotask Corporation

- **Select a month** from the menu in the upper right corner to immediately view data for the selected month.

When you receive the workbook, the table displays the following 13 preselected metrics:

Metric	Description
Metrics reflect the month specified in the Select Month field.	
Revenue	Total revenue
Recurring Service Revenue	Revenue from recurring services
% Recurring Service Revenue	The percent of total revenue generated by recurring services
Cost of Goods Sold	Total cost of goods sold
Gross Margin	Total revenue minus the total cost of goods sold
Gross Margin percentage	Total gross margin divided by total revenue
Operating Expenses	Total operating expense from indirect labor and Other operating expenses. In the Labor Current worksheet, you can manually enter Other Operating Expenses that are not stored in the Autotask database.
EBITDA	Earnings Before Interest, Taxes, Depreciation, and Amortization
Average Revenue per Client	Total Revenue divided by number of clients invoiced

Metric	Description
Accounts with over 10,000*	Number of accounts that generated over 10,000 in revenue
Revenue from Over 10,000*	Total amount of revenue coming from accounts that generated over 10,000
% of Revenue from Over 10,000*	Percent of total revenue that comes from accounts that generated over 10,000
Accounts margin Lost Money	Number of accounts that lost money based on Gross Margin

* You can adjust this amount to suit your company's revenue. Refer to "Customizing Your Data Display" on page 13.

Metrics reflect the month specified in the Select Month field. Year to date metrics reflect all revenue from the beginning of the current Fiscal Year through the specified month.

The table below describes the data displayed for each metric.

Display Feature		Description
Select Month: 2013-07	Select Month	This menu appears above the Metrics table to the right. Select a month to display the metrics for that month.
	Actual totals versus Target	The total amount for the for the selected month and the target value set for the metric
	Year To Date Actual totals versus Target	The year to date total, through the selected month, for the specified metric and the target year to date value (sum of year to date target values for current and preceding months
🔴	Red dot indicator	Flags metrics that do not meet the specified target
⬆️⬇️	Change between the current and previous month, with green or red arrows	The current month total minus the previous month's total. Green and red arrows indicate whether the change is downward or upward. The value of the difference between the two months appears to the right of the arrows.
	Sparkline graphs	Two small graphs display data for all months. One shows trends from month to month and the other shows which months met the planned target.

Financial Gauges

On this worksheet, color coded gauges give you a quick visual indicator, by percentage, of how your company performed compared to your business plan. You can display up to twenty of the twenty six available metrics, and easily change your selection at any time.

Key Metrics

Three key metrics: Revenue, Cost of Goods, and Gross Margin (revenue minus cost of goods) are displayed at the top of the Gauges worksheet. These metrics are drawn from the month indicated above the metrics. When you change the month, the key metrics and gauges update immediately.
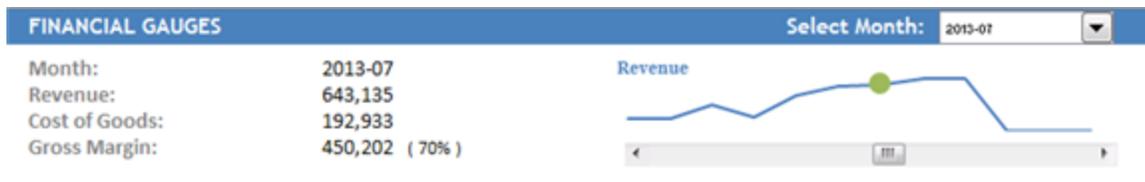
Change the Display Month

There are two methods to change which month's data appears on this worksheet.

- Select a month from the Select Month menu in the upper right corner of the worksheet.

- Move the green dot on the Revenue line below the Select Month field.

  To move the green dot to a new location, click and drag the scroll bar beneath the revenue line, or click the directional arrows at either end of the scroll bar. When you move the dot, the month in the Select Month field updates automatically.
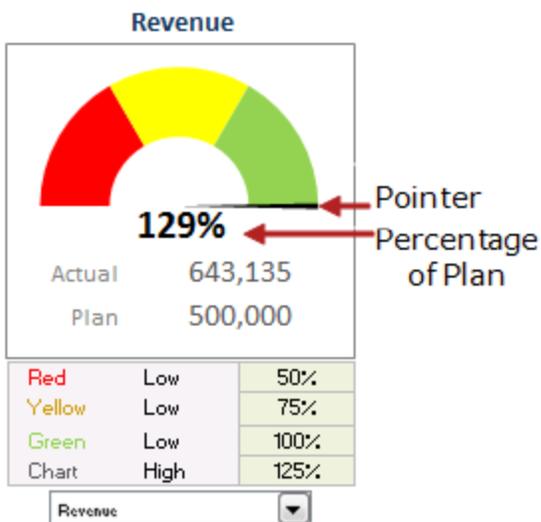
Viewing the Gauges

Each gauge represents a different metric and has three, color coded segments. Each segment represents a different percentage range. The color of the segment represents the status of that range.

For metrics where you want to exceed your Plan target, the highest range is the most desirable and it is green.

- Red (low end) - the plan was not met and the total is cause for concern.

- Yellow (in between) - the total did not meet the plan, but came within an acceptable range

- Green (high end) - the total met or exceeded the plan

For some metrics, for example, Cost of Goods Sold, your goal will be to keep your total at or below plan. In that case the highest range is the least desirable range and appears as red.

- Green (low end) - the total was well below the plan target

- Yellow (in between) - costs did not exceed the plan, but came very close or met plan

- Red (high end) - total costs exceeded the plan target

Adjusting the Gauge Settings

You can change which of the 26 available metrics displays in any gauge.

- Select a new metric from the menu below the gauge.

If you do not use a particular metric, or do not have data to drive the metric, select "Unselected". This will zero out the gauge.

To meet your business preferences, you can also modify the range for the gauge segments, for example, you may want to set your yellow range at 90 to 100% instead of the default 75 to 100%. You can also set the maximum percentage to be displayed on the gauge.

1. Below the gauge, locate the Low setting for the Red, Yellow, or Green range, or the Chart High setting.

2. Double click in the cell with the current % value and change the value, or

   Click in the cell and edit the value in the Formula Bar.

3. Click Enter. Save the worksheet.

Financial Trending - Year to Date

In addition to looking at your metrics on a month to month basis, you will want to see how each month fits into the overall trends for the fiscal year. The Financial Trends tab provides twenty-two charts that break out key metrics for year to date. Charts are grouped by Revenue Trends, Cost of Goods Sold, and Gross Margin. In each section, the basic metric trends are presented year to date, by month. Some charts compare the actual data to Plan targets. Other charts present the actual data by account, revenue type, or contract type.

Key Metrics

Five key metrics, calculated year to date, are displayed across the top of the worksheet: Revenue, COGS (Cost of Goods Sold), Gross Margin, Op Expenses (Operating Expenses), EBITA (Earnings before interest, taxes, and amortization)

Revenue Trends

These nine charts look at revenue totals to show how your revenue compares to your business plan, and how it is distributed between clients and contract types.

Revenue versus Plan

Y Axis = Revenue (1000s)
X Axis = Months
Columns = Actual monthly revenue
Red line = Monthly revenue Plan targets

View posted revenue for each month compared to monthly revenue Plan targets.

Has your revenue trended mostly close to, or above plan values so far this year? Did you see growth in revenue overall?

Cumulative Revenue versus Plan

Y Axis = Revenue (1000s)
X Axis = Months
Columns =Cumulative monthly revenue
Red line = Cumulative monthly revenue Plan

View posted revenue for each month, cumulative from month to month, compared to cumulative values of monthly revenue Plan targets.

Some months will have revenue perform very well against plan while other months might fall short. What is often most important is the cumulative performance year to date.

YTD Revenue by Contract Type
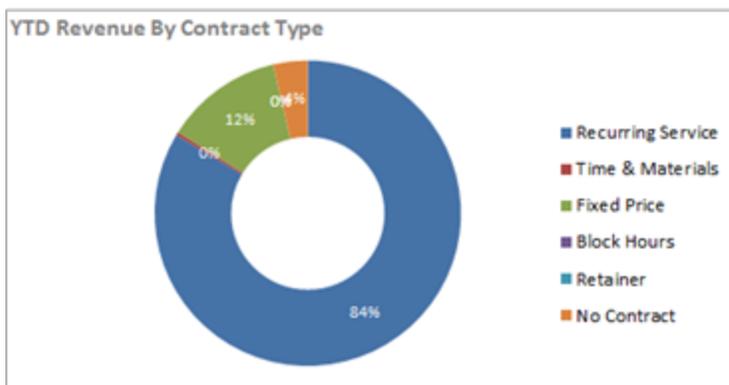
Each color coded segment represents the percentage of total revenue generated by the corresponding contract type.
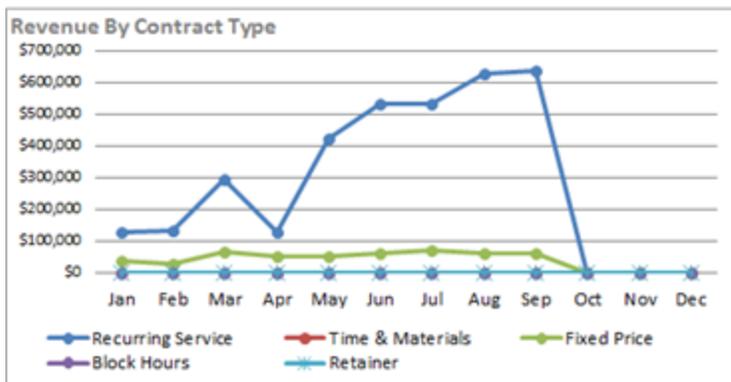See the legend on your chart to determine the color to contract type association.
The actual percentage value for a segment appears in white text in that segment.
Hover over a segment in the worksheet to display details.

Compare the amount of revenue generated by different contract types.

All revenue is not created equal. The revenue by contract type tells you what types of contracts are generating the most revenue.

Revenue by Contract Type
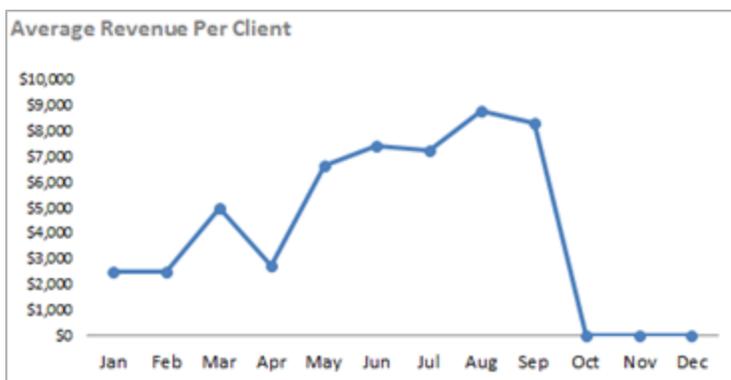

Y Axis = Revenue
X Axis = Months
Lines =Each color coded line represents a contract type. See the legend on your chart to determine the color to contract type association.

View revenue by contract type on a month to month basis and as a year to date trend.
Compare revenue generated from different contract types.

How is the revenue from each contract type trending over the months? Compare this chart to Gross Margin by Contract Type to see if the higher revenue contract types are actually delivering more profit.

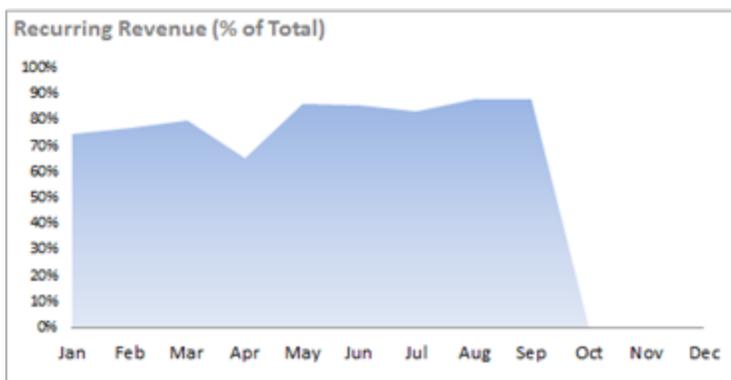## Average Revenue per Client

Y Axis = Revenue
X Axis = Months
Line = Average revenue per client

Average revenue per client = total revenue generated for the month divided by the number of clients billed that month.

If your average revenue per client trends upward, it is a good sign that you are bringing on larger clients.

Recurring Revenue as a % of Plan


Y Axis = Percent of Revenue
X Axis = Months
Shaded area = percent of total revenue for the month that was generated by recurring service contracts.

Follow the percent of your revenue that is generated by recurring service contract.

Recurring revenue represents an ongoing, reliable source of revenue. Follow that trend of recurring revenue as a percent of total revenue.

Revenue Distribution by Clients
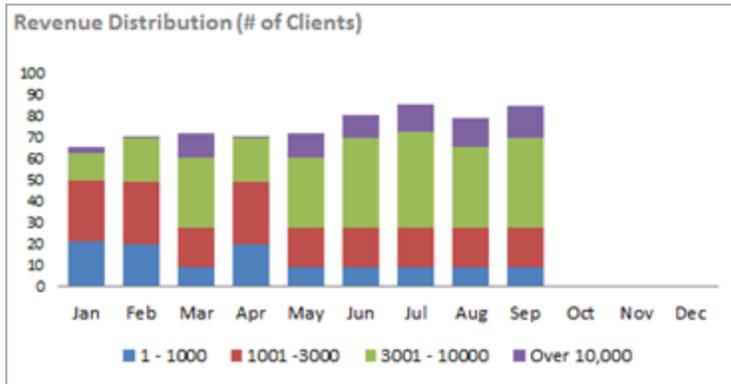
Y Axis =Number of clients
X Axis = Months
Columns =Total number of clients generating revenue for the month indicated.
Color coded column segments = the number of clients that, during the indicated month, generated revenue falling within the ranges indicated in the chart legend.

For example, in this chart, Blue (bottom segment) = revenue from 1- 1000, Red (second from bottom) = 1001 - 3000, Green (third from bottom) = 3001 - 10000, and Purple (top segment) = revenue over 10,000
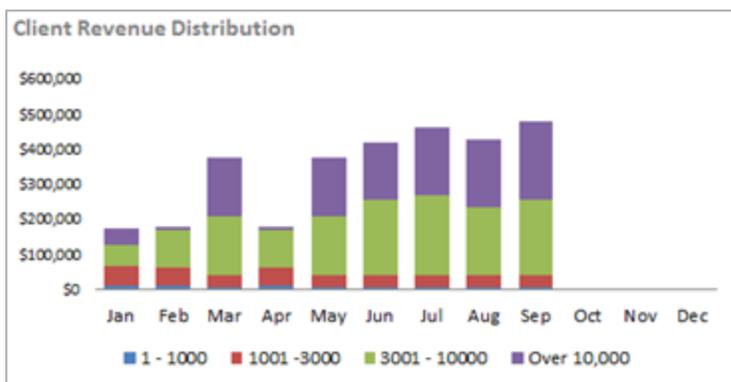
In your workbook, hover over a segment to view details.

It's useful to understand the number of clients who are generating revenue in specific ranges. Does most of your client base provide revenue in the lowest range?

You can change the chart ranges to suit your company's revenue. Refer to **"Customizing Your Data Display" on page 13**.

Client Revenue Distribution

Y Axis =Revenue
X Axis = Months
Columns =Total revenue for the month indicated.
Color coded column segments = the amount of revenue generated by clients that generated revenue within the range indicated by the segment color. In your workbook, hover over a segment to view details.

For example, in this chart, Purple (top segment) = revenue over 10,000

In May, clients generating over 10,000 (purple) were responsible for generating over 163,000 in revenue.

It's more important to understand the amount of revenue that your large clients are generating. Often, there may not be as many but they will represent a significant portion of revenue. For example, in this chart in May, clients generating over 10,000 in revenue were responsible for generating 163,000 in total revenue. If you look at the previous chart, Revenue Distribution by Clients, you can see that there were 11 clients that generated over 10,000 in May, for an average of over 14,000 per client.

Year to Date Top Accounts by Revenue
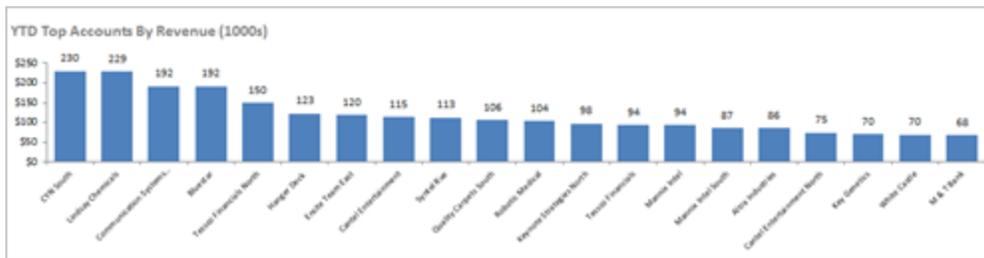
Y Axis = Revenue
X Axis = 15 accounts generating the most revenue year to date
Blue column = Amount of revenue generated by the account indicated

View the 15 clients that have generated the most revenue so far **this calendar year**.

This chart will always use Jan-Dec data, regardless of the fiscal year settings.

Which of your clients have generated the most revenue in the current calendar year?

Cost of Goods Sold Trends

These four charts look at the costs directly involved with providing service to your clients including labor and direct costs for projects or tickets. You need to manage these costs to improve your gross margin on the revenue tracked in the Revenue Trends.

Cost of Goods Sold versus Plan
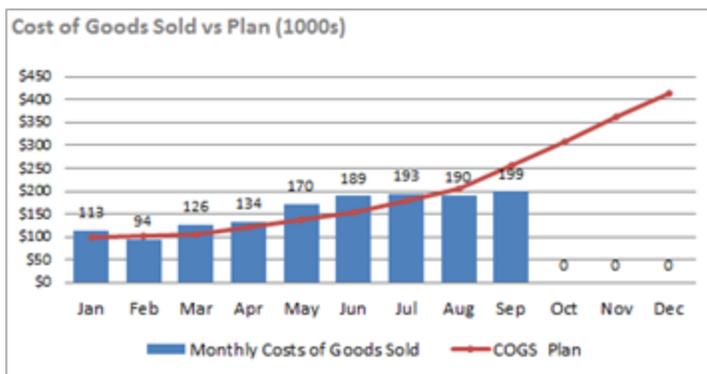
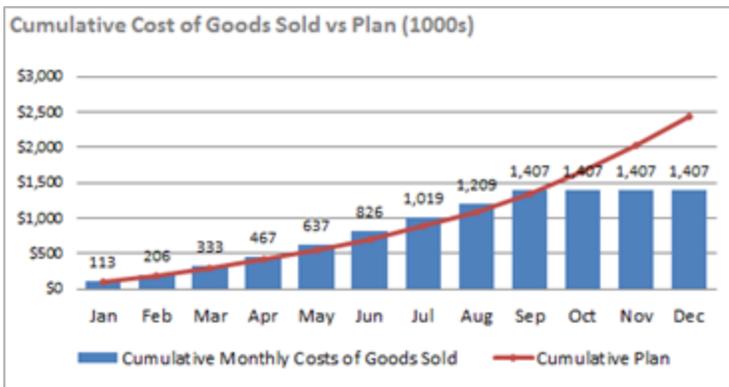Y Axis = Costs (1000s)
X Axis = Months
Columns = Total costs per month
Red line = Monthly cost Plan targets

View how your monthly costs compare to your plan, and follow cost trends from month to month.

How much is it costing you to provide the services that you are billing for? Here you see the cost of goods sold versus your plan targets. Are costs trending up, down, or remaining relatively stable?

Cumulative Cost of Goods Sold versus Plan (1000s)


Y Axis = Costs (1000s)
X Axis = Months
Columns = Total costs, cumulative from month to month
Red line = Cumulative monthly cost Plan targets

View the cumulative trend in your monthly costs and how that trend compares to your plan, and follow cost trends from month to month.

Some months will have costs below plan while costs may be high in others. What is often most important is how well your cost of goods is performing cumulatively year to date.

Year to Date Cost of Goods by Contract Type
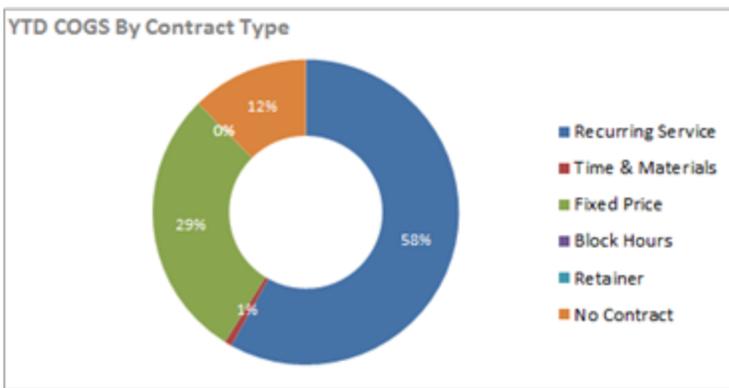
Each color coded segment represents the percentage of total cost of goods associated with the corresponding contract type. See the legend on your chart to determine the color to contract type association.
The actual percentage value for a segment appears in white text in that segment.

In your workbook, hover over a segment in the chart to display details.

Compare how much different contract types cost you so far this year.

Do some contract types consistently generate higher costs?

Cost of Goods by Contract Type
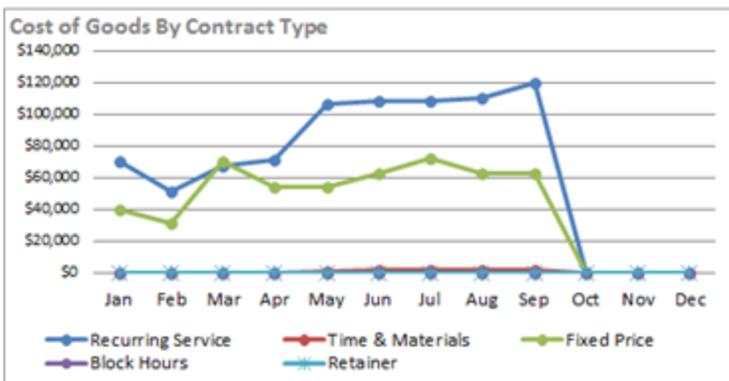
Y Axis = Cost of Goods Sold
X Axis = Months
Lines =Each color coded line represents a contract type. See the legend on your chart to determine the color to contract type association.

View costs by contract type on a month to month basis and as a year to date trend.
Compare costs generated from different contract types.

How has the cost of goods from each contract type trended over the months? In the previous chart you could see that Fixed Price and Retainer contracts were generating the highest percentage of costs. In this chart, you can see that the monetary values associated with those contracts have remained consistently high on a monthly basis.

Gross Margin Trends

Your gross margin is calculated as revenue minus cost of goods sold. This calculation gives you an idea of how much revenue is left after paying for labor and direct costs associated with providing a service.

These nine charts look at gross margin related to your business plan, contract types, and clients to give you an idea of how your gross margin is trending and where you are generating the highest gross margins.

Gross Margin versus Plan
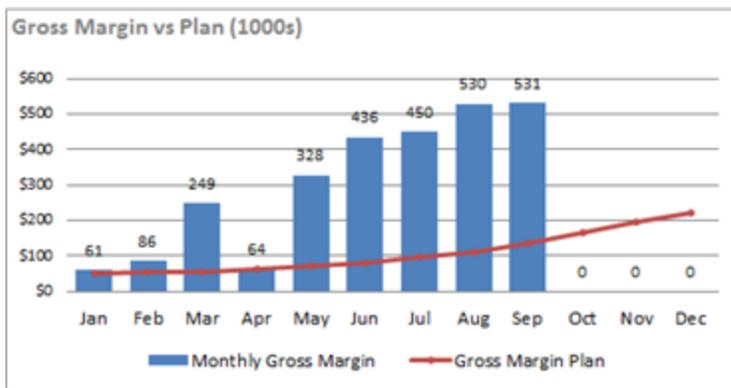
Y Axis =Gross margin (1000s)
X Axis = Months
Columns = Total gross margin per month
Red line = Monthly gross margin Plan targets

Actual gross margin per month compared to monthly Plan targets for those costs

View how your monthly gross margin compares to your plan, and follow trends from month to month.

How much gross margin (revenue minus cost of goods sold) is being generated?

Cumulative Gross Margin versus Plan (1000s)
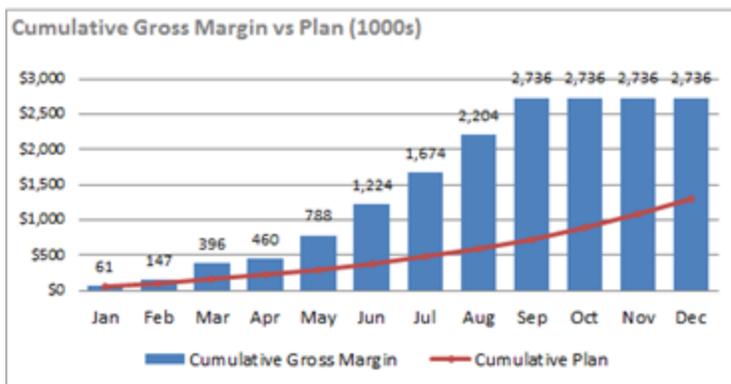
Y Axis = Gross margin (1000s)
X Axis = Months
Columns = Total gross margin, cumulative from month to month
Red line = Cumulative monthly gross margin Plan targets

View the cumulative trend in your monthly gross margin and how that trend compares to your plan, and follow gross margin trends from month to month.

Year to Date Gross Margin by Contract Type

Each color coded segment represents the percentage of total gross margin associated with the corresponding contract type. See the legend on your chart to determine the color to contract type association.
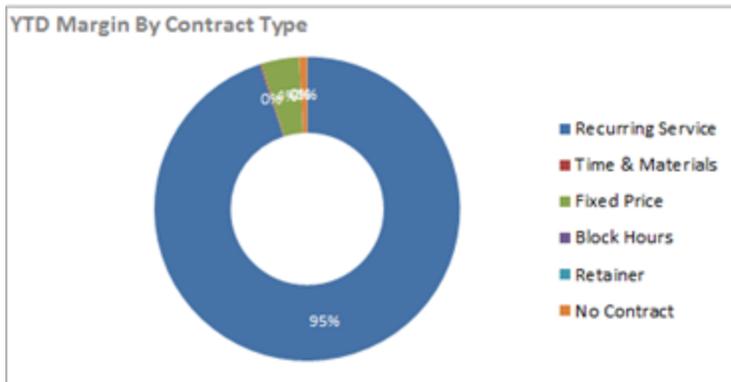The actual percentage value for a segment appears in white.

In your workbook, hover over a segment in the chart to display details.

Compare how the percentage of gross margin differs by contract type so far this year. See which contract types are generating the highest gross margin.

How much money are you keeping after your costs of good for the services associated with each contract type?

Gross Margin by Contract Type
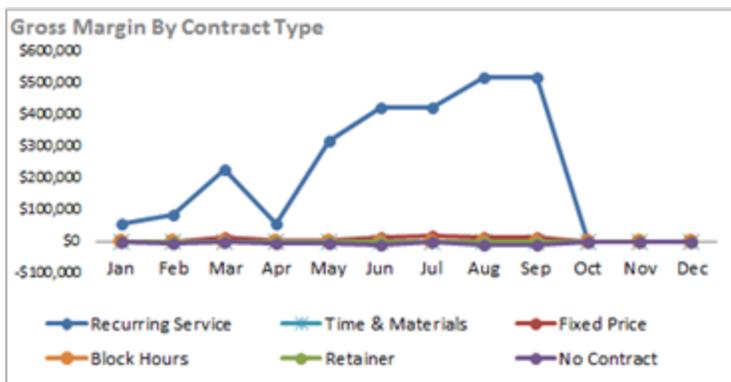
Y Axis = Gross Margin
X Axis = Months
Lines =Each color coded line represents a contract type. See the legend on your chart to determine the color to contract type association.

View gross margin amounts by contract type on a month to month basis and as a year to date trend.
Compare gross margin amounts generated from different contract types.

How is your margin from each contract type trending over the months? You can see in this example that even recurring service contracts, which generate a steady income flow, can have months where costs are higher than usual and so gross margin goes down. But the overall trend for recurring service contracts remains high.

Average Client Gross Margin

Y Axis = Gross Margin
X Axis = Months
Line = Average gross margin per client

Average client gross margin = total gross margin for the month divided by the number of clients billed that month.

How has the average gross margin per client been trending over the month?

Gross Margin Distribution (# of Clients)
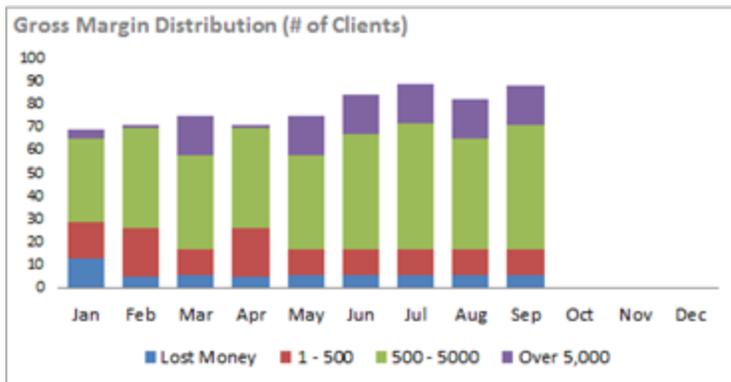
Y Axis =Number of Clients generating revenue or costs
X Axis = Months
Columns = Number of clients with gross margin values for the month indicated.
Color coded column segments = the number of clients that, during the indicated month, had a gross margin amount that fell within the ranges indicated in the chart legend.

In this chart, Blue (bottom segment) = lost money, Red (second from bottom) = 1 - 500, Green (third from bottom) = 500 - 5,000, and Purple (top segment) = gross margin over 5,000
In your workbook, hover over a segment to view details.

In May, the largest number of clients fell within the green segment, that is, the gross margin for these clients fell between 500 and 5000.

It's useful to understand the number of clients who are generating gross margin in specific ranges. In the example, each month there were clients that lost money, with the highest number, 13, in January. How many clients are you losing money on?

The following three charts will always use Jan-Dec data.

YTD Top Accounts By Gross Margin (1000s)
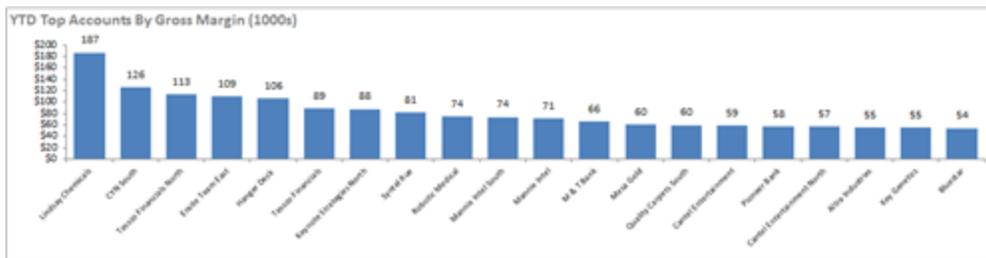
Y Axis = Gross margin (1000s)
X Axis = 15 accounts generating the highest gross margins year to date
Blue column = Gross margin for the client indicated

View the 15 clients that have generated the highest gross margin so far **this calendar year**.

Which of your clients have generated the highest margin in the current *calendar* year. (This chart will always use Jan-Dec data).

YTD Bottom Accounts By Gross Margin (1000s)
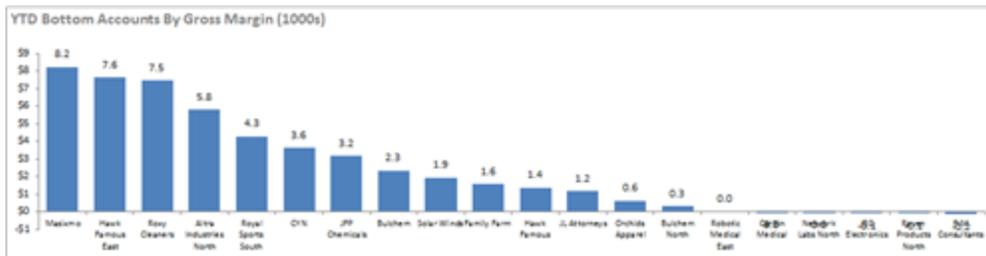
Y Axis = Gross margin (1000s)
X Axis = 15 accounts with the lowest gross margins year to date
Blue column = Gross margin for the client indicated

View the 15 clients that have generated the lowest gross margin so far **this calendar year**.

Which of your clients have generated the least margin in the current *calendar* year? Have you lost money on any client? (This chart will always use Jan-Dec data).

YTD Bottom Accounts By % Gross Margin
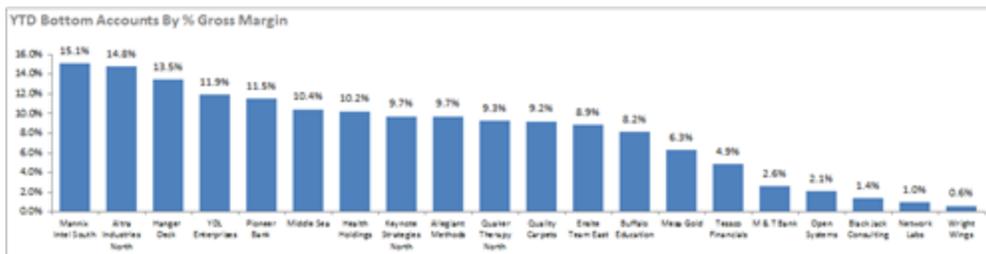
Y Axis = Gross margin percentage
X Axis = 15 accounts with the lowest gross margin percentages year to date
Blue column = Gross margin percentage for the client indicated

Gross margin percentage = Gross Margin/Total Revenue

View the 15 clients that have generated the lowest gross margin percentage so far **this calendar year**.

Which of your clients has the lowest percent of gross margin in relation to revenue generated so far this calendar year? (This chart will always use Jan-Dec data).

Financial Trending: Year Over Year

In addition to having an annual plan and watching trends from month to month, it's helpful to compare your current performance to the previous year. The Year Over Year tab provides thirteen charts that compare your current year to date data with the data from the previous year.

The charts include current year trends for revenue and margin, broken out by client, contract type, and revenue type. They compare those trends, by month or by quarter, to the data from the previous year.

Key Metrics

Five key metrics for the current year, calculated year to date, are displayed across the top of the worksheet: Revenue, COGS (Cost of Goods Sold), Gross Margin, Op Expenses (Operating Expenses), EBITA (Earnings before interest, taxes, and amortization)

Have you recently started with Autotask? All data for the previous fiscal year tab is stored in the FinancialsPrevious tab. If you have not been using Autotask long enough to have data in the FinancialsPrevious tab, you can manually enter data from the previous year in the green cells on that tab. Refer to **"Financial Analysis: Current and Previous Fiscal Year" on page 162**.

Revenue Trends

These seven charts look at revenue totals to show how your current year to date revenue compares to the previous year.

Revenue versus Previous Year (1000s)
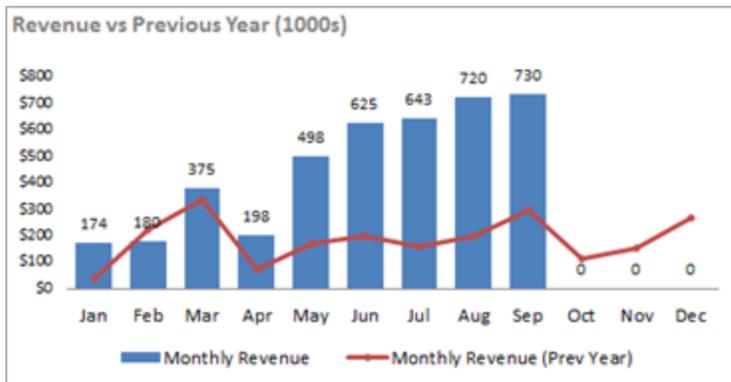
Y Axis = Revenue (1000s)
X Axis = Months
Columns = Actual monthly revenue
Red line = Monthly revenue previous year

View posted revenue for each month year to date compared to actual monthly revenue from the previous year.

Here you see the posted revenue for each month versus the previous year's performance. In the chart above, revenue was low in April of this year, and the same was true last year. This might indicate a seasonal variation that affects revenue.

Cumulative Revenue versus Previous Year (1000s)
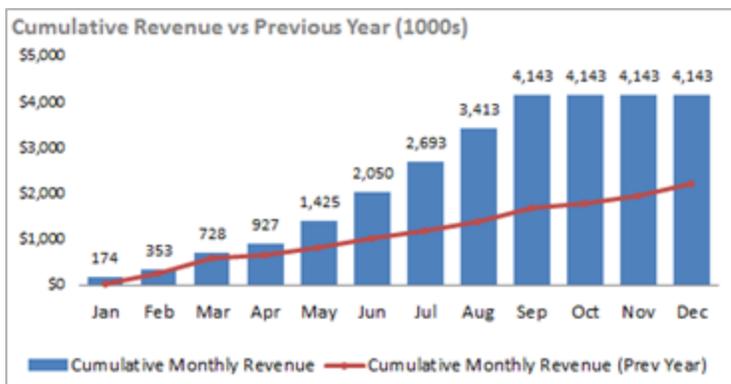
Y Axis = Revenue (1000s)
X Axis = Months
Columns = Actual monthly revenue
Red line = Monthly revenue previous year

View posted revenue for each month year to date, cumulative from month to month. Compare to cumulative values of monthly revenue from the previous year.

How does your cumulative revenue performance year to date compare to the previous year? Notice that with the cumulative totals, the dramatic dips and rises even out to show a steady rise across the months for both years.

Quarterly Revenue versus Previous Year (1000s)
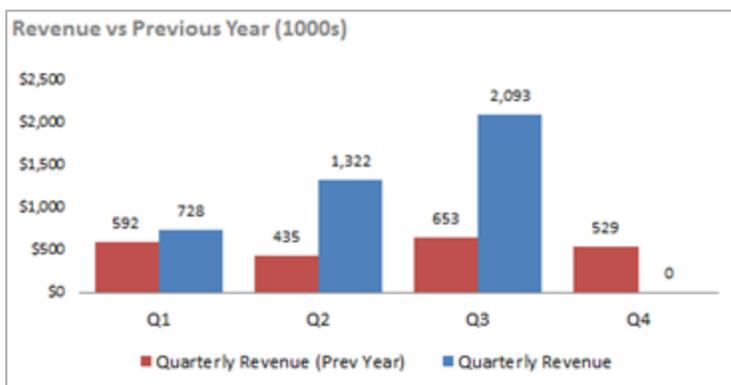
Y Axis = Revenue (1000s)
X Axis = Fiscal year quarters
Blue Columns = The revenue generated each quarter, year to date, for the current fiscal year
Red columns = The revenue generated each quarter for the previous fiscal year

View total revenue generated by year to date for each quarter. Compare current and previous year quarterly revenue.

This chart compares quarterly revenue performance to last year's quarterly results. In spite of month to month variations, this year's quarterly results are far stronger than those for last year.

Average Revenue per Client
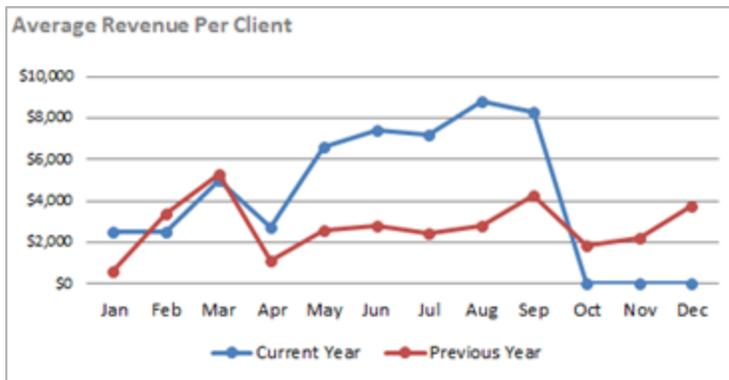
Y Axis = Revenue
X Axis = Months
Blue line = Average monthly revenue per client, year to date
Red line = Average monthly revenue per client, previous year.

View average revenue posted for each client for each month year to date. Compare to average monthly revenue from per client from the previous year.

How does the average revenue per client compare to the previous year? In the example, the current average per client is higher and rising steadily (there is no data for October, November, December this year). This indicates that the business is going up market, that is, providing more work for clients that are paying more for service.

Recurring Revenue (% of total)
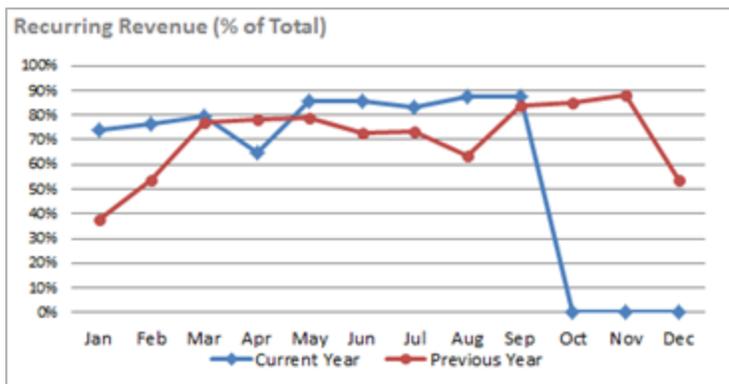
Y Axis = Percent of Revenue
X Axis = Months
Blue line = Current year percent of total monthly revenue derived from recurring revenue services
Red line =Previous year percent of total monthly revenue derived from recurring revenue services.

View the percentage of total revenue derived from recurring services. Compare to previous year.

This chart shows the trend of recurring revenue as a total compared to the previous year. This information is especially useful for companies that are transitioning to a recurring services model. In the example, you can see that in the current year, with the exception of one month, recurring revenue was consistently generating 70 - 90 % of total revenue.

Revenue By Contract Type for Previous and Current Years
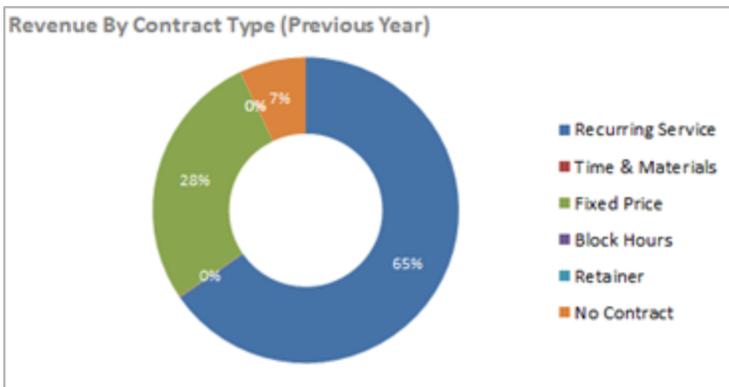
Revenue By Contract Type (Previous Year)

Each color coded segment represents the percentage of total revenue derived from the corresponding contract type.

See the legend on your charts to determine the color to contract type association.

The actual percentage value for a segment appears in white text in that segment. In your workbook, you can hover over a segment in the chart to display details.

Revenue By Contract Type (This Year)
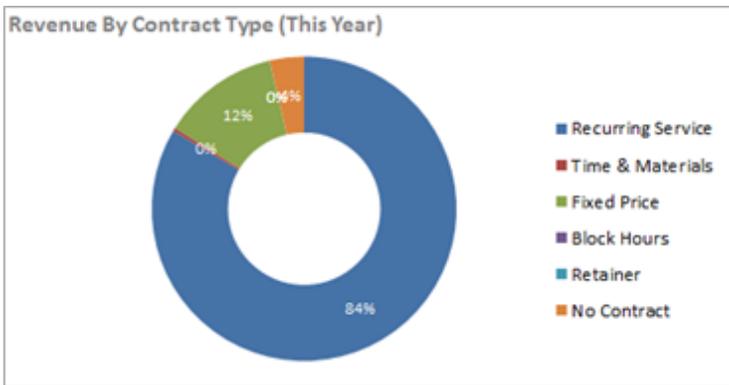
Compare the percent of revenue generated by the different contract types in the previous year and in the current year charts.
Compare how the revenue percentages for the contract types differ between the two charts.

These two charts show the percentage of total revenue derived from different contract types. They provide a side by side comparison of the current and previous fiscal years. You can see whether the distribution has changed and by how much.

Gross Margin Trends

These six charts show your gross margin trends for the current year to date, and how those trends compare to the previous year. Gross margin, or revenue minus cost of goods sold, gives you an idea of how much of your total revenue you actually keep.

Gross Margin versus Previous Year (1000s)

Y Axis = Gross margin (1000s)
X Axis = Months
Columns = Monthly gross margin, current year
Red line = Monthly gross margin, previous year

View your gross margin for each month year to date, compared to gross margin for each month from the previous year.

In this chart, there were several months in the previous year where this business lost money. The current year is far stronger in growth, with no months where gross margin hit negative values.

Cumulative Gross Margin versus Previous Year (1000s)
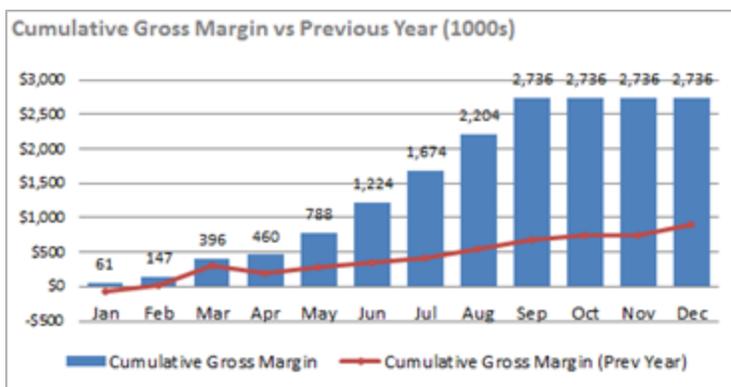
Y Axis = Gross margin (1000s)
X Axis = Months
Columns = Cumulative monthly gross margin, current year
Red line = Cumulative monthly gross margin, previous year

View your cumulative gross margin for each month year to date, compared to cumulative gross margin for each month from the previous year.

Cumulative values show that, while this company lost revenue in January and April of the previous year, the gross margin in February and March of that year was strong enough to keep the cumulative values from falling back into negative values. And the cumulative values for the current year are much stronger than the previous year.

Quarterly Gross Margin versus Previous Year (1000s)
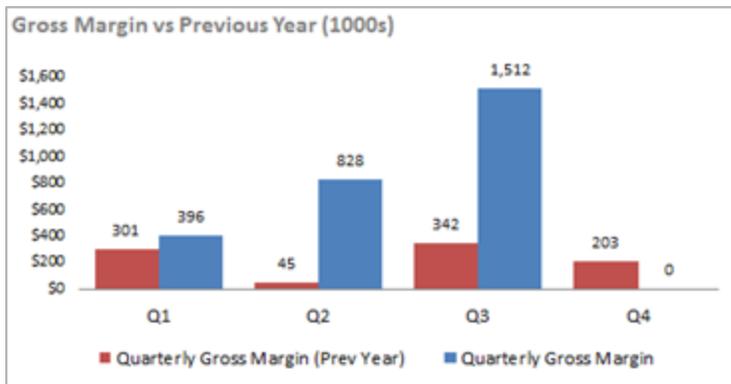
Y Axis = Gross margin (1000s)
X Axis = Fiscal year quarters
Blue Columns = The gross margin for each quarter, year to date, for the current fiscal year.
Red columns = The gross margin for each quarter for the previous fiscal year.

View total gross margin for each quarter, year to date and total gross margin for each quarter of the previous year. Compare current and previous year quarterly gross margin.

This chart compares the current year's quarterly performance to last year's quarterly results.

Average Client Gross Margin
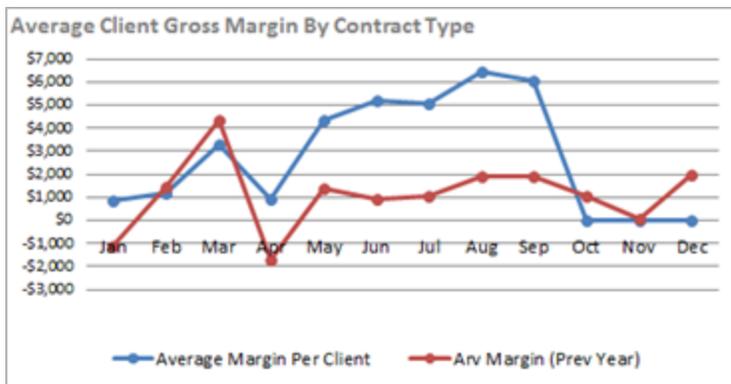
Y Axis = Gross Margin
X Axis = Months
Blue line = Average gross margin per client, current year
Red line = Average gross margin per client, previous year

Average client gross margin = total gross margin for the month divided by the number of clients billed that month.
Compare the current year's average gross margin per client to the previous year.

When your average client gross margin is improving, you are most likely increasing revenue and keeping your costs under control.

Gross Margin By Contract Type for Previous and Current Years
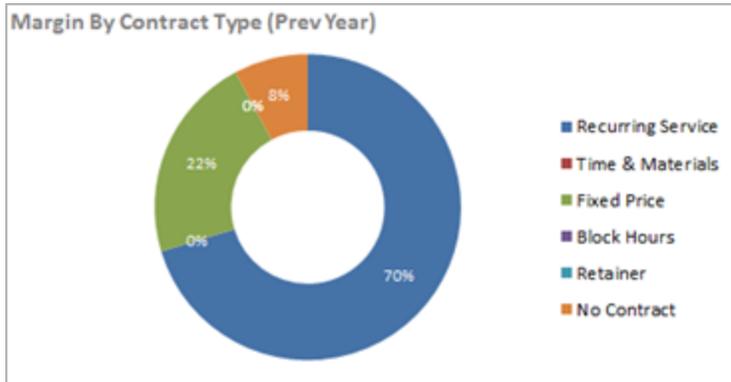
Each color coded segment represents the percentage of gross margin derived from the corresponding contract type.

See the legend on your charts to determine the color to contract type association. The association is the same for the top chart (previous year) and the bottom chart (current year).

The actual percentage value for a segment appears in white text in that segment. In your workbook, you can hover over a segment in the chart to display details.
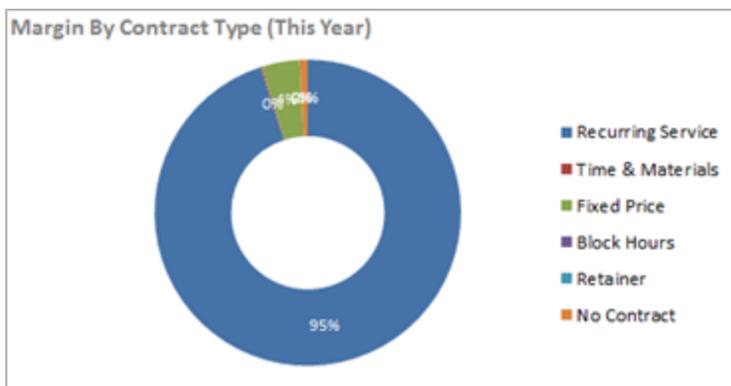
Compare the percent of gross margin generated by the different contract types in the previous year and in the current year.

These two charts show the percentage of total gross margin derived from different contract types. They provide a side by side comparison of the current and previous fiscal years. You can see whether the distribution has changed and by how much. How does the data for gross margin compare with revenue by contract type data?

Explore General Financial Data

This worksheet lets you drill down to view details behind the revenue, cost of goods, and gross margin data you've seen in your other worksheets. You can learn what was going on during a specific time period, or follow a specific client or contract type. Then, use the seven slicer controls to filter the data by quarter, month, contract type, revenue category, billing type, client, or individual contract.

As you select your filters, the key metrics at the top of the page and the sixteen charts update immediately to display the data you want. Below the charts, a table displays the filtered data that underlies the charts.

Key Metrics

Three key metrics, Revenue, COGS, and Gross Margin appear in the upper left corner of this worksheet. The totals displayed here reflect the filter options selected in the slicers to the right. When you change a filter, the key metric data updates immediately.

Filter the Data

If you have already viewed the charts on the Trending worksheets, you will be familiar with much of the data on this worksheet. The difference here is the seven data slicers: Quarter, Month, Contract Type, Revenue Category, Billing Type, Account (Client) and Contract. With slicers you can click to choose which data you want to see in your charts. You can select a single option from one slicer or you can combine multiple criteria from one or more slicers.

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.

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

  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.

View and Compare

View the overall data, then select one or more filters to find out more about what drives the general trends. You can filter by quarter or month, by contract type or category, by work type, account, or individual contract.

 The filters you select are also applied to the underlying data that appear in the table below the charts.

Revenue and Direct Costs
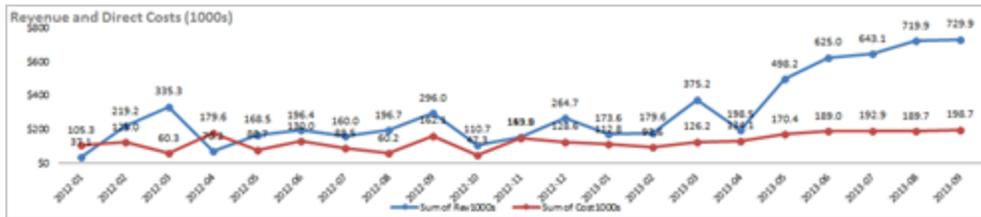
Y Axis = Revenue
X Axis = Months
Blue line = Revenue by month (1000s)
Red line = Cost per month (1000s)

View total revenue per month and total costs per month over the time frame you specify.

It's good to see monthly revenue versus cost trends over time. It's even better when you can filter the data to see how revenue compares to cost for different contract types, revenue categories or accounts. You can even monitor the performance of a single long term contract that's coming up for renewal.

Total Revenue versus Cost
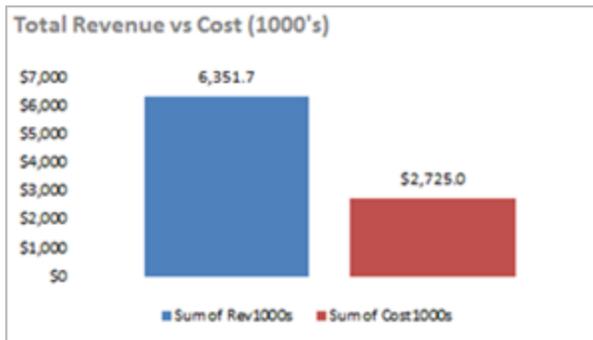
Y Axis = Monetary amount by thousands
Blue column = Total revenue for criteria you specify (1000s)
Red column = Total costs for criteria you specify(1000s)

View revenue versus cost comparison for all available data, or filter by specific criteria to see the revenue cost comparison for the specified data.

With this basic chart you can quickly view total revenue versus costs for any of the factors available in the slicers. For example, you can check the overall revenue versus cost for a single account, and then filter by the different Billing Types you bill to that account to see which are performing well.

Revenue and Cost by Quarter
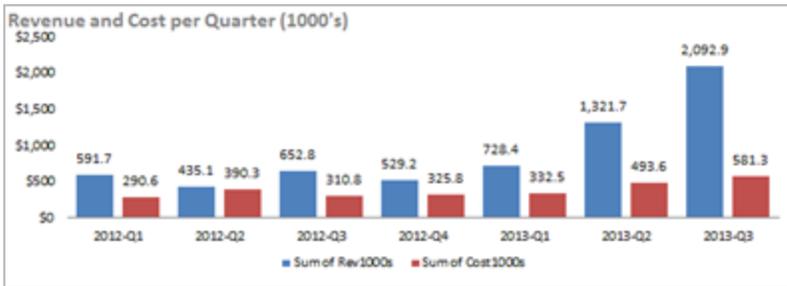
Y Axis = Monetary amount by thousands
Blue column = Total revenue by quarter for the time frame that meets the filter selections (1000s)
Red column = Total costs by quarter for the time frame that meets the filter selections (1000s)

View revenue versus cost by fiscal year quarters for all available data, or filter by specific criteria to find see the revenue cost comparison for selected data.

For some data you may want to check your data by fiscal year quarters.

Revenue by Contract Type
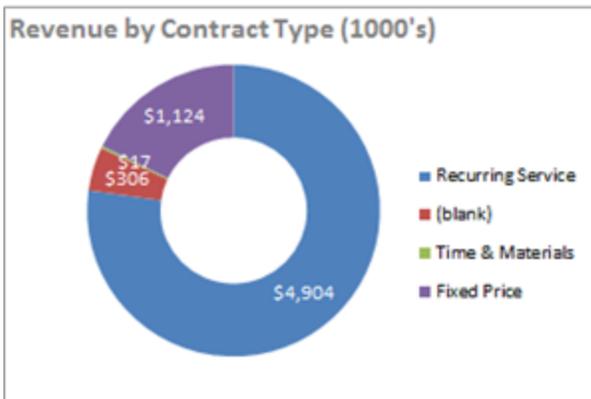
Each color coded segment represents the amount of revenue generated by the corresponding contract type.
See the legend on your chart to determine the color to contract type association.
The actual value for a segment appears in white text in that segment.
Hover over a segment in the worksheet to display details and percent of revenue.

Compare the amount of revenue generated by different contract types.
Use the slicers to compare revenue for contract types by Account, Quarter, Month, or Billing Type.

Compare the results in this chart with the Margin by Contract Type chart to see how high revenue contract types are doing by margin.

Revenue by Contract Category
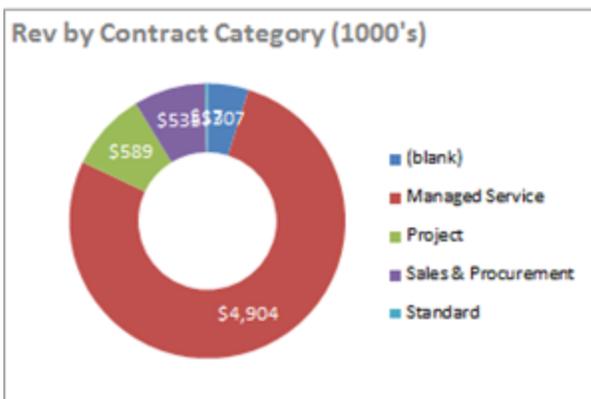
Each color coded segment represents the total revenue generated by the corresponding contract category.
See the legend on your chart to determine the color to contract category association.
The actual value for a segment appears in white text in that segment.
Hover over a segment in the worksheet to display details and the percent of revenue.

Compare the amount of revenue generated by different contract categories.
Use the slicers to compare revenue for contract categories by Account, Quarter, Month, or Billing Type.

Compare the results in this chart with the Margin by Contract Category chart to see how high revenue contract categories are doing by margin.

Margin by Contract Type
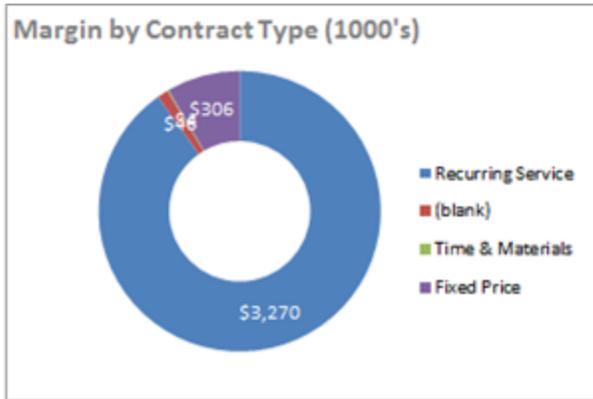
Margin by Contract Type (1000's)

$306
$98
$3,270

- Recurring Service
- (blank)
- Time & Materials
- Fixed Price

Each color coded segment represents the total gross margin generated by the corresponding contract type.
See the legend on your chart to determine the color to contract type association.
The actual value for a segment appears in white text in that segment.
Hover over a segment in the worksheet to display details and the value as percentage.

Compare the margin generated by different contract types. Margin = Total Revenue from selected contract types minus cost of goods sold for that contract.
Use the slicers to compare gross margin for different contract types by Account, Quarter, Month, or Billing Type.

Margin by Contract Category
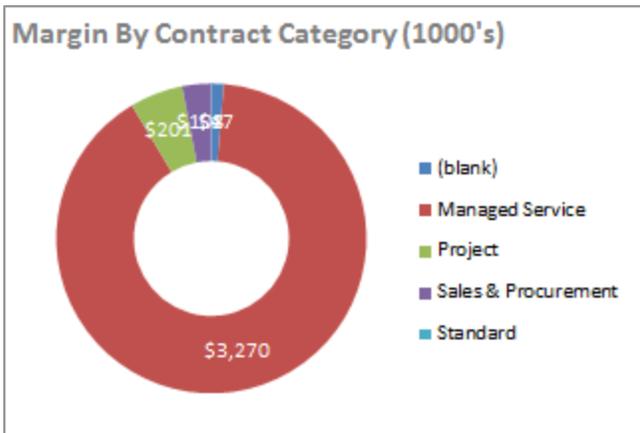
Margin By Contract Category (1000's)

$201 $15 $7
$3,270

- (blank)
- Managed Service
- Project
- Sales & Procurement
- Standard

Each color coded segment represents the total gross margin generated by the corresponding contract category.
See the legend on your chart to determine the color to contract category association.
The actual value for a segment appears in white text in that segment.
Hover over a segment in the worksheet to display details and the gross margin value as a percentage.

Compare the total gross margin generated by different contract categories. Gross Margin = Total revenue from selected contract categories minus cost of goods sold.
Use the slicers to compare contract categories by Account, Quarter, Month, or Billing Type.

Percent Margin by Contract Type
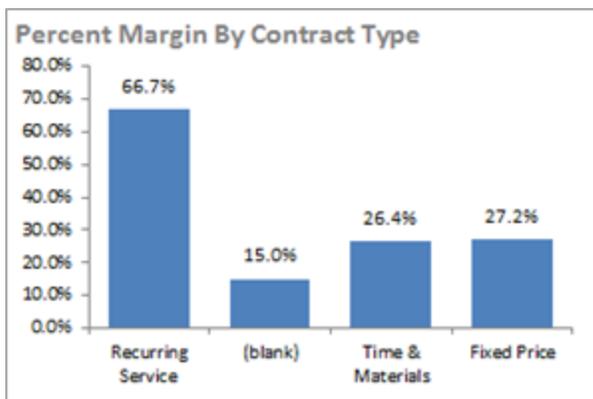
Y Axis = Gross Margin Percentage (Gross Margin divided by Revenue)
X Axis = Selected contract types
Column = Gross margin percentage for specified contract type

View gross margin percentage for each contract type. Gross margin percentage = total revenue minus total cost of goods, divided by total revenue.

The higher the gross margin percentage, the more money you are keeping.

Percent of Margin by Contract Category
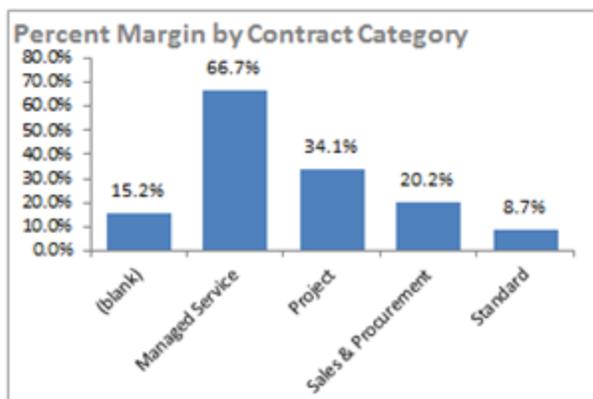
Y Axis = Gross margin percentage (Gross Margin divided by Revenue)
X Axis = Selected contract categories
Column = Gross margin percentage for specified contract category

View gross margin percentage each contract category. Gross margin percentage = total revenue minus total cost of goods, divided by total revenue.

Revenue by Billing Type
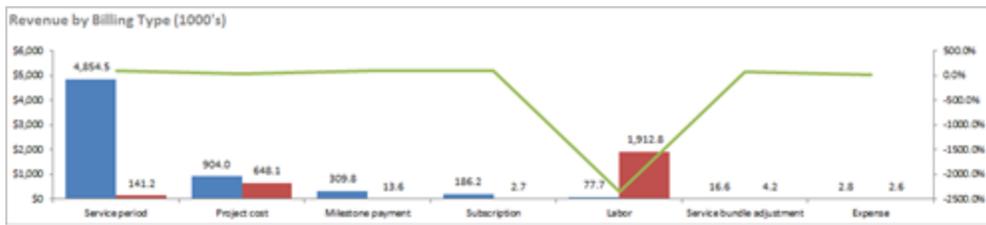
Y Axis = Monetary amount by thousands
X Axis = Billing types
Secondary value axis = Percentage
Blue column = Total revenue by billing type (1000s)
Red column = Total costs by billing type (1000s)
Green line = Gross margin percentage
View revenue versus cost for selected billing types.

Compare revenue, costs, and gross margin percentage for billing types over the time frame you specify. Compare these values by account, contract type or category, or individual contract.

Top Clients By Revenue, Gross Margin, and Gross Margin Percentage

The three charts in this group display your top five clients by one of three metrics: revenue, margin, or margin percentage.
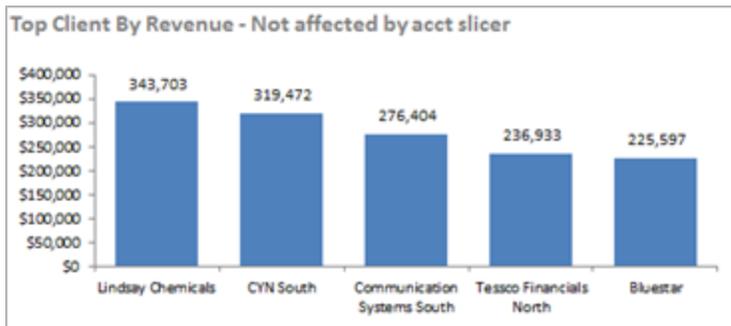
Top Client By Revenue - Not affected by acct slicer

Y Axis for Revenue and for Gross margin= Monetary amount
Y Axis for Gross margin percentage = percentage
X Axis = Client name
Column = Total revenue, gross margin, or gross margin percentage

Top Clients by Margin - Not affected by acct slicer
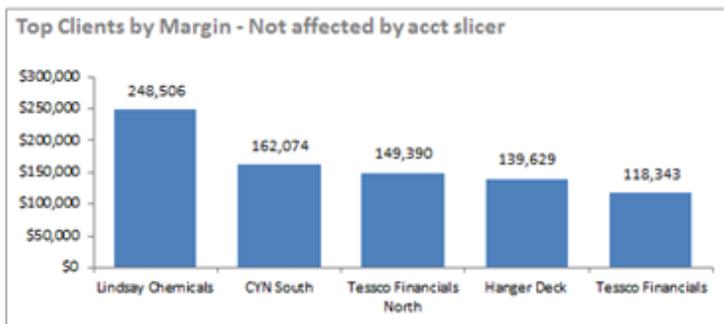
View the five clients that:
Generated the highest amount of revenue
Or had the highest gross margin (revenue minus cost of goods sold)
Or had the highest gross margin percentage (margin divided by revenue)

Top Clients by % Margin - Not affected by acct slicer
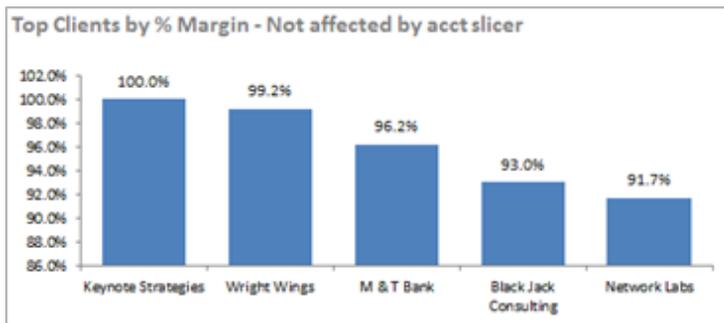
You can quickly see which clients are generating the most revenue, but depending on their costs, they may or may not be generating the best gross margin.

Even when a client appears in the top five clients for revenue and the top five clients for gross margin, that client may not show up in the top five clients by gross margin percentage. A high gross margin percentage simply indicates that you kept a high percentage of the revenue generated by that client, regardless of the amount of total revenue.

Bottom Clients By Revenue, Gross Margin, and Gross Margin Percentage

The three charts in this group display your bottom five clients by one of three metrics: revenue, gross margin, or gross margin percentage.
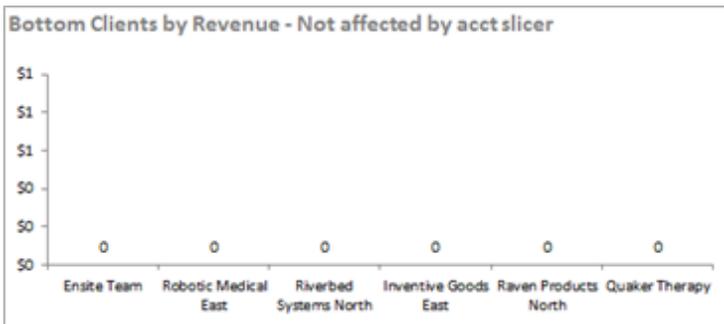
Bottom Clients by Revenue - Not affected by acct slicer

Y Axis for Revenue and for Gross margin= Monetary amount
Y Axis for Gross margin percentage = percentage
X Axis = Client name
Column = Total revenue, margin, or margin percentage

View the five clients that:
Generated the least amount of revenue
Or had the lowest gross margin (revenue minus cost of goods sold)
Or had the lowest gross margin percentage (gross margin divided by revenue)
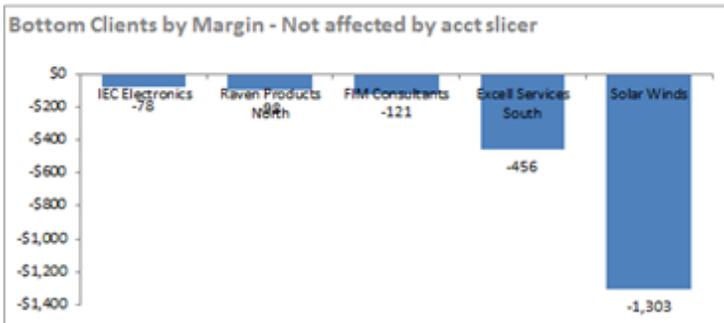
The Revenue chart shows you which clients are generating the least amount of revenue.

Bottom Clients by Margin - Not affected by acct slicer

The bottom clients by gross margin show you the five clients with the lowest gross margin. If the gross margin for those clients fell into the negative range, your business lost money on those clients. What changes can you make to prevent further losses?
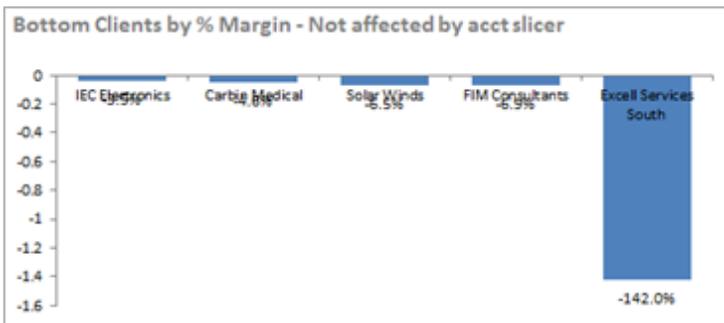
The bottom clients by margin percentage show you which clients are generating the least return for the revenue they generate

Bottom Clients by % Margin - Not affected by acct slicer

.

If a client shows 0 revenue, is that because you have not done any business with that client during the specified time frame? Should your sales team contact them? If their gross margin or gross margin percentage is in the negative range, you are losing money on those clients, even if they are not among your bottom five clients by revenue. You probably want to look at how you do business with these clients. And, for high revenue clients, as long as the margin percentage is above 0, a lower margin percentage may be acceptable.

Resource Utilization

The six charts on this page display data on how employees who track their time through Autotask are spending that time. Six data slicers let you filter time entry data by year, month, resource (employee), labor type (indirect or service), type of time (personal, project task, regular, or service desk ticket), and work type.

Key Metrics

Two key metrics appear at the top left side of the page, Worked and Billed. You can quickly see how many hours were worked and how many were billed for the time frame, resource, or whatever other filters you select.

View Resource (Employee) Time Data

Labor is probably your highest business cost. It's not enough to know that your employees are working hard and putting in their scheduled hours. You need to monitor labor costs as carefully as you monitor every other cost or expense. Do you know whether you are generating enough billable hours, or whether your highly paid technicians are spending too much time on administrative work? The charts on this worksheet can get you started monitoring your resource utilization.

Hours by Month
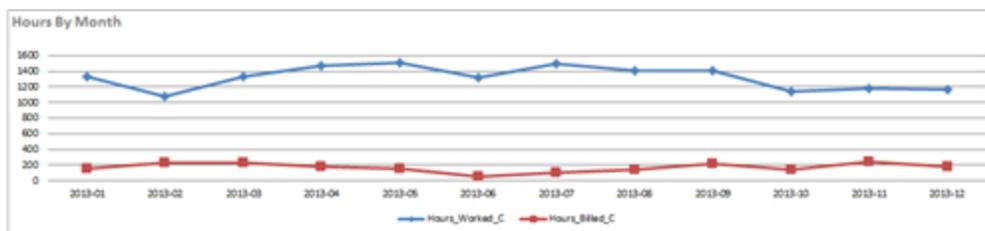
Y Axis = Number of hours
X Axis = Month and year
Line with diamond ◊ markers = Hours Worked
Line with square ☐ markers = Hours billed

View and compare the number of hours worked and the number of hours billed by month for the specified time frame.

You can take these general numbers and use the slicers to compare the hours worked to the hours billed for types of time and individual resources.

Hours by Type of Time
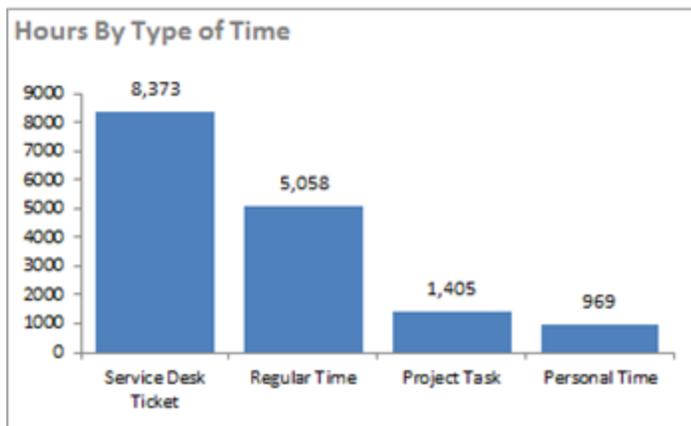
Y Axis = Number of Hours
X Axis = Type of time
Column = Hours worked for each type of time

View the number of hours resources spent on different types of time: time entered on tickets, time entered on project tasks, regular time (not ticket or task time), and personal time.

This chart provides information like how your service desk ticket time compares to project time for work types like Admin, Onsite Support, and Project Management. You can also look at individual resources to see how they are spending their time.

Hours by Labor Type
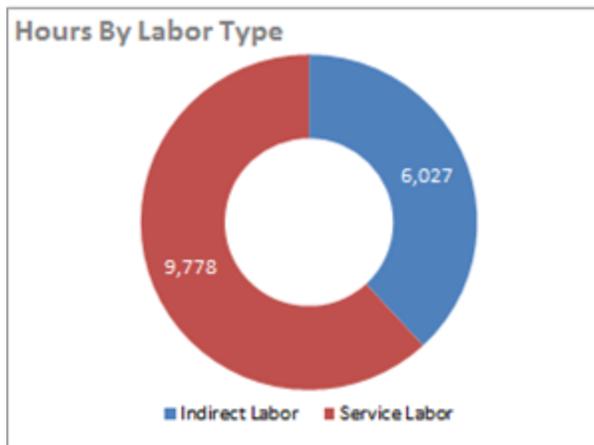
Each color coded segment represents the number of hours worked on the corresponding type of labor.
See the legend on your chart to determine the color to labor type association
The hours value for a segment appears in white text in that segment.
In the worksheet, hover over a segment to display details.

Compare the number of indirect labor hours worked to the number of service labor hours worked.

This chart lets you monitor indirect versus service labor by time frame, resource, and selected work types. Although some work types are specific to one labor type, others may include a mix of indirect and service labor, for example, Project Management and Sales Support.

Hours Worked by Billable Type
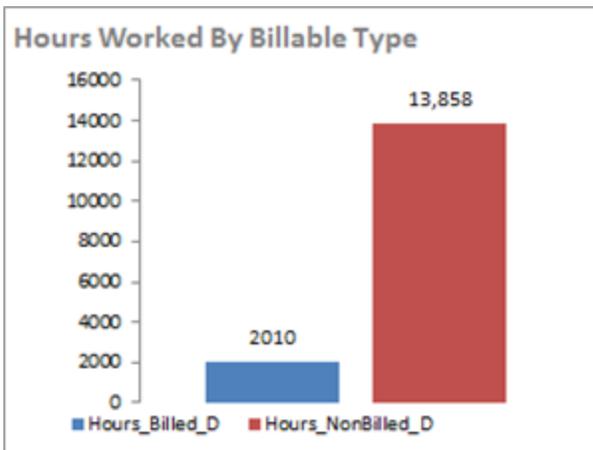
Y Axis = Number of Hours
Blue column = Hours billed
Red column = Hours not billed
Note that your chart may use different colors. Check the chart legend.

View and compare the number of hours billed and the number of hours that were not billed.

Hours by Resource
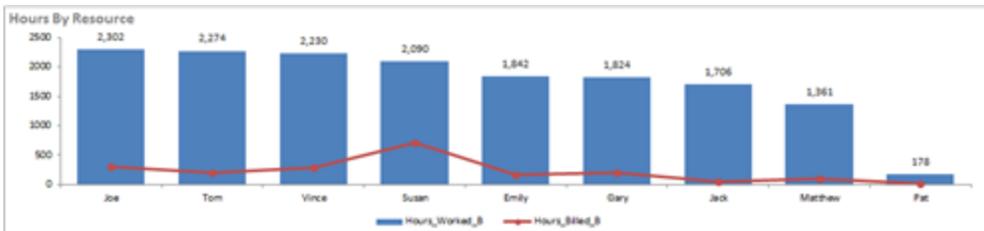
Y Axis = Number of hours
X Axis = Resources
Columns = Hours Worked
Line = Hours billed

View and compare the number of hours worked and the number of hours billed for each resource.

This chart shows you how many hours each resource has worked and how many of those hours are billable. You can filter by year or month to track billable hours over time, and filter by Work Type to see who is charging time against certain work types and how much if any of that time is billable. You can also check on details like how many hours are resources spending on meeting time or personal time.

Hours by Work Type
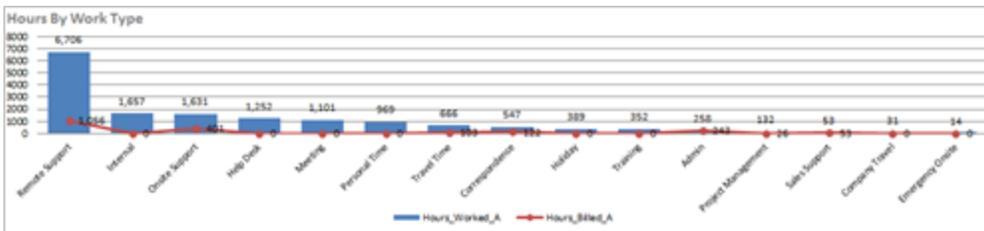
Y Axis = Number of hours
X Axis = Work type
Column = Hours Worked
Line with square ▢markers = Hours billed

View and compare the total number of hours worked for each work type and the number of hours billed for the work type.

This chart provides an overview of how many hours are charged to your different work types and how many of those hours are billable. Should you be billing for more of your Project Management or Onsite Support time? You can filter by resource to check details like whether individuals are allocating their time appropriately for their job.

Explore Margin

This worksheet contains only one chart that lets you explore account revenue and percent of margin. These metrics show you not only how much you are making, but how much you are keeping.

The chart includes five slicers to filter data. A table that contains the underlying data is located below the chart.

Key Metrics

Three key metrics that reflect the filtered data appear at the top of the chart: Revenue, COGS (Cost of Goods Sold) and Gross Margin (Revenue minus COGS).

Filter the Data

You can use the five data slicers to filter the chart data by quarter, month, contract type, contract category, and account. The key metrics and underlying data in the table below the chart reflect the filtered data.

Revenue versus Gross Margin % Scatter Chart

This chart is the only chart on the worksheet.
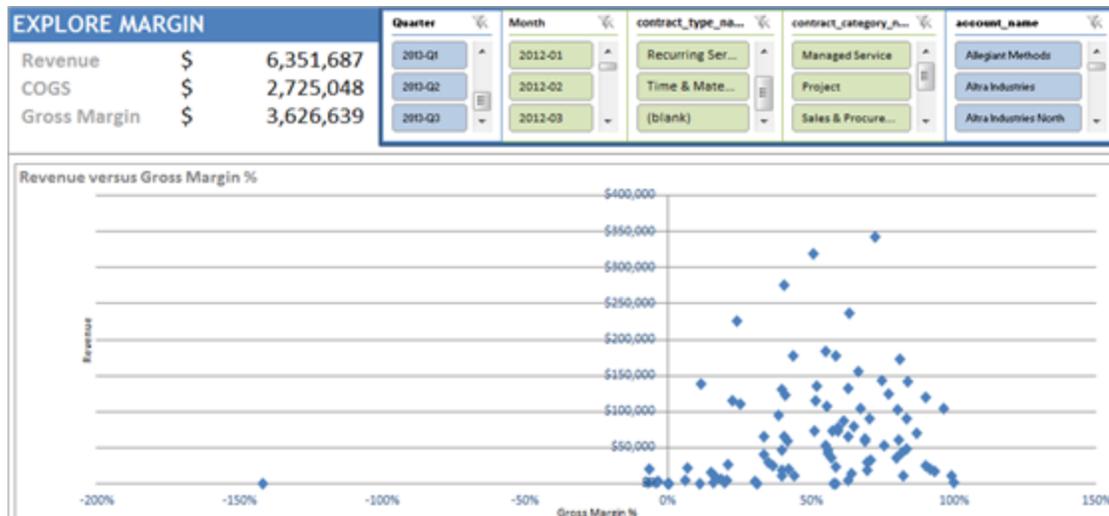
Y Axis = Revenue

X Axis = Gross Margin Percentage

Data points = Revenue and gross margin percentage by Account

Each of the data points scattered across the chart represents the Total Revenue and the Gross Margin Percentage for an account. You can quickly see how your accounts compare in total revenue and gross margin percentage. In your work-sheet, hover over a point to view details.

Are there any data points in the negative quadrant? You know immediately that the gross margin percentage for these accounts is a negative value and you are losing money on those accounts, regardless of the total revenue.

Filter by year or month to see Account revenue and gross margin percentages at different times. Do they improve from month to month for the current year? And how do they compare to the previous year?

How does the data point pattern display for different contract types and categories? Is there one contract type or category that consistently does not perform well?

Select an individual account from the Account Name slicer to see where that account lands on the chart. Refer to the key metrics to see the total Cost of Goods Sold and Gross Margin for that account. Or, select two or more accounts to compare them and see their combined revenue and costs.

Financial Analysis: Current and Previous Fiscal Year

The FinancialsCurrent and FinancialsPrevious tab worksheets are similar. They store the data that appears in the work-book charts and tables. Data is presented as a spreadsheet, grouped and sorted to correspond to the visual presentations. You can easily view and compare the data on these tabs. Sparklines provide a quick visual key to trends year to date by month and by quarter.

- The **FinancialsCurrent** tab contains the Financial Analysis worksheet. It stores the current fiscal year data. It is a dynamic worksheet that will change regularly as you update your workbook with the most current data. This worksheet is where you enter your financial plan targets. You can also add monthly revenue, cost, and operating expense data that is not stored in your Autotask database.

- The **FinancialsPrevious** tab stores the financial data from the previous fiscal year. The data will usually remain static and is used for comparison purposes.

The data download for the Financial workbook includes selected financial data from your previous fiscal year and year to date for the current year. At the end of the current fiscal year, the current year data becomes the Previous year and the Current Year Financial Data is downloaded as it becomes available.

Metrics that Matter

The first data rows in the Current Year worksheet display the thirteen Metrics that Matter. These are the key metrics that appear on the Metrics tab. Selected metrics from this group also appear at the top of the other Financial worksheets. You can, if you want, change the labels for these values. Simply click in the label cell and update.

Set Plan Goals for Current Year

In order to view your financial plan target data in the workbook charts, you must enter those values in the Current Year worksheet. The Plan cells are green.

You can also set a Type for each financial target: Over, Under, or None.

- Over indicates that your goal is to meet or exceed the plan target.

- Under indicates that you want to stay below the target value.

- None applies no type.

For example, for revenue, you want your total revenue to meet or exceed the plan target; for cost totals, you want to stay under the plan target.

Set Plan Goals

1. Save a backup copy of your workbook.

2. In your workbook, click the **FinancialsCurrent** tab.

3. In the worksheet, scroll to right to find the column labeled Target Type. It should be column AB, or close to AB (the Financial worksheets can vary slightly between workbooks). The cells in this column are green.

4. Scroll **down** to the row for the first set of values you want to enter.

5. In that row, click in the **Target Type** cell and you will see a down arrow.

6. Click the arrow to open the menu and select your preference: Over, Under, or None.

7. To the right of Target Type is the column labeled **Jan Plan**.

   To the right of Jan Plan there is a column for each additional month of the year.

8. Find the **cell** where the Jan Plan column intersects with the row to which you want to add plan values.

9. Click in the cell and enter the **January plan value** for that row.

10. Move to the next Month Plan column and enter the value for that month. Repeat for each month. You can copy and paste where different months have identical values.

    You can see the Plan values immediately in worksheet charts that display Plan lines.

11. **Save** the workbook.

12. **Repeat** Steps 3 through 7 for each additional row to which you want to add revenue goal values.

Add Additional Revenue, COGS, and Operating Expense Values

If you have additional revenue sources, costs of goods sold, or operating expenses that are not stored in your Autotask database, you can manually enter that data in the FinancialsCurrent tab worksheet. The values you enter manually are then included in the totals for your revenue, cost of goods sold, and operating expenses.

1. In the left column of the worksheet, locate the Profit & Loss section. Then locate the two rows with green labels that appear under REVENUE.

The two rows are labeled Additional Revenue 1 and Additional Revenue 2.

Beginning with the column for January of the current year, the cells in these rows are green.

2. To **change the row labels**, click in the label's cell and enter the new label.

3. To **enter values**, scroll right to the column for the month or Plan month for which you want to enter a value. Click in the cell in that column for the correct row and enter the value.

4. Repeat for any additional months you want to add revenue.

5. If needed repeat the process for the second Additional Revenue row.

6. To enter additional **Cost of Goods Sold** or **Operating Expense** values, scroll down to locate the two rows with green labels under COST OF GOODS SOLD and under OPERATING EXPENSES.

   The Cost of Goods Sold rows are labeled **Other Cost of Sales 1** and 2.

   The Operating Expense rows are labeled **Other Operating Expenses 1** and 2.

7. Repeat steps 2 through 4 for these "Other" rows.

8. If needed, repeat for the Other Cost of Sales 2 or Other Operating Expenses 2 rows.

9. **Save** your workbook.

Labor Summary and Details: Current and Previous Years

The LaborCurrent and LaborPrevious tab worksheets store the labor summary and detail data that appears in the work-book charts and tables. Data is presented as a spreadsheet, and is grouped into Labor Summary and Labor Detail. Labor Detail presents details for each employee that tracks time in Autotask.

All data is provided as total year to date, by Quarter, and for each month. Sparklines provide a quick visual key to trends over time by month and by quarter.

	Month Trend	QTR Trend	YTD	Q1	Q2
Labor Summary					
Service vs Indirect Labor					
Service Labor (Hours)			9,778	2,538	2,742
Service Labor (Billable Hours)			1,592	610	376
Indirect Labor (Regular Hours)			6,027	1,203	1,550
Total Hours			15,805	3,741	4,292
Tickets vs Tasks					
Service Desk Ticket (Hours)			8,373	2,151	2,493
Project Task (Hours)			1,405	387	250
Target Resource Hours					
Labor Detail					
Jack					
Service Labor (Hours)			1,468	103	521
Indirect Labor (Regular Hours)			238	32	28
Total Hours			1,706	135	550
% Service Hours			86%	76%	95%
Burden Rate per Hour				23	70
Indirect Labor Cost (Reg Hours)			16,643	2,246	1,980
COGS Indirect Indirect Labor			-	-	-
Operating Expense Indirect Labor			16,643	2,246	1,980

Labor Summary

The labor summary metrics break the data into service versus indirect labor. You can compare total hours to service hours, billable service hours, and indirect labor (regular hours). Service hours are also displayed as Ticket and Task hours.

You can set a target for total resource hours per month on this worksheet. Enter the target hours in the green cells on the Target Resource Hours row.

Labor Detail

The labor detail rows show a set of key metrics for each resource entering time in Autotask. You can view the number of service labor hours versus regular hours, service hours percentage of total hours , the employee's hourly burden rate, and the total indirect labor cost (Indirect Labor hours multiplies by Burden Rate) . If any indirect labor is allocated as Cost of Goods Sold, that value is subtracted from indirect labor cost to calculate Operating Expense for Indirect Labor.

Using the Projects Workbook

Every project on time and within budget? We can't promise you that! But, when you manage your projects in Autotask, the Projects Analytics workbook can help you quickly see how close your are to reaching that goal - for all projects. More importantly, you can see where you're falling behind *and* pulling ahead, and then explore those areas to gain valuable insights into your company's project management, right down to the task level.

Like all Autotask Analytic workbooks, the projects workbook presents project and task data in easy to follow graphs and charts. The data, charts and graphs are carefully chosen and configured to provide useful insights into your company's project management.

Project Metrics that Matter

The Metrics tab displays 10 key metrics that were selected to provide a quick assessment of the current state of your projects.

	This Week 5/12/2013		Last Week 5/5/2013		2 Wks Ago 4/28/2013		10 Week Trend	10 Week Met Plan	Target
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

The chart displays summary data for this week, last week, and 2 weeks ago. You can set a target for each metric for a three week time frame. Sparkline graphs and charts display the overall trend for each metric, and red icons alert you when a metric is not meeting its target.

Refer to "Viewing Key Project Metrics" on page 170.

Project Trends and Task Trends Tabs

The graphs and charts on the Task Trends and Projects Trends tabs break out project or task data to display trends over time. You can see what is happening now and analyze trends over the previous ten weeks.

Key Metrics for Trends Tabs

The Task Trends and Project Trends tabs display the following critical high level data at the top of the page. The data will reflect either tasks or projects, depending on which tab you selected.

Backlog	New	Completed	Change	% On Time	% On Budget
208	264	111	153	11%	91%

- The overall count of Backlogged, New, and Completed (Tasks or Projects)

- The total difference between New and Completed tasks or projects (Change)

- The percent of tasks or projects that were completed on time

- The percent of tasks or projects that were completed on or under budget

Task Trends

This tab contains multiple charts that present different views of the following task related data: Opening Backlog, Completed Tasks, Tasks Completed On Time and Budget, Projects Managers (by overdue or overestimate tasks), and Tasks by Line of Business.

For details, refer to .

Project Trends

This tab contains multiple charts that present different views of the following data at the Project level: Opening Backlog, Projects Completed - Above or Below Budget, Projects Completed - Before or After End Date, Projects By End Date (Due) - Above or Below Budget, and Projects By End Date (Due) - Before or After End Date.

For details, refer to .

Explore Tasks, Projects, and Overdue Projects

These three powerful and flexible interactive worksheets let you filter data to gain further insights into what drives your task and project trends. Each tab has nine or more charts and multiple slicers so you can filter down to the details you need. Below the charts, there is a list of the individual projects or tasks included in the filtered results. When no filters are applied, the worksheets reflect all data for the 10 weeks previous to the last data refresh.

Key Metrics for Explore Tabs

On the Explore tabs, you can scan the following critical high level metric at the top left corner of the tab. These metrics reflect the filtered data .

- Explore Tasks displays the current count of Projects and Tasks.

- Explore Projects displays the current count of Projects and Remaining Hours (based on project and task estimated hours)

- Explore Overdue displays the current count of Projects, Remaining Hours (based on project and task estimated hours), and Tasks

Slicers

Across the top and down the right side of each tab, nine or more different slicers let you filter the data by various criteria. The slicers differ between tabs.

Explore Tasks

On this tab, 13 charts display task counts filtered by one task related category, for example, due date, assigned resource, project type, or task status. Four additional charts display task data related to resources and clients. You can use slicers to filter the data and focus the charts, for example, if you want to view information for a specific project type, of line of business, or date.

For details, refer to "Explore Tasks, Projects, and Overdue Tasks" on page 180.

Explore Projects

On this tab, 15 charts display project data by different project related categories, for example, end date, start date, and percent complete. You can use the slicers to filter the data and focus the charts, for example, if you want to view information for only completed projects or overdue projects.

For details, refer to "Explore Tasks, Projects, and Overdue Tasks" on page 180.

Explore Overdue

This tab focuses on your overdue tasks so you can quickly get a sense of where things are falling behind, what you need to keep an eye on, where you may need to step in. There are nine charts that display data about overdue tasks, and two tables that list the top ten resources, or top ten projects, with the highest count of remaining task hours. You can filter the data to focus the charts on overdue tasks in a specific area, for example, overdue tasks from a specific project or assigned to a specific resource.

For details, refer to "Explore Tasks, Projects, and Overdue Tasks" on page 180.

Data Analysis Tabs

The Task Analysis, Project Analysis, and Backlog Analysis provide a spreadsheet view of all the data downloaded for use in the Project graphs and charts. 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.

On these tabs, you also set your targets for key task and project metrics and you can also change some key metric labels, and even the metrics selected for display. Refer to "Customizing Your Data Display" on page 13.

Task and Project Analysis Tabs

These two tabs contain, in spreadsheet format, all the task or project data that drives the Task Trends and Project Trends charts. Data is grouped by Opening Balances, Items Started, Closed, and Due. 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. Sparklines summarize the data for each line. Refer to "Data Analysis: Task, Project, and Backlog Tabs" on page 189.

Backlog Analysis Tab

This tab contains backlog data by assigned project lead and resources, in spreadsheet format and grouped by Open Tasks, Overdue Tasks, Tasks Due, Tasks Closed - Last 7 Days, Balances, and Quality - Last 14 Days (Completed, On Time and Overdue) Each group is sub-totaled. Refer to "Data Analysis: Task, Project, and Backlog Tabs" on page 189.

Viewing Key Project Metrics

The projects Metrics worksheet tab includes 10 key project and task metrics that were selected to provide an overview of the current state of your company's projects. You can set targets for each metric and then quickly see where you are meeting or not meeting those targets.

		This Week	Last Week	2 Wks Ago	10 Week	10 Week	Target
		6/1/2014	5/25/2014	5/18/2014	Trend	Met Plan	
Open Projects		35	32	33			< 35
Due Tasks		17	31	25			< 50
Overdue Tasks	●	326	300 ●	304			< 300
Tasks Completed		-	5	32			< 400
Task Open Balance	●	344 ●	321 ●	323			< 250
Tasks Created		19	28	27			< 40
Estimated Hours Tasks Created		39.8	31.0	185.0			1
Total Hours Worked	●	0 ●	8.50 ●	52.25			> 100
Avg Overage (Days)	##	N/A ##	N/A ●	22.9			< 4
% of Tasks Completed Ontime	##	N/A ●	0% ●	9%			> 0.7

For each metric you can instantly see the following:

- Values for the previous three weeks.

- Red icons where a metric has failed to meet its target

- A sparkline graph that shows the overall trend for the previous 10 weeks.

- A sparkline bar chart that shows where the target was met or missed for the previous 10 weeks. Green indicates the target was met, red indicates a missed target.

- The target specified for each metric.

For information on setting targets, refer to "Data Analysis: Task, Project, and Backlog Tabs" on page 189.

For information about changing labels and changing which data displays, refer to "Customizing Your Data Display" on page 13.

Task Trends

This tab provides information on project task trends over the previous ten weeks. It contains eighteen charts grouped into five categories of task related data. Each chart displays a different aspect of the data from that category. The key metrics at the top of the page give you a quick overview of the current status of project tasks.

The Project Trends tab provides project specific data. Refer to "Project Trends" on page 175.

More detailed descriptions of individual charts will be available at a later date.

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

Opening Backlog
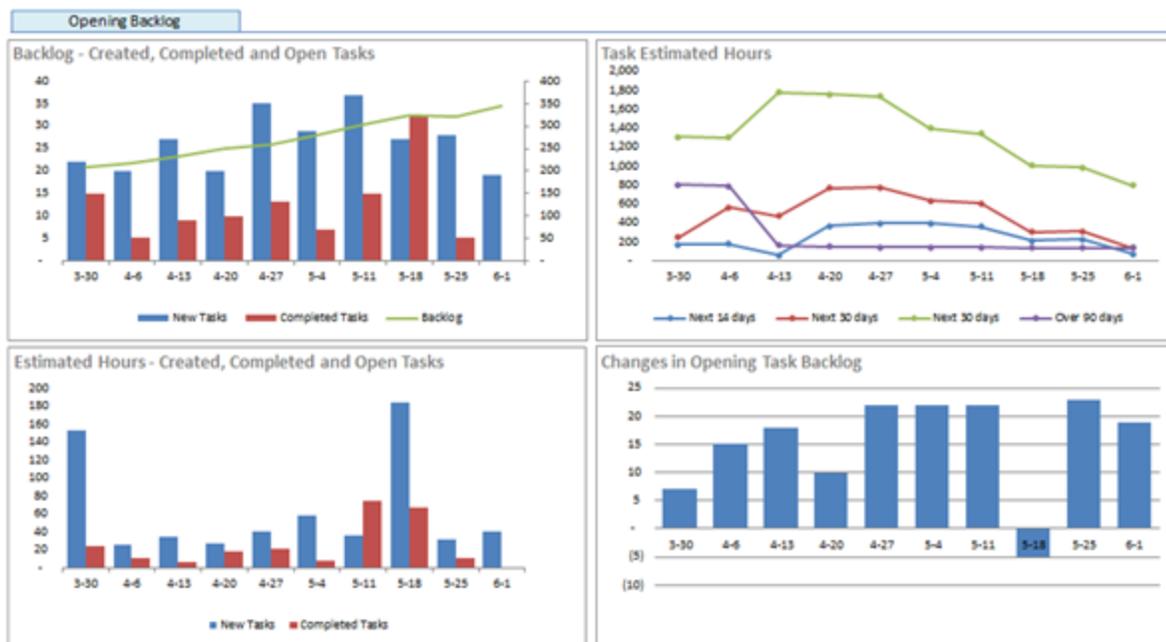
It's important to monitor trends in your task backlog, both on a day to day and long term basis. Is the backlog changing, or staying steady over time? How does the number of open tasks compare to the number of hours estimated for those open tasks? And, if you look at the Task Estimated Hours chart, how many estimated hours remain on tasks due within the next 2 weeks? Are some projects contributing more to the task backlog than other projects? If so, you'll want to know why. If you have been taking steps to address a growing backlog, can you see the results over time?

Completed Tasks
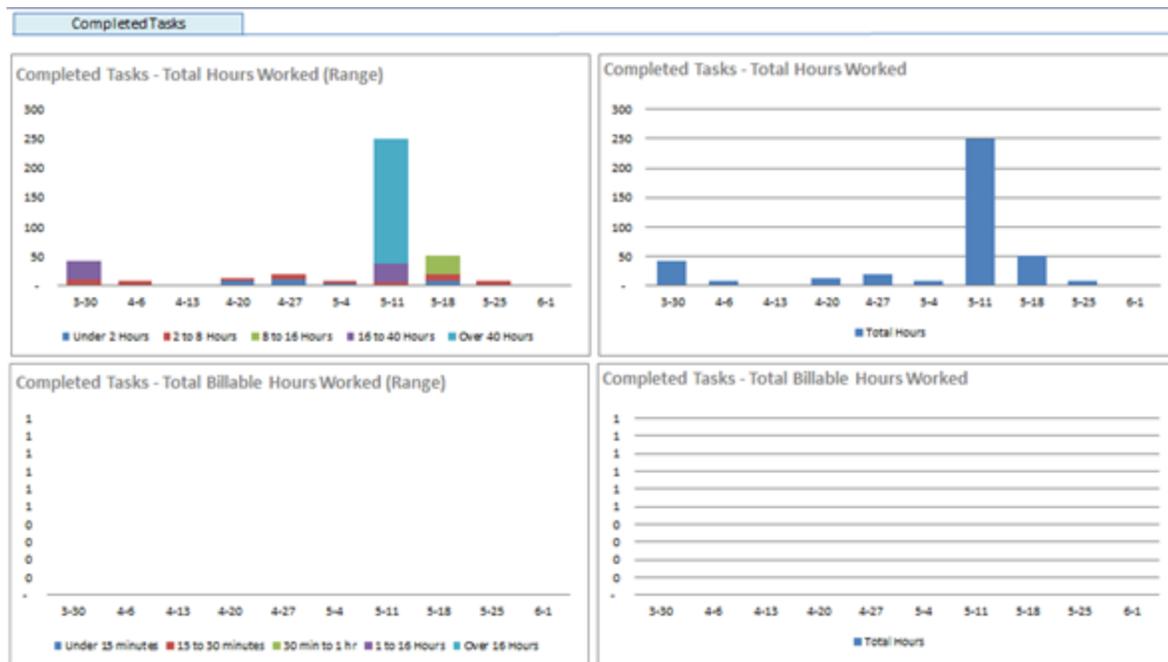
See how many hours were worked on tasks completed in the previous 10 weeks. How many of the total hours were accrued by tasks that required over 40 hours of work, vs under 8 hours of work? If you have a spike in hours for one week, it may be because a few tasks were completed that required a large number of hours. If an increasing number of hours are recorded for individual tasks, it might be worth looking into. Are these tasks also running over estimate and over budget? If not, it might still be worth while exploring whether the tasks should be broken down into smaller, more manageable tasks.

If you bill directly for task hours, you can see how many billable hours have been worked over the same time frame, and compare that to the total hours worked.

The data for the demo workbook used for the image above does not include billable hours data for tasks.

On Time and Budget

Unlike tickets, tasks are often ongoing and cover a large number of estimated hours. Often it's more useful for project management to know whether tasks are completed on time and within budget than how many hours were logged. This section offers a variety of ways to analyze how successfully your project managers are in meeting your task time and cost estimates. Although an unusual spike or dip usually has a reasonable explanation, you should still check into it. Often the answer is in the next chart.

For example, the "Overdue Tasks Completed - Average Overage Days" chart shows an unusually high overage (22.9 days) on May 18. If you look at the next chart, "Overdue Tasks Completed - Overage Ranges", you'll see that on May 18 only three overdue tasks were completed, but the overage for each of those tasks was more than 5 days.

Project Managers
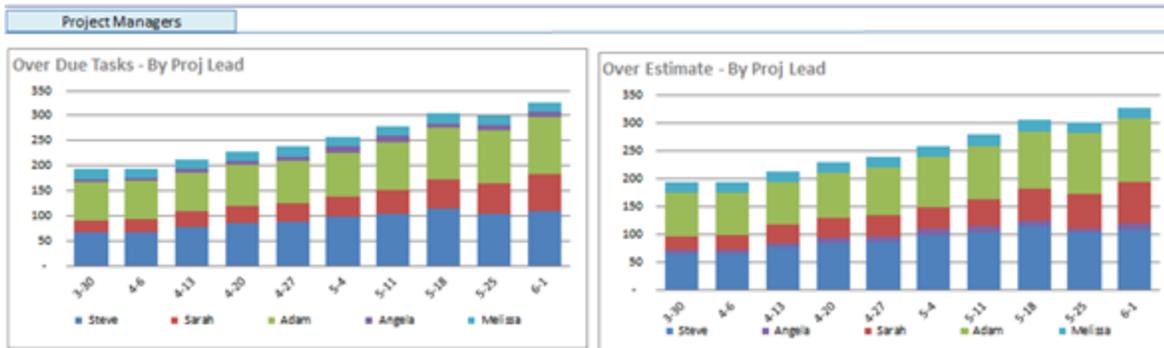
The two charts in this section break down overdue and over estimate tickets by project lead (manager). You can see how well different managers are doing in meeting deadlines, and how they compare with the other project managers. Be aware that these charts don't reflect the overall number of tasks that each manager is responsible for. A low number of task for one manager on either chart might indicate a low number of projects assigned. But if there is a consistent change over time, for example, if the number of overdue or over estimate tasks begins to creep up steadily for one manager, especially if the figures remain steady for the other managers, you should investigate further.

Tasks by Line of Business
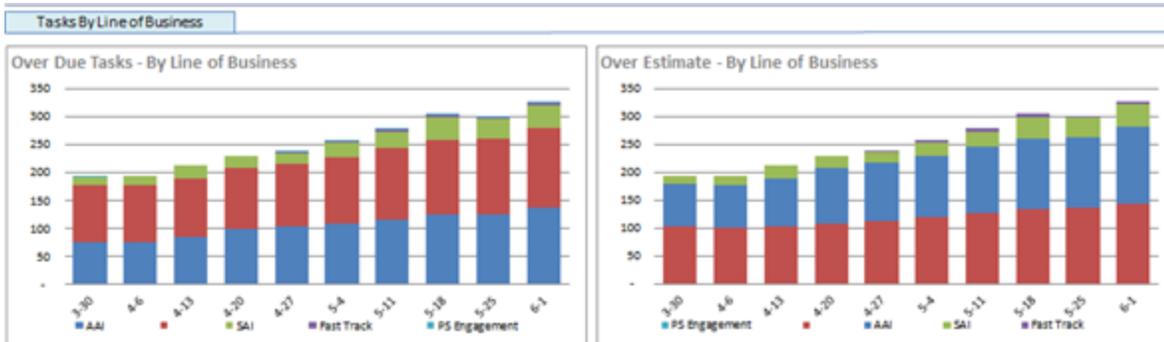
These two charts look at overdue tasks and over estimate tasks by line of business. Knowing whether projects in some lines of business consistently cause tasks to be overdue or overestimate can help you plan future projects in these areas. And if there is an upward trend in one line of business - you should look into it. It might just be from one particularly difficult project, or it might signal a chronic issue, like insufficient resources with expertise in that are of business.

Project Trends

This tab provides information on project trends over the previous ten weeks. The 28 charts on this page are organized into five categories or project related data. The key metrics at the top of the page give you a quick overview of the current status of your company's projects.

For Task data, refer to "Task Trends" on page 171.

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

Opening Backlog

As with tasks, it's important to be aware if and when you start to fall behind in the completion of projects, and why. These four charts give you different perspectives on your project backlog. You can compare new projects to completed projects by week, and follow the impact that has on backlog. You can view your backlog by project type to watch for changes in one compared to the other. See how your estimated hours for new projects compare to completed projects by week, and monitor changes in the backlog by week.

If your backlog is growing, are your teams falling behind in meeting deadlines? If so, why? Or are you adding new projects faster than you can complete current projects? If so, is that temporary, as you finish up a few projects nearing their end? Or will you need to bring in more resources to handle the growing work load?

Projects Completed - Above or Below Budget

Autotask Professional Services Automation

Projects By End Date (Due) - Above or Below Budget

In these six charts, you can follow how well you are doing with meeting your estimated project budgets. It would be great if, like the "company" that produced the data in these charts, all of your projects came in below budget! There is nothing in the "# Projects Over Estimate", "Average Hours Over Estimate", or "Project Hours Over Estimate" charts. But realistically, all companies at some time will see data there.

What you don't want to see is purple or turquoise lines in any of these charts - at least not consistently over time: purple = 40 to 80 hours over estimate and turquoise = more than 80 hours over. Of course, if you consistently have high numbers of projects that are running over budget, you need to dig deeper and find out why. But even if only one project is behind and over estimate, follow up on it. One large project over estimate can cost more than multiple small projects over estimate.

Projects Completed - Before or After End Date
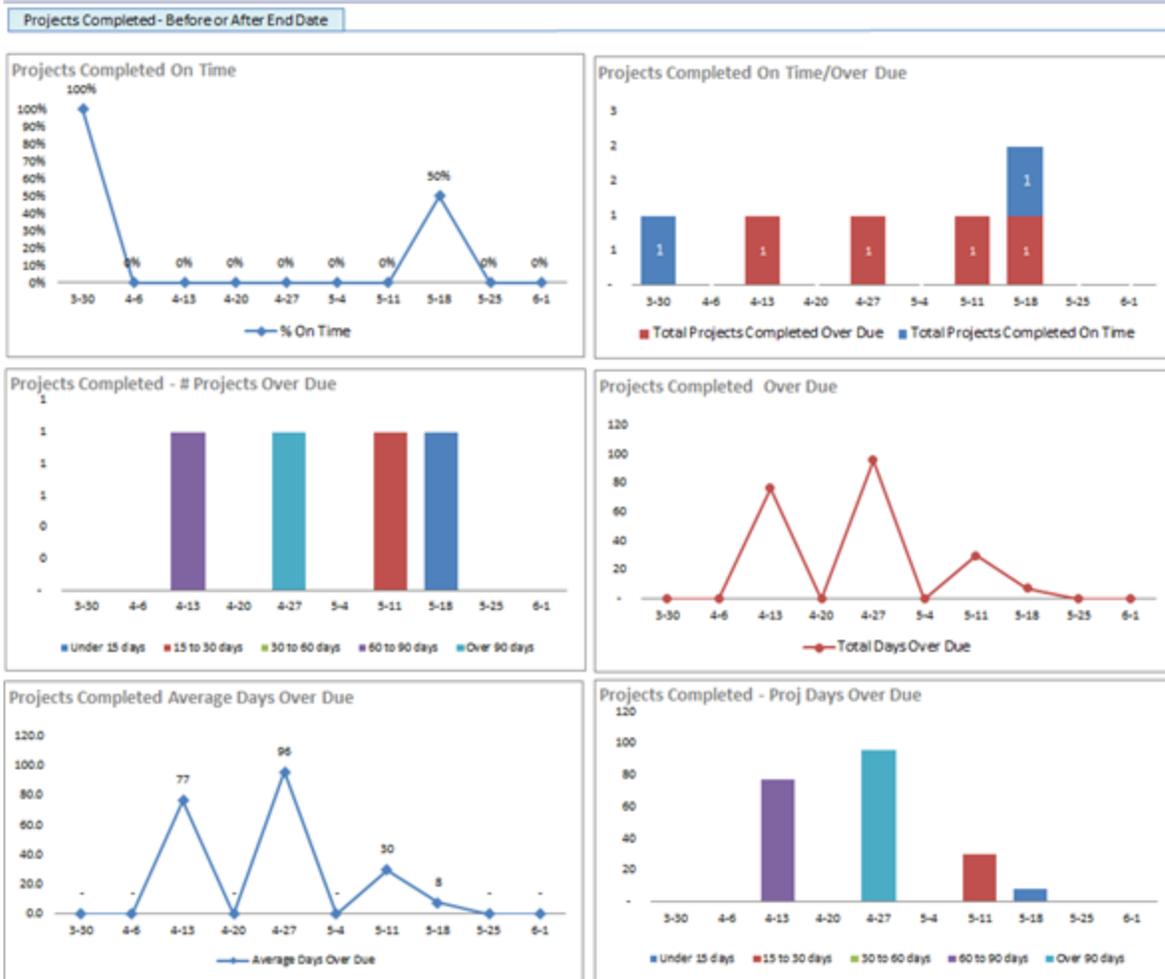
This section looks at projects completed in the last 10 weeks and displays data about projects completed before and after due date. You can monitor the percentage of your projects completed on time and compare the number completed on time and overdue.

Since there's more concern for overdue projects, four of the charts break down the overdue projects to display the number of projects overdue by week and where they fall in the range of days overdue. You can also see the total days overdue for completed projects and the average days overdue for projects completed each week. Overdue projects are more likely to require extra work and therefore can run over budget. And, overdue projects can impact resource availability for upcoming projects.

Projects by End Date (Due) - Above or Below Budget
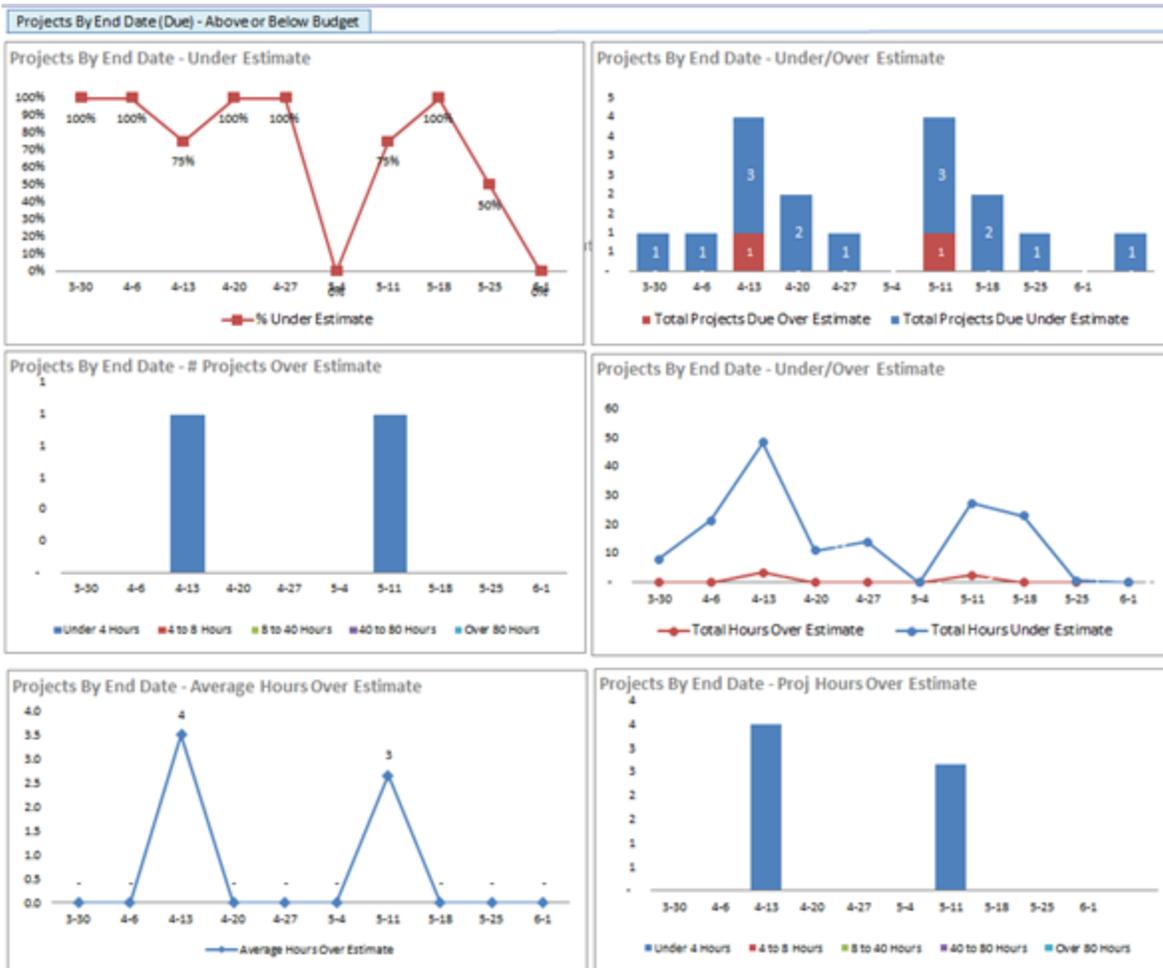
It's also important for you to monitor projects that are not yet complete that were due in the last 10 weeks to see what impact this is having on budgets. It's possible for a project to be past due date and still under budget, especially if there was some delay that prevented resources from logging time on the project. But more than likely, if you are past due date, you are close to or already over budget.

If you see that you have overdue projects that are still under budget, you may be able to take steps to keep them within budget. If they are already over budget, you'll want to complete them as quickly as possible while keeping costs low.

Projects by End Date (Due) - Before or After End Date
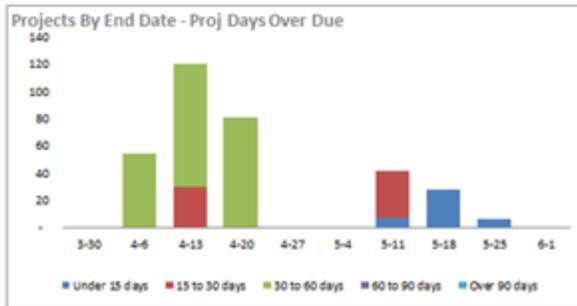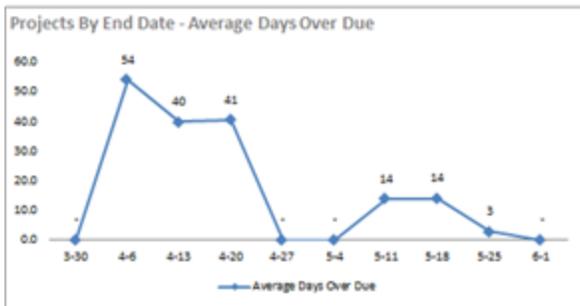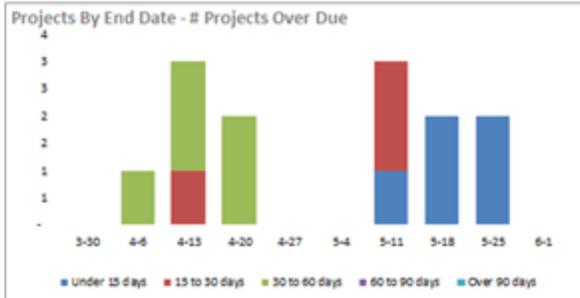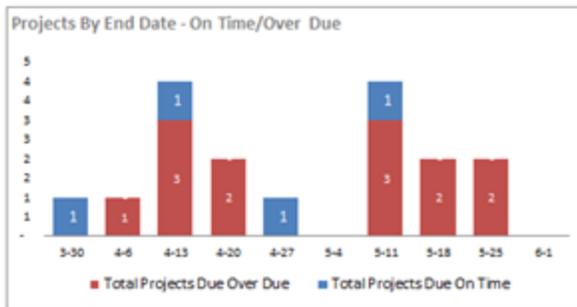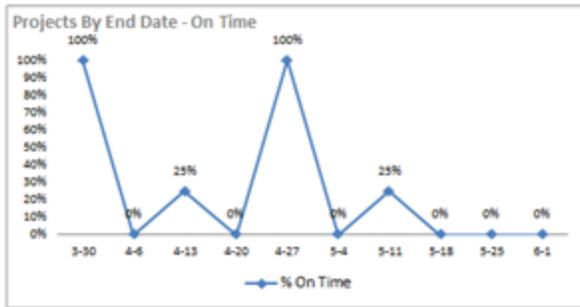
The final six charts on the Project Trends tab look at projects with end dates in the last 10 weeks. First the good news - you can see the percent of projects due each week that were completed on or before due date. You can then see how many projects were completed on time compared to those overdue. Still good news if you see more blue (total projects due and on time) than red (total projects due and over due).

For the overdue projects, you can see how many projects due each week are overdue. Additional charts give you more details about the number of overdue projects, for example, how many projects fall within the same range of days overdue, the total days overdue for all project due each week and the average number of days overdue for projects due each week.

The last chart provides the total number of days overdue for projects by end dates, and then shows how many of the over-due hours came from projects under 15 days overdue, 15 to 30 days overdue, 30 to 60, and then 90 days overdue. This helps you dig a little deeper into where your overdue days are coming from. If you show a high number of project days over-due for one week, are those hours coming from projects running 30-60 days overdue? Or 60 to 90 days? Or, maybe a num-ber of projects ended and all were under 15 days overdue.

Explore Tasks, Projects, and Overdue Tasks

The **Explore Tasks, Projects, and Overdue tabs** are interactive worksheets where you can drill down further into your task, project, or overdue task data.
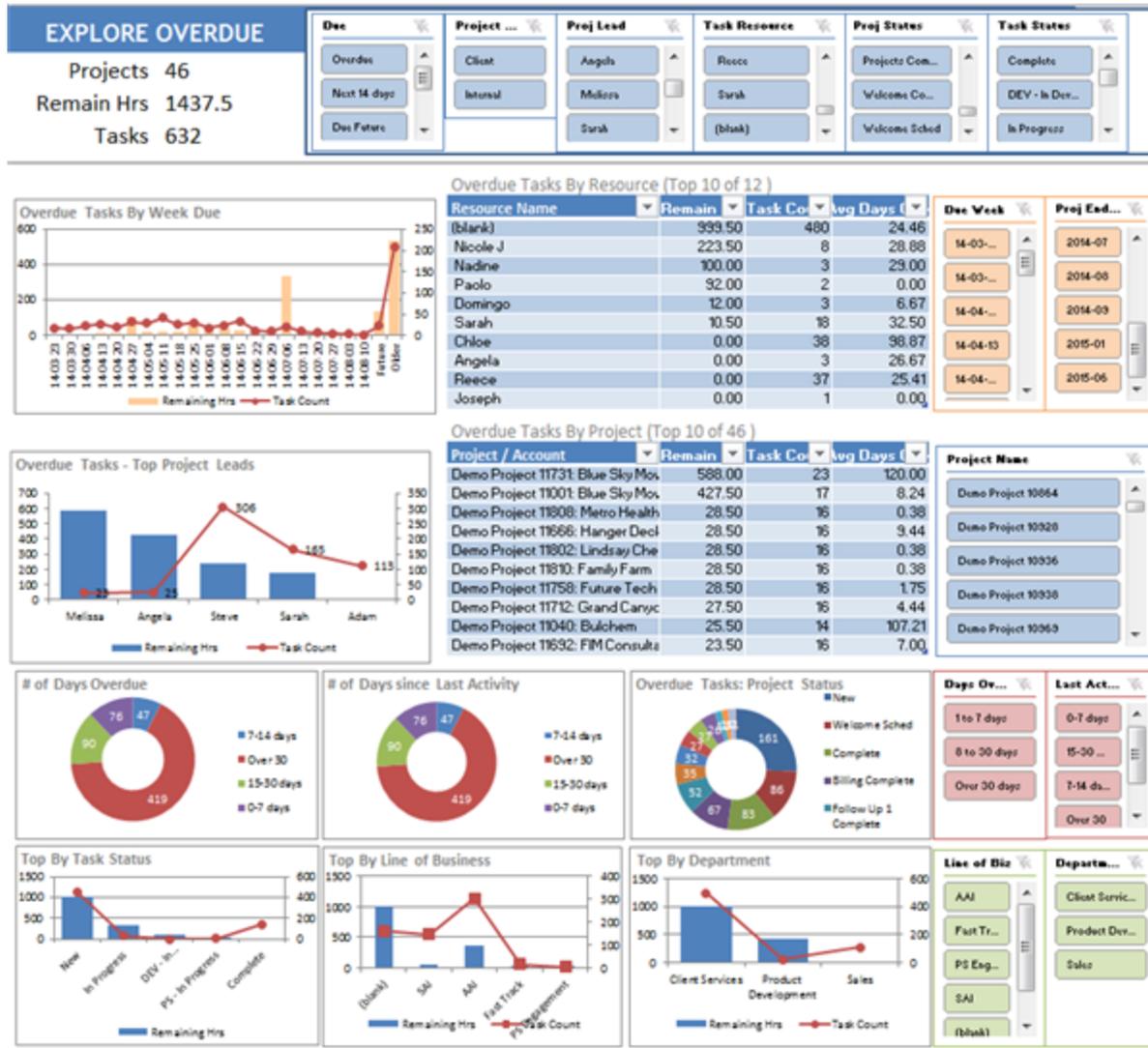
Explore and Research

These worksheets include slicers that filter the task and project data so you can find out what's behind the trends you see in the Project and Task Trends tabs. For example, on the Tasks Trend tab, if you see an unexpected spike in overdue tasks due the week of June 8, you can dig deeper in the Explore Overdue Tasks tab.

Filter on overdue tasks and the week of June 8. Then, check the charts to find out important details. How many remaining hours are associated with the overdue tasks? Maybe the remaining hours are very low because the resources have not yet finished some minor details and closed out the tickets. That shouldn't have too great an impact on the projects, unless those tasks are holding up other work. If the number of remaining hours is high, you'll want to know what projects, project leads, and resources are associated with the overdue tasks, and how long it's been since work was done on the tasks. Are

the remaining hours associated mostly with one project or resource, or are there a number of different projects with over-due tasks? Are the tasks still being worked on regularly, or have they been put aside? And are there any tasks overdue because no resource was assigned to them?

You can also use these tabs to quickly research project related questions. What accounts have open projects? Which projects are different resources assigned to? What is the differential between actual project hours vs estimated project hours for all projects, one project, or all projects for one account?

Key Metrics

The upper left corner of each explore tab displays two or three key metrics. These key metrics reflect the filtered data on the tab. When no filters are applied, these metrics and all the data on the tab represent all data from the data cache download, for 10 weeks prior to the most recent data refresh.

Filter with slicers

Each tab has multiple slicers. Slicers are easy to use filters you can apply to data on the Explore tabs.You can combine as many slicers as you need to focus on the data you want.

View a list of all tasks or tickets in the filtered data

Below the charts, a table lists all the projects or tasks included in the filtered data. The list updates immediately when you apply or remove filters. The list includes details for each task or, for the Projects tab, each project.

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

How to Explore

Review the available charts and filters. Most slicers (filter controls) appear across the top of the page and down the right side of the page, except for the Overdue Tasks tab . On that tab the Accounts slicer is below the charts, just above the task and projects list.

Decide which filters will focus in on the data that will be most useful. Then apply the filters. 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.

Explore Tasks

On the Explore tasks tab, you can focus on specific data for all tasks. You can look for underlying causes and effects of the trends shown in the Task Trends tab, or simply access data to help you make decisions and finalize management strategies.

For example, a small project for a long time customer comes up unexpectedly. The duration is short and the estimated hours are pretty low. You need to know the workload, or remaining hours, assigned to each of your teams to see if one of the teams can take on this project. You can quickly click through the Project Lead slicers to filter the by individual project leads. Then check the charts to get an idea of remaining hours for open tasks assigned to the team and the statuses of the tasks.

The Explore Tasks tab has nine slicers and fifteen different charts. There are two key metrics at the top of the worksheet, Projects and Tasks.

The Slicers

You can use the slicers to look at specific weeks, or you can choose any of the slicers to see only Completed or Open tasks, or tasks by Project Lead or task Resources. Additional filter options include Estimated hours, Overdue tasks, Task or Project Status, Created or Completed dates, and associated Project, account, or Line of Business. You can also look at Last Activity by four different date ranges.

The Charts

The first chart, Tasks by Due Week (End Date) gives you an idea of the work load for tasks with end dates that fall within the indicated weeks. You can see how many tasks have due dates within the specified week, and two line that compare the estimated and remaining hours for those tasks.
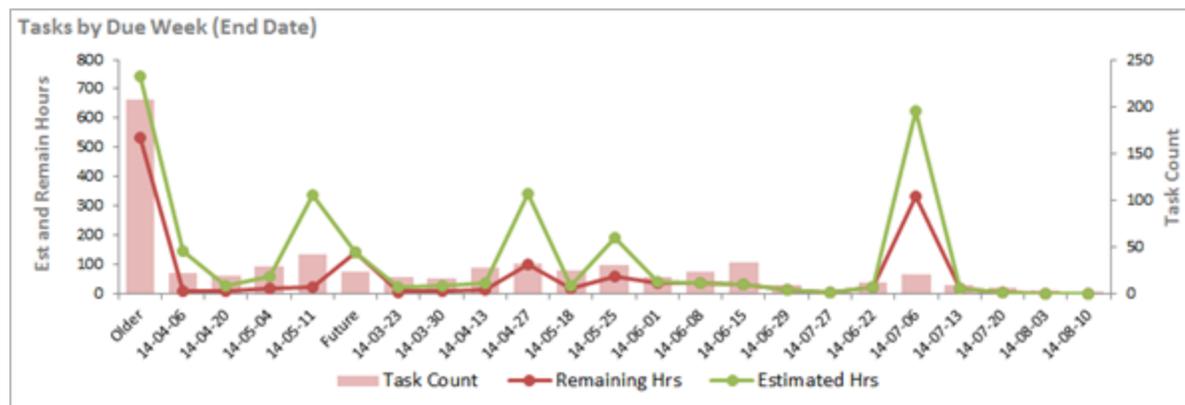
The first of the next three charts simply shows the count of tasks due. The next shows completed tasks, and breaks the data into tasks under or over estimate, or without an estimates. And the third shows where tasks fall in four different date ranges for when the last activity was logged on a task.

Autotask Professional Services Automation

Task Due

Total: 632

Tasks Completed - Estimate

- Under: 389
- Over: 22
- None: 221

Last Activity

- 7-14 days: 76
- Over 30: 419
- 15-30 days: 90
- 0-7 days: 47
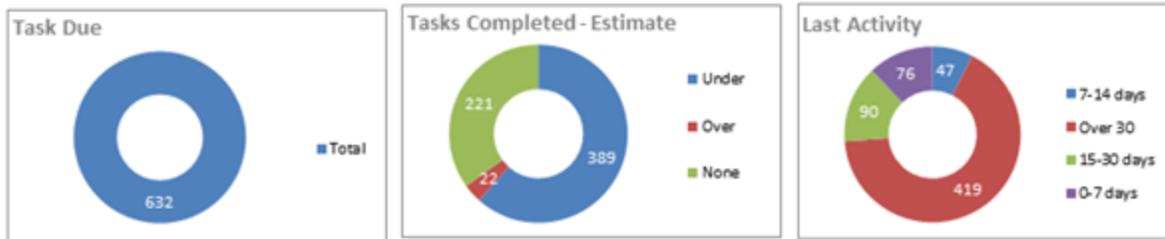
Five more charts present the top five task statuses, project statuses, lines of business, resources, and project leads by the number of tasks in each category. Additional charts provide information on tasks by project type, create week, close week, and overdue status.

Top 5 by Task Status

- DEV - In Development: 1
- PS - In Progress: 6
- In Progress: 33
- Complete: 145
- New: 447

Top 5 By Project Status

- Follow Up 1...: 52
- Billing Complete: 67
- Complete: 83
- Welcome Sched: 86
- New: 161

Top 5 by Line of Business

- PS Engagement: 3
- Fast Track: 16
- SAI: 147
- (blank): 161
- AAI: 305

Top 5 By Resource

- Sarah: 18
- Reece: 37
- Chloe: 38
- James: 38
- (blank): 480

Top 5 By Proj Lead (tasks)

- Melissa: 23
- Angela: 25
- Adam: 113
- Sarah: 165
- Steve: 306

Tasks Project Type

- Client: 584
- Internal: 48

Tasks by Create Week

Tasks by Close Week

Overdue Status

- Not Overdue: 15
- Open: 487
- Overdue: 130

The final four charts focus on resources and clients. They display the top fifteen resources or clients based on the number of assigned tasks.
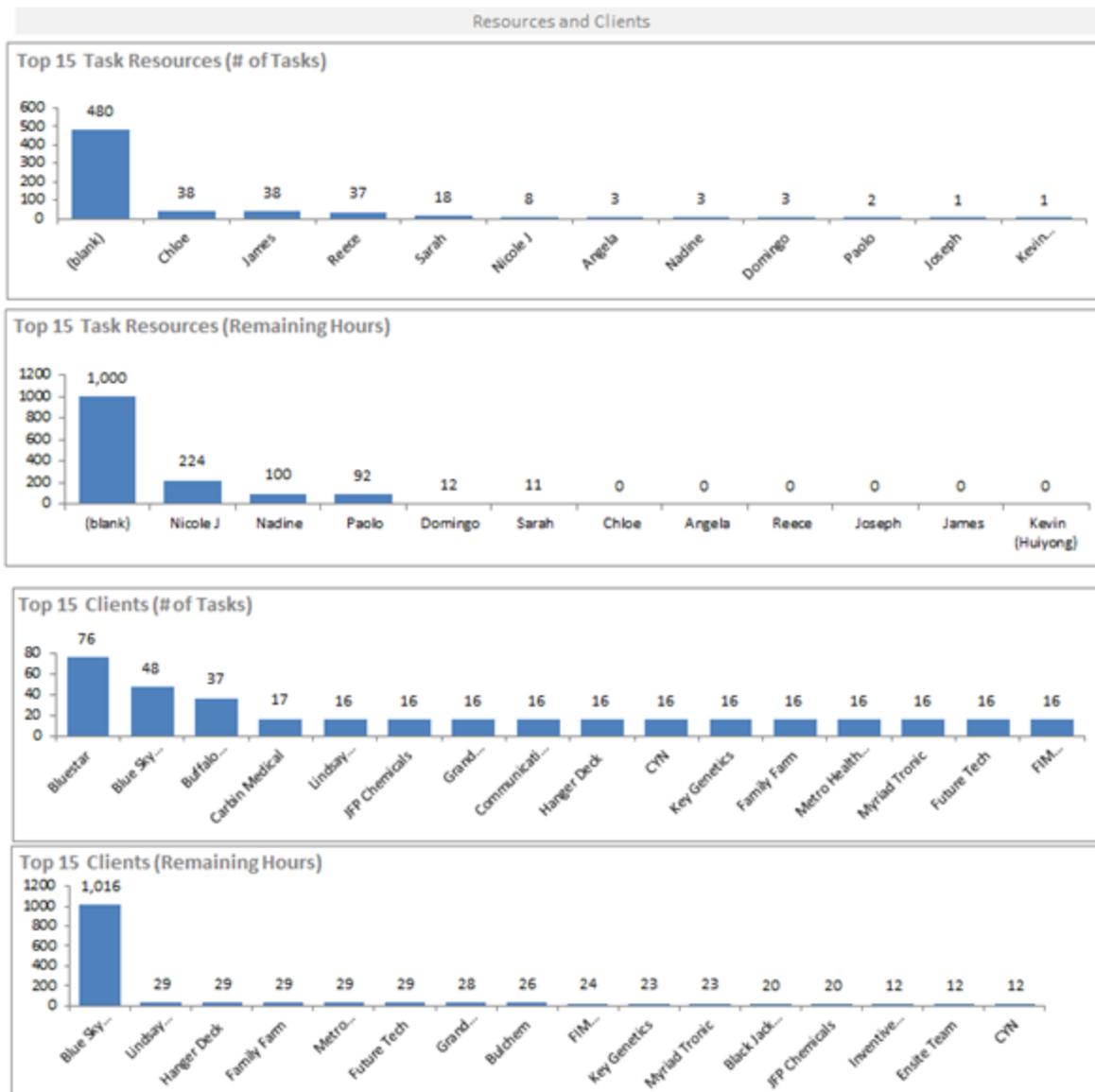
Explore Projects

While it is important to carefully monitor project tasks to be sure they are assigned, worked on, and completed on time and under estimate, you should also look at projects overall. With the Explore Projects tab charts, you can stay on top of current projects and delve into past projects to check on details in areas like project types, accounts, resources, and lines of business. You can quickly filter to view projects completed in the last ten weeks. You can then filter by overdue to check on projects that were overdue when completed. And you can look at open, overdue projects, check remaining hours, and determine the project lead for overdue projects.

The Explore Projects tab has twenty slicers and fifteen charts. There are two key metrics at the top of the worksheet, Projects and Remaining Hours. Remaining hours equals the total hours remaining for all projects included in the filtered display.

The Slicers

You can use the slicers to narrow the display to include only specific Projects, or Client or Internal projects, Completed or Open projects, projects of specified Statuses, associated Accounts, Departments, or Lines of Business. You can also filter by year, or month and year, that the project ended, or started. You can look at projects by Percent Complete or Duration, how many days Overdue they are, and when they were last Updated. And you can determine which projects are over or under estimate and, and if over estimate, by how many hours.

The Charts

The first chart presents Projects by end dates. In addition to the project count, you can see the estimated hours and remaining hours for the projects included in the count. This gives you a good overall sense of how your projects are doing at this point in time. If you see any spikes or dips in progress, you can look deeper into the specifics.

The next fourteen charts let you look at projects by different criteria important to project management.
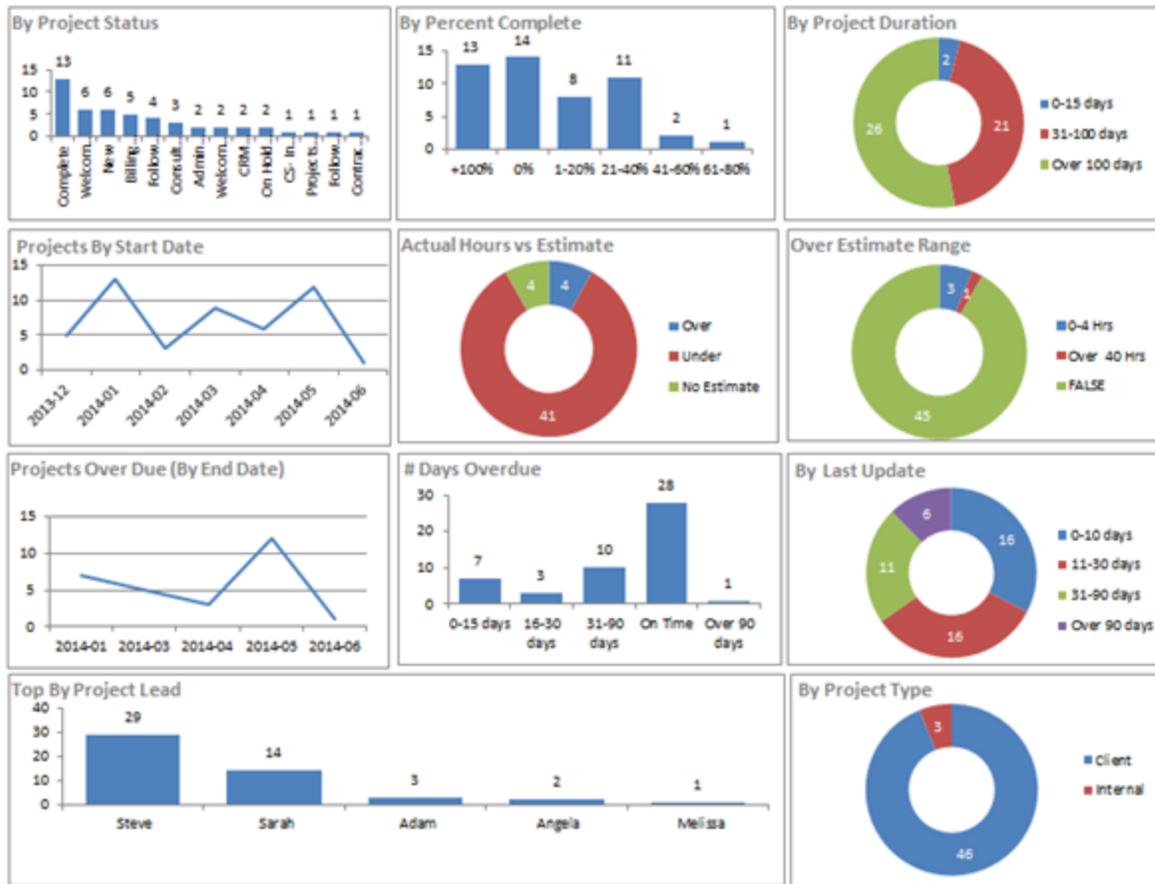
You can view project count by Status, project Type, the length of project (Duration), and how many are Complete, and how close, by percentage, the incomplete projects are to completion. View project Start and End dates. You can monitor how projects are doing in terms of Actual Hours vs. Estimated Hours, how many projects are currently Over Estimate (and by how many hours) and for overdue projects, how many Days Overdue.

Three charts display project count for the top five by Project Lead, Departments, or Line of Business. Apply additional filters to see how many, if any, of the project leads with the top 5 count for project assigned also have overdue projects and how many days overdue. Are any of the top 5 project leads overextended?

Explore Overdue

Information on all tasks and projects is critical for long term management and planning, but to keep on top of your open projects and day to day operations, you need data on what is overdue. The Overdue tab focuses specifically on overdue tasks. It's not enough to know how many overdue tasks there are, or even to know when they were due and what the estimated overdue hours are. You need to learn more about those overdue tasks to manage their completion as efficiently as possible. You need to know details.

The Explore Overdue tab has seven slicers and eight charts designed to provide useful details about your overdue tasks. There are also two tables that display the resources with the highest number of remaining hours on overdue tasks, and the projects with the highest number of overdue hours remaining. The Overdue tab has three key metrics displayed: Projects (with overdue tasks), Tasks (associated with projects with overdue tasks - not all these tasks are overdue), and remaining hours (estimated hours left on overdue tasks).

The Slicers

There are fourteen slicers on this tab. The data i s already filtered to display data on tasks that are open with a due date in the past. Starting from that point, you can filter on Project Type, Project Lead, Task Resource, Project Status, Task Status, and Account.

The Account slicer is below the charts

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You can also filter on when tasks were due by Year, Month, and Week as well as Project End date. You may also want to narrow your display to tasks overdue by thirty days, or eight to thirty or less than eight days. You can filter by last activity date to find out which overdue tasks are actively being worked on maybe you'll find that a number of tasks are not being worked on because the work is done - but the resource never marked the task as complete. Or, maybe the customer put a hold on the work for some reason. Finally, it might be useful for project planning to learn if there is any correlation between overdue tasks and the line of business associated with the project, or the department to which the project is assigned.

The Charts

There are nine charts and two tables on this tab.

The first table provides a general count of Tasks over time by the month in which they were or will be due. All tasks previous to the current month are overdue. You can see both the count of tasks and the remaining hours for overdue tasks and tasks coming due in the upcoming months.

To make a realistic assessment of the upcoming workload, the remaining hours are more critical than the number of tasks. Ten small tasks can have less impact on your resource availability than two tasks with 20 or more hours remaining.
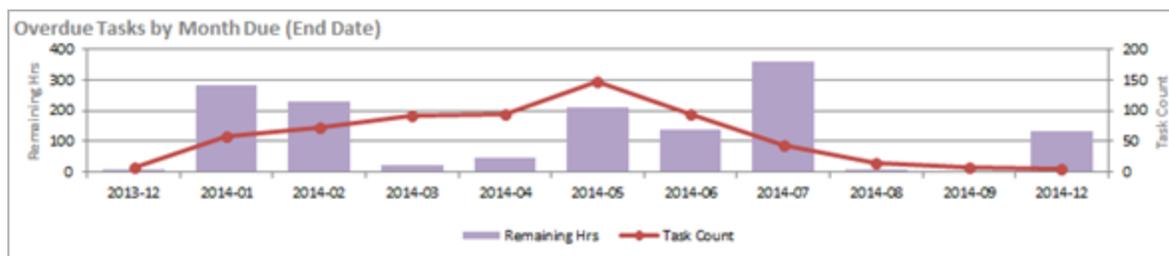
The variety of charts on the Overdue tab is similar to the charts on the Explore Tasks page. You can use them to monitor the number of tasks that were due each week over the previous weeks, or to see which five project leads have the highest number of remaining task hours. You can also view the count of tasks by Task Status and Project Status, number of Days Overdue and since Last Activity, or by Line of Business or Department. Do you see any unusual trends or spiked in any of the charts? Does one week stand out for having a high number of tasks or remaining hours overdue? Is there one project lead whose count of overdue hours is unusually high? You may then want to apply filter the data by that week or that project lead to learn more.
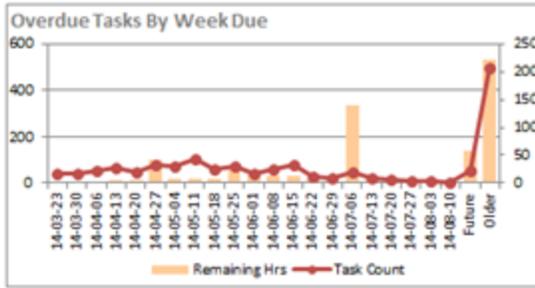
Overdue Tasks By Resource (Top 10 of 12)

Resource Name	Remain H	Task Coun	Avg Days Ov
(blank)	999.50	480	24.46
Nicole J	223.50	8	28.88
Nadine	100.00	3	29.00
Paolo	92.00	2	0.00
Domingo	12.00	3	6.67
Sarah	10.50	18	32.50
Chloe	0.00	38	98.87
Angela	0.00	3	26.67
Reece	0.00	37	25.41
Joseph	0.00	1	0.00
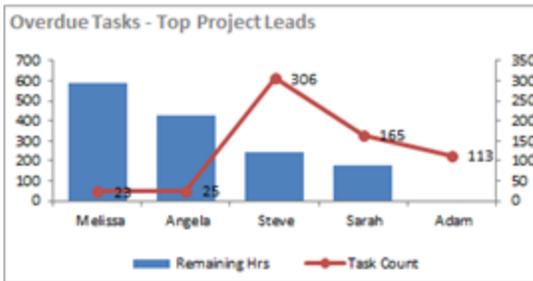
Overdue Tasks By Project (Top 10 of 46)

Project / Account	Remain H	Task Coun	Avg Days Ov
Demo Project 11731: Blue Sky Mov	588.00	23	120.00
Demo Project 11001: Blue Sky Mov	427.50	17	8.24
Demo Project 11808: Metro Health	28.50	16	0.38
Demo Project 11666: Hanger Deck	28.50	16	9.44
Demo Project 11802: Lindsay Chem	28.50	16	0.38
Demo Project 11810: Family Farm	28.50	16	0.38
Demo Project 11758: Future Tech	28.50	16	1.75
Demo Project 11712: Grand Canyor	27.50	16	4.44
Demo Project 11040: Bulchem	25.50	14	107.21
Demo Project 11692: FIM Consulta	23.50	16	7.00
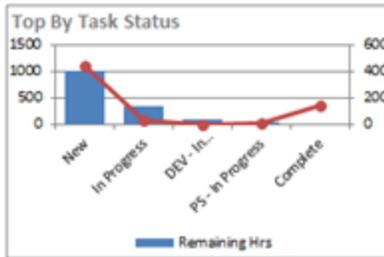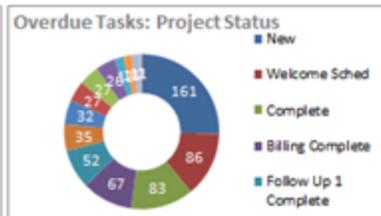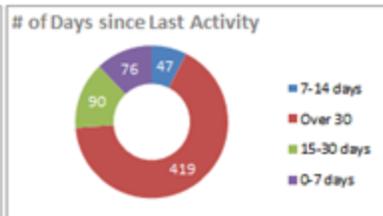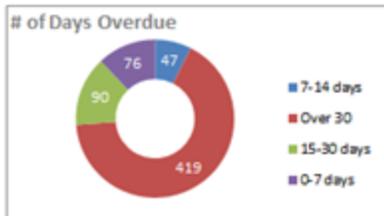
The Tables

This tab also includes two tables in addition to the main list of all tasks included in the display data. Tables provide a reference list that includes multiple details. The Overdue Tasks by Resource table shows you immediately which resources have the top ten highest counts of remaining task hours. And, if there is a line with no resource name, the number of hours and tasks on that line are not assigned to any resource.

The Overdue Tasks by Project table displays which projects have the top ten highest count of overdue tasks hours. The Project name column also displays the Account name.

Both tables display a line item count of Remaining Hours, Tasks, and Average Days Overdue. You can click a column header to access the column sorter.

Data Analysis: Task, Project, and Backlog Tabs

The Projects workbook includes three data analysis tabs: Task Analysis, Project Analysis, and Backlog Analysis. All three present, in spreadsheet form, the raw data that populates the Project Analytics workbook charts.

Task Analysis

On this worksheet you can view the raw numbers for all the data for all the tasks 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 key metrics for project task management. Selected rows from this data provide some of the raw data for the table on the Metrics that Matter tab. The Metrics that Matter tab also draws from the Project Analysis tab.

> You can, if you want, change the labels for these values. Simply click in the label cell and update.

You also set the target value and target type for these metrics on this tab. See "Setting Metric Targets" on page 191.

TASK ANALYSIS	Met Target	Week Trend	Current Week	Last Week	Prev Week	Last 4 Weeks	Prev 4 Weeks	30-Mar	6-Apr	13-Apr
Metrics That Matter						Avg	Avg			
Open Projects			35	32	33	33	24	22	22	24
Due Tasks			17	31	25	31	24	14	22	25
Overdue Tasks			326	300	304	285	219	193	195	213
Tasks Completed			-	5	32	15	9	15	5	9
Task Open Balance			344	321	323	307	240	208	217	233
Tasks Created			1900%	2800%	2700%	3025%	2550%	22	20	27
Estimated Hours Tasks Created			39.8	31.0	185.0	77.4	32.1	153.3	26.3	34.0
Total Hours Worked			0%	850%	5225%	7988%	1098%	44	9	1
Avg Overage (Days)			#DIV/0!	#DIV/0!	23	#DIV/0!	#DIV/0!	18.4	5.1	#DIV/0!
% of Tasks Completed Ontime			#DIV/0!	-	0.1	0.1	0.1	0.3	0.2	-

Additional Data

On this worksheet you can view the raw numbers for all the data for all tasks 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.

The additional data in this worksheet is presented in groups: Opening Balances, Tasks Started, Tickets Completed, and Quality, that is, Completed Tasks Overdue, Overage (number of days overdue), Over Estimate, and Estimated Hours variance, that is, the number of hours over estimate. Each group is further grouped by criteria like Queue, Source, Group, etc. and then sorted by the options available for each group.

A simple weekly trend spark graph is presented for each line and totals are provided for each group.

Project Analysis

On this worksheet you can view the raw numbers for all the data for all projects 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 key metrics for project management. Selected rows from this data provide some of the raw data for the table on the Metrics that Matter tab. The Metrics that Matter tab also draws from the Task Analysis tab.

💡 You can, if you want, change the labels for these values. Simply click in the label cell and update.

You also set the target value and target type for these metrics on this tab. See "Setting Metric Targets" on page 191.

PROJECT ANALYSIS									
	Met Target	Week Trend	Current Week	Last Week	Prev Week	Last 4 Weeks	Prev 4 Weeks	30-Mar	6-Apr
Metrics That Matter						Avg	Avg		
Open Projects			35	32	33	33	24	22	22
Projects Started			9	86	29	43	44	9	38
Projects Completed			-	-	2	1	1	1	-
Proj Completed Over Estimate			-	-	-	-	-	-	-
Proj Completed Over Due			-	-	1	1	1	-	-
Open Client Projects			3200%	2900%	3000%	2950%	2125%	19	19
Average Duration of Starting Projects			50.0	109.0	107.0	107.5	59.2	50.0	78.5
Avg Hours Over Estimate for Completed Projects			#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Projects Completed Under Estimate			-	-	2	1	0	1.0	-
% of Tasks Completed Ontime			-	-	-	-	-	-	-

Additional Data

The additional data in this worksheet is presented in groups: Opening Balances, Projects Started, Projects Completed, and Projects Due. Projects due includes sub-sets for projects under and over estimate, projects due, days over due, and completed projects over due and on time.

A simple weekly trend spark graph is presented for each line and totals are provided for each group.

Backlog Analysis

The Backlog Analysis tab is similar to the Task and Project Analysis tabs with one very important difference. Instead of viewing the project and task data over time, this table presents the data by Project Lead and Resource. For each metric, you can quickly see how many, if any, of the projects or tasks in that metric are associated with each project lead or resource.

For example, looking at Open Tasks by Department, Client Services, you can see the total open tasks associated with that department and the count of those tasks associated with each project lead and resource. This tab provides a quick assessment of total project assignments for each project lead, and task assignments for each project lead and resource. You can also easily monitor, by resource, overdue tasks, range of hours required to compete tasks, and percent of tasks completed on time or overdue.

1. To enter or remove your project leads and resources, first save a backup copy of your workbook.

2. On the Backlog Analysis tab, click the Criteria button.

3. In row 7, click the cell in the column where you want to add a name.

4. Type the name in the function field.

5. Repeat as needed for additional names.

6. Click the Criteria button and then Save.

Setting Metric Targets

On the Task Analysis and Project Analysis tabs, you set target values for key task and project metrics. Some of these metrics appear in the table on the Metrics tab. The target value appears in the chart in the Metrics that Matter table and drives the graphics that indicate whether or not you have met your target.

You also set a Type for each task or project target: Over, Under, or None.

- **Over** indicates that your goal is to meet or exceed the plan target.

- **Under** indicates that you want to stay below the target value.

- **None** applies no type.

For example, you want to keep your overdue tasks under a certain number, so, for Overdue Tasks, you would select under as the target type, because you want to stay under the plan target.

Set Target Value

1. Save a backup copy of your workbook.

2. In your workbook, click the appropriate **Analysis**tab.

3. In the worksheet, scroll to right to find the column labeled Target Type. It should be column AN, or close to AN (the worksheets can vary slightly between workbooks).

4. Scroll **down** to the row for the first set of values you want to enter.

5. In that row, click in the **Target Type** cell and you will see a down arrow.

6. Click the arrow to open the menu and select your preference: Over, Under, or None.

7. To the left of Target Type is the column labeled **Target Value**.

8. Find the metric for which you want to set the target value and click in the cell where the metric row and Target Value column intersect.

9. Enter the **Target value** for that row.

10. **Save** the workbook.

11. **Repeat** Steps 3 through 9 for each additional row to which you want to add target values.

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 9.

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

Or refer to "Add or Update an Advanced Where Clause" on page 20.

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

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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 13.

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

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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.

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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 22.

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 13.

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 195.

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 6, "Frequently Asked Questions - FAQs" on page 193, and "About the Workbooks Data Cache" on page 195.

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