Autotask Professional
Services Automation

Performance Analytics:

Projects Workbooks

Autotask®

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Welcome!

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

What is a Performance Analytics Workbook?

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

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

- Each workbook brings together core metrics for one area of your business workflow to analyze your business's trends, successes, and challenge points.

- Workbooks present data visually so you can compare and analyze at a glance.

- Workbooks are easy to set up; simply open the workbook, enter the credentials provided by Autotask, and you're ready to go.

- Workbooks are even easier to use. Click one button to refresh data directly from pre-selected Autotask Performance Dashboards Data Cache and then start scanning the charts.

- Workbooks are portable; you can work anywhere. All you need is a computer that can open an MS Excel (version 2010 or greater) file and, to update your data, a network connection. And, workbooks are compatible with Share Point and Sky Drive.

- Workbooks bring together related data on one worksheet so you can easily compare relationships and trends.

- Workbooks have some basic features that any user can customize for their own business preferences.

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

Ready to get your workbooks?

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

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

Ready to set up your new Workbooks?

Looking for information about a specific workbook?

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

Download a Performance Analytics Workbook User Guide

Need help from Customer Support?

Find out more here: "Contacting Customer Support" on page 51

Get Started with Performance Analytics

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

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

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

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

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

What You Get

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

- A Performance Analytics Workbooks file for each workbook you signed up to receive

- Credentials to access the Workbooks Data Cache to download and refresh your data

- A sample PowerPoint presentation with charts that you can link to your service desk workbooks

- A User Guide in PDF format

Requirements

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

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

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

- Workbooks Data Cache access credentials

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

- Internet access when downloading and refreshing data.

Setting Up Your Workbook

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

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

To Begin

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

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

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

2. Open a workbook file in Excel.

3. Click the **Config** worksheet tab.

Initial Setup and Configuration

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

1. On the Config worksheet, click **Setup Workbook**.

2. Enter the credentials you received from Autotask exactly as provided by Autotask: Database Server, Database Name, User ID and Password.

   Your connection information is case sensitive.

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

   If information is entered incorrectly, the setup will fail.

Autotask Setup

Connection Setup - Autotask Report Data Warehouse

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

Database Server:

Database Name:

User ID:

Password:

Advanced Where:

Next Step   Cancel

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

Set up the wbsetup.txt file as follows. Be sure to type the credentials exactly as provided by Autotask:
On line 1 of the file type your [Database Server]
On line 2 type your - [Database Name]
On line 3 type your [User ID]
Optionally, on line 4 type the [Password]
Save the files as wbsetup.txt **in the same directory as your Sales Workbook file**. The wbsetup.txt file must reside in the same directory as your workbook.

3. Optionally, enter an **'Advanced Where'** clause to selectively limit the amount of data that is downloaded. The number and type of advanced where clauses will vary depending on which workbook you are configuring. You can skip this field now and add an Advanced Where Clause at a later time. Refer to "Add or Update an Advanced Where Clause" on page 17.

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 51.

- 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 17.

Save Your Password (Optional)

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

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

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

1. In your Workbook, click the Excel **Data** menu option.

2. Click **Connections**. The Workbook Connections window opens.

3. In the **list of Connections**, click the connection indicated below for the workbook you are configuring:

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

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

4. Click **Properties**.

5. In the Connection Properties window, click the **Definition** tab.

6. Click the **Save Password** check box and then click **OK**.

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

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

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

8. For **all workbooks**, return to the **list of connections** and click "AT_WarehouseUpdate".

9. Repeat steps 4 through 6.

10. Click **Close**.

11. **Save** the workbook.

Refresh Data and View Your Charts

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

For details on the individual workbooks, refer to Using the Service Desk Workbooks, Using Client Workbooks, Using Sales Workbooks , Using the Financial Workbook or "Using the Projects Workbook" on page 21.

Refresh Your Data

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

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

1. Go to the **Home** tab in your workbook and click **Refresh Data**.

2. If you saved your password, you are done. If not, enter your password.

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

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

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

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

For more information on the workbook data, refer to "About the Workbooks Data Cache" on page 50.

There's More!

To learn about more options to customize your workbook , refer to "Take Your Workbook to the Next Level" on page 9.

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 51.

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 51.

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 19.

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 10.

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.
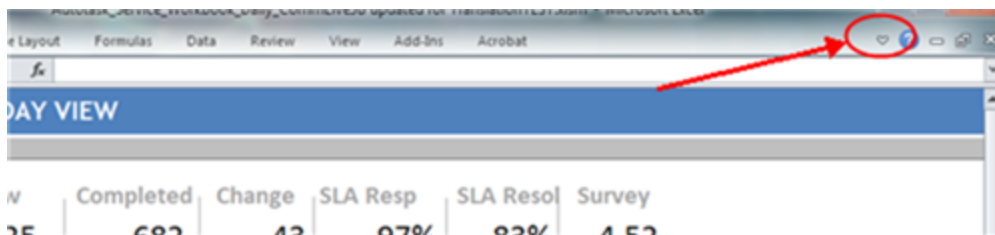

- To hide the ribbon, click the arrow again.

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.
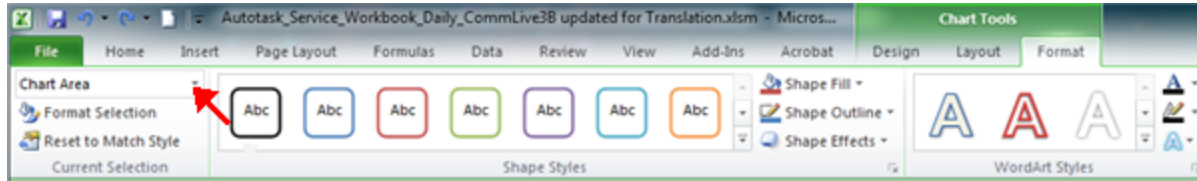
This menu does not appear in the Design ribbon.

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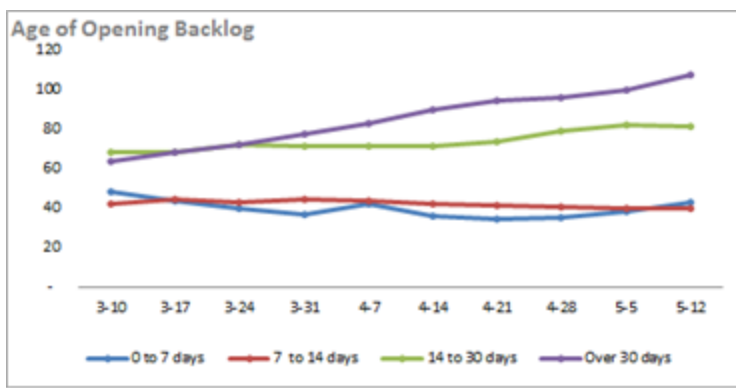
All chart ranges and data are specified on the Data Analysis tabs in each workbook: Service Desk, Ticket Analysis; Sales, CurrentFY and PreviousFY; and FinancialsCurrent and FinancialsPrevious.

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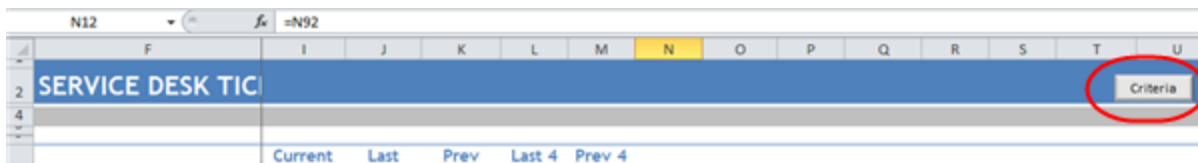
This exposes the criteria values that drive the calculations for each week (or day).

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 51.

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 work-book". To watch the video, use the link above, or enter this URL in your browser: http://www.y-outube.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 pro-visioning 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.
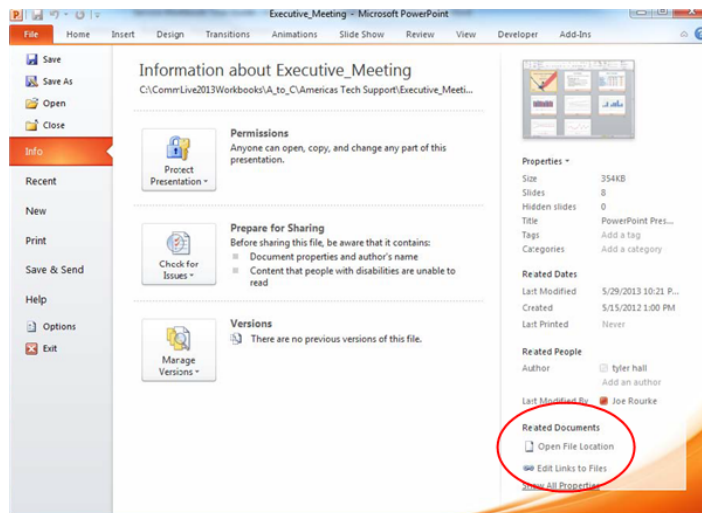
3. In the Links window, select an individual link and click Change Source.

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 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 24.

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 **"Task Trends" on page 25**.

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 **"Project Trends" on page 29**.

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 34.

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 34.

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 34.

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 10.

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 43.

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 43.

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 6/1/2014	Last Week 5/25/2014	2 Wks Ago 5/18/2014	10 Week Trend	10 Week Met Plan	Target
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 43.

For information about changing labels and changing which data displays, refer to "Customizing Your Data Display" on page 10.

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 .

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
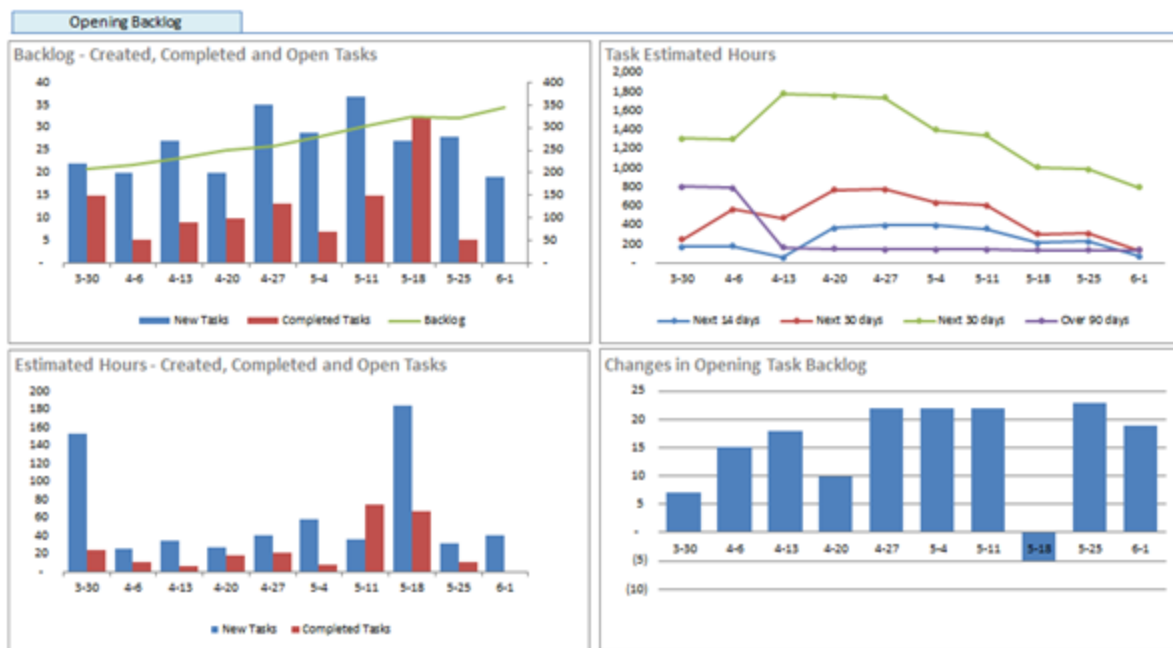
It's important to monitor trends in your task backlog, both on a day to day and long term basis. Is the backlog changing, or staying steady over time? How does the number of open tasks compare to the number of hours estimated for those open tasks? And, if you look at the Task Estimated Hours chart, how 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
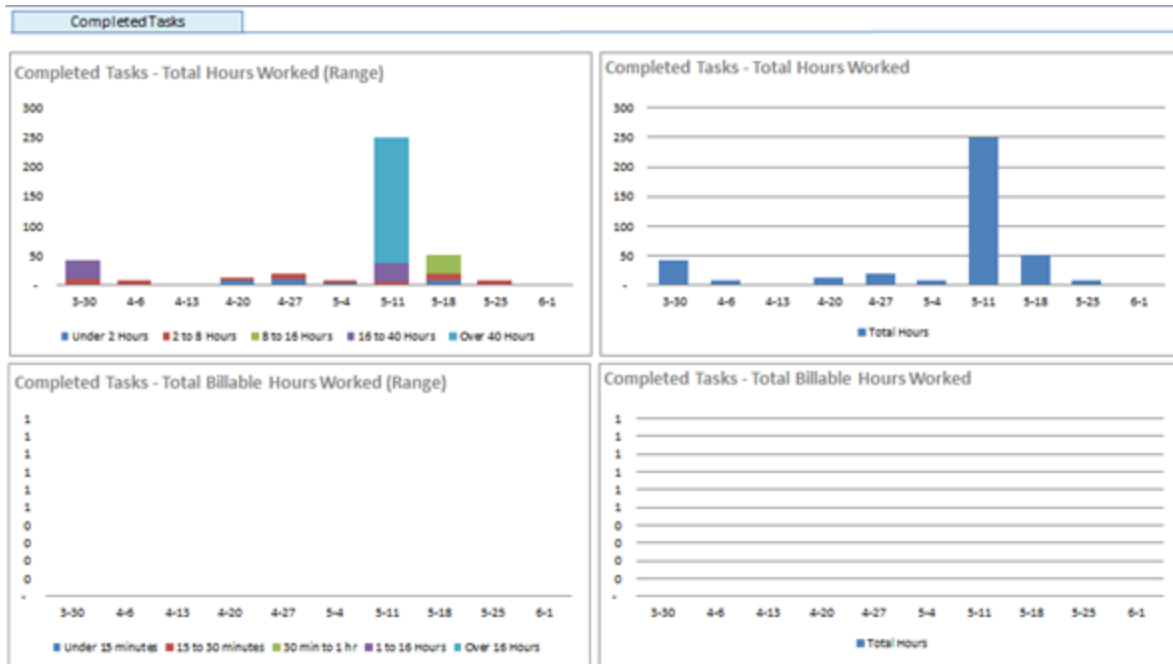
See how many hours were worked on tasks completed in the previous 10 weeks. How many of the total hours were accrued by tasks that required over 40 hours of work, vs under 8 hours of work? If you have a spike in hours for one week, it may be because a few tasks were completed that required a large number 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
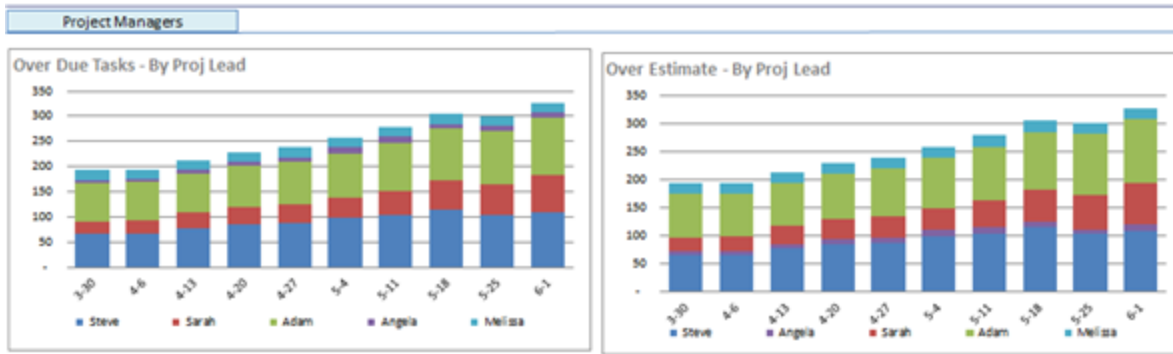
The two charts in this section break down overdue and over estimate tickets by project lead (manager). You can see how well different managers are doing in meeting deadlines, and how they compare with the other project managers. Be aware that these charts don't reflect the overall number of tasks that 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
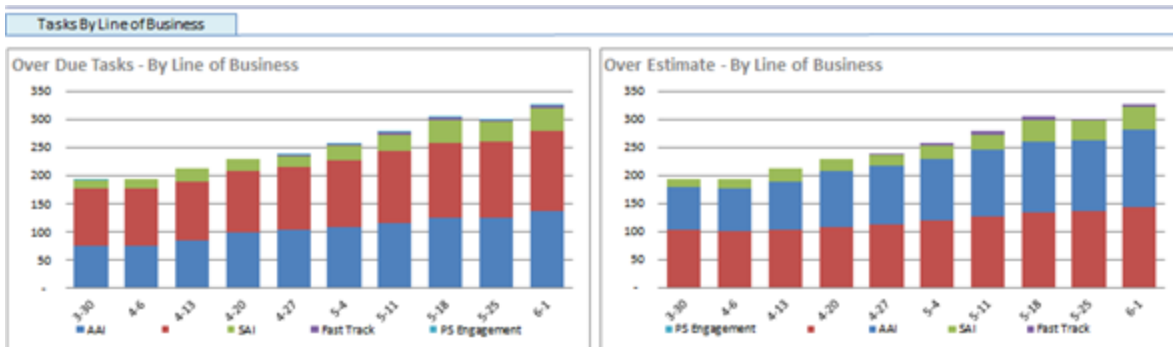
These two charts look at overdue tasks and over estimate tasks by line of business. Knowing whether projects in some lines of business consistently cause tasks to be overdue or overestimate can help you plan future projects in these areas. And if there is an upward trend in one line of business - you 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 25.

💡 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

Projects By End Date (Due) - Above or Below Budget
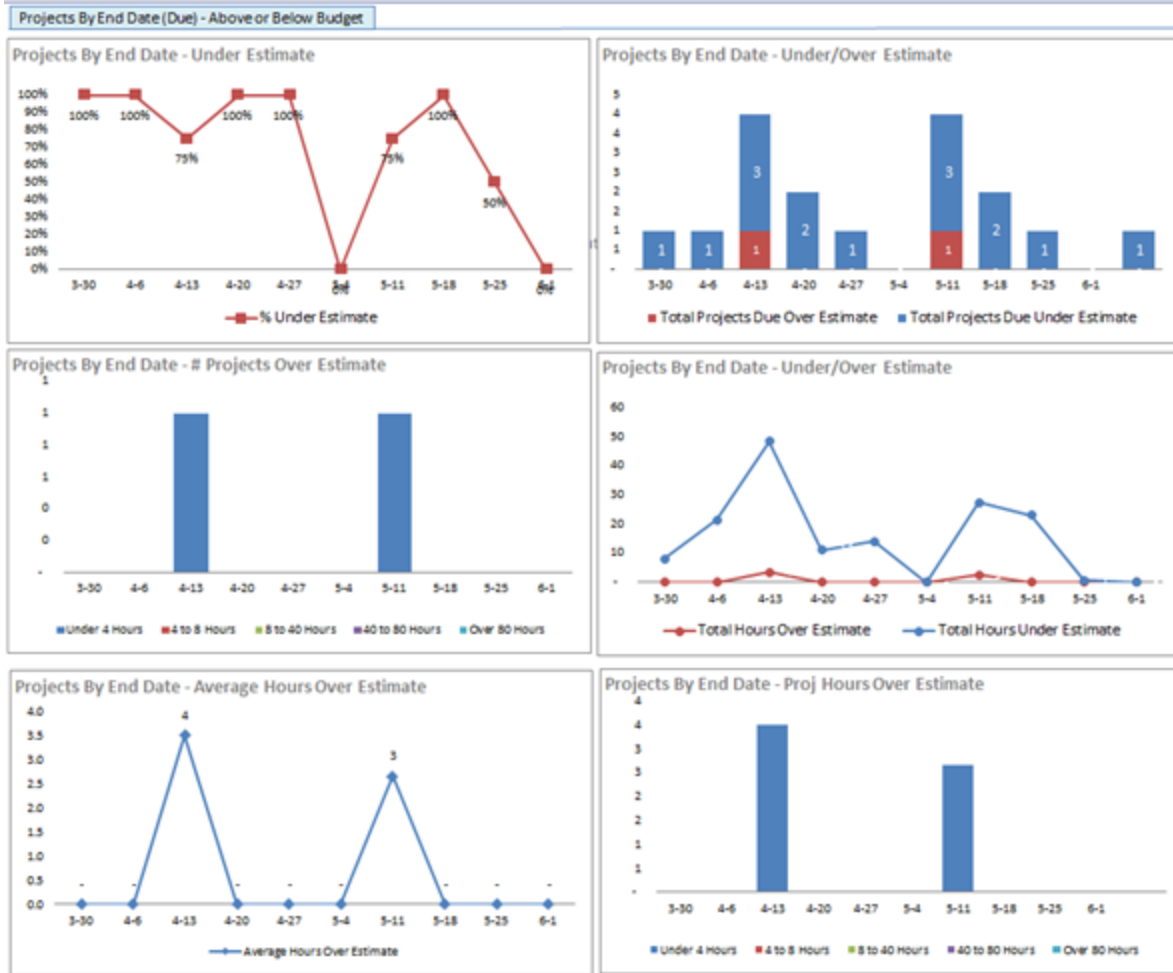
In these six charts, you can follow how well you are doing with meeting your estimated project budgets. It would be great if, like the "company" that produced the data in these charts, all of your projects came in below budget! There is nothing in the "# Projects Over Estimate", "Average Hours Over Estimate", 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

Projects Completed - Before or After End Date
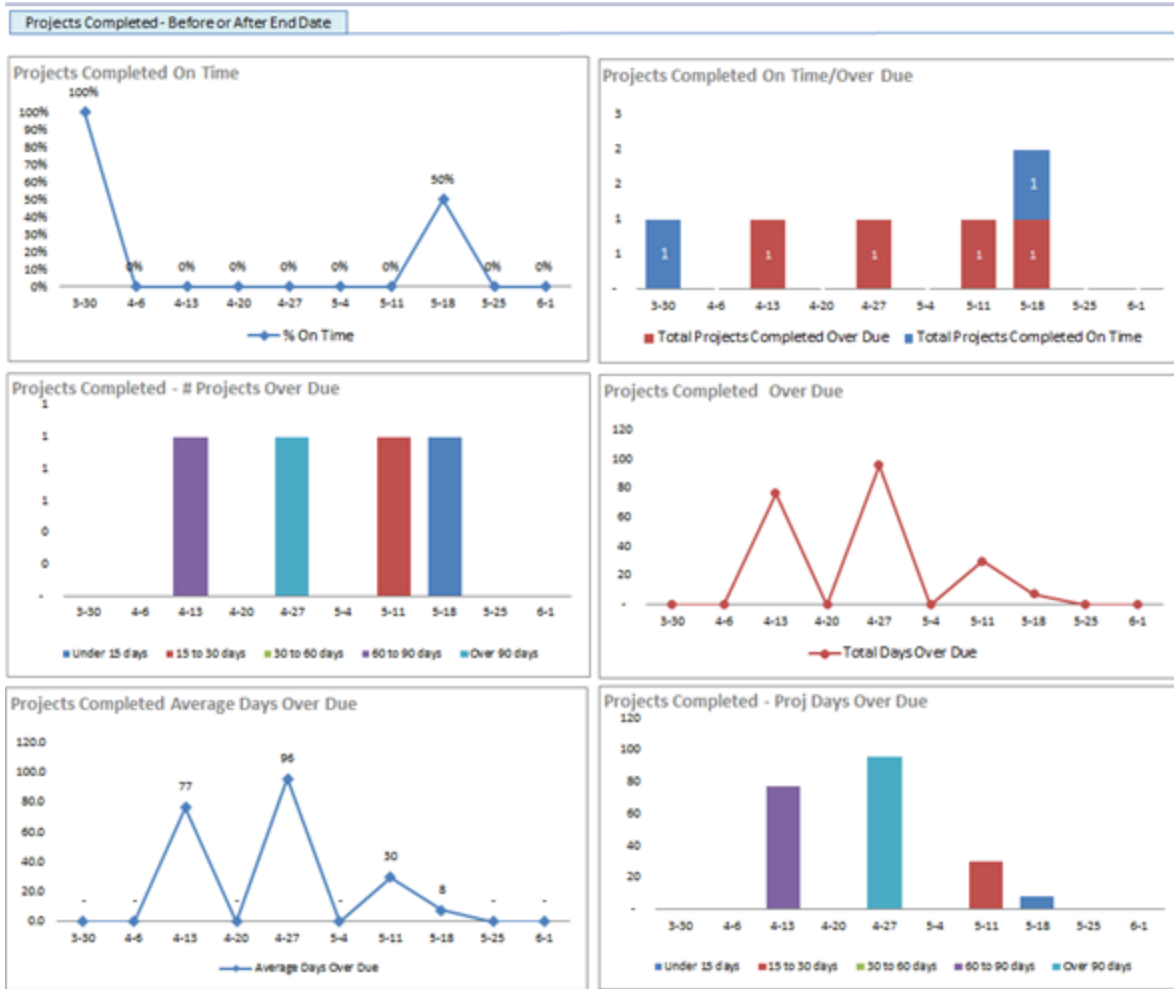
This section looks at projects completed in the last 10 weeks and displays data about projects completed before and after due date. You can monitor the percentage of your projects completed on time and compare the number completed on time and overdue.

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
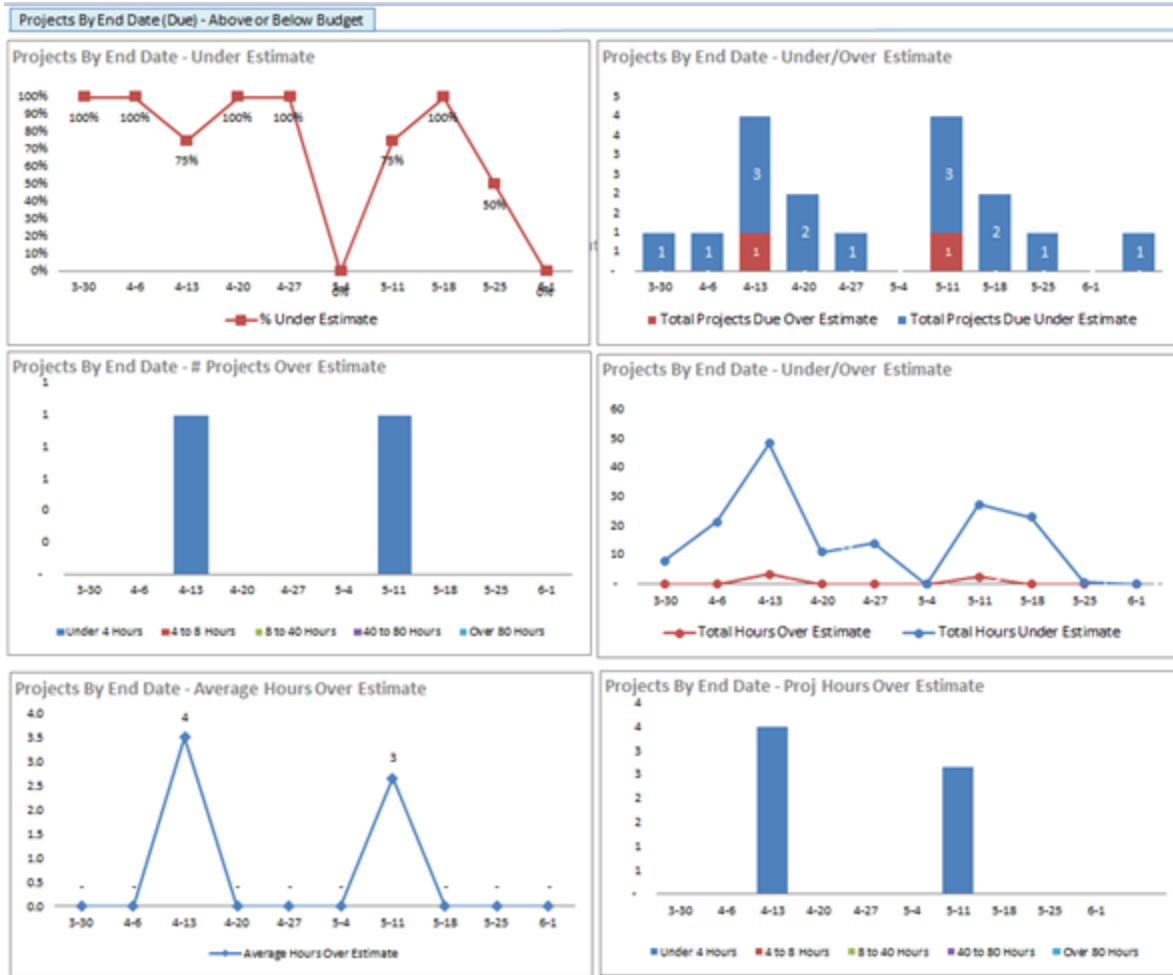
It's also important for you to monitor projects that are not yet complete that were due in the last 10 weeks to see what impact this is having on budgets. It's possible for a project to be past due date and still under budget, especially if there was some delay that prevented resources from logging time 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

Projects By End Date (Due) - Before or After End Date
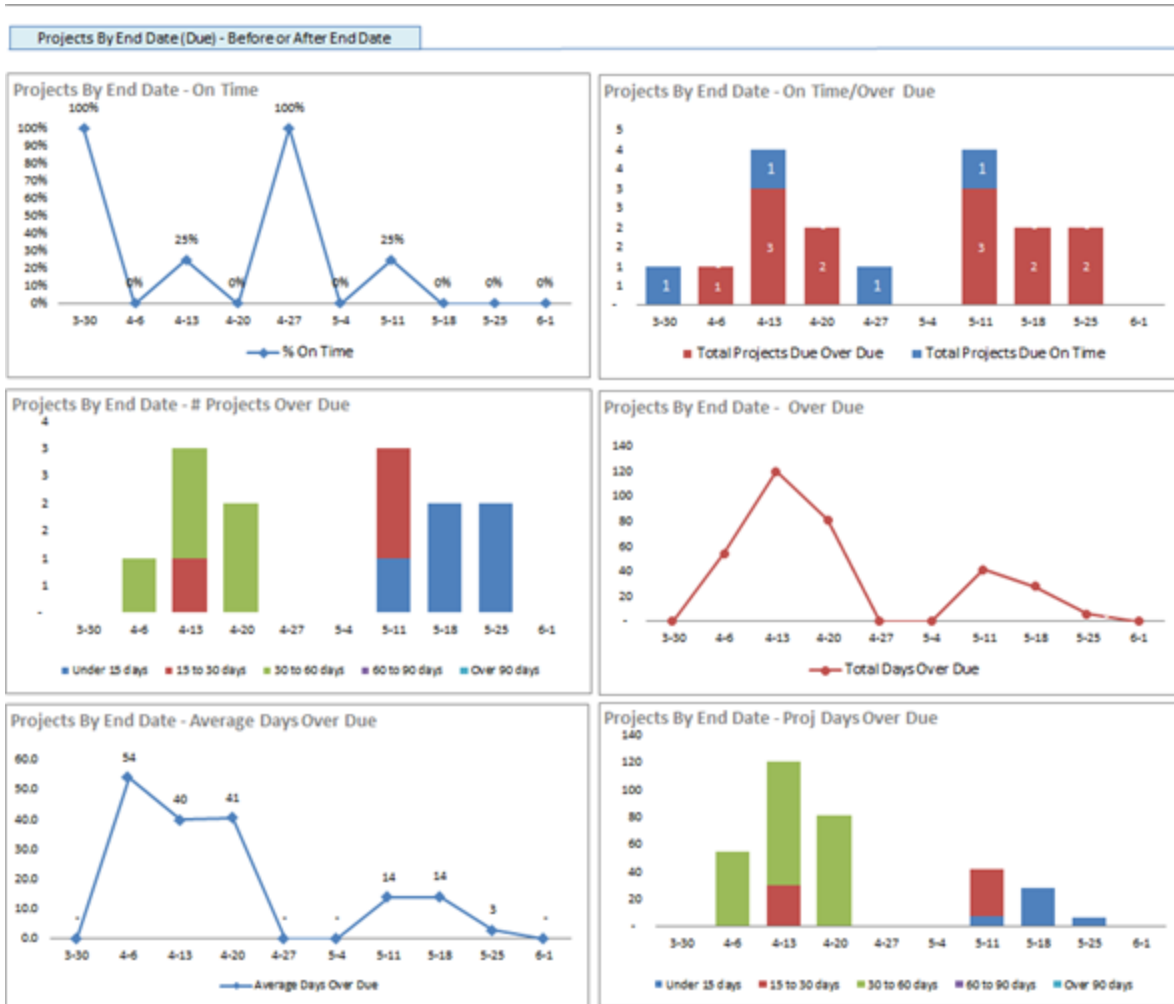
The final six charts on the Project Trends tab look at projects with end dates in the last 10 weeks. First the good news - you can see the percent of projects due each week that were completed on or before due date. You can then see how many projects were completed on time compared to those overdue. 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 overdue 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 overdue for one week, are those hours coming from projects running 30-60 days overdue? Or 60 to 90 days? Or, maybe a number 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.
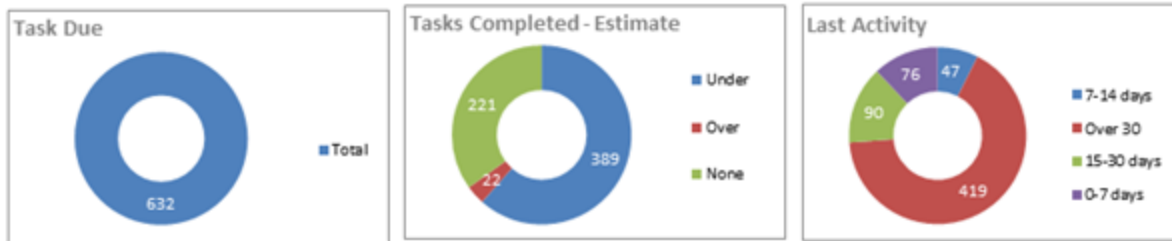
The Slicers

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.
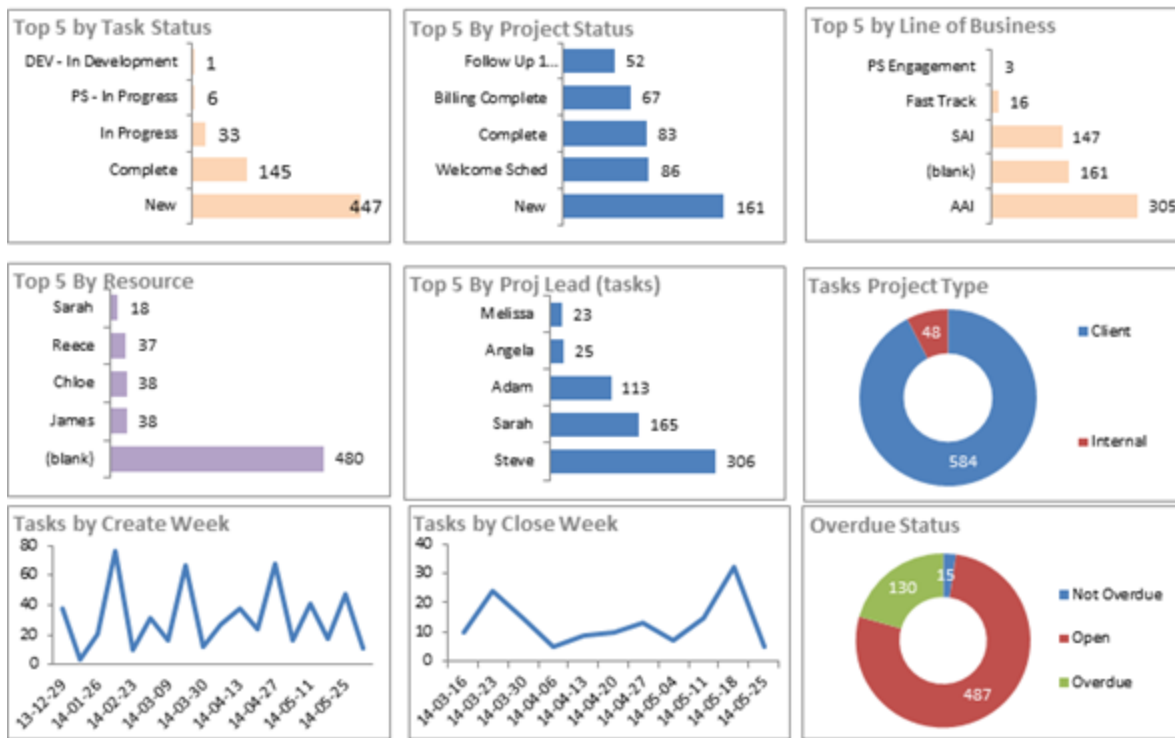
The Charts

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.
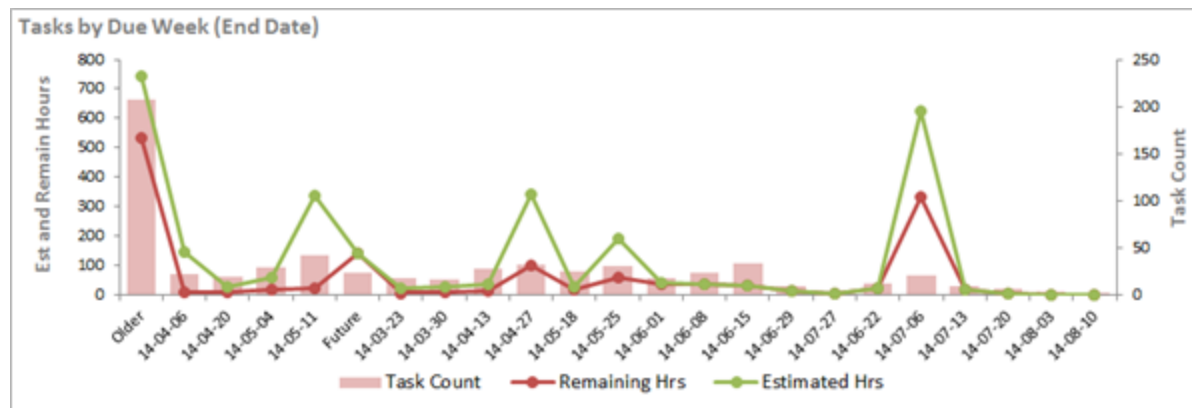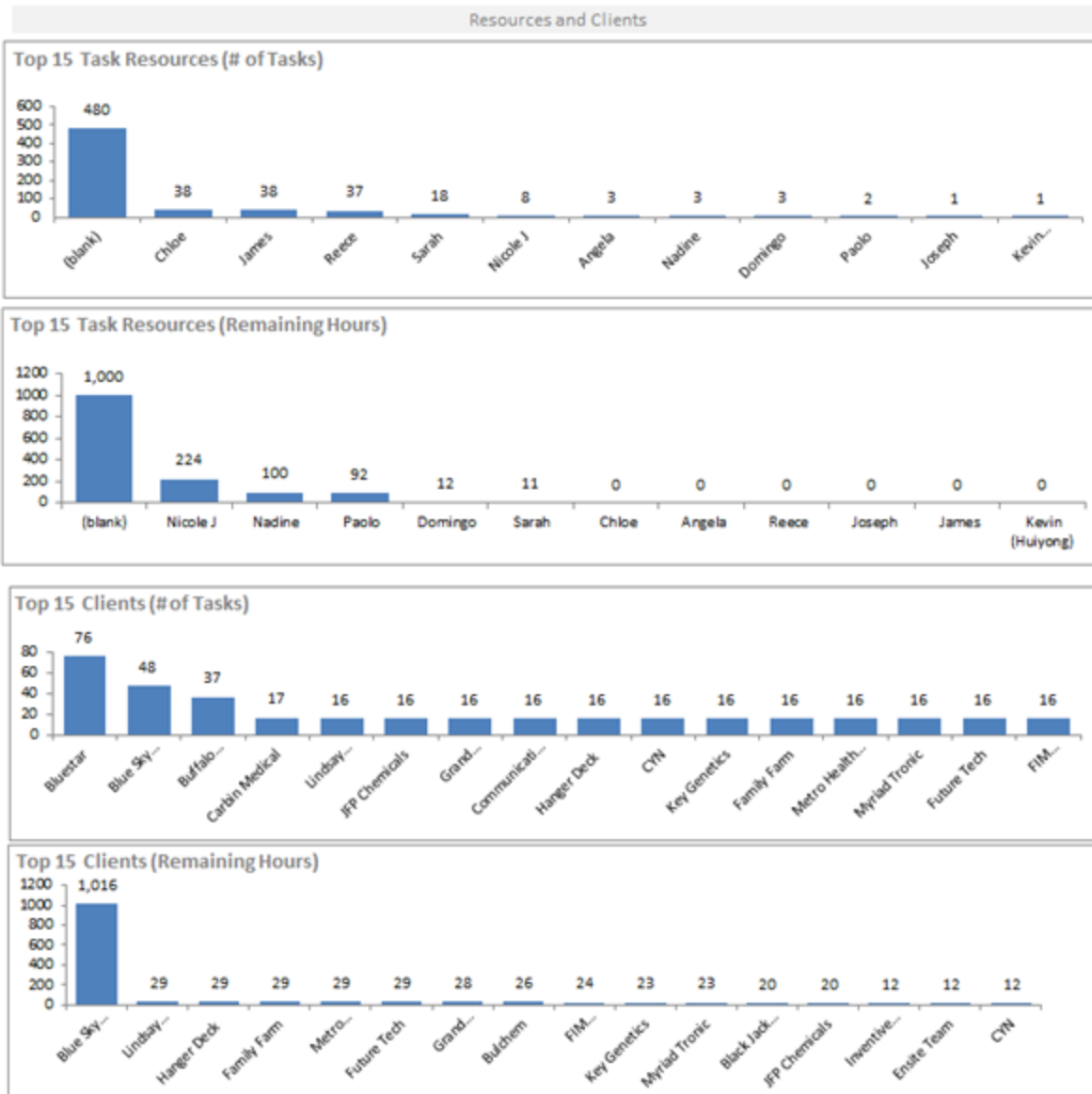

The first of the next three charts simply shows the count of tasks due. The next shows completed tasks, and breaks the data into tasks under or over estimate, or without an estimates. And the third shows where tasks fall in four different date ranges for when the last activity was logged on a task.

Task Due — Total 632

Tasks Completed - Estimate — Under 389, Over 22, None 221

Last Activity — 7-14 days 47, Over 30 419, 15-30 days 90, 0-7 days 76

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.

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Resources and Clients

Top 15 Task Resources (# of Tasks)

Top 15 Task Resources (Remaining Hours)

Top 15 Clients (# of Tasks)

Top 15 Clients (Remaining Hours)

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.
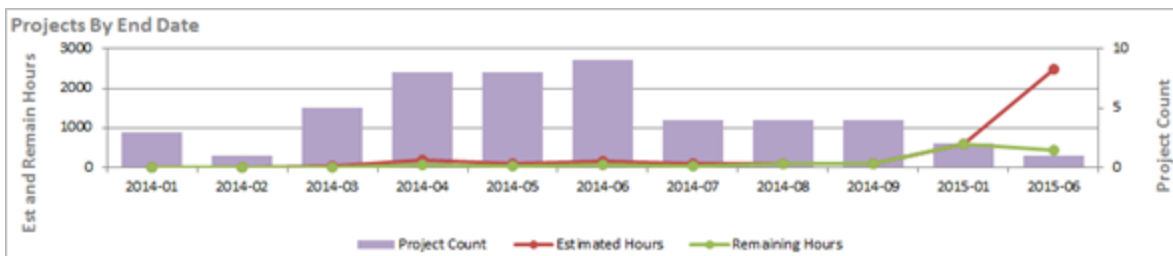
The next fourteen charts let you look at projects by different criteria important to project management.

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You can view project count by Status, project Type, the length of project (Duration), 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).

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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.

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The Account slicer is below the charts

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.
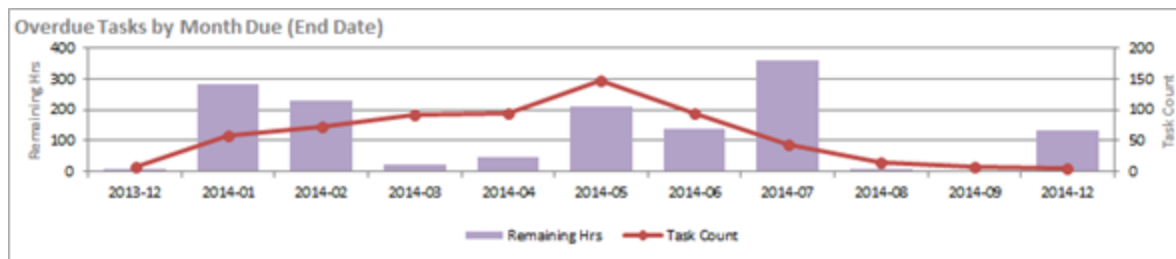
The variety of charts on the Overdue tab is similar to the charts on the Explore Tasks page. You can use them to monitor the number of tasks that were due each week over the previous weeks, or to see which five project leads have the highest number of remaining task hours. You can also view the count 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.
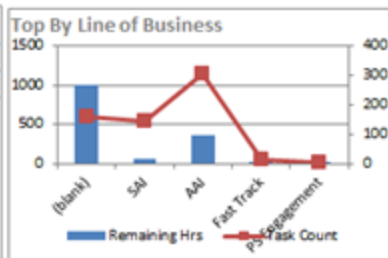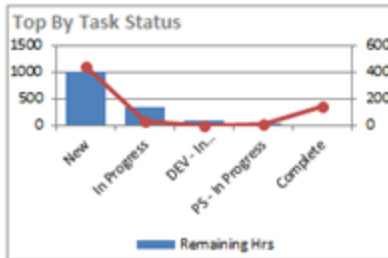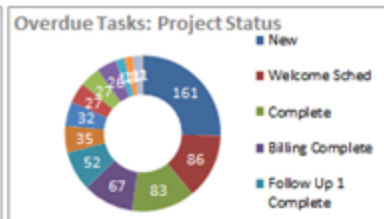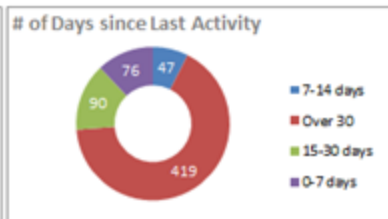
Overdue Tasks By Week Due
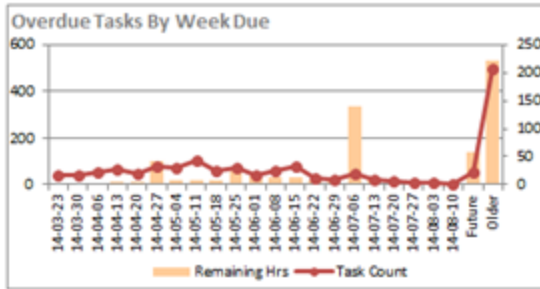
Overdue Tasks By Resource (Top 10 of 12)

Resource Name	Remain H	Task Cou	Avg Days O
(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 - Top Project Leads

Overdue Tasks By Project (Top 10 of 46)

Project / Account	Remain H	Task Cou	Avg Days O
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

of Days Overdue

of Days since Last Activity

Overdue Tasks: Project Status

Top By Task Status

Top By Line of Business

Top By Department
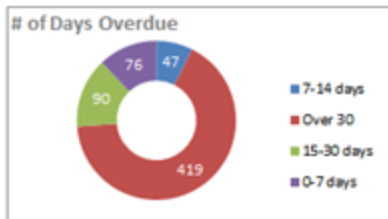
The Tables

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 45.

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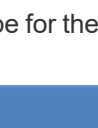
Project Analysis
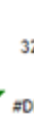
On this worksheet you can view the raw numbers for all the data for all projects in your current data download. Data is presented by Current Week, Last Week, Previous Week, Last 4 Weeks, Previous 4 Weeks (weeks before last 4 weeks) and by week for all 10 weeks included in the data set.

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 45.

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 6.

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

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

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

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

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

Or refer to "Add or Update an Advanced Where Clause" on page 17.

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

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

Yes, you can save multiple versions of your workbook.

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

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

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

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

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

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

Or refer to "Customizing Your Data Display" on page 10.

💡 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 19.

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 10.

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 50.

About the Workbooks Data Cache

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

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

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

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

Data Refresh Times

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

- Between 1 AM and 5 AM EDT

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

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

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

Contacting Customer Support

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

Before contacting support, please review the information in this PDF document, especially "Get Started with Performance Analytics" on page 3, "Frequently Asked Questions - FAQs" on page 47, and "About the Workbooks Data Cache" on page 50.

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