M-THEORY GROUP

Introduction: How to Run Templated Reports

We have created a series of report templates in AutoTask. These report templates can be run quickly to review information relating to the processing of Help Desk tickets.

Running these reports involves downloading two files:

- Excel Template (download from here :)
- Report from AutoTask (Instructions follow)

Both files will need to be stored on your local computer. The final step will be to modify the excel file to see the data file.

Step One: Download the Excel Template and save it to your hard drive.

Step Two: Download the Autotask Report (this will be the data file) and save it to your hard drive.

Step Three: Open the Excel template. In the designated cell, enter the path to the Autotask report.

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Step One: Download the Excel Template and save it to your hard drive.

The Excel template can be found at this link:

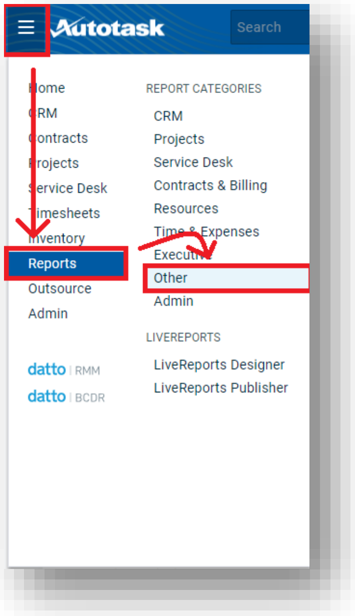
Autotask Reporting Files

DOWNLOAD THIS FILE:

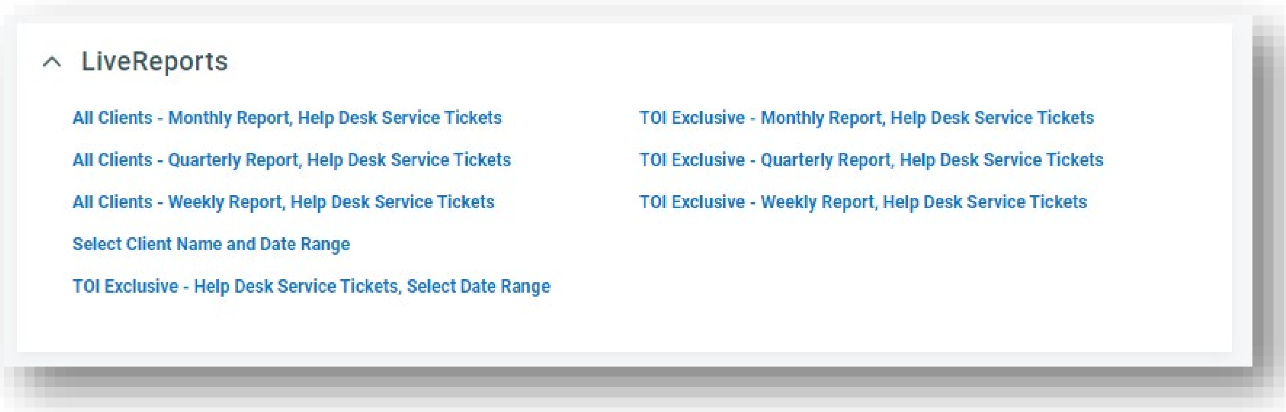
If your report begins with…	Download this matching template:
“TOI Exclusive…”	TOI Autotask Tickets Data Report
“All Clients…”	All Clients Autotask Tickets Data Report
“Select Client Name and Date Range…”	All Clients Autotask Tickets Data Report

Step Two: Download the Autotask Report save it to your hard drive.

1. Hover your mouse cursor over the three lines next to the AutoTask logo. Select "Reports," and then "Other."



2. Click the arrow next to the Live Reports section to view the available reports.

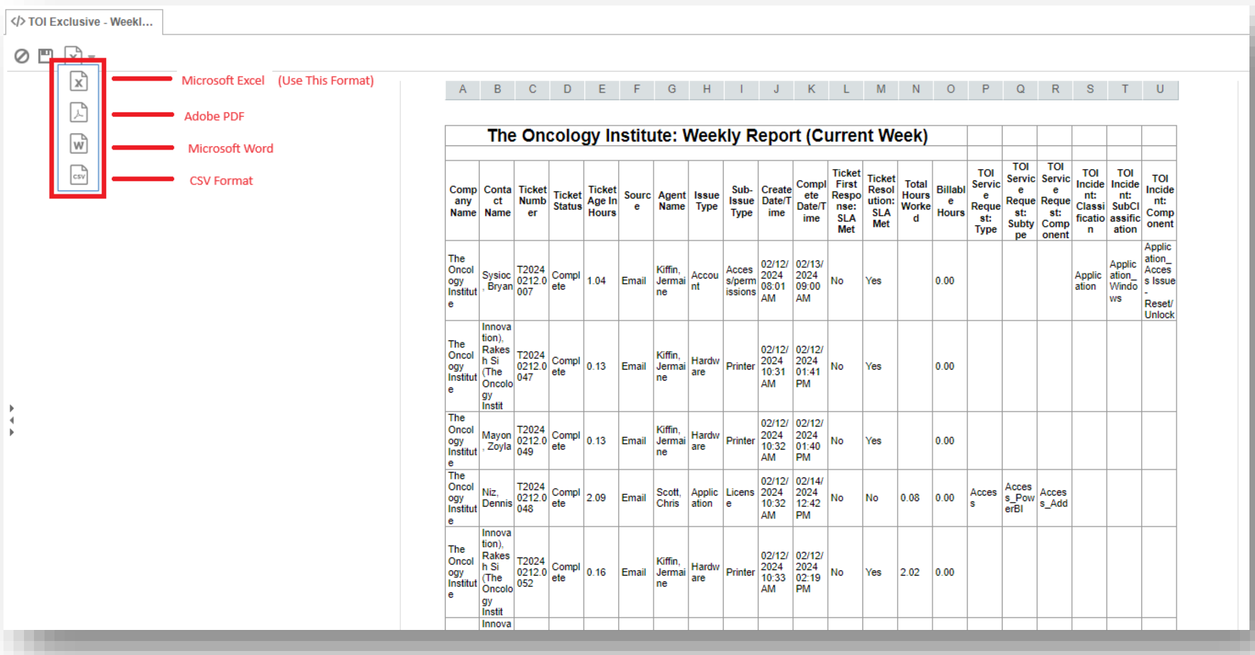


Here are the reports that are available:

Report Parameters		
Report Name	**Client**	**Time Period**
TOI Exclusive - Weekly Report, Help Desk Service Tickets	The Oncology Institute	First day of the Current Week to Last Day of Current Week (week runs Monday-Sunday)
TOI Exclusive – Monthly Report, Help Desk Service Tickets	The Oncology Institute	First day of the Current Month to Last Day of Current Month
TOI Exclusive - Quarterly Report, Help Desk Service Tickets	The Oncology Institute	First day of the Current Quarter to Last Day of Current Quarter
TOI Exclusive - Help Desk Service Tickets, Select Date Range	The Oncology Institute	Select Date Range (see instructions below)
All Clients - Weekly Report, Help Desk Service Tickets	All clients (including the Oncology Institute)	First day of the Current Week to Last Day of Current Week (week runs Monday-Sunday)
All Clients - Monthly Report, Help Desk Service Tickets	All clients (including the Oncology Institute)	First day of the Current Month to Last Day of Current Month
All Clients - Quarterly Report, Help Desk Service Tickets	All clients (including the Oncology Institute)	First day of the Current Quarter to Last Day of Current Quarter
Select Client Name and Date Range	Select Client Name (See instructions below)	Select Date Range (see instructions below)

Running a fully-automated report

An automated report is any of the reports that do not have “Select Client Name” or “Select Date Range” in the title. These reports will run automatically once the link has been clicked.



Once the report has been run, select the excel icon in the upper left hand corner to display a drop-down menu. This is the export menu, and it will allow you to export the report in several formats (Excel, PDF, Word, or .CSV format.) Download the report in Excel format.

Important note: In order for the Excel template to work correctly:

- The file *must* be downloaded in Excel format and
- The files (both the Excel template and the Autotask Report) ***absolutely must be stored on the local hard drive.*** The Excel template will not function if the file is stored in a remote location, such as on a network drive or internet location.

Once you have downloaded your report, make certain you know exactly where it is stored. You will need the file path for the next step.

Running a "Select name or date range" report

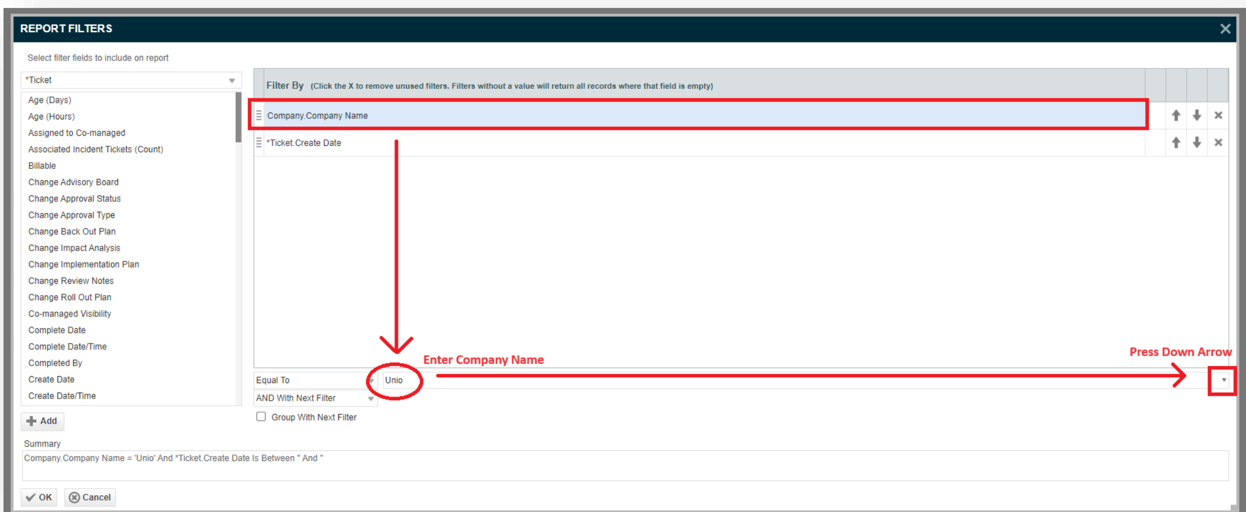
There are two reports which allow for some configuration:

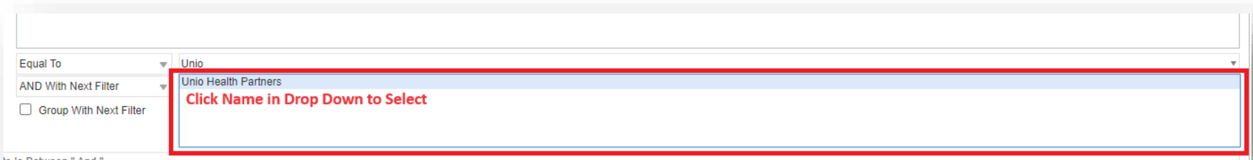
- TOI Exclusive - Help Desk Service Tickets, Select Date Range
- Select Client Name and Date Range

When these links are selected, the report will not run right away. Instead, they will prompt for information.

ENTER THE CLIENT NAME

To select a company name, enter the client name in the blank box next to the "Equal To" modifier, and then click the down arrow at the end of the box. This will cause Autotask to search for that client name.



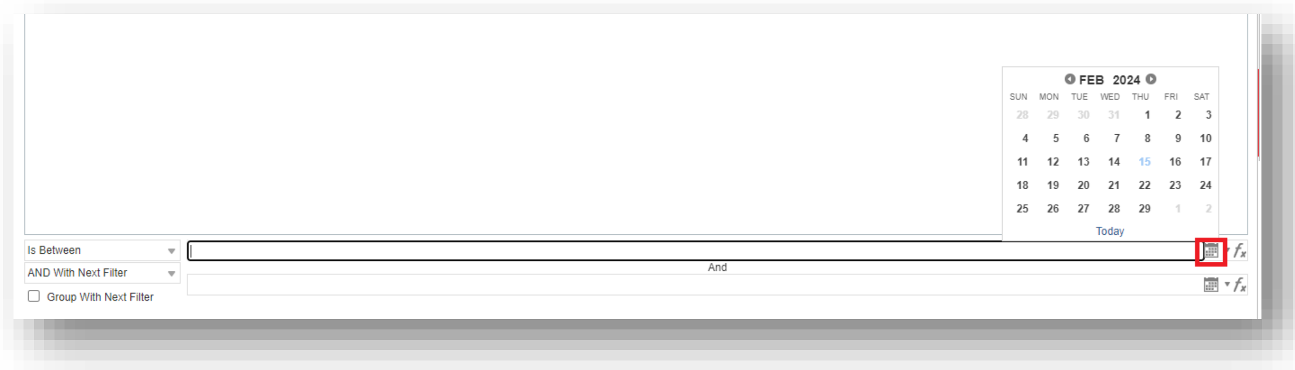


Once the client name appears, click it to put it into the box.

Important note: you ***must*** use the search feature to locate the client name. No data will be displayed in the report unless the client name been located via the search feature.

Select a Date Range

The Date for a report can be selected in one of two ways. There is an icon in the lower right hand corner which will display a calendar, which will allow you to select a specific date.

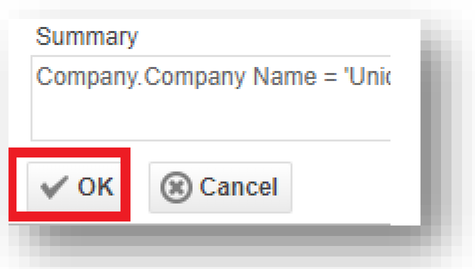


There is also a button marked 

This button will allow you to make a selection on criteria other than the absolute date. Examples of the sorts of selections that can be made include:

- The first day of last quarter
- Today minus 30 days
- Saturday of Last week

Once you have made your selections, press the OK button in the lower left hand corner.



The report will run with the selected criteria. Save the report on your hard drive.

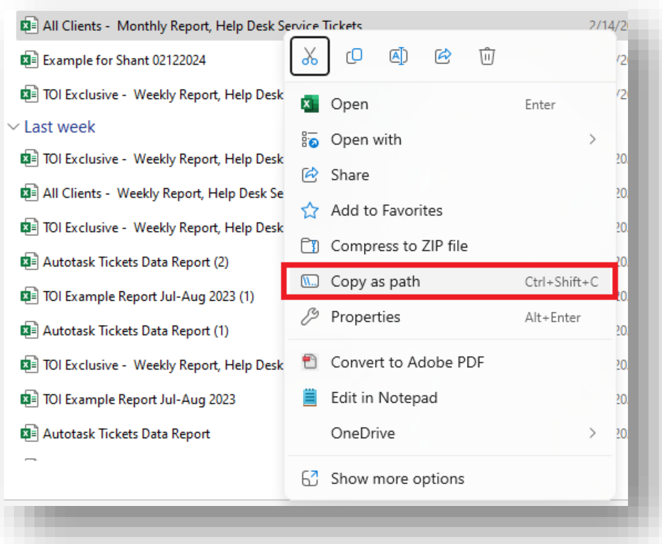
Step Three: Open the Excel template. In the designated cell, enter the path to the Autotask report.

Once you have downloaded both the Excel template and the Autotask report data, open the excel template. The template has three tabs: Data, Charts, and For Client.

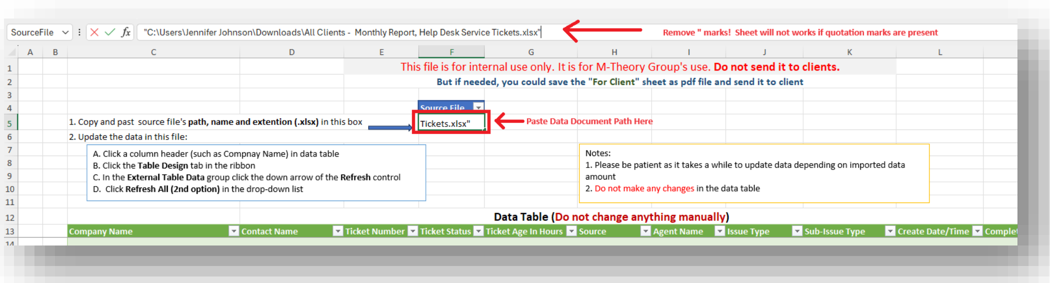
DATA:

You will need to paste the path of the source file (i.e., the Autotask report) into cell F5, labelled "Source File. To do this, follow these steps:

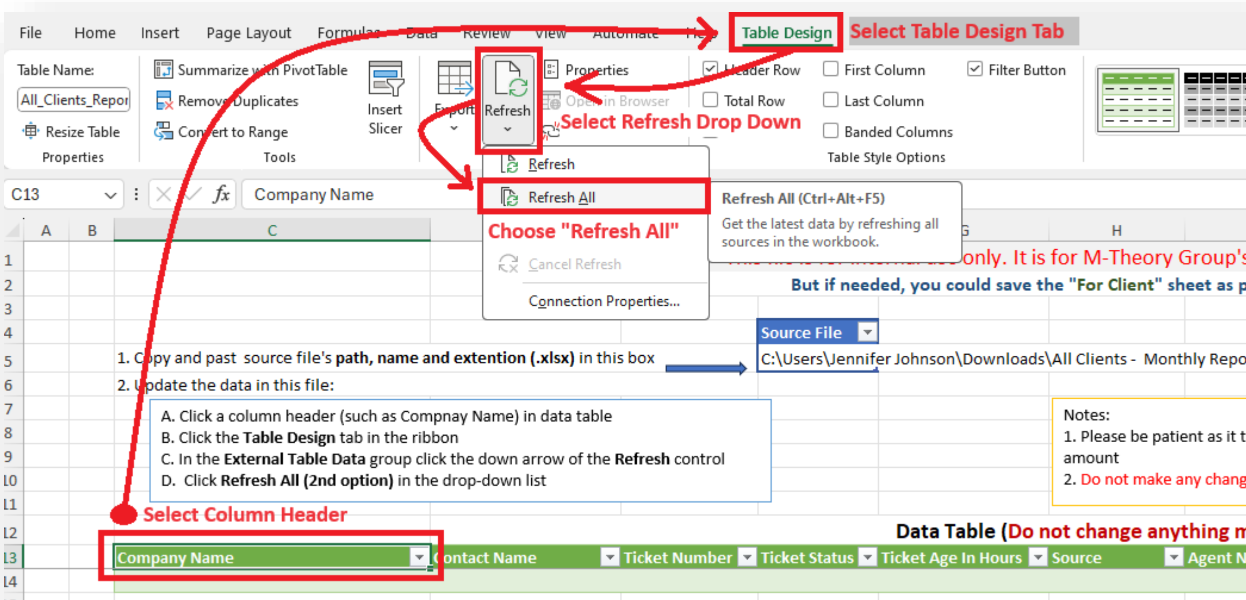
1. Locate the file you wish to use as the data file. Right click it, and choose "copy as path" from the menu which pops up:



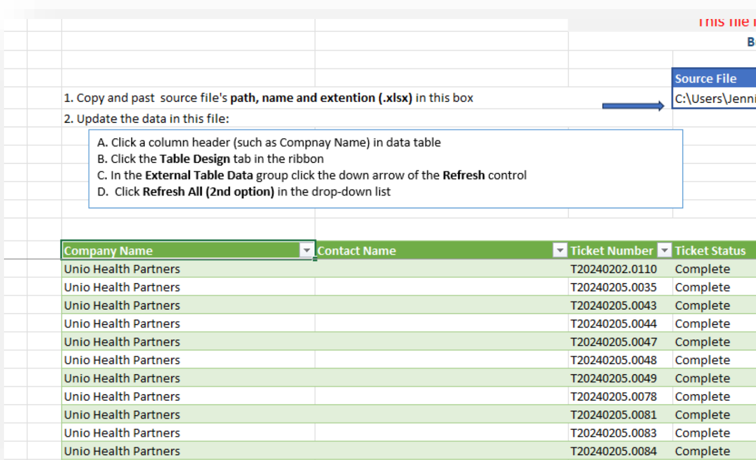
2. In the excel spreadsheet, place your cursor in cell F5 and choose "Paste."
   Important Note: make sure that the path does not contain any quotation marks. The sheet will not run if quotation marks are present. If the path pastes in with quotes, remove the quotes before proceeding. Press enter once the line has been copied.



3. Once the path of the data file has been copied, select any column header. In this example, we have selected cell C13, “Company Name.”
    a. With the cell selected, go to the “Table Design” tab.
    b. Click the “Refresh” drop down menu.
    c. Select “Refresh All” from the drop down menu.
    d. ***Important note:*** depending on the size of the data file, this operation may take several minutes to complete. Please wait until the refresh has finished before proceeding.



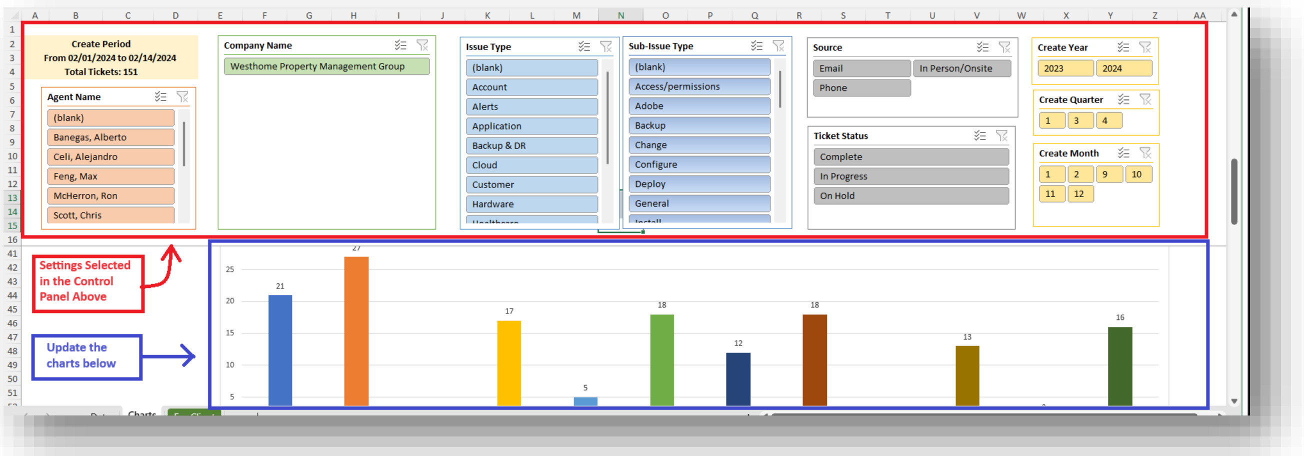
4. Once the “Refresh all” operation finishes, data will populate in the previously-blank file.



5. Once the data has populated, the Process is complete. It will now be possible to interact with the charts that are displayed on the Charts tab.

CHARTS TAB:

1. The charts on the Charts tab will not become active until the Data tab has been updated. Please complete all steps listed on the Data tab before attempting to interact with the charts.
2. The Charts tab is divided into two halves. The upper half of the page displays various topics. Clicking any of these topics will display further information about the selected item. The charts will update depending upon the topics that have been chosen.



FOR CLIENT:

1. While the charts that are displayed on the "charts" tab work well for review, they unfortunately export badly, as it is not possible to minimize the control panel when exporting. The charts have therefore been duplicated on the "For Client" tab. These reports are meant for internal use only, but if it should be necessary to export a particular report (for example, in a PDF file,) the "For Client" tab is set up for this purpose.
   a. When exporting, remember to export the "For Clients" tab only, and not either of the other two tabs.
   b. Because the charts displayed on the "For clients" tab are copies of the charts displayed on the "Charts" tab, both sets of charts will update to display whatever criteria has been selected on the "charts" control panel.[