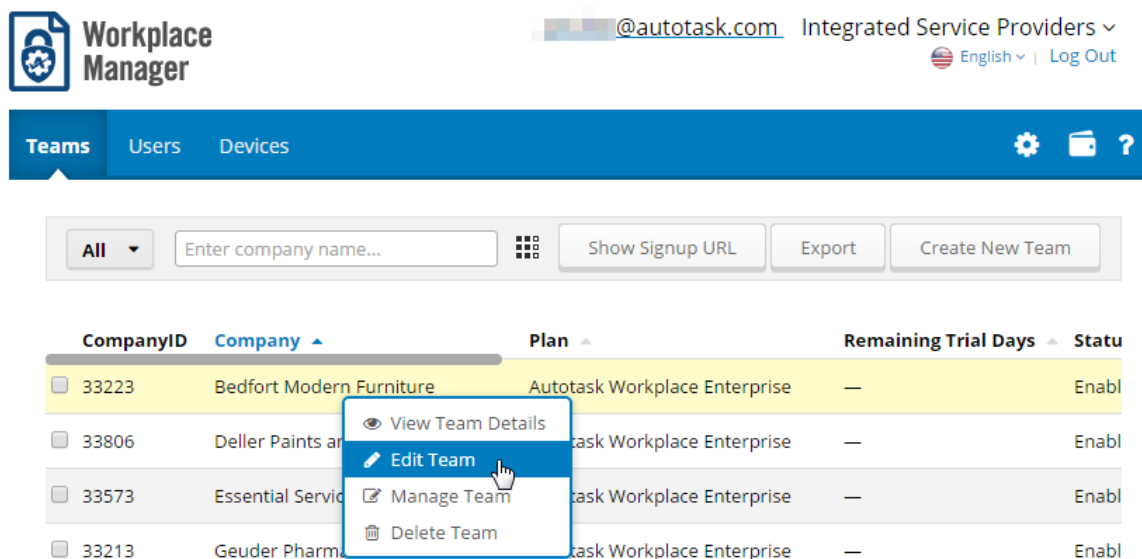


# Workplace Manager Release Notes - Early March 2016 Service Update

The February 2016 Service Update includes the following enhancements for Autotask Workplace Manager:


## Simplified Menu Structure

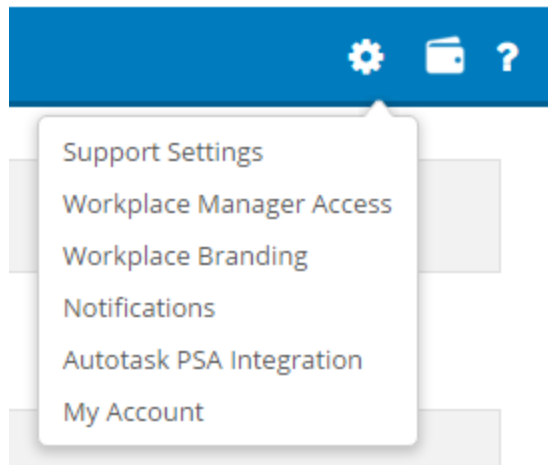
The menu structure of Workplace Manager has been streamlined. The list view for client teams, users and devices can be accessed with one click. All other features are available by clicking or right-clicking on an item in the list, or by clicking on a button.



The screenshot shows the Autotask Workplace Manager interface. At the top left is the logo. The top right shows the user's email address (@autotask.com), language (English), and a Log Out button. Below this is a navigation bar with 'Teams', 'Users', and 'Devices' tabs, along with settings, calendar, and help icons. A search bar and several action buttons (Show Signup URL, Export, Create New Team) are present. The main content area displays a table of client teams. A context menu is open over the second row, showing options: View Team Details, Edit Team, Manage Team, and Delete Team.

CompanyID	Company	Plan	Remaining Trial Days	Statu
33223	Bedfort Modern Furniture	Autotask Workplace Enterprise	—	Enabl
33806	Deller Paints and	Autotask Workplace Enterprise	—	Enabl
33573	Essential Service	Autotask Workplace Enterprise	—	Enabl
33213	Geuder Pharm	Autotask Workplace Enterprise	—	Enabl

The Settings  menu allows you to configure Workplace Manager, including managing your user account, setting up workplace manager access for others in your company, branding your client team sites, determining who receives product notifications when Autotask updates Workplace Manager, and configuring the Autotask PSA Integration.





## Column Chooser

On the Teams, Users and Devices list pages, we've added a column chooser, so you can select which columns you want to see. Use this feature to customize the list views to display exactly the data you want and to make administration easier.

How to use the new column chooser:

1. Log into Workplace Manager.
2. Click on **Teams** or **Users** or **Devices**.

3. Click the  icon on the toolbar of the list. This will open the column chooser:

Show / hide columns	
<input checked="" type="checkbox"/>	Device
<input checked="" type="checkbox"/>	Member
<input checked="" type="checkbox"/>	Agent Version
<input type="checkbox"/>	Update
<input checked="" type="checkbox"/>	Approval Date
<input type="checkbox"/>	Backup Status 
<input type="checkbox"/>	Backup Usage
<input type="checkbox"/>	Sync Status
<input type="checkbox"/>	Sync Usage
<input checked="" type="checkbox"/>	Last Connected
<input type="checkbox"/>	Online/day
<input type="checkbox"/>	Online/week
<input type="checkbox"/>	Reconnects/day
<input type="checkbox"/>	Reconnects/week
<input type="checkbox"/>	Agent Upload
<input type="checkbox"/>	Agent Download

4. Select the check boxes corresponding to the columns you want to display. The list will update automatically.



Workplace will remember the selections you've made, but you can change the configuration of the page any time you want. This provides you with a powerful administration tool that allows you to track the precise status of all your team's devices.

## Exposed Company, User and Device (Agent) IDs

On the Teams, Users and Devices list pages, we've added a column that displays the CompanyID, UserID and DeviceID, respectively. These are the IDs that you need to provide when you submit a ticket to Autotask Support.

## Provisioning a Team from a PSA Ticket

Users who have the Autotask PSA integration enabled and who are provisioning a team from a PSA ticket will now see the ticket number, ticket title and ticket description displayed on the Create New Team or Edit Team page.

Teams Users Devices ⚙️ 📁 ?

**Autotask PSA Ticket**

**Ticket Number**  
T20160222.0003

**Ticket Title**  
Opportunity Closed:[Additional Workplace seats]

**Ticket Description**  
please provision

**Seats** +10

[Apply Changes](#)

Ticket content is not yet applied.

**Edit Team**

Team Name:

Team Plan: Autotask Workplace Enterprise

Seats:

Each Member Seat will include 50 GB available for the Team

Included Storage: 400 GB

Additional Storage:  GB  
Enter additional storage in 100 GB increments

Invoice Frequency:

Internal Use License (IUL)  [What is IUL?](#)

Trial:

Team Enabled:

Create Administrator:

---

**Autotask Integration**

PSA company name	Phone	Address
Integrated On-Call Physicians	5187203500	7500 Eastern Blvd <a href="#">✎</a>

If there is no closed opportunity tied to the ticket that determines the number of seats or the amount of storage, the ticket box will indicate that these items will need to be added manually. In either case, seats and storage can be manually adjusted, and the contract in Autotask will not be created or updated until the Create New Team page is created or the Edit team page is saved.

## Export to Excel

In addition to the *semicolon*-delimited export to .CSV, the Teams and Users list pages now feature an Export to XLSX option. This will allow users whose default delimiter for numbers is a comma to export the list, without having to convert it to a comma-delimited file after the export.

1. On the Teams or Users list, click **Export**.
2. Select **XLSX**. The Excel file will open.