Microsoft Partner Network

My Insights User Guide

Updated: February 21, 2019
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1 Executive Summary

The My Insights dashboard is designed to provide you with a 360-degree view of your membership and cloud activities transacted with Microsoft. The new My Insights dashboard leverages Microsoft Power BI technology and combines the previous two reports, Partner Summary Report and Cloud Services Dashboard, and consolidates all the data into a single report. You will be able to track your competency progress, review your benefit consumption, and monitor your cloud subscriptions and consumption within this dashboard.

The dashboard contains five primary tabs which provide optics into the status and health of your membership and cloud services business. If you are a distributor, you will also see a sixth tab which contains the list of resellers who are working closely with you. With the latest release, you will be able to view the data at both an MPN location level and MPN global level.

1.1 Target audience

The target audience for the My Insights dashboard includes all partners within the Microsoft Partner Network and who already sell, customize and deploy a Microsoft online service, as well as partners considering doing so. This includes both direct-selling partners as well as partners selling through a channel of resellers. This document is also relevant to companies that advise their customers as to what cloud services to consider and purchase.

1.2 Navigation

You can access the My Insights dashboard by logging in with your credentials at MPN Partner Portal located at https://partner.microsoft.com/. Navigate to the ‘Membership’ menu and select “Your accounts and Reports”, select “My Insights” for the primary Dashboard menu and “Dashboard Training Library” for training artifacts.
To navigate to a specific Location account within your organization, click on “MPN Org Hierarchy”, then click on the + sign next to the Partner ID to reveal all associated Locations. You may then select from any of the locations listed:

1.3 Features

1.3.1 Power BI Built-in functionality

Power BI has provided many built-in functionalities that enable you to view data.

1.3.1.1 Focus mode

Each section/chart has a Focus mode icon which allows you to focus data on a selected panel. Clicking on the “Focus mode”, you will be taken to a new window with only data from that panel; you can click on “Back to report” and return to previous window.

1.3.1.2 Spotlight

Each section/chart has a Spotlight icon which will grey out all other data on the report and shows only the selected panel. Clicking on Spotlight again to return to normal viewing mode.

1.3.1.3 Sorting

Power BI has provided built-in function which allows you to sort data on the selected panel.
1.3.1.4 Export Data
The default Power BI’s export functionality allows you to export summarized data only. To see the detailed data, you will need to use the custom Export to Excel function at the top or bottom of the page.

1.3.1.5 Drill up/Drill down
The drill up/dill down feature allows you to see different levels of aggregation. You can click on “Drill up” to see the overall aggregation data or click on “Go to the next level in the hierarchy” to go to the sub workload level data.
1.3.2 Export to excel

The dashboard makes use of standard embedded Power BI features. In all cases, it is possible to download the data associated with any reporting tile. Select the ellipses symbol (...) to display the Power BI menu, and select “Export data”.

Data is also available to be downloaded to Excel wherever you see the Export to Excel icon.

2 Profile Membership & Training

2.1 Profile

When you first land on the dashboard, by default you will see the Profile Membership & Training page. There are three sections within this page: Profile, Membership, and Training. The profile page provides all the information you provided when you enrolled in the Microsoft Partner Network, including your address, and contact information. It also includes your current membership status and anniversary date. You will be able to see the headquarters and various locations you have designated as part of your organizational hierarchy. If your organization is managed by an account manager, you will be able to see the person who is managing your account.
**Partner by Geography**: At the bottom of the Profile page, you will see the Partner by Geography chart. It is possible to drill-down from geographic area to view all subsidiaries in which the Partner has a location, by double-clicking on the Area bar (this is a standard Power BI feature).

2.2 **Membership**

The membership page will provide you with the list of competencies you have either earned or are working on. It includes current competency status, including active competency, at risk or non-compliant competency, and in-progress competency. You will be able to dive in to the details on competency requirements and understand the gaps in competency attainment.

2.2.1 **Key measures:**

- **At Risk**: The count of competencies that are at risk of being lost due to expiring or non-compliant competency requirements.
• **Hot Leads**: The count of competencies that are missing only 1 requirement to achieve an earned status. The missing requirement may be in either “In Progress” or “Requirement Not Met” state. Selecting the Hot Leads filter icon will provide a listing of all Competencies that are missing only 1 requirement within a Competency (gold or silver). Then select the competency from the Competency Summary table to view the list of requirements for that specific competency.

• **Qualified**: All requirements for the Competency have been met; the Competency status is pending a change to Earned status.

• **Not Compliant**: The count of competencies with a previous status of Earned where one or more of the competency requirements has expired and requires attention.

• **In Progress**: The count of competencies where you are showing partial completion on one or more of the competency requirements.

2.2.2 Competency Summary report:
To view competency in various status, you can use the filters provided at top of the page (Not Compliant, At Risk, Hot Leads, Competency Type, Cloud Competency, Status, or Requirement Type) to limit the list of Competencies shown.

To view the requirements specific to a single competency, select the competency name in the Competency Summary table as shown below:

2.2.3 Action Pack Subscription Summary:
Shown for Action Pack partners at a headquarters level.
2.2.4  Program Enrollment Summary:
The Program Enrollment Summary view provides information on all programs in which you are enrolled. Name, Status, Attainment date as well as Start and End Dates are included within this perspective.

2.3  Training
The Training page will provide you information on individuals from your organization who have taken exams, or passed MCPs, as well as the detailed exam information. If you have the administrator privilege for your company, you will be able to see the individual's name and email information.
2.3.1 Features

- **Sort:** Click on any report column header to sort the data using specific column data.
- **Export to Excel:** Download the report data to Excel, by clicking on ... on top right of report, and selecting “Export data” option (Note that there is also an Export to Excel feature on the top right of this page.)
- **Exam details:** Click on Individual ID and/or Name to view all Activities associated with that individual (as shown):

![Report Table]

2.3.2 Filters
Use filters to select a subset of associated individuals:

![Filter Table]

- **Is MCP:** if the individual is MCP
- **Is Associated MPN:** if the individual is associated with a competency
3 Cloud Product Performance

The Cloud Product Performance tab replaced the previous Cloud Services Dashboard. It allows you to track the status of your customers’ subscriptions and consumption for Microsoft Office 365, Microsoft Azure, Microsoft Enterprise Mobility, Microsoft Dynamics 365, and Microsoft Power BI. When you land on the dashboard, the default view will be the summary view page.

The product tabs will display partner critical business insights such as consumption and usage with seats and workload details, and Azure consumed revenue by billing cycle, customer-level information, and partner of record history, as well as active usage for Cloud services including Office 365, Azure, EMS, Power BI, and Dynamics 365.

3.1 Summary

The Summary views provide you with an overview of Subscriptions by their status, and Partner Association Type, as well as helping you identify subscriptions coming up for renewal (use the ‘Subscription Renewal Due In’ filter).

Scrolling down to the bottom of the Summary view, you will see the Subscription and Customer details for either Azure Consumption or Seat based products (using the drop-down menu).
3.1.1 Key Measures

- **Subscription Count**: count of subscriptions in TTM (Trailing Twelve Months) with Active and In-Grace period status.
- **# of Customers**: count of TPIDs for those subscriptions.
- **New in Last Month**: number of new subscriptions added in the last month
- **Lost in Last Month**: number of subscriptions that you have lost as DPOR
- **# of subscriptions by Partner Associations**: count of subscriptions based on your roles, including POR (Digital Partner of Record), TPOR (Transacting Partner of Record), DAP (Delegated Admin Privilege), and FT (FastTrack).
- **# of Subscriptions by Customer Geography**: heatmap view based on the customer geography.
3.1.2 Filters

- **Filter**: Use filters at top of report to focus on specific subscription characteristics:
  - **Country Filter**: Select specific country (for global partners)
  - **Time Period**: Lifetime, QTD: Current Fiscal Quarter, YTD: Current Fiscal Year, or TTM: trailing twelve months.
  - **Subscription Status**: Active, In Grace period, plus others
  - **Subscription Renewal Due In**: 30, 60, or 90 days
  - **Is Auto Renew**: Yes/No
  - **Partner Association Type**: Partner of Record (POR), Transacting Partner of Record (TPOR), Delegated Admin Privilege (DAP), CSP Tier 1, CSP Tier 2 or FastTrack
  - **Product**: Select specific product

- **Export to Excel**: All data shown on the report is also available in the Export to Excel download

- For Subscription list, display either Azure or Seat-based subscriptions, and export list to Excel if desired. Metrics are available by either subscription identifier or by distinct customer.
3.2 Office 365

In the O365 active use area, you can see qualified and active entitlements by workload, including ProPlus, broken down by Partner Association type, and customer geography and segment.

O365 Active Usage Details are available on a Customer Tenant or Customer ID level of detail. Additional details are available in the Excel Export, including the Workload classification, SKU ID and Type, and Partner Association Type.

3.2.1 Key definitions

<table>
<thead>
<tr>
<th>Measurement</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Entitlements</td>
<td>The unique count of users, by workload, that have taken an intentional action with that workload in the past 28 days. Examples of intentional actions include sending, forwarding, or replying to emails via Exchange Online; uploading or downloading a file; creating or editing a site via SharePoint Online; participating in an IM or Skype call via Skype for Business; or posting or replying to a post via Yammer.</td>
</tr>
<tr>
<td>Qualified Entitlements</td>
<td>The count of entitlements meeting the Qualified SKU filtering criteria for inclusion.</td>
</tr>
</tbody>
</table>
Active Use Percentage

| Active Entitlements (Unique Active Users) divided by Qualified Entitlements. |

3.2.2 Filters

- **Partner Association Type**: Digital Partner of Record (POR), Transacting Partner of Record (TPOR), Delegated Admin Privilege (DAP), CSP Tier 1, CSP Tier 2, Syndication, FastTrack or FastTrack Ready
- **SKU Type**: View usage by Commercial or Educational SKUs

3.2.3 Adoption Stage

Scrolling down to the bottom of the O365 report page - the adoption stages report provides customers’ current O365 consumption status, helping you identify gaps in usage, dormant subscriptions at risk of not renewing, and growth or sales opportunities with Optimized customer subscriptions who may be consuming their last available seats or subscription capacity.
The O365 adoption stages chart will always show data for the past twelve months. Customer adoption stages are defined as:

- **Optimized**: 40% or higher usage on 3 or more workloads
- **Diversified**: 20% or higher usage on multiple workloads
- **Core**: 20% or higher usage on a single workload
- **Initialized**: Less than 20% usage on all workloads
- **Dormant**: 0 - 1% active usage across all workloads

3.2.4 SFB to Teams Migration

To support partners with the transition from Skype for Business Online to Microsoft Teams, check out a new training video explaining how to access and utilize the Automated Upgrade Dashboard in My Insights. With this dashboard, Microsoft partners can view associated tenant upgrade status including eligibility and scheduling, to support their customer’s migration from Skype for Business to Teams. View this short video and presentation to get the most from the Automated Upgrade Dashboard in My Insights. Check out additional Skype for Business to Microsoft Teams upgrade resources for partner at http://aka.ms/icpartners.

![Table showing tenant status]

Tenant Status represents migration status of Tenant from SFB to Teams. To get additional information on this, check Upgrade Eligible, Scheduled Migration Date, Actual Date Migrated columns in the grid.

- **Deferred**: Customer has deferred their upgrade by 30 days
- **Upgraded**: Upgrade to Teams is completed
- **Scheduled for Upgrade**: Upgrade date has been established
- **Eligible for Scheduling**: Tenant is eligible to be upgraded
• **Whitelisted**: MSFT has placed a temporary block on this tenant

### 3.2.5 Export to Excel

There are several options which allow you to export data to Excel based on how you want to see the data. You can export the data for Active Usage or by Adoption stages. You can also choose the fiscal month for the data.
### 3.3 Microsoft Azure

Click on the Microsoft Azure tab to view Azure Consumption data. Consumption can be categorized by Partner Association Type, Customer Geography, Customer Segment, and by Service Levels. Make use of filters to modify the Time Period for the report or filter all consumption data by Offer or Partner Association Type.

Please note that Azure subscription details are reflected within 5 to 7 business days from the Digital Partner of Record assignment date for subscriptions that have completed one or more billing cycles. For net new subscriptions, DPOR will update upon completion of their first billing cycle. After billing cycle completion, net new subscriptions will reflect within associated reports.

#### 3.3.1 Key definitions

<table>
<thead>
<tr>
<th>Measurement</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billed Consumption</td>
<td>This is calculated usage revenue for a given billing period. It is calculated on distributing Azure Usage from an Enrollment to all TPIDs that have End Customer Billed Revenue and are also attached to that Enrollment. The Azure Usage is distributed proportionately based on these Billed Revenue amounts.</td>
</tr>
<tr>
<td>TTM</td>
<td>Trailing twelve months for billed consumption.</td>
</tr>
</tbody>
</table>
3.3.2 Filters

- **Time Period:** Lifetime, QTD: Current Fiscal Quarter, YTD: Current Fiscal Year, or TTM: trailing twelve months.
- **Offer:** marketing programs that the Azure subscriptions are sold under.
- **Offer Type:** programs that the Azure subscriptions are associated with.
- **Billed System:** which billing systems the usage was captured, global vs China.
- **Partner Association Type:** Partner of Record (POR), CSP Tier 1, CSP Tier 2 or Transacting Partner of Record (TPOR)

3.3.3 Adoption Stage

The Azure adoption stages report defines the customer’s current consumption status to identify gaps and/or growth opportunities.

- **Optimized:** $10,000 + consumption with 5+ services
- **Diversified:** $5,000 + consumption with 3+ services
- **Core:** $1,000 + consumption with 1+ services
- **Initialized:** $100 + consumption across all services
- **Dormant:** less than $100 consumption across all services
3.3.4 Unbilled subscription details

Unbilled subscriptions are the ones that are not yet billed. These unbilled subscriptions will appear under this grid if a Partner is assigned as DPOR on them.

<table>
<thead>
<tr>
<th>Subscription GUID</th>
<th>Subscription Status</th>
<th>Partner ID</th>
<th>Partner Name</th>
<th>POR Attach Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001669-4086-11FE-B26F-000000000000</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2017-12-11</td>
</tr>
<tr>
<td>019BT412-1C3E-465F-0C66-000000000000</td>
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<td>1121000X</td>
<td>XXX XXX</td>
<td>2017-03-31</td>
</tr>
<tr>
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<td>1121000X</td>
<td>XXX XXX</td>
<td>2017-12-13</td>
</tr>
<tr>
<td>0236664-49F2-4967-0068-000000000000</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2016-06-01</td>
</tr>
<tr>
<td>04768507-1018-4C76-8A08-000000000000</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2017-04-06</td>
</tr>
<tr>
<td>0570472D-9E02-41E3-9F02-9C7959C389</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2017-03-31</td>
</tr>
<tr>
<td>036A4082-9D02-49F2-97B1-000000000000</td>
<td>Open</td>
<td>112100X</td>
<td>XXX XXX</td>
<td>2017-09-08</td>
</tr>
<tr>
<td>05256917-7D1E-4B5F-9EC-000000000000</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2016-07-18</td>
</tr>
<tr>
<td>1184703D-6E02-404D-B012-000000000000</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2016-09-12</td>
</tr>
<tr>
<td>1254561F-3E26-440D-9B6B-000000000000</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2017-08-31</td>
</tr>
<tr>
<td>15503015-72CF-4005-8318-000000000000</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2017-01-04</td>
</tr>
<tr>
<td>155C54BC-5E02-4C4E-9C4E-000000000000</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2015-09-11</td>
</tr>
<tr>
<td>15A220D-94A6-4733-AF02-000000000000</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2018-01-08</td>
</tr>
<tr>
<td>15B1A150-31E8-4186-BDEB-000000000000</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2015-06-27</td>
</tr>
<tr>
<td>15C965EE-2857-4A02-972A-000000000000</td>
<td>Open</td>
<td>1121000X</td>
<td>XXX XXX</td>
<td>2018-01-17</td>
</tr>
</tbody>
</table>

3.4 Enterprise Mobility

Enterprise Mobility Active Use enables end users to access applications, data and resources from anywhere, on any device with mobile device management and secure identity & access management. The Enterprise Mobility Suite includes Windows Intune, Microsoft Azure Active Directory Premium (AADP) and Microsoft Azure IP (AzIP).

You can view your customers’ subscriptions and active usage by Partner Association type, customer geography, customer segments, and product.
### 3.4.1 Key definitions

<table>
<thead>
<tr>
<th>Workload</th>
<th>Calculation</th>
<th>Definition</th>
</tr>
</thead>
</table>
| **Intune**             | Unique users who have at least 1 of the following:                          | • Users with 1 or more devices enrolled in the last 28 days  
                          | • Devices with no users associated enrolled in the last 28 days  
                          | • Users with MAM policy configured                                                                                 |
| **Azure Active Directory Premium (AADP)** | Unique users in trailing 28 days in tenant which have enabled at least 3 of the following features: | • Self-Service Password Reset (SSPR): Users protected by SSPR  
                          | • Multi-factor Authentication (MFA): Users protected by Azure Cloud MFA via user-level MFA configuration  
                          | • 3rd Party Apps: Users successfully authenticated via Azure SSO to a non-Microsoft application  
                          | • 1st Party Apps: Users successfully authenticated to a Microsoft application. This number is capped to the tenant’s usage of paid AAD features  
                          | • Conditional Access: Users protected by a Conditional Access policy  
                          | • Identity Protection: Users protected by an Identity Protection policy  
                          | • Privileged Identity Management (PIM): Users assigned to a privileged role via PIM  
                          | • App Proxy: Users who authenticated to at least one application through the App Proxy service |
| Azure Information Protection (AzIP) | Unique users who have done at least 1 of the following: | • Users configured (can apply RMS templates or have AIP client installed)  
• Licensed users who classify (label or protection) content or consume classified content in the last 28 days |

### 3.4.2 Filters
There are multiple filters provided in the report that allow you to view different level of data:

**Page Level**: when page level filters are used, the data in the entire report will be reflected based on this filter selection.

- **Partner Association Type**: Digital Partner of Record (POR), Transacting Partner of Record (TPOR), Delegated Admin Privilege (DAP), or FastTrack

**Chart level** filters will allow you to choose a sub workload for each of the EMS products.

### 3.4.3 Sub workload usage
In the sub workload, you will be able to see the active usage for each EMS product. The default view is to show all sub workload usage. You can use the chart level filter to select the view product.
Please note: usage is collected at tenant and workload level. Allocation logic is applied so usage can be shown at subscription level. In addition, a user could be included at workload level, but also included in sub workload usage, therefore, the total usage at workload level may not equal to the sum of the sub workloads.
3.4.4 Subscription details

Subscription details are available by Subscription ID, Customer Tenant, or Customer ID. Full details can be downloaded via Excel.

![Active Usage by Product](image)

### Enterprise Mobility Subscription Details

<table>
<thead>
<tr>
<th>Subscription GUID</th>
<th>Subscription Status</th>
<th>Sales Model</th>
<th>Detail Sales Model</th>
<th>Partner ID</th>
<th>Partner Name</th>
<th>Partner Hierarchy Level</th>
<th>Pag</th>
</tr>
</thead>
<tbody>
<tr>
<td>0037C0B3-0000-45F3-9A7B-XXXX00000000XX</td>
<td>Active</td>
<td>EA</td>
<td>VL - Advisor Ltd</td>
<td>35B3535</td>
<td>Microsoft: All Gold Virtual Organization</td>
<td>Pa</td>
<td></td>
</tr>
<tr>
<td>001F28-0000-4F71-1CCD-XXXX00000000XX</td>
<td>Active</td>
<td>EA</td>
<td>VL - Advisor Ltd</td>
<td>35B3535</td>
<td>Microsoft: All Gold Virtual Organization</td>
<td>Pa</td>
<td></td>
</tr>
<tr>
<td>0035C186-0000-4D1A-B86E-XXXX00000000XX</td>
<td>Active</td>
<td>Direct</td>
<td>VL - Direct</td>
<td>35B3535</td>
<td>Microsoft: All Gold Virtual Organization</td>
<td>T1</td>
<td></td>
</tr>
<tr>
<td>002A5450-0000-428C-A560-XXXX00000000XX</td>
<td>Active</td>
<td>Direct</td>
<td>VL - Direct</td>
<td>35B3535</td>
<td>Microsoft: All Gold Virtual Organization</td>
<td>T1</td>
<td></td>
</tr>
</tbody>
</table>

3.5 Dynamics 365

The Dynamics 365 reports display your customers’ seat-based usage associated with Dynamics 365 subscriptions for which you have an association. The data in this report is intended to help you identify your organization’s progress and potential customer opportunities.

Active usage for Dynamics 365 is measured by active seats. Currently active usage data covers only Dynamics 365 Workload. It does not include Dynamics Marketing, Social Listening, or Parature. Users need to take intentional action, including create, update, delete, assign, read, or query on any record of any entity to qualify as active use. Example of intentional use include creating or updating an account, converting a lead to opportunity, assigning a case to a customer representative, and log-in to check on approvals or pipeline.
Please Note: For Dynamics 365, the following partner channels are included: Advisor and Open reseller (CSP is in progress) and all licensing programs (Open, Enterprise Agreement, MPSA, Web Direct and CSP) are shown. When two or more partners of record are attached to the same customer (tenant) of Dynamics 365, a rule is applied to allocate a percentage of active seats to each partner based on available seats.
3.5.1 Key definitions

<table>
<thead>
<tr>
<th>Measurement</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualified Available Seats</td>
<td>Number of seats that are ‘service’ ready within the product and hence available for a customer to assign. Includes both paid and unpaid seats</td>
</tr>
<tr>
<td>Qualified Assigned Seats</td>
<td>Number of seats that have been deployed to specific user accounts</td>
</tr>
<tr>
<td>Active Seats</td>
<td>Total count of unique active users on a specific workload in the last 28 days</td>
</tr>
</tbody>
</table>

3.5.2 Filters

There are multiple filters provided in the report that allow you to view different level of data:

**Page Level**: when page level filters are used, the data in the entire report will be reflected based on this filter selection.

- **Partner Association Type**: Digital Partner of Record (POR), Transacting Partner of Record (TPOR), Delegated Admin Privilege (DAP), or FastTrack

**Chart level** filters allow you to choose a sub workload for each of the D365 products.
3.6 Power BI

The Power BI usage reports allow you to see your customers’ subscriptions, their current usage, as well as the historical usage (over the past twelve months).
4 Internal User Rights (IUR)

The IUR reports provide you with insights into the utilization of Cloud-based Internal Use Right products within your organization. Internal utilization is organized by product, and by whether the product is an IUR or commercially purchased. Your eligibility for IUR products is based on your competency status and it is available at the virtual organization level.
IUR vs Commercial: Both purchased (commercial) and non-paid subscriptions are included. Use this filter to show only Commercial or only non-paid IURs.

Active Usage Status by Cloud Product:
- Displays which IUR products the Partner is eligible for (based on their Membership status)
- Displays Yes/No based on if the Partner has revenues related to the product.

Subscription List: Details are available for viewing and download via “Export to Excel” at the bottom of the report:
5 Benefits

The Benefits tab provides insights into support benefits, including Advisor Hours, Signature Cloud, and Product support utilized by your organization. You will be able to view the number of hours used and remaining balance. You can also submit support tickets from this page.
6 Learning KPI

The Learning KPI report is designed for Learning Partners to help monitor their key performance indicators (KPIs) for Training, Exams and Courses.
7 Customer Opportunities

The Cloud Ascent Customer Opportunities tab provides you deep insights into renewals and customer opportunities for cloud products such as Microsoft Azure, Dynamics 365, Enterprise Mobility, Microsoft 365, Office 365 and SQL Server. Cloud Ascent is a data driven, easy-to-use customer targeting model that was created to deliver intelligent leads and deep customer insights to help partners capitalize on the opportunity in their install base.

The detailed grid shown below provides targeted list of customers ready for renewal and different tabs for each of the products - Microsoft Azure, Dynamics 365, Enterprise Mobility, Microsoft 365, Office 365 and SQL Server.
7.1 Key definitions:

<table>
<thead>
<tr>
<th>Measurement</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td># of Customers</td>
<td>Number of Cloud Ascent Customers</td>
</tr>
<tr>
<td># of Expiring Agreements</td>
<td>Number of Expiring Agreements</td>
</tr>
<tr>
<td>EA Expiring Revenue</td>
<td>Revenue from Enterprise Agreements that are expiring</td>
</tr>
<tr>
<td>Open Expiring Revenue</td>
<td>Revenue from Open Agreements that are expiring</td>
</tr>
</tbody>
</table>

7.2 Filters:
• **Product** – Dynamics 365, Enterprise Mobility, Microsoft 365, Microsoft Azure, Office 365, Microsoft

• **Area** – Includes the geographical area of the customer

• **Segment** – Includes Segment corresponding to the customer

• **Sub Segment** – Includes Sub Segment corresponding to the customer

• **Cluster** – Act Now, Evaluate, Nurture, Educate, No Info

### 7.3 Export to Excel:

There are two export to Excel options available on the Customer Opportunities page:

#### 7.3.1 All up export to Excel:

This is the complete Cloud Ascent TMW file previously available to the partners through PDMs. Click on the link shown below to start the export.

[Download the complete customer FY19 opportunities file](#)

**Please do not close your window or browser to another page while the export is in progress.**

[File name: Customer Opportunities_07_25_2019_10:00AM-feed-493-675d9e65a73f6a7b68bc3575a32436]

Rows exported: 14,700

Percentage: 60%

---

#### 7.3.2 Grid export to Excel:

This option exports all the records shown in the detailed grids with additional columns.

<table>
<thead>
<tr>
<th>Expirations</th>
<th>Microsoft Azure</th>
<th>Dynamics 365</th>
<th>Enterprise Mobility</th>
<th>Microsoft 365</th>
<th>Office 365</th>
<th>SQL Server</th>
<th>Export to Excel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer ID</td>
<td>Customer Name</td>
<td>Agreement ID</td>
<td>Agreement End Date</td>
<td>License Program</td>
<td>Expiring Revenue</td>
<td>Account Manager</td>
<td>Area</td>
</tr>
<tr>
<td>399395448</td>
<td>ARAMCO SERVICES COMPANY</td>
<td>XXXXXXXXX</td>
<td>03/31/2018</td>
<td>Open (Classic)</td>
<td>$7,623</td>
<td>DAGRAYS0</td>
<td>United States</td>
</tr>
<tr>
<td>399375479</td>
<td>SPARTE</td>
<td>XXXXXXXXX</td>
<td>10/31/2017</td>
<td>Open (Classic)</td>
<td>$3,845</td>
<td>N/A</td>
<td>United States</td>
</tr>
<tr>
<td>399375317</td>
<td>ABRA AUTO BODY AND GLASS</td>
<td>XXXXXXXXX</td>
<td>12/31/2018</td>
<td>EA</td>
<td>$1,228,980</td>
<td>MAWILS</td>
<td>United States</td>
</tr>
</tbody>
</table>
# 8 Reseller Summary

If you are a Distributor, the Reseller Summary view provides a quick and easy way to manage your reseller partners, and view business activity by reseller and geography. Access to reseller information may be available right from the dashboard.

As a Distributor, you can also view Cloud Product Performance by Reseller.
9 Data Refresh Cycles

Multiple data sources provide inputs with varying refresh intervals. This section defines how often data is refreshed within the Dashboard across Azure Consumption, O365, Dynamics 365 and Microsoft Intune as well as Active Use for O365 and EMS.

- **Azure Consumption Data:** Azure Consumption data is refreshed on **monthly basis**.
- **O365, Dynamics 365 and Microsoft Intune:** Subscription and seat data is refreshed on **daily basis**.
- **O365 Active Use:** Active use data is refreshed on **monthly basis**, and consists of following logic:
  - For all product categories, Active Use identifies all unique active users within a trailing 28-day window. Unique Active Users within this time period are compared to Total Qualified Entitlements by product category to calculate Active Use % value.
- **D365 Active Use:** Active use data is refreshed on **weekly basis**, and consists of following logic:
  - For all product categories, Active Use identifies all unique active users within a trailing 28-day window. Unique Active Users within this time period are compared to Total Qualified Entitlements by product category to calculate Active Use % value.
- **EMS Active Use:** Active use data is refreshed on **daily basis** and consists of following logic:
  - For all product categories, Active Use for MS Intune and AADP identifies the total amount of seats sold within each subscription. Where multiple subscriptions are sold under same tenant, Active Use values are allocated across each subscription with a maximum ‘cap’ value based on proportion of seats across each subscription.

You can check on the latest refresh by clicking on “View Data Refresh Detail” from the top of page.

![Data Refresh Details Table](image)
10 Release Summary

This section shows details related to all new releases happening over the time. Release Date of Impacted reports/section with high level details.

You can check on the latest deployments by clicking on “Release Summary” from the top of page.

### Release summary

<table>
<thead>
<tr>
<th>Release Date</th>
<th>Impacted report/reporting section</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>October 2017</strong></td>
<td>Cloud Services Dashboard</td>
<td>We’re pleased to announce the launch of My insights dashboard, the new dashboard that partners’ membership and cloud activities are transacted with Microsoft. The My Insights dashboard leverages Microsoft Power BI technology and combines the previous Summary and Cloud Services Dashboard reports and consolidates all the data into a single dashboard. Partners will be able to track their competency progress, review benefit consumption, and report consumption within this dashboard. The Training page has been updated to provide improved UI/UX and it is in alignment with...</td>
</tr>
<tr>
<td></td>
<td>Partner Summary report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>View My Dashboard/Training Report</td>
<td></td>
</tr>
<tr>
<td><strong>June 2017</strong></td>
<td>Cloud Services Dashboard</td>
<td>Update CRMOL to D365</td>
</tr>
<tr>
<td></td>
<td>Partner Summary report</td>
<td>Added ReaSumDivisions for D365</td>
</tr>
<tr>
<td></td>
<td>Cloud IUR report</td>
<td></td>
</tr>
<tr>
<td><strong>May 2017</strong></td>
<td>Cloud Services Dashboard</td>
<td>PCC Azure Adoption stages</td>
</tr>
<tr>
<td></td>
<td>Adoption stage details</td>
<td>PFBI Enhancements</td>
</tr>
</tbody>
</table>