

Autotask Live Report Writing Training Course Outline



1. Session 1

- a. Live Report mockup best practices
 - i. When and why to use a mockup
 - ii. Pre-mockup template
 - iii. A mockup template that works well
 - iv. How to build the mockup as the report is written
 - v. Create a pre-mockup based on a Real-World need
- b. Review of Autotask System Reports
 - i. Title review of what is in each category
 - ii. Copy a report that may have value to another folder
 - iii. Review copied report for lessons learned

2. Session 2

- a. Review of all categories
 - i. Discussion of when to use the category
 - ii. Review of the base Sub-category
 - iii. Review of each category diagram
- b. Express Report writing
 - i. Tab by tab walk through writing the Real-World report
 - ii. Run the report at the express level
 - iii. Update the Mockup
 - iv. Format and pretty up the Express Report



3. Session 3

a. Standard Formatting

- i. General
- ii. Number
- iii. Date
- iv. Text

b. Standard Report writing

- i. When to use a Standard Report
- ii. Converting Express Reports to Standard Reports
- iii. Convert Real-World report from Express to Standard
- iv. Adding, Modifying, Deleting, and moving Headers and Footers

4. Session 4

a. Formulas and Functions

- i. Aggregate
- ii. Operators
- iii. Logical
- iv. Date – date fields are text fields
- v. Financial
- vi. Database and Data Type
- vii. String
- viii. Formatting
- ix. Other

b. Hidden & Suppressed Data

- i. Sections
- ii. Columns
- iii. Rows
- iv. Cells
- v. Duplicates



- vi. Row Height
- vii. Column Info



5. Session 5

- a. Conditional Formatting
 - i. Background Color
 - ii. Bold/Italic/Underline
 - iii. Suppress Row/Section
 - iv. Page Break
 - v. White Font
- b. Detail filtering and slicing
- c. Header/1st data and footer/last data – but get it working

6. Session 6

- a. Scheduling & Publishing Reports
- b. Review

