

**pax8**Academy

# **MANAGING PROJECTS IN AUTOTASK**

Syllabus

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## Course Overview

Managing Projects in Autotask is a 4-week, live-instruction, virtual course that will guide you through the project management process in the Autotask PSA. The course will cover how to set up, schedule, and manage a project in Autotask. You will first learn how to initially set up a project (whether there is an existing proposal project in place or not) including the contract, revenue, and resource capacity initial settings.

Next, the instructor will show you the steps you need to take to get to the kickoff meeting including building the team and points of contact in Autotask and ensure there is visibility internally and externally. Finally, you will learn how to schedule (and reschedule), map out the phases and hierarchy of phases and tasks, and manage the ongoing metrics needed for a successful project.

The goal of this course is to enable Project Managers to use Autotask confidently to manage projects at their MSP from start to finish.

This course is designed for:

- Project Managers who use Autotask as their PSA
- MSPs who have recently started using Autotask
- MSPs who are looking to improve their project management with Autotask
- Pax8 Partners who have a basic understanding of project management at MSPs or have taken the Academy Instructor Led Course - Project Management

**It is recommended that you take the Pax8 Academy course Project Management, as the concepts you learn in that course will support your learning in this one.**

## What You'll Get

- 4 hours of virtual, interactive, instructor-led content taught by an expert in project management and Autotask.
- Downloadable videos\* of the content you can rewatch at your convenience.
- Downloadable slide decks, handouts, and documentation.

## Learning Objectives

By attending this course, Partners will learn:

- How to manage a project from start to finish in Autotask
- How to manage projects by exception using views, dashboards and workflows
- The project hierarchy and its phases, tasks, and checklists
- How to utilize capacity planning within the project team, through task types, workload reporting, and dispatching
- How to incorporate lines of business report utilization and profitability

\*Videos will either be recordings from your session, or they may be previously recorded material in which partner faces and voices have been removed. It is recommended to attend courses live to reap the full benefits of Q&A with the instructor and class.

## Schedule of Topics

### Session 1: Introduction

- Business Units
- Projects and implementations defined.

### Session 2: Project Setup

- Security Levels
- System Settings
- Project Statuses
- Task Categories, Statuses, and Notes
- Project Templates
- Workflow rules

### Session 3: Project Billing and Planning

- Project proposal activation
- Contract setup and contract milestone setup
- New Project setup – dates, associations, daily resource capacity, schedule settings, estimations, team setup
- Project Schedule hierarchy
- Task types, issues, and checklists

### Session 4: Management and inspection

- Scheduling toolbar
- Workload report
- Dispatch calendar
- Scope changes
- Task completion inspection

## Instructor



**Chuck Rich**  
Executive Coach

LinkedIn: <https://www.linkedin.com/in/chuck-d-rich/>  
Email: [crich@pax8.com](mailto:crich@pax8.com)

## Next Steps

Explore your next step with Pax8 Academy:

- On-Demand Content
  - [Strategic Time Management](#)
- Peer Groups
  - [Consider joining a Peer Group for Project Managers](#)
- Coaching
  - [Sign up for Business Coaching](#)