Track-It! 20x: Fundamentals Administering

COURSE ABSTRACT

COURSE CODE

» NUMA-TIAD-2022

APPLICABLE VERSIONS

» Track-It! 20.22 and 20.21

DELIVERY METHOD

» Instructor-led Training (ILT)

COURSE DURATION

» 4 Days

PREREQUISITES

» None

RECOMMENDED TRAININGS

» None

Course Overview

This 4-day instructor-led training class is designed specifically for those responsible for installing, configuring, and managing their Track-It! products. Attendees will learn how to apply help desk best practices to configure and manage their Track-It! products through workshop exercises

Target Audience

» Administrators

Learner Objectives

» Install and Configure Track-It!
» Administer technician accounts, security policies, and technician queues
» Examine lookup tables, work orders, and other tables
» Configure administration, help desk, solutions, and purchasing
» Examine the Directory Importer
» Examine workflow automation
» Examine Change Management
» Examine Discovery and Audit configuration and execution
» Examine Software License Management
» Configure the User Interface
» Configure Email Notifications

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COURSE ACTIVITIES

» Classroom Presentations
» Hands-on Lab Exercises
» Demonstration

BMC TRACK-IT! LEARNING PATH

» **https://www.bmc.com/education/courses/track-it-training.html**

ACCREDITATION AND CERTIFICATION PATHS

» This course is not part of a BMC Certification Path

DISCOUNT OPTIONS

» Have multiple students? Contact us to discuss hosting a private class for your organization
» **Contact us for additional information**

Course Modules

Module 1: Installation

» Server Requirements
» Client Applications
» Audited Platforms
» Installation Models
» Accessing Install Files and Licenses
» Installing Track-It!

Module 2: Configuration Panel Basics

» Overview / Navigation
» Viewing License and Support Details
» Configuring System Settings
» Enabling Windows Authentication
» Logging on to Track-It!
» Configuring Operating Hours

Module 3: User Accounts

» Technicians vs. Requestors
» User Account License Types
» Technician Account Overview
» Technician Groups Overview
» Configuring Technician Groups
» Technician and Group Permissions
» Requestor Accounts Overview
» Requestor Permissions

Module 4: Directory Importer Configuration

» Overview and Concepts
» Configuring Directory Service Integration
» Configuring Multiple Domain Support
» Setting Up Field Mappings
» Configuring Selection and Licensing
» Scheduling Imports
» Running Manual Imports

Module 5: Help Desk Configuration

» Ticket Form Overview
» Workflow Concepts
» Categories & Skill Routing Setup
» Configuring Priorities and Due Dates
» Configuring Statuses
» Departments and Locations
» Configuring Activity Codes
» Configuring Help Desk Custom Lookups

Module 6: Workflow Automation

» Email Conversation Overview
» Business Rules Overview
» Configuring Job Monitor Settings
» Using the Business Rule Event Viewer
» Configuring Business Rules
» Configuring Service Level Agreements

Module 7: Email Configuration

» Incoming Email Setup
» Outgoing Email Setup
» Configuring Email Filters

Module 8: Technician Portal

» Technician Portal Overview
» Grid View Functionality
» Customizing Grid Views
» Sharing Grid Views
» Tickets & Assignments Overview
» Parent & Child Tickets Overview
» Configuring the Dashboard

Module 9: Forms and Templates

» Customizing Forms
» Assigning Forms to Groups
» Creating Ticket and Assignment Templates
» Configuring Assignment Status Progression
» Scheduling Tickets and Assignments

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Module 10: Asset Management Module
- Overview
- Client Management Configuration
- Configuring Network Discovery
- Configuring Audit Agent Deployment
- Setting Up Asset Types
- Working with Asset Records
- Asset Form Overview

Module 11: Purchasing Module
- Overview
- Configuring Purchasing Settings
- Configuring Vendors
- Configuring Master Items
- Working with Purchase Orders

Module 12: Change Management Module
- Overview
- Understanding Change Management Roles
- Configuring Change Policies
- Configuring Change Management Notifications
- Configuring Change Decisions by Email
- Working with Change Requests

Module 13: Solutions Module
- Overview
- Creating Topics
- Creating Solutions
- Searching for Solutions from a Ticket
- Sending Solutions to Requestors
- Linking a Solution to a Ticket

Module 14: Self Service Page Configuration
- Setting Default Settings
- Configuring Appearance Options

Module 15: Reporting
- Report Types
- Running Reports
- Copying and Editing Reports
- Using the Report Wizard
- Printing Reports
- Exporting Reports

Module 16: Data Segregation
- Data Segregation Tool Overview
- Using the Data Segregation Tool

Module 17: Data Migration from Version 11.4
- Overview
- Data Migration Pros and Cons
- Starting Fresh Option
- Data Migration Options
- Module Data Refresh
- Using the Migration Tool

Module 15: Software License Management
- Overview
- Creating and Managing License Types
- Creating and Managing Publishers
- Creating and Managing License Sources
- Creating and Managing Software Titles
- Linking and Unlinking Products & Applications from Software Titles
- Linking Software Licenses to Software Titles