BMC Track-It! 20.x: Fundamentals Administering

COURSE ABSTRACT

COURSE CODE

» NUMA-TIAD-2020

APPLICABLE VERSIONS

» BMC Track-It! 20.20

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 BMC 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
» Review Data Migration

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COURSE ACTIVITIES

- Classroom Presentations
- Hands-on Lab Exercises

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 Acounts

- 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 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 Ticket Creation Rules
- Configuring Ticket Notification Rules
- Configuring Ticket Assignment Rules
- Configuring Advanced Business Rules
- Configuring Service Level Agreements

Module 7: Email Configuration

- Incoming Email Setup
- Outgoing Email Setup
- Configuring Email Filters

Module 8: Technician Interface

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

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Module 9: Forms and Templates
» Customizing Forms
» Assigning Forms to Groups
» Creating Ticket and Assignment Templates
» Configuring Assignment Status Progression
» Scheduling Tickets and Assignments

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
» Creating a Purchase Order
» Linking a Purchase Order to a Ticket
» Sending Purchase Orders by Email
» Receiving Items

Module 12: Change Management Module
» Overview
» Understanding Change Management Roles
» Configuring Change Policies
» Configuring Change Management Notification
» Configuring Change Decisions by Email
» Creating Manual Change Requests
» Linking a Change Request to a Ticket

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
» Creating a Solution from a Ticket Note

Module 14: Self Service Page Configuration
» Setting Default Settings
» Configuring Appearing Options
» Adding/Removing Fields
» Configuring Required Fields
» Configuring Custom Links

Module 15: Self Service for Requestors
» Logging on to Self Service
» Searching for Solutions
» Rating Solutions
» Creating a Ticket
» Viewing a Ticket
» Working with a Ticket
» Approving Change Requests

Module 16: Reporting
» Report Types
» Running Reports
» Copying and Editing Reports
» Creating Reports
» Using the Report Wizard
» Printing Reports
» Exporting Reports

Module 17: Data Segregation
» Overview
» Using the Data Segregation Tool

Module 18: Data Migration from Version 11.4
» Overview
» Data Migration Pros and Cons
» Starting Fresh Options
» Data Migration Options
» Module Data Refresh
» Using the Migration Tool

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