COURSE ABSTRACT

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
COURSE ABSTRACT

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 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 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
COURSE ABSTRACT

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