



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