

DAY ONE

- I. Numara® FootPrints® Overview**
 - A. Discuss the Numara FootPrints Key Features and Benefits
 - B. Understand the Numara FootPrints Core Concepts and System Architecture
 - C. Understand the Contents of the Numara FootPrints Homepage
- II. Installation and Workspace Wizard**
 - A. Plan for your Implementation of Numara FootPrints and Install Numara FootPrints
 - B. Understand and use the Numara FootPrints Workspace Setup Wizard
 - C. Select a Workspace Type
 - D. Complete the Workspace Setup Wizard Steps Resulting in a New Corporate Help Desk Workspace
- III. Working with Issues**
 - A. Define an Issue
 - B. Create an Issue and Add Issue Details
 - C. Work with the Issue List
 - D. Use the Quick Action Checkbox Dialog
 - E. View the Issue History
- IV. Advanced Issues**
 - A. Understand the Linear and Distributed Workflow Models
 - B. Create and Use Master Issues with Subtasks
 - C. Administer Master Issues and Subtasks
 - D. Create and Use Quick Issue and Master Issues with Subtask Templates
 - E. Create and Use Global Issues and GlobalLinks
 - F. Create and Use Quick Descriptions
 - G. Link Issues
 - H. Administer Dynamic Issue Linking Options

- V. User Preferences**
 - A. Customize Your Preferences Page
 - B. Configure Homepage Preferences
 - C. Configure Numara FootPrints Dashboard Preferences, Including Adding, Deleting, and Moving Components
 - D. Configure Issue Preferences
 - E. Configure Miscellaneous Preferences
- VI. Calendar and Scheduling**
 - A. Discuss the Calendar Function
 - B. Understand the Personal and Workspace Calendar Basics
 - C. Create an Appointment and Recurring Issues from the Calendar
 - D. Create an Appointment from an Issue
 - E. Create a Workspace Schedule
 - F. Manage Agent Schedules and Determine Agent Availability
 - G. Configure Calendar Preferences as an Agent
 - H. Sync appointments with Outlook

DAY TWO

- VII. Field Customizations**
 - A. Customize Issues
 - B. Configure Built-in Fields
 - C. Configure Priorities and Statuses
 - D. Create Custom Fields and Customize the Create/Edit Issue Screen Layout
 - E. Set Field Level Permissions
- VIII. Dependency Fields**
 - A. Pop-Up Dependencies
 - B. Dynamic Drop-Down Dependencies
 - C. Generate a Drop-Down Dependency Summary Report

- IX. Searching and Reporting**
 - A. Quick Searches and Built-In Queues
 - B. Advanced Searches Using Issue, Contact, and Advanced Criteria
 - C. Reporting Overview
 - D. Custom Non-Metric Reports
 - E. Custom Reports with Metrics and Graphics
 - F. Format Custom Charts with Controls, Colors, and Charts
 - G. Configure the Auto-Run Reports
 - H. Customize the Personal/ Workspace Flashboard
 - I. Create Quick Issue Report Templates
- X. Work With Users**
 - A. Understand the Different Types of Numara FootPrints Users and License Types
 - B. Create Numara FootPrints Users
 - C. Create and Edit Agents and Customers
 - D. Auto-Add Customers
 - E. System Administration User Management Options
 - F. Team Creation and Administration
 - G. Create Agent and Customer Roles
 - H. Create and Use Agent Preference Templates
 - I. Authentication Methods

DAY THREE

XI. Address Book Management

- A. Navigate the Numara FootPrints Address Book
- B. Address Book Types and Custom Address Book Fields
- C. Create, Customize, and Export Contacts
- D. Define and Use the Master Contact Record
- E. Use the LDAP Address Book
- F. Run Searches and Reports
- G. Send Mass Email

XII. Use the Numara FootPrints Knowledge Base

- A. Add Solutions to the Knowledge Base
- B. Approve Knowledge Base Solutions and Understand the Approval Workflow
- C. View Solutions
- D. Solutions Popularity
- E. Import Solutions from the Knowledge Base into Issues
- F. Knowledge Base Category Administration
- G. Running Knowledge Base Statistics and Lifecycle Reports
- H. Manage External Knowledge Bases
- I. Exclude Fields from Solutions

XIII. Customer Self-Service

- A. Work with Requests Using Customer Self Service
- B. Submitting Requests via Email
- C. Instant Talk
- D. Configure Customer Options
- E. Enable and Use Auto-Add Customers
- F. Enable and Use the Forgot Password Link

XIV. Customer Satisfaction Surveys

- A. Importance of Customer Satisfaction Surveys
- B. Create a Customer Satisfaction Survey Workspace
- C. Add, Edit, and Delete Survey Questions

XV. Email Management

- A. Outgoing Email Configuration and Templates
- B. Email Notification Rules
- C. Incoming Email Configuration
- D. Using Incoming Email
- E. Email Filters

XVI. Workflow Automation

- A. Field-Based Issue Auto Assignment
- B. Create AutoField Rules
- C. Create a Mathematical Formula with InstaCalc Fields
- D. Escalation Rules
- E. XML/SOAP Interface
- F. Submission Tracking
- G. Preventive Maintenance
- H. Configure Attachment Rules

DAY FOUR

XVII. Service Level Management (SLA)

- A. Define and Configure SLAs
- B. Edit the Pending Status List
- C. Generate SLA reports

XVIII. Administration Options

- A. Configure System Administration Options
- B. Configure Workspace Administration Options

XIX. Data Administration

- A. Issue Importing and Exporting
- B. Export Issues
- C. Archive and Purge Issues

XX. Review for and Take the Certified Numara FootPrints Administrator Exam