

Successful completion of “Using Numara Track-It!” training is required for this course.

DAY 1

- I. Review “Using Numara® Track-It!®” Concepts
- II. Install Numara Track-It!
 - A. Installation Prerequisites
 - B. Installation Models
 - C. Install Numara Track-It!
- III. Administering Technician Access to Numara Track-It!
 - A. Create Technician Accounts
 - B. Understand Security Policies
 - C. Modify the Default Security Policy
 - D. Create Security Policies
 - E. Assign Technicians to a Security Policy
 - F. Create Technician Queues
- IV. Data Setup and Database Concepts
 - A. Understand the Numara Track-It! Lookup Tables
 - B. Categorize Work Orders
 - C. Define Work Order Priorities
 - D. Remaining Lookup Table Discussion
 - E. Discuss the other Significant Numara Track-It! Tables
 - F. Backup Numara Track-It! Data
- V. Configuring Numara Track-It!
 - A. Understand the Numara Track-It! Administration Console
 - B. Configure Administration Options
 - C. Check for Updates
 - D. Configure Help Desk Options
 - E. Configure Purchasing Options
- VI. Using the Directory Importer
 - A. Directory Importer Overview
 - B. Select a Directory Service
 - C. Import Technicians and Uses while Assigning Licenses
 - D. Understand the Field Mapping Options
 - E. Automate the Import Schedule

DAY 2

- VII. Setting Up Workflow Automation
 - A. Understand Event Policies
 - B. Determine Email Notification Options for Event Policies
 - C. Create an Event Policy
 - D. Understand and Create Service Level Agreements
 - E. Understand and Create Skill Routing Policies
 - F. Understand and Create Work Order Templates
- VIII. Setting Up the Change Management Module
 - A. Change Management Overview
 - B. Define Different Types of Change
 - C. Classify Change Requests
 - D. Understand Change Management Roles
 - E. Set Up Change Management Policies
 - F. Configure Notifications for Change Management Events
 - G. Customize Notification Templates for Change Management Events
 - H. Schedule Notifications for Change Management Events
- IX. Numara Track-It! Discovery and Audit
 - A. Manage IT Assets
 - B. Discuss Asset Discovery Options
 - C. Configure Asset Discovery
 - D. Schedule Asset Discovery
 - E. Manage Your Discovered Assets
 - F. Understand Audit and Audit Components
 - G. Use the Administration Console to Configure Audit Options
 - H. Configure Audit Execution
 - I. Schedule Automatic Auditing
 - J. Specify Scan Criteria
 - K. File Capture Information
 - L. Set up Credentials for Windows Installation
 - M. Merge Audit Results
 - N. Perform a Distributed Audit
 - O. Change the Audited Software Approval Status

DAY 3

- X. Setting up Software License Management
 - A. Software License Management Overview
 - B. Software License Management Process Flow
 - C. Set up the Software Module Lookup Tables
 - D. Define Software License Management Options
 - E. Create software Titles and Licenses
 - F. Associating Software Titles with a Master Item
 - G. Notifying Technicians When License Conditions Change
- XI. Configure the User Interface
 - A. Select a Default Language
 - B. Use the Field Options Dialog
- XII. Configure Numara Track-It! Email Automation
 - A. Configure Track-It! Email Monitor
 - B. Configure Track-It! Work Order Notification Templates
 - C. Configure Manual Work Order Notification
- XIII. Review for and Take the Certified Track-It! Administrator Exam