NUMARA software

Using Numara Track-It! Syllabus

DAY 1

I. Navigate Numara Track-It!

A. Introduction to the Numara Track-It! Enhanced User Interface
B. Launch Numara Track-It!
C. Numara Track-It! Modules Overview
D. Work with the Home Page
E. Explore the Menu Bar
F. Customize the Numara Track-It! Interface Look and Preferences
G. Work with Numara Track-It! Windows
H. Work with Grids
I. Work with Grid Views
J. In-Product Help Options
K. Getting the most from Numara Track-It! Support
L. Discuss the Numara Track-It! Search Tool Capabilities

II. Inventory Module

A. Discuss the Uses of the Inventory Module
B. View Asset Information
C. Save Hardware Tab Views
D. Maintain Asset Users
E. Add Inventory Information Manually
F. Audit-on-Demand, Delete, and Copy an Asset
G. Use the Search Tool to Find Assets

III. Software Licenses Module

A. Discuss the Uses of the Software Licenses Module
B. View Software Title Information
C. View Software License Information

IV. Purchasing Module

A. Set up Your Purchase Orders View
B. Create, Edit, Delete, and Copy Purchase Orders
C. Transmit Purchase Orders
D. Receive Full or Partial Purchase Orders
E. Create Purchase Orders that Include Software Licenses
F. Create a Blanket Purchase Order
G. View Purchase Order History

DAY 2

I. Help Desk Module

A. Set up Your Work Order View
B. Create Work Orders
C. Add Work Order Details
D. Create Work Orders from a Template
E. Understand Workflow Models
F. Create Work Order Assignments
G. View Work Order Assignments
H. Edit, Complete, Copy, and Delete Work Orders
I. Create a Work Order Using a Template
J. Utilize Automatic and Manual Notifications
K. Use the Search Tool to Find Work Orders

II. Solutions Module

A. Use the Solutions Database
B. Access, Add, Edit and Delete Solutions
C. Reorganize Topics and Solutions
D. Access Solutions via a Work Order
E. Add a Solution to a Work Order
F. Create a Solution via a Work Order Resolution

III. Use the Web Components

A. Understand the Web Components
B. Use the Field Tech Web Interface
C. Use the Self Service Interface

IV. Change Management Module

A. Change Management Overview
B. Define the Different Types of Change
C. Discuss Change Management Roles
D. Manage Requests for Change
E. Manually Create a Request for Change

V. Training Module

A. Training Overview
B. Schedule End User Training

DAY 2 (Continued)

VI. Library Module

A. Add Items to the Library
B. Track Library Items
C. View Library Item History

VII. Information Analysis

A. Information Analysis Overview
B. Navigate the Crystal Reports Viewer
C. Exporting Selection Criteria to a Report
D. Work with the Track-It! Dashboard

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