

### DAY 1

#### I. Navigate Numara Track-It! 9

- A. Introduction to the Numara Track-It! 9 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