



HEAT Training Summary

Last Modified 5/1/2006

HEAT System Administrator Training

Course Length: 5 Days (lecture/lab)

Course Description:

The HEAT System will be approached from the perspective of an Administrator/User. The skills to effectively navigate throughout HEAT will be covered as well as the Administrator features including customization and maintenance. The management tools that come with HEAT, which include Auto Ticket Generator, Business Process Automation Module, Answer Wizard, Manager's Console, and HEAT Alert will also be discussed. Areas that will be covered include:

- Creating and updating call records
- Maintaining Profile and Configuration records
- Using Call History Information
- The concepts of data sources and edit sets
- Screen layout and design to include Profile, Subset, Detail, and Configuration tables
- Design and use of Validation tables
- Using View Sets
- Connecting to External Tables
- Backing up and database disaster recovery
- Setting security
- Importing and exporting between HEAT databases
- Defining and running escalations
- Using Manager's Console to manage the help desk
- Using First Level Support
- Defining Auto Ticket Generator to use email to create tickets
- Requesting reports through Answer Wizard
- Defining LDAP Link to HEAT

Student Profile and Prerequisites:

This course is designed for HEAT System Administrators/users who will be responsible for designing and maintaining their HEAT System. They should have user knowledge of Microsoft Windows® operating system.



HEAT Training Summary

Last Modified 5/1/2006

HEAT Technician Training

Course Length: 2 Days (lecture/lab)

Course Description:

The HEAT System will be approached from the perspective of a Technician/User. It is an intensive, beyond the basics exploration of HEAT's Call Logging, Alert Monitor, and Knowledge Management (First Level Support or HEAT Plus Knowledge) modules. It is intended for those individuals who directly support HelpDesk activities, including call takers and assignment technicians. Areas that will be covered include:

- Navigating the screens of the Call Record and Customer Record side of HEAT
- Create, modify, and delete call records as well as profile, config, contacts, and validation table records
- Configure User Preferences
- Create call groups and hot lists; perform Boolean searches of profile and fielded data.
- Build Autotasks
- Understand and be able to use every menu option available in Call Logging
- Search an FLS knowledge tree, post solutions to Call Logging, and perform Auto-population activities
- Configure Alert Monitor to personal specifications

Student Profile and Prerequisites:

This course is designed for HEAT Technician/users who will be responsible for Call Logging. They should have user knowledge of Microsoft Windows® operating system.



HEAT Training Summary

Last Modified 5/1/2006

Asset Tracker Training

Course Length: 2 days

Course Description:

HEAT Asset Tracker is an automated asset tracking solution that allows you to gather and maintain asset management data, and view asset information from within HEAT. In this 2-day course you will learn:

- Overview of Asset Management
- Tracking Manager
- Asset Details along with reviewing best practices in asset management
- Capture immediate and accurate hardware and software data to populate the data repository
- Data management using Tracking Manager
- Software licensing
- Moves, adds and changes, upgrades, repairs and hardware retirement
- Access the data through reporting
- Customize Tracking Manager
- Work with Asset Details from both HEAT and Tracking Manager
- Access asset information for a specific customer
- Populate a HEAT trouble ticket to track specific customer issues

Student Profile and Prerequisites:

Experience with MS Windows. Close contact with the HEAT Administrator, or an understanding of the HEAT database is helpful in setting up the interface between Asset Tracker and HEAT.



HEAT Training Summary

Last Modified 5/1/2006

HEAT Plus Knowledge

Course Length: 2 Days (lecture/lab)

Course Description:

HEAT Plus Knowledge offers a web-based solution for storing, authoring, and sharing knowledge. In this two-day course you will learn how to install/configure HEAT Plus Knowledge as well as integrate the HEAT Knowledge Connector with Call Logging and HEAT Self Service for a comprehensive knowledge solution. Also, you will learn how to manage content network links, content services and content collections; establish a workflow for new knowledge, and evaluate knowledge site security needs.

- Introducing HEAT Plus Knowledge
- Installing HEAT Plus Knowledge
- Configure HEAT Plus Knowledge
- Integrate HEAT Knowledge Connector with Call Logging
- Integrate HEAT Knowledge with HEAT Self Service
- Administrating HEAT Plus Knowledge
- Using the Library Manager
- Managing Content, links, service, and collections
- Establishing knowledge workflows
- Review security site needs
- FLS to HPK Migration
- Upgrading HPK
- Knowlix to HPK Migration

Student Profile and Prerequisites:

This course is designed for HPK Administrators/users who will be responsible for maintaining their Knowledgebase System. They should have user knowledge of Microsoft Windows® operating system.



HEAT Training Summary

Last Modified 5/1/2006

Advanced Crystal Reports Training

(Designing HEAT Reports with Seagate's Crystal Report Designer®)

Course Length: 3 days (lecture/lab)

Course Description:

This course acquaints the student with the tools Crystal provides for building a reports, plus gives the student experience in using these tools and techniques against a HEAT database. The course provides a foundation upon which a student can grow. Even for those with Crystal Report writing experience, this course provides a powerful refresher for report design against the HEAT database. Topics will include:

- Initial Default Settings
- Connecting to a HEAT database
- Inserting fields onto a report
- Formatting text, number, and date fields
- Creating and Using formulas
- Duration Calculations
- Using multiple tables
- Using Select Expert to pull only needed data
- Grouping data
- Counting records
- Creating Charts and graphs
- Inserting sub-reports
- Formulas for complex situations
- Creating percentages
- Calculating unsaved activities
- Report Expert tools (Cross-Tabs, Mailing, Labels, etc.)
- Troubleshooting

Student Profile and Prerequisites:

This course is designed for HEAT System Administrators or anyone who will be responsible for creating reports using Seagate Crystal Reports™. A student taking this course should have user knowledge of a Microsoft Windows® operating system and an understanding of their HEAT database.

Course Agendas are available upon enrollment. We train the students on customer site using customer system and configuration or at BAI Training Center in Alpharetta GA using standard HEAT system and configuration.



HEAT Training Summary

Last Modified 5/1/2006

BAI Tune-Up

BAI strongly encourages all HEAT customers to have the HEAT Tune-Up on their system between the 1st and 2nd year of operation. This allows the customer to make sure their installation is running at full efficiency. It is entirely up to the customer whether to take advantage of this service or not.