



# DEMO ROOM

First steps with OMNITRACKER

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# Welcome

## About the demo room

In our demo room, you can test the OMNITRACKER platform and, among other applications, our ITSM tool. This way, you get an overview of selected features and the user interface. Furthermore, it is possible to test practical processes directly in OMNITRACKER.

In the demo room, the individual configuration of all processes in OMNITRACKER is locked. That means, you can test all processes in the standard configuration, but you cannot change this configuration in the demo environment. The full version of OMNITRACKER offers extensive possibilities to customize process components, forms and data models.

## Data in the demo room

During the entire test period, the demo room remains reserved exclusively for you. Entered or changed data will be retained just for the duration of your test period.

Please note that your entries are automatically deleted when the test duration expires. The demo room will be set back to its initial state. Please contact us before your trial period expires if you would like to use the demo room for a longer period.

# Roles & functions

In our demo room, two basic user roles are available, each using different tool features. This demonstrates OMNITRACKER functions from different perspectives in practical workflows.



## Web client

Use OMNITRACKER with any device.

Your access data  
User: pbo  
Password: pbo

Los geht's

## Web client

You use OMNITRACKER from the perspective of the service provider or service desk.

In the role of Peter Boss, you will control basic ticketing processes. You can also create projects, go through approval processes, work on and close tickets by yourself.



## Self-Service portal

Use the self-service portal to process all tickets in a structured manner.

Your access data  
User: steve  
Password: Soft

Los geht's

## Self-service portal

You use OMNITRACKER from the point of view of the end user or customer who creates tickets and therefore contacts the service desk.

As Steve Soft, you use the ticketing tool to report an incident by yourself. You open a ticket in the self-service portal and can, for example, view all incidents.

ITSM +

With our applications, you can extend the functional scope of your software system and also efficiently manage services outside of IT.

Each application has a self-contained functionality and fully maps a business process. With OMNITRACKER information flows across and between all processes and applications.

# Sample processes

In our demo room, you can run through individual processes in a test environment. For example, you can create a ticket in the self-service portal. Afterwards, you can see a list of all tickets, including the ticket you just created.

Another example is the creation of a project with a wizard in our project management application. Via the wizard, you select a project template. The project phases and activities contained in the template are applied automatically.

The tutorial videos in our demo room website give you an overview of the user interface and show you some fundamental features.

## Create a ticket in the self-service portal

You can create new tickets in the OMNITRACKER IT Service Management Center via the self-service portal as follows:

1. On the landing page of the self-service portal, click on the tile with the title Log an issue. Alternative ways to start this process can be found in the shortcut bar on the right side or by using the button New Ticket at the top of the page.
2. There are two mandatory fields: You have to enter a title for your issue as well as a description. Enter a title and a description in the ticket entry form.
3. Select or change the affected person.
4. It is possible to change your preferred way to be contacted. Default is via email.
5. You can also enter the service that is affected via the plus button.
6. It is possible to add an attachment, e.g. a screenshot of your problem or request.
7. Click on the OK button at the top of the entry form to create your ticket and to close the form.

The new issue is saved. When you want to see a list of all of your tickets, you can click on the tile My Tickets / Orders in the landing page of the self-service portal. Here, you can review, add some information and check the state of your tickets. You can get to this section also via the shortcut bar and via the buttons next to your avatar.

## Create a project by using a wizard

You can create a new project in the OMNITRACKER Project Management Center by using a project wizard.

1. Open the group PMC - Project Management in the shortcut bar.
2. Click on the entry New Project (via Wizard).
3. Select the project type Standard and click on the Next button to proceed.
4. Select a template from the list and click on the title of the template. Please do not click on the link of the template number for this sample process. However, you can click on the arrow button at the beginning of each list entry to get more information about a specific template.
5. After clicking on the title of a template, you can click on the check symbol above the list to copy the selected template's title and description into your form. Click on the Next button below.
6. In the next step, tick the box Search and Replace. Enter the title of the project in the field Replace by. Determine a start date of your project.
7. For the Responsible (PR) and Responsible (AT) fields, please select the responsible person(s) for the project and the project phases (PR) and for the activities (AT). Use the drop-down menu to find a specific person or role. Click on Next.
8. Click on Create Project.

The new project is created based on the selected template and your specific information. If you want to see the list of your projects, please click Open Projects in the shortcut bar of the PMC section. Your recently created project will also be displayed in the list, you can filter the list by Last Change to find it. By clicking on a project here, you can add information and work on that project.

# Application overview

The demo room is available in two versions. Our applications for ITSM and project management are included by default.

Contact us if you would like to test our other applications.

## IT Service Management Center

ITIL®-compliant service management platform with comprehensive ticketing functions for the processing of incidents and service requests

## Project Management Center

Support and more structure in all phases of agile and traditional project planning and execution

## Contract Management Center

More transparency in the creation, reviewing process and provision of contract documents

## Risk Management

Professional risk management according to ISO 31000 to avoid or minimize damage

## Stock and Order Management Center

Optimization for warehouse and logistics processes from the order in the (online) shop to delivery

## Sales Management Center

Support in the lead management and during the entire process of sales projects

## Task Management

Coordination, monitoring and evaluation of tasks and activities, even in complex projects

## Dispatch Center

Dispatch of field service staff with integrated route planning and geocoding

## Systems Engineering Center

Control of complex software development projects from requirements management to the release

## Booking Schedule

Booking management for any resources (e.g. rooms, vehicles) with time lines and calendar views

## GDPR Anonymisierung-Center

Support in the DSGVO/GDPR-compliant processing and storing of sensitive data

## Document Management Center

Organization-wide provision and archiving of documents with detailed reading and writing permissions

# Guided Demo

You can also make an appointment for a detailed product presentation (remote or on site at your company).

Phone: +49 (9126) 25979-700

Email: [crm@omninet.de](mailto:crm@omninet.de)



## Contact us

If you have any questions about OMNITRACKER or if you need more information, please do not hesitate to contact our CRM team.

Phone: +49 (9126) 25979-700

Email: [crm@omninet.de](mailto:crm@omninet.de)

## Contact

**OMNINET Software-, System- und Projektmanagementtechnik GmbH**

Dr.-Otto-Leich-Straße 3  
90542 Eckental  
+49 (9126) 25 979-0

[www.omnitacker.com](http://www.omnitacker.com)