Szkolenie: Micro Focus
SM350 - Service Manager Advanced

Cel szkolenia:

This class is targeted at system administrators and consultants responsible for configuring and tailoring Service Manager for a customer’s environment. The course focuses on the tools and utilities used to tailor a Service Manager system. The course is 50% lecture and 50% hands-on exercises.

This course is designed for users who are experienced with Service Manager or have taken one of the level 100 courses (Technical Configuration or Foundations for Process Owners).

Upon successful completion of this course, you should be able to:

Plan for ALM implementation

- Use the Database Manager utility to add, modify, and delete records and to load and unload records
- Use the Database Dictionary utility to add fields and keys to tables
- Describe the Service Manager System Language and how it is used
- Use the Unload Script utility to unload data (for example, to migrate to another system)
- Use Data Policy to enforce data integrity at the table level
- Use Forms Designer to add and modify forms
- Describe the functions of the System Definition utility and use the System Definition utility to add fields to an existing form
- Use the RAD Debugger to troubleshoot an application and display the value of variables
- Describe how JavaScript is used by the various Service Manager utilities
- Describe Dynamic View Dependencies
- Use the Global Lists utility to create and maintain dynamic and user-defined lists
- Describe the components of Process Designer
- Use Process Designer to build workflows, configure business rules, create task plans, and implement security
- Use the Format Control utility to implement business rules
- Use the Display Applications utility to modify buttons and drop-down menus
- Use Links to establish relationships between tables
- Create and configure views
- Describe how the To Do queue is populated and how application queues are configured

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- Create menus and dashboards
- Describe the components of the Document Engine
- Create and modify wizards
- Describe how the alert and notification engines work
- Describe how to import and export data
- Use activity actions to audit and track changes to specific fields for open, update, and close activities

Audience/Job Roles

Administrators, developers, and managers who are responsible for configuring and tailoring Service Manager.

Plan szkolenia:

- Introduction to Service Manager
  - Course Objectives
  - Class Schedule
  - Daily Schedule
  - Participants' introductions
  - Class Logistics
  - VILT Instructions
  - Virtual Lab Instructions
- Introducing Service Manager Utilities
  - List the foundation knowledge components needed to use the Service Manager utilities
  - Describe the base utilities designed to edit records in tables and forms
  - Describe the utilities used to configure features of Service Manager, such as configuring notifications
- Managing Data
  - Access the Database Manager utility
  - Use Database Manager to manage records in a table (add, updated, delete)
  - Use Database Manager to mass update records
  - Access the Database Dictionary utility
  - Add field names and keys to an existing table
  - Add a new table
  - Use keys to tune performance
  - Identify Service Manager data types and variables
  - Identify the role of current file variables in Service Manager applications

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- Identify operators that perform selected system operations
- Identify the characteristics of functions and expressions
- Access the Unload Script utility
- Describe the features and uses of the Unload Script utility

- Introducing Data Policy
  - Access the Data Policy option
  - Identify data policy rules
  - Modify a data policy record to filter data
  - Verify data policy changes
- Using Forms Designer
  - Describe the functions of the Forms Designer
  - Add fields to an existing form
  - Create a new table using the Form wizard
  - Collapse sections
  - Convert existing tabs to collapsible sections
  - Describe the functions of the System Definition utility
  - Add fields to an existing form
- Implementation Tools
  - Describe the purpose of the RAD Debugger
  - Identify how to display variables
  - Set and display values using the RAD Debugger
  - List basic JavaScript rules
  - Identify which Service Manager utilities use JavaScript
  - Identify the main features of the Script Library table
  - Describe the JavaScript syntax color codes
  - List additional resources for more information
- Understanding Dynamic View Dependencies
  - Identify the condition properties for setting Dynamic View Dependencies (DVD) conditional statements
  - Specify the field comparisons, field value matching, and dynamic functions for a property
- Global Lists
  - Create and display global lists
  - Access the Global Lists utility
  - Configure the Global Lists utility
  - Explain how global lists work
- Overview of Process Designer

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- Describe the Process Designer components
- Describe the two different Service Manager 9.4 modes (Classic and Codeless) and which Process Designer modules and components are included with each mode
- Create workflows using the Workflow Designer
- Use the Business Rules Editor to implement business logic
- Use Format Control and Display Application to implement business logic
- Describe the Process Designer Security Model
- Use the Task Planner to create tasks

- Establishing Links
  - Define links
  - Describe how links are used
  - Distinguish between simple and complex links
  - Restrict access to find and fill functions
  - Describe the relationship between pop-up hover forms and link records
  - Create virtual joins to display data from supporting tables
  - Identify the steps to configure a virtual join
  - Create a virtual join with a table object
- Modifying Queues and Views
  - Define views
  - Create a view using the wizard
  - Create a view from a query
  - Identify the key components for views
  - Describe the features of the application queues
  - Describe where the object records define the default queues
  - Describe the relationship between the operator record profiles and query groups with the audience views
  - Describe how the default To Do queue works
  - Describe how the TodoMap populates data in the Todo table
  - Modify the TodoMap table
  - Modify the default Views for the To Do queue
- Working with Menus and Dashboards
  - Describe the function of the Menu Manager utility
  - Modify the menu navigation within System Navigator
  - Describe how dashboards works
  - Summarize dashboard limitations
  - List the underlying components
- Navigating the Document Engine

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- Navigate the Document Engine
- Access the Document Engine
- Describe Objects
- Describe States
- Describe Processes

- Introducing Wizards
  - Describe the features and functions of wizards
  - Modify an existing wizard
  - Describe how wizards interact with Format Control
- M Understanding Alerts and Notifications
  - List the components of the Notification Engine
  - Describe how the notifications are invoked
  - Set up and modify notifications
  - List what variables are used and where they get defined
  - Describe how notifications are processed
  - Identify which Service Manager modules use alerts
  - List the components of the alert engine
  - Describe how the alerts are invoked
  - Describe how to configure and modify alerts
  - Describe how alerts are processed
- Integrating with the Import/Export Utilities
  - Export data from Service Manager
  - Import data to Service Manager
- Application Auditing (Activity Actions)
  - Identify the types of auditing used in Service Manager
  - Identify application and system fields used for auditing
  - Identify alternative auditing applications
  - Define an activity action
- Tips and Tricks
  - Find the login connection history
  - Clear the command history
  - Search for and add commands
  - Access useful RAD routines

Wymagania:

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following courses:

- SM150 – Service Manager 9.x Technical Configuration
- SM110 – Service

Poziom trudności

Certyfikaty:

The participants will obtain certificates signed by Micro Focus (course completion).

Prowadzący:

Authorized Micro Focus Trainer

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