Szkolenie: Micro Focus

SMAX300 - SMAX Technical Configuration for Service or Process Owners

Cel szkolenia:

This course covers how a Service or Process Owner will use the Service Management Automation X (SMAX) agent interface to sponsor, design, document, publicize, and continuously improve different processes by ensuring compliance with enterprise policies. SMAX is a new suite designed to simplify the way businesses manage their IT services and assets. It uses the Information Technology Infrastructure Library (ITIL)-compliant IT processes with embedded machine learning and contextual analytics.

You are a service or process owner who wants to design catalog offerings for an online bookstore with defined targets, create knowledge materials for easy usage of this offering and handle any issue, provide ideas, derive proposals for a project, program, and application portfolio implementation. You are going to follow through creating, categorizing, prioritizing, managing, and collecting, through to tracking these comprehensive helpdesk solution processes that manage support and service requests, incidents, change requests, and problems. You are new to SMAX.

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

- Describe the basic architecture of SMAX
- Explore Service Catalog Management module
- Explain service catalog relationship with SACM model
- Create a service catalog category
- Create a service definition
- Create a service offering
- Create a support offering
- Create a human resource offering
- Create a bundle offering
- Add a fulfillment plan
- Create a holiday and work schedule
- Create a service level target set and update target definitions
- Create a support agreement
- Create a service agreement
- Create an Operational Level agreement
- Perform a global search for knowledge
- Create an article model

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- Create a knowledge article
- Review, modify, and preview a knowledge article
- Publish a knowledge article
- Archive a knowledge article
- Publish an IT News Article
- Moderate questions and answers
- Analyze self-service portal knowledge searches
- Create a support offering from a hot topic user question
- Create a knowledge article from a hot topic support request
- Create a New Survey
- Prepare a survey for execution
- Test the new survey manually and analyze survey data
- Set up on-call schedule management
- Set up an assignment strategy and manage notifications
- Create a new idea
- Create a new business objective and resource type
- Create a new proposal
- Use proposal analytics to analyze proposal data
- Navigate the executive summary dashboard
- Create a project
- Plan a project
- Execute a project
- Create and edit a program
- Create and edit a project portfolio
- Create and edit an application record
- Create and edit a portfolio record
- Create an optimization record
- Review optimization record details
- Create a proposal from an optimization record

Audience/Job Roles

This course is intended for Service or Process Owners.

Plan szkolenia:

- Lesson 1: Course Overview Introduce the course overview, agenda, and logistics

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    - List the available SMAX courses
    - Launch the Digital Learning course
    - Access the lab environment
- Lesson 2: Service Catalog Management
    - Explain the SMAX architecture overview
    - Explore the Service Catalog module
    - Explain service catalog relationship with SACM model
    - Explore the service catalog hierarchy
    - Create a service catalog category
    - Create a service definition
    - Create a service offering and explain about governance approvals
    - Create a human resource offering
    - Understand about private and confidential requests.
    - Learn about human resource knowledge articles, and additional configuration for the HR application
    - Create a bundle offering
    - Understand and create a fulfillment plan
    - Learn about approval plan, task plan, automated/manual task, user options, and default values.
    - Use expression language for defining conditions
    - Understand approval strategy
- Lesson 3: Service Level Management
    - Access the Service level Management area
    - Explore service level management structure
    - Explain dynamic selection of SLA
    - Understand about time periods
    - Create a new holiday and work schedule
    - Explain service level target by target type, duration, and records type
    - Create a new service level target set and update target definitions
    - Create a support agreement
    - Create a service agreement
    - Create an operational level agreement
    - Understand OLA priority grouping toggle
- Lesson 4: Knowledge Management Access the knowledge management area
    - Explain about knowledge management architecture
    - Explain knowledge articles
    - Understand proactive suggested solutions and module integration

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    - Explore global search of articles
    - Create an article model
    - Explain article management – Workflow phases, audience for article content visibility, audience to restrict articles, article localization, and indexing.
    - Create a new article
    - Review, modify and preview a knowledge article.
    - Publish and consume a knowledge article
    - Archive a knowledge article
- Lesson 5: IT News, Q&A, and Hot Topic Analytics
    - Navigate knowledge management area
    - Explain different knowledge components – IT news, Q&A, and hot topic analytics
    - Define and publish an IT news (Hot news)
    - Explain ask and help friends.
    - Manage, moderate questions and answers from users
    - Explore hot topic area, refine the results of the hot topic map.
    - Understand hot topic algorithm, manage stop list
    - Analyze the service portal knowledge searches
    - Create a catalog offering from a hot topic user question.
    - Create a knowledge article from a hot topic support request
- Lesson 6: Survey and On-Call Management
    - Access the Survey Management area
    - Explain about Survey Management module
    - Set up a new survey
    - Prepare a survey for execution
    - Understand about survey reports
    - Understand different ways to conduct a survey – sending a survey manually or sending a survey automatically using a business rule
    - Explore hot topic analytics in survey management
    - Access On-call schedule management area
    - Set up agent schedule, vacation for a functional group with group members
    - Understand about on-call rotation
    - Setup an assignment strategy for a functional group
    - Manage notifications at the agent level
- Lesson 7: Idea and Proposal Management
    - Access idea and proposal management area
    - Explain about hot ideas in self-service portal and agent interface
    - Create a new idea

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    - Understand about business objectives and resource types
    - Explain proposal management
    - Create a new proposal
    - Explore budget, financial planning, and resources for the proposal
    - Use proposal analytics to analyze proposal data
- Lesson 8: Project and Program Management
    - Access project and program management area
    - Explore the overall status of the projects, programs and the portfolios
    - Navigate and describe the executive summary dashboard
    - Explain project management
    - Create, plan and execute a project
    - Understand the resource demand, timeline, financial planning, risks, and issues required to run a project
    - Explain program management
    - Initiate, plan and execute a program
    - Understand the resource demand, timeline, financial planning, risks, and issues required to run a program
    - Explain project portfolio management
    - Create and edit a project portfolio
    - Learn about project optimization scenarios
    - Explore Gantt chart for optimization, cost and resource charts, and key statistical data.
    - Set constraints and optimize the results to save the scenario
- Lesson 9: Application Portfolio Management
    - Access application portfolio management area
    - Explain application portfolio management features
    - Create and edit an application record
    - Learn about application attributes – contents, roadmaps, and data analysis
    - Create and edit portfolio record
    - Learn about portfolio attributes – contents, roadmaps, and data analysis
    - Create an optimization record
    - Learn about optimization attributes – surveys, data collection, optimization type, optimization process, and optimization report
    - Review the optimization record details using the survey results received from the application owners
    - Understand the relationship of proposals with optimization record.

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Wymagania:

To be successful in this course, you should have the following prerequisites or knowledge:

- Familiarity with different roles in an IT service management environment
- Familiarity with different flavors of the user interfaces provided by SMAX
- Familiarity with different versions of the SMAX available.

Poziom trudności

Certyfikaty:

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

Prowadzący:

Authorized Micro Focus Trainer

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