PD370 - Using and Configuring Process Designer

TRAINING GOALS:

Participants in this training learn the skills required to build and modify existing workflows to support business processes, use rule sets and rule types to define business rules, use the Task Planner to design and schedule planned tasks, and describe authorization roles and security areas. This course covers Process Designer for Service Manager version 9.40 Codeless mode, in which Process Designer workflows and functionality are fully implemented for the following modules: Knowledge Management, Service Desk, Incident Management, Problem Management, Change Management, Request Fulfillment, and Service Level Management.

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

- Describe Service Manager Process Designer (Process Designer) and the modules in Service Manager 9.40 Legacy and Codeless mode that use Process Designer
- Use the following Process Designer components:
    - Workflow Designer o Business Rules Editor
    - Security Model
    - Task Planner
    - Work with the Help Desk (Service Desk, Incident Management, Problem Management), Change Management, Knowledge Management, and Request Fulfillment workflows

Audience/Job Roles

System Administrators and other personnel responsible for the implementation of Service Manager.

CONSPECT:

- Class Logistics
    - Describe the course objectives
    - Describe the class logistics
- Overview of the Process Designer
    - Describe Process Designer application
    - Describe the benefits of the Process Designer application
    - Describe which Service Manager (SM) modules use Process Designer
    - Navigate the Process Designer menus

- Describe the two different SM 9.4 modes (Classic and Codeless) and what Process Designer modules and components are included with each module

- Components of the Process Designer – Workflow Designer
  - Describe the Process Designer workflows
  - Create new workflows
  - Edit workflows
  - Call workflows from each Process Designer module
  - Export a workflow (and its related records)
  - Describe the tables for which Process Designer workflows are enabled

- Components of the Process Designer – Business Rule Editor
  - Define business rules
  - Describe the different types of rules in SM
  - Describe rule sets and how they work with workflows
  - Use the Condition Editor
  - Describe how format control works with rules sets

- Components of the Process Designer – Security Model
  - Describe the Process Designer Security Model
  - Describe security areas and security roles
  - Assign security roles to operators
  - Add new default settings for a security area
  - Describe the variables that you can use in the Condition Editor to test for security rights

- Components of the Process Designer – Task Planner
  - Describe the functionality of the Task Planner
  - List the modules where Task Planner is available
  - Describe a Change Model and Request Model
  - Add tasks using the Task Planner
  - Describe dependencies between tasks
  - Use input and output values
  - Explain the Additional Properties that can be added
  - List the pre-defined Task fields that can be added to the Task Planner

- Service Desk Interaction Workflow
  - Summarize the Service Desk interaction workflow
  - Show how status drives the record through its phases
  - Explain how the status list is set
  - Describe the new Category structure
  - Explain interaction escalation and interoperability with other modules

- Configure Service Desk settings and the environment records

- Incident Management Workflow
  - Describe the Incident workflow
  - Show how status drives the record through the phases
  - Explain how you set the status list
  - Describe the new Category structure
  - Summarize the Incident Task workflow
  - Explain how incident tasks work with incidents
  - Configure incident settings and the environment records

- Problem Management Workflow
  - Describe the Problem and Known Error workflows
  - Explain where known errors are stored
  - Show how status drives the record through its phases
  - Explain how the status list is set
  - Describe the new Category structure
  - Describe the Problem Task workflow
  - Explain how problem tasks work with problems
  - Configure the problem settings and the environment records

- Working with Changes and Tasks
  - Describe the change workflows: Normal, Emergency, Standard, and Change Proposal
  - Describe change categories and models
  - Describe the generic task workflow
  - List task categories
  - Work with the Task Planner to create new tasks
  - Configure the change and change task environment and settings records

- Working with Knowledge Documents
  - Describe the Knowledge Document workflow
  - Determine where to set the Knowledge workflow for the system
  - Describe knowledge profile records for security settings

- Request Fulfillment Workflow
  - Describe the Request and Request Task workflows
  - Explain the purpose of a Request Model
  - Describe how Request Categories and Request Models work together
  - Use the Task Planner to create new tasks
  - Configure the Request Environment and Settings records

  *Indicates Simulation

REQUIREMENTS:

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

- Have familiarity with Service Manager processes and workflows
- Have familiarity with Service Manager configuration tools

Difficulty level

CERTIFICATE:

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

TRAINER:

Authorized Micro Focus Trainer.