Training: Micro Focus

SMAX310 - SMAX administration for Tenant Administrators

TRAINING GOALS:

This course covers how a tenant administrator will use Service Management Automation X (SMAX) to perform a variety of management tasks that range from data management, people management, to designing the applications and its workflows. 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 tenant administrator who wants to perform all administrative tasks in service management for setting up a new process-based book order application from creating custom record types with forms, fields, business rules, processes, notifications, and workflows to defining custom actions and predefined lists. You also want to design and administer the look and feel of the service portal and are interested in customizing the default application settings, settings for a smart ticket, and search with automatic routing solution. You also want to manage access to different parts of the application, locations, and provide different groupings of a record for classification. You want to manage configuration data across tenants and view sample data. From creating, importing, managing, designing, administering, customizing, and analyzing these administrative operations, you will learn how SMAX helps in this and future situations. You have not used SMAX before.

This course is applicable for SMAX 2018.02, 2018.05, 2018.08, 2018.11, 2019.02, 2019.05, and 2019.08 versions. However, the hands-on lab exercises in this course use SMAX 2019.02.

This bundle course involves below ILT and DL courses:

- SMAX310 – SMAX administration for Tenant Administrators
- SMAX310SP - Service Management Automation X: Tenant Administrators (Digital Learning)

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

- Describe studio features
- Create a custom field and add it to the record type
- Add a Calculated field
- Custom field onto required forms
- Create a phase and transition rules
- Create Business rules
- Create Notifications and brand it
- Build an Approval Definition

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- Import and Export Data
- Import translations
- Configure Custom Action and manage Service Level Targets
- Create a custom Application and Record Type
- Create a List
- Create a Custom Theme and describe Basic Settings
- Design Category Tiles
- Configure additional display settings
- Manage Portal Feature settings
- Customize Application settings
- Create a Smart Ticket task
- Customize Smart Search Settings
- Create a Routing Definition
- Edit a User record
- Create a contact record
- Create a New User Group
- Create a Role and update Permissions
- Manage Locations
- Create a Category and Sub Category

Audience/Job Roles:

This course is intended for Tenant Administrators.

CONSPECT:

- Course Overview
  - Introduce the course overview, agenda, and logistics
  - List the available SMAX courses
  - Launch the Digital Learning course
  - Access the lab environment
- Records Management – Studio Capability
  - Explain the administrative operations
  - Navigate to the studio area
  - Explore the different studio features
  - Explain different types of fields and form
  - Configure fields and forms

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    - Manage processes and business rules of a particular record type
    - Explain about email notifications
    - Brand the notifications as required
- Additional Studio Capabilities
    - Understand about governance approvals
    - Build an approval definition
    - Manage to import data of different record types
    - Manage to export data from different record types
    - Understand about localization
    - Export a record type data, translate the required values into a language of your choice
    - Import the translations
    - Configure custom actions
    - Manage Service Level target settings
    - Create custom applications and record type
    - Explain the different types of list.
    - Create a list
- Service Portal Administration
    - Access the service portal settings area.
    - Understand how to configure service portal theme settings
    - Explain about category tiles
    - Customize the service portal
    - Understand about service portal feature settings
- Applications settings, smart analytics settings customization, and routing definitions
    - Navigate the application settings area
    - Explain the different default application settings available
    - Navigate the Smart Analytics settings area
    - Customize smart ticket and smart search
    - Understand about routing definitions
- User Management
    - Access the People area
    - Administer people records
    - Understand the difference between users and contacts
    - Explain the different types of groups
    - Manage user groups
    - Explore the different roles and permission settings available
    - Configure roles and permissions

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- Understand the relationship between people and roles
- Manage locations
- Organize categories and sub-categories
- Data Security Management
  - Manage entitlement rules
  - Explain the encryption domains
- Package Management
  - Access the package manager for configuration data synchronization
  - Export configuration data
  - Simulate an import
  - View and analyze imported sample data
  - Explain how to debug issues

REQUIREMENTS:

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

Difficulty level

CERTIFICATE:

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

TRAINER:

Authorized Micro Focus Trainer.

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