opentext™   **Fast Lane**

SMAX Application Workflows Design (SMAX-AWD)

ID SMAX-AWD   **Price** 1,600.— €(excl. tax)   **Duration** 2 days

Important notes for the booking of Open Text trainings

Please note that prepayment is required for participation in an Open Text training course. Participation in a training course is possible for 12 months after booking the course. Cancellations are excluded. For further information, please refer to **our** General Terms and Conditions.

Course Overview

This two-day course about OpenTextTM Service Management Automation X (SMAX) application workflows design teaches how to manage the application workflows through Studio. The Studio enables a business administrator with a tenant admin role to manage workflows for various record types. This includes defining and editing a record type's fields, forms, business rules, processes, and notifications, as well as importing data, defining validation for approvals, defining custom actions for the record type, and creating custom record types. The course uses lectures and a series of hands-on labs to teach the course material.

Highlights:

- Overview of SMAX application workflows design capabilities using Studio
- Add custom fields, modify forms, and create or edit lists in Studio
- Work with workflows and add phases and transitions to manage the lifecycleof a record type
- Add business rules at various levels to run business logic for the record types
- Use Expression Language functions and expressions to define the businessrule syntax

Who should attend

Tenant administrators and suite administrators

Prerequisites

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

- Basic knowledge of the IT Service Management (ITSM) processes
- Knowledge of the Out-of-the-box (OOTB) SMAX Processes – Request, Incident, Problem, Change, and Release Management
- Basic knowledge of Information Technology Infrastructure Library (ITIL) concepts

Course Objectives

On completion of this course, participants should be able to:

- Define and edit a record type’s fields that are derived from the metadata for the record type.
- Edit the out-of-the-box forms defined for each record type.
- Define and edit a record type workflow and run business logic for those records using business rules defined by Expression Language syntax.
- Create and edit notification templates that are pre-formatted email messages.
- Configure notifications to be sent to the relevant recipients at specific points in a record’s workflow through business rules.
- Configure approvals in the approval definition tab for those record types where approvals must be granted at a certain stage in their workflow.
- Import record data for the selected record type in CSV format.
- Import localized data files for the category, service definition, and offering record types.
- Configure custom actions for the selected record type.
- Control the notifications sent for Service Level Target breaches for incidents and requests.
- Describe how to enable global search.
- Manage strong identity validation for the approval task process.
- Create a new application and record type and set the behaviors through the different studio features.

Course Content

Module 1: Course Overview

- Identify the contents and objectives of the course
- Define the class schedule and class logistics
- Identify the related courses
- Discuss the lab environment details

Module 2: SMAX Studio – Main Building Blocks

Module 2a: Configuring Fields and Forms

- Describe the features of codeless configuration
- Explain how Studio capability enables a tenant admin to manage workflows for record types
- Explain in detail the two main building blocks: Fields and Forms
- Describe how to use Studio codeless configuration to:
- Add custom fields
- Modify forms
- Create or edit Lists

Module 2b: Configuring Processes and Rules

- Describe process workflows
- Add a new phase and transition
- Explain business rules
- Add a rule to a phase or transition
- Use the Expression Language
- Debug expressions
- Discuss advanced Expression Language

Module 3a: SMAX Studio – Additional Features Part 1

- Work with Notifications
- Describe how to build an approval definition
- Explain how to import record data
- Explain how to import localized data files (translated records)

Module 3b: SMAX Studio – Additional Features Part 2

- Configure custom actions
- Describe how to control Service Level Target settings
- Describe how to enable global search
- Explain how to set strong identity validation for approvals in the Authorization tab

Module 4: SMAX Studio – Building Custom Applications

- Create a Studio application: Basics
- Describe the custom application design considerations
- Explain the custom application design process
- Create a new table and add entries to the menu structure

- Add fields to the record type
- Define forms and configure workflow and business rules
- Configure notifications
- Add an approval
- Define custom actions
- Activate Service Level Management
- Discuss additional features available for custom applications

About Fast Lane

Fast Lane is a global, award-winning specialist in technology and business training as well as consulting services for digital transformation. As the only global partner of the three cloud hyperscalers- Microsoft, AWS and Google- and partner of 30 other leading IT vendors, Fast Lane offers qualification solutions and professional services that can be scaled as needed. More than 4,000 experienced Fast Lane professionals train and advise customers in organizations of all sizes in 90 countries worldwide in the areas of cloud, artificial intelligence, cyber security, software development, wireless and mobility, modern workplace, as well as management and leadership skills, IT and project management.

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