

Service Management Automation X (SMAX) Essentials for Tenant Administrators (SMAX310-2021)

ID SMAX310-2021 Price 4,000.— €(excl. tax) Duration 5 days

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Course Overview

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, and 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 an automatic routing solution. You also want to manage access to different parts of the application, and 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 2021.02, 2021.05, and 2021.11 versions. The slides and student guides are of the 2019.05 version but are still compatible with the 2021 lab, and the lab guide is for

the 2021.11 version of SMAX.

Who should attend

This course is intended for Tenant Administrators.

Prerequisites

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

Course Objectives

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
- 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 the 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

Course Content

- Lesson 1: Course Overview
- Lesson 2: Records Management – Studio Capability
- Lesson 3: Additional Studio Capabilities
- Lesson 4: Service Portal Administration
- Lesson 5: Applications settings, smart analytics settings customization, and routing definitions
- Lesson 6: User Management
- Lesson 7: Data Security Management
- Lesson 8: Package Management

Detailed Course Outline

Lesson 1: Course Overview

- Introduce the course overview, agenda, and logistics
- List the available SMAX courses
- Launch the Digital Learning course
- Access the lab environment

Lesson 2: 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
- Manage processes and business rules of a particular record type
- Explain email notifications
- Brand the notifications as required

Lesson 3: Additional Studio Capabilities

- Understand 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

Lesson 4: Service Portal Administration

- Access the service portal settings area.
- Understand how to configure service portal theme settings
- Explain category tiles
- Customize the service portal
- Understand service portal feature settings

Lesson 5: 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 routing definitions

Lesson 6: 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
- Understand the relationship between people and roles
- Manage locations
- Organize categories and sub-categories

Lesson 7: Data Security Management

- Manage entitlement rules
- Explain the encryption domains

Lesson 8: 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

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