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Fast Lane

SMAX Planning and Building (SMPB)

ID SMPB   **Price** 4,000.— €(excl. tax)   **Duration** 5 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 five-day course provides the knowledge needed to design catalog offerings, define service level targets, manage assets and business services using Native SACM (Service Asset and Configuration Management) solutions, create service models, develop knowledge materials for easier use of offerings, and address issues effectively.

In this course, you will also learn to create surveys for feedback, schedule on-call support, provide ideas, and develop proposals for project, program, and application portfolio implementation.

The training comprises theory and practical sessions.

Highlights:

- Service Catalog Management
- Service Level Management
- Service Asset and Configuration Management – Native SACM
- Knowledge Management – IT News, Questions, and Answers
- Survey and On-Call Schedule Management
- Idea and Proposal Management
- Project and Program Management
- Application Portfolio Management

Who should attend

Tenant Administrators, Service Owners, IT Agents, and Process Owners or Managers.

Prerequisites

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

- Basic knowledge of the Information Technology Service Management (ITSM) processes.
- Knowledge of the SMAX platform, which includes understanding its architecture, modules, and functionalities related to integration.
- Knowledge and practical experience with the Out-of-the-Box (OOTB) processes, including Request, Incident, Change, and Problem Management. Additionally, familiarity with SMAX User Interface (UI) terminologies such as forms, fields, records, workflows, and dashboards are essential for successfully navigating and applying the administrative concepts covered in this course.

Course Objectives

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

- Define the service catalog that contains services arranged by category.
- Describe how Service Management uses work schedule time periods in Service Level Management (SLM) calculations.
- Define Service Level Targets for each business service so that the Service Level Management enables you to prioritize requests, incidents, changes, tasks, problems, and custom records.
- Describe how Service Asset and Configuration Management (SACM) helps to organize and track the individual assets that support your business services.
- Use the Native SACM solution for the implementation of SACM in Service Management.
- Create knowledge articles that help to solve problems, post news articles on the Service Portal, and moderate questions and answers.
- Create surveys, send them to end users, and consume the data collected by the surveys.
- Define work schedules and shifts for the groups and individuals who deal with tickets through the On-Call Schedule Management feature.
- Provide ideas and derive proposals for a project, program,

and application portfolio implementation

Course Content

- Course Overview
- Service Catalog Management
- Service Level Management
- Service Asset and Configuration Management – Native SACM
- Knowledge Management – Article
- Knowledge Management – IT News, Hot Topic Analytics, and Q&A
- Survey and On-Call Schedule Management
- Idea and Proposal Management
- Project and Program Management
- Application Portfolio Management

Detailed Course Outline

Chapter 1: Course Overview

- Explain the daily classroom schedule and structure.
- Review the overall course objectives.

Chapter 2: Service Catalog Management

- Describe Service Catalog Management features.
- Describe the Service Catalog structure/hierarchy.
- Discuss the Service Catalog usage.
- Build the Service Catalog.
    - Design a category.
    - Add service definition to the category.
    - Offer user interface elements.
- Define support offering, service offering, and HR support offering.
- Explain general offering details:
    - Agreements
    - Submission via email
    - Audience
    - Public audience
- Define and set up user options.
- Explain the Task plan.
- Explain the Approval plan.
- Publish and use a Fulfillment plan.
- Explain offering bundles.
- Explain offering business rules.
- Localize the Service Catalog data.
- Explain catalog pricing.

Chapter 3: Service Level Management

- Provide an overview of Service Level Management.

- Explain the Service Level Management Information Technology Infrastructure Library (ITIL) process.
- Discuss the Service Level Management key requirements.
- Explain the Service Level Management process.
- Discuss the SMAX Service Level Management goals.
- Explain Operational Level Agreements (OLA) and Underpinning Contracts (UC).
- Describe the Service Level Management components.
- Explain the different Service Level Management elements.
- Define the Service Level Management roles.
- Describe the standard Service Level Management procedures.
- Create and configure a Service Level Target (SLT) set.
- Manage the Service Level Target definitions.
- Develop and manage Service Level Agreements (SLAs) and Operational Level Agreements (OLAs).
- Create and manage Support Agreements, Service Agreements, Human Resource Agreements, and Operational Level Agreements.
- Manage Service Level Target event business rules.
- Describe the Automatic SLT notification settings.
- Explain the Service Level Target duration calculation.
- Track and monitor the Service Level Target status and history.
- Review SLM performance using reports.

Chapter 4: Service Asset and Configuration Management – Native SACM

- Explain the SACM model hierarchy.
- Explain the SACM model relationships.
- Describe the Native SACM solution value.
- Explain the Native SACM architecture.
- Describe the SACM solution alternatives.
- Review the features of Native SACM.
    - Explain federated attributes.
    - Discuss Audit history for federated attributes.
    - Filter, sort, and group based on federated data.
    - Report based on federated attributes.
    - Explain CI detection and global search based on federated attributes.
    - Explain the CI topology widget.
    - Describe impact analysis.
    - Configurability of federated attributes and CI relationships.
- Explain the Native SACM implications.
- Describe the Subtype > CI type mapping.
- Explain the CI deletion and aging.
- Explain the CI lifecycle in Native SACM.
- Describe CI migration.
- Explain Service Modeling in Native SACM.
- Describe the Native SACM deployment architecture.
- Explain the multi-tenant and data domain rules correlation between Service Management and Universal Configuration

Management Database (UCMDB).
- Explain in detail the Configuration Management System (CMS) gateway component.
- Describe the deployment tasks to establish integration between Service Management and UCMDB.
  - Enable CMS gateway on the UCMDB Server.
  - Install CMS gateway.
  - Enable Native SACM in Service Management.
  - Configure SACM in Service Management.
- Explain data migration and its limitations.
- Describe the various ways in which UCMDB data import can be done for Native SACM.
- Explain the few common issues and how to troubleshoot them.

Chapter 5: Knowledge Management – Article

- Explain the Knowledge Management roles.
- Explain Knowledge Management architecture.
- Explain knowledge articles.
- Describe proactive suggested solutions and module integration.
- Explore the global search of articles.
- Create an article model.
- Explain article management – Workflow phases, the audience for article content visibility, the 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.
- Import knowledge articles.

Chapter 6: Knowledge Management – IT News, Hot Topic Analytics, and Q&A

- Explain different knowledge components – IT news, Q&A, and hot topic analytics.
- Define and publish IT news (Hot news).
- Explain ask and help friends.
- Manage and moderate questions and answers from users.
- Explore the hot topic area and refine the results of the hot topic map.
- Analyze hot topic algorithm and 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.

Chapter 7: Survey and On-Call Schedule Management

- Describe survey functionality.
- Design a new survey.
- Analyze the different question/answer types.

- Prepare a survey for execution.
- Explain survey reports.
- Describe different ways to conduct a survey – sending a survey manually or sending a survey automatically using a business rule.
- Explain how big data analytics allows you to analyze survey results.
- Describe and configure on-call schedules.
- Set up agent schedules and vacations for a functional group with group members.
- Explain on-call rotation.
- Manage on-call assignments and strategies.
- Set up an assignment strategy for a functional group.

Chapter 8: Idea and Proposal Management

- Access the idea and proposal management area.
- Explain hot ideas in the self-service portal and agent interface.
- Create a new idea.
- Describe business objectives and resource types.
- Explain proposal management.
- Create a new proposal.
- Explore the budget, financial planning, and resources for the proposal.
- Use proposal analytics to analyze proposal data.

Chapter 9: Project and Program Management

- Access project and program management area.
- Explore the overall status of the projects, programs, and portfolios.
- Navigate and describe the executive summary dashboard.
- Explain project management.
- Create, plan, and execute a project.
- Describe the resource demand, timeline, financial planning, risks, and issues required to run a project.
- Explain program management.
- Initiate, plan, and execute a program.
- Describe the resource demand, timeline, financial planning, risks, and issues required to run a program.
- Explain project portfolio management.
- Create and edit a project portfolio.
- Describe the project optimization scenarios.
- Explore the Gantt chart for optimization, cost and resource charts, and key statistical data.
- Set constraints and optimize the results to save the scenario.

Chapter 10: Application Portfolio Management

- Access the application portfolio management area.
- Explain application portfolio management features.
- Create and edit an application record.

- Describe the application attributes – contents, roadmaps, and data analysis.
- Create and edit portfolio records.
- Describe the portfolio attributes – contents, roadmaps, and data analysis.
- Create an optimization record.
- Explain the 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.
- Explain the relationship of proposals with optimization records.

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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✓ Blended & Hybrid Learning
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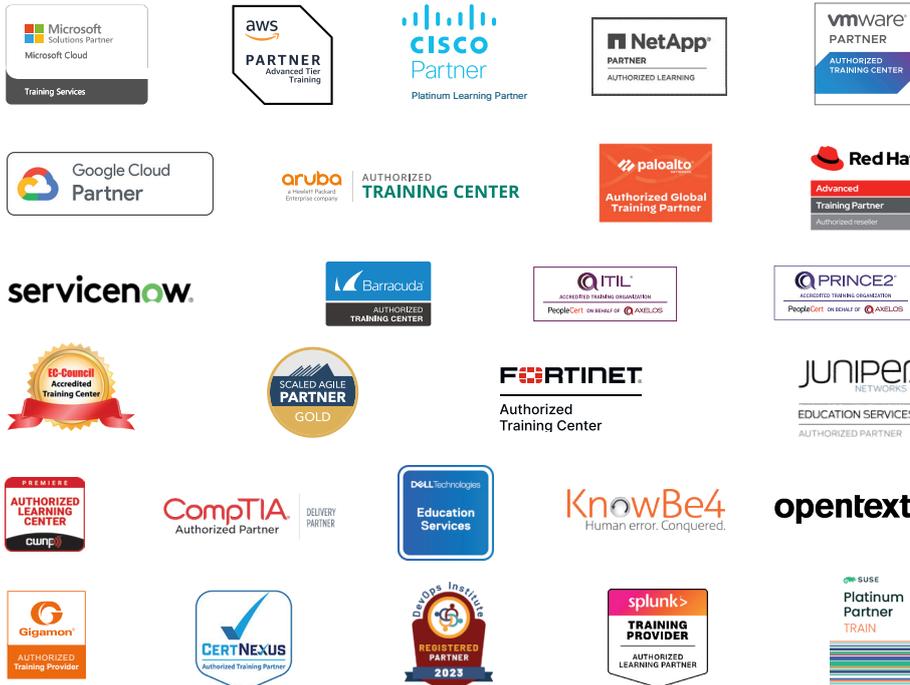
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