



Service Anywhere 3.6

Adoption Readiness Tool (ART)

The Adoption Readiness Tool (ART) provides initial and ongoing enablement to your users to ensure that you get the most out of your software. ART is a cost-effective, comprehensive IT education, documentation and performance support solution. ART provides pre-built simulation-based courses in Micro Focus software that can be accessed by users anytime, anywhere.

ART content provides easy access to self-paced learning content enabling your users to not only dive into an online course, but also to gain direct access to individual components to quickly master specific tasks.

- Access printable job aids targeted towards specific application tasks.
- View or practice a task in a simulated environment.
- Experience full learning with key terms and concepts, product demonstrations and selfassessments by viewing the entire course.

Regardless of which route chosen, users will gain an understanding of the important key concepts, as well as gain competency in both the navigation and functionality of the application.

Course Description

Participants in this training learn how to use Service Anywhere and its components. The modules included in this course are: Employee Self-Service, Service Asset and Configuration Management, Service Request Management, Knowledge Management, Service Level Management, Incident Management, Problem Management, Change Management, Software Asset Management, Release Management, Survey Management, Idea and Proposal Management, Reporting, Application Portfolio Management, and Project and Program Management.

Audience/Job Roles

All users of Service Anywhere

Course Objectives

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

- Navigate and explore the Service Anywhere interface
- Fulfill your requests and troubleshoot issues using the Employee Self-Service Portal
- Manage records within each of the Service Anywhere modules, as pertains to your user role

Prerequisites / Recommended Skills

N/A

Course Topics

| Modules | Objectives |
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| Module 1: Service Anywhere Introduction | <ul style="list-style-type: none"> • Introduction • Objectives • Service Anywhere Key Features • HAVEn • Social Insight • Social Collaboration • Live Support • Hot Topics Analytics • Connected Intelligence • Natural Searches • Service Anywhere Modules • The Service Desk • The Service Catalog • Service Request Management • Enhanced Employee Self-Service • Agent Interface • Service Asset and Configuration Management • Summary |
| Module 2: Service Anywhere Interface and Navigation | <ul style="list-style-type: none"> • Introduction • Objectives • The Customer Portal • Access Service Anywhere* • User Profile • Update Your Profile* • Dashboards, Tasks, and Approvals • Main Toolbar • Navigate the User Interface - Tablet • Navigate the User Interface* • Common Buttons: Records • Common Buttons: Lists • Global Search • Perform a Global Search* • Views • Filter Lists and Manage Views* |

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| | <ul style="list-style-type: none"> • Email Records* • Perform a Mass Update* • Reports • Create a Report* • Dashboards • Manage Dashboards* • Online Help • Search Online Help* • Importing Data • Import Data – Use Case Samples • Import Data* • Field Level Encryption • View Encrypted Data* • In-Line Translations • Access In-Line Translations* • Summary |
| <p>Module 3: Employee Self-Service</p> | <ul style="list-style-type: none"> • Introduction • Objectives • Employee Self-Service Portal • Search Results and Suggestions • Self-Service Portal Loading Page • Self-Service Portal Tour • Requests, Approvals, and Preference Menu • Navigate the Self-Service Portal* • Skill Set • Update Your User Profile and Set Your Skills* • The Service Catalog • The Shopping Cart • Order from the Catalog* • Request a Catalog Item on Behalf of Another User* • Use the Shopping Cart to Order Multiple Items* • Submit a Support Request Offline* • Use Knowledge and Social Forums to Solve Issues* • Public/Social Tickets • Guided Support and Chat • Subscribe to a Public Ticket* • Submit a Support Request and Chat with an Agent* • Abandon a Request* • Collaborate to Solve Issues – Ask friends • Collaborate to Solve Issues – Help friends • Ask and Answer Questions* • Ideas • Submit and Add Feedback to an Idea* • To Do Items • Accept or Reject Solutions • Accept a Solution* • Reject a Solution* • Confirm the Completion of a Service Request* |

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| | <ul style="list-style-type: none"> • Approval Delegation • Delegate Approvals* • Approve a Request* • Summary |
| <p>Module 4: Service Asset and Configuration Management</p> | <ul style="list-style-type: none"> • Introduction • Objectives • Key Features of SACM • Navigate the SACM Interface* • SACM Modeling – Service Definition • SACM Modeling – Actual Service • SACM Modeling – Service Component • SACM Modeling – System Element • SACM Modeling – Device • SACM Modeling – Example • Device Workflow • System Element Workflow • Service Component/Actual Services Workflow • Create an Asset Record* • Impact Analysis • Impact Map • View Impact Analysis from a Request* • Stock Management • Receiving Assets • Manage Stockrooms* • Receive Assets Manually* • Reservations • Reservation Workflow • Reserve Assets Manually* • Asset Models • Asset Models Workflow • Create and Manage Asset Models* • Infrastructure and Peripheral Assets • Infrastructure and Peripheral Assets Workflow • Subscriptions • Subscription Workflow • Create a Subscription Manually* • Summary |

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| Module 5: Vendor, Contract, and Financial Management | <ul style="list-style-type: none"> • Introduction • Objectives • Vendor Management • Brands • Add a Vendor* • Contract Management • Contract Workflow • Navigate Contracts* • View Contract Information for an Asset Related to a Ticket* • Add a Maintenance Contract* • Fixed Assets • Fixed Assets Workflow • Cost Centers • Cost Types • Budget Types • Net Value Simulation • Summary |
| Module 6: Service Request Management | <ul style="list-style-type: none"> • Introduction • Objectives • The Service Request Workflow • The Support Request Workflow • The Cart Workflow • Logging and Classifying a Request • Classify a Request* • Abandon a Request* • Approval Plan • Approve a Request* • Task Plan • Complete a Task* • Request Fulfillment • Solve a Request Using Knowledge Management* • Escalate a Request* • Escalate a Request to an Incident* • Start a Discussion to Solve an Issue* • Mark the Request as Fulfilled* • Subscriptions • Request Validation • Live Support • Update the Status of a Request Using Live Support* • Use the Live Support Interface to Assist Customers* • Request a Service Offering Using Live Support* • Link a Request to an Incident Using Live Support* • Agent Chat Queue • Answer a Chat Request* • Multi-Tenant Console • Navigate the Multi-Tenant Console* • Summary |

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| Module 7: Knowledge Management | <ul style="list-style-type: none"> • Introduction • Objectives • Key Features • Architecture - Search • Architecture - Indexing • Knowledge and News Article Features • IT News • Global Search • Search Knowledge Articles* • Module Integration • Knowledge Management/IT News Workflow • Knowledge Article Record • Create a Knowledge Article* • Review, Modify and Preview a Knowledge Article* • Publish a Knowledge Article* • Archive a Knowledge Article* • Publish News from a Change* • Article and News Models • Create an Article Model* • Q&A Moderation—Unanswered Questions • Q&A Moderation—Questions with Problems • Mark a Question as a Problem* • Moderate Questions and Answers* • In-Line Translations • Hot Topic Analytics • Analyze Self-Service Portal Knowledge Searches* • Create a Support Offering from a Hot Topic Use Question* • Create a Knowledge Article from a Hot Topic Support Request* • Summary |
| Module 8: Service Level and Time Period Management | <ul style="list-style-type: none"> • Introduction • Objectives • Time Period Management • Time Period Management Rules • Create a Work Schedule* • Service Level Targets • Service Level Target Set • Service Level Agreement • Service Level Agreement Workflow • Operational Level Agreement • Process for Implementing Service Level Targets • Create a Service Level Target Set* • Create a Service Level Agreement* • View Incident Service Level Targets* • Summary |

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| Module 9: Incident Management | <ul style="list-style-type: none"> • Introduction • Objectives • Key Benefits of Incident Management • Incident Management Workflow • Incident Management Landing Page • Navigating the Incident Management Interface* • Open an Incident* • Incident Templates • Create an Incident Template* • Apply a Template to an Incident* • Incident Models • Apply a Model to an Incident* • Escalating a Request to an Incident • Escalate a Request to an Incident* • Escalating Incidents • Escalate an Incident* • First Touch Solution • Open and Resolve an Incident Immediately* • Solution Matching • Resolve and Close an Incident* • Open Related Records* • Summary |
| Module 10: Problem Management | <ul style="list-style-type: none"> • Introduction • Objectives • Key Functions of Problem Management • Problem Management Workflow • Navigate the Problem Management Interface* • Create a Problem from an Incident* • Create a Problem Template* • Classify a Problem* • Investigating and Resolving Problems • Investigate and Resolve a Problem* • Review and Close a Problem* • Abandon a Problem* • Summary |

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| Module 11: Change Management | <ul style="list-style-type: none"> • Introduction • Objectives • Key Functions of Change Management • Standard Change Management Workflow • Normal Change Management Workflow • Emergency Change Management Workflow • Change Models • Navigate the Change Management Interface* • Open and Evaluate a Change* • Change Templates • Create a Change Template* • Planning a Change • Plan a Change* • Approve a Change* • Deploying a Change • Deploy a Change* • Complete a Change Task* • Validating a Change • Validate and Close a Change* • Abandon a Change* • Change Calendar • Time Period Management • Navigate the Change Calendar* • Schedule a Change using the Change Calendar* • Change Impact and Visualization • Reschedule a Change and View the Impact* • Change Analytics • Change Analytics Dashboard • Navigate the Change Analytics Dashboard* • Summary |
| Module 12: Software Asset Management | <ul style="list-style-type: none"> • Introduction • Objectives • License Types • License Models • Create a License Model* • The License Workflow • Create a License* • Software Titles • Summary |

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| <p>Module 13: Release Management</p> | <ul style="list-style-type: none"> • Introduction • Objectives • Release Workflow • Release Models • Create a Release Model* • Create a Release* • Managing Changes within a Release • View Release in Calendar* • Schedule and Manage a Change within a Release* • Release Reporting • Create a Release Report* • Summary |
| <p>Module 14: Survey Management</p> | <ul style="list-style-type: none"> • Introduction • Objectives • Survey Management Workflow • Survey Details • Adding Survey Questions • Survey Questions • Review a Survey* • Create a Survey* • Previewing a Survey • Hot Topic Analytics for Surveys • Summary |
| <p>Module 15: Idea and Proposal Management</p> | <ul style="list-style-type: none"> • Introduction • Objectives • Idea Workflow • Proposal Workflow • Resource Types • Business Objectives • Review the Idea and Proposal Management Interface* • Create a New Idea* • Create a New Business Objective* • Create a New Proposal* • Proposal Analytics • Review Proposal Analytics* • Summary |

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| Module 16: Reporting | <ul style="list-style-type: none"> • Introduction • Objectives • Report Types • Report Permissions • Reports User Interface • Reports List Pane • Reports Center Pane • Report Properties • Report Quota Management • Navigate the Reports User Interface* • Create a Report* • Create a Report with Groupings and Functions* • Create a Survey Analytic Report* • Activate and Deactivate a Report* • Manage Dashboards* • Reports Troubleshooting and Limitations • Quota Troubleshooting • Summary |
| Module 17: Application Portfolio Management | <ul style="list-style-type: none"> • Introduction • Objectives • Application Portfolio Management Components • Application Portfolio Management - Applications • Application Workflow • Application Roadmap • Create an Application Record* • Edit an Application Record* • Application Portfolio Management - Portfolios • Portfolios - General Tab • Portfolios - Contents Tab • Portfolios - Roadmaps Tab • Portfolios - Analysis Tab • Create a Portfolio* • Edit a Portfolio* • Application Portfolio Management - Optimization Type • Optimization Types - General Tab • Optimization Types - Configuration Tab • Optimization Types - Sample Report Tab • Application Portfolio Management – Optimizations • Surveys • Sample Survey • Create an Optimization Record* • Review Optimization Record Details* • Create a Proposal from an Optimization Record* • Reporting and Scoring • Application Portfolio Management Roles • Summary |

Module 18: Project and Program Management

- Introduction
- Objectives
- Project and Program Management Roles
- Executive Summary Dashboard
- Navigate the Executive Summary Dashboard*
- Projects
- Project Workflow
- Create and Edit a Project*
- Programs
- Program Workflow
- Create and Edit a Program*
- Project Portfolios
- Create and Edit a Project Portfolio*
- Summary

* Indicates a simulation.