



Service Manager 9.60

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 self-assessments 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

This introductory course provides students with the skills needed to effectively use the Service Manager 9.60 software product. This course focuses on teaching the processes embedded in Service Manager and the tasks performed by end users. This course covers the following areas: Service Desk, Employee Self-Service, Service Manager Service Portal, Incident Management, Problem Management, Change Management, and Knowledge Management.

Audience/Job Roles

All users of Service Manager.

Course Objectives

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

- Describe the features and benefits of Service Manager
- Navigate the Service Manager interface
- Describe the processes and workflows implemented for Service Desk
- Log in to the Employee Self-Service Portal to search the knowledge articles and manage your requests.
- Log in to the Service Portal to browse the catalogs, complete surveys, and manage your requests or requests that require your attentions (for example, those pending your approval)
- Describe the processes and workflows implemented for Incident Management
- Describe the processes and workflows implemented for Problem Management
- Describe the processes and workflows implemented for Change Management
- Describe the processes and workflows implemented for Knowledge Management
- Describe the processes and workflows implemented for Configuration Management

Prerequisites / Recommended Skills

There are no prerequisites for this course.

Course Topics

Modules	Objectives
Module 1: Introduction	<ul style="list-style-type: none"> ▪ Introduction ▪ Objectives ▪ Service Manager Application Modules ▪ Service Manager Workflow ▪ Service Manager Components ▪ The Service Manager Windows Client ▪ Log in to the Service Manager Windows Client* ▪ The Service Manager Web Client ▪ Log into the Service Manager Web Client* ▪ To Do List ▪ Web Client Preferences ▪ Set Client Preferences* ▪ Parts of the Window Client Interface ▪ Common Toolbar Buttons (Windows Client) ▪ Navigate the Windows User Interface* ▪ Common Toolbar Buttons (Web Client) ▪ Common Record Fields ▪ Navigate the Web User Interface* ▪ Search Form ▪ Search for Records* ▪ Editing Records ▪ Modify Columns* ▪ Export Records* ▪ Create a Favorite* ▪ Perform Mass Update* ▪ Online Help ▪ Summary ▪ Assessment
Module 2: Service Desk	<ul style="list-style-type: none"> ▪ Service Desk ▪ Introduction ▪ Objectives ▪ Service Desk Workflow (Service or Support Request) ▪ Service Desk Workflow (Service Catalogue Request) ▪ Navigate the Interaction Record Part 1 ▪ Navigate the Interaction Record Part 1 ▪ Service Desk Streamlined Interaction ▪ Streamlined Interaction Workflows ▪ Create New Interaction* ▪ Apply Interaction Templates* ▪ What is Service Manager Smart Analytics ▪ Create a Smart Ticket* ▪ Use Smart Search to find a solution* ▪ Use the Knowledgebase to Solve an Interaction* ▪ Search and Update Interaction Records*

	<ul style="list-style-type: none"> ▪ Duplicate Interaction Records* ▪ Escalate an Interaction* ▪ Withdraw an Interaction* ▪ Close an Interaction* ▪ Close escalated Interaction* ▪ Set a Reminder* ▪ Employee Self Service Portal ▪ Additional Self Service Portals ▪ Log an Interaction using ESS* ▪ Summary ▪ Assessment
<p>Module 3: Incident Management</p>	<ul style="list-style-type: none"> ▪ Incident Management ▪ Introduction ▪ Objectives ▪ Incident Management Process ▪ Navigate the Incident Record - Header ▪ Navigate the Incident Record - Detail ▪ Incident Queue ▪ Incident Management Workflow ▪ Incident Management Task Workflow ▪ Incident User Interaction ▪ Open an Incident* ▪ Navigate the Incident Record ▪ Apply Template to Complete an Incident* ▪ Complaint Handling ▪ Incident Assignment ▪ Search for and Assign an Incidents* ▪ Incident Investigation and Diagnosis ▪ Link an Incident to Another Record* ▪ Incident Resolution and Recovery ▪ Find a solution and Create a Task* ▪ Complete an Incident Task* ▪ Resolve an Incident* ▪ Incident Review and Closure ▪ Review and Close an Incident* ▪ Reject a Resolution* ▪ Incident Level Agreements ▪ Incident Escalation ▪ Incident Escalation Process ▪ Hot Topic Analytics ▪ Access Hot Topic Analytics from Incident Reports* ▪ Incident Queue ▪ Summary ▪ Assessment

Module 4: Problem Management	<ul style="list-style-type: none"> ▪ Problem Management ▪ Introduction ▪ Objectives ▪ Problem Management Goals ▪ Problem Management Workflow ▪ Problem Management Task Workflow ▪ Problem Record - New Problem Screen ▪ Problem Record - Edit Problem Screen ▪ Problem Queue ▪ Problem Detection, Logging and Categorization ▪ Problem Detection, Logging and Categorization Screen ▪ Create a Problem from a Problem Candidate* ▪ Create a Problem from an Interaction* ▪ Create a Problem Using Hot Topic Analytics* ▪ Problem Investigation and Diagnosis Process ▪ Problem Investigation and Diagnosis Screen ▪ Plan and Schedule the Problem Resolution* ▪ Create and Assign a Task* ▪ Complete a Problem Task* ▪ Workaround vs. Root Cause ▪ Document the Root Cause* ▪ Known Error ▪ Problem Resolution ▪ Create a New Known Error* ▪ Document the Solution and Resolve the Problem* ▪ Open a Change from a Known Error* ▪ Close a Known Error* ▪ Problem Review and Closure Process ▪ Problem Review and Closure Wizard ▪ Review and Close the Problem* ▪ Defer a Problem* ▪ Summary ▪ Assessment
Module 5: Change Management	<ul style="list-style-type: none"> ▪ Change Management ▪ Introduction ▪ Objectives ▪ Change Management Goals ▪ Change Management Process ▪ Standard Change Workflow ▪ Normal Change Workflow ▪ Emergency Change Workflow ▪ Change Task Workflow ▪ Navigate the Change Record - New Screen ▪ Navigate the Change Record - Edit Screen ▪ Change Model ▪ Change Queue ▪ Change Calendar ▪ Open a Change*

	<ul style="list-style-type: none"> ▪ Validation and Risk Assessment ▪ Change Planning and Scheduling ▪ Plan and Schedule a Change* ▪ Abandon a Change* ▪ Change Approval ▪ Approve a Change* ▪ Build, Test, and Implementation/Deploy Change ▪ Open and Assign Change Tasks* ▪ Change Task Queue ▪ Complete Change Tasks* ▪ Review and Close a Change* ▪ Summary ▪ Assessment
<p>Module 6: Configuration Management</p>	<ul style="list-style-type: none"> ▪ Configuration Management ▪ Introduction ▪ Objectives ▪ Configuration Management Process ▪ CI Classification ▪ CI Groups ▪ Baselines ▪ Product Catalog Items ▪ CI Record - Header ▪ Search CI Records* ▪ Navigate the CI Record* ▪ Create a Product Catalog Item* ▪ Create a New CI* ▪ View the Records Related to a CI* ▪ View the CI Relationship Graph* ▪ Actual and Expected State ▪ View the Managed and Actual State of CI* ▪ Create a CI Group* ▪ Update a CI Group* ▪ Service Life Cycle Management ▪ Summary ▪ Assessment
<p>Module 7: Knowledge Management</p>	<ul style="list-style-type: none"> ▪ Knowledge Management ▪ Introduction ▪ Objectives ▪ KCS Process ▪ KCS Roles ▪ Knowledge Management Process ▪ Knowledge Management Workflow ▪ Document Types ▪ Document States ▪ Smart Search ▪ Providing Feedback ▪ What Happens with Feedback?

	<ul style="list-style-type: none"> ▪ Perform a Knowledge Search and Leave Feedback* ▪ Use Knowledge to Solve an Interaction* ▪ New Knowledge Management Document Form ▪ Contribute Knowledge* ▪ Creating Knowledge from an Incident ▪ Contribute Knowledge from an Incident* ▪ Approve and Publish a Knowledge Document* ▪ Submit a Knowledge Document for Revision* ▪ Submit a Knowledge Document for Review* ▪ Review and Accept a Knowledge Document* ▪ Contributing a Hot News Knowledge Article ▪ Create Hot News* ▪ Retire a Knowledge Document* ▪ Summary <ul style="list-style-type: none"> ▪ Assessment
<p>Module 8: Employee Self Service (ESS)</p>	<ul style="list-style-type: none"> ▪ Employee Self Service ▪ Introduction ▪ Objectives ▪ ESS Process ▪ Login and Navigate the ESS Portal* ▪ Managing your passwords ▪ Perform Smart Search* ▪ Submit a Request* ▪ Smart Request ▪ Submit a Smart Request * ▪ Search Request* ▪ Update a Request* ▪ Close a Request* ▪ Resubmit a Request* ▪ Summary ▪ Assessment

Module 9: Service Portal

- Service Portal
- Introduction
- Objectives
- What is SM Service Portal
- Service Portal Key features
- Navigate Service Portal*
- Service Portal Catalog
- Shopping Cart
- Request On Behalf
- Approve Requests
- Shop for and Order Items*
- Request Support
- Submit Support Request*
- Resubmit Request
- To Do List
- Universal Search options
- Universal Search Features
- General Support
- Smart Ticket
- Surveys
- Complete a Survey *
- Summary
- Assessment

* Indicates a simulation.