Service Management Automation X (SMAX) 2020.08

Adoption Readiness Tool (ART)

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- 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 course provides students with the skills needed to effectively use the Service Management Automation X (SMAX) software product in a role-based manner.

Audience/Job Roles

This course is intended for the following user roles who will configure and use SMAX:

- Service Desk Agents
- Support Engineer
- End User
- Configuration and Asset Managers
- Service or Process Owners
- Tenant Administrators
- Suite Administrators

Course Objectives

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

- Handle, fulfill, and resolve multiple requests from business users as a service desk agent
- Assign work on a high priority incident, where a Marketing Analyst is unable to print an urgent job as a support engineer
- Raise a visa request as an end user for travel
- Fulfill change requests and solve problems as well as manage contracts with the vendors as a configuration and asset managers
- Design new catalog offerings for a newly set up online bookstore, align service and support level agreements and targets, setup knowledge articles, news, models, Q&A, on- call schedules and surveys
- Perform variety of management tasks that range from data management, people management, to how to design your applications and its workflows
- Perform administrative tasks related to service management automation in Suite Administration

Prerequisites / Recommended Skills

The following Courses/Learning Series provides useful information about the different administrative operations performed in order to smoothly run the variety of functionalities of SMAX: Service Desk Agents, Support Engineer, End User, Configuration and Asset Managers, Service or Process Owners, Tenant Administrators, and Suite Administrators.

Course Topics

Modules	Objectives

Module 1: SMAX for Service Desk Agents	▪ Request Management to Fulfill/Resolve End User Requests
	  ▪ Introduction
	  ▪ Objectives
	  ▪ Create and Classify a Service Request
	    ▪ SMAX Environment
	    ▪ Agent Interface
	    ▪ Service Request Roles & Permissions
	    ▪ Live Support Feature
	    ▪ Catalogue offerings
	    ▪ Service Request
	    ▪ Create and Classify a Service Request *
	  ▪ Approve a Request
	    ▪ Approval Capabilities
	    ▪ Approval Strategy
	    ▪ Approve a Request *
	  ▪ Complete Tasks, Mark a Request as fulfilled, and Monitor Targets
	    ▪ Fulfillment Tasks
	    ▪ Service and Operational level Targets for Requests
	    ▪ Complete Tasks, Mark a Request as fulfilled, and Monitor Targets *
	  ▪ Filter Lists, Manage Views, and Access a Support Request for Classification
	    ▪ Request List View
	    ▪ Filters
	    ▪ Views
	    ▪ Support Request details
	    ▪ Filter Lists, Manage Views, and Access a Support Request for Classification *
	  ▪ Answer a Chat and Start a Discussion to resolve requests
	    ▪ Bundle Request
	    ▪ Agent to End User Chat
	    ▪ HR Support Request
	    ▪ Discussion
	    ▪ Answer a Chat and Start a Discussion to resolve requests *
	  ▪ Escalate a Request to an Incident
	    ▪ Escalate a General Support Request
	    ▪ Escalate a Request to an Incident *
	  ▪ Summary
	  ▪ Assessment

	▪ Utilize and Contribute Knowledge for Request Fulfillment
	  ▪ Introduction
	  ▪ Objectives
	  ▪ Solve a Request using Knowledge Management
	    ▪ Proactive Suggested Solutions
	    ▪ Module Integration – Knowledge Integration with Service Request Module
	    ▪ Solve a Request using Knowledge Management *
	  ▪ Create a Knowledge Article from a Request
	    ▪ Knowledge Contribution
	    ▪ Create a Knowledge Article from a Request *
	  ▪ Summary
	  ▪ Assessment

	▪ Create Reports and Manage Dashboard
	  ▪ Introduction
	  ▪ Objectives
	  ▪ Create Reports and Manage Dashboard
	    ▪ Reporting Features
	    ▪ Dashboard Features
	    ▪ Create Reports and Manage Dashboard *
	  ▪ Summary
	  ▪ Assessment
	  ▪ Course Summary

The below modules are in progress…	

Module 2: SMAX for Support Engineers	▪ Incident Management
	  ▪ Introduction
	  ▪ Objectives
	  ▪ The SMAX Environment
	  ▪ Key Concepts of SMAX
	    ▪ My Dashboard
	    ▪ SMAX User Interface
	    ▪ SMAX User Interface – Toolbars and Views
	    ▪ SMAX User Interface – Tabs, Fields, and Editor
	    ▪ Filters and Groups
	    ▪ Views
	    ▪ Managing Views
	    ▪ Discussions
	    ▪ Comments

	▪ Incident Management
	    ▪ Incident Management
	    ▪ Roles and Permissions
	    ▪ The Incident Landing Page
	    ▪ Triggers for Including an Event
	    ▪ Incident Workflow
	▪ Service Level Management for Incidents
	    ▪ Overview of Service Level Management
	    ▪ Service Level Management Elements
	    ▪ Open and Classify an Incident, and Monitor Targets*
	▪ Incident Templates and Models
	    ▪ Incident Templates
	    ▪ Incident Model
	    ▪ Create an Incident Template and Model*
	▪ Incident Resolution
	    ▪ First Touch Solutions
	    ▪ Find More Solutions
	    ▪ Apply a Template and Provide Resolution*
	    ▪ Task Plan
	    ▪ Apply an Incident Model and Complete a Manual Task*
	    ▪ Incident Escalation
	    ▪ Escalate an Incident*
	    ▪ Incident Related Records
	    ▪ Create a Problem from an Incident*
	    ▪ The Assign to me Feature
	    ▪ Use Assign to Me*
	▪ Summary
	▪ Assessment

	▪ Problem Management
	    ▪ Introduction
	    ▪ Objectives
	    ▪ Problem Management
	        ▪ The Problem Management Approach
	        ▪ Roles and Permissions
	        ▪ Problem Workflow
	        ▪ Create and Classify a Problem*
	    ▪ Manual Problem Analysis
	        ▪ Problem Task Plan
	        ▪ Problem Related Records
	        ▪ Duplicate Problem
	        ▪ Investigate and Resolve a Problem*
	    ▪ Problem Templates
	        ▪ Problem Templates
	        ▪ Create a Problem Template*

	▪ Guided Problem Analysis
	    ▪ Hot Topic Analytics
	    ▪ Stop List
	    ▪ Create a Problem from Hot Topic Incidents Trend*
	▪ Summary
	▪ Assessment

	▪ Change Management
	  ▪ Introduction
	  ▪ Objectives
	  ▪ Change Management
	  ▪ Change Management
	  ▪ Roles and Permissions
	    ▪ Change Types
	    ▪ Types of Change
	  ▪ Change Workflow
	    ▪ Standard Change Workflow
	    ▪ Normal Change Workflow
	    ▪ Emergency Change Workflow
	  ▪ Change Templates and Models
	    ▪ Change Templates
	    ▪ Change Model
	  ▪ Task Plans
	    ▪ Change Task Plan
	    ▪ Create a Change Template and Model *
	  ▪ Change Management Procedures
	    ▪ Change Management Procedures
	  ▪ Log and Evaluate a Change
	    ▪ Change Request - Logging
	    ▪ Automatic Recognition of Cis
	    ▪ Change Request - Evaluation
	    ▪ Open and Evaluate a Change *
	  ▪ Plan the Change
	    ▪ Change Request - Planning
	    ▪ Maintenance and Blackout Window
	    ▪ Change Schedule
	    ▪ Plan a Change*
	  ▪ Approve the Change Plan
	    ▪ Approval Definition - Plan
	    ▪ Change Plan Approvals
	    ▪ Approval Strategy
	    ▪ Approval Queue
	    ▪ Approval Process
	    ▪ Approve a Change Plan*
	    ▪ Build and Test the Plan
	  ▪ Build and Test a Plan
	    ▪ Tasks Queue
	    ▪ Design a Task Plan*
	    ▪ Complete a Task Plan*
	    ▪ Move the Change to Approve Deployment*

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Approve Change Deployment
Approval Definition - Deployment
Deploy a Change
Change Implementation
Deploy the Change*
Validate and Close the Change
Change Validation and Closure
Validate and Close a Change *
Summary
Assessment

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Change Calendar and Change Analytics

Introduction
Objectives
Change Calendar
Change Calendar
Change Calendar User Interface
Time Periods
Change Calendar Icons
Schedule a Change Using Change Calendar*
SCAM References
Involved Cis
Impact Visualization
Reschedule a Change and View Impact *
Change Analytics
Change Analytics - Performance Improvement
Benefits of Change Analytics
Use Change Analytics Dashboard to Improve Performance*
Summary
Assessment

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Release Management

Introduction
Objectives
Release Management
Release Management
Roles and Permissions
Release Workflow
Release Models
Release Model
Task Plans
Release Task Plan
Create a Release Model *
Release Management Procedures
Release Management Procedures

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Log and Evaluate a Release

Release - Logging
Release Evaluation
Log and Evaluate a Release*

Plan the Release

Release Planning
Plan a Release*

Build and Test the Release

Build and Test
Tasks Queue
Design a Task Plan*
Complete a Release Plan*
Move the Release to Approve Deployment*

Approve Release Deployment

Approval Definition - Deployment

Deploy a Release

Release Deployment
Deploy the Release *

Validate and Close the Release

Release Validation and Closure
Validate and Close a Release*

Release and Change Calendar

Change Calendar - Release Mode
Schedule and Manage a Change within Release*

Summary
Assessment

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Reports and Dashboards

Introduction
Objectives
Reports

Reports
Report Types
Report User Interface
Reports List Pane
Reports Center Pane
Report Properties

Dashboards

Dashboard
Create a Report and Manage the Dashboard*

Summary
Assessment
Course Summary

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Module 3: SMAX for End Users	▪ Course Introduction
	▪ Your Story
	▪ Requesting support and collaborating with others to solve issues
	    ▪ Environment
	    ▪ Service Portal Loading Page
	    ▪ Service Portal
	    ▪ Catalog Offerings
	    ▪ Walk Through
	    ▪ Submit a Support Request Offline from a Catalog *
	    ▪ Virtual Agent Interface
	    ▪ Self-Service Chat
	    ▪ Walk Through
	    ▪ Submit a Support Request via Virtual Agent and Chat with an IT Agent *
	    ▪ Proactive Suggested Solutions
	    ▪ Social Forum
	    ▪ Walk Through
	    ▪ Use Knowledge and Social Forums to Solve Issues *
	    ▪ Public Requests
	    ▪ Service and Assets
	    ▪ Walk Through
	    ▪ Follow a Public Request and Request Support for Service and Assets *
	    ▪ Ideas
	    ▪ To Do Items
	    ▪ Surveys
	    ▪ Walk Through
	    ▪ Submit and Add a Feedback to an Idea, Accept and Reject a Solution and Take a Survey *
	    ▪ Summary
	▪ Requesting help using Smart Analytics
	    ▪ Smart Analytics
	    ▪ Walk Through
	    ▪ View Suggestions and Create a Smart Ticket by Entering a Description *
	    ▪ Smart Ticket OCR Feature
	    ▪ Walk Through
	    ▪ Submit a Smart Ticket by Attaching a Screen Shot *
	    ▪ Summary

- Requesting service via catalog items
  - Catalog Offerings
  - Walk Through
  - Order a Service from Available Catalog *
  - Human Resource Request
  - Walk Through
  - Submit a Human Resource Support Request *
  - To Do Items
  - Walk Through
  - Confirm the Completion of a Service Request and Request on Behalf of Another User *
  - Shopping Cart
  - Walk Through
  - Use Shopping Cart to Order Multiple Items *
  - Approval Process
  - Walk Through
  - Approve a Request and Delegate an Approval to Another User *
  - Summary
- Setting user preferences, profile and activating Mobile application
  - Preferences and Skills
  - Mobile Application
  - Walk Through
  - Update Your Profile, Set Skills and View Mobile Activation Steps*
  - Summary
- Tracking of company related requests
  - Company Request Tracking Tab
  - Grid Features
  - Walk Through
  - Navigate to Custom Tab, Sort, Filter and Review Requests *
  - Export to Excel
  - Walk Through
  - Export Data to Excel *
  - Summary
- Course Summary
  - Assessment

Module 4: SMAX for Configure and Asset Managers	▪ Course Introduction
	▪ Your Story
	▪ Organizing and tracking individual assets in the SACM model hierarchy
	    ▪ Environment
	    ▪ SACM Home Page
	    ▪ SACM Model Features
	    ▪ SACM Model Hierarchy
	    ▪ SACM Model Relationship
	    ▪ Service Definition
	    ▪ Walk Through
	    ▪ Create a Service Definition *
	    ▪ Actual Service
	    ▪ Walk Through
	    ▪ Create an Actual Service *
	    ▪ Service Component
	    ▪ Walk Through
	    ▪ Create a Service Component *
	    ▪ Device
	    ▪ Walk Through
	    ▪ Create a Device (Asset) Record *
	    ▪ System Element
	    ▪ UCMDB Mapping
	    ▪ Walk Through
	    ▪ Create a System Element *
	    ▪ Impact Analysis
	    ▪ Walk Through
	    ▪ View Impact Analysis *
	    ▪ Summary
	▪ Organizing and Managing the available devices
	    ▪ Stock Management
	    ▪ Reservations
	    ▪ Walk Through
	    ▪ Manage Stockroom and Reserve an Asset *
	    ▪ Asset Model
	    ▪ Receive Assets
	    ▪ Walk Through
	    ▪ Create an Asset Model and Receive an Asset *
	    ▪ Software Asset Management
	    ▪ Walk Through
	    ▪ Manage Software Asset License *
	    ▪ Subscriptions
	    ▪ Walk Through
	    ▪ Create a Subscription for an Asset Manually *
	    ▪ Summary

	▪ Managing service vendor relationships and contracts through their lifecycle
	  ▪ Vendors
	  ▪ Walk Through
	  ▪ Manage an Existing Vendor and Add a Brand *
	  ▪ Contract
	  ▪ Walk Through
	  ▪ Add a Maintenance Contract *
	  ▪ Summary
	▪ Publishing reports
	  ▪ Reporting
	  ▪ Dashboard
	  ▪ Walk Through
	  ▪ Create a Report and Manage the Dashboard *
	  ▪ Summary
	▪ Course Summary
	▪ Assessment

Module 5: SMAX for Service or Process Owners	▪ Course Introduction
	▪ Your Story
	▪ Categorizing and managing services and offerings
	  ▪ Environment
	  ▪ Service Catalog Hierarchy
	  ▪ Service Catalog Categories
	  ▪ Walk Through
	  ▪ Create a Service Catalog Category *
	  ▪ Service Definition
	  ▪ Create a Service Definition *
	  ▪ Service Offering
	  ▪ Walk Through
	  ▪ Create a Service Offering *
	  ▪ Support Offering
	  ▪ Walk Through
	  ▪ Create a Support Offering *
	  ▪ Human resource offering
	  ▪ Walk Through
	  ▪ Create a Human Resource Offering *
	  ▪ Service catalog bundles
	  ▪ Walk Through
	  ▪ Create a Bundle Offering *
	  ▪ Fulfillment plan
	  ▪ Approval Strategy
	  ▪ Walk Through
	  ▪ Add a Fulfillment Plan *
	  ▪ Summary

	▪ Defining and tracking review and resolution metrics
	  ▪ Time Periods
	  ▪ Walk Through
	  ▪ Create a Holiday and Work Schedule *
	  ▪ Service Level Target Set
	  ▪ Service Level Target by type
	  ▪ Service Level Target Duration
	  ▪ Service Level Targets by Record type
	  ▪ Walk Through
	  ▪ Create a Service Level Target Set and Update Target Definitions*
	  ▪ Support Agreements
	  ▪ Walk Through
	  ▪ Create a Support Agreement *
	  ▪ Service Agreements
	  ▪ Walk Through
	  ▪ Create a Service Agreement *
	  ▪ Operational Level Agreements
	  ▪ Walk Through
	  ▪ Create an Operational Level Agreement*
	  ▪ Summary
	▪ Organizing and handling knowledge articles
	  ▪ Knowledge Management Architecture
	  ▪ Global Search
	  ▪ Proactive Suggested Solutions
	  ▪ Module Integration
	  ▪ Walk Through
	▪ Global Search for Knowledge *
	  ▪ Article Model
	  ▪ Walk Through
	  ▪ Create an Article Model *
	  ▪ Knowledge Article
	  ▪ Walk Through
	  ▪ Create a Knowledge Article *
	  ▪ Knowledge Article Review
	  ▪ Walk Through
	  ▪ Review, Modify and Preview a Knowledge Article *
	  ▪ Knowledge Article Publish
	  ▪ Knowledge Article Consumption
	  ▪ Walk Through
	  ▪ Publish a Knowledge Article *
	  ▪ Knowledge Archival
	  ▪ Walk Through
	  ▪ Archive a Knowledge Article *
	  ▪ Summary

	▪ Organizing and handling other knowledge resources ▪ Hot News ▪ Walk Through ▪ Publish an IT News Article * ▪ Ask Friends/Help Friends ▪ Q&A Self Service Portal Views ▪ Q&A Moderation ▪ Walk Through ▪ Moderate Questions and Answers * ▪ Hot Topics Analytics ▪ Walk Through ▪ Analyze Self-Service Portal Knowledge Searches * ▪ Catalog Offerings ▪ Walk Through ▪ Create a Support Offering from a Hot Topic User Question * ▪ Article Management ▪ Walk Through ▪ Create a Knowledge Article from a Hot Topic Support Request * ▪ Summary ▪ Collecting user feedback and managing agent availability ▪ Survey Management – Create ▪ Walk Through ▪ Create a New Survey * ▪ Survey Management – Prepare ▪ Reporting ▪ Walk Through ▪ Prepare a Survey for Execution * ▪ Conduct a Survey ▪ Hot Topics Analytics ▪ Walk Through ▪ Manually Test the New Survey and Analyze Survey Data Using Hot Topics * ▪ On-call Schedule Management ▪ On-call Rotation ▪ Walk Through ▪ Set up On-Call Schedule Management * ▪ On-call Schedule Management ▪ Assignment Strategy ▪ Walk Through ▪ Setup an Assignment Strategy and Manage Notifications * ▪ Summary

	▪ Driving innovation with social collaboration for continuous improvement of IT services
	  ▪ Ideas
	  ▪ Walk Through
	  ▪ Create a New Idea *
	  ▪ Business Objectives and Resource Types
	  ▪ Walk Through
	  ▪ Create a New Business Objective and Resource Type *
	  ▪ Proposal
	  ▪ Proposal
	  ▪ Walk Through
	  ▪ Create a New Proposal *
	  ▪ Proposal Analytics
	  ▪ Walk Through
	  ▪ Use Proposal Analytics to Analyze Proposal Data *
	  ▪ Summary
	▪ Tracking and managing IT projects, programs, and portfolios
	  ▪ Executive Summary Dashboard
	  ▪ Walk Through
	  ▪ Navigate the Executive Summary Dashboard *
	  ▪ Project – Initiation
	  ▪ Walk Through
	  ▪ Create a Project *
	  ▪ Project – Planning
	  ▪ Walk Through
	  ▪ Plan a Project *
	  ▪ Project – Execute
	  ▪ Walk Through
	  ▪ Execute a Project *
	  ▪ Program – Initiation
	  ▪ Program – Planning
	  ▪ Program – Execute
	  ▪ Walk Through
	  ▪ Create and Edit a Program *
	  ▪ Project Portfolio
	  ▪ Walk Through
	  ▪ Create and Edit a Project Portfolio *
	  ▪ Summary

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Assessing and prioritizing applications to be modernized

Applications
Applications
Walk Through
Create and Edit an Application Record *
Portfolios
Walk Through
Create and Edit a Portfolio Record *
Optimizations
Optimization Type
Walk Through
Create an Optimization Record *
Review Optimization – Survey results
Walk Through
Review Optimization Record Details *
Proposal
Proposal
Walk Through
Create a Proposal from an Optimization Record *
Summary

Course Summary
Assessment

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<td>Module 6: SMAX for Tenant Administrators</td>
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Course Introduction
Your Story
Managing record type’s workflow

Environment
Studio
Studio Tabs
Record Type – Customizable
Non-Customizable Records
Field Editor
Field Types
Field Types
Field Properties
Walk Through
Create a Custom Field and Add it to the Record Type *
Calculated Fields
Walk Through
Add a Calculated Field *

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	▪ Forms Overview ▪ Forms Properties ▪ Walk Through ▪ Add Custom Field onto Required Forms * ▪ Processes ▪ Modify a Process ▪ Phases and Metaphases ▪ Transitions ▪ Walk Through ▪ Add Phase and Transition Rules * ▪ Studio Business Rules ▪ Business Rule Types ▪ Business Rules in a Workflow ▪ Process Events ▪ Process Events ▪ Business Rule Syntax ▪ Walk Through ▪ Add Business Rules * ▪ Notifications ▪ Walk Through ▪ Add Notifications and Brand It * ▪ Summary ▪ Customizing record type's workflow and lists ▪ Approval Definitions ▪ Governance Level Approval ▪ Walk Through ▪ Build an Approval Definition * ▪ Import Data ▪ Import Asset Data ▪ Export Data ▪ Walk Through ▪ Import and Export Data * ▪ Import Translations ▪ Walk Through ▪ Import Translations * ▪ Custom Actions ▪ SLT Settings ▪ Service Level Target by Type ▪ Walk Through ▪ Configure Custom Action and Manage Service Level Target Settings * ▪ Custom Applications and Records ▪ Walk Through ▪ Create Custom Application and Record Type * ▪ Volatile Lists ▪ Non-volatile Lists

	- Walk Through - Create a List * - Summary

	- Administering the Service Portal
	  - Service Portal Display
	  - Theme Settings
	  - Walk Through
	  - Create a Custom Theme and Describe Basic Settings *
	  - Category Tiles
	  - Background Styles
	  - Walk Through
	  - Design Category Tiles *
	  - Theme Settings Interface
	  - Theme Settings Interface
	  - Walk Through
	  - Configure Additional Display Settings *
	  - Service Portal Feature Settings
	  - Service Portal Feature Settings
	  - Service Portal Feature Settings
	  - Walk Through
	  - Manage Portal Feature Settings *
	  - Summary

	- Customizing settings and routing records to correct groups.
	  - Application Settings
	  - Application Settings
	  - Application Settings
	  - Application Settings
	  - Walk Through
	  - Customize Application Settings *
	  - Smart Analytics
	  - Smart Ticket OCR Feature
	  - Smart Ticket
	  - Walk Through
	  - Create a Smart Ticket Task *
	  - Smart Search
	  - Walk Through
	  - Customize Smart Search Settings *
	  - Routing definition
	  - Walk Through
	  - Create a Routing Definition *
	  - Summary

	- Administering people, locations and categories in the organization
	  - People
	  - People – Users
	  - Walk Through

	▪ Edit a User Record *
	▪ People – Contacts
	▪ Walk Through
	▪ Create a Contact Record *
	▪ Groups
	▪ Walk Through
	▪ Create a New User Group *
	▪ Roles
	▪ Permissions
	▪ Walk Through
	▪ Create a Role and Update Permissions *
	▪ Locations
	▪ Walk Through
	▪ Manage Locations *
	▪ Categories
	▪ Walk Through
	▪ Create a Category and Sub Category *
	▪ Summary
	▪ Securing record types and data
	  ▪ Entitlement Rules
	  ▪ Walk Through
	  ▪ Create an Entitlement Rule *
	  ▪ Encryption Domains
	  ▪ Encryption Domains
	  ▪ Security Codes
	  ▪ Walk Through
	  ▪ Create an Encryption Domain *
	  ▪ Strong Identity Validation
	  ▪ Walk Through
	  ▪ Set Strong Identity Validation for Approvals *
	  ▪ Data Domains
	  ▪ Data Domains Procedure
	  ▪ Data Domains to Records
	  ▪ Data Domain Impact
	  ▪ Walk Through
	  ▪ Define Data Domains *
	  ▪ Summary
	▪ Synchronizing, analyzing and debugging data
	  ▪ Package Management
	  ▪ Development/Production Tenants
	  ▪ Walk Through
	  ▪ Move Configuration Data Change *
	  ▪ Sample Data
	  ▪ Debug Tool
	  ▪ Debug Tool
	  ▪ Walk Through

	▪ View Sample Data and Perform Debug * ▪ Summary ▪ Learning Series Summary ▪ Learning Series Summary ▪ Assessment
Module 7: SMAX for Suite Administrators	❖ Course Introduction ❖ Your Story ❖ Setting up an email server ▪ SMAX Suite Admin Environment ▪ Mail Server ▪ SMTP (Simple Mail Transfer Protocol) ▪ SMTP Mail Server Certificates ▪ EWS (Exchange Web Services) ▪ Walk Through ▪ Configure a Mail Server * ▪ Summary ❖ Onboarding the required resources ▪ Customers ▪ Walk Through ▪ Create a Customer * ▪ Accounts ▪ Walk Through ▪ Create and Edit an Account * ▪ Users ▪ Walk Through ▪ Add a User to the Account * ▪ Summary ❖ Operating licenses ▪ Licenses ▪ Licenses ▪ Walk Through ▪ Create a Trial License * ▪ License Pools ▪ Walk Through ▪ Create a License Pool and Add License to the Pool * ▪ Summary ❖ Managing and deploying tenants ▪ Tenant ▪ Tenant ▪ Walk Through ▪ Create a Tenant, Assign License and Deploy It * ▪ Export and Import Tenant ▪ Walk Through ▪ Export and Import Tenant * ▪ Clone Tenant

	- Walk Through - Clone a Tenant * - Multi-Tenant Environment - Walk Through - Setup a Multi-Tenant Environment * - Summary - Administering the suite settings - Security and Export Configuration - Walk Through - Configure LW-SSO and Export Suite Configuration Data* - LDAP (Lightweight Direct Access Protocol) - Walk Through - View, Verify, and Modify LDAP Settings * - Smart Analytics - Walk Through - Manage Smart Analytics at Suite Level * - IDOL and License Expiration - Walk Through - Set Intervals for IDOL Based Search and Define License Expiration Notification * - Summary - Learning Series Summary - Learning Series Summary - Assessment

❖ Indicates a simulation.