Helix ITSM

BMC Helix Business Workflows 23.x: Fundamentals Administering (ASP)

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Course Code: SPPT-BWF1-2330-ASP

Modality	Duration	Applicable Versions	Target Audience
Assisted Self-paced (ASP)	3 Days	BMC Helix Business Workflows 23.3.01	• Administrators • Case Business Analyst

Course Overview

BMC Helix Business Workflows is a cloud-native case management application for all lines of business. It provides services to employees in a scalable, managed, and automated way. Built on BMC Helix Innovation Studio, it provides the ability to create automated workflows without writing code and tailor the user interface to meet the organization's need.

In this course, you will learn about the basic concepts of BMC Helix Business Workflows. You will also learn about configuring a line of Business cases, and templates. In addition to this, you will understand how to use BMC Helix Digital Workplace Catalog Service Requests to automatically create cases. You will also learn about questionnaires, dynamic case fields, implementing business processes.

This course combines classroom instruction with laboratory exercises to guide students through the basic concepts and configurations of BMC Helix Business Workflows.

Recommended Trainings

• BMC Helix Business Workflows 23.x: Fundamentals Using (WBT)

Learning Objectives

• Describe BMC Helix Business Workflow features and functionalities
• Explain the concept of BMC Helix Business Workflows for a line of business
• Describe the various roles and responsibilities
• Explain the concept of data access model
• Define basic services and make them available to employees
• Manage case, task, to do, and checklist templates
• Explain how BMC Helix Digital Workplace and BMC Helix Business Workflows work together
• Create questionnaires and dynamic case fields in BMC Helix Digital Workplace
• Configure dynamic assignments
• Configure approvals
• Configure Service Level Targets
• Define various terms related to Knowledge Management including knowledge sets and knowledge templates
• List the steps to develop a knowledge article
• Explain how to create and publish knowledge articles

Course Activities

• Student and lab guide as eBook
• Product community for questions and answers
• Course recording via WBT
• Access to instructor for up to 2 hours by appointment (use within 90 days of registration)

For more information about BMC Education Services, visit **www.bmc.com/education**.

Virtual Lab

- With this offering, you will receive student and lab guides as eBooks. You will have access to product and communities to answer your questions. All the course recordings will be available in the form of WBTs. You will have access to the instructors for up to 2 hours by appointment. Make sure to use this time up within **90 days** of registration.
- Lab Vouchers are issued at course registration time and must be redeemed within **90 days** of receipt. Once Lab Voucher is redeemed, **28 days** of lab access (portal access) are granted with **6 hours** of on-demand lab time to be used. Once the lab time is used, or the 28 days expires, the lab access ends.
- Click **here** for additional ASP virtual lab access information in a graphical format.

Course Modules

Module 1: Getting Started with BMC Helix Business Workflows
- Introduction to BMC Helix Business Workflows
- BMC Helix Business Workflows architecture
- Integrating BMC Applications
- BMC Helix Business Workflows roles and responsibilities
- Navigating BMC Helix Business Workflows

Module 2: Line of Business and Foundation Data
- Concept of line of business
- Setting Up a Line of Business
- Associating Foundation Data
- Data Access Model
- Overview of data access model
- Configure and verify the data access model
- Managing Content Packages and Content Use Cases

Module 3: Managing Cases, Checklists, and Tasks
- Configuring Case Search Options
- Managing Case Templates
- Overview of case and task management
- Case types and lifecycle
- Creating case template
- Updating case templates
- Task types and lifecycle
- Creating task template
- Task flow and types of task execution
- Introducing the task flow designer
- Adding a static assignment to the case template
- Adding a Checklist to Case Templates
- Creating Dynamic Fields
- Creating a To-do Task Template

Module 4: Configuring Automatic Case Assignment
- Configuring Case Assignment

Module 5: Managing Automatic Case Creation via BMC Helix Digital Workplace Catalog Requests
- Relating BMC Helix Digital Workplace Catalog to Business Workflows
- Configuring service connectors
- Process of enabling case creation via a service request
- Creating service questionnaires
- Adding a dynamic field to a case template
- Adding a dynamic field to a task template
- Overview of automatic case assignment
- Methods of configure automatic case assignment
- Process of Enabling Case Creation via a Service Request

Module 6: Configuring Service Targets
- Configuring Service Targets

Module 7: Configuring Task and Case Approvals
- Approval flow for a case or task
- Concepts of status trigger and expression
- Process of configuring task approvals
- Process of configuring case approvals
- Process of enabling ad-hoc approvals for cases

Module 8: Managing Knowledge Articles
- Various terms related to Knowledge Management including knowledge sets and knowledge templates
- Various Knowledge Management roles and permissions
- Steps to develop a knowledge article
- Process create and publish knowledge articles

Discount Options 🌐
Have multiple students? Contact us to discuss hosting a private class for your organization.
Contact us for additional information 🌐

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