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BMC Helix ITSM - Smart IT 20.x: Fundamentals Using Change Management (WBT)

COURSE ABSTRACT

COURSE CODE

» SPPT-SCMU-2002

APPLICABLE VERSIONS

» BMC Remedy with Smart IT 20.02 and 20.08

DELIVERY METHOD 🌐

» Web-based Training (WBT)

COURSE DURATION 🌐

» 6 Hours

PREREQUISITES

» NA

Course Overview

Helix ITSM - Smart IT sets a new standard for the modern workplace with an intuitive, social, and mobile experience to enable a more knowledgeable and collaborative workforce organized around IT roles.

This course gives Smart IT Change Management users an overview of the Smart IT main features and detailed Change Management features before they begin to use them in real time.

At the end of the course, the learners will be equipped with the knowledge to easily work with change management processes, the main features of Smart IT, change request creation through closure steps.

Target Audience

» Smart IT Users
   o   IT Agents
   o   Change Agents

Learner Objectives

» Explain the Smart IT concepts and features
» Explain various Smart IT Records with details
» Explain the Smart IT roles, related permissions, respective responsibilities, and data access
» Describe how to work with the Ticket Console and Smart Recorder
» Explain the different features and functionality available with Smart IT for Change Management
» Describe the important actions related to change requests available in Smart IT
» Explain how to use the Change calendar, Impact Analysis, and Collision Management in Smart IT
» Explain Task, Task Phase Management, Task Template, and Task Phases
» Describe the email, chat, and broadcast functionality in Smart IT
» Discuss the purpose, goals, and objectives of Smart IT Change Management
» Discuss the Change Management lifecycle and process flow
» Explain the Change Management roles
» Create a change request
» Approve a change request
» Plan and schedule a change request
» Create and manage Tasks
» Review Collision and Impact Analysis
» Implement a change request
» Close Change Request

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COURSE ABSTRACT

COURSE ACTIVITIES
» Demonstrations
» Product Simulations
» Assessment

BMC HELIX WITH SMART IT LEARNING PATH
https://www.bmc.com/education/courses/smart_it_training.html#accordion-74c8af9f-46d5-4b0c-b9e9-bac5effcc328

ACCREDITATION AND CERTIFICATION PATHS 🌐
» Not applicable

DISCOUNT OPTIONS 🌐
» Have multiple students? Contact us to discuss hosting a private class for your organization
» **Contact us for additional information** 🌐

Course Modules

Module 1: Smart IT Personas, Permissions, and Access Control
» Smart IT personas and permissions
» Responsibilities of different Smart IT roles
» How access to tickets and resources works in Smart IT
» Explain BMC Remedy ITSM Data Access Model
» Explain Row-level security (RLS) and Hierarchical groups
» Impact of RLS and hierarchical groups on access to tickets and resources

Module 2: Smart IT Overview and Concepts
» Overview of Remedy with Smart IT
» Main features of Smart IT
» Access Smart IT
» Mobile device compatibility and benefits for Smart IT
» Smart IT Dashboard functionality
» Change Calendar
» Various Smart IT Search options
» Explain various Smart IT consoles
» Explain the Preset, Filters, and Bulk Actions features
» Discuss Activity and Update Feeds
» Pin and Unpin Feature

» Overview of Smart IT Knowledge Articles
» Smart Recorder Overview
» Various features and functionalities of Smart Recorder
» Create a new customer profile from Smart Recorder
» Smart Recorder and Call Log Events

Module 3: Records in Smart IT
» Record Details for Incident Tickets, Work Orders, Tasks, and Service Requests
» Record Details for Change Requests
» Record Details for Problem Investigation and Known Errors
» Record Details for Known Errors
» Explain various Categories
» How to assign tickets in Smart IT
» Change ticket assignment and status
» Explain Service Level Agreement (SLA) progress bar in Smart IT

Module 4: Task Management in Smart IT
» Tasks Overview
» Task Phase Management
» Review Task Phases
» Introduction to Task Template
» Add and Manage a Task

» Assign, Sequence, Implement, and Close Task

Module 5: Ways to Communicate in Smart IT
» Explain Broadcasts in Smart IT
» Set up and receive Broadcasts
» Email Functionality in Smart IT
» Send Email Messages from Tickets
» Attach Files and Knowledge Articles in Emails
» Chat Feature Overview
» Chat Feature: Keywords
» Use Microsoft Teams for ChatOps-type Interaction
» Use Live Chat with User

Module 6: Smart IT Change Management Overview and Processes
» Discuss the purpose, goals, and objectives of Smart IT Change Management
» Discuss the Change Management life cycle and process flow
» Discuss various terms and concepts used in Smart IT Change Management
» Explain different types of change classes
» Discuss Change Request Transition states for different Change Classes

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Module 7: Smart IT Change Management Functional and Other Roles
» Explain roles and responsibilities of Change Coordinator
» Explain roles and responsibilities of Change Manager
» Explain roles and responsibilities of Change Approver and CAB
» Explain roles and responsibilities of Specialist/Task Implementer

Module 8: Creating a Change Request
» Describe the Change Initiation and Recording stage
» Different Sources of Change Request
» Explain Different ways to create a change request
» Difference in UI labels in Remedy IT Service Management and Remedy with Smart IT
» Create Change Request from Scratch
» Create Change Request Using Template
» Create Change Request by Copying Change
» Create Change Requests as Rollbacks
» Resubmit a Rejected Request

Module 9: Approving a Change Request
» Describe the Change Approval stage in Change Management
» Out-of-the-box for BMC Change Management Approval processes
» Approve a change request
» Review the Change Request for Deviations
» Approve Change Request
» Add non-approver notifications
» Approve Alert
» Add Approvers to Change Requests

» Add Alternate Approvers
» Review and Approve Change Request

Module 10: Planning and Scheduling a Change Request
» Describe the Plan and Schedule stage in Change Management
» Apply Filters Change Requests Assigned to you
» Review the Change Request for Completeness
» Edit a Change Request
» Relate Required Implementation Plan Tasks
» Identify, add, and delete Configuration Item (CIs)
» Impact Analysis and Collision Management in Smart IT
» Schedule Change Request and Managing Collisions
» View Collisions in Change Calendar
» Reschedule the Change Request
» Answer Technical Risk Questions and Finalise Risk Assessment
» Review and Manage Task Details
» Review Implementation Risks
» Relate Additional Configuration Items

Module 11: Implementing a Change Request
» Describe the Implement stage
» Review Change Request - by Change Coordinator
» Implement Tasks - by Task Implementer
» Close Tasks - by Task Implementer
» Change Completion

Module 12: Closing a Change Request
» Describe the Closed stage
» Close Stage Process
» Review and Update Change Request
» Review Task Details
» Add Closure Details
» Update Change Request Status and reason

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