



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

COURSE ABSTRACT

COURSE CODE

» SPPT-SPMU-2002

APPLICABLE VERSIONS

» BMC Remedy with Smart IT 20.02 and 20.08

DELIVERY METHOD

» Web-based Training (WBT)

COURSE DURATION

» 4 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 Problem Management users an overview of the Smart IT main features and detailed Problem 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 problem management processes, the main features of Smart IT. They learn how to create, review, and close a problem investigation and a known error.

Target Audience

- » Smart IT Users
 - IT Agents
 - Problem 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 Problem Management and other applications
- » 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 Problem Management
- » Discuss the Problem Management lifecycle and process flow
- » Explain the Problem Management roles
- » Create a Problem Investigation
- » Create a Known Error
- » Perform root cause analysis
- » Close Problem Investigation and Known Error

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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 Problem Management Concepts, Processes, and Functional Roles

- » Describe Service Desk
- » Describe the primary goal of Service Desk
- » Describe the business value of Service Desk
- » Describe Problem Management goals and mission
- » Describe Problem Management terminologies
- » List various Problem Management roles and responsibilities

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- » Describe various Problem Management permissions
- » Describe the Problem Investigation life cycle
- » Explain the Problem Coordinator role, its responsibilities, and permissions
- » Explain the role of the Problem Coordinator during the various Problem Investigation life cycle stages
- » Explain the Specialist role, its responsibilities, and permissions
- » Explain the role of the Specialist during the various Problem Investigation life cycle stages

Module 7: Registering a Problem Investigation

- » Describe the Incident Request review procedure
- » Explain the Incident Review phase
- » Examine unreviewed Incident Requests
- » Describe different ways to create a Problem Investigation
- » Create a Problem Investigation from an Incident Request
- » Create a Problem Investigation from New Menu
- » Explain the Problem Investigation assignment and its types

Module 8: Analyzing Root Cause

- » Describe the Root Cause Analysis procedure as a part of the Problem Investigation life cycle
- » Discuss various steps involved in the Root Cause Analysis procedure
 - Reviewing and updating problem records
 - Recording solutions
 - Updating Problem Investigations
 - Proposing and implementing solutions
 - Creating a Known Error

Module 9: Reviewing the Problem Investigation Results

- » Review the Root Cause Analysis procedure
- » Create a Known Error record
- » Reassign a Problem Investigation for analysis
- » Describe relationship and its types
- » Establish Problem Investigation relationships
- » Create a Change Request from a Problem Investigation or Known Error
- » Relate a Knowledge Article to a Problem Investigation
- » Record a Known Error and Root Cause in a Knowledge Article from a Problem Investigation

Module 10: Closing a Problem Investigation

- » Review the Problem Closure procedure
- » Verify the structural solution
- » Close the Problem Investigation and Known Error
- » Update a Problem Investigation and Known Error at an impasse
- » Perform periodic checks