



BMC Helix ITSM - Smart Reporting 20.x: Fundamentals Administering

COURSE ABSTRACT

COURSE CODE

- » SPPT-SRUA-2008

PRODUCT RELEASE

- » BMC Remedy Smart Reporting 18.05, 18.08, 19.02, 19.08, 20.02 and 20.08

DELIVERY METHOD

- » Instructor-led Training (ILT)

COURSE DURATION

- » 2 Days

PREREQUISITES

- » BMC Helix ITSM – Smart Reporting 20.x: Fundamentals Using (WBT)

Course Overview

BMC Remedy Smart Reporting is an easy-to-use report writer for non-technical users, delivering drag-and-drop simplicity for formatting and data selection. It is designed to reuse components, such as Source Connections and Views. Advanced features like Automated Insights can be used to gain more proficiency for report creation.

This two-day course provides students with the information and hands-on lab exercises for administering BMC Remedy Smart Reporting.

This course is applicable primarily to the Administrators who are responsible for onboarding, offboarding and configuring BMC Remedy Smart Reporting. The learners will be guided on how to manage content, work with views, optimize product performance, troubleshoot, and perform other administering tasks.

Note: It is suggested that learners have a basic understanding of their:

- » Data sources (typically the application that you work with) and its corresponding structure
- » Reporting needs and ability to translate that into relevant input to create reports

IMPORTANT: The **BMC Certified Associate: Helix ITSM - Smart Reporting 20.x for Administrators Online Exam** is included in this course. Taking the exam and pursuing certification is optional. You will have one attempt to pass the exam. Retakes according to the [BMC Certification Policy](#) are available for an additional fee. Those who pass will receive the title of **BMC Certified Associate: Helix ITSM Smart Reporting 20.x Administrator**.

Target Audience

- » Reporting Administrators

Learner Objectives

- » BMC Remedy Smart Reporting features and benefits
- » Social collaboration through BMC Remedy Smart Reporting
- » Understand the Deployment, Onboarding and Offboarding processes for BMC Remedy Smart Reporting
- » Enable and use Automated Insights
- » Import content in BMC Remedy Smart Reporting with user-friendly interface
- » Explore Java based BMC Remedy Smart Reporting User Sync utility
- » Work with views, including view design methodology and creating views (archived forms also)
- » Configure row-level security for reports using Access Filters
- » Export existing reports and Import audit reports
- » Update cross-launch settings
- » Configure BMC Remedy Smart Reporting log settings
- » Change the frequency of the user sync job and the Super Admin password
- » Optimize BMC Remedy Smart Reporting performance
- » Perform the steps to resolve or troubleshoot the commonly found errors

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COURSE ACTIVITIES

- » Classroom Presentations
- » Hands-on Lab Exercises
- » Demonstrations


BMC REMEDY SMART REPORTING LEARNING PATH

- » <https://www.bmc.com/education/courses/edu-lp-remedy-service-mgmt-training.html>

ACCREDITATION AND CERTIFICATION PATH

- » NA

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: Introduction to BMC Remedy Smart Reporting

- » BMC Remedy Smart Reporting Overview
- » Accessing Reports
- » Collaborating with BMC Remedy Smart Reporting

Module 2: BMC Remedy Smart Reporting Onboarding

- » Deployment and Onboarding Overview
- » Onboarding Users
- » Importing Content
- » Configuring Mid Tier and Verifying Onboarding

Module 3: Defining and Modifying Views

- » Define views and its components
- » Various field types
- » Steps involved in view design methodology
- » Advanced Analytics: Automated Insights
- » Steps to create and edit a view
- » Steps to create a view for an archive form
- » Configure Reference Codes
- » Geo Packs overview

Module 4: Creating Content

- » Steps to create a custom report
- » Design Charts
- » Steps to create a dashboard tab
- » Analytic Setup for Dashboard reports

Module 5: Configuring BMC Remedy Smart Reporting

- » Steps to set row-level security variables
- » Steps to update cross-launch settings

Module 6: BMC Remedy Smart Reporting Administration Console

- » Administration Console features and functionality including:
 - Main Panel items
 - Configuration and Administration options
 - Additional functionality available to a Super Admin
- » Configuration options

Module 7: Additional Administrative Tasks

- » Configuration of BMC Remedy Smart Reporting log settings

- » Updating the Data Source connection password
- » Changing the frequency of the user sync job
- » Changing the BMC Remedy Smart Reporting Super Admin password
- » Setting up Audit Reports
- » Optimizing BMC Remedy Smart Reporting performance
- » Troubleshooting steps for most commonly observed Smart Reporting issues

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