



# BMC Remedy Smart Reporting 9.x: Fundamentals for Users and Administrators (ASP)

## COURSE ABSTRACT

### COURSE CODE

- » SPPT-SRUA-0910-ASP

### APPLICABLE VERSIONS

- » BMC Remedy Smart Reporting 9.0 and 9.1

### DELIVERY METHOD

- » Assisted Self-paced (ASP)
  - » Student and lab guide as ebook
  - » Product community for questions and answers
  - » Course recording via WBT
  - » Access to instructor for up to 1 hour by appointment (use within 90 days of registration)

### VIRTUAL LAB ACCESS

- » 12 hours of virtual lab (=portal) access. A Virtual Lab access voucher will be provided and must be redeemed within 90 days of registration for 28 days of Portal access.
- » Click [here](#) for additional ASP virtual lab access information in graphical format.

### COURSE DURATION

- » Equal to 2 Days

### PREREQUISITES

- » *BMC Remedy Smart Reporting 9.1: 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.

This course, which also includes the BMC Remedy Smart Reporting 9.1: Using (WBT) course, introduces learners to the key features and functionality of the BMC Remedy Smart Reporting application. It primarily covers the report creation process in BMC Remedy Smart Reporting. It also covers the creation of other Smart Reporting elements, including dashboard tabs and storyboards. In addition, learners will be guided on how to manage content, work with views, optimize product performance, troubleshoot, and perform other administering tasks.

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

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

## Target Audience

- » Users – BMC Remedy Smart Reporting Users (Report Writers, Corp Writers, Report Consumers, and Dashboard Consumers)
- » Administrators – BMC Remedy Smart Reporting Administrators

## Learner Objectives

- » Introduce BMC Remedy Smart Reporting and list its associated roles
- » Discuss the different functionality areas of the BMC Remedy Smart Reporting Console
- » Create and work with reports, storyboards, and dashboard tabs
- » Deploy and install BMC Remedy Smart Reporting
- » Understand the different methods for onboarding users and importing content in BMC Remedy Smart Reporting
- » Work with views, including view design methodology and creating views (for archived forms also)
- » Understand the functionality on the BMC Remedy Smart Reporting Administration Console
- » Configure various BMC Remedy Smart Reporting settings
- » Provide methods to resolve or troubleshoot the most commonly found errors



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### COURSE ACTIVITIES

- » Video teaching
- » Course eBook
- » Virtual Lab
- » Community Access


### BMC REMEDY SMART REPORTING LEARNING PATH

<http://www.bmc.com/education/courses/edu-lp-remedy-service-mgmt-training.html#A-7>

### ACCREDITATION AND CERTIFICATION PATHS

- » NA

### DISCOUNT OPTIONS

- » Have multiple students? Contact us to discuss hosting a private class for your organization
- » [Contact us for additional information](#) 

## Course Modules

### BMC Remedy Smart Reporting 9.1: Using (WBT)

#### Module 1: Introduction to BMC Remedy Smart Reporting

- » Overview of BMC Remedy Smart Reporting
- » Chief elements of BMC Remedy Smart Reporting
- » BMC Remedy Smart Reporting roles
- » Functional areas of the BMC Remedy Smart Reporting Console
- » BMC Remedy Smart Reporting Console access from Mid Tier and Smart IT Console
- » Predefined reports and dashboards including Service Dashboard and HRCM reports

#### Module 2: Navigating the BMC Remedy Smart Reporting Console

- » Dashboard
- » Browse page
- » My Content
- » Inbox
- » Timeline
- » Sections and tabs of User Profile Area

#### Module 3: Creating Reports

- » Drag-and-drop Report Builder
- » Steps to create a custom report
- » Report functionality including aggregation, advanced functions, calculations, sections, report filters, and sub query
- » Report and chart formatting options
- » Save and edit options available for active and draft reports
- » Collaboration options for BMC Remedy Smart Reporting

#### Module 4: Smart Reporting Storyboards and Dashboards

- » Storyboard elements
- » Steps to create a storyboard
- » Work with storyboards
- » Steps to create a dashboard tab
- » Dashboard layout and settings
- » Dashboard actions

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## COURSE ABSTRACT

### BMC Remedy Smart Reporting 9.x: Fundamentals for Administrators (ASP)

#### Module 1: Introduction to BMC Remedy Smart Reporting

- » Overview of Smart Reporting
- » Key features of Smart Reporting
- » Chief Elements of BMC Remedy Smart Reporting
- » Smart Reporting roles
- » Smart Reporting interface
- » Report types
- » Service Dashboards
- » Audit Reports
- » Collaboration methods, such as comments, annotations, and broadcasts
- » Overview of solution architecture
- » Reporting Layer Architecture

#### Module 2: BMC Remedy Smart Reporting Deployment and Installation

- » Three methods of BMC Remedy Smart Reporting deployment
- » BMC Remedy Smart Reporting Installation process flow
- » Steps for installing BMC Remedy Smart Reporting

#### Module 3: BMC Remedy Smart Reporting Onboarding

- » Onboarding overview, process, and types
- » Onboarding Users (Single company, multi company with one company at a time, and multi company with bulk onboarding)
- » User Sync Utility in BMC Remedy Smart Reporting
- » Deleting a Customer/Company from BMC Remedy Smart Reporting
- » Importing Content
- » Configuring BMC Remedy Mid Tier to access BMC Remedy Smart Reporting
- » Verifying Successful Onboarding and Content Import

#### Module 4: Creating Content

- » Define views
- » Steps involved in view design methodology
- » Steps to create a view
- » Steps to create a view for archived forms
- » Geo Packs overview
- » Steps to create a custom report
- » Add a Union Sub Query to a Custom Report
- » Steps to create a dashboard tab

#### Module 5: Configuring BMC Remedy Smart Reporting

- » Steps to complete the configuration after onboarding of BMC Remedy Smart Reporting
- » Steps to set row-level security for reports and 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

#### Module 7: Additional Administrative Tasks

- » Configuration of BMC Remedy Smart Reporting log settings
- » Changing the frequency of the user sync job
- » Changing the BMC Remedy Smart Reporting Super Admin password
- » Setting up Audit Reports
- » Optimizing performance
- » Troubleshooting steps for a few Smart Reporting issues