SMAX Tenant Administration (3-7416)

ID 3-7416 **Price** on request **Duration** 3 days

Who should attend

Tenant Administrators, Service Owners, IT Agents, and Process Owners or Managers.

Prerequisites

To be successful in this course, you should have the following prerequisites or knowledge:

- Basic knowledge of the Information Technology Service Management (ITSM) processes and have a foundational understanding of IT service management (ITSM) concepts
- Knowledge and practical experience with the Out-of-the-Box (OOTB) processes, including Request, Incident, Change, and Problem Management. Additionally, familiarity with Service Management User Interface (UI) terminologies such as forms, fields, records, workflows, and dashboards are essential for successfully navigating and applying the administrative concepts covered in this course.
- Prior experience navigating the Service Portal and basic knowledge of Service Management administration is also recommended

Course Objectives

On completion of this course, participants should be able to:

- Design the look and feel of the Service Portal
- Describe and customize the service portal configuration settings
- Describe and customize the global application settings
- Configure and interact with the smart virtual agent intelligent automation solution
- Customize the Smart Ticket setting, Smart Search behaviors, and intelligent suggestions
- Create an automatic routing solution for routing records to the correct groups based on the information contained in the record.
- Manage People (Users and Contacts), organize them into Groups, and assign Roles
- Configure and manage dashboards
- Define Locations and Category hierarchies to support request routing, access control, and service classification.
- Use Entitlement Rules, Encryption Domains, Strong Identity Validation, and Data Domain Segmentation to ensure secure visibility, access restrictions, and identity-based access and segmentation across users, groups, and roles
- Describe Multi-Tenant (MT) Console for shared service providers
- Use Dev2Prod process to transfer configurations and content between two tenants
- Describe the data collections available for demonstration or business use

Course Content

Chapter 1: Course Overview

- Explain the daily classroom schedule and structure.
- Review the overall course objectives.

Chapter 2: Service Portal Display Administration

- Describe the purpose and capabilities of the Service Portal
- Customize the look and feel of the portal using the Theme Settings interface
- Preview and manage themes using the Theme Settings interface
- Create a custom theme
- Design header
- Select a background image
- Design the category tiles
- Enable custom theme
- View the newly designed Service Portal
- Review the Theme Settings user interface items
- Apply branding guidelines for the theme settings color picker
- Create, preview, and manage themes:
- Configure headers, logos, colors, action ribbons, and backgrounds
- Define global and section-specific visual elements
- Design and organize Category Tiles and control their appearance
- Set up entitlement rules to manage theme visibility by user groups, location, or roles
- Embed custom widgets using:
- Static HTML
- Web Components with iframe or Shadow DOM

encapsulation

Chapter 3: Service Portal Configuration Settings

- Explain the structure and purpose of the Service Portal feature selection settings
- Configure default self-service behaviors, such as:
- Portal loading behavior
- Ribbon promotions
- Show the portal profile page on first login
- Approval options via email
- Define how requests are created when no matching search or virtual agent result is found (using MANDATORY, OPTIONAL, SKIP, IGNORE modes)
- Enable or disable:
- Session timeout alerts
- Sidebars
- Featured tabs
- Smart suggestions and filters
- Configure and use customized tabs to display filtered request data for specific roles
- Embed JavaScript actions within the Service Portal (e.g., sidebar links triggering actions)
- Customize date and time formats per language for portal and agent interface consistency
- Create and manage custom action buttons to progress request workflows
- Set up Ask Friends / Help Friends Q&A visibility, posting rights, and expert matching
- Control asset and subscription visibility based on user roles and hierarchy
- Enable request editing by users in Service Portal using business rules

Chapter 4: Application Global Settings

- Describe and configure Application Settings for general behavior, security, notifications, and integrations
- Differentiate access and visibility through settings for entity links/associations
- Enable and customize the Notification History module to monitor and troubleshoot email notifications
- Enable and tailor the Experience Mode to define module visibility based on assigned licenses
- Set up and schedule data purging (soft deletion) for closed records by type and timeframe
- Access and interpret User Management Reports (UMR) for users, roles, groups, and license consumption
- Enable and configure Expert Recommendation for request handling based on skills and Hot Topics
- Use Global Search configuration to manage index fields, searchable entities, and reindexing strategies
- Configure and extend the Agent Inbox to support consolidated work views across record types
- Customize and deploy Mobile App Settings for both self-service and agent functionality

Chapter 5: Intelligent Automation - Smart Virtual Agent

- Explain the role of Artificial Intelligence, Machine Learning, and Natural Language Processing (NLP) in IT support automation
- Describe the core features, architecture, and components of the Smart Virtual Agent
- Enable and configure the Smart Virtual Agent using application and AI settings
- Implement intents through:
- Automatic Learning (Entity Link Action Mode)
- Manual Configuration (Entity Link and Conversation Action Modes)
- Define and manage User Options to extract parameters from user input during chat
- Configure conversation flows using JSON scripts to support dynamic data capture.
- Apply best practices for intent naming, training sentence design, and parameter mapping
- Train, export, and import intent models across tenants
- Enable and manage multi-language support for intents and virtual agent messaging

Chapter 6: Intelligent Automation – Smart Analytics and Routing Definitions

- Describe the role of Smart Analytics in automating ticket categorization and improving support operations
- Submit Smart Tickets from the Service Portal or by email with text and image-based input
- Explain how OCR (Optical Character Recognition) supports image-based ticketing
- Create, configure, train, and test Smart Ticket tasks using historic request data
- Use Smart Search to enhance self-service and agent problem resolution.
- Configure Smart Search Settings to control result relevance and user experience
- Implement Intelligent Suggestions to auto-populate fields like Assignee, Offering, Service, and Category based on historical data and business rules
- Define and apply Routing Definitions to automate record assignments
- Build multi-lane routing logic using Organizations, Locations, and Actual Services
- Apply routing definitions using Set Field and Define Suggested Values business rules
- Use Expression Language to dynamically reference related fields for routing logic
- Troubleshoot and maintain routing configurations, ensuring accurate group assignments

Chapter 7: Master Data Management

- Describe briefly the core data concept of Service Management
- Explain the People to be included in the Service Management Implementation
- Differentiate between Users and Contacts
- Describe the various methods to create users and contacts
- Explain the user authentication methods
- Manage the People
- View users and contacts
- Add, edit, delete, and sync users in Suite Administration
- Manage users in the tenant
- Unlock users
- Reset password
- Change person type
- Create users or contacts
- People and Groups
- Describe User-based license assignment and consumption
- Administer Groups:
- Functional vs Organizational Groups
- Create a group
- Groups and People
- Groups and Roles
- Group assignment strategy
- Manage Roles and their importance in aligning responsibilities with system access and process action
- Out of the box roles
- Create a role
- Role permissions
- Assign roles
- Configure and maintain Locations
- Define and structure Category hierarchies
- View the Dashboard definitions
- Define a default dashboard via the Person record or user preferences
- Distinguish between Public, Group, and Private dashboards
- Describe the role permission dependencies for viewing and editing dashboards
- Apply and manage record-level access controls for dashboards
- Create and manage Dashboard Definitions
- Add, remove, rearrange, and configure reports on a dashboard
- Manage the Dashboard Definition lifecycle
- Set a system-wide default dashboard

Chapter 8: Data Security Management

- Create and apply Entitlement Rules to control visibility of record types in the Service Portal
- Configure and apply Encryption Domains to protect sensitive record fields.
- Enable and set up Strong Identity Validation for approval workflows using passcode and one-time authorization
- Define and manage Data Domains to restrict access to specific records in the agent interface

Chapter 9: Administration Utilities

- Use the Multi-Tenant Console for shared service providers.
- Explain the Dev2Prod functionality
- Describe Data collection in Service management

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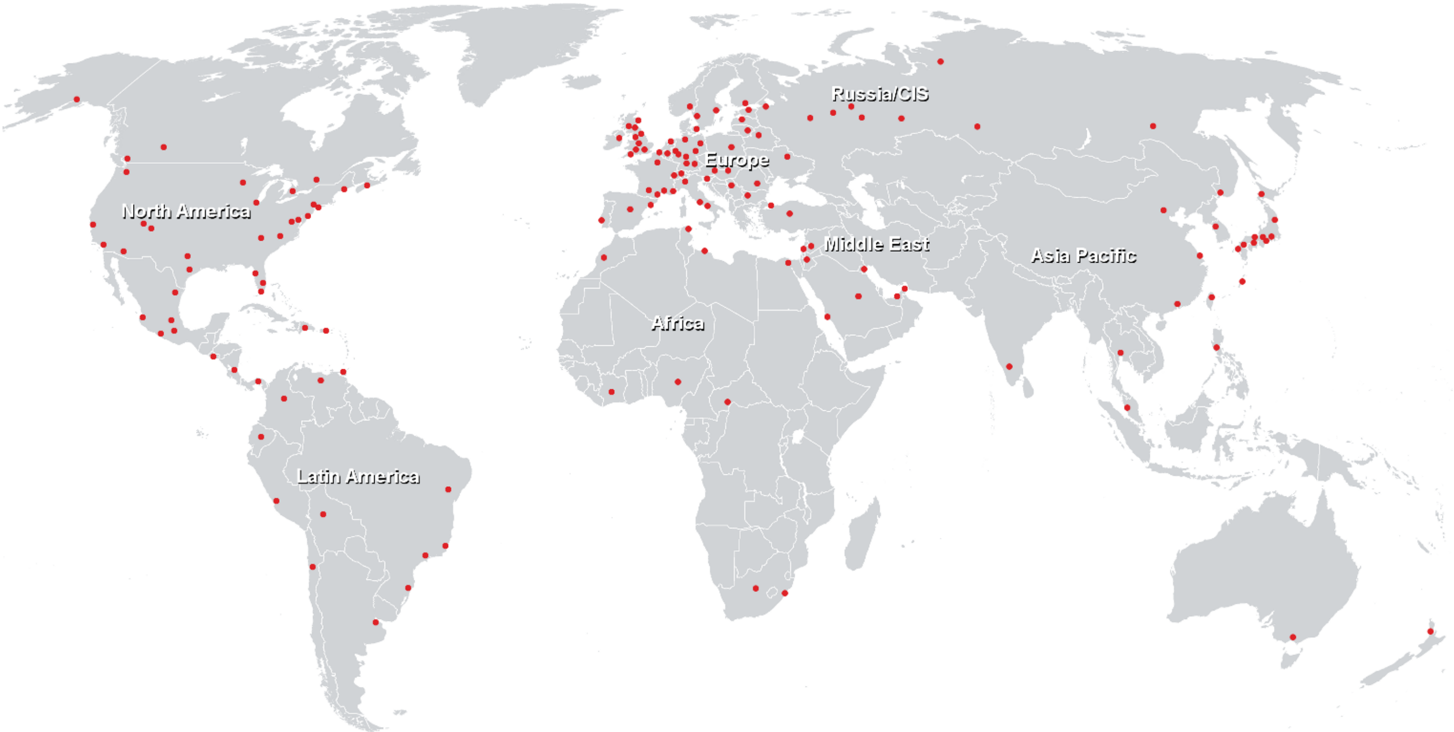

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