SMAX Application Workflows Design (SMAX-AWD)

ID SMAX-AWD   **Prix** sur demande   **Durée** 2 jours

A qui s'adresse cette formation

Tenant administrators and suite administrators

Pré-requis

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

- Basic knowledge of the IT Service Management (ITSM) processes
- Knowledge of the Out-of-the-box (OOTB) SMAX Processes – Request, Incident, Problem, Change, and Release Management
- Basic knowledge of Information Technology Infrastructure Library (ITIL) concepts

Objectifs

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

- Define and edit a record type’s fields that are derived from the metadata for the record type.
- Edit the out-of-the-box forms defined for each record type.
- Define and edit a record type workflow and run business logic for those records using business rules defined by Expression Language syntax.
- Create and edit notification templates that are pre-formatted email messages.
- Configure notifications to be sent to the relevant recipients at specific points in a record’s workflow through business rules.
- Configure approvals in the approval definition tab for those record types where approvals must be granted at a certain stage in their workflow.
- Import record data for the selected record type in CSV format.
- Import localized data files for the category, service definition, and offering record types.
- Configure custom actions for the selected record type.
- Control the notifications sent for Service Level Target breaches for incidents and requests.
- Describe how to enable global search.
- Manage strong identity validation for the approval task

process.
- Create a new application and record type and set the behaviors through the different studio features.

Contenu

Module 1: Course Overview

- Identify the contents and objectives of the course
- Define the class schedule and class logistics
- Identify the related courses
- Discuss the lab environment details

Module 2: SMAX Studio – Main Building Blocks

Module 2a: Configuring Fields and Forms

- Describe the features of codeless configuration
- Explain how Studio capability enables a tenant admin to manage workflows for record types
- Explain in detail the two main building blocks: Fields and Forms
- Describe how to use Studio codeless configuration to:
- Add custom fields
- Modify forms
- Create or edit Lists

Module 2b: Configuring Processes and Rules

- Describe process workflows
- Add a new phase and transition
- Explain business rules
- Add a rule to a phase or transition
- Use the Expression Language
- Debug expressions
- Discuss advanced Expression Language

Module 3a: SMAX Studio – Additional Features Part 1

- Work with Notifications
- Describe how to build an approval definition
- Explain how to import record data
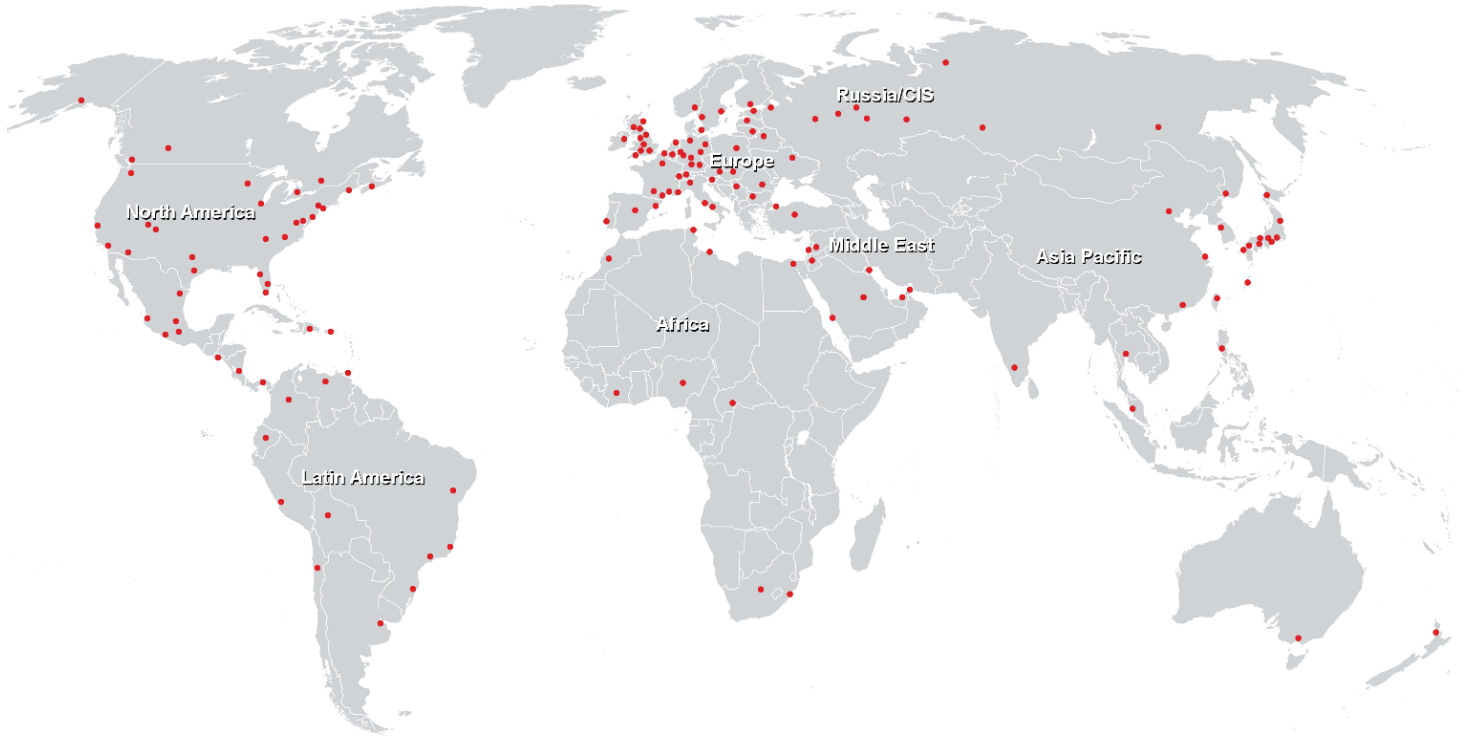- Explain how to import localized data files (translated records)

Module 3b: SMAX Studio – Additional Features Part 2

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- Configure custom actions
- Describe how to control Service Level Target settings
- Describe how to enable global search
- Explain how to set strong identity validation for approvals in the Authorization tab

Module 4: SMAX Studio – Building Custom Applications

- Create a Studio application: Basics
- Describe the custom application design considerations
- Explain the custom application design process
- Create a new table and add entries to the menu structure
- Add fields to the record type
- Define forms and configure workflow and business rules
- Configure notifications
- Add an approval
- Define custom actions
- Activate Service Level Management
- Discuss additional features available for custom applications

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