

# SM150 - Service Manager 9.x Technical Configuration



## Course description

This introductory course provides you with the technical skills needed to effectively use and configure the HP Service Manager 9.x software product. This course focuses on configuring Service Manager to match the processes, policies, and procedures in the out-of-the-box environment. This course is a mixture of lectures and hands on exercises. This course covers software versions 9.21 and 9.3 and the hands on labs use software version 9.3.

## Who should attend

This course is designed for technical users who are new to HP Service Manager.

Customers: Administrators, developers, web developers, and managers who are responsible for configuring and tailoring Service Manager 9.30.

For Process Owners, Project Managers, and other managers who desire a more technical view of Service Manager than the Service Manager 9.30 Foundations process oriented class.

## Prerequisites

For complete prerequisites and requirements to achieve any of the related certifications or upgrade paths, see the certification description on the HP ExpertOne website.

## Topics

- Module 1: Introduction to Service Manager
  - Describe the intent of Service Manager.
  - Define how Service Manager fits in ITSM portfolio and ITIL
  - Describe Service Manager processes and best practices.
  - Describe ITSM features within Service Manager.
  - List HP products that integrate with Service Manager.
- Module 2: Navigating Service Manager
  - Log into and compare the Service Manager Web and Windows Client interfaces.
  - Use queues and views.
  - Save a view to Favorites.
  - Use the options menu and toolbar functions.
  - Change the Service Manager Interface settings.
  - Search records, and use advanced capabilities.
  - Navigate to online help.
- Module 3: Understanding the Service Manager Processes
  - Describe the goals, features, and benefits for each of the Service Manager components.
  - Understand the Service Manager processes and workflows.
  - Describe the embedded Best Practices.
  - Understand the workflows.
  - Describe the interoperability among the Service Manager modules.
- Module 4: User Security Administration
  - Identify the relationship among environment, operator, profile, capability words, and user roles.
  - Understand environment records.
  - Connect to Service Manager as different users
  - Add permissions to applications for users.
  - Understand how menus are mapped to user roles.
  - Create and edit profiles.
  - Create roles.
  - Define security folders.
- Module 5: Approvals and Approval Delegations
  - Define approvals and approval groups.
  - Approve changes and requests.
  - Add approvers.

<b>Course ID</b>	00650643
<b>HP product number</b>	SM150
<b>Course format</b>	ILT, SCA
<b>Typical Course length</b>	5 days
<b>Delivery languages</b>	English
<b>Related certifications</b>	<ul style="list-style-type: none"> <li>• <a href="#">HP AIS - Service Manager v9</a></li> </ul>

### [Register for this course.](#)

Register for this course on the HP Software Education website. Select your region and country, and enter the course name in the search box.

- Delegate approval authority to another group or operator.
- Module 6: Reporting
  - Describe the reporting options available with Service Manager
  - Integrate Service Manager with Crystal Reports.
- Module 7: Configuring the Configuration Management Module
  - Understand how to switch a CI to a different type.
  - Understand CI Groups and CI Relationships.
  - Understand baselines.
  - Understand authorized and actual CI states.
  - Configure the environment record settings.
  - Add a new CI type.
- Module 8: Configuring the Service Desk Module
  - View operator record settings for Self Service users.
  - View operator record settings for Service Desk analysts.
  - Create operator records from operator templates.
  - Discuss environment record settings.
  - Discuss interaction tables and forms.
- Module 9: Configuring the Incident Management Module
  - Configure operator and profile settings.
  - Create a new assignment group.
  - Understand multi-level categorization.
  - Create new area and sub-area records.
  - Describe the alert and escalation process.
  - Describe interoperability with other SM applications.
  - Configure environment record settings.
  - Define the Incident Management tables and forms.
- Module 10: Configuring the Problem Management Module
  - Configure the environment records settings.
  - Configure the operator and profile settings.
  - Describe interoperability with other SM applications.
- Module 11: Configuring the Change Management Module
  - Configure the operator and profile settings.
  - Configure the environment record settings.
  - Describe interoperability with other SM applications.
  - Create a change category.
  - Create a phase definition record.
- Module 12: Configuring the Request Management Module
  - Identify the Request Management catalog.
  - Create and configure model/catalog record.
- Module 13: Configuring the Service Catalog Module
  - Add catalog items to the Service Catalog.
  - Add bundles of items to the Service Catalog.
  - Modify the Service Request Catalog (SRC) Web Client ordering wizard.
- Module 14: Configuring Knowledge Management
  - Identify knowledge management tasks.
  - Contribute a knowledge document.
  - Manage document views.
- Module 15: Configuring Service Level Agreements
  - Configure the Service Level Agreement catalog.
  - Describe the tasks needed to configure SLAs.
  - Understand how SLAs are linked to other applications.
- Module 16: Configuring Integrations
  - Describe the various methods to integrate with Service Manager.
  - Understand the Integration Manager utility.
  - Describe the steps required to integrate Release Control and Operations Orchestration with Service Manager

## Objectives

After completing this course, you should be able to do the following:

- Describe the role and intent for each of the Service Manager components.

- Understand the Service Manager processes, workflows, and best practices.
- Use the Service Manager Web and Windows Client, as well as the Employee Self Service portal.
- Navigate online help.
- Add permissions to applications for users.
- Define approvals and approval groups.
- Describe SM reporting capabilities.
- Understand CIs and CI Relationships.
- Manage Service Manager operators using administrative security tools.
- Configure operator, profile, role, environment, folder, and contact objects.
- Open a new interaction with Service Manager Service Desk, and then follow its escalation through Incident Management, Problem Management, and Change Management, utilizing the built-in ITIL standards and best practices.
- Configure the Service Manager components.
- Create new incident management categorizations: areas and subareas.
- Add new categories and phases.
- Describe the various integration technologies and how to integrate Service Manager to other products using the Integration Manager Utility

## How to register

Click on this link to register for this course: [Register for this course.](#)

## Policies, fees and cancellations

Course fees may vary and are established and collected by the training center delivering the course. Cancellation fees may apply. Contact your HP Authorized Training Partner for their respective policies.

## For more information

HP ExpertOne: [www.hp.com/go/ExpertOne-ContactUs](http://www.hp.com/go/ExpertOne-ContactUs)

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