



## Course Data Sheet

### SM350 – Service Manager 9.x Advanced

Course No.: SM350-94	Category/Sub Category: Service Manager
For software version(s): 9.40 Software version used in the labs: 9.40	Course length: 5 days
Delivery formats: Instructor Led (ILT) and Virtual Instructor Led (VILT)	Training is available as a private session onsite.
To order visit: <a href="#">Software Education</a>	
For a preview of this course, see: Trailer	

### Course Description

This class is targeted at system administrators and consultants responsible for configuring and tailoring Service Manager for a customer’s environment. The course focuses on the tools and utilities used to tailor a Service Manager system. The course is 50% lecture and 50% hands-on exercises.

This course is designed for users who are experienced with Service Manager, or have taken one of the level 100 courses (Technical Configuration or Foundations for Process Owners).

### Audience/Job Roles

Administrators, developers, and managers who are responsible for configuring and tailoring Service Manager.

### Course Objectives

Upon successful completion of this course, you should be able to:  
Plan for ALM implementation

- Use the Database Manager utility to add, modify, and delete records and to load and unload records
- Use the Database Dictionary utility to add fields and keys to tables
- Describe the Service Manager System Language and how it is used
- Use the Unload Script utility to unload data (for example, to migrate to another system)
- Use Data Policy to enforce data integrity at the table level
- Use Forms Designer to add and modify forms

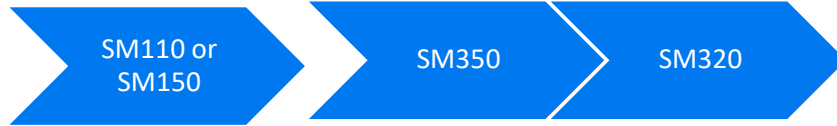
- Describe the functions of the System Definition utility and use the System Definition utility to add fields to an existing form
- Use the RAD Debugger to troubleshoot an application and display the value of variables
- Describe how JavaScript is used by the various Service Manager utilities
- Describe Dynamic View Dependencies
- Use the Global Lists utility to create and maintain dynamic and user-defined lists
- Describe the components of Process Designer
- Use Process Designer to build workflows, configure business rules, create task plans, and implement security
- Use the Format Control utility to implement business rules
- Use the Display Applications utility to modify buttons and drop-down menus
- Use Links to establish relationships between tables
- Create and configure views
- Describe how the To Do queue is populated and how application queues are configured
- Create menus and dashboards
- Describe the components of the Document Engine
- Create and modify wizards
- Describe how the alert and notification engines work
- Describe how to import and export data
- Use activity actions to audit and track changes to specific fields for open, update, and close activities

## Prerequisites/Recommended Skills

Any one of the following courses:

- SM150 – Service Manager 9.x Technical Configuration
- SM110 – Service Manager 9.x Foundations for Process Owners

## Learning Path



## Related Courses

- ALM350 – ALM 12.x Site and Project Administration
- ALM01IT – ALM 12.x Interactive Training Created by ART
- ALM370 – ALM Scripting

## Certification

## Course Topics

Modules	Objectives
<b>Module 1: Introduction to Service Manager</b>	<ul style="list-style-type: none"> <li>• Course Objectives</li> <li>• Class Schedule</li> <li>• Daily Schedule</li> <li>• Participants' introductions</li> <li>• Class Logistics</li> <li>• VILT Instructions</li> <li>• Virtual Lab Instructions</li> </ul>
<b>Module 2: Introducing Service Manager Utilities</b>	<ul style="list-style-type: none"> <li>• List the foundation knowledge components needed to use the Service Manager utilities</li> <li>• Describe the base utilities designed to edit records in tables and forms</li> <li>• Describe the utilities used to configure features of Service Manager, such as configuring notifications</li> </ul>
<b>Module 3: Managing Data</b>	<ul style="list-style-type: none"> <li>• Access the Database Manager utility</li> <li>• Use Database Manager to manage records in a table (add, updated, delete)</li> <li>• Use Database Manager to mass update records</li> <li>• Access the Database Dictionary utility</li> <li>• Add field names and keys to an existing table</li> <li>• Add a new table</li> <li>• Use keys to tune performance</li> <li>• Identify Service Manager data types and variables</li> <li>• Identify the role of current file variables in Service Manager applications</li> <li>• Identify operators that perform selected system operations</li> <li>• Identify the characteristics of functions and expressions</li> <li>• Access the Unload Script utility</li> <li>• Describe the features and uses of the Unload Script utility</li> </ul>
<b>Module 4: Introducing Data Policy</b>	<ul style="list-style-type: none"> <li>• Access the Data Policy option</li> <li>• Identify data policy rules</li> <li>• Modify a data policy record to filter data</li> <li>• Verify data policy changes</li> </ul>
<b>Module 5: Using Forms Designer</b>	<ul style="list-style-type: none"> <li>• Describe the functions of the Forms Designer</li> <li>• Add fields to an existing form</li> <li>• Create a new table using the Form wizard</li> <li>• Collapse sections</li> <li>• Convert existing tabs to collapsible sections</li> <li>• Describe the functions of the System Definition utility</li> <li>• Add fields to an existing form</li> </ul>
<b>Module 6: Implementation Tools</b>	<ul style="list-style-type: none"> <li>• Describe the purpose of the RAD Debugger</li> <li>• Identify how to display variables</li> <li>• Set and display values using the RAD Debugger</li> <li>• List basic JavaScript rules</li> <li>• Identify which Service Manager utilities use JavaScript</li> <li>• Identify the main features of the Script Library table</li> <li>• Describe the JavaScript syntax color codes</li> <li>• List additional resources for more information</li> </ul>

<b>Module 7: Understanding Dynamic View Dependencies</b>	<ul style="list-style-type: none"> <li>• Identify the condition properties for setting Dynamic View Dependencies (DVD) conditional statements</li> <li>• Specify the field comparisons, field value matching, and dynamic functions for a property</li> </ul>
<b>Module 8: Global Lists</b>	<ul style="list-style-type: none"> <li>• Create and display global lists</li> <li>• Access the Global Lists utility</li> <li>• Configure the Global Lists utility</li> <li>• Explain how global lists work</li> </ul>
<b>Module 9: Overview of Process Designer</b>	<ul style="list-style-type: none"> <li>• Describe the Process Designer components</li> <li>• Describe the two different Service Manager 9.4 modes (Classic and Codeless) and which Process Designer modules and components are included with each mode</li> <li>• Create workflows using the Workflow Designer</li> <li>• Use the Business Rules Editor to implement business logic</li> <li>• Use Format Control and Display Application to implement business logic</li> <li>• Describe the Process Designer Security Model</li> <li>• Use the Task Planner to create tasks</li> </ul>
<b>Module 10: Establishing Links</b>	<ul style="list-style-type: none"> <li>• Define links</li> <li>• Describe how links are used</li> <li>• Distinguish between simple and complex links</li> <li>• Restrict access to find and fill functions</li> <li>• Describe the relationship between pop-up hover forms and link records</li> <li>• Create virtual joins to display data from supporting tables</li> <li>• Identify the steps to configure a virtual join</li> <li>• Create a virtual join with a table object</li> </ul>
<b>Module 11: Modifying Queues and Views</b>	<ul style="list-style-type: none"> <li>• Define views</li> <li>• Create a view using the wizard</li> <li>• Create a view from a query</li> <li>• Identify the key components for views</li> <li>• Describe the features of the application queues</li> <li>• Describe where the object records define the default queues</li> <li>• Describe the relationship between the operator record profiles and query groups with the audience views</li> <li>• Describe how the default To Do queue works</li> <li>• Describe how the TodoMap populates data in the Todo table</li> <li>• Modify the TodoMap table</li> <li>• Modify the default Views for the To Do queue</li> </ul>
<b>Module 12: Working with Menus and Dashboards</b>	<ul style="list-style-type: none"> <li>• Describe the function of the Menu Manager utility</li> <li>• Modify the menu navigation within System Navigator</li> <li>• Describe how dashboards works</li> <li>• Summarize dashboard limitations</li> <li>• List the underlying components</li> </ul>

<b>Module 13: Navigating the Document Engine</b>	<ul style="list-style-type: none"> <li>• Navigate the Document Engine</li> <li>• Access the Document Engine</li> <li>• Describe Objects</li> <li>• Describe States</li> <li>• Describe Processes</li> </ul>
<b>Module 14: Introducing Wizards</b>	<ul style="list-style-type: none"> <li>• Describe the features and functions of wizards</li> <li>• Modify an existing wizard</li> <li>• Describe how wizards interact with Format Control</li> </ul>
<b>Module 15: Understanding Alerts and Notifications</b>	<ul style="list-style-type: none"> <li>• List the components of the Notification Engine</li> <li>• Describe how the notifications are invoked</li> <li>• Set up and modify notifications</li> <li>• List what variables are used and where they get defined</li> <li>• Describe how notifications are processed</li> <li>• Identify which Service Manager modules use alerts</li> <li>• List the components of the alert engine</li> <li>• Describe how the alerts are invoked</li> <li>• Describe how to configure and modify alerts</li> <li>• Describe how alerts are processed</li> </ul>
<b>Module 16: Integrating with the Import/Export Utilities</b>	<ul style="list-style-type: none"> <li>• Export data from Service Manager</li> <li>• Import data to Service Manager</li> </ul>
<b>Module 17: Application Auditing (Activity Actions)</b>	<ul style="list-style-type: none"> <li>• Identify the types of auditing used in Service Manager</li> <li>• Identify application and system fields used for auditing</li> <li>• Identify alternative auditing applications</li> <li>• Define an activity action</li> </ul>
<b>Module 18: Tips and Tricks</b>	<ul style="list-style-type: none"> <li>• Find the login connection history</li> <li>• Clear the command history</li> <li>• Search for and add commands</li> <li>• Access useful RAD routines</li> </ul>