SM240 - Service Manager 9.x Change Management Training

Instructor-Led Training
For versions 9.21 & 9.30

OVERVIEW

This course provides students with the skills needed to effectively use, configure, and customize the Change Management application. This course covers how to use Service Manager 9.30 software to effectively manage the Change Management application, customize and configure the Service Manager 9.30 software using advanced administrative tools, and apply ITIL-based Change Management processes to Service Manager 9.30. 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).

INTENDED AUDIENCE

- Administrators, developers, web developers, and managers who are responsible for configuring and tailoring the Service Manager Change Management component.

DURATION: 5 DAYS

SOFTWARE VERSIONS: 9.21 & 9.30

PREREQUISITES

Any one of the following courses:
- SM150-Service Manager 9.x: Technical Configuration
- SM110-Service Manager 9.x: Foundations for Process Owners

COURSE OBJECTIVES

At the end of the course, you will be able to:
- Describe how the Change Management process works
- Describe the Change Management application architecture
- Open, modify, approve, and close a change request
- Control access to change management processes using operator records, profiles, groups, and capability words
- Add change and task categories
- Configure approvals and approval groups
- Create alerts and notifications for changes
- Create customized actions, forms, rules, views, and templates
- Understand the Change Management Workflow is implemented using Process Designer
- Understand the Process Designer Security Model

RECOMMENDED FOLLOW-UP COURSES

- SM320-Service Manager 9.x: Administration
- SM350-Service Manager 9.x: Advanced

Agenda	**Course Logistics**
	• Course Logistics
	• Daily Schedule
	• VILT Instructions
	• Participants' Introductions
	• Virtual Lab Instructions
	• Course Objectives
	I. Change Management Overview
	• What is Change Management?
	• ITIL Workflows and Best Practices
	• Change Management Workflow
	• Components Overview
	• Change Management Architecture
	• Change Management Business Processes
	II. Tables and Forms
	• Tables
	• Forms
	III. Security and Access Control
	• Environment Records
	• Operator Records and Capability Words
	• Profile Records
	• Groups
	IV. Approvals
	• Approvals Processing
	• Approvals Setup and Maintenance
	V. Categories and Phases
	• Managing Existing Change Category and Phase Definition Records
	• Building Change Request Categories and Phase Definitions

Agenda (continued)	**VI. Alerts and Notifications** • Alerts and Alert Processing • Notifications • Macros **VII. Tailoring Utilities** • Data Validation • Display Options • Format Control • Links • Scripts **VIII. Change Calendar** • Change Calendar Overview • Installation and Configuration • Using the Change Calendar **IX. Process Designer** • Components of Process Designer • Using Process Designer • Process Designer Security Model • Managing Workflows **X. Using HP Release Control[1]** • Release Control architecture • Understanding relationships between Release Control and Change Management • Track all changes in a single view • Understand impact analysis • Understand collision detection • Understand risk analysis • Understand time periods • Understand similar changes [1]Delivered as hosted, simulation-based training using HP's Adoption Readiness Tool (ART). ART provides simulation-based learning for a highly interactive experience. Users will be able to move through the module in a linear fashion, or jump quickly to an area of particular interest. Users will be provided with a link and login credentials to access this training.