

VMware Service Manager: Managing Requests & Tasks

Delivery Methods

- Instructor-led training
- Live-online
- Onsite training

Course Duration

- One (1) day

Maximum Students

- Eight (8)

Target Audience

- Change Managers
- Change Operatives
- System Administrators
- Service Desk Managers

Prerequisites

An understanding of change management responsibilities and basic knowledge of ITIL fundamentals would be beneficial.

Pricing

Contact your VMware representative or a VMware Authorized Training Center for pricing information.

More Information

Courses are conveniently scheduled around the world. Please visit <http://www.vmware.com/education> to find the class that is right for you.

Onsite training is also available for customers who prefer to bring a VMware Certified Instructor to their own facilities. For additional information about onsite classes, including facility requirements, contact education@vmware.com

Course Overview

Within VMware Service Manager (VSM) workflow management, Managing Requests and Tasks focuses on the responsibilities of the request manager and task assignee.

This one-day course covers the generation, action and management of change requests and tasks within requests.

What You Will Learn

- Fundamentals of VMware Service Manager and workflow management
- The nature of the workflow interface
- How to create a request
- How to action tasks
- How to amend live requests
- How to use request and task explorer links
- An understanding of other related request and task features
- How to manage request and tasks
- How to record time in the timesheeting module
- How to use the request and task search functions
- An understanding of the workflow management reporting options
- How to use the internal communications options

How You Will Benefit

After completing this course, students will be able to raise requests, action tasks and approvals and manage their responsibilities within the change management process. Students will receive a full course manual for future reference.

Course Modules

1	Introducing VMware Service Manager <ul style="list-style-type: none">• Introduction to VMware Service Manager• Workflow Management overview• Launching Ionix Service Manager and Logging in• Introduction to the Interface• The Banner and Menu Bar• The Main Toolbar• Screen Toolbars• Managing Multiple Screens	8	Managing Request and Tasks <ul style="list-style-type: none">• Requests and Tasks Outstanding• Requests Outstanding• Tasks Outstanding• Request and Task Delegation• Workload• Personalizing your views• Add Notes• Exporting Results• Convert a Request to a Template
2	The Workflow Interface <ul style="list-style-type: none">• Request Window• Information Panel• The Request Explorer (Links)• Request Details Area• Linked CIs and Services Area• The Lower Window• Request (and Task) Details Screen Features• Request History	9	Timesheet <ul style="list-style-type: none">• Recording Time, Action and Expenses• Create a Timesheet Entry
3	Creating Requests <ul style="list-style-type: none">• Creating a Request• Authorization• Linking CMDB Entities• Impact Analysis• Actions Field• Actioning a Request	10	Searching <ul style="list-style-type: none">• Searching using the Query Button• Perform a Full Search• Graphing Results
4	Actioning Tasks <ul style="list-style-type: none">• Opening Tasks• Statuses of Tasks and Approvals• Task and Approval Details Window• Actioning Tasks	11	Reporting <ul style="list-style-type: none">• Standard Reporting• Save Reports• Scheduling Reports
5	Amending Requests <ul style="list-style-type: none">• Edit Dependencies• Workflow Dates	12	Internal Communication <ul style="list-style-type: none">• Bulletin Board• Internal Messaging• Automatic Emails• Accessing Mail Message Access



6 Request and Task Explorer Links

- Attaching Objects
- Uploading Objects
- Forms
- Events/ Inbound Actions
- Transactions
- Performing Transactions from a Request Details CI Query Field
- Change Windows
- Outages
- MS Project
- Gantt Chart
- Knowledge

13 Appendices

- Appendix A - Explorer Options

7 Other Request and Task Features

- SLM
- Email
- Letter
- Scheduling Requests
- Gantt Chart
- Quick Launch
- Linking Requests and Calls

About VMware Education Services

VMware Education Services provides industry-leading technical training and certification programs that build and recognize the virtualization knowledge and expertise needed by technical professionals to transform their IT organizations and realize the full value of IT as a Service.

