

Infra Course Outline

Workflow Administration



Infra Workflow Management is a Change Management tool for managing and controlling changes within your organization.

In this one day course, you will learn how to administer the Workflow Management side of Infra.

What You Will Learn

- How to navigate the system administration interface
- An understanding of system settings and how they affect Workflow Management within Infra
- How to create workflow groups
- How to create new officers manually and from templates
- How to create, assign and update permissions in officer roles
- How to configure global Workflow Management settings
- How to define key fields in Workflow Management
- An understanding of other system administration settings, including editing email templates
- How to use custom request details screens to control what information is logged
- How to create change calendars and change windows



How You Will Benefit

On completion of this course, students will be able to configure Infra Workflow Management. A full course manual is provided with the course which students can take back to the workplace and use as a future reference source.

Length of Course: 1 day

Maximum Students: 8 Students

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Workflow Administration

Course Topics

Module 1: Infra Administration

- Administrator login
- Administration interface
- The Explorer menu
- The Main Toolbar
- Administration modifications
 - ✦ Stop logins
 - ✦ Log out all officers
- Launching Infra and logging in
- Designing your implementation

Module 2: Workflow Management Settings

- Configuring the global Workflow Management settings

Module 3: Workflow and Approval Groups

- Introducing Workflow groups
- Creating workflow groups
- Workflow groups versus Approval groups

Module 4: Officer Roles

- Security roles overview
- Default groups
- General Access role
- Workflow Management role
- Configuration Management role
- Service Level Management role
- Reporting role
- Availability role
- Knowledge Management role
- Bulletin board role

Module 5: Adding and Updating Officers

- Adding new officers
- Officer details
- Officer templates
- Standard configurations
- Automating officer management with Directory Integration

Module 6: Defining Key Fields

- Request key fields discussed
 - ✦ Request types
 - ✦ Priority
 - ✦ Risk
 - ✦ Implementation profiles
 - ✦ Implementation states
- Task key field discussed
 - ✦ Task types
 - ✦ Task phases
 - ✦ Task status titles
 - ✦ Task actions
 - ✦ Request status on completion
- Example configurations

Module 7: Request Workflow

- Define key processes
- Creating custom request, task and approval screens
- Forms, attributes and extensions
- Notifying request stakeholders

Module 8: Partitioning

- Partitioning overview
- Configuring partitions
- Change and administer partitions
- Request and task forwarding rules

Module 9: Time Zoning

- Setting up time zones

Module 10: Configuring Workflow Management

- Approval types
- Request action types
- Request CMDB profiles
- Request CI link profiles
- Request custom profiles 1 & 2
- Request extension profiles
- Request implementation profiles
- Request implementation states

- Request link types
- Request physical statuses
- Request priority Request risks
- Request completion statuses
- Request types
- Task action types
- Task custom profiles 1 & 2
- Task entity types
- Task extension profiles
- Task physical statuses
- Task priority
- Task status titles
- Task types
- Workflow Management history types
- Workflow processes
- Request stakeholder types

Module 11: Other Administration Settings

- System options
- System settings
- Security profiles
- Server time zone
- Hours definition
- Public holiday definition
- Reset references
- Browse limits
- Messaging
- Email template designer
- Email settings
- Activity log
- System diagnostics
- System titles
- Security settings
- Customer portal settings and roles
- Question mapping

Module 11: Change Calendar Administration

- Change calendar overview
- Change calendar administration
- Creating new change calendars