

# VMware Service Manager: Workflow Manager Upgrade

## Delivery Methods

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

## Course Duration

- One-half day

## Maximum Students

- Eight (8)

## Target Audience

- Workflow Administrators

## Starting Skill Level

- Familiarity with the VMware Service Manager interface and functions
- No HTML or coding skills are required

## Prerequisites

Change Administrator – Version 7.0.3

## 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](mailto:education@vmware.com)

## Course Overview

VMware Service Manager introduces new functionality to the Workflow Module.

This half-day course is suitable for Workflow administrators who have a good understanding of VMware Service Manager 8.0 and are migrating to VMware Service Manager 9.

## What You Will Learn

- New searchable CMDB items
- How to consolidate Officer and Customer records
- How to use collapsible screen sections
- How to use HTML edits built into text fields
- How to use the Workflow Dependency Diagram and Workflow pallet, which have been redesigned with a grid and 3D appearance
- How to assign tasks and approvals to multiple recipients
- New options for setting the re-assignment of tasks when a task is automatically reopened within a workflow
- New Manage CMDB and Outbound Action tasks
- How to add search criteria to the search screen
- How to delegate work to nominated persons

## How You Will Benefit

After completing this course, you will be able to use the new features of Administration for Workflow Management in VMware Service Manager 8.0. You will receive a full course manual that you can take back to the workplace and use as a future reference source.

## Course Modules

<b>1 New Features</b> <ul style="list-style-type: none"><li>• Summary of Changes</li></ul>	<b>5 Asset Management</b> <ul style="list-style-type: none"><li>• Performing Transactions<ul style="list-style-type: none"><li>• From a Request Details Query field</li><li>• From a CMDB Query Field</li><li>• From the Customer Query Field</li><li>• From the Service Query Field</li><li>• From the Transaction Explorer Link</li></ul></li></ul>
<b>2 VMware Service Manager Interface</b> <ul style="list-style-type: none"><li>• New Menu</li><li>• Create a New Person Customer Record</li><li>• Search Menu</li><li>• Tools Menu</li><li>• Admin Menu</li><li>• Window Menu</li><li>• Help Menu</li><li>• Quick Search</li></ul>	<b>6 Delegation</b> <ul style="list-style-type: none"><li>• Set up own Delegates as an Officer</li><li>• Managing Delegated Items<ul style="list-style-type: none"><li>• Delegated Requests/Task Views</li></ul></li></ul>
<b>3 Changes to the Request Screen</b> <ul style="list-style-type: none"><li>• Request Details<ul style="list-style-type: none"><li>• Query Fields</li><li>• Free Text Fields</li><li>• Information Panel</li></ul></li><li>• Request Explorer(Links)<ul style="list-style-type: none"><li>• Indicator</li><li>• Details</li><li>• Data</li><li>• Workflow</li><li>• Service Level management Alerts</li><li>• Contracts</li></ul></li></ul>	<b>7 Request and Task Search Screens</b> <ul style="list-style-type: none"><li>• New Request Search Screen</li><li>• Customize the Request Search Screen</li><li>• Using Request Search Criteria</li><li>• Viewing Forward Schedule of Change (FSC)</li><li>• Viewing the FSC from the VSM Service Portal</li><li>• Graphing the Request Search Results</li></ul>
<b>4 Workflow Pallet &amp; Templates</b> <ul style="list-style-type: none"><li>• Workflow Template Administration</li><li>• Task Dependencies</li><li>• Actioning Tasks</li><li>• New tasks<ul style="list-style-type: none"><li>• Manage CMDB Task</li><li>• Outbound Action Task</li></ul></li><li>• Changes to existing Tasks<ul style="list-style-type: none"><li>• SLM Start and Stop tasks</li><li>• Activation Task</li><li>• Approvals-recursive Paths</li></ul></li></ul>	<b>8 VMware Service Portal New Features</b> <ul style="list-style-type: none"><li>• New look and feel</li><li>• Browsing the Service Catalogue</li><li>• Submitting a Service Order</li><li>• Reviewing Service Orders</li><li>• Delegation Service Portal</li><li>• Delegate Setup</li><li>• Viewing Delegated Approvals</li></ul>

## 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.