

# Infra Course Outline

## Managing Requests and Tasks



Infra is a workflow process management tool for managing and controlling changes within your organization. In this one day course, change managers, project managers and quality managers will learn how to manage and create change requests using Infra Workflow Management.

### What You Will Learn

- How to configure the Infra interface
- How requests work in Infra
- How to create a new request from a template
- How to action and authorize requests
- How to attach files to a request
- How to manage outstanding requests, tasks and approvals
- How to action and complete tasks and approvals
- How to link requests to calls
- How to search for requests in Infra
- How to create reports on requests
- How to use the bulletin board to send updates or emails



### How You Will Benefit

On completion of this course, students will be able to raise requests and action tasks and approvals upon their return to work. 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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### Course Topics

#### Module 1: Introducing Infra

- Introduction to Infra
- Change overview
- Understanding process workflow basics
  - ✦ Workflow options
  - ✦ Responsibilities
- Launching Infra and logging in
- Introduction to the interface
- Customizing the toolbar
- Shortcuts
- Managing multiple windows
- Exiting Infra

#### Module 2: The Workflow Interface

- Request details window
- Request explorer
- The lower window
- Request history
- SLM alerts
- Task and approval details window

#### Module 3: Creating Requests

- Creating a request
- Authorization
- The QD button
- Linking CMDB entities
- Impact analysis
- Actions field
- Actioning a request
  - ✦ Forward a request
  - ✦ Defer a request
  - ✦ Save a request
  - ✦ Complete a request
  - ✦ Cancel a request

#### Module 4: Actioning Tasks

- Opening tasks
- Statuses of tasks and approvals
- Task and approval details window
- Actioning tasks
  - ✦ Forwarding internally
  - ✦ Forwarding externally
  - ✦ Defer tasks
  - ✦ Complete a task
  - ✦ Complete an approval

#### Module 5: Amending Requests

- Edit dependencies
  - ✦ Adding a task
  - ✦ Adding an approval
  - ✦ Changing links
  - ✦ Activate / deactivate tasks
  - ✦ Reassign tasks and approvals
- Workflow dates

#### Module 6: Requests and Task Data Options

- Attaching objects
- Attributes
- Forms
- Extensions

#### Module 7: Other Request and Task Features

- SLM
- Email
- Letter
- Submission forms
- Change windows
- Outages
- Export to MS Project
- Scheduling requests
- Gantt chart view
- Linking requests and calls

#### Module 8: Managing Requests and Tasks

- Workload
- Requests and tasks outstanding
- Personalizing your view
- Exporting results
- Adding a note to a request or task
- Applying templates to requests
- Converting requests to templates

#### Module 9: Timesheet

- Recording time, action and expenses
- Adding a timesheet entry
  - ✦ Time and budgets

#### Module 10: Searching

- Searching using the QD button
- Perform a full search
- Graphing results
- Saving a search

#### Module 11: Reporting

- Standard reporting
  - ✦ Report types
  - ✦ Selection criteria
- Saving reports
- Schedule reports

#### Module 12: Internal Communication

- Viewing the bulletin board
- Creating a bulletin
- Internal messaging
  - ✦ Receiving and deleting internal messages
- Automatic emails
- Accessing mail message access

#### Licensed Modules

- Object version control