

# Infra Course Outline

## Workflow Template Design



Within Infra Workflow Management, Workflow Template Design focuses on the creation of the templates from which all requests for change are generated. This full day course covers the complete workflow palette, thereby allowing change managers to create workflow templates for any process in their organization.

### What You Will Learn

- Introduction to Infra
- Understanding of change responsibilities and workflow basics
- How the workflow interface is made up
- Understanding change managers and templates
- How to create, modify, clone and delete a template
- How to create a workflow process – adding tasks and defining task dependency
- How to set request status, dates and budgets
- Assignment and authorization of templates
- Documenting templates
- How to use the full workflow palette
- How to use conditional branching
- How to use shared data fields
- How to create and apply component workflows



### How You Will Benefit

On completion of this course, students will be able to create and administer workflow templates containing both simple and complex mapped processes. 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 Template Design

### 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 Templates

- Change Managers and templates
- Creating a template
  - ❖ Deleting a template
  - ❖ Modifying a template
  - ❖ Renaming a template
  - ❖ Cloning a template
- Creating a workflow
  - ❖ Workflow palette
- Adding tasks and approvals
- Creating dependencies
  - ❖ Dependency diagram options
- Creating tasks in a template
  - ❖ Setting request status on completion
  - ❖ Setting or changing dates in a task
  - ❖ Setting budgets
- Delay task
- Activation task
- Assigning templates to Request Managers
- Pre-authorizing templates
- Documenting templates

#### Module 4: Conditional Branching

- Introduction to conditional branching
- Adding a conditional branching task
  - ❖ Rules
  - ❖ Applying multiple dependency rules
  - ❖ Creating a new condition
  - ❖ Creating a new action
  - ❖ Using the rule builder

#### Module 5: Shared Data Fields

- Introduction to shared data fields
  - ❖ Profiles
  - ❖ Field names
  - ❖ Data transfer
- Conditional branching accessing shared data

#### Module 6: Other Tasks

- Messaging task
- Update CMDB task
- Create request task
- Customer approval task
- Closure task
- Define change window task details
- Run external procedure task
- External supplier task
- Link CMDB item task
- SLM task

#### Module 7: Component Workflows

- Creating component workflows

#### Appendix A: The Task Palette

#### Optional Module:

Request Submission Designer