

# VMware Service Manager: Workflow Administrator Upgrade

## Delivery Methods

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

## Course Duration

- One-half day

## Maximum Students

- Eight (8)

## Target Audience

- Change Managers
- System Administrators

## Prerequisites

Infra v8.0 Workflow Administrator

## 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

The Workflow Administrator Upgrade covers the administration of new features and functionality available in, and related to, the workflow management module of VMware Service Manager v9.0.

This half-day course is suitable for workflow administrators who have a good understanding of Infra v8.0 and are migrating to VMware Service Manager v9.0.

## What You Will Learn

- An overview of the new features in VMware Service Manager v9.0
- Changes to logging in, the SM interface, the administration menu, Help and the system administration explorer
- Changes to the System section in administration
- Changes to the Security section in administration
- Changes to the Security roles section in administration
- Changes to the Workflow Management section in administration
- Changes to officer management
- Changes to messaging
- Changes to the portal
- How to administer and setup officer delegation
- How to configure proactive problem management
- Changes to scripting
- How to use the Configuration Portability function

## How You Will Benefit

After completing the course, students will understand the new administration options and be able to configure the VMware Service Manager v9.0 workflow management module and related functions. Students will receive a full course manual for future reference.

## Course Modules

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| <p><b>1 Version 9.0 New Features</b></p> <ul style="list-style-type: none"> <li>• Summary of Changes</li> <li>• Licensing</li> </ul>  | <p><b>8 Changes to Messaging</b></p> <ul style="list-style-type: none"> <li>• Summary of Changes to Messaging</li> <li>• Define Messaging Settings</li> <li>• Changes to the Editing of Email Message Templates</li> <li>• Changes to the Message Type Map</li> <li>• Changes to Email Settings</li> </ul> |
| <p><b>2 Overview of Changes to System Administration and the Interface</b></p> <ul style="list-style-type: none"> <li>• Summary of Changes</li> <li>• Changes to the Login and SM Interface</li> <li>• Changes to the Administration and Help Menus</li> <li>• Changes to the System Administration Explorer</li> <li>• Screen Toolbars in System Administration</li> </ul>   | <p><b>9 Changes to the Portal</b></p> <ul style="list-style-type: none"> <li>• Summary of Changes to the Portal</li> <li>• Configure Portal Settings</li> <li>• Changes to Customer Portal Roles</li> </ul>  |
| <p><b>3 Changes to System Section</b></p> <ul style="list-style-type: none"> <li>• Summary of Changes to the System Section</li> <li>• Your Organization</li> <li>• Partition Settings</li> <li>• System Settings</li> <li>• Browse Limits</li> <li>• Activity Log</li> <li>• System Titles</li> <li>• Auditing</li> </ul>  | <p><b>10 Delegation Setup</b></p> <ul style="list-style-type: none"> <li>• Delegation Overview</li> <li>• Delegation Features</li> <li>• Administration Setup</li> <li>• Setting up Officer Delegation with Officer and Customer Delegates</li> </ul>  |
| <p><b>4 Changes to Security Section</b></p> <ul style="list-style-type: none"> <li>• Summary of Changes to the Security Section</li> <li>• Security Settings</li> <li>• Workflow Management Groups</li> <li>• Login Control</li> </ul>  | <p><b>12 Proactive Analysis</b></p> <ul style="list-style-type: none"> <li>• Proactive Problem Management Overview</li> <li>• Administration Setup</li> <li>• Configuring the Proactive Analysis Tool</li> <li>• Search Proactive Requests</li> </ul>  |
| <p><b>5 Changes to Security Roles Section</b></p> <ul style="list-style-type: none"> <li>• Summary of Changes to the Security Roles Section</li> <li>• Changes to the Security Roles Interface</li> <li>• General Access Security Role</li> <li>• Workflow Management Security Role</li> </ul>  | <p><b>13 Configuration Portability</b></p> <ul style="list-style-type: none"> <li>• Configuration Portability Overview</li> <li>• Administrative Setup</li> <li>• Creating new Configuration Settings</li> <li>• Exporting &amp; Importing Configuration Settings</li> </ul>                               |
| <p><b>6 Changes to Workflow Management Section</b></p> <ul style="list-style-type: none"> <li>• Summary of Changes to Workflow Management Section</li> <li>• Workflow Management Settings</li> <li>• Request Custom Profiles 1-4</li> <li>• Request Screen Set</li> <li>• Request Stakeholder Roles</li> <li>• Task Custom Profiles 1-4</li> <li>• Task and Approval Screen Sets</li> <li>• Customer Approval Task Screen Set</li> <li>• Closure Task Screen Set</li> <li>• External Supplier Task Screen Set</li> <li>• Workflow Management History Types</li> </ul> | <p><b>Additional Information</b></p> <ul style="list-style-type: none"> <li>• Changes to the Server Console</li> <li>• Disable Partitioning</li> <li>• List of workshop Challenges</li> </ul>  |
| <p><b>7 Changes to Officer Management</b></p> <ul style="list-style-type: none"> <li>• Order of Implementation</li> <li>• Adding New Officers</li> <li>• Managing Officers</li> <li>• Officer Details</li> <li>• Standard Configurations</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.



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