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IBM OpenPages Administration (V7.0)  
Information

**Length:** 3.0 Days  
**Ref:** 1O201G-X  
**Delivery method:** Classroom  
**Price:** EUR

Overview

IBM OpenPages: Administration (V7.0) is a 3 day instructor-led course or self-paced virtual course in which IBM OpenPages application administrators learn how to administer key areas of the IBM OpenPages environment.

Public

This intermediate course is for those who will perform application administration tasks in the IBM OpenPages GRC Platform.

Prerequisites

You should have:

- Completed IBM OpenPages: Core Team Fundamentals (V7.0)
- Experience using basic Windows **and** browser functionality

Objective

Please refer to course overview for description information.

Topics

Module 1 - Introduction to Configuration Topics

- Object types
- Field groups and definitions
- Field dependency and dependent picklists
- Object type filters
- Facts and dimensions
- Role-based and object-type configurations
- Home page tab and My work tab configurations

## Module 2 - Security Overview

- Folder based and record level security
- Security domains and context points
- Folder structures and location
- Record associations
- Hierarchical security concepts

## Module 3 - Adding and Managing Users and Groups

- User management interface
- New group and new user addition, enablement, disablement
- Passwords
- Administrator and group administrator account creation

## Module 4 - Adding and Managing Role Templates

- Role access control settings
- Role permissions
- Default role reports

## Module 5 - Adding Profiles

- Profiles review
- Default and Fallback profiles

## Module 6 - Managing Security

- Security domain administration
- Organizational group administration
- Default security reports

## Module 7 - Adding and Managing Field Groups

- Adding a field group
- Including a field group in an object type
- Sharing a field group among multiple object types

## Module 8 - Adding and Managing Field Definitions

- Data type review
- Methods for required field settings
- Field definition and group review
- Field definition permissions (read only)

## Module 9 - Creating Field Dependencies

- Field behavior definitions (visible, editable, required)
- Dependent fields use case
- Creating and disabling field dependencies

## Module 10 - Creating Dependent Picklists

- Dependent picklists use case
- Creating and disabling dependent picklists

## Module 11 - Creating Object Type Filters

- Object type filter use case for filtered list view
- Object type filter use case for home page tab
- Creating object type filters

## Module 12 - Configuring Overviews

- Object type overview use case
- Configuring overviews
- Enabling and disabling overviews

## Module 13 - Configuring Filtered List Views

- Filtered list views use case
- Configuring filtered list views of object types
- Setting filtered list view as default for object type
- Filtering on all fields in profile
- Explaining "Show all Objects"

## Module 14 - Configuring Folder Views

- Folder view use case
- Configuring folder view of object type

## Module 15 - Configuring Context Views

- Context view use case
- Configuring context view of object type

## Module 16 - Configuring List Views

- List view use case

- Configuring list view of object type

## Module 17 - Configuring Detail Views

- Spanning columns
- Using sections
- Setting field permissions (read only)
- Configuring "save as draft" options

## Module 18 - Configuring Activity Views

- Activity views use case
- Configuring activity views
- Enabling and disabling activity views
- Setting activity view defaults for object type
- Configuring "save as draft" options

## Module 19 - Configuring Grid Views

### Grid view use case

- Configuring grid views

## Module 20 - Object Type Security Rules

- Object type security rules use case
- Adding object type security rules

## Module 21 - Managing Field Guidance

- Defining field guidance and default behavior
- Defining system generated field guidance and default behavior
- Modifying field guidance

## Module 22 - Managing Object Type Labels and Menus

- Differences between Name and Label
- Changing Label by locale
- Types of menus in user interface
- Menus display and contents
- Changing the order of menus
- Configuring contents of menus and sub-menus

## Module 23 - Managing Home Page Tabs

- Reviewing My Work tab and reporting tabs home page
- Home page configuration use case
- My Work tab configuration and display
- Adding home page reporting tab
- Displaying order of home page tabs
- Re-labeling home page tabs
- Re-labeling filter lists in My Work tab

## Module 24 - Moving Records

- Moving records use case
- Moving records from parent to parent
- Cautions and consequences of moving records
- Unique move behavior of self-contained object types

## Module 25 - Environment Migration

- Defining environment migration
- Performing environment migration

## Module 26 - Currencies and Exchange Rates

- Base and localized currencies
- Adding currencies
- Adding and updating exchange rates

## Module 27 - Process Visualization

- Data input, output, and process diagram object type records
- Process analysis report
- Process visualization used case
- Creating and migrating a process visualization

## Module 28 - RCSA Preferences

- Defining preferences and preference group object types
- Use of preferences
- Configuration differences between qualitative and quantitative risk settings
- Limitations for preferences
- Preferences use case

## Module 29 - Creating a Survey

- Defining a custom form survey
- Creating a survey
- Limitations and alternatives for surveys
- Survey use case

## Module 30 - Maintaining Report Functions

- Defining recursive object types
- Reporting namespace
- Triangle relationships
- Recursive object levels
- Object type dimensions
- Facts and dimensions
- Revalidating reports
- Reporting schema and generated reporting framework
- Adding reports to reporting menu
- User access to IBM Cognos Connection and Studios
- Applying security to reporting menu

## Module 31 - Using FastMap

- Export to Excel, FastMap Import, FastMap Status
- FastMap templates and workbooks
- Troubleshoot FastMap import errors
- Best practices in using FastMap workbooks

## Module 32 - Using AURA

- Purpose of AURA
- AURA worksheets and workbook
- Best practices in using AURA workbooks

## Module 33 - Using AFCON

- Purpose of AFCON
- Expectations for the implementation team
- Overview of workbook, object-type and non-object type worksheet