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IBM OpenPages: Core Team Fundamentals (V7.0)
Information

Length: 1.0 Day
__Ref: 1O205G-X
Delivery method: Classroom
Price: EUR

Overview

IBM OpenPages: Core Team Fundamentals (V7.0) is a 1 day instructor-led course that teaches core team members the basics of the GRC Platform system. They will learn about the GRC Platform parlance and security, how users, groups and profiles are defined, how to navigate the GRC Platform, how to work with records and design topics. They will learn about using AFCON, configuring the home page, defining views, configuring field dependencies and dependent picklists, and setting record level security.

Public

This intermediate course is intended for customer implementation core team members and IBM OpenPages application administrators.

Prerequisites

You should have experience using basic Windows, browser, and Excel functionality.

No IBM OpenPages experience is required.

Objective

Please refer to Course Overview for description information.

Topics

Module 1 - Fundamentals

- Object Types
- Records and Fields
- Parent-Child Associations
- Business Hierarchies
- Using a Library
- Triggers, Helpers, and Utilities

Module 2 - Security Overview

- Security Domains
- Folder Structures
- Folder Location
- Record Associations

Module 3 - User Groups, Roles, and Profiles

- Users and Groups
- Role Templates
- Profiles
- Defining the User Experience

Module 4 - Navigation

- Record organization in IBM OpenPages
- Navigation of IBM OpenPages GRC Platform using home page, overview, and filtered list views
- Record's Detail Page
- Navigation from record to associated records

Module 5 - Working with Records

- Explanation of field types in details page
- Adding information to GRC Platform: adding new records, copying records, associating records to parent records
- Editing records in a detail view
- Using field guidance
- Using visualizations
- Explaining activity views: three-pane layout, editing fields, adding records, saving changes
- Explaining grid views: three-level layout, editing fields, using bulk update
- Explaining how to make personal changes to views
- Understanding primary associations
- Identifying administrator actions
- Understanding locking and un-locking records
- Viewing a record's change history
- Exporting records to Excel

Module 6 - Design Topics

- Field dependencies
- Dependent picklists
- Views: detail, activity, filtered list, grid

- Home Page
- Object type security rules

Module 7 - AFCON Overview

- Purpose of AFCON
- Expectations for implementation team
- Overview of workbook
- Object type worksheet overview
- Non-object type worksheet overviews