Education Services
KANA Enterprise Training Brochure

Contents

Introducing VERINT Education Services

VERINT Education Services offer comprehensive training in the KANA Enterprise product. With over 20 years' experience delivering learning solutions and transferring knowledge to our clients worldwide, we are in a unique position to offer guidance and advice on building a training program that best suits your distinct training requirements. Our classes are highly interactive, they include real life scenarios which allow students to complete tasks that they will be responsible for in the workplace. Training is delivered by highly professional instructors with many years' experience in the VERINT products. In addition to our generic courses we also customize training content and delivery style to suit your needs, whether it is formal training, group workshops, or individual coaching. VERINT's approach to education is flexible and will increase your return on investment in training, both financially and with the knowledge and skill levels acquired by delegates.

About This Brochure

This brochure provides a description of the KANA Enterprise courses available, including the objectives of each, their recommended audience, and the training delivery methods available.

The following sections are included:

- Learning Channels: Describes the various learning channels that we support.
- Course Library: Describes the courses.

Contact Us

We ask you to use this brochure as an introduction to what we can offer. Please contact us to discuss your requirements further. Our aim is to provide you with the right training experience to ensure you get the best from your VERINT solution.

Call us on: +44 (0)2890 788582 | **Email us on:** training.request@verint.com

Find out more about our services @ http://elearning.kana.com

We look forward to working with you.

VERINT Learning Channels

We recognize that people learn in different ways and at a different pace. Some individuals like a classroom environment whilst others do well with self-paced methods. Consequently we support a range of delivery methods including: traditional Instructor-Led Training (ILT), Virtual Classrooms (delivered via on-line training facilities), and Supported eLearning. We also offer “blended learning” programs, mixing classroom based Instructor Led Training (ILT) with Supported eLearning.

We have created a learning environment in which students are given the opportunity to successfully develop new skills and build on existing ones. The end result is customers who are highly skilled and competent in the VERINT products thereby allowing them to own their solutions and be self-sufficient as business requirements change.

VERINT Instructor Led Training (ILT)

Instructor Led Training (ILT) is classroom based and led by a certified VERINT trainer. Our classes include a well balanced mix of formal presentation of concepts, product demonstration, and Q&A sessions, plus ample opportunity for hands-on practice and case studies to reinforce the students learning. Each student receives a copy of the course concepts manual, hands-on exercise manual, screen casts (i.e. videos) of relevant product demonstrations, and other supporting materials such as reference guides.

ILT can be delivered on-site, virtually over the web or via Open Enrolment at one of our training centers.

On-Site Classes

We can come to your offices and provide dedicated training classes for your organization. A key benefit of on-site training is that we can focus on your implementation and the specific requirements of your system. It gives us the opportunity to work with you to modify the agenda to meet your specific needs. We can also provide dedicated training for your organization at one of our training centers listed below.

Open enrolment Classes

Open Enrolment classes are available to all VERINT customers. These are focused sessions away from the interruptions of the office, and provide a great opportunity to share ideas with fellow VERINT users. Our schedule includes our most popular classes; they are delivered at VERINT training centers in the US and the UK:

- Alpharetta, Atlanta, US
- Chicago, Illinios, US
- Overland Park, Kansas, US
- Santa Clara, California, US
- Belfast, N. Ireland, UK
- Glasgow, Scotland, UK
- Weybridge, England, UK

Virtual Classroom

VERINT Virtual Classroom is distance learning taught LIVE over the web using interactive web and audio conferencing tools. You will train with the same instructors who deliver our onsite and open enrolment classes, use the same high quality content, and receive access to the same practice labs. During the session you can interact with other students and the instructor by asking questions on the phone or by typing in questions through an online ‘chat’ feature. Audio is provided by using voice over IP headsets or by standard conference call.

VERINT Supported eLearning

The KANA Enterprise Supported eLearning curriculum accommodates multiple learning styles and preferences. Our eLearning courses encourage reflective practice and allow delegates to progress at their own pace providing a more personalized learning experience which increases the level of knowledge retention.

KANA Enterprise Supported eLearning modules consist of mixed format material for delegates to interact with. The majority of the material consists of videos or screen casts, which are supported with documentation, tutorials and hands-on practice.

Support from VERINT trainers is provided with the eLearning curriculum; trainers are available to guide and assist as required. Progress is assessed through lab solution reviews and Q&A sessions at specific points in the training.

eLearning Training Environment

A pre-configured training environment will be made available enabling the student to work through the training scenarios in a safe “sand box” environment.

The training environment is configured to include the components required for students to complete the eLearning modules.

Course Library – Instructor Led Training

We offer Instructor Led Training courses on the application desktops which provide an in-depth training on the functionality available with the Agent, Knowledge Authoring, Knowledge Admin and Functional Admin Desktops. This training is essential for individuals with one of the following roles:

- Contact Center Agents or Supervisors
- Knowledge Content Author or Manager
- Knowledge Administrator
- Business Administrator

Our ILT courses provide a detailed explanation of concepts and extensive hands-on practice with the Agent, Knowledge and Admin Desktops.

KANA Enterprise Agent Desktop

Pre-requisites: None.

Audience: KANA Enterprise Agents / Contact Centre Agents / Supervisors

Course Objective

In this course you will explore the functionality and features available to Agents when dealing with customer interactions / contacts, searching for knowledge and working with cases.

Duration

1 day

Course Topics

- An Introduction to KANA Enterprise – an overview of the product, its purpose and the features it provides to a Customer Service Agent.
- An Overview of Agent Journeys – an explanation of some of the important terms and concepts within the product and several illustrations of dealing with customer interactions using the application.
- Agent Home – an exploration of the Agent Home screen and the functionality it provides. This includes logging into the application, setting your status and navigating the application.
- Managing Customers – hands on exploration of the steps required to manage customer records within the system and view their contact / case history.
- Customer Contacts – in this section we explore the features available when dealing with customer enquires via the telephony, email, whitemail, chat and social channels.
- Knowledge Management – searching for knowledge to resolve customer enquiries and an explanation of Knowledge Infused Processes.
- Working on Cases – creating cases based on customer service requests, updating customers on the status of a case and completing basic tasks associated with a case workflow.
- Using Activity Streams – this module shows Agents how to use the built in news stream on their Agent Desktop Homepage to keep up to date with Case information that they are involved or interested in.
- Using Scripts – an explanation of how to use Scripts within the Agent Desktop that help to guide Agents through an interaction to achieve a suitable outcome for the customer.
- Supervisor tasks - a look at the features available to Supervisors including assigning Call Back tasks to Agents and viewing Reports related to Operational Performance, Knowledge and Case Management.
- The Actionable Dashboard - illustrates to supervisors how to use the new interactive reporting tool to monitor and action work items assigned to the teams / queues they are responsible for.

KANA Enterprise Functional Administration

Pre-requisites: None.

Audience: KANA Enterprise Business Administrator (non-technical).

Course Objective

In this course you will learn how to configure KANA Enterprise to fit to your existing Interaction Channel, Business Process and Case Management requirements.

Duration

3 days (2 days pre 14R1)

Course Topics

- Agents, Teams, Roles and Entitlements. Teams, Team Roles and Positions allow you to model your organization. Entitlements allow you to apply skills and abilities to your organization model, limiting what actions and content each user can access.
- Case Management. A Case Type defines how a certain type of enquiry should be handled to ensure a consistent approach. This topic explores the functionality available for Case Management including Case Type Definitions, Case Workflow, Case Actions, Case SLA's and Case Rules.
- Dynamic Entities. Illustrates how Dynamic Entities can be used to create simple Data Entry forms when applied to Case Management processes.
- Scripting. Scripting is used to guide an Agent through an interaction by providing information, capturing data and navigating between pages using pre-configured logic or based on responses to questions. Within this topic we explore the steps required to create, configure and deploy a Script to Agents.
- We will also demonstrate the features available to produce Dynamic Scripts such as embedding Dynamic Entity Views into Script pages and automatic system actions that can be triggered when a Script ends (e.g. Create Case).
- Correspondence Templates. Illustrates how to configure reusable templates for customer correspondence, producing standardized responses that Agents can use within the application.
- Managing Channels. This topic covers functionality related to Channel Configuration for Telephony, Email, Chat, Secure Messaging and Whitemail. In addition this topic explains the process of assigning Work Blends that allow you to configure the type of work Agents are assigned based on the volume of incoming interactions.

- Reporting, Explores the standard reports provided with KANA Enterprise which cover the Case Management, Chat, Operational and Knowledge Business Domains. You will also learn how to create custom reports and dashboards using the new Visual Report Designer and manage them within your organization.

KANA Enterprise Smart Engagement (New in 14R1)

Pre-requisites: KANA Enterprise Functional Administration course

Audience: KANA Enterprise Business Administrators (non-technical)

Course Objective

In this course you will learn how to apply Business Rules to channels you are using within KANA Enterprise to ensure the people within your organization have access to the work items relevant to them. Also by apply Business Rules to customer interactions as soon as they are received means that we can apply automated intelligence to do anything from auto-response to altering the priority of the work item to ensure it is dealt with promptly by an Agent.

Duration

1 day

Course Topics

- An Introduction to KANA Enterprise Smart Engagement. Learn what Smart Engagement is, how it can be used and why it will benefit every person using KANA Enterprise within your organization.
- Smart Engagement Customer Stories. Explore how customers are already using Smart Engagement to improve the way they process customer interactions.
- Learning how to use the Rules Editor. This topic provides a high level introduction to the Rules Editor and illustrates through basic examples how it is used.
- Setting up High Level Business Rules. Setup Business Rules that will be applied to all incoming interactions into your organization and take appropriate actions based on their contents.
- Applying Business Rules to Queues. Learn how Business Rules can be applied to the Queue level allowing for more granular analysis of the interaction information and apply additional actions as required.
- Using Business Rules for Outgoing Information. Business rules can be applied to all outgoing interactions also which enables Administrators to check for and flag issues before they reach the customer.
- Smart Engagement Best Practice. Learn from the experiences of our existing customers using Business Rules and the best way to implement this new functionality.
- Smart Engagement Case Study

KANA Enterprise Knowledge Authoring

Pre-requisites: None.

Audience: Knowledge Content Authors, Reviewers & Managers

Course Objective

In this course you will explore the KANA Enterprise knowledge authoring and review process, create different types of knowledge content and search for knowledge from both an Agent's and Customer's perspective.

Duration

0.5 day

Course Topics

- Introduction to Knowledge Management. Introduction to the concept of Knowledge Management; its advantages within an organization and the functionality provided by the KANA Enterprise KM application.
- Knowledge Management Roles & Workflow. Explores the roles contained within the KM Authoring Workflow and the actions associated with each role.
- Creating reusable Knowledge with Segments.
- Creating Knowledge Articles. Explores the steps required to Author, Review and Publish new KM Articles.
- Creating Other Types of Knowledge. Even though the workflow is the same for all Content Types the actual Authoring Form is different. In this topic we illustrate the differences between Authoring FAQs,, Knowledge Alerts, Uploaded Files compared to Knowledge Articles.
- Searching for Knowledge. Explores the Search functionality available through KANA Enterprise KM, the rating and feedback process, plus the differences between doing a Knowledge Search internally compared to externally as a Customer. In addition we explore the new multilingual search capabilities available in 13R2.
- Updating Knowledge (Providing & Managing Feedback, Archiving & Deleting, Managing Content Versions). Illustrates the steps required to process Agent Feedback and update the appropriate Knowledge as required.

KANA Enterprise Knowledge Administration

Pre-requisites: None.

Audience: Knowledge Administrators (non-technical); individuals responsible for administering knowledge processes within KANA Enterprise.

Course Objective

This course is designed to equip an administrator with the skills to effectively administer Knowledge Management processes within KANA Enterprise and improve the productivity of this valuable resource.

Duration

1.5 days

Course Topics

- Knowledge Management (KM) Administration Tasks. Summary of the common tasks required of a KANA Enterprise KM Administrator.
- Important Knowledge Management Terminologies & Concepts. Introduction to important KM concepts such as Content Types, Public & Private Data, Content Source Spidering, Knowledge Alerts, Feedback Code.
- Knowledge Management Roles & Workflow. Explores the structure of the out of the box Authoring Workflow and demonstrates how it is configured within the KANA Enterprise application.
- Agents, Teams & Entitlements. Overview of the structure and relationship between Teams, Team Roles, Users and Entitlements; includes demonstrations and exercises on configuring new KM Users within the system.
- Knowledge Management Tagsets. Tagsets allow you to classify knowledge as you add new content to your system, making the KM Search more efficient and allowing agents to browse for content. In this module we look at the Tagsets related to KM and illustrate how to update and manage them.
- Decision Trees. Decision trees guide an Agent to a specific piece of Knowledge based on a series of questions. In this topic we look at building, configuring and deploying Decision Trees so they can be found and used by Agents from a Knowledge Search.
- Knowledge Content Sources. In this topic we look at how to spider and index external sources of knowledge (websites and document folders) so that they can be searched and used by Agents in the same way as other Content Types such as Articles and FAQs.
- Translating Content. Explores the steps required to translate KM content into different languages and the multilingual search features available to your Agents.
- Additional KM Admin Tasks. Explores the steps required to configure the Content Feedback process, Stop Words and Synonyms.

- Reporting. Explores the standard reports provided with KANA Enterprise which cover the Knowledge Management specific Domains. You will also learn how to create custom KM reports using the new Visual Report Designer and manage them within your organization.
- Creating Custom Content Types. Administrators can now easily add and remove fields from Knowledge Articles, FAQs and Alerts.

KANA Enterprise Web Self Service

Pre-requisites

- KANA Enterprise Functional Administration course
- KANA Enterprise Knowledge Management Authoring course
- KANA Enterprise Knowledge Management Administration course (relevant but not mandatory)

Audience: Web Site Designer / Administrator

Course Objective

KANA Enterprise Web Self-Service is designed to simplify the delivery of online customer services and processes. Web Self-Service can run the entire online customer service solution or it can integrate to, and run as, a section of your existing web site.

This course introduces you to the important concepts and walks you through creating a simple Self Service site using the Site Designer tool and out-of-the-box widgets.

Duration

1 day

Course Topics

- An Introduction to Web Self Service
- Creating a simple site using the Site Designer
- Adding Knowledge Search to your site
- Creating and Tracking Cases via Web Self Service
- Creating a Custom Site Theme
- Building a Custom Widget

KANA Enterprise Advanced Reporting

Pre-requisites

- Knowledge of SQL

Audience: Reporting Professional or Database Administrator

Course Objective

The aim of this course is to explore, enhance and extend the existing KANA Enterprise Reporting Schema. The student will also learn how to use the basic functionality of the new Jasper Studio tool (Eclipse Plug-in) to create new reports based on the schema extensions and make these accessible to KANA Enterprise users.

Duration

2 days

Course Topics

- An Introduction to KANA Enterprise Reporting Architecture
- Exploring the KANA Enterprise Standard Reports
- Using the Visual Report Builder to create a simple report
- Exploring the Reporting Schema using SQL
- Creating new Report Domains
- Extending the Existing Reporting Schema
- Creating a simple report using Jasper Studio
- Uploading Reports to Jasper Server
- Report Parameters and Input Controls
- Report Parameters with Multiple Values
- Tabular Reports
- Crosstab Reports
- Report Charts

KANA Enterprise 13R2 New Features

Pre-requisites

The student must have already completed the following courses:

- KANA Enterprise Functional Administration 13R1
- KANA Enterprise Knowledge Administration 13R1
- KANA Enterprise Knowledge Authoring 13R1

Audience:

- KANA Enterprise Business Administrator (non-technical).
- KANA Enterprise Knowledge Administrators

Course Objective

In this course you will learn the new features available within KANA Enterprise 13R2.

Duration

1 day.

Course Topics

- Dynamic Scripting – learn how Scripts can be used to create more complex Case Forms with enhanced logic and presentation capabilities. Also learn how to auto generate Cases and Wrap up codes based on the Exit Point from a Script.

- Multilingual Search – learn how to search for Knowledge Content using different languages and how to display the multilingual versions to users.

- Translating Content – learn how to export KM content for translation and import the translated content so that it's available to users.

- Reporting – Explore the improved range of standard reports that are provided with KANA Enterprise and learn how to create custom reports using the new Visual Report Designer tool. Publish and Manage your custom reports and setup schedules.

- Expanding Entities– Learn how to add custom fields to the Customer, Contact and Agent Entities. Display these custom fields to users within the Agent Desktop and use them when collecting data (e.g. Customer Profile Information).

- Migration – learn how to export and import Domains of data (Knowledge, Content and Business Configuration) between different KANA Enterprise Environments.

KANA Enterprise 14R1 New Features

Pre-requisites

The student must have already completed the following courses:

- KANA Enterprise Agent Desktop 13R2
- KANA Enterprise Functional Administration 13R2
- KANA Enterprise Knowledge Administration 13R2
- KANA Enterprise Knowledge Authoring 13R2

Audience:

- KANA Enterprise Business Administrator (non-technical).
- KANA Enterprise Knowledge Administrators

Course Objective

In this course you will learn the new features available within KANA Enterprise 14R1.

Duration

2 days

Course Topics

Agent Desktop Features

- New Case Management Screens
- Using Activity Streams. This module shows Agents how to use the built in news stream on their Agent Desktop Homepage to keep up to date with Case information that they are involved or interested in.
- Working with Secure Messaging. 14R1 now provides the ability to handle Secure Messages and this topic illustrates the process of doing this within the Agent Desktop.
- The Actionable Dashboard. This module illustrates to supervisors how to use the new interactive reporting tool to monitor and action work items assigned to the teams / queues they are responsible for.

Case Management Features

- Dynamic Entity Enhancements
- New Case Actions. The Case Management topic has been improved to include examples of the new Case Actions available within 14R1. These are Change Case Owner, Create Internal Action, Compose Whitemail, Call Customer and Change Case State.
- Using Case Templates – Create reusable templates that can apply generic settings to new Case Types that you create within KANA Enterprise.
- Manage Case Relationships – Learn how to define the types of relationships that can link cases together.

Chat Features

- Creating new Chat Users. Within 14R1 administrators can setup new Chat users without leaving KANA Enterprise.

Email Features

- An Introduction to KANA Enterprise Business Rules. Within this module we illustrate how Business Rules can trigger actions on incoming channel interactions based on their contents. This may be simply routing an email to a specific queue or doing something more complex like increasing the work item SLA and auto-responding to the customer.

Secure Messaging Features.

- Using Secure Messaging
- Configure Secure Messaging
- Applying Business Rules to Secure Messages

Knowledge Features

- Creating Reusable Knowledge Segments
- Using the Visual Decision Tree Designer. In 14R1 Decision Trees are now created using a new graphical designer that makes it easier to design the structure, pages and links within your Decision Tree.
- Creating Custom Content Types. Administrators can now easily add and remove fields from Knowledge Articles, FAQs and Alerts.

Scripting Features

- The Visual Script Designer. Within 14R1 administrators now create the structure, pages and links for Scripts using a new graphical designer that makes it quicker and easier than before.
- Reusable Script Components. Learn how to manage reusable Script text and the differences between Sub-Scripts, Reusable Page Components, Templates and Reference Information.
- Single Page Script Display – Learn how this feature makes the navigation between Script pages transparent to users as relevant options appear on the same page as they select answers to the questions presented.

Course Library – Supported eLearning

Our Supported eLearning courses address the training needs of the System Administrator plus Technical Developer.

Students will be supported through their learning with a number of virtual interactive sessions with a VERINT trainer, and will have access to on-going support through forums and Q&A available through the VERINT Learning Portal.

Students will have their skills and lab solutions assessed during the training and a final assessment of their strengths and weakness will be made available.

An Introduction to KANA Enterprise

Pre-requisites: None

Course Objective

This course provides an overview of KANA Enterprise key concepts and components. Aimed at project staff who require an understanding of the capabilities of KANA Enterprise without the need to be trained on how to configure or use the application itself (e.g. Project Managers).

Duration

1 day

Course Topics

- A Typical Agent Journey – using the Agent Desktop to deal with a Customer Interaction
- An Overview of Agents, Teams, Roles and Entitlements
- What are Tagsets?
- What are Dynamic Entities?
- KANA Enterprise Case Management
- An Introduction to Scripting
- An Overview of Knowledge Management
- What is Smart Engagement?
- An Overview of KANA Enterprise Chat
- The Social Channel
- Working with Whitemail
- Knowledge Infused Processes
- Web Self Service

Searching and Browsing for Knowledge

Pre-requisites: None

Course Objective

This course explores the functionality and features available to Agents when using Verint Knowledge Management. The objective of the course is to teach Agents how to effectively search and browse for knowledge when answering customer queries and interactions. They will also learn how to send feedback to content authors and request additional content when gaps in the existing knowledge base are discovered.

Audience:

- Knowledge Agents

Duration

0.5 day

Course Topics

- An Introduction to the Knowledge Centre
- Viewing Alerts, Featured and Top Content
- Performing Keyword Searches
- Understanding the Search Results
- Using the Search Cloud
- Browsing for Knowledge and using Filters
- Requesting Knowledge
- Bookmarking, Rating Content and Sending Feedback
- Emailing Content to Customers
- Additional Search Options (to optimize search results)

KANA Live Chat

Pre-requisites: None

Course Objective

With KANA Enterprise Live Chat, your agents can service customers when they need it the most — in real time. This course provides an overview of how to use, manage, configure and customize KANA Live Chat.

Duration

1 day

Course Topics

- An Introduction to KANA Live Chat
- An overview of Chat Interactions
- Transferring a Chat Conversation
- Agent Chat Consult
- Using Chat Templates
- Chat Conferencing
- Using the Synchronous Dashboard
- Monitoring Waiting Chats on the Dashboard
- Adding Agents to a Queue via the Dashboard
- Setting up a new Chat Agent
- Using Business Rules with Chat
- Text Chat Configuration
- Setting the Chat Threshold
- Adding custom fields to the Chat Launch Page

KANA Enterprise System Administration

Pre-requisites: KE Functional Administration course, experience in system administration, an understanding of the Java technology stack.

Course Objective

In this course you will learn the basic skills and knowledge that a KE System Administrator or Technical Consultant requires during each phase of a project, including:

- Design & Build
- Deployment
- Monitoring and Maintenance
- System Upgrade

Duration

This course is typically taken over a 15 day period when done through Supported eLearning but is also available as Instructor Led Training if required. This can reduce the delivery time if only relevant topics to the project are taught.

Course Topics

- Architecture Overview. An overview of the logical and deployment architecture of KE. This module also introduces strategies for scaling deployment architecture horizontally and vertically.
- Base Product Install. Performing a standard KE product install from base Linux OS to set up a development environment. Includes topics on release management and integration of a version control system.
- Channel Setup. Initial technical (non-business) setup for Agent channels such as Email, Whitemail, Chat and Telephony.
- KE Database. Brief overview of the KE database schema together with some useful procedures and tables for system administrators.
- Authentication Integration. Integrating KANA Enterprise to an external authentication mechanism (LDAP is used in the exercises).
- System Configuration. An overview of the system configuration property hierarchy followed by coverage of the most important configuration parameters and procedures for a system deployment.
- Performance Testing and Troubleshooting. Best practice methods, tools and principles to test and troubleshoot performance of a configured KE deployment before go-live.
- External Components. Configuring a static front-end web server, load balancing and spell-check functionality for KE using common open-licensed 3rd party technologies.
- Security Best Practices. Best practice security recommendations for KE Agent Desktop and Web Self Service application server deployment.

- Production Monitoring. Best practice methods to configure and monitor a production deployment of KE using the industry standard Nagios system. Includes troubleshooting methods that are appropriate to a live environment.
- Archiving. Configuration and best practice methods to archive data on a production environment, particularly system logs.
- BAU Migration. Business-As-Usual migration, enabling transfer of configuration data between live environments.
- BAU Patches. Applying supported maintenance patches to a live system using best practice procedures.
- BAU Upgrade. Recommended steps to perform a complete upgrade between major product release versions, including migration of data and patches.

KANA Enterprise Technical Developer

Pre-requisites: A strong working knowledge of:

- Object Oriented concepts
- Relational database concepts
- Programming experience with an object-oriented language

Audience: Technical Developers

Course Objective

Provide students with the skills to build custom solutions that go beyond that available out-of-the-box.

The course has 2 parts introductory level modules and intermediary level modules; the intermediary level modules are appropriate for students who have successfully completed the introductory modules.

Duration

The introductory level modules are typically taken over a 2 week period, but may be compressed into a shorter time period.

The intermediary level modules are typically taken over a 1 week period, but may be compressed into a shorter time period.

Course Topics

Introduction to Processes (Introductory Level module)

This module introduces the concept of a KANA Enterprise Process and the steps required to build it within the Customer Experience Developer (CED).

The key learning objectives for this module are; learn how to create a simple process using the Customer Experience Developer (CED), extend the functionality of KANA Enterprise by building new process functionality, integrate to data sources and create flexible user interfaces using the CED.

Screen casts available:

- Starting the Process Platform
- Introduction to the CED; Process Tool, Form Tool, Procedure Tool
- Module Structure and Best Practice
- Creating the First Process; Creating CustomerMain, Adding buttons, Simple Event Guard, Running the Process, Look and Feel
- Simple Sub-Process
- Formholder and Dataflow; plus Create Customer Exercise
- Navigation Look and Feel; Back Btn, Navigation Look and Feel, Enable Btn
- Data Objects – Logical Model

- Data Connections; Set up data connection, Connecting Schema Tool
- Simple Data Manipulation; Data Adapters, Define a List, Data Graph on a process, Do Nothing node, Display List Data, Views
- Exceptions
- Simple List Manipulation; Selecting From a List, Formatters
- Introduction to Layout Managers
- Committing Data
- Passing data by Reference
- Updating Data
- Debugging

Introducing EVA (Introductory Level module)

Within KANA Enterprise the Entity Verb Association (EVA) Framework allows a technical developer to specify a list of domain entities which may represent business objects such as Customer, Policy or Address and be able to specify the tasks which can be carried out on the entities.

This module takes the student through the steps involved in defining and configuring their first EVA Framework solutions.

Screen casts available:

- Defining Entities
- Entity Relationships
- Working With Verbs
- Process Patterns

Tutorial / Screen casts available:

- Getting started
- Auto Generation
- Define the API
- Creation of a list
- Extending the Entity
- Datagraphs for find
- Overriding Methods
- InlineList Verb
- Entity Definition
- Create Functionality
- Edit Functionality

Expanding Entities (Introductory Level module)

An Entity within KANA Enterprise is a Business Object (e.g. Contacts, Customers, Agents etc). This module investigates how to expand an entity via the Administration Desktop.

The module includes:

- An introduction to Expanding Entities.
- Demonstrations on how to expand the Contact and Customer Entities.
- Instruction on how to use fields from an expanded entity within email templates.
- An explanation on how an expanded field can be used in a custom process within the Customer Experience Designer.

Advanced EVA - Extending an Entity (Intermediary Level module)

One of the powers of Enterprise is its' ability to customize and extend out of the box functionality to fit the exact requirements of any solution. One such area of extension is the out of the box Customer functionality.

In this module we show you how to extend Customer to include some specific data and allow this extended Customer to use the out of the box customer creation and search screens.

- Screen casts available:
- Implementing methods to extend an entity
- Reconfiguring the entity
- Testing create
- Searching for entities
- Testing search

KANA Enterprise Web Services (Intermediary Level module)

This training course illustrates how to develop, deploy, implement and integrate Web Services within KANA Enterprise. The course modules include:

Creating a Web Service using KANA Enterprise – within this module you will learn how to deploy a WSDL based on a new or existing process that you have created within the KANA Enterprise toolkit. You will also learn how to import the Web Service using Apache CXF and invoke the Web Service within another KANA Enterprise process.

Implementing 3rd Party Web Services – this module explains how to integrate with an external web service, invoke a call and process the returning data so that it can be used within a KANA Enterprise process.

Using the KANA Enterprise Web Services – this final module illustrates some of the Web Services provided with KANA Enterprise related to Knowledge Management, Customer Management and Case Management. You will learn how to invoke and use these Web Services within SoapUI.

Custom components (Intermediary Level module)

This training addresses the features available in the Component Tool to facilitate the integration of Custom Components with the CED. When you specify a Custom Component you will be asked to specify the Component Properties, Component Functions and a Bound Type which will then be used by the CED. For example, in the Procedure Tool the Component Functions will appear in the scope popup and in the Form Tool the Bound Type is used to ensure that the intended type is used when binding the component to a field. The module videos walk through an example of setting up the component in the Custom Component Tool, and using the component in a process.

Screen casts available:

- The component tool
- The component in a process

Additional information

- Custom component example

Integrating Java Classes (Intermediary Level module)

This module investigates how the CED integrates Java classes. It provides details on the following functionality:

JAR Management, importing a JAR file into your CED gives access to the classes it contains. A JAR management dialog is created to allow you to add, remove or refresh your imported JARs. The Refresh function ensures that the imported classes are kept in sync with the corresponding classes in the JAR files.

Importing Java Classes, prior to version 13R1 you needed to create a JavaBean wrapper and import it using the Bean Tool for any Java class you wanted to import. Using the new Java import functionality you can now import the Java class directly from a JAR file from the imports tab of a repository item. For each import an Autobean is created which gets added to your Repository.

Verint. Powering Actionable Intelligence.®

Verint® (NASDAQ: VRNT) is a global leader in Actionable Intelligence® solutions. Actionable Intelligence is a necessity in a dynamic world of massive information growth because it empowers organisations with crucial insights and enables decision makers to anticipate, respond and take action. Verint Actionable Intelligence solutions help organisations address three important challenges: customer engagement optimisation; security intelligence; and fraud, risk, and compliance. Today, more than 10,000 organisations in over 180 countries, including over 80 percent of the Fortune 100, use Verint solutions to improve enterprise performance and make the world a safer place. Learn more at www.verint.com.