# Verint Education Services
# Engagement Management
Training Catalog

# Contents

Introducing VERINT Education Services ........ 2
- About This Catalog ........ 2
- Contact Us ........ 2

VERINT Learning Channels ........ 3
- VERINT Instructor Led Training (ILT) ........ 3
- On-Site Classes ........ 3
- Open Enrolment Classes ........ 3
- Virtual Classroom ........ 4
- VERINT Supported eLearning ........ 4
- VERINT eLearning (Self-Paced) ........ 4

Course Library – Instructor Led Training ........ 5
- Agent Desktop ........ 6
- Chat Agents and Supervisors ........ 7
- Social Engagement – Gatekeepers and Supervisors ........ 8
- Functional Administration ........ 9
- Email Administration ........ 11
- Chat Administration ........ 12
- Social Engagement Administration ........ 13
- Smart Engagement ........ 14
- Knowledge Authoring ........ 15
- Knowledge Administration ........ 16
- Advanced Reporting ........ 18
- System Administration ........ 19

Course Library – Supported eLearning ........ 20
- Technical Developer ........ 21
  - Introduction to Processes (Introductory Level module) ........ 21
  - Introducing EVA (Introductory Level module) ........ 22
  - Making an Entity Searchable (Intermediary Level module) ........ 23
  - Expanding and Extending Entities (Intermediary Level module) ........ 23
  - Web Services (Intermediary Level module) ........ 23

# Introducing VERINT Education Services

VERINT Education Services offer comprehensive training in the Engagement Management (Engagement Management) 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 Catalog

This catalog provides a description of the Engagement Management, previously known as Engagement Management, courses available. This includes 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 catalog 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](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 Engagement Management 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.

Engagement Management 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.

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 Supported eLearning modules.

## VERINT eLearning (Self-Paced)

Our self-paced eLearning curriculum is aimed at Agent training where there are typically high volumes of end users that need to learn the application.

Our eLearning courses consist of video presentations, demonstrations, step-by-step exercise documentation and quiz assessments. Access to the eLearning can be granted through a single enterprise account on the Verint Learning Management System (LMS) or the learning modules can be downloaded and hosted on your own corporate training solution.

**Note** – Access to online tutor support and a training environment is not provided as part of this eLearning package.

# 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.

## Agent Desktop

**Pre-requisites:** None.

**Audience:** Engagement Management 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 Engagement Management – 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.

## Chat Agents and Supervisors

**Pre-requisites:** None.

**Audience:** Engagement Management Agents / Contact Centre Agents / Supervisors

**Course Objective**

In this course Agents will learn how to use all the features and functions available when interacting with customers via Chat. Supervisors will also learn how to monitor Chat sessions, assist the Agent and join the session if required.

**Duration**

1 day

**Course Topics**

- An Introduction to Chat
- Agent to Customer Chat
- Managing Customers
- Using Chat Templates
- Chat Transfers
- Chat Consults
- Chat Conferencing
- Monitoring Chat using the Synchronous Dashboard
- Chat Whisper
- Chat Barge-In

## Social Engagement – Gatekeepers and Supervisors

**Pre-requisites:** None.

**Audience:** Social Media Agents & Gatekeepers

**Course Objective**

This course teaches the skills required by Social Gatekeepers to monitor, reply and escalate Social messages. It also illustrates how Supervisors can access analysis and reporting information for the Social channel.

**Duration**

0.5 day

**Course Topics**

- An introduction to Verint Social Engagement
- Using the Social Engagement Inbox
- Viewing information about the Social message author
- Replying and Escalating Messages
- Using the Social Archive
- Social Channel Dashboards
- Creating Social Media Reports
- Publishing and Scheduling Social Posts

## Functional Administration

**Pre-requisites:** None.

**Audience:** Engagement Management Business Administrator (non-technical).

**Course Objective**

In this course you will learn how to configure Engagement Management 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.
- Managing Tagsets. Create reusable lists than are useful in Case Forms, Scripting and Knowledge.
- Creating Case Forms. Illustrates how Dynamic Entities can be used to create simple Data Entry forms when applied to Case Management processes.
- 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.
- 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 Engagement Management 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.

## Email Administration

**Pre-requisites:** None.

**Audience:** Engagement Management Business Administrator (non-technical).

**Course Objective**

This course is targeted at customers that have implemented Engagement Management for email only. In this course you will learn how to configure Engagement Management based on your email channel requirements.

**Duration**

1 day

**Course Topics**

- Agent, Teams, Roles and Entitlements
- Creating Email Templates
- Setting up Email Queues
- Creating Email Business Rules
- Managing the Email Work Blend
- Email Configuration
- Managing Email Categories
- Configuring the email Quality Assurance process
- Managing Contact Outcome Codes
- Performing Bulk Email Operations
- Reporting

## Chat Administration

**Pre-requisites:** None.

**Audience:** Engagement Management Business Administrator (non-technical).

**Course Objective**

This course is targeted at customers that have implemented Engagement Management for Live Chat only. In this course you will learn how to configure Engagement Management based on your Chat channel requirements.

**Duration**

1 day

**Course Topics**

- Agent, Teams, Roles and Entitlements
- Creating Chat Templates
- Managing Chat Queues
- Chat Business Rules
- Configuration and Customization
- Reporting

## Social Engagement Administration

**Pre-requisites:** None.

**Audience:** Engagement Management Administrators

**Course Objective**

This course teaches you how to configure Social Engagement within Engagement Management.

**Duration**

1 day

**Course Topics**

- An introduction to Verint Social Engagement
- Configuring Profiles
- Managing User Accounts
- Connecting to the Organizations Facebook and Twitter accounts
- Configuring Categories and Labels
- Service Levels for Social Replies
- Scheduling Reports
- Configuring Exclusions
- Social Engagement Business Rules

## Smart Engagement

**Pre-requisites:** Engagement Management Functional Administration course

**Audience:** Engagement Management Business Administrators (non-technical)

**Course Objective**

In this course you will learn how to apply Business Rules to channels you are using within Engagement Management to ensure the people within your organization have access to the work items relevant to them. By applying Business Rules to customer interactions as soon as they are received allows automated intelligence to do anything from auto-response to altering the priority of the work item, ensuring it is dealt with promptly by an Agent.

**Duration**

1 day

**Course Topics**

- An Introduction to Engagement Management Smart Engagement. Learn what Smart Engagement is, how it can be used and why it will benefit every person using Engagement Management 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

## Knowledge Authoring

**Pre-requisites:** None.

**Audience:** Knowledge Content Authors, Reviewers & Managers

**Course Objective**

In this course you will explore the Engagement Management 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**

1 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 Engagement Management 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 Engagement Management KM, the rating and feedback process, search best practice, plus the differences between doing a Knowledge Search internally compared to externally as a Customer.
- 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.

## Knowledge Administration

**Pre-requisites:** None.

**Audience:** Knowledge Administrators (non-technical); individuals responsible for administering knowledge processes within Engagement Management.

**Course Objective**

This course is designed to equip an administrator with the skills to effectively administer Knowledge Management processes within Engagement Management and improve the productivity of the organization's Knowledge Base.

**Duration**

2 days

**Course Topics**

- Knowledge Management (KM) Administration Tasks. Summary of the common tasks required of a Engagement Management 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 Engagement Management 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 Engagement Management 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.

## 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 Engagement Management 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 Engagement Management users.

**Duration**

2 days

**Course Topics**

- An Introduction to Engagement Management Reporting Architecture
- Exploring the Engagement Management 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

## 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 System Administrator requires to setup, deploy and manage an EM environment.

**Duration**

2 days

**Course Topics**

- EM Architecture Overview
- Setting up a local environment
- Managing users, teams, roles and entitlements
- Properties configuration
- Upgrades and patches
- Understanding the release process
- Troubleshooting issues and raising support tickets

# Course Library – Supported eLearning

Engagement Management Supported eLearning modules consist of mixed format material for delegates to interact with.  The majority of the material consists of videos presentations and demonstrations, which are supported with documentation, tutorials and hands-on practice done on a local training virtual machine.

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.

## 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 take approximately 10 days to complete.

The intermediary level modules take approximately 5 days to complete.

**Course Topics**

### *Introduction to Processes (Introductory Level module)*

This module introduces the concept of an Engagement Management 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 Engagement Management by building new process functionality, integrate to data sources and create flexible user interfaces using the CED.

- 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 Engagement Management 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.

- 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

## *Making an Entity Searchable (Intermediary Level module)*

This module illustrates the steps required to make the entity you created within 'Introduction to EVA' searchable within the application.

The module includes:

- Creating the InlineSearch Verb
- Implementing the Search Framework
- Testing the Solution

## *Expanding and Extending Entities (Intermediary Level module)*

In this module we explore how to expand and extend Entities within Engagement Management and compare the differences between the two methods. This is required when we need to configure the data that can be stored against common Entities such as Customers, Contacts, Agents etc. within the system.

The module includes:

- Expanding vs Extending Entities
- Expanding Entities using the Admin screens
- Extending Entities using the CED toolkit
- Configuring Customer Profile Flags

## *Web Services (Intermediary Level module)*

This module illustrates how to develop, deploy, implement and integrate Web Services within Engagement Management.

- Creating a Web Service using the CED Toolkit
- Implementing 3rd Party Web Services
- Using the Engagement Management Web Services

## About Verint Systems Inc.

Verint® (Nasdaq: VRNT) is a global leader in Actionable Intelligence® solutions with a focus on customer engagement optimization, security intelligence, and fraud, risk and compliance. Today, more than 10,000 organizations in 180 countries—including over 80 percent of the Fortune 100—count on intelligence from Verint solutions to make more informed, effective and timely decisions. Learn more about how we're creating A Smarter World with Actionable Intelligence® at www.verint.com.