

## Training Program

### «bpm'online Service Enterprise functionality for end-users»

**Target audience:** This training is intended for starting end-users of bpm'online Service Enterprise. It will as well provide a complete overview of the system for partners and clients of bpm'online who would like to receive an in-depth look at the complete functionality of bpm'online Service Enterprise.

**Summary:** Participants will receive basic knowledge of the bpm'online platform, support ideology, as well as experience using the out-of-the-box support tools for resolving support issues or requests, both for internal and external support. It will cover the organization of support services, support engineers, as well as call-center operators.

**Training Time:** 2 days for 4 hour sessions each.

### Training Program

| Time          | Topic   |
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| Day 1         |   |
| 11:00 – 11:15 | Introduction to bpm'online service enterprise. Service management for all communication channels.   |
| 11:00 – 11:30 | Introduction to the bpm'online interface and terminology. <ul style="list-style-type: none"> <li>• Omnichannel communication (communication panel and notification center.)</li> <li>• Summary of workspaces and system sections.</li> <li>• System section structure.</li> <li>• Bpm'online Academy site and how to find answers</li> </ul>  |
| 11:30 – 12:00 | 360 ° Customer view. Single Contact and Account database. <ul style="list-style-type: none"> <li>• Managing client/partner/competitor data in the "Account" section</li> <li>• Managing contacts and employee data in the "Contact" section</li> </ul>  |
| 12:00 – 1:30  | Special tools and actions <ul style="list-style-type: none"> <li>• Duplicate search and merge</li> <li>• OpenStreetMap OpenStreetMap address search</li> <li>• Contact synchronization with Google Contacts and MS Exchange</li> </ul>  |
| 1:30 – 1:45   | Service catalog management – single look-up for formalizing support service workflows <ul style="list-style-type: none"> <li>• Service catalog characteristics</li> <li>• Summary analytics for services</li> </ul>   |
| 1:45 – 2:00   | Service Agreements <ul style="list-style-type: none"> <li>• Multi-calendar functionality</li> <li>• Service team management</li> <li>• Service list detail</li> </ul>   |
| 2:45 – 3:10   | Case Management <ul style="list-style-type: none"> <li>• Support center organization</li> </ul> Case registration <ul style="list-style-type: none"> <li>• Entering key information – addressee and case description</li> <li>• Case auto-registration on incoming emails</li> <li>• Case registration via phone call</li> </ul> Investigation and resolving cases <ul style="list-style-type: none"> <li>• Out-of-the-box case management process</li> <li>• Resolving support cases with the help of the Knowledge Base</li> </ul> Using the basic case analytics |
| 3:10 – 3:30   | Problem Management  |

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|             | <ul style="list-style-type: none"> <li>• Problem Registration</li> <li>• Managing connected cases</li> <li>• Problem resolution team management</li> </ul>   |
| 3:30 – 4:50 | <b>Change Management</b> <ul style="list-style-type: none"> <li>• Section definition</li> <li>• Change classification</li> <li>• Connected configuration items and cases</li> </ul>  |
| 4:50 – 5:10 | <b>Release Management</b> <ul style="list-style-type: none"> <li>• Section definition</li> <li>• Connected sections</li> <li>• Release team management</li> <li>• Resource management</li> </ul>   |
| 5:10 – 5:30 | <b>Case and contact segmentation. Advanced search tools and filters.</b> <ul style="list-style-type: none"> <li>• Filter types: Quick, Standard, Advanced</li> <li>• Folder trees and tags</li> <li>• System navigation with the command line. Command line customization.</li> <li>• Aggregated columns on the section page – automated count of cases, contacts, accounts</li> <li>• Interpreting analytics in bpm'online</li> </ul> |

| Time          | Topic   |
|---------------|---|
| Day 2         |   |
| 11:00 – 12:20 | <b>Single Agent Desktop – flexible organizational tool for call-centers and service specialists</b> <ul style="list-style-type: none"> <li>• Agent Desktop overview</li> <li>• Queue management – organization and setup of case queues</li> </ul>  |
| 12:20 – 1:00  | <b>Self-service portal – client self-registration and client case creation</b> <ul style="list-style-type: none"> <li>• Setting up the self-service portal</li> <li>• Creating portal users</li> <li>• Access right overview for portal users</li> <li>• Portal user abilities</li> </ul>   |
| 1:00 – 1:30   | <b>Configuration item management</b> <ul style="list-style-type: none"> <li>• Configuration items</li> <li>• Configuration item connections</li> <li>• Graphical interconnected item web</li> </ul>   |
| 1:30 – 2:00   | <b>Communication and task management</b> <ul style="list-style-type: none"> <li>• Working with activities</li> <li>• Integrated email functionality in bpm'online</li> <li>• Telephony integration</li> <li>• Corporate social feed</li> </ul>  |
| 2:00 – 2:20   | <b>Mobile application</b> <ul style="list-style-type: none"> <li>• Installing the application and list setup</li> <li>• Offline vs Online operation mode</li> <li>• Workplace setup</li> </ul>  |
| 2:20 – 2:40   | <b>Knowledge Management – single look-up database, regulations and instructions, document templates</b>   |
| 2:40 – 3:10   | <b>System Designer – complete customization of system settings by administrations. Getting the system ready for end-users.</b> <ul style="list-style-type: none"> <li>• Color and logo customization</li> <li>• Filling and editing lookups</li> <li>• Universal Excel import (importing client databases, lookups, and other information.)</li> <li>• Adding new sections, fields, and details.</li> <li>• Managing and administrating users.</li> <li>• Using business processes</li> </ul> |

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|             | <ul style="list-style-type: none"><li>• Printable form setup</li></ul>  |
| 3:10 – 3:20 | <b>Bpm'online Academy</b> <ul style="list-style-type: none"><li>• Video tutorials</li><li>• Navigating system documentation</li><li>• Self-assessments and certification</li></ul> <b>New trainings and webinar announcements</b> |