

Lagan Education Services

Lagan CRM Training Brochure



LAGAN

Contents

| | |
|--|-----------|
| About Lagan Education Services..... | 3 |
| INSTRUCTOR-LED TRAINING | 3 |
| LAGAN VIRTUAL CLASSROOM | 4 |
| ELEARNING | 4 |
| Course Library..... | 6 |
| COURSE DEPENDENCIES..... | 7 |
| LAGAN PRODUCT OVERVIEW | 8 |
| LAGAN ECM WORKSTATION™ | 9 |
| LAGAN VIRTUAL OFFICE™ | 10 |
| LAGAN CRM TRAIN THE TRAINER..... | 11 |
| LAGAN CRM TRAIN THE TRAINER CERTIFICATION | 13 |
| LAGAN CRM BUSINESS CONFIGURATION..... | 14 |
| LAGAN CRM SCRIPT FLOW..... | 15 |
| LAGAN BUSINESS PROCESS MANAGEMENT (BPM)..... | 16 |
| LAGAN ADVANCED BPM | 17 |
| LAGAN KNOWLEDGE | 18 |
| LAGAN MAINTENANCE & SUPPORT | 20 |
| LAGAN ECM INSTALLATION AND UPGRADE | 21 |
| LAGAN CRM ADVANCED CONFIGURATION | 22 |
| LAGAN EFORMS..... | 23 |
| LAGAN SECURITY | 24 |
| LAGAN PORTLET CONFIGURATION & ODM..... | 25 |
| LAGAN ODM EXTENSIONS | 26 |
| IMPLEMENTING LAGAN SELF SERVICE..... | 27 |
| LAGAN REPORTING..... | 28 |
| LAGAN BUSINESS INTELLIGENCE I: FUNDAMENTALS OF REPORT DESIGN | 29 |
| LAGAN BUSINESS INTELLIGENCE II: ADVANCED REPORTING..... | 30 |
| LAGAN BUSINESS INTELLIGENCE DASHBOARDS..... | 31 |
| INTRODUCTION TO SQL | 32 |
| Roles and Skills Matrix | 33 |

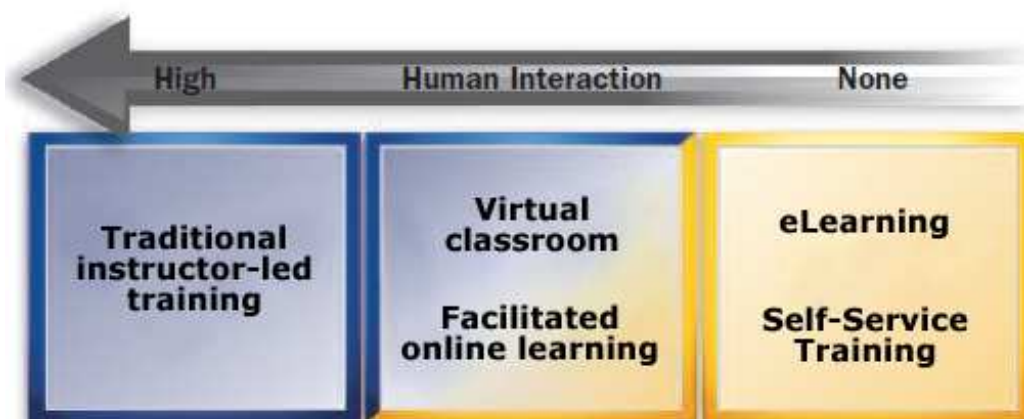
About Lagan Education Services

Whether you've just been tasked with managing the configuration of Lagan ECM or are preparing to implement a large-scale Lagan ECM project for your company, Lagan Education Services offer training courses and consultancy to meet your specific needs and skill level.

Our learning paths are tailored to job roles so you can see at a glance the courses that are recommended for a specific function. Each path suggests a sequence of standard courses that will provide you with the knowledge and skills you need for on-the-job expertise.

Lagan Education Services can also offer flexibility in training your teams by creating custom elearn or instructor-led courses built upon our proven education templates. While our core offerings meet the education needs of most clients, customised courses can help ensure user acceptance by enabling users to relate the tool to their specific business processes, for example by having customised end-user training that reflects your organisation's business processes and configuration, will make the training more relevant and meaningful to the students. Our options range from accelerated custom agendas and customised exercises to complete course customisation and course creation.

We realise that not everybody learns the same way or at the same pace. Some individuals like a classroom environment whilst others do well with self-paced methods that are easier on your time and budget. As such Lagan Education Services support a range of delivery methods including: traditional instructor-led training, virtual classroom training, and eLearning (or self-service training). You can therefore choose the delivery mode that's right for you.



Instructor-Led Training

Our live instructor-led training is considered by all to be the most effective, as it best facilitates real-interaction, the sharing of in-depth information and direct responses to questions. Our instructors are dedicated trainers who go through a rigorous certification process to ensure that they are fully competent in the Lagan product set. Constant customer interaction means that our trainers understand how our customers use our products and can therefore offer real value by providing real world examples of how functionality has been implemented at other sites.

Each course is broken into a number of small learning “chunks” (or modules), each of which focus on a specific piece of product functionality. Modules are taught via a

short presentation, which encompasses the theory and real world examples, group discussion, question and answer sessions, instructor demonstrations that illustrate how to perform a specific task (or tasks), and intensive practical / hands-on exercises that provide the students with the opportunity to experiment and use the Lagan product.

All students will receive a CD that contains a copy of the course PowerPoints, screencams (i.e. videos) of relevant product demonstrations, and any other supporting materials for the course such as quick reference guides or product manuals. A hard-copy of the exercise manual will also be provided to each student. The latter acts as an after-class reference guide as it contains detailed instructions on how to complete specific tasks as well as explanations and guidance on configuring the system.

All of our courses can be delivered publicly at our UK Training Centre (in Belfast) or if you have more than five individuals who need training in the same course, then Lagan Education Services can deliver the training privately, onsite at your location.

Lagan Virtual Classroom

The Lagan Virtual Classroom is a new step in modern learning; it is distance learning training events taught LIVE over the web using interactive web and audio conferencing tools.

A subset of Lagan's instructor-led courses is available for delivery within the Virtual Classroom. The 'online' versions these courses are segmented into multiple half-day sessions, during which there will be a 2-3 hour lecture followed by a 1-hour lab or exercise review.

With the Lagan Virtual Classroom you will train with the same instructors as on our face to face classes, use the same high quality content, and receive access to the same exercises as used in our normal classes. During the session you can participate freely and 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. The instructor will demonstrate the topics before asking you to learn by carrying out the exercises. The examples, exercises, and pacing have all been adjusted to ensure a high quality interactive experience.

By attending the live Lagan Virtual Classroom you can gain your knowledge without the expense of time and travel. You remain productive at work and gain more from your training budget. You can participate in a live virtual class from anywhere; the office, home, on the go, or wherever you can access a broadband internet connection.

Elearning

Our elearning courses (eCourses) are self-paced, asynchronous (not live) training programs which encompass a combination of components including lessons, interactive demonstrations, simulations, email, chat, discussions boards, quizzes, self-assessment tools, and wikis. These elements create an engaging and interactive learning experience for students, and by offering a range of delivery methods it

ensures that the training caters for multiple learning styles thereby making it more effective for certain learners.

Skills practice is an essential and important element of our eCourses as learners need opportunities to practice new skills and become comfortable with applying them. As such a range of product simulations are embedded within each course topic enabling learners to practice and complete specific tasks. These simulations provide the extra benefits of (1) enabling learners to practice their skills in a safe environment; (2) there is no risk that data within your live or development system will become clogged with unnecessary training data and (3) learners can keep their skills fresh and up-to-date before the project go-live date.

As people are typically social learners and like to learn in groups exchanging thoughts and ideas and interacting with peers face-to-face, each eCourse contains components that enable this experience for self-service learners. The following elements are embedded within each course:

- 'Ask a Question' whereby you can email a query to Lagan Education Services regarding the course
- Discussion boards which enable you to ask questions of and share ideas with your fellow students
- The ability to add to, modify, and rate glossary and FAQ entries
- Chat sessions with a qualified Lagan trainer
- Wikis for composing and sharing knowledge and hints and tips with other students

These technology tools foster student interaction and collaboration amongst themselves and with Lagan instructors.

Furthermore each eCourse has been designed to offer 'electronic learning support' to its students. This enables learning to be targeted so that it is available to learners when they need it, where they need it, and with just the right focus. Learners can therefore use the eCourse in much the same way as they use a reference book, going to it for information on an as-needed basis. For instance, if a learner required help sending a general message from the Lagan ECM Workstation, they could immediately access an interactive demonstration that illustrates how to complete this task.

Course Library

The library presents the full range of end-user, business, and technical courses offered by Lagan Education Services. A subset of these courses is available for delivery via the Lagan Virtual Classroom or as elearning programmes. The following symbols are used to indicate the course delivery mode:



Instructor-led course



Course available via the Lagan Virtual Classroom



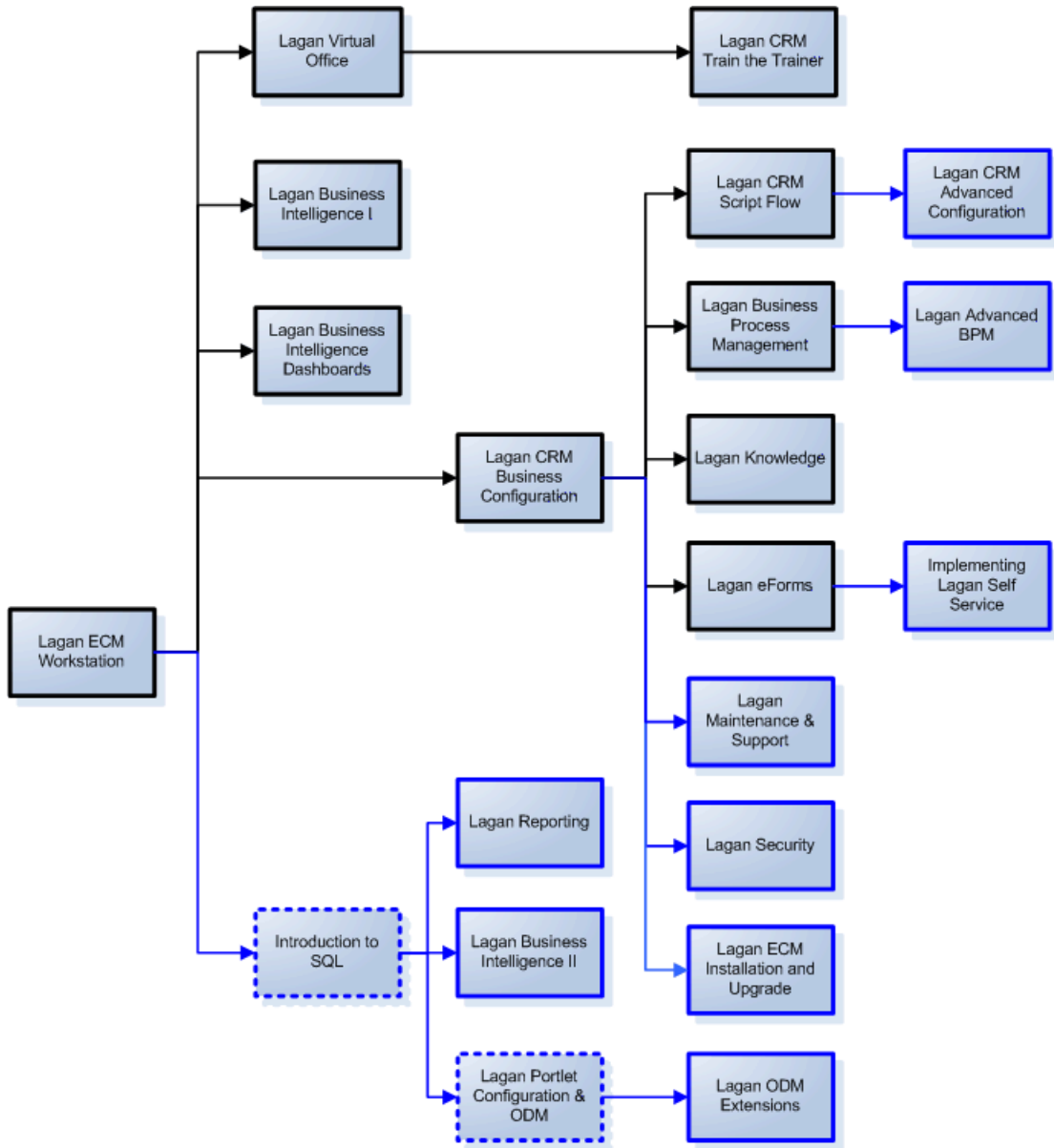
Elearning course i.e. eCourse

You should consult the **Course Dependencies** diagram as well as the **Roles and Skills Matrix** found in this brochure to determine which courses are relevant. Alternatively, you can contact Lagan Education Services by email (training_request@lagan.com) or phone (+44 (0) 28 9078 8300) to discuss your training requirements.

A list of our scheduled public courses is available on our website (www.lagan.com); to register for a course you can email (training_request@lagan.com) or phone us (+44 (0) 28 9078 8300).

Course Dependencies

The diagram below illustrates the sequence in which the training courses must be taken. The organisation should therefore ensure that delegates have attended any pre-requisite courses.



— Courses suitable for technical Staff

— Courses suitable for both business analysts and technical staff; the latter may be required to attend in order to meet the prerequisites defined for technical courses

... (Dotted Line) optional courses. These may be relevant if the delegates need to acquire a specific skill-set to attend a Lagan course i.e. SQL skills for the Lagan Reporting course

Lagan Product Overview

(ECM-PO)



PRE-REQUISITES

None

AUDIENCE

Partners; New Lagan Employees

COURSE OBJECTIVES

The course provides delegates with a comprehensive overview of the Lagan architecture and product components including Knowledge, BPM, SVC, Business Intelligence, eForms, and self service. The course is supplemented with demonstrations and examples of how the product has been implemented at various customer sites. The course is a good starting point for those involved in sales, pre-sales or implementing a Lagan installation.

DURATION

Instructor-led training: 1 day

Virtual classroom: 2 sessions (0.5 days per session)

OVERVIEW

The course comprises of the following modules:

- Lagan ECM Product Portfolio
- Lagan ECM Demonstrations
- Lagan v7 Update
- Knowledge
- eForms and Self Service
- BPM
- SVC
- Business Intelligence
- Integration
- Computer Telephony Integration
- Rules
- ServiceFlow

Lagan ECM Workstation™

(CRM-WS)



PRE-REQUISITES

Computer literate with an understanding of your business processes

AUDIENCE

End-Users (Contact Centre Agents and Supervisors); Business Analysts; Report Writers, Support Engineers; In-House Trainers

COURSE OBJECTIVES

The course provides a high degree of hands-on, intensive training on the Lagan ECM Workstation™ to contact centre agents and supervisors. This is an example-driven course; we are happy to incorporate your own examples, providing they have been discussed with the trainer beforehand and sufficient time has been allocated for the course customisation.

DURATION

Instructor-led training: 1 day

OVERVIEW

The course comprises of the following modules:

- Introducing Lagan ECM™
- Interactions
- Enquiries
- Cases
- Interaction Client
- New Customers
- Letter Templates
- Creating Cases Against Streets
- Updating Cases
- Linking Interactions to Cases
- Updating Records
- Messaging
- Relationships
- Letter Templates
- Searching for Cases
- Linking Cases
- Script Flow
- Case Handling

The course is supplemented with demonstrations and examples and provides the student with extensive hands-on product experience.

Lagan Virtual Office™

(CRM-VO)



PRE-REQUISITES

Computer literate with an understanding of your business processes

AUDIENCE

End Users (Back office workers and supervisors); In-House Trainers

OBJECTIVES

The course provides a high degree of hands-on, intensive training on the Lagan Virtual Office™ application to back office staff. This is an example-driven course; we are happy to incorporate your own examples, providing they have been discussed with the trainer beforehand and sufficient time has been allocated for the course customisation.

DURATION

Instructor-led training: 0.5 days

OVERVIEW

The course comprises of the following modules:

- Introducing Lagan Enterprise Case Management™
- Logging Interactions
- Enquiries & Cases
- New Customers
- Handling Cases

The course is supplemented with demonstrations and provides the student with extensive hands-on experience.

Lagan CRM Train the Trainer

(CRM-TTT)

PRE-REQUISITES

- Lagan ECM Workstation™ (CRM-WS)
- Lagan Virtual Office™ (CRM-VO)



AUDIENCE

In-house trainers or those taking on a training role

OBJECTIVES

The course equips delegates with the knowledge and skills to carry out successful Lagan end-user training (Lagan ECM Workstation and Lagan Virtual Office) in their organisation. It includes topics such as how to facilitate learning for a range of adult learning styles, how to deal with difficult behaviours in the classroom and how to customise the end-user courses for their organisation's business processes.

The Train the Trainer course also provides delegates with a practical opportunity to plan and prepare a short training session on either the Lagan ECM Workstation or Lagan Virtual Office that will then be delivered during the Train the Trainer Certification course.

DURATION

Instructor-led training: 2 days

OVERVIEW

The course comprises of the following modules:

- Theory
 - What is Training?
 - Learning Styles
- Preparation
 - Customising the Courseware
 - Structuring the Training Session
 - Setting Learning Objectives
 - Learning Methods
 - Review and Summary Techniques
 - Writing a Training Script
- Delivery
 - Starting up a Training Course
 - Using Questions
 - Visual Aids
 - Difficult Delegates

- Drawing the Course to a Close
- Presentation Skills
- Evaluation
 - Evaluating the Learning: The 4 Levels
- Activity Bank
 - Ice-breakers
 - Energisers
 - Games

WHERE TO NEXT

Lagan CRM Train the Trainer Certification

Lagan CRM Train the Trainer Certification

(CRM-TTT-CERT)



PRE-REQUISITES

- Lagan ECM Workstation™ (CRM-WS)
- Lagan Virtual Office™ (CRM-VO)
- Lagan Train the Trainer (CRM-TTT) OR excellent presentation and communication skills

AUDIENCE

In-house trainers

OBJECTIVES

The Lagan CRM Train the Trainer Certification course is designed to certify that delegates have the required skills and knowledge to deliver Lagan end-user training. It also provides delegates with the opportunity to review and strengthen their product knowledge before delivering their own training to end-users.

DURATION

Instructor-led training: 1 day

OVERVIEW

In the morning session delegates will learn how to configure key business components of Lagan ECM such as groups and user accounts thereby enabling them to manage and maintain the training environment.

In the afternoon session, delegates are expected to demonstrate their product knowledge by delivering a short presentation (10 to 15 minutes) on any aspect of the Lagan ECM Workstation or Virtual Office applications i.e. case handling, logging interactions, setting the interaction client, etc to establish that their level of product knowledge is appropriate. The preparation and planning for the presentation should take place prior to this session.

Lagan CRM Business Configuration

(CRM-BC)



PRE-REQUISITES

- Lagan ECM Workstation™ (CRM-WS)
- General IT and business skills

AUDIENCE

Business Analysts; Support Engineers, Technical Configurators; System Integrators

OBJECTIVES

The course focuses on developing the skills necessary to configure and develop the Lagan ECM system using the Lagan Configuration Studio. It provides a high degree of intensive, hands-on product experience.

DURATION

Instructor-led training: 2 days

Virtual classroom: 3 sessions (0.5 days per session)

OVERVIEW:

The course comprises of the following modules:

- Introducing Lagan Enterprise Case Management™
- Configuring User Accounts & Privileges
- Defining Work Queues
- Creating Classifications
- Configuring Cases Attributes
- Tasks and Escalation Rules
- Client Notifications
- Correspondence
- Case Study

Lagan CRM Script Flow

(CRM-SF)



PRE-REQUISITES

Lagan CRM Business Configuration (CRM-BC)

AUDIENCE

Business Analysts; Support Engineers

OBJECTIVES

This course is designed for users that will have responsibility for script design and content for the call centre and face to face operators of the Lagan ECM system

DURATION

Instructor-led training: 2 days

Virtual classroom: 3 sessions (0.5 days per session)

OVERVIEW

The course comprises of the following modules:

- Introduction to Script Flow
- Designing and Building a Script Flow
 - Navigating the design screen
 - Submitting & Saving a Script Flow
 - Testing a Script Flow
- Script Flow Nodes
 - Adding and Linking Script Flow Nodes
 - Associating a Script Flow with an event
 - Running a Script Flow within the Lagan ECM Workstation
- Case Study
 - Provides delegates with the opportunity to put into practice the skills they have learnt during the 2 days

Lagan Business Process Management (BPM)

(ECM-BPM)



PREREQUISITES

Lagan CRM Business Configuration (CRM-BC)

AUDIENCE

Business Analysts; Technical Configurators; Support Engineers; System Integrators

OBJECTIVES

To become familiar with the Lagan BPM interface and terminology; to configure complex business process maps; and to implement the solution's key functionality such as exception management, advanced resource configuration and SLA and cost monitoring

DURATION

Instructor-led training: 3 days

OVERVIEW

The course comprises of the following modules:

- Lagan Business Process Management (BPM) – What's it all about?
- Getting Started: Introducing the Integrated Design Environment (IDE)
- Pulling it all Together
- Formatting Output Variables
- Building Advanced Business Process Maps
- State Management
- Categories; Documentation; Import and Export
- Work Queue Definitions
- Service Standards & Milestones
- Advanced Workflow
- Roles
- Activity Notifications
- Nested Maps and Sub Jobs
- Security and Job Scheduler
- Event & Exception Handling
- Administrative Suite

Lagan Advanced BPM

(ECM-ABPM)



PREREQUISITES

- Lagan CRM Business Configuration (CRM-BC)
- Lagan Business Process Management (ECM-BPM)
- An awareness of the following technologies: web services, XML, COM, VBScript, SQL

AUDIENCE

Technical Configurators; Support Engineers; System Integrators

OBJECTIVES

The course builds upon the knowledge and skills attained from the Lagan BPM course; specifically it looks at the technical and integration capabilities of the solution such as using web services, XML integration, COM objects and script activities

DURATION

Instructor-led training: 1 day

OVERVIEW

The course comprises of the following modules:

- Introduction to the Developer Tools
- Script Activities
- XML Integration
- Web Service Activities
- Dynamic Resource Allocation
- Data Access Service Activity
- Using Lagan eForms

Lagan Knowledge

(ECM-KN)



PRE-REQUISITES

- Lagan CRM Business Configuration (CRM-BC)
- Lagan ECM Workstation (CRM-WS) OR experience of Lagan ECM in the Workplace
- Lagan eForms (ECM-EF) - recommended but not essential

AUDIENCE

Business Analysts; Support Engineers

OBJECTIVES

This 2-day course provides delegates with the skills to design and build a knowledge management solution using Lagan Knowledge. Delegates will learn how to structure communities of knowledge and how to build out these communities with website pages, documents stored on file servers, and simple content via Lagan cases. The course will then explore how to secure your knowledge or solution documents so that only certain groups of users have access to specific documents and/or communities of knowledge. Delegates will also learn how to maintain the system using tools such as the document browser, the question browser, and the vocabulary maintenance screen. The course includes a case study that aims to cement the skills and knowledge learnt during the course presentations and exercises.

DURATION

Instructor-led training: 2 days

Virtual classroom: 2 sessions (0.5 days per session)

OVERVIEW

The course comprises of the following modules:

- Introducing Lagan Knowledge
- Structuring Knowledge and Other Considerations
- Getting Started – Adding Knowledge
 - Web Sites and File Locations
 - Lagan Authored Solutions
 - KnowledgeLoader Tool
- Knowledge Search
 - Knowledge Search Demonstration
 - Configuring Knowledge Search
 - Solution Not Found? Defining an Escalation Process

- Maintaining your Knowledge
- Securing Knowledge
- Administrator Access
- Other Useful Features

Lagan Maintenance & Support

(ECM-MS)



PRE-REQUISITES

- Lagan CRM Business Configuration (CRM-BC) OR experience of Lagan ECM in the work place
- General IT skills

AUDIENCE

Support Engineers and those responsible for maintaining the Lagan ECM system

OBJECTIVES

The course aims to provide delegates with the skills and knowledge to support and maintain the Lagan ECM system

DURATION

Instructor-led training: 1 day

Virtual classroom: 2 sessions (0.5 days per session)

OVERVIEW

The course comprises of the following modules:

- Lagan ECM Architecture
- Exploring Lagan Home
 - Properties Files
 - Logging
 - Menu & Standard Toolbar
- Operational Tools
- Auditing
- Contacting Lagan Support

Lagan ECM Installation and Upgrade

(ECM-INST)



PRE-REQUISITES

- Lagan CRM Business Configuration (CRM-BC)
- General IT technical and database administrator skills
- An understanding of web technologies

AUDIENCE

Technical Configurators; Support Engineers

OBJECTIVES

The course aims to provide delegates with the knowledge to undertake a Lagan installation and/or upgrade. It also provides a high-level overview of the configuration required to certify the installation.

DURATION

Instructor-led training: 1 day

OVERVIEW

The following topics will be covered:

- Introduction to the Lagan ECM system
- System components
- Lagan System Architecture
- Installation hardware and software prerequisites
- Installing and Configuring Lagan ECM
- The Quick Installation Wizard
- Certifying that the install was successful
- Upgrading to a later version

Lagan CRM Advanced Configuration

(CRM-AC)



PRE-REQUISITES

- Lagan CRM Business Configuration (CRM-BC)
- Lagan CRM Script Flow (CRM-SF)
- Database design and basic SQL skills are beneficial

AUDIENCE

- Technical Configurators; Support Engineers
- Business Analysts may also find this course relevant as it emphasises the scripting, business rules, and email capabilities of Lagan ECM; however these delegates should have a basic understanding of technical concepts

OBJECTIVES

This course aims to enhance the product knowledge and skills delegates attained from the Business Configuration and Script Flow courses. It examines Lagan ECM's out-of-the-box integration capabilities, for example with Microsoft Word, external databases, email servers, and web applications.

DURATION

Instructor-led training: 1 day

Virtual classroom: 2 sessions (0.5 days per session)

OVERVIEW

The course comprises of the following modules:

- Retrieving Dynamic Data
- Creating Business Rules
- Letter and Email Templates
- Email Server Integration
- Customising Toolbars and Menus
- Advanced Script Flow Functionality
- Other Useful Features

Lagan eForms

(ECM-EF)



PRE-REQUISITES

- Lagan CRM Business Configuration (CRM-BC)
- knowledge of XML is beneficial

AUDIENCE

Business Analysts; Technical Configurators; System Integrators; Support Engineers

OBJECTIVES

The course provides delegates with the skills and knowledge to build Lagan eForms and implement complex functionality such as branching, disable rules and string arithmetic.

DURATION

Instructor-led training: 2 days

Virtual classroom: 3 sessions (0.5 days per session)

OVERVIEW

The course comprises of the following modules:

- Introducing the eForm Builder
- Adding Page Elements
- Adding Logic to eForms
- eForm Buttons and Actions
- Advanced Field Elements
- Associating an eForm with a Process Definition and Auto Population
- eForm Design Guidelines
- Case Study

Lagan Security

(ECM-SEC)



PRE-REQUISITES

- Lagan ECM Workstation (CRM-WS) OR experience of Lagan ECM in the workplace
- Lagan CRM Business Configuration (CRM-BC)
- Database design and SQL skills OR Introduction to SQL (LAGAN-SQL)

AUDIENCE

Technical Configurators; Support Engineers

OBJECTIVES

The course examines Lagan ECM's security architecture and features including how to assign permissions to a user and/or groups of users, how to restrict access to specific data, and how to define which case classifications are available to a user and/or group of users.

DURATION

Instructor-led training: 1 day

OVERVIEW

The course provides extensive hands-on experience in configuring Lagan ECM to match specific security requirements. Delegates will define permissions/privileges for groups of users, configure what data will be displayed within the Search, Contact History, Case Search, and Current Details screens, as well as define which classifications will be presented to a user / group of users when creating a Lagan case.

The course comprises of the following modules:

- Lagan Security – An Overview
- Authorisation Mechanisms
 - Functional Security
 - Create Case Security
 - Data Access Security
- Authentication Mechanisms

Lagan Portlet Configuration & ODM

(ECM-POC)



PRE-REQUISITES

- Lagan ECM Workstation (CRM-WS) OR experience of Lagan ECM in the Workplace
- Database design and SQL skills OR Introduction to SQL (Lagan-SQL)

AUDIENCE

Technical Configurators; Support Engineers

OBJECTIVES

The course introduces the Lagan Object Data Model (ODM) and equips delegates with the knowledge and skills to configure portlets within the Lagan ECM Workstation and Lagan Virtual Office.

DURATION

Instructor-led training: 2 days

Virtual classroom: 2 sessions (0.5 days per session)

OVERVIEW

The Portlet Configuration and ODM course introduces the Lagan Object Data Model (ODM) and the concepts of 'portlets' and 'perspectives'. Specifically you'll explore how to modify the display of party (i.e. an individual or an organization) and property object data, within the Lagan ECM Workstation and Lagan Virtual Office, by configuring new perspectives and portlets for the Current Details screen. You'll also learn how to modify the object data displayed within the Brief Details panel of the Lagan ECM Workstation, and how to design and build a new Object Creation Wizard. Finally the course will examine how to adapt the fields of an existing ODM object to display data that is currently not available.

The course comprises of the following modules:

- Introducing Portlets
- Configuring Portlets
- Tabular Views
- Object Creation Wizard
- Object Data Model
- Configuring the Brief Details Panel

Lagan ODM Extensions

(ECM-ODM)



PRE-REQUISITES

- Lagan ECM Workstation (CRM-WS) OR experience of Lagan ECM in the Workplace
 - Database design and SQL skills OR Introduction to SQL (Lagan-SQL)
 - Lagan Portlet Configuration and ODM (ECM-POC) - only recommended if you intend to display object data via portlets
- OR
- Lagan eForms (ECM-EF) OR experience of designing Lagan eForms - only recommended if you intend to display object data within eForms

AUDIENCE

Technical Configurators; Support Engineers

OBJECTIVES

This course expands upon the knowledge and skills attained from the Lagan Portlet Configuration and ODM course. It explores how to configure/create new object types that will be available within Lagan ECM Workstation and Lagan Virtual Office.

DURATION

Instructor-led training: 2 days

OVERVIEW

Delegates will learn how to create new object types within Lagan ECM, how to configure the search facility for these new object types, and how to define relationships between objects. The new object type data can be viewed through the brief details, current details and creation wizard portlets within the Lagan ECM Workstation. This course also explores how objects can be viewed within eForms. Current ODM objects can also be extended to include fields that are not currently available.

The course comprises of the following modules:

- Perspectives and Portlets
- New ODM Object Types
- Search Configuration
- Object Attributes
- Relationship Information

Implementing Lagan Self Service

(ECM-SS)



PRE-REQUISITES

- Understanding of XML/XSLT
- Lagan ECM Workstation (CRM-WS) OR experience of Lagan ECM in the Workplace
- Lagan eForms (ECM-EF)

AUDIENCE

System Integrators; Support Engineers

OBJECTIVES

This hands-on course provides delegates with the skills and knowledge to deploy the Lagan Self Service toolkit within their organisation. Delegates will be given an introduction to web services and an in-depth explanation of the available Lagan web services. They'll learn how to use the Lagan WSDL to create web service calls as well as how to generate, test, and diagnose problems with web service calls using tools such as SoapUI and TCPTrace. The second day will involve a case study where delegates will work at their own pace, to construct exemplar web pages that enable customers to create a Self Service account, request a bulky waste collection, report a pothole, and track the progress of an outstanding case.*

DURATION

Instructor-led training: 2 days

Virtual classroom: 3 sessions (0.5 days per session)

OVERVIEW

The course comprises of the following modules:

- Introducing Lagan Self Service
- Introduction to Lagan Web Services and WDSL
- Implementing Security
- SoapUI and eForms
- Managing Returning Data
- Tracking Utility
- Debugging

Lagan Reporting

(ECM-SP)



PRE-REQUISITES

- Lagan ECM Workstation (CRM-WS) OR experience of Lagan ECM in the workplace
- Introduction to SQL (LAGAN-SQL) OR strong SQL skills that includes experience of writing complex SELECT statements that include aggregate functions, inner and outer joins, (correlated) sub queries, and GROUP BY clauses

AUDIENCE

Report Writers; Support Engineers; Technical Configurators

OBJECTIVES

This hands-on course explores the Lagan Reporting Schema and how to use this to produce operational and strategic reports. Delegates will, by the end of the day, have built up a library of reports including reports that illustrate case queue volumes, case handling times, user workloads, interaction volumes per party, interaction volumes per channel, etc; these can then be deployed, if appropriate, within their organisation.

DURATION

Instructor-led training: 1 day

Virtual classroom: 2 sessions (0.5 days per session)

OVERVIEW

The course comprises of the following modules:

- Reporting Architecture
- Report Building Process
- Reporting on Forms and eForms
- Other Tables

The course is supplemented with demonstrations and provides the student with extensive hands-on experience.

Lagan Business Intelligence I: Fundamentals of Report Design

(ECM-BI-01)



PRE-REQUISITES

Lagan ECM Workstation (CRM-WS) OR experience of Lagan ECM in the workplace

AUDIENCE

Business Analysts; Support Engineers, Report Writers

OBJECTIVES

The course explores Lagan's Business Intelligence (BI) offering including how to run the template reports provided with the solution and how to design and author ad hoc reports using the Report Builder interface

DURATION

Instructor-led training: 1 day

OVERVIEW

The course comprises of the following modules:

- BI Components
- Introducing the Report Manager
- Report Delivery
- Authoring Ad Hoc Reports
 - Navigating the Report Builder
 - Creating tabular, matrix and chart reports
 - Applying Filters
 - Grouping and Sorting Data
 - Creating Reports with Parameters
- Reporting Tools Compared
- Linked Reports

Lagan Business Intelligence II: Advanced Reporting

(ECM-BI-02)



PRE-REQUISITES

- Lagan ECM Workstation (CRM-WS) OR experience of Lagan ECM in the Workplace
- Lagan Business Intelligence I: Fundamentals of Report Design (recommended but not essential) (ECM-BI-01)
- Introduction to SQL (LAGAN-SQL) OR strong SQL skills that includes experience of writing complex SELECT statements that contain aggregate functions, inner and outer joins, (correlated) sub queries, GROUP BY clauses, and the UNION command
- Previous experience of report development including requirements capture and design

AUDIENCE

Report Writers; Technical Configurators; Support Engineers

OBJECTIVES

The course enhances the knowledge and skills acquired from the course, Business Intelligence I: Fundamentals of Report Design. It explores the BI architecture, the reporting schema, and the Report Designer interface. Delegates will use the reporting schema to write SQL queries to retrieve specific data from the Lagan ECM database. They will then be introduced to the Report Designer interface in which they can design the actual layout of the report and include functionality such parameters, drill-down, and drill-through. They'll then explore the various delivery options and examine how security can be applied to the report. The course also illustrates how to write reports that include eForm and/or case form data.

DURATION

Instructor-led training: 3 days

OVERVIEW

The course comprises of the following modules:

- Business Intelligence Architecture and Online Documentation
- Writing the Report SQL
- Report Lifecycle
- Authoring Reports
- Deploying and Delivering Reports
- Securing Reports

Lagan Business Intelligence Dashboards

(ECM-BI-003)



PRE-REQUISITES

Lagan ECM Workstation (CRM-WS) OR experience of Lagan ECM in the Workplace

AUDIENCE

Business Analysts; Report Writers

OBJECTIVES

The course explores what dashboards are, how these can be used to improve your business, and how to customise and create new dashboards

DURATION

Instructor-led training: 1 day

OVERVIEW

The course comprises of the following topics:

- What are Dashboards?
- Dashboard Data Structure
- Advanced View Editing
- Dashboard Chart Types
- Setting & Monitoring Thresholds
- Collaboration Features
- Case Study

Introduction to SQL

(LAGAN-SQL)



PRE-REQUISITES

No prior SQL training or relational database experience is assumed; however it is beneficial to have an understanding of basic database principles

AUDIENCE

Support Engineers, Technical Configurators, Report Writers, IT Professionals

OBJECTIVES

The course provides delegates with the skills and knowledge necessary to write simple through to complex SQL queries. It is therefore of benefit to individuals with no SQL experience or those with limited experience wanting to enhance their skills in navigating the database and writing more complex queries. The course is supplemented with extensive hands-on exercises.

DURATION

Instructor-led training: 3 days

OVERVIEW

The following topics will be covered:

- RDBMS and Normalisation
- What is SQL?
- SQL DML SELECT
- Scalar and Aggregate Functions
- Advanced SELECT statement Components
- Joining Tables
- Sub Queries
- Set Operators
- DML – INSERT, UPDATE, DELETE
- DDL and DCL Statements
- Inline Views
- Performance

Roles and Skills Matrix

This section details which Lagan training courses are relevant to specific job roles that may exist within an organisation. It should be noted that these are only guidelines and that the exact courses an individual should attend will be determined by the functions and role(s) they will perform in implementing and maintaining the Lagan solution. If required, Lagan can conduct a training needs analysis to identify appropriate courses for individuals.

End Users

These individuals use the Lagan ECM Workstation or Lagan Virtual Office to handle customer interactions via the phone, email, fax etc and/or to process Lagan cases.

GENERAL SKILLS

They should be computer literate and have a basic understanding of the organisation's processes.

SUGGESTED COURSES

End-users can be broadly divided into two groups: (1) front-office workers i.e. those individuals working in the contact centre dealing with customers and (2) back-office workers i.e. those individuals who work in the various departments.

The table below lists the suggested course for front-office workers and their supervisors.

| Code | Course Title | Duration |
|--------|-----------------------------------|----------|
| CRM-WS | Lagan ECM Workstation (Lagan EWS) | 1 |

The following table details the suggested course for back-office or departmental staff.

| Code | Course Title | Duration |
|--------|---------------------------------|----------|
| CRM-VO | Lagan Virtual Office (Lagan VO) | 0.5 |

In-House Trainers

These are individuals that design and deliver in-house training to employees. The suggested courses ensure that they have the skills and knowledge to deliver Lagan ECM end-user training to contact centre agents and supervisors.

GENERAL SKILLS

- Strong presentation skills
- Computer literate
- Knowledge of the organisation's processes
- Experience of delivering IT courses on a one-to-one basis or to small groups of individuals

SUGGESTED COURSES

| Code | Course Title | Duration |
|--------------|---|----------|
| CRM-WS | Lagan ECM Workstation (Lagan EWS) | 1 |
| CRM-VO | Lagan Virtual Office (Lagan VO) | 0.5 |
| CRM-TTT- | Lagan CRM Train the Trainer | 2 |
| CRM-TTT-CERT | Lagan CRM Train the Trainer Certification | 1 |

Business Analysts

These individuals are responsible for mapping the organisation's business processes and then configuring these within the Lagan ECM system.

GENERAL SKILLS

They should have a broad understanding of Customer Relationship Management (CRM) and have some experience of Business Process Re-Engineering (BPR) and process mapping.

SUGGESTED COURSES

| Code | Course Title | Duration |
|---------|---|----------|
| CRM-WS | Lagan ECM Workstation (Lagan EWS) | 1 |
| CRM-BC | Lagan CRM Business Configuration | 2 |
| CRM-SF | Lagan CRM Script Flow | 2 |
| ECM-EF | Lagan eForms | 2 |
| ECM-BPM | Lagan Business Process Management (BPM) | 3 |

| Code | Course Title | Duration |
|-----------|--|----------|
| ECM-KN | Lagan Knowledge | 2 |
| ECM-BI-01 | Lagan Business Intelligence I: Fundamentals of Report Design | 1 |
| ECM-BI-03 | Lagan Business Intelligence Dashboards | 1 |

Support Engineers

These are individuals within the organisation that will provide in-house support and assistance to end-users when issues arise. They will also be responsible for the maintenance and management of the overall Lagan ECM system. As such they will require a broad and extensive knowledge of the Lagan ECM system.

GENERAL SKILLS

Typically these individuals will already perform a customer support role and should have strong technical skills including database and SQL skills, knowledge of XML and of web services.

SUGGESTED COURSES

| Code | Course Title | Duration |
|-----------|---|----------|
| CRM-WS | Lagan ECM Workstation (Lagan EWS) | 1 |
| CRM-BC | Lagan CRM Business Configuration | 2 |
| CRM-SF | Lagan CRM Script Flow | 2 |
| CRM-AC | Lagan CRM Advanced Configuration | 1 |
| ECM-EF | Lagan eForms | 2 |
| ECM-MS | Lagan Maintenance and Support | 1 |
| ECM-POC | Lagan Portlet Configuration and ODM | 2 |
| ECM-ODM | Lagan ODM Extensions | 2 |
| ECM-INST | Lagan ECM Installation and Upgrade | 1 |
| ECM-BPM | Lagan Business Process Management (BPM) | 3 |
| ECM-ABPM | Lagan Advanced BPM | 1 |
| ECM-KN | Lagan Knowledge | 2 |
| LAGAN-SQL | Introduction to SQL* | 3 |

* The Introduction to SQL course is NOT required if the individual has experience of writing complex SQL queries.

| Code | Course Title | Duration |
|-----------|--|----------|
| ECM-SP | Lagan Reporting* | 1 |
| ECM-BI-01 | Lagan Business Intelligence I: Fundamentals of Report Design | 1 |
| ECM-BI-02 | Lagan Business Intelligence II: Advanced Reporting | 3 |
| ECM-SS | Implementing Lagan Self Service | 2 |
| ECM-SEC | Lagan Security | 1 |

Technical Configurators

These are individuals who will be responsible for implementing the technical aspects of Lagan ECM including email server configuration, extraction of data from the Lagan ECM database or external databases, configuration of user screens (i.e. portlets), implementation of security policies, and configuration of eForms.

GENERAL SKILLS

They should be technical experts with SQL skills, knowledge of database stored procedures, and web services, and familiar with writing XML.

SUGGESTED COURSES

| Code | Course Title | Duration |
|-----------|---|----------|
| CRM-BC | Lagan CRM Business Configuration | 2 |
| CRM-SF | Lagan CRM Script Flow | 2 |
| CRM-AC | Lagan CRM Advanced Configuration | 1 |
| ECM-EF | Lagan eForms | 2 |
| ECM-SEC | Lagan Security | 1 |
| ECM-POC | Lagan Portlet Configuration and ODM | 2 |
| ECM-ODM | Lagan ODM Extensions | 2 |
| ECM-BPM | Lagan Business Process Management (BPM) | 3 |
| ECM-ABPM | Lagan Advanced BPM | 1 |
| ECM-MS | Lagan Maintenance and Support | 1 |
| LAGAN-SQL | Introduction to SQL* | 3 |

* The Lagan Reporting course is NOT required if the Lagan Business Intelligence solution has been purchased.

| Code | Course Title | Duration |
|-----------|--|----------|
| ECM-SP | Lagan Reporting [†] | 1 |
| ECM-BI-02 | Lagan Business Intelligence II: Advanced Reporting | 3 |
| ECM-INST | Lagan ECM Installation and Upgrade | 1 |

System Integrators

These individuals should be experienced technical developers who are responsible for integrating Lagan ECM with external applications.

GENERAL SKILLS

- Knowledge of XSLT and XPath
- XML skills
- Knowledge of web technologies

SUGGESTED COURSES

| Code | Course Title | Duration |
|----------|---|----------|
| CRM-BC | Lagan CRM Business Configuration | 2 |
| ECM-EF | Lagan eForms | 2 |
| ECM-SS | Implementing Lagan Self Service | 2 |
| ECM-BPM | Lagan Business Process Management (BPM) | 3 |
| ECM-ABPM | Lagan Advanced BPM | 1 |

* Introduction to SQL is NOT required if the individual has experience of writing complex SQL queries.

[†] The Lagan Reporting course is NOT required if the Lagan Business Intelligence solution has been purchased.

Report Writers

These are individuals responsible for designing and producing complex operational and MIS reports.

GENERAL SKILLS

Strong knowledge and experience of writing SQL queries

SUGGESTED COURSES

| Code | Course Title | Duration |
|-------------|--|-----------------|
| CRM-WS | Lagan ECM Workstation (Lagan EWS) | 1 |
| LAGAN-SQL | Introduction to SQL [*] | 3 |
| ECM-SP | Lagan Reporting [†] | 1 |
| ECM-BI-01 | Lagan Business Intelligence I: Fundamentals of Report Design | 1 |
| ECM-BI-03 | Lagan Business Intelligence Dashboards | 1 |
| ECM-BI-02 | Lagan Business Intelligence II: Advanced Reporting | 3 |

^{*} This course is NOT required if the individual has experience of writing complex SQL queries.

[†] The Lagan Reporting course is NOT required if the Lagan Business Intelligence solution has been purchased.

