About ClickSoftware Customer Training Services

ClickSoftware Customer Training Services provides a wide range of practical courses to support ClickSoftware's professionals and users. Courses are offered via eLearning, on-site at your own premises, or in one of our dedicated training centers. The training provides deep understanding of both theoretical and practical knowledge required to implement, administrate and use ClickSoftware's products.

**eLearning**

eLearning, or self-paced learning, is built using a state of the art online learning system which offers participants an effective and seamless training experience. This features, for some of the courses, a practice environment that can be used for learning purposes.

**Classroom**

Classroom courses are tailored for those participants that prefer to attend training sessions led by a trainer. These courses are tailored for different types of users, from dispatchers, systems administrators and implementation teams to developers.

ClickSoftware's professional trainers ensure that you and your team are fully equipped to get the most out of your technological investment.

For additional information contact: Training@clicksoftware.com

ClickSoftware goes a long way to make sure that customers receive the training and education necessary to carry out their implementations and projects with excellence. We offer a variety of activities and courses to help you master the technology and become proficient in this field.

ClickSoftware Training Store

Check our training store. Some of the eLearning courses are available for online purchase through our store:

https://store.clicksoftware.com
# eLearning Courses

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ClickSchedule for Dispatchers (#102)

Course Description:
This course is meant to teach Dispatchers how to utilize the ClickSchedule Web Client. The participants will learn about the scheduling challenges and ClickSchedule solution. In addition, the Dispatchers will learn how to perform their daily work in the system and how to handle exceptions in the schedule.

Course Objectives:
By the end of this course the trainees will be able to:
- Describe the scheduling challenges and ClickSchedule solution
- Describe the different scheduling options in the system
- Manage the daily schedule and handle exceptions
- Manage tasks and handle resources availabilities

Pre-Requisites:
None

Training method:
Classroom

Duration:
1 day

ClickSchedule for Administrators (#202e)

Course Description:
This course provides deep understanding of the Service Optimization suite as well as the ClickSchedule product from business, UI and administration points of view.

Course Objectives:
By the end of this course the trainees will be able to:
- Describe the scheduling challenges and ClickSchedule solution
- Describe the Service Optimization architecture
- Describe and configure the Service Optimization data model
- Perform basic functionalities in ClickSchedule client
- Define and modify users in the ClickSchedule implementation
- Configure the user environment
- Troubleshoot

Pre-Requisites:
None

Training method:
eLearning

Duration:
Estimated 15-20 hours
ClickSchedule for Cloud Administrators (#222e)

Course Description:
This course utilizes ClickSoftware's online eLearning system, which offers participants a self-learning, self-paced training experience. The training features scenario based learning as well as hands-on practice in the training environment.

Course Objectives:
By the end of this course the trainees will be able to:
▪ Describe the scheduling challenges and the ClickSchedule solution
▪ Perform basic functions in the client
▪ Add functionalities to the solution with the Configuration Installer and use the Import Tool to import/export data to the system
▪ Customize the system UI by configuring Client User Settings
▪ Manage users and user profiles with the User Management Tool and the Cloud Identity Manager (IDM)
▪ Configure the ServiceOptimization Data Scheme
▪ Configure system forms using the Form Editor
▪ Configure System Agents
▪ Monitor the system with the Cloud Services Dashboard
▪ Describe the ServiceOptimization Suite architecture

Pre-Requisites:
None

Training method:
eLearning

Duration:
Estimated 15-20 hours
ClickSchedule Technical Product Training (#201/#201e)

Course Description:
This course provides deep understanding of the Service Optimization suite as well as the ClickSchedule product from business, UI, administration and configuration points of view.

Course Objectives:
By the end of this course the trainees will be able to:
▪ Describe the scheduling challenges and ClickSchedule solution
▪ Describe the client interface and perform basic functions in the client
▪ Describe advanced scheduling options
▪ Configure client user settings and forms
▪ Configure the ServiceOptimization Data Scheme
▪ Configure the Status Flow Diagram for tasks
▪ Configure scheduling policies and basic logic
▪ Describe the GIS solution and configure basic GIS settings
▪ Configure system Agents
▪ Configure system Events
▪ Describe ServiceOptimization Suite architecture
▪ Configure integration settings

Pre-Requisites: None
Training method: eLearning
Duration: estimated 25-30 hours

ClickSchedule Technical Product Training and Troubleshooting 101 (#802/#802e)

Course Description:
This course provides the essential knowledge required to take part in ClickSchedule configuration. In addition, it also provides the knowledge needed in supporting basic product issues. Adhering to the course requirements and passing the exams will entitle participants to submit cases to the support team.

Course Objectives:
By the end of this course the trainees will be able to:
▪ Describe the scheduling challenges and ClickSchedule solution
▪ Describe the client interface and perform basic functions in the client
▪ Describe advanced scheduling options
▪ Configure client user settings and forms
▪ Configure the ServiceOptimization Data Scheme
▪ Configure the Status Flow Diagram for tasks
▪ Configure scheduling policies and basic logic
▪ Describe the GIS solution and configure basic GIS settings
▪ Configure system Agents and system events
▪ Describe ServiceOptimization Suite architecture
▪ Configure integration settings
▪ Identify the root cause of common problems
▪ Resolve basic issues and Open support cases

Pre-Requisites: None
Training method: eLearning (#802e)
Duration: estimated 30 - 35 hours
ClickSchedule Technical Product Training for Cloud Implementations (#811e)

Course Description:
This course provides the essential knowledge required to take part in ClickSchedule configuration. In addition, it also provides the knowledge needed in supporting basic product issues. Adhering to the course requirements and passing the exams will entitle participants to submit cases to the support team.

Course Objectives:
By the end of this course the trainees will be able to:
- Describe the scheduling challenges and the solution
- Perform basic functions in the client
- Use the Configuration Installer and the Import Tool
- Customize the system UI by configuring Client User Settings
- Manage users and user profiles with different tools
- Configure the ServiceOptimization Data Scheme and system forms
- Configure the Status Flow Diagram for tasks
- Configure scheduling policies and basic logic
- Describe the GIS solution
- Configure System Agents and System Events
- Describe the ServiceOptimization Suite architecture
- Configure the system for integration to external systems
- Monitor the system with the Cloud Services Dashboard
- Identify the root cause of common problems
- Resolve basic issues and Open support cases

Pre-Requisites: None
Training method: eLearning
Duration: estimated 30 - 35 hours
ClickSchedule for Developers (#220)

Course Description:
This course will enable the trainee (programmer) to develop ClickSchedule customizations effectively using the product API.

Course Objectives:
By the end of this course the trainees will be able to:
▪ Describe the structure of ClickSchedule
▪ Access the ClickSchedule data using server side and client side components
▪ Write client add-ins
▪ Integrate ClickSchedule with other systems
▪ Write custom SXP messages
▪ Expose web services and write server events

Pre-Requisites:
Minimum 1 year experience in the following:
- Windows 2008
- Programming in Visual Studio 2010
- Programming in C# (Preferred) or Visual Basic .Net
- XML
- Programming in Silverlight
- web-services knowledge

E-Learning courses:
- ClickSchedule Technical Product Training (course #201e)

For Partners only:
- Associate Consultant ClickSchedule (ACS) certification

Training method: Classroom
Duration: 5 days

ClickSchedule Insights into Logic Services (#221)

Course Description:
This course provides deep understanding of various logic concepts and solutions. The participants will learn how to give logic solutions to various standard business scenarios by configuring ClickSchedule logic components.

Course Objectives:
By the end of this course the trainees will be able to:
▪ Explain logic solutions to various standard business scenarios, as presented in ClickSchedule
▪ Identify logic services that are part of standard logic solutions, provide best practices for each one of them and related limitations that require further consultancy
▪ Perform standard configuration of selected ClickSchedule logic components

Pre-Requisites:
- Course #201/201e - ClickSchedule Technical Product Training
  For Partners only:
  - Associate Consultant ClickSchedule (ACS) certification

Training method: Classroom
Duration: 5 days
**ClickMobile Touch for Engineers (#107t)**

**Course Description:**

This course provides understanding of the purpose and content of the ClickMobile Touch product. During this course, the trainees will learn and practice how to manage assignments and view related information.

**Course Objectives:**

By the end of this course the trainees will be able to:

- Handle ClickMobile Touch assignments
- Handle ClickMobile Touch messages
- Work with ClickMobile Touch Timesheets

**Pre-Requisites:** None

**Training method:** Classroom

**Duration:** 4.5 hours

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**ClickMobile Touch Technical Product Training (#207e)**

**Course Description:**

The ClickMobile Technical Product Training course provides fundamental understanding of both theoretical and practical ClickMobile configuration knowledge that is required for ClickMobile implementations.

**Course Objectives:**

By the end of this course the trainees will be able to:

- Describe the ClickMobile solution
- Describe ClickMobile’s architecture
- Install and set up ClickMobile
- Create and configure user templates and forms
- Install ClickAppStore applications
- Describe the functionally of ClickMobile Classic

**Pre-Requisites:** None

**Training method:** eLearning

**Duration:** estimated 15-20 hours
**ClickMobile Touch Technical Product Training and Troubleshooting 101 (#807e)**

**Course Description:**
This course provides the essential knowledge required to take part in ClickMobile configuration. In addition, it also provides the knowledge needed in supporting basic product issues. Adhering to the course requirements and passing the exams will entitle participants to submit cases to the support team.

**Course Objectives:**
By the end of this course the trainees will be able to:
- Describe the ClickMobile solution
- Describe ClickMobile's architecture
- Install and set up ClickMobile
- Create and configure user templates and forms
- Install ClickAppStore applications
- Describe the functionality of ClickMobile Classic
- Identify the root cause of common problems
- Search the support knowledge base
- Resolve basic issues
- Open a new case

**Pre-Requisites:** None

**Training method:** eLearning

**Duration:** estimated 15-20 hours

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**ClickMobile Touch Technical Product Training for Cloud Implementations (#817e)**

**Course Description:**
The ClickMobile Technical Product Training course provides fundamental understanding of both theoretical and practical ClickMobile configuration knowledge that is required for ClickMobile cloud implementations.

**Course Objectives:**
By the end of this course the trainees will be able to:
- Describe the ClickMobile solution
- Describe ClickMobile architecture
- Create and configure forms
- Configure ClickMobile UI and behavior by using the ClickMobile studio
- Perform Basic configuration – including administrative Settings

**Pre-Requisites:** None

**Training method:** eLearning

**Duration:** estimated 15-20 hours
ClickMobile Touch for Developers (#227t)

Course Description:
This course will enable the trainee (programmer) to develop ClickMobile Touch customizations using the product API.

Course Objectives:
By the end of this course the trainees will be able to:
- Understand the ClickMobile Architecture and Structure
- Understand the different Customization points of ClickMobile
- Develop ClickMobile Client Events and Form Events
- Develop a ClickMobile Custom panel
- Develop ClickMobile Widgets and Inline Panels
- Install and debug ClickMobile customizations

Pre-Requisites:
- Development background:
  - Minimum 1 year experience in the following:
    - C# (Preferred) or Visual Basic .Net programming
    - HTML, Java script, CSS
    - JQuery
  - E-Learning courses:
    - ClickMobile Technical Product Training (course #207e)
      For Partners only:
      - Associate Consultant ClickMobile (ACM) certification

Training method: Classroom

Duration: 3 days
**ClickMobile Classic for Engineers (#107c)**

**Course Description:**
This course provides understanding of the purpose and content of the ClickMobile Classic product. During this course, the trainees will learn and practice how to manage assignments, and view related information.

**Course Objectives:**
By the end of this course the trainees will be able to:
- Handle ClickMobile Classic assignments
- Handle ClickMobile Classic messages
- Work with ClickMobile Classic Timesheets

**Pre-Requisites:**
None

**Training method:**
Classroom

**Duration:**
4.5 hours

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**ClickMobile Classic Technical Product Training (#207c)**

**Course Description:**
The ClickMobile Technical Product Training course provides fundamental understanding of both theoretical and practical ClickMobile configuration knowledge that is required for ClickMobile implementations.

**Course Objectives:**
By the end of this course the trainees will be able to:
- Describe the ClickMobile solution
- Describe ClickMobile architecture
- Describe ClickMobile basic client functionalities
- Create and configure forms
- Configure a Dispatching Policy
- Perform Basic configuration – including administrative Settings
- Manage users in the system
- Configure ClickMobile UI and behavior by using the ClickMobile studio

**Pre-Requisites:**
None

**Training method:**
Classroom

**Duration:**
3 days
**ClickMobile Classic for Developers (#227c)**

**Course Description:**
This course will enable the trainee (programmer) to develop ClickMobile Classic customizations using the product API.

**Course Objectives:**
By the end of this course the trainees will be able to:

- Develop ClickMobile Client events
- Develop ClickMobile Form Events (Assignment / Time sheet)
- Develop a ClickMobile Custom panel on the (Assignment / Time sheet) form
- Develop a ClickMobile Custom client view, Alternative views
- Develop a Menu Add-In (Shortcut)
- Widgets

**Pre-Requisites:**
**Minimum 1 year experience** in the following:
- C# (Preferred) or Visual Basic .Net programming
- HTML, Java script, CSS
- JQuery

**Training method:**
Classroom

**Duration:**
3 days
ClickDashboard Technical Product Training (#301)

Part 1: Installation and Setup

Description:
This part provides the essential knowledge required to install and set up ClickDashboard environments, including data warehouse components needed for historical reporting. The training features hands-on practice of the step by step set up process.

Objectives:
By the end of this course the trainees will be able to:
- Describe the ClickDashboard Architecture & Flow
- Describe the ClickDashboard Historical Data Model
- Perform installations and upgrades to ClickDashboard environments

Pre-Requisites:
Familiarity with SO DB schema and ClickAnalyze Reports setup

Training method:
Classroom

Duration: 1 day

Part 2: Administration and Development

Description:
This part provides the essential knowledge required to administer ClickDashboard, design new dashboards and widgets, expand the existing data model and create new data models. The training includes an overview of each component and feature, and hands on training exercises.

Objectives:
By the end of this course the trainees will be able to:
- Describe the ClickDashboard OOTB reports and Elasticubes
- Administrate ClickDashboard
- Expand the current data model and create new dashboards, widgets and data models
- Perform basic troubleshooting

Pre-Requisites:
Basic SQL querying knowledge

Training method:
Classroom

Duration: 2 days
**ClickAnalyze Reporting for Managers (#103)**

**Course Description:**
This course provides an overview of ClickAnalyze reports as well as teaches how to generate reports and adjust their layout.

**Course Objectives:**
By the end of this course the trainees will be able to:
- Describe the scheduling basic terms and the scheduling concepts.
- Describe the various ClickAnalyze reports and their use
- Generate reports
- Customize the reports layout

**Pre-Requisites:**
None

**Training method:**
Classroom

**Duration:**
2.5 hours

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**ClickAnalyze Reporting for Administrators (#203)**

**Course Description:**
This course provides an overview of the ClickAnalyze Reporting capabilities, as well as administration and basic configuration.

**Course Objectives:**
By the end of this course the trainees will be able to:
- Generate ClickAnalyze Reporting reports
- Create reports templates for ClickAnalyze Reporting and define their characteristics
- Describe the basic ClickAnalyze Reporting configuration options

**Pre-Requisites:**
None

**Training method:**
Classroom

**Duration:**
4.5 hours
**ClickAnalyze Reporting for Implementers (#212)**

**Course Description:**
This course provides deep understanding of the ClickAnalyze Reporting product from UI, administration and configuration points of view.

**Course Objectives:**
By the end of this course the trainees will be able to:
- Generate ClickAnalyze Reporting reports
- Configure the reports layout
- Define new system reports

**Pre-Requisites:**
None

**Training method:**
Classroom

**Duration:**
1 day

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**ClickAnalyze Insight for Administrators (#204)**

**Course Description:**
This course provides an overview of the ClickAnalyze Insight capabilities, as well as basic configuration options.

**Course Objectives:**
By the end of this course the trainees will be able to:
- Generate ClickAnalyze Insight reports
- Describe ClickAnalyze Insight architecture
- Describe the usage of the ClickAnalyze Insight Agent and it's configuration

**Pre-Requisites:**
None

**Training method:**
Classroom

**Duration:**
4.5 hours
**ClickWorkforce for End Users (#502)**

**Course Description:**
This course is meant to teach Dispatchers how to utilize ClickWorkforce. The participants will learn about the scheduling challenges and ClickSchedule solution. In addition, the Dispatchers will learn how to perform their daily work in the system and how to handle exceptions in the schedule.

**Course Objectives:**
By the end of this course the trainees will be able to:
- Describe the scheduling challenges and ClickWorkforce solution
- Describe the different scheduling options in the system
- Manage the daily schedule and handle exceptions
- Manage tasks and handle resources availabilities

**Pre-Requisites:**
None

**Training method:**
Classroom

**Duration:**
1 day

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**ClickWorkforce for Administrators (#501b)**

**Course Description:**
This course provides deep understanding of ClickWorkforce features, administration and configuration options. Completing this course ensures that the trainees have the knowledge needed to perform ClickWorkforce administration tasks. The course is comprised of a preliminary self-paced eLearning course, where you will learn about administration aspects in ClickSchedule and ClickMobile, and a following class course, where you will learn about administration aspects in ClickWorkforce.

**Course Objectives:**
By the end of this course the trainees will be able to:
- Describe the scheduling challenges and the solution
- Describe the ClickSchedule client interface and perform basic functions in the client
- Configure the various ClickSchedule components as required in the administration
- Describe the ClickMobile solution and functionality
- Customize ClickMobile user forms
- Describe the ClickWorkforce business challenge and solution
- Describe the ClickWorkforce interface and perform basic user functions
- Describe the ClickWorkforce architecture and integrate ClickWorkforce to the Service Optimization Suite
- Configure and customize the various ClickWorkforce components
- Troubleshoot ClickWorkforce

**Pre-Requisites:**
None

**Training method:**
Blended (eLearning + classroom)

**Duration:**
Part 1: eLearning – estimated 20 hours
Part 2: classroom training - 2 days
ClickWorkforce Technical Product Training (#507)

Course Description:
This course provides deep understanding of ClickWorkforce features, administration and configuration options. Completing this course ensures that the trainees have the knowledge needed to perform ClickWorkforce implementation tasks.

Course Objectives:
By the end of this course the trainees will be able to:
- Describe the ClickWorkforce Solution and basic interface, and perform basic scheduling in the solution
- Describe the ClickWorkforce architecture
- Install and configure the system for use, including the set-up of permissions
- Customize the ClickWorkforce page layout and create new objects and fields in the system
- Configure the solution’s integration between Salesforce and Service Optimization
- Configure and use the solution’s reports and dashboards
- Troubleshoot issues in the system and describe the workflow of working with Support
- Describe the necessary elements in managing a ClickWorkforce implementation
- Describe the best practices of a ClickWorkforce solution design

Pre-Requisites:
- ClickSchedule Technical Product Training (course #201/802/811)
- ClickMobile Technical Product Training (course #207/807/817)
- Salesforce implementation experience
  - For Partners only:
    - Associate Consultant ClickSchedule (ACS) certification
    - Associate Consultant ClickMobile (ACM) certification

Training method: Classroom

Duration: 3 days
ClickRoster for End Users (#108)

Course Description:
This course is meant to provide an understanding of the purpose and content of ClickRoster and to give the ability to use it for viewing information and performing actions regarding the rostering process.

Course Objectives:
By the end of this course the trainees will be able to:
- Describe the shift scheduling challenge
- Describe the rostering process
- Perform client functionalities that are used by the different process phases

Pre-Requisites:
None

Training method:
Classroom

Duration:
1 day

ClickRoster Technical Product Training (#208)

Course Description:
This course provides deep understanding of the ClickRoster product from business, UI, administration and configuration points of view.

Course Objectives:
By the end of this course the trainees will be able to:
- Describe ClickRoster main features
- Describe ClickRoster data model and events
- Configure the rules and objectives used by ClickRoster
- Configure the Automatic Scheduling process in the system
- Describe ClickRoster server events
- Configure ClickRoster client and the employee portal
- Define multiple ClickRoster sites

Pre-Requisites:
None

Training method:
Blended (eLearning + classroom)

Duration:
Part 1: eLearning – estimated 5 hours
Part 2: classroom training - 4 days
ClickRoster for Developers (#308)

Course Description:
ClickRoster includes creating shift plans for days, weeks, months, and years in advance, while also recalculating the shift plans dynamically based on last-minute changes.

Course Objectives:
By the end of this course the trainees will be able to:
- Perform server basic customizations
- Perform client customizations
- Perform troubleshooting- log
- Describe common mistakes and how to deal with them

Pre-Requisites:
- Programming in Visual Studio 2010
- Programming in C# (Preferred) or Visual Basic .Net
- Knowledge of Windows 2008
- Course #208 - ClickRoster Technical Product Training (#208)
- For partners only - Associate Consultant ClickRoster (ACR) certification

Training method:
Classroom

Duration:
4 days
Supporting ServiceOptimization Implementations (#801)

Course Description:

This course is meant to provide the trainees with an understanding regarding ServiceOptimization implementations and by that give the ability to perform first level support for ClickSoftware products.

- Procedures
- Customer Zone
- Architecture
- Integration
- Agents
- Clients
- GIS
- Troubleshooting
- Performance
- BGO Optimization

Course Objectives:

By the end of this course the trainees will be able to:

- Perform troubleshooting for various problems in the Service Optimization environment
- Perform first level support in the following:
- Use advanced troubleshooting tools
- Describe the working procedures with ClickSoftware Support

Pre-Requisites:

- ClickSchedule Technical Product Training (course #201/802/811)
- Windows administrator skills

Training method: Classroom

Duration: 4 days

Testing ServiceOptimization Implementations (#401)

Course Description:

This course is meant to provide the trainees the ability to plan QA activities for a ClickSchedule implementation project, as well as providing information and knowledge on the configuration part of the system.

Course Objectives:

By the end of this course the trainees will be able to:

- Understand the QA activities taken by ClickSoftware’s PSQA team: configuration and End to End.
- Better understand the configuration part of the system.
- Plan and perform QA activities of a ClickSchedule implementation project

Pre-Requisites:

- Course #201 - ClickSchedule Technical Product Training
- Prior experience with ServiceOptimization
- Prior experience as a QA Engineer

Training method: Classroom

Duration: 3 days
ClickPlan for End Users (#105)

Course Description:
This course is meant to provide the trainees with an understanding of the purpose and content of ClickPlan.

Course Objectives:
By the end of this course the trainees will be able to:
- Describe the business problem and planning process
- Work with Demands and Resources
- Describe the different allocation methods
- Work with the Plan Tuning wizard
- Scenarios model
- Variation management
- Advanced topics

Pre-Requisites:
None

Training method:
Classroom

Duration:
1 day

ClickPlan for Administrators (#205)

Course Description:
This course is meant to provide the trainees with an understanding of the purpose and content of ClickPlan.

Course Objectives:
By the end of this course the trainees will be able to:
- Access the Administration Window
- Creating ClickPlan Administrative Settings
- ClickPlan General Settings
- ClickPlan User Settings

Pre-Requisites:
Course #202 / #202e - ClickSchedule for Administrators course

Training method:
Classroom

Duration:
1.5 days
ClickForecast for End Users (#106)

Course Description:
This course is meant to provide the trainees with an understanding of the purpose and content of ClickForecast, and to give them the ability to use it for creating long term and short term forecasts.

Course Objectives:
By the end of this course the trainees will be able to:

▪ Perform the day to day work of a forecast analyst using ClickForecast
▪ Create a baseline forecast, then adjust, finalize and update it

Pre-Requisites:
None

Training method:
Classroom

Duration:
1 day

ClickForecast for Administrators (#206)

Course Description:
This course is meant to provide the trainees the ability to administrate and configure the ClickForecast.

Course Objectives:
By the end of this course the trainees will be able to:

▪ Use ClickForecast administrative tools to enable full functionality of ClickForecast server and maintain the server environment

Pre-Requisites:
Course #202 - ClickSchedule for Administrators course

Training method:
Classroom

Duration:
1.5 days