



## Rocket Aldon Community Manager Administrator Training Outline

This is a typical agenda for Rocket Aldon Community Manager administrator training, referred to as Aldon CM throughout this document. The objective of the training is to ensure that the Aldon CM administrator has the requisite knowledge to maintain the Aldon CM system and workspace configurations to deliver the desired outcome. The relationships between features will be explained to ensure an understanding of cause and effect of changes to be made. Best practices in designing and testing changes will be covered. Prior to the training session, topics will be prioritized as appropriate for the client environment.

### *Aldon CM Overview*

Recap of the capabilities of Aldon CM and a review of your organization's workflow design.

### *Aldon CM System-level Configuration Overview*

The most commonly used system-wide settings will be explained. This includes the look and feel of Aldon CM, general preferences, email and authentication settings, and license management.

### *Aldon CM Workspace Configuration Overview*

The Aldon CM workspace configuration components will be explained at a high level. The features in use will be highlighted and reviewed in detail following the overview.

### *Detailed Workspace Configuration topics to be covered (as determined by client)*

- 1) Address Book Definition
- 2) Roles, Teams, and Permissions
- 3) Incoming and outgoing email
- 4) Workflow automation
  - a. Escalations
  - b. Auto Assignment
  - c. Approval Processes
  - d. Automated Calculations
- 5) Interface with Aldon LMe and Aldon LMi
- 6) Customer Self-Service
- 7) Customizing User Preferences and Dashboards
- 8) Quick Templates
- 9) Master Tasks and Sub-Tasks
- 10) Global Issues
- 11) Service-Level Agreements
- 12) Knowledge Base
- 13) Calendar Functions
- 14) Searching and Reporting