



Course Offerings Guide

Professional Development Services



Callidus Software Training Course Offerings

Callidus Software® offers a comprehensive set of performance-oriented, role-based training courses that enable students to become proficient in the implementation, administration and use of Callidus Software Sales Performance Management (SPM) and Pervasive Performance Management (PPM) solutions. The Callidus Software SPM solution is utilized most effectively when project members have both formal and informal training before, during and after the implementation process, ensuring they possess the required skills and knowledge to use the software effectively.

The Callidus Software Professional Development team has designed each course to meet specific skill and performance objectives. Based on training and implementation experience, our instructors guide students through relevant examples, hands-on exercises and best practices. The training is focused on providing students with the abilities and understanding to take advantage of the powerful capabilities of Callidus Software solutions.

Course Delivery Methods

Callidus Software recognizes and understands the varying needs of different Callidus SPM users. As a result, the Professional Development Services team offers a variety of training delivery methods and approaches to meet the unique needs of every customer.

- **Web-Based Training** provides opportunities to learn anywhere and anytime. These courses are designed to help students gain knowledge through self-paced training, accessible with a simple Internet connection and browser.
- **Public Instructor-Led Classes** are offered in Austin, Texas; London, England; and Scottsdale, Arizona. All locations provide comfortable state-of-the-art training facilities, where students have the opportunity to learn and interact with other students. These classes are ideal for single students and small groups of students, who prefer the classroom setting and direct access to the instructor.
- **Onsite Instructor-Led Classes** are offered at your location for groups that include a minimum of five students for a single class. Onsite classes offer a more intimate setting where students can interact as a team with the instructor, and focus on topics that are relevant to your specific environment. These offerings may be our standard courses, or may be customized for an additional fee. All required course materials are supplied.
- **Custom Training** is available for those who are interested in specific topics, or want to use customer-specific data as part of the training curriculum. This training may include Call Center Training, Plan Update Training, Process Training, or other training that might be needed by your organization.
- **Virtual Live Web Classes** are offered with a Callidus instructor teaching remotely. The training is fully interactive with sound, visuals, chat, and product demonstrations. In addition, students will have full access to their own Callidus training environment to complete hands-on labs and exercises in a live application. All this can be done without leaving your desk.
- **Virtual Self-Study Classes** allow students to immerse themselves in the Callidus training environment, but the student can learn at the location and time of their choice. Using courseware, checklists, and roadmaps as guides, students can progress at their own pace, and develop an in-depth understanding of TrueComp®.

See our course schedule at: <http://www.callidussoftware.com/education/courses/schedule/>

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Training Format

All Callidus training courses are taught with the understanding that all students learn differently. Courseware is provided with each course, and all basic and advanced courses are divided into easy to follow modules and topics. Within each topic, the following are covered:

- Concept:** The instructor will provide a conceptual explanation and description of the feature, functionality or capability being discussed.
- Demonstration:** The instructor will visually demonstrate the feature, functionality, or capability being discussed within the application being taught. In many cases, the instructor will also provide additional insight or tips about the specific functionality.
- Exercise:** After a topic has been covered with explanation and demonstration, students are given the opportunity to do hands-on labs within the application being taught. Each student will have their own training environment to work. In most classes, the labs build upon previous exercises to provide a complete start-to-finish understanding of the application.

Suggested Training Plan by Role

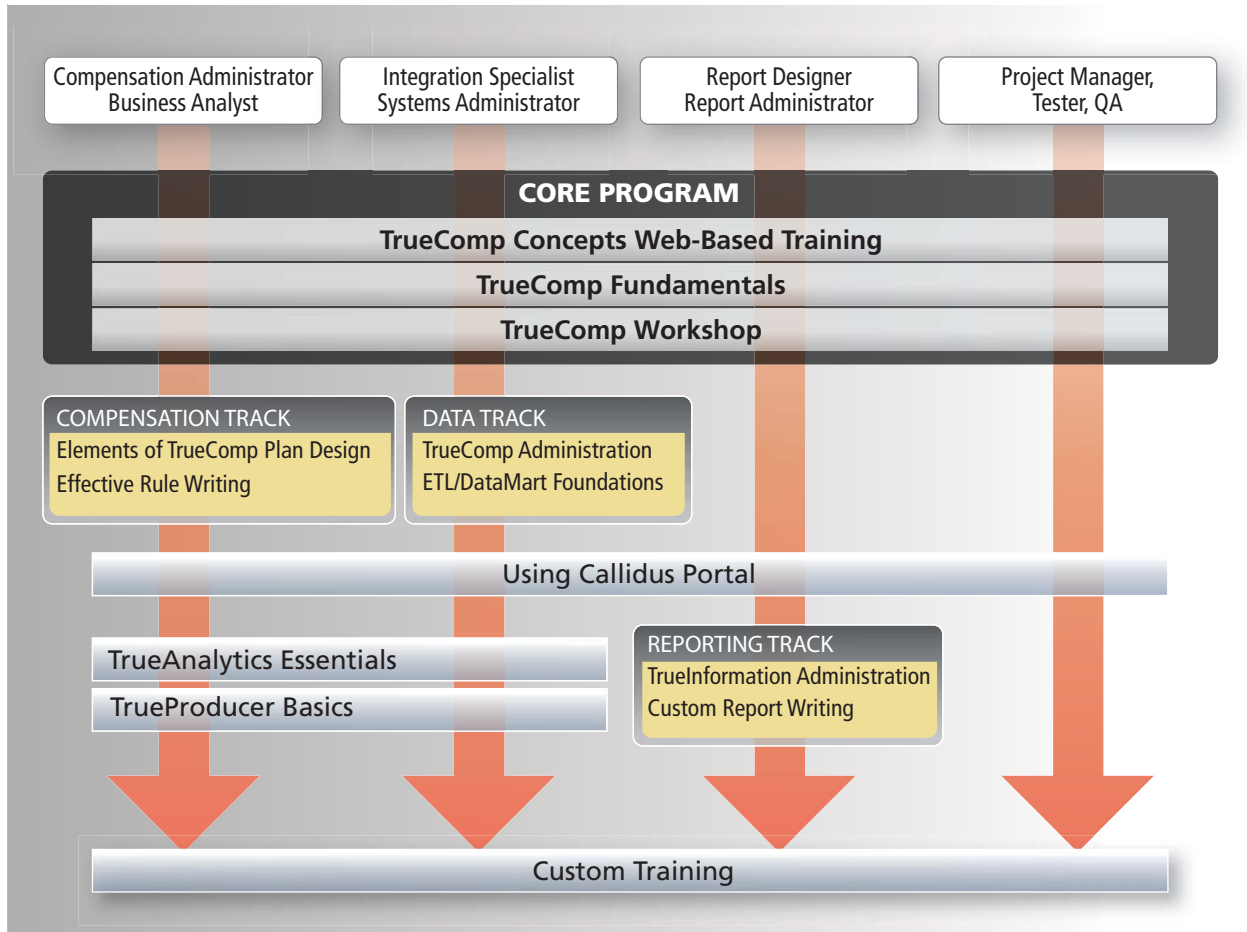
Course Name	Compensation Administrator/ Business Analyst	Integration Specialist/ Systems Administrator	Report Designer/ Report Administrator	Project Manager/ Testers/QA	End Users
CORE PROGRAM					
TrueComp Concepts - WBT	■	■	■	■	□
TrueComp Fundamentals	■	■	■	■	
TrueComp Workshop	■	■	□	■	
TrueComp Delta Training*	■	■	□		
DATA					
TrueComp Administration	□	■		□	
ETL and Datamart Foundations (Advanced)		■	□		
COMPENSATION					
Elements of TrueComp Plan Design (Advanced)	■			□	
Effective Rule Writing Workshop (Advanced)	■				
PORTAL					
Using Callidus Portal	■	■	■	□	
REPORTING					
TrueInformation Administration			■		
Custom Report Writing (Advanced)			■		
TRUEANALYTICS					
TrueAnalytics Essentials (Advanced)	■	■	□	□	
TRUEPRODUCER					
TrueProducer Basics	■	■			
END USER and CUSTOM TRAINING					
Custom Training Curriculum Developed (End Users, Upgrades, Call Centers, Process)	■	■		□	■

* Fundamentals and Workshop alternative for experienced TrueComp users of a prior version
 ■ Recommended (review course descriptions for prerequisites)
 □ Suggested

Training Roadmap

Professional Development Services (PDS) is very familiar with the many roles and associated responsibilities necessary to implement and manage the Callidus Software solution. To ensure that students gain the knowledge and skills necessary to succeed in each unique role, the Callidus Software Professional Development Services team offers unique training tracks, each one tailored for different users involved in the implementation and ongoing management of Callidus Software SPM products.

The visual below is only a recommendation. Each customer defines roles and responsibilities differently. The Professional Development Services team can work with your team to determine the best training path for you.

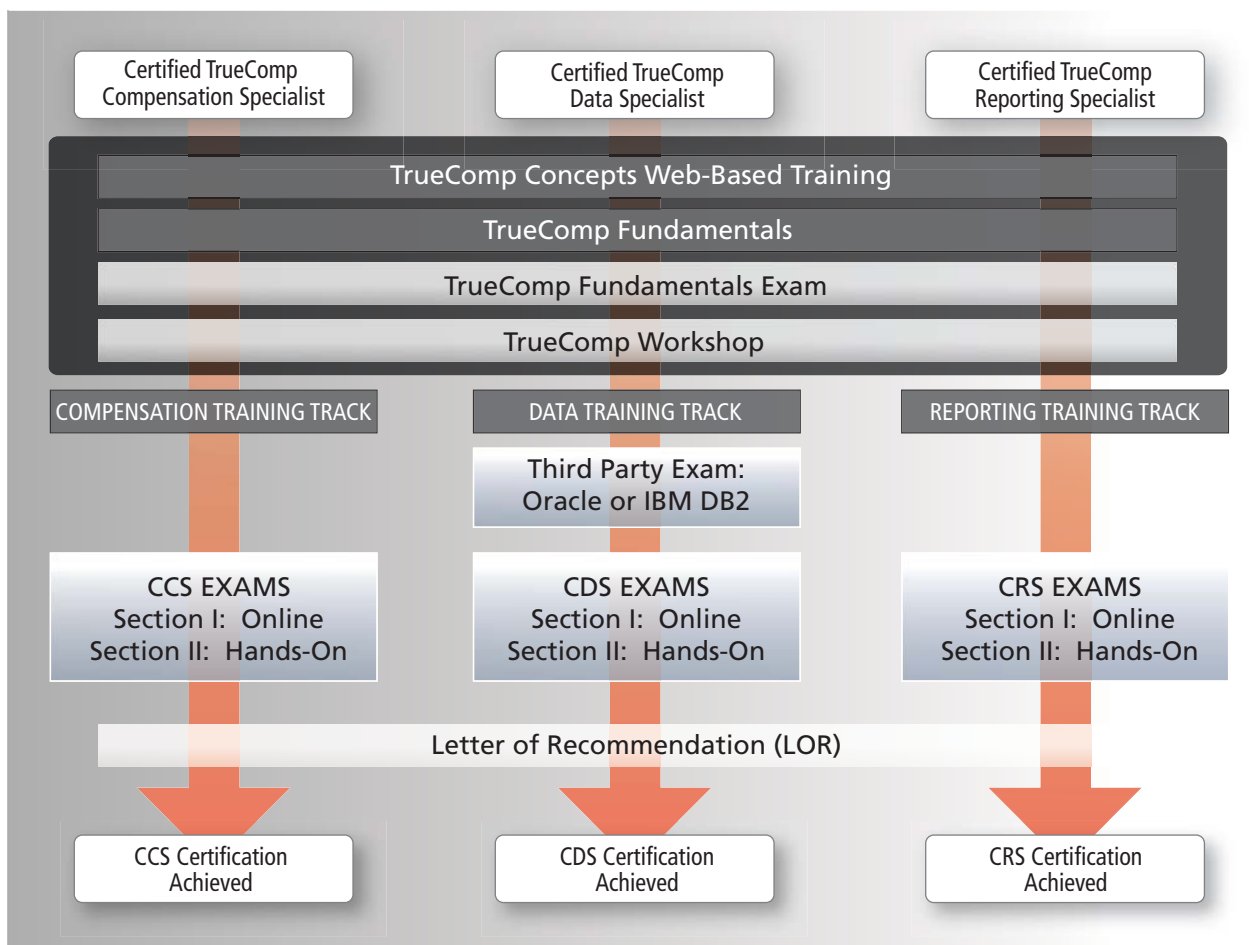


Certification Roadmap

Callidus Certification speaks volumes about your professional abilities. Whether on your business card, letterhead, or resume, your Callidus Software Certification indicates that you meet the highest levels of SPM professional performance. As your business changes, the Callidus Software Certification Program enables you to keep pace with the most current developments in SPM, network with fellow professionals, and gain skills you can apply immediately.

Callidus Software Certifications are organized into three 'tracks', and are the means to solidifying specific skills in a specified job role. The program validates that you have learned the specialized skills needed for implementing the suite of Callidus Software products.

Below is an outline of the current certification paths that can be taken. Detailed information and requirements can be found at <http://www.callidussoftware.com/education/certification/>

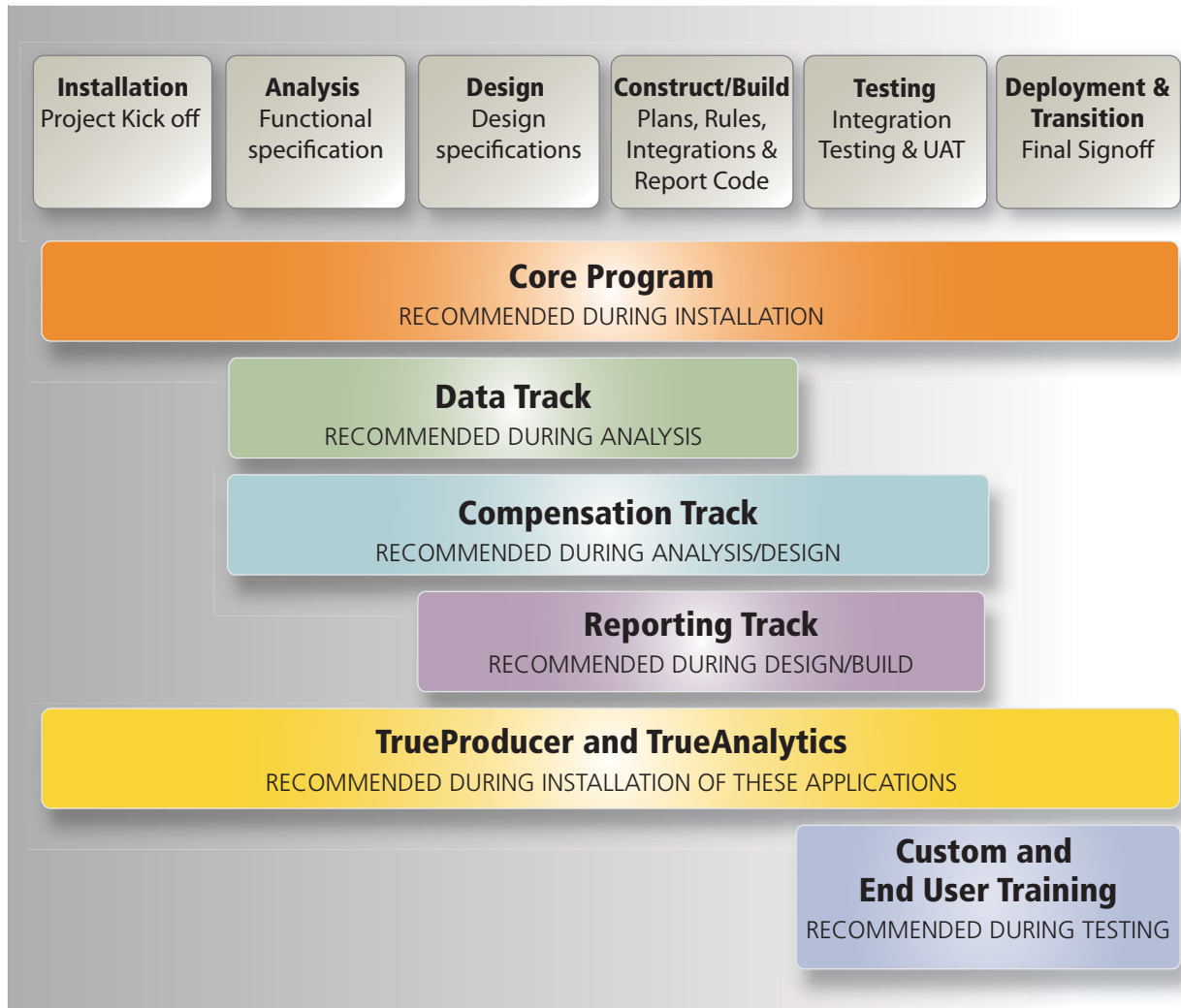


Certification Requirements

1. Complete the Certification Application
2. Pass the Fundamentals Exam (70%)
3. Complete the TrueComp® Workshop
4. Pass the Section I Online Exam (70%)
5. Pass the Section II Hands-On Exam (70%)
6. Complete the Letter of Recommendation

Training within the Callidus Implementation Project Lifecycle

As you progress through the stages of your project implementation, there are recommended courses that will help with the transfer of knowledge and understanding within the TrueComp® applications. The table below provides a general timeline and course recommendations throughout the project lifecycle. All classes are also recommended when you have new users after implementation, and when deployment has completed.



Callidus Software Professional Development Course Detail

This catalog provides detailed information about each of the classes that are currently being offered. Information for each class will include the recommended audience, a brief description of the class, the delivery methods available, the length of the course by method, and any required or recommended prerequisites. Class schedules are available on the Callidus Web site:

<http://www.callidussoftware.com/education/courses/>

TrueComp 5.x Core Program

TrueComp 5.x Concepts Web-Based Training

Prerequisite to all other classes

Audience This course is designed for first-time users of TrueComp®, and is intended for the entire customer compensation team, including compensation managers, administrators, analysts and IT professionals. While this course is primarily for the team involved in the TrueComp implementation, executives and directors wanting an overview of the product should complete this online course.

Duration	Delivery Method	Course Length
	Web-Based Training	4 - 6 hours

Description This course features eight topic-based modules and real-life interactive scenarios in which the user solves problems using TrueComp. Tami, our compensation expert, will introduce the training and be your guide throughout the learning experience. The core concepts of this course are broken down into easy-to-understand segments, with review questions following each module.

Objective Upon completion, students will have an understanding of the following:

- Sales Performance Management and the TrueComp Suite of products
- Basic TrueComp architecture, interface, and administrative functionality
- Compensation terminology related to Callidus and the TrueComp application
- General industry examples of how TrueComp is used to solve compensation challenges

* A short test is included with this course to gauge knowledge and understanding of the covered concepts.

Prerequisites

- No course prerequisites
- Internet Explorer 5.5 (SP2) or newer – *REQUIRED*
- High-speed Internet connection – *RECOMMENDED*
- Sound card – *RECOMMENDED*

TrueComp 5.x Fundamentals

Audience This course is designed to enhance the user’s knowledge of TrueComp®, its features, functionality and capabilities. This course is intended for the entire compensation team, including compensation managers, administrators, analysts and IT professionals.

Duration	Delivery Method	Course Length
	Public or Onsite	3 days
	Virtual Self-Study	5 days
	Virtual Live Web	5 half-day sessions

Description This course covers a wide range of topics focused on providing basic understanding of the many features, functionality, and capabilities of the TrueComp application.

- Objective** Upon completion, students will have an understanding of the following:
- Navigation, administration, and search functionality within the TrueComp User interface
 - Organizational data, and how it is used to manage payee information
 - How to categorize information to define and sort transactional data
 - The flexibility and capabilities of business rules to build effective compensation plans
 - The TrueComp Pipeline and other result-generation features
 - Tracing results and managing adjustments
 - Customization of fields and attributes within TrueComp
- * An exam is included with this course to gauge knowledge and understanding of the covered concepts.

- Prerequisites**
- TrueComp 5.x Concepts Web-Based Training – *REQUIRED*
 - Familiarity with compensation terminology
 - Familiarity with Microsoft Windows

TrueComp 5.x Workshop

Audience The course is designed to enhance knowledge for compensation administrators and IT professionals who implement and support TrueComp®. By using a team concept, students develop effective strategies to prepare for their own implementation. It is recommended that technical members of the team who will be heavily involved in implementing TrueComp also attend this course.

Duration	Delivery Method	Course Length
	Public or Onsite	2 days
	Virtual Self-Study	5 days
	Virtual Live Web	2 days

Description This workshop is designed to simulate the tasks performed on a typical TrueComp project. Students are given the assignment to implement a compensation solution for a fictional company based on information, data, and requirements that are provided. Students will decipher and organize the information, load data, author rules and related plan data, and calculate compensation through the TrueComp pipeline. The role of the instructor is to facilitate discussion in planning the implementation process, reviewing data and plan creation, and to assist with debugging errors that may arise.

- Objective** Upon completion, students will have an understanding of the following:
- How to translate requirements into business logic within TrueComp
 - The data import and input process
 - Analyzing and building basic compensation rules and plans
 - The TrueComp pipeline process and how results are generated
 - Validating calculated results
 - Troubleshooting errors and making adjustments

- Prerequisites**
- TrueComp 5.x Concepts Web-Based Training – *REQUIRED*
 - TrueComp 5.x Fundamentals – *REQUIRED*
 - Familiarity with relational database concepts and database tools

TrueComp 5.x Delta Program

TrueComp 5.x Delta Training *

Audience This course is intended for all TrueComp® users, both business and IT professionals, with current knowledge of TrueComp and are upgrading to TrueComp 5.x. This program meets the requirements of the Callidus Certification Program for 5.x in lieu of the TrueComp 5.x Fundamentals and TrueComp 5.x Workshop.

Duration	Delivery Method	Course Length
	Onsite	4 days
	Virtual Live Web	3 half-day sessions and 2 full days

Description This Delta Training is designed to provide students with an introduction to the TrueComp 5.x product. With the expectation that students have some level of knowledge of TrueComp, the pace will be accelerated and trainers will work to identify, adjust, and focus on relevant topics based on student needs. The course is broken into two sections:

- TrueComp 5.x Concepts and Administration
- TrueComp 5.x Workshop

Objective Upon completion, students will have an understanding of the following:

- New interface navigation and search functionality
- New product enhancements and features related to the 5.x environment
- Expanded workspace and customization capabilities
- Additional administrative tasks that can be managed through the TrueComp interface

Prerequisites

- TrueComp 5.x Concepts Web-Based Training – *REQUIRED*
- Experience with prior version of TrueComp – *REQUIRED*

*** NOTE: This class is scheduled by request only.**

TrueComp 5.x Compensation Track

Elements of TrueComp 5.x Plan Design – Advanced Course

Audience This course is intended for compensation professionals responsible for developing, modifying and designing Compensation Plans.

Duration	Delivery Method	Course Length
	Public or Onsite	2 days
	Virtual Live Web	4 half-day sessions

Description This course will teach strategies to develop and execute compensation plan designs within TrueComp®. Using real-life scenarios, students will also run pipelines, evaluate results, and identify other useful tools for rule and plan development.

- Objective** Upon completion, students will have an understanding of the following:
- How to develop, modify and design rules and compensation plans using the TrueComp application
 - Development and execution strategies of compensation plan analysis, process flow, required components, rule design and expected results
 - Best approaches to designing compensation rules and plans in TrueComp
 - TrueComp pipeline processes and result calculations

- Prerequisites**
- TrueComp 5.x Concepts Web-Based Training – *REQUIRED*
 - TrueComp 5.x Fundamentals or TrueComp 5.x Delta Training – *REQUIRED*
 - TrueComp 5.x Workshop – *REQUIRED*
 - TrueComp 5.x Administration – *RECOMMENDED*

Effective Rule Writing Workshop 5.x – Advanced Course

Audience This advanced workshop is designed for administrators, plan designers and compensation specialists who will be managing plan development and rule writing within TrueComp®.

Duration	Delivery Method	Course Length
	Public or Onsite	2 days

Description This course will introduce students to advanced concepts that will assist in developing strategies for interpreting compensation plans, solving compensation-related issues, and structuring rules to be most effective. Students will work with real-life scenarios to improve skills needed to manage various compensation policies and rules.

Objective Upon completion, students will have an understanding of the following:

- Data, formula, and specific conditions that affect rule logic automation
- Efficient and effective ways to design compensation plans
- Benefits and challenges of aggregating data
- How time impacts rules, rates, and results within TrueComp

Prerequisites

- TrueComp 5.x Concepts Web-Based Training – *REQUIRED*
- TrueComp 5.x Fundamentals or TrueComp 5.x Delta Training – *REQUIRED*
- TrueComp 5.x Workshop – *REQUIRED*
- Elements of TrueComp 5.x Plan Design – *REQUIRED*
- TrueComp implementation experience – *RECOMMENDED*

Principles of Sales Compensation

Audience This course is intended for compensation professionals and business analysts responsible for developing, modifying and designing Compensation Plans for an organization.

Duration	Delivery Method	Course Length
	Public or Onsite	2 days
	Virtual Live Web	4 half-day sessions

Description This course introduces students to the basic principles of sales compensation. Emphasis is placed on terminology and concepts used throughout the compensation process within organizations. The course reviews compensation design techniques and how they may be incorporated into sales planning. Through exercises and lab work, students will review typical sales cycles and work to gain a better understanding of the influences that impact the sales compensation process.

- Objective** Upon completion, students will have an understanding of the following:
- Different corporate reward options and the impact they have on sales organizations
 - Various selling strategies that drive compensation
 - The components of a sales force lifecycle and influences they have on compensation
 - The key components of compensation plan design

- Prerequisites**
- No course prerequisites

TrueComp 5.x Data Track

TrueComp 5.x Administration

Audience This technical course is intended for compensation administrators and IT professionals who help implement, set up and support data interfaces into and within TrueComp® 5.x.

Duration	Delivery Method	Course Length
	Public or Onsite	2 days
	Virtual Live Web	4 half-day sessions

Description In this course, students will work to develop the skills necessary to deploy, configure and maintain a TrueComp installation. Administrative features within TrueComp will also be covered.

- Objective** Upon completion, students will have an understanding of the following:
- How to install, deploy and configure TrueComp software
 - Administration of implementation data, such as unit types, credit types, calendars
 - Security administration, including user accounts, security roles, permissions and business units
 - Setting user and system preferences
 - Customizing the environment by revealing and labeling custom data fields
 - Relationships between various staging tables in a TrueComp database
 - Importing, validating and transferring data into a TrueComp database using tools provided by the software
 - Compensation data export and import in XML and CSV formats
 - Pipeline administration including message logs, audit logs and output files

- Prerequisites**
- TrueComp 5.x Concepts Web-Based Training – *REQUIRED*
 - TrueComp 5.x Fundamentals or TrueComp 5.x Delta Training – *REQUIRED*
 - TrueComp 5.x Workshop – *RECOMMENDED*
 - Familiarity with relational database concepts and database tools
 - Familiarity with systems implementation methodology – *RECOMMENDED*

TrueComp 5.x Datamart and ETL Foundations – Advanced Course

Audience This advanced-level technical course is intended for IT professionals who set up data interfaces and manage data loads between corporate sources, the TrueComp® 5.x Repository and the TrueComp Datamart.

Duration	Delivery Method	Course Length
	Public or Onsite	3 days
	Virtual Live Web	5 half-day sessions

Description Using scenarios derived from real implementations, students will work to develop skills and execute strategies necessary to deploy, configure, and populate the Datamart, and administer the Extract Transform and Load (ETL) processes to transfer data from a TrueComp database to a TrueComp Datamart in support of TrueInformation® and Callidus TrueAnalytics™.

Objective Upon completion, students will have an understanding of the following:

- Deployment, configuration, population and customization of the TrueComp Datamart
- Data setup for ETL and administration of ETL processes
- The TrueComp Datamart structure
- Analysis and customization of the TrueComp ETL process
- Develop strategies for import, validation and transfer of data from the TrueComp repository into the database using tools provided with software
- The ETL mappings and workflows
- The relationships between various tables and fields in the TrueComp repository and those in the Datamart
- Customization capabilities in the TrueComp environment for ETL and the Datamart

Prerequisites

- TrueComp 5.x Concepts Web-Based Training – *REQUIRED*
- TrueComp 5.x Fundamentals or TrueComp 5.x Delta Training – *REQUIRED*
- TrueComp 5.x Workshop – *RECOMMENDED*
- TrueComp 5.x Administration – *REQUIRED*
- Database ETL experience or Informatica “PowerCenter – Level I Developer” course or equivalent – *RECOMMENDED*
- Familiarity with SQL – *RECOMMENDED*

Callidus Portal

Using Callidus Portal 5.x

Audience This introductory course is intended for anyone who will be using or managing Callidus thin-client applications, including TrueInformation®, Callidus TrueAnalytics™, TrueProducer™, and TrueResolution®. It is recommended for report environment administrators, including report writers and report developers; compensation dispute management personnel; broker administrators; and IT professionals.

Duration	Delivery Method	Course Length
	Public or Onsite	1 day
	Virtual Live Web	1 half-day session

Description This course introduces students to Callidus Portal, the single sign-on gateway that acts as a framework for all Callidus web applications. Topics covered will include basic administration and security, system and user preferences, and management of the visual environment. Hands-on labs will give students experience creating and assigning roles and permissions to users, managing system settings, and creating dashboards and portlets.

Objective Upon completion, students will have an understanding of the following:

- The features and functionality of Callidus Portal
- System settings and personal preference management
- Building internal users and groups
- Creating and assigning roles and permissions to Callidus Portal objects
- Customized portlets and dashboards

Prerequisites

- TrueComp 5.x Concepts Web-Based Training – *REQUIRED*
- TrueComp 5.x Fundamentals or TrueComp 5.x Delta Training – *RECOMMENDED*

TrueInformation 5.x Reporting Track

TrueInformation 5.x Administration

Audience This technical course is intended for report environment administrators, including report writers, report developers and IT professionals. In some instances, advanced TrueComp® users involved with data integration or report generation who want to know how to administer and manage reporting with TrueInformation® can also enroll.

Duration	Delivery Method	Course Length
	Public or Onsite	1 day
	Virtual Live Web	2 half-day sessions

Description This course covers a wide range of topics involved in TrueInformation administration, ranging from setting up report permissions to generating reports from the user interface. Security topics will be discussed so that students will be familiar with authentication mechanisms, role assignment and page-level security. Exercises practicing report implementation and deployment will reinforce learning. Callidus Portal portlets and dashboards will also be discussed. The course concludes with a high-level overview of Actuate report design and generation. After the course, the report environment administrator will understand the functionality and architecture of Callidus Portal and TrueInformation. They will also be able to use these applications to enforce security and deploy reports.

Objective Upon completion, students will have an understanding of the following:

- The components of the TrueInformation reporting environment
- The features of Callidus Portal and TrueInformation
- Customized portlets and dashboards
- Administrative tasks in the reporting environment
- The base reports with Actuate's eReport Designer Professional

Prerequisites

- TrueComp 5.x Concepts Web-Based Training – *REQUIRED*
- TrueComp 5.x Fundamentals or TrueComp 5.x Delta Training – *RECOMMENDED*
- TrueComp 5.x Workshop – *RECOMMENDED*
- Using Callidus Portal 5.x - *REQUIRED*
- Familiarity with compensation terminology

Custom Report Writing 5.x Workshop – Advanced Course

Audience This advanced level course is intended for report developers responsible for developing, modifying and designing TrueInformation® (Actuate) Reports.

Duration	Delivery Method	Course Length
	Public or Onsite	3 days
	Virtual Live Web	4 half-day sessions and 1 full day

Description This course will introduce report developers to the Actuate 9 report development environment, providing participants with exercises on topics such as chart development, design libraries and conditional sections. The Callidus Template Report will be discussed in depth and used to build custom reports. The course will cover grouping, page-level security, and other useful topics for report development. An introduction to Actuate Basic will be covered to help students implement custom features and debug Actuate code. This course includes a workshop in which students will use the information they learned to design, build, and implement reports using real-world scenarios.

Objective Upon completion, students will have an understanding of the following:

- Customized reports starting with the Template Report
- Page-level security in report designs
- SQL queries and joins
- Report development using custom libraries, hyperlinks and charts
- Various structure components like Group, Conditional and Parallel sections
- Debugging techniques in simple Actuate Basic code

Prerequisites

- TrueComp 5.x Concepts Web-Based Training – *REQUIRED*
- TrueComp 5.x Fundamentals or TrueComp 5.x Delta Training – *RECOMMENDED*
- Using Callidus Portal 5.x – *REQUIRED*
- TrueInformation 5.x Administration – *REQUIRED*
- Familiarity with relational database concepts and SQL – *RECOMMENDED*
- Familiarity with Actuate eReport Designer Professional – *RECOMMENDED*

Callidus TrueAnalytics 5.x Program

TrueAnalytics 5.x Essentials — Advanced Course

Audience This course is intended for business analysts, compensation administrators, and IT professionals who will be using or managing reporting and analytics within the Callidus TrueAnalytics™ application.

Duration	Delivery Method	Course Length
	Public or Onsite	2.5 days
	Virtual Live Web	4 half-day sessions

Description This course introduces students to the TrueAnalytics application. Topics covered will include system architecture, an introduction to the TrueAnalytics environment, and the creation of reports and analytics using Business Objects WebIntelligence and Dashboard Manager. Hands-on labs will give students experience creating and managing WebIntelligence objects and analytics.

- Objective** Upon completion, students will have an understanding of the following:
- The features and functionality of the TrueAnalytics 5.x application
 - The TrueAnalytics architecture
 - Business Objects settings and preferences
 - How to create WebIntelligence reports and dashboard analytics
 - Customization options for the Callidus Portal dashboard with analytic objects
 - How to create and modify Universe objects
 - Security management for TrueAnalytics users and objects

- Prerequisites**
- TrueComp 5.x Concepts Web-Based Training – *RECOMMENDED*
 - TrueComp 5.x Fundamentals or TrueComp 5.x Delta Training – *RECOMMENDED*
 - Using Callidus Portal 5.x - *REQUIRED*
 - Familiarity with relational database concepts and SQL – *RECOMMENDED*
 - Familiarity with compensation terminology

Callidus TrueProducer 5.x Program

TrueProducer 5.x Basics

Audience This course is intended for those responsible for producer administration in the insurance industry, as well as insurance industry producer administrators, compensation administrators, IT professionals, and anyone else responsible for the maintenance and administration of the producer administration process.

Duration	Delivery Method	Course Length
	Public or Onsite	2 days

Description This course will introduce students to TrueProducer™ – its architecture, environment, and functionality. Students will learn the fundamentals of TrueProducer administration and security, navigation and searches. In addition, students will learn various tasks related to producer, category hierarchy, contract, and credential management.

Objective Upon completion, students will have an understanding of the following:

- The components of the TrueProducer architecture
- Customization functionality of the TrueProducer interface
- The Callidus Portal framework
- Basic and advanced searches
- How to create and approve producer records
- Navigation through a category hierarchy
- Contracts administration
- How to create and view producer credentials
- System preferences settings

Prerequisites

- TrueComp 5.x Concepts Web-Based Training – *RECOMMENDED*
- TrueComp 5.x Fundamentals or TrueComp 5.x Delta Training – *RECOMMENDED*
- Using Callidus Portal 5.x - *REQUIRED*
- Familiarity with compensation terminology

Callidus TrueResolution Program

TrueResolution Payee Self-Service Lite Web-Based Training

Audience This course is intended for sales representatives, managers, and compensation administrators who will be responsible for managing the workflow process of submitting, resolving and approving online compensation inquiries.

Duration	Delivery Method	Course Length
	Web-Based Training	1 hour

Description This course is designed to introduce the features and functionality of Payee Self-Service. Payee Self-Service is a workflow solution built on the Callidus TrueResolution® framework. Payee Self-Service Lite (PSS Lite) is a Web-based portal that enables users to submit and track compensation-related inquiries. This training will introduce the steps to logging into the Callidus Portal, demonstrate mastery of navigating through the application, and identify and distinguish user responsibilities with PSS Lite.

- Objective** Upon completion, students will have an understanding of the following:
- How to log into the Callidus Portal and access TrueResolution
 - General features, communication workflow overview, and the associated roles within TrueResolution
 - How to navigate through the user interface
 - Manager responsibilities including the submission and execution of new requests and routing options
 - Available actions for the Reconciler role

- Prerequisites**
- TrueComp 5.x Concepts Web-Based Training – *RECOMMENDED*

Callidus End-User Training*

Audience This course is designed for anyone requiring a basic knowledge of the full range of Callidus Web applications. This may include compensation payees, all levels of sales personnel, sales and marketing managers, IT professionals, and key decision-makers.

Duration	Delivery Method	Course Length
	Virtual Live Web	Varies based on requested modules

Description The course modules provide effective training solutions that result in productive, self-sufficient end-users. The content of the End-User Training focuses on the basic use of reports and the dashboards. Organizations have the ability to select the training modules required to meet the specific needs of their end-users. The course modules are designed to be delivered remotely and are delivered utilizing step-by-step demonstration of the tasks needed.

Module options include:

- Callidus Portal
- TrueInformation®
- Callidus TrueAnalytics™

Objective Upon completion, students will have an understanding of the following:

- Log-in procedures and basic navigation within the Callidus Portal
- Access and navigation tools within TrueInformation
- Base reports available through TrueInformation
- TrueAnalytics reports that are accessible for end-users

Prerequisites

- No course prerequisites

***NOTE: This class is scheduled by request only**

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