

# Intlock Training Program

Intlock offers a variety of training sessions and resources for end-users and administrators. This training is devised to deliver the highest level of marketing and technical competency for our solutions that include: CardioLog Analytics On-Prem, SaaS and SharePoint Marketing Suite (public internet websites) solutions for our customers and authorized partners. It also provides an in-depth understanding of how to effectively install, set-up, configure, utilize and troubleshoot the various product modules.

Our training program is the most effective way to become familiar with Intlock products and their related components, for all employees at all levels of your organization. The Intlock training program is presented by qualified product instructors who will review all of the functions of our products, as well as provide practical industry tips and personal practice sessions. If you require a training program, please [contact us](#) for further information.

- A. CardioLog Analytics On-Prem - SharePoint Intranet Portals
  - End Users
  - Administrators
- B. CardioLog Analytics SaaS - SharePoint Intranet Portals
  - End Users
- C. SharePoint Marketing Suite - Professional and Enterprise Editions
  - End User Roles
  - Administrator Roles

## A. CardioLog Analytics On-Prem - SharePoint Intranet Portals

Training available for Standard, Professional and Enterprise Editions

### End Users

This training is designed for end-users, content administrators, managers and analysts who create and share analytics reports that can be published and distributed in the following ways:

- Create scheduled reports that can be distributed through email
- Create scheduled reports that can be exported to CSV and PDF
- Publish reports within SharePoint using a Web Part or report links
- Create ad-hoc reports and view real-time reports for any and all items and pages
- Automatically produce real time reports using the CardioLog Analytics Reports SharePoint feature (Via the Site Actions menu)

Phase	Training Duration	Training Overview
<b>Phase A</b> Basic End-User Training: Part 1 (video)  <i>*High-level overview of CardioLog Analytics</i>	1.5 hours	<ul style="list-style-type: none"> <li>• What is CardioLog Analytics?</li> <li>• Introduction to the CardioLog user interface</li> <li>• Introduction to the Analysis Centre</li> <li>• How to create, generate, edit, and share reports</li> <li>• How to add, customise, and remove widgets from the dashboard</li> <li>• How to filter the date range and website item</li> <li>• Introduction to Visitor Engagement</li> <li>• Analytics reports gallery overview - basic</li> </ul>
<b>Phase B</b> Basic End-User Training: Part 2 (video)	1.5 hours	<ul style="list-style-type: none"> <li>• Understanding user roles in CardioLog</li> <li>• Filtering by users and groups, and visitor segments</li> <li>• How to set permissions and change preferences for reports</li> <li>• How to drill down on report data</li> <li>• How to export reports to Excel, PDF or Microsoft SharePoint Web Parts</li> <li>• How to set an email distribution list for scheduled reports</li> <li>• How to create reports based on templates</li> <li>• Tips for creating efficient reports</li> <li>• Analytics reports gallery overview - intermediate</li> </ul>
<b>Phase C</b> Practical <b>live</b> training workshop for end-users	1 hour	<ul style="list-style-type: none"> <li>• Re-cap Phases A &amp; B</li> <li>• Practical report-building exercises</li> </ul>

<b>Phase D</b> Advanced End-User Training: Part 1 (video)	1.5 hours	<ul style="list-style-type: none"> <li>• How to create ad-hoc reports and display real time data</li> <li>• How to search Object Explorer</li> <li>• How to select templates for an item in Object Explorer</li> <li>• How to set view permissions for items in Object Explorer</li> <li>• How to display data for deleted SharePoint items in Object Explorer</li> <li>• How to create report templates</li> <li>• How to publish reports using the CardioLog Analytics Reports SharePoint feature</li> <li>• Analytics reports gallery overview - advanced 1</li> </ul>
<b>Phase E</b> Advanced End-User Training: Part 2 (video)	1.25 hours	<ul style="list-style-type: none"> <li>• How to create and configure surveys and message bars</li> <li>• SEO Reports</li> <li>• Including metadata in reports</li> <li>• Analytics reports gallery overview - advanced 2</li> </ul>
<b>Phase F</b> Practical <b>live</b> training workshop for advanced end-users	1 hour	<ul style="list-style-type: none"> <li>• Re-cap Phases D &amp; E</li> <li>• Create surveys and message bars to engage your portal audience and collect user feedback</li> </ul>

## Administrators

This training is designed for CardioLog Analytics system administrators.

Phase	Method	Training Overview
<b>Phase A</b> Basic knowledge for administrators (video)	1 hour	<ul style="list-style-type: none"> <li>• Introduction</li> <li>• Administration center</li> <li>• System configuration</li> <li>• Data collection filters</li> <li>• Security and permissions</li> <li>• System Diagnostics</li> <li>• Importing history data using the IIS logs import tool</li> </ul>
<b>Phase B</b> Advanced training for administrators (video)	1 hour	<ul style="list-style-type: none"> <li>• System architecture</li> <li>• Infrastructure recommendations</li> <li>• Server health and performance monitoring</li> <li>• Maintenance and troubleshooting</li> <li>• CardioLog API</li> </ul>
<b>Phase C</b> Practical <b>live</b> training for administrators	1 hour	<ul style="list-style-type: none"> <li>• Administrators Q&amp;A</li> <li>• Configuring, optimizing and monitoring your system</li> </ul>

## B. CardioLog Analytics SaaS - SharePoint Intranet Portals

### End Users

This training is designed for end-users, content administrators, managers and analysts who create and share analytics reports.

- Using Power BI environment
- Using and understanding basic analytics reports
- Sharing and exporting reports in Power BI, including email, CSV and PDF
- Publication of Power BI reports within Office 365

Phase	Training Duration	Training Overview
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<b>Phase A</b> Basic End-User Training <i>*High-level overview of CardioLog Analytics SaaS</i>	1 hour	<ul style="list-style-type: none"> <li>• What is CardioLog Analytics SaaS?</li> <li>• Introduction to Power BI</li> <li>• How to use filters and slicers</li> <li>• How to drill down on report data</li> <li>• Analytics reports gallery overview - basic</li> </ul>
<b>Phase B</b> Advanced End-User Training	1 hour	<ul style="list-style-type: none"> <li>• How to export reports in Power BI</li> <li>• How to publish reports Power BI reports</li> <li>• How to subscribe to reports</li> <li>• Ask a question feature</li> <li>• Analytics reports gallery overview - advanced</li> </ul>
<b>Phase C</b> Q&A for end-users	1 hour	<ul style="list-style-type: none"> <li>• Re-cap Phases A &amp; B</li> <li>• Q&amp;A</li> </ul>

## C. SharePoint Marketing Suite - Professional and Enterprise Editions

Training available for Professional and Enterprise Editions

### End User Roles

#### 1. Web Analytics

This training is designed for end-users, content administrators, web managers and analysts who create and share analytics reports, which can be published and distributed in the following ways:

- Create scheduled reports that can be distributed through email
- Create scheduled reports that can be exported to CSV and PDF
- Publish reports within SharePoint using a Web Part or report links
- Create ad-hoc reports and view real-time reports for any and all items and pages
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<b>Phase B</b> Basic End-User Training: Part 2 (video)	1.5 hours	<ul style="list-style-type: none"> <li>• Understanding user roles</li> <li>• Filtering by users and groups, and visitor segments</li> <li>• How to set permissions and change preferences for reports</li> <li>• How to drill down on report data</li> <li>• How to export reports to Excel, PDF or Microsoft SharePoint Web Parts</li> <li>• How to set an email distribution list for scheduled reports</li> <li>• How to create reports based on templates</li> <li>• Tips for creating efficient reports</li> <li>• Analytics reports gallery overview - intermediate</li> </ul>
<b>Phase C</b> Practical <b>live</b> training workshop for end-users	1 hour	<ul style="list-style-type: none"> <li>• Re-cap Phases A &amp; B</li> <li>• Practical report-building exercises</li> </ul>

<b>Phase D</b> Advanced End-User Training: Part 1 (video)	1.5 hours	<ul style="list-style-type: none"> <li>• How to create ad-hoc reports and display real time data</li> <li>• How to search Object Explorer</li> <li>• How to select templates for an item in Object Explorer</li> <li>• How to set view permissions for items in Object Explorer</li> <li>• How to display data for deleted SharePoint items in Object Explorer</li> <li>• How to create report templates</li> <li>• How to publish reports using the CardioLog Analytics Reports SharePoint feature</li> <li>• Analytics reports gallery overview - advanced 1</li> </ul>
<b>Phase E</b> Advanced End-User Training: Part 2 (video)	1.25 hours	<ul style="list-style-type: none"> <li>• How to create and configure surveys and message bars</li> <li>• SEO Reports</li> <li>• Including metadata in reports</li> <li>• Analytics reports gallery overview - advanced 2</li> </ul>
<b>Phase F</b> Practical <b>live</b> training workshop for advanced end-users	1 hour	<ul style="list-style-type: none"> <li>• Re-cap Phases D &amp; E</li> <li>• Create surveys and message bars to engage your portal audience and collect user feedback</li> </ul>

## 2. Marketing and Optimization

This training is designed for marketers who use the SharePoint Marketing Suite website analytics and optimization tools to make informed decisions, and ensure the success of online marketing goals.

Phase	Duration	Training Overview
<b>Phase A</b> Basic knowledge for marketers (video)	1.5 hours	<ul style="list-style-type: none"> <li>• Goals and Goal Funnels</li> <li>• Visitor Segments</li> <li>• Segments based on personal information</li> <li>• A/B and Multivariate Testing</li> <li>• Behavioral Targeting</li> <li>• Campaigns</li> <li>• Shorten Links</li> <li>• Search Engine Optimization (SEO)</li> </ul>
<b>Phase B</b> Practical <b>live</b> training workshop for marketers	1 hour	<ul style="list-style-type: none"> <li>• Optimize your website by creating A/B and multivariate tests, and designing behavioral targeting rules based on your marketing goals</li> <li>• Create surveys and message bars based on your marketing requirements to engage your site audience and collect user feedback</li> <li>• Create short links and campaigns</li> </ul>

## Administrator Roles

This training is designed for SharePoint Marketing Suite system administrators.

Phase	Method	Training Overview
<b>Phase A</b> Basic knowledge for administrators (video)	1 hour	<ul style="list-style-type: none"> <li>• Introduction</li> <li>• Administration center</li> <li>• System configuration</li> <li>• Data collection filters</li> <li>• Security and permissions</li> <li>• System Diagnostics</li> <li>• Importing history data using the IIS logs import tool</li> </ul>
<b>Phase B</b> Advanced training for administrators (video)	1 hour	<ul style="list-style-type: none"> <li>• System architecture</li> <li>• Infrastructure recommendations</li> <li>• Server health and performance monitoring</li> <li>• Maintenance and troubleshooting</li> <li>• CardioLog API</li> </ul>

<b>Phase C</b> Practical <b>live</b> training for administrators	1 hour	<ul style="list-style-type: none"><li>• Administrators Q&amp;A</li><li>• Configuring, optimizing and monitoring your system</li></ul>
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