

Intelex Course Catalogue & Learning Paths Guide

Version 12
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Guidance While Reviewing This Document:

- ✓ Review the information based on a desired path or as a catalogue, whichever works best for you and your organization's needs

- ✓ Each page will outline the type of training, the recommended audience type, the duration, what you can expect from the training experience, the key learning objectives, and a knowledge check section to help you determine if a course is right for you

- ✓ Questions or requests can be raised to your Customer Success Manager or Account Executive

- ✓ More detailed course summaries and agendas are available for all platform courses upon request.

- ✓ Configured Application training experiences are best supported by scoping calls (with an Intelix Training Specialist); this training type can be more customizable to suit your needs)

- ✓ Courses names are linked to further course details within this document

Interacting with below Learning Paths

Within this document, we offer four distinct learning paths, each tailored to specific learning objectives:

1. [**Path 1 – I’m New Here \(NEW\)**](#)
2. [**Path 2 – Data-Focused \(DATA\)**](#)
3. [**Path 3 – Refresher \(REFRESH\)**](#)
4. [**Path 4 – Configuration Focused \(CONFIG\)**](#)

Each of these paths aligns with a clear goal, designed to guide users toward their desired proficiency within the INTELEX platform.

Below, you will find a curated selection of courses mapped to each goal, ensuring that users can meet their learning requirements and ultimately achieve their objectives

Path 1 – I’m New Here (NEW)	Path 2 – Data-Focused (DATA)
<p>Goal: I’m trying to increase my understanding of Intelx’s Platform, my applications, and what responsibilities I have as an Administrator.</p> <p>Application Training:</p> <p>General Usage + Admin Responsibilities</p> <p>Review: V6 System Overview & Concepts http://go.intelx.com/intelx-system-intro</p> <p>For detailed prerequisites for each individual course, please click here. If you'd like to grasp the prerequisites for the entire learning path (NEW), click here.</p>	<p>Goal: I need to improve my understanding of the Reports and Dashboards tool.</p> <p>Application Training:</p> <p>General Usage + Admin Responsibilities</p> <p>Review: V6 System Overview & Concepts http://go.intelx.com/intelx-system-intro</p> <p>For detailed prerequisites for each individual course, please click here. If you'd like to grasp the prerequisites for the entire learning path (DATA), click here.</p>
<ol style="list-style-type: none"> 1. V6 System Administration One 2. V6 Toolbars & Branding ^(NEW) 3. V6 My Tasks Summary ^(New) 4. V6 Notifications ^(NEW) 5. V6 Introduction to Reporting 6. V6 Dashboards & Home Pages 7. V6 User Security ^(NEW) 	<ol style="list-style-type: none"> 1. V6 Introduction to Reporting 2. V6 Report Object Selection ^(NEW) 3. V6 Advanced Reporting 4. V6 Report Field Tips & Tricks ^(NEW) 5. V6 Dashboards & Home Pages 6. V6 Effective Dashboards ^(NEW) 7. V6 Troubleshooting Report & Dashboard Access ^(NEW)

<p>Path 3 – Refresher (REFRESH)</p>	<p>Path 4 – Configuration Focused (CONFIG)</p>
<p>Goal: I want to revisit and reinforce my understanding of platform courses through shorter, focused learning experiences.</p> <p>Application Training: General Usage + Admin Responsibilities</p> <p>Review: FREE V6 System Overview & Concepts http://go.intellex.com/intellex-system-intro</p> <p>For detailed prerequisites for each individual course, please click here. If you'd like to grasp the prerequisites for the entire learning path (REFRESH), click here.</p>	<p>Goal: I want to make configuration changes to my existing applications or create a new application.</p> <p>Application Training: General Usage + Admin Responsibilities</p> <p>Review: FREE V6 System Overview & Concepts http://go.intellex.com/intellex-system-intro</p> <p>For detailed prerequisites for each individual course, please click here. If you'd like to grasp the prerequisites for the entire learning path (CONFIG), click here.</p>
<ol style="list-style-type: none"> 1. V6 Data Widget Overview & Interaction ^(NEW) 2. V6 Dashboard Slicers Overview & Interaction ^(NEW) 3. V6 Effective Dashboards ^(NEW) 4. V6 Toolbars & Branding ^(NEW) 5. V6 User Security ^(NEW) 6. V6 Notifications ^(NEW) 	<ol style="list-style-type: none"> 1. V6 Application Builder Series (5 sessions, optional 6th session for Mobile add on) 2. V6 Introduction to PIE ^(NEW) 3. V6 Introduction to Merge Templates ^(NEW) 4. V6 Introduction to Settings Configuration ^(NEW) 5. V6 Understanding Lookup Fields ^(NEW)

Quick Links to Course Information:

1. [V6 System Overview & Concepts](#) FREE
2. [V6 System Administration One](#)
3. [V6 System Administration Two](#)
4. [V6 Toolbars & Branding](#)
5. [V6 My Tasks Summary](#)
6. [V6 Notifications](#)
7. [V6 User Security](#)
8. [V6 Introduction to Reporting](#)
9. [V6 Advanced Reporting](#)
10. [V6 Dashboards & Home Pages](#)
11. [V6 Effective Dashboards](#)
12. [V6 Data Widget Overview & Interaction](#)
13. [V6 Dashboard Slicers Overview & Interaction](#)
14. [V6 Report Object Selection](#)
15. [V6 Report Field Tips & Tricks](#)
16. [V6 Troubleshooting Report & Dashboard Access](#)
17. [V6 Application Builder Series](#)
18. [V6 Mobile Application Builder \(Add-On\)](#)
19. [V6 Introduction to Settings Configuration](#)
20. [V6 Introduction to PIE](#)
21. [V6 Introduction to Merge Templates](#)
22. [V6 Understanding Lookup Fields](#)
23. [V6 Application Training](#)
24. [V6 EHS Incident Management: The Body Map](#)

V6 System Overview & Concepts

Type: Reference Videos

Audience: System Administrators

Duration: 6 short videos (approx. 10 minutes each)

Access: <http://go.intelx.com/intelx-system-intro>

[Please click here to review prerequisites of this course.](#)

Key Learning Objectives:

1. Understand key Intelx Terminology
2. Review Intelx core features
3. Increase readiness to maximize subsequent training experiences

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Master all essential terminology related to Location Structure, Employees, and Users.
- Articulate a comprehensive understanding of how the Location Structure enhances organizational data accessibility on the platform.

If 1 or more of these are left unchecked, consider purchasing V6 System Administrator One training. The items covered in this course are essential for Intelx System Administrators to understand to keep their Systems running smoothly and efficiently.

V6 System Administration One

Type: Platform

Audience: System Administrators

Duration: 2 Hours

[Please click here to review prerequisites of this course.](#)

Training Experience:

Training Planning Call (sold per Training Engagement)

- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intelex Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Add and modify new and existing locations in your Intelex system
2. Add and modify new and existing employees in your Intelex system
3. Assign user security and user credentials to employees

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Manually add a new location to my location structure
- Edit existing location records (address changes, archiving, etc.)
- Manually add a new employee to my Intelex System
- Give an employee user access
- Assign the user to the correct license-type, logon location, security groups, and location roles based on what the user needs to do and see in the System

If 1 or more of these are left unchecked, consider purchasing V6 System Administrator One training. The items covered in this course are essential for Intelex System Administrators to understand to keep their Systems running smoothly and efficiently.

V6 System Administration Two

Type: Platform

Audience: System Administrators

Duration: 2 Hours

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intelex Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Create or modify notification templates
2. Create or modify notification schedules
3. Create or modify custom toolbars
4. Manage custom bulletins
5. Add or modify custom branding

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Locate notification templates in my Intelex System
- Create a brand-new notification template or make needed changes to existing ones
- Add upcoming or overdue schedules to my notification templates
- Validate / troubleshoot common issues with notifications (sending/receiving)
- Create toolbars and set them as the default for specific users or a sub-set of users based on their needs
- Create, delete, share, or un-share custom bulletins
- Identify which areas of my Intelex System can be branded and set color/logo preferences accordingly

If 1 or more of these are left unchecked, consider purchasing V6 System Administration Two training.

V6 Toolbars & Branding

Type: Platform

Audience: System Administrators

Duration: 1 Hour

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intelex Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Understand toolbars: functionalities and customization options.
2. Strategic integration of branding elements: logos, colors, and design.
3. Practical insights and best practices for effective implementation.
4. Gain expertise to personalize toolbars, boost productivity, and enhance brand presence on the Intelex platform.

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Identify the location of the Intelex toolbar(s)
- Identify the branding section within the Intelex platform
- Customize toolbars with the intention for the correct user
- Customize branding (logos, colors, and design)

If 1 or more of these are left unchecked, consider purchasing V6 Toolbars & Branding

V6 My Tasks Summary

Type: Platform

Audience: System Administrators

Duration: 1 Hour

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intelix Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Understand the purpose of the My Tasks Summary application.
2. Gain insights into the system administrator's perspective regarding the application.
3. Learn strategies to maximize supervisors' abilities in managing staff tasks effectively.
4. Familiarize yourself with the tools available within the My Tasks Summary application for efficient task management.
5. Develop skills in reassigning tasks seamlessly.

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Understand the purpose of the My Tasks Summary application
- Implement strategies to maximize supervisors' abilities in managing staff tasks effectively
- Utilize the tools available within the My Tasks Summary application for efficient task management.
- Seamlessly reassign tasks
- Understand the limitations associated with reassigning tasks

If 1 or more of these are left unchecked, consider purchasing V6 My Tasks Summary training.

V6 Notifications

Type: Platform

Audience: System Administrators

Duration: 2 Hours

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intelix Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

5. Improve user adoption with notification emails.
6. Create meaningful notification emails for tasks.
7. Understand different notification types.
8. Manage existing notifications.
9. Create new notifications.
10. Get familiar with configuration menus.

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Identify the location where notification templates are stored, updated, and created.
- Explain the difference between a scheduled-based notification and a workflow-based notification.
- Create a Scheduled Notification.
- Create a Workflow Notification.
- Change or disable a Scheduled and Workflow-based Notification.

If 1 or more of these are left unchecked, consider purchasing V6 Notifications training.

V6 User Security

Type: Platform

Audience: System Administrators

Duration: 2 Hours

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intellex Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Security Terminology
2. Logon Location, License Type, Security Groups, Person Responsible
3. How Access to Intellex is determined
4. Four Layers of Intellex Access
5. Groups and how they can be leveraged
6. Security Groups vs. User Groups

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Understand the Three Layers of Security and their roles.
- Confidently Grant App Access to Users
- Adjust visible data for a user based on their location access.
- Distinguish between being in an app security group and having individual responsibilities as a Person responsible.
- Clearly understand the difference between security groups and user groups.

If 1 or more of these are left unchecked, consider purchasing V6 User Security training

V6 Introduction to Reporting

Type: Platform

Audience: System Administrators and/or Users who need to create Reports

Duration: 2 Hours

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an InteleX Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Navigate the report inventory and report builder tool
2. Understand Data Source options and considerations
3. Create or modify a List Report, Matrix Report and modify a Chart
4. Understand and set report sharing and security preferences

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Access, view, and export reports I've made or shared with me in InteleX.
- Choose the right data source for my needs.
- Expertly navigate the report builder tool.
- Create and adjust list reports with sorts, groupings, and filters.
- Create and edit matrix reports with summary functions.
- Design at least 1 chart-type report with drill-through and interactive legends.
- Share reports with relevant individuals.
- Explain report visibility and content restrictions.

If 1 or more of these are left unchecked, consider purchasing V6 Introduction to Reporting training.

V6 Advanced Reporting

Type: Platform

Audience: System Administrators and/or Users who are comfortable with the introductory reporting topics/concepts

[Please click here to review prerequisites of this course.](#)

Duration: 2 Hours

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement) and PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intellex Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Navigate and apply charting settings and review data sources
2. Create source reports and underlying data reports
3. Create or modify formula fields
4. Set and apply conditional formatting and join data sources

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Identify and use the available charting settings based on my desired data view type
- Confidently identify which data source types are best for each user
- Create and modify data widgets, including adding slicers (filters), from one or more data source(s) or leveraging existing reports
- Create and modify static widgets, including adding text, images, and links
- Add an existing widget to a new or multiple dashboards
- Anticipate how my shared widget will behave based on settings I’ve selected
- Confidently explain who can and can’t see my dashboard, and what they can see on the dashboard (widgets) and why

If 1 or more of these are left unchecked, consider purchasing V6 Advanced Reporting training.

V6 Report Object Selection

Type: Platform

Audience: System Administrators

[Please click here to review prerequisites of this course.](#)

Duration: 1 Hour

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement) and PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intellex Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Understand the impact of an application's object structure on reporting.
2. Learn to analyze and select appropriate objects for generating reports.
3. Gain proficiency in investigating object structures, particularly in OOTB EHS Incident Management.
4. Develop skills in dissecting object structures for reporting purposes in chosen applications.

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Identify the application name, objects, and fields of the applications I report on
- Select the object necessary to pull the correct fields for my report each time
- Understand how the object structure of my applications works, thus making the reporting process a seamless task in my role

If 1 or more of these are left unchecked, consider purchasing V6 Report Object Selection

V6 Report Field Tips & Tricks

Type: Platform

Audience: System Administrators

[Please click here to review prerequisites of this course.](#)

Duration: 1 Hour

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement) and PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intellex Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Manage long data source field lists to locate the correct fields efficiently.
2. Leverage special report building tools effectively for enhanced reporting.
3. Troubleshoot issues related to fields to ensure report accuracy and integrity.

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Locate the correct field within my object to display the data I would like to convey
- Understand what to do if I see multiple instances of the same record within my report
- Drill through to locate the correct layer of fields

If 1 or more of these are left unchecked, consider purchasing V6 Report Field Tips & Tricks

V6 Troubleshooting Report & Dashboard Access

Type: Platform

Audience: System Administrators

[Please click here to review prerequisites of this course.](#)

Duration: 1 Hour

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement) and PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intelx Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

- Gain confidence in troubleshooting access issues for reports and dashboards.
- Familiarize with various scenarios involving access issues.
- Learn methods to identify and resolve access problems effectively.
- Practice troubleshooting through hands-on exercises.
- Investigate and resolve three live examples in a test environment.
- Develop a comprehensive understanding of access issues impacting reports and dashboards.
- Acquire skills to support users encountering access problems.

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Confidently troubleshoot access issues to reports and dashboards
- Apply multiple methods to a Dashboard or Report issue when I encounter them

If 1 or more of these are left unchecked, consider purchasing V6 Troubleshooting Report & Dashboard Access

V6 Dashboards & Home Pages

Type: Platform

Audience: System Administrators and/or Users who need to create Dashboards

Duration: 2 Hours

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement) and PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intellex Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Navigate the dashboard inventory and dashboard builder tool
2. Create or modify Data Widgets and Static Widgets
3. Use and understand Search Widget function and apply Widget sharing
4. Understand and set Dashboard sharing and security preferences
5. Create and assign a Home Page

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Access, view, and export existing dashboards that I created or that are shared with me in Intellex
- Confidently navigate the dashboard builder tool, including the widget list, settings panel, and the icon toolbar
- Create and modify data widgets and static widgets, including adding slicers (filters), from one or more data source(s) or leveraging existing reports
- Add an existing widget to a new or multiple dashboards
- Anticipate how my shared widget will behave based on settings I’ve selected
- Confidently explain who can and can’t see my dashboard, and what they can see on the dashboard (widgets) and why
- List the available options and create a Home Page, along with assigning it to users

If 1 or more of these are left unchecked, consider purchasing V6 Dashboards & Home Pages

V6 Effective Dashboards

Type: Platform

Audience: System Administrators and/or Users who need to create Dashboards

Duration: 2 Hours

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intelx Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Understanding how to design a user-centric dashboard that effectively communicates and maximizes data intake.
2. Addressing common pitfalls in dashboard design and collaborating on best practices for a positive user experience.

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Use my skills to strategize and articulate dashboard objectives and select the appropriate tools.
- Use advanced features to create user-friendly dashboards for a seamless experience.
- Identify common pitfalls in dashboard design.
- Understand industry best practices for conveying the purpose and message of a dashboard effectively.

If 1 or more of these are left unchecked, consider purchasing Effective Dashboards training.

V6 Data Widget Overview & Interaction

Type: Platform

Audience: System Administrators and/or Users who need to create Dashboards

Duration: 1 Hour

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an InteleX Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Understand data widget development terminology and navigation.
2. Gain a clear understanding of the use cases for data widget utilization.
3. Explore various types of data widgets.
4. Live interaction and development of data widgets within a dashboard.

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Navigate to the Dashboards tab and create a dashboard that houses multiple widget types.
- Locate where data widget options are stored and have a clear understanding of the correct widget type to select based on my data communication need.
- Identify the difference between developing a data widget and creating a report in the Report Builder Interface.
- Confidently manage my data widgets after creation.

If 1 or more of these are left unchecked, consider purchasing Data Widget training.

V6 Dashboard Slicers Overview & Interaction

Type: Platform

Audience: System Administrators and/or Users who need to create Dashboards

Duration: 1 Hour

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intelx Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Understand Slicer development terminology and navigation.
2. Gain a clear understanding of the use cases for slicer utilization.
3. Explore many ways slicers can serve as an intuitive front-end filter.
4. Live interaction and development of slicers within a dashboard.

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Navigate to the Dashboards tab and create a dashboard that houses multiple slicers.
- Confidently locate the field I would like to filter my data widget by.
- Easily select the data widget(s) I would like my slicer to interact with.
- Use best practices to ensure that my end users understand how to use the slicers with a user-centric dashboard design in mind
- Manage my slicers after creation.

If 1 or more of these are left unchecked, consider purchasing Slicer training.

V6 Application Builder Series

Type: Platform

Audience: System Administrators

Duration: 2 Hours each (5-part series)

[Please click here to review prerequisites of this course.](#)

Training Experience Highlights: Training Planning Call (sold per Training Engagement)

- ✓ PPTX in editable format (Standard)
- ✓ Interactive training sessions delivered by an Intelex Training Specialist (5-part series)
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Navigate the Application Configuration tool
2. Create or modify applications, objects, fields, and/or tabs
3. Create or modify views (detail and inventory)
4. Create or modify workflows and/or workflow-based notifications
5. Create and set user groups and associated permissions
6. Create or modify advanced configuration settings (source code, business rules, view actions, action handlers)

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Confidently use Intelex Application Configuration concepts and terminology
- Make configuration changes to include or remove fields or look-up values
- Add new workflow-based notifications, including adding them to the workflow and setting who the recipients will be
- Change how my views are laid out and formatted (ex. the order in which the fields appear)
- Include stage containers to my views to show/hide various elements Include logic to drive data integrity (ex. record cannot be created in the past)
- Leverage view actions to show or hide fields based on data entries
- Create my own simple application from start to finish, with a workflow and security
* (note: an additional license is required to build your own applications in Intelex)

If 1 or more of these are left unchecked, consider purchasing the V6 Application Builder Series.

V6 Mobile Application Builder (Add-On)

Type: Platform

Audience: System Administrators

Duration: 2 Hours

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an InteleX Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Enable an existing browser application for Mobile use
2. Understand how source code needs to be modified for Mobile use
3. Understand how security needs to be modified for Mobile use

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Modify mobile source code to only include relevant stages/fields
- Modify dropdowns for quick and easy access
- Update workflow to include mobile options
- Understand the limits of mobile configuration vs browser configuration
- Understand the best practices for how/when mobile should be used for an application
- Set mobile security permission

If 1 or more of these are left unchecked, consider purchasing the V6 Mobile Application Builder (Add-On).

V6 Introduction to Settings Configuration

Type: Platform

Audience: System Administrators

Duration: 2 Hours

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intellex Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Creating a Settings tab in an application with secure tab setup and menu configuration.
2. Adding relation and lookup field libraries, including recommended methods for each.
3. Granting modify access to lookup value lists for multiple security groups.
4. Enabling the inactivate function for relation field libraries to enhance maintenance capabilities.

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Understand the benefits of utilizing a Setting Tab within an application
- Create Settings tab within an application
- Configuring menus with relation and lookup field libraries
- Establish and assign security surrounding Setting Tab
- Comfortably maintain Settings Tab

If 1 or more of these are left unchecked, consider purchasing the V6 Introduction to Settings Configuration.

V6 Introduction to Merge Templates

Type: Platform

Audience: System Administrators

Duration: 2 Hours

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an InteleX Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Understand the intended purpose of a Merge Template
2. Outline and interact with steps involved in the development of a Merge Template
3. Clear understanding of security capabilities in the development and utilization of a Merge Template

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Explain why a Merge Template would be used
- Navigate to where a Merge Template would be located
- Develop a Merge Template
- Understand the security capabilities of a Merge Template
- Understand the terminology used in the development and maintenance processes of a Merge Template

If 1 or more of these are left unchecked, consider purchasing Merge Template training.

V6 Introduction to PIE

Type: Platform

Audience: System Administrators

Duration: 2 Hour

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intelx Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Understand the intended purpose of PIE
1. Outline and interact with steps involved in enabling Package Designer/Installer
2. Outline and interact with steps involved in Package development
3. Outline and interact with steps involved in Installing Package
4. Clear understanding of security capabilities in the development and utilization of a PIE

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Explain why PIE would be used
- Create a PIE Package
- Install a PIE Package
- Understand the security capabilities of PIE
- Understand the terminology used in the development and maintenance processes of PIE

If 1 or more of these are left unchecked, consider purchasing PIE training.

V6 Understanding Lookup Fields

Type: Platform

Audience: System Administrators

Duration: 1 Hour

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an InteleX Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Understand the various functionalities of lookup fields and how they operate
2. Explore different customization options to tailor lookup fields to specific needs
3. Discover how to strategically apply lookup fields across the InteleX platform for enhanced data management
4. Acquire skills to efficiently configure and manage lookup fields to maintain data consistency and accuracy
5. Learn practical insights and best practices to optimize the use of lookup fields and streamline data entry processes

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Explain the functionalities and benefits of lookup fields within the InteleX interface
- Customize lookup fields to meet specific needs and requirements
- Strategically apply lookup fields across the InteleX platform to enhance data management
- Efficiently configure and manage lookup fields to ensure data consistency and accuracy
- Implement best practices and practical insights to streamline data entry processes

If 1 or more of these are left unchecked, consider purchasing Understanding Lookup Field training

V6 Application Training

Type: Platform

Audience: System Administrators

Duration: 2 Hour (Typically)

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intelex Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Ability to navigate the application (from various viewpoints)
2. Understand the security groups and location roles the application leverages
3. Understand the application workflow(s)
4. Ability to create records and run them through the workflow
5. Understand and identify who is responsible for task completion throughout the workflow
6. Create, modify, or maintain front-end application settings (Ex. settings tab)

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Quickly and confidently navigate to specific pages or records within my application
- Put specific users in the correct security group or location role based on desired interaction type
- Explain the possible paths records in my application can take based on the configured workflow(s)
- Accurately identify what needs to be entered / completed to move a record through the workflow along with who is responsible

- Manage or modify front-end application settings along with how these settings impact the usage of the application

If 1 or more of these are left unchecked, consider requesting an application training scoping call to speak with an Intelex Training Specialist about your application training needs.

V6 EHS Incident Management: The Body Map

Type: Platform

Audience: System Administrators

Duration: 1 Hour

[Please click here to review prerequisites of this course.](#)

Training Experience:

- ✓ Training Planning Call (sold per Training Engagement)
- ✓ PPTX in editable format (Standard)
- ✓ Interactive training session delivered by an Intelex Training Specialist
- ✓ Recording of the session (remote-only)

Key Learning Objectives:

1. Understanding general navigation of the EHS Incident Management Application
2. Ability to identify the security groups/person responsible that can interact with the body map within the workflow
3. Ability to identify the security groups that can interact with the body map within the settings tab
4. Clear understanding of the difference between the body map within the settings tab and within the workflow
5. Demonstration and interaction of body map grid within the workflow
6. Demonstration and interaction of how to maintain and add injuries/illnesses within the settings tab
7. Understanding the Data import process within the setting tab

Knowledge Check! Can you confidently finish the sentence “I can” using the phrases below?

- Navigate to the EHS Incident Management application and locate where body mapping is configured within the setting tab.
- Update, create, or import injury/illnesses within the settings tab.

- Find the body map within the injury/illness workflow.
- Report injury/illness information via the body part map within an incident report.

If 1 or more of these are left unchecked, consider purchasing V6 EHS Incident Management: The Body Map

Prerequisites Per Course

Listed below are the courses available. Please take note of important considerations such as "Avoid Pairing" and "Recommended but not required" to optimize your learning journey for both you and your team.

V6 System Overview & Concepts

Prerequisites:

- No Prerequisites

V6 System Administration One

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>

V6 System Administration Two

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)

V6 Toolbars & Branding

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)

Avoid Pairing:

- Avoid pairing [V6 Toolbars and Branding](#) with [System Administration Two](#), as they inherently cover the same material. Opting for the Toolbars and Branding course alone is ideal for looking for a refresher on the topic without attending the two-hour System Administration Two training that covers other topics; thus, offering a targeted refresher on Toolbars and Branding.

V6 My Tasks Summary

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)

Recommended but not required:

- [V6 User Security](#)

V6 Notifications

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)

Do not need [System Administration Two](#) (Or [Toolbars & Branding](#)) in Order to take the [V6 Notifications Course](#)

V6 User Security

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)

V6 Introduction to Reporting

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)

Recommended but not required:

- [V6 User Security](#)

V6 Advanced Reporting

Prerequisites:

- [FREE V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [Introduction to Reporting](#)

Recommended but not required:

- [V6 User Security](#)

[V6 Report Object Selection](#)

Prerequisites:

- [FREE V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [Introduction to Reporting](#)

[V6 Report Field Tips & Tricks](#)

Prerequisites:

- [FREE V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [Introduction to Reporting](#)
- [V6 Report Object Selection](#)
- [Advanced Reporting](#)

[V6 Troubleshooting Report & Dashboard Access](#)

Prerequisites:

- [FREE V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [Introduction to Reporting](#)
- [V6 Dashboards & Homepages](#)

[V6 Dashboards & Home Pages](#)

Prerequisites:

- [FREE V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)

- [Introduction to Reporting](#)

Recommended but not required:

- [V6 User Security](#)

V6 Effective Dashboards

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [Introduction to Reporting](#)
- [V6 Dashboards & Home Pages*](#)

Recommended but not required:

- [V6 User Security](#)

*While completing [V6 Dashboards and Home Pages](#) is a prerequisite for maximizing the value of the [V6 Effective Dashboards](#) course, they don't necessarily need to be bundled together. In fact, if you have prior training in Dashboarding and Home Pages (perhaps in an earlier implementation) and feel reasonably proficient with the concepts, opting for the V6 Effective Dashboards is the optimal choice to elevate your skill set. However, if you lack exposure to Dashboarding and Home Pages, it is crucial to prioritize the V6 Dashboards and Home Pages course initially and then follow the course up with Effective Dashboards.

V6 Data Widget Overview & Interaction

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [Introduction to Reporting](#)

This course serves as a refresher specifically for a smaller concept covered in the [V6 Dashboards & Home Pages](#) training. For a comprehensive understanding of creating Dashboards or Home Pages, enrolling in the V6 Dashboards & Home Pages training is recommended. Nevertheless, **if you've previously taken this course and are seeking a refresher solely for understanding how Data Widgets operate, the ideal choice is the V6 Data Widget Overview and Interaction course.**

V6 Dashboard Slicers Overview & Interaction

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [Introduction to Reporting](#)

This course serves as a refresher specifically for a smaller concept covered in [the V6 Dashboards & Home Pages](#) training. For a comprehensive understanding of creating Dashboards or Home Pages, enrolling in the V6 Dashboards & Home Pages training is recommended. **Nevertheless, if you've previously taken this course and are seeking a refresher solely for understanding how Data Widgets operate, the ideal choice is the V6 Dashboard Slicers and Interaction course.**

V6 Application Builder Series

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [V6 Notifications](#) OR [System Administration Two](#)

Recommended but not required:

- [V6 Application Training](#)
- [V6 User Security](#)

V6 Mobile Application Builder (Add-On)

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [V6 Notifications](#) OR [System Administration Two](#)
- [V6 Application Builder](#)

Recommended but not required:

- [V6 Application Training](#)
- [V6 User Security](#)

V6 Introduction to Settings Configuration

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [V6 Notifications](#) OR [System Administration Two](#)
- [V6 Application Builder](#)

Recommended but not required:

- [V6 Application Training](#)
- [V6 User Security](#)

V6 Introduction to PIE

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)

Recommended but not required:

- [V6 Application Training](#)
- [V6 Application Builder](#)

V6 Introduction to Merge Templates

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)

Recommended but not required:

- [V6 Application Training](#)
- [V6 Application Builder](#)

V6 Understanding LookupV6 Understanding Lookup Fields

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)

Recommended but not required:

- [V6 Application Training](#)

V6 Application Training

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [V6 Notifications](#) OR [System Administration Two](#)

Recommended but not required:

- [V6 Application Training](#)
- [V6 User Security](#)

V6 EHS Incident Management: The Body Map

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [System Administration One](#)
- [V6 Notifications](#) OR [System Administration Two](#)
- [V6 EHS Incident Management](#)

Recommended but not required:

- [V6 User Security](#)

Prerequisites Learning Path

If you and your team are considering taking all the courses within a Learning Path, you may prefer a concise listing of prerequisites and recommendations. Please refer to the list below for details.

Taking all Path 1 – I’m New Here (NEW)

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>

Taking all Path 2 – Data-Focused (DATA)

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intellex.com/intellex-system-intro) <http://go.intellex.com/intellex-system-intro>
- [V6 System Administration One](#)

Recommended but not required:

- [V6 User Security](#)

While completing the [V6 Dashboards and Home Pages](#) lays a strong foundation for maximizing the value derived from the [V6 Effective Dashboards](#) course within this path, they need not necessarily be packaged together. In fact, if you already possess prior training in Dashboarding and Home Pages, perhaps from an earlier implementation, and feel adequately proficient with the underlying concepts, opting for the V6 Effective Dashboards alone would be the optimal choice to enhance your skill set. However, for those lacking exposure to Dashboarding and Home Pages, it is imperative to prioritize the V6 Dashboards and Home Pages course initially, followed by the Effective Dashboards course. Remember, merely because the courses are bundled together does not mandate the completion of every single one. It is crucial to carefully review each course description within the bundle to ensure its relevance and suitability for both you and your team.

Taking all Path 3 – Refresher (REFRESH)

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intelelex.com/intelelex-system-intro) <http://go.intelelex.com/intelelex-system-intro>
- [V6 System Administration One](#)

Taking all Path 4 – Configuration Focused (CONFIG)

Prerequisites:

- FREE [V6 System Overview & Concepts](http://go.intelelex.com/intelelex-system-intro) <http://go.intelelex.com/intelelex-system-intro>
- [System Administration One](#)

Recommended but not required:

- [V6 User Security](#)
- [Application Training](#)

Please bear in mind that while it's not mandatory for you and your team to complete every single course in this path, it's essential to understand the specific prerequisites for each course. The V6 Application Builder consists of a comprehensive 5-part training series. Additionally, there's an optional extension to this course known as V6 Mobile, which would expand the series to 6 courses. It's important to note that V6 Mobile cannot be purchased separately; it must always be bundled with the Application Builder if desired.

Interested in scheduling training or learning more?

Please reach out to your Customer Success Manager or Account Executive to request training / scoping call or to raise any questions you have. More detailed course summaries and agendas are available for all platform type courses.

If you do not have a CSM contact, please reach out to CSM@intelex.com

We offer the flexibility of delivering our courses either onsite at your location or through online sessions. Further, pricing for online training and remote training differ.