Explore Training

Autonomy Education is an essential training program that enables you to get the most out of Explore and other Autonomy software. Combining both theory with practical lessons, the Autonomy training program makes sure the participant understands the capabilities and features of the software before configuring and running the technology.

Autonomy training is heavily oriented toward hands-on practical experience to reinforce formal classroom instruction. Using fast-track training methods, the majority of the training takes place in a workshop environment that challenges the participant and reinforces the learning process.

Course Name: Explore Training
Duration of course: 1 Day

Audience:
- Software Administrators
- Business Analysts
- Quality Analysts
- Anyone that uses Explore to view results and run reports

Prerequisites:
- None

Training Format: The course is composed of lectures followed by hands-on practical exercises.

Course Outline: This training prepares the participants to administer users, create searches, play recordings (where applicable), view documents, view results, and print reports using Explore.

Course Agenda:
The Explore training provides:
- 1 day of hands-on training
- Detailed training materials

Classroom Capacity:
Autonomy maintains small class sizes (10–12) in order to provide adequate individual attention.

Booking Private Training (onsite and online):
Please contact autonomyeducation@hp.com for details of private training availability and training fees. Private training can be done at the customer location or as Virtual Instructor-Led Training (VILT) delivered online.
Course Curriculum:
The Autonomy training program covers a range of subjects to allow the trainee to grasp all aspects of the technology.

Training Room Requirements:
- A workstation for each participant with access to the Explore software
- A projection system connected to the instructor’s computer
- A whiteboard or easel with markers
- A workstation for the instructor with access to the Explore software
- Verification of a fully functional Explore system.
- Please note: it is the customer’s responsibility to have the Explore software installed and functional from the workstations before the start of the training.

Agenda

<table>
<thead>
<tr>
<th>Lesson:</th>
<th>Objectives:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Introduction and Overview</td>
<td>▪ Describe the key features of the Explore software</td>
</tr>
</tbody>
</table>
| 2) Navigating the Explore Workspace | ▪ Log into Explore  
                                  | ▪ Change your password  
                                  | ▪ Navigate the Explore interface |
| 3) Overview of the Explore Tabs | ▪ Describe the functions of the Home, Search, Analyze, and Administer tabs |
| 4) The Home Tab                | ▪ Configure Watched Topics  
                                  | ▪ Use the Topic options: cloud, list, chart, and cluster views  
                                  | ▪ Use the Search tools  
                                  | ▪ Use the Results tools |
| 5) An Introduction to Searching | ▪ Define Documents  
                                  | ▪ Define Multichannel Searches  
                                  | ▪ Define Boolean and Logical Searches  
                                  | ▪ Define Proximity Searches  
                                  | ▪ Define Exact Phrase Searches  
                                  | ▪ Define File Restriction Searches  
                                  | ▪ Define Field Text Searches  
                                  | ▪ Define Parametric Searches  
                                  | ▪ Define Soundex Keyword Searches  
                                  | ▪ Define Synonym Searches  
                                  | ▪ Define Conceptual Matching |
| 6) Performing Searches         | ▪ View the Search Results list  
                                  | ▪ Use the Concise and Detail views  
                                  | ▪ Open results in a new window  
                                  | ▪ Tag results  
                                  | ▪ Use the Chart view  
                                  | ▪ Run reports from the Results view  
                                  | ▪ Export results |
| 7) Using the Topics List       | ▪ Use Global and Personal Topics  
                                  | ▪ Use the Topic Panel options: cloud, chart, list, and clusters  
<pre><code>                              | ▪ Define the Topic Name Size options |
</code></pre>
<table>
<thead>
<tr>
<th>Lesson:</th>
<th>Objectives:</th>
</tr>
</thead>
</table>
| 8) Create Saved Searches | • Define a Search  
• Save a Search  
• Edit a Saved Search  
• View Recent Searches |
| 9) Viewing Search Results | • Use Detailed and Concise views  
• Hide Search Collections and Results tools  
• Sort the Results list  
• Open an item in the Results list  
• Use the Results shortcut menu  
• Filter the Results list |
| 10) Using the Media Player | • Play a recording using the Media Player (where applicable) |
| 11) Using the Results Tool | • Tag documents |
| 12) Viewing Clusters, Trends, and Hot & Breaking | • View Clusters  
• View Trends  
• View Hot & Breaking  
• Run Reports  
• Print charts |
| 13) Managing Users | • Add, edit, and delete users |
| 14) Managing Tags | • Add, edit, and delete tags |
| 15) Maintaining the Lexicon | • Add, edit, and delete items in the Lexicon |
| 16) Summary | • Questions and Answers  
• Review of topics |