



TrackWise Training Catalog



TrackWise[®]
by Sparta Systems

TrackWise® Training Classes for IT and QA Professionals

Sparta Systems, makers of TrackWise®, is proud to present you with a training program that will empower your software installation team members and support personnel. The TrackWise Training Program is composed of multiple distinct courses that will reward its students with world-class knowledge of the TrackWise suite of applications, enabling your team to maximize your company's return on investment.

Courses are held either at Sparta Systems' corporate headquarters or in designated regional locations. Each student will be provided with a designated computer for his/her own personal use during the course sessions. Some courses are also available online via eLearning, enabling access right from your desktop. On-site group training is also available at your location upon request.

It is our objective to provide you and your staff the best possible training experience in order to maximize your implementation and use of the TrackWise enterprise quality management solution. Please contact our Training Manager for more information regarding these classes and availability.

Each course provides hands-on experience in a classroom setting. Training manuals are provided for each session.

Courses include:

- Introduction to TrackWise
- Technical Fundamentals of TrackWise
- Introduction to Configuration and Administration
- Intermediate Configuration and Administration
- Advanced Configuration and Administration
- Crystal Reports® Design for TrackWise
- Advanced Crystal Reports Design for TrackWise
- TrackWise Boot Camp
- New Features and Enhancements– Upgrading to TrackWise 8®
- Upgrading to TrackWise® 8.0
- Training Manager
- Audit Execution Package

Course descriptions and outlines are detailed on the following pages.

For further information and to obtain course schedules and locations visit us at:

<http://www.spartasystems.com/services/training-and-education>.

You may also contact Training at 888-261-5948 (United States) and +972-9-972-6023 (Europe, Middle East, Africa, and Asia)

Introduction to TrackWise®

Prerequisites: None

Audience: New TrackWise users who plan to take more advanced courses, System Administrators, IT Support Personnel, TrackWise end users

Duration: 2 Days

Course Description

This introductory course provides a thorough overview for a basic understanding of TrackWise as an event tracking and action resolution tool. It is meant for users who have no previous TrackWise experience. It is also recommended for system administrators who plan to take the Configuration and Administration curriculum. Course curriculum provides an explanation of the TrackWise architecture, its components, including Admin Configuration Tools and Integration Manager, and the benefits and usage of tools such as Configuration Migrator and the Audit Execution Package. This course also includes hands-on exploration of TrackWise, explaining system functionality and capabilities. Also included is discussion on how to prepare for a successful implementation of TrackWise using Sparta Systems' on-site professional services capabilities.

Course Topics/Outline

Overview, benefits and usage of TrackWise tools, specifically:

- TrackWise
- Admin Configuration
- TrackWise Integration Manager Web Services
- TrackWise Configuration Migrator
- Audit Execution Package
- TrackWise Proficiency Pak (TPP)
- Preconfigured TrackWise
- Discussion of planning & preparing for successful implementation
- TrackWise exploration
- TrackWise system structure and navigation
- TrackWise terminology & concepts, e.g., workflow, states, activities, and locking
- Data entry, updates & audit trails
- Built-in ad hoc search, full text search & integrated reporting
- Dashboard views for more effective task management
- Help Desk management & local administration
- The TrackWise Coordinator —24/7 business rule engine

Technical Fundamentals of TrackWise®

Prerequisites: TrackWise experience/Basic understanding of OS/Network/Database support

Audience: System Administrators, IT & IS Support, Help Desk, Database Administrators

Duration: 2 Days

Course Description

The Technical Fundamentals course is designed to empower IS and IT support personnel to provide efficient and complete services during and after the TrackWise implementation process. Course curriculum covers all aspects of supporting a TrackWise production environment. Within this course, students learn the technical architecture of TrackWise, system requirements and the installation process. In addition, this course covers configuration and administration of the TrackWise Web Administrator Configuration Migrator tool. Students will participate from start to finish in mastering the steps required for a successful migration.

Course Topics/Outline

- Application/web server (infrastructure
- Directory security/local admin privileges
- Database server (setup)
- Multiple database users/synonyms
- TrackWise services
- Database connectivity parameters
- Troubleshooting /logs
- Oracle client
- Client rollout setup/implementation
- Installation of products
- Reinstalling components
- Ongoing maintenance
- Database backup/recovery
- Introduction to Migrator
- Requirements & server setup
- Configuration (what is/is not migrated)
- Migration paths
- Migrator configuration
- Determining migration paths
- Snapshot preparation & execution
- Making configuration changes with snapshot in place
- Performing a migration & verification
- Management of migration environments
- Performing upgrades in the migration path
- Migration Dos & Don'ts
- Strategies for post-migration configuration

Introduction to TrackWise® Configuration and Administration

Audience: System Administrators, IT and IS Support Personnel, Business Owners, Project Managers, Project Team Members

Duration: 5 Days

Course Description

Introduction to TrackWise Configuration and Administration is a course designed to teach you how to configure a simple TrackWise project from start to finish. This course introduces the user to TrackWise configuration for a basic tracking process. Once the project has been configured, students will test it in TrackWise. In addition to configuring a project, students will learn to establish parameters for the TrackWise Coordinator®, the automatic service for executing business rules in TrackWise. This course also covers the additional responsibilities a TrackWise Administrator assumes, such as creating log-in accounts, Help Desk and monitoring tools.

Course Topics/Outline

- Introduce division and project concept
- Create a project
- Create data field for configuration forms
- Define project member access to form fields and activities based on group categories
- Activate audit trail monitoring for record updates
- Define the user's default desktop layout and create additional desktop layouts
- Define states and activities for project workflow
- Configure workflow for a project
- Test the configured project
- Configure the TrackWise Coordinator for general records upkeep
- Create user log-in accounts
- Use the Help Desk function to manage user accounts
- Use "monitor for log-off" requests and record unlocking
- Import data into Web Admin via the TrackWise Integration Manager

Intermediate TrackWise® Configuration and Administration

Prerequisites: Introduction to TrackWise Configuration and Administration

Audience: System Administrators, IT and IS Support Personnel, Business Owners, Project Managers, Project Team Members

Duration: 4 Days

Course Description

Intermediate TrackWise Configuration and Administration goes into great detail regarding project design from a strategic, business-specific perspective. This particular course relies on pre-established business rules typical for an industry-specific tracking process.

Students will be given a work plan checklist to assist them in gathering business requirements for configuration. The course will focus on the configuration of a project. In addition, it will cover different configurable settings and address additional features of the TrackWise Coordinator used to automate many rules concerning the configuration.

Course Topics/Outline

- Discuss information needed for gathering business requirements
- Identify steps to define workflow design specifications
- Create grids within configuration forms
- Discuss and configure: schedulable activities, perform-only activities, parallel approvals
- Create notification templates
- Configure conditionally required field classes
- Utilize virtual group categories
- Validate the project created during class
- Auto-assign records
- Configure TrackWise Coordinator to:
 - Administer triggers
 - Issue notifications
 - Check recurring activities
 - Generate child records
 - Determine when (or if) records should be updated
 - Auto-assign records
 - Generate auto reports
 - Auto-export record data

Advanced TrackWise® Configuration and Administration

Prerequisites: Introduction to TrackWise Configuration and Administration, Intermediate TrackWise Configuration and Administration or Configuration and Utilities (retired) and TrackWise Coordinator (retired)

Audience: System Administrators, IT and IS Support Personnel, Business Owners, Project Managers, Project Team Members

Duration: 3 Days

Course Description

Advanced TrackWise Configuration and Administration completes the TrackWise Configuration and Administration curriculum by providing an insight into the globalization of TrackWise across multiple sites and locations. With TrackWise configured as a global application, all users will refer to one application when tracking various kinds of records. In addition, features such as auto trending, auto alerts, hidden fields with virtual group categories, and various other configurable options will be presented in a way that will enable students to get the most out of the TrackWise system.

Course Topics/Outline

- Discuss TrackWise implementation at multiple locations
- Create multiple divisions containing multiple projects
- Define user roles to provide membership to multiple divisions/projects
- Create global dashboards to monitor records from multiple divisions/projects and distribute to users
- Configure TrackWise Coordinator to account for various time zones
- Employ TrackWise Coordinator priority groups
- Utilize multiple TrackWise Coordinator services
- Explore:
 - Auto trending
 - Auto alerts
 - Decision trees
 - Hidden fields
 - External fields

Crystal Reports Design for TrackWise®

Prerequisites: Sparta Systems recommends Introduction to TrackWise or previous TrackWise experience/Technical Fundamentals of TrackWise/Introduction to Configuration and Administration

Audience: Any person who will be designing and developing Crystal Reports for their TrackWise implementation. This may include Project Managers, Team Members, Power End Users, Application Administrators, IS Support Personnel.

Duration: 4 Days

Course Description

The Crystal Reports Design for TrackWise course is intended to provide report writers a basic understanding of the Crystal Reports application and the TrackWise database structure. This hands-on course includes the creation of sample reports for a TrackWise implementation. A strong emphasis is placed on FDA-regulated industry examples and usage in a cGxP-regulated environment.

Course Topics/Outline

- Update schema/creation of views
- Table linking and schema overview
- Tabular reports
- Single-record reports
- Parent-Child reports
- Multi-field reporting
- User-defined fields in reports
- Parameters
- Headers/Footers/Typical cGxP Compliance concerns
- Select expert
- Grouping (group by formulas)
- Formulas (data manipulation)
- Running totals
- Cross tabulations
- Charts (graphing)
- Trend reporting
- GMT Conversion/Skew
- Activity History
- Configuration reports (provided by Sparta Systems)
- Troubleshooting reports
- Report validation and promotion
- Directory security/Permissions
- Coordinator integration (AutoReports)

Advanced Crystal Reports Design for TrackWise®

Prerequisites: Crystal Reports Design for TrackWise

Audience: Recommended 1+ years experience developing Crystal Reports

Duration: 3 Days

Course Description

The Advanced Crystal Reports Design for TrackWise course is designed to expose report writers to advanced functionality in the Crystal Reports application while focusing on business-specific TrackWise scenarios.

Course Topics/Outline

- Working with TrackWise UDF fields
- Working with TrackWise external fields
- Working with multiple PR tables
- Advanced cross-tabulation techniques (including forcing text labels for multi-row summary, conditional formatting, cross-tab mimic with multiple column formatting)
- Advanced charting (including drill-down reports, dual-axis charts, Top N charts, underlay functionality with charts)
- Formatting tips & tricks (including hyperlinking to PR records, alternating background colors, repeated group headers, subreports)
- Multi-pass reporting
- Cycle time, workflow and rolling date reports
- Evaluation time of formulas (understanding record processing before reading, while reading, while printing)
- Grouping & sorting (including specified order, hierarchical grouping, summary functions)
- Variables (including running totals, shared variables, and filtering subreports to display related data content, reinitializing based on grouping)
- Formulas & functions (including concentration on built-in functions and creating custom functions)
- Control Structures—Select Case and For Loop Logic
- Arrays and Ranges—Subscripting, Variables, Logic Construct

TrackWise® Boot Camp

Prerequisites: Basic Understanding of OS/Network/Database/Applications support

Audience: System Administrators, IT and IS Support Personnel, Business Owners, Project Managers, Project Team Members

Duration: 10 Days

Course Description

The TrackWise Boot Camp course is designed to enable individuals to quickly familiarize themselves with the TrackWise product suite. This fast-paced course provides a basic understanding of the individual components in the TrackWise product suite and the benefits and usage of the tools. This intense course covers the major topics from our core classes (Introduction to TrackWise, Technical Fundamentals of TrackWise, Introduction to TrackWise Configuration and Administration, Intermediate TrackWise Configuration and Administration, and Crystal Reports Design for TrackWise), with an emphasis on hands-on instruction in the configuration of TrackWise. This class is designed as an alternative learning path for experienced IT and consulting professionals to quickly get up to speed on the TrackWise suite of products. Participation in this class will provide basic knowledge needed to configure TrackWise but does not go into the depth of each individual core class.

Course Topics/Outline

- Introduction to TrackWise
- Overview, benefits and usage of TrackWise product suite
- TrackWise exploration
- Application/Web/Database Server setup
- Installation of TrackWise products
- Migrator overview
- 11 steps to configuring a project (process groups, data fields, selection values, dependent fields, group categories, configuration form, audit trail, states and activities, project and user permissions)
- TrackWise field and project configuration classes
- Steps to TWC configuration (admin query, admin scope, admin schedule, admin activities)
- Introduction to Crystal Reports and basic report design for TrackWise

New Features and Enhancements– Upgrading to TrackWise 8®

Prerequisites: TrackWise Configuration and Utilities (retired) and TrackWise Coordinator (retired) / TrackWise Experience in Configuration and Administration - Course for customers upgrading from Version 7 to Version 8

Audience: System Administrators, IT and IS Support Personnel, Business Owners, Project Managers, Project Team Members

Duration: 1 Day Course

Course Description

The New Features and Enhancements– Upgrading to TrackWise 8 course is designed to teach TrackWise System and Local Administrators the new features and configuration changes from TrackWise Version 7 to Version 8, The course is designed to show how process groups are created, configuration is associated to these process groups, and how they are migrated. Finally, students will be introduced to new time-saving features created for managing process group configuration in TrackWise 8..

The class focuses on best practices for configuration management in a TrackWise 8.0 environment.

Course Topics/Outline

Overview, benefits and usage of TrackWise tools, specifically:

- Introduction to TrackWise 8
- New features and functionality of TrackWise 8
- Post Upgrade Process
- TrackWise 8 and configuration management
- TrackWise Configuration Migrator
- Process Group Configuration
- Coordinator Configuration Management
- Introducing Configuration Migrator

Upgrading to TrackWise® 8.0

Prerequisites: Supporting TrackWise from an IT Perspective/Technical Fundamentals/Introduction to TrackWise Configuration and Administration

Audience: System and Local Administrators, IT Support, and Computer Systems Validation project team members

Duration: 2 Days

Course Description

The Upgrading to TrackWise Version 8.0 course presents TrackWise System and Local Administrators, IT Support, and Computer Systems Validation project team members with a detailed explanation of the upgrade. The actual work process for conducting the upgrade from 7.0 to 8.0 is reviewed in hands-on exercises that will enable the student to conduct these activities independently at their own company.

In addition to the upgrade process, the class focuses on best practices for configuration management in a TrackWise 8.0 environment.

Course Topics

- Introduction to 8.0
- High-level overview of the features and benefits of 8.0
- Taxonomical recommendations (e.g., how to organize configuration into different process groups) as well as several new work processes:
 - Configuration of a process group
 - Association of configuration to process groups
 - Coordinator Configuration Management in TrackWise 8.0
 - Duplication of configuration across process groups
 - TrackWise 8.0 system requirements
 - Work process for upgrade from TrackWise 6.0
 - Work process for conducting system and process group migrations

TrackWise® Training Manager

Prerequisites: Introduction to TrackWise or TrackWise experience /Introduction to Configuration and Administration

Audience: System Administrators, Project Managers, Team Members and IS Support Personnel

Duration: 2 Days

Course Description

The Training Manager course provides students with a strong understanding of the Training Manager solution from an administrator's perspective as well as a detailed explanation of concepts and extensibility of its features. Students learn how to manage curricula, automatically schedule training records, integrate training tracking with dashboards and escalate overdue records. In addition, students learn how to integrate Training Manager with CAPA and Change Control workflows to automatically create new training records based on these processes.

Course Topics

- Training Manager concepts and terminology
- Training Manager: Core configuration
 - Field configuration
 - Group categories
 - Employee and training record project design
 - Workflows (employee and training records)
 - Training template configuration
 - Configuration of training requirements and schedules
 - Configuration of training curricula and curricula mapping
 - Training Manager integration with change control
 - Using dashboards with Training Manager
- Crystal Reports® design for training records
- Advanced Topics
 - Coordinator configuration for Training Manager
 - Employee records and training template import configuration

TrackWise® Audit Execution Package

Prerequisites: Introduction to TrackWise or TrackWise experience/Introduction to Configuration and Administration

Audience: System Administrators, Project Managers, Team Members and IS Support Personnel

Duration: 1 Day

Course Description

The TrackWise Audit Execution Package course provides instruction on the configuration of the Audit Manager and offline audit components of the audit solution. It also provides practical examples of each feature in addition to the benefits and use of the feature. Upon course completion, students will be able to configure the two components of the Audit Execution Package within TrackWise.

Course Topics

- Audit process
- Preliminary planning
- Audit Execution Package terminology
- Installation of Audit Execution Package
- Integration with existing process
- Configuration of Audit Manager and offline audit forms
- Audit distribution
- Import/export of audit records
- Find audit
- Audit history
- Crystal Reporting and Audit Execution Package
- Best practices
- Troubleshooting

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