Sparta Academy Course Catalog

Sparta Systems

Sparta Academy

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

Courses are held either at Sparta Systems' corporate headquarters in New Jersey, London 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. Each course provides hands-on experience in a classroom setting. Training manuals are provided for each session.

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.

_____

Courses include:

- Introduction to TrackWise
- Technical Fundamentals of TrackWise
- Introduction to TrackWise Configuration and Administration
- Intermediate TrackWise Configuration and Administration
- Advanced TrackWise Configuration and Administration
- Crystal Reports Design for TrackWise
- Advanced Crystal Reports Design for TrackWise
- TrackWise QualityView for Report Developers
- TrackWise QualityView for Consumers
- Upgrading to TrackWise 8.7

Courses include (continued):

- Training Manager
- Audit Execution Package
- Fundamentals of TrackWise Web Services
- TrackWise Digital Platform Management Administration
- TrackWise Digital Complaints Management Administration
- TrackWise Digital Quality Management Administration
- TrackWise Digital Complaints – End User
- TrackWise Digital EQMS – End User
- TrackWise Digital Document Management
- TrackWise Digital Training Management

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/sparta-academy

You may also contact Training at 609-807-5379 (United States) and +44 7801496487 (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 components, including discussions around Admin Configuration Tools and Integration Manager. This course also includes hands-on exploration of TrackWise, explaining system functionality and capabilities. Students walk away a comprehensive understanding of how to use TrackWise from the end user perspective.

_____

Course Topics/Outline

Overview, benefits and usage of TrackWise tools, specifically:

- TrackWise user interface navigation
- TrackWise terminology & concepts, e.g., workflow, states, activities, and locking
- Record opening
- Record progression through perform only and schedulable activities
- Reviewing family tree of records
- Data entry and updates
- Identifying next steps in a record's workflow

- Managing user settings
- Relating records through the use of reference records
- Review of a record's history via audit trails
- Creation of scopes and queries to locate records
- Integrated reporting using Crystal Reports and TrackWise Analytics
- Creation and utilization of Dashboard views for more effective task management

Introduction to TrackWise Supplemental Semi-Custom Event

Prerequisites: Introduction to TrackWise, Student and Instructor access to company's configured training environment

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

Duration: 1 Day

_____

Course Description

This semi-custom course supplements the Introduction to TrackWise two-day course and explores TrackWise in the students' own environment. Available in a group setting, students will delve into their company's workflows, configuration forms and TrackWise environment to become familiar with what has been configured for their projects. Students will also perform numerous hands on exercises that involve identifying what the system administrator has made available to them in addition to exercises that coach them to think about what they will need once they start their work in TrackWise. Once students identify their individual needs with the assistance of the instructor, they will then create those items in the training environment. This course focuses heavily on the use of Scopes and Queries to locate records, reports, Dashboards and workflow and configuration form review. It is required that the students and instructor have access to the company's training environment for this semi-custom event. The course includes creation of course materials as well as delivery.

_____

Course Topics/Outline

- Workflow review
- Configuration/Project form review
- Public scope availability and contents
- Creation of personal scopes
- Public query availability and contents
- Creation of personal queries
- User permissions related to records
- Parent child relationship review
- Single record reports

- Multi record reports
- Report Export templates and ad hoc reports to create one off reports
- Review of public dashboards
- Creation of personal dashboards
- Discussion of team needs related to scopes, queries, reports and dashboards to prepare users to return to the workplace to support their teams

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

- TrackWise architecture overview
- Database and Windows setup
    - Creating databases and schemas
    - TrackWise installation
    - TrackWise Utilities installation
    - Web application and underlying software installation
- TrackWise configuration migrator overview terminology and installation
- Locking down configuration using the snapshot

- Making configuration changes, migrating and verification
- Understanding what is and is not migrated
- Adding an additional environment to the migration path
- Migration best practices and troubleshooting
- Tables included in migration
- TrackWise Coordinator service setup and testing
- Troubleshooting/logs

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

- Creation of process groups to facilitate project migration
- Introduce division and project concept
- Create a project using a 14-step methodology
- Creating a workflow
- Create data fields 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: 5 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 gathering business requirements
- Identify steps to define workflow design specifications
- Introduction data field types, including grids
- 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
- Configure TrackWise Coordinator to:
    - Administer triggers
    - Issue notifications
    - Check recurring activities
    - Generate child records and using a decision matrix
    - Use of hidden fields with counters

- Determine when (or if) records should be updated
- Auto-assign records
- Generate auto reports
- Auto-export record data
- Close family records by utilizing stackable admin triggers and events
- Auto alerting project members with the use of counters (Min/Max)
- Progress records based on Reference Records with use of Dynamic Queries
- Program sequence and recurring activities – Scheduling activities
- Copy child values back up to the Parent using a bottom up approach

Advanced TrackWise Configuration and Administration

Prerequisites: Introduction to TrackWise Configuration and Administration, Intermediate TrackWise Configuration and Administration

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
- Use of external fields
- Best practices with reference record fields
- Using hidden fields and virtual group categories
- Use of question fields
- Use of Coordinator for:

    - Auto trending
    - Auto alerts
    - Decision trees
    - Hidden fields
    - Auto numbering
    - Copying data from one field to another

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

- Reporting overview
- Integration with TrackWise Web and database connectivity
- Linking tables using joins
- Adding tables to a report
- Designing multi record reports
- Grouping and sorting data within reports
- Utilizing running totals within a report
- Utilizing parameters to control report content
- Utilizing formulas to manipulate, control and calculate data
    - Date and time conversion
    - Swapping two columns of data
    - Calculate number of days open
    - Conditional display of data
    - Use of break groups to separate data
    - Management of null data result display
- Utilizing headers and footers (including headers and footers for GxP compliance)

- Development of charts and graphs
- Utilizing cross tabs for matrix development
- Utilizing the Select Expert tool to further refine data set results
- Creating single record reports
- Creating of sub-reports
- Developing an activity history report for audit trail review on a record
- Reporting on a family of records using parent-child reports
- Converting reports from one database to another
- Creating auto reports for scheduled distribution
- Troubleshooting reports
- Discuss the impact of configuration changes on reports via Views
- Discuss report validation

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

- Definition and utilization of external fields
- Utilization of direct table linking related to multi-field user defined fields
    - Grid fields
    - Reference records
- Understanding single and multi-record reports filtering mechanism
- Advanced formulas and functions, including:
    - Built in functions
    - Summary functions
    - If-Then-Else logic
    - Shortcuts
    - Creating custom functions
- Evaluation time of formulas (understanding record processing before reading, while reading, while printing)
- 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
- 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 QualityView for Report Developers

Audience: TrackWise Analytics Report Publishers and Authors

Duration: 4 Days

_____

Course Description

This TrackWise Analytics course is designed for the student to gain familiarity with the tools available in TrackWise Analytics to develop useful reports quickly and efficiently. There will be hands on development of simple to advanced reports and the opportunity to explore some commonly used calculations and computes. Various display and formatting options will be explored as well as discussion on the benefits of planning prior to development. The bulk of the course will focus on developing which demonstrate the ease and flexibility of TrackWise Analytics as well as show the developer advanced methods for creating reports using joins.

_____

Course Topics/Outline

- Overview of report authoring levels
- Overview of reports and charts
- Review of available report outputs
- Review of report tree and folder structure
- Thorough review of the developer's design screen, including toolbar menu items such as formatting, slicers, layouts and page breaks
- Adding and removing report fields
- Summing columns and rows
- Grouping data
- Filtering data with simple and advanced filter options
- Creating and editing report headers and footers
- Data visualization (traffic light conditions and font stylization)
- Applying pre-formatted style sheets
- Creating virtual fields to calculate or concatenate data
- Shortcuts for data fields, work area, query area and short names
- Creating a report from a template
- Creating a report from scratch
- Creating a metric report
- Creating a chart
- Using report joins to combine two reports for a drill down report

TrackWise QualityView for Report Developers (cont'd)

- Creating pareto reports

- Creating cycle time reports

- Execute various report design challenges to reinforce student comprehension

- Understanding how to set up and use Reportable Classes

- Defining who can run, edit, develop, share and publish reports utilizing User Permissions

- Advanced Reporting Business Scenarios:

    - Creation of Simple Comparison reporting – Charting of records for variances between the same quarter of consecutive years and comparing Open and Closed records in the dame timeframe.

    - Report Joins – Combining data from separate files into one chart or report; allowing for reporting on shared parameters such as a family hierarchy or a common attribute such as date, site or type

    - Use one reportable class for Multi-level reporting– showing family records and data fields from different record types without the use of sub-reports or joins

    - Building a KPI (Key performance Indicator) Document – combing several charts and report into one document that is run with a single click; exploring drill down functionality

    - Using Defines – changing field formats and record level calculations

    - Practice with Computes – perform calculations based on a group of records

    - Formatting features – making a chart pop, highlighting data in reports and improving the overall presentation of reports

    - Function Examples – using Defines for formatting of string and dates as well as more complex calculations

    - Combined functionality to create: Calendar Style Report, Compounding Traffic Light Conditions Report, Multi-Level Drill Down Report, and Rolling Trend Dashboard Report.

TrackWise QualityView for Consumers

Audience: TrackWise Analytics Consumers

Duration: 4 Hours

_____

Course Description

This TrackWise Analytics Consumer course is designed to show the new Consumer Analytics user how to work with useful reports in the TrackWise environment. This course provides information on the types of reports and associated report options available to consumer users. Basic report output types and features such as report, charts, drill down reports, prompts and much more are reviewed. Additionally, the handling of data within a report for users without report design rights is included.

_____

Course Topics/Outline

- Introduction to Analytics
- Review of report tree and folder structure
- Generating and closing reports
- Review of report types:
    - Reports and Charts
    - Reports with Prompts
    - Drill Down Reports
    - Dashboard/Document Reports
- Handling of the various output formats:
    - HTML
    - Excel
    - PDF
    - PowerPoint
    - Active Reports
    - Info Mini Report

Upgrading to TrackWise 8.7

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 8.7 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 previous versions (either 7 or 8 line) to 8.7 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 8.7 environment.

_____

Course Topics

- TrackWise 8.7 overview
- Technology overview
    - Tomcat
    - .NET framework
- Review of system requirements
    - TrackWise architecture
    - System requirements as of 8.7
- Discussion and review of next generation configuration management
    - Introduction to process groups
    - Review of historical vs. current day migration process
- Conducts hands on exercises to perform the upgrades
- Review of process group taxonomy best practices
- Review of new Web Admin and TrackWise features by TrackWise version
- TrackWise Analytics overview

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

- An introduction to Training Manager concepts and terminology

- Training Manager: Core configuration review:

    - 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

- Crystal Reports design for training records

- Advanced Topics

    - Coordinator configuration for Training Manager

    - Employee records and training template import configuration

    - Review of Dashboards relative to Training Manager

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

- Review of the audit process
- Preliminary planning
- Audit Execution Package terminology
- Integration with existing process
- Configuration of Audit Manager and offline audit forms
- Configuration of audit distribution
- Distributing audits
- Finding audit
- Using TrackWise Offline to export/import audit records
- Reviewing audit history
- Crystal Report references for Audit Execution Package
- Best practices
- Troubleshooting

Fundamentals of TrackWise Web Services

Prerequisites: Introduction to TrackWise or TrackWise experience/Introduction to Configuration and Administration, Proficiency in Java, Comfortable working in a Java IDE, Familiar with XML

Audience: Developers

Duration: 3 Days

_____

Course Description

The Fundamentals of TrackWise Web Services course introduces the capabilities and application of TrackWise Web Services through the use of real-life business scenarios where web services are typically implemented. Students will learn the following: background information in order to understand the business need for web services; the technologies that are typically used at a high level; how to set up and work in a development environment; and how to set up and program Inbound and Outbound web services through iterative examples that demonstrate the capabilities of the solution. Exercises throughout the course are taken from the most commonly seen web service integrations and provide a solid foundation for future web services development.

_____

Course Topics/Outline

- Business Case for Web Services
- Installation and Environment Setup
    - Eclipse Installation and Setup
    - IWS and OWS Setup
    - Debugging
- Web Services Best Practices and Conventions
    - Code Conventions and Logging
    - Connection / Session handling
    - TrackWise Configuration
    - Parameter Files
- Inbound Web Services
    - Connection Logic

- Working with Data Types
- Querying, Updating and Creating Records
- Posting Activities
- Outbound Web Services
    - Building the Interface Contract
    - Axis2 and AXIOM
    - Search and Populate Operations
    - Working with Grids
- Putting it all Together
    - Coupling IWS and OWS
- Repeatable Process for Development
- Troubleshooting

TrackWise Digital Platform Management Administration

Prerequisites: Beginner/Intermediate Salesforce.com Administrator training and/or experience

Audience: System administrators, system integrators and others responsible for configuring, managing and maintaining a TrackWise Digital implementation.

Duration: 2 Days

_____

Course Description

This hands-on course is a must for those new to the TrackWise Digital Platform and TrackWise Digital applications. This instructor led course is an end-to-end exercise in configuring, implementing, and managing the TrackWise Digital Part 11 Platform. Participants will learn how to use the declarative "clicks not code" capabilities of the Part 11 Platform to create workflows, setup fully compliant audit trail, and apply electronic signature capabilities.

_____

Course Topics/Outline

- TrackWise Digital Architecture and Application Suite
- Overview of Platform objects
- Application Set up
    - Permission Sets
    - Configuring Platform Custom Settings
    - Configuring Remote Site Settings
    - Configuring Remote Access
    - E-signature Setup
- Platform Workflow Fundamentals
    - Creating Status, Actions
    - Creating Workflow Rules and Steps
    - Viewing Workflows
    - Multiple and Parallel Workflows
- TrackWise Digital Audit Trail

    - Base Fields
    - Child Relationships
    - Parent Relationships
- General SFDC Configuration
- Automation:
    - TrackWise Digital Tasks/ Jobs
    - Process Builder
- Meaningful Data Change
- TrackWise Digital Task Dashboard
- Utilities
    - Query Explorer
    - Configuration Deployment
    - Test Class Generation
    - Report Template Builder

TrackWise Digital Complaint Management Administration

Prerequisites: TrackWise Digital Platform Installation and Configuration Training

Audience: System administrators, system integrators and others responsible for configuring, managing and maintaining TrackWise Digital Complaints Management application.

Duration: 1 Day

_____

Course Description

This hands-on course is a must for those new to the TrackWise Digital Complaint Management application. This instructor led course is an end-to-end exercise in configuring, implementing, and managing the TrackWise Digital Complaint Management application. Participants will be introduced to Assessments, Investigations, and supported Safety and Regulatory Reporting forms using the declarative "clicks not code" capabilities of the Part 11 Platform and Complaints Management applications.

_____

Course Topics/Outline

- Complaint Management Overview and Customization
    - User Setup/Permission Sets
    - Permission Group Assignment
- Data Collection: Customer, Product, and Complaint Codes
- Configuring Assessment Admin
- Configuring Investigation Admin
- Process review and end to end walkthrough: Create, Edit and Workflow
    - Inquiry
    - Complaint
- Additional App Customization
- Regulatory and Safety
    - EMDR Setup and Configuration
    - MEDDEV Setup and Configuration
    - EMDR process review with electronic submission
    - MEDDEV Form and Functionality
    - Canadian and Australian Report Forms
    - Health Hazard Evaluation Form

TrackWise Digital Enterprise Quality Management Administration

Prerequisites: TrackWise Digital Platform Course

Audience: New TrackWise Digital Enterprise Quality Management System Administrators.

Duration: 1 Day

_____

Course Description

This hands-on course for those new to the TrackWise Digital EQMS Management application. This instructor-led course is an end-to-end exercise in understanding how to configure the TrackWise Digital EQMS Management component of the TrackWise Digital suite of applications. Participants will learn how to use the declarative "clicks not code" capabilities of Enterprise Quality Management. The course curriculum provides an explanation of the EQMS objects, application management and configuration, including hands on exploration of functionality.

_____

Course Topics/Outline

- TrackWise Digital Concepts
- EQMS Overview and Customization
  - EQMS Object Relationships
  - User Setup/Permission Sets
  - Permission Group Assignment
  - Data Collection
  - Audit Trail
  - Assessment Admin
- Process review and end to end walk through: create, edit, and workflow
  - Quality Event
  - CAPA
  - Audit
  - Change Control
  - Extension Requests
- Additional application customization

TrackWise Digital Complaint Management - End User

Prerequisites: None

Audience: New TrackWise Digital Complaint Management End Users.

Duration: 0.5 Day

_____

Course Description

This comprehensive hands-on course is a must for those new to the TrackWise Digital Complaint Management application. This instructor-led course is a hands-on end-user walk-through in understanding how to use the processes in the TrackWise Digital Complaint Management application. Students will learn how to apply processes such as Inquiry, Complaints, Assessments, and Investigation/Evaluations. Participants will learn how to create new records, edit existing records, navigate through process workflows, see validation rules in action and more.

_____

Course Topics/Outline

- Complaints Fundamentals
- Process review and end to end walk through: create, edit, and workflow
  - Inquiry
  - Complaints
  - Assessments
  - Investigation/Evaluation
- Safety and Regulatory Review
- Views, Queues, Dashboards and Reporting
- Audit Trail and Workflow History
- Working with Meaningful Data Change Tickets and Dashboards
- TrackWise Digital Task Dashboard overview

TrackWise Digital Quality Management System – End User

Prerequisites: None

Audience: New TrackWise Digital Enterprise Quality Management System Administrators and End Users.

Duration: 1 Day

_____

Course Description

This hands-on course is for those new to the TrackWise Digital EQMS Management application. This instructor-led course is a hands-on end-user walk-through in understanding how to use the various quality processes in the TrackWise Digital EQMS Management application. Students will learn how to apply processes such as Quality Events, CAPAs, Change Controls, Audits and more. Participants will learn how to create new records, edit existing records, navigate through process workflows, see validation rules in action and more.

_____

Course Topics/Outline

- EQMS Fundamentals
  - Basic concepts
  - EQMS Objects and Relationships
- Process review and end to end walk through: create, edit, and workflow
  - Quality Event
  - CAPA
  - Change Control
  - Audit
  - Extension Request
- Views, Queues, Dashboards and Reporting
- Audit Trail and Workflow History
- Working with Meaningful Data Change Tickets and Dashboards
- TrackWise Digital Task Dashboard overview

TrackWise Digital Document Management System

Prerequisites: None

Audience: New TrackWise Digital Document Managements System Administrators and End Users.

Duration: 0.5 Day

_____

Course Description

This hands-on course is a for those new to the TrackWise Digital Document Management System(DMS) application. This instructor led course provides an overview of DMS as a document management tool. The course curriculum provides an explanation of the DMS objects, application management and document management, including a hands on exploration of the functionality. Students walk away with a comprehensive understanding of how to use TrackWise Digital DMS application from the end user perspective.

_____

Course Topics/Outline

- DMS Overview
- DMS User Setup
    - DMS Roles
    - DMS Permission Sets
- DMS Application Management
    - Assign Permission Sets
    - Reconcile Users
    - Custom Setting
    - Document Types and Departments
    - Document Number Format Setting
    - Flex Field Configuration
    - Audit Trail
- DMS Dashboard

- Document Management
    - Document Management Workflow
    - Create Corporate Documents
    - Review Corporate Documents
    - Approve Corporate Documents
    - Revise Corporate Documents
    - Obsolete Corporate Documents
- View and Print Documents
- Controlled Printing
- Audit Reports
- TMS Integration Overview

TrackWise Digital Training Management System

Prerequisites: None

Audience: New TrackWise Digital Training Management System (TMS) Administrators

Duration: 0.5 Day

_____

Course Description

This hands-on course is for those new to the TrackWise Digital Training Management System(TMS) application. This instructor led course provides students with a strong understanding of the TMS solution from a TMS administrator and TMS User perspective. Students will learn how to manage library items, training plans, assign and complete training, and understand TMS Dashboard. Additionally, students will learn how to manage training related to the application integration of TrackWise Digital Training Management System and TrackWise Digital Document Management System.

_____

Course Topics/Outline

- TMS Overview
- TMS User Setup
- TMS Application Management
    - Assign Permission Sets
    - Custom Setting
- TMS Administration
    - Create Training Plans
    - Manage Library Items
    - Training Plan Management
    - Assign Training Plans to users
- Complete Training Assignments
    - Documents
    - Courses
- Assign Retraining
- Revise Library Items
- Obsolete Library Items
- Notifications
- TMS Dashboard
- TMS Reports