



Sparta Academy Course Catalog



Sparta Systems

Sparta Academy



Sparta Systems is proud to present you with an education program that will empower your software installation team members, administrators 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 available as Instructor-led eLearning or eLearning. Instructor-led eLearning enables access to the class right from your desktop. Each student is provided with a training manual and a lab environment to use during the course sessions for hands-on experience. With eLearning courses, students complete the course on their own through interactive simulations that can be viewed and with the opportunity to try.

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

Courses include:

Course descriptions and outlines are detailed on the following pages. Click the Course Title to go directly to the details.

TrackWise	
Course Title	Days
Introduction to TrackWise	2
Technical Fundamentals of TrackWise	2
Introduction to TrackWise Configuration and Administration	5
Intermediate TrackWise Configuration and Administration	5
Crystal Reports Design for TrackWise	4
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TrackWise Digital	
Course Title	Days
TrackWise Digital Platform Management Administration	2
TrackWise Digital Complaints Management Administration	1
TrackWise Digital Quality Management Administration	1
TrackWise Digital Supplier Quality Management Administration	1
TrackWise Digital Product Registration Tracking Administration	1
Course Title	Access
TrackWise Digital Document Management	1-week
TrackWise Digital Training Management	1-week

For further information and to obtain course schedules and locations visit us at: <http://www.spartasystems.com/training>

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 9.0 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 concepts and terminology, e.g., workflow, states, activities, and locking
- Desktop review
- Creating new records
- Data entry and updates
- Record progression through perform only and schedulable activities
- Reviewing family tree of records
- Identifying next steps in a record's workflow
- Relating records using reference record functionality
- Review of Activity History
- Creating scopes, queries and views to locate records
- Reports and Exports
 - Single Record / Multi Record
 - Print Friendly (HTML)/ Spreadsheet / PDF
- Creation and utilization of Dashboard views for more effective task management
- TrackWise QualityView review

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

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

TrackWise® QualityView for Report Developers

Audience: TrackWise QualityView Report Publishers and Authors

Duration: 4 Days

Course Description

This TrackWise QualityView course is designed for the student to gain familiarity with the tools available in TrackWise QualityView 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 will demonstrate the flexibility of TrackWise QualityView as well as show the report developer a variety of methods for creating reports. In addition to reports, designing portals is cover as well QualityView administrator tasks such as creating schedules, distributing reports, alert reporting and change management (Import/Export reports) to name a few.

Course Topics/Outline

- Overview of QualityView permission levels
- Overview of reports and charts
- Review of available report outputs
- Thorough review of the developer's design screen and available features
- Report exercises:
 - Create a report from a template
 - Create a report from scratch
 - Create a metric report
 - Create a chart
- Filtering data and prompts
- Create virtual fields (data defines), formula workshop and computes
- Report exercises:
 - Join charts with drill down
 - Use hold files to Join reports
 - Create a document
 - Create a pareto
 - Create a cycle time report
 - Create a visualization (interactive document/dashboard)

TrackWise® QualityView for Report Developers (cont'd)

- Portal design overview
- Report exercises:
 - Create a collaborative portal
 - Create a portal from a template
 - Compare quarter by year
 - Create a 3-level report
 - Multiple level drill down report
 - Animated overdue report
 - Report with auto links
- Publishing/Sharing
- Administration
 - ETL service
 - QualityView reportable classes
 - User permissions
 - Session timeout
- Report Caster
 - Scheduling reports
 - Create and manage distribution lists
 - Alert reporting
- Change Management
 - Export reports
 - Import reports

TrackWise Digital Platform Management Administration

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

Audience: System administrators or those 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 eLearning course is an end-to-end exercise in configuring, implementing, and managing the TrackWise Digital Part 11 Platform. The course is the foundation needed for all the applications in the TrackWise Digital suite. Participants will learn how to use the declarative “clicks not code” capabilities of the Part 11 Platform to understand application setup, create workflows, setup fully compliant audit trail, apply electronic signature capabilities, process automation and more.

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
 - E-signature Setup
 - Allow Search for Required Objects
- Platform Workflow Fundamentals
 - Creating Status, Actions
 - Creating Workflow Rules and Steps
 - Add a Permission Group to a Workflow Step
 - Setup and View Workflow Panel
 - Workflow History
 - Multiple and Parallel Workflows
 - Workflow Rule Features
- TrackWise Digital Record Detail Component
- TrackWise Digital Audit Trail
- General Salesforce Configuration
- Multiple Record Link
- Record Access Rules
- Automation:
 - 123 Tasks/ 123 Jobs
 - Process Builder
- TrackWise Digital Custom Objects
- Meaningful Data Change
- 123 Task Dashboard
- Utilities
 - Configuration Deployment
 - Test Class Generation
 - Report Template Builder
 - Record Admin

TrackWise Digital Complaints Management Administration

Prerequisites: TrackWise Digital Platform Installation and Configuration Training

Audience: System administrators or those 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 eLearning course is an end-to-end exercise in configuring, managing and maintaining the TrackWise Digital Complaint Management application. Participants will be introduced to the capabilities of TrackWise Digital Complaints, covering configuration, process walkthrough and supported Safety and Regulatory Reporting.

Course Topics/Outline

- Complaints Management Overview and Configuration
 - User Setup/Permission Sets
 - Permission Group Assignment
 - Data Collection and Data Field Values
- Configuring Assessment Admin
- Process review and end to end walkthrough: Create, Edit and Workflow
 - Inquiry
 - Complaint
 - Extension Request
- Additional App Configuration
- Regulatory and Safety Overview and Configuration
 - EMDR Setup and Configuration
 - EMDR Electronic Submission Setup
 - EU MIR Configuration
- Regulatory and Safety process review
 - EMDR, VMSR, MEDDEV, EU MIR, HHE, TGA, CVR

TrackWise Digital Quality Management Administration

Prerequisites: TrackWise Digital Platform Course

Audience: New TrackWise Digital Quality Management System Administrators

Duration: 1 Day

Course Description

This hands-on course is a must for those new to the TrackWise Digital Quality Management System (QMS) application. This Instructor-led eLearning course is an end-to-end exercise in configuring, managing and maintaining the application. Participants will be provided with an explanation of the EQMS objects and introduced to the capabilities TrackWise Digital EQMS, covering configuration and process walkthroughs of Quality Events, CAPA, Audit and Change Control.

Course Topics/Outline

- EQMS Overview and Configuration
 - EQMS Objects and Relationships
 - User Setup/Permission Sets
 - Permission Group Assignment
 - Data Collection and Data Field Values
 - Assessment Admin
- Process review and end to end walk through: create, edit, related records and workflow
 - Quality Event
 - CAPA
 - Audit
 - Change Control
 - Nonconformance
 - Out of Specification (OOS)
 - Extension Requests
- Additional application configuration

TrackWise Digital Supplier Quality Management Administration

Prerequisites: TrackWise Digital Platform Course

Audience: New TrackWise Digital Supplier Quality Management System Administrators

Duration: 1 Day

Course Description

This hands-on course is for those new to TrackWise Digital and the Supplier Quality Management (SQM) application. This instructor-led eLearning course is an end-to-end exercise designed to provide an understanding of the SQM objects such as Vendors, Materials, Audits, SCARS, etc. Participants can expect to gain the knowledge needed for application management and configuration. Additionally, the course introduces the administrator to the objects from a process perspective allowing the participants to explore the functionality of SQM.

Course Topics/Outline

- SQM Overview and Configuration
 - SQM Objects and Relationships
 - User Setup: Profiles and Permission Sets
 - Record Access Rules
 - Public Group/Permission Group Assignment
 - Data Collection and Data Field Values
 - Assessment Admin
- Process review and end to end walk through: create, edit, related records and workflow
 - Vendor / Supplier Sites
 - Audit
 - Audit Findings
 - SCARs
 - Change Requests
 - Extension Requests
- Additional application configuration

TrackWise Digital Product Registration Tracking Administration

Prerequisites: TrackWise Digital Platform Course

Audience: New TrackWise Digital Product Registration Tracking Administrators

Duration: 1 Day

Course Description

This hands-on course is for those new to the TrackWise Digital Product Registration Tracking application and those responsible for configuring, managing, and maintaining the application. This Instructor-led eLearning course is an end-to-end exercise in understanding the capabilities of TrackWise Digital Product Registration Tracking and covers customizations, and process walkthroughs of Product Family, Country Registration, as well as maintaining Dossier Folders.

Course Topics/Outline

- Product Registration Tracking Overview and Configuration
 - User Setup/Permission Sets
 - Public Group/Permission Group Assignment
 - Data Collection
 - Data Field Values
 - Resource Management: Country Flag Images
- Product Registration Objects
- Process Review end-to-end walkthrough: Create, Edit, and Workflow
 - Product Family
 - Product Family
 - Product
 - Country Registration/ Initial Registration
 - Country Registration
 - Registration Product
 - Dossier Folder/ Dossier Document
 - Country Registrations/ Child Registrations
- Dashboards and Reports Review
- Additional App Configuration

TrackWise Digital Document Management System

Prerequisites: None

Audience: New TrackWise Digital Document Management Administrators and End Users

Course Duration: 0.5 Day

Access Duration: 1-week

Course Description

This eLearning OnDemand course is for those new to the TrackWise Digital Document Management System (DMS) application. The course provides an overview of DMS as a document management tool. Providing course lessons that include an explanation of the DMS objects, application management and navigating the document lifecycle. Walk throughs of the process are included using interactive simulations of the functionality where you can view and have the opportunity to try it. Students walk away with a comprehensive understanding of how to use TrackWise Digital DMS application from the DMS administrator and DMS User perspective.

Course Topics/Outline

- DMS Overview
- DMS User Overview
 - DMS Roles
 - DMS Permission Sets
- Login
- DMS Application Setup
 - DMS Setup
 - Create a DMS Admin (System Permissions) Permission Set
 - Assign Permission Sets
 - Reconcile Users
 - Custom Setting/ DMS Application Settings
 - Upload Logo
 - Create Document Types
 - Create Document Departments
 - Document Number Format Setting
 - Cabinet Structure
- Flex Field Configuration
 - Create and Configure Flex Field
- Flexible Permission Criteria
 - Set Permission Criteria
 - Create Public Group
 - Setup Sharing Rules
 - Create DMS Groups
- Additional Application Setup
 - Audit Trail Setup (TrackWise Digital Platform Audit Trail)
 - QMS/DMS Integration
- My DMS
 - My DMS
 - The Cabinet
- Document Lifecycle Management
 - Document Lifecycle Management
 - Document Workflow Review

- Create a Corporate Document
- Prepare the Document Draft
- Submit a Corporate Document for Review
- Review a Corporate Document
- Submit a Corporate Document for Approval
- Approve a Corporate Document
- Promotion of Document from Approved to Effective
- Checkout a Corporate Document for Revision
- Document Management Tasks
 - Document Management Tasks
 - Restoring Files
 - Change Author/Owner of a Document
- Upload Workflow
- Cancel the Workflow of a Document
- Withdraw a Workflow for a Document
- Obsolete a Document
- Delete a Corporate Document
- Controlled Printing
- Controlled Download
- View Audit Report
- View Documents
 - View Documents
- Print Approved, Effective, Obsolete
 - Print Approved, effective, Obsolete Documents
- TMS Integration Overview

TrackWise Digital Training Management System

Prerequisites: None

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

Course Duration: 0.5 Day

Access Duration: 1-Week

Course Description

This eLearning OnDemand course is for those new to the TrackWise Digital Training Management System (TMS) application. This course provides students with an understanding of the TMS solution from a TMS administrator and TMS User perspective using interactive simulations that you can view and have the opportunity to try it.

Students will learn how to manage library items, quizzes, training plans, assign and complete training, and understand the 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 Management
 - TMS User Setup
- TMS Management: Activities and Quizzes Menu
- Create Training Plan
- Manage Library Items
 - Manage Training Level
 - Create a New Document
 - Create a New Course
 - Release Library Items migrated from DMS
- Quizzes
 - Create Questions
 - Create a Quiz Bank
 - Manage Quizzes
 - Attach Quiz to a Library Item
- Training Plan Management and Assignment
 - Training Plan Management
 - Training Plan Assignment
- Dashboard Review
 - My Profile section
 - Team Progress Section (Managers Only)
 - My Team Section (Managers Only)
 - Add Training
 - Update Employees Status
 - Delegates
- Complete Training (User)
 - Complete Document Training
 - Complete Document with Quiz
 - Complete Instructor Led Course Training
- Assign Retraining
- Revise a Library Item
- Obsolete a Library Item
- Notifications
- Reports

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