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Sparta
Academy
Course
Catalog

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 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 |
| TrackWise QualityView for Report Developers | 4 |

| 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 |
| 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

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|---------------|--|
| 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 with 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
- Managing User Settings
- TrackWise Desktop Review
- Creating Records
- Data Fields and ConfigForms
 - Intelligent Forms
- Workflow Proficiency: States and Activities
 - Performed Activities
 - Scheduled Activities
 - Group Approvals
- Activity History (Audit Trail)
- Coordinator Overview
- Creating Custom Scopes, Queries and Views
- Reporting, Exports and Charts
 - Single Record Reports
 - Multi-Record Reports
 - Exports: HTML, Spreadsheet, PDF
- Dashboard
 - Dashboard Components and Navigation
- TrackWise QualityView Overview

Technical Fundamentals of TrackWise

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|----------------------|--|
| 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

Day One

- TrackWise Architecture Overview
- Installation Process Overview
- Database Installation – MS SQL Server
- Pre-Installation
- TrackWise Utilities Installation
- Web Application Installations
- Post Installation

Day Two

- TrackWise Configuration Migrator Overview and Terminology
- Setup of Migrator
- The Snapshot
- Making Configuration Changes, Migrating and Verification
- Add a New Environment to the Migration Path
- Migration Best Practices & Troubleshooting
- Tables Included in Migration
- TrackWise Coordinator Setup
- Integration Manager

Introduction to TrackWise Configuration and Administration

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|-----------------|---|
| 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, use of TrackWise Integration Manager and monitoring tools.

Course Topics/Outline

- Introduction to Configuration and Process Groups
- Divisions and Projects Concept
- Create a Project using a 14-step methodology
- Use Visio to Create the Workflow
- Data Field Design
- Group Category Permissions
- Audit Trail
- Desktop Layout
- States and Activities
- Group Category Workflow
- Projects
 - Define Project and Project Member Access
- Create Configuration Forms
- Test the Configured Project
- Additional Project Settings
- Intelligent Forms
- Configuration Practice Exercises
- Introduction to Coordinator
- Coordinator Exercise
- Administration Tools
- Person and Selection Import

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 detail regarding project design from a strategic, business-specific perspective. This 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

- Design a Work Plan, gather Requirements
- Best Practices and Concerns when Building a Project
- Additional Data Field Types, including Grids
- Project Workflow and Group Categories
 - Schedulable Activities
 - Perform Only Activities
 - Parallel Approvals
- Additional Project Settings, such as
 - Notifications
 - Lock Fields
 - Conditionally Required Fields
 - Person Filters
- Virtual Group Categories
- Project Verification
- Administrative Tools
- Coordinator Configuration
 - Automatically Create Child Records
 - Auto Assign Records
 - Past Due Notifications
- AutoReport
- AutoExport
- Configuration and Coordinator Exercise
- Coordinator Configuration Workshop

Crystal Reports Design for TrackWise

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|----------------------|---|
| Prerequisites | 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. The report designer goes through a range of topics and challenging scenarios. In addition, the course focuses on the creation of professional looking reports. The student gains an understanding of table linking and can identify which TrackWise tables contain each specific piece of information.

Course Topics/Outline

- Reporting Overview
- Database Connectivity
- Table Linking
- Multi-Record Report Design
- Grouping and Sorting
- Running Totals
- Parameters and Formulas
- Charts & Graphs
- Cross-Tabs
- Multi-Record Report Review
- Single Record Report
- Subreports
- Activity History Report
- Parent-Child Report
- Single Record Report Review
- Converting Reports
- Coordinator Auto Reports
- Troubleshooting Reports
- Creating Views with Web Administrator
- Report Validation and Explanation

TrackWise QualityView for Report Developers

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|---------------|---|
| Prerequisites | Introduction to TrackWise |
| 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 covered 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

- QualityView Permission Levels
- Overview of Reports and Charts
- Developer's Design Screen and 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
- 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)
- Portal Design Overview

TrackWise QualityView for Report Developers continued on the next page.

TrackWise QualityView for Report Developers (cont'd)

- 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 autolinks
- 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 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 Platform Application 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, Application Suite and Platform Objects Overview
- Application Setup
 - Permission Sets
 - Custom Settings and Remote Site Settings
 - E-Signature Setup
- Platform Workflow Fundamentals
 - Workflow Status, Actions
 - Workflow Rules, Workflow Step and Permission Groups
 - Workflow Panel Setup
 - Workflow History
 - Multiple and Parallel Workflows
 - Workflow Rule Features
- TrackWise Digital Record Detail Component (TWD RDC)
 - Configure TWD RDC
 - Enhance Lookup Search
 - Multi-User Notification
 - Intelligent Forms
- TrackWise Digital Audit Trail
- General Salesforce Configuration
- Multiple Record Link
- Record Access Rules
- Automation
 - 123 Tasks/ 123 Jobs
 - Flow
 - Attribute System Generated Events to Automated Process
- TrackWise Digital Custom Objects
- Meaningful Data Change
- 123 Task Dashboard
- Utilities
 - Configuration Deployment
 - Report Template Builder
 - Record Admin
 - Test Class Generation

TrackWise Digital Complaints Management Administration

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|----------------------|--|
| Prerequisites | TrackWise Digital Platform Management Administration |
| Audience | System administrators or those responsible for configuring, managing, and maintaining the 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
 - Complaints Objects and Relationships
 - User Setup/Permission Sets
 - Permission Group Assignment
 - Data Collection and Data Field Values
- Configure Assessment Admin
- Process review and end to end walkthrough: Create, Edit, Related Records and Workflow
 - Inquiry
 - Complaint Family
 - Extension Request
- Additional App Configuration
- Regulatory and Safety Overview and Configuration
 - EMDR Configuration and Setup
 - EMDR Electronic Signature Setup
 - EU MIR Configuration
- Regulatory and Safety Process Overview
 - EMDR, VMSR
 - EU MIR, MEDDEV
 - HHE, TGS, CVR

TrackWise Digital Quality Management Administration

| | |
|----------------------|---|
| Prerequisites | TrackWise Digital Platform Management Administration |
| Audience | System administrators or those responsible for configuring, managing, and maintaining the TrackWise Digital Quality Management application. |
| 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 walkthrough: Create, Edit, Related Records and Workflow
 - Quality Event Family
 - CAPA Family
 - Audit Family
 - Change Control Family
 - Nonconformance Family
 - Out of Specification (OOS) Family
 - Batches
 - Extension Requests
- Additional Application Configuration

TrackWise Digital Supplier Quality Management Administration

| | |
|----------------------|--|
| Prerequisites | TrackWise Digital Platform Management Administration |
| Audience | System administrators or those responsible for configuring, managing, and maintaining the TrackWise Digital Supplier Quality Management application. |
| 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 course is an end-to-end exercise in understanding the capabilities of SQM as well as the Supplier Collaboration features of Record Access Rules and Supplier Portal. The course covers configuration and process walkthroughs of the SQM objects such as Vendors, Materials, Audits, SCARS, etc. both as the SQM Internal User and Supplier User. Participants can expect to gain the knowledge needed to configure, manage, and maintain the TrackWise Digital SQM and TrackWise Digital Supplier Portal applications. Additionally, the course introduces administrators 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 Walkthrough: Create, Edit, Related Records and Workflow
 - Vendor, Supplier Site, SCAR, Change Request
 - Audit Family
 - Extension Request
- Additional App Configuration
- Supplier Portal Overview and Configuration
- Supplier Portal / Configure for the Supplier User
- Supplier Portal Collaboration
 - Enable Supplier Portal Access
 - Share / Unshare Records (Overview)
 - Manage Supplier Users (Overview)

TrackWise Digital Document Management System

| | |
|------------------------|--|
| Audience | 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
- DMS Application Setup
 - DMS Setup
 - DMS Admin (System Permissions) Permission Set
 - Assign Permission Sets and Reconcile Users
 - Custom Setting/ DMS Application Settings
 - Logo Upload
 - Document Types
 - Document Departments
 - Document Number Format Setting
 - Cabinet Structure
- Flex Field Configuration
- Flexible Permissions
- Additional Application Setup
 - Audit Trail Setup (TrackWise Digital Platform Audit Trail)
 - QMS/DMS Integration
- My DMS
- Document Lifecycle Management
 - Create, Submit, Review and Approve
 - Checkout for Revision
- Document Management Tasks
 - Restore Files
 - Change Author/Owner
 - Upload Workflow
 - Cancel, Withdraw Workflow
 - Obsolete
 - Controlled Printing, Controlled Download
 - View Audit Report
- View Documents
- Print Approved, Effective, Obsolete
- TMS Integration Overview

TrackWise Digital Training Management System

| | |
|------------------------|--|
| Audience | TrackWise Digital Training 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 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 Management: Activities and Quizzes
- 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
- Dashboard Review
 - My Profile Section
 - Team Progress Section (Managers Only)
 - My Team Section (Managers Only)
 - Add Training
 - Update Employee Status
 - Delegates
- Complete Training (Users)
 - 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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