



**Goal:** To provide CompliantPro Administrators all the tools necessary to successfully configure the system.

**Pre-Requisite:** Attendees must have had basic Administrator Training prior to attending the CompliantPro Administration Boot Camp.

## Day One:

### Introduction and Agenda Review

1. General Configuration Settings
2. High level Configuration
3. List of Modules
4. Organizations
5. Roles and Allowances
6. Profiles/Backups
7. Access and Security

### Conceptual Workflow Review

1. What are the three major workflows?
2. Where are they used?
3. Where do they touch and depend on each other?

### Document Classes, Layouts, and Document Types

1. What are they?
2. Workflow
3. Roles
4. Categorization (DEGs)
5. All Organizations vs. Organizations Specific (Pros & Cons)
6. Timelines and Escalation
7. Numbering Options

### Layouts and Browser Editor Features

1. Creation and edit commands
2. Inserting graphics and using clip art function
3. Attachments
4. Template features:
  - Predefined text and tables
  - User defined fields
  - Layout level attachments

### Master Data Introduction

1. What is it?
2. How can we use it?
3. Where can we use it?
  - Supplier
  - Customer
  - Equipment
  - Product

### Day Two:

#### Request and Response Workflow

1. What is it?
2. How is it used?
3. Where is it used?

#### Request and Response Details

1. Document Type Settings
2. Named workflow Details
3. Master Search
4. Searched and Reports
5. Use with Template Layouts

#### Request and Response Workflow

1. NCMR
2. CARs/PARs
3. Engineering Change
4. Waivers
5. Assessments

### Day Three:

#### Advanced Layout Configuration

1. Read restriction
2. Pre-staged content
3. Checklists
4. Creating fields in forms

#### Advanced Layout Configuration

1. Create checklists
2. Develop checklist sections into forms
3. Review and Approval

#### Profiles and Special Actions

1. The mechanics & values of special actions
2. Profiles: What are they?
3. Special Actions: What are they?
4. How to set them up
5. Rolling up data and status from special actions into profiles
6. Scoring checklists

### Day Four:

#### Advanced Configuration Settings

1. User Interface Settings
2. Hiding Components
3. Changing E-mails
4. Changing Buttons
5. Administrative Utilities

### Day Five:

#### Training and Qualification

1. Setting up a fully functioning Training and Qualification system