



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 Certification 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. Organization 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:
 - a. Predefined text and tables
 - b. User defined fields
 - c. Layout level attachments

Master Data Introduction:

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



Day Two:

Request and Response:

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. Searches 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

Check List and Form Layout:

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