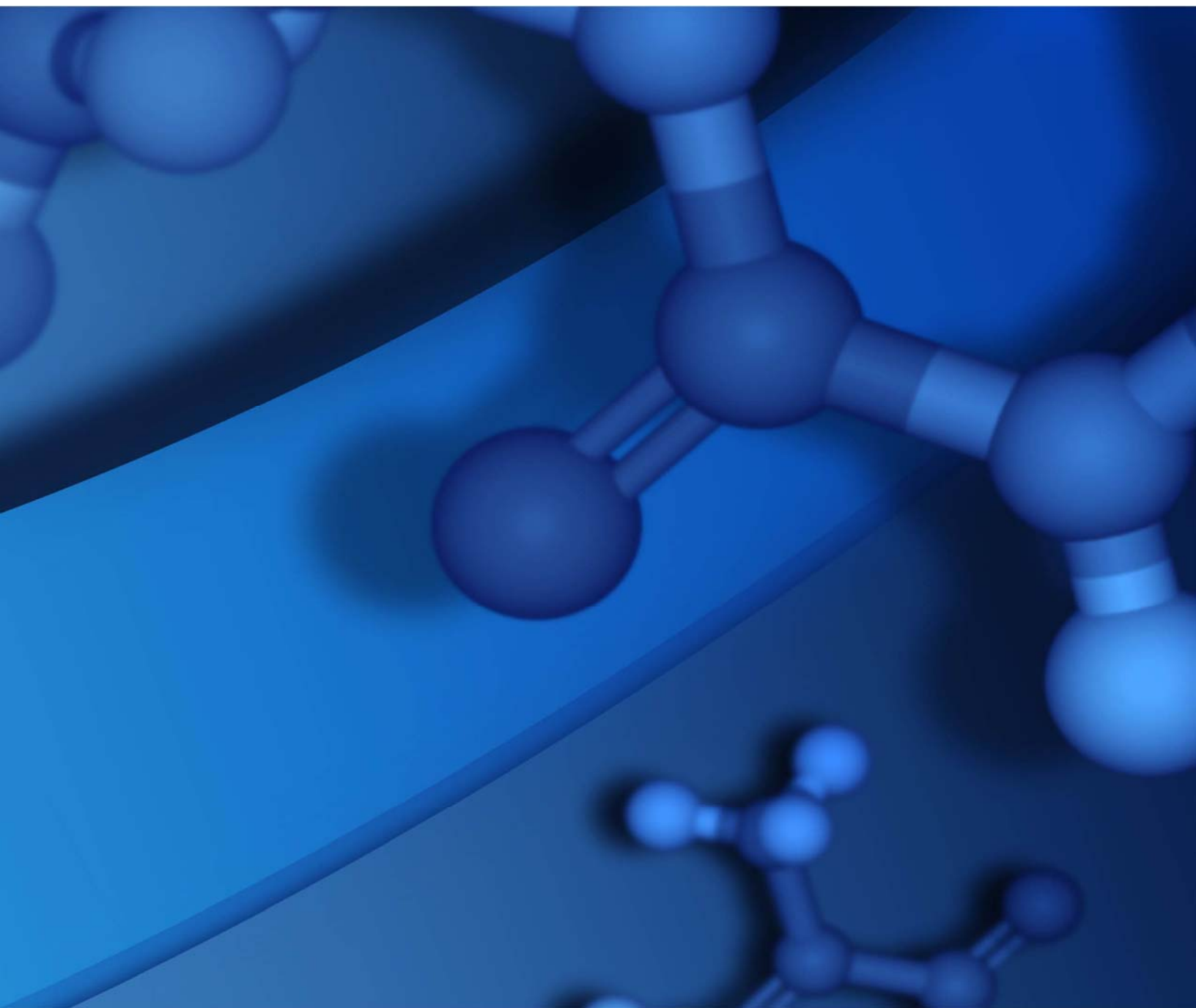


# TRAINING COURSE CATALOG

QUMAS



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# SUMMARY

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We are pleased to offer a variety of courses to help you reach productivity quickly and increase the value of your investment in BIOVIA software. A range of training options and delivery methods is available so you can choose a format that best meets your needs. We use structured training materials developed by certified instructional designers and include extensive examples and exercises to maximize practical skills that you can put to use immediately.

## Delivery Methods:

- **eLearning Videos:** These self-paced, micro-learning videos introduce you to BIOVIA QUMAS and are available at any time from a web browser. They are also a useful tool when you want a quick reminder of QUMAS functionality.
- **Instructor-Led Training:** Facilitated by a BIOVIA certified instructor, this training takes place onsite at your location or through a virtual classroom. These courses offer hands-on exercises to enhance the learning experience.

# eLearning Courses

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## Learning Experience for QUMAS

The Learning Experience for QUMAS eLearning video bundle contains Document Member, Document Manager, Enterprise Document Management Systems (EDMS), and Enterprise Quality Management Systems (EQMS) Trainings.

### QUMAS Document Member

In this course, general users will learn to navigate throughout the MYQUMAS interface. Document Members retrieve, view, and acknowledge documents have been read and are understood.

Topics	Details
<ul style="list-style-type: none"><li>• Discuss common use practices of MyQUMAS and discover the benefits of the application.</li><li>• Access the MyQUMAS application and identify key components</li><li>• Search and View Documents in MyQUMAS for daily use</li><li>• Acknowledge documents for compliance</li><li>• Perform additional document and workflow functions</li></ul>	<p><b>Duration:</b> 30 minutes</p> <p><b>Prerequisites:</b> None</p> <p><b>Videos:</b></p> <ul style="list-style-type: none"><li>&gt; MyQUMAS Advantage</li><li>&gt; MyQUMAS Exploration</li><li>&gt; MyQUMAS Application</li></ul>

## QUMAS Document Manager

In this course, advanced users such as document managers, authors, contributors, coordinators, editors, and approvers will develop extended knowledge of interface. This course is for those who create, collaborate or approve documents. Learn about document functions, workflow functions and advanced features of the homepage.

Topics	Details
<ul style="list-style-type: none"> <li>• Explore workflow functions in a document manager common use scenario</li> <li>• Explore additional homepage features available to document managers</li> <li>• Create documents within MyQUMAS</li> <li>• Edit documents in MyQUMAS</li> <li>• Modify documents within MyQUMAS workflows</li> <li>• Clone, revise, approve, disapprove or reassign workflows within MyQUMAS</li> <li>• View annotations and update content</li> </ul>	<p><b>Duration:</b> 1 hour</p> <p><b>Prerequisites:</b> QUMAS Document Member</p> <p><b>Videos:</b></p> <ul style="list-style-type: none"> <li>&gt; MyQUMAS Document Manager Overview</li> <li>&gt; MyQUMAS Advanced Exploration</li> <li>&gt; MyQUMAS Document Creation and Editing</li> <li>&gt; MyQUMAS Processes for Document Managers</li> <li>&gt; MyQUMAS Editor and Approver Functions</li> </ul>

# Instructor-Led Courses

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## EDMS Document Member

This course is designed for View Only members of the Electronic Document Management System. The content is based on standard documents available to members via permission. Exercises focus on basic use of the system including: understanding/navigating the EDMS interface, searching, viewing, and printing documents.

Topics	Details
<ul style="list-style-type: none"><li>• Accessing and exiting EDMS</li><li>• Understanding the EDMS interface</li><li>• Searching for Documents</li><li>• Viewing and Printing a Documents</li><li>• Read &amp; Understood</li></ul>	<p><b>Duration:</b> ½-day</p> <p><b>Prerequisites:</b> None</p> <p><b>Location:</b> Onsite or Virtual Classroom</p>

## EDMS Document Manager

This course is designed for Standard users of the Electronic Document Management System. The content is based on advanced use of document and workflow functionality. Exercises focus on the creation and management of documents, creation and management of workflows for review and approval of documents, reporting, and advanced printing.

Topics	Details
<ul style="list-style-type: none"><li>• Creating Documents and Collections</li><li>• Exporting Documents and Collections</li><li>• Editing Documents</li><li>• Creating Workflows</li><li>• Completing Workflow Tasks</li><li>• Working with Reports</li><li>• Accessing Audit Trail</li><li>• Hardcopy Management</li></ul>	<p><b>Duration:</b> 1.5 Days</p> <p><b>Prerequisites:</b> Document Member</p> <p><b>Location:</b> Onsite or Virtual Classroom</p>

## EDMS Local Administration Training

This course provides the knowledge of how to create and edit EDMS objects based on advanced Users that are members of the local\_admin\_grp. The local\_admin\_grp grants users permission to carry out day-to-day admin activities: Add new users, Modify group / role membership, Modify existing workflow instances, Update picklists, formats and monitor basic document jobs.

Topics	Details
<ul style="list-style-type: none"> <li>• Creating Folders</li> <li>• Creating/Managing Users</li> <li>• Creating Permission Groups/Roles</li> <li>• Assigning Permissions to Users and Objects</li> <li>• Modifying Picklists</li> <li>• Adding/Modifying Formats</li> <li>• Monitoring of basic document jobs</li> </ul>	<p><b>Duration:</b> ½-day</p> <p><b>Prerequisites:</b> Document Manager</p> <p><b>Location:</b> Onsite or Virtual Classroom</p>

## EDMS Full Administration Training

This course provides end-to-end knowledge of how to create and manage all EDMS objects for users that are members of the Administrators Role. The Administrators Role grants users Full access to all admin activities in EDMS: Creating/Editing new Document and Workflow Types, Managing Numbering Systems, Lifecycle States, Picklists, Printtypes and Templates. This course also includes all end user Document Member and Document Manager training.

Topics	Details
<ul style="list-style-type: none"> <li>• Repository Configuration – Cabinets and Folders</li> <li>• Meaning of Signatures, Roles and Departments</li> <li>• Users and Groups</li> <li>• Formats, Change Categories, and Keywords</li> <li>• Numbering Systems, Lifecycle States and Picklists</li> <li>• Workflow Types</li> <li>• Document Types</li> <li>• Print types</li> <li>• Document Templates</li> </ul>	<p><b>Duration:</b> 3 Days</p> <p><b>Prerequisites:</b> other EDMS courses recommended</p> <p><b>Location:</b> Onsite</p>

## EQMS Audit End User

This course is designed for members of the Electronic Quality Management System who are involved with conducting and participating in internal and/or external Audits. Exercises focus on creating Audit instances, managing the various Audit processes, along with searching for and reporting on Audits.

Topics	Details
<ul style="list-style-type: none"> <li>• General EQMS overview</li> <li>• Creating and Managing the Auditing Process</li> <li>• Creating and Managing the Audited Process</li> <li>• Creating and Managing Audit Scheduling</li> <li>• Searching for Audit Instances</li> <li>• Audit Reporting</li> </ul>	<p><b>Duration:</b> 1 Day</p> <p><b>Prerequisites:</b> None</p> <p><b>Location:</b> Onsite</p>

## EQMS CAPA End User

This course is designed for members of the Electronic Quality Management System who are involved with any part of the CAPA process. Exercises focus on creating CAPA instances, participating in the CAPA process, along with searching for and reporting on CAPAs.

Topics	Details
<ul style="list-style-type: none"> <li>• General EQMS overview</li> <li>• Creating and Managing the CAPA Process</li> <li>• Searching for CAPA Instances</li> <li>• CAPA Reporting</li> </ul>	<p><b>Duration:</b> ½-day</p> <p><b>Prerequisites:</b> None</p> <p><b>Location:</b> Onsite</p>

## EQMS Change Control End User

This course is designed for members of the Electronic Quality Management System who are involved with any part of the Change Control process. Exercises focus on creating Change Control instances, participating in the Change Control process, along with searching for and reporting on Change Controls.

Topics	Details
<ul style="list-style-type: none"> <li>• General EQMS overview</li> <li>• Creating and Managing the Change Control Process</li> <li>• Searching for Change Control Instances</li> <li>• Change Control Reporting</li> </ul>	<p><b>Duration:</b> ½-day</p> <p><b>Prerequisites:</b> None</p> <p><b>Location:</b> Onsite</p>

## EQMS Complaint End User

This course is designed for members of the Electronic Quality Management System who are involved with any part of the Complaint process. Exercises focus on recording Complaints, participating in the Complaint process, understanding the HIPAA role in the Complaint process, along with searching for and reporting on Complaints.

Topics	Details
<ul style="list-style-type: none"> <li>• General EQMS overview</li> <li>• Recording and Managing the Complaint Process</li> <li>• Understanding the Complaint HIPAA Role</li> <li>• Searching for Complaint Instances</li> <li>• Complaint Reporting</li> </ul>	<p><b>Duration:</b> ½-day</p> <p><b>Prerequisites:</b> None</p> <p><b>Location:</b> Onsite</p>

## EQMS Deviation End User

This course is designed for members of the Electronic Quality Management System who are involved with any part of the Deviation process. Exercises focus on recording Deviations, participating in the investigation and resolution of the Deviation, along with searching for and reporting on Deviations.

Topics	Details
<ul style="list-style-type: none"> <li>• General EQMS overview</li> <li>• Recording and Managing the Deviation Process</li> <li>• Searching for Deviation Instances</li> <li>• Deviation Reporting</li> </ul>	<p><b>Duration:</b> ½-day</p> <p><b>Prerequisites:</b> None</p> <p><b>Location:</b> Onsite</p>

## EQMS Local Administration Training

This course provides the knowledge of how to create and edit EQMS objects based on advanced Users that are members of the Local Administrators Role. The Local Administrators Role grants users permission to carry out day-to-day admin activities: Add new Users, Modify Role membership, Modify Custom Lists, Managing Numbering Systems, Understanding the Data Correction Role, Task User Administration, and Reporting.

Topics	Details
<ul style="list-style-type: none"> <li>• Understanding the EQMS Interface</li> <li>• Adding/Managing Users</li> <li>• Managing Roles</li> <li>• Modifying Custom Lists</li> <li>• Numbering Systems and Sequences</li> <li>• Saved Searches</li> <li>• Data Correction Role</li> <li>• Task User Administrator</li> <li>• Reporting</li> </ul>	<p><b>Duration:</b> ½-day</p> <p><b>Prerequisites:</b> other EQMS courses recommended</p> <p><b>Location:</b> Onsite</p>

## EQMS Full Administration Training

This course provides end-to-end knowledge of how to create and manage all EQMS objects for users that are members of the Administrators Role. The Administrators Role grants users Full access to all admin activities in EQMS: Creating/Editing new Process Types, Managing Supporting Objects, Setting Permissions, Organizing Menus and Views, Advanced Searching and Reporting.

Topics	Details
<ul style="list-style-type: none"> <li>• Introduction to Process Compliance System Administration</li> <li>• User Interface</li> <li>• System Administration</li> <li>• System Permissions</li> <li>• User Administration</li> <li>• Classifications</li> <li>• Roles</li> <li>• Process Types</li> <li>• Supporting Objects</li> <li>• Numbering</li> <li>• Custom Lists</li> <li>• External Data Locations</li> <li>• Grids and Records</li> <li>• Signature Definitions</li> <li>• Permissions</li> <li>• Fields</li> <li>• Pages/Styles</li> <li>• Workflow</li> <li>• Configuring Steps</li> <li>• Conditions and Sections</li> <li>• Business Rules and Actions</li> <li>• Menus and Views</li> <li>• Reports and Searching</li> </ul>	<p><b>Duration:</b> 3 Days</p> <p><b>Prerequisites:</b> Other EQMS courses recommended</p> <p><b>Location:</b> Onsite</p>