



Guide to
Learning Services



Foreword

Did you know **only about 20%** of software features are frequently used and **more than 50%** are never used? At MasterControl, our education services will help you optimize the MasterControl platform and realize the full value of your investment.

We know change isn't easy, but we believe it can be a lot easier. A comprehensive learning strategy will ensure that you're ready for implementation, launch, and platform optimization. Our customer learning services will help accelerate time-to-competency and time-to-value.

With that goal in mind, we developed a dynamic library of digital learning resources designed for flexible delivery—providing easy access to the expertise you need.

Self-Study Learning: A subscription to the self-study library ensures real-time access to the learning paths and microlearning content needed for performance support, reference, and reinforcement.

Consultant-Led Training: Consultant-led training provides learners with the insight and hands-on practice that is especially valuable for an initial discovery of the platform.

End-User Training: Your in-house trainers and leaders can leverage our content to train others while maintaining your training records in MasterControl.

Certified Admin Digital Credential: Experienced admin-level users can take certification exams to demonstrate proficiency with our five most-used modules.

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Cash in your investment

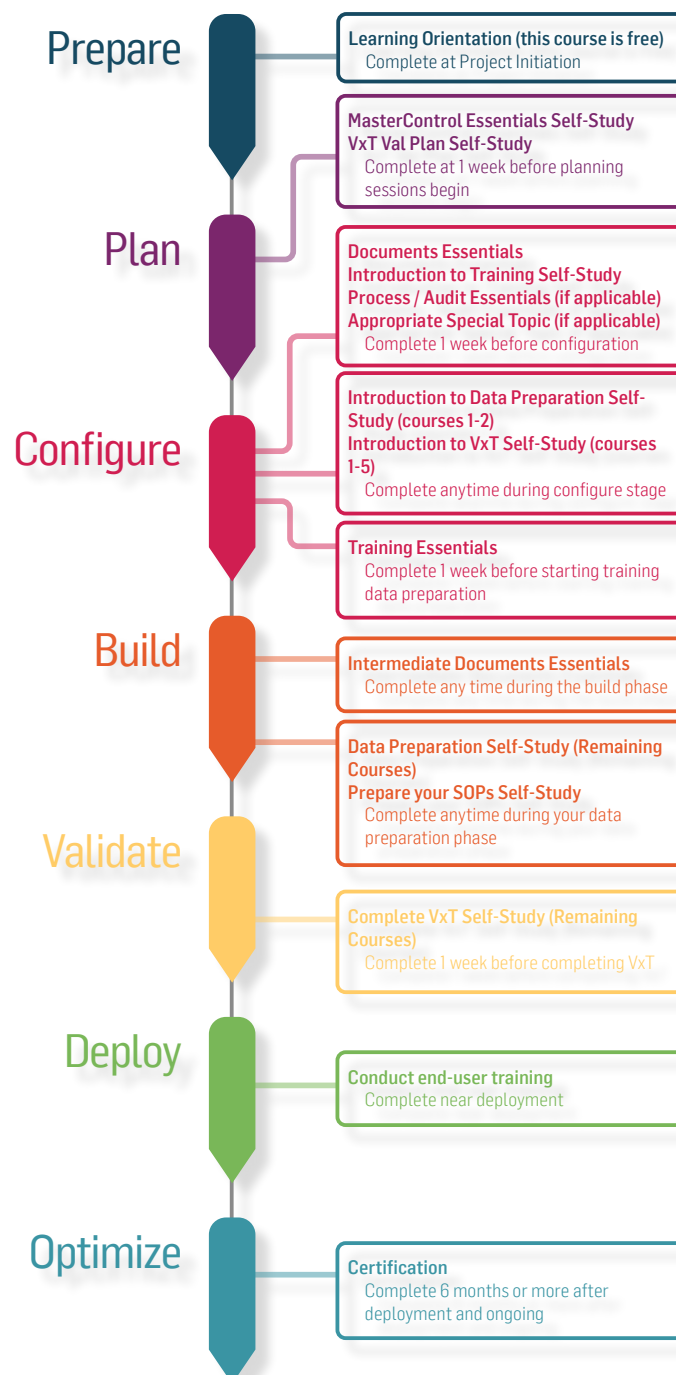
Leveraging MasterControl's customer learning services will **accelerate** time-to-competency of your team members, **decrease cost** to develop and maintain materials, and **increase the value** your organization can realize from the MasterControl platform. We also maintain and update content as the system evolves, prioritizing updates that have the most impact on learners. Finally, our resources support lifetime product value with learning paths for different audiences and advanced content to develop admin expertise over the long term.

[Schedule a free appointment](#) with our learning consultants to discover how you can use our learning services and minimize the in-house effort needed to create and maintain training. They can help you to:

- Select **learning paths** for different types of users.
- Identify **key moments of need** in which learning will be most impactful.
- **Scale our offerings up or down** depending on your organization's specific needs.

When to take training

We recommend you enroll in classes close to when you'll configure the respective module or no earlier than one week prior to configuration. The recommended sequence below covers some common implementation learning needs. We'll go into more detail about when to take your training in the **MasterControl Learning Orientation**. Your implementation journey will include seven phases, and you'll want to enroll in courses when you enter each phase.



Learning orientation

To help accelerate your MasterControl implementation and increase adoption with your users, we've created this virtual learning experience to welcome you to MasterControl. This class has open enrollment, and anyone on your core implementation team can register. We review the Welcome to MasterControl and MasterControl Essentials (Pre-work) courses in this orientation as well. **Duration:** 2 hours

Essentials series

The Essentials series is our foundational curriculum for SysAdmins, Module Admins, and other specialists. This series also prepares implementation team members for configuration. We offer individual courses that focus on the following modules: Documents, Intermediate Documents, Training, Process, Production Records, and Audit; we also offer a New Admin Essentials course. Contact your account representative to determine the ideal courses and schedule for your project.

Format: Available as consultant-led instruction or self-study; can be a public or private class (either virtual or at your location).

Pre-requisites: Learning Orientation; Documents Essentials is a prerequisite for other courses in this series (except New Admin Essentials). Some classes may assign self-study prework to be completed prior to class or consultant lab time.

Timing: To maximize retention, we recommend you complete training within 1 week of the corresponding activities in your implementation. If you complete your training earlier, please refresh your understanding using the learner path in the self-study library with the content for the course. Our team can provide you with [specific recommendations](#) based on your implementation.

Documents/Training Foundations

Documents/Training Foundations is a comprehensive three-day in-person course taught by experienced consultants that covers the essentials of administering the Documents and Training Modules in MasterControl. Whether you prefer to take the course in Salt Lake City or have it taught at your organization's headquarters, this course is an excellent option for those who value in-person learning. By the end of the course, attendees will have a solid understanding of the foundational principles of MasterControl and be equipped with the skills needed to manage the Documents and Training Modules effectively.

Format: Available as in-person consultant-led instruction; can be at MasterControl's headquarters in Salt Lake City or your location.

Pre-requisites: Learning Orientation (recommended)





Consultant-led training

We periodically hear customers say they need their education experience to be adapted to their company's configuration requirements. That's why we've expanded our consultant-led training to be more **flexible** and **customizable** based on your specific needs. Our learning consultants have years of experience, often as MasterControl SysAdmins, customers, or experts in the quality and manufacturing industry. They have first-hand experience with the challenges and successes of systems implementations and are uniquely qualified to guide you and answer your questions.

Along with the added value of in-person learning, the curriculum has been professionally designed by learning experience designers and learning consultants to adhere to education research best practices. Our consultant-led training uses blended learning to help your team learn in different ways and feel confident applying their knowledge to your configuration with:

1. **On-site or virtual learning**, depending on what suits your learners' preference
2. **Video walk-throughs**, where an expert demonstrates everything you need to know to administer the module
3. **In-site practice activities**, which help you develop familiarity and confidence with using the system
4. **Assessments**, which help you apply and test your knowledge

Hours for your consultant-led training can be applied to any of the following three phases depending on where you need support:

- 1 Orientation and planning.** Just after kickoff, a learning consultant will meet with your team for learning orientation to plan the layout of the course delivery.
- 2 Essentials delivery.** As the project progresses, the learning consultant will meet with your team in 2-3-hour blocks, discussing the course content and resolving any challenges in preparation for the next phase in implementation.
- 3 Go-live preparation.** In the weeks before go-live, the consultant presents the go-live toolkit and end-user training, ensuring your team is ready for strong adoption.

If you need additional consultant time to troubleshoot a specific problem or get advice, you can purchase consultant office hours. Contact your account representative or email educationcenter@mastercontrol.com to learn more.

Special topics

Our Special topics support customers through their implementation and adoption of MasterControl, including the full lifecycle with end-user and upgrade training. Special topics classes also include specialized and advanced content, which is useful during implementation or expansion of your platform.

Format: Virtual, private instruction.

Pre-requisites: Learning Orientation; Welcome to MasterControl

Duration: Each lesson is approximately 2 hrs., and some topics require 2 lessons.

Enrollment: Up to 12 learners for topics with hands-on activities (larger classes may be an option for demo-only training for end users).

Recommended audience: The audience will vary by topic. Most topics in this series target the needs of admins, specialists, and implementation team members who have already been through the Essentials (particularly Documents Essentials, which is a prerequisite for other consultant-led training). The exception is end-user training, which would not have a prerequisite and would target the needs of end users.

Here's a list of our special topics classes. View the [Special topics appendix](#) at the end of this document for in-depth course descriptions.

- **Analytics** (2 units cover Documents and Training with Process optional)
- **Bill of Materials (BOM)**
- **Document Administrator/Doc Admin***
- **End-User Training**
- **eTMF** (Electronic Trial Master File; 2 units)
- **Enhanced Forms** (Form-Specific)
- **Form Builder Preview** (2 units; also included with [Process Essentials](#))
- **Insights** (for Premium customers)
- **Process Overview**
- **Projects**

- **Registrations**
- **Risk**
- **Supplier**
- **Upgrade Training** (upgrading from older versions may require customization)

* Must complete Documents Essentials first

Public and private class options

In the US, public classes are scheduled at regular intervals depending on the current demand, and enrollment is open to all customers. Select the [class schedule from the customer website](#) for availability. For alternatives outside of the US, please see [Global Considerations](#).

Private classes are scheduled specifically for your organization's learners, allowing for more focused class discussion and team alignment. Any courses in the Essentials Series are available as either public or private classes; the short-format lessons included in our Special Topics are only available privately.

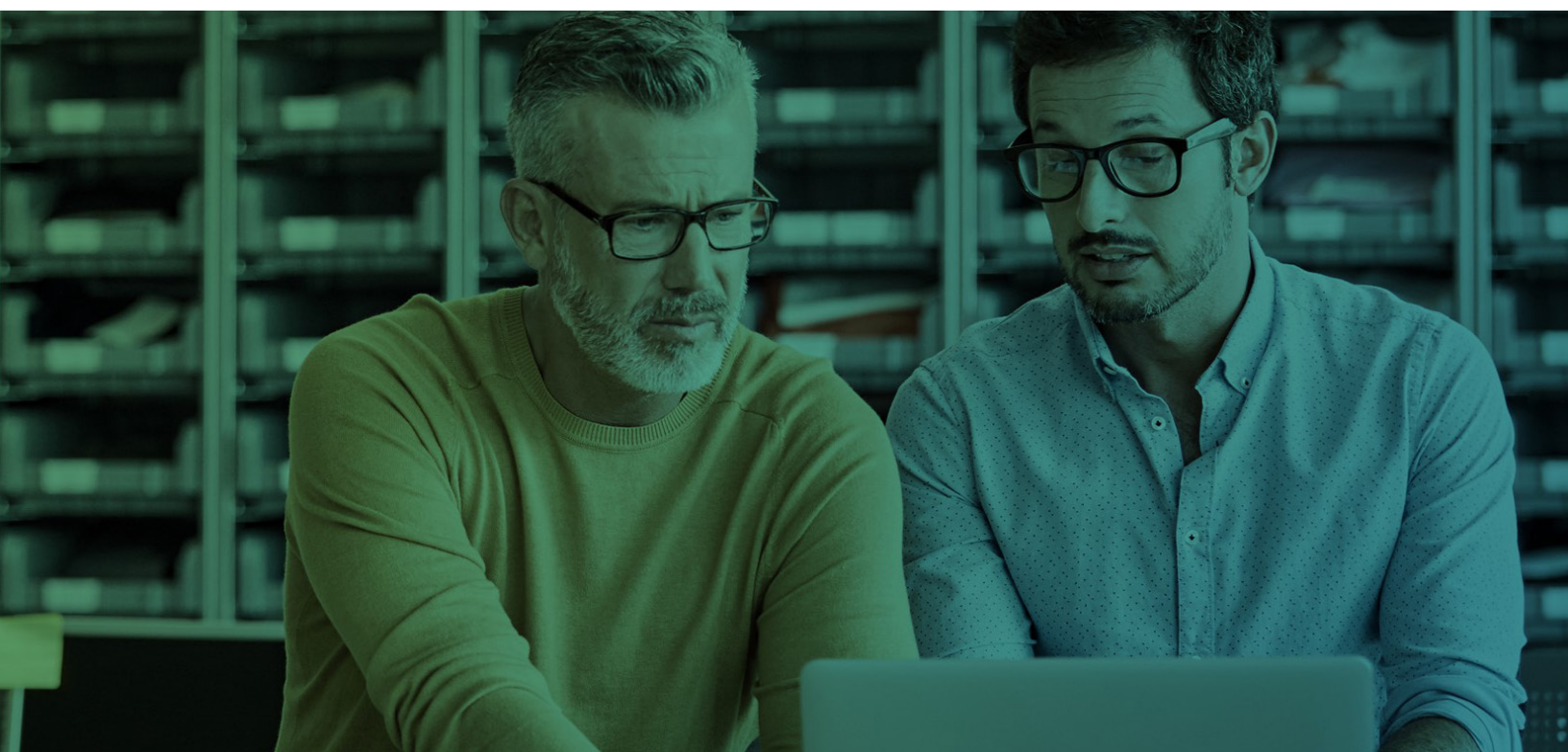
Format: Most of the consultant-led training for public classes is virtual. Private classes may be either virtual or at the customer location.

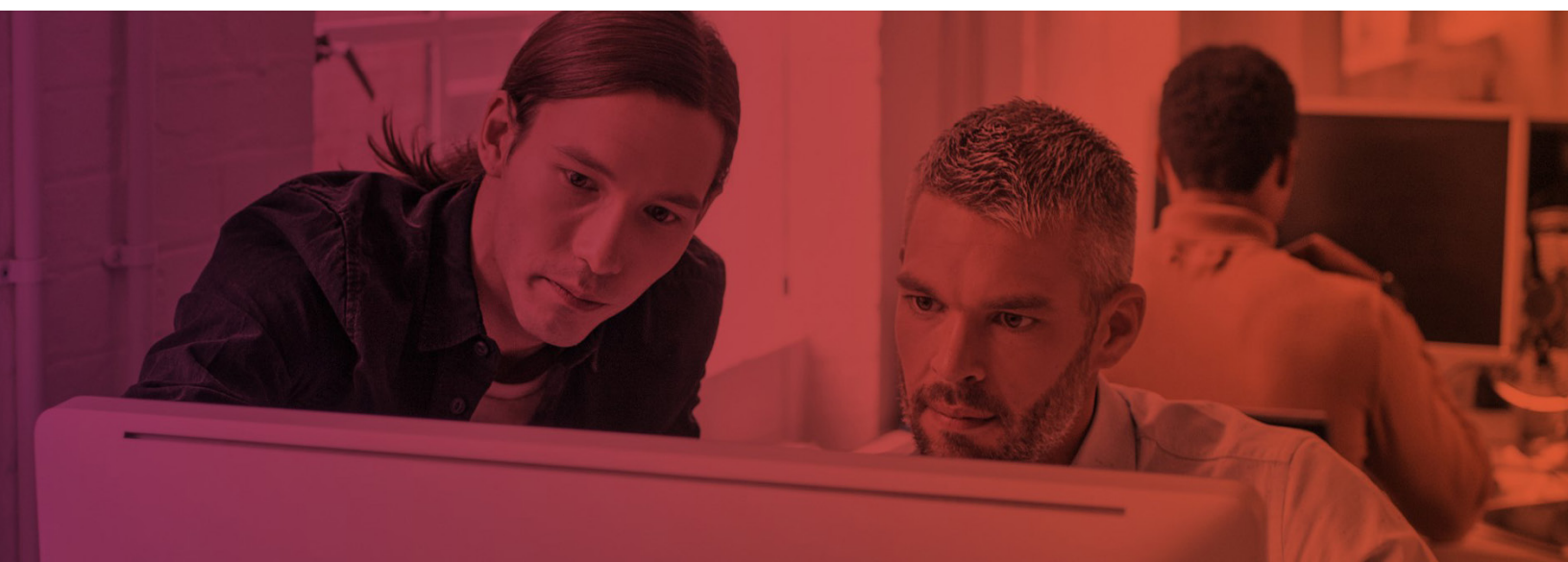
Pre-requisites: Learning Orientation; Documents Essentials

Enrollment: Limited to 12 enrollments for public or private classes to facilitate hands-on activities (up to 50 learners may be invited to demo-only lessons for end users).

Scalability: Private classes will be more economical when there are more than 4 team members to be trained (private sessions can also be recorded for later playback or for viewing by team members in different time zones).

Upon request: Customization, while available, is not often advisable or sustainable (please consult with one of our learning experts on whether customization makes sense for your organization).





Self-study learning

MasterControl's self-study library features short, 3–4-minute microlearning tutorials that target specific tasks in the software, such as creating InfoCards, completing training tasks, and assigning action items. These courses maximize learner control, access, and utility of the content.

MasterControl's self-study library includes hundreds of tutorials on a wide range of topics. These materials complement and extend the value of facilitated learning through use as:

- **Prework**, as preparation in advance of a scheduled class
- **Reinforcement**, as a reminder of key points following training
- **Preparation**, in advance of key project milestones (for engagements with implementation consultants)
- **Reference**, to access answers or instructions in the moment of need

These tutorials typically include:

- System and module-level overviews
- Process & workflow descriptions
- Deep dives into key features
- Step-by-step instructions
- Best practices
- Tips & tricks

Learners can access this content at any time by logging in to MasterControl's [customer website](#) and selecting the Self-Study Learning Portal. You can also select [this link](#) to view an introduction to accessing and using the learning portal. When you've logged into the learning portal, we

recommend starting with the Welcome to MasterControl course. Access to the self-study library is included with all active licenses.

Here are a few key parameters of the self-study library:

Audience: SysAdmins, Module Admins, & specialists; core implementation team members; document control managers, training managers, quality team members, or IT managers with responsibilities for platform configuration or maintenance

Access: Password-protected learning portal administered by MasterControl and shared by all customers.

Language: English (although web page content may be machine-translated in select browsers)

Reporting: This product does not include reporting or delivery of training records.

Our learning portal is not intended for use as a learning management system (LMS) or as a tool for managing training records. To meet your needs to deliver end-user training and keep training records, we recommend MasterControl! See [End-user training](#) for further details or [schedule a consult](#) on end-user training with a learning consultant.

Learning paths

In addition to the microlearning tutorials on our learning portal, we've curated learner paths that collect, organize, and sequence smaller lessons. These paths may be aligned with the curriculum for a particular course or MasterControl module or they may target specific use cases. Select [this link](#) to learn more about learning paths.

[Go to self-study library](#)

End-user training

In addition to preparing your core implementation team, it's vital to prepare end users for a new or upgraded platform. Also, because some users may not use the system every day, the best approach may be a combination of up-front classroom instruction with self-study and just-in-time resources.

Here are some of the options available:

- **Use MasterControl:** To manage, track, and verify end-user training records, you'll want to use the MasterControl Training Module. You'll need to upload your training materials to MasterControl, and we have step-by-step instructions on how to do this.
- **Send weblinks:** Don't need to track or verify training? You can cut to the chase and send the training via email through weblinks.
- **Modify a slide deck:** Your SysAdmin(s) can use our customizable slide decks to train your end users.
- **Video overview:** These end user basics videos introduce how to navigate the MasterControl interface from an end user perspective.



Getting started

We're proud to say that a majority of MasterControl customers have been with us for more than 10 years, and we know customers' needs change through the duration of our partnership. That's why we've designed customer learning to meet key needs during each part of that lifecycle.

Discovery: Our consultant-led training combined with self-study will guide you through those first-time learning needs.

Application: Our learning resources align with key moments in the platform configuration. Taking the right training (or a refresher) near the point of need strengthens retention. The microlearning format of the self-study materials and the search feature of the learning portal enable easy, just-in-time access.

Reference: You won't remember everything. Sometimes, you'll need quick access to information. The self-study library is the most comprehensive source of information about our platform. Start here when you have a question or need content refreshers.

Development: We offer advanced topics that go beyond implementation to share efficient practices, get you up-to-speed on upgrades, or help you progress as a MasterControl SysAdmin. Also, keep reading to learn about our [digital credential program](#).



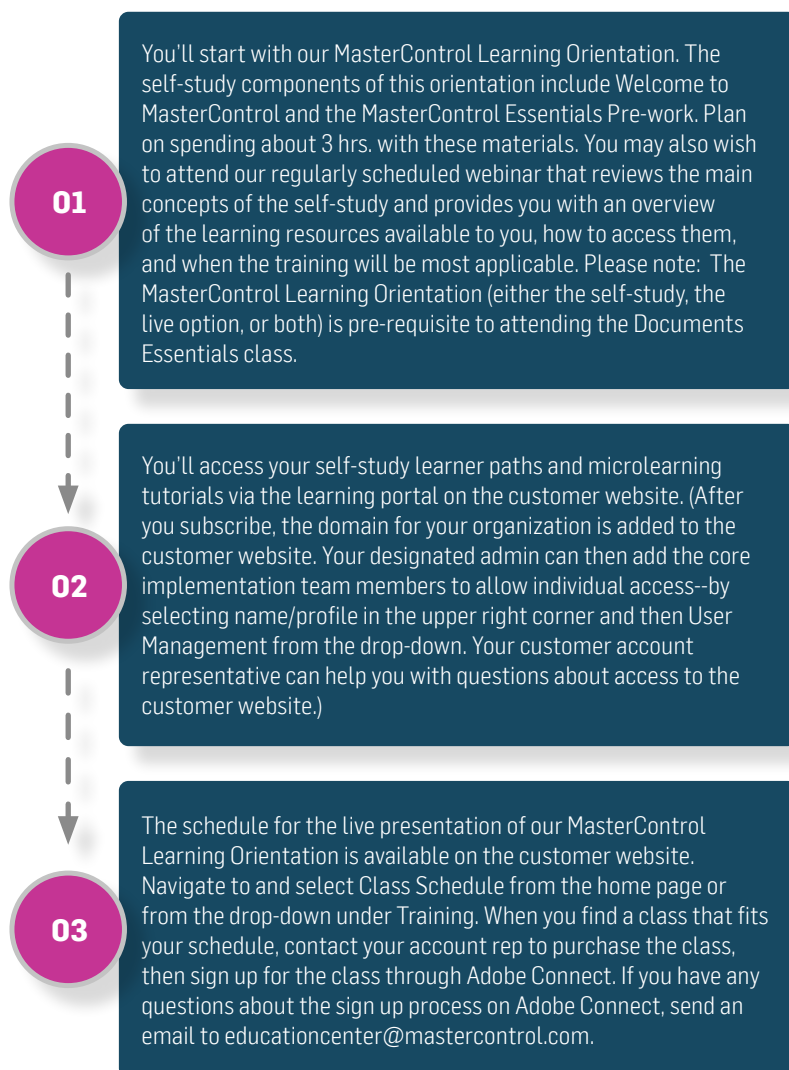
Certified Admin digital credentials

The MasterControl Certified Admin digital credential program is for experienced admins to certify their system knowledge and skill. We offer five certification exams for the following MasterControl modules: Documents, Training, Process, Audit, and Production Records (Mx). The number of certification exams an admin passes corresponds to their level. For example, if someone passed the Documents and Process exams, they'd be a Level 2 Certified Admin.

We recently launched a sixth exam we're calling the Certified Expert exam. This exam focuses on advanced MasterControl troubleshooting concepts. And unlike the Levels 1–5 certification exams, the Certified Expert exam focuses on cross-module functionality in MasterControl. Admins must earn their Level 5 credential before attempting this exam. Select [this link](#) to learn more about the Certified Admin program.

Preparing for class and your implementation

At the start of a new implementation or significant upgrade, the readiness of your core implementation team should be a high priority. We want to help you get ready at each step of your journey.



Public class schedule

You can use the public class schedule to see when public classes will be held and to check availability. You cannot use the class schedule to enroll in a class (as those enrollments are typically sold as part of your agreement with MasterControl). Those who have already purchased their individual enrollments can register for a class that fits your schedule directly from Adobe Connect.

Global considerations

If you do not find convenient options for public classes due to time zones or language considerations, please [check with us](#) to discuss possible options. We have offices in EMEA and APAC, as well as a network of certified partners.

Currently, our materials are only available in English, but we've included features that may be useful to those for whom English is not their first language:

- Recorded instruction includes English-language captioning that may be useful for non-native speakers of English.
- We develop our course materials in a Web format that allows users to use their browser translation features for an automated translation. (Please note that this feature is not available in all browsers, and machine translation may be incomplete and is less accurate than human translation.

Recommendations

The MasterControl platform is used in different industries and to meet different objectives. We're eager to guide you with recommendations on the most direct path to learning success. Often, when the menu is large, it can be hard to place an order. We can guide you in making those decisions.

Are you new to MasterControl? If you're a new customer, you'll soon interact with Professional Services on your implementation. You'll designate a SysAdmin and create an implementation team. Your priority is to prepare those team members. If you're an existing customer, consider what additional training needs you have. Do you need to train new team members, implement updates or platform expansions, or simply receive more value from the system?

What features of MasterControl are you implementing and in what sequence? When a customer implements MasterControl, there's typically an implementation sequence, which often includes an order to the modules you'll implement. You should align your training with the implementation sequence to maximize your learning retention. Ideally, you'll complete either the training or the self-study learning close to when you'll use the information (~1 week).

Who will need to be trained? While we encourage you to prioritize implementation and core team needs, you'll also need to plan for the learning needs of end users.

Frequently asked questions

In addition to the standard recommendations already discussed in this guide, it's worth noting a few specialized recommendations that may be (or may become) relevant:

Q: What do you recommend for Mx Customers?

A: Most Mx Customers will implement Documents and other modules, so you can follow the [Essentials](#) track. For Mx-specific training, enroll in the [Production Records Overview](#) (Special Topics) prior to the module's implementation. There is a corresponding self-study learning path with an overview and additional content for builders and operators.

Q: What do you recommend when a previously trained SysAdmin leaves and we need to onboard a new admin?

A: For existing customers, not currently implementing or expanding the platform, you might opt for an accelerated track for your new admin. We offer a [New Admin Essentials](#) class to cover the basics. You could pair this with self-study material on Welcome to MasterControl and the complimentary class offering of MasterControl [Essentials](#) (Pre-Work) for your new admin onboarding needs.

Q: What is available for customers upgrading to the Classic 20 version of MasterControl?

A: There are three options to meet your needs. Please note that for Classic 20, a pre-sales [learning consult](#) helps to ensure that we match your need to the right content.

1. For those upgrading to Classic 20, we offer Upgrade Training and End-User Training tailored to Classic 20 and specific to the new features from your previous version of MasterControl. These are available as private, virtual classes and require customization.
2. For comprehensive training of core implementation team members or new admins, we offer Classic-20 versions of many of our popular [Essentials](#) classes (private classes only), and our standard curriculum can also be adapted for private classes.
3. For self-study, there are select materials specific to

Classic 20, including an overview, but the standard library resources can also be utilized (noting the few differences called out in the overview).

Q: What do you recommend for Enhanced Forms (FBS)?

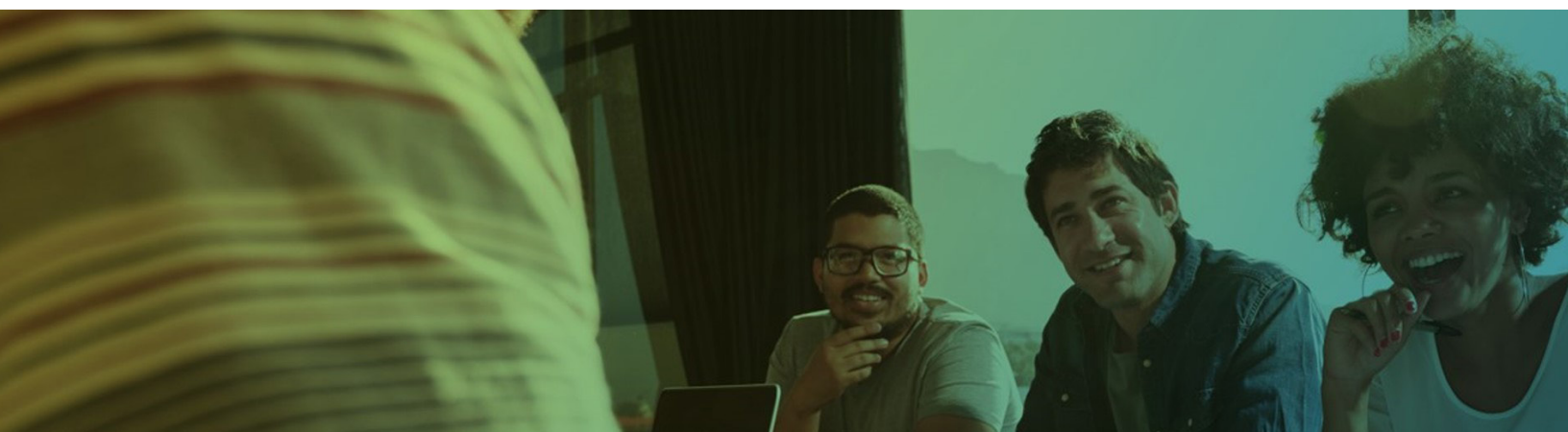
A: The most comprehensive option is to take [Process Essentials](#). It covers the Process Module, Enhanced Forms, and Form Builder. [Enhanced Forms](#) and [Form Builder](#) are also available as stand-alone classes (Special Topics) for existing customers who may have already completed Process Essentials but need a refresher. During the class on Enhanced Forms, we review the configuration and use of specific quality event forms that you'll be using. Our self-study library also contains individual courses on each Enhanced Form; these are most effective if taken after Process Essentials.

Q: Can your learning materials be copied and distributed?

A: Because we use a flexible, digital-learning format to enable both consultant-led training and self-study learning, learning materials are only available as web pages. However, access to the latest version of the self-study library material is free with your solution package purchase. Implementation team members will appreciate the ease of quick access via the learning portal available through the customer website. End users may receive training via your preferred method from options suggested in the End User Playbook (available through the Self-Study Library). For legacy customers, we can help with end-user training, SCORM downloads, and using MasterControl for your training records.

Q: How can I troubleshoot a performance issue with the self-study library?

A: Should you come across an issue with the materials in the self-study library, please email educationcenter@mastercontrol.com. We'll respond to your email within one business day. For problems accessing the customer website, please contact your Customer Account Representative.



What's next?

If you have questions about anything contained in this document, contact your sales representative or email educationcenter@mastercontrol.com. We're eager to provide you with the educational resources you need so you can bring life-changing products to more people sooner.

The following appendices contain course agendas and details for the consultant-led [Essentials Series](#) courses and course descriptions for our [Special Topics](#) courses.

Appendix: Essentials/Fundamentals Series

Documents Essentials

Recommended audience: SysAdmins, Documents Module Admins, and specialists; core implementation team members; document control managers or IT managers with responsibilities for platform configuration or maintenance.

Description: A prerequisite to other consultant-led training, Documents Essentials is the first of three courses which define the concepts for configuration of MasterControl Documents. The other course is Intermediate Documents Essentials. We will introduce best practices for controlling and managing documents using MasterControl and create a baseline configuration in a practice site to prepare you for your configuration. This course is offered as a consultant-led course or as a learning path in the self-study library.

Pre-requisites: Completion of the Welcome to MasterControl and MasterControl Essentials Pre-Work before attendance.

Optional review: A complimentary offering of MasterControl Learning Orientation class is available for those who are brand new to MasterControl.

Course objectives: In this course, you'll learn how to:

- Navigate the platform
- Define configuration concepts for MasterControl Documents
- Define configuration concepts for the Documents Module in addition to overall platform navigation
- Use MasterControl to implement a business process
- Prepare for an initial implementation, a significant upgrade, or an expansion of your platform
- Maintain MasterControl in your role as a SysAdmin or DocAdmin

Content agenda (we'll provide a detailed agenda with timeframes in advance of class)

1. Introduction

- Review of Welcome to MasterControl
- Review of MasterControl Essentials (Pre-work)

2. Doc Admin Functions

- | | |
|----------------------|---------------------------------------|
| a. Reassign Tasks | e. Use Organizers |
| b. Abort Tasks | f. Create a Controlled Copy |
| c. Recall InfoCards | g. Troubleshoot PDF Publishing Errors |
| d. Use Quick Approve | |

3. Module Admin Functions

- | | | | |
|--|--------------------------------------|-------------------------------|--|
| a. Configure InfoCard Types | f. Use Custom Fields | l. Start a Workflow | t. Build an Administrative Change Workflow |
| b. Configure InfoCard Subtypes | g. Configure Custom Fields | m. Use Collaboration Steps | u. Build a One-Step Workflow |
| c. Configure Lifecycles and Vaults | h. Choose a Role Type | n. Use Notify Steps | v. Separate New and Revision Workflows |
| d. Choose a Document Numbering Series | i. Configure a Rights-Based Role | o. Use Review Steps | w. Configure Packet Types |
| e. Configure a Document Numbering Series | j. Configure a Non-Rights-Based Role | p. Use Approval Steps | x. Prepare for Configuration |
| | k. Simplify and Enhance Workflows | q. Use Parallel Steps | |
| | | r. Use Escalation Steps | |
| | | s. Build an Obsolete Workflow | |

Appendix: Essentials/Fundamentals Series

Training Essentials

Recommended audience: SysAdmins, Module Admins, Training Admins, & specialists; core implementation team members; training coordinators or IT managers with responsibilities for platform configuration or maintenance.

Description: Training Essentials introduces configuration concepts specific to the Training module within MasterControl. You'll learn to configure the Training Module; how to manage roles, courses, exams, reports, etc. This course is offered as a consultant-led course or as a learning path in the self-study library.

Pre-requisites: Welcome to MasterControl, MasterControl Essentials Pre-Work, and Documents Essentials.

Course objectives: In this course, you'll learn how to:

- Set up and manage records for training activities
- Configure Training module settings
- Develop and schedule reports

Content agenda (we'll provide a detailed agenda with timeframes in advance of class)

1. Training Module Overview		
a. Review Training Roles b. Approve Trainee InfoCards	c. Complete a Training Task d. Review My Training Folder	e. Understand Training Gates
2. Training Configuration		
a. Configure a Training Document b. Configure a Training Course c. Auto-Create a Course d. Configure the Document-Course	Connection e. Configure Exams f. Configure Job Codes g. Use Recall and Approve	h. Use Edit and Save i. Use Different Course Types
3. Configure Training Module Settings		
a. Use Trainer InfoCards b. Create Trainer InfoCards c. Create Classes d. Add Class Times	e. Manage Classes f. Create Certificate Templates g. Issue a Training Certificate h. Perform Group Sign Off/Group Verify	i. Manage Training Folders j. Review Job Code Status
4. Reports		
a. Create Customized Reports i. Add Columns and Column Properties ii. Rebuild a Table iii. Add Formulas	iv. Add Aggregations v. Use Charts vi. Filter Controls vii. Save a Report as Public or Private	b. Create Training-Specific Reports c. Schedule Recurring Reports

Appendix: Essentials/Fundamentals Series

Documents and Training Fundamentals

Recommended audience: Those with preferences for in-person learning; SysAdmins, Module Admins, Documents and Training Admins, & specialists; core implementation team members; training coordinators or IT managers with responsibilities for platform configuration or maintenance.

Description: Documents & Training Fundamentals will replace the customer taking the separate courses of Documents Essentials & Training Essentials. The class is conducted in person across three days at a lower cost. Class can be conducted at MasterControl in Salt Lake City or at the customer's site. This is the ideal choice for customers desiring in-person training.

Pre-requisites: Welcome to MasterControl and MasterControl Essentials Pre-Work

Course objectives: In this course, you'll learn how to:

- Navigate the platform
- Define configuration concepts for MasterControl Documents
- Define configuration concepts for the Documents Module in addition to overall platform navigation
- Use MasterControl to implement a business process
- Prepare for an initial implementation, a significant upgrade, or an expansion of your platform
- Maintain MasterControl in your role as a SysAdmin or DocAdmin
- Set up and manage records for training activities
- Configure Training module settings
- Develop and schedule reports

Content agenda (we'll provide a detailed agenda with timeframes in advance of class)

Day 1		
Introductions & agenda Overview of MasterControl Key terms and roles InfoCard overview	End-User Training Training tasks Recall/Quick Approve Tracking	Document configuration InfoCard Types & Subtypes Lifecycles & Vaults Numbering Custom Fields
Day 2		
Configuration continued Roles Create Users Workflows (approval and obsolete)	Packets Templates and Organizers Training Module Configuration Overview and Training Gates	Main Elements Training Folders Group Sign-off/Group Verify
Day 3		
Training Configuration continued Trainees Courses Exams Job Codes	Test entire configuration Add additional content SCORM files, infographics, links Forms (on-the-job training) Training Settings	Disable users Analytics

Appendix: Essentials/Fundamentals Series

Intermediate Documents Essentials

Recommended audience: SysAdmins, Documents Module Admins, and specialists; core implementation team members; document control managers or IT managers with responsibilities for platform configuration or maintenance.

Description: Intermediate Documents Essentials introduces more sophisticated configuration concepts to help you efficiently control and manage documents in MasterControl. You'll learn different types of workflows, review global settings, and discuss system-management practices. This course is offered as a consultant-led course or as a learning path in the self-study library.

Pre-requisites: Welcome to MasterControl, MasterControl Essentials Pre-Work, and Document Essentials.

Course objectives: In this course, you'll learn how to:

- Perform simple maintenance of the MasterControl platform in your role as an admin
- Prepare your data

Content agenda (we'll provide a detailed agenda with timeframes in advance of class)

1. Configuration Review

2. Training Configuration

a. Create a Lifecycle to Manage Organizers

b. Build a Taxonomy Organizer
c. Create a Virtual Folder

d. Build a State Organizer

3. Templates

a. Increase Efficiency with Templates
b. Create a Template with Document Stamping

c. Associate Templates with InfoCards

d. Creating Template with a Mac
e. Test Your Template

4. System Settings & User Management

a. Configure Global Settings
b. Create a New User

c. Edit User Profiles
d. Disable a User

5. System Management

a. Change InfoCard Information
b. View Audit Log

c. Use Fillable Fields
d. Manage the Publishing Queue

6. Reports

a. Create Customized Reports
i. Add Columns & Column Properties
ii. Rebuild a Table
iii. Add Formulas

iv. Add Aggregations
v. Use Charts
vi. Filter Controls
vii. Save a Report as Public or Private

b. Create Document-Specific Reports
c. Schedule Recurring Reports

Appendix: Essentials/Fundamentals Series

Process Essentials

Recommended audience: SysAdmins, Process Module Admins, & specialists; core implementation team members; quality or IT managers with responsibilities for platform configuration or maintenance.

Description: This course introduces configuration concepts specific to the Process Module, including an overview of Enhanced Forms and Form Builder. This course is offered as a consultant-led course or as a learning path in the self-study library.

Pre-requisites: Welcome to MasterControl, MasterControl Essentials Pre-Work, and Documents Essentials.

Course objectives: In this course, you'll learn how to:

- Maintain the MasterControl Process module
- Use and implement Enhanced Forms
- Create and manage analyzer agents
- Implement eForms using Form Builder

Content agenda (we'll provide a detailed agenda with timeframes in advance of class)

1. Process Module Overview

- | | | |
|----------------------------------|---------------------------------------|--|
| a. Launch an Enhanced Form | Workflow Steps | j. Use Extension Requests |
| b. Build Enhanced Form Workflows | f. Modify Steps | k. Configure Enhanced Forms |
| c. Use a Risk Matrix | g. Launch Action Items | l. Configure Enhanced Forms:
Appendix |
| d. Use Common Elements | h. Initiate and Complete Action Items | |
| e. Complete Enhanced Form | i. Fulfill Action Item Assignments | |

2. Analyzer Agents

- | | | |
|--------------------------------------|---------------------------|--|
| a. Capture Data with Analyzer Agents | b. Manage Analyzer Agents | c. Launch a Process from an Analyzer Agent |
|--------------------------------------|---------------------------|--|

3. Data Structures

- | | | |
|-------------------------------------|---------------------------|---------------------------|
| a. Use Enhanced Form Common Reports | b. Manage Data Structures | d. Import Data Structures |
| | c. Update Data Structures | e. Use Mapping |

4. Form Builder

- | | | |
|--------------------------------------|---|--------------------------------|
| a. Understand the Benefits of eForms | g. Create eForm Roles | InfoCard |
| b. Design a Form | h. Build New Data Structures | l. Create and Enable Workflows |
| c. Design a Workflow | i. Download and Populate the Excel File | m. Test Your eForm |
| d. Configure an eForm | j. Preview the eForm | n. Update eForms |
| e. Design eForm Lifecycles | k. Create the eForm Template | |
| f. Build eForm Numbering Series | | |

5. Reports

- | | | |
|--------------------------------------|----------------------|---|
| a. Create Customized Reports | iii. Add Formulas | vii. Save a Report as Public or Private |
| i. Add Columns and Column Properties | iv. Add Aggregations | b. Create Process-Specific Reports |
| ii. Rebuild a Table | v. Use Charts | c. Schedule Recurring Reports |
| | vi. Filter Controls | |

Appendix: Essentials/Fundamentals Series

Audit Essentials

Recommended audience: SysAdmins, Audit Module Admins, & specialists; core implementation team members; audit team members or IT managers responsible for platform configuration or maintenance.

Description: This course introduces configuration concepts specific to the Audit Module. You'll learn how to configure Audit InfoCard Types, maintain your audit schedule, and perform other Audit-related tasks. This course is offered as a consultant-led course or as a learning path in the self-study library.

Pre-requisites: Welcome to MasterControl, MasterControl Essentials Pre-Work, and Documents Essentials.

Course objectives: In this course, you'll learn how to:

- Leverage MasterControl to prepare for and perform audits
- Configure Audit InfoCard Types
- Create and manage observations
- Complete an audit and prepare reports

Content agenda (we'll provide a detailed agenda with timeframes in advance of class)

1. Audit Module Overview

- | | | |
|-----------------------------|-----------------------------|-------------------------------|
| a. Review the Audit Process | c. Schedule an Audit | e. Add Standards and Criteria |
| b. Plan for an Audit | d. Configure Audit Settings | f. Build a Checklist |

2. InfoCards for Audits

- | | | |
|---|-------------------------------|-----------------------------------|
| a. Configure Audit Module InfoCard Types & Subtypes | c. Open the Audit Workspace | f. Start the Audit |
| b. Create an Audit Entity InfoCard | d. Review the Audit Workspace | g. Answer the Checklist Questions |
| | e. Select Audit Workflows | |

3. Observations

- | | | |
|-----------------------------|--------------------------------|----------------------------------|
| a. Create a New Observation | c. Sort Observations | Appropriate Header |
| b. Edit a Save Observation | d. Move Observations Under the | e. Attached Observation Evidence |

4. Completion & Reporting

- | | | |
|--|---------------------------------|--|
| a. Finish the Audit | g. Reassign Response Tasks | n. Prepare for the Final Review Step |
| b. Create a Draft Report | h. Resend Response Tasks | o. Close Down the Final Review Collaboration |
| c. Review and Sign Off on the Draft Report | i. Track Response Tasks | p. Sign Off Final Audit Approval |
| d. Approve the Draft Report | j. Assign Action Tasks | q. Find Completed Audits |
| e. Generate a Response Task | k. Track Action Tasks | r. Create a Risk Map |
| f. Respond to Assigned Observations | l. Create the Final Report | |
| | m. Sign Off on the Final Report | |

Appendix: Essentials/Fundamentals Series

New Admin Essentials

Recommended audience: SysAdmins, Module Admins, & specialists; document control managers or IT managers with responsibilities for platform configuration or maintenance.

Description: Designed for New Admins from customer sites with an existing configured system. This class covers managing and maintaining a configured system.

Pre-requisites: Welcome to MasterControl, MasterControl Essentials Pre-Work

Course objectives: In this course, you'll learn how to:

- Perform advanced user and system administration
- Troubleshoot user errors
- Change configuration settings
- Establish efficient document practices

Content agenda (we'll provide a detailed agenda with timeframes in advance of class)

1. Introduction & Key Terms

2. System Checks & Balances

a. Daily
b. Weekly

c. Weekly
d. Quarterly

e. Bi-annual

3. User Management

a. Create New Users
b. Where Used & Editing

4. Supporting your End Users

a. Using Links

b. End-User Toolkit review

c. Fixing Common Errors

5. Roles & Rights

a. Roles and Rights Overview

b. Roles & Rights Analytics

6. Configuration Review

a. Create an abbreviated configuration

b. Testing Configuration

c. Documents Configuration Analytics

7. Organizers

a. Taxonomy
b. Virtual Folder

c. Static
d. Combination Organizers

8. User & System Management

a. Disabling Users
b. Tracking

c. System Maintenance Reports & Logs

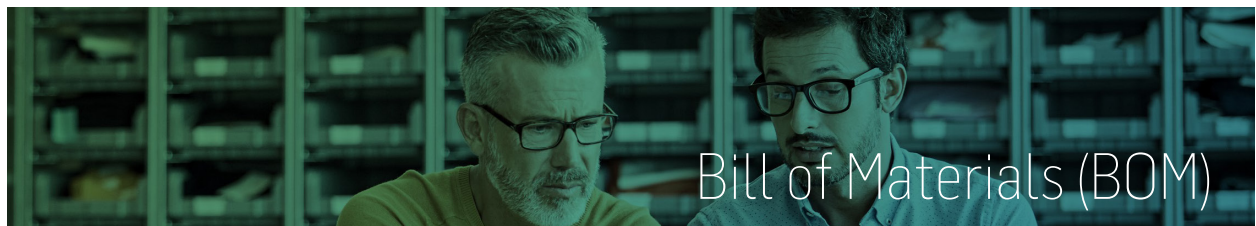
d. Publishing
e. Settings & Help

Appendix: Special Topics



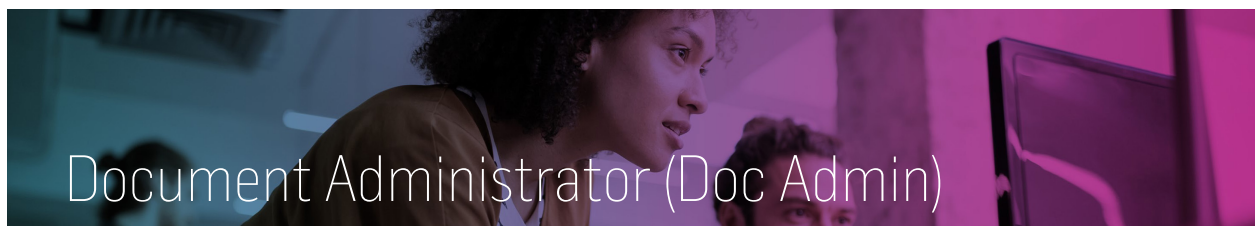
MasterControl Analytics enables users to retrieve and analyze data within MasterControl. With analytics any user with reporting responsibilities can customize and create reports to meet their organization's needs. In addition, any public report can be scheduled to be sent on a regular basis with real time data.

In this course, you'll learn how to customize and create your own reports in MasterControl. You'll learn basic view functions such as filtering, rearranging columns, grouping, and exporting. You'll next learn more advanced interactive view functions such as adding columns, formulas, counts, graphing, and saving reports. You'll review customizing common document, training, and process reports to obtain data such as a Master SOP list, past due review tasks, pending training by supervisor, overall training status, and specific form reports.



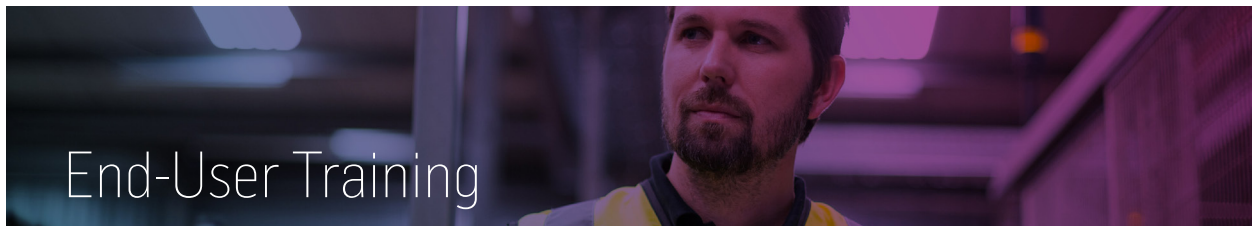
The MasterControl Bill of Materials (BOM) module streamlines the handling of BOMs and helps companies overcome BOM-related issues. The BOM module controls the multiple iterations of a BOM generated during the design process and enables users to exchange BOM data with suppliers. This module works best when Documents & Supplier modules are in place and can also be connected to ERP systems for automatic data pushes.

In this course, you will learn how to configure and use the Bill of Materials (BOM) module. You will review the configuration elements need for BOM including InfoCard types, lifecycles, numbering, custom fields and roles. You'll learn how to create new BOM InfoCards and use the BOM workspace. You'll also learn how to Copy, Import, Export, and review BOM reports.



The role of a Document Administrator in MasterControl is to manage and maintain the documents module. In this role Document Administrators are responsible for troubleshooting and management of InfoCards, Templates, and Organizers. In addition, this role is also responsible for generating relevant Document metrics reports.

In this course you will learn how to manage and maintain the documents module. You will learn how to troubleshoot document tasks, create templates, create organizers, and manage InfoCards. In addition, you will learn how to pull important document metrics from the reporting system.



Level 1: View Only/ View

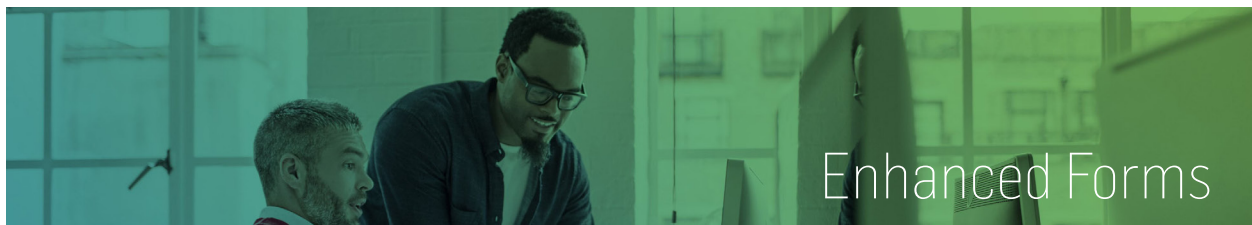
As a view only or view user you'll be responsible for accessing documents as well as completing training tasks. In this course you'll learn the basics about MasterControl and the Documents module so you can perform these functions.

Level 2: All Company

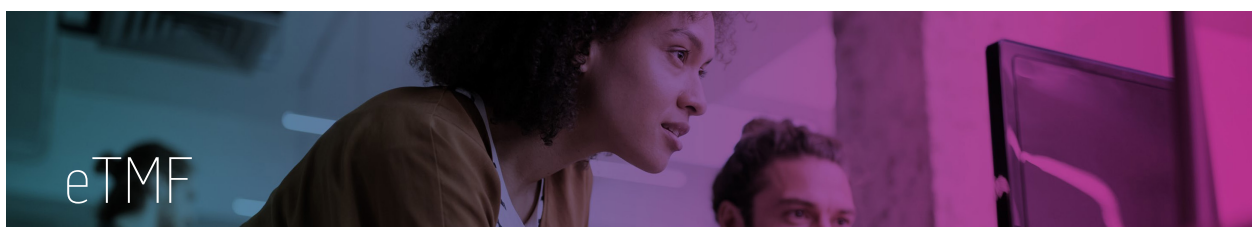
As an All Company or Read user you'll be responsible for accessing documents, collaborating on documents, approving documents, and completing training tasks. In this course you'll learn how to perform these functions and participate in the system as an All Company or Read user.

Level 3: Creator Reviser

Creator Reviser or Create users are primarily responsible for the document creation and revision process. They are also responsible for more basic functions including accessing documents, collaboration, approval, and training task completion. In this course you'll focus on how to create new documents and lead a collaboration. You'll also review how to revise existing documents and basic document task troubleshooting.

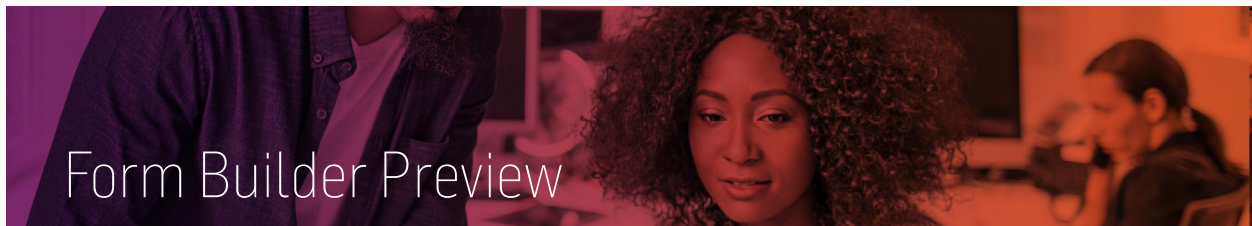


MasterControl Process empowers companies to upgrade their paper-based process management methods with an automated electronic system featuring a graphical workflow designer, electronic tracking, concurrent routing and instant access to all records. In addition to improving internal efficiencies, the system enables compliance with stringent FDA and ISO regulations and standards with its user access security, complete audit trails and electronic signature capabilities. Enhanced forms within the process module allow you to capture data for standard quality events such as Deviation, Management of Change, and CAPA. In this course, you will walk through one specific FBS / Enhanced form from beginning to end.



The MasterControl eTMF Manager is an electronic trial master file management solution designed to enable real-time visibility into the status of all activities pertaining to a clinical study. Based on the TMF Reference Model, the eTMF Manager provides management of all documents, tasks, milestones and activities (such as monitoring visits and audits) required during a clinical trial, while allowing both sponsors and CROs to track the progress of pending, ongoing, and completed actions.

In this course, you'll learn about the MasterControl TMF Reference Model Jumpstart, an out-of-the-box best practice-configured document management system based on the TMF Reference model. you'll also cover how to create new TMF templates and Projects including best practices for template and project management. you'll also review how to export projects and manage project status.



Form Builder Preview

MasterControl Process empowers companies to upgrade their paper-based process management methods with an automated electronic system featuring a graphical workflow designer, electronic tracking, concurrent routing and instant access to all records. In addition to improving internal efficiencies, the system enables compliance with stringent FDA and ISO regulations and standards with its user access security, complete audit trails and electronic signature capabilities. The MasterControl eForm Builder is a solution designed to enable organizations to build their own forms per their business requirements.

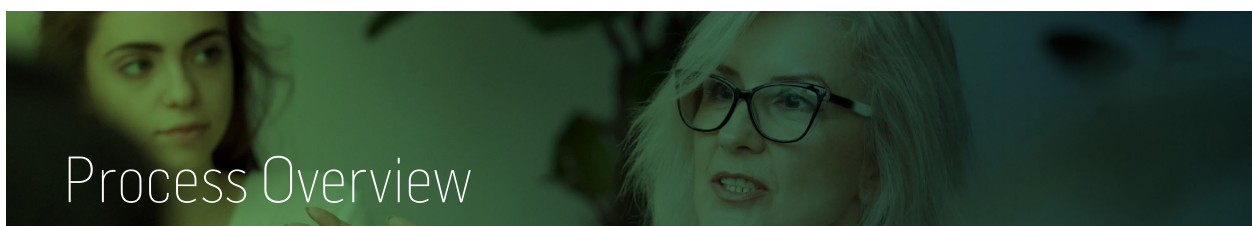
In this course, you'll learn the steps required for creating a new eForm and will use the eForm builder to design and create a custom eForm. you'll also review eForm configuration, workflow creation, and editing of existing eForms.



Insights

MasterControl Premium Insights gives users complete control over their data. Design your own dashboards using a simple drag-and-drop interface to get the answers you need to the specific problems you face. With Insights any user with reporting responsibilities can customize and create dashboards to meet their organization's needs. In addition, any dashboard can be scheduled to be sent on a regular basis with real time data.

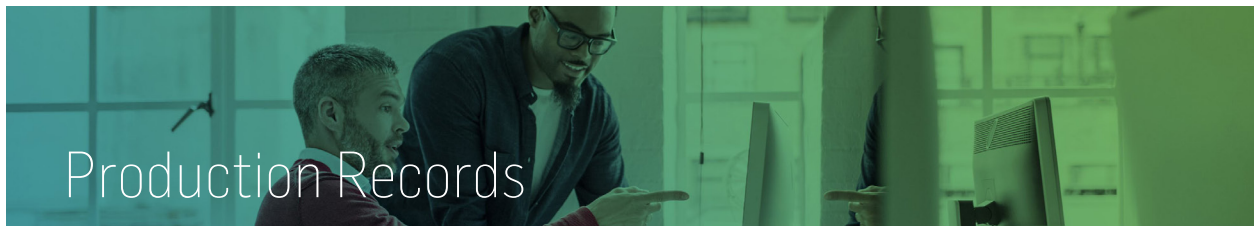
In this course, you'll learn how to navigate existing dashboards and customize and create your own dashboards in MasterControl. You'll learn functions such as dashlet, KPI, table, expression, and visualization creation.



Process Overview

The MasterControl Process Module expedites paper-based business processes by replacing them with electronic ones, which opens the door for electronic tracking, concurrent routing, and instant access to all your records. You can launch processes according to your assigned rights with automated routing to appropriate participants and have the option to escalate tasks if timelines are not met. It also makes it possible for you to concurrently process tasks by multiple users or even groups, which accelerates your turnaround and frees up time and resources.

In this course, you'll learn navigation of the process module and review common form elements. You'll also learn how to search for and manage form records. you'll also review how to create and manage analyzer agents in order to track and trend quality events.



Production Records

MasterControl Production Records is a first-of-its-kind, intelligent-edge application that collects, connects and contextualizes shop floor data and fully digitizes your production records. By seamlessly integrating critical software applications from ERP to MES, LIMS to CRM and more, the solution not only digitizes the paper-based and partially digital processes that persist at the line level, but enables an unprecedented degree of automated data transfer and correlated insights across the entire enterprise. In so doing, MasterControl Manufacturing Excellence serves as the final source of truth for all production data required by current good manufacturing practices (CGMP). The output is a complete, compliant and digital production record in a fraction of the time, at a fraction of the cost, and 100% error-free – every time.

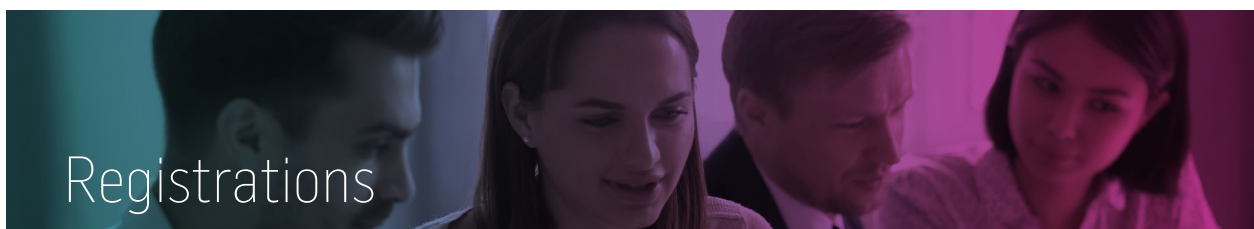
In this course, you'll learn how to review the production records interface and how to create a new production record. You'll also review how to complete specific steps of the production record and how to release a production record. You'll also review the master template builder including best practices for creating a production record template.



Projects

MasterControl Projects automates the process of controlling projects, particularly those that are document and / or process-based. It automates task assignment, routing, escalation, and tracking. It also streamlines the workflow and provides project transparency that fosters accountability.

In this course, you'll learn how to navigate the Projects module, review projects configuration, and complete project tasks. You'll also review how to create new project InfoCards and how to use the project workspace. You'll also learn how to use project templates, import and export project information, and will review project reports.



Registrations

MasterControl's cloud-based Registrations integrates content management with registration and submission capabilities to harmonize regulatory and quality processes, simplify global submissions, and accelerate time to market. You can generate, manage and finalize all content to ensure compliance before outsourcing the submission process to a vendor or exporting your dossier to another system for actual submission. Equip your regulatory and submission personnel with the essential tools for content collection, dossier management, change control and document life cycle management on a single platform. With MasterControl, your organization can comply with confidence.

In this course, you'll learn how the Registrations module works and what configuration is needed for the registrations module based on your business practice. You'll also learn how to create registrations templates and projects. You'll learn how to export a project and manage project status.



Risk

MasterControl Risk helps your organization take a consistent approach to assessing and managing risk. An integrated software solution can help companies identify and mitigate long-term, systemic risks by tracking and analyzing the recurrence of issues.

In this course you'll learn how to navigate and use the risk module. You'll review risk configuration and configure risk assessment types. You'll also fill out risk assessments and learn how to find and store risk related data.



Supplier

MasterControl Supplier helps ensure compliance, a primary concern for regulated companies. The supplier module acts like an electronic filing cabinet to keep the important details of your numerous suppliers organized. In this course learn how to use and configure the supplier module to fit your company needs. In addition, the solution streamlines the qualification, management, and monitoring of the approved vendor list (AVL).

In this course you'll learn how to configure the supplier module and create supplier InfoCards with the appropriate status. You'll also learn how to launch and complete supplier related quality event forms such as Supplier Corrective Action Request (SCAR) and Supplier Scorecard. In addition you'll learn how to manage, maintain, and report on the supplier module.



Upgrade Training

When upgrading from a previous version it's important to know the differences between your current and new version of MasterControl. In this course you will learn about impactful changes between two versions of MasterControl.