Strategies for Training End Users on SOLABS QM10

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Automating Quality Operations

SOLABS' Training Strategy is to train the designated Super Users on administrative functionality. Those Super Users will then be responsible for training their End User Community.

The End User Community will require training on the following functionalities, depending on their roles and as applicable as part of the client rollout:

- Logging into SOLABS QM10

- Home Page navigation

- Searching for documents

- Completing an assigned Training Activity

- Checking training status

- Reviewing or approving a document

- Initiating a Document Control Process or other Process

- Acting on a Process Task

- Creating/modifying documents (if not being centralized to Document Coordinators)

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Training of your End Users can be accomplished in many ways.

You need to determine what is best for your company.

TRAINING

Things to consider in choosing a training strategy:

- ## Your situation

  - Are you moving to SOLABS QM10 from a paper-based system or another software?

- ## Your audience

  - Are they comfortable using computers?

  - Will they have access to computers where they work?

  - How will they be using the system?

- ## Your needs

  - Do you have immediate on-boarding training needs for new employees?

  - Do you need documented training ahead of allowing access to systems?

  - What functionality does every person need to learn?

  - What functionalities will only apply to a smaller group of people?

- ## Your approach

  - Demonstration vs. Hands-On Training – which is best for what?

  - How can you use your SOLABS QM10 Validation Environment?

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Ideas for Training End Users on SOLABS QM10

The following slides will present some approaches used by SOLABS QM10 clients.

Some may work best for initial training on SOLABS QM10 for all end users, while others may work best for new hires in the future.

A combination of approaches may provide the best learning experience for your users!

Initial Introductory Training

Since all End Users will likely need to be trained on confirming a Training Assignment, this can be combined with training on Login and General Navigation. Include your internal training on use of Electronic Signatures too since signing off on their training will require an electronic signature.

Training on these topics can be done by presentation so that users actually see the interface prior to actually logging into their own account.

- Use materials from the SOLABS Knowledge Base – either sending links by email or presenting them in group sessions

- Group sessions could be scheduled as lunch 'n learn to cover these topics

    Consider using this 5.5 minute video from the SOLABS   Knowledge Base title
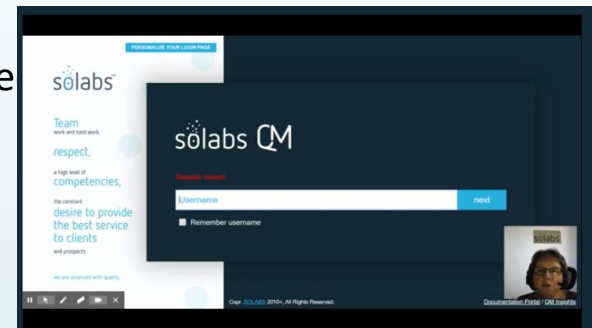
    <u>Other useful Knowledge Base articles</u>:

    SOLABS QM10: Introduction for General Users

    SOLABS QM10 Training Section: Guide for General User

    Guide to the Document Section for General Users

Your SOLABS Product Specialist/Trainer may have PowerPoint presentations on these topics as well.

Onboarding or Employee Orientation Curriculum

Some clients create one or more Curricula for the initial Training Activities that need to occur right away. These Training Activities are then linked to Function Roles created for this purpose, that are assigned to all new users.

- One of these Training Activities could be created to document the presentations described on the previous slide. Using the Record from External Record option, trainers can collect hand-written training attendance sheets and then enter credit for the participants before they ever log into their own account.

- Another of the Training Activities could be to document their understanding of Electronic Signatures.   If you are doing Introductory Training in a classroom setting, guide the trainees through that content and then through using their electronic signature to sign off on it!

Once users have been trained on accessing a training assignment and signing off on it electronically, you can consider additional assignments for any basic onboarding training you may have – safety training, good documentation practices, overviews of the company and products, etc.

Hands-On Training for the Document Section

Your SOLABS QM10 Validation Environment can be used
for   hands-on training for such things as searching for
documents,   creating documents, review and approval of documents.

- Create a special folder in the Document Treeview of the VAL environment that will be used during training sessions.   Create a Document Type that has that folder as a default location. Give Modify permissions to this folder to all of your users as they are added to that environment.

- In a classroom setting, guide trainees through creating a dummy document within that folder.   Walk them through how to send the document for review and approval – perhaps send to the person on their left as a Reviewer and the person on their right as an Approver. The trainer can walk around the room assisting as needed while everyone has a chance to create a document, review a document and approve a document.   Consider then guiding them through revising the document and routing it again for review and approval.

- After the class, these documents can be retired or reused for training on document revisions.

Self-Paced Training in the Validation Environment

Your SOLABS QM10 Validation Environment can also be used for self-paced training on searching for documents, reviewing documents and approving of documents.

- Create a special folder in the Document Treeview of the VAL environment that will include documents used for training. Give Review/Approve permissions to this folder to all of your users as they are added to that environment.

- As you add users to the VAL environment, set them as a reviewer and/or approver of documents within this folder.

- Send the URL to the VAL environment and instructions for logging in. The new users will see their review/approval tasks on their Home Page. If you put yourself as a Level 2 approver, you will know when they are complete because you will get a notification.

You can also create and assign self-paced Training Activities or Tasks within the VAL environment if you'd like.

Remember to also create associated Training Activities in the Production Environment so that you can apply credit for your users for having completed any training they performed in the VAL environment.

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Other Training Topics

Using hands-on classroom sessions or online training, consider the following additional training topics:

- Use the TASK Section to create and assign a task to search for a specific document. Include any instructions within the task. After marking the task as Complete, ask the trainee to use the Link Documents option on the right-hand menu to link the retrieved document.

- If you have users who need to learn how to initiate a Process, provide instructions on Step 1 of the process and ask them to assign it to you for Step 2.

- In a classroom setting, you could run through a process with a group of users, each being assigned a step in the process and sharing their screen when they get to their step. Be sure to assign the appropriate Process Roles to make this work.

BEFORE Providing Access to the Production Environment

As a Super User, you will grant access   to the Production Environment for End Users   by changing their Login Type from Database to SOLABS Identity or your SSO option.

- This will trigger an automated email with the URL to the environment and instructions for setting up their password in Password Manager.

- Send the Password Management guide the day before changing their Login Type and alert them of the email they will receive. If you have planned classroom training to walk them through the password setup process, inform them that it will be covered during their scheduled training session so that they can just save the email until then.

  You can find the Password Management guide in the SOLABS Knowledge Base

  Password Self-Service for SOLABS Identity Users on Version 10.8

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Do you have any additional End User Training Approaches you would like to share with us?

We would like to include your successful approaches, either for the initial rollout of SOLABS QM10 to your entire site or for training of new hires as they join the company.

If so, please contact Gretchen Dixson or Etienne Langlois – we'd love to hear from you and make our End User Training Strategies more complete!

Thanks!

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