

For new PROMS users we recommend Basic Training which introduces the student to the PROMS environment and covers in more detail basic editing and maintenance of procedures. For current PROMS users we cover the same topics as Basic Training but present the materials as a refresher course. The PROMS Administrator Training covers PROMS Functionality that only PROMS Administer Users can use.

Basic PROMS Training

Session One (3-4 hrs)

PROMS Overview

- Description and design of PROMS
- Introduction to the PROMS Dashboard
- The Help menu options
 - User Manual
 - Error Reporting
- The V Button
 - Most Recently Used List
 - PROMS User Options (user settings)

Editing Procedures

- Selecting Procedures to Edit
 - From the tree
 - From Most Recently use
- Procedure, and Section Property Pages
 - Overview of procedure and section formats
 - Changing Procedure and Section Numbers
 - Changing Procedure and Section Titles
- Editing tools
 - Ribbon Buttons
 - Context Menu (right mouse click)
 - keyboard shortcuts
- Using the various step types
 - Steps and Sub Steps
 - Notes and Cautions
 - Tables
 - Figures
 - Equations
- Step Designator
- Checkoffs/Signoffs
- Transition Links
 - Within the procedure
 - To a procedure in the same procedure set
 - To a procedure outside the current procedure set

Session One (cont.)

- Referenced Objects Links
 - Overview. What are Referenced Object?
 - Linking RO's in the procedure text (how to find proper RO value)
 - Discussion on how RO values are updated (only PROMS Administrator)
 - Discussion on how RO values are changed
- Procedure Editor Sections vs MS Word Sections

Annotations

- Types of Annotations
- Adding, Modifying, deleting Annotations
- Automatically Generated Annotations

Questions / Review / Discussions

Basic PROMS Training (cont.)

Session Two (3-4 hrs)

Finish any topics not covered in session one

- Questions from previous session
- If requested, review topics from previous session

Change Manager

- Change bars
- Change History
- Restore changed text
- Restore deleted text, sections, procedures

Library Documents

- Description and Uses
- Creating, Modifying, Saving
- Generate from existing Word Document
- Linking and Un-linking to a Word Section

Printing Procedures

- From the Procedure Tree
- From the Ribbon
- Single Procedures
- All Procedures
- Print dialog options
 - Default Print Settings

Procedure Tree

- Procedure, and Section Property Pages
- Adding Procedures, and Sections
- Moving Procedures, and Sections
- Deleting Procedures, and Sections

Questions / Review / Discussions

Basic PROMS Training (cont.)

Session Three (3-4 hrs)

Finish any topics not covered in session two

- Questions from previous sessions
- If requested, review topics from previous sessions

Search Function

- Searching for text, Annotations, Referenced Objects, and Transitions
- Search Options
 - Case Sensitive
 - Whole Word
 - Within Selected Step Types
 - Include Linked Text
- Printing Search Results
- Opening procedures from Search Results
- Saving/restoring Search Results
- Export Search Results to Excel

Reports

- Referenced Objects (Usage, Summary, and Complete Reports)
- Library Documents
- Similar Steps
- Transition Usage

Editing Different Types of Procedures

- Single Column Procedures
- Two Column Procedures
- Backgrounds
- Deviations
- SAMGs
- Flex Procedures

Approval Function

- Work Flow Stages (Approval vs Work Flow Stage)
- Creating / removing Work Flow Stages (PROMS Administrator function)
- Effect on Change Bars and Change History
- Summary of Changes
- Procedure Dependencies (Transitions and RO usages)
- Viewing Procedure Workflow and Approved versions
- Exporting an Approved Procedure
 - Temporary Mods between procedure upgrades

Questions / Review / Discussions

PROMS Administrative Training (3-4 hrs)

Procedure Tree

- Adding Folders and Procedure Sets
- Folder and Procedure Set Property Pages
- Moving Folders and Procedures Sets
- Deleting Folders and Procedure Sets
- Setting Defaults
 - Print defaults
 - Annotation Types
 - Approval/Workflow Stages

PROMS Security

- Add / Assign PROMS User Accessibility
- Set up Default PROMS User Associability

Import/Export

- Single Procedures
- Procedure Sets
- Approved Procedures

Administrative Functions

- Updating Formats
- Set Up and Maintain PROMS Security (user accessibility)
- Multi User functions
- Administrative Tools
 - Database Record Checking/Repair tools
 - Update Referenced Object Values in multiple procedure sets
 - Batch Processing (setting to run overnight)

Referenced Objects Editor (basic RO Editor)

- Overview of the RO Editor Interface
- Editing RO return values
- RO.FST generation and updating RO values in Procedures

Understanding of PROMS Installation (IT topics)

- PROMS Releases (what's included)
- Installation Options
- Installing PROMS Fonts
- Updating the database with PROMSFixes.SQL (need DBA support)

Questions / Review / Discussions

Referenced Object Editor (3-4 hrs)

Referenced Objects Editor

- Overview of the RO Editor Interface
- Organizing the RO data
- RO Groups
 - Sub-Groups
 - Properties
- Setting RO Fields
 - Creating New RO fields
- Setting Accessory Page ID's (for use in PROMS Word sections)
- Defining Return values
 - Multiple Return Values
 - Defining and Using a Variable
 - X/Y Plots (Plot definition language)
 - Images (JPG, BIT, TIFF files)
 - Tables
- Define Menu Values
- Editing existing, Creating new ROs
 - Return values
 - Long and short descriptions
 - Basis information
- RO.FST generation
 - Updating RO values in Procedures (PROMS Administrator function)
- Referenced Objects Reports (performed from PROMS)
 - Usage Report
 - Summary (Short Description) Report
 - Complete RO Report
- Different Uses for Referenced Objects
 - Setpoints
 - Alarm Points
 - Equipment
 - Standardized Text

Questions / Review / Discussions