

Compliance Convergence

Qualtrax User Conference

May 18-19, 2010

The Inn at Virginia Tech and Skelton Conference Center in Blacksburg, VA

Additional User Training

May 20-21, 2010

Qualtrax Headquarters in Christiansburg, VA

Tuesday, May 18

7:30 AM – 8:00 AM

Registration & Continental Breakfast

8:00 AM – 8:30 AM

Welcome & Introductions

8:30 AM – 9:30 AM

Ice Breaker & Kick-off

9:30 AM – 10:30 AM

What's New & Product Roadmap

Steve Miko, Vice President

This year's conference kicks off with an update on the many new features found in V4.1 and V4.2. You will also learn what the Qualtrax team has planned for future releases. As always, many of the new features come from our users. We look forward to sharing with you when these will be available.

10:30 AM – 10:45 AM

Break

10:45 AM – 12:00 PM

Customer Presentations

Learn how other customers use Qualtrax. Each customer will present for approximately 30 minutes with additional time for Q&A.

Robyn Ruth, Technology Support

BORIDE Engineered Abrasives



Conquering Internal and External Audits

How much time do you pour into audit preparation? Come learn how BORIDE Engineered Abrasives adjusted its own practices to pass the company's toughest ISO audit yet. Topics will include handling of Management Review, tree structure permissions, and associating the ISO standard with workflows. Join in the discussion as we discuss best practices for using Qualtrax to help prepare for audits. Robyn will also share how BORIDE plans to expand the Qualtrax system in the future to help with LEAN and 5S programs.

* Denotes a session that is offered twice during the conference.

Josh Grauso, Quality Program Manager & Lead Auditor
STR-Registrar, LLC



Automating Processes with Qualtrax

STR will share how it utilizes Qualtrax to manage documentation, records, and audits across its global auditing team. Josh Grauso will demonstrate how Qualtrax workflows enabled the company to automate its auditing and corrective action tracking processes. Come learn how a series of workflows has resulted in significant time-savings. Josh will also share how STR plans to use Mobiltrax to assist with mobile auditing in the future.

12:00 PM – 1:00 PM

Lunch

1:00 PM – 2:15 PM (Concurrent sessions - Choose one.)

New WYSIWYG Workflow Wizard*

Kathleen Ryland, Implementation Manager

Turning your paper-based processes into electronic workflows has never been easier. Watch as our team walks you through the new WYSIWYG workflow wizard. Begin designing workflows from the chart up! We've developed a way for you to design your workflow as a visual flowchart, and then let Qualtrax convert your process into a workflow. It's really that simple!

New Training Management Feature*

Ken Vaughan, Trainer/Technical Writer

Learn how your organization will be able to manage department and individual training and testing using the new training matrix. Watch as a team member walks you through some of V4.2's newest training and testing features and gives insight to how Qualtrax can ease the strain of managing your internal training and testing records.

2:15PM – 2:30 PM

Break

2:30 PM – 3:45 PM

Tips, Tricks & Best Practices

Ken Vaughan, Trainer/Technical Writer

This session is back by popular demand. Come learn the latest timesaving shortcuts and support tips from our development and support team! Come prepared to interact with other users. This is a great time to share tips and tricks that you've found useful in your daily use of Qualtrax.

3:45 PM – 4:00 PM

Break

4:00 PM – 5:00 PM

New Mobile Auditing Feature

Deanna Felton, Project Manager
Tim Allen, Software Engineer

Learn how the Audit Module within Qualtrax allows organizations to perform mobile handheld audits. The Audit Module provides management a way to easily manage internal audits, standardize audit questions and answers, view and share audit reports, and initiate failure reports.

6:00 PM

Cocktail Reception:

Join the Qualtrax team for drinks and hors d'oeuvres at Awful Arthur's Seafood Company.

* Denotes a session that is offered twice during the conference.

Wednesday, May 19

7:45 AM – 8:00 AM

Continental Breakfast

8:00 AM – 8:30 AM

Day 2 Kick-off

8:30 AM – 10:30 AM

Your product, Your way! Brainstorming Session on New Features

This session is designed to gather your input on new features for future releases. We will have demonstrations of future functionality and break out into groups to discuss enhancements to these new product ideas. You will also have the opportunity to suggest features that may be of interest outside of these areas. This is one you don't want to miss!

Key areas to be discussed:

- SharePoint integration led by Derek Pinkerton
- Workflow Library led by Chuck Sailors
- Reporting led by Keith Williams
- Auditing led by Mark Duncan & Tim Allen

10:30 AM – 10:45 AM

Break

10:45 AM – 12:00 PM (Concurrent sessions - Choose one.)

New WYSIWYG Workflow Wizard*
Ken Vaughan, Trainer/Technical Writer

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Migration: From V3.8 to V4.X & Beyond!
Derek Pinkerton, Lead Software Engineer

If you haven't had the opportunity to migrate to V4.X, then this session is for you. Come dialog with our Qualtrax team as they share some pointers for best practices in migration, tips & tricks, and general support. Our product is continually improving and we want to see you get up to speed so you too can benefit from all it has to offer your organization.

12:00 PM – 1:00 PM

Lunch

1:00 PM – 2:15 PM

Customer Presentations

Learn how other customers use Qualtrax. Each customer will present for approximately 30 minutes with additional time for Q&A.

Chris Curtis, Senior Analyst, IT Services
Kimberly-Clark



Expanding Qualtrax Across Your Organization

Come learn how Qualtrax workflows have transformed processes for Kimberly-Clark. Chris Curtis will explain how he worked with his HR and Operations departments to improve the company's labor intensive performance evaluation process. Qualtrax workflows enabled Chris to reduce this process from 10 hours per employee down to two hours per employee. This workflow saved the company approximately \$50,000 in just the first year of use! Chris will outline the original process and how he transformed all the paper pushing into a series of three workflows.

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Carola Bousserghine, Quality Assurance Manager & Qualtrax Document Software Specialist
Polymer Solutions, Inc.



Compliance with ISO 17025 & FDA Requirements

Polymer Solutions will share how the company utilizes Qualtrax to help the laboratory maintain ISO 17025 accreditation, as well as meet GMP requirements for the FDA as it pertains to laboratory testing. The management of employee training is an important element of how Polymer Solutions uses the Qualtrax system. Carola will demonstrate how the organization uses a training workflow to document employee training and certifications. She will also share document control best practices and how they have automated capturing data for Deviations, Out of Specification (OOS) Investigations, and CAPA's through workflows.

2:15 PM – 3:30 PM (Concurrent sessions - Choose one.)

Reporting – Version 4.X

Kathleen Ryland, Implementation Manager

Learn how to use standard reports and see step-by-step examples of how to create your own reports in V4.X.

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Ken Vaughan, Trainer/Technical Writer

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3:30 PM – 4:45 PM (Concurrent sessions - Choose one.)

New Custom Scripts

Chris Bateson, Support Technician

Over the years, Qualtrax has created a variety of complimentary custom scripts for users. During this session we will review some of the more popular scripts that could possibly help your organization. The new script library will be made available to all attendees. Come learn how you can add new functionality to your system!

Introduction to Mobiltrax

Deanna Felton, Project Manager
Tim Allen, Software Engineer

Learn how Mobiltrax enables organizations to perform mobile handheld audits and collect real-time data on CCPs and other key quality indicators. Many industries struggle to manage accurate daily data collection from increasing regulation. Mobiltrax allows management to easily manage internal audits, view key data and identify deviations instantly via a scorecard.

4:45 PM – 5:00 PM

Wrap-up

* Denotes a session that is offered twice during the conference.

Thursday, May 20 & Friday, May 21

For the first time as part of the User Conference, we are offering two days of additional training at a minimal cost to conference attendees. Each full-day session will run from approximately 8:30am-5:00pm and will include lunch. Both sessions will run concurrently on Thursday and Friday so that attendees wishing to participate in only one session can complete their training on Thursday. Attendees interested in both sessions should plan to stay through Friday.

8:30 AM – 5:00 PM (Lunch Included)

Differences Between V3.8 & V4.X

Ken Vaughan, Trainer/Technical Writer

This session is designed for users who have either not yet migrated to V4.X or have recently migrated to V4.X. Key areas to be covered during this session:

- Navigation
- My Qualtrax
- Document Control (for the process of creating, editing, and maintaining folders and documents)
- Add On Modules and Tools (for the changes associated with Automatic File Transfer, Mass Import, Doc Compare, etc)
- Security
- Workflows
- Reporting

8:30 AM – 5:00 PM (Lunch Included)

Workflow Workshop

Kathleen Ryland, Implementation Manager

This session is designed for users to leave with a new workflow ready to implement for their organization. Bring a current paper-based process and learn how to set this up as a workflow. During this session you will also learn how to use the Workflow Library and take advantage of workflows that your fellow users have developed. Participants will receive a workflow workbook as part of this class.

----- *For maximum benefit, please come prepared with a process you would like to automate.* -----

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