European Translational Information and Knowledge Management Services

eTRIKS Deliverable report

Grant agreement no. 115446

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# DELIVERABLE INFORMATION

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<td>Project full title:</td>
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<tr>
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<tr>
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<td>Deliverable version:</td>
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<td>30 September 2017</td>
</tr>
<tr>
<td>Leader:</td>
<td>Gino Marchetti</td>
</tr>
<tr>
<td>Editors:</td>
<td>Chris Marshall</td>
</tr>
<tr>
<td>Authors:</td>
<td>Gino Marchetti, Nathalie Jullian</td>
</tr>
<tr>
<td>Reviewers:</td>
<td>Chris Marshall</td>
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<td>Community Engagement and Outreach</td>
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<tr>
<td>Work Package leader:</td>
<td>Scott Wagers, Francisco Bonachela Capdevila</td>
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1. Executive Summary

eTRIKS Work Package 6 is tasked with coordinating and delivering training to users of the eTRIKS Knowledge Management Platform. It is recognised that training needs go beyond use of the Knowledge Platform and include data curation, data privacy, standards and tranSMART system administrator.

Training is provided either on public data sets or on aspects specific to a project, using the project’s own data. We have found that the additional effort required to prepare and deliver project-specific training is rewarded in better engagement of trainees and higher overall assessment of the value of the training.

During the period of the project 34 training sessions have been run on 6 different topics to a total of 444 attendees. The overall satisfaction with the training provided by eTRIKS, as measured by participant feedback is good to excellent.

Public training materials are made available through the eTRIKS web site.

2. Introduction

2.1. Background and Scope

eTRIKS is a knowledge management and service infrastructure project aimed at development of a software and hardware system capable of the efficient storage and effective analysis of experimental data from studies in man, in animals and in pre-clinical models, maximizing the scientific knowledge that can be extracted from such studies.

The project’s primary goal is to deliver a knowledge management system for ongoing and future IMI studies that require correlative analysis of both pre-clinical and clinical genome-scale biomarker data (genetics and genomics platforms) in conjunction with medical data from clinical trials. This open-source system will also be available for use outside of projects sponsored by IMI.

2.2. Training and Work packages duties

Most work packages (WP1, WP3, WP4, WP6 and WP7) have been involved in the training efforts. The training coordination is under WP6 responsibility.

In order to achieve their objectives, the work package duties related to training are described in the project DoW:

WP1 will develop support framework and service model for distributed instances of the eTRIKS platform. This includes capability for installation and qualification of instances, administrator training and second tier support;

WP3 will provide support and training for the implementation of standards across the work packages;

WP4 will provide scientific support for eTRIKS users on the use of curation and analytics features of the system through developing training materials and building reusable workflows;
**WP6** will build an active user and development community to enable the continuous development and use of the platform. The project will develop *activities specifically devoted to training and education* for use of the platform;

**WP7** will *conduct training programs* to ensure that users of the system are aware of their ethical and legal requirements and responsibilities prior to granting access to the eTRIKS platform.

### 2.3. Objectives

The main objective of WP6 training activities is to provide training on the use of the eTRIKS platform and services to all project partners (IMI and non-IMI projects). The training plan provides a general guide for training in both data management and data analysis. The key objectives of the training services are:

- To build an active community of experienced eTRIKS users.
- To enforce the eTRIKS engagement process of users through a well-organized training program.
- To provide quality didactic training courses that meet user needs.
- To provide materials (hands-on, case studies,...) that support user training.
- To periodically update/review the training materials.

This document describes the activities devoted to training and education for users of the eTRIKS platform and services.

### 2.4. Tasks, Milestones and Deliverables

Specific tasks, milestones and deliverables related to training are assigned to each work package and are listed below as they are described in the original DoW document.

**List of tasks related to training (as per WP)**

**T3.1.7** – Provide education services and training; organize annual standards meetings (together with WP6).

**T4.2.1** – Implement the ETL and curation process and training the curators in: define study/data to be loaded, copy and converting data into a common format, applying common lexicons, vocabulary and ontologies (see Appendix E, DoW).

**T4.6.2** – Provisioning of training material and training sessions for eTRIKS curation and analytics.

**T6.2.6** – Arrange Training with Training Coordinator: Facilitate with a project, the engagement of the eTRIKS Training coordinator. Decide on which type of training will be required to support a project and then agree a plan on how to provide that training.

**T6.4** – Coordinate scientific end user training: Design, Implement and Coordinate a scientific training service that will provide end user training to ensure that scientists for a projects get the most value from eTRIKS thereby magnify support of eTRIKS as a platform.

**T6.4.1** – Develop training curriculum: Develop and implement the materials for training users including courseware and exercises. Train trainers to provide this training,
T6.4.2 – Hold training sessions (48 in total): Deliver training to scientists from supported projects either in a classroom or via virtual meeting technology.

T7.4.2 – Develop a process and training programme with training material to ensure all users know all the legal, ethical and scientific approvals they must obtain before gaining access to the data, and that are incorporated into the eTRIKS platform.

List of milestones and deliverables related to training (as per WP)

M3.2: First training taken place with the eTRIKS curation team (WP4)
- Due date: month +3
- Status: Completed

D3.3: Training program/material for outreach and WP4, WP2 for ETL curation using standards
- Form: Report (R)
- Due date: month +6
- Status: Completed

M4.6: Delivery of eTRIKS analytics ecosystem release with eTRIKS v3 & technical and training documentation; Implemented model for data Provenance, business rules and security model
- Due date: month +30
- Verification: Code release and product
- Status: Completed

M6.3: Training curriculum first draft – curriculum and learning materials
- Due date: month +4
- Verification: Draft available
- Status: Completed

M6.6: First training session – report on attendees and feedback
- Due date: month +9
- Verification: Attendance list
- Status: Completed

M7.4: Ethics training programme established with first cohort of users trained
- Due date: month +18
- Verification: available on collaborative platform
- Status: Completed

2.5. Training coordination

The coordination of the training is under WP6. The table below lists the project members in charge of the coordination of the eTRIKS training initiative.

<table>
<thead>
<tr>
<th>Time period</th>
<th>Training coordinator</th>
<th>Contact</th>
</tr>
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<tr>
<td>&lt; Aug 2013</td>
<td>Yonny CARDENAS</td>
<td></td>
</tr>
<tr>
<td>Sept 2013 – Dec 2013</td>
<td>Nathalie JULLIAN</td>
<td></td>
</tr>
<tr>
<td>&gt; Jan 2014</td>
<td>Gino MARCHETTI</td>
<td><a href="mailto:marchett@cc.in2p3.fr">marchett@cc.in2p3.fr</a></td>
</tr>
</tbody>
</table>

*imi* innovative medicines initiative  
*efpia*
3. Instructional methods

3.1. Methodology

Methodology was adapted for the followings types of educational process:

- **Collective training**
  - classroom - organized in a venue of one of the three academics partners (CC-IN2P3, Lyon; University of Luxembourg, Esch-sur-Alzette; Imperial College, London)
  - workshop - organized around a conference or satellite meetings

- **Individual training and Self-learning**
  - virtual meeting technology
  - video and regular Webinars
  - training blog system

- **Customized training**
  - classroom - dedicated to a pharmaceutical company
  - classroom - dedicated to a specific project

The program supports different formats for the training sessions. Also it aims at facilitating discussions on topics and potential issues emerging around the development, deployment and use of eTRIKS applications in the broad context of translational research informatics.

The training organization is flexible allowing program customization in order to address specific requirements of a particular company or project (third option). When possible within time or access limitations, training sessions were provided based on the project proprietary data.

3.2. Evaluation

An evaluation process was implemented to assess how training has influenced the participants and how that impact translates into results for the eTRIKS project.

Feedback was generally collected through electronic survey for a quantitative evaluation (see for example the survey form in appendix A.1), while at the same time quality was assessed adding to the training attendance selected members of other work packages and/or the training coordinator.

The use of the proposed feedback form was left to the instructors' discretion. In the case of the training sessions specifically held for projects the feedback results are restricted to the project itself.

Evaluation results would affect training material updates and/or improvements.
4. Training Facilities & Resources

4.1. Training centre

The educational process is supported by a virtual training centre, i.e. a delocalized organization established with dedicated manpower across eTRIKS partners. Its function is to create and distribute the training materials, organize and deliver training courses in collaboration with the supported projects account managers. This expert network provided useful exchanges between instructors reducing the steepness in the new instructors’ learning curve, and allowing more standardized training sessions.

4.2. Instructors

At the early stages of the project, a small panel of instructors was recruited among eTRIKS project scientists. As the project moved forward, more instructors were recruited and trained so that they could provide training to other scientists and satisfy the project needs. The process mostly ran on a voluntary basis, with the candidate instructor following one or more trainings and keeping in contact with the “experienced” instructors for follow-ups. In the last 18 months of the project, this has included liaison with partner organisations in the eTRIKS Network.

4.3. Technological resources

Training material is available as PDF files, videos and regular Webinars through the dedicated website (www.etriks.org). Since often trainings were prepared using proprietary data from the requesting project, access to some material may be restricted.

4.4. Schedules

The project organises training courses on an as needs basis starting from the second year of the eTRIKS project.

- First training session: January 2013
- Last training session: May 2017

For each training course, the following dates were provided through the usual communication channels (newsletter, mailing-list, website,…):

- Date of training course
- Venue
- Deadline date for application
- Attendance limit (when necessary)
5. Audience

The training program is addressed to all eTRIKS project partners. The audience can be classified by the following categories, allowing determination of the type of specific training to be offered.

5.1. Platform and Service Administrators

Administrators for distributed instances of the eTRIKS platform. After the training, attendees should be able to install, maintain and administrate the platform infrastructure and the software tools.

5.2. Data Curators / Managers

Scientists in charge of the project data curation/management. This audience is expected to learn how to curate data (i.e: transform it in the appropriate standard and label it following the project mandated standards) and to load it into the system for further analysis.

5.3. End-Users (Data analysts)

All scientists interested in using the data available via the eTRIKS platform (data analysts, bio-informaticians, biologists, clinicians…). Trainings dedicated to this audience will focus on the analysis tools, reproducing test cases and answering the most frequently asked questions on the tool handling.

5.4. General eTRIKS members

Any user as defined above. Cross-specialization training was delivered to provide education to all consortium members. These training sessions could interest project members that are:

1. expected to be in charge of the above trainings;
2. expected to know the legal implication of data handling;
3. expected to collaborate in the project support, or actively participate in bug reporting.

User education for project members falling in category 1. is already described in paragraph 3.2. Trainings dedicated to categories 2. and 3. are detailed in the following chapter (paragraph 6.4).
6. Training Curriculum

The eTRIKS training courses can be divided into four major topics according to the target audience:

- **Platform administration:** software installation, platform maintenance (transition training to plan for major upgrades), platform deployment (local or through CC-IN2P3 hosting facilities).
- **Data management:** data standards, ETL procedures.
- **Data analysis:** apply implemented standard workflows, report analysis results.
- **eTRIKS user education:** data handling and protection; how to use the bug tracking system.

6.1. Platform administration

Due to the nature of the subject, a One to One tutoring through email exchange, calls and/or visits, was preferred to the standard training formula (Webinars and/or Face to Face classes). Most of the organization was left to the concerned individuals and due to high specificity of the trainings, no shareable material is available. For traceability reason, only the Face to Face visits are recorded in this document (appendix B.1).

**Infrastructure trainings:** Trainings on this subject were delivered by eTRIKS platform system administrators (WP1) to their counterparts on supported projects or other eTRIKS installations.

- Deployment and operation of infrastructure services
  - Openstack cloud platform
  - PostgreSQL Databases
  - Authorization and Authentication (LDAP)
  - Webservers and proxies

**Software installation trainings:** Trainings on this subject were delivered by software developers (WP2 / WP6) to eTRIKS platform system administrators.

- Deployment and operation of business services
  - tranSMART
  - Galaxy
  - eTRIKS Labs tools

6.2. Data management

**Standard trainings:** Trainings on this subject were delivered at the beginning of the project (January-February 2013) by CDISC as a Webinar and a Face to Face seminar hosted by Sanofi in Paris.

- **Webinar:** Implementation of standards
  - The value of standards
  - Clinical information flow
  - The CDISC standards explained

- **Seminar – part 1:** Introduction to Operational Data Model (ODM)
  - Overview of ODM components
  - Data interchange process
  - Use cases

- **Seminar – part 2:** Introduction to Biomedical Research Integrated Group (BRIDG)
Further trainings are available in arrangement with CDISC, but are not recorded in this document.

**Curation trainings:** Trainings on this subject were delivered as Face to Face classes hosted in University of Luxembourg (Esch-sur-Alzette) and CC-IN2P3 (Lyon).
- Introduction and exercise on the data curation and upload (ETL) process
  - Installation of ETL environment (Kettle scripts)
  - Mapping files creation and file formats
  - Standard labelling and tranSMART tree structure design
  - Upload workflow

### 6.3. Data analysis

Trainings on this subject were delivered as Webinars or Face to Face classes hosted in various venues depending on the attendees’ needs. FtF classes provided hands-on exercises and, on dedicated trainings for supported projects, proprietary data was loaded on tranSMART.
- TranSMART Basic Training
  - Conducting a tranSMART Search
  - Project study structure
  - Data types
  - Basic use of Dataset Explorer
    - Cohort selection
    - Summary Statistics
    - Grid View
    - Data export
  - Advanced analysis workflows
    - Scatter Plot with Linear Regression
    - Marker selection
    - Survival Analysis
    - ANOVA Box Plot
    - Correlation Analysis
- TranSMART Advanced Training
  - Remove Parts of a Search String
  - Create a Gene Signature
  - Search for Studies Using a New Gene Signature as a Filter
  - Use a Heat Map to Compare Treatment Results
  - Analyze Gene Expression Data from Different Perspectives

### 6.4. User education

Trainings on this subject were delivered as Webinars.

**Bug report ticketing system use:** Training on this subject was delivered as a Webinar in November 2013 and in the following years, information was provided through One to One tutoring (not recorded in this document).
- eTRIKS Ticket Reporting System (eTRS) user:
- Access to the ticketing platform
- Submit a request or a Bug report
- Provide feedback to the expert

- eTRS Agent:
  - Ticket “life-cycle” and treatment
  - Best practice suggestions
  - Overview of the Agent platform tools

Ethics and Legal Service: Trainings on this subject were delivered as Webinars. The sessions were recorded to allow new project members easy access to the information, thus avoiding repetition when the material does not undergo major updates.

- Data protection & security
  - Privacy
  - Data re-use
  - Anonymization

- Data handling use cases

6.5. Training feedback results

As of June 2017, a total of 34 training sessions have been delivered. The table below lists the training attendance relative to the training type and the attendees’ project membership. For further details, Table B1 in the appendix shows the detailed training chronology.

<table>
<thead>
<tr>
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<th>eTRIKS community</th>
<th>IMI project scientists</th>
<th>Bioaster scientists</th>
<th>OncoTrack scientists</th>
<th>UBioPred scientists</th>
<th>RA-MAP scientists</th>
<th>Abirisk scientists</th>
<th>COPDmap users</th>
<th>Translational researchers</th>
<th>Grand Total</th>
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<td>-</td>
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<td>-</td>
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<td>-</td>
<td>13</td>
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<td>20</td>
<td>12</td>
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<td><strong>21</strong></td>
<td><strong>12</strong></td>
<td><strong>86</strong></td>
<td><strong>106</strong></td>
<td><strong>45</strong></td>
<td><strong>20</strong></td>
<td><strong>12</strong></td>
<td><strong>10</strong></td>
<td><strong>444</strong></td>
</tr>
</tbody>
</table>

Estimating that less than 25% of the attendees participated to more than one training, it can be declared that the training program helped to inform and share the knowledge gathered in the eTRIKS project with more than 300 translational medicine scientists.

As explained in paragraph 2.2, feedback from the attendees was collected leaving to the instructors complete freedom in choosing the method to gather the information (whether by electronic survey, e-mail, private interview,…). Furthermore, for trainings specifically held for projects the feedback results were restricted to the project itself.

For the reasons above, and in order to have normalized information, only the results gathered through the survey form equivalent to the one shown in appendix A.1 were considered for the following
This choice limited the training types that could be analysed to three categories: data protection, data analysis and curation.

Here below, to summarize the results and give an overview on the training appreciation, only the overall rating of each training type is shown. To have the complete statistics as well as the surveys' numerical details, we will refer to appendixes A.2, A.3 and A.4.

**Data protection overall rating**

- Excellent: 22.22%
- Good: 77.78%
- Average: 0.0%
- Poor: 0.0%
- Very poor: 0.0%

**Data analysis overall rating**

- Excellent: 38.46%
- Good: 46.16%
- Average: 15.38%
- Poor: 0.0%
- Very poor: 0.0%
Curation overall rating

- Excellent: 73.33%
- Good: 26.67%
- Average: 0.0%
- Poor: 0.0%
- Very poor: 0.0%
7. Training material archive

7.1. Purpose and scope

The objective is to build a catalogue of training materials available to eTRIKS members. Training materials may include: seminar notes, presentations, workbooks, self-study tutorials, workflows, etc., associated with a software version release. It provides the framework for determining how the training materials will be identified, developed, and delivered.

7.2. Training materials archive

All training material based on the public instance and/or public data is made available. Table B.2 lists the material available for training as exposed in the community spreadsheet. (URL: https://app.smartsheet.com/b/home)
A. Training feedback survey & results

A.1. Survey form

<table>
<thead>
<tr>
<th>* Please indicate your impressions on the items listed below</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly disagree</th>
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</thead>
<tbody>
<tr>
<td>The training met my expectations</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>I will be able to apply the knowledge learned</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>The training objectives for each topic were identified and followed</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The content was organized and easy to follow</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The topics covered were relevant to me</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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</tr>
<tr>
<td>The time allotted for the training was sufficient</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>The trainer met the training objectives</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Class participation and interaction were encouraged</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Adequate time was provided for questions and discussion</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

* How do you rate the training overall?
Choose one of the following answers
☑ Excellent
☐ Good
☐ Average
☐ Poor
☐ Very poor
### A.2. Data protection trainings

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- The training met my expectations [1]
- The content was organized and easy to follow [2]
- The topics covered were relevant to me [3]
- The time allotted for the training was sufficient [4]
- Class participation and interaction were encouraged [5]
- Adequate time was provided for questions and discussion [6]
A.3. Data analysis trainings

<table>
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<th>I will be able to apply the knowledge learned [2]</th>
<th>The training objectives […] were identified and followed [3]</th>
<th>The content was organized and easy to follow [4]</th>
<th>The topics covered were relevant to me [5]</th>
<th>The time allotted for the training was sufficient [6]</th>
<th>The trainer met the training objectives [7]</th>
<th>Class participation and interaction were encouraged [8]</th>
<th>Adequate time was provided for questions and discussion [9]</th>
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<tbody>
<tr>
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A.4. Curation trainings

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<th>The training objectives [...] were identified and followed [3]</th>
<th>The content was organized and easy to follow [4]</th>
<th>The topics covered were relevant to me [5]</th>
<th>The time allotted for the training was sufficient [6]</th>
<th>The trainer met the training objectives [7]</th>
<th>Class participation and interaction were encouraged [8]</th>
<th>Adequate time was provided for questions and discussion [9]</th>
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### B. Training Archive tables

Table B1 fields are:

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</thead>
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<td>Title</td>
<td>the training title</td>
</tr>
<tr>
<td>WP</td>
<td>the work package responsible for the training. If the responsible was member of the eTRIKS Network, the field will be tagged with &quot;NW&quot;</td>
</tr>
<tr>
<td>Presenter</td>
<td>trainer’s name</td>
</tr>
<tr>
<td>Presenter Organization</td>
<td>trainer’s affiliation</td>
</tr>
<tr>
<td>Audience</td>
<td>the group for whom the training was prepared</td>
</tr>
<tr>
<td>Audience numbers</td>
<td>number of trainees</td>
</tr>
<tr>
<td>Media</td>
<td>how the training was delivered</td>
</tr>
<tr>
<td>Project</td>
<td>name of the project that benefits of the training</td>
</tr>
<tr>
<td>Platform Details</td>
<td>details on the software (tranSMART, ICE, OTRS) used</td>
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</table>

Table B2 fields are:

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<th>Date Delivered</th>
<th>when the training was provided or the documents distributed</th>
</tr>
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<tbody>
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</tr>
<tr>
<td>Version Number</td>
<td>version of the document(s)</td>
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<tr>
<td>Presenter / Contact</td>
<td>documents author or the distributor</td>
</tr>
<tr>
<td>WP</td>
<td>work package ID or &quot;NW&quot; if the training was delivered by an eTRIKS Network partner</td>
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<td>information related to the author’s affiliation</td>
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<td>Target Audience</td>
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</tr>
<tr>
<td>Document Format</td>
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</tr>
<tr>
<td>Data type</td>
<td>type of data used through the document</td>
</tr>
<tr>
<td>Location</td>
<td>where the master documents are stored. For electronic documents, a network location is provided</td>
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<tr>
<td>Access</td>
<td>access restriction information</td>
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</table>
## B.1. Training History table

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<th>Audience</th>
<th>Media</th>
<th>Platform details</th>
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<td>J&amp;J</td>
<td>eTRIKS Community</td>
<td>Web Training</td>
<td>JnJ Instance</td>
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<td>eTRIKS data managers</td>
<td>Web Training</td>
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<td>BAOPRED instance</td>
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<td>CNRS</td>
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<td>ICL &amp; CNRS</td>
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**Presenter:**
- G. Wang
- P.-Y. Lastic
- I. Pandis
- E. Van Der Stuyft
- J. J
- I. Pandis
- I. Pandis
- I. Pandis
- N. Jullian
- A. Bahr
- I. Pandis, N. Jullian & M. Saqi

**Audience numbers:**
- 25
- 21
- 21
- ~20
- 1
- 4
- ~25
- ~15
- 14 & 18

**Date:**
- 14/12/12
- 11/01/13
- 07/02/13
- 15/06/13
- 22/05/13
- 21/06/13
- 28/11/13
- 02/12/13
- 19/12/13
- 20/12/13
- 28/01/14

**Platform details:**
- JnJ Instance
- NA
- U-UBIOPRED instance
- U-UBIOPRED instance
- U-UBIOPRED instance
- U-UBIOPRED instance
- U-UBIOPRED instance
- U-UBIOPRED instance
- U-UBIOPRED instance
- U-UBIOPRED instance
- U-UBIOPRED instance

**Media:**
- Web Training
- Face to Face
- Web Training
- Web Training
- Web Training
- Web Training
- Web Training
- Web Training
- Web Training
- Web Training

**Project:**
- eTRIKS
- eTRIKS
- eTRIKS
- U-UBIOPRED
- U-UBIOPRED
- U-UBIOPRED
- U-UBIOPRED
- U-UBIOPRED
- eTRIKS
- eTRIKS
- eTRIKS

**Organization:**
- J & J
- CDISC
- CDISC
- ICL
- ICL
- J & J
- ICL
- J & J
- ICL
- ICL
- ICL
- ICL
- ICL & CNRS
- ICL & CNRS

**Title:**
- Curation in tranSMART
- CDISC Introduction for IMI Projects
- eTRIKS-UBIOPRED-ONCOTRACK Training
- eTRIKS-UBIOPRED-ONCOTRACK Training
- eTRIKS-UBIOPRED-ONCOTRACK Training
- NOVARTIS (CD) for tranSMART demo and training
- NOVARTIS (UK) for tranSMART demo and training
- Personal Data Protection regulations
- Southampton University tranSMART demo and training
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<td>J &amp; J</td>
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**Presenter/Contact**
N. Jullian
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G. Marchetti, W. Gu, P. Liu
G. Marchetti
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