



KAISER PERMANENTE®

DOCUMENT NUMBER:
DOCUMENT TITLE:
DOCUMENT NOTES:

LOCATION:	VERSION:
DOC TYPE:	STATUS:

EFFECTIVE DATE:	NEXT REVIEW DATE:
RELEASE DATE:	EXPIRATION DATE:

AUTHOR:	PREVIOUS NUMBER:
OWNER:	CHANGE NUMBER:

Creating and Collaboration of a Document Infocard in MasterControl

Purpose This procedure provides instructions for creating and the process of collaboration of a document in MasterControl.

Scope All personnel trained in performing and implementing any of the activities described in this procedure.

Responsibility The table below lists the actions and responsible parties for this procedure.

Action	Responsible Party
Review and Approval	Laboratory/Medical Director or designee
Oversight, Maintenance and Training	Quality Assurance
Implementation of the activities described in this procedure	All trained personnel performing any of the tasks in this procedure

Definitions

Approval Route	A document route in which a document is sent for initial and/or final approval. Changes cannot be made to any document on an approval route without being “rejected” first by the approver.
Collaboration Leader	The collaboration leader has the ability to add members to a collaboration task, and has the authority to end or abort the collaboration task at any time. The Collaboration Leader is the only one in a collaboration task who has final say on the document, and who can launch the document on an approval route.
Collaboration Member	A user that is added by a Collaboration Leader for the purposes of making redline changes to a document.

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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Definitions (continued)

Collaboration Workspace	A place to provide input and changes to the uploaded file of an InfoCard before routing it for approval. In the normal course of collaboration, users will enter the collaboration workspace, copy a file for modification (redlining), modify the document (tracking or redlining the modifications), upload the modified document (redline), add comments if necessary, and then sign off on collaboration. Signing off on collaboration signifies that the user is finished with their modifications or has determined that no modifications are required.
Effective Date	The date entered on an InfoCard that is intended to be the date the related document becomes effective or implemented.
Electronic File	A document file that is created and saved on a user's computer for the purpose of uploading into the MasterControl software application. Electronic files should always be deleted off of the user's computer after proper upload of the document into MasterControl.
Electronic Signature	A unique password associated with a specific user, in place of the traditional written signature.
Infocard	Infocards contain information about a specific document. Examples of this information include: InfoCard #, Title, Author, Owner, Vault, Released Date, Retired Date, Notes, or any other information pertinent to that document. Each document within MasterControl must be associated with an InfoCard in order to be filed, searched and/or sorted.
My Tasks	An "Inbox" within MasterControl that is user specific. If there is anything in a user's My Tasks folder, that user has a task or action that they need to attend to.

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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Definitions (continued)


Packet Task	A task that is to be sent on a collaboration and/or approval route. A Packet task can contain one document or many documents and is up to the originator of the packet task to decide what is contained within the task, and the route that the task is to be sent on.
Redline	The term used to modify or update a document that is on a collaboration route. Redlining is to be done with the Track Changes function turned ON in Microsoft Word in order to see the revisions that have been made.

When creating a new document...

Use the appropriate Quality Management Systems standard document templates found in MasterControl.

Creating a new document InfoCard








Follow the steps below to create a new document InfoCard in MasterControl.

Step	Action
1	Log onto MasterControl, enter your User ID and Login password.
2	On the left hand side of the MasterControl Home Page screen, click on Documents . <ul style="list-style-type: none"> • click the Create a New Document folder icon, or • Click on Documents, and then click on  New. The Select InfoCard Type window will appear.
3	<ul style="list-style-type: none"> • Select the appropriate document InfoCard Type for your location. Refer to InfoCard Type Reference Chart to assist you in your selection. The Subtype selection will appear. • Select the appropriate Subtype for your department and click Continue. The Document InfoCard screen will appear. <p><i>Note:</i> A Document number and Revision number will be automatically generated.</p>

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Creating and Collaboration of a Document Infocard in MasterControl, Continued



Creating a new document InfoCard (continued)

Step	Action						
4	In the Title field, copy and paste the exact title of the document as it appears in the document, and enter any applicable notes in the <i>Notes</i> field.						
5	<p>In the Other Information section, select the appropriate <i>Author</i> and <i>Owner</i>, and enter any <i>Previous Number</i> the procedure may have had.</p> <table border="1" data-bbox="565 793 1393 1287"> <thead> <tr> <th data-bbox="565 793 786 835">If the...</th> <th data-bbox="786 793 1393 835">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="565 835 786 953">Author is someone other than yourself</td> <td data-bbox="786 835 1393 953">Click on the  icon next to <i>Author</i>, and the Select A User screen will appear. Scroll to highlight the Author's name, and click OK.</td> </tr> <tr> <td data-bbox="565 953 786 1071">Owner is someone other than yourself</td> <td data-bbox="786 953 1393 1071">Click on the  icon next to <i>Owner</i>, and the Select A User screen will appear. Scroll to highlight the Owner's name, and click OK.</td> </tr> </tbody> </table> <p>Note: It is recommended that the role designated for the document owner in MasterControl is assigned as the document owner instead of an actual person.</p>	If the...	Then...	Author is someone other than yourself	Click on the  icon next to <i>Author</i> , and the Select A User screen will appear. Scroll to highlight the Author's name, and click OK .	Owner is someone other than yourself	Click on the  icon next to <i>Owner</i> , and the Select A User screen will appear. Scroll to highlight the Owner's name, and click OK .
If the...	Then...						
Author is someone other than yourself	Click on the  icon next to <i>Author</i> , and the Select A User screen will appear. Scroll to highlight the Author's name, and click OK .						
Owner is someone other than yourself	Click on the  icon next to <i>Owner</i> , and the Select A User screen will appear. Scroll to highlight the Owner's name, and click OK .						
6	<p>If the file is ready to be upload, click on the  icon in the Main File section next to <i>File Name</i>. The Add InfoCard Document File window will appear.</p> <ul style="list-style-type: none"> • Click Browse to locate the file to be uploaded, select the document file, and click Open. The document file name will appear in the <i>File Name</i> window. • Click Load File. The document file name will appear in the <i>File Name</i> window in the Main File section. 						

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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Creating a new document InfoCard (continued)

Step	Action
7	<ul style="list-style-type: none"> Click the Custom Fields tab. The Custom Fields screen will appear. In the Value sections, scroll to and highlight custom field(s) in the <i>Available</i> section to be added to the <i>Selected</i> box by clicking the  Add Value(s) arrow. <p>Notes:</p> <ul style="list-style-type: none"> Custom Fields is mandatory. The custom field's value will allow a user to view the document in the appropriate organizer folder category in My Organizer.
8	<ul style="list-style-type: none"> Review all information entered in the document InfoCard for accuracy and click  Save. The 'InfoCard successfully saved' message will appear. Delete the document electronic file from your computer.

Sending a document InfoCard for approval



Follow the steps below to send a document InfoCard for approval.

Step	Action
1	From the document infocard, click  Sign Off and select New Packet Task from the dropdown menu. The Start Task screen will open.
2	<p>In the Task Information section, enter a Task Name.</p> <p>Note: <i>If inputting a single document, it is recommended to enter the title (or an abbreviated version) of the document.</i></p>

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Creating and Collaboration of a Document Infocard in MasterControl, Continued










Sending a document InfoCard for approval (continued)

Step	Action
3	<p>Optionally, in the Task Information section, enter applicable instructions in the Instructions field.</p> <p><i>Note:</i> <i>These Instructions are also sent to those on the Notify Trainers step, in addition to the approvers.</i></p>
4	<ul style="list-style-type: none"> • In the Route Information section, select the appropriate Route Name from the dropdown list. <p><i>Note:</i> <i>There may only be a single option from the dropdown menu.</i></p> <ul style="list-style-type: none"> • Ensure that the appropriate route is selected by reviewing the Route Description with the Available Route Steps that will appear after selecting the Route Name.
5	<p>In the Change Request Information section, enter the Proposed Changes (what you are changing) and Reason for Change (why you are changing).</p> <p><i>Note:</i> For new documents, it is sufficient to say something like “New Assay” or “New Form” in the Proposed Changes field.</p>
6	<p>Optionally, in the Task Contents  section, additional document changes can be added to the packet for revisions and/or new document infocards.</p> <p>Load any additional document InfoCards pertaining to the task by performing an InfoCard search, submitting the search, and retrieving the appropriate InfoCards.</p>
7	<p>Optionally, in the Task Options  section, attach any supporting information outside of MasterControl and/or add any supporting InfoCard links for reference only that pertain to the task in this section.</p> <p><i>Note:</i> <i>For approver awareness, document in the Instructions field if attaching supporting information and/or adding supporting InfoCard links.</i></p>

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Creating and Collaboration of a Document Infocard in MasterControl, Continued


Sending a document InfoCard for approval (continued)

Step	Action						
8	<p>Launch the Packet Task now or at a later date.</p> <table border="1" data-bbox="565 617 1395 1033"> <thead> <tr> <th data-bbox="565 617 881 695">If you wish to launch the packet task...</th> <th data-bbox="881 617 1395 695">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="565 695 881 737">Now</td> <td data-bbox="881 695 1395 737">Click  Launch Task.</td> </tr> <tr> <td data-bbox="565 737 881 1033">At a later date</td> <td data-bbox="881 737 1395 1033"> <ul style="list-style-type: none"> • Click the Save  button to save the task and launch at a later time. • Launch the saved task later by going to My MasterControl, click Start Task, and click Packets. • Under Actions, click the launch  icon of the packet task you want to launch. </td> </tr> </tbody> </table> <p>Note: When a packet task is successfully launched, the designated approver(s) will receive a task notification via e-mail, and the Change Request/New Document task will appear in the approver's My Tasks in MasterControl.</p>	If you wish to launch the packet task...	Then...	Now	Click  Launch Task .	At a later date	<ul style="list-style-type: none"> • Click the Save  button to save the task and launch at a later time. • Launch the saved task later by going to My MasterControl, click Start Task, and click Packets. • Under Actions, click the launch  icon of the packet task you want to launch.
If you wish to launch the packet task...	Then...						
Now	Click  Launch Task .						
At a later date	<ul style="list-style-type: none"> • Click the Save  button to save the task and launch at a later time. • Launch the saved task later by going to My MasterControl, click Start Task, and click Packets. • Under Actions, click the launch  icon of the packet task you want to launch. 						

Approving Change Request Step

Follow the steps below to approve a new document or change request packet.






Note:
Only a single approval is required to move to the next Collaboration step.

Step	Action
1	Click on My Tasks in the My MasterControl page.
2	Under <i>Task Name</i> , select the packet that has the New Document or Change Request Step Name you would like to review, and click Change Request  . The View Task page will appear.

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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Approving Change Request Step (continued)



Step	Action						
3	Review the View Packet details that include information on: <ul style="list-style-type: none"> • Any Instructions, Proposed Changes and Reason for Change • The Task Contents  section: <ul style="list-style-type: none"> • Click the View Document  or  icon to open and review the document, if the file was uploaded. • Click the View InfoCard  icon to open and review the InfoCard in the Document InfoCard screen. • Any other information and attachments pertaining to the packet. 						
4	Click Sign-Off  to approve or reject the packet. The Sign Off Task: window will appear.						
5	Select the appropriate Status from the dropdown menu. <table border="1" data-bbox="565 989 1386 1472" style="margin-left: 20px;"> <thead> <tr> <th data-bbox="565 989 894 1024">If the packet is...</th> <th data-bbox="894 989 1386 1024">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="565 1024 894 1178">Approved</td> <td data-bbox="894 1024 1386 1178"> The Collaboration Packet Actions window will appear. <ul style="list-style-type: none"> • Select Native. • Click Continue. </td> </tr> <tr> <td data-bbox="565 1178 894 1472">Rejected</td> <td data-bbox="894 1178 1386 1472"> Your comment must be entered in the <i>Comments</i> section as to the reason for the rejection, and click Save. <i>Note:</i> The rejected packet is returned to the initiator's Start Task. </td> </tr> </tbody> </table>	If the packet is...	Then...	Approved	The Collaboration Packet Actions window will appear. <ul style="list-style-type: none"> • Select Native. • Click Continue. 	Rejected	Your comment must be entered in the <i>Comments</i> section as to the reason for the rejection, and click Save . <i>Note:</i> The rejected packet is returned to the initiator's Start Task .
If the packet is...	Then...						
Approved	The Collaboration Packet Actions window will appear. <ul style="list-style-type: none"> • Select Native. • Click Continue. 						
Rejected	Your comment must be entered in the <i>Comments</i> section as to the reason for the rejection, and click Save . <i>Note:</i> The rejected packet is returned to the initiator's Start Task .						

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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Opening the Collaboration Packet

Follow the steps below to open the collaboration packet.

Step	Action						
1	Click on My Tasks .						
2	<p>Under <i>Task Name</i>, select the packet that has the <i>Step Name</i> ‘Collaboration’, and click on the task name or Collaborate  icon to open the Collaboration Workspace screen.</p> <p><i>Notes:</i></p> <ul style="list-style-type: none"> • The Collaboration Workspace First -Time Help window will appear on your first collaboration. • Click the Close  icon to exit out of the window. The Collaboration Workspace screen will appear 						
3	<p>For each department, it is recommended that a delegate (typically the Assistant Director) be identified as the Collaboration Leader.</p> <p>It is the Collaboration Leader’s responsibility to finalize the file and end collaboration to route the documents for Initial/Final approval.</p> <table border="1" data-bbox="565 1171 1393 1472"> <tr> <td data-bbox="565 1171 889 1245">If you are a...</td> <td data-bbox="889 1171 1393 1245">Then follow in order the procedure blocks for...</td> </tr> <tr> <td data-bbox="565 1245 889 1318">Collaborator</td> <td data-bbox="889 1245 1393 1318"> <ol style="list-style-type: none"> 1. Collaborating and redlining 2. Signing off Collaboration </td> </tr> <tr> <td data-bbox="565 1318 889 1472">Collaboration Leader</td> <td data-bbox="889 1318 1393 1472"> <ol style="list-style-type: none"> 1. Collaboration Leader Only – Adding and/or deleting users 2. Collaborating and redlining 3. Signing off Collaboration </td> </tr> </table>	If you are a...	Then follow in order the procedure blocks for...	Collaborator	<ol style="list-style-type: none"> 1. Collaborating and redlining 2. Signing off Collaboration 	Collaboration Leader	<ol style="list-style-type: none"> 1. Collaboration Leader Only – Adding and/or deleting users 2. Collaborating and redlining 3. Signing off Collaboration
If you are a...	Then follow in order the procedure blocks for...						
Collaborator	<ol style="list-style-type: none"> 1. Collaborating and redlining 2. Signing off Collaboration 						
Collaboration Leader	<ol style="list-style-type: none"> 1. Collaboration Leader Only – Adding and/or deleting users 2. Collaborating and redlining 3. Signing off Collaboration 						

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Creating and Collaboration of a Document Infocard in MasterControl, Continued





Collaboration Leader Only –

Follow the steps below to add/delete users to the collaboration workspace.

Adding and/or deleting users

Notes:

- Only a Collaboration Leader can add/delete users to the collaboration workspace by using the  *Modify Step* icon in the My Tasks screen or Collaboration Workspace screen.





Step	Action						
1	Determine if a user is to be added and/or deleted to the collaboration workspace. <table border="1" data-bbox="558 831 1398 989"> <thead> <tr> <th data-bbox="558 831 979 869">If ...</th> <th data-bbox="979 831 1398 869">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="558 869 979 947">No users are to be added/deleted</td> <td data-bbox="979 869 1398 947">Proceed to procedure block Collaborating and redlining.</td> </tr> <tr> <td data-bbox="558 947 979 989">Users are to be added/deleted</td> <td data-bbox="979 947 1398 989">Proceed to Step 2.</td> </tr> </tbody> </table>	If ...	Then...	No users are to be added/deleted	Proceed to procedure block Collaborating and redlining.	Users are to be added/deleted	Proceed to Step 2.
If ...	Then...						
No users are to be added/deleted	Proceed to procedure block Collaborating and redlining.						
Users are to be added/deleted	Proceed to Step 2.						
2	In the Collaboration Workspace screen, click  <i>Modify Step</i> icon in the > Members section. The Modify Step window will appear.						
3	<ul style="list-style-type: none"> • Scroll to and highlight a user in the <i>Available</i> section to be added to the <i>Collaborators</i> box by clicking the  Add Step User arrow. • Click the  Remove Step User arrow to remove a user in the Collaborators and/or Leaders box. 						
4	Click Save , or click Undo Changes to discard all changes.						
5	Enter your comments in the Change Reason window, and click Save . The Modify Step window will reappear with the message ‘Successfully Modified Step’. Close the window. <p>Note: If you attempt to add a user that does not have collaboration rights to the document vault, a message will appear informing you of that fact, in which case you should remove that user by highlighting the name and clicking on the  Remove Step User icon.</p>						

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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Collaborating and redlining




Follow the steps below to collaborate and redline.

Step	Action
	Redlining
1	<p>Click the <i>Collaboration Workspace</i> tab.</p> <ul style="list-style-type: none"> In the All InfoCards  section under Collaboration Actions, click the Edit File  icon to open each file in its native application. If a file was not previously uploaded to the new document infocard, a message may appear. If so, continue on with the “Uploading the Redlined InfoCard File” subsection. Depending on the Browser version selected, a message may appear at the bottom of the window asking if you want to open or save the file. Select the desired option. <p>Notes:</p> <ul style="list-style-type: none"> <i>If the document is locked, click the Unlock  icon to access the Edit File  icon. It is recommended to communicate with other team members regarding possible edits prior to unlocking. Only collaboration leaders or system administrators can unlock locked documents</i> <i>If the browser window becomes blank, refer to the Opening the Collaboration Packet block to return to the Collaboration Workspace.</i>
2	Depending on the Microsoft Word version, click Enable Editing and/or enable Track Changes in Microsoft Word after opening the file, and make any necessary changes to the document.
3	Click Save As , and save the document in your computer where you can remember to retrieve it for uploading.
4	Close the document.

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Creating and Collaboration of a Document Infocard in MasterControl, Continued









Collaborating and redlining (continued)

Step	Action
	Uploading the Redlined InfoCard File
5	In Collaboration Actions , click the Upload Changes  icon to upload your changes to the document. The Add Collaboration Redline window will appear.
6	<ul style="list-style-type: none">• Click Browse, locate the file in your computer, click Open, and click Load File.• Repeat Steps 4 and 5 for all InfoCards in the task that will need file changes to be uploaded. <p><i>Notes:</i></p> <ul style="list-style-type: none">• If a collaborator does not have redlines to upload, the Collaboration Workspace must be unlocked so that other collaborators can access the file.
7	Under Collaboration Actions , click  View Changes. The View Redlines window will appear. <ul style="list-style-type: none">• Click  View Redlines to open the document, and confirm that your modified document was uploaded.• Delete the file from your computer.• Repeat this step for all InfoCards in the task.

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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Collaborating and redlining (continued)

Step	Action						
Revision History and Collaboration Comments							
8	<ul style="list-style-type: none"> Under <i>Actions</i>, click the Details  icon (blue ‘puzzle piece’ icon). The Packet Item Details window will appear. Complete the mandatory <i>Change Description</i> and <i>Reason for Change</i> fields. Click Save. Repeat this step for all InfoCards in the task, if needed. <p>Important Notes:</p> <ul style="list-style-type: none"> The Packet Item Details will show in the approver’s View Task screen where the approver can review the details of the packet before approval or rejection. The Packet Item Details will reside in the Document InfoCard’s history and will be used to verify the revision history for future inspections. 						
9	<ul style="list-style-type: none"> Click the Comments  icon if you wish to exchange ideas, document instructions and/or comments outside the context of the document before signing off. Click the Save button. The comments are added to the Comments field. <table border="1" data-bbox="565 1262 1393 1791"> <thead> <tr> <th data-bbox="565 1262 776 1304">If you are a...</th> <th data-bbox="776 1262 1393 1304">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="565 1304 776 1377">Collaborator</td> <td data-bbox="776 1304 1393 1377">Proceed to procedure block Signing off Collaboration</td> </tr> <tr> <td data-bbox="565 1377 776 1791">Collaboration Leader</td> <td data-bbox="776 1377 1393 1791"> <ul style="list-style-type: none"> Document the due date for redlines to other collaborators, if needed, and Click  Return tab. Check other collaborators’ progress and comments on the task by clicking Tracking  under Actions in your My Tasks screen. When the packet is ready to be sent for Initial/Final approval, proceed to procedure block Signing off Collaboration </td> </tr> </tbody> </table>	If you are a...	Then...	Collaborator	Proceed to procedure block Signing off Collaboration	Collaboration Leader	<ul style="list-style-type: none"> Document the due date for redlines to other collaborators, if needed, and Click  Return tab. Check other collaborators’ progress and comments on the task by clicking Tracking  under Actions in your My Tasks screen. When the packet is ready to be sent for Initial/Final approval, proceed to procedure block Signing off Collaboration
If you are a...	Then...						
Collaborator	Proceed to procedure block Signing off Collaboration						
Collaboration Leader	<ul style="list-style-type: none"> Document the due date for redlines to other collaborators, if needed, and Click  Return tab. Check other collaborators’ progress and comments on the task by clicking Tracking  under Actions in your My Tasks screen. When the packet is ready to be sent for Initial/Final approval, proceed to procedure block Signing off Collaboration 						

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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Signing off Collaboration

Follow the steps below for signing off in collaboration.

Notes:







- The Collaboration Leader is responsible for uploading the final document without redlines in the document InfoCard before approval.
- A Collaboration Leader can end collaboration at any time whether or not other collaborators have participated in the task.

Step	Action						
1	<p data-bbox="540 772 977 806">Sign off on the collaboration task.</p> <p data-bbox="540 835 630 869">Notes:</p> <ul data-bbox="540 869 1412 1129" style="list-style-type: none"> • If the  Sign Off icon does not appear, click the Unlock  icon. <i>It is recommended to communicate with other team members regarding possible edits prior to unlocking.</i> • If the user is finished working in collaboration, but would like to return again to make more redlines, DO NOT sign off on the collaboration task. Doing this will disable collaboration access, and will prevent the user from making further updates. <table border="1" data-bbox="565 1163 1393 1759"> <thead> <tr> <th data-bbox="565 1163 792 1197">If you are a...</th> <th data-bbox="792 1163 1393 1197">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="565 1197 792 1688">Collaborator</td> <td data-bbox="792 1197 1393 1688"> <ul style="list-style-type: none"> • Click  Sign Off. The Sign Off on Collaboration window will appear. • Enter your Electronic Signature, and choose one of the following status options: <ul style="list-style-type: none"> • Complete – This means that you are signing off on the collaboration task for now, but would like it to return to you if someone else makes any changes to the document. • Complete & Quit – This means that you are signing off on the collaboration task, and you do not want it returned to you if someone else makes changes. </td> </tr> <tr> <td data-bbox="565 1688 792 1759">Collaboration Leader</td> <td data-bbox="792 1688 1393 1759">Proceed to Step 2 after the designated due date for redlines.</td> </tr> </tbody> </table>	If you are a...	Then...	Collaborator	<ul style="list-style-type: none"> • Click  Sign Off. The Sign Off on Collaboration window will appear. • Enter your Electronic Signature, and choose one of the following status options: <ul style="list-style-type: none"> • Complete – This means that you are signing off on the collaboration task for now, but would like it to return to you if someone else makes any changes to the document. • Complete & Quit – This means that you are signing off on the collaboration task, and you do not want it returned to you if someone else makes changes. 	Collaboration Leader	Proceed to Step 2 after the designated due date for redlines.
If you are a...	Then...						
Collaborator	<ul style="list-style-type: none"> • Click  Sign Off. The Sign Off on Collaboration window will appear. • Enter your Electronic Signature, and choose one of the following status options: <ul style="list-style-type: none"> • Complete – This means that you are signing off on the collaboration task for now, but would like it to return to you if someone else makes any changes to the document. • Complete & Quit – This means that you are signing off on the collaboration task, and you do not want it returned to you if someone else makes changes. 						
Collaboration Leader	Proceed to Step 2 after the designated due date for redlines.						

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Creating and Collaboration of a Document Infocard in MasterControl, Continued



Signing off Collaboration Collaboration (continued)

Step	Action
Collaboration Leader Only	
2	<p>Create the final version of each document:</p> <ul style="list-style-type: none"> • Review redlines by clicking the View Changes  icon under Collaboration Actions. • Click the Edit File  icon to open each file in its native application. • Modify/accept all changes in the document, click Save As, and close the document. • Click the Upload Changes  icon to upload your modification/acceptance to the document.
3	<p>Update the document infocard(s) information (if applicable):</p> <ul style="list-style-type: none"> • Click the Edit File  icon. • Click the link to the document under Infocard Number to go to the Infocard. • On the Infocard screen, click Edit > Edit. Make any changes (e.g. title, author, or custom fields). • Click the Save button. Enter Change Reason, and click the Save button. • Close the infocard, and return to the packet Collaboration screen. • <i>Click the Unlock  icon to remove the lock on the infocard.</i>
4	<p>Finalize revision history for each infocard:</p> <ul style="list-style-type: none"> • Under <i>Actions</i>, click the Details  icon (blue ‘puzzle piece’ icon). The Packet Item Details window will appear. • Review and enter/modify the Change Description and Reason for Change and click Save.

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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Signing off Collaboration Collaboration (continued)

Step	Action						
5	<p>Upload the Final File to Each Infocard:</p> <ul style="list-style-type: none"> In the Collaboration Workspace tab under <i>Actions</i>, click the Replace File  icon. The Replace InfoCard Main File window will appear. Check the box Use Latest Redline, and click the Load File button. <p><i>Note:</i> The final version can also be uploaded by unchecking the Use Latest Redline option, selecting the final version by browsing to its location, and clicking the Load File button.</p>						
6	<ul style="list-style-type: none"> Click Sign Off . The Sign Off on Collaboration: window will appear. Enter your comments, if any, your User ID and Electronic Signature. Select one of the following Status options that may appear from the drop down menu, and click Save. <ul style="list-style-type: none"> End Collaboration - This will end the collaboration and move the packet into the next route step. <table border="1" data-bbox="548 1318 1377 1581"> <thead> <tr> <th data-bbox="548 1318 1060 1360">If the following error displays...</th> <th data-bbox="1060 1318 1377 1360">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="548 1360 1060 1476">All Infocards in collaboration require the Change description and Reason for Change fields to be populated.</td> <td data-bbox="1060 1360 1377 1476">Fill in the fields per Step 4 above.</td> </tr> <tr> <td data-bbox="548 1476 1060 1581">The main files on the following InfoCards are older than the latest redline.</td> <td data-bbox="1060 1476 1377 1581">Update the final file per Step 5 above.</td> </tr> </tbody> </table> <ul style="list-style-type: none"> Abort Collaboration – This will abort or end the collaboration completely and permanently, and the packet will return to the initiator’s Start Task. 	If the following error displays...	Then...	All Infocards in collaboration require the Change description and Reason for Change fields to be populated.	Fill in the fields per Step 4 above.	The main files on the following InfoCards are older than the latest redline.	Update the final file per Step 5 above.
If the following error displays...	Then...						
All Infocards in collaboration require the Change description and Reason for Change fields to be populated.	Fill in the fields per Step 4 above.						
The main files on the following InfoCards are older than the latest redline.	Update the final file per Step 5 above.						


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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Packet Tracking for Initial/Final Approval

Follow the steps below to track the packet during initial/final approval.

Refer to “Approving and Implementing Documents in MasterControl” procedure for instructions on initial/final approval.

Step	Action
1	Click on Tracking in the My MasterControl page.
2	Click the Search button, and click the Basic tab.
3	The following search criteria (among others) are available: <ul style="list-style-type: none"> • Task Name: Useful for looking for a specific packet • User ID: Useful for looking for all of the packets you initiated. • Route Name: Useful for looking for all packets for a department.
4	<ul style="list-style-type: none"> • Click the Submit Search button. • Click the Details  icon (blue ‘puzzle piece’ icon) under the far-right Action column. • Scroll down to the Initial Approval and Final Approval sections.

If your task gets rejected in the initial or final approval route

Follow the steps below if your task gets rejected by the initial or final approver.




Step	Action
1	Go to the Opening the Collaboration Packet block of this procedure to view the rejected task, and continue from that section. <i>Note:</i> <i>The Rejection Comments will be listed in the Comments section of the Collaboration Workspace.</i>

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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Setting the effective date

Follow the steps below to set the effective date of the document in the task after initial/final approval.

Step	Action
1	Click on My Tasks , and click Sign-Off  on the task you would like to view. The View Task screen will appear.
2	Review the details of the packet that includes the task contents and any task options.
3	Click  Sign Off . The Sign Off Task: window will appear.
4	In the Sign Off: Set Effective Date section under Dates , click on Show dates .
5	In the Effective Date field, click on  for today's date, or click the calendar icon to select another date. A two week period is a typically recommended time period to conduct training. Warning! <i>Do not place a date on the Expiration Date field as this is used for archiving documents only.</i>
6	Enter your User ID, Electronic Signature, and click Save . Notes: <i>The Status dropdown menu is preselected and fixed at the Approved status.</i> <i>The users assigned to the Notify Trainers step will be emailed after sign-off.</i>

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Creating and Collaboration of a Document Infocard in MasterControl, Continued

Non-Controlled Documents The following non-controlled documents support this procedure.

- MasterControl Suite Online Help
- MasterControl Manual

Controlled Documents The following controlled documents support this procedure.

Procedure
General Use of MasterControl
Approving Documents in MasterControl

Author Emeline Santos, SCPMG Quality Assurance Coordinator
Matthew Jones, SCPMG Systems Consultant

Signature Manifest

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All dates and times are in Pacific Standard Time.

MasterControl PPP Updates

Initial Approval

Name/Signature	Title	Date	Meaning/Reason
Fred Ung (K057175)	SCPMG LABORATORY QCD	26 Jul 2016, 03:29:24 PM	Approved
Maureen Ahler (K083442)	Quality Systems Leader	01 Aug 2016, 03:38:36 PM	Approved

Final Approval

Name/Signature	Title	Date	Meaning/Reason
Gary Gochman (P091953)	SCPMG Laboratories AP Dir	08 Aug 2016, 06:10:41 PM	Approved
Darryl Palmer-Toy (T188420)	SCPMG Laboratory Sys Med Dir	13 Aug 2016, 05:02:34 PM	Approved

Set Effective Date

Name/Signature	Title	Date	Meaning/Reason
Aidzz Ticsay (K109967)	Regional QA Coordinator		
Emeline Santos (K082273)	Regional Quality Assurance CD		
Maureen Ahler (K083442)	Quality Systems Leader	14 Aug 2016, 07:10:40 PM	Approved