



# KAISER PERMANENTE®

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## Collaborating in MasterControl

**Purpose** This procedure provides instructions for collaborating 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 revisions, 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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## Collaborating in MasterControl, Continued

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### 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 redlining (changing), modify the document, upload the redline (changes), add comments, and then sign off on collaboration. Signing off on collaboration signifies that the user is finished with their markups.
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.
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.

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## Collaborating in MasterControl, Continued

### Opening the Collaboration Packet

Follow the steps below to open the collaboration packet.

Step	Action						
1	Log onto MasterControl, enter your User ID and Login password.						
2	Click on <b>My Tasks</b> .						
3	<p>Under <i>Task Name</i>, select the packet that has the <i>Step Name</i> 'Collaboration', and click on the task name or <b>Collaborate</b>  icon to open the <b>Collaboration Workspace</b> screen.</p> <p><i>Notes:</i></p> <ul style="list-style-type: none"> <li>The Collaboration Workspace First -Time Help window will appear on your first collaboration.</li> <li>Click the Close  icon to exit out of the window. The <b>Collaboration Workspace</b> screen will appear</li> </ul>						
4	<ul style="list-style-type: none"> <li>To determine if you are a Collaboration Leader or a Collaborator, hover and click the <b>&gt;Members</b> in the <b>&gt;Members</b>  section to show or hide the collaborator(s).</li> <li>A Collaboration Leader is identified by a bold green text under the collaborator's status icon.</li> </ul> <table border="1" data-bbox="565 1150 1399 1465"> <thead> <tr> <th>If you are a...</th> <th>Then follow <b>in order</b> the procedure blocks for...</th> </tr> </thead> <tbody> <tr> <td>Collaboration Leader</td> <td> <ol style="list-style-type: none"> <li><b>Collaboration Leader – Adding and/or deleting users</b></li> <li><b>Collaborating and redlining</b></li> <li><b>Signing off</b></li> </ol> </td> </tr> <tr> <td>Collaborator</td> <td> <ol style="list-style-type: none"> <li><b>Collaborating and redlining</b></li> <li><b>Signing off</b></li> </ol> </td> </tr> </tbody> </table>	If you are a...	Then follow <b>in order</b> the procedure blocks for...	Collaboration Leader	<ol style="list-style-type: none"> <li><b>Collaboration Leader – Adding and/or deleting users</b></li> <li><b>Collaborating and redlining</b></li> <li><b>Signing off</b></li> </ol>	Collaborator	<ol style="list-style-type: none"> <li><b>Collaborating and redlining</b></li> <li><b>Signing off</b></li> </ol>
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Collaborator	<ol style="list-style-type: none"> <li><b>Collaborating and redlining</b></li> <li><b>Signing off</b></li> </ol>						


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## Collaborating in MasterControl, Continued

**Collaboration  
 Leader –  
 Adding and/or  
 deleting users**

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

**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.
- It is not recommended to have more than one Collaboration Leader and/or have an Add Only user in collaboration.

Step	Action						
1	Determine if a user is to be added and/or deleted to the collaboration workspace. <table border="1" data-bbox="558 842 1398 995" style="margin-left: 20px;"> <thead> <tr> <th data-bbox="558 842 979 884">If ...</th> <th data-bbox="979 842 1398 884">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="558 884 979 953">No users are to be added/deleted</td> <td data-bbox="979 884 1398 953">Proceed to procedure block <b>Collaborating and redlining.</b></td> </tr> <tr> <td data-bbox="558 953 979 995">Users are to be added/deleted</td> <td data-bbox="979 953 1398 995">Proceed to Step 2.</td> </tr> </tbody> </table>	If ...	Then...	No users are to be added/deleted	Proceed to procedure block <b>Collaborating and redlining.</b>	Users are to be added/deleted	Proceed to Step 2.
If ...	Then...						
No users are to be added/deleted	Proceed to procedure block <b>Collaborating and redlining.</b>						
Users are to be added/deleted	Proceed to Step 2.						
2	In the <b>Collaboration Workspace</b> screen, click  <i>Modify Step</i> icon in the >Members section. The <b>Modify Step</b> window will appear.						
3	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Click the  Remove Step User arrow to remove a user in the Collaborators and/or Leaders box.</li> </ul>						
4	Click <b>Save</b> , or click <b>Undo Changes</b> to discard all changes.						
5	Enter your comments in the <b>Change Reason</b> window, and click <b>Save</b> . The <b>Modify Step</b> window will reappear with the message ‘Successfully Modified Step’. Close the window. <p><b>Note:</b>                      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 .</p>						




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## Collaborating in MasterControl, Continued

### Collaborating and redlining







Follow the steps below to collaborate and redline.

Step	Action
<b>Redlining</b>	
1	<p>Click the <i>Collaboration Workspace</i> tab.</p> <ul style="list-style-type: none"> <li>• In the <b>All InfoCards +</b> section under <b>Collaboration Actions</b>, click the Edit File  icon to open each file in its native application.</li> <li>• If the document is locked, click the Unlock  icon to access the Edit File  icon.</li> </ul> <p><b>Notes:</b></p> <p>A message ‘To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for more options...’ <b>may</b> appear on a bar right above the Collaboration Workspace screen.</p> <ul style="list-style-type: none"> <li>• ‘Click here for more options..’ as instructed, and select <i>Download File...</i> in the dropdown menu. The MasterControl Portal Home Page screen will usually appear, or inadvertently a random InfoCard.</li> <li>• Click My MasterControl, then My Tasks. The My Tasks screen will reappear.</li> <li>• Repeat steps 1 and 2 to open the file.</li> <li>• Click <i>Open</i> to open the document when the <b>File Download</b> window appears.</li> </ul>
2	Depending on the Microsoft Word version, click <i>Enable Editing</i> and/or enable <b>Track Changes</b> in Microsoft Word, and make any necessary changes to the document.
3	Click <b>Save As</b> , and save the document in your computer where you can remember to retrieve it for uploading to the InfoCard.
4	Close the document.

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## Collaborating in MasterControl, Continued









### Collaborating and redlining (continued)

Step	Action
<b>Uploading the Redlined InfoCard File</b>	
1	<p>In <b>Collaboration Actions</b>, click the Upload Changes  icon to upload your redlines to the document. The <b>Add Collaboration Redline</b> window will appear.</p> <p><i>Note:</i>                      Redlines can only be seen by other collaborators if uploaded to the InfoCard using the  Upload Changes.</p>
2	<ul style="list-style-type: none"> <li>• Click <b>Browse</b>, locate the file in your computer, click Open, and click <b>Load File</b>.</li> <li>• Repeat Steps 1 and 2 for all InfoCards in the task that will need file changes to be uploaded.</li> </ul> <p><i>Notes:</i></p> <ul style="list-style-type: none"> <li>• If a collaborator does not have redlines to upload, the Collaboration Workspace must be unlocked so that other collaborators can access the file.</li> <li>• If you do not see the Edit File  icon, click the <b>Unlock</b>  icon to unlock the Collaboration Workspace.</li> </ul>
3	<p>Under <b>Collaboration Actions</b>, click  View Changes. The <b>View Redlines</b> window will appear.</p> <ul style="list-style-type: none"> <li>• Click  View Redlines to open the document and confirm that your redline was uploaded, and then delete the file from your computer.</li> <li>• Repeat this step for all InfoCards in the task.</li> </ul>

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## Collaborating in MasterControl, Continued

### Collaborating and redlining (continued)

Step	Action						
4	<ul style="list-style-type: none"> <li>• Under <i>Actions</i>, click the <b>Details</b>  icon (blue ‘puzzle piece’ icon). The <b>Packet Item Details</b> window will appear.</li> <li>• Complete the mandatory <i>Change Description</i> and <i>Reason for Change</i> fields.</li> <li>• Click <b>Save</b>. Repeat this step for all InfoCards in the task, if needed.</li> </ul> <p><i>Important Notes:</i></p> <ul style="list-style-type: none"> <li>• The <b>Packet Item Details</b> will show in the approver’s <b>View Task</b> screen where the approver can review the details of the packet before approval or rejection.</li> <li>• The <b>Packet Item Details</b> will reside in the Document InfoCard’s history.</li> </ul>						
5	<ul style="list-style-type: none"> <li>• Click the <b>Comments</b>  icon if you wish to exchange ideas, document instructions and/or comments outside the context of the document before signing off.</li> <li>• Click the <b>Save</b> button. The comments are added to the <b>Comments</b> field.</li> </ul> <table border="1" data-bbox="561 1192 1385 1539"> <thead> <tr> <th data-bbox="561 1192 781 1224">If you are a...</th> <th data-bbox="781 1192 1385 1224">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="561 1224 781 1493">Collaboration Leader</td> <td data-bbox="781 1224 1385 1493"> <ul style="list-style-type: none"> <li>• Document the due date for redlines to other collaborators, if needed, and</li> <li>• Click  Return tab.</li> <li>• Check other collaborators’ progress and comments on the task by clicking <b>Tracking</b>  under <b>Actions</b> in your <b>My Tasks</b> screen.</li> </ul> </td> </tr> <tr> <td data-bbox="561 1493 781 1539">Collaborator</td> <td data-bbox="781 1493 1385 1539">Proceed to procedure block <b>Signing off</b></td> </tr> </tbody> </table>	If you are a...	Then...	Collaboration Leader	<ul style="list-style-type: none"> <li>• Document the due date for redlines to other collaborators, if needed, and</li> <li>• Click  Return tab.</li> <li>• Check other collaborators’ progress and comments on the task by clicking <b>Tracking</b>  under <b>Actions</b> in your <b>My Tasks</b> screen.</li> </ul>	Collaborator	Proceed to procedure block <b>Signing off</b>
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Collaboration Leader	<ul style="list-style-type: none"> <li>• Document the due date for redlines to other collaborators, if needed, and</li> <li>• Click  Return tab.</li> <li>• Check other collaborators’ progress and comments on the task by clicking <b>Tracking</b>  under <b>Actions</b> in your <b>My Tasks</b> screen.</li> </ul>						
Collaborator	Proceed to procedure block <b>Signing off</b>						

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## Collaborating in MasterControl, Continued

**Signing off** 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>Sign off on the collaboration task.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• If the  Sign Off icon does not appear, click the Unlock  icon.</li> <li>• If the user is finished working in collaboration, but would like to return again to make more redlines, <b>DO NOT</b> sign off on the collaboration task. Doing this will disable collaboration access, and will prevent the user from making further updates.</li> </ul> <table border="1" data-bbox="570 1066 1398 1619"> <thead> <tr> <th data-bbox="570 1066 797 1104">If you are a...</th> <th data-bbox="797 1066 1398 1104">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="570 1104 797 1549">Collaborator</td> <td data-bbox="797 1104 1398 1549"> <ul style="list-style-type: none"> <li>• Click  Sign Off. The Sign Off on Collaboration window will appear.</li> <li>• Enter your Electronic Signature, and choose one of the following status options:                             <ul style="list-style-type: none"> <li>• <b>Complete</b> – 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.</li> <li>• <b>Complete &amp; Quit</b> – 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.</li> </ul> </li> </ul> </td> </tr> <tr> <td data-bbox="570 1549 797 1619">Collaboration Leader</td> <td data-bbox="797 1549 1398 1619">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"> <li>• Click  Sign Off. The Sign Off on Collaboration window will appear.</li> <li>• Enter your Electronic Signature, and choose one of the following status options:                             <ul style="list-style-type: none"> <li>• <b>Complete</b> – 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.</li> <li>• <b>Complete &amp; Quit</b> – 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.</li> </ul> </li> </ul>	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"> <li>• Click  Sign Off. The Sign Off on Collaboration window will appear.</li> <li>• Enter your Electronic Signature, and choose one of the following status options:                             <ul style="list-style-type: none"> <li>• <b>Complete</b> – 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.</li> <li>• <b>Complete &amp; Quit</b> – 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.</li> </ul> </li> </ul>						
Collaboration Leader	Proceed to Step 2 after the designated due date for redlines.						

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## Collaborating in MasterControl, Continued

### Signing off (continued)

Step	Action
2	<ul style="list-style-type: none"> <li>Review redlines by clicking the View Changes  icon under <b>Collaboration Actions</b>.</li> <li>Modify/accept all changes in the document, click <b>Save As</b>, and close the document.</li> </ul>
3	In <b>Collaboration Actions</b> , click the Upload Changes  icon to upload your modification/acceptance to the document.
4	<ul style="list-style-type: none"> <li>Under <i>Actions</i>, click the <b>Details</b>  icon (blue 'puzzle piece' icon). The <b>Packet Item Details</b> window will appear.</li> <li>Review and enter/modify the <b>Change Description and Reason for Change</b> and click <b>Save</b>.</li> </ul>
5	In the <b>Collaboration Workspace</b> tab under <i>Actions</i> , click the <b>Replace File</b>  icon. The <b>Replace InfoCard Main File</b> window will appear.
6	<ul style="list-style-type: none"> <li>To replace the main file attached to the InfoCard,               <ol style="list-style-type: none"> <li>check the box <b>Use Latest Redline</b> if submitting the final acceptable document for approval that went through the redline process, or</li> <li>browse for a specific file without the redlines in the <b>Select File</b> field, and</li> <li>click <b>Load File</b>. A message 'Replacing InfoCard main file was successful' will appear.</li> </ol> </li> <li>Repeat Steps 2-6 for all InfoCards in the task.</li> </ul>
7	<ul style="list-style-type: none"> <li>Click Sign Off . The <b>Sign Off on Collaboration:</b> window will appear.</li> <li>Enter your comments, if any, your <b>User ID</b> and <b>Electronic Signature</b></li> </ul>
8	<p>Select one of the following Status options that may appear from the drop down menu, and click <b>Save</b>.</p> <ul style="list-style-type: none"> <li><b>End Collaboration</b> - This will end the collaboration and move the packet into the next route step.</li> <li><b>End Collaboration and Launch Route</b> – This will end the collaboration and move the packet into the next route step.</li> <li><b>Abort Collaboration</b> – This will abort or end the collaboration completely and permanently, and the packet will return to the initiator's <b>Start Task</b>.</li> </ul>

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## Collaborating in MasterControl, Continued

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

- MasterControl Suite 10.1.x Online Help
  - MasterControl Manual
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**Controlled Documents** The following controlled documents support this procedure.

Procedure
General Use of MasterControl

Reference
Quick Start Guide for Creator-Reviser Level Access
Quick Start Guide for Reader Level Access

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**Author** Emeline Santos, SCPMG Quality Assurance Coordinator

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