



# KAISER PERMANENTE®

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<b>DOCUMENT TITLE:</b> Revising a Document in MasterControl
<b>DOCUMENT NOTES:</b>

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<b>AUTHOR:</b> K082273	<b>PREVIOUS NUMBER:</b>
<b>OWNER:</b> K083442	<b>CHANGE NUMBER:</b> SCPMG-CR-0221

## Revising a Document in MasterControl

**Purpose** This procedure provides instructions for revising 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 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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## Revising a Document 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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## Revising a Document in MasterControl, Continued

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### 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.

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## Revising a Document in MasterControl, Continued

### Revising a document with major revisions


**Notes:**

A major change affects the intent or function of the document such as:

- A change in regulations or policies
- Adding, modifying, or deleting data or information
- A change in instruments that will affect the procedure and the way the test is performed
- A critical change of a test, e.g., a change in temperature or testing method
- Major content revisions of any existing document

### Sign Off > New Packet Task

Follow the steps below to send a revision document change request for approval.

Step	Action
1	Log onto MasterControl, enter your User ID and Login password.
2	Click <b>Documents</b> , perform a document search, and open the document InfoCard that needs revision.
3	Click  <b>Sign Off</b> and select <b>New Packet Task</b> from the dropdown menu. The <b>Start Task</b> screen will open.

### Sending a document InfoCard for approval

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

Step	Action
1	In the <b>Task Information</b> section, enter a <b>Task Name</b> .  <i>Note:</i> <i>If revising a single document, it is recommended to enter the title (or an abbreviated version) of the document.</i>

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## Revising a Document in MasterControl, Continued










### Sending a document InfoCard for approval (continued)

Step	Action
2	<p>Optionally, in the <b>Task Information</b> section, enter applicable instructions in the <b>Instructions</b> 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>
3	<ul style="list-style-type: none"> <li>• In the <b>Route Information</b> section, select the appropriate Route Name from the dropdown list.</li> </ul> <p><i>Note:</i>  <i>There may only be a single option from the dropdown menu.</i></p> <ul style="list-style-type: none"> <li>• Ensure that the appropriate route is selected by reviewing the <b>Route Description</b> with the <b>Available Route Steps</b> that will appear after selecting the Route Name.</li> </ul>
4	<p>In the <b>Change Request Information</b> section, enter the <b>Proposed Changes</b> (what you are changing) and <b>Reason for Change</b> (why you are changing).</p>
5	<p>Optionally, in the <b>Task Contents</b> + 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>
6	<p>Optionally, in the <b>Task Options</b> + 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 <b>Instructions</b> field if attaching supporting information and/or adding supporting InfoCard links.</i></p>

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## Revising a Document in MasterControl, Continued

### Sending a document InfoCard for approval (continued)


Step	Action						
7	<p>Launch the Packet Task now or at a later date.</p> <table border="1"> <thead> <tr> <th>If you wish to launch the packet task...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Now</td> <td>Click  <b>Launch Task</b>.</td> </tr> <tr> <td>At a later date</td> <td> <ul style="list-style-type: none"> <li>Click the <b>Save</b>  button to save the task and launch at a later time.</li> <li>Launch the saved task later by going to <b>My MasterControl</b>, click <b>Start Task</b>, and click <b>Packets</b>.</li> <li>Under Actions, click the launch  icon of the packet task you want to launch.</li> </ul> </td> </tr> </tbody> </table> <p><b>Note:</b>                      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  <b>Launch Task</b> .	At a later date	<ul style="list-style-type: none"> <li>Click the <b>Save</b>  button to save the task and launch at a later time.</li> <li>Launch the saved task later by going to <b>My MasterControl</b>, click <b>Start Task</b>, and click <b>Packets</b>.</li> <li>Under Actions, click the launch  icon of the packet task you want to launch.</li> </ul>
If you wish to launch the packet task...	Then...						
Now	Click  <b>Launch Task</b> .						
At a later date	<ul style="list-style-type: none"> <li>Click the <b>Save</b>  button to save the task and launch at a later time.</li> <li>Launch the saved task later by going to <b>My MasterControl</b>, click <b>Start Task</b>, and click <b>Packets</b>.</li> <li>Under Actions, click the launch  icon of the packet task you want to launch.</li> </ul>						

### 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 <b>My Tasks</b> in the <b>My MasterControl</b> 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 <b>Change Request</b>  . The <b>View Task</b> page will appear.

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## Revising a Document in MasterControl, Continued

### Approving Change Request Step Change Request Step (continued)

Step	Action						
3	Review the <b>View Packet</b> details that include information on: <ul style="list-style-type: none"> <li>• Any Instructions, Proposed Changes and Reason for Change</li> <li>• The <b>Task Contents</b>  section:               <ul style="list-style-type: none"> <li>• Click the <b>View Document</b>  or  icon to open and review the document.</li> <li>• Click the <b>View InfoCard</b>  icon to open and review the InfoCard in the <b>Document InfoCard</b> screen.</li> </ul> </li> <li>• Any other information and attachments pertaining to the packet.</li> </ul>						
4	Click <b>Sign-Off</b>  to approve or reject the packet. The <b>Sign Off Task:</b> window will appear.						
5	Select the appropriate <b>Status</b> from the dropdown menu. <table border="1" data-bbox="565 934 1393 1411" style="margin-left: 20px;"> <thead> <tr> <th data-bbox="565 934 893 976">If the packet is...</th> <th data-bbox="893 934 1393 976">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="565 976 893 1123">Approved</td> <td data-bbox="893 976 1393 1123">               The <b>Collaboration Packet Actions</b> window will appear.               <ul style="list-style-type: none"> <li>• Select <b>Native</b>.</li> <li>• Click <b>Continue</b>.</li> </ul> </td> </tr> <tr> <td data-bbox="565 1123 893 1411">Rejected</td> <td data-bbox="893 1123 1393 1411">               Your comment <b>must</b> be entered in the <i>Comments</i> section as to the reason for the rejection, and click <b>Save</b>.                  <i>Note:</i>                The rejected packet is returned to the initiator's <b>Start Task</b>.             </td> </tr> </tbody> </table>	If the packet is...	Then...	Approved	The <b>Collaboration Packet Actions</b> window will appear. <ul style="list-style-type: none"> <li>• Select <b>Native</b>.</li> <li>• Click <b>Continue</b>.</li> </ul>	Rejected	Your comment <b>must</b> be entered in the <i>Comments</i> section as to the reason for the rejection, and click <b>Save</b> .  <i>Note:</i> The rejected packet is returned to the initiator's <b>Start Task</b> .
If the packet is...	Then...						
Approved	The <b>Collaboration Packet Actions</b> window will appear. <ul style="list-style-type: none"> <li>• Select <b>Native</b>.</li> <li>• Click <b>Continue</b>.</li> </ul>						
Rejected	Your comment <b>must</b> be entered in the <i>Comments</i> section as to the reason for the rejection, and click <b>Save</b> .  <i>Note:</i> The rejected packet is returned to the initiator's <b>Start Task</b> .						


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## Revising a Document in MasterControl, Continued

### Opening the Collaboration Packet

Follow the steps below to open the collaboration packet.

Step	Action						
1	Click on <b>My Tasks</b> .						
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 <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 <input type="checkbox"/> icon to exit out of the window. The <b>Collaboration Workspace</b> screen will appear</li> </ul>						
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="568 1098 1401 1396"> <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>Collaborator</td> <td> <ol style="list-style-type: none"> <li><b>Collaborating and redlining</b></li> <li><b>Signing off Collaboration</b></li> </ol> </td> </tr> <tr> <td>Collaboration Leader</td> <td> <ol style="list-style-type: none"> <li><b>Collaboration Leader Only – Adding and/or deleting users</b></li> <li><b>Collaborating and redlining</b></li> <li><b>Signing off Collaboration</b></li> </ol> </td> </tr> </tbody> </table>	If you are a...	Then follow <b>in order</b> the procedure blocks for...	Collaborator	<ol style="list-style-type: none"> <li><b>Collaborating and redlining</b></li> <li><b>Signing off Collaboration</b></li> </ol>	Collaboration Leader	<ol style="list-style-type: none"> <li><b>Collaboration Leader Only – Adding and/or deleting users</b></li> <li><b>Collaborating and redlining</b></li> <li><b>Signing off Collaboration</b></li> </ol>
If you are a...	Then follow <b>in order</b> the procedure blocks for...						
Collaborator	<ol style="list-style-type: none"> <li><b>Collaborating and redlining</b></li> <li><b>Signing off Collaboration</b></li> </ol>						
Collaboration Leader	<ol style="list-style-type: none"> <li><b>Collaboration Leader Only – Adding and/or deleting users</b></li> <li><b>Collaborating and redlining</b></li> <li><b>Signing off Collaboration</b></li> </ol>						

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## Revising a Document 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="548 779 1393 940"> <thead> <tr> <th data-bbox="548 779 971 821">If ...</th> <th data-bbox="971 779 1393 821">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="548 821 971 894">No users are to be added/deleted</td> <td data-bbox="971 821 1393 894">Proceed to procedure block <b>Collaborating and redlining.</b></td> </tr> <tr> <td data-bbox="548 894 971 940">Users are to be added/deleted</td> <td data-bbox="971 894 1393 940">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 &gt; Add Step User arrow.</li> <li>• Click the &lt; 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 &lt; Remove Step User icon.</p>						

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## Revising a Document 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>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.</li> </ul> <p><i>Notes:</i></p> <ul style="list-style-type: none"> <li><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.</i></li> <li><i>If the browser window becomes blank, refer to the <b>Opening the Collaboration Packet</b> block to return to the <b>Collaboration Workspace</b>.</i></li> </ul>
2	Depending on the Microsoft Word version, click <b>Enable Editing</b> and/or enable <b>Track Changes</b> in Microsoft Word after opening the file, 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.
4	Close the document.

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## Revising a Document in MasterControl, Continued

### Collaborating and redlining (continued)









Step	Action
<b>Uploading the Redlined InfoCard File</b>	
5	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.
6	<ul style="list-style-type: none"> <li>• Click <b>Browse</b>, locate the file in your computer, click <b>Open</b>, and click <b>Load File</b>.</li> <li>• Repeat Steps 4 and 5 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> </ul>
7	Under <b>Collaboration Actions</b> , click  <b>View Changes</b> . The <b>View Redlines</b> window will appear. <ul style="list-style-type: none"> <li>• Click  <b>View Redlines</b> to open the document, and confirm that your redline was uploaded.</li> <li>• Delete the file from your computer.</li> <li>• Repeat this step for all InfoCards in the task.</li> </ul>

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## Revising a Document in MasterControl, Continued

### Collaborating and redlining (continued)

Step	Action						
<b>Revision History and Collaboration Comments</b>							
8	<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><b>Important Notes:</b></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 and will be used to verify the revision history for future inspections.</li> </ul>						
9	<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" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th style="text-align: left;">If you are a...</th> <th style="text-align: left;">Then...</th> </tr> </thead> <tbody> <tr> <td style="vertical-align: top;">Collaborator</td> <td>Proceed to procedure block <b>Signing off Collaboration</b></td> </tr> <tr> <td style="vertical-align: top;">Collaboration Leader</td> <td> <ul style="list-style-type: none"> <li>Document the due date for redlines to other collaborators, if needed, and</li> <li>Click  <b>Return</b> 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> <li>When the packet is ready to be sent for Initial/Final approval, proceed to procedure block <b>Signing off Collaboration</b></li> </ul> </td> </tr> </tbody> </table>	If you are a...	Then...	Collaborator	Proceed to procedure block <b>Signing off Collaboration</b>	Collaboration Leader	<ul style="list-style-type: none"> <li>Document the due date for redlines to other collaborators, if needed, and</li> <li>Click  <b>Return</b> 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> <li>When the packet is ready to be sent for Initial/Final approval, proceed to procedure block <b>Signing off Collaboration</b></li> </ul>
If you are a...	Then...						
Collaborator	Proceed to procedure block <b>Signing off Collaboration</b>						
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## Revising a Document 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>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. <i>It is recommended to communicate with other team members regarding possible edits prior to unlocking.</i></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="565 1108 1399 1705"> <thead> <tr> <th data-bbox="565 1108 792 1150">If you are a...</th> <th data-bbox="792 1108 1399 1150">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="565 1150 792 1621">Collaborator</td> <td data-bbox="792 1150 1399 1621"> <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 to the document.</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="565 1621 792 1705">Collaboration Leader</td> <td data-bbox="792 1621 1399 1705">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 to the document.</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 to the document.</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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## Revising a Document in MasterControl, Continued



### Signing off Collaboration Collaboration (continued)

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

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## Revising a Document 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"> <li>• 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.</li> <li>• Check the box <b>Use Latest Redline</b>, and click the <b>Load File</b> button.</li> </ul> <p><i>Note:</i>  <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.</i></p>						
6	<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> <li>• Select one of the following Status options that may appear from the drop down menu, and click <b>Save</b>.             <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> </ul> </li> </ul> <table border="1" data-bbox="534 1255 1365 1524"> <thead> <tr> <th data-bbox="534 1255 1049 1297">If the following error displays...</th> <th data-bbox="1049 1255 1365 1297">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="534 1297 1049 1409">All Infocards in collaboration require the Change description and Reason for Change fields to be populated.</td> <td data-bbox="1049 1297 1365 1409">Fill in the fields per Step 4 above.</td> </tr> <tr> <td data-bbox="534 1409 1049 1524">The main files on the following InfoCards are older than the latest redline.</td> <td data-bbox="1049 1409 1365 1524">Update the final file per Step 5 above.</td> </tr> </tbody> </table> <ul style="list-style-type: none"> <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>	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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## Revising a Document 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 <b>Tracking</b> in the <b>My MasterControl</b> page.
2	Click the <b>Search</b> button, and click the <b>Basic</b> tab.
3	The following search criteria (among others) are available: <ul style="list-style-type: none"> <li>• <b>Task Name:</b> Useful for looking for a specific packet</li> <li>• <b>User ID:</b> Useful for looking for all of the packets you initiated.</li> <li>• <b>Route Name:</b> Useful for looking for all packets for a department.</li> </ul>
4	<ul style="list-style-type: none"> <li>• Click the <b>Submit Search</b> button.</li> <li>• Click the <b>Details</b>  icon (blue ‘puzzle piece’ icon) under the far-right <b>Action</b> column.</li> <li>• Scroll down to the 3-Initial Approval and 4-Final Approval sections.</li> </ul>

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

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

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## Revising a Document in MasterControl, Continued

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

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

Procedure
General Use of MasterControl
Approving Documents in MasterControl

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

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