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SCPMG Laboratory Systems Electronic Document Management System

QuickStart Guide for Creator-Reviser Level Access

PORTAL & DOCUMENTS

1. How do I Log In and Log Out of MasterControl?

Logging In:

- Open Internet Explorer, then open **MasterControl Portal** login page by clicking the appropriate bookmark in the **Favorites** menu:

<https://kpscal.mastercontrol.com/MasterControl/login/>

First-time login: User ID is **NUID** (e.g., **G837569**), and Password is **NUID + 1** (e.g., **G8375691**)

Note: Your **Login Password** is the same as your **E-Signature**.


- In the **User ID** field, type in your **NUID**.
- Type in your login password in the **Login Password Field**, then click **Login** (remember: passwords are case-sensitive).

Note: If you have forgotten your password, click on **Forgot your password?** link. Security questions must be defined in MC prior to using this feature. See Item 2 for more information.

Logging Out:


- The **Log Out** link appears in the upper right hand corner of the screen next to your name.
- Click on the link to exit out of MasterControl.

2. How do I Set up My Security Questions?

- In the **My MasterControl** section on the left of the screen, place cursor over **My Settings**.
- Click on **Security Questions**.
- Answer at least three of the eight questions.
- Click on **Save** 

Note: MasterControl will prompt you to setup your security questions upon initial login.


3. How do I Change My Password?

- In the **My MasterControl** section on the left of the screen, place cursor over **My Settings**.
- Click on **Change Passwords**.
- Enter your **Current Login Password** (must be new, have at least 4 characters, 1 letter, and 1 number).
- Enter your **New Login Password**.
- Re-enter **New Login Password** for confirmation.
- Click on **Save** 

4. What do I do if I Forget My Password ?

- From the login screen, click on **Forgot your password?**
- The system will ask you for your **User ID** and **E-mail Address** – enter them and click **Submit**.
- The system will then ask you to answer one of the security questions you defined for identity verification.
- You will be e-mailed a new one-time use password and when logging in using it, you will be prompted to change your password.


5. How do I Set My Out of Office Settings?

- In the **My MasterControl** section on the left of the screen, place cursor over **My Settings**.
- Click on **Out of Office**. In the **Out of Office Status** section, select **Out of the Office**.
- Select an **Alternate user** to receive your tasks .
- Under **Redirect these incoming tasks to Alternate** choose one of the following options:
 - All Tasks:** This will send all new tasks to your Alternate.
 - Selected Tasks:** This will open the window below to allow you to select specific tasks instead of all tasks.
- Click on **Save** 

6. How do I Find and View a Document?

- In the **My MasterControl** section on the left of the screen, click on **My Organizers**.
- From the **My Organizers** window, click on the name of the **Organizer** you would like to expand.
- Continue to expand each sub-folder until you find the document you would like to view.
- Click on the document name to view the document.

7. Alternate Option for Finding a Document

- On the **MasterControl Portal Home Page**, place cursor over the **Documents** folder on the left.
- In the drop-down menu, click on **Documents**.
- Click on the **Search** icon  **Search** located under the **MasterControl Documents > Document InfoCard** heading.
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


Alternate Option for Finding a Document, continued

- d. Choose one of the following methods to execute your search:
- **Simple** – The Simple Search allows you to query for a value that might appear anywhere on the Document InfoCard.
 - **Basic** – The Basic Search provides dropdown menus of specific fields contained on the Document InfoCard. These fields can be searched together to provide a more tailored results list.
 - **Advanced** – The Advanced Search provides a dropdown which contains each field on the InfoCard. Advanced Searches can be performed on multiple data fields from the InfoCard.
- e. Enter or select a value (or values) in the appropriate search field(s) and click on **Submit Search**.



8. How do I Create a New Document InfoCard?

- a. On the left side of the **MasterControl Portal Home Page**, click on **Documents**.
- b. Click on the **Create a New Document** folder icon.
- c. Select the appropriate document **InfoCard Type** for your location. Refer to **InfoCard Type Reference Chart** to assist you in your selection.
- d. If necessary, select the appropriate Subtype for your department and click on the **Continue** button.
- e. In the Document InfoCard screen, enter the **Title** of the document.
- f. Enter **Notes** (optional).
- g. If the **Author** is someone other than yourself, click on the  icon next to **Author**, scroll down, highlight the correct name, and click **OK**. Click on the  icon next to **Owner** and scroll to highlight the owner's role instead of the owner's name, and click **OK**.
- h. Under **Main File**, click on the  icon. The **Add InfoCard Document File** window will appear.
- i. Click on the **Browse** button, locate the document file on your PC, highlight the name, and click **Open**. The file name will appear in the File Name window. Click **Load File**.
- j. Click the **Custom Fields** tab and choose the value associated with the InfoCard in the Value drop down menu.
- k. Review all information for accuracy, then click on **Save**.

9. How do I Route a Document InfoCard for Approval?

- a. Open the document InfoCard you would like to send out for approval. You may search for the document InfoCard by clicking on **Documents** and the **Search for Documents** folder.
- b. Click on the **View InfoCard** icon  to view the document InfoCard. The **Document InfoCard** screen will appear.
- c. Click on the  icon in the InfoCard you are sending for approval and select **New Packet Task**. The **Packet Types** window will appear.
- d. Under **Advanced Packets**, the system will automatically preselect by highlighting the appropriate packet type. Click on **Continue**, and the **Start Task** window will appear.
- e. In the **Task Information** section, enter a **Task Name** and any **Instructions**.
- f. In the **Route Information** section, select and click on the appropriate **Route Name** from the dropdown list.
- g. Enter the required **Change Request Information**.
- The InfoCard is automatically added to the task.
 - You can add additional InfoCards to the task by clicking on the  icon next to **Task Contents**, performing the applicable InfoCard search, submitting the search, and retrieving the appropriate InfoCard(s).
- h. **Important!** In the **Task Options** field, click the **Validation** tab, and select the appropriate radio dial. If validation is not required, enter a mandatory comment in the **Justification** box.
- i. Do one of the following:
- Click on the **Save** icon  to save the packet for launch at a later date (using **Master Control Portal > Start Task**), or
 - Click on the **Launch Task**  icon to send the packet on the selected route.

10. How do I Approve a Packet?

- a. In the **My MasterControl** section on the left side of the **MasterControl Portal Home Page**, click on **My Tasks**.
- b. Under **Task Name**, select the packet that has the '**New Document or Change Request**' **Step Name** you would like to review, and click on the **Change Request**  icon. The **View Task** page will appear.
- c. Review the **View Packet** details, e.g., instructions, changes.
- d. In the **Task Contents**  section, review the **document** and the **InfoCard**.
- e. Click on the **Sign-Off** icon  to approve or reject the packet. The **Sign Off Task** window will appear. Proceed.

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11. How does a Collaboration Leader Start Collaboration?

- a. 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.
- b. It is not recommended to have more than one Collaboration Leader and/or have an Add Only user in collaboration.
- c. If it is determined that a collaborator is to be added and/or deleted, click the *Modify step* icon, click *Save*, enter your comments in the *Change Reason* window, and click *Save*.
- d. Click the *Collaborate* icon to open the **Collaboration Workspace** window.
- e. Click on the *Edit File* icon. If the document is locked, click the *Unlock* icon.
- f. Enable Editing and/or Track Changes, make the necessary changes to the document, click *Save As*, save the file to your PC Desktop, and close the document.
- g. Click on the *Upload Changes* icon, click *Browse*, locate and highlight the file on your PC, click *Open*, and click *Load File*.
- h. Under *Actions*, click on the *Details* icon. The *Packet Item Details* window will appear. Enter the *Change Description* and *Reason for Change*, and click on *Save*.
- i. Click the *Comments* icon to document comments and instructions to other collaborator(s), and click *Save*.
- j. Document the due date for redlines to other collaborators, if needed, and click the *Return* tab.
- k. Check other collaborators' progress and comments by clicking the *Tracking* icon under *Actions* in your My Tasks screen.
- l. To End Collaboration after the due date for redlines, see **How does a Collaboration Leader End Collaboration?**

12. How do I Collaborate as a User Only?

- a. In the **My MasterControl** section on the left side of the **MasterControl Portal Home Page**, click on **My Tasks**.
- b. Click on the *Collaborate* icon for the designated task.
- c. In the **Collaboration Workspace** tab, unlock document () if necessary, then click on the *Edit File* icon.
 - Enable Editing and/or enable **Track Changes**.
 - Add your changes to the document. Click **Save As** and save the file to your **PC Desktop**. Close the document.
- d. Return to **Collaboration Actions** to upload your changes.
- e. Click on the icon. The **Add Collaboration Redline** window will appear. Click **Browse**, locate the file on your PC, highlight the file, click **Open**, then click **Load File**.

- f. Under *Actions*, click on the *Details* icon. The *Packet Item Details* window will appear. Enter the *Change Description* and *Reason for Change*, and click on *Save*.
- g. Click the *Comments* icon to document instructions and/or comments to other collaborators before signing off. Click the *Save* button.
- h. Click on icon to sign off on the task (unlock document if needed). Enter your **Electronic Signature** and choose either **Complete** (this means that you would like the task to return to you if someone else makes any redlines) -or- **Complete & Quit** (this means that you do not want the task returned to you if someone else makes changes).

13. How does a Collaboration Leader End Collaboration?

- a. The Leader can end the collaboration at any time by clicking on the *Sign-Off* icon, whether or not other collaborators have looked at the document.
- b. Leaders are responsible for submitting the final document without the redlines for approval.
- c. Review redlines by clicking the *View Changes* icon under **Collaboration Actions**.
- d. Modify/accept all changes in the document, click *Save As*, and close the document.
- e. In **Collaboration Actions**, click the *Upload Changes* icon to upload your modification/acceptance to the document.
- f. Under *Actions*, click on the *Details* icon. Review and enter/modify the *Change Description* and *Reason for Change* and click *Save*.
- g. In the **Collaboration Workspace** tab under *Actions*, click the *Replace File* icon.
- h. To replace the main file attached to the *InfoCard*, check the box **Use Latest Redline** if submitting the final acceptable document for approval that went through the redline process, or browse for a specific file without the redlines in the *Select File* field, and click *Load File*.
- i. Click on the *Sign-Off* icon. The *Sign Off on Collaboration* window will appear. Enter *Comments*, if any, your *User ID* and *Electronic Signature*.

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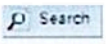
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How does a Collaboration Leader End Collaboration?, continued

- j. Choose one of the following options:
 - **End Collaboration** – This will end the collaboration and move the packet into the next route step.
 - **Abort Collaboration** – This will end the collaboration completely and permanently, and the packet will return to **Start Task**.
 - **End Collaboration and Launch Route** – This will end the collaboration and move the packet into the next route step.


14. How do I Track the Progress of a Task?




- a. In the **My MasterControl** section on the left of the screen, click on **Tracking**.
- b. Click on the **Search** button .
- c. Enter your search criteria (e.g., **Simple, Basic, Advanced**) and click on **Submit Search**.

15. What do I do if my Packet/Task is Rejected?


- a. If your packet is rejected by another user in the approval route, MasterControl will automatically return the task to your **My Tasks** inbox in the **My Master Control** section on the **Home Page**.
- b. To proceed, click on **My Tasks**.
- c. Click on the **Collaboration** icon for the rejected packet.
- d. **Rejection Comments** will be listed in **Comments**.
- e. Make changes/redlines, as needed.
- f. Signoff by choosing **End Collaboration**. The packet will re-launch on its original approval route.

16. Performing Periodic Document Review


- a. MasterControl will automatically launch a document review at a prescribed time from the last review date.
- b. Each user designated as a reviewer will be notified by e-mail, and will have the applicable task appear in their **My Tasks** inbox.
- c. In the **My MasterControl** section on the left of the **MasterControl Portal Home Page**, click on **My Tasks**, and locate the document with the review task.
- d. Click on the **Sign-Off**  icon. The **Task Details: Review:** window will appear.

- e. View any instructions, open and review the document by clicking on  or . **Note:** When a pdf is opened, a coversheet will always appear as the first page.
- f. Close the document after review.
- g. Click on the **Sign-Off** icon . The **Sign Off Task: Review:** window will appear.
- h. Enter any **Comments** you would like to document, your **User ID**, and your **Electronic Signature**.
- i. Select the appropriate **Status** from the dropdown menu.
 - If **Reviewed** is selected, the document will be issued a new effective review date.
 - If **Needs Update** is selected, a collaboration task will auto-launch and will appear in the document author/owner's **My Tasks** inbox as a **Revision** task.
- j. Click on **Save**.

17. How do I Manually Launch a Review Packet?

- Note:** Any user in a creator-reviser role and with access rights to the vault in which a document is located can manually launch a review task packet.
- a. Click on **Documents**, initiate a **Search**, and open the document **InfoCard** for which you are launching a review.
 - b. Click on the **Sign Off** icon , and select **Review Task** from the drop down list. The message 'The review task was launched.' will appear.

18. How do I Archive a Document in MasterControl?

- a. Click on **Documents**, then initiate a **Search** for the document you want to archive, and open the **InfoCard**.
- b. Click on the **Sign Off** icon  and select **Quick Approve**. The **Quick Approval** screen will appear.
- c. Enter any comments, and click on **Show Dates**.
- d. Enter the Expiration Date of the document, your **User ID** and your **Electronic Signature**. Click on **Submit**.

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



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19. How do I Revise a Document in MasterControl

- A revision is from a document reviewer who marked "Needs Update" during a document review process:
Follow the instructions in A – Revision: Task
- A revision is **NOT** from a document reviewer who marked "Needs Update" during a document review process:
Follow the instructions in B – Sign Off > New Packet Task

A – Revision: Task

- If a revision is from a document reviewer who marked "Needs Update" during a document review process, then a one-step revision collaboration task (**Revision: task**) and a new InfoCard revision is automatically created by the system.
- a. Open the **Revision: task**. The **Collaboration Workspace First-Time Help** window will appear.
 - Click the Close  icon to exit out of the window.
 - Make your changes to the document by clicking the **Edit File**  icon. If the document is locked, click the **Unlock icon**  to access the **Edit File**  icon.
 - Enable **Track Changes** (or **Enable Editing**) in Word., add your changes to the document, click **Save As** and save the file to your **PC Desktop**. Close the document.
- b. Return to **Collaboration Actions** to upload your changes.
 - Click on the **Upload Changes**  icon. The **Add Collaboration Redline** window will appear. Click **Browse**, locate the file on your PC, highlight the file, click **Open**, then click **Load File**.
 - Upload the document by clicking **Replace File**  icon.
 - To replace the main file attached to the InfoCard, check the box **Use Latest Redline** if submitting the final acceptable document for approval that went through the redline process, or browse for a specific file without the redlines in the **Select File** field, and click **Load File**.
 - Click on the **Sign-Off**  icon. The **Sign Off on Collaboration** window will appear. Enter **Comments**, if any, your **User ID** and **Electronic Signature**.
 - Select Status option **End Collaboration** and click **Save**.

- c. **Sending a Revised Document for Approval:** Follow the instructions in **Step 9** on Page 2 of this Guide.
- d. **Approving the Change Request Packet for a Revised Document:** Follow the instructions in **Step 10** on Page 2 of this Guide, proceeding to **Collaboration**.

B – Sign Off > New Packet Task

- A new InfoCard revision is not created by the system.
- A revision document change request will need to be sent for approval.
- a. **Sending a Revision Document Change Request for Approval:** Follow the instructions in **Step 9** on Page 2 of this Guide.
- b. **Approving the Change Request Packet for a Document Revision:** Follow the instructions in **Step 10** on Page 2 of this Guide, proceeding to **Collaboration**.