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:

QuickStart Guide for Creator-Reviser Level Access

PORTAL & DOCUMENTS

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

Logging In:

a. 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.*

b. In the **User ID** field, type in your **NUID**.

c. 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:

a. The **Log Out** link appears in the upper right hand corner of the screen next to your name.

b. Click on the link to exit out of MasterControl.

2. How do I Set up My Security Questions?

a. In the **My MasterControl** section on the left of the screen, place cursor over **My Settings**.

b. Click on **Security Questions**.

c. Answer at least three of the eight questions.

d. Click on **Save**

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

3. How do I Change My Password?

a. In the **My MasterControl** section on the left of the screen, place cursor over **My Settings**.

b. Click on **Change Passwords**.

c. Enter your **Current Login Password** (must be new, have at least 4 characters, 1 letter, and 1 number).

d. Enter your **New Login Password**.

e. Re-enter **New Login Password** for confirmation.

f. Click on **Save.**

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

a. From the login screen, click on **Forgot your password?**

b. The system will ask you for your **User ID** and **E-mail Address** – enter them and click **Submit**.

c. The system will then ask you to answer one of the security questions you defined for identity verification.

d. 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?

a. In the **My MasterControl** section on the left of the screen, place cursor over **My Settings**.

b. Click on **Out of Office**. In the **Out of Office Status** section, select **Out of the Office.**

c. Select an **Alternate** user to receive your tasks .

d. Under **Redirect these incoming tasks to Alternate c**hoose one of the following options:

• A**ll 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.

e. Click on **Save**.

6. How do I Find and View a Document?

a. In the **My MasterControl** section on the left of the screen, click on **My Organizers**.

b. From the **My Organizers** window, click on the name of the **Organizer** you would like to expand.

c. Continue to expand each sub-folder until you find the document you would like to view.

d. Click on the document name to view the document.

7. Alternate Option for Finding a Document

a. On the **MasterControl Portal Home Page**, place cursor over the **Documents** folder on the left.

b. In the drop-down menu, click on **Documents**.

c. Click on the **Search** icon located under the **MasterControl Documents > Document InfoCard** heading.

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
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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 drop-down 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 ic**on 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 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 **S**ign-Off icon . The Sign Off on Collaboration window will appear. Enter Comments, if any, your User ID and Electronic Signature.

(Continued on next page)

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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 ⌕ Search .

    c. Enter your search criteria (e.g., **Simple**, **Basic**, A**dvanced**) 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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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 **S**ign-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**.

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Maureen Ahler (K083442)	Quality Systems Leader	12 Dec 2015, 07:56:09 PM	Approved