



MASTER DOCUMENTS APPLICATION MANUAL

MMS-WQM-202

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Mireaux Management Solutions

ISO/API Consulting ■ Auditing ■ Training ■ Web QMS



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1.0 PURPOSE AND SCOPE

The Master Documents Application is a powerful, user-friendly system designed to enable Employees to access, review, and request documents, as well as enable Document Specialists/Administrators to add, edit, delete, and route new documents for approval. The purpose of this manual is to guide the users through the necessary steps to utilize the Master Documents application.

NOTE 1: Only those who have the Administrator role may perform the actions described in some sections marked ADMIN ONLY of this manual.

NOTE 2: Depending on the customization of your Web QMS, the figures shown in this manual may not coincide perfectly with your Web QMS.

2.0 TERMS AND DEFINITIONS

QMS Quality Management System

3.0 SECURITY ROLES

Administrator	Full Web QMS Administrator. This role can edit, create, or delete pages, as well as add, edit, or delete modules. Administrators can also authorize users, add roles, view the File Manager, clear Logs, and view/clear the Recycle Bin.
Document Specialist	This role is responsible for managing all documents in the Master Documents application.
Employee	This is a user who has full access to view information on Web QMS, but limited ability to add or edit documents. Employees may view document properties, open documents, and mail documents to themselves.

4.0 INSTRUCTIONS

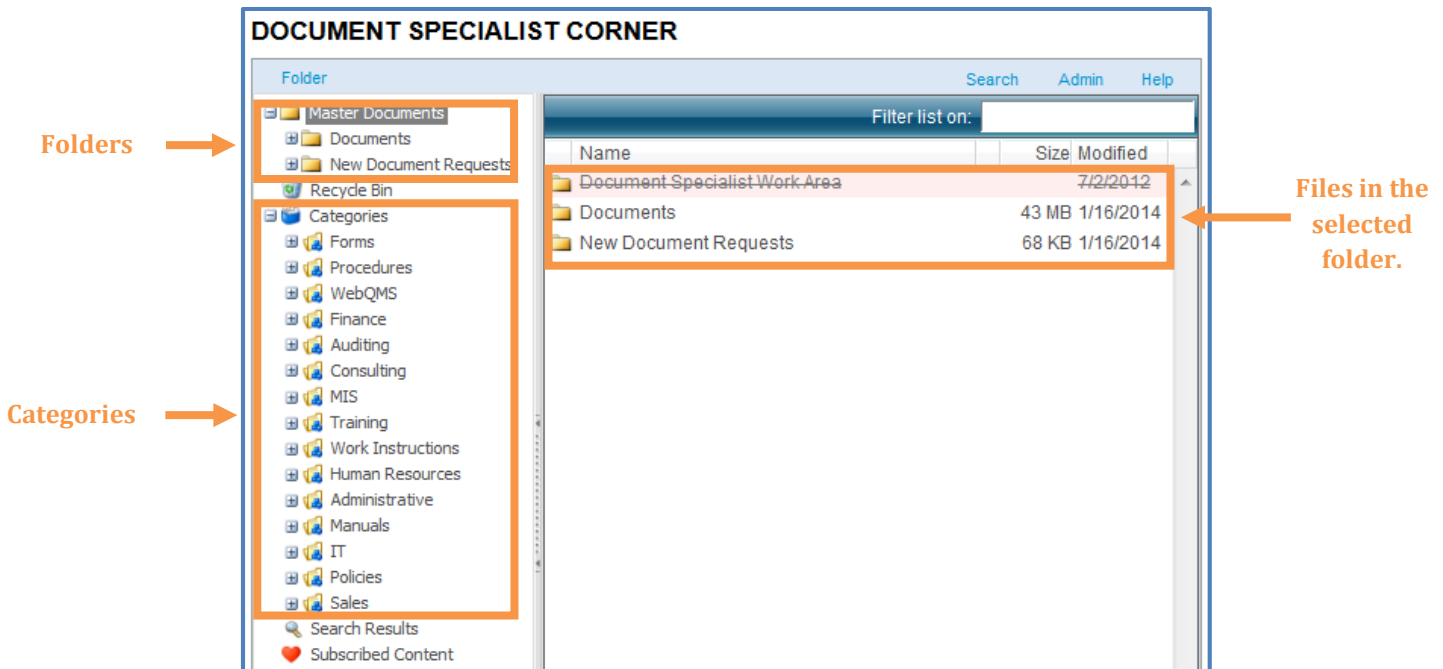
4.1 MASTER DOCUMENTS MENU

The Master Document application is located under the Document Control tab on the Top Menu of Web QMS. CLICK **Document Control** to access the application.

This is the typical screen of the Master Document application.



- **Document Request:** Users can submit request for new documents here with the ability to attach files.
- **Unreviewed Docs:** Users assigned to review documents will have access to this area.
- **Document Specialist Corner (Document Specialist):** This area is the main working area where the Document Specialist role can perform all document management functions.



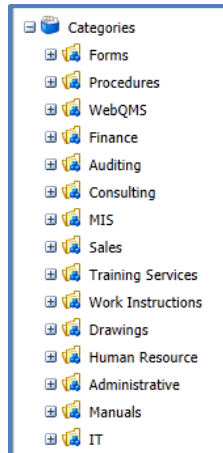
4.1.1 Folders

On the left side of the Document Specialist Corner, there are three folders we will use during the process of document control:

- **Documents:** This is the main folder where all documents are contained. In general, you will see that this folder has three (3) subfolders: Procedures, Work Instructions, and Forms. Other subfolders may also be present, such as drawings, templates, etc.
- **New Document Requests:** The documents in this folder are documents that were submitted by employees through the Document Request page.

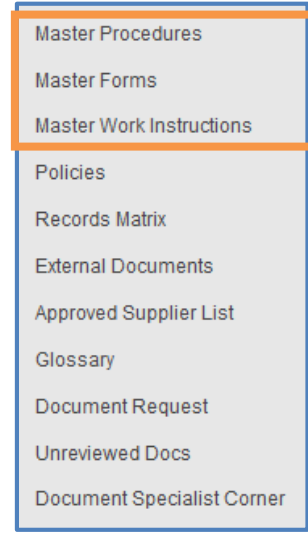
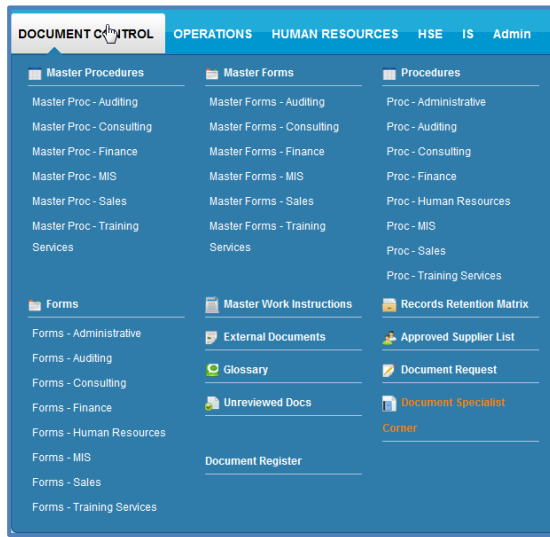
4.1.2 Categories

Below the folders, you can see a list of Categories. **CLICK** the **Plus Sign Icon** next to Categories to expand these. Categories are used to ensure documents are only displayed on the correct pages.











4.2 ACCESSING DOCUMENTS

Documents can be accessed by users in two ways: by using the Top Menu from the **Document Control** tab on the Top Menu of Web QMS or the Left Menu.

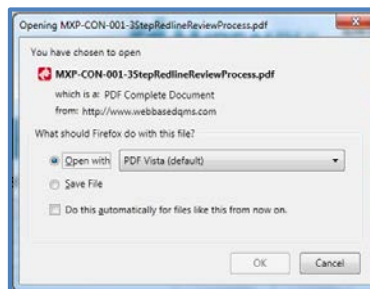


SELECT the **Document Type** (Procedures, Forms, etc.) from the Left Menu. You will a list of all documents along with their attributes.

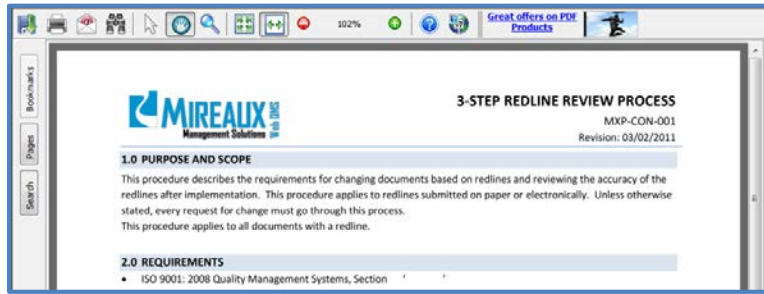
MASTER LIST OF PROCEDURES						
	Title	Document Number	Released Date	Process Owner	Management Sponsor	
	3 Step Redline Review Process	MXP-CON-001	31-Jul-2011	M. Boudreaux	M. Boudreaux	
	Documents & Record Control	MXP-ADM-001	31-Jul-2011	M. Boudreaux	M. Boudreaux	
	General Accounting Functions	MXP-FIN-001	02-Mar-2011	M. Boudreaux	M. Boudreaux	
	Human Resources	MXP-HRS-001	02-Mar-2011	M. Boudreaux	M. Boudreaux	

There are two icons next to each Document:

- The **File Type icon** to the right of the document title. CLICKING the icon displays the document's source.



- The **Info icon** to the left of the document title. CLICKING the icon displays the document properties. You can view the document By CLICKING the **Document Title** directly.



You can **CLICK** the **Info icon** to view more details about the document such as document Author, Categories, Remarks, Version History, etc.

Calibration	
Document Number	MXP-ADM-006
Release Date	Monday, December 17, 2012
Process Owner	M. Boudreaux
Management Sponsor	M. Boudreaux
Author	Amy
Created	6/2/2013 6:59 PM
Categories	Procedures, Administrative
Remarks	

Versions					
Version	Revision	Last Modified	Form Title	Size	Download
3		6/2/2013	Calibration	239.7 KB	
2		11/14/2012	Calibration	243.1 KB	
1		11/10/2012	Calibration	242.3 KB	

Calibration	
Document Number	MXP-ADM-006
Release Date	Monday, December 17, 2012
Process Owner	M. Boudreaux
Management Sponsor	M. Boudreaux
Author	Amy
Created	6/2/2013 6:59 PM
Categories	
Remarks	

Versions					
Version	Revision	Last Modified	Form Title	Size	Download
3		6/2/2013	Calibration	239.7 KB	
2		11/14/2012	Calibration	243.1 KB	

There are four icons at the top of the detail page that are available to all users:

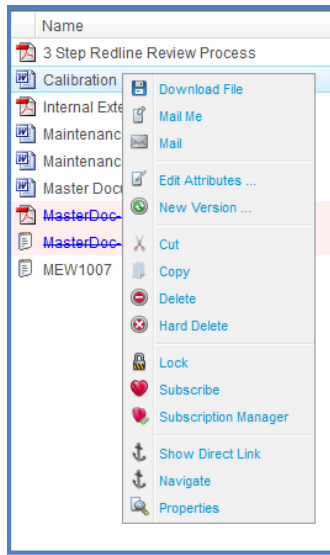
- **Download file:** Allows users to download the document.
- **Subscribe:** Notifies users of any update to this file.
- **Mail Me:** Allows users to mail the documents to themselves.
- **Copy:** Allows users to copy the document.

There are six more icons available for Admins.

- **Edit Attributes:** Allows users to change attributes, including: Type, Title, Keywords, Author, Versions to Keep, and Remarks.
- **New Version:** Allows users to Browse, select, and upload a new document version.
- **Lock:** Allows users to lock and unlock the document.
- **Hard Delete:** Allows users to delete the hard copy of the document.
- **Delete:** Allows users to delete the soft copy of the document.
- **Cut:** Allows users cut the document.

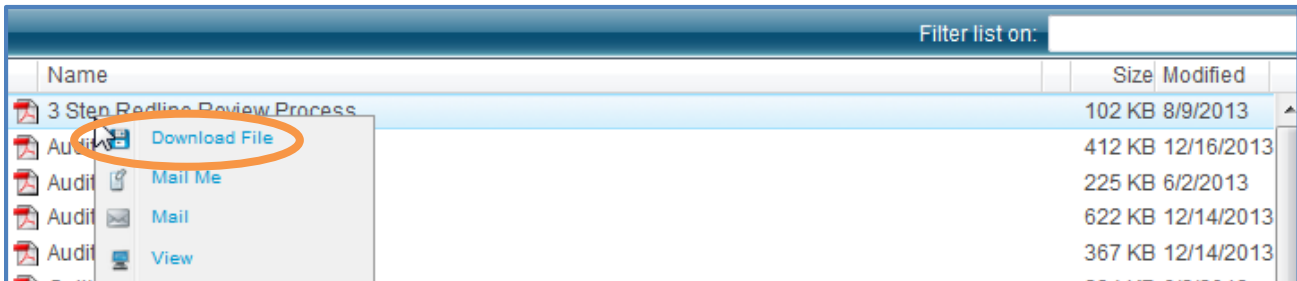
4.3 MANAGE DOCUMENT (DOCUMENT SPECIALIST ONLY)

When you wish to make changes to a file, RIGHT-CLICK the **Document Name** to expand the document menu. The document menu varies in length according to security roles. The functions include: **Download File, Mail Me, Mail, View, Edit Attributes, New Version, Cut, Copy, Delete, Hard Delete, Lock, Subscribe, Subscription Manager, Show Direct Link, Navigate, and Properties.**



4.3.1 Download File (Document Specialist Only)

To download any document, RIGHT-CLICK the **File Name** and SELECT **Download File** from the popup menu. The document will then be saved to your local computer.



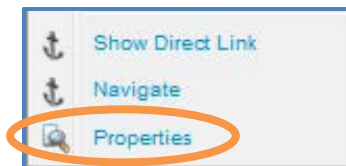
4.3.2 Mail Me a File

4.3.3 Mail a File

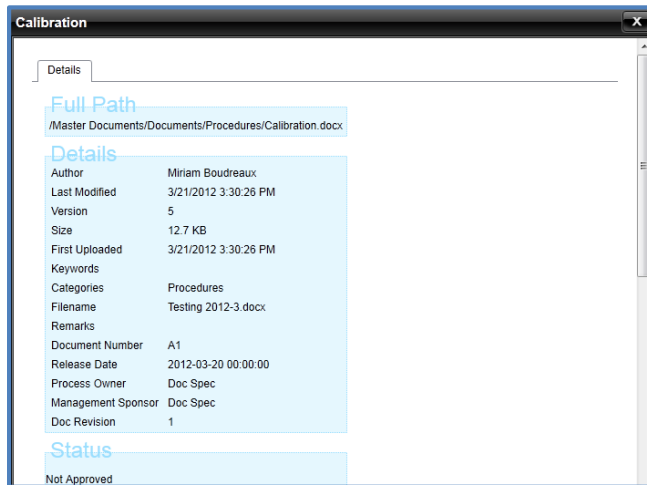
4.3.4 View a File

4.3.5 Document Information

To view the document information, SELECT **Properties** from the popup menu.

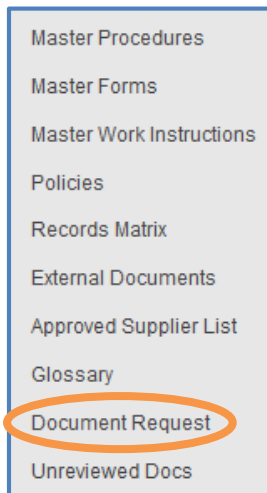


This selection is the same as the one you see, but uses the **Info** icon.

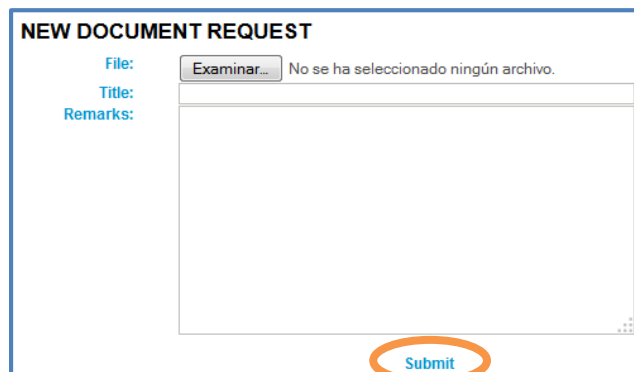


4.4 NEW DOCUMENT REQUEST

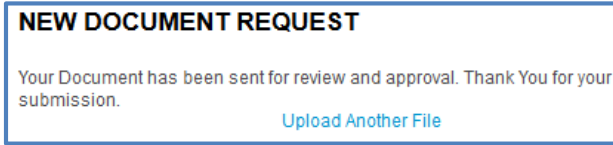
To request a new document, first **CLICK** the **Document Control** tab on the Top Menu. Next, **CLICK Document Request** from the Left Menu.



CLICK Browse to **LOCATE** the file and **SELECT** the document from your local computer.



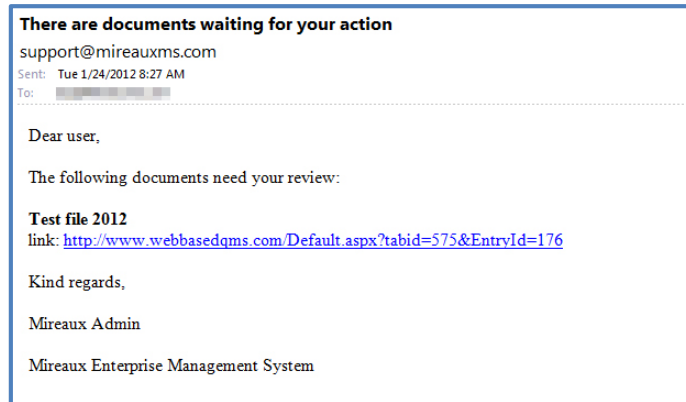
You can enter the title of the new or revised document and some remarks, if necessary, in the available fields. CLICK **Submit** when you are done. Once you CLICK **Submit**, the document will be uploaded to the Document Specialist area. You should see a confirmation message similar to the one below:



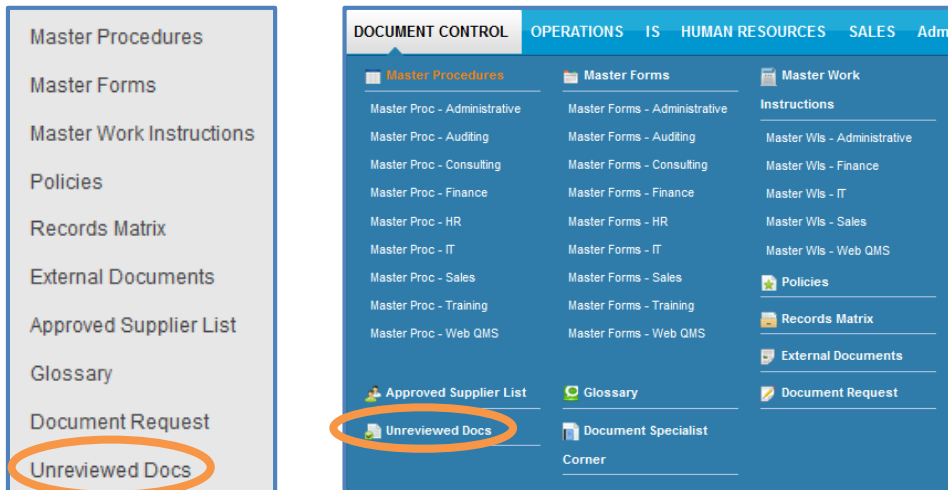
The Document Specialist will also receive a notification email letting them know about your request.

4.5 REVIEWING AND APPROVING A DOCUMENT

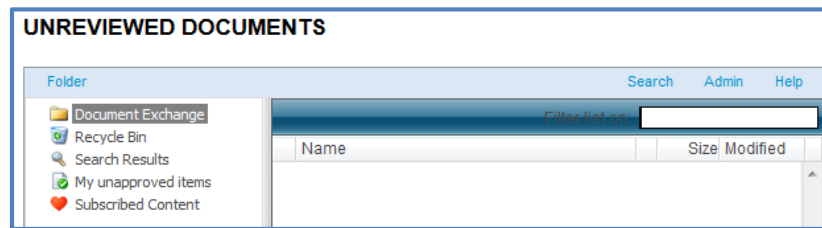
In some cases, a user may be assigned to review a document, or be given the role of Document Reviewer. In either case, the user will receive an email from the Document Specialist alerting him/her of the new document to review. The email contains a link which takes the user directly to the Reviewer Corner page, as depicted below:



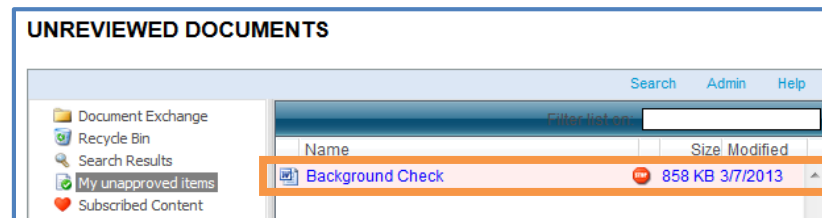
If no email was received, users can also access documents awaiting approval by CLICKING the **Unreviewed Docs** from the Left Menu or the Top Menu of the Document Control tab.



You will see a screen similar to this:



CLICK **My unapproved items** from the left pane in the Unreviewed Documents page. You will see the unapproved files listed on the right content pane.



A **Stop Sign icon** is displayed on the right of the file that is waiting for your review. The **Stop Sign icon** indicates that the status of the document is unapproved. Once you have selected the document, you can perform the following functions:

4.5.1 Review the file:

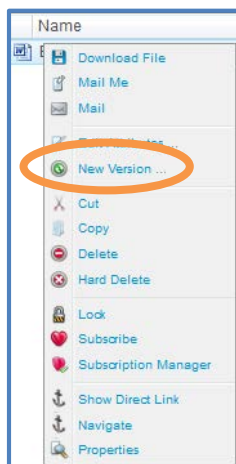
- DOUBLE-CLICK the **Document Title** and OPEN the **Document** for review.
- RIGHT-CLICK the **Document Title** and DOWNLOAD the **Document** to your local documents repository.
- RIGHT-CLICK the **Document Title** and SELECT **Mail Me** to send an email to yourself.

4.5.2 Add comments:

- RIGHT-CLICK the **Document Title** and SELECT **Edit Attributes**. Enter your review comments on the **Remarks** field.

4.5.3 Add a new version:

- If you wish to add a new document based on the file you downloaded or if you created a new file, then RIGHT-CLICK the **Document Title** and SELECT **New Version**.



CLICK **Choose File** and SELECT the newly saved file. CLICK **Next**.

UNREVIEWED DOCUMENTS

Editing: Chrysanthemum.jpg (Word Document)
Folder: Forms

Upload/Choose item

Core Metadata

Custom

Permissions

Categories

No se ha seleccionado ningún archivo.

ENTER any specific **Remarks** for the document.

Editing: Chrysanthemum.jpg (Word Document)
Folder: Forms

Upload/Choose item

Core Metadata

Custom

Permissions

Categories

Type: Word Document

Title: Background Check

Author: M. Boudreaux

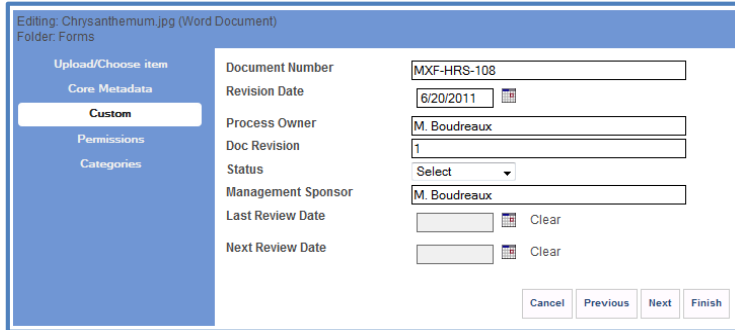
Keywords: MXF-HRS-108

Versions to keep: 1

Remarks: not good

Thumbnail: Use Thumbnail

No se ha seleccionado ningún archivo.



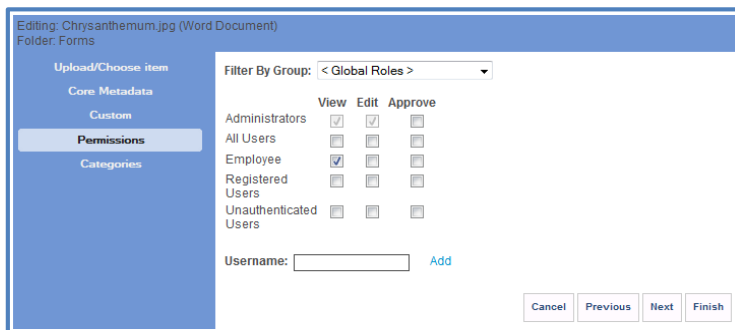
Editing: Chrysanthemum.jpg (Word Document)
Folder: Forms

Upload/Choose item
Core Metadata
Custom
Permissions
Categories

Document Number: MXF-HRS-108
Revision Date: 6/20/2011
Process Owner: M. Boudreaux
Doc Revision: 1
Status: Select
Management Sponsor: M. Boudreaux
Last Review Date: [] Clear
Next Review Date: [] Clear

Cancel Previous Next Finish

CHANGE the **Permission** and **Categories** if necessary. CLICK **Finish**.



Editing: Chrysanthemum.jpg (Word Document)
Folder: Forms

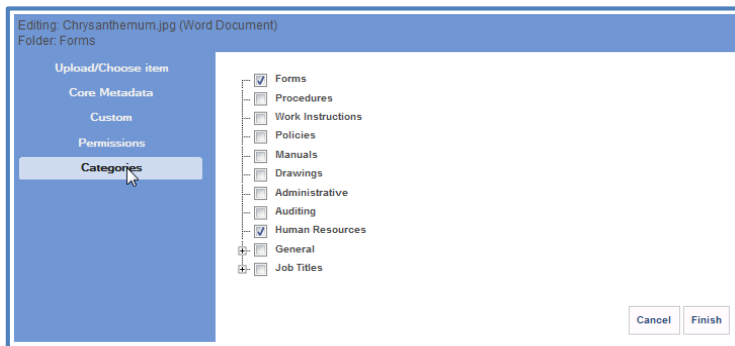
Upload/Choose item
Core Metadata
Custom
Permissions
Categories

Filter By Group: < Global Roles >

	View	Edit	Approve
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
All Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Registered Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unauthenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Username: [] Add

Cancel Previous Next Finish



Editing: Chrysanthemum.jpg (Word Document)
Folder: Forms

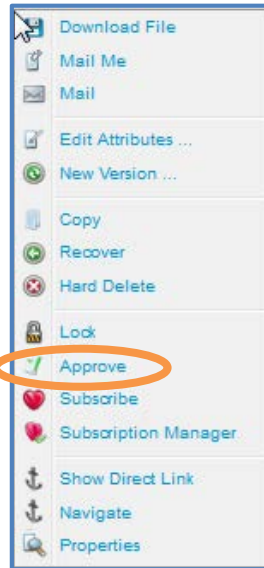
Upload/Choose item
Core Metadata
Custom
Permissions
Categories

- Forms
- Procedures
- Work Instructions
- Policies
- Manuals
- Drawings
- Administrative
- Auditing
- Human Resources
- General
- Job Titles

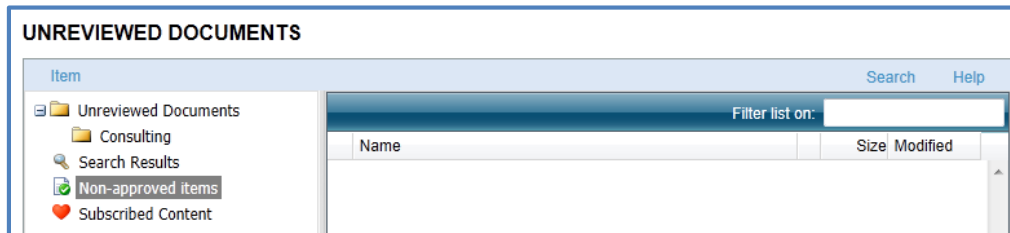
Cancel Finish

4.5.4 Approve a Document

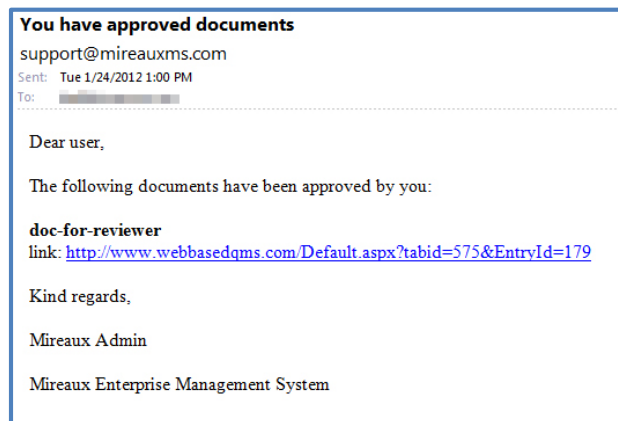
Once the document is ready, you will use the Approve function to approve the file. The Approve function can be found in the document menu when RIGHT-CLICKING the **Document** file name.



After CLICKING **Approve**, the file will no longer appear in the right content pane. If you still see the file, you may need to refresh the screen by CLICKING the **Folder** again, or by CLICKING **F5** from your keyboard.



Once you have approved the document, an email will be sent to you indicating the approval of the document.



4.5.5 MULTIPLE REVIEWERS

If the document was assigned to two or more people for review, it will be displayed as approved when any one of the reviewers approve it. The email will be sent to every reviewer, containing the message, “The following documents have been approved by you” although you may not have personally approved them.

While a new version of a document is waiting for review, the old version can still be viewed by all users. The new version will only be displayed when it is approved by any of the assigned reviewers.

4.6 UPLOADING A NEW DOCUMENT (DOCUMENT SPECIALIST ONLY)

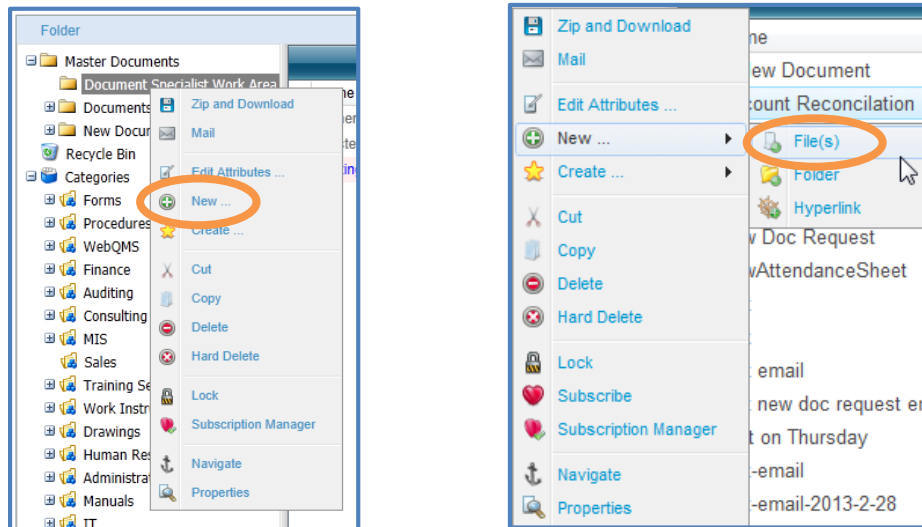
One of the primary tasks of a Document Specialist in the Master Documentation application is to upload new documents. You may need to upload a new document according to the needs of the company, based on a New Document Request, or feedback from employees. In either case, please ensure that your company’s Document Control procedure was fully adhered to.

4.6.1 Uploading A New Document

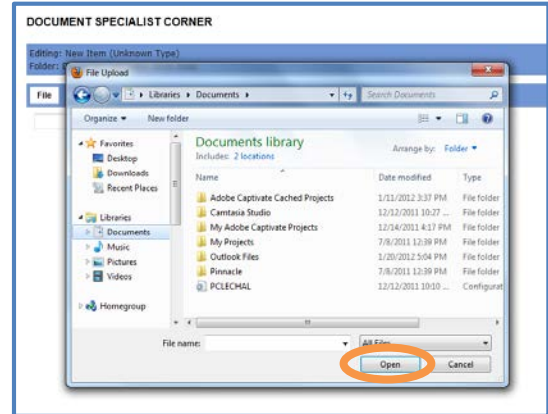
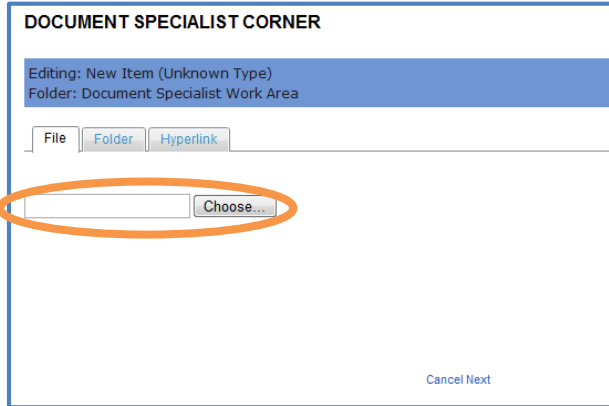
To create a new document, CLICK **Document Specialist Corner** from the Left Menu of the Master Document application. When you have entered the Document Specialist Corner, LOCATE the **Folder** where the document will be stored at (i.e. Procedures, Work Instruction, Forms, etc.). RIGHT-CLICK the **Folder** to access the document menu.

NOTE: You can upload the document to any sub-folders within the Documents folder.

From the document menu, SELECT **New**, then SELECT **File(s)**.

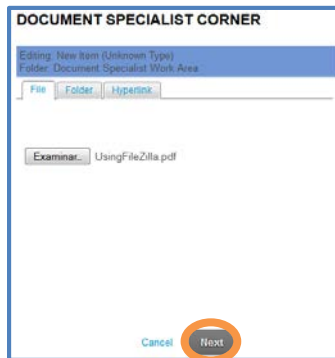


You will be directed to a new page which allows you to browse the document. CLICK **Choose** to locate the document in your local computer.

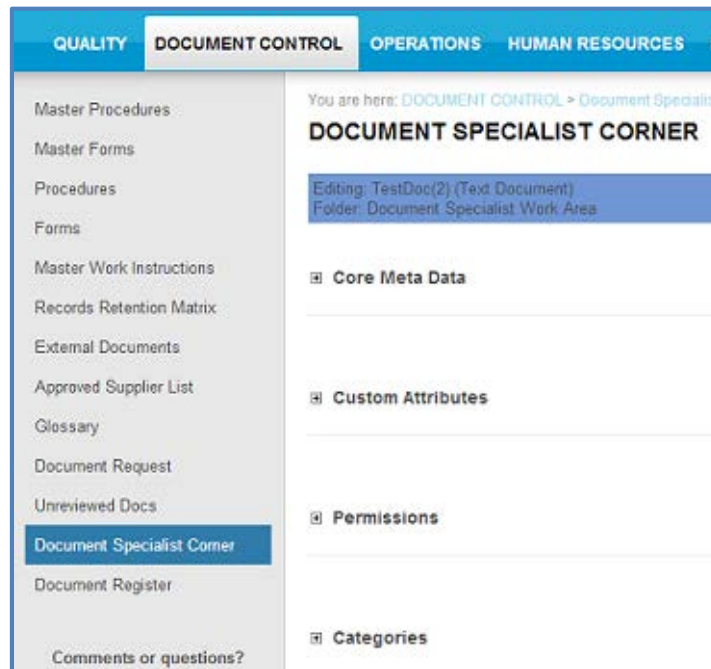


NOTE: The system will not upload files larger than 8-10MB.

Once you have **SELECTED** the file you wish to upload, **CLICK Open** to proceed. At this time, you will see the directory of the **SELECTED** file displayed in the field next to the **Choose** button.



CLICK Next to start uploading. A new page appears when the document has finished uploading. There are four expandable sections on the new page which essentially make up the document attributes:



4.6.1.1 Core Meta Data

The top section **Core Meta Data** contains information about the document that is obtained from the file and session name.

- **Type:** The **Type** of document format (**Word, PDF, Excel**, etc.) is assigned by the system. Change it only if you feel the type is wrong.
- **Title:** The **Document Title** is obtained from the file name, without spaces. Add spaces and modify the name as you deem appropriate
- **Author:** The **Author's Name** will be displayed based on the user signed up on Web QMS.
- **Keywords:** ENTER any **Keywords** that can help the Web QMS Search function find the document.
- **Versions to keep:** This is the number of the old versions you wish to keep. ENTER **-1** to keep all revisions. This number may be already set based on the settings. A good recommendation is to keep three (3) versions.
- **Remarks:** Here is where reviewers will enter their comments regarding approval/rejects. Since remarks can accumulate, add your **Name** and **Date** next to your comments.
- **Thumbnail:** If desired, SELECT a **Thumbnail** or icon for the document.

4.6.1.2 Custom Attributes

The second section is the **Custom Attributes**. These are fields added to help comply with ISO/API standard.

- **Document Number:** This is the Document Number assigned.
- **Revision Date:** This is the date of this document version. ENTER the **Date** or SELECT a **Date** from the Calendar icon.
- **Process Owner:** ENTER the name of the employee who will be responsible for approving changes to the document.
- **Doc Revision:** The Document revision can be a number, letter, or a combination. Write the version of your document here.
- **Status:** This field is optional. SELECT **Under Review** or **Released**. If more statuses are needed, ask your Administrator.
- **Management Sponsor:** ENTER the person who has the final approval authority on this file.
- **Last Review Date:** This field is optional. It provides a way to show when the document was renewed, even if it wasn't updated. ENTER a **Date** or SELECT the **Date** from the Calendar icon.
- **Next Review Date:** This field is optional. Based on your own company procedure, you can ENTER a **Date** that is two (2) years after the last review. ENTER a **Date** or SELECT the **Date** from the Calendar icon.

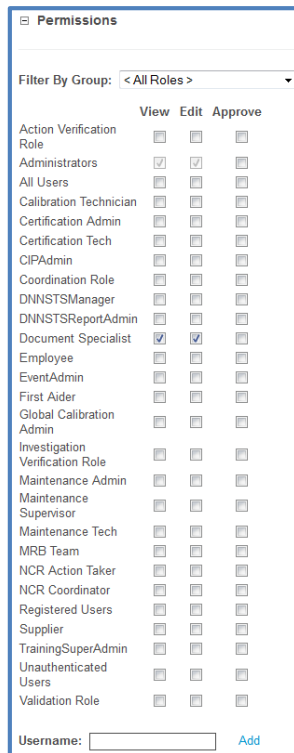
4.6.1.3 Permissions

The third section of the document attributes is called **Permissions**.

You must determine who has rights to view, edit, and approve each document. Set permission by CHECKING the **View, Edit, Approve** boxes for each security role. There are three ways to assign permissions to a document:

- a. BROWSE all available **Roles** and SELECT those you wish to assign permission to.

CLICK the **Filter By Group** dropdown menu and SELECT <All Roles>. All available roles will be displayed on the screen, similar to this:



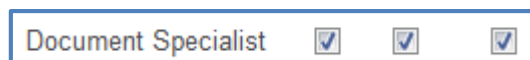
	View	Edit	Approve
Action Verification Role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
All Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Calibration Technician	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certification Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certification Tech	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CIPAdmin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coordination Role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DNNSTManager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DNNSTReportAdmin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Document Specialist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EventAdmin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Aider	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Global Calibration Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investigation Verification Role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance Supervisor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance Tech	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MRB Team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NCR Action Taker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NCR Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Registered Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supplier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TrainingSuperAdmin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unauthenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Validation Role	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Username: [Add](#)

NOTE: The length of the list varies depending on the customization of your Web QMS.

After identifying Permissions, CHECK the **Box** under **View, Edit** or **Approve** columns to give the specified users the rights to view, edit or approve a document.

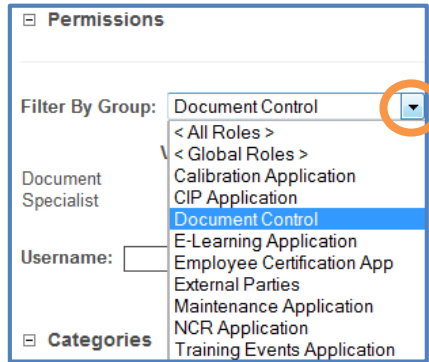
In this example, we will give the Document Specialist the rights to view, edit and approve this document. All three boxes are CHECKED.



Document Specialist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
---------------------	-------------------------------------	-------------------------------------	-------------------------------------

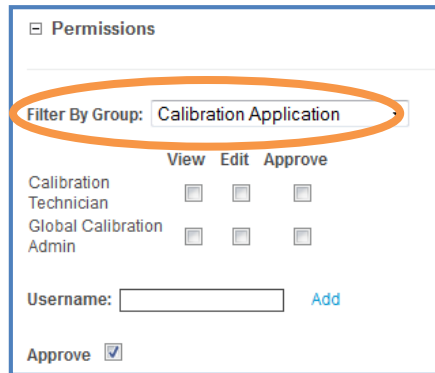
- b. SELECT a **Group of Roles** to view and assign document(s).

You can also SELECT the roles by group. EXPAND the **Filter By Group** dropdown menu, and SELECT the **Group of Roles**. The roles belonging to the chosen group will be displayed on the screen, similar to this:



The screenshot shows the 'Permissions' section of the application. The 'Filter By Group' dropdown menu is open, displaying a list of roles. 'Document Control' is highlighted in blue. Other roles visible include '< All Roles >', '< Global Roles >', 'Calibration Application', 'CIP Application', 'E-Learning Application', 'Employee Certification App', 'External Parties', 'Maintenance Application', 'NCR Application', and 'Training Events Application'. The 'Document Specialist' role is listed in the main area, and the 'Categories' section is partially visible at the bottom.

In this example, we will give the Document Control Group the rights to view, edit and approve this document. We can SELECT role(s) from the list as needed.

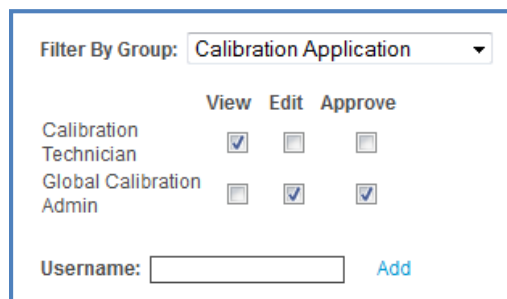


The screenshot shows the 'Permissions' form with 'Filter By Group' set to 'Calibration Application'. Below the filter, there are three columns: 'View', 'Edit', and 'Approve'. Under 'View', 'Calibration Technician' and 'Global Calibration Admin' have checkboxes. Under 'Edit', 'Global Calibration Admin' has a checkbox. Under 'Approve', 'Global Calibration Admin' has a checkbox. There is a 'Username' field and an 'Add' button. An 'Approve' checkbox is checked at the bottom left.

c. ASSIGN the document to a specific user.

If you wish to assign this document to a specific user who has no other roles besides Employee, EXPAND the **Filter By Group** mega menu, and SELECT **< Global Roles >**.

ENTER the username in the field next to **Username** and CLICK **Add**. The specified user will then be displayed above. Assign the roles as needed.



The screenshot shows the 'Permissions' form with 'Filter By Group' set to 'Calibration Application'. The 'View', 'Edit', and 'Approve' checkboxes are checked for 'Calibration Technician' and 'Global Calibration Admin'. The 'Username' field is empty, and the 'Add' button is visible.

You must SELECT the **Edit** and/or **Approve** checkbox so that the user can edit and/or approve the document.

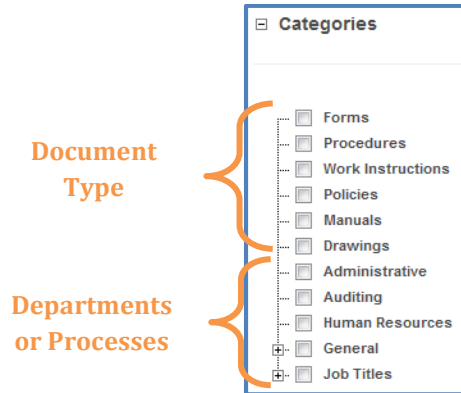
- If the new document is ready to be released to employees, you do not need to CHECK the **Approve** box for any roles. It will be automatically approved and displayed to employees.
- If the new document is not ready to be released, and needs approval, make sure you CHECK the **Approve** box for at least one user(s) from the list.

4.6.1.4 Categories

In this area, you can SELECT **Categories** for the document. A document may belong to more than one category. CHECK all the necessary categories relevant to the document.

In general, categories can be defined as:

- a. Those that show what type the document is
- b. Those that show the department or process the document belong to

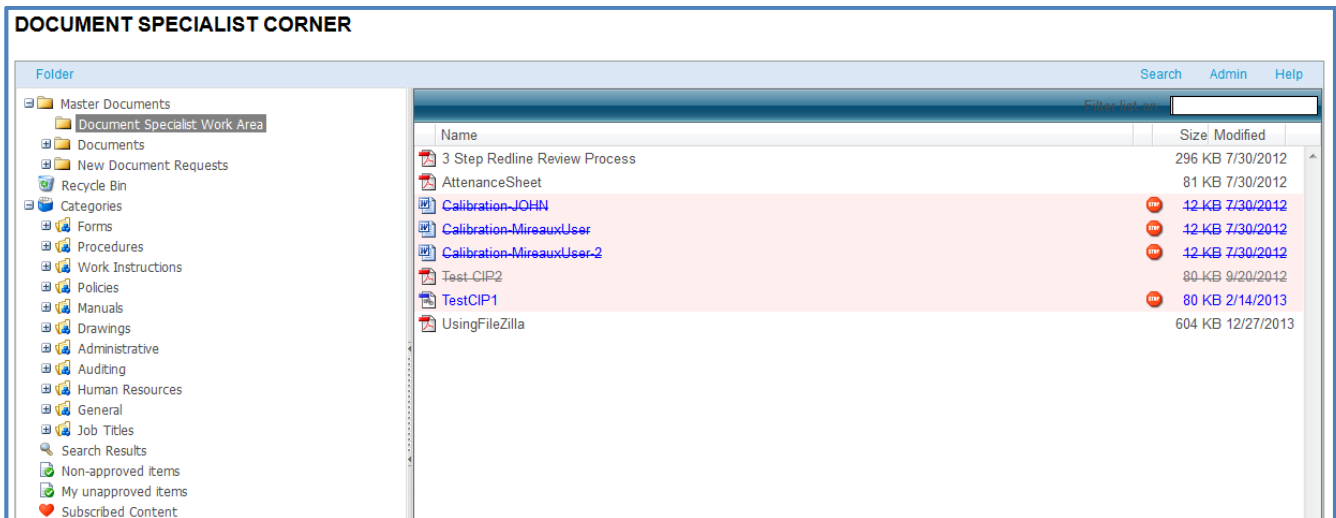


If you did not SELECT any categories for the document, it will not be accessed anywhere but the Document Specialist Corner. If you do not want the document to be accessed by employees, you can use this method to temporarily “Hide” the document.

CLICK **Update** when done.



The new document has been created and saved in Document folder. You can continue to edit it, assign reviewers or show the document to users as needed.



4.6.2 Creating A New Document From A Document Request

When a user sends a New Document Request to the Document Specialist, the Document Specialist will receive an email indicating that there is a new document request awaiting their action.

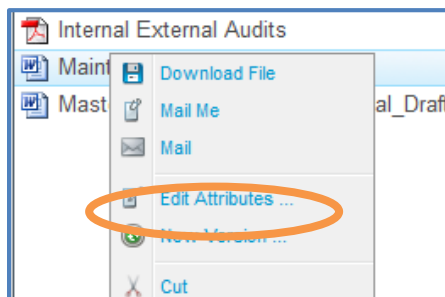
Once you receive a document request from a user, you will see the document in the New Document Request folder in the Document Specialist Corner.



CLICK the **Document** to work on it. You can download and edit the document, modify the attributes, add a new version, or prep the document before releasing or sending it for review.

4.7 EDITING DOCUMENT ATTRIBUTES (DOCUMENT SPECIALIST ONLY)

For any existing document, you can edit its Attributes as needed. LOCATE the document you wish to edit and RIGHT-CLICK the **Document Name**. A document menu will be displayed.

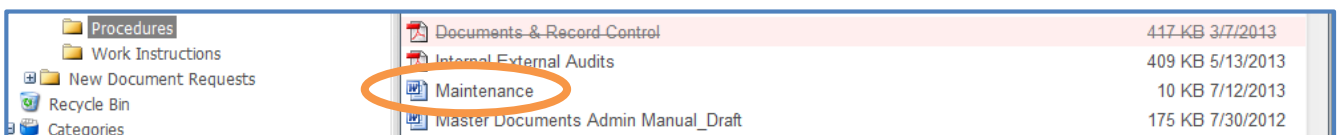


SELECT **Edit Attributes** from the menu. You will be directed to the Edit Attributes page. Refer to **4.3.1 Uploading A New Document** for more information. On this page you can edit the titles, ownership, permissions, and categories as necessary.

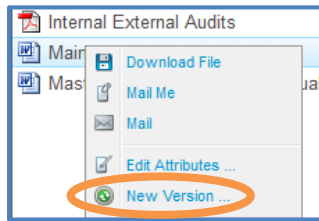
4.8 ADDING A NEW VERSION AND ASSIGNING FOR APPROVAL (DOCUMENT SPECIALIST ONLY)

4.8.1 Adding A New Version For An Approved Document

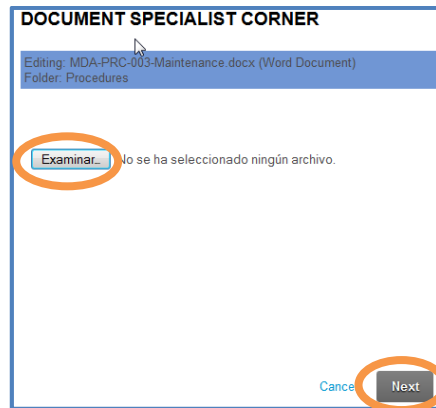
If you have a new version for an existing approved document, you can upload it for employees to view, or for reviewers to review. To upload a new version of a document, first LOCATE the document. In this example, the document is located in **Procedures**.



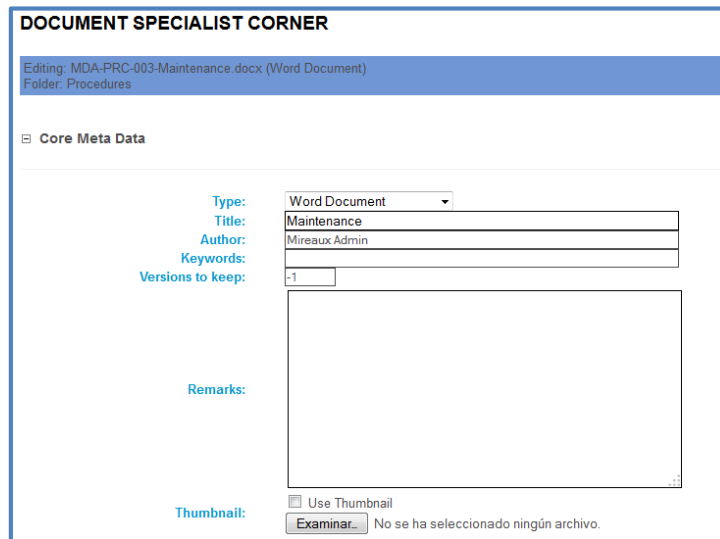
RIGHT-CLICK on the **Document Name**, and SELECT **New Version** from the document menu.



LOCATE the **Document** on your local computer, and CLICK **Next** to upload.



Once the document is uploaded successfully, you will be asked to edit the attributes of the file.

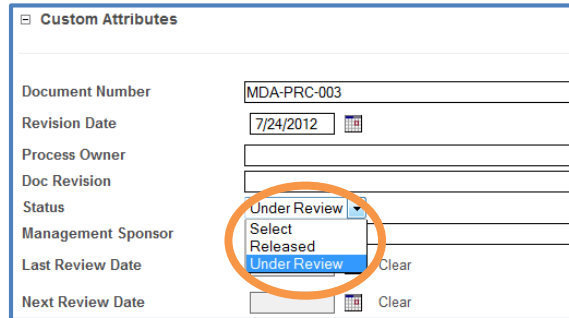


NOTE: In order for users to recognize the new version of the document, you may need to edit the information of the file, such as changing the **Doc Revision** from 1 to 2, and so on. Refer to **4.3.1 Uploading A New Document** for more information.

In the **Permissions** section, add or edit the roles of the Reviewers as needed.

SELECT the role(s) you wish to assign for document approval. Refer to **4.3.1.Uploading a New Document** for more information about SELECTING a specific role, a group of roles, or a specific user.

If the new version is ready to be released to the employee, keep the Status as **Released**. If the new version of the document still needs to be approved, SELECT **Under Review** from the Status dropdown menu so the new version will not be approved automatically.



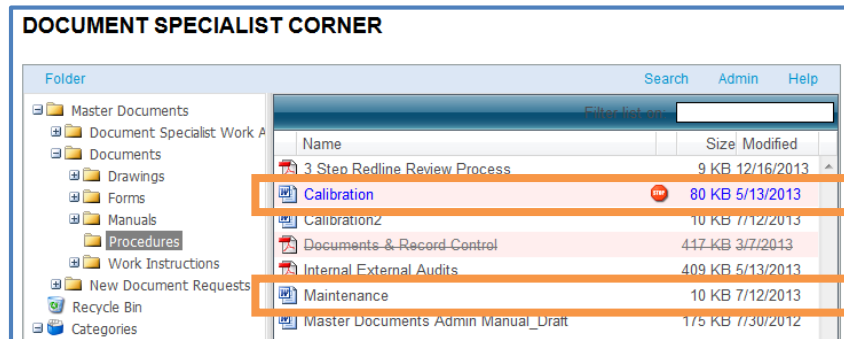
The screenshot shows a form titled "Custom Attributes" with several input fields. The "Status" field is a dropdown menu with the following options: "Under Review", "Select", "Released", and "Under Review". The "Under Review" option is highlighted with a blue background and is circled in orange. Other fields include "Document Number" (MDA-PRC-003), "Revision Date" (7/24/2012), "Process Owner", "Doc Revision", "Management Sponsor", "Last Review Date", and "Next Review Date".

NOTE: If you assign the document to a group of people who have the same role, the document will be approved once anyone in the group approves the document. For example, when you assign a document to the Sales role, every person who has the Sales role will be notified that there is a document waiting for reviewing. Once the document is reviewed and approved, the other people in the Sales group do not need to approve again. If you need every one in the same group or role or every Reviewer you assigned to approve this document individually, refer to **4.5.4. Assign A New Version To Multiple Reviewers** for more information.

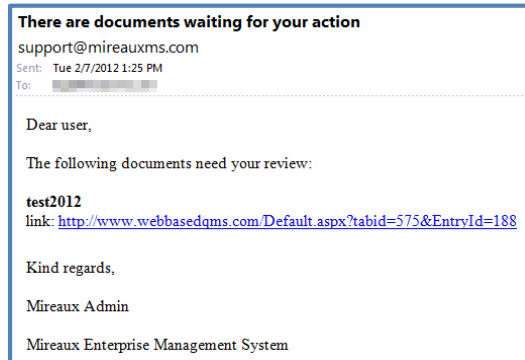
CLICK **Update** to proceed.



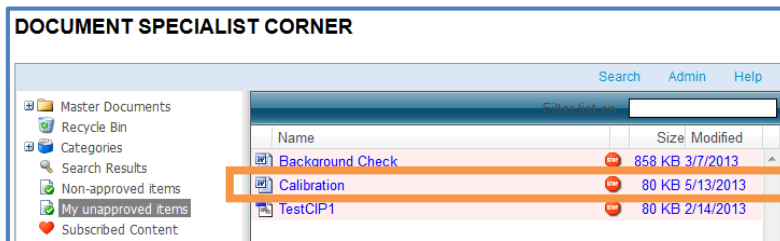
Once a new version is added to an approved document, you will see the document in the specified folder. If the document still needs to be approved, you will see a stop sign icon next to the document's listed size.



The user assigned as the reviewer for this document will receive an email indicating there is a document waiting for review, similar to this:



The Reviewer can access this document through the direct link in the email, or access the document in the **Non-approved Items** folder from the **Reviewer Corner**. This is the reviewer’s view, when they receive a non-approved document in the Reviewer Corner:

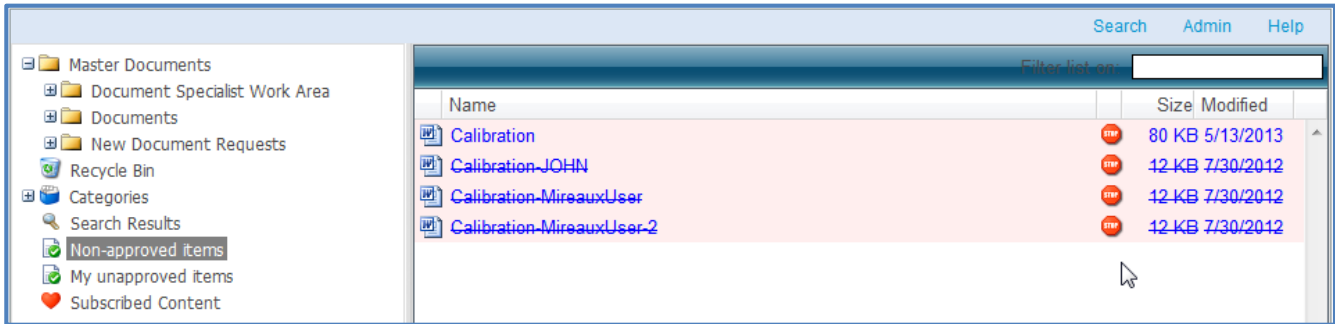


Before approval of the new version, the previous version of the document can still be viewed by employees on Web QMS, similar to this:

MASTER LIST OF PROCEDURES						
	Title	Document Number	Revision Date	Status	Process Owner	
	3 Step Redline Review Process	MXP-CON-001	16-Dec-2013	Under Review	M. Boudreaux	
	Account Reconciliation	MXP-FIN-004	02-Mar-2011		M. Boudreaux	
	Calibration	A1	20-Mar-2012	Released	Doc Spec	

4.8.2 Adding A New Version For A Non-Approved Document

Web QMS also allows you to upload a new version for a non-approved document. The procedure is same as adding a new version for an approved document. The only difference is the Reviewer’s screen. The two versions are displayed in the Non-approved Items folder awaiting approval. This is the reviewer’s view:



In this case, the Reviewer can manage the two versions through the following ways.

- If the reviewer only approves the original version of the document, the original document will be displayed for employee review.
- If the reviewer only approves the new version of the document, the new version will be displayed for employee review.
- In the event that the reviewer approves both of the two versions, no matter which version they approve first, only the new version will be displayed for employee review.










When an employee CLICKS the information icon on the right hand side of the document, the two versions will be displayed, similar to this:

Calibration

Document Number: A1
 Release Date: Tuesday, March 20, 2012
 Process Owner: Doc Spec
 Management Sponsor: Doc Spec
 Author: Miriam Boudreaux
 Created: 9/13/2012 1:58 PM
 Categories: Procedures
 Remarks:

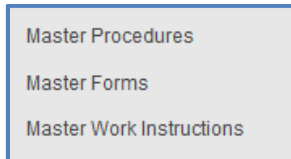
Versions

Version	Revision	Last Modified	Form Title	Size	Download
7		12/30/2013	Calibration	82.3 KB	
6		9/13/2012	Calibration	23.7 KB	
5		7/30/2012	Calibration	12.7 KB	
4		7/30/2012	Calibration	83.2 KB	
3		7/30/2012	Calibration	23.7 KB	
2		7/30/2012	Calibration	22.0 KB	
1		7/30/2012	Calibration	9.9 KB	



If necessary, the employee can still access the two versions by CLICKING on the **Disc icon** under the **Download** column.

4.8.3 Adding A New Version According To User Comments

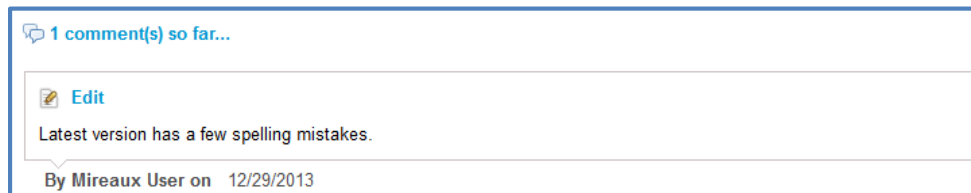
Sometimes, you will need to upload a new version of a document according to user comments. To view user comments, SELECT the pages such as **Master Procedures**, **Master Work Instructions**, and **Master Forms** from the **Document Control Menu**.



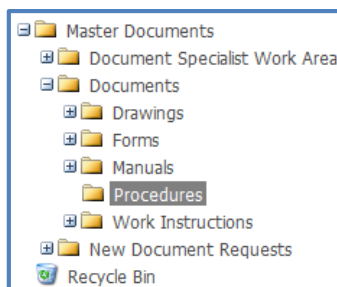
CLICK the **Information icon** on the right end of the row to view the detailed information about this document.

MASTER LIST OF PROCEDURES						
	Title	Document Number	Revision Date	Status	Process Owner	
	3 Step Redline Review Process	MXP-CON-001	16-Dec-2013	Under Review	M. Boudreaux	

On the information page of the document, SCROLL down to the bottom to see if there are any comments about the potential changes associated with the document:



Go to **Document Specialist Corner** and locate the document on the respective directory of the Documents folder.



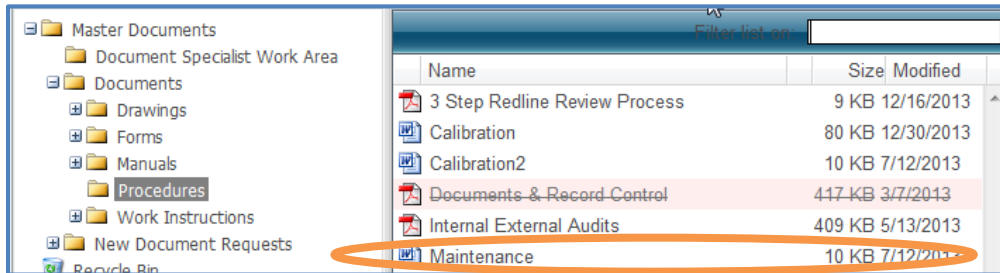
You can view and edit the document according to the comments you received from the users. In addition to updating the contents of the document, you can also edit the attributes, or upload a new version. After finalizing the document, you can release it to the employees or send to review.

4.8.4 Assigning A New Version To Multiple Reviewers

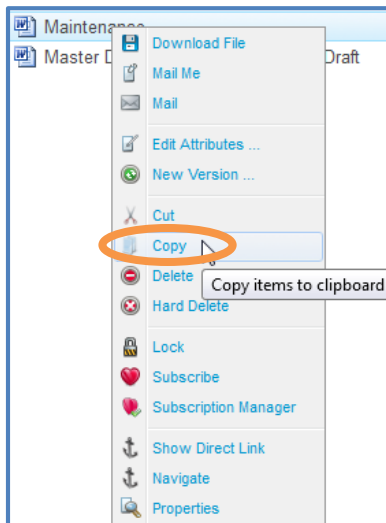
If you wish to assign a new version of a document to multiple Reviewers, and need the Reviewers to approve the document individually, there are two ways to achieve this:

4.8.4.3 DUPLICATE the original document and send out for reviewing

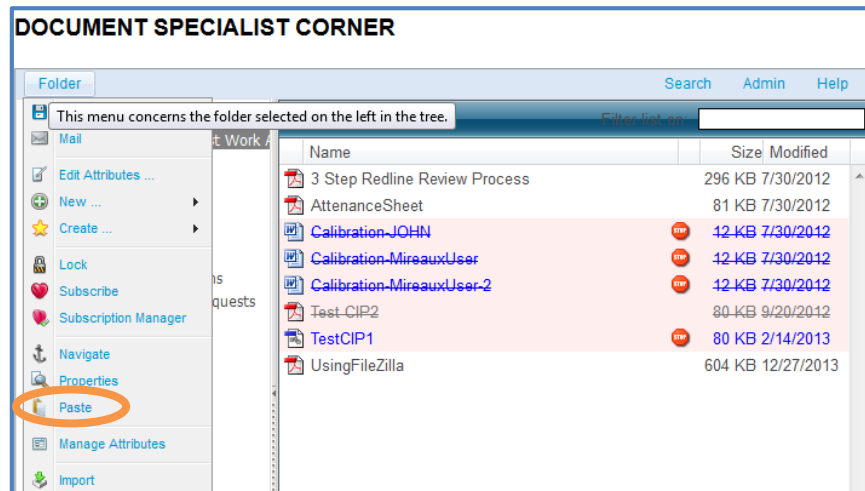
LOCATE the **Folder** that contains the document. In this example, the new version for the document is named "Maintenance." We want assign multiple users to approve this new version.



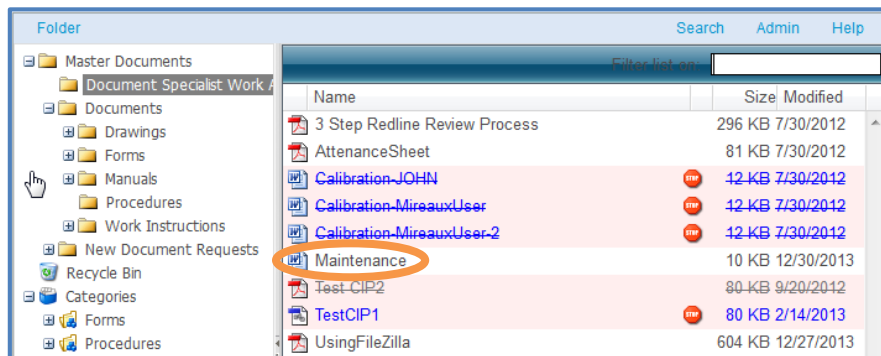
RIGHT-CLICK the **Document Name** and SELECT **Copy**.



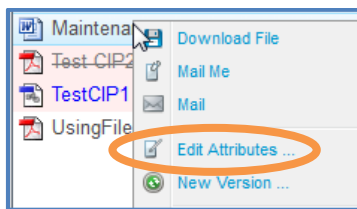
SELECT the **Folder** that will contain the copied documents. PLACE the cursor on **Folder** link from the top section of the **Document Specialist Corner**. CLICK **Paste** from the document menu. In this example, the document will be pasted in the Document Specialist Work Area folder:



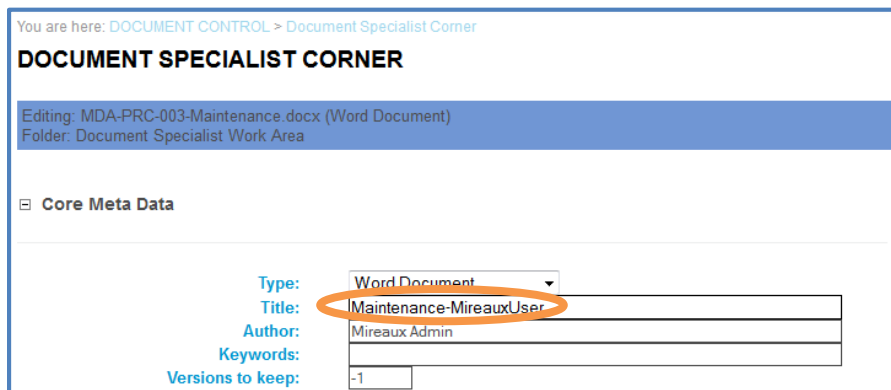
You will see a document with the exact same name has appeared in the folder.



To avoid confusion, CHANGE the **Document** Name so you can differentiate the documents from the various Reviewers. In this example, we wish to ASSIGN this **Copy** to MireauxUser for approval. We will CHANGE the **Document Name** to Maintenance-MireauxUser. To acheive this, RIGHT-CLICK the **Document Name** and SELECT **Edit Attributes**.



CHANGE the **Document Name** in the Core Meta Data section.



EDIT the **Permissions** of the copied document:

- Make sure the **Approve** box is unchecked
- ENTER the **Username** of the Reviewer in the Username field and CLICK **Add**
- SELECT **View**, **Edit** and **Approve** functions for this user.

Permissions

Filter By Group: < Global Roles >

	View	Edit	Approve
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
All Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Registered Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unauthenticated Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mireaux User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Username: [Add](#)

Web QMS automatically deleted the selections in Categories section. Thus, the employees will not see this document until you make changes manually. In this example, we will keep the Categories like this until the document is ready.

Categories

- Forms
- Procedures
- Work Instructions
- Policies
- Manuals
- Drawings
- Administrative
- Auditing
- Human Resources
- General
- Job Titles

CLICK **Update** on the bottom of the page when ready.

Follow the same steps to COPY and PASTE the **Document** in the Document Specialist Work Area folder. Now there are three copies of the same new version of the “Maintenance” document assigned to different users.

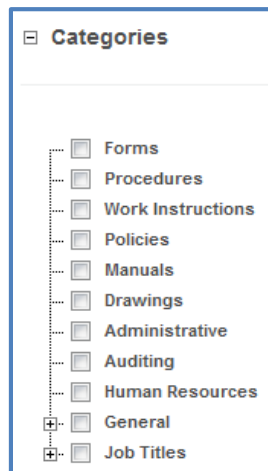
Name	Size	Modified
3 Step Redline Review Process	296 KB	7/30/2012
AttendanceSheet	81 KB	7/30/2012
Calibration-JOHN	12 KB	7/30/2012
Calibration-MireauxUser	12 KB	7/30/2012
Calibration-MireauxUser-2	12 KB	7/30/2012
Maintenance-MireauxAdmin	10 KB	12/30/2013
Maintenance-MireauxUser	10 KB	12/30/2013
Maintenance-WorkshopSupervisor	10 KB	12/30/2013
Test-CIP2	80 KB	9/20/2012
TestCIP1	80 KB	2/14/2013
UsingFileZilla	604 KB	12/27/2013

After reviewed by the specified Reviewers, you must download, compare, edit, and finalize the document. When the document is ready, upload the newer version to the original document.

4.8.4.4 Assigning the document to one person at a time.

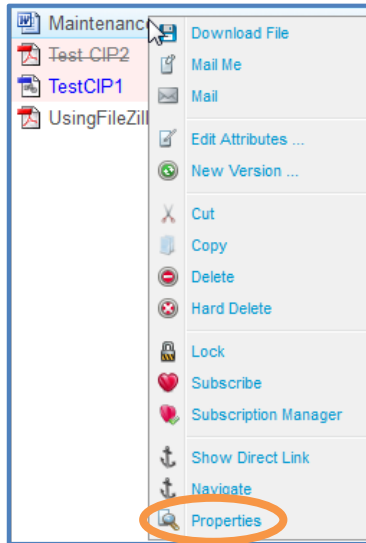
After approval by a user, EDIT the **Document**, UPLOAD a **New Version**, and ASSIGN it to the next **Reviewer**. You need to continue to do until every Reviewer approves the document.

To achieve this, you will need to decide whether you want employee access to this document while it is under approval. If you do not want employees to access the document until all the Reviewers finish reviewing, make sure you UNCHECK the **Categories**.

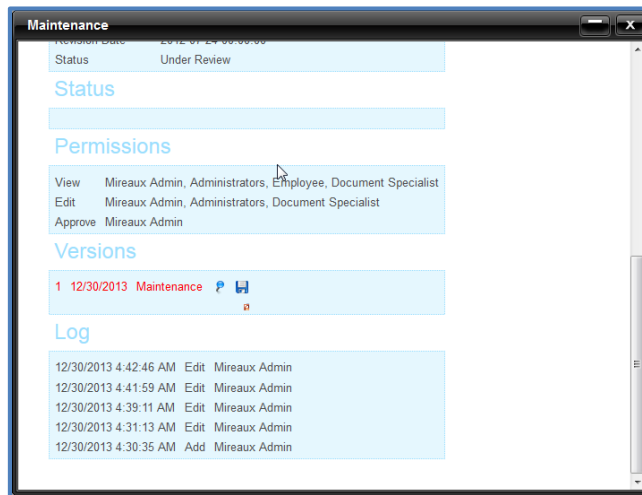


If you do want the document to be accessed by employees while under reviewing, you can leave it as is. Keep in mind that when a Reviewer finishes reviewing and approves the document, the employees will be able to see the approved version.

If you want the Reviewer to work on the document, but do not want employees to access it until the document is ready to be released, you need to NOTIFY the **Reviewer** that they can add comments to the document in the Remarks field (in Core Meta Data section), and even upload a new version, not to approve it. Otherwise, employees can access the document. You can view all the comments from Reviewers and all of their new versions in Document Properties. RIGHT-CLICKING the **Document Name** gives you access to **Properties** in the context menu.



All document information can be accessed from here. As the Document Specialist, you can access Document Path, Details, Status, Permissions, Versions, and Log. You can access both new and old versions in the History of the document.



You can edit, upload new version, and finalize the document until all Reviewers approve the document individually.

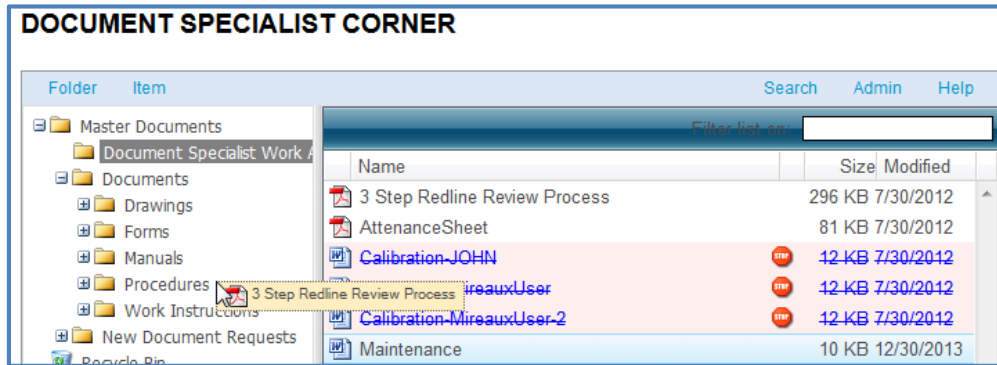
4.9 MODIFYING A DOCUMENT FOR RELEASE (ADMIN/DOCUMENT SPECIALIST ONLY)

After the Document Specialist receives the notification of the review completion by all assigned Reviewers, the document is ready to be released.

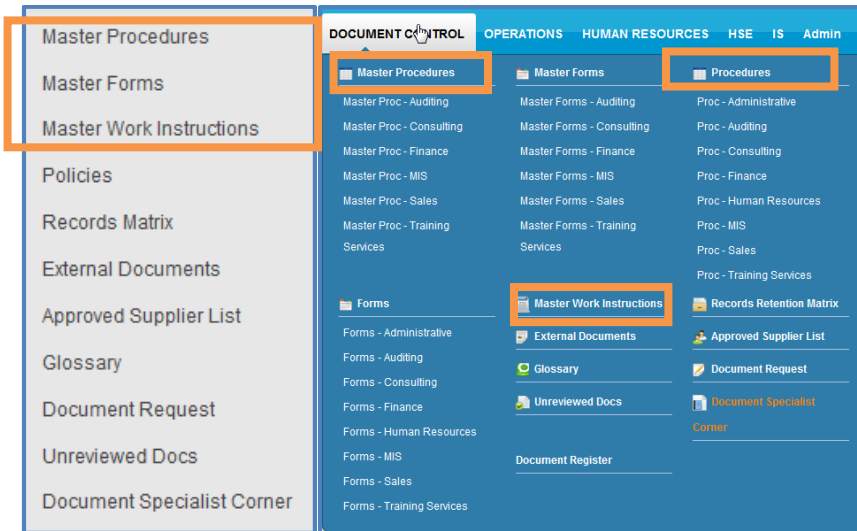
According to the feedback from Reviewers and the new versions they uploaded (if any), you can add a final version to the document, and edit **Attributes** (Permissions, Categories) as needed. Refer to **4.4**

Editing Document Attributes and 4.5 Adding a New Version And Assigning For Approval for more information.

Once you have finished editing, and the document is ready to be released, make sure to place the document in the correct folder, especially when you put the document in Document Specialist Work Area to edit.



Now the document can be viewed by employees. The users can access the document by **CLICKING** on the page from the Left Menu, or from the mega menu of the **Document Control** tab.




This is the screen that the users will see when they **CLICK** a certain page from the Left Menu. In this example, the document is in **Procedures** page:

MASTER LIST OF PROCEDURES						
	Title	Document Number	Revision Date	Status	Process Owner	
	3 Step Redline Review Process	MPX-CON-001	16-Dec-2013	Under Review	M. Boudreaux	
	Account Reconciliation	MPX-FIN-004	02-Mar-2011		M. Boudreaux	
	Calibration	A1	20-Mar-2012	Released	Doc Spec	
	Calibration2	MDA-PRC-001	12-Jul-2012			
	Internal Document Template-New	Template1	15-Mar-2012		Mireaux Admin	
	Internal External Audits	MPX-AUD-001	02-Mar-2011	Released	M. Boudreaux	
	Maintenance	MDA-PRC-003	24-Jul-2012	Under Review		

On this page, CLICK the **Document Name** to download and view the document. CLICK the information icon to open the detailed information of the document, including: Document Number, Release Date, Process Owner, Management Owner, Author, Created Date and Time, Categories, Remarks, Versions, and Comments.

You are here: DOCUMENT CONTROL > Document Details

Internal External Audits



Document Number	MPX-AUD-001
Release Date	Wednesday, March 02, 2011
Process Owner	M. Boudreaux
Management Sponsor	M. Boudreaux
Author	Document Specialist
Created	7/30/2011 10:28 AM
Categories	Procedures, Administrative
Remarks	

Versions

Version	Revision	Last Modified	Form Title	Size	Download
1		5/13/2013	Internal External Audits	419.1 KB	

Log

Date/Time	User	Action

Show Deleted [Edit Templates](#)

0 comment(s) so far...

Your name:

Comment:

[Add Comment](#) [Cancel](#)

There are some icons on top of the page indicating the functions you can use on this document:



These functions include (From left to right): **Edit Attributes, New Version, Download File, Subscribe, Lock, Hard Delete, Delete, Mail Me, Cut and Copy.**

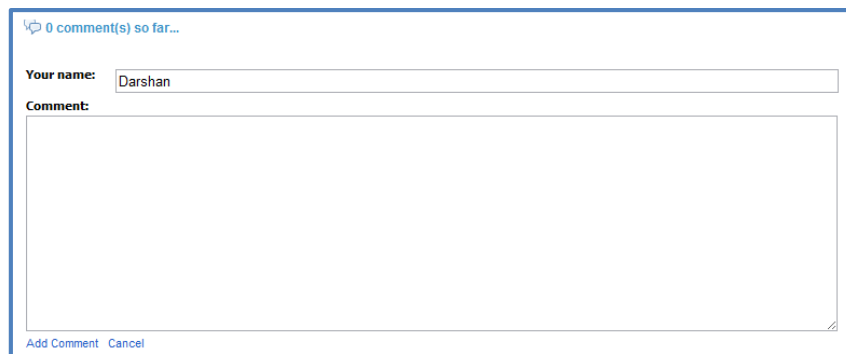
4.10 COMMENTS

4.10.1 Adding Comments To A Document

You can add comments below the document so that the **Document Specialist** will see them immediately and make changes as needed.

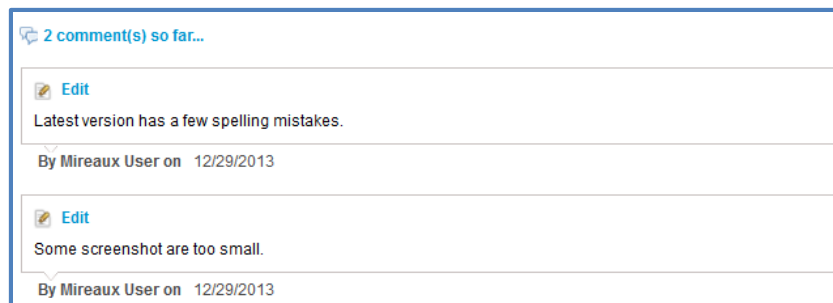
4.10.1.1 Adding a Comment to an Existing Document

Locate the desired document by using the steps described in section **4.2 Accessing Documents.** Below the document details and Version information, there is a comment box.



You can enter any comments to the document in the Comment field. Your name is pre-populated on the form, but you can change it if necessary. **CLICK Add Comment** when finished.

Once you have submitted the comments, the **Administrator** and **Document Specialist** will see the comments immediately, similar to this:



Once they approve the comment, you will see the comments below the existing comments on the screen.

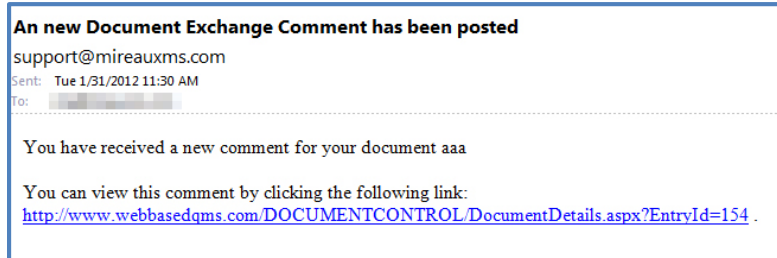
4.10.1.2 Requesting a Change to an Existing Document

Any user can also request a change to an existing document using comments function. In the comment box, type the change required, and **CLICK Add Comment** to submit the change request. If necessary, you can file a new document request through the following section.

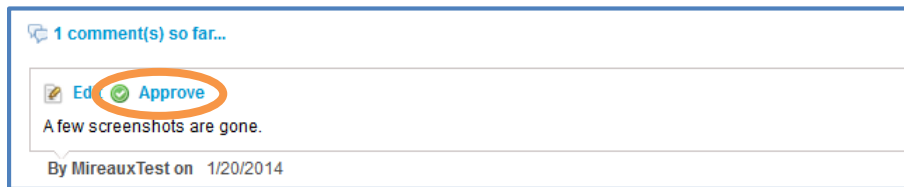
4.6.2 Approving A Comment

When users add a comment to the document, **Document Specialist** and **Administrator** need to approve the comment so that it can be viewed by all users.

Once a new comment posted, the **Document Specialist** and **Administrator** will receive a notification email from Web QMS indicating that there is a new comment posted to a certain document. **CLICK** the **Link** in the email and review the comment.



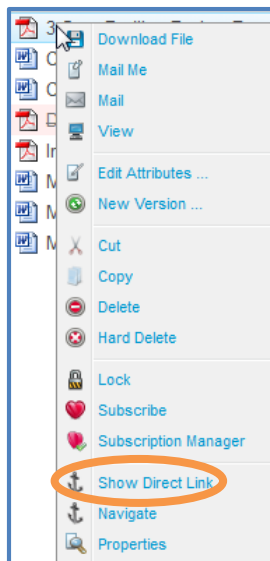
You will see the new comment with an Approve option below the existing comments. **CLICK Approve** and the comment will be displayed on the screen to all users.



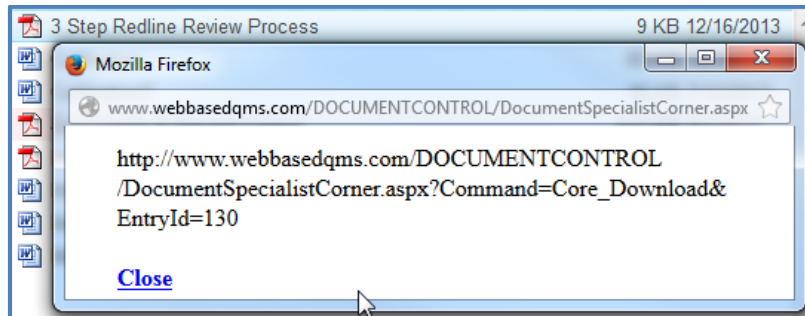
4.7 LOCATING A SPECIFIC DOCUMENT OR FOLDER (ADMIN/DOCUMENT SPECIALIST ONLY).

4.7.1 Use Direct Link

RIGHT-CLICK the **Document Name**, and **SELECT Show Direct Link** from the mega menu.



A new window will be opened with a URL. COPY this URL and PASTE it into the URL box of the browser.



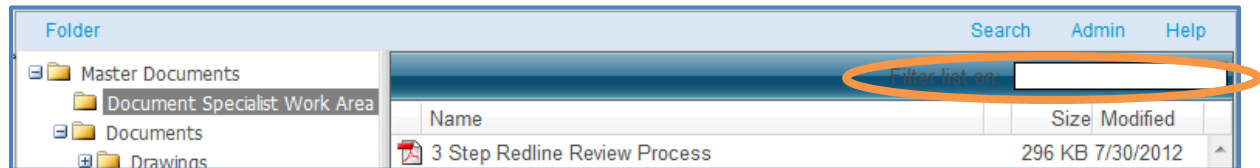
You can access the document directly.

NOTE: This link only works for the Document Specialist use for safety reasons. If you want employee access to a document, use the URL of the document from Web QMS in sections like Procedure, Forms, and Work Instructions.

In order to help the **Document Specialist** find the specific document in the Document Specialist Corner, Web QMS provides a Search function. The Filter function is located at the top section within the **Document Specialist Corner**.

4.7.2 Filter Function

If you do not want all the documents or folders to be displayed, or you only want a specific document or folder displayed on the screen, you can use Filter function.

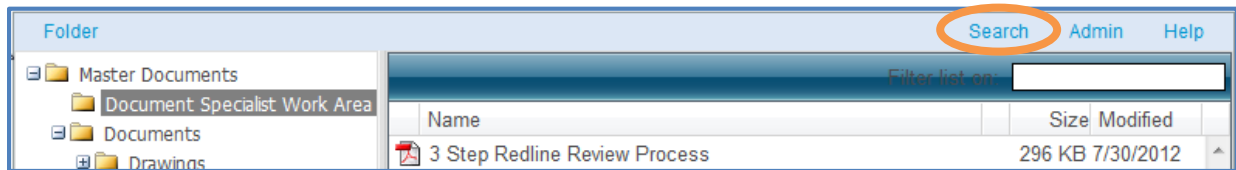


Enter the keywords or the full name of the document or folder in the field. The result will be automatically displayed in the content pane below it.



4.7.3 Search Function

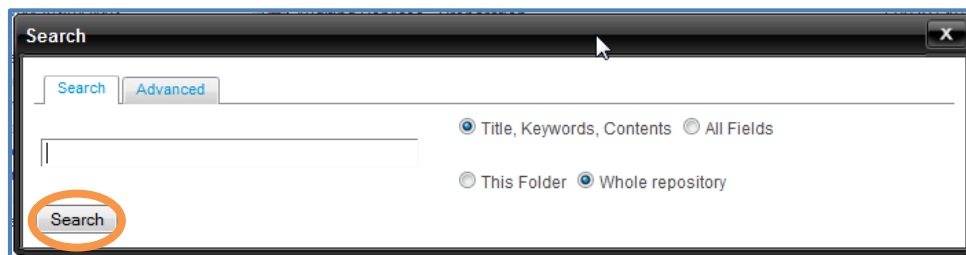
You can also use the Search function on Web QMS. The Search function is located at the top section within the **Document Specialist Corner**:



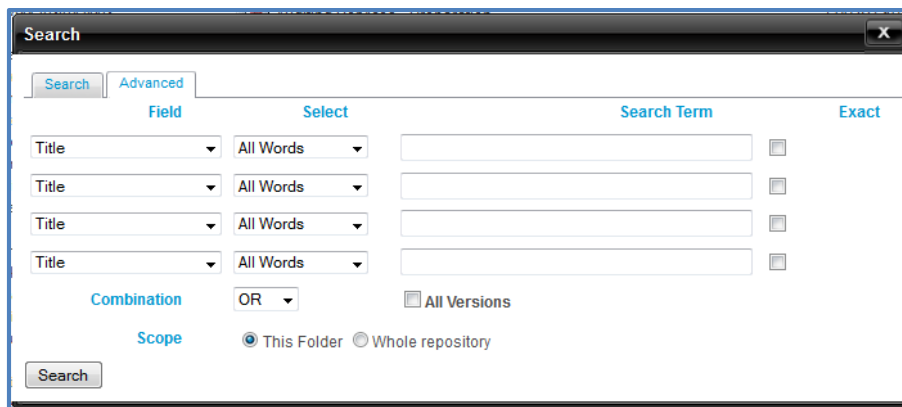
CLICK **Search** to open the search pane.

ENTER the **File Name** you wish to locate in the field and SELECT the **Search Range** on the right hand side. You can search the file by:

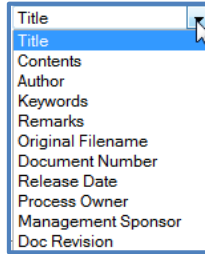
- **Title, Keywords, Contents:** The search will be conducted by the file name, keywords, or some contents of the document.
- **All Fields:** SELECT this to search the keywords, or contents in all fields of a document which the file owner entered when created the file.
- **This Folder:** Only search the specific file in this folder.
- **Whole Repository:** The search will be conducted in the whole repository.



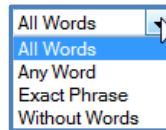
USE **Advanced Search** as needed. In the advanced search pane, you have more options:



- **Field:** SELECT from the mega menu the field you wish to search: **Title, Contents, Author, Keywords, Remarks, Original Filename, Document Number, Release Date, Process Date, Process Owner, Management Sponsor, Doc Revision.**

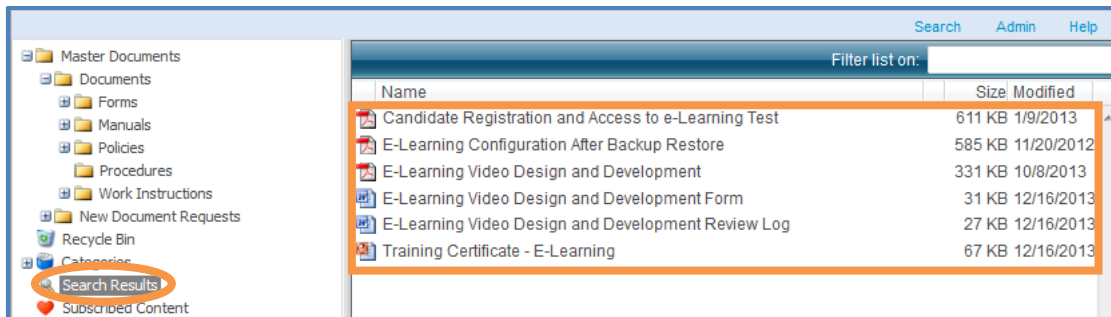


- **SELECT:** SELECT from the mega menu the criteria of the search: **All Words, Any Words, Exact Phrase, Without Words.**



- **Search Term:** ENTER the **Term** you wish to search in this field.
- **Exact:** CHECK the **Box** if you want the exact search.
- **Combination:** SELECT either “**OR**” or “**AND**”.
- **All Versions:** CHECK the **Box** if you wish to search in all versions of the documents.
- **Scope:** SELECT from This Folder or Whole repository.

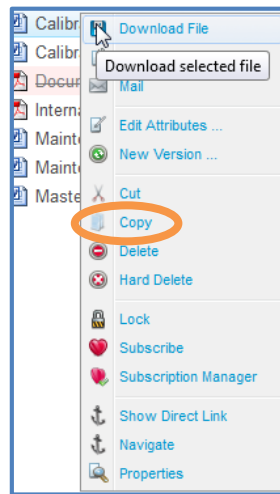
CLICK **Search** to start searching for the document. The search result can be found in **Search Results**. The file information will be displayed on the content pane of the page.



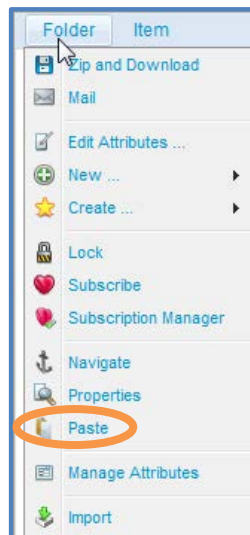
4.8 COPY AND PASTE A DOCUMENT (ADMIN/DOCUMENT SPECIALIST ONLY)

When you need to Copy and Paste a document, follow the steps below:

RIGHT-CLICK the document name, and SELECT Copy from the context menu.



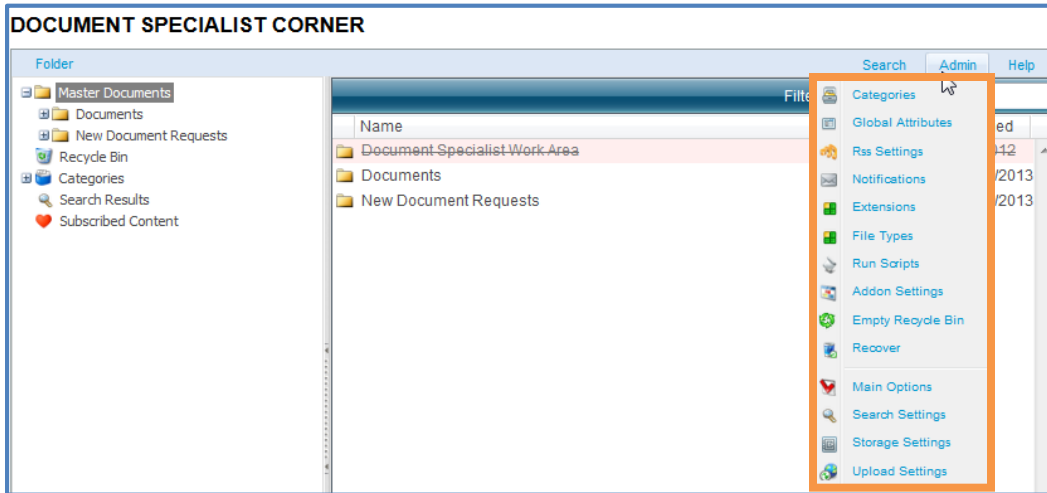
LOCATE the **Folder** that you wish to paste the document to. PLACE your **Cursor** on the **Folder** from the top section. SELECT **Paste** from the mega menu.



You will see the document was pasted to this folder.

4.9 OTHER ADMIN FUNCTIONS (ADMIN/DOCUMENT SPECIALIST ONLY)

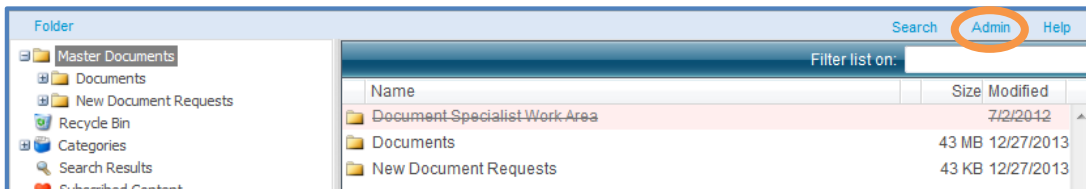
As the **Document Specialist**, you have some Administrative functions that will help you to manage document and folders. You can access these functions from the **Admin** tab within the window of Document Specialist Corner.



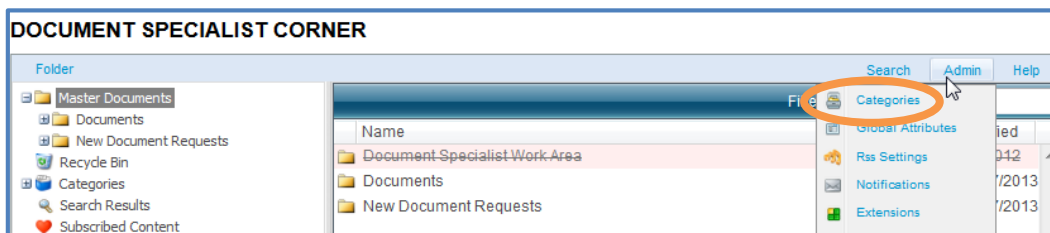
From this mega menu, you see the options: **Categories, Global Attributes, RSS Settings, Notifications, Extensions, File Types, Run Scripts, Add-on Settings, Empty Recycle Bin, and Recover**. Due to limited space, we will introduce only the main functions that you can perform on your end.

4.9.1 Adding Categories

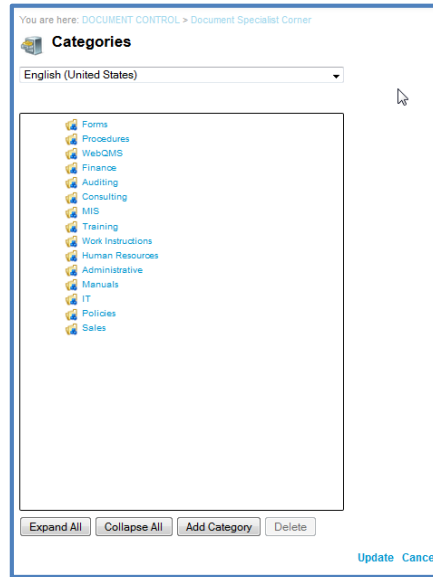
GO to **Document Specialist Corner**. PLACE your **Cursor** on **Admin tab**.



A mega menu will extend. LOCATE and CLICK **Categories**.

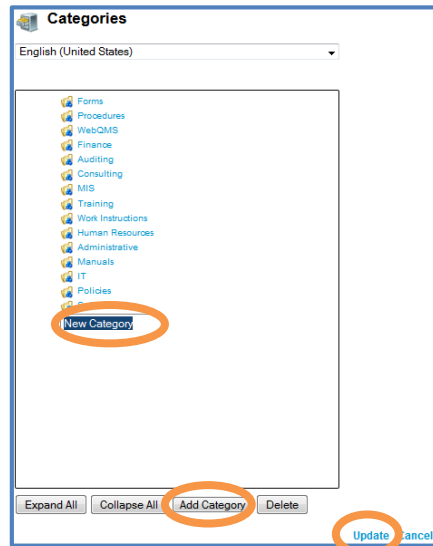


You can add categories to the application as needed.



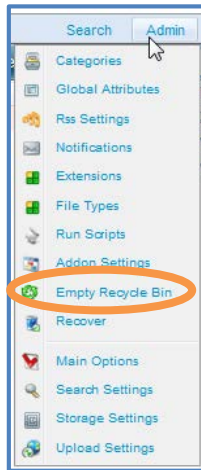
There are three ways available for you to manage the categories:

- **Expand All:** SELECTING this will expand and show all the categories in the application.
- **Collapse All:** COLLAPSE all the categories.
- **Add Category:** CLICK add a **New Category** to the application. DOUBLE-CLICK the **New Category** to edit it.

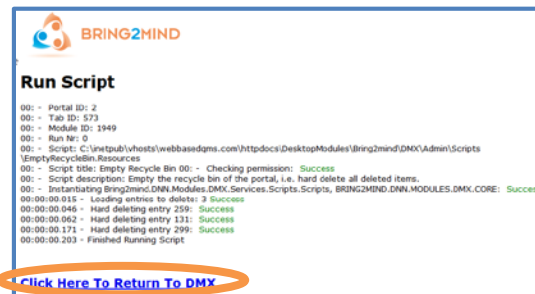


- **Delete:** To delete a category, SELECT the specific **Category** and CLICK **Delete**. CLICK **Update** below the form to save the information.

4.9.2 Empty Recycle Bin



If you have SELECTED this option from the mega menu, you will remove all the documents you placed in the Recycle Bin. CLICK the **Link** from the page to go back to the **Document Specialist Corner**.



4.10 SUPPORT INSTRUCTIONS (ADMIN/DOCUMENT SPECIALIST ONLY)

4.10.1 Setting Up Master Document Roles

The Master Documents application has two roles: **Document Specialist** and **Document Reviewer**.

4.10.2 Document Specialist Role

The Document Specialist is designated to receive new document requests or request for changes made by users. When a new document request or document change is submitted, the Document Specialist can perform the following tasks:

- Modify the document or document attributes
- Send for review to designated Reviewers
- Update the document attributes
- Release the document

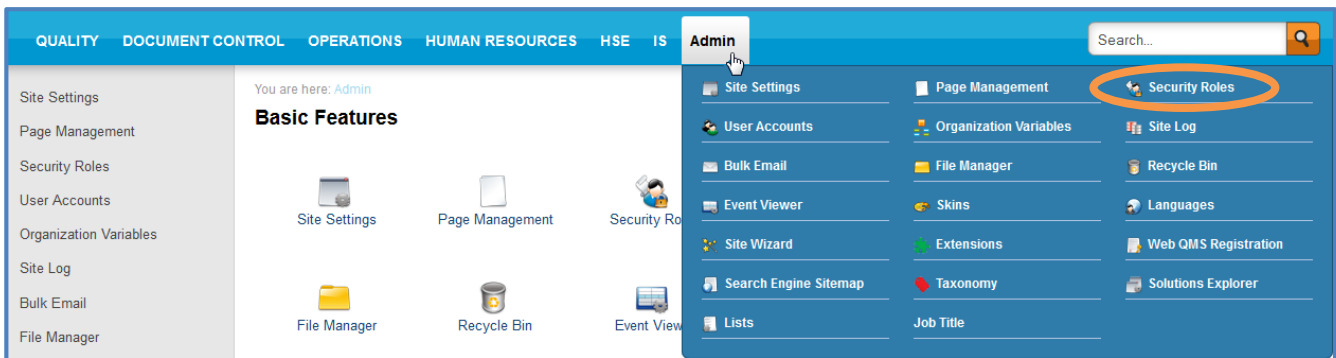
The Document Specialist role has been created in the system, so there is no need to create/make any changes to the role.

4.10.3 Document Reviewer

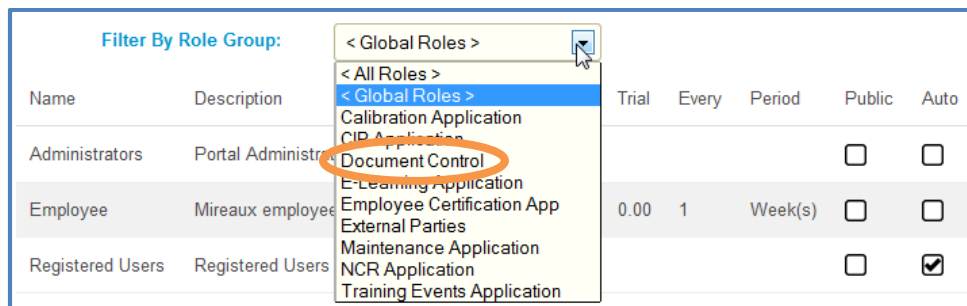
The Document Reviewer is given documents to review. Normally, Reviewers are given documents that belong to their working area; therefore the Document Reviewer role is actually named after each of the Categories created in the module. This will help assigning Reviewers to a certain category so that they can review the appropriate documents.

Document Reviewer roles may have already been created for you when Web QMS was deployed. To add, edit or remove these roles, follow the steps:

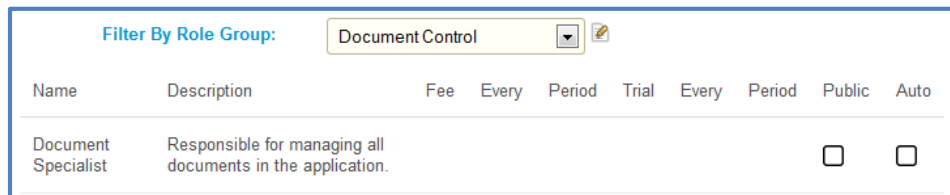
GO to **Admin/Security Roles**



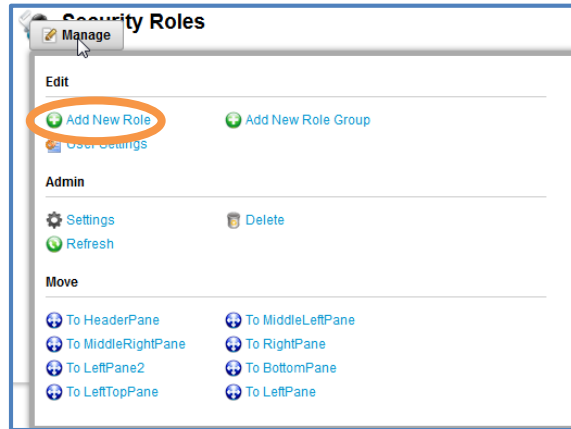
When you see the roles screen, SELECT **Document Control** from the **Filter by group** mega menu.



REVIEW **Document Reviewer** roles in existence.



If you wish to add a role, CHANGE **Mode** to Edit, then CLICK **Manage** and Add New Role:

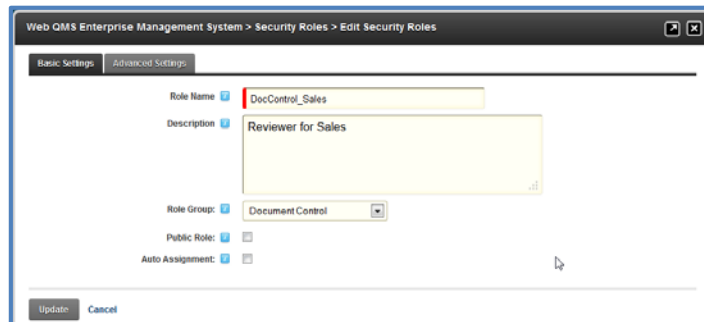


When naming the role, you must use the following structure:

DocControl_XXXX

XXXX is the name of the department or process you wish to assign Reviewers for.

COMPLETE the rest of the **Parameters**. Make sure to SELECT **Document Control** under the Role Group field and do not CHECK the **Public Role** field or the **Auto Assignment** field.



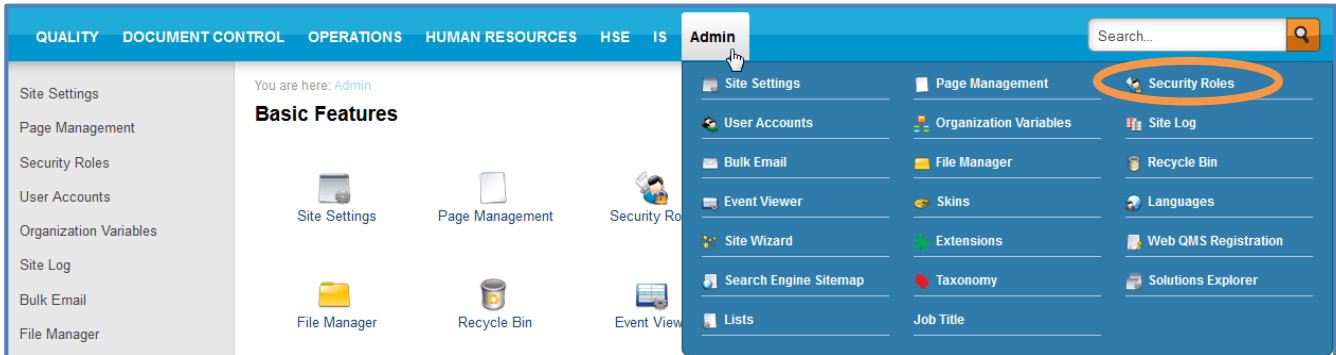
CLICK **Update** when you are done.

To edit a role name or description, CLICK the Manage button next to the Role, where you will see all the parameters in editable mode.

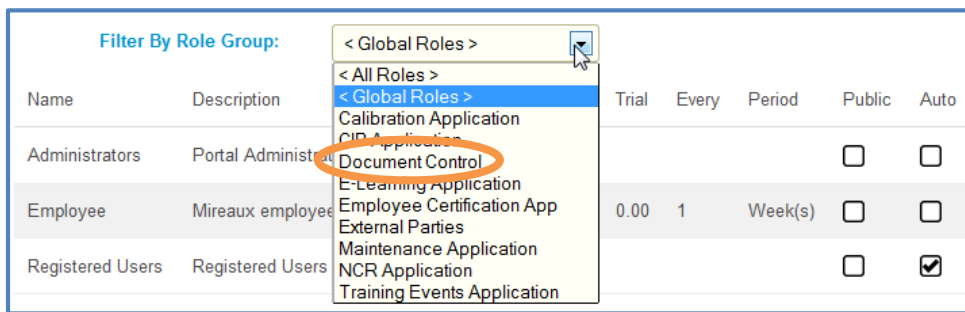
4.10.4 Assigning Users To Master Document Roles

The Web QMS **Administrator** has the capabilities of assigning **Master Document** roles to the appropriate users. Follow these steps to add roles:

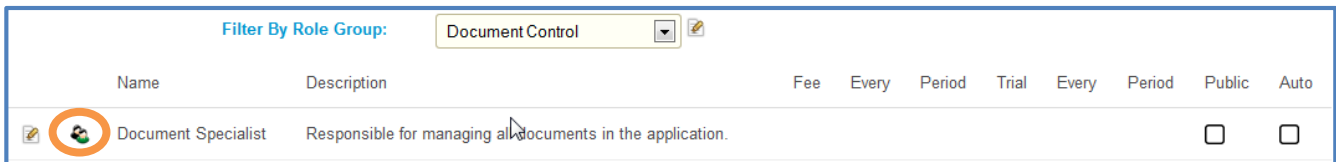
GO to **Admin/Security Roles**



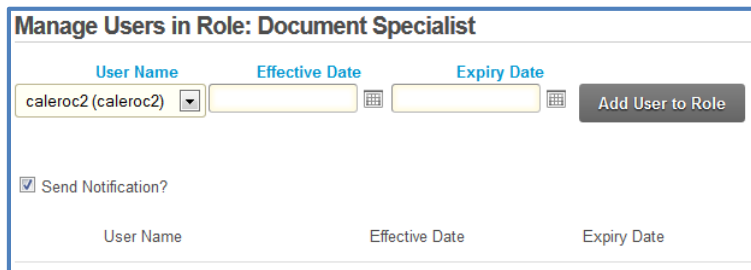
When you see the roles screen, **SELECT Document Control** from the **Filter by group** mega menu.



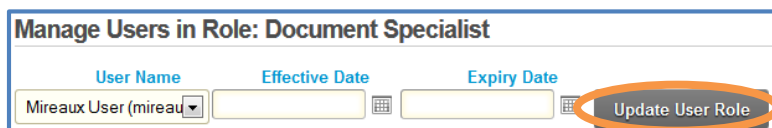
In **Edit Mode** you should see the list of roles with pencil and people icons. **CLICK** the people icon to add users.



You will see a screen similar to this:



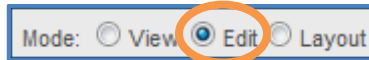
SELECT Users from the **User Name** mega menu and **CLICK** the **Add Users to Role** link.



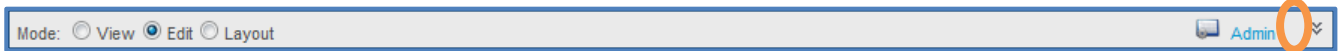
4.10.5 Inserting The Module To Display Documents

As an Administrator, you can add a module to display documents as needed. Follow these steps to add modules:

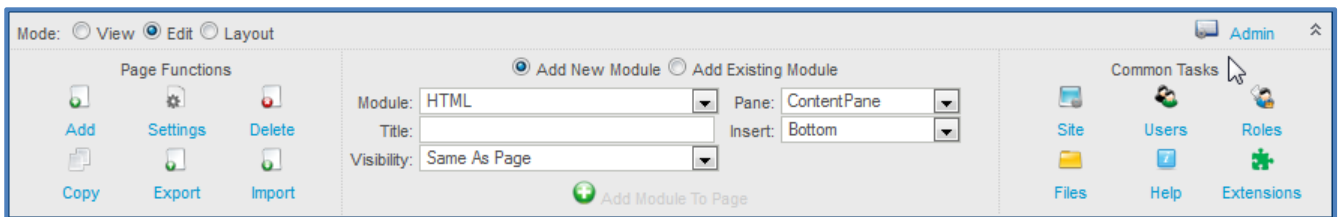
LOCATE the **Page** that you wish to add the module to. Make sure you are in **Edit Mode**.



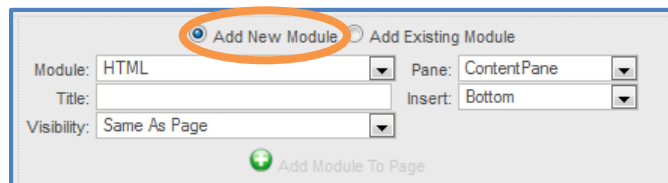
CLICK the **Expand Button** on the top right corner of the page to open the Control panel.



This is the control panel:

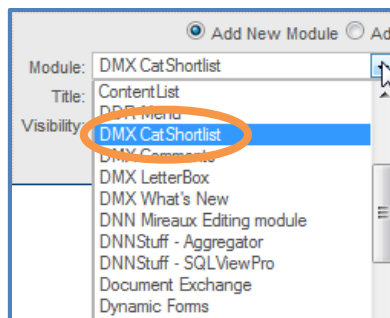


In the middle page of the control panel, SELECT **Add New Module**.



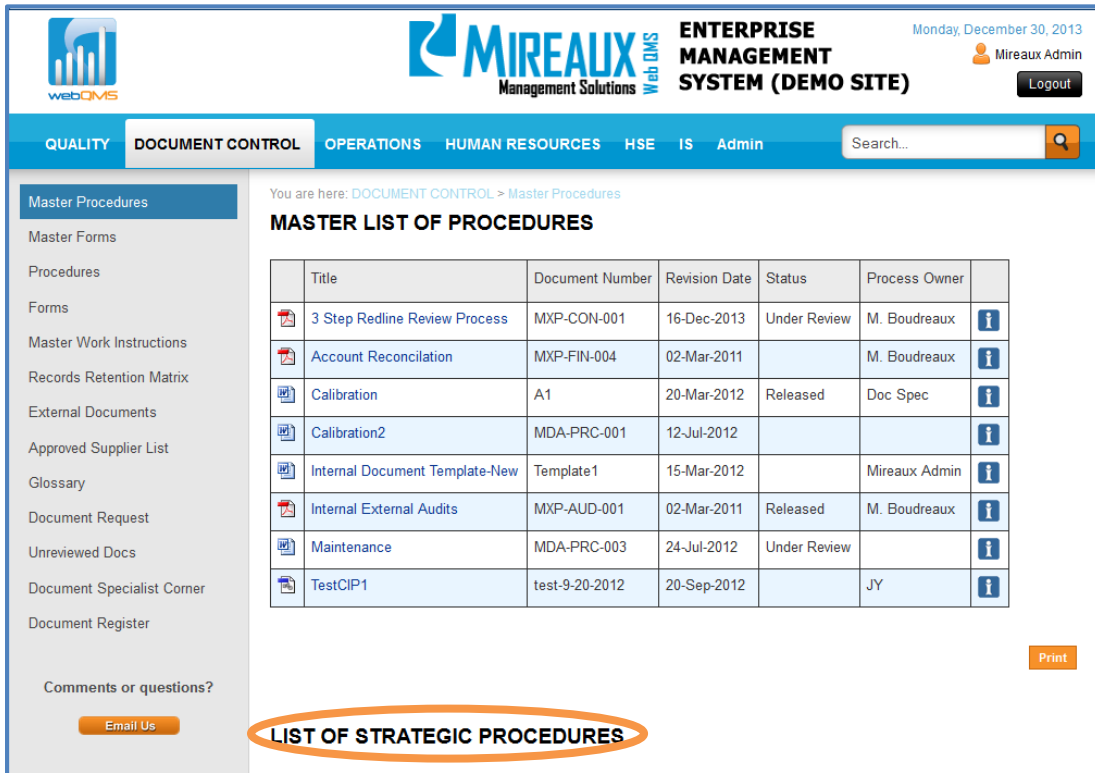
Below **Add New Module**, there are five fields that must be entered.

- **Module:** SELECT **DMX Category Shortlist** from the mega menu.
- **Pane:** SELECT the **Pane** of the page that you wish to put this module into from the mega menu.
- **Title:** ENTER the **Module Title**.
- **Insert:** SELECT the **Position** that you wish to put the module from the mega menu.
- **Visibility:** SELECT **Same As Page** or **Page Editor Only**. If you are not ready to show this module to the users, SELECT **Page Editor Only** until you finish editing.

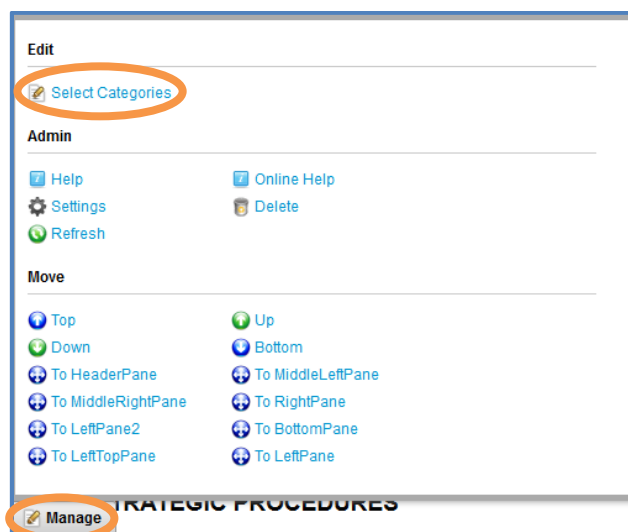


4.10.6 Assigning Categories Of Documents To Show In Module

Once you have finished adding the module to a page, you are now ready to assign categories of documents to show in the module.



PLACE **Cursor** on **Manage** next to the module title and a mega menu will open. CLICK **Select Categories** from the menu.



You can **SELECT Categories** of the documents which will be displayed in the module. CHECK **Inclusive** when you want all the selected categories to be satisfied.

Select Categories

- Forms
- Procedures
- Work Instructions
- Policies
- Manuals
- Drawings
- Administrative
- Auditing
- Human Resources
- General
 - Finance
 - Consulting
 - MIS
 - Web QMS
 - IT
 - Training Services
 - Sales
- Job Titles
 - Software Developer
 - Director of Finance and IT
 - Consultant
 - Lead Auditor
 - E-Learning Specialist

Inclusive:

Update Cancel

CLICK **Update** to save the information.

5.0 REVISION LOG

DATE	SECTION	DESCRIPTION OF CHANGE	APPROVED BY
07/26/2011	All	Original Issue of MMS-WQM-204 Master Doc Admin Manual and MMS-WQM-205 Master Docs User Manual	M. Boudreaux
08/09/2011	All	MMS-WQM-204 add WebDAV and Support Instructions	M. Boudreaux
08/18/2011	5.3	MMS-WQM-204 add information to subscribe users to Unreviewed Documents folders.	M. Boudreaux
01/20/2012	All	MMS-WQM-205 added screenshots and explanations.	M. Boudreaux
01/23/2012	All	MMS-WQM-204 edit the content in all sections to fit in the current application. Redone most of the screenshot and text explanation.	M. Boudreaux
03/07/2012	4.3	MMS-WQM-204 updated the screenshots. Add the introduction about new feature of showing the approved version to employee role when the new version is under reviewing.	M. Boudreaux
03/09/2012	4.6	MMS-WQM-205 added note about the new feature of showing the approved versions to employee role when the new version is under reviewing.	M. Boudreaux
03/21/2012	4.1 and 4.3	MMS-WQM-204 revised the content in these two sections, added a lot more explanation about the procedures-	M. Boudreaux
05/01/2012	4.7 and 5.0	MMS-WQM-204 added 4.7 and 5.0	M. Boudreaux
01/31/2014	All	Revision and integration of MMS-WQM-204 and MMS-WQM-205. Released as MXM-WQM-502 Master Docs Application Manual.	M. Boudreaux
06/01/2014	All	Revision, editing, and formatting completed throughout the Master Docs Application Manual	M. Boudreaux



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