

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.

QUALITY	DOCUMENT CONTROL	PERATIONS IS HUMAN RE	SOURCES SALES
Create a CIP	Master Procedures	늘 Master Forms	Master Work Instructions
Status Repo	Master Proc - Administrative	Master Forms - Administrative	Master WIs - Administrative
Advanced Se	Master Proc - Auditing	Master Forms - Auditing	Master WIs - Consulting
KPIs	Master Proc - Consulting	Master Forms - Consulting	Master WIs - Finance
Action Items	Master Proc - Finance	Master Forms - Finance	Master WIs - IT
	Master Proc - HR	Master Forms - HR	Master WIs - Sales
	Master Proc - IT	Master Forms - IT	Master WIs - Web QMS
	Master Proc - Sales	Master Forms - Sales	🔡 Records Matrix
Find	Master Proc - Training	Master Forms - Training	External Documents
CIP	Master Proc - Web QMS	Master Forms - Web QMS	
Commer			Approved Supplier List
Commer	🧕 Glossary	💋 Document Request	Unreviewed Docs
-	Document Specialist		
	Corner		

- **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.





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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.



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	PERATIONS HUMAN RESOU	RCES HSE IS Admin	Master Procedures
Master Procedures	🖮 Master Forms	Procedures	Master Forms
aster Proc - Auditing	Master Forms - Auditing	Proc - Administrative	
aster Proc - Consulting	Master Forms - Consulting	Proc - Auditing	Master Work Instructions
laster Proc - Finance	Master Forms - Finance	Proc - Consulting	
Master Proc - MIS	Master Forms - MIS	Proc - Finance	Policies
laster Proc - Sales	Master Forms - Sales	Proc - Human Resources	
Master Proc - Training	Master Forms - Training	Proc - MIS	Records Matrix
ervices	Services	Proc - Sales	Estant Barriste
		Proc - Training Services	External Documents
Forms	Master Work Instructions	Records Retention Matrix	Approved Supplier List
orms - Administrative	🗾 External Documents	📌 Approved Supplier List	
Forms - Auditing	Glossary	Document Request	Glossary
Forms - Consulting	- · · · · · · · · · · · · · · · · · · ·		
	Unreviewed Docs	Document Specialist	Document Request
Forms - Human Resources		Corner 	
	Document Register		Unreviewed Docs
Forms - Sales			Desument Openialist Con
orms - Training Services			Document Specialist Con

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

MAS	MASTER LIST OF PROCEDURES									
	Title	Document Number	Released Date	Process Owner	Management Sponsor					
1	3 Step Redline Review Process	MXP-CON-001	31-Jul-2011	M. Boudreaux	M. Boudreaux	0				
1	Documents & Record Control	MXP-ADM-001	31-Jul-2011	M. Boudreaux	M. Boudreaux	0				
7	General Accounting Functions	MXP-FIN-001	02-Mar-2011	M. Boudreaux	M. Boudreaux	0				
1	Human Resources	MXP-HRS-001	02-Mar-2011	M. Boudreaux	M. Boudreaux	0				

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.



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

Calibration					Calibratio	n				
					F 📄 🗟	<u>i</u>				
Document Number	MXP-ADM-	006			Documer	nt Number	MXP-ADM-	006		
Release Date	Monday, De	ecember 17,	2012		Release	Date	Monday, D	ecember 17, 2	2012	
Process Owner	M. Boudrea	aux			Process	Owner	M. Boudrea			
Management Sponsor	M. Boudrea	aux				nent Spon				
Author	Amy					nent spon		JUA		
Created	6/2/2013 6	:59 PM			Author		Amy			
Categories	Procedure	s, Administra	tivo		Created		6/2/2013 6	:59 PM		
Remarks	Troccourc.	5,710111115010			Categorie	es				
Remarks		[15		Remarks	1				
Versions					Versiers					
Version Revision Las	st Modified	Form Title	Size	Download	Versions Version	Revision	Last Modified	Form Title	Size	Down
3 6/2	2013	Calibration	239.7 KB	9	3		6/2/2013	Calibration		
2 11/	14/2012	Calibration	243.1 KB	-	3		0/2/2013	Campration	239.7 KB	10
1 11/	10/2012	Calibration	242.3 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:

- **Jownload 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.

	Filter list on:
Name	Size Modified
3 Sten Redline Poview Process	102 KB 8/9/2013
Auri Download File	412 KB 12/16/2013
🔁 Audit 🗳 Mail Me	225 KB 6/2/2013
🔂 Audit 🖂 Mail	622 KB 12/14/2013
🔁 Audit 🖉 View	367 KB 12/14/2013

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.

ibration		
Details		
Details		
Full Path		
	cuments/Procedures/Calibration.docx	
Details		
Author	Miriam Boudreaux	
Last Modified	3/21/2012 3:30:26 PM	
Version	5	
Size	12.7 KB	
First Uploaded	3/21/2012 3:30:26 PM	
Keywords		
Categories	Procedures	
Filename	Testing 2012-3.docx	
Remarks		
Document Number	A1	
Release Date	2012-03-20 00:00:00	
Process Owner	Doc Spec	
Management Sponsor	Doc Spec	
Doc Revision	1	
Status		
Status		
Not Approved		

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:

NEW DOCUMENT REQUEST
Your Document has been sent for review and approval. Thank You for your submission.
Upload Another File

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:

There are documents waiting for your action
support@mireauxms.com
Sent: Tue 1/24/2012 8:27 AM
Dear user,
The following documents need your review:
Test file 2012 link: <u>http://www.webbasedqms.com/Default.aspx?tabid=575&EntryId=176</u>
Kind regards,
Mireaux Admin
Mireaux Enterprise Management System

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.

Master Procedures	DOCUMENT CONTROL O	PERATIONS IS HUMAN F	RESOURCES SALES Admi
Master Forms	Master Procedures	Master Forms	Master Work
Master Work Instructions	Master Proc - Auditing	Master Forms - Auditing	Master WIs - Administrative
Policies	Master Proc - Consulting Master Proc - Finance	Master Forms - Consulting Master Forms - Finance	Master Wls - Finance Master Wls - П
Records Matrix	Master Proc - HR	Master Forms - HR	Master WIs - Sales
External Documents	Master Proc - IT Master Proc - Sales	Master Forms - IT Master Forms - Sales	Master Wls - Web QMS
Approved Supplier List	Master Proc - Training Master Proc - Web QMS	Master Forms - Training Master Forms - Web QMS	Records Matrix
Glossary			External Documents
Document Request	Approved Supplier List	Glossary	💋 Document Request
Unreviewed Docs		Corner	



You will see a screen similar to this:

UNREVIEWED DOCUM	ENTS				
Folder		Sea	rch Ad	lmin Helj	p
 ☑ Recycle Bin Q. Search Results ☑ My unapproved items ✓ Subscribed Content 	Name		Size	Modified	*

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.

UNREVIEWED DOCU	IMENTS	
Document Exchange		Search Admin Help
 Recycle Bin Search Results My unapproved items 	Name Background Check	Size Modified
Subscribed Content		

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**.



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

UNREVIEWED DOCUMENTS				
Editing: Chrysanthemum.jpg (Wor Folder: Forms	d Document)			
Upload/Choose item				
Core Metadata				
Custom	Examinar No se ha seleccionado ningún archivo.			
Permissions	Examinar No se na seleccionado ningun archivo.			
Categories				
	Cancel	Next		

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

Editing: Chrysanthemum.jpg (Wor Folder: Forms	d Document)	
Upload/Choose item	Type:	Word Document -
Core Metadata	Title:	Background Check
Custom	Author: Keywords:	M. Boudreaux MXF-HRS-108
Permissions	Versions to keep:	-1
Categories	Remarks:	not good
	Thumbnail:	📃 Use Thumbnail
		Examinar No se ha seleccionado ningún archivo.
		Cancel Previous Next Finish



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Upload/Choose item Core Metadata Custom Permissions Categories	Document Number Revision Date Process Owner Doc Revision Status Management Sponsor Last Review Date Next Review Date	MXF-HRS-108
--	---	-------------

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

Editing: Chrysanthemum.jpg (Word Folder: Forms	Document)			
Upload/Choose item Core Metadata Custom Permissions Categories	Filter By Group: < Global Roles > View Edit Approve Administrators All Users Imployee Registered Users Users Username: Add			
Cancel Previous Next Finish Editing: Chrysanthemum.jpg (Word Document) Folder: Forms				
Upload/Choose item Core Metadata Custom Permissions Categories	Vork Instructions Work Instructions Policies Manuals Drawings Administrative Administrative Vertility Human Resources Image: Im			

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.



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E.	Download File
Ľ	Mail Me
	Mail
B	Edit Attributes
O	New Version
	Сору
0	Recover
۲	Hard Delete
8	Lock
I	Approve
۷	Subscribe
۲	Subscription Manager
t	Show Direct Link
t	Navigate
R	Properties

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.

UNREVIEWED DOCUMENTS					
Item		Sear	rch Help		
 Unreviewed Documents Consulting Search Results Non-approved items Subscribed Content 	Name	Filter list on:	Modified		

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

You have approved documents	
support@mireauxms.com	
Sent: Tue 1/24/2012 1:00 PM	
To:	
Dear user,	
The following documents have been approved by you:	
doc-for-reviewer	
link: http://www.webbasedqms.com/Default.aspx?tabid=575&EntryId=179	
Kind regards,	
Mireaux Admin	
Mireaux Enterprise Management System	

Printed copies are considered uncontrolled



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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.



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OCUMENT SPECIALIST CORNER	DOCU	MENT SPECIALIST CO	RNER		
		New Item (Unknown Type)			
ing: New Item (Unknown Type)	Folder:	😼 File Upload	-		×
er: Document Specialist Work Area	File	G V E + Libraries	s > Documents > + +	Search Documents	P
		Organize • New fold	der)H •	CI 0
le Folder Hyperlink		✓☆ Favorites ■ Desktop	Documents library Includes: 2 locations	Arrange by: Fo	older 🔻
Choose		Downloads Recent Places Control Places Documents Documents Music Portures Videos Note: Recent Places Documents Documents	Name Adde Captivite Cached Projects Camtaxia Studio My Addee Captivite Projects Any Projects Any Projects Prinnale Prinnale Cattornale	Date modified 1/11/2012 3/37 PM 12/22/2011 10:77 12/24/2011 4/17 PM 7/8/2011 12:39 PM 1/25/2012 5/04 PM 7/8/2011 12:39 PM 12/12/2011 10:10	File folder File folder File folder File folder
Cancel Next				Open C	• Cancel

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.

DOCUMENT SPECIALIST CORNER
Editing, New Item (Unknown Type) Folder: Document Specialist Work Area
File Folder Hyperlink
Examinar. UsingFileZilla.pdf
Cancel

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:



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QUALITY	DOCUMENT CONTROL	OPERATIONS HUMAN RESOURCES H
Master Procedu Master Forms	res	are hera: DOCUMENT CONTROL > Document Specialist
Procedures Forms		ing: TestDoc(2) (Text Document) fer: Document: Specialist Work Area
Master Work In: Records Retenti		Core Meta Data
External Docum Approved Suppli Glossary	or List	Custom Attributes
Document Requ Unreviewed Doc	s 🔹 🖬	ermissions
Document Spec		
Comments o		Categories

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.



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😑 Core Meta Data	
Type: Title: Author:	PDF File VisingFileZilla Mireaux Admin
Keywords: Versions to keep:	-1
Remarks:	
Thumbnail:	Use Thumbnail Examinar_ No se ha seleccionado ningún archivo.

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 Owne**r: 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.

□ Custom Attributes	
Document Number	
Revision Date	
Process Owner	
Doc Revision	
Status	Select -
Management Sponsor	
Last Review Date	Clear
Next Review Date	Clear



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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:

Permissions				
Filter By Group:				_
Filler by Group:	< All Role	15 >		•
	View	Edit	Approve	
Action Verification Role				
Administrators	1	\checkmark		
All Users				
Calibration Technic	ian 🔳			
Certification Admin				
Certification Tech				
CIPAdmin				
Coordination Role				
DNNSTSManager				
DNNSTSReportAd	min 🔳			
Document Speciali	ist 🔽	1		
Employee				
EventAdmin				
First Aider				
Global Calibration Admin				
Investigation Verification Role				
Maintenance Admi	n 🔳			
Maintenance Supervisor				
Maintenance Tech				
MRB Team				
NCR Action Taker				
NCR Coordinator				
Registered Users				
Supplier				
TrainingSuperAdmi	in 🔳			
Unauthenticated	[[[[]]]			
Users				
Validation Role				
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.



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:



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Permissions		
Filter By Group:	Document Control	
۰ بالمحدود مالين المحدود المحدود	< All Roles > < Global Roles >	
Document Specialist	Calibration Application CIP Application	
Username:	Document Control E-Learning Application	
	Employee Certification App External Parties Maintenance Application	
Categories	NCR Application Training Events Application	

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.

Permissions				
Filter By Group:	Calibra	ation A	Application	
	View	Edit	Approve	
Calibration Technician				
Global Calibration Admin				
Username:			Add	
Approve 🗹				

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.

Filter By Group:	Calibra	ation A	pplication	•
	View	Edit	Approve	
Calibration Technician	v			
Global Calibratio Admin	n 📃	V		
Username:			Add	

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.



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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.

Folder		Search Admin Help
Master Documents Document Specialist Work Area		Silter liet on
Documents	Name	Size Modified
New Document Requests	🔁 3 Step Redline Review Process	296 KB 7/30/2012
Recycle Bin	AttenanceSheet	81 KB 7/30/2012
Categories	Calibration-JOHN	42-KB 7/30/2012
🙀 Forms	Calibration-MireauxUser	🙂 12 KB 7/30/2012
Procedures	Calibration-MireauxUser-2	
Work Instructions	Test CIP2	80 KB 9/20/2012
Policies	TestCIP1	80 KB 2/14/2013
A Manuals	🔁 UsingFileZilla	604 KB 12/27/2013
🕼 Drawings		604 KB 12/2/12013
🕼 Administrative		
🗟 Auditing 🗟 Human Resources		
General		
Job Titles		
Search Results		
Non-approved items	•	
My unapproved items		
Subscribed Content		



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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.

DOCUMENT SPECIALIST CORNER				
Folder		Search Admin Help		
Master Documents Master Documents Recycle Bin Recycle Bin Categories Categories Q Forms		Filter list on:		
	Name Ren Check and Sign Off Sheet	Size Modified		
	Procedure Title	30 KB 12/27/2013		

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**.

Procedures	Documents & Record Control	4 17 KB 3/7/2013
Work Instructions	Deternal External Audits	409 KB 5/13/2013
le	Maintenance	10 KB 7/12/2013
🛙 🖱 Categories	Master Documents Admin Manual_Draft	175 KB 7/30/2012



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

📩 Internal External Audits			
😬 Mair	8	Download File	
🖷 Mast	ď	Mail Me	Jal
	\geq	Mail	
	ď	Edit Attributes	
	٢	New Version	

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

DOCUMENT SPECIALIST CORNER
Editing: MDA-PRC-003-Maintenance.docx (Word Document) Folder: Procedures
Examinar. No se ha seleccionado ningún archivo.
Cance

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

DOCUMENT SPECIALIST CORNER		
Editing: MDA-PRC-003-Maintenance.docx Folder: Procedures	(Word Document)	
□ Core Meta Data		
⊟ Core Meta Data		
Туре:	Word Document -	
Title:	Maintenance	
Author: Keywords:	Mireaux Admin	
Versions to keep:	-1	
Remarks:		
Remarks:		
Thumbnail:	Use Thumbnail	
	Examinar_ No se ha seleccionado ningún archivo.	

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.

Custom Attributes	
Document Number	MDA-PRC-003
Revision Date	7/24/2012
Process Owner	
Doc Revision	
Status	Under Review 💌
Management Sponsor	Select
Last Review Date	Released Under Review Clear
Next Review Date	Clear

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.

DOCUMENT SPECIALIST CORNER				
Folder		Sear	ch Admin Help	
🗏 🚞 Master Documents		Filter list on:		
Document Specialist Work Documents	A Name		Size Modified	
Documents Documents Drawings	🔁 3 Step Redline Review Process		9 KB 12/16/2013	
	🖭 Calibration		80 KB 5/13/2013	
🗉 🚞 Manuals	Elibration2		10 KB //12/2013	
Procedures	Documents & Record Control		417 KB 3/7/2013	
🗉 🚞 Work Instructions	🔁 Internal External Audits		409 KB 5/13/2013	
∃ 🔲 New Document Requests 図 Recycle Bin	🖻 Maintenance		10 KB 7/12/2013	
Categories	Master Documents Admin Manual_Draft		175 KB 7/30/2012	

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



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There are documents waiting for your action support@mireauxms.com Sent: Tue 2/7/2012 1:25 PM To:
Dear user,
The following documents need your review:
test2012 link: <u>http://www.webbasedqms.com/Default.aspx?tabid=575&EntryId=188</u>
Kind regards,
Mireaux Admin
Mireaux Enterprise Management System

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:

		Search Admin Help
Master Documents		Filter liet on:
· 🥶 Recycle Bin B 🝧 Categories	Name	Size Modified
Search Results	Background Check	🐵 858 KB 3/7/2013 🏾 *

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

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

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:



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		Search Admin	Help
B Documents		Filter list on:	
Document Specialist Work Area Documents Document Requests Recycle Bin Categories Search Results	Name 편 Calibration Calibration-JOHN 편 Calibration-MireauxUser 편 Calibration-MireauxUser-2	Size Modified 80 KB 5/13/20 12 KB 7/30/20 12 KB 7/30/20 12 KB 7/30/20 12 KB 7/30/20	3 ^ 2 2
 Non-approved items My unapproved items Subscribed Content 		\triangleright	

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:

Document Number		A1				
Release Date		Tuesday, M	larch 20, 2012	2		
Process Owner		Doc Spec				
Management Spon	ISOF	Doc Spec				
Author		Miriam Bou	Idreaux			
Created		9/13/2012 1	1:58 PM			
Categories		Procedures				
Remarks				_		
	Las	t Modified	Form Title	Size	Dow	nload
Versions		t Modified	Form Title Calibration	Size 82.3 KB	Dow	nload
Versions Version Revision	12/3			82.3 KB		nload
Versions Version Revision 7	12/3 9/13	30/2013	Calibration	82.3 KB 23.7 KB	H	nload
Versions Version Revision 7 6	12/3 9/13 7/3(30/2013 3/2012	Calibration Calibration	82.3 KB 23.7 KB 12.7 KB		nload
Versions Version Revision 7 6 5	12/3 9/13 7/30 7/30	30/2013 3/2012 0/2012	Calibration Calibration Calibration	82.3 KB 23.7 KB 12.7 KB 83.2 KB	5	nloac
Versions Version Revision 7 6 5 4	12/3 9/13 7/30 7/30 7/30	30/2013 3/2012 0/2012 0/2012	Calibration Calibration Calibration Calibration	82.3 KB 23.7 KB 12.7 KB 83.2 KB 23.7 KB		nload

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**.

Master Procedures	
Master Forms	
Master Work Instructions	

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

ľ	MASTER LIST OF PROCEDURES						
		Title	Document Number	Revision Date	Status	Process Owner	
	7	3 Step Redline Review Process	MXP-CON-001	16-Dec-2013	Under Review	M. Boudreaux	ĺ

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:

₯ 1 comment(s) so far
Edit Latest version has a few spelling mistakes.
By Mireaux User on 12/29/2013

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

🖃 🚞 Master Documents
Documents
🗉 🚞 Drawings
🗉 🧰 Forms
🗉 🚞 Manuals
Procedures
🗉 🚞 Work Instructions
🗉 🚞 New Document Requests
🥶 Recycle Bin

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.

🗆 🚞 Master Documents	Filter list	on:
Document Specialist Work Area Documents	Name	Size Modified
Documents Documents	🔁 3 Step Redline Review Process	9 KB 12/16/2013 🔶
⊞ 🛅 Forms	Calibration	80 KB 12/30/2013
🕀 🛄 Manuals	Calibration2	10 KB 7/12/2013
Procedures	Documents & Record Control	417 KB 3/7/2013
Work Instructions	🔂 Internal External Audits	409 KB 5/13/2013
Recycle Bin	Maintenance	10 KB 7/12/2015

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:

Fo	older	_		Search Admin Help
8	This menu concerns th	e folder sel	ected on the left in the tree.	Filter list on:
\times	Mail	t Work A	Name	Size Modified
3	Edit Attributes		3 Step Redline Review Process	296 KB 7/30/2012
•	New •		AttenanceSheet	81 KB 7/30/2012
숬	Create •		Calibration-JOHN	😐 12 KB 7/30/2012
	Lock		Calibration-MireauxUser	😐 12-KB 7/30/2012
ő	Subscribe	1S	Calibration-MireauxUser-2	42-KB 7/30/2012
ē.	Subscription Manager	quests	Test CIP2	80 KB 9/20/2012
	Mandanda		TestCIP1	🐵 80 KB 2/14/2013
_	Navigate		🔁 UsingFileZilla	604 KB 12/27/2013
	Properties			
-	Fasic			
E	Manage Attributes			
2	Import			



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

Fo	lder		Sear	ch Admin Hel	р
•	Master Documents		Filter list on:		
	Document Specialist Work A Documents	Name		Size Modified	
	Drawings	🔁 3 Step Redline Review Process		296 KB 7/30/2012	^
	🗄 🚞 Forms	🔁 AttenanceSheet		81 KB 7/30/2012	
dh)	🗄 🚞 Manuals	Calibration-JOHN		12 KB 7/30/2012	
	Procedures	Calibration-MireauxUser		12 KB 7/30/2012	
	Work Instructions New Document Requests	Calibration-MireauxUser-2		12 KB 7/30/2012	
		(Maintenance		10 KB 12/30/2013	
_	Categories	Test CIP2		80 KB 9/20/2012	
-	📢 Forms	TestCIP1		80 KB 2/14/2013	
Ð	🔞 Procedures	🔁 UsingFileZilla		604 KB 12/27/2013	

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**.

Maintena Test CIP2	Download File Mail Me Mail
	Edit Attributes
0	New Version

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

You are here: DOCUMENT CONTROL > Document Specialist Corner DOCUMENT SPECIALIST CORNER					
Editing: MDA-PRC-003-Maintenance.docx (Word Document) Folder: Document Specialist Work Area					
□ Core Meta Data					
Туре:	Word Document				
Title: Author:	Maintenance-MireauxUser				
Keywords: Versions to keep:	-1				

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.



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Permissions			
Filter By Group:	< Glo	bal R	oles > 👻
١	View	Edit	Approve
Administrators	1	\checkmark	
All Users			
Employee	1		
Registered Users			
Unauthenticated Users			
	/iew	Edit	Approve
Mireaux User	1	1	
Username: mirea	auxuse	er	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 Vork 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
📩 AttenanceSheet	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

Printed copies are considered uncontrolled



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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.



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🖭 Maintenanc	9	Download File
Test CIP2	19	Mail Me
🗟 TestCIP1		Mail
🛃 UsingFileZill		Edit Attributes
	0	New Version
	Х	Cut
		Сору
	۲	Delete
	۲	Hard Delete
		Lock
	۷	Subscribe
	۲	Subscription Manager
	t	Show Direct Link
	t	Navioate
	Q	Properties

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.

laintenance			
Status	Under Rev	iew	
Status			
Permiss	sions		
	aux Admin, Adm	inistrators, Employee inistrators, Document	, Document Specialist Specialist
Version	S		
1 12/30/2013	Maintenance	9 3	
Log			
12/30/2013 4: 12/30/2013 4: 12/30/2013 4:	42:46 AM Edit 41:59 AM Edit 39:11 AM Edit 31:13 AM Edit 30:35 AM Add	Mireaux Admin Mireaux Admin Mireaux Admin	

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.

OCUMENT SPECIAL		
Folder Item		Search Admin Help
🗉 🚞 Master Documents		Filter list on:
Document Specialist Wo Documents	rk / Name	Size Modified
Documents Documents Documents	🔁 3 Step Redline Review Process	296 KB 7/30/2012
H D Forms	AttenanceSheet	81 KB 7/30/2012
🗉 🚞 Manuals	Calibration-JOHN	🙂 12 KB 7/30/2012
🗄 🚞 Procedures 🖙 3 Ste	p Redline Review Process	😳 12 KB 7/30/2012
U Work Instructions	Calibration-MireauxUser-2	12 KB 7/30/2012
Recycle Bin	S Maintenance	10 KB 12/30/2013

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.

Master Procedures	DOCUMENT C	ERATIONS HUMAN RESOU	RCES HSE IS Admin
Master Forms	Master Procedures	Master Forms	Procedures
Master Work Instructions	Master Proc - Consulting Master Proc - Finance	Master Forms - Consulting	Proc - Auditing
Policies	Master Proc - MIS	Master Forms - MIS	Proc - Consulting Proc - Finance
Records Matrix	Master Proc - Sales Master Proc - Training	Master Forms - Sales Master Forms - Training	Proc - Human Resources Proc - MIS
External Documents	Services	Services	Proc - Sales Proc - Training Services
Approved Supplier List	Forms	Master Work Instructions	Records Retention Matrix
Glossary	Forms - Auditing Forms - Consulting	 External Documents Glossary 	Approved Supplier List
Document Request	Forms - Finance	Jurreviewed Docs	Document Specialist
Unreviewed Docs	Forms - Human Resources Forms - MIS	Document Register	
Document Specialist Corner	Forms - Sales Forms - Training Services		

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:



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MA	MASTER LIST OF PROCEDURES						
	Title	Document Number	Revision Date	Status	Process Owner		
1	3 Step Redline Review Process	MXP-CON-001	16-Dec-2013	Under Review	M. Boudreaux	i	
1	Account Reconcilation	MXP-FIN-004	02-Mar-2011		M. Boudreaux	i	
B	Calibration	A1	20-Mar-2012	Released	Doc Spec	i	
B	Calibration2	MDA-PRC-001	12-Jul-2012			i	
M)	Internal Document Template-New	Template1	15-Mar-2012		Mireaux Admin	İ	
₽	Internal External Audits	MXP-AUD-001	02-Mar-2011	Released	M. Boudreaux	i	
B	Maintenance	MDA-PRC-003	24-Jul-2012	Under Review		i	

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 >					
Internal External Audits						
	1		1			
Document Number	MXP-AUD-001					
Release Date	Wednesda	y, March 02, 2011				
Process Owner	M. Boudre	aux				
Management Sponsor	M. Boudre	aux				
Author	Document Specialist					
Created	7/30/2011 10:28 AM					
Categories	Procedures, Administrative					
Remarks						
Versions						
Version Revision Las	t Modified	Form Title		Size	Download	
1 5/1:	3/2013	Internal External A	Audits	419.1 KB	-	
1						
Log Date/Time User Action						
Show Deleted Edit Te	mplates					
1 comment(s) so far						
Your name: Mireaux Admin						
Comment.						
Add Comment Cance						

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.

🧐 0 comme	nt(s) so far	
Your name:	Darshan	
Comment:		
Add Comment	Cancel	

You can enter any comments to the document in the Comment feild. 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:

定 2 comment(s) so far			
Edit Latest version has a	iew spelling mistakes.		
By Mireaux User on	12/29/2013		
Edit Some screenshot ar	e too small.		
By Mireaux User on	12/29/2013		

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.


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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.

An new Document Exchange Comment has been posted
support@mireauxms.com
Sent: Tue 1/31/2012 11:30 AM
To:
You have received a new comment for your document aaa
You can view this comment by clicking the following link:
http://www.webbasedqms.com/DOCUMENTCONTROL/DocumentDetails.aspx?EntryId=154.

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.

Folder		Search	Admin He	elp
Master Documents	1 103	r list on:		
Document Specialist Work Area Documents	Name		Size Modified	
Drawings	🔂 3 Step Redline Review Process	29	96 KB 7/30/2012	*

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.

Folder		Search Admin Help
Master Documents Documents		Filter list on: Client T
😠 🧰 Forms 😠 🛅 Manuals	Client And Referral Gift Guidelines	Size Modified
	Clien Document Handover	318 KB 10/23/2013
Discontrational Procedures	Client Satisfaction	225 KB 6/2/2013

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**:



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Folder		Search Admin Help
B Documents		Filter liet on:
Document Specialist Work Area Documents	Name	Size Modified
	🔁 3 Step Redline Review Process	296 KB 7/30/2012 🔺

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.

	×
-	
Title, Keywords, Contents O All Fields	
◎ This Folder	

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

Search			×
Search Advanced			
Field	Select	Search Term	Exact
Title 🗸	All Words 🗸		1
Title 👻	All Words 🔹		
Title 🗸	All Words 🗸		
Title 🗸	All Words 🗸]
Combination	OR 👻	All Versions	
Scope	🖲 This Folder 🔘 Wh	ole repository	
Search			

• 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.



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• **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.

		Search Ac	dmin Help
🖃 🚞 Master Documents	F	Filter list on:	
Documents Forms	Name	Size	Modified
Manuals	🔂 Candidate Registration and Access to e-Learning Test	611 KB	1/9/2013
🗉 🧰 Policies	🛃 E-Learning Configuration After Backup Restore	585 KB	11/20/2012
i Procedures	🔁 E-Learning Video Design and Development	331 KB	10/8/2013
🗉 🚞 Work Instructions	🛃 E-Learning Video Design and Development Form	31 KB	12/16/2013
New Document Requests	🔄 E-Learning Video Design and Development Review Log	27 KB	12/16/2013
🥑 Recycle Bin 🗄 🚰 Categories	Training Certificate - E-Learning	67 KB	12/16/2013
Search Results			
Subscribed Content			

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.



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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.



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Folder			Search Admin	Help
Master Documents		Filte 🛎	Categories 6	
Documents Document Requests	Name	1	Global Attributes	ed
i Recycle Bin	Document Specialist Work Area		Rss Settings)12
Categories	Documents		Notifications	/2013
Search Results	New Document Requests		Extensions	/2013
🤎 Subscribed Content			File Types	
		4	Run Scripts	
		3	Addon Settings	
		0	Empty Recycle Bin	
	i i	3	Recover	
		9	Main Options	
		٩,	Search Settings	
			Storage Settings	
		3	Upload Settings	

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.

Folder		Search Admin Help
B Master Documents		Filter list on:
Documents Document Requests	Name	Size Modified
i Recycle Bin	Document Specialist Work Area	7/2/2012
🗉 😇 Categories	Documents	43 MB 12/27/2013
Search Results	New Document Requests	43 KB 12/27/2013

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

DOCUMENT SPECIALIST	CORNER				
Folder			Search Admin	Hel	р
B Master Documents		Fi e 🗟	Categories		
Documents Image: Document Requests	Name		Grobal Attributes	ied	
Recycle Bin	Document Specialist Work Area	-	Rss Settings	012	-
🗉 😇 Categories	Documents		Notifications	/2013	3
 Search Results Subscribed Content 	New Document Requests		Extensions	//2013	3

You can add categories to the application as needed.



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You are here: DOCUMENT CONTROL > Document Specialist Corner		
ategories		
English (United States)		
	1	ar an
		0
G Forms		
Procedures WebQMS		
G Finance		
Auditing		
Consulting		
C Training		
Work Instructions		
Human Resources		
Administrative		
Manuals		
🙀 IT		
G Policies		
Gales Sales		
Expand All Collapse All Add Category Delete		
	Update	Cancel

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.

	English (United States)	•
WebCMS Weinsce Consulting Consulting Mis Mis Mis Mis Mis Mis Mis Mis Mis Mis		7
C Finance C Finance F		
Audiing Audiing MIS MIS Winnan Resources Manuals Manuals Policies Policies Manuals		
Consulting Consulting		
C MS C Training C Wonk Instructions C Administrative C Manuels C Monuels C T C Policies C C C New Category		
C Training C Training Human Resources C Annuals C Manuals C M		
G Work Instructions G Home Resources G Administrative G Manuals G T G Folicies C Folicies C Relians C Relians C Relians		
G Human Reported		
G Administrative G Manuals G IT G Policies C Policies New Contogory		
Canada Canada Pelidas New Celescos		
C IT Policies New Galegory		
New Cologory		
	🙀 Policies	
	New Category	
Expand Ali Collapse Ali (1Add Category Delete		
Expand All Collapse All Add Category Delete		
Expand All Collapse All (1Add Category Delete		
Expand All Collapse All Add Category Delete		
Expand All Collapse All Add Category Delete		
Expand All Collapse All Add Category Delete		
Expand All Collapse All Add Category Delete		
Expand All Collapse All Add Category Delete		
Expand All Collapse All Add Category Delete		
Expand All Collapse All Add Category Delete		
Expand All Collapse All Add Category Delete		
	Expand All Collapse All Add Category Delete	
		Update an

• **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**.

Ru	Script	
00: - 00: - 00: - \Empt 00: - 00: - 00: - 00: - 00: 00: 00:00: 00:00: 00:00:	tal ID: 2 10: 177 divi: ID: 177 divi: ID: 1949 ID: C: Viets L: VietsLwebbasedgms.com/httpdccs/DesktopModules/II/rig2mind/DKN\Admin\Scripts cycleBin.Bisocutes option: Exploy the recycle bin of the portal, i.e. had offete al detect items. training Bingman CNNI Models. BMC. Services. Scripts. SCripts. BRINGMIND.UNN.MODULES.DMK.CORE: 015 - Loading entry to recycle bin of the portal. 016 - Vietd detecting entry 131: Success 024 - Nied detecting entry 131: Success 032 - Finabel Annuma Script.	Succe

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.



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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:

QUALITY DOCUMENT CO	NTROL OPERATIONS	HUMAN RESOURCES	HSE IS	Admin	s	earch
Site Settings	You are here: Admin			Site Settings	📃 Page Management 🛛 🧲	🍇 Security Roles
Page Management	Basic Features			🍇 User Accounts	🗜 Organization Variables	👖 Site Log
Security Roles	_		0.0	🔤 Bulk Email	😑 File Manager	🛜 Recycle Bin
User Accounts			<u></u>	🜉 Event Viewer	🕳 Skins	Languages
Organization Variables	Site Settings	Page Management	Security Ro	🗽 Site Wizard	🖕 Extensions	
Site Log				Search Engine Sitemap	 Taxonomy 	Solutions Explorer
Bulk Email						
File Manager	File Manager	Recycle Bin	Event View	Lists	Job Title	

GO to Admin/Security Roles

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

Filter B	y Role Group:	< Global Roles >	2					
Name	Description	< All Roles > < Global Roles >		Trial	Every	Period	Public	Auto
		Calibration Application					-	-
Administrators	Portal Administr	Document Control					U	Π
Employee	Mireaux employee			0.00	1	Week(s)		
Registered Users	Registered Users	Maintenance Application NCR Application Training Events Application						

REVIEW **Document Reviewer** roles in existence.

Filte	er By Role Group:	Docume	nt Contro	ol	•					
Name	Description		Fee	Every	Period	Trial	Every	Period	Public	Auto
Document Specialist	Responsible for ma documents in the									

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



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Manage ty Roles	
Edit	
3 Add New Role	Add New Role Group
Cool Countgs	
Admin	
Settings	👸 Delete
🔇 Refresh	
Move	
🚱 To HeaderPane	🔂 To MiddleLeftPane
🚱 To MiddleRightPane	🚯 To RightPane
🚱 To LeftPane2	😝 To BottomPane
🚱 To LeftTopPane	🚱 To LeftPane

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.

Web QMS Enterprise Management System	n > Security Roles > Edit Security Roles	×
Basic Settings Advanced Settings		
Role Name 😰	DocControl_Sales	
Description 🔡	Reviewer for Sales	
Role Group: 🗾	Document Control	
Public Role: 🔝		
Auto Assignment: 😰		l⊋
Update Cancel		

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



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QUALITY DOCUMENT CO	ONTROL OPERATIONS	HUMAN RESOURCES	HSE IS	Admin		Search Q
Site Settings	You are here: Admin			Site Settings	Page Management	Security Roles
Page Management	Basic Features			luser Accounts	🗜 Organization Variables	¶∎ Site Log
Security Roles	_		0 -	🔤 Bulk Email	📒 File Manager	👸 Recycle Bin
User Accounts			<u></u>	🚃 Event Viewer	👦 Skins	🚽 Languages
Organization Variables	Site Settings	Page Management	Security Ro	🗽 Site Wizard	Extensions	
Site Log				Search Engine Sitemap	- — — — — — — — — — — — — — — — — — — —	Solutions Explorer
Bulk Email	-		- <u>.</u>			
File Manager	File Manager	Recycle Bin	Event View	Lists	Job Title	

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

Filter By Role Group:		< Global Roles >	Z					
Name	Description	< All Roles > < Global Roles > Calibration Application		Trial	Every	Period	Public	Auto
Administrators	Portal Administ	CIP Application Document Control						
Employee	Mireaux employee	E-Leanning Application Employee Certification App External Parties		0.00	1	Week(s)		
Registered Users	Registered Users	Maintenance Application NCR Application Training Events Application						

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

Filter By R	tole Group:	Document Control									
Name	Description			Fee	Every	Period	Trial	Every	Period	Public	Auto
Document Specialist	Responsible for m	anaging al Gocuments in th	e application.								

You will see a screen similar to this:

Manage Users in Ro	le: Document Special	ist	
User Name caleroc2 (caleroc2)	Effective Date	Expiry Date	Add User to Role
Send Notification?			
User Name	Effective Da	ite	Expiry Date

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

Manage Users in Role: Document Specialist					
User Name	Effective Date	Expiry Date			
Mireaux User (mireau		Update User Role			



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.

			-	4
Mode:	◎ View	💭 Admin	×	

This is the control panel:

Mode: 🔘 Vie	ew 🖲 Edit 🔘	Layout				l.	Admin 🛠
	Page Function	5	Add New Module O Add Existing Module			Common Tas	ks 🔎
5		5	Module: HTML Pane: ContentPane			&	ີ 🚱
Add	Settings	Delete	Title: Insert: Bottom]	Site	Users	Roles
		5	Visibility: Same As Page		<u> </u>		*
Сору	Export	Import	Add Module To Page		Files	Help	Extensions

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

Add New Module							
Module:	HTML	•	Pane:	ContentPane	-		
Title:			Insert:	Bottom	-		
Visibility:	Same As Page	•					
C Add Module To Page							

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.

QUALITY DOCUMENT O	ONTROL	OPERATIONS HUMAN RE	SOURCES HSE	IS Admir	n s	Search	-
Master Procedures Master Forms		re here: DOCUMENT CONTROL > Ma STER LIST OF PROCE					
Procedures		Title	Document Number	Revision Date	Status	Process Owner	
Forms	1	3 Step Redline Review Process	MXP-CON-001	16-Dec-2013	Under Review	M. Boudreaux	i
Master Work Instructions	1	Account Reconcilation	MXP-FIN-004	02-Mar-2011		M. Boudreaux	A
Records Retention Matrix	P	Calibration	A1	20-Mar-2012	Released	Doc Spec	A
External Documents	W	Calibration2	MDA-PRC-001	12-Jul-2012			A
Approved Supplier List		Internal Document Template-New	Template1	15-Mar-2012		Mireaux Admin	R
Glossary		Internal External Audits	MXP-AUD-001	02-Mar-2011	Released	M. Boudreaux	ß
Document Request Unreviewed Docs		Maintenance	MDA-PRC-003	24-Jul-2012	Under Review		ß
Unreviewed Docs Document Specialist Corner		TestCIP1	test-9-20-2012	20-Sep-2012		γ	
Document Specialist Corner Document Register			1001 0 20 2012	20 000 2012			

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

Edit		
Select Categories		
Admin		
🚺 Help	Online Help	
Settings	👸 Delete	
🔇 Refresh		
Move		
🔞 Тор	🚱 Up	
🕑 Down	Bottom	
🚯 To HeaderPane	🚯 To MiddleLeftPane	
🚱 To MiddleRightPane	😝 To RightPane	
🚱 To LeftPane2	😯 To BottomPane	
🚯 To LeftTopPane	🚯 To LeftPane	

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.



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O a la at O ata mania a
Select Categories
- Forms
Procedures
🔲 Work Instructions
🔲 Policies
🔲 Manuals
- 🔲 Drawings
- 🔲 Administrative
- 🔲 Auditing
- 🔲 Human Resources
🖻 🔲 General
- 🔲 Finance
- 🔲 Consulting
- 🔲 MIS
- 🔲 Web QMS
🔲 IT
- 🔲 Training Services
- Sales
General 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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