

SOLABS QM10: PROCESS Section Privileges

CONTENTS

Introduction	1
Privileges in the PROCESS Section	1
PROCESS Section Privileges Table	2
PROCESS Section Privileges Graphic	2
Process Roles Meaning & Examples	3
Assigning PROCESS Permissions & Privileges.....	3
Assigning Process Roles to Users.....	3
Adding/Removing Users from a Process Role.....	4
Assigning Process Privileges.....	5

Introduction

The intent of this document is to address the setup and maintenance of privileges in the **PROCESS** section of **SOLABS QM10**. Assigning permissions/privileges allows the ability to have different levels of access for users within the system.

Privileges in the PROCESS Section

The four available permission levels in the **PROCESS** section are **Act On**, **Act On & Reassign**, **Modify** and **Administer**.

Note: The terms **privileges** and **permissions** are used interchangeable in this document. Privileges build cumulatively on one another, granting all lower-level privileges automatically upon assignment of a higher-level privilege.

Upon initial installation, some privileges are set by default but can be changed as needed:

- **SOLABS General User** is a generic role assigned to all users. It is set to allow just the minimum permission level of **Act On**. It is provided as a “start-up” role and should ideally be replaced with appropriate Security or Function Roles for your organization that will grant Act On permissions, and then removed.
- **SOLABS System Administrator** is a system role available to assign to those in your organization who will administer users, roles custom lists and system configurations. It is set to allow the maximum permission level of **Administer**.

PROCESS Section Privileges | Table

PRIVILEGE LEVEL	ACTIONS POSSIBLE WITH THIS PRIVILEGE/PERMISSION LEVEL
ACT ON	View process, start process, act on process, get link, email link, link documents, link processes, modify descriptions, summary report, remove links
ACT ON & REASSIGN	ALL of the above, PLUS reassign tasks assigned to me, move out of waiting and view audit trail
MODIFY	ALL of the above, PLUS modify values, reassign any process task, manage the linking of documents, processes, and description of linked items on <i>closed</i> processes
ADMINISTER	ALL of the above, PLUS cancel processes, manage user privileges, and modify values in <i>closed</i> processes

PROCESS Section Privileges | Graphic

		ACT ON	ACT ON & REASSIGN	MODIFY	ADMINISTER
PRIVILEGE REQUIRED TO...	View	✓	✓	✓	✓
	Start Process	✓	✓	✓	✓
	Act On	✓	✓	✓	✓
	Get Link	✓	✓	✓	✓
	Email Link	✓	✓	✓	✓
	Link Documents	✓	✓	✓	✓
	Link Processes	✓	✓	✓	✓
	Modify Description	✓	✓	✓	✓
	Summary Report	✓	✓	✓	✓
	Remove Links	✓	✓	✓	✓
	Reassign Tasks Assigned to me		✓	✓	✓
	Move Out of Waiting		✓	✓	✓
	Audit Trail		✓	✓	✓
	Modify Values			✓	✓
	Reassign a Process Task			✓	✓
	Manage Closed Process: --Link Documents --Link Process --Modify Descriptions of Linked Items			✓	✓
	Cancel				✓
	Manage Privileges				✓
Modify Value in Closed Process				✓	

Process Roles | Meaning & Examples

Process Roles are provided along with a Process APP when it is deployed. These Process Roles are assigned to users to allow them to be selected as to act on corresponding Process Workflow Steps. The names of these Process Roles are abbreviated in SOLABS QM10 Process Role list. The table below provides an example to help illustrate how the Process (PR_) Roles are identified:

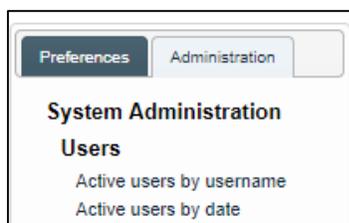
SOLABS QM10 ABBREVIATION	MEANING
PR_CC_Owner	Process (PR), Change Control (CC), Change Control Owner
PR_CC_RA	Process (PR), Change Control (CC), Regulatory Affairs (RA)
PR_DEV_QA_Approver	Process (PR), Deviation (DEV), Quality Assurance (QA), Approver
PR_DOC_COORD	Process (PR), Document Control (DOC), Document Coordinator (COORD)
PR_DOC_TRAIN_COORD	Process (PR), Document Control (DOC), Training Coordinator (TRAIN_COORD)

Assigning PROCESS Permissions & Privileges

Privileges can be handled three ways with regards to the PROCESS section; both are detailed below:

1. Through **User Creation** or **Modification (Create User** or **User > Modify)**: This method assigns privileges to Users as you create/modify them, and is useful if you know the roles of the users in your workplace.
2. Through **Active PR Roles > View > Add/Remove Users**: This method allows the update of a Process Role to add or remove multiple users all at once.
3. Though **Process > Quick Access Menu > Manage Privileges**: This method assigns Process Roles to all users with the same Function and/or Security Roles, and is useful if want to assign the roles to all users with the same Job Function or in the same organizational area all at once.

Assigning Process Roles to Users



To assign one or more Process (PR) Roles to an Active User, go to **System Administration > Users** and choose one of the options to access Active Users.

Click the **Modify** option next to the listing for the User you would like to assign a Process Role to display the **Setup > User > Modify** screen.

The **Roles Assignment** section of the **Setup > User > Modify** screen includes the **Available** Process (PR) Roles for the deployed SOLABS QM10 Process APPs.

Select the Process Roles to be added for this User and then click the **+ADD** button. This will move them to the **Assigned** box.

There will be a **Remove** option beside the new listing in case it was added in error.

To save the change, click **Submit**. At that point the **Assigned Roles** section of the screen will highlight the Role that was **Added**. Click **Confirm**, enter a **Reason for Change** and then click **Confirm All**. The Process Role is now assigned to the User.

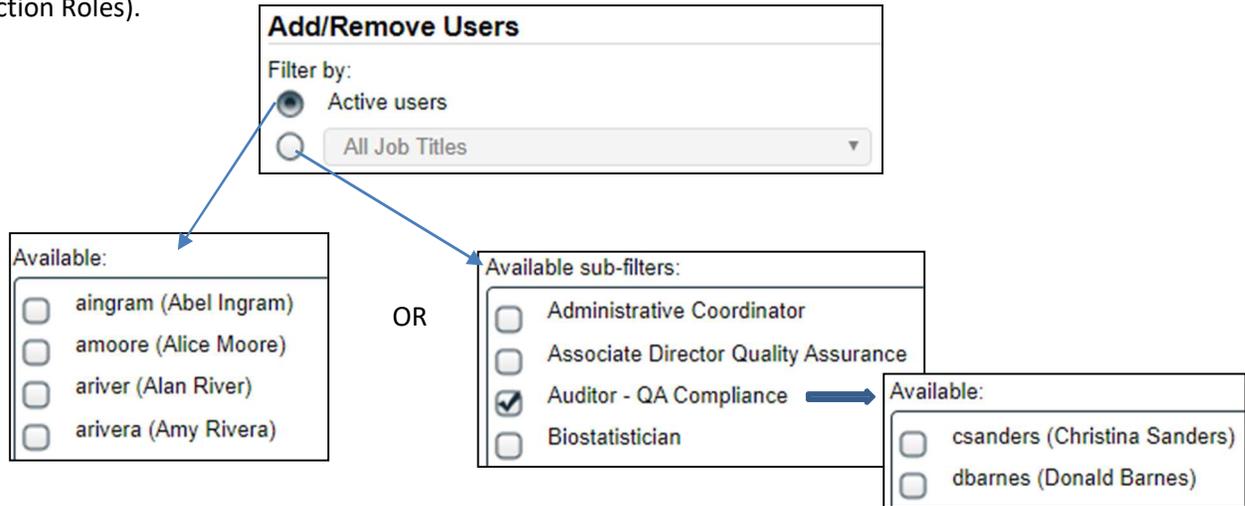
Adding/Removing Users from a Process Role

A Role can be modified to add or remove multiple users. Clicking on that option will bring up the **Add/Remove Users** screen. Choose the **View** option for the Process Role for which you would like to add or remove users.

Active PR roles by name			
Name: PR_CAPA_Approver	Type: Process Role (PR)	Status: Active	View Modify
Name: PR_CAPA_Owner	Type: Process Role (PR)	Status: Active	View Modify
Name: PR_CAPA_Reviewer	Type: Process Role (PR)	Status: Active	View Modify

From the right-hand **Role Actions** menu, choose **Add/Remove Users**.

The Filter by options allow searching for **Available** people from the entire **Active users** list or searching for them after filtering by **All Job Titles** (which is a list of active Function Roles).



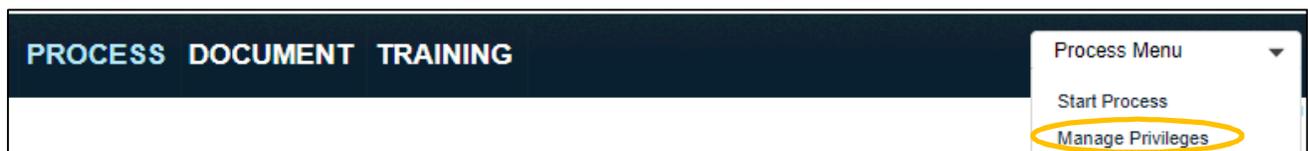
Select the User(s) and click **+ADD** to move them to the **Assigned** box. There is a **Remove** option beside each Username in the Assigned box.



Assigning Process Privileges

SOLABS System Administrators **Manage Privileges** for the PROCESS Section by choosing that option from the Quick Access **Process Menu**. This brings up the **Process > Manage Privileges > View by Role** screen.

By default, SOLABS System Administrators have full privileges in the PROCESS Section. The SOLABS General User has the lowest level of permission, which is **Act On**. Choose a **Process Type** and click on **Modify** to make changes. The **Change Privileges** section will list all active Roles available in this instance of SOLABS QM10.



Process > Manage Privileges > View by Role

Status: Custom

Available Processes

Process Type:

Current Privileges

Role	Act On	Act On & Reassign	Modify	Administer
SOLABS System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SOLABS General User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Change Privileges

All instances of the process and all its associated Related Items
 All instances of the process only

Role	Act On	Act On & Reassign	Modify	Administer	
<input type="checkbox"/> SOLABS System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
<input type="checkbox"/> SOLABS General User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Remove
<input type="checkbox"/> FCT_Administrative Coordinator					
<input type="checkbox"/> FCT_Associate Director Quality Assurance					
<input type="checkbox"/> FCT_Auditor - QA Compliance					
<input type="checkbox"/> FCT_Biostatistician					
<input type="checkbox"/> FCT_Change Control Coordinator					
<input type="checkbox"/> FCT_Clinical Operations					
<input type="checkbox"/> FCT_Complaint Coordinator					
<input type="checkbox"/> FCT_Director Clinical Operations					

Select all *Deselect all*

	Act On	Act On & Reassign	Modify	Administer
Clear all except 'Administer'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

All users have the SOLABS General User role by default, which allows the Act On privilege. It is recommended as a best practice to replace this role with appropriate Security or Function Roles for your organization to reflect those who will be able to Start a Process, then click the **Remove** option next to **SOLABS General User**.

Determine which users should have the **Act On & Reassign** or **Modify** privileges. Select the Security or Function roles associated with those users, then select the **Act On & Reassign** or **Modify** box at the bottom before clicking the **Update** option in the lower right corner of the screen.

Change Privileges

All instances of the process and all its associated Related Items
 All instances of the process only

Role	Act On	Act On & Reassign	Modify	Administer	
<input type="checkbox"/> SOLABS System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remove
<input type="checkbox"/> SOLABS General User					
<input type="checkbox"/> FCT_Administrative Coordinator					
<input checked="" type="checkbox"/> FCT_Associate Director Quality Assurance					
<input checked="" type="checkbox"/> FCT_Auditor - QA Compliance					
<input type="checkbox"/> FCT_Biostatistician					
<input type="checkbox"/> FCT_Change Control Coordinator					
<input type="checkbox"/> FCT_Clinical Operations					
<input type="checkbox"/> FCT_Complaint Coordinator					
<input type="checkbox"/> FCT_Director Clinical Operations					

Select all Deselect all Act On Act On & Reassign Modify Administer
 Clear all except 'Administer' Set Privileges: **Update**

Click **Submit** to verify the changes that have been made. The **Process Types**, Roles **Added** and Roles **Removed** will be displayed. All changes will be displayed for verification. Click **Confirm** to save the changes.

Available Processes

Process Type:
 Document Control
 Change Privileges of : All instances of the process and all its associated Related Items

Current Privileges

Added

Role	Act On	Act On & Reassign	Modify	Administer
FCT_Associate Director Quality Assurance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FCT_Auditor - QA Compliance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Removed

Role	Act On	Act On & Reassign	Modify	Administer
SOLABS General User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Modified
<empty>

Not Logged in Audit Trail

Confirm
Back to Edit
Cancel