

SOLABS QM 10: DOCUMENT Section: Document Ownership

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Introduction

Categories of Document Ownership can be established for documents in SOLABS QM 10 to help define the various aspects of Document Management and trigger related document management workflow Notifications. The following Document Ownership categories can be established as defaults for each Document Type.

- Originator (Author)
- Document Owner
- Document Coordinator

Document Ownership Settings for Document Types:

When creating a **Document Type** as part of **SETUP** activities, one of the sections to complete is the **Document Ownership** section. Each category can be set as mandatory, and default values can also be defined.

Document Ownership

Originator (Author)

Document Owner

Document Coordinator

- Originator (Author) – author of the document; defaults to the initiator but can be set to another User
- Document Owner - the person who holds responsibility for the actual “creation/maintenance” of the **content** of the document.
- Document Coordinator – the person facilitating the “processing/monitoring” of documents through their **workflows**.

When ownership categories are selected as Document Type defaults, they will be displayed for the author and must be filled in. If set as mandatory and can have default values.

Document Ownership

Originator (Author)

Mandatory

Default Value

Document Owner

Mandatory

Default Value

Document Coordinator

Mandatory

Default Value

When a Default Value is chosen for the **Originator**, a drop-down list of SOLABS QM 10 Users will be displayed to choose from.

When Default Values are chosen for the **Document Owner** and/or **Document Coordinator**, drop-down list of SOLABS QM 10 Functional (FCT) Roles will be displayed to choose from.

Document Owner

Mandatory

Default Value

FCT_Administrative Coordinator

FCT_Associate Director Quality Assurance

FCT_Auditor - QA Compliance

FCT_Change Control Coordinator

FCT_Director Engineering

Creating and Revising Documents – the Document Ownership fields:

If Document Ownership categories are not established at the Document Type level, they will not be required for authors to fill in – they will be grayed out.

Document Ownership

Originator (Author):

Document Owner:

Document Coordinator:

Users/roles can still be selected for Review Cycles and Approval Cycles after the Author Submits the document, but establishing document ownership would not be required.

When Document Ownership categories are established at the Document Type level, the author will be required to fill in the related information before they can **Submit** the new/revised document they are working on.

In the example below, all three categories were selected for this Document Type.

- All were established as mandatory, as identified by the asterisk
- A Default Value – FCT_Documentation Coordinator – was chosen for the Document Coordinator category. This can be changed at the document level.

Document Ownership

* Originator (Author):

* Document Owner:

* Document Coordinator:

→

dbarnes (Donald Barnes)
dflores (Denise Flores)
dkim (Doreen Kim)
drennold (Delores Rennold)
eblake (Evan Blake)

→

FCT_Engineering
FCT_Equipment Calibration Technician
FCT_Human Resources Specialist
FCT_Legal Counsel
FCT_Manager Development

If the person initiating the new/revised document is the Author, they will select themselves as **Originator (Author)**. If they are entering the metadata on behalf of someone else, they may select that person.

If the document being created/revised is a QC Laboratory Test Method or Specification, the Functional Role FCT_QC Manager might be selected as the Document Owner.

The Document Coordinator field has a default value in this case, it can be changed to another FCT Role if someone other than the person with the FCT_Documentation Coordinator role assignment will be managing the workflow of this particular document.

When Functional Roles are selected, anyone with that role assignment will receive related document workflow Notifications.