

SOLABS QM 10

Views | Detailed Descriptions

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In This Document

This document lists all User **Views** available in **SOLABS QM** and breaks down the internal software logic, or 'rules', by which the **Views** are sorted. It is intended to help clarify user expectations regarding what they can access using the various View menu options.

NOTE on Views

It may not always be evident to users why a document or a training activity, for example, either shows up in their **Views** or doesn't.

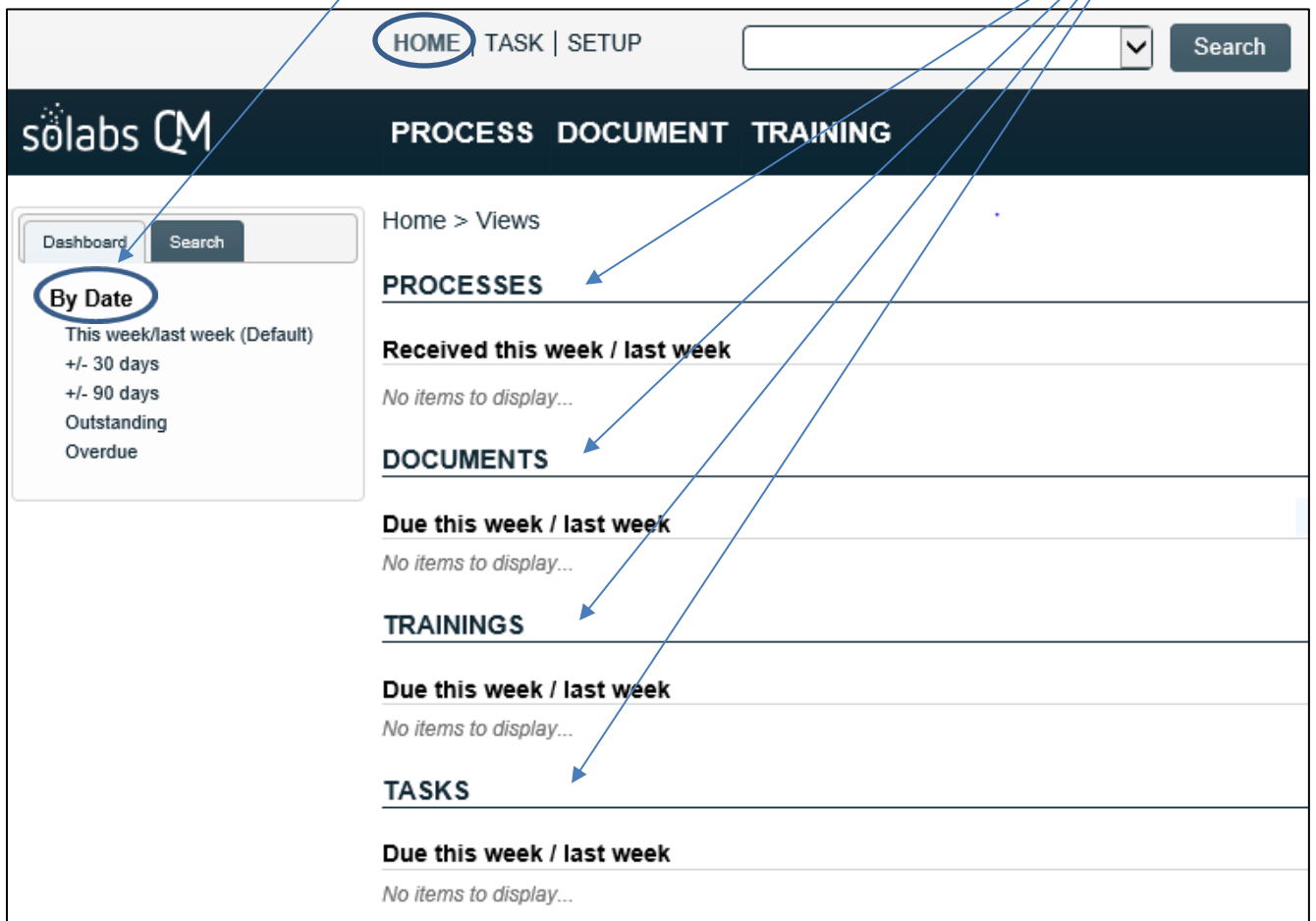
- Users may expect a **Document** to show up in a **View** and it does not, for example, because it is not yet **Effective**.
- Users may equally expect a **Training Activity** to show up in **Views** and it does not because, for example, a linked event that triggers the training may have not yet occurred.
- **Privileges are always applied** - Users cannot view listings for documents to which they do not have access/privileges.

Settings that are Consistent for all Views

- The week starts Sunday at midnight, and all named days of the week start at midnight.
- The definitions provided in this document apply to the User currently logged in, unless otherwise specified.
- When a named **Date** (i.e., **Completion Date**) is referred to under a category (i.e., **Training**), it is the date related to that category (i.e. **Training Completion date**), unless otherwise specified.

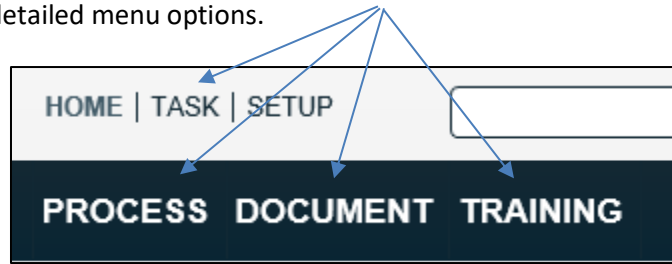
HOME - Home > Views - By Date

The **HOME** page **Views** are a compilation of the **Views** from each section. They are aggregated for Users on login and arrival at the **HOME** page, showing their pending actions for PROCESSES, DOCUMENTS, TRAININGS AND TASKS with menu options to view **By Date**.

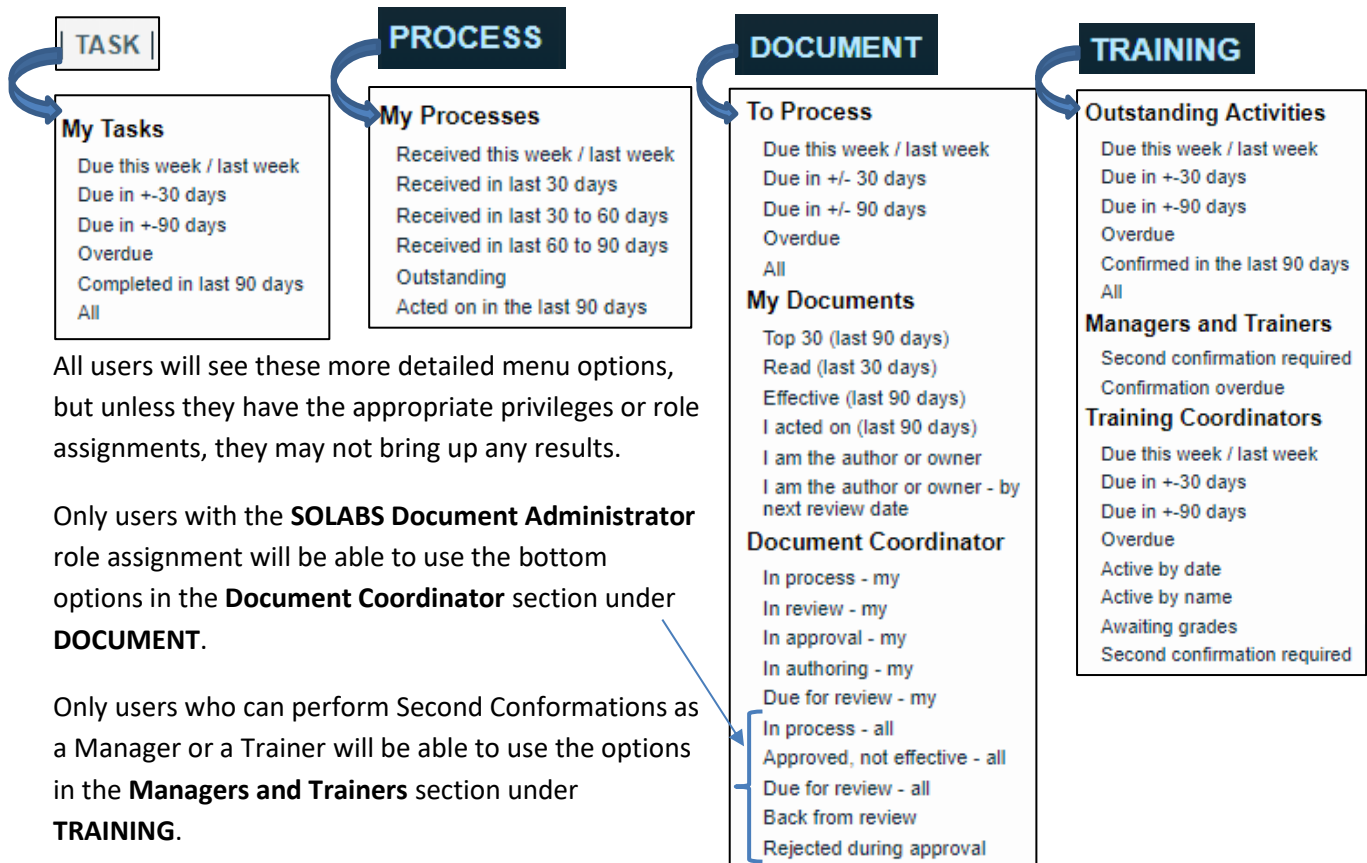


The screenshot shows the user interface for the HOME page. At the top, there is a navigation bar with 'HOME' circled in blue, followed by 'TASK | SETUP', a search input field, and a 'Search' button. Below this is a dark header with the 'solabs QM' logo and the text 'PROCESS DOCUMENT TRAINING'. The main content area is titled 'Home > Views'. On the left, there is a sidebar with a 'Dashboard' button and a 'Search' button. Below these, the 'By Date' filter is circled in blue, with a list of options: 'This week/last week (Default)', '+/- 30 days', '+/- 90 days', 'Outstanding', and 'Overdue'. The main content area is divided into four sections: 'PROCESSES', 'DOCUMENTS', 'TRAININGS', and 'TASKS'. Each section has a sub-header 'Received this week / last week' or 'Due this week / last week' and a message 'No items to display...'. Blue arrows point from the text in the paragraph above to the 'HOME' link, the 'By Date' filter, and the section headers for PROCESSES, DOCUMENTS, TRAININGS, and TASKS.

From the above **HOME** page View the User can click on **TASK**, **PROCESS**, **DOCUMENT** or **TRAINING** at the top of the screen to get more detailed menu options.



Notice the more detailed menu options that become available when choosing a specific QM 10 section. The logic for each of the **Views** in these tables are the same as the ones defined in the respective sections. Refer to those sections in this document for more information on the logic.



All users will see these more detailed menu options, but unless they have the appropriate privileges or role assignments, they may not bring up any results.

Only users with the **SOLABS Document Administrator** role assignment will be able to use the bottom options in the **Document Coordinator** section under **DOCUMENT**.

Only users who can perform Second Conformations as a Manager or a Trainer will be able to use the options in the **Managers and Trainers** section under **TRAINING**.

Only users with the **SOLABS Training Administrator** role assignment will be able to use the options in the **Training Coordinators** section under **TRAINING**.



Logic for the Section Views

TASK > Views > My Tasks

Due this week / last week	<p>All active ad-hoc task assignments and Process Secondary Task assignments</p> <ul style="list-style-type: none"> • Where User is set as Assignee <ul style="list-style-type: none"> ○ or where User is set as Originator and Status is Return to originator ○ or where a Role and any User are selected and the User holds that Role • Where Status of task is Not Started or In Progress • Where Task Group Parent Accessibility is Active • Where Estimated End Date or Start is set this week or last week
Due in + -30 days	<p>All active ad-hoc task assignments and Process Secondary Task assignments</p> <ul style="list-style-type: none"> • Where User is set as Assignee User <ul style="list-style-type: none"> ○ or where a Role and any User are selected and the User holds that Role ○ or where User is set as Originator and Status is Return to originator • Where Status of task is Not Started or In Progress • Where Task Group Parent Accessibility is Active • Where Estimated End Date or Start is set in last or next 30 days
Due in + -90 days	<p>All active ad-hoc task assignments and Process Secondary Task assignments</p> <ul style="list-style-type: none"> • Where User is set as Assignee User <ul style="list-style-type: none"> ○ or where a Role and any User are selected and the User holds that Role ○ or Where User is set as Originator and Status is Return to originator • Where Status of task is Not Started or In Progress • Where Task Group Parent Accessibility is Active • Where Estimated End Date or Start is set in last or next 90 days
Overdue	<p>All active ad-hoc task assignments and Process Secondary Task assignments</p> <ul style="list-style-type: none"> • Where User is set as Assignee User <ul style="list-style-type: none"> ○ or where User is in Assignee Role if User is any ○ or where User is set as Originator and Status is Return to originator • Where Status of task is Not Started or In Progress • Where Task Group Parent Accessibility is Active • Where Due Date set in the past
Completed in last 90 days	<p>All active ad-hoc task assignments and Process Secondary Task assignments</p> <ul style="list-style-type: none"> • Where User is set as Assignee User or where a Role and any User are selected and the User holds that Role • Where Task Group Parent Accessibility is Active, On Hold or Closed • Where End Date is set in last 90 days



All	<p>All active ad-hoc task assignments and Process Secondary Task assignments</p> <ul style="list-style-type: none"> • Where User is set as Assignee User <ul style="list-style-type: none"> ○ or where a Role and any User are selected and the User holds that Role ○ or where User is set as Originator and Status is Return to originator • Where Status of task is Not Started or In Progress • Where Task Group Parent Accessibility is Active • Where there is no End Date set
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PROCESS > Views > My Processes

Received this week/last week	<p>All active Processes</p> <ul style="list-style-type: none"> • Where User is set as Process Task Assignee User or where a Role and any User are selected and the User holds that Role • Where Process Task Start Date is set this week or last week <p>Results will be ordered by Process Task Creation Date, Chronological, Descending</p>
Received in last 30 days	<p>All active Processes</p> <ul style="list-style-type: none"> • Where User is set as Process Task Assignee User or where a Role and any User are selected and the User holds that Role • Where Process Task Start Date is set in last 30 days <p>Results will be ordered by Process Task Creation Date, Chronological, Descending</p>
Received in last 30 to 60 days	<p>All active Processes</p> <ul style="list-style-type: none"> • Where User is set as Process Task Assignee User or where a Role and any User are selected and the User holds that Role • Where Process Task Start Date is set in last 30 to 60 days <p>Results will be ordered by Process Task Creation Date, Chronological, Descending</p>
Received in last 60 to 90 days	<p>All active Processes</p> <ul style="list-style-type: none"> • Where User is set as Process Task Assignee User or where a Role and any User are selected and the User holds that Role • Where Process Task Start Date is set in last 60 to 90 days <p>Results will be ordered by Process Task Creation Date, Chronological, Descending</p>
Outstanding	<p>All active Processes</p> <ul style="list-style-type: none"> • Where User is set as Process Task Assignee User or where a Role and any User are selected and the User holds that Role • Where Process Task Start Date is set but End Date is empty <p>Results will be ordered by Process Task Creation Date, Chronological, Descending</p>



Acted on in the last 90 days	<p>All processes where status is In Process, Completed or Cancelled</p> <ul style="list-style-type: none"> • Where User is set as Process Task Username Executed • Where Process Task End Date is set in last or next 90 days <p>Results will be ordered by Process Task End Date, Chronological, Descending</p>
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DOCUMENT > Views > To Process

Due this week / last week	<p>All documents where status is Pending Review, Pending Approval, Pending Retire</p> <ul style="list-style-type: none"> • Where the named User is selected or a Role and any User are selected and the User holds that Role • Where the User Due Date is set this week or last week or if no Due Date but where Cycle Start Date is set this week or last week • Where the User has not yet performed the review/approval task <p>Results will be ordered by Cycle Start Date, Chronological, Descending</p>
Due in +/- 30 days	<p>All documents where status is Pending Review, Pending Approval, Pending Retire</p> <ul style="list-style-type: none"> • Where the named User is selected or where a Role and any User are selected and the User holds that Role • Where the User Due Date set in last or next 30 days or if no Due Date but where Cycle Estimated Start Date is set in last or next 30 days • Where the User has not yet performed review/approval task <p>Results will be ordered by User Due Date, Chronological, Descending</p>
Due in +/- 90 days	<p>All documents where status is Pending Review, Pending Approval, Pending Retire</p> <ul style="list-style-type: none"> • Where the named User is selected or where a Role and any User are selected and the User holds that Role • Where the User Due Date set in last or next 90 days or if no Due Date but where Cycle Estimated Start Date set in last or next 90 days • Where the User has not yet performed review/approval task <p>Results will be ordered by User Due Date, Chronological, Descending</p>
Overdue	<p>All documents where status is Pending Review, Pending Approval, Pending Retire</p> <ul style="list-style-type: none"> • Where the named User is selected or where a Role and any User are selected and the User holds that Role • Where the User Due Date set in the past • Where the User has not yet performed review/approval task <p>Results will be ordered by User Due Date, Chronological, Descending</p>
All	<p>All documents where status is Pending Review, Pending Approval, Pending Retire</p> <ul style="list-style-type: none"> • Where the named User is selected or where a Role and any User are selected and the User holds that Role



	<ul style="list-style-type: none"> Where the User has not yet performed review/approval task <p>Results will be ordered by User Due Date, Chronological, Descending</p>
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DOCUMENT > Views > My Documents

Top 30 (last 90 days)	<p>Up to 30 documents, of any Document Status where the User has opened/accessed the file in the last 90 days</p> <p>The Effective document is returned first. If an Effective status of the document does not exist, the document with the most recent Create or Modify Dates or the highest Internal Version of the following are returned:</p> <ul style="list-style-type: none"> Approved, Not Effective Pending Approval Pending Review Authoring
Read (last 30 days)	<p>A document at any status, where the User has opened/accessed the file in the last 30 days</p> <p>The Effective document is returned first. If an Effective status of the document does not exist, the document with the most recent Create or Modify Dates or the highest Internal Version of the following are returned:</p> <ul style="list-style-type: none"> Approved, Not Effective Pending Approval Pending Review Authoring
Effective (last 90 days)	<p>Any document that is at Approved & Effective status, where the effective date is today – 90 days</p> <p>Results will be ordered by the document Effective Date</p>
I acted on (last 90 days)	<p>A document at any status</p> <ul style="list-style-type: none"> Where the User is assigned as part of the Review or Approval Cycle Where the Review or Approval Cycle User Executed Date is today – 90 days <p>Results will be ordered by User Executed Date, Chronological, Descending</p> <p>The Effective document is returned first. If Effective does not exist, the document with the most recent Create or Modify Dates or the highest Internal Version of the following are returned:</p> <ul style="list-style-type: none"> Approved, Not Effective Pending Approval Pending Review Authoring



I am the author or owner	<p>A document at any status</p> <ul style="list-style-type: none"> • Where the User is the Author or Owner <p>Results will be ordered by most recent status date, Chronological, Descending</p> <p>Effective documents are returned first, unless documents of another status have more recent action dates – review, approval, etc.</p>
I am the author or owner - by next review date	<p>Documents at a status of Approved & Effective where the User is the Author or Owner</p> <p>Results will be ordered by document Next Review Date, Chronological</p>

DOCUMENT > Views > Document Coordinator

In process - my	<p>Documents at a status of Authoring, Pending Review or Pending Approval, where the logged in User – whether a Document Coordinator or not – is the Create Modify By User.</p> <p>Results will be ordered by document Create Modify Date, Chronological, Descending</p>
In review - my	<p>Documents at a status of Pending Review, where the logged in User – whether a Document Coordinator or not – is the Create Modify By User.</p> <p>Documents with the most recent Create or Modify Dates or the highest Internal Version of the following are returned, in order by Cycle Start Date, Chronological, Descending</p>
In approval - my	<p>Documents at a status of Pending Approval, where the logged in User – whether a Document Coordinator or not – is the Create Modify By User.</p> <p>Documents with the most recent Create or Modify Dates or the highest Internal Version of the following are returned, in order by Cycle Start Date, Chronological, Descending</p>
In authoring - my	<p>Documents at a status of Authoring, where the logged in User – whether a Document Coordinator or not – is the Create Modify By User.</p> <p>Documents with the most recent Create or Modify Dates or the highest Internal Version of the following are returned, in order by Create Modify Date, Chronological, Descending</p>
Due for review - my	<p>Documents at a status of Approved & Effective, where the logged in User – whether a Document Coordinator or not – is the Create Modify By User and where the Next Review Date is Today + 6 months.</p> <p>Results will be ordered by Next Review Date.</p>
<p>The following options will return results only for Users with the SOLABS Document Coordinator role assignment.</p>	
In process - all	<p>All documents at a status of Authoring, Pending Review or Pending Approval.</p> <p>Results will be ordered by document Create Modify Date, Chronological, Descending</p>



Approved, not effective - all	All documents at a status of Approved, Not Effective. Results will be ordered by the document Effective Date, Chronological, Descending
Due for review – all	All documents at a status of Approved & Effective, where the Next Review Date is Today + 6 months. Results will be ordered by Next Review Date.
Back from review (new with version 10.5)	All documents at a status of Pending Review, where at least one of the assigned Reviewers has chosen a Decision of either <ul style="list-style-type: none"> • Reviewed, see comments • Cycle stopped with comments
Rejected during approval (new with version 10.5)	All documents at a status of Pending Approval, where at least one of the assigned Approvers has chosen a Decision of Reject .

TRAINING > Views > Outstanding

Due this week / last week	Active Training Activities <ul style="list-style-type: none"> • Where the User has not completed training • Where the User Estimated End Date is set between next Saturday and the previous Sunday • If User Estimated End Date is not set, where Estimated User Start Date is in same range Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending
Due in + - 30 days	Active Training Activities <ul style="list-style-type: none"> • Where the User has not completed training • Where the User Estimated End Date is set between the previous 30 days and the next 30 days • If User Estimated End Date is not set, where Estimated User Start Date is in same range Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending
Due in + -90 days	Active Training Activities <ul style="list-style-type: none"> • Where the User has not completed training • Where the User Estimated End Date is set between the previous 90 days and the next 90 days • If User Estimated End Date is not set, where Estimated User Start Date is in same range Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending



Overdue	<p>Active Training Activities</p> <ul style="list-style-type: none"> • Where the User has not completed training • Where the User Estimated End Date is set in the past • If User Estimated End Date is not set, where Estimated User Start Date is in the past <p>Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending</p>
Confirmed in the last 90 days	<p>Active Training Activities</p> <ul style="list-style-type: none"> • Where the User has completed the training <p>Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending</p>
All	<p>Active Training Activities</p> <ul style="list-style-type: none"> • Where the User has not completed training <p>Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending</p>

TRAINING > Views > Managers & Trainers

Second confirmation required	<p>Active Training Activities established to require a Second Confirmation</p> <ul style="list-style-type: none"> • Where the User is set as Manager, Department Head or assigned as Trainer of Users assigned to the Training Activities <ul style="list-style-type: none"> ○ Managers and Department Heads will be able to provide second confirmation for Users reporting to them who are assigned End Users ○ Trainers will be able to provide second confirmation for any assigned End Users <p>Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending</p>
Confirmation overdue	<p>Active Training Activities established to require a Second Confirmation</p> <ul style="list-style-type: none"> • Where the User is set as Manager, Department Head or assigned as Trainer of Users assigned to the Training Activities <ul style="list-style-type: none"> ○ Managers and Department Heads will be able to provide second confirmation for Users reporting to them who are assigned End Users ○ Trainers will be able to provide second confirmation for any assigned End Users • Where User Estimated End Date is set in the past, or where no Estimated End Date is set, where the Estimated Start Date is in the past <p>Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending</p>



TRAINING > Views > Training Coordinators

Due this week/last week	<p>All active Training Activities</p> <ul style="list-style-type: none"> • Where any Users have not completed training • Where the User Estimated End Dates are set between next Saturday and the previous Sunday • If User Estimated End Date is not set, where Estimated User Start Dates are in same range <p>Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending</p>
Due in + - 30 days	<p>All active Training Activities</p> <ul style="list-style-type: none"> • Where any Users have not completed training • Where the User Estimated End Dates are set between the previous 30 days and the next 30 days • If User Estimated End Date is not set, where Estimated User Start Dates are in same range <p>Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending</p>
Due in + - 90 days	<p>All active Training Activities</p> <ul style="list-style-type: none"> • Where any Users have not completed training • Where the User Estimated End Dates are set between the previous 30 days and the next 30 days • If User Estimated End Date is not set, where Estimated User Start Dates are in same range <p>Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending</p>
Overdue	<p>All active Training Activities</p> <ul style="list-style-type: none"> • Where any Users have not completed training • Where the User Estimated End Dates are set in the past • If User Estimated End Date is not set, where Estimated User Start Dates are in the past <p>Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending</p>
Active by date	<p>All active Training Activities.</p> <p>Results will be ordered by Estimated End Date (or Estimated State Date where no Estimated End Date is set), Chronological, Descending</p>
Active by name	<p>All active Training Activities.</p> <p>Results will be ordered by Training Activity Name, alphabetical order, ascending</p>



Awaiting grades	All active Training Activities established to require a Grade. <ul style="list-style-type: none">• Where there are confirmed Users for whom a grade has not yet been entered. Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending
Second confirmation required	All active Training Activities established to require a Second Confirmation. Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending