SOLABS QM10: Guide for System Administrators – Maintaining Users, Roles and System Configurations

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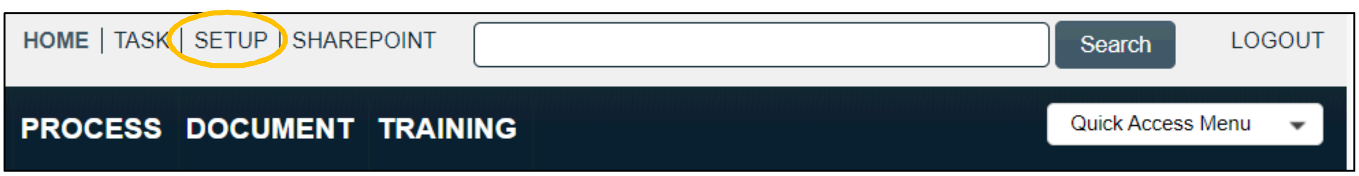
Purpose of this Guide

This guide is intended for "Super-Users" who are assigned the SOLABS System Administrator Role and who perform setup, maintenance and administration of Users, Roles, Role Assignments, Custom Lists, System Attributes and System Configurations in **SOLABS QM 10**. Refer to separate User Guides for Administration of the Process Section, Document Section and Training Section.

The SETUP Section

The **SETUP** section is used to manage **System Access** and **System Parameters**. It is available to Users who have been assigned the System Role of **SOLABS System Administrator**. Some System Administration tasks (Custom Lists, System Configurations) in the **SETUP** also support document management so are available to Users who have been assigned the System Role of **SOLABS Document Administrator**.



Selecting **SETUP** from the top menu, brings most users to their own **Setup > User > View** page. On this page, they can view their **User Account Details**, **User Account Settings**, **Company Structure Details** and **Assigned Roles**, as set by their System Administrator.

Setup > User > View

Status: Active

User Actions

Modify

Change Password

User Account Settings

Account Type: Standard

Login Type: Database

Sharepoint Access: N/A

Signature Graphic :

User Account Details

Username: gdixson

Full Name: Gretchen Dixson

Email Address: gdixson@solabs.com

Time Zone: US/Eastern (UTC-04:00)

Language: English

Alias: GD

Employee ID:

SOLABS Unique ID: 61l18ouy6

Company Structure Details

Department Head:

Manager: gbates (Guy Bates)

Job Title: Employee Orientation Training; QMS System Administrator

Organization: GDP Medical Products

Division: GDP Medical Device Products; GDP Pharmaceutical Products

Department: Information Systems & Technology

Sub-Department:

Assigned Roles

FCT_Employee Orientation Training
FCT_QMS System Administrator
PR_CCR_CCC
PR_DEV_Lead_Investigator
PR_DEV_QA_Approver
PR_DOC_Business_Owner
PR_DOC_COORD
PR_DOC_TRAIN_COORD
SEC_GDP Medical Device Products
SEC_GDP Medical Products
SEC_GDP Pharmaceutical Products
SEC_Information Systems & Technology
SOLABS Document Administrator

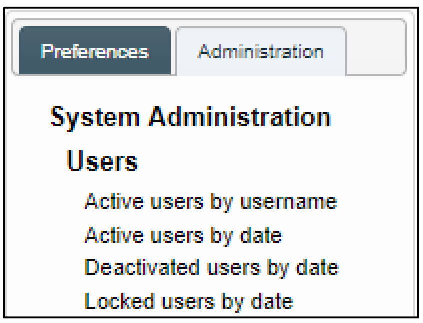
Most users only have the option to change languages (where available) and to modify their passwords. Super Users, however, have the option to do a lot of 'behind the scenes' User Management maintenance activities.

The User Management section of this guide will cover those maintenance activities that are available to System Administrators/Super Users.

Left- and Right-hand SETUP Menus

Sorting and Filtering Menus

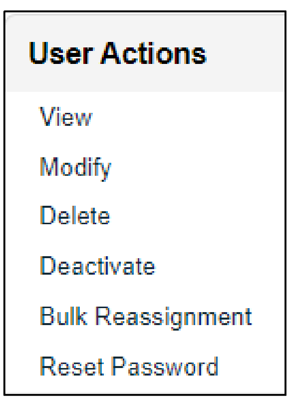
To the left, as consistent throughout the **SOLABS** interface, you have **Sorting and Filtering Menus**, in this case called **Preferences** and **Administration**.



Example: The left-hand menu options for **Users** allow sorting subsets of **Active Users** differently, as well as **Deactivated** and **Locked Users**.

Actions Menus

To the right, also consistent throughout the **SOLABS** interface, you have contextual **Actions Menus.**



Example: The right-hand menu options for User Management are the actions you can perform on Users — due to your **Administrator** role; not actions done by **Users** themselves.

In the **User Actions** menu, you can find **View User**, **Modify User**, **Delete User**, **Deactivate User** and **Bulk Reassignment**. These functions are covered in the User Management section.

If a User is locked, there will also be an **Unlock** option when accessing that user as an Administrator.

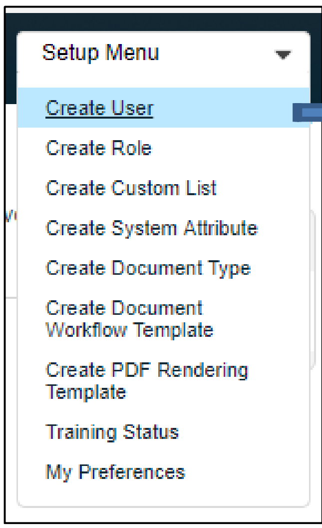
Starting with SOLABS QM 10.8, there is also a **Reset Password** option available for Database instances such as Validation Environments.

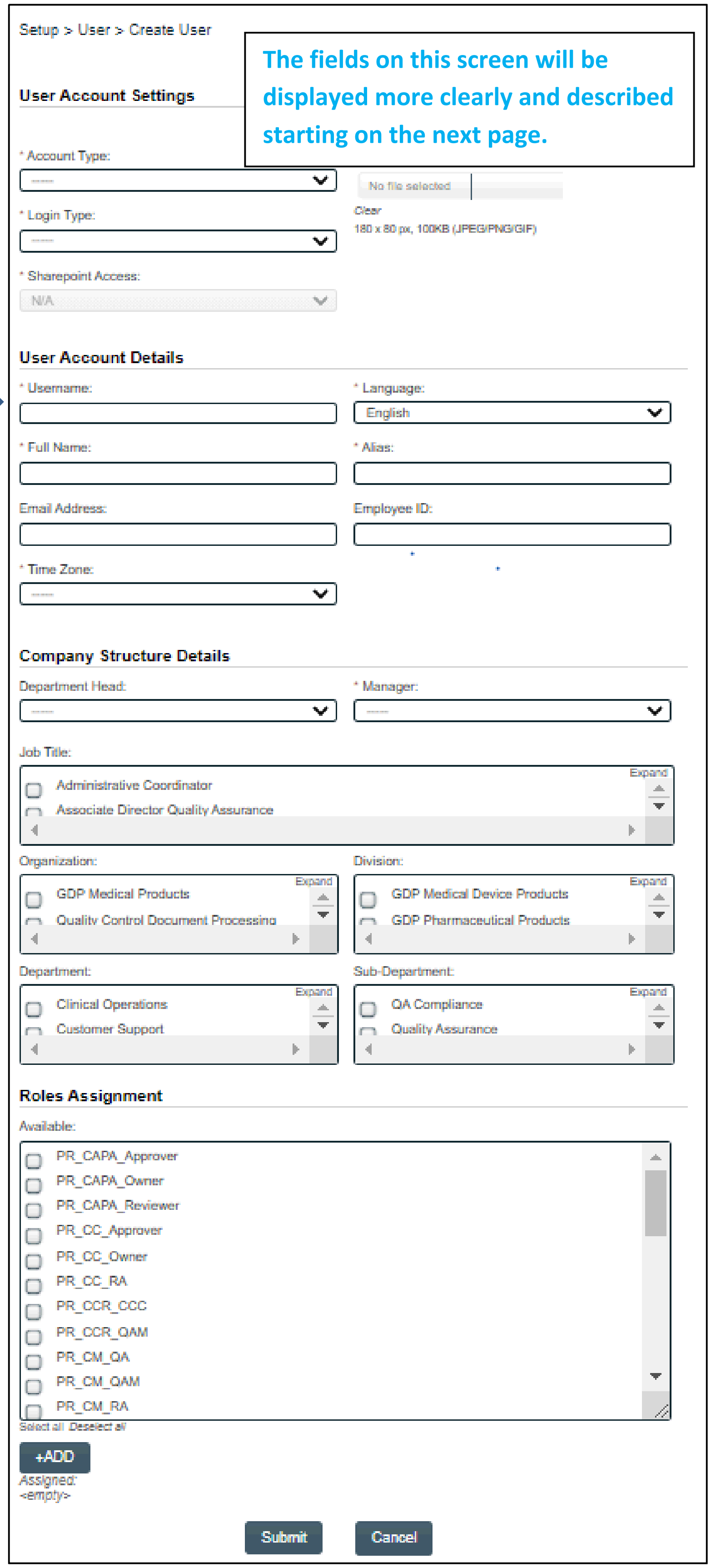
User Management

The following User Management actions require assignment of the System Role **SOLABS System Administrator**.

Create User

From the Quick Access menu, click **Create User**. The **Create User** page is then loaded. Required fields are identified by an asterisks (*).

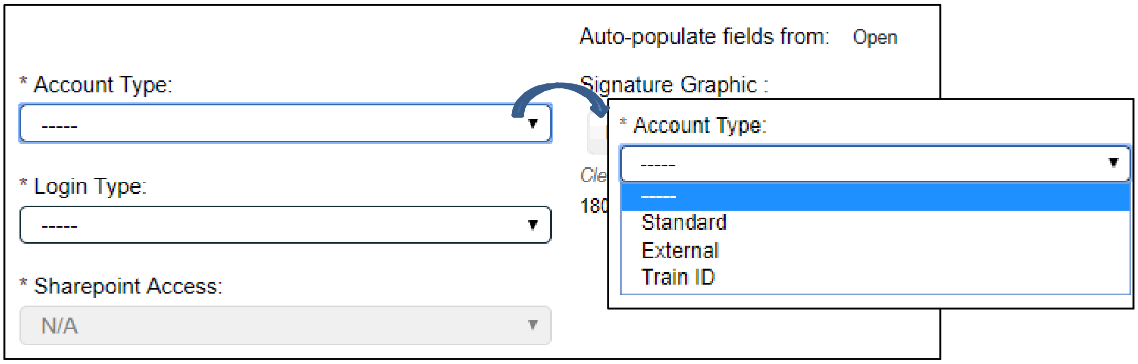




For some companies, some of the **User Account Details** may be populated automatically by a validated interface with the company HR system.

When completing this section manually, an **Auto-populate fields from** option is available. When opened, a list of active users is displayed. Selecting one of these users will auto-populate the fields with that same information; fields which may be different – Username, Full Name, Email Address, etc. - then need to be edited.

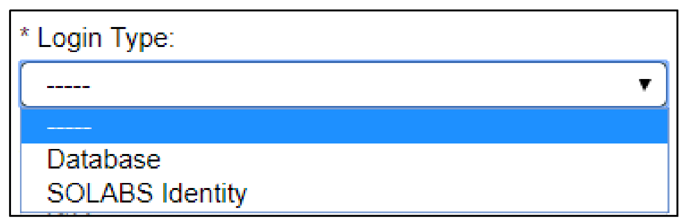
User Account Settings

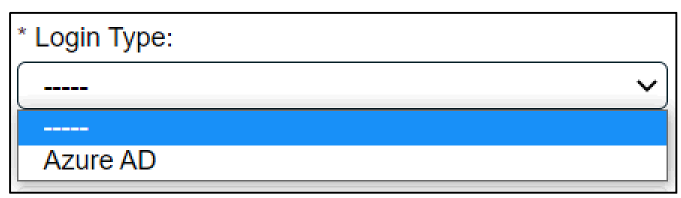


Account Type is a Single-item Selection field that has three choices.

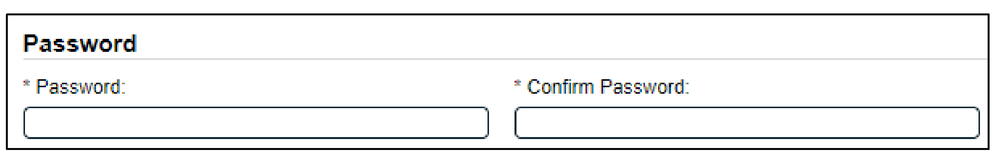
- **Standard** must be chosen for users who will take any actions in SOLABS QM (create or modify a document, review or approval a document, act on a process task, administer training activities, etc.).
- **External** can be used to grant limited permissions (such as to review/approve a document or process step) to outside contractors, auditors, consultants, etc.
- **Train ID** is used for those users who will only view content for the purposes of completing assigned training activities. It can also be used for external users who should be limited to only viewing documents.

Login Type is a Single-item Selection field. A Login Type of **Database** is typically used for Test, Sandbox or Validation instances of SOLABS QM. A Login Type of **SOLABS Identity** should be selected for Production instances of SOLABS QM 10. If you are using one of the Single Sign-On features such as AzureAD or OneLogin, you will see a related Login Type in place of SOLABS Identity.





When **Login Type** is **Database**, additional fields will be displayed to enter and confirm a Password for the user being created.

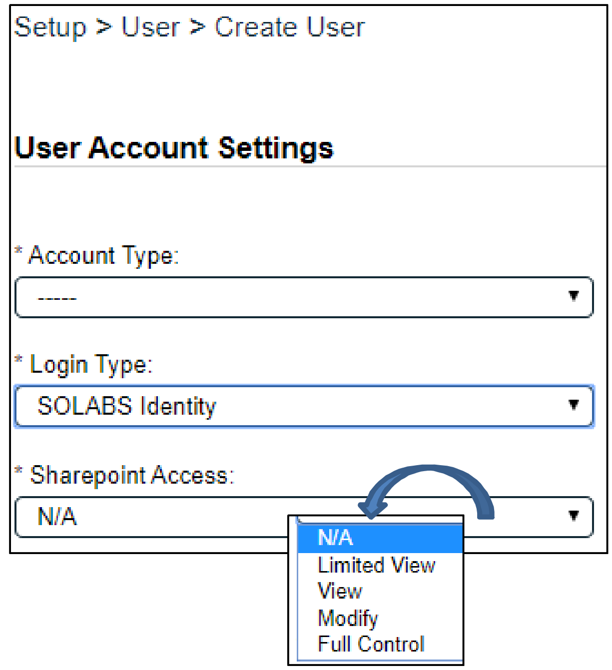


If the **Login Type** is **SOLABS Identity**, or a Login Type related to a Single Sign-On feature such **AzureAD** or **OneLogin**, the Email Address field in the User Account Details section will become mandatory. The System Administrator will not select a Password in this case because new users will be sent an email with instructions to set up their own Password.

Starting with SOLABS QM10 Version 10.8, System Administrators can grant access to the SharePoint Portal for users with a Login Type of SOLABS Identity, AzureAD or OneLogin.

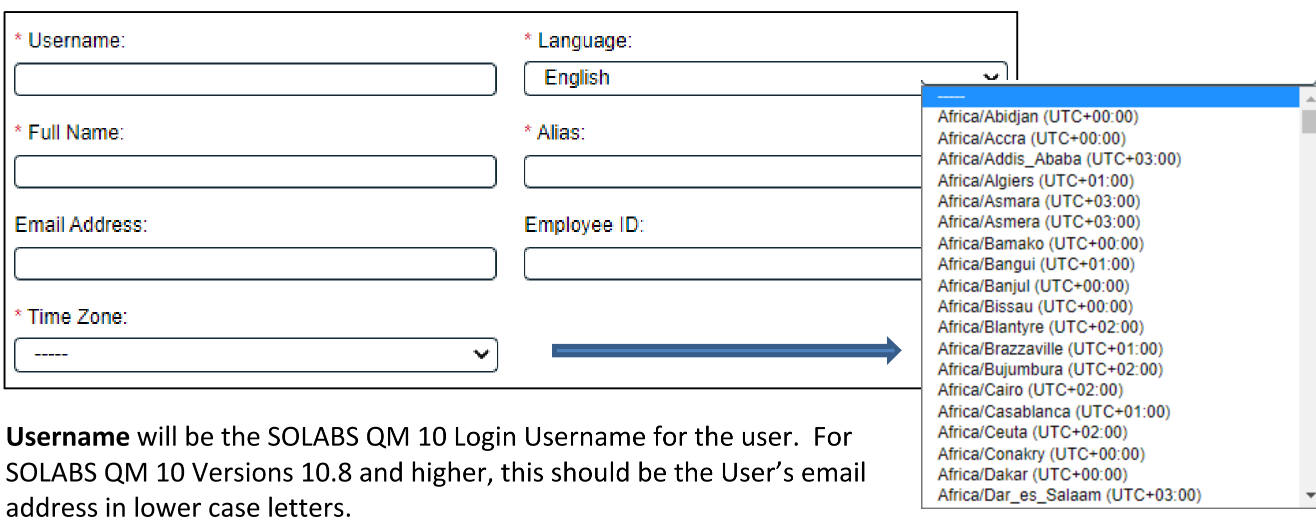
There are four levels of **SharePoint Access** that can be granted:

- **Limited View** access allows users to view and execute reports in the Production Library.
- **View** access allows users to view and execute reports in the Validation Library and the Production Library.
- **Modify** access allows users to view, add, update and delete list items and documents in the Validation Library and the Production Library.
- **Full Control** access allows users full control access for administration of reports in the Validation Library and the Production Library.



For Database instances, such as Sandboxes or Validation Environments, this is grayed out if those environments are not set up to provide access to Reports.

User Account Details



Username will be the SOLABS QM 10 Login Username for the user. For SOLABS QM 10 Versions 10.8 and higher, this should be the User's email address in lower case letters.

Language will default to English. There will be other options only if supported for the client.

Full Name is the First Name and Last Name for the user, with a space in between (John Smith).

Alias will be auto-populated with the initials of the First/Last Name, but can be edited if needed. This field will need to be edited if there is already a user with the same initials. In that case a middle initial could be added or a number could be added as a suffix. This need will not be apparent until the Submit step, at which point an error will identify the need to update that field because a user with the same Alias already exists.

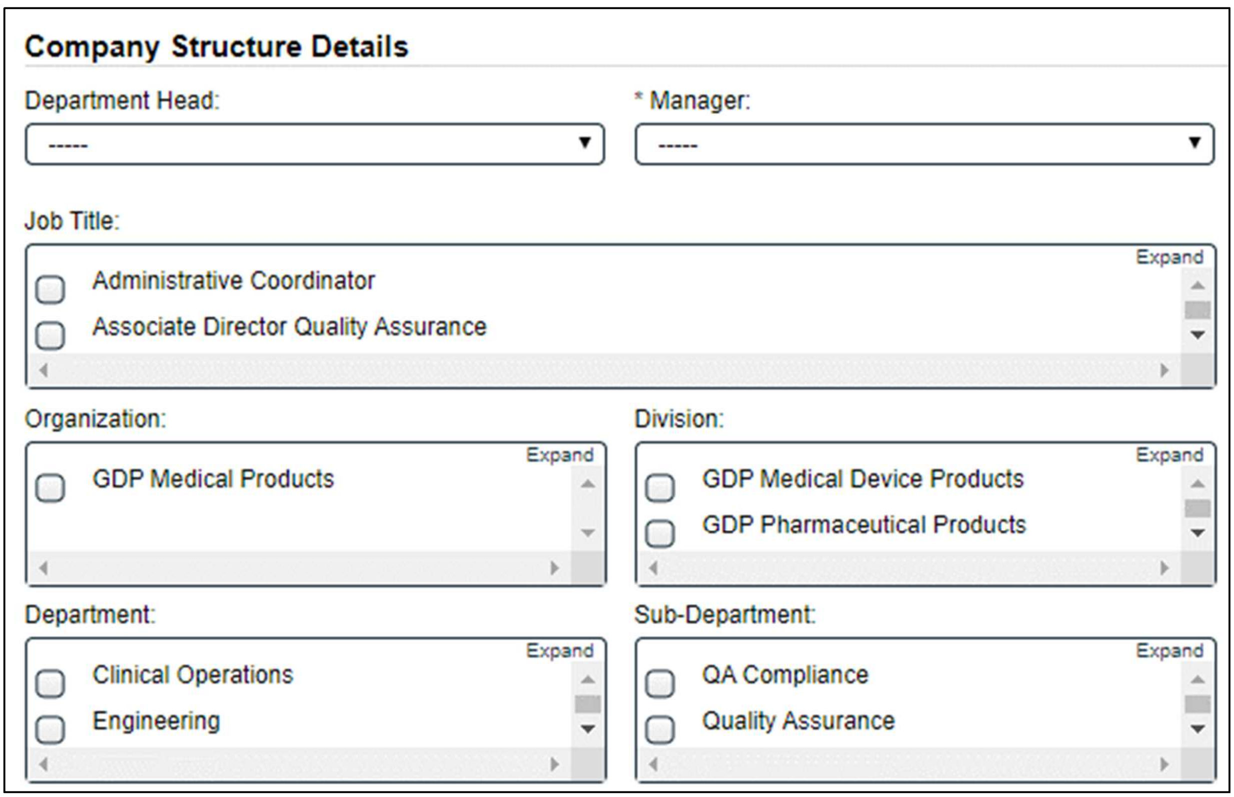
Email Address is necessary if the user will need to get any SOLABS QM Notifications for training assignments, document review/approval tasks, process tasks, etc. This field is not mandatory for Sandbox and Validation instances but is mandatory for Production instances.

Employee ID is optional but can be filled in or populated from an HR interface.

Time Zone is a mandatory field. It is a single-item selection list of worldwide time zones. If you start typing part of the name, you will get to that part of the list.

Company Structure Details

<u>IMPORTANT NOTE</u>: In order for information in this section to be available for selection, it must already have been created by the SOLABS System Administrator in SOLABS QM. If it is created afterwards, you will need to come back later and Modify User in order to add that information. See Page 10 for Role Management.



Department Head is a single-item selection field that includes all active SOLABS QM Users. Selecting the Department Head for a SOLABS QM User can be helpful when running queries and reports.

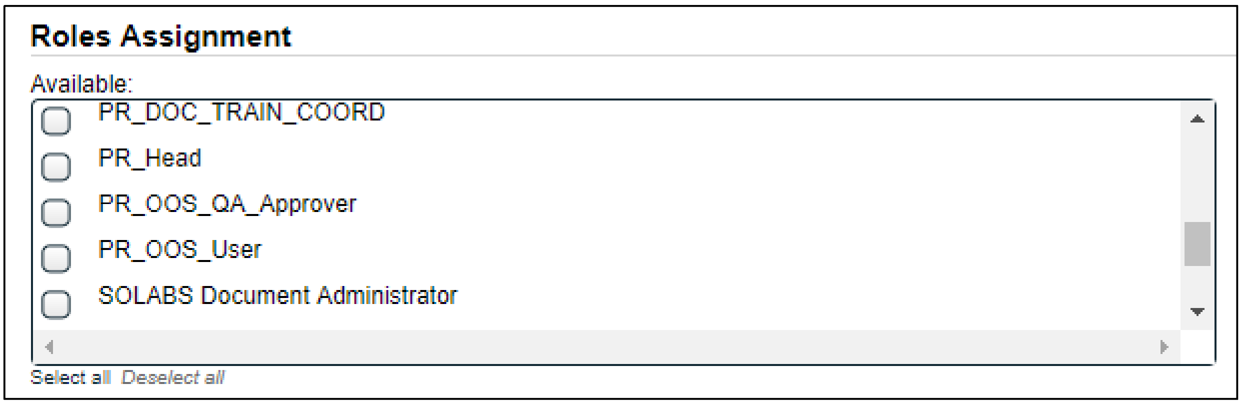
Manager is also a single-item selection field that includes all active SOLABS QM Users. Selecting a manager for a SOLABS QM User is mandatory in order to support various Notifications, Queries/Reports and Training Second Confirmations. An option of “myself” is available if for some reason there is no manager.

Job Title is a multi-item selection field that includes **all active Function (FCT_) Roles**. Selecting one or more Function Roles for a SOLABS QM User is important if you plan to assign training by Job Profile, if the user will be involved in the Review/Approval of documentation or if the user will be required to act on a process task.

Function Roles can also be used to set document privileges. As Job Title selections are made, those Function Roles will appear in the **Assigned** section at the bottom of the screen.

Organization, **Division**, **Department** and **Sub-Department** are multi-item selection fields that include all active Security (SEC_) Roles. Selecting one or more Security Roles for a SOLABS QM User can be helpful for setting document privileges and also for queries and reports. As these selections are made, those Security Roles will also appear in the **Assigned** section at the bottom of the screen.

Roles Assignment



The **Available** Roles is a multi-item selection field that includes the Process (PR_) Roles that come with any deployed Process APPs and the four System (SYS_) Roles that come with the Core Software – SOLABS Document Administrator, SOLABS Help Desk, SOLABS System Administrator and SOLABS Training Administrator. These Roles are not created by the SOLABS System Administrator; they are available with the software and can be assigned to Users as applicable.

- The Process Roles must be assigned to users who will need to Act On the related Process Tasks (such as QA Approver for an CAPA).
- The System Roles must be assigned to users who will be performing SOLABS QM system administration activities for User Management, Configuration, Document Management or Training Management.

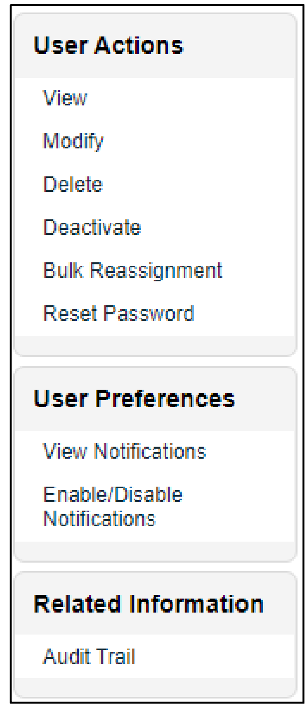
After the appropriate selections are made for a user, the **+ADD** button must be clicked in order to manually add these to the **Assigned** section at the bottom of the screen.

Submit and Confirm

When all information is complete on the Create User screen, click **Submit** and then check your work. Click **Confirm** to Save your settings.

Once the User is created, the **User Account View** page is loaded and will display all the entered information. This information will be visible to the User when they click on **SETUP** from the Top Menu, as described on Page 3 of this document.

Modify a User



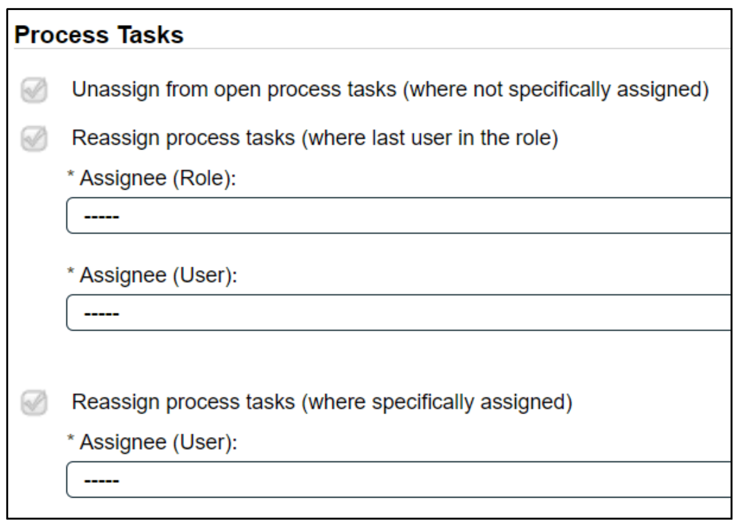
To modify a User, click **User Actions > Modify** to the right, to access the **Setup > User > Modify** screen. User account information can be modified at any time by the SOLABS System Administrator.

Modify the setting as required, **Submit** and then **Confirm** after checking your work.

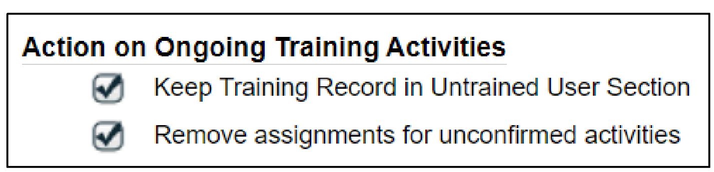
Deleting or Deactivating a User

You can **Delete** a user, only if there has never been any activity on the account, including a user Login. If you try to delete an account that has had any activity, you will get the following message:

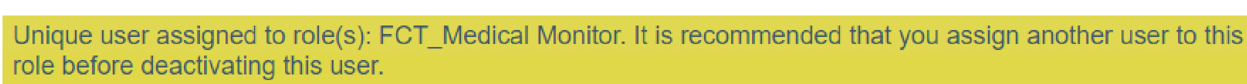
You can **Deactivate** a user, either permanently if they have left the company or temporarily if they are on leave. When this action is taken, you will be prompted to enter **Reassignment Actions** for open **Process Tasks**, active **Tasks and Secondary Tasks**, **Document Workflow Tasks**, **Trainer Assignments** and **General System Configurations** (Department Head, Manager, Standard Attribute Default Value, System Attribute Default Value, Delegate). For each of these, you will need to enter another User and/or Role as prompted, even if there are actually no outstanding tasks. Grayed out checkmarks mean that selecting a value in the related field is mandatory.



You will also see a section to take **Action on Ongoing Training Activities**. This allows you to remove any training assignments that are no longer applicable. These are selected by default but usually it is best to remove the checkmarks.



Finally, you will get a warning if the person you are attempting to Deactivate is the only person in a particular Function Role. This is just an alert so that you can assign that role to another user if needed.



Bulk Reassignment of Open Tasks for a User

If you need to make the above **Reassignment Actions** for an active user – for example if they change jobs – you would use the **Bulk Reassignment** option.   It will bring up the same reassignment fields as described above for the deactivation of a user.

Other User Management Actions

The **Reset Password** option is new with version 10.8 in Database instances only. Passwords for Production instances are managed through the Password Management Portal. Users can be unlocked by a System Administrator if they locked their account with too many login attempts.

The **User Preferences** options of **View Notifications** and **Enable/Disable Notifications** are available to SOLABS System Administrators as well as individual users.

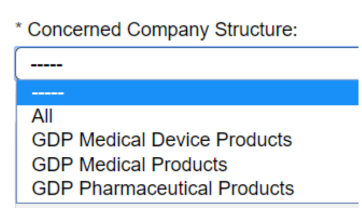
The **Related Information** section includes an **Audit Trail** option for the SOLABS System Administrator to view all historical actions on a user account.

Role Management

There are four types of **Roles** available in **SOLABS QM.**   Users can be assigned one or more as required.
Role Management actions require assignment of the System Role **SOLABS System Administrator**.

<table>
<tr><th>Role Type</th><th>Description</th></tr>
<tr><td>Security Role</td><td>Assigned to defines what part(s) of the organization a user belongs to:
• Department,
• Sub-Department
• Division
• Organization

Security Roles can be used to set Document privileges and are helpful in running Reports, such as Departmental Training Compliance.

The Organization Security Roles will be displayed as values in the Concerned Company Structure field at Step 1 of a Document Control Process.   This allows you to have different Document Coordinators for different parts of the organization, and ensure the process goes to the correct one.


</td></tr>
<tr><td>Function Role</td><td>Assigned to define the User’s Job Title and/or other functions they perform.

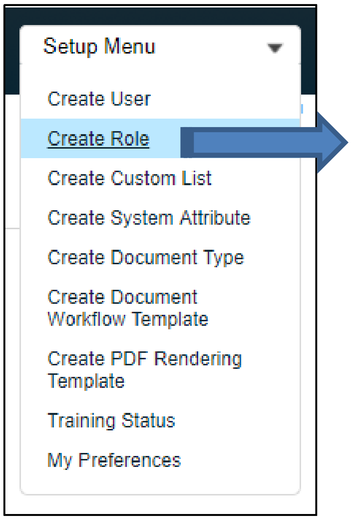
Function Roles are necessary as part of the electronic signature for Document Reviews/Approvals and Process Tasks.

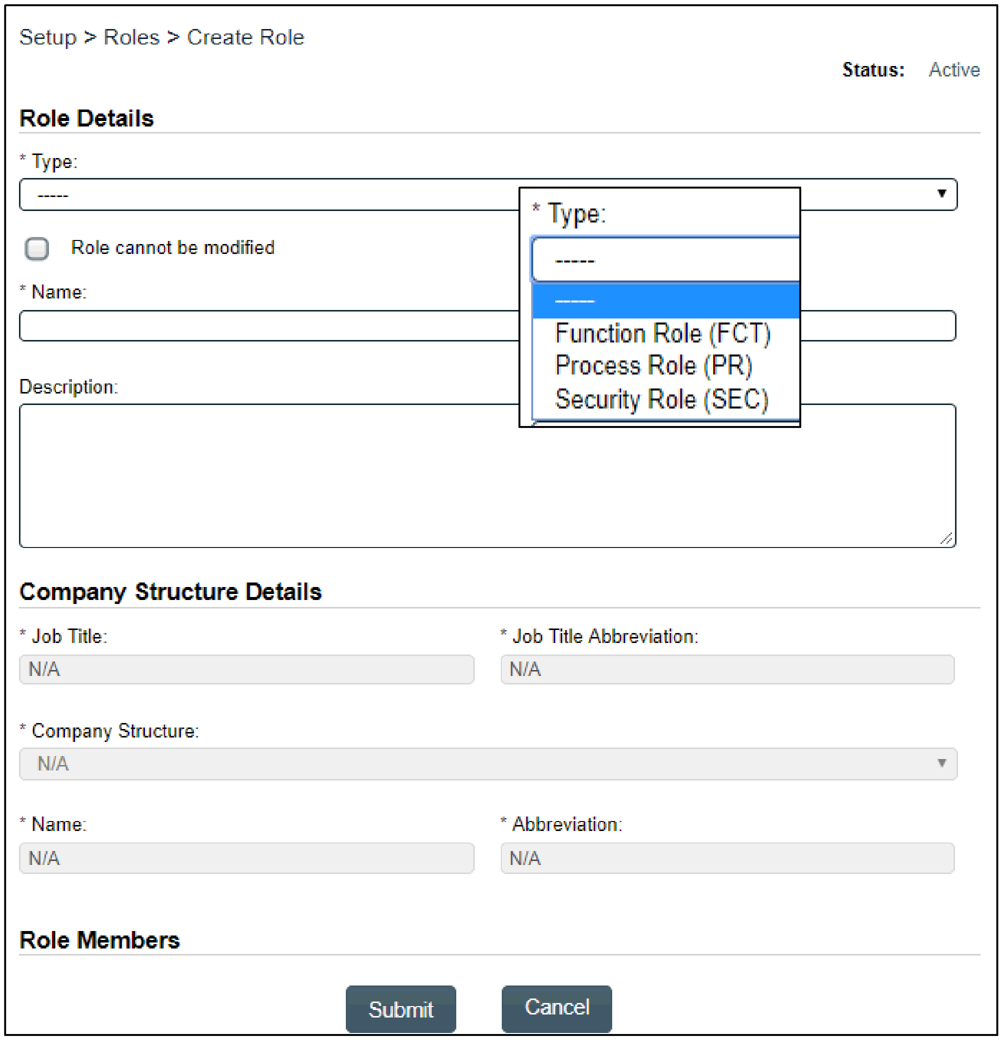
They can also be created for linking Training Activities that may not be unique to a particular Job Title – such as employee orientation training, departmental training or training related to a particular task that may be conducted by users in multiple Job Titles.</td></tr>
</table>

Process Role	Associated with **SOLABS QM Process APPs**, and assigned to define a User's responsibility in a given Process workflow.
System Role	Reserved for specific individuals involved in **SOLABS System Administration** activities, and assigned to provide related permissions.

Create a Role

From the Quick Access menu, click **Create Role**. The **Create Role** page is then loaded. Required fields are identified by an asterisks (*).





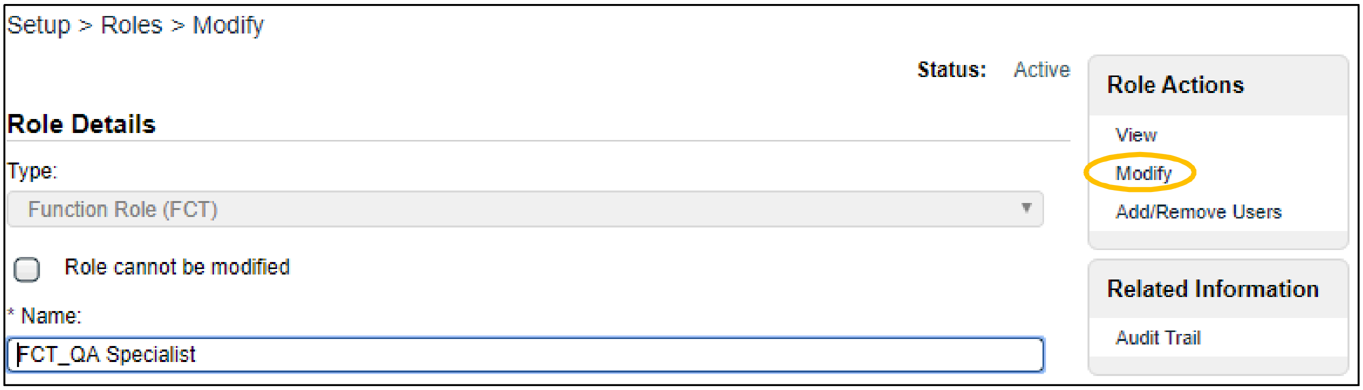
The mandatory **Type** field is a single-select drop-down list to choose the type of Role being created. Depending on the choice made, related fields in the Company Structure Details section will become enabled.

- For Function Roles, the mandatory **Name, Job Title** and **Job Title Abbreviation** fields will be enabled. The **Job Title** field will be auto-populated with the information entered in the **Name** field. The Prefix FCT_ will also be auto-populated in the Name field after moving to the next entry.
- For Security Roles, the mandatory **Name, Company Structure**, **Name** and **Abbreviation** fields will be enabled. The lower **Name** field will be auto-populated with the information entered in the upper **Name** field under Role Details. The prefix SEC_ will also be auto-populated in the upper **Name** field after moving to the next entry.

Selecting **Submit** will save the Role and make it available to assign to Users (see above section on **User Management**). As the Role is assigned to Users, they will be listed under **Role Members**.

Modify a Role

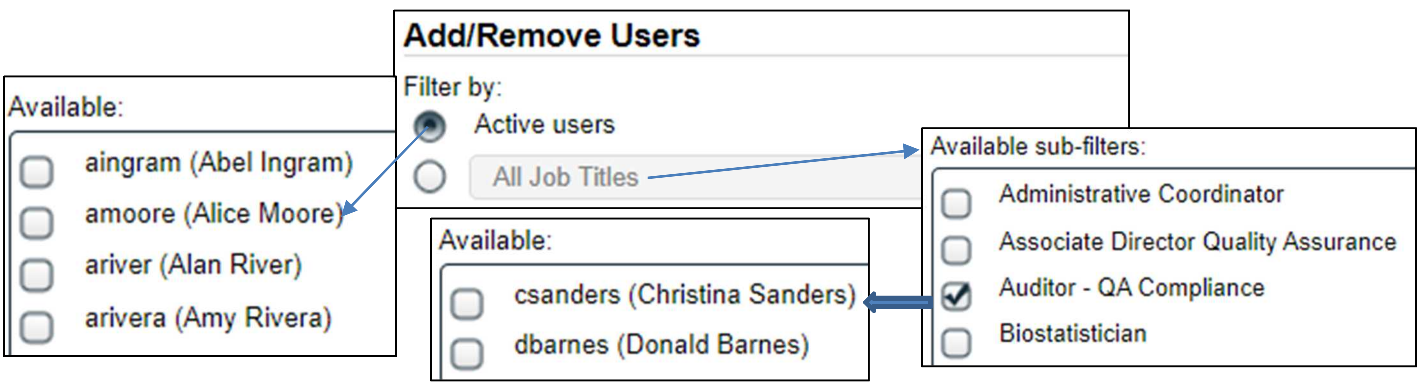
A role can be modified through the **Modify** action in the right-hand menu of the **Roles** page.



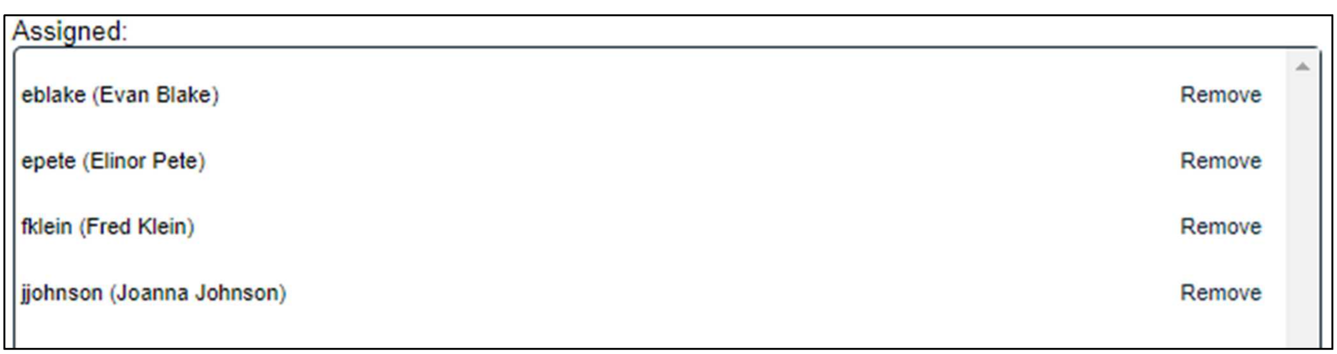
NOTE: Use caution in modifying the Role Name for any roles that may be associated with active document or process workflows. All roles identified with the prefix **PR** refer to **Process related roles** and should never be modified, in order to avoid an impact in the workflow of the related Processes. The **Role cannot be modified** box should be checked for all Process (PR) Roles in order to prevent inadvertent modification.

Starting with version 10.8, a Role can be modified to add or remove multiple users. Clicking on that option will bring up the Add/Remove Users screen.

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.



Custom List Management

From the **SETUP** Section, **Custom Lists** are available through the Administration tab of the left dashboard menu. Custom List Management actions require assignment of the System Role **SOLABS Document Administrator**.

Some Custom Lists are provided by default to support fields in the Core Software DOCUMENT management and TRAINING management sections. They are prefixed by “System_List_” and include the following:

System_List_Document_Publishing_Location

System_List_PDF_Header_Quick_Text

System_List_PDF_Watermark_Quick_Text

System_List_Reason_for_Change

System_List_Search_Queries

System_List_Sign-off_Meaning

System_List_Training_Activity_Categories

System_List_Training_Activity_Description

System_List_Training_Activity_MethodOfEvaluation

System_List_Training_Activity_MethodOfInstruction

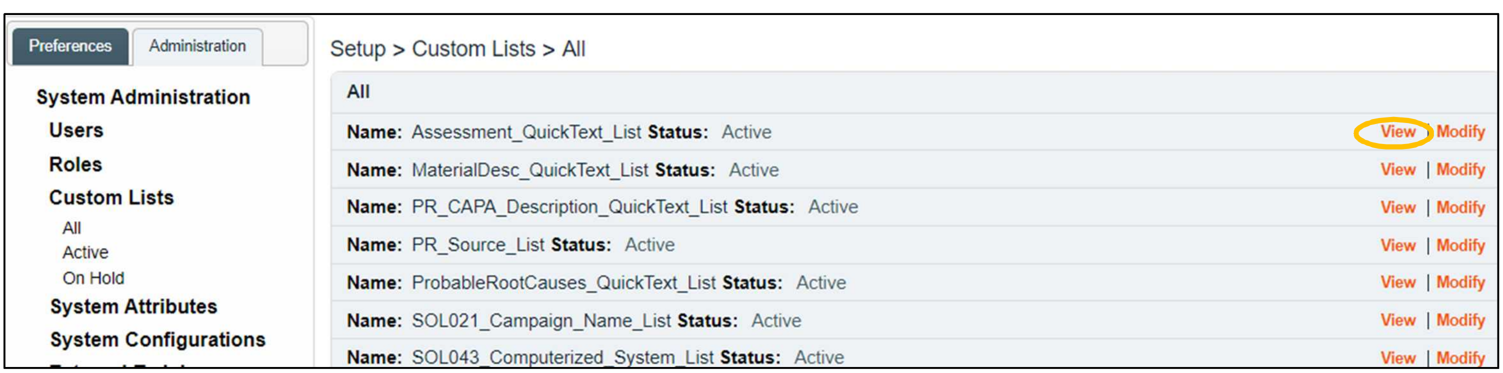
System_List_Training_Activity_Purpose

Some of the System Lists include default values but can be edited by the SOLABS System Administrator to reflect your company values and terminology. Others include no values, allowing values to be added by the SOLABS System Administrator.

Additional Custom Lists are provided by default with any deployed SOLABS Process APPs. They support fields related to those process workflows. They may include default values but can be edited by the SOLABS System Administrator to reflect your company terminology. These Custom Lists may have prefixes related to the Process, such as “CAPA_”, “AUD_”, “SOLDOC_”, “’CMR_”, etc. They may also include prefixes that start with “SOL_” and a number. Some may be shared across multiple processes. Consult the Process User, Functional & Design Specifications (PUFDS) document for your deployed Process Apps to confirm the names of the Custom Lists associated with each process step.

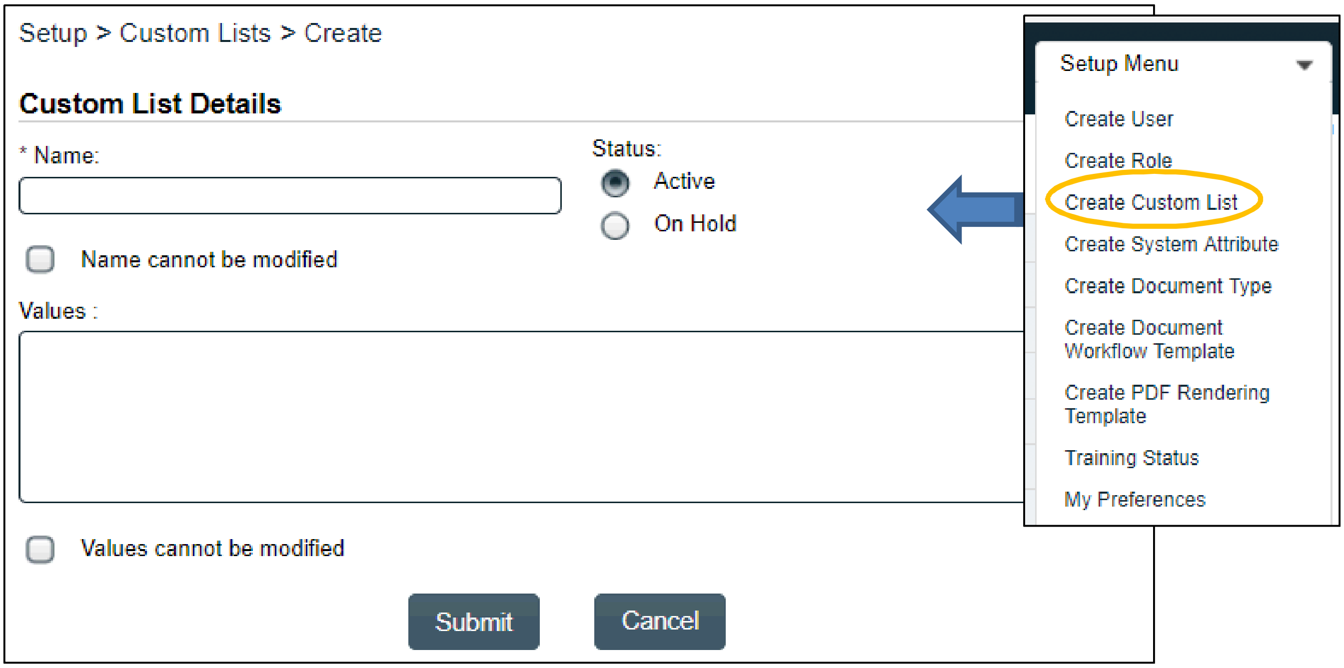
More Custom Lists can be created as needed by the SOLABS System Administrator, to support System Attribute fields for Document Types.

To view the list of all active Custom Lists, choose the <u>Active</u> option under Custom Lists from the left-hand SETUP Administration tab. View a specific list by using the **View** option to the right of the listing.



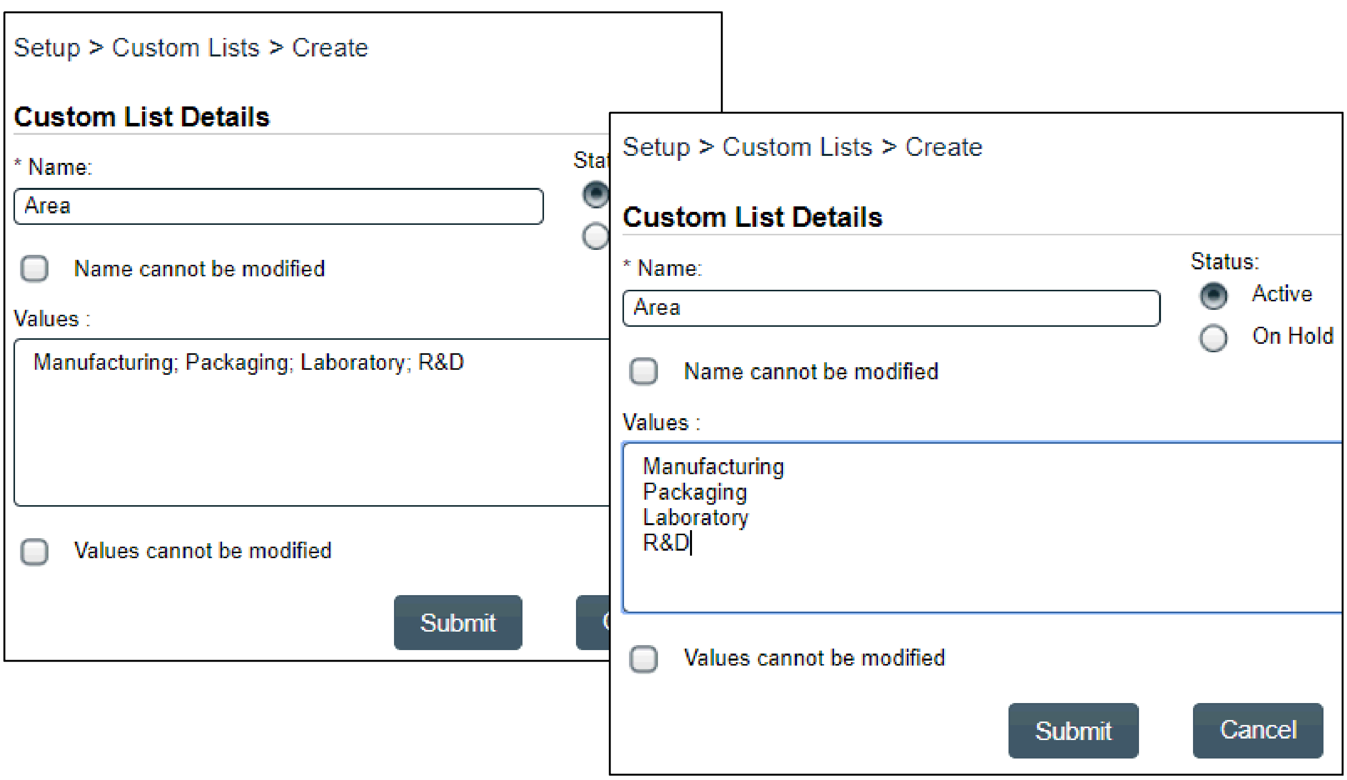
Create Custom List

From the **SETUP** Section, access the Quick Access **Setup Menu** at the top right of the screen and choose the **Create Custom List** option. The **Setup > Custom Lists > Create** screen will be displayed.



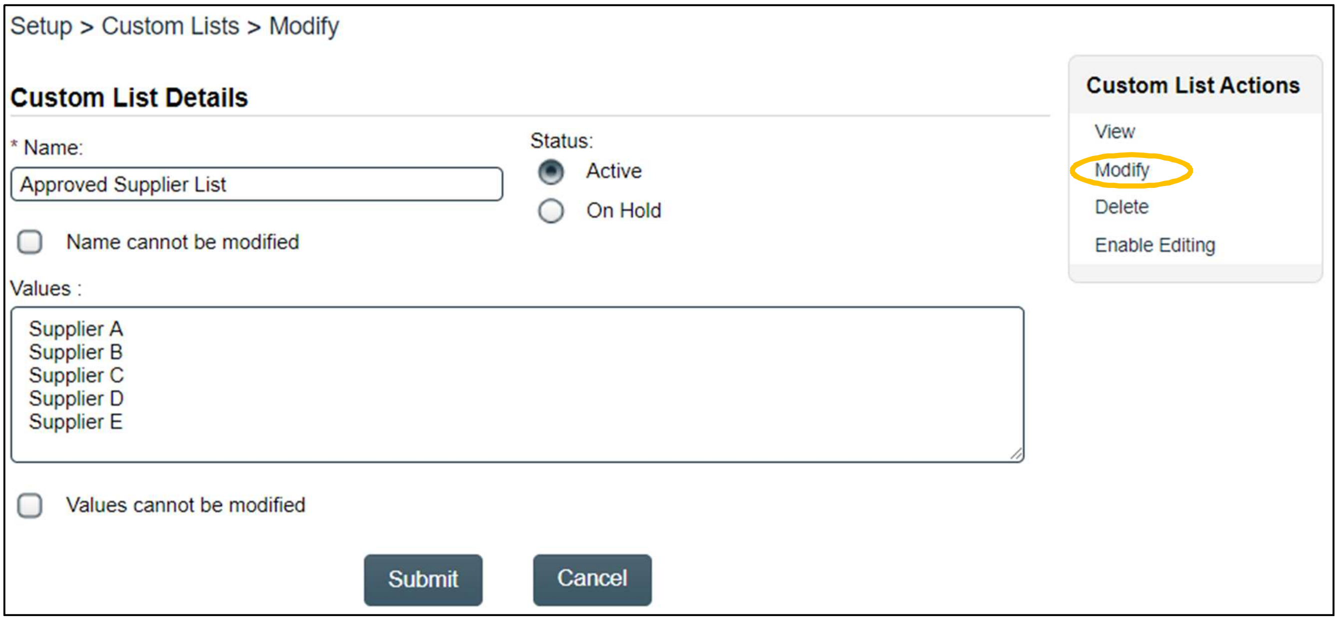
Enter a meaningful, intuitive **Name** for the custom list. Then enter the list of **Values**; separating multiple values with either semi-colons or by using the Enter key to list them underneath each other.

For example: Manufacturing, Packaging, Laboratory, R&D, then **Submit** & **Confirm** to save the Custom List.



Modify a Custom List

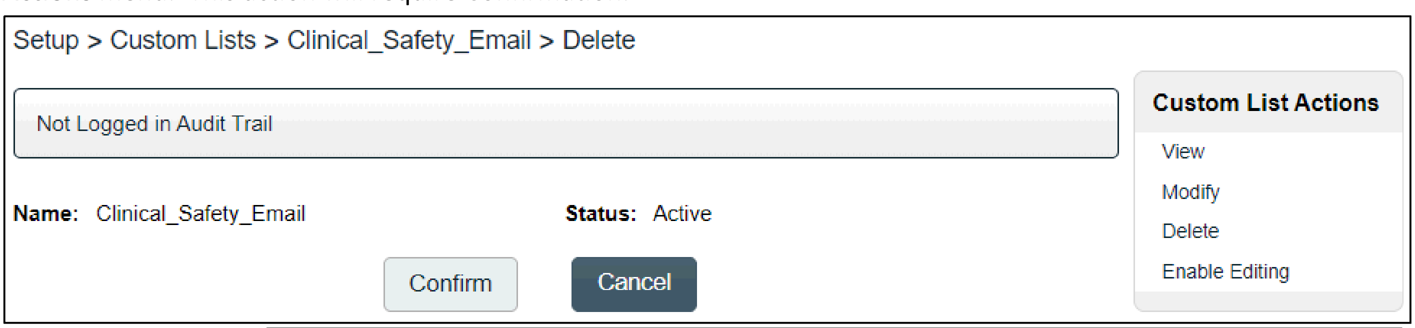
To Modify a **Custom List**, either choose the **Modify** option to the right of the listing on the list of Active Custom Lists, or choose the **View** option and then choose **Modify** from the right-hand **Custom List Actions** menu.



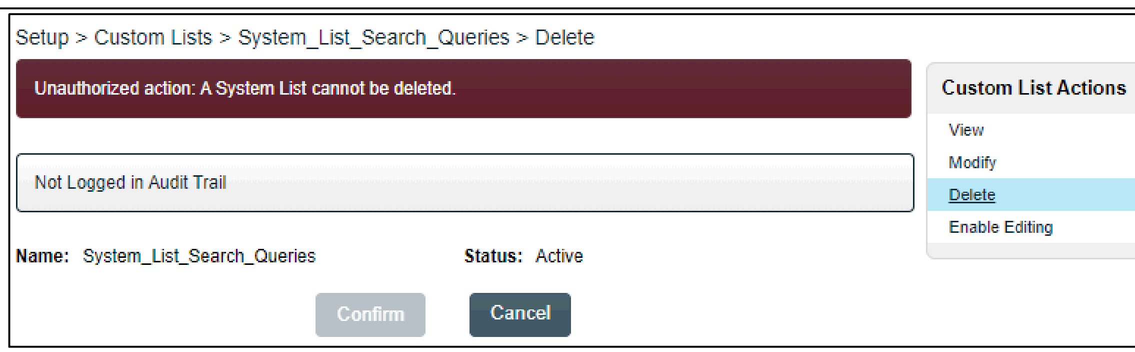
If **Name cannot be modified** or **Values cannot be modified** are checked, those fields can be enabled for editing by clicking on the **Enable Editing** option and then Confirming that choice. Use caution as the decision not to allow modification may be related to the use of that Custom List in an active process.

Delete a Custom List

User-created **Custom Lists** can be deleted by clicking the **Delete** option from the right-hand **Custom List Actions** menu. This action will require Confirmation.



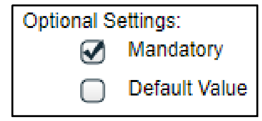
NOTE: system Lists **cannot** be deleted.



Managing System Attributes

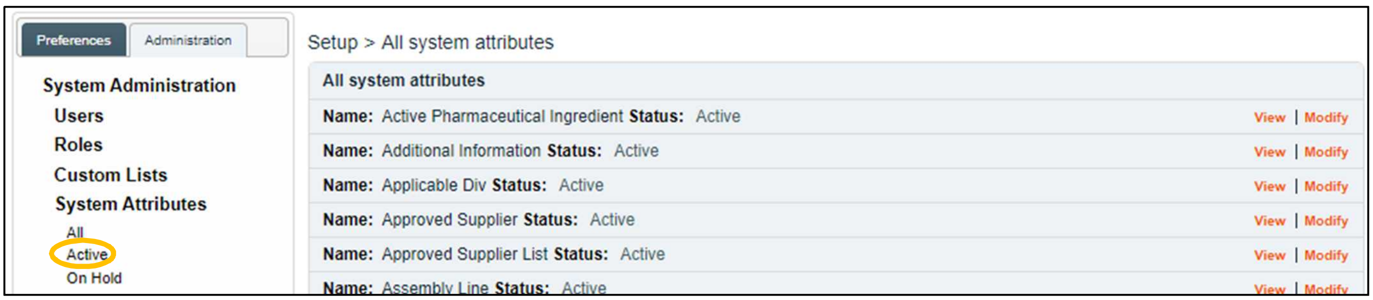
From the **SETUP** Section, **System Attributes** are available through the Administration tab of the left dashboard menu. System Attribute Management actions require assignment of the System Role **SOLABS Document Administrator**.

Some System Attributes are provided by default to support fields in the DOCUMENT, TRAINING or PROCESS Sections of the software. These System Attributes can be modified only to change the Optional Settings related to whether the field is **Mandatory** and/or has a **Default Value**.



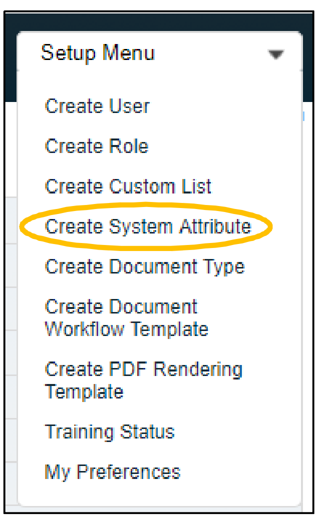
Additional System Attributes can be created as needed for creating different Document Types.

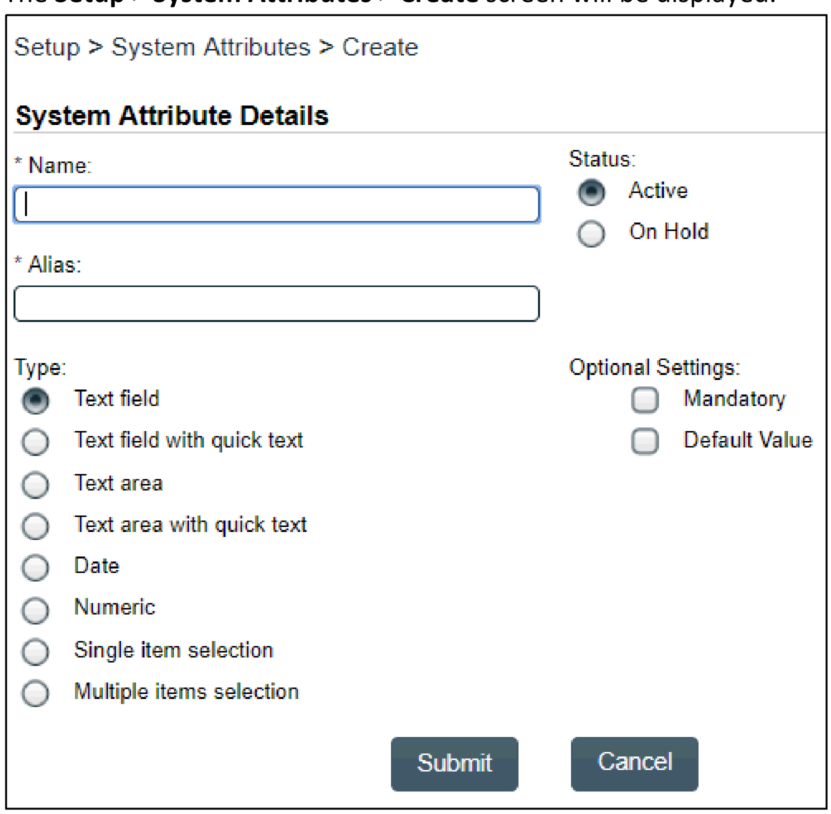
To view the list of all active System Attributes, choose the <u>Active</u> option under System Attributes from the left-hand SETUP Administration tab. View a specific list by using the **View** option to the right of the listing.



Create a System Attribute

From the **SETUP** Section, access the Quick Access **Setup Menu** at the top right of the screen and choose the **Create System Attribute** option. The **Setup > System Attributes > Create** screen will be displayed.

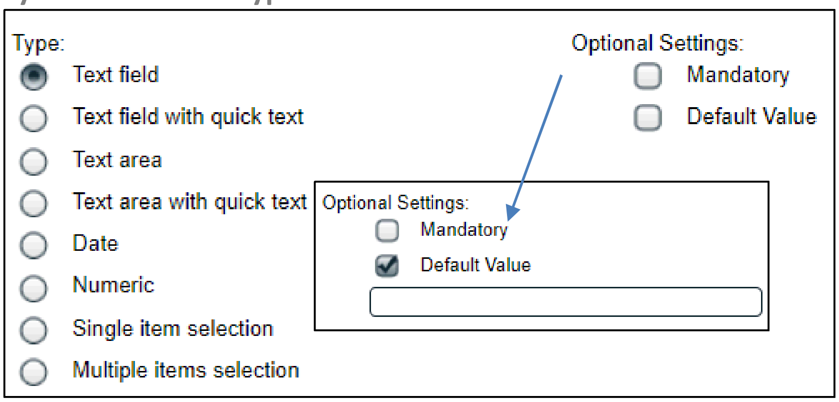




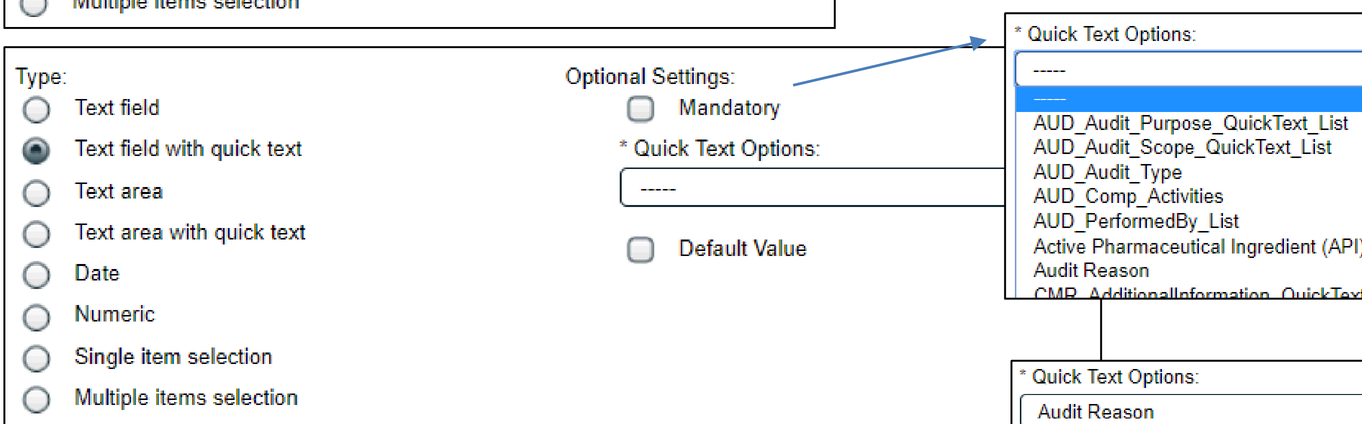
Enter a meaningful, intuitive **Name** for the System Attribute. The **Alias** will be auto-populated with the same information, if it is within the allowable number of characters (12). Otherwise, you will need to enter a shortened version of the Name into the Alias field.

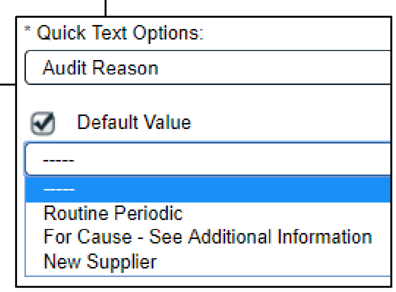
You then need to select the Attribute **Type** from the available options. Depending on the **Type** you select, different options are then presented to you to further define the field. The options for each choice are displayed on the next page.

System Attribute Types

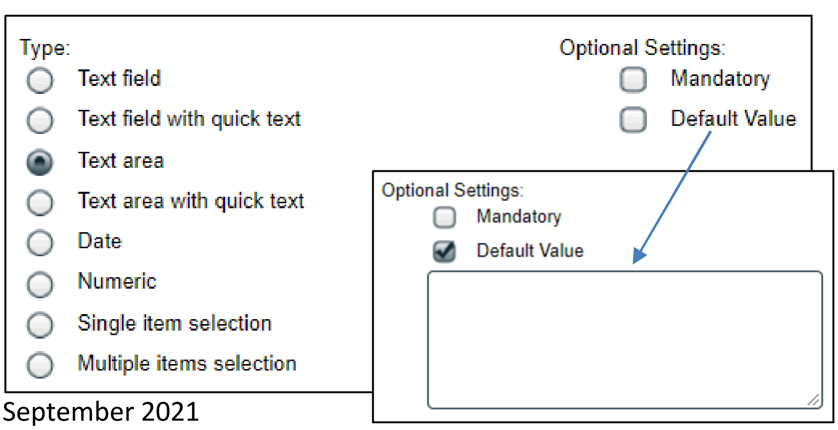


An Attribute Type of **Text field** can be defined as **Mandatory** (asterisks * will identify the field as mandatory to the user entering information in it) or not. It can also be set to have a **Default Value**. Selecting Default Value will bring up a field to enter that Value.



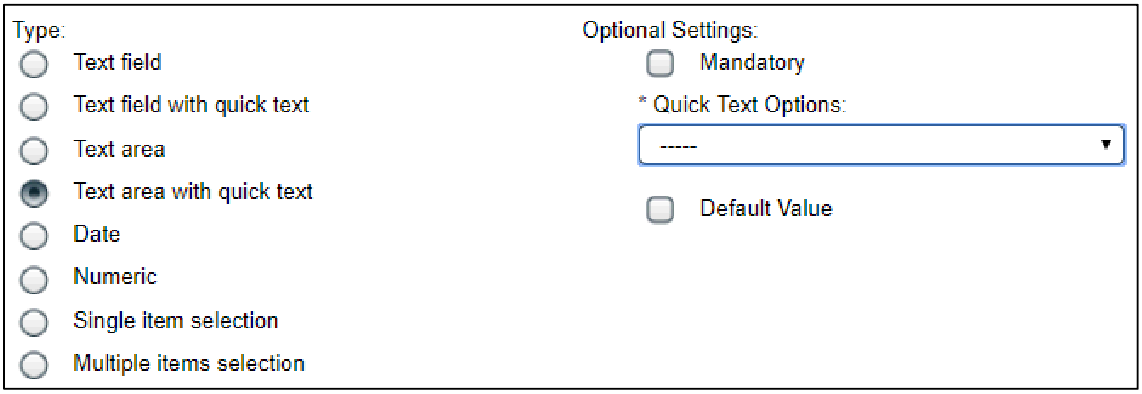


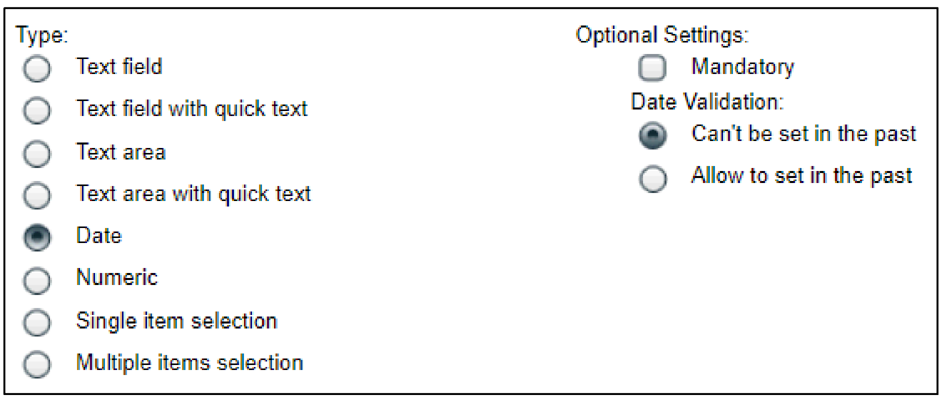
An Attribute Type of **Text field with quick text** can be defined as Mandatory or not. The mandatory **Quick Text Options** field is a single-select drop-down list that will bring up the **Active Custom Lists**. If another list is needed, simply create a new Custom List (see previous section), which will then be available to choose. Selecting **Default Value** will bring up a single-select drop-down list with the Values related to the chosen Custom List.



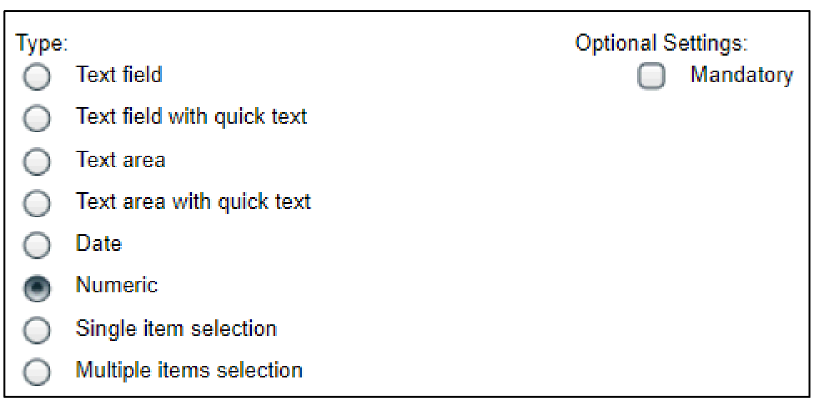
An Attribute Type of **Text area** is the same as a Text field (see above), except that there is room for more free-text characters, both for the user and for setting any Default Value.

An Attribute Type of **Text area with quick text** is the same as a Text field with quick text, except it would be used for Values that had more characters.

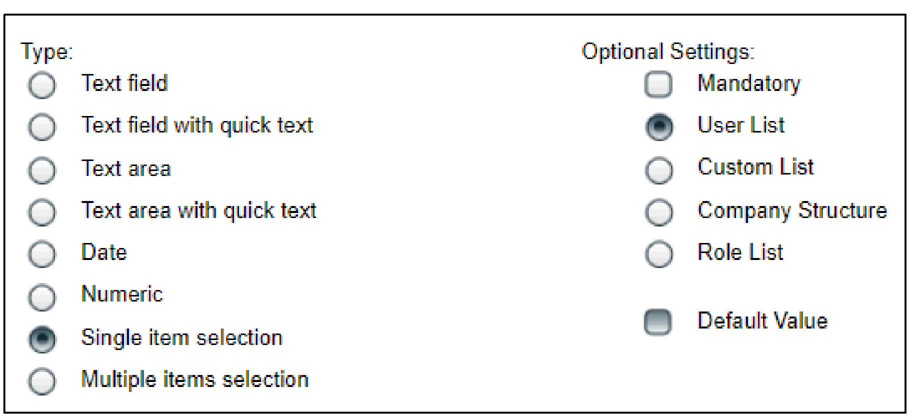




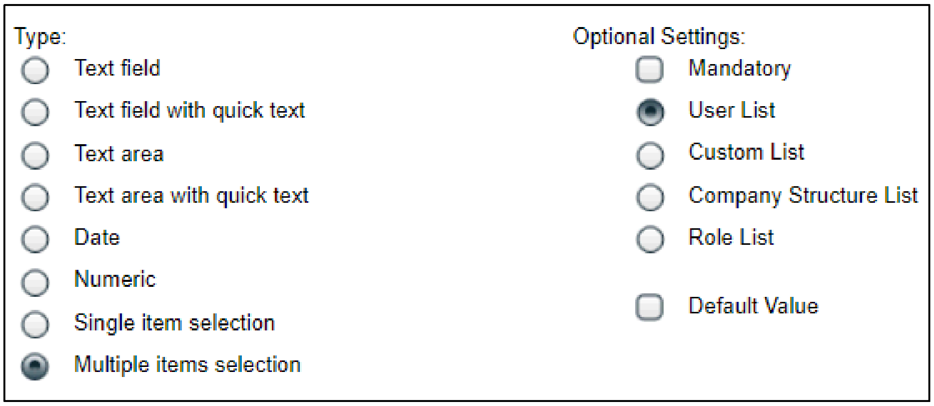
An Attribute Type of **Date** can be set as Mandatory or not and requires a choice of **Date Validation** of either **Can't be set in the past** or **Allow to set in the past**.



An Attribute Type of **Numeric** will accept numbers only and can simply be set as Mandatory or not.



An Attribute type of **Single item selection** is used to define the System Attribute field as a single-select drop-down list. It can be set as Mandatory or not. The selections can be **User List** (all active Users), **Custom List** (all active Custom Lists), **Company Structure** (all active lists for Organization, Division, Department, Sub-Department) or **Role List** (all active FCT and SEC Roles). Choosing to set a **Default Value** will bring up the list of Values for the selected list.



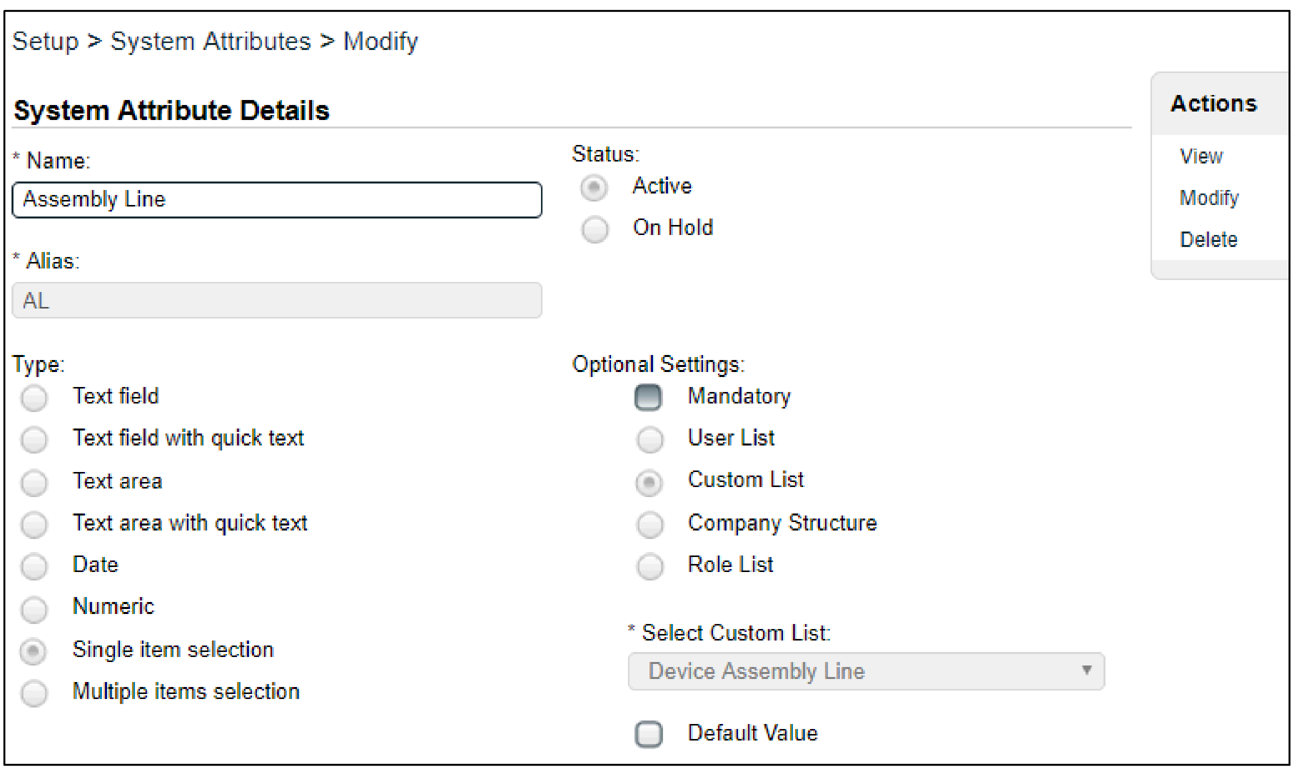
An Attribute type of **Multiple items selection** is used to define the System Attribute field as a multi-select list. The settings are the same as for the Single item selection field, but the user will be able to pick more than one value.

After making your System Attribute Type selections, click **Submit** and **Confirm** to save it to the Active System Attributes list. It will then be available to choose when creating a new Document Type or when modifying an existing Document Type.

Modify a System Attribute

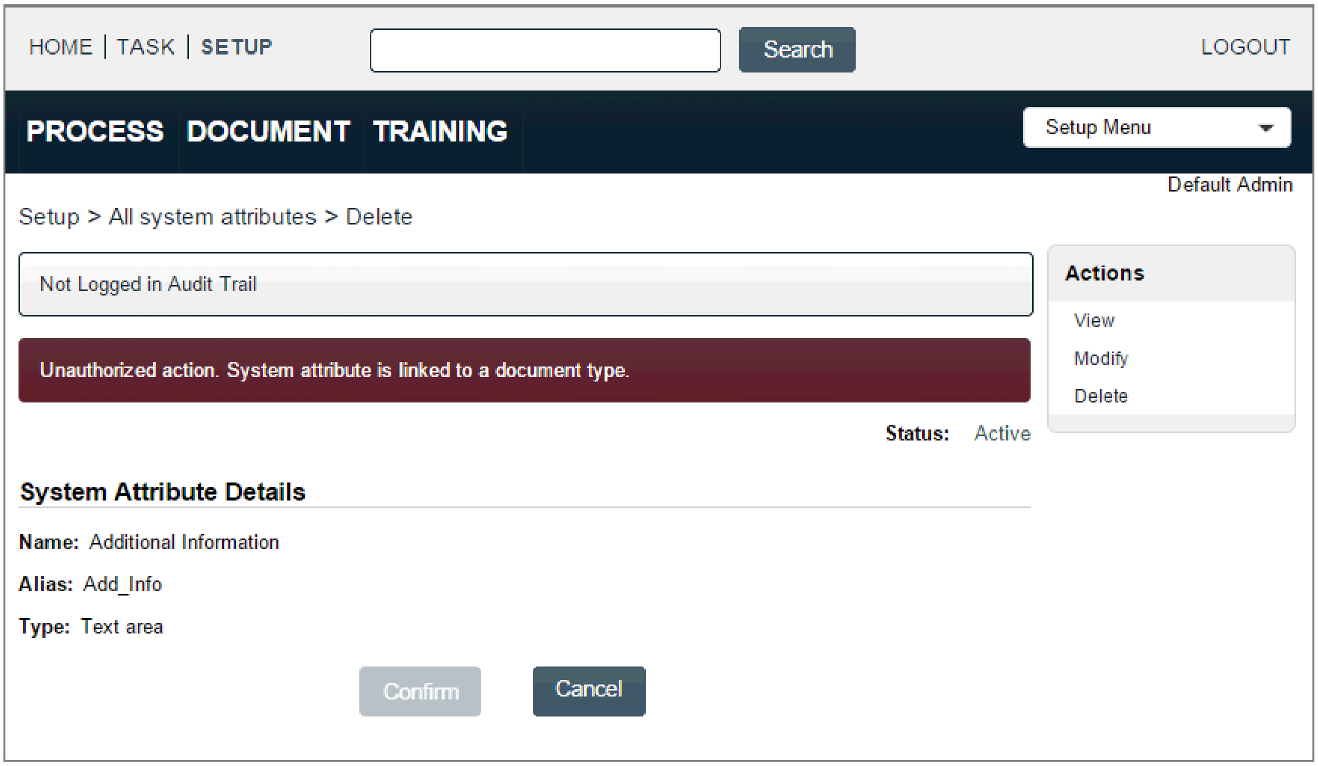
To Modify a **System Attribute**, either choose the **Modify** option to the right of the listing on the list of Active System Attributes, or choose the **View** option and then choose **Modify** from the right-hand **Actions** menu.

Only certain parameters of a **System Attribute** can be modified, once the attribute is used in the system. In the example below, only the Name, a change to Mandatory or a selection of a Default Value can be modified; everything else is viewable but grayed out so cannot be changed.



Delete a System Attribute

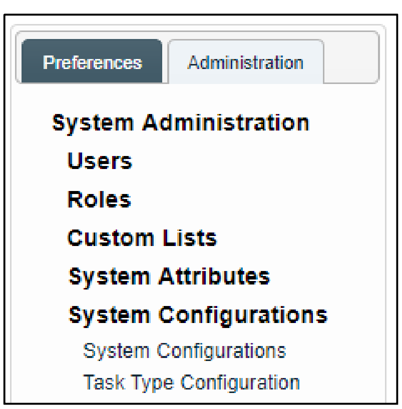
User-created **System Attributes** can be deleted by clicking the **Delete** option from the right-hand **Actions** menu. This action will require Confirmation. System Attributes already in use **cannot** be deleted. If the System Attribute is linked to a Document Type, deletion will not be able to be Confirmed – an **Unauthorized action** message will be displayed.



Managing System Configurations

From the **SETUP** Section, **System Configurations** are available through the Administration tab of the left dashboard menu. System Configuration Management actions require assignment of the System Role **SOLABS System Administrator**.

There are two administrative activities in this section: System Configurations and Task Type Configuration.

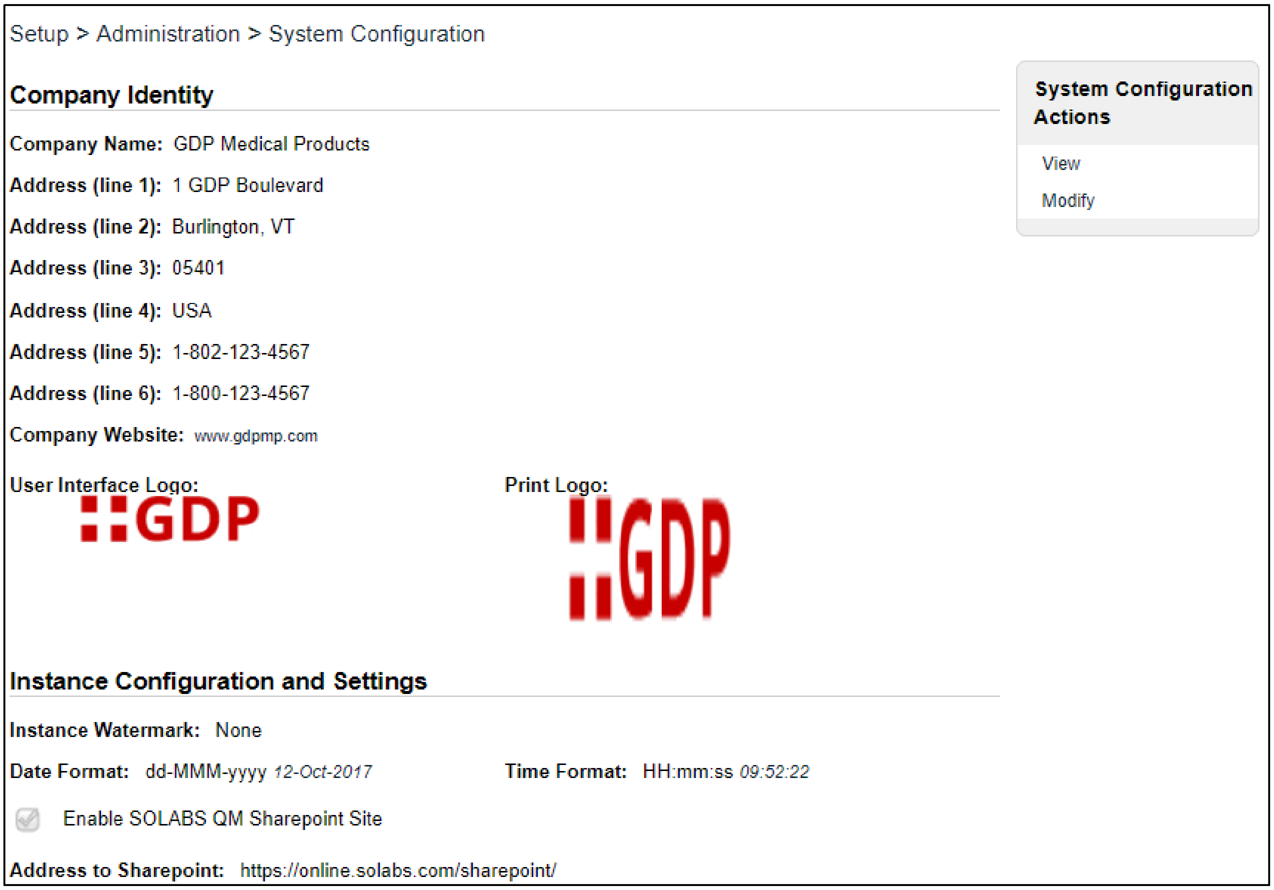


The **System Configurations** option is where company information and preferences are set up. Some of these setting may be set up during installation of the software but can be edited when needed.

The **Task Type Configuration** option is where you can configure the Task Types that will be available to users who may create Tasks or Task Groups in the TASK section of SOLABS QM.

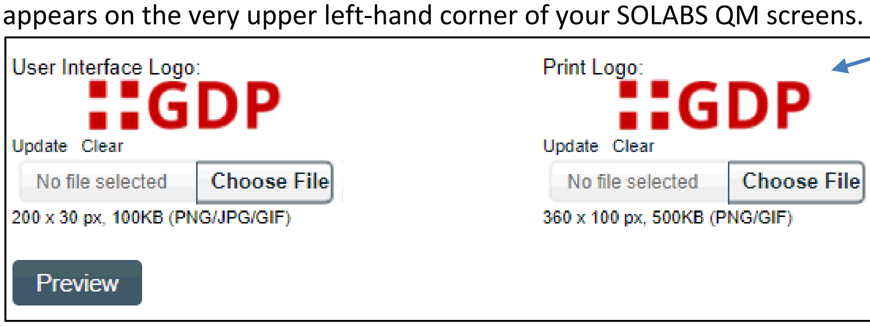
System Configurations

The System Configurations screen includes a **Company Identity** section and an **Instance Configuration and Settings** section. All of the information on this screen is optional but feeds other settings within the software. The information can be entered/edited by clicking on the Modify option under System Configurations Actions on the right-hand side of the screen. Example screen:

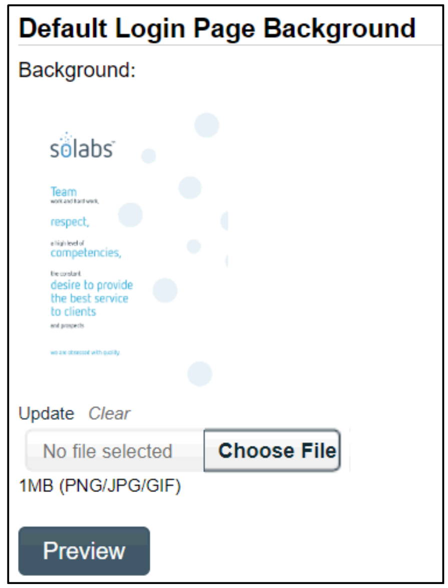


When setting up document PDF Rendering Templates there are choices to display The **Company Name**, **Address**, **Company Website** and a **Print Logo** on Document Cover Pages. If that is desired, then the information needs to be entered in the System Configurations section.

Logos can be uploaded from outside SOLABS QM. Information on file size for the logo is displayed in Modify mode. There is an option to Preview the results prior to Submitting and Confirming. The **User Interface Logo** appears on the very upper left-hand corner of your SOLABS QM screens. The **Print Logo** appears on documents.

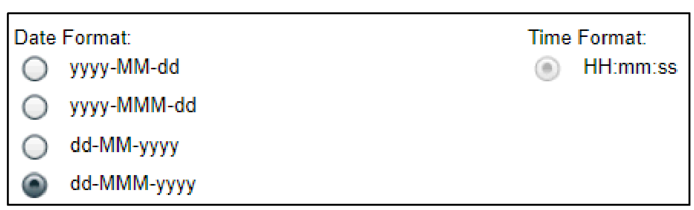


An image can be uploaded as a company-specific **Default Login Page Background**, to replace the SOLABS Default Login Page Background. The file type and size requirements are displayed when the "Update" option is chosen.

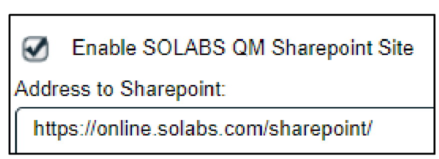


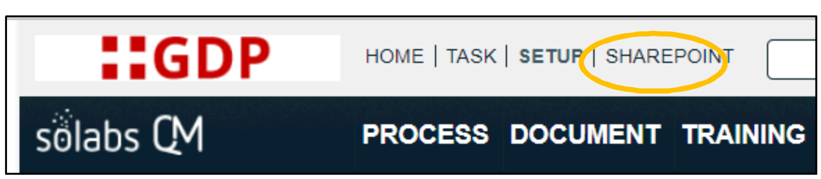
The **Instance Watermark** is helpful if you have more than one active instance of SOLABS QM, such as a Validation instance or a Test instance. For each active instance, this setting allows you to display watermarks on the screen to differentiate between the instances.

The selected **Date Format** and default **Time Format** settings apply across the entire SOLABS QM instance.



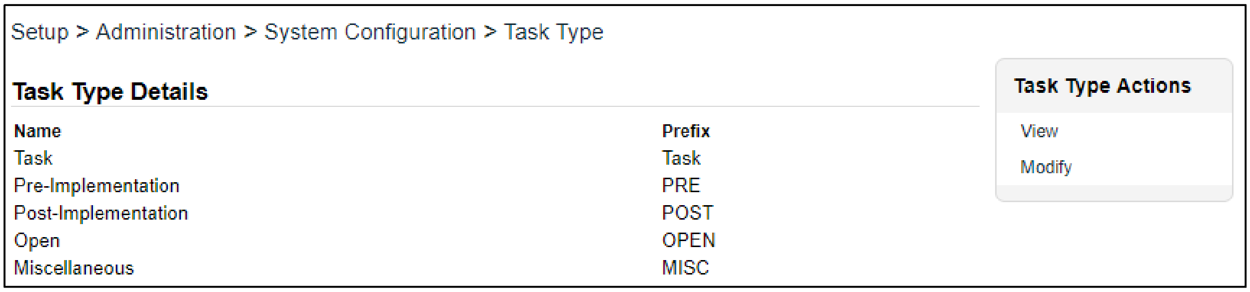
When the **Enable SOLABS QM SharePoint Site** box is checked, entering the applicable URL into the **Address to SharePoint** field will place the **SHAREPOINT** link at the top of the SOLABS QM screen and allow access to the SharePoint Portal for SOLABS QM Reports.





Task Type Configuration

When creating Tasks in SOLABS QM, initiators will choose a **Task Type**. Choose the **Modify** option in the Task Type Actions menu to **+ADD** additional Task Types or to edit existing Task **Name** and **Prefix** settings.

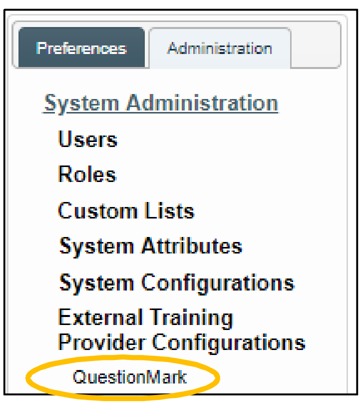


Name	Prefix
Task	Task
Pre-Implementation	PRE
Post-Implementation	POST
Open	OPEN
Miscellaneous	MISC

Managing External Training Provider Configurations

This is a Feature available starting with SOLABS QM 10 version 10.6.1 and part of the Training Section for all clients starting with version 10.9. When enabled, a **Questionmark OnDemand** instance is created for the client and then linked within their **SOLABS QM** instance. Assessments can then be authored within **Questionmark OnDemand** and are available to link to a **Training Activity** in **SOLABS QM 10**.

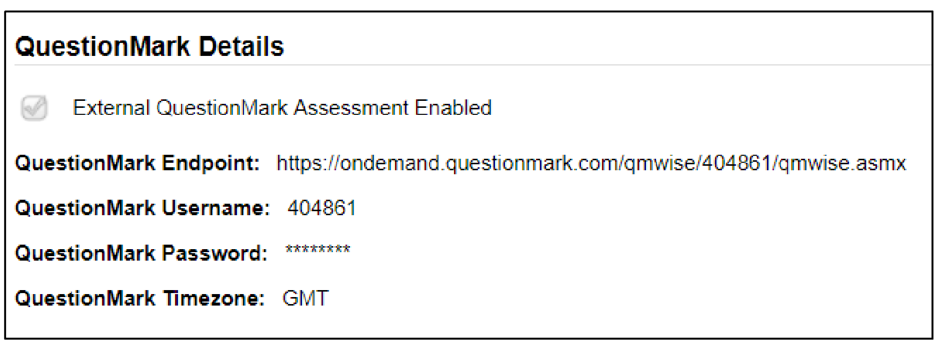
From the **SETUP** Section, **External Training Provider Configurations** settings are available through the Administration tab of the left dashboard menu.



Starting with SOLABS QM 10.6.1, the **SETUP/ System Administration** menu includes the option for **External Training Provider Configurations**.

For clients who have requested that this feature be enabled, **QuestionMark** will be listed in that section.

Clicking on the **QuestionMark** option in that section will bring up the **QuestionMark Details** screen, where the Questionmark OnDemand URL and administrative credentials will be displayed.



- The **QuestionMark Endpoint** field displays the URL to the Questionmark OnDemand instance created for your organization. This should **not** be modified or access to existing Assessments will be lost.
  - A separate but similar URL will be provided to Training Administrators for the authoring of Assessments.
  - The one for the example below would be https://ondemand.questionmark/404861/home

- The **QuestionMark Username** field displays the Username for your organization's Questionmark OnDemand instance. This is editable, to accommodate any future Questionmark Username change.
- The **QuestionMark Password** field includes the unique Questionmark OnDemand Password for the above QuestionMark Username. It will be provided to you by Solabs upon enabling this feature and is editable, to accommodate any future Questionmark Password change.

See the separate document **SOLABS QM 10 Questionmark OnDemand Interface** for more information on the actual use of this feature from within the TRAINING Section.