INTRODUCTORY SCENARIOS – GENERAL USERS

Any Administrator/Trainer Set-up is described in purple text)

Initiating a _____ Process – any/all Users

- Log into SOLABS QM10 with Username and Password provided to you
- Click on PROCESS from the top Main Menu
- Click on Start Process from the top right Quick Access Menu
- Start a _____ Process
    - Complete fields for Step 1 of the _____ Process, including creation of a Secondary Task
    - Submit and Confirm Step 1; note the _____ Number assigned

Searching for a _____ Process and Running a Summary Report
- Search for the above ____ Process by Process ID, using the Search Engine at the top of the screen
- Click on PROCESS from the top Main Menu and then the Navigation tab from the left-hand menu
- Search for all _____ Processes – any status – for the last 6 months
- View a _____ Process
- Click Summary Report from the right-hand menus on the _____ View screen
- Choose report options and click Generate Report

Acting on a Task *(requires an Administrator/Trainer to assign Tasks ahead of time; one to each person registered for the class; can create multiple Secondary Tasks or Ad Hoc Tasks and call them by the persons name "Task for Name1", "Task for Name2", etc. The Task Description can include directions for completing the Task.)*
- Log into SOLABS QM10 with Username and Password provided to you
- You will see a Task listed for you in the TASKS section of your Home Page.
- Click "View" next to this task, which has been assigned to you as part of a _____ Process. The instructions for completing this task are included on the Task View screen.

Document Review – Document Control Number _____ is out for Review to all Users in the class.
(requires an Administrator/Trainer to route a revised document – Rev 2.0 or higher to ensure a Compare file - for Review and include the Users in the class as the Reviewers)
- Log into SOLABS QM10 with Username and Password provided to you
- Locate the Review Task for ____ in DOCUMENTS Section of your Home Page and click on the *View* option to the right of that listing.
- At the View screen, locate the Compare File and open it – note you can see changes made by author
- Close the Compare File
- Click on Approve/Reject on the right-hand side of the View screen.
- Find your name and make your Review decision.

Document Approval – Document Control Number _____ is out for Approval to all Users – __ users are level 1 approvers in parallel, followed by __ users who will be level 2 Approvers *(requires an Administrator/Trainer to route a revised document – Rev 2.0 or higher to ensure a Compare file - for Approval and include the Users in the class as the Approvers – some at Order 1 and some at Order 2)*

- Log into SOLABS QM10 with Username and Password provided to you
- Locate the Approval Task for ____ in DOCUMENTS Section of your Home Page and click on the **View** option to the right of that listing. (Level 2 Approvers will not see the document until all Level 1 Approvers have approved it)
- At the View screen, locate the Compare File and open it – note you can see changes made by author
- Close the Compare File
- Click on Approve/Reject on the right-hand side of the View screen.
- You will be prompted to Open the document before you can approve it.
- Open the document – note watermark "For Approval"
- Close the file and click on Approve/Reject again
- Find your name and Approve. Choose Meaning "Approver".
- After all __ level 1 Approvers have approved the document, the __ Level 2 Approvers will log in and complete the Approval process

Searching for Documents

- Use the Search Engine box at the very top of the screen to search for Document Control Number _____.
- Use the Refine Results option on the left-hand side to search for other documents by status or type. Practice saving a Search Query.

Completing a Training Activity *(requires Administrator/Trainer to assign at least one Training Activity to the Users who will be in the class – it could be this class!)*

- Log into SOLABS QM10 with Username and Password provided to you
- Locate a pending training activity listed in the TRAINING Section of your Home Page.
- Click on Confirm next to a listed training activity and/or click on View next to the listed training activity and then choose the Record my Training option at the next screen.   If the activity is a document, you will be required to open it first.
- Enter a duration for the training and then Submit and Confirm.
- After completing at least one assigned training activity, click on Training Status from the Quick Access Menu at the top right of the Home Page.
- View your Training Status screen.