

SOLABS QM10: DOCUMENT Section: Modify Document Location

Introduction

Locations can be modified for documents in the following statuses:

- Authoring
- Approved, Not Effective
- Approved & Effective

This User Guide provides instructions on how to modify the location of a document.



Modify Document Location:

From the **Document > View** screen for the document you need to move, go to the **Document Actions** menu and choose the **Change Location** option.

Authoring
Pending Review
Pending Approval
Pending Retire
Approved, Not Effective
Approved & Effective
Retired

Document > View Travel Policy

Visibility: Visible

Document File

File:

Travel Policy.docx(10 KB)

Open
 Get Unmarked PDF
 Get Editable File Format

Change Summary:
<empty>

Standard Attributes

Document Type: Policy

Name: Travel Policy

Description: GDP Travel Policy

Unique ID: f81040a0-5476-4b96-9d09-713a18486ddd Internal Version: 1.0

Version: 1.0

Control Number: POL-FIN-001

Effective Date: 17-May-2017 Next Review Date: N/A

Document Life Cycle:

Life Cycle (in months): N/A

Planned Review Task Duration (in months): N/A

Location: /Root/Policies/Finance

Document Actions

- View
- Modify
- Modify Metadata Only
- Change Location
- Metadata to PDF
- Clear PDF
- Hide Document
- Get Link
- Email Link

Related Items

- Referred Document
- Reason for Change
- Modify Description
- Remove Links

Related Information

- Audit Trail

Privileges

- View

Click on the **Available Folders** option underneath the Location field to filter for the new location.

After clicking on the Filter button, and going back to the Location drop-down list, a list of all locations meeting the filter criteria will be displayed. Highlight the new location – it will then be displayed.

Submit and **Confirm** the change. The document will now be in the new folder location. The change will be captured in the Audit Trail for the document.