

Page 1 of 2

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.

Treevie	w
~	
Root	
D 🧊	Annual Product Reviews
Þ 🧊	Audit Reports
D 🧊	Clinical Development / Operations
Þ 🃁	Device Master Records
Þ 🃁	Finance Documents
D 🧊	Form
Þ 🃁	Human Resources
D 🧊	Information Technology
Þ 🧊	Legal
D 🧊	Master Production Records
4 🃁	Policies
⊿	Finance
	POL-FIN-001 / 1.0 (1.0) / Travel Policy - [Approved & Effective]

## **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		Document Actions
	Visibility: Visible	View
Document File		Modify
File:		Modify Metadata Only
Travel Policy.docx(10 KB)	•	Change Location
📩 Open 🛓 Get Unmarked PDF 🖉 Get Editable File Format		Metadata to PDF
		Clear PDF
Change Summary:	Hide Document	
	Get Link	
<empty></empty>		Email Link
Standard Attributes		
Document Type: Policy		Related Items
		Referred Document
Name: Travel Policy		Reason for Change
Description: GDP Travel Policy		Modify Description
Unique ID: f81040a0-5476-4b96-9d09-713a18486ddd Internal Version: 1.0	Remove Links	
Version: 1.0		
Control Number: POL-FIN-001		Related Information
Effective Date: 17-May-2017 Next Review Date: N/A		Audit Trail
Document Life Cycle: Life Cycle (in months): N/A		Privileges
Planned Review Task Duration (in months) : N/A	View	
Location: /Root/Policies/Finance		



Page 2 of 2

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

	Approved & Effective
Document > Main Page > Change Location	
	Visibility: Visible
Logged in Audit Trail	
~	
Standard Attributes	
Document Type: Policy	
Name: Travel Policy	
Unique ID: f81040a0-5476-4b96-9d09-713a18486ddd	
Version: 1.0	
Control Number: POL-FIN-001	
Location:	
/Root/Policies/Finance	•
Available Folders	

Folder Name Contains:	
Number of levels to display:	
Level 2	
Filter	

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.

Location: /Root/Finance Documents	Location: /Root/Finance Documents
/Root/Annual Product Reviews /Root/Audit Reports /Root/Clinical Development / Operations /Root/Device Master Records /Root/Finance Documents	Available Folders     Folder Name Contains:     Number of levels to display:
/Root/Form /Root/Human Resources /Root/Information Technology /Root/Legal /Root/Master Production Records /Root/Policies	Filter  Submit Cancel

**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.

Document > Travel Policy > Audit Trail	
Travel Policy	
Action Details: Document Location Changed Date: 15-Aug-2017 14:07:08 Username (Full Name): gdixson (Gretchen Dixson) Reason for Change: N/A	
Internal Version: 1.0 Action Details: Document Approved & Effective Date: 17-May-2017 16:52:15 Username (Full Name): bramsey (Bill Ramsey) Reason for Change: N/A	