

SOLABS QM10 Views | Detailed Descriptions

CONTENTS

In This Document	1
NOTE on Views	1
Settings that are Consistent for all Views	2
HOME - Home > Views - By Date.....	2
Logic for the Section Views.....	4
TASK > Views > My Tasks	4
PROCESS > Views > My Processes	5
DOCUMENT > Views > To Process	6
DOCUMENT > Views > My Documents.....	7
DOCUMENT > Views > Document Coordinator.....	8
TRAINING > Views > Outstanding.....	9
TRAINING > Views > Managers & Trainers	10
TRAINING > Views > Training Coordinators	11

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.

The listings reflect SOLABS QM10 Version 10.9. With that version, the default views were changed to be the broadest timeframe for each category.

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.

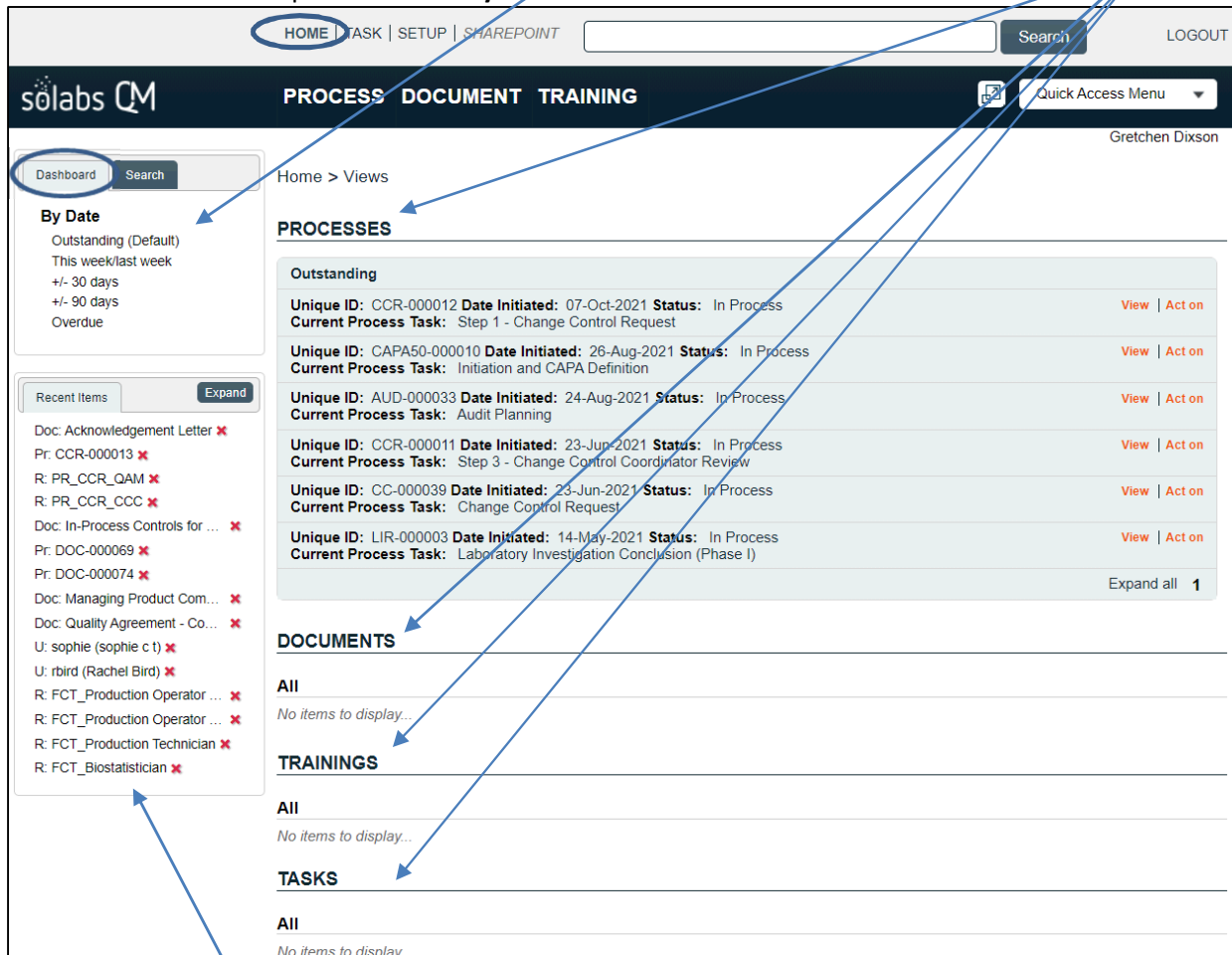
- Users may expect a **Document** to show up in a **View** and it does not, for example, because it is not yet **Effective**.
- Users may equally expect a **Training Activity** to show up in **Views** and it does not because, for example, a linked event that triggers the training may have not yet occurred.
- **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 solabs CM interface. At the top, there is a navigation bar with 'HOME | TASK | SETUP | SHAREPOINT' and a search box. Below this is a dark header with 'solabs CM' and 'PROCESS DOCUMENT TRAINING' tabs. The main content area is titled 'Home > Views' and is divided into four sections: PROCESSES, DOCUMENTS, TRAININGS, and TASKS. The PROCESSES section is expanded to show a list of 'Outstanding' items. The left sidebar contains a 'By Date' filter menu and a 'Recent Items' list. Blue arrows point from the text above to various elements in the screenshot.

By Date

- Outstanding (Default)
- This week/last week
- +/- 30 days
- +/- 90 days
- Overdue

Recent Items

- Doc: Acknowledgement Letter ✖
- Pr: CCR-000013 ✖
- R: PR_CCR_QAM ✖
- R: PR_CCR_CCC ✖
- Doc: In-Process Controls for ... ✖
- Pr: DOC-000069 ✖
- Pr: DOC-000074 ✖
- Doc: Managing Product Com... ✖
- Doc: Quality Agreement - Co... ✖
- U: sophie (sophie c t) ✖
- U: rbird (Rachel Bird) ✖
- R: FCT_Production Operator ... ✖
- R: FCT_Production Operator ... ✖
- R: FCT_Production Technician ✖
- R: FCT_Biostatistician ✖

PROCESSES

Outstanding

Unique ID	Date Initiated	Status	Current Process Task	View	Act on
CCR-000012	07-Oct-2021	In Process	Step 1 - Change Control Request	View	Act on
CAPA50-000010	26-Aug-2021	In Process	Initiation and CAPA Definition	View	Act on
AUD-000033	24-Aug-2021	In Process	Audit Planning	View	Act on
CCR-000011	23-Jun-2021	In Process	Step 3 - Change Control Coordinator Review	View	Act on
CC-000039	23-Jun-2021	In Process	Change Control Request	View	Act on
LIR-000003	14-May-2021	In Process	Laboratory Investigation Conclusion (Phase I)	View	Act on

DOCUMENTS

All

No items to display...

TRAININGS

All

No items to display...

TASKS

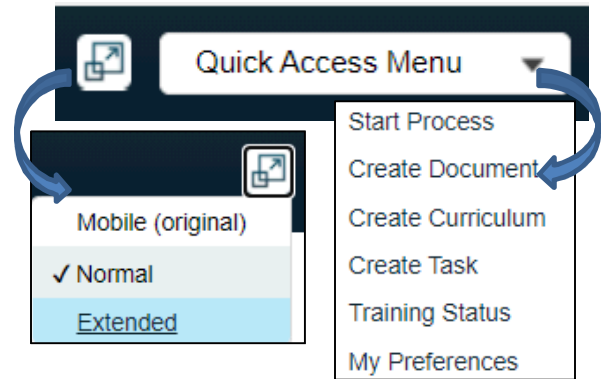
All

No items to display...

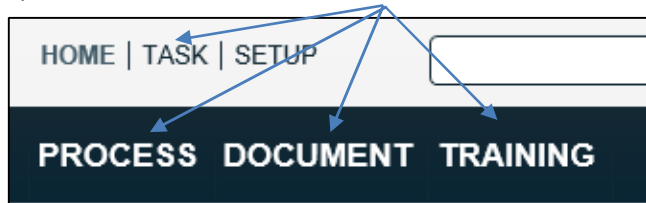
There is also a **Recent Items** view with links to anything recently opened such as Training Activities, Documents, Processes, Folders, etc. It will hold up to 100 items so is a handy way to quickly get back to something you have worked on recently.



The size of the entire screen can be adjusted to better fit with your monitor or mobile device needs. The **Quick Access Menu** provides a quick way to jump to tasks you have logged in to perform.



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. The **SETUP** option is for Administrators.



Notice the more detailed menu options that become available when choosing a specific QM10 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.

TASK	PROCESS	DOCUMENT	TRAINING
My Tasks All Due this week / last week Due in +-30 days Due in +-90 days Overdue Completed in last 90 days	My Processes Outstanding Received this week / last week Received in last 30 days Received in last 30 to 60 days Received in last 60 to 90 days Acted on in the last 90 days	To Process All Due this week / last week Due in +/- 30 days Due in +/- 90 days Overdue My Documents Top 30 (last 90 days) Read (last 30 days) Effective (last 90 days) I acted on (last 90 days) I am the author or owner I am the author or owner - by next review date Document Coordinator In process - my In authoring - my In review - my In approval - my To retire - my In retire - my Due for review - my In process - all To retire - all In retire - all Approved, not effective - all Awaiting retire date - all Superseded and retired - all Due for review - all Back from review Rejected during approval	Outstanding Activities All Due this week / last week Due in +-30 days Due in +-90 days Overdue Confirmed in the last 90 days Managers and Trainers Second confirmation required Confirmation overdue Training Coordinators Due this week / last week Due in +-30 days Due in +-90 days Overdue Active by date Active by name Awaiting grades Second confirmation required

Choosing the broadest timeframe (All, Outstanding) will quickly display all pending activities, no matter where the due date may fall or whether there is a due date at all. **Those are the default options for each view.**

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

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
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 <p>Where Estimated End Date or Start is set this week or last week</p>
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



	<ul style="list-style-type: none"> • 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

PROCESS > Views > My Processes

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>
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>



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>
-------------------------------------	--

DOCUMENT > Views > To Process

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 • Where the User has not yet performed review/approval task <p>Results will be ordered by User Due Date, Chronological, Descending</p>
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>



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	Documents at a status of Approved & Effective where the User is the Author or Owner Results will be ordered by document Next Review Date, Chronological
---	--

DOCUMENT > Views > Document Coordinator

In process - my	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. Results will be ordered by document Create Modify Date, Chronological, Descending
In review - my	Documents at a status of Pending Review, where the logged in User – whether a Document Coordinator or not – is the Create Modify By User. 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
In approval - my	Documents at a status of Pending Approval, where the logged in User – whether a Document Coordinator or not – is the Create Modify By User. 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
In authoring - my	Documents at a status of Authoring, where the logged in User – whether a Document Coordinator or not – is the Create Modify By User. 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
Due for review - my	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. Results will be ordered by Next Review Date.
The following options will return results only for Users with the SOLABS Document Coordinator role assignment.	
In process - all	All documents at a status of Authoring, Pending Review or Pending Approval. Results will be ordered by document Create Modify Date, Chronological, Descending
To retire - all	All documents at a status of To Retire, meaning a document retirement has been initiated. Results will be ordered by the date the retire option was initiated.
In retire – all	All documents in an active Retire Cycle, pending the required approvals. Results will be ordered by the date the Retire Cycle was initiated.



Approved, not effective – all	All documents at a status of Approved, Not Effective. Results will be ordered by the document Effective Date, Chronological, Descending
Awaiting retire date – all	All documents with a completed Retire Cycle but where the Retire Date was set in the future and has not yet been reached.
Superseded and retired - all	All documents currently in a status of Retired or Superseded. Results will be ordered by the date retired or superseded.
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	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	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

All	Active Training Activities <ul style="list-style-type: none"> • Where the User has not completed training Results will be ordered by User Estimated End Date (or User Estimated State Date where no Estimated End Date is set), Chronological, Descending
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	<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 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 <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>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>

TRAINING > Views > Managers & Trainers

Second confirmation required	<p>Active Training Activities established to require a Second Confirmation (but not necessarily awaiting one at that particular time).</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	<p>All active Training Activities established to require a Grade and actually awaiting entry of a grade for a confirmed user.</p> <ul style="list-style-type: none">• Where there are confirmed Users for whom a grade has not yet been entered. <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>
Second confirmation required	<p>All active Training Activities established to require a Second Confirmation (but not necessarily awaiting one at that particular time).</p> <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>