SOLABS QM10: DOCUMENT Section: Document Ownership

Introduction

Document Ownership attribute information can be established for documents in SOLABS QM10 to help define the various aspects of Document Management and trigger related document management workflow Notifications.   The following Document Ownership attribute categories can be established as defaults for each Document Type but can be changed if needed when authoring a document.

- Originator (Author)
- Document Owner
- Document Coordinator

Starting with QM10 Release 10.9.0, Notifications regarding any upcoming Periodic Review requirements will go to the Originator (Author), Document Owner and Document Coordinator if those attributes are entered for the document.

Document Ownership Settings for Document Types:

When creating a **Document Type** as part of **SETUP** activities, one of the sections to complete is the **Document Ownership** section. Each category can be set as mandatory, and default values can also be defined.

- Originator (Author) – author of the document; defaults to the initiator but can be set to another User
- Document Owner - the person who holds responsibility for the actual "creation/maintenance" of the **content** of the document.
- Document Coordinator – the person facilitating the "processing/monitoring" of documents through their **workflows**.

When ownership categories are selected as Document Type defaults, they will be displayed for the author and must be filled in, either with the default setting or another setting.   If set as mandatory they can have default values.
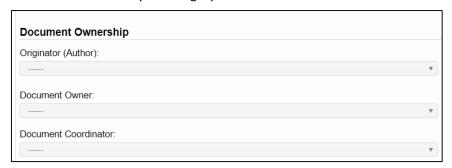
When a Default Value is chosen for the **Originator**, a drop-down list of SOLABS QM10 Users will be displayed to choose from.

When Default Values are chosen for the **Document Owner** and/or **Document Coordinator**, drop-down list of SOLABS QM10 Function (FCT) Roles will be displayed to choose from.

Creating and Revising Documents – the Document Ownership fields:

If Document Ownership categories are not established at the Document Type level, they will not be required for authors to fill in – they will be grayed out.
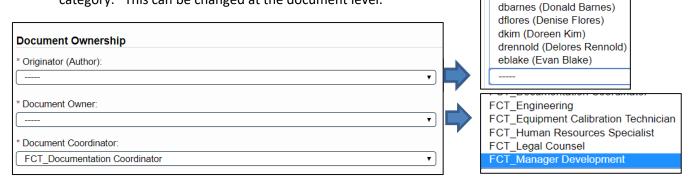

Users/roles can still be selected for Review Cycles and Approval Cycles after the Author Submits the document but establishing document ownership attribute information would not be required.

When Document Ownership categories are established at the Document Type level, the author will be required to fill in the related information before they can **Submit** the new/revised document they are working on.

In the example below, all three categories were selected for this Document Type.

- All were established as mandatory, as identified by the asterisk
- A Default Value – FCT_Documentation Coordinator – was chosen for the Document Coordinator category.   This can be changed at the document level.

If the person initiating the new/revised document is the Author, they will select themselves as **Originator (Author)**. If they are entering the metadata on behalf of someone else, they may select that person.

If the document being created/revised is a QC Laboratory Test Method or Specification, the Function Role FCT_QC Manager might be selected as the Document Owner.

The Document Coordinator field has a default value in this case, it can be changed to another FCT Role if someone other than the person with the FCT_Documentation Coordinator role assignment will be managing the workflow of this particular document.

When Function Roles are selected, anyone with that role assignment will receive related document workflow Notifications.   Periodic Review notifications are enabled starting with QM10 Release 10.9.0.