SOLABS QM10
Retiring a Document

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Introduction

This document provides a summary of the various document statuses in **SOLABS QM10** and covers the process for totally Retiring an existing document, instead of Modifying it to replace it with a newer version.

To retire a document in **SOLABS QM10**, you will need at least **Modify** privileges to the related folder.

A **Retired** status is available as part of the life cycle in the DOCUMENT section. The Document Control Process also includes an option for **Retire** at Step 1 in the workflow. This allows initiators to request the retirement of a document and get Owner-Manager approval before the workflow goes to the Document Coordinator for the process described in this document.

Document Statuses in SOLABS QM10:

The following table describes the various **Document Statuses**, as well as the visual clues that provide information to you about the status of the document you are viewing.

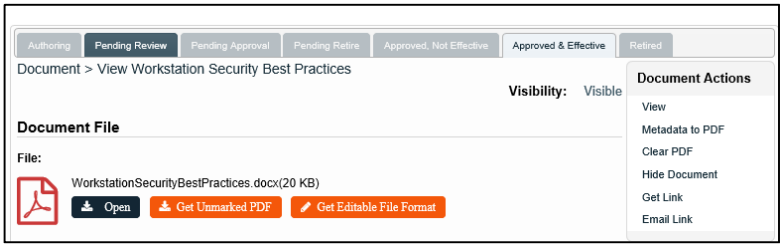
Document Status	Meaning
Authoring	This **Document** is in the process of being written or revised. At this stage, it does not yet have official **Status**, and, depending on your configuration, is only available, visible and/or editable to **Document Coordinators** (and related **Roles**) and/or the **Author.**
Pending Review	This **Document** is in an active **Review Cycle** and is **Awaiting Review** from one or more of the assigned **Reviewers**.
Pending Approval	This **Document** is in an active **Approval Cycle** and is **Awaiting Approval** from one or more of the assigned **Approvers**.

Pending Retire	This **Document** is in an active **Retire Cycle** and is **Awaiting Retire Status** from one or more of the assigned **Retirers.**
Approved, Not Effective	The **Approval Cycle** for this **Document** is complete. It is now **Approved**, but has not yet been made **Effective**. The only remaining steps for this document are for the **Document Coordinator** to change the status to **Effective**, or for a pre-determined **Effective Date** to be reached.
Approved & Effective	This is the current, official version of this **Document** — it has been put to a status of **Effective** by a **Documentation Coordinator** or has reached the pre-determined **Effective Date** and has automatically been made **Effective.**
Retired	This **Document** has been retired from active use and is therefore no longer **Effective.** It is archived and can be retrieved through the Audit Trail by SOLABS Document Administrators in case it ever needs to be re-activated and/or used partially or wholly in another **Document.**

Document Status Tabs – Visual Indication of Status

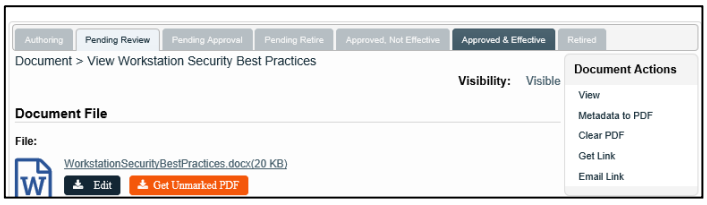
Document life cycle status tabs are visible at the top of a **Document** screen, whether in **View** mode or in **Modify** mode. The light grey tab indicates the status of the version you are currently viewing or working on. A dark grey tab indicates another status of the same document.

In this example, the information for the **Approved & Effective** version of this document is being viewed. The dark grey color of the **Pending Review** tab indicates that another version of this document is in progress and is in an active **Review Cycle**.



You can toggle back and forth between the two active statuses by clicking on the light grey and dark grey tabs.

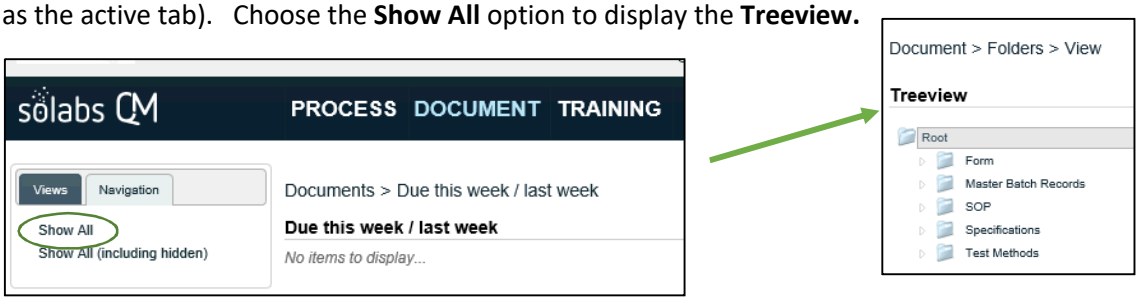
NOTE: The **Approved & Effective** version is in PDF file format while the **Pending Review** version is in Word format – another visual indicator of status.



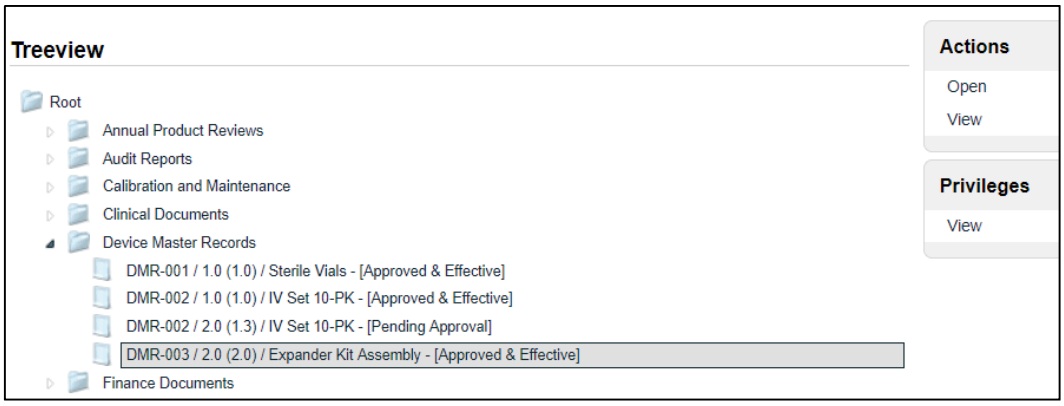
Retiring a Document

Locating the Document

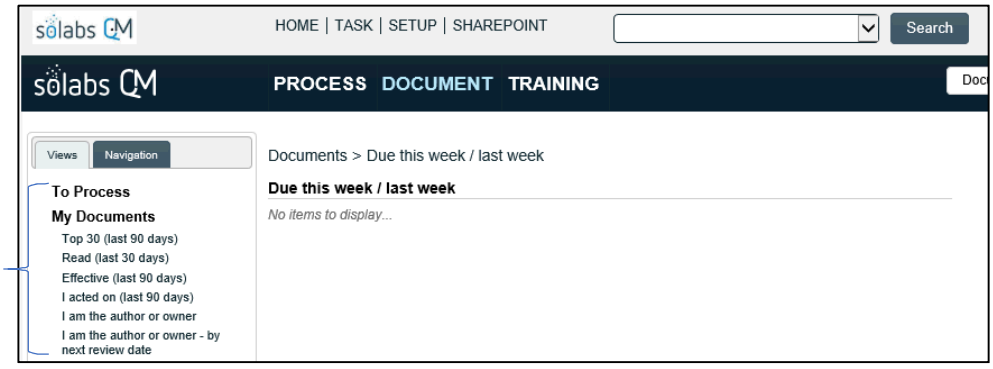
As a user with at least Modify privileges, choose **DOCUMENT** from the main menu at the **SOLABS QM10 Home** page. Click on the **Navigation** tab on the left-hand side of the screen (light blue color indicates it as the active tab). Choose the **Show All** option to display the **Treeview.**



Open the folder location for the document you wish to revise. Locate the document and highlight it. Double-click the listing or click **Actions > View** from the right-hand menus to get to the **Document > View** screen for the document metadata.

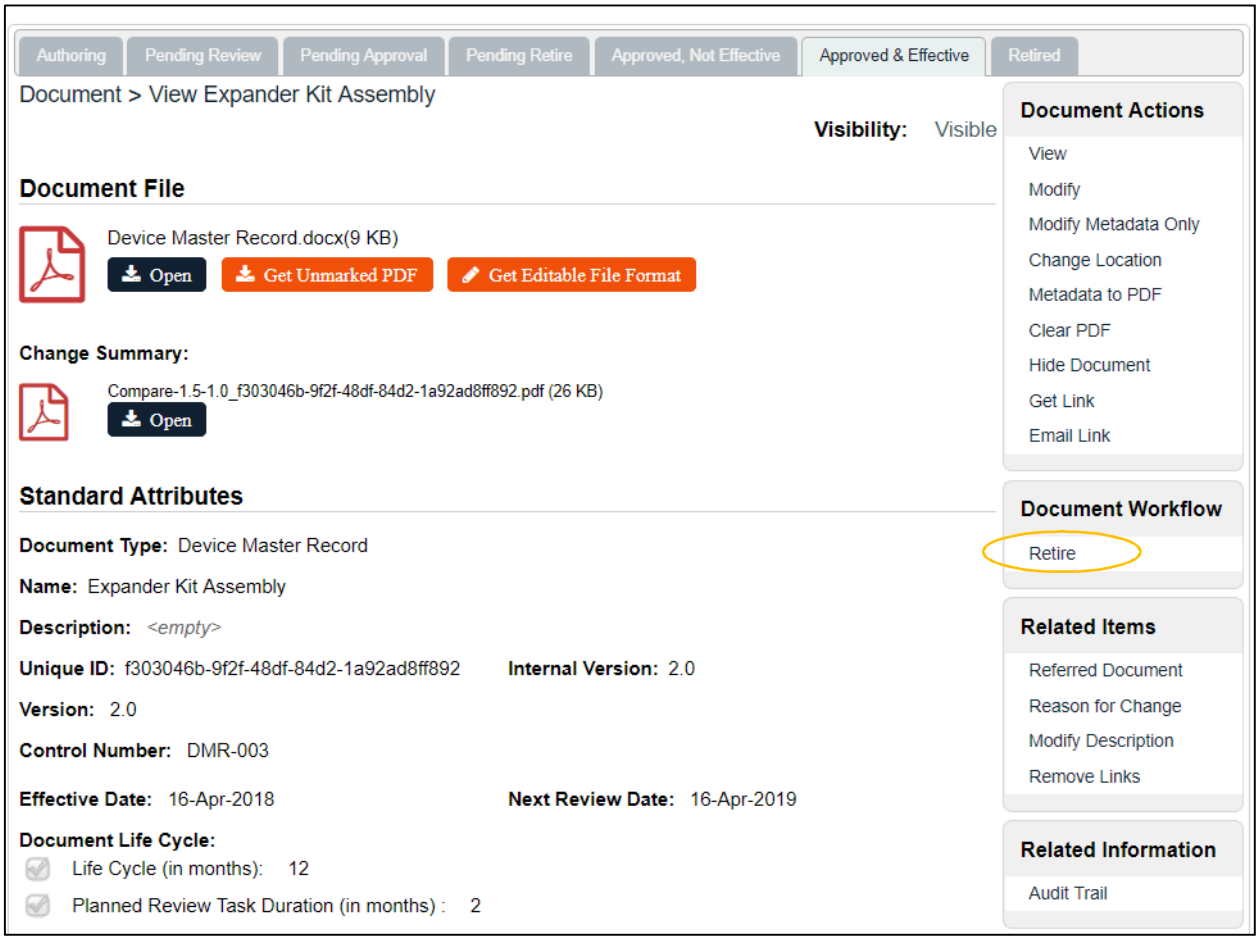


You can also search for the document using the **Views** tab on the left-hand side in the **DOCUMENT Section,** or use the Search field at the top of the page.

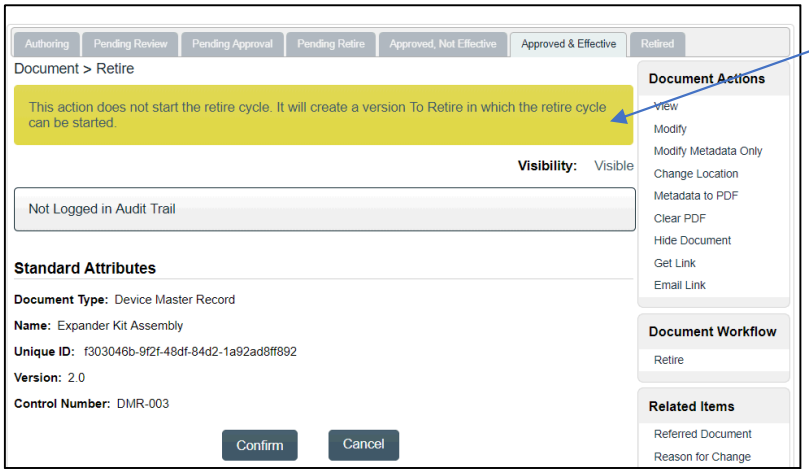


Once you have located your document, double-click the listing or click on the **View** option to open the **Document > View** screen. The document must be in **Approved & Effective** status in order for you to initiate a Retire Cycle.

On the right-hand **Document Workflow** menu, choose **Retire**.



The **Document > Retire** screen appears.

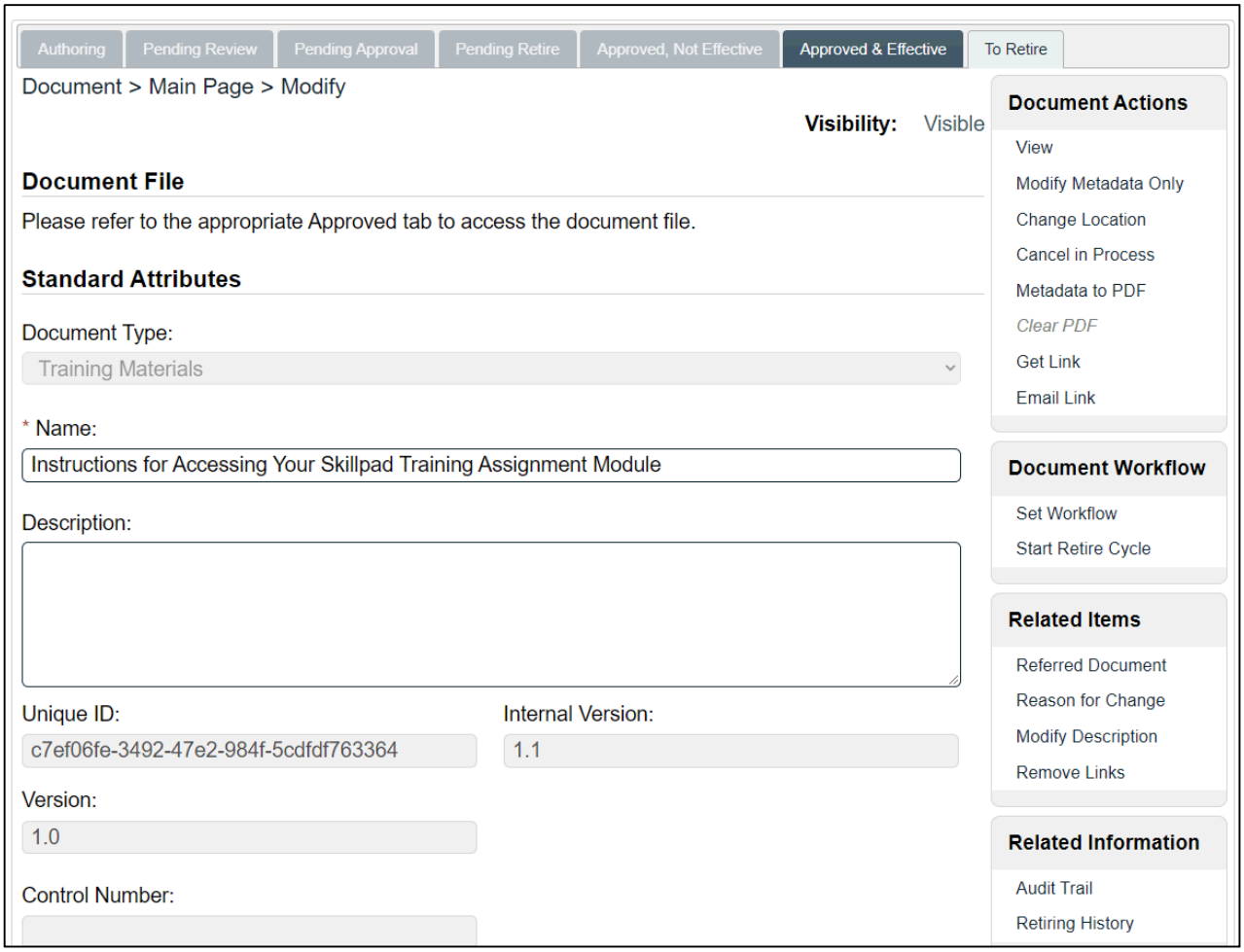


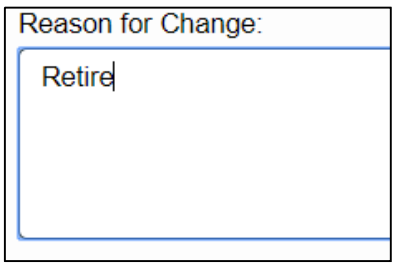
This screen displays a Note in a Yellow-shaded area that reads **"This action does not start the retire cycle. It will create a version To Retire in which the retire cycle can be started."** This is a new Internal Version that will be used to circulate the Approved & Effective version for approval of retirement.

Click the **Confirm** button to get to the next screen.

Note the following on this **Document > Main Page > Modify** screen:

- The **To Retire** tab is active.
- The document **Version** field is not enabled and displays the same version as the Approved & Effective document.
- The **Internal Version** field is not enabled and displays the next internal version.
- The right-hand **Document Workflow** menu includes a **Start Retire Cycle** option.
- The right-hand **Related Information** menu includes a **Retiring History** option.

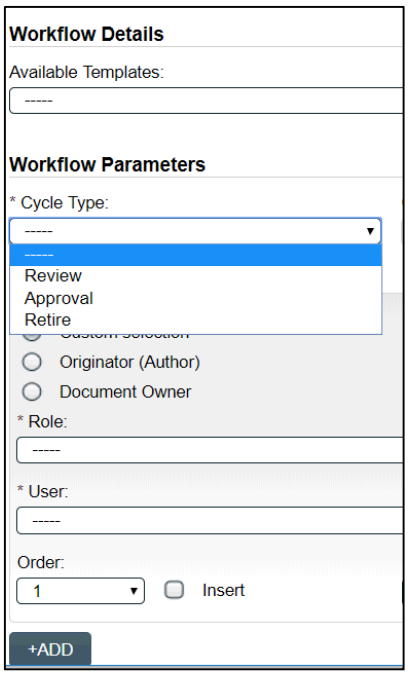




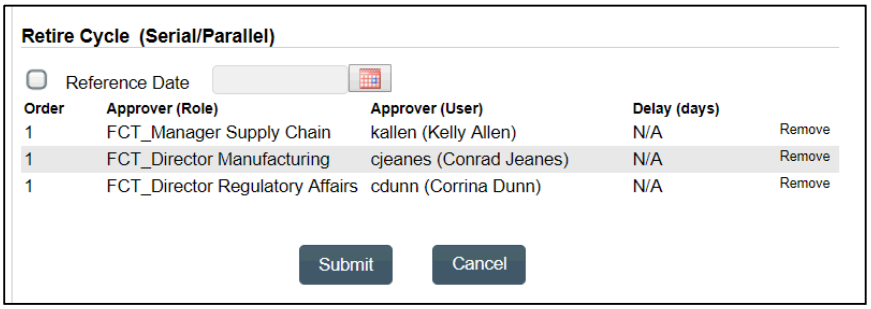
The **Reason for Change** field will still be enabled and can be used to include a reason for the document Retirement if appropriate.

Click **Submit** and then **Confirm** to save any changes to this or any other fields.

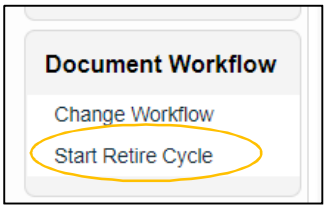
Choose **Document Workflow > Set Workflow** from the right-hand menus. As with the document Revision process, you will be then be able to select people for the Workflow – in this case to approve the Retire Cycle for the document. You can choose from available **Document Workflow Templates** or add people individually. See higher level documents on the SOLABS QM10 DOCUMENT Section for specific details on using these fields.



Once the people are selected for the **Retire Cycle**, click the **Submit** and then **Confirm**.

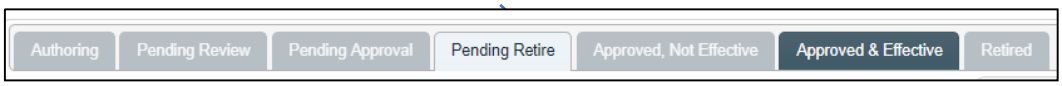


The last step is to select **Start Retire Cycle** from the right-hand Document Workflow menu and then **Confirm**.

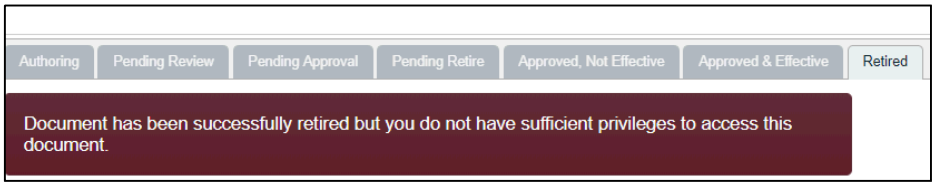


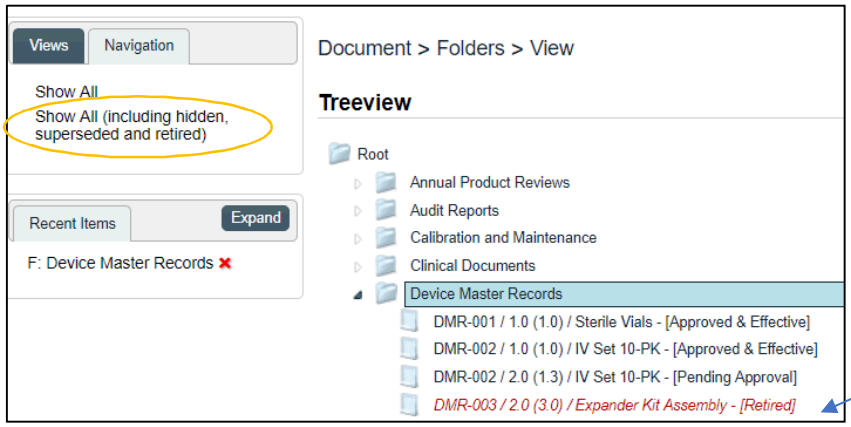
The selected people will receive a Notification and be able to approve the Retirement of the document.

The Status tab will now show **Pending Retire**.



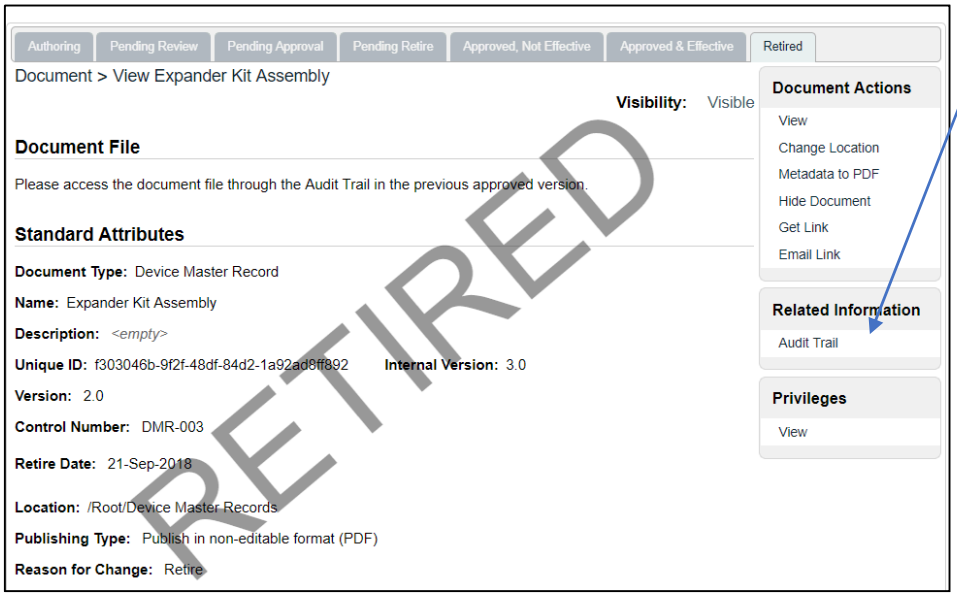
When the last person has completed their approval of the document retirement, they will get the following message (unless they are an Administrator).



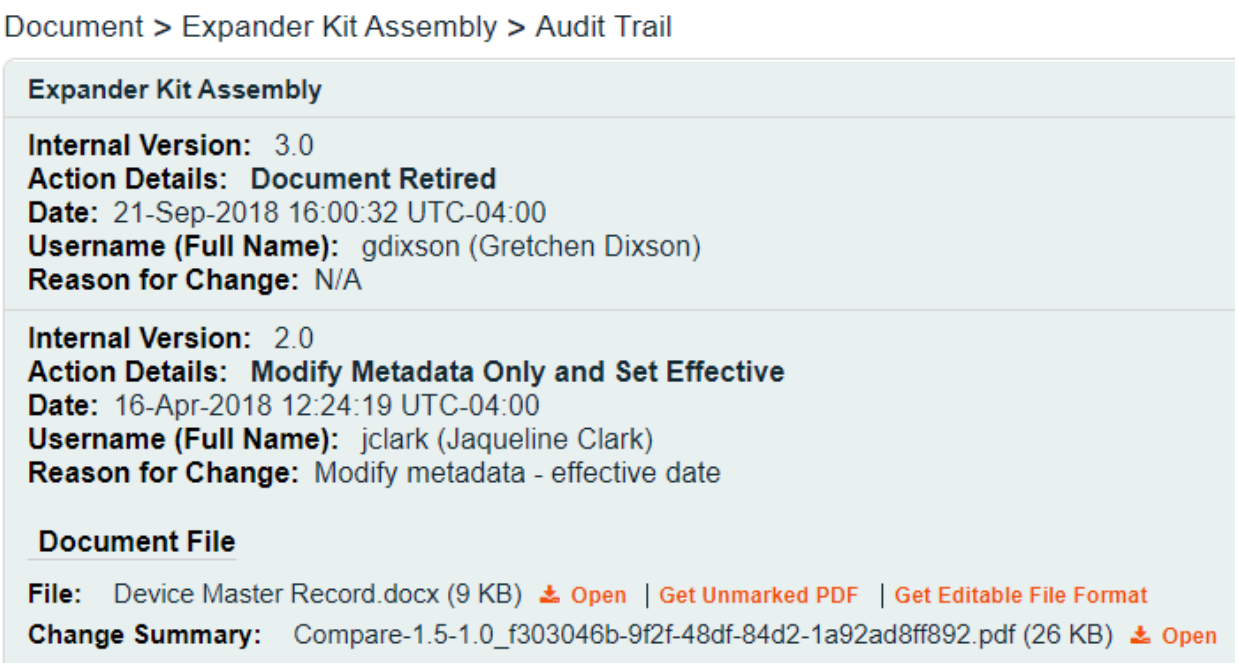


SOLABS System Administrators and SOLABS Document Administrators can use the **Show All (including hidden, superseded and retired)** option on the Navigation tab and will now see retired documents listed in Red.

When an Administrator chooses the **View** option for the Retired document, the screen will include a RETIRED watermark – another visual indicator. In the **Document File** section, it is stated that the file can be accessed through the Audit Trail in the previous approved version.



The **Audit Trail** for the document will provide details and access to the Editable File Content of previous versions of the document should they be needed in the future.

This can be helpful to answer any historical questions or to create a new document - under a different document Name/Control Number - if a retired document needs to become active again in the future.

Access the Audit Trail using the right-hand menu. Expand the Audit Trail for the last Effective version. SOLABS Document Administrators can open both the document file and the compare file. They also still have the options to Get Unmarked PDF and Get Editable File Format.