Q-Pulse instructions – Document management

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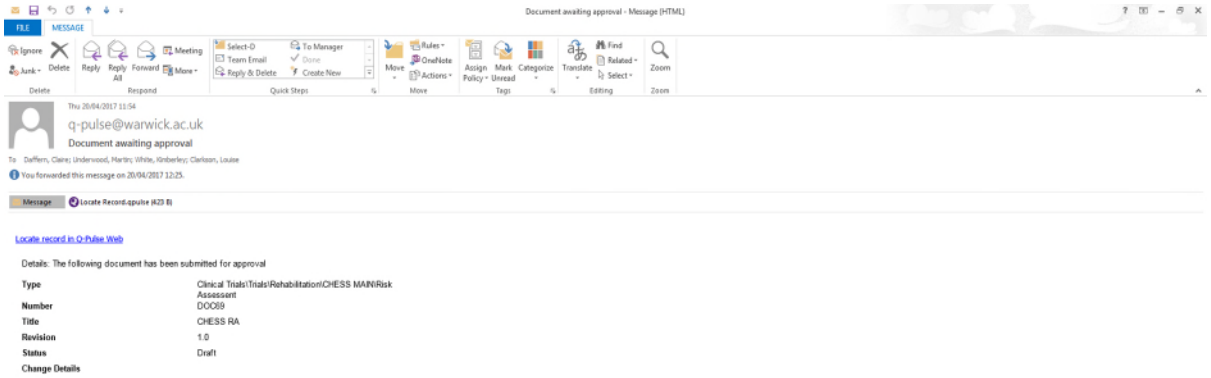
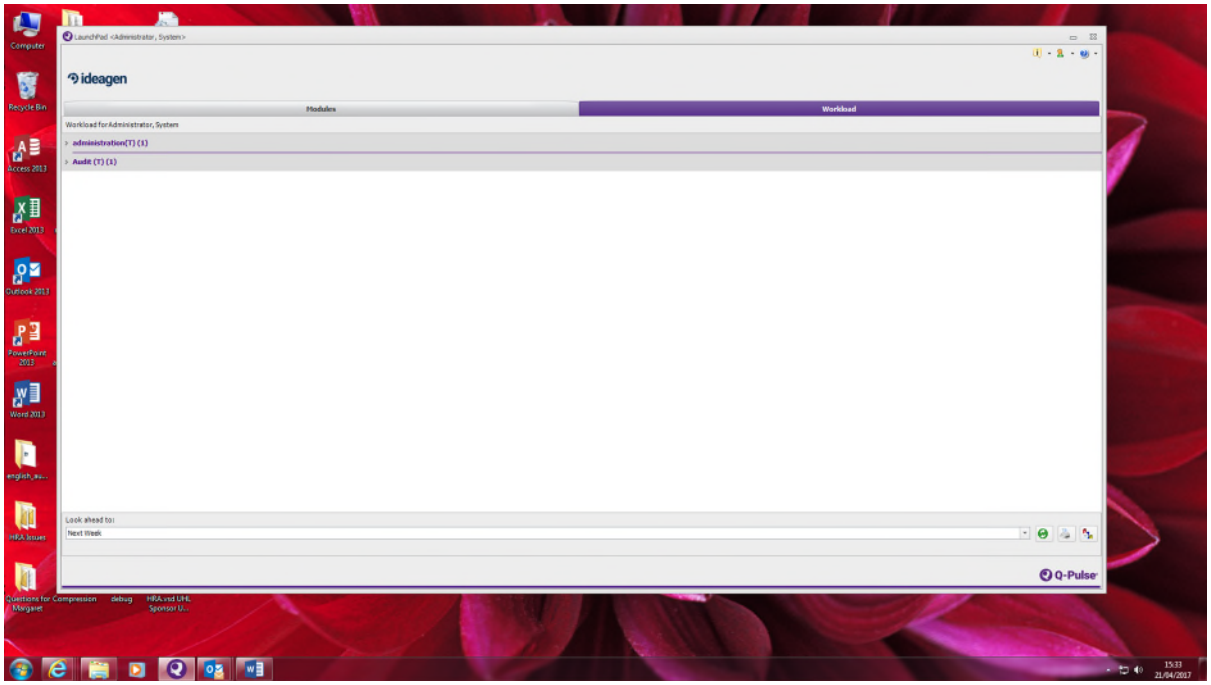
Approving a new version of a document

When a revised or newly created document is loaded into Q-Pulse to be formally approved, the named approvers will receive an email from the system:



Log –in to Q-Pulse.

Click on the Workload tab at the top of the Launchpad.

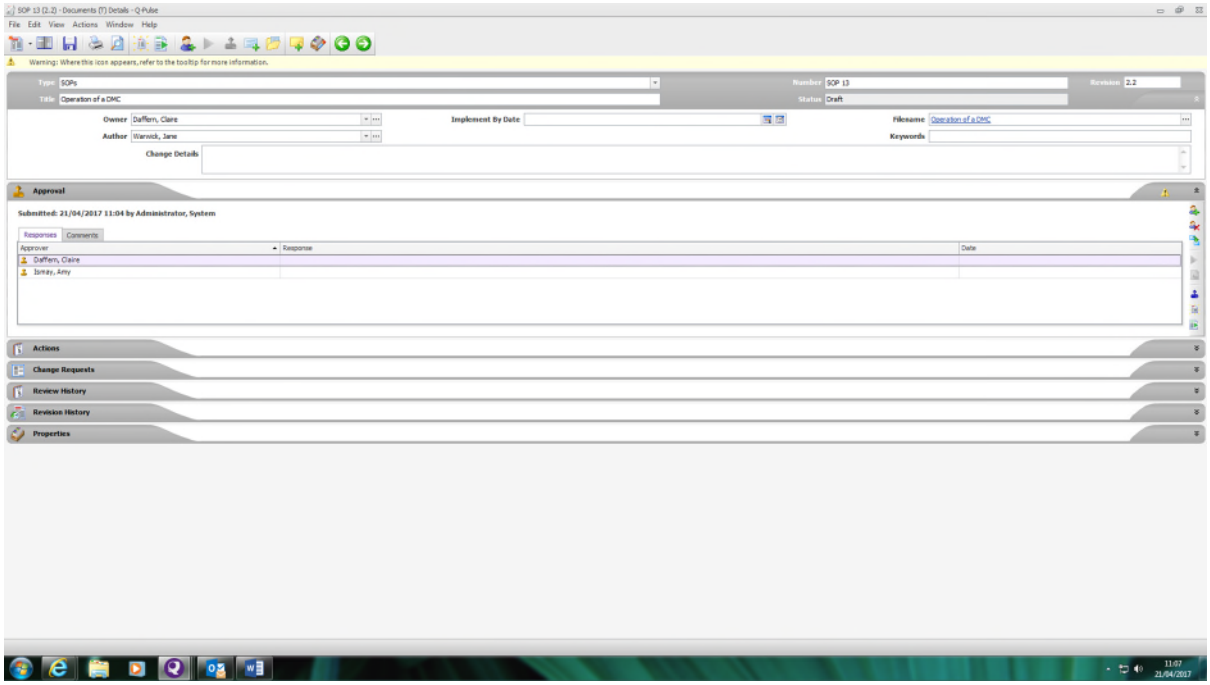


A header; ‘Documents’ will be seen, open the section by clicking on the grey arrow to the left hand side of the text. You will see a blue number underlined – this is the link to the document record you need to access.

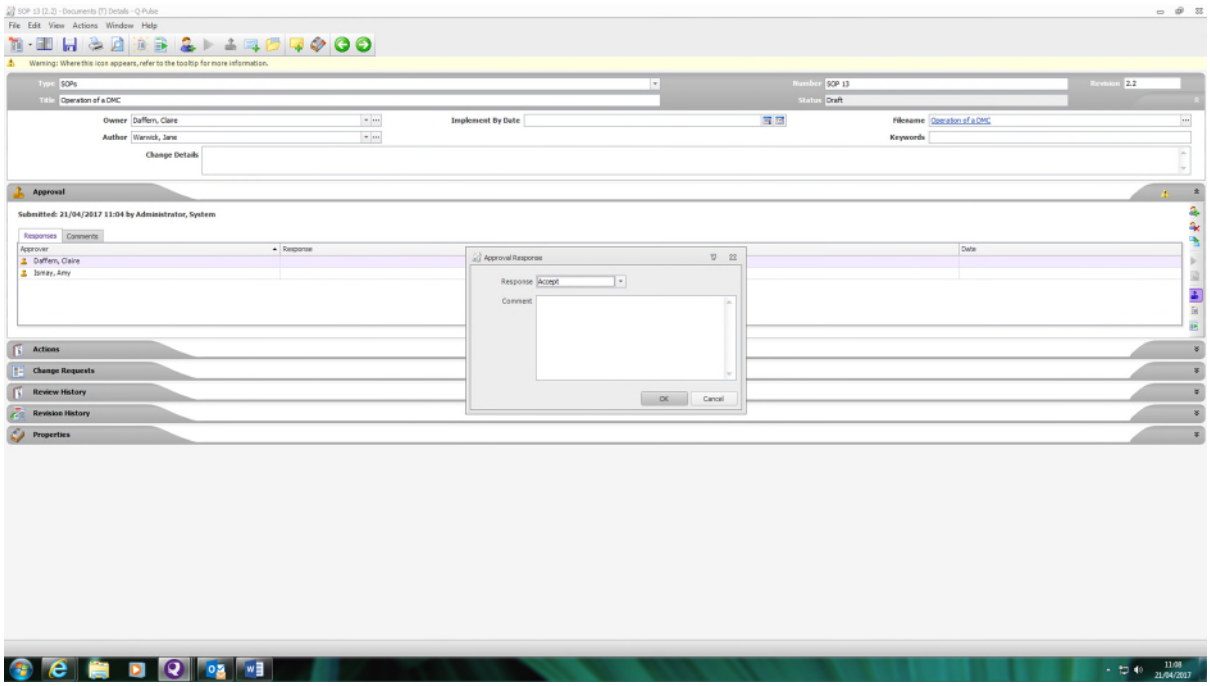
Click on the blue link and open the document record.

The Approval section will show a yellow triangle – this indicates a task is required.

To approve the document, highlight your name and click on the blue stamp icon (right hand side)

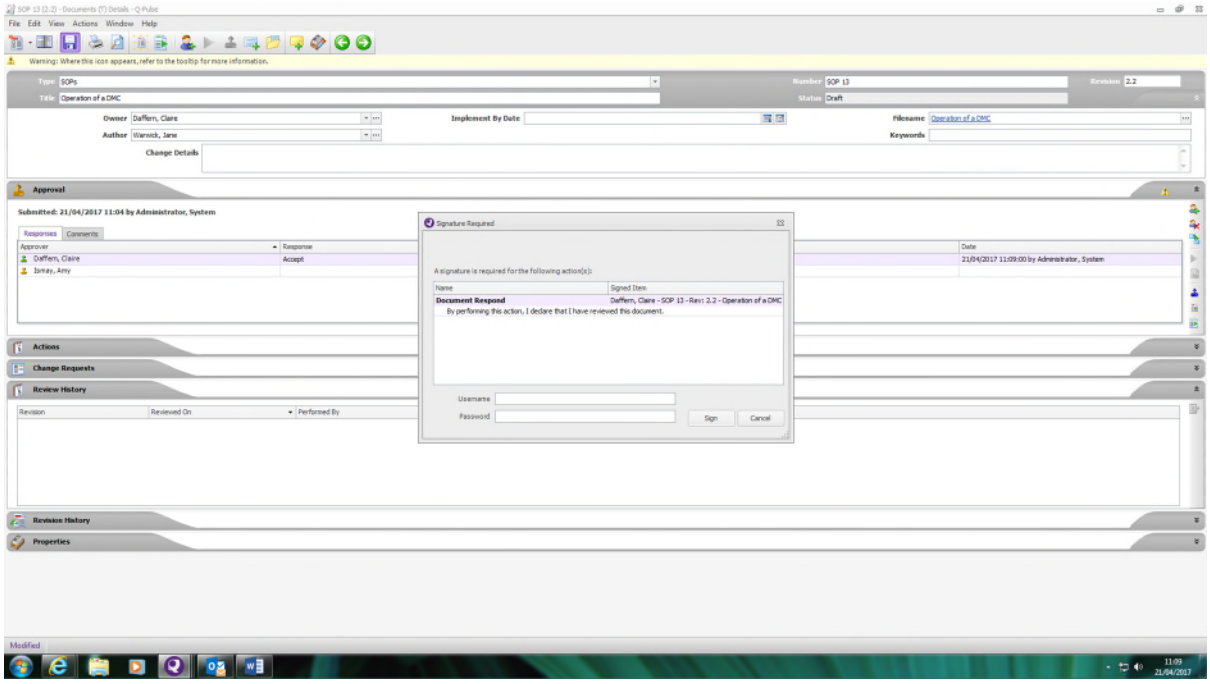


The 'Approval Response' box appears – select Accept and OK

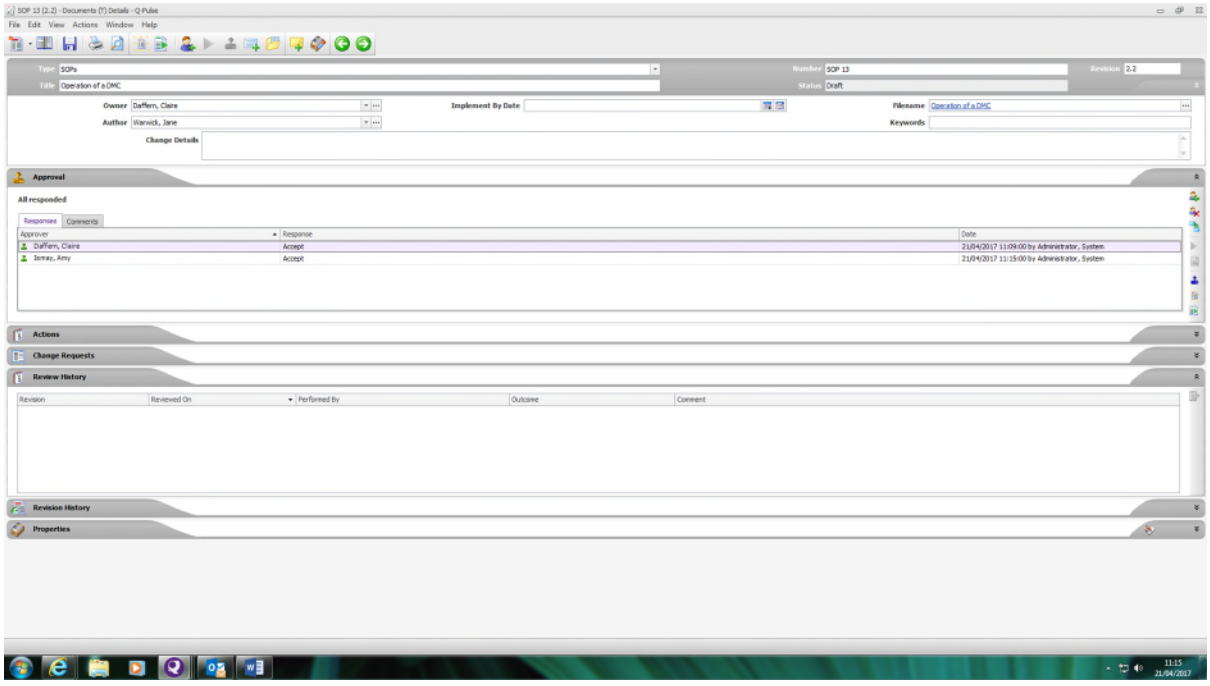


Save the record (Ctrl+S or click on save icon)

The 'signature required' box appears – insert your username and password – this inserts your electronic signature – and click Sign



The date and time of the addition of the approver's signature is added and the icon alongside the approvers name changes from orange to green to indicate the action is complete.



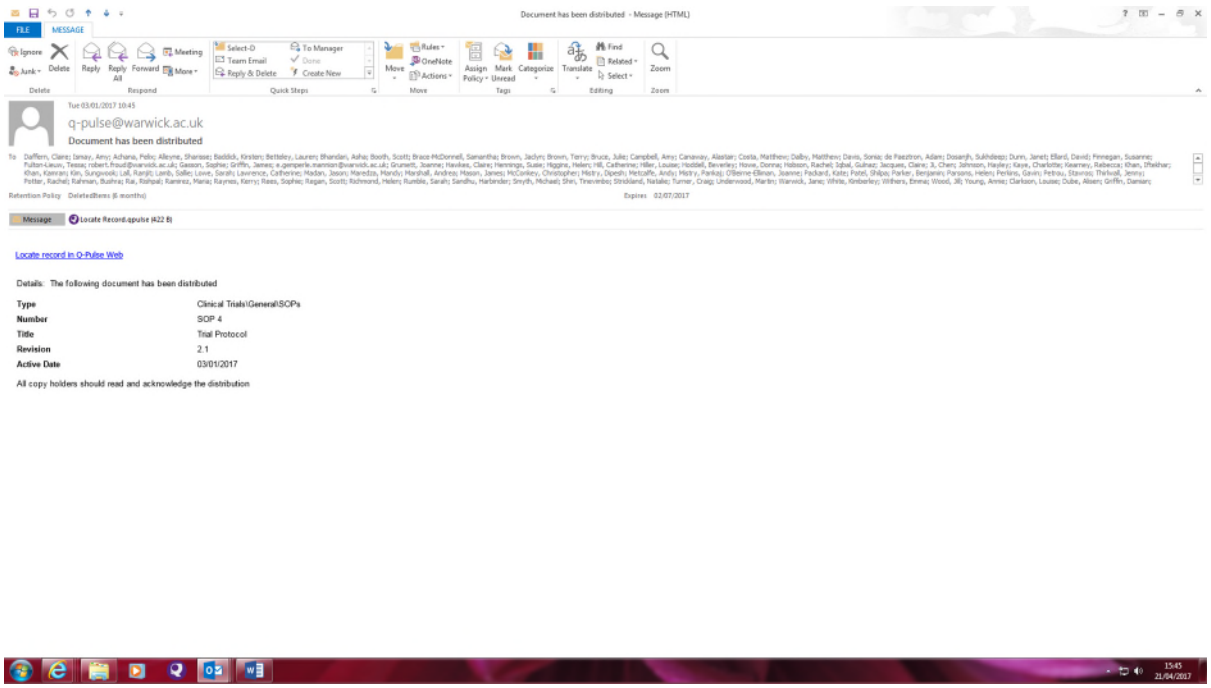
Close Q-Pulse.

Acknowledging you have 'read and understood' new version of a document

(This will automatically update your electronic training record)

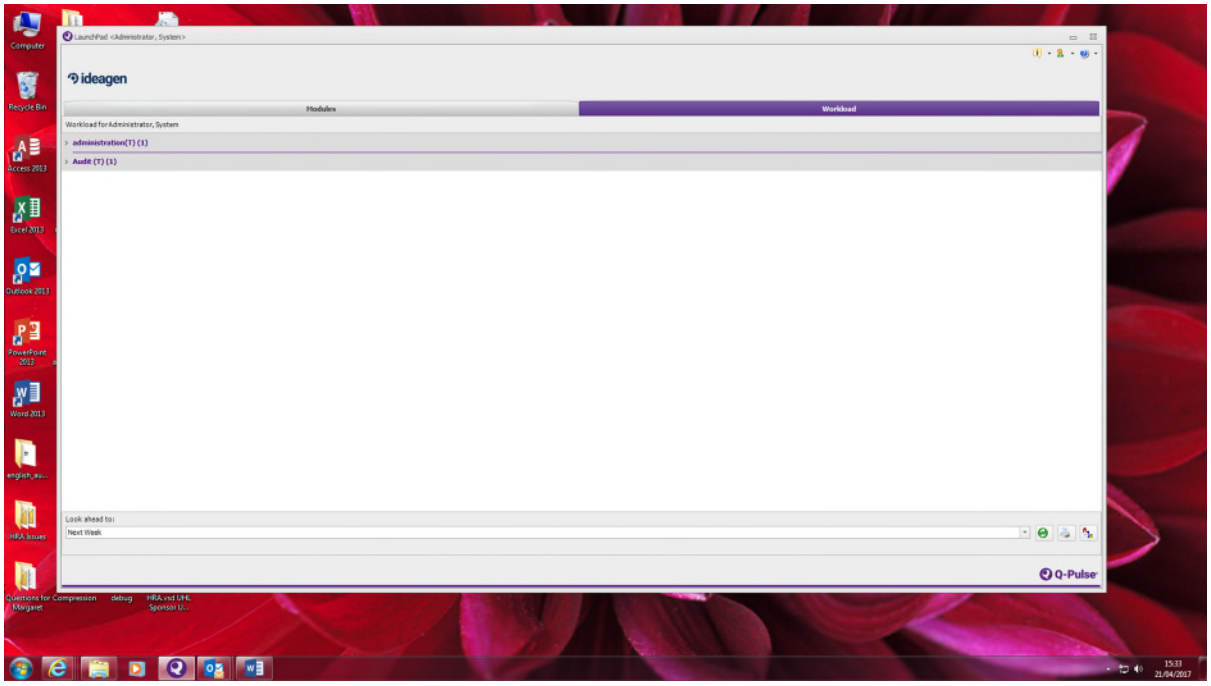
When a new version of a document has been created and approved, it may be necessary for individuals to acknowledge that they have read and have also understood the revised document – this is required for SOPs which are relevant to particular roles and also to some key trial documents where it is necessary to demonstrate an awareness that changes have been made.

The document owner will compile a list of 'copyholders' who must acknowledge that they have read the new/revised document and the Q-Pulse system will send each copyholder an email informing them that they have a task to complete:



Log –in to Q-Pulse: User name (surname followed by first initial) and password

Click on the Workload tab at the top of the Launchpad.



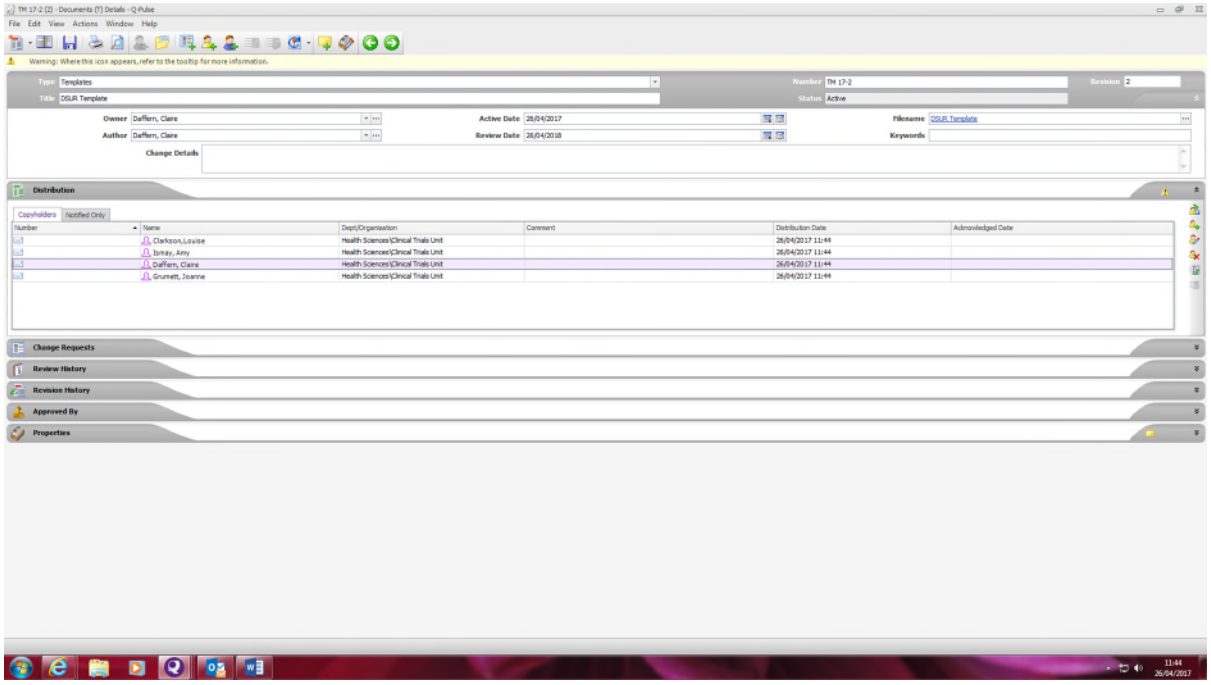
Open the documents section and click on the underlined number in blue font to the right hand side.

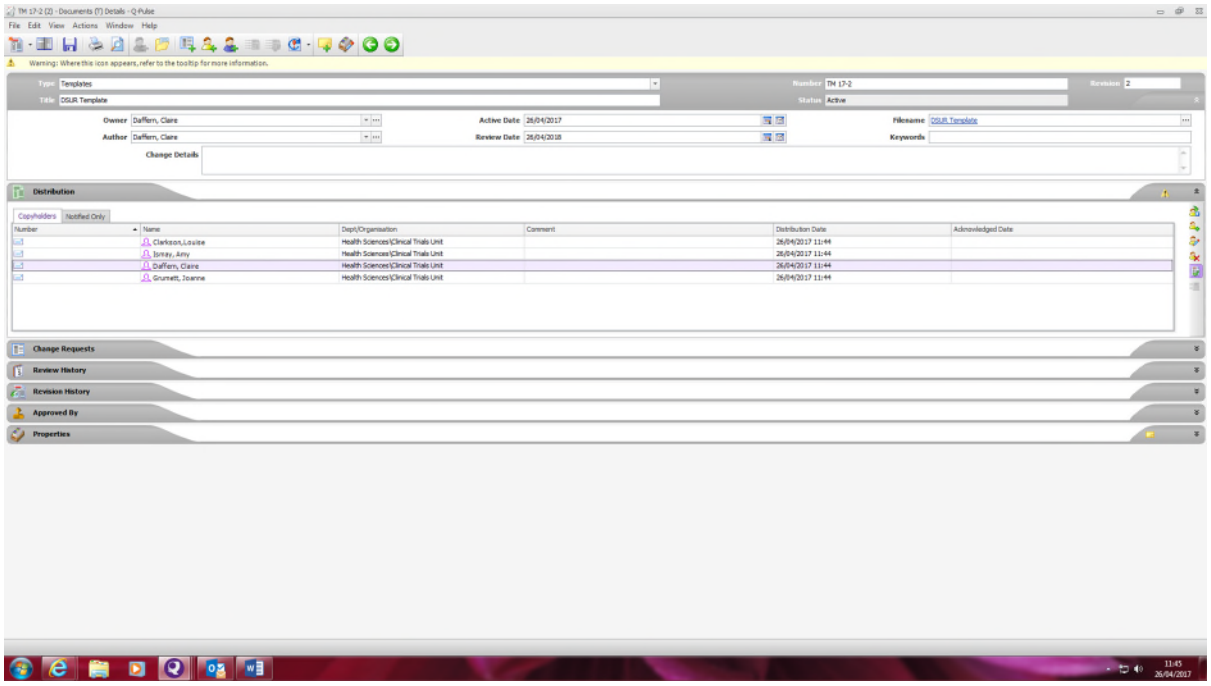
This will open the document record.

Read the document which can be accessed from the link (blue text, underlined) in the Filename section.

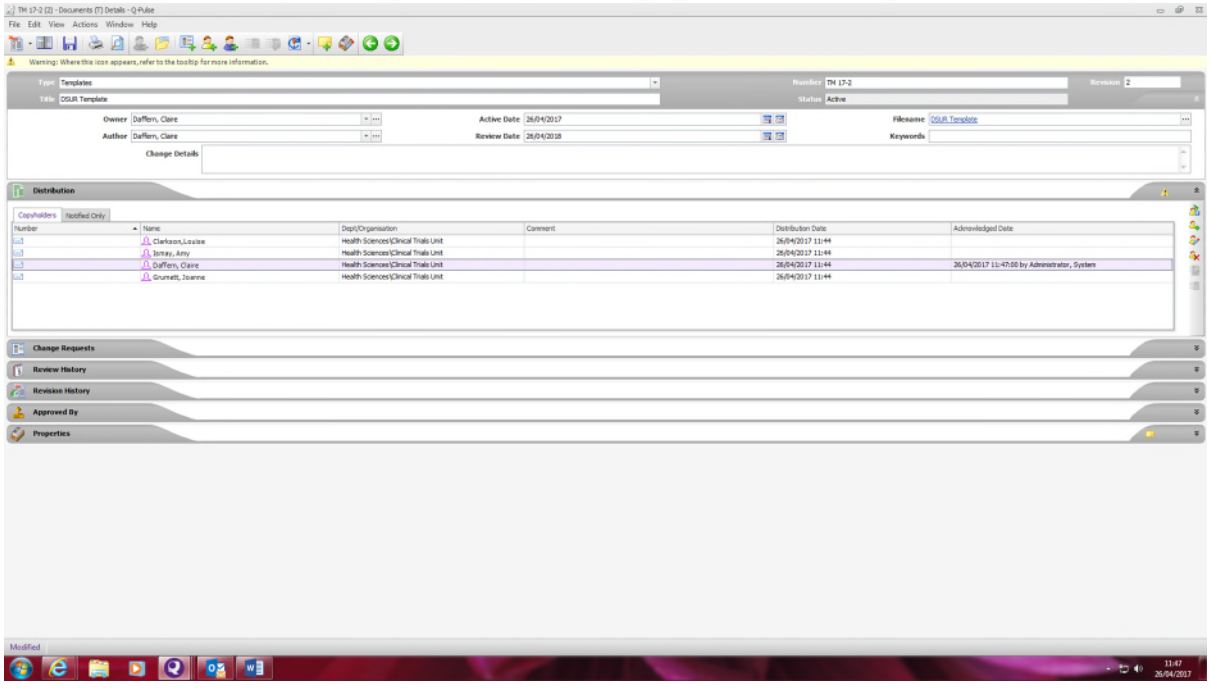
Open the Distribution section in the document record. (there will be a yellow warning triangle to show an action is required).

Locate and highlight your name from the copyholder list.





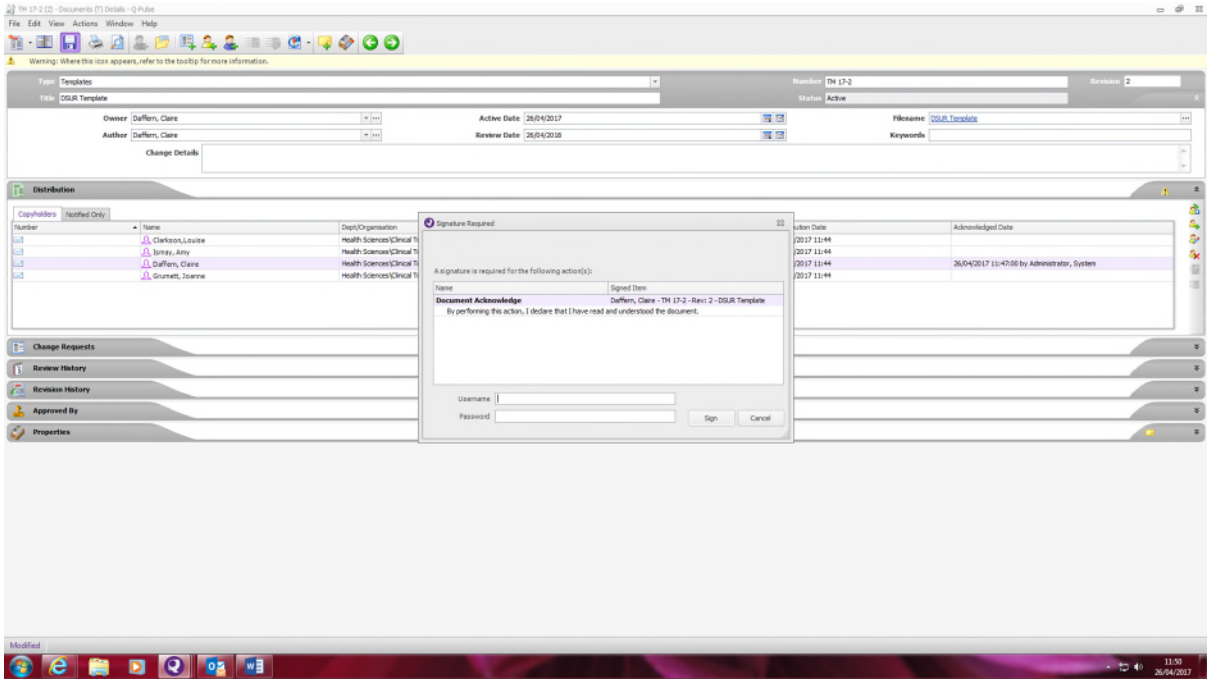
Click on the Acknowledge icon on the right hand side (it looks like a document page with a green tick)



The date and time of acknowledgement will be added onto the record.

Save the record (Ctrl+S or click on save icon).

The Signature Required box appears. It contains the statement: 'By performing this action, I declare that I have read and understood the document'.



Add your Q-Pulse Username and password.

Click Sign.

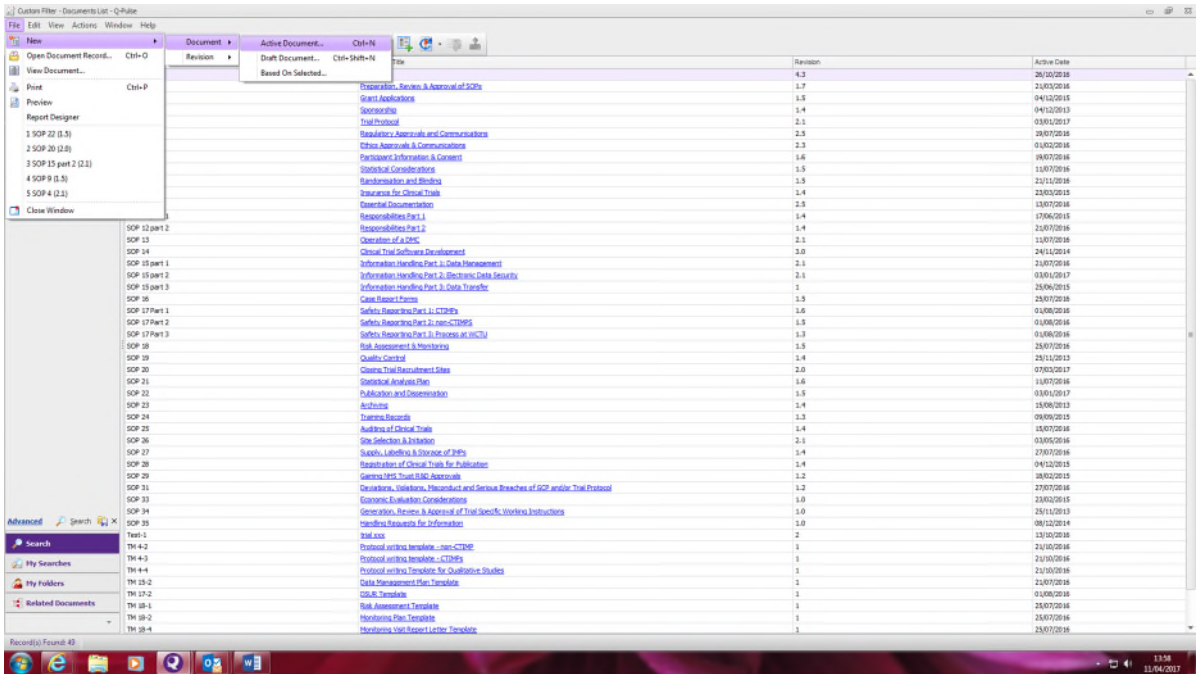
Close the document record.

Uploading a new 'active' document

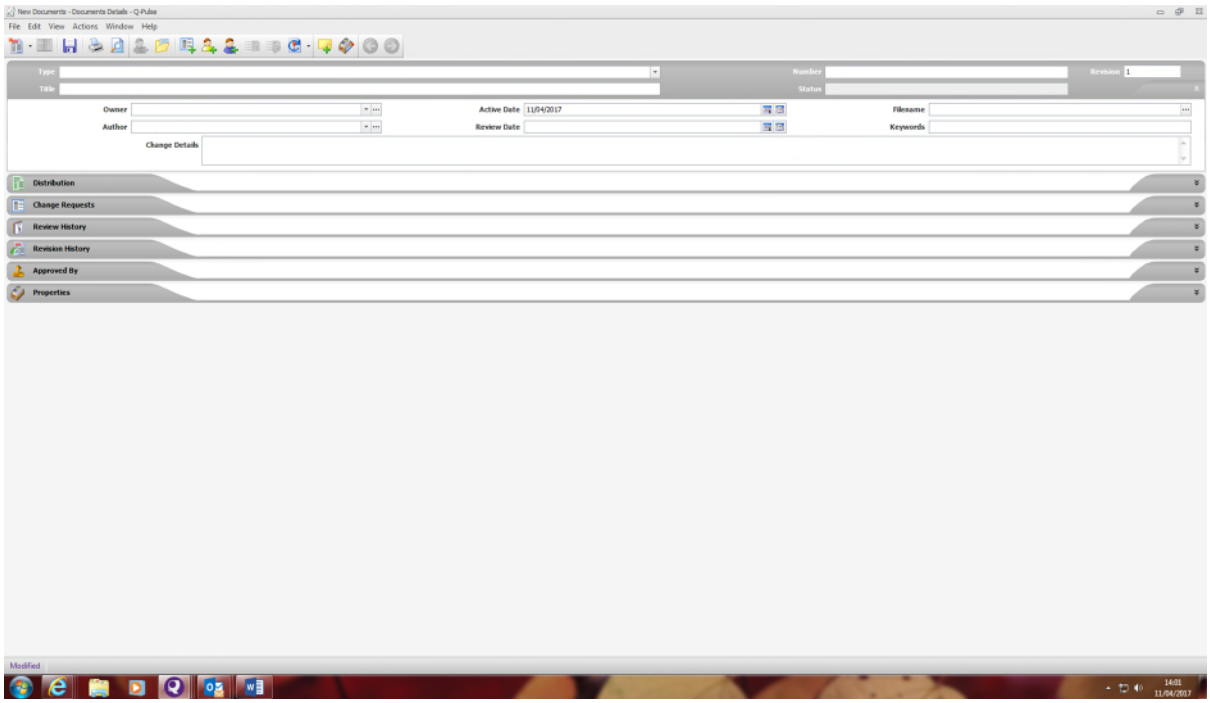
(current approved document)

Log–in to Q-Pulse. Click on Documents from the Modules section of the Launchpad.

From File menu choose: New – document –active document

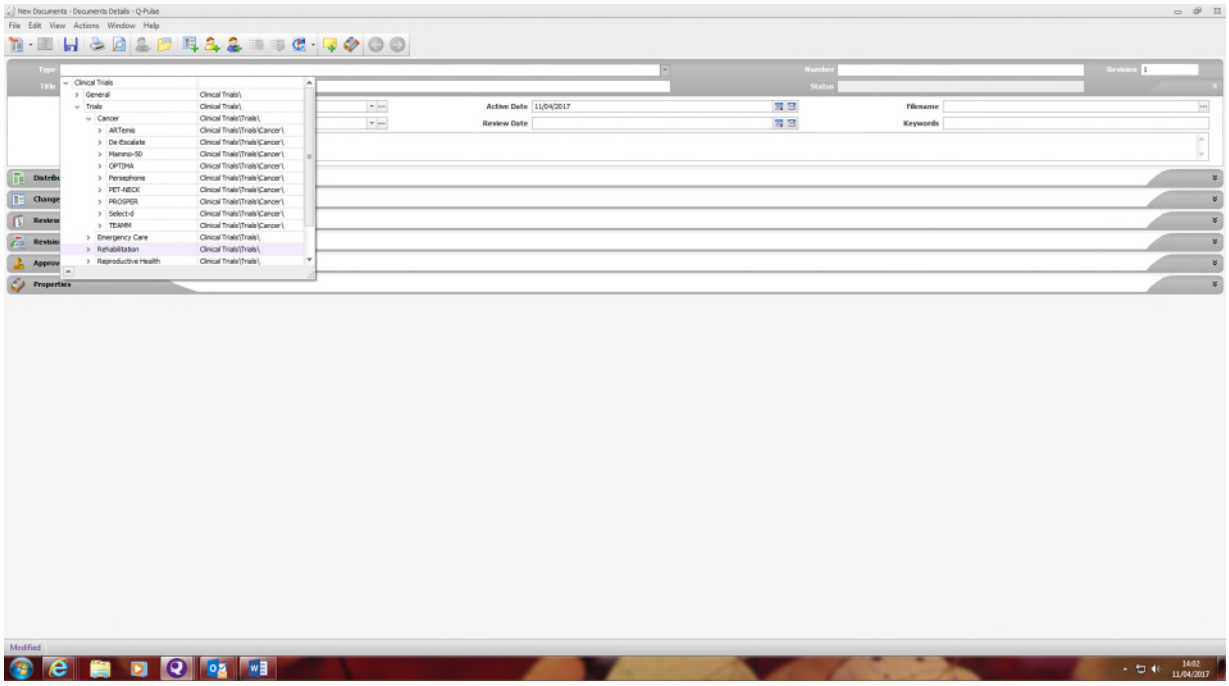


This creates a new document record form:



Insert details of the new document:

Document 'Type' details: Drill down from the drop down menu (use grey arrow on the left of the text) to find the relevant document type in the relevant trial's section.

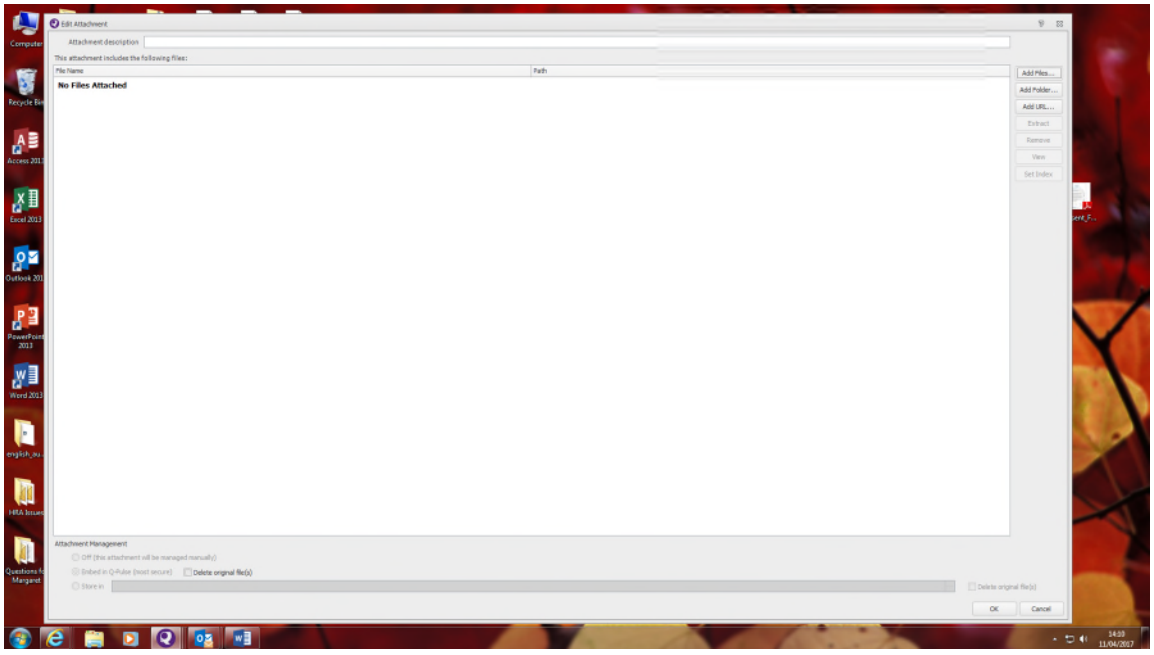


Insert revision (version) number.

Add document title.

Allocate owner & author: type in first few letters of the person's name and options will appear to select. (Usually TC)

Upload document by clicking on the 3 dots in the filename field and click on 'add files' from the menu on the right to browse your computer.



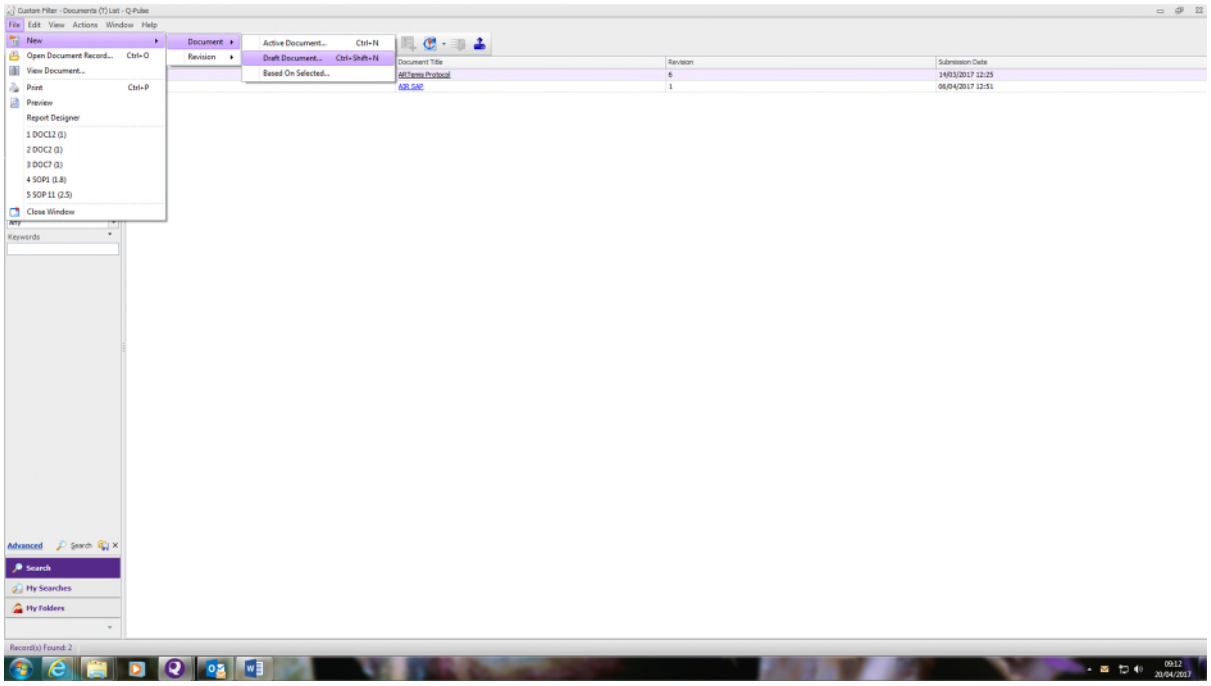
Locate the required document form your files. Press OK to complete upload then Save (Ctrl + S or click on save icon). The document will be visible in the Active register.

Upload a new document which requires approval (to become an active document)

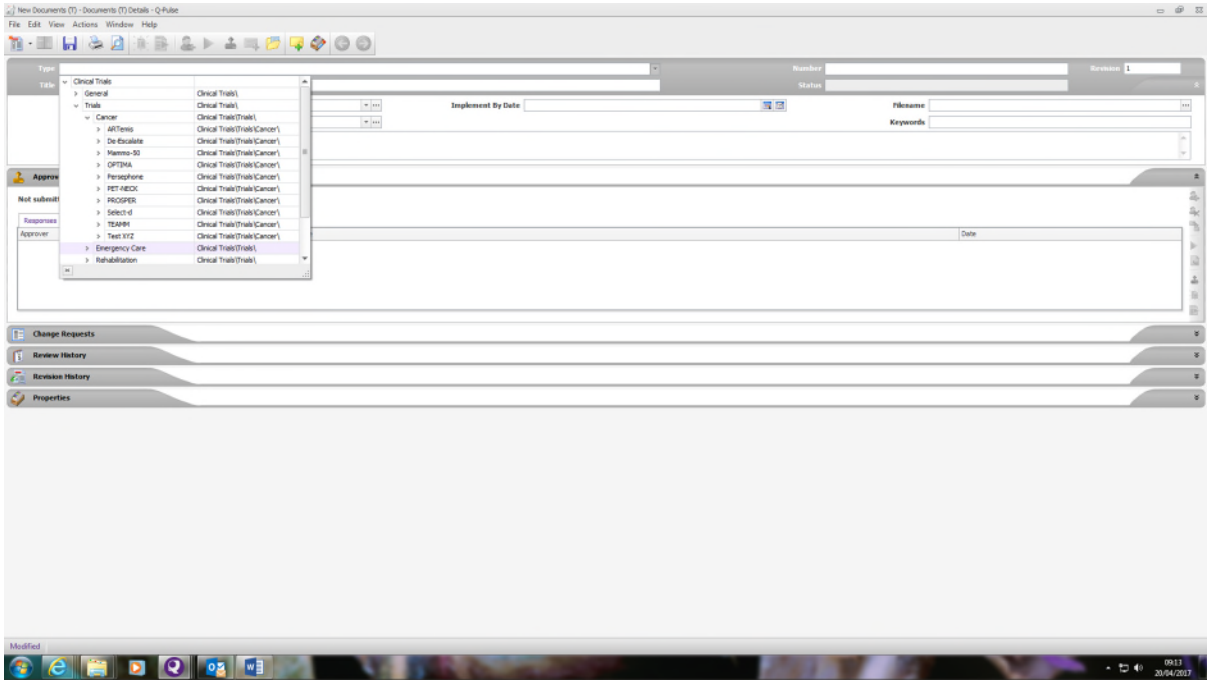
e.g. documents developed for a new trial to be approved prior to submitting to ethics.

Log–in to Q-Pulse. Click on Documents from the Modules section of the Launchpad.

From the File menu select: New – Document – Draft document

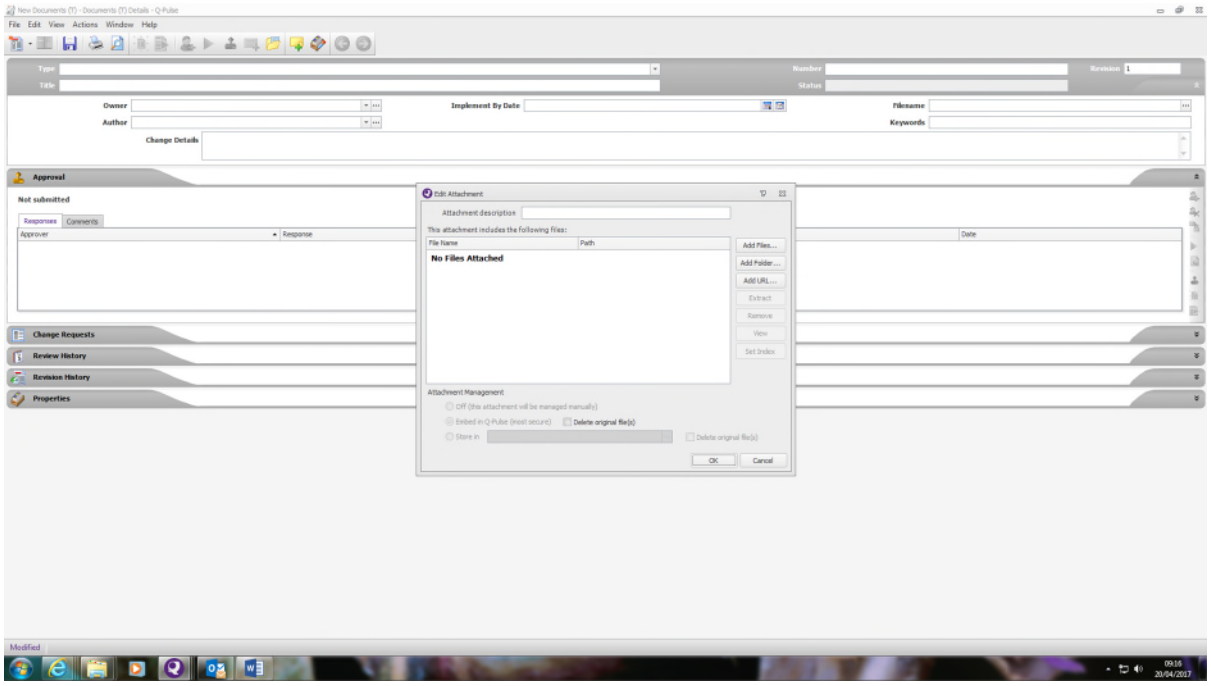


This creates a new document record:

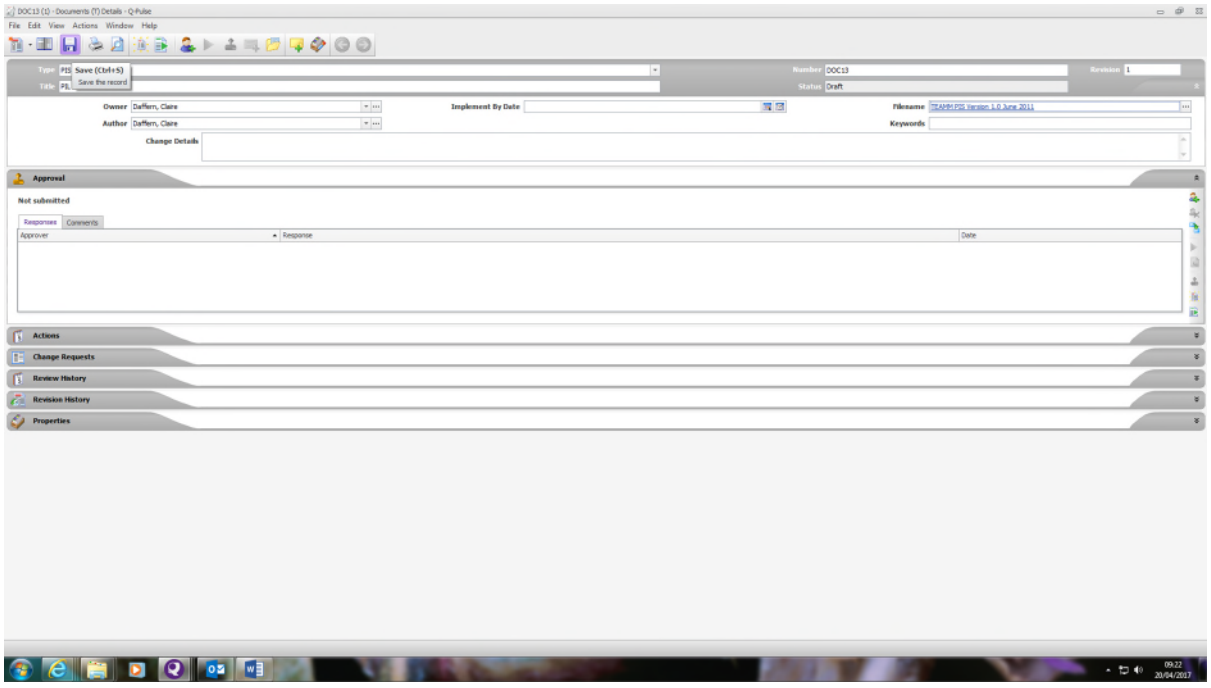


Insert details:
Type: from the drop down list, drill down to select the document type from the relevant trial list.

Insert Title, revision number (should be v1.0 in most cases), owner (usually the TC) then upload the document to be approved by clicking on the 3 dots in the Filename field.

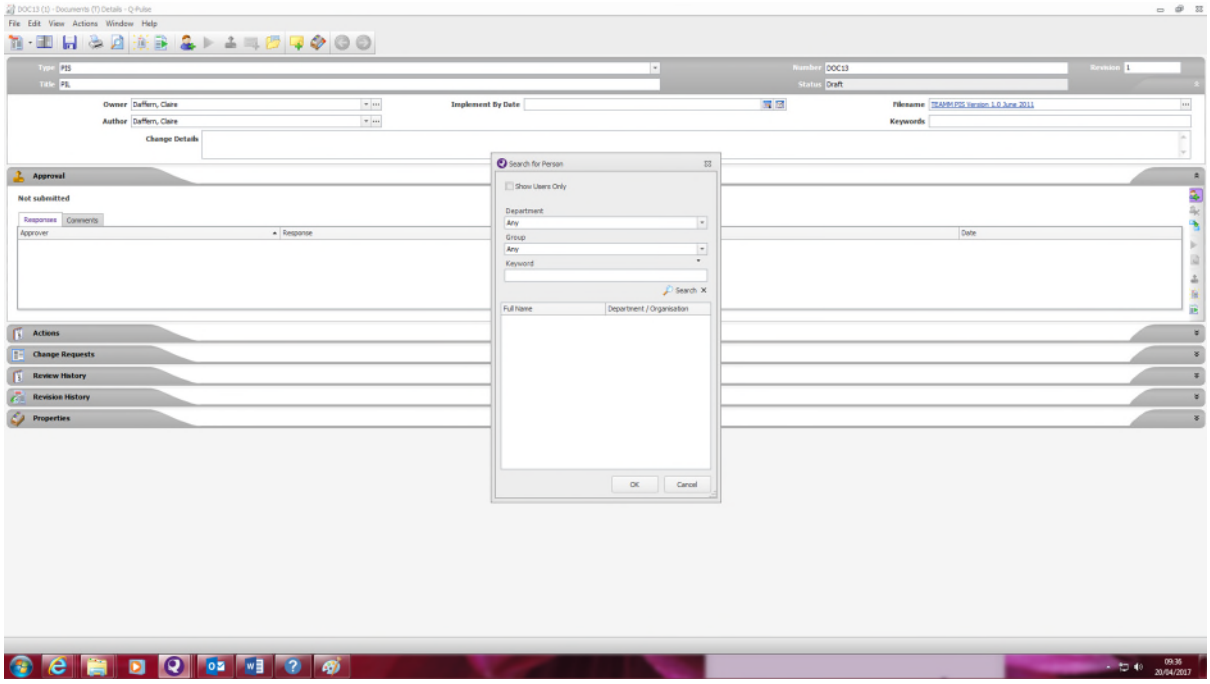


Click on 'Add Files' and browse to find the relevant document. Click 'OK' to upload. Click on 'Save'

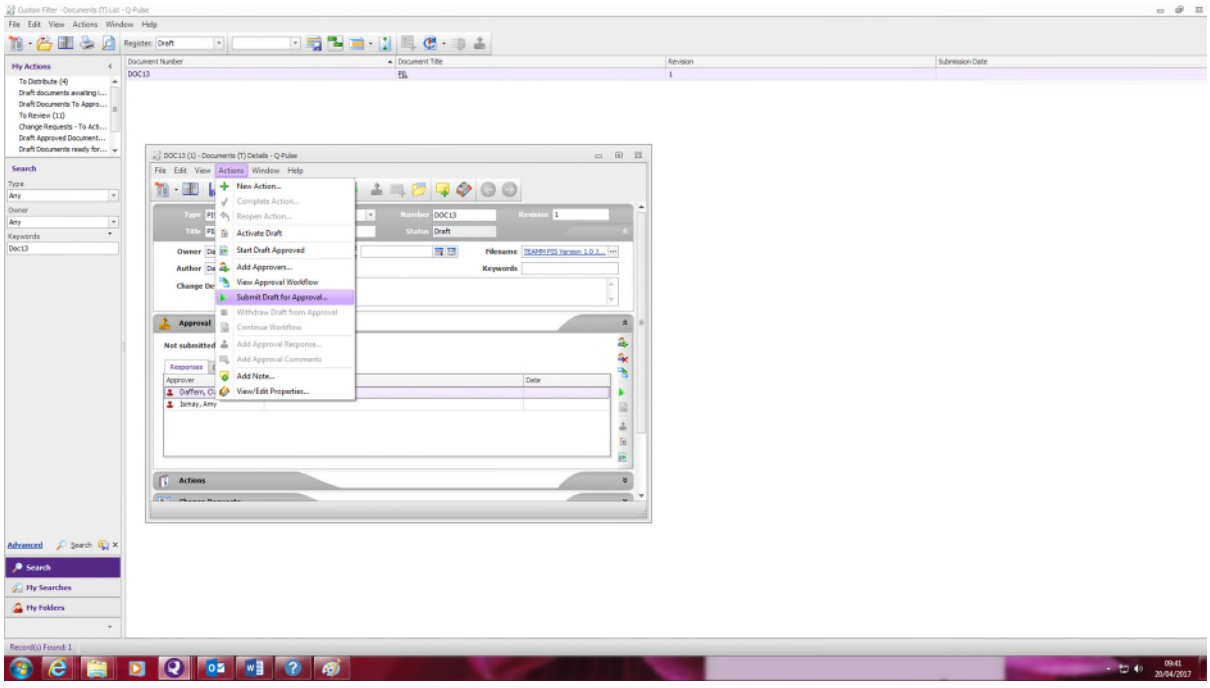


In the Approval section, click on the icon with the green cross (on the right hand side).

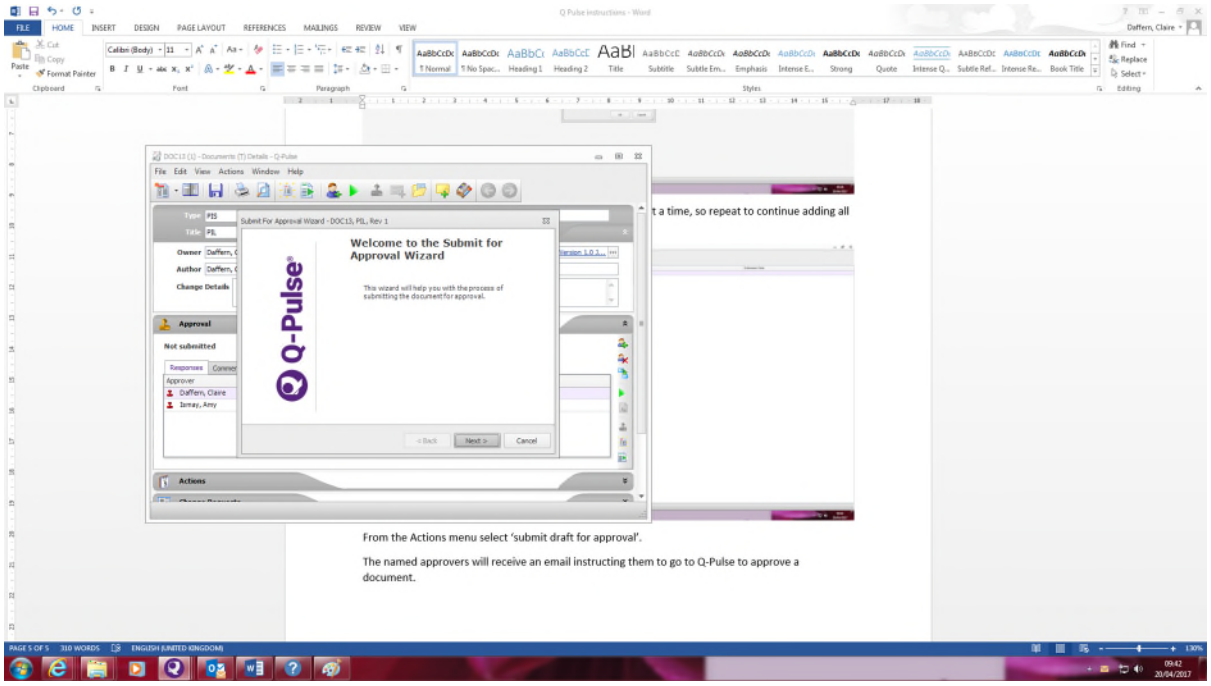
The 'search for person' box appears:



Add name of approver and click OK. You can only add one at a time, so repeat to continue adding all required approvers.



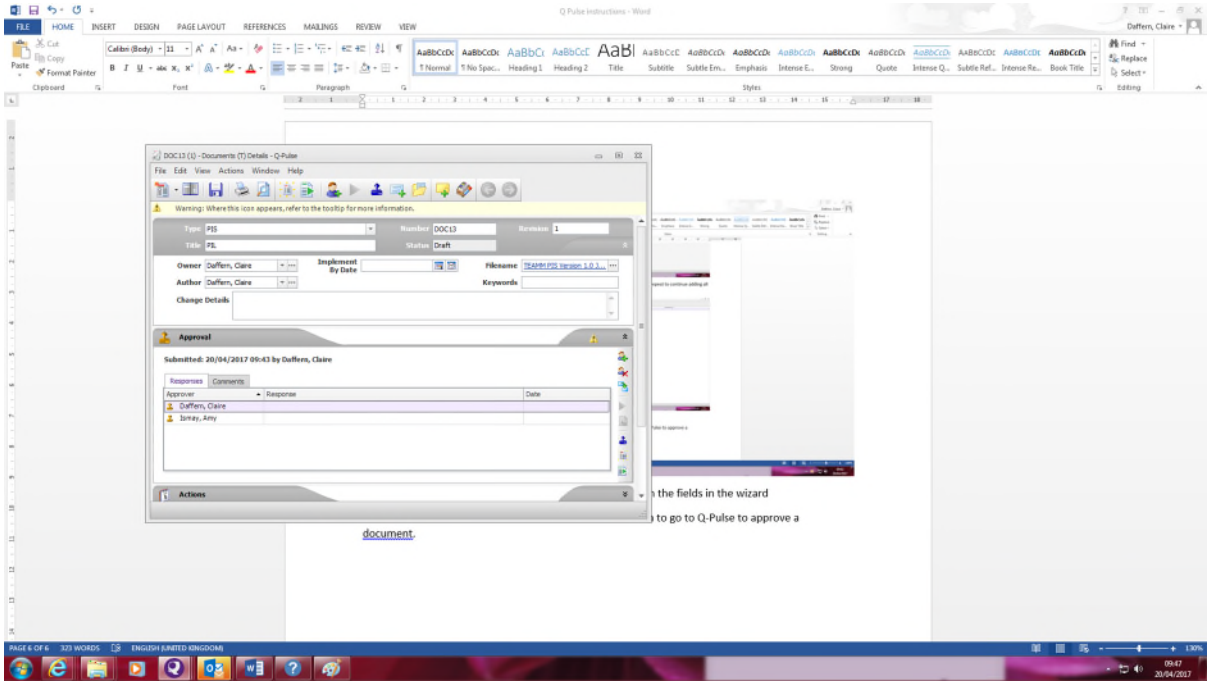
From the Actions menu select ‘submit draft for approval’.



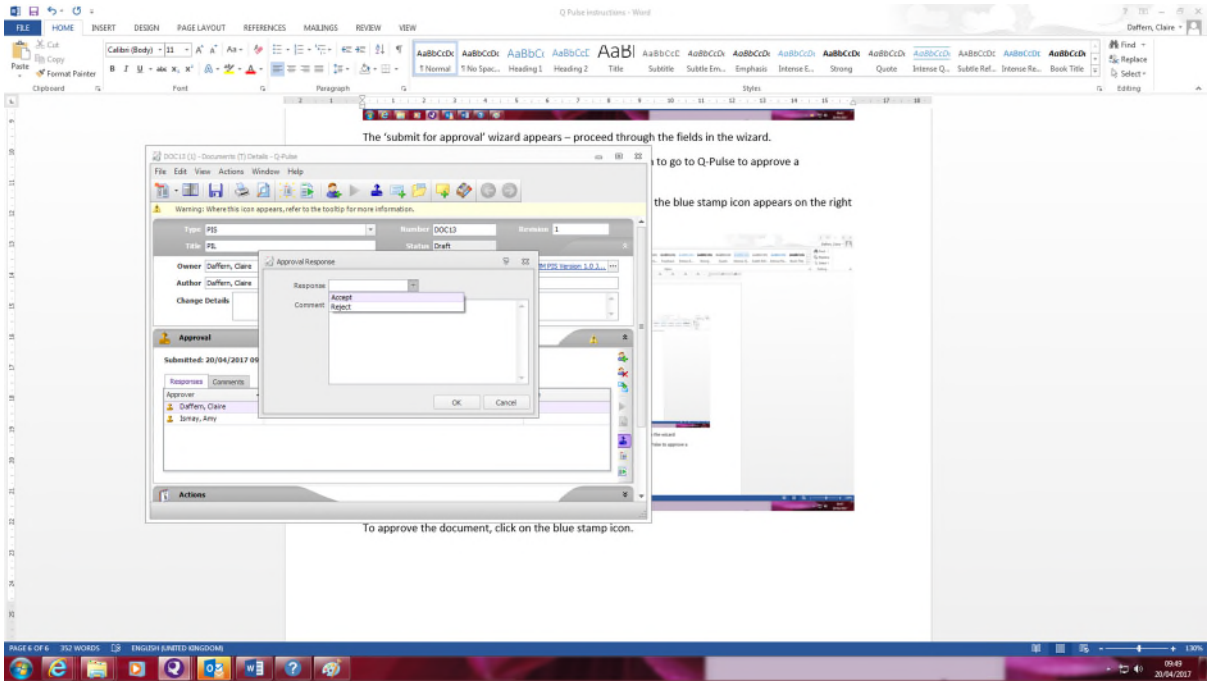
The 'submit for approval' wizard appears – proceed through the fields in the wizard.

The named approvers will receive an email instructing them to go to Q-Pulse to approve the document.

To approve the document, open the document record and the approval section (a yellow warning triangle indicating an action is required will be visible).

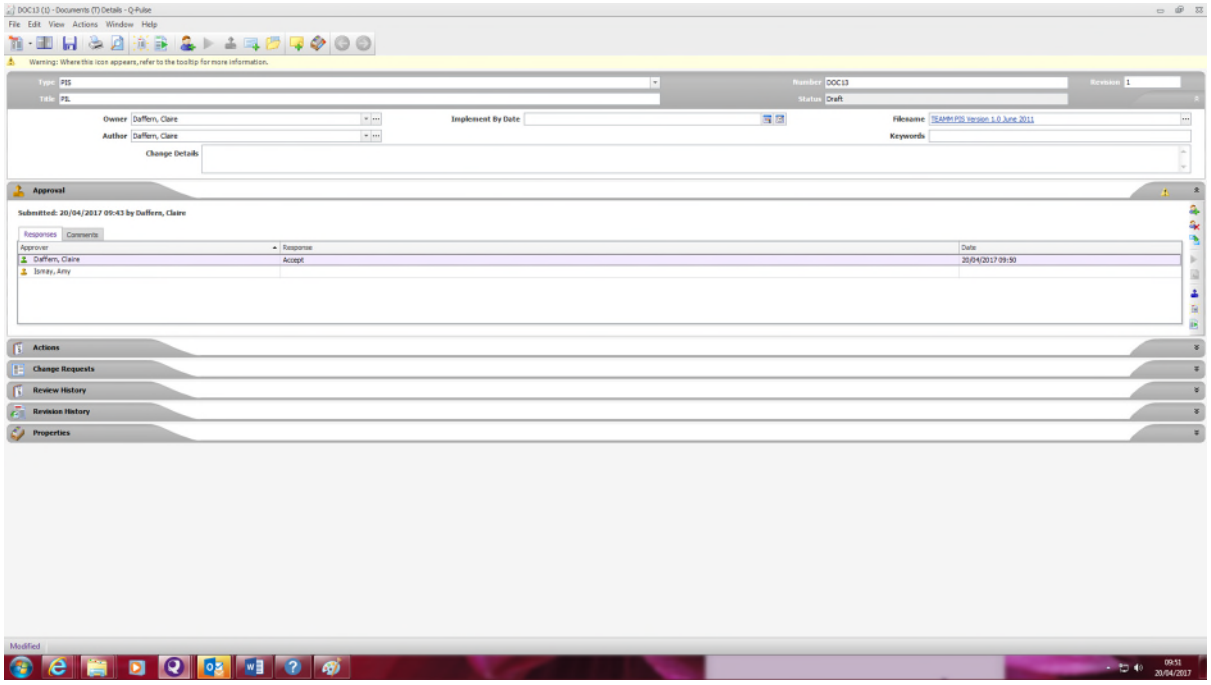


To approve the document, highlight your name and click on the blue stamp icon (on the right hand side).

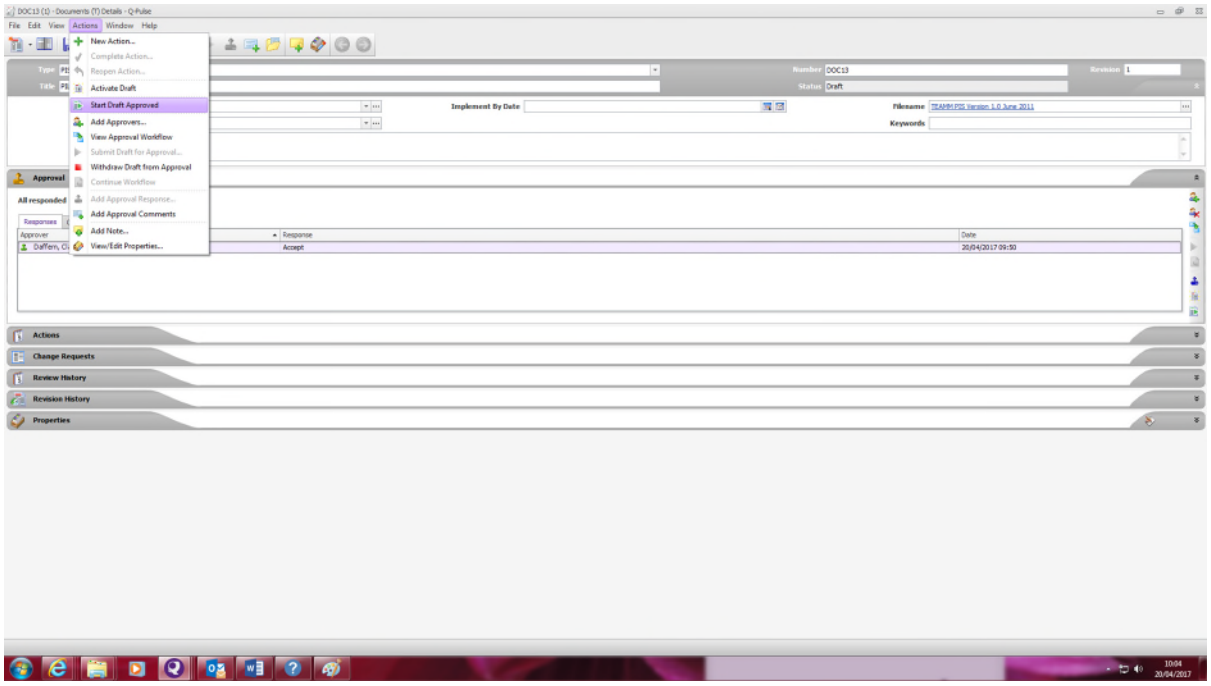


The approval response box appears. Click on 'accept' and OK followed by 'save'. A signature box pops up – insert your Q-Pulse user name and password to complete the electronic signature.

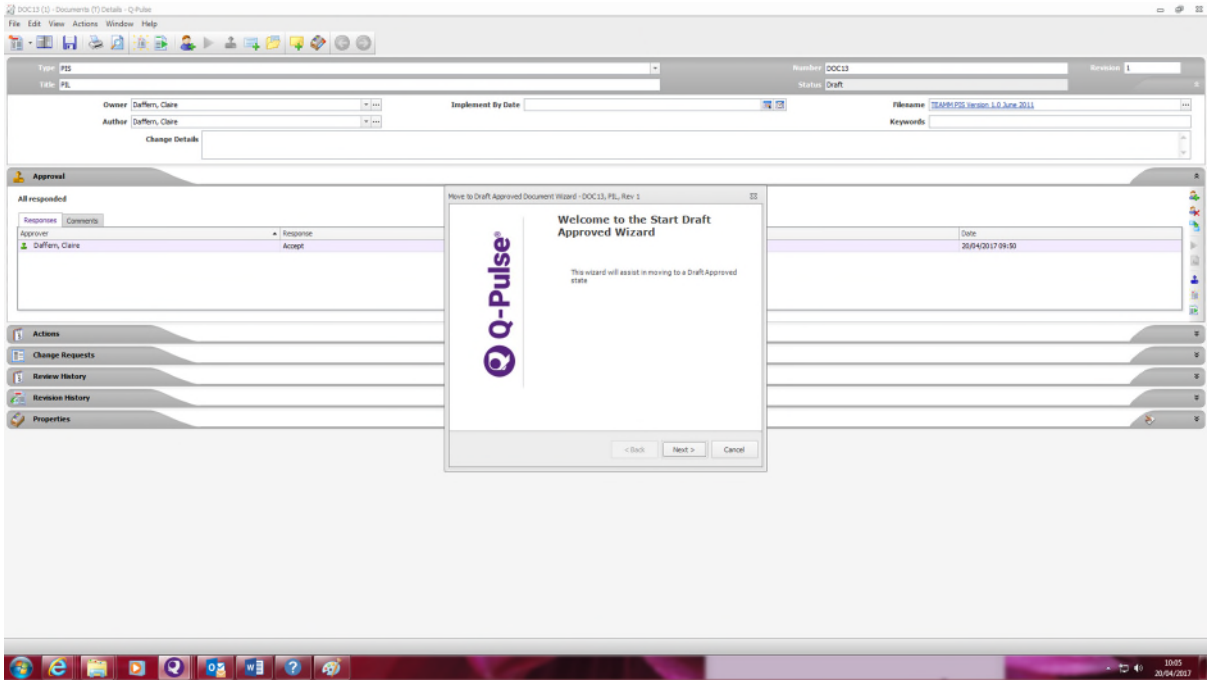
The icon next to the approvers name will turn from orange to green and the date and time of approval will be inserted into the record.



Once all approvals have been completed, go to the Actions menu and select 'start draft approved'

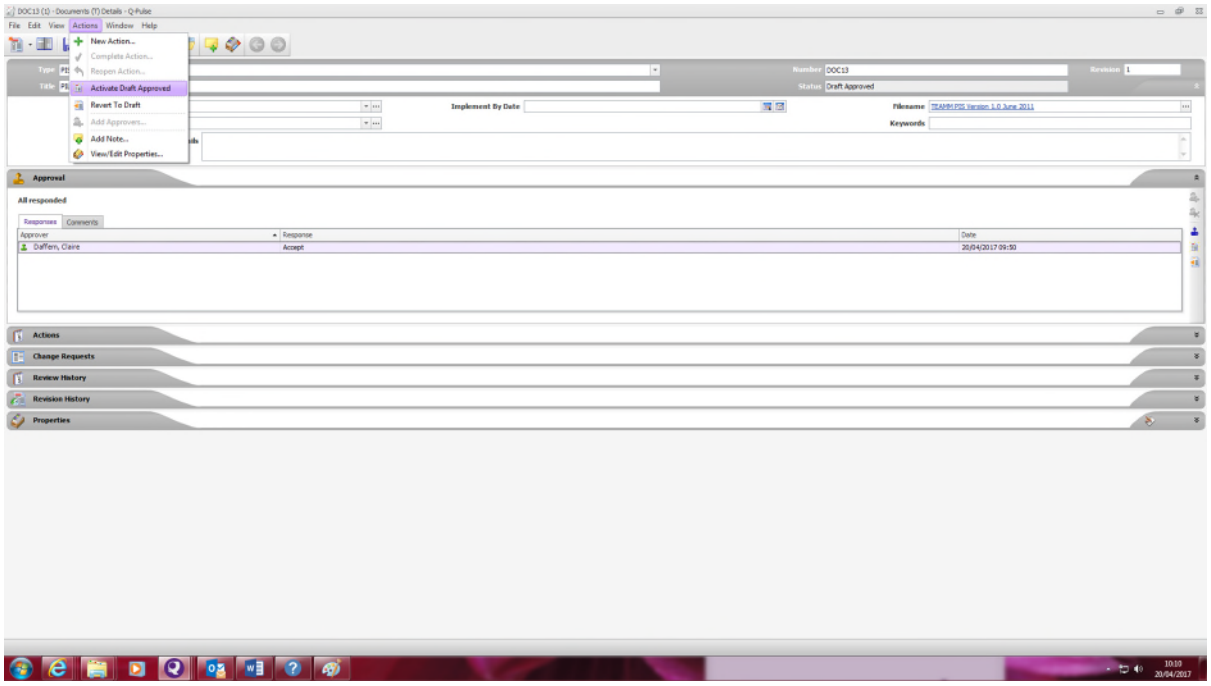


The 'start draft approved' wizard appears:

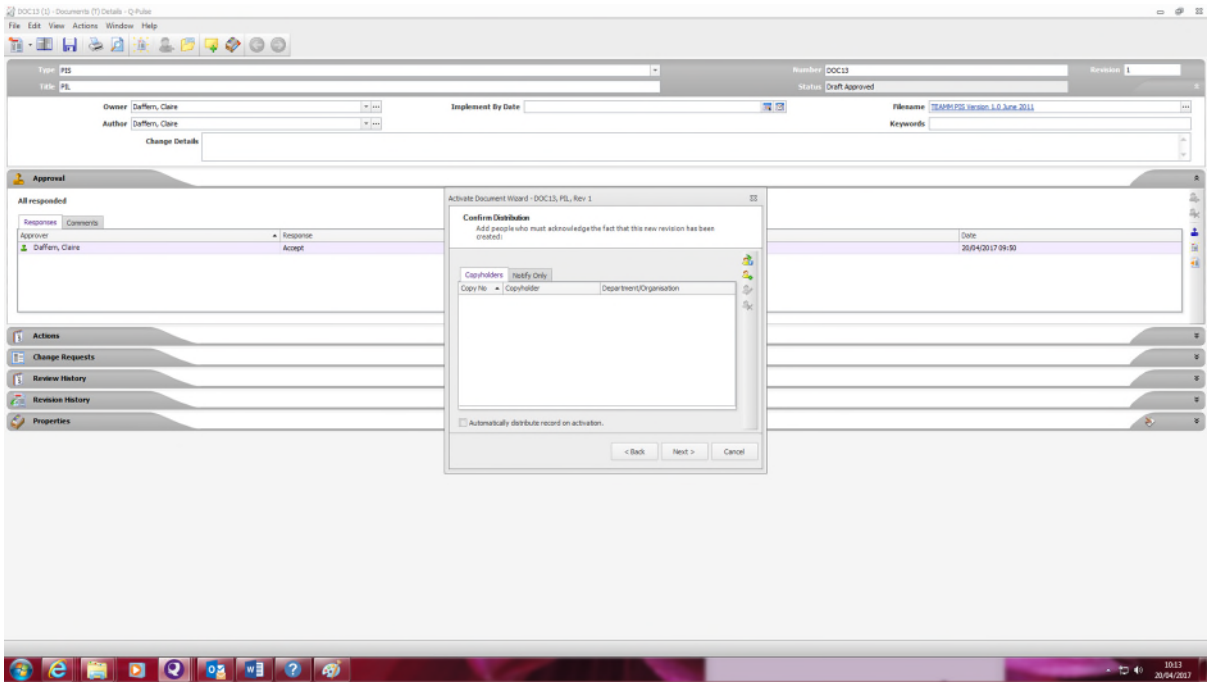


Proceed through the steps in the wizard (convert document to PDF).

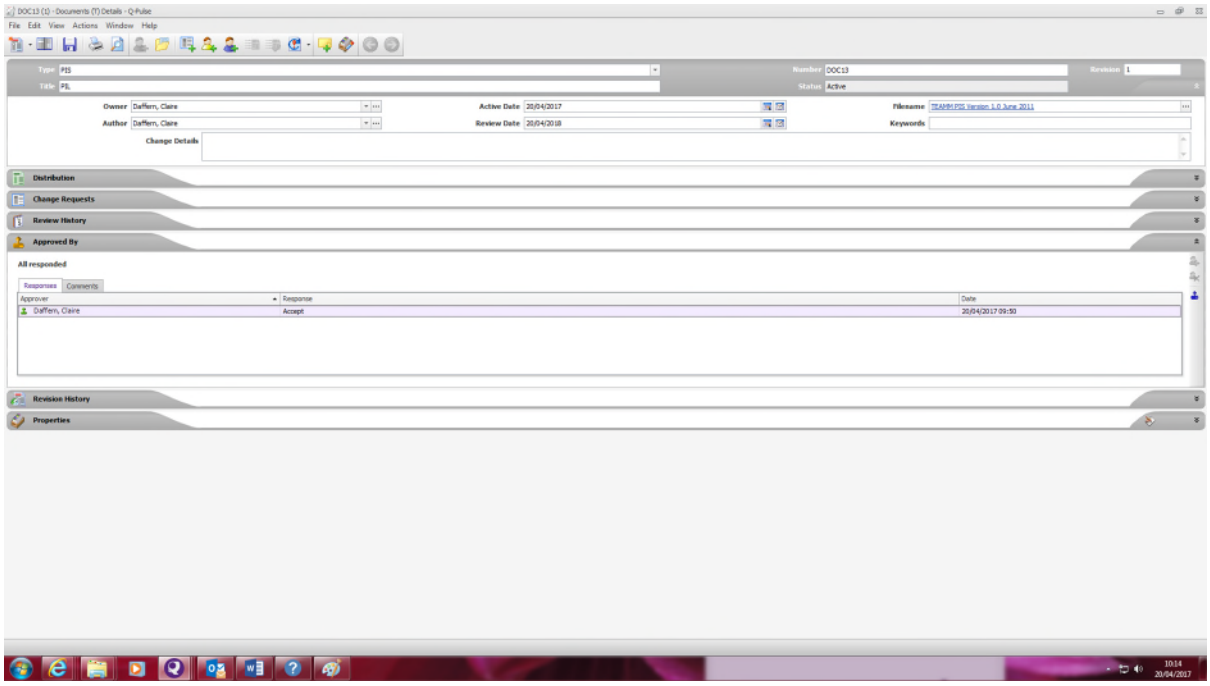
To finalise and convert this to an 'active' document, select 'activate draft approved' from the Actions menu



If the document needs to be distributed to staff as copyholders (to acknowledge and confirm they have read the document – this usually only applies to SOPs, but you may wish all team members to confirm they have read a new version of any document) add names into the distribution list – skip if not required.



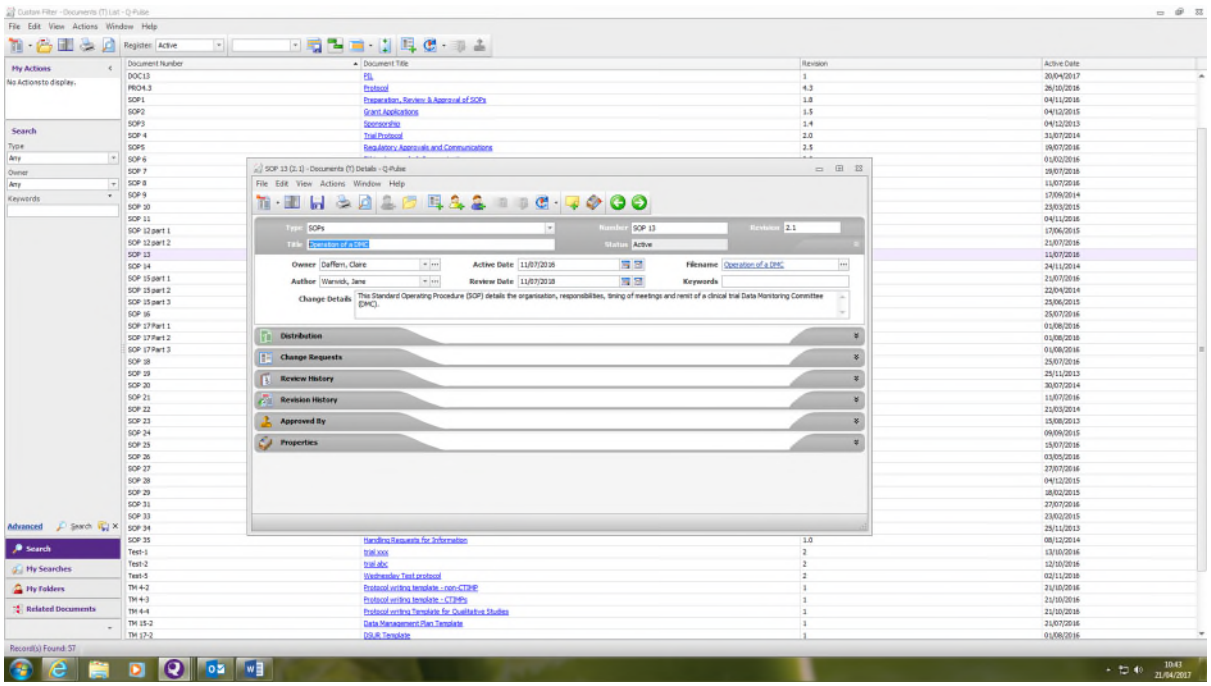
Completion of the steps in the wizard will convert the document from draft to active status and the document will be visible in the active document register.


DOC13 (1) - Documents (T) Details - Q-Pulse
File Edit View Actions Window Help
Type: PIS
Title: PIL
Number: DOC13
Status: Active
Revision: 1
Owner: Daffern, Claire
Author: Daffern, Claire
Active Date: 20/04/2017
Review Date: 20/04/2018
Filename: TEAMM PIS Version 1.0 June 2011
Keywords:
Change Details:
Distribution
Change Requests
Review History
Approved By
All responded
Responses
Comments
Approver
Response
Date
Daffern, Claire
Accept
20/04/2017 09:50
Revision History
Properties
1014
20/04/2017

Creating and approving a new version of a current active (approved) document

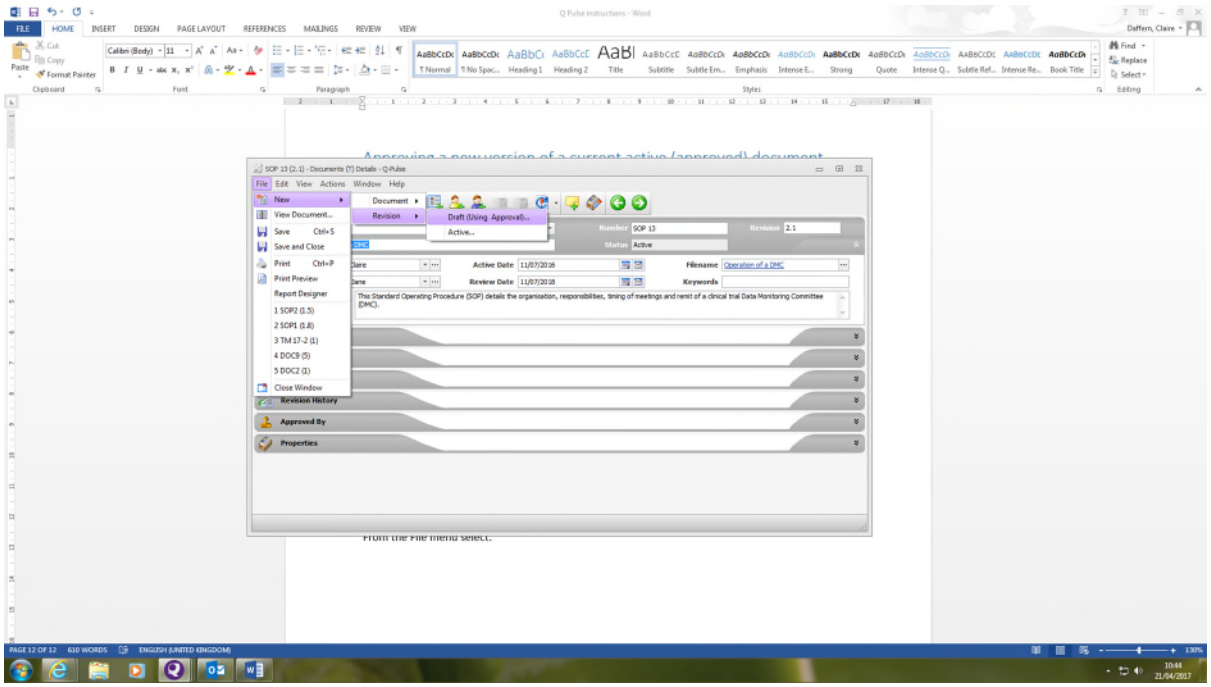
In the documents module, locate the current approved document in the active register.

You can search via the panel on the left hand side by either document type, document owner or by inserting keywords.

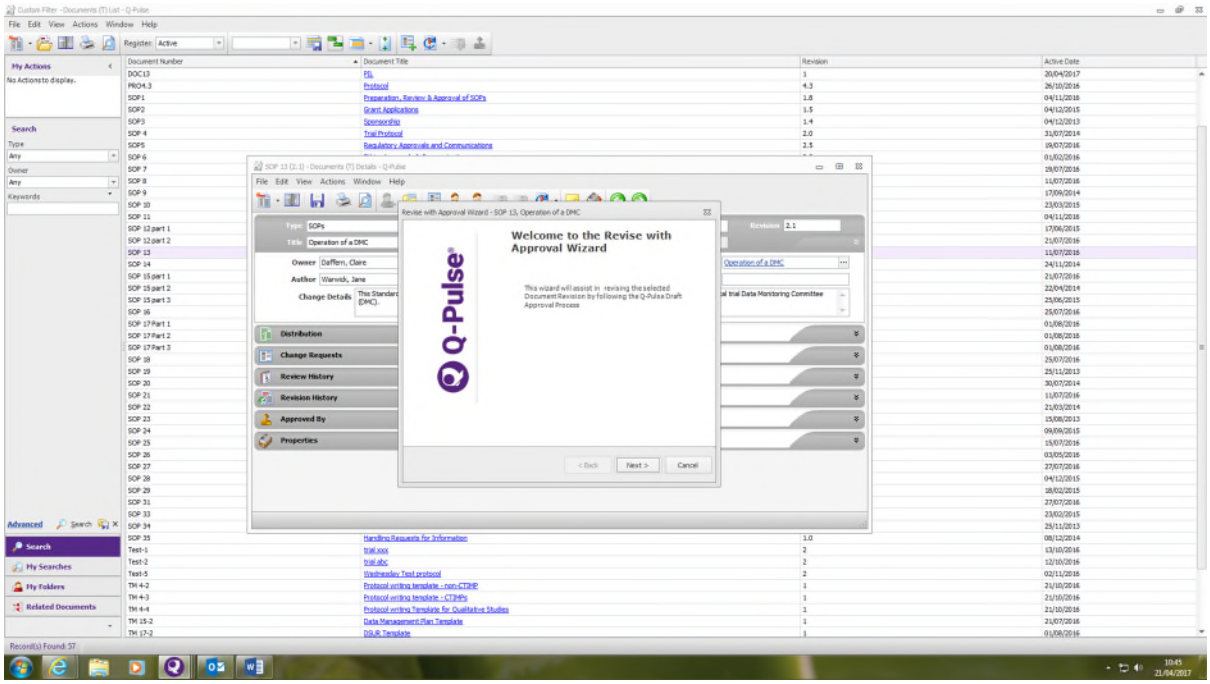


Open the document record form.

From the File menu select: New – revision – Draft (using approval)

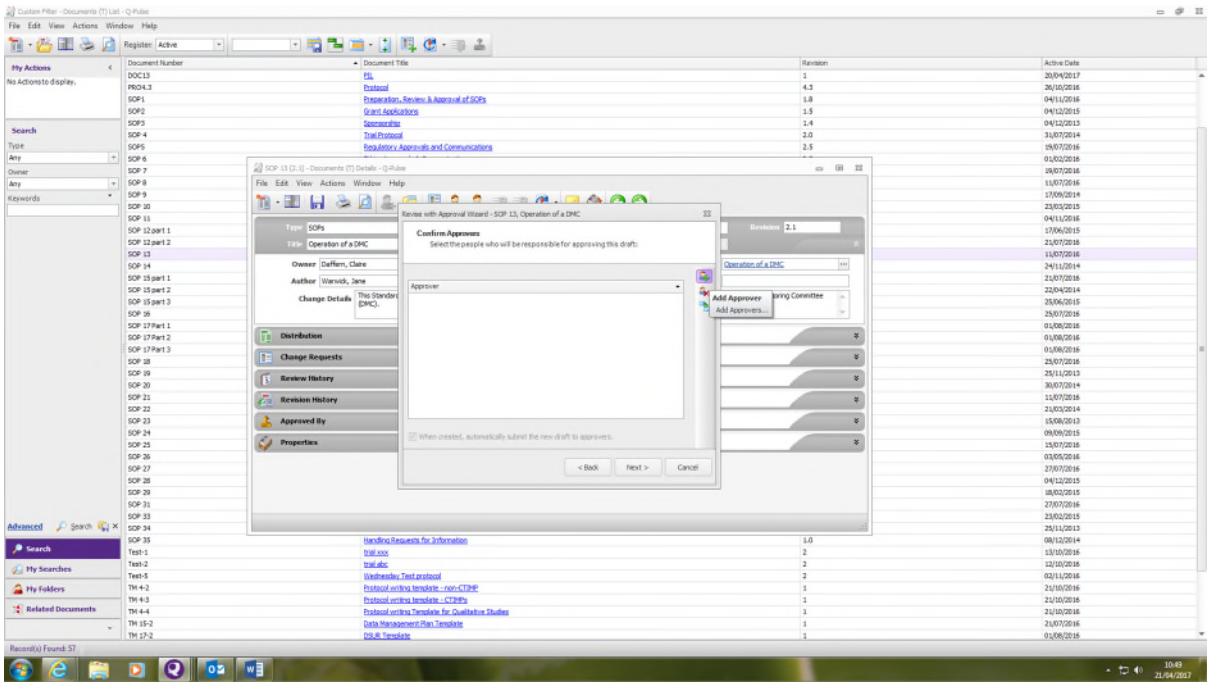


This opens the ‘revise with approval’ wizard:

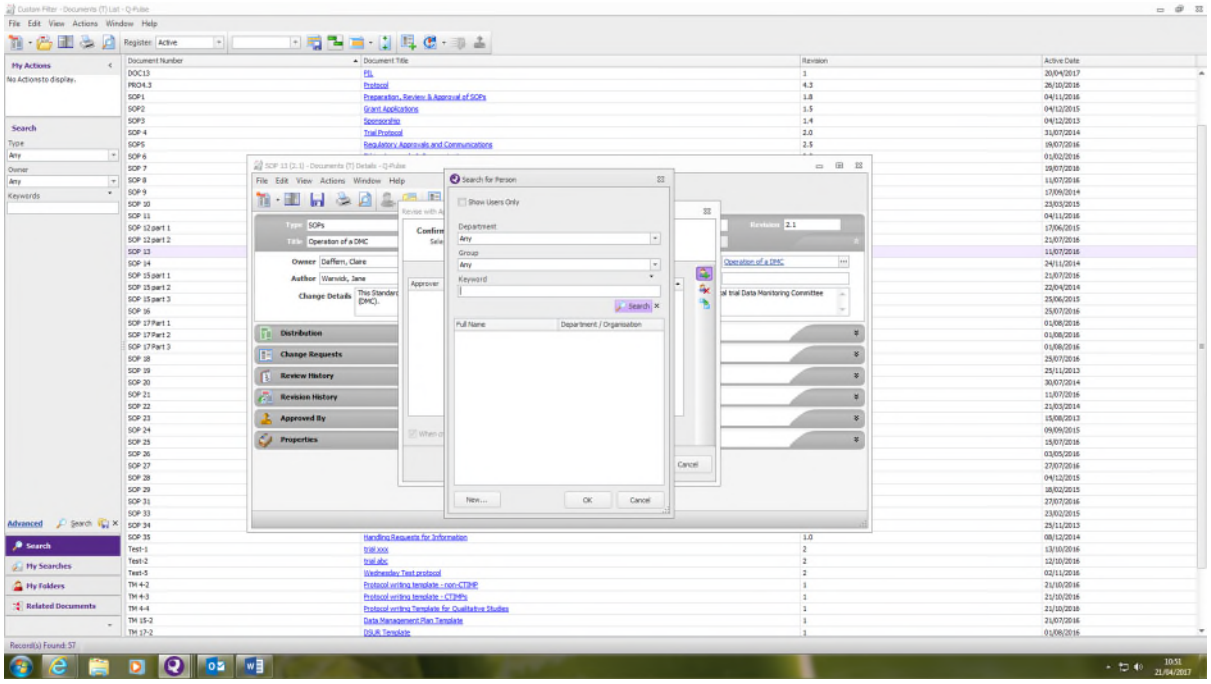


Proceed through the wizard. The system will allocate the next revision number (e.g. current version 2.1 will show as 2.2 in the wizard – but this number can be manually altered if for example the changes in the document are large and therefore the version is updated to v3.0).

Add names of approvers:

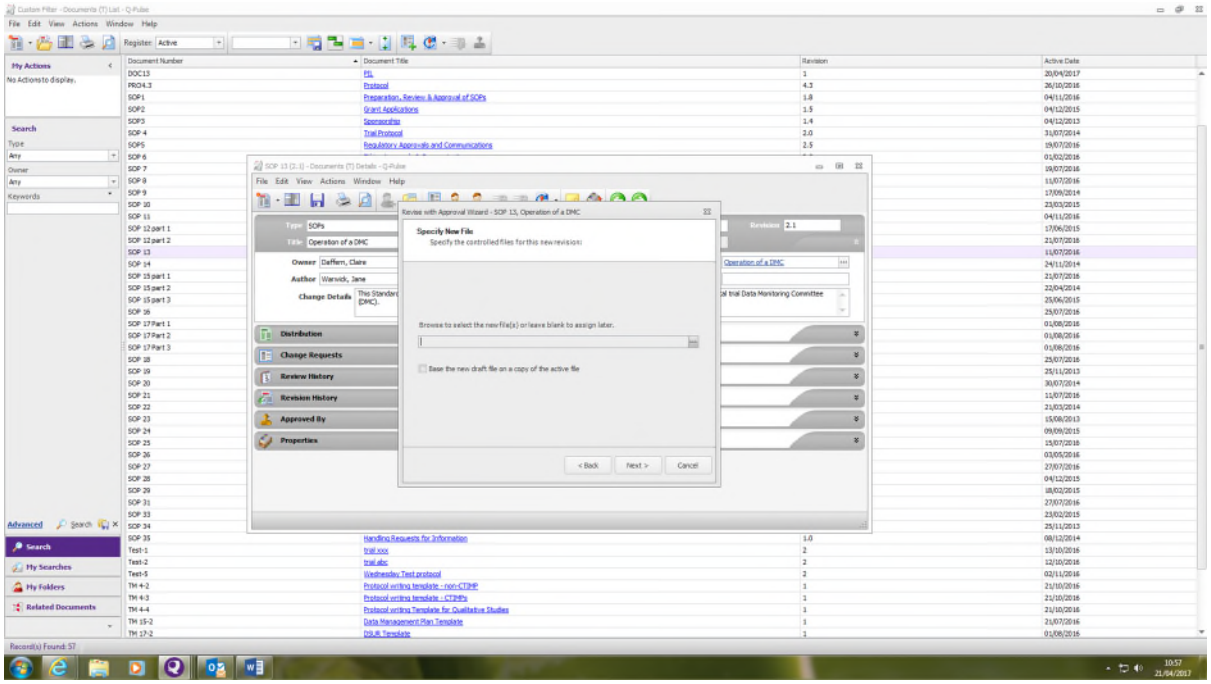


Click on the ‘add approver’ icon and the ‘search for person’ box appears:



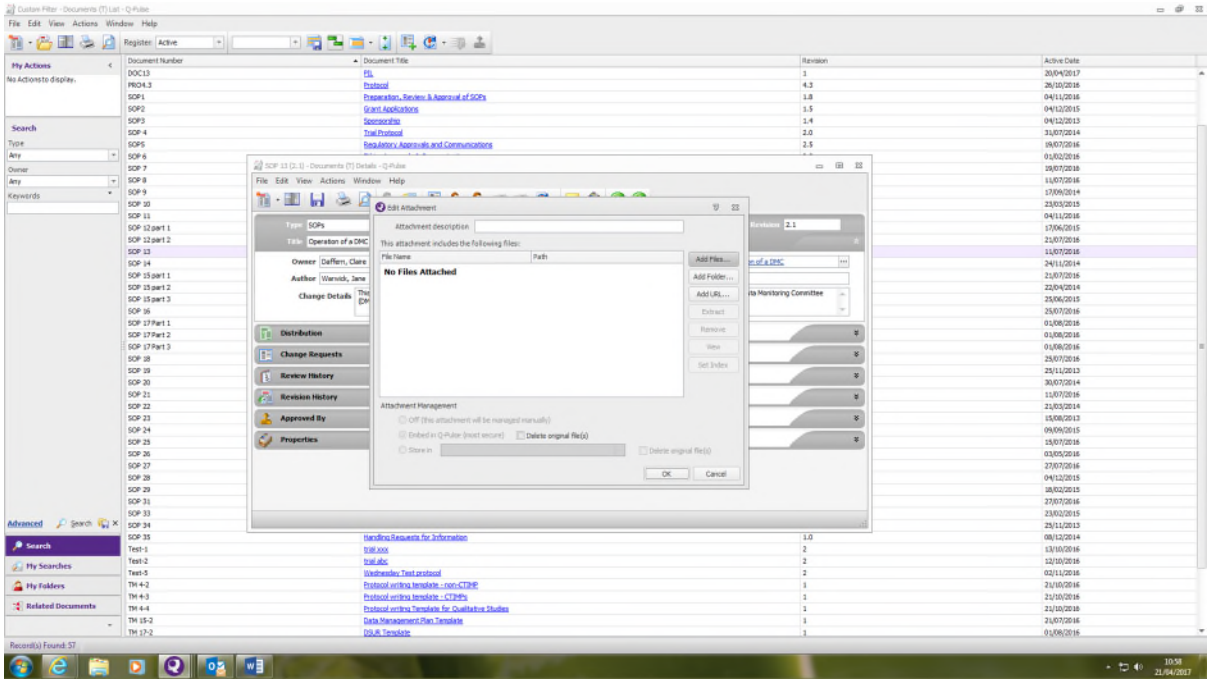
Add details of all required approvers and ensure the box is ticked alongside the statement: 'When created, automatically submit the new draft to approvers'. The system will send each approver an email informing them they have a document to approve.

In the next wizard field, upload the new document version:

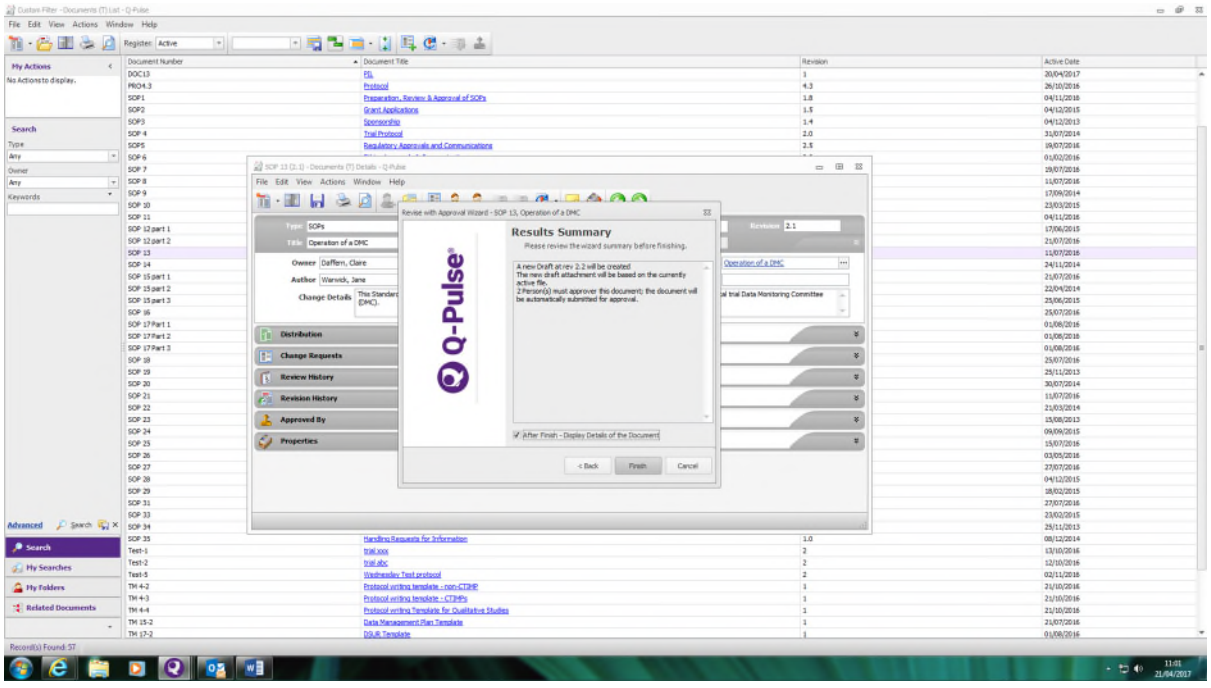


Click on the 3 dots to browse your computer and locate the required document.

Click on 'add files'

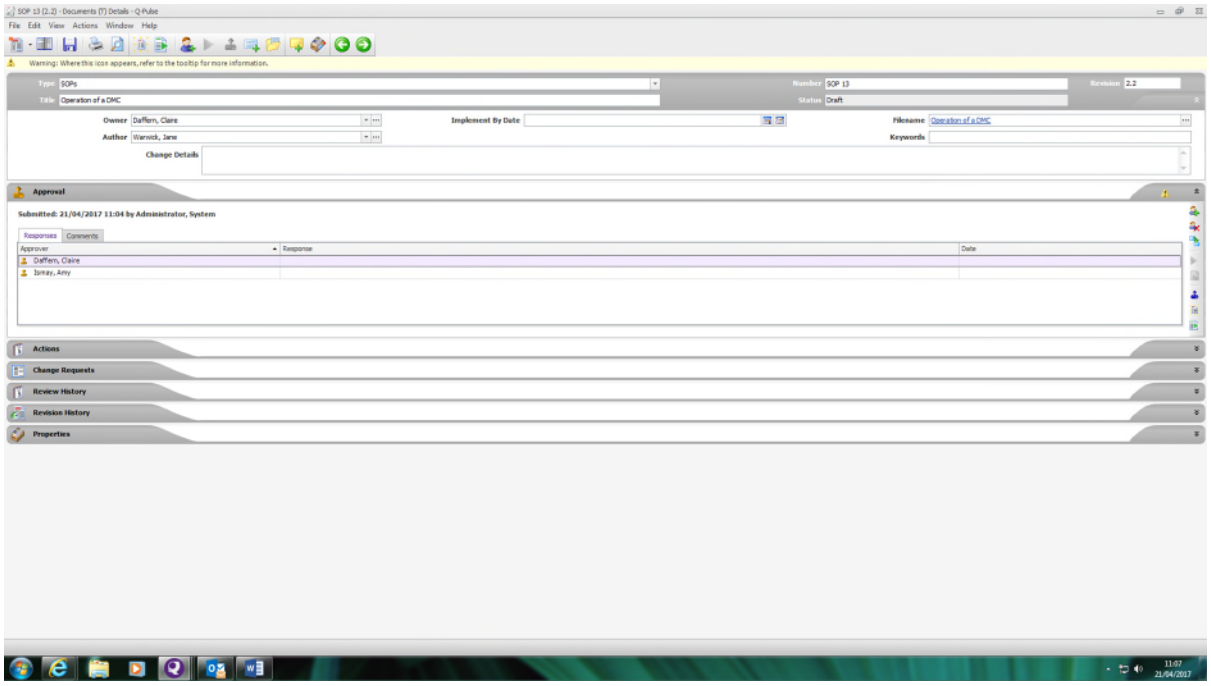


Proceed through the wizard, check the results summary on the final page which confirms the new version number and how many people are required to approve the document. Click ‘Finish’.

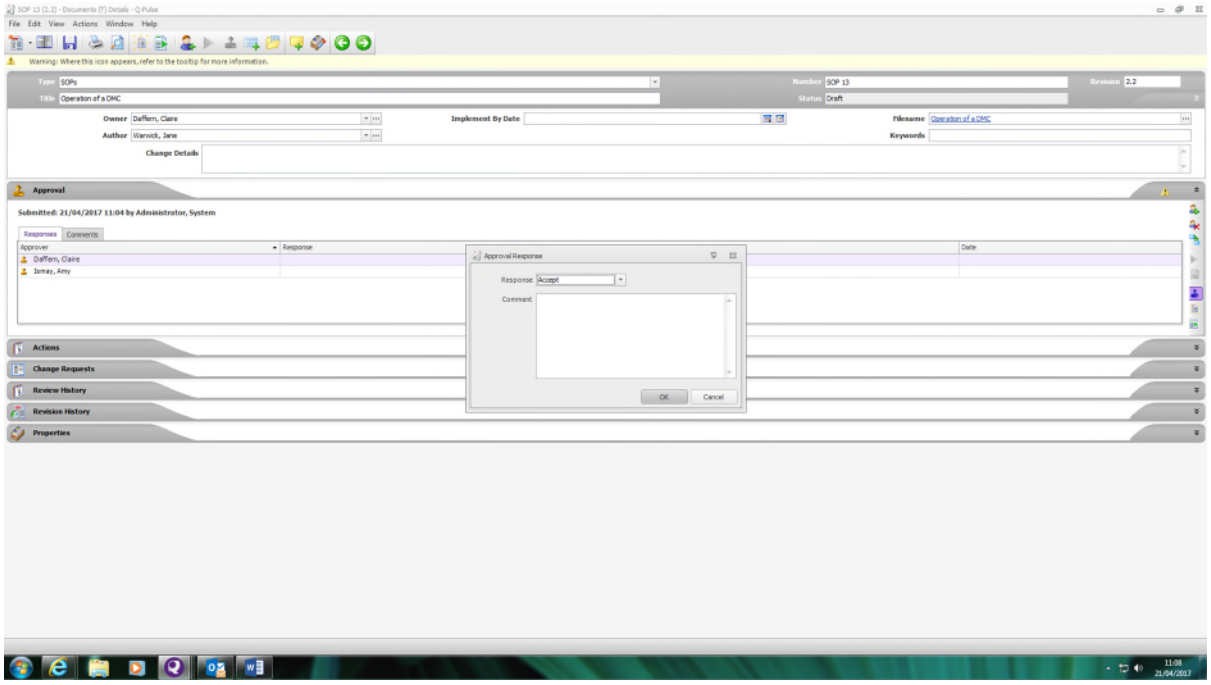


On receipt of the email request, the approvers should open the document record. The Approval section will show a yellow triangle – this indicates a task is required.

To approve the document, highlight your name and click on the blue stamp icon

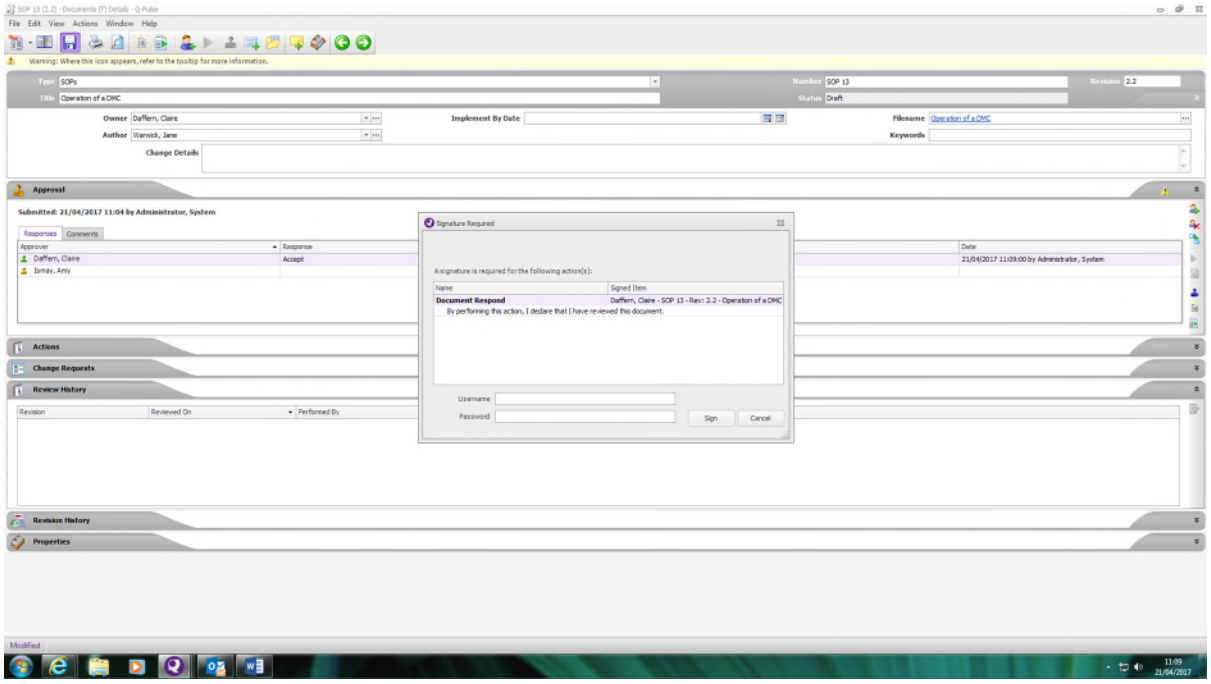


The 'Approval Response' box appears – select Accept and OK

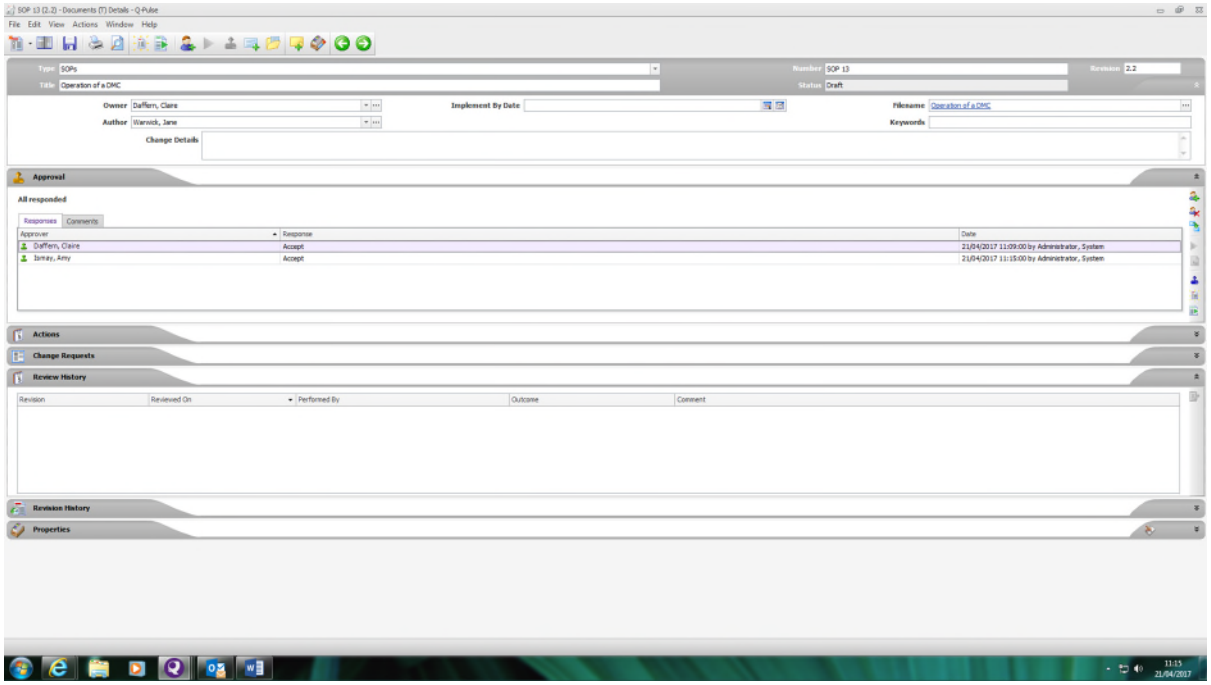


Save the record (Ctrl+S or click on save icon)

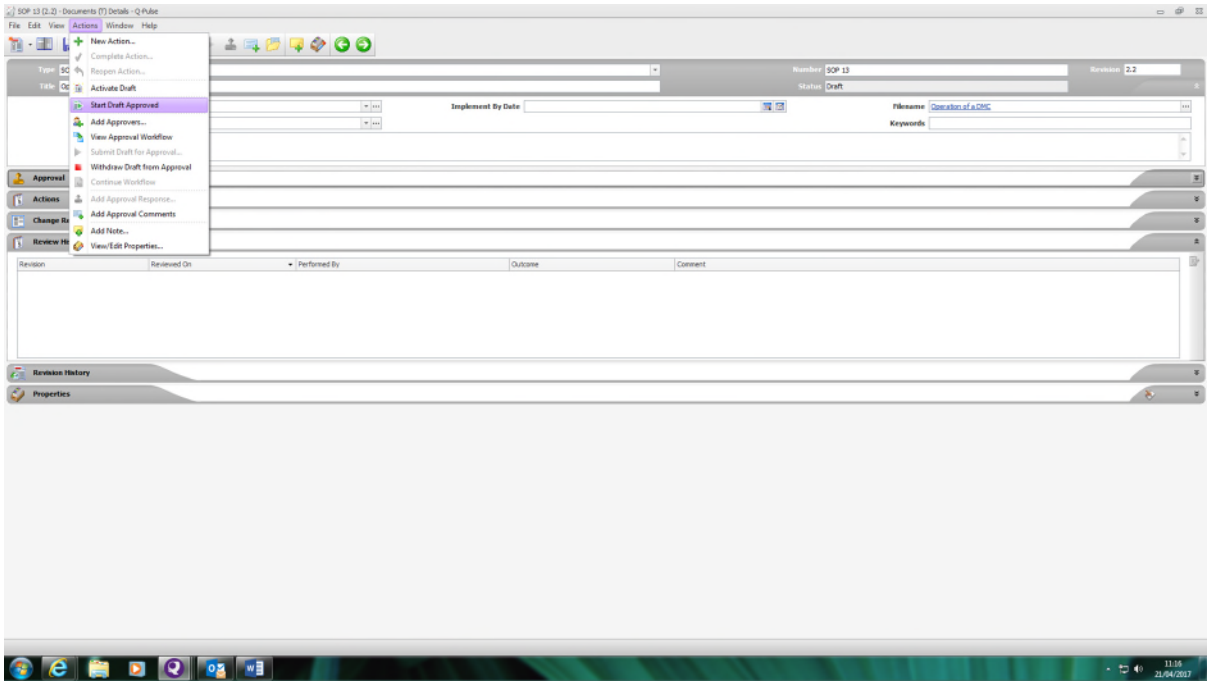
The 'signature required' box appears – insert your username and password – this inserts your electronic signature – and click Sign



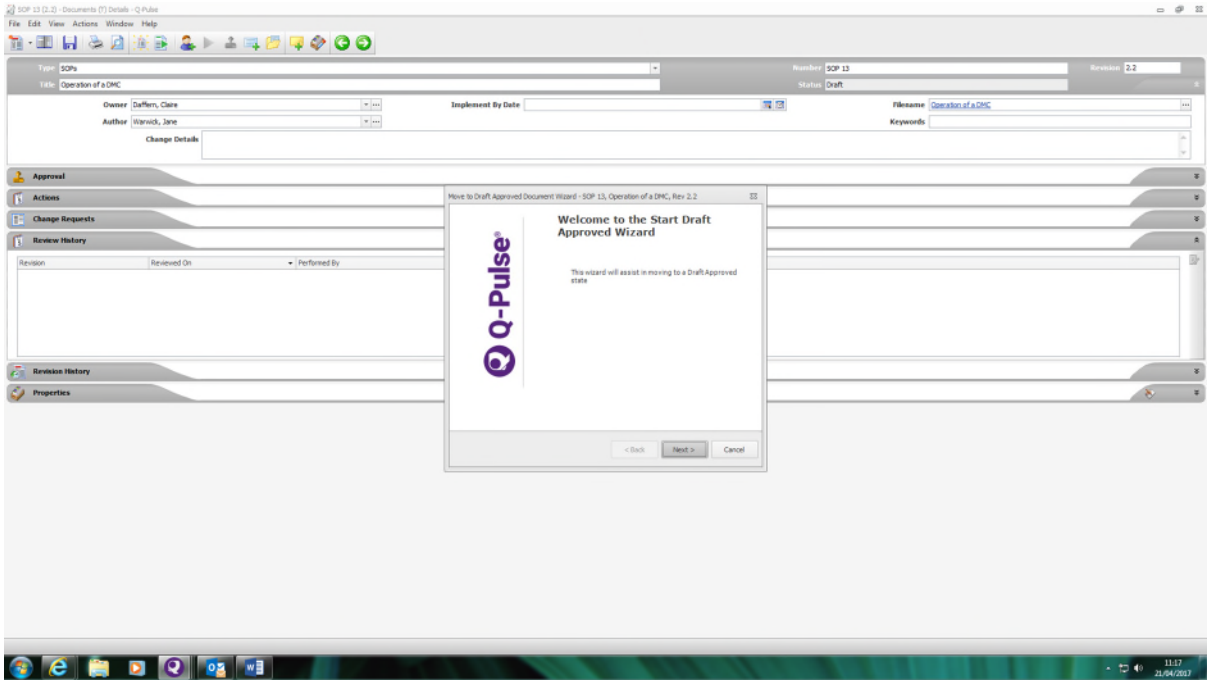
The date and time of the addition of the approvers' signature is added and the icon alongside the approvers name changes from orange to green to indicate the action is complete.



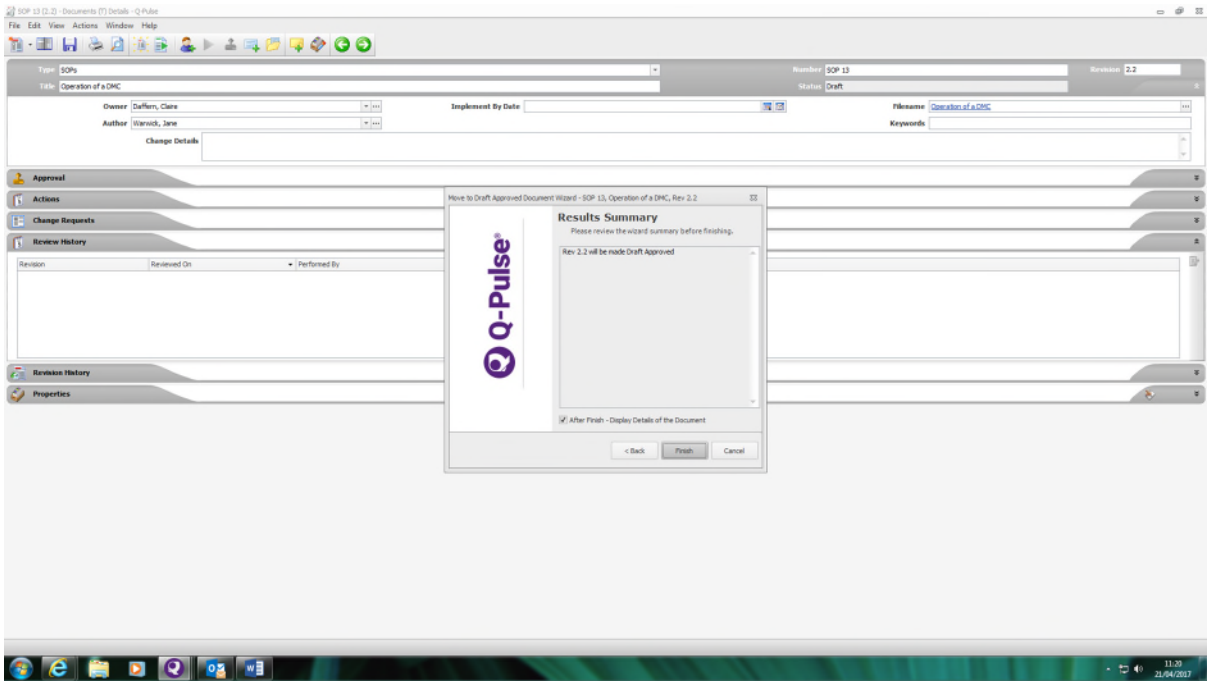
When all approvals have been entered, go to the Actions menu and select 'Start Draft Approved' option:



This opens the 'Start Draft Approved' wizard



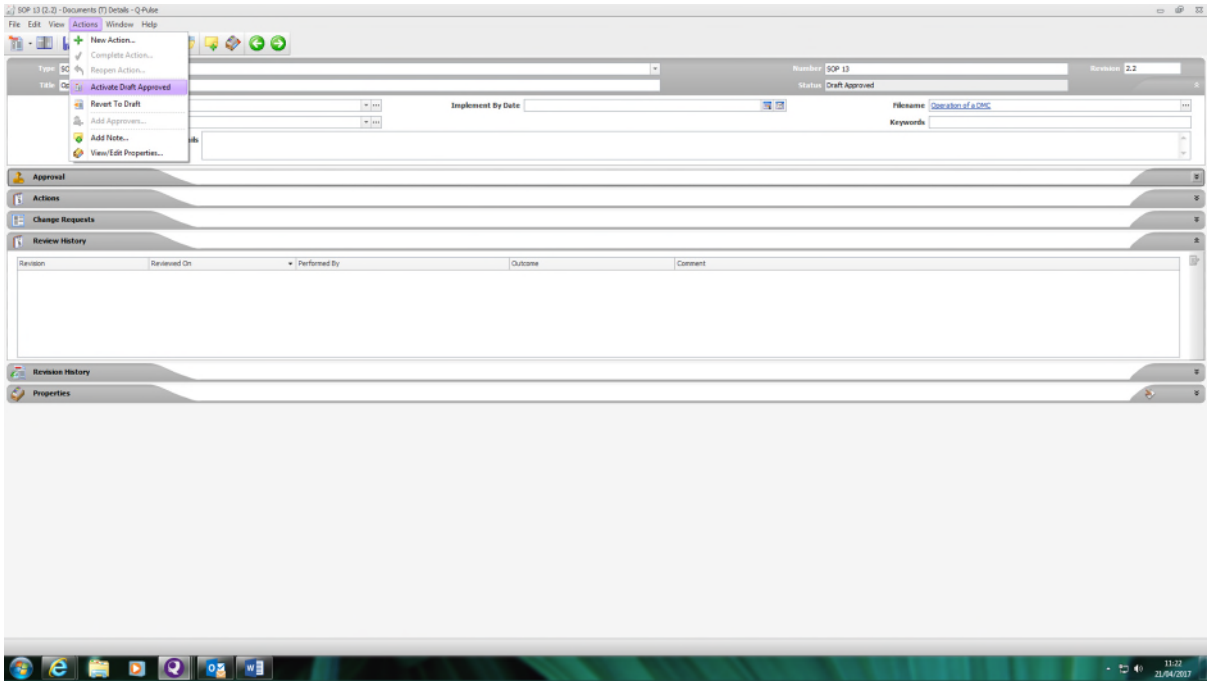
Proceed through the wizard



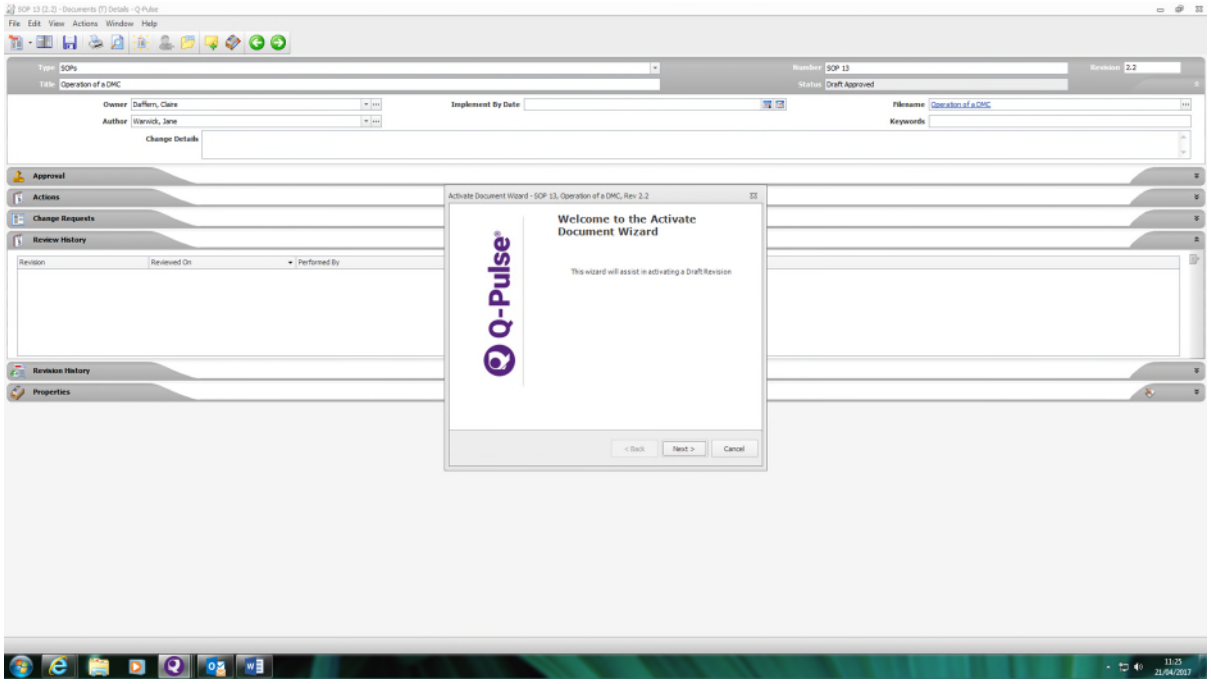
Completion of the wizard converts the document to the new version.

Click Save – the status of the document will be changed to show: draft approved status.

From the Actions menu, select 'Activate Draft Approved':



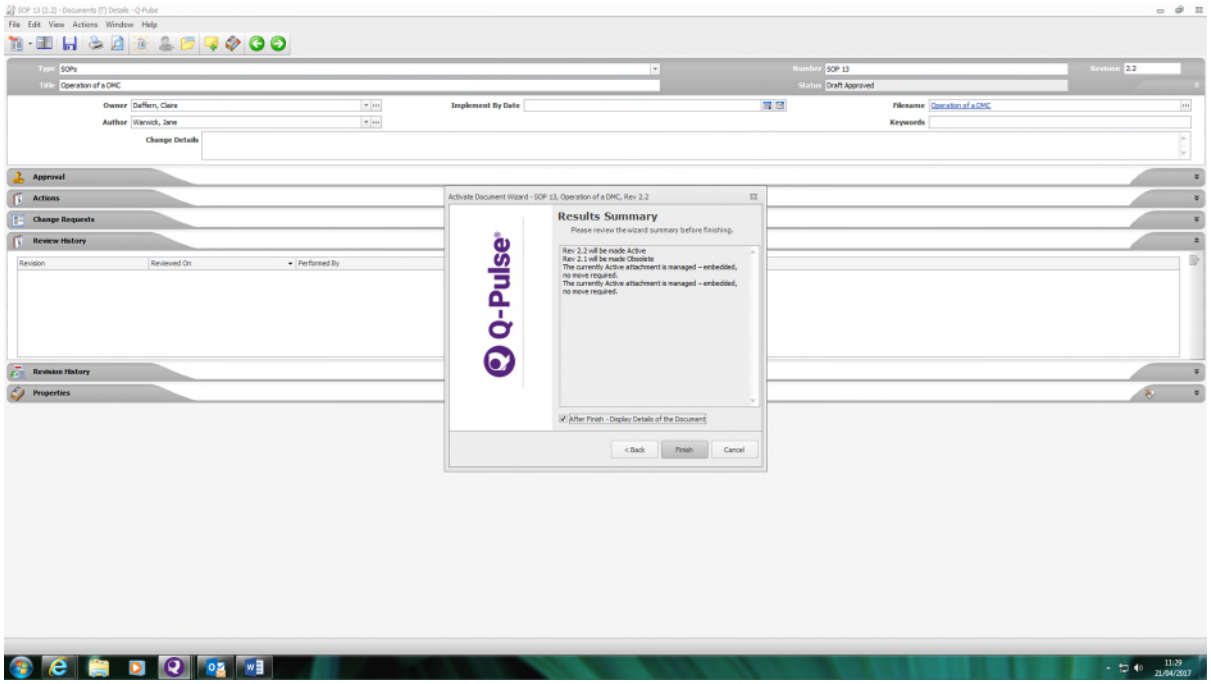
The 'Activate Document' wizard appears:



Proceed through the wizard, the status of the previous version will be changed to 'obsolete' (the previous active versions will still be held in the system in the obsolete register).

Add copyholders names to distribute the document if acknowledgement of reading and understanding the new version is required (skip if not required). The system will send copyholders an email to inform them they have a document to read/acknowledge.

At the end of the wizard, the results summary will be shown. This confirms that the previous version will be made obsolete and the new version will be made active:



Click on 'Finish' and the document status is now shown as Active.