Approving a Document

Web Version

Similar to the process above, when accessing Q-Pulse from the webclient you will see the action has been assigned to you. This will appear under the "Workload" tab which can be selected on the left. From the available list of actions, select the "Awaiting Approval" action to show the documents awaiting approval.

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Dashboards					
Workload	Loo	k ahead to			
My Searches	N	ext Week	*		
Documents		Module † 🍸	Title Y	Actions 1 Y	
Documents	•	Audit and Moni	Audits to Close	To Close (9)	
Change Requests	•	Audit and Moni	Audits To Perform	To Perform (34)	
Occurrences	•	CA/PA	Non-Conformances	Overdue (13)	
Incidents	•	CA/PA	Stages	Stages Overdue (8)	
ion 7.1.7.0	•	Documents	Documents with new Change Requests	Change Requests - To Action (2)	
vright 2023 Ideagen PLC		Documents	Draft Documents to Activate	Draft Documents To Activate (3)	
		Documents	Awaiting Approval	Draft Documents To Approve (1)	
		Documents	Distribution Acknowledgements	To Acknowledge (1)	
	•	Documents	Document review	To Review (14)	
			Page 1 of 1 (9 items)	Page size: 20 🔻	

This will open a list of documents which require your approval, each can be opened by clicking on it.

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Documents	•	Audit and Moni	Audits to Close	To Close (9)	
Change Requests	•	Audit and Moni	Audits To Perform	To Perform (34)	
Occurrences	•	CA/PA	Non-Conformances	Overdue (13)	
Incidents	•	CA/PA	Stages	Stages Overdue (8)	
/ersion 7.1.7.0	•	Documents	Documents with new Change Requests	Change Requests - To Action (2)	
Copyright 2023 Ideagen PLC	Þ	Documents	Draft Documents to Activate	Draft Documents To Activate (3)	
	-	Documents	Awaiting Approval	Draft Documents To Approve (1)	
		Number 1 01.1	Title test	Y Target Date ↑ Y	
			Page 1 of 1 (1 items)	Page size: 20 🔫	
	Þ	Documents	Distribution Acknowledgements	To Acknowledge (1)	
	Þ	Documents	Document review	To Review (14)	
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When the document record is opened, click on the "Approvals" tab to access your approval. Beside your name on the left, you will see a tick. Click on this to open the approval window.

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Workload My Searches	A Warni informatio	ng: Where this icon appears, ref on	er to the tooltip for more			
Documents	Summany				(*	
Documents	Summary				Ū	
Change Requests	Number	Title	Status	Revision		
Occurrences	01.1	test	Draft	1		
Incidents	Type 01 GTCU General	Implement By Date	2			
	Document V	iewei 🔺 Approval C	hange Requests Review	Revision History	Properties	
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	Document V Responses Submitted:	ewe Approval C	hange Requests Review	Revision History	Properties	
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	Document V Responses Submitted:	iewei Approval C 18/12/2023 15:24 by Admin, PG Approver Y Res 2 Gribbon, Paul	hange Requests Review	Revision History	Properties	

From here you can then Accept or Reject and add comments, select OK to confirm your decision.

× Q-Pulse ° an ideagen product	Add Approval Response OK Cancel
Home *** tes Dashboards Workload	Response *
My Searches Documents	Accept
Documents	Reject

This will update the document record and present you with the Save option on the main document record. Press the green arrow to confirm your decision.

Q-Pulse® an ideagen product		Ny Account 🖓
Home ••• Dashboards	Document test	
Workload My Searches	Summary	(1)
Documents	Number Title Status R 01.1 test Draft	levision * 1
Documents Change Requests	Type * Implement By Date 01 GTCU General N 🔊 🔻	
Occurrences		
sion 7.1.7.0 pyright 2023 ideagen PLC	Responses	(*)
	All responded	0 👗 õ
	Approver Y Response Y Comment Y	Date Y
	Image: Accept Image: Page 1 of 1 (1 items)	18/12/2023 15:28 Page size: 20 🔻

Desktop Version

When you are named as an approver of a document you will receive an action in your workload listing, you can navigate to this from your workload by selecting "Awaiting Approval" under actions in the document listing, to do this click the blue number beside the flag.

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Modules	Workload	Analysis
Workload for A	Admin, PG	
> Administra	tion (13)	
> Audit and M	lonitoring (1)	
v Documents	(2)	
Awaiting /	Approval	1
Document	t review actions	1
Look shoud to		
Next Week		
HEAT WEEK		
	C	Q-Pulse

This will open a window in the document module with all the documents you have to approve, click on each to open them in a new window.

📓 Custom Filter - Documents L	ist - Q-	Pulse			_ 0 %
File Edit View Actions	Wind	low Help			
🛅 • 📇 🂵 📚		Register: Draft	•		•
My Actions	<	Document Number 🔺	Document Title	Revision	Submission Date
Draft Documents To Approv Review Actions Outstanding Search Type Any Owner	ve (1) g (1)	SOP 50.001	<u>NHS Greater Glasq</u>	4.1	18/05/2020 12:31
Any Keywords Advanced P Search (Search My Searches My Folders	· ·				
Record(s) Found: 1					

It can also be seen that when you open the documents module, your actions are shown in the top left corner and can be used as a shortcut to find them also.

Alternative to this, you can search for the specific document in question from the front launch pad.



When you open the document record you have to approve, you will get a window with several tabs, there will be one for approval.

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File	Edit View Actions Window Help			
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4	Warning: Where this icon appears, refer to the tooltip for more information.			
	Type SOPs Number SOP 50.001 Revision 4.1			
	NHS Greater Glasgow & Clyde Policies Status Draft			*
	Owner McDermott, Shona V ··· By Date Filename Filename			
	Author McDermott, Shona 👻 ···· Keywords 50.001			
	Change Details		*	
2	Approval	A		*
	Change Requests			×
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Expand the approval tab to see the list of approvers.

Approval				* 1
Submitted: 18/05/2020	0 12:3	31 by Admin, PG		a
Responses Comments				
Approver	•	Response	Date	
🚨 Admin, PG				
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Select your name in the list and you will see a blue stamp button on the right become accessable, press this to add your approval.

This will open a window where you can either accept or reject the document and add appropriate comments.

Approval Respon	se	B	23
Response	Accept		
Comment	Reject		-
			-
	OK	Cance	

Once you have made your selectionm select OK to continue.

If you have accepted, the icon beside your name will turn green and show the date and time you accepted. Alternatively it will turn red if you have rejected.

SOP 50.001 (4.1) - Documents Details - Q-Pulse		• **
File Edit View Actions Window Help		
1 - 1 - 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2 -		
Warning: Where this icon appears, refer to the tooltip for more information.		
Type SOPs Number SOP 50.001 R	Revision 4.1	Ê
Title NHS Greater Glasgow & Clyde Policies Status Draft		*
Owner McDermott, Shona v ···· Implement By Date Filename		
Author McDermott, Shona 👻 … Keywords	50.001	
Change Details		
2 Approval	4	* ≡
All responded		2
Responses Comments		*
Approver Response	Date	*
2 Admin, PG Accept	18/05/2020 12:42	
		3
		2
		<u>iii</u>
		B
Change Requests		* -
Modified		

You can now exit the record and will be asked if you wish to save the changes you have made, alternatively you can press save first and then exit.