Management of SOPs through Q-Pulse Guide

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Guideline 50.023A - Version 1.0

1. Introduction

A large number of the functions detailed within the document will be completed centrally by the relevant Quality Assurance representative. For R&I in general this will be the Quality Assurance Manager with delegated authorities within the GCRF and Bio-Repository as an example. For those functions carried out centrally (QA) will appear in the title of the section, however interaction with staff will still take place to complete the functions within Q-Pulse.

Specific work instructions will be presented to staff in any instructions they receive from Q-Pulse as well as any Q-Pulse training they may receive.

2. Creating a new SOP record (QA)

When there is a requirement to create a new document in Q-Pulse which must be signed by the relevant approvers, this is achieved through the actions detailed within this section. This functionality is carried out by the Quality Assurance Manage or appropriate designee. Firstly, to begin the process of creating the relevant document record you must open the documents module from Q-Pulse. This is achieved by selecting the documents ribbon in the home screen which will in turn open a new window for the documents module.



From within the documents module in Q-Pulse, select "File > New > Document > Draft Document"

2) o	ustom Filter - Documents List - Q-Pulse		
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1	New •	Document +	Active Document Ctrl+N
8	Open Document Record Ctrl+O	Revision +	Draft Document Ctrl+Shift+N
111	View Document		Based On Selected
4	Print Ctrl+P		
2	Pre <u>v</u> iew		
	<u>R</u> eport Designer		
	1 FORM 51.015A (3.0)		
	2 SOP 01.002 (3.0)		
	3 SOP 51.015 (4.0)		
	4 SOP 55.008 (1.0)		
	5 SOP 55.005 (5.0)		
	<u>C</u> lose Window		

This will in turn open a new window which is an individual record for a draft document, this will not be an active document until appropriate signatures are in place and the document is then made active.

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Owner Author Change Details	v Implement By Date	Fil	words	ţ
Approval				3
Review History				
Revision History Properties				1

There are multiple fields to be completed within this document record, the first selection is to make an appropriate selection from the available options on the type of document. From the image below it is shown that numerous document types are available, SOPs, Forms and Guidelines are contained within the "Chapter" drop down option.

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The chapter option can then be expanded to give the option of all the available Chapter numbers and from this select whether it is an SOP, Form or Guideline.

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File B	dit View	Actions Window Help		
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	Title	tio-Repository	-	
		 CHAPTER 		
	Owner	 01 GTCU General Management CHAR 	TER\ ·	
	Author	Forms CHW	TER/01 GTCU General Management/	
	Autor	Guidelines CHA	TER(01 GTCU General Management)	-
	Change	SOPs CHAI	TER(01 GTCU General Management)	÷
		> 17 Cinical Research Fadity CHW	TER\	Ψ
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		> 59 West of Scotland Safe Haven CH48	TER \	
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When the appropriate selection has been made, the "Number" field will auto-populate with the appropriate prefix and select the next number available in the stack. This may not be the next number available and this must be confirmed and agreed with the RCB who manage the administration of SOP numbers. If this number is to be changed, it can be overtyped.

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Author r Keywords		
Change Details		4
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E Change Requests		×
Review History		×
Revision History		×
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The next fields are the revision number which will default to 1, this must be expanded to include the decimal point and may not always begin at 1.0. This can be changed if required. The next field is the Title, this is the name given to the document in question and must be typed in.

Following this, both the "Owner" and "Author" fields can be populated. Generally these names will be the same and will be reflective of the individual responsible for writing and updating the document in question. In some instances further into the lifecycle of a document these names may diverge to capture a change of ownership in the event the assigned author is no longer in post for example. The names for both fields can be selected from the list of all names entered into Q-Pulse.



The next field which can be populated is the "Implement By Date", in the event it is a requirement to meet a deadline for the release of a document this field can be used to track progress. This is not a mandatory field and if approval and release of the SOP is not time sensitive then this can be left blank.

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Properties													×
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11.15.1													
Modified													

The next field "Filename" is where the document itself is attached to the record, to achieve this select the button with 3 dots beside the field to open the document selection window.

2 New Documents - Documents Details - Q-Pulse	0	• 8
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Type SOPs * Number SOP 51.037	Revision 1.0	
Title Me Status		
Owner Admin, PG 🛛 🐨 Implement 24/01/2022 🕞 🖾 Filename		
Author Admin, PG = ··· Keywords		
Change Details		4 4
2 Approval		¥
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Sy Properties		¥
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This will open the following window which can be used to navigate through your local machines file structure and select the appropriate document. When this has been attached, select OK to add the document to the record.

Attachment description		
This attachment includes the following	g files:	
tile Name	Path	Add Files
No Files Attached		Add Folder.
		Add URL
		Extract
		Remove
		View
		Set Index
Attachment Management		
Off (this attachment will be reader to the second secon	anaged manually)	
③ Embed in Q-Pulse (most secure	 Delete original file(s) 	
O Store In		Delete original file(s)

The final field for completion in this section is "Change Details", this will become more relevant through the life cycle of the document and can be used to explain how this document differs from previous versions. In the event of a first release, used the words "First Release" for example.

😥 New Documents - Documents Details - Q-Pulse	0	• 8
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12 • Ⅲ 🛃 💩 🖉 🗟 🖹 🕹 🕨 🛎 🗏 📂 🖉 🐼 😋 😳		
Type SOPs v Number SOP 51.037 Revision 1	.0	
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Author Admin, PG 💌 🚥 Keywords		
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Modified		

The next section is to then set up the approvals and sign off of the document, before this is achieved you must save the document record as completed so far. To do this select the save button at the top of the record.

When saved, expand the "Approval" ribbon in Q-Pulse and from here you can add the names of approvers as required. This is achieved by selecting the button to the right hand side with the picture of the person with the green plus symbol.

CP 51.037 (1.0) - Document Edit View Actions (Details - Q Pulse (jindow Help					-	-
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Title Title			Status Draft				
Owner Admin, PG		By Date 24/01/	2022 📃 🕅	Filename	Testing		
Author Admin, PG				Keywords			
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Approver	- Response				Date		
Change Requests							
Review History							
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Revision History							
Revision History Properties							

By selecting this, a new window will open from which you can search for users within Q-Pulse as shown below. Repeat this process until all required approvers have been added.

Search for Person	23
Show Users Only	
Department	
Any	-
Group	
Any	*
Keyword	
gribbon	
	🔑 <u>S</u> earch 🗙
Full Name	Department / Organisation
Gribbon, Paul	Research Governance

This will add all of the named approvers to the record as shown below, from here you must then select the order in which the approvals are conducted by select the workflow order button.

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Title T	lte				Status Draft	1.037			10		*
Owner A	idmin, PG	Ŧ	Implement By Date	24/01/2022	3	!	Filename	Testing			
Change D	etails First Re	case					ACTION 1			t	
Approval											*
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This will then open the following window, you can stagger the approval order for those assigned by selecting the name and using the side arrow as shown below to change the order of approvals.

Edit Workflow	P 23
1. Gribbon, Paul	
1. Admin, PG	
Igeert	1 1
	OK Cancel

In the example shown, this has changed the 2nd approval to have a number 2 beside the name which means they will be the 2nd to sign after number 1 has completed their approval. This can be expanded as required to 3rd or 4th approvers also.

🕑 Edit Workflaw	23 S
1. Gribbon, Paul	
2. Admin, PG	
Igert	🗢 🖶 🖡 🖡
	[*********
	OK Cancel

When the appropriate approvers and workflow have been assigned, you can then return to the document record and release the document for approvals. This is achieved by selecting the green play button to open the approval wizard. Once opened, select next to progress.



The next window then confirms the version number of the document and room for comment to the approvers, in this case you can add "first release" or any relevant details for the approvers. Select Next to continue.

Submit For Approva	Wizard - SOP 51.037, Title, Rev 1.0	23
Submit Draft Confirm th	for Approval e details of the submission:	
Revision No.	1.0	
Comment	First Release	
	< <u>B</u> ack <u>N</u> ext > Cance	

The final page will provide a summary of what the actions will be in relation to the approvals, if this is all correct then select "Finish" to begin the approval process.

Submit For Approval Wizard - SOP 51.037, Title, Rev 1.0	23
Results Summary Please review the wizard summary before finishing A new Draft at rev 1.0 will be created 2 Person(s) must approver this document; the document be automatically submitted for approval. A place holder has been specified for the current Draft revision, no move required.	p. It will
After Finish - Display Details of the Document	
< <u>B</u> ack <u>F</u> inish Ca	ancel

Once the approval process has begun, it shows as a statement that it has been submitted for approval and the approvers will be colour coded. Yellow shows that the approval action is with the individual, red shows it is pending and they have not yet been notified and green shows they have submitted their approval response. This can be misleading as it will appear as green even if the decision was to reject so must be reviewed.

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Warning: Where this icon ap	opears, refer to	the tooltip for	more inform	ation.						_
Type SOPs			*		SOP 51.037			1.0		
Title Tite					Draft					
Owner Admin, PG		Implement	24/01/2022	1	a 3	Filename	Testing			
Author Admin. PG	-	by Date				Keywords				٦.
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Change Details										
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Approval									<u>.</u>	
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Approval Submitted: 18/11/2021 10:: Responses Comments Approver Gribbon, Paul Admin, PG Change Requests Review History	28 by Admin, f	75					Date		4	
Approval Submitted: 18/11/2021 10:3 Responses Comments Approver Gribbon, Paul Admin, PG Change Requests Review History Revision History	28 by Admin, I Response	AG					Date		4	
Approval Submitted: 18/11/2021 10:: Responses Comments Approver Gribbon, Paul Admin, PG Change Requests Review History Revision History Revision History	28 by Admin, 1 Response	AG					Date		4	

When an assigned approver has been notified of an approval action, Q-Pulse will send them an E-Mail to detail the required action. An example of this is detailed below.

This E-Mail will contain some basic instructions and a link to a how to guide to complete the required actions.



When a user logs in to complete an approval action in Q-Pulse they will be greeted with a window similar to the window shown below, from a drop down they can select "Accept" or "Reject" and make a comment in line with their decision if required.

🗿 Approval Respons	se	B	23
Response	*		
Comment	Accept Reject		
			-
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When all approvers have responded, the record will update to show all have responded and their icon will appear as green.

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Warning: Where this icon appears, refer to the tooltip for more information.	
Type SOPe • Number SO	P 51.037 Revision 1.0
Title Title Status Dre	aft. ÷
Owner Admin. PG + on Implement 24/01/2022	Filename Testing
Author Admin PG	Kanaurela
Author Admin, Pa	Nejwords
Change Details	
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American	
- Address	4 "
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All responded	44-
All responded	
Responses Comments	** **
Responses Comments Approver Contract Response	Dote
All responded Responded Approver Response 3 Grbbon, Paul Accept 4 Address Paul Accept	Dote
Responses Responses Comments Approver Response Gribbon, Paul Accept Admin, PG Accept Accept Comments Response Response	Dete
All responded Responded Approver Response Gribbon, Paul Accept Accept Accept	Dote
Responses Responses Approver Response & Gribbon, Paul Accept & Admin, PG Accept	Date
Responses Comments Approver Gribbon, Paul Accept Admin, PG Accept	Dote
Responses Comments Approver Gribbon, Paul Accept Admin, PG Accept	Dote 18/11/2021 10:29:00 b 18/11/2021 10:29 08/11/2021 10:20
All responded Responses Comments Approver Response Sinbbon, Paul Accept Admin, PG Accept	Dote 19/11/2021 10:29:00 b 18/11/2021 10:29
All responded Responses Comments Approver Response Grbbon, Paul Accept Admin, PG Accept	Dote 19/11/2021 10:29:00 b 18/11/2021 10:29
All responded Respondes Approver Response Gribbon, Paul Accept Admin, PG Accept	Date 18/11/2021 10:20:00 b 18/11/2021 10:29 18/11/2021 10:29 2 2 2 3
All responded Respondes Approver Response Gribbon, Paul Accept Admin, PG Accept Change Requests Review History Revision History Revision History	Date 18/11/2021 10:20:00 b 18/11/2021 10:29 2 2 2 2 2 2 2 2 2 2 2 2 2
All responded Responses Comments Approver Response Solution Accept Admin, PG Accept Change Requests Revision History Revision History Revision History	Date 18/11/2021 10:20:00 b 18/11/2021 10:29 2 2 2 3 3 3
All responded Responses Comments Approver Response Gribbon, Paul Accept Change Requests Revision History Properties	Date 18/11/2021 10:29:00 b 18/11/2021 10:29 2 2 2 2 2 2 2 2 2 2 2 2 2

When all approvals have been returned, the document will then be made active by selecting the "Activate Document" button



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This will then open the following wizard to make the document active, to continue select the "Next" button.

Activate Document Wizard - SOP 51.037, Title, Rev 1.0	23
Welcome to the Activat Document Wizard	te
This wizard will assist in activating a	Draft Revision
< Back	t > Cancel

The next window will then confirm several details, the "Active Date" field will default to the current date but can be overtyped to reflect a different date if required, when completed, select "Next".

Activate Document Wizard - SOP 51.037, Title, Rev 1.0	23
Confirm Revision Details This revision will become active. Please confirm the details below	N:
Revision 1.0 Active Date 18/11/2021	
First Release	*
< <u>B</u> ack <u>N</u> e	xt > Cancel

The next section is to then assign the appropriate names for the "Read and Comprehend" and "Notification" process for documents detailed in section 7. The option to automatically distribute is not selected so this action must be completed manually after, select "Next" to continue.

ctivate Document	Wizard - SOP 51.03	7, Title, Rev 1.0	23
Confirm Dist Add peop created:	tribution ple who must ackno	wledge the fact that this new revision has been	
Copyholders	Notify Only		2 2
Copy No 🔺	Copyholder	Department/Organisation	2/
Automatical	y distribute record o	n activation.	
		< <u>B</u> ack <u>N</u> ext >	Cancel

The final page will be a confirmation of the actions to be taken, if correct select "Finish".

Activate Document Wizard - SOP 51.03	7, Title, Rev 1.0	23
R	esults Summary Please review the wizard summary before finishing.	
G Q-Pulse	tev 1.0 will be made Active a place holder has been specified for the currently Active evision, no move required.	•
	After Finish - Display Details of the Document	
	< Back Einish Cancel	

This will then result in an active copy of the document being available on Q-Pulse, the "Implement By" date will now have changed to an "Active Date" and "Review Date".

Type SOPs Title Title			• Nun St	atus Active		Revision 1.0	
Owner Admin, PG Author Admin, PG Change Details First/	v v Release	Active Date	18/11/2021 18/11/2024		Filename Keywords	Testing	••• •
Distribution							¥
Change Requests							÷
Review History							8
Approved By							\$
All responded							24 24
Approver	Response					Date	1 4
2 Gribbon, Paul	Accept					18/11/2021 10:29:00 b.	
👗 Admin, PG	Accept					18/11/2021 10:29	

Once this is complete, a copy of the document will be sent to RCB for release on the CTU website.

3. Creating a new Version of SOP record (QA)

To create a new revision of a document in Q-Pulse, the first step is to locate the record of the document in question. If it is a known or specific document, it can be searched for under the document tab from the front launch screen. To achieve this, expand the document tab and search for the document using either its number or title.

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Modules	Workload	Analysis
СА/РА		*
Audit and Monitori	ing	¥
Documents		*
1 New		
Recently Viewed		
Folders		
SOP 60.001		
Sponsors		¥
People		¥
Training Courses		¥
🚰 Sites		*
Assets		¥
Occurrences		¥
Incidents		*
		Q -Pulse

This will open a new window with a list of the returned documents. When the document record has been located, there are a number of ways to then create a new revision of the document.

🔄 Custom Filter - Documents List - Q	Pulse	_ •	23
File Edit View Actions Wine	iow Help		
🗎 · 📇 🎛 📚 🧖	Register: Active	2	
My Actions <	Document Number	Active Date	
No Actions to display,	SOP 60.001 SOP Title 1.1	14/02/2022	_
Search			
Туре			
Any -			
Owner			
Any *			
Keywords			
Advanced 🔑 Search 😱 🗙			
🔎 Search			
My Searches			
A My Folders			
Related Documents			
-			
Record(s) Found: 1			

The first option, when the record has been located you can right click on the line listing and select "Revise Document >Draft (Using Approval)"



Alternatively, from the same location when the document in question is highlighted you can select "File > New > Revision > Draft (Using Approval)

2) o	ustom Filter - Documents List - Q-	Pulse				- 0 %
File	Edit View Actions Wind	dow Help				
1	New	•	Document 🕨	- 📑 🔁 📃) - 🚺 🖳 🕐 - 🗉	2
	Open Document Record	Ctrl+0	Revision 🕨	Draft (Using Approval)	Revision	Active Date
	View Document		SOP Tit	Active	1.1	14/02/2022
2	Print	Ctrl+P			,	
	Preview					
	Report Designer					
	1 SOP 60.001 (1.1)					
	2 SOP 60.001 (1.0)					
	3 SOP 51.037 (1.0)					
	4 FN1 (1.0)					
	5 SOP 51.035 (1.0)					
	Close Window					
Adva	anced 🔎 Search 🙀 🗙					
	Formels					
-	Search					
	My Searches					
	My Folders					
	Related Documents					
	·					
Rec	ord(s) Found: 1					

The final option is to first open the record for the document question, from here select "File > New> Revision > Draft (Using Approval)

2) sc	0P 60.001 (1.1) - Documer	its Details - Q-Pulse	-	= X3
File	Edit View Actions	<u>Window</u> <u>H</u> elp		
1	New +	Document 🕨 📃 🤽 🚉 💷 😳 🤁 - 📮 🛷 🕝 💿		
	View Document	Bevision Draft (Using Approval)		
5	Save Ctrl+S	Active		
	Save and Close	30P 50.001 Reveloa 1.1		
&	Print Ctrl+P	Status Active Under review		*
	Print Preview	The Active Date 14/02/2022 The Filename		
	Report Designer	🔻 ··· Review Date 14/02/2023 🔄 🔀 Keywords test		
	1 SOP 60.001 (1.1)			÷.
	2 SOP 60.001 (1.0)			w.
	3 SOP 51.037 (1.0)			
	4 FN1 (1.0)			*
	5 SOP 51.035 (1.0)	(1)	,	¥
	Close Window			×
- 23	Revision History			¥
2	Approved By		A	×
8	Properties			¥
~				-

All of these options will result in the following window being opened to start the wizard which will guide you through the process. Select Next to continue.

Revise with Approval Wizard - S	OP 60.001, SOP Title	23
Ğ	Welcome to the Revise with Approval Wizard	
Slud-9	This wizard will assist in revising the selected Document Revision by following the Q-Pulse Draft Approval Process	
	< Back Dext > Cance	4

The next page will present you with a new window in which the details for the document can be updated, this includes the revision number and the title. Revision numbers can only be increased in full number increments, increase this number to the next in sequence. Select Next to continue.

Revise with Approval Wizard - SOP 60.001, SOP Title	23
Confirm Draft Document Details Confirm the details of the new draft document:	
Type SOPS Vumber SOP 60.001	
Revision 1.2	
Title SOP Title	
	ancei

If any change requests are raised against the document which are still pending implementation a window will appear asking if you wish to implement them in this revision. Select any that are appropriate at this stage and select Next, this is covered in more detail in Section 5.

oval Wizard - SOP 60.001, SOP Title	23
hange Requests to Implement hose change requests which you intend to implement in this new	
Details	Implement
Enter the details of the change request here	
< <u>B</u> ack <u>N</u> ext >	Cancel
	toval Wizard - SOP 60.001, SOP Title hange Requests to Implement those change requests which you intend to implement in this new Details Enter the details of the change request here Back Next >

The next page will contain the list of assigned approvers for the document, if no change requests were present this would have appeared previously. If approvers have already been assigned to the existing version of the document they will be carried forward.

Confirm Approvers		
Select the people who wil	I be responsible for approving this draft:	
Approver		1 2
Approver 1		
Approver 2		
Approver 3		
7 When we take a described by		
When created, automatically s	submit the new draft to approvers.	

The list of approvers can be updated by using the add and remove approver buttons on the right hand side. The workflow must be set appropriately to ensure the approvals happen in sequence. The left and right arrows can be used when a name is highlighted to ensure they are stacked appropriately.

Guideline 50.023A - Version 1.0

2 Edit Workflow	B	23
1. Approver 1		
2. Approver 2		
3. Approver 3		
		-1
		_
Insert		
OK	Cancel	

When the approvers have been appropriately assigned, select Next to continue the process. At the bottom of the page there is an option to automatically submitted for approval when created, if this is selected the approvers will be contacted as soon as the document is created to approve.

The next page will allow you to upload the appropriate updated document, this is achieved by selecting the button with the 3 dots to the right of the field. This will open a standard document selection window, locate the document and attach.

Revise with Approval Wizard - SOP 60.001, SOP Title	23
Specify New File Specify the controlled files for this new revision:	
Browse to select the new file(s) or leave blank to assign later.	
< <u>B</u> ack <u>N</u> ext > Cancel	

When the document is attached, select "Next" to continue.

The final page will act as a confirmation of all the details entered, if all correct then select "Finish"

evise with Approval Wizard - SOP 60	0.001, SOP Title	23
Q-Pulse	Results Summary Please review the wizard summary before finishing. A new Draft at rev 1.2 will be created 3 Person(s) must approver this document; the document will be automatically submitted for approval. No attachment is specified for the new Draft revision, no move required.	4
Ē	✓ After Finish - Display Details of the Document	-

Guideline 50.023A - Version 1.0

This will open a new window with updated document record.

📓 so	P 60.001 (1.2) - Documents Details - Q-Pulse	_		23
<u>F</u> ile	<u>E</u> dit <u>V</u> iew <u>A</u> ctions <u>W</u> indow <u>H</u> elp			
	- III 🔒 🍛 🙍 🙀 🖹 🚨 🕨 🚢 💷 🦻 📮 🇇 🕥 🕥			
Δ	Warning: Where this icon appears, refer to the tooltip for more information.			
	Type SOPs Number SOP 60.001 Revision 1.2			
	Sop Title Status Draft Under review			*
	Owner Implement By Date Filename Filename			
	Author Keywords test			
	Change Details		•	
2	Approval	A		*
	Change Requests (1)		*
5	Review History			*
6	Revision History			*
٧	Properties			*
				:

When the new revision window is opened, enter the appropriate "Change Details" with an explanation of the difference from the previous version.

When an updated document has been created, the previous version history is visible from the "Revision History" tab.

Reviewi	listory			÷
Revision	History			*
Revision	▲ Status	Change Details	Active Date	
1.0	Obsolete	First Release	14/02/2022	B
1.1	Active		14/02/2022	
1.2	Draft			

Guideline 50.023A - Version 1.0

If the box to automatically submit the document for approvals was not selected during set up, it may be submitted at this stage. To submit a document for approval, expand the approval tab from within the document record and select the submit for approval button on the right hand side.

	_	

When submitted for approvals, the icon beside the names will change colour as it moves through the process. The first user will appear as yellow to show the action is with them, the other will remain red as they cannot yet complete an action. Once an approver completes their approval action the icon will change to green.

SOP 60.001 (1.0) - Documents Details - Q-Pulse		• 23
<u>File Edit View Actions Window H</u> elp		
1 - 1 🗟 🖉 🧎 🚨 🕨 🔺 💷 📴 📿 ⊘ 🥥		
Warning: Where this icon appears, refer to the tooltip for more information. View Approval History View all approval history		
Type SOPs Number SOP 60.001	Revision 1.0	i i
Title SOP Title Status Draft		\$
Owner Implement By Date 01/03/2022 Filename	SOP 60.001	
Author v ···· Keywords	test	
Change Details First Release		A
		Y
2 Approval	4	*
Submitted: 14/02/2022 10:37 by Admin PG		2
Submitted. 14/02/2022 10.57 by Admin, PG		×
Responses Comments		
Approver Response	Date	
2 Approver 1		
Approver 2		9
2 Approver 3		
		-
		:車:
Change Requests		* -

When a user has been requested to complete an approval action they will get an E-Mail notification which contains a how to guide on completing.

Docume	ent Awaiting Approval	- Outlook - Work - Microsoft Edge	-		×
() abo	outiblank				
≪∋ Rep	sly all 🗸 🛛 📋 De	elete 🛇 Junk Block …			
Docu	ment Awaitir	ng Approval			
Ū	This message was se	nt with High importance.			î
ß	This sender V6Qpuls	eLive@ggc-apps.scot.nhs.uk is from outside your organisation. Manage sender			
V	V6QpulseLive@ Mon 14/02/2022 10: To:	hggc-apps.scot.nhs.uk 🗧 🖬 🖒 5	«ŋ -	÷	•
	ATT0000 346 bytes	1.bin V ATT00002.bin V Locate Record.qpulse V			
	3 attachments (36 KB)	Save all to OneDrive - NHS Scotland Download all			- 1
	Locate record in Q	Pulse Web			
	NHS	Approval of New Document			
	Greater Glasg and Clyde	jow			
	You are recieving been released for	this E-Mail as you are a nominated approver for a document on Q-Pulse which has approval.			
	To give your appr	oval for this document, you can follow the links attached in this E-Mail,			- 1
	For detailed guida	ance, step by step instructions can be found here:			- 1
	Inorthnet-11 wg-re	search: common 2. Governance: Quality Q-Pulse Guides Document Approval			- 1
	Number	SOP 60.001			- 1
	Devision	30 The			- 1
	Owner				- 1
	Change Details	First Release			- 1
	Reply Forwar	d			

When all approvals have been completed, follow the same process as detailed in Section 2, page 14 onwards, to make the document active.

4. Make Document Obsolete (QA)

During the review of documents it may be required to remove a document from Active status as it is no longer required. This is achieved by completing Form 01.006C and actioned by the Quality Assurance Manager or appropriate designee. To carry out this action, navigate to the record in question and select "Actions >Deactivate Document", this will then launch a wizard to guide you through this process.

2 50	P 50.019 (1.0)) - Doc	uments Details - Q-Pulse								-	23
Eile	$\underline{E}dit = \underline{V}ieuv$	Acti	ans <u>W</u> indow <u>H</u> elp	_								
1	- 35	۵,	Add Copyholders	EL 🔍	. 2. 1		🕐 - 📮	J 🕼 🔅	0			
		2	Add Notified Only			~ ~					_	_
	Туре 😒	10	Distribute Document		Ŧ		SOP 50.019)	Revision L	0	_	
	Title 🔟		Ac <u>k</u> nowledge				Active					*
	Owner G	0	Deactivate Document	ive Date	07/10/2019		<u> 1</u>	Filename	SOPOL 006 V	10.0 draft .		
	Author G		Reigstate Document	ew Date	07/10/2021		T T	Keywords				
	Change De		Add Change Request					-				
	change of	+	New Action								-	
		1	Complete Action								-	_
	Distributio	1	Reopen Action									¥
	Change Re	Ē	New Regiew									¥
	Deview His	2,	Add Approvers									×
5	ICC VIEW FILE	ą	Add Note									Ť
	Revision H		View/Edit Properties									¥
2	Approved	By										*
٥	Properties									۲		¥

The first page of the wizard is a confirmation of the action to be taken, to proceed with this process select "Next".



The next page is to select whether the document is to become Obsolete or Inactive and state the reasons for this. Either option will remove the document from Active status and can be selected dependent on the circumstances. Once this is completed, select Next.

Deactivation Wizard - SOP 50.019, Test SOP, Rev 1.0	23
De-Activate Document Choose the new status of the document to be de-activated:	
De-activate this document by making it: Obsolete	
C Inactive	
De-activate reason: Reason for making document Obsolete/Inactive	
· · · · · · · · · · · · · · · · · · ·	
< <u>B</u> ack <u>N</u> ext > Cano	el

The final page is a confirmation of the action to be taken, if this is correct then select Finish to confirm.

Deactivation Wizard - SOP 50.019, Test SOP, Rev 1.0	23
Results Summary Please review the wizard summary before finishing.	
Rev 1.0 will be made Obsolete	*
After Finish - Display Details of the Document	
< Back Einish Cancel	

П

Once this has been completed, the status of the document will be changed to reflect. The record itself will still be accessible to act as evidence if ever required.

Intel Mew Actions Window Help Intel SOPs Intel Test SOP Owner Gröben, Paul Author Gröben, Paul Intel Test Release
Image: Sope source Image: So
Type SOPs Number SOP 50.019 Revision 1.0 Title Test SOP Status Obsolete Dwner Grbbon, Paul * Active Date 07/10/2019 Image: Control of the status Author Grbbon, Paul * Obsolete 07/10/2019 10:20 Keywords Change Details First Release
Tritle Test SOP Status Obsolete Dwner Grbbon, Paul * ··· Active Date 07/10/2019 Fillename 50201.006 v10.0 draft ··· Author Grbbon, Paul * ··· Obsolete 07/10/2019 10:20 Keywords Change Details First Release ··· ··· ··· ···
Dwner Grbbon, Paul * Active Date 07/10/2019 Image: Control of the control
Author Gribbon, Paul v v Obsolete 07/10/2019 10:20 Keywords Change Details
Change Details First Release
Distribution
Change Requests
Review History
Revision History
2 Approved By
🐓 Properties 🖘 🕫

Once a document is deactivated in this way, an automated message will be sent to the Author, Owner and Copyholders of the document to inform them of this.

I 7 0 4	💌 😹 🕴 🗧 [BlockedURL][Extx	emaltoGGC]Document Dea	activated - Messa 🔔	= x
Message De	eveloper			
Reply Reply Forward to All Respond	Delete Move to Folder *	Block Not Junk Sender Junk E-mail D	Categorize Follow Mark as Up * Unread Options 5	BA Find
From: cpulsetest@ To: Gribbon, Pau Cc: Subject: [BlockedUR	ggo-apps.scot.nhs.uk / L)[Externalto/GC]Document Deal	tivated	Sent Mon 07/10/	2019 10:20
🖂 Message 🛛 🕑 Locate	Record.qpulse (417 B)			
Locate record in Q-Pul Details: The followin	<u>ise Web</u> g document has been deact	ivated		Ĩ
Туре	c	HAPTER\50 General\S	OPs	
Number	5	SOP 50.019		
Title	1	est SOP		
Revision	1	.0		
Status	c	Obsolete		=

5. Change Requests

A Change Request is a record held against a document within Q-Pulse to act as a reminder for actions to be taken during its review, as a notification process for issues with a document by a stakeholder or for the purpose of seeking clarification. All Q-Pulse users with access to the document module will have the ability to raise Change Requests against a document.

5.1. Raising a Change Request

A change request can be raised against an SOP, Form or Guideline by any Q-Pulse user with access to that document. In order to raise a Change Request, the document record must first be located and opened. This can be achieved by expanding the document tab from the front launch pad and using the search bar to search for it by its number or title.

O LaunchPad <admin, pg=""></admin,>		
		🤃 • 🤱 • 🔮 •
(9) ideagen		
Modules	Workload	Analysis
СА/РА		*
Audit and Monit	toring	¥
Documents		\$
1 New		
Recently Viewed		
Tolders		
SOP 60.001		P
Sponsors		* =
People		¥
Training Course	25	¥
🚰 Sites		¥
Assets		¥
Occurrences		¥
Incidents		¥
Administration		(35)
		Q-Pulse

Guideline 50.023A - Version 1.0

This will open the document window with a list of documents that match the criteria entered.

🔄 Gusten Filter - Documenta List - Q-Pulse 👘 🗵 🖾								
Eile Edit ⊻iew Actions Wind	dow <u>H</u> elp							
🛅 · 🗁 💷 📚 🔎	Register Active *		• 🚺 🖳 🛃 + 💷 🚢					
Hy Actions c	Document Number	 Document Title 		Revision	Active Date			
No Actions to display.	SOP 60.001	SOPTIte		1.0	14/02/2022			
Search Type Any T Owner Any T Keywords								
Advanced 🔑 Search 🖏 ×								
A Hy Folders								
Record(s) Found: 1								

There are 3 different ways in which a change request can be added to a record, the first option is to right click on the line listing for the document in the returned search results and then selecting "Add Change Request".

🔄 Custon Filter - Documents List - Q	-Pulse				
Eile Edit View Actions Wind	dow <u>H</u> elp				
🛅 · 🗁 💷 📚 🔎	Registen Active		i • 🚺 🖳 💆 • 💷 🚢		
Hy Actions c	Document Number	Document Title		Revision	Active Date
No Actions to display.	SOP 60.001	SOP Title		1.0	14/02/2022
		T View Document			
		New Documents			
Search		New Document Based On			
Tuna		Add Change Request			
Any T		View Change Reguest History			
Owner		S New Review			
Any *		Revise Document			
Keywords -		Se Add Copyholders			
		Add Notified Only			
		Distribute Document			
		Acknowledge			
		Deactivate Document			
		Add Ngte			
		View/Edit Properties			
Advanced 🔑 Search 🐑 🗙		Add Documents to 'My Folder'			
Sauch	1	Remove Documents from 'My Folder'			
2 Scarca		📡 Delete 🔸			
My Searches					
A My Folders					
Selated Documents					
Record(s) Found: 1					

Guideline 50.023A - Version 1.0

Alternatively, you can open the document record and from this window select "Actions > Add Change Request"



The final option is also within the document record window, expand the Change Request tab and click the add change request button.

				-0-									
📓 so	P 60.001 (1.0) - Do	cuments Deta	ails - Q-Pulse							_		23
<u>F</u> ile	<u>E</u> dit <u>V</u> ie	w <u>A</u> cti	ions <u>W</u> ind	ow <u>H</u> elp									
	•		الم	2.0	7 📮 🛽	. 🌲 🛛		🕐 - 🚅	۵ 🍫	0			
4	Warning:	Wheret	his icon app	ears, refer to	the tooltip for	more inform	ation.						
	Туре	SOPs				-		SOP 60.001		Revision 1.0			h
	Title	SOP Titl	e				Status	Active					
	Owner	Gribbon	, Paul	·	Active Date	14/02/202	2		Filename	SOP 60.001		••••	
	Author	Gribbon	, Paul	·	Review Date	14/02/202	3		Keywords	test			
	Change	Details	First Releas	e								•	
	Distribu	ution									A	*	
	Change	Reque	sts									*	
Nu	umber	▲ Stati	us	Raised By	Detai	s				Raised Date		4	
													Add Cl
	Review	History	,									*	
													•

All of these options will result in a new window being opened, from this you can record details of the change request you wish to create.

🗿 Add Change Request	- SOP 60.001, SOP Title (Active)		5 23
Details			
			T
Supportinginformati	on		
Confirm raise informa	ation		
Raised by	Admin, PG 🛛 🔻 …		
Raised Date	14/02/2022 🔤 🔯		
Severity	2 - Medium 🔻		
		ок с	ancel

Several fields will be pre-populated, the name of the account you are logged in with and the current date as well as a default severity rating. Each field can be updated.

The first step is to use the "Details" field to record a description of the issue, clarification, suggestion or question as required. This should be of sufficient detail that the owner of the document is able to understand the full detail.

If appropriate, supporting documents can be attached. For example, a track change copy of an updated version of the document, a report or form produced as an output of the SOP, email correspondence etc. Raised by and Raised date can be changed if being completed on behalf of someone else and the appropriate severity can be selected. For example, if it is a note to correct typos is can be Low, a suggested improvement which may impact on outputs may be medium or a critical issue which will immediately impact on a process would be High.
To add a document in the supporting information field, select the button to the right with 3 dots to open the following window, from here files can be added using the "Add Files" button. This will open a standard Window document explorer window where the appropriate document(s) can be selected and added. This process can be repeated for multiple documents in this field. This will add the documents to the Change Request for review by the document owner.

2 Edit Attachment			P Σ
Attachment description			
This attachment includes the following files	:		
File Name	Path		Add Files
No Files Attached			Add Folder
			Add URL
			Extract
			Remove
			View
			Set Index
Attachment Management			
Off (this attachment will be managed	d manually)		
Embed in Q-Pulse (most secure)	Delete original file(s)		
O Store in		 Delete origin	nal file(s)
		ОК	Cancel

When all fields have been satisfactorily entered, press the OK button to add this change request to the document record. As can be seen below, a new line has been added to the change request tab to show the details. The Change Request will be assigned a unique ID number when you press save on the document record, you will be prompted to save before you can close the document record. If you do not save, the change request will not save to the document record and be discarded.

📓 so	P 60.001 ((1.0) -	Documen	ts Deta	ils - Q-Puls	e										▣	Σ	3
<u>F</u> ile	<u>E</u> dit <u>V</u> ie	ew <u>A</u>	<u>A</u> ctions	<u>W</u> indo	ow <u>H</u> elp													
	▼			\triangleright	2	5	. 2	, 🚑 🗏			4	۷ 🌾	3 (9				
Δ	Warning:	Wher	ethis ico	n appe	ars, refer	to the tool	tip for r	more inform	ation.									
	Туре	SOPs	;					•		SOP 60.	001			sion 1.0			ľ	ĥ
	Title	SOP	Title						Status	Active	_						2	
	Owner	Gribb	on, Paul		-	Active	Date	14/02/202	2	•		Filename	SOP	60.001				
	Author	Gribb	on, Paul		·	Review	Date	14/02/2023	3	i		Keyword	s test					
	Change	Deta	ils ^{First}	Releas	e											•		
	Distrib	ution													A	3	*	=
	Change	e Req	uests											(1))	:	2	
Nu	mber	▲ S	tatus		Raised By		Detail	S						Raised Date			1	
		N	ew		Admin, PG	;	List th	e details rele	evant to the	e change r	request			14/02/2022		ļ		
																5	2	
																L.	3	
																	l	_
5	Review	Hist	ory													;	۶.	-
Modi	fied																	

As can be seen below, when saved an ID number will be assigned.

	Number 🔺	Status	Raised By	Details	Raised Date		
	CR113	New	Admin, PG	List the details relevant to the change request.	14/02/2022	٦	l
l						R	

5.2. Review a Change Request

When a change request has been created, the document owner will get a notification with a basic overview of the details as seen below.



A document owner is then able to log in to Q-Pulse, navigate to the document record in question and open the change request record. This will produce a new window with more options than the one shown before.

🗿 Edit Change Reque	est - SOP 60.001, SOP Title (Ac	tive)			B	23
Number	CR113		Status	New	-	
Raised By	Admin, PG	+	Raised Against Revision	1.0]
Severity	2 - Medium	-	Raised Date	14/02/2022	e	
Details	List the details relevant to the	e change r	request.		*	
					×	
Attachment		•••	Implement By		•	
Owner	Gribbon, Paul	+	Implemented In Revision		*	
Response Comment					•	
				ок	Cancel	

From here, all fields not greyed out can be edited, the original details can be expanded if required, more attachments added, owner change, severity changed and a response provided.

When the owner has reviewed the details and made a determination they are able to either "Accept" or "Reject" the change request by updating the status field. If they decide to reject, the change request will no longer be active and not play a further role in future actions but be retained as a record. If the decision is made to accept, it will remain for future document reviews and updates. An optional implementation date can be entered to track and manage a timescale for implementation.

As can be seen in the example below, 3 change requests have been added with 3 different statuses.

Edit View	Actions Window	Help						0 8
• III III	rethis icon appears, r	efer to the tooltip form	ore information.	🕅 • 📮 🤅	00			
Type SOP	5			-	Number SOP 60.001		Revision 1.0	
Title SOP	Tide				Status Active			
	Gribbon, Raul	····	Active Date	14/02/2022	3	Filename	SOP 60.001	
Owner	chobort, Paca							
Owner Author Chang	Gribbon, Paul ge Details First Rele	v	Review Date	14/02/2023		Keywords	test	-
Owner Author Chang Distribution	Gribbon, Paul ge Details First Rele	252	Review Date	14/02/2023		Keywords	test	1
Owner Author Chang Distribution Change Req	Gribbon, Paul Gribbon, Paul Je Details First Rele	252	Review Date	14/02/2023		Keywords	test (1)	<u>,</u>
Owner Author Chang Distribution Change Req Umber	Gribbon, Paul ge Details First Rele guests	ase Raised By	Review Date	14/02/2023		Keywords	test (1) Raised Date	4
Owner Author Chang Distribution Change Req Jumber R113	Gribbon, Paul ge Details First Rele guests Accepted	Raised By Admin, PG	Review Date	14/02/2023 details relevant to the	a change request.	Keywords	test (1) Raised Date 14/02/2022) A
Owner Author Chang Distribution Change Req Jumber R113 R114	Gribbon, Paul ge Details First Rele ge Status Accepted Rejected	Raised By Admin, PG Admin, PG	Review Date	14/02/2023 details relevant to the	e change request.	Keywords	test (1) Raised Date 14/02/2022 14/02/2022	A

When the document is to be updated, a prompt will appear asking if any change requests are to be implemented, if not selected for implementation they will be retained on the record until future updates. This field will not show any change requests which have been rejected.

Revise with Approva	l Wizard - SOP 60.001, SOP Title	23
Identify Chan Check thos draft:	ge Requests to Implement e change requests which you intend to implement in this new	
Number 🔺	Details	Implement
CR113	List the details relevant to the change request.	
CR115	Enter the details of the change request here	
	< Back	Cancel

If a change request is marked as having been implemented, the record will be updated in the "Implemented In Revision" field to show when the fix to the change request was implemented.

📓 Edit Change Reque	est - SOP 60.001, SOP Title (Active)		B	23	3
Number	CR113	Status	Accepted	-	
Raised By	Admin, PG 🛛 🔻 …	Raised Against Revision	1.0		
Severity	2 - Medium 🔻	Raised Date	14/02/2022 🔤		
Details	List the details relevant to the chang	je request.			
				-	
Attachment		Implement By		X	
Owner	Gribbon, Paul 🔻 …	Implemented In Revision	1.1	•	
Response Comment					
	L		OK Canc	el	

6. Document Review

6.1. Creating a Document Review (QA)

To create a document review record in Q-Pulse, the first step is to locate the record of the document in question. If it is a known or specific document, it can be searched for under the document tab from the front launch screen. To achieve this, expand the document tab and search for the document using either its number or title.

Q LaunchPad <admin, pg=""></admin,>		-	23
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Jueagen			
Modules	Workload	Analysis	
СА/РА		¥	Â
Audit and Monitori	ng	¥	
Documents		*	
New			
Recently Viewed			
Folders			
SOP 60.001			_=
Sponsors		¥	
Reople		×	
Training Courses		¥	
🚰 Sites		¥	
Assets		¥	
• Occurrences		¥	
Incidents		¥	-
		🕐 Q-Pul	se [,]

This will open a new window with the document listed. If it is a list of documents who are approaching their review period, the advanced search feature can be used. In the document window shown below, on the left hand side select the "Advanced" button with highlighted blue text to open a query window.

📓 Custom Filter - Documents List - Q	Pulse			_ 0 %
File Edit View Actions Wine	ow Help			
🛅 - 📇 🂵 📚 🔎	Register: Active		1 🖳 🕐 🕄	6
My Actions <	Document Number - Document 1	itle	Revision	Active Date
No Actionsto display.	SOP 60.001 SOP Title		1.1	14/02/2022
Search				
Туре				
Any 🔻				
Owner				
Any				
Keywords				
Advanced 🔎 Search 🙀 🗙				
Count				
/ Search				
🖉 My Searches				
🖀 My Folders				
Related Documents				
-				
Record(s) Found: 1				

This will open a window, clear any existing content by pressing the "X" buttons beside any existing lines to have a blank record as shown below. New conditions of the search can be added by selecting the "And" "Or" options.

P Advanced Search	83
File Edit Filter Help	
And/Or	

When you select "And" a new line will appear with blank fields.

3
.:
2

A list of options will be available which will change depending on the selections where a drop down list is available, all fields within Q-Pulse can be searched. The first field will give a list of all the fields associated with all documents in Q-Pulse. Expand the "Document Details" option to see a list of associated fields, in this list scroll down to select "Revision Review Date".

>	Document Details
>	Properties
>	Related Items
>	Notes
>	Change Request
>	Actions
>	Approval Cycle
>	Approvers
>	Approval Cycle Note
>	Copy Holders
>	Notified Only
>	Reviews
>	Review Actions
>	Tags
х	

With this selected, appropriate options will then be available in the 2nd field, in this instance select "on or before"

on	not on
before	on or after
after	on or before
between	not between
within	not within
up to	later than
since	earlier than
empty	not empty
х	

The final field will then allow you to enter a date, from here you can search for all documents slated as requiring a review within a given window, this can be a forward view of 6 months for example.

🖉 Advanced Search	23
<u>F</u> ile <u>E</u> dit Fil <u>t</u> er <u>H</u> elp	
Revision Review Date <= 01/01/2022	ŝ
Revision Review Date on or before on on bef	
And/Or	
	:

From here, you are then able to add extra search criteria by selecting "and" "or", select "And" beside the existing line and this will allow you to set a 2nd criteria search results must meet. The example below shows that only documents with an ID number starting with "SOP" will be returned.

🖉 Advanced Search	23
<u>F</u> ile <u>E</u> dit Fil <u>t</u> er <u>H</u> elp	
Revision Review Date <= 01/01/2022 AND Number starting with so	op 🔅
Revision Review Date 🔻 on or before 🔻 01/01/2022 🗐 🕅 🗶 And/O	<u>)r</u>
AND Vumber Vumber Vumber Value Valu	<u>)r</u>
And/Or	
	:

When the required documents have been identified there are 3 different options for creating a new review. The first is to right click on the document record from the search list and select "New Review".

📓 Custom Filter - Documents List - Q	-Pulse			_ 0 X				
<u>File Edit View Actions Win</u>	dow <u>H</u> elp							
🛅 • 📇 🎩 📚 🙍	Register: Active		🛛 🖳 🕐 - 🔍 i	*				
My Actions <	Document Number	ument Number - Document Title Revision Ad						
No Actionsto display.	SOP 60.001	SOP Title	1.1	14/02/2022				
		Open Document Record Ctrl+O						
		<u>V</u> iew Document						
		New Document Based On						
Search		Add Change Request						
Туре		View Change Reguest History						
Any	1	New Review						
Owner		Denies De summert						
Any								
Keywords	4	Add Copy <u>h</u> olders						
60.001		Add Notified Only						
Advanced 🔑 Search 🙀 🗙		Distribute Document						
Coards	:	Ac <u>k</u> nowledge						
/ Search	<u></u>	Deac <u>t</u> ivate Document						
🖉 My Searches		Add Note						
🙆 My Folders		View/Edit Properties						
Related Documents		Add Documents to 'My <u>F</u> older'						
-		Remove Documents from 'My Folder'						
	<u> </u>	Delete						
Record(s) Found: 1		· · · · · · · · · · · · · · · · · · ·						

The 2nd option is to open the document record and select "Actions > New Review"

2) so	P 60.001 (1.1)	- Doc	uments Details - Q-Pulse								83
File	Edit View	Acti	ons Window Help								
ħ	- 📰 🔓	a ,	Add Copyholders	4 24	â. =D	💷 • 🔮 💷	۵ 🗇	0			
4	Warning: Wł	2	Add Notified Only	Itip for mo	ore informatio	20.					
	Type 50	10 (10)	Acknowledge		v	Number SOP 60.001		Revision 1.	1		
	Title 🙍	2	Deactivate Document		-	Status Active					*
	Owner Gr	Ř	Reinstate Document	we Date	14/02/2022		Filename				
	Author Gr		Add Change Request	ew Date	14/02/2023	3	Keywords	test		-	
	Change De	÷	New Action							-	
		4	Complete Action							Ψ	
	Distributio	۹ ا	Reopen Action								¥
			New Review							-	-
	Change Ke		Add Note						(1)		÷
	Review Hit	ò	View/Edit Properties								×
	Revision H	istor		1							¥
2	Approved	By							4	7	×
3	Properties										¥
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The 3rd option is to expand the "Review History" tab in the document record and select the "New Review" button on the right hand side.

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- 31	1.51	
- 3	100	
	1000	

📓 so	P 60.001 (1.	1) - Documents Det	ails - Q-Pulse								. 0	23	3
File	Edit View	Actions Wind	low Help										٦
	-	8 🕹 💆	2.6	7 📮 名	. 🏖 🗉	i IV	🕐 - 📮	۵	0				
Δ	Warning: W	/here this icon app	ears, refer to	the tooltip for	more inform	ation.							
	Type S	OPs			-		SOP 60.001	_		1.1			ĥ
	Title <mark>5</mark>	OP Title					Active					*	
	Owner G	ribbon, Paul	·	Active Date	14/02/2022	2		Filename					
	Author G	Fribbon, Paul	•	Review Date	14/02/2023	}		Keywords	test				
	Change D	etails									-		
											Ψ.		
	Distributi	ion									3	*	
	Change R	Requests								(1)	3	*	
1	Review H	listory									3	*	
Re	evision	Reviewed On 👻	Performed B	y C	Dutcome	Com	iment				6		
												Ne	w F
											5	Er	nter
													÷.

All of these options will result in a new window being opened from which users can be tasked with reviewing the document. The review owner tab will be prepopulated based on the account creating the review, this can be changed and should be the document owner. The bottom of this window will have details of all existing change requests which can be considered by all the reviewers when conducting the review, the review owner should update the Change Request status as appropriate if this has not already been completed.

Admin, PG							
		*					
			~				
'S							
te	Reviewer	Action	Comment		Outcome	Review On	<u></u>
hange requests a	gainst document						
	Raised By	Deta	ils	Raised Date	St	atus	
	Admin, PG	List t	he details relevant to the cha	14/02/2022	Ad	ccepted	
	Admin, PG	Ente	r the details of the change re	14/02/2022	Ne	ew	
t	e ange requests a	e Reviewer ange requests against document Raised By Admin, PG Admin, PG	e Reviewer Action ange requests against document Raised By Deta Admin, PG List t Admin, PG Entee	e Reviewer Action Comment ange requests against document Raised By Admin, PG List the details relevant to the cha Admin, PG Enter the details of the change re	e Reviewer Action Comment e Raised By Details Raised Date Admin, PG List the details relevant to the cha 14/02/2022 Admin, PG Enter the details of the change re 14/02/2022	e Reviewer Action Comment Outcome ange requests against document Raised By Raised By Details Raised Date SI Admin, PG List the details relevant to the cha 14/02/2022 A Admin, PG Enter the details of the change re 14/02/2022 N	e Reviewer Action Comment Outcome Review On ange requests against document Raised By Details Raised Date Status Admin, PG List the details relevant to the cha 14/02/2022 Accepted Admin, PG Enter the details of the change re 14/02/2022 New

6.2. Adding Reviewers

Named individuals can be added to the review to act as a record that they have fed in to the process, the actual method for conducting this review may vary for each scenario. A group meeting to review the SOP may work best, or users to feed in remotely and individually can also be used. Each individual involved should be recorded in this review record to act as evidence of their involvement. To add a new reviewer, click the "add new reviewer" button on the right.



This action can be completed by the Quality Assurance Manager or designated Authority if they are informed of the required names, or by the individual responsible for the review.

This will open a new window in which the details of a reviewer can be added. A target date can be set in the top field which is the required date for any responses by the reviewer. The reviewers name can be selected from the "Reviewer" tab by either typing and selecting from the drop down or searching by pressing the button with 3 dots to open a search window. The text in the "Action Required" field is default but can be updated with specifics of what is required from the reviewer. The reviewer to complete.

🗿 Add/Edit Review Act	ion - SOP 60.001, SOP Title (1.1)	B	23
Target Date			
Reviewed On			
Reviewer	Admin, PG 🛛 👻 ····		
Outcome			
Action Required	Please review this document.		
			Ţ
Comment			
			-
	СК	Cance	

When you have entered the details for the reviewer, select Ok on this window and repeat this process as required to add the relevant reviewers. Once this is complete, select Ok to close the review window and save the document record.

All reviewers named will then receive an automated e-mail message to notify them that they have been added as a reviewer.

aboutblank	
aphy all 🗸 📵 Delate - 🚫 Junic - Dock	
view Action added to Document	
This worder Willpulsel leedpage approximities is from outside your argonization. Manage worder	
V6OpulseLive@ggc-apps.scot.nhs.uk	a
Wed 10/02/2022 (253	
to Gropon, roue	
Ch ATTO0001.bin V Ch ATTO0002.bin V	
2 strachmetrs (26.02) Save all to CheDrive - NIIS Sociand Download all	
and Clyste You are receiving this E Mail as you have been added as a reviewer for the document detailed below.	
Please review this document to determine if any updates or changes are required to its content and recert this dotail in Q Pulse and share with the document owner as required.	
A detailed instruction on how to complete the can be found in the link below	
Interfact/Hispetenet/Comment/Lifetenet/Solid/(SH)ale Conter/Decement Approval	
Number SOP 60 001	
Title SOP Tex	
Residen 1.1	
Overer 910000, F20	
Zentener Tarpet	
Europener Target Guidean, Paul 14 (2.2003	
Zaroaner Targel Golden, Paul 14/02/2003	
Zeroener Targel Guideas, Paul 14402-3003 Reply Formand	

6.3. Responding to a Document Review

When the reviewer navigates to the review record, they will see the same screen as before but with several areas greyed out as they can only respond to their own review line. They have visibility of the Change Requests to consider during their review as well as the document itself from the document record.

	e 60.001, SOP Title (1.1)							P
viewed On								
tcome		· ·						
view Owner Admin, P	G	T	_					
mment			×					
Reviewers								
Target Date	Reviewer	Action	Comment		Outcome		Review On	
28/02/2022	Gribbon, Paul	Please review this document.						
urrent Change red	quests against document							:
Turrent Change red	quests against document Raised By	Details		Raised Date		Status	5	
Turrent Change re d Number CR113	quests against document Raised By Admin, PG	Details List the details rele	vant to the cha	Raised Date 14/02/2022		Status	s ted	
T urrent Change re d Number CR 113 CR 115	quests against document Raised By Admin, PG Admin, PG	Details List the details rele Enter the details o	vant to the cha f the change re	Raised Date 14/02/2022 14/02/2022		Status Accep New	s ted	
Current Change red Number CR113 CR115	quests against document Raised By Admin, PG Admin, PG	Details List the details rele Enter the details o	vant to the cha f the change re	Raised Date 14/02/2022 14/02/2022		Status Accep New	; ted	

They may open their review line by double clicking on it, selecting the "edit review" or "complete review" buttons on the right. This will open the following window.

📓 Add/Edit Review Act	ion - SOP 60.001, SOP Title (1.1)	B	23
Target Date	28/02/2022		
Reviewed On			
Reviewer	Gribbon, Paul 🔻 …		
Outcome			
Action Required	Please review this document.		
Comment			
Comment			
			-
	[
	ОК	Cance	

The reviewer must then carry out the review, either as a group or individually and update the record in Q-Pulse with any comments they may have and a decision on whether or not an update to the document is needed. When the review has been completed, enter the appropriate date in the "Reviewed on" field to close the review. Select ok to complete.

🗿 Add/Edit Review Act	ion - SOP 60.001, SOP Title (1.1)	B	23
Target Date	28/02/2022		
Reviewed On	16/02/2022 🔤 🔯		
Reviewer	Gribbon, Paul 👻 …		
Outcome	Change Required		
Action Required	Please review this document.		-
Comment	Details of the review.		^
			-
	L		
	ОК	Cancel	

Once this field has been completed, the output of this will be displayed on the main document review screen.

tcome dew Owner A	Admin, PG	Ψ Ψ					
dew Owner A	Admin, PG						
nment	Admin, Po						
ment			_				
			v				
eviewers							
arget Date	Reviewer	Action	Comment	0	utcome	Review On	
8/02/2022	Gribbon, Rad		Details of the revis	ew. d	hange Required	16/02/2022	
	(and any rade	Please review this document.				2010 CLEVEL	Q S
	(and de la rate	Please review this document.				- and	4 1 1
irrent Char	nge requests against document	Please review this document.					# #
urrent Char	nge requests against document	Please review this document.		Raised Date		Status	
urrent Char Jumber R 113	nge requests against document Rained By Admin, PG	Please review this document. Details List the details rele	evant to the cha	Raised Date 14/02/2022		Status Accepted	0 6 10

Once all of the reviews have been completed by the assigned reviewers or a designated deadline has passed, the document/review owner is then able to consider all the returned information from the reviewers and make an overall decision on the update to the document. At this stage, all that needs to be completed is a decision on whether or not to update the document. The review owner will complete the remaining fields, completing a reviewed on date, outcome of "Change Required" or "Change Not Required" and comments on the final outcome of the review.

riewed On	23/02/2022							
come	Change Required	9						
iew Owner	Admin, PG		•					
nment	Document Owne	er Comments		•				
eviewers								
Farget Date	2	Reviewer	Action	Comment		Outcome	Review On	
				Details of the second	iew	Change Required	16/02/2022	
28/02/2022	2	Gribbon, Paul	Please review this document.	Details of the revi			10/02/2022	2 4 1
28/02/2022	ange requests	Gribbon, Paul	Please review this document.				10/02/2022	2 3 10
urrent Cha	ange requests	Gribbon, Paul against document	Please review this document.				Chable	2 3 1 1 1 1
28/02/2022 urrent Cha Number TR 113	ange requests a	Gribbon, Paul against document Raised By Admin. PG	Please review this document.	evant to the cha	Raised Date		Status	2 3 1 1 1
Surrent Cha Number CR 113 CR 115	ange requests a	against document Raised By Admin, PG Admin, PG	Please review this document. Please review this document. Details List the details rel Enter the details of	evant to the cha of the change re	Raised Date 14/02/2022 14/02/2022		Status Accepted New	

If a change to the document is required, the Document owner will update the master copy of the document and go through the usual processes of engaging relevant stakeholders before releasing a new draft for approval. If the outcome is that no change is required, this will be recorded in the record and this will then extend the review date of the document to the standard review increment for the document type. The default is 3 years, however this can be updated as required.

6.4. Scheduled Review

The process described above will be used for both Schedule and Unscheduled Reviews, the only difference will be that Scheduled reviews will be managed and alerted in advance by the Quality Assurance Manager or the appropriate designee.

6.5. Unscheduled Review

In the event of an unscheduled review, this will be managed on a case by case basis and may be prompted as a result of external audits or the raising of a Change Request. The same process of creating a review record will be followed.

7. Read and Comprehend

As described in SOP 50.023, the requirement for Staff to Read and Comprehend certain SOPs associated to their Staff Category is detailed within each SOP. This is reflected and recorded in Q-Pulse as each staff member will be issued with the relevant SOPs to Read and acknowledge they comprehend its contents through Q-Pulse.

This has been mentioned previously in Section 2 and 3 and only appears as an option for Active documents or when documents are being made active. The records relating to this for Active documents can be found under the "Distribution" tab.

	(1.0) - Documents Det	tails - Q-Pulse				0	۵	23
File Edit Vi	iew Actions Wind	low Help						
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Warning	g: Where this icon app	ears, refer to the tooltip	for more information.					
Туре	SOPs		 Number 	SOP 51.037	Revision 1.0			lŕ
Title			Status	Active			\$	l
TICK			50003	heave			^ 	4
Owner	r	• ··· Active D	ate 03/03/2022	📑 🔯 🛛 Filena	ame SOP 51.037 v1.0		••••	
Author	r I	• ··· Review D	ate 03/03/2025	🔄 🔯 Keyw	ords			
Change	e Details First Relea	se						
change							-	
Distrib	bution					A	*	l
							~	1
Copyholders	s Notified Only						2	
Copyholders Number	Notified Only	Dept/Organisation	Comment	Distribution Date	Acknowledged Date		2 2	
Copyholders	Notified Only Name	Dept/Organisation	Comment	Distribution Date 24/03/2022 09:41	Acknowledged Date		2 4 2	
Copyholders	Notified Only Name Ω Ω	Dept/Organisation	Comment	Distribution Date 24/03/2022 09:41 24/03/2022 09:41	Acknowledged Date		21 24 27 24	
Copyholders	Notified Only Name Ω Ω Ω Ω	Dept/Organisation	Comment	Distribution Date 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41	Acknowledged Date		2 2 2 2 2 2	
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Copyholders	Notified Only Name Ω	Dept/Organisation	Comment	Distribution Date 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41	Acknowledged Date		2 2 4 2 2 2 2 4 3 3 3 3 3 3 3 3 3 3 3 3	
Copyholders Number	Notified Only Name 只	Dept/Organisation	Comment	Distribution Date 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41	Acknowledged Date		 ▲ ↓ ↓	
Copyholders Number	Notified Only Name 只	Dept/Organisation	Comment	Distribution Date 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41	Acknowledged Date Acknowledged Date 06/04/2022 10:28 08/06/2022 20:54 06/04/2022 10:52		2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	
Copyholders Number	Notified Only Name Ω Q Q Q R Q	Dept/Organisation	Comment	Distribution Date 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41	Acknowledged Date		2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	
Copyholders Number	Notified Only Name 只 P Requests	Dept/Organisation	Comment	Distribution Date 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41 24/03/2022 09:41	Acknowledged Date			

As can be seen in the example above, a list of staff will have a record of the document having been distributed to them and a record of when they have acknowledged they have read this document.

Reports are run centrally by the Quality Assurance Manager or the appropriate designated authority to ensure staff are responding in a timely manner as well as automated reminders being sent by Q-Pulse.

In the event a document is to be added as new or update which changes the staff groups associated to the SOP, this will be reflected in the records by the Quality Assurance Manager or the appropriate designee at this time which is detailed in Section 2 and 3.

In the event new members of staff join R&I or change role within, the Quality Assurance Manager or the appropriate designee must be notified to ensure they are set up with the appropriate Q-Pulse account and the correct documents distributed.

7.1. Responding to Read and Comprehend Action

When a document is distributed, an E-Mail will be sent to all Copyholders and Notified individuals. This will include a file to locate the record in the desktop application and a link to open the record in the web version.



Documents which require acknowledgement can also be identified without receiving an E-Mail by opening the Q-Pulse application and then opening the Documents Module from the front Launch Pad.



This will then open a new window for the documents module, in the top left hand corner of this window the actions associated with your account will be listed.



A number of different actions may be displayed and the numbers to complete for each will appear in brackets beside, in this instance it is the "To Acknowledge" action which is of interest. Double click on this to perform a search which will return a list of all documents to acknowledge.



When the search completes and the documents are listed, each record can be opened by double clicking on the line or the document itself can be downloaded and opened by clicking on the title which will appear in blue underlined text.

You will then need to acknowledge receipt of the document, when you open the record for the document in Q-Pulse you then expand the "Distribution" tab, highlight your name and on the right hand side there will be a button to acknowledge receipt.



Once this has been clicked, an acknowledgement date will appear beside your name.

🧾 SOP 50.019 (1	1.0) - Documents Details	- Q-Pulse				- 0	23
<u>F</u> ile <u>E</u> dit <u>V</u> iev	w <u>A</u> ctions <u>W</u> indow	<u>H</u> elp					
1 - 1	🔒 💩 🙍	& 🦻 🖳	🚑 🚑 🗊 🗊	🕐 🝷 🕐	00		
Туре	SOPs		 Number 	OP 50.019	Revision 1.0		Î
Title	Test SOP		Status	Active			*
Owner	Gribbon, Paul	• ··· Active Dal	e 07/10/2019	🗐 🔯 🛛 Filenam	e SOP01 006 v10 0 dr	<u>aft</u>	
Author	Gribbon, Paul	• ··· Review Dat	e 07/10/2021	🔄 🔯 🛛 Keyword	s		
Change I	Details First Release					*	
Distribu	ltion					:	* ≡
Copyholders	Notified Only					â	2
Number 🔺	Name	Dept/Organisation	Comment	Distribution Date	Acknowledged Date	2	ф
	요 Admin, PG	Research Governa		07/10/2019 11:50	07/10/2019 11:51		
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Change	Requests					:	÷
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Alternatively, if you wish to acknowledge a document through the web portal it can be done by following the web link in the email notification. This will open the document record which will look similar to that shown below.

If you do not have the email as a reference, by opening the web portal version the front screen should display the actions associated to your account in the way shown below.



My Actions			
	Documents		
	To Acknowledge	<u>(1)</u>	
·	To Distribute	(5)	
	To Review	(2)	
	Change Requests - To Action	(1)	
	CA/PA		*

To open the list of documents to acknowledge, click on the number which appears in brackets beside the action to open a new window.

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This will then return a list of documents, from here you can download and open the document by clicking on the title which appears in blue underlined text and when you have read and understood the content select the button to acknowledge on the right hand side.



This will open a window to confirm acknowledgement of the document.

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Alternatively, the individual document record can be opened by selecting the open button on the right hand side of the listing. This would be the process if you have followed the link from an email.



When the document record is open, on the top right hand side there is a button which allows you to acknowledge receipt, press this once the document has been reviewed and understood.



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Once you press this button, a window will display to confirm you have acknowledged the document.



8. Related Documents (QA)

SOPs, Forms and Guidelines can be interconnected in their nature and reference other processes. This relationship which is detailed in SOP section 6,.Referenced Documents, can then be represented within Q-Pulse by forming these links.

This action will be taken by the Quality Assurange Manager or the appropriate designee, to achieve this, during the release of a new SOP or update of an existing SOP detailed in section 2. and 3, the properties tab of the document can be expanded and the document properties option selected.

SOP 51.037 (1.0) - Documents Details - Q-Pulse		- 0 %
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This will open a new window which has a number of different options in which associations can be formed to the document. In this instance it is the "Related Documents" option which is of interest, select this option to change the displayed screen.

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In this screen there is the ability to "Add" a link to another document, this allows to link any document held in Q-Pulse to this document record.

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By selecting Add, a new window will open and allow you to search based on a keyword which can be the document number or title.

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		SOF	P 50.011	Setting up Researc	CHAPTER\50 Gene
		SOF	P 50.016	Development of ne	CHAPTER\50 Gene
		SOF	P 50.001	NHS Greater Glasg	CHAPTER\50 Gene
		SOF	P 50.013	Setup and mainten	CHAPTER\50 Gene
		SOF	P 50.017	Clinical Research &	CHAPTER\50 Gene
		SOF	P 50.018	Clinical Research &	CHAPTER\50 Gene
		SOF	P 50.006	Registration of Bio	CHAPTER\50 Gene
		SOF	P 22.050	Recording Pharma	CHAPTER \22 NHS
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		SOF	P 50.021	Participant recruit	CHAPTER\50 Gene
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From the presented list of options, select the relevant SOP, Form or Guideline to add this link.

This process can be repeated as many times as is required to form all the appropriate links. With these links in place, it will allow you to view all the associated documents to an SOP when it is undergoing review and help to manage the potential ripple through impact of any changes.

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9. Change of Ownership (QA)

There may from time to time be the requirement to change the ownership of a document if this happens outside of the normal review period of the document the record can be updated to simply change the "Owner" field over to the new name based on the rules set out in SOP 51.023. This must be completed by the Quality Assurance Manager or an Appropriate Designee.

In the event that the Author and Ownership are to be changed, these fields will be updated during the review process of the document as detailed in Section 3. by the Quality Assurance Manager of the appropriate designee.

Document Details

Prepared by: Paul Gribbon	Signed	Date
Approved by: Caroline Watson	Signed	Date

Document History

Version	Date	Description
1.0	25/08/2022	First Release

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