# 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"

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New	•	Document +	Active Document	Ctrl+N
Open Document Record	Ctrl+O	Revision +	Draft Document	Ctrl+Shift+N
View Document			Based On Selected	
<u>Print</u>	Ctrl+P			
Pre <u>v</u> iew				
Report Designer				
<u>Report Designer</u> <u>1</u> FORM 51.015A (3.0)				
1 FORM 51.015A (3.0)				
1 FORM 51.015A (3.0) 2 SOP 01.002 (3.0)				
1 FORM 51.015A (3.0) 2 SOP 01.002 (3.0) 3 SOP 51.015 (4.0)				

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.

) New Documents - Documents	-				0	۲
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🚣 Approval						
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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.

	Actions Window Help			
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Туре		• Number	Revision 1	
Title	tio-Repository		-	
	<ul> <li>CHAPTER.</li> </ul>			
Owner	<ul> <li>01 GTCU General Management</li> </ul>	CHAPTER\		
Author	Forms	CHMPTER(p1 GTCU General Management)		
	Guidelines	CHAPTER/01 GTCU General Management/		
Change	SOPs	CHAPTERUD1 GTCU General Management/		-
	> 17 Clinical Research Fadility	CHAPTER \		~
	> 21 NHS GG8C Pharmacy - Sponsor IMP Mana.	CHAPTER\		
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	> 23 NHS GG&C Pharmacy - Hosted Non-CTIMP	CHAPTER\		
Change	> 24 Safe Haven	CHAPTER\		
	> 50 General	CHAPTER\		
Review	> 51 Sponsor R&D	CHAPTER.\		
Revisio	> 52 Hosted R&D	CHAPTER\		
REVISIO	> 53 Sponsor Governance	CHAPTER\		
Propert	54 Hosted Governance	CHAPTER)		
	> 55 Sponsor Pharmacovigilance	CHAPTER\		
	> 55 Sponsor Project Management	CHAPTER \		
	> 57 NHS GGBC Clinical Research Eaclity- Admi.	. CHAPTER)		
	> 58 Clinical Research Imaging Fadility	CHAPTER		
	> 59 West of Scotland Safe Haven	CHAPTER	-	
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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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Title Status		\$
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Change Details		4
🛃 Approval		×
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Review History		×
Revision History		×
V Properties		×
Modified		
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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.

2 New Documents - Documents Details - Q Pulse													83
Ele Edit View Actions Window Help													
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Title Title													
Owner Admin, PG + Implement By Date					<b>R</b> 13	1		Filename					
Author Admin, PG v					ember								
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Review History		29	30	21	25	- 26	- 4	5				-	8
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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	• %
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12 · III 🔒 🕹 🖉 (16 B) 🚨 🕨 🛎 🗏 📂 🤣 🕲 🔘		
Type SOPs * Number SOP 51.037	Revision 1.0	
Title Main Status		
Owner Admin, PG 🛛 🐨 Implement 24/01/2022 🕞 🖾 Filename		
Author Admin, PG = ··· Keywords		
Change Details		4 4
2 Approval		¥
Change Requests		×
Review History		×
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Sy Properties		¥
Modified		

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	<ul> <li>Delete original file(s)</li> </ul>	
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	8
Ele Edit View Actions Window Help			
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Title Title Status			l
Owner Adnin, PG v w By Date 24/01/2022 B B B Filename Testing			1
Author Admin, PG 💌 🚥 Keywords			
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Sy Properties		¥	j
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 (						-	-
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Type SOPE		*	Number SOP 51.	137	Revision 10		
Title Title			Status Draft				
Owner Admin, PG		By Date 24/01/	2022 📃 🕅	Filename			
Author Admin, PG				Keywords			
Change Details	leesse						1
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Responses Comments							
Approver	- Response				Date		
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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	13
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.

Type Title	SOPs			Number SOP 51.03 Status Draft		tsion 1.0	*
Owner	Admin, PG Admin, PG	* *	Implement 24/01/2 By Date		Filename Tes	ting (	-
ot submitt Responses pprover Cribbon Admin, F	Commente .	Response			De	te	4 4× ■ ■
Change	Requests						¥

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 Workflaw	22 S
1. Gribbon, Paul	
1. Admin, PG	
- Transla	
īgsert	1
	OK Cancel

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

Edit Workflow	ନ ଅ	3
1. Gribbon, Paul		1
2. Admin, PG		
		J
Igert	• • I I	
	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.

Submit For Approval Wizard - SOP	51.037, Title, Rev 1.0	23
ů	Welcome to the Submit for Approval Wizard	
Pulse	This wizard will help you with the process of submitting the document for approval.	
<b>4</b>		
	< <u>Back</u> Cance	4

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.	will
After Finish - Display Details of the Document	
< <u>B</u> ack <u>F</u> inish Can	ncel

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.

GOP 51.037 (1.0) - Documents D	letails - Q-Pulse								0	
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Warning: Where this icon a	ppears, refer to th	he tooltip for	nore informa	stion.						
Type SOPE			-		SOP 51.037			1.0		
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Approval					_					_
	28 by Admin, P	5								_
Submitted: 18/11/2021 10:	28 by Admin, P	5								_
Submitted: 18/11/2021 10: Responses Comments		5					Date		_	_
Submitted: 18/11/2021 10: Responses Comments	28 by Admin, PO	5					Date	_		
Submitted: 18/11/2021 10: Responses Comments Approver		5					Date			
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Submitted: 18/11/2021 10: Responses Comments Approver • Gribbon, Paul Admin, PG		5					Date			
Submitted: 18/11/2021 10: Responses Comments Approver - Gribbon, Paul Admin, PG Change Requests		5					Date			
Submitted: 18/11/2021 10: Responses Comments Approver • Sinbbor, Paul Admin, PG Change Requests Review History		5					Date			

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.

21	Approval Respon	se	B	23
	Response	T		
	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.

) SOP 51.037 (1.0) - Documents Details - Q-Pulse						-	
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Warning: Where this icon appears, refer to the tool tip for more information.							
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Title Title Status	Draft						1
Owner Admin, PG Implement 24/01/2022		Filename	Testing				1
Author Admin, PS To By Date Provide State		Ceywords				ĩ.,	
Change Details Prst Release		ic) in or of the					
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Approval					A	8	h
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Responses Comments Approver   Response			Date 18/11/202	21 10-20-0	30 b	at a <b>X (*</b> ) 🔺	
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Approver Response  Gribbon, Paul Accept  Accept  Change Requests  Review History			18/11/202		0 b	回 ▲ 派 回 ×	
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Responses     Comments       Approver <ul> <li>Response</li> <li>Gribbon, Paul</li> <li>Accept</li> <li>Admin, PG</li> <li>Accept</li> <li>Change Requests</li> <li>Review History</li> <l< td=""><td></td><td></td><td>18/11/202</td><td></td><td>D b</td><td>回 ▲ 派 回 ×</td><td></td></l<></ul>			18/11/202		D b	回 ▲ 派 回 ×	

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



#### Guideline 50.023A - Version 1.0

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
< <u>B</u> ack	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
<b>Confirm Revision Details</b> This revision will become active. Please confirm the details below:	
Revision 18/11/2021 Change Details	
First Release	
< <u>B</u> ack <u>N</u> ext >	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.

Activate Documen	t Wizard - SOP 51.037,	Title, Rev 1.0	23
Confirm Dis Add peo created:	ple who must acknowl	edge the fact that this new revision has been	
Copyholders Copy No 🔺	Notify Only Copyholder	Department/Organisation	2 2 2
			Å
Automatica	lly distribute record on a		Cancel

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

Activate Document Wizard - SOP 51.0	37, Title, Rev 1.0	23
e e e e e e e e e e e e e e e e e e e	Results Summary Please review the wizard summary before finishing.	
S S	Rev 1.0 will be made Active A place holder has been specified for the currently Active revision, no move required.	*
6	After Finish - Display Details of the Document	
	< <u>B</u> ack <u>F</u> inish Cance	

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			-	umber SOP 51.0 Status Active	)37	Revision 1.0	
Owner Admin, PG Author Admin, PG Change Details First	v v Release	Active Date Review Date		<b>1</b> 2 <b>1</b> 3	Filename Keywords		
Distribution							
Change Requests							
Review History							
Approved By							
All responded							2 2
Responses Comments Approver	<ul> <li>Response</li> </ul>					Date	
2 Gribbon, Paul	Accept					18/11/2021 10:25	E00 b
👗 Admin, PG	Accept					18/11/2021 10:29	,
							- 11

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.

Q LaunchPad <admin, pg=""></admin,>		- 22
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Dideagon		
ideagen		
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		*
		<b>Q</b> -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.

File Edit View Actions Win	dow Help			
🛅 • 📇 🎟 📚 💋	Register: Active	•	🖬 🖪 🖻 · 🚺 🖳 🕲 ·	IB 🚣
My Actions <	Document Number		Revision	Active Date
No Actions to display.	SOP 60.001	SOP Title	1.1	14/02/2022
Search	1			
Any -				
Owner				
Any -				
Keywords				
Advanced 🔑 Search 😭 X				
🖉 My Searches				
🖀 My Folders				
📲 Related Documents				
*				

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) a	ustom Filter - Documents List - Q-Pu	ulse				- 0 %
File	Edit View Actions Window	w Help				
1	New	•	Document >	- 📑 📑	) • 🚺 🖳 🕐 💷	4
8	Open Document Record	Ctrl+O	Revision 🕨	Draft (Using Approval)	Revision	Active Date
	View Document		SOP Tit	Active	1.1	14/02/2022
2	Print	Ctrl+P				
2	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					
> @	Annced $\swarrow$ Search $$ × Search My Searches My Folders Related Documents					
	• 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	-	B 53
File	Edit View Actions			
1	New +	Document 🕨 📃 🔔 🤮 🗃 💷 🤁 - 📮 🗇 🌀 🕥		
	View Document	Bevision   Draft (Using Approval)		
5	Save Ctrl+S	Active	_	
	Save and Close			
&	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	SOP 60.001, SOP Title	23
<b>O</b>	Welcome to the Revise with Approval Wizard	
<b>Q</b> -Pulse	This wizard will assist in revising the selected Document Revision by following the Q-Pulse Draft Approval Process	
	< Back Next > 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
<b>Confirm Draft Document Details</b> Confirm the details of the new draft document:	
Type SOPS  Vumber SOP 60.001	
Revision 1.2	
Title SOP Title	
< <u>Back</u> <u>Next</u> Ca	ancel

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
	2W
Details	Implement
Enter the details of the change request here	
< <u>B</u> ack <u>N</u> ext >	Cancel
	Enter the details of the change request here

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 will	be responsible for approving this draft:	
Approver		1 2
Approver 1		
Approver 2		
Approver 3		
7 When equiled a demokrative		
<ul> <li>When created, automatically st</li> </ul>	ubmit 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 🖨 🖨	Î	
( 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
<b>Specify New File</b> 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
	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.	A
	After Finish - Display Details of the Document	-

### Guideline 50.023A - Version 1.0

This will open a new window with updated document record.

📓 sor	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			
	- 💷 🔚 📚 🙆 注 🖹 🌲 🕨 🚢 💷 💋 🤜 🔘 🎯			
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 v ··· Keywords test			
	Change Details		+	
2	Approval	Δ		*
	Change Requests	(1)		*
5	Review History			*
6	Revision History			*
٩	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.

Revision	Thistory			^
	▲ Status	Change Details	Active Date	
1.0	Obsolete	First Release	14/02/2022	<b>a</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	2
<u>File Edit View Actions Window H</u> elp	
12 · III 🔒 🗟 🎽 🕌 🏯 🕨 🚢 🖬 📴 🥪 🎯 🎯	
A Warning: Where this icon appears, refer to the tooltip for more information. View Approval History	
Type SOPs View all approval history Number SOP 60.001 Revis	on 1.0
Title SOP Title Status Draft	*
Owner Implement 01/03/2022 I Filename SOP	0.001
Author v ···· Keywords test	
Change Details First Release	A
	Ψ
2 Approval	<b>*</b> ≡
Submitted: 14/02/2022 10:37 by Admin, PG	<b>a</b>
Responses Comments	🔏 🗌
Approver A Response Date	
2 Approver 1	
2 Approver 2	3
2 Approver 3	
	「」「」
	1
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	oly all   🗸 📋 D	elete 🛇 Junk Block …			
Docu	iment Awaitir	ng Approval			
0	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:	Aggc-apps.scot.nhs.uk 📓 🖬 🖒 ⁵ 37	∽ -	÷	•
	ATT0000 346 bytes	1.bin V ATT00002.bin V Locate Record.qpulse V			
	3 attachments (36 KB)	Save all to OneDrive - NHS Sociand Download all			- 1
	Coreater Glasg and Clyde	Approval of New Document			
	been released for	this E-Mail as you are a nominated approver for a document on Q-Pulse which has approval. oval for this document, you can follow the links attached in this E-Mail,			
	For detailed guida	ance, step by step instructions can be found here:			- 1
	Unorthnet-11/wg-re	nearch' common 2. Governance' Quality' Q-Pulse Guides' Document Approval			- 1
	Number	SOP 60.001			- 1
	Title Revision	SOP Title			- 1
	Owner	1.0			- 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	cuments Details - Q-Pulse								23
Eile	<u>E</u> dit <u>V</u> ieuv	Acti	<mark>ans ∭</mark> indow <u>H</u> elp	_							
1	- ==	۵.,	Add Copyholders	II. 🔍	. 🔍 🗉	🕐 - 🕻	<b>7</b> 🌮 🤅	0			
		2	Add Notified Only		-						_
	Туре 😒	n	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> </u>	Filename	SOP01.006_V	10.0 draft .		
	Author G		Rei <u>n</u> state Document	ew Date	07/10/2021	<b>X X</b>	Keywords				
	Change De	Е.	Add Change Request								
		+	New Action							÷	
		1	Complete Action								
	Distributio	1	Reopen Action	_							¥
	Change Re	Ē	New Regiew								×
ſ	Review His	2	Add App <u>r</u> overs								×
		ą	Add Note								
	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
<b>De-Activate Document</b> 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					
Results Summary Please review the wizard summary before finishing.					
Rev 1.0 will be made Obsolete	*				
After Finish - Display Details of the Document					
< <u>B</u> ack <u>Einish</u> 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
Type     SOPs     Number     SOP 50.019     Revision     1.0       Title     Test SOP     Status     Obsolete     Image: Sop 50.000 videoutle for the sop 50000 videoutle for the source for the s
Intle         Test SOP         Status         Obsolete           Dwner         Grbbon, Paul         * ···         Active Date         07/10/2019         Image: Constraint in the c
Owner         Gribbon, Paul         *         Active Date         07/10/2019         Image: Comparison of the comparison of
Author Gribbon, Paul Obsolete 07/10/2019 10:20 Keywords
Distribution :
Change Requests
Review History
Revision History :
🚣 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
To: Gribbon, Pau Co:	ggo-apps.scot.nhs.uk / ()]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>lse 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,>		- 23
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(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.

🗿 Custon Filter - Documents l	ist - Q	Pulse					⊡	53
Eile Edit ⊻iew Actions	Win	low <u>H</u> elp						
🛅 · 🚰 🔠 📚	2	Registen Active *		📕 🦉 · 💷 🚢				
Hy Actions	<	Document Number	▲ Document Title		Revision	Active Date		
No Actionsto display.		SOP 60.001	SOP Title		1.0	14/02/2022		
Search								
Туре Алу	+							
Owner								
Any	Ŧ							
Keywords	•							
		***						
Advanced 🔑 Search 🖡	Ç ×							
🔎 Search								
🔏 My Searches								
🚔 My Folders								
🛫 Related Documents	÷							
Record(s) Found: 1		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	- · · · · · · · · · · · · · · · · · · ·	. 🛃 · 💷 🚠		
Hy Actions c	Document Number	Document Title		Revision	Active Date
No Actions to display.	SOP 60.001	Open Document Record Ctrl+O		1.0	14/02/2022
		View Document			
Search		New Document Based On			
Туре		Add Change Request			
Any *		View Change Request History			
Owner		E New Review			
Any *		<u>Revise Document</u>			
Keywords -		💪 Add Copyholders			
		Add Notified Only			
		Distribute Document			
		Acknowledge			
		o Deactivate Document			
		Add Ngte			
		View/Edit Properties			
Advanced 🔑 Search 🙀 🗙		Add Documents to 'My Folder'			
Search	1	Remove Documents from 'Mg Folder'			
-		📡 Delete 🕨			
🔏 Hy Searches					
🙆 My Folders					
🛫 Related 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.

File Edit View Actions Window Help     Image: Where this icon appears, refer to the tooltip for more information.     Type SOPs     Number     Sop Title     Status     Active Date     14/02/2022     Filename     SOP 60.001     Revision     1.0     Type SOPs     Number     Sop Title     Status     Active Date     14/02/2022     Filename     Sop 60.001     Revision     1.0     Title   Sop Title   Status   Active Date   14/02/2023   Image: Distribution     Image: Status   Review Date   14/02/2023   Image: Distribution     Image: Status   Review Date   14/02/2023   Image: Distribution     Image: Di	
Image: Sope in the second appears, refer to the tooltip for more information.     Type: Sops   Image: Where this icon appears, refer to the tooltip for more information.     Type: Sops   Image: Sope information     Sope information     Title: Sope information     Sope information     Title: Sope information     Sope in i	23
Warning: Where this icon appears, refer to the tooltip for more information.         Type       SOPs         Varning: Where this icon appears, refer to the tooltip for more information.         Type       SOPs         Title       SOP Title         Status       Active         Author       Gribbon, Paul         Author       Gribbon, Paul         Title       SOP 60.001         Review Date       14/02/2022         Title       SOP 60.001         Author       Gribbon, Paul         Title       SOP 60.001         Author       Review Date         14/02/2023       Keywords         Title       Sop 60.001         Title       Sop 60.001         Author       First Release         Title       Distribution         Title       Sop 60.001         Title       Sop 60.001         Title       Sop 60.001         Title       Change Change	
Type       SOPs       Number       SOP 60.001       Revision       1.0         Title       SOP Title       Status       Active       *         Owner       Gribbon, Paul       *       Active Date       14/02/2022       Image: Sop 60.001       *         Author       Gribbon, Paul       *       Active Date       14/02/2023       Image: Sop 60.001       *         Author       Gribbon, Paul       *       .       Review Date       14/02/2023       Image: Sop 60.001       *         Author       Gribbon, Paul       *       .       Review Date       14/02/2023       Image: Sop 60.001       .       .         Change Details       First Release       .       .       .       .       .         Image: Change Requests       .       .       .       .       .       .       .         Number       Status       Raised By       Details       Raised Date       .       .       .         Add       .       .       .       .       .       .       .       .         .       .       .       .       .       .       .       .       .       .         .       .       . <td></td>	
Title Status Active   Owner Gribbon, Paul •••• Active Date 14/02/2022 Image: Sop 60.001   Author Gribbon, Paul •••• Review Date 14/02/2023 Image: Sop 60.001   Author Gribbon, Paul •••• Review Date 14/02/2023 Image: Sop 60.001   Author Gribbon, Paul •••• Review Date 14/02/2023 Image: Sop 60.001   Author Gribbon, Paul •••• Review Date 14/02/2023 Image: Sop 60.001   Change Details First Release Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001   Distribution Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001   Distribution Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001   Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001   Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001   Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001   Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001   Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001   Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001   Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 Image: Sop 60.001 <td></td>	
Owner Gribbon, Paul   Author Gribbon, Paul   Image: Details First Release   Image: Distribution   Image: Distribution <t< td=""><td></td></t<>	
Author Gribbon, Paul   Author Gribbon, Paul   Change Details   First Release     Distribution     Change Requests     Number   Status   Raised By        Details     Raised Date     Author	
Change Details First Release	
Distribution     Change Requests     Number     Status     Raised By     Details     Raised Date     Addition	
Distribution     Change Requests     Number     Status     Raised By     Details     Raised Date     Addition	
Change Requests       Raised By       Details       Raised Date         Number       Status       Raised By       Details       Raised Date	
Number     Status     Raised By     Details     Raised Date       Image: Add to the state     Image: Add to the state     Image: Add to the state	11
Ad	
Ad	
	dd Ch
	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	:)		8 X3
Details				
				<b>^</b>
				<b>_</b>
Supporting informati	on			
				•••
Confirm raise inform	ation			
Raised by	Admin, PG	<b>~</b>		
Raised Date	14/02/2022			
Severity	2 - Medium	-		
			ок	Cancel

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.

📓 SOP (	60.001(	1.0)	- Documents Deta	ails - Q-Pulse								_		23
<u>File</u>	dit <u>V</u> ie	w	Actions Wind	ow <u>H</u> elp										
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	Туре	SOF	Ps			•		SOP 60.00	01	Re	vision 1.0			ĥ
	Title	SOF	P Title				Status	Active						
	Owner	Grib	obon, Paul		Active Date	14/02/202	22		F	ilename S	OP 60.001	·	••	
A	Author	Grib	obon, Paul	* R	eview Date	14/02/202	23	<b>B</b>	К	eywords te	est			
C	Change	Det	ails First Releas	e								4		
	Distribu	itio	n									A	¥	
	Change	Re	quests								(1)		*	
Num	ber	•	Status	Raised By	Deta	ils					Raised Date		I,	
			New	Admin, PG	List t	he details re	levant to the	change rea	quest.		14/02/2022		<b>I</b>	
													×	
													5	
														1
1	Review	His	tory										¥	j.

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

Number 🔺	Status	Raised By	Details	Raised Date	щ,	
CR113	New	Admin, PG	List the details relevant to the change request.	14/02/2022	ا 🎝	
					<b>R</b>	

## 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	<b>+</b>	Raised Against Revision	1.0		]
Severity	2 - Medium	-	Raised Date	14/02/2022	<b>e</b>	
Details	List the details relevant to the	e change r	request.		*	
					×	
Attachment		•••	Implement By			
Owner	Gribbon, Paul	<b>+</b>	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 A	Documents Details - Q Actions Window							
		efer to the tooltip form		- 🖳 🤅	00			
Type SOP	5			-	Number SOP 60.001		Revision 1.0	
Title SOP	Tide				Status Active			
	Gribbon, Paul	····	Active Date	14/02/2022	3	Filename	SOP 60.001	
Owner	Gribbon, Paul		receive bace					
Author	Gribbon, Paul Gribbon, Paul Je Details First Rele	*	Review Date			Keywords	test	
Author Chang	Gribbon, Paul Je Details First Rele	*				Keywords	test	
Author Chang	Gribbon, Paul ge Details First Rele	*				Keywords	test (1)	
Author Chang Distribution Change Req	Gribbon, Paul ge Details First Rele	*				Keywords		
Author Chang Distribution	Gribbon, Paul pe Details First Rele puests	252	Review Date			Keywords	(1)	4
Author Chang Distribution Change Req Jumber	Gribbon, Paul ge Details First Rele geests	ase Raised By	Review Date	14/02/2023		Keywords	(1) Raised Date	

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
	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)		ß	23
Number	CR113	Status	Accepted	-
Raised By	Admin, PG 🛛 🔻 \cdots	Raised Against Revision	1.0	
Severity	2 - Medium	Raised Date	14/02/2022 🔤 🖸	3
Details	List the details relevant to the char	ge request.	A	•
				r
Attachment		Implement By		3
Owner	Gribbon, Paul 🔻 🕶	Implemented In Revision	1.1	-
Response Comment				
			OK Cance	

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,>		0	23
		ij - 🤱 - 🔮	. (
Dideegen			
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Modules	Workload	Analysis	
СА/РА		¥	Â
Audit and Monitori	ng	¥	
Documents		*	
New			
Recently Viewed			
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SOP 60.001		P ==	_=
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Training Courses		¥	
🚰 Sites		¥	
Assets		¥	
• Occurrences		¥	
Incidents		¥	-
		🕐 Q-Pul	se <sup>,</sup>

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				- • ×
File Edit View Actions Wind	low Help				
🛅 • 📇 🎩 📚 🧖	Register: Active	•	💽 📑 🔁 📄 ·	· 🚺 🖳 🕐 -	≡₽ 🚢
My Actions <	Document Number	✓ Document Title		Revision	Active Date
No Actionsto display.	SOP 60.001	SOP Title		1.1	14/02/2022
Search					
Type Any					
Owner					
Any					
Keywords					
	•				
Advanced 🔎 Search 😱 🗙					
🔎 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/Qr	
	.::

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

83
:
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 2<sup>nd</sup> 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
ж	

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 2<sup>nd</sup> 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 sop	0
Revision Review Date 🔻 on or before 🔻 01/01/2022 🕅 🕅 🗶 And/Or	
AND <b>v</b> Number <b>v</b> starting with <b>v</b> sop	
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 Wine</u>	dow <u>H</u> elp			
🛅 • 📇 🎩 📚 🔎	Register: Active		🛛 🖳 🕐 - 🔍 🛛	<b>1</b>
My Actions <	Document Number	✓ Document Title	Revision	Active Date
No Actions to 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	5	New Review		
Owner				
Any		Revise Document		
Keywords	l 4	Add Copy <u>h</u> olders		
60.001		Add Notified Only		
Advanced 🔎 Search 🙀 🗙	E	Distribute Document		
🔎 Search	:	Ac <u>k</u> nowledge		
· ·	3	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 2<sup>nd</sup> 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								
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4	Warning: Wł	2	Add Notified Only Distribute Document		ore informatio						
	Type 50	11 10	Acknowledge		v	Number SOP 60.001		Revision 1.	1		
	Title 🚾	1500	Deactivate Document		-	Status Active					*
	Owner Gr	-	Reinstate Document	ive 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	
R	Distributio	4	Reopen Action								¥
	Change Re		Add Approvers							-	×
	-		Add Approvers						(1)		=
	Review Hit	ò	View/Edit Properties								×
	Revision H	istor		1							¥
2	Approved	By							4	7	×
3	Properties										¥
											.::

The 3<sup>rd</sup> 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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- 33	<u></u>	
- 31	E	
- 31	51	
- 35		

🔄 so	P 60.001 (1.:	1) - Documents Det	ails - Q-Pulse								- 0	23
		Actions Wind										
	-	8 🕹 💋	2. 6	7 📮 名	<b>.</b> 🚑 🗉	i IV	🕐 - 📮	۵	0			
4	Warning: W	/here this icon app	ears, refer to	the tooltip for	more inform	ation.						
	Type S	OPs			-		SOP 60.001			1.1		
	Title 💈	OP Title					Active					٤
	Owner G	ribbon, Paul	·	Active Date	14/02/2022	2		Filename				
	Author G	ribbon, Paul		Review Date	14/02/2023	}		Keywords	test			
	Change De	etails										
	Distributi	ion									*	•
	Change R	lequests								(1)	*	۶
1	Review H	listory									\$	•
Re	evision	Reviewed On 🔻	Performed B	y C	Outcome	Com	iment				5	
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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							
		*					
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\$							
te	Reviewer	Action	Comment		Outcome	Review On	<u>_</u>
							<u>م</u>
hange requests a	gainst document						
	Raised By	Deta	ils	Raised Date	St	atus	<b>I</b> ,
	Admin, PG	Ente	r the details of the change re	14/02/2022	Ne	ew	
t	e	Reviewer	Reviewer Action	s Reviewer Action Comment Thange requests against document Raised By Admin, PG List the details relevant to the cha	s Reviewer Action Comment Comment	s Reviewer Action Comment Outcome	s Reviewer Action Comment Outcome Review On Review On

## 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.

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shoutblank	
aply all   🗸 📵 Delate 🚫 Junk Black …	
riew Action added to Document	
This worder Wildpulsel leedgage approximited as inform outside your argenization. Manage worder	
V6OpulseLive@ggc-apps.scot.nhs.uk	■ □ ○ 5 5 →
Wed 16/03/2022 12:03	
Te: Gribbon, Paul	
The ATTO0001.bin V The ATTO0002.bin V	
L satisfies	
2 attachments (2010) Several to OneOffice - NIIS Sociand Download all	
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NHS	
Document Review	
Greater Glasgow	
and Clyde	
Managements describe Thild and any hear basis and a second solar described in the description of the last second	
You are recieving this E Mail as you have been added as a reviewer for the document detailed below.	
Phease review this decument to determine if any updates or changes are required to its content and recent this detail in Q Puise and share with the decument owner as required.	
Please review his decoment to determine if any updates or changes are required to its content and recent this statul in C. Pulse and share with the decument owner as required. A dutated instruction on how to complete the can be found in the link below. Therefore: They essent common 2. Generative Obtain Schleic Schles Content Aspectal	
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Press review this document to determine if any updates or changes are required to its content and record this statul in CLPNUS and share with the document avera is required.  A data led indication on how to complete the care behavior in the link below.  Insortant 31 Systematic 2. Community Statistic Statistic Research Average  Number Soft Rolling  Number Soft Rolling  Number 1.1  Residen 1.1	
Hease review this document to determine if any updates or changes are required to its content and record this statistic process the statistic process of the statistic proceses of the statistic process of the statistic process of	
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Presserve were the decompetition of any updates or changes are required to its content and record this stead in a Pruse and strain with the decompetition were donequired.       A detailed induction on tow to complete the care behavior in the link below:       Contract:StrainstateCompetition.competition.com behavior.com and a strainstate of the link below:       Instrument:Strainstate.competition.competition.com behavior.com behavior.com and a strainstate of the link below:       Number:     non- non- strainstate.competition.com behavior.com and a strainstate.com and a strainstate of the link behavior.com and the link behavio	
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Proze review this decompetition determine in any sophiates or changes are required to its content and record this decamped and Privac and Share with the decompetitive as required.  A defailed instruction on tow to complete the care believed in the link below  Toestates There execution and a Complete the care believed to the decompetitive decompetitiv	

## 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.

	60.001, SOP Title (1.1)							B
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tcome		·						
view Owner Admin, P	G	·	_					
mment			* *					
Reviewers								
Target Date	Reviewer	Action	Comment		Outcome		Review On	<u> </u>
28/02/2022	Gribbon, Paul	Please review this document.						
								3. 10
urrent Change red	quests against document							:
		Details		Raised Date		Status	5	
Number	quests against document Raised By Admin, PG	Details List the details rele	vant to the cha			Status		
Number CR113	Raised By			14/02/2022				
Current Change red Number CR113 CR115	Raised By Admin, PG	List the details rele		14/02/2022		Accep		

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			
			-
	ş		
	<u> </u>	Cancel	

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	tion - SOP 60.001, SOP Title (1.1)	5 X
Target Date	28/02/2022	
Reviewed On	16/02/2022 🔤 🔯	
Reviewer	Gribbon, Paul 👻 \cdots	
Outcome	Change Required	
Action Required	Please review this document.	
Comment	Details of the review.	<b>^</b>
	ОК	Cancel
L		

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

tcome view Owner A	Admin, PG						
dew Owner A	Admin, PG						
	Admin, Po						
ment			_				
			v				
eviewers							
arget Date	Reviewer	Action	Comment	0	utcome	Review On	
8/02/2022	Gribbon, Paul		Details of the revis	ew. d	hange Required	16/02/2022	
	(and any rade	Please review this document.				2010 CLEVEL	3
	(and de la rada	Please review this document.				- and	9
irrent Char	nge requests against document	Please review this document.					3
		Please review this document.		Raised Date		Status	4
urrent Char Jumber R 113	nge requests against document	Details		Rained Date			6 5 1 1

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.

iewed On	23/02/2022							
come	Change Required	9						
	Admin, PG		•					
L	Document Owne	er Comments		•				
eviewers								
Farget Date	2	Reviewer	Action	Comment		Outcome	Review On	<b>2</b> ,
				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	<i>₽</i> / ₽
			Please review this document.				10/02/2022	
urrent Cha		against document						<b>€</b>
urrent Cha		<b>against document</b> Raised By	Details		Raised Date		Status	
Current Cha Number CR113 CR115		against document	Details List the details rel	evant to the cha of the change re	Raised Date 14/02/2022			4

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.

ile Edit Vie	ew Actions Wind	ow Help						
•	🔒 📚 🧖	2. 🖻 耳	🚣 🚑 =n =ņ	🕐 🖓 - 🔁	60			
Warning	: Where this icon app	ears, refer to the tooltip	for more information.					
Туре	SOPs		<ul> <li>Number</li> </ul>	SOP 51.037	Revision 1.0			
Title			Statu	s Active				
Owner		- ··· Active D	ate 03/03/2022	🔲 🗹 🛛 Filena	ame SOP 51.037 v1.0			1
Author		T ··· Review D	ate 03/03/2025	Keywo				
			03/03/2023					
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Copyholders Number ▲	Notified Only Name	Dept/Organisation	Comment		Acknowledged Date		2 2 2	i •
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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					
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Туре	SOPs		<ul> <li>Number</li> </ul>	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	
Number 🔺	Name	Dept/Organisation	Comment	Distribution Date	Acknowledged Date	2	
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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		<b>*</b>

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.

Ocument Acknowledgement	×
Acknowledgement Accepted.	
	ок
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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 %	3
File Edit View Actions Window Help			
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▲ Warning: Where this icon appears, refer to the tooltip for more info	ormation.		
Type SOPs	Number SOP 51.037 Revision 1.0		
Title Storage and Transfer of Laboratory Data for Clinical Trials	Status Active	¥	
Distribution		<u>*</u> *	
Change Requests		*	
Review History		¥	
Revision History		¥	
2 Approved By		×	
Properties		*	
No additional properties assigned	User/Note Date/	Time 🔻	
	No Notes Added	٩	
			+

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.

Document Proper	rties Editor	B	23
	🥃 Notes		
Notes	User Wote Date \Time		-
	No Notes Added		
Additional Fields			
Related Documents			
Related Departments			
Related Processes			
Related			
Standards			
×			
Signatures			
	Add Edit Delete		
	ОК	Cancel	

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.

Document Proper	ties Editor					8	23
		Related Docu	uments				
Notes	SOP 51.0	)37 references the follow	ing:				
	Туре	-	No	Title			
Additional Fields							
Related Documents							
Related Departments							
Related Processes	Add	Remove					
	SOP 51.0	)37 is referenced by:					
	Туре	•	No	Title			
Related Standards							
×							
Signatures							
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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.

Type Any				Туре		
			-	Any		
Ceyword			-	Keyword		-
				SOP 50		
		🔎 Se	earch ×			🔎 Search
umber	Title	Туре		Number	Title	Туре
				SOP 50.010	Project Data Entry	CHAPTER\50 Gene
				SOP 50.009	Project Numbering	CHAPTER\50 Gene
				SOP 50.011	Setting up Researc	CHAPTER\50 Gene
				SOP 50.016	Development of ne	CHAPTER\50 Gene
				SOP 50.001	NHS Greater Glasg	CHAPTER\50 Gene
				SOP 50.013	Setup and mainten	CHAPTER\50 Gene
				SOP 50.017	Clinical Research &	CHAPTER\50 Gene
				SOP 50.018	Clinical Research &	CHAPTER\50 Gene
				SOP 50.006	Registration of Bio	CHAPTER\50 Gene
				SOP 22.050	Recording Pharma	CHAPTER \22 NHS .
				SOP 50.019	Independent Stak	CHAPTER\50 Gene
				SOP 50.020	eCRF User Accept	CHAPTER\50 Gene
				SOP 50.022	Preparation of Ter	CHAPTER\50 Gene
				SOP 50.021	Participant recruit	CHAPTER\50 Gene.

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.

📓 Document Prope	ties Editor			B	23
	Related Doc	uments			
Notes	SOP 51.037 references the follo	wing:			
	Туре	No	Title		
Additional Fields	CHAPTER\50 General\SOPs	SOP 50.010	Project Data Entry on SReDA		
Related Documents Related Departments					
Related Processes	Add Remove SOP 51.037 is referenced by:				
	Туре	No	Title		
Related Standards Signatures					
			ОК	Cancel	

# 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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