



# Document Control Teams User Guide

## Document Control Module

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## Introduction

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Document Control Teams allow for the grouping of staff into separate departments or units. You can utilize this feature to assign teams for document review and teams of employees to acknowledgment lists.

This user guide will cover how to add a new team, how to add employees to a team, how to use the Team Members color bar, and how to use the Locations and Documents color bars.

Mastering this feature will bring greater structure to your organization and save time by predetermining groups that will undertake document review tasks.

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## Teams Tab Overview

To set up a new Team or Team folder, select the **Teams** tab and then select the **Add** button. (Yellow box, Figure 1)

This will open the **Add Team or Folder** pop-up window. (Figure 2)

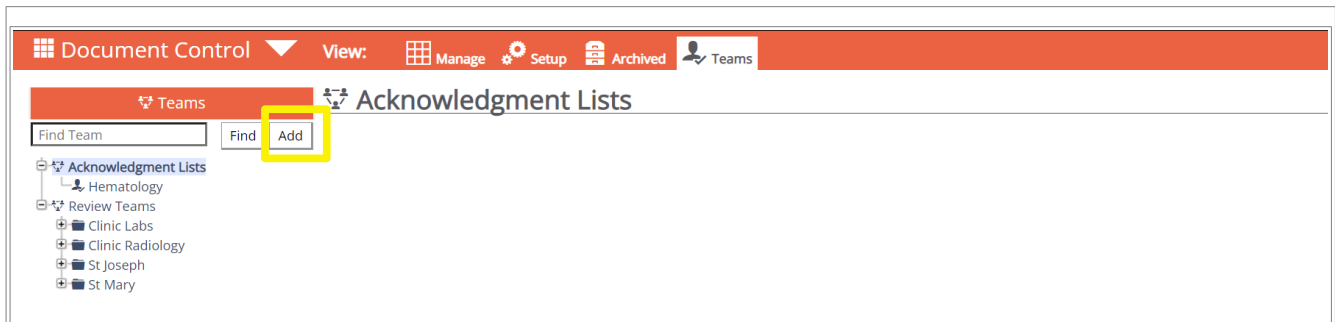


Figure 1

Enter in a Folder or Team name and then enter a description if applicable in the appropriate fields.

When finished, select the **Save Changes** button.

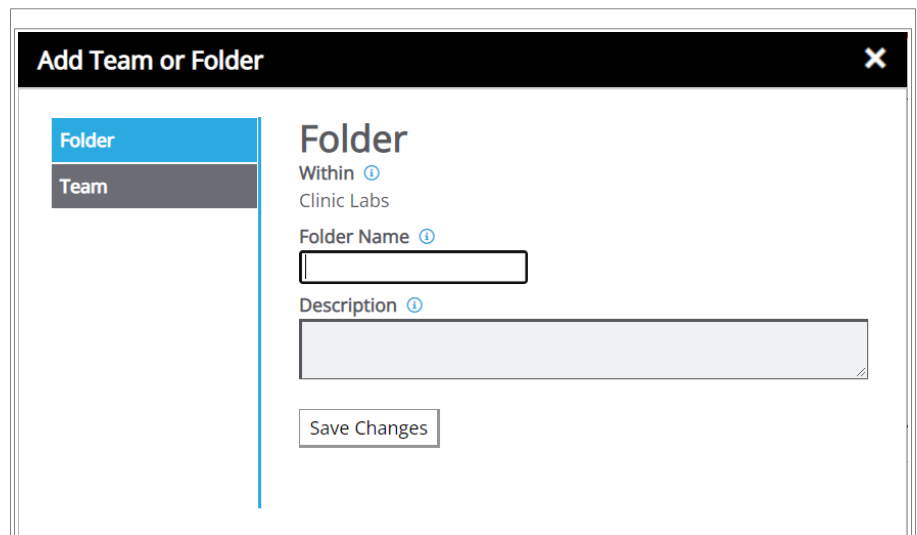


Figure 2

## Team Color Bar

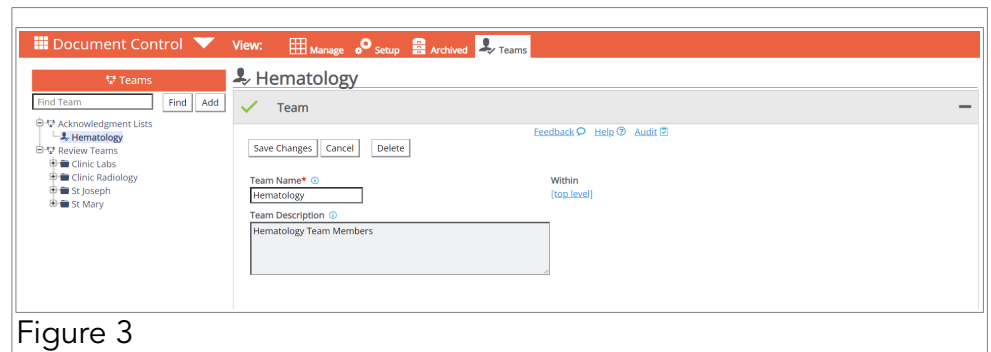
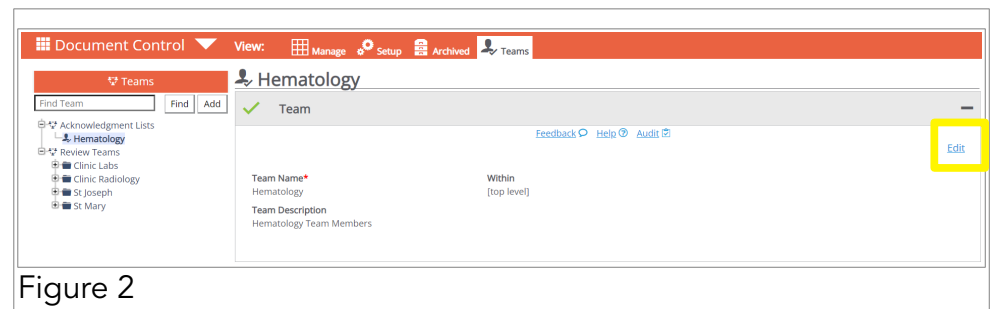
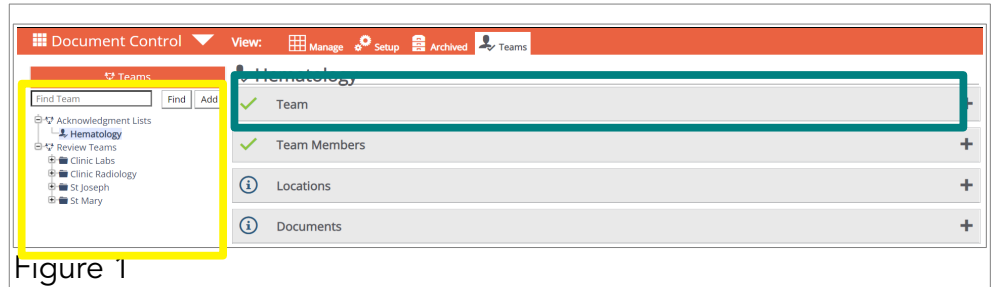
To make changes to an existing team, select a team from the tree picker (Yellow box, Figure 1) and then select the **Team** color bar to expand it. (Teal box, Figure 1)

Once expanded, select the **Edit** button (Yellow box, Figure 2) if you want to update the **Team Name**, **Team Description**, or hierarchy. (Which folder the Team is located in)

This will alter the appearance of the color bar (Figure 3) such that you can edit the fields.

If necessary, you can also delete the team by selecting the **Delete** button.

Once you are finished making edits, select the **Save Changes** button.



## Team Members Color Bar

The **Team Members** color bar is where you will add or remove employees from a given team. Select the color bar to expand it. (Figure 1)

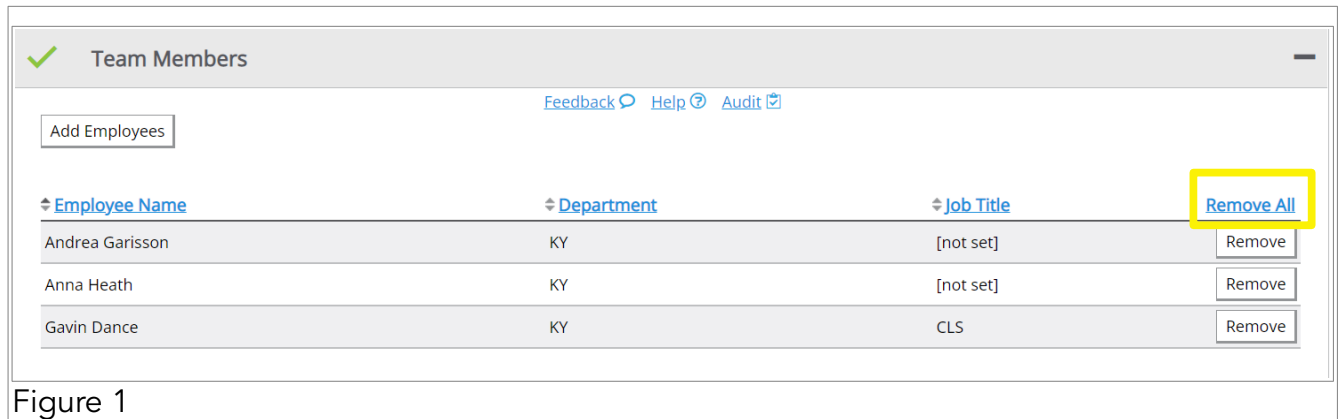


Figure 1

Selecting the **Add Employees** button will open the **Add Employees** pop-up window. (Figure 2)

You can use the filters to locate a specific employee (Yellow box, Figure 2) or simply type their name into the **Full Name** field.

Once you've selected your employee, select the 'Add to...' button. (Yellow box, Figure 3)

The employee will now appear in the Team member list.

To remove an employee, select the **Remove Employee** button adjacent to their name.

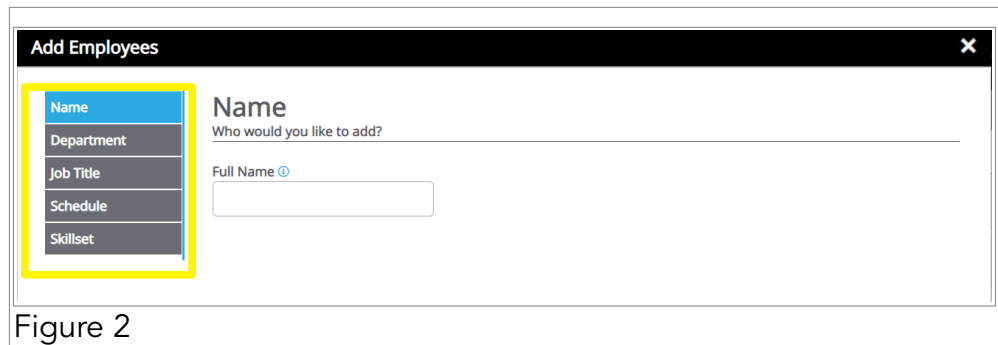


Figure 2

If you wish to remove all team members, select the **Remove All** link. (Yellow box, Figure 1)

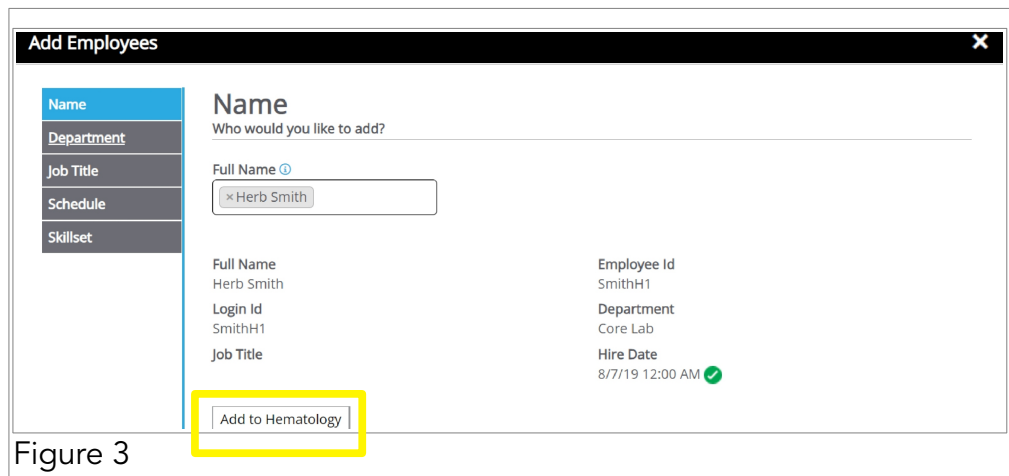


Figure 3

## Locations and Documents Color Bars

The **Locations** color bar allows you to view any Locations associated with a given team. The color bar is not editable and will list the **Location**, **Site**, and **Site Approver**. (Figure 1)

| Location  | Site             | Site Approver  |
|-----------|------------------|----------------|
| 1st Floor | Hawthorne Clinic | Tom Williamson |

Figure 1

The **Documents** color bar allows you to view any documents associated with a given team. These documents may be required reading to work at a site i.e. a procedure or policy. (Figure 2)

The **Documents** color bar is not editable and will list the document name, classification, document owner, and a short description of the document.

| Name                       | Classification | Owner        | Description                        |
|----------------------------|----------------|--------------|------------------------------------|
| Auto-Sed ESR Procedure     | HE.SOP.001     | Barbara Dodd | Auto-Sed ESR Procedure             |
| Loading the Automated Line | CH.SOP.002     | Barbara Dodd | Automated Line - Loading procedure |

Figure 2

## Resources

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This concludes the User Guide for **Document Control Review Teams**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Document Control module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

[Online Support Form](#)

## Related Topics

Please select any link to skip to that topic.

|   |                              |
|---|------------------------------|
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| <a href="#">Reviewers and Final Reviewers</a> | <a href="#">PDF Document</a> |
| <a href="#">Document Control Overview</a>     | <a href="#">PDF Document</a> |