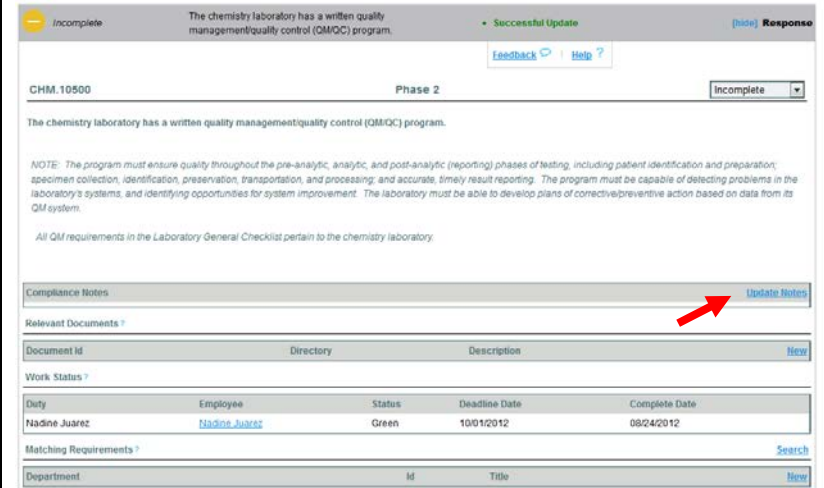


Inspection – View Requirements		
Step	Action	
1.	<p>Navigate to the License Site Tab and Core Lab site.</p> <p>Select List Tab.</p>	
2.	<p>Select View Requirements for the Bioanalytics Inspection List.</p>	
3.	<p>The list now shows all the Requirements. Let's look at the color bars for one of the Requirements.</p> <p>Select the Response color bar.</p>	

4. This view shows us the information on the Requirement selected – CHM.10500.

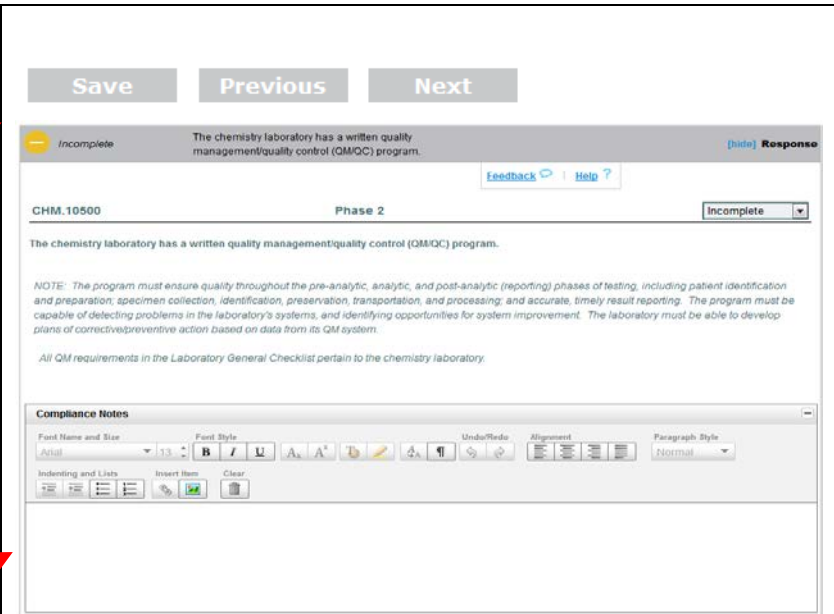
It also allows the Assignee to include Compliance Notes, load or link to documents, and search for matching requirements. Let's look at this one-by-one.

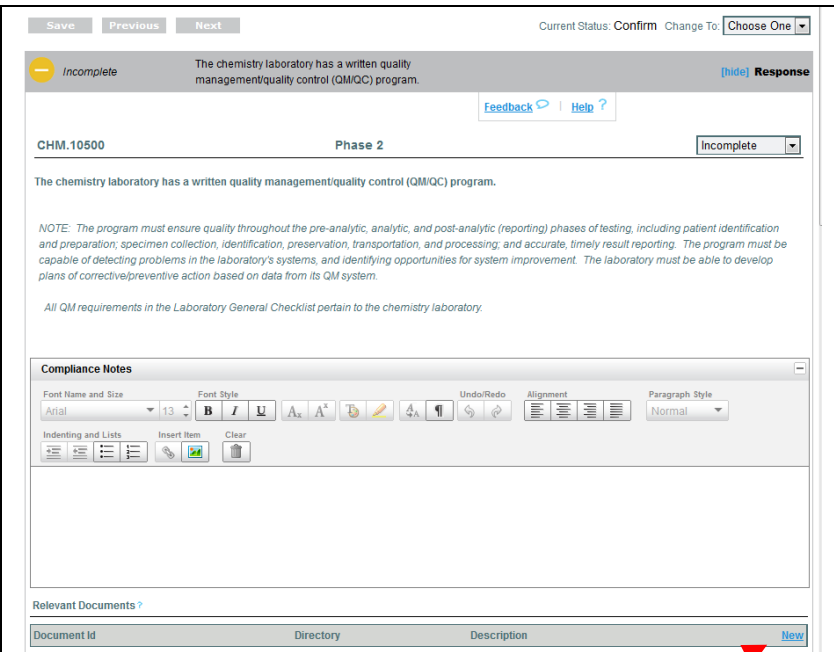

Select [Update Notes](#).

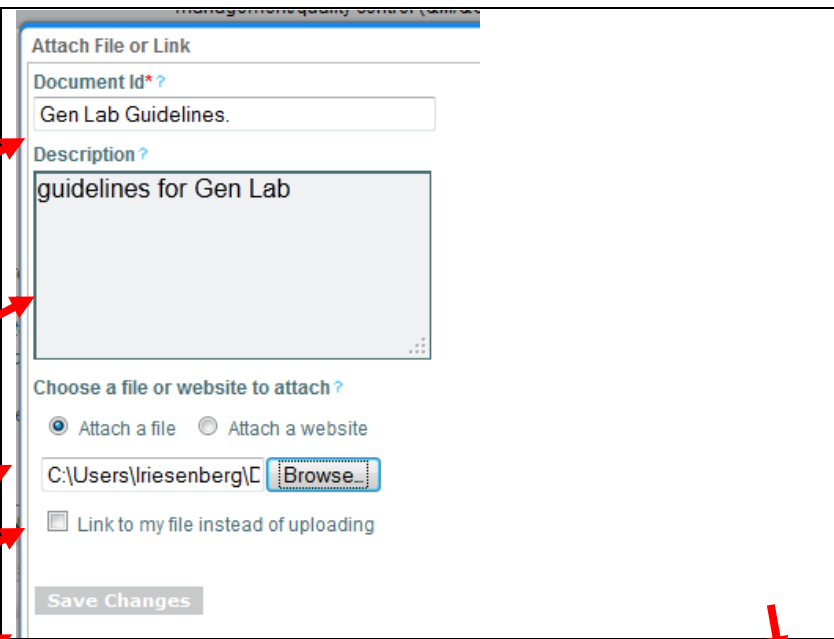
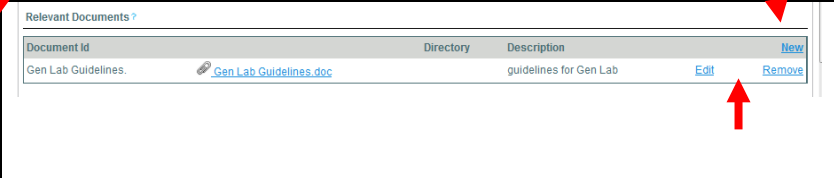


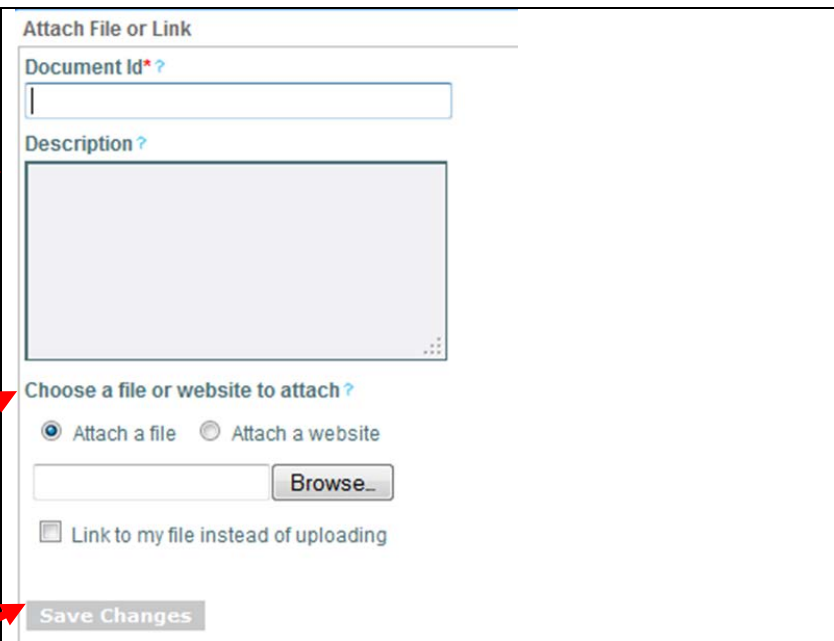
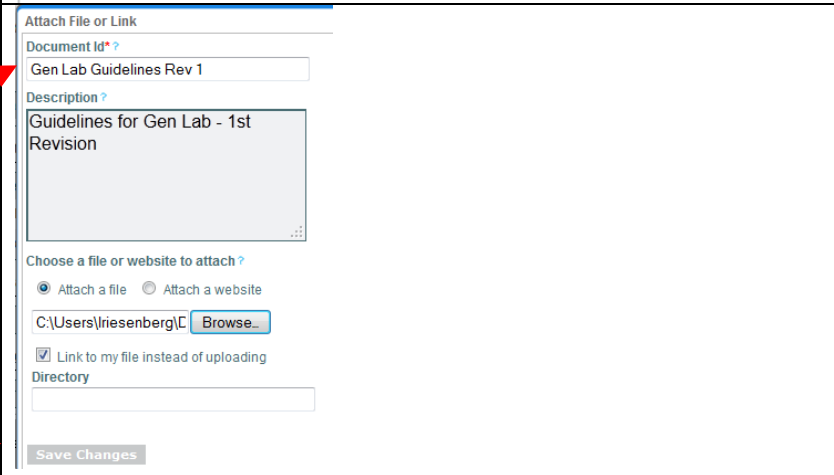
The screenshot displays the following interface elements:


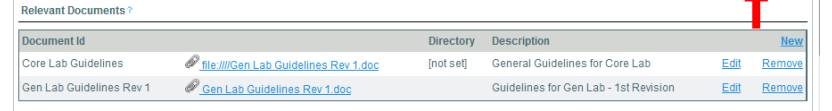
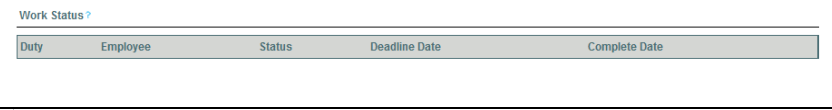
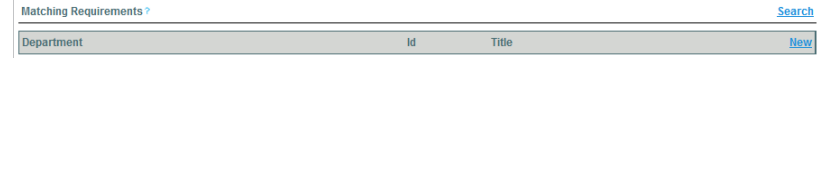
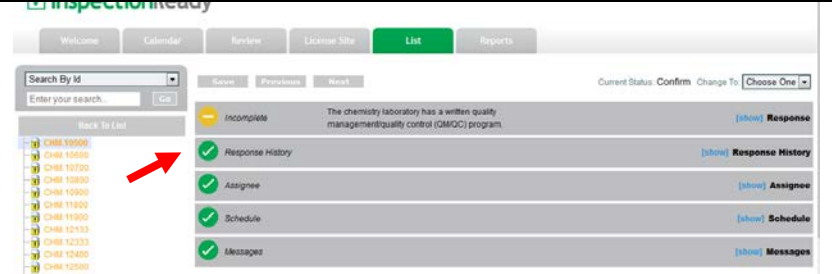
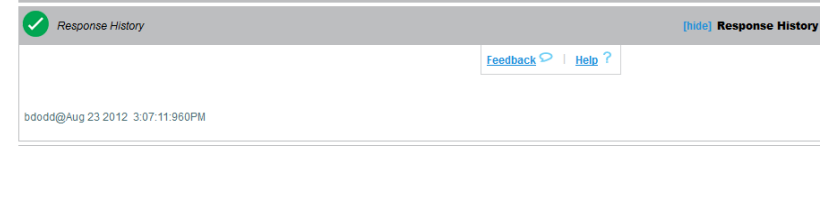
- Header:** Incomplete status, title "The chemistry laboratory has a written quality management/quality control (QMOC) program.", and a "Successful Update" notification.
- Requirement Info:** CHM.10500, Phase 2, and an "Incomplete" dropdown menu.
- Description:** "The chemistry laboratory has a written quality management/quality control (QMOC) program." followed by a detailed note about quality assurance.
- Compliance Notes:** A text input field with an "Update Notes" button highlighted by a red arrow.
- Relevant Documents:** A table with columns for Document Id, Directory, and Description.
- Work Status:** A table with columns for Duty, Employee, Status, Deadline Date, and Complete Date. One entry is visible for Nadine Juarez.
- Matching Requirements:** A table with columns for Department, Id, and Title.

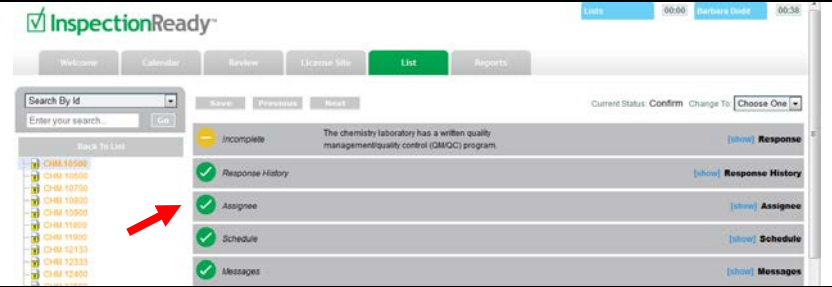
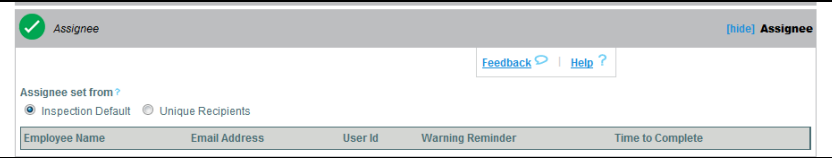
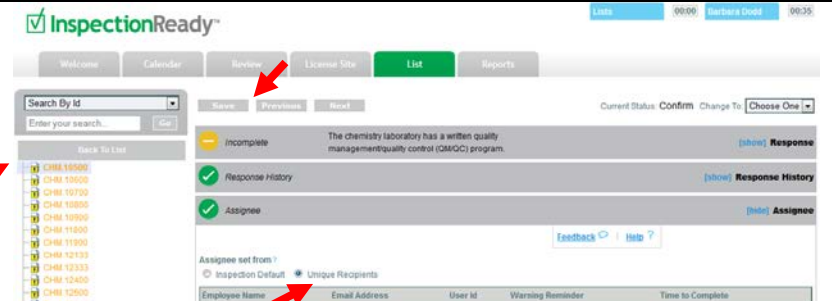
<p>5. Once this Inspection List has been Published, the Assignee has received this task to comply with the Requirement. The Assignee may want to add notes to verify compliance.</p> <p>The Assignee types in the desired notes and selects Save.</p>	
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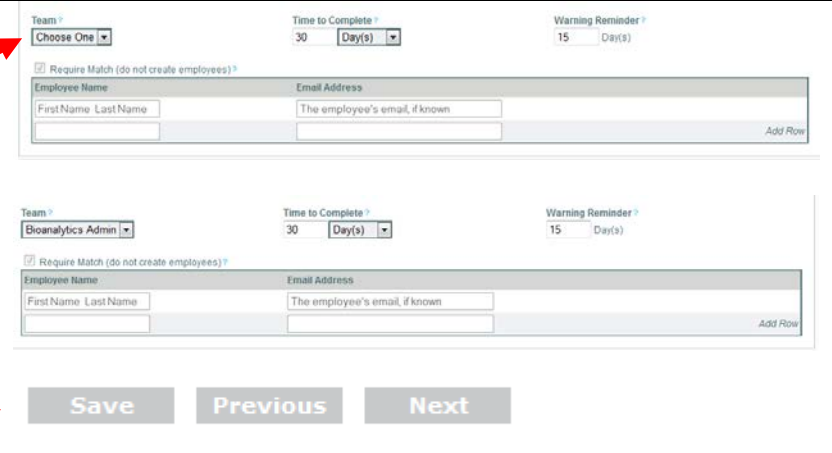

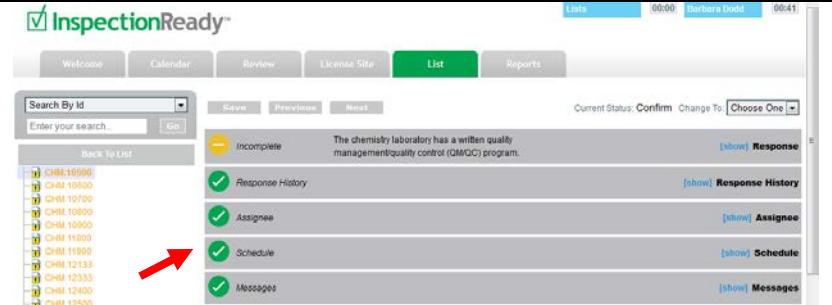
<p>6.</p>	<p>Relevant Documents: This feature allows you to upload/attach documents that are related to the Requirement.</p> <p>This should be done before the List is Published, so the Assignee has the information he or she would need to verify compliance. The Assignee may also include documents to support compliance.</p> <p>Select New for the Relevant Documents.</p>	
<p>7.</p>	<p>There are three ways you can include a file: attach it, provide the link to file, or show the website where the information is stored.</p>	

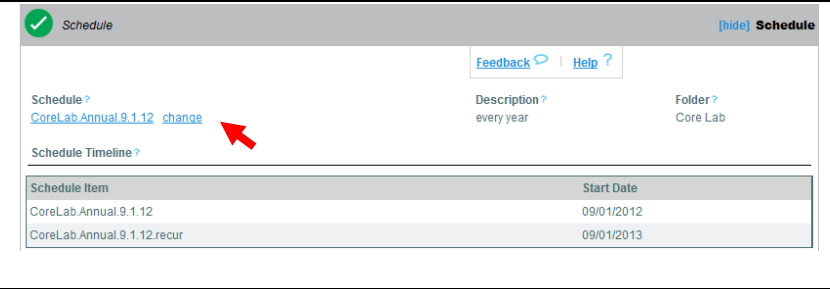
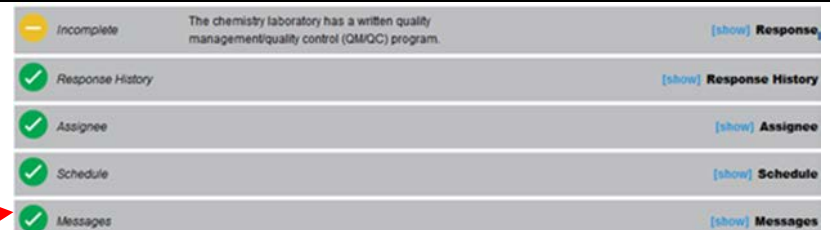
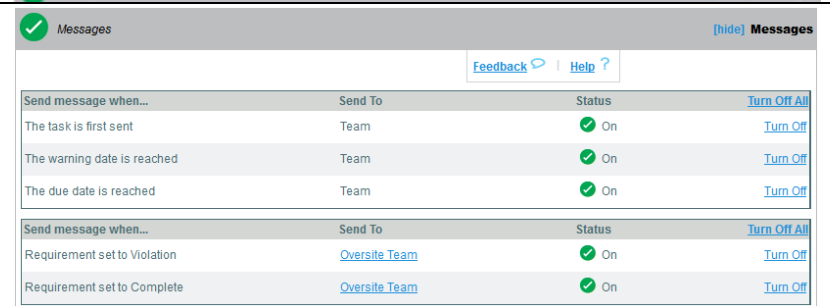
<p>8. In the Attach File or Link window, we are <u>attaching</u> a file in this example.</p> <p>Enter the Name or Document Id of the document.</p> <p>Write a brief description in the Description field. This is especially helpful when there are many requirements and documents.</p> <p>Select Attach a file.</p> <p>Click on Browse and select the file you want to attach.</p> <p>Select Save Changes.</p>	
<p>9. Remove this file by selecting Remove.</p> <p>Edit this file by selecting Edit.</p> <p>Select New.</p>	

<p>10.</p>	<p>We will now add a file <u>via a link</u> instead of an attachment.</p> <p>Type in the name or ID of the document in Document Id.</p> <p>Add a description of the document in Description.</p> <p>Select Attach a file.</p> <p>Select Link to my file instead of uploading.</p> <p>Select Browse and select the file.</p>	
<p>11.</p>	<p>Select Save Changes.</p>	

<p>12. Remove the document by selecting Remove. Edit the document by selecting Edit. To load another document, select New.</p>	
<p>13. Continue using the same process to add/remove/edit documents.</p>	
<p>14. The Work Status table displays a list of Assignees that are assigned work for this requirement and will be displayed after the Inspection List has been Published.</p>	
<p>15. Matching Requirements: Some requirements can be similar between inspection lists. This table allows you to track the matches and view the notes on the matching requirements by clicking on the id. This feature would be used by the Assignee while completing his or her task.</p>	
<p>16. Select the Response History color bar.</p>	
<p>17. The Response History color bar shows you the Assignee's interaction with the selected checklist. Listed on the color bar itself is the ID of the last Assignee to respond to a requirement and the date the Assignee replied. Opening the color bar shows you what the Assignee did with the requirement. We will look at this again after we Publish the Inspection List.</p>	

<p>18.</p>	<p>Select the Assignee color bar to expand.</p>	
<p>19.</p>	<p>If you would like to assign someone different to this or any other requirement, this is where to do it.</p>	
<p>20.</p>	<p>To assign someone else to a specific Requirement, select that Requirement.</p> <p>Select Unique Recipients.</p> <p>Select Save.</p>	

<p>21.</p>	<p>From the Team drop down menu, choose the Bioanalytics Admin by clicking Select.</p> <p>Select Save.</p>	
<p>22.</p>	<p>For the Requirement, CHM.10500, Terri Sullivan will be given the task to complete this requirement. You may do this for as many requirements as you like.</p>	
<p>23.</p>	<p>Select the Schedule color bar to expand.</p>	

<p>24.</p>	<p>This is the default schedule for the Bioanalytics Inspection List. Remember, this was set up in the License Site Tab/ Primary Schedule color bar. (See Quick Reference License Site – Primary Schedule for details.)</p> <p>If you would like to adjust the schedule for a specific Requirement, this is where you would do it.</p> <p>Select the Requirement in the tree on the left (Step 23), then select Change.</p>	 <p>Schedule [hide] Schedule</p> <p>Feedback Help ?</p> <p>Schedule ? CoreLab Annual.9.1.12 change Description ? every year Folder ? Core Lab</p> <p>Schedule Timeline ?</p> <table border="1"> <thead> <tr> <th>Schedule Item</th> <th>Start Date</th> </tr> </thead> <tbody> <tr> <td>CoreLab Annual.9.1.12</td> <td>09/01/2012</td> </tr> <tr> <td>CoreLab Annual.9.1.12.recur</td> <td>09/01/2013</td> </tr> </tbody> </table>	Schedule Item	Start Date	CoreLab Annual.9.1.12	09/01/2012	CoreLab Annual.9.1.12.recur	09/01/2013																						
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CoreLab Annual.9.1.12.recur	09/01/2013																													
<p>25.</p>	<p>Select the Message color bar to expand.</p>	 <p>Incomplete The chemistry laboratory has a written quality management/quality control (QM/QC) program. [show] Response</p> <p>Response History [show] Response History</p> <p>Assignee [show] Assignee</p> <p>Schedule [show] Schedule</p> <p>Messages [show] Messages</p>																												
<p>26.</p>	<p>These message settings are the default settings for the Bioanalytics Inspection List. If you would like to adjust the settings for a specific Requirement, this is where you would do it.</p> <p>Select the Requirement in the tree on the left (Step 23), then refer to Quick Reference Inspection – Primary Messages for detailed instructions.</p>	 <p>Messages [hide] Messages</p> <p>Feedback Help ?</p> <table border="1"> <thead> <tr> <th>Send message when...</th> <th>Send To</th> <th>Status</th> <th>Turn Off All</th> </tr> </thead> <tbody> <tr> <td>The task is first sent</td> <td>Team</td> <td>On</td> <td>Turn Off</td> </tr> <tr> <td>The warning date is reached</td> <td>Team</td> <td>On</td> <td>Turn Off</td> </tr> <tr> <td>The due date is reached</td> <td>Team</td> <td>On</td> <td>Turn Off</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Send message when...</th> <th>Send To</th> <th>Status</th> <th>Turn Off All</th> </tr> </thead> <tbody> <tr> <td>Requirement set to Violation</td> <td>Oversite Team</td> <td>On</td> <td>Turn Off</td> </tr> <tr> <td>Requirement set to Complete</td> <td>Oversite Team</td> <td>On</td> <td>Turn Off</td> </tr> </tbody> </table>	Send message when...	Send To	Status	Turn Off All	The task is first sent	Team	On	Turn Off	The warning date is reached	Team	On	Turn Off	The due date is reached	Team	On	Turn Off	Send message when...	Send To	Status	Turn Off All	Requirement set to Violation	Oversite Team	On	Turn Off	Requirement set to Complete	Oversite Team	On	Turn Off
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