System Manager & Personnel Workbench 11

System Manager & Personnel: Workbench 11

Workbench Compliance and Standards Management Solutions

Workbench Professional and Quality Workbench are the flagship products of Ideagen Software Limited, who have been leading the way in software solutions aimed at Document, Compliance and Standards management since 1993.

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Publisher

Ideagen Software Limited

Managing Editor

Ros Matthews

Technical Editors

Paul Kenyon

Rubina Hajat

Team Co-ordinator

Paul Kenyon

Graphics

Ideagen Graphics & Marketing

Additional Resources:

For training courses, implementation and additional resources, please contact: Ideagen Software Limited, Lime Tree Business Park, Lime Tree Road, Matlock, Derbyshire, DE4 3EJ, England

Telephone: +44 (0) 1629 761590 or email: sales@ideagen.co.uk

Alternatively, see the website: www.ideagen.co.uk

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1 Introducing Workbench

Workbench is a collection of software modules designed to assist in the implementation and smooth operation of day to day management control. The overall system consists of the following modules:-

- Audits
- Customer Care
- Document Control
- Nonconformities
- ReportQuest **
- Test and Calibration
- Training

** ReportQuest is different in concept to the other six modules; it is a ‘plug-in’ rather than a ‘stand-alone’ module. It integrates with any or all other modules and utilises the information stored in them.

Each module (apart from ReportQuest) has been carefully designed to be a powerful individual management aid and for many organisations it may be entirely appropriate to run any on a ‘stand-alone’ basis. There is, however, considerable integration between the different modules and this could offer many benefits to organisations running a comprehensive quality or other compliance management system. Any company that wishes to adopt a ‘phased’ implementation can add modules to the system as and when required.

The System Manager and Personnel modules are installed as an integral part of all other modules. The System Manager handles most of the system's security and it is envisaged that access to this module will be restricted to the system administrator and/or personnel with the highest security clearance. The Personnel module maintains a centralised database of personnel that can be accessed by every installed module; again it is suggested that access to this module be restricted.

Each module has its own electronic reference manual and on-screen Help system that is context-sensitive; these guides should not, however, be seen as a substitute for professional advice and training. Workbench is designed to be extremely easy to use in its daily operation but the preliminary setting up of a module can be relatively complex. We urge taking appropriate advice in these circumstances wherever possible, particularly where some doubt exists as to the best method of achieving specific business aims with the software.

The Help files assume that you have either Workbench Professional or Quality Workbench with all optional areas licensed. Any areas not licensed, will not be available.

Workbench 11 has several additional, separately licensed elements plus many new features; each is explained in detail in the appropriate Help topics, but please see Updates for Workbench 11 for an overview.

1.1 Entering licence details

To complete the Licence Details dialog you will need to have your licence (EQL) file as provided by Ideagen Software or your re-seller.

Importing the licence details

This must be done on the Workbench server using the **Workbench Configuration Manager**. Start this program if it is not already running.

The first thing the program needs to know is how to connect to the licence database. To do this it needs three things:-

- the name of the server
- the username and password required to connect to the InterBase server
- the location of the licence database on that server.

The installation program should have determined these, but if it has not or anything has changed you will need to enter them by hand...

1 Select the **Servers** page and ensure that the server upon which the database is located is defined. If it is not then click the **Add** button.

2 Fill in the **Server name**, **Username** and **Password**.

3 Click on the **Save** button to register the new server. **NB**. This server must be the one you registered when purchasing Workbench.

Once you have specified the server settings you will need to specify the database location. To do this go to the **Licence** page and check the **Licence Database Location** mandatory field - if this is empty you will need to either type in or select the location of this before proceeding any further.

Now that you have a valid location for the licence database you can import the licence details by doing the following:-

1 Click on the **Import** button and select the EQL file when the **Open File** dialog appears.

2 If required, browse to wherever the EQL file (supplied by Ideagen Software or the re-seller) is located and double-click on it to import the file.

3 If everything is OK, the licensed areas that you have purchased will all be shown.

4 Click the **Apply** button at the bottom of the dialog. If the program reports any problems then check your details and try again. If no problems are reported then the relevant modules/areas will be activated.

1.2 Types of licence

Workbench offers four different types of licence:-

- **System licences** give access to the complete system, ie. to all active Workbench modules.

  NB. The normal Workbench security facilities can still restrict access within a module; these security features allow menu options to be completely turned off by the system administrator on an individual user basis (see Access | Set User).

- **Module licences** allow access to a specified module only. In order for this type of licence to 'kick in' the relevant module must be set up as the Default module in **File | User Preferences | Workflow Settings** page. If this is not done, a System licence will be used.

- **Workgroup licences** primarily allow the sending and receiving of external mail and also give access to the **File** menu. When responding to external mail, Workgroup licences are a very cost-effective alternative to System licences.

  If you have the Document Control module installed, a Workgroup licence will also let you view documents via the start-up screen.

- **Area licences** allow access to a specific function within Workbench. Within Workbench Professional, most Area licences are automatically enabled. Quality Workbench users may purchase licences for specific areas at additional cost.

Area licences are either enabled or disabled. You do not purchase an actual number of them. These include:-

Active Directory, Attachments, Blob searching (within document searching), Business rules, Complaint escalations/transfers, Delegation/On behalf of, Document encryption, Document process flow, Document reviews, Globally replace, Groups and templates, Issue documents to PDF, Message configuration, Password configuration, Run audits on a PDA, User defined actions, User defined analysis, Workbench Office for Microsoft Office, Work volume assistance.

All Workbench licences work on a concurrent user basis, not on a workstation basis. The system tracks how many users are logged in on the various licence types at any point in time and will only disbar a user if the licence count has reached its maximum. The important point here is that it does not matter where those users are logged in, ie. the licence is a ‘floating’ licence allowing you to access the system from any workstation of your choice.

If all your System and Module licences are currently in use, the program will present a warning.

NB. In special circumstances a **Reserved Licence** may be set up **-** one reserved specifically for a nominated user. This will then be taken out of the 'pool' of licences available to other users.

1.3 Licence administration

The administration of licences is normally done automatically by the Workbench service. The Licences page of the **Workbench Configuration Manager** shows which licences are available; the **Licence Manager** (part of the database tools) shows which licences are currently in use and also allows administrators to disconnect users.

To use either of these, start the appropriate program:-

- in the case of the **Workbench Configuration Manager**, select the **Licences** page and check that the licence location is correct, then click the **Connect** button to fetch the licences. If the program reports any problems connecting to the licence database then you should follow the instructions and then try again.
- in the case of the **Licence Manager**, connection to the licence database will be automatic and all licences currently in use will be displayed. This view will be automatically updated every so often (the period of time is determined by the **Refresh** field on the **Licence Settings** page of the **Server Configuration** dialog) to indicate licences added or removed. The view can also be manually refreshed at any time by using the F5 key.

  To forcibly disconnect a user, select them from the grid and click on the **Disconnect** user button. After being asked for confirmation, the user’s licence will be dropped and the user informed that they have to log out.

1.4 Licence availability

To find out how many licences are in use, choose **Help | About Workbench** from the **Help** menu. This invokes a dialog that gives numerous pieces of information on the current client configuration.

Under the heading ‘Licences In Use/Registered’ is a list of all the currently registered modules/areas. The second column of this list indicates the number of licences registered and the number in use. For example, ‘1/30’ means that there are thirty licences registered for that module, one of which is currently in use. If a module has been enabled but no specific module licences have been installed then the module will rely on System Licences for access. In this case the second column will contain a ‘<system>’ indicator.

Below this list of modules are two lines that tell you:-

- what the state of the reserved licence is
- which user you are logged in as and which database you are connected to.

1.5 Logging in and selecting a database

Logging on to Workbench is a straight-forward process but the Login dialog you are presented with will depend on how the system administrator has configured your authentication - ie. whether Windows or Workbench authentication should be used and what restrictions, if any, there should be if using Windows authentication. (The option to use Windows or Workbench authentication is licensed by default for Workbench Professional users but separately for Quality Workbench.)

Logging in to a chosen database requires the entry of a mandatory **Login** and (optionally) a **Password**; these are required after selection of the database. The Login dialog can also be invoked from the **Login to Database** dialog in the File menu.

Using **File | Workstation Settings** (providing you have been given access to this option) you may set up a **Default Database** and **Login** which will save time on future logins. Depending on authentication configuration you may also choose to login automatically - see Workstation settings.

Logging on to Workbench

1 Start Workbench by double clicking on your desktop icon or by selecting it from the **Start** menu. The **Log on to Workbench** dialog will appear. Depending on how your authentication has been configured by the system administrator this will appear in one of several forms. The basic login procedure where Workbench authentication is being used is as follows, but see below for variations when Windows authentication is being used.

2 If no default database has been set, (in the **Workstation Settings** dialog), enter a database or select from the drop-down menu (mandatory field). The dialog will automatically expand. If a default database has been set this will appear in the top field.

3 Enter your **Login** (mandatory) and **Password** (optional) which are both case sensitive. The defaults in the software as shipped are both ‘admin’. A warning appears if the Caps Lock is on whilst typing a Password.

4 See below for notes on using the *Limited access* check box.

5 Press the return key or click **OK**.

6 If the *Show 'View Document' dialog when logging into Workbench* workflow setting is checked (the default is unchecked), the **View Document** search screen loads automatically when the user logs in, provided that all relevant licensed areas and access rights have been verified (see Personal workflow settings).

Limited access

To use only a Workgroup licence, (so freeing up System licences for other users) click in the check box marked *Limited access*.

If there are no Workgroup licences available, the *Limited access* check box will automatically be over-ridden and one of the following will happen:-

- if you have set a Default module (**User Preferences | Personal workflow settings**) and there are any Module licences available for your default module, then you will be given full access to that module via a Module licence. Normal access rights as configured by admin. will apply.
- if you don't have a default module set up or there are no Module licences available, then you will be given access via a System licence (again with access rights as configured by admin.).

Using Windows NT Logon

The system administrator may configure authentication to Workbench to be via your Windows Login and password (where applicable). If this is the case, the initial Login dialog will not be exactly as described above. If Windows authentication is being used, the administrator also has choices as to whether users will require a password to login to the database and/or to authenticate decisions.

1. If using Windows authentication, the **Log on to Workbench** dialog will automatically show your Windows login in the **Login** field, which will be disabled.

2. If you are required to enter a password to login to the database, you should enter this in the **Password** field. If a password is not required, the dialog will state this.

3. The *Use current Windows login* check box allows the user to login as another Workbench user if required. It will be checked initially, but when it is unchecked, the **Login** field will become enabled and the **Password** field displayed, regardless of whether the user requires a password to login to the database. This is because the user is effectively asking to login as a different Windows user, and so will need to provide that user's Login and relevant Windows password.

4. See above for notes on using the *Limited access* check box.

5. Press the return key or click **OK**.

NB. If the **Login** 'admin' is entered, the system reverts to using normal Workbench authentication, regardless of settings, and shows the user it is doing this - ie. the dialog states 'Login using Workbench authentication'.

Logins (user names) are set up by the system administrator (see Creating personnel records). If Workbench authentication is being used, the administrator may change a user's password via **Configuration | User Login | Change Users Password**; if Windows authentication is being used this is inapplicable and the menu item will not be present. If a Login or Password is entered incorrectly, the system will respond with the message ‘Cannot validate user. Please try again.'

Changing your own password

Providing that you have been granted access to the **File | User Preferences** menu option you may change your own password, providing that you know your current password - see Changing your own password. This is not possible (regardless of access rights) where Windows authentication is being used, unless the logged-in user is 'admin'.

If you fail to log in successfully after several attempts

An Error message may occur depending on how password constraints (if any) have been set up. If this happens, the user must contact the system administrator for password reactivation. The administrator will automatically be mailed, internally and externally, whenever a user is 'locked out' of the system. The **Locked Out History** report also logs the number of times any user has been locked out and when.

If your password has expired

A warning will be issued and you will be given the option to change the password. Choosing **No** returns you to the main dialog. Choosing **Yes** will bring up the Change Expired Password dialog. Type in a new password in the top field and then confirm the exact password in the bottom field. You will not be allowed to proceed unless the two are identical and that they conform to the constraints (if any) listed at the top of the dialog. Password constraints are set up (normally by the system administrator) in the Workbench Configuration Centre | Workflow Settings page | System Wide | Password Configuration (see Password configuration).

If all your Workbench system and module licences are currently in use

The program will present a warning message. However, if you have additional Workgroup licences (see Types of licence) that are not being utilised you can still go in to Workbench via external mail and, if you have the Document Control module installed, view documents.

Changing your Login within the same database

If you are already logged in to the system and wish to change your Login while remaining connected to the same database, you can invoke the **File | Login to Database** menu option (see File menu). This effectively permits you to log in as a different user. It is a feature that is likely to prove most useful to system administrators wanting to check other users' configuration of the system. Here you may also switch to another database without having to exit the system (see below).

Changing to a different database from within Workbench once logged in

A user currently logged in to a Workbench database can easily switch to another 'on the fly', ie. without having to exit the system and re-enter. Simply use the **Login to Database** option from the **File** menu. This will display the **Log on to Workbench** dialog described above and allow the choice of a different database. Note, however, that you must still log in to the new database as users may have substantially different access rights between databases.

If you attempt to select a database from within another database and fail, you will be returned to the original database.

1.5.1 Changing an expired password

If your password has expired, a warning will be issued and you will be given the option to change the password. Choosing **No** returns you to the main dialog. Choosing **Yes** will bring up the **Change Expired Password** dialog.

Type in a new password in the top field and then confirm the exact password in the bottom field. You will not be allowed to proceed unless the two are identical and that they conform to the constraints (if any) listed at the top of the dialog.

Password constraints are set up (normally by the system administrator) in the Workbench Configuration Centre | Workflow Settings page | System Wide | Password Configuration (see Password configuration).

1.6 Password dialogs and Windows

If Windows authentication is being used, passwords may or may not be required for authenticating decisions, at the discretion of the system administrator:-

- if a password is required then the user should use their Windows password whenever a password is asked for
- if configured not to require password verification, password fields normally appearing for Workbench authentication, will not be shown.

Several other adjustments will be made when Windows authentication is being used:-

- the **Password** page of the **User Preferences** dialog becomes redundant and is therefore removed for all users except 'admin'

- as Workbench passwords aren't being used, the **Password** and **Verify Password** fields in **Personnel | Record | Personnel | Create User** are also redundant and therefore have been removed
- the **System Manager | Configuration User Logins | Change Users Password** dialog is redundant (as only 'admin' is using a Workbench password) and is therefore removed.

1.7 Password configuration

Passwords are configured and maintained for all users on a per database basis by the system administrator in the **Workbench Configuration Centre**; the same Password constraints will apply if passwords are used in IntraVista Professional.

Separate password constraints may be set up for use with the Workbench Office add-in - see Workbench Office password settings.

Configuring or amending password constraints

1 From the **Configuration** menu in the System Manager module, choose **Workbench Configuration Centre**.

2 Go to the **Workflow Settings** page.

3 Use the *Expand all workflow settings* check box to expand the whole dialog or click on the + alongside the System heading to expand the System list of entries.

4 Select **Password Configuration** and click on the **+** alongside to expand the list of nine options (some interdependent). **NB**. When Windows authentication is being applied to the selected database, a note alongside the Password Configuration options will indicate that they will apply to 'admin' only **-** (for other users, Workbench passwords will be redundant).

5 Configure the password constraints as required (with the help of the notes below) and click on the **Apply** button. All settings currently in force appear at the right of the dialog, alongside the relevant option.

- *Restrict number of login attempts* - Users may attempt to log in for an indefinite number of times unless this option is selected. To restrict these attempts, highlight the option and check the *Use this workflow setting?* box. Then highlight the next option *Number of login attempts allowed* and enter the number of times (in the **Setting value** field at the bottom of the dialog) that a user may try to login before they are ‘locked out’ - see also Restoring a locked out user.

  NB. The *Number of login attempts allowed* option will only be active if the *Restrict number of login attempts* option has been checked. Changes to either of these options will take effect the next time a user logs in.

- ***Other password settings** / Force password change* - This option allows you to force a password change after a specified number of days. Highlight the option and the *Use this workflow setting* check box will open at the bottom of the dialog. If ticked, the *Force password change* option is activated and the second option *Days between password changes* will allow you to specify the number of days that a password may be used before the system will force a change. To set or alter this figure, highlight the *Days between password changes* option and enter the required number of days in the **Setting value** field. To de-select either of these options, make sure that the *Use this workflow setting?* check box is unchecked.

  NB. The *Days between password changes* option will only be active if the *Force password change* option has been checked. Changes to either of these options will take effect the next time a user logs in.

- The bottom five settings will take effect the next time a user changes their password:-

  Passwords must contain letters and numbers - To force a user's password to contain a mixture of letters AND numbers, highlight this option and check the *Use this workflow setting?* box.

A minimum length password is required - To force passwords of a minimum length, highlight the option and check the *Use this workflow setting?* box. The *Password minimum length* option will then be active; highlight this and enter a minimum length for the password (between 1 and 12 characters) in the **Setting value** field. The *Password minimum length* option will only be active if *A minimum length password is required* option has been checked.

To allow blank user passwords (ie. no password at all) make sure that the *Passwords must contain letters and numbers* AND *A minimum length password is required* options are both de-selected.

Allow password re-use - To allow the re-use of passwords, highlight this option and check the *Use this workflow setting?* box. You may then decide (highlight the *Number of password changes before allowing same password* option) how many other, different passwords should be used before the original one can be re-used (between 0 and 99).

To totally disallow the re-use of any password at any time, make sure that the *Use this workflow setting?* box is unchecked.

Password constraints (as configured above) will appear on the **File | User Preferences | Preferences** page and in the **Change Password** dialog in the System Manager module (see Configuration | User Logins | Change Users Password). Users authorised to change a password will therefore be aware of any constraints currently in force.

- ***Additional password requirements*** that may also be configured in the **System Wide** settings:-
  - *Require password when raising a change request*
  - *Require password when issuing a document*
  - *Require password when responding to a review*
  - *Require password when updating or completing a training course.*

The four settings above default to being unchecked. To activate, highlight an entry and check the *Use this workflow setting?* check box at the bottom of the page. When checked, a password will be asked for at relevant times. If a user does not have a password, then the **Password** field should be left blank when password verification is requested (for example, when raising a change request).

1.8 Inactivity disconnection period

The system administrator may configure the system to automatically disconnect users after a specified period of time if the user's machine remains inactive. Optionally, the disconnection may be preceded by a warning.

To automatically disconnect users

1. From the **Configuration** menu in the System Manager module choose **Workbench Configuration Centre**.
2. On the **Workflow Settings** page expand the list of entries under the **System Wide** heading (double-click or click on the **+** sign alongside).
3. The current *Inactivity disconnection period* is shown in minutes to the right of the screen; this is the time allowed before users are automatically disconnected from Workbench if inactive. (If this time is set to '0' the *Inactivity warning period* and other inactivity entries will be disabled - you cannot set a warning period without a disconnection period.)

4 Double-click on the *Inactivity disconnection period* entry to reveal a **Setting value** field at the bottom of the dialog; enter a different number of minutes if required. Once a disconnection period (greater than 0) has been entered, the *Inactivity warning period* entry will be enabled allowing you to double-click on it and set an appropriate number of minutes, again in the **Setting value** field at the bottom of the dialog. The disconnection period must be greater that the warning period by at least one minute.

5 The *Apply Workbench inactivity settings to user specified for reserved licence* is checked by default if an *Inactivity disconnection period* is specified. Uncheck this setting if you want reserved licence users also to be disconnected automatically.

6 Click on **Apply** when you have the setting(s) configured as you want; an information message 'Workbench Configuration updated' will confirm that the settings have been accepted. You may then continue to configure any further settings. Clicking **OK** closes the dialog.

Amendments will take effect when users next log in.

See also: Tracking inactivity whilst editing documents   Inactivity settings for reserved licences

1.9 Inactivity settings for reserved licences

- *Apply Workbench inactivity settings to user specified for reserved licence* is checked by default if an *Inactivity disconnection period* is specified. This prevents users of reserved licences being subject to the 'time-out' feature that can be applied to non-reserved licences.

Uncheck this setting if you want reserved licence users also to be disconnected automatically (see Workbench Configuration Centre | System Wide settings).

1.10 Tracking inactivity whilst editing documents

This option can only be actioned if the *Inactivity disconnection period* option (Workbench Configuration Centre | Workflow Settings page | System Wide) is set to a value higher than '0' minutes.

When users are editing documents (in Word) for instance, strictly speaking this could be regarded as inactivity as far as Workbench is concerned. If the *Track inactivity in Workbench whilst editing documents* option remains unchecked, Workbench ignores the *Inactivity disconnection period* and will not disconnect the user.

If the option is checked, Workbench regards any editing time as inactivity and will disconnect the user after the specified disconnection time, even if in the middle of editing a document. A warning will be given if the *Inactivity warning period* option is also in force, but if not, no warning will be given.

See also: Inactivity disconnection period

1.11 Network failure

If a network failure occurs you will normally receive the message ‘You have been disconnected from the network’. However, if a document is having its content edited when the network disconnection occurs then Workbench stays silent until you finish the edit. Then the **Save document to file** dialog will appear stating that you have been disconnected from the network and asking if you want to save the document to an external file. Read the instructions carefully and either:-

- type in a file location in the **Save document to** field or use the Browse button (**…**) to look up the location. Hit the **Save** button (this will become enabled once text has been entered) and the document will be saved to the file specified in the **Save document to** field. The program will then close and you will need to log in again to restore the document into the database
- or... but **beware that if you do this** all changes that you have made to the document will be irretrievably lost ....click on the **Close Workbench** button to close Workbench.

Logging in again

If there is a temporary document, the system will check to see if it is still editable and if it has been edited at all since it was saved to the temporary file.

If the document is still editable and has not been edited then the **Restore externally saved document** dialog will appear offering various options as to how to proceed:-

- Hit the **Now** button to invoke the **Edit complete** dialog (exactly as if you had just finished an edit). The temporary file will be saved to the database and on completing the **Edit complete** dialog, it will close.
- If you choose to hit the **Later** button, then the **Restore externally saved document** dialog will close but the document information will remain and the system will check on the document status and produce the appropriate dialog the next time you log in.
- If you select **Delete Copy**, then the system will ask for confirmation that this is what you really want to do. If 'Yes', then the temporary file and all related entries will be deleted and the dialog will close.
- If you select **View Copy**, then the system will display the temporary copy of the document in its default viewer. The dialog will stay open.

If the document is still editable but has been edited the **Restore externally saved document** dialog offers different ways to proceed:-

- If you hit the **Now** button in this instance, the system will warn you that you will be overwriting another user's changes and ask for confirmation. If confirmation is given then the **Edit complete** dialog will appear (as if you had just finished an edit) and the temporary file will be saved to the database. After the **Edit complete** dialog has been completed, the dialog will close.
- The other three buttons (**Later**, **Delete copy** and **View copy**) behave exactly as given for the case where the document has not been edited - see above.
- A new button, **View Curr. Draft**, if selected will invoke the most recent Draft version of the document held in the system.

If the document is no longer editable, the **Cannot restore externally saved document** dialog will appear offering the following options:-

- If you select **Yes** then the temporary copy of the document and all references to it will be deleted.
- If you select **No** then all references to the document will be deleted but the document itself will not be deleted. The dialog will then close.
- If you select **View copy** then the program will display the temporary copy of the document in its default viewer. The dialog will stay open.

2 Updates for Workbench 11

Workbench 11 includes several new features and updates, many that have been introduced at the request of current users. They are intended to enhance the product and give greater ease of working. None of the existing functionality of Workbench has been removed. Access settings for each area of configuration have been retained; visibility and access to changes will still depend on access rights.

NB. **Wherever reference is made (in Help topics) to the 'system administrator' this includes any user who also has access to the relevant options in the System Manager module. Because the configuration options are so many, we strongly advise that access to the System Manager is very strictly controlled.**

Full details of all updates are given in each relevant Help topic in respective modules.

2.1 General system updates

The following general system updates have been added to Workbench 11.

- A new workflow setting *Automatically delete completed tasks* is switched off by default; if checked, then all completed tasks will automatically be deleted.
- A warning appears if the Caps Lock is on whilst typing a Password. This applies to the Workbench Login dialog and all other dialogs where a password is required.
- User Defined Analysis labels have been increased to accept up to 255 characters.

2.2 Audits module

The following features have been added to the Audits module for Workbench 11. For full details, please see the relevant Help topics in the Audits module.

- The main audit's Search Code, User Reference (if any) and Planning Notes/Scope are now carried over and shown on the same page when editing a checklist or entering results of an audit.
- When viewing, editing or running an audit there is an *Expand all* check box on the **Audit Checklist** page. When checked, all categories and checklist items can be seen.
- It is now possible to add attachments to audit templates. The **Create** and **Edit Audit Template** dialogs now show an Attachments button. If attachments are added to a template, they will be carried across when an audit is based on that template.
- When reporting an NCR from an audit, the **NCR Summary** field now allows up to 255 characters.

2.3 Customer Care module

The following features have been added to the Customer Care module for Workbench 11. For full details, please see the relevant Help topics.

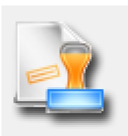
- The Analysis (UDA) page is now available for viewing in **Process Corrective Action**.
- A User-defined Action button has been added to the **Report Complaint** and **Report Assessed Complaint** dialogs.

2.4 Document Control module

The following features have been added to the Document Control module for Workbench 11. For full details, please see the relevant Help topics.

- A new item in the **Control** menu - **Reissue Document** - allows documents to be reissued.
- The *Notify user of new issue* Distribution Options workflow setting will be amended to *Notify user of new issue/reissue* - to take account of the above new menu item.
- The *Retain previous issued versions* Distribution Options workflow setting will be removed when using the **Reissue Document** routine.
- Three new workflow settings headed **Workbench Questionnaires** control whether questions will be asked when acknowledging receipt of a document. You may specify whether a questionnaire is to be used or not; if used you may then specify how many random questions will be asked and the minimum number of correct answers required to be returned.
- There is now the ability to define what increments are to be used for Document Revision numbers. This will be controlled by a new workflow setting *Auto increment document revision* that is off by default. If checked, then three further workflow settings will be enabled allowing you to select a *Major revision increment*, a *Minor revision increment* or *Default edit severity* from a drop-down menu.
- There is a new workflow setting *Do not prompt users to delete source document* that defaults to unchecked. If checked, the **Confirmation** dialog, offering the user the option to delete the source file, will not be displayed when the document has been imported.
- A new workflow setting *Automatically delete source document* may be set if the *Do not prompt users to delete source document* setting (above it) is checked. If both settings are checked the imported file will be deleted automatically. If unchecked, the file will remain.
- A new workflow setting *Include document synopsis in external mails* defaults to off.
- There is now an **Attributes** button on the **Issue Document** dialog.
- The **Document Attributes | Changes** page now has 'Date Raised' column.
- There is now the ability to check out a document in one format and check it back in another format.
- Additional non alpha-numeric searches may now be configured by the system administrator.

2.5 Nonconformities module



A major new feature in the Nonconformities module is the addition of **NCR Action Templates**. This function offers you the ability to assign automatically a set of actions based on a business rule.

The following features have also been added for Workbench 11. For full details, please see the relevant Help topics in the Nonconformities module.

- A new menu item - **Report Assessed NCR** - works in exactly the same way as **Report Assessed Complaint** in the Customer Care module. This means that reporting and assessing an NCR can be done at the same time providing that the reporter also has rights as an assessor or if the NCR has already been assessed prior to its entry into the system.
- The **NCR Severity** field can now be made mandatory via a new workflow setting.
- **Report NCR** and the **NCR Wizard** will now have **Customer** and **Contact** fields (as in the Customer Care module) and these can be made mandatory via a new workflow setting. The same customer and contact records will be referenced by both the Nonconformities and Customer Care modules.
- A User-defined Action button has been added to the **Report NCR** and **Report Assessed NCR** dialogs.
- The **NCR Final Review** option (**Mark Nonconformity Ready for Sign-off** dialog) now includes a **Schedule Course** button which takes you directly to the **Create Scheduled Course** dialog.
- There is now the option for a nonconformity to reference several other NCRs. When first reporting an NCR, the new page tab is labelled **NCR References**; once the NCR has been reported, the page tab is labelled **References** and includes both Document and NCR references.
- When creating action plans or assigning corrective actions you may flag up if an action is considered to be the 'root cause' of an NCR. The *Is Root Cause* check box appears on the **Create Action Template** and **Assign Corrective Actions** dialogs and defaults to unchecked.
- You may now assign **User Defined Analysis** to corrective actions; this is an option for ALL actions but may be particularly useful in conjunction with Root Causes (see above). These are set up in the **Settings** menu just like Nonconformity UDAs and then selected when configuring the corrective actions.

2.6 System Manager module

The following feature has been added to the System Manager module for Workbench 11. For full details, please see the relevant Help topic.

- The **Create Access Template** dialog now has a new Search field that allows you to select an existing access template on which to base a new one. Access rights (but only access rights) will be carried over to the new template.

2.7 Test & Calibration module

The following feature has been added to the Test and Calibration module for Workbench 11. For full details, please see the relevant Help topic.

- When searching through Equipment you may now search 'within Type'.

3 Common features and routines

Workbench uses certain common routines and techniques throughout the system; a familiarity with these will greatly assist your initial explorations of the software.

3.1 Altering the width or order of columns

On certain dialogs in Workbench, mainly **Select** dialogs, you may grab the lines separating columns **in order to make the columns wider or narrower...**

1 Using the mouse, point the arrow at the chosen line within the title bar.

2 When the head of the arrow changes to a small double vertical line with black arrows pointing outwards, click on the line.

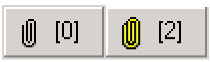
3 Drag the thickened line to its new position and the chosen column width.

It is also possible in some dialogs to arrange the columns in a different order...

1 Click and hold down on the heading of the column you wish to move. A black vertical line will appear at the left hand side of the column.

2 Drag to the right or left until the column jumps to its new position.

3.2 Attachments



The Attachments button appears throughout Workbench and will usually be situated at the top right of a dialog and shows a paper-clip symbol with a number in brackets alongside. When no attached files exist, the 'paper-clip' will be black and the figure will be (0). When attachments exist, the paper-clip is yellow and the figure alongside shows how many attachments there are.

Files may be attached to a number of Workbench records; these files are stored within the normal Workbench database and are accessible via the record to which they belong. Examples of the usage of attachments might be scanned evidence for NCRs, customer letters in the Customer Care module, external certificates in Test and Calibration, feedback forms and certificates in the Training module etc.

Access to attachments relates entirely to the access rights to the parent record. **New**, **View**, **Edit** and **Delete** buttons will be visible and active dependent upon the logged-in user, the status of the parent record and whether attachments already exist. You may only add, edit or delete attachments if you have edit rights to the parent record. Users with **View** rights may view attached files but cannot edit or delete them.

Regardless of the module and routine that you are accessing the Attachments Form from, the dialog works the same. The header will change according to the appropriate module / routine eg. **Complaint Attachment Form**, **Review Attachment Form** etc.

Adding a new attachment

Modifying an existing attachment

3.2.1 Adding a new attachment

Files may be attached to many records in Workbench; these files are stored within the normal Workbench database and are accessible via the record to which they belong.

1 Click on the Attachments button in any relevant dialog. The **Attachment Form** will open. The top part of the dialog gives details of the complaint / change request / review etc. that the Attachment relates to.

2 The middle part of the form, Attachments, shows a list of files (if any) already attached to the Complaint / CRQ / Nonconformity etc. To add an Attachment, click on the **New** button. An Attachment Number will be generated by the system and will appear in the bottom part of the form, Attachment Details. The **File Name**, **Attachment Title** and **Extension** fields will then all become mandatory.

Every area where Attachments apply will start from '1' and further Attachments will be numbered sequentially. If an Attachment is deleted there will be a gap in the run of numbers, ie. each Attachment keeps its original number for its 'life-time'.

(The Attachment Number and Attachment Title in the middle part of the form will be entered automatically once the bottom part of the form has been completed and the Attachment saved.)

3 You may also import a Workbench document (subject to required access rights) as an Attachment. These may then be used and edited to highlight changes (when raising a change request) or reasons for rejection (when rejecting a document).

Click on the **Workbench Documents** button to invoke the **Select Document as Attachment** dialog from where you may select the relevant document to attach.

All the fields on the bottom part of the **Attachment Form** will be filled in automatically if a Workbench Document is selected as an Attachment, but all may be amended apart from the *Attachment Number* and the *File Name*. Copy in red will also be added, stating that the Attachment is a copy of a Workbench Document and giving the date and time when the copy was taken. Be aware that the Attachment is a COPY and any subsequent amendments to the actual document still stored within Workbench will not be updated to the Attachment.

IT IS VERY IMPORTANT TO NOTE THAT BY ATTACHING WORKBENCH DOCUMENTS IN THIS WAY, USERS WHO MAY NOT NORMALLY HAVE ACCESS RIGHTS TO THE ATTACHED DOCUMENT MAY NOW BE ABLE TO SEE IT. 'Normal' document access rights will be surrendered once a Workbench document becomes an Attachment - the access rights governing whatever it is attached to, take over control of who may view the copy.

4 If you are not attaching a Workbench document, go to the bottom part of the form, Attachment Details, and enter a mandatory **File Name** and **Extension**. (If you use the **...** button to browse and select the file name, the extension will be entered automatically.) Editing and Viewing Options (if applicable - see Document Control **| Master templates**) will also be entered automatically once an extension has been entered.

5 Give the attachment a mandatory **Attachment Title**; this can mimic the File Name or be something much simpler. The Attachment will be referred to by this title throughout its life.

6 Add any **Notes** and **Save**. The Attachment Number and Attachment Title will be copied up to the middle part of the dialog.

To cancel the new attachment before saving, use the **Cancel New** button.

When a new attachment is added, an appropriate entry will be made to the document's History log.

3.2.2 Modifying an existing attachment

You may only edit or delete attachments if you have edit rights to the parent record.

1 Click on the Attachments button in any relevant dialog. The **Attachment Form** will open. The top part of the dialog gives details of the complaint / change request / nonconformity etc. that the Attachment relates to.

2 The middle part of the form, Attachments, lists existing attached files. Highlight the required Attachment to edit (if more than one) and click on the **Edit** button. Remember to save the changes to the actual Word document after you have edited it and then save again for the Attachments change in Workbench.

   If the list of attachments is long, use the Search button to search either Attachment Number (F3) or Attachment Title (F4).

3 To edit Attachment Details, simply highlight the required Attachment (in the middle part of the form) to bring up its details in the bottom part of the form. Modify the selected attachment details as required and / or add further notes and **Save**.

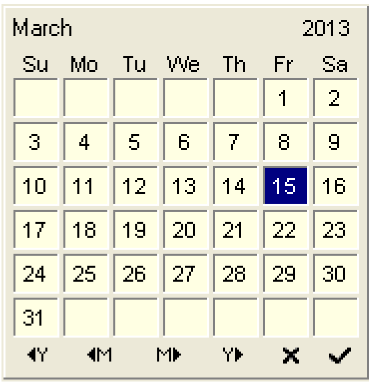
   NB. Any edits to the actual attached document will not be saved until the **Attachment Form** itself is saved.

The **View** button allows you to view the attached document. The **Delete** button (if present) allows users with edit rights to the parent record to remove an attached document.

Modifying or removing an attachment will write an appropriate entry to the History log of the relevant document.

3.3 Date button

This button gives you a visual aid to plan dates; it displays the current date when first opened.



To alter the date, click on the relevant new day in the main window.

Browse previous months(M) or years(Y) with the bottom left arrows.

Browse future months(M) or years(Y) with the bottom right arrows.

Click the tick to enter the selected date in the box next to the Date button (in the correct format). Click the cross to close without entering a date.

Alternatively you can simply select the correct month and year and then double-click on the required day. The calendar will close and the chosen date will be entered automatically in the box next to the Date button.

3.4 Double-clicking & right-clicking

When first getting to know the module it is worth checking to see if double-clicking will save time in any of the operations. Most Workbench programs support double-clicking in a variety of ways; it is left to the user to decide which of these may benefit their way of working.

Right-clicking on the window of a record sometimes displays a pop-up menu offering an option to print, or direct access to other parts of the module or to other modules.

3.5 Four figure year dates

The Workbench system year dates are always shown as four figure numbers, ie. 2013, not just 13. It will be easier if your version of Windows is configured in the same way; if you are not sure how to do this, please refer to your Windows manual.

NB. If your Windows settings are set to two digit year dates, the system will force you to use four digits when a date is entered.

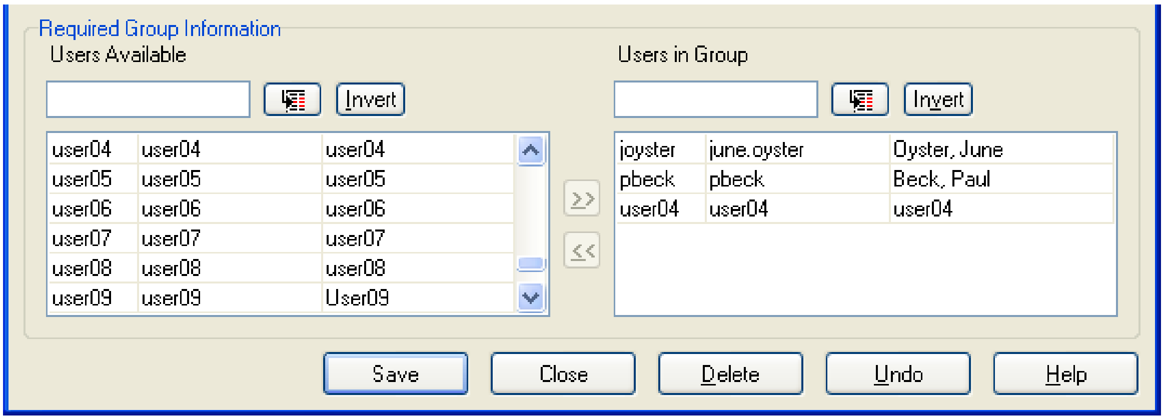
3.6 Grey type and closed fields

When type appears grey rather than black, it signifies that it cannot be edited. Similarly, fields that appear solid or 'closed' cannot be entered.

Both these cases occur when their use would not be appropriate, eg. grey type because a record cannot be altered; closed boxes when the field is not applicable in certain circumstances.

3.7 Groups / Lists

Workbench uses a common routine to add / remove names to / from lists. This routine is used for setting up groups, templates, departments, suppliers etc.



1 In the left hand list (eg. Users Available), highlight the name(s) you wish to add to the selected right hand list (eg. Users in Group). More than one consecutive name can be highlighted at the same time using the keyboard **Shift** key; highlight more than one name not listed consecutively, using the **Ctrl** key.

2 Click on the central add **>>** button and the name(s) will transfer to the right hand side.

Alternatively, simply double-click on the required name(s) to move them from one side to the other.

Where the list of names is long, you may use the Search button to search for known personnel. If you wish to select the majority of names from a list, use the Invert button.

To remove selected names, highlight in the right hand list and click on the central remove **<<** button (or double-click).

3.8 Invert button

There are many situations in Workbench where you may wish to select one or more records from a list of available ones. For instance, you may be asked to select all users in a specific group from a list of all available users. Selecting such a group is simply a matter of highlighting the names you require.

The Invert button reverses the selection you have made, ie. it 'de-selects' the highlighted records and highlights the rest. This is very useful when you wish to include the majority of a list - you can select a few records on an exclusion basis and then quickly invert the list.

Where appropriate, you may select a consecutive group of names by depressing the keyboard **Shift** key whilst making the selection; names which do not fall consecutively can be selected at the same time using the keyboard **Ctrl** button.

3.9 Mandatory fields

Certain fields throughout Workbench are essential or mandatory; ie. until they are completed you will not be able to save the record you are working on.

Such fields are shown in blue and are underlined, giving you an immediate visual indication that they are compulsory eg. **Login to which database?** and **Login** in the **Log on to Workbench** dialog.

Until all mandatory fields are completed, **Save** or **OK** buttons will be disabled.

3.10 ReportQuest

This module gives you the opportunity to generate and design your own reports, utilising the full range of information stored in the Workbench database.

One of many impressive features of ReportQuest is that it can be operated with little technical knowledge, as the complex data structure and links can be hidden from the user and reports laid out using a 'wizard'. However, for users who prefer to build their own, more detailed layouts, ReportQuest offers many ways to achieve this.

Report creation in ReportQuest can be divided into four main activities:-

- selection of data
- the layout or design, showing how the report should look
- manipulation of the data or layout in order to control the generation of the report more precisely
- generation of the actual report.

3.11 Screen display & keyboard shortcuts

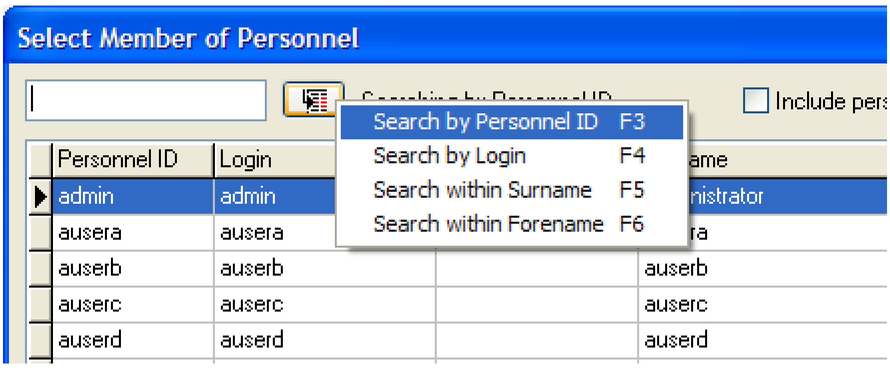
- You may configure the main Workbench screen by moving different menu bars - to do this grab the vertical line on the left of any individual menu bar and drag the bar to its new position. Moves are saved locally so that an individual user's set-up will be retained.
- On every menu title in each module there is an underlined letter; this is the keyboard letter to press in order to invoke that menu. For example, the letter **F** in all **File** menus is underlined. Press the keyboard **F** (or **f** - it is not case sensitive) to open the **File** menu. In the Document Control module, the **D** is underlined in the **Documents** menu signifying that this is the key to press to open the Documents menu.

  You may then use the keyboard 'up' and 'down' arrows to select the menu option you require and then hit the **Enter** key to open the dialog, In this way you may move around the modules, menus and menu options without having to use the mouse.
- A right-click menu on the screen enables you to show or hide the Calendar button, Menus, Modules, Notifications button, Speedbar (Speed buttons), Tasks button and/or Web Page independently. **NB**. There are several workflow settings covering the usage and display of web pages see Personal workflow settings.

3.12 Search button

The search button is probably the single most widely-used feature throughout Workbench. Its purpose is to allow you to browse easily through records and locate the one you are seeking by whatever methods are appropriate to that information.

These search options will differ depending on the kind of information you are searching through. For example, searching for personnel offers searches by Personnel ID, Login, within Surname or Forename; simply use whichever is most convenient.



Right clicking on a Search button displays the search options available in a ‘pop up’ menu. Each option on the menu has a keyboard shortcut; this may be quicker to use as you become more familiar with the system and its search options.

Simply left clicking a Search button defaults to the search method last employed.

To locate a specific record or set of records you must first key in the characters you wish to search on in the selection box to the left of the Search button. Then use the search method required from the menu (or the function key equivalent). For instance, typing in ‘Hard’ on a personnel search and choosing F5 (Search within Surname) will return all users with the characters ‘Hard’ within their surname, eg Hardy, Harding etc. If no matching records are found, a message is displayed.

Most search types look for exact matches to their respective fields. However some, as the example above, look for the string anywhere within the field. A good example of this is the search for a document ‘within Title’. Here the system looks for whatever you have keyed in anywhere within the document’s title. Thus a search for ‘procedure’ will find any document with that word in its title. This can be extremely useful when you are unsure of the exact wording of a document title. Unlike the other search types, a search within a field is not case sensitive. The above example therefore will pick up documents with ‘Procedure’ or ‘PROCEDURE’ embedded somewhere within the title.

NB. To ensure that the whole list of records appear in any search dialog, the search field alongside the search button must be cleared before starting a new search. To do this, highlight any text there, delete it and then click on the Search button or activate one of the keyboard shortcut keys.

3.13 Search routines

The method for locating personnel records is a good example of the generic search routines found throughout Workbench. The **Select User**, **Select Complaint Type**, **Select Tester** dialogs etc. use the same routine. On certain Select dialogs there is an additional check box:-

- in **Select Member of Personnel** the extra check box determines whether the records returned by the search should include personnel who have left the company or show only current employees (the default). Workbench does not delete leaving personnel; they are marked as having left and their records retained for historical purposes. The records are therefore available for this type of search should you need them (see example below).
- in **Select Departments**, **Select Document Categories** and **Select Document Types** (when accessed from the **Settings** menu) there is a check box at the top of the dialog that allows records that have been hidden to be shown. By default, hidden records will not be shown in search grids. To reveal all records, including those that have been hidden, click on the check box marked *Show hidden Department* (or Category etc.)

Searching for a record in a Select dialog (using Select Member of Personnel as an example)

1 From the **Record** menu in the **Personnel** module, choose **Personnel**. The **Select Member of Personnel** dialog will appear.

2 Anyone who has a leaving date entered in their records will not, by default, be included in the search. If you wish to include Leavers, please check the box - *Include personnel who have left.*

3 Select the required member of personnel (or Complaint Type, Category etc. if appropriate) using one of the following three methods:-

- use the Search button to search for a known member of staff (or Complaint Type, Personnel ID etc.)
- highlight the required name (scroll if necessary) and click **OK**
- double-click on the required name.

The chosen record will then open.

3.14 Sorting and ordering

The symbols shown on the column headers below show which column is controlling the sort - and whether this is in ascending or descending order. The column that has an arrow and one short horizontal line alongside (as opposed to two short horizontal lines) is the one controlling the sort and the arrow indicates whether the order is ascending or descending.

In the example shown below, the grid would be sorted by the Search Code, alphabetically from A to Z.

ID	Search Code	Name	Course	Type	Start Date
5	allnewstaf	All new staff	First steps		12/05/2008
1	firstaidat	First Aid at Work	First Aid at Work	F_AID	24/07/2008

To move the sort to a different column, click on the required column header and click again to toggle between ascending and descending order. In the example shown below, the grid would be sorted by the Name column, alphabetically Z to A.

ID	Search Code	Name	Course	Type	Start Date
8	qualitywor	Quality Workbench	Quality Workbench	Management	15/05/2008
7	producttes	Product Tester	Product Tester	IT	07/04/2008

3.15 Speed buttons

The most commonly used menu items in each module have 'speed' buttons, appearing on the Speedbar (the right-click menu on the main screen allows you to show / hide the Speedbar). If the Speedbar is selected, the speed buttons will be shown on the main toolbar for each module and repeated alongside the relevant menu item. If a user does not have access to a menu item that has a speed button, they will not be able to see the speed button.

The module (that has speed button options) must be selected before its buttons will appear.

See the separate Help topic in each module for details of icons used.

3.16 User defined action button

The Customer Care, Document Control and Nonconformities modules each support a specific user-definable action (with a direct link to an editor) against appropriate complaints, documents and NCRs. For example, in the Customer Care module the action button could be used to automatically produce a letter of acknowledgement and apology; in the Nonconformities module it could be used to produce an incident form.

The user-defined action is set up by the system administrator on the **Module Settings** page of the **Workbench Configuration Centre**; the button that 'triggers' the action will then appear on relevant dialogs in the respective modules. When the button is triggered from any of these dialogs, the program writes all the requisite customer / complaint, document or nonconformity information to an easily accessible file and can optionally launch any application.

A History entry is also recorded whenever the button is clicked.

4 System menus

Several menu options are common to more than one Workbench module:-

The File, Module and Help menus are always present on the main menu structure, irrespective of the particular modules you have purchased and installed.

The Product option (**Settings** menu) is used by the Customer Care, Nonconformities, Test and Calibration modules.

The Suppliers option (**Settings** menu) is used by the Audits, Customer Care, Nonconformities, Test and Calibration, and Training modules.

The User Defined Analysis (UDA) option is found in the **Settings** menu of individual modules and can be set up for different areas eg. Personnel UDA in the Personnel module, Supplier and/or Course UDA in the Training module. The only modules that do not use User Defined Analysis are ReportQuest and the System Manager module.

User Defined Reports can be accessed from all modules apart from Personnel and System Manager.

You may configure the screen by moving around different menu bars - to do this, grab the two small vertical bars to the left of any individual menu bar and drag to its new position. Moves are saved locally so that an individual user's set-up will be retained.

A right-click menu on the screen enables you to show or hide the Calendar button, Menus, Modules, Notifications button, Speedbar (Speed buttons),Tasks button and/or Web Page (with appropriate permissions) independently.

4.1 File menu

Irrespective of the Workbench modules you have purchased and installed, the **File**, **Module** and **Help** menus will always be present on the main menu structure. Most **File** menu items will always be visible. However, access to the **User Preferences** and **Workstation Settings** dialogs is controlled by the system administrator; unless appropriate access rights have been granted, you will not be able to see them.

File | Where Am I?

This menu item allows you to check the currently selected database.

NB. You may also check by looking in the lower right of the main Workbench window; the current database and time are displayed in the status bar.

File | Who am I?

Shows your current Login and whether your access rights are granted individually or via templates (see Setting user access levels).

File | Login to Database

Using this option, a user currently logged in to a Workbench database can easily switch to another ‘on the fly’, ie. without having to exit the system and re-enter.

If you are already logged in to the system and wish to change your login while remaining connected to the same database, you may do so in this menu option. Effectively this allows you to log in as a different user. See Logging on to Workbench.

File | User Preferences

If viewed in its entirety, this is a four-page dialog allowing you to set up various preferences covering the look and workings of your own machine. Here you may also change your own password and decide which other user(s) should be allowed to process tasks on your behalf, in case of absence.

However, access to this menu item and to each individual page is controlled by the system administrator. Please see the separate Help topic, User preferences, for full details of all aspects of this dialog.

File | View Issued Document

Providing that the Document Control module is installed, the **View Issued Document** dialog will appear in all other installed modules. It operates in exactly the same way as **Documents | View Document** (in the Document Control module), but shows only issued documents to which the user has access.

File | Quick document links

Providing that the Document Control module is installed, the *Use document quick launch facility* setting is set in the **Workbench Configuration Centre |** Workflow Settings (New User Settings / Personal) and the *Number of links to most recently viewed documents setting* is set between 1 and 10, then the last viewed documents (up to a maximum of 10 and dependent on the *Number of links...* setting) will also be available for viewing here. They will be listed most recent first.

File | Workstation Settings

Here you may set up a default database, login and dictionary for Workbench. You may also select which Workbench server to connect to and, optionally, whether the list of servers displayed should be restricted to only those that are running - see Workstation settings.

File | Exit

Allows you to exit Workbench.

4.1.1 User preferences

The **User Preferences** dialog allows users with access, to configure various aspects of their own working practices. Any changes made to these preferences are logged on the **History** page.

The dialog consists of five pages in total but access to each is controlled by the system administrator. You will not be able to see any of the pages you have not been given access to.

- Password - enables you to change your own password. (However, this page is redundant and therefore not present if Windows authentication is being used.)
- **Preferences** - this page has four options. Help buttons are square with a grey question mark on them. Access to each option is controlled by the administrator; so it is possible that you may not see all of the four options:

  Preferences | Mail Options - allows you to forward all external mail messages to another user

  Preferences | Workload Manager Options - allows you to forward your Workload Manager tasks to another user

  Preferences | Dictionary Language Setting - allows you to choose the language used in a specific database

Preferences | Document Display Settings - allows you to specify which fields appear in the **Select Document** display grids.

- Delegates - allows the selection / de-selection of other user(s) to act on your behalf.
- Workflow Settings - displays personal settings that, with appropriate access, can be set by individual users.
- Personal History - logs changes made to User preferences.

4.1.1.1 Changing your own password

The **User Preferences** dialog allows users with access, to configure various aspects of their own work station and working practices. Any changes made to these preferences are logged on the **Personal History** page.

The dialog consists of five pages in total but access to each one is controlled by the system administrator. You will not be able to see any of the pages you have not been given access to.

The **File | User Preferences | Password** page enables any user to change their own password, providing they know their current password. This page will not be present (regardless of access rights) where Windows authentication is being used, unless the logged-in user is 'admin'.

1. Type in your old (current) password in the **Current Password** field.
2. Type in your new password in the **New Password** field. The new password must not contain more than 12 characters and must conform to the **Password Constraints** listed at the bottom of the page (if any) - for further information on these constraints, see Password configuration.
3. Click the **Apply** button to confirm the change - or move to any of the other pages before clicking **OK**, which closes the dialog. You will be asked to confirm the new password.

If a user has forgotten their old password, the only remedy is for a new password to be entered in the System Manager module using Configuration | User Logins | Change Users Password.

4.1.1.2 Forwarding external mail

The **User Preferences** dialog allows users with access, to configure various aspects of their own work station and working practices. Any changes made to these preferences are logged on the **Personal History** page.

The dialog consists of five pages in total but access to each one is controlled by the system administrator. You will not be able to see any of the pages you have not been given access to.

The **File | User Preferences | Preferences** page has four separate functions the first of which is **Mail Options**.

1. If you are set up to use external mail, your mail address will be displayed and the **Test** button will be enabled (use this to test the mail address). Use the **Forward external mail to** option to forward all your external mail messages (sent via Workbench or IntraVista Professional) to other user(s), until you clear the instruction. **NB**. This user (or users) must also be set up to use external mail.
2. Click on the Search button to select the required user. Once another user has been entered to receive forwarded mail they will continue to receive this until their name is cleared from the **Forward external mail to** field (or the **Clear** button activated).

   Mail messages that have been forwarded show the original owner of the task with the message 'This mail has been forwarded from <name of original recipient>'.

NB. If Delegates have been assigned to you (either by the administrator or because you have set them up yourself), the list of personnel in the **Select Personnel for Mail Forwarding** dialog will be restricted to those delegates (and only those who are also set up to use external mail).

3 Click on the **Apply** button (at the bottom of the dialog) to save the preference.

You may then configure any of the other preferences on the page before clicking **OK**, which closes the dialog.

Whenever an action is carried out as a result of forward messaging, its corresponding history entry is suffixed with an asterisk (*). Right-clicking on theses entries will then provide details of the user who undertook the action - for an example of this see **Document Attributes | History** in the Document Control module.

NB. If mail attachments are sent via IntraVista Professional and are forwarded on to another user who subsequently carries out the action, the history entry will show that the action was carried out 'on behalf of' the original user.

Workload manager options Dictionary language setting Document display settings

4.1.1.3 Workload manager options

The **File | User Preferences | Preferences** page has four separate functions the second of which is **Workload Manager Options**.

If you wish to forward your Workload Manager tasks to another Workbench user you may do so using this option. Tasks will continue to be sent to the nominated user until cleared (using the **Clear** button).

4.1.1.4 Dictionary language setting

Workbench allows you to translate a selected database into the language you choose. Languages are set up in InterLingua and then selected on the **Preferences** page of **File | User Preferences**.

Available languages are listed in the Dictionary Language Setting box, bottom left. Simply highlight the preferred language for the database you are logged into and hit the **Apply** button.

4.1.1.5 Document display settings

Document Display Settings are originally selected by the system administrator on the **Module Settings** page of the Workbench Configuration Centre. The settings specify which fields will be displayed in Select Document display grids (Document Control module) and the order in which these fields will appear.

However, the system administrator may grant individual access to this option (see Setting user access levels), in which case the user may override the defaults and select which fields they want to appear on their own machine (and the order). However, for users who have checked the workflow setting *Use DocLists for document classification and filtering*, Document Display Settings will not be relevant and will therefore be disabled per database, per user (as the DocList workflow setting); a red message at the bottom of the Preferences page will alert you when this is relevant.

For users with appropriate access, the **Document Display Settings** option is found on the **Preferences** page of the **File | User Preferences** dialog.

Setting up display settings

The option is identical whether invoked by the system administrator in the System Manager module or by an individual user from the **File** menu. It consists of two lists, Fields available and Fields displayed, with central add (**>>**) and remove (**<<**) buttons which enable copying entries from one list to the other. The Display settings are set per database (where individual access is denied) or per user per database where individual access has been granted.

1 From the 'Fields available', list highlight the fields you want to appear in **Select Document** grids and click on the central **>>** button (or double-click). The chosen fields will move to the 'Fields displayed' list and will form the headings for the columns in all Select Document grids; they will range from left to right in the top to bottom order that they are selected.

   To de-select 'Fields displayed', highlight and click on the central **<<** button (or double-click).

2 When the list is as you want it, click on the **Apply** button. An Information message will confirm that your preferences have been updated.

3 Configure any of the other preferences on the page before clicking **OK**, which closes the dialog.

4.1.1.6 Delegates

Delegates, who may approve documents or CRQs on your behalf, are set up in two separate places, depending on whether you are setting them up for yourself or for other approvers.

- Setting up your own delegates is via the **Delegates** page of the **User Preferences** dialog.
- System administrators (or other users with relevant access) may set up delegates for other users using **Configuration | User Logins | Assign Delegate Users**.

Both dialogs default to allow all individual users and personnel groups to be delegates.

Access to the two levels of delegation is controlled in separate options by the administrator in the **Access** menu options (System Manager module). This means that users can be given access to set up their own delegates but are unlikely to have access to assign delegates for other users.

NB. The administrator is allowed to approve documents and change requests on behalf of any user without the need for delegation to be set up.

Setting up delegates for yourself

1 Select **User Preferences** from the **File** menu and go to the **Delegates** page.

2 The **Delegates** dialog will appear showing a list of all users and groups with valid logins (apart from admin. and the selected user).

3 To select from lists, the check box marked *Allow all users to act as a delegate for me* must be de-selected (the default is selected).

4 Add or remove delegates by double-clicking or using the central arrow buttons. The list on the left hand side of the window shows users and groups available for delegation (you may have a combination of both lists). The right hand lists show selected delegates.

5 Click **Apply** to set up the delegates as you wish and to continue working in the **User Preferences** dialog. Click **OK** to save the selected delegates and close the dialog.

A 'Delegates changed' entry will be written to the **Personnel History** page for the user. Right-click on this entry to reveal the names of delegates added or removed.

The only user(s) who will now be able to see and therefore approve documents or change requests on behalf of the original user (**Control | Approve Document For** and **Changes |**

Approve Change Request For in the Document Control module) will be those who have been nominated as delegates.

Assigning delegates for other approvers

Providing that you have been granted access to the **Assign Delegate Users** dialog you may also set up delegates for others as well as yourself. To do this...

1. Select **Configuration | User Logins** in the System Manager module and choose **Assign Delegate Users** from its walk-right menu.
2. The **Select Member of Personnel** dialog will appear listing all users with a valid login.
3. Select the user for whom you wish to assign delegates. Double-click or click **OK**.
4. The **Set Delegates** dialog will appear showing a list of all users and groups with valid logins (apart from admin. and the selected user).
5. Proceed as for above, **Setting up delegates for yourself** (from 3 onwards).

4.1.1.7 Personal workflow settings

Personal settings are originally selected on the **Workflow Settings** page of the Workbench Configuration Centre (where they are shown as **New User Settings**) and cover various low priority aspects of a user's workstation and working practices. For users with appropriate access, these p ersonal workflow settings are also found on the **Workflow Settings** page of the **File | User Preferences** dialog where they are referred to as **Personal** workflow settings.

These settings may also be adjusted per user, if required, on the **Workflow Settings** page of personnel records - **Record | Personnel** in the Personnel module or **Personnel | Details** in the Training module. In these two dialogs the same settings are again referred to as **Personal** settings.

As well as granting Read access to **Personal** workflow settings, the system administrator may also grant Update rights (see Setting user access levels), in which case the individual user may override the defaults for the logged-into database. Any changes made to these settings are logged on the Personal History page of the same dialog, which is also updated by the **Edit User / Edit Member of Personnel** dialog (see Creating personnel records).

Configuring Personal / New User Settings

1. On the **Workflow Settings** page of the **Workbench Configuration Centre** (or any other dialogs mentioned above), tick the *Expand all workflow settings* check box to display the full list of settings. (Any item in the list with a plus sign alongside means there are further, hidden items in the list; a minus sign alongside means that that part of the list has been fully expanded.)
2. Highlight the appropriate setting (descriptions of each follow). The *Use this workflow setting?* check box will open at the bottom of the page allowing you to select or de-select as required. A tick alongside the setting in the list indicates that that setting is being applied.
3. To select a **Default module**, highlight and a **Setting value** field will open. From the drop-down menu, select the module you wish to have as default.
4. When you have configured the settings as you wish, click on the **Apply** button. An information message stating that the preferences have been changed will follow and you may continue working on other aspects of the dialog. Alternatively, click **OK** to save and close the dialog.

- *Send tasks to self* - When task and notification messages are sent, the system looks to see if the logged-in user and the person to whom the message is to be sent are the same. If this option is checked then you will receive all user-generated task messages even if you instigated them yourself (eg. if you mark a document ready for approval where you are on the approval list, you will still receive a task message asking you to approve the document). If unchecked, you will only receive tasks generated by users other than yourself.

- *Send confirmation notifications to self* - When notification and task messages are sent the system looks to see if the logged-in user and the person to whom the message is to be sent are the same. If checked you will receive all user-generated notifications even if you instigated them yourself. If unchecked you will only receive notifications generated by users other than yourself.
- *Display options \ tool tips* - when checked, this option displays ‘fly by’ Tool tips (ie. when you hold the cursor at the bottom of selected buttons). Changes made here take place next time the user logs in.
- *Display options \ status bar* - when checked, the currently selected module, database, date and time information will be displayed at the bottom right of the main Workbench screen. De-select to hide. Changes made here take place next time the user logs in.
- *Display options \ Display a WEB page in Workbench main dialog* - when checked and providing that the relevant System Wide web page settings (set by the system administrator) are also checked, allows an individual user to set up the display of a WEB page as a back-drop to their main Workbench dialog.
- *Display options \ WEB page address* - providing that the above setting and the relevant System Wide web page setting(s) are also checked, allows an individual user to set up a chosen WEB page to display.
- *Display options \ Only show count of outstanding tasks on task button*. This setting defaults to 'Off'. If checked, the number of tasks shown alongside the Tasks button on the main Workbench toolbar will include only those tasks that are outstanding.
- *Default module* - in the **Setting value** field, choose the module (from the drop-down menu) to be selected automatically on future start-up. If you have a Module licence, this must be chosen here in order for the module licence to 'kick in'; otherwise a System licence will be used.
- *Show 'View Document' dialog when logging into Workbench*. This setting defaults to 'Off'. If checked, the **View Document** search screen loads automatically when the user logs in, provided that all relevant licensed areas and access rights have been verified. Further verification assures that if responding to mail, then it is not affected.
- *Use document quick launch facility* - A registry of the last 10 documents viewed is kept and when this setting is checked, these documents (up to a maximum of 10) may be displayed under the **File** menu option as a quick link for viewing.
- *Number of links to most recently viewed documents* - providing that the above option is checked this setting will be enabled and will default to 10. You may change this to any number between 0 and 10 but if zero is selected, no links will be maintained.
- *Use Windows login profile for sending Microsoft mail messages* - defaults to being checked and in this state automatically uses the main Windows login (the one the user logs on to their own personal workstation with) when sending Microsoft mail messages. If unchecked, then a Profile must be set up in the user's Personal records.
- *Use DocLists for document classification and filtering* - when checked, will allow an individual user to set up the DocList format for document selection dialogs (as used in IVPro).
- *Automatically delete completed tasks* - defaults to off. If checked, the system will automatically remove all completed tasks.

4.1.1.8 Personal history page

History pages track all changes made to dialogs that they are attached to; this includes the logging of who took the action and the date / time of occurrence. Entries are often made 'globally', for example, 'Delegates changed'; right-clicking on this type of entry will reveal further information.

The page is strictly read-only and information here is updated not only by the **User Preferences** dialog but also from **Personnel** and **Training** records and from the Workflow Settings in the **Workbench Configuration Centre**.

Entries may be filtered using the **Filter** button at the top right of the page. The **Filter History Display** dialog is self-explanatory - selected items in the list will be displayed, those that are not highlighted will not be shown.

A red 'warning' at the bottom of the **History** page will show whether the list has been filtered.

4.1.2 Workstation settings

This dialog allows you to configure various settings for your own workstation.

1 From the **File** menu choose **Workstation Settings**. Select settings using the details below.

- Choose a **Default Database** from the drop-down menu; the system will automatically select this database on future start-up
- Enter a **Default Login** which you will then not have to key in on future occasion; you will, however, still be required to enter your password (if you have one).
- The top check box marked *Automatically login* is enabled providing that a default database has been entered, that the selected database is configured for Windows authentication and that a password is not required to login to the database. If checked, then the system will automatically login to the selected database on start-up.
- If the system has been configured for you to use a Workgroup licence (per database) when logging in automatically, select the bottom check box in order to over-ride this default and use a System licence instead (see Types of licence).
- Choose the **Default Dictionary Settings** from the drop-down menu; this setting controls the language of all elements that are not attached to a specific database (eg. Login, Workstation Settings, File and Help menus, Licence Manager etc). This is different from the **Dictionary Language Setting** found on the User Preferences dialog that controls the language of the database itself.

  NB. The server can be set up to disallow the configuration of language settings. In this case the **Default Dictionary Settings** option will be view only.

- The **Server Location** controls how the application 'talks' to the server. It is set up automatically when the application is installed and there should be no need to change the settings under normal circumstances.

  Server Address specifies the IP (Internet Protocol) address of the server.

  Server Name allows a DNS name to be entered if appropriate. **NB**. A Server Name, if used, will over-ride a Server Address.

  Server Port Address cannot be changed.

  Display server list - when checked, allows the Workbench Client to select which Workbench Server to connect to (where multiple servers are installed). If unchecked, then the Workbench Client automatically connects to the last Workbench Server that it was connected to.

  Only display running servers - this option can only be selected if *Display server list* (above) is checked; if both are checked then the list of multiple Workbench Servers is restricted to only those servers that are currently running. If this option is not checked, then all Workbench Servers are displayed in the list regardless of whether they are running or not. **NB**. The multiple Workbench Servers list is displayed before the Client Loader appears (ie. the very first dialog that you will see when loading up the system).

2 Click **Save** to save any changes and restart Workbench to activate the change(s).

4.2 Module menu

The Module menu gives access to other modules in the Workbench system. Only modules subscribed to by your organisation will be available for use (apart from the Personnel and System Manager modules that are installed as an integral part of other modules).

4.3 Help menu

The Help menu items give a complete guide to the very comprehensive on-screen Help system and provide general information on Workbench licences. The Help system in Workbench is context sensitive - clicking a **Help** button at any time takes you straight to the help you need for the situation you are in.

Help files also assume that you have either Workbench Professional or Quality Workbench with all optional areas licensed. Any areas not licensed will not be available.

4.4 Products and suppliers

Whenever a specific product is involved, for example in a nonconformity, a customer care issue or for test and calibration purposes, it is useful to record the details of the product and those of its supplier, if known. Workbench makes independent provision to record full details on suppliers - including name, address, telephone numbers and information on named contacts.

In normal business practice training courses are sometimes provided by external suppliers; likewise it may be necessary to carry out an audit on external suppliers. The Training and Audits modules therefore use the same Suppliers records dialog (see **Scheduling courses** in the Training module and **Compiling a checklist** in the Audits module).

Details of products and suppliers are recorded in the **Settings** menu. A product code (ID) is allocated when details are first set up and this is searched for using a Search button in dialogs where a product is to be recorded. Products cannot be entered 'on the fly' - they must always be created in the Settings menu first. Suppliers records may be set up 'on the fly' in the Test and Calibration module only.

NB. The same Product and Suppliers dialogs are used by all Workbench modules. If you are denied access to either of these menu options in any module, you will automatically be denied access in all other modules.

See also:

Product records

Selecting suppliers

Setting up new suppliers

Recording new contacts

Editing details of suppliers and/or their contacts

4.4.1 Product records

The same product records are used by the Customer Care, Nonconformities and Test & Calibration modules. If you are denied access to this menu option in any module, you will automatically be denied access in all other modules.

Setting up a new product record

1. Select **Product** from the **Settings** menu to open the **Select Product** dialog.
2. Click on **New**.
3. In the **Create Product** dialog enter a mandatory product **ID** and a **Name** - the **Search Code** will automatically follow the Name but can be changed.
4. If you wish to nominate a product to supersede the named product - eg. if it becomes impossible to obtain supplies or if there is a known defect in the original product, an alternative product can be registered in the **Supersession** field. Use the Search button to select from the full list of products.
5. The *Manufactured* radio button will be selected by default; if appropriate, enter a **Manufacturing Cost**.

   If the product is *Externally Supplied*, select this radio button instead; the **Manufacturing Cost** field will close but the **Suppliers** page will be activated where you may select suppliers appropriate to the product (see Selecting suppliers).
6. Enter any **Notes**.
7. Complete the **Suppliers** page where relevant.
8. Click **Save** and continue inputting any further products or **Save** and **Close**.

Editing an existing product record

1. Select **Settings** from the main menu.
2. Choose **Product** from its pull-down menu and the **Select Product** window will appear.
3. Select the required record using any method (see Search routines).
4. In the **Edit Product** dialog all fields may be edited, apart from the product **ID**. You may also add notes and amend supplier(s) on the **Suppliers** page if required.
5. **Save**.

4.4.2 Selecting suppliers

Supplier records may be set up in several modules; lists of Suppliers will include suppliers recorded in any other module that contains this menu item. If you are denied access to suppliers in any module, you will automatically be denied access in all other modules.

Selection of suppliers uses a routine common throughout Workbench (see Groups / Lists).

1. Click on the **Suppliers** page (in **Settings | Product** the Suppliers page will only become active after you have completed the mandatory fields and selected the *Externally Supplied* radio button on the **Product** page).
2. Select suppliers by moving them from the left hand side of the window to the right.
3. When you have selected all the appropriate suppliers, **Save** and **Close** or continue to input other products and select suppliers.

If you need to set up new suppliers, close the Select Product window to return to the main menu. Then see Setting up new supplier records. If selecting suppliers via the **Search** button and the **Select Supplier** dialog, see Search routines for help if required.

4.4.3 Setting up new supplier records

The same supplier records are used by the Audits, Customer Care, Nonconformities, Training and Test & Calibration modules. If you are denied access to this menu option in any module, you will automatically be denied access in all other modules.

Setting up a new supplier record

1 Select **Settings** from the main menu and choose **Suppliers** from its pull-down menu. (**NB**. In the Test and Calibration module only, Suppliers may be set up 'on the fly' from the **Equipment Register** dialog.)

2 In the **Select Supplier** dialog click on **New**.

3 The **Supplier ID** and **Name** are mandatory fields. The **Search Code** will automatically follow the Name but can be changed. The Supplier ID cannot be edited in any way, once saved.

4 Enter as many or as few other details as are relevant for the supplier - on all pages.

5 Enter any **Notes**.

6 **Save**.

All suppliers' information (apart from Supplier ID) may be edited at any time in the future using the Suppliers menu option in the Settings menu only.

Analysis page

User-definable analysis displayed on the **Analysis** page is initially set up in the **Settings** menu (**User Defined Analysis | Suppliers**). Analysis categories displayed here can be attached to the currently selected supplier in the following ways:-

- select (or de-select) check box categories by clicking in them
- select predefined values from the drop-down list in combo boxes
- add values 'on the fly' using additive combo boxes (or select from a predefined value in the drop-down list). Any new value set up here will be added to the drop-down list and available for future selection.
- enter a 'one-off' value using a free text box.
- enter a date or date and time (using the Date button if preferred).
- enter currency and/or numeric fields (up to the specified number of characters).

You can select only one value per field (in drop-down lists or combo boxes); boxes should be left blank if neither the field nor any of its values apply.

Save the page when complete; if no UDA is applicable, move on to the next page.

Contacts page

Specific contacts within firms of suppliers can be recorded on the Contacts page, see Recording new contacts.

4.4.4 Recording new contacts

1. Select the **Contacts** page in the **Create Supplier** dialog (after specifying a **Supplier ID** and **Name** on the **Supplier** page); details of contacts already recorded will be listed here.
2. To enter details of a new contact, click on **New**.
3. **Surname** is the only mandatory field. Enter as many or as few other details as you wish.
4. Enter any **Contact Notes** if appropriate.
5. Click on the **Save** button to save the contact and continue adding further new contacts or **Save** and **Close**. The Contact(s) you have just recorded will now appear in the list on the first **Contacts** page window in the **Create Supplier** dialog.
6. Click on **Save** and close all dialogs.

4.4.5 Editing details of suppliers and/or their contacts

1. Choose **Supplier** from the **Settings** menu; the **Select Supplier** window will appear.
2. Select the appropriate supplier, edit any details on the **Supplier** and/or **Analysis** pages (apart from the **Supplier ID**) and click on **Save**.
3. Click on the **Contacts** page to edit details of contacts.
4. Highlight the appropriate contact and click **Select** (or double-click on the required contact).
5. Edit the contact’s details, click on **Save**.

   A contact's records may only be deleted (using the **Delete** button) if they are not used in any supplier records in any installed module.
6. **Save** in the **Edit Supplier** dialog and then **Close** the **Select Supplier** dialog.

4.5 User definable analysis categories

The ability for you to determine your own analysis categories and their associated values is present throughout Workbench and is a very powerful customisation feature. The User definable analysis element is licensed separately and, if purchased and installed, UDA will always be set up in the **Settings** menu of each individual module. Wherever a module offers more than one type of analysis category, this is offered from a walk-right menu.

Different categories must each be set up separately, but this is done in exactly the same way; the various categories then become available for selection in appropriate **Analysis** dialogs.

The same user-defined analysis records are referenced by all installed modules that use UDA; for example, the same Suppliers UDA will be used in Test and Calibration, Training and in NCRs.

Analysis can be categorised in eight different ways:-

- the Drop Down List displays a set of predefined values for a given attribute. This list is used whenever you wish to associate a set of predefined values with a category. These might be used to attribute, say, a specific cause to a nonconformity, chosen from a drop-down list of alternatives when the nonconformity is reported.
- the Check Box offers a straightforward on/off toggle for attributes that either apply or do not apply. An example might be ‘Inform Health and Safety?’. You then simply check or uncheck this box as appropriate when recording information.

- an Additive Combo box lists certain predefined values that may be added to 'on the fly'. These values are produced as a drop-down list and any value added in this way becomes 'global' and is added to the list for future use. **NB**. User defined analysis categories are included in IVPro in both the **Report Complaint** and **Report NCR** routines. However, as values cannot be added on the fly in IVPro, additive combo boxes function simply as drop-down menus.
- the Free Text box. This allows you to add specific text (up to 255 characters - user definable) that may apply on a one-off basis (eg. the name of an external reviewer).
- Date Only. Choose this category if you wish to add an analysis field that will allow you to attach a specific date to the record. The field will automatically incorporate a date button.
- Date and Time. Choose this category to add analysis fields that will allow you to attach a specific date and time to the record. The field will automatically incorporate a date button.
- Currency. Choose this category to name a currency analysis field (eg. price in sterling, dollars, lire etc.). The field can be sized to allow for up to 20 characters; you may also stipulate the number of digits after the decimal point.
- Numeric. Choose this category to add a numeric analysis field. The field can be sized to allow for up to 20 characters; you may also stipulate the number of digits after the decimal point.

4.5.1 Setting up user defined analysis

User-definable analysis (UDA) can only be set up in **Settings** menus; the required analysis categories must then be selected on **Analysis** dialogs whenever appropriate. The process of setting up analysis categories is identical for all modules. The only modules that do not use User Defined Analysis are ReportQuest and the System Manager module.

Creating user defined analysis fields and values

1. From the **Settings** menu (in any relevant module), choose **User Defined Analysis**.
2. In modules where there is a choice of user defined analysis, choose one from the walk-right menu. The **Analysis Maintenance** dialog will open.
3. To enter a new **Analysis Field** (of any type) click on the **New Field** button (bottom left side of the window).
4. Type in a new **Analysis Field** where the cursor is blinking - field labels may contain up to 255 characters.
5. Press the return key to enter another analysis field or continue to define the type and values (if appropriate) for the current field.
6. With the required analysis field highlighted, select the Field Type 'radio' button. For all analysis fields except Drop Down List or Additive Combo this completes the input required.
7. To define field values for a Drop Down List or Additive Combo, click the **New Value** button (on the right hand side of the window).
8. Enter the initial **Field Value** for the selected analysis field.
9. Press the return key to save the new **Field Value** and prepare to enter another. Repeat this process until all the relevant entries have been made in the **Field Values** field.
10. Highlight another **Analysis Field** in the left hand side of the window to add values to if required; click on **Save** when all fields/values have been entered.

The **Maximum Field Length** for analysis fields defaults to 255 characters; currency and numeric fields default to 20 characters maximum; date/time fields are pre-defined and automatically incorporate a date button; check boxes offer a simple on/off choice. To alter a maximum field length, simply delete the shown number and type in the preferred length. The **Number of Digits after a Decimal** point may also be specified (where appropriate).

You may enter as many different fields and values as you wish and relevant fields may have as many values attributed to them as required. If the number of defined categories fills up the screen, a scroll bar will appear allowing you to scroll down and continue inputting information.

Fields and/or values may only be edited or deleted if they have not been ‘attached’ to a record. However, a check box near the bottom of the left hand side of the dialog, *Hide field?*, allows you to 'hide' any highlighted analysis field. As hidden fields can't be seen they can no longer be selected on **Analysis** pages, but previously stored information may still be used for reporting purposes.

In the **Nonconformities** module only, selected UDA (apart from a check box) may be made mandatory for Nonconformities and/or Corrective Actions, but not for Suppliers. This can be done at the time of creating the new field or can be done later by highlighting the required field(s) and checking the *Is Mandatory?* box. Then, on **Analysis** dialogs for relevant NCR reports, any UDA field that has been marked as mandatory must be completed before the NCR report can be saved.

The ⏶ Up and ⏷ Down buttons are used to navigate the lists of fields and values and to determine their order.

NB. Please avoid using ampersands (&) in this dialog; spell out the word in full where necessary or use a back-slash - eg. Health and Safety or Health\Safety.

4.5.2 Selecting user defined analysis

UDA categories, originally set up in Settings menus are available for selection on Analysis pages.

NB. In the Document Control module, user defined analysis is classed as a Document Attribute (Document attributes / Analysis page).

Selecting user defined analysis

1. Click the **Analysis** page on the main dialog.
2. Select appropriate predefined values from drop-down lists.
3. Relevant check boxes should be checked or unchecked.
4. In additive combo boxes you may select from a pre-defined value in the drop-down list (if present) or add a new value. Any new value set up like this will be added to the drop-down list and available for future selection.
5. In free text boxes, enter a one-off value that will apply to the currently selected record only.
6. Enter a date or date and time (using the Date button if preferred).
7. Enter currency and/or numeric fields (up to the specified number of characters).

   You can select only one value per field (in drop-down lists or combo boxes); boxes should be left blank if neither the field nor any of its values apply.
8. When you have completed the page, click on **Save**.

4.6 User defined reports

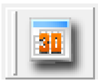
For users with appropriate access, this dialog gives read-only access to **ReportQuest** (if you have it installed). Please refer to the ReportQuest Help system for full details on this module.

5 Tasks, Notifications and the Calendar

On the main toolbar there are three buttons in addition to the buttons showing other installed Workbench modules.

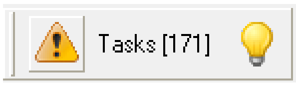
The Tasks button advises personnel that they are being asked to perform a task. A workflow setting (see New User Settings) controls whether the number of tasks shown include all tasks or only those that are outstanding.

The Notifications button is used to inform personnel that certain events have taken place.



The Calendar button gives direct access to a calendar that shows important events and deadlines recorded in all installed modules.

5.1 Tasks button



This button’s main function is to notify users that there is a task they are being asked to perform. It invokes a list giving a quick overview of the user's tasks, the actionee, the date the task was sent and a due date for the task to be carried out if applicable etc. The figure next to the word ‘Tasks’ signifies the number of listed tasks (unless configured to show only outstanding tasks - see Personal workflow settings); the 'light-bulb' appears yellow when there are unread task requests and white when all messages have been read. To view the task requests, click on the Tasks button.

For most tasks, you may gain immediate access to the dialog relating to the task you are required to perform by clicking on the relevant message; however, Completed and/or Superseded task requests cannot be entered this way. Also, when tasks have been completed or superseded, the task request does not disappear; the user must delete it by right-clicking or by pressing the keyboard **Delete** key.

The Tasks window can be stretched by placing the pointing tool at either side (or bottom) of the window; when the pointer changes to a double-headed arrow, click on the frame and pull to the side (or down). Alternatively you may maximise the screen using the standard Windows shortcut in the top right corner.

The title bar for each column also acts as a button; this allows you to re-order each column. Simply click in the title bar to re-order a column from bottom to top.

To alter the width of columns, particularly the Description column where text may be partly hidden, place the pointer tool in the title bar at either the left or right hand side of the column you wish to increase or decrease. When the pointer tool changes to a double-headed arrow, click on the line between the two columns and when the line appears thick, drag to the position required.

A brief description of each column function follows.

Read column

This column shows whether the message has been read or not. A yellow 'light bulb' signifies that the message has not been read; after opening, the light bulb appears white. **NB**. You may mark a message that has been read, as 'Unread' (ie. make a white light bulb appear yellow again) by right-clicking on the relevant message and selecting 'Mark as unread'. You may also delete tasks and/or notifications using the right-click menu.

Status column

The status of tasks (Outstanding, Completed or Superseded) is shown here. The **Filter** menu describes the icons used. Overdue tasks are highlighted with the icon of a 'ringing' alarm bell.

Description column

In this column a brief description of the notification or task request is given.

Priority column

Priority levels are set up in the System Manager module (**Configuration | Priority**) and then selected, if required, from a drop-down menu in the Priority column.

1. Click in the **Priority** column of a chosen task and a drop-down menu will appear.
2. Select the required priority level to be attached to the selected task.
3. Then to prioritise the list, click on the **Priority** title bar. The tasks with highest allocated priority will appear at the top of the list followed by other prioritised tasks in weighting order.

Date Sent column

The date and time that the notification or task request was sent. By default, tasks (and notifications) are sorted by this column, the most recent at the top. Click on any other column header to sort by that column.

Date Due column

The date (and time) that the required task is due to be completed by.

Origin column

This column shows an icon of the module where the task request or notification originated. The **Filter** menu shows descriptions of the icons used.

Actionee column

Shows the person responsible for actioning the task.

5.2 Tasks button menus

The **User** menu enables you to see other selected users' tasks, providing that you have access rights. See Viewing other users' Notifications and Tasks.

The **Filter** menu shows the types, status and sources of tasks; click on icons to filter them out of the list. Items that do not have a ‘tick’ against them will be filtered out of the list of tasks. To clear the filter (ie. to include all messages), click on the top option ‘Clear filter’.

5.3 Notifications button

This button’s main function is to invoke the list of messages that notify users when certain specified events take place. The figure next to the word ‘Notifications’ signifies the number of messages listed; the 'light-bulb' appears yellow when there are unread messages and white when all messages have been read. Old messages will not automatically be removed from the list when read; delete them by choosing from the right-click menu or using the keyboard ‘Delete’ key.

To view the messages, click on the **Notifications** button. You may gain direct (read-only) access to the relevant dialog by double-clicking on the appropriate message.

The Notifications window can be stretched by placing the pointing tool at either side (or bottom) of the window; when the pointer changes to a double-headed arrow, click on the frame and pull to the side (or down). Alternatively, maximise the screen using the standard Windows shortcut in the top right corner.

The title bar for each column also acts as a button; this allows you to re-order each column. Simply click in the title bar to re-order a column from bottom to top.

To alter the width of columns, particularly the **Description** column where text may be partly hidden, place the pointer tool in the title bar at either the left or right hand side of the column you wish to increase or decrease. When the pointer tool changes to a double-headed arrow, click on the line between the two columns and when the line appears thick, drag to the position required.

Column functions are as for the Tasks button apart from ‘Recipient’…

Recipient column

With the necessary access rights it is possible to view other users' notifications (see Viewing other users' Tasks and Notifications). The Recipient column shows whose notifications you are currently viewing.

5.4 Notifications button menus

The **User** menu enables you to see other selected users’ notifications, providing that you have access rights. See Viewing other users’ Tasks and Notifications.

The **Filter** menu shows the types and sources of notifications; click on icons to filter them out of the list. Items that do not have a ‘tick’ against them will be filtered out of the list of notifications. To clear the filter (ie. to include all messages), click on the top option ‘Clear filter’.

5.5 Viewing other users’ Tasks and Notifications

The Tasks / Notifications **User** menu enables you to select other users in order to view their task requests and/or notification messages, providing that you have access rights (see Access to Tasks and Notifications).

To view other users' messages

1 Click on the **Tasks** or **Notifications** button.

2 Select **User** from the menu.

3 Choose **Select Users** from its drop-down menu.

4 Select the user(s) whose tasks or notifications you wish to view and move from the left to the right hand side of the window (See Groups / Lists). De-select using (<<).

5 Click on **OK**.

The Tasks (Notifications) list will now show messages for the chosen user(s). If there is more than one user, their order can be altered by clicking on the **Actionee** column header (Tasks) or **Recipient** column header (Notifications).

Other users' messages are read-only - you will not be able to enter or edit them. With appropriate access you may delete other users' notifications using the right-click menu.

5.6 Access to Tasks and Notifications

There are three levels of access to task and notification messages (and calendar entries) that are controlled by the system administrator in the **Set User Access Levels** dialog (see Setting individual user access).

(i) Message access to users reporting to you

(ii) Message access to all users

If a user is granted ACCESS to only (i), only messages of other users reporting directly to them will be accessible.

If a user is granted ACCESS to (ii) they will have access to all other users' tasks and notifications.

If ACCESS is denied to (i) and (ii) then the user will only have access to their own messages.

Regardless of the access, users apart from the system administrator may only view another user's tasks or notifications; therefore other users cannot:-

- open a task or notification
- change the priority of a task
- delete a task or notification.

NB. The same level of access granted for tasks and notification messages will also apply to entries on the Calendar.

Deleting other users' notifications

The third access option *Delete access to all user notifications*, (**Access | Set User** / **Templates**), allows the administrator to control whether a user may or may not delete other users' notifications. If access is granted to this option, open the **User** menu on the Notifications dialog and select the user(s) whose notifications you wish to delete. Then select the bottom option from the right-click menu, *Remove all displayed users notifications* to remove the required notifications.

NB. If you do not wish to remove your own notifications, make sure you have de-selected yourself in the **Select User** dialog.

5.7 Configuring external task messages

All internal task messages will always be sent. However, the system administrator (or any user with access) may decide which external Task messages and/or all Notification messages may be suppressed for a whole module, or for specific messages. Changes take effect the next time a user starts the relevant routine.

These options are configured on the **Tasks** and **Notifications** pages of the **Workbench Configuration Centre** and can be set up individually for Task messages and/or for Notifications.

Some tasks have different text but essentially the same action is required; these messages have an asterisk against them. If you highlight any of these, a message will be displayed at the bottom of the dialog - Text may vary depending on the context in which this is used.

For example, the task message *Please close/stop review** as listed on the **Tasks** page covers several different circumstances:-

- Review of document close date reached. Please close
- All reviewers have completed review of document. Please close review
- All reviewers have completed review of document. Please stop review

Configuring which external task messages should be sent

1 Select the **Configuration** menu in the System Manager module and choose **Workbench Configuration Centre** from its drop-down menu.

2 Select the **Tasks** page - the default is set for all tasks to be sent.

3 To send/suppress task messages for a whole module, highlight the required module. The *Send external tasks for this module* check box at the bottom of the dialog shows whether messages are currently being sent or not. If the check box is checked, all external tasks for that module will be sent; if unchecked, external messages will not be sent.

   To send/suppress specific task messages, double-click on the required module or click on the **+** sign alongside the relevant module. The complete list of task messages for the selected module will be shown - those messages with a tick alongside are currently being sent. Highlight the required message and de-select the check box at the bottom of the dialog marked *Send external tasks of this type?* if you don't want that type of message to be sent.

   To restart the sending of task messages for a module or of a specific type, highlight the module (or message) and tick the check box again.

   The *Send external tasks for this module* check box will be disabled if one or more message within that module is currently suppressed. It will be blank when a highlighted module has all its task messages suppressed.

4 When the settings are as you want them, click **Apply** to update and continue configuring other parts of the dialog. Clicking **OK** will close the dialog. Changes will take effect the next time the specific routine is started.

NB. The configuration of task messages in this way is for those sent externally only.

See also: Configuring notifications

5.8 Configuring notifications

The system administrator may decide which Notifications (if any) should be sent - for a whole module, or for specific messages. Changes take effect the next time a user starts the relevant routine. These options are configured on the Notifications page of the **Workbench Configuration Centre**.

Some notifications may have different text but the message covers the same action; these notifications have an asterisk against them. If you highlight any of these, a message will be displayed at the bottom of the dialog saying - Text may vary depending on the context in which this is used.

An example is the Nonconformities notification - *Nonconformity assessed** - applicable for the following messages:-

- NCR has been accepted
- NCR has been rejected
- NCR has been deferred

To configure which notifications should be sent

1 Select the **Configuration** menu in the System Manager module and choose **Workbench Configuration Centre** from its drop-down menu.

2 Select the **Notifications** page - the default is set for all tasks and notifications to be sent.

3 To send/suppress notifications for a whole module, highlight the required module. The *Send notifications for this module* check box at the bottom of the dialog shows whether messages are currently being sent or not. If the check box is checked, all notifications (internally and externally) for that module will be sent; if unchecked, notifications will not be sent.

   To send/suppress specific notifications, double-click on the required module or click on the **+** sign alongside the relevant module. The complete list of notifications for the selected module will be shown - those messages with a tick alongside are currently being sent. Highlight the required message and de-select the check box at the bottom of the dialog marked *Send notifications of this type?* if you do not want these type of messages to be sent.

   To restart the sending of notifications for a module or of a specific type, highlight the module (or message) and tick the check box again.

   The *Send notifications for this module* check box will be disabled if one or more message within that module is currently suppressed. It will be blank when a highlighted module has all its notifications suppressed.

4 When the settings are as you want them, click **Apply** to update and continue configuring other parts of the dialog. Clicking **OK** will close the dialog. Changes will take effect the next time the specific routine is started.

See also Configuring external task messages

5.9 Messages generated by the Audits module

	Message & Type	When Sent	Sent to	Supersedes
1	Audit scheduled (N)	When the audit is first scheduled	Lead auditor	

2	Audit scheduled (N)	When the lead auditor is changed	New Lead auditor	
3	Please run audit (T)	When the audit is first scheduled	Lead auditor	
4	Please run audit (T)	If the Lead auditor or Actual Start date is changed after the Planned Start date has passed	Lead auditor	3
5	You are no longer responsible for audit (N)	When the lead auditor is changed	Old Lead auditor	3, 4
6	You have been assigned as an auditee on audit due (N)	When the 'inform auditees on' date is reached	All auditees	
7	You have been assigned as an auditee on audit due (N)	Sent to any new auditees added after the 'inform auditees' date has passed. **NB**. Not sent if auditee(s) added at run time	All new auditees	
8	Audit is now scheduled for (N)	If the planned start date for an audit is changed after notification 6	All auditees who were originally sent notification 6	

5.10 Task and Notification messages

Most modules, once installed, will generate task and/or notification messages that may also be sent externally if configured to do so (see Configuring external task messages and Configuring notifications). A brief description is given in separate topics (see below) of which users the message is sent to and when the message is sent.

Audits messages

Customer Care messages

Document Control messages

Nonconformities messages

Test and Calibration messages

Training messages

Workbench message

5.10.1 Messages generated by the Customer Care module

	Message & Type	When Sent	Sent to	Supersedes
1	Complaint reported (N)	When a complaint is reported	Notification list for complaint if rules are in use; else any user with access rights	
2	Please assess complaint (T)	When a newly reported complaint is saved	Assessment list for complaint if rules are in use; else any user with access rights	
3	Complaint assessed and accepted by (N)	When the complaint is accepted	Reportee of complaint	1
4	Complaint assessed and rejected by (N)	If the complaint is rejected at the assessment stage	Reportee of complaint	

5	Complaint severity changed to <level> (N)	If the complaint severity level of an assessed and open complaint is changed	Complaint actionee(s); owner if not the person who changed the severity level	
6	Complaint severity cleared (N)	When a complaint severity level is cleared using the ' Change Complaint Severity' dialog	Complaint owner	
7	Please process complaint (T)	When a complaint has been accepted	Complaint owner	
8	Please process complaint action (T)	When a new action has been assigned by the complaint owner	Action assignee	
9	Complaint action assigned to another user (N)	When a corrective action has been re-assigned by the complaint owner	Original action assignee	8
10	Complaint action rejected (N)	If the assignee of an action rejects it	Complaint owner (not sent if complaint owner and action assignee are the same person)	
11	Complaint action accepted (N)	When the assignee of an action accepts it	Complaint owner (not sent if complaint owner and action assignee are the same person)	
12	Complaint action completed (N)	When the owner of an action completes it	Complaint owner (not sent if complaint owner and action assignee are the same person)	
13	Complaint action overdue (N)	When an action has reached its completion date	Complaint owner (not sent if complaint owner and action assignee are the same)	
14	All CAs completed. Complaint ready for final review.	When all actions for the complaint have been completed	Complaint assignee	
15	Complaint sent for sign-off (N)	When final review has taken place	Sign-off list for notification if rules are in use; else users with menu access	7
16	Please sign off complaint (T)	When final review has taken place	Sign-off list for task if rules are in use; else users with menu access	
17	Complaint rejected at sign-off stage by (N)	If one person on the sign-off list rejects the complaint	Complaint owner plus sign-off list for notification if rules are in use	16
18	Complaint accepted at sign-off stage by (N)	When a person on the sign-off list signs off	Complaint owner	
19	Complaint sign-off complete (N)	When all on the sign-off list have signed off	Complaint owner plus Sign-off list for task if rules are in use	
20	Complaint escalated to response band (N)	When a complaint is escalated through a response band	Complaint owner	7
21	Complaint escalated at highest response band (N)	When a complaint is escalated to the next response band	Notification list on the response band is reached	
22	Complaint overdue (N)	When response bands are not being used and the date and time due for the complaint (if set) has been reached	Complaint owner	
23	Please accept transfer request for complaint (T)	When a transfer request has been raised for a complaint	Potential complaint owner(s)	
24	Please accept complaint escalated to response band (T)	When a complaint is escalated to a response band	Potential complaint owner(s)	
25	Complaint transfer request accepted by (N)	When a transfer request has been accepted	Original complaint owner	23

26	Complaint transfer request rejected by (N)	When a transfer request has been rejected	Original complaint owner	
27	Please accept transfer request for complaint action (T)	When a transfer request has been raised for an action	Potential action owner(s)	
28	Complaint action transfer request accepted by (N)	When a transfer request has been accepted	Original action owner	27
29	Complaint action transfer request rejected by (N)	When a transfer request has been rejected	Original action owner	

5.10.2 Messages generated by the Document Control module

	Message & Type	**When Sent**	**Sent to**
1	Please approve document (T)	If the approval list is unordered, then when the document is marked for approval. If the list is ordered the task is sent to the first person on the list at this point and others in turn when the previous person has approved	Approval list
2	Please approve unassigned document (T)	When an unassigned document (ie. no approval list) is marked for approval	Owner
3	Please issue document (T)	When a document has been completely approved	Issue list. If no issue list, then owner
4	Document rejected (N)	When a document is rejected	All users if unordered list. All users who have approved if ordered list. Admin and owner if no list. Owner always
5	Document rejected on your behalf by <name> (N)	When the 'Approve Document For' dialog is used	Document approver(s)
6	Please approve change request (T)	When a CRQ is raised When a New Document CRQ is raised	For all except new document CRQ: if CRQ list, all users on list, else if doc. approval list, all users on that list, else owner. If new document CRQ, nominated approver else admin
7	** Content change request approved. Please edit document (T)	When the content CRQ the user raised is fully approved	CRQ actionee if any, else owner
8	Change request rejected (N)	When a CRQ is rejected	Owner unless new document CRQ. Person who raised CRQ. Assignee. All approvers (see 4)
9	Change request rejected on your behalf by <name> (N)	When the 'Approve Change Request For' dialog is used	CRQ approver(s)
10	Change request approved completely (N)	When a CRQ has been completely approved	CRQ requester, owner and assignee
11	Change request approved on your behalf by <name> (N)	When a CRQ is approved by a delegate	Original CRQ approver
12	Content CRQ approved, but document does not allow editing (N)	When a content CRQ is fully approved but the Document workflow setting 'Edit document content' is switched off	Assignee. Owner
13	Change request approved. Please create new document (T)	When a new document CRQ has been completely approved	CRQ actionee if any, else admin
14	Withdraw CRQ approved, but document does not allow withdrawal (N)	When a withdraw CRQ is fully approved but the Document workflow setting 'Withdraw document' is switched off	Owner
15	Please action approved change request (T)	When an Edit List, Distribution List or Document Attribute CRQ is fully approved	Actionee of an Edit List, Distribution List or Document Attribute CRQ

16	Change request actioned (N)	When a new document, distribution list or edit list change request is actioned	Owner and CRQ requester
17	Change request assigned by <name> (N)	When an approved but not assigned content CRQ is assigned (Next Revision Level dialog) by the Actionee	Owner
18	Change request un-assigned by <name> (N)	When an assigned content CRQ is un-assigned (Next Revision Level dialog) by the Actionee	Owner
19	Change request re-opened by <name> (N)	When a CRQ is re-opened by the Actionee	Owner
20	Change request marked as done by <name> (N)	When a CRQ is marked as done by the Actionee	Owner
21	Change request assigned for <name> by <name> (N)	When a CRQ is assigned by a user on behalf of the Actionee	Owner
22	Change request un-assigned for <name> by <name> (N)	When a CRQ is un-assigned by a user on behalf of the Actionee	Owner
23	Change request re-opened for <name> by <name> (N)	When a CRQ is re-opened by a user on behalf of the Actionee	Owner
24	Change request marked as done for <name> by <name> (N)	When a CRQ is marked as done by a user on behalf of the Actionee	Owner
25	Change request assigned on your behalf by <name> (N)	When a CRQ is assigned by a user on behalf of the Actionee	Original CRQ Actionee
26	Change request un-assigned on your behalf by <name> (N)	When a CRQ is un-assigned by a user on behalf of the Actionee	Original CRQ Actionee
27	Change request re-opened on your behalf by <name> (N)	When a CRQ is re-opened by a user on behalf of the Actionee	Original CRQ actionee
28	Change request marked as done on your behalf by <name> (N)	When a CRQ is marked as done by a user on behalf of the Actionee	Original CRQ actionee
29	Description of change request modified (N)	When an unauthorised change request has its details or reason fields altered	Person who raised the request
30	Change request overdue (N)	When a CRQ target date (for re-issue of document) is reached	Owner and person who raised the request
31	Document issued. Please acknowledge receipt (T)	When a document is issued with acknowledgement required	Distribution list
32	Document reissued. Please acknowledge receipt (T)	When a document is reissued with acknowledgement required	Distribution list
33	Added to distribution list for document. Please acknowledge receipt (T)	When a user is added to the distribution list for a document that has been issued and required acknowledgement	Personnel added to the distribution list (including replacement personnel for a user who is marked as left)
34	Added to distribution list for document (N)	When a user is added to the distribution list for a document that has been issued/reissued and where no acknowledgement is required	Personnel added to the distribution list (including replacement personnel for a user who is marked as left)
35	Removed from distribution list for document (N)	When a user is removed from the distribution list for a document that has been issued and not withdrawn	Personnel removed from distribution list unless user is being marked as left
36	Document marked ready for approval (N)	When a document is marked ready for approval	Owner
37	Document approved on your behalf by <name> (N)	When a document is approved by a delegate	Original document approver
38	Document issued (N)	When a document is issued without acknowledgement required	Distribution list
39	Document reissued (N)	When a document is reissued without acknowledgement required	Distribution list
40	Please withdraw document (T)	When a change request to withdraw a document has been fully approved	Owner

41	Document withdrawn (N)	When a document is withdrawn	Owner, requester and all users on distribution list
42	Changes to document since last issue undone (N)	When the ‘Undo changes since last issue’ command is used	Owner
43	Draft document deleted (N)	When a draft document is deleted	Owner
44	** Document rejected. Please edit document (T)	When an edited document is rejected	The last user who edited the doc. If no last editor, then the person who created or imported the document
45	You are now responsible for document review (N)	When a responsible review person is selected	User nominated with responsibility
46	You are no longer responsible for document review (N)	When a new responsible review person is selected	‘Old’ user nominated with responsibility
47	Please start review of document (T)	When the review start date is reached	User nominated with responsibility
48	** Scheduled review of document started. Please process (T)	When the review is started	User nominated with responsibility
49	** Unscheduled review of document started. Please process (T)	When the review is started	User nominated with responsibility
50	Please respond to review for document (T)	When the review is started	Reviewer(s)
51	** All reviewers have completed review of document. Please stop review (T)	If all reviews are finished before the close date	User nominated with responsibility
52	** All reviewers have completed review of document. Please close review (T)	When all reviews are finished	User nominated with responsibility
53	** Review of document close date reached. Please close (T)	Sent from the Maintain Scheduled / Unscheduled dialog when review date is reached.	User nominated with responsibility
54	Review of document closed. Please complete (T)	When the review is stopped or closed	User nominated with responsibility
55	Please respond to unscheduled review request of document (T)	When an unscheduled review is submitted	User nominated with responsibility
56	Request for unscheduled review of document rejected (N)	If the review is rejected	Person requesting the review
57	Review of document closed (N)	When the review is closed	Reviewer(s)
58	Review of document complete (N)	When the review is completed	User nominated with responsibility
59	Scheduled review due to start - document currently undergoing change (N)	When the review start date is reached	Document owner and user nominated with responsibility
60	Review of document withdrawn (N)	When the review is withdrawn	Reviewer(s)
61	Review of document purged (N)	When a review is purged	Reviewer(s)
62	Document has been submitted for training (N)	When a document is submitted for training	Document owner
63	Document training has been completed (N)	When the document is unlocked after all scheduled courses on which the document has been locked, are completed	Document owner

5.10.3 Messages generated by the Nonconformities module

	Message & Type	When Sent	Sent to	Supersedes
1	Nonconformity reported (N)	When a newly reported NCR is saved	Calculated list if rules are being used; else users added manually	
2	Please assess nonconformity (T)	When a newly reported NCR is saved	Assessment list for NCR if rules are switched on; else any user with access rights	
3	NCR has been accepted (N)	When the NCR is accepted	Reportee of NCR and users set up on rules	1
4	NCR has been rejected (N)	If the NCR is rejected at assessment stage.	Reportee of NCR and users set up on rules	1
		Also sent if one person on the Sign-off list rejects the NCR	NCR Sign-off list, NCR Owner	19
5	NCR has been deferred (N)	If an NCR is deferred at assessment stage	Reportee of NCR and users set up on rules	
6	Please assign actions for NCR (T)	When an NCR has been accepted.	Owner of NCR (person who has accepted it)	
		When an NCR has been re-assigned by anyone with access rights to the menu item	New NCR owner	
7	Process corrective action for NCR (T)	When a new action has been assigned by the NCR owner	Action assignee	
8	You are no longer responsible for corrective action on NCR (N)	When a corrective action has been re-assigned by the NCR owner	Original action assignee	6
9	You have been assigned as the owner of NCR (N)	When ownership of an NCR has been re-assigned	New NCR Owner	
10	You are no longer responsible for NCR (N)	When an NCR has been re-assigned by anyone with access rights to the menu item	Original NCR owner	
11	Nonconformity target date changed (N)	When 'Change Target Dates' dialog is used	NCR Owner	
12	Corrective action for nonconformity target date changed (N)	When 'Change Target Dates' dialog is used	Owner of NCR with CA	
13	CA for NCR rejected by (N)	If the assignee of an action rejects it	NCR assignee, NCR owner (not sent if NCR owner and action assignee are the same)	
14	CA rejected. Please reassign corrective action for NCR (T)	If the NCR assignee rejects the action	NCR owner	
15	CA for NCR accepted by (N)	When the assignee of an action accepts it	Original assignor, NCR owner (not sent if NCR owner & action assignee are same person)	
16	CA for NCR completed by (N)	When the owner of an action completes it	NCR owner (not sent if NCR owner and action assignee are the same person)	
17	Corrective Action for Nonconformity overdue (N)	When a corrective action with a target date becomes overdue	NCR Owner	
18	CA for NCR completed and requiring sign-off (T)	When a corrective action has been completed	Sign-off list for the action (if one exists); else users with menu access	

19	CA for NCR abandoned and requiring sign-off (T)	When an action has been rejected by the actionee and abandoned by the NCR owner	Sign-off list for the action (if one exists); else users with menu access	
20	CA for NCR sign-off declined by (N)	When at least one person on the action Sign-off list rejects it	Corrective Action owner	
21	CA for NCR signed off as abandoned (N)	When all on the action Sign-off list have signed the action off	Corrective Action owner	
22	CA for NCR signed off as accepted (N)	When all on the action Sign-off list have signed the action off	Corrective Action owner	
23	All CAs completed - NCR ready for final review (T)	When all the corrective actions have been signed off	NCR Owner	3
24	Please sign off NCR (T)	When final review has taken place	Sign-off list if rules are in use; else users with access	
25	NCR signed off as completed (N)	When all on the NCR Sign-off list have signed off the NCR	NCR owner and users on Notifications page of Sign-off list	
26	NCR sign-off rejected by <name> (N)	If one person on the Sign-off list rejects the NCR sign-off	NCR owner and users on Notifications page of Sign-off list	
27	Nonconformity severity level changed to (N)	When the NCR severity level is changed	If rules are in use and there is a rule defined that matches the new severity, then users on that rule	
28	Nonconformity severity cleared (N)	When an NCR severity level is cleared	NCR Owner	
29	Nonconformity overdue (N)	When an NCR with a target date becomes overdue	NCR Owner	
30	<Number> days have elapsed since reporting NCR and it is still outstanding (N)	When an NCR has not been completed in the required time set by the Nonconformity workflow setting 'Number of days after NCR reported before warning is sent to owner'	NCR Owner	

5.10.4 Messages generated by the Test & Calibration module

	Message & Type	**When Sent**	**Sent to**
1	Please run test assigned to equipment item (T)	When a single test is scheduled	Tester
2	Test <xx> due on equipment <xx> (N)	When a single test is scheduled	Owner
3	Please run test assigned to equipment item (T)	When a new tester is assigned or a test is moved to a new date	New Tester
4	Test <xx> due on equipment <xx> (N)	When a new tester is assigned or a test is moved to a new date	Owner
5	Test schedules assigned to equipment item (N)	When recurring tests are scheduled	Tester & Owner
6	Status of equipment item changed (N)	When the status is changed as a result of an unscheduled event or test result	Owner
7	Test assigned to multiple equipment items (N)	When recurring tests are scheduled	Tester & Owner

8	You have been assigned as tester for test <xx> (N)	When updating test details with changes made to the test template	Tester & Owner
9	You are no longer tester for test <xx> (N)	When updating test details with changes made to the test template	Superseded Tester
10	Tester has been changed (N)	As above	Owner

5.10.5 Messages generated by the Training module

	Message & Type	When Sent	Sent to	Supersedes
1	You have been booked on course (N)	On creation of a scheduled course or if added to an existing scheduled course	Attendees	
2	You are no longer required to attend course (N)	If an attendee is removed from the course attendance list	Attendee(s)	
3	You have been assigned as trainer for course (N)	On creation of a scheduled course or if appointed as trainer for an existing scheduled course	Internal trainer	
4	You are no longer trainer for course (N)	If an internal trainer is replaced with either an external supplier or another internal trainer	Internal trainer	
5	Course start date has changed (N)	If the start date of a scheduled course changes	Attendees and Internal trainer	
6	Please attend course (T)	A workflow setting controls the number of days in advance of the course start date that this task will be sent. If set to 0 the task will be sent on the day before. If set to 10, for example, the task will be sent 10 days before the start date.	Attendees	If the task has been sent and the course is deleted, the task will be marked as superseded.
7	Please run / complete course (T)	A workflow setting controls the number of days in advance of the course start date that this task will be sent. If set to 0 the task will be sent on the day before. If set to 10, for example, the task will be sent 10 days before the start date.	Internal trainer	If the task has been sent and the course is deleted, the task will be marked as superseded.

5.10.6 Message generated by Workbench

There is only one message generated by Workbench (as opposed to separate modules):-

	Message & Type	When Sent	Sent to
1	User locked out of database (N)	When a user is locked out of a database	Administrator

5.11 External mail systems

When you create a new user in Workbench, depending on their access rights and the modules installed, they will automatically be able to communicate electronically using the internal messaging system (see Tasks and Notifications).

In **Record | Personnel** (Personnel module) users may also be set up to communicate on an external mail system (if installed on your network).

If this is the case, and the System Wide workflow setting *Add notes to external messages* is also checked, the **Add notes to external message** dialog will allows users to add notes to any message sent externally. This dialog will appear automatically when sending messages to external mail from within Workbench. On opening external mail systems any message generated from within Workbench will then appear with other e-mail and can be opened by double-clicking on it.

NB. On invoking an external mail message, users must ensure that they do not exit their mail client at the same time.

IntraVista Professional

The Workbench Configuration Manager can be set up so that users with either SMTP or MAPI mailing systems may use IntraVista Professional to its full potential. This is all done seamlessly behind the scenes so that users may send and/or receive external mail messages when using IntraVista Professional. Double-click on any attachment sent via IVPro and Workbench will fire up, allowing you to proceed as 'normal'.

See also: Mail information Forwarding external mail Testing external mail

5.12 Calendar

The Calendar button is located on the main toolbar and gives access to a calendar that is used by all modules; this means that schedules and reminders generated by any installed module will be shown on the same calendar.

The calendar is open and closed by clicking on the calendar button. It is possible to open and operate menu items whilst the calendar remains open in the background. It ‘refreshes’ automatically as entries are added or edited - it is not necessary to close and re-open the Calendar to force this kind of update.

The calendar has its own pop-up menu revealed by right-clicking on any day.

One of the most useful features on the right-click menu is the **Advanced Filter** (see below) that allows you to filter information shown on the calendar by module, task status and/or actionee.

Access to the calendar is controlled by the system administrator in the **Set User Access Levels** dialog.

The Calendar toolbar

Click the central Month (eg. March) or Year (eg. 2013) buttons to select from their drop down menus. Click the forward or back arrows to browse one month or one year at a time.

The **Today** button takes you straight to today’s date. The **Week** button gives a week's date to view; the **Month** button a month to view.

The blank field at the far right side underneath the toolbar is the 'dock' for moving entries to previous or future months.

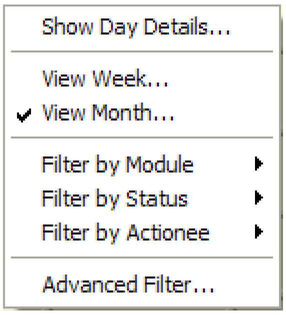
To view a whole day’s events, double-click on the appropriate day. (Days with nothing scheduled on them cannot be accessed in this way.)

All timed events appear on the calendar apart from ‘Equipment status change’ in the Test and Calibration module.

Options for viewing and filtering

All installed Workbench modules display schedules and reminders on the calendar interface, where relevant.

Right-clicking on any day presents a pop-up menu with several options for displaying the calendar and/or filtering its information...



The first three options give direct access to view the calendar in different formats.

The second three options will allow filtering of information shown on the calendar.

The final option, Advanced Filter, is described below.

Advanced Filter

Because the calendar can also show scheduled events from other installed Workbench modules, its right-click menu offers an Advanced Filter option that effectively lets you mask out unwanted details at any given time.

- Select the Modules you wish to include by ticking their check boxes.
- Select the status of the tasks to be included by clicking on the required radio button.
- Select the relevant staff, whose diary events you wish to see, by clicking on the required radio button. If the middle option is chosen (Filter List) the Staff Available list will then open allowing you to select staff. To do this, double-click on the name(s) in the left hand list (Available) to move them to the right hand side (Selected) - see Groups / Lists.

Click the **Apply** button to apply the advanced filter as set. Only selected events will now appear in your calendar.

5.12.1 Audits and the calendar

 All scheduled audits whether planned, running or completed are shown on the Calendar.

Planned audits are shown in black, running audits in red, and completed audits are grey. Icons are also used to show the differing status of the audits.....

 Planned  Running  Completed

Chosen audits can be accessed directly by double-clicking on them to call up the day's events and double-clicking on them again to access the audit details.

Audit task message shown on the Calendar

The *Please run audit task* message also appears on the calendar on the relevant date.

Re-scheduling audits

You can re-schedule an audit that is still in the Planned stage simply by highlighting the chosen audit and dragging it to the new date. This will update the planned start and end date fields within that audit. Audits that are Running or have been Completed cannot be moved.

If the re-scheduled date is in a different month, the 'dock' (next to the **Month** button) must be used.

1 Click on the audit to be moved and drag it to the dock. The audit name and original date will be displayed in the dock.

2 Go back or forward until the actual required Month and/or Year is showing and drag the audit in the dock to the re-scheduled date.

The re-scheduled date will be automatically updated in its main **Audit Details** dialog. Likewise, if an audit date is changed from within a dialog, its calendar position will be automatically amended.

5.12.2 Access to the calendar

Access to the calendar is controlled by the system administrator in the **Set User Access Levels** dialog (see Setting individual user access). The Calendar access entry appears at the bottom of the list of modules. It is preceded by a yellow key. Users are simply given ACCESS or NO ACCESS. To deny access to the calendar, highlight the entry and de-select the Granted Access check box. To grant access, reverse the process.

Two further access levels that may be set here are:-

(i) Message access to users reporting to you

(ii) Message access to all users

If a user is granted ACCESS to only (i), only messages and calendar entries of other users reporting directly to them will be accessible.

If a user is granted ACCESS to (ii) then they will have access to all other users' task and notification messages and calendar entries.

If ACCESS is denied to (i) and (ii) then the user will only have access to their own messages (and calendar entries).

Although users may be given access to view the calendar entries of other users, only the system administrator may action them.

5.12.3 Customer Care and the calendar

 The calendar shows all Customer Care tasks with a due date. These entries can't be dragged and dropped but will invoke the appropriate dialog from the day view. Once the action is

completed it is greyed out unless it is rejected. An alert is also sent by the Assign Corrective Action dialog whenever the date is changed to allow other machines to update their calendars to indicate the new status.

Customer Care task messages shown on the Calendar

The following task messages appear on the calendar on relevant dates, providing that a due date has been specified.

- Please assess complaint <number>
- Please process complaint <number>
- Please process complaint <number> action <number>
- Please sign off complaint <number>
- Please accept transfer request for complaint <number>
- Please accept transfer request for complaint <number> action <number>
- Please accept complaint <number> transferred / escalated to response band

5.12.4 Document Control and the calendar

 The following task messages, generated by the Document Control module, appear on the calendar on relevant dates.

- Document change request approved. Please edit document <number>
- Change request <number> approved. Please create new document
- Please withdraw document <number>
- Review <number> scheduled for document <number>
- Please action approved change request <number>. This last calendar entry applies only to tasks generated via Edit List, Distribution List and Document Attributes change requests.

See also: Reviews and the calendar.

5.12.4.1 Reviews and the calendar

Scheduled start dates for reviews are automatically entered on the Calendar in black type and with the icon shown below. When a review is completed the type becomes grey and a different icon is shown.

 Review start date  Review (or phase of review) completed

The following review message also appears on the calendar:-

- Review scheduled for document (responsible person)

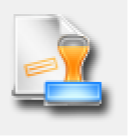
If a review has a close date these review messages will also appear:-

- Review of document scheduled (responsible person) - appears on review start date on calendar. When the start date is reached this entry is replaced by:-
- Please start review of document (responsible person) - appears on review start date on calendar, when start date is reached. When the review is started this is replaced by:-
- Please process review of document (responsible person) - appears on review close date on calendar - or, if unscheduled review:-
- Unscheduled review of document started. Please process (responsible person) - appears on review close date on calendar. Also:-
- Please respond to review/unscheduled review of document (reviewers) - appears on review close date on calendar.
- Review of document waiting start and close date reached - appears on the close date of a review if it is reached and the review has not been started.
- Review of document close date reached. Please close (responsible person) - appears when close date is reached.
- Review of document closed. Please complete (responsible person) - appears when the review is stopped or closed.
- All reviewers have completed review of document. Please close review (responsible person) - generated when all reviewers have finished their review.
- All reviewers have completed review of document. Please stop review (responsible person) - generated when all reviewers have finished their review before a close date.

Reviews can be accessed directly by user(s) with access rights and permissions; double-click to call up the day’s events and double-click again on the required review to access details.

Unlike audits, reviews cannot be rescheduled from the calendar.

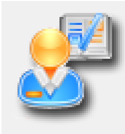
5.12.5 Nonconformities and the calendar



The calendar entry 'Process corrective action <number> for NCR <number>' appears for assigned and accepted corrective actions at their Target Completion Date. These entries can't be dragged and dropped but will invoke the appropriate Process Corrective Action dialog from the day view. When the action is completed the calendar entry is greyed out. If it is rejected, the calendar entry remains and the NCR may still be processed directly from the calendar.

If a Target Completion Date is added or changed on the **Assign Corrective Action** dialog, the calendar of relevant users is automatically updated. A further *Process corrective action* task message is sent to the assignee, superseding the first message and giving the revised completion date.

5.12.6 Training and the calendar

 There are two Training module Calendar entries:-

- When a new course is scheduled, an internal trainer will automatically have the entry 'Course <xx> has been scheduled' placed on their calendar at the same time that the notification 'You have been assigned as trainer for course <xx>' is sent.
- When a new course is scheduled, attendees will automatically have the entry 'Booked on course <xx>' placed on their calendar at the same time that the notification 'You have been booked on course <xx>' is sent.

5.12.7 Test & Calibration module and the calendar

 All scheduled tests, whether planned or completed, are shown on the calendar. Planned tests are shown in black type and completed tests are grey. Icons are also used to show the differing status of the tests...

 Planned

 Completed test with pass status

 Completed test with invalid status

 Completed test with fail status

Tests can be accessed directly by double-clicking on a day to call up that day's events and then double-clicking on the specific test to access the details.

The calendar can de displayed as a back drop as you continue to work and it 'refreshes' automatically as new events are added or, say, a test status changes. It is not necessary to close and re-open the calendar to force this kind of update.

Test and Calibration task message shown on the Calendar

When tests are set up using the following menu options, a task entry *Test <template name> on Equipment <equipment name>* will be created on the calendar for the nominated **Tester** on the Test **Template**:-

- **Assign Tests to an Equipment Item** - **New Schedule** and **Reschedule**
- **Assign Equipment Items to a Test** - **New Schedule** and **Reschedule**.

The tester will then be able to double-click on the calendar entry to invoke the **Enter Test Results** dialog where they may enter results for the test.

Re-scheduling test schedules

You can re-schedule a Planned test simply by highlighting and dragging it to the new date; Completed tests cannot be moved.

If the re-scheduled date is in a different month, the 'dock' (situated next to the **Close** button) must be used...

1 Click on the test to be moved and drag it to the dock.

2 The original date and test name will be displayed in the dock.

3 Go back or forward until the actual required Month and/or Year is showing and drag the test in the dock to the re-scheduled date.

The re-scheduled date will automatically be updated in the main **Test Details** dialog.

6 Personnel module

This module is installed as an integral part of all other modules. It is dedicated to maintaining a centralised database of all personnel, accessible to every other installed module. It is responsible for setting up and maintaining the history of all personnel including Workbench users.

It is highly recommended that you establish your personnel records before beginning to use other modules in the system as the records are referred to and used throughout Workbench.

6.1 Creating personnel records

The creation and updating of personnel records within Workbench is additionally used to define which members of personnel are also Workbench system users. The dialog revealed when selecting **Record | Personnel** is a dual dialog that extends whenever a **Login** is entered; you may then record a password and mailing options, (irrelevant for a non-user).

Because of the dual functionality of the dialog, it is possible to use the **Create Member of Personnel / Create User** routine to enter all personnel members and Workbench users in one operation. All that then remains is to determine the access levels for users (see **Setting user access levels**).

Personnel records are kept on a four page dialog. The **Details** page records all details; the **Workflow Settings** page allows users to change their individual workflow settings (where access to this page has been granted AND the system administrator has allowed the changing of default settings); the **Analysis** page allows the selection of user defined analysis categories applicable for the selected member of personnel; the **Personal History** page (only visible in **Edit** mode) tracks all changes made to personnel details and workflow settings (where applicable).

Creating a personnel record

1 From the **Record** menu in the **Personnel** module choose **Personnel**. The **Select Member of Personnel** dialog will appear.

2 Click the **New** button. The **Create Member of Personnel** dialog will appear. The **Details** page is used for recording personnel information; the **Workflow Settings** page (only enabled after a **Personnel ID** has been entered) shows the default workflow settings that currently exist for all users of this database. These are personal settings and may only be changed by each individual user for their own machine (**File | User Preferences | Workflow Settings** page) providing that the system administrator has granted access and rights to do so. The **Analysis** page allows the attachment of user-defined data for this member of personnel.

3 a) If the new personnel member **is not** to be set up as a Workbench user, simply complete the two mandatory fields (**<u>Personnel ID</u>**, which must be unique, and **<u>Surname</u>**), plus any other fields which are relevant. **Save**. (Notes on how to complete the fields are given below.)

b) If the personnel member **is** to be set up as a Workbench user, enter a unique **<u>Personnel ID</u>** and a **<u>Login</u>**. As soon as you enter a **Login** the dialog will extend with extra fields for recording a **Password** and **Mail Information**. Enter the **<u>Surname</u>** (this is mandatory) and then any other details about the personnel member as required (see notes below).

Passwords (if used) should be no longer than 12 characters. If you do enter a password for this member of personnel, re-type it in the field marked **Verify Password**; this must be an exact match to the first password. (**NB**. Unless the logged-in user is 'admin', the **Password** and **Verify Password** fields become redundant when Windows authentication is being used; these will therefore be removed for all users apart from 'admin'.)

Passwords are case sensitive and may also have to comply with other constraints set up by the system administrator. If this is the case, a warning will be given if the chosen password does not comply. (See Workbench configuration centre | Workflow settings | Password configuration - for further details on passwords.)

The Attachments button (next to the Login field) allows you to add, edit and/or delete files that are relevant to a specific personnel record.

Using the Search button, select a **Title** if required. Staff titles are originally set up in **Personnel | Settings** but you may add new titles 'on the fly' - see Titles. **NB**. If you wish to edit a title, this must be done from the **Settings** menu.

In the General information section, enter a **Department** name for the member of personnel or click on the Search button and select from those offered. Departments are set up in the System Manager module (see Departments).

The **Reports to** field allows you to record (using the Search button) who the new member of personnel will report to. The Search button offers a list of personnel already recorded in the system.

You may record the start date of the new personnel member by typing this in the appropriate field or using the Date button; the Date left may be recorded in the same way.

The **Notes** field is scrollable and will expand if required.

4 Enter appropriate Mail Information.

5 If visible, select the **Workflow Settings** page to view the personal workflow settings as configured by admin. in the **Workbench Configuration Centre**. With appropriate access rights, users may also edit these - see Personal workflow settings.

6 The **Analysis** page allows specific user defined analysis to be attached to the member of personnel - see Selecting user defined analysis for help with this if required. The analysis categories are set up in **Settings | Personnel UDA**.

You will need to log in again to register new details; future edits will take effect immediately after saving.

NB. Once a personnel record has been set up for a new member of staff, a fourth page appears on their record (Personal history); this tracks **all** changes made to their personal details.

See also: Editing personnel records

6.2 Mail information

The Mail Information options in the **Create User** dialog (**Record | Personnel**) allow you configure a user's external mail; this is in addition to the internal mail system (tasks and notifications).

Mail Type - the system defaults to Internal Messaging (ie. Tasks and Notifications) and users will always receive these messages. In addition, you may choose an external mail system (if supported) from the drop-down menu.

- If you select the Microsoft Mail option and the workflow setting - *Use Windows login profile for sending Microsoft mail messages* - is checked (the default) then the Login field will disappear and a red message will confirm that the user uses their Windows login profile, ie. the main Windows login used when logging onto their own personal workstation.
- If you select the Microsoft Mail option and the workflow setting - *Use Windows login profile for sending Microsoft mail messages* - is unchecked then the Login field will be renamed **Profile** and you will be required to enter a profile, ie. a different login to use specifically when sending Microsoft mail messages.

NB. The above workflow setting filters down to the individual user and so may be set up in the User Preferences dialog

- If you select the SMTP Mail option then you will be required to enter a Login.

The check box marked *User receives external mail* will be enabled for either external mail option; if checked, the user will be able to receive external mail messages as well as send them. If setting up for external mail, any **Login**, **Password** and/or **Address**, if required, should be entered exactly as used in your chosen external mail system.

Mail Options allow you to choose whether this user will be able to send mail with or without attachments (choose from the drop-down menu). Users 'with attachments' selected, will be able to attach actual ‘tasks’ to send to other users for them to double-click on and action; if 'without attachments' is selected, users may only really send ‘notifications’.

6.3 Editing personnel records

Editing personnel records can be done at any time by users with appropriate access rights. Amendments to all personnel details will be logged on the **Personal History** page of their record, giving the original detail and who it was changed by.

Amendments are normally made via the **Personnel** module, but users with appropriate access to the Training module (if installed) may also edit personnel records using the **Personnel | Details** routine.

1 Call up **Record | Personnel** in the **Personnel** module or **Personnel | Details** in the **Training** module.

2 Select the member of personnel whose record you wish to edit (see Search routines). If the *Hide 'admin' account from System and Personnel modules* workflow setting is checked, then the 'admin' account will be excluded from the Personnel list in both this dialog and the **Personnel | Details** routine in the Training module, unless you are logged in as 'admin'.

3 Amend any editable details on **Edit Member of Personnel | Edit User**. **NB**. Although a new personnel Title may be added 'on the fly' it cannot be edited that way. If you wish to edit a title you must do this from the Titles menu option in the **Settings** menu.

4 **Save**.

Users with appropriate access rights may also change their personal workflow settings on the **Workflow Settings** page - see Personal workflow settings.

All changes will automatically be logged on the Personal History page.

See also Creating Personnel records

6.4 Leavers

Personnel cannot be deleted from Workbench because their records may be needed for historical purposes. However they are flagged as having left as soon as a Date left is entered on their personnel record (see Creating personnel records). If this field is blank, the member of personnel is assumed to be a current employee.

Before a user can be marked as left, outstanding tasks have to be completed. The following task that does not have an 'On behalf of' option available to complete it, will prevent the user from being marked as left:-

- Customer Care complaints under-going sign-off.

If the 'On behalf of' element is not licensed, the following tasks will also prevent the user from being marked as left:-

- current document approvals
- change requests currently undergoing approval
- nonconformities undergoing sign-off.

NB. When marking a user as 'left', ALL occurrences of the user must either be replaced or removed. This involves locking many records so it is best done when the system is not being heavily used, to avoid getting the error message 'Another user is editing this record'.

Marking a user as having left

1. From the **Record** menu, choose **Personnel**.
2. Highlight the member of personnel who you want to mark as left and click **OK**.
3. In the **Edit User/ Edit Member of Personnel** dialog, enter their leaving date in the field marked Date left.
4. Click **Save**. The system will check to see if this user has any outstanding tasks and then...
    - if the selected user has tasks that cannot be reassigned you will be warned; the user cannot be marked as left until these tasks have been completed by them.
    - if the selected user has tasks that cannot be reassigned but that may be completed using the 'On behalf of' you have the option of continuing with the 'marking as left' routine. If you hit the **Yes** button to continue reassigning (or if there are no tasks that cannot be reassigned), the database is scanned for all occurrences of the user and the **Reassignment of Responsibility** dialog will appear. The field at the top of the dialog will display **Marking as left** together with the **Personnel ID** and full name of the person who is being marked as left. The group boxes below will list only those areas for which the user has responsibilities eg. if the user does not 'own' any documents, the **Document Owner** search button will be disabled.
      If all areas of responsibility in a group box are disabled, then the group box itself will not be visible. This shortens the list and shows exactly where and what responsibilities the selected user has.
5. The box immediately below the **Marking as left** field allows you to make a global replacement of all occurrences of this **Personnel ID** by checking the *Replace all responsibilities* with check box and entering a new Personnel ID in the Search field (using the Search button alongside). This option is only available if the 'Global Replacements' element is licensed; if it is not licensed, this check box will not be visible.
6. If you choose to do a Global Replacement, the Scroll box below is cleared. Vice-versa, if any information is entered into the Scroll box, details in the Global Replacement box are cleared.
7. The **OK** button is enabled if EITHER:-
    - the *Replace all responsibilities with* check box is checked and a valid staff member has been nominated OR
    - all enabled areas of responsibility have either a new staff member in the replacement search, a *Remove* check box is checked or a *By document* / *By audit* check box is checked.

Once the **OK** button has been clicked, a control panel will show the progress of reassignment.

Depending on how the Task and Notification pages are set up in the **Workbench Configuration Centre**, relevant messages will be sent to the new and/or replaced users informing them of the changed circumstances. Appropriate entries will be made to the document's History page when actions have been carried out as a result of a user being marked as left.

6.5 Titles

The **Settings | Titles** menu option in the Personnel module allows you to record any kind of personnel title (rather than just Dr. Mr. Mrs. Miss. etc.). The dialog initially displays a search grid containing all existing titles - choose to either edit one of these or to create a new one.

Creating / editing a title

1. From the **Settings** menu in the **Personnel** module, choose **Titles**.
2. In the **Select Staff Title** dialog double-click on an existing title to edit (see Search routines if you need help with this) or click the **New** button to create a new title.
3. If you click the **New** button, the **Create Staff Title** dialog will appear.
4. Type in a mandatory **Description** of the new title and **Save**.

NB. In **Edit** mode, the **Undo** button undoes changes that have not been saved. The **Delete** button will remove a **Staff Title** if it has not been used in any record anywhere on the system.

6.6 Personnel UDA

The ability for you to determine your own analysis categories and their associated values is present throughout Workbench and is a very powerful customisation feature. User definable analysis set-up is always found in the **Settings** menu and wherever a module offers more than one type of analysis category this is offered from a walk-right menu. Different categories must each be set up separately, but this is done in exactly the same way; the various categories then become available for selection in appropriate **Analysis** dialogs.

See User-definable analysis categories

6.7 Personnel reports

The Personnel module supports a number of standard reports concerning personnel records. Each dialog offers Report Options allowing you to group and order the subsequent records.

The selection criteria in all personnel reports are the same and you may choose which and how many of these you wish to include. Obviously the more specific you are in the areas you include in the search, the fewer number of records are likely to match up.

Each of the five reports is likely to be used to extract different information; a guide to the general purpose of each report is given but the flexibility of the system is such that you may use the information in many different ways.

The information used for compiling reports is taken from the records stored in **Record | Personnel** . When personnel leave the company their records are not deleted and anyone who has a leaving date entered in their records will still, by default, be included in a personnel report search. If you wish to include only the records of current employees or to search only amongst personnel who have left, use the **Personnel Status** field on the relevant Personnel Details page of the chosen report; choose the appropriate option from its drop-down menu.

Reports will only be issued when information matches all the criteria selected; all reports can be directed to the screen, to a printer or to file.

6.7.1 Personnel report options

Report options shown at the bottom of personnel report dialogs allow you to organise records in a variety of ways so that the information given can be as focused and as useful as possible. Options vary slightly with each report, to reflect the information offered.

Group 1 is used to group records shown in the report under a selected heading - for example, in the **Personnel Summary** report you may choose from Department, Reports To or Date Started in the drop-down menu (other Report Options may differ). Once a group heading has been selected, then the drop-down menu for Group 2 becomes available. The same headings are offered here apart from the one that has been chosen for Group 1.

Group 2 (when available) is used to sub-divide Group 1, ie. if the list of records shown in the subsequent report in Group 1 is very long then this list may be sub-grouped within the larger group according to the heading chosen for Group 2.

Group 3 provides an opportunity to group Group 2 lists even further. The drop-down menu will be enabled once the other two groups are chosen; only group headings not used in Groups 1 and 2 will remain for selection.

Show Mail Forwarding? (if present) - if you tick this option, the report will show which users have mail forwarding and to whom their mail is forwarded.

Order by allows you to order the information to be shown in the report by Personnel ID, Surname, Login, Mail Login, Mail Address, Date Started, Date Left etc. (Order by options for different reports vary). Select one from the drop-down menu.

Destination allows you to choose where you wish the subsequent report to be directed to - screen (for viewing and also giving the option to print), printer or saved to file. Select one from the drop-down menu. See Viewing, printing or saving reports.

Print Attachment information? - if you tick this option, details of any file(s) attached to the selected personnel record(s) will be shown.

New Page on Group Break? - if you tick this option, a new page will be started for each different group shown in the report.

Print Date/time produced? - if this option is ticked, the date and time of the report will be shown on the report itself.

6.7.2 Summary report

This report gives a summary of all personnel - their Personnel ID, Title, Name and Department. Its dialog offers the same selection criteria as all other personnel reports; each field is explained here.

Setting up a Personnel Summary report

1 From the **Reports** menu in the **Personnel** module choose **Summary**.

None of the selection criteria in the **Personnel Summary Report** dialog is mandatory. If you simply click **OK**, the report will use its default settings and produce a report giving a list of all personnel ordered alphabetically.

For a more specific search, use any of the searches and filters as detailed below.

Use the **Clear** button to clear the dialog of currently selected personnel information and start again. Use Search buttons and drop-down menus to select specific criteria to search on.

If using the **Job Title Contains** field, type in any word(s) contained within the job title.

In the **Reports to** field, use the Search button to select the member of staff that selected personnel report to.

Enter a specific date range (using Date buttons if preferred).

The **Personnel Status** field allows you to show ‘all personnel’, ‘current personnel only’ or ‘personnel who have left the company’ (choose from the drop-down menu).

Select a **Department**(s) you wish to filter on. Hold down the **Shift** button to highlight consecutive items in a list; use the **Ctrl** button to select non-consecutive items. By default, ‘hidden’ departments (see Departments) will not be shown. To make them available for selection, tick the check box marked *Show hidden Departments*.

Mail Details Tick the check box marked *User Receives Mail* if you wish to include in your report only users who receive mail.

Filter, (if appropriate and by selecting from the **Mail Type** drop-down menu), the type of mail that selected personnel receive.

Filter, (if appropriate and by selecting from the **Mail Options** drop-down menu), whether selected personnel can send mail with attachments or not.

2 Select relevant Report Options.

3 When relevant selection criteria have been selected and Report Options set up, click **OK** to run the report.

See also Viewing, printing or saving reports.

6.7.3 Dates report

This report gives an alphabetic list of all selected personnel - their Personnel ID, Surname, Forename, Date Started and Left. It functions exactly as the **Personnel Summary** Report (see Summary report).

None of the selection criteria are mandatory. If you simply click **OK**, the default settings will be used to produce a report listing the starting date (and leaving if relevant) of all personnel.

NB. The only grouping you may choose (under Group 1) is by Department, but you may choose to order the list by Personnel ID, Surname, Date Started or Date Left.

See also Report options and Viewing, printing or saving reports

6.7.4 Organisation report

This report gives an alphabetic list of all selected personnel - their Personnel ID, Surname, Forename, Job Title, Department and who they report to.

The report dialog functions exactly as the one for **Personnel Summary** reports (see Summary report). None of the selection criteria are mandatory. If you simply click **OK** the default settings will be used to produce a report listing all personnel showing their job title, department and who they report to.

Using filters as discussed in **Reports | Summary** the report could, for example, show very quickly which members of staff reported to another specified member or how many members of staff were in a particular department.

You may choose to group selected personnel (under Group 1) by Department or Reports To; Group 2 will allow you to sub-group by the heading not chosen for Group 1. Obviously Group 3 will not be an option.

Personnel Organisation reports may be ordered by Personnel ID or Surname.

6.7.5 Details report

This report gives full details (apart from any Password) of all selected personnel as registered in **Record | Personnel**, including Name, Title, Job Title, who they report to, their starting (and leaving) date and full mail information.

The dialog functions as the one for **Personnel Summary** reports (see Summary report). None of the selection criteria are mandatory. If you simply click **OK**, default settings will be used to produce a report listing all personnel and their details.

You may choose to group selected personnel (under Group 1) by Department, Reports To, Mail Type, User Receives Mail or Mail Options; Group 2 and Group 3 will allow you to sub-group by any of these headings apart from those already selected.

Personnel Details reports may be ordered by Personnel ID, Surname, Date Started, Date Left, Login, Mail Login or Mail Address.

See also Report Options and Viewing, printing or saving reports

6.7.6 Mail details report

This report gives full mail details of all selected personnel including their full name and all mail details exactly as recorded in **Record | Personnel**. The dialog functions as the one for Personnel Summary reports. None of the selection criteria are mandatory. If you simply click **OK**, the default settings will be used to produce a report listing all personnel and their mail details.

There is however an extra Report Options check box *Show Mail forwarding?* If checked, an entry will be added to the actual report showing to whom mail has been forwarded. Bear in mind that if mail is forwarded on to one person who in turn forwards to another, the person shown on the report will be the 'end point'.

You may group selected personnel (under Group 1) by Mail Type, User Receives Mail or Mail Options; Group 2 and Group 3 will allow you to sub-group by the same headings apart from those already selected.

Mail Details reports may be ordered by Personnel ID, Surname, Login, Mail Login or Mail Address.

6.7.7 Viewing, printing or saving reports

An Information message will appear when no records can be found which meet the search criteria that you have set up. If you still wish to find records that may match your criteria closely, go back to the selection criteria window and broaden your original selection.

When there are records that match your search and depending on which report destination you chose, ie. Screen (print preview), Printer or File, either the **Print Preview** or the **Print** dialog will appear.

Screen (print preview)

The **Print Preview** dialog will appear when you select the Screen (print preview) destination option for a report (or in any other dialog). If you hold the pointer tool at the bottom of the toolbar, yellow pop-up bars will appear, explaining the feature of each button.

The Print icon allows you to print any material shown in the print preview.

By clicking on the middle of the three magnification buttons, the page will be shown full width.

By clicking on the right of the three magnification buttons, the page will be shown at actual size.

The left magnification button shows the whole page.

The outside arrows take you back to the first page or on to the last.

The single arrows allow you to turn the pages of a report backward or forward.

The number of the current page is shown in the centre.

If, in Report Options, you ticked *Print Date/time produced?* this information will appear on the report itself.

After previewing, use the **Close** button to close the record or print it by clicking on the small printer icon in the top left hand corner. If you elect to print, the **Print** dialog will appear.

Printer

If you selected the **Printer** destination on Report Options or clicked on the print icon in Print Preview, the **Print** dialog will appear. It may differ according to the type of printer you have installed and in some cases you will not have the option to *Print to File*.

1 Configure the printer if necessary.

2 Select the number of copies required and the Page Range.

3 Click **OK** to print the report.

In most instances you may still print to file from this dialog; to do this, click in the *Print to file* check box and then select the type and destination of the file (see **File**, below).

Each report will differ slightly according to the type and information shown but all will follow a similar format. All printed reports are A4 and have a wide left hand edge margin for binding.

File

If you chose the **File** destination option in Report Options the **Print** dialog will appear with the *Print to file* check box in the bottom part of the dialog already checked.

1 Tick the *Print to file* check box if it is not ticked.

2 Select the **Type** of file required from the drop-down list; this list may differ depending on the computer / network system you have installed.

3 Enter **Where** to save the file or select its destination using the **…** button.

4 Click **OK** to save to file in the selected destination (from where it may be e-mailed in the selected format if required).

6.8 Menus at a glance

This page explains briefly, the purpose and scope of each menu item in the Personnel module.

File

Where Am I? Allows you to verify the currently selected database. This is also displayed at the lower right side of the Workbench main window.

Who Am I? Shows your current Login and whether access rights are granted individually or via templates.

Login to Database... Here you may switch to another database without having to exit the system and re-enter. You will, however, still have to log in to the new database as users may have different access rights between databases. If you are already logged in to the system and wish to change who you are logged in as yet remain connected to the same database, do so here.

User Preferences... If viewed in its entirety, this is a four-page dialog allowing you to set up various preferences covering the look and workings of your own machine. Here you may also change your own password and decide which other user(s) should be allowed to process tasks on your behalf, in case of absence. However, access to this menu item and to each individual page is controlled by the system administrator so the whole menu item or aspects of it may not be present.

View Issued Document... Allows you to view issued documents to which you have access (appears only when the Document Control module is also installed).

Quick document links Providing that the Document Control module is installed, the *Use document quick launch facility* workflow setting is set in the **Workbench Configuration Centre |** Workflow Settings (New User/Personal) and the *Number of links to most recently viewed documents* setting is set between 1 and 10, then the last viewed documents (up to a maximum of 10 and dependent on the *Number of links...* setting) will also be available for viewing here. They will be listed most recent first.

Workstation Settings... Allows the setting up of a default database and login that are automatically selected on future start-up. The default dictionary is also set here. Finally you may select which Workbench server to connect to and, optionally, whether the list of servers displayed should be restricted to only those that are running.

Exit Exit the program. A confirmation message is displayed first.

Record

Personnel... Allows the creation, viewing and modification of personnel and user information.

Settings

Titles... Allows the creation and modification of staff titles.

Personnel UDA Allows the creation of user-definable analysis categories for staff members.

Reports

Summary... Shows a summary of personnel.

Dates... Shows starting and leaving dates for selected personnel.

Organisation... Shows details of organisational structure.

Details... Shows detailed information on all selected personnel.

Mail Details... Shows details of personnel mail settings.

Module

In this menu you may gain quick access to any other installed Workbench modules.

Audits You will only be able to use this menu item if you have the Audits module installed. If so, please refer to the Audits Help system for full details on its purpose and function.

Customer Care You will only be able to use this menu item if you have the Customer Care module installed. If so, please refer to the Customer Care Help system for full details on its purpose and function.

Document Control You will only be able to use this menu item if you have the Document Control module installed. If so, please refer to the Document Control Help system for full details on its purpose and function.

Nonconformities You will only be able to use this menu item if you have the Nonconformities module installed. If so, please refer to the Nonconformities Help system for full details on its purpose and function.

Personnel This module is installed as an integral part of all modules and facilitates all aspects of personnel administration on the system.

ReportQuest You will only be able to use this menu item if you have ReportQuest installed. If so, please refer to the ReportQuest Help system for full details on its purpose and function.

System Manager This module is installed as an integral part of all modules. It allows the system administrator to define and maintain all global system settings, manage individual user access to Workbench and to arrange user logins and passwords.

Test and Calibration You will only be able to use this menu item if you have the Test & Calibration module installed. If so, please refer to the Test and Calibration Help system for full details on its purpose and function.

Training You will only be able to use this menu item if you have the Training module installed. If so, please refer to the Training Help system for full details on its purpose and function.

Help

Contents Gives access to the Table of Contents for on-line Help.

Topic Search Gives an alphabetic index of all Help entries and allows searches for specific topics.

How to Use Help Explains how to use the Help system effectively.

About Workbench Shows the version of Workbench and the number / usage of licences.

7 System Manager module

This module is installed as an integral part of all other modules. It is a vital area of Workbench as it handles much of the system's security by granting or revoking access to menu items for individual users or groups of users (Access Templates). After granting access at menu level you may have a further option to determine what rights the user has in a given dialog (eg. read-only, ability to add new records etc.). Overall this gives you extremely tight control over which users can access which part(s) of the system. The dialog used to control access is designed to make this administration task as easy as possible.

An additional benefit of such tight control is the sheer convenience it offers. Presenting users with precisely the menu options they need to do their work is much clearer and less confusing for them than being faced with a whole list of irrelevant (for them) menu options.

The **Workbench Configuration Centre** is also housed within the System Manager module and presents all Workbench globally configurable options in a single dialog. This means that the administrator can locate the required function quickly and will soon become aware of all elements that are configurable.

The Configuration menu also controls the maintenance of user passwords, the organisation of departments and personnel groups, the prioritising of tasks and the menu option allowing the reassigning of responsibilities, especially useful when a user is leaving the company. Locked out users are also restored here.

NB. Wherever reference is made (in Help topics) to the 'system administrator' this includes any user who also has access to the relevant options in the System Manager module. Because the configuration options are so many, we strongly advise that access to the System Manager module is very strictly controlled.

7.1 Access and administration

Users can be granted or denied access rights in Workbench either as individuals or as members of a group whose permitted options are controlled by an access template. The latter is a very convenient way of setting access rights 'en masse' when a work group logically shares the same set of requirements and privileges. Users joining an access template inherit that template's access settings by default.

Where a user has individual access and is also a member of an access template, the individual rights take preference. Note that access levels for individuals or members of templates are specific to the database for which they were set up. This means it is possible to have individuals with radically different settings between databases.

The system administrator controls access to all module menu items that can be switched on or off for any given user or template quite independently of settings for any other module. In this way a user might enjoy comparatively high levels of access in, say, the Document Control module while having no access whatsoever to another module which is either irrelevant to their work or ruled out on security grounds.

If a user does not have access to a specific menu item but is actually on an Access list to perform a certain task, then that user will still get the appropriate task message but can only access the task via their Tasks bar.

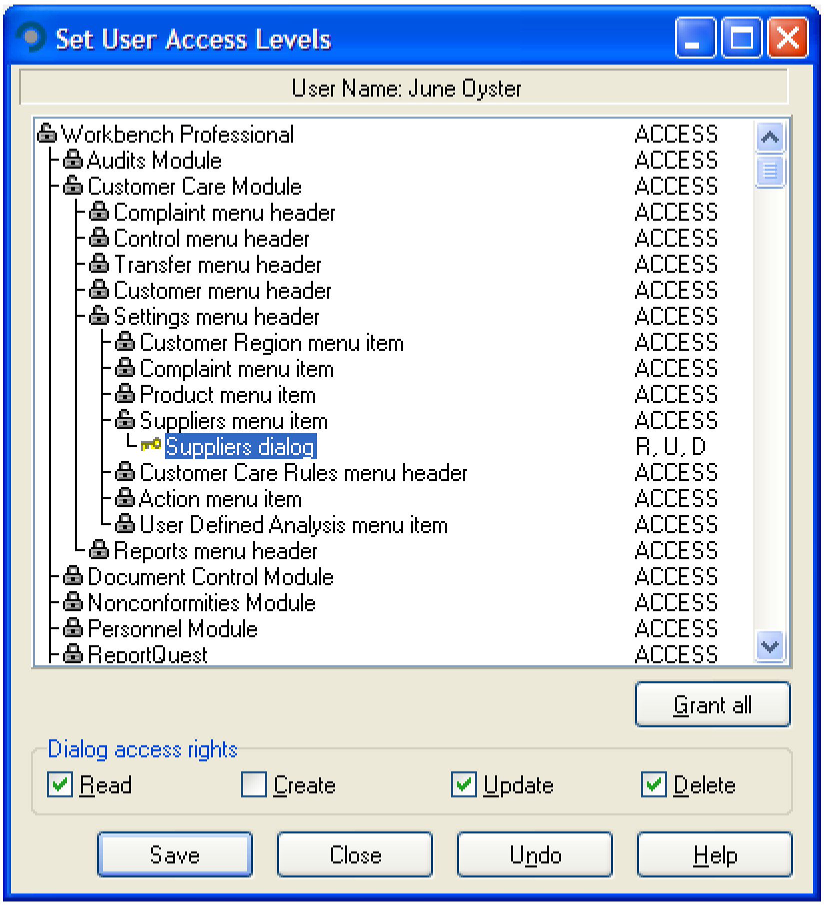
7.1.1 Setting system access levels

Workbench provides a very detailed but simple method of setting access levels to modules, menus and dialogs. After selecting an individual user (see Setting user access levels) or an access template (see Creating access templates) the **Set User Access Levels** dialog will be displayed.

This allows you to set the access levels for an individual or template from complete denial to complete access and can be fine-tuned to the point of allowing access to a particular dialog (where appropriate) but controlling access within it. Dialog access rights are as follows:

- **Read** - allows you to read the information on screen.
- **Create** - allows you to create / add a new record.
- **Update** - allows you to update / edit an existing record.
- **Delete** - allows you to delete an existing record.

When a dialog option exists and is highlighted (eg. **Suppliers** in several different modules) the *Read*, *Create*, *Update* and *Delete* check boxes will be displayed at the bottom of the dialog.



You may then check or uncheck the boxes to grant/deny access to each function as required. The different functions are shown on the Access list as R, C, U and D; if one of these letters is missing, it means that access has been denied for that particular function, for example the **Create** function shown in the example above.

NB. If the same dialog is used by more than one module (as the example above) and access is denied for any function in any module, then it will also be denied for all modules using the same dialog.

You may grant any combination of these rights to any given user. For example, a combination of Read / Update will allow that user to read and edit any existing records but not allow either the addition of new records or the deletion of any existing ones. A granting of Create access only will allow the user to add new records but disallow even the reading of existing ones.

NB. Some combinations may be illogical - granting Update rights without Read rights, for instance.

See also Setting individual user access and Creating access templates

7.1.2 Setting user access levels

The **Set User Access Levels** dialog allows you to select an individual user and set appropriate access levels to all Workbench modules, menus and dialogs. The **Set Template Access Levels** dialog works in exactly the same way but sets the same access levels for all users within an access template - see Creating access templates.

An option near the bottom of the list controls permissions governing 'Doclists' in Workbench's web viewer, IntraVista Professional (see DocLists).

Creating / editing access levels

1 From the **Access** menu in the System Manager module, choose **Set User**.

2 In the **Select User** selection dialog, select the required user (see Search routines for help with this if necessary). The **Set User Access Levels** dialog for the selected user will appear.

3 Double-click on the lock icon or on the top entry to expand the list and gain access to lower levels of the menu hierarchy. The *Granted Access* check box allows you to tailor access down to individual dialog level (where applicable). Options with a yellow key symbol cannot be expanded any further.

   NB. The default access level setting in Workbench for a new user is NO ACCESS.

   Click the check box marked *Granted Access* to grant access to a highlighted option. Click the **Grant all** button to allow access to all ‘child’ options of a highlighted ‘parent’ option.

4 Start by highlighting Workbench Professional (or Quality Workbench) at the top of the dialog and clicking the *Granted Access* check box at bottom left.

5 Then go through each module / menu / dialog where appropriate and set up the required access rights. Dialog permissions can usually be fine-tuned down to **Read**, **Create**, **Update** and **Delete** access levels (see Setting system access levels).

6 **Save** and you will be taken back to the **Select User** dialog. (Revised access levels will be saved at this point).

A highlighted option has been granted access if the *Granted Access* check box is checked (ticked); to deny access to individual options, de-select the check box. The right hand column shows very clearly whether ACCESS or NO ACCESS has been granted to each menu option.

In order for access to be granted to individual options, the ‘parent’ option (with the lock symbol) must have the Granted *Access* check box ticked. If *Granted Access* is off at parent level, a note on the dialog will inform you that access permission is denied and at what level it is denied.

If an individual user (or access template) is denied access to a menu item, then that menu item will not be visible to the user(s) when working within Workbench.

See also: Access to Tasks and Notifications Calendar access Access to the Training module Access to ReportQuest

7.1.3 Creating access templates

Access templates are extremely useful where a group of users needs the same access rights to Workbench. Anyone joining that group is also assigned the same access rights by default. For example:-

- Red Level might be an Access Template with a high level of access to Workbench
- Green Level for intermediate access
- Blue Level for low level access.

In this example, a user attached to the Red Level Access Template may well see all the Workbench menu options, whilst a user attached to the Blue Level Access Template would see a limited set of menu options when they logged in to Workbench.

So, rather than allocating access levels to individual users, the above eg. would work as follows:-

i) an **Access template** for each level is created within a Workbench database and controls access to that database.

ii) access rights are allocated to the **Access template**.

iii) users are attached to the **Access template**.

This is only one way in which access templates might be used. It is well worth exploring opportunities in your own organisation - a great deal of time and system administration can be saved in this way.

Creating an access template

The **Access | Templates** option allows you to create and maintain access templates and to select or de-select users attached to specific templates

1. From the **Access** menu in the System Manager module, choose **Templates**; the **Select Access Templates** dialog will appear.
2. Click on **New**. The **Create Access Template** dialog will appear, allowing you to create a new template and attach selected users to it.
3. Enter an easily identifiable **ID** for this Access template and a **Name** (mandatory fields).
4. If you want to base the template on an existing one, use the Search button alongside the *Base On* field to search for the relevant template by ID or by Name. Only the actual Access levels (**Set Access Template Levels**) will be copied over. The users who will have access to the new template are selected in the 'normal' way.
5. Enter any **Notes** describing the template or its use.
6. Select users to attach to this template (see Groups / Lists). A list of users available to be attached to a template is given in the Users Available list. Only users who currently have no access rights whatsoever to Workbench will be available for inclusion in an access template ie. users have EITHER individual access to Workbench OR access via a template. The Users with Template Access list shows users who currently have access to this template (if any).

   NB. A user can only be assigned to one Access Template. Once assigned that user will be excluded from the Users Available list for new templates.
7. When the two mandatory fields are completed you will be able to click on the **Access** button which gives direct access to the **Set Template Access Levels** dialog; this dialog functions in exactly the same way as the **Set User Access Levels** dialog (see Setting user access levels).

Right clicking over a template anywhere in Workbench will show a pop-up list of the personnel in that template.

7.1.4 Editing access templates

Fundamentally, an access template can be changed in two ways:-

- the access levels of templates can be altered
- personnel can be added to or removed from templates.

As a user can only be assigned to one **Access Template**, once assigned, that user will be excluded from the Users Available list for new templates. Removing members of personnel from templates will put them back in the 'pool' of available users.

Editing template access levels

1. From the **Access** menu in the System Manager module, choose **Templates**.
2. In **Select Access Template**, highlight the required access template and click **OK**.
3. In the **Edit Access Template** dialog, click the **Access** button. Any previously saved access settings for that template will be displayed.
4. Complete the required edit changes.
5. Click **Save** to save the revised access levels.

NB. If the **Grant all** button is selected for a module or for an option, all the 'child' options of that module/option will be removed or granted.

7.1.5 Access settings

Access to Workbench is discussed in detail in the section covering the System Manager module - see Access and administration. However there are a few 'extra' access rights and permissions used in conjunction with specific modules and routines, and outlined in the following topics.

7.1.5.1 Calendar access

Access to the calendar is controlled by the system administrator in the **Set User Access Levels** dialog (see Setting individual user access). The Calendar access entry appears at the bottom of the list of modules. It is preceded by a yellow key. Users are simply given ACCESS or NO ACCESS. To deny access to the calendar, highlight the entry and de-select the Granted Access check box. To grant access, reverse the process.

Two further access levels that may be set here are:-

(i) Message access to users reporting to you

(ii) Message access to all users

If a user is granted ACCESS to only (i), only messages and calendar entries of other users reporting directly to them will be accessible.

If a user is granted ACCESS to (ii) then they will have access to all other users' task and notification messages and calendar entries.

If ACCESS is denied to (i) and (ii) then the user will only have access to their own messages (and calendar entries).

Although users may be given access to view the calendar entries of other users, only the system administrator may action them.

7.1.5.2 Access to Tasks and Notifications

There are three levels of access to task and notification messages (and calendar entries) that are controlled by the system administrator in the **Set User Access Levels** dialog (see Setting individual user access).

(i) Message access to users reporting to you

(ii) Message access to all users

If a user is granted ACCESS to only (i), only messages of other users reporting directly to them will be accessible.

If a user is granted ACCESS to (ii) they will have access to all other users' tasks and notifications.

If ACCESS is denied to (i) and (ii) then the user will only have access to their own messages.

Regardless of the access, users apart from the system administrator may only view another user's tasks or notifications; therefore other users cannot:-

- open a task or notification
- change the priority of a task
- delete a task or notification.

NB. The same level of access granted for tasks and notification messages will also apply to entries on the Calendar.

Deleting other users' notifications

The third access option *Delete access to all user notifications*, (**Access | Set User** / **Templates**), allows the administrator to control whether a user may or may not delete other users' notifications. If access is granted to this option, open the **User** menu on the Notifications dialog and select the user(s) whose notifications you wish to delete. Then select the bottom option from the right-click menu, *Remove all displayed users notifications* to remove the required notifications.

NB. If you do not wish to remove your own notifications, make sure you have de-selected yourself in the **Select User** dialog.

7.1.5.3 Access to the Training module

Access to the Training module can be controlled more specifically to allow access to:-

- your own records only
- users reporting to you
- all users records.

These further levels of access are controlled by admin. and found under the Training module access levels in **Set User Access Levels** (see Setting individual user access). They are:-

(i) access to users reporting to you

(ii) access to all users

If a user is granted ACCESS to only (i), then they will only be able to view training records of other users reporting directly to them.

If a user is granted ACCESS to (ii) then they will have access to all other users' training records.

If ACCESS is denied to both (i) and (ii) then the user will only have access to their own records.

7.1.5.4 IntraVista Professional DocLists

The 'Create Shared DocLists' option in the **Set User Access Levels** dialog is used in conjunction with Workbench's web viewer, IntraVista Professional. The Document Control interface provides the user with the ability to create DocLists - used purely for the organisation of documents, for grouping them with other documents of similar content/type.

Workbench 2008 onwards also offers the option to use DocLists. These mimic the DocLists that have been available in IVPro for some time and are available per database, per user. Providing that you have access to the **Personal Workflow Settings** page of the **User Preferences** menu option, the decision to use/not to use DocLists can be toggled on and off as you wish.

A DocList will be one of four different types:-

1. **Library** - a DocList containing the full list of documents available to the current user. A document may appear in more than one list.
2. **Personal** - a DocList that only its owner can see. No permissions can be given for anyone else to view the list, or add/remove documents to/from the list.
3. **Shared** - a DocList that more than one user can view. Only the owner or admin may delete the list on a permanent basis. Other users (depending on permissions) may add or remove documents to this list, and may also hide the list from their Document Control interface view. Access rights in Workbench are needed for a user to create a Shared DocList. A tool tip on Shared DocLists will show the owner - this is useful if users who are able to see a DocList wish to contact the owner in order for the owner to be able to create extra permissions for the user.
4. **Global** - a DocList that all users are forced to view. Whilst in a Global status a DocList may not have documents added/removed, and no user can delete the list from their Document Control interface view. A Global DocList must be demoted to a shared list in order for any changes to be made to the list. Access rights in Workbench are needed for a user to promote a Shared DocList to a Global DocList. An owner of a DocList will be able to add documents, remove documents, rename and delete it. A tool tip on Global DocLists will show the owner - this is useful if users who are able to see a DocList wish to contact the owner in order for the owner to be able to create extra permissions for the user.

Double-click on the 'Create Shared DocLists' option in the **Set User Access Levels** dialog to reveal the 'Create Global DocLists' option. Access to these two options may be set separately exactly as setting access to all other menu items (see Setting system access levels).

7.1.5.5 Access reports

There are three reports that cover all personnel and template access rights and can show which personnel are in which templates. These are:-

Access by Personnel   Access by Template   Show users in Template

7.1.5.6 Access to ReportQuest

Security for ReportQuest must obey the following rules:-

1. If a user does not have access to a document in the Document Control module, they must not be able to see its contents included in either a query or report output.
2. If a report is run from within a module then it may be run only, no modifications to the design should be allowed. (**NB**. Accessing ReportQuest from any module will display the same opening screen as accessing it directly from ReportQuest, ie. all created reports will be available for selection.)

3 When a directory is created, it is owned by the person who created it; it will then assume the same security as its parent directory. The first directory created will be owned by the administrator. If the security of a new sub directory requires amending, select **Access** from the folder's right-click menu - this can only be done by admin. or the owner.

Access will default to that of its parent but can be amended at individual or template level. Once access is granted at that level it can be further granted as **Create**, **Update** or **Delete** for each user or template.

4 The administrator always assumes the same rights as the directory owner.

Further security aspects

- If a user does not have access to a document in the Document Control module, they cannot view it or its contents in either a query or a report output.
- If a report is run from within another Workbench module then it may be run only, no modifications to the design are allowed.
- Access is further restricted within Workbench where you may remove access to certain advanced functions within the **Query Designer**. This higher level of security/access hangs off an area for ReportQuest located in the System Manager module (see Setting user access levels) and specifically controls access to the Code workspace, Edit Field Attributes dialog and Edit SQL.
- The system administrator may also set specific Folder Access but this is done from within ReportQuest. For full details see the ReportQuest Help

It is important that the system administrator controls access here very tightly to prevent unauthorised personnel from viewing the contents of a query or report where this may be contrary to company policy.

NB. Deleted reports are sent to the Recycle bin. Remember to empty this if you are deleting reports of a sensitive nature.

7.2 Configuration options

The **Configuration** menu in the System Manager module houses the main **Workbench Configuration Centre** - a dialog designed specifically for use by the database administrator. Within this dialog, global system settings can be defined and maintained by the administrator. A separate section Workbench Configuration Centre details all the options here.

The Configuration menu also allow the administrator to maintain other aspects of the system such as user logins, departments and personnel groups, priority levels - and to set up 'global' replacement of one user with another throughout the system (for example, when a member of staff leaves the company).

7.2.1 User logins

Configuration | User Logins has a walk-right menu offering four options:- Testing external mail

Changing a user's password   Restoring a locked out user   Assigning delegates

An associated report (**Reports | Locked Out History**) shows the history of all locked out users and dates of lockout, see Locked out history report.

7.2.1.1 Testing external mail

This routine is used purely to check external mail connectivity; you can only use this if you are set up to send and receive external mail.

1 From the **Configuration** menu in the System Manager module choose **User Logins** and then **Test External Mail** from the walk-right menu; the **Select User** dialog will appear, showing only users who are also set up to send and receive external mail.

2 In the **Select User** dialog, select a user to send the test message to (see Search routines).

A test message (with attachment if configured in this way) will then be sent to the selected user and the test message will appear in the receiving user's external mail box. In normal use, when the receiving user double-clicks on an attachment, they will be taken straight in to the Workbench dialog that they are being asked to process (Task) or read (Notification).

7.2.1.2 Creating a new password for an existing user

The **Change Users Password** dialog allows the system administrator (or any user with appropriate access) to set up a new password for any existing Workbench user. Because Workbench converts all passwords into code, setting up a new one using this menu item is the only solution if a user has forgotten their password.

This menu item will not be present where the selected database is using Windows NT Logons for authentication. (In this case, 'admin' will be the only user using Workbench authentication and therefore the Change Users Password option is redundant.)

The System Wide workflow setting *Hide 'admin' account from System and Personnel modules,* if checked, will prevent users with access to the **Change Users Password** dialog from changing the 'admin' password as the 'admin' entry will not be displayed.

NB. **Change Users Password** differs fundamentally from the **File | User Preferences | Password** routine which is used to change your own password providing that you know the old one (see Changing your own password).

Creating a new password

1 From the **Configuration** menu in the System Manager module, choose **User Logins**.

2 From the **User Logins** walk-right menu, choose **Change Users Password**.

3 In the **Select User** dialog choose the appropriate user (see Search routines) whose password needs setting up ('admin' will not be shown if the *Hide 'admin' account from System and Personnel modules* workflow setting is checked).

4 Type in the **New Password** in the first field, making sure it is no longer than 12 characters and also taking account of Password Constraints (if any) listed at the right of the dialog. These constraints emanate from the Password Configuration dialog that is most likely to be controlled by the system administrator.

5 Type the password again in the second field to confirm - the two boxes must be identical before you may proceed.

6 Click **OK**.

The new password is now ready for use.

7.2.1.3 Restoring a locked out user

Users will be 'locked out' of the system if they attempt to login to the system (unsuccessfully) more than the number of times allowed (see Password configuration). A notification *User locked out of database* is automatically sent to the administrator when a user becomes locked out of a database. The **Restore Locked Out User** dialog enables you to restore system access to the user who is locked out.

1 From the **Configuration** menu in the System Manager module, choose **User Logins**.

2 From the **User Logins** walk-right menu, choose **Restore Locked Out User**. The standard **Select User** list will appear containing only names of users who have been locked out.

3 In the **Select User to Restore** dialog, double-click on the relevant user or highlight the user and click **OK**.

The selected user will now have their access to the system restored.

NB. The Locked Out History report displays a list of all users who have been locked out, plus the relevant dates and times.

7.2.1.4 Assigning delegates

Delegates, who may approve documents or CRQs on your behalf, are set up in two separate places, depending on whether you are setting them up for yourself or for other approvers.

- Setting up your own delegates is via the **Delegates** page of the **User Preferences** dialog.
- System administrators (or other users with relevant access) may set up delegates for other users using **Configuration | User Logins | Assign Delegate Users**.

Both dialogs default to allow all individual users and personnel groups to be delegates.

Access to the two levels of delegation is controlled in separate options by the administrator in the **Access** menu options (System Manager module). This means that users can be given access to set up their own delegates but are unlikely to have access to assign delegates for other users.

NB. The administrator is allowed to approve documents and change requests on behalf of any user without the need for delegation to be set up.

Setting up delegates for yourself

1 Select **User Preferences** from the **File** menu and go to the **Delegates** page.

2 The **Delegates** dialog will appear showing a list of all users and groups with valid logins (apart from admin. and the selected user).

3 To select from lists, the check box marked *Allow all users to act as a delegate for me* must be de-selected (the default is selected).

4 Add or remove delegates by double-clicking or using the central arrow buttons. The list on the left hand side of the window shows users and groups available for delegation (you may have a combination of both lists). The right hand lists show selected delegates.

5 Click **Apply** to set up the delegates as you wish and to continue working in the **User Preferences** dialog. Click **OK** to save the selected delegates and close the dialog.

A 'Delegates changed' entry will be written to the **Personnel History** page for the user. Right-click on this entry to reveal the names of delegates added or removed.

The only user(s) who will now be able to see and therefore approve documents or change requests on behalf of the original user (**Control | Approve Document For** and **Changes | Approve Change Request For** in the Document Control module) will be those who have been nominated as delegates.

Assigning delegates for other approvers

Providing that you have been granted access to the **Assign Delegate Users** dialog you may also set up delegates for others as well as yourself. To do this...

1. Select **Configuration | User Logins** in the System Manager module and choose **Assign Delegate Users** from its walk-right menu.
2. The **Select Member of Personnel** dialog will appear listing all users with a valid login.
3. Select the user for whom you wish to assign delegates. Double-click or click **OK**.
4. The **Set Delegates** dialog will appear showing a list of all users and groups with valid logins (apart from admin. and the selected user).
5. Proceed as for above, **Setting up delegates for yourself** (from 3 onwards).

7.2.2 Departments

This routine is used to set up departments for members of personnel. Apart from the obvious advantages this gives in personnel records, the option is also used widely in search routines. For example, with a straight-forward on-screen enquiry, it is possible to retrieve all records of personnel belonging to a specified department.

A check box on the Department dialogs allows you to 'hide' departments that are not needed (but cannot be deleted because they have been used in existing records). Hidden departments can be shown and/or reactivated by de-selecting the appropriate check box - see Hiding / showing departments, below.

Creating / editing a department

1. From the **Configuration** menu in the System Manager module, choose **Departments**.
2. In the **Select Department** dialog, click the **New** button (or select an existing department to edit - see Search routines if you need help with this). If the department you wish to edit is hidden, tick the *Show hidden Department* check box.
3. Type in a new department in the mandatory field marked **Description** (or edit an existing one).
4. Enter / edit any relevant **Notes**.
5. Click **Save**.
6. Repeat from point 3 for any other new departments or click **Close** to exit this dialog.

In **Edit** mode, use the **Undo** button to undo any edit changes made to the selected department's details in this session. You may only **Delete** departments if no reference has been made to them anywhere in the database; however you will be given the option to 'hide' unwanted departments.

Hiding / showing departments

1. From the **Configuration** menu in the System Manager module, choose **Departments**.
2. In the **Select Department** dialog, select the department you wish to hide or reactivate (show). If you wish to reactivate a department that is not currently showing in the list, tick the *Show hidden Department* check box.

3 In the **Edit Department** dialog, select or de-select the *Hide Department* check box and make any further amendments to the department record if required.

4 Click **Save**.

7.2.3 Personnel groups

Personnel groups can cross department or team boundaries and can consist of any set of employees across an organisation sharing a common interest. Examples include special interest groups, distribution lists for documents, committees and so on. Any individual can belong to multiple personnel groups.

In most situations within Workbench where individuals can be selected from a list, a personnel group may also be selected. This can provide a very fast method of setting up user lists of a certain type if suitable groupings can be identified. For example, if you are creating distribution lists for documents, then it is obviously much quicker to pick groups for this purpose than to identify every individual involved, a much more tedious and error-prone process.

A second advantage in using groups is that new employees joining a group are immediately and automatically issued with the documents on that group's distribution list.

Creating / editing a personnel group

1 From the **Configuration** menu in the System Manager module, choose **Personnel Groups**.

2 From the **Select Group** dialog, click **New** or highlight and click the required personnel group to select for editing. (See Search routines if you need help with this.)

3 Complete the **Create Group** dialog. **Edit Group** works in exactly the same way.

4 Enter (or edit) a **Name** for this group (mandatory field).

5 The *Suppress distribution messages for users added to / removed from group* check box defaults to checked (see below) and if left this way, all tasks and notification messages regarding distribution and issue will NOT be sent, regardless of the set-up of the Tasks and Notifications pages on the **Workbench Configuration Centre**.

If you de-select this check box, messages will be sent (or not sent) according to the set-up of the **Tasks** and **Notifications** pages in the Workbench Configuration Centre.

6 Add any **Notes** where relevant.

7 Add or remove personnel from this group (see Groups / Lists if you need help with this).

To abandon an operation when creating / editing a group, click **Cancel** and then confirm your wish.

Delete and **Undo** buttons are only available when in **Edit** mode. The **Delete** button allows you to delete the selected group; the **Undo** button clears any amendments made in the current edit session.

NB. The Groups report shows which Personnel Groups different members of personnel are attached to; the Group History report gives further information on when personnel were added to or removed from the groups.

7.2.4 Priority

In most Workbench modules, tasks can be prioritised by the actionee; this is done when viewing the full list of tasks revealed by clicking on the Tasks button on the main toolbar (see Tasks button / Priority).

Although the actual prioritisation of tasks is done by the individual actionee, the levels of priority are system-wide and are set up by the system administrator in the System Manager module.

All priorities must be given a weighting (mandatory field) on a scale of 1 - 100. Although each priority level is given a description, the software recognises only the numeric values (weighting) when prioritising tasks.

Creating / editing priority levels

1 From the **Configuration** menu in the System Manager module, choose **Priority**.

2 In the **Select Priority** window, click on **New** or select an existing priority level to edit (see Search routines if you need help with this).

3 Enter a mandatory **Description** of the priority or edit an existing one.

4 Give the priority a mandatory numeric **Weighting**.

5 **Save**.

6 Continue inputting (or editing) as many priority levels as you wish and then **Close**. The levels will now appear in **Select Priority** and can be searched for in future by Description (F5) or by Weighting (F6).

In **Edit** mode there is an additional **Delete** button. You may only delete priority levels that are not currently in use.

7.2.5 Reassigning responsibility

The **Reassign Responsibility** dialog enables users to specify either a global replacement or a replacement user for specific areas of responsibility.

The same dialog is used when a user is marked as 'Left' in the Personnel module (**Record | Personnel**) if they have unfinished tasks or are on certain Access lists etc. However, when marking a user as left, all enabled areas of responsibility MUST be processed; when simply reassigning responsibility it is possible, for example, to replace User A with User B in the Document Issue lists, but let all other responsibilities remain unaffected.

A separate Help topic exists for reassigning Workbench Office responsibilities.

For full details on using this dialog for reassigning a leaver's responsibilities, see Leavers.

In all circumstances, you will be prompted on screen throughout.

NB. A workflow setting *Hide 'admin' account from System and Personnel modules*, if checked, will mean that the 'admin' account will not appear when using the Search button to check for users to reassign responsibility to. This means that other users with access cannot reassign tasks etc. to admin. A History entry will be made if this workflow setting is selected or de-selected.

Replacing or removing a user

1 From the **Configuration** menu in the System Manager, choose **Reassign Responsibility**.

2 The length of the **Reassignment of Responsibility** dialog will depend on the number of Workbench elements your company has licensed and how many areas of responsibility need reassigning for the chosen user. The dialog is split into group boxes and only those boxes relating to packages that have been licensed by your company will be visible.

3 At the top of the dialog enter the **Personnel ID** of the user for reassignment (or use the Search button to select from the list of personnel). The system will check to see if this user has any outstanding tasks; if so, a list of those tasks that cannot be reassigned but have either to be

completed by the assigned user or by using the 'On behalf of' menu (providing that the 'On behalf of' element is licensed) will be shown in a Warning message.

4 If you hit the **Yes** button to continue reassigning (or if there are no tasks that cannot be reassigned), the database is scanned for all occurrences of the user and the **Reassignment of Responsibility** dialog will list only those areas for which the user has responsibilities eg. if the user does not 'own' any documents, the 'Document Owner' search button will be disabled.

If all areas of responsibility in a group box are disabled, then the group box itself will not be visible. This shortens the list and shows exactly where and what responsibilities the selected user has.

5 Certain areas of responsibility may simply be removed (by checking the *Remove* check box opposite the required area). The user will be removed from all instances of the specified area without having to have a replacement user - eg. the nominated user may be removed from all Document Approval lists.

6 Some areas can have the same replacement user specified (use the Search button) for all instances of responsibility, eg. Document Owner; alternatively a replacement Document Owner may be specified on a per document basis by checking the *By document* check box. When you hit the **OK** button, the **Reassign User's Responsibilities** dialog will open, listing all documents where the nominated user is the Document Owner and allowing you to replace all or individual documents with a different owner. Hit the **Replace All** button to invoke the **Select Replacement User** dialog and select a single replacement document owner for all the listed documents; double-click on individual documents to invoke the **Select Replacement User** dialog in order to select a different replacement owner for each document.

7 Providing that the 'Global Replacements' element is licensed, you may replace ALL areas of responsibility by checking the *Replace all responsibilities with* check box at the top of the dialog and entering/selecting a staff member. If the 'Global Replacement' element is not licensed, this check box will not be visible.

If you choose to do a Global Replacement, the Scroll box below is cleared.

8 An 'Unlicensed option' message will be displayed in place of Search buttons and/or check boxes where groups, business rules etc. are not licensed. **NB**. Customer Care, Document Control and Nonconformities Business Rules will be enabled even if Business rules are not licensed, as Default Business Rules will still apply.

9 The **OK** button is enabled if EITHER:-

- the *Replace all responsibilities with* check box is checked and a valid staff member has been nominated OR
- one or more of the enabled areas of responsibility have either a new staff member in the replacement search, a *Remove* check box is checked or a *By document* / *By audit* check box is checked.

After you hit the **OK** button, a control panel will show the progress of reassignment.

Depending on how the **Tasks** and **Notifications** pages are set up in the **Workbench Configuration Centre**, relevant messages will be sent to the new and/or replaced users informing them of the changed circumstances.

Appropriate entries will be made to the document's History page when actions have been carried out as a result of a user being marked as left.

7.2.5.1 Reassigning a Workbench Office user

The area for reassigning Workbench Office Access Lists can be found directly under the Document Reviews area. If you click on the **Search** button alongside this field the **Select Replacement User** dialog will appear; select the new user to replace the current one.

Depending on the existing Workbench Office permissions of the user being replaced for a particular document then:-

- if that user is on as an individual they will be replaced by the new user (if they don't already exist on the list)
- if that user is on as part of a group but groups are NOT being reassigned to the new user (ie. 'Replace all...' and 'Personnel groups' are not populated) the new user is added as an individual (if they don't already exist on the list).
- if that user is on as part of a group and groups ARE being reassigned to the new user (ie. 'Replace all...' or 'Personnel groups' are populated) the new user will automatically be given permissions as part of the personnel group (and the Workbench Office access lists reference groups).

If **Remove** is selected then the old user will be removed from the Workbench Office access lists (individual only).

7.3 System Manager reports

The System Manager module supports a number of reports that give information on personnel groups and access levels (by person or template). Each report dialog offers Report Options that allow you to group and order the subsequent records.

The selection of different criteria in these reports will extract different information; a guide to the general purpose of each report is given but the flexibility of the system is such that the information may be used in many ways. Obviously the more specific you are in the areas you include in the search, the fewer number of records are likely to match up.

Reports will only be issued when information matches all the criteria selected; all reports can be directed to a window on screen, to a printer or to file (see Viewing, printing or saving reports).

7.3.1 System Manager report options

Report Options shown at the bottom of System Manager report dialogs allow you to organise records in a variety of ways so that the information given can be as focused and as useful as possible. Options vary slightly with each report to reflect the information offered.

Group by (if offered) allows you to group the subsequent report by individual Personnel (showing which group(s) they are in) or by Group (showing which personnel are in the group). Choose from the drop-down menu.

Order by (if offered) allows you to order the way in which information is shown in reports. In the **Personnel Groups** report for example, the information may be ordered by Group Name, by Date Created or by Date Last Updated. (Order by options for other reports vary.) Select one from the drop-down menu.

Destination allows you to choose where you wish the report to be directed - to screen (for viewing and also giving the option to print), to printer or saved to file. Select one from the drop-down menu. See Viewing, printing or saving reports.

Display group/template notes - where appropriate this check box will be enabled, allowing you to show any notes attached to a selected group or template.

New Page on Group Break? - if you tick this option, a new page will be started for each different group shown in the report.

Print Date/Time Produced? - if this option is ticked, the date and time of the report will be shown on the report itself.

7.3.2 Personnel groups report

This report is used to show which Personnel Groups different members of personnel are attached to. If you do not select any specific members of personnel, the system will simply use its default settings to produce a list of all personnel, ordered alphabetically, showing to which groups (if any) they belong.

Setting up a Personnel Groups report

1 From the **Reports** menu in the System Manger module, choose **Groups**. The **Personnel Groups Report** dialog will appear.

2 Select member(s) of personnel you wish to report on (see Groups / Lists for help if required).

3 To select a Group to report on, highlight it in the Groups box. Hold down the **Shift** button to highlight consecutive groups in a list; use the **Ctrl** button to select non-consecutive groups.

4 Select appropriate Report Options and click **OK** to compile the report.

NB. If you want to report only on members of personnel who are not attached to groups, select the check box at the top of the dialog and simply click **OK**.

The check box marked *Display group notes* in **Report Options** will only be enabled if you choose to group by Group rather than by Personnel; if you then check this box, any Notes recorded against the group(s) will be displayed on the subsequent report.

7.3.3 Group history report

The purpose of this report is to allow Staff and Personnel Group IDs to be selected so that a history report can be generated. If you do not select any specific members of personnel or a group, the system will simply use its default settings to produce a list of personnel showing to which groups they belong or have belonged and the date when they were added or removed.

Setting up a Personnel Group History report

1 From the **Reports** menu in the System Manager module, choose **Group History**. The **Group History Report** dialog will appear. Only personnel who are in one or more personnel groups will be listed.

2 Select the member(s) of personnel to report on (see Groups / Lists for help if required).

3 Highlight the relevant group(s) if required.

4 Select appropriate Report Options.

5 Click **OK** to compile the report.

7.3.4 Access by template report

This report gives information on Template access levels (as opposed to Personnel access levels) down to dialog level if required.

Setting up an Access by Template report

1 Choose **Access** from the **Reports** menu in the **System Manager** module and then, from its walk-right menu, select **By Template.**

2 The dialog works in the same way as the **Personnel Access Report** except that it displays a list of all Access Templates instead of Personnel.

3 The report may be grouped by Template or by Permission.

7.3.5 Show users in template report

This report shows which users belong to which templates. It functions in the same way as the Personnel Groups Report.

Setting up a report to show users in a template

1 Choose **Access** from the **Reports** menu in the System Manager module and then, from its walk-right menu, select **Show Users in Template**.

2 Select Personnel and/or Access Templates you wish to report on (see Groups / Lists).

3 Select appropriate Report Options; this report may be grouped by Personnel or Template. The *Display template notes* check box next to the Group by field will be enabled if you choose to group by Template. Select this if you wish to see notes attached to the template(s).

7.3.5.1 Access by personnel report

This report lists complete access rights of all selected personnel (down to dialog level if required).

Setting up an Access by Personnel report

1 From the **Reports** menu in the System Manager module choose **Access** and then, from its walk-right menu, select **By Personnel**. The **Personnel Access Report** dialog will appear. Personnel selection defaults to show only personnel who do not have template access. To include all personnel, check the box on the **Personnel** page marked *Include personnel with access by template*.

2 Select personnel to report on (see Groups / Lists for help with this if required).

3 Select the access level (from the drop-down menu) that you wish to report down to and highlight the module(s) that you want to include; the subsequent report will show details of all access rights of selected personnel, down to the level you choose from the drop-down menu in the selected module(s). For example, although no difference will be seen on-screen, if you select Dialog from the drop-down menu, the report will show all access rights down to dialog level. If Module is chosen, access rights will be shown as far as module level only.

There are also separate options listed that are not attached to specific modules - eg. Message access to all users. These options should be highlighted for reporting on, if required, in exactly the same way.

4 Set appropriate Report Options. The report can be grouped by Personnel or by Permission.

5 Click **OK** to compile the report.

7.3.6 Locked out history report

The Locked Out History report allows you to see which users have been locked out of the system (ie. no longer able to log on) and gives the date(s) and time(s) of these incidences. Users may be locked out of the system for a variety of reasons, usually to do with password configuration.

None of the selection criteria are mandatory. If no selection is made the report will simply compile a list of all system users who have been locked out and when.

The report can be used to check if selected user(s) have been locked out at any time or to see which users have been locked out (and how many times) during a specified date range.

Compiling a report showing locked out users

1. From the **Reports** menu in the System Manager module, choose **Locked Out History**. The **Locked Out History Report** dialog will appear.
2. Select member(s) of personnel you wish to report on (see Groups / Lists for help with selecting if required). Tick the top check box if you wish to include personnel who have left.
3. Alternatively (or additionally) enter a date that the selected user(s) was locked out from....to.
4. Select appropriate Report Options.
5. Click **OK** to compile the report.

7.3.7 Workbench configuration history report

This report lists all entries that may appear on the History page of the Workbench configuration centre. It allows you to select dates and individual entries to report on.

Setting up a report to show Workbench configuration history entries

1. Choose **Workbench Configuration Centre** from the **Configuration** menu in the System Manager module and then select the **History** page.
2. At the top right-hand side of the page, next to the **Filter** button, click on the **Print** button. The **Workbench Configuration History** dialog appears.
3. Enter a **From Date** and a **To Date** to pinpoint the time-span of the history entries you want to report on.
4. Highlight the entries that you wish to report on. Use the keyboard **Ctrl** button to select more than one non-consecutive entry.
5. Select the **Report Destination** by selecting the appropriate radio button.
6. Select appropriate **Report Options**. Tick the relevant check boxes - the top box for reporting on right-click details (eg. the actual Document display settings that were added and/or removed), the bottom box to print the date and time of the selected entries.

7.3.8 Viewing, printing or saving reports

An Information message will appear when no records can be found which meet the search criteria that you have set up. If you still wish to find records that may match your criteria closely, go back to the selection criteria window and broaden your original selection.

When there are records that match your search and depending on which report destination you chose, ie. Screen (print preview), Printer or File, either the **Print Preview** or the **Print** dialog will appear.

Screen (print preview)

The **Print Preview** dialog will appear when you select the Screen (print preview) destination option for a report (or in any other dialog). If you hold the pointer tool at the bottom of the toolbar, yellow pop-up bars will appear, explaining the feature of each button.

The Print icon allows you to print any material shown in the print preview.

By clicking on the middle of the three magnification buttons, the page will be shown full width.

By clicking on the right of the three magnification buttons, the page will be shown at actual size.

The left magnification button shows the whole page.

The outside arrows take you back to the first page or on to the last.

The single arrows allow you to turn the pages of a report backward or forward.

The number of the current page is shown in the centre.

If, in Report Options, you ticked *Print Date/time produced?* this information will appear on the report itself.

After previewing, use the **Close** button to close the record or print it by clicking on the small printer icon in the top left hand corner. If you elect to print, the **Print** dialog will appear.

Printer

If you selected the **Printer** destination on Report Options or clicked on the print icon in Print Preview, the **Print** dialog will appear. It may differ according to the type of printer you have installed and in some cases you will not have the option to *Print to File*.

1. Configure the printer if necessary.
2. Select the number of copies required and the Page Range.
3. Click **OK** to print the report.

In most instances you may still print to file from this dialog; to do this, click in the *Print to file* check box and then select the type and destination of the file (see **File**, below).

Each report will differ slightly according to the type and information shown but all will follow a similar format. All printed reports are A4 and have a wide left hand edge margin for binding.

File

If you chose the **File** destination option in Report Options the **Print** dialog will appear with the *Print to file* check box in the bottom part of the dialog already checked.

1. Tick the *Print to file* check box if it is not ticked.
2. Select the **Type** of file required from the drop-down list; this list may differ depending on the computer / network system you have installed.
3. Enter **Where** to save the file or select its destination using the **…** button.
4. Click **OK** to save to file in the selected destination (from where it may be e-mailed in the selected format if required).

7.4 Menus at a glance

This page explains briefly, the purpose / scope of each menu item in the System Manager module.

File

Where Am I? Allows you to verify the currently selected database. This is also displayed at the lower right side of the Workbench main window.

Who Am I? Shows your current Login and whether access rights are granted individually or via templates.

Login to Database... Here you may switch to another database without having to exit the system and re-enter. You will, however, still have to log in to the new database as users may have different access rights between databases. If you are already logged in to the system and wish to change who you are logged in as yet remain connected to the same database, do so here.

User Preferences... If viewed in its entirety, this is a four-page dialog allowing you to set up various preferences covering the look and workings of your own machine. Here you may also change your own password and decide which other user(s) should be allowed to process tasks on your behalf, in case of absence. However, access to this menu item and to each individual page is controlled by the system administrator so the whole menu item or aspects of it may not be present.

View Issued Document... Allows you to view issued documents to which you have access (appears only when the Document Control module is also installed).

Quick document links Providing that the Document Control module is installed, the *Use document quick launch facility* workflow setting is set in the **Workbench Configuration Centre |** Workflow Settings (New User/Personal) and the *Number of links to most recently viewed documents* setting is set between 1 and 10, then the last viewed documents (up to a maximum of 10 and dependent on the *Number of links...* setting) will also be available for viewing here. They will be listed most recent first.

Workstation Settings... Allows the setting up of a default database and login that are automatically selected on future start-up. The default dictionary is also set here. Finally you may select which Workbench server to connect to and, optionally, whether the list of servers displayed should be restricted to only those that are running.

Exit Exit the program. A confirmation message is displayed first.

Access

Set User... Allows the configuration of system access for individual users.

Templates... Allows the configuration of system access for user templates.

Configuration

Workbench Configuration Centre... A multi-page and multi-function dialog designed specifically for use by the database administrator where global system settings can be defined / maintained.

User Logins | Test External Mail... Allows the sending of a Workbench test message.

User Logins | Change Users Password... Allows the changing of a user password (without the need for the current password).

User Logins | Restore Locked Out User... Reinstates a user who is locked out of the system.

User Logins | Assign Delegate Users... Allows users to act as delegates for other users.

Departments... Allows the creation and modification of departments.

Personnel Groups... Allows creation/modification of personnel groupings (for doc. access etc.).

Priority... Allows the creation and modification of priority records.

Reassign Responsibility... Replace all assignments (edit lists, view lists etc) for one user with another.

Reports

Groups... Shows details for personnel groups.

Group History... Reports changes in membership of groups either by group or by staff member.

Access | By Personnel... Shows access rights by personnel.

Access | By Template... Shows access rights by template.

Access | Show Users in Template... Shows access rights for each person in a template.

Locked Out History... Gives reports of locked out users.

Module

In this menu you may gain quick access to any other installed Workbench modules.

Audits You will only be able to use this menu item if you have the Audits module installed. If so, please refer to the Audits Help system for full details on its purpose and function.

Customer Care You will only be able to use this menu item if you have the Customer Care module installed. If so, please refer to the Customer Care Help system for full details on its purpose and function.

Document Control You will only be able to use this menu item if you have the Document Control module installed. If so, please refer to the Document Control Help system for full details on its purpose and function.

Nonconformities You will only be able to use this menu item if you have the Nonconformities module installed. If so, please refer to the Nonconformities Help system for full details on its purpose and function.

Personnel This module is installed as an integral part of all modules and facilitates all aspects of personnel administration on the system.

ReportQuest You will only be able to use this menu item if you have ReportQuest installed. If so, please refer to the ReportQuest Help system for full details on its purpose and function.

System Manager This module is installed as an integral part of all modules. It allows the system administrator to define and maintain all global system settings, manage individual user access to Workbench and to arrange user logins and passwords.

Test and Calibration You will only be able to use this menu item if you have the Test & Calibration module installed. If so, please refer to the Test and Calibration Help system for full details on its purpose and function.

Training You will only be able to use this menu item if you have the Training module installed. If so, please refer to the Training Help system for full details on its purpose and function.

Help

Contents Gives access to the Table of Contents for on-line Help.

Topic Search Gives an alphabetic index of Help entries & allows searches for specific topics.

How to Use Help Explains how to use the Help system effectively.

About Workbench Shows the version of Workbench and the number / usage of licences.

8 Workbench configuration centre

The Workbench Configuration Centre has been designed specifically for the database administrator (or any user with appropriate access) to define and maintain all global system settings from one dialog. It is housed in the **Configuration** menu of the System Manager module and consists of five pages, each with different functions.

Workflow Settings page - displays default personal, system-wide and document workflow settings that can only be set by the system administrator (ie. from the System Manager module). With appropriate access rights to relevant dialogs, some default settings may be changed on an individual user basis. When looking at the dialog for the first time it may be a good idea to expand the full list of settings on the **Workflow Settings** page - to view exactly what may be configured.

Tasks page - allows the configuration of external Task messages for a whole module, or for specific messages.

Notifications page - allows the configuration of Notification messages for a whole module, or for specific messages.

Module Settings - this page offers three further configurable elements:-

- Module Settings | Document Clipboard Settings
- Module Settings | Document Display Settings
- Module Settings | User-Defined Actions

History page - logs all changes made in the Workbench Configuration Centre.

8.1 Workflow settings

Workflow Settings are hierarchical. The highest level is maintained by the **Workbench Configuration Centre**. Settings here contain default values that are set at system level and would usually be maintained and controlled by the system administrator. These settings are used to populate Business Rules (in the Customer Care, Document Control and Nonconformities modules) and, if Rules are not used (or the module does not support Rules), then Module Settings.

At Rule creation, the appropriate system default workflow settings will be presented to the user. If the administrator allows changes to these settings, the user may then alter the settings according to this Rule's requirements.

At Document creation, either the matched Rule settings or the system default settings will be presented to the user. Again, if the administrator allows changes to these settings, then the user may alter them according to the document's requirements.

NB. Depending on the type of setting, most changes will not take effect until you next log in.

History entries are generated when workflow settings are selected or de-selected; these are listed on the History page of the Workbench Configuration Centre and show what the change was, when it was made and by whom.

As the list of configurable items on this page is so long, separate Help topics have been set up for each group.

To configure Default System Workflow Settings

1 From the **Configuration** menu in the System Manager module choose **Workbench Configuration Centre**, then select the **Workflow Settings** page.

2 The page is divided into three main sections. Either:-

- tick the *Expand all workflow settings* check box to display the full list of settings in all areas or
- double-click on the heading of the area you wish to expand (New User Settings, System Wide or New Document Settings) or
- click on the + sign alongside the heading of the area you wish to expand

Any item in the list with a plus sign (**+**) alongside means there are further, hidden items in the list; a minus sign (**-**) alongside means that that part of the list has been fully expanded.

New User Settings - the first group of settings also appear on the **Workflow Settings** page of **File | User Preferences** and in **Record | Personnel** (Personnel module) where they are referred to as **Personal** settings. They can also be accessed via the **Personnel | Details** option in the Training module. They may be re-configured in these dialogs by any user with appropriate access.

System Wide - the second group of settings may only be configured from the System Manager module and affect either the Workbench system as a whole or the overall workings of individual modules.

New Document Settings - the last group of settings are specific to the Document Control module and control how documents actually flow through the system. If the *Use document control business rules* workflow setting has been checked (**System Wide | Module Settings | Document Control Settings**) then this group of settings will be referred to as **New Document Business Rule Settings**.

8.1.1 New User settings

New User Settings are the first group of settings originally configured on the **Workflow Settings** page of the **Workbench Configuration Centre** and cover various low priority aspects of a user's workstation and working practices.

For users with appropriate access, these workflow settings are found on the **Workflow Settings** page of the **File | User Preferences** dialog where they are referred to as **Personal** settings. Any changes made to these settings are logged on the Personal History page of the same dialog, which is also updated by the **Edit User / Edit Member of Personnel** dialog (see Creating personnel records).

These **Personal** settings may also be adjusted per user (if required and with appropriate access rights) on the **Workflow Settings** page of personnel records - **Record | Personnel** (Personnel module) or **Personnel | Details** (Training module).

See Personal workflow settings for full details on each setting.

8.1.2 System Wide settings

System Wide workflow settings may only be configured from the System Manager module in the **Workbench Configuration Centre** and affect either the Workbench system as a whole or the overall workings of individual modules.

Inactivity disconnection period

Add notes to external messages

Display job title in QWCS.ini

Hide 'admin' account (System and Personnel modules)

System wide web page settings

Password configuration

Module settings

Workbench office

8.1.2.1 Inactivity disconnection

Four settings here govern how automatic disconnection may be controlled.

- The current *Inactivity disconnection period* is shown in minutes to the right of the screen; this is the time allowed before users are automatically disconnected from Workbench if inactive. (If this time is set to '0' all other inactivity entries will be disabled).
- If the above setting is set to a value higher than '0' then the second option *Inactivity warning period* will be enabled. You may then set the time in minutes that a warning should be given before disconnection.
- The *Apply Workbench inactivity settings to user specified for reserved licence* is checked by default if an *Inactivity disconnection period* is specified. Uncheck this setting if you want reserved licence users also to be disconnected automatically.
- The final setting *Track inactivity in Workbench whilst editing documents* will also be enabled if the first setting is set to a value higher than '0' minutes. For full details on this see Tracking inactivity whilst editing documents.

8.1.2.2 Adding notes to external messages

The **Add notes to external messages** dialog allows users to add notes to any message sent externally and appears automatically when messages are sent via external mail from within Workbench. The setting that allows these notes to be added is found under the **System Wide** heading on the **Workflow Settings** page of the **Workbench Configuration Centre**.

Highlight the entry 'Add notes to external messages'. To allow notes to be added to external messages, the *Use this workflow setting?* check box should be ticked. If the box is unchecked, users will not be given the option to add notes when external messages are sent.

8.1.2.3 Display job title in QWCS.ini

The workflow setting - *Display job title in QWCS.ini* - is unchecked by default. If checked, it will always be applied to all users and in this case a person's job title will be included in the ini file after every entry that contains a person's name (owner, reviewer etc.). This will not be visible in 'ordinary' Workbench routines but for users working with macros, or using the new Workbench Office for Microsoft Office integration then the job title will automatically appear after STAFFNAME eg. STAFFNAME: Joe Bloggs (Team Leader).

8.1.2.4 Hide 'admin' account

This workflow setting allows the 'admin' account details to be hidden from other users (other than admin themselves) who have access to the relevant menu items in the System Manager and Personnel modules. The default for the setting is off.

If the *Hide 'admin' account from System and Personnel modules* setting is checked, then the admin account will be excluded from the staff list in the following dialogs, unless you are logged in as 'admin' :-

Configuration | User Logins | Change Users Password in the System Manager module

Configuration | Reassign Responsibility in the System Manager module

Record | Personnel in the Personnel module

Personnel | Details in the Training module

Training | View Profile in the Training module

This prevents changes being made to the admin account by anyone other than the system administrator.

If the setting remains unchecked then users who have access and rights to the menu items will continue to see the admin account and therefore be able to change aspects of it.

History entries recording who has checked/unchecked the setting will be made.

8.1.2.5 System wide web page settings

These settings, if used, allow users to display a web page as the backdrop to the main Workbench dialog. They are originally configured in the System Wide workflow settings area of the **Workbench Configuration Centre**; further settings in the **New User Settings** filter down to the User Preferences dialog (where they are found on the **Workflow Settings** page and referred to as **Personal** settings). These settings also have a bearing on whether a web page may appear and if so, which web address. If configured to show a web page, it will be displayed all the time the user is logged in but can be hidden /shown using the right-click menu option **Web Page** on the main Workbench screen to toggle on/off.

- *Default web page address* - allows the configuration of a default web address to be shown as the backdrop to the main Workbench dialog. Highlight the setting and the Setting value field opens at the bottom of the page. Enter the web page address. The length of this is unlimited but when the chosen web page is displayed on dialogs, if its length is longer than 40 characters only the first 37 will be shown followed by **....**

- *Allow web page address override* - when checked, allows individual users to override the default web address (above) providing that the **Personal** setting *Display a WEB page in Workbench main dialog* is also checked. The web page displayed will then be the one entered in the **Personal** workflow setting *WEB page address*.

  If unchecked, the **Personal** workflow setting *WEB page address* will be disabled and individual users may only view the default web page, again providing that the **Personal** setting *Display a WEB page in Workbench main dialog* is checked.

- *Show web page address bar* - when checked, the web page address bar will be shown on the main Workbench dialog allowing different web addresses to be entered (if the above permission has also been granted). If the *Allow web page address override* setting is unchecked and the *Show web page address bar* is checked, then the address bar will appear in read-only form so that the user will not be able to navigate to another page from here.

8.1.2.6 Password configuration settings

Passwords are optionally used to log into Workbench and may be required for verification of various routines in different modules - usually at times when extra security is required.

Passwords are configured and maintained for all users on a per database basis by the system administrator under the **System Wide | Password Configuration** section of the **Workflow**

Settings page of the **Workbench Configuration Centre**; the same Password constraints will apply if passwords are used in IntraVista Professional.

With access rights, users may change their own password on the **Password** page of the **File | User Preferences** dialog.

For a full discussion of password constraints see the Help topic Password configuration.

8.1.2.7 Module settings

Various module specific settings are also configured in the **System Wide** workflow settings section of the **Workbench Configuration Centre**. Most use a simple on/off toggle so that if the check box is checked the setting applies, if unchecked, the setting will not apply.

Audit settings

Customer Care settings

Document Control settings

Nonconformity settings

Test and Calibration settings

Training settings

8.1.2.8 Audits settings

There are three workflow settings for the Audits module, configured in the **Workbench Configuration Centre**.

Configuring settings applicable to the Audits module

1. From the **Configuration** menu in the System Manager module choose **Workbench Configuration Centre**.
2. On the **Workflow Settings** page expand the list of entries under the **System Wide** heading (double-click or click on the + sign alongside).
3. Select **Module Settings** and then **Audit Settings** and expand if necessary.

- *Audit user reference must be unique*. To force unique audit User References this check box should be checked. Highlight the entry and check or uncheck the *Use this workflow setting?* as required.

  If checked, it does not mean that entering a user reference is mandatory; it does mean, however, that if you choose to enter a user reference, it must be unique. You will not be able to enter a User Reference when creating an audit template. Instead, a message 'User reference is required to be unique and must be defined once scheduled' will be displayed in place of the **User Reference** field. Any existing user references will remain in the database.

  NB. It is recommended that you think seriously about whether this setting should be used BEFORE starting to work with the module. If any duplications of User Reference already exist, a warning message 'Unable to implement Audit user reference uniqueness due to duplications' will be shown. In this case, try editing the duplicated user references in the **Edit Audit** or **Run Audit** dialogs and then try again to check the setting *Audit user reference must be unique*.

  If the *Audit user reference must be unique* check box is unchecked, any User Reference may be used.

- *Pre-populate NCR with checklist items*. When an NCR is raised from an audit and this workflow setting is checked, then the Category name and Result Description will be copied automatically into the Summary field of the **Report Nonconformity** dialog. The Planning Notes and Result Notes will be copied automatically onto the **Description** page. If an Actual audit Start Date has been entered on the **Run Audit** dialog, then this date will also be copied through automatically to the Date of Incident field on the **Report Nonconformity** dialog.

  If the setting remains unchecked (the default) details will not be copied over.

- *Duplicate initial NCR UDA details to subsequent NCRs for the same audit*. If this setting is checked, any information on the **Analysis** page of a reported NCR will be transferred automatically to subsequent NCRs for the same audit.

  If the setting remains unchecked (the default) Analysis details will not be copied over.

8.1.2.9 Customer Care settings

Various settings for the Customer Care module are configured in the **Workbench Configuration Centre**. All use a simple on/off toggle so that if the check box is checked the setting applies, if unchecked, the setting will not apply.

Changes made to any of these settings will apply only to complaints reported AFTER the settings were changed. The rules in action at the start of any individual complaint cycle will remain with the complaint throughout.

To configure settings applicable to the Customer Care module

1. From the **Configuration** menu in the System Manager module choose **Workbench Configuration Centre**.
2. On the **Workflow Settings** page expand the list of entries under the **System Wide** heading (double-click or click on the + sign alongside).
3. Select **Module Settings** and then the **Customer Care Settings** entry and expand if necessary.
4. Highlight the relevant setting (see below) and the *Use this workflow setting?* check box will open at the bottom of the dialog. Double-click on the entry to toggle the check box on/off.

- Allow *base sign-off list to be set at assessment*. If this setting is checked, when the assessor of a customer complaint hits the **Accept** button after assessing a complaint, they will be given the opportunity to select personnel who will automatically be added to the sign-off list during the complaint's final review. If unchecked, the sign-off list may be generated at final review and/or will use personnel nominated by business rules (if in use).

  A History page entry of the complaint will state that a base sign-off list was set at assessment - right-clicking on this entry will list the staff on the list.
- *Automatically add complaint reporter to sign-off list*. If this setting is checked, the person who reported the original complaint will automatically be added to the complaint sign-off list and a History entry will be made.

- *Complaint description required when reported*. If this setting is checked, a complaint description will be mandatory when reporting a complaint. If unchecked, you may report a complaint without being forced to give a description.

- *Complaint user reference must be unique*. If this setting is checked, when reporting or assessing complaints in the Customer Care module, the system will force the User Reference (if used) to be unique. If unchecked, any User Reference will be allowed, regardless of whether or not it is already in use.

- *Use Customer Care module business rules*. To turn Customer Care module business rules on, highlight the relevant entry and check the *Use this workflow setting?* check box. If unchecked, business rules will not be used in this module.

- *Show users to whom tasks and notifications are sent*. Highlight this entry if you want users to be told when task and notification messages are about to be sent and to whom.
- *Show complaint summary and description in external mail.* This setting will be unchecked by default. If checked, then the complaint summary and description (if one has been entered) must appear in external emails.
- *Display 'Reject' button in 'Assess Complaint'* - the default setting. If unchecked, the **Reject** button in the **Assess Complaint** dialog will be hidden. A History entry will be made when this option is selected / de-selected.

5 When you have configured the settings as you wish, click on the **Apply** button. An information message will confirm that the Workbench Configuration has been updated and you may then continue working with the dialog. Alternatively, click **OK** to save and close the dialog.

8.1.2.10 Document Control settings

Default system settings for the Document Control module are configured by the system administrator (or any user with access) in the **Workbench Configuration Centre**. Most use a simple on/off toggle so that if the check box is checked the setting applies, if unchecked, the setting will not apply.

There are several sub-headings within the list of Document Control settings. Expand the list fully by checking the *Expand all workflow settings* check box at the top of the dialog. Alternatively click on a plus sign alongside an unexpanded entry. A minus sign alongside an entry denotes that the list is fully expanded.

When a document is set, any rule(s) (from Document business rules or Default document business rules) in force will be used. If no rules apply, then the system will use these default document system settings. Changes made to any of these settings will apply only to documents created or imported AFTER the settings were changed. Rules and settings in force at the start of any individual document cycle will remain with the document throughout - ie. later changes will not affect documents already in existence.

NB. Further options covering the actual document workflow are also configurable and information on these is given in separate Help topics - see New Document settings.

Configuring settings applicable to the Document Control module

1 From the **Configuration** menu in the System Manager module choose **Workbench Configuration Centre**.

2 On the **Workflow Settings** page expand the list of entries under the **System Wide** heading (double-click or click on the + sign alongside).

3 Go to **Module Settings** and then select the **Document Control settings** entry and expand if necessary.

4 Highlight the relevant setting (see below) and the *Use this workflow setting?* check box will open at the bottom of the dialog. Double-click on the entry to toggle the check box on/off.

- *Allow document retention period to be changed*. The number of years that a document must be retained is set by the system administrator in the Document Workflow settings section of this dialog (see Document attributes). However, if the *Allow document retention period to be changed* check box is checked, this period may be over-ridden on an individual basis.

  New Document change requests. Click on this actual entry or the + sign alongside to reveal further entries. Click the **Apply** button to update any change.

- *Approval required for new document change requests*. An approver of New Document change requests other than 'admin' may be specified.

  When raising a New Document change request, if this option is checked (the default) then a *Please approve change request* task will be sent to the new document approver (specified in the option below). If the workflow setting is not checked, then the change request will automatically be approved and a *Please create document* task will be sent to the New Document actionee.

- *Approver of new document change requests*. This option will only be enabled if the above setting is checked. To set, highlight the entry and enter the name of the required approver in the **Setting value** field below (using the Search button if required). If set, all New Document change requests must then be approved by this person. If an approver is not nominated (ie. the workflow setting is blank) then 'admin' will be asked to approve the New Document CRQ.

- *Default new document change request actionee*. You may nominate a default Actionee to action a New Document change request after approval. If set, the named default Actionee will appear in the **Actionee** field on the **Raise Change Request** dialog and can only be changed via this workflow setting. To set or amend, highlight the entry and enter the name of the approver in the **Setting value** field below (using the Search button if required).

- *Can change actionee when raising a new document change request*. If checked, the default **Actionee** will be as above but the field on the **Raise Change Request** dialog will be enabled, so that it may be changed.

  NB. If the *Change request approval process* workflow setting in **Document Processing Flow | Document Changes** is unchecked, the person nominated as a New Document CRQ approver (above) will not be asked to approve the CRQ and will not be tasked either. The CRQ will be marked as approved immediately and at the same time, the default New Document change request Actionee (specified above) will then become the approved Actionee of the New Document CRQ.

- *Can only raise CRQs against issued documents*. This is an option to disallow the raising of CRQs against documents that have never been issued. If checked, the **Raise Change Request** dialog will recognise the setting and only display documents that have been issued. If unchecked, the system will allow CRQs to be raised against draft versions of the document.

- *Document title must be unique*. If this setting is checked, the system will force the mandatory **Title** field in the Document Control module, to be unique. If unchecked, any title will be allowed in the module, regardless of whether or not it is already in use.

- *Include document title in temporary document filename when viewing documents* - this setting will be unchecked by default. If checked, then upon viewing a Workbench document, the temporary document filename should include the document title.

  The system automatically checks that the length of the filename does not exceed the Windows limit and that all 'out of range' characters are removed. The temporary number at the start of the filename will still be used in order to make the document filename unique.

- *Document user reference must be unique*. If this setting is checked, the system will force any **User Reference** (if used) in the Document Control module to be unique. If unchecked, any User Reference will be allowed in the module, regardless of whether or not it is already in use.

- *Include document synopsis in external emails*. If this setting is checked, a document's **Synopsis** will be included when sending Document Control emails. The setting defaults to off.

- *Include IVPro link for all document external mails*. This setting is unchecked by default. If checked, all document external mails will automatically include an IVPro link.

- *Use document control business rules*. If checked, Business rules will automatically be used; if unchecked, lists may be populated manually at appropriate stages of the document's lifecycle. (See **Document business rules** in the Document Control module for further information on using Business rules).

- *Track document viewing statistics*. This setting defaults to off. If checked, it gives users the ability to create reports in the ReportQuest module that will show the number of times a document has been viewed in Workbench, IntraVista and/or IVPro.
- *Do not prompt users to delete source document* defaults to unchecked. If checked, the **Confirmation** dialog offering the user the option to delete the source file will not be displayed when the document has been imported.
- *Automatically delete source document* may be set if the *Do not prompt users to delete source document* setting (above) is checked. If both settings are checked the imported file will be deleted automatically. If unchecked, the file will remain.

  Document creation. Expand for the following options.

- The first option, if checked, allows users to *Import documents*. If this option is unchecked, the **Import from File** field at the top of the Create **or Import Document** dialog (**Documents | Create or Import Document**) will be disabled.
- Likewise, if the *New document based on master template* option is unchecked, then the **Base on Template** field in the **Create or Import Document** dialog will be disabled.
- If *New document based on existing document* is unchecked then the **Base on document field** in the **Create or Import Document** dialog will be disabled so the option to base a new document on an existing document will not be allowed. However, if this option is highlighted and checked, a further five options will then be displayed:-
  - *Copy workflow settings from base document*
  - *Copy access lists from base document*
  - *Copy keywords from base document*
  - *Copy document references from base document*
  - *Copy user defined analysis from base document*
  - *Copy associated courses from base document*

  When you create a new document based on an existing one you have the option to copy any or all of the above (shown on each **Document attributes** dialog as separate pages - **Workflow Settings**, **Access**, **Keywords**, **References**, **Analysis**, **Courses**) directly through to the new document.

  If creating a document based on another Workbench document in the same database, and the above setting *Copy workflow settings from base document* is checked, then all the workflow settings for **Workbench Office** (if licensed and checked for use) will also be copied across to the new document, including the access lists.

  All are set in the same way. Highlight any entry and the *Use this workflow setting?* check box will open at the bottom of the dialog. Select or de-select by ticking the check box as required against each entry.

Finally there is a section offering the option to import documents from other external Workbench databases. When users are creating documents within the database, these settings allow them to copy onto the same server other documents that already exist within a different Workbench database.

- *Allow importing of documents from different databases* - this setting will be unchecked by default. If checked, it enables the *Import from another DB* option in the **Create or Import Document** dialog.
- *Log into selected database as admin (current user if unchecked).* This option is only available if the above setting is checked. If both settings are checked then the system will log users into the other database as 'admin' regardless of their current login. If this setting remains unchecked, then the user will be logged in with their current user login; if this is the case, the

user must also exist on the other database.

- *Only show documents that all users can view* - this setting will be unchecked by default and may only be checked if both the settings above have been selected. This workflow setting, if selected, will force the admin login (see above) to show only documents that can be viewed by all users. If it left unchecked then all documents will be visible for selection on the other database.

5 When you have configured the settings as you wish, click on the **Apply** button. An information message stating that the preferences have been changed will follow and you may continue working with the dialog. Alternatively, click **OK** to save and close the dialog.

8.1.2.11 Nonconformity settings

Settings for the Nonconformities module are configured by the system administrator in the **Workbench Configuration Centre**. All use a simple on/off toggle so that if the check box is checked the setting applies; if unchecked, the setting will not apply.

Changes made to any of these settings will apply only to nonconformities reported AFTER the settings were changed. The rules in action at the start of any individual NCR cycle will remain with the nonconformity throughout.

Configuring settings applicable to the Nonconformities module

1 From the **Configuration** menu in the System Manager module choose **Workbench Configuration Centre**.

2 On the **Workflow Settings** page expand the list of entries under the **System Wide** heading (click on the heading or click on the + sign alongside).

3 Go to **Module Settings** and then select the **Nonconformity Settings** entry and expand if necessary.

4 Highlight the relevant setting (see below) and set as required.

- *Automatically add nonconformity reporter to sign-off list*. If this setting is checked, the person who reported the nonconformity will automatically be added to the NCR sign-off list and a History entry will be made.

- *Calculate NCR target date automatically*. When an NCR is reported you may manually select a target date by which the NCR should be resolved. To ensure that a target date is entered automatically, the *Calculate NCR target date automatically* setting should be switched on. Highlight this entry and check the *Use this workflow setting?* box below.

- To configure the actual target date, a value should be entered for the *Number of days added to NCR date reported for target date* (enabled when the top setting is checked). Highlight this entry and enter the required number of days in the **Setting value** field at the bottom of the dialog. When reporting an NCR, the system will now add this number of days to the date that the NCR is reported, calculate the target date and automatically enter it on the **Report Nonconformity** dialog. The calculated target date may, however, be amended at the time of reporting or assessing the NCR.

  If the *Calculate NCR target date automatically* setting is switched on but the *Number of days added to NCR date reported for target date* setting value is set to '0', then the target date will be entered as the end of the day that the NCR was reported.

- *Send a warning to the owner for incomplete NCRs*. Use this setting to set up an automatic warning if an NCR has not been completed within its specified time. When it is checked, the setting below will be enabled, allowing you to set the required time to elapse before sending a warning.

- *Number of days after NCR reported before warning is sent to owner*. This setting will only be enabled when the setting above is checked. If it is, enter the required **Setting value**. For example, if this is set at 14, after two weeks if the NCR has not been completed, the NCR owner will be sent the notification '14 days have elapsed since reporting NCR <number> and it is still outstanding'.

If the **Setting value** is set to '0', no warnings will be sent.

- *Use nonconformity business rules*. To turn the Nonconformity module business rules on, highlight the relevant entry and check the *Use this workflow setting?* check box. If unchecked, business rules will not be used in this module.
- *Show users to whom tasks and notifications are sent*. Highlight this entry if you want users to be told when task and notification messages are about to be sent and to whom.
- *Show NCR Description in external mail* **-** this setting can be checked or unchecked at a per database level. If checked, then each external mail message sent by that database will have the entire NCR Description within the body of the e-mail (in addition to the NCR Summary that is automatically included).
- *Nonconformity user reference must be unique*. If this setting is checked, the system will force a **User Reference** (if used) in the Nonconformities module to be unique. If unchecked, any User Reference will be allowed in the module, regardless of whether or not it is already in use.
- *Display 'Reject' button in 'Assess Reported Nonconformity'* - the default setting. If unchecked, the **Reject** button in the **Assess Reported Nonconformity** dialog will be hidden. A History entry will be made when this option is selected / de-selected.
- *NCR Severity is mandatory field,* when checked, forces the **NCR Severity** field to be mandatory.
- *NCR Customer/Contact is mandatory field*, when checked, forces the **NCR Customer** and **Contact** fields to be mandatory.
- *Allow remote NCR import.* If selected, allows you to set up an offline 'form' (a text file) for reporting NCRs that, when forwarded to a third party who has the Nonconformities module installed, will then automatically populate the existing **Report NCR** form when Workbench fires up.

5 When you have configured the settings as you wish, click on the **Apply** button. An information message stating that the preferences have been changed will follow and you may continue working with the dialog. Alternatively, click **OK** to save and close the dialog.

8.1.2.12 Test and Calibration setting

There is only one Test and Calibration workflow setting, configured in the **Workbench Configuration Centre |** Workflow Settings page **|** System Wide **|** Module Settings **|** Test and Calibration.

- *Number of days before test start date that task is sent to the tester* if selected, allows you to send a reminder to testers that a test is imminent. Highlight the entry and enter the required number of days in the **Setting value** field below.

  The task message *Please run test assigned to equipment item* will then be sent on the specified number of days BEFORE the test start date rather than on the day itself. The actual due date of the test will be shown in the Date Due column of the Tasks list.

8.1.2.13 Training settings

The three workflow settings for use with the Training module are configured in the **Workbench Configuration Centre** by the system administrator (Workflow Settings page | System Wide | Module Settings | Training module).

- *Allow changes to User Defined Analysis when completing a course* - the default is for this check box to be unchecked. If checked, you may continue to update user defined analysis on the **Analysis** page of the **Complete Scheduled Course** dialog when completing / entering results of a course.
- *Number of days before course start date that task is sent to trainer* - if required, this option allows you to enter the number of days before a course is due to be run that the task message *Please run/complete course* <xxxx> will automatically be sent to the Trainer. To set, highlight the entry and enter the required number of days in the **Setting value** field below.
- *Number of days before course start date that tasks are sent to attendees* - if required, this option allows you to enter the number of days before a course is due to run that the task message *Please attend course* <xxxx> will automatically be sent to course Attendees. To set, highlight the entry and enter the required number of days in the **Setting value** field below.

8.1.2.14 Workbench Office password settings

The separately licensed **Workbench Office for Microsoft Office** provides much greater integration between Workbench and Microsoft Office, specifically Word, Excel, PowerPoint and ** Outlook. This is done by the production of an add-in that works with Office 2007 and above. As the add-in is a separately licensed area of Workbench, if unlicensed, none of the following workflow settings will be displayed.

The settings control whether Workbench Office is used or not and the security features are set up on a per user / per document basis in the Workbench Configuration Centre (**System Wide | Workbench Office**). **These settings will not be applied to documents imported into Workbench from Microsoft Outlook.

All settings will be unchecked by default and are dependent on the first setting *Password requirements for exporting documents out of Workbench* being checked - when this is done the following options will open up.

- *A minimum length password is required* - when checked, a password will be required when saving out of Workbench; the option, *Password minimum length*, will open and you should enter the minimum number of characters required in the *Setting value* box at the bottom of the dialog.
- *Password must contain mixed case characters* - when checked, the password should contain a mixture of uppercase and lowercase letters.
- *Password must contain letters and numbers* - when checked, the password should contain at least one letter and one number.

Passwords can be configured to meet any or all of the above constraints.

Further workflow settings, controlling the actual way in which Workbench Office is used, are on a per document basis and discussed in a separate Help topic Workbench Office for Microsoft Office.

8.1.3 New Document settings

In addition to default System settings for the Document Control module, there are further configurable options that control the actual document workflow. These are referred to as **New Document Settings** (or **New Document Business Rule Settings** if the *Use document control* *business rules* workflow setting has been checked - System Wide | Module Settings | Document Control settings - and they are initially controlled from the System Manager module in the **Workbench Configuration Centre**.

Any changes made to the New Document settings will be recorded on the History page of the Workbench Configuration Centre dialog.

There are several sub-headings within the list of New Document settings. Expand the list fully by checking the *Expand all workflow settings* check box at the top of the dialog. Alternatively click on a plus sign alongside an unexpanded entry. A minus sign alongside an entry denotes that the list is fully expanded.

For users with appropriate access, **Workflow Settings** pages are also shown on various dialogs in the Document Control module. The system administrator may deny access to these settings altogether (in which case the Workflow Settings page will not be visible), may grant Read-only access, or may give Update rights which allows individual users to amend the settings for a specific document (or Business rule, if in use) - see Setting access levels.

Again, any changes made to the settings in this way will be recorded on the History page of the Workbench Configuration Centre dialog.

Configuring document workflow settings

1. From the **Configuration** menu in the System Manager module choose **Workbench Configuration Centre** (or click on a **Workflow Settings** page in relevant dialogs in the Document Control module).
2. On the **Workflow Settings** page expand the list of entries under the **New Document Settings** heading (click on the heading or the + sign alongside). There are four main sections controlling workflow, each with further sub-headings when expanded. Each section is covered by separate Help topics:-

   Document attributes   Document processing flow   Reviews   Annotations
3. When you have configured the settings as you wish, click on the **Apply** button. An information message stating that the preferences have been changed will follow and you may continue working on other aspects of the dialog. Alternatively, click **OK** to save and close the dialog.

NB. Users viewing **Workflow Settings** from a dialog in the Document Control module may have been granted Read-only access, in which case you will not be able to amend any of the settings.

8.1.3.1 Document attributes

The first group of configurable options controlling document workflow come under the heading **Document Attributes**.

Configuring document attributes (New Document settings)

1. From the **Configuration** menu in the System Manager module choose **Workbench Configuration Centre**.
2. On the **Workflow Settings** page expand the list of entries under the **New Document Settings** heading (click on the actual entry or the + sign alongside).
   NB. If Document Control business rules are in use this heading will read as **New Document Business Rule Settings**.
3. Select the **Document Attributes** entry and expand further if necessary.

- *Number of years that a document must be retained*. This option is self explanatory and sets the number of years that a document must be held in the system before it can be withdrawn. (If required, the administrator may allow this retention period to be changed by switching on the top option in the Document Control settings.) To alter the number of years that a document must be retained, highlight the relevant entry and the **Setting value** field will open at the bottom of the dialog. Enter the required number of years and click on the **Apply** button to make the change.

Workbench Questionnaires. Click on this actual entry or the + sign alongside to expand.

- The *Use Workbench Questionnaires* option will appear - double-click on this or highlight and click the *Use this workflow setting?* to reveal further options.

- *Number of random questions to ask? (0=all questions will be asked)* Providing that the above setting is checked, this setting allows you to specify how many questions from the Questionnaire should be asked when acknowledging receipt of a document.

- Providing that the *Use Workbench Questionnaires* setting is checked, the *Number of correct answers required? (0=all questions must be answered correctly)* setting allows you to specify how many correct answers must be returned before receipt acknowledgement will be accepted.

Advanced document attributes. Click on this actual entry or the + sign alongside to expand the list. The first five options here are all switched on or off in the same way. Highlight the required entry and select or de-select using the *Use this workflow setting?* check box at the bottom of the dialog. Click the **Apply** button to update any change.

- *Encrypt document during transmission*. By ticking this check box, highly sensitive documents may be encrypted for security reasons (see Encrypting transmissions), but please be aware that this will increase the amount of time needed to fetch the document.

- *Enable macro file population in IntraVista and IVPro*. If checked, this setting will ensure that any documents fetched via IntraVista or IVPro will receive the correct and up-to-date Workbench information, which are populated via macros. When a document is requested, the QWCS.INI file is updated with the current document's details, either via a Java Applet or an Unsigned ActiveX Control (as specified in the Workbench Configuration Manager). The document can then be fetched automatically and displayed on the client. This then allows the selected document to read the updated details from the QWCS.INI file.

- *Parse documents in IntraVista*. If checked, IntraVista will assume that the text is generated in native HTML; it will try to parse the document and generate the dynamic hypertext references to allow document jumping.

- *Convert document to PDF format*. The default for this setting is 'Never'. However if the setting is selected, a drop-down list will appear in the *Setting value* box at the bottom of the dialog, offering two further options.

  - if the 'Never' option is selected then the issued version of the document will simply be a copy of the draft version and can never be modified.

  - if either the 'When marking document ready for approval' or 'When issuing the document' option is selected, then the approved or issued document will automatically be converted to PDF at the appropriate time. Workbench and IVPro will display the PDF version of the document in the **Approve Document** dialog only; all other views will show the original draft document. All views of the issued document in Workbench, IntraVista or IVPro will display the PDF version.

  If either 'When marking document ready for approval' or 'When issuing the document' option is selected, then the *Retain previously issued versions in PDF format (if applicable)* setting, see below, will open.

  A History entry in the **Workbench Configuration Centre** will show if the *Convert document to PDF* value is changed.

- *Retain previously issued versions in PDF format (if applicable)* may be set if the *Convert document to PDF format* setting (above) has an option other then 'Never' selected. Configuring these two workflow settings together allows you to choose whether retained documents should be displayed in their 'native' application or in PDF format.

- *Make document read-only when viewing* - is unchecked by default. If checked, then the words 'Read Only' are displayed alongside document titles at the top of the screen when a document is opened in View mode.
- *Auto increment document revision* - is unchecked by default. If checked then three further workflow settings will be enabled, *Major revision increment*, *Minor revision increment* and *Default edit severity*.

  If auto-incrementation is being used then values can be set to X.00, 0.X0 or 0.0X but a major increment MUST be of a higher or equal value than a minor increment (Major defaults to X.00, Minor defaults to 0.0X). The Default edit severity defaults to Minor but can be changed to Major or Not specified. If 'Not specified' is selected, checks will be made at the appropriate time to ensure that the revision number has been manually incremented.

Workbench Office for Microsoft Office - see separate Help topic.

Solus Offline Synchronisation - see separate Help topic.

See also: Document processing flow Reviews Annotations

8.1.3.2 Encrypting transmissions

Workbench has grown from a product intended initially for use in small workgroups and then single sites. Due to the increased scalability provided by the use of InterBase Objects and the Atlas application server architecture, Workbench is now increasingly being used across multiple sites. This means that there could be a real danger of network traffic between the server and the clients being intercepted by a third party. This is especially important for documentation that may be of a highly sensitive nature.

We advise that the *Encrypt document during transmission* workflow setting option should be used wherever security is of the utmost importance, especially if using Workbench over an insecure connection.

Workbench uses RSA encryption in a manner similar to that used by SSL.

8.1.3.3 Workbench Office for Microsoft Office

This is a separately licensed area providing greater integration between Workbench and Microsoft Office, specifically with Word, Excel, PowerPoint and Outlook. Integration is carried out by the production of an add-in that works with Office 2007 and above. The Microsoft Office applications (apart from Outlook - see below) are controlled, on a per document basis, by workflow settings that enable/disable Copy & Paste, Print, Print Preview, Save & Send, Edit.

There is no need for macros as Microsoft Word only uses document variables to allow tags to be set up from the Workbench Office Add-In; this automatically populates with Workbench data.

Outlook emails can also be saved straight into Workbench, including attachments. However, be aware that the settings governing Workbench Office regarding who can copy, paste, print etc. will not apply to documents that have been imported into Workbench from Outlook; anyone who can view the document will be able to perform any of the functions. Microsoft documents (Word, Excel and PowerPoint) can also be saved directly into Workbench - there is no need to save the document and load Workbench separately in order to import the document.

Microsoft Word and Excel allow the assignment of a password to a document when saving externally so that only personnel that know the password can access the document outside of the Workbench environment. Additional options allow the add-in to write security into docx type documents so that saving/printing documents (on a per document basis) can be prevented (ie. the add-in is not needed in order to secure/disable certain features within Word).

If not licensed, or licensed and not 'turned on' for a specific document, none of the workflow settings below will be seen.

Full details of how this add-in works are given in the relevant section (Workbench /Microsoft Office integration) in the Document Control module.

The following workflow settings (**New Document** (**Business Rules**) **Settings | Document Attributes | Advanced Document Attributes | Workbench Office for Microsoft Office**) are configured on a per document basis and control whether Workbench Office is used or not and, if so, who may use it and in what capacity. Click on the actual **Workbench Office for Microsoft Office** entry (at the bottom of the Document Attributes | Advanced Document Attributes list) to expand the options.

- *Use Workbench Office for Microsoft Office?* This workflow setting determines whether or not Workbench Office should be used at all for this document. If it is unchecked (the default) then all the other Workbench Office workflow settings will be disabled and count as inactive. If checked all the other settings will be active, unless dependent upon another workflow setting.
- *Protect document?* This workflow setting is a dependant sub-entry of the *Use Workbench Office for Microsoft Office?* workflow setting and is unchecked by default. All its sub-entries will be disabled unless it is checked. If it is checked, then when the Workbench Office document is viewed (but not when it is being edited) the Office application menus (Word, Excel and PowerPoint) and toolbars except those specified in the sub-settings will be disabled to prevent the user modifying the document.

  However, please **be aware** that this protection does not extend to emails imported into Workbench using Outlook; if a user can see the email/document then they will be able copy, paste, print etc. regardless of the how the following settings have been configured.

  NB. *'All users'* in the options listed below refers to all users who have access to the document in question.
- *Allow all users to copy & paste?* This workflow setting is dependent upon the *Protect document?* workflow setting and will be unchecked by default. When checked, the **Copy** menu and button will still be available to all users in the Office application when viewing a document.
- *Allow all users to print?* This workflow setting is dependent upon the *Protect document?* workflow setting and unchecked by default. When checked, the **Print** menu and button will still be available to all users in the Office application when viewing a document.
- *Allow all users to print preview?* This workflow setting is dependent upon the *Protect document?* workflow setting and unchecked by default. If it is checked, then the **Print preview** menu and button will still be available to all users in the Office application when viewing a document.
- *Allow all users to save and send?* This workflow setting is dependent upon the *Protect document?* workflow setting and unchecked by default. If it is checked, then the **Save & Send** menu and button will still be available to all users in the Office application when viewing a document.
- *Allow all users on the edit list to view this document unprotected?* This workflow setting is dependent upon the *Protect document?* workflow setting and is unchecked by default. If it is checked, then none of the menu items and toolbars will be disabled when a document is being viewed if the user viewing it has edit rights to the document.
- *Password protect save and send?* This workflow setting is dependent upon the *Protect document?* workflow setting and unchecked by default. If it is checked, then on selecting **Send – E-mail** on an Office application (Word or Excel) or attempting to **Save**, the user is required (by prompting) to enter a password before either action is allowed.
- *Require add-in in order to view document?* This workflow setting is a dependent sub-entry of

the *Use Workbench Office for Microsoft Office?* workflow setting and is unchecked by default. If it is checked, then the document can not be opened at all if the user does not have the necessary add-in installed.

Passwords for Workbench Office are set up on a per user / per document basis (**System Wide | Workbench Office**) and are discussed in the Help topic Workbench Office password settings.

8.1.3.4 Solus offline synchronisation

The **Offline Synchronisation** workflow settings that control **Solus** can be found at the bottom of the list under **New Document (Business Rules) Settings | Document Attributes | Advanced Document Attributes**. However, if the Solus application is not licensed then these workflow settings will not be visible.

If you expand the **Solus Offline Synchronisation** entry, three further entries appear.

- *Allow document to be synchronised*. The default for this option is off. Double click (or highlight and check the *Use this workflow setting?* check box at the bottom of the dialog) in order to allow synchronisation for this document. Unless this option is checked, the document cannot be updated when synchronisation takes place and will not appear in the Document Viewer grid when connecting off-site.
- *Document validity period*. This is the period that the document will continue to be 'valid' before being prompted to update (synchronise). If the difference between the current date and the last synchronised date is greater than this value, then although the document will still be displayed in the grid, it will not necessarily be up to date. A message will appear prompting you to synchronise and re-validate the document. You still have the option to view the document before updating.

  If the *Allow document to be synchronised* option is checked and the validity period is set at zero, then synchronisation of that document will be constant and the Offline Validity Period (shown in the document's attributes) will be referred to as 'Always Valid'.
- *Document validity period units*. Select whether the validity period should be in days, weeks, months or years.

8.1.3.5 Document processing flow

The second group of configurable options controlling document workflow comes under the heading **Document Processing Flow**. Options here, if used, will have an impact on the way a document is processed. However, it is important to remember that any settings made on the document itself will always take precedent over any of the defaults set here.

Configuring document processing flow options

1. From the **Configuration** menu in the System Manager module choose **Workbench Configuration Centre**.
2. On the **Workflow Settings** page expand the list of entries under the **New Document Settings** (or **New Document Business Rule Settings**) heading (click on the actual entry or the + sign alongside). Alternatively check the *Expand all workflow settings* check box at the top of the dialog to see the complete list of entries.
3. Select the **Document Processing Flow** entry and expand further (unless already expanded). There are five sub-headings covering document approval, issue, distribution, changes (including withdrawals) and viewing options; select the required entry and expand the list further if necessary.

All settings here are switched on or off in the same way. Those with a tick against them are in use. To toggle between on/off, simply highlight the required setting and select or de-select the *Use this workflow setting?* check box at the bottom of the dialog. Several options are interdependent and will be disabled unless their related option is switched on (checked).

4 When all the settings have been configured as required, click the **Apply** button to update and continue working in the dialog. Or click **OK** to save changes and close the dialog.

See also: Document attributes settings Reviews Annotations

8.1.3.6 Document approval settings

Document Approval workflow settings (System Manager module | Configuration menu | Workbench Configuration Centre | **Workflow Settings** page | **New Document Settings** (or **New Document Business Rule Settings** if Business rules are being used)) are shown below.

- *Document approval process.* If checked, on completion of editing (if allowed), or after importing or creating a document, the user can elect to 'Mark the document ready for approval'. The document requires an approval list where the approvers must approve or reject the document.

  If unchecked, on completion of editing (if allowed), or after importing or creating a document, the user can elect to 'Mark the document ready for issue' (providing that the *Require formal issue process option is also checked* - see below) or issue the document (if the *Require formal issue process option* is unchecked - see below). No approval list is required.

- *Allow approval of document without viewing* - this option will be disabled unless the above option is checked. If checked, users will be required to view the document before being able to approve it. If unchecked, users may approve the document without viewing it.

- *Display warning if approving without viewing* - this option will be disabled unless the above option is checked. If checked, the **Document Approval** dialog will provide a warning to the user if they try to approve the document without first viewing. If unchecked, users may approve the document without viewing it and will not receive a warning.

- *Require a reason for approval*. You may specify that a reason for document approval is required. A menu option **Approval reasons** enables you to set up these reasons that will then appear on a drop-down menu on the **Approve Document** dialog when the *Require a reason for approval setting* has been checked. The approval reason will be recorded in the history as part of the approval and can be viewed by right-clicking on the relevant entry when viewing a document. Reasons for approval (and rejection) are also contained within the **Document Status Detail** and **Document Status and Change Detail** reports.

- *Use ordered approval lists* - this option will be disabled unless *Document approval process* is checked. If checked, the document will require approval by users in the order specified. If unchecked, approvers may approve the document in any order.

8.1.3.7 Document issuing settings

Document Issuing workflow settings (System Manager module | Configuration menu | Workbench Configuration Centre | **Workflow Settings** page | **New Document Settings** (or **New Document Business Rule Settings** if Business rules are being used) are shown below.

- *Require formal issue process.* If checked, the document must be marked for issue then formally issued. But it can only be marked for issue when it reaches the appropriate stage - this will be either when it is a draft or after it has been fully approved, depending on the *Document approval process* setting (see above).

  If unchecked, the document can be issued at the appropriate time without having to mark it ready for issue. It may be issued either when it is a draft, or after it has been fully approved (when it will be issued automatically) depending on the *Document approval process* setting (see above).

- *Allow override of distribution options at issue* - this option is only available if the above option is checked. If checked, users may change the distribution option settings at the point of issuing the document. If unchecked, distribution options will be read-only on the **Issue** dialog.

8.1.3.8 Document distribution options settings

Distribution Options workflow settings (System Manager module **|** Configuration menu **|** Workbench Configuration Centre **| Workflow Settings** page **| New Document Settings** (or **New Document Business Rule Settings** if Business rules are being used) are shown below.

- *Notify users of new issue/reissue*. If checked, messages are sent to users when a document is issued/reissued and the distribution lists are changed. The messages sent depend upon whether *Acknowledgement required* (see below) is checked or not. If unchecked, no messages are sent.
- *Acknowledgement required* - this option can only be selected if the above option is checked. If checked, a *Please acknowledge document receipt* task will be sent to users on the distribution list when the document is issued or the distribution list is changed. If unchecked, a 'Document issued' notification is sent to users on the distribution list rather than a task.
- *Allow acknowledgement of receipt without viewing* - this option can only be selected if both the above options are checked. If checked, users may acknowledge receipt of a document without first viewing its contents. If unchecked, users must first view the contents of the document before being allowed to acknowledge its receipt.
- *Display warning if acknowledging receipt without viewing* - this option will be disabled unless the above option is checked. If checked, the **Acknowledge Receipt** dialog will provide a warning to the user if they try to acknowledge receipt of the document without first viewing. If unchecked, users may acknowledge receipt of the document without viewing it and will not receive a warning.
- *Allow change of document receipt on behalf of users with logins* If checked, allows the user (usually the administrator) to tick or untick document acknowledgement on behalf of all users (**Document Receipt** dialog). If unchecked, allows the user (usually the administrator) to tick or untick document acknowledgement only for those users without a login.
- *Retain previous issued versions*. If checked, users will have the option to retain previously issued documents when issuing a document. If unchecked, the option for retaining previously issued document versions will not be available. **NB**. This setting is removed for documents that are being reissued.

8.1.3.9 Document changes settings

Document Changes workflow settings (System Manager module **|** Configuration menu **|** Workbench Configuration Centre **| Workflow Settings** page **| New Document Settings** (or **New Document Business Rule Settings** if Business rules are being used) **|** Document Processing Flow are shown below.

- *Edit document content*. This setting will only be modifiable during document creation or when the status of the document is 'Issued'. This prevents problems with documents becoming uneditable during an edit or approval.

  If checked, the document content will be editable at appropriate times. If the *Change request approval process* is switched on (see below) then the document must have either 'New Draft' or 'Issued, New Draft' status in order to be edited. If the *Change request approval process* is not checked, then new draft and issued documents may be edited without change requests. Any issued document that is edited will immediately gain 'New Draft' status.

If unchecked, the document content cannot be edited and the document will never go into 'New Draft' status. It may start off requiring approval or issue (depending on other process flow settings), but once issued, its status will remain Issued. The raising of content CRQs against the document will be allowed, but users will be warned that the document will not be editable upon the CRQ being approved.

If a CRQ is fully approved against a document that has this setting unchecked, users will be informed that the CRQ has been fully approved but that the document cannot proceed due to the *Edit document content* setting. The document owner will be sent a notification - *Content CRQ approved, but document does not allow editing*.

If the setting is changed from unchecked to checked for an issued document, then the system will check if there are any approved content CRQs against the document. If there are, then the document status will automatically be changed to 'Issued, New Draft' and the appropriate users sent *Please edit document* tasks.

- *Can be edited by all users* - this option will be disabled unless the above option is checked. If checked, documents may be edited by all users with access to the document. If unchecked, documents may only be edited by the document owner and users on the Edit list.
- *Require content change requests*. If checked, documents will require change requests to allow their content to be changed after they have been issued. If unchecked, changes to the content of a document need not be preceded by the raising of a change request. **NB**. This only affects content changes, so even if it is unchecked, withdrawing a document will still require the raising and approval of a change request.
- *Warn user if they attempt to modify document content assigned to other actionees*. Defaults to off. If checked and a user with Edit rights to the document attempts to assign or 'mark as done' a change request that is not specifically assigned to them, a warning message will be displayed. This will also happen if the user attempts to edit a document that has CRQs but where they are not the actionee.

  If no actionee has been nominated, any user with access to the document may action the CRQ without the warning appearing.

  If unchecked, no warning will be given.
- *Require document attributes change requests*. If checked, a document must have an approved Document attributes change request raised against it before its attributes may be changed. If the *Change request approval process* setting (see below) is also checked, the change request should be approved by users on the Changes list (if one exists); if there is no Changes list then by users on the Approval list. The document attribute change(s) may then be actioned by the actionee (if one is assigned). If no actionee, then it is actioned by the final approver.

  If checked, and the *Change request approval process* setting (see below) is unchecked, document attribute change requests will be marked as 'Awaiting Action' straight away by anyone with access.

  If unchecked, no approval will be needed for changes to document attributes. Any user with appropriate access may edit document attributes (ie. the document owner, admin. and users on the Edit list).
- *Change request approval process*. If checked, new change requests must be approved by users on the Change list. If there is no Change list, then by users on the Approval list. If unchecked, new change requests will be marked as 'Approved' straight away.
- *Change request requires approval from all approvers* - this option will be disabled unless the above option is checked. If checked, all approvers need to approve the CRQ before it can be actioned. If unchecked, a single user from the Change list (or Approval list if a Change list does not exist) may approve the CRQ. **NB**. CRQs for withdrawal are governed by separate workflow settings - see Document withdrawal settings.

8.1.3.10 Document withdrawals settings

Document Withdrawals workflow settings are a sub-entry under the Document Changes workflow settings (System Manager module | Configuration menu | Workbench Configuration Centre | **Workflow Settings** page | **New Document Settings** (or **New Document Business Rule Settings** if Business rules are being used) | Document Processing Flow - and are shown below.

- *Withdraw document*. If checked, the document can be withdrawn. However, withdrawal will always require the raising (and approving if the *Change request approval process* setting is checked) of a withdrawal request. If unchecked, the document will not be available for withdrawal. The raising of withdrawal CRQs against the document will be allowed, but users will be warned that the document will not become ready for withdrawal upon the CRQ being approved.

  NB. It is not possible to change this setting for documents already awaiting withdrawal.

  If a CRQ is fully approved against a document that has this setting unchecked, users will be informed that the CRQ has been fully approved but that the document cannot proceed due to the *Withdraw document* setting. The document owner will be sent a notification *Withdraw CRQ approved, but document does not allow withdrawal*.

  If the setting is changed from unchecked to checked, then the system will check if there are any approved withdraw CRQs against the document. If there are, then the document status will automatically be changed to 'Awaiting Withdrawal'.

- *Withdrawals require approval from all approvers* - this option will be disabled unless the *Change request approval process* setting is checked. If checked, then change requests for withdrawing documents will require approval from all users on the Change list (if there is no Change list, then the Approval list) before the document can be withdrawn.

  If unchecked, change requests for withdrawing documents may be approved by a single user on the Change list (or Approval list if no Change list exists).

8.1.3.11 Document viewing options settings

Document Viewing Options workflow settings (System Manager module | Configuration menu | Workbench Configuration Centre | **Workflow Settings** page | **New Document Settings** (or **New Document Business Rule Settings** if Business rules are being used) | Document Processing Flow are shown below.

- *Allow all users to view the issued document* - this option is checked by default for all existing documents with a blank View list. If checked, the View list will be unmodifiable and the **Access** page will show the View List as ‘All can view’. If unchecked, the View list may be defined in the usual way.

- *Allow viewing of draft document* - this option is checked by default for all existing documents with a blank View list and will be disabled unless the above option is checked. If checked, all users may see the draft version of a document. If unchecked, then only the issued document may be viewed.

8.1.3.12 Reviews

The final group of configurable options controlling document workflow come under the heading **Reviews**. Unless you have been given Update rights to the settings, they will be Read-only.

To configure document processing flow options

1 From the **Configuration** menu in the System Manager module choose **Workbench**

Configuration Centre.

2 On the **Workflow Settings** page expand the list of entries under the **New Document Settings** (or **New Document Business Rule Settings**) heading (click on the actual entry or the + sign alongside). Alternatively check the *Expand all workflow settings* check box at the top of the dialog to see the complete list of entries.

3 Select the **Reviews** entry and expand further (unless already expanded).

4 When all the settings have been configured as required, click the **Apply** button to update and continue working in the dialog. Or click **OK** to save changes and close the dialog.

- *Allow change of responsible person when maintaining reviews*. The person responsible for the review of a document is set when creating the document. If this setting is selected, then responsibility for the review may be changed in the **Maintain Review** dialog. Click the **Apply** button to update any change**. NB**. The menu option, **Initiate Scheduled Reviews** may be used by Document Review Responsible persons who do not have full access rights to the required document.

- *Allow subset of review list when starting a review* - highlight the entry and the *Use this workflow setting?* check box will appear at the bottom of the dialog. If checked, when a review is started, you may use a subset of reviewers from the document Reviewers list (a pop-up dialog will list the individual reviewers and personnel groups, if any, and you may select any or all from the list). If unchecked, all nominated users/groups on the Reviewers list will be requested to review the document.

- *Combine the review close and complete functions* - highlight the entry and the *Use this workflow setting?* check box will appear at the bottom of the dialog. If checked, the Close and Complete phases for reviews will be combined and both can be processed in one single dialog. Appropriate messages will still be generated by the system and a final comment/ password required before the review can be completed. Reviews already 'In progress' will also have the Close and Complete stages combined, but reviews with 'Closed' status must be selected and completed manually.

- *View rights for review responses* - to set view rights, highlight the entry and the **Setting value** field will open at the bottom of the dialog. Select the required level from the drop-down menu.

  Blind - users will not be able to view other reviews or responses. This includes the list of Reviewers, their review response summary and status.

  Reviewers - only nominated users on the Reviewers list will be able to view all reviews and responses.

  Open - all with view rights to the document will be allowed to view all reviews & responses.

- *Require scheduled reviews* - if this option is selected, then the *Review period* and *Review period units* (below) are enabled and mandatory. Highlight the entry and the *Use this workflow setting?* check box will appear at the bottom of the dialog. If checked, the document will require scheduled reviews and the frequency must be set in the following two options. The **OK** and **Apply** buttons will not be enabled until the review period and units have been defined if the *Require scheduled reviews* option has been checked. If this setting remains unchecked then no reviews will be scheduled for the document.

- *Review period* - highlight the entry (the *Require scheduled reviews* option must be checked) and the bottom **Setting value** field will open. Enter the required number of units (eg. in conjunction with the following entry you may select a review period of 10 days or 3 months etc).

- *Review period units* - highlight the entry (the *Require scheduled reviews* option must be checked) and the **Setting value** field will open at the bottom of the dialog. Enter the type of unit from the drop-down menu (eg. days, weeks etc.)

- *Recalculate start date of scheduled review waiting start when period or units change* - this option, if checked, will force the system to recalculate automatically the start date of a document's review if the review period and / or units is changed; if unchecked, the review start date will not automatically be updated. The option will only be enabled if the *Require scheduled reviews* setting is checked.

- *Recalculate start date of scheduled review when a new version of the document is issued* - this option, if checked, will force the system to automatically recalculate the start date of a scheduled review that is 'Waiting start' for this document (and re-set the 'alarm') when a new version of the document is issued. The new scheduled review date will be based on the last issue date plus the review period. If unchecked, the review start date will not automatically be recalculated.

  The option will only be enabled if the *Require scheduled reviews* setting is checked - and cannot be selected if the setting below is also checked.

- *Calculate start date of scheduled review based on first issue date* gives control over when scheduled reviews should be started and can only be selected if the *Require scheduled reviews* setting is checked. The *Calculate start date...* setting is unchecked by default and can only be selected if the workflow setting above (*Recalculate start date of scheduled review when a new version of the document is issued)* is de-selected and vice-versa - a History entry is made when this setting is selected / de-selected.

  If the setting is checked, then when a review is completed, the next scheduled review date is calculated as the first issue date plus the review period. If this date has already passed, then a further review period will be added until a date in the future is reached.

  Any change to the review period units will automatically be applied to this setting.

  If re-issuing a document with a scheduled review date and this setting checked, the document's revision number must be increased on re-issue (as normal) and the document will keep the same scheduled review date against the updated revision number.

See also Document attributes Document processing flow Annotations

8.1.3.13 Annotations

Annotations is a separately licensed area allowing the annotation of documents in certain routines. As with all separately licensed elements in Workbench, if the element is not licensed then the associated workflow settings will not be present; neither will the various dialog buttons linked to annotation that otherwise will be seen in dialogs dealing with change requests, editing and reviews etc.

By configuring the new workflow settings (**System module | Workbench Configuration Centre | New Document Settings | Annotations**) the system can be set up to allow annotation of documents when raising change requests or during a review. Annotations may only be written/ viewed/ applied by users with the necessary access rights and permissions.

By default, annotations will be applied to PDF versions of the document (where documents have been issued to PDF) but can be applied to the original draft document in its 'native' form where configured appropriately.

The wording 'Annotated document' appears in the title of all documents that have been annotated, so avoiding confusion with the original document.

History entries will be made when an annotation workflow setting is changed.

The Annotation element will not be available through IVPro although relevant documents that have been issued to PDF will appear in that format where applicable.

Workflow settings controlling Annotations

- *Allow annotation of document when raising a change request*. The setting defaults to checked and allows users to annotate a copy of a document when raising a CRQ. The feature will not be available through IVPro. If more than one change request is assigned against an edit and both allow the copying of annotated documents to the draft document, then you will only be able to VIEW the annotated documents regardless of the configuration of any other workflow settings. To disallow annotation, uncheck the setting.

- *Annotate original format of document (eg. Word) if converted to PDF*. This setting is a 'child' of the above setting and is unchecked by default which means that if an annotated document has been converted to PDF then this will be the version that users will annotate when raising a CRQ. To allow users to annotate the document in its original format, the setting should be checked. The setting will be greyed out if the 'parent' setting *Allow annotation of document when raising a change request* is unchecked.

- *Allow annotation of document when reviewing*. The setting defaults to checked and allows users with necessary access rights and permissions to annotate and/or view annotated documents when reviewing and/or viewing document reviews. All reviewers annotate the same document.

- *Annotate original format of document (eg. Word) if converted to PDF*. This setting is a 'child' of the above setting and is unchecked by default which means that if an annotated document has been converted to PDF then this will be the version that users will annotate when reviewing. To allow users to annotate the document in its original format, the setting should be checked. The setting will be greyed out if the 'parent' setting *Allow annotation of document when reviewing* is unchecked.

- *Allow annotated document to replace draft document when being edited*. The setting defaults to unchecked. If checked and the document has not been edited since the annotations were made, then users are given the option to replace a draft document with an annotated one. However, if the annotated document's extension is different from the working draft then the replacing of the draft will not be allowed and a warning message will be displayed. Likewise, if there is more than one annotated document assigned to an edit this workflow setting will not be valid.

8.1.3.14 Document retention period

The number of years that a document must be retained is set by admin. in the Document Attributes section of the **New Document Settings** (or **New Document Business Rule Settings**).

However, if the *Allow document retention period to be changed* check box is checked in the **Workbench Configuration Centre | System Wide | Module Settings | Document Control settings**, admin. may allow this retention period to be over-ridden on an individual basis.

A second workflow setting, *Retain previous issued versions*, found under **New Document Settings** (or **New Document Business Rule Settings**) **| Document Processing Flow | Distribution Options**, if checked, automatically saves all previous versions of documents when issuing a new one. These previous versions may optionally be archived after the designated retention period has passed.

8.2 Tasks page

All internal task messages will always be sent. However, the system administrator (or any user with access) may decide which external Task messages and/or all Notification messages may be suppressed for a whole module, or for specific messages. Changes take effect the next time a user starts the relevant routine.

These options are configured on the **Tasks** and **Notifications** pages of the **Workbench Configuration Centre** and can be set up individually for Task messages and/or for Notifications.

NB. If a user does not have access to a specific menu item but is actually on an Access list to perform a certain task, then that user will still get the appropriate task message but can then only access the task via their Tasks bar.

Some tasks have different text but essentially the same action is required; these messages have an asterisk against them. If you highlight any of these, a message will be displayed at the bottom of the dialog - Text may vary depending on the context in which this is used.

For example, the task message *Please close/stop review** as listed on the **Tasks** page covers several different circumstances:-

- Review of document close date reached. Please close
- All reviewers have completed review of document. Please close review
- All reviewers have completed review of document. Please stop review

Configuring which external task messages should be sent

1 Select the **Configuration** menu in the System Manager module and choose **Workbench Configuration Centre** from its drop-down menu.

2 Select the **Tasks** page - the default is set for all tasks to be sent.

3 To send/suppress task messages for a whole module, highlight the required module. The *Send external tasks for this module* check box at the bottom of the dialog shows whether messages are currently being sent or not. If the check box is checked, all external tasks for that module will be sent; if unchecked, external messages will not be sent.

  To send/suppress specific task messages, double-click on the required module or click on the **+** sign alongside the relevant module. The complete list of task messages for the selected module will be shown - those messages with a tick alongside are currently being sent. Highlight the required message and de-select the check box at the bottom of the dialog marked *Send external tasks of this type?* if you don't want that type of message to be sent.

  To restart the sending of task messages for a module or of a specific type, highlight the module (or message) and tick the check box again.

  The *Send external tasks for this module* check box will be disabled if one or more message within that module is currently suppressed. It will be blank when a highlighted module has all its task messages suppressed.

4 When the settings are as you want them, click **Apply** to update and continue configuring other parts of the dialog. Clicking **OK** will close the dialog. Changes will take effect the next time the specific routine is started.

NB. The configuration of task messages in this way is for those sent externally only.

See also Configuring notifications

8.3 Notifications page

The system administrator may decide which Notifications (if any) should be sent - for a whole module, or for specific messages. Changes take effect the next time a user starts the relevant routine. These options are configured on the **Notifications** page of the Workbench configuration centre.

Some notifications may have different text but the message covers the same action; these notifications have an asterisk against them. If you highlight any of these, a message will be displayed at the bottom of the dialog saying - Text may vary depending on the context in which this is used.

An example is the Nonconformities notification - *Nonconformity assessed** - applicable for the following messages:-

- NCR has been accepted
- NCR has been rejected
- NCR has been deferred

To configure which notifications should be sent

1 Select the **Configuration** menu in the System Manager module and choose **Workbench Configuration Centre** from its drop-down menu.

2 Select the **Notifications** page - the default is set for all tasks and notifications to be sent.

3 To send/suppress notifications for a whole module, highlight the required module. The *Send notifications for this module* check box at the bottom of the dialog shows whether messages are currently being sent or not. If the check box is checked, all notifications (internally and externally) for that module will be sent; if unchecked, notifications will not be sent.

   To send/suppress specific notifications, double-click on the required module or click on the **+** sign alongside the relevant module. The complete list of notifications for the selected module will be shown - those messages with a tick alongside are currently being sent. Highlight the required message and de-select the check box at the bottom of the dialog marked *Send notifications of this type?* if you do not want these type of messages to be sent.

   To restart the sending of notifications for a module or of a specific type, highlight the module (or message) and tick the check box again.

   The *Send notifications for this module* check box will be disabled if one or more message within that module is currently suppressed. It will be blank when a highlighted module has all its notifications suppressed.

4 When the settings are as you want them, click **Apply** to update and continue configuring other parts of the dialog. Clicking **OK** will close the dialog. Changes will take effect the next time the specific routine is started.

See also Configuring external task messages

8.4 Module settings page

The Module Settings page of the **Workbench Configuration Centre** displays three separate options, each with its own Help topic. To access the Help, click on the small square buttons with a grey question mark (?) - displayed at the top right hand side of each separate option.

Document clipboard settings   Document display settings   User defined actions

8.4.1 Document clipboard settings

This option is controlled from the **Workbench Configuration Centre** (ie. by the system administrator). It enables you to copy selected document details out to the Windows Clipboard and paste them in to the document you are creating. You might use this option with editors such as WordPerfect 6 or AutoCAD, which cannot read '.ini' files and so make use of the 'qwcs.ini' and macro writing facilities.

To copy document fields into a new document using the Windows clipboard

1 From the **Configuration** menu in the System Manager module, choose **Workbench Configuration Centre**.

2 Select the **Module Settings** page. The **Document Clipboard Settings** option is on the left of the page.

3 Select the document fields you wish to copy to the clipboard. To highlight more than one field at a time, use the keyboard **Ctrl** button.

4 Check the *Enable copying to clipboard* box to activate settings for the next document(s) you create. These settings will be enabled for every new document until this check box is de-selected (ie. you may want to maintain the fields and the separator you have highlighted but not require the Clipboard option to be permanently on; turning the *Enable copying to clipboard option* on or off as required allows this).

5 Check the *Copy field names and values* if you wish to copy the field name into your document as well as the field content (eg. Revision Level - 6.0).

6 Click in the radio button of the required **Separator** (eg. Comma, Space, Return or Tab) to be used when information is copied to the clipboard.

7 Click on **Apply** to save selected settings.

You may then configure any of the other options on this page before clicking **OK**, which will close the dialog.

See also: Document display settings and User defined actions

8.4.2 Document display settings

Document Display Settings are originally selected by the system administrator on the **Module Settings** page of the **Workbench Configuration Centre**. The settings specify which fields will be displayed in Select Document display grids (Document Control module) and the order in which these fields will appear.

However, the system administrator may grant access to this option (**Access** menu), in which case the individual user may override the defaults and select which fields they want to appear on their own machine (and the order). However, for users who have checked the workflow setting *Use DocLists for document classification and filtering*, Document Display Settings will not be relevant and will therefore be disabled per database, per user (as the DocList workflow setting).

For users with appropriate access, the **Document Display Settings** option is found on the **Preferences** page of the **File | User Preferences** dialog.

Setting up display settings

The option is identical whether invoked by the system administrator in the System Manager module or by an individual user from the **File** menu. It consists of two lists, Fields available and Fields displayed, with central add (**>>**) and remove (**<<**) buttons which enable copying entries from one list to the other. The Display settings are set per database (where individual access is denied) or per user per database where individual access has been granted.

1 From the 'Fields available', list highlight the fields you want to appear in **Select Document** grids and click on the central **>>** button (or double-click). The chosen fields will move to the 'Fields displayed' list and will form the headings for the columns in all Select Document grids; they will range from left to right in the top to bottom order that they are selected.

To de-select 'Fields displayed', highlight and click on the central **<<** button (or double-click).

2 When the list is as you want it, click on the **Apply** button. An Information message will confirm that your preferences have been updated.

3 Configure any of the other preferences on the page before clicking **OK**, which closes the dialog.

See also: Document clipboard settings and User defined actions

8.4.3 User defined actions

The Customer Care, Document Control and Nonconformities modules each support a specific user-definable action (with a direct link to an editor) against appropriate accepted complaints and NCRs, and against all documents. For example, in the Customer Care module the action button could be used to automatically produce a letter of acknowledgement and apology; in the Nonconformities module it could be used to produce an incident form.

The user-defined action is set up on the **Module Settings** page of the **Workbench Configuration Centre**; the button that 'triggers' the action will then appear on relevant dialogs in the respective modules. When the button is triggered from any of these dialogs, the program writes all the requisite customer / complaint, document or nonconformity information to an easily accessible file and can optionally launch any application.

Setting up a user-defined action

This procedure is identical for either Customer Care, Document Control or Nonconformities.

1 From the **Configuration** menu in the System Manager module, choose **Workbench Configuration Centre**.

2 Select the **Module Settings** page. The **User-Defined Action** options are at bottom right.

3 Select the required **Module** from the drop-down menu.

4 Click in the *Enabled* check box to activate the UDA button when set up.

5 In the **Button label** field enter a name for the button.

6 In the **Button command** field, select (using the Search button) or enter the command to be executed when the button is clicked.

7 Click **Apply** when you have configured the shortcut exactly as you want it.

If you have checked the *Enabled* check box and wish to see where and how the action button will work, go to the relevant Customer Care, Document Control or Nonconformities menu and call up the **Process Corrective Actions** dialog (**Document Attributes** in Doc. Control).

Select any complaint / document / NCR and the labelled button will appear on the right hand side of the first page of the respective dialog (Complaint in Customer Care, NCR Details in Nonconformities). The Document Control button will appear at the bottom of any Document Attributes dialog, next to the Help button. The button will be labelled as per the **Button label** field. Click on it to make sure it takes you to the file / program / template you intended.

8 Adjust as necessary.

See also: Document clipboard settings and Document display settings

8.5 History page

History pages track all changes made to dialogs that they are attached to.

Right-clicking on certain entries will reveal further information, eg. CRQ / NCR rejection reasons.

Entries may be filtered using the **Filter** button at the top right of the page. The **Filter History Display** dialog is self-explanatory - selected items in the list will be displayed, those that are not highlighted will be not be shown.

A red 'warning' at the bottom of the History page will show whether the list has been filtered.

On the History page of the **Workbench Configuration Centre** there is a Print button alongside the **Filter** button that takes you to the Workbench configuration history report.

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