

Technical Account Manager MasterControl



## Top 10 Best Practices for MasterControl Documents

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- 1. InfoCard Type/Subtype Structure
- 2. Taxonomies & Custom Fields
- 3. Scheduled Packets
- 4. Administration of Packets
- 5. Administration of Pending Tasks
- 6. Document Stamping and Templates
- 7. Explorer Drag & Drop
- 8. Explorer Launching Packets



# InfoCard Types

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## InfoCard Types

- Helps organize your documents into a hierarchy
- Plan for scalability
- Don't overcomplicate

				Status: Draft	*Information
* Document Number	* Revision:	* Version	Lifecycle		Controlled Copies
RPT-0000001	123 A		CORP	*	Attachments & Link
* Title			* Vault		*Custom Fields
			CORP-dft	v	
			* Document InfoCard Type		
Notes			Report	×	
			* Subtype		
			CORP	*	
n File		Date Info	ormation		
e Name		Created	d Released		
		Effectiv	e Expires		
e Size					

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## InfoCard Types

- Take the time to plan the layout
- Use Custom Fields as SubTypes of SubTypes
- Plan, Plan, Plan

terControl Documents > /	Add/Edit Document InfoCard		0
ustom Fields			*Information
FIELD NAME	TYPE	VALUE	Controlled Copies
* Reports Type	Multi-Select Custom Data	Available Selected	Attachments & Links
		Design Transf Design Verrificat DVR-Design Verr FMEA/PFMEA IQR-installation Labeling Test Re Misc. Reports PQR-Performan	*Custom Fields
* Design Control	Custom Data		v
* Project Phase	Custom Data		×
* Department (Doc Owner)	Multi-Select Custom Data	Available Selected	
		Clinical Document Cont Engineering	

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# Taxonomies

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## Why Taxonomies?



- Works as a filter vs a saved search
- Less load on system
- Automatically adds the document to structure
- Careful planning can make it easier to locate documents

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## Why Taxonomies?

#### • Setting first level of hierarchy

MasterControl Documents > Organizer InfoCard



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## Why Taxonomies?

#### • Setting second level of hierarchy

MasterControl Documents > Organizer InfoCard

Exclusions Available Values Values to use in Taxonomy Available System Fields \* Selected Taxonomy Fields [NONE] Design Transfer Report Lifecycle Department (Doc Owner) Design Verification Test Results Status InfoCard Type DVR-Design Verification Test Report InfoCard Subtype FMEA / PFMEA Vault IQR-Installation Qualification Report Labeling Test Report Misc. Reports  $\odot$ PQR-Performance/Process Qualification Report Risk Analysis File Available Custom Fields RMR-Risk Management Report Purchased Assy/Kits Type Software Test Result Purchased Parts Type STC-Software Test Cases Reference Type STR-Software Test Report Region (Owner Location) UAT Results Requirement Type Usability Test Report RoHs SAP Base Unit Validation Results Sheet Metal VLR-Validation Report Software Type \* SOP Type



## Scheduled Packets

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## Scheduled Packets

• Packet Tasks may be set to recur at regular intervals. This is useful for tasks that need updating on a regular basis.

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asterControl Portal > Start Task					
tart, Stop Schedule, Edit and Delete Future Document Tasks					Forms
_				P 1000	Packets
tr			Previous	1 Next 10	Scheduled Forms
TASK NAME	SCHEDULED DATE	RECURRING FREQUENCY	DEPENDENT TASK	ACTIONS	Scheduled Packets
ZPQ-Task 1			ZPQ-Dependent Task	<b>8</b> ×	Scheduled Reports
ZPQ-Task 2	27 Sep 2016			4 3 ×	
ZPQ-Task 3				4 8 ×	
ZPQ-Task 4	27 Sep 2016	1 Weeks		4 3 ×	
wing 1 to 4 of 4 entries					



## Packet Type:

• Which Packet Type is to be associated with the Scheduled Packet?

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## Task Information:

- Task Name
- Task Number
- Route Name
- Select Originator
- Instructions

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## Scheduled Packet Task Action:



- Create New InfoCard
  - Select InfoCard Template<sup>1</sup>
- Revise Existing InfoCard<sup>2</sup>
  - Select Packet Contents

<sup>1</sup> Note: If you choose existing InfoCards, any template features such as Task Name, Route, and Instructions will be superseded by the information defined in the scheduled task you are creating.

<sup>2</sup> Note: If you choose Revise Existing InfoCard(s), the Frequency option will be disabled. This is so the previous version of an InfoCard will not continue to be revised after it has moved to a new version

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MY MASTERCONTROL		1 Q A	େ ← Chris Woodhead →	0 ¢
MasterControl Portal > Scheduled Task > New Scheduled Document Task				8
Task Information				
* Task Name	* Route Name			
ZPQ-Task 2	ZPQ-Route			~
* Task Number				
DCR-16-005				
Select Originator	Instructions			
Chris Woodhead (CWOODHEAD)				
Create New InfoCard Revise Existing InfoCard(s)				
* Select InfoCard Template				
Template				
Schedule Information				
Date Defined Task Defined Rule Defined				
* Dependent Task				
ZPQ-Dependent Task				~

2018 MASTERS SUMMIT

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# Document Stamping Document Templates

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No.	[InfoCard Title]			
	Doc#: [InfoCard Number]	Revision: [Rev.]	Effective Date: [Effective Date]	
	Author: [AUTHOR]	Pg. 1 of 1		

		mit	
- <b>6</b> 2	Doc#: SOP.0001	Revision: 01	Effective Date: 22 Oct 18
	Author: CWOODHEAD		Pg. 1 of 1

## **Document Stamping Fields:**



- Number
- Revision
- Title
- Author
- Owner
- Custom Field Values

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- Notes
- Vault
- Status

- Effective Date
- Release Date
- Expiration Date
- Created Date
- Next Review Date





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Navigation • • •			5	<u></u>	Restrict Editing 👻 🗙
Search document 🔎 -		[InfoCard Title]			This document is protected from unintentional editing.
Theodings Pages Mesuits	Doc#: [InfoCard Number]	Revision: [Rev.]	Effective Date: [Effective Date]		You may freely edit in this region.
2. Scope	Author: [AUTHOR]		Pg. 1 of 1		Show All Regions I Can Edit
3. Definitions 1. Purpose					
5. Responsibilities					
6. Procedure					
7. References					
8. Appendices (if applicable)					
4. Equipment					
5. Responsibilitie	'S				
6. Procedure					
7. References					
8. Appendices (if	applicable)			E CONTRACTOR OF	Stop Protection



# Explorer – Drag and Drop

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Create New Folder		×
Project X		
	Cancel	Save



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MD-Drawing		
Drag	g and drop files here or click t	o browse
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Drawing (2).docx	<b>12.1</b> KB	×
Drawing (3).docx	<b>12.1</b> KB	×
Drawing (4).docx	<b>12.1</b> KB	×
Drawing (5).docx	1 <b>2.1</b> KB	×



MD-Drawing Drawing (1).docx 12.1 KB	•
Drawing (1).docx 12.1 KB	
Drawing (2).docx 12.1 KB	
Drawing (3).docx 12.1 KB	
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	MD-01-0038 01 Drawing (3) + New		Draft InfoCard	습	٥
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# Explorer – Launching Packets

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	MD-01-0040 01 Drawing (5) + 📖		Draft InfoCard	☆	٥



ţ	Clear Selection Launch Task	
· · ·	Select Packet Type	×
~ 7	DCR Packet	×
	Cance	Create New Task



