Pediatric Blood and Marrow Transplant
Adult Blood and Marrow Transplant
Stem Cell Laboratory

DOCUMENT NUMBER: COMM-PAS-021 JA3

DOCUMENT TITLE:

Portal Configuration

DOCUMENT NOTES:

Document Information

Revision: 01	**Vault:** COMM-PAS-rel
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Date Information

Creation Date: 20 Jun 2025	**Release Date:** 01 Jul 2025
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Control Information

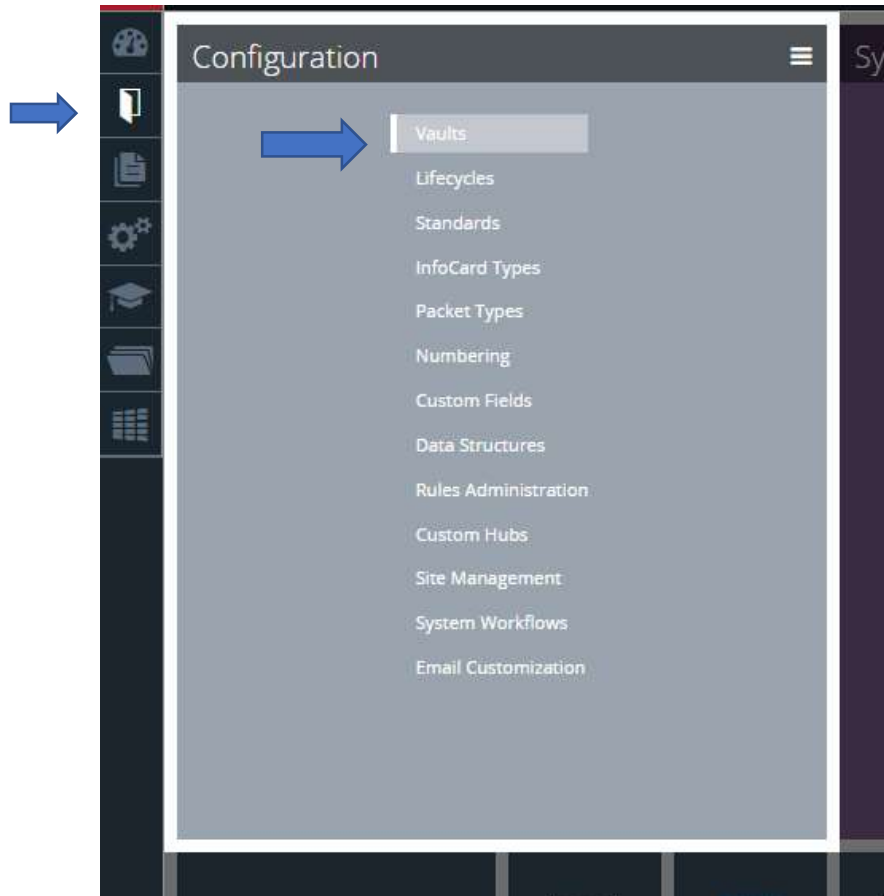|	
Author: MC363	**Owner:** MC363
Previous Number: None	**Change Number:** PAS-CCR-043

COMM-PAS-021 JA3
Portal Configuration

VAULTS

Use Vaults to control access to all system InfoCards; add, edit, or delete Vaults from the Configuration Tile of the MasterControl Portal.

1. Select PORTAL Hub on the left menu. In the Configuration Tile, select Vaults.

2. Select the new [+] button.

a. In the Edit Vault window, fill in the Vault Name and Vault Description. The Vault Name should end with "dft", "rel", or "arc". Each document type should have three (3) different vaults, one each for Draft, Release, and Archive. Each Vault Description should include the type of documents stored in the Vault.

Example 1 – Draft Vault

Example 2 – Release Vault

Example 3 – Archive Vault

b. After entering information in the fields, select the **Save** button in the lower-right corner.
c. If you search for the newly created vaults, they will not appear in the search results until the Vault Rights are added to <u>your</u> Role.
d. Once the Vault configuration is complete, Vault Rights **must** be assigned to other appropriate Role(s) to allow user access.

3. Click **SAVE** after the setup of each Vault.

LIFECYCLES

A Lifecycle represents the progression of an InfoCard from a draft status to an archived status when a newer revision of the InfoCard supersedes the older version.

1. Go to the Portal Hub and select Lifecycles in the Configuration Tile.
2. Select the new button (![+]) to create a new Lifecycle.

3. Select **Basic 3 Step** from the Form New Outline frame in the **Select Lifecycle Outline** window; then click **Continue**.
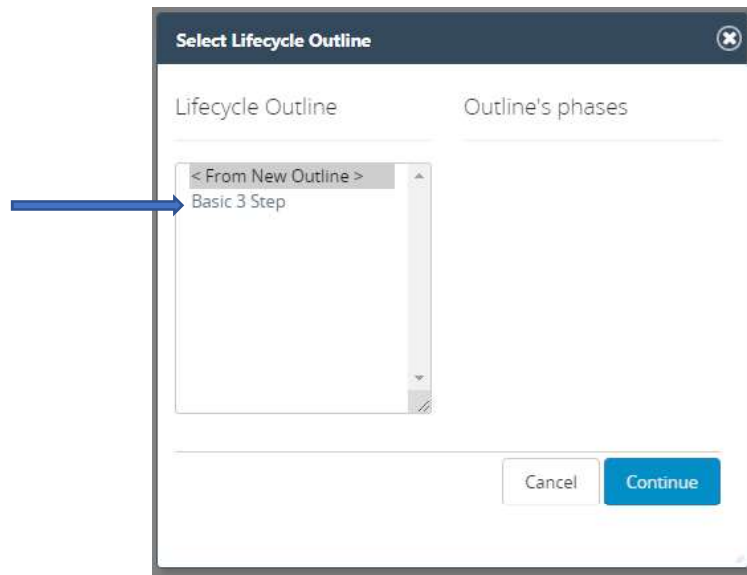
4. Enter information in the **Lifecycle Name**, **Lifecycle Description**, **Phase Name,** and **Phase Description** fields by selecting the **PHASE VAULT** on the drop-down menu. Select the PHASE VAULT for each PHASE NAME in the drop-down menus (see below).

5. Click the **Save** button.

INFOCARD TYPES

Create an InfoCard Type to categorize and standardize InfoCards that have the same purpose, including quality manuals, procedures, work instructions, drawings, and others. Define the characteristics of each InfoCard when creating a new InfoCard Type. Add, edit, export, or delete InfoCard Types, and create InfoCard Subtypes to further customize the categorization.

1. Go to the Portal Hub and select InfoCard Types in the Configuration Tile.
2. Select the new button (➕) and the **Add InfoCard Type** screen displays.
3. Select an **InfoCard Type** from the drop-down menu and enter an **InfoCard Type Name**.

* InfoCard Type Name

STCL MSPEC

4. Enter a description.

Description

STCL Material Specification

5. In the **Template Options** section, select a **Lifecycle** and make the Initial Revision 01.

Template Options

InfoCard

Lifecycle

PTHW COMP
QSU Change Control
Quality Agreements
RA
RA Change Control
Risk Management
STCL Change Control
STCL Mat Spec

Numbering Series

Initial Revision

01

6. In the **Task Instructions** field, enter "Please review and comment; sign-off accordingly."

Task Instructions

Please review and comment; sign-off accordingly.

7. Do **NOT** check the **Allow One Step Revision** box. The Allow One Step Revision option is checked by **DEFAULT**. This option allows for a quick revision of an InfoCard that is <u>NOT</u> on a Workflow. **NOTE**: It allows you to revise the document WITHOUT an approval step. **<u>Clear this checked option to remove the Revision option</u>** from the Revision drop-down menu on a Document InfoCard.

☐ Allow One Step Revision

8. In the **Retention Policy** section, select "File(s)" from the drop-down menu. **NOTE**: Our system is hosted by MasterControl. The Retention Policy can be used; however, all files selected for this option get stored on the MC server. We no longer have access to those files via the front-end, and no one can access these files until a request is submitted to MC Tech Support. Recommendation: do not use this feature.

9. Under **Review Policy** fill in as below. Also, you may search for and select Review Task Recipients (the Recipients are listed as **Roles**, so everyone in the chosen Role will receive the Review Task).

10. Click the **Save** button in the lower right.

NUMBERING

Use Numbering in MasterControl to set up standard numbering schemes for InfoCard (IC) Types. MasterControl automatically generates the next available IC number with its auto-numbering feature, which supports numbering schemes that include prefixes, suffixes, incremental numbers, incremental characters, and dates. You can use an automatically generated number or a manual numbering system. IC Types define numbering so you can specify or limit the numbering series available for specific IC Types.

1. Select PORTAL Hub on the left menu. In the Configuration Tile, select **Numbering**.
2. Select the new button (![+]) and the **Add/Edit Numbering Series** screen displays.
3. Enter information in the **Numbering Series Options** section as in the example below.

4. Select the InfoCard Type you will make this numbering series **Available to** from the drop-down menu.
5. Enter information in the **Numbering Series Pattern Options** section first by selecting **Text Section** in the drop-down menu under **Section Type**.
6. In the ***Text** field box, enter information as below and notice that what you type will populate in the blue box (section) at the top.

7. In the example below, a second section box has been added and populated as a text box. A third section box has been added but this time the **Section type** is Increment Section (chosen from the drop-down menu), "001" was entered as the **Increment Start** and the number 1 entered into the **Increment By** field. Hence, the first number in the series will be CCBB-ADMIN-001.

8. Click the **Test** button to use the **Pattern Test** to verify the numbering series. Each time the Test button is clicked, the Pattern Test will change automatically to the next sequential number.
9. Click **SAVE**.
10. This ends the Portal Configuration.

Signature Manifest

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Document Release

Name/Signature	Title	Date	Meaning/Reason
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