Pharma Documents Management System – Process Flow & User Permissions

# 📋 Process Flow

## 1. Document Creation

Initiator creates a new document (e.g., SOP, training doc). Enters metadata: title, department, description, type. Uploads document (PDF/DOCX) → System assigns version (v1.0) and status: Draft.

## 2. Document Submission for Review

Initiator submits document → status: Under Review. Reviewer(s) assigned (can be auto or manual). Email/notification triggered to assigned reviewers.

## 3. Review Phase

Reviewer can:  
- Approve → move to Pending Approval.  
- Send Back with Comments → back to Draft.  
History of reviewer actions saved.

## 4. Approval Phase

Approver sees reviewed document. Approver can:  
- Approve → status: Approved, version locked.  
- Reject → status: Draft, comments required.  
Final approval triggers archive to Approved Docs.

## 5. Versioning

Any change to an approved document triggers version increment (e.g., v2.0) → new review/approval cycle.

## 6. Audit Trail

All changes logged:  
- Who edited what/when.  
- Comments and status changes.  
API endpoint: /documents/{id}/history/

## 7. Expiry and Retention

Admin sets retention policy per doc type (e.g., 3 years). System marks expired docs and notifies admin.

# 👥 User Roles & Permissions

|  |  |
| --- | --- |
| Role | Permissions |
| Initiator | - Create, edit, delete own drafts - Submit for review |
| Reviewer | - View assigned documents - Approve or reject (with comments) |
| Approver | - Final approval rights - Can reject or approve reviewed documents |
| Admin | - Full access - User/role management - Set retention policies - Manage departments and templates |

# 🔒 Permission Summary Matrix

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Action | Initiator | Reviewer | Approver | Admin |
| Create new document | ✅ | ❌ | ❌ | ✅ |
| Edit draft | ✅ (own) | ❌ | ❌ | ✅ |
| Submit for review | ✅ | ❌ | ❌ | ✅ |
| Review document | ❌ | ✅ | ❌ | ✅ |
| Approve reviewed document | ❌ | ❌ | ✅ | ✅ |
| Reject and send back to initiator | ❌ | ✅ | ✅ | ✅ |
| View audit/history | ✅ (own) | ✅ | ✅ | ✅ |
| Manage users/roles | ❌ | ❌ | ❌ | ✅ |
| Archive/delete documents | ❌ | ❌ | ❌ | ✅ |