

Spec System Admin Guide

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1. Purpose / Scope

Purpose – This document is intended to describe how to perform administrative tasks in the spec system.

Scope – This document is focused on features that administrators can perform. See the Spec System User Guide for general spec viewing and routing.

2. Reference Documents


Spec System User Guide

3. Overview

Spec System is a light-weight solution for document control. It is a controlled system for releasing, revising and obsoleting documents.

Each numbered spec is revised and released independently. It will have one or more files attached to it. It must be signed by at least one person before it is made active.

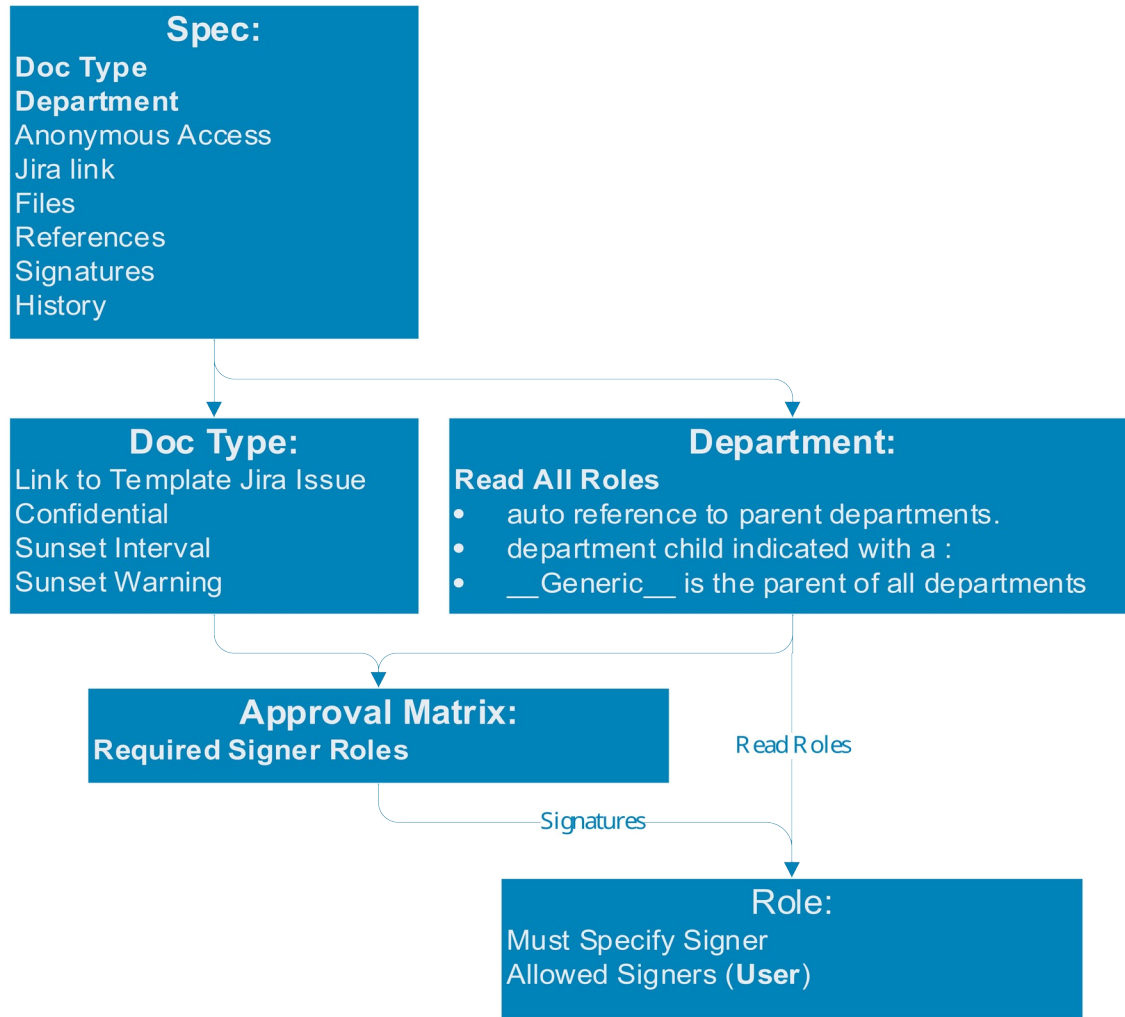
4. Login

For all actions beyond some limited reading of existing documents, you must be logged into the system. Click Login  LOGIN in the upper right corner to login.

For administrative functions, you must be in the *SPEC-Admin-Prod* AD group.

5. Structure

The diagram below shows the logical structure of the objects in the Spec System.



5.1 Spec

Spec is the item being created, approved and viewed. The workflow for spec processing is covered in the Spec System User Guide.

The Jira link on the spec is created when the spec is created. It is a copy of the Jira Template link on the Doc Type, if there was one. This is intended to be a way of tracking post approval activities. Such as, replacing paper copies of the spec upon release of a revision.

5.2 Doc Type

Document Types are for organizing specs. They can be things like WI for Work Instruction and SOP for Standard Operating Procedure.

Doc Types are a key to the Approval Matrix, below.

Doc Type has these attributes:

- Confidential.
 - o Any confidential document is readable only by the users indicated by the Department Read Roles, below.
- Jira Template
 - o This is copied when new specs are created of this type.
- Sunset Interval
 - o The amount of time since approval or extension when the spec will be automatically Obsolete
- Sunset Warning
 - o The amount of time before the sunset date this will show on the Sunset List.

Continue processing at above

5.3 Department

Department is the logical owner of the spec.

Departments are a logical hierarchy with a colon used to separate levels. The department __Generic__ is the parent of all departments.

So the department Operations:Line1 will be expanded to include the signature requirements and the read all list for the departments: __Generic__, Operations and Operations:Line1.

Department attribute:

- Read Roles
 - o The roles whose members may read confidential documents

5.4 Approval Matrix

The Approval Matrix is looked up by the combination of Doc Type and Department. It defines all the Roles (below) that must approve the spec for activation.

5.5 Role

Roles identify a function that is approving the spec.

Roles can have a list of users. When they do, only those users may be specified to sign for that role.

When Must Specify User is true (checked), a user from the list must be specified for the spec. When it is false, the person routing the spec does not have to specify a specific person. All the people on the role's user list will see the spec in their inbox (but will not get an email).

When a role is used as a read list on the department, the list of users will be those allowed to read confidential specs in that department.