Adding Customers to Trials

Part One

1. Email Welcome Letter *(user emails need to be included in the ticket. If not request the user email from the RAE or Partner)*
    a. Email the welcome letter to the customer. Make sure to CC the requesting representative on the email. (This is necessary as users will receive an email as soon as their email is entered into the system, and will not be able to access the links, causing confusion).

    Thank you for signing up for a Trial Site with MasterControl. It is our top-priority to set up the users and features that you have requested. In preparation for your use of the MasterControl Trial Site, you may receive a few emails informing you of pending tasks, including links to the site. You will not be able to access the site until we have completely custom configured your experience. Please be patient as we finish our preparations for you. Once we have completed the configuration, you will receive another email from us containing your Username, Password and E-signature.

    A word of caution; this is a shared site; please do not upload any proprietary information. This site will expire at the set date listed on the login page. We appreciate your patience and are excited for you to start using the MasterControl Trial Site.

    With Warm Regards,
    MasterControl Team

2. Navigate to the appropriate internal site for the month:
    a. For US

        https://xxx-trial.mastercontrol.com
        xxx = first three letters of month
        NOTE: If it is the 1st of the month or later, log into the next month's site

    b. For UK/EU

        https://euworkshop.mastercontrol.com
        NOTE: The EU Workshop (Trial) Site does not get refresh monthly. It is refreshed quarterly at most.

3. Log with you User ID and password given to you by the Solution Consultant, should be first initial/last name.
    a. User ID example: JDOE
    b. Password: 1
    c. E-Signature: 2

4. Creating an Identifier for the Customer
    a. Use 3 letter identifier created from the customer name.
    b. This Identifier will be used throughout the set-up of the customer trial site
    c. Always capitalize the 3-letter identifier
        NOTE: Do not use the following: EDM, GCP, GMP, GLP, MD or TMF, due to those being the identifiers for the JumpStarts.
    d. In the description fields use the full name of the customer
        i. Ex. MasterControl would be abbreviated to MC

e. Any time “Customer Identifier” is listed in this WI use 3 letter abbreviation
f. Any time “Customer Name” is used in the WI use the entire customer name

5. Creating InfoCard Type
    a. Navigate to Portal > Configuration > InfoCard Types > New
        i. InfoCard Type: Enter “Customer Identifier”
            1. Ensure to use 3 letters of the company name and that it is in all capitals.
        ii. Description: “Customer Name”
        iii. Save

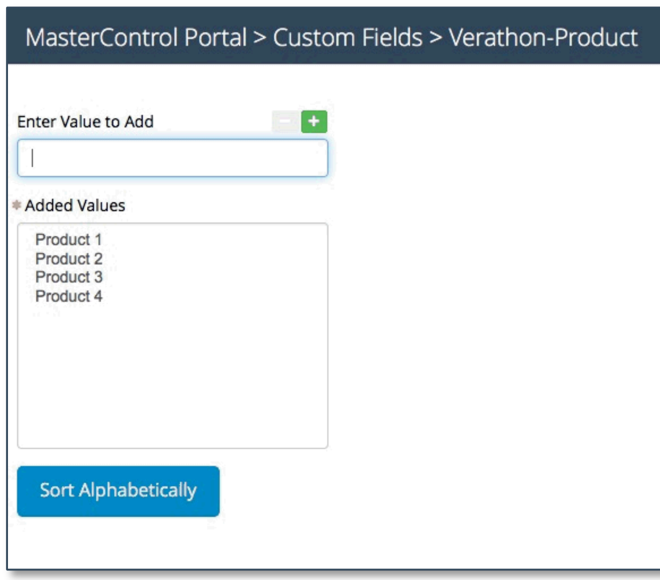
6. Creating a Lifecycle
    a. Navigate to Portal > Configuration > Lifecycles > New > Basic 3 Step > Continue
        i. Lifecycle Name: Enter “Company Identifier” Lifecycle
            1. Ex. MC Lifecycle
        ii. Lifecycle Description: Enter “Company Name” Lifecycle
            1. Ex. MasterControl Lifecycle
        iii. Select Auto-create Vaults
        i. Create Phase Vaults with “Company Identifier” followed by -dft, -rel, -arc to represent the different lifecycle stage.
            1. Ex. MC-dft, MC-rel, MC-arc
                a. Ensure to use 3 letters of the company name and that it is in all capitals, like the example. No spaces before or after the hyphen.
        ii. Save

7. Give Rights to ***SLS-SALESOPS*** (this is your role)
    a. Navigate to Portal > Users > Roles
        i. Click the Edit icon for the Administrators-All Role
        ii. Under Vaults find the abbreviated “Company Identifier” draft, release and archive vaults.
        iii. Highlight all three
        iv. Use the Double Chevron icon to move all the rights from the Available Vault Rights column to the Assigned Vault Rights column
        v. Save

8. Create Numbering
    a. Navigate to Portal > Configuration > Numbering > New
        i. In name field use 3 letter identifier plus ###
            1. Ex. MC - ###
                a. *Ensure the identifier is all capital letters*
        ii. In Description add “Customer Name” Number
            1. Ex. MasterControl Number
        iii. Click on “Available to” drop down menu, select “Selected InfoCard Types”
        iv. Highlight InfoCard **Type** created in step 5
        v. Under Numbering Series Pattern Options enter in the first text box the 3-letter identifier with a hyphen, no spaces before or after the hyphen
            1. Ex. MC-
        vi. Click “+ Add Selection” icon
        vii. Change to Section Type to Incrementing Section by clicking on the dropdown menu
        viii. Enter **001** in Increment Start field
        ix. Test Pattern
        x. Save

*NOTE: If you can test the numbering series, you can save.
Double check incrementing section if you cannot test/save.

9. Create Custom Fields
    a. Navigate to Portal > Configuration > Custom Fields > New
        i. Field Name: Enter “Company Name” - Product
        ii. Type
            1. Select Multi-Select Custom Data
        iii. Available InfoCard Types
            1. Select the InfoCard Type
            2. Use chevrons to move selected InfoCards to “Required InfoCard Types”
        iv. Save
        v. Locate the newly created Custom Field from the Custom Field list
        vi. Select the List icon under Actions
        vii. Enter Value to Add:
            1. Product names, if provided by the customer
            2. If none are provided, enter (ALL) the following product names
                a. Product 1
                b. Product 2
                c. Product 3
                d. Product 4
            3. Sort Alphabetically
            4. Save
               NOTE: This is to be a list of fictional products, so it is imperative to enter the list as noted above. DO NOT have only one entry of “Product”. The entry should look like the screenshot.



10. Create Role
    a. Navigate to Portal > User Management > Roles > New
        i. Role Name: “Company Name” Role
        ii. Role Users: click on green plus and add PlaceHolder.
        iii. Under vaults scroll to vault names created in step 5.
        iv. Multi-select all three vaults (hold Ctrl and make selections at the same time).
        v. Available Vault Right: Use multi-chevron icon to move all Available Vault Rights to Assigned Vault Rights.
        vi. Save

11. Create Users
    a. Navigate to Portal > User Management > Users > New
        i. User ID: Enter First Initial of First Name and full Last Name
            1. Jane Doe’s User ID would be JDOE

ii. First Name: Enter User's first name
iii. Last Name: Enter User's last name
iv. Supervisor: Search and select (check and add) Select Matt Smith from the list
v. E-mail Address: required
vi. Department: "Company Name"
vii. Login Password: 1
viii. Confirm Login Password: 1
ix. Electronic Signature: 2
x. Confirm Electronic Signature: 2
xi. Role Assignment:
NOTE: Please open ***Customer Roles, SLS-WI-0003*** within the trial site in Explorer Folder. Navigate to *Explorer > Sales Reps Work Instructions > SalesOps > Site Set-up labeled*. You will need this document open to understand which roles to assign the customer.
    1. Identify from Sales Op Ticket or email which modules the Customer has requested to utilize.
    2. Add the roles outlined in the ***Customer Roles, SLS-WI-0003*** Work Instruction. This Work Instruction outlines all the available roles for customers.
    3. Then add the roles that correspond with the Solution and Fountain Products requested.
        a. "Customer Name Role"
        b. To assign roles, double click or use chevron to move to Assigned Roles.
        c. Save
    NOTE: Each User ID can only be used once.
xii. Repeat for each user account that needs to be created

b. Navigate to PlaceHolder user.
    i. Remove all roles *except* PLACEHOLDER role.
    NOTE: You will receive a red notification at the top of the screen. Disregard this message. It is notifying you all the non-customer roles will remain in the placeholder role. This is ok.

12. Edit the InfoCard Type
    a. Navigate to Portal > Configuration > InfoCard Types
    b. Lifecycle: Assign Lifecycle created on step 6
        i. Select Edit icon next to the Type
        ii. Lifecycle: Assign Lifecycle created on step 6
        iii. Assign Number Series: Select Numbering Series created on step 8
        iv. Initial Revision: Enter **01**
        v. Packet Type: Select Basic Packet Type
        NOTE: This will give the customer 3 different routes to choose from when launching packets.
        vi. Auto-Create Course by selecting the radio button.
            1. Select "Create Course Immediately"
            2. Select "Use the InfoCard's Title as New Course's Name"
            3. Numbering Series: Select Course from the list
            4. Initial Revision: Enter **01**
            5. Course Template: Select Search icon
            6. Search Window will appear

a. Hint: Select the Basic tab at the top of the window
b. Search in the title for “Master”
7. Select Retrieve InfoCard with the course name “MasterControl Course Template”

vii. Save
NOTE: A box will appear asking if you want to recalculate > Click No

13. Create Document with the new InfoCard Type created on step 3
    a. Log in as one of the users you created on step 11. This will help you double check your work.
    b. Navigate to Documents > Documents > New
        1. Select “Company Identifier” InfoCard Type > Select None as the Subtype
        2. Click Continue
        3. Document Number, Revision, Vault, Lifecycle, Doc InfoCard Type should automatically load if set up correctly. If they did not, a step was missed with editing the InfoCard type on step12.
        4. Title: Welcome to MasterControl-“Company Identifier”
        5. Click on the Add Main File icon
            a. Click Browse
                i. Navigate to the file “Welcome to MasterControl.pdf”
                NOTE: This document can be found in the same Explorer folder as the SalesOps WI ***Explorer > Sales Reps Work Instructions > SalesOps***
                ii. Click Load File
        6. Click on the Custom Fields Tab
            a. Select “Product 1” and move it the Select column by clicking on the Right Arrow icon
        7. Click Save
        8. Click on Sign Off > Quick Approve
            a. Enter E-signature
            b. Submit

NOTE: The above steps help you double-check your work. If the InfoCard Number Revision, Lifecycle, InfoCard Type, InfoCard Subtype and Custom Fields are required, you did the configuration correctly. If not, you will need to double-check your work before moving forward.

Part Two

Log back in as yourself to complete the following steps:

1. Create InfoCard Subtype
    a. Navigate to Portal > Configuration > InfoCard Types. Locate Company InfoCard Type *(TIP: Search>Basic>InfoCard Type>* “Customer Identifier”)
        i. Create a new InfoCard Subtype by selecting the New InfoCard Subtype icon under Actions
        ii. Enter the subtype (Do not abbreviate the Subtype)
            1. “Customer Identifier” - Policy
            2. “Company Identifier” - Procedure
            3. “Company Identifier” - Specification
            4. “Company Identifier” - Work Instructions
            NOTE: If subtypes are provided by the Customer, use these values to create subtypes
        iii. Ensure to use 3 letters of the company name and that it is in all capitals.

      i. Auto-Create Course by selecting the radio button.
         1. Select "Create Course Immediately"
         2. Select "Use the InfoCard's Title as New Course's Name"
         3. Numbering Series: Select Course from the list
         4. Initial Revision: Enter **01**
         5. Course Template: Select Search icon
         6. Search Window will appear
            a. Hint: Select the Basic tab at the top of the window
            b. Search in the title for "Customer Name"
         7. Select Retrieve InfoCard with the course name "[Company Name] - Welcome to MasterControl"
      ii. Save
         NOTE: A box will appear asking if you want to recalculate > Click No
      iv. **Repeat for every Subtype**.

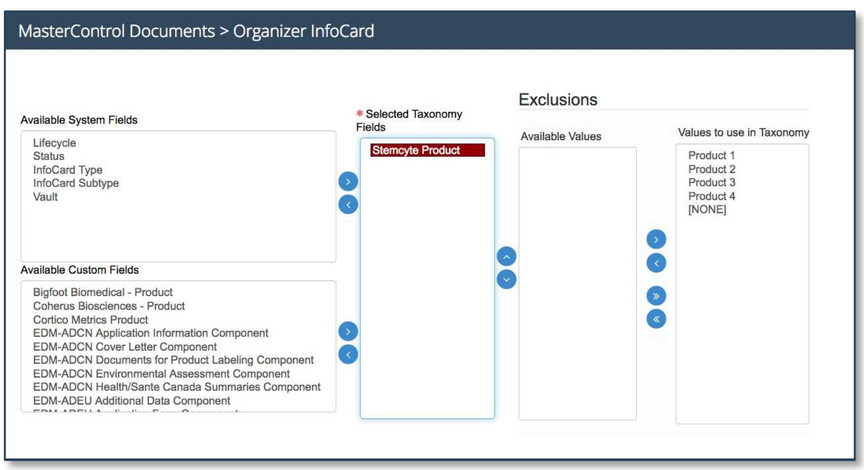
2. Release Course
   a. Navigate to Training >Course >Search.
      i. Find the Course named "[Customer Name] - Welcome to MasterControl" Click on the course name
         1. Sign off > Quick Approve
            a. Enter E-sig
            b. Submit

3. Create Job Codes
   a. Navigate to Training > Job Codes > New. Select Default and click continue.
   b. Job Code Name: "Company Name"
   c. Job Code Description: "Company Name" Job Code
      i. Click the Curriculum icon
      ii. Search for the courses with the "Company Name" and check the boxes
      iii. Search for "Welcome to MasterControl" and click the box
         1. Save
         2. Make sure to add Course
      iv. Competency: Perform Alone
         1. Save
            NOTE: You should see one course selected under curriculum
         2. Trainees: Move "Company Name" Role to the Select Trainees column
            a. Save
         3. Sign off > Quick Approve
            a. Enter E-sig
            b. Submit

4. Release Trainee InfoCards
   a. Navigate to Training > Trainees
      i. Locate the Trainee InfoCards created for each User added to the system above.
      ii. Open each Trainee InfoCard.
      iii. Sign Off: Navigate to Sign Off > Quick Approve
         1. Enter E-signature
         2. Submit
      iv. Click on Training Gates tab
         1. Click on "Launch all available training for this trainee"

        a. You should see 2 courses. If not navigate to Training > Job Code Status. Click open, click on the company name. Verify that all users in the company have 2 trainings listed.
    v. Repeat for each user account created above
    NOTE: If this is not performed, the user will not receive any training tasks.

5. Creating an Organizer
    a. Navigate to Documents > Organizers
        i. Click New
            1. Select Taxonomy and continue
            2. Click on the New Number icon and select "Organizer Taxonomy Number" from the drop down.
                a. Click Select
            3. Revision Number enter 01
            4. Title: "Company Name" Organizer
            5. Lifecycle: "Company Identifier" Lifecycle
            NOTE: The Vault will auto fill.
            6. Click on the Taxonomy tab
                a. Click on "[Company Name] Product" under the Available Custom Fields. Once you click on this, columns will appear to the right.
                    1. Once the above steps are completed it should look similar to this:



                    2. Click Save
            7. Sign Off: Navigate to Sign Off > Quick Approve
                a. Enter E-signature
                b. Submit

Send to Reps

1. Notify the requester that the site has been set up. In the ticket system request. Give them the following links

    Trial Site Links
    Site: https://XXX-trial.mastercontrol.com
    Mobile: https://XXX-trial.mastercontrol.com/mobile
    NOTE: The XXX would be replaced with the correct month abbreviation.

2. Give them the information for each user
   Username:
   Password: 1
   E-Signature: 2

3. Follow up on the Welcome Letter by notifying the partner or requester that the users have received a standard Welcome Letter. When the requester is ready for the user to access the trial site the requester is to send the user their log in information. Receiving this information will signal that the configuration of the trail site is complete, and the user will now be able to access the links included in the training notification email.

4. Attach a copy of the welcome letter.

5. Please ensure you give the customer the correct URLs for the month they have been entered into.