
Using Suite Data Editor to Change Owner/FAA en masse

01/06/2014

1. Purpose and Scope

This instruction describes how to use the Suite Data Editor functionality in Document Manager to apply changes to one or many documents simultaneously.

2. Definitions

Document Owner	The person responsible for the content of a document and its subsequent periodic reviews.
FAA	The Final Approval Authority of a document or process.

3. Responsibilities

FAA, DOC OWNER	Final Approval Authority, Document Owner
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4. Authority

FAA, DOC OWNER	Final Approval Authority, Document Owner
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5. Process Steps

1. Access Document Manager

Only the MASTER user account has access to use this functionality. Users with Master privilege need not apply as this is restricted to ONLY the MASTER user account.

PLEASE carefully read the warnings and understand that this functionality is very powerful. If the incorrect documents are selected when applying a change, there is no undo feature and your only recourse would be to restore your system from an earlier backup of the Suite system so please backup your Suite share and database.

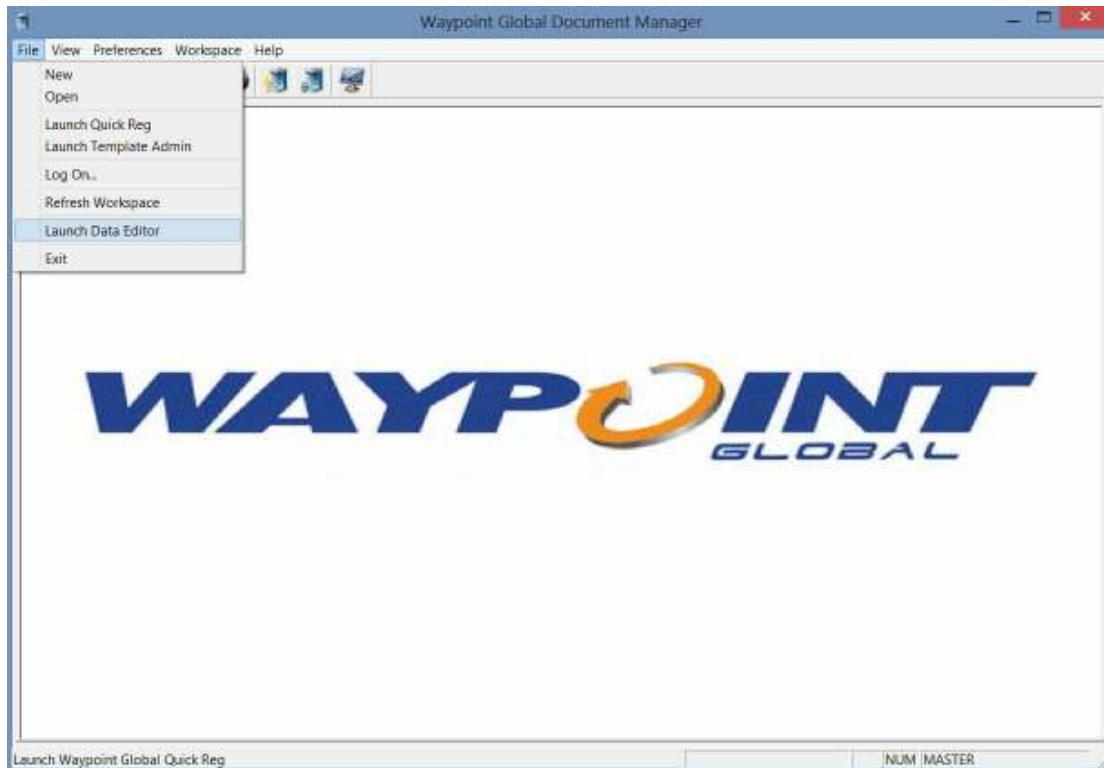
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Process Steps (Continued)

2. Launch Data Editor

Suite Data Editor can only be launched from the File menu option in Document Manager by the MASTER user.



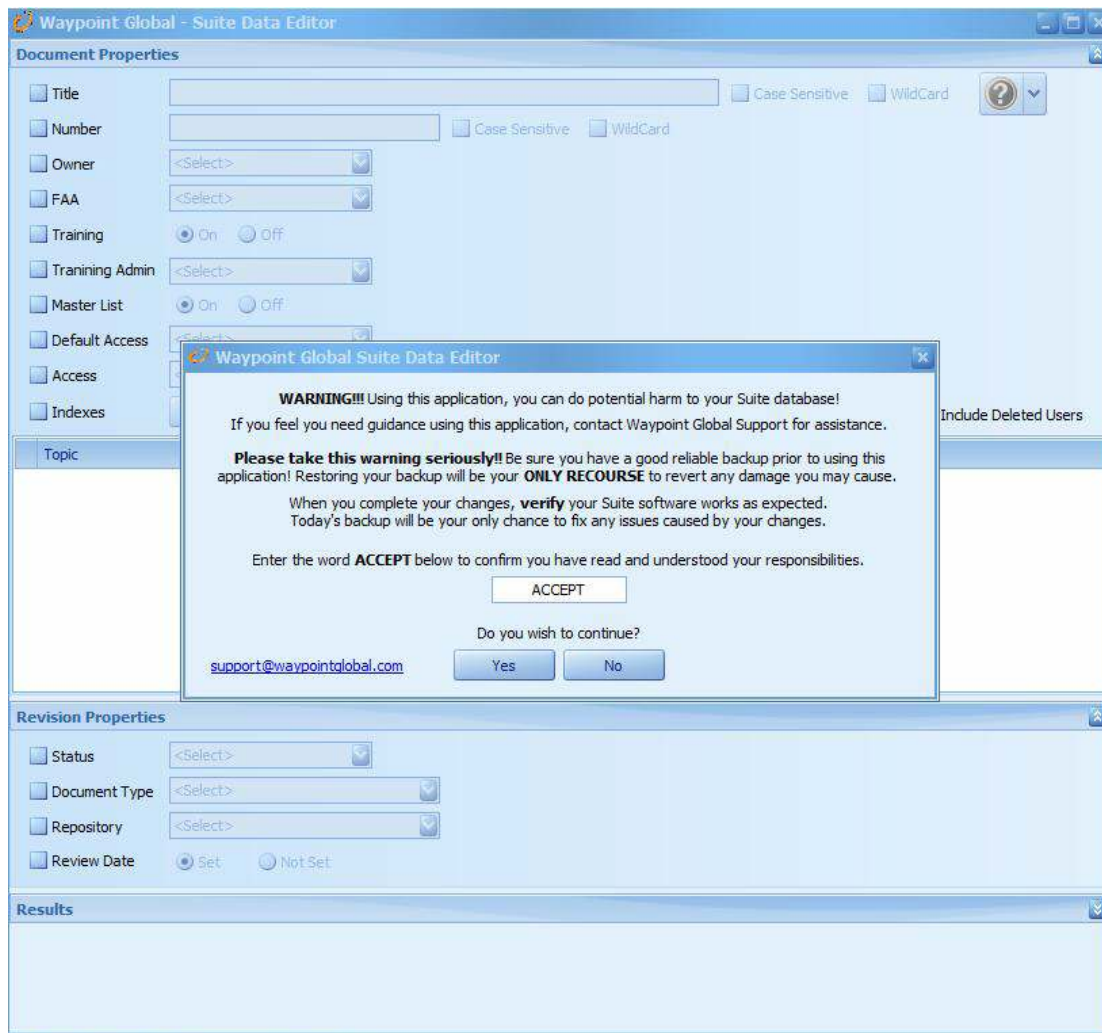
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Process Steps (Continued)

3. Read warnings and agree to terms

To acknowledge the cautions and continue, you must type ACCEPT in all capital letters.



4. Query strategy

The dialog window is divided into three sections; Document Properties, Revision Properties and Results. We will start with Document Properties. Document Properties apply to EVERY revision of a document regardless of any revision level properties such as status. Our query will search for all documents that have properties that exactly MATCH our query input. If multiple fields are searched, ALL fields must match or no results will be returned. When desiring to change the document Owner and Final Approval Authority from one user to another, it may be wise to search for the Owner separately from the Final Approval Authority(FAA) in case the User may be the owner of documents for which they are not the FAA and vice-versa. If you search for both together, only documents that the User is both will be returned.

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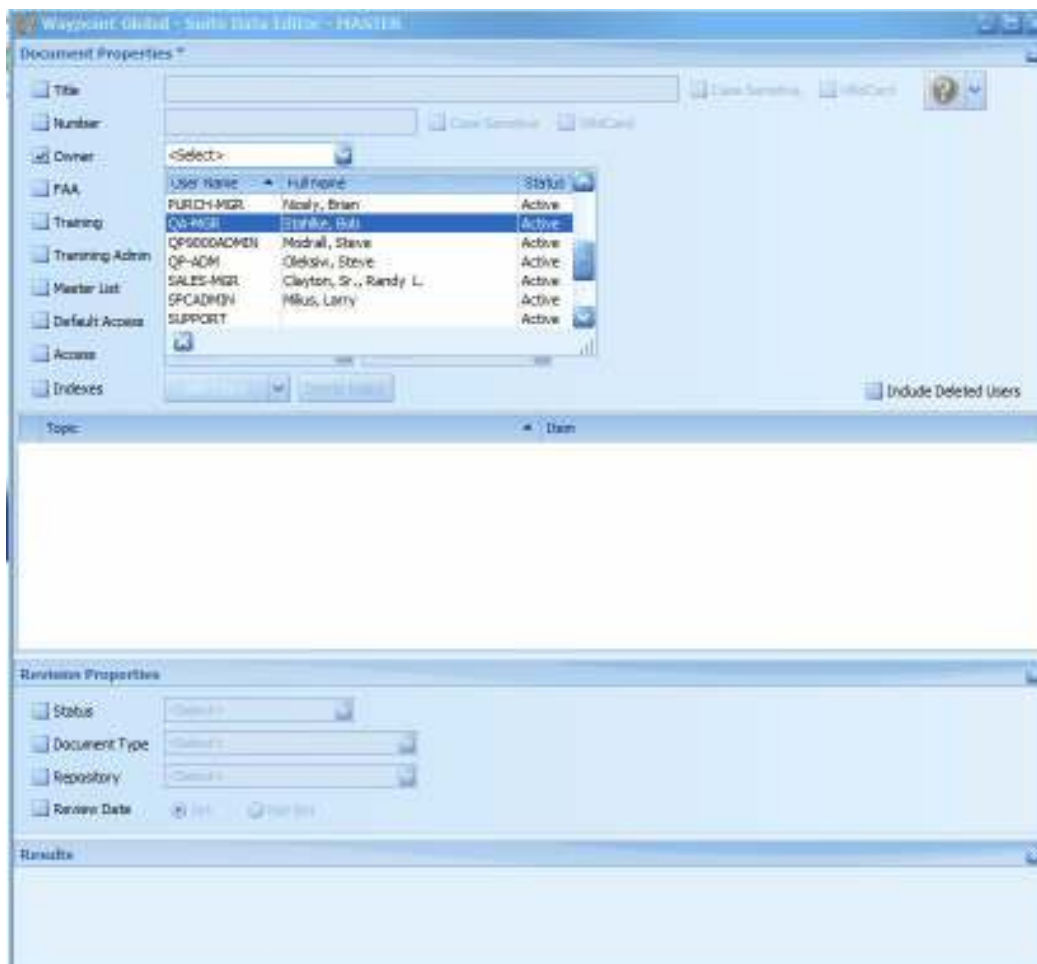
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Process Steps (Continued)

4.1. Start building your query

To build your query to search for documents you wish to modify, put a check mark in the box preceding the field(s) you wish search. Since this instruction is about changing document ownership, we will put a check mark in the box beside Owner. This enables the drop-down window and displays all Users in the system. Select your target User. Changing this type of information will not impact any of the report results available from module or Desktop Reports such as Approval History or Revision History reports.

Next we will move on to the Revision Properties. Either double-click on the Revision Property bar or click on the double arrows on the far right to shift focus to this section. Selected revision level properties are available to query, such as Status, Document Type, Repository or Review Date. None of this really applies to what we are trying to change so we will move to the next step.



4.2. Perform the query

Double-click the Results bar and select the Query button.

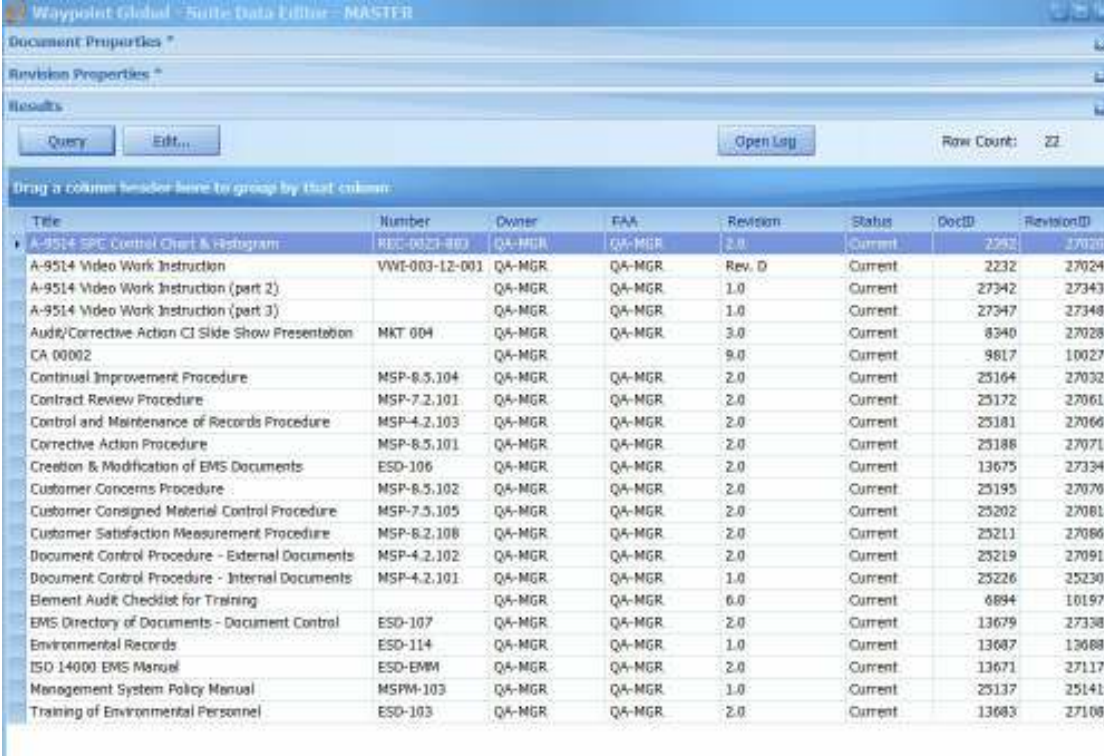
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Process Steps (Continued)

5. Review query results

The results of the query are displayed and can be scanned to ensure your query returned the desired results.



The screenshot shows the Suite Data Editor interface with a table of query results. The table has columns for Title, Number, Owner, FAA, Revision, Status, DocID, and RevisionID. The results list various documents such as SPC Control Chart & Histogram, Video Work Instructions, and various procedures, all with Owner and FAA set to QA-MGR.

Title	Number	Owner	FAA	Revision	Status	DocID	RevisionID
A-9514 SPC Control Chart & Histogram	REC-002F-883	QA-MGR	QA-MGR	2.0	Current	2592	27020
A-9514 Video Work Instruction	VWI-003-12-001	QA-MGR	QA-MGR	Rev. D	Current	2232	27024
A-9514 Video Work Instruction (part 2)		QA-MGR	QA-MGR	1.0	Current	27342	27343
A-9514 Video Work Instruction (part 3)		QA-MGR	QA-MGR	1.0	Current	27347	27348
Audit/Corrective Action CI Slide Show Presentation	MKT 004	QA-MGR	QA-MGR	3.0	Current	8340	27028
CA 00002		QA-MGR		9.0	Current	9817	10027
Continual Improvement Procedure	MSP-8.5.104	QA-MGR	QA-MGR	2.0	Current	25164	27032
Contract Review Procedure	MSP-7.2.101	QA-MGR	QA-MGR	2.0	Current	25172	27061
Control and Maintenance of Records Procedure	MSP-4.2.103	QA-MGR	QA-MGR	2.0	Current	25181	27066
Corrective Action Procedure	MSP-8.5.101	QA-MGR	QA-MGR	2.0	Current	25188	27071
Creation & Modification of EMS Documents	ESD-106	QA-MGR	QA-MGR	2.0	Current	13675	27334
Customer Concerns Procedure	MSP-8.5.102	QA-MGR	QA-MGR	2.0	Current	25195	27076
Customer Consigned Material Control Procedure	MSP-7.5.105	QA-MGR	QA-MGR	2.0	Current	25202	27081
Customer Satisfaction Measurement Procedure	MSP-8.2.108	QA-MGR	QA-MGR	2.0	Current	25211	27086
Document Control Procedure - External Documents	MSP-4.2.102	QA-MGR	QA-MGR	2.0	Current	25219	27091
Document Control Procedure - Internal Documents	MSP-4.2.101	QA-MGR	QA-MGR	1.0	Current	25226	25230
Element Audit Checklist for Training		QA-MGR	QA-MGR	6.0	Current	6894	10197
EMS Directory of Documents - Document Control	ESD-107	QA-MGR	QA-MGR	2.0	Current	13679	27338
Environmental Records	ESD-114	QA-MGR	QA-MGR	1.0	Current	13687	13688
ISO 14000 EMS Manual	ESD-EMM	QA-MGR	QA-MGR	2.0	Current	13671	27117
Management System Policy Manual	MSPM-103	QA-MGR	QA-MGR	1.0	Current	25137	25141
Training of Environmental Personnel	ESD-103	QA-MGR	QA-MGR	2.0	Current	13683	27108

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6. Select information to change

Waypoint Global does NOT recommend or encourage any documents created in Audit Manager or Corrective Action modules be changed using this functionality. Documents created in those modules should be edited ONLY using those modules.

You can select from one to many to all of the returned documents for which you want to apply the change(s). Selected document titles will remain highlighted. Once you have selected the target documents, select the Edit button.

A new dialog window opens which you can select the new data just as we did while building the query. To enable a field for selection, place a check mark in the box preceding the field and then select the data from the drop-down window. When finished, select Apply. If you need to go back or change your mind for any reason, you can select Close.

ID	RevisionID
2392	27020
2232	27024
27342	27343
27347	27348
8340	27028
9817	10027
25164	27032
25172	27061
25181	27066
25188	27071
13675	27334
25195	27076
25202	27081
25211	27086
25219	27091
25226	25230
6894	10197
13679	27338
13687	13688
13671	27117
25137	25141
13683	27108

7. These changes have been applied

The changes have been applied. Now you are ready to edit any additional changes for the selected documents, if any.

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Process Steps (Continued)

8. Assign proper access

If you are changing the ownership or final approval authority to another user, you will probably want to ensure they have proper access to the document. They may already have access or they may not have any so this is a good time to just assign them the necessary access to the document. The same documents are still selected so click on the radio button in front of Add Access, select the user you just changed to in the previous step, select the desired level of access and then Apply.

The screenshot shows the 'Waypoint Global - Suite Data Editor - MASTER' application. The 'Edit Properties' dialog box is open, displaying various configuration options. The 'Add Access' section is active, showing 'PLANT-MGR' selected for the user and 'Configure/Delete' for the access level. A dropdown menu is open, listing options: None, View, View/Print, Edit, Configure, and Configure/Delete (highlighted). The 'Force Admin Change' checkbox is checked. The background shows a 'Results' table with a 'Count: 8' and a list of RevisionIDs.

ID	RevisionID
25348	
25357	
25365	
25372	
25386	
25379	
25395	
27547	

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Process Steps (Continued)

9. Process is complete

The changes have been applied. Now you are ready to build any additional queries for other changes, if any.

