

Document Repository now uses Module Permissions

Overview

Historically, the ability for users to create and work with Document Repository records not controlled by Document Change Notices (DOCCN) has been managed through the use of Document Control Groups (DCG). Moving forward, these types of repository records will be managed through permissions derived from a new module called DOCUMENT REPOSITORY.

Details

Some Brief History

- Valid Document Types tied to the DOCMaster table (i.e., document types that reside in CMPro's Document Repository) have been managed in one of three basic ways: 1) through the use of the DOCCN; 2) through the use of DCGs; and 3) not under the control of either a DOCCN or a DCG.
- Only administrators could create DCGs, and only administrators or users with admin privileges could make changes to existing DCGs.
- Specific permissions were granted at the individual user level.

This older approach to document management has now been surpassed with the creation of the DOCUMENT REPOSITORY module to handle these same types of document-related permissions. Working with document records that have Control Groups (CG) assigned will now follow the same Role / Control Group / Module approach that is standard across many other modules within CMPro.

Highlights of this Change

- For document types that **Require Control Group for Creation / Revision**, the CGs that can be selected when creating a Document Repository record of that type will only be those that have their permissions derived through the DOCUMENT REPOSITORY module.

- Descriptions of these permissions can be seen on the *Module Permission By Control Group* screen by:
 - Selecting the DOCUMENT REPOSITORY module from the list in the left pane.
 - Expanding the *Applicable Permissions* section in the right pane.
- The **Document Control Group** label previously visible on the *Document Repository Detail* screen is now labeled **Control Group** with a text below that says **For delegating management of this record**.

Migration of Existing Document Control Group to New Module Structure

To capture all existing DCG data and move it over to the new module-based permissions structure, a script was developed that includes:

- Creating a new Role and Control Group (CG) based on existing DCGs. Each created CG has a prefix of "DR". If any duplicates were encountered during this process, the CG created has also been identified with a "- #" added as a suffix to its name.
- The newly created Roles have been populated with the users from the referenced DCG.
- Applicable permissions have been assigned to the Role using the DOCUMENT REPOSITORY module as the basis for those permissions.

DOCCN-Controlled Document Types

The processes already in place regarding the creation and revision of document types that require the control of a DOCCN were unaffected by this new functionality. No changes to existing route settings is necessary.

Document Control Group Screens

The Document Control Group screens will remain in place for a short while. Once PSA is assured that existing DCG data from all sites has migrated over and has been integrated into the new Roles and Control Groups, these screens will be obsoleted.

Availability

The changes described herein will be available with C-BN-0117.