

Routing and Approval

Feature in Xspec® Versions 3.1 and 4.0

Xspec enables your company to send specifications and other documents to users who check the accuracy of the information. All new specifications start out at the *Under Development* status. Once a document has been thoroughly reviewed, your company can assign a higher status level to the document. Once the document is ready to be reviewed, you use the Xspec Routing and Approval module. This module sends the specification to a list of users or groups for their approval.

How it Works!!!

There are two ways a document can be routed - broadcast and sequential. In a broadcast routing cycle (figure 1), the document being sent for review reaches all reviewers at once. If any reviewer disapproves the document, it is removed from all other reviewers and sent back to the route initiator (user that originally sent the document to be reviewed). However, if the document is approved by all users, then the document reaches a higher status and is used by manufacturing facilities.

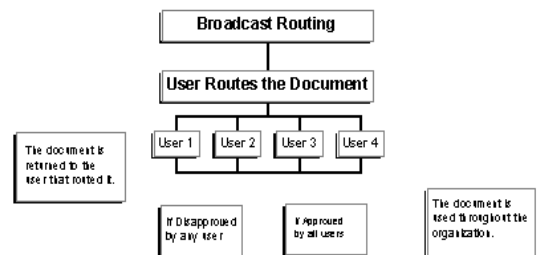


Figure 1

In a sequential routing cycle (figure 2), the reviewers receive the document one at a time. The document must pass through Reviewer 1 before moving on to Reviewer 2. Reviewer 2 will not know a document has been routed to him/her until it passes through Reviewer 1. However, once it passes through Reviewer 1, that reviewer does not need to re-approve it. If Reviewer 2 disapproves the document, the next time the document is routed it will go directly to Reviewer 2.

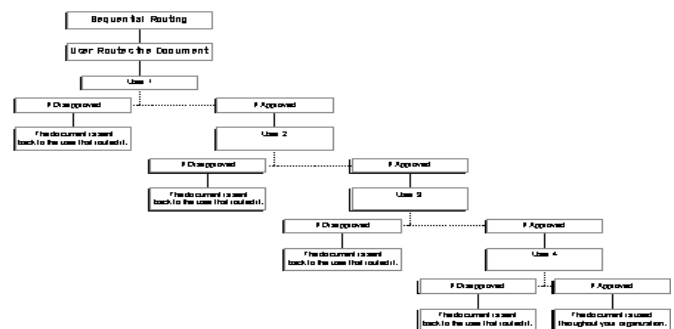


Figure 2

The first step in the routing and approval module is to have a security administrator design the approval groups. An approval group consists of employees, who may not necessarily be in the same department, that review documents. For example, the Bakery Ingredient Specs approval group may contain two employees from the Microbiology department, one from the Regulatory department, and one from the Product Development department. You can add, change, and delete routing groups with the Approval Groups screen (figure 3).

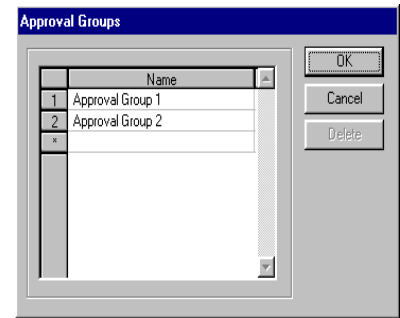


Figure 3

After creating all the approval groups, you create the routing slips. Routing slips contain the list of approval groups or users who review documents. Your company has the option of enabling all users to create routing slips, or only system administrators. You name the routing slip in the Edit Routing Slip screen (figure 4), and determine which specification type, business unit, and category the routing slip can be used for. You also decide if the routing slip is private (used for personal reasons) or public (used by everyone). Then you add the list of groups and users who can review the documents on the Routing Slip screen (figure 5). You can determine if the routing will be a broadcast routing (all reviewers receive the document at once) or a sequential routing (Reviewer 1 receives the document before Reviewer 2).

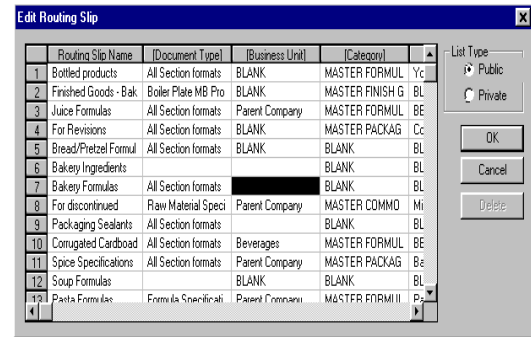


Figure 4

Once a document is ready for review, you choose *Actions/Route Document* from the Xspec menu bar. The system displays the

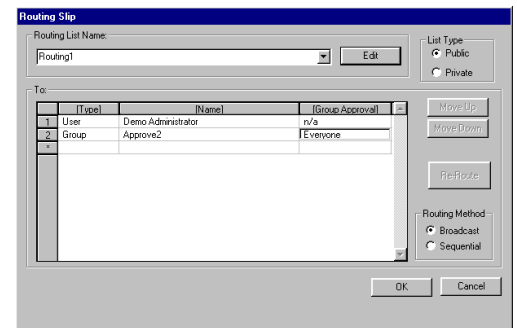
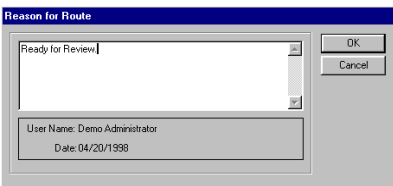


Figure 5



6). Enter the reason why you are routing the document and click on the *OK* button. The system sends the document to the list of users.

Whenever you route a document, you can view the status of the review. Open the document and choose *Utilities/Routing Status* from the Xspec menu bar. The system displays the Routing Status screen (figure 7), which lists the users that have reviewed the document, their comments, and the users that are next to receive the document.

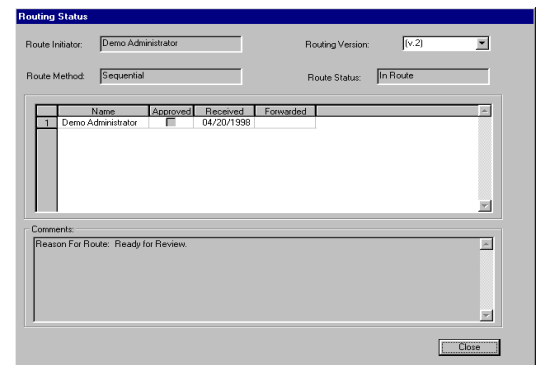


Figure 7

Whenever a document has been routed to you, Xspec sends you a message you as soon as you log on to the system. To open your document queue, choose *Utilities/Document Queue* from the Xspec menu bar. The system displays a list of documents that have been sent to you. Open a document by double-clicking on it. Once you review the document, choose *Utilities/Routing and Approval/Approve/Reject*. The system displays the Approve Document screen (figure 7). Choose whether you are approving or disapproving the document, and enter why you are doing so. The system records your comments with the history of the document.

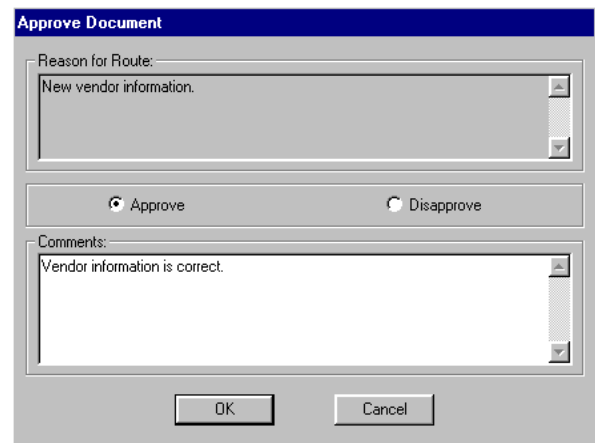


Figure 7

What s New in Xspec 4.0?

There are several changes in Xspec 4.0, but the routing and approval actions for users are basically the same as in version 3.1. A specification in Xspec 4.0 has a longer life cycle than in 3.1. Not only can you have different versions of a specification, but now you can have different drafts of a specifications. As a result, a specification can be re-routed several times.

There are also three types of routing cycles - Route for Build, Route for Final Approval, and Route for Trial Clearance. You use the Route for Build cycle when you are ready for a first review. After the document has been reviewed, the status will not change and reviewers will be able to enter more information to the document. This routing cycle enables you to have reviewers help you *build* the specification. You can send a document through a Route for Build cycle as often as needed. You use the Route for Trial Clearance for a document that you may soon need to route for final approval. Once you are finished correcting your document, you can use the Route for Final Approval. The Route for Final Approval will cause the specification to move up in status.

In Xspec 4.0, we moved the majority of Routing and Approval functions to the Action menu in the Xspec menu bar. As a result, reviewers will be able to access all their functions in the Action menu rather than in the Utilities menu. The reviewers will also be able to complete their activities in less mouse clicks than in 3.1.

The newest feature about Xspec 4.0's routing function is the ability to use a company's E-mail system to notify users that a document has been routed to them. For this feature to work, you must have a *direct* E-mail

connection. Also, the Maildoc.dll from your E-mail system must be present in the path of Xspec, or be copied to the same directory as Xspec. As a result, a reviewer can be notified through an E-mail message (figure 8) even when they are not logged into Xspec! This new feature enables your company to notify reviewers as soon as the document has been routed!

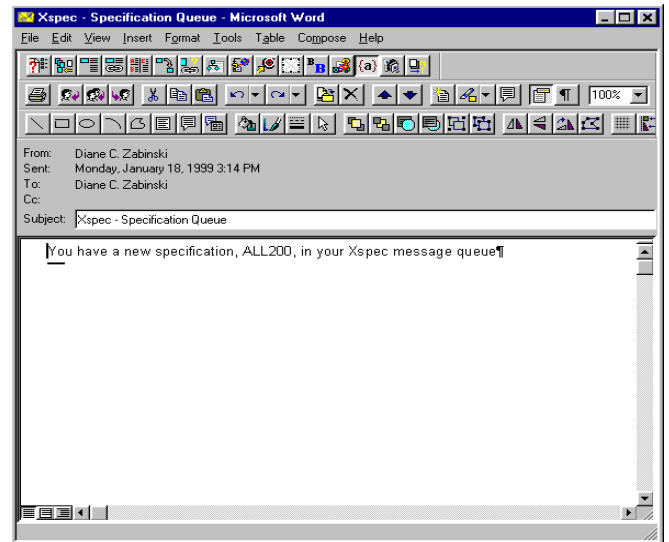


Figure 8

How Do I Get More Information?

If you would like more information on Xspec version 3.1 or 4.0, please contact your IMAS sales representative at 800-977-3248.



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