Overview

This quick reference card (QRC) for MasterControl summarizes how to use Tracking to determine where in the route a document is today and read details about its progress from collaboration through approvals. Tracking keeps records of both in-process and completed documents.

Using Tracking

In MasterControl, Tracking keeps running records of the progress of both in-process and completed documents as they move through approvals.

Task details list your tasks and all steps that a task has completed, all the steps yet to be completed, and comments made by users along the route.

Opening Tracking

1. Log in to MasterControl.
2. In the Navigation menu, expand My MasterControl.
3. Click Tracking.

The Task Tracking screen appears, listing all in-progress tasks that you have permission from the MasterControl Administrator to view.

Searching for a Task

Often, the list of in-process tasks can be long. To locate one or more specific tasks, use Search tool. For details on how to use search, see the MasterControl: Using the Search Button QRC.

1. On the toolbar near the top of the screen, click Search.
   The Search screen appears.
2. In any tab, complete as many of the search fields as you need to narrow down the list of tasks.
   Tip: If you plan to use this kind of search again in the future, consider saving the search.
3. Click Submit Search.
   The Task Tracking screen re-appears with the tasks that match your criteria.

Reading Details about the Document

To read extensive details about a document’s progress along the route:

1. On the Task Tracking screen, locate a particular task (if needed, see “Searching for a Task”).
2. On the Action column, click the task’s Details icon.

The Tracking Report for this document appears.

Icons appearing on this screen include:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📝</td>
<td>Comments</td>
</tr>
<tr>
<td>✔</td>
<td>Complete</td>
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<tr>
<td>⏿</td>
<td>In-Process</td>
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<tr>
<td>🔍</td>
<td>Details</td>
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<tr>
<td>📁</td>
<td>View document</td>
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<tr>
<td>📘</td>
<td>View InfoCard</td>
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<tr>
<td>🔍</td>
<td>View PDF</td>
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<tr>
<td>🔍</td>
<td>View redlines</td>
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</tbody>
</table>

The first section contains the Packet Task Name, Route Name, Current Step, and Status. An icon at Current Step indicates the task is still in process.
The second section displays the **Instructions** (the reason for the work) and the **Contents** of the packet (**InfoCard Number**, **Revision** level, **Title**, **File**, and the **Actions** column).

At the bottom of the screen are two tabs: **Report Details** and **Complete History**, detailed in the next two sections.

### Viewing Past and Present Steps

The **Report Details** page lists the history of the task by listing the user on each step, when they were notified, and, if finished, when it was completed.

In the **Comments** column:

- **N/A** appears if the user has no comment at any step before sign off.
- **None** appears when a user has no comments at sign off.
- A balloon icon appears when there is a comment.

You can view a comment a user entered into the system by clicking the icon. The text appears in a new window.

### Viewing Signed Off Steps

Click the **Complete History** tab to view the history of each step that has been signed off on the route. Included are approvals, rejections and Work in Process signoffs. The screen contains a list of each step that has been signed off and comments entered at any step. You can click a step name in the **Step Name** column to view the information for that step that is contained on the **Report Details** tab.

The **Complete History** tab is grayed out and unavailable for tasks that have no steps signed off.

### Getting Help

If you experience any technical problems working with MasterControl that you are unable to resolve, email the Duke Clinical Research Institute (DCRI) Service Desk at dcriservicedesk@dm.duke.edu. For time-sensitive issues, call them Monday–Friday (except DCRI holidays), 6 a.m. to midnight, at 919.668.8916.