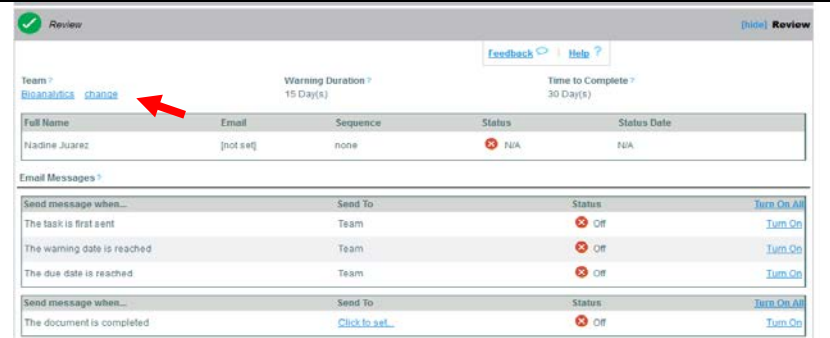




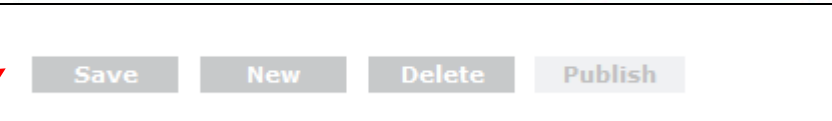

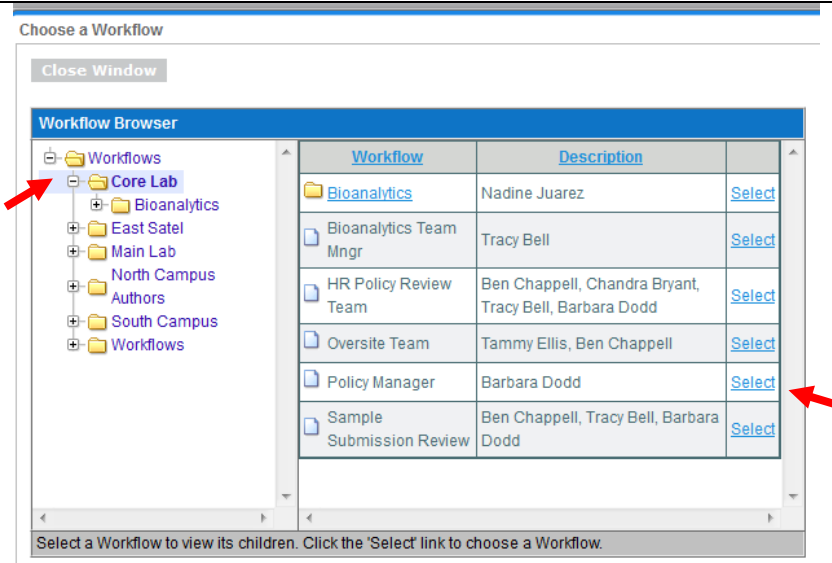


Policy – Review	
Step	Action
1.	<p>Navigate to the List Tab.</p> <p>Select the Site you want to work in (Core Lab in this example).</p> <p>Select Edit for the Sample Submission Policy.</p>
2.	<p>Select the Review color bar to expand.</p>

<p>3.</p>	<p>Notice the Status column. The red Xs indicate that none of the team members have yet worked on their task.</p> <p>First, we will select the team to work on the revision of this Policy. Reminder, teams are created in the License Site Tab (see Quick Reference Policy – Team Builder for instructions.)</p>	
<p>4.</p>	<p>Select the Sample Submission Review team.</p>	
<p>5.</p>	<p>The team is set up as a Sequence type of team – and you will see that Ben will first Review the policy, then Tracy, followed by Barbara.</p>	
<p>6.</p>	<p>Next we decide if the Team should receive an email message – when the task is first sent, when the warning date is reached, and when the due date is reached. In this example, we want to have them receive an email for all three. So we will select Turn On All link.</p>	

7.	<p>You may also select only 1 or 2 of the notifications, or none at all, by selecting the Turn Off/On link for the individual employee.</p>	
8.	<p>Select Save.</p>	
9.	<p>You may want someone (manager, administrator, etc) to receive an email once the Revision process has been complete. Select Click to set.</p>	
10.	<p>Select who should be notified when the Revisions have been completed.</p> <p>Notice that the Core Lab workflow folder is selected on the left and who we want to select is the Policy Manager, Barbara Dodd.</p> <p>Choose Select next to Policy Manager.</p>	

11. The email notification has been turned on.

Review [hide] Review

[Feedback](#) | [Help](#) ?

Team [?] [Sample Submission Review](#) [change](#) Warning Duration [?] 15 Day(s) Time to Complete [?] 30 Day(s)

Full Name	Email	Sequence	Status	Status Date
Ben Chappell	bchappell@staffready.com	1	❌ N/A	N/A
Tracy Bell	tbell@staffready.com	2	❌ N/A	N/A
Barbara Dodd	support@maplewoodssoftware.com	3	❌ N/A	N/A

Email Messages [?]

Send message when...	Send To	Status	Turn Off/All
The task is first sent	Team	✅ On	Turn Off
The warning date is reached	Team	✅ On	Turn Off
The due date is reached	Team	✅ On	Turn Off

Send message when...	Send To	Status	Turn Off/All
The document is completed	Police Manager	✅ On	Turn Off