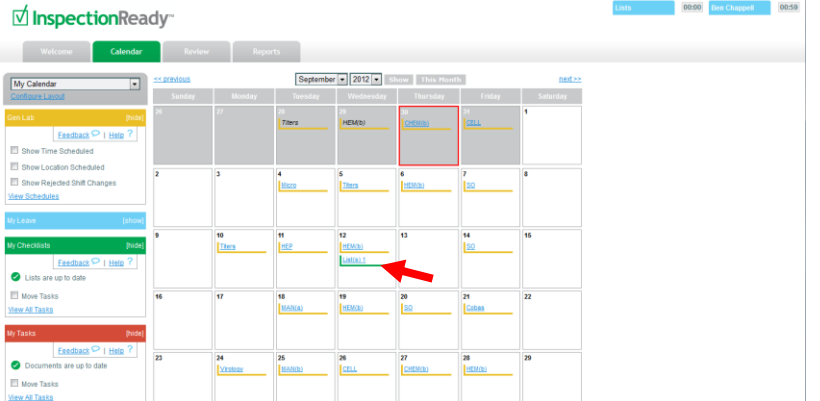
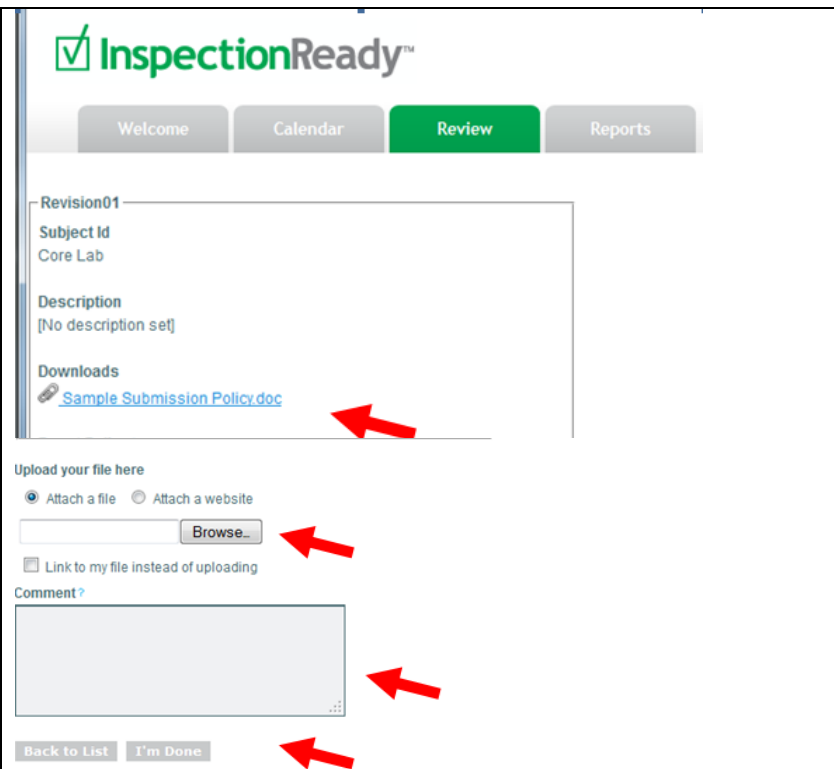
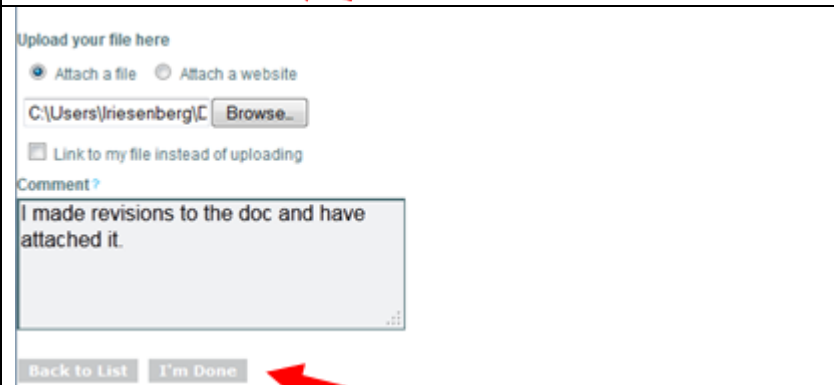


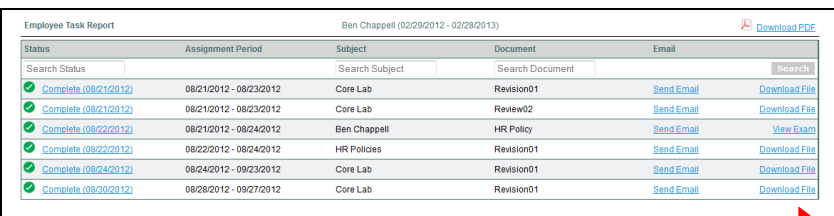
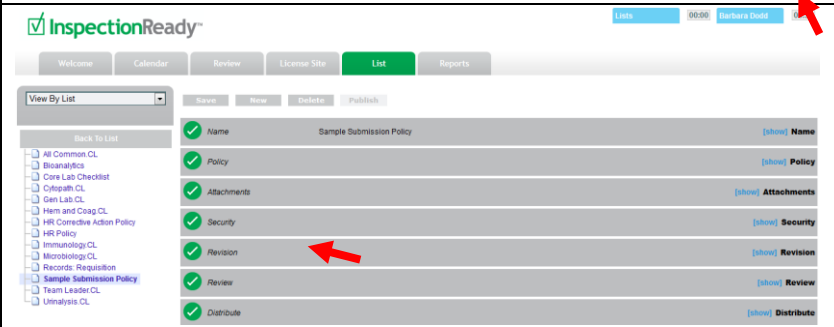
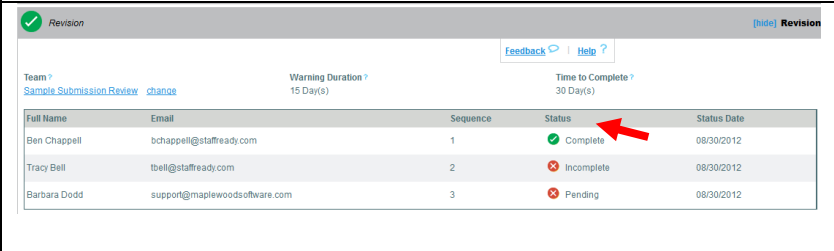
Policy – For Employees Tasks	
Step	Action
1.	We've created a Policy called Sample Submission Policy and it has been published to the Employees for Revision and Review. Let's look at the process that the Employees who received the tasks follow for Revising and Reviewing the Policy.
2.	This is the sequence in which the Policy will be revised and reviewed.
3.	We are now logged in as Ben Chappell. Ben has been the first assignee assigned to review this Policy. Once logged in, select InspectionReady from the drop-down menu in the upper right-hand corner of your screen.
4.	First select the Calendar Tab and see how the Policy Revision shows up. See September 12. Select Lists(s) 1.

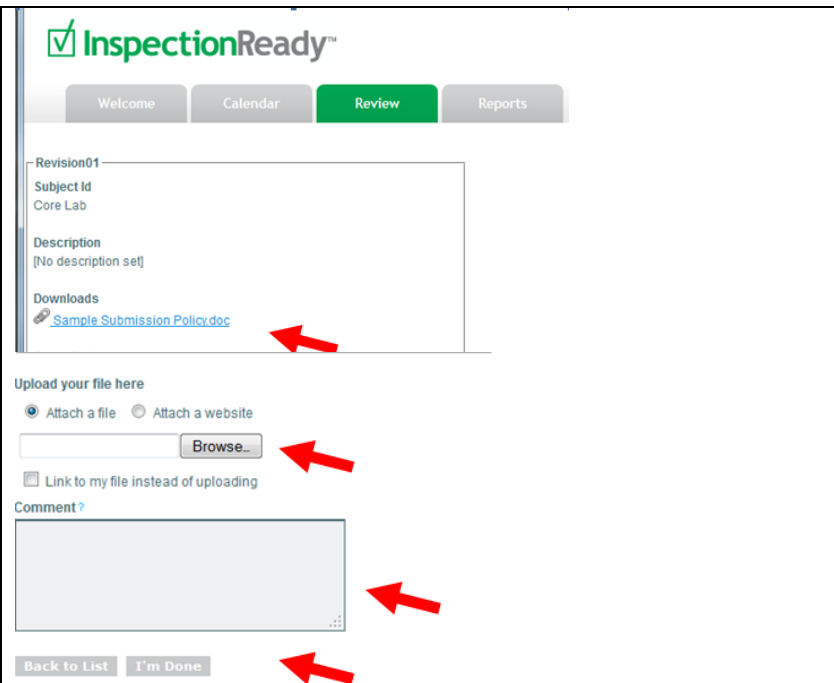

Full Name	Email	Sequence
Ben Chappell	bchappell@staffready.com	1
Tracy Bell	tbell@staffready.com	2
Barbara Dodd	support@maplewoodssoftware.com	3



<p>5.</p>	<p>Another way for the employee to see his or her tasks is to use the Review Tab. Select the Review Tab.</p>																																				
<p>6.</p>	<p>This is the Employee Task Report for Ben. His tasks can be viewed by year, month, week, or a custom timeframe.</p> <p>Click on Help for a full description of the Report.</p>																																				
<p>7.</p>	<p>For more instructions, Ben may also select the Quick Reference or video Tutorial by selecting the appropriate link.</p> <p>Click the X in the upper right corner when finished.</p>																																				
<p>8.</p>	<p>Here we see that out of the six tasks listed, the bottom five have been completed and the first one has not yet been worked on.</p> <p>To begin working on this task, Ben will select Begin Task.</p>	<table border="1"> <thead> <tr> <th>Status</th> <th>Assignment Period</th> <th>Subject</th> <th>Document</th> <th>Email</th> </tr> </thead> <tbody> <tr> <td>Ready (09/12/2012)</td> <td>09/12/2012 - 10/12/2012</td> <td>Core Lab</td> <td>Revision01</td> <td>Send Email Begin Task</td> </tr> <tr> <td>Complete (08/21/2012)</td> <td>08/21/2012 - 08/23/2012</td> <td>Core Lab</td> <td>Revision01</td> <td>Send Email Download File</td> </tr> <tr> <td>Complete (08/21/2012)</td> <td>08/21/2012 - 08/23/2012</td> <td>Core Lab</td> <td>Revision02</td> <td>Send Email Download File</td> </tr> <tr> <td>Complete (08/22/2012)</td> <td>08/21/2012 - 08/24/2012</td> <td>Ben Chappell</td> <td>HR Policy</td> <td>Send Email View Exam</td> </tr> <tr> <td>Complete (08/22/2012)</td> <td>08/22/2012 - 08/24/2012</td> <td>HR Policies</td> <td>Revision01</td> <td>Send Email Download File</td> </tr> <tr> <td>Complete (08/24/2012)</td> <td>08/24/2012 - 09/23/2012</td> <td>Core Lab</td> <td>Revision01</td> <td>Send Email Download File</td> </tr> </tbody> </table>	Status	Assignment Period	Subject	Document	Email	Ready (09/12/2012)	09/12/2012 - 10/12/2012	Core Lab	Revision01	Send Email Begin Task	Complete (08/21/2012)	08/21/2012 - 08/23/2012	Core Lab	Revision01	Send Email Download File	Complete (08/21/2012)	08/21/2012 - 08/23/2012	Core Lab	Revision02	Send Email Download File	Complete (08/22/2012)	08/21/2012 - 08/24/2012	Ben Chappell	HR Policy	Send Email View Exam	Complete (08/22/2012)	08/22/2012 - 08/24/2012	HR Policies	Revision01	Send Email Download File	Complete (08/24/2012)	08/24/2012 - 09/23/2012	Core Lab	Revision01	Send Email Download File
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Complete (08/24/2012)	08/24/2012 - 09/23/2012	Core Lab	Revision01	Send Email Download File																																	

<p>9.</p>	<p>Here are the steps Ben will follow when revising this Policy:</p> <ol style="list-style-type: none"> 1. Download the document by clicking on the Sample Submission Policy link. 2. Edit the document. 3. Save As the document (per your company's guidelines). 4. Upload the Revised document by Attaching the file. 5. Making desired comments. <p>If not complete with making the revisions, click on Back to List. This will save what you've done and allow you to return later to finish. If you are complete with the task, select I'm Done.</p>	
<p>10.</p>	<p>Ben has completed editing the document, attached it, and made a comment.</p> <p>Select I'm Done.</p>	

<p>11.</p>	<p>The Employee Task Report now shows that this Task has been completed on 8/30/2012. You may view the document by selecting Download File.</p>																					
<p>12.</p>	<p>Now that the first Assignee has revised the Policy, let's go back to where the Policy was created by the Admin Barbara Dodd. We've now logged in as Barbara Dodd.</p> <p>As before, we:</p> <ol style="list-style-type: none"> 1. Select InspectionReady from the drop-down menu 2. Select the List Tab. 3. Select Edit for the Sample Submission Policy <p>Now select the Revision color bar.</p>																					
<p>13.</p>	<p>InspectionReady has updated the Revision Status. Ben has completed his task, and now Tracy Bell will have the task available for her to begin working on. Note that InspectionReady will not give Tracy access to work on this Policy until Ben is complete.</p> <p>Tracy will follow the same steps Ben did (Steps 3-9).</p>	 <table border="1"> <thead> <tr> <th>Full Name</th> <th>Email</th> <th>Sequence</th> <th>Status</th> <th>Status Date</th> </tr> </thead> <tbody> <tr> <td>Ben Chappell</td> <td>bchappell@staffready.com</td> <td>1</td> <td>Complete</td> <td>08/30/2012</td> </tr> <tr> <td>Tracy Bell</td> <td>tbell@staffready.com</td> <td>2</td> <td>Incomplete</td> <td>08/30/2012</td> </tr> <tr> <td>Barbara Dodd</td> <td>support@maplewoodssoftware.com</td> <td>3</td> <td>Pending</td> <td>08/30/2012</td> </tr> </tbody> </table>	Full Name	Email	Sequence	Status	Status Date	Ben Chappell	bchappell@staffready.com	1	Complete	08/30/2012	Tracy Bell	tbell@staffready.com	2	Incomplete	08/30/2012	Barbara Dodd	support@maplewoodssoftware.com	3	Pending	08/30/2012
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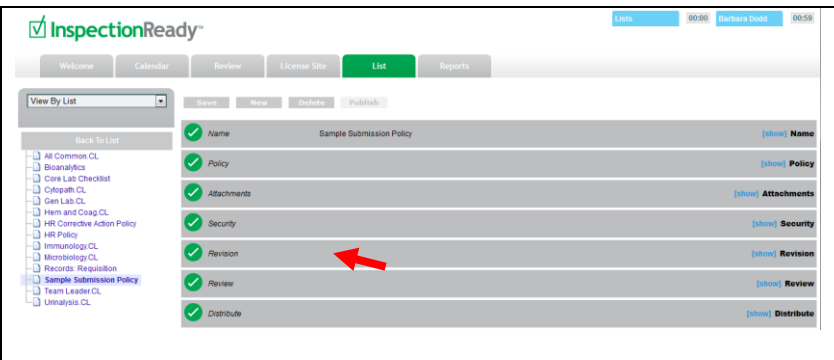
<p>14.</p>	<p>We are now logged in as Tracy Bell and Tracy will proceed just as Ben did and shown below:</p> <ol style="list-style-type: none"> 1. Download the document by clicking on the Sample Submission Policy link. 2. Edit the document. 3. Save As the document (per your company's guidelines). 4. Upload the Revised document by Attaching the file. 5. Making desired comments. <p>If not complete with making the revisions, click on Back to List. This will save what you've done and allow you to return later to finish. If you are complete with the task, you would select I'm Done.</p>	
<p>15.</p>	<p>Tracy has completed editing the document, attached it, and made a comment.</p> <p>Select I'm Done.</p>	

16. Now that the second Assignee has revised the Policy, let's go back to where the Policy was created by the Admin Barbara Dodd. We're now logged in as Barbara Dodd.

As before, we:

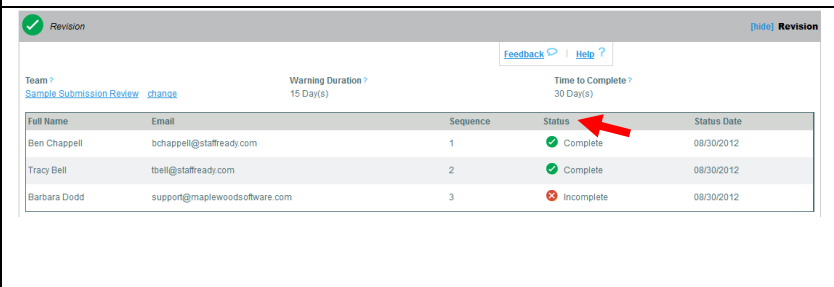
1. Select **InspectionReady** from the drop-down menu
2. Select the **List Tab**.
3. Select [Edit](#) for the Sample Submission Policy

Now Select the **Revision** color bar.

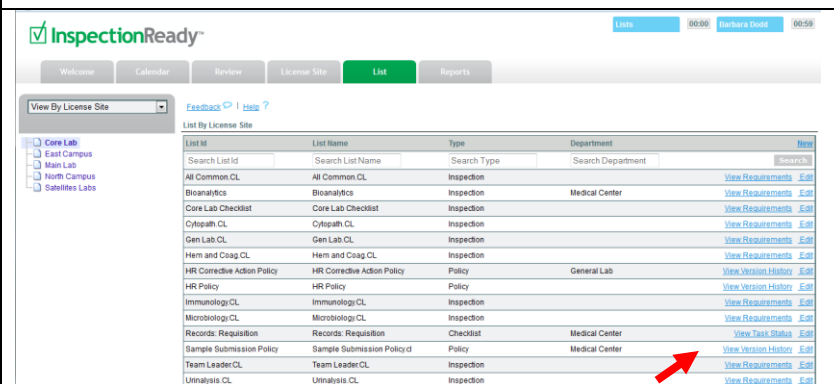


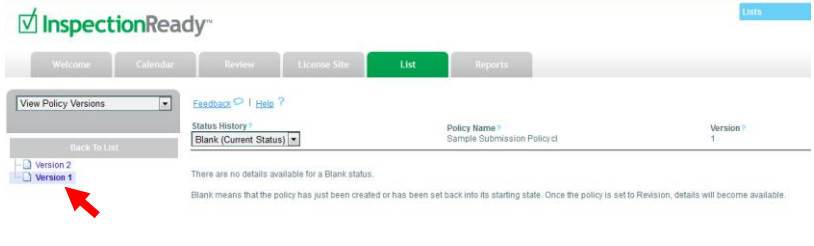
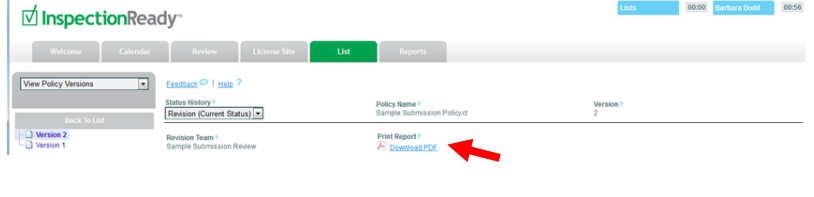

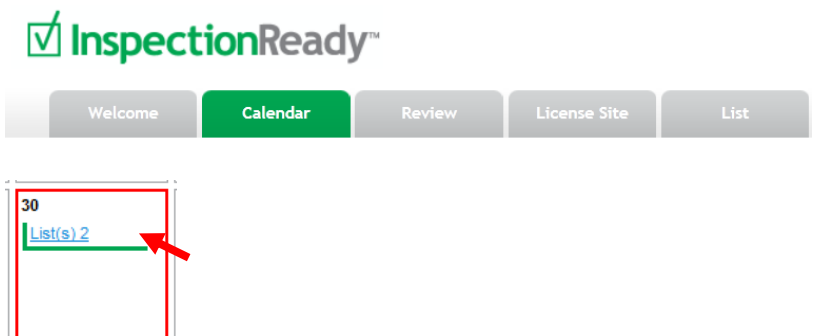
17. InspectionReady has updated the Revision Status.


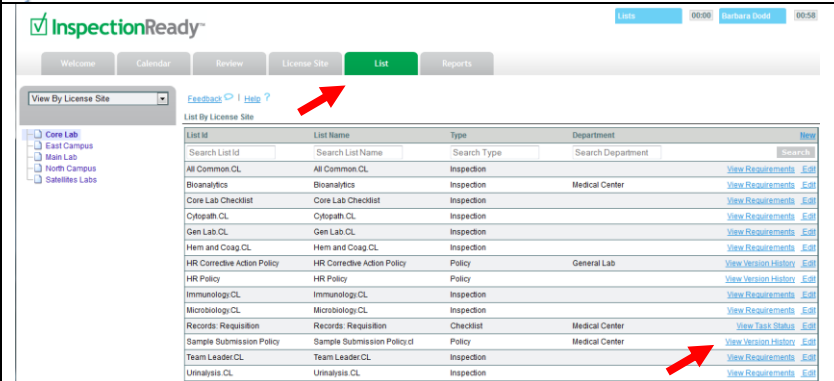
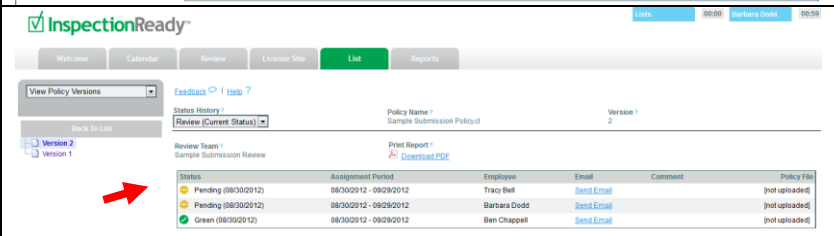
Ben and now Tracy have completed their tasks and now Barbara Dodd will have the task available for her to begin working on. Note that InspectionReady will not give Barbara access to work on this Policy until Ben and Tracy are complete.



18. We can view the status of the Revision tasks in another way. Select on [View Version History](#) for Sample Submission Policy.



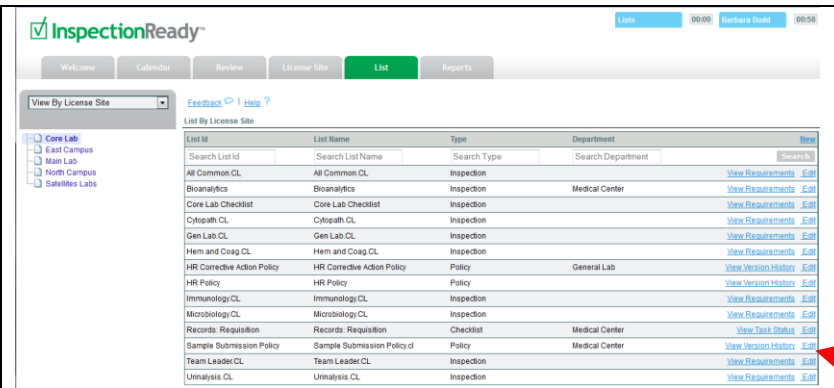
<p>19.</p>	<p>First review the folder tree on the left and Select Version 1.</p> <p>Version 1 has no details since it was just created. The status is Blank.</p>	
<p>20.</p>	<p>Version 2 is our current status. We see the Policy Name and the Version number in the top row. Then we see that the Team working on the Revisions is the Sample Submission Review Team.</p> <p>You are able to download a PDF of this screen/report by selecting the Download PDF link. You may save or print this report.</p>	
<p>21.</p>	<p>Select Back to List.</p>	
<p>22.</p>	<p>We will now go to Barbara's calendar by Selecting the Calendar Tab. Her tasks are shown on Aug 30. Barbara can select the link for her tasks and follow the same steps Ben did (Steps 3-9). (She may also review her tasks by selecting the Review tab.)</p>	

<p>23.</p>	<p>This is Barbara's input and she has selected I'm Done.</p>																																																																												
<p>24.</p>	<p>Navigate to the List Tab.</p> <p>Click View Version History.</p>	 <table border="1"> <thead> <tr> <th>List Id</th> <th>List Name</th> <th>Type</th> <th>Department</th> <th></th> </tr> </thead> <tbody> <tr> <td>All Common CL</td> <td>All Common CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Bioanalytics</td> <td>Bioanalytics</td> <td>Inspection</td> <td>Medical Center</td> <td>View Requirements Edit</td> </tr> <tr> <td>Core Lab Checklist</td> <td>Core Lab Checklist</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Cytopath CL</td> <td>Cytopath CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Gen Lab CL</td> <td>Gen Lab CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Hem and Coag CL</td> <td>Hem and Coag CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>HR Corrective Action Policy</td> <td>HR Corrective Action Policy</td> <td>Policy</td> <td>General Lab</td> <td>View Version History Edit</td> </tr> <tr> <td>HR Policy</td> <td>HR Policy</td> <td>Policy</td> <td></td> <td>View Version History Edit</td> </tr> <tr> <td>Immunology CL</td> <td>Immunology CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Microbiology CL</td> <td>Microbiology CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Records: Requisition</td> <td>Records: Requisition</td> <td>Checklist</td> <td>Medical Center</td> <td>View Task Status Edit</td> </tr> <tr> <td>Sample Submission Policy</td> <td>Sample Submission Policy.d</td> <td>Policy</td> <td>Medical Center</td> <td>View Version History Edit</td> </tr> <tr> <td>Team Leader CL</td> <td>Team Leader CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> <tr> <td>Urinalysis CL</td> <td>Urinalysis CL</td> <td>Inspection</td> <td></td> <td>View Requirements Edit</td> </tr> </tbody> </table>	List Id	List Name	Type	Department		All Common CL	All Common CL	Inspection		View Requirements Edit	Bioanalytics	Bioanalytics	Inspection	Medical Center	View Requirements Edit	Core Lab Checklist	Core Lab Checklist	Inspection		View Requirements Edit	Cytopath CL	Cytopath CL	Inspection		View Requirements Edit	Gen Lab CL	Gen Lab CL	Inspection		View Requirements Edit	Hem and Coag CL	Hem and Coag CL	Inspection		View Requirements Edit	HR Corrective Action Policy	HR Corrective Action Policy	Policy	General Lab	View Version History Edit	HR Policy	HR Policy	Policy		View Version History Edit	Immunology CL	Immunology CL	Inspection		View Requirements Edit	Microbiology CL	Microbiology CL	Inspection		View Requirements Edit	Records: Requisition	Records: Requisition	Checklist	Medical Center	View Task Status Edit	Sample Submission Policy	Sample Submission Policy.d	Policy	Medical Center	View Version History Edit	Team Leader CL	Team Leader CL	Inspection		View Requirements Edit	Urinalysis CL	Urinalysis CL	Inspection		View Requirements Edit
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<p>25.</p>	<p>InspectionReady has taken us to the Review process since the Revision process has been completed. You will see that Ben Chappell has now been assigned to review the Policy. Once he has completed the task of review, Tracy then Barbara will review in sequence.</p>	 <table border="1"> <thead> <tr> <th>Status</th> <th>Assignment Period</th> <th>Employee</th> <th>Email</th> <th>Comment</th> <th>Policy File</th> </tr> </thead> <tbody> <tr> <td>Pending (08/30/2012)</td> <td>08/30/2012 - 09/29/2012</td> <td>Tracy Bell</td> <td>Send Email</td> <td></td> <td>[not uploaded]</td> </tr> <tr> <td>Pending (08/30/2012)</td> <td>08/30/2012 - 09/29/2012</td> <td>Barbara Dodd</td> <td>Send Email</td> <td></td> <td>[not uploaded]</td> </tr> <tr> <td>Green (08/30/2012)</td> <td>08/30/2012 - 09/29/2012</td> <td>Ben Chappell</td> <td>Send Email</td> <td></td> <td>[not uploaded]</td> </tr> </tbody> </table>	Status	Assignment Period	Employee	Email	Comment	Policy File	Pending (08/30/2012)	08/30/2012 - 09/29/2012	Tracy Bell	Send Email		[not uploaded]	Pending (08/30/2012)	08/30/2012 - 09/29/2012	Barbara Dodd	Send Email		[not uploaded]	Green (08/30/2012)	08/30/2012 - 09/29/2012	Ben Chappell	Send Email		[not uploaded]																																																			
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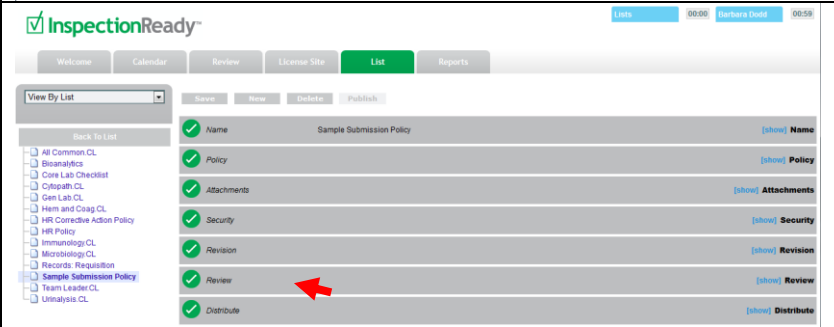
26. Let's view this from where we initially set up the Policy.

As before, we:

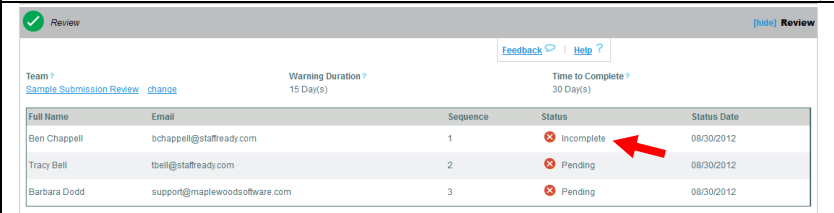
1. Select **InspectionReady** from the drop-down menu
2. Select the **List Tab**
3. Select [Edit](#) for the Sample Submission Policy



27. Select the **Review** color bar.

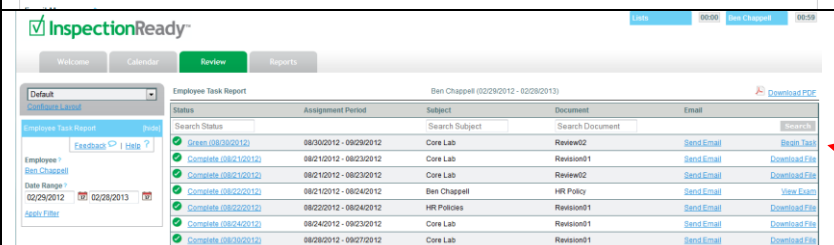


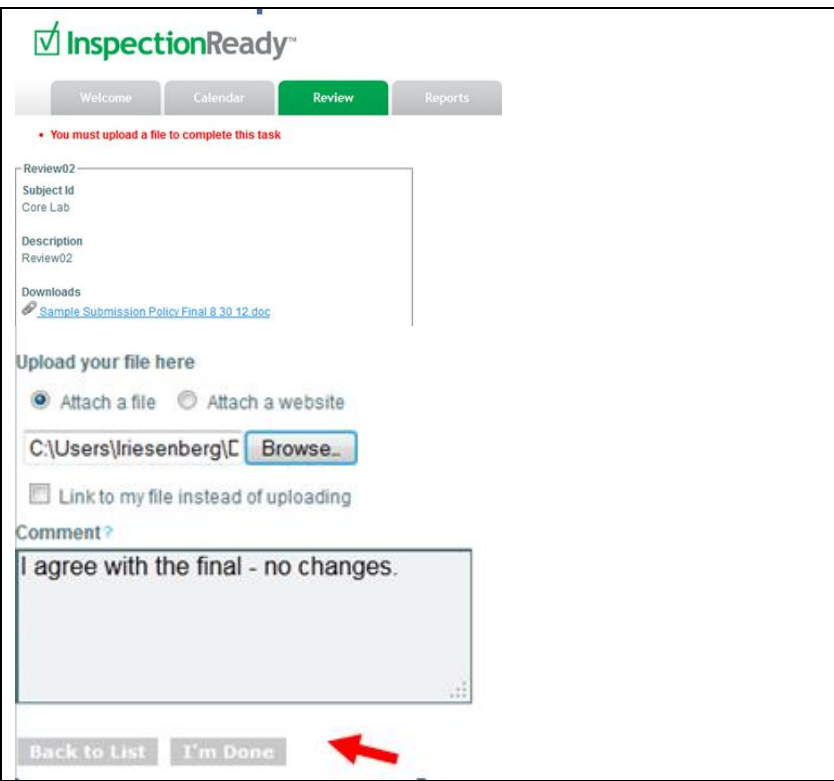
28. This view illustrates that Ben is up for reviewing the Revised Policy, then Tracy, and then Barbara.



29. Ben will follow the same steps he did when he was Revising the Policy.

He will select **Begin Task**.

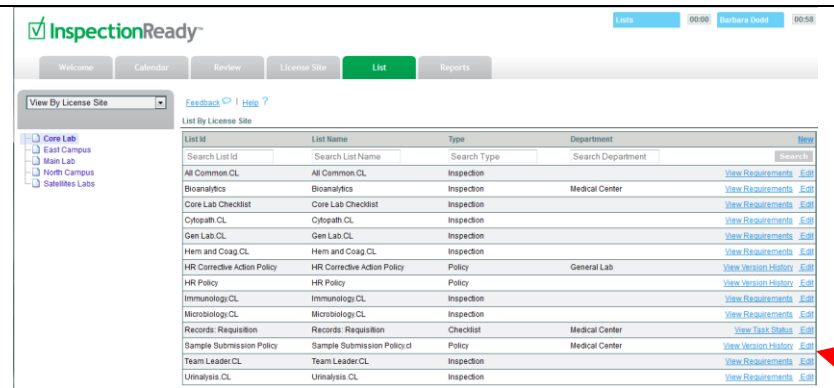


<p>30.</p>	<p>Even though Ben had no changes, InspectionReady requires he upload a document even if it is the same document.</p> <p>Select I'm Done.</p>	
<p>31.</p>	<p>Tracy and Barbara will now do their review. For this example, there are no changes to this Policy. This completes the tasks for the Employees.</p>	

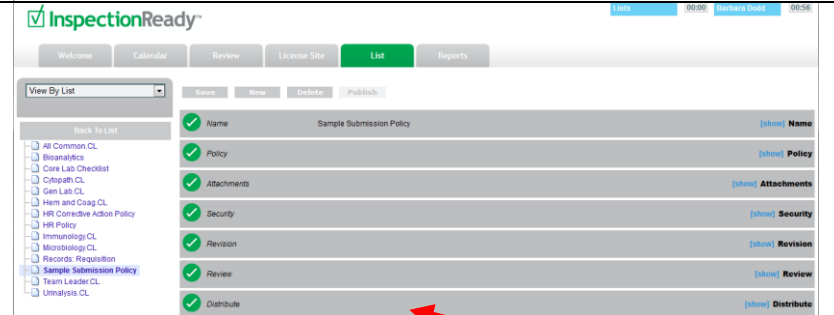
32. Let's view this from where we initially set up the Policy – with the Admin Barbara Dodd.

As before, we:

1. Select **InspectionReady** from the drop-down menu
2. Select the **List Tab**
3. Select [Edit](#) for the Sample Submission Policy



33. Select the **Distribute** color bar.



34. Once the Revision/Review process is complete, the Policy is set to Active status, and when that occurs, the Policy is automatically sent out to the Audience as defined in the Distribute color bar (Quick Reference Policy - Distribute).

