



Reviewers and Final Reviewers User Guide

Document Control Module



Introduction

A key part of any document control system is the review cycle. Adding Reviewers and Final Reviewers to that cycle ensures that no document is published without thorough scrutiny and quality control.

This user guide will cover how to set up or remove both reviewers and final reviewers, update or remove a document review team, and add employees to a review team.

Mastering the Reviewers and Final Reviewers features will allow you to feel comfortable as you know documents are being reviewed appropriately and not overlooked before being distributed.

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Add or Remove Reviewers

To begin adding reviewers, first navigate to the **Setup** tab of the Document Control module and select a folder from the tree picker. (Yellow box, Figure 1)

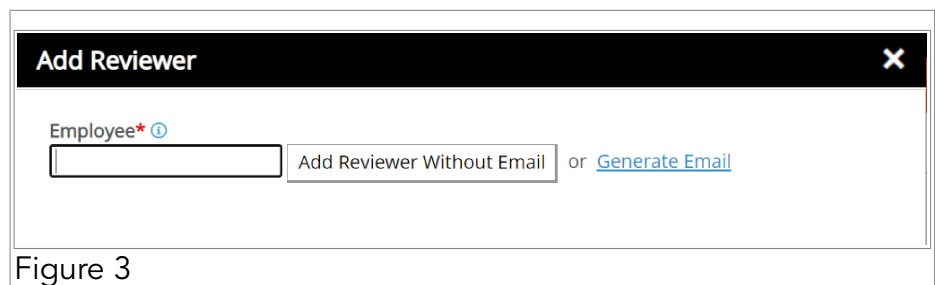
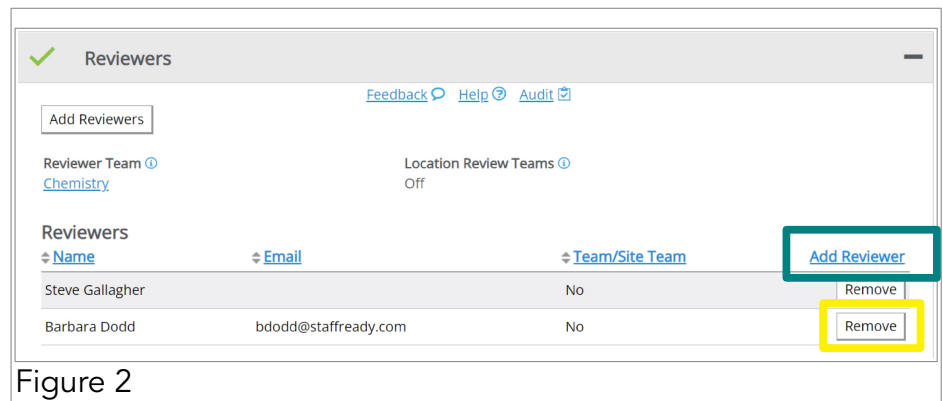
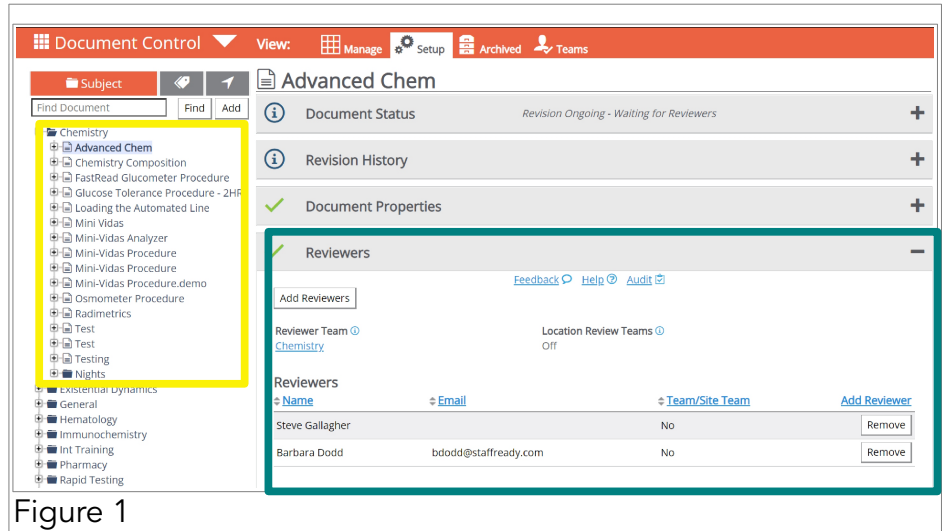
Select the **Reviewers** color bar (Teal box, Figure 1) to expand it.

Once expanded, there are two different ways to Add Reviewers. For the first method, select the **Add Reviewer** link. (Teal box, Figure 2)

This will open the **Add Reviewer** pop-up window. (Figure 3)

You can enter in an employee name and then select whether you will add the reviewer by sending a notification email or without sending one.

If you elected to add without sending a notification email, the employee will be immediately added to the list of reviewers.



Removing a Reviewer: To remove a Reviewer or Final Reviewer, select the **Remove** button next to that employee's name. (Yellow box, Figure 2)

Add or Remove Reviewers (Continued)

If you selected the **Generate Email** link, it will expand the **Add Reviewer** pop-up window and allow you to customize the email notification. (Figure 1)

Enter in the email of the employee, a subject line, a customized message line, and signature.

Once you've filled out each field, select the **Add and Send Email** button. (Yellow box, Figure 1)

The second method for adding reviewers is to select the **Add Reviewers** button. (Yellow box, Figure 2)

This will open the **Add Employees** pop-up window. (Figure 3)

You will be able to refine your search using the filters or by entering their name directly.

Once you've found the employee(s) you wish to add, select the **Add Employee** link next to their name.

That employee will now appear in the employee list under the **Reviewers** color bar.

Add Reviewer

Employee* or [Generate Email](#)

Email Address*

Subject*

Body*

Signature*

Note: The name of the document will automatically added to the body of this email.

Figure 1

Reviewers

Reviewer Team Location Review Teams

| Name | Email | Team/Site Team | Add Reviewer |
|---------------|----------------------|----------------|---------------------------------------|
| Karen Haswell | | No | <input type="button" value="Remove"/> |
| Gary Long | glong@staffready.com | No | <input type="button" value="Remove"/> |

Figure 2

Add Employees

Department

- Clinic [Select All Employees](#)
- Core Lab [Select All Employees](#)
- Inpatient Pharmacist [Select All Employees](#)

Figure 3

Add or Remove Final Reviewers

Final Reviewers act as additional insurance for document integrity and serve as a backstop for regular reviewers.

They are not required to complete a document review cycle and the role is typically assigned to supervisors or managers.

The process for adding **Final Reviewers** is identical to adding Reviewers. Please follow the steps outlined on pages 3 and 4.

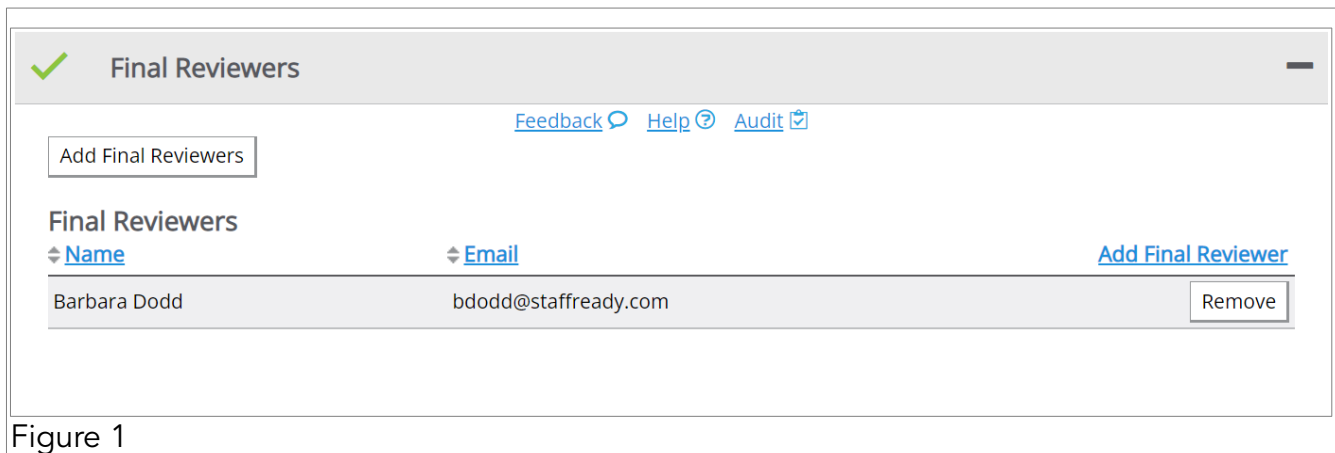


Figure 1

Add or Remove Document Review Teams

An additional option you have instead of assigning a review task to employees individually is to assign the review to a document review team. This is a predetermined set of Employees which you can assign to review documents.

To add a **Review** team, navigate to the **Reviewers** color bar and expand it. **(Figure 1)**

Select the **Reviewer Team** link. **(Yellow box, Figure 1)**

This will open the **Select Team** pop-up window. **(Figure 2)**

Select a team from the list using the **Select** button. **(Yellow box, Figure 2)**

If you wish to unassign a team from a document, select the **Set No Team** button. **(Teal box, Figure 2)**

To read more on how to set up Teams, please check our Teams user guide [here](#).

The link name displayed will update depending on which team you selected.

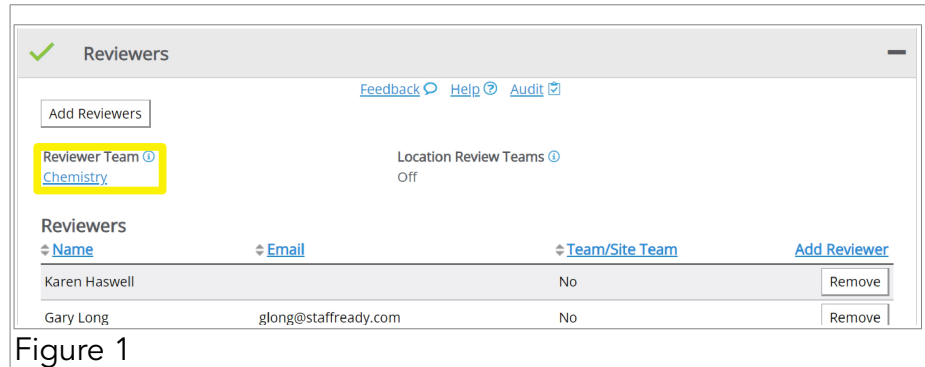


Figure 1

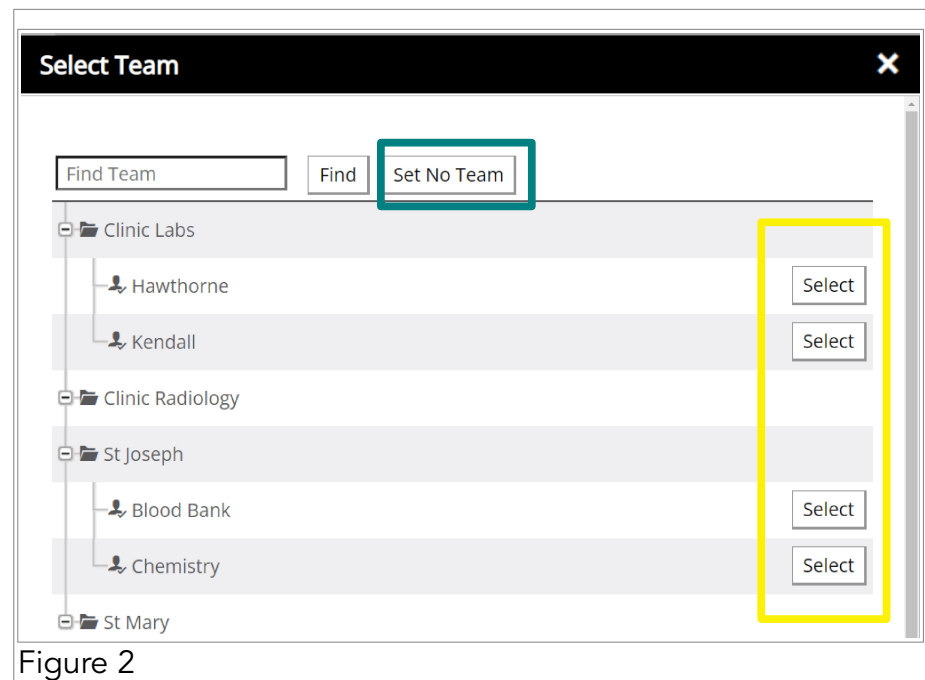


Figure 2

Resources

This concludes the User Guide for **Reviewers and Final Reviewers**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Document Control module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

[Online Support Form](#)

Related Topics

Please select any link to skip to that topic.

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