



Revision History Color Bar User Guide

Document Control Module



Introduction

As you utilize StaffReady Document Control, you will regularly be making changes to your documents. The Revision History color bar allows you to track and manage all changes made to a document.

You can view the changelog for the document as well as version information, who was assigned changes and what their role was. You can also check the status of feedback for a document, and comments made by reviewers.

The Revision History color bar makes keeping track of changes and document progress easy as the features are user-friendly, and StaffReady Document Control resides in the cloud. Mastering this feature means you will always be on top of document review cycles and real-time awareness of the status of all documents.

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Revision History Color Bar: Introduction

To access the **Revision History** color bar, navigate to the **Setup** tab in the Document Control module, select a document within a Subject folder, and then select the color bar to expand it. (Figure 1)

The screenshot shows the Document Control interface. The top navigation bar includes 'Document Control', 'View: Manage Setup Archived Teams', and a 'Subject' dropdown. The left navigation pane shows a tree structure under 'Chemistry' with 'Advanced Chem' selected. The main content area displays the 'Advanced Chem' document status as 'Revision Ongoing - Waiting for Approval'. Below this, the 'Revision History' section is expanded, showing a table of revisions. The table has columns for Version, Revision, Assigned, Role, Status, Reason, and Comments. The first row is highlighted in yellow.

Version	Revision	Assigned	Role	Status	Reason	Comments
1	1	Barbara Dodd	Owner	Complete - 07/03/2019		View Comments/Attachment
1	1.1	Barbara Dodd	Reviewer	Overridden - 11/22/2021	Review overridden by Document Owner	View Comments/Attachment
1	1.2	Steve Gallagher	Reviewer	Overridden - 11/22/2021	Review overridden by Document Owner	View Comments/Attachment
1	1.3	Gary Long	Reviewer	Overridden - 11/22/2021	Review overridden by Document Owner	View

Figure 1

You can view each review recommendation made by reviewers for a given document within this color bar. (Figure 2) Each document revision is listed sequentially in chronological order and can be filtered or sorted depending on your needs.

An explanation of each data column (Yellow box, Figure 2) can be found on page 4.

The close-up screenshot shows the 'Revision History' section with the table header highlighted in yellow. The table has columns for Version, Revision, Assigned, Role, Status, Reason, and Comments. The first row is highlighted in yellow.

Version	Revision	Assigned	Role	Status	Reason	Comments
1	1	Barbara Dodd	Owner	Complete - 07/03/2019		View Comments/Attachment
1	1.1	Barbara Dodd	Reviewer	Overridden - 11/22/2021	Review overridden by Document Owner	View Comments/Attachment
1	1.2	Steve Gallagher	Reviewer	Overridden - 11/22/2021	Review overridden by Document Owner	View Comments/Attachment
1	1.3	Gary Long	Reviewer	Overridden - 11/22/2021	Review overridden by Document Owner	View Comments/Attachment
1	1.4	Karen Haswell	Reviewer	Overridden - 11/22/2021	Review overridden by Document Owner	View Comments/Attachment
1	1.5	Harvey Durector	Reviewer	Overridden - 11/22/2021	Review overridden by Document Owner	View Comments/Attachment
1	2	Barbara Dodd	Owner	Complete - 11/22/2021		View Comments/Attachment

Figure 2

Revision History Details

Figure 1

Version	Revision	Assigned	Role	Status	Reason	Comments
1	1	Barbara Dodd	Owner	Complete - 05/30/2019		View My Comments/Attachment
1	1.1	Andrea Charles	Reviewer	Complete With Minor Changes - 05/30/2019		View Comments/Attachment

Version: The **Version** number of the Document starts at 1 and will change when a document is revised, edited, or refreshed, and another review cycle process is started. The **Version** number will automatically be assigned to the next number in sequential order. To avoid scrolling through multiple documents versions, use the **Version** drop down menu (**Yellow box, Figure 1**) to locate the desired version of a document you wish to review.

Revision: The **Revision** column lists all document changes that have been made by **Reviewers, Final Reviewers, and Approvers** throughout the document review cycle. The Document Control module catalogs your document revisions, providing a centralized method for reviewing and approving documentation.

Assigned: The **Assigned** column lists the names of all document **Reviewers, Final Reviewers, and Approvers** throughout the document review cycle. All modified documents are arranged by the Revision column and ordered sequentially. Select the **Assigned** link (**Teal box, Figure 1**) to group **Reviewers, Final Reviewers, or Document Owner** names together, or alphabetically by first name.

Role: The **Role** column lists the roles of all assigned **Reviewers, Final Reviewers, and Approvers** throughout the document review cycle. Roles are aligned next to the their associated revision number. Select the **Role** link (**Orange box, Figure 1**) to group by role type, or alphabetically by the **Role** name type.

Status: The **Status** column will display one of the following review statuses: **Assigned, Started, Candidate for Approval, Denied, Approved, Reviewer Removed, Approver Removed, Owner Removed, Overridden, Aborted, Complete with No Changes, Complete with Minor Changes, Complete with Major Changes, and Complete.**

Reason: The **Reason** column lists the purpose for a change in a document's status during the document review process. In certain cases, a Reviewer or Final Reviewer of a document may need to be replaced, or their input may not be required during the document review cycle. Document owners can add or remove Reviewers during a review process when needed. Select the **Reason** link (**Green box, Figure 1**) to sort document revisions by Reason for status change.

Revision History Details (Continued)

Version	Revision	Assigned	Role	Status	Reason	Comments
1	1	Barbara Dodd	Owner	Complete - 05/30/2019		View My Comments/Attachment
1	1.1	Andrea Charles	Reviewer	Complete With Minor Changes - 05/30/2019		View Comments/Attachment

Figure 1

Comments: The **Comments** column provides document owners with document revision recommendations made by **Reviewers** and **Final Reviewers**.

Select the **View My Comments/Attachment** link to review document revision comments and suggestions made by Reviewers and/or Final Reviewers. This will open the **Overview** window for the selected revision. (Figure 1)

Select the **View** link (Teal box, Figure 2) to see what recommendation(s) **Reviewers** and/or **Final Reviewers** have posted about a document.

Select the **Download** link to download and review changes made directly to your document by **Reviewers** and/or **Final Reviewers**.

Revision	Assignee	Role	Status	Comment	Attachment
1	Barbara Dodd	Owner	Complete	view	Download
1.1	Andrea Charles	Reviewer	Complete With Minor Changes	view	[not set]

Figure 2

Resources

This concludes the User Guide for the **Revision History Color Bar**. 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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Approvers	PDF Document
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