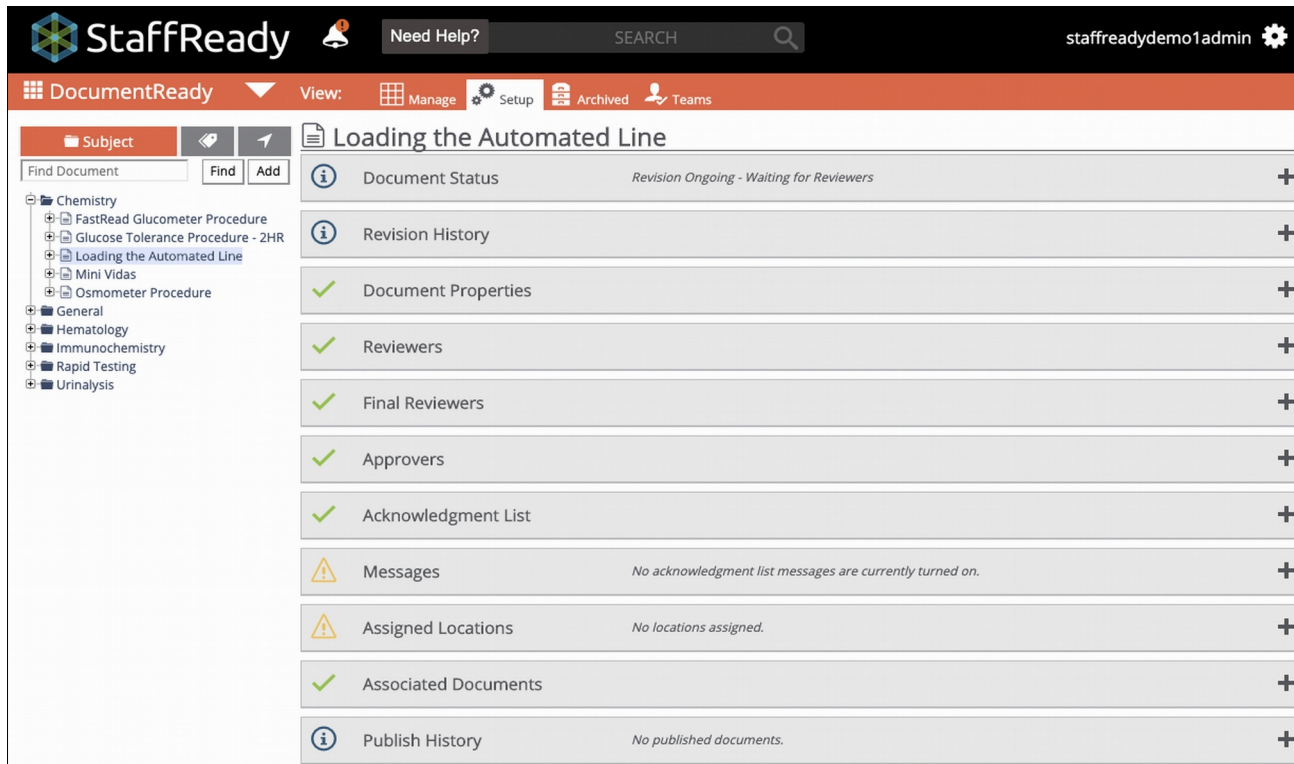


DocumentReady - Setup View

Approvers Color Bar

This reference guide provides a comprehensive overview of the options available in the **Approvers** color bar in the Setup View tab of the DocumentReady module. The following process steps and instructional information are provided in this document:

- [Approvers Color Bar Overview](#)
- [Adding a Document Approver](#)
- [Replace or Remove Document Approvers](#)



The screenshot displays the StaffReady DocumentReady Setup View interface. The top navigation bar includes the StaffReady logo, a 'Need Help?' button, a search bar, and the user 'staffreadydemo1admin'. The main content area is titled 'Loading the Automated Line' and features a 'Subject' dropdown menu with a search bar and 'Find' and 'Add' buttons. A tree view on the left shows a hierarchy of subjects, with 'Loading the Automated Line' selected. The main panel displays a list of setup options, each with a status indicator and a plus sign for expansion:

Item	Status	Details
Document Status	Information icon	Revision Ongoing - Waiting for Reviewers
Revision History	Information icon	
Document Properties	Checkmark	
Reviewers	Checkmark	
Final Reviewers	Checkmark	
Approvers	Checkmark	
Acknowledgment List	Checkmark	
Messages	Warning icon	No acknowledgment list messages are currently turned on.
Assigned Locations	Warning icon	No locations assigned.
Associated Documents	Checkmark	
Publish History	Information icon	No published documents.

1 | Approvers Color Bar Overview

Explanation of the Approvers Color Bar

The **Approvers** color bar allows you to manage responsible parties for documents that are ready to be published.

Approvers are the final authority on whether a document revision will be approved or denied. This is the last step before a document can be published.

Document **Approvers** are usually an organization's Medical Director, Senior Manager, or similar person with the authority to approve official documents.

The screenshot shows the DocumentReady interface. The top navigation bar includes 'DocumentReady', 'View: Manage', 'Setup', 'Archived', and 'Teams'. The main content area is titled 'Loading the Automated Line'. On the left, a tree view shows the document hierarchy under 'Chemistry', with 'Loading the Automated Line' selected. The right pane displays a list of document details:

Document Detail	Status	Action
Document Status	Revision Ongoing - Waiting for Reviewers	+
Revision History		+
Document Properties	✓	+
Reviewers	✓	+
Final Reviewers	✓	+
Approvers	✓	+

A yellow arrow points to the 'Approvers' row, which is highlighted in the original image.

2| Adding a Document Approver

Adding Approvers to a Document Review

1. Click the **Approvers** color bar to open it.

The screenshot shows the DocumentReady interface. The top navigation bar includes 'DocumentReady', 'View: Manage Setup Archived Teams', and a 'Subject' dropdown. The main content area is titled 'Loading the Automated Line' and shows a document status of 'Revision Ongoing - Waiting for Reviewers'. A sidebar on the left lists various procedures, with 'Loading the Automated Line' selected. The main content area has several sections: 'Document Status', 'Revision History', 'Document Properties', 'Reviewers', 'Final Reviewers', and 'Approvers'. A yellow arrow points to the 'Approvers' section, which has a green checkmark icon.

2. There are two ways to add a document **Approver**:

a. Click the [Add Approver](#) link.

b. Click the **Add Approvers** button.

The screenshot shows the 'Approvers' configuration page. At the top, there is a green checkmark icon and the title 'Approvers'. Below the title, there are links for 'Feedback', 'Help', and 'Audit'. A yellow arrow points to the 'Add Approvers' button. Below this, there is a section for 'Site Approvers' which is currently 'Off'. The main section is titled 'Approvers' and contains a table with columns for 'Name', 'Email', and 'Site'. A yellow arrow points to the 'Add Approver' link at the end of the table. The table has one row with the following data:

Name	Email	Site	
Bernadette Martin	bmartin@staffready.com	[not associated]	Replace Remove

Adding Approvers to a Document Review

Method One: Clicking the [Add Approver](#) link.

1. Type the name of the desired employee into the **Employee** field, and select their name from the auto-complete menu.

- To add the **Approver** without sending them an email notification, click the **Add Approver Without Email** button.
- To add the **Approver** and generate an email notification, click the [Generate Email](#) link.
- Confirm the email address, message subject and body, and signature, then click the **Add and Send Email** button.

Add Document Approver [X]

Employee* ⓘ
 Add Approver Without Email or [Generate Email](#)

Add Document Approver [X]

Employee* ⓘ
 Leonard Curtis Add Approver Without Email or [Generate Email](#)

Email Address* ⓘ

Subject* ⓘ

Body* ⓘ

Signature* ⓘ

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

Adding Approvers to a Document Review

Method Two: Clicking the **Add Approvers** button.

1. Click the **Add Approvers** button. This will open the **Add Employees** screen.

2. Use the left side menu to select an **Approver** from either a **Department**, **Job Title**, **Schedule**, or **Skillset**.

3. Search for an **Approver** or group of **Approvers** using the **Find employee or department job title, schedule, or skillset** text field.

4. Click the **Find** button.

5. Click the **Select All Employees** link to add all employees as document **Approvers**.

Adding Approvers to a Document Review

6. To select individual employees as **Approvers**, click the + and - (plus and minus) icons in the tree to expand or collapse entries.

7. Click the [Select Employee](#) link to select an individual Approver.

8. To view **All Departments** or **Only Managed Departments**, click the [Show All Departments](#) or [Show Only Managed Departments](#) link to toggle between department list views.

Department

Find employee or department Find

[Show All Departments](#)

Department	Action
<ul style="list-style-type: none"> <ul style="list-style-type: none"> Adrian Osborne Andrea Charles Bernadette Martin Chris Paul Danielle Garrett Danny White Ellie Pope Ellie Sumner Emma Bowers 	<ul style="list-style-type: none"> Select All Employees Select All Employees Select Employee Select Employee Select Employee Select Employee Select Employee Select Employee Select Employee Select Employee

Department

Find employee or department Find

[Show Only Managed Departments](#)

Department	Action
<ul style="list-style-type: none"> Clinic Core Lab Inpatient Pharmacist Inpatient Technician North Main StaffReadyDemo 	<ul style="list-style-type: none"> Select All Employees Select All Employees Select All Employees Select All Employees Select All Employees Select All Employees

3 | Replace or Remove Document Approvers

Replace or Remove Approvers from a Document Review

1. Click the **Approvers** color bar to open it.

2. To remove an **Approver**, click the **Remove** button.

3. To replace an **Approver**, click the **Replace** button.

Note: The **Replace Approver** window displays the total number of documents (total amount is noted in parenthesis), as well as a full list of the document names, identifiers and statuses for all documents assigned to the current **Approver**.

The screenshot shows the DocumentReady interface for a document titled "Loading the Automated Line". The document status is "Revision Ongoing - Waiting for Reviewers". The left sidebar shows a tree view of document categories, with "Loading the Automated Line" selected. The main content area lists document sections: Document Status, Revision History, Document Properties, Reviewers, Final Reviewers, and Approvers. A yellow arrow points to the "Approvers" section, which has a green checkmark and a plus sign.

The screenshot shows the "Approvers" window. It includes an "Add Approvers" button, "Site Approvers" (Off), and a table of approvers. The table has columns for Name, Email, and Site. The first row is for Bernadette Martin. To the right of the table are "Replace" and "Remove" buttons. A yellow arrow points to the "Replace" button, and another yellow arrow points to the "Remove" button.

Name	Email	Site
Bernadette Martin	bmartin@staffready.com	[not associated]

Replace or Remove Approvers from a Document Review

4. To search for a specific **Document Name**, **Document Identifier** or **Status**, type in the text field and click the **Filter** button to search and review your results.

5. Type the name of the new **Approver** in the **New Approver** text field.

6. Select one of the following Replacement Methods-

a. **This document only:** the **New Approver** will be assigned to the currently selected document.

b. **All published documents:** only published documents will be assigned to the **New Approver**.

c. **All documents:** all published **and** unpublished documents will be assigned to the **New Approver**.

7. Click the **Save Changes** button to replace the **Approver**.

The screenshot shows a 'Replace Approver' dialog box. At the top, it displays the current 'Approver' as 'Matt Swanson' and 'Documents' as '40 (14 Published)'. Below this is a pagination control showing 'Showing 1 to 5 of 40' with a list of page numbers (1, 2, 3, 4, 5, 6, 7, 8, >, >>). A table lists documents with columns for 'Document Name', 'Identifier', and 'Status'. The first document, 'Adding Documents for Review from a File or URL', is highlighted. Below the table, the 'New Approver' field contains 'Barbara Dodd'. Under 'Replacement Method', the 'This document only' radio button is selected. A 'Save Changes' button is at the bottom. Yellow arrows point to the 'Filter' button, the 'Filter Document Name' field, the 'Filter Identifier' field, the 'Filter Status' field, the 'New Approver' field, the 'This document only' radio button, and the 'Save Changes' button.

Document Name	Identifier	Status
Adding Documents for Review from a File or URL	Sprt.DOC.016	Published
Auto Inspect Brochure v5.0	MRKT.Print.001	In Revision
Availability Override	TRAIN.PRES.005	Published
Brochure Refresh Project Plan	MRKT.PHY.003	Initial Revision
Chat Applications Matrix	Chat.PR.002	Published

Visit Our Training Center

Additional Information About DocumentReady

To learn more about the **DocumentReady** module, please review the following documents in the **Training Media Center**.

For assistance with the **Approvers** color bar or other **StaffReady DocumentReady** features, please contact our Customer Support team:

6am-5pm PST
Monday thru Friday
Phone: 1.877.229.5230
[Online Support Form](#)

→ Click the **Need Help?** box in StaffReady to access our online Chat feature!



DocumentReady Overview & Key Concepts	PDF Document
Adding New Documents	PDF Document
Document Status Color Bar	PDF Document
Revision Tasks Color Bar	PDF Document
Acknowledgment List Color Bar	PDF Document
Acknowledgment Tasks Color Bar	PDF Document
Revision History Color Bar	PDF Document
Reviewers Color Bar	PDF Document
Final Reviewers Color Bar	PDF Document

