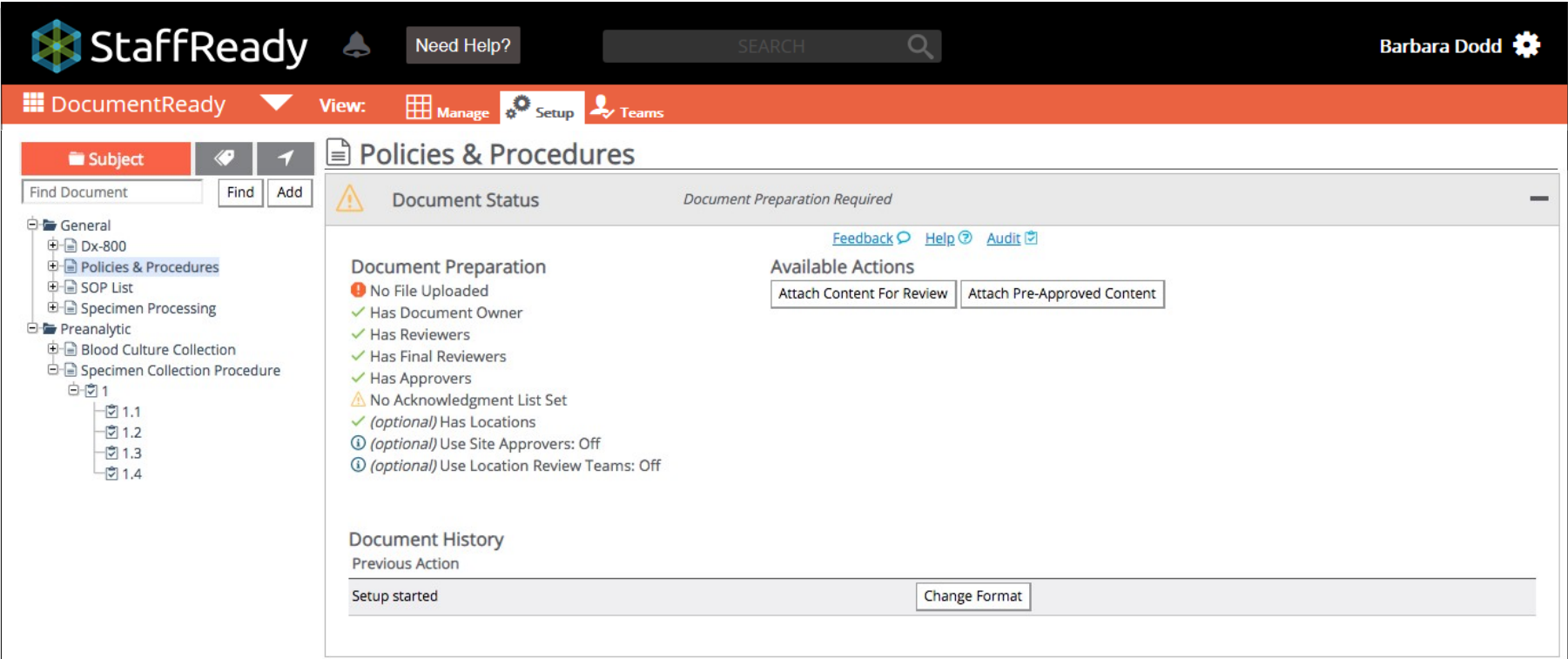


## DocumentReady - Setup View

### Document Status Color Bar

This reference guide provides a comprehensive overview of the Document Status color bar in the DocumentReady module. The Document Status color bar is a navigational tool that guides you through the process of creating, preparing, and managing review cycles for a document. The following process steps and instructional information are provided in this document:

- Document Preparation
- Review Cycle



The screenshot displays the StaffReady interface for the DocumentReady module. The top navigation bar includes the StaffReady logo, a search bar, and the user name Barbara Dodd. The main content area is titled "Policies & Procedures" and shows a "Document Status" section with a warning icon and the text "Document Preparation Required". Below this, there are two columns: "Document Preparation" and "Available Actions".

**Document Preparation**

- ❗ No File Uploaded
- ✅ Has Document Owner
- ✅ Has Reviewers
- ✅ Has Final Reviewers
- ✅ Has Approvers
- ⚠️ No Acknowledgment List Set
- ✅ (optional) Has Locations
- ⓘ (optional) Use Site Approvers: Off
- ⓘ (optional) Use Location Review Teams: Off

**Available Actions**

- Attach Content For Review
- Attach Pre-Approved Content

**Document History**

Previous Action

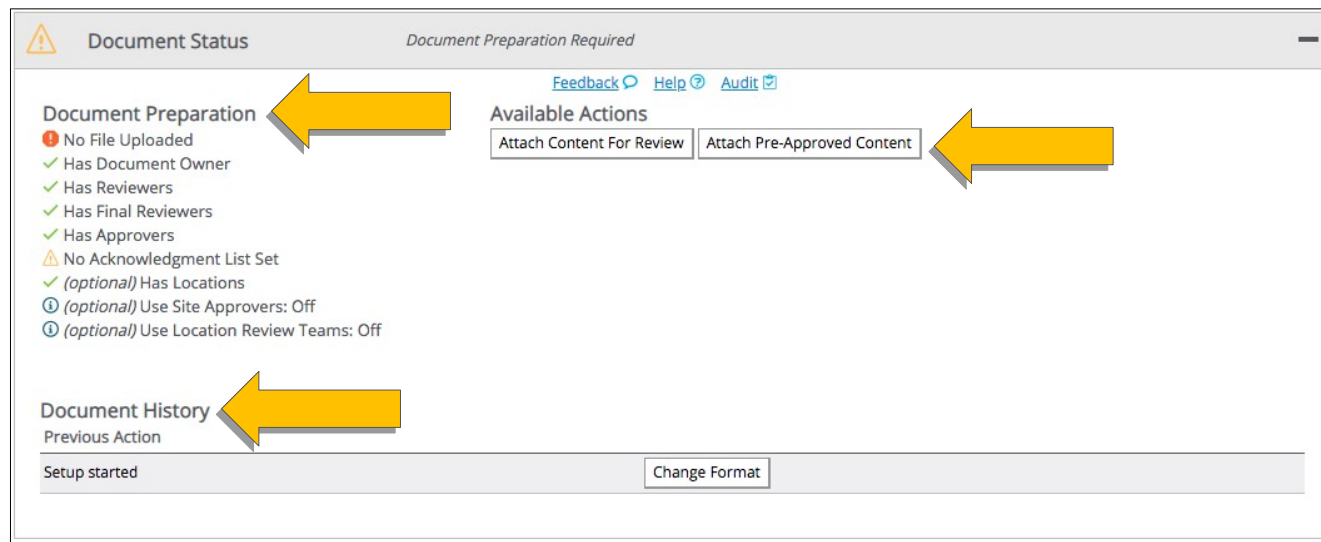
Setup started	Change Format
---------------	---------------

# 1 | Document Preparation

## Using the Document Status color bar to prepare a Document for Review

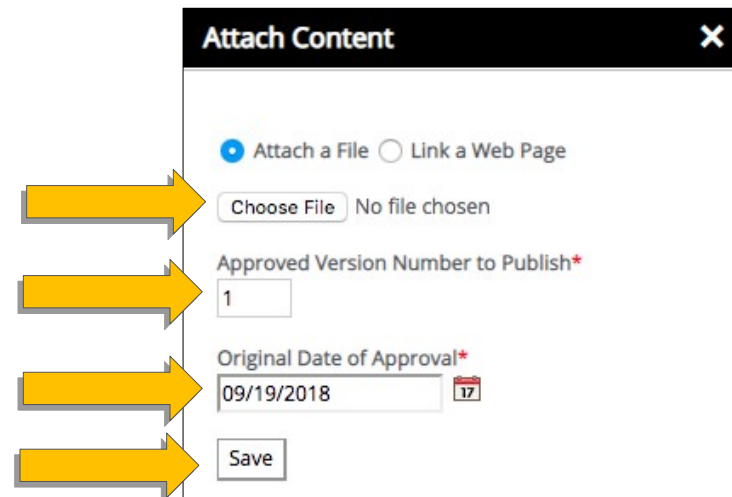
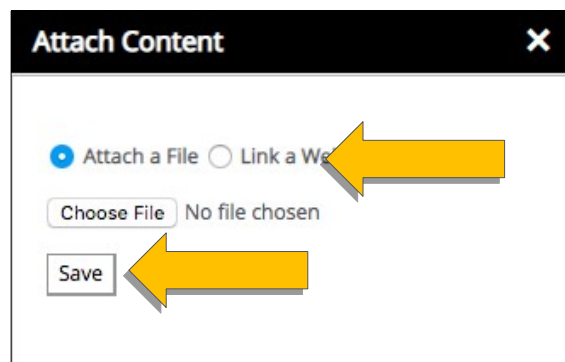
1. After a document is created, the Document Status color bar displays three sections: **Document Preparation**, **Available Actions**, and **Document History**.

- **Document Preparation** lists steps required to prepare a document for review, with status-alert icons for each.
- **Available Actions** provides buttons for the next step in a document's preparation.
- **Document History** lists all activity for the document, with relevant buttons provided for next steps.



2. Clicking the **Attach Content For Review** or **Attach Pre-Approved Content** buttons will open the Attach Content window. Select the correct file or URL and click the **Save** button to upload.

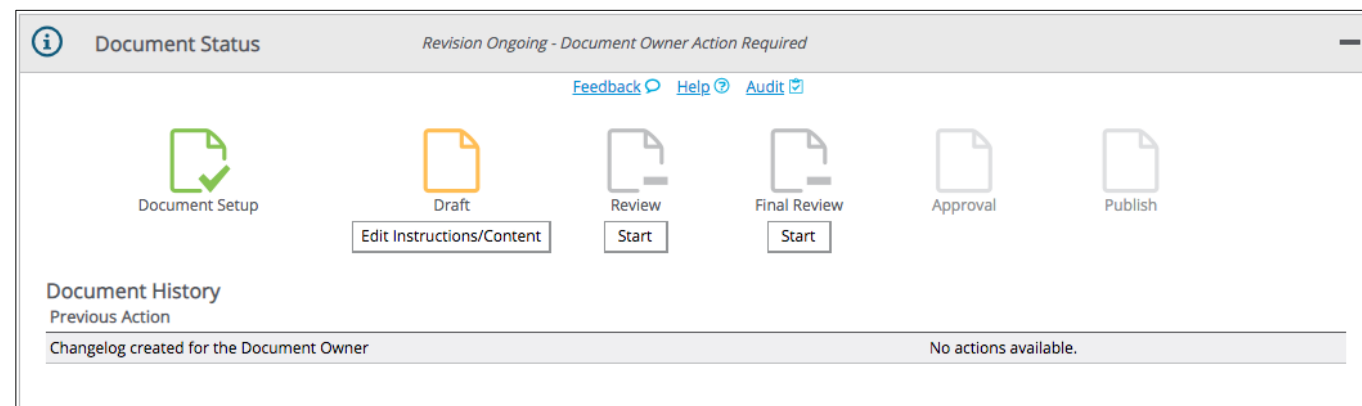
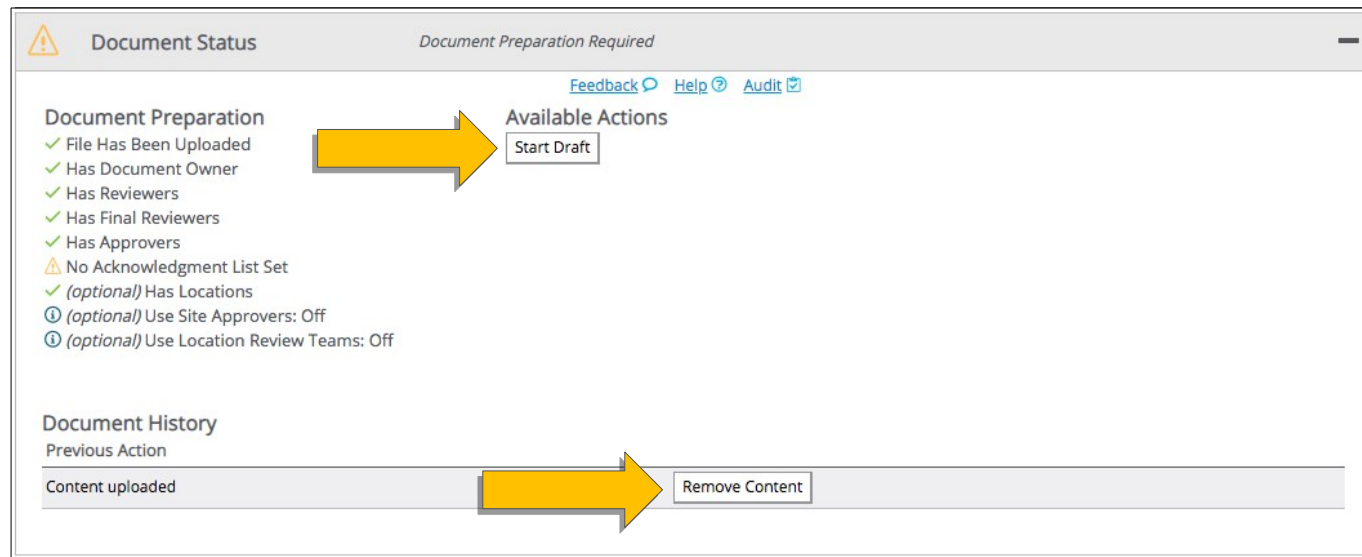
- Pre-Approved documents require a **Version Number** and **Original Date of Approval**.



3. Once the document is linked to a file or URL, the Document Status color bar will update with new **Start Draft** and **Remove Content** buttons.

- The **Remove Content** button will delete the linked file, URL, or Competency exam from the document and return you to the previous step. **NOTE:** This function does not ask for confirmation before removing the file.

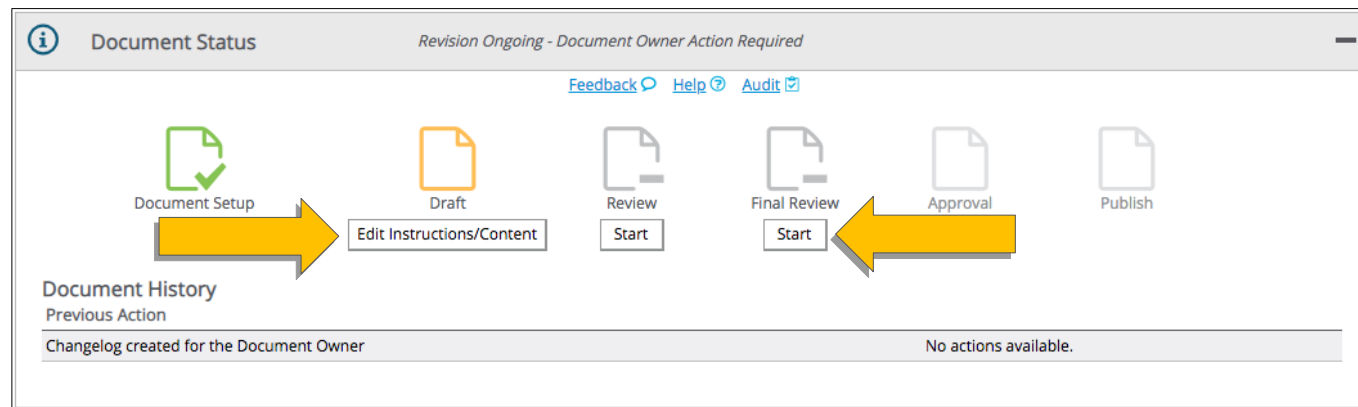
- The **Start Draft** button will begin the review process and update the display with new buttons and status alerts.



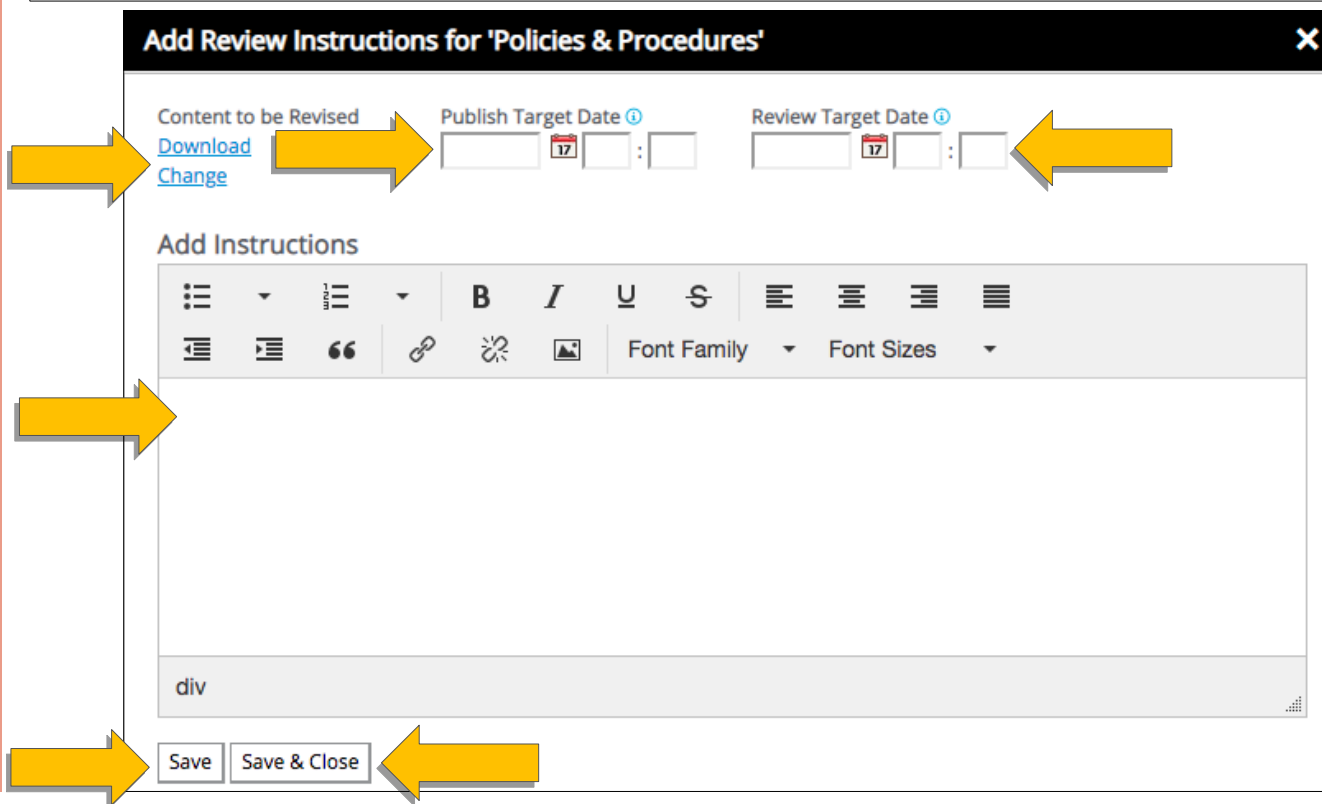
## 2 | Review Cycle

### Using the Document Status color bar to manage a Document Review

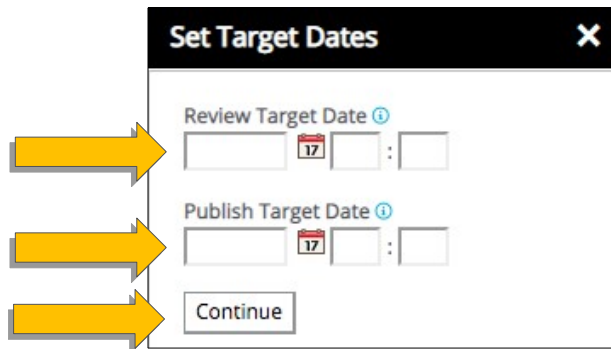
1. After preparing a document, you can initiate a Review. Click **Edit Instructions/Content** to add instructions or change the file linked to the document, or click the **Start** button below the **Review** or **Final Review** icons to start the Review cycle.



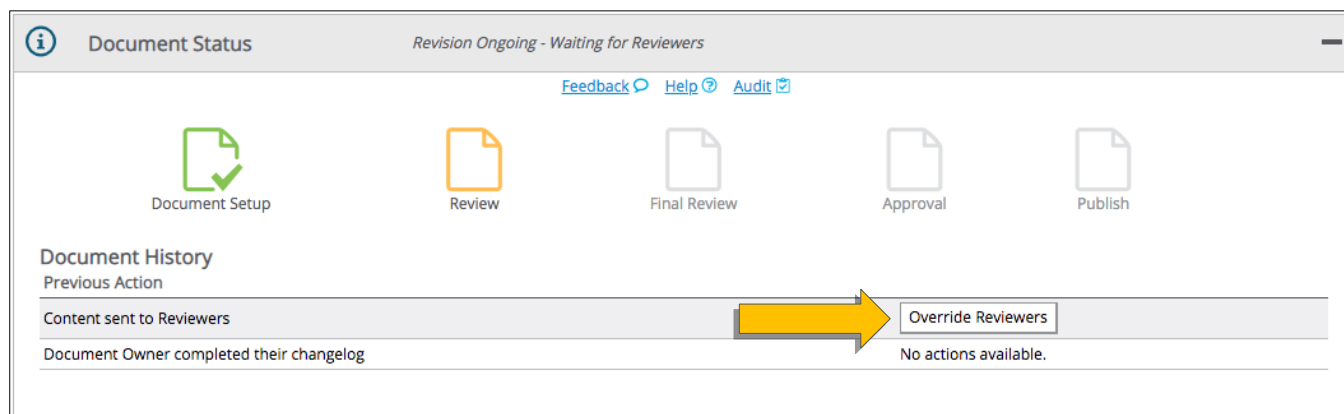
2. Click the **Edit Instructions / Content** button to open the **Add Review Instructions** window. Here you can **Download** or **Change** the document to be reviewed, assign **Publish** and **Review Target Dates**, and **Add Instructions** in the provided text field. Click the **Save** button to save your updates and continue working, or the **Save & Close** button to save and return to the Document Status color bar.



3. Clicking the **Start** buttons below the **Review** or **Final Review** icons will open the Set Target Dates window. Set the **Review Target Date** and the **Publish Target Date**, then click the **Continue** button. The Document Status color bar will display a brief animation as the system sends the document to reviewers.



4. The Document Status color bar will remove the **Start** buttons below the **Review** and **Final Review** icons, and add an **Override Reviewers** button to the Document History section.



- You can click this button to override the review process or any Reviewers who have not completed their review and proceed to Final Review and/or Approval.
- Otherwise, you can wait for reviewers to finish their reviews before proceeding to the **Final Review** (optional) or **Approval** stage.

5. After the **Review** and **Final Review** have been completed by all reviewers, the display will update with new buttons again.

- The **Send** button will return the document to the end of the Document Preparation stage (see step 2.1 on page 4).
- The **Edit Instructions / Content** button will open the **Add Approval Notes** window. The **Revision Overview** tab displays a tree-view of the steps taken at each stage of the review cycle, while the **Add Instructions** tab allows you to **Download** or **Change** the document to be approved, assign **Publish** and **Review Target Dates**, and **Add Instructions** in the provided text field (see step 2.2 on page 4).

**Document Status** *Revision Ongoing - Document Owner Action Required*

Feedback | Help | Audit

Document Setup | Back to Review Preparation | Review | Final Review | Draft | Approval | Publish

Send | Edit Instructions/Content | Request Approval

**Document History**

Previous Action	
A candidate has been created for approval	No actions available.
Content sent to Final Reviewers	No actions available.
Document Owner completed their changelog	No actions available.
Reviewers were overridden by Barbara Dodd	No actions available.
Document Owner completed their changelog	No actions available.
Content sent to Reviewers	No actions available.
Document Owner completed their changelog	No actions available.

**Add Approval Notes for 'Policies & Procedures'**

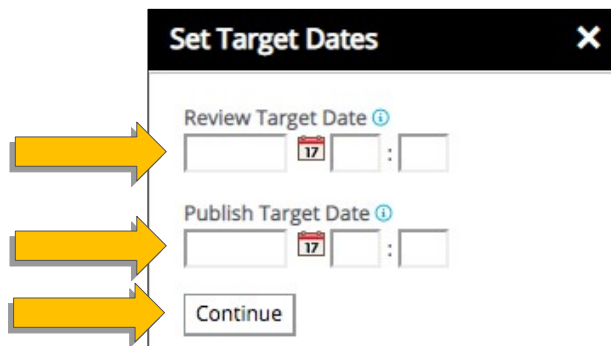
Revision Overview | Add Instructions

Document Name: Policies & Procedures | Identifier: PROC.SPEC.007

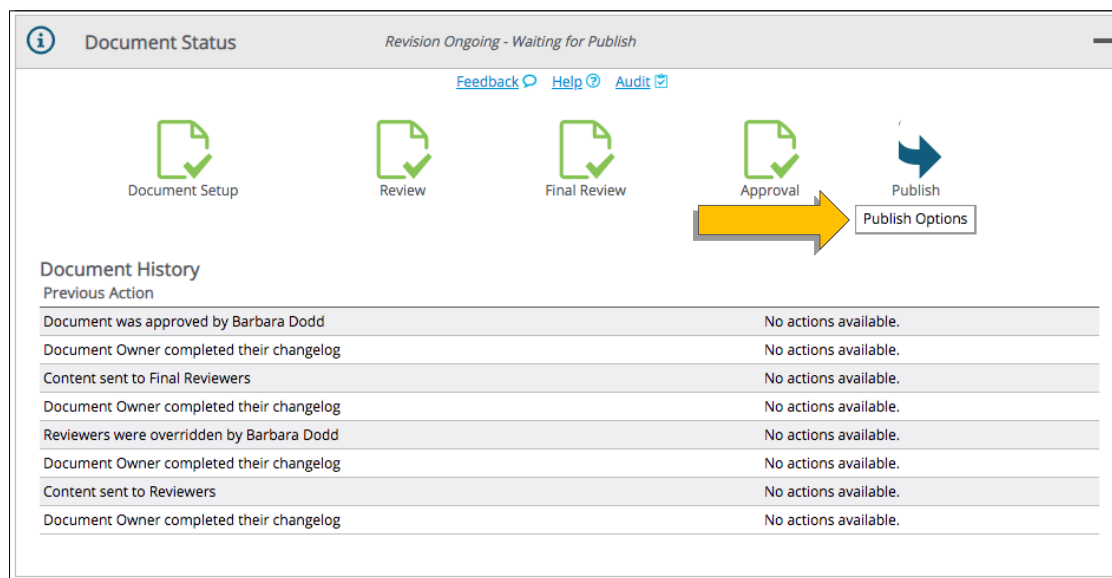
Review Cycle	Assigned	Role	Status	Comment	Attachment
1	Barbara Dodd	Owner	Complete	no comment	<a href="#">Download</a>
1.1	Tracy Bell	Reviewer	Reviewer Removed	no comment	[not set]
1.2	Jose Zavala	Reviewer	Reviewer Removed	no comment	[not set]
1.3	Barbara Dodd	Reviewer	Complete With No Changes	no comment	[not set]
2	Barbara Dodd	Owner	Complete	no comment	<a href="#">Download</a>
2.1	Barbara Dodd	Reviewer	Overridden	no comment	[not set]
3	Barbara Dodd	Owner	Complete	no comment	<a href="#">Download</a>
3.1	Barbara Dodd	Final Reviewer	Complete With Minor Changes	<a href="#">view</a>	[not set]
4	Barbara Dodd	Owner	Candidate For Approval	no comment	<a href="#">Download</a>

5. (continued)

- Click the **Request Approval** button to open the **Set Target Dates** window. Set the **Review Target Date** and the **Publish Target Date**, then click the **Continue** button.



6. After the document is approved, the Document Status color bar will display a **Publish Options** button. Click this to open the **Publish Document** window.



7. Select whether to require acknowledgment of the document by acknowledgment list members and the date that the document should be published, then click the **Publish** button to complete publication.

