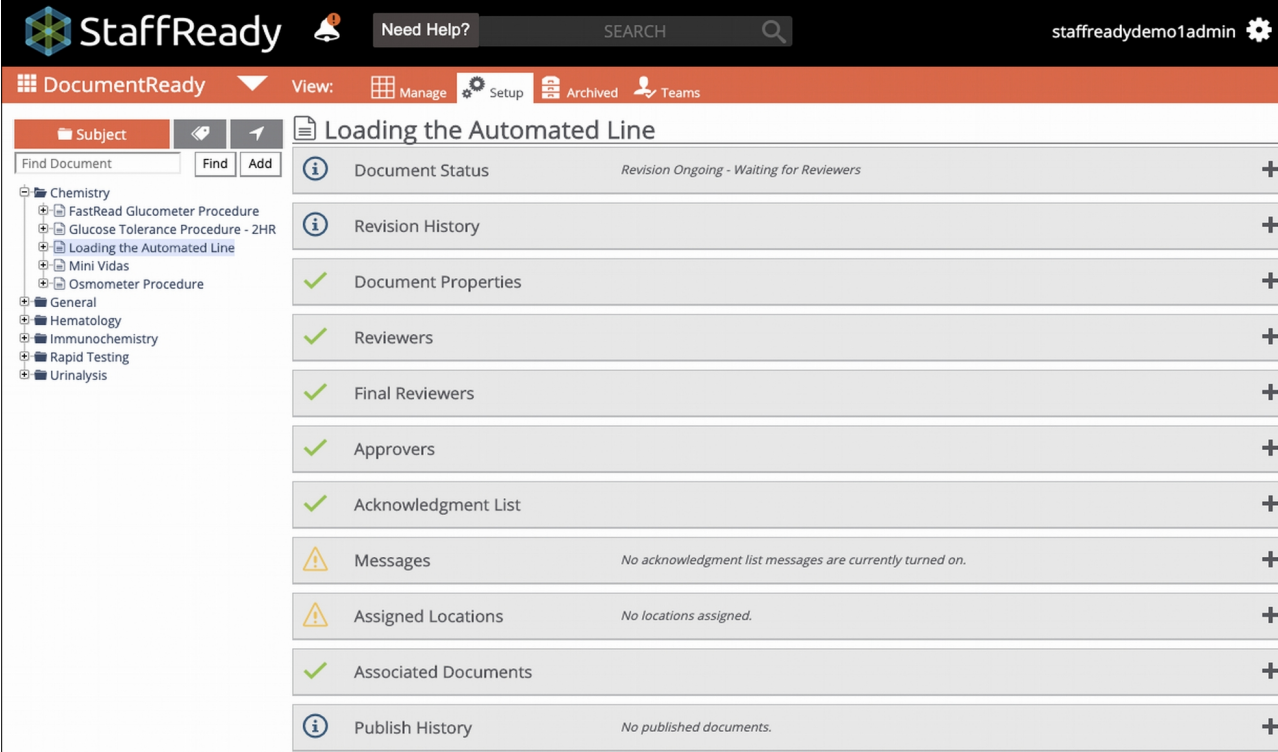


## DocumentReady - Setup View

### Reviewers Color Bar

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

- [Adding a Document Reviewer](#)
- [Adding a Reviewer Team](#)
- [Removing a Document Reviewer](#)
- [Changing or Removing Review Teams](#)



The screenshot displays the StaffReady DocumentReady interface. The top navigation bar includes the StaffReady logo, a search bar, and the user name 'staffreadydemo1admin'. Below this is a secondary navigation bar with 'DocumentReady' and 'View:' options for 'Manage', 'Setup', 'Archived', and 'Teams'. 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 lists various document categories, with 'Loading the Automated Line' selected. The right side of the interface shows a 'Reviewers Color Bar' with the following items:

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

## 1 | Adding a Document Reviewer

### Adding Reviewers to a Document

The **Reviewers** color bar displays employees who are assigned to review a document. The document owner can add or remove individual **Reviewers** and/or **Review Teams** for the document.

Follow these steps to add a **Document Reviewer**:

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

2. There are two ways to add a **Reviewer**:

- Click the **Add Reviewer** link.
- Click the **Add Reviewers** button

The screenshot shows the DocumentReady interface. The top navigation bar includes 'DocumentReady', 'View:', 'Manage', 'Setup', 'Archived', and 'Teams'. The main content area displays the document 'Loading the Automated Line' with a status of 'Revision Ongoing - Waiting for Reviewers'. A sidebar on the left shows a tree view of documents, with 'Loading the Automated Line' selected. The 'Reviewers' panel is open, showing an 'Add Reviewers' button and a table of reviewers. A yellow arrow points to the 'Add Reviewers' button, and another yellow arrow points to the 'Add Reviewer' link in the table.

**DocumentReady** View: Manage Setup Archived Teams

**Subject** Find Document Find Add

**Loading the Automated Line**

- Document Status *Revision Ongoing - Waiting for Reviewers* +
- Revision History +
- Document Properties +
- Reviewers +

**Reviewers**

[Add Reviewers](#)

Reviewer Team [Hawthorne](#) Location Review Teams [Off](#)

[Feedback](#) [Help](#) [Audit](#)

Name	Email	Team/Site Team	Add Reviewer
Megan Gross	mgross@staffready.com	No	Remove
Jana Massey	jmasey@staffready.com	No	Remove
Andrea Charles	acharles@staffready.com	No	Remove
Lester Schwartz	lschwartz@staffready.com	Yes	
Arturo Brewer	abrewer@staffready.com	Yes	

## Adding Individual Reviewers from the Add Reviewer Link

**Method One:** Clicking the **Add Reviewer** 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 **Reviewer** without sending them an email notification, click the **Add Reviewer Without Email** button.

2. To add the **Reviewer** and generate an email notification, click the **Generate Email** link.

3. Confirm the email address, message subject and body, and signature, then click the **Add and Send Email** button.

**Add Reviewer** [X]

Employee\* ⓘ

[ ] Add Reviewer Without Email or [Generate Email](#)

**Add Reviewer** [X]

Employee\* ⓘ

Barbara Dodd Add Reviewer Without Email or [Generate Email](#)

Email Address\* ⓘ

bdodd@staffready.com

Subject\* ⓘ

You've been invited to access a StaffReady Document

Body\* ⓘ

Hello Barbara Dodd|

You've been added as a Reviewer.

Signature\* ⓘ

Sincerely,  
StaffReady

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

Add and Send Email

## Adding Reviewers using the Add Reviewers Button

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

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

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 with categories like Chemistry, General, Hematology, etc., and "Loading the Automated Line" is selected. On the right, there are several sections: Document Status, Revision History, Document Properties, and Reviewers. A yellow arrow points to the "Reviewers" section, which has a green checkmark and a plus sign.

2. Click the **Add Reviewers** button.

The screenshot shows the "Reviewers" configuration page. At the top, there are links for Feedback, Help, and Audit. Below that is the "Add Reviewers" button, highlighted with a yellow arrow. The page shows the current Reviewer Team as "Hawthorne" and Location Review Teams as "Off". A table lists the current reviewers with columns for Name, Email, and Team/Site Team, along with an "Add Reviewer" link and a "Remove" button for each row.

Name	Email	Team/Site Team	
Megan Gross	mgross@staffready.com	No	Remove
Jana Massey	jmasey@staffready.com	No	Remove
Andrea Charles	acharles@staffready.com	No	Remove
Lester Schwartz	lschwartz@staffready.com	Yes	
Arturo Brewer	abrewer@staffready.com	Yes	

## Adding Reviewers using the Add Reviewers Button

3. To add employees from a specific department, enter the department name in the **Find employee or department** search field and click the **Find** button.

Click the **Select All Employees** link next to the desired department...

... or chose individual **Reviewers** by clicking the **Select Employee** link associated with the desired employee.

**Add Employees**

Department

Find employee or department   [Show All Departments](#)

<input type="checkbox"/> Clinic	<a href="#">Select All Employees</a>
<input type="checkbox"/> Core Lab	<a href="#">Select All Employees</a>
<input type="checkbox"/> North Main	<a href="#">Select All Employees</a>
<input type="checkbox"/> StaffReadyDemo	<a href="#">Select All Employees</a>

Department

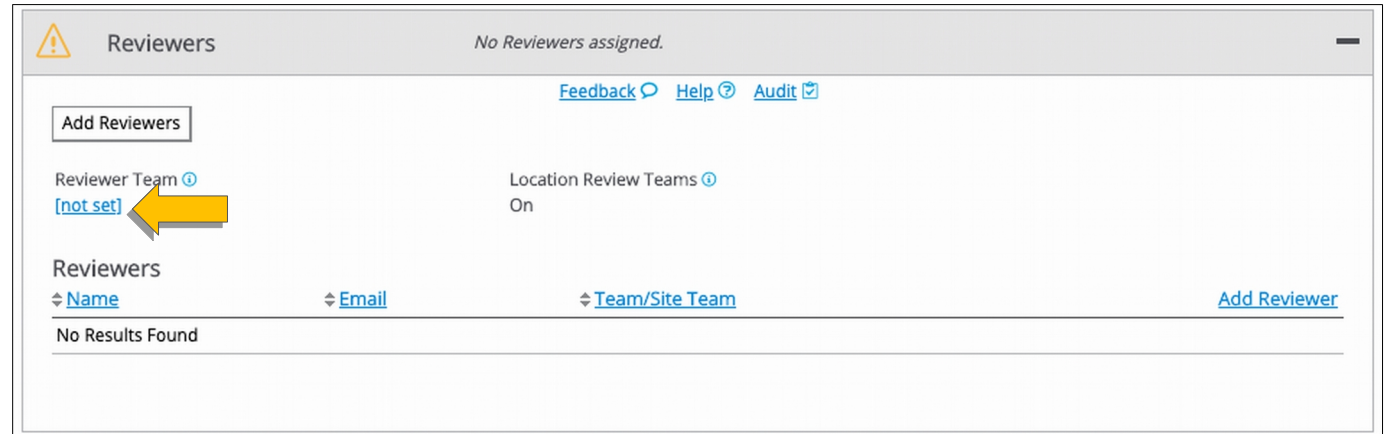
Find employee or department   [Show All Departments](#)

<input type="checkbox"/> Clinic	<a href="#">Select All Employees</a>
<input checked="" type="checkbox"/> Core Lab	<a href="#">Select All Employees</a>
<input type="checkbox"/> Adrian Osborne	<a href="#">Select Employee</a>
<input type="checkbox"/> Andrea Charles	<a href="#">Select Employee</a>
<input type="checkbox"/> Bernadette Martin	<a href="#">Select Employee</a>
<input type="checkbox"/> Chris Paul	<a href="#">Select Employee</a>
<input type="checkbox"/> Danielle Garrett	<a href="#">Select Employee</a>
<input type="checkbox"/> Danny White	<a href="#">Select Employee</a>
<input type="checkbox"/> Ellie Pope	<a href="#">Select Employee</a>
<input type="checkbox"/> Ellie Sumner	<a href="#">Select Employee</a>
<input type="checkbox"/> Emma Bowers	<a href="#">Select Employee</a>

## 2 | Adding a Reviewer Team

### Adding Reviewers using Review Teams

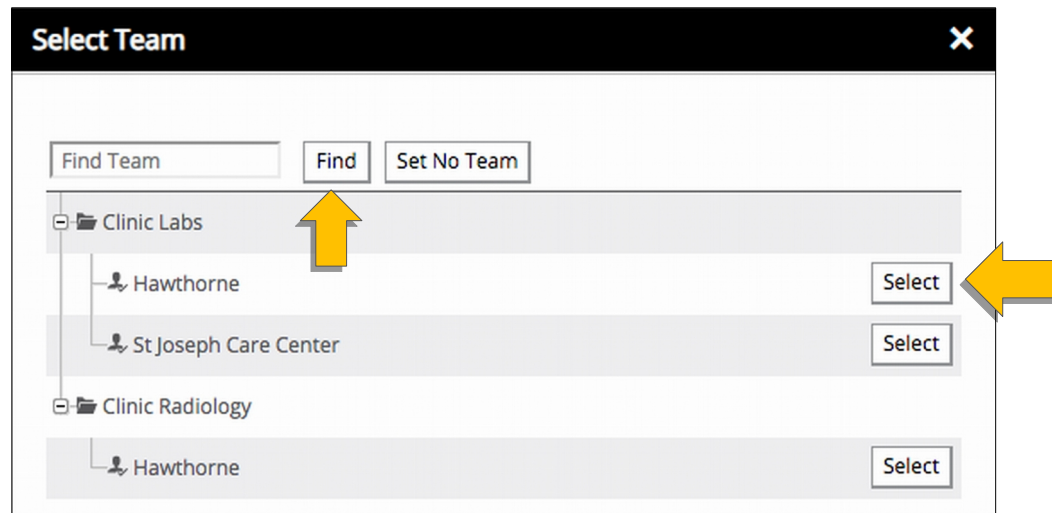
1. Click the **[not set]** or current **Reviewer Team** link.



The screenshot shows a window titled "Reviewers" with a warning icon and the text "No Reviewers assigned." Below the title bar are links for "Feedback", "Help", and "Audit". A button labeled "Add Reviewers" is visible. The "Reviewer Team" dropdown menu is currently set to "[not set]", with a yellow arrow pointing to it. To the right, "Location Review Teams" is set to "On". Below this is a table with columns for "Name", "Email", and "Team/Site Team", and an "Add Reviewer" link. The table currently displays "No Results Found".

2. To find the team you wish to review a document, enter the team name in the **Find Team** search field and click the **Find** button.

Click the **Select** button next to the desired Review Team.



The screenshot shows a "Select Team" dialog box with a search field labeled "Find Team" containing the text "Hawthorne". A yellow arrow points to the "Find" button. Below the search field is a list of teams with "Select" buttons next to them. The teams listed are:
 

- Clinic Labs (expanded)
  - Hawthorne (with "Select" button)
  - St Joseph Care Center (with "Select" button)
- Clinic Radiology (expanded)
  - Hawthorne (with "Select" button)

 A yellow arrow points to the "Select" button next to the Hawthorne team under Clinic Labs.

### 3 | Removing a Document Reviewer

#### Removing Reviewers from a Document

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

The screenshot shows the DocumentReady interface. At the top, there's a navigation bar with 'DocumentReady', 'View:', 'Manage', 'Setup', 'Archived', and 'Teams'. Below this is a 'Subject' bar with a search field and 'Find' and 'Add' buttons. A sidebar on the left lists categories like Chemistry, General, Hematology, etc., with 'Loading the Automated Line' selected. The main content area shows document details: 'Document Status' (Revision Ongoing - Waiting for Reviewers), 'Revision History', 'Document Properties', and 'Reviewers' (highlighted with a yellow arrow).

2. Click the **Remove** button next to the **Reviewer** you'd like to remove.

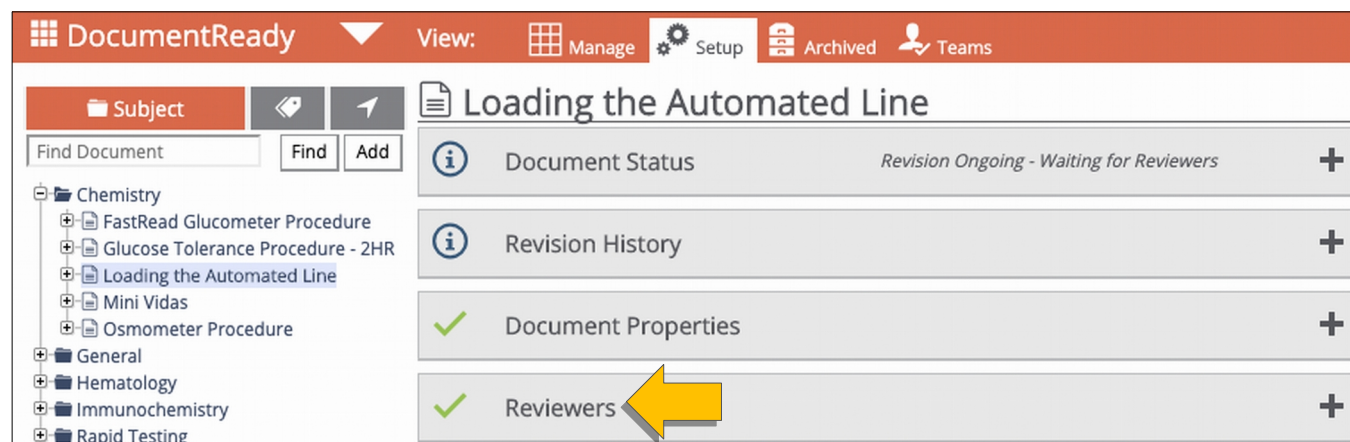
The screenshot shows the 'Reviewers' panel. It includes an 'Add Reviewers' button, 'Reviewer Team' (Hawthorne), and 'Location Review Teams' (Off). Below is a table of reviewers with columns for Name, Email, and Team/Site Team. Each row has a 'Remove' button. A yellow arrow points to the 'Remove' button for Arturo Brewer.

Name	Email	Team/Site Team	Add Reviewer
Megan Gross	mgross@staffready.com	No	Remove
Jana Massey	jmasey@staffready.com	No	Remove
Andrea Charles	acharles@staffready.com	No	Remove
Lester Schwartz	lschwartz@staffready.com	Yes	
Arturo Brewer	abrewer@staffready.com	Yes	Remove

## 4 | Changing or Removing Review Teams

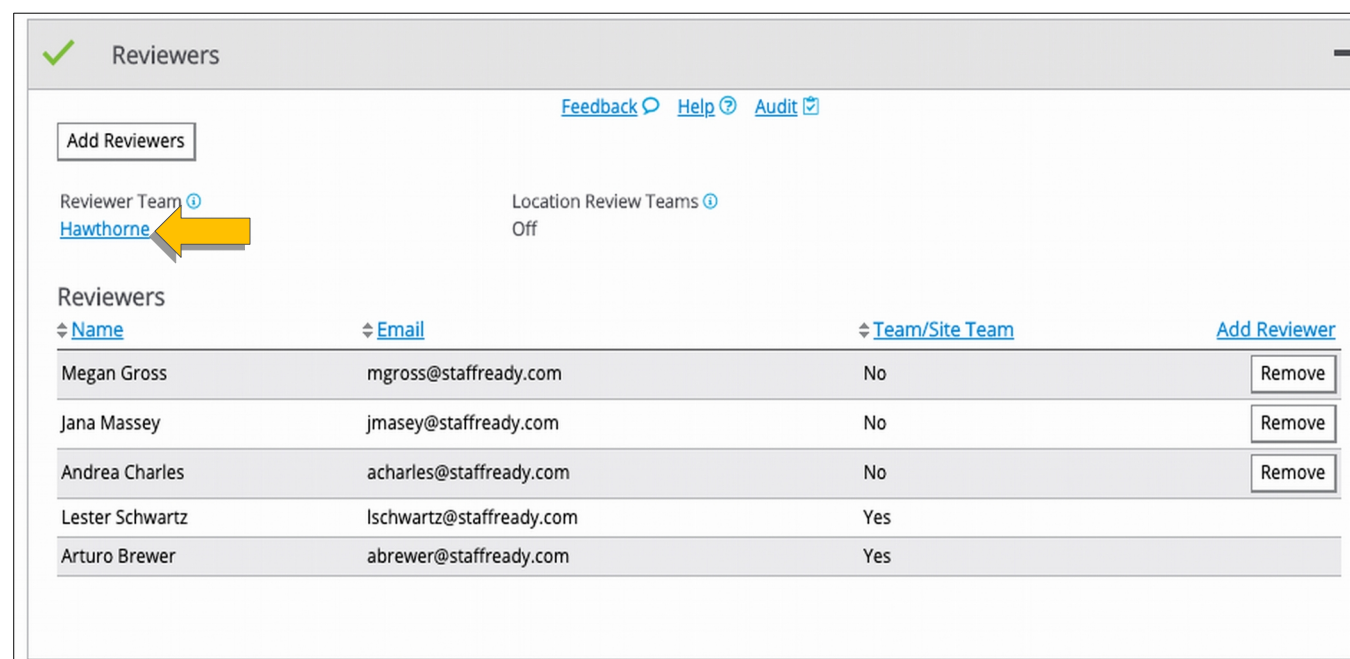
### Change or Remove Review Teams from a Document

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



The screenshot shows the DocumentReady interface. The document title is "Loading the Automated Line". The document status is "Revision Ongoing - Waiting for Reviewers". The document properties are visible, including "Revision History", "Document Properties", and "Reviewers". A yellow arrow points to the "Reviewers" section.

2. Click the **Reviewer Team** link.



The screenshot shows the "Reviewers" section. The "Reviewer Team" is set to "Hawthorne". The "Location Review Teams" are set to "Off". A table lists the reviewers with their names, emails, and team/site team status. A yellow arrow points to the "Reviewer Team" link.

Name	Email	Team/Site Team	Add Reviewer
Megan Gross	mgross@staffready.com	No	Remove
Jana Massey	jmasey@staffready.com	No	Remove
Andrea Charles	acharles@staffready.com	No	Remove
Lester Schwartz	lschwartz@staffready.com	Yes	
Arturo Brewer	abrewer@staffready.com	Yes	

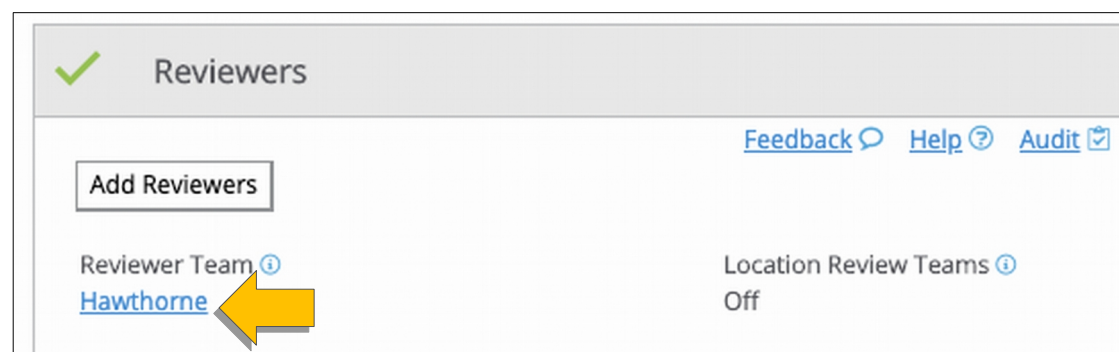
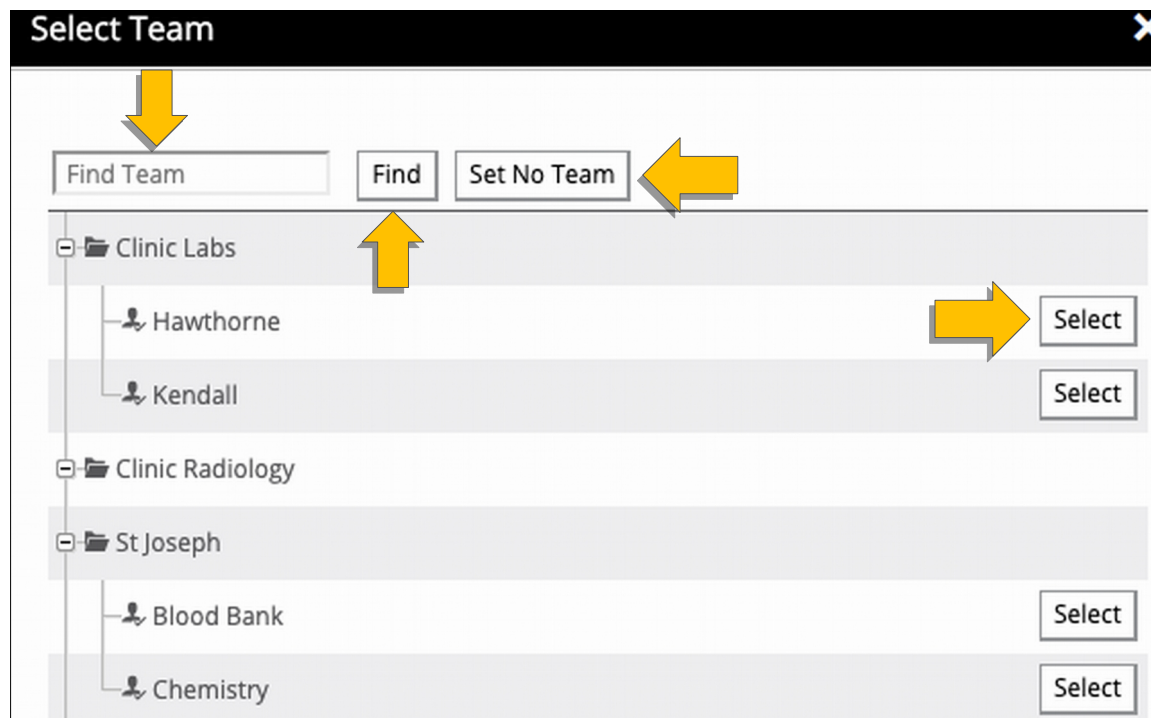
## Change or Remove Review Teams from a Document

3. To find the **Reviewer** team you wish to change or remove from document review, enter the team name in the **Find Team** search field and click the **Find** button.

a. If you want to remove the current **Reviewer** team, click the **Set No Team** button.

b. If you want to find a new team search...then click the appropriate **Select** button.

**NOTE:** Updates will be saved and displayed automatically.



## 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 **Reviewers** color bar or other **StaffReady DocumentReady** features, please contact our Customer Support team:

7am-5pm PST  
Monday thru Friday  
Phone: 1.877.229.5230  
[Online Support Form](#)



<b>DocumentReady Overview &amp; Key Concepts</b>	<a href="#">PDF Document</a>
<b>Adding New Documents</b>	<a href="#">PDF Document</a>
<b>Document Status Color Bar</b>	<a href="#">PDF Document</a>
<b>Revision Tasks Color Bar</b>	<a href="#">PDF Document</a>
<b>Acknowledgment List Color Bar</b>	<a href="#">PDF Document</a>
<b>Acknowledgment Tasks Color Bar</b>	<a href="#">PDF Document</a>
<b>Revision History Color Bar</b>	<a href="#">PDF Document</a>