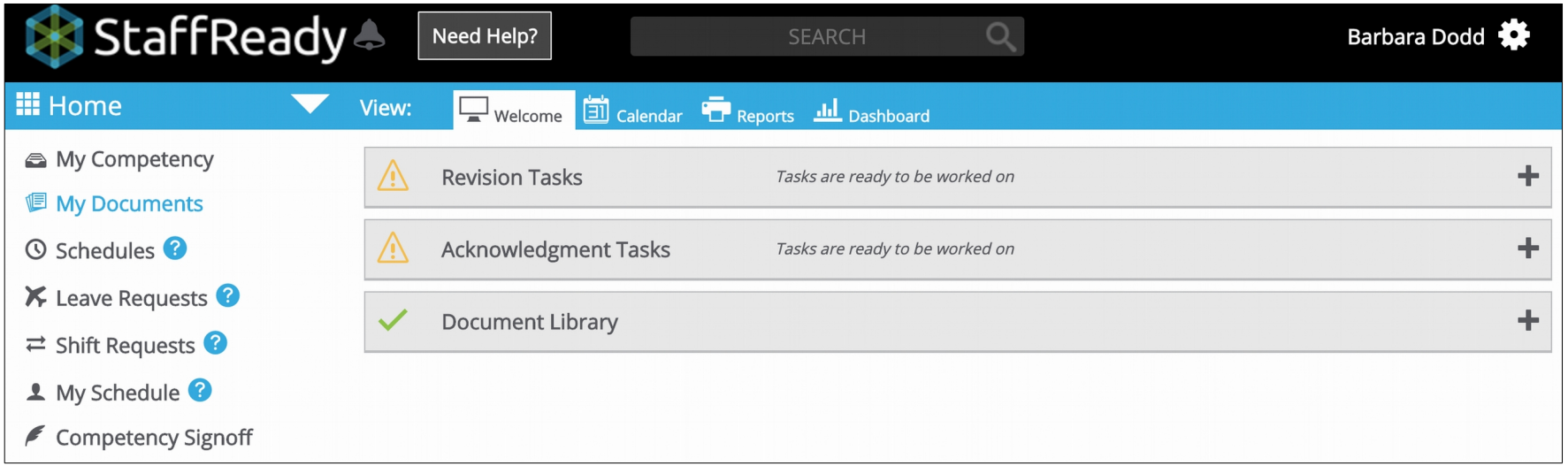
DocumentReady – Welcome View
Revision Tasks Color Bar

This reference guide provides a comprehensive overview of the Revision Tasks color bar used from the Welcome View tab within the DocumentReady module. The following process steps and instructional information are provided in this document:

- **Steps to Complete a Review or Final Review Task**



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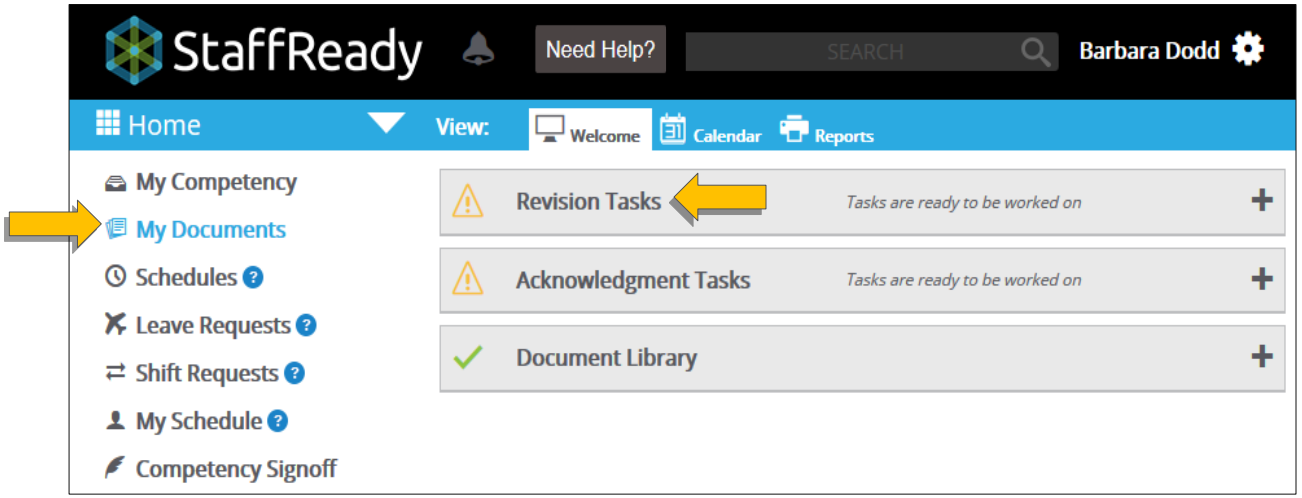
1 | Steps to Complete Review or Final Review Tasks

Completing a Revision Task for a Review Document

***Note:** The same steps are used to complete a **Review** and a **Final Review.**

1. From the Welcome View tab, click **My Documents** from the side menu.

2. Click the **Revision Tasks** color bar to open it.

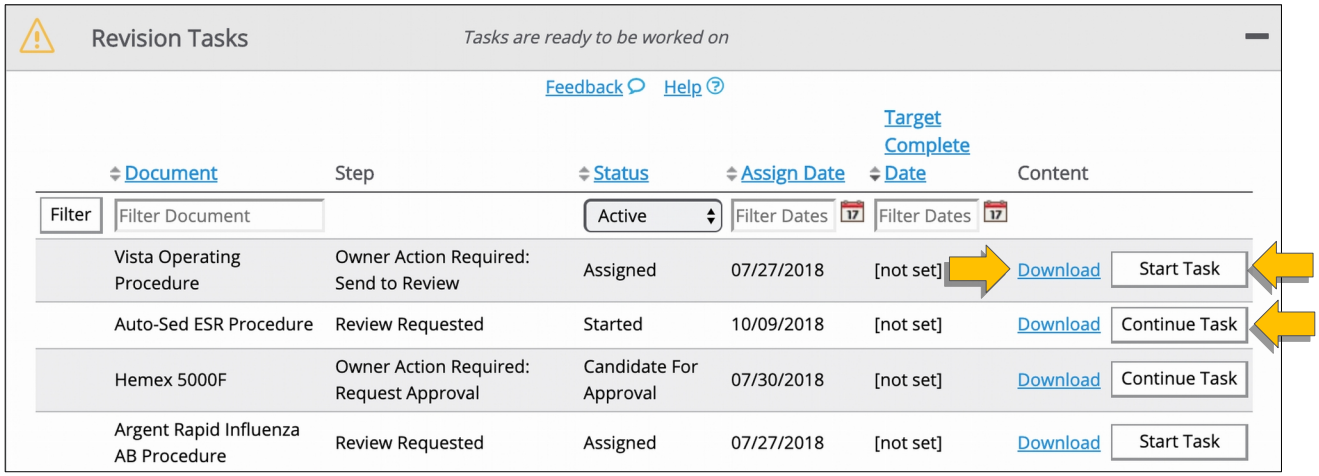


3. To read and update the Document being reviewed, click the Download link associated with the chosen **Revision Task**.

4. Click the **Start Task** button to start the revision process.

5.Click the **Continue Task** button to resume a previously started **Revision Task**.

This will open the **Review For Document '[Name of Document]'** window.



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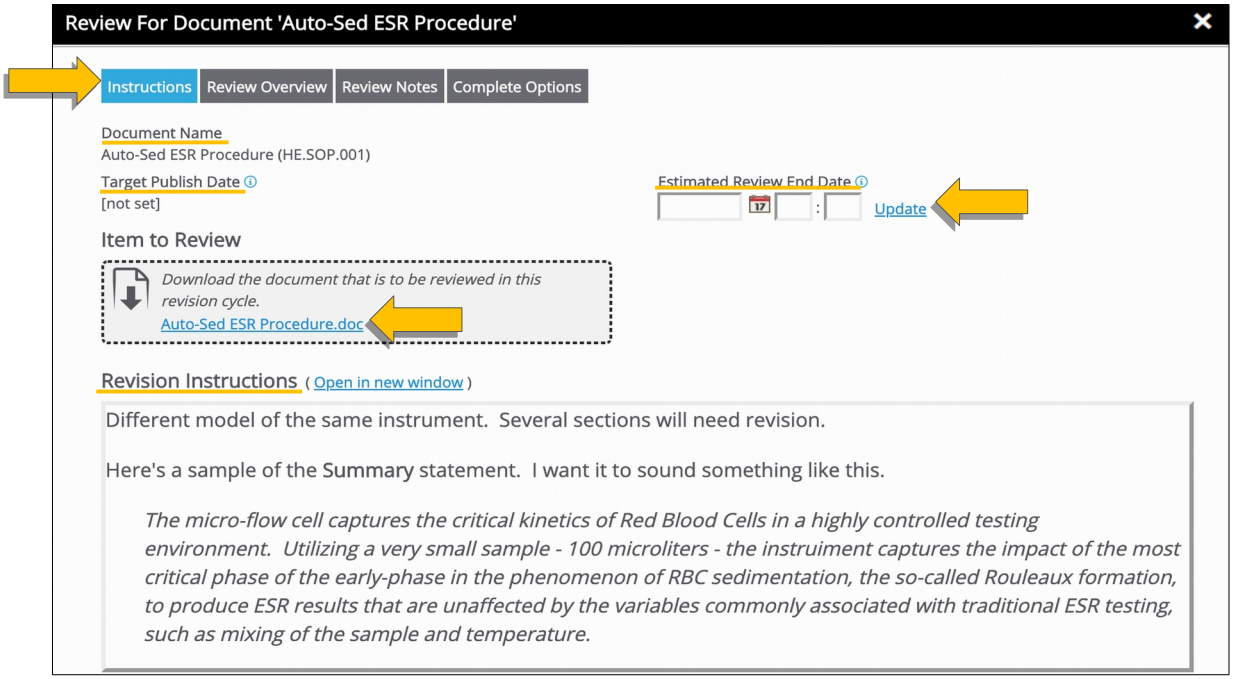
Completing a Revision Task for a Review Document, continued

6. The **Instructions** tab displays the Document Name with the **Classification** in parenthesis, the **Target Publish Date**, and **Revision Instructions**. This window also provides another opportunity to download the document by clicking on the document name link.

7. Enter the **Estimated Review End Date** or choose a date by clicking on the calendar icon.

8. Click the Update link to lock in the **Estimated Review End Date**.



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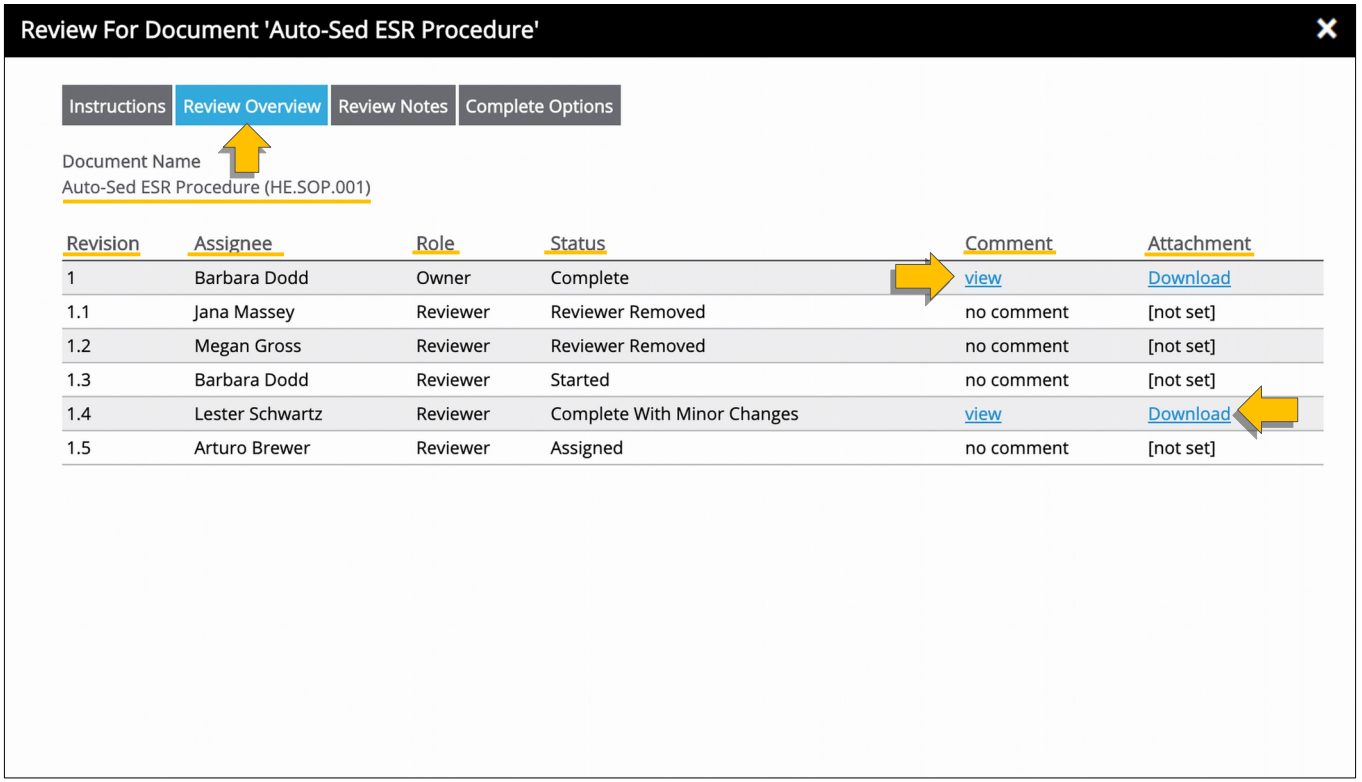
Completing a Revision Task for a Review Document, continued

9. Click the **Review Overview** tab to see the **Document Name** with the Classification in parenthesis and a table which displays the **Revision** number, the **Assignee(s)**, their **Role**, their **Status** on the task, and any **Comments** or **Attachments** that were added in the **Review Notes** section (see step 10).

- A View link will appear in the **Comment** column if the **Assignee** added comments. Click the link to read the comments.
- A Download link will show in the **Attachment** column if an edited version of the document was added by the **Assignee**. Click the link to download and view the revised attachment.



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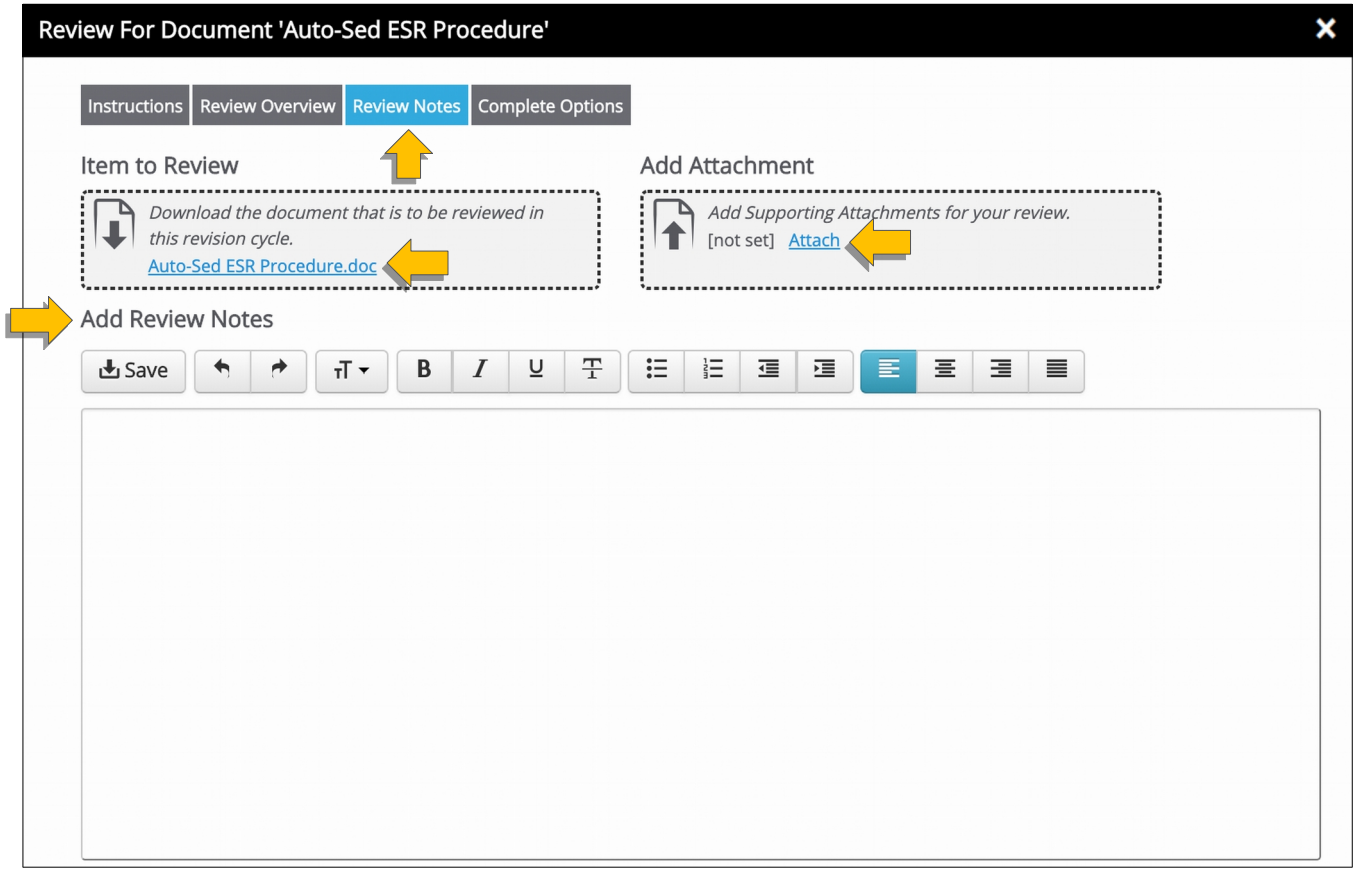
Completing a Revision Task for a Review Document, continued

10. Click the **Review Notes** tab. The **Items to Review** section displays the document(s) being reviewed, and provides another link to download the document(s). Click the Document Name to download the file.

11. Use the **Add Review Notes** text field, to record any recommended and/or required document revisions for the Document Owner to consider.

12. To upload an edited version of the document or other supported documents, click the Attach link in the **Add Attachment** section.



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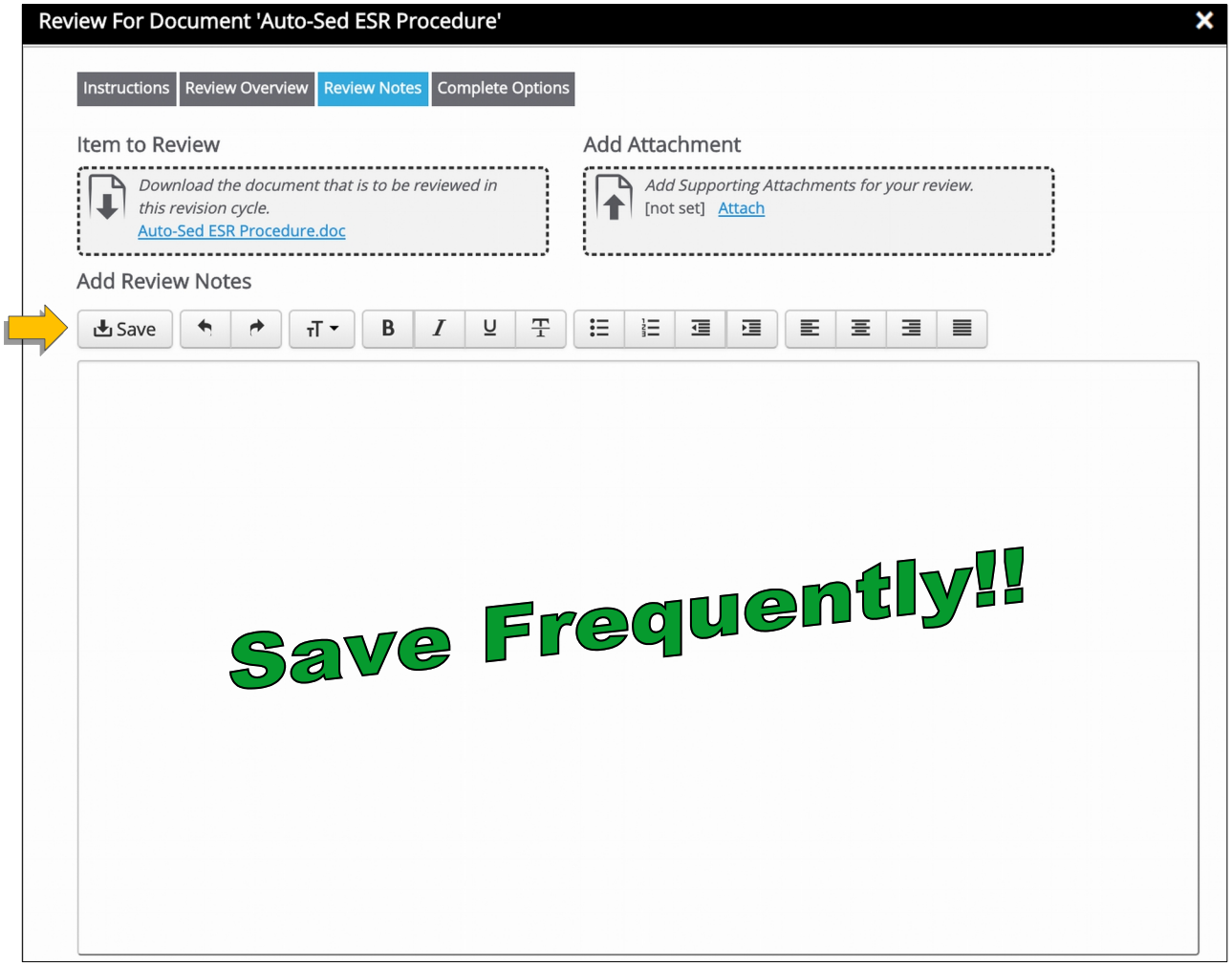
Completing a Revision Task for a Review Document, continued

13. Click the **Save** button to save any added comments.

***Note:** Saving your comments periodically is **highly recommended.** If your StaffReady login session times out, your comments will not be saved.



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Completing a Revision Task for a Review Document, continued

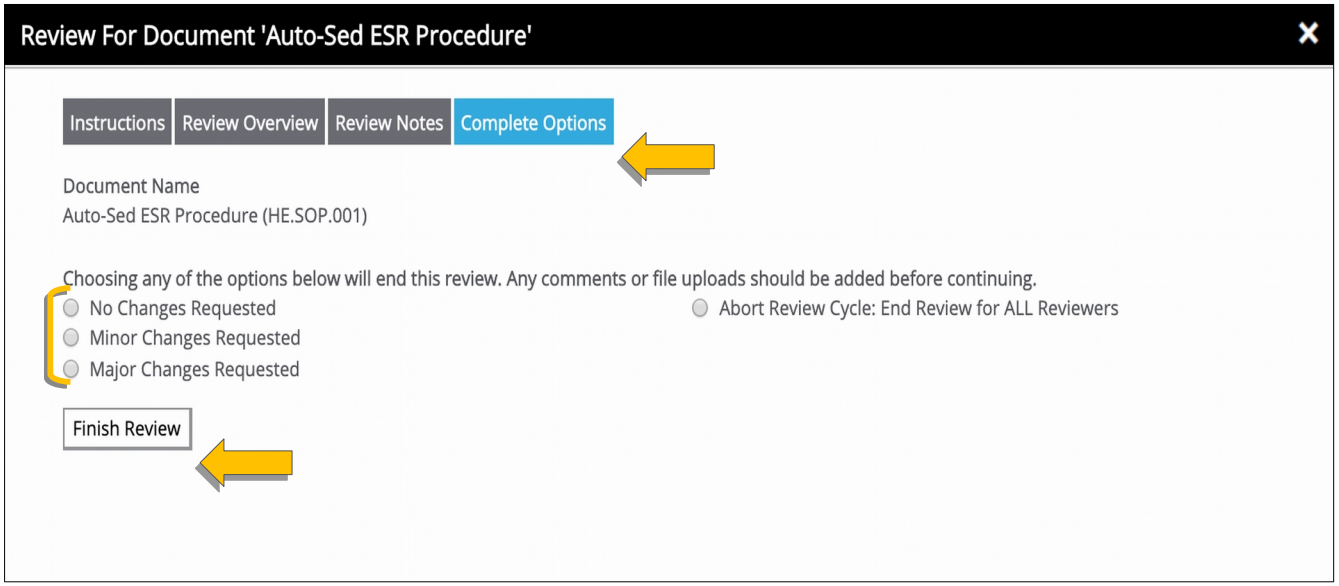
14. Click the **Complete Options** tab to select the final document review action.

15. Choose one of the following review options:

- **No Changes Requested**
- **Minor Changes Requested**
- **Major Changes Requested**
- **Abort Review Cycle: End Review for ALL Reviewers**

  ***Note:** The **Abort** Review **Cycle: End Review for ALL Reviewers** option will immediately end the review cycle for all Reviewers and send it back to the Document Owner for next steps.

15. Click the **Finish Review** button to complete the **Revision Task**. The information will be sent back to the Document Owner for review.



Which Review Option Do I Choose?

No Changes Requested:
- No updates or changes were identified. The Document is ready to be published.

Minor Changes Requested:
- The Document is mostly accurate, but requires minimal updates before it can be published.

Major Changes Requested:
- The Document requires significant updates to its content before it can be published.

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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 **Revision Tasks** 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!

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