RevCom 5.2 Administrator User Guide

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Purpose

This guide presents a detailed description of the RevCom Review and Comment system for use by the RevCom Administrator (Administrator). The *RevCom 5.2* Administrator *User Guide* will help you understand and manage the features and functions of the RevCom process: it explains the document management process, the user and organization administration processes, and the relationships among these parts of the RevCom system.

Introduction

RevCom Overview

RevCom is a Web based review and comment system that enables managers and employees throughout the Department to participate in the review and approval of revisions and additions to the Orders, Notices, Manuals, Guides, Policies (Directives). To facilitate comment entry, comment resolution, and reporting, draft directive documents in RevCom are electronically segmented by paragraph, chapter, or section. Because users record their comments directly online, the RevCom system reduces the amount of time a directive document spends in draft status.

RevCom is a modified workflow system specifically designed for the *controlled collaboration* environment required for policies, procedures, and regulations development. Organizations and individuals are either assigned or invited to participate in various review processes within a pre-defined workflow that manages routing, due dates, and assignments. Draft documents are routed through the system according to a workflow established by either the Office of Primary Interest (OPI) or the RevCom Administrator. RevCom automatically maps the default workflow to the organizational hierarchy, and allows for variations in the depth and breadth of participation for any given document. To facilitate the broadest possible involvement in the review process, each participating office/organization Directives Point of Contact (DPC) has the opportunity to invite its own *subject matter experts* to comment on draft documents, and DPCs have editorial control over the comments from within their organizations. Following editorial review DPCs consolidate the comments from their respective organizations (or offices) before submitting them to the next higher organizational level of review in the system.

Time management is critical to the success of any controlled collaboration process. RevCom provides sophisticated tools to manage and measure the time allotted for each draft document review, including cascading due dates for each “parent” organization and its reporting offices (or “children”). Due dates are automatically set by the RevCom system and must be either met or extended. Administrators, OPIs, and DPCs have the authority to extend due dates for their reporting organizations, and the system keeps track of planned vs. actual (i.e., extended) dates for submission of comments and comment resolution.

Key RevCom features include:

Automatic, electronic notification (e-mail) sent to individual users within assigned DOE (DOE) offices whenever a document is opened for review and comment

Automatic, electronic notification of review and comment due dates

Automatic, electronic reminders for review and comment due dates

A structured, hierarchical DOE review and comment reporting structure with centralized coordination within each office or organization

An *ad hoc* reports module built into the system to allow all users to view all official comments submitted by DOE offices and organizations

The RevCom Workflow Process for Directives Documents

Whenever a draft DOE directive document is issued by ME-43 for review and comment and posted to RevCom, the system sends an e-mail message to all assigned DOE DPCs.

The due dates for each office or individual assigned to review the draft document are automatically established in the system, including all hierarchical levels submitting comments, based on the overall open and close dates set by the Administrator for the review.

The DPC reviews the draft directive document and determines who at his/her office are the appropriate persons for conducting/coordinating the review of and comment on the draft directive document for the office. The DPC has the option of delegating his/her comment coordination responsibilities for each draft.

Either the DPC or the delegate enters the subject matter expert (SME) assignments into RevCom, as necessary.

The DPC or the delegate may reset the office due date (the date delegate and SME comments are due to the DPC), provided the new due date is still within the due date established by the OPI.

If the DPC resets the office due date established by the system, each delegate and SME assigned to the document will automatically be notified via e-mail after the DPC clicks Notify.

SMEs must enter their comments into RevCom by their office due date. RevCom will not accept late comments. Late comments at any level will only be allowed if the next higher level extends the due date.

The DPC reviews and consolidates SMEs' and delegates' comments into a single official comment package for the office and submits the package of official comments either to the OPI or to the office's next higher level, as appropriate. This DPC responsibility cannot be delegated.

RevCom automatically determines where official comments packages are to be routed, based on the organizational hierarchy maintained by the Administrator.

Ultimately, the many final comments packages are consolidated and submitted to the OPI for comment resolution.

The OPI reviews the comments received on the draft and responds back to the participants via RevCom on the resolution of the various issues raised.

To produce a document ready for final clearances and, ultimately, publication, the OPI may post several versions of a document and may assign different workflows and/or reviewers for each version.

DMTEAM proceeds with the issuance of a final version of the document and posts it to the Directives Web site.

Administrator Login and Exit

Login

RevCom allows the coordination of one or more sets of documents (i.e., a document type), each with its own user accounts and workflows. Though the current configuration contains only directive
drafts, other sets of documents may be added at a later date. To begin working with RevCom, go to the **Login** Web page. Clicking on an Administrator task (e.g., Load New Document, Coordinate Reviews) brings up the *Administrator Login* screen.

As an Administrator, a username and password have been provided for you. To login to RevCom, enter your username and password where prompted. Upon successful authentication, the *Administrator Document List* screen will be displayed.

> **Note:** This is the document list from which a document is picked for subsequent actions. The list is divided into sections according to document status *(Being Set Up, Ready, Open for Comment, Comment Resolution, Completed, Cancelled, Withdrawn, or Final)* and shows document ID, Title, and Version for each document.

The following table describes the process for logging in to the RevCom system:

Admin Login To begin any administrative task you must first login.	**1.** Access the RevCom **Login** Web page.
	2. Click on an administrator task (Load New Document, Coordinate Reviews).
	3. The *Administrator Login* screen will open. Login by entering your Admin Username and Password. Both are case sensitive. Click the Login button or hit enter on your keyboard.
	4. The *Administrator Document List* screen loads showing all documents that have been uploaded into the system by category (Being Set Up, … etc.) and displaying the functions available to the Administrator via the Administrator Menu Bar and associated submenus.

Exit

To exit from RevCom, from the menu bar select **Document >> Exit.**

Getting Started

The RevCom system has a primary Administrator with specific responsibilities to configure the software at the beginning. The instructions for these preliminary tasks are found at the end of this user guide because they are used infrequently. These responsibilities include setting up the organizational structure, the DPC and the other Administrator accounts, the system labels, and comment labels. Please refer to the sections **Managing Organizations and Users** and **Administrator Tools** for the details. This Administrator is not assigned to any organization, but rather is the administrator account that is created for a given Document Type during RevCom installation. As such, this account can be modified only by the RevCom Administrator using the RCAdmin Utility available at <RevCom-URL>/rcAdminLogin.html.

The RevCom system also allows for any number of other Administrators, each of whom is assigned to an organization. As the Administrator assigned to a given organization in the RevCom system you have the responsibility to set up activity templates and workflow templates that correspond to your organization's processes. At least one workflow template is required to be set up before the first document can be created in the RevCom system. Please refer to the **Manage Workflows** section for the detailed instructions regarding activity templates and workflow templates.

Working with Documents

Adding a New Document

The Difference between a "Document" and a "Version"

RevCom distinguishes between a "document" and its "versions." Though reviewers, commenters, and DPCs will primarily work with individual versions of each document, they may think of the version as a document, and justifiably so. However, in RevCom, the term "document" is used to refer to the entire set of versions created and reviewed as a document draft evolves. In RevCom, when a user invokes an action on a "document" that action is most often applied to the master record that contains information that is common to all versions (such as the document title) and provides the key to performance measures and reports for the entire document review cycle. As far as RevCom is concerned, one never actually uploads a document to the system – only individual versions get uploaded – but before any versions are uploaded, an Administrator must create the master record that keeps track of each version.

Create a New Document Record

Each time you create a new *document* record in RevCom, the system prompts you for identifying information that will be used for all activities in the workflow and subsequent versions of the document that you will upload. Here you assign the workflow to use by enacting a workflow template.

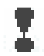
The following table describes the process for creating a new document record in the RevCom system:

Creating a Document Record Setting up the master file for one or more versions of a draft document.	**1.** Click on the *Document* menu and select **New**.
	2. Type in the document Title. Assigning a unique identifier (ID) to the record is optional, though recommended. (Suggestions for the ID include using the draft directive□ number.) In the *Document List* and elsewhere in the system, the document will be listed as *Document ID Document Title Version Name*. (The version title is entered on a subsequent screen, the A*ctivity Status* screen.
	3. Click on the radio button next to the named workflow template you are going to use. Refer to the **Create Workflow Templates** section if the workflow template you want is not yet created.
	4. Click on the **Create** button to save the record to the system, or click **Cancel** to stop this operation and return to the Document List screen.
	5. The system automatically takes you to the *Workflow Status* screen.

Note: The Ad Hoc workflow is one you create at the time of document creation instead of choosing an existing workflow template. It cannot be saved as a workflow template for later use.

Once you have created a new document record you can work from the *Workflow Status* screen to set up the activities in your workflow. The *Workflow Status* screen displays the workflow graph. If you chose the workflow from a workflow template, you will have activities displayed with the status of each activity within the workflow.

Here is a summary of the activity status you can see in the workflow graph.

 An activity displaying this icon requires immediate attention. The workflow is stopped until this activity is acted upon.

 An activity displaying this icon needs to complete setup or is waiting for the date to open.

 An activity displaying this icon means the activity is currently in progress.

 An activity displaying this icon means the activity has completed.

 An activity displaying this icon means the activity was cancelled.

Refer to the Workflow Templates section for the basic instructions on how to set up a workflow using the workflow graph.

You add activities to the workflow using the workflow graphic ‘add activity’  icon. Enter the name for a new activity and click Create, or select an existing activity template. The workflow graphic refreshes displaying the named activity. Click on the activity box to set up the activity.

Using the ‘branch’  icon, you may branch the workflow to specify activities that are performed in parallel or concurrently. You can add additional branches to an existing branch, by using the ‘add branch’  icon, to indicate multiple activities that are performed in parallel or concurrently.

You may select any activity to work on by clicking on the activity box in the workflow graph. The *Activity Status* screen will open. Refer to the next eleven subsections for a description of each activity setup task.

The workflow starts with the first activity open date, which is if the first activity has completed set up. If all the activities in the workflow are set up and there are no date conflicts (that is, a previous activity must complete before a subsequent activity can begin), the workflow will continue on its own.

Activity Status

Here you can modify the activity name, if needed. You can enter the activity description if there is not one or modify the existing description. You can indicate if you would like to use the same author, text file, and original document (i.e., the MS Word, WordPerfect, or PDF version of the original document) in all subsequent activities in the workflow. The Setup Checklist will guide you through the simple steps for preparing an activity of the draft document for review. Some tasks may be preset from the workflow or activity template. A checkmark (√) will indicate that the task is complete.

Set Name – set the name for the activity

Upload Draft – upload a new draft version of a document

Upload Original – upload a copy of the original, unparsed version for reference and printing

Assign Author – tell the system who will be working with this version of the document in the OPI role

Assign Participants – load, define, assign, or change the participants list and review processes for this activity of the document

Set Due Dates – set the due dates for each participant in the review workflow for this activity of the document

Setup Notification – add a text message to the automatic notification that will be sent to each participant in the review workflow for this activity of the document (optional)

As you complete each task in the activity set up, the system will add checkmarks (√) on the Setup Checklist section of the *Activity Status* screen next to each completed task, under the *Completed Tasks* header. A brief summary follows the task button.

Note: All of the functions in the checklist are available while an activity is being set up, and you can change or redo these settings as often as you need to before opening the version for review. Once the version is open for review, however, *only* the **Upload Original** and **Set Review Dates** functions are available. To **change any of the other settings** in the checklist, you must first (1) either reset the opening date for the review to sometime in the future, or (2) cancel or delete the version and start over with a new copy of the version to be reviewed.

Tip: Return to the *Activity Status* Screen at any time by selecting the **Version >> Status** menu option.

Prepare a Version of the Draft Document

Once you have created a new document record you can prepare and upload a version of the draft document. RevCom accepts either a text-formatted version or a Word-formatted version against which the reviewers will be making their comments. RevCom also accepts other formats (PDF, for example) of the draft document as an 'original document' for users to refer to during the review (this is useful when the comments are made against a text version).

Preparing a Word-Formatted Version of the Draft Document

To prepare a Word-formatted version of the draft document, no special steps are required, although there are some features of Word that are not supported by RevCom, and as such, modifications to the draft document may be desired. RevCom does not support the following Word features:

- Word Art – RevCom will accept images within a draft document, but only if they are created outside of Word and inserted as pictures using the "Insert Picture" menu item and choosing either "Clip Art" or "from File".

- Rotated Text – RevCom will upload rotated text but it cannot display it in rotated format; as such, the alignment of rotated text may not show up as expected

- Automatic Numbering – RevCom cannot recognize the numbers generated by the Word automatic numbering feature so they won't be displayed after uploading. For section titles, a section number can be added manually during the parsing process.

- Returns in Table Cells – RevCom does not retain return characters within table cells, so the formatting within table cells that have returns may not display as expected. This effect can be moderated when a space character or punctuation precedes the return.

Preparing a Text-Formatted Version of the Draft Document

To prepare a text-formatted version of a document for uploading into the RevCom system, follow these steps:

In the original document, make sure that there is at least one blank line (i.e., two carriage returns) at the end of each section (see *Note*, below). RevCom will insert an optional section break wherever it finds two blank lines in the text file.

Save a copy of the draft document in text format, with layout (see *Note*, below).

Note: If you are working with your original source document in Microsoft Word®, you do not need to insert two blank lines after each section if: a) you have installed the option to *Save Text with Layout* in MS Word, and b) the style tags you are using automatically insert at least 6 points of spacing between paragraphs. On the other hand, if you do not have the *Save Text with Layout* option available in the word processor you are using or do not have at least 6 points of white space between paragraphs, you must insert at least two blank lines between sections and/or paragraphs.

To create a text version of a Word document:

1. Open the file in MS Word®.
2. On the **File** menu, click **Save As**
3. In the **File name** box, select the directory where you want to save the new file and enter a new file name. **Note:** Names cannot contain spaces.
4. In the **Save as type** list, click **Text with Layout** (or **Text Only with Line Breaks** if the Layout option is not available), and then click **Save**. MS Word will automatically supply a **".ans"** extension to the filename.

Save a copy of the draft document in Acrobat portable document format (PDF) using the .pdf extension (optional).

Accessory or reference documents such as a document cover letter or other documents relevant to the draft document should also be saved as PDF using the .pdf extension.

Tip: It is best to load a PDF version of the source document and the reference documents for easy printing and viewing of the whole document; however, RevCom will accept other document formats for the source document.

Tip: When editing the text version of the document it is best to use WordPad rather than Notepad.

Upload a Version of the Draft Document

Once you have created the document record and have prepared the version to upload, proceed with the following steps for uploading the version of the draft document to the RevCom system.

Uploading a version of the draft document Posting new draft documents.	**1.** From the *Document List* screen, click on the document name in the Needs Attention section to open the *Workflow Status* screen. Click on **Upload Draft** for the *Upload Draft File* screen.
	2. Determine the upload section to use depending on the format of the version you are uploading: a text file or a Word file.
	3. In the appropriate section enter the file path, or press **Browse** to use a system browse pop up to locate the file you want to upload. After selecting the file, click **Submit** to continue to the *Parse Sections* screen. (See *Parse the Version into Sections* to continue the upload process.)

RevCom allows you to upload as many draft versions of the draft document as you need, but only one per activity. Normally, a new version is added after the review of the previous version is complete; however, the system will allow you to add multiple versions in advance, though only one version per activity.

Note: There are limitations in using the Word upload. The Word upload converter does not handle these Word features: Word Art, vertical text, automatic numbering. The text may be available but the formatting will be lost.

The Word upload converter also does not handle returns within table cells. When creating your Word document it is recommended to use punctuation (such as commas) or spaces before any returns within table cells.

Parse the Version into Sections

RevCom provides you with the capability to define specific sections for review in a particular version of a document. This feature helps reviewers tie their comments to the respective sections where they apply, and helps OPIs review and resolve comments in context. With the RevCom *ad hoc* reporting feature, users can generate reports of all comments on a particular section.

Working with the OPI, select the level of granularity and detail for collecting comments. If you upload a text file, the system automatically inserts a check box for an optional section break at each blank line in the document. If you upload a Word file, the system automatically inserts a check box for an optional section break at each paragraph tag in the document. Section breaks can be inserted wherever there is a check box; however, it is best to consider inserting breaks according to logical information groupings (e.g., paragraph, chapter, section).

Note: You must check at least one section break. The system will ignore any text above the first section break, so you may exclude cover or header text not relevant to the review process by selecting the first section break check box *below* the text you wish to disregard. **To leave an entire document intact with no section breaks, click ONLY in the first check box.**

The following table describes the process for parsing documents:

Parse the version into sections Parsing helps the user associate their comments with the section to which they apply.	**1.** After uploading the text or Word file, the system will display the *Parse Sections* screen. Click in the first check box to indicate the beginning of the first section for review.
	2. A checkmark (√) will appear and a *Section Title* field will open. For a text file upload either type the title for the section or copy and paste the title from the text. For a Word file upload the first 80 characters of the paragraph will be automatically entered in the *Section Title* field. You can modify the section title as needed.
	3. Scroll through the text, selecting where to start each new section for review by clicking in the checkboxes to the left of the first line of text in the new section. In the *Section Title* field next to each checked box, either type the title for each section or copy and paste a title from the text.
	Note: RevCom automatically inserts a check box each time it encounters a blank line in the uploaded text file. If you find you need more check boxes to create section breaks, then you must add blank lines to the original file, resave it as text, and re-upload the file.
	4. Once you have selected all the section breaks, scroll to the bottom of the document and click **Submit** to save your work. The system returns to the *Activity Status* screen.

Note: When you have successfully completed this step, a checkmark (√) will appear to the left of the **Upload Draft** button on the *Activity Status* screen, and the number of parsed sections will appear to the right of the Upload Draft button. Finally, a *Sections List* displaying the section titles also will appear below the Setup Checklist.

Verify Parsed Sections/Paragraphs

To verify the final format of the document, scroll to the bottom of the Activity Status screen, scroll down to the *Sections List* and click on a section title to open each parsed section.

> **Note:** Each document is automatically assigned an *Overall Comments* section at the end of the document.

The *Sections List* menu functionality allows the Administrator to:

Select a Section – Click on the section title to view the actual text of the section; click on the *Select a Section* link in the section view to return to the *Sections List.*

Previous Section – When viewing a section, click on this link to move to the previous parsed section in the *Sections List*

Next Section – When viewing a section, click on this link to move to the next parsed section in the *Sections List*

The following table describes the process for verifying the section(s) title(s), verifying the final format of the parsed document, reviewing parsed paragraphs, and viewing the document from the user's perspective:

Verify Paragraphs Check paragraph titles and content and make corrections if necessary.	**1.** From the *Activity Status screen*, scroll down to the Sections List.
	2. Click on a section title to open a section view screen containing the section title and content.
	3. To change a Section Title or the parsing structure, click on *Select a Section* to return to the *Activity Status screen*.
	4. Click on the **Sections** button to the right of the **Upload Draft** button.
	5. Change the Section Title by entering in a new title. Change the parsing by selecting (or deselecting) a checkbox.
	6. Scroll to the bottom of the document and click on **Submit** to return to the *Activity Status screen*.

> **Note:** When you have successfully completed this step, a *New sections successfully parsed* message appears above the administrator/user information. In addition, checkmark (√) will appear to the left of the Upload Draft button, and the number of parsed sections will appear to the right of the Upload Text button. Finally, a Sections List of the section titles also will appear below the Setup Checklist.

Adding Survey Questions

RevCom allows OPIs and administrators to create survey questions for any section of any version of a document. Responses to survey questions allow you to immediately garner statistical, financial, analytical, etc., data from the reviewers by adding multiple choice, multiple selection, and estimated cost (numeric value) questions to individual sections.

The Administrator has the following survey option fields:

No Field – (Default) To opt not to add a survey question

Checkbox – To allow users to select one or more checkboxes when responding to your question (e.g., "Check all that apply")

Radio Button – To compel users to select one answer from a list of possible answers to your question (i.e., multiple choice questions)

Numeric – To require an answer in numeric format (e.g., "What is the estimated implementation cost of this requirement for your organization?")

The following table describes the process for adding surveys and questionnaires to a parsed document:

Collect Survey Data and Questionnaire Information	**1.** From the *Activity Status screen*, click on the **Sections** button to the right of the **Upload Draft** button to open the *Edit Sections* screen.
Obtain survey information from users.	**2.** Click on the *Survey Question Type* drop-down list to create a survey question for the selected section. (The default setting is "no question.") Select from *Checkbox, Radio Button,* or *Numeric.* The survey question form opens.
	3. Enter the survey question in the *Title* box.
	4. Enter the first choice (survey answer) in the *Choice One* box.
	5. To add additional choices, click the **Add Choice** button.
	6. To add the same survey question to every parsed section of this version of the document, click the **Copy to All** button.
	7. When survey questions have been added to all applicable paragraphs, scroll to the bottom of the document and click **Submit** to return to the *Activity Status* screen.

Upload Original Document (Optional)

Uploading the original document is an optional step in the RevCom Administrator workflow, though highly recommended. Many users will prefer to print the draft document for review, and then return to RevCom to make their comments. By uploading a PDF or other version of the draft document, you will provide them with a version of the draft that can be easily printed with all formatting intact.

The following table describes the process for uploading the original document file or to enter the URL for the original file.

> **Note:** If you are using a web address to link to the original document, be sure to test the URL in your web browser before submitting it to the system.

Upload Original Upload the original draft document file or enter the URL for the file.	**1.** From the *Activity Status* screen, Setup Checklist section, click on the **Upload Original** button.
	2. To enter a URL: Enter the URL for the original file in the File URL form and click **Submit**. You are returned to the *Activity Status* screen. To enter a file path: Enter the file path, or press **Browse** to use a system browse popup to locate the file. Click **Upload**. You are returned to the *Activity Status* screen.

> **Note:** When you have successfully completed this step, a checkmark (√) will appear to the left of the Upload Original button.

Assign OPI

You can assign the OPI for the document version being set up by either selecting from the list of OPIs with accounts in the system or by creating a new user account for the OPI. Be sure that the OPI organization has been set up before you create a new user account. (See the Managing Organizations and Users section for details.)

> **Note:** Prior to assigning the OPI, you must first have created a user account for the OPI you wish to assign and then selected a version of a document to work on.

The following table describes the process for assigning the OPI to a document.

Assign Author Assign the OPI to a document.	**1.** On the *Activity Status* screen, Setup Checklist section, click on the **Assign Author** button.
	2. To assign the OPI from existing RevCom OPIs, scroll through the list of OPIs and click on the OPI to assign to the document activity.
	3. The system will make the assignment and return you to the *Activity Status* screen.

> **Note:** When you have successfully completed this step, a checkmark (√) will appear to the left of the **Assign Author** button on the *Activity Status* screen, and the OPI's name will appear to the right of the button.

Assign or Change the Participants

The *Assign Participants* function specifies the review phases and organizations assigned to review a document version. Each organization that you have set up in the system should have at least one DPC associated with it. (If there is an organization without the DPC, the organization cannot be selected to participate in any review, and neither can any of its child organizations.) You need only select the organizations you want to participate in the review process for the document activity.

As Administrator, you can identify the review phases and select workgroup participants from the organizational hierarchy. (To name and save a workflow configuration for use with other document versions you need to use the **Tools >> Manage Participants** feature.)

Use the *Assign Participants* screen to assign workflow participants or to select a Saved Workflow. The *Assign Participants* screen is divided into three sections followed by two buttons:

Saved Participant List– Load a participant list from a list of saved participant lists

Phases – Indicate the review phases that the selected document version must go through:

1. *Review* – All versions go through the review phase. During the review phase, workflow participants have the opportunity to review the version and make comments. In addition to making their own comments, DPCs consolidate and edit comments from their subordinate organizations.
2. *Response* – Following the review phase, the assigned OPI responds to comments submitted by the DPCs at the top of the organizational hierarchy.

Activity Participants – Select the organizations that will participate in the review process. If you select a subordinate organization (i.e., one that sends comments through another organization on their way to the OPI), the “parent” organization(s) will automatically be selected.

> **Note:** Selecting a child organization causes the parent organization(s) to be checked up the hierarchy. Deselecting a parent organization causes deselecting of child organizations down the hierarchy.

3. Choose **Select All** to assign all organizations/offices to the activity; **Clear All** will deselect all organizations/offices in the participant list.
4. Under *Select Levels,* click in the checkboxes to indicate how much of the organizational hierarchy will participate in the review of this version.

Two buttons – The Assign button to assign the contents of the *Assign Participants* screen to the document version and the Back button to cancel the task and go back to management of this activity.

The following table describes the processes for creating an Ad Hoc participant list to assign to a document activity and for creating and using a Saved Participant List.

Assign Participants Specify the review phases and the organizations and/or offices that will be assigned to review the document.	**1.** Click on the **Assign Participants** button to open the *Assign Participants* screen. Optionally, from the menu bar select **Version >> Assign Participants** to open the Assign Participants screen.
	2. To assign a Saved Participant list to a document version/activity, click on the drop-down list and select a participant list by name. Click the **Load** button. Otherwise skip to **Step 4.** To create an *ad hoc* participant list or to edit a saved participant list that you have loaded, scroll to the Activity Participants section and continue with **Step 3.**
	3. Use the group checkboxes to • select all members of the hierarchy or • select members based upon their levels within the hierarchy. You may also scroll through the hierarchical listing and use the individual checkboxes to select or deselect individual organizations and/or offices (and their associated hierarchical line of reporting).
	4. To assign the selected participants to the document activity, click on the **Assign** button. A "Participants List created" message will appear at the top of the *Assign Participants* screen.
	5. The system will return you to the *Activity Status* screen.

Note: If you have successfully completed this step, a checkmark (√) will appear to the left of the Assign Participants button on the Activity Status screen, and the designated document phase and number of organizations participating appears to the right of the button.

Establish the Review Dates and Start the Activity

To start the activity-- that is, open a document version for comment -- you must first set the open and close dates for the review period. If the activity includes a response phase for comment resolution, you must also set a resolution close date, which will determine when the OPI's responses to comments are due.

- *Open Date* – the date the document workflow activity will open for comments from all reviewers. The open date defaults to the date the document version was uploaded/parsed. You may change this default date to any date in the future.

- *Close Date* – the last date to submit comments on the document version

- *Resolution Close Date* – the last date for the OPI to respond to comments

You can set the number of days prior to the local due date that RevCom will send e-mail to remind the commenters if their packages have not yet been submitted.

You can also set the default number of days to allow for comment entry between each level in the organizational hierarchy to allow time for subordinate organizations to review, edit, consolidate, and submit comments to their parent organizations. RevCom will automatically adjust the due dates for comments from subordinate organizations by the number of days you enter. You can either leave the default due dates as they are (DPCs can change the due dates for comments being submitted to them), or manually adjust the due dates for one or more organizations.

Example: You set the final close date to June 26. There are three levels in the organizational hierarchy assigned to the workflow and you set the default number of days between levels to seven (7) to allow a week for each level of the hierarchy to review and submit comments. The system automatically and recursively subtracts seven days from the final due date for each subordinate level.

1. At the top level of the hierarchy – organizations that submit their comments directly to the OPI – the due date remains June 26^{th}.

2. For organizations that submit their comments to top level organizations (i.e., at the next level down in the hierarchy), the due date for their comments to be submitted is set to June 19^{th} (June 26^{th} minus seven days).

3. Comments from the third level in the organizational hierarchy will have to be submitted by June 12^{th} (June 19^{th} minus seven days).

Once you click on the **Set Dates** button, the due dates for the selected document version are set throughout the system based upon the hierarchy and the number of days indicated between each branch of the hierarchy. If one of the Administrators later changes one of the due dates, the change is propagated throughout the system, as appropriate.

Be aware that dates of activities in the workflow cannot overlap unless they are parallel activities. The earliest start date of an activity or a set of parallel activities cannot be the same or earlier than the latest end date of the previous activities. The latest end date for an activity or a set of parallel activities cannot be the same or later than the earliest start date of the subsequent activities.

Note: Review dates are based upon phases of the document review cycle. Prior to assigning due dates, you must have first used the organization hierarchy to select a participant list and indicate the review phases.

The following table describes the process for setting the review period.

Set Due Dates Set the open and close dates and for each segment of the review process.	**1.** Click on the **Set Review Dates** button to open the *Document Due Dates* screen. Optionally, from the menu bar select **Version >> Set Due Dates** to open the *Document Due Dates* screen.
	2. The Open Date default is today's date. To change the Open Date: Click the calendar icon or enter the dates using the MM/DD/YYYY format.
	3. To set the Close Date: Click the calendar icon or enter the dates using the MM/DD/YYYY format.
	4. To set the Resolution Close Date: Click the calendar icon or enter the dates using the MM/DD/YYYY format.
	5. To set notification dates: Enter the number of days before the local due date in the Notify Users box.
	6. To set the number of dates between each level: Enter the number of days in the Review time between review levels box.
	7. Click the **Set Dates** button**.**
	8. If the system determines that there are enough days to satisfy the specified number of levels and days between levels, then the system will refresh the screen and ask for confirmation. Scroll to the bottom of the screen to review the due dates by organization. To make changes to the Open, Close, or Notify, or Review Time dates: • To change the Open Date: Click the calendar icon or enter the dates using the MM/DD/YYYY format. • To change the Close Date: Click the calendar icon or enter the dates using the MM/DD/YYYY format. • To change the notification date: Enter the number of days before the local due date in the Notification box. • To change the number of days between each review phase: Entering the number of days in the Review time between review levels box. If you make any changes here, you must click the **Update** button to save the change. Otherwise change

	either the dates or number of days between levels and click **OK** to return to the beginning of Step 8.
	9. When you are satisfied with the due dates, scroll to the Confirmation section at the top of the screen and click the **Confirm** button to confirm dates and return to the *Activity Status* screen.

Notify Users

The system generates an e-mail message tailored to the role of each user participating in the review.

The OPI e-mail contains:

Document Type

Document Name

Open Date

The date comments are due to the OPI

The deadline date to complete comment resolution (if applicable)

The DPC e-mail contains:

Document Type

Document Name

Open Date

The date comments are due to the DPC’s organization

The date comments are due from the DPC’s organization

Notification of authority to change the date when comments are due to the DPC’s organization

The SME e-mail contains:

Document Type

Document Name

Open Date

The date comments are due to the SME’s organization

You have the option to add text to any or all of the e-mail messages before they are sent. The additional text can be saved for reuse in subsequent messages.

You can also choose to have the system send the document open notification when the document opens (automatic) or only when you click Notify (manual). Notification can be sent at any time after the document opens by clicking the Notify button.

The following table describes the process for notifying the OPI, DPC, and SME.

Notify Due Dates Configure the notifications messages that will be sent when the document workflow activity is open.	**1.** On the *Activity Status* screen, Setup Checklist section, click on the **Setup Notification** button to open the *Notification Setup* screen.
	2. To add additional text to the messages, enter the text in the Text Box. Click in the **Save as Default** check box to have the text you have typed be automatically included in each open document notification (you can change always change or remove this text later). Click on the **Apply** button at the bottom of the screen to save any text you have entered. The system will return you to the *Activity Status screen*.

Note: Adding additional text is optional.

If you do not select the **Save as Default** option, the system will only include the additional text you enter here in notifications for the *document version you are working on.*

When you have successfully completed this step, a checkmark (√) will appear to the left of the Setup Notification button on the Activity Status screen, and a "Messages Set" notification will appear to the right of the button.

Return to this screen to manually initiate Due Dates notification messages after the document opens.

Launch the Review Process

Once all the steps in the *Setup Checklist* have been successfully completed, you can open the document for review and send e-mail notifications to the participants in the review workflow.

The following table describes the process for launching a document for review:

GO Indicate that a document activity is ready to be opened for comment.	**1.** From the *Activity Setup* screen, click on the **GO** button to open the *Document Opening* screen.
	2. To open the document and automatically send notifications on the open date, click **Yes**. To change document settings before continuing, click **No**. Click on the **Submit** button to continue. The system will return you to the *Workflow Status* screen.

Note: When you have successfully completed this step, a "Document ready to be opened" message appears at the top of the *Document List* screen and the document activity has moved from *Needs Attention* to *Waiting* status. The GO button becomes a PAUSE button that you can click to temporarily halt the workflow. Once the due date is active, the document moves from *Waiting* to the *Running* status and the Open Date will be listed on the *Document List* screen.

Upload Reference Documents

Reference documents for any document version can be uploaded using a title and URL or a title and a file path. From the *Document Menu* select **References** to open the *Manage Reference Documents* screen.

The following table describes the process for uploading reference documents files or to enter the URLs for the referenced files.

Note: Be sure to test the URL in a browser before submitting it to the system.

Upload Reference Documents	**1.** From the menu bar select **Document >> References** to open the *Managed Reference Documents* screen.
Upload the referenced document file or enter the URL for the file.	**2.** To enter a URL: Enter the title of the reference document in the *Reference Title* field. Enter a summary or abstract of the content of the reference document in the *Reference Summary* field. Enter the URL (web address) for reference document in the *File URL* field and click **Submit**. You are returned to the *Activity Status screen*. To enter a file path: Enter the title of the reference in the *Doc Title* field. Enter a summary or abstract of the content of the reference document in the *Doc Summary* field. Enter the file path for the document or press **Browse** to use a system browse popup to locate the file. Click **Upload**. You are returned to the *Activity Status screen*.

Select a Document Activity to Work On

Once you have created the document record (see *Create a New Document Record*), you will work on individual activities of the document workflow using the *Workflow Status Screen.* To select an activity to work on, click **Document >> Select** to display the list of all the active workflow activities of documents in the system.

The *Document List*

The *Document List* is organized according to status and identifies draft versions by due date, and a workflow icon, the activity name, the document ID, title and version title. The document list sections are:

Needs Attention : The list of versions that are in the process of being set up for review; may include document records for which the first draft version has not yet been uploaded

Running: The list of activities that are currently in process.

Waiting : The list of activities that are in the process of being set up for review.

Done: The list of documents that have completed their workflow. From documents in this list, you can close out (i.e., withdraw or finalize) the entire document.

Withdrawn: The list of documents that have been withdrawn, along with each of their versions, from all RevCom review processes.

Final: The list of documents that have completed the review cycles for each of their versions.

To select a document activity to work on, click on the document title. The system will display the *Activity Status* screen.

To view the workflow for the document, click on the workflow icon or activity name on the same line as the document title. The system will display the *Workflow Status* screen for the document you select. Click on an activity to bring up the *Activity Status* screen for workflows in process or bring up the Final Comment Report for documents that have been closed out.

Delete Activity

If there is a problem with a document version you uploaded, you can upload new text and new original, if necessary, before a review is open. Otherwise you can delete the activity from the workflow (or Workflow Templates). Activities that are or have been open for comment cannot be deleted.

The following table describes the process for deleting a version:

Delete Version To delete a version before opening for review and comment.	**1.** From the menu bar select **Document >> Select** to open the *Document List* screen.
	2. Click on the workflow icon or the activity name of the document.
	3. Click on the activity in the workflow to work on. On the *Activity* Status screen you can upload new text and new original. Otherwise you can click on the delete icon for the activity.

Note: Once deleted, an activity cannot be restored; however, you may add another activity to the document.

Cancel Version

If there is a problem with a document version that has started the review cycle, you may cancel the review cycle for that document version. This will move the version to the *Cancelled* section of the Document *List* screen. Canceling differs from deleting a version in that comments made on a cancelled version are retained by the system for records management purposes.

The following table describes the process for canceling a version:

Cancel Version To cancel a version that has started the review cycle.	**1.** From the menu bar select **Version >> Cancel** to open the *Cancel Confirmation* screen.
	2. To verify the version cancel choose **Yes** and click the **Submit** button. To cancel the action of deleting the version, choose **No** and click the **Submit** button.

Note: Once cancelled, a version cannot be reactivated for review; however, you may add another version – including a copy of the cancelled version – to the document.

Document Closeout

You may close out a document when all reviews have been completed (the document resides in the Done status on the *Document List* screen) and it is ready for final publication (finalize). This will move the document to the Final section of the *Document List* screen.

You may also close out a document that has the current activity and all subsequent activities cancelled at any time during the review cycle to prematurely end the review of a document. This will move the document to the Withdrawn section of the *Document List* screen.

The following table describes the process for withdrawing a document:

> **Note:** You must first select the document version from the *Completed* or the *Done* section of the *Document List* before attempting to close out the corresponding document.

Document Closeout To close out a document and end the review.	**1.** From the menu bar select **Document >> Closeout** to open the *Document Closeout* screen.
	2. To complete the review cycle for a document ready for publication, choose the **Finalize** button. To prematurely end the review cycle, choose the **Withdraw** button.
	3. A confirmation screen displays prompting for a verification to close out the document. To verify the document closeout choose **Yes** and click the **Submit** button. To cancel the document closeout choose **No** and click the **Submit** button.

> **Note:** The closeout action is irreversible: there is no “undo” for this operation. *Closeout* (withdrawn or finalized) means that no new versions can be added and the document is no longer available for review.

Document History

The document history is a view of the document and each of its versions. It shows the status of each version, the number of accesses to the version, the number of comments for the version by comment type, and the planned and actual dates for each review period, (open for comment, open for resolution, comment period completed, or cancelled).

The following table describes the process for reviewing the document history:

Note: To review the history of a document and its associated versions, you must first select a version of the document from the *Document List*.

Document History To view the document history.	**1.** From the menu bar select **Document >> History** to open the *Document History* screen.

Managing Organizations and Users

Preparing to Create the Organizational Hierarchy

The majority of the tasks associated with Create an Organization are only used once during the initial set up of the document type.

> **Note**: Once documents are in process, users are assigned, and comments are entered, any changes made are propagated throughout the system. Depending on how your agency chooses to define the records management requirements for the system, changes to these settings may cause documents, assigned users, or comments to be inaccessible, except when exported from the system. Caution should be used when using any option within this category.

The RevCom Administrator has the authority to create and manage the relationship among individual organizations' accounts. These relationships define the workflow of the review cycle by determining if, when, and how comments from one organization get routed through another organization – the "parent" – before final resolution by the OPI.

Create Organizations

Before creating individual user accounts, you must first create the organizations/offices to which the users belong. It is best to create the highest level organizations/offices first, then create the lower level organization accounts and relate them to their "parent" organizations.

The following table describes the process for creating an organization and assign the DPC to the organization:

Create an Organization Create organizations/offices hierarchy.	**1.** From the menu bar select **Accounts >> Create Organization** to open the *Create an Organization* screen.
	2. Enter the organization's name, e-mail domain, and parent office in the Create Organization form.
	3. Click the Create button to create the organization, or Cancel to cancel the operation.
	4. Continue this step until the organizational hierarchy is represented in RevCom.

> **Note:** DPC accounts are created at a later time by selecting **Create User** in the *Accounts* menu.

Create DPC Accounts

Once you have created the organization accounts, you should create individual DPC accounts and assign the DPCs to their organizations. DPCs are normally responsible for managing comments for their particular branches of the hierarchy; however, you will likely have at least a few DPCs who do not manage (i.e., edit, consolidate) comments from any other users.

The following table describes the process for creating DPC accounts.

Create DPC **Accounts** Create accounts for DPCs and assign them to their organizations.	**1.** To create an account for a DPC: From the *Accounts Menu*, select **Create User** to open the Create User screen.
	2. Using the Create User form enter the DPC's RevCom user name (blank spaces are not allowed), full name, e-mail address, copy to e-mail address(es), and assign a password.
	3. Select the DPC role radio button.
	4. Choose the **Organization** to which the DPC is assigned.
	5. Click the **Create** button to assign the DPC, or **Cancel** to cancel the operation.
	6. Continue this step until DPCs are assigned to each organization in the hierarchy represented in RevCom.

Note: You can also create DPCs by viewing the user list (Edit/View Users) and selecting each =No DPC Defined= link under the organization names.

Edit and Delete Organizations

The RevCom Administrator can edit information associated with an organization. Changes are propagated through all the documents in the system.

Note: The Administrator can also delete an organization. It is recommended to use this option only during the initial set up if you decide the organization group is not needed. Depending on how your agency chooses to define the records management requirements for the system, changes to these settings may cause documents, assigned users, or comments to be inaccessible, except when exported from the system.

The following table describes the process for editing or deleting an organization:

View/Edit Organizations To update information associated with an organization or to delete information associated with an organization.	**1.** To view an organization: From the *Accounts* menu, select **View/Edit Organization** to open the Organization Tree screen.
	2. Scroll to select the organization to edit.
	3. The *Update an Organization* screen opens. Edit the organization information in the Update an Organization form and click the **Update** button to update the organization.
	4. To cancel an edit: Click the **Cancel** button.
	5. To delete an organization: From the *Accounts* menu, select **View/Edit Organization** to open the Organization Tree screen. Select the organization to delete.
	6. Scroll to the bottom of the screen and click **Delete**.

Edit and View User Accounts

The RevCom Administrator can edit user profile information.

Note: Changes are propagated through all the documents in the system. Depending on how your agency chooses to define the records management requirements for the system, changes to these settings may cause documents, assigned users, or comments to be inaccessible, except when exported from the system.

The following table describes the process for editing or viewing a user account:

Edit/View User Edit existing user profiles.	**1.** To edit the account information of an existing RevCom user: From the *Accounts* menu, select **Edit/View User** to open the Manage Users screen.
	2. Select the user account from the organizational list. Revise the user's name, e-mail, password, or parent organization/office, as appropriate.
	3. Scroll to the bottom of the screen and click the **Create** button to create a new user, or **Cancel** to cancel the operation.

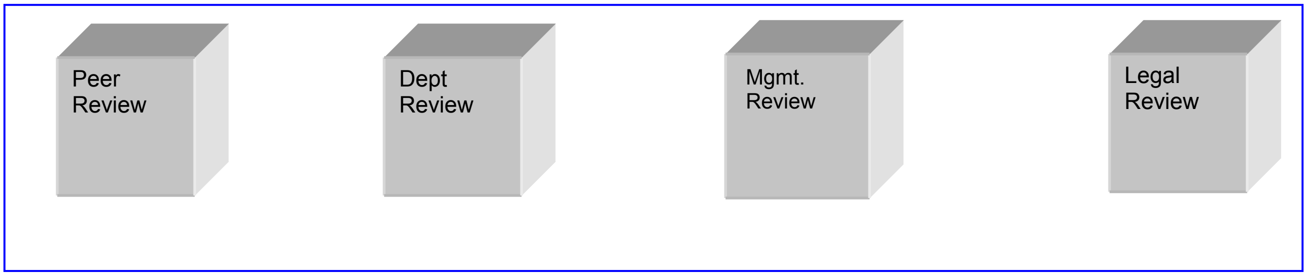
Managing Workflows

The concept of workflow encompasses the entire document review process, from selecting a document to work on to sending the final version for publication. The RevCom Administrators create, save, and reuse complete workflows through a graphical interface that displays the entire process. The individual steps in a workflow are referred to as Activities. Each activity can be preconfigured with specific tasks which must be performed as part of the activity.

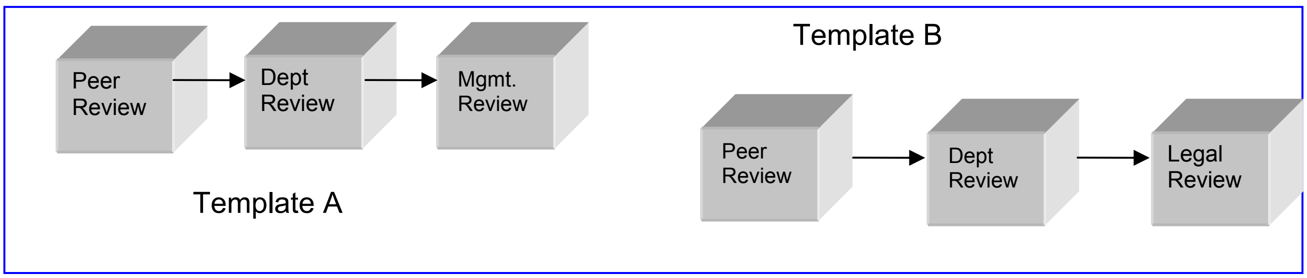
The RevCom Administrators define the various activities in your review processes and set up templates for reuse. You construct configurable activity templates that can then be used to build reusable workflow templates and finally you can enact the workflow by assigning one of the workflow templates to each document set up in the Doctegrity RevCom system.

Workflow templates and Activity templates will be available to all RevCom Administrators in the organization of the RevCom Administrator who create and edit them. The names of the workflow templates must be unique within each organization and the names of the activity templates must be unique within each organization.

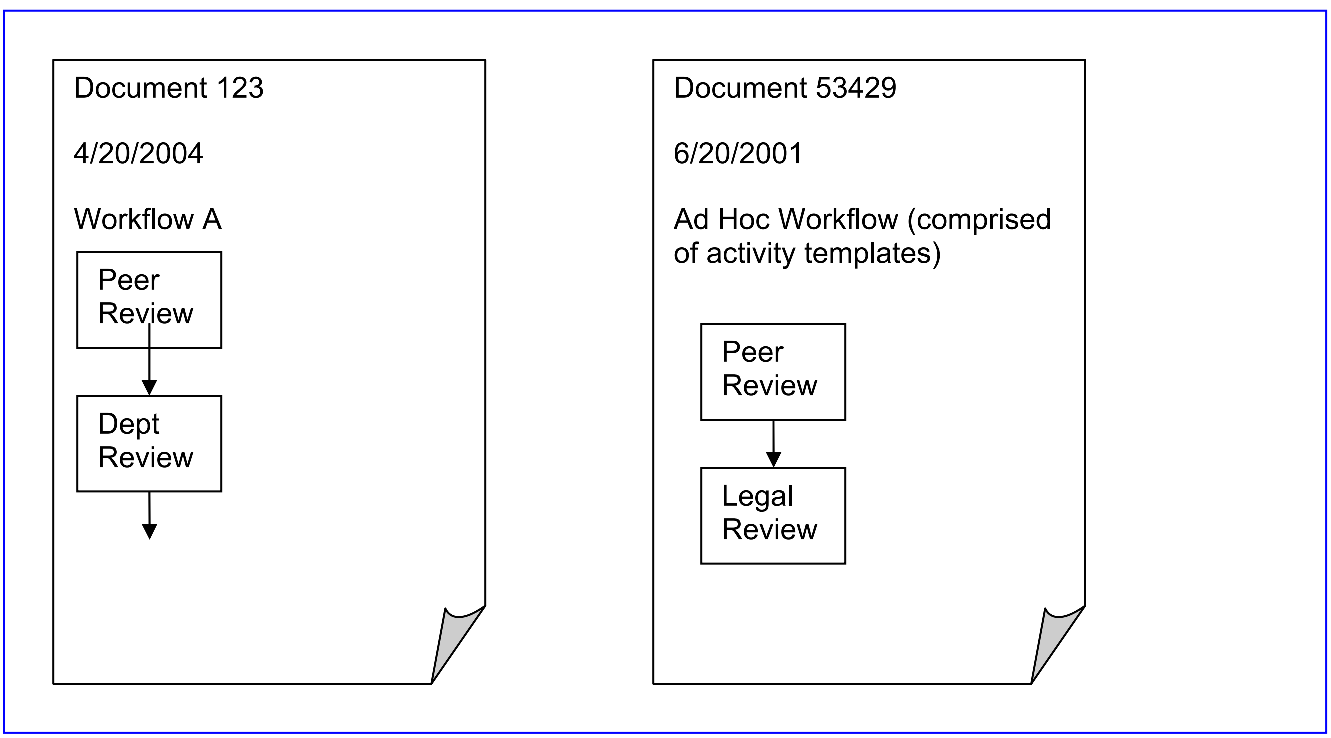
The majority of the tasks associated with Managing Workflows are used mainly during the initial set up of the document type. A conceptual diagram of the activity and workflow templates to the documents is depicted on the following page.



Activity Templates



Workflow Templates

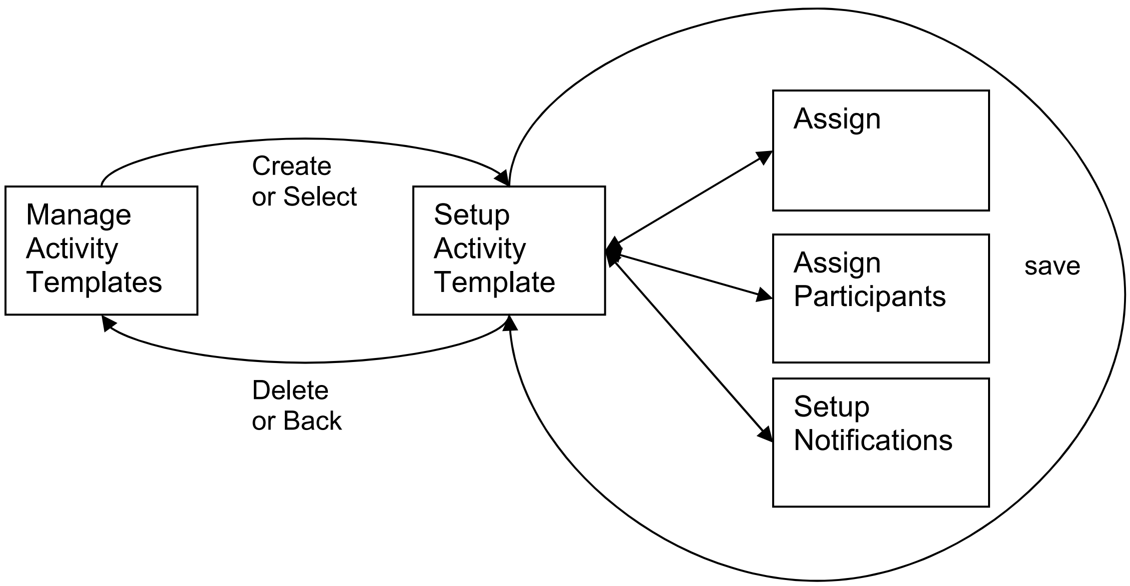


Enacted Workflows (with documents and versions)

Activity Templates

Activity templates are the building blocks for workflows and workflow templates. You can use activity templates to set up your workflow template. Currently we only support one type of activity, the review activity, and therefore we support only one type of activity template. Future enhancements will include multiple types of activities, which might include activity types such as Approval-only, Archiving, or Publishing.

Below is a diagram of the Activity Template screen flow.



Activity Template Page Flow

Create New Template

You can create a new activity template by naming the template. Alternatively, you can create a new activity template from an existing activity template by giving it a different name. The list of existing activity templates is sorted alphabetically by name. If there are no existing templates for your organization, the status line “No existing templates” will be displayed.

The following table describes the process for creating a new activity template:

Create Activity Template Create a new activity template.	**1.** From the menu bar select **Tools >> Manage Activities** to open the *Manage Activity Templates* screen.
	2. Enter the activity template name in the New text box.
	3. Click the Create button to create the activity template and open the *Setup Activity Template* screen.
	4. Alternatively, click on the name of an existing activity template to open the *Setup Activity Template* screen.
	5. Enter a new activity name in the Save as text box and click the Save button.

Note: The existing templates you see are for your organization only.

Setup Template

You can enter a description of the activity template. For review type activities, you may assign an author, identify participants in a review, and set up the e-mail notification templates. These same parameters will be used whenever the template is called.

The description is an optional field, however, in an activity template list a description may be useful in further identifying the template. If you try to create an activity template using a name that already exists for your organization, an error message will display and the template will not be created.

The following table describes the process for setting up an activity template:

Setup Activity Template Setup an activity template.	**1.** Create a new template or click on the name of an existing activity template to open the *Setup Activity Template* screen.
	2. Enter a description for the activity template in the Description text box.
	3. Click on the parameter buttons to set up any parameters you wish to reuse each time the activity template is called. A checkmark will indicate those parameters that have been set up. The status of the parameter will display next to the setup button.
	4. Click the Save button to save the activity template named in the Save as text box.
	5. Click the Delete button to remove the activity template.
	6. Click the Back button to return to the *Manage Activity Template* screen.

Note: You may not delete an activity template that is already in use within a workflow template.

Note: At this time you can change activity template parameters, but not clear the setup.

Edit Existing Template

You can modify an existing activity template by selecting from a list. The list of existing activity templates is sorted alphabetically by name. If there are no existing templates for your organization the status line, “No existing templates.” displays.

Note: Existing templates are visible by your organization only.

The following table describes the process for modifying an existing activity template:

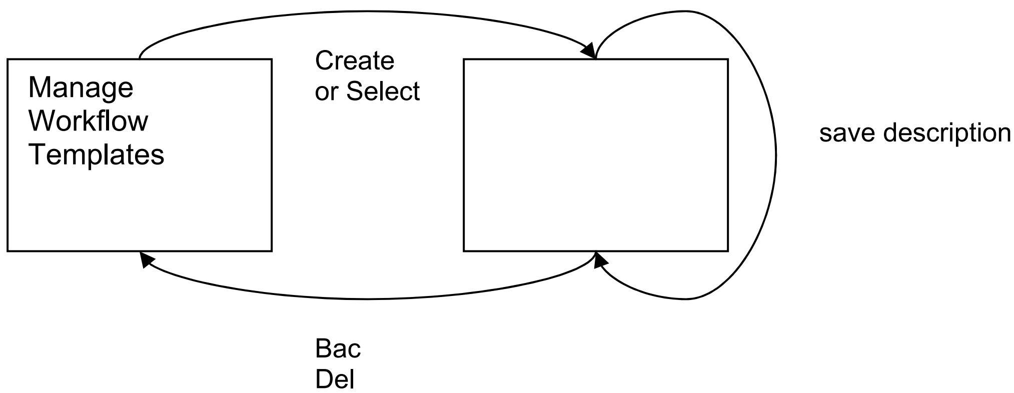
Modify Activity Template Modify existing activity template.	**1.** From the menu bar select **Tools >> Manage Activities** to open the *Manage Activity Templates* screen.
	2. Click on the name of an existing activity template to open the *Setup Activity Template* screen.
	3. Enter any modifications and click the Save button without changing the name in the Save as text box.
	4. Click the Delete button to remove the activity template.
	5. Click the Back button to return to the *Manage Activity Template* screen.

Note: Any changes made to the activity template are reflected wherever the template is used.

Note: At this time you can change activity template parameters, but not clear the setup.

Workflow Templates

Workflow templates are used to assemble the activity templates into review process order so that the policy development life cycle can be conducted consistently. First you create a workflow template and then you set it up using a workflow graph. When a document draft is ready for review you can enact a workflow template.



Workflow Template Page Flow

Create New Template

To create a workflow template, select from the menu, Tools > Manage Workflows. You name the workflow to create it. This takes you to the workflow graph where you begin defining your workflow.

Alternatively, you can also create a workflow template from an existing workflow template by clicking on the name of an existing workflow templates. This takes you to the workflow graph where you can save the workflow as a new workflow name and then modify the workflow for the new review process.

The list of existing activity templates is sorted alphabetically by name. If there are no existing templates for your organization the status line, “No existing templates.” displays.

The following table describes the process for creating a new workflow template:

Create Workflow Template Create a new workflow template.	**1.** From the menu bar select **Tools >> Manage Workflows** to open the *Manage Workflow Templates* screen.
	2. Enter the workflow template name in the New text box.
	3. Click the Create button to create the workflow template and open the *Setup Workflow Template* screen.
	4. Alternatively, click on the name of an existing workflow template to open the *Setup Workflow Template* screen.
	5. Enter a new workflow name in the Save as text box and click the Save button.

Note: The existing templates you see are for your organization only.

Setup Template

Here you begin defining your workflow. First you provide a description (e.g., the purpose of the workflow). The description is an optional field; however, in a workflow template list or an enacted workflow list, a description may be useful in further identifying the template You can choose to accept the parameters set up in the first activity for the author, text, and original to carry throughout the workflow. This takes effect when the workflow is enacted.

You define the workflow process for your organization using the workflow graph. You add activities to the workflow using the 'add activity' icon. Using the 'branch' icon, you may branch the workflow to specify activities that are performed in parallel or concurrently. You can add additional branches to an existing branch, by using the 'add branch' icon, to indicate multiple activities that are performed in parallel or concurrently.

If you try to create a workflow template using a name that already exists for your organization, an error message will display and the template will not be created.

The following table describes the process for setting up a workflow template:

Setup Workflow Template Setup a workflow template.	**1.** Create a new template or click on the name of an existing workflow template to open the *Setup Workflow Template* screen.
	2. Enter a description for the workflow template in the Description text box.
	3. Click the Save button to save the workflow template named in the Save as text box.
	4. Click the Delete button to remove the workflow template.
	5. Click the Back button to return to the *Manage Workflow Template* screen.

Workflow Graph

In setting up your workflow you can erase and redefine by using the delete icon. Using the delete icon next to a branch removes the branch along with any activities on that branch. The activity templates are still available for reuse. The delete icon next to an activity will remove the activity from the workflow. Again, the activity template is still available for reuse.

The following table describes the process for using the workflow graph:

Workflow Graph Use the workflow graph to define the workflow template.	**1.** Click on the Add Activity icon. Enter the name for a new activity and click Create, or select an existing activity template.
	2. The *Setup Workflow Template* screen refreshes with the named activity now in the workflow graph.
	3. Click on the activity box to set up the activity (refer to the **Setup Activity Template** section). Changes here are reflected in all uses of this activity template, including the affected workflows that are listed.
	Note: There is no “Save As” option on this screen.
	4. Click on the Branch icon to create a branch in the workflow.
	5. The *Setup Workflow Template* screen refreshes showing the new branch and the join back together directly following the branch.
	6. Add activities to each branch corresponding to your parallel or concurrent tasks.
	7. Click on the Add Branch icon to add additional branches for three or more concurrent tasks.
	8. Click on the Delete icon next to an activity or next to the branch to remove and redefine the activity or branch.
	9. Click the Save button to save the workflow template named in the Save As text box.
	10. Click the Delete button to remove the workflow template.
	11. Click the Back button to return to the *Manage Workflow Template* screen.

Note: A delete will list those documents where the workflow template has been enacted. Any changes you make to a workflow template are reflected in all uses of that workflow template, except for enacted workflows. Once a workflow is enacted, the only changes it could have are those changes you specifically make to the workflow after assigning it to the document.

Edit Existing Template

You can modify an existing workflow template. The list of existing workflow templates is sorted alphabetically by name. If there are no existing templates for your organization, the status line "No existing templates" will be displayed.

Note: Existing templates are visible by your organization only.

The following table describes the process for modifying an existing workflow template:

Modify Workflow Template Modify existing workflow template.	**1.** From the menu bar select **Tools >> Manage Workflows** to open the *Manage Workflow Templates* screen.
	2. Click on the name of an existing workflow template to open the *Setup Workflow Template* screen.
	3. Enter any modifications and click the Save button without changing the name in the Save as text box to update your changes to the existing workflow template.
	4. Click the Delete button to remove the workflow template.
	5. Click the Back button to return to the *Manage Workflow Templates* screen.

Note: Any changes made to the workflow template are reflected wherever the template is used, except for enacted workflows. Once a workflow is enacted, the only changes it could have are those changes you specifically make to the workflow after assigning it to the document.

Administrator Reports

The Reports Menu and its submenus are used to access various reports in the RevCom system.

Quick Reports

The Administrator can generate predefined reports for a selected document from the Quick Reports.

The following table describes the process for generating a Quick report:

Quick Report View commonly requested predefined reports.	**1.** From the menu bar select **Reports >> Quick** to open the *Quick Report* screen.
	2. A list of predefined reports displays. Click on the link of the report to view.

Custom Reports

The Administrator can generate ad hoc reports for a selected document by generating a Custom Report. Choices for report criteria include type of comment (Major or Minor), organization, levels, resolution, concurrence, and selections to display.

The following table describes the process for generating a Custom Report:

Custom Report Create your own report.	**1.** From the menu bar select **Reports >> Custom** to open the *Custom Report* screen.
	2. Scroll through the screen and select reporting criteria.
	3. Press **Submit** to generate the customized report.

Performance Measures

The Performance Measures report provides document statistics for a six-month period. The report includes data for documents closed out within that six-month period (the begin dates could precede the reporting period).

The Performance Measures report reveals:

Average of the number of days to go from Open to Final for all documents including:

5. The shortest number of days from Open to Final and the document ID associated with this statistic
6. The longest number of days from Open to Final and the document ID associated with this statistic

Average of the number of days in each state of the workflow (measure from the entry into one state to the entry into the next state)

Average of the difference in days between Planned and Actual transition between states of the workflow for all documents including:

The shortest number of days to transition between states and the document ID associated with this statistic

The longest number of days to transition between states and the document ID associated with this statistic

The following table describes the process for generating a Performance Measurement report:

Performance Measures View document statistics for previous six-month period.	1. From the menu bar select **Reports >> Performance Measures** to open the *Performance Measures* screen.
	2. Scroll up and down to review the Performance Measures.

Document Status

The Document Status report lists each document in the RevCom system. This report reveals:

Document Title

Number of accesses to date for each document

Number of comments by:

Total

Major Comments

Minor Comments

Workflow status for each document

Open for Comment

Resolution

Completed

Cancelled

Withdrawn

Final

Planned and Actual dates the document entered (or will enter) each of the workflow states

The following table describes the process for generating a Document Status report:

Document Status View all documents in the RevCom system and their status.	**1.** From the menu bar select **Reports >> Document Status** to open the *Document Status* screen.
	2. Scroll up and down to review the Document Status.

Planner

The Planner report shows a schedule of recent past, current, and near future document reviews with a 3-, 6-, and 12-month Gantt chart view. The schedule is based upon the current date.

The following table describes the process for generating a Planner report:

Planner View document reviews in Gantt chart type layout.	**1.** From the menu bar select **Reports >> Planner** to open the *Document Planner* screen.
	2. Scroll to the left and right to review the Planner.
	3. The *Document Planner* shows three months of data by default. Select either 6 or 12 months and click **Refresh** to show more data.

Administrator Tools

Manage Participants

The participant list specifies the review phases and organizations assigned to review a document version.

As Administrator, you can identify the phases for the review activity, select workgroup participants from the organizational hierarchy, and create and save by name Participant Lists for use with other document activities and versions. The participant list can be selected by name for reuse at a later time in both activity templates and enacted activities.

Use the *Manage Participants* screen to set up participant lists. The *Manage Participants* screen is divided into three sections followed by three or four disposition buttons:

Saved Participant Lists – Load a participant list from a list of saved participant lists

Phases – Indicate the review phases that the selected document version must go through:

1. *Review* – All versions go through the review phase. During the review phase, workflow participants have the opportunity to review the version and make comments. In addition to making their own comments, DPCs consolidate and edit comments from their subordinate organizations.
2. *Response* – The assigned OPI responds to comments submitted during the review phase.

Workflow Participants – Select the organizations that will participate in the review process. If you select a subordinate organization (i.e., one that sends comments through another organization on their way to the OPI), the “parent” organization(s) will automatically be selected.

> Selecting a child organization causes the parent organization(s) to be checked up the hierarchy. Deselecting a parent organization causes deselecting of child organizations down the hierarchy.

1. Choose **Select All** to assign all organizations/offices to the workflow; **Clear All** will deselect all organizations/offices in the workflow.
2. Under *Select Levels,* click in the checkboxes to indicate how much of the organizational hierarchy will participate in the review of the version to which this workflow is assigned.

Disposition buttons – The Save button is clicked to assign the contents of the *Assign Participants* screen to the document version. You can save a new participant list by saving with a different name. The Cancel button is clicked to cancel the task and go back to management of this activity. The Delete button is clicked to delete a loaded participant list from the system.

The following table describes the processes for creating an Ad Hoc Participant List to assign to a document version during workflow setup or activity template setup and for creating and using a Saved Participant List.

Manage Participants Add, edit, and change saved participant lists.	**1.** From the menu bar select **Tools >> Manage Participants** to open the *Manage Participants* screen.
	2. To create an ad hoc participant list: Scroll to the Participants section.
	3. Use the group checkboxes to • select all members of the hierarchy or • select members based upon their levels within the hierarchy. You may also scroll through the hierarchical listing and use the individual checkboxes to select or deselect individual organizations and/or offices (and their associated hierarchical line of reporting).
	4. To save and name the participant list for reuse with document versions (or activity templates), enter a name in the *Save as* field and click **Save**. A "Workflow xxx created" (or "Workflow xxx updated" if it already existed) message will appear at the top of the *Manage Participants* screen where xxx is the name by which the participant list was saved.

System Labels

In the current configuration, RevCom contains three primary roles:

General Commenter: Anyone who uses the system to make comments but is not responsible for coordinating the comments of others

DPC: Anyone locally responsible for compiling, editing, reviewing, forwarding, etc., comments for a group (i.e., either within an organization or at a geographic location, or both).

OPI: Anyone who works with the Directives Management Office (directive
) to revise a draft document for final publication; the primary contact for the document; and the person most likely to be responsible for comment resolution. The OPI responds to the comments that have been sent from the DPCs, then notifies the DPCs that the response package has been posted for review. Optionally, the DPCs then concur (or not) with the responses from the OPI.

RevCom allows Administrators to customize the system to the needs of their organizations by providing organization based system labels (titles) for each of the primary roles. Once the system labels are identified, they are displayed throughout the RevCom system.

The RevCom Administrator can customize the footer for each e-mail message that is sent by the RevCom system. Typically, the footer should contain a sentence containing contact information for the team responsible for the documents (e.g., a name and/or e-mail address).

The following table describes the process for assigning system labels and customizes the e-mail footer:

System Labels Create role labels and e-mail footer.	**1.** From the menu bar select **Tools >> System Labels** to open the *Set Systems Labels* screen.
	2. To edit the titles: Edit the General Commenter, DPC, and OPI system labels by typing the title into the Set System Labels form. To edit the e-mail footer: Type the footer information into the E-mail footer form.
	3. Click the **Update** button to update the labels and return to the *Document List* screen.

Note: If you have successfully completed this step, a “Labels updated” message appears at the top of the screen.

Comments Labels

The RevCom system supports two levels of comments (typically labeled “Major” and “Minor” though you may choose any labels you require). Usually one type of comment addresses content while the other type of comment addresses typographical, spelling, and grammatical suggestions (i.e., editorial changes). In the current configuration, the OPI is required to respond to substantive (Major) comments and responses to editorial (Suggested) comments are optional.

Note: RevCom can be configured to allow more qualifiers, as necessary.

RevCom allows the Administrator to customize the system to the needs of his/her organization by providing comment labels and an organization based definition of the label. These comment descriptions are displayed from a link on the C*omment Entry* screen.

The following table describes the process for customizing comment labels:

Tools: Comment Labels	**1.** From the menu bar select **Tools >> Comment Labels** to open the *Updating Comment Label* screen.
	2. Enter the label for the substantive type comment.
	3. Enter the label for the editorial type comment.
	4. Click the **Update** button to return to the *Document List* screen.

Note: If you have successfully completed this step, a "Document types attributes updated" message appears at the top of the screen.

Link Builder

RevCom provides a mechanism for automated text substitution within documents during the upload process. This feature, known as RevCom Link Builder, or, more simply, Text Patterns, is used primarily to convert document identifiers within the text of a document into Uniform Resource Locators (URLs) that link to the referenced documents. Multiple Text Patterns are allowed to enable the conversion of differing text string types into links or for entirely different purposes.

Note: This feature is only available to authorized RevCom Administrators.

The Text Patterns feature is very powerful, using regular expressions syntax (see *Pattern Definition*, below) to find text strings that match a pattern within a document and replace each with a different defined pattern. We recommend that you use this powerful feature *very carefully*: the principles of regular expressions are very complex, and all of the patterns that are enabled are applied to each uploaded document. However, RevCom will allow you to undo any links you create, should you make a mistake.

Select **Tools >> Link Builder** to display the *Link Builder* screen. Create a pattern with the string to be matched, the string to be substituted for the matched string, and an optional label identifying the pattern. The patterns feature allows for testing a new or updated pattern against a sample of text entered by the administrator before it is applied to uploaded documents. In addition, prior to saving a new or updated pattern, the administrator is encouraged to test it with all other enabled patterns already saved to ensure their interactions result in the desired behavior(s).

The administrator can enable or disable saved Text Patterns, Edit a pattern, or Delete a Pattern. Editing a pattern allows for changing the source, target, or label, as well as testing the edited pattern on a sample of text and testing the edited pattern with all other saved patterns on that sample before saving the changes. Saved patterns are applied to each new document as it is uploaded. There is also an option to apply the enabled patterns on all existing RevCom documents.

RevCom patterns will be applied as many times as possible on a given set of text. The given text to which the pattern is applied will either be the test text during a pattern editing session or a RevCom document after the pattern is saved (via the Create/Update button). After saving a pattern, the pattern will be applied to all documents subsequently uploaded to RevCom while that pattern is enabled. To apply a new or updated pattern to existing RevCom documents, click on the **Apply** button. When the administrator hits the Test button during an edit session, the new or updated pattern will execute against the text in the edit box labeled Test Text. When the administrator hits the Test All button, the new or updated pattern and all the saved and enabled patterns (except the original of the one you're editing) will execute against the test text.

Note: The Link Builder tool is very powerful and complex and should be used with care.

Pattern Definition

A pattern is defined with the following components:

- a source: A Perl-like regular expression. Matches are stored for use in targets. See below for more information regarding Perl regular expression.
- a target: A Perl-like string definition. Targets map to sources with the usage of parentheses, ( ), in sources and dollar signs, $, in targets. See below for details.
- a label: a free form text string. This label is not required, and if provided, it will only be used for identification of the pattern by the users.

On the *Link Builder* screen, you can enable or disable saved text patterns, edit a pattern, or delete a pattern. Editing a pattern allows for changing the source, target, or label, as well as testing the edited pattern on a sample of text and testing the edited pattern with all other saved patterns on that sample before saving the changes. Saved patterns are applied to each new document as it is uploaded. There is also an option to apply the enabled patterns on all existing RevCom documents.

Pattern Execution

RevCom patterns will be applied as many times as possible on a given set of text. The given text to which the pattern is applied will either be the test text during a pattern editing session or a RevCom document after the pattern is saved (via the Create/Update button). After saving a pattern, the pattern will be applied to all documents subsequently uploaded to RevCom while that pattern is enabled. To apply a new or updated pattern to existing RevCom documents, the user will hit the **Apply** button. When the user hits the Test button during an edit session, the new or updated pattern will execute against the text in the edit box labeled Test Text. When the user hits the Test All button, the new or updated pattern and all the saved and enabled patterns (except the original of the one you're editing) will execute against the test text.

Special Characters

The following special characters must be "escaped" (preceded with a backslash character, "\") if you are trying to match that character; otherwise it is interpreted as a pattern matching command. Only the forward slash character ("/") is accepted without an escape character preceding it (because it is frequently found in URLs, the expected primary usage of this patterns feature).

```
\ ^ . $ | ( ) [ ] * + ? { } ,
```

Source Definition

The following special characters perform pattern matching commands in the source string:

`\`	Quote the next metacharacter	`\w`	Match a "word" character (alphanumeric plus "_")
`^`	Match the beginning of the line	`\W`	Match a non-word character
`.`	Match any character (except newline)	`\s`	Match a whitespace character
`$`	Match the end of the line (or before newline at the end)	`\S`	Match a non-whitespace character
`|`	Alternation	`\d`	Match a digit character
`( )`	Grouping	`\D`	Match a non-digit character
`[ ]`	Character class	`\D`	Match a non-digit character
`*`	Match 0 or more times	`\b`	Match a word boundary
`+`	Match 1 or more times	`\B`	Match a non-(word boundary)
`?`	Match 1 or 0 times	`\A`	Match only at beginning of string
`{n}`	Match exactly *n* times	`\Z`	Match only at end of string, or before newline at the end
`{n, }`	Match at least *n* times	`\z`	Match only at end of string
`{n,m}`	Match at least *n* but not more than *m* times	`\G`	Match only where previous m//g left off (works only with /g)

Target Definition

The following special characters perform character substitution commands in the target string:

`\t`	Tab (HT, TAB)	`\c[`	Control character
`\n`	Newline (LF, NL)	`\l`	Lowercase next character
`\r`	Return (CR)	`\u`	Uppercase next character
`\f`	Form Feed (FF)	`\L`	Lowercase until `\E`
`\a`	Alarm Bell (BEL)	`\U`	Uppercase until `\E`
`\e`	Escape (ESC)	`\E`	End case modification
`\033`	Octal character	`\Q`	Quote (disable) pattern metacharacters until `\E`
`\x1B`	Hex character		

In addition, a dollar sign (“$”) followed by a numeral (1-9) causes the corresponding text matched in the source string to be copied into the target string – each match is copied into a new string sequentially, such that $1 represents the contents of the first match, $2 represents the contents of the second match, and so on (see Examples, below).

Examples

To transform: **FAM**

to: **Foreign Affairs Manual**

use source: **FAM**

target: **Foreign Affairs Manual**

To transform: **DoD O 412.1.X**

to: **<a href="http://www.directives.whs.mil/dod/421/o4211x.pdf">DoD O 412.1.X</A>**

use source: **DoD\s(\w)\s(\d+)\.(\d)\.(\w)**

target: **DoD $1 $2.$3.$4**

Tip: Note the usage of “( )” in the source to define the different strings, $x, in the target.