

# RevCom 5.1 OPI 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 Office of Primary Interest (Office of Primary Interest). The *RevCom 5.1 OPI 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 from throughout the Department to participate in the review and approval of revisions and additions to the U.S. Department of Energy (U.S. Department of Energy) Orders, Notices, Manuals, Guides, Policies (Directives). To facilitate comment entry, comment resolution, and reporting, draft Directives documents in RevCom are optionally segmented by paragraph, chapter, or section. Because users record their comments directly online and OPIs respond online, the RevCom system reduces the amount of time a Directives 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 assigned 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 any Administrator (Administrator). RevCom allows for variations in the depth and breadth of participation for any given document. To facilitate the broadest possible involvement in the review process, the Directives Point of Contact (DPC) for each participating office/organization has the opportunity to invite their 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) prior to submission to the next-higher organizational levels 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 may be extended by

the Administrator. 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 participating individual users within assigned U.S. Department of Energy offices whenever a document is opened for review and comment
- Automatic, electronic notification of review and comment due dates
- A structured, hierarchical U.S. Department of Energy 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 participating U.S. Department of Energy offices and organizations

## The RevCom Workflow Process for Directives

- Whenever a draft U.S. Department of Energy Directives is issued by ME-43 for review and comment and is posted to RevCom by the Administrator, the system sends an e-mail message to all assigned U.S. Department of Energy 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.
- The DPC reviews the draft Directives and determines who at his/her office are the appropriate person(s) responsible for conducting/coordinating the review of and comment on the draft Directives for the office. The DPC has the option of delegating his/her comment coordination responsibilities for each draft (except for package submission, which cannot be delegated).
- Either the DPC or the delegate enters the Subject Matter Expert (SME) assignment(s) 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 Administrator or higher level organization.
- 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, if the DPC so designates.
- SMEs must enter their comments into RevCom by their office due date less 'n' days, n being the number of days designated for each level to comment. 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. 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 (DMTEAM) proceeds with the issuance of a final version of the document and posts it to the DPC Web site.

## OPI Login and Exit

### Login

To begin working with RevCom, go to the **RevCom** link on the portal Web page. Clicking on the OPI task (e.g., Respond to Comments) brings up the OPI *login* screen. As the OPI, a username and password have been provided for you by the Administrator. To log in to RevCom, enter your username and password where prompted. Upon successful authentication, the OPI Document List screen will be displayed.

**Note:** This is the document list from which a document is picked for subsequent actions. It shows each document ID, Title, and Version with sections for document status: *Open for Comment, Comment Resolution, Completed, Cancelled, Withdrawn, or Final.*

The following table describes the process the OPI follows to log in to the RevCom system:

<b>OPI Login</b>  To begin any OPI task you must first login.	<b>1.</b> Click on the RevCom link on the portal page.
	<b>2.</b> Click on the <b>Review Comments</b> link.
	<b>3.</b> The <i>Login</i> screen will open. Log in by entering your OPI Username and Password. Both are case sensitive. Click the <b>Login</b> button.
	<b>4.</b> The <i>OPI Document List</i> page loads showing all documents that have been uploaded into the system and displaying the functions available to the OPI via the OPI Menu Bar and associated submenus.

### Exit

To exit from RevCom select from the menu bar **Document >> Exit**. This link will close your session with RevCom and you will have to return to the login screen to re-enter the system.

## Working with Documents

### The Difference between a “Document” and a “Version”

RevCom distinguishes between a “document” and its “versions”. Reviewers, commenters, and DPCs will primarily work with individual versions of each document; the “document” is only 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. Comments on any document are associated only with a single specific version.

### Select a Document Version to Work On

Once you have completed the login to RevCom, you will see the *Document List Screen* displaying all active versions of documents in the system from which you can select a version to work on. You can also select a version to work on using the menu, click **Document >> Select** submenu to display the list of all the active versions of documents in the system.

### The Document List

The *Document List* screen is the main screen for selecting documents to review. It lists the documents that your organization has been assigned to comment on as well as other documents available for comment. The *Document List* is organized according to status, and identifies draft versions by ID, title, and due date within these status groupings:

- **Open for Comment:** The list of versions that are open for comment
- **Comment Resolution:** The list of versions that are no longer open for comment and for which comments are being resolved and responded to by the OPI
- **Completed:** The list of versions that have completed their review cycles. For documents in this list, you can either add another version for review or close-out (i.e., withdraw or finalize) the entire document.
- **Cancelled:** The list of versions for which the review cycle has been cancelled prior to completion. For documents in this list, you can either add another version for review or 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.

To select a document version to work on, click on the document title. Based upon the status groupings, the system will display different information. For document versions in the Version Open for Comment status grouping, RevCom will open the *Response Entry* screen. For document versions in the Version Comment Resolution status grouping, RevCom will open the *Response Entry* screen. For document versions in the Version Review Completed status grouping, RevCom will open the *Section List* screen with each section title being a link to its text. For document versions in the Version Cancelled status grouping, RevCom will open the *Section List* screen with each section title being a link to its text. For document versions in the Document Final status grouping, RevCom will open the *Section List* screen with each section

title being a link to the *Document History Screen*. For document versions in the Document Withdrawn status grouping, RevCom will open the *Document History* screen.

## Display Document and Version Information

At the document level there are two options available to provide additional document information.

### **History**

The document history displays a list of the versions associated with the document. 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 the OPI follows to review 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*.

<p><b>Document History</b></p> <p>To view the document history.</p>	<p><b>1.</b> From the menu bar select <b>Document &gt;&gt; History</b> to open the <i>Document History</i> screen.</p>
	<p><b>2.</b> The system displays 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.</p>

### **References**

*References* are supporting materials relevant to a document and available to all reviewers and commenters in the system. These materials have been either uploaded to the system or hyperlinked from another web site. The *References* screen shows the Document ID, Title, and Issue Date for the related version, followed by a Title and Summary for the individual reference file.

The following table describes the process the OPI follows to review the version references.

<b>References</b> To view the references.	1. Select a document version from the <i>Document List</i> screen (you may skip this step if you have already selected a version and wish to view the list of references for the selected version).
	2. From the menu bar select <b>Document &gt;&gt; References</b> to open the <i>References</i> screen.

## Responding to Comments

As the OPI, one of your primary responsibilities will be to review and respond to comments that have been sent forward from offices and organizations participating in the review process. There are two steps in submitting your response package. First, you must create responses to the comments submitted by your DPC organizations and SMEs. Then you must submit your response package to the RevCom system. Once your package is submitted, reviewers can see the responses to the comments using the Report option and the document is ready for another review, such as the redline version for concurrence.

### Response Entry

After selecting a document version from the *Document List* screen, *Version Open for Comment* section *With Resolution Phase* subsection and *Assigned Documents* sub-subsection or the *Version Comment Resolution* section, the *Response Entry* screen displays. It shows the user information, the document version id and title with a link to the original format (pdf, MS Word, etc.) of the document being reviewed, and the due date for your responses to the comments. Next is a list of the section headings; each heading is prefaced with the total number of DPC and DPC comments for the section. Each section heading is a link to open the section for responses.

Be aware that if the document version is still open for comment, the reviewers may change those comments until the document version is open for comment resolution. However, as the OPI, you may create responses to comment packages as soon as they are submitted. You may only submit your response package after the document version is open for comment resolution.

### Open a Section to Work On

The OPI selects a section to work on by clicking on the section heading link. The *Response Entry* screen shows with the selected section open. Each top level organization that submitted a comment package is shown followed by all package comments for the selected section. Each comment is prefaced with the commenter's name, title and a date stamp for when the comment was entered. The **Add Response** button is on the right side of the line. The subsequent line(s) are the comment. When you enter a response to the comment, it will be displayed below the comment to which it applies.

The bottom of the screen shows the section title and a **View Section** button. The next line shows your available comment response options and **Save** and **Clear** buttons on the far right. The bottom of the screen shows the response entry text editor.

### Enter a Response

To enter a response, click on the **Add Response** button to the right of the comment you are responding to. The response entry text editor section opens. Select your response option from the radio buttons and enter your response in the text box. You may change the comment type, if needed. Click on the **Save** button on the right side of the screen. Your response is committed to

the database and the screen refreshes. The response option you selected and your response to the comment show below the comment.

You can navigate through all of the comments using the right scroll bar. You can move to the next section using the Jump to: pull-down listing of section titles found near the top of the screen. To view the OPI comments, click on the **Move to OPI Comments** link.

<b>Respond to Comments</b>  Enter responses to each comment.	<b>1.</b> On the <i>Response Entry</i> screen, click on the <b>Add Response</b> button to the right of the comment to open the response entry text editor.
	<b>2.</b> Select the radio button for your response option.
	<b>3.</b> Verify the comment type, or change if needed.
	<b>4.</b> Enter your response in the text editor.
	<b>5.</b> Click on the <b>Save</b> button on the right side of the screen. Your response is committed to the database and the screen refreshes. The response entry text editor is closed and your response option and text is displayed below the comment.

## Submit Package

The **Submit Package** menu item will take you to the *Send Package* screen. You will use this page to send your completed response package to the DMTEAM and all reviewers.

## Notify Users

Once you have submitted your response package you notify the DMTEAM and all workflow participants that responses are available for view. The system automatically generates an e-mail message with the document name.

The following table describes the process the OPI follows to notify the DMTEAM and workflow participants.

<b>Notify Response Package Submitted</b>  Notify the commenters that the response package is sent.	<b>1.</b> On the <i>Submit Package</i> screen, click on the <b>Submit</b> button to send your response package. The package is sent and you are returned to the same screen.
	<b>2.</b> To notify commenters that the response package is ready to view, click on the Notify button. The system will return you to the <i>Version Status</i> screen.

### Note



## OPI Reports

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

### Quick Reports

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

The following table describes the process the OPI follows to obtain a Quick report:

<p><b>Quick Report</b></p> <p>View commonly requested predefined reports.</p>	<ol style="list-style-type: none"> <li>1. From the menu bar select <b>Reports &gt;&gt; Quick</b> to open the <i>Quick Report</i> screen.</li> <li>2. A list of predefined reports displays. Click on the link of the report to view.</li> </ol>
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### Custom Reports

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

The following table describes the process the OPI follows to obtain a Custom Report:

<p><b>Custom Report</b></p> <p>Create your own report.</p>	<ol style="list-style-type: none"> <li>1. From the menu bar select <b>Reports &gt;&gt; Custom</b> to open the <i>Custom Report</i> screen.</li> <li>2. Scroll through the screen and select reporting criteria.</li> <li>3. Press <b>Submit</b> to generate the customized report.</li> </ol>
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## Document Status

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

- Document Title
- Document Status (Open, Withdrawn, Final)
- Workflow status for each document
  - Number of accesses to date for each document
  - Number of comments by:
    - Total
    - OPI Comments
    - OPI Comments
- Open for Comment
- Resolution
- Completed
- Cancelled
- Planned and Actual dates the document entered (or will enter) each of the workflow states

The following table describes the process the OPI follows to obtain a Document Status report:

<b>Document Status</b> View all documents in the RevCom system.	1. From the menu bar select <b>Reports &gt;&gt; Document Status</b> to open the <i>Document Status</i> 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 three, six, and twelve-month Gantt chart view. The schedule is based upon the current date.

The following table describes the process the OPI follows to obtain a Planner report:

<b>Planner</b>  View document reviews in progress in Gantt chart format.	1. From the menu bar select <b>Reports &gt;&gt; Planner</b> to open the <i>Document Planner</i> screen.
	2. Scroll to the left and right to review the Planner.

## OPI Tools

### Search Comments

The OPI has the ability to search the comments entered into the system. Comments may be reviewed based on a number of criteria including:

Comment - a phrase found in the comment

Organization - to view comments from a particular organization

Document Title - text that appears in the title of the document

Commenter- the name of the person making the comment

All of the RevCom visibility rules apply for searching comments. This means, a) only comments from your organization and b) only comments that have been submitted by a site DPC of another organization may be viewed.

The following table describes the process the OPI follows to generate a broadcast e-mail:

<b>Search Comments</b>  Search for comments entered into the RevCom system.	1. From the menu bar select <b>Tools &gt;&gt; Search Comments</b> to open a new window with the search form.
	2. Enter the search criteria and <b>Submit</b> .
	3. The search results display.

**Note:** The *Search Comments* function will appear in a separate window. Closing this window will not end your session with RevCom.

## Search Library

The OPI has the ability to search sources available through the U.S. Department of Energy Directives Portal Electronic Library. The **Search Library** link in the menu will open a new window containing a search form. This search capability will make it easier for citing existing directives or other available sources in your response.

<b>Search Library</b>	1. From the menu bar select <b>Tools &gt;&gt; Search Library</b> to open a new window with the search form.
	2. Enter the search criteria and <b>Submit</b> .
	3. The search results display.

**Note:** This will not end your session with RevCom.