# RevCom 5.2
# DPC/Delegate/SME
# 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 Directives Point of Contacts (DPCs), Delegates, and Subject Matter Experts (SMEs). The *RevCom 5.2DPC/Delegate/SME User Guide* provides detailed instructions for understanding and managing the features and functionalities of the RevCom process. It explains the process that DPC's and their delegates follow for coordinating official comments to draft directives: the assignment of SMEs to review and comment on U.S. Department of Energy DOE draft directives; the assignment of Delegate(s) to manage the comment coordination process for each directive; setting the due dates for SME and delegate comments; reviewing and compiling SME, delegate, and supporting organizations comments into a single comment package for submittal to next level DPC or Office of Primary Interest (OPI) by the due date; and coordinating with the DOE and the reviewers (SMEs, Delegates, and supporting organizations) on resolution of outstanding issues resulting from the directive OPI's response to the site's comments. It describes the process that SMEs follow to enter comments and submit their packages. This guide also describes how to view the various reports available to RevCom users.

## Introduction

### RevCom Overview

RevCom is a Web based Review and Comment System (RevCom) that enables managers and employees from throughout the Department to participate in the review and approval of revisions and additions to the Orders, Notices, Manuals, Guides, Policies (Directives). Draft directives in RevCom are optionally segmented by paragraph, chapter, or section, which allows users to record their comments by discrete segments, and provides for easier comment resolution and reporting. Because users record their comments directly online, the RevCom system reduces the amount of time a directive spends in draft status. Comments are consolidated in each DOE office prior to submission to the next organizational level of review in the system.

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 predefined 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 DPC for each participating office/organization have the ability 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 or 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 individual users within assigned DOE offices whenever a document is opened for review and comment
- Automatic, electronic notification of 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

- Whenever a draft DOE directive 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 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.
- Directives Management Office (DMTEAM) proceeds with the issuance of a final version of the document and posts it to the DMTEAM Web site.

# DPC Login and Exit

## Login

To begin working with RevCom, go to the **RevCom** link on the portal Web page. Clicking on the DPC task (e.g., Consolidate Comments) brings up the DPC Login screen. As the DPC, 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 DPC 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 DPC follows to log in to the RevCom system:

| | |
|---|---|
| DPC **Login**<br><br>To begin any DPC task you must first login. | **1.** Click on the RevCom link on the portal page to open the *Login* screen. |
| | **2.** Click on the DPC task **Coordinate Comments**. |
| | **3.** Login by entering your DPC Username and Password. Both are case sensitive. Click the **Login** button. |
| | **4.** The DPC *Document List* screen opens showing all documents that have been uploaded into the system and displaying the functions available to the DPC via the DPC 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," as far as RevCom is concerned, is the master record that contains information common to all versions (such as the document title) and provides the key to performance measures and reports for the entire document review cycle. The content of the document is maintained in the versions of the document, thereby allowing the content to evolve while maintaining a history of that evolution through the review cycle. Comments on any document are associated only with the single specific version on which the comments were made.

## 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 use the menu to bring up the Document List Screen to select a version to work on; click on the **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 document versions that your organization has been assigned to comment on as well as versions of other documents available for comment. The *Document List* is organized according to status, and identifies draft versions by ID, title, and due date:

- ***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. Documents with versions in this list are awaiting disposition, such as another version review or close-out (i.e., withdrawal or finalizing).
- ***Cancelled***: The list of versions for which the review cycle has been cancelled prior to completion. Documents with versions in this list are awaiting disposition, such as another version review or close-out (i.e., withdrawal or finalizing).
- ***Withdrawn***: The list of documents that have been withdrawn, along with each of their versions, from their RevCom review processes.
- ***Final***: The list of documents that have completed their review cycles.

To select a document version to work on, click on the document version title. Based upon the status groupings, the system will display different information. The following table lists the screen that will be displayed when you click on a document version title based on the status grouping under which the document version title is listed.

| **Document Version Status Grouping** | **RevCom screen** |
|---|---|
| *Assigned Documents* under *Version Open for Comment* | *Comment Entry* |
| *Other Documents* under *Version Open for Comment* | *Section List* |
| All document versions under *Version Comment* Resolution | *Section List* |
| All document versions under *Version Review Completed* | *Section List* |
| All document versions under *Version Cancelled* | *Section List* |
| All documents under *Document Final* | *Document History* |
| All documents under *Document Withdrawn* | *Document History* |

The *Document History, Comment Entry, and Section List* screens are described in detail below.

## 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 DPC 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*.

| | |
|---|---|
| **Document History**<br><br>To view the document history. | **1.** From the menu bar select **Document >> History** to open the *Document History* screen. |
| | **2.** 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. |

### 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 DPC follows to review the reference documents:

**Note:** To view reference documents, you must first select a document version to work on from the *Document List* screen.

| | |
|---|---|
| **References**<br><br>To view the document references. | **1.** From the menu bar select **Document >> References** to open the *References* screen. |
| | **2.** The system displays the id, title, and issue date of the document version followed by the title and a summary of each supporting document. A reference document may be displayed by clicking on the reference document title. |

# Coordinating the Review of a Document Version

## Overview

Reviewing document versions is the very heart of your role in the RevCom system. As DPC, you are responsible for coordinating the review and comment process for your office or organization. Once your reviewers have entered their comments, it will be your responsibility to review all of the comments to determine which will be included in the official comments package for your organization. RevCom provides you with the tools you will need to get this done easily and on time.

One of the most powerful features at your disposal is the ability to assign one or more Delegates to handle the comment coordination process for you. Typically, a Delegate is someone with deep knowledge and responsibility in the subject area of the document being reviewed and someone who knows the top subject matter experts in the field. Since, a Delegate has the authority to edit comments and recommend which comments will be included in the final package, you should choose someone who both knows the subject area and will work with you to complete the review. For example, if the document version you are reviewing deals with security, you would choose as your Delegate the person in your organization who is a recognized authority on security issues, or the person who is *responsible* for dealing with security issues in your organization. You can assign as many Delegates as you like; however, it's usually more efficient to limit the number of Delegates.

Both you and your Delegate(s) have the authority to assign and invite subject matter experts (SMEs) to review a document version. Of course, few if any people actually have "Subject Matter Expert" in their job titles – this is just a generic term we use to describe the people who either should or must comment on a particular document version. The review by SMEs is the overarching goal of RevCom, and their comments will often form the basis of your office or organization's position on a document version that is out for review. RevCom has been designed to make it as easy as possible for SMEs to review and comment on a document, yet provides you with the controls you need to ensure that your SME comments are useful and germane.

The bottom line is: don't be afraid to delegate. As DPC, *you* hold the keys to the process, and you decide what gets submitted in the final comments package for your organization. Delegates and SMEs can help ensure that the package you submit clearly represents your position on the document.

## Assigning Delegates and SMEs

To facilitate and enhance the review and comment coordination process, you have the option to assign Delegates and individual reviewers (subject matter experts – SMEs) to work on a specific document version.

**Note:** Assigning Delegates is an *optional* function. You can successfully coordinate the review and comment process yourself without the help of Delegates.

Delegates are typically people who have knowledge, experience, and/or responsibility in the subject area of the document being reviewed. Your Delegates will have essentially the same privileges and authorities as you: assign SMEs to review the document, change the relative importance of comments (e.g., from "Major" to "Minor"), edit the text of comments, submit comments, and recommend individual comments for inclusion in the final package. On the other hand, only you – the DPC – have the authority to submit the final comment package.

Subject matter Experts (SMEs) are often the people who will do most of the commenting on document versions. Though assigning SMEs is optional, this is the best way to ensure that your final comment package will reflect the broad spectrum of experience and knowledge in your organization. To encourage review and comment, SMEs have few privileges beyond reviewing the document version, looking at the comments from other users within your office or organization, and entering their comments.

In addition to allowing comments from pre-assigned SMEs (i.e., from SMEs assigned by you or one of your Delegates), the current configuration of RevCom at DOE will allow other SMEs in your organization to login with their e-mail address and submit comments to you.

Reviewers, delegates and SMEs accounts need to be set up prior to assignment (see the section on **Managing Organizations and Users** or select **Accounts >> Create Users** from the menu). Once you have created accounts for your SMEs and Delegates, you can arrange them into subject area groups and reassign them to subsequent versions and new documents. Of course, you can always add or change your SME and Delegate accounts and groupings.

Once a Delegate has been assigned to a document version, he or she can assign SMEs to comment on the version.

**Note:** The **Version >> Assign Users** submenu is only available when a version has been selected from the Document List (available from **Document >> Select**).

The following table describes the process for assigning Delegates and SMEs to a document version.

| | |
|---|---|
| **Assigning Users**<br><br>Assign users to versions for comment. | **1.** Select a document version from the *Document List* screen (you may skip this step if you have already selected a version). |
| | **2.** From the menu bar select the **Version >> Assign User** to open the *Assign User* screen. This screen displays the version title, the name of the individual to whom your comments are due, their organization, and the date the comments are due. |
| | **3.** The *Assign User* screen will also display the previously defined groups and the reviewers previously defined with checkboxes for selecting each. |
| | ***4.*** Check the reviewers or groups you want to assign to the current version. Click on the **Assign User** button. |

**Note:** A successful user assignment will refresh the *Assign User* screen with the message "User assignment successfully updated".

Once you have assigned the groups and/or reviewers to the selected version, you may notify your reviewers of the assignment by clicking on the **Notify** button to open the e-mail notifications.

The following table describes the process for notifying Delegates and SMEs of assignment to a document version.

| | |
|---|---|
| **Notifying Users**<br><br>Notify users of assignment to versions for comment. | **1.** Click on the **Notify** button to open the *Notify Assigned Users* screen. |
| | **2**. To add additional text to the messages, enter the text in the Text Box. |
| | **3.** Click on the **Send** button. |

## Setting the Due Date

When a document is made available for comment, a "global" due date is set. The global due date is the date by which all comments are due to the OPI. The due dates are set throughout the system based upon the organizational hierarchy and the default number of days allowed for each assigned organization in the hierarchy. Though the total review period may span thirty days or more, individual organizations and offices within DOE typically have less time to comment if their comments have to be routed through another organization before reaching the OPI.

If your organization has been assigned to the review process for a document version, RevCom will automatically set the date your comments are due to the next organization in the review hierarchy *and* the date comments are due *from* your delegates, your SMEs, and your reporting organizations to you. Each DPC within the review hierarchy has the authority to change the date (i.e., either shorten or extend) comments are due to them; however, only the DPC (or OPI) to whom you will be submitting your comments can change the date *your* final comments package is due to them.

Each time you change the dates comments are due to you, RevCom will give you the opportunity to notify your reviewers (Delegates, SMEs, and DPCs in your reporting organizations) that you have changed the date. In general, it is best to allow a few days between the date comments are due to you and the date comments are due the next level DPC in line. If you make a mistake, you can reset the due date up until your due date has passed.

The following table describes the process for setting the due dates for comments to be submitted to you.

| | |
|---|---|
| **Set Due Dates**<br><br>Set the due dates for your delegates, SMEs, and each organization submitting comments to you. | **1.** Select a document version from the *Document List* screen (you may skip this step if you have already selected a version). |
| | **2.** From the menu bar select **Version >> Set Due Dates** to open the *Set Due Dates* screen. |
| | **3.** To set the Review Due Dates for your organization, you may click on the calendar icon and select the date, or you may change the date in the text editor and click on the **Change** button. |
| | **4.** Once you have set your new dates, click on the **Update** button to propagate your new dates. |

## Notify Users of Due Date Changes

Once you have changed the review due dates, you need to notify your reviewers by clicking on the **Notify** button to open the e-mail notifications.

The e-mail to Delegates and DPCs in reporting organizations contains:

- Document Type
- Document Name
- Open Date
- The date comments are due to your organization (i.e., due to *you*)
- The date comments are due from your organization to the next reviewing organization (or the OPI)
- A reminder that, as a Delegate or DPC, they have the authority to change the date when comments are to do them

The SME e-mail contains:

- Document Type
- Document Name
- Open Date
- The date comments are due to the you, the DPC

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

The following table describes the process for notifying the Delegates, SMEs, and DPCs in your reporting organizations.

| | |
|---|---|
| **Notify Due Dates**<br><br>Configure the notifications messages that will be sent. | **1.** Click on the **Notify** button to open the *Document 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 automatically included in subsequent notifications (you can change or remove this text later). Click on the **Save & Notify** button at the bottom of the screen to save any text you have entered. The system will return you to the *Set Due Dates* screen. |

# The Comment Coordination Process

## Comment Entry for DPCs and Delegates

Once you have selected a document version to work on, RevCom will display the *Comment Entry* screen, which is where you will perform most of your comment coordination activities. The *Comment Entry* screen shows your user information, the **document version ID and title** linked to the original format (pdf, MS Word, etc. – click on this link to print or review the entire document) of the document being reviewed, and to whom your comments are due (the next level in the organizational hierarchy or the OPI) with the **due date** for submitting your comments package.

Below the identifying information for the document version, there is a **No Comment** button that allows you to indicate that your organization has “no comment” on the document version that you are reviewing. If, indeed, you have no comments (i.e., you approve of the document version *as is*), you *must* click on the **No Comments** button. This action records “No Comment” as a Suggested comment under the OVERALL section.

The *Comment Entry* screen also lists the section headings for each section in the document. The section headings are links to open a section for comment. To assist with the comment coordination process the section headings are prefaced with two comma separated numbers enclosed in square brackets. These two numbers indicate the number of Major and Suggested comments submitted to you.

If the due date for your comments has passed, meaning you will be unable to comment further on the version, the *Section List* screen opens when you select a document version to work on. The *Section* List screen lists the section headings for each section in the document, however, the section headings are not links.

If the list of sections is long, you may use the **Jump to:** box to move quickly to a particular section. You do not have to review and comment on sections in any particular order, and you may return to this screen as many times as you like, provided the due date for comment entry has not passed.

### Open a Section to Work On

Select a section to work on by clicking on the section heading link. The work area for the section will be opened and displayed (indicated by an *open folder* icon next to the section title). Click on the **View Section** button on this line to open a new window containing the section text.

The open section work area on the *Comment Entry* screen is divided into distinct sub areas:

- the first sub area is for your own comments and has the **Add Comment** button;
- the next sub area contains comments from your delegates and SMEs; and
- the third sub area contains the comments submitted to you by the DPCs in the organizations that report to your organization. If no other organizations submit comments *through* your organization, this sub area will not be displayed.

Each comment is prefaced with the commenter's name, title and a date stamp for when the comment was entered. All comments except your own are prefaced with a checkbox that you use to indicate which comments will be included in your final comments package. As a Delegate, this check box indicates that you recommend to your DPC to include the comment.

**Tip:** Generally, you will probably want to use the **Include All** button first to automatically include all comments, and then manually exclude duplicate or unnecessary comments by unchecking individual check boxes.

If you are the DPC and you have assigned one or more Delegates to work on this document version, comments from SMEs and your reporting organizations will be marked with an additional checkmark if they have been recommended by one or more delegate(s) for inclusion in the comment package.

The bottom of the screen contains the comment entry text editor. It displays the section title followed by a **View Section** button. The next line has a pull down box for the type of comment (e.g., "Major" or "Minor"), with **Save** and **Clear** buttons on the far right.

## Entering Comments

To enter a comment on the selected section of the document version, click on the **Add Comment** button near the top of the open section work area. The comment entry section opens. Choose the comment type from the pull down box at the bottom left and enter your comment in the text editor like text entry box. Click on the **Save** button to save your comment and your comment will appear in the list of comments beneath the section title.

| | |
|---|---|
| **Entering Comments**<br><br>To enter comments by section. | **1.** From the menu bar select **Document >> Select** to open the *Document* List screen. Click on the version title to display the *Comment Entry* screen. |
| | **2.** Click on the section you wish to comment on. The closed folder will open and the text of the section will display in a popup window. The open section will include the DPC name and the date and time a comment was made. |
| | **3.** To add a comment, click on the **Add Comment** button. Scroll to the bottom of the screen and enter your comment in the text editor. Select the comment type, Major or Suggested from the pull down box. If you need definitions for these comment types, click on the **Info** link to the right of the comment type pull down box. |
| | **4.** Click on the **Save** button. Your comment will be added to the open folder section and will be displayed. |
| | **5.** You may edit an existing comment by clicking on the **Edit** button. After you have modified this comment, click on the **Save** button. |
| | **6.** To delete an existing comment, click on the **Delete** button. This removes your comment from the display. |
| | **7.** To view the section text, if you have closed the window or it has been moved to the back, click on the **View Section** button. |
| | **8.** If you or your organization has no comments for this document, click the **No Comments** button. |

**Note:** Remember, if you or your organization does not have any comments, you must click the **No Comments** button.

## Delegates: Recommending Comments for Inclusion in the Package

As a Delegate, you can enter your own comments and you review comments from SMEs and from your reporting organization(s). You recommend to your DPC the comments to include in the comment package by checking the *include* box next to each comment (do not check this box if you don't recommend inclusion of the comment in the final comment package). Once you submit your comments, the DPC will see a checkmark next to those comments you have recommended.

The process to review and recommend submitted comments is described below.

<table>
<tr><td rowspan="3">Delegate Recommend Comments<br><br>Review all SME and supporting organization comments and recommend to the DPC the comments to include in the organization comment package.</td><td>1. To recommend a comment, click the checkbox next to the commenter name.<br><br>Optionally, you may click on the Include All button. The screen will refresh and all the checkboxes next to each comment will be checked. You can move through the comments and uncheck those you wish to exclude.<br><br>Conversely, you may click on the Exclude All button. The screen will refresh and all the checkboxes next to each comment will be unchecked. You can move through the comments and check those you wish to include.<br><br>Click on the Save button. The screen will refresh with the checked boxes.</td></tr>
<tr><td>2. To edit a comment, click on the Edit button to the right of the commenter name. The comment text will display in the text editor at the bottom of the screen. Modify the comment and click on the Save button. The screen will refresh with the modified comment in your comment area at the top of the screen.</td></tr>
<tr><td>3. To change the comment type, click on the Edit button to the right of the commenter name. The comment text will display in the text editor at the bottom of the screen. Change the comment type from the pull down menu to the left of the text editor and click on the Save button. The screen will refresh with the modified comment in your comment area at the top of the screen.</td></tr>
</table>

| | |
|---|---|
| | **4.** To move to the next section for review, click on the section heading after the open section.<br><br>Optionally, you can select the section heading to move to from the Jump to: pull down box found near the top of the screen. Click on the section heading to open it for comment. |

**Note**: SMEs may amend their comments in RevCom up until the expiration of your DPC due date (the date you set for lower levels).

### Delegate Submit Comments

After all comments are entered and recommendations made, you submit your comments to your organization's DPC. If you have no comments on the draft directive, click the **No Comments** button, and submit your comment package to your organization's DPC.

The following table describes the process to submit your comments:

| | |
|---|---|
| **Submit Comments**<br><br>Submit Delegate comments to the DPC. | **1.** After all comments to each section are entered and all recommendations are made, you are ready to submit your comments to the DPC.<br><br>From the menu bar select **Version >> Submit Package** to open the *Submit Package* screen. This screen will display the version title, the name and organization where the comments are due, and the document close date. |
| | **2.** You may enter the name/title of the **approving official**, as appropriate. |
| | **3.** You may enter additional text to the message sent to your commenters and your DPC notifying them that the package has been submitted. |
| | **4.** Enter additional cc: e-mail addresses. |
| | **5.** Click on the Submit button to send your comment package and notify your commenters. |

**Note:** If you have successfully completed this step, a "Comments submitted" message appears at the top of the *Comment Entry* screen. Remember, if you have no comments, you must click the **No Comments** button and submit your comment package.

## DPC Review of Comments

As the DPC for your organization, you review and consolidate comments sent to you from your reviewers. You review the delegate comments, the SME comments, and comments from your reporting organizations. You select those comments you wish to include in your comment package, using the “Is Recommended” checkmarks for guidance. You may choose to edit comments that require modification.

You can navigate through all of the comments by type using the right scroll bar of the open section. Comments are reviewed section by section and by type, Major and Suggested. You can move to another section using the Jump to: pull down listing of section headings found near the top of the screen and click on the section heading to open or you click on the section headings that surround the open section. You can move to the Suggested comments by clicking on the **Show** Suggested button found on the right side under the **View Section** button.

This process to review and consolidate submitted comments is described below.

<table>
<tr><td rowspan="3">Review Submitted Comments<br><br>Review all delegate, SME, and supporting organization comments and consolidate them into a single site comment package for submission to the next higher level DPC in RevCom.</td><td>1. To include a comment, click the checkbox next to the commenter name.<br><br>Optionally, you may click on the Include All button. The screen will refresh and all the checkboxes next to each comment will be checked. You can move through the comments and uncheck those to exclude.<br><br>Conversely, you may click on the Exclude All button. The screen will refresh and all the checkboxes next to each comment will be unchecked. You can move through the comments and check those to include.<br><br>Click on the Save button. The screen will refresh with the checked boxes.</td></tr>
<tr><td>2. To edit a comment, click on the Edit button to the right of the commenter name. The comment text will display in the text editor at the bottom of the screen. Modify the comment and click on the Save button. The screen will refresh with the modified comment in your comment area at the top of the screen.</td></tr>
<tr><td>3. To change the comment type, click on the Edit button to the right of the commenter name. The comment text will display in the text editor at the bottom of the screen. Change the comment type from the pull down menu to the left of the text editor and click on the Save button. The screen will refresh with the modified comment in your comment area at the top of the screen.</td></tr>
</table>

| | |
|---|---|
| | **4.** To move to the next section for review, click on the section heading after the open section.<br><br>Optionally, you can select the section heading to move to from the Jump to: pull down box found near the top of the screen. After the move, click on the section heading to open it for review. |

**Note**: Delegates and SMEs may amend their comments in RevCom up until the expiration of their due dates (the dates you set for lower levels). You may want to refrain from consolidating delegate and SME comments until after their due dates have expired to ensure that your comments package contains no changes you aren't aware of, and contains all the comments your reviewers submitted that you want to include. However, RevCom allows you to begin the consolidation process as soon as comments are submitted.

# Submitting Your Comment Package

As the DPC for your office or organization, your primary responsibility in the Directives review process is to coordinate and submit the official comment package for your organization. The comment package contains all of the comments that were sent to you that you have selected for inclusion and any comments you made yourself. Before submitting the final comment package, you should take the time to review the comments that have been submitted to you. Refer to the previous section.

With your comment consolidation and review completed, submit your completed comment package to the next level in the RevCom system and notify the reviewers that the package is sent. Once your package is submitted, other DPCs in the system can see the comment package you submitted for your organization – they will *not* be able to see any comments you excluded from the comment package. Depending on where your organization lies in the DOE hierarchy (and how the review process was defined for the document version you are working on), your comment package will be sent either to the organization to which your organization reports or directly to the OPI.

### Submit Package

After Delegate, SME, and supporting organization comments have been consolidated and you have entered your own comments (if any), the comments package needs to be submitted to the next higher DPC (or the OPI).

The following table describes the process to submit the comment package:

| | |
|---|---|
| **Submit Package**<br><br>The comment package is ready to go to the next higher DPC or the OPI. | **1.** Once all sections have been reviewed, you are ready to submit your organization comment package forward. From the menu bar select **Version >> Submit Package** to open the *Submit Package* screen. This screen will display the version title, the name and organization where the comments are due, and the document close date. |
| | **2.** You may enter the name/title of the approving official for your organization's comments. |
| | **3.** You may enter additional text to the message sent to your commenters notifying them that the package has been submitted. |
| | **4.** Enter additional cc: e-mail addresses. |
| | **5.** Click on the **Submit** button to send your comment package and notify your commenters. |

Once you have submitted your package, you may notify your reviewers of the comment package submittal by clicking on the **Notify** button to open the e-mail notifications.

The following table describes the process for notifying Delegates and SMEs of organization comment package submission.

| | |
|---|---|
| **Notifying Users**<br><br>Notify users of organization comment package submission. | **1.** Click on the **Notify** button to open the *Notify Package Submission* screen. |
| | **2.** To add additional text to the messages, enter the text in the Text Box. |
| | **3.** Click on the **Send** button. |

# Viewing Sections

Document versions that are in the “Other Documents” under “Version Open for Comments” status grouping, or any document version under the “Version Comment Response”, “Version Completed” or “Version Cancelled” status groupings of the Document List screen are not open to you for entering comments because either you are not assigned to the version or the comment entry period is over (i.e., the review is in response phase or has been completed or cancelled). When you click on the title of such a document version, RevCom will bring up the Section List screen. This screen lists the sections of the document version you selected; each section title is a link to display the contents of that section.

| | |
|---|---|
| **View Sections**<br><br>View the list of section titles and section contents. | **1.** On the *Section List* screen, click on a section title to open the section for viewing the section contents. |
| | **2.** Click on the section title again to close the section. |

# Managing Organizations and Users

## Create User Accounts

As the DPC, you can create Delegate and SME accounts for reviewing documents in RevCom by selecting from the **Accounts >> Create User** menu option. This submenu opens up the *Create User* screen where you first identify the reviewer role, selecting either Delegate or Subject Matter Expert. Then you complete the user account entry form and click **submit** to create the account. Once you have created user accounts for Delegates and SMEs, you can choose which of these users to assign to the review of individual document versions.

The following table describes the process the DPC follows to create accounts for reviewers.

| | |
|---|---|
| **Create User**<br><br>Set up reviewer accounts. | **1.** From the menu bar select **Accounts >> Create User** to open the *Create User* screen. |
| | **2.** Select either the Delegate or Subject Matter Expert role to open the *Create User* screen. |
| | ***3.*** For a Delegate, enter the RevCom Username (how you want to identify this delegate within RevCom), the Delegate's full name, e-mail address, and any copy to e-mail addresses. As DPC, you assign a RevCom password. The external title will be populated with *Delegate.*<br><br>For a Subject Matter Expert, enter the user's internet e-mail address. The external title will be populated with *Subject Matter Expert*. |
| | **4.** Click the **Create User** button to create the reviewer account.<br><br>Click the **Cancel** button to cancel the creation of the review account and return to the *Document List* screen. |
| | **5.** If an error is detected (e.g. username is not unique, missing e-mail address), the account will not be set up. |

**Note:** A successful creation will refresh your *Create User* screen with a "Delegate created" message.

## View/Edit User Accounts

As the DPC you can view and edit the reviewer accounts you have set up by selecting from the **Accounts View/Edit User** submenu. This submenu will bring up the *View/Edit User* screen. This screen will display a list of the users you have created.

**Note:** The *View/Edit User* screen will also display your deactivated users.

The following table describes the process the DPC follows to view/edit the reviewers that have been defined.

| | |
|---|---|
| **View/Edit User**<br><br>View or edit the reviewer accounts. | **1.** From the menu bar select **Accounts >> View/Edit User** to open the *User View* screen that displays a listing of all users you have set up. |
| | **2.** To edit a reviewer account, click on the Delegate's RevCom username or the SME's internet e-mail address to open the *Update User* screen. |
| | **3.** The information previously entered for the account displays. You may edit any or all fields for the Delegate or SME. |
| | **4.** Click on the **Update** button to save the reviewer account information to the database. The **View/Edit User** screen refreshes. |
| | **5.** To deactivate an existing reviewer account, select the reviewer by username or internet e-mail address to open the *Update User* screen. Click on the **Deactivate** button. |
| | **6.** The **Cancel** button will take you back to the *View/Edit User* screen. |

**Note:** A successful edit will refresh your *View/Edit User* screen with a "User successfully updated" message. A successful deactivation will refresh your *View/Edit User* screen with a "User successfully deactivated" message.

## Create Group Accounts

As the DPC you can create groups of reviewer accounts by selecting the **Accounts >> Create Group** menu. This option allows you to select one or more reviewers (Delegates or SMEs) and assign them to a group account. Once you have assigned users to groups, you can easily assign an entire group to review a particular document version.

> **Tip:** Create users groups based on similar knowledge and expertise rather than a new user group for each document version. If you use simple, identifiable names for your groups, it will be much easier to reuse the groups for other review processes. For example, put all of your Delegates and SMEs that work with security issues in a group you name "Security." Every time you have a document version to review that deals with security, you simply assign this group – a couple of clicks and you're done.

Optionally, you may also create a new group from the *View/Edit Group* screen.

> **Note:** You may mix any number of reviewer roles (Delegates and SMEs) in a user group.

The following table describes the process the DPC follows to create group names for reviewers that have been defined.

| | |
|---|---|
| **Create Groups**<br><br>Create group accounts for reviewers. | **1.** From the menu bar select **Accounts >> Create Group** to open the *Create Group* screen. This screen displays a listing of all reviewers you have set up with a checkbox next to the name and a text box to enter a **Group Name**. |
| | **2.** Check the boxes of those reviewers you want to include in the new group. |
| | **3.** Enter a name in the **Group Name** textbox to assign to the group. |
| | **4.** Click on the **Create Group** button. |

> **Note:** A successful group creation will bring up the *View/Edit Group* screen with a "User Group *group name* created" message. You may also create a new group from the *View/Edit Group* screen by clicking on the **New** button.

## View/Edit Group Accounts

As the DPC, you can view and edit your group reviewer accounts by selecting the **Accounts >> View/Edit Group** submenu. This allows you to see your groups and which reviewers are in each group.

The following table describes the process the DPC follows to view and edit groups of reviewers that have been defined.

| | |
|---|---|
| **View/Edit Groups**<br><br>View and edit reviewer group accounts. | **1.** From the menu bar select **Accounts >> View/Edit Group** to open the *View/Edit Group* screen. This screen displays a list of the group names you have set up and the reviewers assigned to the groups. |
| | **2.** Click on the group name to open the *Edit Group* screen to edit the group name or the reviewers within a group, |
| | **3.** This screen displays a list of reviewers within the group. Those who have been assigned to the group name will have a check next to them. The **Group Name** is available for modification. |
| | **4.** After your changes, click on the **Update Group** button. |

**Note:** A successful group edit will bring up the *View/Edit Group* screen with a message "User Group *group name* successfully updated".

## SME Login and Exit

The DPC and his/her Delegates may assign one or more SMEs to review a version of the draft directive document that has been posted to RevCom. As directed by the DPC, RevCom sends an e-mail notification to the assigned SMEs stating that a version of the draft directive document is available for review, that you have been assigned as an SME, and that comments are due to the DPC by a specific due date.

### Login

To begin working with RevCom, go to the **RevCom** link on the Portal Web page. Clicking on the SME task (Review Documents) brings up the SME Login screen. To login to RevCom, enter your e-mail address under the SME label.

First time logins require that you select your home organization. From the dropdown box select your organization and click OK. Upon successful authentication and home organization selection, the *SME Document List* screen will be displayed.

**Note:** This is the document list from which a document is picked for subsequent actions. It shows each version assigned to you displaying date, title, and version with sections for document status.

The following table describes the process the SME follows to login to the RevCom system:

| | |
|---|---|
| **SME Login**<br><br>To begin any SME task you must first login. | **1.** Click on the RevCom link on the portal page to open the *Login* screen. |
| | **2.** Click on the **Review Documents** link. |
| | **3.** Login by entering your e-mail address under the SME label. Click the **Login** button. |
| | **4.** The SME *Document List* screen opens showing all documents that have been uploaded into the system and displaying the functions available to the SME via the SME Menu Bar and associated submenus. |

### Exit

To exit from RevCom, from the menu bar select **Document >> Exit.** Choosing this menu item will close your session with RevCom and you will have to return to the login screen to reenter the system.

# SME: Set Organization

The RevCom system requires each system user to belong to an organization. This is so the system knows where to route the comments. Upon initial SME login, you are directed to select your home organization. You may change your organization through the **Accounts >> Set Organization** submenu.

The following table describes the process to set your organization:

| | |
|---|---|
| **Set Organization**<br><br>Select the organization to send your comments through. | **1.** From the menu bar select **Accounts >> Set Organization** to open the *Set/Change Organization* screen. |
| | **2.** Your current organization is displayed followed by a dropdown box of all organizations. Select an organization and click OK. |
| | **3.** All your comments will be routed to the DPC of the organization you chose as your home organization. |

# SMEs: Working with Documents

## 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, 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.

## Select a Document Version to Work On

You will work on individual versions of the document using the *Document List* screen. To select a version to work on, click **Document >> Select** 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 comments are being resolved and responded to by the OPI.

***Completed***: The list of versions that have completed their review cycles.

***Cancelled***: The list of versions for which the review cycle has been cancelled prior to completion.

***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 SME follows to review the document history:

**Note:** A document version must be selected from the *Document List* screen.

| | |
|---|---|
| **Document History**<br><br>To view the document history. | **1.** From the menu bar select **Document >> History** to open the *Document History* screen. |
| | **2.** 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. |

## References

The *References* screen provides a list of supporting material. The *References* screen shows the document id, title, and issue date followed by the reference title and summary for each supporting reference document.

The following table describes the process the SME follows to review the reference documents:

**Note:** A document version must be selected from the *Document List* screen.

| | |
|---|---|
| **References**<br><br>To view the document references. | **1.** From the menu bar select **Version >> References** to open the *References* screen. |
| | **2.** The system displays the id, title, and issue date of the document version followed by the title and a summary of each supporting document. A reference document may be displayed by clicking on the reference document title. |

## SME: Comment Entry

The main function for the SME is to review a document version, enter comments and submit them to the DPC. To accomplish this function, the SME selects a document version from the *Document List* screen in the *Version Open for Comment* section. There are three subsections, *Assigned* for the documents you have been assigned to comment on, *Not Assigned* for the documents your organization may comment on, and *Other Documents* for the documents your organization is not part of the review.

Once you have selected the document version to review, RevCom will display the *Comment Entry* screen, which is where you will review the version and make your comments on the individual sections. The *Comment Entry* screen shows your user information, the **document version ID and title** linked to the original format (pdf, MS Word, etc. – click on this link to print or review the entire document) of the document being reviewed, and the **due date** for submitting your comments package to your DPC or Delegate.

Below the identifying information for the document version, there is a **No Comments** button that allows you to indicate that your organization has "no comment" on the document version that you are reviewing. If, indeed, you have no comments (i.e., you approve of the document version *as is*), you *must* click on the **No Comments** button.

The *Comment Entry* screen also lists the section headings for each section in the document. The section headings are links to open a section for comment. If the due date for your comments has passed, meaning you will be unable to comment further on the version, the *Section List* screen opens when you select a document version to work on. The *Section List* screen lists the section headings for each section in the document, however, the section headings are not links.

If the list of sections is long, you may use the **Jump to:** box to move quickly to a particular section. You do not have to review and comment on sections in any particular order, and you may return to this document as many times as you like, provided the due date for comment entry has not passed.

### Open a Section to Work On

Select a section to work on by clicking on the section heading link. The work area for the section will be opened and displayed (indicated by an *open folder* icon next to the section title). Click on the **View Section** button on this line to open a new window containing the section text.

The open section work area on the *Comment Entry* screen is divided into distinct sub areas:

- the first sub area is for your own comments and has the **Add Comment** button, and
- the next sub area contains comments from other SMEs in your organization and from your DPC and/or Delegate(s).

Each comment is prefaced with the commenter's name, role and a date stamp for when the comment was entered.

The bottom of the screen contains the comment entry text editor. It displays the section title followed by a **View Section** button. Clicking the **View Section** button opens a separate window displaying the contents of the section. The next line has a pull down box for the type of comment (e.g., “Major” or “Minor”), with **Save** and **Clear** buttons on the far right.

### Entering Comments

To enter a comment on the selected section of the document version, click on the **Add Comment** button near the top of the open section work area. Choose the comment type from the pull down box at the bottom left and enter your comment in the text editor. Click on the **Save** button to save your comment and your comment will appear in the list of comments beneath the section title.

| | |
|---|---|
| **Entering Comments**<br><br>To enter comments by section. | **1.** From the menu bar select **Document >> Select** to open the *Document* List screen. Click on the version title to display the *Comment Entry* screen. |
| | **2.** Click on the section you wish to comment on. The closed folder will open and the text of the section will display in a popup window. The open section will include the DPC name and the date and time a comment was made. |
| | **3.** To add a comment, click on the **Add Comment** button. Scroll to the bottom of the screen and enter your comment in the text editor. Select the comment type, Major or Suggested from the pull down box. If you need definitions for these comment types, click on the **Info** text. |
| | **4.** **C**lick on the **Save** button. Your comment will be added to the open folder section and will be displayed. |
| | **5.** You may edit an existing comment by clicking on the **Edit** button. After you have modified this comment, click on the **Save** button. |
| | **6.** To delete an existing comment, click on the **Delete** button. This removes your comment from the system. |
| | **7.** To view the section text, if you have closed the window or it has been moved to the back, click on the **View Section** button. |
| | **8.** If you or your organization has no comments for this document, click the **No Comments** button. |

**Note:** Remember, if you do not have any comments, you must click the **No Comments** button.

## Submitting Comments

After you have entered your comments (or you have clicked the **No Comments** button), you need to submit your comments to your organization's DPC.

The following table describes the process to submit your comments:

| | |
|---|---|
| **Submit Comments**<br><br>Submit your comments to the DPC. | **1.** After all comments to all sections are entered, you are ready to submit your comments to the DPC. From the menu bar select **Version >> Submit Package**. |
| | **2.** The system will refresh the screen and a "Comments submitted" message appears at the top. |

**Note:** Remember, even if you have no comments, you must click the **No Comments** button and submit your comments.

# SME: Section List

Document versions that are in the “Other Documents” under “Version Open for Comments” status grouping, or any document version under the “Version Comment Response”, “Version Completed” or “Version Cancelled” status groupings of the Document List screen are not open to you for entering comments because either you are not assigned to the version or the comment entry period is over (i.e., the review is in response phase or has been completed or cancelled). When you click on the title of such a document version, RevCom will bring up the Section List screen. This screen lists the sections of the document version you selected; each section title is a link to display the contents of that section.

| | |
|---|---|
| **View Sections**<br><br>View the list of section titles and section contents. | **1.** On the *Section List* screen, click on a section title to open the section for viewing the section contents. |
| | **2.** Click on the section title again to close the section. |

# Reviewer Reports

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

## Quick Reports

The DPCs, Delegates and SMEs can generate predefined reports, that is, reports that have pre-selected options, for a selected document from the Quick Reports. There is also a **Build Report** option that lets you create your own *ad hoc* custom reports of the comments for a particular document.

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

| | |
|---|---|
| **Report: Quick**<br><br>View commonly requested predefined reports. | **1.** From the ***Reports Menu*** select **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 DPCs, Delegates and SMEs can generate ad hoc reports for a selected document by generating a Custom Report. Choices for report criteria include type of comment (Major or Suggested), organization, levels, resolution, and selections to display.

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

| | |
|---|---|
| **Report: Custom Report**<br><br>Create your own report. | **1.** From the **Reports Menu**, select **Custom** to open the *Custom Report* screen. |
| | **2.** Scroll through the screen and select desired reporting criteria. |
| | **3.** Press **Submit** to generate the customized report. |

## 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 view is centered on the current date.

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

| | |
|---|---|
| **Report: Planner**<br><br>Gantt chart view. | **1.** From the Reports menu select Planner to open the Document Planner screen. |
| | **2.** Choose a different reporting period by clicking on the number of months desired. |

## 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 the Reviewer follows to obtain a Document Status report:

| | |
|---|---|
| **Report: Document Status** | **1.** From the **Reports Menu**, select **Document Status** to generate the *Document Status* report. |
| | **2.** Scroll up and down to review the Document Status. |