QUICK GUIDE REVIEW & RELEASE DOCUMENTS



REVIEWING DOCUMENTS

- Click Document / Dashboard ∨ ► select Documents
 ► Review.
- 2. Click on a document number to open.

DOWNLOADING ATTACHMENTS

- 1. Select the Detail tab.
- Click the checkbox next to the required document ► select ↓.

File Name	Extension	Size	
Level 20 Electrical Plan(A)	pdf	31 KB	\otimes

Note: you can also click this icon \downarrow in the register.

ADDING COMMENTS & ATTACHMENTS

- Select the Comments tab ► use the + button to add comments.
 Note: you can also click this icon + in the register.
- 2. Enter a comment and choose a category.
- 3. Select 🕂 Attach files 🕨 choose the file.
- 4. Select save.

• COMPLETING THE REVIEW

 Select the document checkbox ► select Complete button Complete ▼.

- RELEASING DOCUMENTS
- 1. Click Document / Dashboard ∨ ► select Documents ► Release.

VIEW REVIEWER COMMENTS

- 1. Click the 🖳 icon.
- Click Select reviewer comments to include with your summary.
 ▶ select comments to be visible when released ▶ select close.
- 3. Enter a comment and choose a category
- 4. Select save.
- 5. Click Send comments to dropdown ► choose the checkbox/s.

Send co	mments to:	-
it here to group by		Originator
		Reviewers
(III)	Reviewer o	Document Recipients

COMPLETING THE RELEASE

1. Select a status from the Review status column.

Rejected Released Released with Comments Revise and Resubmit

2. Click the Document checkbox ► select Release button Release .

MANAGING REVIEW WORKFLOW

- 1. Click Document / Dashboard ∨ ► select Documents ► Manage workflow.
- Locate the document in the list ► select the Workflow members button 2.

ADDING ADDITIONAL REVIEWERS

- 1. Select a **Company** from the dropdown.
- Click the checkbox next to the additional member/s select the arrow → .
- 3. Choose the Sequence number & Duration (Days).

Sequence	Duration (Days)		
1 🛔	1	*	

Note: You can also set a Due Date and make the viewers Optional & Either.

4. Select save.

NEED SOME MORE HELP?



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