INEIGHT

REVIEW AND APPROVAL USER GUIDE

DOCUMENT

Release 25.9

Revision: 1

Last Updated: 03 October 2025

Information in this document is subject to change without notice. Companies, names and data used in examples are fictitious.

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Revision: 1
Last Updated: 03 October 2025

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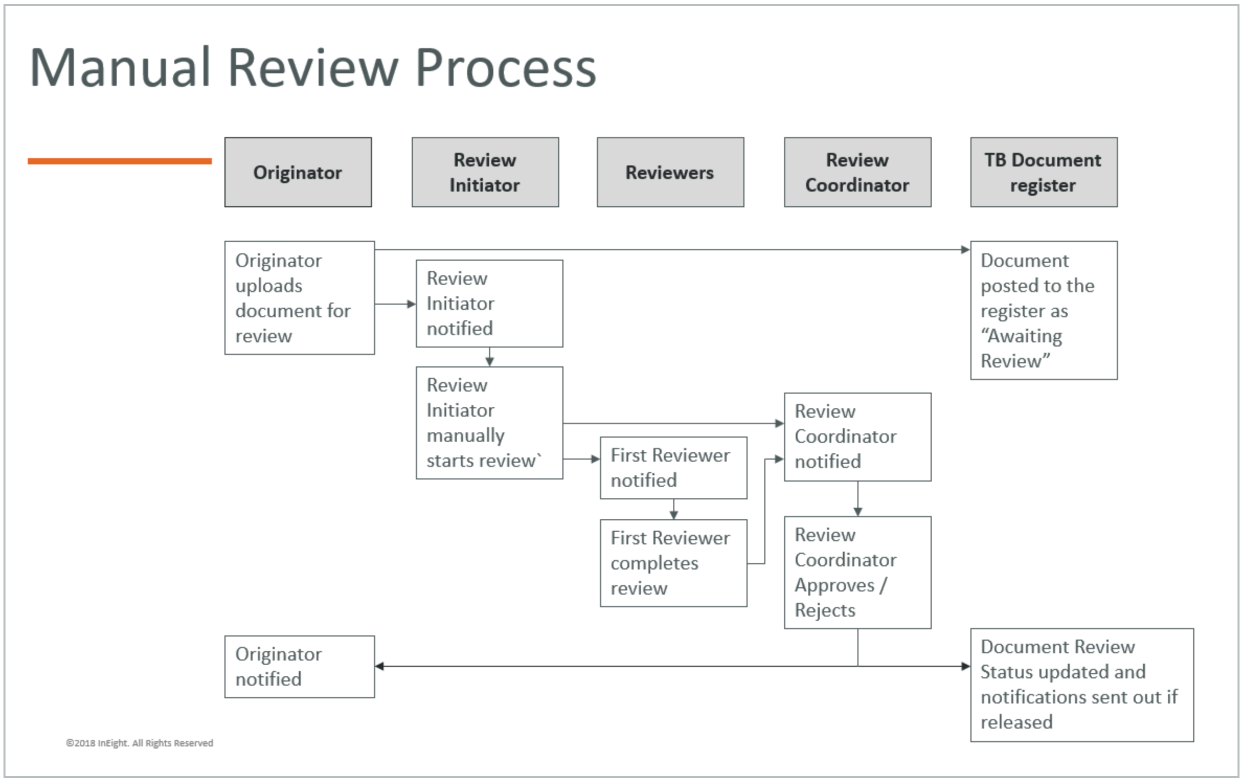
1.1 OVERVIEW

There are 8 steps in the Document Review (manual workflow) process once a restrained document[1] is uploaded to InEight Document:

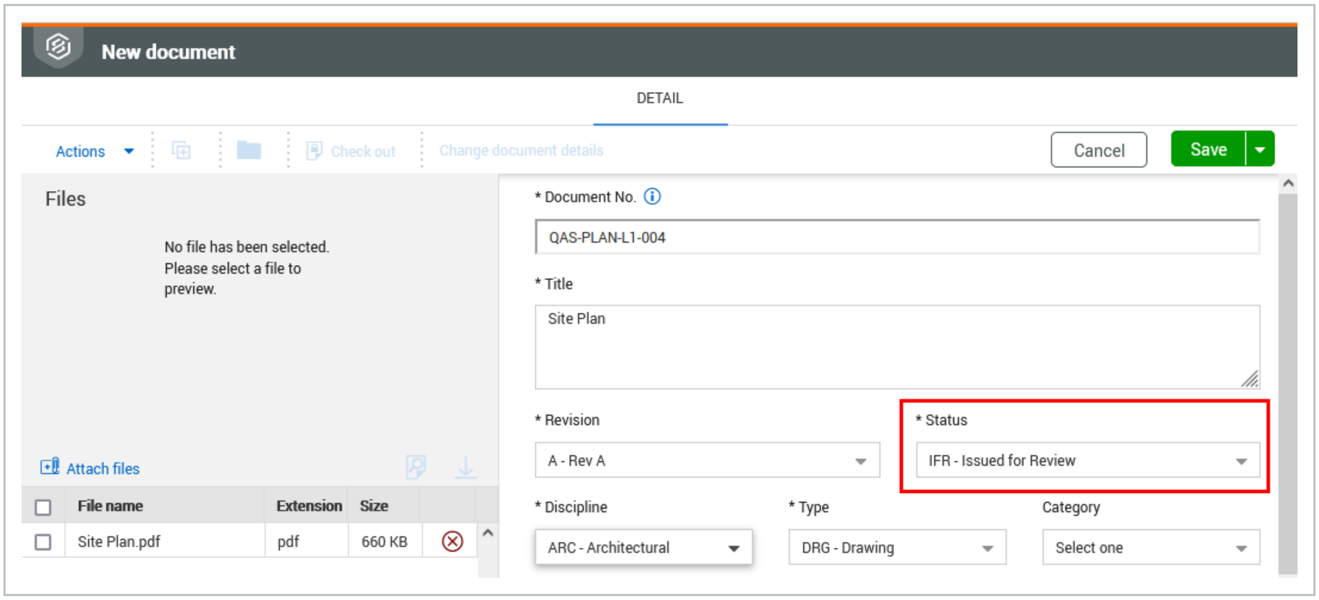
[1]To be passed through a workflow.

1. The **Review Initiator** receives a notification that a restrained document has been uploaded.
2. The **Review Initiator** activates the workflow for one or more documents to their default review teams (these can be edited as required).
3. The **Reviewers** are notified in turn or at the same time depending if the review is being performed in series or in parallel (as controlled by the sequence against each reviewer in the review team).
4. The **Reviewers** complete their review using the Document Review screen by redlining, and/or commenting on the documents. If the project setting Enable editing of redlines and comments before release is enabled, the review coordinator can edit comments and markups from other reviewers before release.
5. The **Review Coordinator** receives a notification once **ALL** reviewers have completed their review.
6. The **Review Coordinator** then performs their own review using the Document Release screen, selects which Review comments to include and applies a Review Status which controls whether the document is released or rejected.
7. Notifications on the outcome of the review are sent to the Originator and/or Review team members.
8. If Released, the Document is distributed in InEight Document automatically as normal. If rejected, a notification will be sent to the originator, and they will make any corrections and re-submit for review.



1.2 UPLOAD OF DOCUMENTS FOR REVIEW

Documents requiring review are uploaded in the same way as any other document in InEight Document. The status assigned by the uploading company determines if the document is restrained (to be passed through a workflow) or unrestrained (without going through a workflow).



Documents uploaded to InEight Document that are restrained are posted to the document register with a review status of **Awaiting Review/Release.** A restrained document can only be accessed by the review initiator and project administrators. Once the workflow is activated, the document can also be accessed by the review coordinator and review team members.

NOTE

- If Auto Activation of the review process is enabled, the first reviewer in the relevant review team is automatically notified to complete their review. For Parallel based reviews, each reviewer is notified at once.
- If the workflow is Manual (auto Activation was not enabled), the Review Initiator assigned for the rule group is notified that a restrained document or group of documents has been uploaded and the workflow requires activation.
- If a restrained document is uploaded that does not have a review team defined, the Review Initiator will be notified with a CC to the Project Administrator.

1.3 ACTIVATING A DEFAULT WORKFLOW

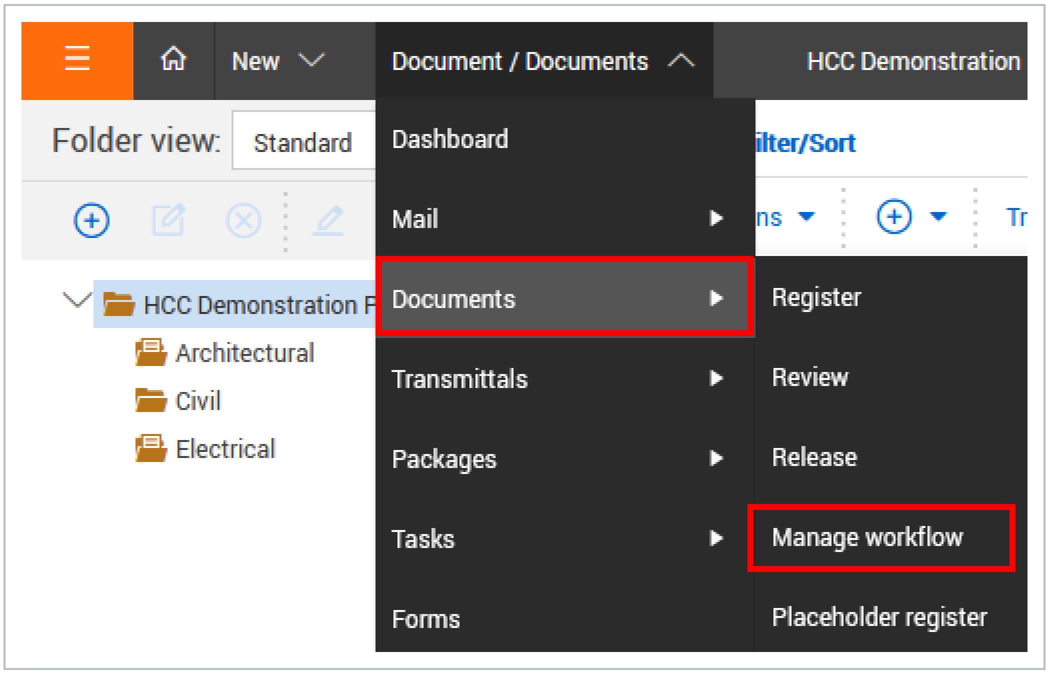
The Review Initiator can activate the manual workflow to the default review team which can be edited as required.

ACTIVATE A DEFAULT REVIEW

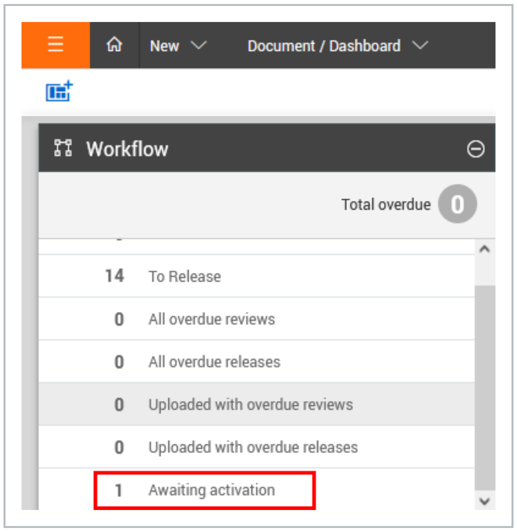
Summary: Activate a default workflow to select a predefined group of reviewers that will review one or more documents.

Considerations: The review initiator can activate the workflow on a per document basis or for a batch of documents.

1. From the Module Menu, hover over Documents, and then select **Manage workflow**.

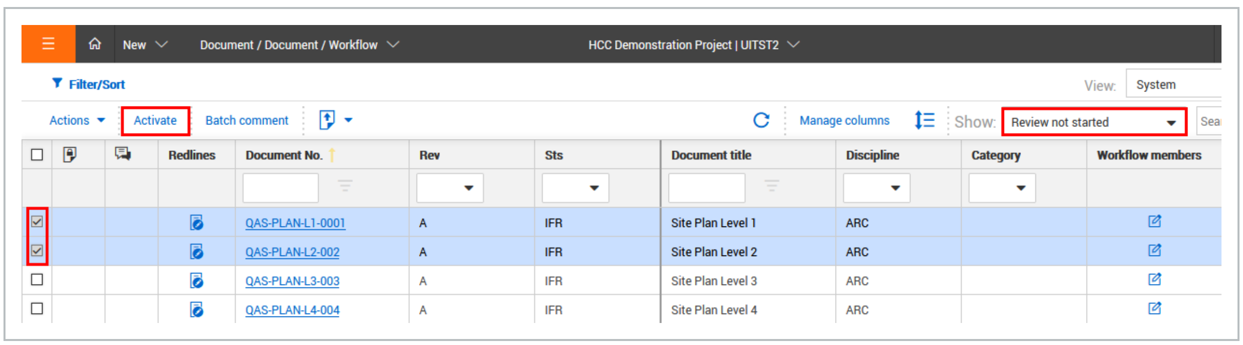


Alternatively, from the Dashboard Workflow tile, select **Awaiting activation**.



The Manage Document Workflow page opens.

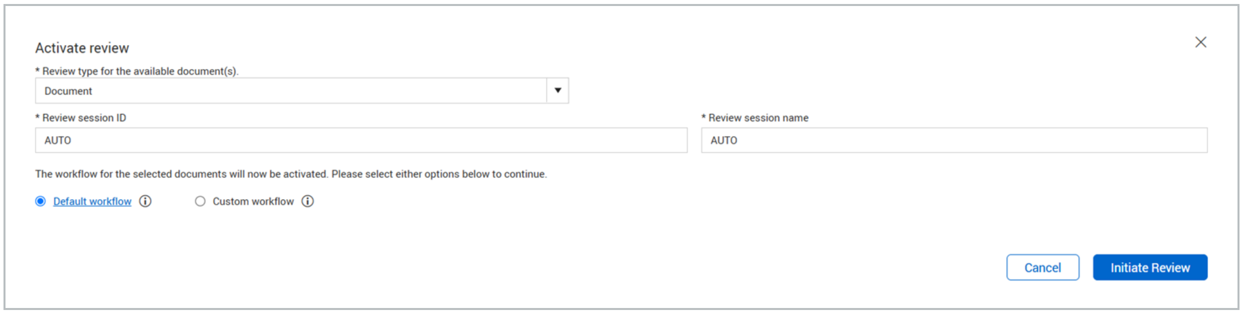
2. Verify that the Manage Document Workflow page view is set to *Review not started*. Select the documents you want to send through the review process.



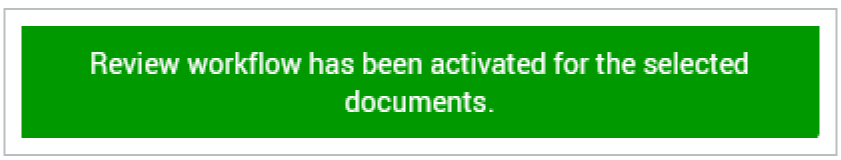
3. Click the **Activate** button. The Activate review dialog box opens.

4. From the Review type for the available documents drop-down list, choose the review type for the documents. If the documents will be reviewed using one of the possible integrations, such as to Bluebeam or Microsoft Office, select the applicable review type. If the documents are to be reviewed in Document, select **Document**.

   The system selects applicable review types based on the file type and the integrations available on a project.



5. If applicable, enter the review session ID and the review session name. The system also applies these values automatically, so the project can use a predefined session ID format. These values help identify the review documents and can be used in filtering or grouping documents.
6. Select the option **Default Workflow** as the workflow type, and then click **OK**.
7. The review process will be activated using the rules based review team each document relates to.



NOTE

- You can organize the register to show workflows in groups for easy reference. To group entries, drag the column header to the gray bar above the register. You can drag multiple columns to the bar to create groups within groups. You can also click the column headers to switch between ascending and descending order.
- The first reviewer (for serial reviews) or all reviewers (parallel reviews) will be notified by email to complete their review.
- The default rules based review team can be modified during the activation process by clicking the **Add/Edit** link at the **Manage Document Workflow** page. The changes only apply to the document against which you clicked Add/Edit. After saving, a prompt to activate the workflow for this document shows.
- If a restrained document that has been released is edited by the originator by adding an additional view file, even if the revision or status are not changed, the document is automatically available for workflow activation again. When activated in this scenario (that is, the revision has not changed) the workflow will be considered as Level 2.
- If the option is enabled, the Review Initiators can Release or Reject a document prior to activation of workflow.
- When you activate workflow for documents that have the same review team, Document automatically generates a unique tag for the documents in the workflow. The tag shows in the Tags column in the Review or Release register for you to use to filter the register to quickly find all documents in the workflow.

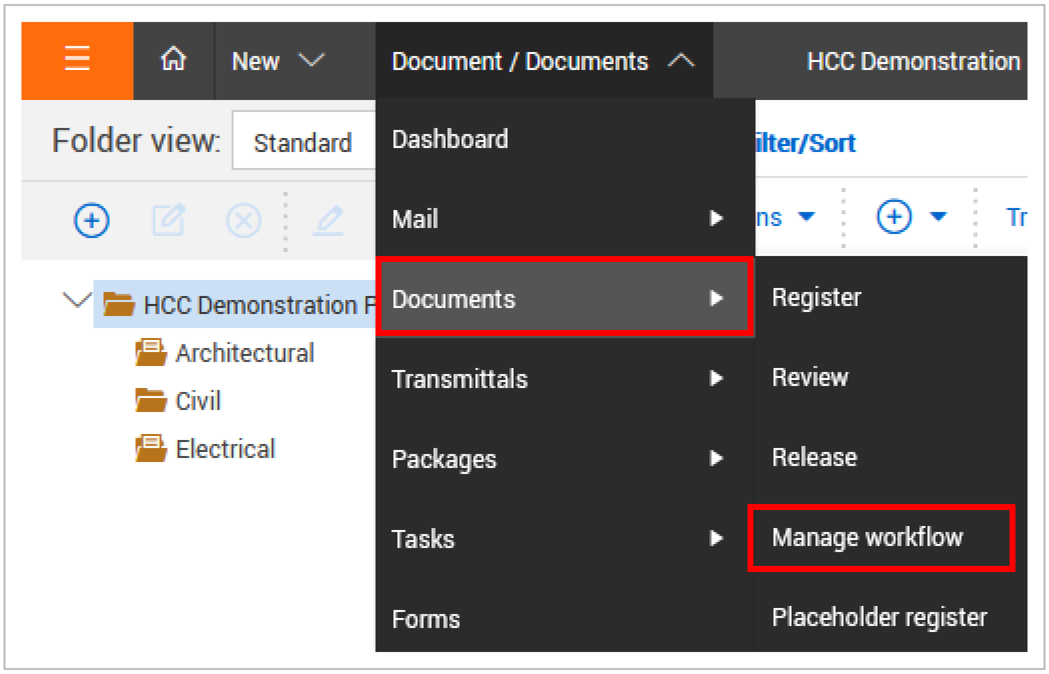
1.4 ACTIVATING A CUSTOM WORKFLOW

The review initiator has a choice of using the default rules based review team or using a custom workflow that can be defined from scratch or based on a predefined free-form review team.

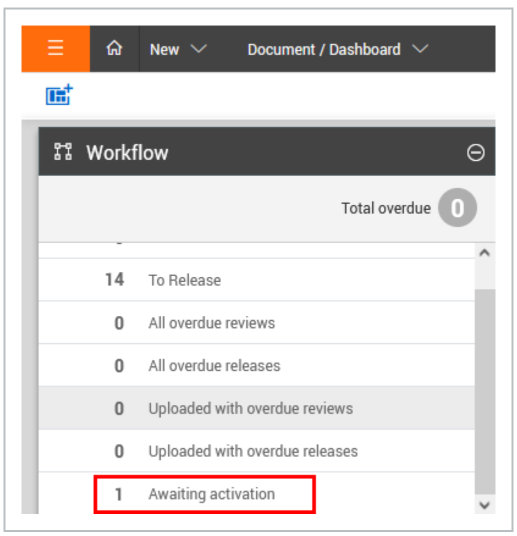
ACTIVATE A CUSTOM WORKFLOW

Summary: Activate a custom workflow to create an ad hoc review team to review one or more documents.

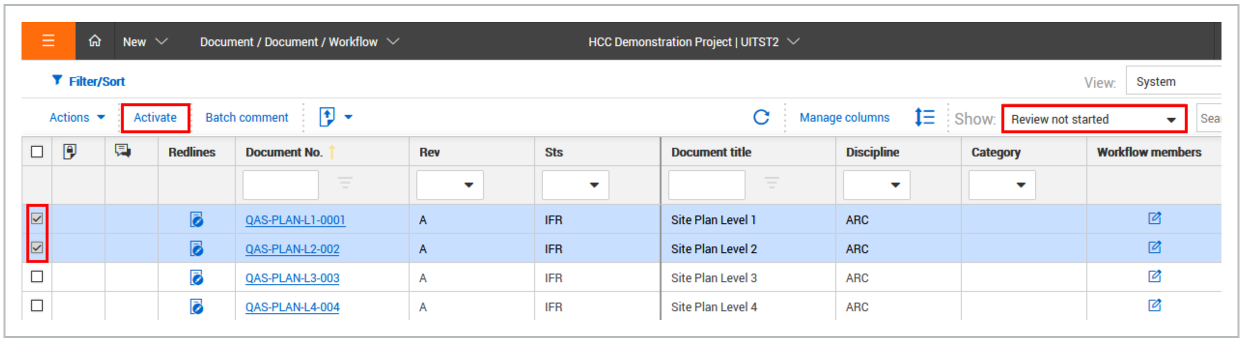
1. From the Module Menu, hover over Documents, and then select **Manage workflow**.



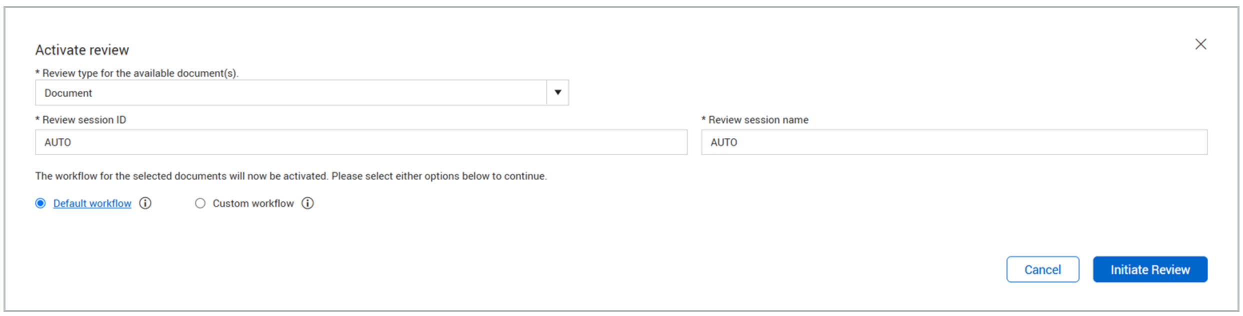
Alternatively, from the Dashboard Workflow tile, select **Awaiting activation**.



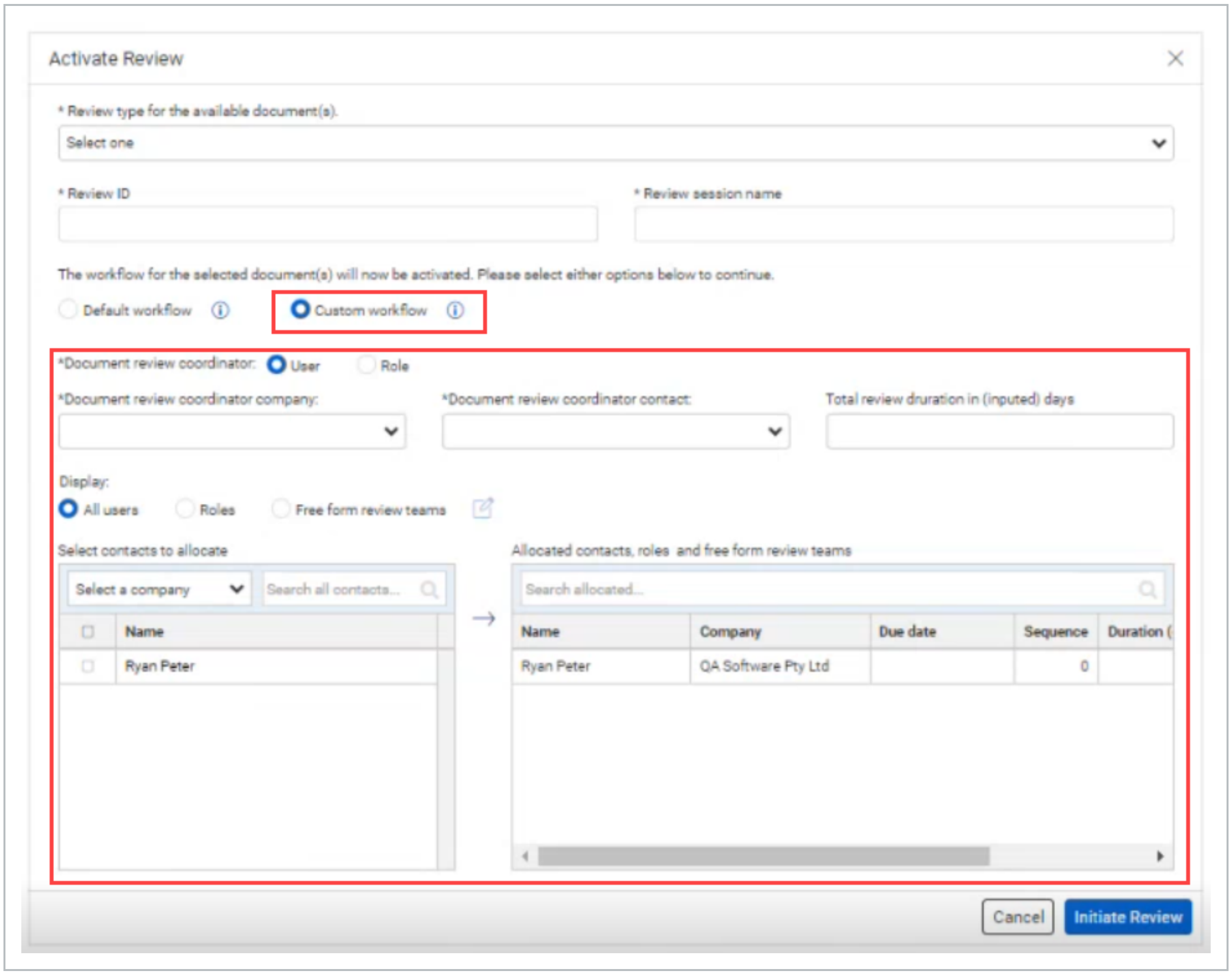
2. Verify that the Manage Document Workflow page view is set to *Review not started*. Select the documents to activate the review process.



3. Click the **Activate** button.
4. From the Review type for the available document(s) drop-down list, choose the review type for the documents. If the documents will be reviewed using one of the possible integrations, such as to Bluebeam or Microsoft Office, select the applicable review type. If the documents are to be reviewed in Document, select **Document**.

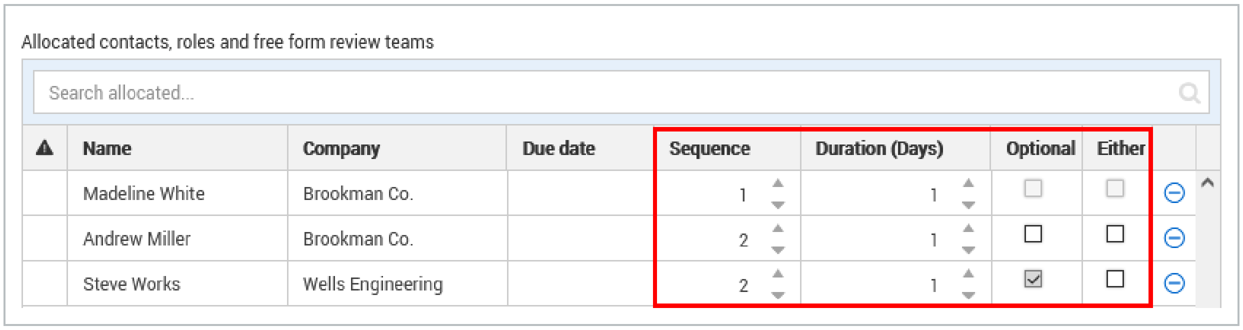


5. If applicable, enter the review session ID and the review session name. The system also applies these values automatically, so the project can use a predefined session ID format. These values help identify the review documents and can be used in filtering or grouping documents.
6. Select the option **Custom Workflow** as the workflow type. The dialog expands to show workflow options.



If the documents selected all relate to the same rules based review team, the Review Coordinator will be auto selected at the review team members window. The default review members will be listed, these can be altered if required.

7. Select the **Review Coordinator** or **Role** for the Review.
8. Select the **Reviewers** to make up the review team. use the Company drop-down list to select the company the reviewers belong to. Then move the relevant contacts to the right hand pane.
9. Repeat the above step for any reviewers from other companies.
10. Enter the required **sequence** and **review duration** for each reviewer.



11. Enter the **Total** Review Durations for the review.
12. Click **Save** to activate the workflow and click **OK** at the confirmation message.

NOTE

- You can organize the register to show workflows in groups for easy reference. To group entries, drag the column header to the gray bar above the register. You can drag multiple columns to the bar to create groups within groups. You can also click the column headers to switch between ascending and descending order.
- Instead of selecting reviewers directly from the address book, you can select them via Free Form Review teams or roles already defined. Users can be removed or added to the list as required.
- The reviewers are notified in order of sequence to complete their reviews.
- When you activate workflow for documents that have the same review team, Document automatically generates a unique tag for the documents in the workflow. The tag shows in the Tags column in the Review or Release register for you to use to filter the register to quickly find all documents in the workflow.

1.5 MODIFY AN IN-PROGRESS WORKFLOW

A workflow can be modified once it has been activated. You can add or remove reviewers, change the sequence or durations of the reviewers, or reactivate a completed reviewer.

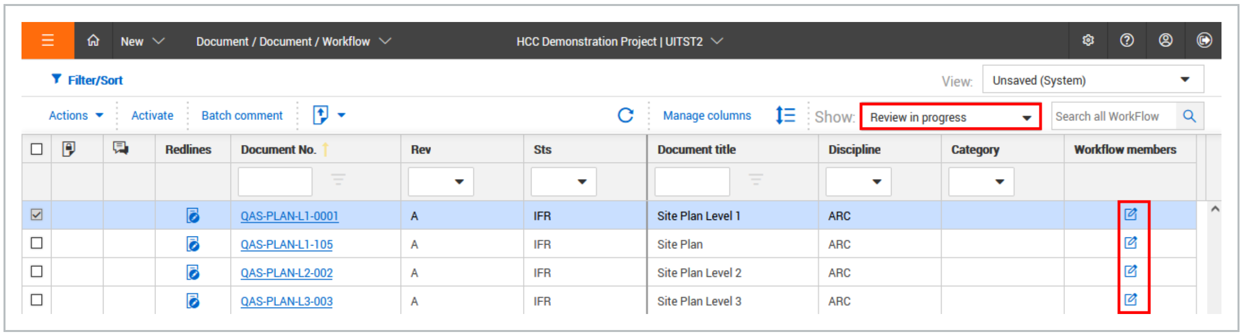
MODIFY AN IN-PROGRESS WORKFLOW

Summary: Modify an in-progress workflow when you want to add, remove, or reactivate reviewers.

1. From the Module menu, hover over Documents, and then select **Manage workflow**. Alternatively, from the Dashboard Workflow widget, select **Awaiting activation**. The Manage

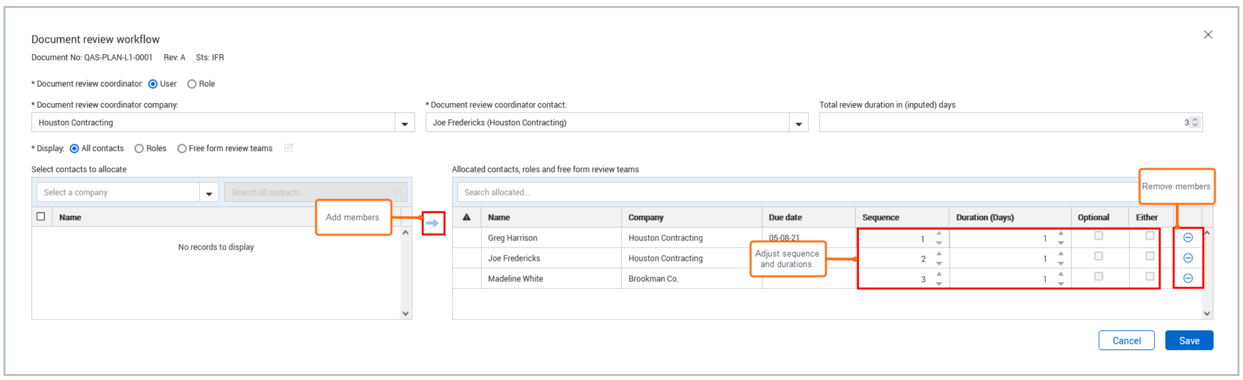
Document Workflow page opens.

3. Change the Show option to *Reviews in progress*.
4. Click **Edit** icon for the document to modify the workflow.



The Document review workflow dialog box opens.

5. Add or remove members from the workflow or modify the sequence and durations for each reviewer as required. Reviewers who have completed their review cannot be removed or adjusted.

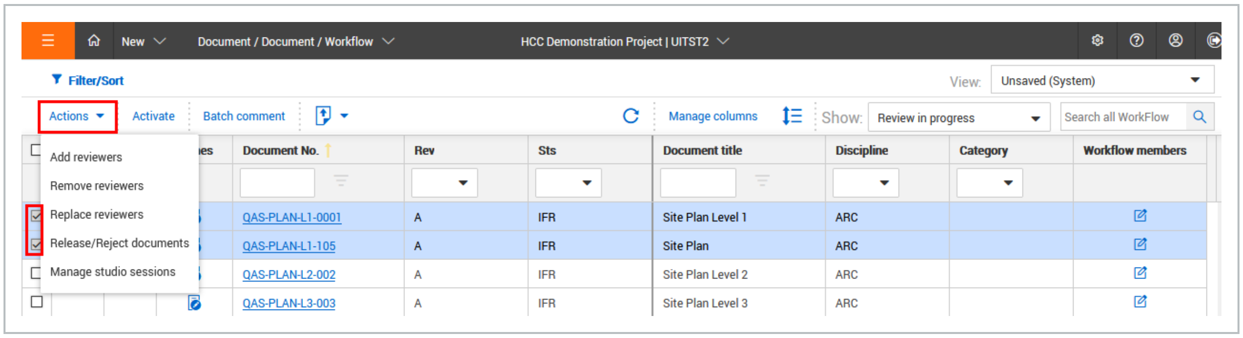


6. Click **Save**.

ADD, REMOVE, OR REPLACE REVIEWERS IN BULK

Summary: You can add, remove, or replace reviewers in bulk to save time when you have to make the same changes for multiple reviewers.

1. From the Manage Document Workflow page, select the applicable workflows, and then expand the **Actions** menu.



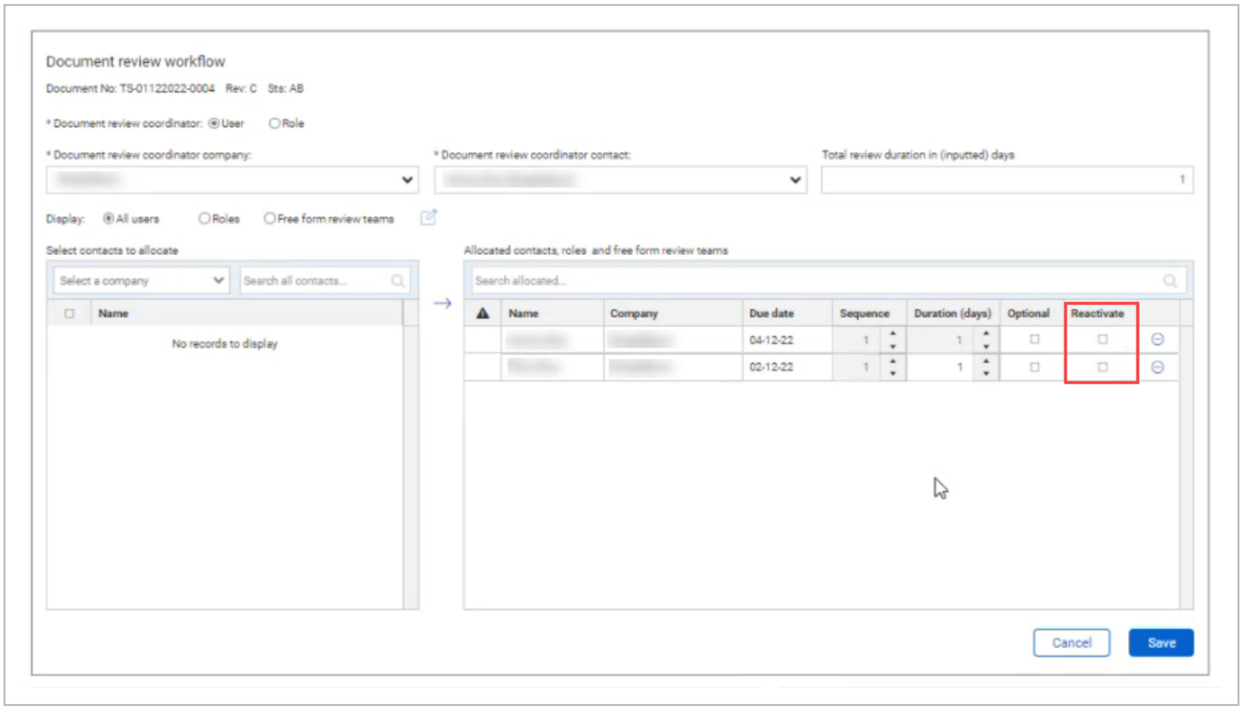
2. Select the action:
   - **Add Reviewers:** Add one or more reviewers to the in-progress workflow for the selected documents.
   - **Remove Reviewers:** Remove users or roles as reviewers if they have not reviewed the selected documents.
   - **Replace Reviewers:** Replace one reviewer with an alternative reviewer for the selected documents, subject to the reviewer being replaced having not reviewed the documents. You can replace a reviewer with a user or a role.

REACTIVATE A COMPLETED REVIEWER

Summary: You can reactivate a completed reviewer if that reviewer needs to return to the document to make additional comments or redlines.

Considerations: A reviewer can be reactivated only when the workflow is in the same workflow step.

1. On the Manage Document Workflow page, change the Show option to *Reviews in progress*.
2. Click the **Edit** icon for the document to modify the workflow. The Document review workflow dialog box opens.
3. Select the **Reactivate** check box for the reviewer you want to reactivate.



4. Click **Save**.

1.6 REVIEWING DOCUMENTS

Reviewers receive an email notification advising of documents that require their review by a required date. The reviewers then review the documents either on-line or by downloading and printing them for manual mark up.

Each reviewer must complete their Review using the **Document Review** page to record their review comments into the system. The Review screen can be used to:

- Mark up the drawings online
- Make text comments against the document online
- Attach an external file, for example, an Microsoft Word document of comments
- Attach a scanned copy of a hard copy mark-up

The Review page is also used to indicate that a reviewer has completed their review and the date. An email notification is then sent to the next reviewer in sequence and a notification is sent to the review coordinator informing the reviewer has finished.

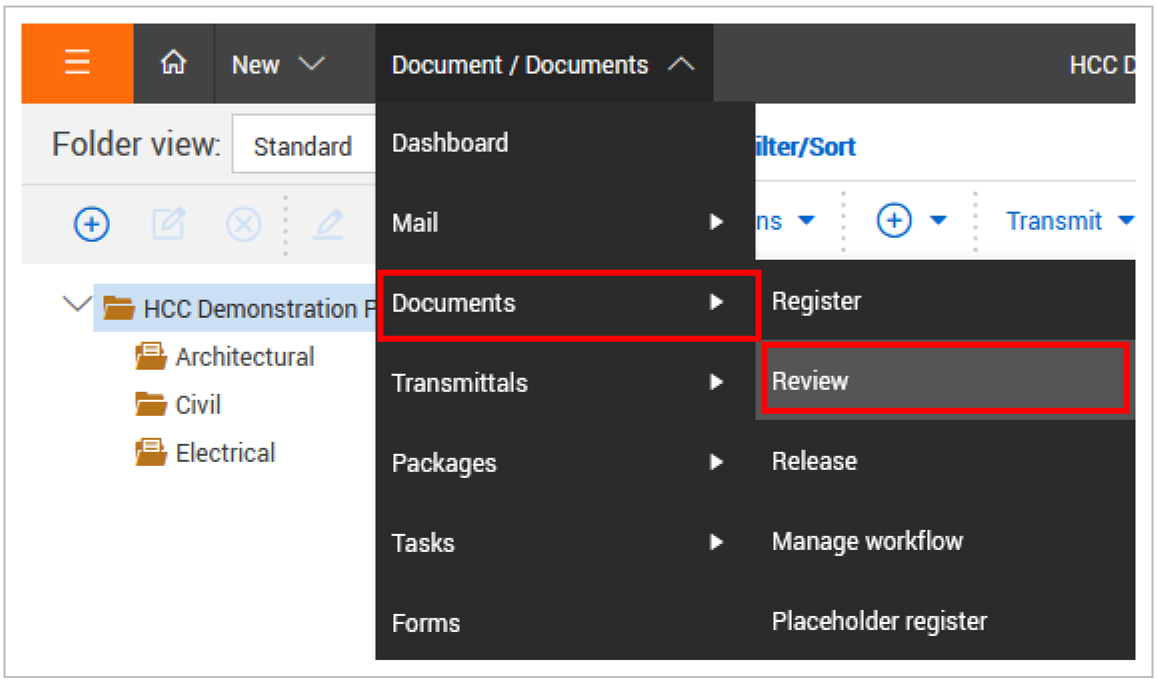
REVIEW A DOCUMENT

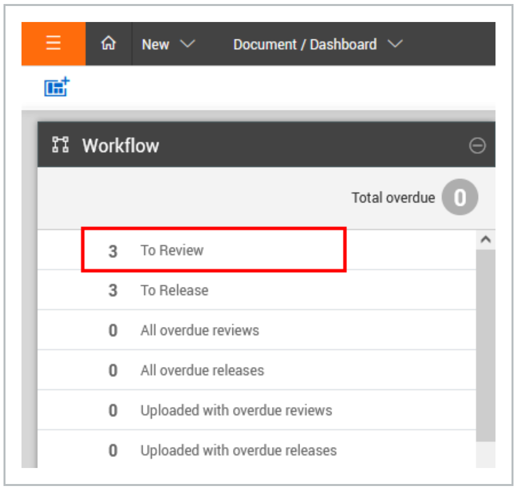
Summary: You can review documents assigned to you from the document review screen.

Considerations: InEight Document has been fully integrated with Bluebeam Studio to enable document reviews via Bluebeam rather than the Online Viewer tool. Contact InEight for details.

Review Coordinators showing “Where I am the review Coordinator” option enables a Review Coordinator to perform a proxy review on behalf of another reviewer. This might be necessary if a reviewer is unable to review a document for any reason, and the review process might otherwise be held up.

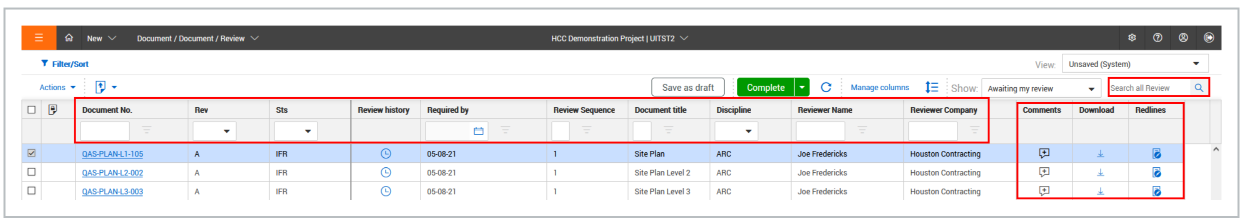
1. From the **Module Menu**, hover over **Documents** and select **Review**. Alternatively use the hyperlink in the **Workflow** Widget on the Dashboard .





The review register opens.

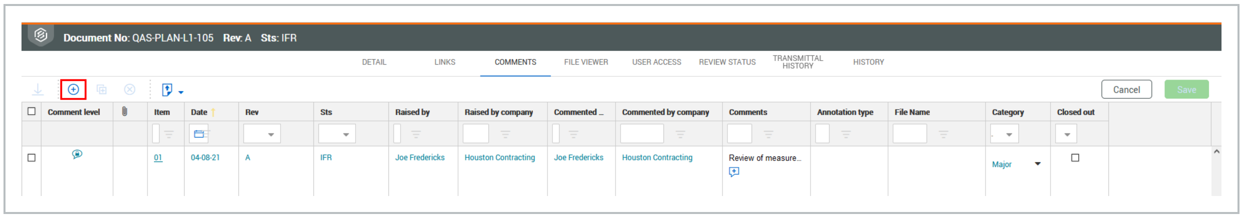
2. Locate the documents you want to review. If there are many documents awaiting review, use the Search box or filters.



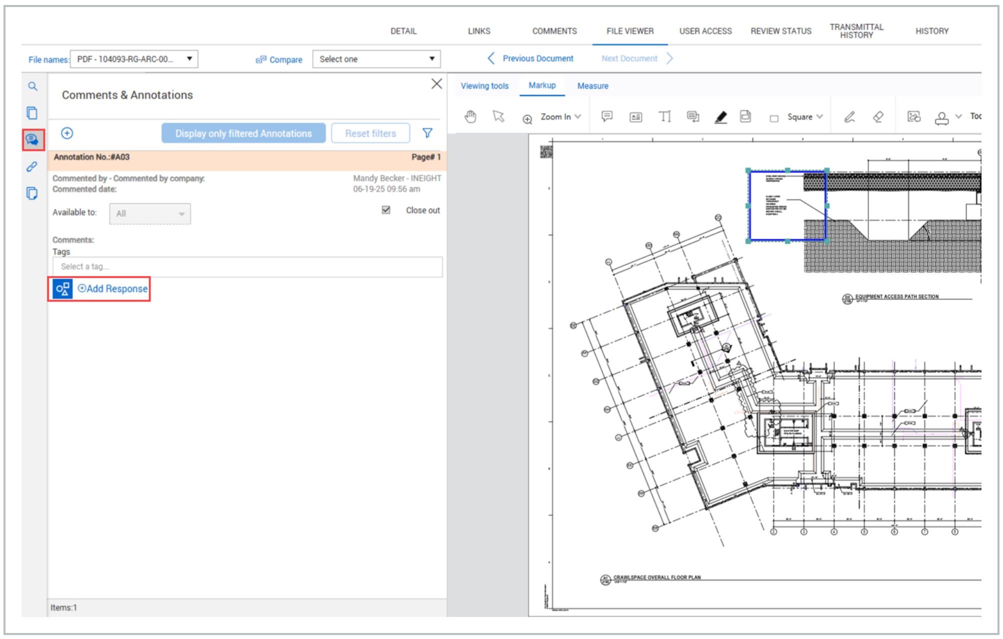
The review window can be customized to control the columns that are displayed by clicking **Manage Columns**.

> **NOTE** If you are a review coordinator, when viewing the *All* or Where I am the review Coordinator option, the Reviewer and Review Company columns also show in the register.

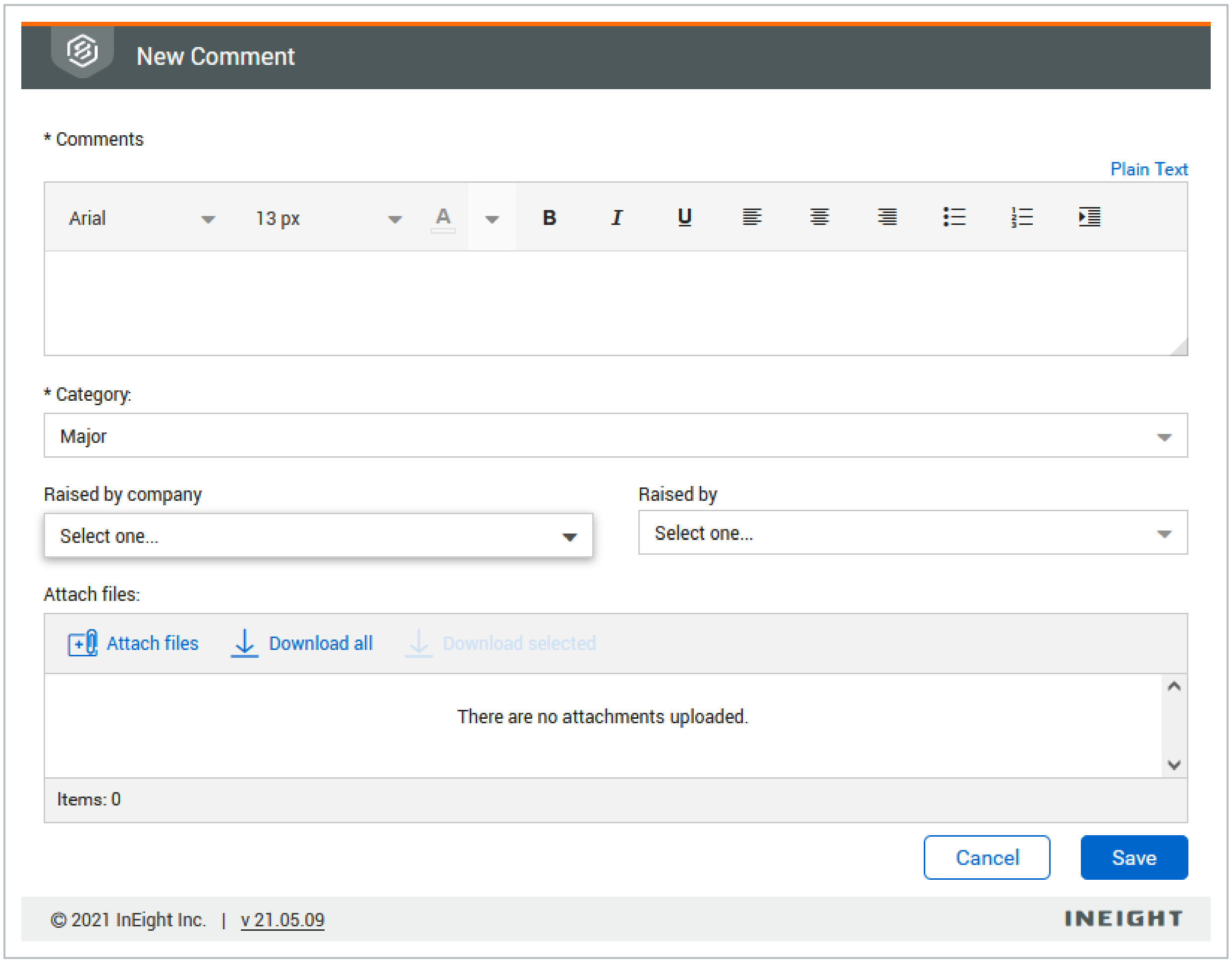
3. Click the **Redlines** icon of the document you want to review to open the document in the online viewer (if activated on your project). The document can be marked up, and text comments can be added (see "PDF viewer toolbars").
4. Click the **Comments** icon to add electronic comments to the documents.
5. In the new window, click the **plus** button to add a comment.



To add a response to an existing comment, right-click on the annotation, and then click **Add Response**. Alternatively, you can click the **Comments** icon to open the Comments and Annotations panel, and then click **Add Response**.

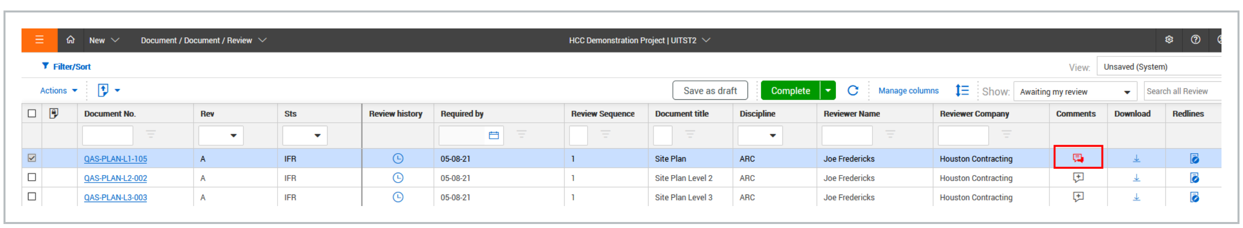


6. Attach external files if needed. Click **Attach Files** and select one or more files to attach and click **Open**.

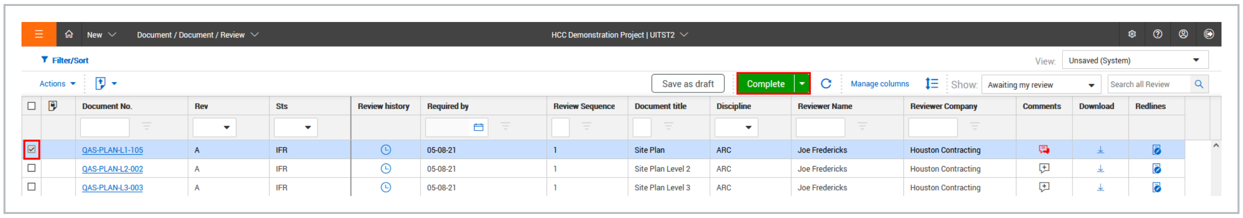


A comment raised on behalf of a third party is specified in the Raised by value. You can also select a **Category** for your comment, if applicable.

7. Click **Save** when finished to return to the Comments window and close the window to return to the Document list in the Review register. The comment icon changes to a red icon to indicate that there is an outstanding comment against the document.



8. After your reviews are complete,select the Documents in the Document Review register, and then click **Complete**.



The document continues to be listed as *Awaiting review* until the **Completed** box is selected and saved. Document sends out automatic reminders via email if reviews are not completed by each reviewer within the predetermined durations.

What's next: On completion of the review, the next reviewer is notified to complete their review (serial workflows).

When all reviews are complete, the review coordinator is notified. When there is a serial or parallel review workflow, the review coordinator is notified that all reviews have been completed after the last reviewer completes their review.

1.6.1 Bypass the review workflow

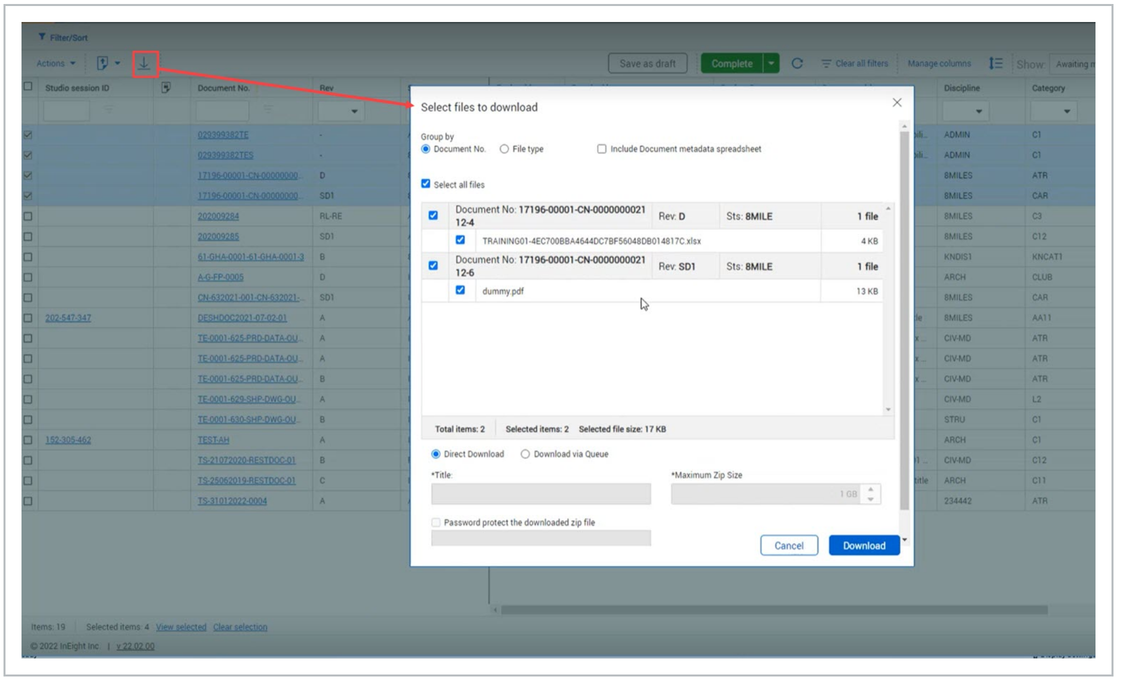
To bypass the workflow process, a reviewer can select Complete > **Send to review coordinator** from the Document Review page. When this option is selected, Document Completes the workflow process and passes control of the document to the review coordinator, bypassing all other reviewers who have not yet completed their reviews.

1.6.2 Offline reviews

Sometimes it might be necessary to conduct reviews offline. You can download one or more documents to a PC for either printing or offline review. If the hard copy is marked up, scan and upload as an attachment.

- To download a single document, click the **Download** icon to download the document
- To download multiple documents, click the **Download** icon in the toolbar, and then select the

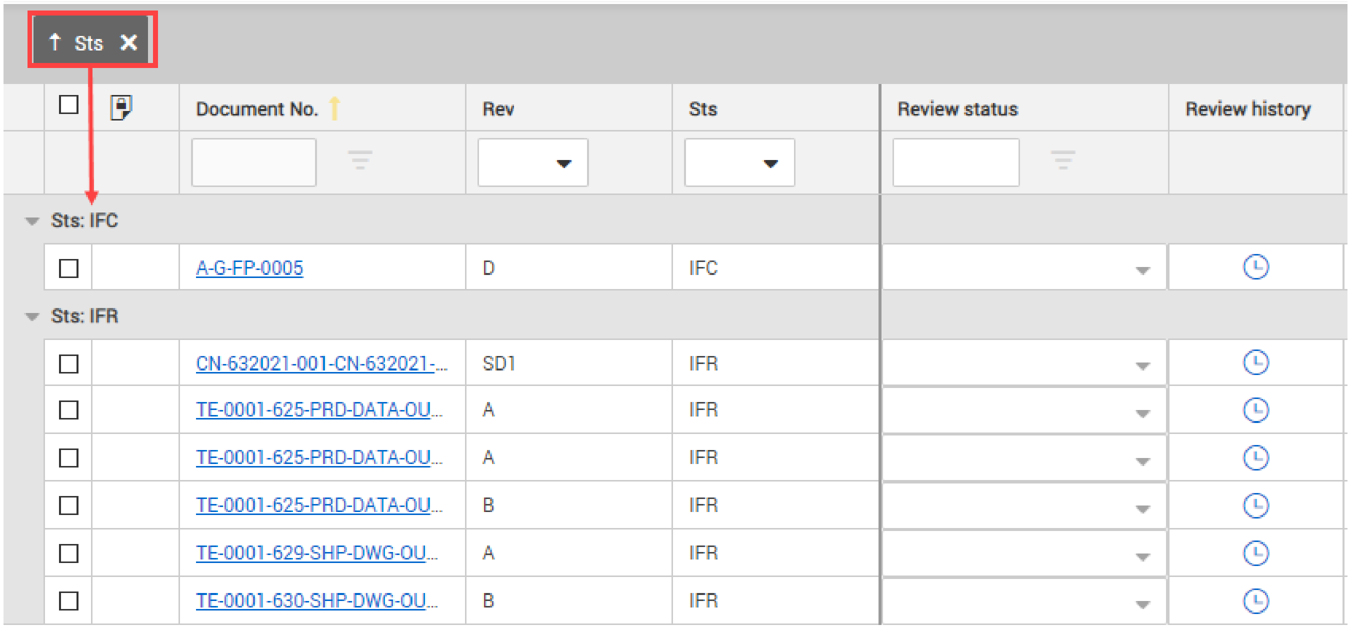
files from the Select files to download dialog box.



1.6.3 Group items in the Document review register

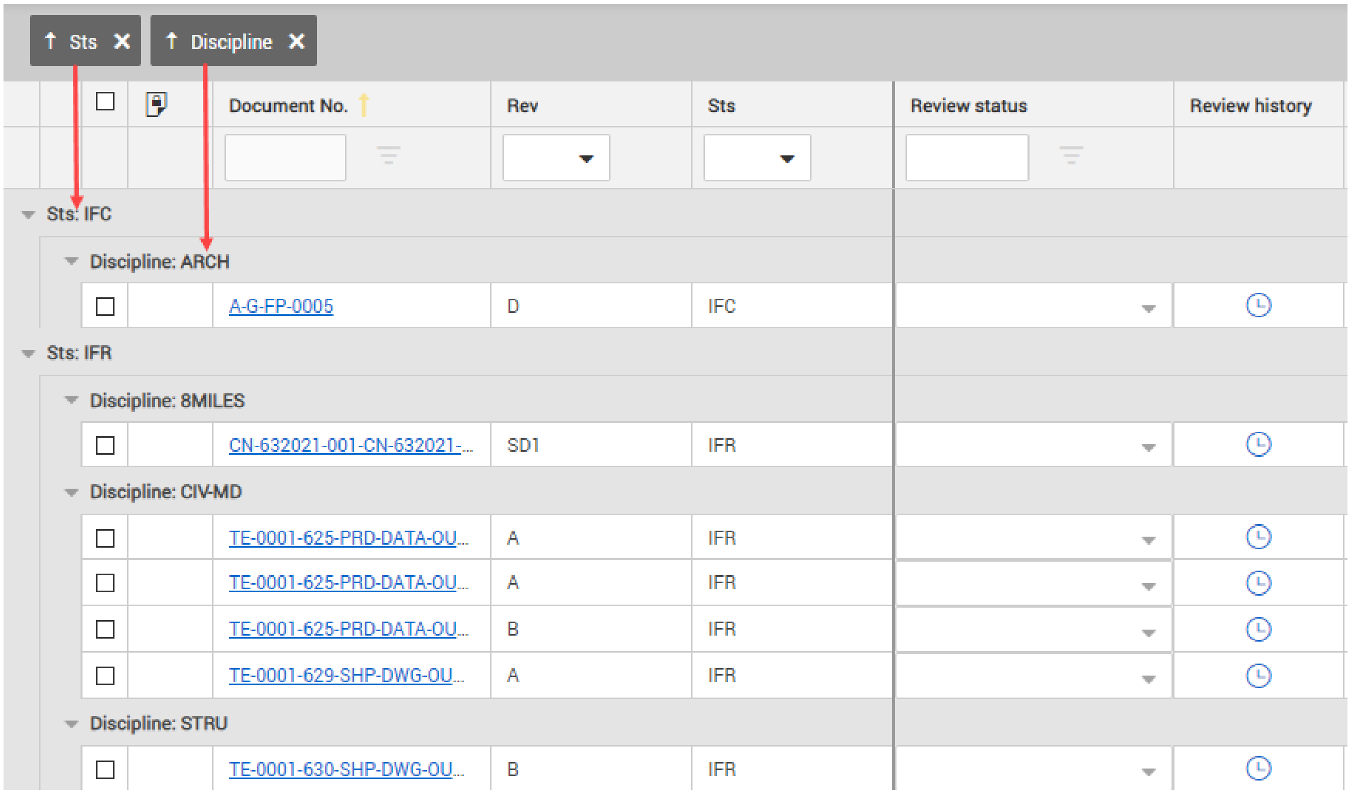
You can group entries in the Document review register by available register columns to help you quickly locate documents.

The grouping tool, which is shown as a gray bar above the column headings, lets you drag and drop a column heading to group by that column. For example, if you drag the Sts column to the bar, the documents are grouped by status. In the image below, the documents are grouped by status in ascending order. The documents with no status would come first, followed those with IFC status and then those with IFR status.



You can click the arrow next to the column name in the tool to change the order from ascending to descending. You can expand and collapse the groupings, so you can find the document you are looking for quickly.

To use multiple groups, you can drag multiple column headings to the grouping tool. The documents are grouped in the order the headings are placed in the tool. For example, if you were to add the Discipline column to the scenario above, the documents would be grouped by status and then discipline within the status.

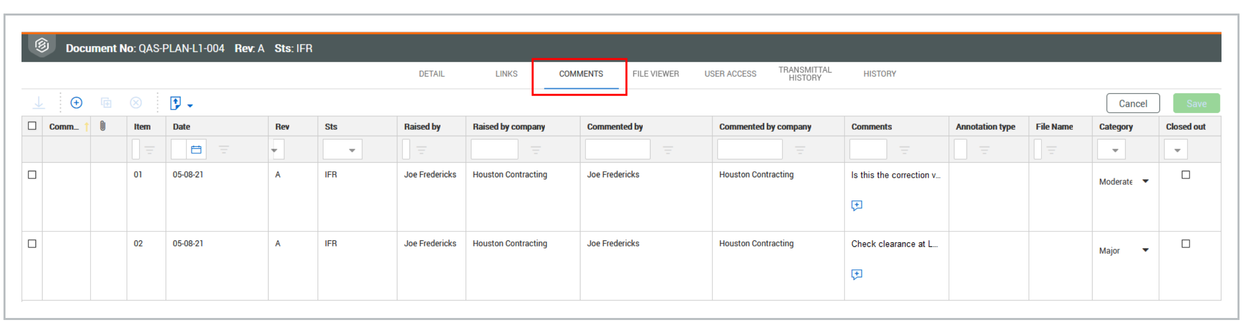


1.7 COMMENTING ON DOCUMENTS

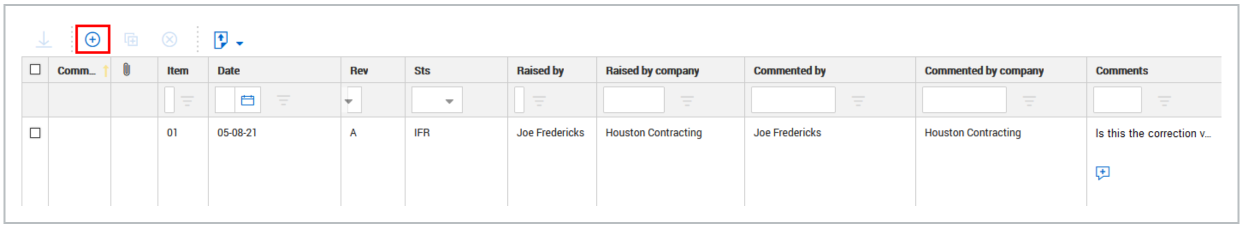
If you have access to a document, it is possible to make text comments about the document from within the document register. Comments can be either added from within the document details window or from within the File Viewer.

To comment on a document:

1. From the **Document Register**, locate the document to comment on.
2. Click on the Docunoment No. link to open the details screen.
3. Select the **Comments** Tab.

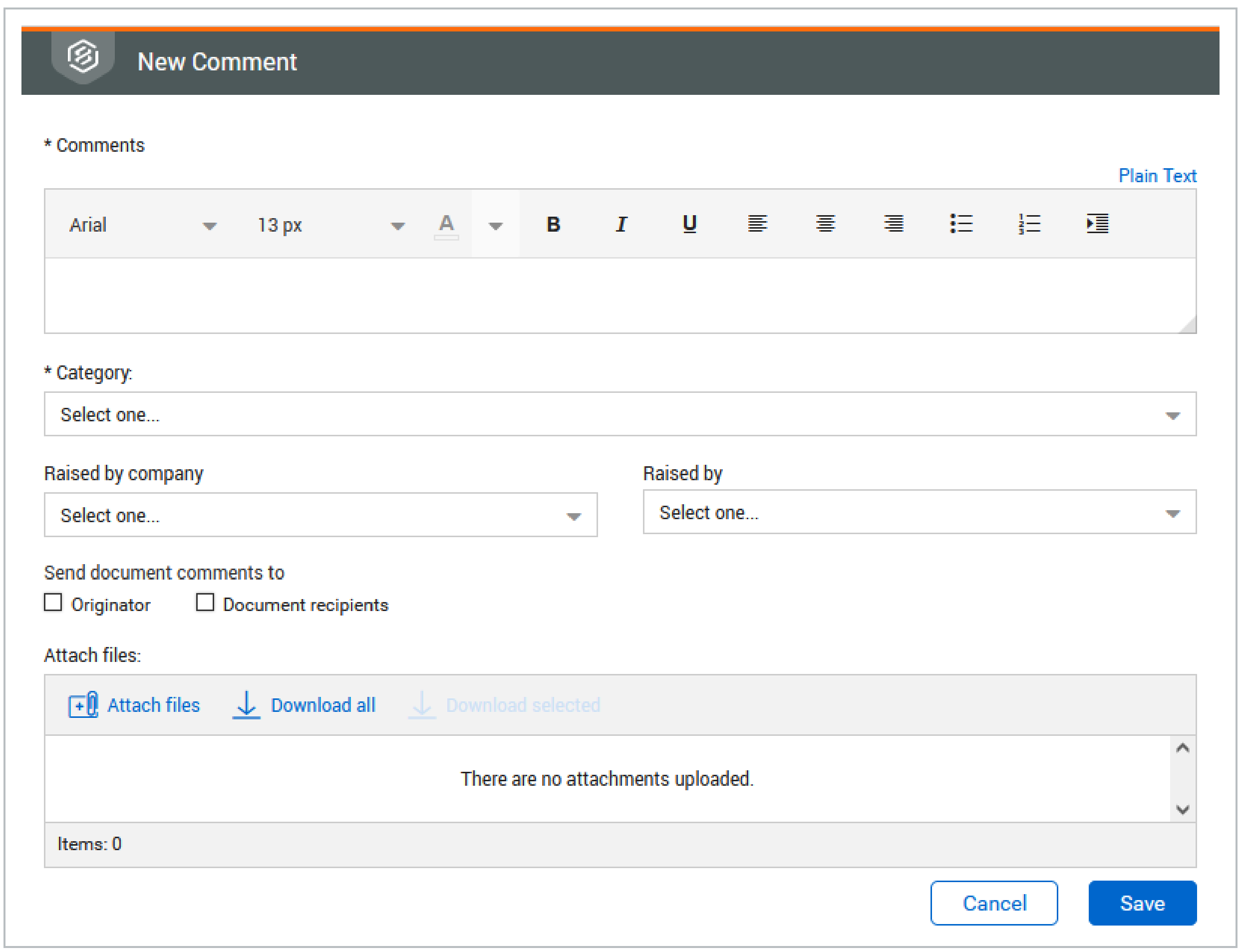


4. Click the **plus** icon to add a new comment. or click



- You can also duplicate a comment by selecting a comment and clicking the **Duplicate** icon.

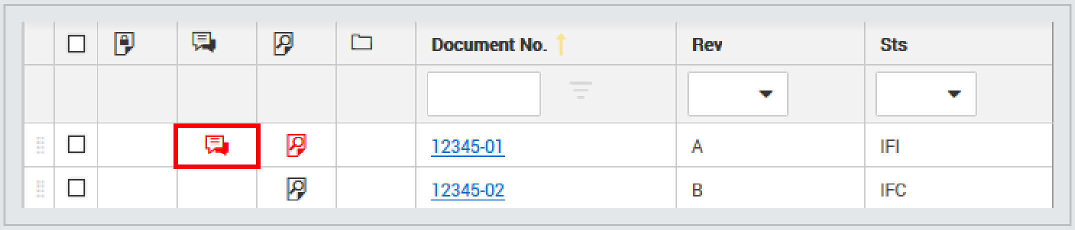
5. At the **Add Comment** window type the comment.



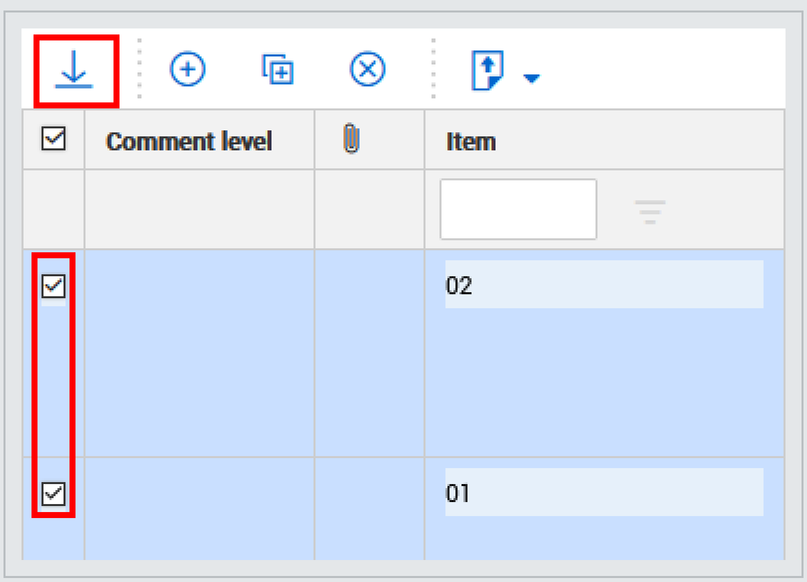
6. Select a **Category** for the comment and **Raised by** if the comment is being made on behalf of someone else.
7. Click **Attach Files** if there is a requirement to attach an external file, locate the file to upload, and click **Open**.
8. Click **Save** then **Close**.
9. Click **Close** to close the Viewer/Comments window or use the **X** in the top right hand corner of the screen.

NOTE

- Making comments by this method is not in place for making comments as part of the document review process. Completing the review is still managed in the document review process.
- Documents in the document register that have existing comments against them are displayed with a comment icon to the left of them.

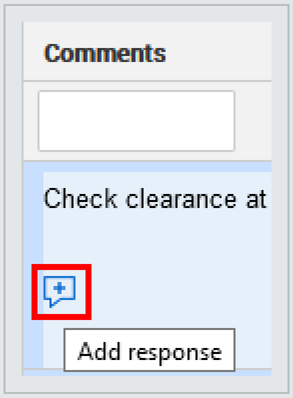


- Comments can be emailed automatically by ticking the relevant boxes to send your comments to any or all of the following:
  - The Document Originator
  - The Review Coordinator
  - Document recipients
- To apply the same comments against multiple documents you have access to, select the documents in the Document Register, click **Actions** then **Comment** and add the comments. The comments will be applied to all the selected documents.
- To download the attachments related to one or more comments in the comments register, select the comments and click the **download** icon.

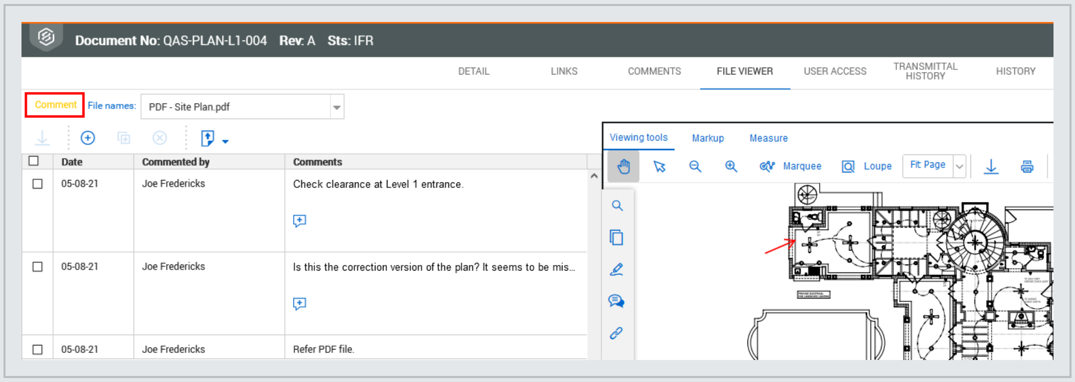


NOTE

- To respond to other users comments use the **Add Response** link in the Comments column. Your response will be added as a new comment indented beneath the comment you responded to.



- Though a review has been completed a notification may be sent that another reviewer has commented. If a response is required this can still be added from the document register (even though the document is still under review). Comments adding in this way are still considered review comments and accessible only to other reviewers and the review coordinator.
- Comments can be added from within File Viewer.. An image of the document and the comments text box can be seen together. From the File Viewer, click the **Comment** button..



- Typically comments can only be **closed out** by: the originator of the comment; the Review Coordinator; or the Project Administrator.
- Use the “Raised by” option in text comments to indicate if the comment was raised by another person. Both the Originator and Raised by person have the same access privileges to the comment.

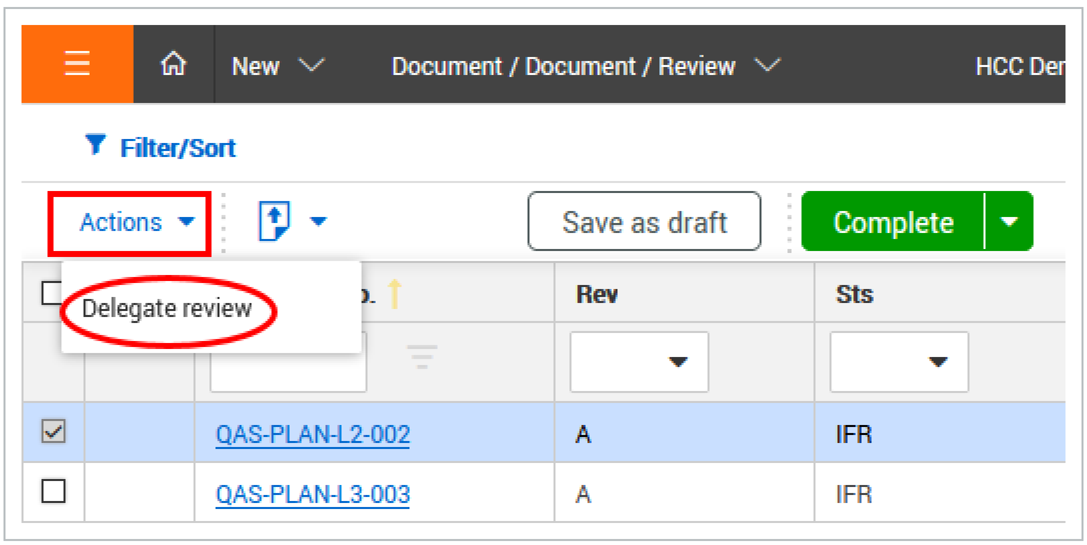
NOTE

- Both outstanding text and redline comments that are not closed out can be carried forward to the next revision of the document. Contact InEight to have this feature activated.

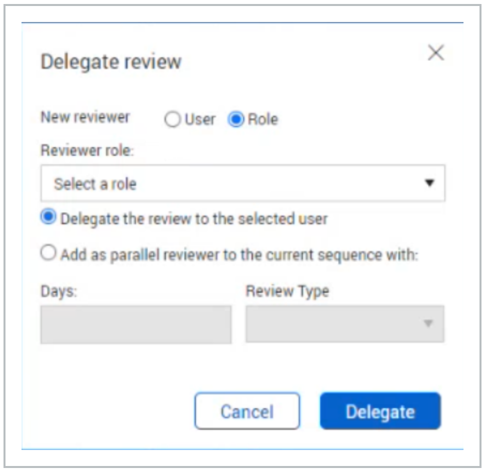
1.8 DELEGATE REVIEW

Project members may need additional input or allocate the review to someone else. This feature gives the option to delegate to another reviewer in parallel, or as a replacement for, the current reviewer.

1. Select one or more Documents from the Review Screen.
2. Click Actions, and then select **Delegate Review**. This feature is only available from the **Review screen**.



3. Select the **User** or **Role** in the New Reviewer field, and then select the applicable company and user or the role.



4. Select either **Delegate the review to the selected user** or **Add as parallel reviewer to the current sequence within _ days** and then select the **Review Type** from the drop-down menu as **Mandatory** or **Optional**. If the Review/Release configuration does not allow days to be added to the review, you cannot edit the Days field.
5. Select **Delegate**.

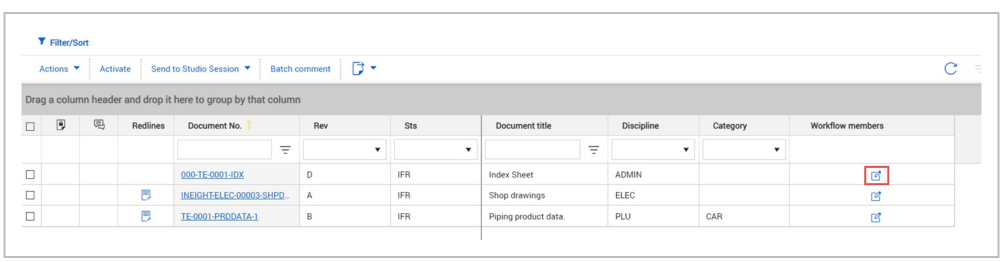
1.9 MANAGE REVIEW COORDINATORS

A project administrator or the review initiator can update the review coordinator for a document individually or in bulk.

UPDATE THE REVIEW COORDINATOR FOR A SINGLE DOCUMENT

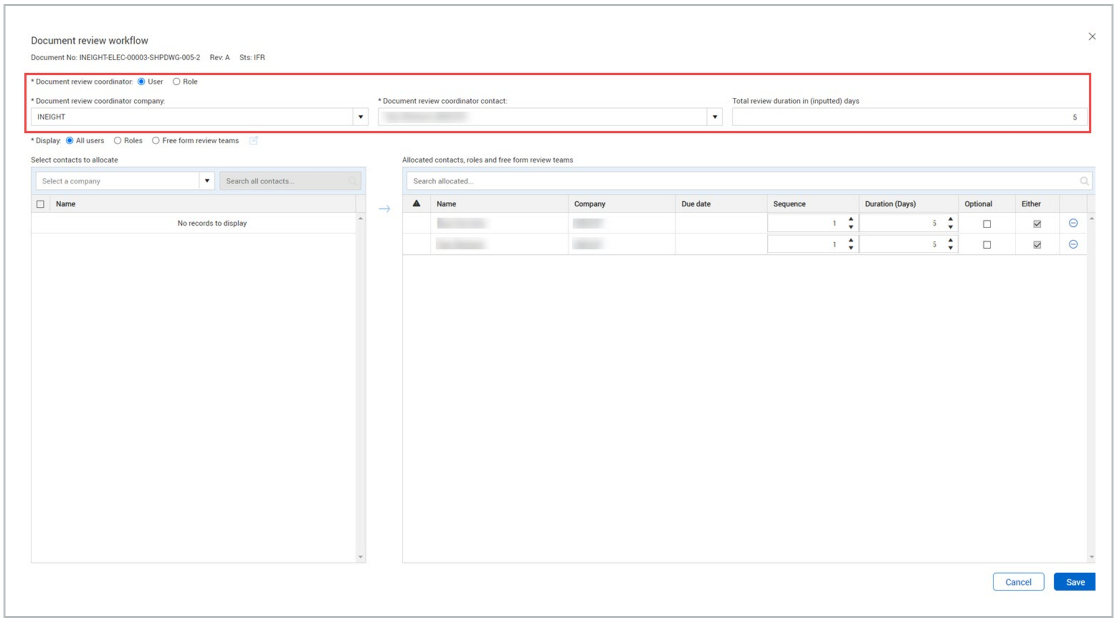
Project administrators and the review initiator can edit the workflow members when you want to update the review coordinator for a single document.

1. From the Document workflow page (Documents > **Manage workflow**), click the **Add/Edit workflow member** icon for a document.



The Document review workflow dialog box opens.

2. Use the Document review coordinator radio buttons and drop-down lists to select a user or role.

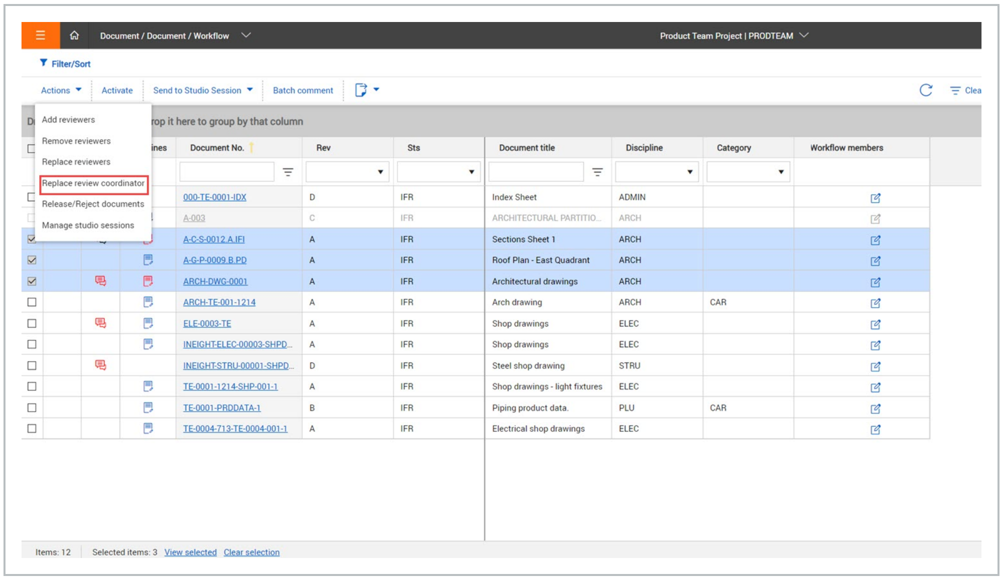


3. Enter the review coordinator company and contact, and then click **Save**.

UPDATE THE REVIEW COORDINATOR FOR MULTIPLE DOCUMENTS

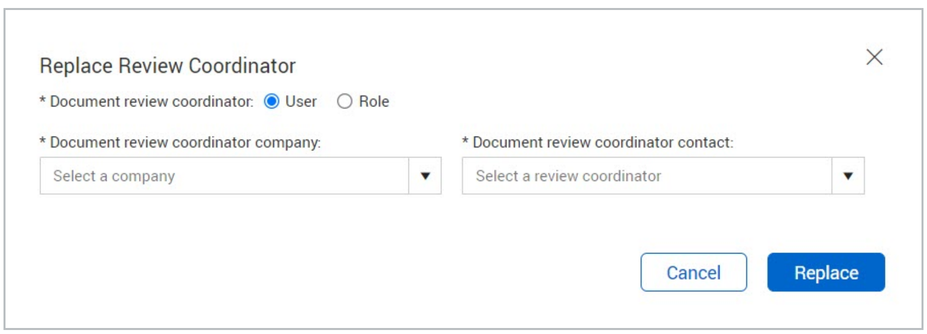
Use these steps when you want to update multiple documents with the same review coordinator.

1. From the Document workflow page (Documents > **Manage workflow**), select one or more documents, and then expand the **Actions** menu and select **Replace review coordinator**.



The Replace Review Coordinator dialog box opens.

2. Use the Document review coordinator radio buttons and drop-down lists to select a user or role.



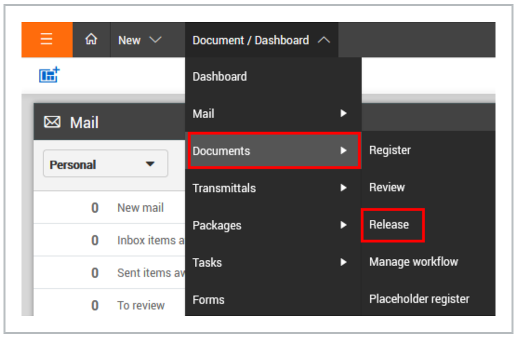
3. Enter the review coordinator company and contact, and then click **Replace**.

1.10 DOCUMENT REVIEW APPROVAL/RELEASE

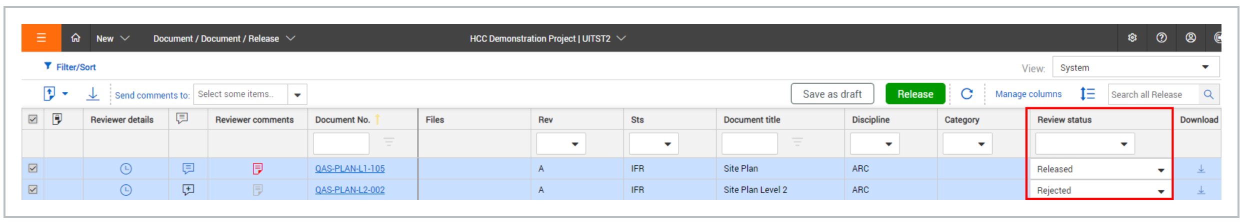
After all reviewers have completed their reviews of a restrained document in a workflow, the Review Coordinator receives an email notification. The Review Coordinator uses the **Document Release** screen to conduct their own review, select comments to include, and apply a review status, which will either releases or rejects the document.

Using the Document Release screen:

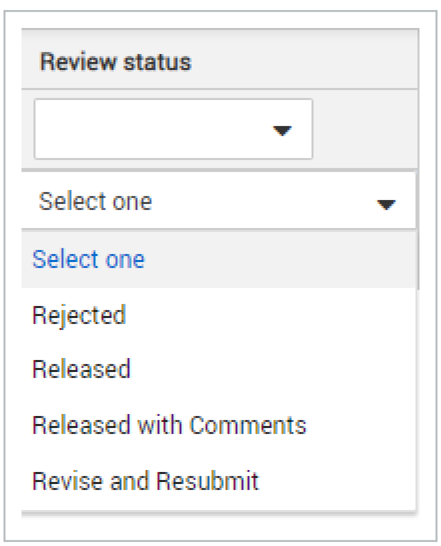
1. From the **Module Menu**, hover over **Documents** and select **Release**.



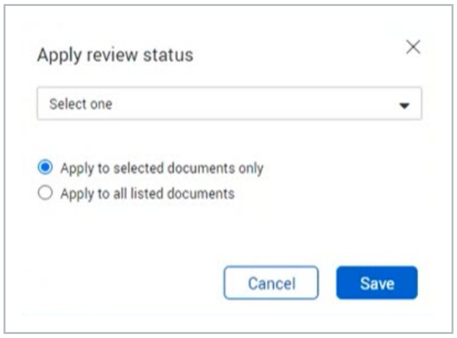
2. The Documents awaiting release screen defaults to displaying **All documents awaiting release** by the logged in Review Coordinator.



3. If there are many documents awaiting release, use the Search box or Advanced Document Search options to locate the required documents.
4. Allocate **a Review Status Code** as applicable to each document.
   - For a single document, select the document, and then select a status from the Review status drop-down list.

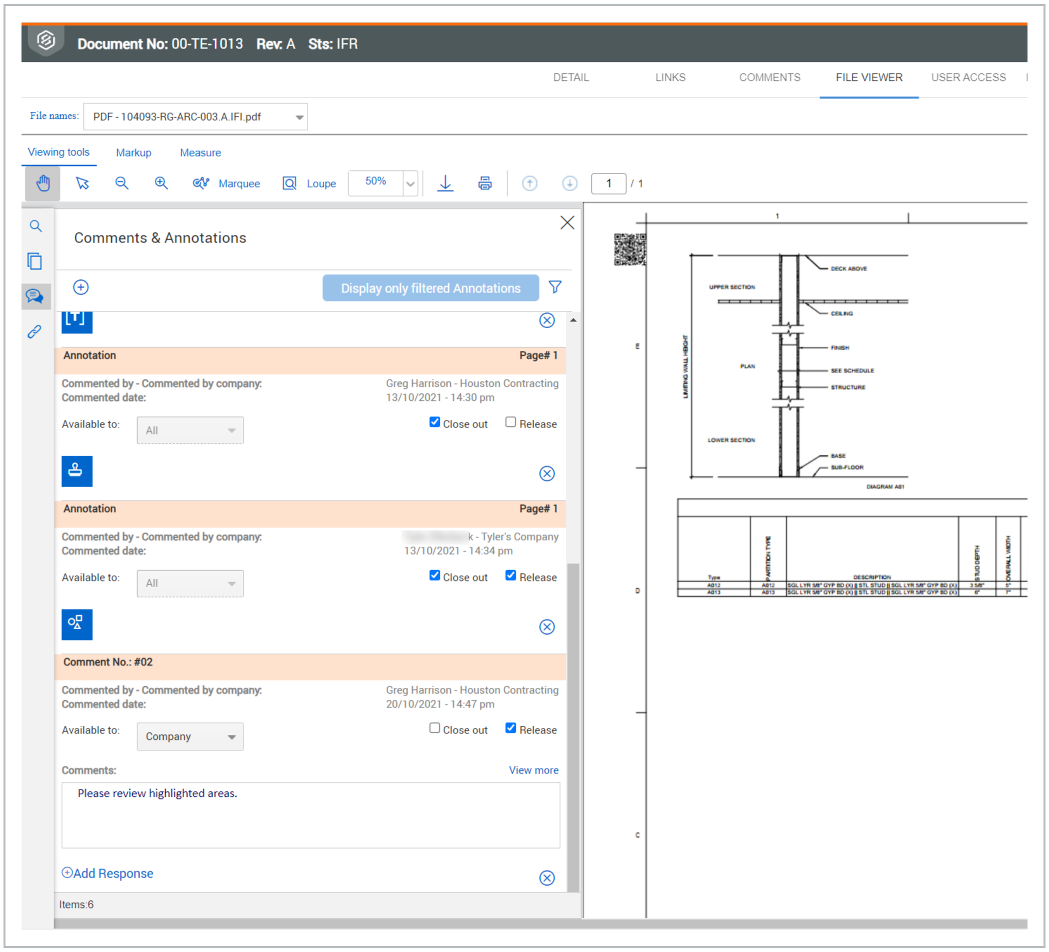


- For multiple documents, select the documents, and then click Actions > **Apply review status**. The Apply review status dialog box opens, and then you can select the status. You can apply the status to the selected documents only or to all documents in the view.



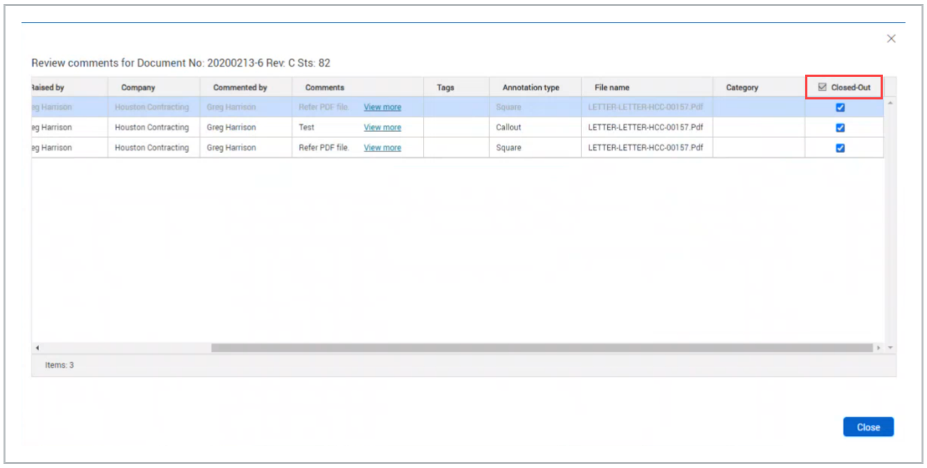
Click **Save** to apply the status.

5. The review options for the Review Coordinator are the same as those of the Reviewers in the Document Review Wizard which are:
   - Download
   - Redlines
   - Text comments
   - Attach external files to their comments.
6. The Review Coordinator is able to view outstanding Reviewer comments and close them out as required:
   a. Click the Redline  icon to open the File Viewer to view markups and comments made against the file. Click the **Comments** tab to see a full list of comments.



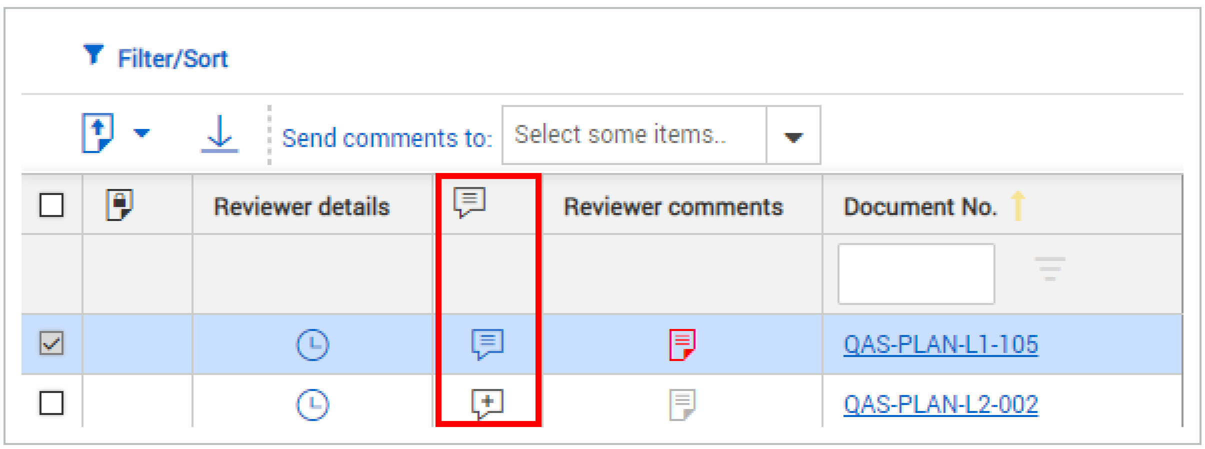
b. View reviewer comments and annotations. Select the **Close out** check box for each to close them out. Select the **Release** check box if you are ready to release the comment. The Review comments page is updated.

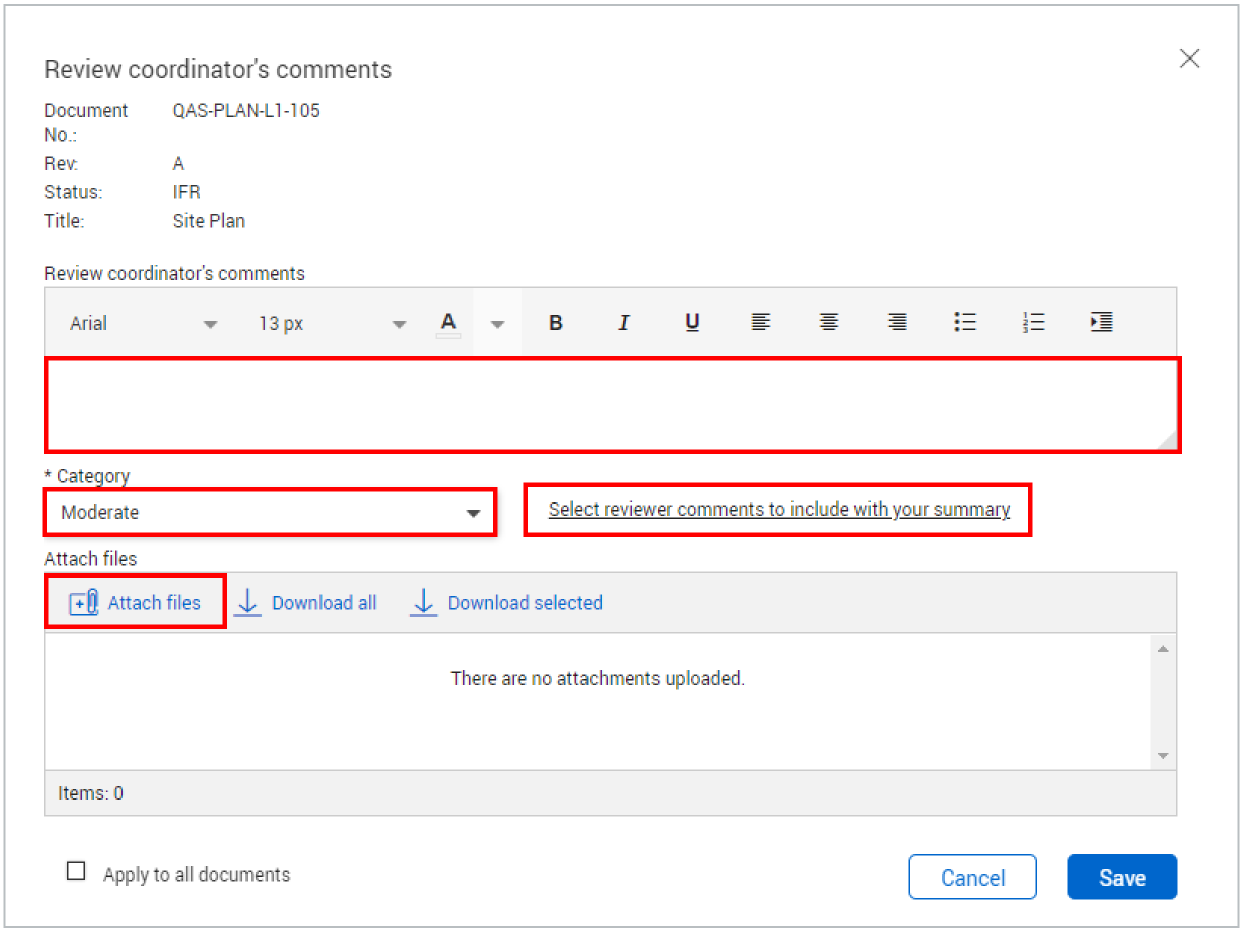
Alternatively, if you want to close out comments in bulk, you can click the **Closed-Out** check box in the Closed Out column header in the Review comments dialog box.



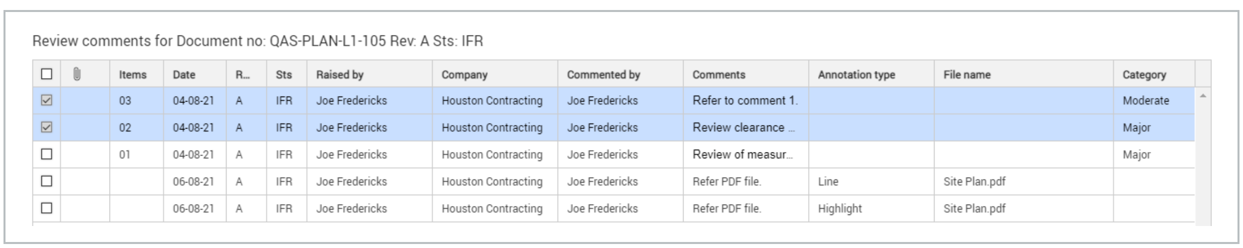
7. The Review Coordinator is also responsible for selecting any comments and/or redline mark-ups made by individual reviewers to be included in the “final comments” for the document. These are distributed back to the originator and/or to the review members.

8. Click the **Add Text** icon in the Comments column and enter reviewer comments as the review coordinator.





9. To include comments and/or redline mark-ups made by other reviewers, click the link **Select Reviewer comments to include with your summary**. Select the comments to include by ticking the boxes against them. To view any attachments, click the paper clip icon and **Download** when prompted.

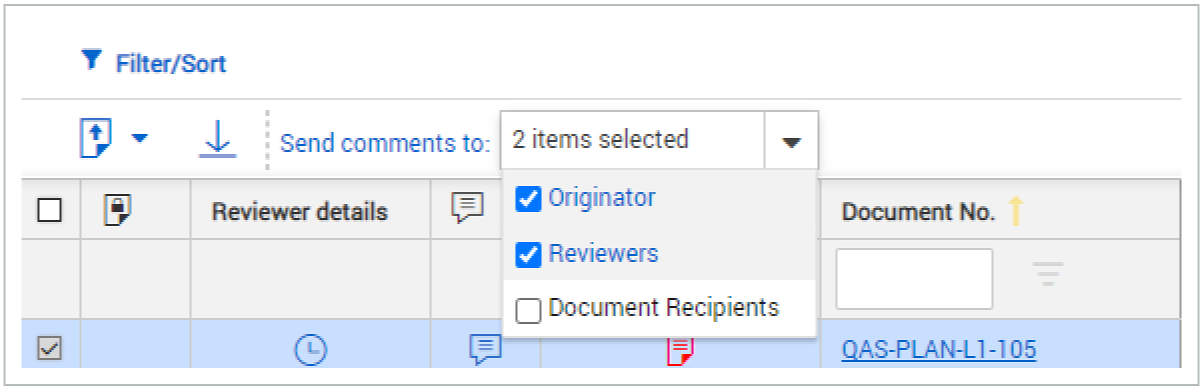


Review comments for Document no: QAS-PLAN-L1-105 Rev: A Sts: IFR

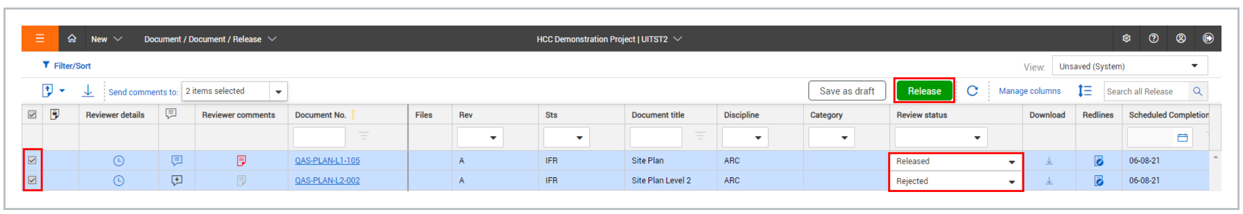
☐		Items	Date	R...	Sts	Raised by	Company	Commented by	Comments	Annotation type	File name	Category
☑		03	04-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Refer to comment 1.			Moderate
☑		02	04-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Review clearance ...			Major
☐		01	04-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Review of measur...			Major
☐			06-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Refer PDF file.	Line	Site Plan.pdf	
☐			06-08-21	A	IFR	Joe Fredericks	Houston Contracting	Joe Fredericks	Refer PDF file.	Highlight	Site Plan.pdf	

10. Click **Close** when completed to return to the Review Coordinators comments window.
11. Use the **Attach files** button to select one or more external files to include as part of your Review Coordinators comments.
12. Select a **Category** if required.

13. Click **OK** to close the Review Coordinator's comments window.
14. From the Release screen, select who the review comments should be sent to: Originator, Reviewers or Document Recipients.



15. To release the documents where the above steps have been completed ([ensure a release status has been set]()), click **Release.**.



Reviewers and review coordinators can download the original file with all markups prior to consolidation after the document is released.

NOTE

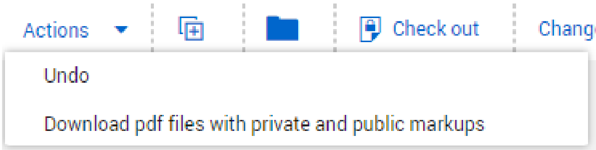
- **If the document is released:** The document is distributed automatically using email notifications.
- **If the document is rejected:** only the Originator, Review Team and Admins retain access to the document. Users from the originating company will not receive access even if they are part of the Distribution Rules / Discipline Matrix.
- The Document Register is updated with the Review Status applied.
- With the option enabled, at the Release screen the review coordinator can attach an additional View file to the document. To add an additional view file, click **Add Files** and select a view file to be added to the document.
- Use the **Review Details** link to review a history of who reviewed the document and when.
- Comments and/or Redline layers applied directly by the Review Coordinator and other reviewers selected by the Review Coordinator as part of the release process become public comments. These are visible after the document has been released via the Document Register. The other comments are private, and are not visible to users.
- The review coordinator can change private comments to public after the document has been released. See 1.10 Step by Step 2 — Change private comments to public on page 43.
- InEight Document can be configured to automatically stamp an approval signature, date and status into an image of the document (normally a Tiff file) so that the approved document when printed always contains this information. (Contact InEight for information on QPRINT if this is of interest. Charges apply).
- A reviewed and released document can be resubmitted for review without changing the Status or Revision. Go to **More**, then **Resubmit for Review** in the Document Register.

1.10 STEP BY STEP 1 – DOWNLOAD PRIOR TO CONSOLIDATION

Some projects require the ability to download or export each document that contains all review comments and markups made during the review workflow but prior to the consolidation of the markups and comments and subsequent release of the document.

This option is available in the PDF viewer only and is only supported with Adobe.

1. From the PDF viewer, expand the **Actions** menu, and then select **Download pdf files with private and public markups**.



The PDF files are provided in a zip file.

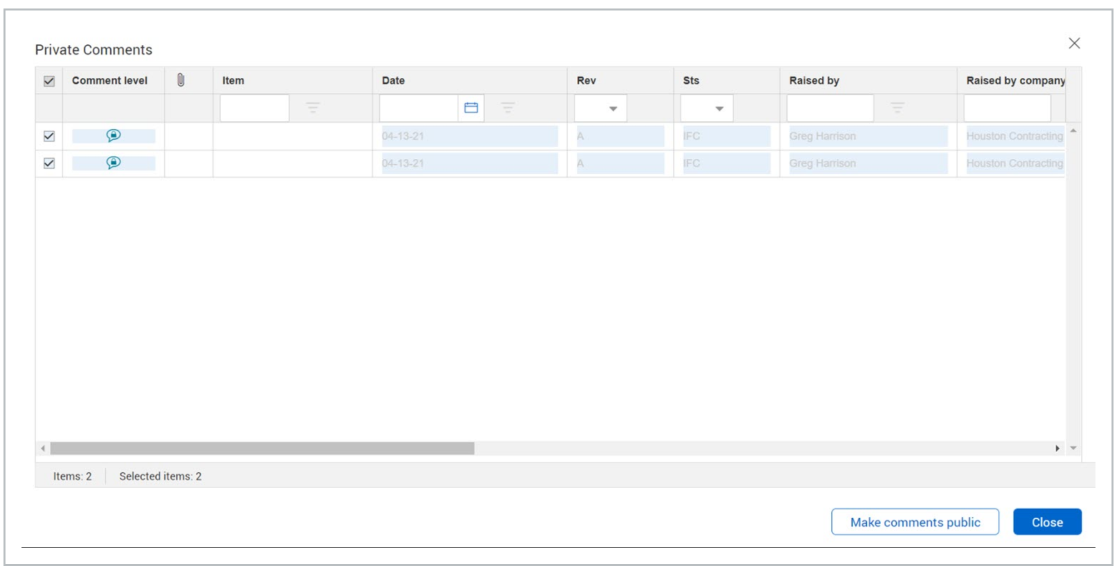
2. Extract the zip file.
3. Open thePDF file.

1.10 STEP BY STEP 2 – CHANGE PRIVATE COMMENTS TO PUBLIC

If you mistakenly chose to not publish a comment, you can now mark the private comments as public.

Only review coordinators and administrators can change private comments to public.

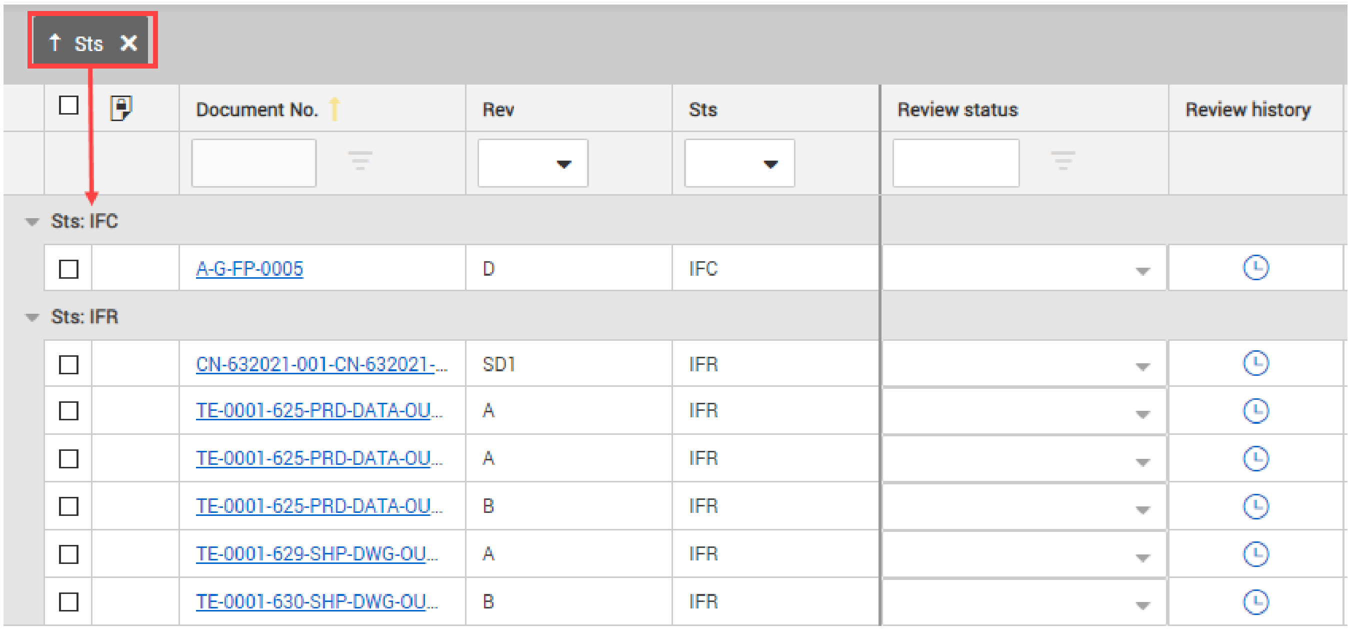
1. From the Comments tab, expand the Actions menu, and then click **View private comments** to see a list of all comments that have not been published.
2. Select the comments you want to make public, and then click **Make comments public**.



1.10.1 Group items in the Document release register

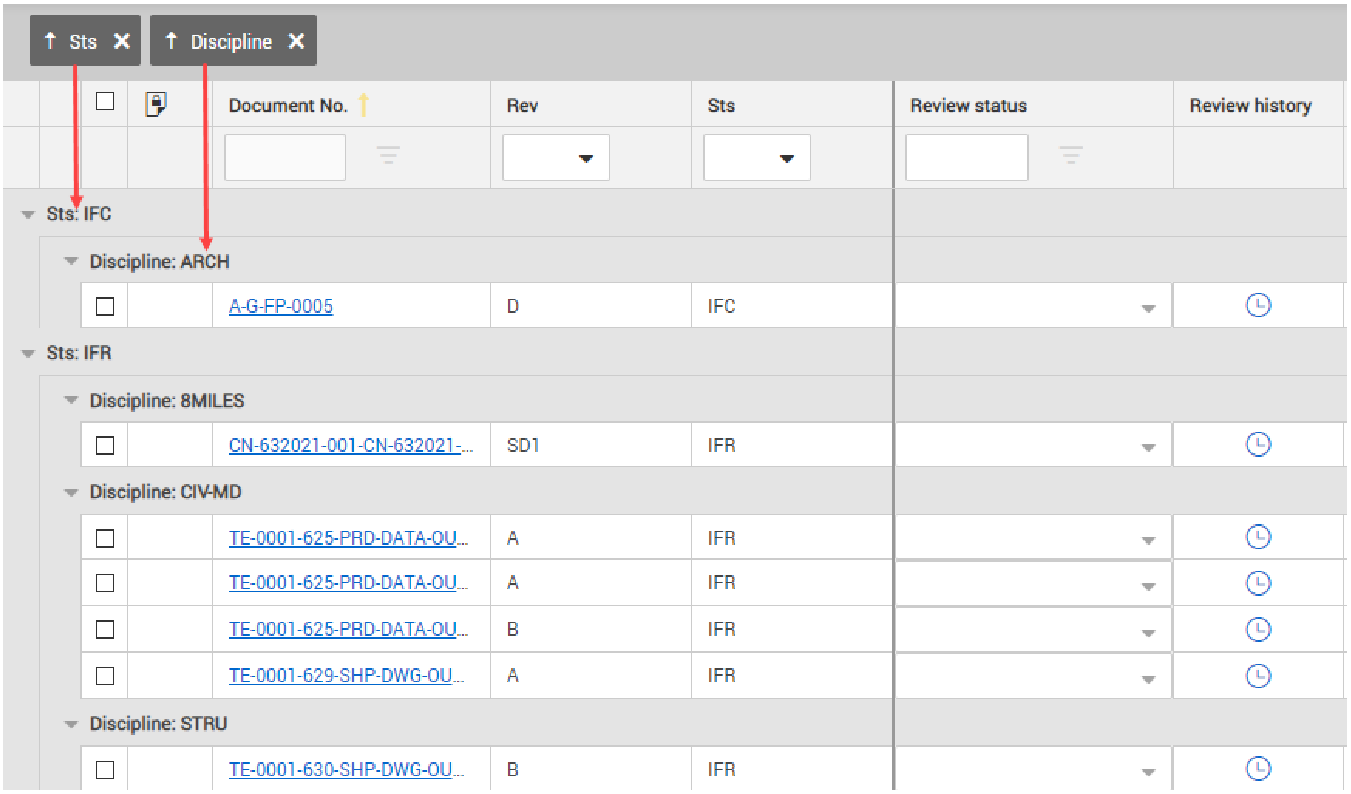
You can group entries in the Document release register by available register columns to help you quickly locate documents.

The grouping tool, which is shown as a gray bar above the column headings, lets you drag and drop a column heading to group by that column. For example, if you drag the Sts column to the bar, the documents are grouped by status. In the image below, the documents are grouped by status in ascending order. The documents with no status would come first, followed those with IFC status and then those with IFR status.



You can click the arrow next to the column name in the tool to change the order from ascending to descending. You can expand and collapse the groupings, so you can find the document you are looking for quickly.

To use multiple groups, you can drag multiple column headings to the grouping tool. The documents are grouped in the order the headings are placed in the tool. For example, if you were to add the Discipline column to the scenario above, the documents would be grouped by status and then discipline within the status.



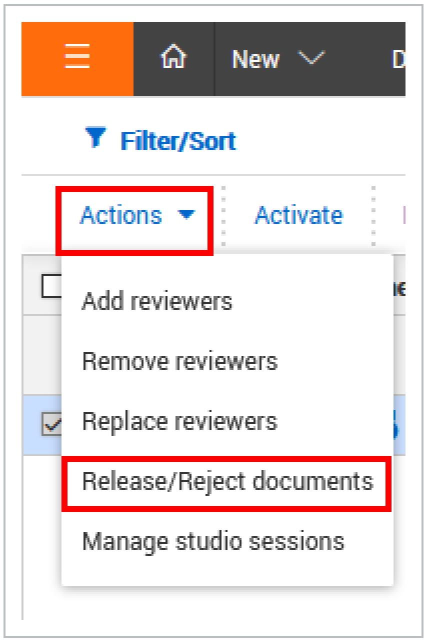
1.11 DOCUMENT RELEASE WITHOUT ACTIVATING A WORKFLOW

An option can be enabled to allow the Review Initiator assigned to a workflow to Release OR Reject a document without activating a full review workflow.

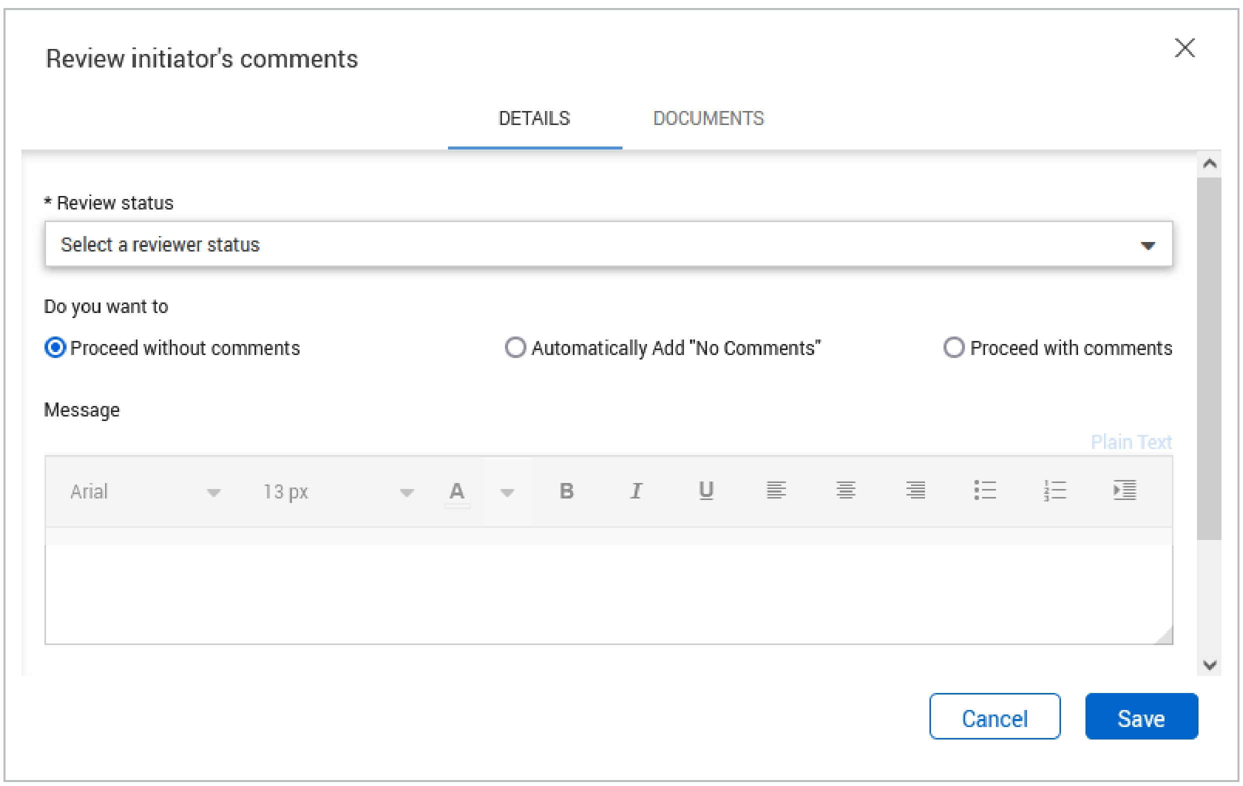
This is useful where the Review Initiator assesses the submitted document and finds that it requires it to be re-submitted. In this situation they can immediately reject the document rather than having to put it through a full workflow first.

To release/reject a document prior to it being activated for a workflow:

1. From the **Module Menu**, hover over **Documents** and select **Manage workflow**.
2. Select the Document(s) to be Released/Rejected without activating a workflow.
3. From **Actions** select **Release / Reject Documents**.



4. At the **Review Initiator Comments** window select a **Review Status** and enter a message (or select Proceed without comments).



5. Click **Save**.

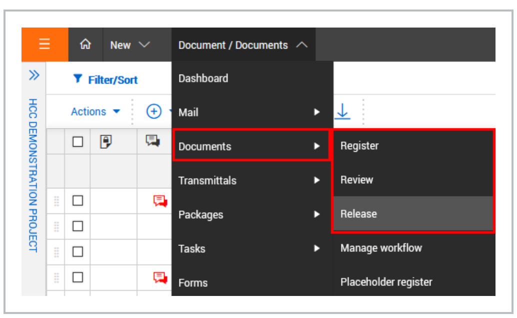
NOTE

- The Release / Reject Documents option only appears if this option is enabled at a project level.
- After being released or rejected by the Review Initiator, the documents are considered to have completed the workflow cycle and the documents will be displayed with the assigned review status in the Document Register.
- If a document is “Released” by the Review Initiator a release notification is sent to all users who have access to the document.
- If a document is “Rejected” by the Review Initiator, only the originator of the document will receive a notification.
- To view a list of documents that have been Released / Rejected by the Review Initiator use the Advanced search option and filter for Released/Rejected by equal to Review Initiator.
- The Notes column on review workflow reports shows an indicator if the document was released/rejected by the Review Initiator

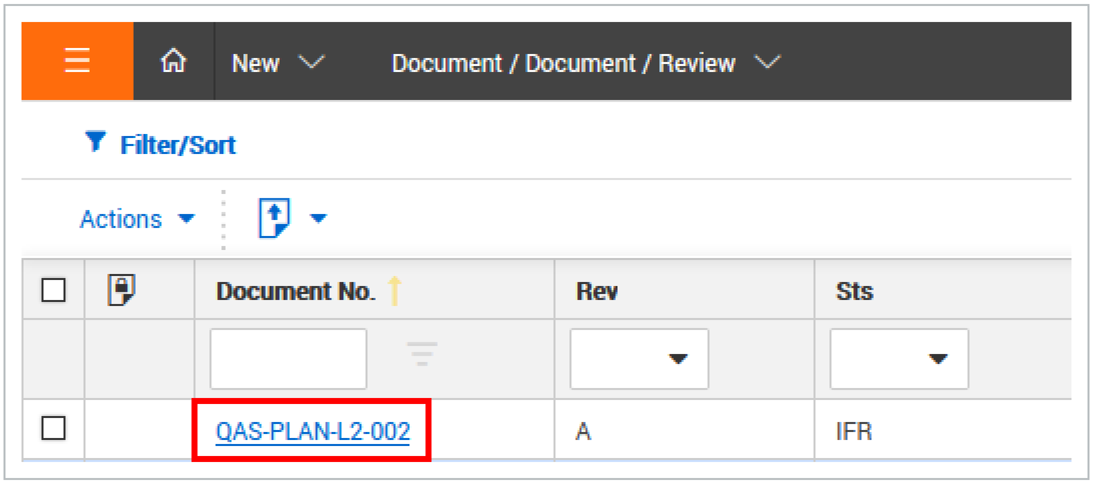
1.12 VIEW REVIEW STATUS

To view the status of a document that in a workflow process:

1. Open the**Document or Review Register.** .



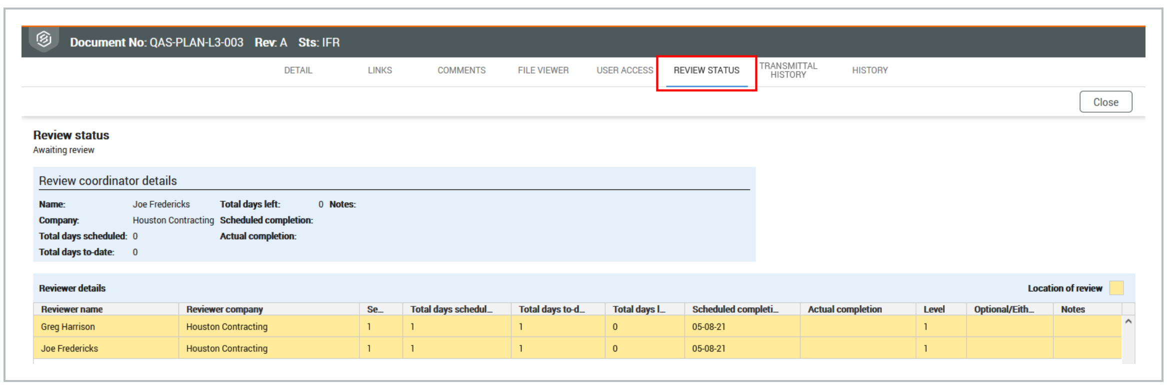
2. Click on the Document Number link to open the details screen.



3. Select the **Review Status** Tab.

   The review status tab will show:

   - The type of review that is in progress (Serial, Parallel or Single)
   - The person currently responsible for the review and their scheduled completion date.



4. A list of reviewers for the document and for each reviewer:

   - **Sequence:** the sequence the reviewer reviewed the document.
   - **Total Days Scheduled:** scheduled days for the reviewer, not the total review period for the document.
   - **Total Days to Date:** either the actual days to date since the reviewer was notified to commence their review (for incomplete reviews), or the actual days taken for the review (for completed reviews).

- **Total Days Left:** for completed reviews = 0, and for reviews in progress is the scheduled completion date less the system date in days.
- **Scheduled Completion:** calculated based on the date the reviewer was notified to start their review plus the scheduled duration. This date is empty for reviewers who have not yet been notified about the review.
- **Actual Completion:** date of review completion.
- **Optional/Either:** if the review is classified as optional or either for the reviewer.

NOTE

- This option is restricted to the Document Originator, Review Coordinator, and the Primary and Additional Project Administrators.
- If enabled, a project setting will allow anyone on the project to view this information.