

Review Creation and Assignment Process

Cheat Sheet

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The entire process of creating and assigning and testing a review best goes through the following 7 stages:

Step One: Gather the requirements

Make sure you know what is needed to be in the review. Fields, Scores, mandatory fields, assignee

Step Two: Check the Review Stage Setup

Dashboard > Ribbon Menu > Admin > Reviews > Review Stage Setup > Edit only if absolutely necessary

Setup here will override any setup in the form. Any system related fields (non-custom field) is being setup here and added in the actual form also.

If we need to see something like Yes/No or Long Notes which are system fields, we have to specify them here.

Also, under review notes, it is better that we leave the questions blank except for the Long Notes Field. Anything entered here will override the label of the field in the form.

Step Three: Create the Form and activate it

Dashboard > Ribbon Menu > Admin > Blueprint > Form Library > Reviews > Edit

NOTE: Form Designer will be explained in details in a separate page. This is an overview just to get us going.

Here we have the following options:

Red Box: Name of Review and number of people the review form is assigned to

Green Box: Libraries you can choose fields from. For example custom fields, coding sheets, standard fields. The application is also able to access extended fields from entities that have not much to do with the review and therefore, they are read-only fields for instance request number, etc.

Pink Box: Is loaded with available fields based on selection in Green Box. These fields can be added to the field by drag and drop into the area in Black Box.

Black Box: Has the final look and feel of the form

Yellow Box: Appears when a field is selected. It has options to modify the field.

Brown Box: Actions available to the entire form.

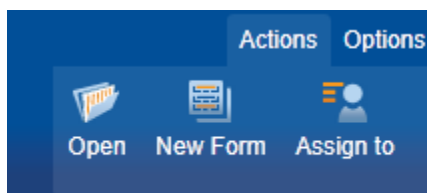
Step Four: Activate the form

Also, after creating and saving the review, from the ribbon menu (brown box), choose 'Activate'.

If there is another form for the same stage, make sure to go in and hit 'Deactivate' to get the new form show up.

Step Five: Assign the Form to Users

Dashboard > Ribbon Menu > Admin > Blueprint > Form Library > Reviews > Actions > Assign to



Clicking the Assign to brings the following screen up where we can choose who should this screen be assigned to.

It will un-assign the previous form from their environment and assign the new form to them.

Step Six: Create a Committee (Optional)

Dashboard > Ribbon Menu > Admin > Reviews > Manage Committees > Create new or modify an existing one

	Name, Title, Organization	Available?	Other Committees
1		<input checked="" type="checkbox"/>	TEST - Community Catalyst
2		<input checked="" type="checkbox"/>	TEST - Community Catalyst
3		<input checked="" type="checkbox"/>	TEST - Community Catalyst

It is not necessary, but best practice to create a committee and add reviewers that way. Here reviewers can be added or removed. It also indicates if there are other committees that the reviewer is part of.

Step Seven: Create Reviews

Search for Requests > Choose Requests > Actions > Assign Reviewers > Select Stage > Select Committee (or specific reviewers one by one) > Select Stage > Select Committee

This stage is self explanatory.

Step Eight: Check to make sure it looks good

Dashboard > Ribbon Menu > Launch > Reviewer Portal

It is a great idea to create some tests and login to Reviewer Portal to make sure it looks alright.

Step Nine: Clean up Test Reviews

Full Search > Reviews > Add Filter > Choose Stage and Reviewer > Search > Select All > Actions > Delete

Also important to cleanup the test reviews.