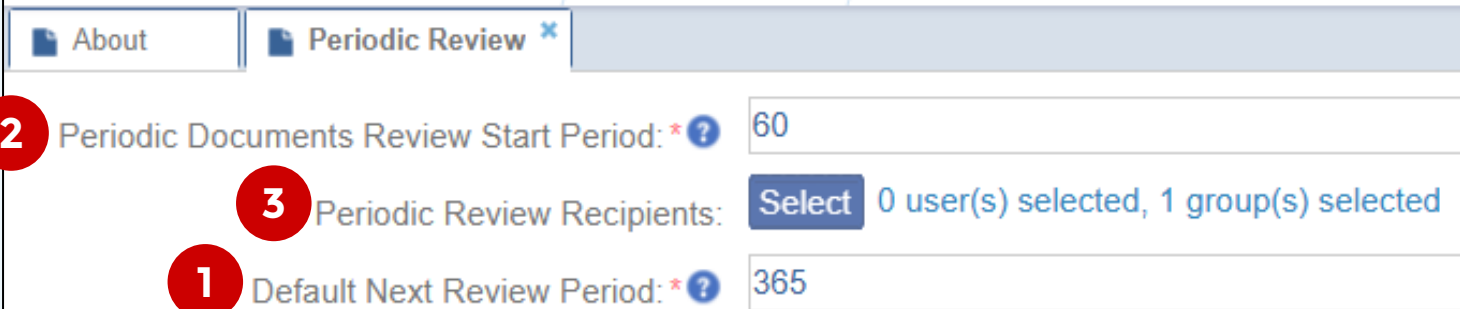


## APPLICABLE TO:

- Admin
- Manager
- Editor
- Reader
- Collaborate
- eISF

Documents in Collaborate rooms can be assigned a Periodic Review date. This represents a predefined amount of time after which an Effective document should be reviewed, and helps teams track what documents need to be updated. This Job Aid aims to provide information that is quickly accessible about this feature and related considerations.

## Part 1: Settings



The screenshot shows a web interface for 'Periodic Review' settings. It features three input fields with red numbered callouts: 1. 'Default Next Review Period: \* ?' with a value of 365. 2. 'Periodic Documents Review Start Period: \* ?' with a value of 60. 3. 'Periodic Review Recipients:' with a 'Select' button and text indicating '0 user(s) selected, 1 group(s) selected'.

**1** **Default Next Review Period** represents the interval between a document coming into effect (Effective Date) and the next review, expressed in calendar days. This value can be also set in the individual document profile, if room configuration allows.

**2** The **Periodic Documents Review Start Period** sets the moment, expressed in days before Next Review, when a document is available for review. This triggers two changes: notifications set in element #3, and changes to the interface, described in element #8 of this article.

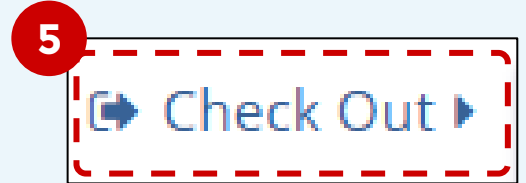
**3** **Periodic Review Recipients** can be used to set users or group of users that will be alerted, via notification, when a document becomes available for Periodic Review

**4** **An Example:** “Document 1” becomes effective on February 6<sup>th</sup>, 2026. The Default Next Review for the Document is set at 365 days, therefore the next Periodic Review is due February 6<sup>th</sup>, 2027.

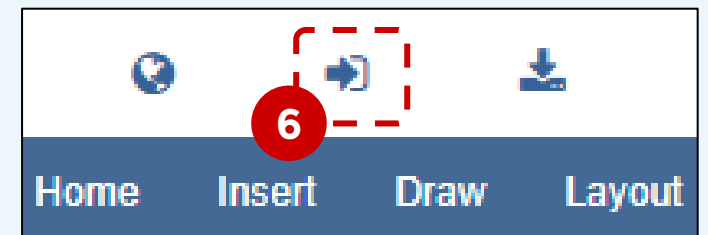
Because setting #2, ‘Review start Period’, is set to 60 days before that, a notification will be sent to any users/groups captured in setting #3 on the 8<sup>th</sup> of December, 2026.

## Part 2: Review Process

**5** To start a Review, a user will check the document out for editing, using any of the methods available to them.

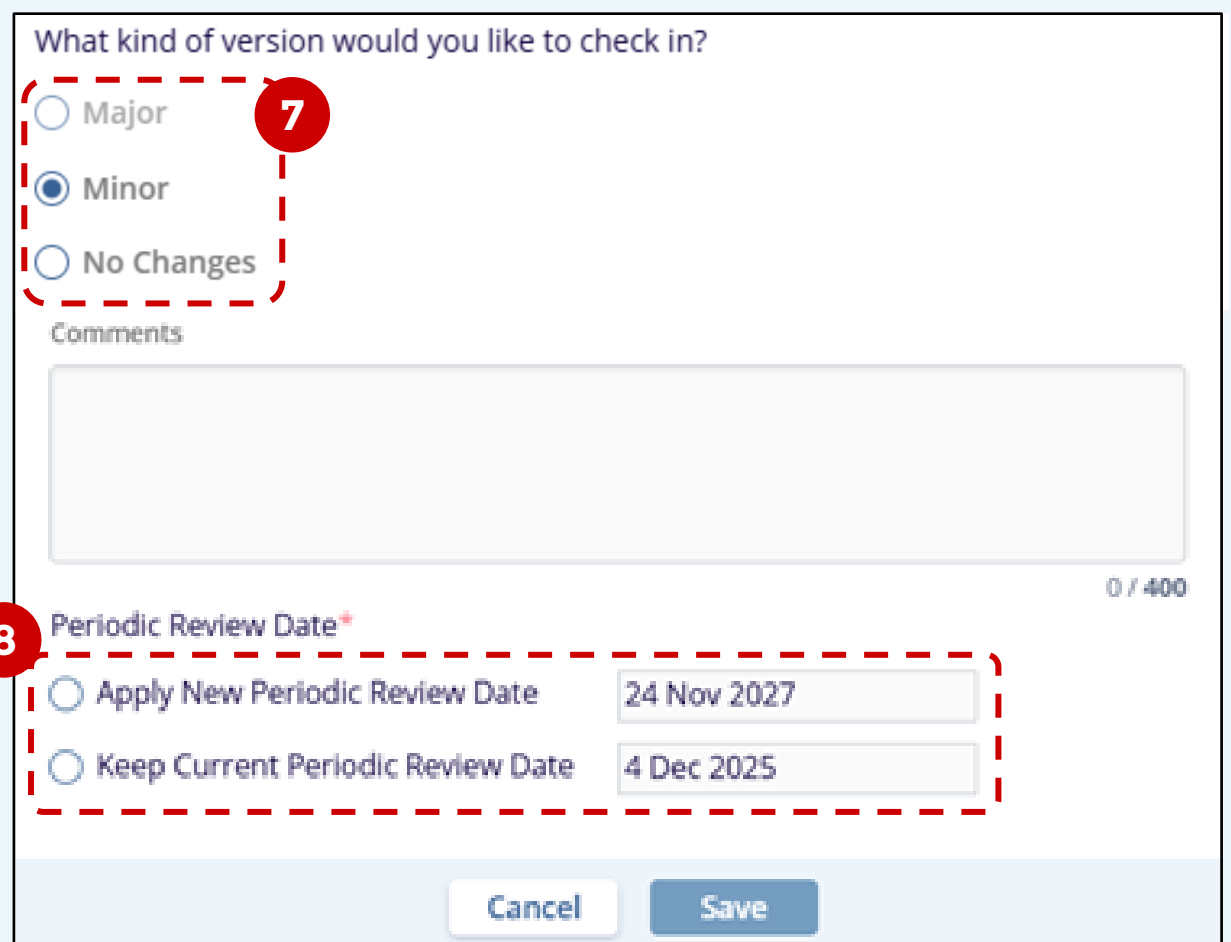


**6** The reviewing user or users makes any changes as per usual process, as needed, then one user starts the **Check In** process.



**7** User selects the type of change:

**Minor** sends the document to the workflow queue, where the new version can be validated;  
**No Changes** will keep the document in its pre-review state.



**8** When **No changes** is selected, a periodic review date can be manually selected. The system suggests the next date based on setting #1, plus the current review date (see #9).



This option will not appear if the document is checked out and in prior to the onset of the review time period set in #2.

**9** If the user chose **No Changes**, two scenarios are possible:

- **Apply New Periodic Review Date** if the review concluded that the document needs no change and will be reviewed again in the set amount of time
- **Keep Current Periodic Review Date** if the document was checked out in error, or the process was not meant to constitute a periodic review.