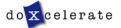
DELEGATE GUIDE -DIRECTIVES

Delegate





RevCom is used in several installations across the Department of Energy, each with its own nomenclature for the RevCom roles.

Author (Integrated Project Team, Author, Writer, OPI, PA)—Provides original and updated document versions for review. Responds to comments provided in RevCom

Approval Coordinator (AC)/formerly DPC -- Submits the official position of their organization through the review, edit and consolidation of local comments and data request responses. Assigns reviewers and Delegates.

Alternate – Serves as backup to the Approval Coordinator; submits the official position of the organization through the review, edit and consolidation of local comments and data request responses. Assigns reviewers and Delegates.

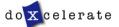
Delegate—Aids the AC in review, edit and consolidation of local comments. Recomments for inclusion in official submission.

Approving Official (AO) – Reviews comments to be submitted as representative of the organization's review. RevCom will automatically send a PDF copy of the comments via email as part of the Submit Package function. (Organizational option)

Subject Matter Expert (SME, Reviewer, Employee)—Reviews a document and enters applicable comments and/or explicit data request responses in RevCom.

Monitor-A read-only role; views "bird's eye" status of all system documents.





Delegate Tasks and Responsibilities

Responsibilities when Assigned to a Review

- Coordinate document review for the organization
- Assign reviewers
- · Set reviewers' deadlines
- · Assess comment submissions
- Submit a comment package showing suggested comments for inclusion in the organization's submission

Note: Delegates do not submit final packages

General Tasks (when not assigned to a review) Build a Team

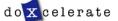
- Create SME accounts
- Create other Delegate accounts
- Create Groups

Coordinate

- Comment on the document
- Review, edit and consolidate submitted comments
- · Select comments for inclusion

Submit Package for AC review





Delegates

Delegates are users who are trusted to coordinate review on behalf of the AC. Some may have specific areas of expertise that can be applied for review of directive/policy/standard content.

NOTE: A Delegate cannot participate in review of a specific document until he/she has been assigned.

Delegates can perform all coordinator activities up until submission of the final package of comments.

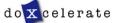
Delegates must be assigned to review specific documents. Upon being assigned, a Delegate can

- Set Due Dates
- Assign SMEs
- · Create user accounts
- · Review an assigned document and submit comments
- Review and Save for Inclusion SMEs' and Reporting Organizations' comments

Delegates cannot

· Submit the final package

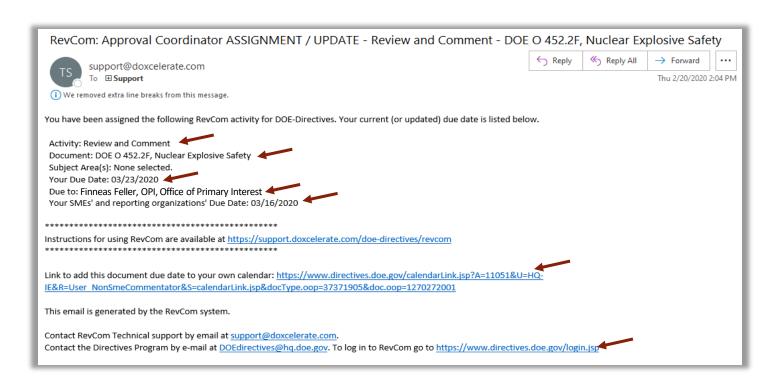




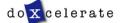
You will receive email notification from RevCom that a document is available for review. Information will include

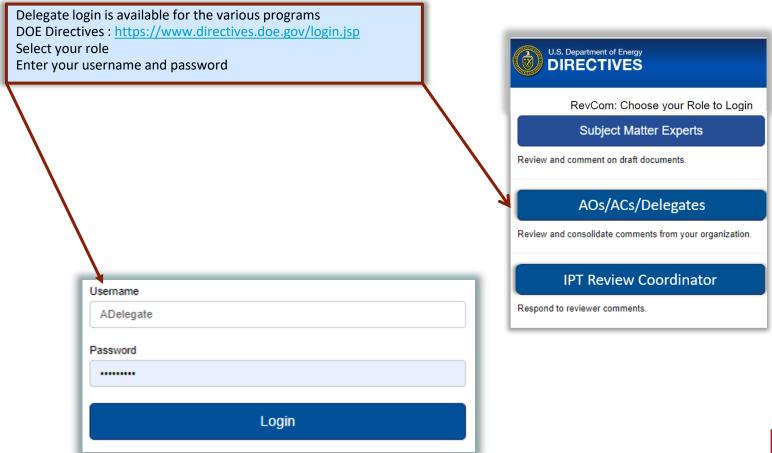
- · The activity
- · Document number and title
- Your deadline
- Due dates for your SMEs and reporting organizations
- A link to add the Due Date to your calendar
- A link to RevCom login

NOTE: The Document List is blank until the AC assigns the Delegate to a document

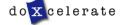


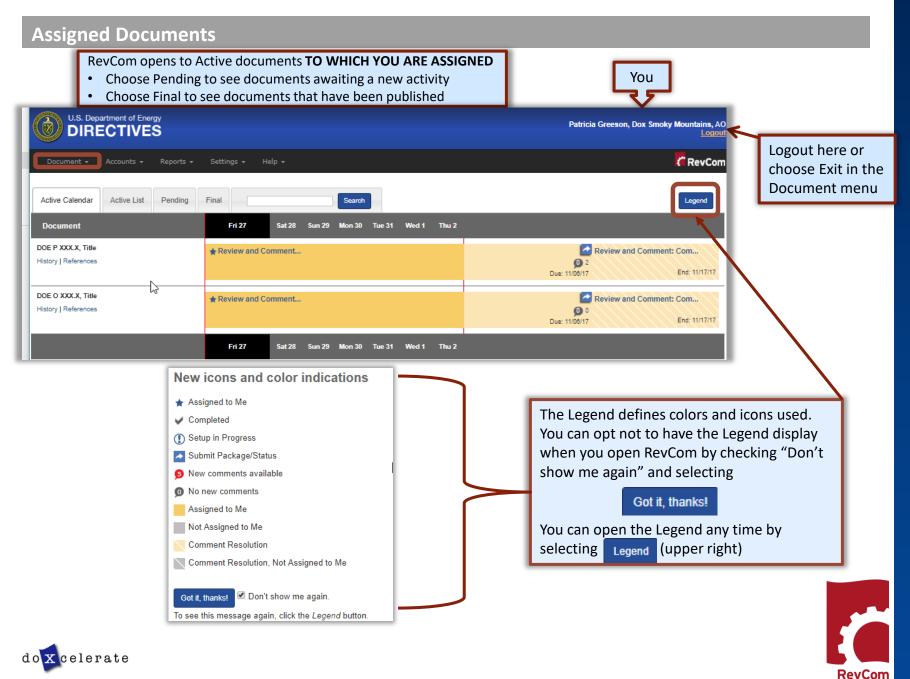








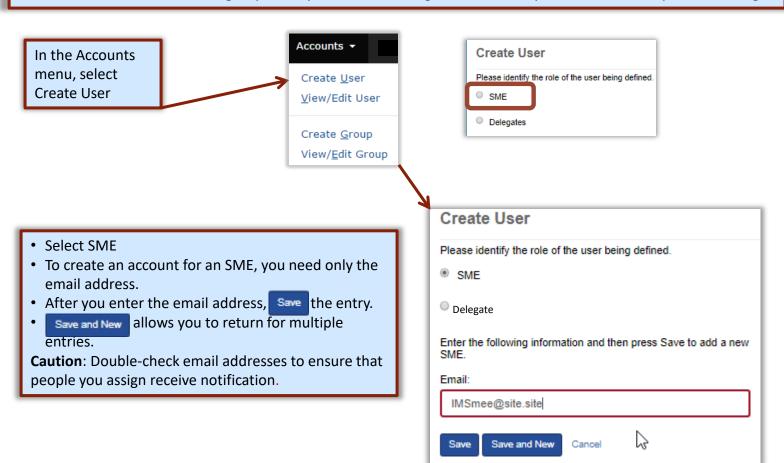




Create User Accounts—SMEs

- The people you list here will be ones from which you select assignees for each document.
- Once you have created users, you can create groups with special areas of interest.
- The View/Edit functions allow you to update user information and revise group membership.

Note: You can create users and groups at any time, even during a review when you discover a new person to assign.







Create Delegate Accounts

The Delegate is a person assigned to perform all AC tasks for a specific document, except for submitting the final package. He/she can create accounts, assign users, set deadlines, etc., for a specific document review but only after you have assigned him/her as Delegate.



NOTE:

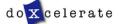
ACs/Delegates set their own passwords using an automated system. You will receive email that provides username and a URL connection for setting a password.

SUGGESTION:

Because people forget their usernames, it is good to choose a consistent format for Delegate usernames [first initial + last name (AFellow); last name only (Fellow); all caps (ALADY; LADY)].

Plea	ase identify the role of the user being defined.
• [Delegate
0	SME
Ente	er the following information and then press Save to add a new delegate
Rev	Com Username:
D	Delegate
Full	Name:
D	anny Delegate
Ema	ail:
da	anny.delegate@site.site
Сор	y-to Emails: (not required)
	ernal Title:
D	elegate





Automated Password

New Delegates will receive email that includes username and a link to setting the password.

The login box includes a mechanism to use if you have forgotten your password.

AC/Delegate Login Username Username Password Login Forgot Your Password? | RevCom Home

PASSWORD RULES:

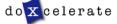
- Passwords cannot be reused
- Minimum length is 8 characters
- Must include at least one of each of the following:
 - Uppercase letter
 - o Lowercase letter
 - o Number
 - Special character (only \$ or #)
- The \$ or # cannot be in the last position

UNSUCCESSFUL PASSWORD CHANGE:

Errors include:

- Reuse of an old password
- Failure to retype the new password correctly
- A special character in the last position
- Too few letters
- Missing required elements (uppercase/lowercase letter, number, # or \$)
- Entering the wrong special character

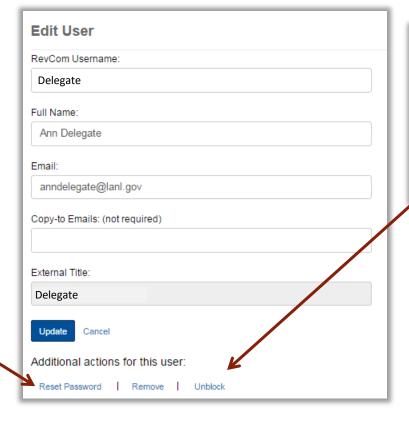




Blocked ACs/Delegates

Users are blocked when they

- Fail to login successfully three times
- Remain inactive for an extended period
- Do not respond to email inviting them to reset a password



The AC is responsible for unblocking the Delegate's access.

In the Accounts menu, select View/Edit User

 Select the Delegate's account and choose Unblock





To complete the

process, return to the Delegate's page and

select Reset Password

Create Groups

Your Accounts listing will be similar to the one below

View User

Click a user name to make updates.

ACs/Delegates

- · Ann Delegate
- Chris Tirado
- Muriel Johnson
- Patricia Greeson
- RevCom Support DPC
- Arthur Delegate
- One Delegate
- Ruby Redd
- · A Sample Delegate
- The Delegate
- Test Account 1

SMEs

- diane@juju.com
- diane@site.site
- jack@doxcelerate.com
- jmcdonald@doxcelerate.com
- jmsfnm@gmail.com
- mickeyd@doxcelerate.com
- minnie@ju.com
- mudijo1211@gmail.com
- patricia@doxcelerate.com
- topdog@site.site
- Workerbee@site.site

Create New User

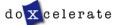
In the Accounts menu, select Create Group



You can at any time

- Add or remove Delegates and/or SMEs
- · Create new groups
- Have an SME or Delegate serve on several groups
- Delete accounts for personnel who have transferred or retired





Create Groups – Subject Areas

To create a group, assign a Group Name and click the box next to the SMEs/Delegates.

A list of Subjects common to directives is available. You can add one or more Subjects to a Group name or can create Groups by Subject name.

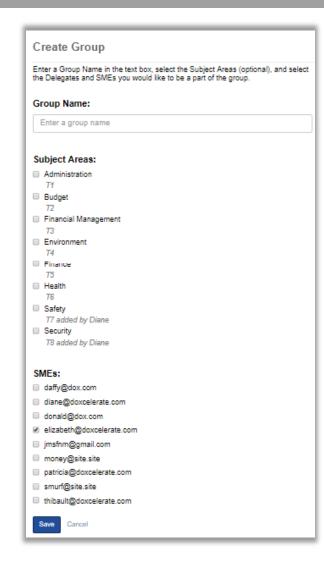
Select membership:

- An SME or Delegate can be assigned to more than one Group
- One or more Subject areas can be assigned to a Group

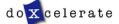
NOTIFICATIONS:

When you have assigned a Subject Area to a Group, that **group will receive automatic notification** when the draft goes online.

You do not have to assign users unless you wish to add to those already assigned.







Set Due Dates If you are going to change Due Dates, it is best to make the Version ▼ change before you assign reviewers. Otherwise, they will receive two emails, one detailing the assignment and due date Section List and a second changing the due date. Comment List In the Version menu, Set Due Dates select Set Due Dates Assign User SMEs due date: 11/06/2017 Submit Package Date packages are due from organizations submitting comments to your organization: Dox OR: 11/06/2017 This is your suborganization AO Email: RevCom: AO ASSIGNMENT / UPDATE - Review and Comment - DOE P XXX.X, Title You have been assigned the following RevCom activity for DDE-Directives. Your current (or updated) due date is listed below. Activity: Review and Comment Document: DOE P XXX.X, Title Your Due Date: %due-to-org-date% Due to: %due-to-org% Your SMEs' and reporting organizations' Due Date: %due-date% Enter Additional Text: Here, you add any additional information the reviewer needs to complete the review Notifications will be sent when you Update & Notify



Assign Users Version ▼ In the Version menu, select Assign User Section List Comment List Select groups or individuals to review the document. Set Due Dates Assign Users When your selections are Assign User complete, Submit Package Notify Users Currently Assigned Groups ACs/Delegates last notification date in red SMEs last notification date in red diane@site.site Ann Delegate ■ diane@juju.com Budget Patricia Greeson Chris Tirado ✓ diane@site.site - Not Notified -Ann Delegate · RevCom Support DPC Muriel Johnson 01/21/16 11:30 AM ■ diane@site.site jack@doxcelerate.com Patricia Greeson 01/21/16 11:30 AM jmcdonald@doxcelerate.com Patricia Greeson · mickeyd@doxcelerate.com RevCom Support DPC 01/21/16 11:30 AM jmsfnm@gmail.com patricia@doxcelerate.com Arthur Delegate - Not Notified - topdog@site.site One Delegate minnie@ju.com Workerbee@site.site Ruby Redd mudijo1211@gmail.com minnie@ju.com A Sample Delegate - Not Notified -Notify Users ✓ topdog@site.site The Delegate ✓ topdog@site.site - Not Notified -■ Workerbee@site.site ■ Test Account 1 ■ Workerbee@site.site - Not Notified -Contracts mickeyd@doxcelerate.com minnie@ju.com ✓ topdog@site.site

In this example, you will note by the dates at right of their names that three reviewers have already been notified. Your notification will go only to new reviewers.



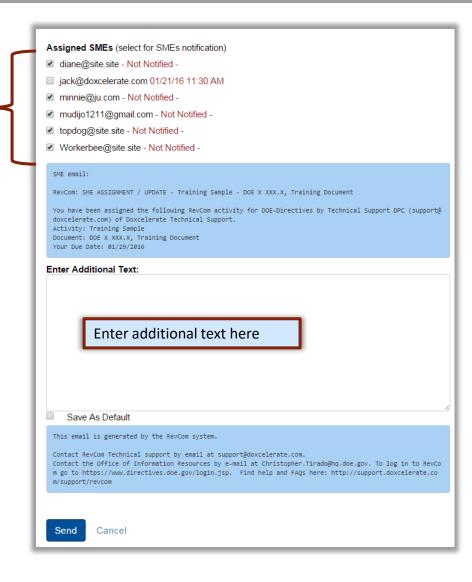


Notify Users

Reviewers to be notified are listed. Check marks indicate that these people will be notified.

You can Enter Additional Text

Send





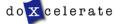


Carry-over Reviewers

When new versions for the document are posted, the Delegate can choose the same reviewers as were assigned previously. The example below is from Technical Standards. This slide will be updated when there are examples in Directives RevCom.

Assign Users								
Entire Document: DOE-STD-3013-YR (PJS 2017-05), Stabilization, Packaging, and Storage of Plutonium-Bearing Material, All TSMs Review and Response								
Your comments are due to Maxcine Maxted of DOE/SRO by 06/08/2018.								
Assign users to this document by selecting the checkboxes. Current assignments, if any, are checked; changes will override them. If a group is selected, all users in that group are assigned, regardless of individual selections in that group. Notify the assigned users in a separate step by clicking the Notify button.								
Assign Users Get users and groups from another activity: DOE-STD-3013-YR (PJS 2017-05), Stabilization, Packaging, and Storage of Plutonium-Bearing Material, All TSMs Concurrence DOE-STD-3013-YR (PJS 2017-05), Stabilization, Packaging, and Storage of Plutonium-Bearing Material, All TSMs Response Negotiation DOE-STD-3013-YR (PJS 2017-05), Stabilization, Packaging, and Storage of Plutonium-Bearing Material, All TSMs Review and Response DOE-STD-3013-YR (PJS 2017-05), Stabilization, Packaging, and Storage of Plutonium-Bearing Material, All TSMs PJS								
Currently Assigned	Groups	Delegates	last notification date in red	SMEs	last notification date in red			
	 ✓ Accounting ✓ bmiller@doxcelerate.com ✓ braves.fan@site.site ✓ budget.expert@site.site ✓ money.woman@site.site 	☐ Test Accou ☐ Diane John ☑ Jim Test D ☐ Modine Gu ☐ Elizabeth I	nson elegate inch		rs.gov rate.com site .net ectenhancement.com			





Add Comments

When you have opened the document for review, you will see a section list at left. Note that your deadline for review is listed, too.

Section List

Your comments are due to RevCom Support Writer of Doxcelerate Technical Support by 01/29/2016.

Submit Comments

Please submit your comment package when you have finished. You can resubmit if you add/change comments before your deadline.

[2:1] 1. PURPOSE

[1:0] _ 2. CANCELLATION

[1:0] 3. DEPARTMENTAL APPLICABILITY

[1:1] 4. REQUIREMENTS

[0:0] **5**.

RESPONSIBILITIES

[0:0] **7. REFERENCES**

RESPONSIBILITIES.

Secretary of Energy.

- (1) Issues, approves or cancels Policies, Orders and Notices or delegates approval authority to the Deputy Secretary.
- (2) Approves an expedited process for a directive other than the 150 calendar days or delegates to the Deputy Secretary as appropriate.
- (3) Approves the cancellation of Policy memoranda or conversion into the Departmental Directives Program or delegates authority to the Deputy Secretary.
- (4) Resolves impasses on proposed directives or delegates resolution to the Deputy Secretary as appropriate.

Add Comment

Deputy Secretary.

- (1) As the Secretary's designee, approves and cancels Policies, Orders and Notices.
- (2) Approves an expedited process for a directive other than the 150 calendar days when necessary.
- (3) Approves the cancellation of Policy memoranda or conversion into the Departmental Directives Program.
- (4) Resolves impasses on proposed directives when they occur between the office of primary interest (OPI) and opposing Departmental elements, organizations or offices, or Central Technical Authorities upon delegation of such authority from the Secretary.

Add Comment

Review text. The Add Comment button allows you to comment on the text immediately above.





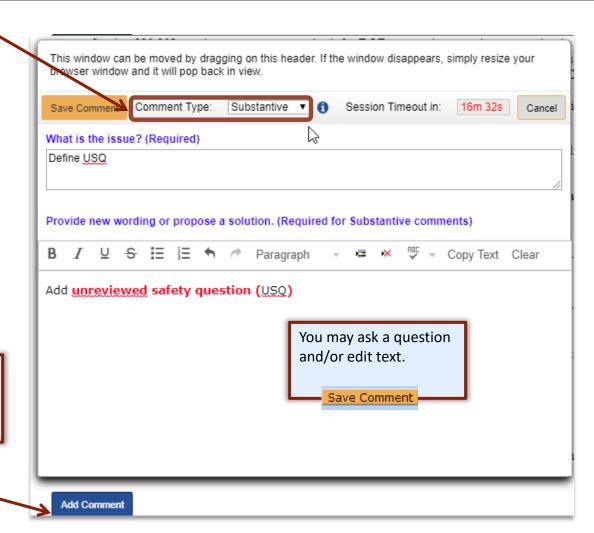
Add Comments

You must choose comment type

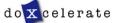
Substantive comments address issues serious enough to preclude or significantly hamper accomplishing the program mission; complying with laws, rules and regulations; or fulfilling contractual obligations and formal commitments

Editorial comments are text corrections

Click on Add Comment to open a window for your comment about errors in the first paragraph.

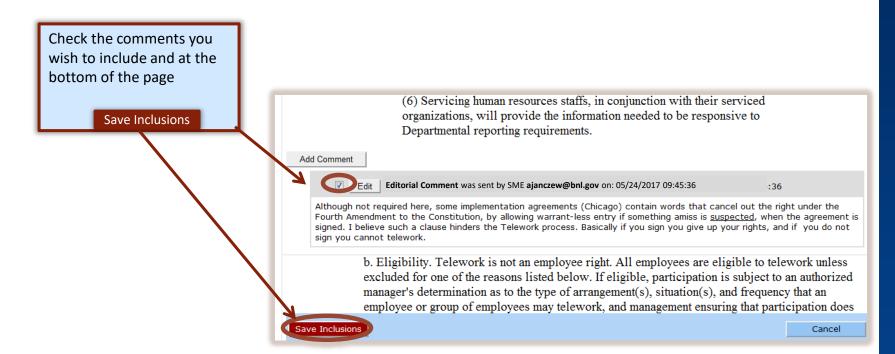






Include/Exclude Submitted Comments

You will review comments submitted by your SMEs and Reporting Organizations.



Submit Comments

Please submit your comment package when you have finished. You can resubmit if you add/change comments before your deadline.





Complete Submission

Instructions for Delegate submissions

When you have completed your review, click on the Submit button to notify your Approval Coordinator and post your comments, changes, and recommendations to the system.

Use the Reports menu to review your work on this document.

Click one of the buttons below to submit the package.

Submit Comments

Submit your comments.

No Comments and Submit

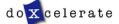
Submit that you have no comments on this document.

Your submission has been recorded.

Warning: Please make sure that you selected some users if you want to send a notification. No notification sent.

This note will show at the top of the page to confirm your submission.





Reports – Comment Response

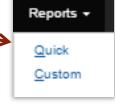
When the comment period closes **on a document to which you are assigned**, the author has 30 days to respond to comments submitted by Headquarters offices (Top Organizations)

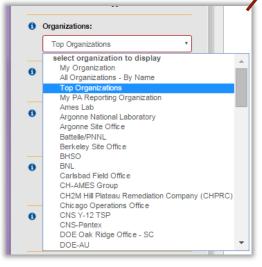
Acceptance Levels are

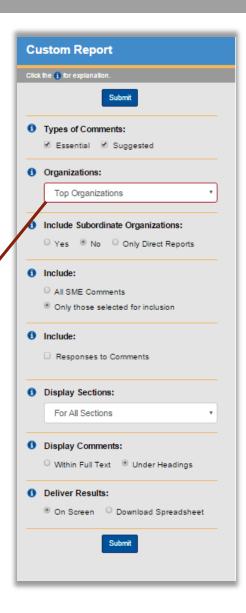
- Accept The author will revise text as the reviewer requests
- Accept with Modifications The author accepts the comment but may not revise exactly as requested
- Reject No proposed solution provided

For the comment response report—with the document open—in the Reports menu, select Custom

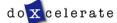
You can also select specific organizations for your organization's purposes.











Reports - Comment Disposition

After submitting your comment package, you can track disposition.
On the Document List, select Comment Disposition and History (below the title).

Comments are marked that they were included (♠) or not included (★) in the organization's submission

Author responses are included above your

DOE O XXX.X Directive for Testing

Subject Areas for this Activity: None selected.

Comment Disposition & History | References | Discussion

- ↑ Included. Package Sent 05/11/2020 by Patricia Greeson (Tech Support) from Doxoelerate Technical Support
- Included. Package Sent nil by Annie Delegate from Doxcelerate Technical Support Minor Comment by diane@doxcelerate.com (SME) on 05/11/2020 15:25:08

This is another comment on paragraph 1

Author Response: Sent by RevCom Support Writer on 05/11/2020 14:49:19
Accept with Modifications Fixing agreement errors

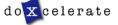
ncluded. Package Sent 05/11/2020 by Patricia Greeson (Tech Support) from Doxcelerate Technical Support

Included. Package Sent nil by Annie Delegate from Doxoelerate Technical Support Minor Comment by patricia@doxoelerate.com (SME) on 04/18/2019 12:34:26

simple, straightforward languages that describes the desired results by issuance of the directive.

1-1-2

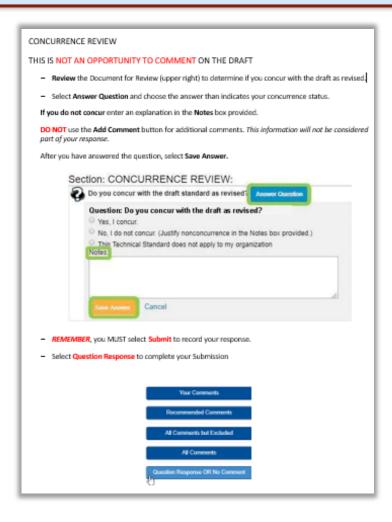
1-1-1



comment.

Concurrence

For concurrence, you are reviewing a draft that has been redlined to show the author's responses to reviewer comments. You will answer a question about your concurrence (whether you are satisfied with the revised draft). When you open the document, you will see the question along with instructions for the review.



Note that you are instructed *not* to add comments except in the Notes box. Select

Answer Question





Answering the Question

Section: CONCURRENCE REVIEW:

Do you concur with the draft as revised Answer Question

CONCURRENCE REVIEW:

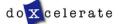
The Entire Document will be a redlined version showing changes in response to reviewer comments.

You can assign SMEs and ACs/Delegates to review the revised document. Their submissions will be the basis for your submission on behalf of your organization.

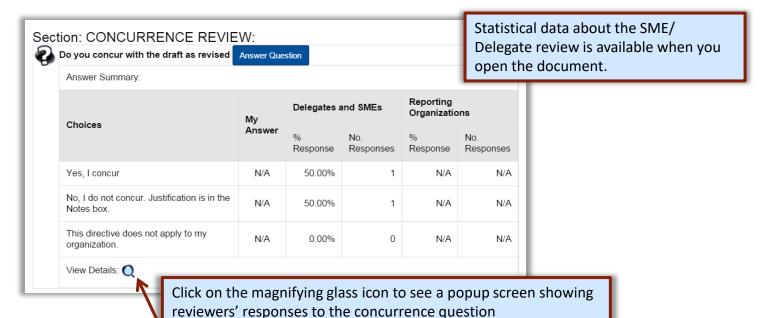
Section: CONCURRENCE REVIEW:

Do you concur with the draft as revised	Answer Question				
Answer the Question: Do you concur with the draft as revised					
Yes, I concur					
No, I do not concur. Justification is in the Notes box.					
This directive does not apply to my organization. Notes:					
I do not concur because					
Save Answer Cancel					





Reviewer Responses



You will base your organization's concurrence on the information your reviewers submit

Section: CONCURRENCE REVIEW:

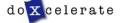
Question: Do you concur with the draft as revised

Hear

Answers:

	User	Answer	Notes
Delegates and SMEs	patricia@doxcelerate.com	Yes, I concur	
	queenie@doxcelerate.com	No, I do not concur. Justification is in the	The document still has problems in
		Notes box.	requirement





Notes

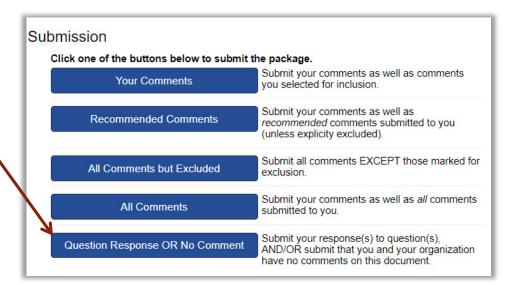
Submitting Concurrence

When you have decided on your concurrence,

Submit Comments

For concurrence review, you select Question Response OR No Comment

NOTE: You are instructed that this is not an opportunity to comment. For concurrence review, choose one of the answers to the question. If you have not answered the question or you have not saved your response your submission will be recorded as No Comment. Do not submit No Comment.



You are about to forward your response(s) to question(s) and/or forward a statement that you have No Comment on the reviewed document.

Do you want to continue?

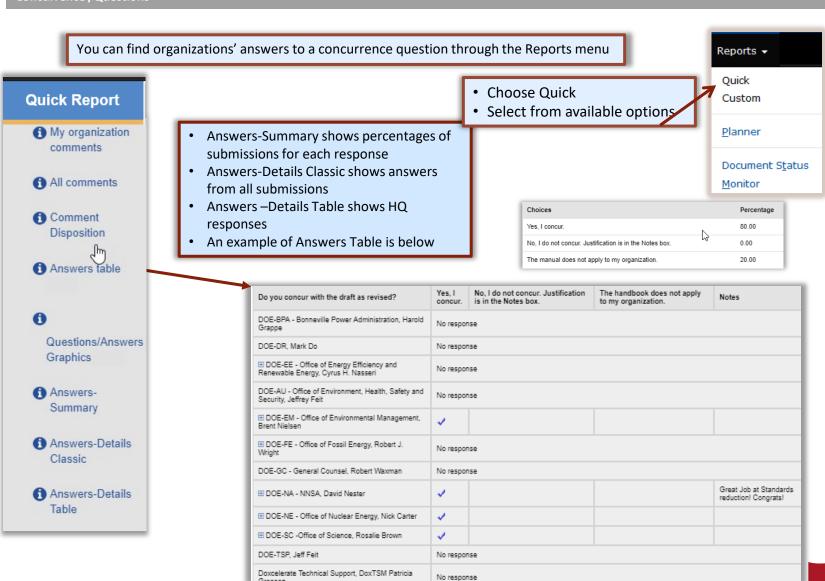
ОК

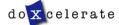
Cancel

A popup note will ask if you want to continue (complete your submission)



Concurrence / Questions





Troubleshooting

- You do not have to complete comment entry or review of SME comments in one sitting
- You must be certain that you have selected Save Comment for each of your entries
- You must select Save Inclusion for all comments you will send forward as being representative of your organization
- If the document is open for review, you can submit comments (your package) and go back in to revise comments or inclusions then resubmit to overwrite the previous submission

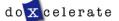
CAUTION:

This timer shows how much time remains in your session. As long as you are active (entering or reviewing comments) it will not time-out.

If you leave your office or have a visitor or telephone call, it is best to save your work. Otherwise, the system will time out after 30 minutes and your unsaved work will be lost.







Questions

Have Questions?
Need Assistance?
Need Training?

Support@Doxcelerate.com

865-482-0401



