How to Use Periodic Review

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INTRODUCTION

Periodic Review is a feature you can activate on guides to prompt review at regular intervals. This is a useful feature for managing internal documentation, as it lets you proactively check for out-of-date content rather than waiting for it to be reported.

Step 1 — Setting a Periodic Review Schedule on a Guide

- On the **Introduction** tab of the editing interface, navigate to **Periodic Review**.
  - Click **Add**.

- A modal appears, prompting you for more detailed information. Click the checkbox to **Enable periodic review on this guide.**
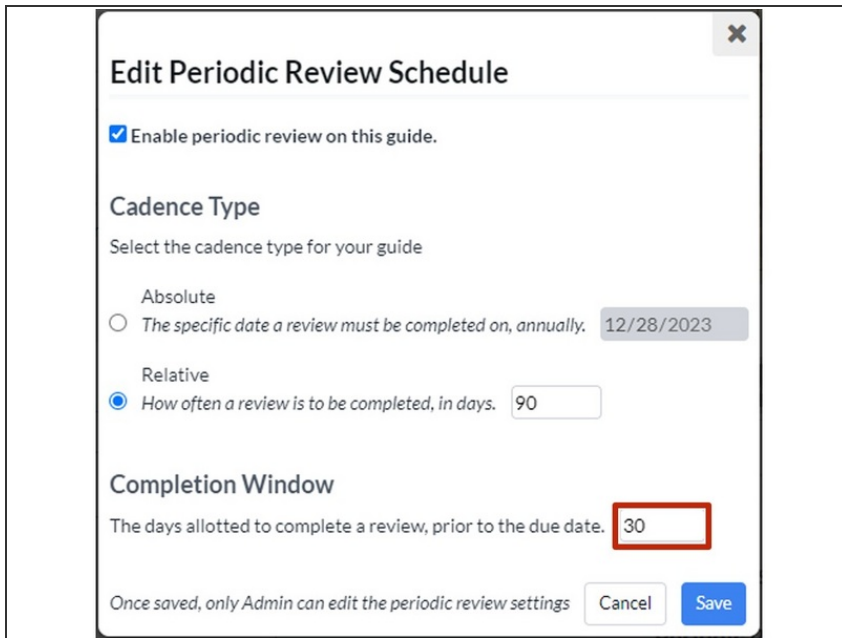
Step 2 — Cadence Type

- (i) The two different cadence types, **Absolute** and **Relative,** lets you set custom dates and intervals for regular review.

  - Set **Absolute** review dates for content that must be reviewed annually, on or before a specific date.

  - Set a **Relative** review date for content to be checked at regular intervals, specified in the number field.
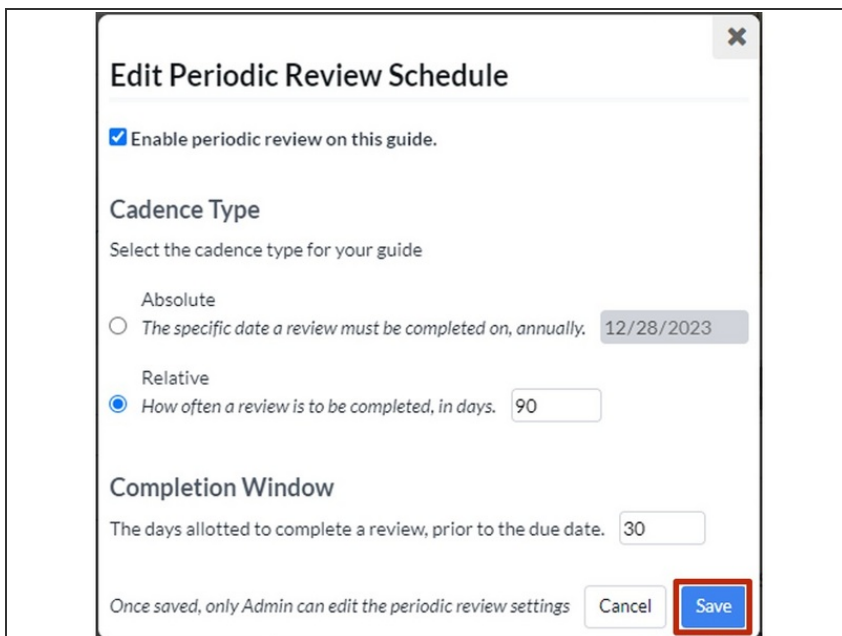
Step 3 — Completion Window

- Enter a number into the field to specify a **Completion Window** for the reviewer, between the time they're assigned the review and the review due date.
  - (i) This can apply to either cadence type.

Step 4

- Click **Save** to finalize your periodic review schedule.
- (i) Setting or editing a periodic review schedule does not create a new draft of the guide, meaning the schedule can be freely adjusted **by an admin** (authors can initially set up a schedule, but cannot edit a set schedule).
  - (📌) This means that approvers assigned to that guide's approval process **will not** be notified of a change.

Step 5 — Site-Wide Defaults

ⓘ The same functions available on an individual guide can also be set as site defaults.

● On the Management Console, under **Configuration > General**, scroll down to **Periodic Review.**

● Click on an individual sub-menu to change its settings, accompanied by more detailed information.

● Enable/disable Periodic Review ([Step 1](#))

● Cadence type and date ([Step 2](#))

● Completion Window ([Step 3](#))