



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 This is a useful feature for managing internal documentation, as it lets you proactively check for out-of-date content rather than waiting for it to be reported.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

The screenshot shows the 'Introduction' tab of the editing interface. The 'Periodic Review' section is highlighted with a red box, and an orange arrow points to the 'Add' button. The modal 'Edit Periodic Review Schedule' is open, showing the 'Enable periodic review on this guide.' checkbox checked, 'Cadence Type' set to 'Relative' with a value of 90 days, and 'Completion Window' set to 30 days.

- 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**.

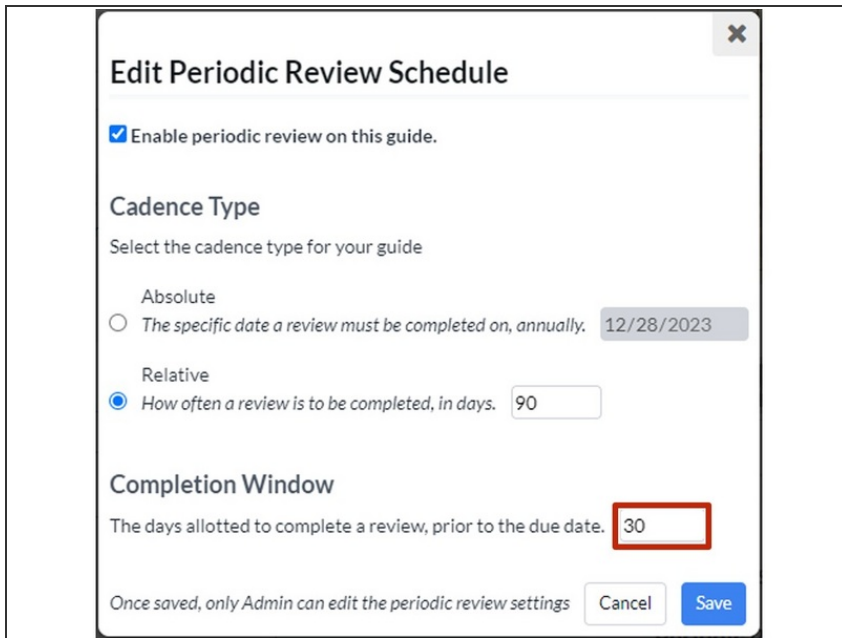
Step 2 — Cadence Type

The screenshot shows the 'Edit Periodic Review Schedule' modal. The 'Cadence Type' section is highlighted with a red box, showing 'Absolute' and 'Relative' options. The 'Relative' option is selected with a blue radio button and a value of 90 days. The 'Completion Window' section is highlighted with an orange box, showing a value of 30 days.

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



Edit Periodic Review Schedule

☒ Enable periodic review on this guide.

Cadence Type
Select the cadence type for your guide

☐ Absolute
The specific date a review must be completed on, annually. 12/28/2023

☒ Relative
How often a review is to be completed, in days. 90

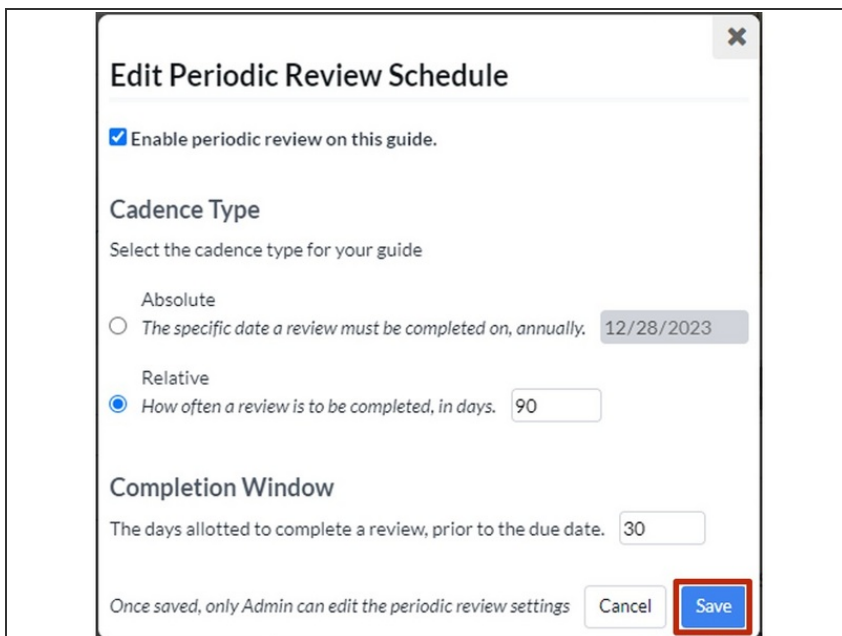
Completion Window
The days allotted to complete a review, prior to the due date. 30

Once saved, only Admin can edit the periodic review settings

Cancel Save

- 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.
- ❗ This can apply to either cadence type.

Step 4



Edit Periodic Review Schedule

☒ Enable periodic review on this guide.

Cadence Type
Select the cadence type for your guide

☐ Absolute
The specific date a review must be completed on, annually. 12/28/2023

☒ Relative
How often a review is to be completed, in days. 90

Completion Window
The days allotted to complete a review, prior to the due date. 30

Once saved, only Admin can edit the periodic review settings

Cancel Save

- Click **Save** to finalize your periodic review schedule.
- ❗ 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

Periodic Review

Guide Defaults

Enable Periodic Review

Periodic review on guides is **enabled**

Edit

→ Default Cadence Type

The default cadence type is **absolute**.

Edit

→ Default Absolute Cadence Date

The absolute review date is set to occur annually on **January 1st**.

Edit

→ Default Relative Cadence Span

The relative review cadence span is set to every **90** days.

Edit

→ Default Completion Window

The completion window is set to **30** days.

Edit

Guide Defaults

Enable Periodic Review

→

☒ Enable Periodic Review.

Cancel

When enabled, Guides will be available for periodic content review (e.g. for compliance purposes).

Save

Default Cadence Type

→

☒ Absolute (The review will occur every year on the specified date, see Absolute Cadence Date)

Cancel

☐ Relative (The review will occur at the specified interval, see Relative Cadence Span)

Save

Default Absolute Cadence Date

→

The absolute cadence date specifies the date a review must be completed every year.

01/01/2023

Calendar icon

Cancel

Save

Default Relative Cadence Span

→

The relative cadence span specifies how often a review is to be completed in days, when the Cadence Type is Relative.

90

Cancel

Save

Default Completion Window


→

The completion window specifies the time allotted to complete each review, prior to the due date.

30

Cancel

Save

 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](#))

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