

Managing File Review Templates

Users who create File Review Templates can also manage their availability for use from the File Review Templates List Page.

A newly created File Review Template is assigned a Draft status and a minor version number of “.1”. A template with a Draft status can be edited if needed to make changes to the definition. To edit a Draft template, select “Edit Metadata” from the template’s Actions Menu. On the Edit Metadata screen, make changes as desired and select “Save.”

You can make a template in Draft status “effective” to make it available for use in File Review creation. To make a Draft template effective, select “Make Effective” from the template’s Actions Menu. An effective template is assigned the next major version number (e.g., 1.0) Once a template is effective, changes can no longer be made to the template definition. To make changes, you must return to the template to Draft status by selecting “Revise” from the template’s Actions Menu. This action increases the version number by .1 (e.g., 1.1)

If you want to retire the template from use, select “Make Obsolete” from the template’s actions Menu. An obsolete template is not available in File Review Creation, nor can it be edited. An obsolete File Review Templates can be made effective if needed.