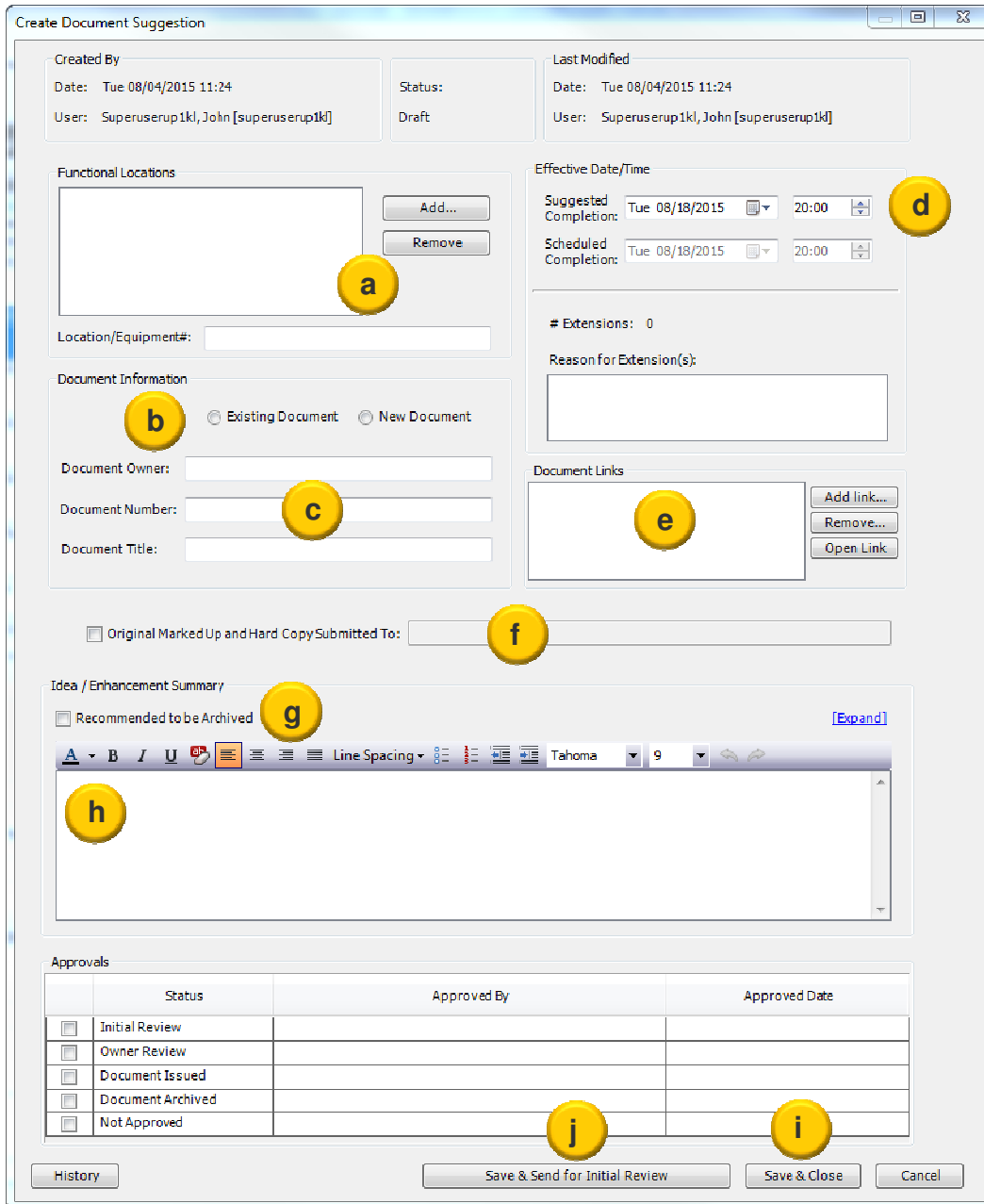## Helpful Hints

- The purpose of the Document Suggestion eForm is to:
  - Provide end users of documents a method for submitting suggestions. Document suggestions may include changes or enhancements to existing documents or a suggestion for an entirely new document.
  - Allow areas to track, approve, and provide feedback to the end users.

- The Document Suggestion eForm is an optional tool for areas to use. Existing manual change suggestion processes will still be available should an area not adopt the new eForm process in OLT.

- Document Suggestions move through the following workflow:
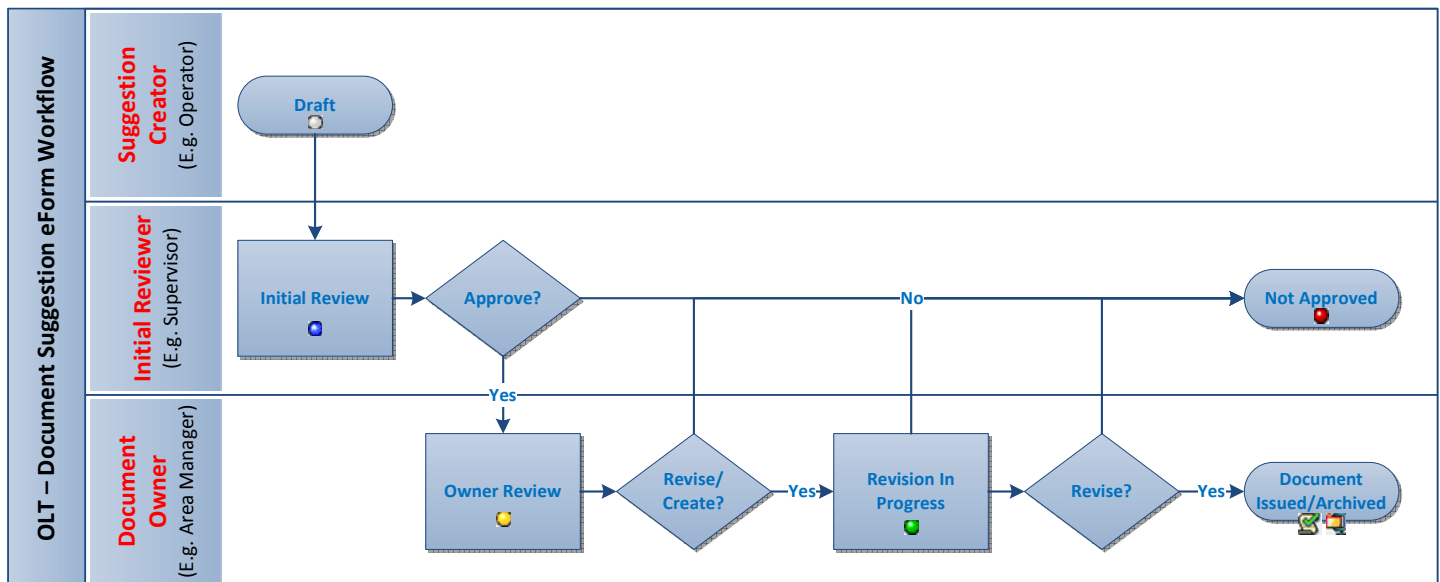
- Suggestion eForms that are not processed by the Initial Reviewer into either a "Not Approved" (🔴) or "Owner Review" (🟡) status by the Suggested Completion date/time will be marked as "Late" (🟣). Similarly, suggestions that are in either "Owner Review" (🟡) or "Revision In Progress" (🟢) that are not processed into a "Not Approved" (🔴) or "Document Issued/Archived" (🖎/🖥) status by the Scheduled Completion date/time will be marked as "Late" (🟣).

  - The Document Owner can update the Scheduled Completion date/time but must provide a comment whenever an extension is set.

- Changes can be made to the Suggestion eForm content at any point before it is moved into a Document Issued/Archived status allowing users to collaborate on the content. Detailed history will be recorded for each change.

- While suggestion content is reviewed and moved through the statuses, pre-populated emails are available. These emails can be used to notify individuals involved in the process and/or request participation in OLT.

- When the status is set to "Revision in Progress", the revision of the document occurs outside of OLT. Follow your area's process for revising a document.

Procedure

1. On the navigation pane, click on the **Forms** icon to navigate to the Forms screen.
2. **Select** "Document Suggestion" from the dropdown box (located beneath the Forms tab).
3. **Click** on the New button to open a new Document Suggestion eForm. **Complete** the fields as required.

a) Select the **Functional Location** that best represents the equipment/system associated with the document suggestion. Enter/update the **Location/Equipment#** as required.

b) Select the appropriate button for either an **Existing Document** or **New Document**.

c) Provide details about the document if known. OLT will fill in some of the fields automatically for New Documents.

d) Enter a **Suggested Completion** date/time for when you would like the Idea/Enhancement completed.

e) Add **Document Links** as desired (e.g. link to a scanned marked up copy of the document). (Optional)

f) Indicate if a **Marked Up Hard Copy was submitted** to an Initial Reviewer instead of or in addition to adding a document link.

g) Select if the document is **Recommended to be Archived**.

h) Provide details about your suggestion. Use the [Expand] link if a larger viewing area is desired.

i) Select **Save & Close** to save a draft of the eForm.

j) Select the button to send the eForm on to its next state. Depending on the current state of the form, options will include: **Save & Send for Initial Review, Save & Send for Owner Review, Revision in Progress, Document Archived/Issued, or Not Approved**.

All **Errors** must be correct before the form can be saved.

An email will be automatically drafted to notify people that a Suggestion is awaiting their review in OLT. Be sure to add the Initial Reviewer's name (e.g. your Supervisor) to the email when submitting for Initial Review and the Document Owner's name when submitting for Owner Review.