



QUICK REFERENCE GUIDE

Reviewing Documents



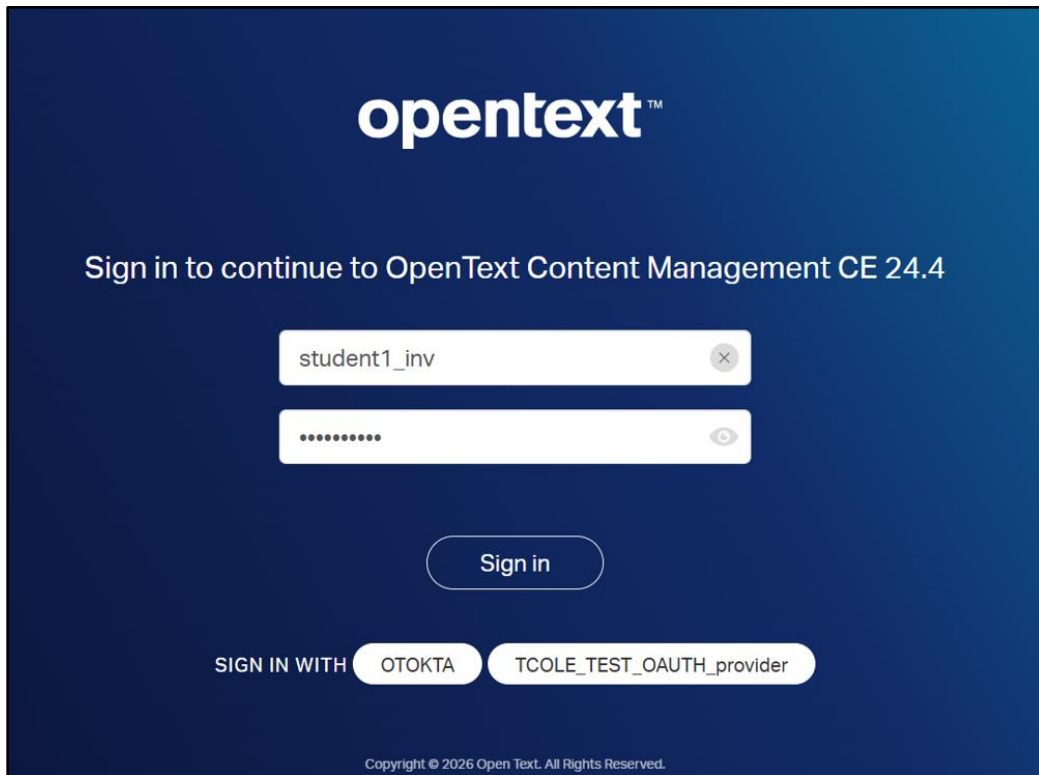
Who Should Use This Guide

Investigators

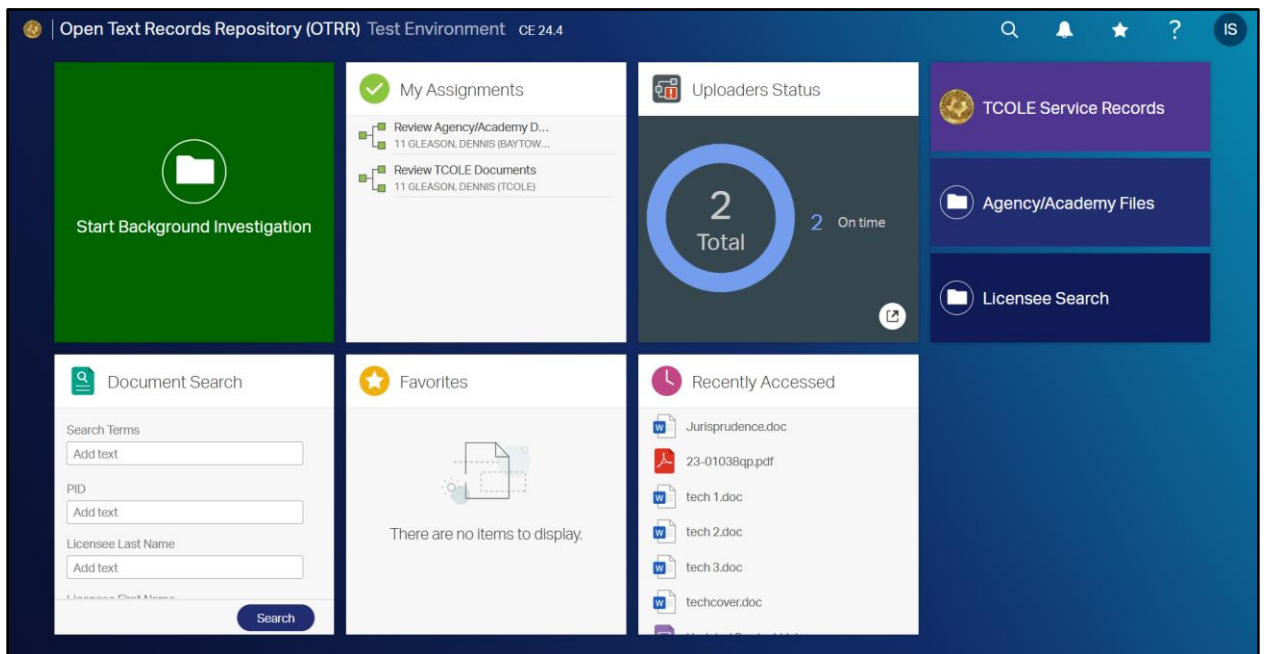
Recruiters


Reviewing Documents (Investigator/Recruiter)

1. Log in to OTRR.



Your Home Page appears, showing tiles based on your role.

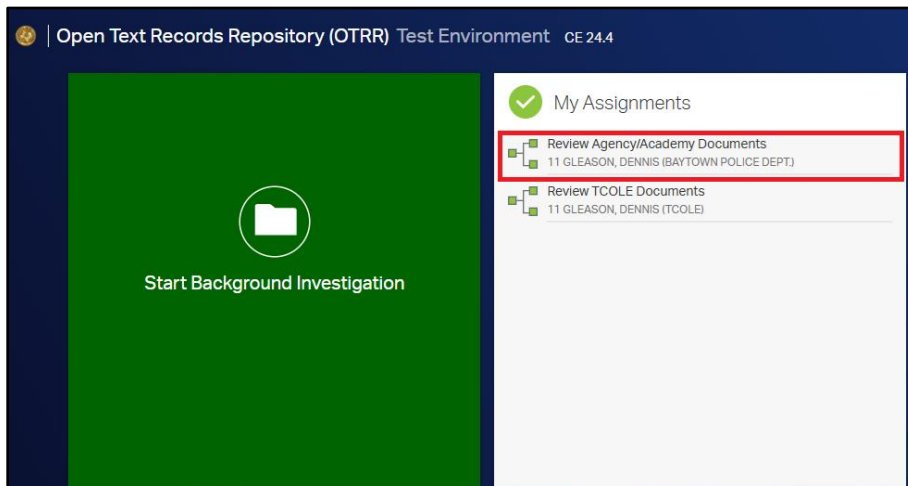


 When documents from TCOLE or agencies/academies are ready for review, OTRR sends you an email notification.

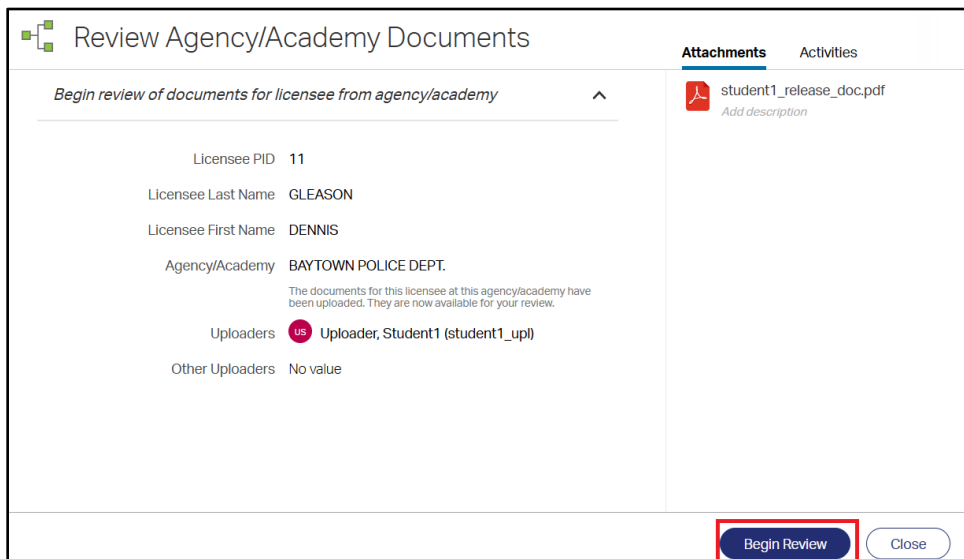
You will mainly use the following tiles:

- **My Assignments** – review tasks assigned to you (e.g., *Review TCOLE Documents*, *Review Agency/Academy Documents*)
- **TCOLE Service Records** and **Agency/Academy Files** – access and review documents for your investigations

2. From **My Assignments**, open the **Review Agency/Academy Documents** task.

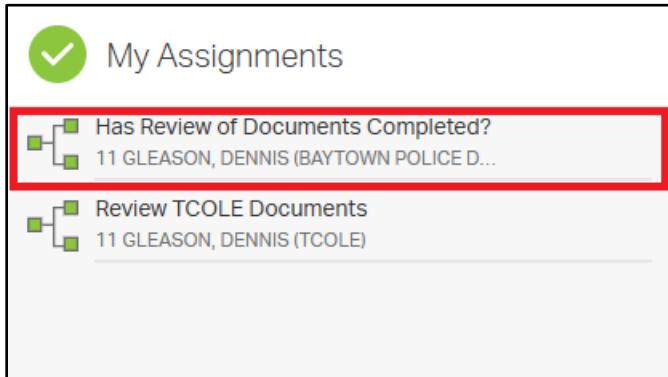



3. Review the information on the page (e.g. uploader name).



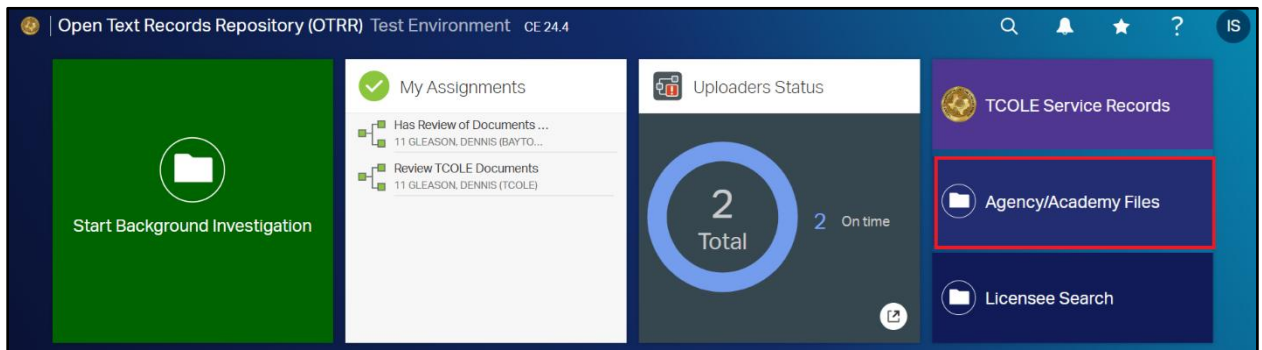
4. Click **Begin Review**.

A new task appears in **My Assignments** tile.

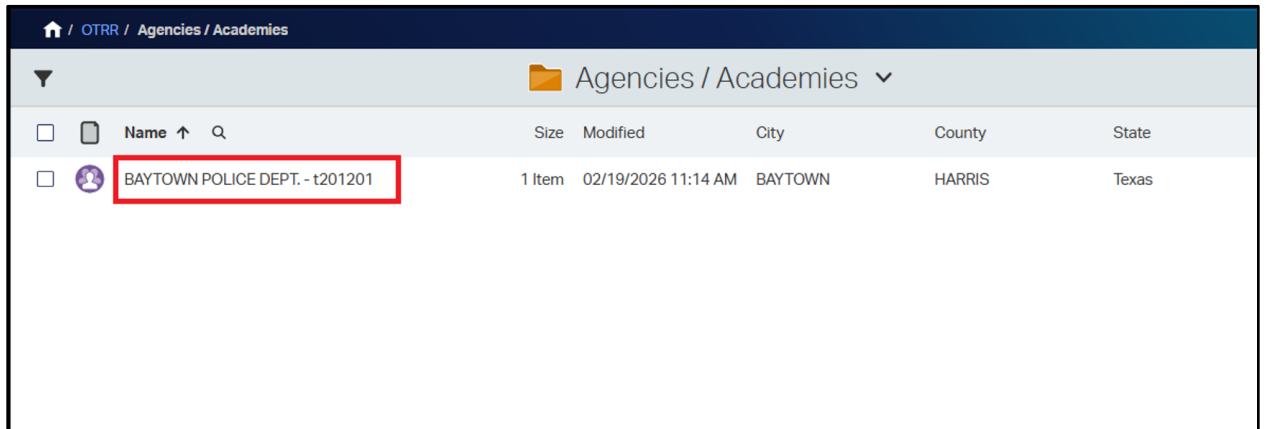


 Review tasks must be completed within 14 days. After the due date, task is marked *Late* and is visible to investigators, recruiters, and TCOLE Admins.

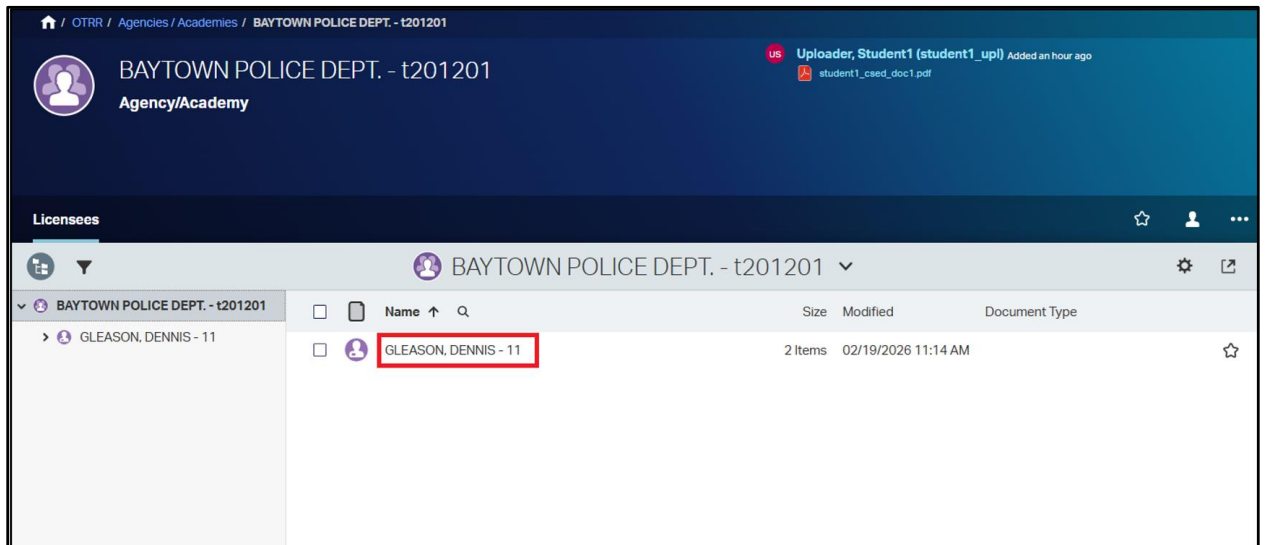
5. Click the **Agency/Academy Files** tile.



6. Select the name of the agency/academy associated with the licensee.



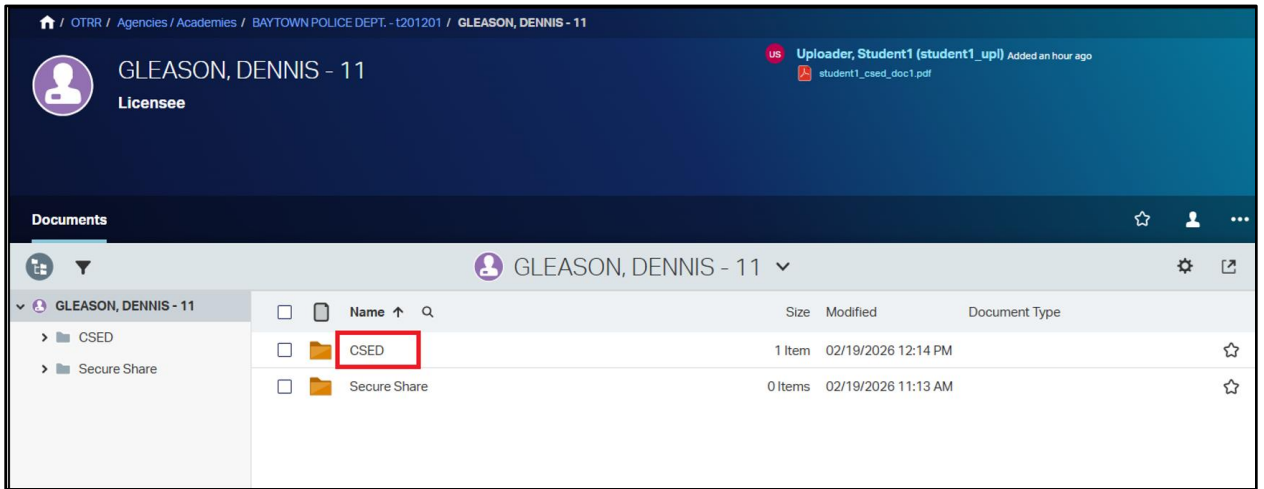
7. Open the licensee workspace.



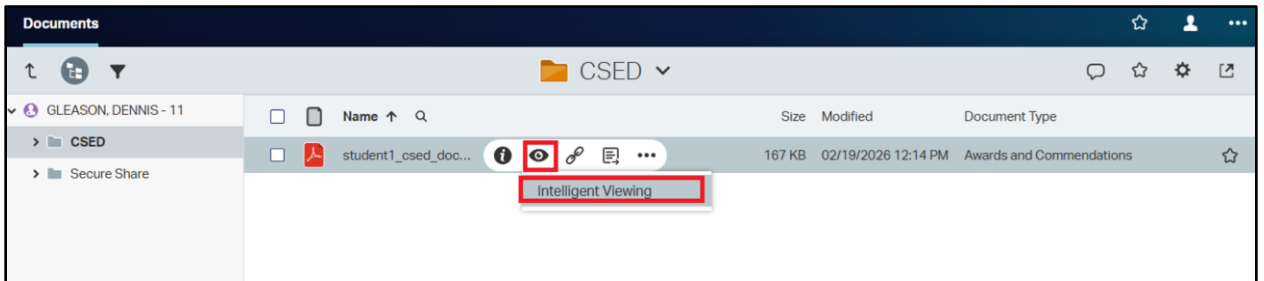
The licensee workspace may contain up to two folders:

- CSED
- Secure Share

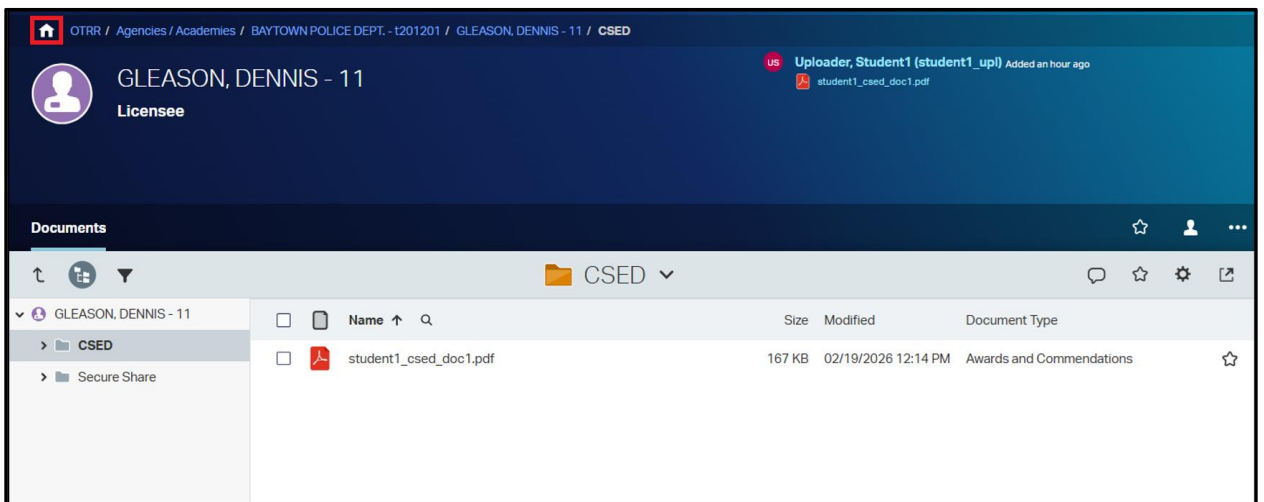
8. Click a folder (for example, CSED).



9. Review the uploaded documents using Intelligent Viewing.



10. Click the Home icon to return to your Home Page.



11. From **My Assignments**, open the **Has Review of Documents Completed?** Task.

Open Text Records Repository (OTRR) Test Environment CE 24.4

Start Background Investigation

My Assignments

- Has Review of Documents Completed?
 - 11 GLEASON, DENNIS (BAYTOWN POLICE DEPT)
- Review TCOLE Documents
 - 11 GLEASON, DENNIS (TCOLE)

Uploaders Status

2 Total 2 On time

12. Click **Review Completed** to complete the task.

Has Review of Documents Completed?

Attachments Activities

When the review of agency/academy documents has completed, please acknowledge.

Licensee PID 11

Licensee Last Name GLEASON

Licensee First Name DENNIS

Agency/Academy BAYTOWN POLICE DEPT.

If the review of documents for this licensee from this agency/academy is completed, please acknowledge.

Uploaders Uploader, Student1 (student1_upl)

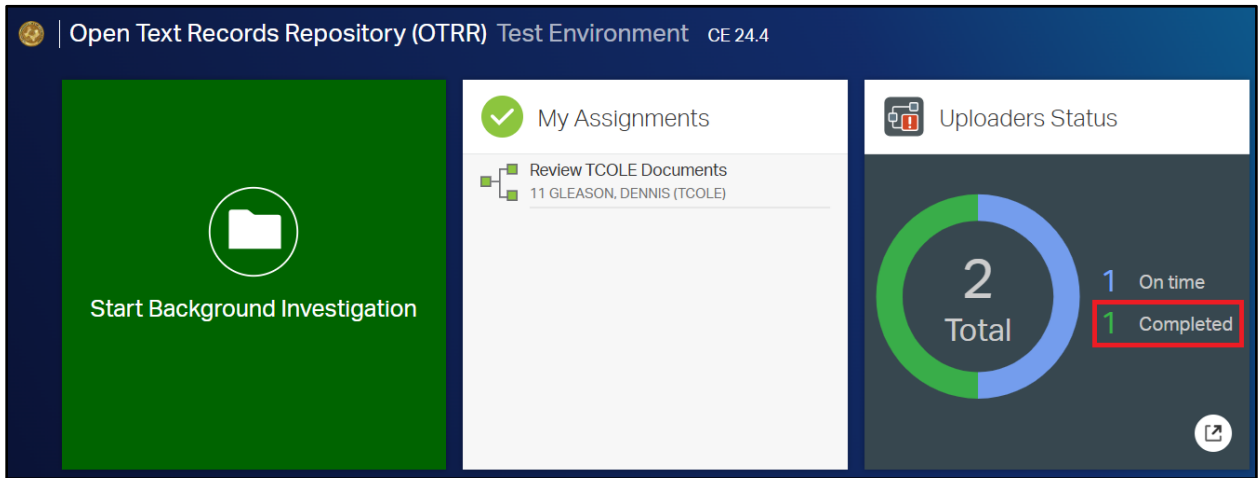
Other Uploaders No value

student1_release_doc.pdf
Add description

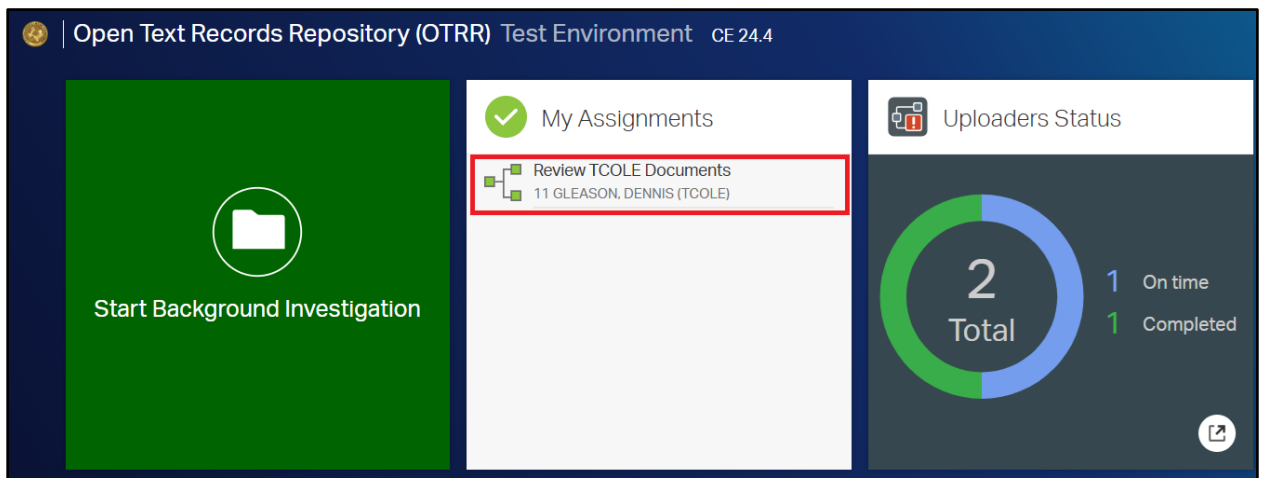
Review Completed Close

The task is removed from **My Assignments**. Your access to the licensee workspace is removed once review is completed.

The **Uploaders Status** Tile updates to show *Completed* for the task.



13. Click the **Review TCOLE Documents** task under **My Assignments**.



14. Review the information on the page.

Review TCOLE Documents

Begin review of documents for licensee from TCOLE ^

Licensee PID 11

Licensee Last Name GLEASON

Licensee First Name DENNIS

The documents for this licensee from TCOLE have been uploaded. They are now available for your review.

Attachments Activities

student1_release_doc.pdf
Add description


Begin Review Close

15. Click **Begin Review**.

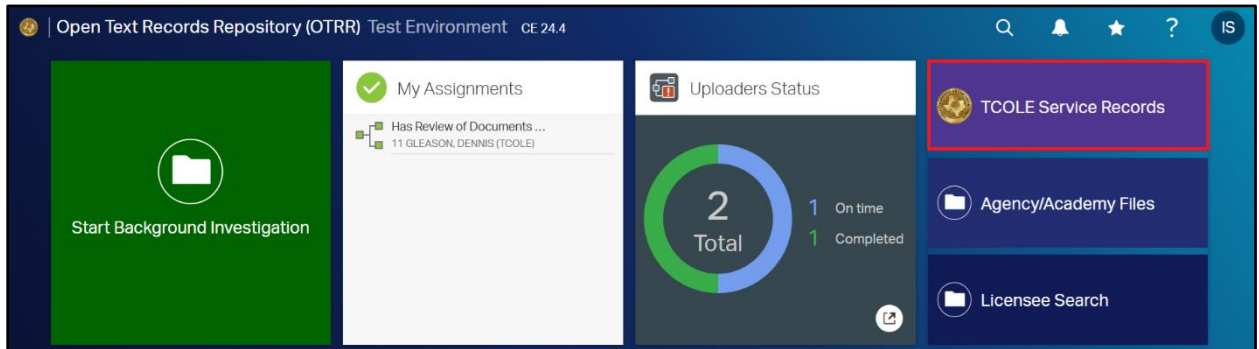
A new task appears in **My Assignments** tile.

My Assignments

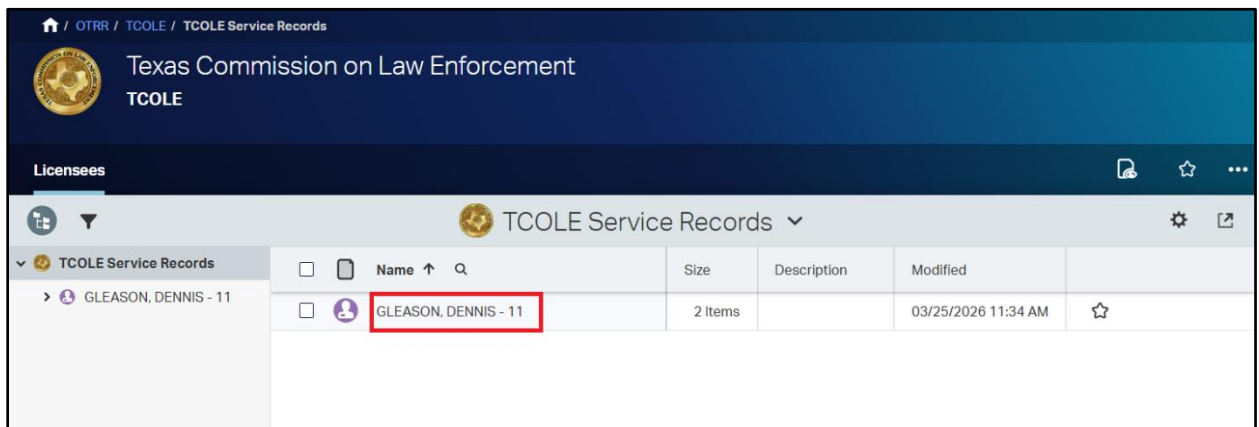
Has Review of Documents Completed?
11 GLEASON, DENNIS (TCOLE)

 Review tasks must be completed within 14 days. After the due date, the task is marked *Late* and is visible to investigators, recruiters, and TCOLE admin

16. Click the **TCOLE Service Records** tile.



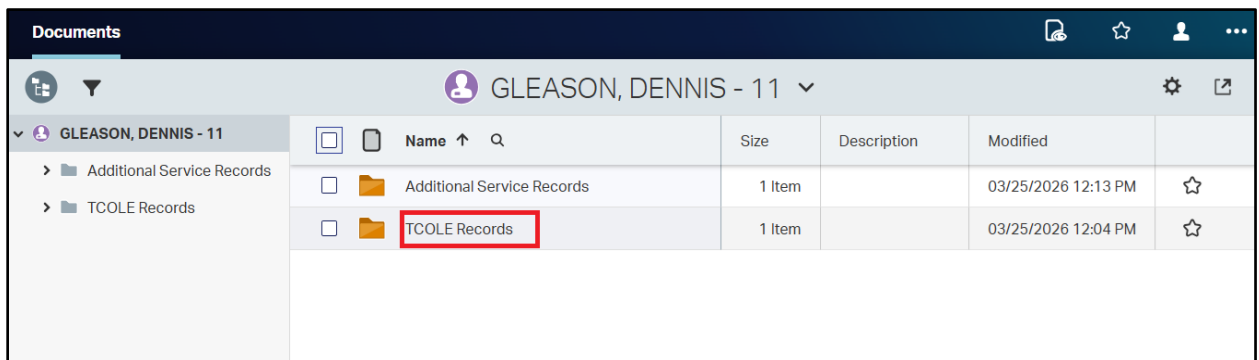
17. Open the licensee workspace.



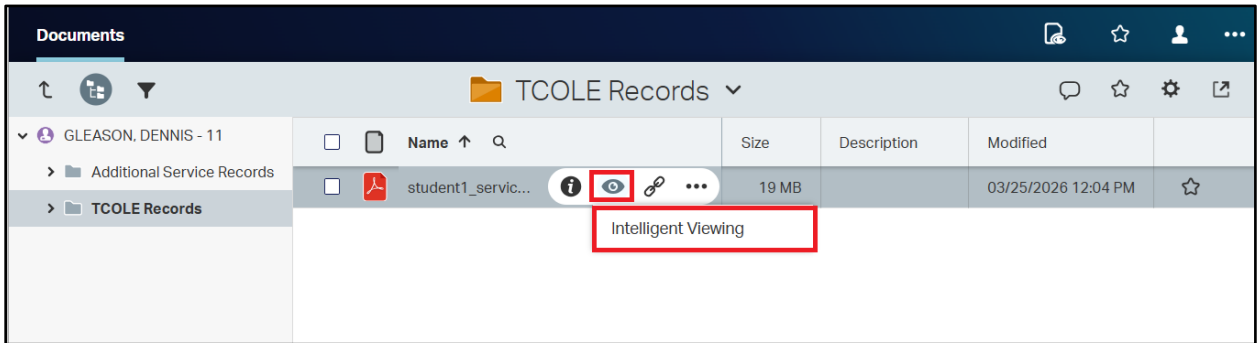
The licensee workspace will contain two folders:

- TCOLE Records
- Additional Service Records

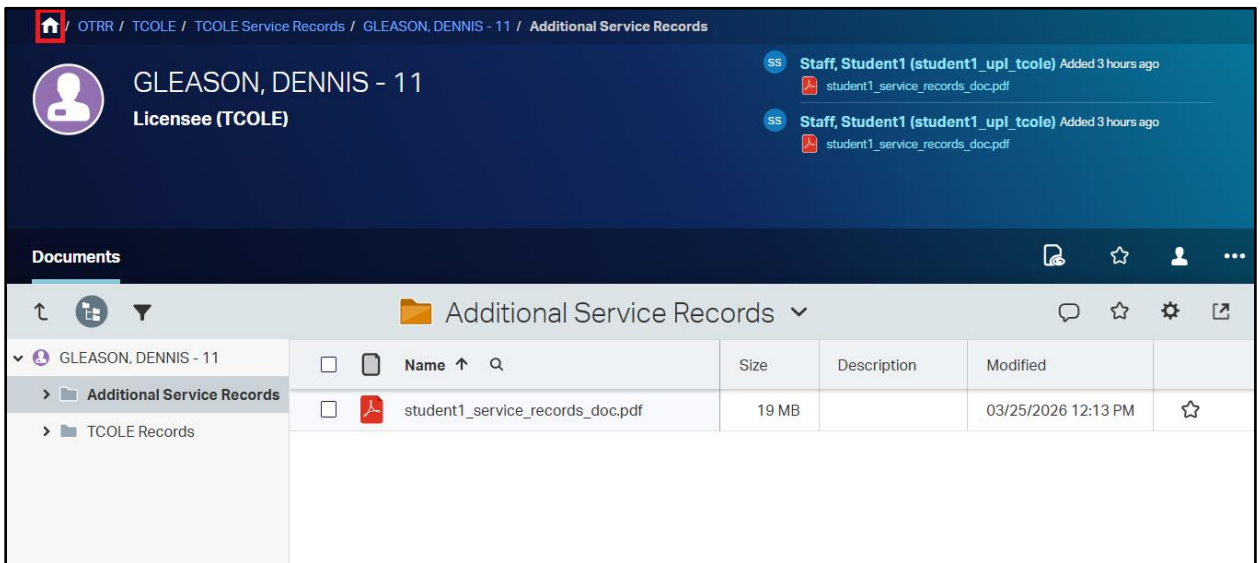
18. Click folder (for example, *TCOLE Records*).



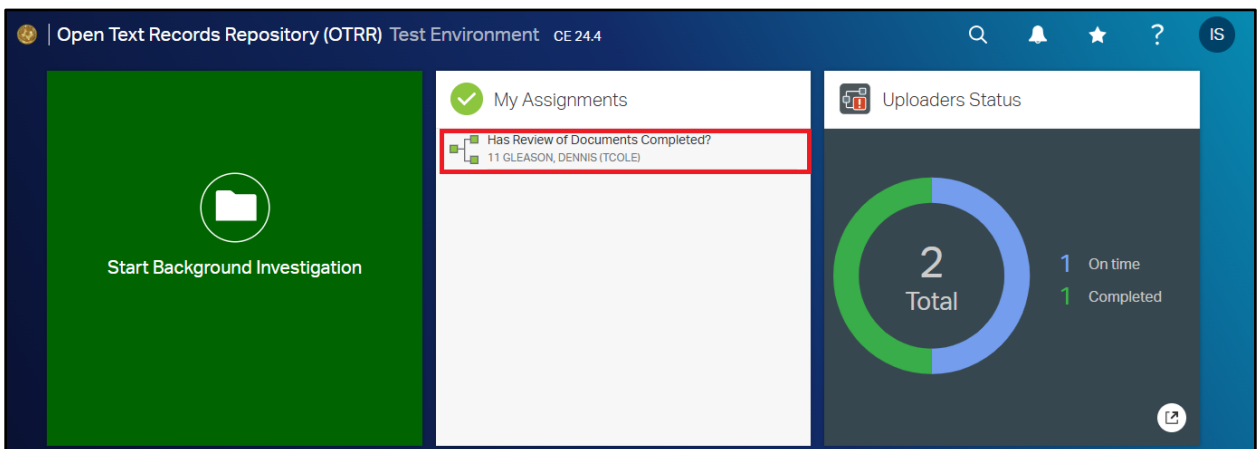
19. Review the documents using Intelligent Viewing.



20. Click the Home icon to return to your Home Page.



21. Open the **Has Review of Documents Completed?** task from **My Assignments** tile.



22. Click **Review Completed** to complete the task.

The screenshot shows a dialog box with the title "Has Review of Documents Completed?". It contains a message: "When the review of TCOLE documents has completed, please acknowledge." Below the message, the licensee information is displayed: Licensee PID 11, Licensee Last Name GLEASON, and Licensee First Name DENNIS. A note states: "If the review of documents for this licensee from TCOLE is completed, please acknowledge." On the right side, there is an "Attachments" tab with one attachment: "student1_release_doc.pdf" with a red "Add description" link. At the bottom right, there are two buttons: "Review Completed" (highlighted with a red box) and "Close".

The task disappears from **My Assignments**. Your access to the licensee workspace is removed after completion.

The **Uploaders Status** tile updates to show *Completed*.

The screenshot shows the OTRR dashboard with the title "Open Text Records Repository (OTRR) Test Environment CE 24.4". It features three main tiles: "Start Background Investigation" (green), "My Assignments" (white with a green checkmark and "No item to display."), and "Uploaders Status" (dark blue). The "Uploaders Status" tile displays a large green circle with the number "2" and the word "Total". A smaller red-bordered box highlights the number "2" and the word "Completed".