



## Overview

### Introduction

This document covers the functional enhancements in the PleaseReview 6.0 release. It does not address the detail of this functionality which is covered in the user manual, but provides an overview of what is new.

This document is for existing PleaseReview users, and those familiar with previous versions of PleaseReview, specifically v.5.1 or v5.2. The document is aimed at business users, while the PleaseReview 6.0 Upgrade Guide is aimed at technical users.

When upgrading to PleaseReview 6.0 all new functionality is automatically available.

### Background

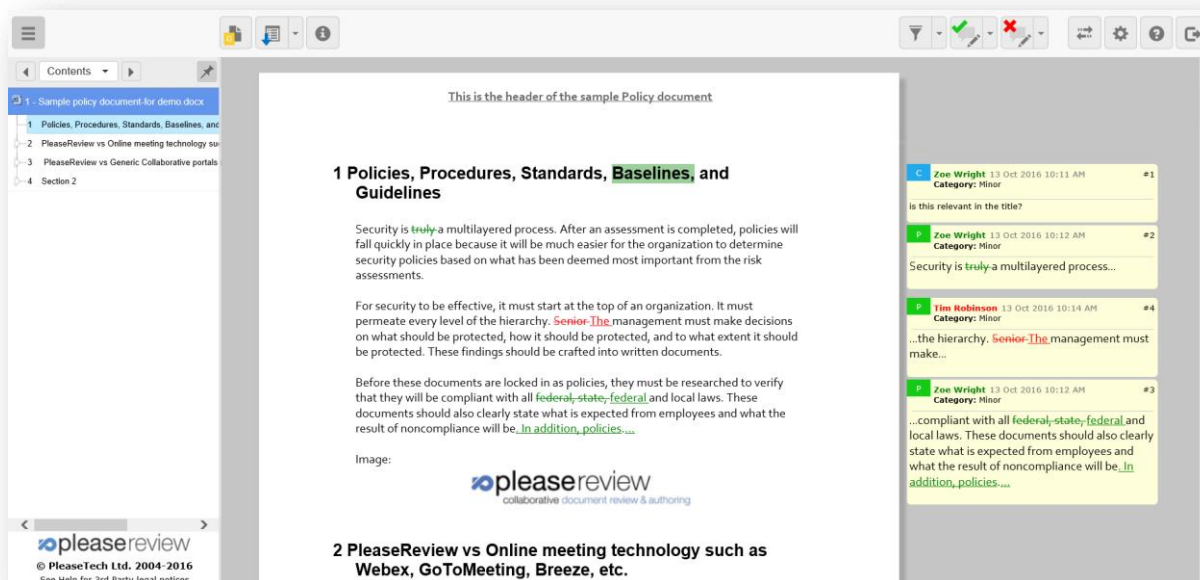
PleaseReview 6.0 provides the following enhancements:

1. A new review interface for Microsoft Word documents which has been designed to be intuitive to users and work on all devices. It includes:
  - All comments displayed alongside the document;
  - Ability to make comments and changes directly in the document;
  - An improved display of headers and footers;
  - Attaching comments to selected text in a paragraph, compared with paragraph level commenting in previous versions;
  - Improved functionality when multiple changes have been made on a paragraph so that only truly conflicting changes need to be resolved with the merge dialogue.
2. A completely new review interface for PDFs, which has also been designed to be intuitive to users and work on all devices, and entirely replaces the PDF plug-in and the 'Review as Image' options. It provides:
  - All comments alongside the document;
  - A range of commenting and annotation tools, including sticky notes, highlighting, insert, replace, delete and drawing options;
  - The ability to redact a PDF using text selection, rectangle or full page(s), and then download the fully redacted documents;
  - The ability to categorize and/or add a comment to each annotation;
  - The ability to zoom, pan and rotate the document;
  - A number of options to accept and close comments via the toolbar or comment;
  - No client plug-in or tools required.
3. Enhancements to the review set up process.

Most of these enhancements are being introduced as a direct result of user feedback. Several will be further developed in future releases.

### Review interface - Microsoft Word documents

In PleaseReview 6.0 Microsoft Word documents will, by default, be presented in the new review interface. This interface has been designed to ensure it is more intuitive to use and works on all devices. An overview of this interface is shown below:



Note that the concept of the comment window or pane has gone, and the user is now able to see all comments and changes on the document without the need to select a paragraph first.

## Navigation

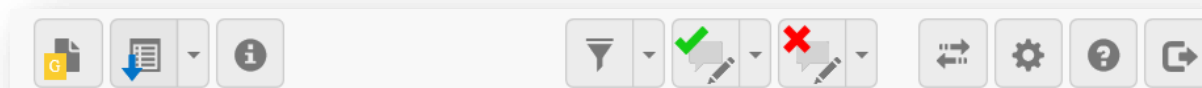
The navigation is still located on the left hand side of the review interface with options to show/hide the navigation as before, along with the ability to pin the navigation pane. The user can also expand and collapse the table of contents.

## Headers and Footers

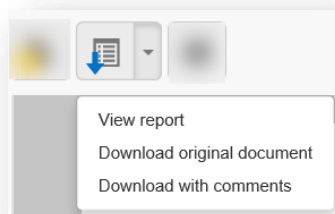
The display of headers and footers has been improved in this interface, and they are now shown seamlessly within the page.

## The PleaseReview toolbar

The toolbar has been rationalized, along with some new and updated icons, as shown below:



In order to simplify the presentation, some toolbar icons have been grouped and replaced with a single icon, and options provided via a dropdown list. The new 'Download and reporting' icon provides access to the reconciliation report and document downloads. Shown below are the options available in the drop down list:



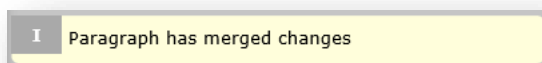
The enhanced filter option allows the user to filter by open comments or use the custom filter. By default no filter is applied. In this instance all comments and changes are displayed in the navigation pane and document display.



If the user selects to display 'Open' comments only, or apply a 'Custom filter', then only open comments or those selected in the custom filter will appear alongside the document and in the navigation. The icon will change to indicate a filter is being applied, as shown below:



The user will also be able to toggle the filter on and off. Note that when there are closed, accepted or merged changes on a paragraph a single information comment is displayed.



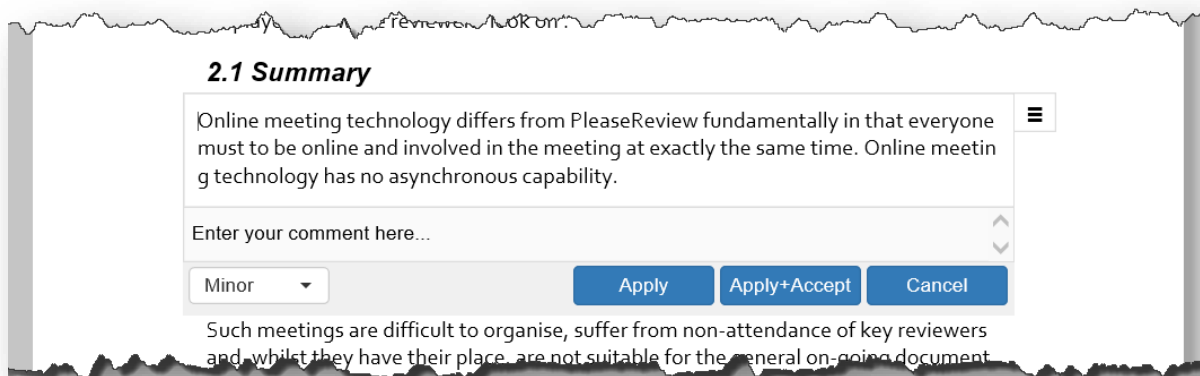
In order to switch between the new and classic interface, the user can use the switch interface icon.



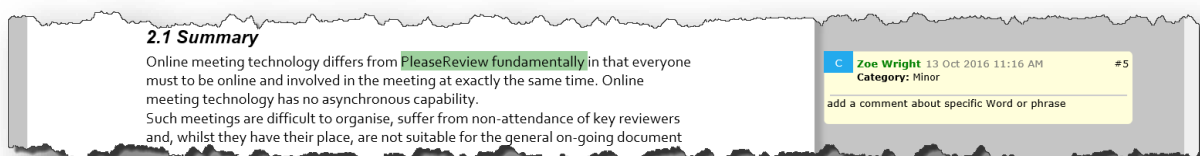


## Making comments and changes

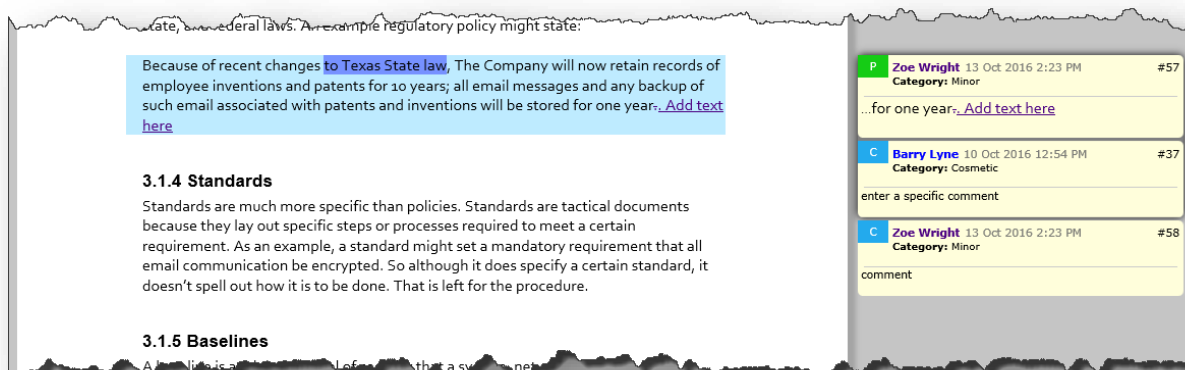
Making comments and proposing changes is now done inline within the text. To make a comment or propose a change, simply click the paragraph, the inline editor appears, and make the change or enter a comment. The user still has the option to select a category before applying the comment or change. The inline editor is shown below:



When making a comment, the user can now select the specific text a comment relates to. To do this simply select the text you want your comment to relate to, enter your comment and apply. The text the comment relates to is highlighted in the document.

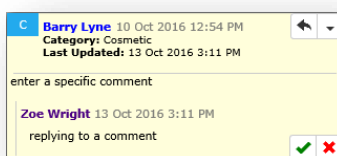


Hovering over a paragraph or a comment will highlight the paragraph, and all the comments and changes related to the paragraph.



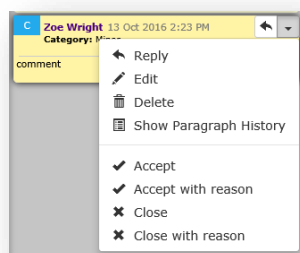
## Replying to comments and changes

The reply option (↩) is located on the top right of a comment or change. To reply, the user simply clicks the icon on the relevant comment or change, and adds their comment before applying. The ability to reply to both the original comment or change or any reply within a discussion thread remains unchanged. The reply option can be seen below:



## Actions menu

The actions available to each user for a comment or change can be found under the action menu (▼). This is located in the top right corner of a comment or change. The actions menu includes actions previously available and some new options. Those actions that were previously available to a user have not changed (i.e. reply, accept, merge, close, revise, edit, delete), and are still based on the comment status, user's role and whether or not the comment or change was made by the user. An example of the actions menus is shown below:





The 'Show Paragraph History' option opens a new window which displays the original paragraph text and all comments and changes for the paragraph. The user can choose whether to 'show changes as tracked' or whether any filter applied in the review interface is reflected in the comment window. Additionally, the Owner or Author can re-open comments or changes from here (if available). The paragraph history window is shown below:

Paragraph history for ID 3  Show changes as tracked  Apply filter

**Original Text**

Security is truly a multilayered process. After an assessment is completed, policies will fall quickly in place because it will be much easier for the organization to determine security policies based on what has been deemed most important from the risk assessments.

	<b>Zoe Wright</b> 13 Oct 2016 1:54 PM	Category: Minor Accepted by: Zoe Wright 13 Oct 2016 1:54 PM	<a href="#">Re-Open</a>	#56
Security is truly a multilayered <del>process</del> . After an assessment is completed, policies will fall quickly in place because it will be much easier for the organization to determine security policies based on what has been deemed most important from the risk assessments. <a href="#">new text - merged and accepted</a> Created by merging other changes together				
	<b>Zoe Wright</b> 13 Oct 2016 1:54 PM	Category: Minor Merged by: Zoe Wright 13 Oct 2016 1:54 PM Reason: This change was merged into another one		#54
Security is truly a multilayered process. After an assessment is completed, policies will fall quickly in place because it will be much easier for the organization to determine security policies based on what has been deemed most important from the risk assessments. <a href="#">new text - merged and accepted</a>				
	<b>Zoe Wright</b> 13 Oct 2016 1:54 PM	Category: Minor Merged by: Zoe Wright 13 Oct 2016 1:54 PM Reason: This change was merged into another one		#55
Security is truly a multilayered <del>process</del> . After an assessment is completed, policies will fall quickly in place because it will be much easier for the organization to determine security policies based on what has been deemed most important from the risk assessments.				
	<b>Zoe Wright</b> 6 Oct 2016 1:17 PM	Category: Minor Merged by: Zoe Wright 6 Oct 2016 1:21 PM Reason: This change was merged into another one		#4
Security is truly a multilayered process. After an assessment is completed, policies will fall quickly in place because it will be much easier for the organization to determine security policies based on what has been deemed most important from the risk assessments. <a href="#">Add some text here</a>				
	<b>Zoe Wright</b> 6 Oct 2016 12:56 PM	Category: Minor Merged by: Zoe Wright 6 Oct 2016 1:21 PM Reason: This change was merged into another one		#1
<del>Security is truly a multilayered process</del> . After an assessment is completed, policies will fall quickly in place because it will be much easier for the organization to determine security policies based on what has been deemed most important from the risk assessments.				

## Accepting and closing comments and changes

Authors and review Owners can now accept non-conflicting changes on a paragraph on a one by one basis. So this means that they can accept a single proposed change on a paragraph, while leaving other proposed changes open.

There are three ways to accept and close comments and changes:

- 1 Using the PleaseReview toolbar icons;
- 2 Using the quick accept/close icons;
- 3 Using the actions menu.



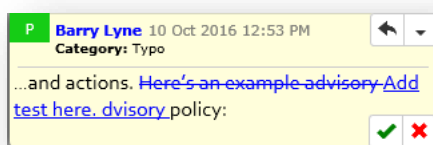
## PleaseReview toolbar icons



These toolbar icons allow the user to accept or close comments and changes. The user can set the 'Accept' and 'Close' icon to prompt (or not prompt) for a reason. Using these icons carries out the action of 'Accept' or 'Close' and moves to the next open comment or change. This makes it quicker to move through open comments and changes, based on the filter applied.

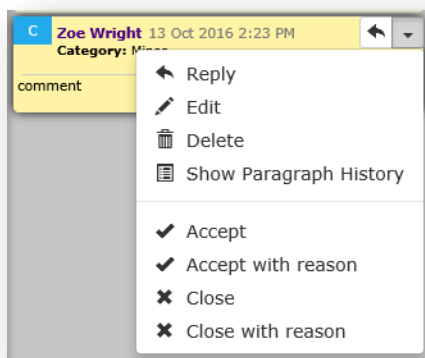
## Quick accept and close

The quick accept and close options can be seen in the bottom right corner when the user hovers over or selects a comment or change. Whether the user is prompted to give a reason when using the quick accept and close depends on their user setting. This works in the same way as in previous versions, where the user can set their preference to 'Always', 'Never' or 'Close only'. The quick accept (✓) and close (✗) options can be seen below:



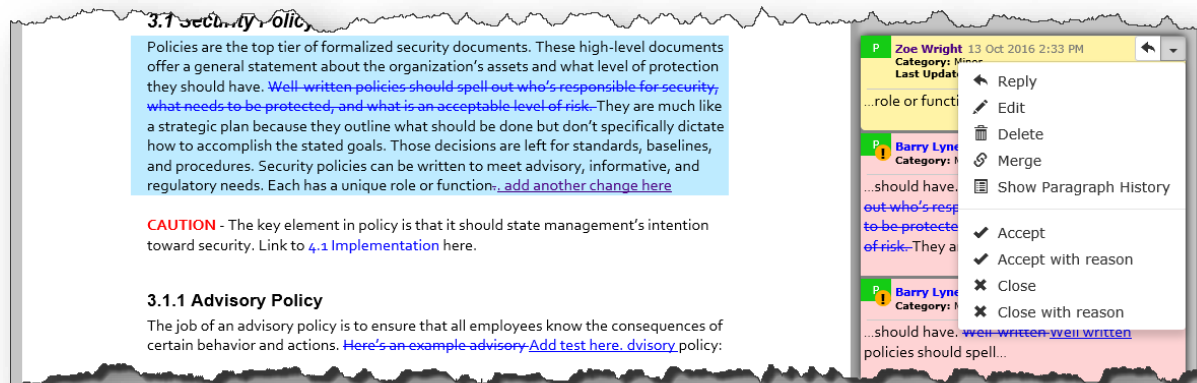
## The actions menu

The actions menu provides the option to accept or close a comment, either with or without being prompted for a reason. This is shown below:

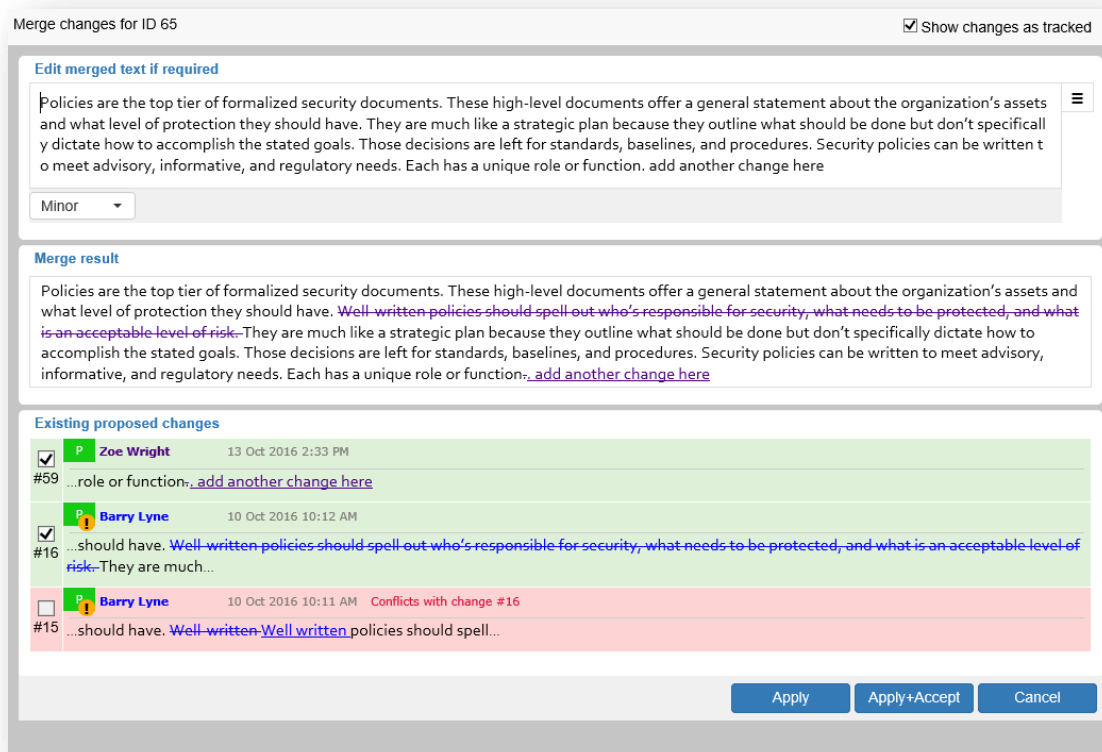




Additionally, the 'Merge' option is available, when there is more than one open proposed change on a paragraph. This is shown below:



Selecting the merge option presents the merge window, which should be familiar to existing PleaseReview users. The merge window has some visual enhancements to help identify and provide information on conflicting proposed changes, but its functionality remains unchanged.





## New merge status

To improve summary reporting of comments and changes the new status 'Merged' is displayed. When the merge action is used to merge all open changes on a paragraph, their status is now recorded as 'Merged', rather than 'Closed'. This allows for better reporting of the number of comments and changes that were incorporated into the final document.

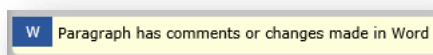
If it is important to report on the number of comments and changes made by status, it should be pointed out that all open changes merged via the actions menu will be recorded as merged - regardless of whether or not they were incorporated into the document. To avoid this, there is the option to accept non conflicting changes on a one by one basis, close unwanted changes and then merge those that may need to be revised or are conflicting.

The comment summary with the merge status is reflected in the review control panel as shown below:

Document	Type	Open	Accepted	Merged	Closed	Withdrawn
Notes on V6.docx	FDBK	0	0	0	0	0
1 - Sample policy document-for demo.docx		14	6	12	0	0
bbc.pdf		7	1	0	1	0

## Improved handling of Microsoft Word comments and tracked changes

Previously we have recommended that Microsoft Word documents with tracked changes should not be uploaded into PleaseReview. However we appreciate that isn't always possible, and have included an enhancement to display a notification to indicate those paragraphs which contain Microsoft Word comments and/or tracked changes:



It is important to note that although they will be visible in the document, they will not be included as PleaseReview comments and/or proposed changes, but merely visible as existing document mark-up. If you click on the paragraph they will not be displayed in the inline editor as tracked changes, but appear as accepted text. Once a change is applied to a paragraph they are no longer displayed, however the indicator (shown above) remains. It is then possible to see the Microsoft Word tracked changes in the paragraph history window under 'Original Text'.

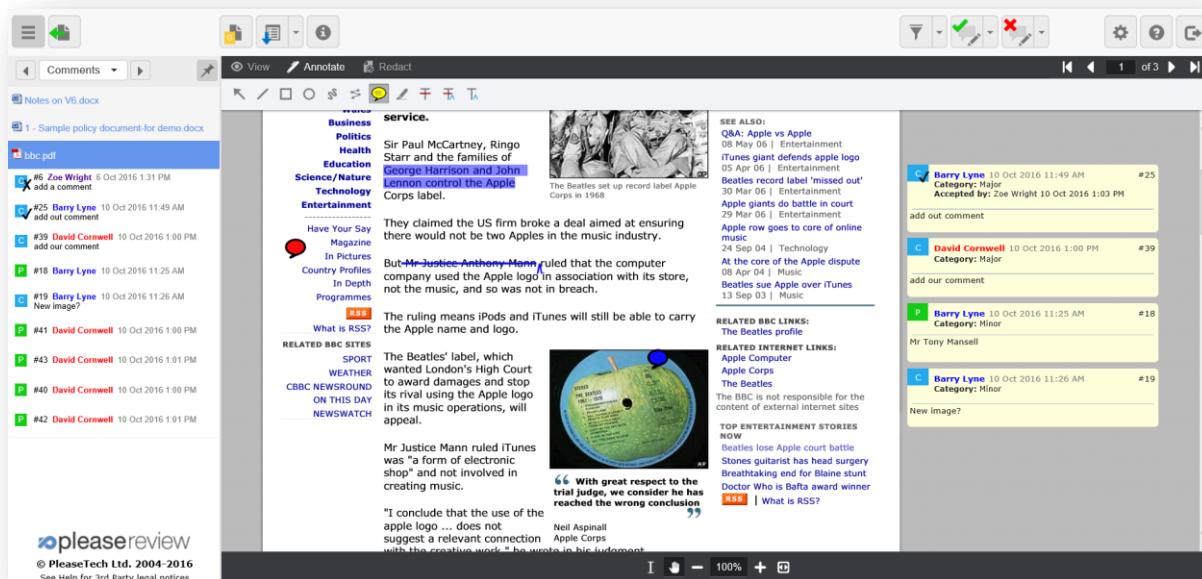
All other behavior remains unchanged.

## Reviewing PDF documents

PDFs are presented in the new review interface (as opposed to the classic interface).

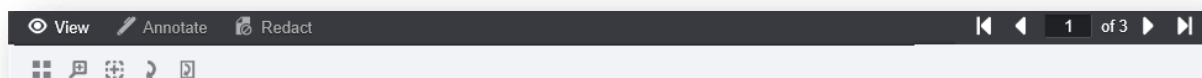


There is now the full annotation experience within the browser, without the need for any additional software or client plugin. An overview of this interface is shown below:



## Navigation

The navigation is still located on the left hand side of the review interface with options to show/hide the navigation as before, along with the ability to pin the navigation pane. The user can also navigate the PDF by pages from the top right of the PDF toolbar. From this toolbar there is the option to pan, zoom or rotate the document, by selecting the 'View' option, as shown below:



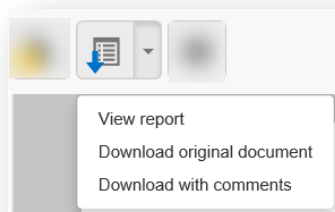
## The PleaseReview toolbar

The toolbar has been rationalized, along with some new and updated icons, as shown below:





In order to simplify the presentation, some toolbar icons have been grouped and replaced with a single icon with options provided in its drop down list. For example, the new 'Download and reporting' icon provides access to the reconciliation report and document downloads. Shown below are the options available in the drop down list:



The updated and enhanced filter option allows the user to filter by open comments or use the custom filter.

By default, no filter is applied. In this instance all comments are displayed in the navigation pane and document display. The icon appears as shown below:



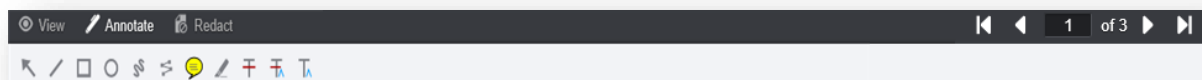
If the user selects to display 'Open' comments only or apply a 'Custom filter', then only open comments or those selected in the custom filter will appear alongside the document and in the navigation. The icon will change to indicate a filter is being applied. This is shown below:



The user is also be able to toggle the filter on and off.

## Making comments and proposing changes

Making comments and proposing changes can be done using one of the many annotation tools available. The user can do this by selecting the 'Annotate' option on the PDF toolbar.





The user can make a comment using any of the drawing tools, sticky note or text highlighter. Simply select the required tool and apply to the relevant part of document. Add a comment and select a category before applying. The commenting tools are shown below:

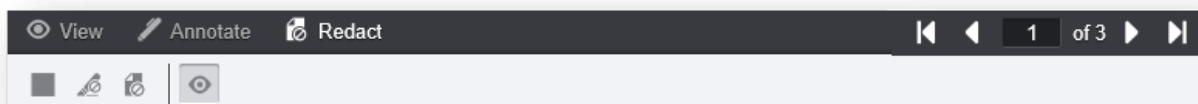


The user can propose a change to a PDF using the replace text, insert text and delete text options. Again, simply select the required tool and apply to relevant text within the document. Add a comment (if required) and select a category before applying. The proposed change tools are shown below:

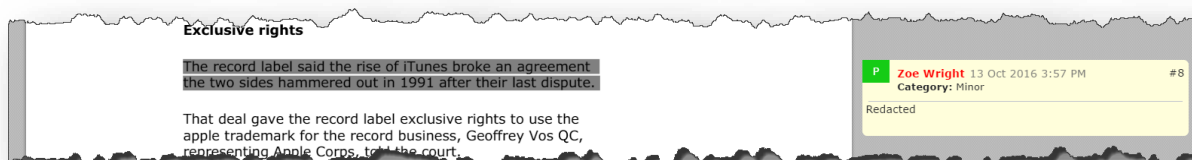


## Redacting a PDF

Redacting a document can be done using one of the redaction tools available. The user can do this by selecting the 'Redact' option on the PDF toolbar:



When a redaction is applied, it appears as a proposed change, in the same way as deleting, inserting or replacing text:



Additionally, when downloading a document with redactions the user can select whether they are fully redacted or downloaded as 'marked for redaction'. By default, open and accepted redactions are applied as redactions to the downloaded PDF, and it is not possible to see the underlying content of the redaction. This is shown below:

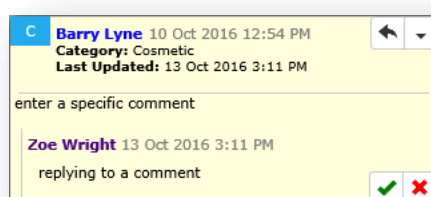


It is also possible to 'Export redactions as PDF redaction marks (redacted content still visible)', which will mean that the underlying content will be visible in the downloaded PDF, and can then be worked on further outside PleaseReview, before the redactions are applied. In this instance when a user hovers over a redaction mark in the PDF, the underlying content is displayed.



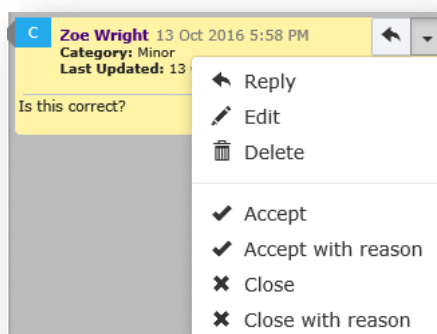
## Replying to comments

The reply option (↩) is located on the top right of a comment or change. To reply, the user simply clicks the icon on the relevant comment or change, and adds a comment before applying. The ability to reply to both the original comment or change or any reply within a discussion thread remains unchanged. The reply option can be seen below:



## Actions menu

The actions available to each user for a comment or change can be found under the action menu (▼). This is located in the top right corner of a comment or change. The actions menu includes actions previously available and some new options. Those actions that were previously available to a user have not changed (i.e. reply, edit, delete), and are still based on the comment status, user's role and whether or not the comment or change was made by the user.



## Accepting and closing comments and changes

Authors and review Owners can now accept and close comments and changes in three ways. These are:

1. Using the PleaseReview toolbar icons;
2. Using the quick accept/close icons;
3. Using the actions menu.

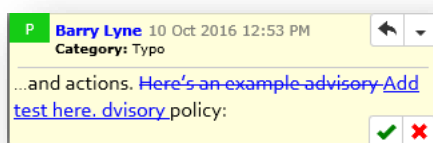
### The PleaseReview toolbar icons

The toolbar icons allows a user to accept or close comments and changes. The user can set the 'Accept' and 'Close' icon to prompt or not prompt for a reason. Using these icons carries out the action of 'Accept' or 'Close' and moves to the next open comment or change. This allows you to move quickly through open comments and changes, based on the filter applied. These icons are shown below:



### Quick accept and close

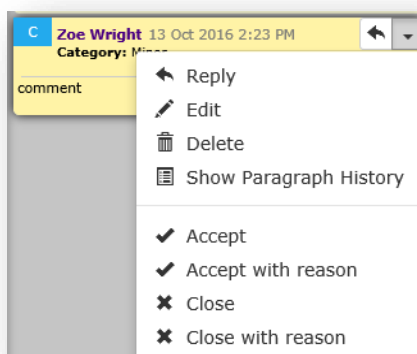
The quick accept and close options can be seen in the bottom right corner when the user hovers over or select a comment or change. Whether a user is prompted to give a reason when using the quick accept and close will be dependent on their user setting. This works in the same way as previously, where a user can set their user setting to 'Always', 'Never' or 'Close only'. The quick accept (✓) and close (✗) options can be seen below:





### From the actions menu

The actions menu provides the option to accept or close a comment, either with or without being prompted for a reason. This is shown below:



## Review set up

Enhancements have been made to the review set up process.

### Enhancements to 'upload documents'

When uploading documents a user now has the option to select multiple documents and drag and drop those documents into the review. Once attached to the review, it is simple to change the document type to 'Reference' or 'Feedback' or re-order the documents. An overview is shown below:

**new review step 2: upload documents**

documents already attached to this review:

Title	Type	Status	
1 - Sample policy document-for demo.docx	Review	Preparing	✕
Demo PDF document.pdf	Review	Preparing	✕

Drag your document(s) onto this box to upload or click here for the upload dialog

Advanced Options

[Previous](#) [Next](#)



## Enhancements to 'specify participants'

The interface for adding participants to a review has been made more intuitive to email users. It is now easy to search for users by typing and selected from the auto-suggested list, and a user can copy bulk email lists of users from other sources such as Microsoft Outlook or Gmail - they will be added to the review if they exist as PleaseReview users.

By default, a box appears to add reviewers. Additional options appear to add participants with other roles where you can choose to add roles. An overview is shown below:

**new review step 3: specify participants**

**add new participants** [Show members](#)

Reviewer:   |

Add roles: [Author](#) [Contributor](#) [Other roles](#) [Distribution Lists](#)

**participants already included on this review:**

Name	Email	Role	Details	Participant
Zoe Wright	Zoe.wright@PleaseTech.com	Owner	<a href="#">Edit</a>	<a href="#">Remove</a>

[Change workgroup](#) [Manage distribution lists](#) [Add users](#)

When selecting a distribution list, participants are now automatically added to the review. This is a change in behavior from previous versions of PleaseReview, where a distribution list was presented and the review Owner had the option to select some, or all the participants before adding those participants to the review.



**add new participants** Show members

Reviewer:

Author:

Add roles: **Contributor** **Other roles** ▾ **Distribution Lists** ▾

Regulatory Team

Add

**add new participants** Show members

Reviewer:

Author:

Add roles: **Contributor** **Other roles** ▾ **Distribution Lists** ▾

Add

Once added to the review, it is simple to remove a participant by clicking the 'X' or pressing backspace. To move a participant to another role simply drag and drop their name. The process for creating and editing distribution lists remains unchanged.

For more information, please contact your account manager or email [sales@pleastech.com](mailto:sales@pleastech.com)