

# PleaseReview v6.4 guide to accepting and closing comments and changes

This quick guide provides an overview of accepting and closing comments and changes in PleaseReview.

## Overview

Participants with the role of Author or Owner in a review are able to accept and close comments and proposed changes. This can be done when the review is 'In Progress' or after it has been 'Closed', but not when the review is 'Completed'.

There are three different ways an Author/Owner can accept and close individual comments and proposed changes on a one by one basis as described in this guide.

## Accepting and closing using the toolbar

The 'Accept' and 'Close' icons on the PleaseReview toolbar can be used to quickly accept/close comments and proposed changes and move to the next open comment or change in the review.

The Author/Owner should first set their preference to prompt for a reason or not using the options available from the icons:

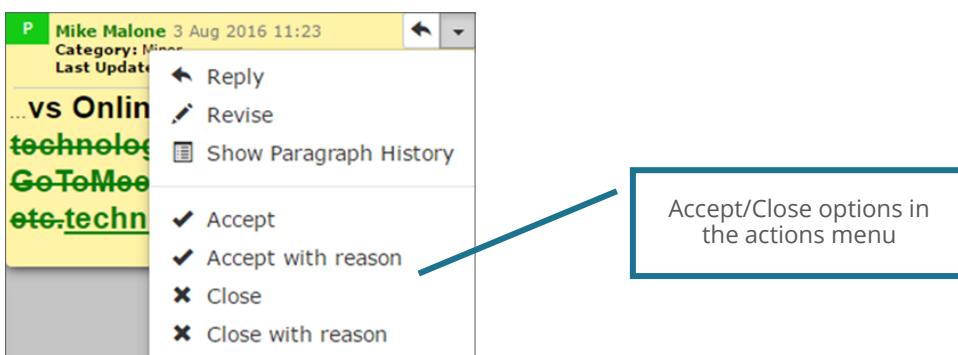
Accept icon and options	Close icon and options	
		
<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Accept without reason and move to next</li> <li><input checked="" type="checkbox"/> Accept with reason and move to next</li> <li><input checked="" type="checkbox"/> Accept all</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Close without reason and move to next</li> <li><input checked="" type="checkbox"/> Close with reason and move to next</li> <li><input checked="" type="checkbox"/> Close all</li> </ul>	
		<b>Accept/Close without reason and move to next</b> Accept/close the comment/change and move to the next open comment or change without being prompted to give a reason.
		<b>Accept/Close with reason and move to next</b> Accept/close the comment/change, enter a reason and move to the next open comment or change.

The Author/Owner can then simply click either the 'Accept' or 'Close' icon on the toolbar for each comment/change in the review. As soon as a comment/change has been accepted/closed, PleaseReview will automatically jump to the next open comment/change in the review.

## Accepting and closing using the actions menu

The actions menu displayed on each open comment/proposed change also provides the Author/Owner with the ability to accept/close, either with or without giving a reason.

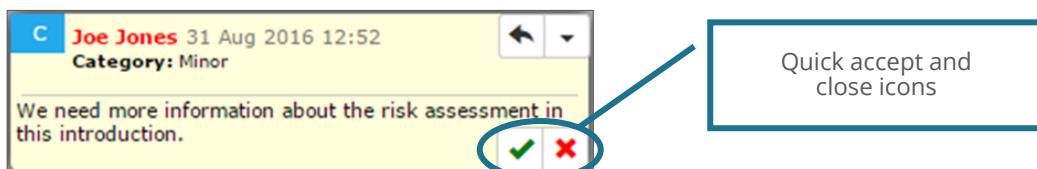
The actions menu drop-down list can be seen in the top right corner by hovering over or selecting the comment/change:



## Accepting and closing using the quick accept and close icons

The 'Quick Accept' and 'Quick Close' icons displayed on each open comment/proposed change can be used to quickly accept/close comments and proposed changes in the review.

The quick accept and close icons can be seen in the bottom right corner by hovering over or selecting the comment/change:



## Give reason

If enabled, the default settings for the Author/Owner to accept or close a comment/change 'with reason', or 'without reason' can be set using the User Settings icon on the toolbar.

These options include:

Always	=	Always prompted to give a reason.
Never	=	Never prompted to give a reason.
Close Only	=	Only prompted to give a reason when closing.

Where the Author/Owner select an option to accept or close a comment/proposed change with a reason, a new window will open which allows the Author/Owner to select a reason from the drop-down list and enter additional notes if required.

## Conflicting changes (Word documents only)

If there are conflicting proposed changes on a paragraph, the comment will be shaded red and a warning icon will display.

In this instance, a 'Merge' option will be available on the actions menu. The 'Merge' option can also be used to accept multiple changes on a paragraph.

Selecting 'Merge' opens the merge window:

The merge result includes all selected proposed changes. Additional edits can be made here.

Merge changes for ID 7  Show changes as tracked

**Edit merged text if required**

Before these policies are finalized, they must be researched to verify that they will be compliant with all federal, state, and local laws. These documents should also clearly state employee responsibilities and implications of noncompliance.

Minor ▾

**Merge result**

Before these documents-policies are locked in as policiesfinalized, they must be researched to verify that they will be compliant with all federal, state, and local laws. These documents should also clearly state what is expected from employees employee responsibilities and what the result implications of noncompliance will be on noncompliance.

**Existing proposed changes**

Author	Last Modified	Comments
 Mike Malone	19 Oct 2016 14:51	... also clearly state what is expected from employees employee responsibilities and what the result implications of noncompliance will be on noncompliance.
 Helen Harris	19 Oct 2016 14:02	Conflicts with change #16 ... is expected from employees all staff and what the...
 Mike Malone	19 Sep 2016 12:56	#12 Before these documents-policies are locked in as policiesfinalized, they must...
 Joe Jones	3 Aug 2016 10:44	Conflicts with change #16 ... is expected from employees employees, contractors, consultants, temporary and other workers, and what the result...
#3		

**Apply** **Apply+Accept** **Cancel**

Tracked changes view of the merge result above

Checked changes are included in the merge result above

The Author/Owner can use the check-boxes to select/deselect the inclusion of proposed changes in the merge and can make further edits.

Clicking the 'Apply' button will apply the changes into a new merged proposed change, attributed to the Author/Owner. This new merged proposed change can then be accepted in the usual way.

## Accepted/Closed comments and changes

Once the Author/Owner has accepted/closed comments and proposed changes, the status of the comment/proposed change is updated and clearly displayed:

When there are accepted, closed or merged comments/changes on a paragraph a single information comment is displayed. The 'Show Paragraph History' option will be available from the actions drop-down menu to see more detail.

The option to 'Re-Open' an accepted/closed comment or change will also be available from the actions drop-down menu.

C ✓ Joe Jones 21 Sep 2016 10:05 Accepted by: Helen Harris 19 Oct 2016 13:07 #6

Authorized dosage form

C X Joe Jones 31 Aug 2016 12:52 Category: M Closed by: I Reason: This policy. I will Show Paragraph History C Re-Open

We need more information about the risk assessment in this introduction.