

PleaseReview v6.4 guide to OpenSpace reviews

This quick guide provides an overview of using PleaseReview to create an OpenSpace review.

Overview

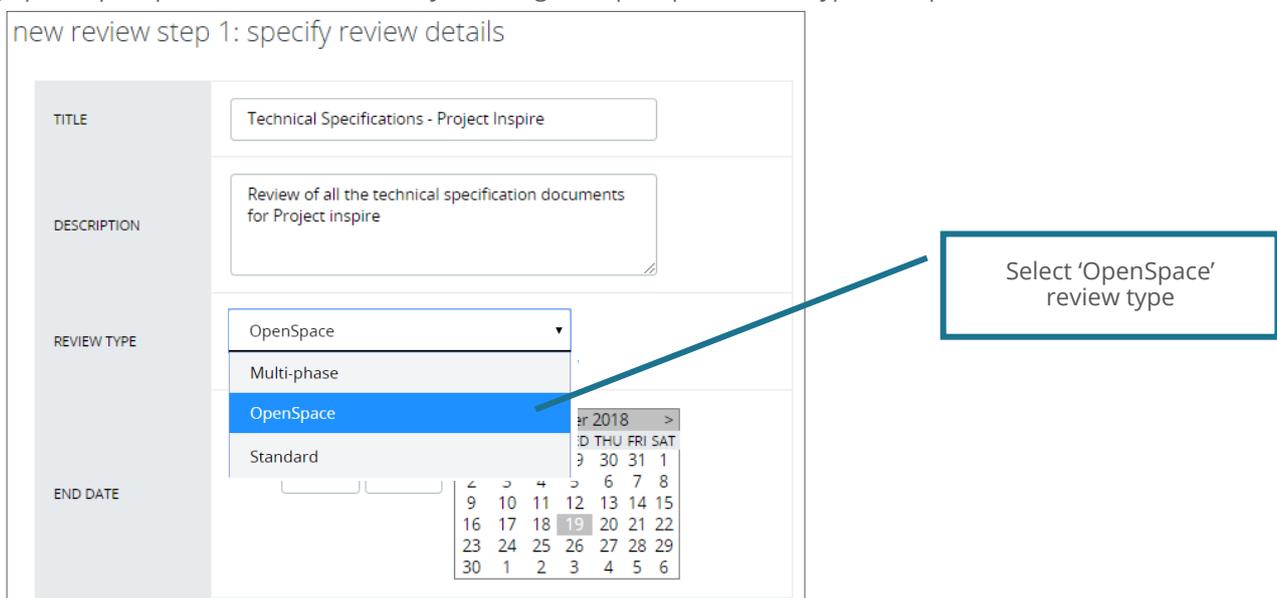
PleaseReview OpenSpace provides the ability to create a co-authoring session in Microsoft SharePoint. This is particularly useful in the pre-review stage, where a team of participants are developing the document content and wish to work in an uncontrolled environment with full Microsoft Word capabilities prior to the document moving into a controlled review cycle.

This has several advantages and consequences:

- Participants of the review use Microsoft Word to co-author the document and can access all their usual Word plugins;
- Unlike the usual PleaseReview environment, an OpenSpace review is uncontrolled and therefore contributions to the document can be edited and/or removed by other participants without an audit trail of the activity.

OpenSpace review set up

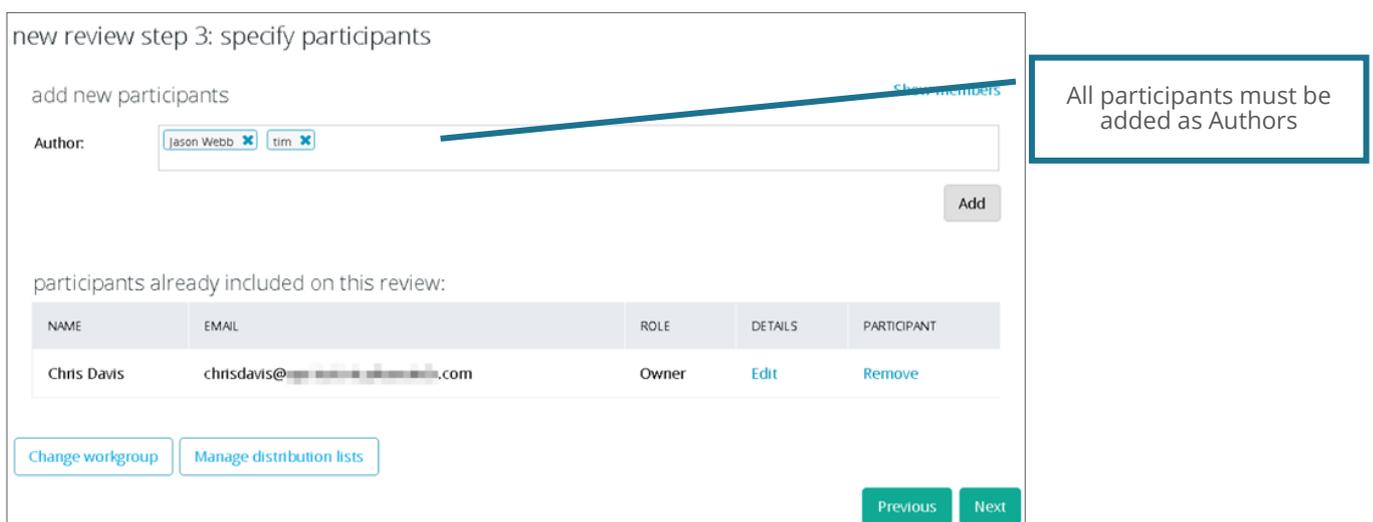
Setting up an OpenSpace review is enabled by selecting the OpenSpace review type at step 1 of the new review wizard:



The screenshot shows the 'new review step 1: specify review details' form. The 'REVIEW TYPE' dropdown menu is open, showing options: 'OpenSpace', 'Multi-phase', 'OpenSpace', and 'Standard'. The 'OpenSpace' option is highlighted in blue. A callout box with a blue border and white background contains the text 'Select 'OpenSpace' review type' with a blue arrow pointing to the highlighted 'OpenSpace' option. Other fields include 'TITLE' (Technical Specifications - Project Inspire), 'DESCRIPTION' (Review of all the technical specification documents for Project inspire), and 'END DATE' (a calendar for April 2018).

At step 2, documents are uploaded to the review in the usual way. Note that the 'Advanced Options' link at the bottom of the screen allows two options to restrict editing in Word documents of an OpenSpace review.

At Step 3, participants are added to the review in the usual way. Note, however, that all participants must be added to the review as an Author:



The screenshot shows the 'new review step 3: specify participants' form. The 'add new participants' section has an 'Author:' label and a text input field containing 'jason Webb' and 'tim'. An 'Add' button is to the right. Below this is a table for 'participants already included on this review:'. The table has columns: NAME, EMAIL, ROLE, DETAILS, PARTICIPANT. One participant is listed: Chris Davis, email chritsdavis@...com, role Owner, with 'Edit' and 'Remove' links. At the bottom are buttons for 'Change workgroup', 'Manage distribution lists', 'Previous', and 'Next'. A callout box with a blue border and white background contains the text 'All participants must be added as Authors' with a blue arrow pointing to the 'Author:' label.

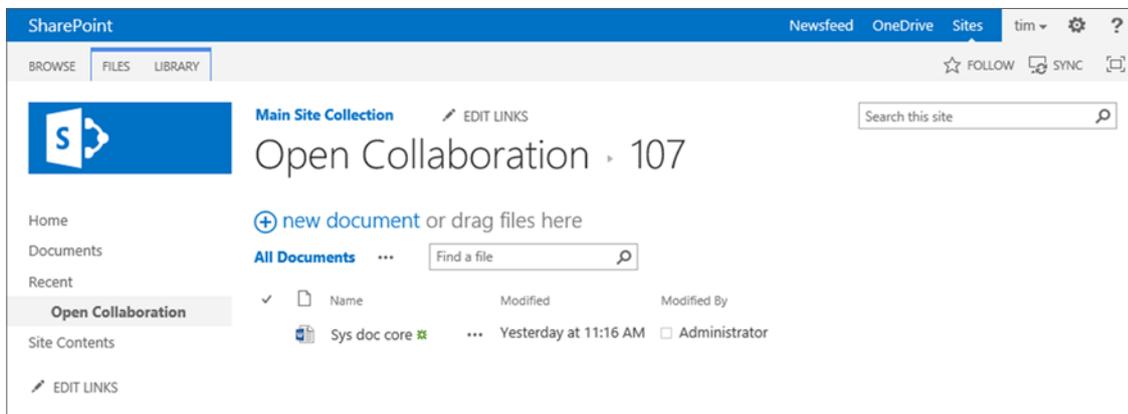
The remainder of the set-up process is the same as a standard review, however by default, most review options are not available for OpenSpace reviews.

The OpenSpace review environment

Participants of an OpenSpace review can enter the review in the usual way, by selecting the 'Enter' link from the PleaseReview home screen or the Review Control Panel. Either method will open the SharePoint environment in a second tab in the browser.

Note that you must ensure your browser popup blocker allows access to the SharePoint site.

Click on the link in the SharePoint environment to open and edit the document:



Once complete, save and close the document.

Upon leaving the OpenSpace session, the usual 'Update Status' screen in PleaseReview will display.

OpenSpace review closeout

A review Owner can closeout an OpenSpace review in the usual way via the Review Control Panel.

Once completed, the review Owner has the ability to download three different versions of the document(s): the original; the latest version; and a comparison of the changes.

review closeout - Requirements and Specifications - Project Innovate

review details

TITLE	Requirements and Specifications - Project Innovate
DESCRIPTION	Review of requirements and technical specifications for project 'Innovate'
STATUS	Completed (16 Aug 2018 5:06 PM)
END DATE	29 Oct 2018 11:45 PM

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 Sysdoc - INSPIRE.docx	Sysdoc - INSPIRE.docx	Download	Download	Download

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Note that upon closing the review, the document(s) are removed from SharePoint and all permissions revoked.