

# PleaseReview v6.4 guide to roles

This quick guide provides an overview of the workgroup roles and review roles available in PleaseReview.

## Overview

It is important to differentiate between the workgroup role and the review role. When PleaseReview users are initially set up on the system, they must be assigned a workgroup role. This workgroup role is a maximum setting and may be overridden for each review. The review owner will determine each user's review role (i.e. their privileges in that specific review) when setting up the review.

## PleaseReview reviewer roles

If a user has the workgroup role of Reviewer they can be assigned the role of Reviewer or Viewer within a review.

There can be multiple Reviewers and Viewers in each review. An overview of these roles and the tasks they can carry out within a review is shown below.

Role holder can:	Viewer	Reviewer
View the documents in the review <sup>1</sup>	✓	✓
View all associated comments, proposed changes and replies	✓	✓
Add comments		✓
Make proposed changes (dependant on document type)		✓
Reply to comments and proposed changes made by other participants		✓

<sup>1</sup> When using zones, an Owner can restrict participants who are Reviewers to be Viewers on specific areas of the document, or for specific areas of a document to be hidden.

## PleaseReview author roles

If the user's workgroup role is Author, the user automatically has privileges to create and manage reviews in that workgroup. Additionally, the Author role means that the user may be added to reviews they do not own in the role of Reviewer, Viewer or Author.

If a user has the workgroup role of Author they can create a review which, by default, will give them the role of Owner.

The review Owner automatically has Author permissions and can appoint additional Authors in the review. There can be multiple Authors in each review but there can only be one Owner per review. An overview of these roles and the tasks they can carry out within a review is shown below.

Role holder can:	Owner	Author
Do everything a Reviewer can	✓	✓
Create a review	✓	
Close and complete the review	✓	
Transfer ownership of the review	✓	
Accept/close comments and proposed changes made by other participants	✓	✓
Assign zones to Reviewers (make areas read-only or hidden to some/all participants)	✓	
Assign zones to other contributors	✓	

## PleaseReview contributor roles

If the user's workgroup role is Contributor, the user may be added to reviews they do not own in the role of Reviewer, Viewer or Contributor.

Contributors are review participants who are also able to edit an allocated part of a Word document using Microsoft Word itself. The Contributor role is, therefore, only valid when a Word document is included in the review.

If a user's workgroup role is Author-Contributor, the user automatically has privileges to create and manage reviews. Additionally, the combination of both Author and Contributor roles means that:

- (i) the user may be added to reviews they don't own in the role of Reviewer, Viewer, Author or Contributor, and
- (ii) the user may be added to reviews they do not own in the role of Author-Contributor or Super-Contributor.

There can be multiple Contributors in each review. An overview of these roles and the tasks they can carry out within a review is shown below.

Role holder can:	Contributor	Author-Contributor	Super-Contributor	Owner-Contributor (only available to review owners)
Do everything a Reviewer can	✓	✓	✓	✓
Do everything an Author can		✓	✓	
Do everything an Owner can				✓
Be assigned an edit-in-Word zone	✓	✓	✓	✓
Assign an edit-in-Word zone to themselves			✓	✓

## PleaseReview workgroup roles

Dependant on the roles required within reviews, users should be assigned the relevant workgroup role:

- Reviewer
- Contributor (includes Reviewer roles)
- Author (includes Reviewer roles)
- Author-Contributor

Additionally, Workgroup Administrator, Monitor and Managerial Delegation can be added to a Workgroup role.

**Workgroup Administrator** This is an ancillary administration role. Depending on the system configuration settings, the Workgroup Administrator can set up workgroup distribution lists, add users to the workgroup and manage workgroups, such as transfer of review ownership.

**Monitor** This is an ancillary oversight role. Monitors may enter any review in their workgroup(s) as a Viewer which allows QA / management oversight of the review process.

**Managerial Delegation** This is a managerial delegation role set at a workgroup level. It allows the user to add one or more additional Reviewers into a review whilst remaining active in the review themselves.  
Note, this is separate from the standard "simple delegation" which does not require any specific privileges.

Note: Administrator Only and Monitor can also be distinct roles.