

PleaseReview

Version 6.1

Oracle Documents Cloud
Integration User Manual





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1 Introduction

This document is provided as a reference source for users of the PleaseReview Oracle Documents Cloud integration.

Before reading this user manual, please be aware of the following:

- This document refers only to the integration of PleaseReview and Oracle Documents Cloud and addresses PleaseReview actions when initiated through the Oracle Documents Cloud interface. Familiarity with the Oracle Documents Cloud interface and functionality is assumed. In principle, the standard PleaseReview functionality is simply reflected through the Oracle Documents Cloud User Interface (UI).
- PleaseReview has a number of system configuration settings which allows the System Administrator to control the behavior of certain aspects of PleaseReview by making specific features available or not. This manual has been written based on the default settings, and as such the descriptions and images may differ slightly to the appearance of your environment of the PleaseReview Oracle Documents Cloud integration.
- The PleaseReview V6.1 review interface is supported on all mobile devices.
- The PleaseReview application isn't available within the Oracle Documents App.
- **Please read the Important Notes section before using PleaseReview Oracle Documents Cloud for the first time.**



1.1 Overview of the System

PleaseReview is designed to facilitate the collaborative review, co-authoring and redaction of documents.

The application is designed around document reviews. An Owner initiates a review and invites participants to review, co-author and/or redact their document(s). These participants receive an email invitation to the review and it appears on their personal review list.

During the review, participants can undertake activities according to their role permissions and the parameters set by the review Owner.

At the end of the review the Owner can download the document(s) containing the selected changes and comments as well as a comprehensive reconciliation report detailing all activity on the review. The Owner can then complete the review and upload a new version of the document(s) to Oracle Documents Cloud.

In addition to single stage collaborative reviews, PleaseReview also supports:

- Independent reviews - Participants do not see each other's' comments and proposed changes. In fact, they are not even aware that there are other participants in the review. The Author/Owner however, sees all participants' comments and proposed changes. By definition, an independent review removes features which allow participants to collaborate;
- Subteams - Participants in a Subteam only see each other's' comments and proposed changes. The Owner and any Authors in the review however see all participants' comments and proposed changes from all Subteams;
- ReviewFlow™ - Provides additional flexible review workflows with options for sequential, multi-phase reviews in which each phase may be collaborative or independent.



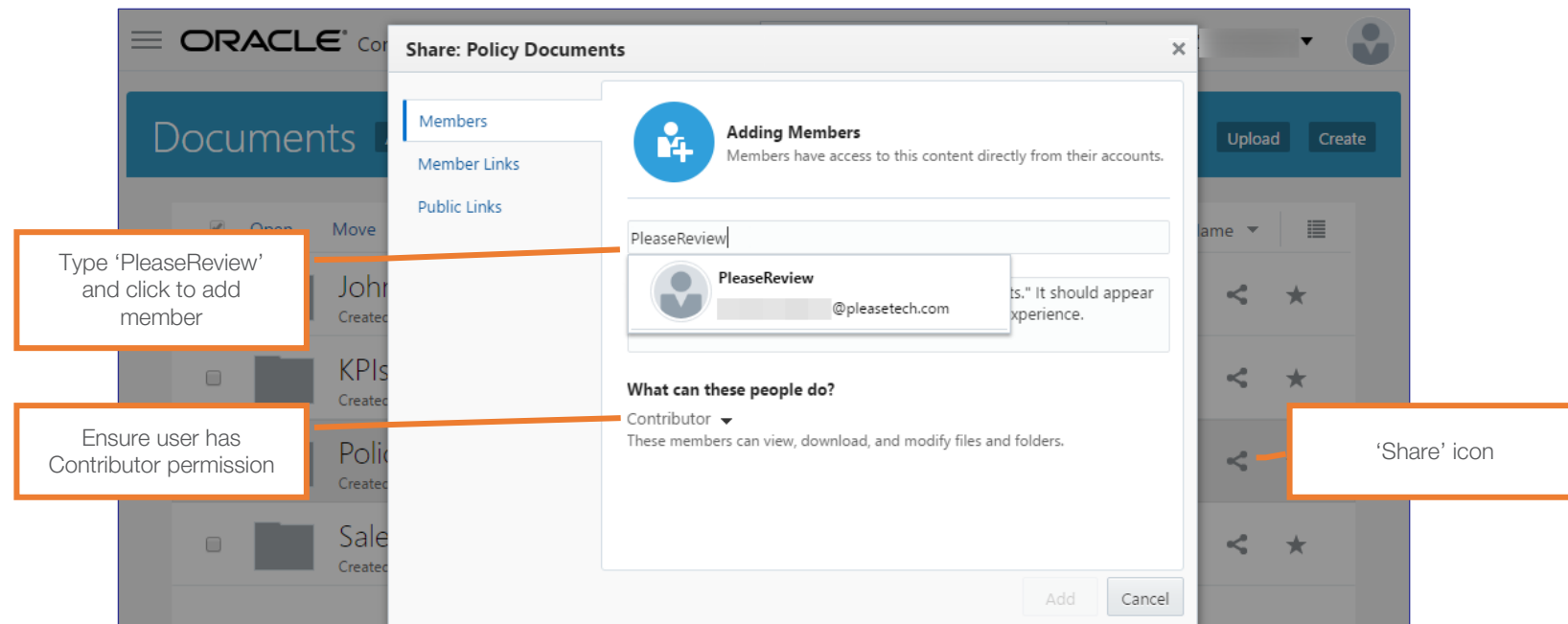
1.2 Important Note

Before using PleaseReview Oracle Documents Cloud, it is important to ensure that all folders set up in Oracle Documents Cloud are shared with the member 'PleaseReview' with the permission of 'Contributor'. This member account will be created by the System Administrator.

Failure to set up and use the 'PleaseReview' user will result in unexpected behavior within PleaseReview and Oracle Documents Cloud.

1.2.1 Sharing Folders with the 'PleaseReview' Member

To share folders with the member 'PleaseReview', browse to the relevant folder in Oracle Documents Cloud and click the 'Share' icon. In the Share dialog box, select 'Members' and 'Add Members':





1.3 Review Interfaces

In PleaseReview 6.1 Microsoft Word and PDF documents will be presented in the new review interface by default. This interface has been designed to be intuitive to users and work on all devices. It is possible to have PleaseReview 6.1 configured to present the new review interface or the classic interface. The classic interface being the interface familiar to users of PleaseReview 5.x. Within this user manual Microsoft Word and PDF document review is covered for both the new review interface and the classic interface.

It is important to note that when reviewing Microsoft Word documents in the new review interface, PleaseReview 6.1 does not currently support certain toolbar features. These are still available when using the classic interface, and it is possible to switch between the new review interface and classic interface. Additionally, if you are using specific advanced features of PleaseReview, such as ReviewZones or EditZones within a review, the review will automatically be presented in the classic interface. More information on review interface options can be found in the PleaseReview v6.1 Review Interface Configuration Options document.

1.4 Document Formats

Co-authoring - the collaborative editing (co-authoring) features of PleaseReview work specifically with Microsoft Word.

Review - for the review of documents, PleaseReview is designed to work directly with Microsoft Word, Microsoft Excel, Rich Text Format, Microsoft PowerPoint and PDF documents as well as images, plain text files and various software code modules.

For these directly supported document types it is possible to comment on individual words, cells, paragraphs and image locations. The exact granularity of commenting depends on the document format itself.

Note: .ZIP and .TIF files are not supported in the Oracle Documents Cloud integration.

1.5 Other Information Sources

This document is pertinent to the Oracle Documents Cloud integration only. PleaseReview makes extensive use of 'Tool tips'. If in doubt, hover the mouse over the link or command for further information.



1.6 System Policy

PleaseReview has a system policy which allows the System Administrator to specify the behavior and make available/unavailable certain PleaseReview features. Thus, if a feature is discussed (if available) this means that it may not appear on your system as the functionality may be turned off.



2 Roles

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. See [Workgroups](#) for more information.

There are several main roles in PleaseReview and individuals can be allocated different roles (or a combination of roles) in different Workgroups.

2.1 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 in the table:

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

¹ When using ReviewZones, 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.



2.2 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 in the table:

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 ReviewZones to Reviewers (make areas read-only or hidden to some/all participants)	✓	
Assign EditZones to other contributors	✓	
Complete an EditZone	✓	



2.3 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 (EditZone) 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 in the table:

	Contributor	Author-Contributor	Super-Contributor	Owner-Contributor (Only available to review Owners)
Role holder can:				
Do everything a Reviewer can	✓	✓	✓	✓
Do everything an Author can		✓	✓	
Do everything an Owner can				✓
Assign EditZones to themselves			✓	✓
Be assigned an EditZone	✓	✓	✓	✓
Complete an EditZone		✓	✓	✓



2.3.1 Super-Contributor Role

A Super-Contributor has the permissions of an Author and Contributor combined within a review. So are able to accept and close comments made by any participant and have EditZones assigned to them by the review Owner. The review Owner is automatically a Super-Contributor if they have an Author-Contributor role in the review.

Super-Contributors are also able to assign EditZones to themselves anywhere in the document (as long as it is available).

2.4 User Types

The PleaseReview System Administrator has the ability to define User Types and select the functionality available for each type. This allows control over the functionality available to each user, depending on the user type allocated to them. Each user can then be categorized as a user type and thus there is control over what functionality is available to them.

Note that the user roles covered in this manual describe their default functionality.



3 Workgroups

A PleaseReview installation may have multiple Workgroups. Workgroups are a logical way to separate different types of reviews. For example, each department within an organization may have a Workgroup, or there could be a Workgroup per client or per project, etc. Each user exists only once in the system but can have different roles in different Workgroups. For example, a user may be a Workgroup Administrator in one Workgroup, a Contributor in another and be limited to a Reviewer in further Workgroups. In such cases, users are only counted once for license purposes.

To review a document, a user must be a member of the Workgroup in which the review is taking place and included in the review as a participant.

Care must be taken when considering Workgroup roles against review roles. In order to have a specific role in a review the user must have that role in the Workgroup otherwise the review role cannot be assigned.

Workgroup roles define the possible role the user can have in a review in the specific Workgroup and include:

- Author
- Reviewer
- Contributor
- Viewer
- Monitor

Review roles are the roles assigned to the review participant by the review Owner. In order to become a review Owner the user must have 'Author' permissions in the Workgroup. The review Owner can then assign review roles to other participants based on their Workgroup privileges.



3.1 Workgroup Roles

Dependent 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 undertake Workgroup management 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 (i.e. with 'read only' access). This allows quality assurance or management oversight of the review process.
Delegator	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 that this is separate from the standard 'simple delegation' which does not require any specific privileges.

Additional roles which are variations of the standard ones may be created by the System Administrator, for instance it is possible to create a role with the ability to reply but not add new comments.



3.1.1 The Monitor Role

The monitor role is designed to permit quality assurance (QA) or management oversight of the review process, and is Workgroup-based.

Monitors may enter any review in their Workgroup(s) as a viewer. This is 'read only' access. Monitors are controlled by the System Administrator and will not appear on the review participant list.

Notes:

- A monitor's permissions are restricted to the Workgroup(s) in which they are included;
- There may be many monitors per Workgroup;
- Monitors may not be assigned to Taskgroups. Monitors will be able to automatically locate and monitor a review in a Taskgroup if the review contains at least one participant from a Workgroup in which the monitor has monitor permissions (i.e. a monitored participant). So monitors will be able to monitor a review in a Taskgroup if it contains a monitored participant but will not be able to locate or monitor reviews in a Taskgroup which do not contain a monitored participant;
- It is possible for an individual user to be a standard user (not a monitor) in one Workgroup and a monitor in another Workgroup;
- If a review is an independent review, then the monitor will not be able to see any comments or changes made.

There are two types of monitor:

- 1) Monitors who are not able to be review participants (i.e. not system users);
- 2) Monitors who are able to be review participants (i.e. are system users).

These have the reviews to which they are invited in their inbox as normal. The review search will return all reviews which they are able to see including both reviews to which they are invited and reviews over which they have monitor rights.



3.2 Taskgroups

Taskgroups are a flexible implementation of the more rigid Workgroup model and are designed to allow users from multiple Workgroups to participate in the same review. Taskgroups are designed to be a self-maintaining temporary environment for cross Workgroup collaboration.

Chapter Two

Getting Started

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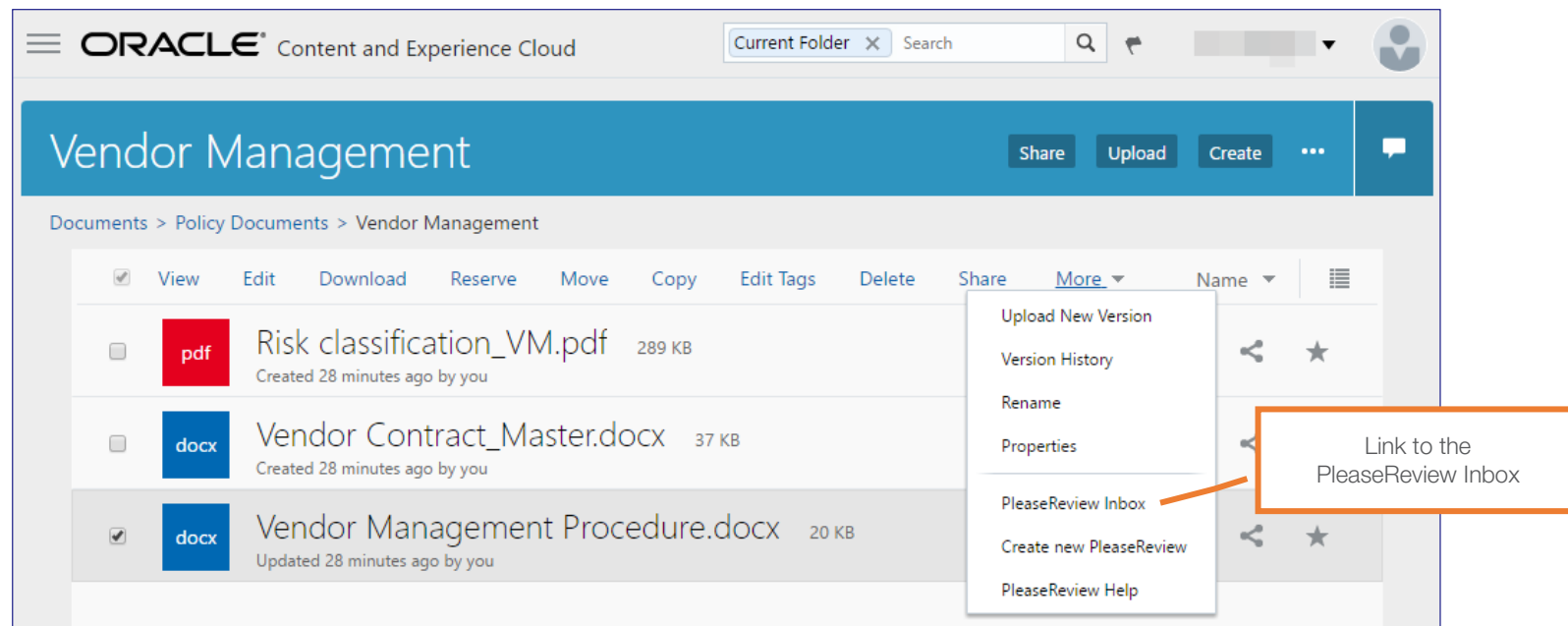




4 The PleaseReview Inbox

The PleaseReview inbox lists all reviews which you have created, and to which you have been invited.

To access the PleaseReview Inbox, select a document or folder in Oracle Documents Cloud and select 'More' from the toolbar menu. Alternatively, the same menu options are available when right-clicking a document or folder:





4.1 My Reviews

The main body of the PleaseReview inbox displays all your reviews:

- The 'Reviews I'm in' tab - a listing of all reviews to which you have been invited to participate.
- The 'Reviews I own' tab - a listing of all reviews you have created (only users with Author permissions will see this tab).

You can filter your list of reviews using the 'My Status' check boxes at the top of the inbox. To sort your list of reviews, click the relevant column heading once to sort the list in ascending order, or twice to sort the list in descending order.

The screenshot shows the 'PleaseReview Inbox' interface. At the top, there's a 'Documents' sidebar and a search bar. The main area is titled 'my reviews' and has tabs for 'Reviews I'm in (2)', 'Reviews I own', 'Search for reviews', and 'Recycle bin'. Below the tabs, there are filter options: 'My status is' with checkboxes for 'Not started', 'In progress', and 'Completed'; and 'Include:' with checkboxes for 'Closed reviews' and 'All workgroups'. A table lists reviews with columns: 'Due Date', 'Title', 'Owner', 'Review Status', 'My Status', 'Details', and 'Review'. Two annotations are present: one pointing to the 'Due Date' column header with the text 'Click column headings to sort reviews', and another pointing to the 'My Status' filter checkboxes with the text 'Check boxes to filter reviews'.

Click column headings to sort reviews

Check boxes to filter reviews

Due Date	Title	Owner	Review Status	My Status	Details	Review
29 May 2017 23:45	Security Policy	Zoe Wright	In Progress	Not Started	Select	Enter
5 May 2017 23:45	Vendor Management Procedure	Zoe Wright	In Progress	Not Started	Select	Enter



4.1.1 Review Status

PleaseReview Inbox ×

my reviews

[Reviews I'm in \(2\)](#) [Reviews I own](#) [Search for reviews](#) [Recycle bin](#)

My status is ☒ Not started ☒ In progress ☐ Completed Include: ☐ Closed reviews ☐ All workgroups

Due Date ▾

Title

Owner

Review Status

My Status

Details

Review

29 May 2017 23:45

Security Policy

Zoe Wright

In Progress

Not Started

Select

Enter

5 May 2017 23:45

Vendor Management Procedure

Zoe Wright

In Progress

Not Started

Select

Enter

[refresh](#)

Review Status	Description
Not Started	The review Owner has not completed the review set up and the review has not started.
On Hold	The review has been placed 'On Hold' by the review Owner and no one can access the review.
In Progress	The review is in progress and visible to all participants.
Overdue	The review is in progress but has passed its due date.
Closed	The review is closed. Participants can access the review as read-only but cannot add comments or propose changes. Review Owners/Authors can continue to accept/close comments.
Completed	The review is complete and read-only to everyone. Once completed, reviews remains with this status until deleted.



4.1.2 My Status

PleaseReview Inbox

my reviews

Reviews I'm in (2) | Reviews I own | Search for reviews | Recycle bin

My status is ☒ Not started ☒ In progress ☐ Completed Include: ☐ Closed reviews ☐ All workgroups

Due Date

29 May 2017 23:45

Title

Security Policy

Owner

Zoe Wright

Review Status

In Progress

My Status

Not Started

Details

Select

Review

Enter

5 May 2017 23:45

Vendor Management Procedure

Zoe Wright

In Progress

Not Started

Select

Enter

refresh

The 'Reviews I'm in' tab displays your personal status in the review.

My Status	Description
Not Started	You have not entered the review yet.
In Progress	You have entered the review, but not completed.
Completed	You have indicated that you have finished the review.
Offline	Reviews that you have downloaded to review offline.



4.1.3 Searching for Reviews

The 'Search for reviews' tab allows you to search for a specific review:

The screenshot shows the 'PleaseReview Inbox' window with the 'my reviews' tab selected. The 'Search for reviews' sub-tab is active. A search bar contains the text 'vendor*' and a 'Go' button. To the right of the search bar are checkboxes for 'Include: Deleted reviews' and 'All workgroups'. Below the search bar is a table of search results. A 'refresh' link is to the right of the table. Below the table is a 'printable view' link. At the bottom, there is a note explaining the search functionality and wildcard usage.

Enter text to search (can use '*' wildcard)

Reviews matching search criteria are listed

Due Date	Review Title	Review Owner	Review Status	Details	Review
5 May 2017 23:45	Vendor Management Procedure	Zoe Wright	In Progress	Select	Enter

The search will return all reviews whose title starts with the value you entered. If you want to search for review titles containing certain characters, use '*' as a wildcard. For instance, entering '*design' will return reviews ending in design; entering '*design*' will bring back all reviews containing design.

The search will return all reviews where the review title starts with the text you entered.

If you want to search for review titles containing certain characters use '*' as a wildcard. For example, entering '*design' will return reviews ending in design; entering '*design*' will return all reviews containing the word design.

Notes:

- You will only be able to search for reviews in which you are a participant. The results will not contain any reviews to which you are not invited;
- The 'Deleted reviews' option will locate those reviews which are in the recycle bin (if enabled). It will not locate reviews which have been permanently deleted.



4.1.4 Recycle Bin

The recycle bin (if available) will list deleted reviews. Deleted reviews will remain in the recycle bin for a system defined period before being automatically and permanently deleted.

PleaseReview Inbox

my reviews

Reviews I'm in (1)

Reviews I own

Search for reviews

Recycle bin

Include: ☐ All workgroups

Due Date

Review Title

Review Owner

Review Status

Details

29 May 2017 23:45

Security Policy

Zoe Wright

In Progress

Select

refresh

printable view

Using 'Select' allows you to either purge or restore the review. Purge will delete the review permanently whilst restore will return it to 'Reviews I own'.

Note: if you purge the review it will be deleted permanently and this action cannot be undone.



4.2 System Alerts

The System Administrator can issue system alerts. This is typically to advise or remind users that the system will be re-started at a certain time (for example, due to enhancements or a change of system configuration settings). A system alert will generate a pop up window and will also appear in the PleaseReview banner at the top of the screen.



5 The Review Control Panel

The Review Control Panel provides summary information about the review and can be accessed from the PleaseReview inbox.

The screenshot shows the 'PleaseReview Inbox' interface. It includes a search bar, tabs for 'Reviews I'm in (2)', 'Reviews I own', 'Search for reviews', and 'Recycle bin'. Below these are filters for 'My status is' (Not started, In progress, Completed) and 'Include' (Closed reviews, All workgroups). A table lists reviews with columns: Due Date, Title, Owner, Review Status, My Status, Details, and Review. The 'Details' column contains 'Select' and 'Enter' links. A tooltip is shown over the 'Select' link, stating: 'Hover over the 'Select' link for information'.

Due Date	Title	Owner	Review Status	My Status	Details	Review
29 May 2017 23:45	Security Policy	Zoe Wright	In Progress	Not Started	Select	Enter
5 May 2017 23:45	Vendor Management Procedure	Zoe Wright	In Progress	In Progress	Select	Enter

Name	Status	Summary	Comments
John Tanner	Not Started		0
Sarah Henderson	In Progress		1
Zoe Wright	Review Owner		0

Hovering over the 'Select' link displays a tooltip showing a subsection of the information held in the Review Control Panel.

To go to the Review Control Panel, click the 'Select' link.



The Review Control Panel provides all the information relating to the specific review. Your own personal status in the review is shown in the lower section under 'your comments'. This includes the number of comments and proposed changes you have made along with the individual status of your comments.

PleaseReview Inbox

review control panel - Vendor Management Procedure

Vendor Management Procedure (id 105)

Description	Review of the procedure, risk classifications and master contract.
Review Status	In Progress (Due: 5 May 2017 23:45; Started: 20 Apr 2017 15:49)

participants

Name	Status	Role	Summary	Comments
John Tanner	Not Started	Reviewer		0
Sarah Henderson	In Progress	Reviewer		1
Zoe Wright	Review Owner	Owner		0

your comments

Document	Open	Accepted	Merged	Closed	Withdrawn
Vendor Management Procedure.docx	1	0	0	0	0



Create Sub-Review

Status Download copy Notify Delegate Copy Emails

View ReportBack



5.1 View Report

The 'View Report' button opens the reconciliation report (see [The Reconciliation Report](#)). You can also download the reconciliation report in Microsoft Excel using the  button, and in Microsoft Word using the  button.

5.2 Reviewer Options

There are various Reviewer options available from the Review Control Panel.

[Status](#) [Download copy](#) [Notify](#) [Delegate](#) [Copy Emails](#) [Import PDF Annotations](#)

Most of these options can be enabled or disabled through the system setup or by user types and therefore may not be available to you.

5.2.1 Status

In addition to being able to set your review status and your review 'watch' status when leaving a review, it is also possible to access the status options from the Review Control Panel by selecting the 'Status' link:

The screenshot shows a web form titled 'Set Status' with a 'Download copy' link. The main heading is 'update your participant status'. Below this, there is a section 'Select a value to indicate your status to the author' with four radio buttons: 'Not started', 'In progress' (which is selected), 'Completed', and 'Offline'. Below the radio buttons is a text input field with the placeholder 'Enter an optional summary comment to appear on the author's review status page'. At the bottom, there is a section 'Send me an email notifying me when there is activity on:' with a dropdown menu currently set to 'any paragraph'.



5.2.2 Download Copy

If enabled by system configuration settings, the Owner has the option to allow Reviewers to download a copy of the original document. In this event the 'Download copy' tab will be enabled. Reviewers can optionally download the document with comments (Word, Excel and PDF only). Documents which do not support the downloading of comments will have this option grayed out.

download copy - mixed documents

Set Status

Download copy

Select Comments

Document	Original document	With comments
Images and Equations.doc	Download	Download
Intro to pleasereview (demo long).ppt	Download	Download
punctuation.pdf	Download	Download
Test excel 1.xlsx	Download	Download

Click to download a copy of the document(s.)
You should save the document onto your local machine (do not right-click.)

Click "Select Comments" to tailor the download (Note: this only takes effect if "With comments" download is clicked.)

Reviewers can optionally download the document with comments (Word, Excel and PDF only).

For a detailed explanation of how comments and proposed changes will be rendered in the document download, see [Word Document 'Round-tripping'](#); [Excel Document 'Round-tripping'](#); or [PDF Document Download](#).



5.2.3 Notify

The 'Notify' option (if available) allows review participants to send an email including a link to the review, together with personal comments, to selected review participants.

The email text is customizable for each installation. However, the email will show the initiator of the email as the sender, and will normally include the same links as the review invitation email.

notify - send an email link to review participants

select participants

Name	Email	Selected
Demo Author 1	Demo_Author_1@pleasetech.com	<input checked="" type="checkbox"/>
Demo Author 2	Demo_Author_2@pleasetech.com	<input checked="" type="checkbox"/>
Demo Contributor 1	Demo_Contributor_1@pleasetech.com	<input checked="" type="checkbox"/>
Demo Contributor 2	Demo_Contributor_2@pleasetech.com	<input checked="" type="checkbox"/>
Demo Owner	Demo_Owner@pleasetech.com	<input checked="" type="checkbox"/>
Demo Reviewer 1	Demo_Reviewer_1@pleasetech.com	<input checked="" type="checkbox"/>
Demo Reviewer 2	Demo_Reviewer_2@pleasetech.com	<input checked="" type="checkbox"/>
Demo Reviewer 3	Demo_Reviewer_3@pleasetech.com	<input checked="" type="checkbox"/>
Demo Reviewer 4	Demo_Reviewer_4@pleasetech.com	<input checked="" type="checkbox"/>

Select All Deselect All

enter email details

Subject: Review of "Version 4 User manual"

Body:

OK Cancel



5.2.4 Time in the Review

PleaseReview can optionally prompt the Reviewer for the time spent in the review on the 'finish review' screen.

A screenshot of the 'finish review' screen. The title 'finish review' is at the top left. Below it is a section titled 'update your participant status'. Inside this section, there is a prompt 'Select a value to indicate your status to the author' followed by four radio buttons: 'Not started', 'In progress' (which is selected), 'Completed', and 'Offline'. Below the radio buttons is a text area with the prompt 'Enter an optional summary comment to appear on the review control panel'. At the bottom of the section is a prompt 'Enter Total Review Time (In Minutes) *' followed by a small input field, which is highlighted with a red rectangle. Below this is a dropdown menu with the text 'Send me an email notifying me when there is activity on:' and the selected option 'any paragraph'. An 'OK' button is located at the bottom right of the form.

Notes:

- This is a system configuration setting and so may be turned on or off at a system level. If turned off, it will not appear. The review time is recorded in minutes as a Reviewer-entered figure;
- The review time does not actually record the amount of time that the Reviewer has spent in the review (i.e. had the review open). The default is zero unless changed by the Reviewer;
- If enabled, it is mandatory to enter a value. The time spent in the review is also recorded on the Review Control Panel.



5.2.5 Review Metrics

PleaseReview includes an optional review metrics/categorization feature. The Reviewer would see this as a 'Metrics' button at the bottom of the Review Control Panel.



The button's existence and its name are entirely configurable, as are the contents of the metrics screen. For Reviewers, the screen is read-only and thus for information only.

This feature allows the categorization of the review for reporting purposes.

A screenshot of the 'Custom review metrics' dialog box. It contains four input fields: 'Node Id' (text), 'Size' (text), 'Units' (dropdown menu with 'Pages' selected), and 'Stage Detected' (dropdown menu with 'Baseline' selected). At the bottom right are 'OK' and 'Close' buttons.

Custom review metrics	
Node Id	<input type="text"/>
Size	<input type="text"/>
Units	<input type="text" value="Pages"/>
Stage Detected	<input type="text" value="Baseline"/>
<input type="button" value="OK"/> <input type="button" value="Close"/>	



5.3 Review Owner Options

Review Owners have additional options available to manage their reviews in the Review Control Panel:

review control panel - Security Policy

Security Policy (id 106)

Description	A new approach to the security policy...		
Review Status	In Progress (Due: 29 May 2017 23:45; Started: 20 Apr 2017 15:56)		Extend deadline

participants

Name	Status	Role	Summary	Comments
John Tanner	Not Started	Reviewer		0
Sarah Henderson	Not Started	Reviewer		0
Zoe Wright	Review Owner	Owner		0

comment summary

Document	Type	Open	Accepted	Merged	Closed	Withdrawn
Offline policy document.docx		0	0	0	0	0
Sample policy document.docx		0	0	0	0	0
Security policy_high level information.docx		0	0	0	0	0
Policy references and catalog.docx	ref	-	-	-	-	0
Schedule.docx	ref	-	-	-	-	0

[Email Status](#) [Edit Details](#) [Delete Review](#)

[Status](#) [Download copy](#) [Notify](#) [Copy Emails](#)

[View Report](#) [Review Closeout](#) [Back](#)

Notes:

- 'Edit Details' allows you to edit the review details. Please note: depending on your system configuration settings, some restrictions may apply if the review has been started;
- 'Delete Review' moves it to the recycle bin. If the recycle bin is not available, the review will be deleted permanently. **Please note: deleting a review will completely delete all traces of the review permanently. It is not possible to retrieve a review once deleted;**
- If the review has not been started, the status will be set to 'On Hold' and there will be a 'Start Review' button available.



5.3.1 Transferring Ownership of a Review

The review Owner, if permitted by the system configuration setting, is able to transfer ownership of a review to another member of the Workgroup with review Author permissions. This option is located under the 'Edit Details' option on the Review Control Panel.

edit review details - ABC Procedure Review

review details		Edit
Title	ABC Procedure Review	
Description		
Status	In Progress	
End Date	7 Jan 2017 23:45	
Transfer Ownership To	Gideon Demo ▼	Transfer

Notes:

- The review Owner can only transfer ownership to another user with Author permissions in the Workgroup. If that user is not a member of the review they will be added to the review as a participant;
- Once transferred, the original review Owner cannot 'reclaim' ownership of the review. It must be transferred back to the original review Owner by the current review Owner, Workgroup Administrator or System Administrator;
- The original review Owner will remain a review participant whose role in the review is determined by a configurable system setting.

5.3.1.1 Transferring Ownership of a Review with EditZones

The role of the new review Owner on the review is Owner only, regardless of their original role. If they were originally a Contributor on the review with EditZones assigned to them, they need to edit their role on the review to Owner-Contributor in order to be able to download the EditZones. The same applies to the original review Owner.



6 Accessing a Review

There are two ways to access a review. Either via the invitation email or by logging in directly to the PleaseReview inbox.

6.1 Accessing a Review via the Invitation Email

When you are invited to participate in a review, you will receive an invitation email:

Dear John Tanner,

1 You have been invited by Zoe Wright to participate in the review "Vendor Management Procedure".

2 The review description is: Review of the procedure, risk classifications and master contract.

3 Your role in this review is: Reviewer

4 Participant(s) in this review:
John Tanner - Reviewer
Sarah Henderson - Reviewer
Zoe Wright - Owner

5 The review is due by 5 May 2017 23:45

To go to your PleaseReview inbox in Oracle Documents Cloud:

6 1. Login to Oracle Documents Cloud using the URL <https://pleasereview.oraclecloud.com>
2. Check any folder to activate the menu bar.
3. In the menu bar, click on "PleaseReview Inbox". This may be under the "More" dropdown.
4. The PleaseReview inbox will launch within Oracle Documents Cloud.
5. Select the "Reviews I'm in" tab.
6. Click enter next to the review "Vendor Management Procedure".

1 Review title

2 Review description

3 Your role in the review

4 Other participants in the review

5 Review due date

6 Steps to access the review

Notes:

- If the link is broken or incomplete, you will need to copy it into your browser address bar, making sure that it is complete.



6.2 Accessing a Review by Logging On

If you log in to Oracle Documents Cloud directly you can access your reviews from your PleaseReview inbox (see [My Reviews](#)):

The screenshot shows the Oracle Content and Experience Cloud interface. A 'PleaseReview Inbox' modal is open, displaying 'my reviews'. The modal has tabs for 'Reviews I'm in (2)', 'Reviews I own', 'Search for reviews', and 'Recycle bin'. Below the tabs, there are filters for 'My status is' (Not started, In progress, Completed) and 'Include:' (Closed reviews, All workgroups). A table lists reviews with columns: Due Date, Title, Owner, Review Status, My Status, Details, and Review. Two annotations with orange boxes and arrows point to specific elements: one points to the filter checkboxes with the text 'Check boxes to filter reviews', and another points to the 'Select' and 'Enter' links in the table with the text 'Select link to go to the Review Control Panel' and 'Enter link to enter the review'.

Due Date	Title	Owner	Review Status	My Status	Details	Review
29 May 2017 23:45	Security Policy	Zoe Wright	In Progress	Not Started	Select	Enter
5 May 2017 23:45	Vendor Management Procedure	Zoe Wright	In Progress	Not Started	Select	Enter

To view the review details, use the 'Select' link. This takes you to the Review Control Panel.

To enter the review without seeing the review details, use the 'Enter' link.

Note, if the review does not have an 'Enter' link it is either 'Not Started' or is a ReviewFlow review.

Chapter Three

Review Set Up

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7 Creating a Review

Review creation is available only to those users with Author permissions in PleaseReview. In addition, you must have 'Contributor' or 'Manager' permission in Oracle Documents Cloud on any of the documents to be added to the review, as the system may automatically perform a document reservation.

There are two ways to create a new review and both options will invoke the new review wizard:

- i. Start a new review from a document (suitable for reviews of a single document only); or
- ii. Start a new review from folder level and then browse to select the review document(s).

Notes

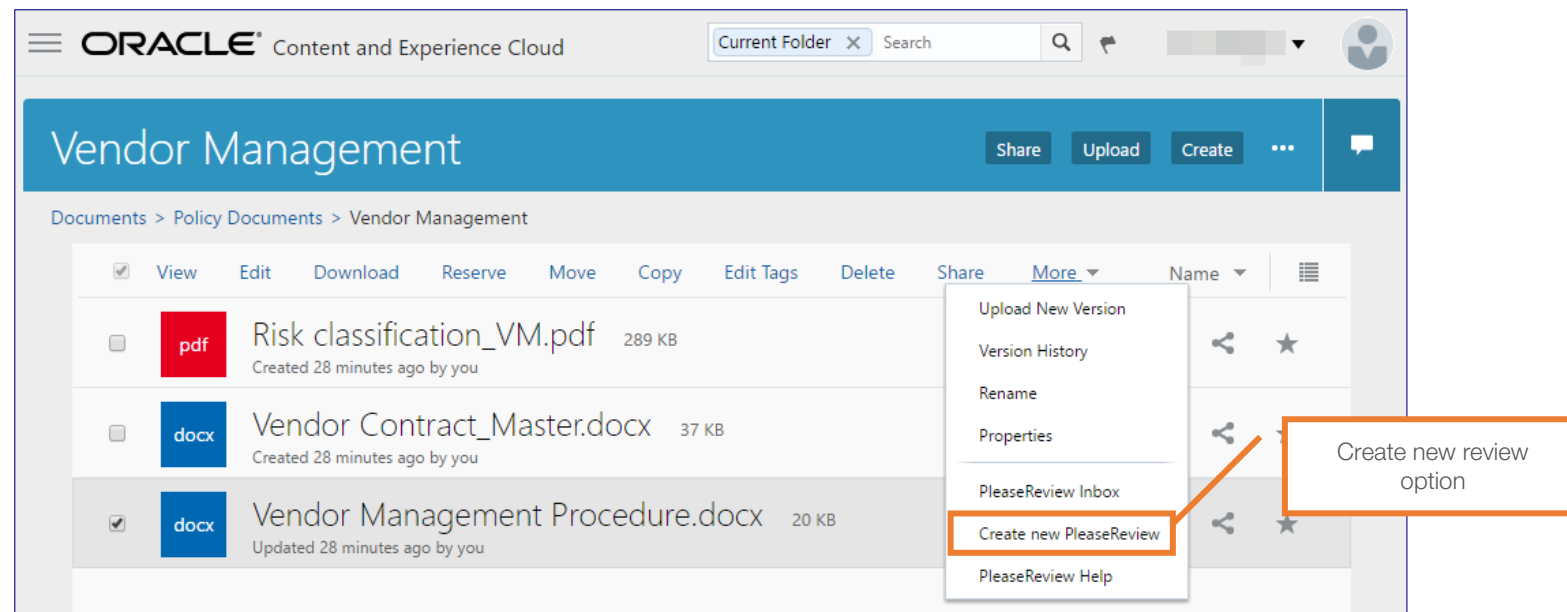
- The review creation process must be completed within 15 minutes, before the session will be timed-out;
- Once a document is included in a review it can be reserved in Oracle Documents Cloud (normally only applies to Microsoft Word and Excel documents);
- Reserved documents (identified by the padlock symbol) cannot have new reviews created on them. To include reserved documents in a review, start the review at folder level and browse to select the document. Note that the document will NOT be reserved.

Important: Before creating a new review, it is imperative that the documents/folders to be used in the review are shared with the member 'PleaseReview' with the permission of 'Contributor' in Oracle Documents Cloud see ([Important Note](#)).

Review Set Up



To start a new review from a document, browse to the relevant folder using standard Oracle Documents Cloud functionality. Select the document and then select 'Create New PleaseReview' from the 'More' toolbar menu. Alternatively, the right click menu will also have the option to start a new review:



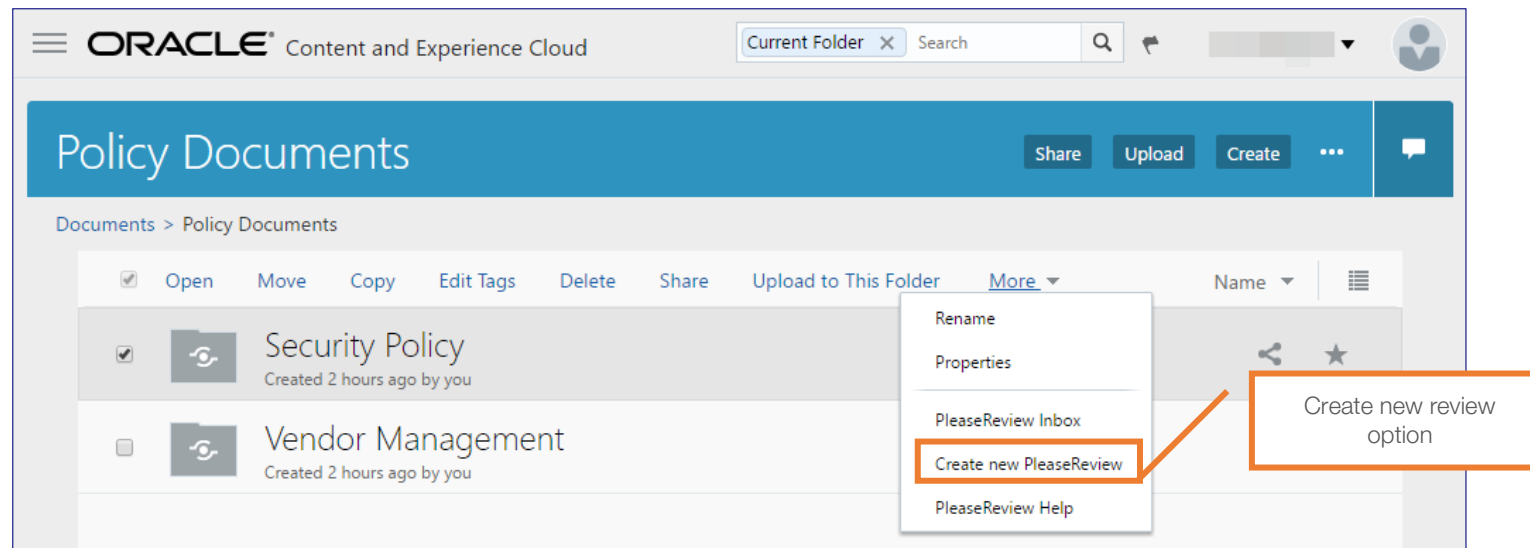
This method of starting a new review will allow the inclusion of a single document only. To create a review containing more than one document, the review must be created from the folder level.

Important: Before creating a new review, it is imperative that the documents/folders to be used in the review are shared with the member 'PleaseReview' with the permission of 'Contributor' in Oracle Documents Cloud see ([Important Note](#)).

Review Set Up



To start a new review with multiple documents, select the relevant folder and then select 'Create New PleaseReview' from the toolbar menu. Alternatively, the right click menu will also have the option to start a new review:



Important: Before creating a new review, it is imperative that the documents/folders to be used in the review are shared with the member 'PleaseReview' with the permission of 'Contributor' in Oracle Documents Cloud see ([Important Note](#)).



7.1 Step 1. Specify Review Details

At step 1, you specify the basic review details:

Create new PleaseReview [X]

new review step 1: specify review details

Title	Security Policy	Enter a review title (must be unique)																																																	
Description	A new approach to the security policy...	Enter a description (optional)																																																	
ReviewFlow	<input type="checkbox"/> Creates a multi-phase review																																																		
End Date	date : 29 May 2017 time : 23 ▼ 45 ▼ <table border="1"><thead><tr><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th><th>Sun</th></tr></thead><tbody><tr><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td></tr><tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr><tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr><tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr><tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr><tr><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td></tr></tbody></table>	Mon	Tue	Wed	Thu	Fri	Sat	Sun	24	25	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	Set the review end date (must be in the future)
Mon	Tue	Wed	Thu	Fri	Sat	Sun																																													
24	25	26	27	28	29	30																																													
1	2	3	4	5	6	7																																													
8	9	10	11	12	13	14																																													
15	16	17	18	19	20	21																																													
22	23	24	25	26	27	28																																													
29	30	31	1	2	3	4																																													

Next

Notes:

- The title is a mandatory field and must be unique;
- The description is an optional field and will appear in the email invitation to participants;
- The review end date must be in the future;
- Selecting 'Creates a multi-phase review' will create a multi-phase review (see [ReviewFlow™ Multi-Phase Reviews](#));
- The review creation process must be completed within the 15 minute Oracle Documents Cloud time-out window.



7.2 Step 2. Confirm Document Selection

At step 2, you confirm the documents selected for review:

Create new PleaseReview [X]

new review step 2: upload documents

documents already attached to this review:

File name	Title	TOC Levels (Word only)	Uploaded	Preparation	
Vendor Management Procedure.docx	Vendor Management Procedure.docx	All	20 Apr 2017	Successful	Delete

Selecting files from Oracle DOCS - Pleasetch2 ▼

File

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

Documents included in the review

Document source selector

Notes:

- If you have selected the 'Create New PleaseReview' option from folder level there will be no documents attached to the review and you must upload one or more documents at this step in order to continue;
- You must have 'Contributor' or 'Manager' permission on any of the documents to be added to the review;
- Once a document is included in a review it can be reserved in Oracle Documents Cloud (Word and Excel documents only);
- Depending on configuration, you may be able to add documents from both Oracle Documents Cloud and the local file system;
- .ZIP and .TIF files are not supported in the Oracle Documents Cloud integration;
- To create a comparison between Microsoft Word documents in the review, see [Document Comparison and Review Linking](#);
- For Word documents containing comments or tracked changes/ moves, see [Uploading a Document with Existing Comments](#);
- For Microsoft Word documents containing citations, see [Uploading a Document with Citations](#);
- For PDF files containing existing PDF annotations, see [Uploading a PDF with Existing Annotations](#).

Review Set Up



If Oracle Documents Cloud is your selected document source the repository browse window will open which allows you to browse the repository and select the required document(s):

The screenshot shows a web interface titled 'Security Policy' with a 'Review' dropdown menu. Below the header, there is a table of documents. Annotations with orange boxes and arrows point to specific elements:

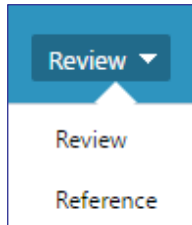
- Click 'Upload for Review' once required documents selected:** Points to the 'Upload for Review' button.
- Select required documents using checkboxes:** Points to the checkboxes in the first column of the document table.
- Select document type:** Points to the document type icons (docx, pdf) in the second column of the document table.

	Security Policy	Review	Reference	Name Ascending
<input type="checkbox"/>	Upload for Review			
<input checked="" type="checkbox"/>	Offline policy document.docx 19 KB Created 20/04/2017 by Zoe Wright			
<input type="checkbox"/>	Policy references and catalog.docx 90 KB Created 20/04/2017 by Zoe Wright			
<input checked="" type="checkbox"/>	Sample policy document.docx 45 KB Created 20/04/2017 by Zoe Wright			
<input type="checkbox"/>	Schedule.docx 18 KB Created 20/04/2017 by Zoe Wright			
<input checked="" type="checkbox"/>	Security policy_high level information.docx 26 KB Created 20/04/2017 by Zoe Wright			
<input type="checkbox"/>	Security policy_high level information.pdf 184 KB Created 20/04/2017 by Zoe Wright			

Note: All documents must be uploaded to PleaseReview within 15 minutes, before the session is timed-out.



Clicking on the document type drop-down arrow in the file selector window will provide the document type options:



There are two options for the document type:

Document Type	Description
Review (default)	The document is available for commenting.
Reference	The document is available for reference purposes only and cannot be commented on. The 'reference only' status is indicated on the screen when in the review.

Review Set Up



Once all required documents have been uploaded to PleaseReview, you can use the up and down arrows to re-order documents in the review:

Create new PleaseReview

new review step 2: upload documents

documents already attached to this review:

File name	Title	TOC Levels (Word only)	Type	Uploaded	Refresh		
Offline policy document.docx	Offline policy document.docx	All		20 Apr 2017	Successful	↓	Delete
Sample policy document.docx	Sample policy document.docx	All		20 Apr 2017	Successful	↑ ↓	Delete
Security policy_high level information.docx	Security policy_high level information.docx	All		20 Apr 2017	Successful	↑ ↓	Delete
Policy references and catalog.docx	Policy references and catalog.docx	All	ref	20 Apr 2017	Processing	↑ ↓	Delete
Schedule.docx	Schedule.docx	All	ref	20 Apr 2017	Processing	↑	Delete

Selecting files from

Oracle DOCS - Pleasetechn2

File

Browse...

Previous

Next

Re-order documents

Delete document from review

Reference document



7.2.1.1 Image Collections

For each folder containing images, the images are grouped together and added to the review as a single image collection. The document title is the folder name or, if the images are in the top level, the same as the zip file name.

An image collection displays the images together for review as if they were a single document within PleaseReview. A table of contents is shown when reviewing an image collection, listing the names of the files as they were in the original zip file. Layout mode displays an image at a time.

Notes:

- The only way to add an image collection to a review is with the zip file upload;
- If the zip file has two folders of the same name both containing images, these will be merged into a single image list;
- In the review, all images are shown full size.

7.2.2 Uploading an Unrecognized File Type

If the file extension of the file is not recognized, or there isn't one, the file will be handled as an unrecognized file type. When entering the review participants are presented with a link to view the file, and can use the general comment feature only within PleaseReview.



7.2.3 Uploading a Document with Existing Comments/Tracked Changes

When uploading Word documents with existing comments; tracked changes; and tracked moves, PleaseReview will display a notification (in the new V6.1 review interface) to indicate paragraphs where Word comments and/or tracked changes/moves are present.



Notes:

- Although Microsoft Word comments and tracked changes/moves will be visible in the document, they will not be included as PleaseReview comments and proposed changes;
- If you edit a paragraph which contains Microsoft Word comments or tracked changes/moves in PleaseReview, the tracked changes/moves will be presented as accepted changes, the comment markers will not be displayed but the indicator (shown above) will remain in place;
- Further detail on the Microsoft Word comments and tracked changes/moves can be viewed in the paragraph history window, under 'Original Text';
- If the Word tracked changes/moves need to be retained, the Author/Owner should select proposed changes applied as Word comments under the 'Select comments' function prior to document download. This will make all proposed changes Word comments attached to the Word paragraph and the existing Word tracked changes and moves will be preserved (see [Word Document 'Round-Tripping'](#)).



7.2.4 Uploading a Document with Citations

In a standard review of a Microsoft Word document containing citations, the citations and any associated bibliography will be displayed and links may be followed, etc. Citations, and their associated bibliography display in gray shading to identify the content as a field and Reviewers can add comments and make proposed changes to the paragraph in the usual way.

Notes:

- There is no ability to edit citation text or bibliography text in PleaseReview;
- Comments can be added to citations and bibliographies, and citations and bibliographies can be formatted or deleted in PleaseReview as a proposed change;
- Round-tripped paragraphs in the Word document which have accepted or open proposed changes will retain any citations and references (stored in the Word document as fields);
- There are certain limitations with bibliographies when a review contains EditZones. See [Citations and Bibliographies](#).

7.2.5 Uploading a PDF with Existing Annotations

When uploading PDF documents with existing annotations, the annotations will be visible in the document, however they will not be included as PleaseReview comments and proposed changes.

If the PDF annotations need to be included in the review as PleaseReview comments and proposed changes, the Author/Owner should first upload the original PDF without annotations and import the annotations after starting the review (see [Importing PDF Annotations](#)).



7.3 Step 3. Add Participants

At step 3, you add participants to your review:

Create new PleaseReview [X]

new review step 3: specify participants

add new participants [Show members](#)

Reviewer:

Add roles: [Author](#) [Contributor](#) [Other roles ▼](#)

[Add](#)

participants already included on this review:

Name	Email	Role	Details	Participant
Zoe Wright	[redacted]	Owner	Edit	Remove

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

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

Enter text to search

Select different role types

Click 'Add' or 'Next' to add participants to the review

Notes:

- There is no limit to the number of participants in a review;
- You can add participants from several distribution lists;
- Review Owners can set up personal distribution lists from this screen (see [Adding Participants from Existing Distribution Lists](#));
- Workgroup Administrators can create shared distribution lists;
- Distribution lists include the participant's role. Once added, they can be moved to another role.



7.3.1 Add Participants from Search

By entering text in the search box you are able to easily locate users. PleaseReview will provide a list of suggested users as you type:

Create new PleaseReview

new review step 3: specify participants

add new participants Show members

Reviewer:

Add roles:

- John Tanner ()
- Sarah Henderson ()

participants already included on this review:

Name	Email	Role	Details	Participant
Zoe Wright		Owner	Edit	Remove

Suggested users will appear matching text entered

Then simply add the user by clicking the suggestion or pressing the Enter key. You can select the 'Add' button once you have selected all participants, or they will be added when you click 'Next'.

If no users are found matching the criteria this may be because the user is not in the Workgroup. If Taskgroups are enabled you can move the review to a Taskgroup and search again for users. See [Moving Participants to Taskgroups/Workgroups](#).

7.3.2 Add Participants in Bulk

You can add participants in bulk using a list of user email addresses taken from other sources, such as Outlook. All PleaseReview users from the list will be added to the review. If any do not match that of a PleaseReview user it is flagged.



7.3.3 Add Participants from Existing Distribution Lists

If you have any distribution lists set up, they are available to you in the drop down. Selecting a distribution list will display all participants included on the list. They may then be added to the review:

Create new PleaseReview [X]

new review step 3: specify participants

add new participants [Show members](#)

Reviewer:

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

[Policy Review Team](#)

[QA Group](#) [Add](#)

participants already included on this review:

Name	Email	Role	Details	Participant
Zoe Wright		Owner	Edit	Remove

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

After selecting a distribution list, the users on that list are added to the relevant role. You can then change their role, or remove them.

Notes:

- You can add participants from several distribution lists;
- If a user has a Workgroup role of Delegator you can allow the user to add one or more additional participants into a review whilst remaining active in the review themselves. This is separate from the standard 'simple delegation' which does not require any specific privileges. To enable this, click 'Edit' and check the '+P' checkbox. This column is not visible unless delegation is enabled.



7.3.4 Creating and Managing Distribution Lists

Once participants are added ('participants already included on this review'), it is possible to use this list to create and/or maintain existing personal distribution lists. Shared distribution lists are created and managed by Workgroup Administrators.

Selecting the 'Manage distribution lists' link will open a new pop-up window:

distribution lists

participants already included on this review:

Name	Email	Role
John Tanner		Reviewer
Sarah Henderson		Reviewer
Zoe Wright		Owner

create or update a distribution list from the current list of review participants

☐ Overwrite an existing distribution list Policy Review Team ▼

☐ Create a new personal ▼ distribution list called

OK **Cancel**

Within the distributions lists dialog box, you can overwrite an existing personal distribution list which replaces all the users on the existing list with the new participants and their role, or create a new distribution list. This creates a new personal distribution list of the review participants and their associated role.

To create a new personal distribution list, select the 'create a new personal distribution list' radio button and enter the list title. Then click 'OK'.



7.3.5 Moving Participants to Taskgroups/Workgroups

You are only able to add participants to a review if they are in the Workgroup in which the review is based.

Taskgroups are designed to allow users from multiple Workgroups to participate in the same review.

new review step 3: specify participants

add new participants [Show members](#)

Reviewer:

Add roles: [Author](#) [Contributor](#) [Other roles](#) ▼

[Add](#)

participants already included on this review:

Name	Email	Role	Details	Participant
Zoe Wright		Owner	Edit	Remove

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

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

Taskgroups are designed to be a self-maintaining temporary environment for cross Workgroup collaboration. They are automatically deleted if there are no reviews in them and you will be automatically removed from them if you are not in a review in that Taskgroup.

Notes:

- The review can be moved to an existing Workgroup or Taskgroup of which you are already a member;
- Only Workgroups are listed where you have the role of Author;
- The review can be moved to a new Taskgroup which you create instantly;
- The review can be moved to an existing Taskgroup of which you are not a member (but the system will automatically add you);
- If moving a review to a new Workgroup, all participants must be in this new Workgroup, if not they will be removed from the review.



7.3.6 Taskgroups and Delegation

Delegation is not designed to work with Taskgroups. If a review participant wishes to delegate their role in a review which is in a Taskgroup, they will only have the option of selecting existing members of the Taskgroup that are not already included in the review. It will not be possible to add users to the Taskgroup in this instance. For more information see [Delegation](#).

7.3.7 Special Instructions for Review Participants

Once participants are included in a review there is the ability to add special instructions using the 'Edit' option.

An additional column indicates the presence of special instructions for a participant. These instructions are included in the participant's invitation email and also on their Review Control Panel. Only the participant will see the special instructions.

The screenshot shows a table of participants and a modal for editing details. The table has columns for Name, Email, Role, Details, and a partially visible 'Parti' column. The 'Details' column contains 'Edit' links for each participant. The modal, titled 'edit participant details', shows the details for Paul Patterson, including his email, role (Author), and a text area for special instructions. An orange box highlights the 'Edit' link for Paul Patterson in the table, with an arrow pointing to the modal.

Name	Email	Role	Details	Parti
Helen Harris	helenharrisdemo@pleasetech.com	Owner	Edit	Renx
Joe Jones	joe.jonesdemo@pleasetech.com	Reviewer	Edit	Renx
Mike Malone	mike.malonedemo@pleasetech.com	Reviewer	Edit	Renx
Paul Patterson	paulpattersondemo@pleasetech.com	Author	Edit	Renx

edit participant details

Name: Paul Patterson

Email: paulpattersondemo@pleasetech.com

Role: Author

+P: ☒

Special Instructions: This is a note for Paul. No other participants will see this message.

Update Cancel



7.4 Step 4. Set Review Options

At step 4, you set your review options:

Create new PleaseReview [X]

new review step 4 : review options

Review Options | Email Options | ReviewZone Options | Subteams

offline settings

Allow reviewers to download a copy of the document ☒

Allow reviewers to review documents offline ☒

independent review

Reviewers do not see each others comments. Authors see all comments ☐

allow proposed changes

Allow proposed changes in review ☒

allow sub-review

Allow review participants to create a sub-review from this review ☒

comparison and linking

Review is not linked. Click to link this review to a previous one [Link](#)

Compare documents within the review ☐

delegation

Allow review participants to delegate? ☒

mandatory categorization

Force review participants to select a comment category ☐

Save

Callout boxes (left):

- Set offline and independent review settings (points to offline settings)
- Configure email settings (points to Email Options tab)
- Enable ReviewZones (points to ReviewZone Options tab)
- Set up Subteams (points to Subteams tab)

At the bottom of the Review Options screen there are additional options:

- 'Previous' and 'Next' step through the new review wizard. They do NOT affect tab selection;
- 'Save' will save any selections made in the tab;
- Changing tabs after making an amendment without saving generates a prompt asking to save or discard the changes.



7.4.1 Review Options

The 'Review Options' tab allows the Owner to configure download, offline and independent review settings.

Review Option	Description
Download copy of document	This provides Reviewers with the option to download a copy of the original document. This copy of the document is not designed for offline review, but is simply a means of providing a 'clean' copy of the document from the system.
Review documents offline	This defines whether Reviewers are able to review offline. If selected, the offline review options are enabled, and the documents are available to the offline review client (OLC) application.
Independent review	Creates an independent review. Reviewers cannot see each other's comments and proposed changes (and are not even aware that other Reviewers exist). The Owner's experience remains unchanged and they can see all comments and changes.
Allow proposed changes	If deselected, this option disables the proposed change functionality within the review and so the review participants can only make comments and will not be able to mark up the document.
Do not auto-delete	Prevents the review being automatically deleted or moved to the recycle bin (if available) after a system defined interval following the last activity. The review must be completed to be auto-deleted.
Comparison and linking	See Document Comparison and Review Linking .
Delegation	Allows participants to delegate their role in the review to another member of the Workgroup. See Delegation .
Mandatory categorization	Forces participants to select a category when entering a comment or proposed change.



7.4.2 Email Options

The 'Email Options' tab allows the Owner to configure various email options. Note: some options may not be available if disabled by system configuration settings.

Email Option	Description
Send invitation emails to participants	Unchecking 'Send invitation emails to participants' stops automatic system generated review invitation emails from being sent to review participants. The Owner can send personal emails with review URLs available from the Review Control Panel (see Review Control Panel) or communicate this information to participants in another manner.
Send me an email when all participants indicate they have completed the review	Unchecking this option prevents the Owner receiving an automatic system email when all Reviewers have set their status to 'Completed'.
This document is currently a template. Inform Reviewers that there may initially be no content to review but that they will be notified when content becomes available	This option includes text in the invitation email to the effect that the document is a template and that there may be no content to review until they receive a further email.
Notify contributors if new EditZones are allocated while the review is in progress	Contributors are notified by email if new EditZones are allocated to them while the review is in progress.
When an EditZone is published for review, all Reviewers are notified of this	Generates a new email to all Reviewers whenever an EditZone is published for review by a Contributor.
Notify me whenever an EditZone is revised	Notifies the review Owner whenever an EditZone is revised or published for review.
Email reminders	Up to three reminder emails can be sent. The reminders can be set by number of days or hours before the end of the review. Only participants who have not completed their review will receive reminders.



7.4.3 ReviewZone Options

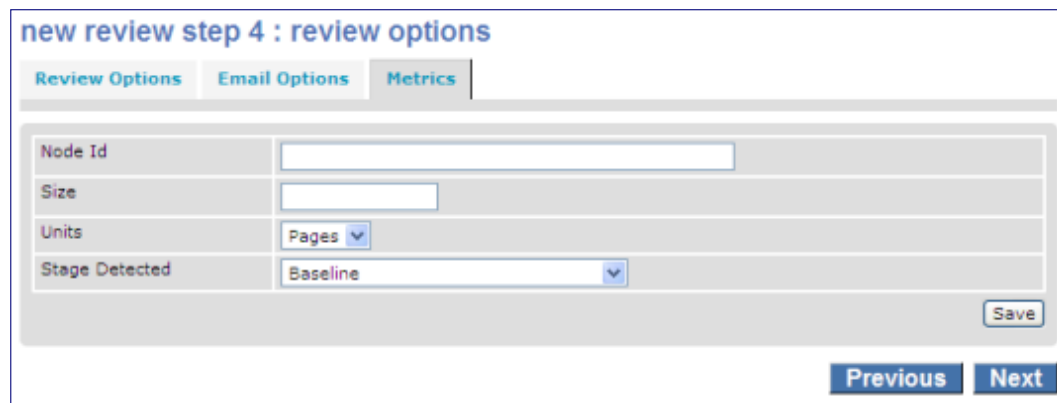
The 'ReviewZone Options' tab allows the Owner to enable ReviewZones in the review. See [ReviewZones](#) for more information.

7.4.4 Subteams

The 'Subteams' tab allows the Owner to set up Subteams within the review. See [Subteams](#) for more information.

7.4.5 Metrics

The 'Metrics' tab is a system configurable setting. If not enabled, it will not appear. If enabled, it allows the review Owner to enter values against fields which enable the review to be categorized for reporting purposes.



The screenshot shows a web form titled "new review step 4 : review options". It has three tabs: "Review Options", "Email Options", and "Metrics", with "Metrics" being the active tab. The form contains four input fields: "Node Id" (text), "Size" (text), "Units" (dropdown menu with "Pages" selected), and "Stage Detected" (dropdown menu with "Baseline" selected). A "Save" button is located at the bottom right of the form area. Below the form, there are two blue buttons: "Previous" and "Next".

Note: the 'Metrics' tab is a system configurable setting. If not enabled, it will not be available. All fields, field types, etc., even the name of the tab, is configurable at system level. Therefore, the number and type of fields will be different from installation to installation. Fields may be validated at entry time.



7.4.6 Document Comparison and Review Linking

Document comparison is available for Microsoft Word documents only.

For document comparison to be available to the Reviewers, the review Owner must enable the option when the review is set up.

A screenshot of a web interface titled "comparison and linking". It contains two rows of settings. The first row has the text "Review is not linked. Click to link this review to a previous one" followed by a blue "Link" button. The second row has the text "Compare documents within the review" followed by an unchecked checkbox. At the bottom right of the panel is a "Save" button.

comparison and linking	
Review is not linked. Click to link this review to a previous one	Link
Compare documents within the review	<input type="checkbox"/>
Save	

There are two ways to provide document comparison. Either comparing documents in the same review, or comparing documents between reviews. This is an either/or option. It is not possible to compare documents within one review whilst linking to another review.

Note: If a document is added to the review after the review has been started, all comparison and linking is removed and must be redone. In this event, you will need to use the 'edit details' functionality to re-link the reviews or compare the documents within the review.

7.4.6.1 Compare Documents within a Review (Document Comparison)

The objective of this functionality is to allow review Owners to upload both the document under review and a previous iteration of the document for reference purposes. Reviewers are therefore able to observe the changes between the document under review and the previous iteration.

- In this event there can only be two Microsoft Word documents in the review and one must be a 'Reference only' document. It is possible to have other (non-Word) documents in the review;
- PleaseReview will generate the comparison between the Word document for review and the reference only Word Document (typically a previous version of the document).

This document comparison is initiated by selecting the check box 'Compare documents within the review':

A screenshot of a single checkbox labeled "Compare documents within the review". The checkbox is currently unchecked.

Compare documents within the review	<input type="checkbox"/>
-------------------------------------	--------------------------



7.4.6.2 Compare Documents between Reviews (Review Linking)

The objective of this functionality is to allow review Owners to make available a comparison between documents in different reviews.

For example, if the review is part of a series of reviews of the same document set then Reviewers can observe the changes between the current document(s) under review and the previous iteration of the document(s).

The review Owner links the review to a previous review by selecting the 'Link' option. A list of available reviews is displayed. The review Owner can then select the review to which the current review should be linked.

Review linking is initiated by selecting the 'Link' option in the review options.

This will open a view showing all reviews owned by the review Owner:

comparison and linking	
Select the previous review to link to this one	
Select by review status <input type="checkbox"/> In progress <input type="checkbox"/> Closed <input checked="" type="checkbox"/> Completed <input type="checkbox"/> Owned by others	
Review Title	
A FIRST DRAFT	select
Cancel	

Notes:

- The Owner of the current review being set up can link to any review that they own, they can also link to reviews owned by other Authors provided that they are either a Workgroup Monitor or a participant on the review they want to link to. In other words, if they can see the review they can link to it;
- Any non-Word documents will simply be ignored;
- In order for the Reviewer to be able to see a linked document, one of the following must be true:
 - 1) The Reviewer is also a participant in the linked review;
 - 2) The Reviewer is a review monitor;
 - 3) The Owner of the new review is also the Owner of the linked review.

Once a review is selected, the main screen will update to show the selection with the 'Compare documents within the review' option grayed out. To cancel the link, select the 'Unlink' option.



7.5 Step 5. Verify Review Details

At step 5, the final step in the new review set up, you verify the details of your review and confirm them:

Create new PleaseReview [X]

new review step 5: verify details and start review or put it on hold

review details [Edit]

Title	Security Policy
Description	A new approach to the security policy...
Status	Not Started
End Date	29 May 2017 23:45

participants [Edit]

Name	Email	Role
John Tanner		Reviewer
Sarah Henderson		Reviewer
Zoe Wright		Owner

documents [Edit]

File name	Title	Type	Preparation		
Security policy_high level information.docx	Security policy_high level information.docx		Successful	Preview	Delete
Policy references and catalog.docx	Policy references and catalog.docx	ref	Successful	Preview	Delete

[Delete Review](#) [Review Options](#)

[Put Review on Hold](#) [Start Review](#)

Each section can be edited

Edit review options

Start review

Notes:

- To edit the details, select 'Edit' against the appropriate area. To amend review or email options, select the 'Review Options' link;
- Documents can be previewed by selecting the 'Preview' link. This shows the document as Reviewers will see it;
- The review can now be started or placed on hold. Starting the review will send invitation emails to all participants and start the review. If placed on hold, the review will not start. It can be started at a later date from the Review Control Panel.



7.6 Creating a Source Code Review

Source code files are supported by default. The file extensions for C, C++, C#, Java, ADA, VHDL, Fortran and Xml are known to PleaseReview and will automatically be picked up on document upload.

7.7 PleaseReview Document Preparation Process

Each Microsoft Word, Excel, PowerPoint and PDF document must be prepared for display by PleaseReview. Preparation is automatic and initiated once the document has been uploaded.

Occasionally a document will not have completed preparation when starting a review. This depends on the size of the document and the status of the preparation queue.

If the document status is still 'Under Preparation', you will not be able to preview the document. You will still be able to set the review to 'Start' and the review will start as soon as preparation is complete.

If preparation is not complete and you wish to preview the document, place the review 'On Hold' and then come back to preview the document after an appropriate interval.



8 ReviewZones

ReviewZones are areas of a Word document which the review Owner can set up to assign different Reviewer permissions to different users. This could be to prevent individual users from commenting or marking-up changes to specific zones, or even prevent users from viewing certain zones.

Note: reviews containing ReviewZones automatically use the PleaseReview classic interface.

8.1 Enabling/Creating ReviewZones

ReviewZones can be enabled at step 4 of the new review wizard by clicking on the 'ReviewZone Options' tab:

The screenshot shows the 'new review step 4 : review options' interface. It has three tabs: 'Review Options', 'Email Options', and 'ReviewZone Options'. The 'ReviewZone Options' tab is selected. Below the tabs, there are two checkboxes: 'Enable ReviewZones' (checked) and 'Make read only for everyone' (unchecked). Below these is a table with three columns: 'Name', 'Email', and 'Permission'. The table contains two rows of data. An orange arrow points from a text box to the 'Enable ReviewZones' checkbox. Another orange arrow points from a text box to the 'Permission' dropdown menu in the first row of the table.

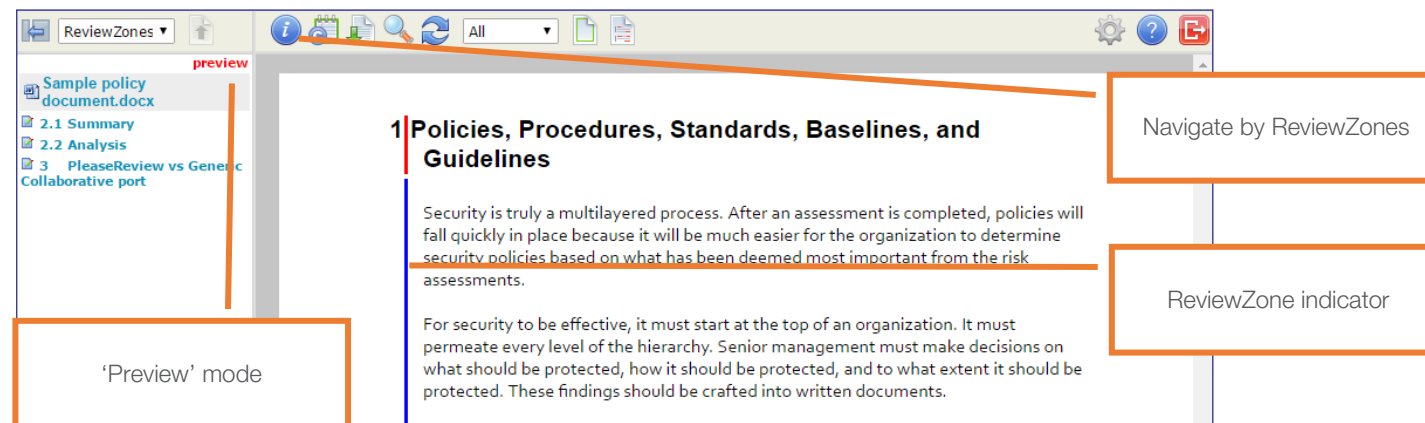
Name	Email	Permission
Ben Demo	ben.demo@pleasetech.com	Reviewer ▼
Daniel Demo	daniel.demo@pleasetech.com	Reviewer ▼

Participant permissions for the entire review can be changed at this point using the drop down list. Alternatively, permissions can be selected as the ReviewZones are setup.

Note once a review has started you can enable or disable ReviewZones via 'Edit details' in the Review Control Panel. For more information see [Review Owner Options](#).



At step 5, ReviewZones can be created by clicking the 'Preview/ReviewZones' link. This link will open the document in 'Preview' mode.



To set the first ReviewZone, click the paragraph where the ReviewZone should start. The selected paragraph will display a red line to the left which indicates the start of the ReviewZone.

Notes:

- You may select as little as a single paragraph or as much as the whole document to be a ReviewZone;
- PleaseReview may select associated paragraphs (if, for example, you start the ReviewZone at a heading level) to be included in the zone. These will be indicated by a blue line to the left of the paragraph (see [Automatic Selection Rules](#)).

Review Set Up



The comment window will open with the 'Zones' tab automatically selected. If the review contains both ReviewZones and EditZones, ensure 'ReviewZones' is selected in the Type drop-down at the top of the window.

At this point, the end point of the ReviewZone can be set and the ReviewZone permissions assigned:

The screenshot shows the 'Zones' tab for a document titled 'Sample policy document.docx'. The 'Type' dropdown is set to 'ReviewZones'. The 'paragraph range' is '1 to: 11', with an '[Edit]' link next to it. The 'Title' field contains '1 Policies, Procedures, Standards, Baselines,'. Below the title is an 'Optional description' field. A checkbox 'Make read only for everyone' is present. A table lists users: Ben Demo, Daniel Demo, and Ephraim Demo, each with an email address. A 'Permission' dropdown menu is open, showing options: Reviewer, Viewer, Hidden, and Reviewer. The 'Reviewers' button is highlighted. The bottom of the window has 'OK', 'Close', and 'Cancel' buttons. Navigation links at the bottom show 'reviewzones' is selected.

Annotations:

- Ensure 'ReviewZones' selected
- ReviewZone range selected
- Click 'Edit' to change the ReviewZone range
- Permission settings for selected ReviewZone



The drop down list of permissions available for each participant is dependent on their role in the review:

Permission	Effect
Reviewer	Can add comments/proposed changes as normal.
Viewer	Read-only access to this ReviewZone.
Hidden	Unable to see the ReviewZone.
Author	Can accept/close comments on this ReviewZone.

To change the end range of the selection click on the 'Edit' link and then click on the paragraph in the document where the ReviewZone should end. To reset the start paragraph simply cancel the entire ReviewZone and start again, by clicking on the new start paragraph.

Notes:

- ReviewZones can be created once the review has already started. However, to avoid user confusion we recommend that they are set up before starting the review;
- The ReviewZone title is pre-populated from the document's contents. It may be over-typed;
- The description is optional;
- The drop-down box includes a list of all permissions available for that participant;
- ReviewZones are identified in the document by a vertical yellow line in the left hand margin;
- ReviewZones may not overlap and must be on discrete parts of the document;
- ReviewZones and EditZones can co-exist in the same document but may not overlap. However, a single zone may be both a ReviewZone and an EditZone.

Once created, ReviewZones are visible in the left hand navigation pane when navigating by ReviewZones.



8.2 Managing ReviewZones

It is possible to set ReviewZones once the review has started, or add more ReviewZones. Once set, the review Owner can also edit or delete zones using the 'Zones' tab of the comment window.

To delete a ReviewZone, simply click 'Delete'. To change the range of a ReviewZone, or change participant permissions, click 'Edit'. The comment window will update to enable editing and all options available when setting ReviewZones will be available.

A screenshot of the 'ReviewZones' management interface. At the top, there is a 'Type' dropdown menu set to 'ReviewZones'. Below this is a form with fields for 'Type' (set to 'ReviewZones'), 'Title' (set to '1 Policies, Procedures, Standards, Baselines,'), 'Paragraph range' (set to '1 to: 11'), and 'Description'. Below the form is a checkbox labeled 'Make read only for everyone' which is unchecked. Underneath the checkbox is a table with four columns: 'Name', 'Email', and 'Permission'. The table contains four rows of data for participants: Ben Demo, Caleb Demo, Daniel Demo, and Ephraim Demo. At the bottom of the interface are two buttons: 'Delete' and 'Edit'. An orange arrow points from a text box to the 'Delete' button.

Type	Title	Paragraph range	Description
ReviewZones	1 Policies, Procedures, Standards, Baselines,	1 to: 11	

Make read only for everyone ☐

Name	Email	Permission
Ben Demo	ben.demo@pleasetech.com	Reviewer ▼
Caleb Demo	Caleb.Demo@pleasetech.com	Reviewer ▼
Daniel Demo	daniel.demo@pleasetech.com	Viewer ▼
Ephraim Demo	ephraim.demo@pleasetech.com	Hidden ▼

Delete **Edit**

Use the 'Delete' and 'Edit' buttons to manage ReviewZones

8.3 ReviewZones and Delegation

If a review participant uses [Simple Delegation](#) to delegate their role on a review to another user they delegate all their permissions. This means that the new participant will have the original participant's ReviewZone permissions transferred to them.

If a review participant uses [Managerial Delegation](#) to add new participants to a review, all new participants will be given Reviewer or Viewer permission in the review as a whole, dependent on the permissions of the review participant who added them to the review. They will also have the original participant's ReviewZone permissions replicated for them.



9 ReviewFlow™ Multi-Phase Reviews

ReviewFlow™ provides additional flexible review workflows with options for sequential, multi-phase reviews in which each phase may be collaborative or independent.

Options allow automatic or manual transition from one phase to another. The Owner receives a consolidated view of comments and may select which comments transition between phases while retaining complete records of separate individual phases.

9.1 ReviewFlow™ Approach

Each phase in a multi-phase review is an individual review in its own right. Thus a multi-phase review is essentially a collection of individual reviews which are managed centrally by the Owner, and on which the Owner has a consolidated view. This has several advantages and consequences:

- Each phase is a separate review and can have separate Reviewers. If a Reviewer is in multiple phases, the phases will appear as separate reviews in the Reviewer's inbox. However, Phase 2 (for example) will not appear until Phase 1 is complete and is listed under 'Completed reviews';
- All review options are available and apply individually to each phase. Thus a review could, for example, be collaborative for one phase and independent for another phase. Offline review could be enabled for one phase and not for another, and so on.



9.2 Multi-Phase Review Set Up

Setting up a multi-phase review is enabled by selecting the multi-phase option on the first screen of the new review wizard.

At step 3, the ReviewFlow set-up is the specification of review options. This includes the defaults for review progression between the stages. These defaults may be over-ridden for each individual phase.

The review progression options include automatic progression from phase to phase, and which comments should be included in the next phase.

new review step 3 : review options

Review Options | Email Options | ReviewZone Options

Review progression

Progress automatically to the next phase
1) You can always progress the review manually using the closeout screen regardless of these settings
2) A review cannot progress to next phase until all EditZones are completed or deleted

☐ When all reviewers indicate they are complete
☐ When the end date is reached

Transfer comments from one phase to the next

☐ All
☐ Only accepted comments
☒ None

The review Owner is able to progress the review to the next phase manually by using the Review Control Panel. But they can also elect to have the review progress automatically to the next phase when either all Reviewers have indicated that they have completed their review (i.e. all Reviewers have set their status to 'Completed'), and/or the review end date is reached. If both options are selected, the review will progress on the first event.

Notes:

- A review cannot progress to the next phase until all EditZones are either completed or deleted;
- If the review includes participants with the role of 'Viewer', this role is not considered during automatic progression to the next phase.

The review Owner can select which comments are included in the new phase, using the options available:

Comment Selection	Description
All	All comments included in the phase are included in the subsequent phase, even if they are made by a Reviewer who is not included in the subsequent phase.
Only accepted comments	Only accepted comments and changes are included in the subsequent phase.
None	No comments or changes are included in the subsequent phase.



Email options and ReviewZone options are the same as for a standard review. Note, however, that ReviewZones are specific to each phase (see [ReviewZones](#) for more information).

The final step of the multi-phase review set-up wizard is the creation of the phases.

Selecting 'Add' will add a phase.

It is recommended that you add all phases prior to editing them to set details. Note that you cannot add or remove phases after the review set up is complete.

The Owner is then able to edit each phase to specify the participants and to overwrite (if required) the review options for each phase. Specifying participants is the same process as in a standard review set-up.

The documents can also be previewed and EditZones or ReviewZones set up before the review is started. See [Creating EditZones](#) and [ReviewZones](#) for more information.

The review options include whether (and how) the review progresses automatically from one phase to another (the Owner can always progress it manually), and which comments are transferred between the phases.

The final stage is very similar to the standard review except that the review phases are shown instead of the participants.

new review step 4: set up phases

phases

Title	Details	Participants	Review Options	Phases
No phases currently defined				
				Add

details for phase 1

Title User manual ReviewFlow phase 1

Description

Duration 2 days

Save **Cancel**

new review step 4: set up phases

phases

Title	Details	Participants	Documents	Review Options	Phases
A test review Phase 1	edit	edit	Preview	edit	remove
A test review Phase 2	edit	edit	Preview	edit	remove
A test review Phase 3	edit	edit	Preview	edit	remove
A test review Phase 4	edit	edit	Preview	edit	remove



9.3 Multi-Phase Reviews and EditZones

EditZones can only be set up in the first phase of a multi-phase review. If you attempt to add a Contributor to any other phase you will get a warning that this is not allowed.

All EditZones in phase 1 must be either deleted or completed before phase 2 can be started. All other EditZone functionality works in the same way as for a standard review (see [Creating EditZones](#)).

9.4 Multi-Phase Review Control

The Review Control Panel for a multi-phase review shows the progress of the phases rather than the individual Reviewers in each phase.

The Owner can ascertain the status of each individual Reviewer in each phase by selecting the 'details' option.

The 'closeout' link takes the Owner to the close-out screen for the phase where the previous comment selection can be overridden prior to starting the next phase.

review control panel - User manual ReviewFlow

User manual ReviewFlow (id 988)

Review Status In Progress (Due: 9 Jun 2009 14:48; Started: 1 Jun 2009 14:48)

review phases

Title	Days	Status			
User manual ReviewFlow phase 1	2	In Progress	details	enter	closeout
User manual ReviewFlow phase 2	2	Not Started	details		
User manual ReviewFlow phase 3	2	Not Started	details		
User manual ReviewFlow phase 4	2	Not Started	details		

comment summary (User manual ReviewFlow phase 1)

Document	Open	Accepted	Closed	Withdrawn
Sample policy document	0	0	0	0

Edit Details Delete Review

Back

Notes:

- Once comments have been copied between phases they are not separately identified;
- If the comments carried forward are by a Reviewer not included in the current review phase, the comments will still be credited to the Reviewer which made them. It is possible for Reviewers in the current phase to 'Reply' to the comments but the original Reviewer is unable to see the reply or join in the discussion – only Reviewers in the current phase can see the discussion and join in;
- Re-opening closed reviews is not available in multi-phase reviews (see [Closing and Completing a Review](#)).



10 Sub-Reviews

As the Owner of the review you have the ability to allow the review participants to create a 'sub-review'. Sub-reviews allow a review participant to create a new review (a sub-review) with the same documents but add their own set of review participants, adjudicate the comments and changes and then publish a sub-set of the comments and changes from the sub-review back to the master review. The review participant setting up a sub-review must be an 'Author' on the system and can set-up the sub review in any Workgroup in which they are an Author.

Owners of sub reviews are able to remove review document(s) as long as at least one review document remains, and they are able to add additional reference documents to their sub reviews.

Owners of sub reviews accept or close the comments and changes made within a sub review in normal PleaseReview fashion. They are then able to publish the accepted changes and comments back to the master review where they will appear as open comments and changes made by the sub review Owner (i.e. the master review participant).

There is an option to ensure that any changes accepted in a master review, whilst a sub review is ongoing, are merged into the sub review to ensure all participants are working on the most up-to-date version of the review document.

In order for a sub review to be created the master review Owner must enable permission at 'New review step 4':

Note: the allow sub-reviews is controlled by Workgroup configuration and therefore the allow sub-reviews may not be available in the review set up for certain Workgroups. If 'allow sub-review' has been enabled for a review, the review participant can create the sub-review from the Review Control Panel.

A screenshot of the 'Review Options' tab in the PleaseReview interface. The tab is selected and highlighted in blue. Below the tab are three sub-tabs: 'Review Options', 'Email Options', and 'ReviewZone Options'. The 'Review Options' sub-tab is active. Under the 'Review Options' sub-tab, there are several sections: 'offline settings' with two options ('Allow reviewers to download a copy of the document' and 'Allow reviewers to review documents offline'), both checked; 'independent review' with one option ('Reviewers do not see each others comments'), unchecked; 'allow proposed changes' with one option ('Allow proposed changes in review'), checked; 'allow sub-review' with one option ('Allow review participants to create a sub-review from this review'), checked; and 'auto-delete' at the bottom. The 'allow sub-review' section is highlighted with a red rectangular box.



When a participant selects to 'Create Sub-Review' they are then taken to the usual Review set up process.

From a Reviewer's perspective there is no difference between a review that is a master review and one that is a sub-review.

If the review is a sub review, the sub-review Owner will see a Publish icon located on the toolbar in the sub review. This icon is only visible to the sub-review Owner. This icon initiates a 'publish' of all accepted comments and changes to the master review where they will appear as open comments and changes made by the sub review Owner.

PleaseReview can also be configured to show the original participant name from the sub review, alongside the sub review Owner for accepted comments published to the master review.

PleaseReview keeps a record of which comments and changes have been published to the master review so it is not possible to duplicate comments and changes from the sub-review to the master review. Therefore the publish button can be used as often as is necessary. However, once a comment or change has been published to the master review it cannot be re-opened in the sub review.



Note – If the 'auto-update accepted changes' is enabled and there are accepted changes within the master review at the point of creating a sub-review, these changes will be reflected in the sub-review. The changes will show as made by 'Master review'. The sub-review participants will not be able to reopen or delete these changes.

review control panel - Document Review

Document Review (id 698)

Description

email invitation message here...

Review Status

Overdue (Due: 31 Aug 2016 11:45 PM; Started: 15 Aug 2016 5:16 PM)

participants

Name	Status	Role	Summary	Comments
Barry	In Progress	Reviewer		4
John Tanner	Not Started	Author		0
Sarah	Completed	Reviewer	summary comment	5
Zoe Wright	Review Owner	Owner		11

your comments

Document	Open	Accepted	Closed	Withdrawn
1 - Sample policy document-for demo.docx	6	8	6	0

Edit Details
Create Sub-Review

Status
Download copy
Notify
Delegate
Copy Emails

View Report
Enter Review
Back



10.1 EditZones and Sub-Reviews

The use of EditZones and sub-reviews together is not recommended or officially supported. If a review has an EditZone in it, the sub-review functionality is not available.

Important note: If a sub-review has already been created it is possible for the master review Owner to create EditZones, but only by amending a review participant's role. The use of EditZones once a sub-review has been created can lead to data loss in the sub-review and will prevent the publishing of sub-review comments and changes to the any updated EditZones in the master review. We strongly advise against the use of EditZones where sub-reviews are intended or are already underway.

10.2 ReviewZones and Sub-Reviews

The use of ReviewZones within sub-reviews is disabled. If the master review includes ReviewZone(s), they are reflected in the sub-review, however additional ReviewZones cannot be added in the sub-review. Note: If ReviewZones are added, amended or deleted within a review after a sub-review has been created, they are not reflected in the sub-review, and the original permissions apply.

10.3 Merging Changes to the Master Review

When a sub-review Owner publishes the review's accepted changes to the master review, PleaseReview will simply enter the changes into the master review as if they had been typed by the sub-review Owner. This may, of course, result in conflicting proposed changes which are handled in the normal PleaseReview way.

If the auto-update of accepted changes is not enabled, the following scenario may happen: Assume that there is an accepted proposed change in the master review which largely changes the entire paragraph text. This will not be reflected in the sub-review. Meanwhile, the sub-review Owner accepts some minor modifications to the original paragraph text. When the sub-review Owner publishes these minor modifications to the master review, it will create a new proposed change in the master review which has the effect of removing the already accepted changes in the master review and reverting the paragraph to the original text with the minor changes from the sub-review. As this is an open proposed change in the master review, the master review Owner can obviously close (i.e. reject) it where upon the previously accepted proposed change will remain as the updated paragraph text.

At first glance this reverting to the original paragraph text may seem inconsistent. However, it is a result of Reviewers working on out dated paragraph text which is a consequence of not having auto-update enabled. The resulting proposed change from the sub review is, in fact, entirely logically consistent.



10.4 Auto-Update Accepted Changes

When creating a sub-review the Owner will have the option, at step 4 of the new review wizard, to allow accepted changes in the master review to automatically be pulled down into the sub review. This effectively means that the sub-review is constantly updated to reflect the master review document.

A screenshot of a user interface element. It features a light gray rectangular box with a thin blue border. At the top left of the box, the text 'auto-update accepted changes' is written in a blue font. Below this, the text 'automatically update with accepted changes from the master review' is displayed in a standard black font. To the right of this text is a small square checkbox containing a black checkmark, indicating that the option is selected.

In the case that auto-update is enabled there are some system behaviors to be aware of:

- Sub-review has an open change and a master review change on the same paragraph and text area (i.e. which conflicts with the sub-review change) is pulled down. In this case the sub-review change is withdrawn and the master review change overrides it.
- Sub-review has an open change and master review has a non-conflicting accepted change on the same paragraph. When the master review change is pulled down, the system will update the paragraph to reflect the master review's change whilst maintaining the sub-review's open change.
- Sub-review has an accepted change. Master review has a change applied and accepted on the same paragraph which conflicts with the sub-review change. When the update occurs the accepted change from the master review will override the accepted change from the sub-review. The sub-review accepted change will be withdrawn.
- Sub-review has an accepted change and the master review has a non-conflicting accepted change on the same paragraph. When the master review change is pulled down, the system will update the paragraph to reflect the master review's change whilst maintaining the sub-review's accepted change. When the sub-review's change is published, the merged master change will also be included.



10.5 Sub-Review Closeout

When the sub-review is complete the Owner can use the review closeout process in the same way as any other review.

From within the review closeout screen the option to publish accepted changes to the master review is selectable.

The ability to Publish accepted changes is available when the review is in progress or closed only.

When the sub-review Owner completes the review, a warning message will advise that you cannot re-open it or publish any changes after completing the review.

review closeout - Document Review [Sub-review]

review details

Title	Document Review [Sub-review]
Description	email invitation message here...
Status	In Progress
End Date	8 Sep 2016 11:45 PM
Open comments	0

actions

Publish accepted changes	Publish sub-review's accepted changes to master review. Note: Ensure accepted changes are published to the master review before completing the review.
Close review	Updates the review status such that reviewers can no longer comment on the document.
Complete review	Updates the review status such that no further updates can be made.

download documents with comments marked as tracked changes

Select Comments

File name	Title	Details
1 - Sample policy document-for demo.docx	1 - Sample policy document-for demo.docx	Download

Download all documents

Back

10.6 Transferring the Ownership of a Sub-Review

It is not possible to transfer the ownership of a sub-review.

10.7 Deleting a Master Review

If the master review is delete all sub-reviews will also be deleted.



11 Subteams

Review Owners have the ability to set up Subteams within a review. This allows the review Owner to allocate their review into Subteams. In this way, participants only see comments and proposed changes made by those within their Subteam. The Owner, and any Authors in the review, see all participants' comments and proposed changes from all Subteams.

The review Owner can set up Subteams using the 'Subteams' tab at Step 4 of the new review set up:

The screenshot shows the 'new review step 4 : review options' interface. It has four tabs: 'Review Options', 'Email Options', 'ReviewZone Options', and 'Subteams'. The 'Subteams' tab is selected. Below the tabs, there is a text box for 'Subteam Name' containing 'Subteam1' and a 'Subteam Members' section. A link 'Add additional Subteam' is present. Below this is a table titled 'Participants seeing all Subteams' with columns 'Name', 'Email', and 'Role'. The table lists four participants: Helen Harris (Owner), Joe Jones (Reviewer), Mike Malone (Reviewer), and Paul Patterson (Reviewer). A 'Save' button is at the bottom right of the table. Three orange boxes with arrows point to specific elements: the first box points to the 'Subteam Name' input field, the second box points to the 'Add additional Subteam' link, and the third box points to the 'Participants seeing all Subteams' table.

Enter name of participant to add them to Subteam

Link to add additional Subteams

List of participants added to the review at Step 3

new review step 4 : review options

Review Options **Email Options** **ReviewZone Options** **Subteams**

A Subteam is a group of reviewers who can see each other's comments and changes, but cannot see comments and changes made by participants outside their Subteam. Participants not included in a Subteam can see all comments and changes from all Subteams within the review.

Subteam Name **Subteam Members**

Subteam1

[Add additional Subteam](#)

Participants seeing all Subteams

Name	Email	Role
Helen Harris	helenharrisdemo@pleasetech.com	Owner
Joe Jones	joe.jonesdemo@pleasetech.com	Reviewer
Mike Malone	mike.malonedemo@pleasetech.com	Reviewer
Paul Patterson	paulpattersondemo@pleasetech.com	Reviewer

Save

Previous **Next**



To add participants to a Subteam, the review Owner should start typing the name of the participant in the 'Subteam Members' text box. PleaseReview will automatically provide a list of available users to select from.

new review step 4 : review options

[Review Options](#) [Email Options](#) [ReviewZone Options](#) [Subteams](#)

A Subteam is a group of reviewers who can see each other's comments and changes, but cannot see comments and changes made by participants outside their Subteam. Participants not included in a Subteam can see all comments and changes from all Subteams within the review.

Subteam Name	Subteam Members
Subteam1	Joe Jones <input type="button" value="x"/> Mike Malone <input type="button" value="x"/>
Subteam2	Paul Patterson <input type="button" value="x"/>

[Add additional Subteam](#)

Participants seeing all Subteams

Name	Email	Role
Helen Harris	helenharrisdemo@pleasetech.com	Owner

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

Subteam name can be overtyped

Participants in the review that can see all comments and changes from all participants

The name of the Subteam can be changed by simply overtyping the default name (i.e. 'Subteam1').

Once the required members have been added to a Subteam, click 'Save' to save the changes.



At step 5 of the review set up, the Subteams will be visible in the 'participants' section:

Name of Subteam to which
participant is assigned

new review step 5: verify details and start review or put it on hold

review details [Edit](#)

Title	Employee Handbook
Description	
Status	Not Started
End Date	30 Jan 2017 23:45

participants [Edit](#)

Name	Email	Role
Helen Harris	helenharrisdemo@pleasetech.com	Owner
Joe Jones [Subteam1]	joe.jonesdemo@pleasetech.com	Reviewer
Mike Malone [Subteam1]	mike.malonedemo@pleasetech.com	Reviewer
Paul Patterson [Subteam2]	paulpattersondemo@pleasetech.com	Reviewer

documents [Edit](#)

File name	Title	Preparation	
Staff Handbook_v0.1.docx	Staff Handbook_v0.1.docx	Successful	Preview

[Delete Review](#) [Review Options](#)

[Put Review on Hold](#) [Start Review](#)

Notes:

- Only participants added to the review at Step 3 of the review set up can be added to a Subteam;
- Reviewers can be added to multiple Subteams;
- From a Reviewer's perspective there is no difference between a standard review and one in which they are part of a Subteam;
- Any participants not added to a Subteam will be able to see all comments and proposed changes made by all participants.



11.1 Subteams and Independent Review

If the 'Independent Review' option is enabled at Step 4 of the new review set up, and Subteams are also enabled within the same review, then the independent review option will override the Subteam feature. This means that, regardless of the Subteams enabled, all Reviewers will not be able to see each other's comments and proposed changes.

The Owner's experience remains unchanged and they can see all comments and proposed changes from all participants in the review.

Note: Both Subteams and independent review options relate to Reviewers only. The review Owner, and any Authors in the review, will always be able to see all participants' comments and proposed changes from all Subteams and all independent reviewers.

11.2 Subteams and Multi-Phase Reviews

The Subteams feature within PleaseReview is compatible with multi-phase reviews. Therefore, one or more phases in a multi-phase review can have Subteams enabled.

The Subteams can be set up at each phase of a review at Step 4 of the new review set up process.

Chapter Four

The Review Interface

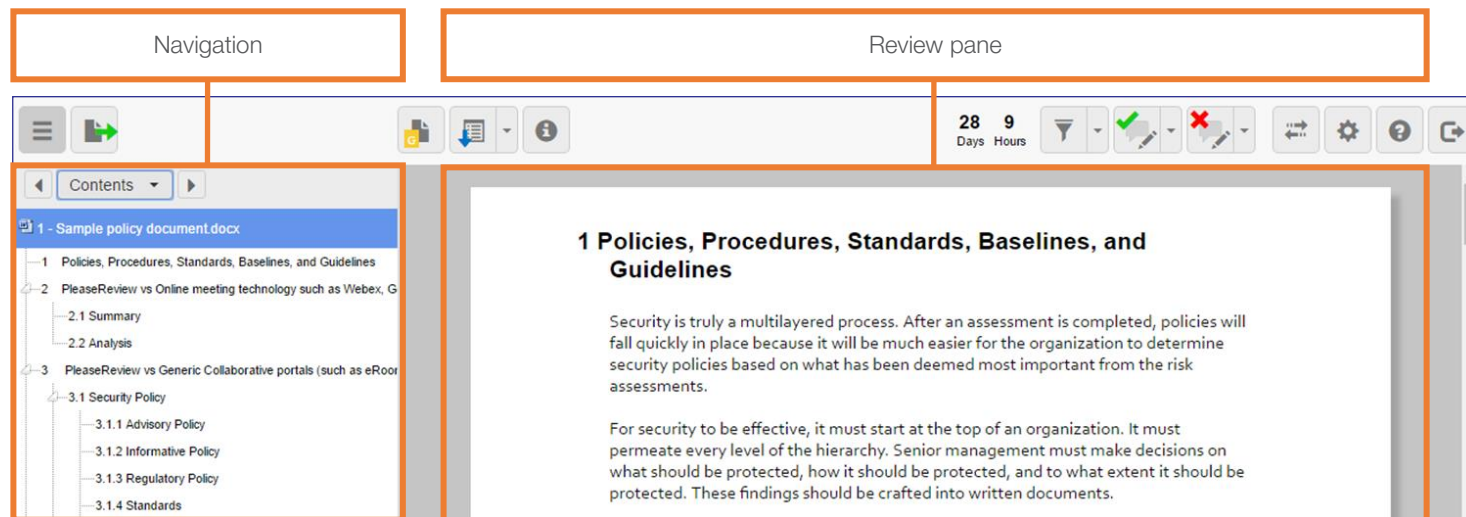
12	The Review Environment in V6.1	84
13	The Review Environment in the Classic Interface	93



12 The Review Environment in V6.1

This section relates to the V6.1 PleaseReview interface. If you are configured to use the PleaseReview classic interface, please refer to [The Review Environment in the Classic Interface](#).

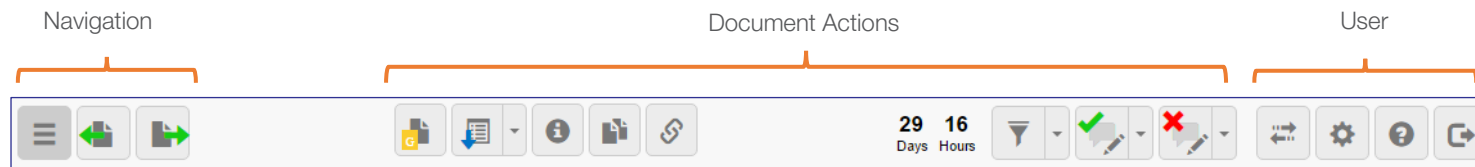
When you enter a review the body of the document is viewed in the review pane, which is the main part of the window. The navigation pane on the left allows you to navigate the document.



There is a toolbar across the top of the window which provides functions required for user interaction.



12.1 Toolbar



12.1.1 Navigation

Icon	Description
	Show/hide the navigation pane.
	Navigates to the next document. If this icon is not displaying on the toolbar there are no other documents in the review.
	Navigates to the previous document. This icon will only display on the toolbar if there is a document before the current document.
	The drop-down box allows you to select whether navigation is by 'Contents' or 'Comments'. A PDF document allows navigation by 'Bookmarks' or 'Comments'. The arrows either side of the drop-down box can be used to jump to the next item in the navigation pane (i.e. the next/previous comment, when navigating by comments).

Notes:

- The navigation pane will show a list of all documents in the review. Navigation of the document in the review pane is expanded;
- To select other documents in the list (if any) click on their title.

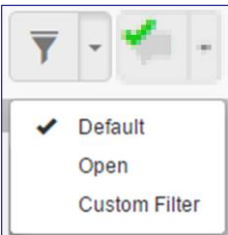

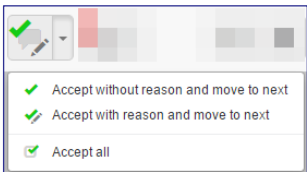

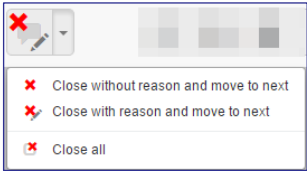


12.1.2 Document Actions

Icon	Description
	Add a general comment.
	Download and reporting - provides access to the reconciliation report, and document downloads (if available).
	'View report' opens the reconciliation report in a new browser window/tab.
	'Download original document' opens a read-only copy of the original document. Note: This option will only be available if the review Owner has enabled it as part of the review set up.
	'Download with comments' opens a list of documents in the review available to download. Participants can download the document with comments (Word, Excel and PDF only). Note: This option will only be available if the review Owner has enabled it as part of the review set up.
	Opens the review information. This is a read-only version of the Review Control Panel which simply displays the information associated with the review. No actions are available from this view.
	Document comparison (if available). See Document Comparison and Review Linking .
	Linked review (if available). See Document Comparison and Review Linking .
	Displays the time remaining until the end of the review.
	'Show/hide annotations' allows you to display or not display PDF annotations (PDF documents only).
	'Toggle filter' - filter which comments are displayed. Clicking the icon when a filter is applied turns the filter off.





The Review Interface



Icon	Description
	<p>'Default' shows all comments and changes with no filter applied.</p> <p>'Open' shows only open comments and changes in the navigation pane and in the document display. Note: Accepted changes are still displayed in the document pane so you are working on an up to date document, however the associated comments are not displayed. The icon color will change to green to indicate a filter is applied.</p> <p>'Custom filter' allows you to display a customized selection of comments and proposed changes to display. The icon color will change to green to indicate a filter is applied. See Custom Filter.</p>
	<p>'Accept' icon allows you to accept a comment or change and move to the next open comment/change with or without giving a reason based on your selection. Note: This icon is only visible to the review Owner and any Author(s) in the review.</p>
	<p>'Accept without reason and move to next' allows you to accept a comment or change without giving a reason and move to the next open comment/change. See Accepting and Closing using the Toolbar.</p> <p>'Accept with reason and move to next' allows you to accept a comment or change with a reason and move to the next open comment/change. See Accepting and Closing using the Toolbar.</p> <p>'Accept all' allows you to accept all comments and changes at once. See Accept/Close All.</p>
	<p>'Close' icon allows you to close a comment or proposed change and move to the next open comment/change with or without giving a reason based on your selection. Note: This icon is only visible to the review Owner and any Author(s) in the review.</p>
	<p>'Close without reason and move to next' allows you to close a comment or change without giving a reason and move to the next open comment/change. See Accepting and Closing using the Toolbar.</p> <p>'Close with reason and move to next' allows you to close a comment or change and provide a reason before moving to the next open comment/change. See Accepting and Closing using the Toolbar.</p> <p>'Close all' allows you to close all comments and changes at once. See Accept/Close All.</p>



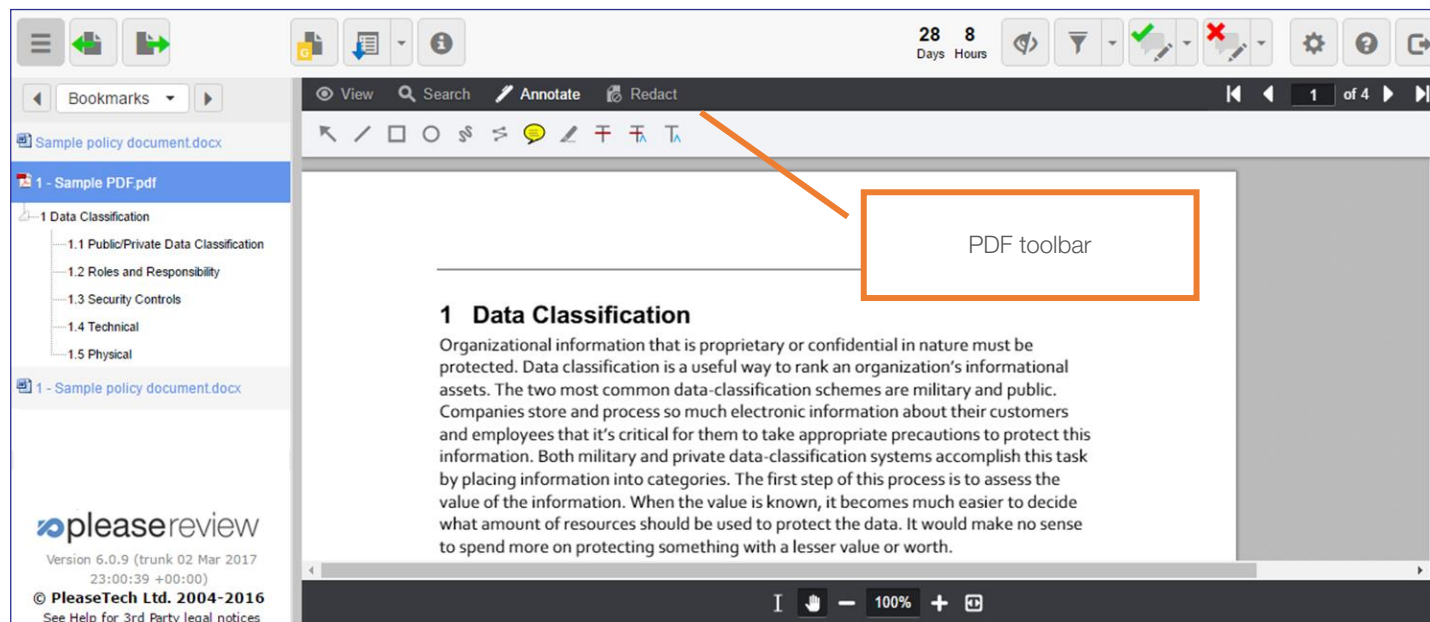
12.1.3 User Actions

Icon	Description
	Switch interface allows you to switch between the new V6.1 and the classic review interface.
	User settings. See V6.1 Review User Settings .
	Help – Access to the user manual, training movies and other support materials.
	Leave the review. See Leaving the Review .




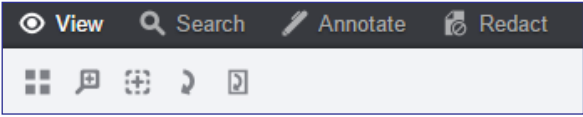

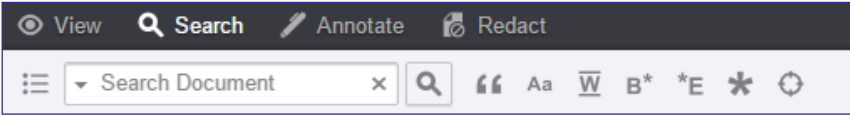

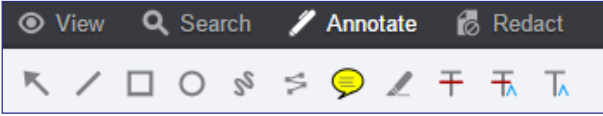

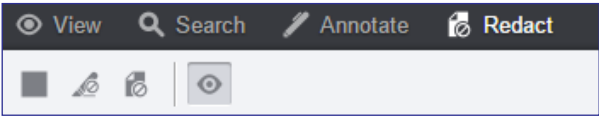
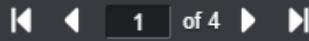

12.2 PDF Toolbar

When a PDF document loads in the review interface, an additional PDF toolbar will be made available:



The Review Interface



Toolbar Option	Toolbar Detail
	 <p>The view tools provide the ability to zoom, pan and rotate the document.</p>
	 <p>The search tools provide the ability to search a PDF using exact match, whole word, match case, begins with, ends with, wildcards, and proximity search (see Search).</p>
	 <p>The annotation tools provide the ability to insert, replace and delete text, apply sticky notes, highlight content and drawing options. To lock a tool, double click on the icon allowing you to create many annotations of the same type. Note: Annotation tools are system configurable and therefore may not be available.</p>
	 <p>The redaction tools provide the ability to redact a PDF using text selection, rectangle or full page(s). Note: Redaction tools are system configurable and therefore may not be available.</p>
	Page navigation tools are available in the top right of the toolbar.
	At the bottom of the review pane, additional pan and zoom tools are available.



12.3 Custom Filter

'Custom filter' allows you to display a customized selection of comments in a review.

Comment Selector

Select comments by:

Status

☒ All ☒ Closed ☒ Merged
☒ Accepted ☒ Open

Type of comment

☒ All ☒ General ☒ Comment
☒ Proposed Change

Comment category

☒ All ☒ Minor ☒ Typo
☒ Major ☒ Cosmetic ☒ <blank>

Participant

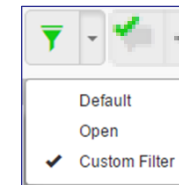
☒ Made a comment ☐ Participated in discussion

☒ All ☒ Helen Harris ☒ Joe Jones
☒ Mike Malone

Date

☒ All
☐ Since I entered the review 19 Oct 2016 11:08 ▲
☐ Since 00 ▲ 00 ▲

Reset Apply Cancel



Selecting the custom filter option opens a new window which allows you to select which comments are displayed.

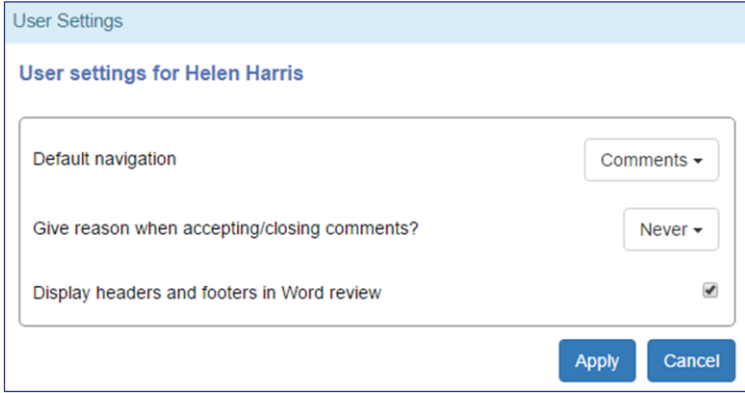
Once applied, the comments shown in the review pane and the navigation pane will reflect the customized selection. The icon color also changes to green to indicate a filter is applied.

Drop-down reveals the last five times the user entered the review



12.4 V6.1 Review User Settings

The PleaseReview V6.1 interface provides a different set of user settings to those provided on the PleaseReview home screen and in the classic review interface. These settings are specific to the V6.1 review environment and allow you to change your personal preferences, your default Workgroup, and your password (if permitted):

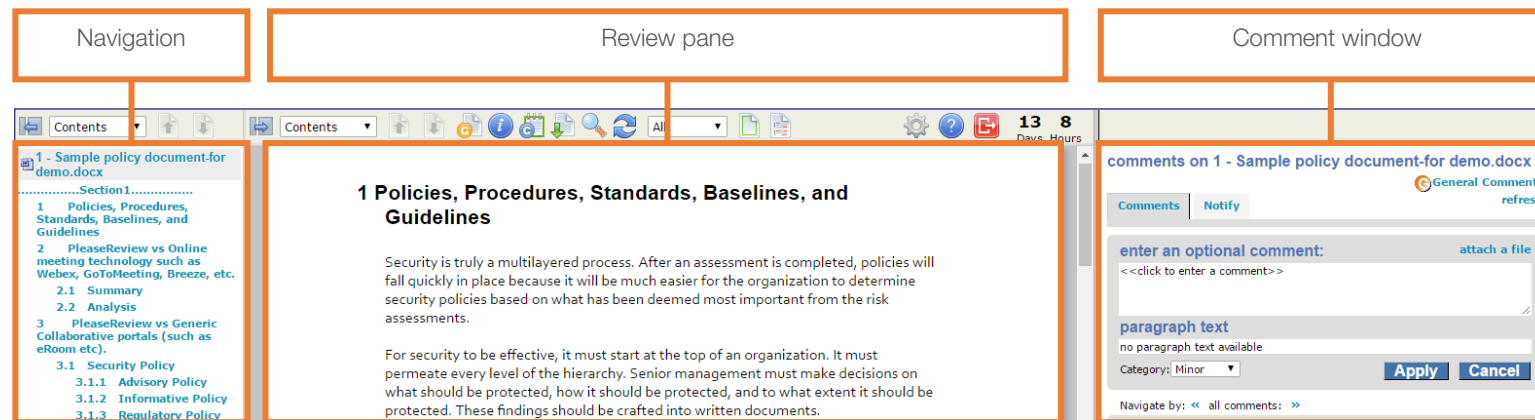
 The image shows a 'User Settings' dialog box for user Helen Harris. It contains three settings: 'Default navigation' set to 'Comments', 'Give reason when accepting/closing comments?' set to 'Never', and 'Display headers and footers in Word review' which is checked. There are 'Apply' and 'Cancel' buttons at the bottom right.	
User Setting	Description
Default navigation	The default view of the navigation pane.
Give reason when accepting/closing comments?	This option is only relevant to Authors. Never - Authors can accept/close comments with one click. Close only - Authors are only prompted for a reason when closing comments and changes. Always - Authors are always prompted for a reason when accepting or closing comments and changes.
Display headers and footers in Word review	Defines the default view for Word documents. When checked, the document displays with headers and footers.



13 The Review Environment in the Classic Interface

This section relates to the PleaseReview classic interface. If you are configured to use PleaseReview V6.1, refer to [The Review Environment in V6.1](#).

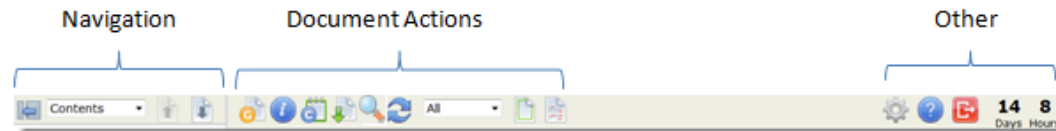
When you enter a review the body of the document is viewed in the review pane, which is the main part of the window. The navigation pane on the left allows you to navigate the document. The comment window is where you make comments and proposed changes. It can be set to display on the right of the document (as shown), the left of the document, or as a pop-up (which is the default setting). You can set your location preference in your user settings.



There is a toolbar across the top of the window which provides functions required for user interaction.



13.1 Toolbar



13.1.1 Navigation

Icon	Description
	Minimizes the navigation pane.
	Maximizes the navigation pane.
	The central drop-down box allows you to select whether navigation is by 'Contents', 'Comments', 'Bookmarks', 'EditZones' or 'ReviewZones'.
	Navigates to the next/previous document. If the icon is grayed out there is no document before/after the current document.

Notes:

- The navigation pane will show a list of all documents in the review with the navigation of the displayed document in the review pane expanded;
- To select other documents in the list (if any) click on their title (document titles have a light gray background);
- Clicking on the item in the navigation pane will scroll the document to the correct location and open the comment window.







13.1.2 Document Actions

Icon	Description
	Add a general comment or view the general comments of others.
	Opens the review information in a new browser window/tab. This is a read-only version of the Review Control Panel which simply displays the information associated with the review. No actions are available from this view.
	Opens the reconciliation report in a new browser window/tab.
	Opens a copy of the original document. This is the same as downloading a copy of the document. By default the document will be 'read only'. Note: This icon will only be available if the review Owner has enabled it as part of the review set up.
	Opens 'Find' in a new browser window/tab. This allows you to search for specific words or phrases. See Find .
	Refreshes the document. This will re-load the document and all comments from the server.
	The drop-down box allows the selection of which comments are displayed. Options are 'All', 'Open Comments' or 'Custom'. Custom can be used to display a customized selection of comments. See Custom Comment Selection .
	Switch Layout View. This provides the option to select between normal view and layout view. See View Options .
	Switch Tracked Changes View. This provides the option to turn the 'open' or 'accepted' tracked changes views on and off.
	Document comparison and linking (if available). See Document Comparison and Review Linking .



13.1.3 Other Actions

Icon	Description
	User settings. See User Settings .
	Help – Access to the user manual, training movies and other support materials.
	Leave the review. See Leaving the Review .
	Displays the time remaining until the end of the review.



13.1.4 User Settings

The user settings icon on the top menu of the home screen allows you to change your personal preferences:

The screenshot shows the 'user settings' window for Helen Harris. It has a dark blue header with a logo and two tabs: 'Profile' and 'Review'. The 'Review' tab is active. Below the header, the title 'user settings' is followed by 'user settings for Helen Harris'. The main content area is titled 'review preferences' and contains a table of settings. At the bottom right are three buttons: 'OK', 'Apply', and 'Close'.

Automatic refresh	<input checked="" type="checkbox"/> 60 Interval in second(s)
Give reason when accepting/closing comments (authors only)?	Never ▼
Highlight Paragraph	<input type="checkbox"/>
Location of comments panel	Right of document ▼
Default view	Layout View ▼
Show tracked changes in document view	Show open changes as tracked ▼
Default navigation	Comments ▼
Legacy PDF review	Review as image ▼
Inline editing and Paragraph Toolbar settings	Toolbar Only ▼
Show page borders for Word documents	<input checked="" type="checkbox"/>

The Review Interface



User Setting	Description
Automatic refresh	When selected (if available) the comments and changes on the document under review will automatically be refreshed at the interval specified or when you add a comment or proposed change. Note: The default refresh time is the minimum. You can specify a slower refresh time but not a faster one.
Give Reason?	This option is only relevant to Authors. Never - Authors can accept/close comments with one click. Close only - Authors are only prompted for reasons when closing comments and changes. Always - Authors are always prompted for reasons when accepting or closing comments and changes.
Highlight Paragraph	Replaces comment icons with paragraph highlighting for Microsoft Word and plain text documents (classic interface only).
Location of comments panel	Defines the location of the comments panel in the classic review interface. This can be a pop-up window or a pane to the left or right of the document (classic interface only).
Default view	Defines the default document view in the classic review interface. Normal - displays the entire document without headers or footers. Layout - displays the document one section at a time with headers and footers.
Show Tracked Changes in document view	Defines the tracked changes document view in the classic review interface. Show open changes as tracked - displays the mark-up of open proposed changes (accepted changes will always be shown regardless of any comment filters selected). Show accepted changes as tracked - displays the mark-up of accepted proposed changes.
Default navigation	The default view of the navigation pane.
Legacy PDF review	If available, defines the method of commenting on a PDF in the classic review interface.
Inline editing and Paragraph Toolbar settings	If available, enables inline editing for proposed changes and one-click functionality to insert private bookmarks in the classic review interface.
Show page borders for Word documents	Displays the outline of the pages and page breaks in the browser (classic interface only).



13.2 View Options

There are two view options: 'Normal View' and 'Layout View'.




Document Type	Normal View	Layout View
Word	<p>Normal view can be thought of as equivalent to the 'Normal' view in Microsoft Word.</p> <p>The document's header and footer are not shown.</p> <p>The navigation pane displays all heading levels included in the selected document with section breaks shown.</p>	<p>Layout view is similar to 'Print Layout' view in Microsoft Word.</p> <p>The document is displayed on section-by-section basis.</p> <p>The section's header and footer are shown and it is possible to switch between the different header and footer styles (i.e. odd/even, etc.).</p> <p>The navigation pane displays heading levels on a section-by-section basis. Select the next section to display it.</p> <p>Where the headers and footers contain page numbers, the number displayed will always be the page number at the start of the section, regardless of the length of the section.</p>
Excel	N/A	<p>Layout view displays one worksheet at a time.</p> <p>The navigation pane lists each worksheet.</p>
PowerPoint	<p>Displays all slides with slide notes below each slide. Navigation pane displays all slides by title.</p>	<p>Layout view displays one slide at a time. This can be useful if you have a long presentation, a slow connection or wish to refresh regularly.</p>
Plain Text	<p>Displays the document.</p>	<p>Layout view provides a split screen option which enables the Reviewer to navigate to two different places in the same document at once.</p> <p>Either screen area may be used for commenting. When you navigate using the navigation pane or comment window, the top pane is scrolled to the correct location. The comment window will reflect the line most recently selected.</p>
Image Collection	<p>Normal view displays all images on the same page with a separator between them.</p>	<p>Layout view displays one image at a time. This can be useful if you have a large image collection, a slow connection or wish to refresh regularly.</p>



13.3 Tracked Changes Options

There are two view options for displaying tracked changes/mark up in the document: 'Tracked Changes (Open)' and 'Tracked Changes (Accepted)'.

These options are only available for Word and Excel documents.

Tracked Changes (Open) View	Tracked Changes (Accepted) View
<p>Open proposed changes (i.e. not accepted or closed) show as tracked changes.</p> <p>Tracked changes display in colored text with deleted text struck through and inserted text underlined.</p> <p>Changes applied by different Reviewers display in different colors.</p>	<p>Open proposed changes (i.e. not accepted or closed) do not appear as tracked changes.</p> <p>The  icon indicates a paragraph with an open proposed change.</p>
<p>Accepted proposed changes show as inserted text (the document text is updated with the accepted proposed change).</p> <p>The  icon indicates a paragraph with an accepted proposed change.</p>	<p>Accepted proposed changes show as tracked changes.</p> <p>Tracked changes display in colored text with deleted text struck through and inserted text underlined.</p> <p>Changes applied by different Reviewers display in different colors.</p> <p>The  icon indicates a paragraph with an accepted proposed change.</p>



13.4 Custom Comment Selection

Selecting to display by 'Custom' comment selection opens a new window which allows you to select which comments are displayed. The comment icons shown in the document and the comments shown in the navigation pane will reflect the comment selection.

Select comments by:

Status	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Closed <input checked="" type="checkbox"/> Accepted <input checked="" type="checkbox"/> Open																																																								
Type of comment	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> General <input checked="" type="checkbox"/> Comment <input checked="" type="checkbox"/> Proposed Change																																																								
Comment category	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Minor <input checked="" type="checkbox"/> Major <input checked="" type="checkbox"/> Cosmetic <input checked="" type="checkbox"/> <Blank>																																																								
Participant	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> dave <input type="radio"/> Made a comment <input checked="" type="checkbox"/> dave2 <input type="radio"/> Participated in discussion																																																								
Date	<input checked="" type="radio"/> All <input type="radio"/> Since I entered the review 6 May 2010 11:02 <input type="button" value="v"/> <input type="radio"/> Since: date : <input type="text" value=""/> time : <input type="text" value="00"/> <input type="text" value="00"/> <table><tr><td colspan="7">< May 2010 ></td></tr><tr><td>Mon</td><td>Tue</td><td>Wed</td><td>Thu</td><td>Fri</td><td>Sat</td><td>Sun</td></tr><tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td></tr><tr><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td></tr><tr><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td></tr><tr><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr><tr><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td></tr><tr><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td></tr></table>	< May 2010 >							Mon	Tue	Wed	Thu	Fri	Sat	Sun	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6
< May 2010 >																																																									
Mon	Tue	Wed	Thu	Fri	Sat	Sun																																																			
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3	4	5	6	7	8	9																																																			
10	11	12	13	14	15	16																																																			
17	18	19	20	21	22	23																																																			
24	25	26	27	28	29	30																																																			
31	1	2	3	4	5	6																																																			

[Return to default](#)

Drop-down reveals the last five times the user entered the review

Chapter Five

Reviewing

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14 Reviewing Documents in V6.1

This section relates to reviewing documents in the PleaseReview V6.1 web interface. If you are configured to use the PleaseReview classic interface, refer to [Reviewing Documents in the Classic Interface](#). For information regarding reviewing documents offline, see [PleaseReview Offline](#).

Note: The user roles covered in this manual describe the default functionality available to those roles. It is possible for the System Administrator to define User Types which may mean that some of the functionality described here is not available to you. You can check your User Type and available functionality on the profile tab of the user settings (see [User Settings](#)).

14.1 Reviewing Word

14.1.1 Adding Comments and Proposed Changes

Comments and proposing changes are made inline within the document. Proposed changes can be made to text directly in the document and comments can be entered in the text box area. A category can be selected, if required.

To add a comment or make a proposed change, simply click on the text in the document to activate the inline editor:

The screenshot shows the inline editor interface for a document titled "1 Policies, Procedures, Standards, Baselines, and Guidelines". The document text is "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 callout points to the text, stating "Clicking on the text allows a proposed change to be made inline". Below the text is a comment entry area with the placeholder "Enter your comment here...". A callout points to this area, stating "Comments can be entered here". Below the comment area is a category dropdown menu set to "Minor" and a text field containing "00000003". A callout points to the category dropdown, stating "Categorize comment/change". To the right of the comment area is a menu icon (three horizontal lines). A callout points to this icon, stating "Formatting options and paragraph history can be opened from this icon". At the bottom of the editor are "Apply" and "Cancel" buttons. Below the editor, the text "For security to be effective, it must start at the top of an organization. It must permeate every level of the hierarchy. Senior management must make decisions on" is visible.



Proposed changes can be made to text directly in the document and comments can be entered in the text box area. A category can be selected, if required. Clicking 'Apply' applies the comment or proposed change.

Comments can be made to specific text by selecting the text in the document and releasing. This opens the inline editor with the selected text highlighted allowing a comment to be entered. The text the comment relates to is then highlighted in the document:

4.5 Security Controls

The objective of security controls is to enforce the security mechanisms the organization has developed. Security controls can be administrative, technical, or physical. With effective controls in place, risks and vulnerabilities can be reduced to a **tolerable level**. Security controls are put in place to protect confidentiality, integrity, and availability.

C Helen Harris 20 Oct 2016 7:26 #13
Category: Minor

Should be consistent with the risk assessment.

Once applied, all comments and proposed changes are displayed in the comment box to the right of the document and proposed changes will display as mark up in the document. See [Document Mark Up and Icons](#).

Notes:

- Comments can be applied to as little as one character, or as large as one paragraph;
- The comment box to the right of the document can be compressed by clicking the 'P' or 'C' icon in the top left corner. Clicking the icon again will expand the comment box to display all information;
- General comments can be applied to the whole document using the general comments icon on the toolbar (see [Toolbar](#));
- Any headers and footers display within the page.



14.1.2 Comment Categorization

If enabled, Reviewers may categorize a comment or proposed change. This is achieved by selecting the comment category from the drop-down box:

A screenshot of a web interface for comment categorization. At the top, there is a text area containing the 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." Below this text area is a label "Enter your comment here..." followed by a text input field. To the right of the input field are two buttons: "Apply" and "Cancel". Below the input field is a drop-down menu currently showing "Minor". The drop-down menu is open, showing a list of options: "Minor", "Typo", "Major", "Cosmetic", and "<blank>". The entire interface is enclosed in a light gray border.

Notes:

- Comment categories are system configurable and therefore may not be present or the list displayed may be specific to your system;
- Comment categories can be edited/added by your System Administrator;
- Comment categorization can be mandatory. If categorization has been made mandatory you will not be able to apply your comment or proposed change until you have selected a category.

14.1.3 Features Presented in the Classic Interface Only

If a Microsoft Word review contains ReviewZones or EditZones, the review will be presented in the classic interface only.



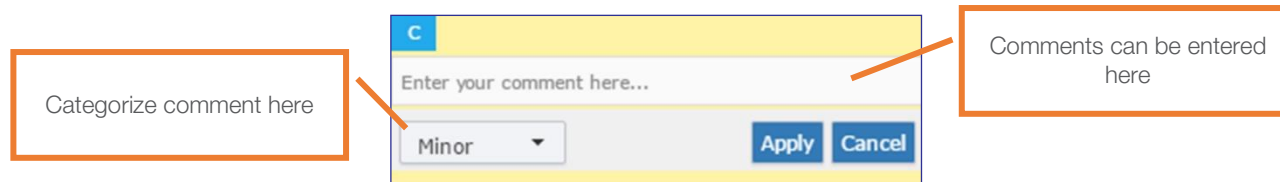
14.2 Reviewing PDF

In PleaseReview V6.1, PDF's are presented in the new review interface which provides a full annotation experience within the browser without the need for any additional software or plugins.

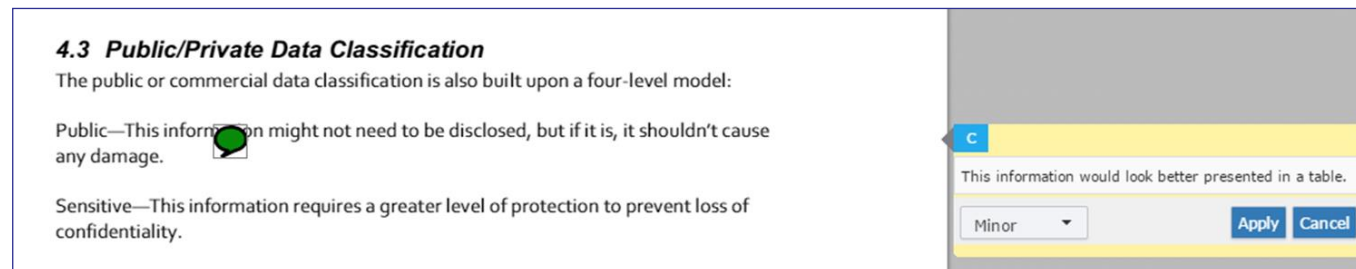
14.2.1 Adding Comments to a PDF

Comments and proposed changes can be made using one of the many annotation tools available. Select the 'Annotate' on the top pane of the toolbar, then select the required annotation tool.

To add a comment, use any of the drawing tools, the sticky note or text highlighter tool. Simply select the required tool then apply it to the relevant area of the PDF document. A new comment box will appear to the right of the document allowing the comment text to be added, and a comment category to be applied (if required):



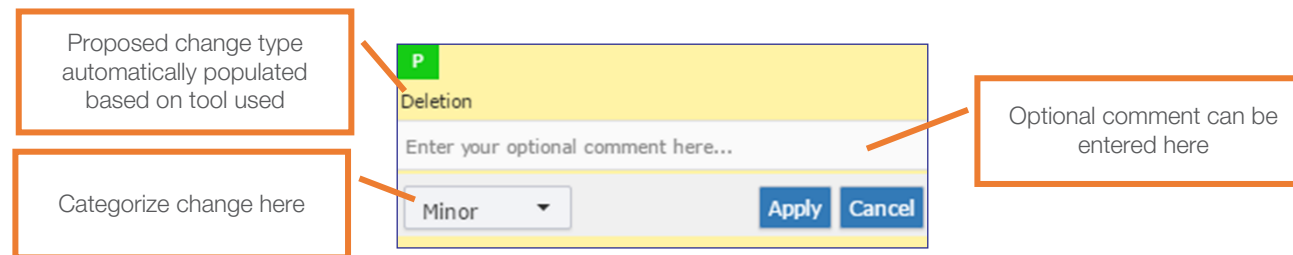
Below is an example of the sticky note tool being used to add a comment:



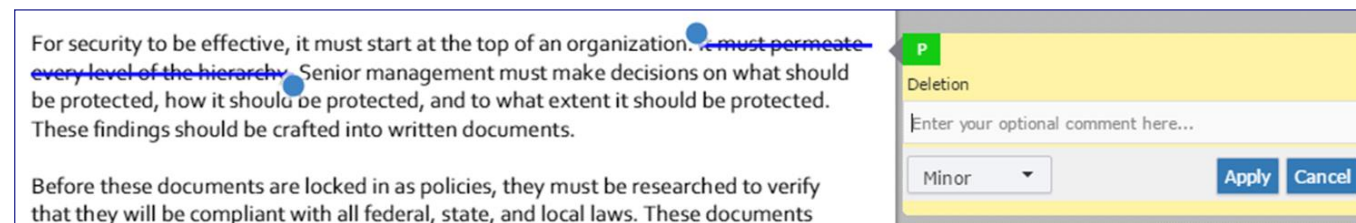


14.2.2 Making Proposed Changes to a PDF

To propose a change to a PDF, use the replace text, insert text and delete text options. Simply select the required tool then apply it to the relevant text in the PDF document. A new proposed change box will appear to the right of the document showing the proposed change type. At this point, comment text can be added (if required), and a category can be applied:



Below is an example of the delete text tool being used to add a proposed change:



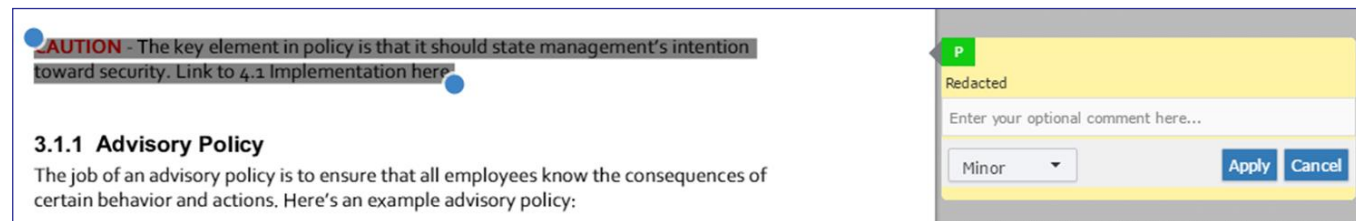


14.2.3 Redacting a PDF

Redacting a document can be done using one of the redaction tools available. Simply select the required redaction tool from the 'Redact' section of the toolbar then apply it to the relevant area in the PDF document.

Redactions are treated as proposed changes, and a new proposed change box will appear to the right of the document showing 'Redaction' as the change type. Again, comment text can be added (if required), and a category can be applied. Additional categories are available for redactions (see [Redaction Categorization](#)).

Below is an example of the 'Text Selection Redaction' tool being used:



To display redacted content, click the 'Redaction View Mode' icon () on the 'Redact' section of the toolbar.



14.2.4 Comment Categorization

If enabled, Reviewers may categorize a comment or proposed change. This is achieved by selecting the comment category from the drop-down box:

A screenshot of a web interface for adding a comment. At the top is a yellow bar with a blue tab labeled 'c'. Below it is a text input field with the placeholder 'Enter your comment here...'. To the left of the input field is a dropdown menu currently showing 'Minor'. The dropdown menu is open, displaying a list of options: 'Minor', 'Typo', 'Major', 'Cosmetic', and '<blank>'. To the right of the dropdown are two buttons: 'Apply' and 'Cancel'. The entire dropdown menu is highlighted with an orange border.

Notes:

- Comment categories are system configurable and therefore may not be present or the list displayed may be specific to your system;
- Comment categories can be edited/added by your System Administrator;
- Comment categorization can be mandatory. If categorization has been made mandatory you will not be able to apply your comment or proposed change until you have selected a category.

14.2.4.1 Redaction Categorization

PleaseReview can be configured to apply specific settings to redactions, such as color and overlaying text when downloading a PDF with redactions. This is linked to the comment categorization applied to a redaction.

PleaseReview is pre-configured for the following comment categories when applying redactions to a PDF:

- i. 'EU70-PPD'
- ii. 'EU70-CCI'

Once applied, any redactions with the above comment categories will appear with pre-configured settings based on the EU Policy 70 requirements for redaction in the document. See [PDF Document Download in V6.1](#).

Note that these categories can also be disabled by the System Administrator.

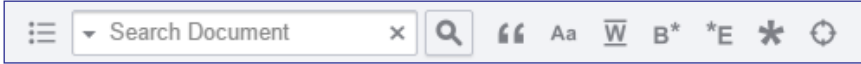









14.2.5 Search

The 'Search' section of the PDF toolbar, allows you to search the content of a text-based PDF.

To search text, select the 'Search' section of the PDF toolbar and enter your text in the 'Search Document' text box then click the magnifying glass icon or press Enter on your keyboard.

Search results will be listed below the search text box and they will be highlighted on the document for ease of viewing. To clear the search results, click the 'X' in the Search Document text box. Search results can be narrowed using one of the following search icons:

	
	Match Exact Word or Phrase - For example, search for an exact word "home" or a phrase "go home".
	Match Case - For example, search for "Home" or "home".
	Whole Word - For example, search for "home" and the search results will return "home" and "homeschooled".
	Begins With - For example, search for "con" and the search results will return "content" and "continued".
	Ends With - For example, search for "ent" and the search results will return "document" and "content".
	Use Wildcards - For example, use the asterisk (*) and search for "*@domain.com" and the search results will return all email addresses that have "@domain.com" in them (i.e., jane@domain.com). You can also use the question mark (?) and search for "ra?e" and the search results will return "rate", "rake", "race", etc.
	Proximity Search - Search for two terms within a specified distance of each other using the ~n syntax, where "n" is how many words can be between the first and second search terms. For example, search the terms "collaborate documents ~3" and the search results will return "collaborate on documents".

Notes:

- The search function searches document text. PleaseReview comments and proposed changes are not searched;
- A list of previous searches can be found under the drop-down arrow in the Search Document text box area;
- Selecting the 'Use Wildcards' or 'Proximity Search' icon will automatically disable the other search icons.



14.2.6 Importing PDF Annotations

It is possible to import PDF annotations into PleaseReview. PDF annotations include all mark-up on the PDF including review annotations, redactions, etc. PleaseReview will convert these into the nearest PleaseReview equivalent.

To import annotations, go the Review Control Panel and select the 'Import PDF Annotations' link:

Document	Open	Accepted	Merged	Closed	Withdrawn
Classifications.pdf	0	0	0	0	0
Security Policy.pdf	0	0	0	0	0

[Status](#)
[Download copy](#)
[Notify](#)
[Delegate](#)
[Copy Emails](#)
[Import PDF Annotations](#)

[View Report](#)
[Enter Review](#)
[Back](#)

The 'Import PDF Annotations' screen opens, allowing you to select a PDF to upload and assign a comment category to the annotations:

Import PDF Annotations

PDF documents that can import annotations

Name	
Classifications.pdf	<input checked="" type="radio"/>
Security Policy.pdf	<input type="radio"/>

Comment Category Minor ▼

File Choose file Classifications.pdf

Upload

Back



Once the PDF file containing annotations has been selected, click 'Upload'. Confirmation of the upload is displayed along with details of any substituted or failed imports:

The screenshot shows the 'Import PDF Annotations' form. It includes a table of PDF documents, a 'Comment Category' dropdown, a 'File' upload section, and a 'Back' button. Two orange callout boxes highlight specific information: one points to the 'Number of annotations imported' (2) in the summary, and the other points to the 'Number of successful imports: 2' in the summary.

PDF documents that can import annotations	
Name	
Classifications.pdf	<input checked="" type="radio"/>
Security Policy.pdf	<input type="radio"/>

Comment Category: Minor

File: Choose file No file chosen

Upload

Back

Number of successful imports: 2
Number of substituted imports: 0
Number of failed imports: 0

Number of annotations imported

Notes:

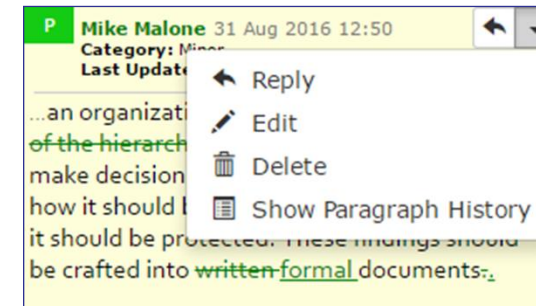
- Once imported, the action cannot be undone. The only way to undo the action is to manually delete the annotations individually in the review;
- The comment category applies to all annotations. Once imported, the categories can be edited manually in the review;
- If 'enforce mandatory categorization' is on, you will be prompted to select a category for all imported annotations;
- If redaction marks have been applied in the PDF (burnt), they will not be imported. Only items marked for redaction will be imported;
- Annotation tools not supported in PleaseReview will be substituted with a sticky note. The following annotation tools are not supported: Underline; Text Comment; Text Box; Stamping; Attach file; Record audio; Text Callout; Polygon; and Cloud.



14.3 Actions

When a comment or proposed change has been added there is the option to 'Reply', 'Edit' or 'Delete' the comment/proposed change.

This is done using the actions menu icon (▾) which appears in the top right of a comment or proposed change when you hover over the comment or proposed change:

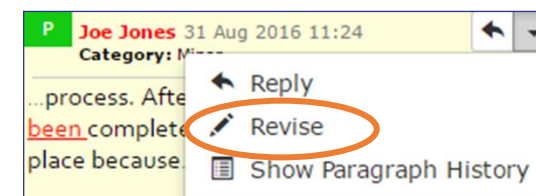


Notes:

- Only the participant who made the comment has the option to edit or delete it, and can only do so if no-one has replied to it and it is open (i.e. not 'Accepted' or 'Closed' by an Author);
- If a comment has a reply made against it, the person who made the original comment will no longer have the option to delete it, but will have the option to 'Withdraw' it which will effectively close it;
- 'Show Paragraph History' relates only to Microsoft Word documents (see [Paragraph History](#));
- On withdrawing a comment the user may be prompted to enter a reason (if configured).

In a Microsoft Word review, another participant's proposed change may be revised using the 'Revise' option in the actions menu:

This leaves the original proposed change unchanged, but updates the editable text with the changes in the original proposed change. This change can then be edited as required and, when applied, will form a new proposed change.





14.3.1 Replying to Comments and Changes

To start a discussion thread, it is possible to use the quick reply icon (↩) which appears in the top right of a comment or proposed change (adjacent to the actions drop-down) when you hover over the comment or proposed change.

Clicking the quick reply icon on a comment or proposed change will open a comment area:

Text can be entered into the comment area and, once applied, the reply will be displayed as a discussion thread:

P Mike Malone 31 Aug 2016 12:49 #9
Category: Minor
Last Updated: 20 Oct 2016 8:37

...place because it ~~will be much~~ is easier for the organization to determine and prioritize security policies based...

Joe Jones 20 Oct 2016 8:35
Does prioritization happen here? Perhaps we need to cross reference to the relevant sections of the risk assessment policy?

Helen Harris 20 Oct 2016 8:37
Agreed, we need the cross-references.

P Mike Malone 31 Aug 2016 12:49 #9
Category: Minor
Last Updated: 19 Oct 2016 13:03

...place because it ~~will be much~~ is easier for the organization to determine and prioritize security policies based...

Enter your reply here...

Apply Cancel

Notes:

- The option to reply to a comment or change is also available from the actions menu icon (⌵);
- Once 'Accepted', 'Closed' or 'Withdrawn', no further discussions are possible and the 'Reply' option will not be available;
- If the comment box is minimized, the number of replies will be identified.

P Mike Malone + 2 replies #9



14.3.2 Paragraph History

In a Microsoft Word review, the 'Show Paragraph History' option will display the original paragraph text including original Microsoft Word comments, tracked changes and tracked moves, and all comments and proposed changes on a paragraph. This option is available from the actions menu icon (▾), and is also available from within the inline editor using the '≡' icon.

Selecting the 'Show Paragraph History' option will open the paragraph history window:

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.

Comments and Changes:

- Mike Malone** 31 Aug 2016 12:49 **Category: Minor** **Last Updated: 20 Oct 2016 8:37** #9

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 and prioritize security policies based on what has been deemed most important from the risk assessments.
- Joe Jones** 20 Oct 2016 8:35

Does prioritization happen here? Perhaps we need to cross reference to the relevant sections of the risk assessment policy?
- Helen Harris** 20 Oct 2016 8:37

Agreed, we need the cross-references.
- Joe Jones** 31 Aug 2016 11:24 **Category: Minor** #7

Security is truly a multilayered process. After on a risk assessment is has been 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.



14.4 Document Mark Up and Icons

Once comments and proposed changes have been made, they are displayed to the right of the document at the appropriate paragraph/location and are instantly visible to other Reviewers when they enter the review. If they are already in the review the comments and changes will automatically appear within 60 seconds.

Proposed changes are presented in colored text with deleted text struck through and inserted text underlined. Different Reviewers' proposed changes are shown in different colors for ease of identification. The colors are shown in both the document and the comment information box to the right of the document:

The diagram illustrates the document review process. On the left, a document snippet titled "1 Policies, Procedures, Standards, Baselines Guidelines" contains text with markup: "Security is truly a multilayered process. After ~~an a risk assessment~~ is has been completed, policies will fall ~~quickly~~ in place because it ~~will be much~~ is easier for the organization to determine ~~and prioritize~~ security policies based on what has been deemed most important from the risk assessments." Below this, a callout box states: "Different colors for different participants".

On the right, a comment box displays two entries:

- C** **Joe Jones** 31 Aug 2016 12:52 #11
Category: Minor
Last Updated: 19 Oct 2016 21:57
We need more information about the risk assessment in this introduction.
- P** **Mike Malone** 31 Aug 2016 12:49 #9
Category: Minor
Last Updated: 19 Oct 2016 13:03
...place because it will be much is easier for the organization to determine and prioritize security policies based...

Callouts from the document text point to the comment box:

- A box at the top right states: "All comments and proposed changes display to the right of the document".
- A box at the bottom right states: "Icons reflect comments and proposed changes".



Icon	Description
	Open comment (i.e. an Author has not accepted or closed the comment).
	Open general comment.
	Open proposed change.
	Conflicting proposed change. Only the latest proposed change is shown in the document.
	Accepted comment/proposed change (i.e. an Author has accepted the comment/change).
	Closed comment/proposed change (i.e. an Author has closed the comment/change), or 'Withdrawn' (i.e. the comment author has withdrawn it).

Notes:

- Hovering over a paragraph in the document will highlight the comment box(es) containing comments and proposed changes related to the paragraph;
- Hovering over a comment box will highlight the relevant paragraph in the document which the comment/change relates to;
- Clicking on the comment/change in the navigation pane will scroll the document to the comment in the appropriate location;
- Comment boxes can be minimized by clicking the or icon. Clicking again will maximize the comment box;
- All icons are displayed in the navigation pane when navigating by comments;
- A Reviewer is likely to have different colors allocated in different reviews due to the way the color allocation is managed;
- The colors allocated to Reviewers by PleaseReview are not reflected in any downloaded Word document.



15 Reviewing Documents in the Classic Interface

15.1 The Comment Window

The comment window is where you make comments and proposed changes. When an area of the review document is selected (i.e. paragraph in Word, location in images, text/graphic selection in PDFs), all existing comments, proposed changes and associated discussion threads for the selected area is displayed in the comment window.

The comment window can be set to display on the right hand side of the review interface, the left, or as a pop-up. You can set your location preference in your [user settings](#).



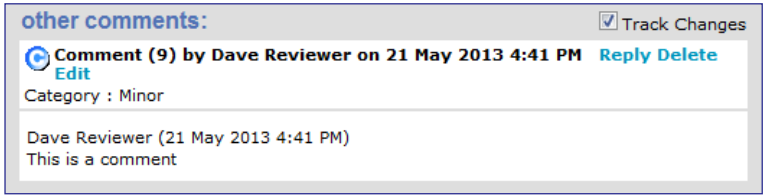

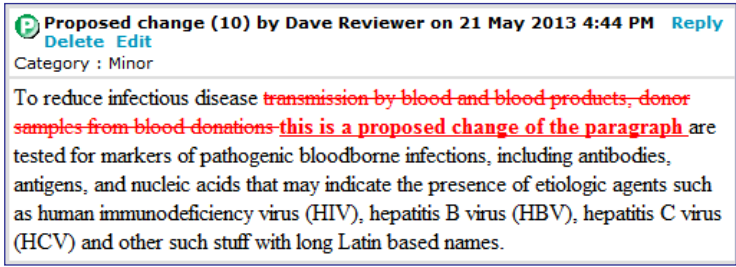
15.1.1 Adding Comments and Proposed Changes

To add a comment or make a proposed change, simply click on the area of the review document to activate it in the comment window:

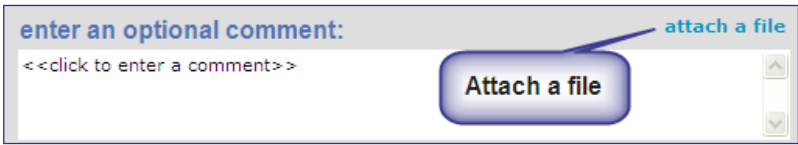
The screenshot shows the 'comments on Sample policy document.docx' window. It features a 'Paragraph Id 3' header with a 'refresh' link. Below this are tabs for 'Comments', 'Bookmarks', and 'Notify'. The main area is divided into two sections: 'enter an optional comment:' and 'and/or edit the text of the paragraph below:'. The 'enter an optional comment:' section has a text input field with a placeholder '<click to enter a comment>' and an 'attach a file' link. The 'and/or edit the text of the paragraph below:' section has a rich text editor with a toolbar containing various formatting tools. Below the editor is a 'Category' dropdown menu set to 'Minor', and 'Apply' and 'Cancel' buttons. At the bottom, there is a 'Navigate by:' section with a link to 'all comments:'. The 'other comments:' section shows a list of comments, including a 'Proposed change (73)' and a 'Comment (72)'. The 'Proposed change (73)' is highlighted, showing the 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.' The 'Comment (72)' is also shown, with the text 'Daniel Demo (26 Jul 2016 16:47) We need more information about the risk assessment before this...'. Annotations with orange boxes and arrows point to various elements: 'Enter comment text here' points to the comment input field; 'Link to attach file' points to the 'attach a file' link; 'Formatting tools' points to the rich text editor toolbar; 'Click 'Apply' to apply comment or change' points to the 'Apply' button; 'Once applied, all comments and proposed changes are recorded in the comment window.' points to the 'other comments:' section; 'Categorize comment/change' points to the 'Category' dropdown; and 'Make proposed changes to text here' points to the rich text editor.

Note that the default setting is for the comment window to appear as a popup, however it can be configured in the user settings to appear to the left or right of the document.



Type	Description
Comments	<p>These are comments on a paragraph or item (i.e. graphic).</p> <p>Comments are entered in the box entitled 'enter an optional comment'. Once applied, the comment will be as shown here.</p> 
General comments	<p>It is possible to add a general comment to a document using the  toolbar icon.</p>
Proposed changes	<p>These are proposed changes to the wording of a paragraph. A comment regarding the proposed change can be added if required.</p> <p>To create a proposed change, the text of the paragraph is edited within the text box below the comment box.</p> <p>Once applied, the proposed change will be as shown here:</p>  <p>Note: if the text is edited or formatted, the edit will be treated as a proposed change, any associated comment will be treated as a comment associated with the proposed change.</p> <p>If the paragraph is bigger than the display area, it is possible to expand or reduce the size of the display area using the '-' and '+' options located on the upper right hand side.</p> <p>It is possible for the review Owner to disable the ability to apply proposed changes to a document and thus the only option will be to add a comment.</p>



Type	Description
Attach a file	<p>A file may be attached to a comment or proposed change, or the entire comment may be the attached file – there is no need to enter any textual comments or edit the paragraph to attach a file.</p> <p>Select the 'attach a file' option: This will open a browse option. Select the file and then use the standard 'OK' or 'Apply' options to create the comment which appears in the same way as a standard comment.</p> 

For text-based documents, a comment or proposed change can be made. For non text-based documents, the paragraph text box will contain the words 'no paragraph text available' (i.e. proposed changes cannot be made).

Note: within the comment window, the 'OK' button will apply the comment/ proposed change and close the comment window, whilst the 'Apply' button will apply the comment/ proposed change but leave the comment window open. The 'Close' button will cancel the action and close the window.



15.1.2 Options Available

When a comment has been added there is the option to 'Reply', 'Delete' or 'Edit' the comment/proposed change:

other comments: ☒ Track Changes

Comment (3) by Dave Reviewer on 1 May 2013 2:26 PM [Reply](#) [Delete](#) [Edit](#)

Category : Minor

You can reply to another participant's comment or proposed change using the 'Reply' link. The reply will be displayed as a discussion thread:

Comment (9) by Dave Reviewer on 22 May 2013 10:39 AM
Category : Minor **Last Updated: 22 May 2013 10:39 AM**

Dave Reviewer (22 May 2013 10:39 AM) [Reply](#)
This is a comment

Clare Reviewer (22 May 2013 10:39 AM) [Reply](#) [Delete](#) [Edit](#)
my reply

Notes:

- Only the participant who made the comment has the option to edit or delete it, and can only do so if no-one has replied to it and it is open (i.e. not 'Accepted' or 'Closed' by an Author);
- If a comment has a reply made against it, the person who made the original comment will no longer have the option to delete it, but will have the option to 'Withdraw' it instead.
For example, if one Reviewer makes a comment and another Reviewer replies with a message which causes the original Reviewer to re-consider the comment, it is not possible for the original Reviewer to delete or edit the comment (because of the reply). So the only option is to 'Withdraw' the comment which will effectively close it;
- Once 'Accepted', 'Closed' or 'Withdrawn', no further discussion of a comment, etc. is possible. Thus it is no longer possible to 'Reply' to it;
- On withdrawing a comment the user will be prompted to enter a reason.



Another participant's proposed change may be edited using the 'Revise' link.

This leaves the original proposed change unchanged, but updates the editable text with the changes in the original proposed change.


This change can then be edited as required and, when saved by clicking 'OK', will form a new proposed change.

 **Proposed change (7) by Dave Reviewer on 22 May 2013 10:32 AM** [Reply](#)

[Revise](#)


Category : Minor

~~“This test represents a significant~~ **“The original proposed change** advance in the application of genetic technology and paves the way for similar genetic diagnostic tests to be developed in the future,” said Daniel Schultz, MD, director of FDA’s Center for Devices and Radiological Health.

 **Proposed change (8) by Clare Reviewer on 22 May 2013 10:37 AM** [Reply](#) [Delete](#) [Edit](#)

Category : Minor

~~“This test represents a significant~~ **“The original proposed change** advance in the application of genetic technology and paves the way for similar genetic diagnostic tests to be developed in the future,” said Daniel Schultz, MD, director of FDA’s Center ~~for Devices and Radiological Health~~ **a revision to the original change.**

 **Proposed change (7) by Dave Reviewer on 22 May 2013 10:32 AM** [Reply](#) [Revise](#)

Category : Minor **Last Updated: 22 May 2013 10:37 AM**

~~“This test represents a significant~~ **“The original proposed change** advance in the application of genetic technology and paves the way for similar genetic diagnostic tests to be developed in the future,” said Daniel Schultz, MD, director of FDA’s Center for Devices and Radiological Health.



15.1.3 Comment Categorization

If enabled, Reviewers may categorize a comment or proposed change.

This is achieved by selecting the comment category from the drop-down box:

enter an optional comment:
<<click to enter a comment>>

and/or edit the text of the paragraph below:

-- Font family --

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

Category: Minor

OK Close

Note: Comment categories are system configurable and therefore may not be present or the list displayed may be specific to your system. There is also an option to make categorization mandatory. If categorization has been made mandatory you will not be able to apply your comment or proposed change until you have selected a category.

15.1.4 Paragraph ID

At the top right of the comment window is the 'Paragraph Id':

This is a link. Clicking on the link will scroll the document to the location of the paragraph.

Sample policy document

Paragraph Id 7

Bookmarks Notify refresh

This can be useful when considering making a comment or proposed change to a paragraph, but want to check something elsewhere in the document first. By clicking on the paragraph of interest the comment window opens and the document can be scrolled and read as appropriate. Then using the comment window, clicking on the 'Paragraph Id' will return the user to the original location.

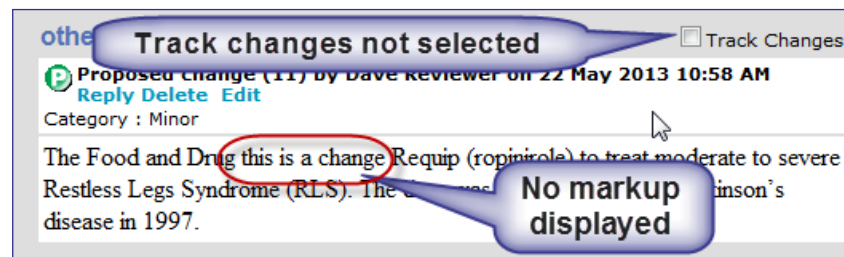


15.1.5 Track Changes

Adjacent to the 'other comments:' title is 'Track Changes':

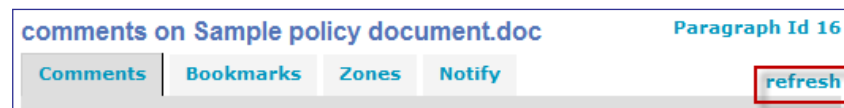


When unchecked, 'tracked changes' are removed within the text of proposed changes:



15.1.6 Refresh Comment Window

At the top right of the comment window, below the paragraph ID, is a 'refresh' link:



This refreshes the comment window only (not the entire document), and adds any additional changes for the paragraph/location since the comment window was opened.



15.2 Inline Editing and Paragraph Toolbar

Inline editing, if enabled, allows the user to edit a paragraph directly in the document rather than in the pop-up comment window or in the comment pane.

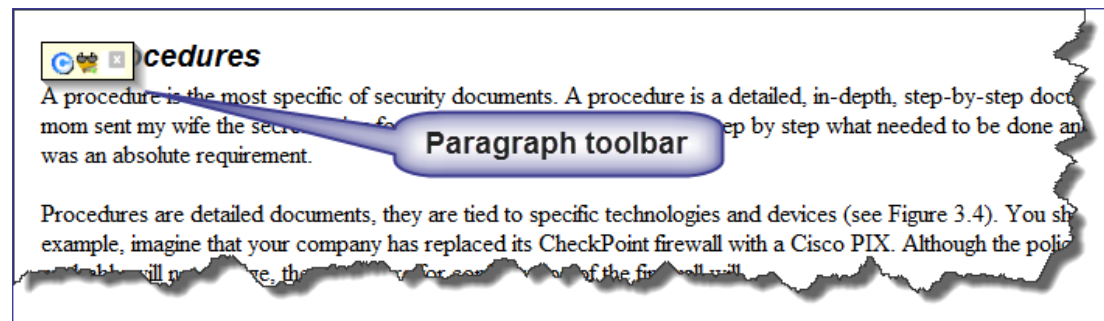
When the user clicks on a paragraph, an edit area opens inline in the document. Editing the text will create a standard proposed change. Inline editing is a user preference which must be selected in the 'user settings' window.

The screenshot displays a document with three sections: 3.1.4 Standards, 3.1.5 Baselines, and 3.1.6 Guidelines. A callout bubble points to the text in the 3.1.4 Standards section, stating: "Clicking on the paragraph text allows a proposed change to be made inline". Another callout bubble points to a 'Category: Minor' dropdown menu, stating: "Clicking on this spanner will display the formatting options". A third callout bubble points to a paragraph toolbar, stating: "Clicking on this spanner will display the formatting options". The toolbar includes buttons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), and other formatting options. The document text is shown in a light gray background, and the editing area is highlighted with a blue border.

Once the proposed change has been completed, a category can be selected if required. Clicking Apply will update the document, displaying a 'P' icon and the mark-up.



When inline editing is selected the user is provided with a paragraph toolbar which appears when the mouse is hovered over the paragraph text:



Clicking on the 'C' icon will open the pop-up comment window or pane (depending on user settings) allowing comments to be made in the normal way.

Clicking on the private bookmark icon will immediately insert a private bookmark against the paragraph. To make a public bookmark click on the 'C' icon to access the bookmark tab from the comment window.

Under user settings it is possible to select 'Toolbar only', in which case the paragraph toolbar just displays the bookmark icon allowing a bookmark to be applied with a single click. Clicking on the paragraph text will open the comment window/pane so that comments and changes can be made in the usual way.




15.3 Document Mark Up and Icons

Once comments have been made, they are attached to the appropriate paragraph/location and are instantly available to other Reviewers. So if another Reviewer clicks on the paragraph/location immediately after, they will see the comment, regardless of whether there is mark-up shown on the document.







Clicking 'Refresh' updates the document being viewed to show the comments from other Reviewers on the document and in the navigation pane (note: as per the paragraph above this is a visual indicator only).

Proposed changes are presented in colored text with deleted text struck through and inserted text underlined. Different Reviewers' proposed changes are shown in different colors for ease of identification. The colors are shown in both the comment pane and the pop-up information box that appears when the icon is 'hovered-over'. They are reflected throughout the document and comments, and are consistent throughout the review.

1 Policies, Procedures, Standards, Baselines Guidelines

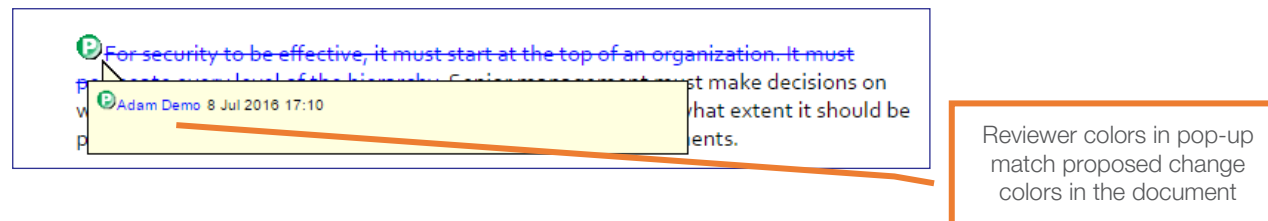
 Security is truly a multilayered process. After ~~an~~ a risk assessment ~~is~~ has been completed, policies will fall ~~quickly~~ in place because it ~~will be much~~ is easier for the organization to determine and prioritize security policies based on what has been deemed most important from the risk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

Icons reflect comments and proposed changes




Icon	Description
	Open comment (i.e. an Author has not accepted or closed the comment).
	Open general comment. If present, will be visible in the top center of the document.
	Open proposed change.
	Conflicting proposed change (Word and Excel only). Only the latest proposed change is shown on the screen.
	Accepted comment/proposed change (i.e. an Author has accepted the comment/change).
	Closed comment/proposed change (i.e. an Author has closed the comment/change), or 'Withdrawn' (i.e. the comment author has withdrawn it).



Hovering your mouse over an icon will display a pop-up box with more details:



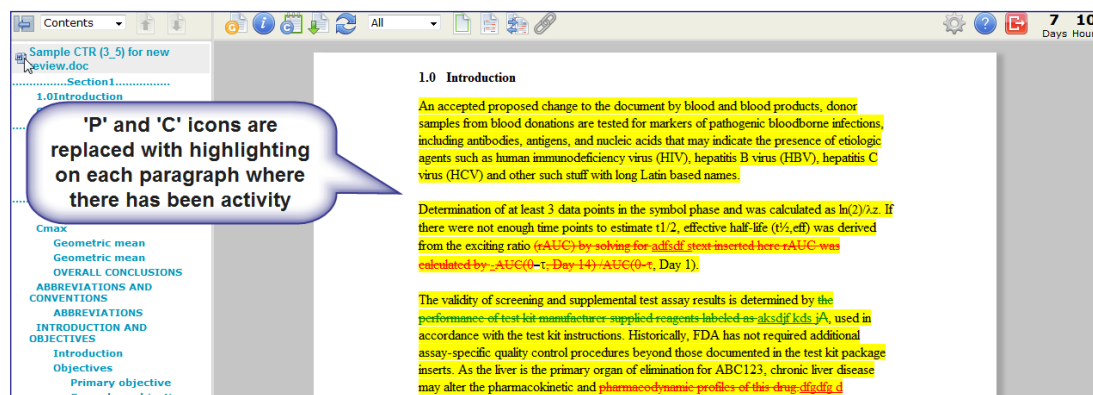
Notes:

- Each paragraph/location may have multiple comments and changes of different types but will not have multiple icon states displayed. Only one icon of each type (i.e. , , ) will be displayed with the displayed icon being the most relevant. For example, if a paragraph has accepted, open and closed comments on it, only the icon for the accepted comment will be displayed;
- Clicking on the icon will open the comment window for the appropriate paragraph/location;
- Clicking on the comment in the navigation pane will scroll the document to the comment and open the comment window for the appropriate paragraph/location;
- With images, the icon will appear over the image. The icon may obscure the image and, therefore, the icons can be hidden using the 'hide icons' button at the top of the page;
- The same Reviewer is likely to have different colors allocated in different reviews due to the way the color allocation is managed;
- The colors allocated to Reviewers by PleaseReview are not reflected in any downloaded Word document.



15.4 Highlighting Paragraphs

For Word, Excel and text documents only, instead of identifying paragraphs with comments and proposed changes using the standard icons, there is the option of identifying such paragraphs by highlighting them. The primary purpose of this is to prevent the icons 'messing up' the formatting of items such as tables, etc.



Notes:

- The paragraph is simply highlighted to indicate activity. The highlight is the same color (yellow) regardless of the type of comment, or the status of the comment except where there is a conflicting proposed changed in which case the paragraph is highlighted in red;
- The 'general comment' icon is not replaced and remains to indicate a general comment on the document;
- The hover over pop-up (which in the 'icon' view pops up if the icon is hovered over) is displayed after a delay (system configurable) when the paragraph itself is hovered over.



15.5 Find

'Find in review' (available for Word documents only) allows you to search the content of the Word documents in the review together with associated comments and open changes. Accepted changes are considered part of the document and are therefore included in the search whilst closed (rejected) comments and changes are not searched.

The search results are displayed paragraph by paragraph with the search terms being highlighted in the paragraph text. This allows you to rapidly view the context of the search term within the contents of the paragraph to review for consistency of use, etc.

Selecting  from the review toolbar opens the text search in a new window or tab. Many search windows can be opened.

Note: This is currently only available in the PleaseReview classic interface. If using the V6.1 review interface, you can switch to the classic interface or you can use Ctrl+F or F3. This will use the standard browser 'Find' tool and allow you to navigate to the next/previous value.

Notes:

- A search will include text visible to the user. Therefore it will search EditZones locked for editing, but not paragraphs that are hidden to the user;
- If an EditZone has been revised or published, the search will include the updated EditZone text;
- If the review contains multiple Word documents, the document may be selected for inclusion (or not) in the search using the check boxes;
- If you have clicked 'More options', the 'Return to default' option will clear any selected options as well as the search term, and return the screen to the standard search;
- In the search results, clicking on the paragraph ID in the 'Location' column will scroll the document to the selected paragraph and present the comment window in the review tab in the browser;
- Use the 'Close' button located at the top of the page to close the browser tab for the search and return to the review;
- Use the 'Print' button to print the display;
- The search functionality can only be used when you are in the review. If you leave the review and attempt to use the search (that may have been left open) you will get an error;
- After selecting or deselecting a check box option you must click the 'Find' button again to ensure the search matches your options.



15.5.1 Standard Searching

The standard search works on a word by word basis (i.e. words separated by spaces) and ignores punctuation. For example, if you enter 'find this text', the search will return instances of the three words together in that order, ignoring additional spaces, formatting and punctuation.

Searches will return results using the exact words. A '*' may be used as a wildcard anywhere in the search string but Boolean searching is not supported.

Selecting the 'More options' link will open additional options to make the search (i) case sensitive, (ii) accent sensitive, and (iii) advanced.

[Print](#)
[Close](#)

Find In Review

Document

☒ PleaseReview v5.0 User Manual[in pro].docx

☐ PleaseReview v5.0 User Manual.docx

Search For

Search for words separated by spaces. Search ignores punctuation in both the search and output. Use '*' as wildcard. Boolean operators (e.g. AND, OR, NOT) are not supported. For advanced searching select 'More options'.

☐ **Include comments and open changes**

[More options](#)

[Find](#)

Find results for PleaseReview v5.0 User Manual[in pro].docx (PleaseReview v5.0 User Manual[in pro].docx)

Location	Comment / Paragraph Text
Para ID 273	PleaseReview is designed to facilitate the collaborative authoring and review of documents The application is designed around roles reviews and workgroups
Para ID 275	The collaborative authoring features works directly with Microsoft Word
Para ID 291	Review Types PleaseReview is designed as a collaborative review solution In addition to the single stage collaborative review PleaseReview also supports

The image above shows the search results being displayed paragraph by paragraph with the search terms highlighted in the paragraph text.



15.5.2 Advanced Searching

Selecting the 'Advanced search' checkbox performs an advanced search. The advanced search capability is not a word search but a 'pattern match' search for letters, digits, spaces and some punctuation only (although all punctuation can be handled as part of a regular expression - see notes). The output also includes punctuation.

Notes:

- A search for the word 'fred' will include in the results 'fred', 'freds', 'befred' and any word which includes the string (i.e. pattern) of 'fred';
- The exact pattern is matched. For example, a search for 'fred blogs' will not find 'fred blogs' - the double space in the latter excludes it from the results;
- The search will be case sensitive if the 'case sensitive' option is selected;
- The 'Accent sensitive' option is not available with advanced searches;
- If you are searching for a simple set of words and wish to have punctuation in the output, select 'Advanced search';
- Certain punctuation characters will invoke the 'Regular Expression' functionality (see [Regular Expression Searching](#));
- When searching for a string which includes punctuation, take care and understand the role of metacharacters (see [Regular Expression Searching](#));
- When 'Advanced search' is selected a full regular expression may be used in the search box to return results. This permits extremely complex searching (see [Regular Expression Searching](#)).



15.5.3 Regular Expression Searching

When 'Advanced search' is selected a full regular expression may be used in the search box to return results.

Note that the search box automatically assumes that it is a regular expression search and the metacharacters will be treated as a regular expression unless 'escaped'.

Regular expressions allow for extremely complex searching including full 'boolean' searches and subtle searches where, for example, you want to match alternate spellings such as returning all instances of grey and gray or colour and color.

Regular expressions use 12 standard 'punctuation' characters (known as metacharacters) to determine advanced searches. These metacharacters are: \ ^ \$. | ? * + () [and {

For example '|' is the equivalent of the Boolean 'OR'. So searching for 'jack|jill' will return results that include either 'jack' or 'jill'.

The period (full stop) '.' is used as a wildcard. If you wish to search for a string which includes one of these metacharacters you must precede it (technically 'escape' it) with '\'.

So, if you have advanced search checked and you search for 'word.', unless escaped, you are searching for the equivalent of 'word*' in a simple search. With advanced search selected, if you want to search for 'word.', you need to search for 'word\.' – the '\' tells the search to ignore the period as a metacharacter.

The detailed use of regular expressions is outside the scope of this manual but there is a lot of information available on the internet. PleaseTech recommends www.regular-expressions.info as a good place to start.

PleaseReview uses the Microsoft .NET regular expression set which is referenced at:
[http://msdn.microsoft.com/en-us/library/az24scfc\(v=vs.110\).aspx](http://msdn.microsoft.com/en-us/library/az24scfc(v=vs.110).aspx).



15.6 Refreshing the Document (Auto-Refresh)

Comments and proposed changes are applied as soon as the 'OK' or 'Apply' button has been clicked. However, in order to view the changes in the browser and to update the document icons and comment navigation, 'Refresh' is available.

The manual refresh icon on the toolbar will reload the entire document. If it is a large document this may take some time.

The auto-refresh option in the user settings (if available) will automatically update the document to show the latest comments and changes without reloading the whole document. This happens every time a comment is made or updated, and also at a specified time interval.

review preferences	
Automatic refresh	<input checked="" type="checkbox"/> 60 Interval in second(s)
Give reason when accepting/closing comments (authors only)?	Always ▼

If the box is checked the document will auto-refresh. The default interval (specified by the system configuration settings) is the minimum interval. Therefore the interval can be made longer but not shorter.



15.7 Bookmarks and Personal Notes

PleaseReview supports private and public bookmarks and personal notes, collectively called 'Bookmarks'.

Participants can have a single bookmark per paragraph. This bookmark may contain personal notes (which may be converted to a comment) and be made into a public bookmark.

To create a bookmark select the paragraph by clicking on it and the comment window will open. If browsing by bookmarks, the 'Bookmarks' tab will be at the front. If not, it will need to be selected.

The title will be pre-filled with the first 45 characters of the selected paragraph. The title can be over-typed if required.

Notes may be added. The 'OK' and 'Apply' options work the same as in the Comments tab.

A screenshot of a web application window titled "bookmarks on Sample policy document.doc" with "Paragraph Id 98" in the top right. The window has four tabs: "Comments", "Bookmarks" (which is selected), "Zones", and "Notify". The "Bookmarks" tab contains a form with a "title" field pre-filled with "A procedure is the most specific of security dod", a "notes" text area, and a "Make Public" checkbox. Callout boxes point to the "title" field with the text "The Bookmark title", to the "notes" area with "Personal notes here", and to the "Make Public" checkbox with "Make public". At the bottom of the form are "OK", "Close", and "Apply" buttons. Below the form is a "Navigate by:" section with a link to "bookmarks" and a section titled "bookmarks on this paragraph:".




Once applied, the bookmark will be displayed in the lower section of the window under 'bookmarks on this paragraph':

A screenshot of a section titled "bookmarks on this paragraph:". It contains a single bookmark entry: "My Private bookmark by Demo Reviewer 1". To the right of the entry are three links: "Delete", "Edit", and "Convert to comment".

Any additional bookmarks from other participants will also be shown.



There are three bookmark icons available:

Icon	Description
	Your own private bookmark - will not be seen by other participants.
	Your own public bookmark - will be seen by other participants.
	Another participant's public bookmark. You won't see another participant's private bookmarks.

Notes:

- Hovering your mouse over a bookmark icon will display a tooltip with further information;
- Bookmarks will also be displayed in the navigation pane if 'Bookmarks' is selected in the drop-down box;
- Bookmarks do not appear in the reconciliation report, and are not accepted or closed by an Author.

15.7.1 Converting a Bookmark to a Comment

If you have notes associated with a bookmark, these can easily be converted into a comment by clicking on the 'Convert to comment' link.



Selecting this will open the 'Comment' tab with the comment pre-filled with the bookmark's notes. This can then be edited. This functionality allows the Reviewer to make private notes on the document as they read it, and then go back and decide whether to convert the notes into comments.



15.8 Reviewing Word


To make a comment simply click on the paragraph you wish to comment upon. The comment window will then open (see [The Comment Window](#)).

15.8.1 Document Shading

If parts of the document for review are shaded, this indicates that an EditZone is present. See [Using EditZones](#).

15.8.2 Images within Word Documents

Due to the inherent design of browsers, images are scaled when presented. This can mean that an image becomes illegible.

When the user hovers over an image, an icon () appears in the top left hand corner of the image. Clicking on the icon opens the image full size in a new browser window. Clicking elsewhere on the image opens (as previously) the associated comment window.



Note: This functionality is available only for Word documents.



15.9 Reviewing Excel

To make a comment simply click on the cell you wish to comment upon. The comment window will then open.

The screenshot shows the PleaseReview interface. On the left, a sidebar lists documents: '1 - Sample policy document-for demo.docx' and 'simple test spreadsheet.xlsx'. The main area displays an Excel spreadsheet titled 'Sheet Name : Data'. The spreadsheet has columns A through L and rows 1 through 9. A green header row (row 3) is labeled 'Trial Data'. Below it, rows 4 through 9 contain data for 'Trial', 'Days', and 'Compound volume'. A comment window is open on the right side of the spreadsheet, titled 'comments on simple test spreadsheet.xlsx'. The window has tabs for 'Comments' and 'Notify'. It contains a text input field with the placeholder '<< click to enter a comment >>', a 'paragraph text' section with a 'no paragraph text available' message, a 'Category' dropdown set to 'Minor', and 'Apply' and 'Cancel' buttons. At the bottom, it says 'Navigate by: << all comments >>'.

Trial	Days	Compound volume											
A	2	0.2501			division	9.5							
B	3	0.502											
C	5	0.751											
D	5	1.012											
E	6	1.252											
F	4	1.507											

Notes:

- Proposed changes are supported on both formulae and text. As for Word documents, accepted proposed changes will, by default, update the Excel file on download unless the original spreadsheet is 2003 (.xls) format. In this instance accepted changes to formulae cells are shown in the downloaded document as comments;
- No attempt is made to validate proposed changes to formulae. If the revised formula is accepted in PleaseReview and is not correctly formed the downloaded Excel file will flag it as being invalid when opened;
- If a formula is updated the spreadsheet will not recalculate in the browser;
- Special rules apply to cells with reference formulae (i.e. where a cell formula has been created by dragging or copying the formula from another cell);
- Hidden columns and rows will be displayed but the contents will be replaced with the word 'hidden';
- Excel review does not support EditZones, ReviewZones or other such advanced options such as document comparison;
- If the enter key is used when entering data in a blank cell in the review, the data will have the 'Wrap Text' enabled automatically when the document is round tripped back into Excel. If appending data within the review to a cell that has data that is not 'Wrap Text' enabled and the enter key is used, the data will display on one line (inheriting the original format of the data) after round tripping.



15.9.1 Excel Limitations

Due to Excel's inherent complexity and HTML limitations, there are some issues to be aware of:

- If a formulae is changed in PleaseReview it will only be recalculated in the downloaded Excel file once the Excel enable editing button (in the top yellow banner shown for all downloaded documents in Office) has been clicked. Otherwise, the spreadsheet will still show old values based on the changed formulae;
- In the PleaseReview comment window any value that uses symbols (e.g. \$) will only display the value. If making a proposed change there is no need to enter the symbol while in the comments window as once round tripped it will appear with the new value;
- If a user enters a date into a blank cell in PleaseReview, when round tripped into Excel, the format of this value will be 'General' and not a date format as it would if entered into Excel directly. Numbers also have a text value and appear left aligned;
- PleaseReview does not display charts or similar, the worksheet displays a message that there are items which cannot be displayed. Users can, however, enter data in the cells where the chart would be which, when round tripped, would be covered up by the chart;
- When making a proposed change to a date, the format used is the default date format from the server;
- The handling of text wrapping in Excel is very different to HTML. Because of this there may be instances where text which is not wrapped in Excel is shown as wrapped when in the review and vice versa;
- The tooltips for formulae will only display the original formula uploaded. So if a user proposes a change to this and the change is accepted, the tooltip will not show the new value;
- Within Excel, cells can display a list of values for selection which restricts the user to only being able to select from the list. This rule is not upheld in the review and the user can enter any data which, when round tripped, will be accepted;
- Formatted text effects cannot be viewed in the PleaseReview display. However, the formatted effects are retained in the downloaded 'round tripped' spreadsheet. This affects the following formatting options:
 - Angled and vertical text
 - Center and right aligned 'overflow' text
 - Shrink to fit text
 - Cell fill effects
 - Font fill effects
 - Drop-down boxes (selected item is displayed)
 - Charts, text boxes and similar
 - Hyperlinks to other sheets
 - Protected sheets and cells (protection is ignored).
- Comments that are in the original Excel document before being uploaded into PleaseReview are not displayed within the review;
- Percentages are shown within cells: for example 10.0% in the formula bar is displayed as 10%, whilst in the comment window it is displayed as 0.1. If a proposed change is made to the figure it should be made using the 0.1 format in order to be round tripped correctly, otherwise it will be downloaded as an Excel comment;
- Pivot tables are not always drawn correctly.



15.10 Reviewing PDF

There are two options for reviewing PDF files within the PleaseReview classic interface:

- 1) If the user has Acrobat Standard or Professional (i.e. not the free Adobe Reader) installed on their PC, it is possible to use a PleaseReview PDF plugin;
- 2) If the user does not have the necessary Acrobat software or the plugin, it is possible to make use of the 'PDF as image' capability.

The default option is defined by system configuration settings and set by each user in their user settings.

There are two versions of the PDF plugin which are supported by PleaseReview v4.1.x and later. You will need to check with your System Administrator to find out which version of the plugin your server is setup to use.

Note: if you are using a version of PleaseReview which is earlier than v4.1 then you can only use the v3 plugin.

The v3 plugin provides PleaseReview buttons on the Acrobat toolbar when you are in the review. The PleaseReview comment window is used for adding comments and proposing changes.

PleaseReview v4 plugin: Provides access to the Acrobat toolbar so Acrobat comment and mark-up tools can be used, rather than the standard PleaseReview comment window.

Users can change their PDF review settings under [user settings](#).



15.10.1 Acrobat Standard or Professional with PDF Plugin v4

Commenting on PDF documents using the PleaseReview v4 plugin requires a full copy of Acrobat (i.e. Standard or Professional) as well as the v4 plugin. Note: the v4 plugin is supported on Acrobat 7.x and later. The tools available depend on the version of Acrobat installed on the individual machine. The following screenshots are taken using Acrobat 9.

The plugin enables the Acrobat comment and mark-up toolbar (this may need to be selected on the Acrobat toolbar):



Simply click on any of the tools required, inserting a comment or mark-up as if using Acrobat outside of PleaseReview:

IA regulations require control reagents to be used according to 42 CFR 493. If a bloodborne pathogen test kit uses any of its manufacturer supplied reagents to serve as a calibrator function, *i.e.*, either or both of the test kit controls (negative or positive) calculate the assay cutoff, then CLIA regulations require that (an) additional control reagent(s) be included in each run (see table below). Such reagents may be procured or developed in-house. In any case, prior to placing the additional controls in routine use, each lot of reagents should have: 1) a known dating period, *i.e.*, established stability (supplied by a control reagent manufacturer or established by the user on in-house developed control reagents) known performance parameters, *i.e.*, specifications for acceptance. Prior to implementing additional control reagents should be qualified, *i.e.*, evaluated for suitability by the generally accepted laboratory quality control procedures to establish acceptance/criteria, to minimize possible incompatibilities that may exist with particular test kit putting control reagents into use.


TEST KIT REAGENT(S)	USED IN CALCULATION OF THE CUTOFF?	ADDITIONAL CONTROL REAGENT REQUIRED
Negative Control	Yes	Yes (Negative Control)
Negative Control	No	No
Positive Control	Yes	Yes (Positive Control)
Positive Control	No	No
Positive and Negative Control	Yes	Yes (Positive and Negative Controls)

This is the callout tool



Note: there may be some Acrobat tools or options available which are not supported or which the user does not have permission to use in PleaseReview. If such a tool is selected, a pop-up warning will be displayed.

Comments or mark-up which have been applied to the document are not seen by other participants until the review has been synced with the PleaseReview server. The auto-refresh option (if available) will automatically update the document to show all review participants' latest comments and changes. This happens at a specified time interval (default 60 seconds). You can check if 'automatic refresh' is active by clicking on the 'Settings' option on the main PleaseReview toolbar.

Alternatively, a manual sync can be performed by clicking on the 'PleaseTech Sync' button on the Acrobat toolbar: . The manual sync is usually completed in just a few seconds, if there are numerous comments it may take longer. The sync button will remain depressed until the sync is complete.

Note: if a comment or mark-up is in 'edit-mode' (i.e. being added or updated) when an automatic sync takes place it will not be saved to the server until the next sync takes place.


All comments and mark-up will be listed in the Acrobat comment pane.

Note: any replies to comments or mark-up are not shown in the sticky-note pop-up window but will be visible in the Acrobat comment pane.

Whilst the v4 plugin mostly negates the use of the PleaseReview comment window, there remain two instances when it may be required:

- 1) If you wish to apply a comment category;
- 2) If an Author wishes to re-open a closed or accepted comment.

Note: depending on the Acrobat tool used, the comment window will either display a comment or a proposed change.

To open the comment window, select the comment or mark-up then click on the 'Open comments window' button on the Acrobat toolbar: .



15.10.1.1 Using the v4 Plugin Offline

It is possible to use the v4 PDF plugin in offline mode. This means you are able to mark-up the PDF file using standard Acrobat annotations and drawing objects and then subsequently upload these comments and changes to the server.

Notes:

- The Reviewer must be a participant in the review;
- An original copy of the PDF file must be used. If a copy of the PDF file is downloaded from the review it must be downloaded from the 'download copy' link on the Review Control Panel and the 'include comments' option must not be selected;
- Alternatively the original copy could be obtained from email, a shared drive, etc. The origin of the copy is unimportant, as long as it is not the copy of the PDF file displayed in the review browser or a copy with comments and changes already added through PleaseReview;
- It is possible to upload comments and changes in phases. Previously uploaded comments and changes will not be uploaded again. However, any edits to these previously uploaded comments and changes will not be recognized or uploaded. In this case, to ensure the upload of an 'edited' component, the original should be deleted and it should be re-created;
- The plugin is integrated with the common user credentials file for other PleaseTech client tools. Therefore if these are installed it will automatically pick-up the same user credentials.

In the PDF environment the PleaseReview 'upload comments' option will be displayed:





Once the upload button has been selected the user is presented with a server selection screen. From this screen additional servers may be added (which will add them to the common user credentials file). If there is only one server available it will be pre-selected. If there are multiple servers available, the server will need to be selected.

Next, the participant is presented with the review selection. The reviews in which the Reviewer is a participant and which are currently open (i.e. in progress or overdue) are listed in the top panel.

Once the review has been selected the PDF documents in that review will be displayed in the bottom pane. In this example only one PDF file is in the review. Any others would be listed. The Reviewer is also able to set their review status using the radio buttons:

Once the document is selected and the user clicks 'OK' an optional reminder is displayed and the upload commences. Once complete, the upload is confirmed.

In the event the upload fails an error message will be provided and, if appropriate, a further attempt should be made to upload the comments and changes. However, if for example, the review has been closed or completed the PDF file will still contain the comments and changes and a copy of this may be passed to the review Owner by other means.

Title	Due Date	Owner	Status
bbcpdf for test 11th oct	Wed Oct 12 23:45:00...	David Cornwell	In Progress

Select Document in Review

bbc.pdf

Set participant status to: ☒ In progress ☐ Complete

Cancel OK




15.10.2 Acrobat Standard or Professional with PDF Plugin v3


Commenting on PDF documents using the PleaseReview v3 plugin requires a full copy of Acrobat (i.e. Standard or Professional) as well as the v3 plugin. Note: the v3 plugin is supported on Acrobat 5.x, 6.x, 7.x, 8.x and 9.x.


Once installed, the plugin appears on the Acrobat toolbar:







Note: the toolbar may be collapsed. If collapsed only one of the tools will be showing.

If the PDF is text-based, the PleaseReview Text Select tool  can be used. To make a text-based comment, select this tool, click and drag the text upon which you wish to comment (can be from a single word up to many paragraphs) and release the mouse button. The comment window will then pop up.

If the PDF is not text-based or you want to comment on an arbitrary graphic area, the PleaseReview Graphic Select tool  can be selected. To make a graphic-based comment, select this tool, click and drag the graphic rectangle on which you wish to comment (this may also include text) and release the mouse button. The comment box will then pop up.

A general comment can also be created using the  tool.

Note: with PDFs there is a slight difference in display between the  icon on the main toolbar and the  tool on the PDF-specific toolbar. The  icon on the main toolbar will display all comments on the PDF, whilst the  tool on the PDF-specific toolbar, will just display the general comments.

The final tool is 'refresh' . This refreshes the data on the PDF file. This is a 'data only' refresh and does not re-load the PDF file itself.


Comments are added under a top-level Acrobat bookmark 'Comments'. Any existing bookmarks can be found under the top-level bookmark 'Contents'.



15.10.3 PDF as Image

PleaseReview has an in-built capability to convert PDF files into images. This allows users who only have the free Adobe Reader to comment on PDF files. The user needs to select 'Review as images' under user settings (see [User Settings](#)).

PDF files will be presented in the browser as an image and the PleaseReview image commenting capability is available (see [Reviewing Images](#)).

It is possible to open the original PDF from the document download icon () on the toolbar. This will open an original copy of the PDF document. So if, for example, small text is indistinct in the image, the original PDF can be opened from the download document icon, the detail viewed in the PDF and then comments can be made on the image.

Notes:

- Only comments are available to participants using the image commenting functionality;
- There is no zoom capability other than that provided by the browser;
- Any PDF comments which existed on the uploaded PDF will not be shown on the image but will be available if the PDF is opened from the download icon.

15.10.4 Mixed PDF Environments

It is possible for participants on the same review to use different PDF commenting methods.

Participants using the 'PDF as image' option will see comments and changes made by participants using the PDF plugin shown on the image in the correct location with the appropriate icon.

Participants using the PDF plugin will see comments made on the image of the PDF in the correct location.



15.11 Reviewing PowerPoint

PowerPoint slides are displayed as images and the image functionality applies. Slide notes are displayed as text and the Word functionality applies.

15.12 Reviewing Images

To make a comment simply click on the image in the location where you want the comment to appear. The comment window will then open.

15.13 Reviewing Plain Text

To make a comment simply click on the line you wish to comment upon. The comment window will then open.

Plain text files will show proposed changes as mark-up in the document in a similar manner to Word documents.



15.14 Reviewing Source Code

PleaseReview supports the review of source code (and other plain text file types) directly through the standard PleaseReview interface. C, C++, C#, Java, ADA vhd, fortran and xml source are directly supported for syntax highlighting.

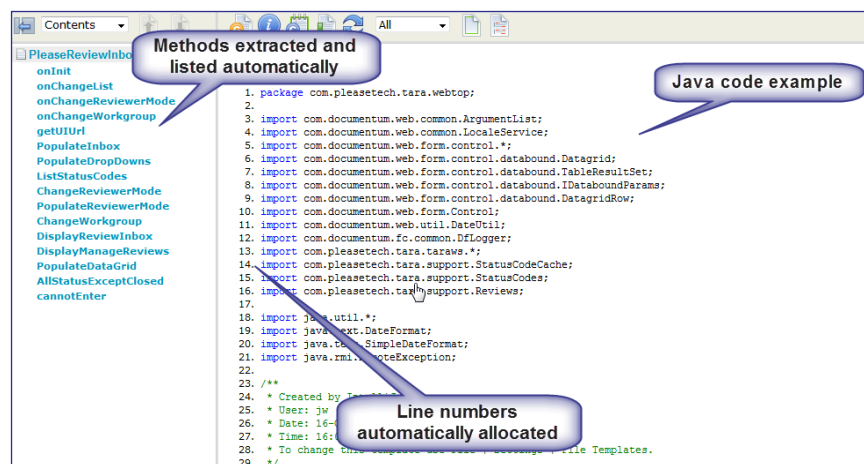
Key features are:

- Syntax highlighting;
- Extraction of method names for a 'table of contents';
- Support for different line endings;
- Any unknown file type may be treated as plain text;
- Split screen view allows the Reviewer to navigate to two different places in the same module at once;
- Document close-out download will automatically update code with accepted proposed changes, and insert PleaseReview comments as comments into the source file.

The code is presented in the right hand 'document pane' with the left hand 'navigation pane' displaying the methods in the code when 'Contents' is selected. The method names are automatically extracted.

To make a comment or propose a change, the Reviewer simply selects the line by clicking on it. The standard PleaseReview comment window (or comment pane) opens. The comment window (or pane) operates as described elsewhere in the manual and permits proposed changes and comments as well as categorization.

Lines with comments and/or proposed changes are identified with the standard PleaseReview icon.



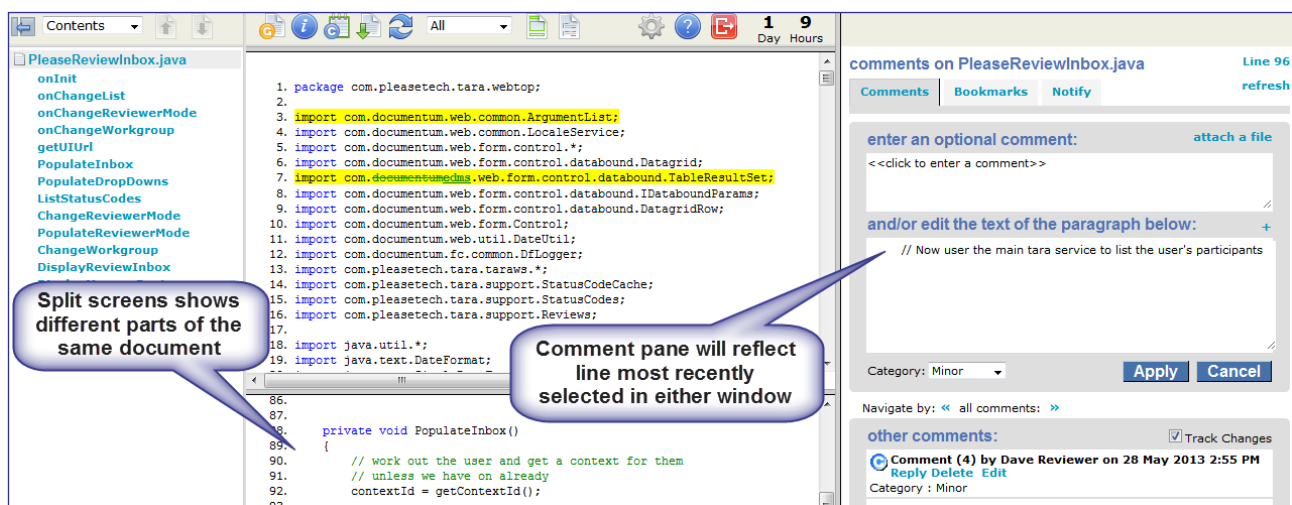


15.14.1 Split Screen View

When reviewing code only, there is the option of a split screen which allows the Reviewer to navigate to two different places in the same module/ document at once.

The split screen view is selected using the 'Layout' view icon on the toolbar.

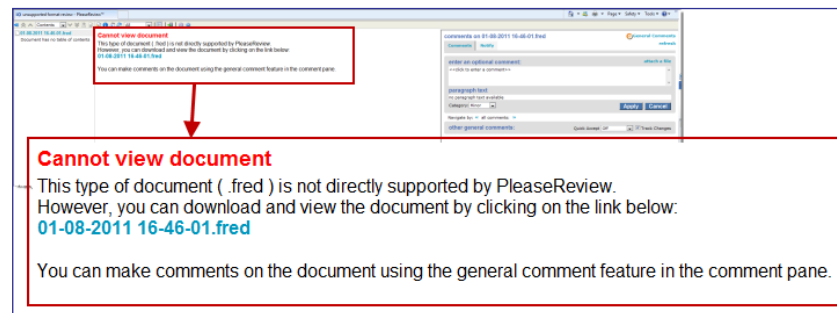
Either screen area may be used for commenting. When you navigate using the navigation pane or comment window, the top pane is scrolled to the correct location. The comment pane (or window) will reflect the line most recently selected.



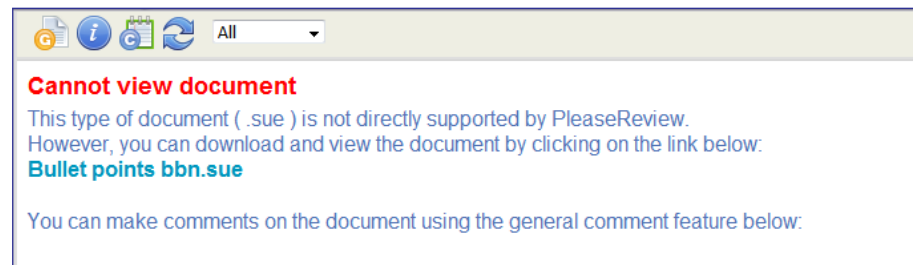


15.15 Unrecognized Document Types

When an unsupported document format is included in a review and a participant accesses it, instead of simply opening the document automatically, they will be presented with a message.



Where the participant is using the pop-up comment window, the general comment window is included in the document view.





16 Leaving the Review and Review Status

When you have finished commenting on a review, you can exit the review by clicking the 'leave review' icon on the toolbar.

You will be prompted to update your status in the review, make any summary comments and set your review 'watch' status:

The screenshot shows a dialog box titled "update your participant status". It contains three sections: a status selection section with radio buttons for "Not started", "In progress" (selected), "Completed", and "Offline"; a text area for "Optional summary comments"; and a dropdown menu for "Email notifications based on review activity" currently set to "any paragraph". Three orange callout boxes point to these sections: "Update status" points to the status selection, "Optional summary comments" points to the text area, and "Email notifications based on review activity" points to the dropdown menu.

Summary comments entered appear on the Review Control Panel and in the comment reconciliation report.

Review Status	Description
In progress	The Reviewer has started reviewing the document(s). This status is set automatically by PleaseReview once you enter the review for the first time. On leaving the review you have the option to leave your status as 'In progress', or to indicate that you have completed your review by selecting 'Completed'.
Completed	The Reviewer has indicated that they have completed their review of the document(s). Note: this is purely a status flag and it is possible for the Reviewer to go back into the review to comment at any time (regardless of this setting) until the Owner has 'Closed' the review.
Offline	The Reviewer is reviewing the document(s) 'Offline'.



Each Reviewer can also set a review 'watch' status:

<div> <div>Send me an email notifying me when there is activity on:</div> <div> <div>any paragraph</div> <div>any paragraph</div> <div>paragraphs where I have commented</div> <div>paragraphs where I have bookmarked</div> <div>paragraphs where I have commented or bookmarked</div> <div>don't send emails</div> </div> </div>	
Watch Setting	Description
Any paragraph	An email is sent if there is any activity on the review (i.e. another Reviewer comments anywhere on the document(s) or responds to another Reviewer's comment, or an Author accepts/closes an item).
Paragraphs where I have commented	An email is sent only if there is any activity on the paragraphs upon which the Reviewer has commented.
Paragraphs where I have bookmarked	An email is sent only if there is any activity on the paragraphs upon which the Reviewer has a private or public bookmark.
Paragraphs where I have commented or bookmarked	An email is sent only if there is any activity on the paragraphs upon which the Reviewer either has commented, or has a private or public bookmark.
Don't send emails	The Reviewer receives no 'watch' emails.

Only one 'watch' email is sent until either the Reviewer re-enters the review or views the reconciliation report.

Notes:

- From this screen the review returns to 'my reviews';
- If you leave the review by closing the browser window, your status will be shown as 'In progress';
- If 'Time in the Review' is enabled, the Reviewer will be prompted to enter a value (in minutes) for the time spent in the review (see [Time in the Review](#)).




17 Document Comparison and Review Linking

PleaseReview provides the ability for document comparison either between documents in the same review, or between documents in different reviews. Document comparison is available for Microsoft Word documents only.

17.1 Document Comparison (Comparing Documents within a Review)

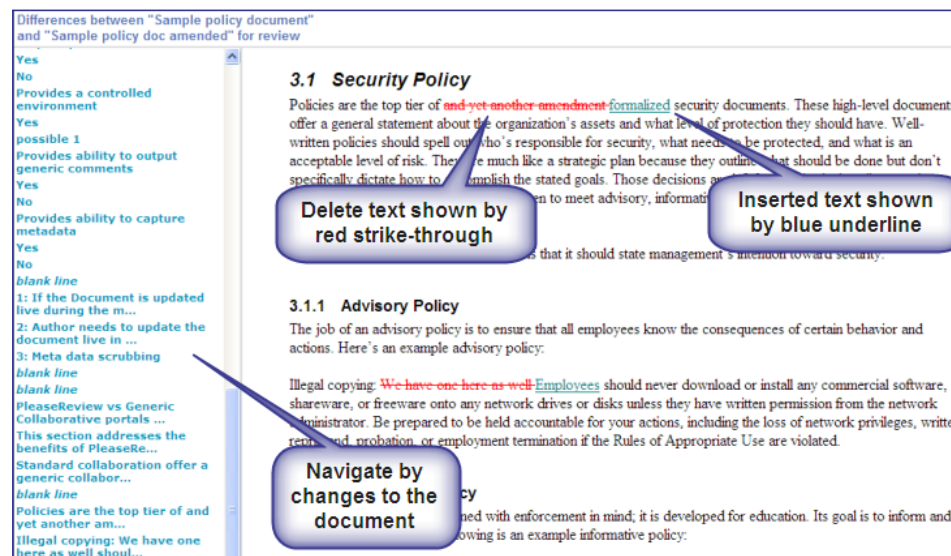
Document comparison allows Reviewers to see the changes between the document under review and the previous iteration.

Clicking the 'show comparison'  icon on the toolbar opens a separate window which displays the differences between the documents as tracked changes.

The paragraphs with differences are identified in the navigation pane which allows users to navigate rapidly through the differences.

Text shown in red with strike-through is present in the comparison document but not in the document currently under review.

Text shown with a blue underline is present in the document currently under review but not in the comparison document.



Notes:

- Comparison must be enabled by the review Owner during review set-up;
- The changes in the TOC (table of contents) are not included in the listing of changes in the navigation pane on the left;
- If there is no 'show comparison' icon on the toolbar, document comparison is not available.



17.2 Review Linking (Comparing Documents between Reviews)

Review linking allows Reviewers to see the changes between documents in different reviews.

If the review is linked to another (typically a review of a previous version of the document set), there will be a 'show linked review' icon

 in the toolbar.

Clicking the link icon will open the linked review in a new window. The full functionality of that review is available.

Notes:

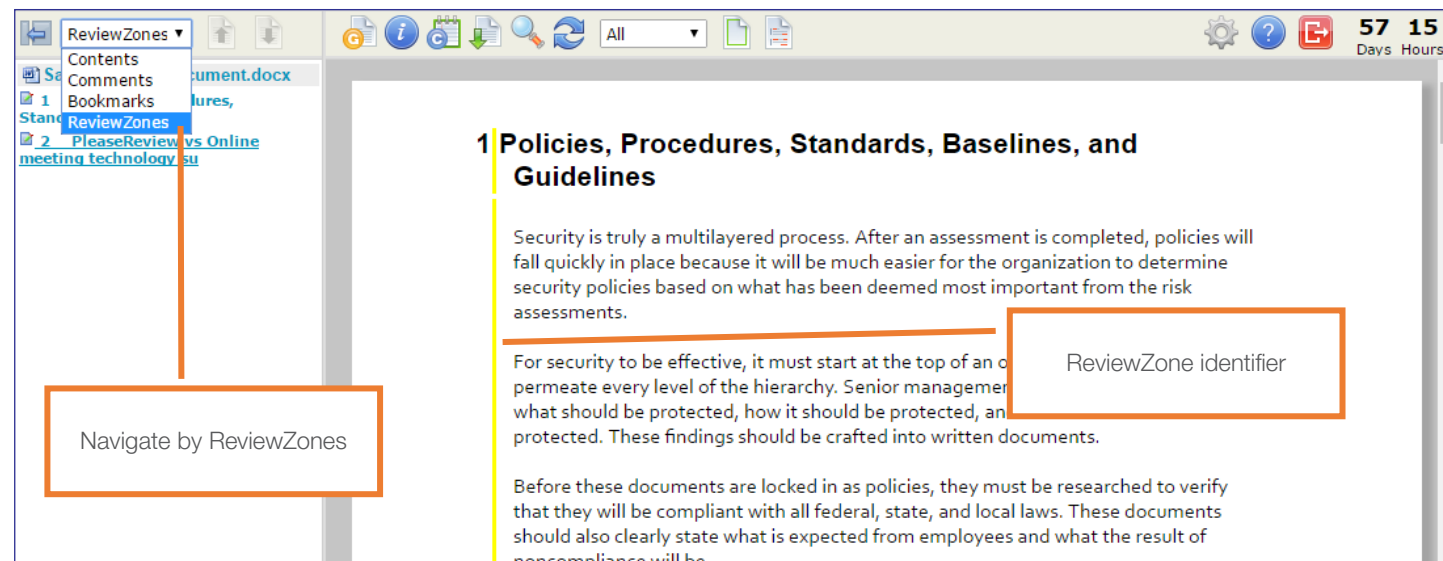
- Linking must be enabled by the review Owner during review set-up;
- If there is no linked review icon on the toolbar, the review is either not linked or you do not have permission to see the linked review.



18 Using ReviewZones

ReviewZones are areas of a Word document which the review Owner can setup to assign different Reviewer permissions to different users. This could be to prevent individual users from commenting or marking-up changes to specific zones, or even prevent users from viewing certain zones.

ReviewZones are identified in the document by a vertical yellow line in the left hand margin:



ReviewZones will be also be visible in the left hand navigation pane when navigating by ReviewZones.



The 'Zones' tab of the comment window will provide full information including permissions for the zone:

zones on Sample policy document.docx Paragraph Id 3
refresh

Comments Bookmarks **Zones** Notify

Type ReviewZones ▼

Type ReviewZones

Title 1 Policies, Procedures, Standards, Baselines,

Paragraph range 1 to: 11

Description

Make read only for everyone ☐

Name	Email	Permission
Ben Demo	ben.demo@pleasetech.com	Reviewer ▼
Caleb Demo	Caleb.Demo@pleasetech.com	Reviewer ▼
Daniel Demo	daniel.demo@pleasetech.com	Viewer ▼
Ephraim Demo	ephraim.demo@pleasetech.com	Hidden ▼

Navigate by: << reviewzones >>

Ensure 'ReviewZones' selected

Permission settings for selected ReviewZone

Note - If your permission is set to 'Hidden' for the entire document the option to download the document from the review will be disabled.

For further information about ReviewZone permissions, see [Enabling/Creating ReviewZones](#).



19 Delegation

It is possible for a user to delegate their role on a review to another user in the same Workgroup. The extent of delegation allowed depends upon the user's role within the Workgroup.

19.1 Simple Delegation

All review participants can delegate their role on the review if allowed by the review Owner.

To delegate click on the 'Delegate' option on the Review Control Panel.

The 'Delegate' option will display the delegation screen where you can search for users individually or display all available users in the Workgroup:

Delegate
Everyone ▾

Name ↕	Email	Delegate User
Bob Contributor	contrib2@demo.com	Select
Tim Reviewer	Reviewer3@demo.com	Select

The user you are delegating to must already be in the current workgroup. Locate them by entering part of either their user name, email address or full name and pressing "go". This will bring back users starting with the value you entered.

If you want to search for users containing certain characters, use * as a wildcard. for instance, entering *jones will return users ending in jones; entering *jones* will bring back all users containing jones.

Back

Click on 'Select' against the participant that you would like to delegate to. The next screen will allow you to insert a message to the selected delegate, which will be included in the email notification sent to the delegated participant.

review control panel - delegation

delegation (id 517)
Review Status In Progress (Due: 28 Sep 2012)

participants

Name	Status
Clare Reviewer	Not Started
Dave Reviewer	Not Started
Jason Contributor	Not Started
Sue Author	Review Owner

your comments
Document
Sample CTR cut down version.doc

Status Download copy Notify **Delegate**



Notes:

- If the delegate option is not available at the Review Control Panel, the review Owner may have disallowed it when setting up the review;
- At the delegate screen only users that are NOT already in the review will be listed;
- It is not possible for a Delegator to delegate to a user with a lesser role than themselves in the Workgroup i.e. an Author cannot delegate to a user that only has Reviewer permissions;
- Once delegation is complete it is not reversible by the person who delegated; they will no longer be active in the review and their status will be set to 'Completed'. If required, the review Owner can edit the user details to re-activate them as a Reviewer.

review control panel - delegation

delegation (id 517)

Review Status Over 27 Sep 2012 16:17 [Extend deadline](#)

participants δ = a delegated participant

Name	Status	Role	Summary	Comments
Clare Reviewer	Not Started	Reviewer		0
Dave Reviewer	Completed	Reviewer	Delegated to Tim Reviewer	0
Jason Contributor	Not Started	Reviewer		0
Sue Author	Review Owner	Owner		0
Tim Reviewer δ	Not Started	Reviewer		0

comment summary

Document	Open	Accepted	Closed	Withdrawn
Sample CTR c	0	0	0	0

[Printable View](#) [Show URLs](#) [Email Status](#) [Edit Details](#) [Delete Review](#)
[Status](#) [Download copy](#) [Notify](#)

[View Report](#) [Enter Review](#) [Review Closeout](#) [Back](#)

Annotations:

- Original participant's status is set to completed (points to Dave Reviewer)
- New participant has 'delegate' symbol (points to Tim Reviewer δ)
- Summary and Role updated (points to Dave Reviewer's Summary)



19.2 Managerial Delegation

Users with a minimum Workgroup role of Reviewer, and Delegator can delegate to more than one other participant whilst remaining active on the review themselves. The Delegator role also allows the user to set up personal distribution lists (see [Creating Distribution Lists](#)).

The ability for a review participant to delegate/add additional participants to a review is managed by the review Owner. If managerial delegation is enabled by the review Owner, the review participant can add additional participants to the review via the Review Control Panel, using the 'Add Participants' option:

review control panel - managerial delegation 1

managerial delegation 1 (id 565)

Review Status In Progress (Due: 3 Oct 2012 23:45; Started: 2 Oct 2012 11:39)

participants

Name	Status	Role	Summary	Comments
Clare Reviewer	Not Started	Reviewer		0
Dave Reviewer	Not Started	Reviewer		0
Sue Author	Review Owner	Owner		0

your comments

Document	Open	Accepted	Closed	Withdrawn
Sample CTR (3_5).doc	0	0	0	0

[Status](#) [Download copy](#) [Notify](#) [Delegate](#) [Add Participants](#)

[View Report](#) [Enter Review](#) [Back](#)



The 'Add Participants' option will display the following screen where you can search for users individually, display all available users in the Workgroup or select personal distribution lists:

participants already included on this review:

Name	Email	Role	Details	Participant
Clare Reviewer	reviewer2@demo.com	Reviewer		
Dave Reviewer	reviewer1@demo.com	Reviewer		
Sue Author	author@demo.com	Owner		

Delegate
Everyone ▾

Name ^	Email	Delegate User
Bob Contributor	contrib2@demo.com	<input type="checkbox"/>
Jason Contributor	contrib1@demo.com	<input type="checkbox"/>
Tim Reviewer	Reviewer3@demo.com	<input type="checkbox"/>

Select All Deselect All Add

OK Back

Select all participants that you would like to add to the review and click 'Add'. The selected participants will then be added to the top list 'participants already included on this review'. Edit and Remove options will be available but only against the newly added participants.

The Review Control Panel will display the newly added users with the 'delegate' symbol but, unlike with simple delegation, the delegator will still be an active participant in the review. Hovering over the 'delegate' symbol will provide details of who added the participant.



20 Notify and Review Watching

20.1 Notify

The 'Notify' tab (if available) allows review participants to send an email, including a link to the individual paragraph/location together with personal comments, to selected review participants. This makes it easy to draw another participant's attention to a specific paragraph/location. Note: This is currently only available in the PleaseReview classic interface.

The email text is customizable for each installation. However, the email will show you as the sender (unless PleaseReview is set up to send generic emails, in which case the email will have come from the generic system email address), and will include your text and a link to the paragraph/location.

The email subject is pre-populated but may be edited, your message is entered into the 'email body' area, the review participants are selected and the 'Send' button is clicked to send the email. Please note that you are not given a preview. The email is sent immediately when you click the 'Send' button and you will receive confirmation that the emails have been sent.

There is also a 'Notify' option on the Review Control Panel. The difference is that the link in the email generated by this option takes the user to the review itself, and not to an individual paragraph/location in a document.

A screenshot of the 'notify paragraph on Sample policy document.doc' interface. The title bar shows 'notify paragraph on Sample policy document.doc' and 'Paragraph Id 98'. The interface has four tabs: 'Comments', 'Bookmarks', 'Zones', and 'Notify'. The 'Notify' tab is active. Below the tabs, there are two main sections. The first section is 'email subject' with a text input field containing 'Paragraph notification - Review of "EditZones"'. Below that is the 'email body' section with a large text area containing 'Your message here'. The second section is 'select participants' with a list of participants: 'Bob Auth-Contrib', 'Jason Contributor', 'Sue (watching)', and 'Tim SuperContributor'. Each participant has a checked checkbox. Below the list are 'Select All' and 'Deselect All' buttons. A callout bubble points to 'Sue (watching)' with the text 'Watch status on this paragraph/location indicated'. At the bottom right are 'Send' and 'Close' buttons.

20.2 Review Watching

The 'Notify' tab (if available) also provides an insight into which participants are 'watching' a particular paragraph/location. Participants 'watching' the paragraph/location are identified by the words '(watching)' after their name on the participants list.

Chapter Six

Reporting

21 The Reconciliation Report

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21 The Reconciliation Report

The reconciliation report is available from the Review Control Panel. It can also be accessed from within the review interface.

The report will open in a new browser window and contains all information relating to the review including a record of all comments, proposed changes, and discussion threads, the status of all comments and proposed changes, and any Author comments.

Report download

Document download

Link back to review

[Select Comments](#)
[Print](#)
[Close](#)

report for review Quality Assurance Policy Review

report generated for Helen Harris on 21 Sep 2016 16:05

summary

Title	Quality Assurance Policy Review (Id 3591)
Description	As part of our annual review of all policy documents.
End Date	7 Nov 2016 23:45
Review Status	In Progress

participants

Name	Status	Role	Summary	Comments	Last Activity
Helen Harris	In Progress	Owner		2	21 Sep 2016 16:04
Joe Jones	In Progress	Reviewer		5	19 Sep 2016 12:58
Mike Malone	In Progress	Reviewer		5	21 Sep 2016 12:52

T (Type) - B = Bullet, C = Comment, P = Proposed Change, R = Rating
S (Status) - A = Accepted, C = Closed, O = Open, W = Withdrawn, M = Merged

[download all reports](#)

report for Sample policy document.docx (Sample policy document.docx)

[download document with paragraph numbers](#) [download report as word](#)

Para	Text	T	Comment	S	Author Comment
G	(General Comment)	C	Comment (14) by Helen Harris on 21 Sep 2016 16:04 Category : Minor Helen Harris (21 Sep 2016 16:04) Version control...	O	
1	Policies, Procedures, Standards, Baselines, and Guidelines				
3	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.	P	Proposed Change (7) by Mike Malone on 3 Aug 2016 11:21 Category : Minor Security is truly a multilayered process. After an assessment is completed, policies will fall quickly in place because it <u>will be much is</u> easier for the organization to determine <u>and prioritize</u> security policies based on what has been deemed most important from the risk assessments. Mike Malone (3 Aug 2016 11:21)	A	Helen Harris (19 Sep 2016 14:46): Accepted
		P	Proposed Change (1) by Joe Jones on 3 Aug 2016 10:43 Category : Minor Security is truly a multilayered process. After <u>an a risk</u> assessment <u>is has been</u> completed, policies will fall <u>quickly</u> in place because it is easier for the	O	

Review details

Participant details

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PleaseReview 6.1 Oracle Documents Cloud Integration User Manual Version 1.0



21.1 Customizing the Report

The 'Select Comments' button allows you to customize the report:

Select comments by:

Document

☒ All
☒ Sample policy document.docx
☒ Sample Spreadsheet.xlsx
☒ Sample PowerPoint Slides.pptx
☒ PleaseReview v5.2 Quick Guide to Roles.pdf

Status

☒ All ☒ Closed ☒ Accepted ☒ Open

Type of comment

☒ All ☒ General ☒ Comment ☒ Proposed Change

Comment category

☒ All ☒ Minor ☒ Typo ☒ Major ☒ Cosmetic ☒ <Blank>

Participant

☒ All
☒ Adam Demo
☒ Ben Demo
☒ Caleb Demo
☒ Daniel Demo
☒ Ephraim Demo
☒ Frank Demo
☒ Gideon Demo

☒ Made a comment
☐ Participated in discussion

Date

☒ All
☐ Since I viewed the reconciliation report 21 Sep 2016 12:58 ▾
☐ Since:

date :

time : 00 ▾ 00 ▾

< September 2016 >

Mon	Tue	Wed	Thu	Fri	Sat	Sun
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Show Track Changes

☒ Show Proposed Changes as tracked

[Return to default](#)

Ok

Cancel



21.2 Document Formats

There are minor differences with respect to the information given depending on the document type.

21.2.1 Word

The reconciliation report for a Microsoft Word document contains a paragraph identifier, the original paragraph text, the comment type, the associated comments, the comment status and associated Author reconciliation comment.

An indication is given as to the Word heading level for all entries. This allows for easy identification of where the paragraph is located in the document.

The paragraph number and the comment type are hyperlinks which open the review in the main window (not the report window). The paragraph number link scrolls the document to the comment location. The comment type link scrolls the document to the comment location and opens the comment window.

The Word download option (top left hand side of the main table) allows:

- A copy of the Word document to be downloaded with each paragraph numbered in square brackets and colored blue. In a 'print' situation (i.e. no online access to the system), this allows the matching of a paragraph in the reconciliation report to its exact location in the document.
- A copy of the reconciliation report as a Word document.

21.2.2 PDF

The reconciliation report for a PDF document contains a scaled-down copy of each page where there are comments, complete with numbered comment locations (shown in the comment summary below each page). Where the comment is on a graphic area, the original paragraph text is replaced by the word '(Area)'.

21.2.3 Excel

The reconciliation report for an Excel spreadsheet contains a sheet name and cell reference identifier, the original cell content, the comment type, the associated comments, the comment status and associated Author reconciliation comment.



21.2.4 PowerPoint

The reconciliation report for a PowerPoint document contains a scaled-down copy of the slides with comments, complete with numbered comment locations (shown in the comment summary below each slide). Comments on the slide notes display with the relevant slide number.

21.2.5 Image

The reconciliation report for an image contains a scaled-down copy of the image with comments, complete with numbered comment locations (shown in the comment summary)..

Chapter Seven

Review Closeout

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22 Accepting and Closing Comments in V6.1

This section relates to accepting and closing comments and proposed changes in the PleaseReview V6.1 interface. If you are configured to use the PleaseReview classic interface, refer to [Accepting and Closing Comments in the Classic Interface](#).



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 whilst the review is 'In Progress' or after the review has been 'Closed' by the review Owner, but not when the review status is 'Completed'.

The purpose of accepting and closing is threefold:

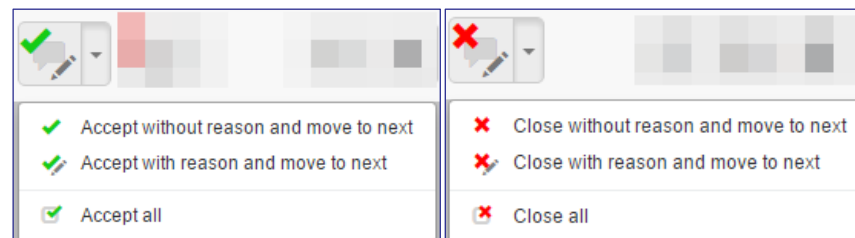
- 1) It allows a comment or discussion thread to be closed-off in a manner which all Reviewers can see;
- 2) It provides feedback for the comment reconciliation report;
- 3) It allows for the control of the behavior of comments and proposed changes when they are included in the resulting Word and PDF document (or report, for other document formats).



22.1 Accepting and Closing using the Toolbar



The 'Accept' icon () and 'Close' icon () 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 prompt for a reason using the filter options available from the icons:



Notes:

- Selecting the 'Accept with reason and move to next' will allow the Author/Owner to accept a comment or change, enter a reason and then move to the next open comment or change in the review;
- Selecting the 'Accept without reason and move to next' will provide a 'one-click' action for accepting comments and proposed changes, allowing the Author/Owner to accept a comment or change without giving a reason and move to the next open comment/change in the review;
- It is possible to change the prompt for a reason preferences as required, and therefore the Author/Owner can alternate between settings if appropriate;
- The 'Accept all' option will allow the Author/Owner to accept all open comments and changes at once. See [Accept/Close All](#);
- The settings for 'Close' work in the same way as described above.

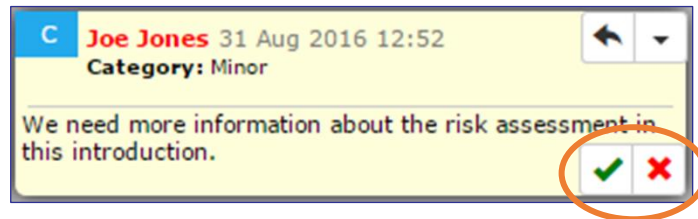
Once the preference has been set, the Author/Owner can simply click either the 'Accept' icon () or 'Close' icon () on the toolbar for each comment/change in the review. As soon as a comment or proposed change has been accepted/closed, PleaseReview will automatically jump to the next open comment/change in the review. This allows the Author/Owner to move quickly through all open comments and proposed changes in the review, based on their filter settings.



22.2 Accepting and Closing using the Quick Accept/Close Icons

The 'Quick Accept' icon (✓) and 'Quick Close' icon (✗) displayed on each open comment or 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 when the Author/Owner hovers over or selects a comment or proposed change in the review pane:



Once the quick accept or quick close icon has been selected, the Author/Owner may have the option to enter a reason depending on their 'Give Reason' setting (see [V6.1 Review User Settings](#)).

Notes:

- If 'Give Reason' is set to 'Never', the Author/Owner can accept/close comments using the quick accept and quick close icons with one click;
- If 'Give Reason' is set to 'Close only', the Author/Owner will only be prompted for a reason when closing comments and changes;
- If 'Give Reason' is set to 'Always', the Author/Owner will always be prompted for a reason when accepting or closing comments and changes.



Where 'Give Reason' is set to 'Always' or 'Close only', a new window will open which allows the Author/Owner to select a reason from the drop-down list:

A screenshot of a dialog box titled "Reason For Closing" with a tab indicator "#11". It features a drop-down menu with the following options: "Closed", "Rejected", "Revised", "Superseded", "Noted", "No Action Required", and "<Blank>". The "Closed" option is currently selected and highlighted in blue.

Note: The drop-down list is site-configurable.

The Author/Owner also has the option to leave additional notes:

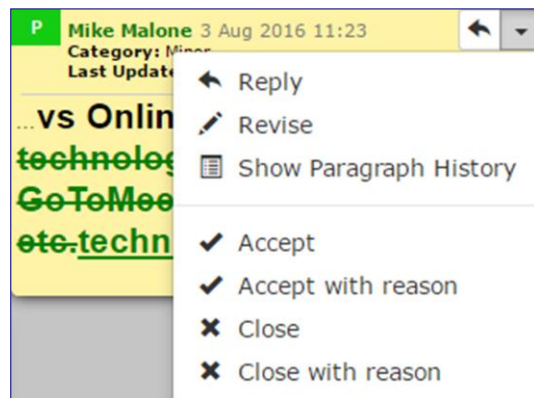
A screenshot of the "Reason For Closing" dialog box, tab "#11". The "Closed" option is selected in the drop-down menu. Below the menu is a text area containing the note: "This is covered in the risk assessment policy. I will add a cross-reference to the document." At the bottom left, there is a "Minor" severity selector. At the bottom right are "Apply" and "Cancel" buttons.



22.3 Accepting and Closing using the Actions Menu

The actions menu displayed on each open comment or proposed change can be used to accept/close comments and proposed changes, either with or without giving a reason.

The actions menu is a drop-down menu which can be seen in the top right corner when the Author/Owner hovers over or selects a comment or proposed change in the review pane:



Irrespective of the 'Give Reason' setting (see [V6.1 Review User Settings](#)), the Author/Owner can choose whether to accept/close the comment/change either with or without giving a reason.



Notes

- If 'Accept' or 'Close' is selected, the Author/Owner can accept/close with one click;
- If 'Accept with reason' or 'Close with reason' is selected, the Author/Owner will be prompted to select a reason and will be able to leave additional notes;
- The behavior of the 'Give Reason' dialog box is the same as described above (see [Accepting and Closing using the Quick Accept/Close Icons](#)).

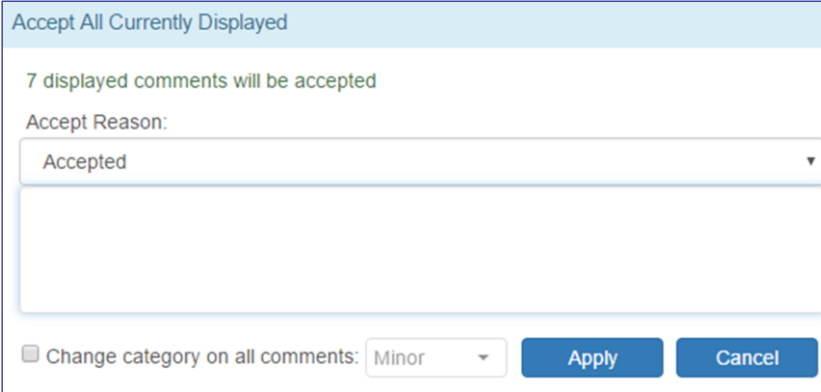


22.4 Accept/Close All

Authors/Owners are able to accept or close all (or a defined subset of) open comments and proposed changes at once.

The 'Accept all' option is located within the 'Accept' icon () and the 'Close all' option is located within the 'Close' icon () on the PleaseReview toolbar (see [Accepting and Closing using the Toolbar](#)).

When the 'Accept all' or 'Close all' option is selected, a new dialog box will open allowing you to enter a reconciliation comment:



The dialog box titled "Accept All Currently Displayed" shows that 7 displayed comments will be accepted. It includes an "Accept Reason:" dropdown menu currently set to "Accepted", a large text area for a reconciliation comment, and a checkbox labeled "Change category on all comments:" with a dropdown menu set to "Minor". At the bottom are "Apply" and "Cancel" buttons.

The dialog box displays how many comments and changes are affected.

To select a subset of comments/changes to accept or close, you can first apply a filter using the filter icon on the toolbar. For example, applying a filter to display only comments and changes with the category of 'minor', followed by selecting the 'Accept all' option will result in all open comments and changes with the category of 'minor' being accepted.

Notes:

- Only non-conflicting proposed changes will be accepted/closed. Any conflicting changes will be ignored by the accept/close all process;
- It is possible to change the category of comments and proposed changes in the 'Accept all' and 'Close all' dialog box.



22.5 Accepted/Closed Comments

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

The option to 'Re-Open' an accepted or closed comment/change will be available from the actions drop-down menu visible in the top right corner when hovering over or selecting the comment/change in the review pane:

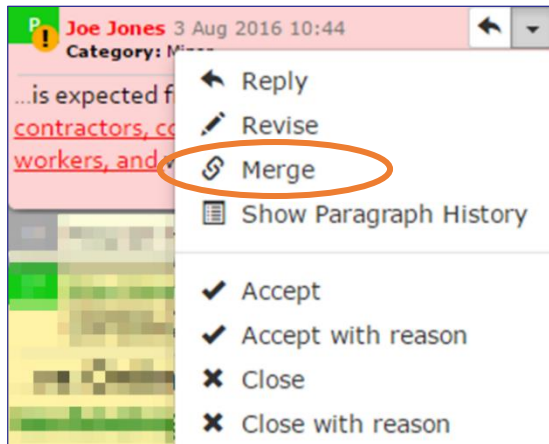
Notes:

- Where there are conflicting proposed changes on a paragraph, the 'Merge' option should be used. See [Conflicting Changes](#);
- When there are accepted, closed or merged comments/changes on a paragraph a single information comment is displayed;
- 'Give Reason' is a system configuration setting and therefore may be disabled.



22.6 Conflicting Changes (Word Only)

If there are conflicting proposed changes on a paragraph, the comment will be shaded red and the 'P!' icon will display. In such instances, a 'Merge' option will be available on the actions menu:





Selecting 'Merge' will open the merge window:

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 policies 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 ~~what is expected from employees~~ employee responsibilities and ~~what the result implications of noncompliance will be~~ noncompliance.

Existing proposed changes

Change ID	Author	Timestamp	Status	Content
#16	Mike Malone	19 Oct 2016 14:51	Checked	...also clearly state what is expected from employees employee responsibilities and what the result implications of noncompliance will be noncompliance.
#15	Helen Harris	19 Oct 2016 14:02	Not Checked	...is expected from employees all staff and what the...
#12	Mike Malone	19 Sep 2016 12:56	Checked	Before these documents policies are locked in as policies finalized , they must...
#3	Joe Jones	3 Aug 2016 10:44	Not Checked	...is expected from employees employees, contractors, consultants, temporary and other workers, and what the result...

Apply Apply+Accept Cancel

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

Tracked changes view of the merge result above.

Checked changes are included in the merge result above.



The merge window displays the merge result, provides a check-box option to select/deselect the inclusion of proposed changes in the merge, and allows manual editing of the merge result.

The Author/Owner should 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.

Clicking the 'Apply+Accept' button will apply the changes into a new merged proposed change, attributed to the Author/Owner, and is automatically accepted. All other proposed changes on the paragraph will be marked as 'Merged' with the reason "This change was merged into another one":

Px

Joe Jones 3 Aug 2016 10:44

#3

Category: Minor

Merged by: Helen Harris 19 Oct 2016 15:06

Reason: This change was merged into another one

Before these documents are locked in as policies, 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~~ employees, contractors, consultants, temporary and other workers, and what the result of noncompliance will be.



22.7 Comment Categorization

If the comment categorization feature is enabled, the Author/Owner will be able to re-categorize the comment or proposed change during the accept/close process. This is achieved using either the 'Accept with reason' or 'Close with reason' option which will open the 'Give Reason' dialog box. The Author/Owner can then select a new comment category from the drop-down list:

The screenshot illustrates the 'Reason For Accepting' dialog box and a comment record. The dialog box, titled 'Reason For Accepting' with a '#5' icon, features a dropdown menu currently set to 'Accepted'. Below this is a text area containing the message 'Reviewer category will appear as default'. At the bottom left of the dialog is a dropdown menu for selecting a comment category, currently showing 'Minor'. This menu is open, displaying options: 'Minor', 'Typo', 'Major', 'Cosmetic', and '<blank>'. An orange arrow points from the 'Minor' option in the dropdown to the 'Accepted' dropdown in the dialog. Another orange arrow points from the 'Cosmetic' option in the dropdown to a text box labeled 'Select new comment category'. The dialog also includes 'Apply' and 'Cancel' buttons. Below the dialog, a comment record is shown with a green checkmark icon, the name 'Joe Jones', and the timestamp '3 Aug 2016 10:45'. The record details include 'Category: Cosmetic (Original category: Minor)' and 'Accepted by: Helen Harris 19 Oct 2016 15:16'. An orange arrow points from the 'Category' field to a text box labeled 'Re-categorization recorded'. The record also includes an 'Image:' field.



22.8 Making New Comments or Proposed Changes

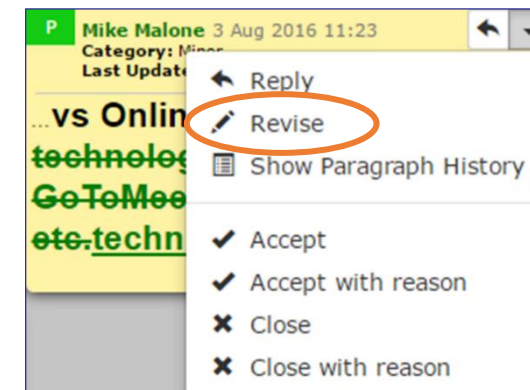
If an Author/Owner makes a new comment, proposes a new change or revises an existing change they have the additional option of 'Apply+Accept'. This means that the comment or change will automatically be accepted as soon as it is applied:

A screenshot of the PleaseReview interface showing a comment box. The comment text reads: "Security is truly a multilayered process. After an assessment is completed, policies will fall quickly in place because it is easier for the organization to determine and prioritize security policies based on what has been deemed most important from the risk assessments." Below the text is a text input field with the placeholder "Enter your comment here...". At the bottom of the box are three buttons: "Minor" (a dropdown menu), "Apply", and "Apply+Accept" (which is circled in orange), and "Cancel".

22.9 Revising Proposed Changes

In addition to 'Accept' and 'Close', each proposed change in a Microsoft Word document has the option to 'Revise':

Selecting 'Revise' will allow the Author/Owner to edit the proposed change. If the Author/Owner applies the edits, PleaseReview automatically closes the original proposed change with an appropriate close reason being given and creates a new proposed change (attributed to the Author/Owner) with the revised text. This maintains the integrity of the audit trail.





23 Accepting and Closing Comments in the Classic Interface

This section relates to accepting and closing comments and proposed changes in the PleaseReview classic interface. If you are configured to use the PleaseReview V6.1 interface, refer to [Accepting and Closing Comments in V6.1](#).

Participants with the role of Author or Owner in a review are able to accept and close comments and proposed changes.

The purpose of accepting and closing is threefold:

- 1) It allows a comment or discussion thread to be closed-off in a manner which all Reviewers can see;
- 2) It provides feedback for the comment reconciliation report;
- 3) It allows for the control of the behavior of comments and proposed changes when they are included in the resulting Word and PDF document (or report, for other document formats).

Comments and proposed changes can be accepted and closed whilst the review is 'In Progress' or after the review has been 'Closed' by the review Owner, but not when the review status is 'Completed'.

To accept or close comments or proposed changes, the Author/Owner should enter the review and open the comments window as if making or viewing a comment/proposed change.

In addition to the standard options available, the Author/Owner will have 'Accept' and 'Close' options for each comment and proposed change:





Once accepted or closed, the Author/Owner has the option to select a reconciliation comment (reason) from the drop-down list, and leave additional notes. Note: The option to select a reconciliation comment depends on the '[Give Reason](#)' setting.

Comment (2) by Ben Demo on 19 May 2016 16:07
Category : Minor
Enter a reconciliation comment (reason):
Closed
Rejected
Revised
Superseded
Noted
No Action Required
<Blank>
Category below:
Close Cancel

The drop-down list is site-configurable.

Once accepted or closed, the status of the comment/proposed change is updated and clearly displayed:

Comment (2) by Ben Demo on 19 May 2016 16:07 Re-Open
Category : (Original category : Minor) **Closed by Adam Demo: 6 Jun 2016 12:09**
Closed: This is covered in the employment contract and employee handbook.
Ben Demo (19 May 2016 16:07)
Need a section for policy compliance

The option to 'Re-Open' a comment or proposed change will be available for all comments and the most recent change accepted/closed on a paragraph.

Note: Only one proposed change can be accepted per paragraph. If there are multiple proposed changes on the paragraph, accepting one will automatically close the others. For more information, see [Merging Proposed Changes](#).



23.1 Give Reason

If enabled, the 'Give Reason' setting can provide a 'one click' accepting/closing of comments and proposed changes. Adjacent to the 'other comments' area is the 'Give Reason?' drop-down box:

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

Notes:

- It is possible to turn 'Give Reason?' on/off as required, and therefore the Author can alternate between settings for each comment/change if appropriate;
- The same logic applies to withdrawing a comment. There is no prompt for a withdrawal reason if 'Give Reason?' is set to 'Never';
- 'Give Reason?' is a system configuration setting and therefore may be disabled.

23.2 Comment Categorization

If the comment categorization feature is enabled, the Author/Owner will be able to re-categorize the comment or proposed change during the accept/close process:

Comment (4) by Demo Reviewer 1 on 18 May 2009 13:16 [Re-Open](#)

Category : Cosmetic (Original category : Minor) **Accepted by Demo Owner: 29 May 2009 10:37**

Accepted: Because although its cosmetic not minor we should note it

Demo Reviewer 1 (18 May 2009 13:16)
This is a comment

Demo Reviewer 3 (18 May 2009 13:16)
This is my reply

Re-categorisation recorded



23.3 Making New Comments or Proposed Changes

If an Author/Owner makes a new comment, proposes a new change or revises an existing change they have the additional option of 'Apply+Accept'. This means that the comment or change will automatically be accepted as soon as it is applied:

A screenshot of a review interface showing four buttons: 'OK', 'Close', 'Apply', and 'Apply+Accept'. The 'Apply+Accept' button is circled in red, indicating it is the recommended action for automatic acceptance.

23.4 Editing Proposed Changes

In addition to 'Accept' and 'Close', each proposed change has the option to 'Revise':

A screenshot of a 'Proposed Change' entry. The title is 'Proposed Change (3) by Demo Reviewer 3 on 15 May 2009 17:24'. Below the title are links for 'Reply', 'Accept', 'Revise', and 'Close'. The 'Revise' link is circled in red. The category is 'Minor'. The text of the change is: 'For security to be effective, it must start at the top of this is another change an organization. It must permeate every level of the hierarchy. Senior management must make decisions on what should be protected, how it should be protected, and to what extent it should be protected. These findings should be crafted into written documents.'

Selecting 'Revise' will allow the Author/Owner to edit the proposed change. If the Author/Owner applies the edits, PleaseReview automatically closes the original proposed change with an appropriate close reason being given and creates a new proposed change (attributed to the Author/Owner) with the revised text. This maintains the integrity of the audit trail.



23.5 Merging Proposed Changes (Word Only)

When a paragraph has multiple proposed changes, or if you want to accept more than one proposed change on a paragraph, the 'Merge' option in the proposed change actions should be used.

Accepting a single proposed change will automatically close all other open changes on the paragraph.

Selecting 'Merge' will open the Merge window:

Edit merged text if required

Font family: [dropdown] | B | I | U | X | x | NB | SP

3 [BR] PleaseReview versus Generic Collaborative portals

Select comment category: Minor

Merge result Refresh

3 [BR] PleaseReview ~~vs~~ Generic Collaborative portals (such as eRoom etc).portals

existing proposed changes

- ☒ Proposed change (49) by Ben Demo on 6 Jun 2016 15:56
3 [BR] PleaseReview ~~vs~~ Generic Collaborative portals (such as eRoom etc).
- ☐ Proposed change (48) by Adam Demo on 6 Jun 2016 15:19
3 [BR] PleaseReview ~~vs~~ Generic Collaborative ~~versus~~ portals (such as eRoom etc)eRoom).
- ☒ Proposed change (14) by Frank Demo on 20 May 2016 14:50
3 [BR] PleaseReview vs Generic Collaborative portals (s eRoom etc).portals

Apply+Accept OK Cancel

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

Tracked changes view of the merge result above.

Checked changes are included in the merge result above.



The merge window displays the merge result, provides a check-box option to select/deselect the inclusion of proposed change/s in the merge, and allows manual editing of the merge result.

Notes:

- If there is a conflict between changes (i.e. one change overlaps another change) then PleaseReview will not attempt to resolve the conflicting paragraphs. The most recent change will be selected. The Author/Owner can include either of the conflicting paragraphs in the merge result using the select/deselect check-boxes and make additional changes in the merge result box;
- The Author/Owner may edit the merge result. Clicking on the 'Refresh' button will always update the tracked changes view of the merge result.

The operation of the merge window buttons is as follows:

Button	Effect
Refresh	Includes manual edits in the merge result.
OK	Applies the changes into a new merged proposed change, attributed to the Author/Owner, and leaves this resulting new proposed change 'Open'. This means:
	<ul style="list-style-type: none">• All other proposed changes included in the merge are closed with the comment "Merged: This change was merged into another one";
	<ul style="list-style-type: none">• In order to apply the new proposed change, the Author/Owner needs to accept it in the normal manner.
Apply+Accept	Applies the changes into a new merged proposed change, attributed to the Author/Owner, and opens the 'Accept' dialog so the Author/Owner can accept the change. Once the merge has been accepted, all other proposed changes on the paragraph are closed with the comment: "Merged: This change was merged into another one".



23.6 Accept/Close All

Authors/Owners are able to accept or close all comments at once. In the comment window above the 'Other Comments' section is the 'Accept/Close all' option.

This will open the comment selector window allowing you to select/de-select types of comments, and enter a reconciliation comment.

Select comments by:

Status

☐ All
 ☐ Closed
 ☐ Accepted
 ☒ Open

Type of comment

☒ All
 ☒ General
 ☒ Comment
 ☒ Proposed Change

Comment category

☒ All
 ☒ Minor
 ☒ Major
 ☒ Cosmetic
 ☒ <Blank>

Participant

☒ All
 ☒ Clare Reviewer
 ☒ Dave Reviewer
 ☒ John Author
 ☒ Made a comment
 ☐ Participated in discussion

Date

☒ All
 ☐ Since I entered the review 29 Jun 2012 16:23
 ☐ Since:

date :

time : 00 00

Mon

Tue

Wed

Thu

Fri

Sat

Sun

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8

Action: Accept all

Enter a reconciliation comment (reason):

Accepted

Select the comment category below:

Minor

Return to default

Number of comments currently selected :11 Refresh

Ok Cancel

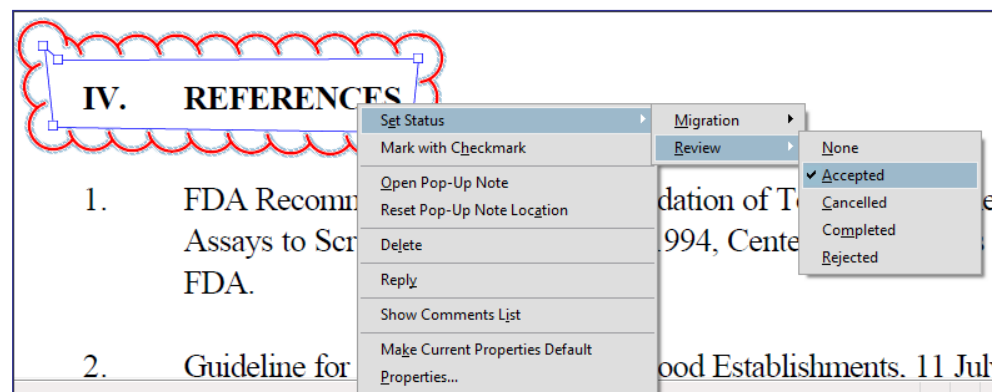
Notes:


- As the Author/Owner selects/deselects the checkboxes they can see how many comments are affected by clicking on 'Refresh' to the right of 'Number of comments currently selected' at the bottom of the window;
- If the action selected is 'Accept All' *and* (a) all of the proposed changes on a paragraph are selected (b) none of these proposed changes conflict, then they will be merged and the merge accepted;
- If the action is 'Accept All' *and* some of the proposed changes on a paragraph are selected whilst some are not, no changes will be accepted;
- If the action is 'Accept All' and all changes are selected on a paragraph but there are conflicting proposed changes, none of the changes will be accepted.




23.7 Accepting and Closing Comments using the PDF Plugin v4

Accepting and closing comments using the PDF plugin works in the same way as for Word documents in the classic interface. However, when using v4 of the plugin, the accepting and closing of comments can be done using the Acrobat 'Set Status' menu.



If the status is updated this will not be seen by other participants until the review has been synced with the PleaseReview server. The auto-refresh option (if available) will automatically sync the document to show the latest status. Alternatively, you can manually sync by clicking on the 'PleaseTech Sync' button on the Acrobat toolbar: 

Note: once the sync has completed, even though the status will show correctly in the pop-up relating to the comment or mark-up and also in the Acrobat comment pane, if you go back to the 'Set Status' menu option it is incorrectly shown as 'None'.

If you need to re-open a closed or accepted comment you will be able to do this in the PleaseReview comment window. To open the comment window, select the comment or mark-up then click on the 'Open comments window' button on the Acrobat toolbar: 



24 Closing and Completing a Review

A review Owner can close and complete a review using the 'review closeout' screen, accessed from the Review Control Panel. From the review closeout screen, the review Owner has two links available: 'Close review' and 'Complete review':

The screenshot displays the 'PleaseReview Inbox' interface. At the top, it shows the title 'review closeout - Vendor Management Procedure'. Below this, the 'review details' section contains a table with the following information:

Title	Vendor Management Procedure
Description	Review of the procedure, risk classifications and master contract.
Status	In Progress
End Date	5 May 2017 23:45
Open comments	1

Below the details, the 'actions' section provides two options:

- Close review**: Updates the review status such that reviewers can no longer comment on the document.
- Complete review**: Updates the review status such that no further updates can be made.

The bottom section, 'download documents with comments marked as tracked changes', includes a table with document information:

File name	Title	Details
Vendor Management Procedure.docx	Vendor Management Procedure.docx	Download

Additional elements include a 'Select Comments' link, a 'Download all documents' link, and a 'Back' button. Three callout boxes highlight specific features: 'Review status is 'In Progress'' points to the status field; 'Review close out options' points to the 'Close review' and 'Complete review' links; and 'Download option available only' points to the 'Download' link in the document table.

The review closeout screen also allows the review Owner to download the reviewed documents complete with aggregated comments.



24.1 Closing a Review

Closing the review will:

- Prevent Reviewers from making further comments on the review (read only);
- Allows the Owner and Author(s) to make comments and changes, and Accept and Close comments and changes.

Selecting the 'Close review' link will deliver the following action options:

<table><tr><th colspan="2">actions</th></tr><tr><td>Send reconciliation emails</td><td>Sends each reviewer an email with the status and reconciliation for all the comments and threads they participated in.</td></tr><tr><td>Complete review</td><td>Updates the review status such that no further updates can be made.</td></tr><tr><td>Re-open review</td><td>Re-opens a review so that reviewers can make more comments. Invitations and reminders will not be re-generated.</td></tr></table>		actions		Send reconciliation emails	Sends each reviewer an email with the status and reconciliation for all the comments and threads they participated in.	Complete review	Updates the review status such that no further updates can be made.	Re-open review	Re-opens a review so that reviewers can make more comments. Invitations and reminders will not be re-generated.
actions									
Send reconciliation emails	Sends each reviewer an email with the status and reconciliation for all the comments and threads they participated in.								
Complete review	Updates the review status such that no further updates can be made.								
Re-open review	Re-opens a review so that reviewers can make more comments. Invitations and reminders will not be re-generated.								
Send reconciliation emails	Sends an email to each participant advising them that the review is closed to further comment, and provides them with a link to the reconciliation report. This should be sent once the Author/Owner has completed accepting and closing comments.								
Complete review	See Completing a Review .								
Re-open review	Re-opens the review. Note; if the document(s) have been reserved, re-opening the review will not unreserve the document(s) again. See Unreserving a Document .								



24.2 Completing a Review

Completing the review will:

- Prevent any further activity on the review for everyone (read only);
- Permit uploading a new version of the document to Oracle Documents Cloud (where appropriate);
- Change the status from 'Active'. This is relevant if your organization is licensed under an 'Active' user model. In completing the review it is no longer considered 'Active'.

Selecting the 'Complete review' link will deliver the following action options:

<div><div>actions</div><table><tr><td>Send reconciliation emails</td><td>Sends each reviewer an email with the status and reconciliation for all the comments and threads they participated in.</td></tr><tr><td>Re-open review</td><td>Re-opens a review so that reviewers can make more comments. Invitations and reminders will not be re-generated.</td></tr></table></div>		Send reconciliation emails	Sends each reviewer an email with the status and reconciliation for all the comments and threads they participated in.	Re-open review	Re-opens a review so that reviewers can make more comments. Invitations and reminders will not be re-generated.
Send reconciliation emails	Sends each reviewer an email with the status and reconciliation for all the comments and threads they participated in.				
Re-open review	Re-opens a review so that reviewers can make more comments. Invitations and reminders will not be re-generated.				
Send reconciliation emails	Sends an email to each participant advising them that the review is closed to further comment, and provides them with a link to the reconciliation report. This should be sent once the Author/Owner has completed accepting and closing comments.				
Re-open review	Re-opens the review. Note; if the document(s) have been reserved, re-opening the review will not unreserve the document(s) again. See Unreserving a Document .				



24.3 Unreserving a Document

Before a review is 'complete' the only option available is 'download' the document. However, once the review is complete it may be possible (depending on configuration) to upload a new version of the document back into Oracle Documents Cloud.

The options available will be in the dropdown menu displayed next to the document:

PleaseReview Inbox

review closeout - Vendor Management Procedure

review details

Title	Vendor Management Procedure
Description	Review of the procedure, risk classifications and master contract.
Status	Completed (25 Apr 2017 14:57)
End Date	5 May 2017 23:45
Open comments	1

actions

- Send reconciliation emails**: Sends each reviewer an email with the status and reconciliation for all the comments and threads they participated in.
- Re-open review**: Re-opens a review so that reviewers can make more comments. Invitations and reminders will not be re-generated.

download documents with comments marked as tracked changes

File name	Title	Details
Vendor Management Procedure.docx	Vendor Management Procedure.docx	<div>Upload a new version</div> <div>Upload a new version</div> <div>Clear reservation</div>

Go all ☒ Continue processing documents upon error? **Go**

Download all documents

Back

Callouts:

- 'Go all' link to upload new version for multiple documents at the same time
- Review status is 'Completed'
- 'Upload a new version' now available



For Word and Excel documents, select the appropriate action from the drop down list and then click 'Go'. The selected action is performed. There are two options available:

Upload a new version	This will upload a new version of the document back into Oracle Documents Cloud and the document will then be unreserved.
Clear reservation	This will clear the reservation on the document in Oracle Documents Cloud without uploading a new version.

Notes:

- 'Upload as a new version' can only be performed once and cannot be undone. Thereafter only the 'download' option is available even if the review is re-opened;
- If you select to upload a new version of the document back into Oracle Documents Cloud, the version history against the document in Oracle Documents Cloud will display as 'updated by PleaseReview System'.

24.4 Auto-Complete of a Review

A review may be auto-completed if it has been enabled at system configuration level. Once enabled, 'auto-complete' will automatically mark overdue reviews as complete after a specified number of days after the last activity on the review (such as a comment/change, or an accept/close).

Only overdue reviews are affected by this setting and the time period of non-activity is set at system configuration level. If a review is auto-completed, the review Owner will be notified by email.

Note: If the review is auto-completed the documents will remain reserved until they have been manually unreserved by the review Owner.



25 Document Download

It is possible to download reviewed documents, complete with aggregated comments and proposed changes for Word, Excel, PDF and supported source code formats (if available), and access a report for other formats.

Participants in a review can download the original documents and documents with comments for supported formats from 'Download copy'. This can be accessed via the Review Control Panel or from the review interface.

The review Owner can also download documents with comments for supported formats or display the reconciliation report for other formats via the review closeout screen:

The screenshot shows a table titled "download documents with comments marked as tracked changes". The table has three columns: "File name", "Title", and "Details". It lists four documents: "Sample policy document.doc", "sample ls.pdf", "Intro to pleasereview (demo short).ppt", and "Folder 3 Image Docs only.zip". Each document has a "Download" or "Display" link in the "Details" column. A "Select Comments" button is located above the table. A "Download All" button is at the bottom left. Callouts explain the functionality of these elements:

- Select Comments:** Define which comments to include in the download
- Download All:** Download a zip file of all documents listed above with the
- Download/Display links:** Download document / Display report

File name	Title	Details
Sample policy document.doc	Sample policy document.doc	Download
sample ls.pdf	sample ls.pdf	Display
Intro to pleasereview (demo short).ppt	Intro to pleasereview (demo short).ppt	Display
Folder 3 Image Docs only.zip	Folder 3 Image Docs only.zip	Display

The document/report is retrieved by selecting the 'Download' or 'Display' link. Selecting the 'Download All' option (only available from the review closeout) will download a zip file containing all documents available in PleaseReview which have the download option.

25.1 Default Document Download with Comments

The default position is the downloaded document or displayed report does not contain closed comments, but does include all open and accepted comments from all participants.



25.2 Defining Comments in the Document Download

It is possible to define which comments appear in the document download using the 'Select Comments' link. This opens the comment selector window:

Select comments by:

Status	<input type="checkbox"/> All <input type="checkbox"/> Closed <input checked="" type="checkbox"/> Accepted <input checked="" type="checkbox"/> Open																																																	
Type of comment	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> General <input checked="" type="checkbox"/> Comment <input checked="" type="checkbox"/> Proposed Change																																																	
Comment category	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Minor <input checked="" type="checkbox"/> Typo <input checked="" type="checkbox"/> Major <input checked="" type="checkbox"/> Cosmetic <input checked="" type="checkbox"/> <Blank>																																																	
Participant	<div><input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Adam Demo <input checked="" type="checkbox"/> Ben Demo <input checked="" type="checkbox"/> Caleb Demo <input checked="" type="checkbox"/> Daniel Demo <input checked="" type="checkbox"/> Ephraim Demo <input checked="" type="checkbox"/> Frank Demo <input checked="" type="checkbox"/> Gideon Demo</div> <div><input checked="" type="radio"/> Made a comment <input type="radio"/> Participated in discussion</div>																																																	
Date	<div><input checked="" type="radio"/> All <input type="radio"/> Since I entered the review 6 Jun 2016 15:56 <input type="radio"/> Since: date : time : 00 00</div> <div><div>< June 2016 ></div><table><tr><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th><th>Sun</th></tr><tr><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr><tr><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td></tr><tr><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr><tr><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td></tr><tr><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td><td>3</td></tr><tr><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td></tr></table></div>	Mon	Tue	Wed	Thu	Fri	Sat	Sun	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10
Mon	Tue	Wed	Thu	Fri	Sat	Sun																																												
30	31	1	2	3	4	5																																												
6	7	8	9	10	11	12																																												
13	14	15	16	17	18	19																																												
20	21	22	23	24	25	26																																												
27	28	29	30	1	2	3																																												
4	5	6	7	8	9	10																																												

The default download includes all open and accepted comments from all participants. It does not include closed comments



25.3 Word Document 'Round-Tripping'

For Microsoft Word documents, there are additional options which define how comments and proposed changes are included in the download.

These options are applied to the comments which are selected for inclusion in the Word document using the 'Select Comments' link as described in [Defining Comments in the Document Download](#).

There are two high level options: 'Tracked Changes' or 'Comments only':

Selections specific to Microsoft Word documents:

☒ **Tracked Changes**

- ☒ Open as tracked; accepted as normal text (default)
- ☐ Accepted as tracked; open as comments
- ☐ Include a Word comment whenever changing the document
- ☐ Produce a clean set of comments (no replies or status information)
 - ☐ Comment author: initials
 - ☐ Comment date
 - date :
 - time :

☐ **Comments only**

☐ Include Paragraph IDs

☐ Clean download - removes Word "metadata" and previous tracked changes

☐ Debugging options

Calendar: August 2016

Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

'Tracked Changes' options

'Comments only' option



Selecting the 'Comments only' radio button means that all comments and proposed changes will be included in the Word document as Word comments only.

Selecting the 'Tracked Changes' radio button opens up two further options which control how comments and proposed changes are displayed in the document download:

<div><input checked="" type="radio"/> Tracked Changes<div><input checked="" type="radio"/> Open as tracked; accepted as normal text (default)<input type="radio"/> Accepted as tracked; open as comments</div></div>		
Comment/Proposed Change Type	Open as tracked (default)	Accepted as tracked
Accepted or Open Comments	Inserted as Word comments	Inserted as Word comments
Accepted Proposed Changes	Replaces old wording	Inserted as tracked changes
Open Proposed Changes	Inserted as tracked changes	Inserted as Word comments
Closed Comments, Proposed Changes	Inserted as Word comments	Inserted as Word comments
	(Note: In the default comment selection, closed comments are not included in the download).	

There are other checkbox options which apply to both the above.



<div><input type="checkbox"/> Include a Word comment whenever changing the document <input type="checkbox"/> Produce a clean set of comments (no replies or status information) <input type="checkbox"/> Comment author: <input type="text"/> initials <input type="text"/></div>	
Checkbox item	Effect
Include a Word comment whenever changing the document	In addition to inserting the text into the Word document, the entire proposed change is included as a Word comment. This allows you to see the previous paragraph/word text for comparison.
Produce a clean set of comments (no replies or status information)	Allows you to generalize and set-up the 'author' and date/time of the tracked changes as seen by Word. So, for example, if multiple people have contributed to the document and you want all comments, tracked changes, etc. to appear to have come from a single source (for example your company name), this option will allow you to set the name and initial used by Word as the author of the comments and tracked changes. Likewise, the date and time setting will determine the apparent date and time of the comments and tracked changes.



<div> <input type="checkbox"/> Include Paragraph IDs <input type="checkbox"/> Clean download - removes Word "metadata" and previous tracked changes <input type="checkbox"/> Debugging options </div>	
Checkbox item	Effect
Include Paragraph IDs	Selecting this option means that the Word document will be downloaded with each paragraph number inserted in blue in square brackets.
Clean download – removes Word metadata and previous tracked changes	<p>Word metadata is defined as all information contained in the Word document which is not document text itself. Selecting this option will:</p> <ul style="list-style-type: none"> • Remove all standard document properties; • Remove all custom document attributes; • Remove all previous tracked changes (which may have been in the document prior to upload into PleaseReview) by 'accepting' all previously proposed tracked changes. This has the effect of keeping inserted text and removing deleted text; • Remove all previous Word comments (which may have been in the document prior to upload into PleaseReview); • Remove all text formatted as hidden. <p>All tracked changes and comments inserted by PleaseReview as part of the document download are not affected. Note: If this option is selected, it will overwrite any information you have entered in the 'Produce a clean set of comments (no replies or status information)' option.</p>
Debugging options	This option should only be used under the supervision of support.

Notes:

- It is possible to download the Word document until the review is deleted;
- Round-tripped paragraphs in the Word document which have accepted or open proposed changes will retain any formatting, field codes, footnotes, endnotes, images, etc. The only Word structures not retained are Word drawing objects, i.e. those generally found on the 'Drawing' toolbar in Word. PleaseReview will automatically recognize paragraphs containing such objects and convert the proposed change into a Word comment to preserve these items. The review Owner will then need to manually edit the paragraph.



25.4 Excel Document 'Round-Tripping'

By default, comments and proposed changes in the downloaded Excel document will be rendered as follows:

Comment/Proposed Change Type	Action
Accepted or Open Comments	Inserted as Excel comments
Accepted Proposed Changes	Replaces old cell text Note: If the uploaded spreadsheet is 2003 (xls) format, accepted proposed changes to formula cells are shown in the downloaded document as comments.
Open Proposed Changes	Inserted as Excel comments
Closed Comments, Proposed Changes	Not included in the document by default. If included, will be inserted as Excel comments.

25.5 PDF Document Download in V6.1

This section relates to PDF's reviewed in the V6.1 interface. If you are configured to use the PleaseReview classic interface, please refer to [PDF Document Download/Display \(Classic Interface\)](#).

Selecting 'Download' for a PDF file will open the PDF document with all proposed changes converted to adobe annotations. There are additional options for PDF documents which define how comments and proposed changes are included in the download, and how redactions are displayed. These options are available within the comments selector window which includes a section entitled 'Selections specific to PDF documents'.

Notes:

- Your local settings will determine what software the PDF is opened in, however you should ensure your local settings are configured to open PDF's in an appropriate PDF viewer, as opening PDF's in a browser will not display comments and annotations;
- In the event of a mixed document type review which also contains Word documents, the PDF section will be below the equivalent Word section.

Checkbox item	Effect
Produce a clean set of comments (no replies or status information)	<p>Removes replies and comment status information.</p> <p>Further options allow the specification of the comment author and the date/time of the comments as they will appear in the PDF document.</p> <p>For example, if multiple people have contributed to the document and you want all comments, to appear to have come from a single source (i.e. your company name).</p>
Export redactions as PDF redaction marks (redacted content still visible)	<p>Allows you to download redactions as 'marked for redaction', rather than the default which applies the redactions to the downloaded PDF.</p> <p>By default, open and accepted redactions will be applied to the downloaded PDF, and you will not be able to see the underlying content of the redaction. Selecting this option will mean that the underlying content will be visible in the downloaded PDF. See PDF Redaction Marks.</p>



25.5.1 PDF Redaction Marks

When using the 'Export redactions as PDF redaction marks', any open or accepted redactions with the comment category of 'EU70-PPD' or 'EU70-CCI' will appear in the document download in accordance with the EU Policy 70 requirements for redaction:

Redaction with comment category 'EU70-PPD'	Redaction with comment category 'EU70-CCI'
 A redaction mark for 'EU70-PPD' is shown. It consists of a blue rectangular box with the text 'PPD' in white. To the right of the box, the text 'After an asses' is visible. Below the box, the text 'fall quickly in place because it will be much easier for' is visible.	 A redaction mark for 'EU70-CCI' is shown. It consists of a black rectangular box with the text 'CCI' in red. To the right of the box, the text 'After an asses' is visible. Below the box, the text 'fall quickly in place because it will be much easier for' is visible.

Notes:

- When using the Export redactions as PDF redaction marks, the redactions are unapplied and any content underneath is still visible, until the redactions are applied within Adobe Acrobat;
- Any redactions where the comment category is blank or does not match a comment category in the template file will appear using the default setting;
- If the PDF document is downloaded without selecting the 'Export redactions as PDF redaction marks' option, all redactions, regardless of comment category, will be applied redactions using the default redaction style;
- Any other custom categories set by your System Administrator will appear with the properties specified for the custom category.



25.6 PDF Document Download/Display (Classic Interface)

This section relates to PDF's reviewed in the PleaseReview classic interface. If you are configured use the PleaseReview V6.1 interface please refer to [PDF Document Download in V6.1](#).

When reviewing PDF's in the PleaseReview classic interface, you will note that PDF differs from other formats with respect to the download and close-out options.

Your PDF preference within your personal user settings will dictate the PDF download and close-out options available:

PDF User Setting	PDF Download Options
Use Acrobat Plugin	'Download' link available. You will receive a PDF document.
Review as Image	'Display' link available. You will receive a report, not a PDF document.

Note: regardless of your PleaseReview settings the PDF document download functionality is only available if you have a copy of Acrobat Standard or Professional and the PleaseReview PDF plugin installed.

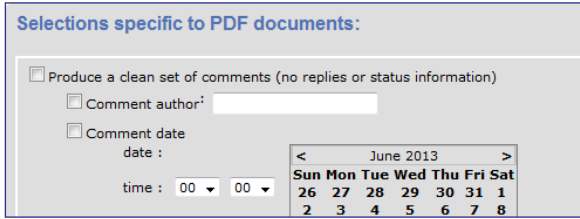


25.6.1 PDF Document Download (Classic Interface)

Selecting 'Download' for a PDF file from the review closeout screen will open the PDF document in a new window and automatically display the 'Save a copy ...' dialog box.

In order to place the PDF file into close-out mode, you must save a copy of the file to a known location on the file system. If you simply cancel this dialog you will receive a warning to close the window and open the saved file in Acrobat. Note: You must save the file in close-out mode or not all comments will be correctly saved and displayed in the PDF file. Once the PDF file is saved in close-out mode, you can open it in your copy of Acrobat (not the browser).

If the review contains a PDF document, the comments selector window will include a section entitled 'Selections specific to PDF documents'. The default setting is for native PDF-style comments. In the event of a mixed document type review which also contains Word documents, this section will be below the equivalent Word section.

	
Checkbox item	Effect
Produce a clean set of comments (no replies or status information)	Removes replies and comment status information. Further options allow the specification of the comment author and the date/time of the comments as they will appear in the PDF document. For example, if multiple people have contributed to the document and you want all comments, to appear to have come from a single source (i.e. your company name).



25.6.2 PDF Document Report Display (Classic Interface)

The PDF comment report displayed will be substantially the same as the reconciliation report and will contain scaled down copies of the pages which contain comments, with the location of each comment identified and numbered.

The comment listing contains all comments, the numbers of which refer back to the numbers on the image of the PDF page.

The screenshot displays a web interface for reviewing PDF documents. At the top, there's a header with 'Page 1' and 'Page 1 of 1'. Below this, a scaled copy of a PDF page is shown as an image. Two callout boxes point to specific features: one points to the scaled PDF page with the text 'Scaled copy of the PDF page shown as an image with comment locations identified and numbered', and another points to a table below with the text 'Comment listing following standard report format'.

Posn	Text	T	Comment	S	Author comment
[1]		C	Comment (3) by Demo Reviewer 1 on 26 May 2009 12:24 Category / Minor Demo Reviewer 1 (26 May 2009 12:24) This is my comment here		
[2]		P	Proposed Change (1) by Demo Reviewer 2 on 26 May 2009 12:21 Category / Minor The Beatles have lost their own-shaling <u>this is a change</u> against Apple Computer over its iPod and iTunes download service. Demo Reviewer 2 (26 May 2009 12:21)		



25.7 Plain Text Document Download

For plain text documents, accepted proposed changes simply replace the existing text.

All other comments and proposed changes (i.e. open and accepted comments, open proposed changes and anything closed – if selected) are inserted into the document with a preceding '---TODO:':

```
----TODO: PleaseReview: Comment on line 1 by Demo User 2 (19 May 2016 10:42) Accepted 19
May 2016 11:25: Accepted: my acceptance reason
----      a comment here

This document is designed as a reference source for users of PleaseReview.

----TODO: PleaseReview: Comment on line 3 by Demo User 1 (19 May 2016 10:40) Accepted 19
May 2016 11:26: Accepted: my other acceptance reason
----      This is demo1's comment

----TODO: PleaseReview: Comment on line 3 by Demo User 2 (19 May 2016 10:41)
----      Demo2's comment on line 3
```



25.8 Source Code File Download

Source code files are fully 'round tripped' and thus accepted proposed changes are incorporated directly into the file. Open (or closed, if selected) changes and all comments are entered into the code as TODO comments:

```
package com.pleasetech.tara.webtop;

//TODO: PleaseReview: Comment on line 3 by Demo Reviewer 1 (3 Jun 2017)
//      This is a comment on line 3

import com.documentum.web.common.ArgumentList;
import com.documentum.web.common.LocaleService;
import com.documentum.web.form.control.*;
import com.documentum.web.form.control.databound.DataBound;
import com.a_edms.web.form.control.databound.DataBound;
import com.documentum.web.form.control.*;
import com.documentum.web.form.control.*;
import com.documentum.web.form.Control;
//TODO: PleaseReview: Proposed Change on line 11 by Demo Reviewer 1 (3 Jun 2017)
//import com.a_change.web.util.DateUtil;

import com.documentum.web.util.DateUtil;
import com.documentum.fc.common.DfLog;
import com.pleasetech.tara.taraws.*;
import com.pleasetech.tara.support.St;
import com.pleasetech.tara.support.St;
import com.pleasetech.tara.support.Rev
```

PleaseReview comment creates 'TODO' comment

Accepted proposed change updates code

Open proposed change creates 'TODO' comment

25.9 Other Document Formats

For other document formats the Owner has access to an HTML report of the comments. This is the same as the reconciliation report but is document-specific. This enables the Owner to view the comments in a single report and can be used as a reference for updating the source document or sending comments to third parties, etc.

Chapter Eight

Co-Authoring

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26 Introduction to EditZones

EditZones are areas of a Word document which the review Owner can setup to assign different Contributor permissions to different users. Contributors are then able to edit the allocated area of the Word document using Microsoft Word itself and upload it back into the review.

This provides a very powerful capability that allows different parts of the Word document ('EditZones') to be authored in parallel, and then for each part to be released for review once it is available. So Contributors responsible for each EditZone can edit the EditZone, make it available for review, and then re-edit the EditZone to incorporate changes and, again, make it available for review. This allows different parts of the document to be finalized at different times and in parallel.

EditZones are applicable to Word documents only.

PleaseReview has an optional Microsoft Word plugin which may be used in conjunction with EditZones to create a seamless editing experience. However, there is a 'zero foot print' option and the Word plugin is not mandatory. This section covers use of EditZones both with and without the Word plugin.

26.1 Contributor Roles

To enable EditZones in a review, at least one participant must be assigned a role containing 'Contributor'. See [Contributor Roles](#).



27 Creating and Managing EditZones

Review Owners are able to create and manage EditZones in a review.

27.1 Creating EditZones

EditZones are enabled by the review Owner at step 3 of the new review wizard by assigning permission(s) containing 'Contributor'. At step 5 of the new review wizard, EditZones can be set by selecting the 'Preview/EditZones' option, or they can be set after the review has started.

new review step 5: verify details and start review or put it on hold

participants [Edit](#)

Name	Email	Role
Adam Demo	adam.demo@pleasotech.com	Owner-Contributor
	ben.demo@pleasotech.com	Contributor
	daniel.demo@pleasotech.com	Contributor
	ephraim.demo@pleasotech.com	Contributor

Contributor roles must be assigned

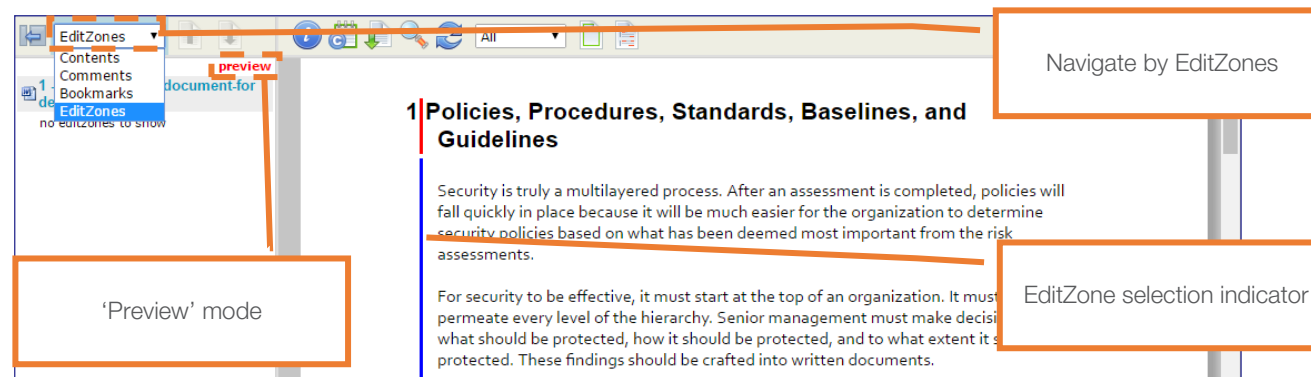
documents [Edit](#)

File name	Title	Preparation	
1 - Sample policy document-for demo.docx	1 - Sample policy document-for demo.docx	Successful	Preview/EditZones

Link to set EditZones



After clicking the 'Preview/EditZones' link, the document for review will open in 'Preview' mode:



To set the first EditZone, click the paragraph where you would like the EditZone to start. Your selected paragraph will display a red line to the left which indicates the start of the EditZone.

You may select as little as a single paragraph or as much as the whole document to be an EditZone. PleaseReview may select associated paragraphs (if, for example, you start the EditZone at a heading level) to be included in the zone (see [Automatic Selection Rules for EditZones](#)). The selected paragraphs to be included in the EditZone will be indicated by a blue line to the left of the paragraph.



The comment window will open with the 'Zones' tab automatically selected. At this point, you can set the end range of the EditZone and assign the EditZone to one or more Contributors:

zones on 1 - Sample policy document-for demo.docx Paragraph Id 1 refresh

Bookmarks Zones

Type EditZones

paragraph range: 1 to: 11 [Edit]
click "Edit" to set the end paragraph.

Title
1 Policies, Procedures, Standards, Baselines, Optional description

Contributor

Name	Email	Selected
Adam Demo	adam.demo@pleasotech.com	<input type="checkbox"/>
Ben Demo	ben.demo@pleasotech.com	<input checked="" type="checkbox"/>
Daniel Demo	daniel.demo@pleasotech.com	<input type="checkbox"/>
Ephraim Demo	ephraim.demo@pleasotech.com	<input type="checkbox"/>

Apply Cancel

Ensure 'EditZones' selected

EditZone range selected (click 'Edit' to change)

Default title (prepopulated from document content)

Check box to assign EditZone to Contributors

Notes:

- The EditZone title is pre-populated from the document's contents. It may be over-typed;
- The description is optional;
- All review participants with a role of Contributor will be listed. One or more Contributors may be assigned to each EditZone;
- EditZones may not overlap and must be on discrete parts of the document;
- You cannot include a paragraph without also including its footnotes and textboxes;
- You cannot select part of a table. The entire table will be automatically selected;
- You cannot have the start or end point of an EditZone inside a header or footer, unless they are both inside the same header/footer;
- To change the end range of the EditZone, click the '[Edit]' link and then click on the paragraph in the document where you would like the EditZone to end.



27.1.1 EditZone Shading

Once created, the EditZones will be visible by background shading of the text. Once the review has started the default shading also denotes the EditZone status:

Green	EditZone allocated to you and available for download.
Gray	Assigned to another Contributor who has not started - zone is available for review.
Red	EditZone is in progress - zone is not available for review.

27.1.2 Creating EditZones after a Review has Started

If creating an EditZone after a review has started, the process is the same as when creating EditZones in preview mode. However, the comment window will open with the 'EditZones' tab selected only if you are navigating by EditZones.

27.1.3 Assigning EditZones as a Super-Contributor

At the Zones tab in the comment window the Super-Contributor is able to assign EditZones to themselves but they will not be able to assign EditZones to anyone else. All other rules pertaining to assigning EditZones from the comment window are the same as for the review Owner. See [Creating EditZones](#) for more information.

27.1.4 Automatic Selection Rules for EditZones (and ReviewZones)

When creating EditZones, PleaseReview will use an automatic 'smart selection' of content based on where the EditZone starts.

If the start paragraph is a Word heading level, all paragraphs to the next same level heading will be automatically selected. So, for example, if you select a level 1 heading, the selection will automatically include everything to the next level 1 heading.

You can override the automatic selection by clicking the '[Edit]' link and then click on the paragraph in the document where you would like the EditZone to end.



27.2 Managing EditZones

The review Owner has full control over EditZones. They can add, edit or delete EditZones and can also reset and complete EditZones assigned to other Contributors.

The review Owner can edit or delete existing EditZones using the 'Zones' tab of the comment window:

zones on 1 - Sample policy document-for demo.docx Paragraph Id 1
refresh

Bookmarks Zones

Type EditZones ▼

Title	1 Policies, Procedures, Standards, Baselines,
Paragraph range	1 to: 11
Description	
Assigned to	Ben Demo
Status	Not started

Delete Edit

Use the 'Delete' and 'Edit' buttons to manage EditZones

To remove an EditZone, simply click 'Delete'.

To change the range of an EditZone, or assign to a different Contributor, click 'Edit'. The comment window will update to enable editing and all options available when setting EditZones will be available (see [Creating EditZones](#)).

The review Owner can also reset and complete EditZones assigned to other Contributors. The options available depend on the Contributor's status in respect of the EditZone. For example, once a Contributor has published an EditZone, the review Owner has the option to 'Complete' the EditZone or 'Undo-Publish'. See [EditZone Upload Actions](#) for more information.

A full history of EditZone activity is available on the Review Control Panel. This link opens the 'EditZone History' screen which lists each EditZone activity and allows you to view the document and the reconciliation report as it existed prior to each EditZone activity (see [Document History](#)).



27.2.1 Resetting an EditZone

If a Contributor has downloaded an EditZone but has not uploaded it with a status of either 'Revise' or 'Publish', it is possible for the review Owner to reset the EditZone using the 'Reset' button on the Zones tab of the comment window:

zones on Sample policy document.docx Paragraph Id 16
refresh

Zones

Type EditZones ▼

Title	Online meeting technology differs from PleaseRevie
Paragraph range	16 to: 57
Description	
Assigned to	Gideon Demo
Status	In progress

Reset

Resetting the EditZone will revert back to the position before the download. Thus it will make the EditZone available for review and any 'saves' the Contributor has made in the meantime will be lost.

27.2.2 EditZones and Delegation

If a review participant uses [Simple Delegation](#) to delegate their role on a review to another user, they delegate all their permissions. This means that any EditZones assigned to the original participant that have not been completed will be reassigned to the new participant. This applies even if the original participant had downloaded the EditZone before delegating.

If a review participant uses [Managerial Delegation](#) to add new participants to a review they only delegate Reviewer permissions. In this instance the Delegator remains on the review and retains any existing EditZone permissions.



28 Using EditZones

From a Reviewer's perspective, an EditZone is either available for review or it is locked for editing (in which case it cannot be reviewed).

EditZones are identified by background shading of the text. The default shading also denotes the EditZone status:

Green	EditZone allocated to you and available for download.
Gray	Assigned to another Contributor who has not started - zone is available for review.
Red	EditZone is in progress - zone is not available for review.

Note: EditZone colors are system configurable and the shading can even be removed completely. This document uses the default colors.



Clicking on a paragraph and selecting the 'Zones' tab of the comment window will provide more information, including the title of the EditZone (with any optional description), the Contributor to which it is allocated and the current status. It may also provide the EditZone history (if any). If ReviewZones are enabled within the review then you need to ensure you have the correct Zone Type selected on the 'Zones' tab.

Ensure 'EditZones' selected

Who the EditZone has been assigned to

Current EditZone status

EditZones history (if any)

zones on Sample policy document.docx Paragraph Id 12.1.1 [refresh](#)

[Comments](#) [Bookmarks](#) **[Zones](#)** [Notify](#)

Type

Title	2 PleaseReview vs Online meeting technology su
Paragraph range	12.1 to: 12.27
Description	
Assigned to	Caleb Demo
Status	Available for review

Navigate by: << editzones >>

editzone history

Ver 5	Publish	Caleb Demo	6 Jul 2016 12:34
Ver 4	Revise	Caleb Demo	15 Jun 2016 16:00
Ver 3	Publish	Caleb Demo	6 Jun 2016 12:15
Ver 2	Revise	Caleb Demo	1 Jun 2016 16:11
Ver 1	Publish	Caleb Demo	31 May 2016 9:56

EditZones will also be shown in the navigation pane when the 'EditZones' option is selected in the drop-down box. Brief summary information about the EditZone is also given.



28.1 Adding Comments and Bookmarks to an EditZone

If you have made comments and/or proposed changes, or added a bookmark to a paragraph which is in an EditZone, the comments, changes and bookmarks will be 'lost' once the Contributor has revised the EditZone.

The comments and proposed changes will have been available to the Contributor at the point of downloading the EditZone but they will not appear in the updated EditZone.

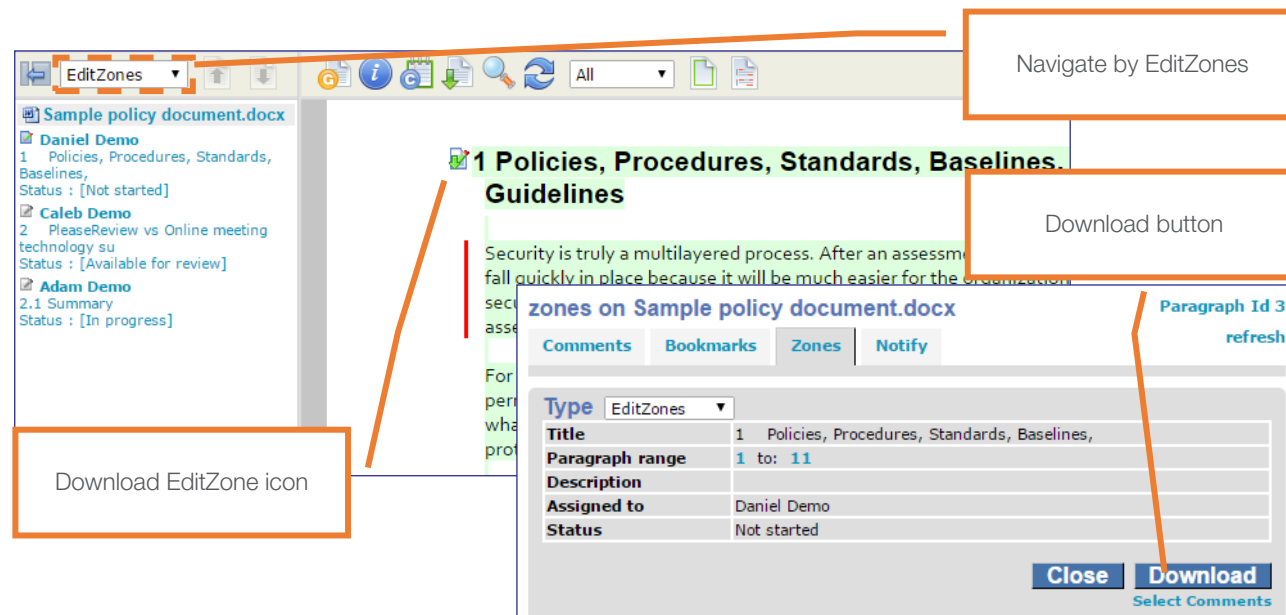
All comments and proposed changes will be available in the 'EditZone History' screen which is accessed from the Review Control Panel (see [Document History](#)) but the bookmarks will simply be lost.



28.2 Downloading an EditZone

As a Contributor you can only download an EditZone if it is allocated to you. If multiple Contributors have been assigned to the same EditZone only one Contributor can download it at a time.

Green shading indicates an EditZone is allocated to you and available for download. There are two options to download the EditZone - using the 'Download EditZone' icon or the 'Download' button in the comment window:



Downloading an EditZone will download the section of the document set as the EditZone in Microsoft Word.

Whether you choose to open the document directly or save it to a known location, the EditZone will be downloaded complete with any comments and proposed changes ('Open' and 'Accepted').



The 'Select Comments' link below the Download button allows you to select which Reviewer's comments are included in the download and how they behave. The behavior of this functionality is identical to the review Owner's download option via the review close-out dialog, see [Document Download](#).

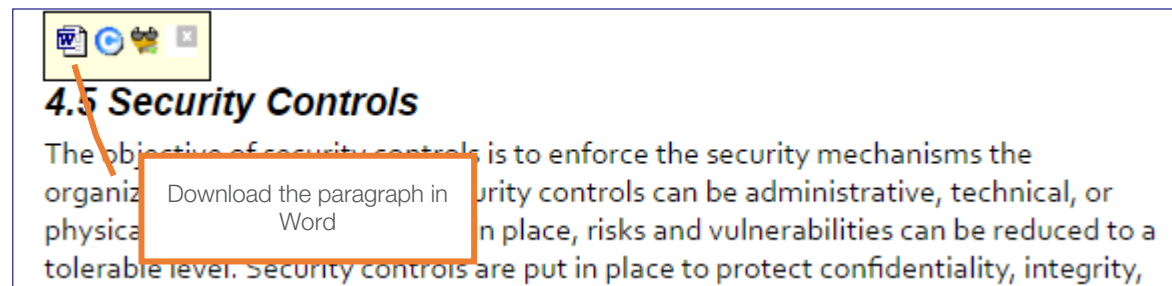
28.2.1 Cancelling a Download

To cancel a download, open the comment window, go to the 'Zones' tab and select 'Reset'. This will cancel the download and return the EditZone to the previously published revision.

28.2.2 Downloading an EditZone as a Super-Contributor

If the Super-Contributor has their 'Inline editing and paragraph toolbar' preferences set to 'Use Inline Editing' or 'Toolbar Only', they will be able to open any paragraph directly in Word for editing. This functionality is designed to be used with the PleaseReview Word plugin, making it quick and easy for a Super-Contributor to open a paragraph in Word, edit it and then 'save and complete' from within Word to update the document being reviewed. All such actions are audited.

The paragraph toolbar has an icon for opening the paragraph directly in Word:



Once downloaded, the paragraph will be 'locked' to other participants, just as for normal EditZones, until the Super-Contributor uploads it again.



28.3 Working with a Downloaded EditZone

Once a Contributor has downloaded an EditZone, the document can be edited in Microsoft Word using all of the Word tools. There are, however, some rules and limitations which must be noted:

- You will not be able to include links or insert cross references to parts of the document that are not in your EditZone;
- If your Word document has an OLE Embedded Object (such as a spreadsheet), the object will be available in the downloaded EditZone. However, any changes to the embedded object will not be saved back when the edited Word document is uploaded to update the EditZone;
- It is possible to insert Word Heading levels. However, if you add a new heading level which is equal to or higher than the highest level in your EditZone, there will be an impact on the master document;
- Depending on various factors, your Word document may or may not include headers and footers. If you edit headers and footers, this may affect them in other parts of the document. See [Headers, Footers and Section Breaks](#) for more information;
- There are certain limitations with bulleted listings and numbering. See [Bulleted and Numbered Lists](#) for more information;
- There are certain limitations with bibliographies when a review contains EditZones. See [Citations and Bibliographies](#).



28.3.1 Headers, Footers and Section Breaks

The result of the way Word handles headers, footers and section breaks means that a Contributor may or may not see headers and footers in the downloaded EditZone, depending on how the master Word document is constructed.

Scenario	Result
Case 1 The EditZone does not contain any section breaks	In this case, there will be no headers or footers defined in the EditZone. However, the Contributor may add a section break(s) to the document, and can define headers and footers on those section breaks. On upload, PleaseReview will leave any section breaks added by the Contributor, but will delete any headers and footers included in them, so the headers and footers that appear in the document will not be affected.
Case 2 The EditZone contains section breaks but no header and footer definitions	In this case all the section breaks inside the EditZone document have all their headers and footers defined as 'same as previous'. When the EditZone is downloaded it will have no headers and footers (because they are all 'same as previous', even the first one). The Contributor can add or delete section breaks, or change existing section breaks from 'same as previous' to having headers and footers defined. When the EditZone is uploaded, PleaseReview will process this exactly the same as in Case 1, i.e. the new section breaks are all preserved, but any headers and footers, or edits, added by the Contributor will be lost.
Case 3 The EditZone contains one or more section breaks which have headers and footers defined	In this case, PleaseReview must allow the Contributor to edit the section breaks that have been downloaded. When the EditZone is uploaded, PleaseReview will copy in all the section breaks from the EditZone into the merged master document, including their header and footer definitions. Note: this is because it is not possible to work out which headers/footers are part of the original EditZone, and which ones have been added/edited by the Contributor. Implications: <ul style="list-style-type: none"> • This does not mean that the Contributor will see all of the correct headers and footers in the document – if some of them are 'same as previous' and the previous is defined outside the EditZone, the Contributor will just see them as blank; • It also means a Contributor can potentially edit the headers and footers for parts of the document that are outside their EditZone (even for the whole document).



28.3.2 Bulleted and Numbered Lists

Bulleted and numbered lists have a number of limitations due to the way in which they are handled by Word:

- If a Contributor adds a new list item (i.e. bullet or number) to an existing list, it will display correctly in both the revised EditZone in the review, and in the downloaded master document;
- If a Contributor changes a list from one form to another (i.e. from a bulleted list to a numbered list), it will display correctly in the revised EditZone in the review, but in the downloaded master document it will have reverted to its original state;
- If a Contributor adds a new list (i.e. not attached to an existing list) then the behavior will be as follows:
 - if there is a previous bullet list before it, it will show as a bullet list in both the revised EditZone in the review and in the downloaded master document;
 - if there is no list before it, it may be turned into a numbered list in the downloaded document.
- If a Contributor adds a new numbered list (i.e. not attached to an existing list), it may be turned into a bullet list, reflect the settings of a previous numbered list, or have the number continued from a previous numbered list.



28.3.3 Citations and Bibliographies

If EditZones are applied to a Word document containing citations and bibliographies, a Contributor can download the EditZone and edit the document in Word in the usual way. This includes any Word plugins/add-ins installed on the Contributors Microsoft Word application to add new citations and references. There are, however, certain limitations which Contributors should be aware of as detailed below.

Notes:

- If new citations are added in the downloaded EditZone, the citation software may or may not insert an automatic bibliography (this feature varies depending on the citation software used);
- If new citations are added in the downloaded EditZone, they will appear as citations in the master document when the EditZone is uploaded back into PleaseReview and the final document download will retain any existing and newly inserted citations;
- If the new citations are added in the downloaded EditZone without a bibliography, and the master document contains a bibliography, the bibliography will not be updated;
- If the new citations are added in the downloaded EditZone with a bibliography, the new bibliography will appear at the end of the EditZone. Furthermore, if the master document contains a bibliography, it will not be updated. The implication of this is that the final document download will contain more than one bibliography – the original at the end of the document, and the newly inserted bibliographies which will appear at the end of each EditZone. In this case, the newly inserted bibliographies will need to be manually merged with the original bibliography;
- If the downloaded EditZone includes the original bibliography, the bibliography will convert to 'normal' text – it will lose its field properties and will not display as a field (with gray shading). When the EditZone is uploaded back into PleaseReview, the bibliography entries will display and behave as normal text, and the final document download will retain any existing and newly inserted citations, but the original bibliography will be lost and replaced with the entries displaying in normal text.



28.4 Uploading an Updated EditZone

Once all the necessary revisions have been made to the Word document, it can be uploaded back into the review. There are two options to upload the EditZone - using the 'Zones' tab of the PleaseReview comment window or via the PleaseReview Word plugin.

The 'Zones' tab of the comment window will update once the EditZone has been downloaded.

A 'contributor upload' area appears in the comment window.

This upload area allows you to select the revised Word document and upload it into the review. The drop-down box allows the selection of the EditZone action (see [EditZone Upload Actions](#)).

If you have the Word plugin installed, there will be a PleaseReview Upload option in Microsoft Word. Once you have edited the document you can upload it using the plugin:



28.4.1 EditZone Upload Actions

When uploading an EditZone back into the review using either the 'contributor upload' area of the comment window or the Word plugin, you will have four upload actions available:

Save	<p>Saves the file to the server but does not update the EditZone in PleaseReview. Other participants will not see the updated text. After this action, you will have the option to:</p> <ul style="list-style-type: none"> • Delete (deletes the revision); • Download (downloads the saved revision for further editing); • Revise; • Publish.
Revise	<p>Saves the file to the server and updates the EditZone in PleaseReview. Other participants will see the updated text but will not be able to make comments or proposed changes. After this action, you will have the option to:</p> <ul style="list-style-type: none"> • Publish.
Publish	<p>Saves the file to the server and updates the EditZone in PleaseReview. Other participants will see the updated text and can make comments and proposed changes. The EditZone will still be available to download and edit again. After this action, you will have the option to:</p> <ul style="list-style-type: none"> • Undo-Publish (returns the EditZone to the 'Revise' status); • Complete.
Complete	<p>Saves the file to the server and updates the EditZone in PleaseReview. Other participants will see the updated text and can make comments and proposed changes. The EditZone will be removed and will no longer be available to download for editing again.</p>



28.4.2 Notes when Uploading with the PleaseReview Word Plugin

If you have the PleaseReview Word plugin installed, there are some items you should be aware of:

- You must upload the original downloaded Word document using the Word plugin. It will not work with a different document;
- Copying and pasting template information into the downloaded document is supported. You can also save it to disk, re-open it, and then upload it using the plugin;
- The visual appearance of the plugin and how the upload options are presented to you will depend of the version of Office being used. In all cases, the options remain the same;
- If the upload is 'Save' or 'Revise', the document will remain open in Word for further work. If the upload is 'Publish' or 'Complete', the document will be closed;
- If there are any Word comments or tracked changes/moves in the document (whether they are originally from PleaseReview or not), a warning will appear that they will not be handled properly in PleaseReview. See [Uploading a Document with Existing Comments/Track Changes](#) for more information.



28.5 Document History

A full history of EditZone activity is available on the Review Control Panel. This link opens the 'EditZone History' screen which lists each EditZone activity and allows you to view the document and the reconciliation report as it existed after each EditZone activity.

Editzone History - EditZones

Select which comments to appear in the download

Date	Editzone	Contributor	Event	Updated By	
31 May 2016 9:56	2 PleaseReview vs Online meeting technology su	Caleb Demo	Publish version 1	Caleb Demo	
1 Jun 2016 16:11	2 PleaseReview vs Online meeting technology su		version	Caleb Demo	view doc view report
6 Jun 2016 12:15	2 PleaseReview vs Online meeting technology su		version	Caleb Demo	view doc view report
15 Jun 2016 16:00	2 PleaseReview vs Online meeting technology su		version	Caleb Demo	view doc view report
6 Jul 2016 12:34	2 PleaseReview vs Online meeting technology su		version	Caleb Demo	view doc view report
29 Jul 2016 15:29	2 PleaseReview vs Online meeting technology su		version	Caleb Demo	view doc view report
27 May 2016 17:36	2 PleaseReview vs Online meeting technology su	Multiple contributors	Publish version 1	Caleb Demo	view doc view report
27 May 2016 17:38	2 PleaseReview vs Online meeting technology su	Caleb Demo	Complete version 2	Caleb Demo	view doc view report
27 May 2016 13:46		Adam Demo	Original Document		view doc view report

View the entire document after the EditZone activity

View the reconciliation report after the EditZone activity

[Select Comments](#) [Refresh](#)

[Back](#)

Comments and changes are included in the download using the default settings. Therefore, by default, all open and accepted comments and proposed changes are included in the download. Accepted proposed changes will be shown in the downloaded document as inserted text, whilst open proposed changes will be shown as standard Word 'tracked changes'. PleaseReview comments are always included as standard Word comments.



The 'Select Comments' option allows you to specify which comments and changes are included in the download.

If there are multiple Contributors on an EditZone it is possible for one Contributor to 'Publish' the EditZone and another to 'Complete it'. The 'Updated By' column records who took the final action on the listed activity.

Note, when an EditZone is edited, all comments and proposed changes made on the EditZone are 'lost' and will not be carried forward when the revised EditZone is published. The only way to ascertain the comments and proposed changes which existed on the EditZone prior to its download and revision is via the EditZone history report.



29 Offline Client

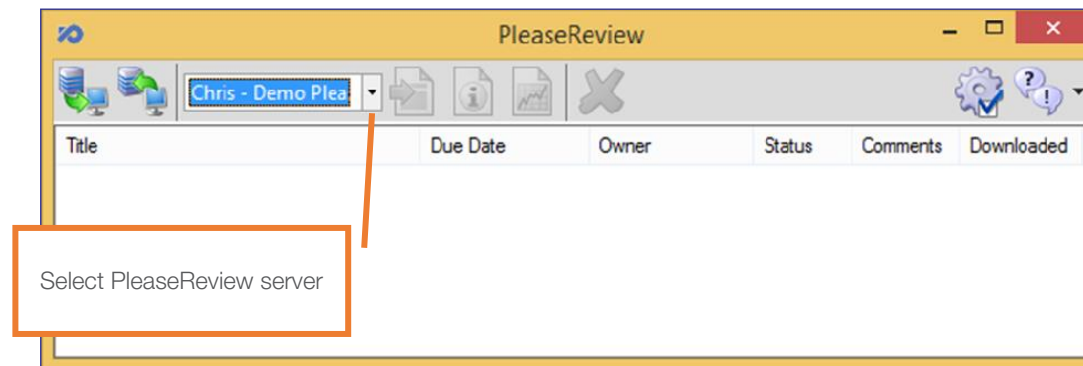
The Offline Client (OLC) is a free application which allows Reviewers to download reviews and make comments and proposed changes whilst offline. The comments can then be uploaded to the review when back online.

The OLC is a separate installation and its availability is controlled by a system configuration setting. If made available, the application needs to be installed locally on user's PCs.

Note: If you download a review which contains EditZones you will not be able to make comments or propose changes on the EditZones regardless of their status in the review - this is because the EditZone may have been updated by the time your comments are uploaded. See [EditZones in the OLC](#) for more information.

29.1 Downloading Reviews to the OLC

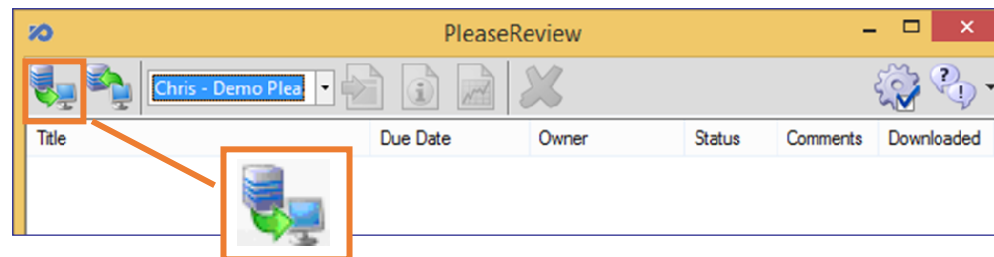
If you have access to more than one PleaseReview installation, you will need to select the correct server from the drop down list (see [Multiple Servers and Other Options](#)):



This will prompt you to enter your password to login to the selected server. Enter the same login details as when accessing PleaseReview online.

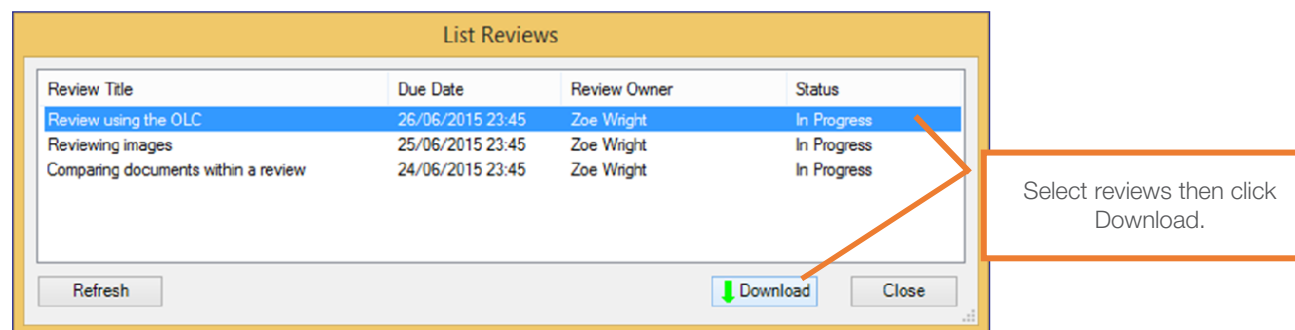


Once logged in, select the 'Download' icon to download your reviews:



You will then be presented with a list of reviews available to you. This list will be all reviews for which you are a Reviewer, and that are available for offline review, from all Workgroups. Note: if you have already downloaded a review(s) shown in the main window, it will not appear in this list.

Select the review(s) you wish to download. You can select more than one review at a time by holding down the Ctrl key as you select the reviews. Then click 'Download'.



The reviews will be downloaded into the main OLC window and your status in the online Review Control Panel will automatically be set to 'Offline'.

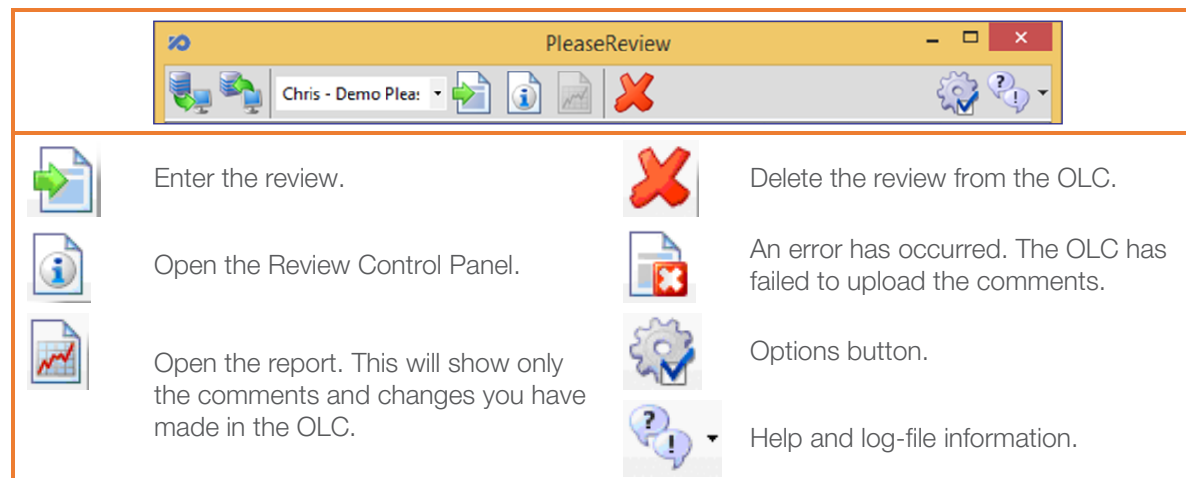
Note: if a review is closed, you can still download it but it will be read-only.



29.2 The OLC Inbox

The OLC inbox lists all reviews you have downloaded along with a brief summary of information.

Selecting a review activates the main toolbar:

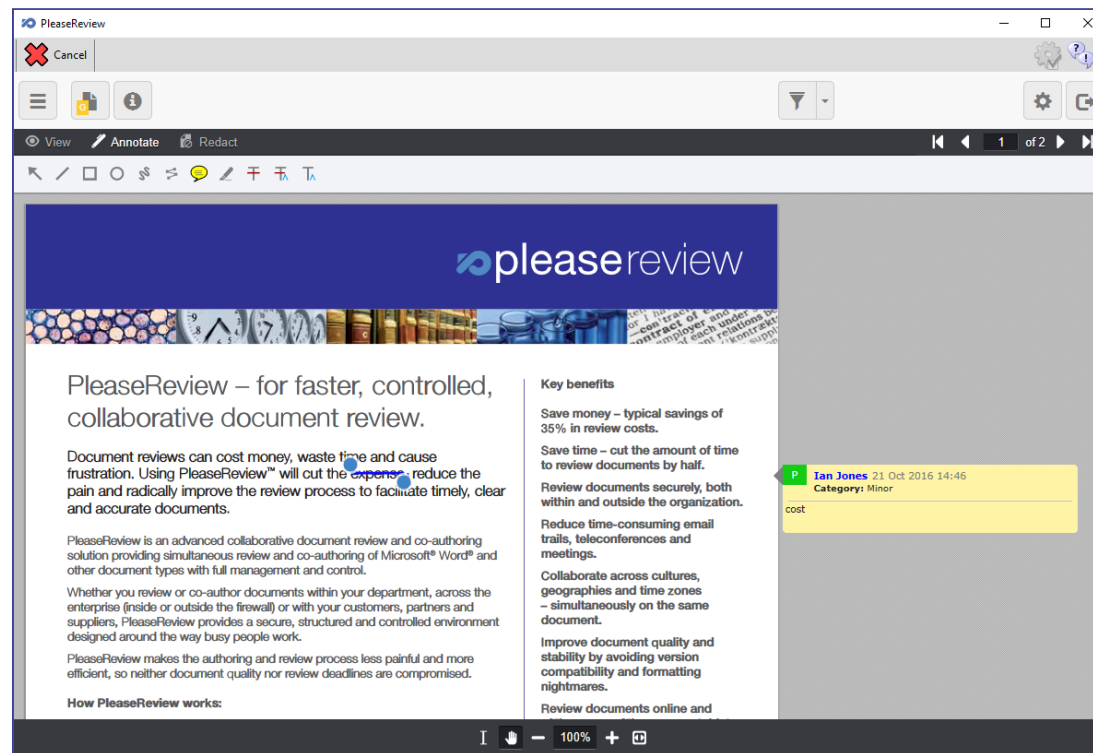




29.3 Reviewing with the OLC

The review experience using the OLC is as close as possible to the review experience when online. The review window offers the same functionality and is used in the same way.

For Microsoft Word and PDF documents, you are presented with the PleaseReview V6.1 review interface. For reviews containing other document formats, or those with ReviewZones and/or EditZones enabled, you are presented with the PleaseReview classic interface.





All comments and proposed changes on the review at the time of download will be displayed, and you can make new comments and proposed changes in the usual way.

Notes:

- It is not possible to edit a comment which you made online;
- It is not possible to access linked reviews via the OLC. It is, however, possible to access the document comparison;
- It is possible to create Bookmarks in the OLC but these will not be uploaded back to the main review when you upload your comments. They will be lost at this stage;
- Public Bookmarks created by others will be visible to you;
- You cannot add attachments to comments using the OLC;
- If a downloaded comment created by another participant has an attachment you will be able to see that there is an attachment on the comment but will not be able to view it.

On leaving the review, you are invited to set your review status and review 'watch' status and enter any summary comments. Note: your review status in the Review Control Panel was automatically set to offline when you downloaded the review. Once the review is uploaded, your status will be set to the selected option.

Having clicked 'OK', you will be taken back to the main OLC window.

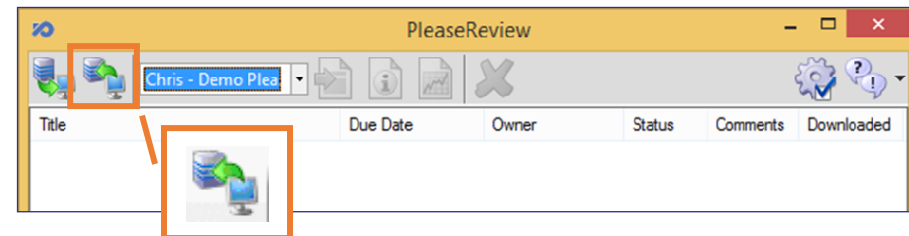


29.4 Uploading Comments Back to PleaseReview

When you are back online you can use the upload functionality to return comments and proposed changes to the server and automatically remove the review from the OLC.

Select the 'Upload' icon:

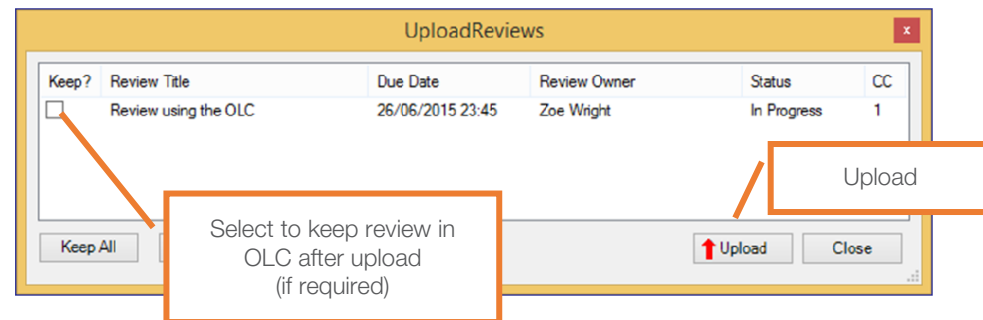
The upload reviews dialog box will open, displaying all your reviews on the OLC. All reviews will be automatically uploaded and deleted from the OLC unless you select 'Keep'.



In selecting the 'Keep' checkbox, the review will be updated. Any comments you have made which have not been uploaded will be uploaded, and the entire review will be automatically downloaded again.

If you do not check the 'Keep' box, the reviews will be removed from the OLC regardless of whether you have commented upon them or not.

You will receive a confirmation that the upload has been successful and you can close the window.



The comments you made will be added to the main review on the server with the date and time of the comment being shown as the upload date/time.

Please note: If the Review Owner has deleted the review but it is still in the recycle bin (if enabled) the OLC will still successfully upload comments. The Review Owner will get the standard watching email notification if watching the review.



29.5 ReviewZones in the OLC

The OLC will respect ReviewZones i.e. if you are a participant and you download a review which has ReviewZones configured, then the permissions will be respected in the OLC. Note: reviews containing ReviewZones are presented in the PleaseReview classic interface.

29.6 EditZones in the OLC

If you download a review which contains EditZones you will not be able to make comments or propose changes on the EditZones regardless of their status in the review as the EditZone may have been updated by the time your comments are uploaded. If you are the Contributor assigned to the EditZone you will not have any of the EditZone features (i.e. download, upload) available. Note: reviews containing EditZones are presented in the PleaseReview classic interface.

All EditZones in the downloaded review will appear with the same shading as in the online review, however, they will effectively be locked. When navigating by Contents mousing over any paragraph within an EditZone will show a 'no entry' icon and you will be prevented from opening the comment window. Even EditZones that are published for comment cannot be commented on.

If you select to navigate by Comments any comments which have already been made on an EditZone will be listed in the navigation pane. If you click on a listed comment the comment window will open so that you can see existing comments but you will be prevented from making further comments:

If you select to navigate by EditZones, all EditZones will be listed in the navigation pane. If you click on a listed EditZone the comment window will open with just the Zones tab available and display summary information about the EditZone.

Note: it is possible that by the time you are ready to upload comments made in the OLC that the review Owner may have assigned an EditZone which includes a paragraph where you have commented. In this instance the upload of the comment(s) will fail, see [EditZones Assigned after Download to OLC](#) for more information.

comments on Sample policy document.doc Paragraph Id 1.5

Comments Bookmarks refresh

enter an optional comment:

You cannot make new comments

paragraph text

For security to be effective, it must start at the top of an organization. It must permeate every level of the hierarchy. Senior management must make decisions on what should be protected, how it should be protected, and to what extent it should be protected. These findings should be crafted into written documents.

Category: Minor Close

Navigate by: << Comments >>

other comments: ☒ Track Changes

Comment (1) by Sue on 4 Oct 2011 10:47

Category : Minor Last Updated: 4 Oct 2011 10:51

Sue (4 Oct 2011 10:47)

this comment was made online



29.7 OLC User Settings

If you amend your user settings from within the OLC, the amended settings will persist for the same review (i.e. you can enter and leave the review or even close and restart the OLC application itself). However, the changes will not apply to other reviews (even if they are from the same server). Thus user settings when set in the OLC are specific to each review.

When you re-sync the review, the settings will revert back to your online settings.

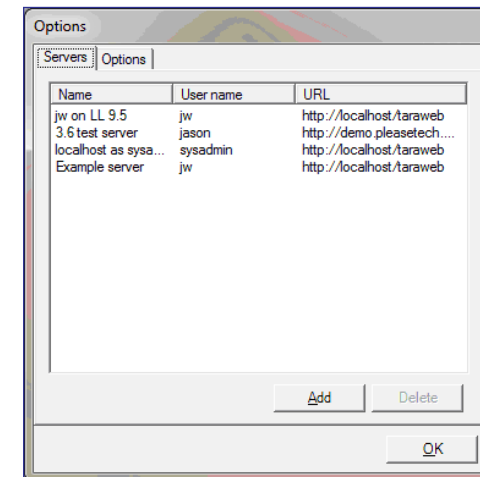


29.8 Multiple Servers and Other Options

The OLC has the capability of working with multiple PleaseReview servers. In the event that you have multiple servers defined (under options), you will have a server selector appear on the inbox to the right of the upload/download icons.

All actions and displays in the OLC are selected server-specific. Therefore, the list of reviews in the OLC inbox is solely for the server selected. Uploads and downloads are likewise server-specific.

The 'Options' icon gives you the ability to add servers and set other options. The 'Servers' tab allows the addition/deletion of servers. Simply follow the server set-up wizard, or select the server and delete it.



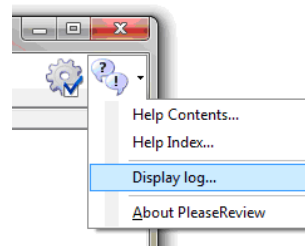
The 'Options' tab allows the setting of two connectivity options:

	Ask when connecting to network	This will ask the user if they wish to proceed when they ask the OLC to perform an action that would require a network connection. Normally used if the user is on a slow or costly connection like a mobile phone.
	Don't use Internet Explorer Proxy settings	This option stops the OLC from using the same route to the Internet as MS Internet Explorer (IE). The OLC will attempt to directly connect to any servers listed, rather than use any IE-defined web-proxies. This is only required if the user is having problems talking to the PleaseReview server and should only be selected after consultation with support personnel.



29.9 Help and Log Files

The Help option offers access to the help and to the log file which may be required for connectivity purposes.



The display log option displays the OLC log file for trouble shooting purposes:

A screenshot of the 'Log Viewer' window. The title bar says 'Log Viewer'. The window contains a list of log entries with timestamps and messages. A toolbar at the top of the window has four icons: a green circular arrow (refresh), a blue floppy disk (save), a blue document with a red 'X' (delete), and a red 'X' (delete).

A green circular arrow icon.	Refresh the log.	A blue floppy disk icon.	Save the file as a .log file to a known location.
A blue document icon with a red 'X'.	Copy the contents to the clipboard for pasting into an email or other location.	A red 'X' icon.	Delete the log.

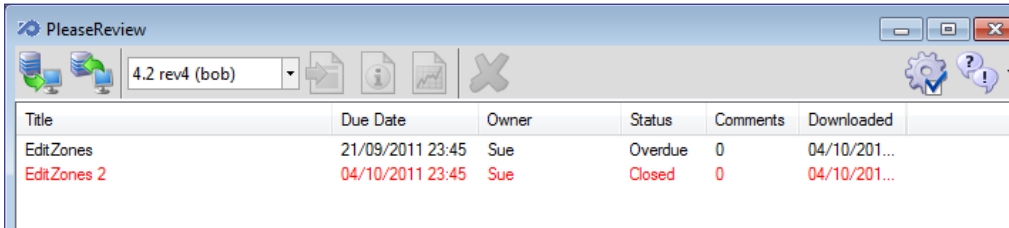


29.10 Using the OLC as an Author/Owner

If you are an Author or review Owner you can download any reviews which are available for offline review with a status of 'In Progress' or 'Closed'.

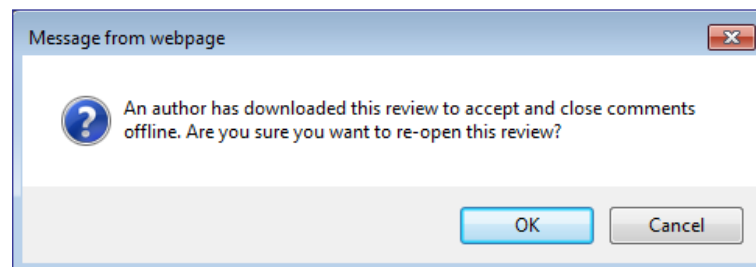
However, for reviews which are 'In Progress' the ability to accept and close comments/changes will not be available. If the review is 'Closed' then you will be able to accept and close comments/changes, although you cannot merge proposed changes.

Closed reviews will be highlighted in red in both the List Reviews screen and the main OLC window:

A screenshot of the PleaseReview OLC window. The window title is 'PleaseReview'. It has a toolbar with icons for database, refresh, save, print, and close. A dropdown menu shows '4.2 rev4 (bob)'. Below the toolbar is a table with columns: Title, Due Date, Owner, Status, Comments, and Downloaded. The table has two rows: 'EditZones' and 'EditZones 2'. The second row is highlighted in red.

Title	Due Date	Owner	Status	Comments	Downloaded
EditZones	21/09/2011 23:45	Sue	Overdue	0	04/10/201...
EditZones 2	04/10/2011 23:45	Sue	Closed	0	04/10/201...

If the review Owner attempts to re-open a closed review online whilst any Author has their participant status set to offline, the system will display a warning message:



If the Owner continues and re-opens the review, the Author that has the review downloaded will get a warning when they attempt to upload their comments. See [Closed Review Re-Opened after Download to OLC](#) for more information.



30 Flight Mode

Flight Mode is an alternative offline review option to the Offline Client, designed specifically for use on tablets and Apple Mac but can also be used on a PC.

It allows participants to access reviews of Microsoft Word documents only, where they can make comments and propose changes whilst offline. The comments can then be uploaded to the review when back online.

Flight Mode uses HTML5 and therefore is not compatible with older browsers (IE9 and earlier).



30.1 Downloading Reviews for Flight Mode

Before using Flight Mode for the first time, it is necessary to bookmark the Flight Mode page so that it can be accessed offline.

To download documents to review offline, click the 'Flight Mode' link on the PleaseReview homepage. The Flight Mode screen will be displayed listing all reviews available for you to download. Select the reviews then click 'Download':

The screenshot shows the PleaseReview Flight Mode interface. On the left, there is a sidebar with the PleaseReview logo, a 'return to PleaseReview' link, and a section titled 'PleaseReview flight mode' with instructions on how to use the offline mode. The main content area is divided into two sections: 'online reviews' and 'offline reviews'. The 'online reviews' section has a 'refresh content' link and two tabs: 'Reviews I'm in' and 'Reviews I own'. Below the tabs is a table of online reviews. The 'offline reviews' section shows a table of reviews that have been downloaded. Annotations with orange boxes and arrows highlight key features: a box around the 'online reviews' header, a box around the 'Select the reviews to take offline' text with an arrow pointing to the checkboxes in the online reviews table, a box around the 'Download' button, a box around the 'offline reviews' header, a box around the 'Downloaded reviews display here' text with an arrow pointing to the offline reviews table, and a box around the 'Download' button.

online reviews [refresh content](#)

[return to PleaseReview](#)

PleaseReview flight mode

To download reviews for offline access, select them from 'reviews online' section and click 'download'.

Once the reviews are listed in 'offline reviews' section you can enter the flight mode review from here.

When you are back online, you can upload comments you made in flight mode by selecting the review and clicking the 'upload' button.

online

offline reviews

Due Date	Review Title	Status	
7 Nov 2016 11:45 PM	Quality Assurance Policy Review	In Progress	<input type="checkbox"/>
3 Oct 2016 11:45 PM	Data Retention Policy Review	In Progress	<input type="checkbox"/>

Select the reviews to take offline

Download

After selecting reviews, click 'Download'

Due Date	Review Title	Owner	Review Status	My Status	CC	
5 Sep 2016 11:45 PM	Security Policy Review	Stef Brown	In Progress	Offline	0	Enter <input type="checkbox"/>

Downloaded reviews display here

Upload **Upload and keep** **Delete**

As Flight Mode supports Microsoft Word documents only, reviews which do not contain any Word documents will not be listed as available for download. Reviews containing mixed document formats including at least one Word document will be listed but only the Word document(s) can be downloaded.



30.2 Reviewing in Flight Mode

Once offline, the Flight Mode screen, which you have bookmarked, will display your downloaded reviews:

PleaseReview flight mode

To download reviews for offline access, select them from 'reviews online' section and click 'download'.

Once the reviews are listed in 'offline reviews' section you can enter the flight mode review from here.

When you are back online, you can upload comments you made in flight mode by selecting the review and clicking the 'upload' button.

offline

offline reviews

Due Date	Review Title	Owner	Review Status	My Status	CC	
7 Nov 2016 11:45 PM	Quality Assurance Policy Review	Stef Brown	In Progress	Offline	0	Enter
3 Oct 2016 11:45 PM	Data Retention Policy Review	Stef Brown	In Progress	Offline	0	Enter
5 Sep 2016 11:45 PM	Security Policy Review	Stef Brown	In Progress	Offline	0	Enter

Downloaded reviews display here

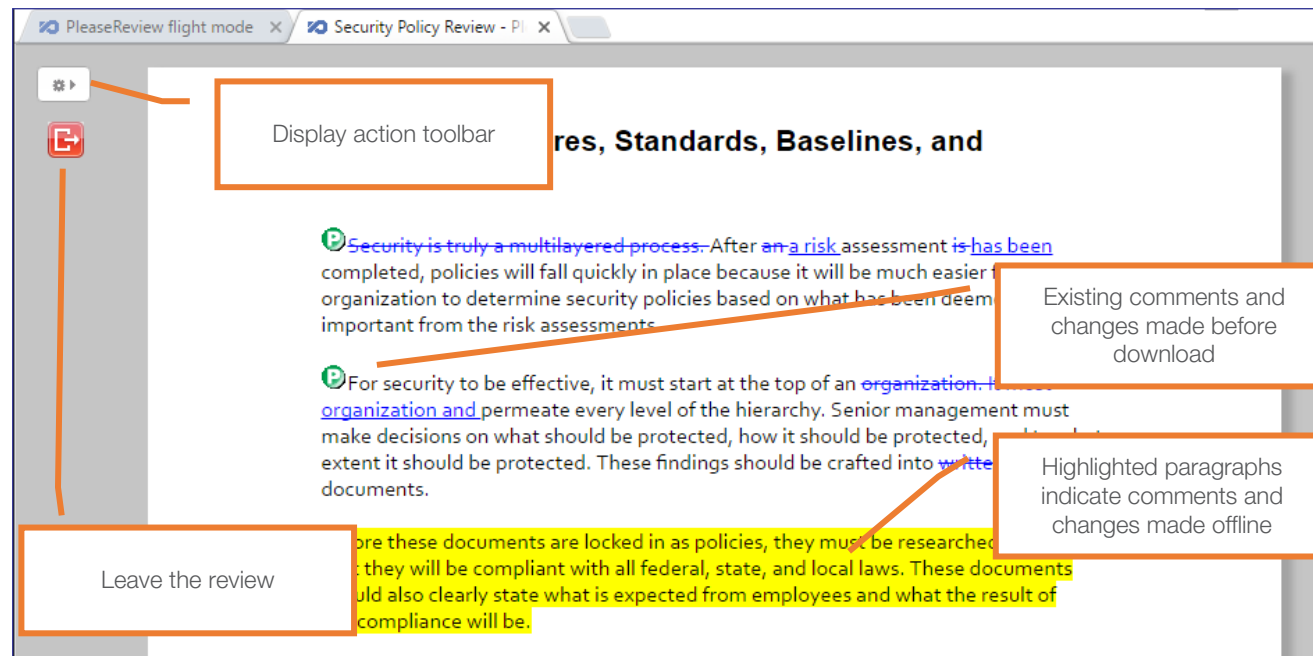
Current Internet status

Click 'Enter' to open the review in a new window

Important - You must NOT clear your browser cache whilst using Flight Mode as it will delete all documents and comments made offline.






To enter a review, click the 'Enter' link for the relevant review. The review interface will open in a new browser window.




All comments and proposed changes on the review at the time of download will be displayed, and you can make new comments and proposed changes in the usual way.







Clicking the toolbar icon will display the action toolbar:






Sample CTR (3_5) for new




 <p>Opens the comment window to allow the user to make a 'General Comment' or view the general comments of others.</p>	 <p>Opens the Offline Reconciliation Report displaying all comments and proposed changes which have been made whilst in Flight Mode.</p>
 <p>Opens the Online Reconciliation Report displaying all comments and proposed changes which had already been made before the review was downloaded.</p>	 <p>Refreshes the document.</p>

To display another Word document in the review, you can select it from the drop down list on the toolbar:



Sample CTR (3_5) for new



Sample CTR (3_5) for new review.doc
Sample policy document.doc
Feedback.docx

Notes:

- The comment window will always appear as a pop-up window;
- Paragraphs where you have added comments or made proposed changes whilst in Flight Mode will display highlighted;
- Proposed changes made whilst in Flight Mode do not display as tracked changes in the document view but the mark-up is shown in the comment window;
- You cannot start or contribute to discussion threads whilst in Flight Mode;
- Authors cannot accept or close comments in Flight Mode.

On leaving the review, you are invited to set your review status and review 'watch' status and enter any summary comments.

Note: your review status in the Review Control Panel was automatically set to offline when you downloaded the review. Once the review is uploaded, your status will be set to the selected option. Having clicked 'OK', you will be taken back to the main Flight Mode screen.



30.3 Uploading Comments Back to PleaseReview

When you are back online you can upload your comments and proposed changes made whilst offline:

offline reviews

Due Date	Review Title	Owner	Review Status	My Status	CC		
7 Nov 2016 11:45 PM	Quality Assurance Policy Review	Stef Brown	In Progress	Offline	0	Enter	<input type="checkbox"/>
3 Oct 2016 11:45 PM	Data Retention Policy Review	Stef Brown	In Progress	Offline	0	Enter	<input type="checkbox"/>
5 Sep 2016 11:45 PM	Security Policy Review	Stef Brown	In Progress	Offline	1	Enter	<input type="checkbox"/>

Upload Upload and keep Delete

There are two upload options available:

Upload	This will upload the comments and remove the review from the 'offline reviews' list.
Upload and keep	This will upload the comments and keep the review in the 'offline reviews' list.

Once you have clicked your upload option the comments will be uploaded. This may take some time depending on the size of the documents in the review and the speed of your network connection.

There is also the option to delete any downloaded reviews by selecting them using the checkbox to the right of the review, then click 'Delete'.

Note - Downloaded reviews will not be automatically updated. If you wish to see the latest version of the review you must click 'refresh content' at the top of the screen.



31 Upload Errors

There are five types of errors you may encounter when uploading comments and proposed changes from either the Offline Client or Flight Mode back to PleaseReview. This section covers the errors and the options available.

Note that the OLC will provide a greater number of options to resolve errors, whereas Flight Mode will provide a report to warn you of the error but may not provide the options to resolve it.

31.1 Comments and Changes Closed After Download

There is the possibility that a review Author/Owner has closed a comment or proposed change to which you have replied or that the comment/change has been deleted. In this event the OLC will note the error and warn you:

	Abort	Aborts the upload. Any comment or change already uploaded will remain uploaded but no additional attempt will be made to upload further comments or changes.
	Retry the upload	Attempts again to upload the comment that just failed. This potentially allows you to contact the review Owner and/or an Author and ask them to reopen the comment.
	Skip this comment	The current comment is marked as being in error and the next comment is uploaded. If you select the Skip any other errors like this check box, any other closed/deleted comments errors are not shown again, but the comments are marked as being in error on the upload report. Note: Any serious (hard errors) such as a network or a server fail are not skipped.

Regardless of the action selected the next step will be the uploaded reviews report which confirms the number of failed comments.

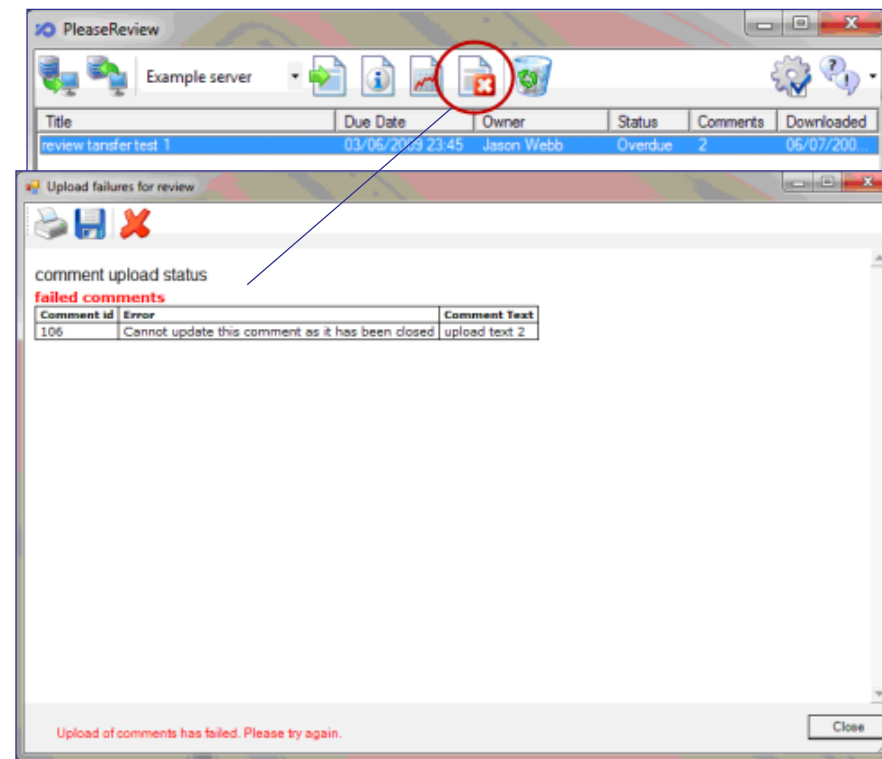
Note: The OLC keeps a list for each review of the comments it has uploaded. These comments will never be uploaded again.



Once you click 'close', the main review management window will list the failed reviews (or all reviews not uploaded if there were multiple reviews and the process was aborted).

Selecting a failed review will highlight the error icon on the top toolbar. Selecting the error icon will open the error report which contains more information.

To rectify the situation, re-enter the review, delete the appropriate comment(s) and re-upload the review. The comments can be notified to the review Owner by email or another appropriate means.





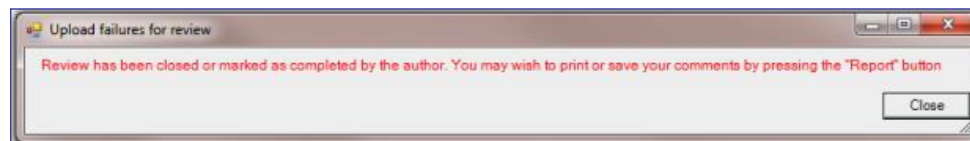
31.2 Review Closed After Download

There is the possibility that a review Owner has closed or completed a review to new comments and you have yet to upload your comments. In this event the OLC will note the error and warn you.

Clicking 'Close' on the uploaded reviews report will close the report notification and the upload reviews window, leaving the inbox with the review in error.

Note: the review(s) not in error will be uploaded in the normal manner. The review in error will be retained in the OLC and will appear in red text and the comment upload summary will note the number of reviews in error.

Selecting the review will activate the grayed out icons. Clicking on the error icon will simply activate a notification of the issue.



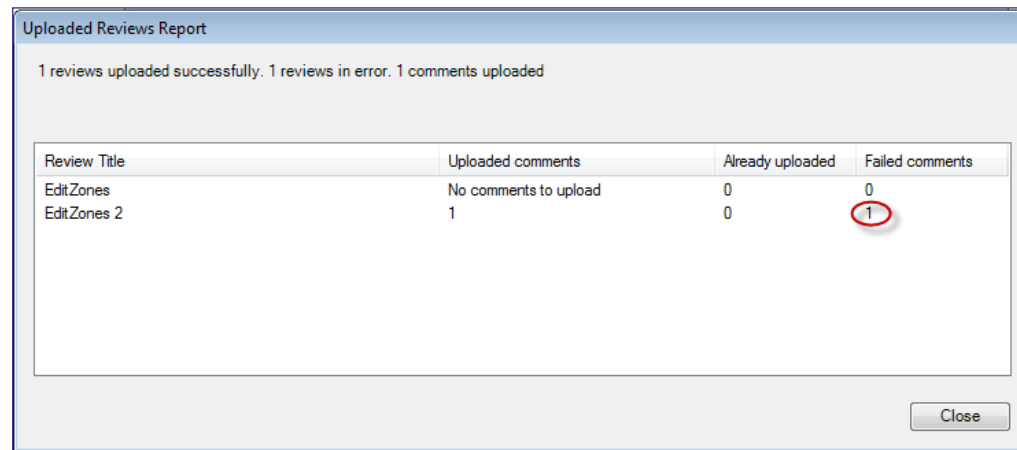
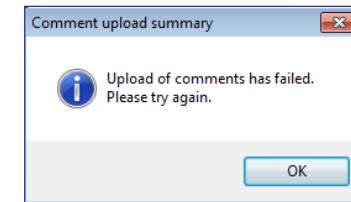
If you wish to preserve your comments on the review and ensure that the review Owner has sight of them, it is recommended that you open the review report (using the 'Report' icon) and save the report using the 'Save as' button. You can save the report as standard html or as 'Web Archive, single file'. This file can then be emailed to the review Owner as a separate manual operation.



31.3 EditZones Assigned After Download

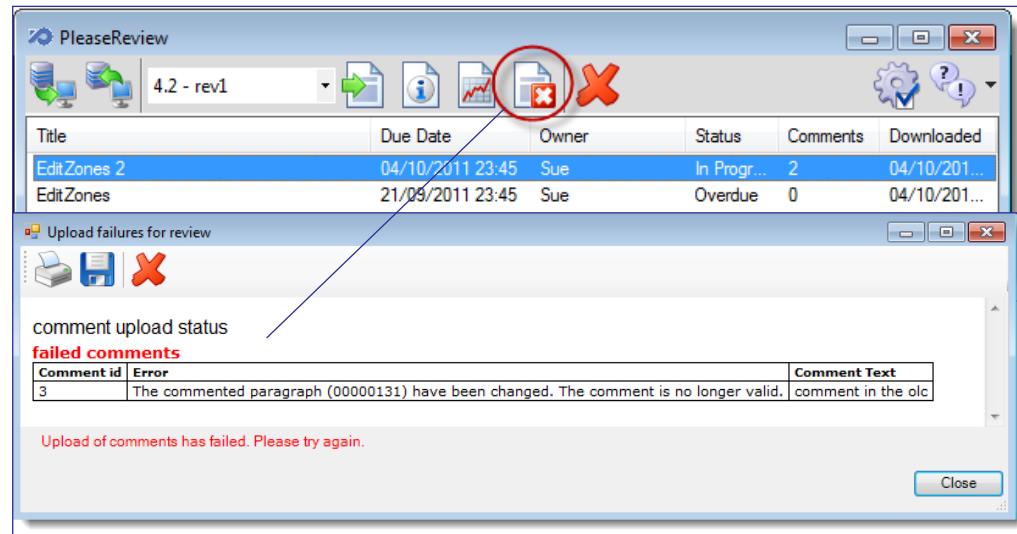
It is possible that the review Owner may assign new EditZones in the review after you have downloaded it to the OLC. If you make a comment on a paragraph which is subsequently included in an EditZone the uploading of your comments from the OLC will fail. In this instance you will see a warning message.

Clicking OK will display the Uploaded Reviews Report:



Once you click 'close', the main review management window will list the failed reviews (or all reviews if some were 'kept').

Selecting a failed review will highlight the error icon on the top toolbar. Selecting the error icon will open the error report which contains more information.

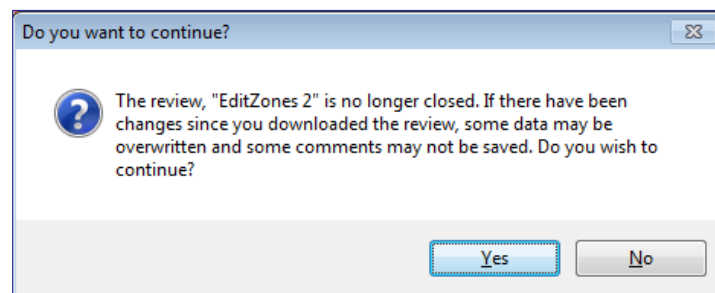


To rectify the situation you can re-enter the review, delete the appropriate comment(s) and re-upload the review. The comments can be notified to the review Owner by email or another appropriate means.



31.4 Closed Review Re-Opened After Download

It is possible that the review Owner may have re-opened the review since it was downloaded into the OLC. If this is the case when you attempt to upload the review you will see the following warning:



If you continue you will be notified if any comments fail to upload. You can then access the error report as described in the previous section to see which comments are affected.

31.5 General Connectivity Issues

If you have a general connectivity issue you will need to contact support. You may be asked to provide the log file (applicable to OLC only). See [Help and Log Files](#).



Notices

All trade names, trademarks, and service marks are the rightful property of their respective Owners.