Veeva Vault User Manual

Contents

Introduction

This document is provided as a reference source for users of the PleaseReview and Veeva Vault product, hereafter known as the Veeva Vault integration.

Note: This document refers only to the integration of PleaseReview and Veeva Vault and addresses PleaseReview actions when initiated through the Veeva Vault interface. Familiarity with the Veeva Vault interface and functionality is assumed.

In principle, the standard PleaseReview functionality is simply reflected through the Veeva Vault User Interface (UI).

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). The participants, by default, are allocated a Veeva Vault task which directs users to access the review from their personal review list in the 'PleaseReview' tab within Veeva Vault.

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 select the 'Finish PleaseReview' option on the menu with the option to check in a new version of the document (Word and Excel). The review is now archived and read-only. The Owner can choose to close the review early, if required.

In addition to collaborative reviews, PleaseReview also supports independent reviews whereby 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.

Native PleaseReview Interface

If you have a requirement to use PleaseReview features not available in the Veeva Vault UI, it is possible to access the native PleaseReview user interface from the PleaseReview 'Reviews I Own' inbox, providing you have Author permissions:
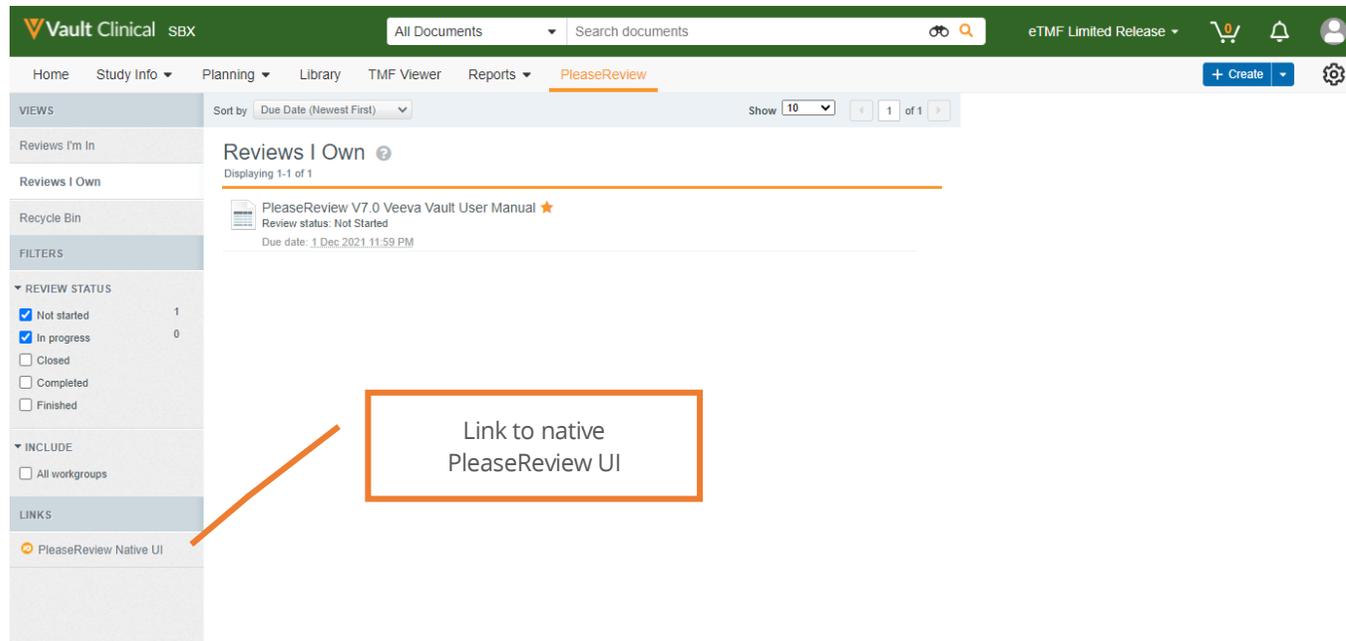
Link to native PleaseReview UI

Notes:

- If you are using PleaseReview within Veeva Vault and native PleaseReview, do not use them simultaneously with the same browser
- Reviews created within the PleaseReview native UI can be seen and accessed within the Veeva Vault UI but will not have a Veeva Vault workflow generated.
- PleaseReview will send email notifications about the review if the review was created within the PleaseReview native UI.
- **Important: Reviews created in the Veeva Vault UI MUST NOT be edited in the PleaseReview native UI;**
- Reviews created within the Veeva UI will be easily identifiable by having a date and time stamp attached to the title e.g [17/11/2020 11:24:56] and the review description will contain 'Created from Vault UI'.

Native PleaseReview Features

The table lists the PleaseReview features not available in the Veeva Vault UI. For full details, refer to the PleaseReview User Manual.

Feature	Description
Workgroups	Workgroups provide a 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.
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.
User Types	The PleaseReview System Administrator can define User Types and select the functionality available for each type.
Multi-phase reviews	Provides additional flexible review workflows with options for sequential, multi-phase reviews in which each phase may be collaborative or independent.
Review Types	Review types provide standard review templates. This means that review Owners setting up reviews do not need to make all or any of the decisions normally encountered in the new review wizard when setting up a review.
Sub reviews	Sub-reviews allow a review participant to create 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.
Subteams	Subteams allow the review Owner to put participants of their review into Subteams whereby the participants in each Subteam only see each other's comments and proposed changes. The Owner, and any Authors in the review, see all participants' comments and proposed changes from all Subteams.
Feedback Documents	Feedback documents allow participants to provide overall 'high level' feedback on the document/document set. Feedback is typically provided by ratings and/or the recording of points against a set of questions.
Comparison and linking	There are two ways to provide document comparison. Either comparing documents in the same review or comparing documents between reviews.
Delegation	This allows a user to delegate their role on a review to another user.

Important Notes

The PleaseReview fields found in the document information should NOT be edited. This will result in unexpected behavior within PleaseReview.

When using Internet Explorer, you may have to add the PleaseReview base site URL (e.g. https://your-company.pleasereview.net) as a "trusted site", in order to be able to access the PleaseReview tab from within the Vault UI.

Review Interfaces

Since PleaseReview v6.4, Microsoft Word and PDF documents are presented in the new review interface by default. This interface has been designed to be intuitive to users and work on all devices.

All other document formats, and Feedback documents included in a review will automatically be presented in the classic interface.

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, image collections, 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.

All other document types that are not directly supported are handled at a document level. This means that comments can only be made on the whole document rather than on individual parts.

Other Information Sources

This document is pertinent to the Veeva Vault integration only. PleaseReview includes comprehensive online help and training movies which can be accessed via the 'Help' button on the toolbar.

Also refer to the PleaseReview User Manual which is available from the Help home page.

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.

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		✓

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

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 zones to Reviewers (make areas read-only or hidden to some/all participants)	✓	
Assign zones to other contributors	✓	

Contributor Roles

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

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

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

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

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

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

Super-Contributor Role

A Super-Contributor has the permissions of an Author and Contributor combined within a review. So, they can accept, and close comments made by any participant and have edit-in-Word zones 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 zones to themselves anywhere in the document (if it is available).

User Types

The PleaseReview System Administrator can 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.

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. 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.

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.

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 can 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.

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.

The PleaseReview Inbox

The PleaseReview inbox can be accessed from the PleaseReview tab on the top menu of Veeva Vault:
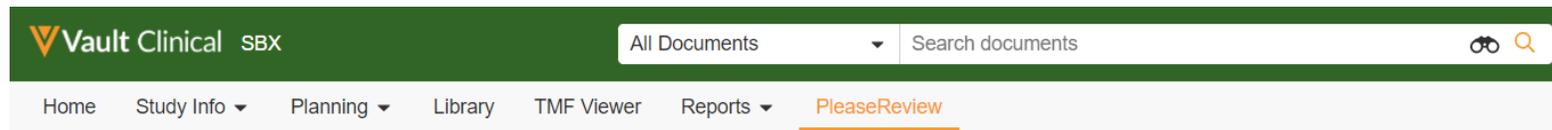
The PleaseReview inbox lists all your reviews:

View	Description
Reviews I'm In	A list of all reviews to which you have been invited to participate.
Reviews I Own	A list of all reviews you have created (only Authors will see this view).
Recycle Bin	A list of all reviews you have created and subsequently deleted.

Reviews I'm In

The 'Reviews I'm In' tab displays a list of all reviews to which you have been invited to participate

You can sort your list of reviews using the 'Sort by' drop-down list at the top of the screen and you can also filter your list of reviews by your status in the review (see My Status).

My Status

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.

FILTERS

▼ MY STATUS
- ☑ Not started   5
- ☑ In progress   0
- ☐ Completed

▼ INCLUDE
- ☐ Closed reviews
- ☑ All workgroups

Including 'All workgroups' displays all reviews you are in, regardless of which Vault they were created in. This includes any reviews that may have been created in native PleaseReview.

Reviews I Own

The 'Reviews I Own' tab displays a list of all reviews you have created. Note, only users with Author permissions will see this view.

You can sort your list of reviews using the 'Sort by' drop-down list at the top of the screen and you can also filter your list of reviews by the review status (see Review Status).

Note: The orange warning triangle appears if the associated PleaseReview workflow has been manually cancelled in Vault (see Cancelling the Veeva Vault Workflow).

The 'Resync Roles' button Resync Roles will appear next to the review name in the 'Reviews I Own' tab if a new participant has been added in the active workflow or if a participant in an existing active task is reassigned to a new participant.

Reviews I Own ❓

Displaying 1-1 of 1

Multi doc review 1 ⭐
Review status: In Progress
Due date: 11 Aug 2022 11:59 PM

Close Complete **Resync Roles**

Control Panel

1. To add new participants, in Active Workflows view on the Home tab, select the action menu and click 'Add Participants'.

Active Workflows

↑ Status

→ Invite to PleaseReview: Envelope > Multi doc review 1
⊞ Show more

＋ Add Participants
✉ Email Participants
⊗ Cancel Workflow

2. Select new users to add as workflow participants and click 'Submit'.

3. To reassign an active task to a new participant, in Active Workflows view on the Home tab, expand the review details and select the actions menu next to the participant and select 'Reassign'.

Invite to PleaseReview: Envelope > Multi doc review 1
⊟ Show less

Owner Nisha Rani Thiyagarajan

▶ Complete a PleaseReview   •••

⇄ Reassign
🗓 Update Task Due Date
⊗ Cancel Task

User1 Test
Due: 11/08/2022

▶ Complete a PleaseReview   •••

User2 Test
Due: 11/08/2022

4. Select the new task owner and click continue to save changes.

Reassign Task   ✕

Please choose a new user to assign this task.

• Object record: Multi doc review 1
• Task: Complete a PleaseReview
• Current task owner: User1 Test

New task owner

Start typing to see a list of users...   ▼

Cancel   **Continue**

5. Go to PleaseReview inbox under the 'Review I Own' tab, the 'Resync Roles' button appears here because the newly added/reassigned participant(s) does not exist in PleaseReview Review.

Note: "Resync Roles" button visible only in "In Progress" status.

Reviews I Own ❓
Displaying 1-1 of 1

Multi doc review 1 ⭐
Review status: In Progress
Due date: 11 Aug 2022 11:59 PM

Close Complete **Resync Roles**

Control Panel

6. Click the 'Resync Roles' button to sync the participant into Review.
   Message displayed for newly added participant:

Sort by Due Date (Newest First) User3 Test added as Author

Reviews I Own ❓
Displaying 1-1 of 1

Multi doc review 1 ⭐
Review status: In Progress
Due date: 11 Aug 2022 11:59 PM

Message displayed for reassigned participant:

A red exclamation mark(**!**) icon will show under the 'Review I own' tab if the newly added/reassigned participant(s) does not exist in PleaseReview database.

When you see this icon, please re-sync users in PleaseReview PR_VaultUI workgroup.

Review Status

Review Status	Description
Not started	The review has not started yet. It can be started from the review inbox.
In progress	The review is in progress and visible to all participants.
Closed	The review has been closed by the Owner. The Owner, and other appointed Authors, can still work on the review (i.e. accept/close comments etc.) but it is closed to Reviewers. Participants can still enter the review as read only.
Completed	The review has been completed by the Owner and is read only for everyone.

Including 'All workgroups' displays all reviews you own, regardless of which Vault they were created in. This includes any reviews that may have been created in native PleaseReview.

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.

Using the Info button allows you to either 'Purge' or 'Restore' the review. 'Purge' will delete the review permanently whilst 'Restore' will return it to 'Reviews I own'. Only completed reviews can be restored. If a workflow is cancelled while in progress and is subsequently deleted it cannot be restored.

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

The Review Control Panel

The Review Control Panel provides summary information about the review. The Review Control Panel can be accessed from the review inbox by hovering over the review to display the Review Control Panel link.

Options from the Review Control Panel

Option	Description
Download	This downloads the review document with comments.
Report in PleaseReview	This opens the reconciliation report (see [The Reconciliation Report](#))

These options are also available via the PleaseReview Review Environment.

Accessing a Review

When a participant has been invited to a review, a task appears in 'My tasks'. A participant can access any review in which they are a participant via the PleaseReview tab on the top menu of Veeva Vault:
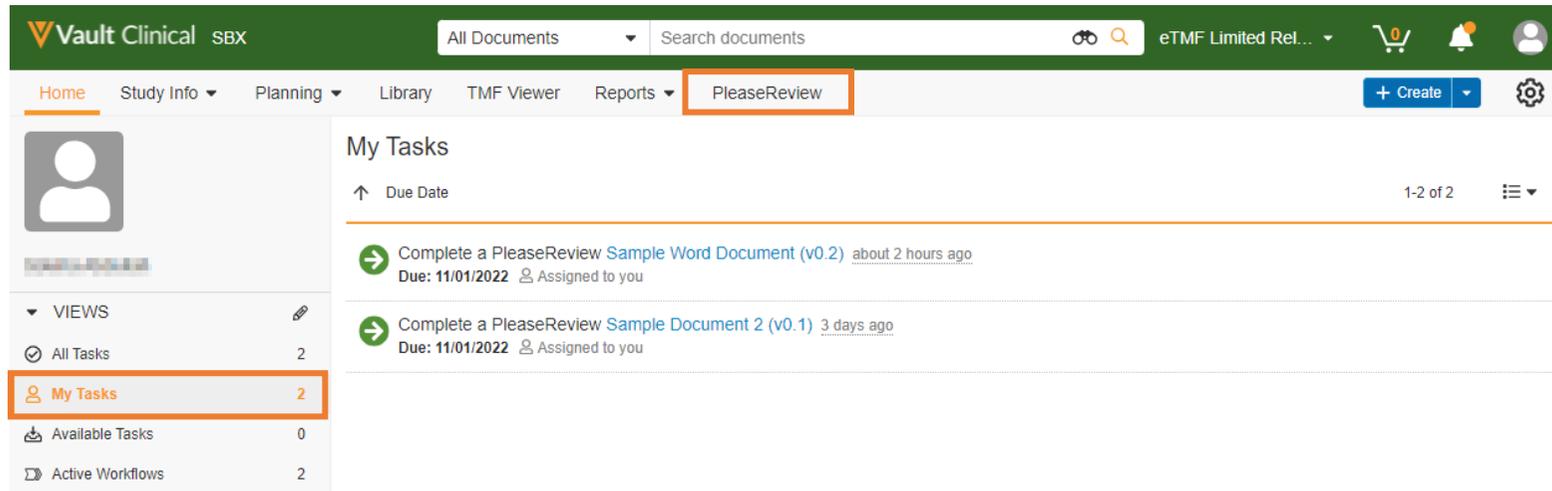
Clicking on the review title in the PleaseReview inbox will open the review (see The PleaseReview Inbox).

The review opens in a new window or tab (dependent on browser settings).

Creating a Review

Reviews can be created within Veeva Vault by users with Author permissions.

To create a new review, select the document from the library, then select the actions menu. The 'Prepare PleaseReview' option will be available from the actions menu:
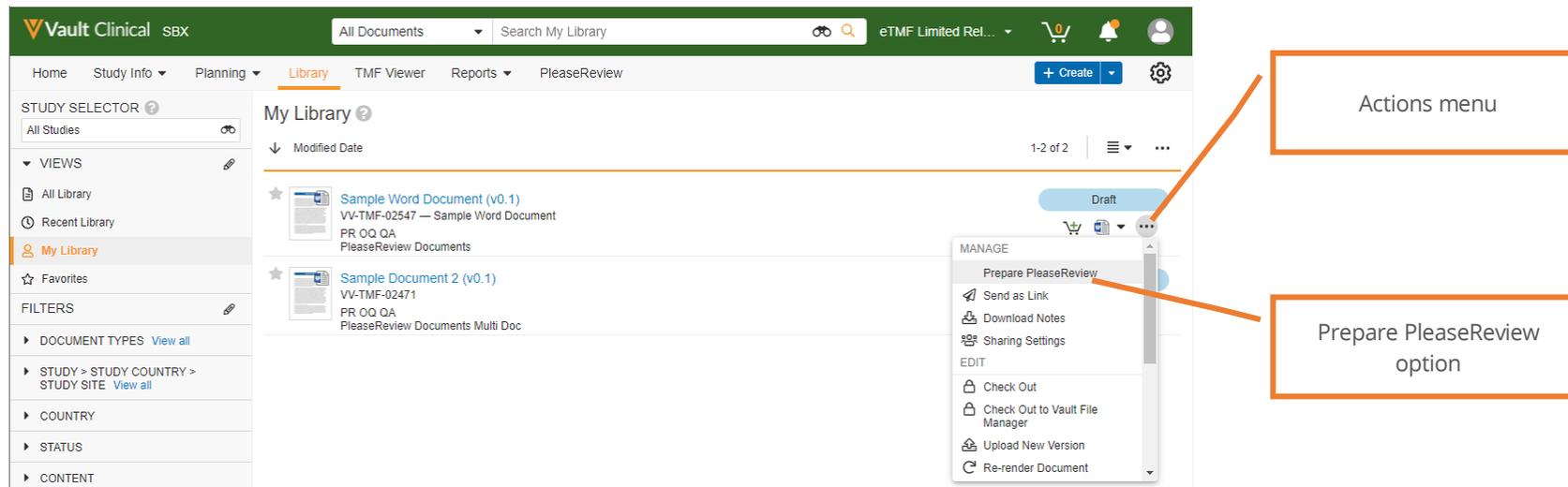
If you don't see the 'Prepare PleaseReview' options in the actions menu you either don't have the permissions to create reviews or the PleaseReview option hasn't been configured in your system.

Note: Veeva Vault will be configured to determine the document types and document lifecycle status where the PleaseReview option is available. Additionally, Authors can only create reviews on documents they have checkout permissions on.

Creating a Review Workflow in Veeva Vault

From v7.1 onwards the Veeva Vault will only have one review type as opposed to the 2 types in previous versions (Simple Review & Advanced Review). The new review type is an extension of the previous Advanced Review and can contain the following:

- Multiple documents;
- Non Veeva Vault users;
- Participants with a Super-Contributor, Author-Contributor, Author, Contributor, Reviewer or Viewer role;
- Zones;
- Different review option settings.

Step 1. Select Document

To create a review with multiple documents, add selected documents from the library to the cart.

Navigate to the Cart and 'Start Document Workflow' from the bulk actions menu

Select 'Prepare PleaseReview' and click on Continue.

Notes:

• Only documents in the same lifecycle can be used to create a review with multiple documents otherwise the option 'Prepare PleaseReview' will not be available

Step 2. Enter Review Details

In the 'Start Document Workflow' dialog box, add the following details:

- Description
- PleaseReview Title
- PleaseReview Due Date
- Add any Super-Contributor, Author-Contributor, Author, Contributor, Reviewer and/or Viewers by selecting the checkbox and adding users from the drop-down lists. If any of these roles are not required, leave the relevant boxes unchecked

Note: If non Veeva Vault users need to be added as participants, this is done at the next step.

Click 'Start'.

Start Document Workflow ✕

Description*

Prepare PleaseReview - 02/05/2022 🖩

Please provide the fields to prepare a PleaseReview review

PleaseReview Title*

[   ]

PleaseReview Due Date*

[dd/MM/yyyy]

☑ **PleaseReview Super-Contributor(s)***   Assigned to every user

[▼]

☐ **PleaseReview Author-Contributor(s)**

☐ **PleaseReview Author(s)**

☐ **PleaseReview Contributor(s)**

*Required to proceed   Cancel **Start**

Add review description → (Description field)

Add review title → (PleaseReview Title field)

Select the review end date → (PleaseReview Due Date field)

Select a role to add a participant → (role checkboxes)

Click 'Start' → (Start button)

Notes:

- Reviewers can be selected individually or a Veeva Vault group can be selected from the PleaseReview Reviewer's drop down list;

- Adding a participant as both an Author and a Contributor will give the participant the role of Author-Contributor;

- If not configured in the review set up, a participant can be made a Super-Contributor by adding them as a Contributor, then upgrading the role at a later step (see Upgrade Participants to Super-Contributor);

- The 'End Date' must be in the future, and the end time is 11:59PM. It is not possible to change the end time;

![Ideagen logo]

Step 3. Start the Review

Once step 2 has been completed, the document status is updated to 'Ready for PleaseReview'. Click on the document name you want to add as the primary document.

Updated document
status
'READY FOR
PLEASEREVIEW'

Clicking the document name opens the review in the document viewer. To start the review, select the actions menu, then select 'Start PleaseReview'

Step 4. Review Options

Once step 3 has been completed, a review summary will appear on screen along with confirmation that the review is created. At this stage, further changes can be made to the review, including:

- Add additional documents;
- Add non Veeva Vault users;
- Amend the review options;
- Enable Zones;
- Upgrade participants with a Contributor role to Super-Contributors.

Note: Should the review creation fail for any reason the success message (and green tick) will be replaced with a message (red error icon with white cross), explaining why the fail occurred. When this happens the 'PleaseReview' workflow will be undone, and it will be necessary to correct the reason for the failure before repeating the 'Prepare PleaseReview' steps.

VIEW

Review Summary

Advanced Options

Amend review options
and enable Zones

Review Summary

| Delete Review | Put Review on Hold | Start Review |

Review Creation Information

✓ The new review has been successfully created in PleaseReview.

Review Details

Title : MultiDoc Workflow 3

End Date : 09/06/2022 23:59:00

Status : Not Started

Documents

Add....

Add additional
documents

	File Name	Title	Type	Preparation
📄	Sample Word Document.docx	Sample Word Document (v0.3)	Review	Successful
📄	Sample Document 2.docx	Sample Document 2 (v0.2)	Review	Successful ⊖

Participants

Add External...

Add non Veeva Vault
users

Name	Email	Role	
June Tang	june.tang@Ideagen.com	Reviewer	
Nisha Rani Thiyagarajan	nisha.thiyaga@Ideagen.com	Owner-Contributor	
Soleha Abdullah	soleha.abdullah@ideagen.com	Super-Contributor	Downgrade
User1 Test	testuser1@pleasetech.com	Contributor	Upgrade

Upgrade Contributors
to Super-Contributors

Add Additional Documents to the Review

From the review summary screen, additional documents can be added to the review. To do this, click 'Add...' in the 'Documents' section of the review summary screen and select one of the four options:

Document Type	Description
Review	Vault document - available for comments and proposed changes.
Reference	Vault document - read-only within the review.
Local file - Review	Non-Vault document - available for comments and proposed changes (if local file upload is configured).
Local file - Reference	Non-Vault document - read-only within the review (if local file upload is configured).

If adding additional Vault documents, any available documents will display the green plus icon (⊕). Unwanted documents can be removed from the review by clicking on the red minus icon.

If adding additional non-Vault documents from local files, you will be able to browse and select files using standard browser file selection functionality.

Documents are identified as Vault or local files

Re-order documents using up/down arrows

Documents are identified as Review or Reference

Add Non-Veeva Vault Users to the Review

From the review summary screen, non-Vault users can be added to the review. To do this, click 'Add External…' in the 'Participants' section of the review summary screen and select the role to be assigned to the additional non-Vault user(s):

Participants			Add External...	
Name	Email	Role	Reviewer	
Clare Beazley	clare.tanner@pleasetech.com	Reviewer	Author	
John Tanner	john.tanner@pleasetech.com	Contributor	Author-Contributor	
Nick Angell	nick.tanner@pleasetech.com	Author-Contribu	Contributor	
Zoe Wright	zoe.wright@pleasetech.com	Owner-Contribu	Super-Contributor	
			Viewer	
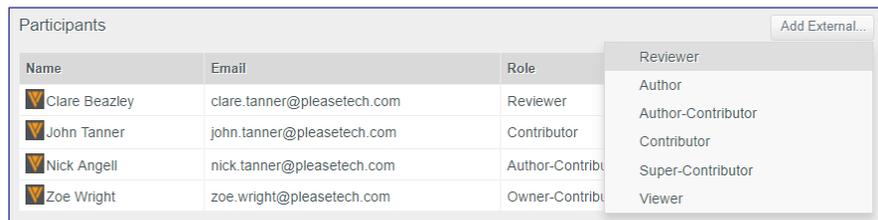
Additional non-Vault users can be added by clicking the green plus icon (➕). Users can be removed from the review by clicking the red minus icon.

Users are identified as Vault users or native Please Review users

Participants			Add External...
Name	Email	Role	
Clare Beazley	clare.tanner@pleasetech.com	Reviewer	
Dave Native	dave.tanner@pleasetech.com	Author	➖
John Tanner	john.tanner@pleasetech.com	Contributor	Upgrade
Nick Angell	nick.tanner@pleasetech.com	Author-Contributor	
Zoe Wright	zoe.wright@pleasetech.com	Owner-Contributor	

Upgrade Participants to Super-Contributor

To upgrade a participant to Super-Contributor, click the 'Upgrade' button next to the participant. The 'Upgrade' button is only available for users with the role of Contributor.

Note: It is also possible to downgrade Super-Contributors to the role Contributor.

Participants			Add External...
Name	Email	Role	
Clare Beazley	clare.tanner@pleasetech.com	Reviewer	
Dave Native	dave.tanner@pleasetech.com	Author	➖
John Tanner	john.tanner@pleasetech.com	Contributor	Upgrade
Nick Angell	nick.tanner@pleasetech.com	Author-Contributor	
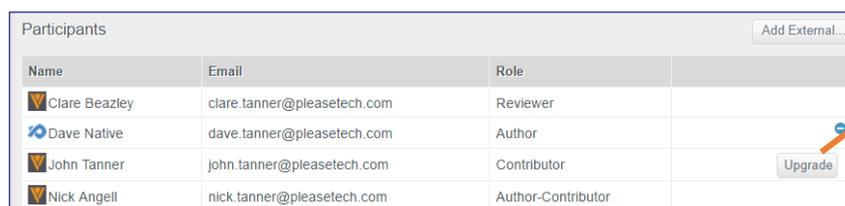
Upgrade to Super-Contributor

Amend Review Options

From the review summary screen, the review options and email options can be changed by selecting the 'Advanced Options' tab:

Options available:

	Option	Description
Review Options	Reviewers do not see each other's comments	Creates an independent review when selected. Reviewers will not 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 in review	If deselected, this option disables the proposed change functionality within the review and review participants can make comments only. They will not be able to mark-up the document.
	Force review participants to select a comment category	If selected, makes it mandatory for Reviewers to categorize comments and proposed changes.
Email Options (External Participants Only)	Send invitation emails to external participants	When selected, will send email invitations to non-Veeva Vault participants (If external participants configured).
	Reminder options	Populate to send reminder emails to non-Veeva Vault participants (If external participants configured).
Email Options (Vault Participants Only)	Send notification emails to Vault participants	When selected, will send email notifications to Veeva Vault participants.

Important – Click save after making any changes to the review or email options.

Creating a Review using the Word Plugin

If using Microsoft Word 2007 or later, PleaseReview has an optional Word plugin which makes it possible to create a standard review directly from the Word document. If the Word plugin is installed, there will be a PleaseReview ribbon button in Word:
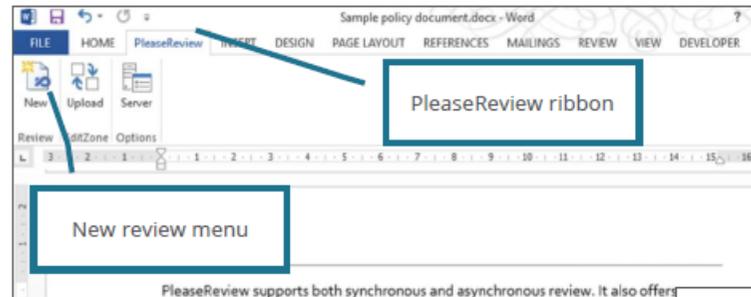
Select the 'New Review' menu option. If the document has not been saved you will be prompted to save it.

If you have more than one PleaseReview server configured, select the correct one from the drop down list. Enter your PleaseReview password then click 'OK'.

Your default browser will open at 'step 1' of the new review wizard with the 'Standard' review type pre-selected. The review title will be pre-populated with 'Review of *document name'* (up to 128 characters).

At step 2 the document will already have been uploaded (the document will be closed in Word).

You can drag and drop more documents into the review or use the upload dialog box to add more documents to the review if required. The rest of the review creation can be completed in the usual way.

new review step 2: upload documents

documents already attached to this review:

TITLE	TYPE	STATUS	
↕ ▣ Sample policy document.docx	Review ⌄	Successful	✖

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

Document is already uploaded

Advanced Options

Previous   Next
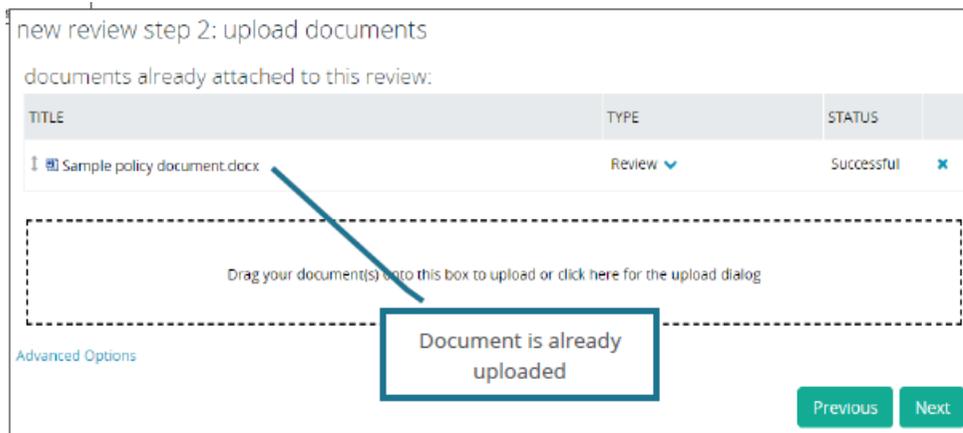
Notes:

- The Word plugin supports all Word document formats, including .rtf, .docm, .dot, .dotx, .dotm;

- When using the word plugin to create a review from a OneDrive folder you must disable 'File Collaboration'. Steps on how to do this can be found here.

- By default, the 'Standard' review type is selected when creating a review using the Word plugin, this can be changed at the next step of the new review wizard (Not applicable to Veeva-centric mode, refer to PleaseReview User Manual for Review Types).

Zones

Zones are areas of a Word document which the review Owner can set up to assign different Reviewer and/or Contributor permissions to different users in the review (previously referred to as 'ReviewZones' and 'EditZones').

Zones allow the review Owner to determine different review permissions for specific zones of a document, for example to prevent individual users from commenting or marking-up changes to specific zones, or even prevent users from viewing certain zones of the document. It also provides a very powerful capability that allows different zones to be authored, using Microsoft Word itself, in parallel, and then for each zone to be released for review once it is available.

PleaseReview has an optional Microsoft Word plugin which may be used in conjunction with zones to create a seamless editing experience. However, there is a 'zero footprint' option and the Word plugin is not mandatory. This guide covers using zones both with and without the Word plugin.

Notes:

- Zones are applicable to Word documents only;
- Zones can be created and edited by the review Owner whilst the review status is 'Not Started';
- Zones can only be used by Reviewers and Contributors whilst the review status is 'In Progress';
- The review Owner and any Authors; Author-Contributors or Super-Contributors can continue to use zones whilst the review status is 'Closed'

Enabling Zones

Zones are areas of a Word document which the review Owner can set up to assign different 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.

The 'Zones Options' are available at the bottom of the 'Advanced Options' tab.

To enable Zones, press the 'Preview / Zones' check box. It is then possible to 'Make read only for everyone' or set document permissions on a participant basis. See Zones for more information.

Step 5. Review Summary

The final step is to start the review or put it on hold using the options at the top of the Review Summary screen:

'Put Review on Hold' will allow the review to be started at a later date from the PleaseReview Inbox.
'Start Review' will start the review and an Active workflow is created, a relevant Vault task created for each participant invited to the review:

Notes:

- Any Microsoft Word and Excel documents added to a review are automatically checked out of the Vault by default. Other document formats are, by default, copied and not checked out;

- If the summary screen is closed without selecting 'Start Review', it will be on hold and can be started from the PleaseReview Inbox;

- If the updated document status is not visible on screen, it may be necessary to refresh the page;

- If a document contains Microsoft Word comments or tracked changes, see Uploading a Document with Existing Tracked Changes (Refer to PleaseReview User Manual)

- If a Microsoft Word document contains citations, see Uploading a Document with Citations (Refer to PleaseReview User Manual)

- If a Microsoft Word document contains content controls, see Uploading a Document with Content Controls (Refer to PleaseReview User Manual)

- If a Microsoft Word document is a Transcelerate template, see Uploading Transcelerate Templates (Refer to PleaseReview User Manual)

- If a PDF file contains existing PDF annotations, see Uploading a PDF with Existing Annotations (Refer to PleaseReview User Manual)

Creating Zones

After clicking the 'Preview' link at step 5 of the new review wizard, the document for review will open in 'Preview' mode. Alternatively, the review Owner can start the review and enter the review in the usual way to create zones.

In the review interface, click the 'switch to zone creation mode' icon (▤) to begin creating the zones:
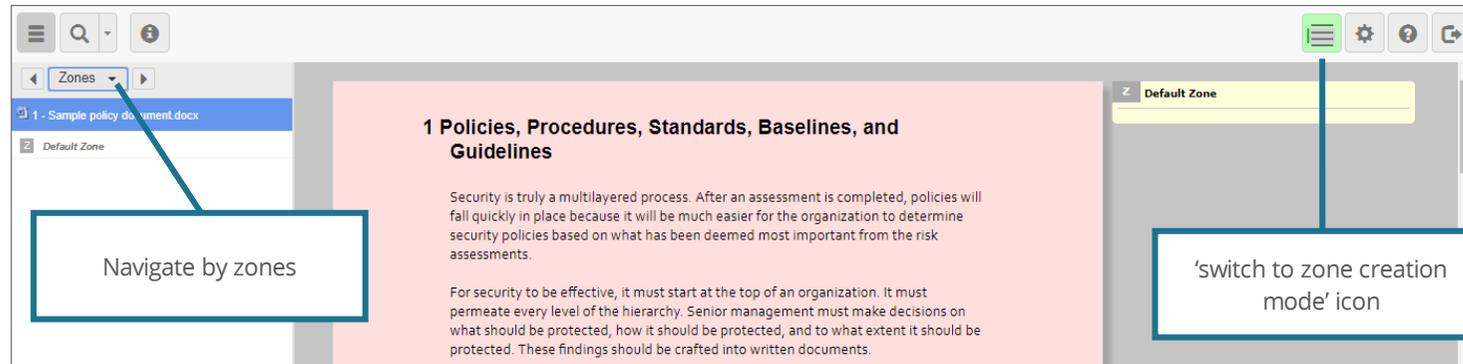
When in 'zone creation mode', the document will display in red and no reviewing icons are displayed on the toolbar (e.g. general comment; reporting; accept/close icons). Note, if there are existing comments/changes in the review, the comment boxes to the right of the document will not display.

To set the first zone, click the paragraph where the zone should start. Press the Shift key on your keyboard and click the paragraph where the zone should end.

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

The zone title is pre-populated from the document's contents and may be over-typed, and you can also add an optional description. The zone permissions for each participant can be set and the permission for any future participants added to the review can also be defined.

Notes:

- The 'switch to zone creation mode' icon is available to the review Owner, and any Super-Contributors in the review;
- Zones may not overlap and must be on discrete parts of the document;
- An entire table can be included in a zone. You cannot select part of a table;
- You cannot start or end a zone inside a header or footer, unless they are both inside the same header/footer;

- If a participant is added to the review after it has started, the permissions granted will be based on the 'New participant zone role' for each zone and/or the default zone;
- One or more Contributors may be assigned to each zone. If multiple Contributors have been assigned the same zone, only one Contributor can download it to Word at a time (see Downloading a Zone).

Zone Permissions

The zone permissions available for each participant is dependent on their role in the review and your system configuration settings:

Permission		Effect
H	Hidden	Unable to see this zone.
V	Viewer	Read-only access to this zone.
R	Reply Only	Can only reply to comments/changes (if enabled by system configuration).
C	Comment Only	Can only add comments (if enabled by system configuration).
P	Propose Change Only	Can only add proposed changes (If enabled by system configuration).
R	Reviewer	Can add comments/proposed changes as normal.
A	Author	Can accept/close comments on this zone.
W	Edit in Word	Can edit the zone by downloading to Word. Only available to participants with a role containing 'Contributor'.

Note: Hovering over a checkbox / radio button will display further information about the permission.

Once created, zones are visible in the navigation pane when navigating by 'Zones'. Any zone assigned for editing in Word will show the assigned Contributor(s) name (see Using Zones). All sections of the document not in a specific zone will be included in the Default Zone (see Setting the Default Zone).

Assigning Zones as a Super-Contributor

A Super-Contributor can assign a zone to themselves but they cannot assign zones to anyone else (see Downloading a Zone as a Super-Contributor).

Automatic Selection Rules for Zones

When creating zones, PleaseReview will use an automatic 'smart selection' of content based on where the zone starts. If the start paragraph is a Word heading level, all paragraphs to the next same level heading will be automatically selected. For example, if you select a level 1 heading, the selection will automatically include everything to the next level 1 heading. To override the automatic selection, press the Shift key on your keyboard and click the paragraph where you would like the zone to end.

Zones and Delegation

If a review participant uses **Simple Delegation** (Refer to PleaseReview User Manual) 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 zone permissions transferred to them. This applies even if the original participant had downloaded a zone before delegating.

If a review participant uses **Managerial Delegation** (Refer to PleaseReview User Manual) to add new participants to a review, all new participants will be assigned permissions based on the 'New participant zone role'. In this instance the Delegator also remains on the review and retains any existing zone permissions assigned to them.

Setting the Default Zone

When in 'zone creation mode', a 'Default Zone' comment box will appear automatically to the right of the document.
The Default Zone enables the review Owner to set the default <u>review</u> permissions which will apply to all sections of the document not in a specified zone:
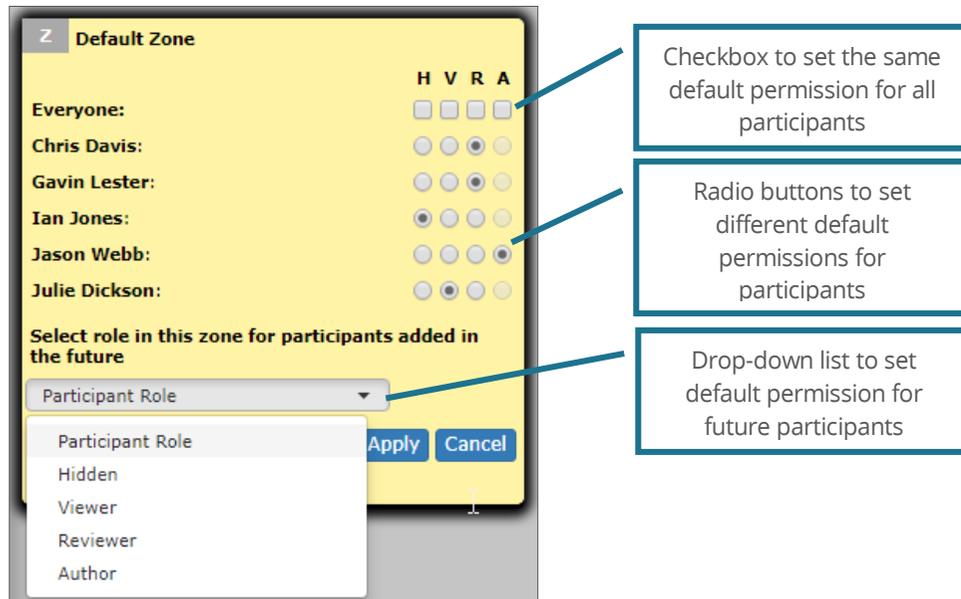
Checkbox to set the same default permission for all participants

Radio buttons to set different default permissions for participants

Drop-down list to set default permission for future participants

You have the choice to set the same default permission to all participants using the checkboxes at the top of the comment box or use the radio buttons to set different default permissions for different participants. Note that Contributor permissions are not included in the Default Zone options.

At the bottom of the comment box, you set the default permission for any future participants added to the review.

Note: If you do not edit the Default Zone, each participant in the review will automatically have permissions based on the participant role assigned when setting up a review.

Once all permissions have been applied to the default zone, click 'Apply'.

Managing Zones

The review Owner has full control over zones. They can add, edit or delete zones at any time and can also reset and complete zones assigned to other Contributors.

The ability to add, edit or delete zones is available to the review Owner when in 'zone creation mode'. To delete a zone, simply select 'Delete' from the actions drop-down list in the top right-hand corner of the comment box. To change the range of a zone, or change participant permissions, click 'Edit'. The comment box will enable editing with all options available when setting zones:

'Delete' and 'Edit' options to manage zones
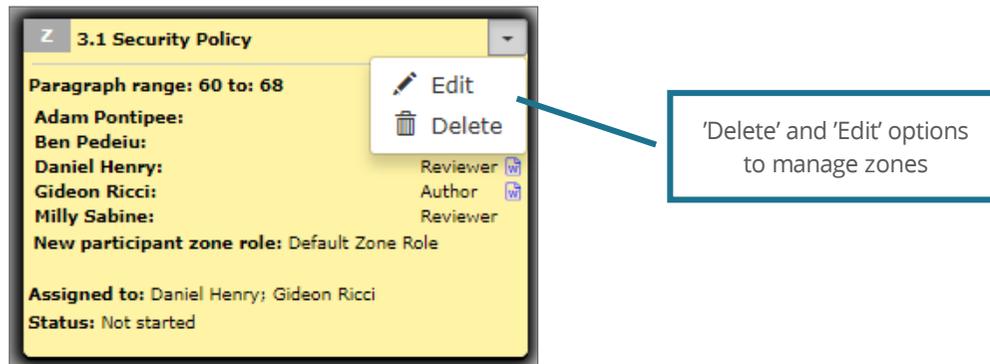
If a Contributor has downloaded a zone but has not uploaded it back into the review, it is possible for the review Owner to reset the zone using the 'Reset' option from the actions drop-down list. Resetting the zone will revert it back to the position before the download. Thus, it will make the zone available for review and any 'saves' the Contributor has made in the meantime will be lost.
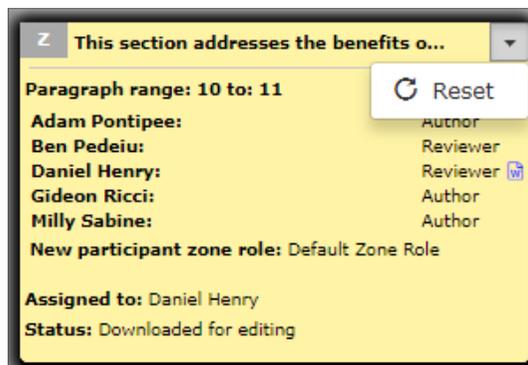
To reset the beginning point of a zone, delete the entire zone and start again by clicking on the new start paragraph.

The options to reset and complete a zone assigned to other Contributors is dependent on the Contributor's status in respect of the zone. For example, once a Contributor has published a zone as read-only, the review Owner has the option to 'Allow comments' on the zone (see Zone Upload Actions for more information).

A full history of activity on zones with Edit-in-Word permissions is available on the Review Control Panel which lists each activity and allows you to view the document and the reconciliation report as it existed prior to each activity (see Document History).

Document History

A full history of activity on zones with Edit-in-Word permissions is available to all participants in the review from the Review Control Panel. The 'Zone History' screen lists each activity and allows you to view the document and the reconciliation report as it existed after each activity:

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.

Note, when a zone is edited, all comments and proposed changes made on the zone are 'lost' and will not be carried forward when the revised zone is published. To ascertain the comments and proposed changes which existed on the zone prior to its download and revision, view the history report.

The Review Environment

This section relates to the PleaseReview interface, the default interface for Microsoft Word and PDF documents. All other document formats are presented in the PleaseReview classic interface (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.

Toolbar

Navigation   Document Actions   User

Navigation

Icon	Description
	Show/hide the navigation pane.
	The navigation drop-down box allows you to select whether navigation is by Contents, Comments, Mentions, Zones or Find (search). A PDF document allows navigation by Bookmarks, Comments, Mentions or Find. 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). The navigation pane will also show a list of all documents in the review. To select other documents in the list (if any) click on their title.
	Navigates to the next/previous document. Do not display if there is no document before/after the current document.
	'Find' opens search tool in the navigation pane. This allows you to search for specific words or phrases. 'Find and Replace' allows you to search for specific words or phrases in Word documents. 'Find and Redact' allows you to search and redact specific words or phrases in PDF documents. 'Find Options' allows you to make the search exclude comments and open changes; case sensitive; accent sensitive; or carry out an advanced search.

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** (Refer to PleaseReview User Manual).
	Linked review (if available). See **Document Comparison and Review Linking** (Refer to PleaseReview User Manual).
	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.
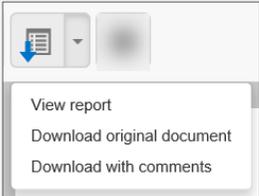
Icon	Description
	'Default' shows all comments and changes with no filter applied.
	'Open' shows only open comments and changes in the navigation pane and in the document display. **Note**: Accepted changes are still displayed in the document pane so you are working on an up to date document, however the associated comments are not displayed. The icon color will change to green to indicate a filter is applied.
	'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.
	'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.
	'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.
	'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.
	'Accept all' allows you to accept all comments and changes at once. See Accept/Close All.
	'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.
	'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.
	'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.
	'Close all' allows you to close all comments and changes at once. See Accept/Close All.
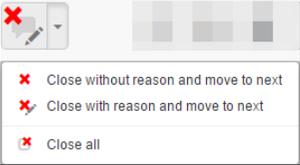
User Actions

Icon	Description
	Switch to zone creation mode – Allows the review Owner to set zones.
	User settings – See Review User Settings.
	Help – Access to the user manual, training movies and other support materials.
	Leave the review – See Leaving the Review and Review Status.

PDF Toolbar

When a PDF document loads in the review interface, an additional PDF toolbar will be made available. **Note:** Annotation tools are system configurable and therefore may not be available.

PDF toolbar
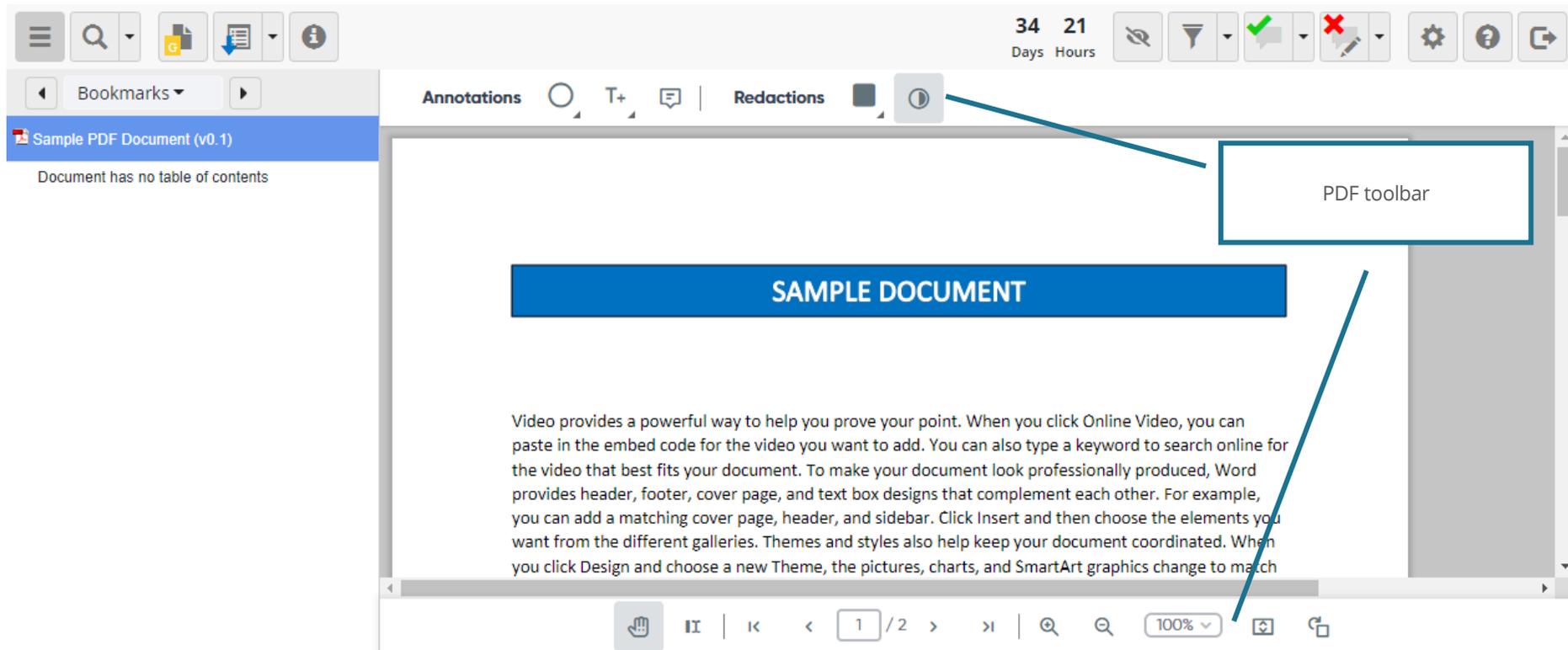
Toolbar Option	Toolbar Detail
Annotation is locked

Annotation is selected

The annotation tools provide the ability to use drawing options, insert, replace, delete, highlight text and make comment.

Click on the icon to select the annotation option. To lock a tool, double click on the icon allowing you to create many annotations of the same type. |
| **Redactions** |
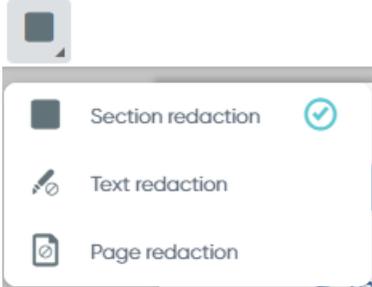
The redaction tools provide the ability to redact a PDF using section, text or page redaction.

Toggle the "View redactions" to hide/show redacted content. |

↻	The rotation tools provide ability to rotate the document in clockwise or anti-clockwise.
🖐	As move tool
I	The selection tool provides ability to select text from PDF.
⬍	Page fit tool resizes the document to fit the viewer window.
🔍 🔍 100% ▾	The zoom tool is available to change the document zoom level.
‹‹ ‹ 1 / 2 › ››	The page navigation tools are available at the bottom of the review pane.

Custom Filter

'Custom filter' allows you to display a customized selection of comments in a review.
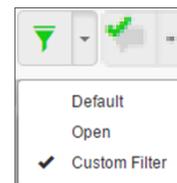
Selecting the custom filter option opens a new window which allows you to select which comments are displayed.

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

Review User Settings

The PleaseReview 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 review environment and allow you to change your personal preferences, your default Workgroup, and your password (if permitted):
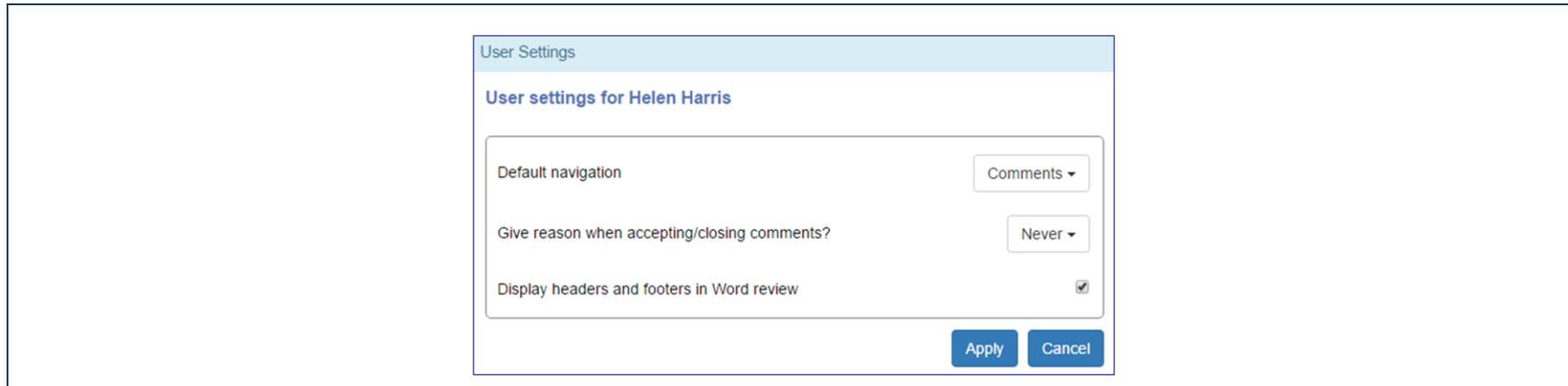
User Setting	Description
Default navigation	The default view of the navigation pane.
Give reason when accepting/closing comments?	This option is only relevant to Authors. Never – Authors can accept/close comments with one click. Close only – Authors are only prompted for a reason when closing comments 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.

The Review Environment in the Classic Interface

This section relates to the PleaseReview classic interface which is used for all document formats other than Microsoft Word and PDF. By default, all reviews of Microsoft Word and PDF documents are presented in the PleaseReview interface (refer to The Review Environment).

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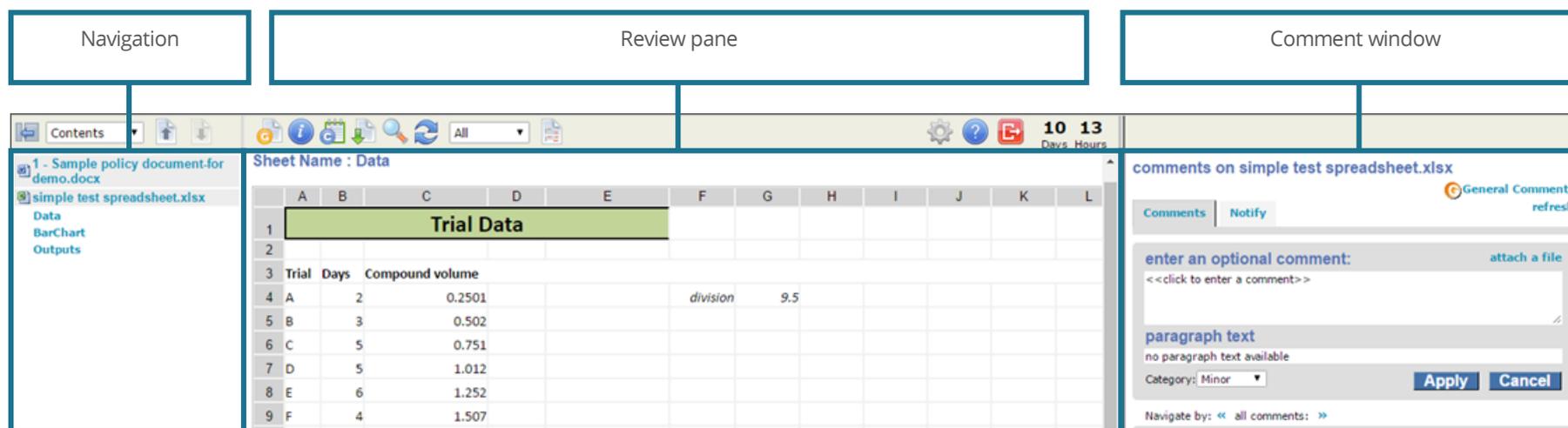
There is a toolbar across the top of the window which provides functions required for user interaction.

Toolbar
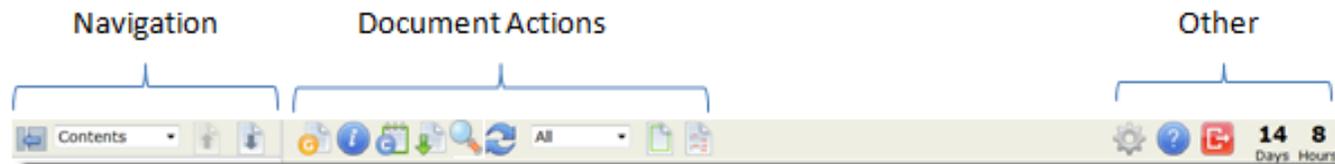
Navigation

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', or 'Bookmarks'.
	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

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.
	Refreshes the document. This will re-load the document and all comments from the server.
All ▼	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.
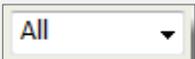
Other Actions

Icon	Description
⚙	User settings. See **User Settings** (Refer to PleaseReview User Manual).
❓	Help – Access to the user manual, training movies and other support materials.
⏏	Leave the review. See <u>Leaving the Review and Review Status</u>.
22 8 Days Hours	Displays the time remaining until the end of the review.

View Options

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

Document Type	Normal View	Layout View
Excel	N/A	Layout view displays one worksheet at a time. The navigation pane lists each worksheet.
PowerPoint	Displays all slides with slide notes below each slide. Navigation pane displays all slides by title.	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.
Plain Text	Displays the document.	Layout view provides a split screen option which enables the Reviewer to navigate to two different places in the same document at once. 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.
Image Collection	Normal view displays all images on the same page with a separator between them.	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.

Tracked Changes Options

There are two view options for displaying tracked changes/mark up in the document: 'Tracked Changes (Open)' and 'Tracked Changes (Accepted)'. Note, these options are only available for Excel documents.

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

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	☐ All ☐ Closed ☐ Merged ☑ Accepted ☑ Open
Type of comment	☑ All ☑ General ☑ Comment ☑ Proposed Change
Comment category	☑ All ☑ Minor ☑ Typo ☑ Major ☑ Cosmetic ☑ <Blank>
Participant	☑ All ☑ June Tang ☑ Nisha Rani Thiyagarajan ◉ Made a comment ☑ Soleha Abdullah ○ Participated in discussion ☑ User1 Test

Date	◉ All
	○ Since I [entered the review 13 Dec 2021 10:00 AM ▾]
	○ Since:
	    date :
	    time : [00 ▾] [00 ▾]
	<table><tr><td colspan="7">< December 2021 ></td></tr><tr><td>SUN</td><td>MON</td><td>TUE</td><td>WED</td><td>THU</td><td>FRI</td><td>SAT</td></tr><tr><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td></tr><tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr><tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr><tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td>1</td></tr><tr><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr></table>

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

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 : [00 ▾] [00 ▾]

<	December 2021	>

SUN	MON	TUE	WED	THU	FRI	SAT
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	7	8

○ Comments only

☐ Include Paragraph IDs

☐ Clean download - removes Word "metadata" and previous tracked changes

☐ Debugging options

[Return to default]

[Ok] [Cancel]

Reviewing Documents

This section relates to reviewing documents in the PleaseReview web interface, the default interface for Microsoft Word and PDF documents. All other document formats are presented in 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 (to see **User Settings** refer to PleaseReview User Manual).

Reviewing Word

Adding Comments and Proposed Changes

Comments and proposed 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:

Click on the text to add a proposed change inline

Comments can be entered here

Categorize comment/change

1 Policies, Procedures, Standards, Baselines, and Guidelines

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.

Enter your comment here...

Minor   00000003   Apply   Cancel

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

Formatting options, attach a file and paragraph history available from this icon

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 and/or proposed change and closes the inline editor. The 'Cancel' button cancels the action and closes the inline editor.

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:

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;
- It is possible to apply multiple proposed changes using the 'Find and Replace' tool (see Find and Replace);
- It is possible for the review Owner to disable the ability to apply proposed changes to a document and the only option will be to add a comment;
- 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.

Inline Editor Options

The icon displaying to the right of the inline editor enables additional options:
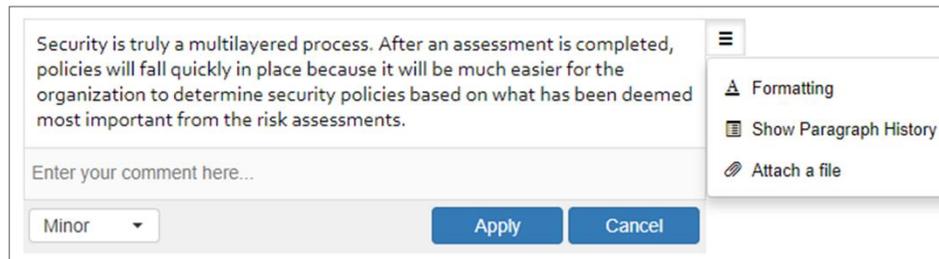
Formatting

To apply formatting changes to text, select 'Formatting' from the ' ☰ ' icon of the inline editor. The formatting toolbar opens:
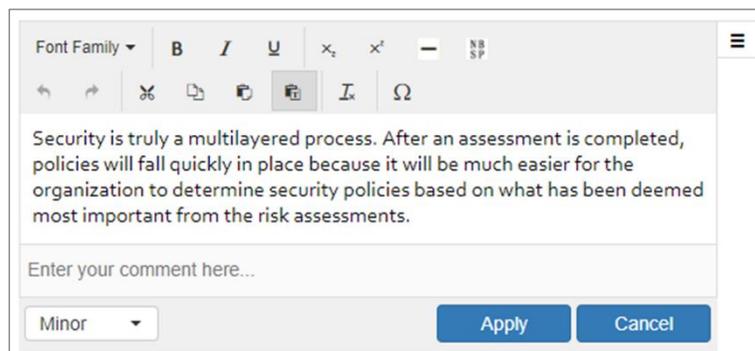
Formatting changes are treated as a proposed change.

Show Paragraph History

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 also available from the actions menu (see Paragraph History).

Attach a File

A file may be attached using the inline editor – there is no need to enter any comments or proposed changes to attach a file.

To attach a file, select 'Attach a file' from the '≡' icon of the inline editor. The browse option opens allowing a file to be selected.

Once applied the attached file is displayed in the comment box to the right of the document:
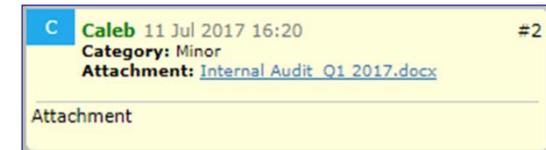
Comment Categorization

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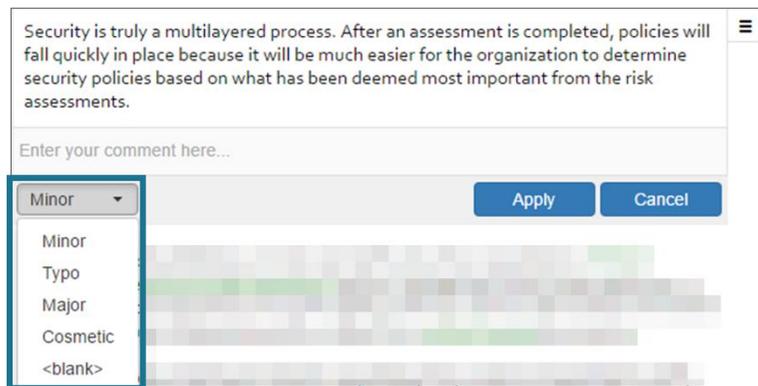
Notes:

- Comment categories are system configurable and therefore may not be present or the list displayed may be specific to your system;
- There can be multiple levels of sub-categories configured (for example, Typo/Spelling; Typo/Grammar and so on);
- Comment categories can be edited/added by your System Administrator;
- Comment categories can be mandatory. If so, comments/changes cannot be applied until a category has been selected.

Features Presented in the Classic Interface Only

Feedback documents will be presented in the classic interface only.

Reviewing PDF

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

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, a comment category to be applied, and a file to be attached (if required):
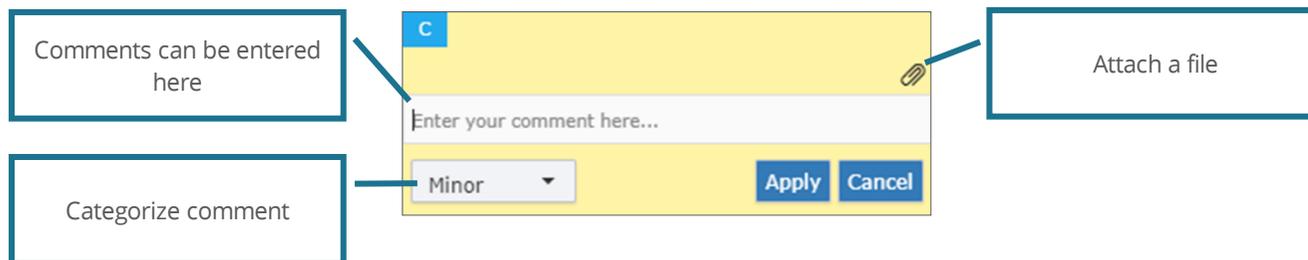
Below is an example of the sticky note tool being used to add a comment:
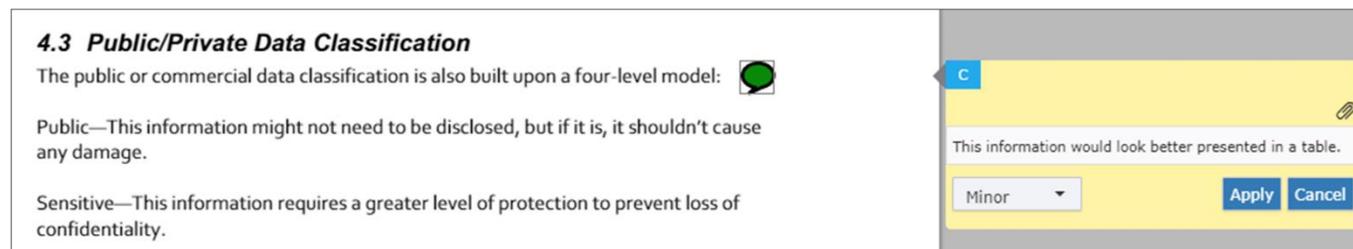
Making Proposed Changes to a PDF

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:

Proposed change type automatically populated based on tool used		Attach a file

Categorize change		Optional comment can be entered here
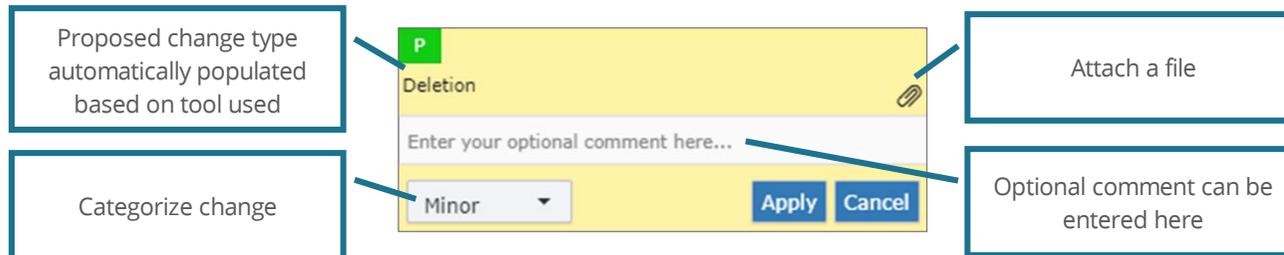
Below is an example of the delete text tool used to add a proposed change:
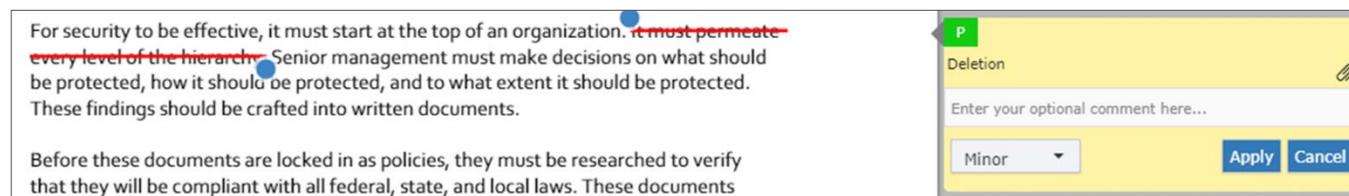
Notes:

- It is possible to apply multiple proposed changes using the 'Find and Replace' tool (see Find and Replace).

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, optional comment text can be added, a file can be attached (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:
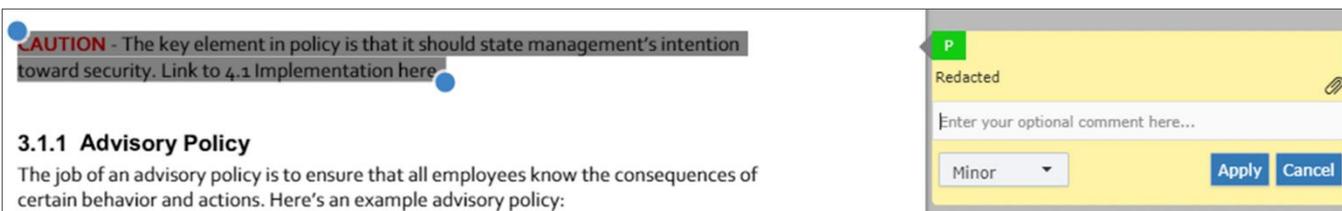
To display redacted content, click the 'Redaction View Mode' icon (👁) on the 'Redact' section of the toolbar.

Notes:

- It is possible to apply multiple redactions using the 'Find and Redact' tool (see Find and Redact).

Attach a File

A file may be attached to a comment, proposed change or proposed redaction.

To attach a file, select the paperclip icon (📎) in the comment box when applying a comment/change/redaction.

The browse option opens allowing a file to be selected. Once applied the attached file is displayed in the comment box to the right of the document.

In the document download, attachments are displayed as an icon for the relevant file type and can be opened by simply double-clicking the icon from within Word.

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:

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.

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

Importing PDF Annotations

PDF annotations including review annotations, mark up, redactions, etc. can be imported into a review which PleaseReview will convert 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
Assessments.pdf	0	0	0	0	0

Status | Download copy | Notify | Delegate | Copy Email | **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	●
Assessments.pdf	○

PDF documents in the review

Select PDF file to import annotations to

COMMENT CATEGORY	Minor ▾
FILE	Choose File No file chosen
	Upload

Select comment category

Browse for PDF to be imported, then click '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:

Number of annotations imported

Number of successful imports: 5
Number of substituted imports: 0
Number of failed imports: 0

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.

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:

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.
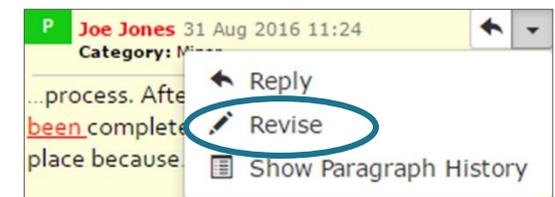
Replying to Comments and Changes

To start, or contribute to a discussion thread, it is possible to use the 'Reply' option from the actions menu icon (⊞) or the quick reply icon (↰) which appears in the top right corner of a comment/proposed change when you hover over the comment/proposed change.

Clicking the 'Reply' option from the actions menu or the quick reply icon on a comment or proposed change will open a comment area where text can be entered.

Once applied, the reply will display as a discussion thread:
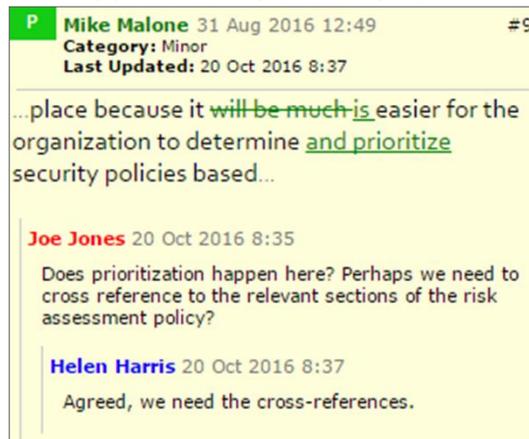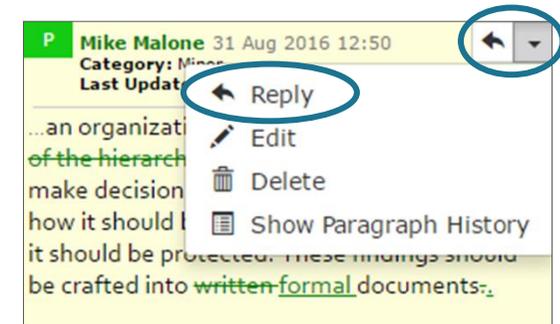
Notes:

- Once a comment/proposed change is 'Accepted', 'Closed' or 'Withdrawn', no further discussions are possible, and the 'Reply' option will not be available;

- All discussion threads are recorded in the reconciliation report (see The Reconciliation Report for more information);

- Discussion threads on comments/proposed changes in PDF documents will display at the same level in the document download. This is because annotations in PDF documents cannot display nested or multi-level replies;

- If the comment box is minimized, the number of replies will be identified.
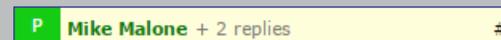
Paragraph History

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:

Original paragraph text

All comments, changes and related discussion threads display

Apply filter using settings in review interface

Turn on/off tracked changes

Agree / Disagree

Participants have the option to agree or disagree with comments and proposed changes in a review.

An agree icon ( ) and a disagree icon ( ) is available in all comment boxes displaying to the right of the document in the review interface:
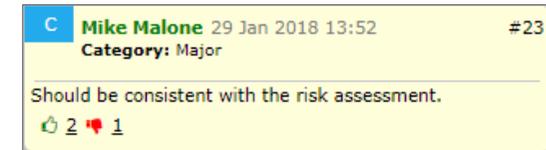
To agree to a comment or proposed change, click the green 'thumbs up' icon. Click the red 'thumbs down' icon to disagree with the comment/change. Once clicked, the icon will show in full color (e.g. after clicking the icon, it will display as). To cancel a vote, click the icon again.

To see a list of participants that have agree/disagreed to a comment/proposed change, click the number that appears next to the agree/disagree icon. A pop-up message will display the information across three tabs to show a list of all participants that have agreed; a list that have disagreed; and a full list of all agree/disagree votes:
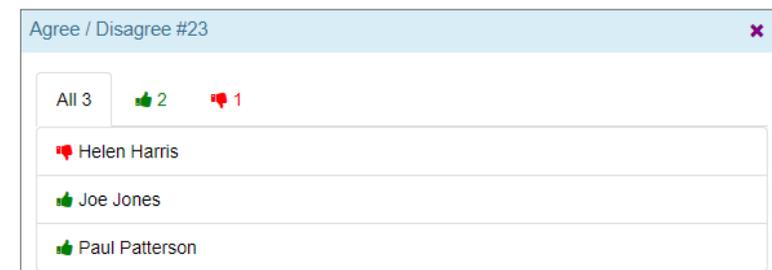
Notes:

- It is only possible to agree/disagree with open comments/changes (once accepted or closed, the icons will not display);
- The options to agree/disagree are also available in the 'show paragraph history' window;
- A full list of all agree/disagree votes is captured in reconciliation report;
- The agree/disagree feature is not available in the Offline Client.

@Mentions

PleaseReview enables @mentions to be used in comments and discussion threads. This provides the ability to mention participants in the review in a comment or discussion thread and PleaseReview will notify the participant about the comment/discussion via email.

To use @mentions while entering a comment or discussion thread, simply type the '@' symbol followed by the user name to be mentioned. PleaseReview will automatically provide a list of suggested participants in the review matching the text typed:
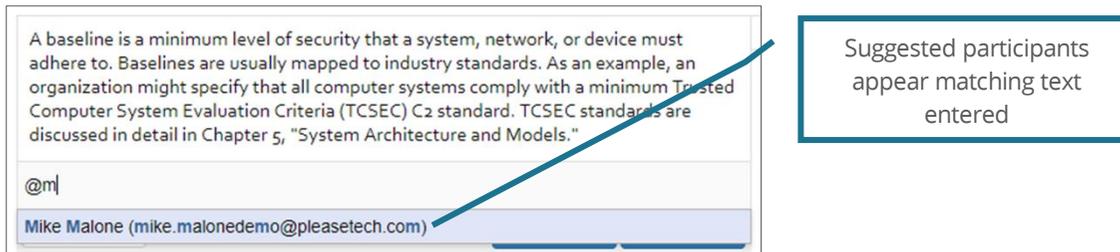
A baseline is a minimum level of security that a system, network, or device must adhere to. Baselines are usually mapped to industry standards. As an example, an organization might specify that all computer systems comply with a minimum Trusted Computer System Evaluation Criteria (TCSEC) C2 standard. TCSEC standards are discussed in detail in Chapter 5, "System Architecture and Models."

@m

Mike Malone (mike.malonedemo@pleasetech.com)

Suggested participants appear matching text entered

Add the @mention by clicking the suggestion or pressing the Enter key.
Once the comment or discussion thread has been applied, an email notification is sent to the participant and their name appears in colored text in the comment information box to the right of the document:

C **Helen Harris** 27 Jul 2017 11:28   #4
Category: Minor
Last Updated: 27 Jul 2017 11:33

Mike Malone can you check this against the network documentation?

Paul Patterson 27 Jul 2017 11:33

Mike Malone, also involve **Joe Jones** from the architecture perspective

Notes:

- Only participants in the review can be mentioned;
- Once a participant has been mentioned in a comment/discussion thread, it is possible to navigate the document by @mentions in the navigation pane (see Navigation);
- If the review is an independent review whereby participants are unable to see each other's' comments and proposed changes, @mentions will not be available;
- Participants in Subteams are only able to use @mentions for the participants within their Subteam;
- All @mentions are recorded in the reconciliation report and the document download.

Find in Review

The Find tool in the PleaseReview review interface allows you to search the content of Word and text-based PDF documents in the review together with associated comments and proposed changes.

Selecting the Find icon (🔍) from the review toolbar opens the text search field at the top of the navigation pane (or you can select 'Find' from the navigation drop-down list). Enter your search text and click the magnifying glass icon or press Enter on your keyboard.

Search results are listed in the navigation pane with the search term highlighted in the results and in the document for ease of viewing:

Count of search results in active document

Search results in document (click to scroll to location)

Search results in comments/changes

Count of search results in other document(s)

Find Options

Selecting 'Find Options' from the Find icon will open additional options to make the search:

(i)   exclude comments and open changes,
(ii)   case sensitive,
(iii)   accent sensitive, and
(iv)   advanced (see Advanced Search).

Find Options

Find In Review

☐ Exclude comments and open changes

☐ Case Sensitive

☐ Accent Sensitive

☐ Advanced Search

Advanced search is a search for text patterns which match parts of a word and includes punctuation in the output. Including punctuation in the search term may give unexpected results unless correctly formatted. We strongly recommend you read the user manual to understand how this works.

Reset   Apply   Cancel

Find and Replace

The Find and Replace tool in the PleaseReview review interface allows you to search and replace text of Word and PDF documents in the review whereby each replacement is treated as a proposed change.

To use the Find and Replace tool, click the drop-down arrow next to the Find icon ( ) on the review toolbar and select 'Find and Replace'. Enter your search text in the field at the top of the navigation pane and click the magnifying glass icon or press Enter on your keyboard to view the search results.

Enter your replacement text in the second field (marked 'replacement text'). You have the option to select specific results or use the 'Select All' checkbox to select all results. Click the replace icon ( ) to replace the result(s) selected:

Select to replace all occurrences listed

Click to replace all selected occurrences

Use checkboxes to select occurrences to be replaced

Search results in comments/changes which cannot be changed (grayed out)

A dialog box opens displaying how many occurrences will be replaced and the number of occurrences which cannot be replaced (if any). You also have the option to leave additional comment text:

Find and Replace

2 selected occurrence(s) out of 6 will be replaced
3 occurrence(s) cannot be replaced

Enter your comment here...

Minor ▾   Apply   Cancel
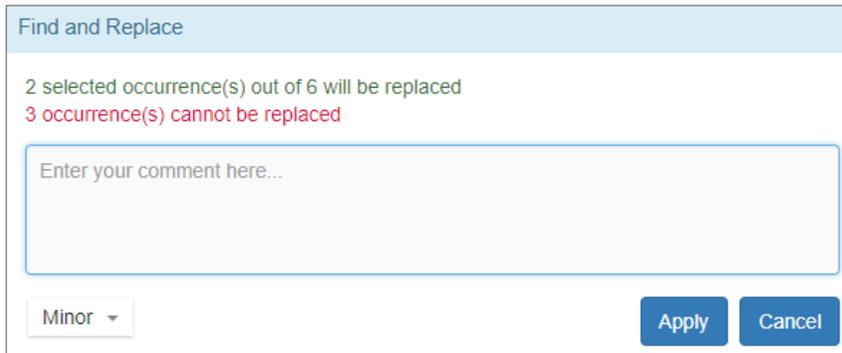
Occurrences that cannot be replaced include any search results from existing comments/changes, any locked fields or content controls and any results within zones for which the participant does not have Reviewer permissions.

Notes:

- The Find and Replace tool works on a word by word basis (i.e. words separated by spaces) and ignores punctuation;
- Each occurrence of the text replaced will be added as a proposed change. Any occurrences in the same paragraph will be grouped;
- Unlike a standard search, the Find and Replace tool can only be used in the active document in the review. Other Word and/or PDF documents are not included in the search results;
- Open or closed comments and changes are not searched;
- Accepted changes are considered part of the document and are therefore included in the search;
- 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. For more information, see Advanced Search;
- Only text for which the participant has permission to make proposed changes will be included in the replacement. Therefore, any results in zones which are locked for editing will be counted in the list of occurrences which cannot be replaced;
- If any locked content controls are included in the search results, they will appear grayed out and cannot be replaced.

Find and Redact

The Find and Redact tool allows you to search and redact text of PDF documents in the review whereby each redaction is treated as a proposed change.

To use the Find and Redact tool, click the drop-down arrow next to the Find icon (🔍) on the review toolbar and select 'Find and Redact'. Enter your search text in the field at the top of the navigation pane and click the magnifying glass icon or press Enter on your keyboard to view the search results.

You have the option to select specific results to redact or use the 'Select All' checkbox to select all results. Click the ➡ icon to apply the redactions to the selected result(s):

Select to redact all results listed

Use checkboxes to select results to be redacted

Search results in comments/changes which cannot be redacted (grayed out)

Find ▾

employee 🔍

Click here to apply redactions ➡

☐ Select All

📕 Classifications.pdf [8]

☐ 1 ...Human Resources the **employee** ombudsman s job ...

☑ 2 ...retain records of **employee** inventions and patents ...

☐ 3 ...want to consider **employee** training without it ...

C 4 Not relevant to the **employee**

☐ 5 ...enforce and control **employee** activity and access ...

☑ 6 ...the screening process **Employee** controls Another useful ...

☐ 7 ...controls Some common **employee** controls include detailed ...

P 8 **Employee**

Click to apply redactions to all selected results

A dialog box opens displaying how many occurrences will be redacted and the number of occurrences which cannot be redacted (if any). You also have the option to leave additional comment text:
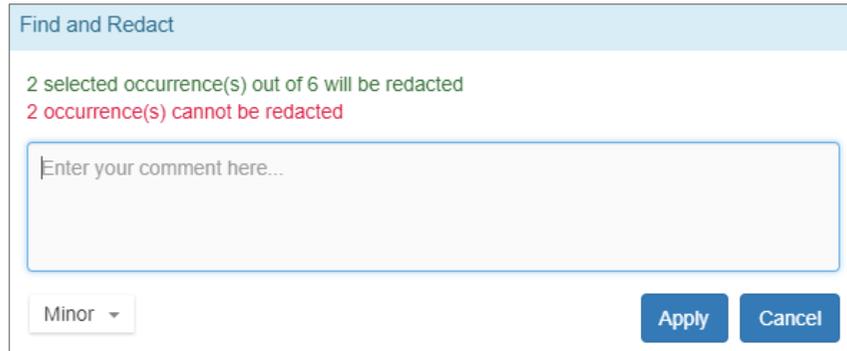
Occurrences that cannot be redacted include any search results from existing comments/changes.

Notes:

- The Find and Redact tool works on a word by word basis (i.e. words separated by spaces) and ignores punctuation;
- Each occurrence of the text redacted will be added as a proposed change either by single line, or by multiple line;
- The Find and Replace tool can only be used in the active PDF document in the review. Other PDF documents are not included in the search results;
- Existing comments and changes are searched but cannot be redacted (regardless of the status of the comment/change);
- 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. For more information, see Advanced Search.

Advanced Search

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. The output also includes punctuation.

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

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;

- For detailed use of regular expressions see www.regular-expressions.info.

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:

All comments and proposed changes display to the right of the document

Different colors for different participants

Icons reflect comments and proposed changes

Icon	Description
C	Open comment (i.e. an Author has not accepted or closed the comment).
G	Open general comment.
P	Open proposed change.
P (with warning)	Conflicting proposed change. Only the latest proposed change is shown in the document.
C✓ **P✓** **G✓**	Accepted comment/proposed change (i.e. an Author has accepted the comment/change).
C✗ **P✗** **G✗**	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 **P** or **C** 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.

Reviewing Documents in the Classic Interface

This section relates to reviewing documents in the PleaseReview classic interface which is used for all document formats other than Microsoft Word and PDF. By default, all reviews of Microsoft Word and PDF documents are presented in the PleaseReview interface (see Reviewing Documents).

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 (to see User Settings refer to PleaseReview User Manual).

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. cell in Excel spreadsheet, location in images), 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 (to see User Settings refer to PleaseReview User Manual).

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:

Enter comment text here

Make proposed changes to text here

Categorize comment/change

Link to attach file

Formatting tools

Click 'Apply' to apply comment or change

Once applied, all comments and proposed changes are recorded in the comment window.

comments on Sample policy document.docx   Paragraph Id 3

Comments   Bookmarks   Notify   refresh

enter an optional comment: attach a file

<<click to enter a comment>>

and/or edit the text of the paragraph below: +

-- Font family --   **B** *I* U x₂ x² — N B S P

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.

Category: Minor   Apply   Cancel

Navigate by: « all comments: »

other comments: ☑ Track Changes

Ⓟ **Proposed change (73) by Daniel Demo on 26 Jul 2016 16:49** Reply Delete Edit
Category : Minor

Security is truly a multilayered process. After an̶ a risk assessment i̶s̶ completed̶complete, 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.

Ⓒ **Comment (72) by Daniel Demo on 26 Jul 2016 16:47** Reply Delete Edit
Category : Major

Daniel Demo (26 Jul 2016 16:47)
We need more information about the risk assessment before this...

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. When set as a popup, 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 'Cancel/Close' button will cancel the action and close the window.

Type	Description
Comments	These are comments on a paragraph or item (i.e. graphic). Comments are entered in the box marked <<click to enter a comment>> Once applied, the comment will be as shown here.
General comments	It is possible to add a general comment to a document using the [toolbar icon] toolbar icon.
Proposed changes	These are proposed changes to the wording of a paragraph. A comment regarding the proposed change can be added if required. To create a proposed change, the text of the paragraph is edited within the text box below the comment box. Once applied, the proposed change will be as shown here: 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. 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. For non text-based documents, the paragraph text box will contain the words 'no paragraph text available' (i.e. proposed changes cannot be made). 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.
Attach a file	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. 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.

Options Available

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

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

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.

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:

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.

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.

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.

Track Changes

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

With track changes selected

Markup is displayed

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

Track changes not selected

No markup displayed

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.

Inline Editing and Paragraph Toolbar

Inline editing, if enabled in your **user settings** (Refer to PleaseReview User Manual), allows you to edit a paragraph directly in the document rather than in the pop-up comment window or in the comment pane.

When you click on a paragraph, an edit area opens inline in the document. Editing the text will create a standard proposed change.

Categorize change

A baseline is a minimum level of security that a system, network, or device must adhere to. Baselines are usually mapped to industry standards. As an example, an organization might specify that all computer systems comply with a minimum Trusted Computer System Evaluation Criteria (TCSEC) C2 standard. TCSEC standards are discussed in detail in Chapter 5, "System Architecture and Models."

Category: Minor

Apply Cancel

Open formatting toolbar

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:

cedures

A procedure is the most specific of security documents. A procedure is a detailed, in-depth, step-by-step document that details exactly w
when my mom sent my wife the secret recipe for a t
by step what needed to be done and how. It even sp
my mom stated was an absolute requirement.
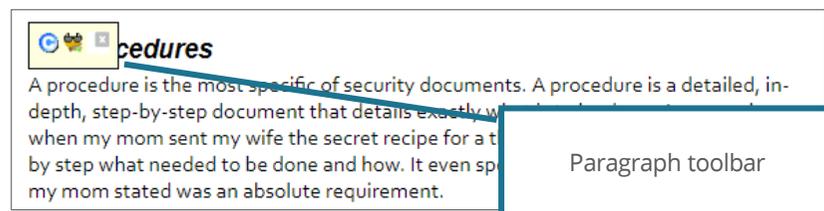
Paragraph toolbar

Clicking 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 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.

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, Bas... Guidelines

Icons reflect comments and proposed changes

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.

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 (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:

For security to be effective, it must start at the top of an organization. It must
p... e... every level of the hierarchy. Senior management must make decisions on
w... ...hat extent it should be
p... ...ents.

Adam Demo 8 Jul 2016 17:10

Reviewer colors in pop-up
match markup color in the
document
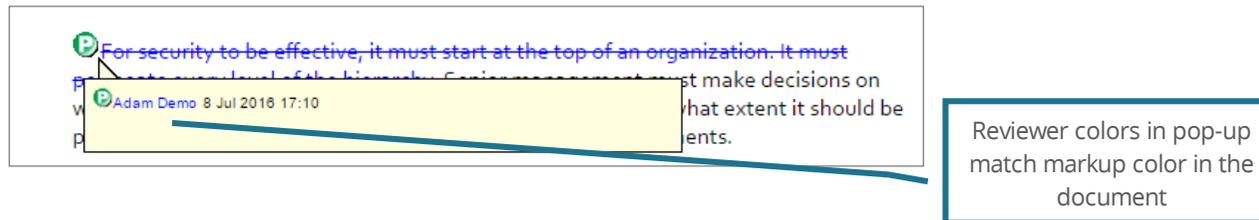
Notes:

- 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 document.

Highlighting Paragraphs

For 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.
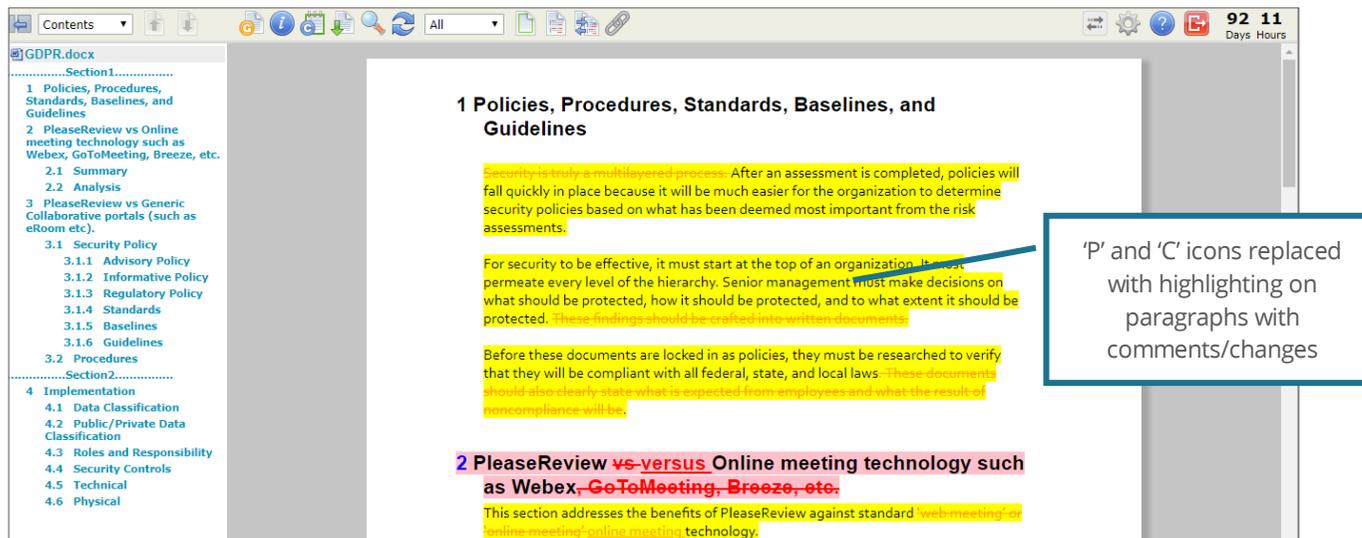
Notes:

- 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.

Refreshing the Document (Auto-Refresh)

Comments and proposed changes are applied as soon as the 'OK' or 'Apply' button has been clicked. However, 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 at a specified time interval.
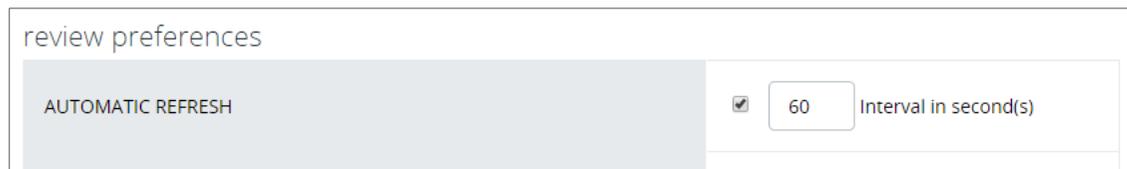
If the box is checked the document will auto-refresh. The default interval (specified by the system configuration settings) is the minimum interval. Therefore, the interval can be made longer but not shorter.

Bookmarks and Personal Notes

The classic review interface 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.
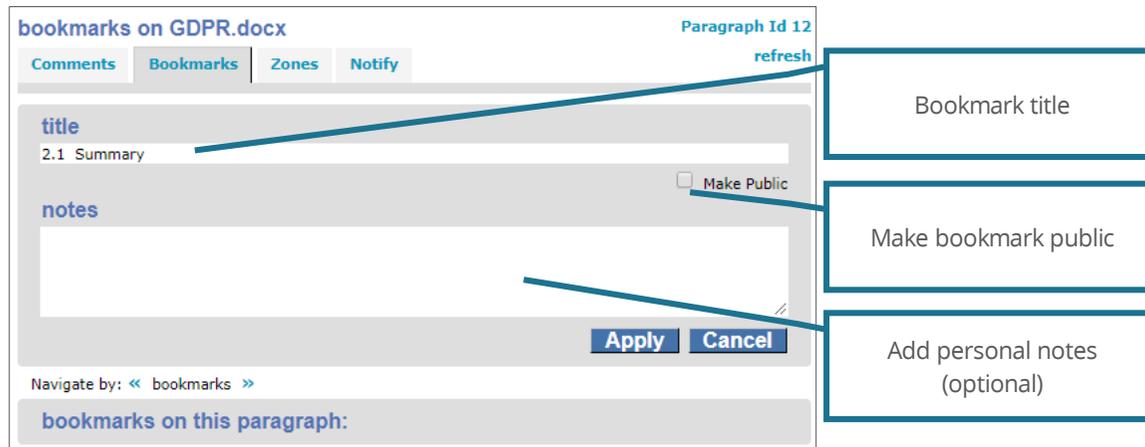
To create a bookmark, select the paragraph by clicking on it and the comment window will open. If browsing by bookmarks, the 'Bookmarks' tab will be at the front. If not, it will need to be selected. The title will be pre-filled with the first 45 characters of the selected paragraph. The title can be over-typed if required. Notes may be added. The 'OK' and 'Apply' options work the same as in the Comments tab.

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

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.

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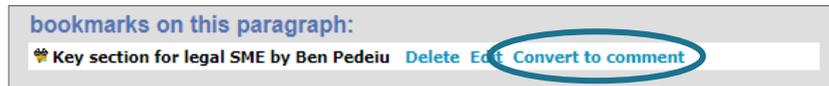
Selecting this will open the 'Comment' tab with the comment pre-filled with the bookmark's notes. This can then be edited. This functionality allows the Reviewer to make private notes on the document as they read it, and then go back and decide whether to convert the notes into comments.

Notify and Review Watching

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.

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.

Reviewing Excel

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

Notes:

- Proposed changes are supported on both formulae and text. 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 zones 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.

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 to be round tripped correctly, otherwise it will be downloaded as an Excel comment;
- Pivot tables are not always drawn correctly.

Reviewing PowerPoint

PowerPoint slides are displayed as images and the image functionality applies. Slide notes are displayed as text and allow comments and proposed changes in the usual way.

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.

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.

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 vhdl, 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.
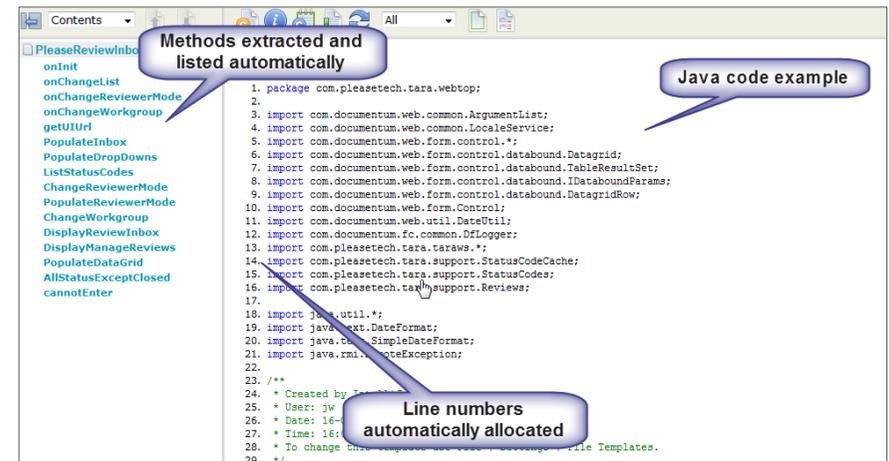
Split Screen View

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.

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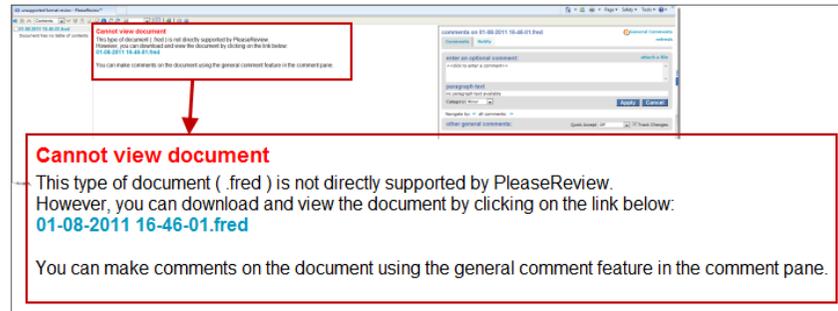
Where the participant is using the pop-up comment window, the general comment window is included in the document view.
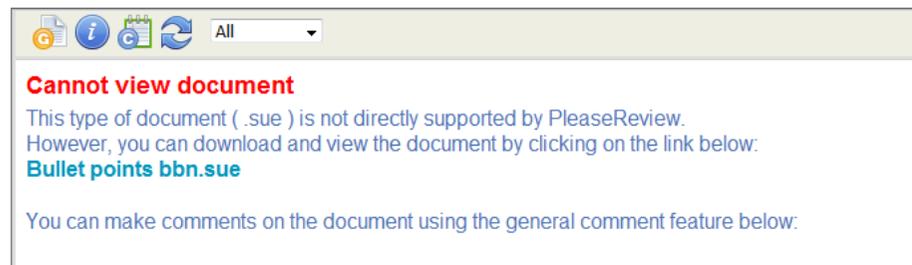
Leaving the Review and Review Status

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:

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

Notes:
• If 'Capacity' is enabled, you will be prompted to enter your capacity in the review using the drop-down list options (see **Capacity**, refer to PleaseReview User Manual);
• If 'Opinion' is enabled, you will be prompted to enter your opinion of the review using the drop-down list options (see **Opinion**, refer to PleaseReview User Manual);
• If 'Time in the Review' is enabled, you will be prompted to enter a value (in minutes) for the time spent in the review (see **Time in the Review**, refer to PleaseReview User Manual).

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'. **Note**: If you leave the review by closing the browser window, your status will be shown as 'In progress'.
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'. This status is set automatically by PleaseReview once you download the review into one of the offline review tools.

Each Reviewer can also set a review 'watch' status:
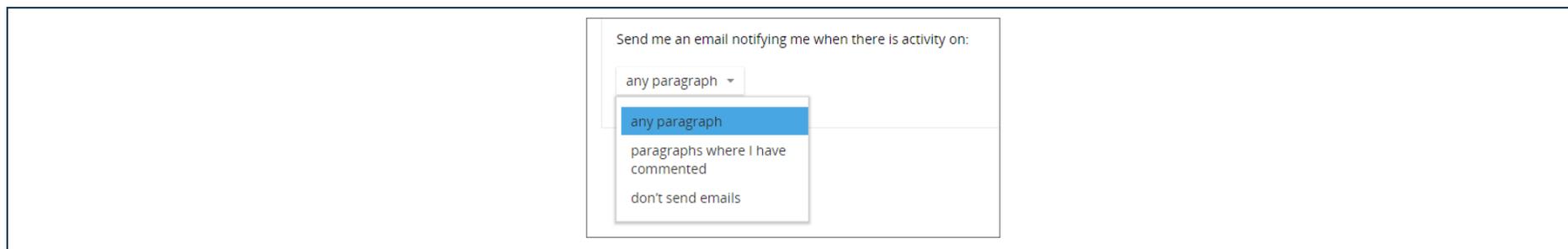
Watch Setting	Description
Any paragraph	An email is sent if there is any activity on the review (i.e. another Reviewer comments anywhere on the document(s) or responds to another Reviewer's comment, or an Author accepts/closes an item).
Paragraphs where I have commented	An email is sent only if there is activity on the paragraphs upon which the Reviewer has commented.
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.

Updating the Workflow

In addition to updating your review status to 'Completed' when you have finished reviewing a document you must also update the associated Workflow to 'Complete'.

This can be done via 'My Tasks' page on the Vault Home tab, click on Continue

Click Continue

On the Vault review page click Complete to mark the workflow as complete.

Important – The review Owner cannot finish the review until all Reviewers have completed their Workflow.

Using Zones

Zones are areas of a Word document which the review Owner can set up to assign different Reviewer and/or Contributor permissions to different users in the review (previously referred to as 'ReviewZones' and 'EditZones').

Zones allow the review Owner to determine different review permissions for specific zones of a document, for example to prevent individual users from commenting or marking-up changes to specific zones, or even prevent users from viewing certain zones of the document. It also provides a very powerful capability that allows different zones to be authored, using Microsoft Word itself, in parallel, and then for each zone to be released for review once it is available.

PleaseReview has an optional Microsoft Word plugin which may be used in conjunction with zones to create a seamless editing experience. However, there is a 'zero foot print' option and the Word plugin is not mandatory. This guide covers using zones both with and without the Word plugin.

Zones are visible in the navigation pane when navigating by zones:
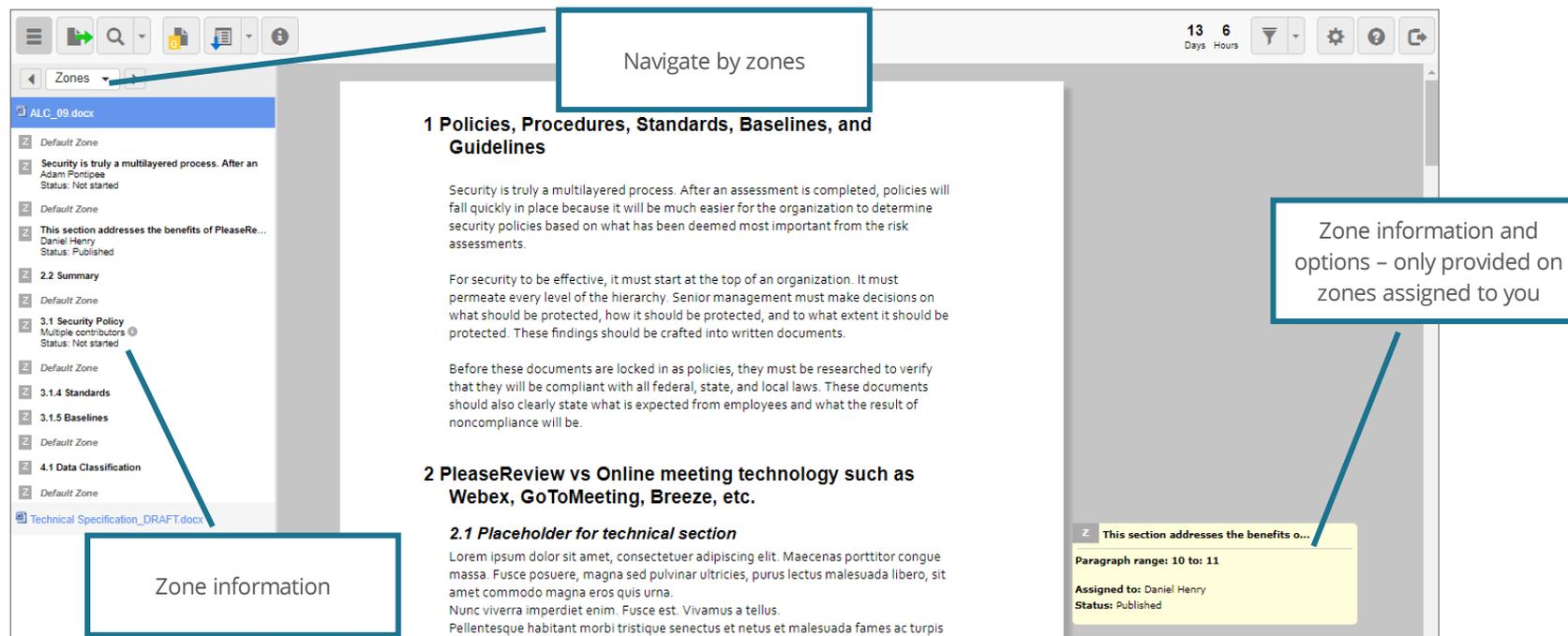
If a zone has been assigned for editing in Word, the information will be displayed in the navigation pane when navigating by zones. This includes the title of the zone (with any optional description), the Contributor(s) to which it is allocated and the current status of the zone. If the zone is assigned to you, you will also see the zone information to the right of the document.
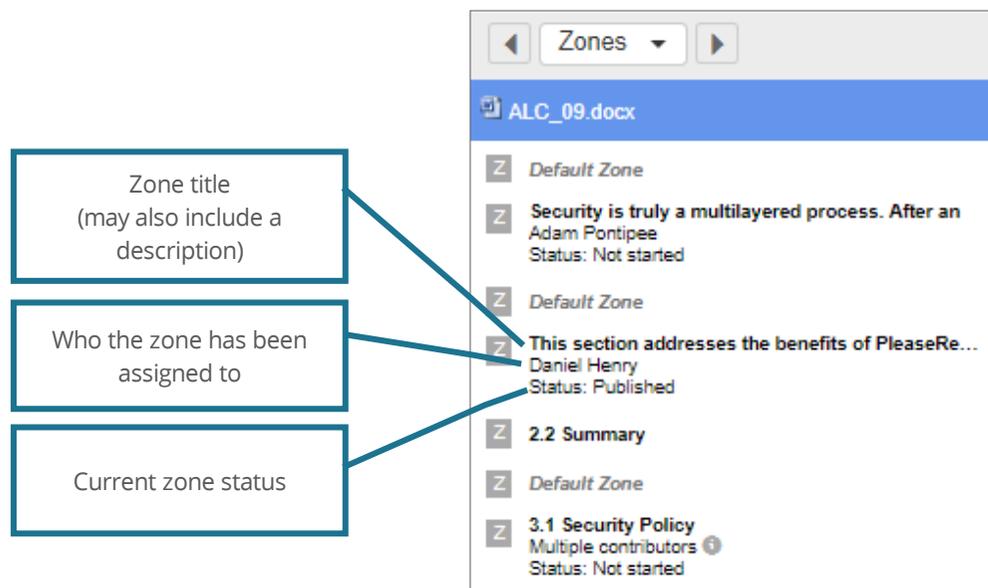
Zone title
(may also include a description)

Who the zone has been assigned to

Current zone status

Adding Comments and Changes to a Zone

If you have made comments and/or proposed changes to a paragraph which has been assigned to a Contributor(s), the comments and changes will be 'lost' once the Contributor revises the zone. The comments and proposed changes will have been available to the Contributor at the point of downloading the zone, but they will not appear in the updated zone.

All comments and proposed changes will be available in the zone history which is available to all participants in the review from the Review Control Panel (see Document History).

Downloading a Zone

As a Contributor you can only download a zone if it is allocated to you. If multiple Contributors have been assigned to the same zone, only one Contributor can download it at a time.

There are two options to download the zone - using the 'Download zone' icon or the 'Download' option from the actions drop-down menu:
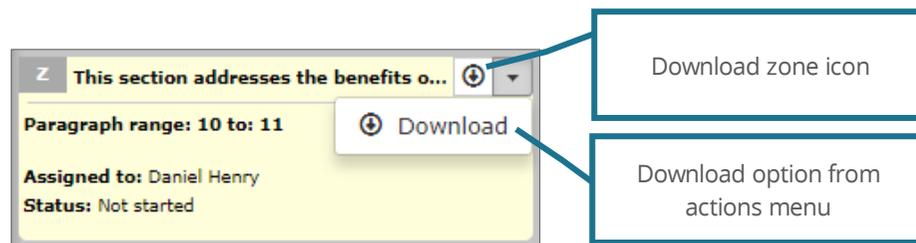
Downloading a zone will download the section of the document set as the zone in Microsoft Word. Whether you choose to open the document directly or save it to a known location, the zone will be downloaded complete with any comments and proposed changes ('Open' and 'Accepted').

Cancelling a Download

To cancel a download, go to the zone actions drop-down menu and select 'Reset'. This will cancel the download and return the zone to the previously published revision:
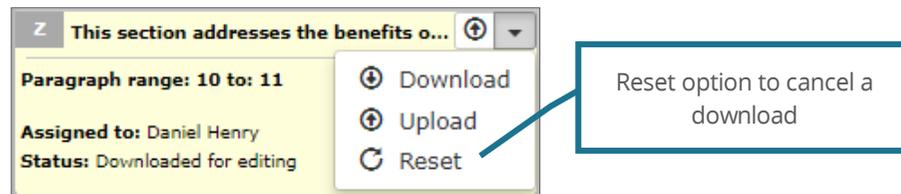
Downloading a Zone as a Super-Contributor

A Super-Contributor has the permissions of an Author and Contributor combined within a review. They can have zones assigned to them by the review Owner, and they are also able to assign zones to themselves anywhere in the document.

To assign a zone to themselves, the Super-Contributor can click the 'switch to zone creation mode' icon (▤) on the PleaseReview toolbar and select any paragraph in the document to assign to themselves. The process for creating the zone is the same as that for the review Owner (see Creating Zones) with the exception that the Super-Contributor cannot assign the zone to anyone other than themselves.

Once downloaded, the paragraph will be 'locked' to other participants, just as for normal zones, until the Super-Contributor uploads it again.

Working with a Downloaded Zone

Once a Contributor has downloaded a zone, 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 zone;
- If your Word document has an OLE Embedded Object (such as a spreadsheet), the object will be available in the downloaded zone. However, any changes to the embedded object will not be saved back when the edited Word document is uploaded to update the zone;
- 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 zone, 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 zones. See Citations and Bibliographies.

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 zone, depending on how the master Word document is constructed.

Scenario	Result
Case 1 The zone does not contain any section breaks	In this case, there will be no headers or footers defined in the zone. 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 zone contains section breaks but no header and footer definitions	In this case all the section breaks inside the zone have all their headers and footers defined as 'same as previous'. When the zone 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 zone 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 zone 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 zone is uploaded, PleaseReview will copy in all the section breaks from the zone 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 zone, and which ones have been added/edited by the Contributor. Implications: • 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 zone, 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 zone (even for the whole document).

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 zone 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 zone 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 zone 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.

Citations and Bibliographies

If zones are applied to a Word document containing citations and bibliographies, a Contributor can download the zone 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:

- If new citations are added in the downloaded zone, 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 zone, they will appear as citations in the master document when the zone 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 zone 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 zone with a bibliography, the new bibliography will appear at the end of the zone. 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 zone. In this case, the newly inserted bibliographies will need to be manually merged with the original bibliography;
- If the downloaded zone 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 zone 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.

Uploading an Updated Zone

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 zone – using the 'upload' option in PleaseReview or via the PleaseReview Word plugin.

In PleaseReview, once a zone has been downloaded, it will refresh to allow additional options, including the option to upload the zone. This can be done using the 'Upload zone' icon or the 'Upload' option from the actions drop-down menu:

Upload zone icon

Upload option from actions menu
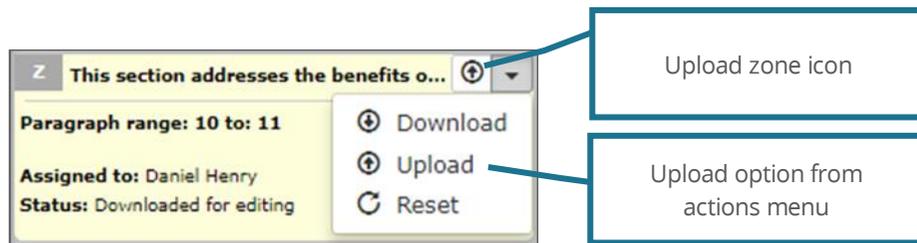
Selecting one of the upload options will open a dialog box allowing you to find and select the revised zone and upload it into the review:
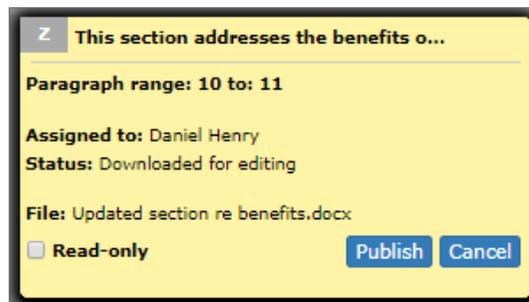
If you have the Word plugin installed, there will be a PleaseReview Upload option in Microsoft Word. Once you have edited the document you can upload it using the plugin:

PleaseReview Upload option in Word
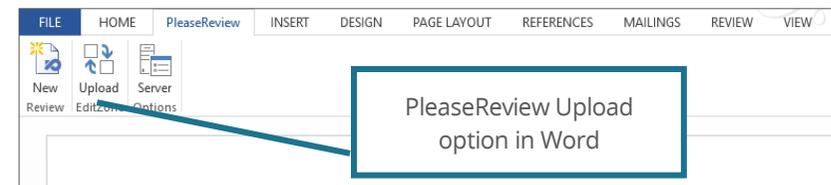
Zone Upload Actions

When uploading a zone back into the review using either the upload options in PleaseReview or the Word plugin, you will have two actions available:

Publish as read-only	Saves the file to the server and updates the zone in PleaseReview. Other participants will see the updated text but will not be able to make comments or proposed changes. The zone will still be available to download and edit again. After this action, you will have the option to 'Allow comments' – which has the same effect as setting the zone to 'Publish' (see below).
Publish	Saves the file to the server and updates the zone in PleaseReview. Other participants will see the updated text and can make comments and proposed changes. The zone will still be available to download and edit again. After this action, you will have the option to 'Make read-only' – which has the same effect as setting the zone to 'Publish as read-only' (see above).

The upload actions are only available to the Contributor who downloaded the zone. Note: the review Owner has the ability to reset a zone, publish a zone as read-only, or publish a zone for commenting at any time.

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;
- The Word plugin supports all Word document formats including .rtf, .docm, .dot, .dotx, .dotm;
- 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 or the version of the Word plugin. For v6.4 and later, it is recommended that you install the latest version of the Word plugin;
- After uploading the revised zone to PleaseReview, will be closed in Microsoft Word.

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 for review Policy review

report generated for Wei Ping Lim on 5 Aug 2019 5:30 PM

summary

Title	Policy review (Id 5117)
Description	
Start Date	17 Jun 2019 5:01 PM
End Date	18 Jun 2019 11:45 PM
Closed Out Date	
Completed Date	
Review Status	Overdue
Total Review Time	0 mins

Review details

review metrics

Project title	Policy rev
Description	Policy review exercise
Project code	1689
Complexity	small

Review metrics details

participants

Name	Status	Role	Capacity	Opinion	Summary	CC	Review Time (mins)	Last Activity
Wei Ping Lim	Review Owner	Owner				8	0	5 Aug 2019 5:28 PM

Participant details

Report download

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 1 - Sample policy document.docx (1 - Sample policy document.docx)

download document with paragraph numbers   download report as word

Document download

Para	Text	T	Comment	S	Author Comment
G	(General Comment)	C	**Comment (6) by Wei Ping Lim on 5 Aug 2019 5:24 PM** *Category : Minor*	O	
			Wei Ping Lim (5 Aug 2019 5:24 PM) Version control		
3.1 Security Policy					
65	Policies are the top tier of formalized security documents. These high-level documents offer a general statement about the organization's assets and what level of protection they should have. Well-written policies should spell out who's responsible for security, what needs to be protected, and what is an acceptable level of risk. They are much like a strategic plan because they outline what should be done but don't specifically dictate how to accomplish the stated goals. Those decisions are left for standards, baselines, and procedures. Security policies can be written to meet advisory, informative, and regulatory needs. Each has a unique role or function.	P	**Proposed Change (9) by Wei Ping Lim on 5 Aug 2019 5:27 PM** *Category : Minor* Policies are the top tier of formalized security documents. These high-level documents offer a general statement about the organization's assets and what level of protection they should have. Well-written policies should spell out who is responsible for security, what needs to be protected, and what is an acceptable level of risk. They are much like a strategic plan because they outline what should be done but ~~don't~~ **do not** specifically dictate how to accomplish the stated goals. Those decisions are left for standards, baselines, and procedures. Security policies can be written to meet advisory, informative, and regulatory needs. Each has a unique role or function.	O	
Link back to review			**Wei Ping Lim (5 Aug 2019 5:27 PM)**		
		P	**Proposed Change (8) by Wei Ping Lim on 5 Aug 2019 5:26 PM** *Category : Minor* Policies are the top tier of formalized security documents. These high-level documents offer a general statement about the organization's assets and what level of protection they should have. Well-written policies should spell out ~~who's~~ **who is** responsible for security, what needs to be protected, and what is an acceptable level of risk. They are much like a strategic plan because	A	**Wei Ping Lim (5 Aug 2019 5:26 PM):** Accepted

Customizing the Report

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

Select comments by:

Document	☑ All ☑ ALC_09docx.docx ☑ Classifications.pdf ☑ Findings presentation.pptx ☑ Complaints log.xlsx
Status	☑ All ☑ Closed ☑ Merged ☑ Accepted ☑ Open
Type of comment	☑ All ☑ General ☑ Comment ☑ Proposed Change
Comment category	☑ All ☑ Minor ☑ Typo ☑ Major ☑ Cosmetic ☑ <blank>
Participant	☑ All ☑ Adam Pontipee ☑ Ben Pedeiu ◉ Made a comment ☑ Daniel Henry ○ Participated in discussion ☑ Gideon Ricci ☑ Harriet Newborn

Date	◉ All
	○ Since I [entered the review 14 Aug 2018 7:22 PM ▼]
	○ Since:
	    date : **< August 2018 >**
	             SUN MON TUE WED THU FRI SAT
	             29 30 31 1 2 3 4
	    time : [00 ▼] [00 ▼] 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 7 8

Show Track Changes	☑ Show Proposed Changes as tracked

[Return to default]

[Ok] [Cancel]

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

Document Formats

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

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.

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)'.

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.

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.

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).

Feedback Document

The reconciliation report for a feedback Document will list each of the Ratings or Bullets that have selections:

The rating record will be processed in the following way:

- If there is one accepted rating, the status is 'A';
- If there is no accepted rating, regardless of whether the paragraph contains 'Ignored' or 'Rejected', the status will be 'O'. A special scenario is where only one rating appears but it is 'Ignored' – this will still have 'O' status.

Accepting and Closing Comments

This section relates to accepting and closing comments and proposed changes in the PleaseReview interface, the default interface for Microsoft Word and PDF documents. All other document formats are presented in 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).

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:
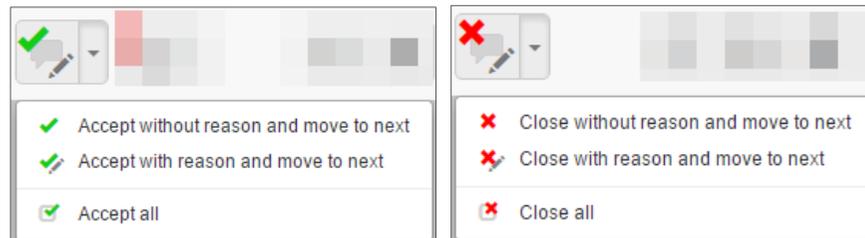
Notes:
• Selecting the 'Accept with reason and move to next' will allow the Author/Owner to accept a comment or change, enter a reason and then move to the next open comment or change in the review;
• Selecting the 'Accept without reason and move to next' will provide a 'one-click' action for accepting 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 changed 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.

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 Review User Settings).
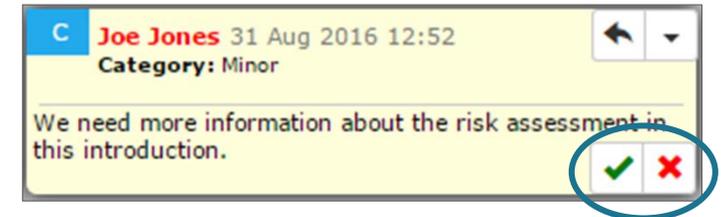
Notes:

- 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 opens allowing the Author/Owner to select a reason from the drop-down list:
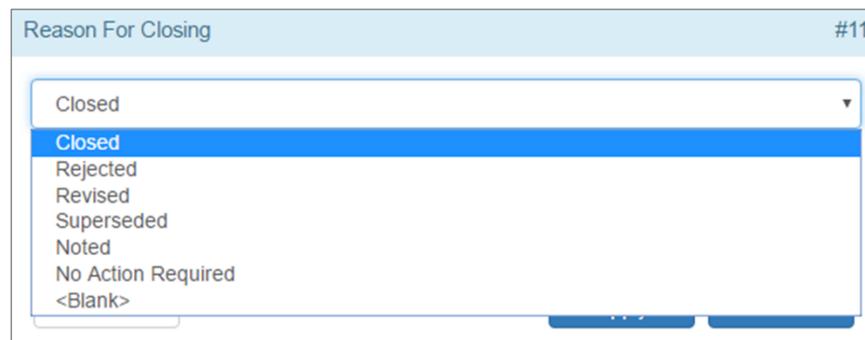
The Author/Owner also has the option to leave additional notes. **Note:** The drop-down list is site-configurable.

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:

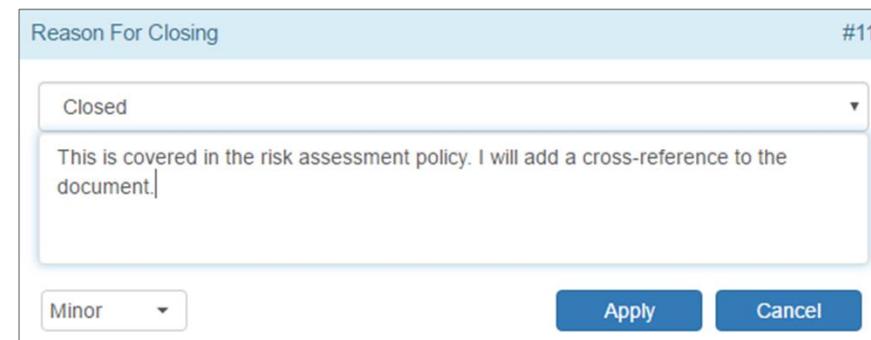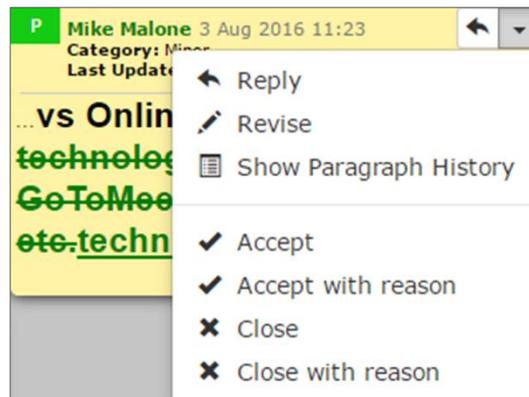Irrespective of the 'Give Reason' setting (see Review User Settings), the Author/Owner can choose whether to accept/close the comment/change either with or without giving a reason.

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 can 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).

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:

Accept All Currently Displayed

7 displayed comments will be accepted

Accept Reason:

Accepted ▾

☐ Change category on all comments: Minor ▾   Apply   Cancel
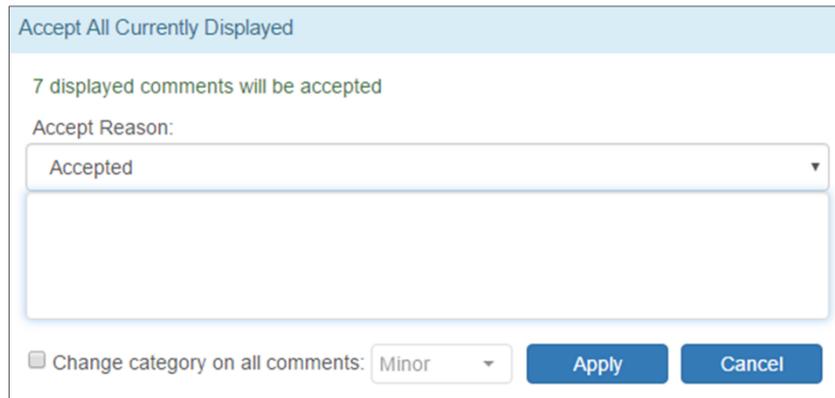
The dialog box displays how many comments and changes are affected.

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.

Accepted/Closed Comments

Once the Author/Owner has accepted/closed comments and proposed changes, the status of the comment/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.

Conflicting Changes (Word Only)

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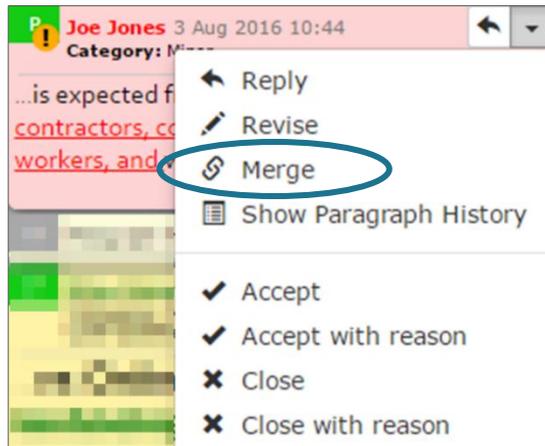
Selecting 'Merge' will open the merge window:

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

| ☑ #16 | P⚠ **Mike Malone** | 19 Oct 2016 14:51 | |

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

| ☐ #15 | P⚠ **Helen Harris** | 19 Oct 2016 14:02 | Conflicts with change #16 |

...is expected from ~~employees~~ all staff and what the...

| ☑ #12 | P **Mike Malone** | 19 Sep 2016 12:56 | |

Before these ~~documents~~ policies are ~~locked in as policies~~finalized, they must...

| ☐ #3 | **Joe Jones** | 3 Aug 2016 10:44 | Conflicts with change #16 |

...is expected from ~~employees~~ employees, contractors, consultants, temporary and other workers, and what the result...

[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":

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:

![Ideagen logo]

Making New Comments or Proposed Changes

If an Author/Owner makes a new comment, proposes a new change or revises as 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:

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.

Accepting and Closing Comments in the Classic Interface

This section relates to accepting and closing comments and proposed changes in the PleaseReview classic interface which is used for all document formats other than Microsoft Word and PDF. By default, all reviews of Microsoft Word and PDF documents are presented in the PleaseReview interface, refer to Accepting and Closing Comments.

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.
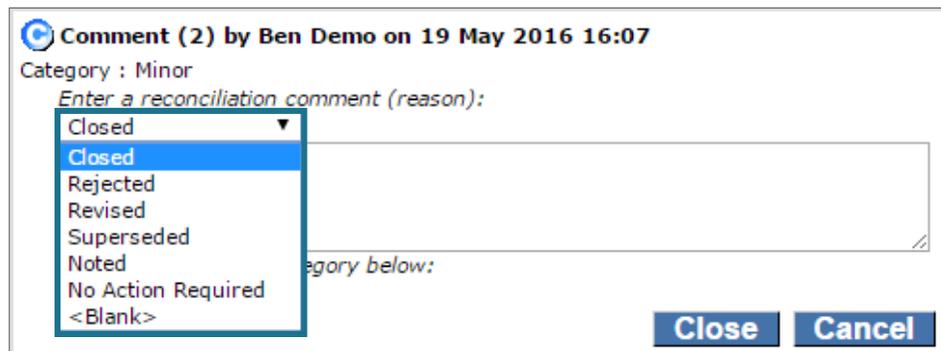
The drop-down list is site-configurable.

Once accepted or closed, the status of the comment/proposed change is updated and clearly displayed:
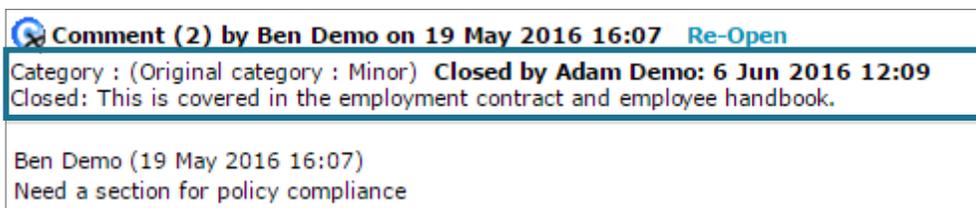
The option to 'Re-Open' a comment or proposed change will be available for all comments and the most recent change accepted/closed on a paragraph.

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.

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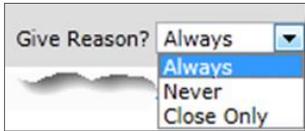
		Always	Always prompted to give a reason.
		Never	Never prompted to give a reason.
		Close Only	Only prompted to give a reason when closing.

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.

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:

Making New Comments or Proposed Changes

If an Author/Owner makes a new comment, proposes a new change or revises as 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:

Editing Proposed Changes

In addition to 'Accept' and 'Close', each proposed change 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.

Accept/Close All

Authors/Owners can 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 ☐ Merged ☐ Accepted ☑ Open
Type of comment	☑ All ☑ General ☑ Comment ☑ Proposed Change
Comment category	☑ All ☑ Minor ☑ Typo ☑ Major ☑ Cosmetic ☑ <blank>

Participant
☑ All
☑ Adam Pontipee   ◉ Made a comment
☑ Caleb Simmons   ○ Participated in discussion

Date
◉ All
○ Since I [entered the review 16 Aug 2018 11:32 AM ▾]
○ Since:
    date :
    time : [00 ▾] [00 ▾]

<   August 2018   >

SUN	MON	TUE	WED	THU	FRI	SAT
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	5	6	7	8

Action: [Accept all ▾]

Enter a reconciliation comment (reason):

[Accepted ▾]

[   ]

☐ *Change category on all comments:* [Minor ▾]

[Return to default]   Number of comments currently selected :4   [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 proposed changes on a paragraph are selected and (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.

Closing and Completing a Review

A review Owner can close and complete a review from the 'Reviews I Own' view in the PleaseReview inbox (see Reviews I Own).

This allows the review Owner to close the review to further comment and download the documents/reports required and/or check-in new versions of reserved documents.

Option	Description
Close	Closing the review will prevent Reviewers from making further comments on the review (read-only). The Owner and Author(s) can still make comments and changes, and Accept and Close comments and changes.
Complete	Completing the review will prevent any further activity on the review for all participants (read-only).
Finish PleaseReview	Selecting 'Finish PleaseReview' will end the Workflow and allow the Owner to check in the revised document(s) (where appropriate) or cancel check out.

Note: It is only possible to 'Finish PleaseReview' when all participants in the review have updated their Workflow status to complete. If any participants have not completed the Workflow via 'My Tasks', you will be presented with a warning message.

In order to progress, you need to either request that the participant(s) update their task to 'Complete', or you can cancel the participant(s) from the workflow, via the Timeline view on the Active Workflows Information page.

Click on the review name in the Active Workflows page under Home tab
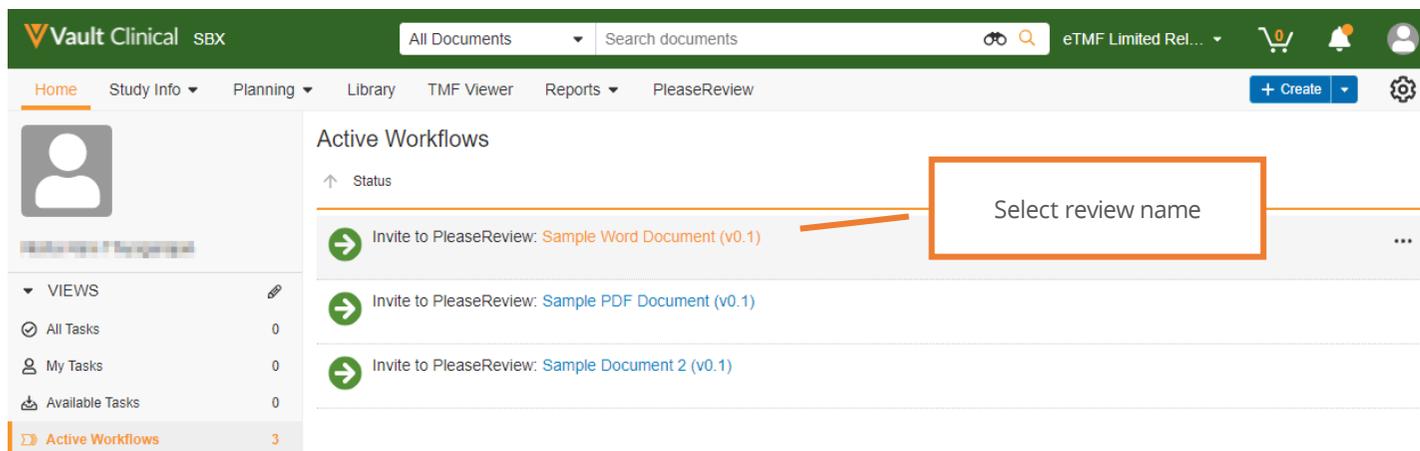
Click on the Timeline View and select the ellipses next to the participant(s) for option to cancel task.

Additional Options

Additional options of 'Re-open' and 'Delete' are available, dependent on the status of the review:

- Once a review is 'Closed', there is an option available to 'Re-open'. If enabled, this will re-open the review so that Reviewers can make comments;
- Once a document is 'Completed', then 'Finish PleaseReview', there is an option available to 'Delete' the review. (Note: If 'Delete Review' is selected when the 'Recycle bin' is disabled it will permanently delete the review with no option to restore it).

Document Check-in by PleaseReview

When a document is checked-in to the Vault from PleaseReview (this is for Word and Excel documents that are checked out when the review is created), selecting the 'Check in as new version' option from Finish PleaseReview checks-in the document complete with aggregated comments as a new version.

The aggregated comments include all open and accepted comments and proposed changes from all participants.

Each iteration of the document can be found in the Version History (go to library, select the document and open Version History), the status against the version of the document in Veeva Vault will state 'In PleaseReview' when the document has been revised via PleaseReview.

« Back to Library

⭐ 📄 Sample Word Document (v0.2) 🔒 ◆ [In PleaseReview]

INFORMATION ✎

▸ General

▾ Version History   See more details

		Created On	Status
📄	**0.2**	12/18/2019	In PleaseReview
📄	0.1	12/18/2019	Draft	⋯

▸ Metrics

▸ Quality Control

▸ Product Information

| | of 2 ⌄ |

SAMPLE WORD DOCUMENT

Sample Word Document v1

Section 1
Video provides a po
Online Video, you can paste in the embed code for the video you want to add.
You can also type a keyword to search online for the video that best fits your
document.

Differences between versions

To make your document look professionally produc
footer, cover page, and text box designs that comp
example, you can add a matching cover page, heade
and then choose the elements you want from the different galleries.

Sub section 1.1
Themes and styles also help keep your document coordinated. When you click

Timeline view

Timeline View

Cancelling the Veeva Vault Workflow

It is possible to cancel the Veeva Vault workflow associated with a review in PleaseReview, via Active Workflows.

If this occurs the review will still be available within 'My Reviews', and a warning indicator will appear against the review.

When the workflow is cancelled, it is still possible to 'Close' and/or 'Complete' the review, however there will be no option to 'Finish PleaseReview' and check in any revised document(s). Also note, that when cancelling the workflow the documents remain checked out in the vault, so the check-out will need to be carried out manually (via the actions menu).

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:
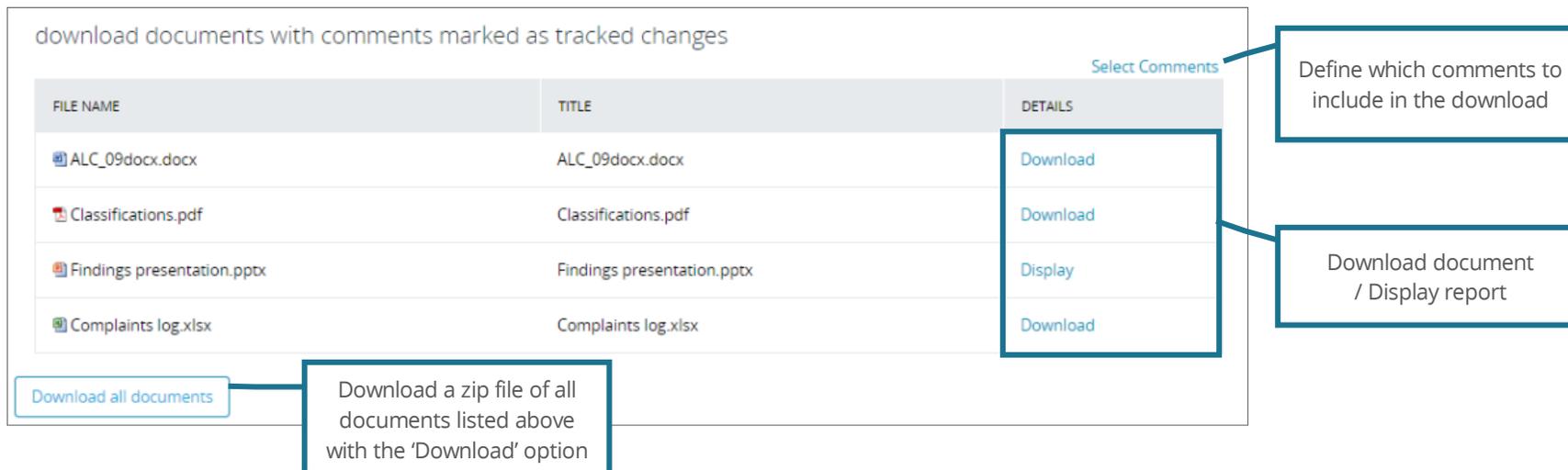
The document/report is retrieved by selecting the 'Download' or 'Display' link. Selecting the 'Download All' option (only available from the review closeout) will download a zip file containing all documents available in PleaseReview which have the download option.

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.

Embedded Attachments in Word Documents

If a review participant adds an attachment to a comment / proposed change /discussion thread in a review of a Word document, the attachment is displayed in the Word document as an icon and can be downloaded directly from within Word by double-clicking the icon:
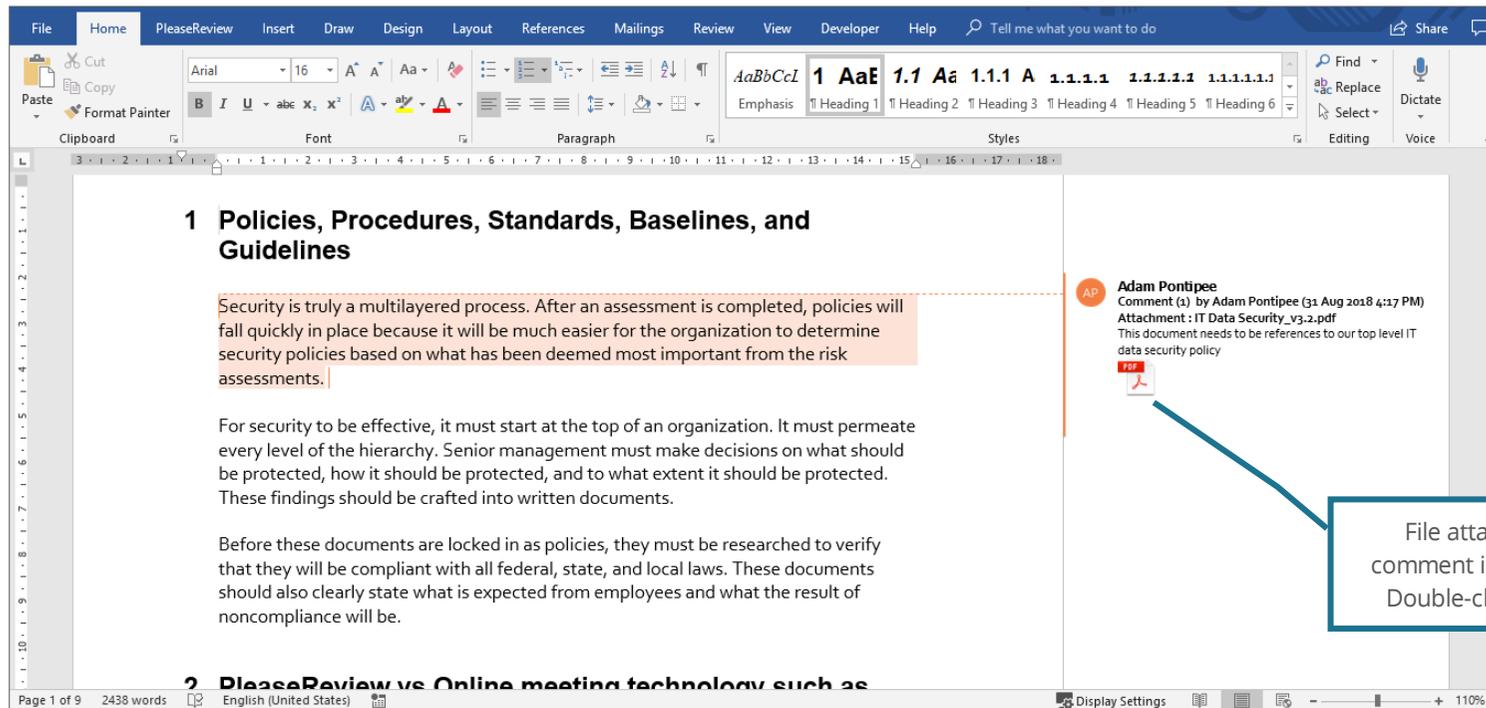
Notes:

- If the attachment has been applied to a change that is accepted, it will not display as a tracked change in the Word document. If the document is downloaded with 'accepted changes as tracked', the attachment will be visible in the tracked change;
- Any attachments in an unsupported document format will open in a zip file.

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	☐ All ☐ Closed ☐ Merged ☑ Accepted ☑ Open
Type of comment	☑ All ☑ General ☑ Comment ☑ Proposed Change
Comment category	☑ All ☑ Minor ☑ Typo ☑ Major ☑ Cosmetic ☑ <blank>

Participant
☑ All
☑ Adam Pontipee
☑ Ben Pedeiu
☑ Daniel Henry
☑ Gideon Ricci
☑ Harriet Newborn

◉ Made a comment
○ Participated in discussion

The default download includes all open and accepted comments from all participants.
It does not include closed comments

Date
◉ All
○ Since I [entered the review 17 Aug 2018 11:39 AM ▼]
○ Since:
date :
time : [00 ▼] [00 ▼]

< August 2018 >
SUN MON TUE WED THU FRI SAT
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 5 6 7 8

Note: Un-checking the 'Comment' box in the Type of comment section will ensure no comments appear in the document download.

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':

Selecting the 'Comments only' option means that all comments and proposed changes will be included in the document as Word comments only.

Selecting 'Tracked Changes' opens two further options which control how comments and proposed changes are displayed in the document download:

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:

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.

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	Word metadata is defined as all information contained in the Word document which is not document text itself. Selecting this option will: • Remove all standard document properties; • Remove all custom document attributes; • Remove all previous tracked changes (which were in the document prior to upload to 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 were in the document prior to upload to PleaseReview); • Remove all text formatted as hidden. 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.
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.

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.

PDF Document Download

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.

Selections specific to PDF documents:

☐ Produce a clean set of comments (no replies or status information)
    ☐ Comment author: [_____]
    ☐ Comment date
      date :

<		August 2018				>
SUN	MON	TUE	WED	THU	FRI	SAT
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	5	6	7	8

      time : [00 ▼] [00 ▼]

☐ Export redactions as PDF redaction marks (redacted content still visible)

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).
Export redactions as PDF redaction marks (redacted content still visible)	Allows you to download redactions as 'marked for redaction', rather than the default which applies the redactions to the downloaded PDF. 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.

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'
PPD After an asses fall quickly in place because it will be much easier for	CCI After an asses fall quickly in place because it will be much easier for
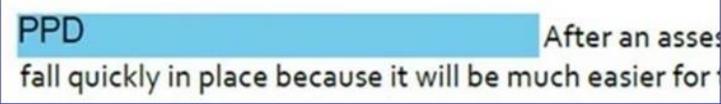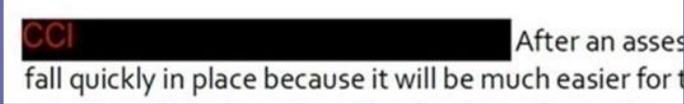
Notes:

- 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.

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
```

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:

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.

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 edit-in-Word zones, you will not be able to make comments or propose changes on the zones regardless of their status in the review. This is because the zone may have been updated by the time your comments are uploaded (see Zones in the OLC).

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):

Select PleaseReview server
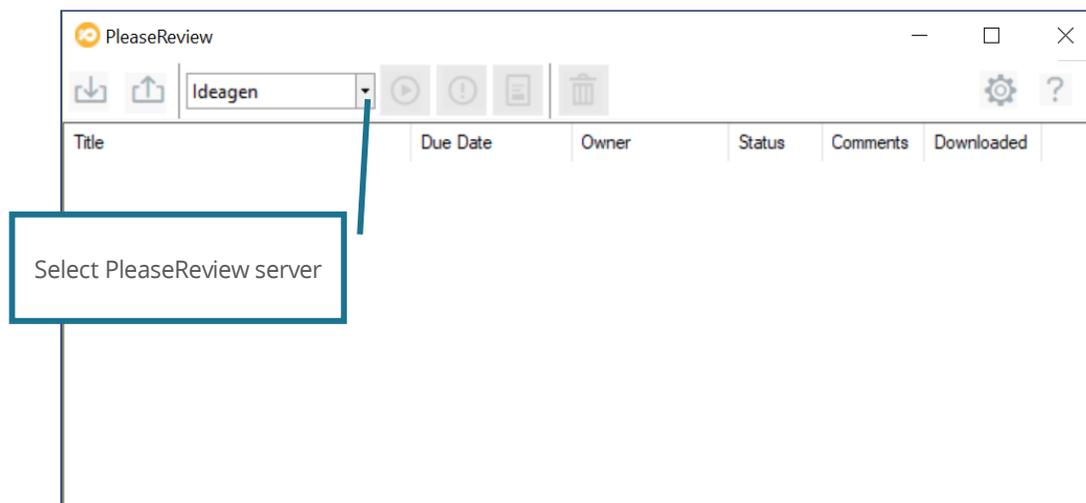
This will prompt you to enter your password to login to the selected server. Enter the same login details as when accessing PleaseReview online.

Once logged in, select the 'Download' icon to download your reviews:
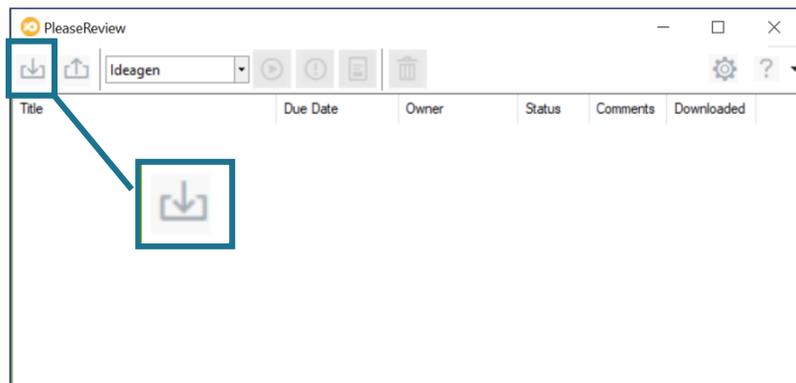
You will then be presented with a list of reviews available to you. This list will be all reviews for which you are a Reviewer, and that are available for offline review, from all Workgroups. **Note**: if you have already downloaded a review(s) shown in the main window, it will not appear in this list.

Select the review(s) you wish to download. You can select more than one review by pressing the Ctrl key as you select reviews. Then click 'Download'.

Select reviews then click Download.
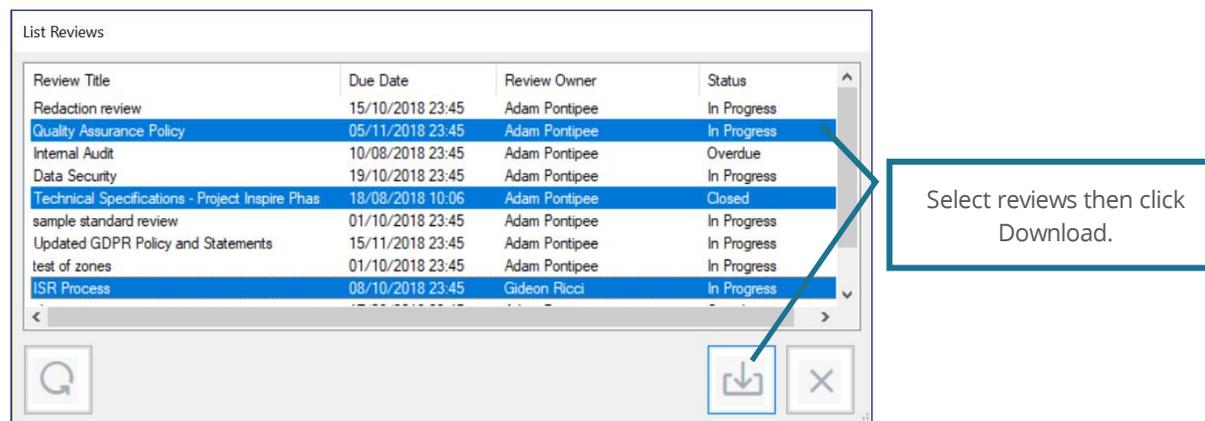
The reviews will be downloaded into the main OLC window and your status in the online Review Control Panel will automatically be set to 'Offline'.

Note: if a review is closed, you can still download it, but it will be read-only.

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:

	Enter the review.		Delete the review from the OLC.
	Open the Review Control Panel.		An error has occurred. The OLC has failed to upload the comments.
	Open the report. This will show only the comments and changes you have made in the OLC.		Options button.
			Display about & log-file information.

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 review interface. For reviews containing other document formats, or feedback documents, you are presented with the PleaseReview classic interface.
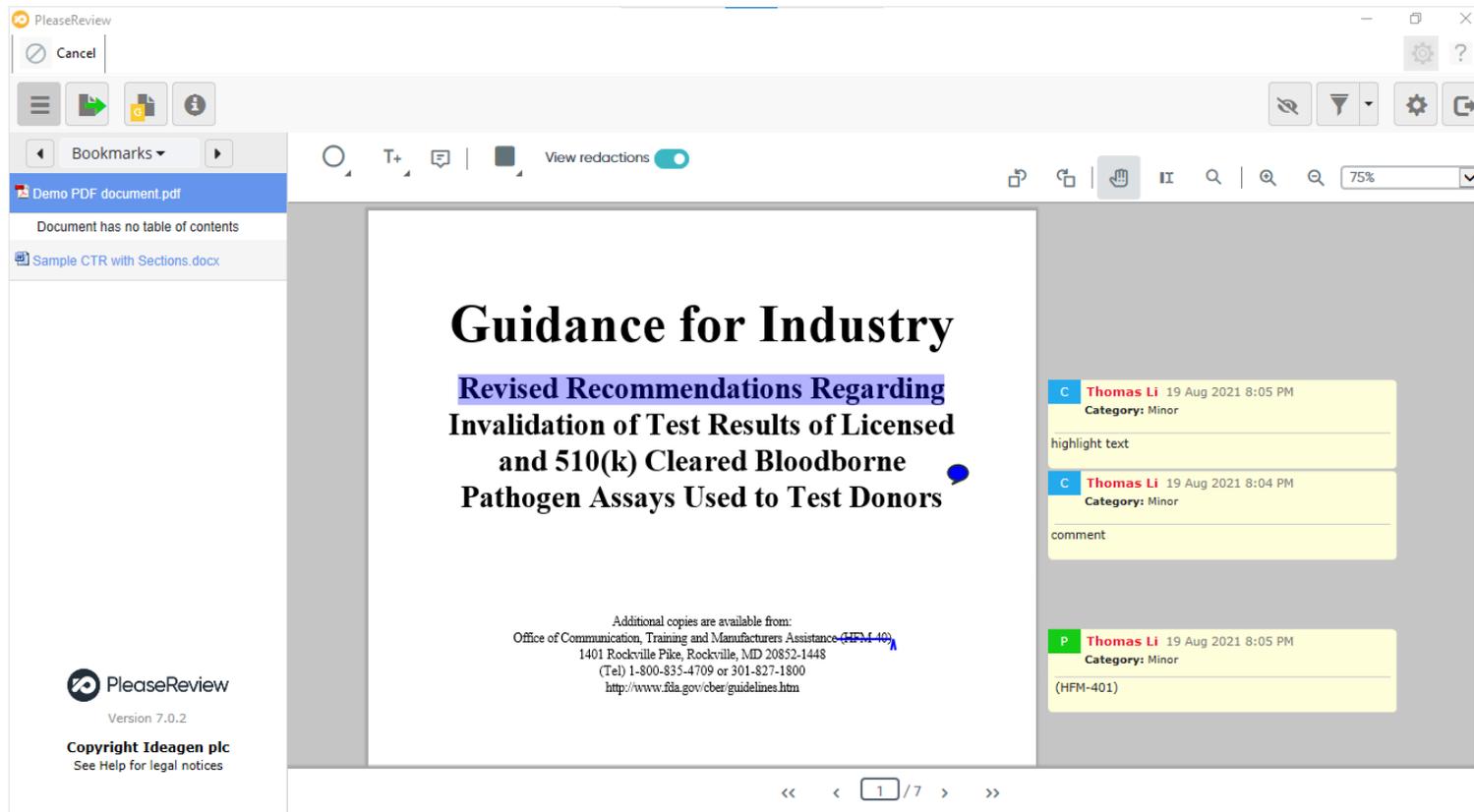
All comments and proposed changes on the review at the time of download will be displayed, and you can make new comments and proposed changes in the usual way.

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.

Uploading Comments Back to PleaseReview

When you are back online you can use the upload functionality to return comments and proposed changed to the server and automatically remove the review from the OLC.

Select the 'Upload' icon:
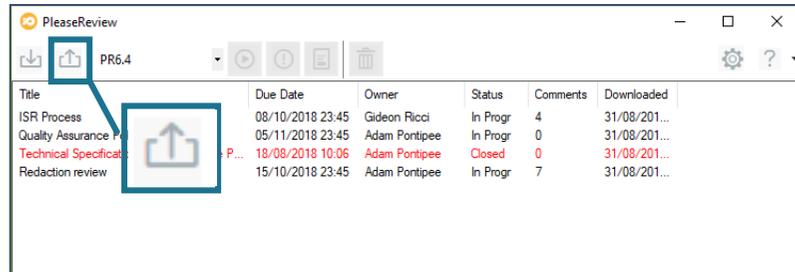
The upload reviews dialog box will open, displaying all your reviews on the OLC. All reviews will be automatically uploaded and deleted from the OLC unless you select 'Keep'.

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.
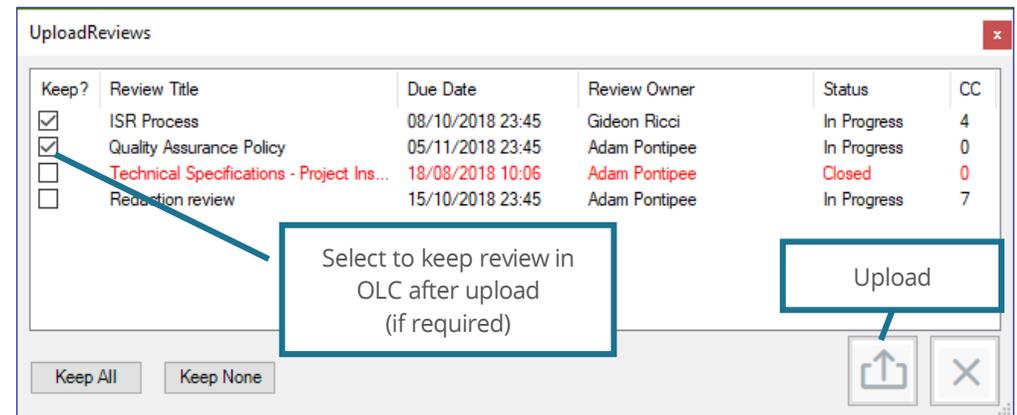
Please **note**: If the Review Owner has deleted the review but it is still in the recycle bin (if enabled) the OLC will still successfully upload comments. The Review Owner will get the standard watching email notification if watching the review.

Zones in the OLC

The OLC will respect zones with review permissions i.e. if the review Owner has assigned you different review permissions for different zones of the document in the review, then the permissions will be respected in the OLC.

If Edit-in-Word zones have been set in the review, the information will be visible in the OLC however you will not be able to make comments or propose changes on the zones regardless of their status in the review as the zone may have been updated by the time your comments are uploaded. If you are the Contributor assigned to the zone you will not have any of the Contributor features (i.e. download, upload) available.
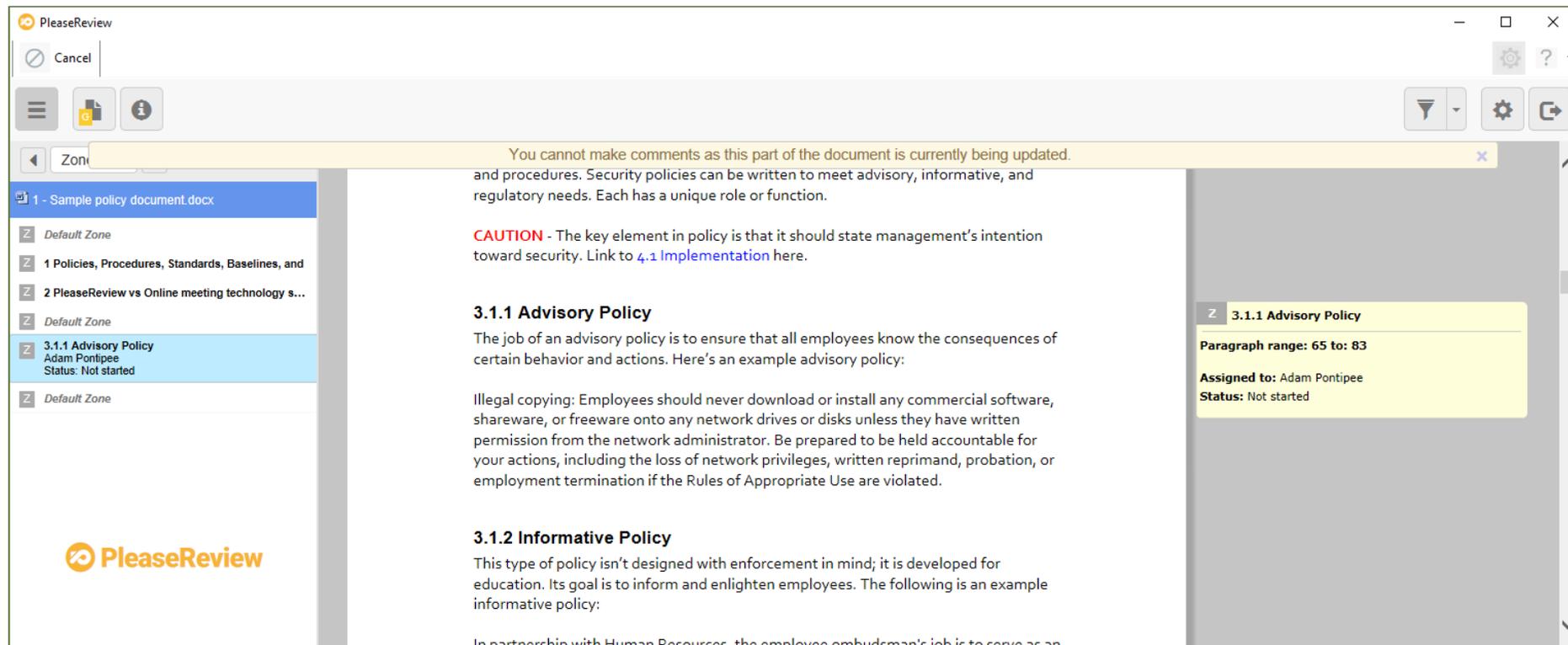
Note: it is possible that by the time you are ready to upload comments made in the OLC that the review Owner may have assigned a zone which includes a paragraph where you have commented. In this instance the upload of the comment(s) will fail, see Zones Assigned after Download for more information.

Feedback Documents in the OLC

Feedback documents are supported in the OLC, however, there are a few things to be aware of:

- Any 'likes' or 'dislikes' made in the OLC will not be synced to the online version on upload (note that there will be no warning of this);
- There is no option to re-order bullet points in the OLC.

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.
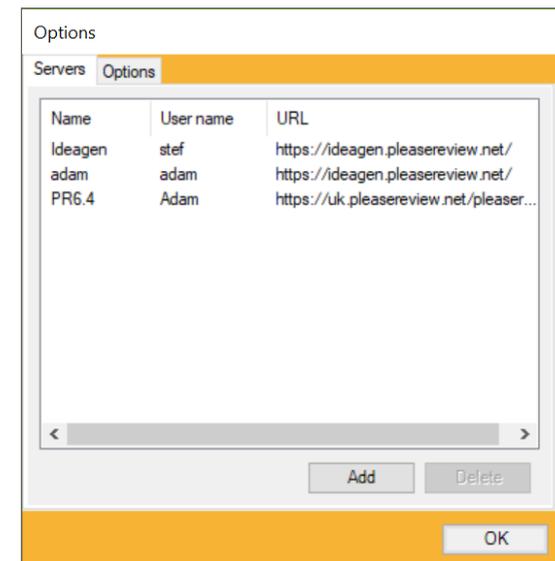
When you re-sync the review, the settings will revert to your online settings.
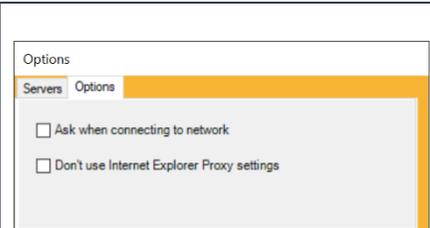
Multiple Servers and Other Options

The OLC has the capability of working with multiple PleaseReview servers. If 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.
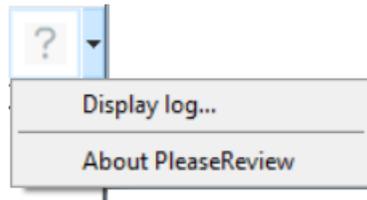
The 'Options' icon gives you the ability to add servers and set other options. The 'Servers' tab allows the addition/deletion of servers. Simply follow the server set-up wizard or select the server and delete it.

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.

Log Files

The display log option displays the OLC log file for trouble shooting purposes:

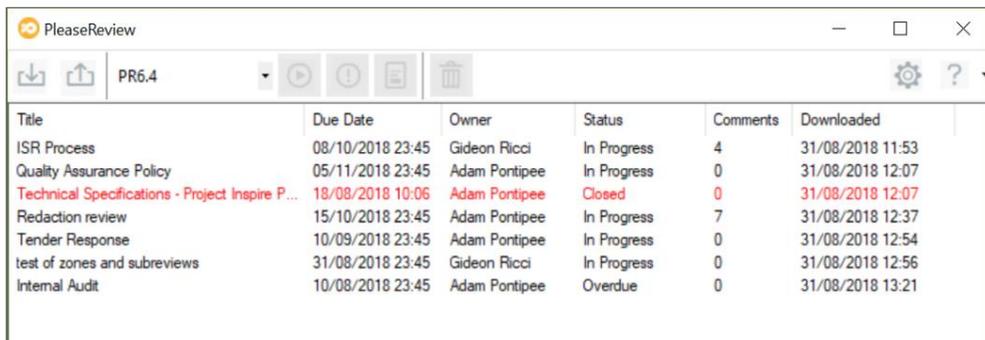|			
	Refresh the log.		Save the file as a .log file to a known location.
	Copy the contents to the clipboard for pasting into an email or other location.		Delete the log.

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:

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 to notify the review Owner. 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.

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).

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':

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. Note that OpenSpace reviews are not available in flight mode.

Reviewing in Flight Mode

Once offline, the Flight Mode screen, which you have bookmarked, will display your downloaded reviews:

Downloaded reviews display here

Current Internet status
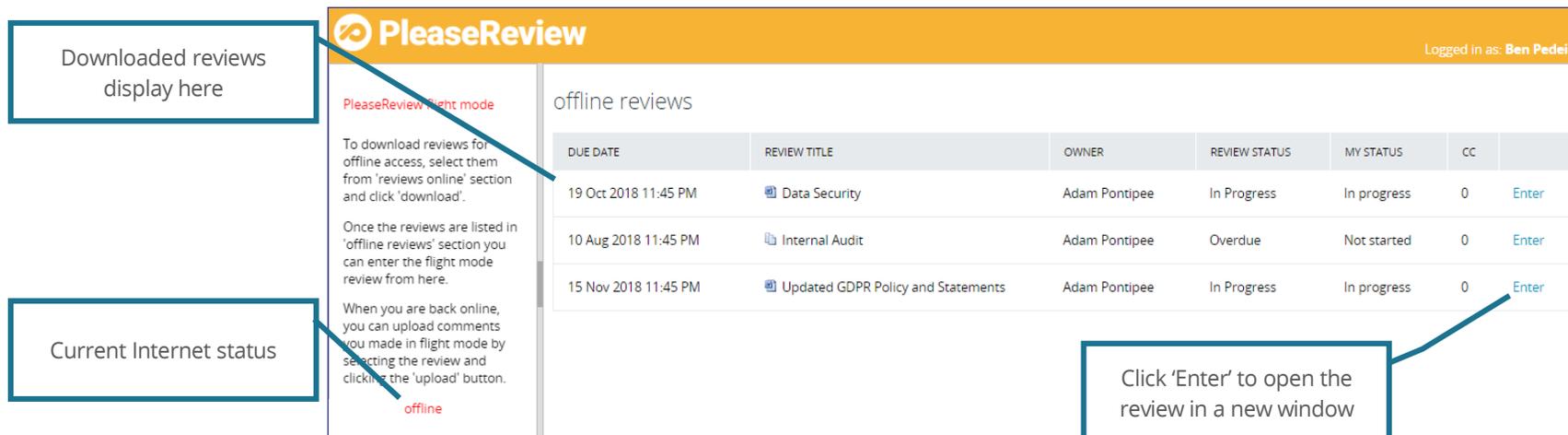
PleaseReview

Logged in as: **Ben Pedeiu**

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	
19 Oct 2018 11:45 PM	Data Security	Adam Pontipee	In Progress	In progress	0	Enter
10 Aug 2018 11:45 PM	Internal Audit	Adam Pontipee	Overdue	Not started	0	Enter
15 Nov 2018 11:45 PM	Updated GDPR Policy and Statements	Adam Pontipee	In Progress	In progress	0	Enter

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.

Action toolbar

Leave the review

1 Policies, Procedures, Standards, Baselines, and 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 easier for the organization to determine security policies based on what has been deemed most important from the risk assessments.

For security to be effective, it must start at the top of an ~~organization. It must organization and~~ 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~~ formal documents.

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 and what the result of noncompliance will be.

Existing comments and changes made before download

Highlighted paragraphs indicate comments and changes made offline

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:
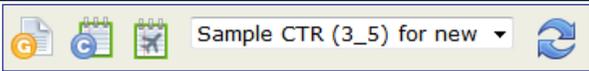
	Opens the comment window to allow the user to make a 'General Comment' or view the general comments of others.
	Opens the Online Reconciliation Report displaying all comments and proposed changes which had already been made before the review was downloaded.
	Opens the Offline Reconciliation Report displaying all comments and proposed changes which have been made whilst in Flight Mode.
	Refreshes the document
To display another Word document in the review, you can select it from the drop down list on the toolbar:	
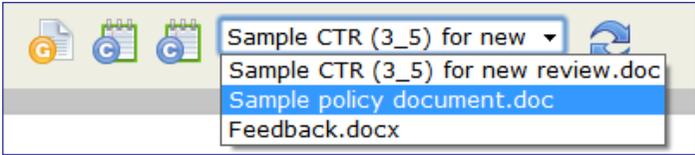
On leaving the review, you are invited to set your review status and review 'watch' status and enter any summary comments.

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.

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.

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		
19 Oct 2018 11:45 PM	Data Security	Adam Pontipee	In Progress	Completed	4	Enter	☑
10 Aug 2018 11:45 PM	Internal Audit	Adam Pontipee	Overdue	Not started	0	Enter	☐
15 Nov 2018 11:45 PM	Updated GDPR Policy and Statements	Adam Pontipee	In Progress	In progress	5	Enter	☑

Upload   Upload and keep   Delete

Number of comments waiting to be uploaded

Select the review(s) to upload

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.

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.

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.
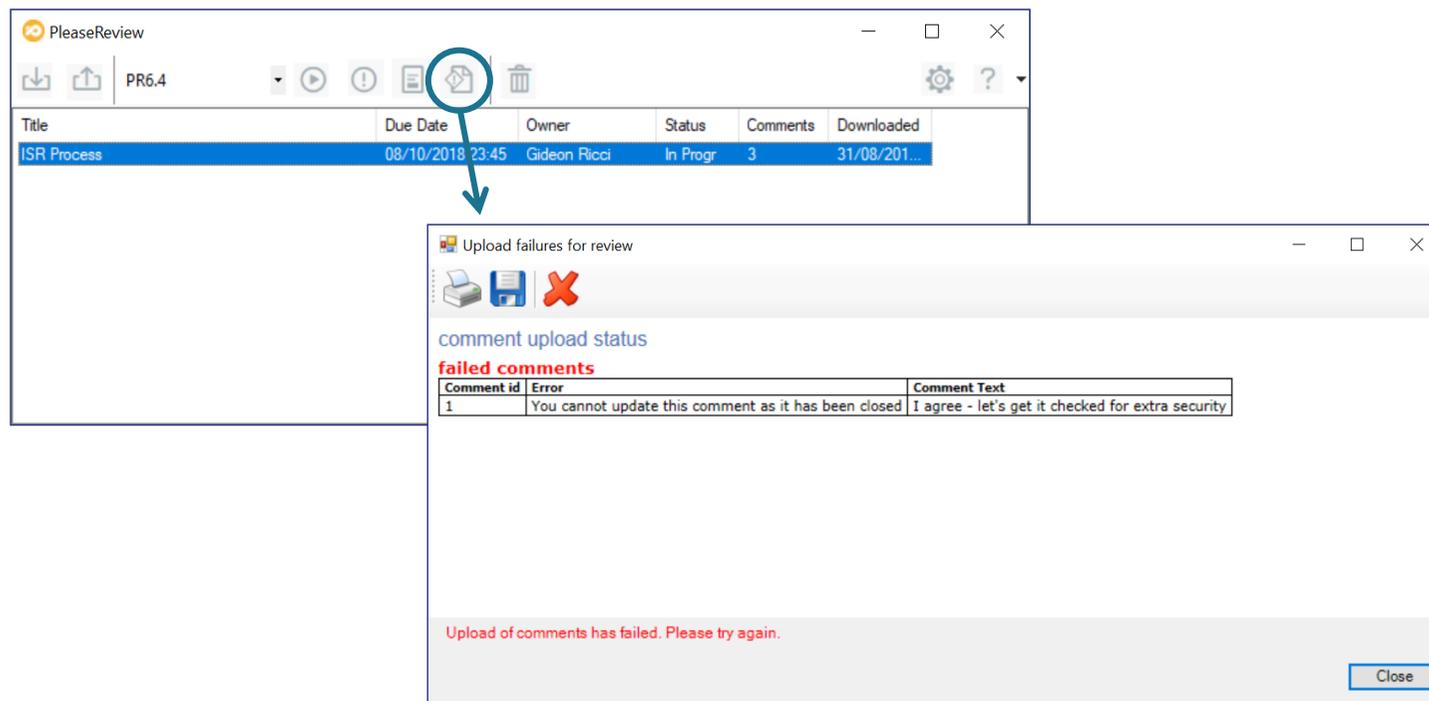
To rectify the situation, re-enter the review, delete the appropriate comment(s) and re-upload the review. The comments can be notified to the review Owner by email or another appropriate means.

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.
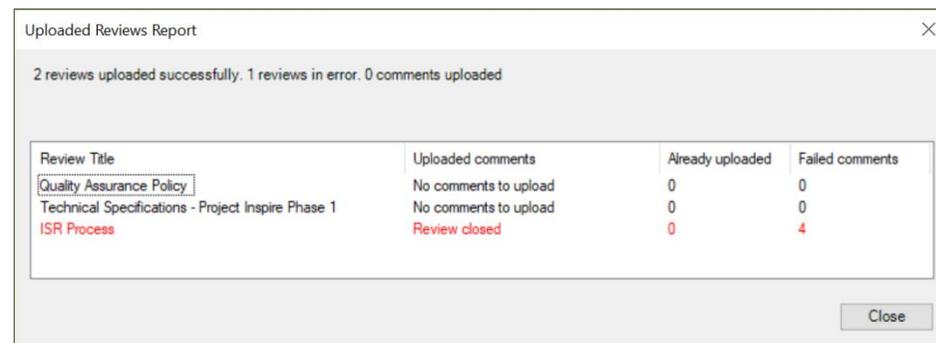
Uploaded Reviews Report

2 reviews uploaded successfully. 1 reviews in error. 0 comments uploaded

| Review Title	Uploaded comments	Already uploaded	Failed comments
Quality Assurance Policy	No comments to upload	0	0
Technical Specifications - Project Inspire Phase 1	No comments to upload	0	0
ISR Process	Review closed	0	4

Close

Zones Assigned after Download

It is possible that the review Owner may assign new zones in the review after you have downloaded it to the OLC. If you make a comment on a paragraph which is subsequently included in a zones the uploading of your comments from the OLC may fail. In this instance you will see a warning message.

Clicking OK will display the Uploaded Reviews Report:
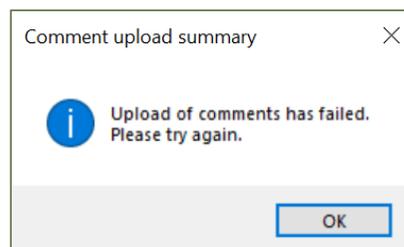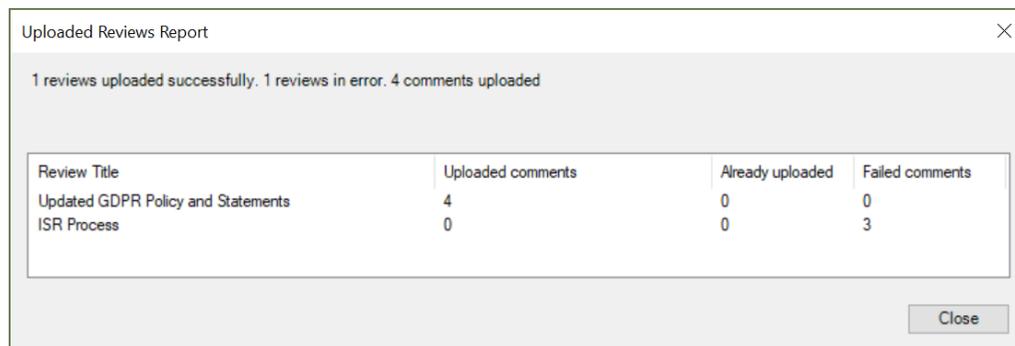
Comment upload summary

Upload of comments has failed. Please try again.

OK

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.
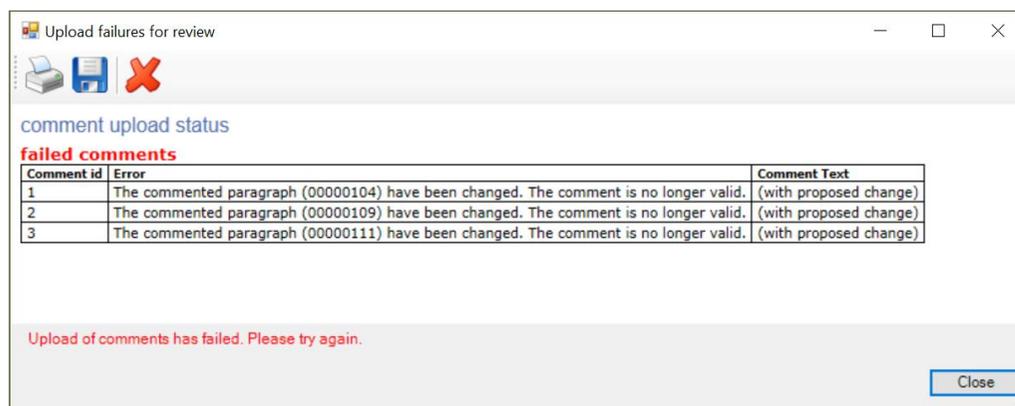
To rectify the situation you can re-enter the review, delete the appropriate comment(s) and re-upload the review. The comments can be notified to the review Owner by email or another appropriate means.

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:
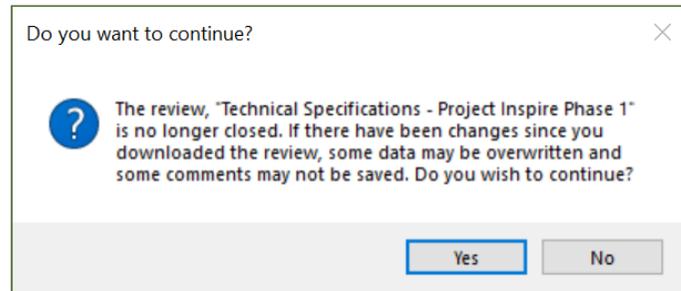
If you continue you will be notified if any comments fail to upload. You can then access the error report as described in the previous section to see which comments are affected.

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 Log Files