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MADCAP CONTRIBUTOR 9 r3

# Review Workflow

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# Introduction

If you are using a full registered mode of Contributor, you can review and edit documents sent to you by others.

If you are using the free review mode, you can review documents sent to you by others and add annotations (comments). However, you cannot edit the documents.

**This chapter discusses the following:**

- Reviewing Documents—Full Registered Mode ..... 6
- Reviewing Documents—Free Annotation-Only Mode ..... 9
- Regular Document Files vs. Lingo Translation Files .....10
- What’s Noteworthy? .....11

# I Reviewing Documents—Full Registered Mode

1. **Open** You can open the review package file from your email, or from a link sent to you by the author. The files in the review package are listed in the Review Packages window pane at the bottom. Double-click a row to review and edit a particular file.

If the review package contains topics as well as snippet files, you can open the snippets too. You can open snippets by double-clicking them in the Review Packages window pane. Another approach is to right-click the snippet where it is inserted in a topic (or in another snippet) and from the context menu select **Open Snippet File**.

2. **(Optional) Insert Comments** You can insert annotations (comments) that are associated with specific areas of text in the document. These annotations do not become part of the content within the document, but rather are intended for internal use between you and others. (Do not select more than one paragraph or click at the very end of paragraphs; otherwise, the "Insert Annotation" option will not be enabled.) See "Annotations" on page 29.
3. **Return** You can return the review package to the author in various ways. Work with the author to determine how he or she wants to be notified. If the author is using a built-in email feature, this might simply entail clicking **Return to Sender** in the Review Packages window pane. Otherwise, you might need to manually inform the author via another method (e.g., email, chat). See "Returning Documents to Authors" on page 34.

This is a typical document sent for review by an author.

The screenshot shows the Microsoft Word interface with the Review tab selected. The ribbon includes options for Review Packages, Track Changes, Accept Change, Reject Change, Show Changes, Previous Change, Next Change, Insert Annotation, Delete Annotation, and Review Options. The main document area displays a page with the title "Company" and several lines of placeholder text. A "Changes" pane on the right shows a list of changes. A "Review Package" task pane at the bottom lists the files included in the review package.

This file is one of several sent for review in the same package.

When you are finished reviewing all files in the package, you can click this button to return the package to the author if you are using the built-in email feature. Otherwise, simply let the author know in some other way that you are finished.

All of the files in the review package are listed in this window pane. You can double-click any row to open a particular file.

File	Folder
Basic-Steps.htm	Content/A-Intr...
Company.htm	Content/D-Ref...
FAQs.htm	Content/D-Ref...
Feature1.htm	Content/B-Fea...
Feature2.htm	Content/B-Fea...
Feature3.htm	Content/B-Fea...

You can insert an annotation (comment) into the document by clicking this button.

This is the text for the document. You can make the text area wider by enlarging the program window or turning off the sidebar (by clicking "Show Changes" in the Review ribbon).

The screenshot displays the Microsoft Word interface with the Review ribbon active. The ribbon includes buttons for Review Packages, Track Changes, Accept Change, Reject Change, Show Changes, Previous Change, Next Change, and Insert Annotation. The document content shows a 'Company' header, a paragraph of text with red strikethroughs, and a form with fields for Company Name, Street Address, City/State/Zip, Phone Number, and Email. A right-hand sidebar shows tracked changes: 'Added [PS]', 'Deleted [PS]', and an 'Annotation [PS]' with the text 'The new phone number is 555-867-5309'. A 'Review Packages' task pane at the bottom lists files like 'Basic-Steps.htm', 'Company.htm', 'FAQs.htm', 'Feature1.htm', 'Feature2.htm', and 'Feature3.htm'.

Your changes are tracked.

Added [PS]  
Deleted [PS]  
Annotation [PS]  
The new phone number is 555-867-5309

This is an annotation inserted into the document.



# I Reviewing Documents—Free Annotation-Only Mode

1. **Open** You can open the review package file (e.g., from your email or a link sent by the author). The files in the review package are listed in the Review Packages window pane. Double-click a row to review and edit a particular file.

If the review package contains topics as well as snippet files, you can open the snippets too. You can open snippets by double-clicking them in the Review Packages window pane. Another approach is to right-click the snippet where it is inserted in a topic (or in another snippet) and from the context menu select **Open Snippet File**.

2. **(Optional) Insert Comments** You can insert annotations (comments) that are associated with specific areas of text in the document. These annotations do not become part of the content within the document, but rather are intended for internal use between you and others. (Do not select more than one paragraph or click at the very end of paragraphs; otherwise, the "Insert Annotation" option will not be enabled.) See "Annotations" on page 29.
3. **Return** You can return the review package to the author in various ways. Work with the author to determine how he or she wants to be notified. If the author is using a built-in email feature, this might simply entail clicking **Return to Sender** in the Review Packages window pane. Otherwise, you might need to manually inform the author via another method (e.g., email, chat). See "Returning Documents to Authors" on page 34.

# Regular Document Files vs. Lingo Translation Files

For MadCap Lingo review package (LIREV) files, the XML Editor works a bit differently than it does for regular document files from products such as Flare or Word. That's because Lingo is a translation tool, so only text segments are important, and in particular, the target language segments. When you open a file from an LIREV package, the editor shows a table containing text segments from that file in the source and target languages. The status of each segment—which indicates how closely the target segment matches a translated segment in translation memory—is also shown.

The screenshot shows the MadCap Lingo XML Editor interface. A table displays the translation review data, and a file list below it shows the contents of the review package.

**Table 1: Translation Review Data**

ID	source text	target text	status
1	Humpty Dumpty	Humpty Dumpty	100%
2	Humpty Dumpty sat on a wall	Humpty Dumpty sentado en una pared	100%
3	Humpty Dumpty had a great fall	Humpty Dumpty tuvo una gran caída	100%
4	All the King's horses, And all the King's men		0%
5	Couldn't put Humpty together again		0%

**Table 2: Review Package File List**

File	Folder
Little Miss Muff...	Content/Content
Jack and Jill_es...	Content/Content
Humpty Dump...	Content/Content

Callouts in the image provide the following explanations:

- Text segments in the original language.** Points to the 'source text' column in the table.
- Translated text segments in the target language.** Points to the 'target text' column in the table.
- Matching percentage from translation memory.** Points to the 'status' column in the table.
- This Lingo review package contains three files.** Points to the file list table.

You can make changes only to the target segment, as well as insert annotations. In addition, you can make certain formatting edits to the target segment (e.g., bold, underline, color), but many other features (e.g., insert image, hyperlink, table) are disabled for Lingo review files.

The screenshot shows a Lingo review window with a table of segments. The table has columns for ID, source text, target text, and status. Callouts highlight that editing is limited to the target segment, that changes are tracked, and that annotations can be added. A status bar at the bottom shows 'Words: 72' and 'Font Scale: 100%'.

ID	source text	target text	status
1	Humpty Dumpty	Humpty Dumpty	100%
2	Humpty Dumpty sat on a wall	Humpty Dumpty se sentó en una pared	100%
3	Humpty Dumpty had a great fall	Humpty Dumpty tuvo una gran caída	100%
4	All the King's horses, And all the King's men	Todos los caballos del Rey, y todos los hombres del Rey	0%
5	Couldn't put Humpty together again	No se pudo unir a Humpty de nuevo	0%

Annotation [KS]  
You forgot to translate the final two segments.

## What's Noteworthy?

**!** **IMPORTANT** You cannot use the Internal Text Editor when working with review packages.

# Review Packages Window Pane

Supported In:



This window pane lets you view the files that are part of a review package file sent from an author. You can double-click on a file name to open it so that you can review and edit it. When you are finished and you save your changes, you can click the "Return to Sender" button in the local toolbar to email it back to the author.

**This chapter discusses the following:**

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# I How to Open This Window Pane

Do one of the following:

- **Email/Windows** Open a review package file received from an author.
- **Ribbon** Select **Review > Review Packages**.

# I Buttons and Sections



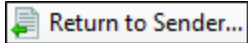
Saves changes to the active file.

---



Saves changes to all of the open files.

---



Return to Sender...

Opens a new email message with the file attached so that you can return it to the author.



**NOTE** There is more than one way to transfer files between individuals using Flare and Contributor. For example, you can: (1) use the integrated email feature with Microsoft Outlook, (2) add files to SharePoint or External Resources where others can access them, or (3) save files to your computer (**File > Save**, then **Save As** or **Save To**) and then manually transfer them using some method (e.g., email). If you want to use the integrated email feature, you must have matching versions of Contributor and Outlook. If you are using 64-bit Contributor, you need 64-bit Outlook. Likewise, if you are using 32-bit Contributor, you need 32-bit Outlook.



Opens the Columns dialog, which lets you configure the way the column information is shown.

---



Opens the selected item.

---



Opens the Properties dialog for the selected item.

---

Switch to TOC View

Switches to the TOC view. This lets you view the review package as a TOC *only if* the review package files have been sent by a Flare author from a TOC.

---

**Switch to Grid View**

Switches to the Grid view. This lets you view the review package as a list of files. This button is only active if you are currently in the TOC view.

---



Expands all of the folders so that you can see all of the files under each one. This button is enabled only if you are in TOC view.

---



Collapses all of the folders so that you can no longer see all of the files under each one. This button is enabled only if you are in TOC view.

---



Expands all of the folders with review files so that you can see all of the files under each one. This button is enabled only if you are in TOC view.

# Tracking Changes

For documents in Contributor, you can track changes and accept or reject those alterations individually. Each change is marked in a color (different colors for different users) and/or labeled in a sidebar. Tracked changes are visible only in the editor in Contributor. They are not visible when viewing any output created from the document (e.g., saving to HTM, XPS, or PDF files).

When this feature is enabled, every change to the document—along with the user who performed the change—will be stored in the document’s markup. For example, deleted text won’t actually be removed from the document, but will instead be marked as deleted in the code. However, if the change is accepted, the text will be removed from the document.

When a Flare author sends you a review package file (FLTREV) and you edit the content files within it, your changes are automatically tracked so that the author can easily see the changes you made. You cannot disable the track changes feature for these types of documents.

**This chapter discusses the following:**

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# I Examples

The following images show how tracked changes work in Contributor.

The sidebar indicates what has changed and who did it, by displaying each user's initials.

The screenshot shows a document editor interface. The main text area contains the following content:

This ~~topic~~ is a ~~very~~ good place to explain the high level concepts that allow a user to be successful with FictionSoft. ~~You might include~~ the following:

- Overall work ~~flow~~ for FictionSoft
- Important concepts necessary to be successful
- ~~Links to video tutorials~~
- Special language or jargon ~~to use~~ need to understand

The sidebar on the right displays a list of changes:

- Deleted [AL]
- Added [AL]
- Added [PS]
- Deleted [PS]
- Added [JK]

Colored lines connect the changes in the sidebar to the corresponding text in the document: blue lines for 'Deleted [AL]' and 'Added [AL]', red lines for 'Added [PS]' and 'Deleted [PS]', and green lines for 'Added [JK]'.

In this example there are changes in three colors (blue, red, and green), which means three different users have made changes.

This ~~topic~~ is a ~~very~~ good place to explain the high level concepts that allow a user to be successful with FictionSoft. ~~You might include~~ the following:

- Overall workflow for FictionSoft
- Important successful
- Links to v
- Special language or jargon ~~that~~ a user will need to understand
- Any other information ~~that~~ a user would need

Deleted [AL]  
Added [AL]  
Ad Accept Insertion  
Reject Insertion  
Deleted [PS]  
Added [JK]  
Deleted [PS]  
Deleted [JK]

By right-clicking on a change, you can choose whether to accept or reject it.

# Hiding and Showing Changes and Annotations

Supported In:



You can hide or show tracked changes and annotations in the active document.

## How to Hide and Show Changes and Annotations

1. Open the document or topic.
2. Select **Review > Show Changes**.

# Changing Your User Name and Initials

Supported In:



When you first install and launch Contributor, your login user name is captured and stored in the Review tab of the Options dialog (**File > Options**). The first two letters of the user name are also stored as your initials. This information is employed whenever you use the track changes and annotations features.

For example, if you insert an annotation in a topic, your initials are displayed at the beginning of the comment so that other users know where the annotation came from.

You can always change your Contributor user name or initials to something else.

☆ **EXAMPLE** Your login user name is "johndoe." In that case, your initials are stored automatically as "jo." Although you want to keep your user name as is, you want to change the initials to "jd," which other users will more readily associate with you. Therefore, you open the Options dialog (**File > Options**) and use the Review tab to change only your initials.

## How to Change the User Name and Initials for Reviews

1. Select **Review > Review Options**.
2. Change the text in either the **User Name** or **Initials** fields.
3. Click **OK**.

# Changing the Display of Tracked Changes

Supported In:



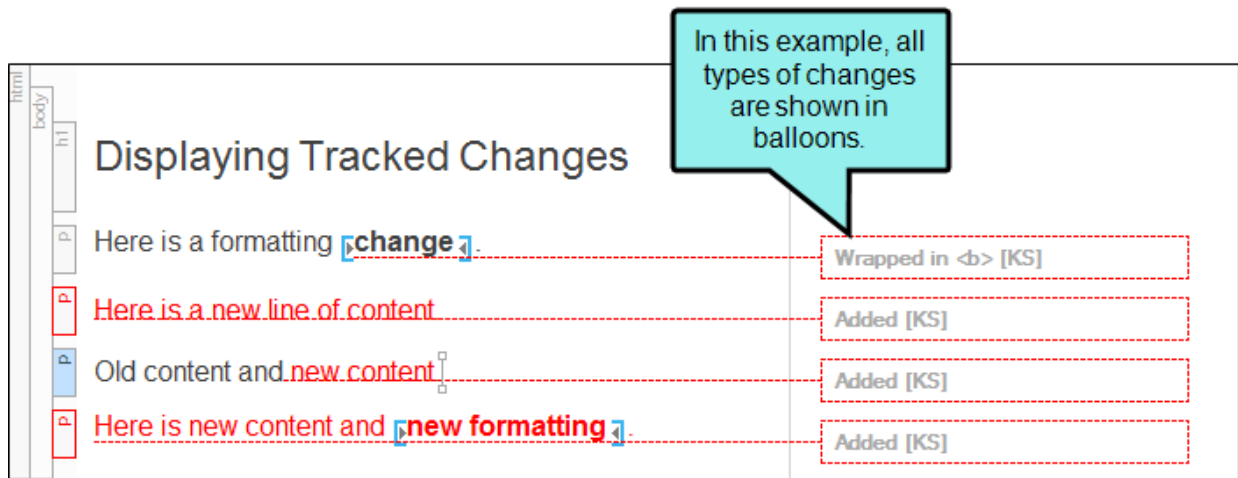
You can change the way tracked changes are displayed in the interface (e.g., in balloons, inline). You can also enable or disable change bars.

## How to Change the Display of Tracked Changes

1. Select **Review > Review Options**.
2. In the **Tracked Change Display** section, choose any of the following.

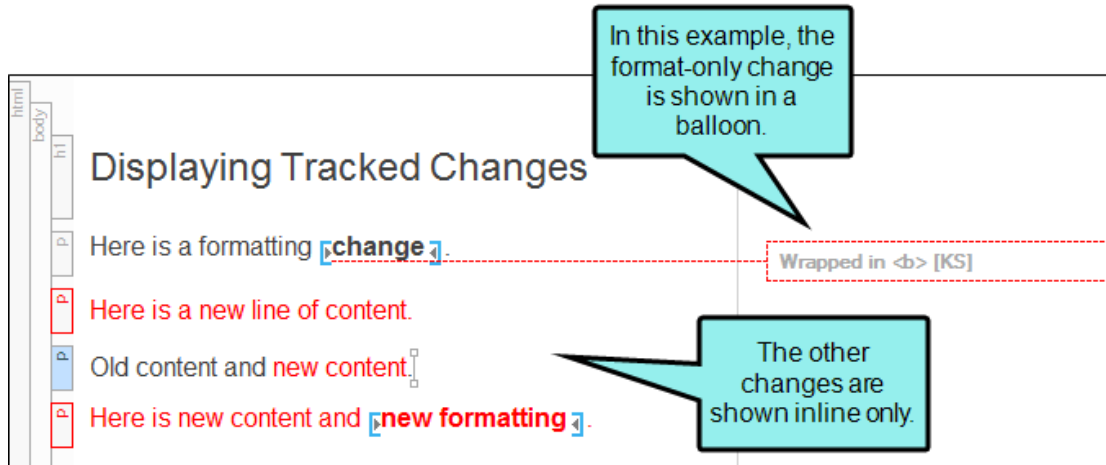
### TO DISPLAY ALL CHANGES IN BALLOONS

If you select this option, all changes—text and formatting—will be shown in balloons in the sidebar.



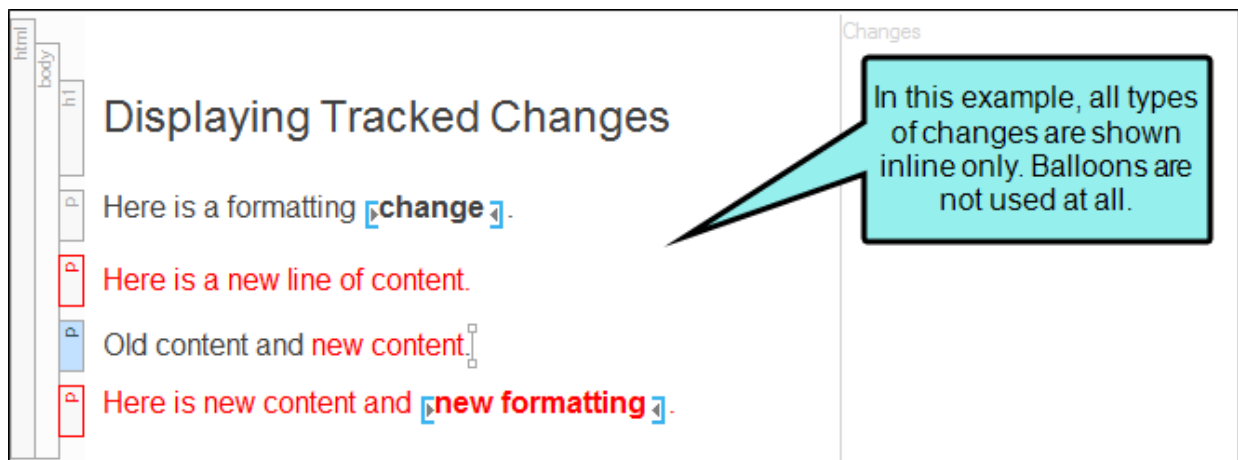
## TO DISPLAY ONLY FORMAT CHANGES IN BALLOONS

If you select this option, changes that include content only (or content plus formatting) will be shown inline. But changes that contain formatting modifications only will be shown in balloons in the sidebar.

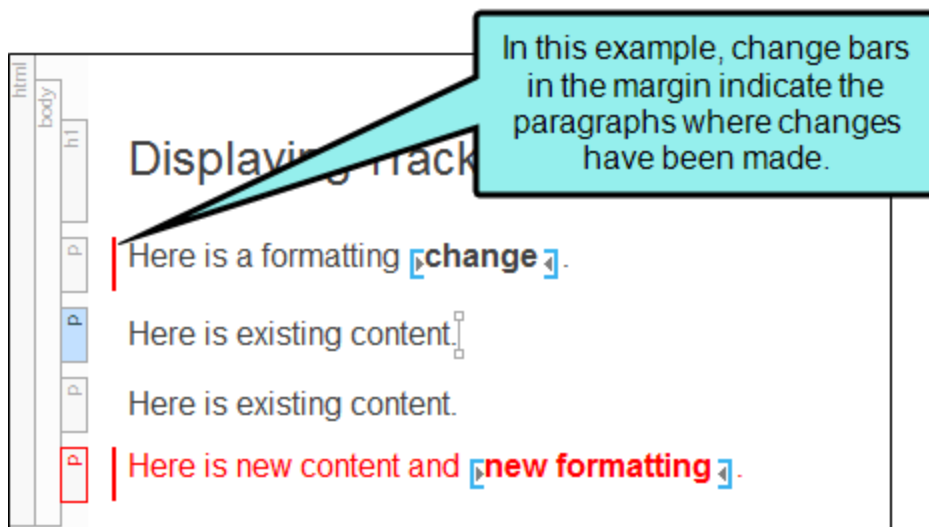


## TO DISPLAY ALL NON-FORMAT CHANGES INLINE


If you select this option, all text changes will be shown inline. Balloons are not used.



3. In the **Change Bar** section, select whether or not you want to turn on change bars. If you turn on change bars, a bar appears on the left side of the paragraph where a change has been made. Change bars appear in PDF output and the XML Editor.



4. Click **OK**.

 **NOTE** In order to see your selection in action, make sure you have chosen to show tracked changes. See "Hiding and Showing Changes and Annotations" on page 19.

# Changing the User Color for Reviews

Supported In:



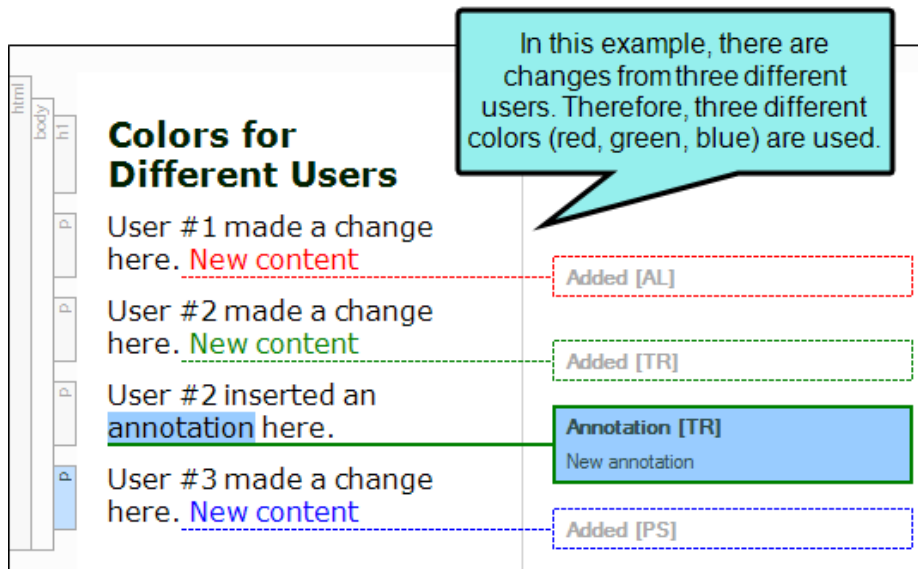
The tracked changes and annotations for each user can be shown in a separate color. You also have the option of choosing a specific color for all users.

## How to Change the User Color for Reviews

1. Select **Review > Review Options**.
2. In the **User Colors** section, choose one of the following.

### TO USE A DIFFERENT COLOR FOR EACH USER

Select this option if you want Contributor to automatically assign a different color for each user.



**Colors for Different Users**

User #1 made a change here. **New content**

User #2 made a change here. **New content**

User #2 inserted an **annotation** here.

User #3 made a change here. **New content**

In this example, there are changes from three different users. Therefore, three different colors (red, green, blue) are used.

Added [AL]

Added [TR]

Annotation [TR]  
New annotation

Added [PS]



## TO USE THE FOLLOWING COLOR FOR ALL USERS

Select this option if you want all changes, regardless of the user, to display in the same color. After you choose this option, click the down arrow below to select a color.

In this example, there are changes from three different users. But the same color (in this case, red) is used to display all of the changes, regardless of the user.

**Colors for Different Users**

User #1 made a change here. **New content**

User #2 made a change here. **New content**

User #2 inserted an **annotation** here.

User #3 made a change here. **New content**

Added [AL]

Added [TR]

Annotation [TR]  
New annotation

Added [PS]

The screenshot shows a web editor interface with a DOM tree on the left and a main content area. The DOM tree shows a hierarchy of HTML elements: html, body, h1, p, p, p, p. The main content area displays four lines of text, each representing a user change. The text 'New content' is highlighted in red in each case. To the right of the text, there are four dashed red boxes representing annotations: 'Added [AL]', 'Added [TR]', 'Annotation [TR] New annotation', and 'Added [PS]'. A red line connects the 'New content' text in the fourth line to the 'Added [PS]' annotation box. A blue callout box with a black border points to the annotations, containing the text: 'In this example, there are changes from three different users. But the same color (in this case, red) is used to display all of the changes, regardless of the user.'

3. Click OK.

# Finding Changes

Supported In:



You can use navigation buttons in the Review ribbon to quickly navigate to the previous or next tracked change or annotation in the file.

## How to Find Changes

1. Open the document or topic.
2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 19.
3. Select **Review > Next Change** or **Review > Previous Change**.

# I Accepting or Rejecting Tracked Changes

Supported In:



You can right-click on tracked changes and use a context menu to accept or reject them individually. You can also use options in the interface to accept or reject each tracked change or all tracked changes in a file. The reject option also removes annotations.

When you track changes, every change to the document—along with the user who performed the change—will be stored in the document’s markup. When a change is accepted or rejected, all markup designating it as a change is removed. When all changes in the document are resolved, they will not contain any history of changes made and can be considered ready for output.

## How to Accept or Reject Tracked Changes

1. Open the document or topic.
2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 19.
3. You can perform any of the following tasks.

### **TO ACCEPT ALL CHANGES IN THE DOCUMENT**

Select **Review > Accept Change > Accept All Changes**.

## TO ACCEPT A SINGLE CHANGE

Do one of the following, depending on the part of the user interface you are using:

- **Ribbon** Click on the change you want to accept. Select **Review > Accept Change**.
- OR
- **Right-Click** Right-click on the change you want to accept. From the context menu, select **Accept [Type of Change]**.

## TO REJECT ALL CHANGES IN THE DOCUMENT


Select **Review > Reject Change > Reject All Changes**.

## TO REJECT A SINGLE CHANGE

Do one of the following, depending on the part of the user interface you are using:

- **Ribbon** Click on the change you want to reject. Select **Review > Reject Change**.
- OR
- **Right-Click** Right-click on the change you want to reject. From the context menu, select **Reject [Type of Change]**.

4. Click  to save your work.

 **NOTE** Tracked changes are visible only in the editor in Contributor. They are not visible when viewing any output created from the document (e.g., saving to HTML, XPS, or PDF files).

 **NOTE** This feature is not supported for MadCap Lingo review package (LIREV) files.

# Annotations

Supported In:



You can insert an annotation (comment) into a document. These annotations do not become part of the actual content, but rather are intended for internal use between you and others.

**This chapter discusses the following:**


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# I Inserting Annotations

Following are steps for inserting annotations.

## How to Insert an Annotation

1. Open the document or topic.
2. Highlight the content that you want to associate with the annotation, or place your cursor on it.

 **NOTE** Do not highlight more than one paragraph.

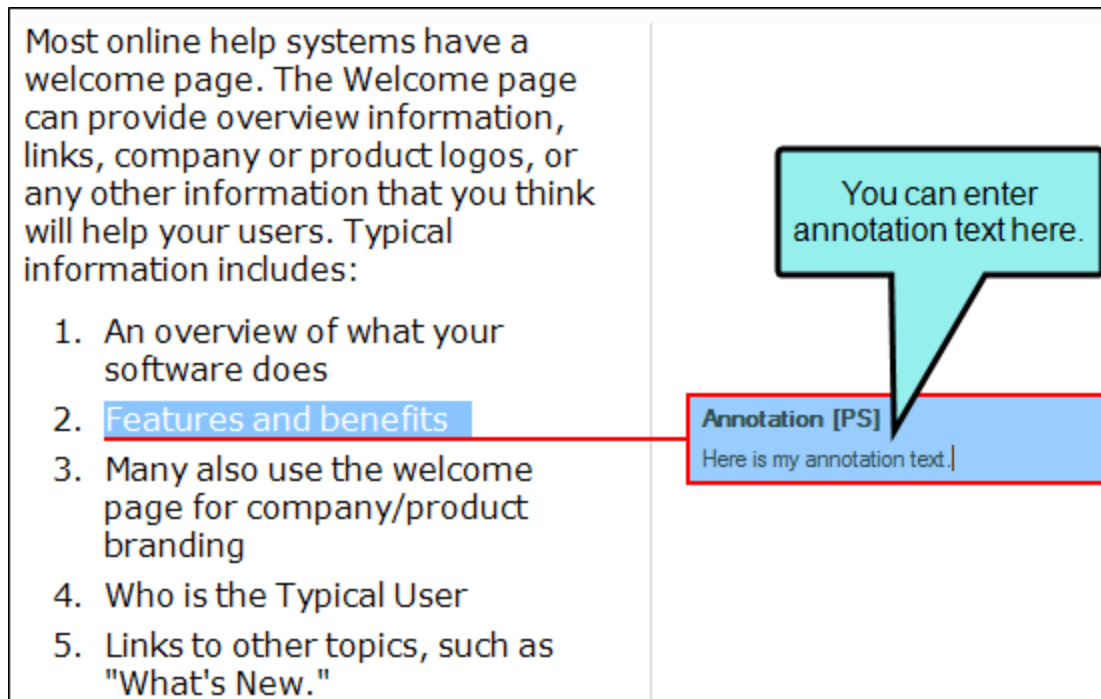
3. Do one of the following, depending on the part of the user interface you are using:

- **Ribbon Select **Review** > **Insert Annotation**.**
- **Right-Click** If the track changes feature is enabled, you can right-click and select **Insert Annotation**.

A rectangle extends to a sidebar on the right, with a line pointing to the selected content. This rectangle will hold the annotation text after you type it.

Also, the selected content is shaded, indicating that the annotation refers to that text. However, the shading will not be displayed in the output; it is for internal use only.

4. Type your comment in the annotation rectangle.




The screenshot shows a help system interface with a list of topics. The second item, "Features and benefits", is highlighted in blue. A red line connects this item to a blue annotation box on the right. The annotation box contains the text "Annotation [PS]" and "Here is my annotation text.". A light blue callout bubble points to the annotation box with the text "You can enter annotation text here.".


Most online help systems have a welcome page. The Welcome page can provide overview information, links, company or product logos, or any other information that you think will help your users. Typical information includes:

1. An overview of what your software does
2. **Features and benefits**
3. Many also use the welcome page for company/product branding
4. Who is the Typical User
5. Links to other topics, such as "What's New."

You can enter annotation text here.

Annotation [PS]  
Here is my annotation text.]


5. Click  to save your work.

 **NOTE** When you insert an annotation, your initials are displayed next to it. The initials are the first two letters of your login user name. However, you can change the user name and initials (for use in Contributor) to something else. For more information see the online Help.

# I Editing Annotations

You and other individuals can insert comments and notes next to content in a topic. Annotations do not become part of the actual content; they are simply comments for your internal use. You can easily make changes to an annotation.

## How to Edit Annotations


1. If you do not see annotations in the editor, select **Review > Show Changes**.
2. Click in the rectangle containing the annotation text and make your changes.
3. Click  to save your work.



# I Deleting Annotations

You can delete annotations that have been inserted into a document or topic.

## How to Delete Annotations


1. Open the document or topic.
2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 19.
3. Do one of the following, depending on the part of the user interface you are using:
  - **Ribbon** Select the annotation you want to delete. Select **Review > Delete Annotation**.
  - **Right-Click** Right-click on the annotation you want to delete, and from the context menu, select **Delete Annotation**.
4. Click  to save your work.

# Returning Documents to Authors

Supported In:




After reviewing documents sent from an author, you can return the documents in various ways. Work with the author to determine how he or she wants to be notified. If the author is using a built-in email feature, this might simply entail clicking **Return to Sender** in the Review Packages window pane (see below). Otherwise, you might need to manually inform the author via another method (e.g., email, chat).

 **NOTE** There is more than one way to transfer files between individuals using Flare and Contributor. For example, you can: (1) use the integrated email feature with Microsoft Outlook, (2) add files to SharePoint or External Resources where others can access them, or (3) save files to your computer (**File > Save**, then **Save As** or **Save To**) and then manually transfer them using some method (e.g., email). If you want to use the integrated email feature, you must have matching versions of Contributor and Outlook. If you are using 64-bit Contributor, you need 64-bit Outlook. Likewise, if you are using 32-bit Contributor, you need 32-bit Outlook.

# I How to Return Documents to Authors (via Built-In Email Feature)

The following steps include the integrated Outlook email method. If your systems are not set up for this feature, you can use one another method (e.g., or save to your computer and manually email).

1. Open the review package containing the documents you reviewed. If you do not see the Review Packages window pane, select **Review > Review Packages**.
2. In the local toolbar of the Review Packages window pane, click  **Return to Sender...**
3. In the email message, click **Send**.

# PDFs

The following PDFs are available for download from the online Help.

## I Cheat Sheets

*Shortcuts Cheat Sheet*

## I User Guides

*Getting Started Guide*

*Contributor Workflow Guide*

*Review Workflow Guide*

*What's New Guide*