

MADCAP FLARE ONLINE

Reviews Guide

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CHAPTER 1

Introduction

Flare Online supports an effective content review process when working with files from MadCap Flare Desktop. Files are bundled in a review package, which is essentially a container that can include as little as one or possibly hundreds of files (e.g., topics, snippets). Review packages can be sent from Flare Desktop to Flare Online, reviewed and modified, and individual files are accepted back into Flare Desktop. Once all the files by all the reviewers are reviewed, the owner closes the review package.

The streamlined review package workflow enables owners to assess the overall progress of it through grids. They can see recent activity, who's reviewing, status of files or packages, or even create new packages directly in Flare Online. Reviewers can open files for review, modify them in an editor, and submit the files within them to Flare Desktop. Files within a review package can be seen as a flat list of files or in a TOC view that provides context and general flow of content for output.

General Information

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 **NOTE** Since the review packages feature affects the reviews process between both Flare Online and Flare Desktop, be sure to check out Flare Desktop's Help system. Flare Desktop supports an efficient workflow for sending and receiving review packages back and forth with Flare Online.

 **NOTE** The latest version of the Flare Desktop application is required for sending review packages. Older versions of Flare Desktop support reviews but only for sending and accepting single files for review. Files will be brought into Flare Online as one-file packages. For example, if you have 10 files for review, they will be sent as 10 review packages—the files will not be bundled together as one package.

 **NOTE** If you plan to incorporate sending packages for review from Flare Desktop to Flare Online, the project first must be bound to Flare Online.

General Information for Reviews

There are various pieces of general information you should know if you plan to use this feature.

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I Benefits

Benefits of this review workflow include:

- **Cloud Review** SMEs do not need to download and install any software. The review takes place in the cloud.
- **Multi-User Editing** Multiple reviewers (e.g., SMEs, authors) can make changes and add comments to the same topic or snippet at the same time.
- **Review-Only Interface** A lightweight version of the editor means a streamlined interface. You only see options and features that are relevant to the review process.
- **Auto-Save and Tracking** Changes in the editor are auto-saved as you work. In addition, all changes are automatically tracked so the owner can easily locate edits for approval or rejection.
- **Branching** Files can be sent for review from a specific Git branch. This lets you keep reviews limited to files that are still in a state of development, as opposed to finished and ready for publication.
- **Workflow Management** Bundling files into review packages favorably services everyone in the review process workflow. Reviewers (e.g., SMEs) can edit and view content from a flat file list or from a contextual TOC view where files display in a TOC for output that an end user might see. Owners (e.g., authors) can edit but they can also monitor and manage reviews in Flare Online. They have access to customizable package and file grids that show review information and progress.

User Types for Reviews

The Flare Online review process involves owners (those originating the process) and reviewers (those making changes and comments in the review package files). Reviewers can be either authors or subject matter experts.

Owners are by default authors and therefore, can also be reviewers. And authors with the Manage Reviews permission can also interact with the data grids (i.e., packages, files) and make changes to review packages. Owners, however, are not required to have the Manage Reviews permission and can modify anything about a package or the files within it.

Inviting Reviewers

When you invite someone to join a Flare Online license, you can choose the user seat type for that person.

The screenshot shows the 'Invite User' form in Flare Online. The form is titled 'Invite User' and has a progress bar at the top with five steps: 1 Start, 2 User Info (Author), 3 Permissions, 4 Teams (Optional), and 5 Summary. The current step is 'User Info'. The form contains four input fields: 'User Seat Type *' (a dropdown menu with 'Author' selected), 'First Name *', 'Last Name *', and 'Email *'. There are 'Back' and 'Next' buttons at the bottom right.

- **Author** An author is an individual who works in projects, creating and editing content. This person can also be the "owner" of a review when they send topics and snippets that need to be reviewed by others. Owners can assign other reviewers with the author seat type and permission to manage reviews. Authors can monitor reviews, access grids for information and progress, and create review packages directly in Flare Online. Along with the reviewers, the author can open and edit files in the Review Editor. Authors with the appropriate permissions can send a project out for translation. They can also create and edit content in Flare Online via the project Workspace page.
- **Subject Matter Expert** A subject matter expert (SME) is an individual whose main purpose in Flare Online is to review topics and/or snippets sent by an author. Therefore, a SME only sees the parts of the Flare Online user interface that are necessary for reviews.

 **NOTE** A person who has the author user type can function as either the owner (i.e., original author) or a reviewer during the review process.

 **NOTE** What you see and interact with on the Reviews main page largely depends on your user type. For example, a subject matter expert (SME) is mainly exposed to packages for reviewing and editing, but an author has additional access to package and file grids, and can also create packages directly in Flare Online.

Reviews Main Page

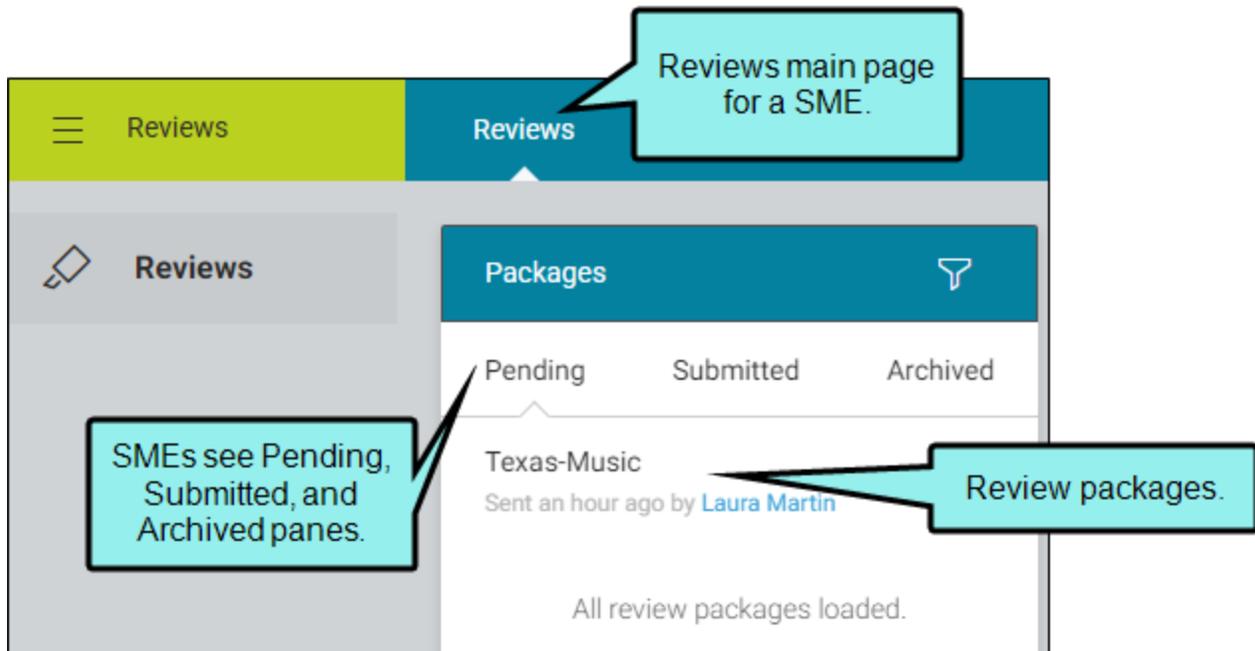
The Reviews main page is the gateway to accessing review packages in Flare Online.

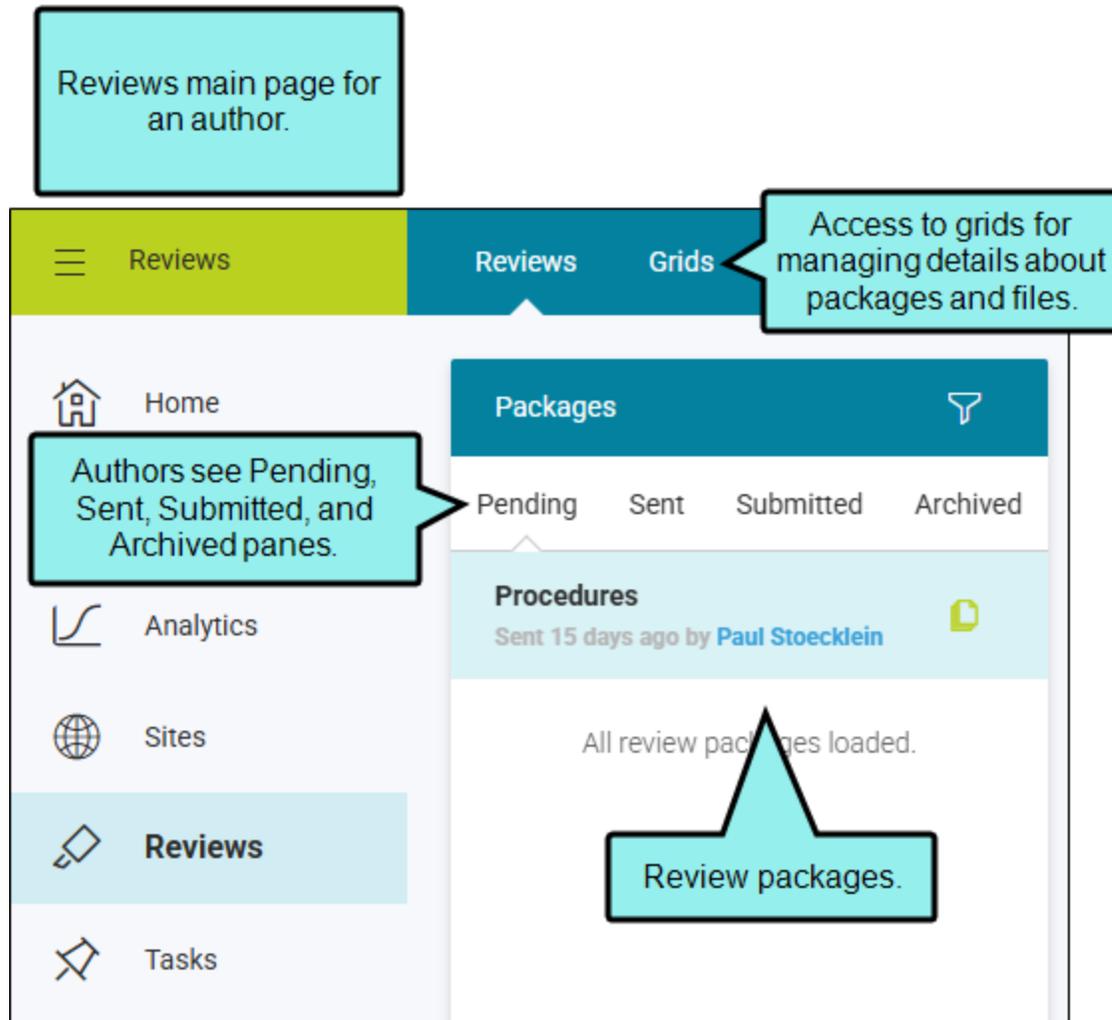
Review Explorer

What you see and interact with on the Reviews main page largely depends on your user type. For example, a subject matter expert (SME) is mainly exposed to packages for reviewing and editing, but an author has additional access to package and file grids, and can also create packages directly in Flare Online.

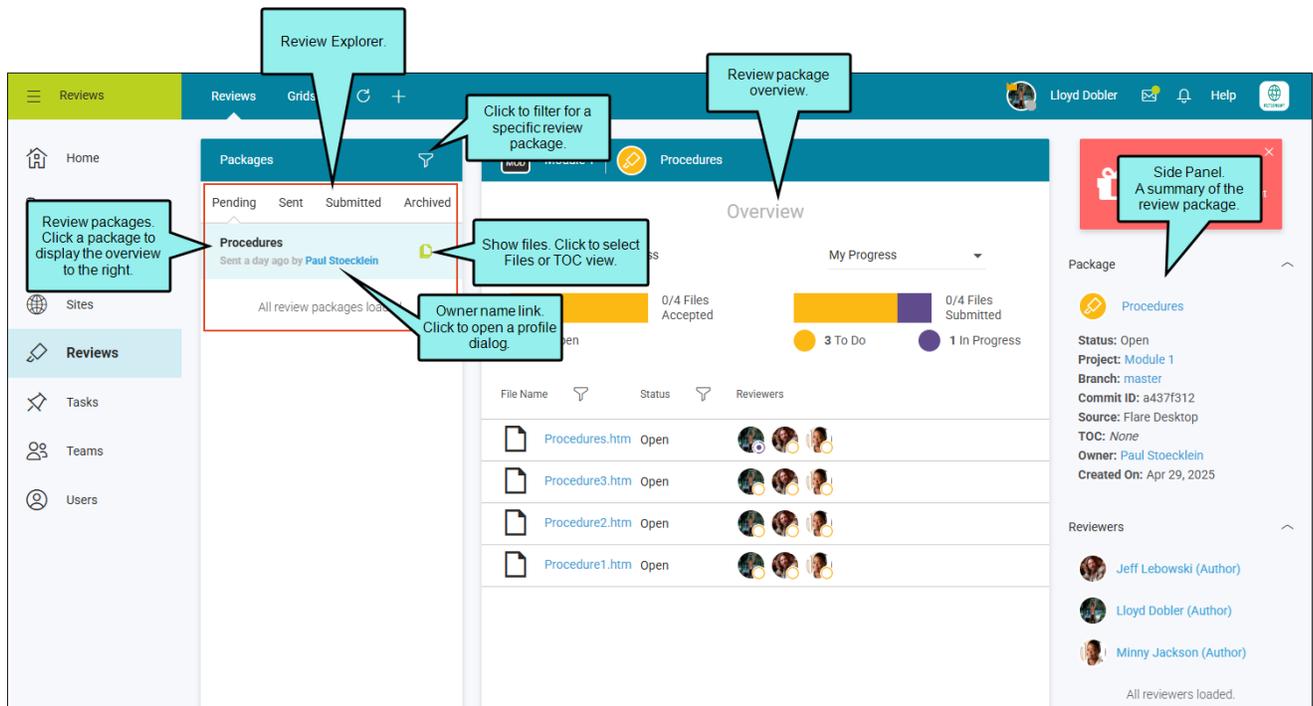
If you are the owner, the files are listed in the Sent pane. If you are a reviewer, the files are listed in the Pending pane.

- **Pending** This pane displays packages that the reviewer needs to review.
- **Sent** This pane displays packages that the owner has sent other for review.
- **Submitted** This pane displays packages that the reviewer has completed and submitted.
- **Archived** This pane displays packages that have been closed (by the owner). The files within them are read-only.





When you first click the Reviews main page, any uploaded packages that involve you display in the Review Explorer.



- If you click the review package, an overview page displays to the right with a chart, files, and statuses as they relate to a single package.
- If you click **Show files** , the Review Explorer changes, allowing you to toggle views between Files and Table of Contents (TOC). (If an owner chooses not to associate files with a TOC, then a TOC will not be applicable to your review package.) If you click a file, it displays in the Review Editor to the right.
- If you click the owner name link, a profile dialog opens with owner information.

 **NOTE** Authors have access to data grids for monitoring and managing review packages in Flare Online. From the top navigation select **Grids**. From there you can view the Packages grid all review packages in Flare Online, or you can view a Files grid which shows all files sent for review regardless of the package.

Review Packages Overview

As soon as you select a review package, you can see details right away in its overview. The ability to monitor and update review packages, the file(s) within a package, and reviewers, provides value and momentum to the review process.

1. On the left side of the interface, click **Reviews**.
2. From the Review Explorer, select a package. The review package overview opens to the right. From the review package overview you can immediately see analytics regarding review package files. It shows the state of the files, your status, and the status of other reviewers.

In this example, the owner monitoring progress of the review package.

Overall file progress that corresponds with the file grid below.

See the progress for all assigned reviewers.

At-a-glance reviewer status.

All of the reviewers have submitted the file. In Flare Desktop, the owner has closed the file for further review. When this occurs, a lock displays for the file.

File Name	Status	Reviewers
Features.htm	Open	LG, LD, [User]
Feature3.htm	Open	LG, LD, [User]
Feature2.htm	Closed	LG, LD, [User]
Feature1.htm	Open	LG, LD, [User]

This example displays a subject matter expert (SME) point of view. Review package files show with status indicators, and the package overview on the right.

The chart and SME reviewer file status correlate.

File Name	Status	Reviewers
Procedures.htm	Open	[User], LG, [User]
Procedure3.htm	Open	[User], LG, [User]
Procedure2.htm	Open	[User], LG, [User]
Procedure1.htm	Closed	[User], LG, [User]

NOTE If as an owner, you want your changes to be included (along with other reviewers progress) in the analytics of the review, then you need to add yourself as a "reviewer" to the review package. When this happens, the owner must submit the changes just like any other reviewer. The review package overview changes slightly.

In this example, the owner is assigned as a reviewer (to be part of the overview analytics).

File Name	Status	Reviewers
Procedures.htm	Open	[Reviewer 1] [Reviewer 2] [Owner]
Procedure3.htm	Open	[Reviewer 1] [Reviewer 2] [Owner]
Procedure2.htm	Open	[Reviewer 1] [Reviewer 2] [Owner]
Procedure1.htm	Closed	[Reviewer 1] [Reviewer 2] [Owner]

Review package files shown. Since the owner is a reviewer now, the status indicators display next to files.

Progress shown for the owner, who is also an assigned reviewer.

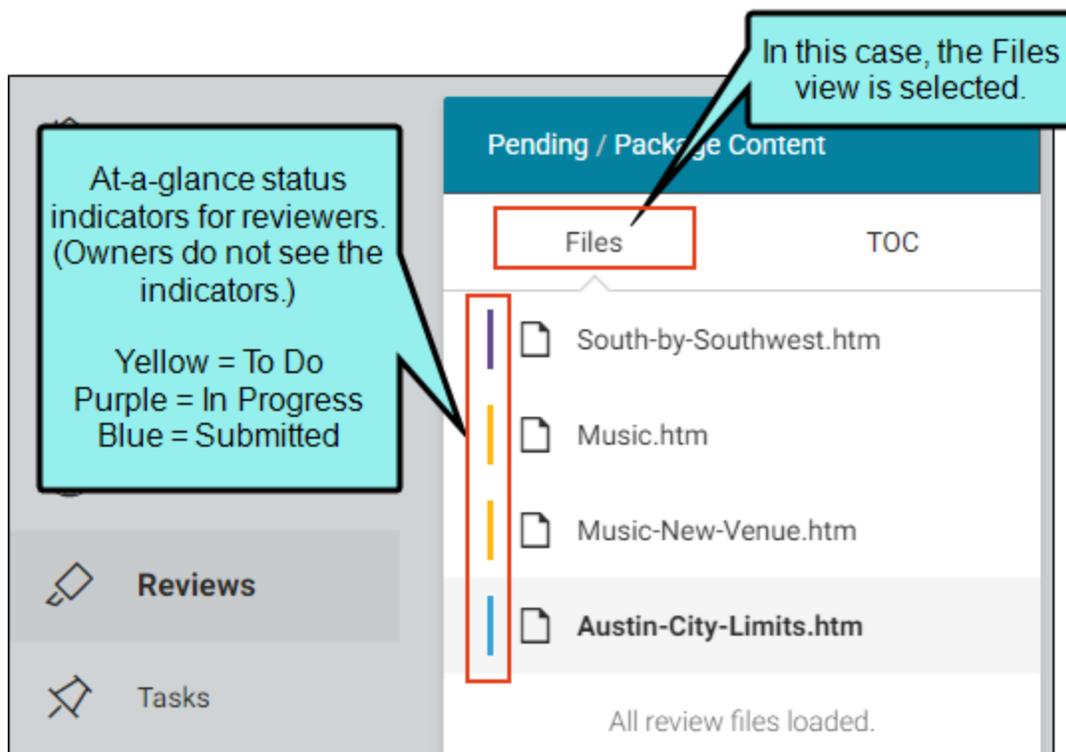
Owner status added to analytics.

NOTE An author, who is also the owner of a review, can modify anything about a package or the files within it even if they do not have the Manage Review permission.

How to Toggle Files View and TOC View

Reviewers have the option to see individual files in a list or in a TOC view for review. The Files view means that you see a list of flat files. The TOC view, on the other hand, provides more context for content and a general flow of materials. The TOC view caters to the perspective of the end user since files are assembled as they would display in a TOC for output.

1. On the left side of the interface, click **Reviews**.
2. From the Review Explorer, select **Show files**  from the desired package.
3. The pane changes to show the contents of the package. Select **Files** or **TOC** at the top for your preferred view.



In this case, the TOC view is selected. Notice the TOC structure. Files not included in the review package appear dimmed.

Pending / Package Content

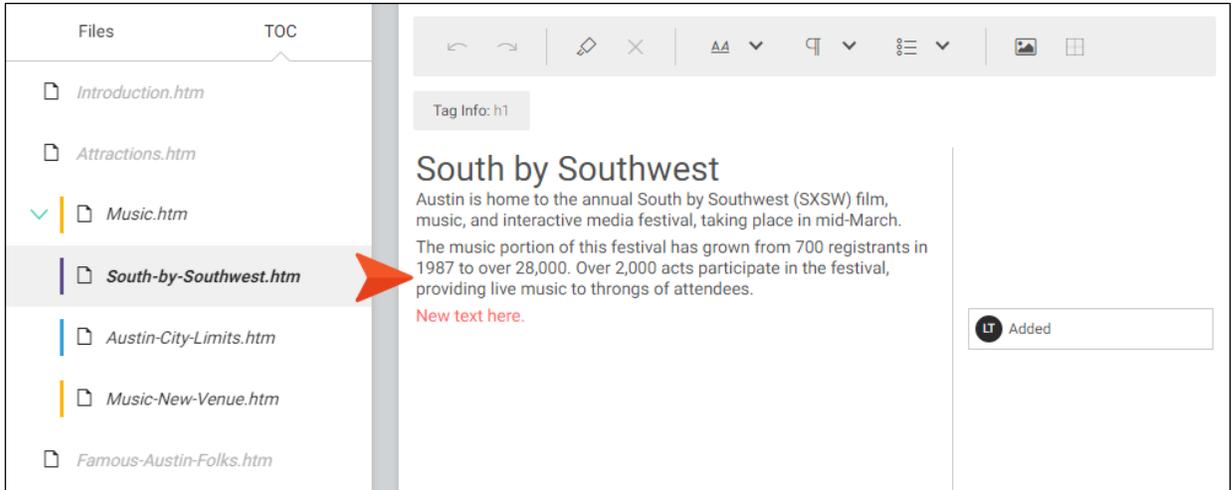
Files TOC

- Introduction.htm
- Attractions.htm
- ✓ Music.htm
- South-by-Southwest.htm
- Austin-City-Limits.htm
- Music-New-Venue.htm
- Famous-Austin-Folks.htm

 **NOTE** Topics and snippets can be included in a review package. Topics display in both views, but snippets only display in the Files view. Snippets do not display in the TOC view.

 **NOTE** Flare Online's TOC view shows a label if it is entered manually into the TOC (i.e., in Flare Desktop, the label displays in black font). But, if you use a variable for a TOC node (i.e., you dragged the topic from the Content Explorer to the TOC and it displays in blue font), then Flare Online shows the file name. The variables will display appropriately in the output. You can hover over the file name in the TOC view in Flare Online, and it should show the variable.

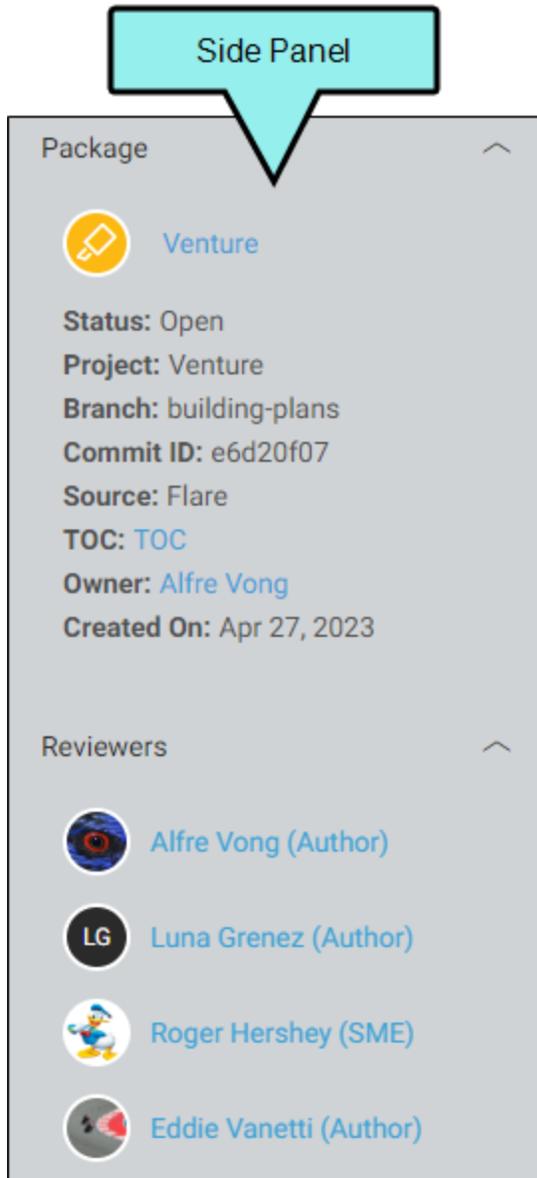
4. Select a file. It displays in the right side for reviewing and editing.



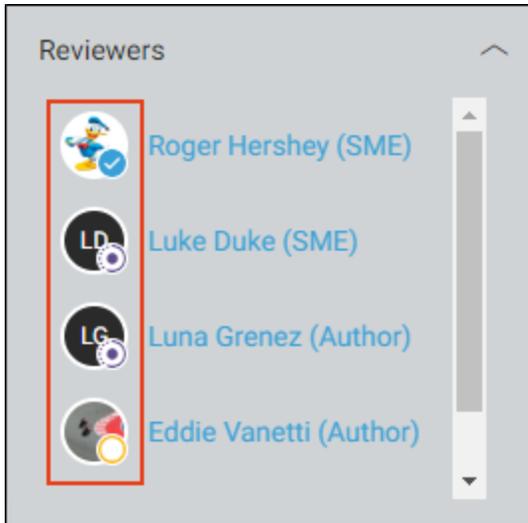
The screenshot displays the Flare Online interface. On the left, a 'Files' sidebar lists several HTML files: *Introduction.htm*, *Attractions.htm*, *Music.htm*, *South-by-Southwest.htm*, *Austin-City-Limits.htm*, *Music-New-Venue.htm*, and *Famous-Austin-Folks.htm*. The file *South-by-Southwest.htm* is selected, highlighted in grey, and has a red arrow pointing to it. The main content area on the right shows the rendered output for this file. At the top, there is a 'Tag Info: h1' label. Below it, the main heading is 'South by Southwest' in a large, bold, blue font. The body text reads: 'Austin is home to the annual South by Southwest (SXSW) film, music, and interactive media festival, taking place in mid-March. The music portion of this festival has grown from 700 registrants in 1987 to over 28,000. Over 2,000 acts participate in the festival, providing live music to throngs of attendees.' Below the text, there is a red line indicating 'New text here.' On the right side of the content area, there is a small box with the text 'LT Added'.

Review Package Side Panel

When a package is selected for review, use the right Side Panel of the interface to see at-a-glance review package information. It references package status, project, branch, commit ID, TOC (if applicable), owner, and the creation date of the package. Under that is a list of the reviewers associated with the file in the package.



 **NOTE** When a reviewer has a file open for editing in the Review Editor, the Side Panel displays status indicators for all reviewers. This means that each reviewer can see the progress of other reviewers for the file.



Viewing Status

Virtually every component in Flare Online reviews captures some sort of status. For example, status is reflected in the Review Explorer, the package overview, the right Side Panel, the grids, and the profiles. It ranges from what state the package is in, the overall status of all files in a package, to the individual reviewer status and where they are with a given file. Flare Desktop and Flare Online work together to maintain the current state of files in a review package to their respective environments; giving momentum to the review process.

Statuses can be seen in different places of the user interface, but status meanings are consistent throughout reviews pages and dialogs.

Review Package Statuses

- **Open** The review package is open for review. This is the default setting.
- **Closed** All files in the package are set to a closed status (i.e., the package can no longer be reviewed). This can be set in the Review Package profile to put a review back into Flare Desktop's inbox as is (i.e., the review is not complete) and archive the review at the same time.

Review File Statuses

- **Open** The file is open for review. This is the default setting.
- **Closed** The file is closed for review.
- **Accepted** The file is accepted in Flare Desktop.

Reviewer Statuses

- **To Do** The reviewer has not started editing the file yet. The status color is yellow.
- **In Progress** The reviewer has started editing the file, but has not submitted it. The status color is purple.
- **Submitted** The reviewer has edited the file and submitted it. The reviewer can still edit the file until the owner closes it. The status color is blue.

I Review Workflow

The Flare Online review packages workflow involves a combination of activities between the owner originating the process and all reviewers making changes and comments in the files.

1. **Owner** In Flare Online, open the **Users** page and invite the reviewer(s) to Flare Online.
2. **Reviewer** Click the link in the email to accept the invitation and set a password.
3. **Owner** In Flare Desktop, switch to the appropriate branch (if necessary), select **Review > Send For Review**. The first screen of the Send Files for Review Wizard opens.
 - a. In the **Review Package Name** field, enter a name.
 - b. (Optional) Enter a description for the review package.
 - c. (Optional) Add or remove files for the package.
 - d. (Optional) The TOC drop-down defaults to **(none)**. To associate files within a review package to a TOC in the project, select a TOC.
 - e. Click **Next**.

Send for Review | File Reviews | Import Review Package | Review Packages | Track Changes | Accept Change | Reject Change | Changes | Previous Change | Next Change | Insert Annotation | Delete Annotation

Send Files for Review Wizard

Send Files for Review...

Select files to send for review...

Review Package Name: Enterprise-Intro

Review Package Description: Introduction topics for the enterprise project.

Files:

Name	Folder
Getting-Started...	Content/A-Introduction...
More-Informat...	Content/A-Introduction...
Whats-New.htm	Content/A-Introduction...

TOC: (none)

< Back | Next > | Send | Close

Annotations:

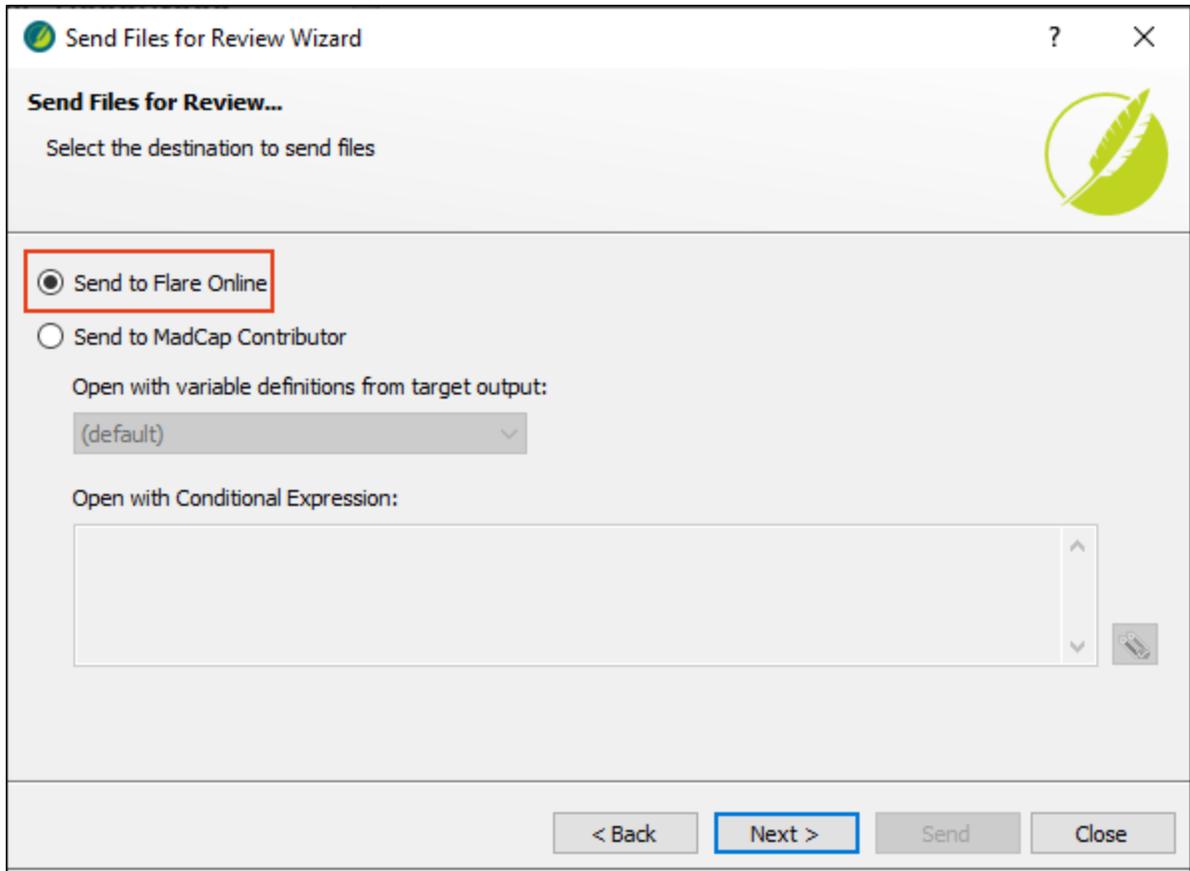
- TOC picker. Opt to select a TOC. (points to Content Explorer)
- Add or remove files using these buttons. (points to + and - buttons)

✔ **TIP** All snippets that are part of a topic will initially be included in the review. However, when sending files for review from Flare Desktop, you can remove any snippets from the File grid to exclude them from the review. You might choose to exclude some (or all) snippets from the review if you think it will be too confusing and too many files for your reviewers. If you exclude snippets, they will still be visible in the topic in Flare Online, but the snippets will be read-only. Therefore, reviewers won't be able to make edits in the snippets, but in the topic they can insert annotations (comments) around the snippets in order to provide feedback.

📄 **NOTE** If you are using Git branching, make sure the appropriate branch is active. When you send files for review, they will be associated with that branch.

In Flare Online, reviewers can determine which branch a file is from. Reviewers do not need to do anything special to make edits or comments in the files.

4. **Owner** Select **Send to Flare Online** (if not already selected), and click **Next**.



 **NOTE** If necessary, Flare Desktop also prompts you to commit and synchronize any changes in your project with Flare Online before you can proceed to the next page of the wizard.

5. **Owner** (Optional) Select reviewers for the review package, and click **Send**. The wizard closes and a prompt alerts you that the files have been sent to Flare Online, click **OK**.

The owner can choose reviewers of different seat types, such as authors and SMEs. Anyone selected during this process automatically becomes associated with the project in Flare Online, and becomes an assigned reviewer for all files chosen in the wizard.

Send Files for Review Wizard ? X

Send Files for Review...

(Optional) Select users to review the files



Branch: master

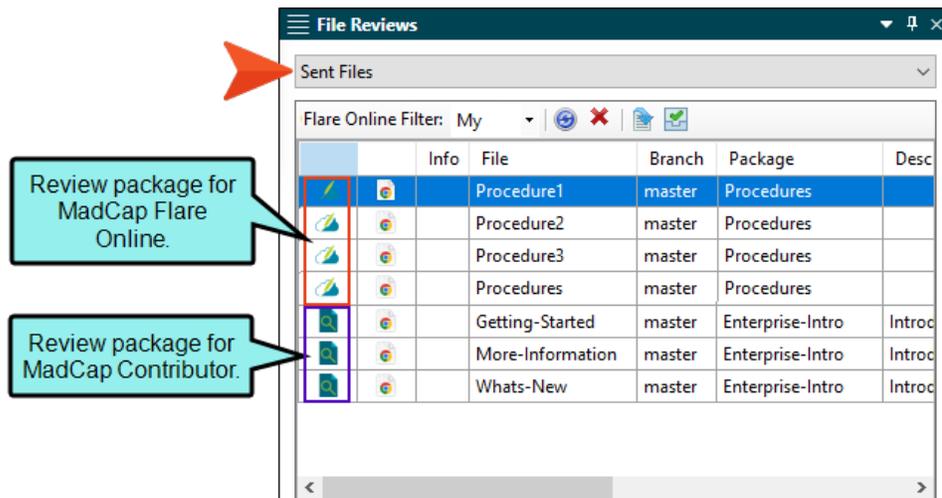
Reviewers

	Avatar	Name	Email	
<input checked="" type="checkbox"/>		Paul Stoecklein	pstoecklein@...	
<input type="checkbox"/>	LM	Laura Martin	lmartin@madc...	
<input checked="" type="checkbox"/>		Lloyd Dobler	ldobler@ahem....	
<input checked="" type="checkbox"/>		Jeff Lebowski	jlebowski@ah...	
<input type="checkbox"/>		Beatrix Kiddo	bkiddo@ahem....	
<input type="checkbox"/>		Minny Jackson	mjackson@ah...	
<input type="checkbox"/>		Marge Gunders...	mgunderson@...	
<input type="checkbox"/>		Ella Fitzgerald	efitzgerald@ah...	
<input type="checkbox"/>		John Harkins	jharkins@mad...	

< Back Next > **Send** Cancel

After the review package is uploaded, reviewers receive an email notification with a link to open the Reviews page in Flare Online. (SMEs automatically receive email notifications, but Flare authors must have the review notifications and email option enabled in Flare Online to receive emails.)

In File Reviews, the review package files display in the Sent Files area. This means the files are in an “Open” state, pending review.



NOTE If you attempt to edit a file that has been sent out for review and is still in an “Open” state, a warning displays. You can edit the file, but you may have conflicts with the version of the file being reviewed. As an alternative to editing the file in Flare Desktop, you can edit it in Flare Online along with your reviewers until it is finished.

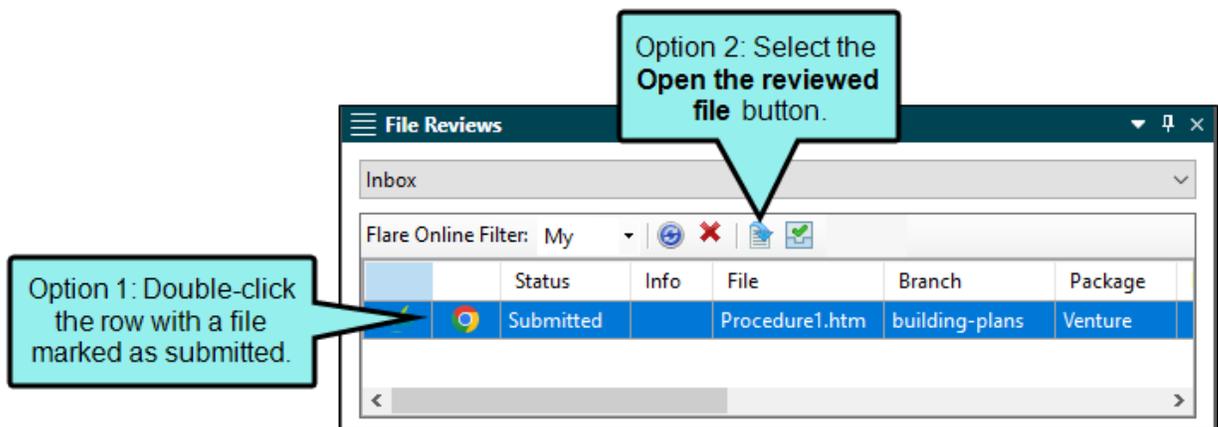
- Reviewer** In Flare Online, open the Reviews page. Click each file associated with the pending review package and edit or annotate it using the Review Editor, and click **Submit**.

The reviewer is done submitting once all the files in the queue are complete. This moves the review package to the Submitted pane. Files can be viewed from there and edited still, but once the owner closes the file, it can no longer be edited in Flare Online.

After all of the reviewers submit the file(s), the owner receives an email notification (if notifications are enabled in Flare Online) and the file(s) displays in the File Reviews Inbox in Flare Desktop.

 **NOTE** If the owner of a review package makes edits to the files in Flare Online they will not typically see a Submit button. If as an owner, you want your changes to be included (along with other reviewers progress) in the analytics of the review, then you need to add yourself as a "reviewer" to the review package. When this happens, the owner must submit the changes just like any other reviewer.

7. **Owner** After reviewed files are individually submitted from Flare Online, open Flare Desktop. Select **Review > File Reviews**. You can look at files as they come in; you do not have to wait for all the files in a review package in order to preview them.
8. **Owner** From the File Reviews Inbox area double-click a submitted file. (Or, select a file, and from the local toolbar, click **Open the reviewed file** .)

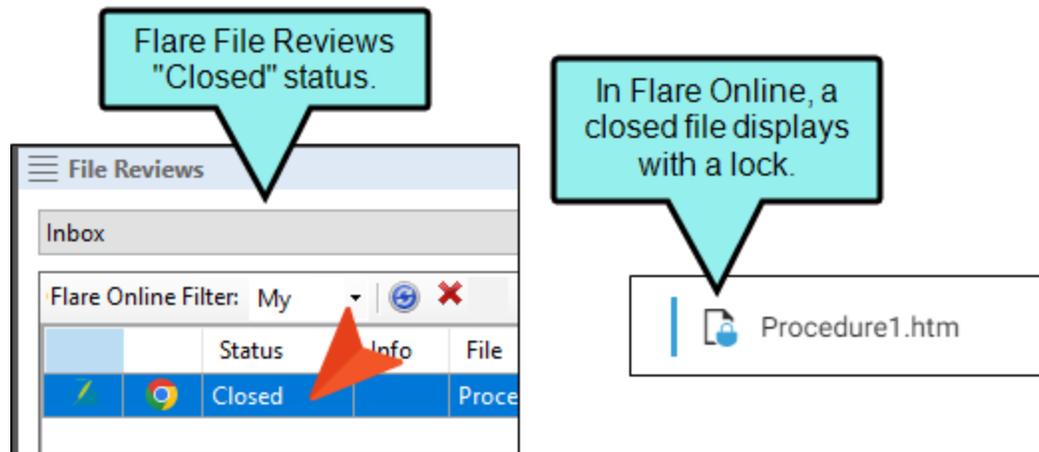


 **NOTE** The Inbox displays files from all relevant branches (if you are using Git branching). You should switch to the matching branch before managing the tracked changes and accepting the file back into Flare Desktop.

 **NOTE** Any authors working in that project can close the review file. This is necessary in case the owner (i.e., original author) is not available to close it.

9. **Owner** When you click to open and preview a file, a dialog displays asking if you want to move the files to a closed state. Select **Yes** or **No**.

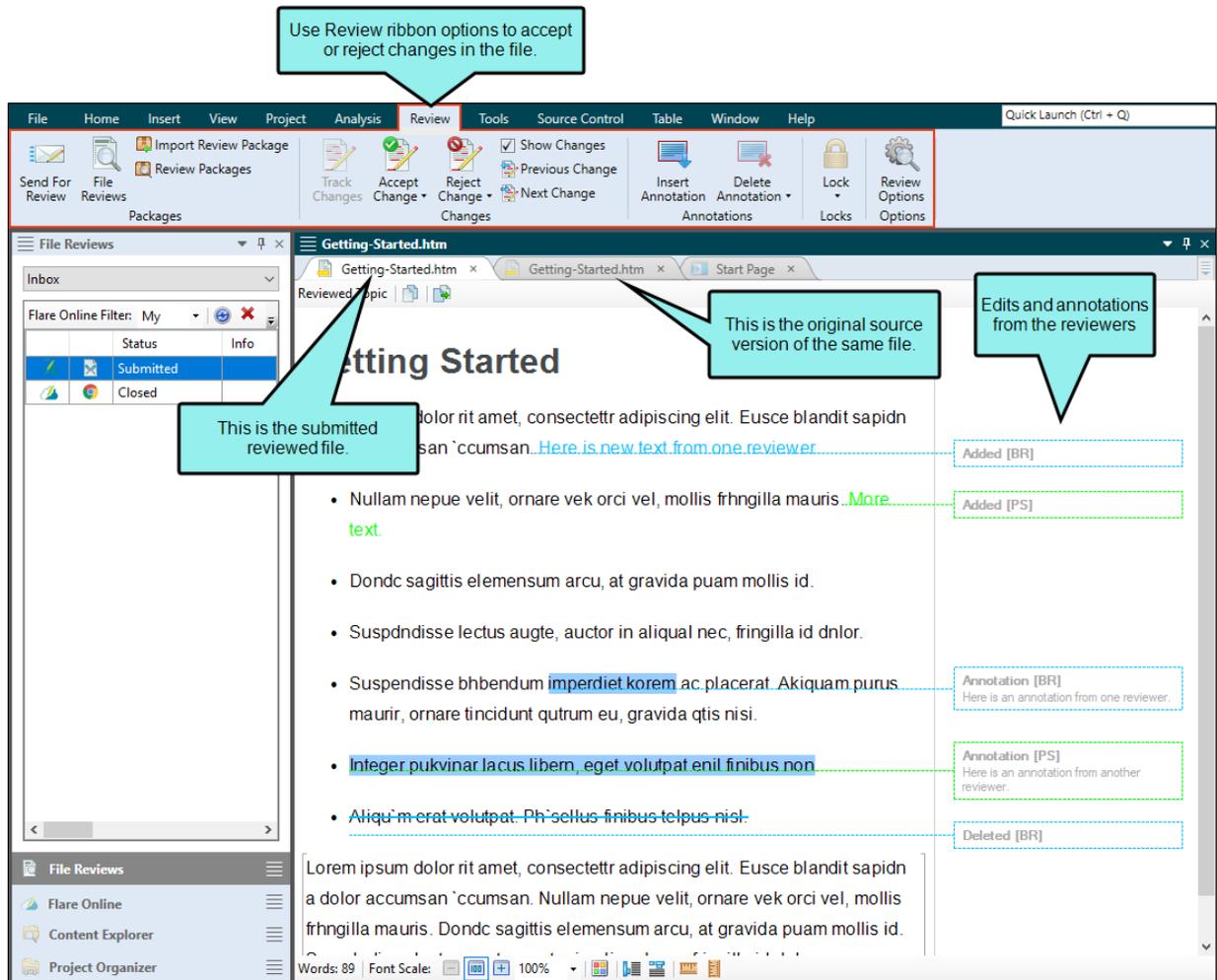
- **Yes** The file switches to a closed state in the Inbox and opens in the editor. No more editing can occur in Flare Online while the owner reviews it. In Flare Online, when a file is closed, a lock symbol appears next to the file.



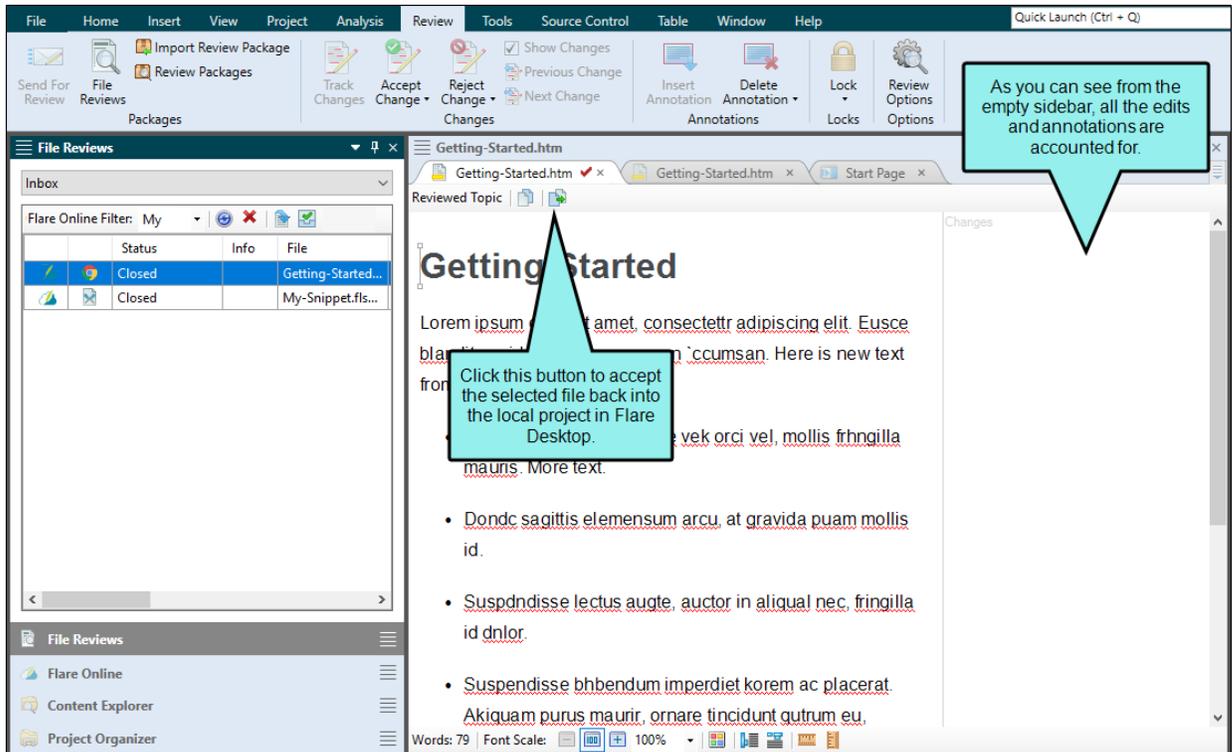
- **No** The owner can preview the file in Flare Desktop—as a read-only file. The reviewer(s) can still make changes to the file in Flare Online until the owner closes the file in Flare Desktop. The file stays in a submitted state in the Inbox, and it opens in the editor.

NOTE The advantage of this is that you can see raw edits before the reviewer is done—without having to close the file and resend it from Flare Desktop. When you are ready to close out the file from further editing, double-click the submitted file and select **Yes** from the prompt.

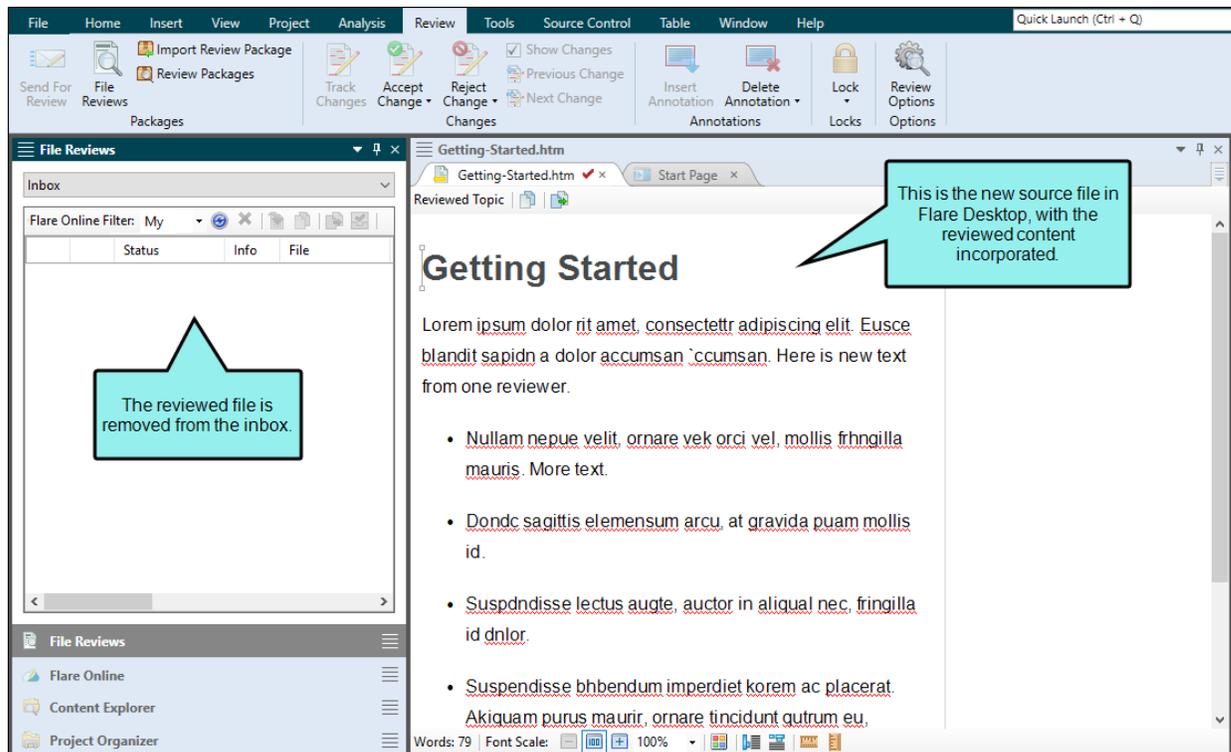
10. Owner In Flare Desktop, accept and/or reject the reviewer's changes in the editor.



11. **Owner** In the toolbar in Flare Desktop, click the **Accept** button.



The file is then removed from the Inbox.



What's Noteworthy?

 **NOTE** You can also initiate the review process in Flare Online directly. This might be more convenient if you are already working in Flare Online.

 **NOTE** For the review process, keep in mind that review packages are sent up, and files come down. In other words, owners are sending review packages up to Flare Online, and then reviewers are submitting individual files back down to Flare Desktop. The advantage to this is that you can look at files as they come in; you do not have to wait for all the files in a review package in order to review them. Once all package files are accepted into Flare Desktop, the review package is closed.

CHAPTER 3

Main Activities for Reviews

Some activities are particularly common and important when it comes to this feature.

This chapter discusses the following:

- Opening Reviews 36
- Editing Review Files 45
- Submitting Review Files 94
- Setting Notifications for Reviews 96

I Opening Reviews

Opening review packages containing files sent for reviews is quite simple, but keep in mind that there are multiple panes that display on the Reviews main page.

Permission Required?

Reviews do not require permission to partake in them. However, managing and creating review packages in Flare Online does require the Manage Reviews permission.

How to Open a Review Package

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Reviews**.
3. From the appropriate **Packages** pane (e.g., Pending, Sent), select the row of the desired review package.

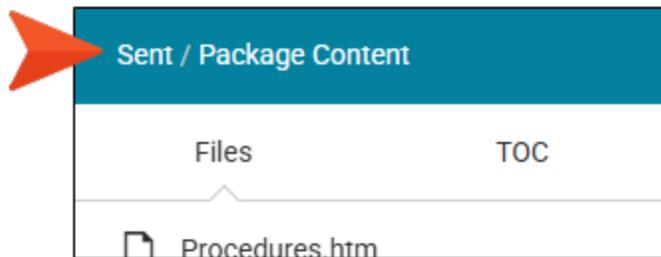
 **TIP** Use the filter to search for a specific review package. This might come in handy if you have many review packages listed in the Review Explorer.

How to Open a File in the Review Editor

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Reviews**.
3. From the appropriate **Packages** pane (e.g., Pending, Sent), select a package:
 - If an owner has sent a package to you for review, open it from the **Pending** pane.
 - If you are the owner, you can open a package from the **Sent** pane. You might do this if you want to continue editing the file after you have sent it to others for review. Editing it in Flare Online might be preferable to editing it in Flare Desktop at this point; otherwise, you would have to resolve your changes with those from reviewers when you bring the file back into Flare Desktop.
 - If you are a reviewer who has already submitted a file, you can open it from the **Submitted** pane. You might do this if you remember something you wanted to edit after submitting it. You can access the file in this pane until the owner closes out the review process.

A package overview opens to the right.

4. From the selected review package in the Review Explorer, select **Show files** . At the top of the pane, notice the clickable breadcrumb navigation.



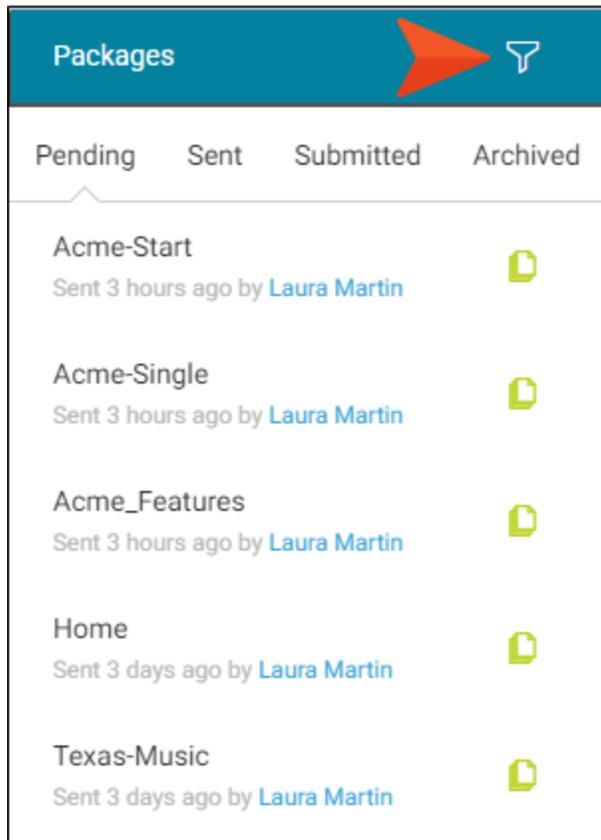
5. Select **Files** or **TOC** at the top for your preferred view. If an owner chooses not to associate files with a TOC, then a TOC will not be applicable to your review package.
6. Select a file. It displays in the Review Editor to the right.

 **NOTE** Keep the following in mind when loading files:

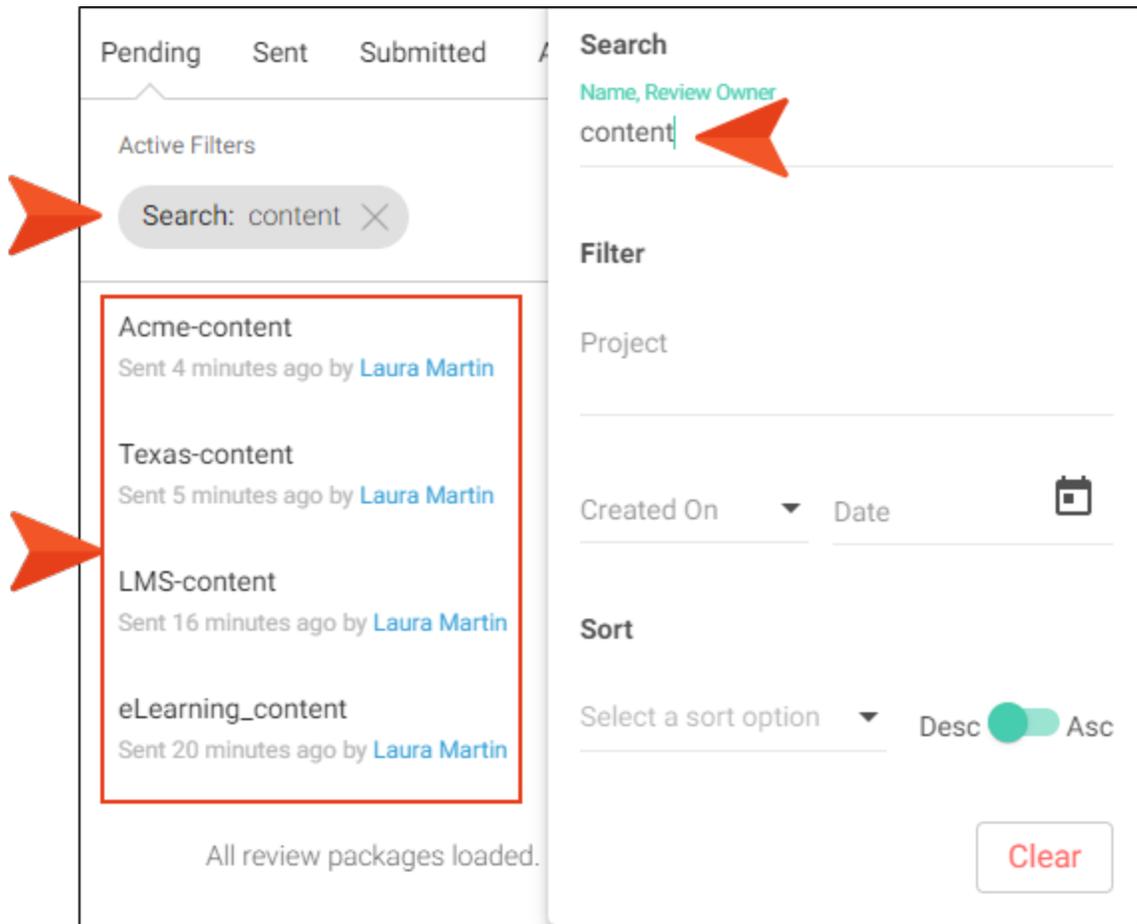
- The file size limit is 5 MB. This limitation helps prevent issues.
- If changes approach the limit, a message warns you.
- If edits exceed the size limit, reviewers are given the opportunity to undo edits or revert the changes and return to the previous saved version of the file.
- If an author sends a file for review that already exceeds the limit, a reviewer cannot load that file in Flare Online. To resolve the issue, the author can close the review file in Flare Desktop (in the File Reviews window pane), adjust the content to lower the file size, and then resend the file for review.

Filtering Review Packages

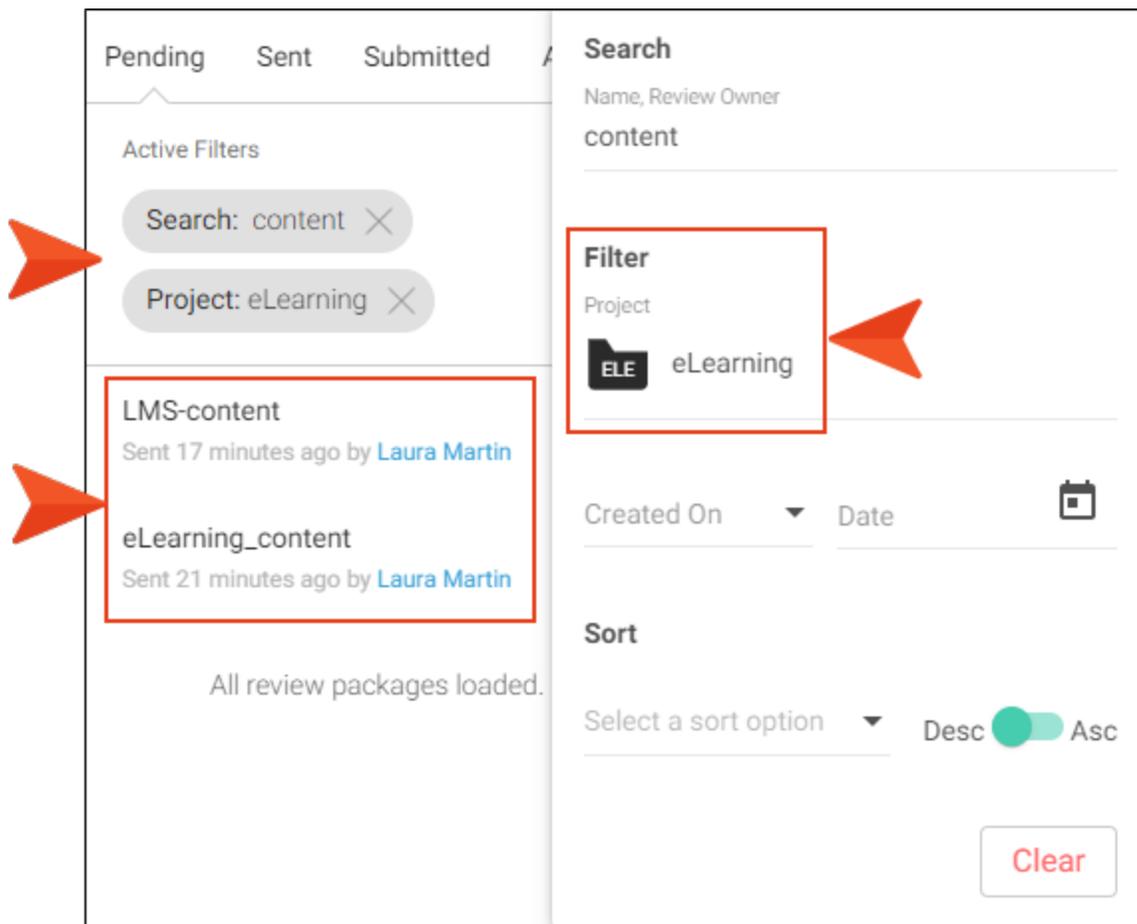
If you have a really long list of review packages shown, you can use a filter option to truncate the list to easily find what you need.



Within the dialog, you can begin typing in the **Search** field. This quickly adjusts the pane to the left, displaying only the packages that contain a name, or review owner matching the search text. In addition, the active filter is added at the top; you can click the X to clear that filter.



The first field in the **Filter** section lets you quickly select particular projects to limit the results even more. The active filter at the top of the window pane adjusts automatically.

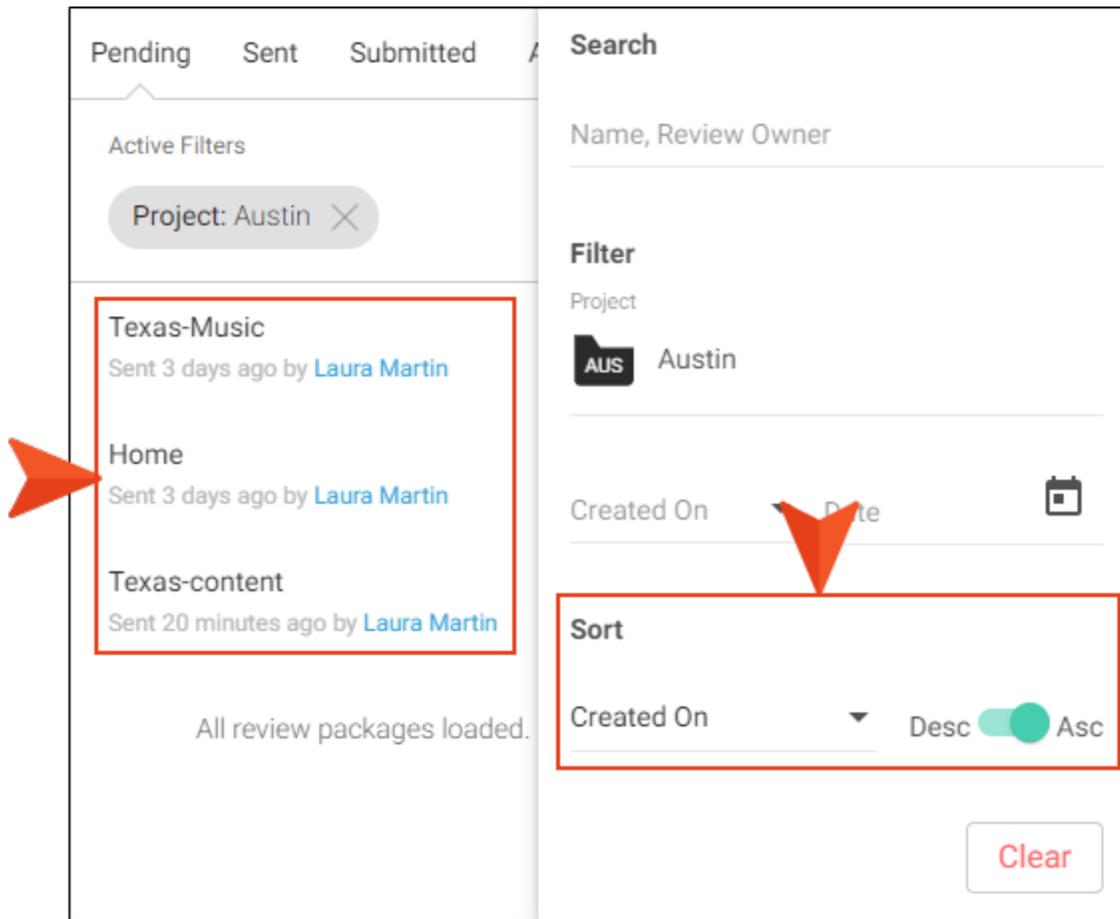


You can also select a date related to the sent date for review packages.

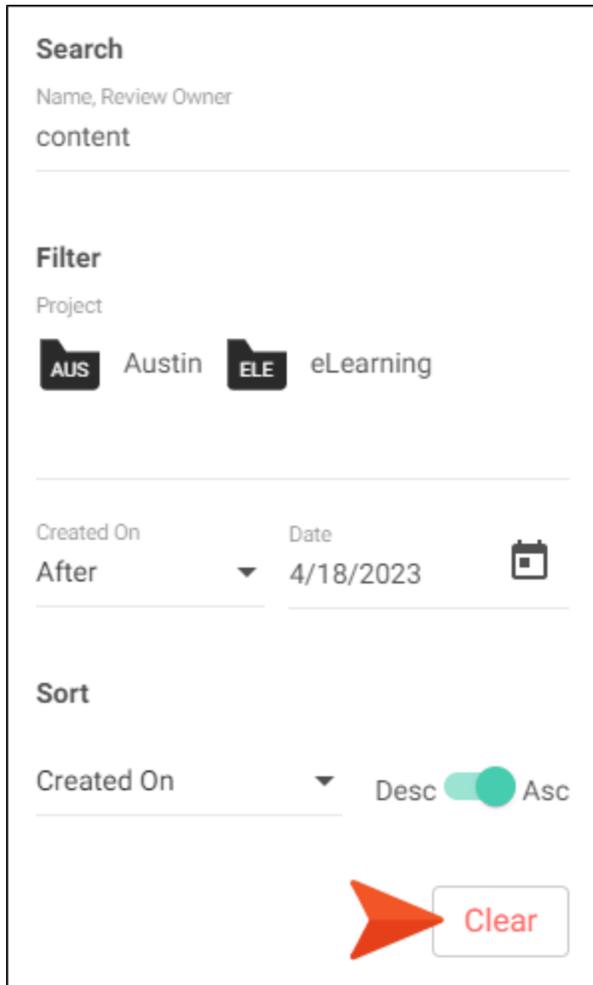
- **Created On** Shows packages created on the specific date selected.
- **Before** Shows packages sent before the specific date selected.
- **After** Shows packages sent after the specific date selected.

The screenshot shows a user interface for filtering review packages. On the left, there are tabs for 'Pending', 'Sent', and 'Submitted'. Below these, an 'Active Filters' section shows a filter: 'Created On: Before Apr 19, 2023'. Two red arrows point to this filter. Below the filters, a list of review packages is shown, with two items highlighted by red boxes: 'Home' (Sent 3 days ago by Laura Martin) and 'Texas-Music' (Sent 3 days ago by Laura Martin). Below the list, it says 'All review packages loaded.' On the right side, there is a 'Search' section with a text input 'Name, Review Owner'. Below that is a 'Filter' section with a 'Project' input. A red arrow points to the 'Created On' filter dropdown, which is currently set to 'Before' and '4/19/2023'. Below the filter is a 'Sort' section with a dropdown 'Select a sort option' and a toggle switch for 'Desc' (checked) and 'Asc'. A 'Clear' button is at the bottom right.

You can use the **Sort** section to organize the list of packages by None, Name, or Created On. Also, a toggle option also lets you sort the list in descending or ascending order.



A button at the bottom lets you clear all of the filter settings.



The image shows a filter settings dialog box with the following sections:

- Search**: Labeled "Name, Review Owner" with the text "content" entered in the search field.
- Filter**: Labeled "Project" with two folder icons: "AUS Austin" and "ELE eLearning".
- Created On**: A dropdown menu set to "After" and a date field set to "4/18/2023" with a calendar icon.
- Sort**: A dropdown menu set to "Created On" and a toggle switch between "Desc" (selected) and "Asc".
- Clear**: A red arrow icon pointing to a button labeled "Clear".

When you are finished setting options, just click off the dialog.

I Editing Review Files

Editing the files sent to a reviewer is the crux of the review process between Flare Desktop and Flare Online. From the Review Editor, all the reviewer needs to do is click to show files from the relevant review package, select an active file, and then edit and make annotations in the Review Editor. In addition, multiple people can edit a file at the same time, so you can see their changes in real time.

Permission Required?

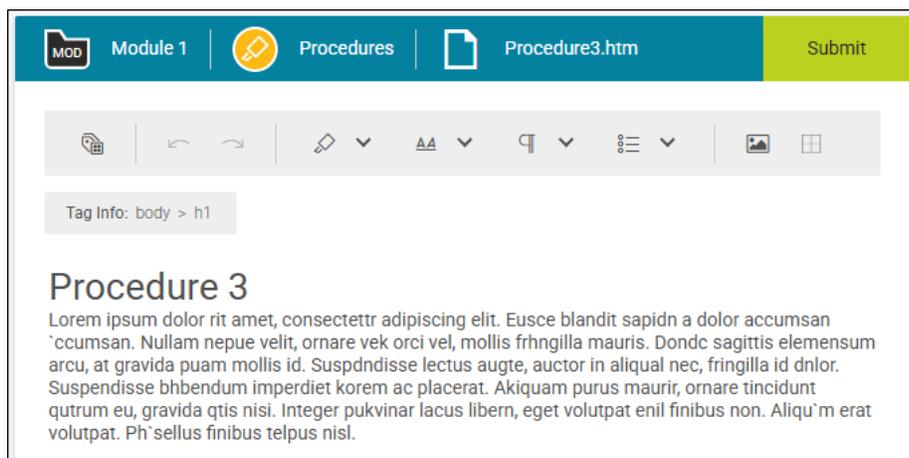
No special permission is required for this activity. All users who are associated with the review process for the specified file are allowed.

Review Editor

All reviewers associated with a review can view and interact with the Review Editor, but depending on the user seat type and permissions, the editor enables or restricts functionality accordingly.

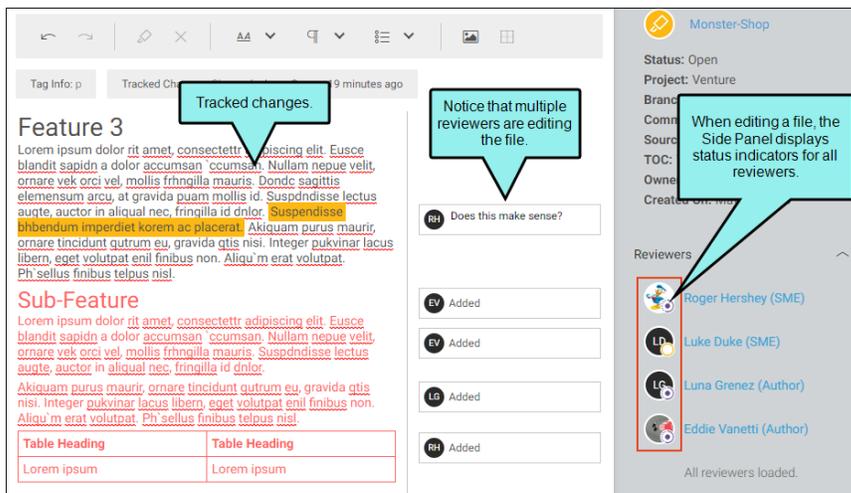
For example, an author who is also the owner of the review package can edit files, and those files save automatically—without having to submit an edited file (at the top of the editor). But for an author or a subject matter expert (SME) who has been sent a file to review, then a Submit button displays. In addition, the other elements in the banner (e.g., project icon, review package icon, review package link, content file link) are interactive for an author but not for a SME.

 **NOTE** If as an owner, you want your changes to be included (along with other reviewers progress) in the analytics of the review, then you need to add yourself as a "reviewer" to the review package. When this happens, the owner must submit the changes just like any other reviewer.



How to Edit a File

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Reviews**.
3. From the appropriate **Packages** pane (e.g., Pending, Sent), find the relevant review package, and select **Show files** .
4. Select **Files** or **TOC** at the top for your preferred view. If an owner chooses not to associate files with a TOC when initially sending a review, a TOC will not be applicable to your review package.
5. Select a file. It displays in the Review Editor to the right.
6. Start editing the file. For example, you can add or delete text, add bulleted lists, add images, add tables, bold text, create annotations, etc.



As you edit notice that all changes are tracked and auto-saved as you work.

7. When you are done editing the file, select **Submit** at the top of the editor.



NOTE When you click Submit, you are not submitting all the files associated to a review package, but you are submitting only that one file. Once you submit a file, it moves to the Submitted pane in the Review Explorer and the owner is notified to accept it back into Flare Desktop. Until the owner closes the file, you can reopen the submitted file and make more changes to it if necessary.

What's Noteworthy?

 **NOTE** In addition to typing, you can copy and paste content. When you paste content into the editor, any styling is removed. The pasted content will take on the style of the content where it was pasted.

 **NOTE** Aside from a few basic tags available in the toolbar (B, I, U, P, H1-H6, and lists), you cannot apply styles to a file that is being reviewed. You can only edit the content. Also, the files will not look exactly like your source files because the formatting from your stylesheet is not rendered in this editor.

 **NOTE** Keep the following in mind when loading files:

- The file size limit is 5 MB. This limitation helps prevent issues.
- If changes approach the limit, a message warns you.
- If edits exceed the size limit, reviewers are given the opportunity to undo edits or revert the changes and return to the previous saved version of the file.
- If an author sends a file for review that already exceeds the limit, a reviewer cannot load that file in Flare Online. To resolve the issue, the author can close the review file in Flare Desktop (in the File Reviews window pane), adjust the content to lower the file size, and then resend the file for review.

Review Editor Toolbar

You can use the options in the toolbar at the top of the Review Editor to accomplish different tasks.

Option	Description
	<p>Shows or hides colored shading (and in some cases a colored square) where conditions have been applied.</p> <div data-bbox="716 527 1442 947" style="border: 1px solid purple; padding: 10px;"><p>☆ EXAMPLE Your condition has blue associated with it and you have applied this tag to a block of content. When you click this button to show the indicator, the block of content becomes shaded with a lighter version of blue. If more than one condition is applied to the block of content, the shading appears in a pattern that shows all of the applied condition colors.</p></div>
	Reverses the most recent action.
	Repeats the most recent action that you reversed.
	<p>Adds an annotation rectangle, extended to a sidebar to the right, with a line pointing to the selected content. This rectangle will hold 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.</p>
	Removes the selected annotation from the document.
	Applies bold typeface to the content selected in the topic.

Option	Description
	Applies italic typeface to the content selected in the topic.
	Underlines the content selected in the topic.
	Applies a paragraph tag to the content.
	Applies a heading tag (H1 through H6) to the content.
	Applies a bulleted list tag to the content.
	Applies a numbered list tag to the content.
	Applies definition list tags to the content.
	Outdents the list item(s). This option pertains only to lists, not other kinds of content.
	Indents the list item(s). This option pertains only to lists, not other kinds of content.
	Opens the Image dialog. Use to locate an image file, add alternate text, and set width and height attributes of the image to put in the editor. See "Images for Reviews" on page 74.
	Opens a drop-down that lets you select the number of columns and rows that you want to add as you insert a new table.

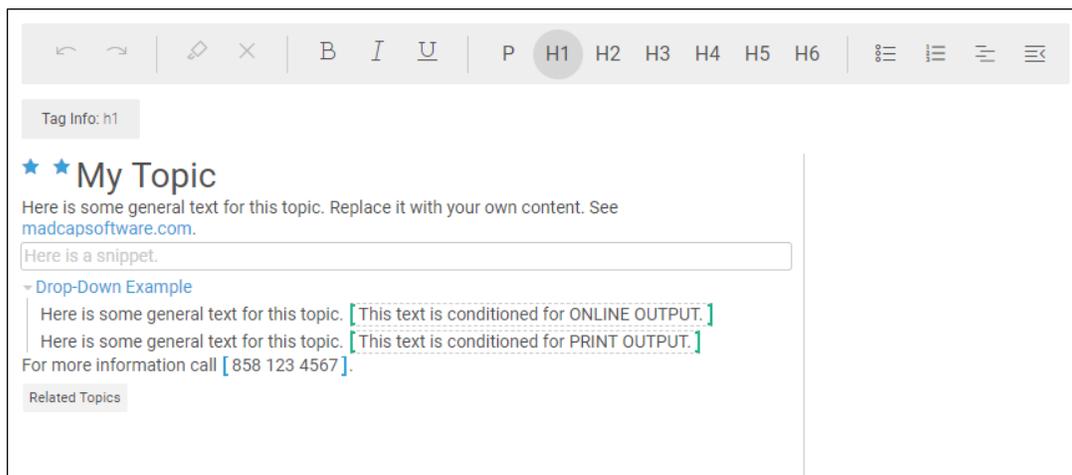
Info Bar

With all kinds of different elements (tracked changes, annotations, markers, conditions) possibly showing up in a file being reviewed, the Review Editor provides an info bar just under the toolbar. This bar displays details and is clickable in some cases.

Display Details

When you click in the editor, this info bar lets you know what that area contains. It also displays information such as the tag structure, the destination of a link, or annotation details.

☆ **EXAMPLE** You open a topic that looks like this, containing a few different elements besides just text:



The screenshot shows a software editor interface. At the top is a toolbar with icons for undo, redo, delete, bold, italic, underline, paragraph, and heading levels (H1-H6). Below the toolbar is an info bar with a 'Tag Info: h1' label. The main content area displays a topic titled 'My Topic' with two stars. Below the title is a paragraph of text: 'Here is some general text for this topic. Replace it with your own content. See madcapsoftware.com.' This is followed by a text input field containing 'Here is a snippet.' Below that is a 'Drop-Down Example' section with two lines of text: 'Here is some general text for this topic. [This text is conditioned for ONLINE OUTPUT.]' and 'Here is some general text for this topic. [This text is conditioned for PRINT OUTPUT.]'. The final line of text is 'For more information call [858 123 4567]'. At the bottom of the info bar is a 'Related Topics' label.

☆ Starting at the top, you notice two stars next to the heading. When you click the first star, the info bar tells you that it represents an index keyword.

The screenshot shows a MadCap software interface. At the top is a toolbar with icons for undo, redo, delete, bold, italic, underline, paragraph, and heading levels (H1-H6). Below the toolbar is a 'Tag Info' bar that reads 'h1 > MadCap:keyword', with a red arrow pointing to it. The main content area features a heading 'My Topic' with two blue stars to its left. A red arrow points to the first star. Below the heading is a text area containing: 'Here is some general text for this topic. Replace it with your own content. See madcapsoftware.com.', a text input field with 'Here is a snippet.', a collapsed 'Drop-Down Example' section, and two paragraphs of text with conditional tags: 'Here is some general text for this topic. [This text is conditioned for ONLINE OUTPUT.]' and 'Here is some general text for this topic. [This text is conditioned for PRINT OUTPUT.]'. Below this is a paragraph: 'For more information call [858 123 4567].' At the bottom is a 'Related Topics' section.

☆ If you click the second star, you will see that it is a concept.

Tag Info: h1 > MadCap:concept

☆☆ My Topic

Here is some general text for this topic. Replace it with your own content. See madcapsoftware.com.

→ Drop-Down Example

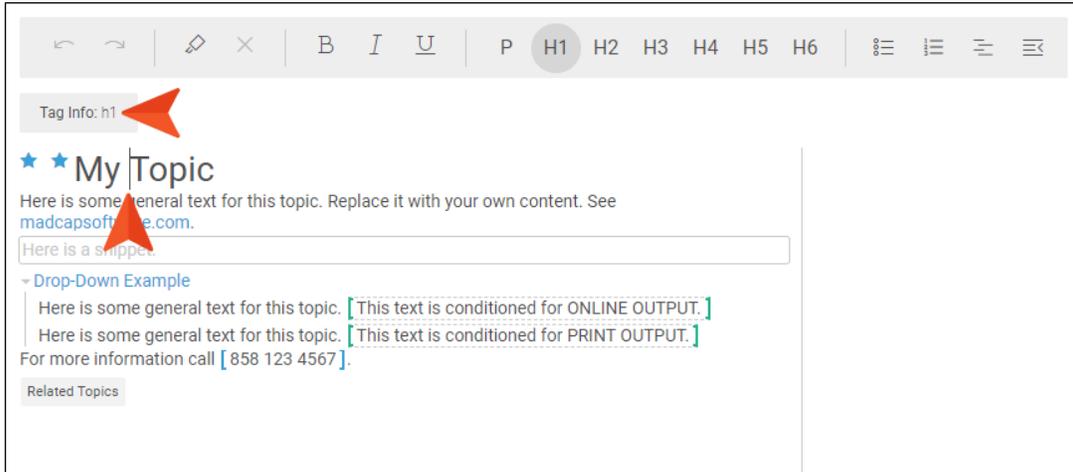
Here is some general text for this topic. [This text is conditioned for ONLINE OUTPUT.]

Here is some general text for this topic. [This text is conditioned for PRINT OUTPUT.]

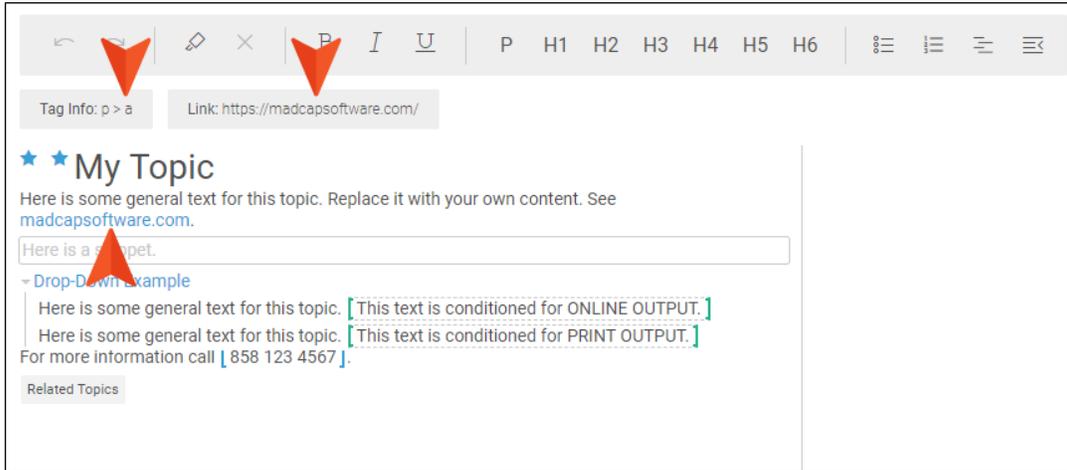
For more information call [858 123 4567].

Related Topics

☆ The info bar also gives you details about regular text. If you click somewhere on the “My Topic” heading, the info bar tells you that it is using the <h1> (first-level heading) tag.



☆ At the end of the first paragraph, you see the text “madcapsoftware.com” within green brackets. If you click on that text, you will see that it is a link (<a> tag).



The screenshot shows a rich text editor interface. At the top is a toolbar with various icons for undo, redo, link, unlink, bold, italic, underline, and text alignment. Below the toolbar, a 'Tag Info' dialog is open, showing 'p > a' and a 'Link' field containing 'https://madcapsoftware.com/'. The main editing area displays a document titled 'My Topic' with several paragraphs of text. The text includes a link to 'madcapsoftware.com' and two paragraphs of text with conditional tags: '[This text is conditioned for ONLINE OUTPUT.]' and '[This text is conditioned for PRINT OUTPUT.]'. A 'Drop-Down Example' is also visible. The bottom of the editor shows a 'Related Topics' section.

☆ Under that, there is some red text, indicating that someone has added content. If you click either on that red text or on the rectangle in the side bar associated with it, the info bar gives you two pieces of information. First, it lets you know that the text is using the <p> (paragraph) tag. And second, it indicates who made the change and when.

The screenshot displays a rich text editor interface. At the top, there is a toolbar with various editing tools including undo, redo, link, unlink, bold, italic, underline, paragraph, and heading levels (H1-H6). Below the toolbar, a 'Tag Info: p' box is visible, and a 'Tracked Changes' notification bar shows 'Change by Paul Stoecklein a few seconds ago' with a red arrow pointing to the change. The main content area features a title 'My Topic' with two stars, followed by a paragraph of general text and a link to 'madcapsoftware.com'. A red text change is shown: 'Here is some new text.' Below this is a text input field containing 'Here is a snippet.' and a 'Drop-Down Example' section with two lines of text, each followed by a green-bordered box containing 'This text is conditioned for ONLINE OUTPUT.' and 'This text is conditioned for PRINT OUTPUT.' respectively. A 'Related Topics' button is at the bottom left. On the right side, a 'PS Added' notification box is present.

- ☆ Under the red text is more text in a border. This is read-only text, and when you click it, the info bar lets you know that it is a snippet block (i.e., a snippet that is taking up the entire paragraph so that no text can be added to the left or right of it).

The screenshot displays a MadCap software interface. At the top is a toolbar with icons for undo, redo, delete, and various text formatting options (bold, italic, underline, paragraph, heading levels H1-H6, and list styles). Below the toolbar, a 'Tag Info' box shows 'MadCap:snippetBlock' with a red arrow pointing to it. The main content area features a heading 'My Topic' with two stars, followed by a paragraph of general text and a link to 'madcapsoftware.com'. Below this is a red line of text 'Here is some new text.' and a blue-bordered box containing the text 'Here is a snippet.' with a red arrow pointing to it. A floating context menu with edit, delete, and copy icons is positioned over the snippet box. Below the snippet box, there are two lines of text with conditional tags: '...text for this topic. [This text is conditioned for ONLINE OUTPUT.]' and 'Here is some general text for this topic. [This text is conditioned for PRINT OUTPUT.]'. At the bottom, there is a line of text 'For more information call [858 123 4567].' and a 'Related Topics' section. On the right side, a 'PS Added' notification box is visible.

- ☆ Below this, there is some blue text with a down arrow, followed by regular text with a vertical line to the left. This is a drop-down effect. If you click the blue text, the info bar tells you that it is the hotspot for the drop-down (i.e., the content that a user clicks to expand or collapse the content below it in the output).

The screenshot displays a MadCap software interface. At the top, there is a toolbar with various editing tools. Below the toolbar, a tag info bar shows the path: "Tag Info: MadCap:dropDown > MadCap:dropDownHead > MadCap:dropDownHotspot", with a red arrow pointing to the "dropDownHotspot" tag. The main content area features a blue star icon and the heading "My Topic". Below the heading, there is a paragraph of text: "Here is some general text for this topic. Replace it with your own content. See [madcapsoftware.com](#). Here is some new text." A text input field contains the text "Here is a snippet." Below this, a section titled "Drop-Down Example" is shown with a blue down arrow. This section contains two lines of text: "Here is some general text for this topic. [This text is conditioned for ONLINE OUTPUT.]" and "Here is some general text for this topic. [This text is conditioned for PRINT OUTPUT.]" A red arrow points to the first line of this section. At the bottom of the section, there is a link: "For more information call [858 123 456 /]." A "Related Topics" button is located at the bottom left of the content area. On the right side, there is a "PS Added" button.

☆ And if you click the text to the right of the vertical bar, you will see that it is part of the drop-down body and happens to be using the <p> tag.

Tag Info: MadCap:dropDown > MadCap:dropDownBody > p

★ ★ My Topic

Here is some general text for this topic. Replace it with your own content. See madcapsoftware.com.

Here is some new text.

Here is a snippet.

▼ Drop-Down Example

Here is some general text for this topic. [This text is conditioned for ONLINE OUTPUT.]

Here is some general text for this topic. [This text is conditioned for PRINT OUTPUT.]

For more information call [858 123 4567].

Related Topics

PS Added

- ☆ Within the drop-down body, you see a couple of lines of text with a dashed border, surrounded by green brackets. If you click in one of these lines of text, you will see that a condition has been applied to it.

The screenshot displays the MadCap software interface. At the top, there is a navigation bar with icons for undo, redo, delete, and various text formatting options (bold, italic, underline, paragraph, heading levels H1-H6, and list styles). Below the navigation bar, a breadcrumb trail reads: "Tag Info: MadCap:dropDown > MadCap:dropDownBody > p > MadCap:conditionalText", with a red arrow pointing to the final segment. The main content area features a topic title "☆☆ My Topic" and a placeholder text: "Here is some general text for this topic. Replace it with your own content. See [madcapsoftware.com](#)." Below this, there is a red text snippet: "Here is some new text." and a white snippet box containing "Here is a snippet." A blue link labeled "Drop-Down Example" is visible. Underneath, two lines of text are shown, each enclosed in a dashed green border and green brackets. The first line reads: "Here is some general text for this topic. [This text is conditioned for ONLINE OUTPUT.]" and the second line reads: "Here is some general text for this topic. [This text is conditioned for PRINT OUTPUT.]" A red arrow points to the second line. At the bottom, there is a "For more information call [858 123 4567]." and a "Related Topics" button. On the right side, a sidebar contains a "PS Added" button.

- ☆ You also see some text with a yellow background, and a rectangle to the right of it in the side bar. This is an annotation (comment) that somebody inserted. If you click either that text or the rectangle, the info bar tells you that it is an annotation, as well as who created and modified it.

Tag Info: MadCap:dropDown > MadCap:dropDownBody > p > MadCap:annotation Annotation: Created by Paul Stoecklein a few seconds ago. Modified

★ ★ My Topic

Here is some general text for this topic. Replace it with your own content. See madcapsoftware.com.

Here is some new text.

Here is a snippet.

▼ Drop-Down Example

Here is some general text for this topic. [This text is conditioned for ONLINE OUTPUT.]

Here is some general text for this **topic**. [This text is conditioned for PRINT OUTPUT.]

For more information call [858 123 4567].

Related Topics

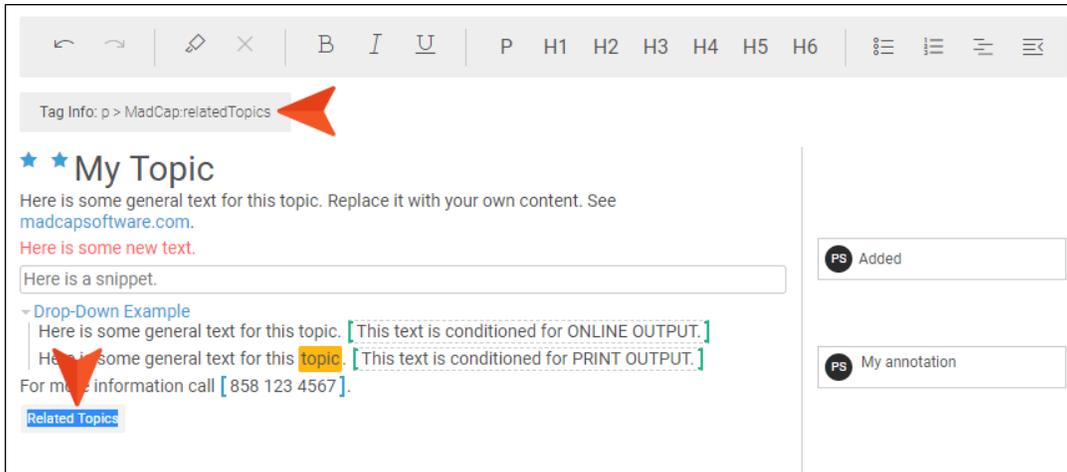
PS Added

PS My annotation

- ☆ The next unique piece of content is a phone number surrounded by blue brackets. When you click this, you will see that it is read-only text, and the info bar tells you it is a variable.

The screenshot shows a MadCap variable editor interface. At the top is a toolbar with icons for undo, redo, delete, bold, italic, underline, paragraph, and heading levels (H1-H6). Below the toolbar is a 'Tag Info' bar showing 'p > MadCap:variable' with a red arrow pointing to it. The main content area is titled 'My Topic' and contains several paragraphs of text. A red arrow points to a phone number '858 123 4567' which is enclosed in blue brackets. To the right of the main content is a sidebar with two annotation boxes: 'PS Added' and 'PS My annotation'. The bottom of the editor shows a 'Related Topics' section.

- ☆ And finally, the gray box at the bottom of the topic already lets you know that it is a Related Topics link, which cannot be edited in Flare Online. When you click in this box, the info bar shows you that it is indeed a Related Topics link within a <p> tag.



Clickable Tags

You can click any tag in the info bar, and the corresponding area in the content file will be selected as well.

- ☆ **EXAMPLE** You have a topic with a numbered list, and the cursor is currently located within it, at the end of step 3. Notice that the info bar describes the tag structure. The broadest tag is <body>, which essentially holds all of the content in the file. This is followed by (which is an ordered, or numbered, list), since the cursor is located within that list. Within that tag is , which represents the list item (in this case, the third list item). And finally, within that list item is a paragraph (or <p> tag).



Tag Info: `body > ol > li > p` 

Procedure 1

Here is some general text for this topic, followed by some steps.

1. Start by doing this thing.
2. Then do this other thing.
3. And then this thing. 
4. And finally do this thing.

If you were to click `li` in the info bar, the list item would be selected. (Clicking the `p` tag would look much the same in the editor.)

Tag Info: `body > ol > li` 

Procedure 1

Here is some general text for this topic, followed by some steps.

1. Start by doing this thing.
2. Then do this other thing.
3. And then this thing. 
4. And finally do this thing. 

If you click `ol` in the info bar, the entire list area would be selected.



Tag Info: body > ol

Procedure 1

Here is some general text for this topic, followed by some steps.

1. Start by doing this thing.
2. Then do this other thing.
3. And then this thing.
4. And finally do this thing.

And finally, if you click **body**, everything in the file would be selected.

Tag Info: body

Procedure 1

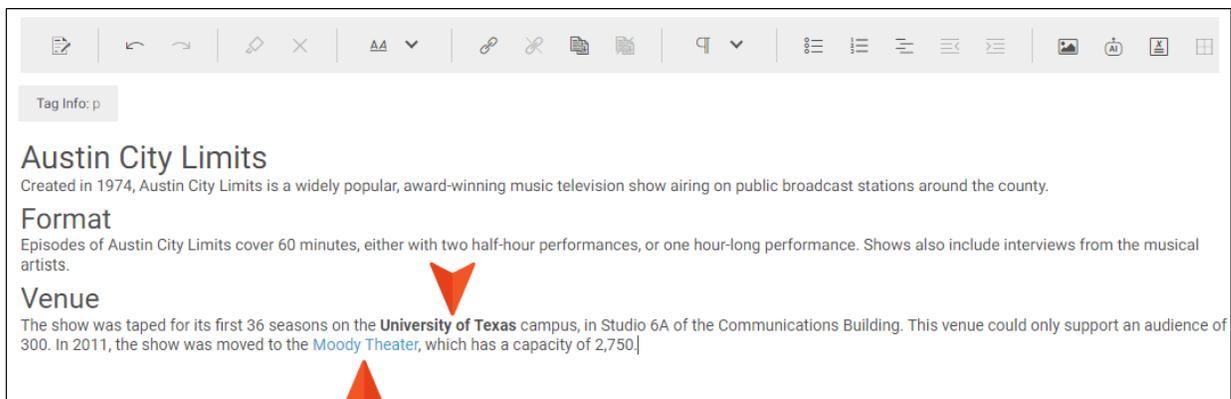
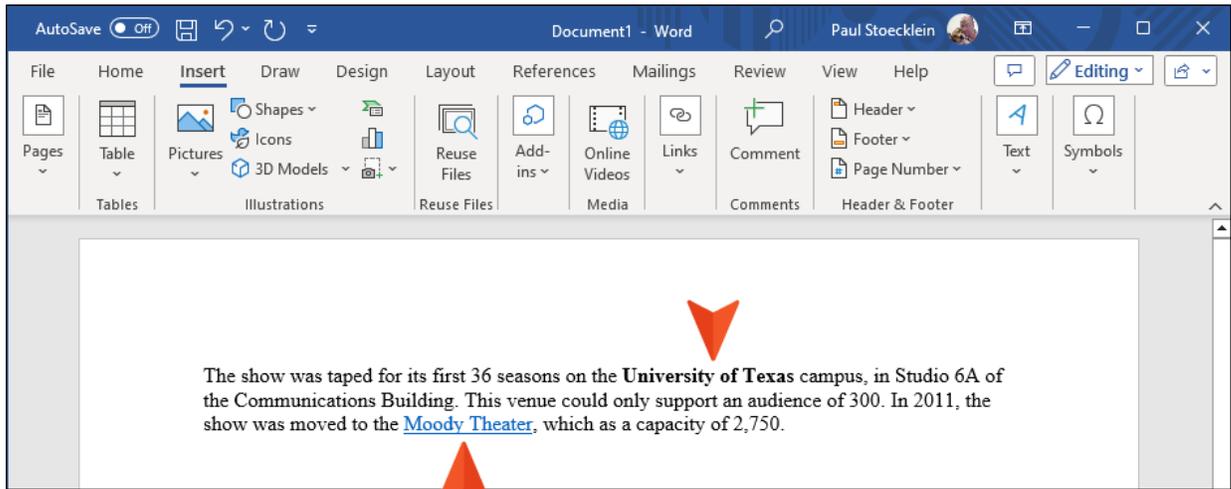
Here is some general text for this topic, followed by some steps.

1. Start by doing this thing.
2. Then do this other thing.
3. And then this thing.
4. And finally do this thing.

Copying and Pasting Content

Keep the following in mind when copying and pasting content:

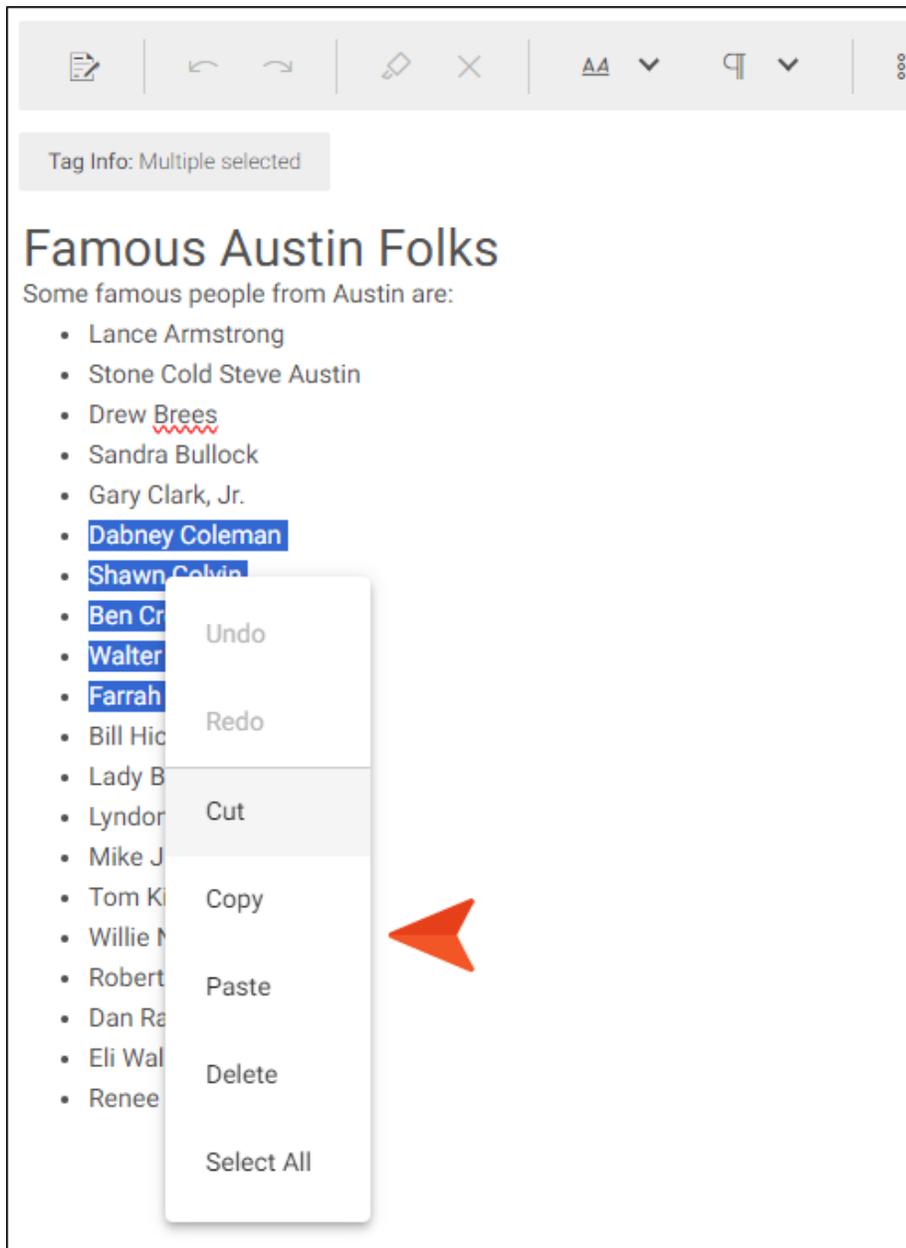
- **Text** When copying and pasting text, formatting is retained. This includes lists, hyperlinks, and other styles (e.g., bold, italics, underline), even when the text is copied from applications outside Flare Online.



- **Tables** Formatting for tables is retained when copying and pasting within and between files in Flare Online. Pasting tables from other software (e.g., Word, Outlook) will be inserted as simple tables.
- **Images** You can also copy and paste images, but only when you are doing so within the same topic or snippet. It does not work from outside sources.

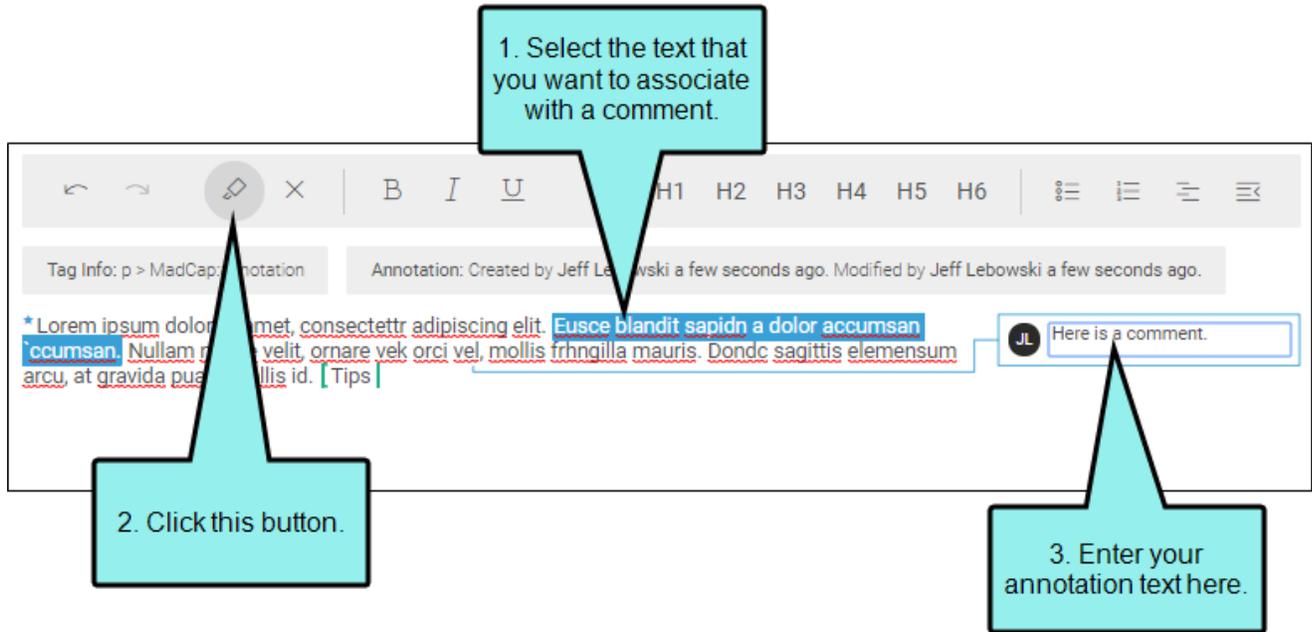
When copying and pasting (and performing other actions, such as cut, select all, and undo), you can use standard shortcuts (e.g., CTRL+C, CTRL+V) on your keyboard.

You can also right-click and select from a menu.



Annotations

By selecting content in the editor and clicking  in the toolbar, you can insert annotations (i.e., comments) regarding that content. Annotation text is placed in a rectangle in the sidebar to the right. If you click the annotation rectangle, a line points to the content associated with the inserted comment.

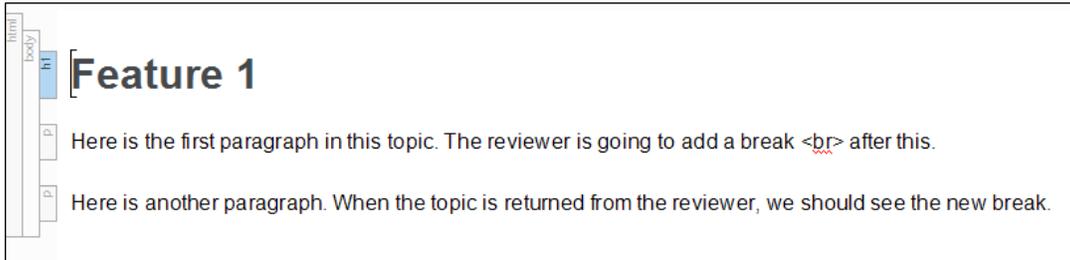


When authors review the file in Flare Desktop, they can manually incorporate feedback from annotations and then remove them as necessary.

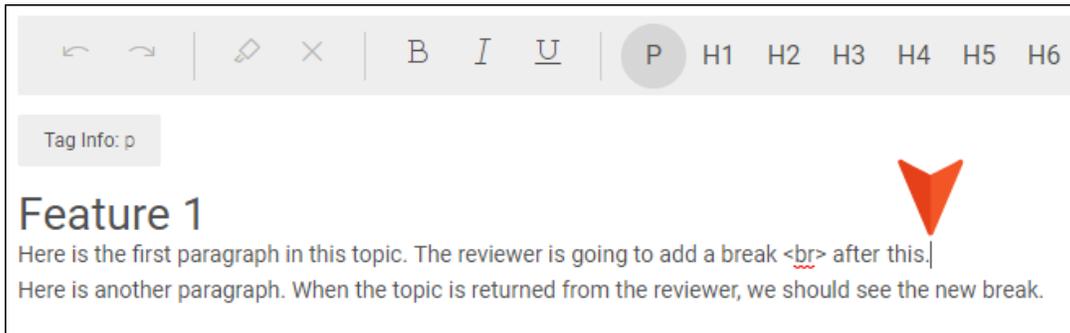
Breaks

You can insert break tags by pressing **SHIFT + ENTER** on your keyboard.

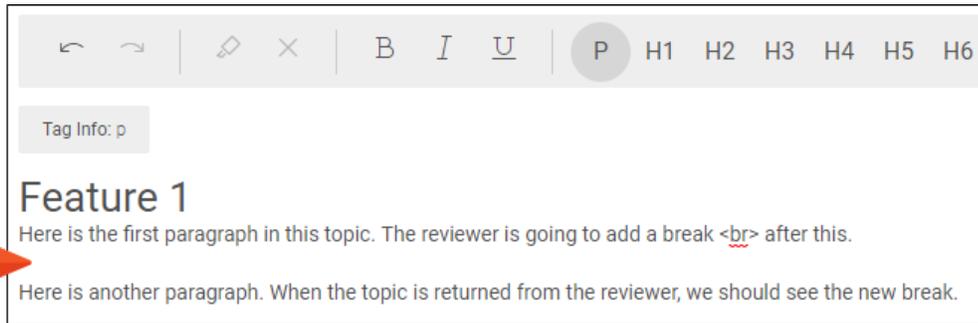
☆ **EXAMPLE** You have a topic in Flare Desktop that looks like the following, and you send it to someone for review in Flare Online.



In Flare Online, the reviewer places the cursor at the end of the first paragraph.



- ☆ After pressing **SHIFT + ENTER**, a break tag is added, but the only change seen is extra space between the paragraphs.



The reviewer submits the topic. After you accept the change and bring the topic back into the project, replacing the old version, you can see the tag when you view the topic in the Text Editor.

```
1 <?xml version="1.0" encoding="utf-8"?>
2 <html xmlns:MadCap="http://www.madcapsoftware.com/Schemas/MadCap.xsd">
3   <head>
4     </head>
5   <body>
6     <h1>Feature 1</h1>
7     <p>Here is the first paragraph in this topic. The reviewer is going to add a break &lt;br&gt; after this.<br /></p>
8     <p>Here is another paragraph. When the topic is returned from the reviewer, we should see the new break.</p>
9   </body>
10 </html>
```

Conditions

If conditions have been applied to content, that content will display with a dashed border, regardless of the color of the conditions in the project. Conditions that are set inline also show brackets on the left and right sides of it.

☆ **EXAMPLE** You have a topic in Flare Desktop that looks like the following. Notice that a sentence within the first paragraph has a red condition tag applied. Below it, an entire paragraph has a blue condition applied.

Procedure 3

Here is a paragraph. [■ This second sentence has a condition set on it.]

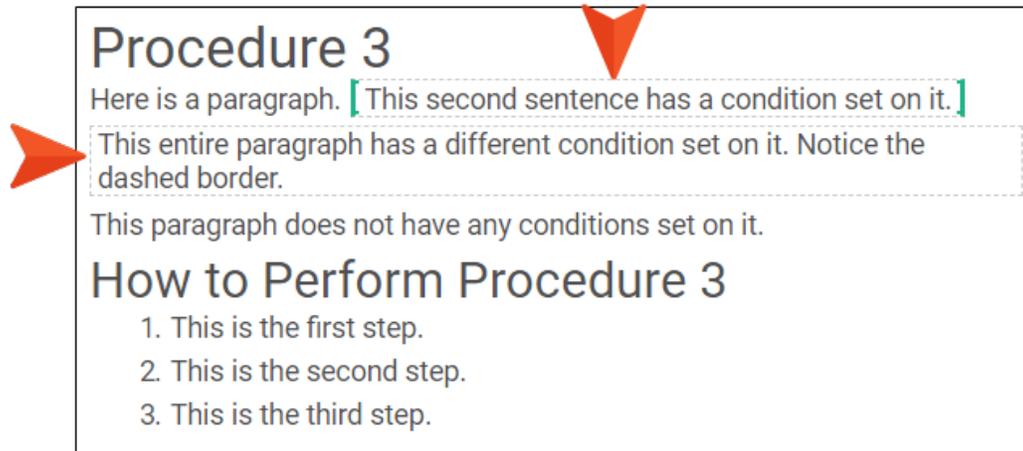
This entire paragraph has a different condition set on it. Notice the dashed border.

This paragraph does not have any conditions set on it.

How to Perform Procedure 3

1. This is the first step.
2. This is the second step.
3. This is the third step.

- ☆ When this topic is opened in Flare Online, it looks like the following, with the first condition shown within brackets and a dashed border. The second condition is set at the block level, so it just has a dashed border.



Procedure 3

Here is a paragraph. [This second sentence has a condition set on it.]

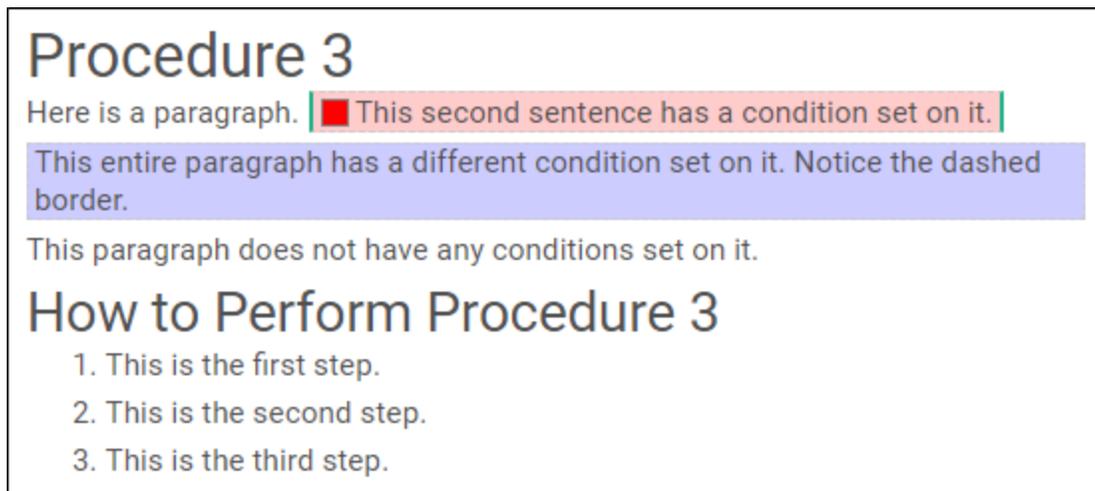
This entire paragraph has a different condition set on it. Notice the dashed border.

This paragraph does not have any conditions set on it.

How to Perform Procedure 3

1. This is the first step.
2. This is the second step.
3. This is the third step.

You can click  in the toolbar to toggle between showing and hiding the colored square and background associated with the condition.



Procedure 3

Here is a paragraph.  This second sentence has a condition set on it.]

This entire paragraph has a different condition set on it. Notice the dashed border.

This paragraph does not have any conditions set on it.

How to Perform Procedure 3

1. This is the first step.
2. This is the second step.
3. This is the third step.

-  **NOTE** Reviewers can make changes to the content (unless it happens to be read-only), but they cannot make changes to the condition tags themselves.

eLearning Question Sections

If an author sends a topic or snippet for review that includes an eLearning question section (i.e., question, answers, and sometimes feedback and a Submit button), it displays in the Review Editor and can be edited. For more details about learning & development (i.e., eLearning), see the Flare Desktop Help system.

Permission Required?

No special permission is required for this activity. All users who are associated with the review process for the specified file are allowed.

How to Edit an eLearning Question Section

1. On the Reviews page, open a topic or snippet that contains a question section.
2. Do any of the following:
 - Replace or delete text for the question, answers, or feedback.
 - Select an answer's circle or square so that it is marked as correct.
 - Press **ENTER** at the end of any answer to add a new answer.
 - If you want to add other content below the question section, press the down arrow on your keyboard until you see the horizontal cursor at the very end. Then, press **ENTER** to create a new empty paragraph.

Images for Reviews

You can insert, edit, and move images in Flare Online's Review Editor.

 **NOTE** In order to use this feature in Flare Online, the file to be reviewed must have been sent from the latest version of Flare Desktop.

Inserting New Images

After opening a file for review, you can insert new images in it.

How to Insert an Image

1. In the local toolbar of the Review Editor, click .



2. In the dialog, select the **File** three-dot menu for the Open dialog, then navigate to and choose a new image.
3. (Optional) You can add alternate text (i.e., alt text) to the image. Alternate text is used to display when the image is not available, such as when a disabled individual is using a screen reader. Click the **Alternate Text** field and enter a description.
4. (Optional) You can change the size of the image. Select  to make selections in a popup. The Height or Width field at the top of the popup lets you select a variety of settings. The Unit field at the bottom of the popup lets you select a variety of absolute and relative units of measurement.
5. Click  to save your work.

File Types Supported

- PNG
- GIF
- JPG
- BMP
- SVG
- TIFF

File Size Limit

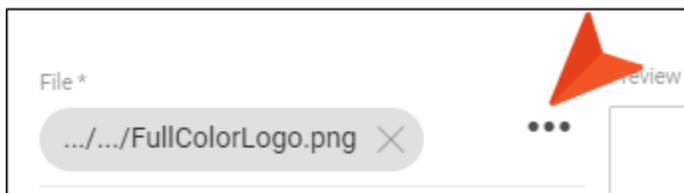
15 MB

Editing Image Properties

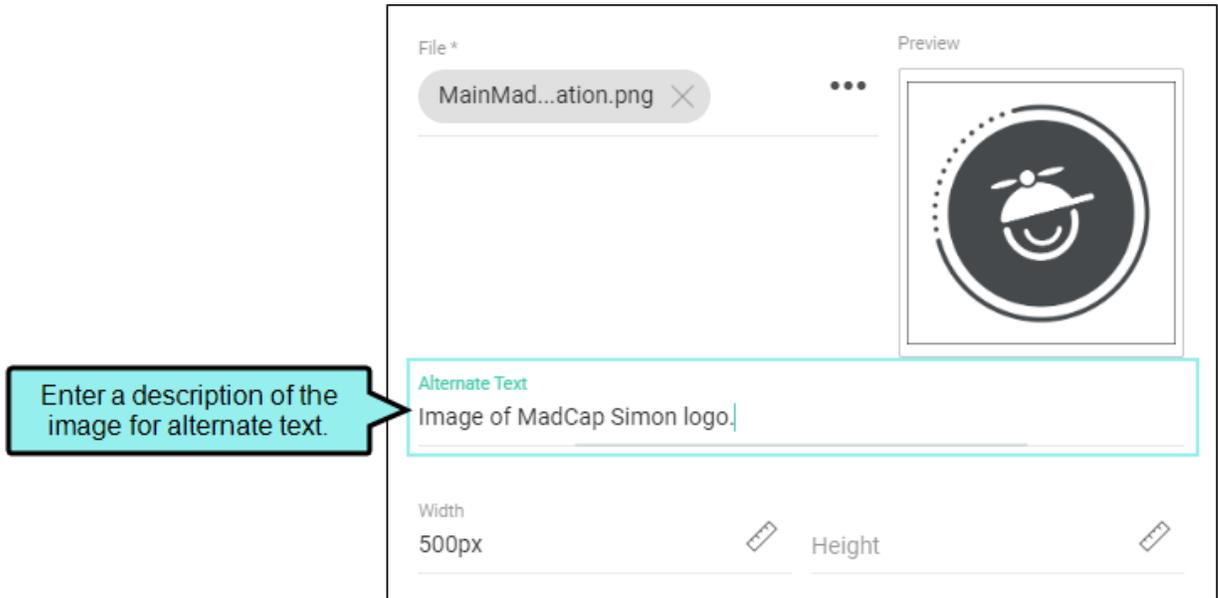
Once an image is in a file, you can edit the image properties.

How to Edit Image Properties

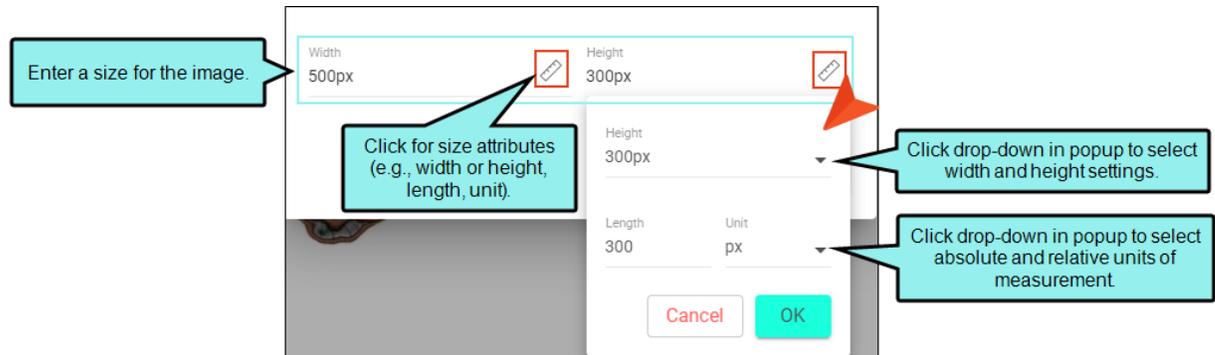
1. With the topic or snippet open in the Review Editor, select an image you want to edit.
2. In the local toolbar of the Review Editor, click .
3. Since you are reviewing, you can only upload a new file from your local system. In the dialog, select the **File** three-dot menu for the Open dialog, then navigate to and choose a new image.



- (Optional) You can add alternate text (i.e., alt text) to the image. Alternate text is used to display when the image is not available, such as when a disabled individual is using a screen reader. Click the **Alternate Text** field and enter a description.



5. (Optional) You can change the size of the image. Select  to make selections in a popup. The Height or Width field at the top of the popup lets you select a variety of settings. The Unit field at the bottom of the popup lets you select a variety of absolute and relative units of measurement.



6. Click  to save your work.

 **NOTE** When resizing objects, you can ensure the aspect ratio is maintained. For example, if you want certain objects to be resized so that each is exactly 3 inches high, you can make sure the width of each object is adjusted accordingly to stay in proportion. To do this, first set the height at 3 inches. You would not set the width property at all. In the same way, if you were to specify an exact width, you could maintain the aspect ratio by not setting the height.

 **NOTE** Please be aware that if you are using percentage for the size of an object, the percentage refers to the block containing that object, not to the object itself. For example, if you have an object in a topic and set the width to 60%, this does not mean that the object will be reduced to 60% of its size. Instead, it means that the object will be resized so that its width is 60% of the "container" where it is inserted.

 **NOTE** By default, a new image does not contain an alternate text attribute, unless you specifically add alt text in the Insert Or Edit Image dialog. However, alt attributes on images are required for Section 508 compliance, even if the string is empty or null (alt="").

Dragging and Dropping Images

You can drag and drop images inside a topic or snippet in Flare Online. When you click on an image and begin dragging, you'll notice a somewhat transparent version of the image following your mouse.

Attractions

There are many places to visit in Austin. Three of these are the State Capitol, Zilker Park, and Lady Bird Lake.



State Capitol

Austin is the capitol of Texas. The Texas State Capitol building were finished in 1888. It boasts 22 acres with numerous monument History Memorial, the Vietnam Way monument and miniature Statue of Liberty.

Zilker Park

Covering 351 acres, Zilker Park is a popular recreational area offering many activities. Some of these are hiking, picnics, volleyball, children. The area is also home to Zilker Botanical Garden and the Austin Nature and Science Center.



After releasing the mouse button, the image is settled into its new location.

Attractions

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Zilker Park

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Copying and Pasting Images

You can copy and paste images, but only when you are doing so within the same topic or snippet. It does not work from outside sources.

Accepting Images in Flare Desktop

After reviewed topics and snippets are submitted, they are added to the owner's review inbox in Flare Desktop.

If the author accepts the file back into the local project in Flare Desktop, any images that were added in Flare Online will be stored in the Resources > Images folder in Flare Desktop by default. If the Images folder doesn't yet exist, Flare Desktop will create it for you.

If there is a conflict (e.g., you already have an image in the project with the same name), a wizard opens so that the author can resolve the conflicts. The author can select a different location in Flare Desktop to store the image and/or give it a different name.

Lists

Flare Online's Review Editor supports bulleted, numbered, and definition lists.

Bulleted and Numbered Lists

In addition to editing bulleted and numbered lists that are part of a topic or snippet being reviewed, you can create new lists.

How to Add a Bulleted or Numbered List

1. In the local toolbar of the Review Content Editor, click  (for a bulleted list) or  (for a numbered list).
2. Type text and press **ENTER**.
3. Type text and press **ENTER** to create a new bullet or number and repeat.

If you want to create another level in the list, click  in the toolbar. If you are on an indented list and want to go back to the outer level, click  in the toolbar.

4. If you want to end the list, press **ENTER** at the end of the final list item one more time to go back to a `<p>` (paragraph) tag.

Definition Lists for Reviews

If an author sends a topic or snippet for review that includes a definition list, it displays in the Review Editor and can be edited. In addition, a reviewer can use a button in the Review Editor toolbar to create a new definition list. For more details about definition lists, see the Flare Desktop Help system.

Definition List Tags

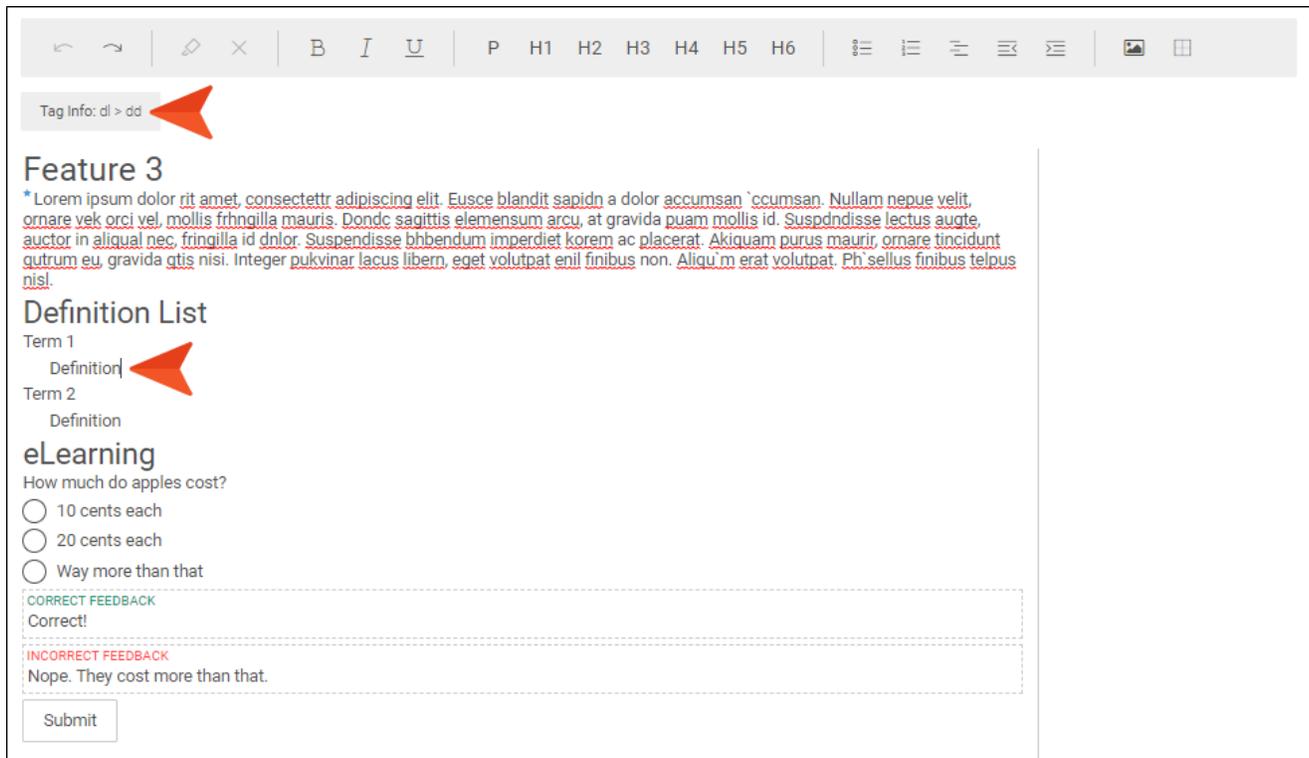
Definition lists contain three basic tags:

- `<dl>` The outermost tag that serves as the container for the entire list.
- `<dt>` The first interior tag that represents a term.

- **<dd>** The second interior tag that represents a definition.

When you click any of the content in a definition list shown in the Review Editor, the info bar at the top indicates whether the cursor is placed on a term or a definition.

The screenshot displays a Review Editor interface. At the top, there is a toolbar with various editing tools. Below the toolbar, a 'Tag Info: dl > dt' box is visible, with a red arrow pointing to it. The main content area is divided into sections: 'Feature 3' with a paragraph of Lorem Ipsum text; 'Definition List' with two entries, 'Term 1' and 'Term 2', each followed by a 'Definition' label; 'eLearning' with a question 'How much do apples cost?' and three radio button options: '10 cents each', '20 cents each', and 'Way more than that'. Below the options, there are two feedback boxes: 'CORRECT FEEDBACK' with the text 'Correct!' and 'INCORRECT FEEDBACK' with the text 'Nope. They cost more than that.'. At the bottom, there is a 'Submit' button.



How to Add a New Definition List

1. In the local toolbar of the Review Editor, click . The info bar changes to show that you have created a `<dl>` (definition list) tag with a `<dt>` (definition term) tag within it.
2. Type the term text and press **ENTER**. The next line is now a `<dd>` (definition) tag within the `<dl>` tag.
3. Type the definition text and press **ENTER**.

The new line is initially a `<dd>` tag as well, which allows you to enter additional text for a definition.

If you don't want an additional line for more definition text, press **ENTER** again. This creates a new line, which allows you to enter a new term and repeat the process.

If you want to end the definition list, press **ENTER** one more time to go back to a `<p>` (paragraph) tag.

How to Edit an Existing Definition List

1. In the Review Editor, at the end of a term, press **ENTER** to create a new line, which will be a definition.
2. After entering a definition, press **ENTER**.

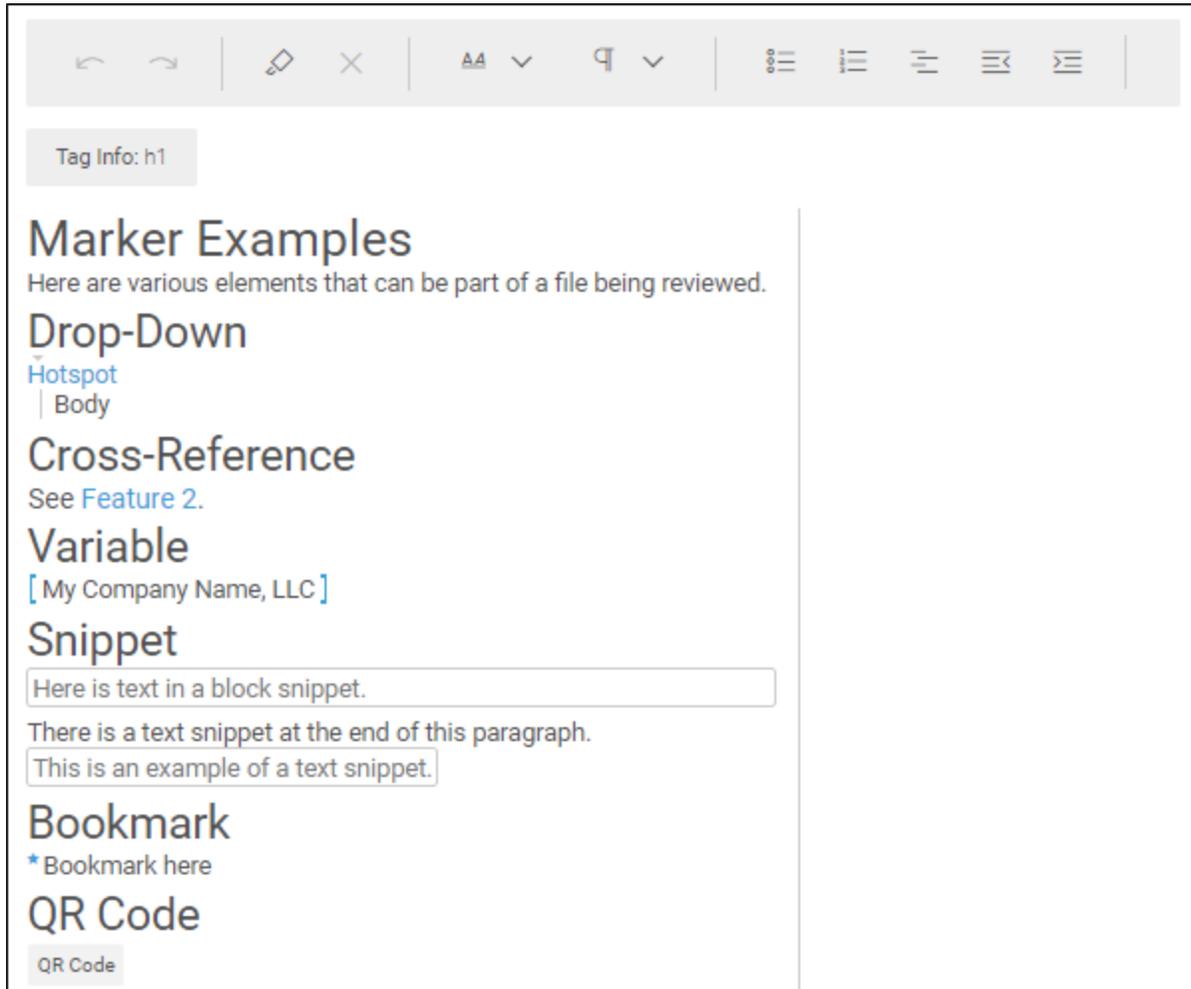
This creates a new line, which allows you to enter additional text for a definition.

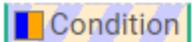
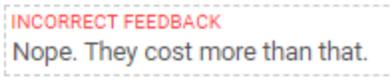
If you don't want an additional line for more definition text, press **ENTER** again. This creates a new line, which allows you to enter a new term and repeat the process.

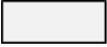
If you want to end the definition list, press **ENTER** one more time to go back to a <p> (paragraph) tag.

Markers

The tags and markup that are necessary for Flare topics and snippets are represented by various markers in the editor. These provide a visual cue that more than simple text is present. In many cases, the reviewer probably won't need to—or even be allowed to—make changes to the element. But it is important to know that one of these elements is present so that it does not get deleted accidentally.



Marker	Elements
Blue Brackets  (Used for read-only content)	Footnotes Variables
Blue Hotspot, Arrow, Vertical Bar 	Drop-Downs
Blue Text 	Cross-References Text Hyperlinks Topic Popups
Colored Square and Background 	Conditions Applied and Shown
Dashed Border   	Conditions eLearning Feedback

Marker	Elements	
Gray Box 	3D Models	Page Breaks (light gray)
	Concept Links	Page Footers
	Forms/Fields	Page Headers
	Keyword Links	Proxies
	Multimedia	Related Topic Links
	QR Codes	Shortcuts
Green Brackets  (Used for editable content)	Code Snippets	Responsive Content
	Divs	Spans
	Glossary Term Links	Subscript
	Inline Conditions	Superscript
	Micro Content	Text Popups
	Redacted Text	Togglers

Marker	Elements
--------	----------

Solid Border

Here is a snippet.

Submit

Snippets

eLearning Submit Button

Star



Bookmarks

Index Keywords

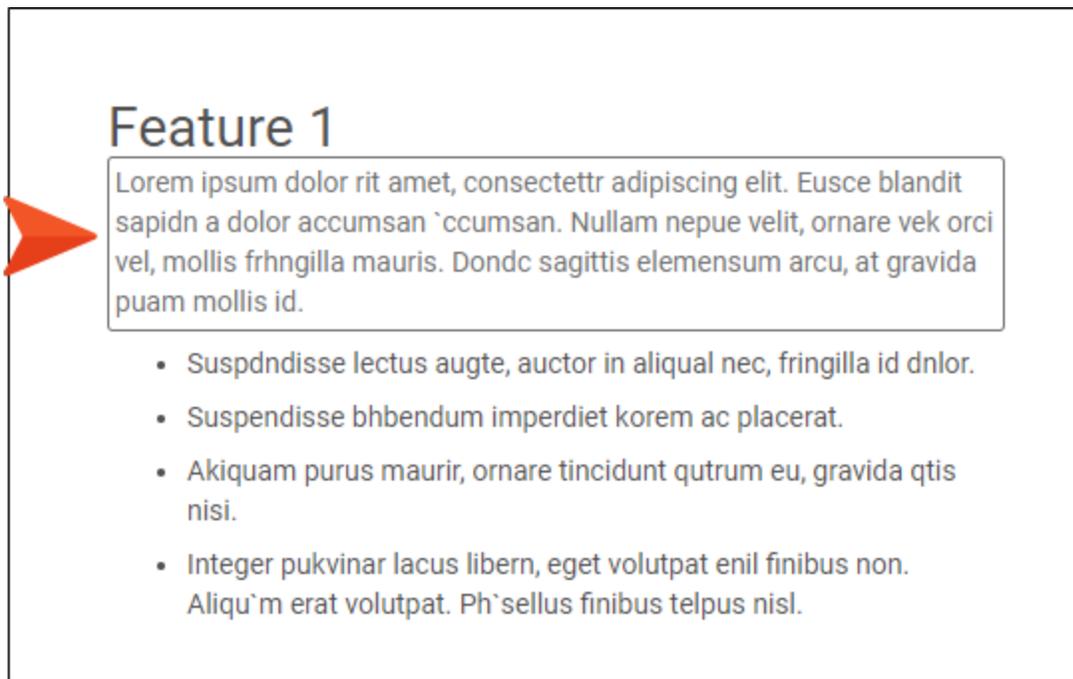
Concepts

Scripts

Snippets for Reviews

A snippet is a chunk of formatted content inserted into a topic (or another snippet). As long as the author has included a snippet as part of the review package, you can edit it in the Review Editor, just as you can edit topics.

A border displays around an inserted snippet (in most browsers), and it is read-only until you open it separately to edit it.



Feature 1

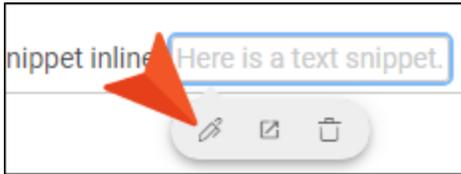
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Eiusmod blandit sapien a dolor accumsan accumsan. Nullam neque vel, ornare vestibulum orci vel, mollis fringilla mauris. Donec sagittis elementum arcu, at gravida quam mollis id.

- Suspendisse lectus augue, auctor in aliquam nec, fringilla id dolor.
- Suspendisse bibendum imperdiet lorem ac placerat.
- Aliquam purus mauris, ornare tincidunt quam eu, gravida quis nisi.
- Integer pulvinar lacus libero, eget volutpat enim finibus non. Aliquam erat volutpat. Phasellus finibus tunc nisl.

You can open snippets from their point of insertion in a file and make edits in a popup window. This means you do not need to interrupt the flow of editing the topic (or another snippet) in order to edit a snippet within it.

How to Edit a Snippet in a Popup

1. In Flare Online open a file in a review package.
2. Open a review file that has a snippet inserted into it.
3. In the Review Editor click the inserted snippet.
4. In the toolbar popup under the snippet, click .



 **NOTE** You can also right-click the snippet and select **Edit Snippet**.

5. In the popup editor, make changes to the snippet.
6. Click **Submit** and close the popup window.

Tables for Reviews

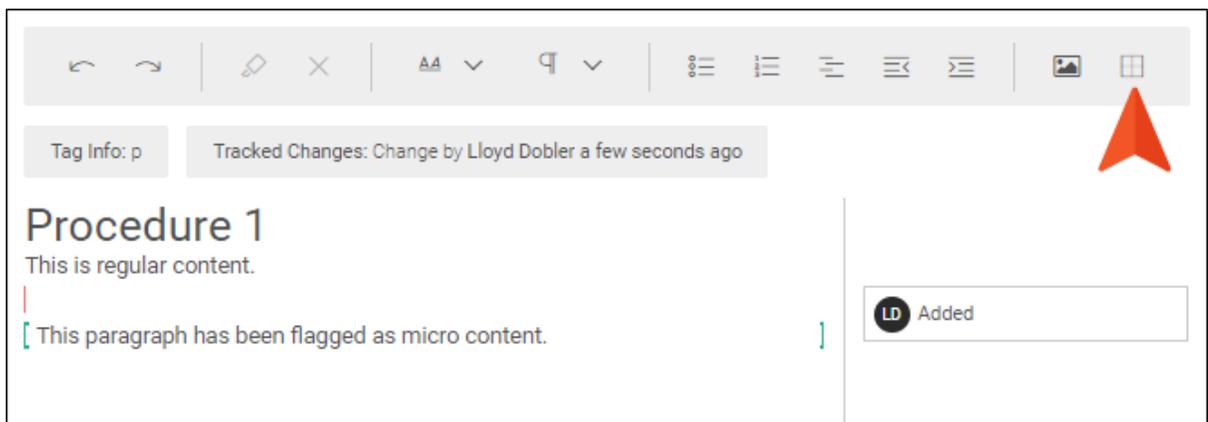
Flare Online's Review Editor supports tables. This means that reviewers can insert new tables, as well as make edits to existing tables.

Inserting New Tables

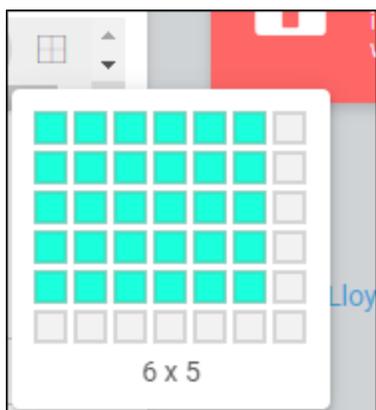
After opening a file for review, you can insert new tables in it.

How to Insert a Table

1. In the local toolbar of the Review Content Editor, click .



2. In the drop-down, hover over the squares representing the number of rows and columns that you want, and click.



3. Click in any of the table cells and add content.

Editing Tables

If a table already exists, not only can you edit the content in it, but you can add or delete rows and columns. You can also delete an entire table.

How to Add Rows and Columns

1. Right-click in a row or column near where you want to add a new one.
2. In the context menu, select one of the options:
 - **Insert Row Above**
 - **Insert Row Below**
 - **Insert Column to the Left**
 - **Insert Column to the Right**

How to Delete a Row or Column

1. Right-click in a row or column that you want to remove. If you want to delete multiple rows or columns, you can click and drag to select them first, before right-clicking.
2. In the context menu, select **Delete Row** or **Delete Column**.

How to Delete a Table

1. Right-click anywhere in the table that you want to remove.
2. In the context menu, select **Delete Table**.

Copying and Pasting Tables

Formatting for tables is retained when copying and pasting within and between files in Flare Online. Pasting tables from other software (e.g., Word, Outlook) will be inserted as simple tables.

What's Noteworthy?

 **NOTE** At this time you can add only regular rows and columns. You cannot add header or footer rows.

 **NOTE** Although you can insert and edit tables, you cannot apply table stylesheets to them in Flare Online to affect the look. When a file with a newly inserted table comes back into Flare Desktop, it does so as a plain table. After the author accepts the file in Flare Desktop—replacing the old version of that file—a table stylesheet can be applied to the table at that point.

I Submitting Review Files

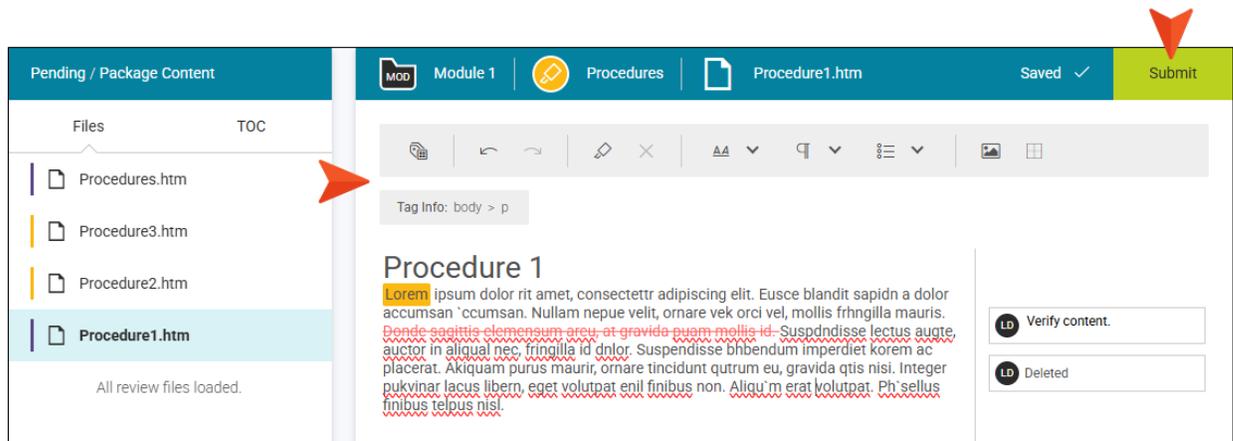
Reviewers can return to a file in the Pending pane repeatedly over time to make changes to it. When reviewers finish working on a file and do not need to make any further edits, they submit the file.

Permission Required?

No special permission is required for this activity. All users who are associated with the review process for the specified file are allowed.

How to Submit Review Files

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Reviews**.
3. From the appropriate **Packages** pane (e.g., Pending, Sent), find the relevant review package, and select **Show files** .
4. Select **Files** or **TOC** at the top for your preferred view. If an owner chooses not to associate files with a TOC when initially sending a review, a TOC will not be applicable to your review package.
5. Select a file. It displays in the Review Editor to the right.
6. Edit the file.
7. In the upper-right corner, click **Submit**.



8. Repeat the steps for every file included in the review package (i.e., select the file, edit the file, and submit the file).

The reviewer is done submitting once all the files in the queue are complete. This moves the review package to the Submitted pane. Files can be viewed from there and edited still, but once the owner closes the file, it can no longer be edited in Flare Online.

Setting Notifications for Reviews

In your account settings, you can choose when to be notified for specific activities. The user who is notified depends on the activity. For more information, see the Help system.

Lloyd Dobler
ldobler@ahem.madcapsoftware.com
R&D
La Jolla, CA
(123) 456-7890
(123) 098-7654

Settings
Password
Access
Assign New Task
Activity
Permissions
Notifications
Deactivate
Delete

Notifications

Send notifications by

Notification Center Email

Send notifications when

- Builds
- Checklists
- Licenses
- Projects
- Reports
- Sites
- Tasks
- Teams
- Translation
- Users

Reviews

- Review Completed
- Review Created
- Review Document Failed
- Review Package Closed
- Review Package Submitted

Cancel Save

CHAPTER 4

Other Activities for Reviews

In addition to the main activities, there are some other tasks you might perform regarding this feature.

This chapter discusses the following:

- Managing Review Packages 98
- Creating Review Packages 113
- Viewing Review Profiles 116
- Updating Review Status 120

I Managing Review Packages

Once review packages are in Flare Online, SMEs and authors can edit, annotate, set status, and send files back to the owner.

In addition to the reviewing and editing capabilities, bundling files in a review package provides authors with options for managing packages and files in Flare Online. How you use and control the available options depends on what is important to your specific review workflow.

Permission Required?

For this activity, you must have the following permission setting:



Why Manage Reviews?

- **Package Updates** Review packages can be adjusted after they are created and sent for review. You can easily access the Review Package profile to add or delete files for a package, add or remove reviewers, change the TOC, or update the status of a package for any review package that is in Flare Online.
- **Revision History** You can glean information from the Projects > Commits page since it acts as a history log for file versions that are connected to your local project in Flare Desktop. The commit ID is a reference point for when an item was created in the repository regardless of what it includes (e.g., review packages, files).
- **Timely Feedback** Collaborative content reviews are a vital part in the documentation process. The review packages feature enables owners to keep an active eye on any reviews in progress. Stale statuses or date and time gaps can trigger owners to follow up on progress.
- **Tracking** Use the data grids to follow every aspect of a review package as it moves through the review process. You can click different path links in the Reviews interface to locate and find more information about projects, files, or users in Flare Online. You can filter and sort data to quickly search statuses, names, dates, projects, etc.
- **Viewing Status** Virtually every component in Flare Online reviews captures some sort of status. For example, status is reflected in the Review Explorer, the package overview, the right Side Panel, the grids, and the profiles. It ranges from what state the package is in, the overall status of all files in a package, to the individual reviewer status and where they are with a given file. Flare Desktop and Flare Online work together to maintain the current state of files in a review package to their respective environments; giving momentum to the review process.

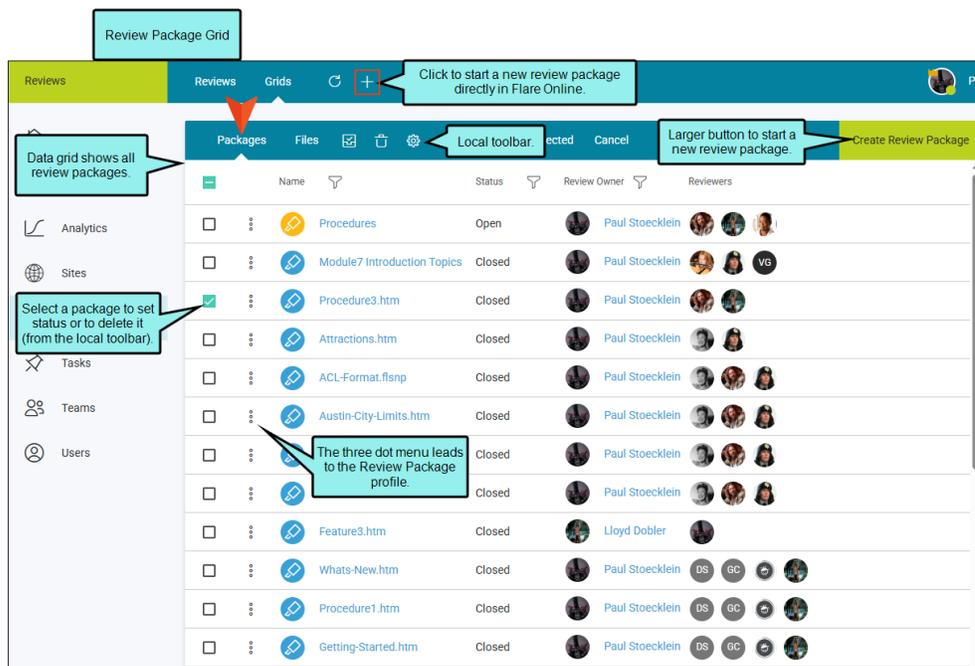
Packages and Files Grids

The Packages grid displays all the review packages in Flare Online, while the Files grid shows all files sent for review regardless of the package. The grids provide a way to view, modify, or compare data. Each grid has a local toolbar, and most column elements are clickable, leading you to relevant pages, context menus, and profiles for further inspection of details and manipulation.

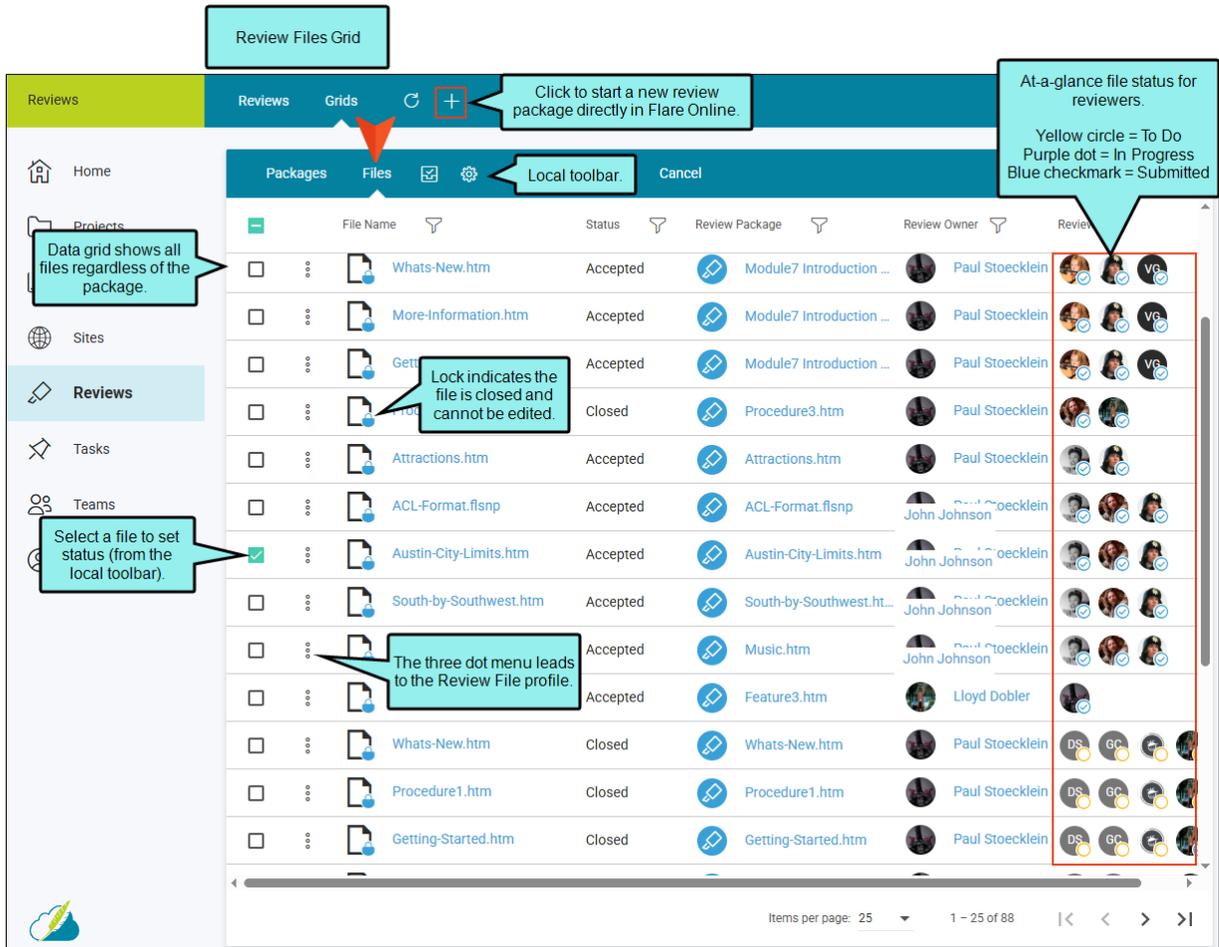
The main difference between the two grids is a matter of perspective—for managing reviews. You can do many of the same functions (e.g., adding reviewers, setting statuses, adding files), but the grid you use depends on if you want a package- or files-centric view of the project. Of course, there are some things unique to each grid. For example, if you have a file in a package but are not sure which one, you can search the Files grid to find it.

- **Packages Grid** Displays every review package. In the Packages local toolbar you can set package status , delete review packages , and customize grid columns . Columns include: Name, Status, Review Owner, Reviewers, Project, Branch, Commit ID, Created On, Description, and TOC Path. Many of the columns include a filtering function  for finding specific items. In the main toolbar, you can click  to create a new review package.

The Packages grid also includes a Create Review Package button where you can start a new package.



- Files Grid** Displays all files sent for review. In the Files local toolbar you can set file status , and customize grid columns . Columns include: File Name, Status, Path, Review Package, My Status, My Submitted Date, All Users Status, All Users Submitted Date, Review Owner, Created On, Reviewers, Project, Branch, and Commit ID. Many of the columns include a filtering function  for finding specific items. In the main toolbar, you can click  to create a new review package.



Review Files Grid

Reviews Grids  Click to start a new review package directly in Flare Online.

Local toolbar:  Cancel

At-a-glance file status for reviewers:
 Yellow circle = To Do
 Purple dot = In Progress
 Blue checkmark = Submitted

Data grid shows all files regardless of the package.

Lock indicates the file is closed and cannot be edited.

Select a file to set status (from the local toolbar).

The three dot menu leads to the Review File profile.

File Name	Status	Review Package	Review Owner	Reviewers
Whats-New.htm	Accepted	Module7 Introduction ...	Paul Stoecklein	
More-Information.htm	Accepted	Module7 Introduction ...	Paul Stoecklein	
Gett...	Accepted	Module7 Introduction ...	Paul Stoecklein	
Proced...	Closed	Procedure3.htm	Paul Stoecklein	
Attractions.htm	Accepted	Attractions.htm	Paul Stoecklein	
ACL-Format.flstp	Accepted	ACL-Format.flstp	John Johnson	
Austin-City-Limits.htm	Accepted	Austin-City-Limits.htm	John Johnson	
South-by-Southwest.htm	Accepted	South-by-Southwest.ht...	John Johnson	
Music.htm	Accepted	Music.htm	John Johnson	
Feature3.htm	Accepted	Feature3.htm	Lloyd Dobler	
Whats-New.htm	Closed	Whats-New.htm	Paul Stoecklein	
Procedure1.htm	Closed	Procedure1.htm	Paul Stoecklein	
Getting-Started.htm	Closed	Getting-Started.htm	Paul Stoecklein	

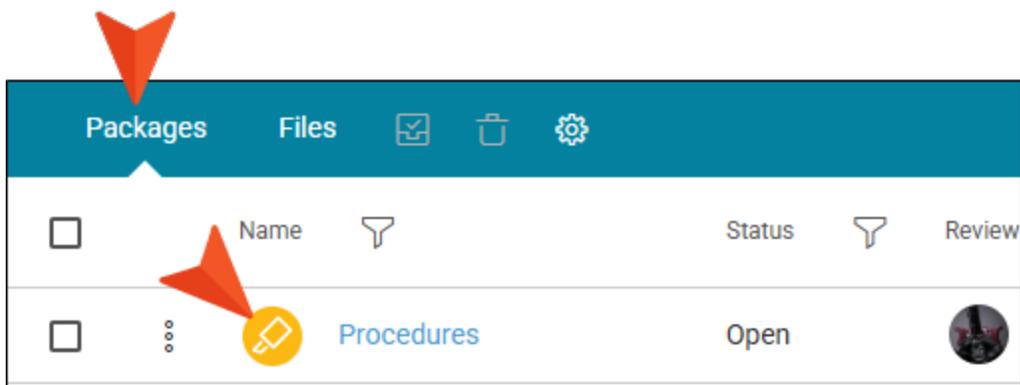
Items per page: 25 1 - 25 of 88

Updating Review Packages

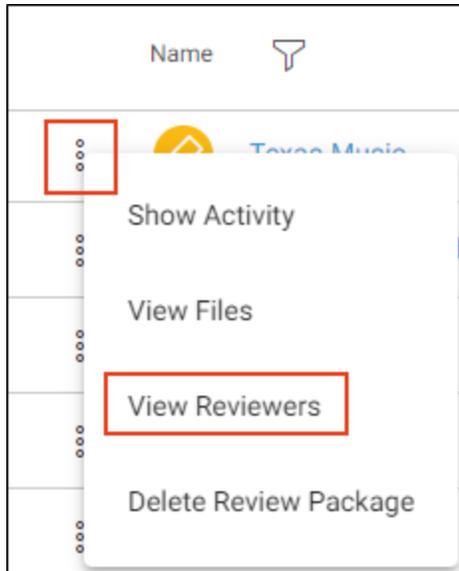
With the permission to manage reviews, you can make changes to a review package after it has been created and uploaded to Flare Online.

How to Add or Remove Reviewers

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Grids**.
3. Select **Packages**.
4. For the review package you want to add reviewers to or remove reviewers from, select its icon (under the **Name** column). The Review Package profile opens.

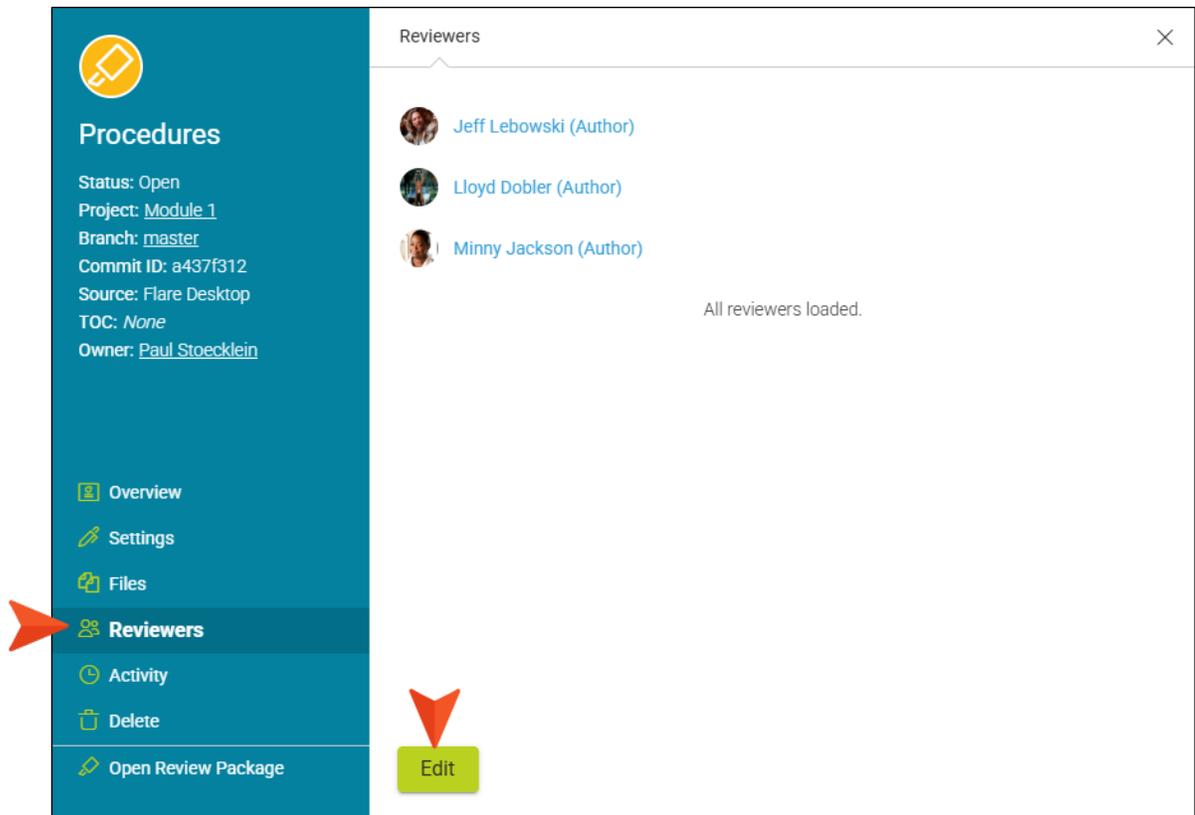


 **NOTE** Alternatively, you can click the three dot vertical menu and select **View Reviewers**. This way also opens the Review Package profile, directly to the Reviewers option.



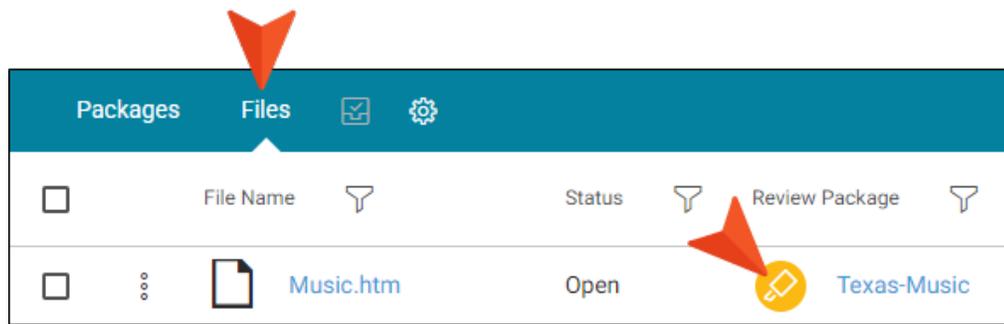
5. Select **Reviewers**.

6. On the right, the current reviewers are listed. Select **Edit**.



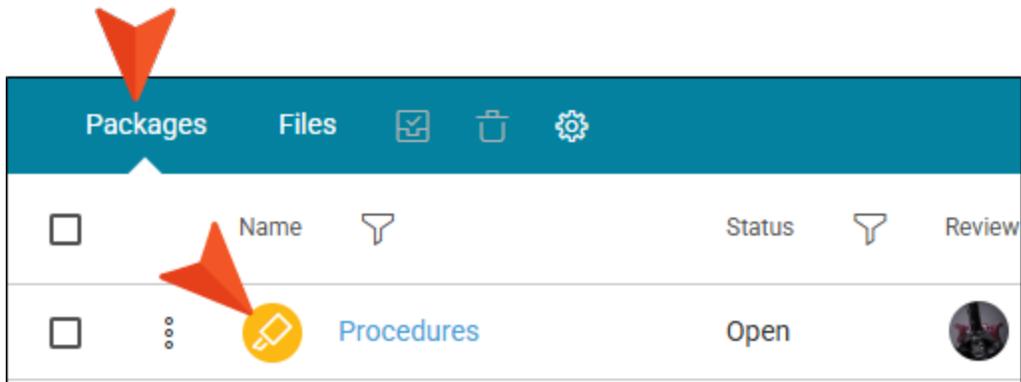
7. From the list of available reviewers, select to add a reviewer (or deselect to remove a reviewer.) Click **Save**.

 **NOTE** You can also use the Files grid to add or remove reviewers. The process is the same except you would select the review package icon under the Review Package column.

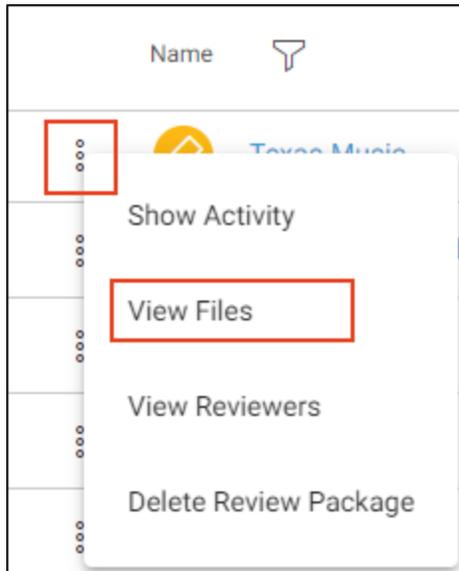


How to Add or Remove Files

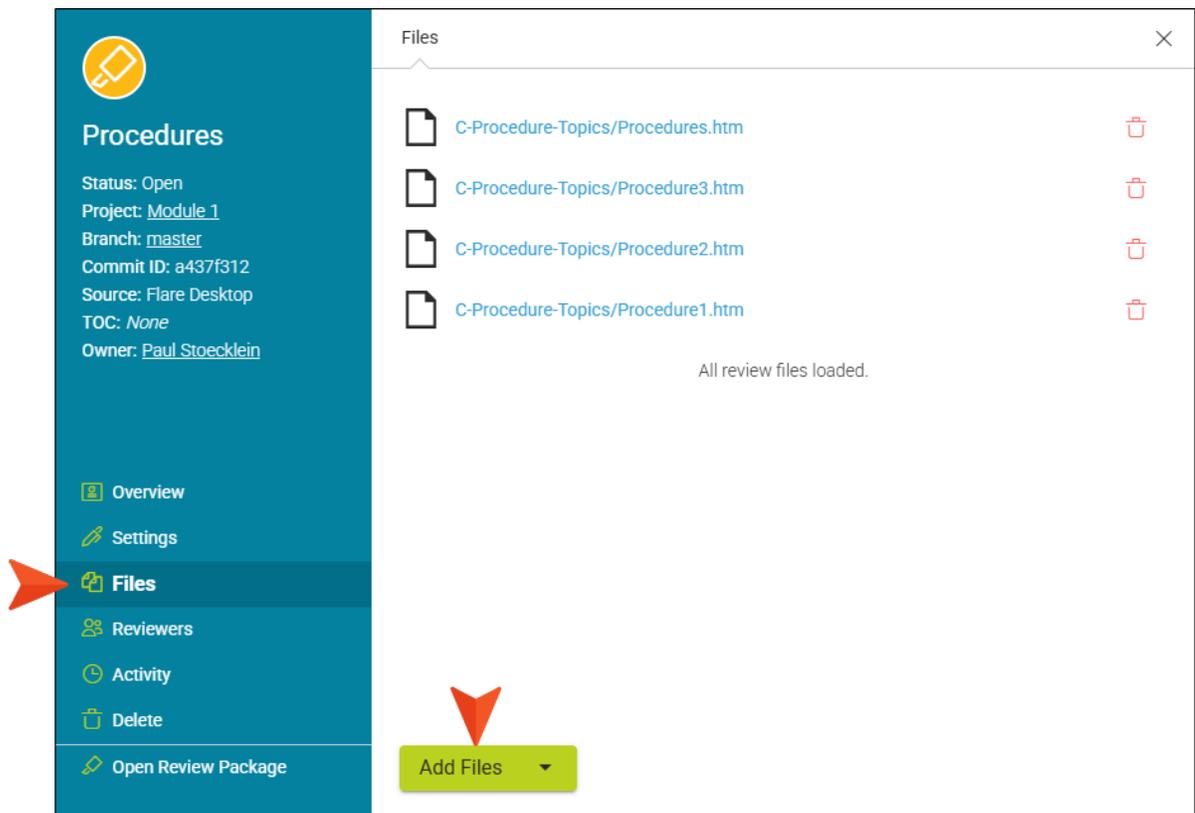
1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Grids**.
3. Select **Packages**.
4. For the review package you want to add files to or remove files from, select its icon (under the **Name** column). The Review Package profile opens.



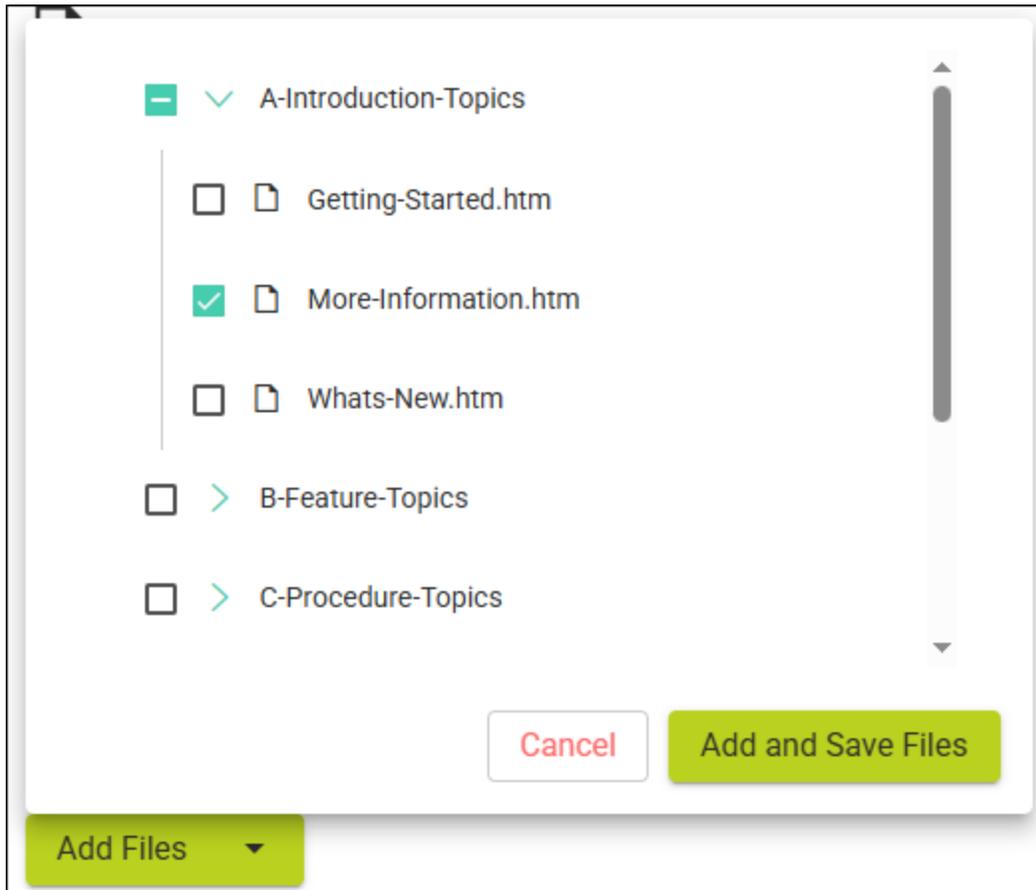
 **NOTE** Alternatively, you can click the three dot vertical menu and select **View Files**. This way also opens the Review Package profile, directly to the Files option.



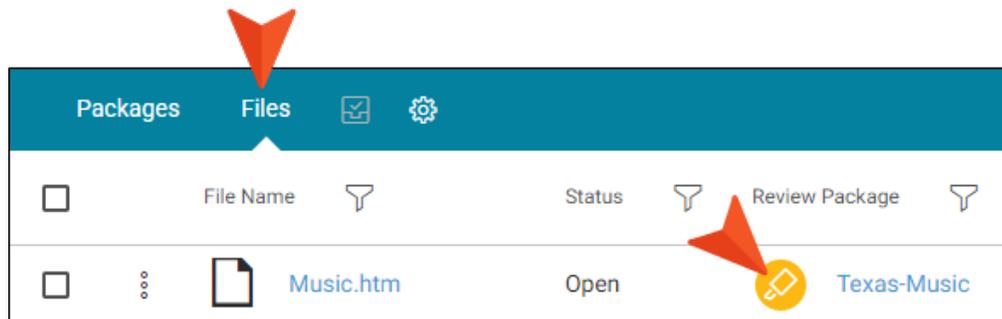
5. Select **Files**.
6. On the right, the current files are listed. Select **Add Files**. Also, to delete a file, you can click the trash icon to the right of the file.



7. From the popup, select other files from the project to add to the review (or deselect to remove files.) Click **Add and Save Files**.

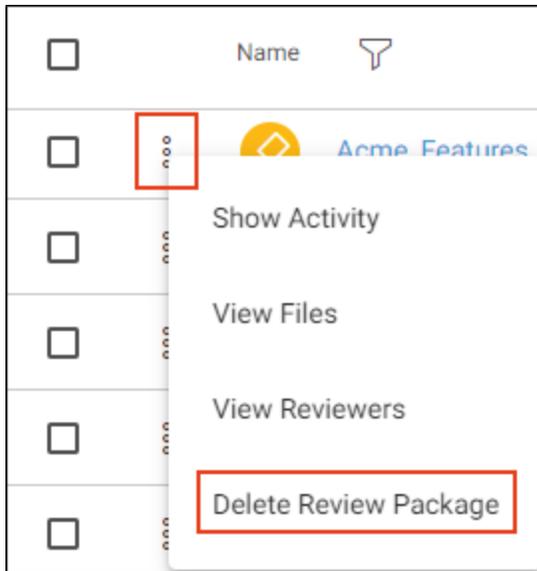


 **NOTE** You can also use the Files grid to add files. The process is the same except you would select the review package icon under the Review Package column.

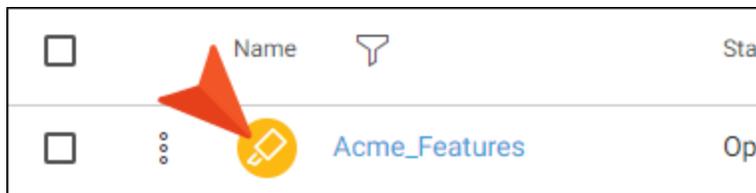


How to Delete a Package

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Grids**.
3. Select **Packages**.
4. Do one of the following:
 - From the package row click , and select **Delete Review Package**. The Review Package profile opens to the Delete option.



- From the package row, click the package name icon.

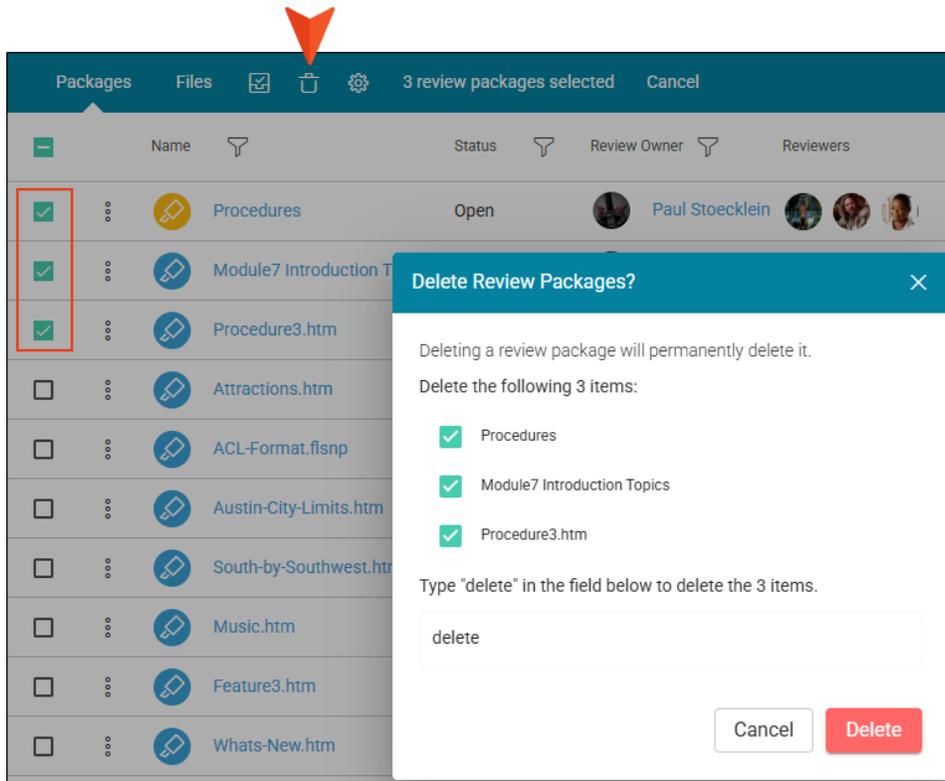


The Review Package profile opens to the Overview option. Select the **Delete** Option.

5. Confirm the delete action, and click **Delete**. Deleting a review package cannot be undone.

 **NOTE** Alternatively, you can select one or multiple review packages to delete.

1. Select the package row. This action enables options in the top toolbar.
2. Click **Delete Review Packages**.
3. In the dialog, confirm the delete action, and click **Delete**.



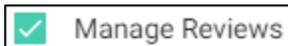
 **NOTE** If you add or remove files associated with a review package, keep the following in mind—deleting a file is a "soft" delete. If you add the same file back, it "undeletes" the file. But if a reviewer is added or removed while it is deleted, those changes are reflected in the package if the file is added back. If a package is closed and then reopened, you can opt to reset file and reviewer statuses to the To Do state.

Creating Review Packages

There are a few ways to create review packages (e.g., from Flare Desktop to Flare Online, directly in Flare Online). No way is better than the other but there are some considerations. For example, if you are using Flare Desktop, creating a review package in Flare Desktop is convenient. If a TOC is included in a review package, reviewers have the added benefit of being able to view files for review in the TOC view. When a package is created from Flare Desktop's TOC Editor, it is favorable to select single or multiple TOC nodes. Conversely, if you are working in Flare Online, it might be better to create a review package in Flare Online. The disadvantage is that you select individual files for review, and then separately select a TOC.

Permission Required?

For this activity, you must have the following permission setting:



Sending Review Packages (Flare Online vs. Flare Desktop)

Send Review Packages Via...	Caveats
Flare Online's Review Package Wizard	You first select files for review, and then select a TOC. When selecting files, you need to know in advance what TOC those files are associated with to select it in the subsequent wizard screen. Selecting a TOC is optional, and only necessary if you want reviewers to be able to review files in the TOC view.

Flare Desktop's TOC Editor

Sends individually selected files or multiple files and folder nodes as a review package with a TOC associated with it. This enables reviewers to open files in Flare Online's TOC view which provides better context for content. In this case, the TOC drop-down in the Send Files for Review Wizard defaults to pick the TOC that the wizard is initiated from.



A screenshot of a dropdown menu labeled 'TOC:'. The selected option is 'Online-TOC'.

Flare Desktop's Review Ribbon

Sends individually selected files, or folders with multiple files selected within them as review packages. The files have no association with a TOC. In this case, the TOC drop-down in the Send Files for Review Wizard defaults to (none). However, you can choose a TOC for the review package if you want to (for reviews to display in a TOC view in Flare Online).



A screenshot of a dropdown menu labeled 'TOC:'. The selected option is '(none)'.

 **NOTE** If you decide to create a review package in Flare Online, keep in mind that even though the process starts in Flare Online, it still ends in Flare Desktop (just like if you initiated the process from Flare Desktop).

How to Create a Review Package in Flare Online

Owners can initiate the review process in Flare Online directly, bypassing Flare Desktop as the starting point.

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Grids**.
3. Select **Packages** (if not already selected).
4. In the upper-right corner, select **Create Review Package**. The wizard opens.
5. At a minimum, enter a **Name**, and select a **Project** and **Branch**. Click **Next**. You can optionally enter a review package description.

 **NOTE** You can only create a review package for a project in Flare Online that you are a part of (i.e., a user or a team member of the project).

6. Expand the content folders to select files for the package. You can also select a folder to choose everything under it. Click **Next**.
7. (Optional) You can choose a **Table of Contents** that is associated with the files selected. This is only necessary if you want reviewers to be able to review files using the TOC view in Flare Online. Click **Next**.
8. (Optional) Select reviewers. Click **Next**.
9. Review the summary of the package. Click **Create Review Package**. The new review package displays in Flare Online's Reviews page.

 **NOTE** You can optionally click the **Back** button on any of the wizard screens to change review package information before creating it.

 **NOTE** Depending on what you need to do, keep in mind that you can edit existing review packages rather than create new ones. For example, you can add and delete files or add and remove reviewers using the Review Packages profile.

Viewing Review Profiles

For authors, the Review Package profile and the Review File profile are available to view package review settings. In order to make changes, then having permission to manage reviews is required.

Permission Required?

For this activity, you must have the following permission setting:



Review Package Profile

You can view a profile for a review package. It snapshots a working overview of the package and allows you to perform activities for managing a review package. Some useful tasks include adding or deleting files, adding or removing reviewers, and setting package status. Note that if a review package is set to closed, then it closes all the files within it.

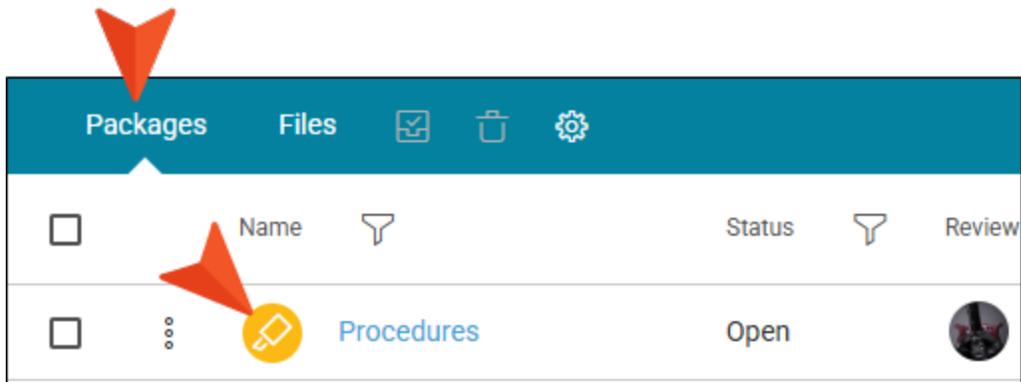
The screenshot shows the 'Procedures' review package profile. On the left is a navigation sidebar with options: Overview (selected), Settings, Files, Reviewers, Activity, Delete, and Open Review Package. The main content area shows an 'Overview' section with a progress bar indicating '0/4 Files Submitted', '3 To Do', and '1 In Progress'. Below this is a table of files:

File Name	Status	Reviewers
Procedures.htm	Open	[Reviewer Icons]
Procedure3.htm	Open	[Reviewer Icons]
Procedure2.htm	Open	[Reviewer Icons]
Procedure1.htm	Open	[Reviewer Icons]

Callout boxes provide additional context: 'Summary of review package.' points to the sidebar metadata; 'Options to select. Its corresponding page displays on the right.' points to the 'Overview' menu item; 'Select to see File Progress, My Progress (option for reviewers only), or All Users Progress.' points to the 'My Progress' dropdown menu.

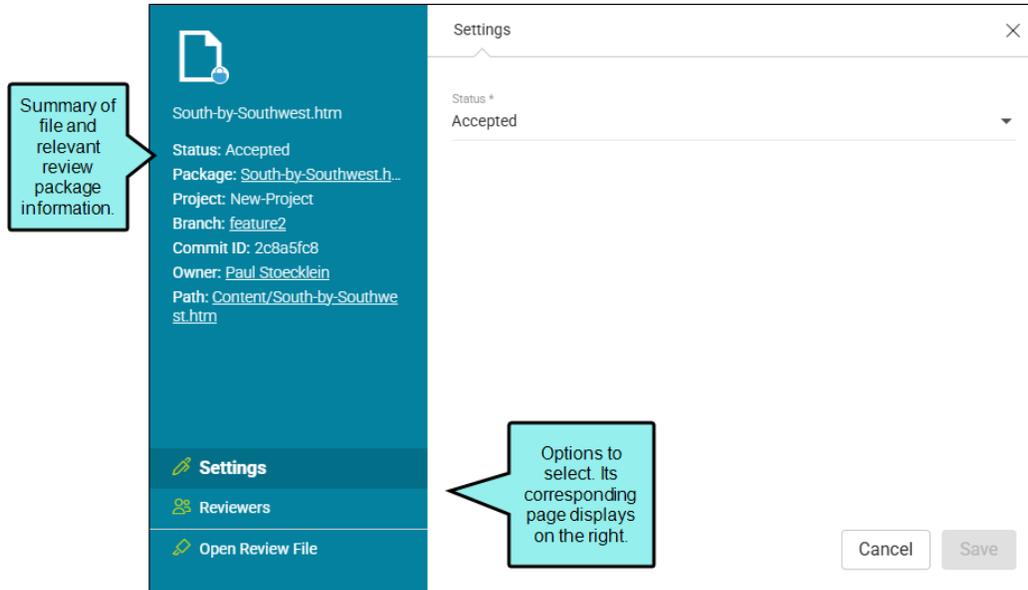
How to View a Review Package Profile

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Grids**.
3. Select **Packages**.
4. Click the review package icon (under the **Name** column).



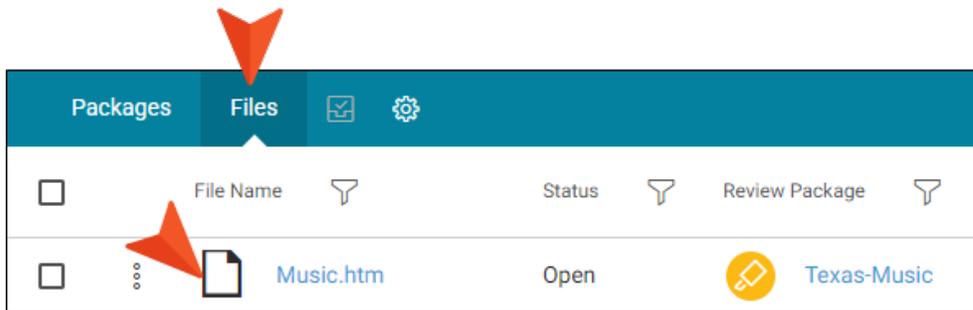
Review File Profile

You can view a profile for a file in a review package. It opens with settings that show the review status of the file. You can also see who's assigned as a reviewer for the file (and click to view the user profile), see recent file activity, and open the review file directly from the Review File profile.



How to View a Review File Profile

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Grids**.
3. Select **Files**.
4. Next to the file of interest, click the file icon (under the **File Name** column).



Updating Review Status

One of the benefits of having noticeable statuses throughout Reviews in Flare Online, is for authors who are managing review packages to set statuses on-the-fly if necessary.

Permission Required?

For this activity, you must have the following permission setting:



Available Review Statuses

Review Package Statuses

- **Open** The review package is open for review. This is the default setting.
- **Closed** All files in the package are set to a closed status (i.e., the package can no longer be reviewed). This can be set in the Review Package profile to put a review back into Flare Desktop's inbox as is (i.e., the review is not complete) and archive the review at the same time.

Review File Statuses

- **Open** The file is open for review. This is the default setting.
- **Closed** The file is closed for review.
- **Accepted** The file is accepted in Flare Desktop.

Reviewer Statuses

- **To Do** The reviewer has not started editing the file yet. The status color is yellow.
- **In Progress** The reviewer has started editing the file, but has not submitted it. The status color is purple.
- **Submitted** The reviewer has edited the file and submitted it. The reviewer can still edit the file until the owner closes it. The status color is blue.

Setting Status

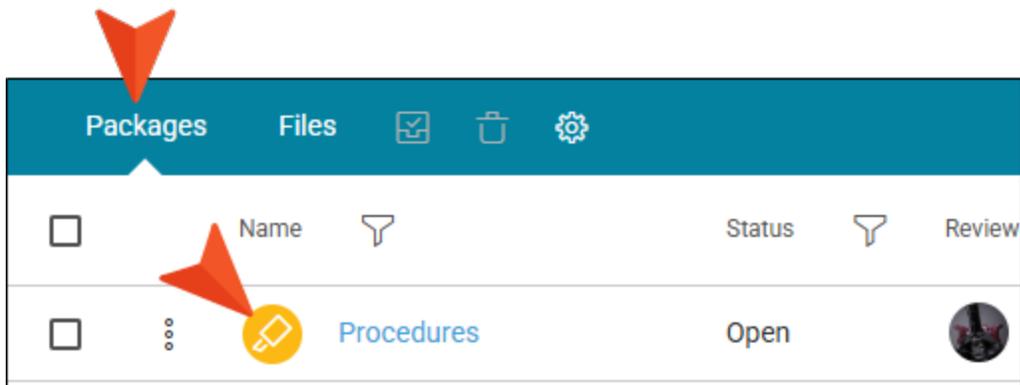
The status can be set singularly through the package or file profile dialogs, or in bulk through the set status dialogs.

How to Set the Package Status

In the review process, statuses are updated behind the scenes for the most part. However, there might be circumstances from a management perspective where a status setting needs to be updated manually.

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Grids**.
3. Select **Packages**.

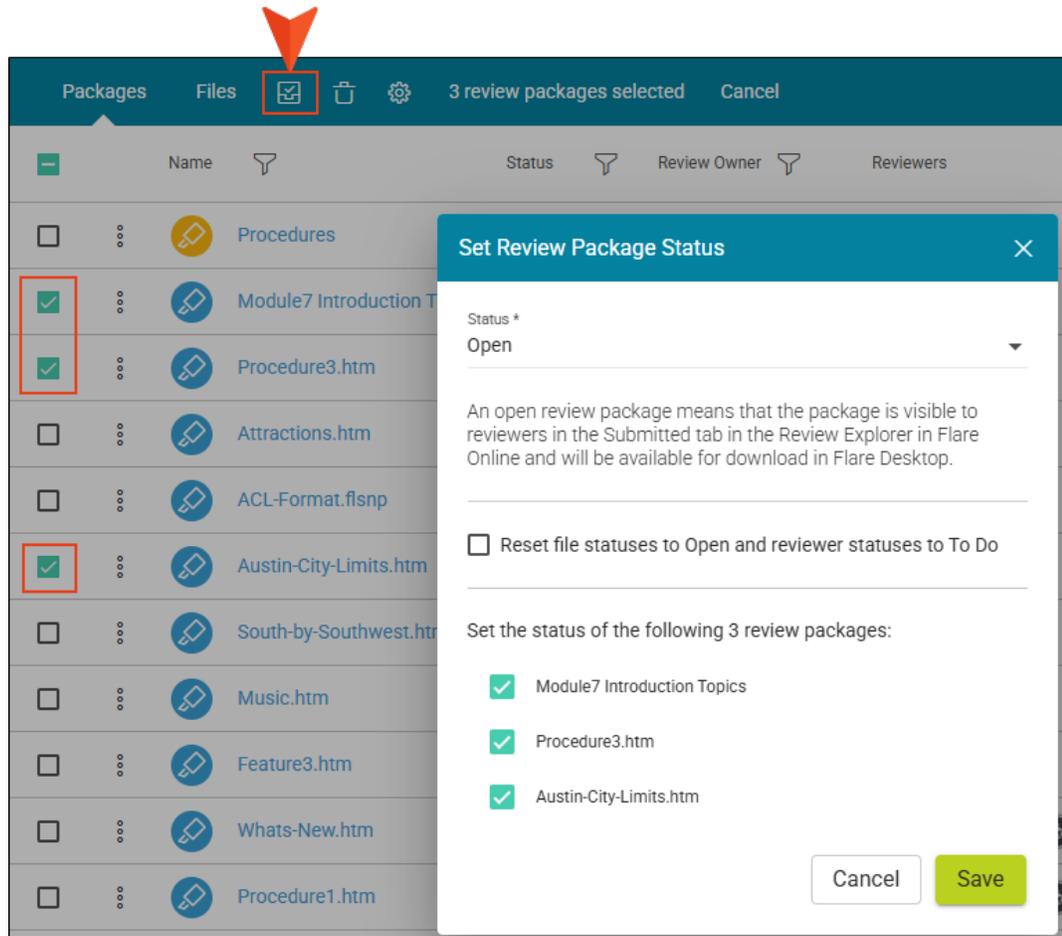
4. For the review package you want to set the status on, select its icon (under the **Name** column). The Review Package profile opens.



5. Select **Settings**.
6. On the right, select from the **Status** drop-down (i.e., open, closed). Click **Save**.
 - **Open** The review package is open for review. This is the default setting.
 - **Closed** All files in the package are set to a closed status (i.e., the package can no longer be reviewed).

 **NOTE** Alternatively, you can set the package status for multiple packages (in bulk) from the Packages grid local toolbar.

1. In the package row, select the check box.
2. From the local toolbar, select **Set review package status**.
3. In the Set Review Package Status dialog, select the drop-down and update the status.

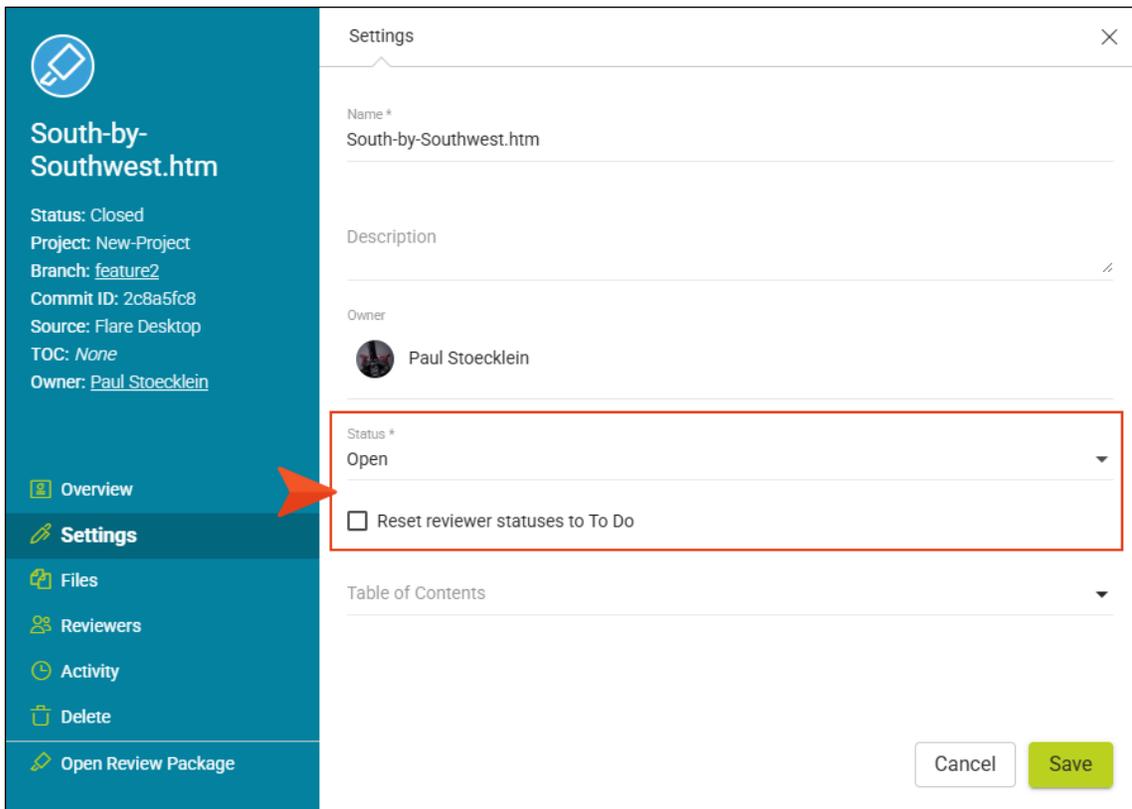


4. Click **Save**.

☆ **EXAMPLE** If a reviewer is working a package that is "In Progress," and edits have been made, an author managing the review can set the package to a "Closed" state.

The screenshot shows a 'Settings' dialog box for a review package. On the left is a teal sidebar with the package name 'South-by-Southwest.htm' and various metadata: Status: Closed, Project: New-Project, Branch: feature2, Commit ID: 2c8a5fc8, Source: Flare Desktop, TOC: None, and Owner: Paul Stoecklein. Below this are navigation options: Overview, Settings (highlighted), Files, Reviewers, Activity, Delete, and Open Review Package. The main content area has fields for Name (South-by-Southwest.htm), Description, and Owner (Paul Stoecklein). A 'Status' dropdown menu is highlighted with a red box and an orange arrow, showing 'Closed' selected. At the bottom right are 'Cancel' and 'Save' buttons.

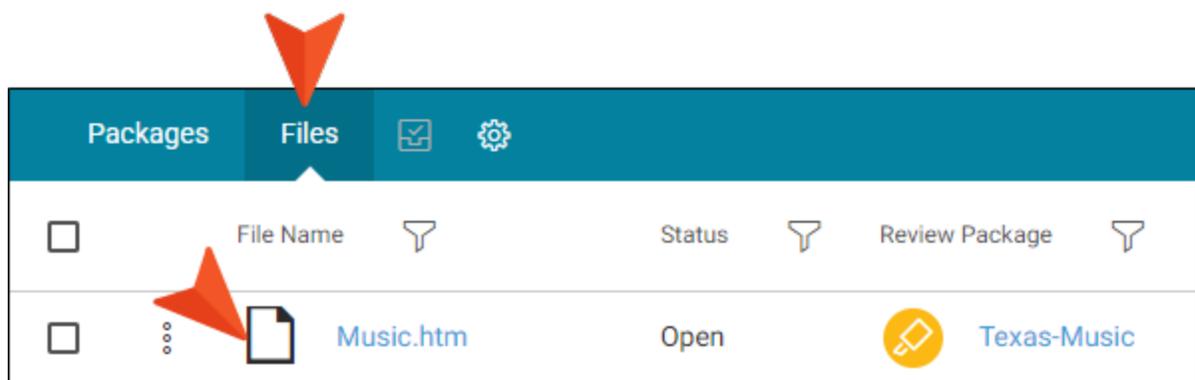
- ☆ Then, the author could decide to set the package back into an "Open" state. Using the Settings option for updating status, the author has the choice to either keep the previous reviewer statuses by not selecting the given check box, or that person can select the check box and all of the files statuses and reviewer statuses will be set back to the original "To Do" status for that package.



How to Set the File Status

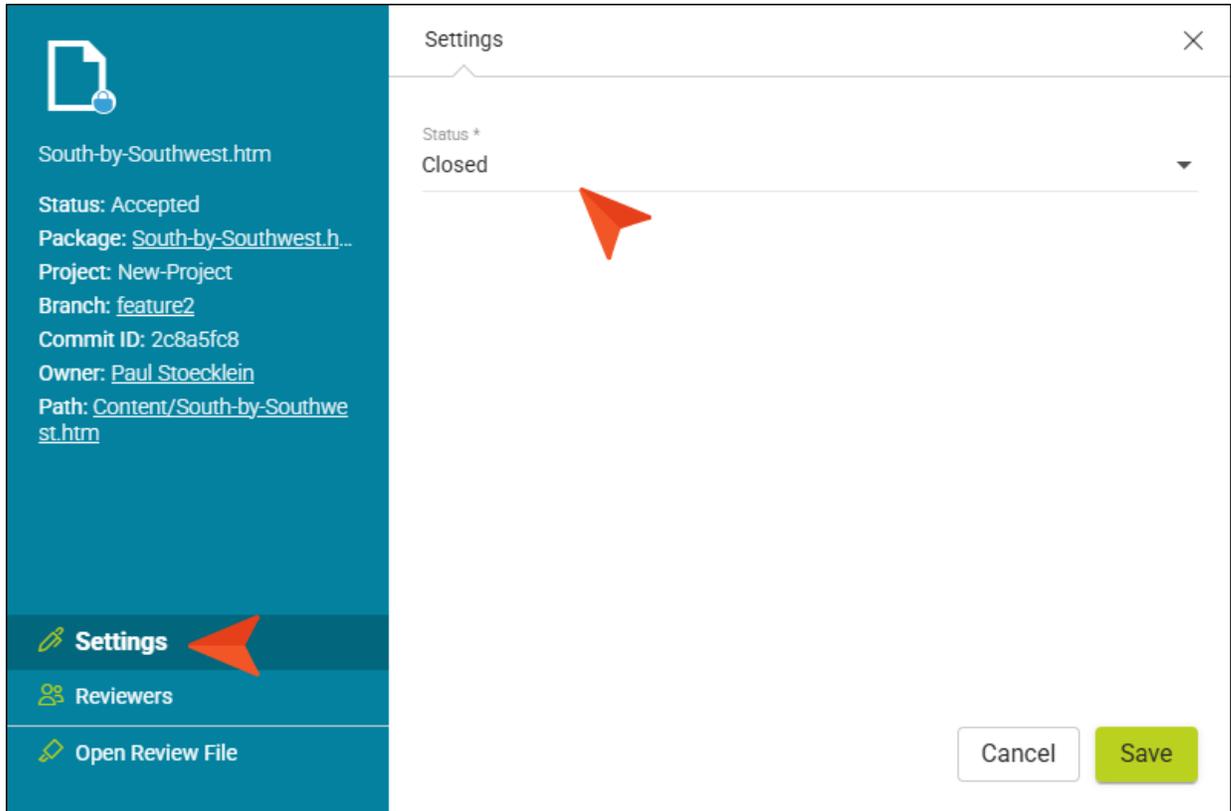
In the review process, statuses are updated behind the scenes for the most part. However, there might be circumstances from a management perspective where a status setting needs to be updated manually.

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Grids**.
3. Select **Files**.
4. For the file you want to change the status on, select its icon (under the **File Name** column). The Review File Profile opens.



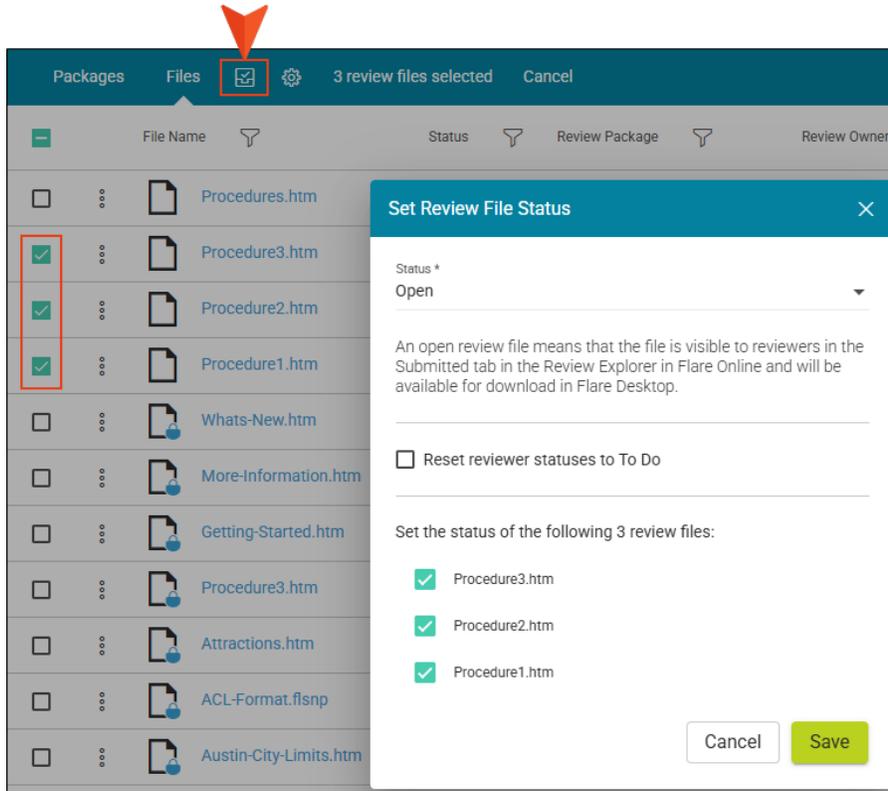
5. Select **Settings**.

6. On the right, select from the **Status** drop-down. Click **Save**.
- **Open** The file is open for review. This is the default setting.
 - **Closed** The file is closed for review.
 - **Accepted** The file is accepted in Flare Desktop.



 **NOTE** Alternatively, set the file status from the Files grid local toolbar.

1. In the file row, select the check box.
2. From the local toolbar, select **Set review file status**.
3. In the Set Review File Status dialog, select the drop-down and update the status.



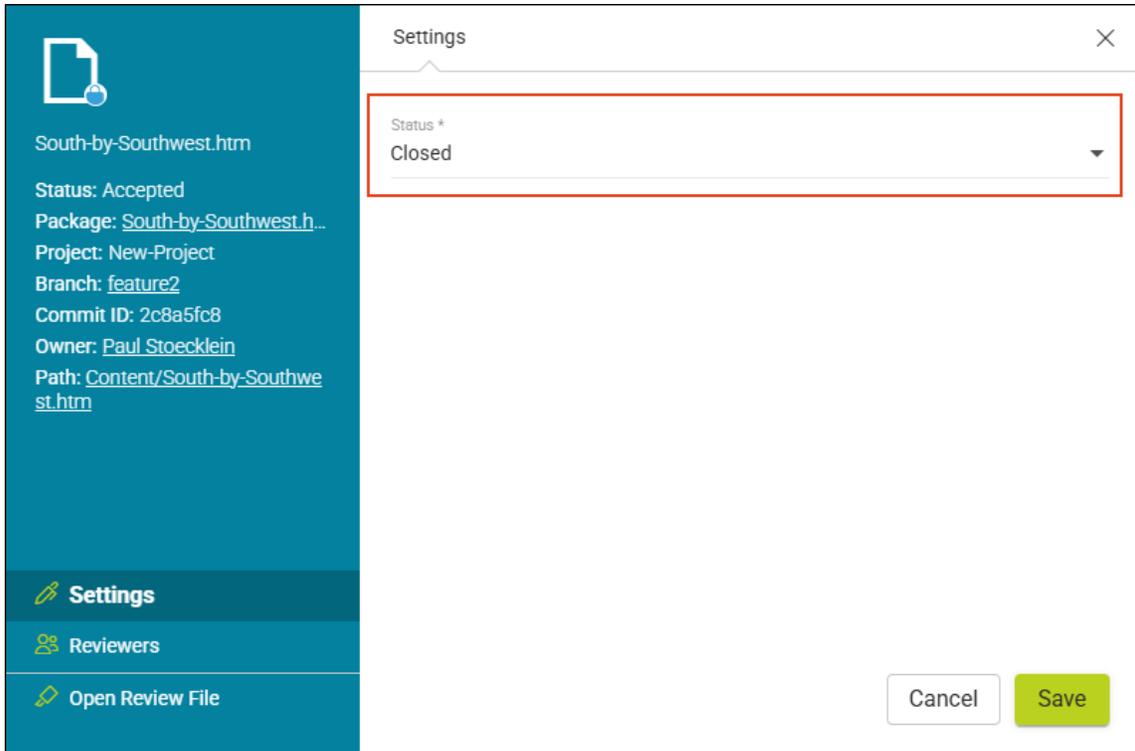
4. Click **Save**.

Even more options are:

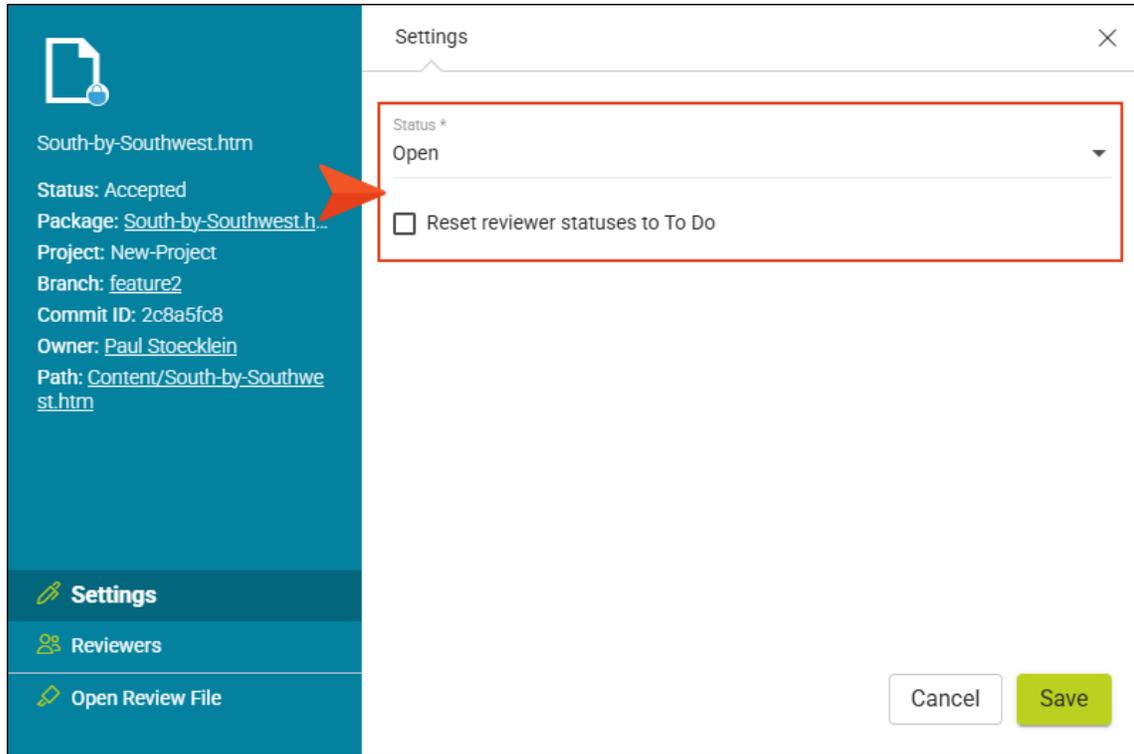
In the Files grid, you can click the review package icon under the Review Package column. Or in the Packages grid, you can click the review package icon under the **Name** column. In both cases, the Review Package profile opens. If you select the **Files** option, you can click the file icon to open the Review File profile to update file status.

 **NOTE** From the reviewer's perspective, the changing of the status is done automatically as the reviewer works through the review. After contributing to the file, the reviewer can simply press the Submit button. Reviewers do not have to manually update their file status.

 **EXAMPLE** If a reviewer is working a file that is "In Progress," and edits have been made, an author managing the review can set the file to a "Closed" state.



- ☆ Then, the author could decide to set the file back into an "Open" state. Using the Settings option for updating status, the author has the choice to either keep the previous reviewer statuses by not selecting the given check box, or that person can select the check box and all of the reviewer statuses will be set back to the original "To Do" status for that file.



APPENDIX

PDFs

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

AI Assist Guide

Analytics Guide

Authoring Guide

Branding Guide

Building Output Guide

Checklists Guide

Conditions Guide

Getting Started Guide

*Images and Multimedia
Guide*

*License Management and
Purchasing Guide*

Links Guide

Projects Guide

Reports Guide

Reviews Guide

Security Whitepaper

Sites Guide

Snippets Guide

Source Control Guide

Targets Guide

Tasks Guide

Topics Guide

Translation Guide

Users and Teams Guide

Variables Guide

What's New Guide

Widgets Guide