madcap software

USER GUIDE

MADCAP FLARE ONLINE

Reviews Guide

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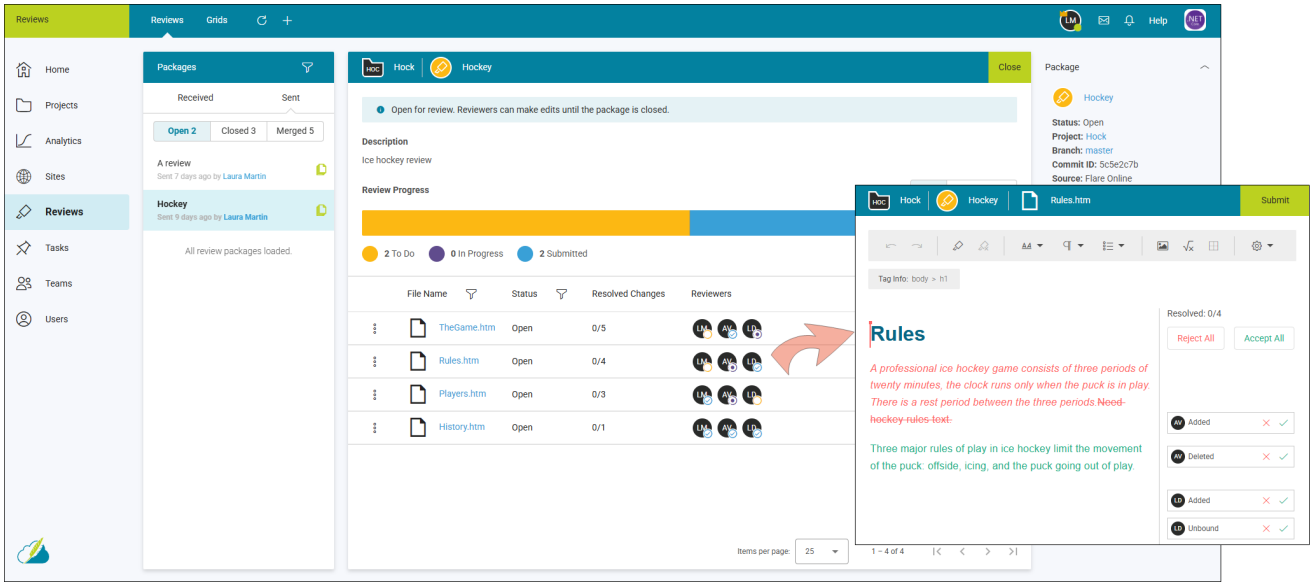
CHAPTER 1

Introduction

Flare Online supports a thorough review process from start to finish in the browser. Using Flare Online for reviews lets teams efficiently incorporate reviewed changes into projects and finalize content faster.

Files are bundled in a review package, which is a container that can include as little as one or hundreds of files (e.g., topics, snippets). 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.

Owners (or authors) can create review packages and send them to reviewers. Reviewers can open files for review, modify them in the Review Editor, and submit the files back. Owners can make decisions about file level tracked changes, resolve edits in real-time collaboration, monitor review activity with grids (e.g., who is reviewing, status of files), and merge files into the workspace to ultimately close the review loop.



General Information

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NOTE If you want to use Flare Desktop as the base application for reviews along with Flare Online, refer to the Flare Desktop documentation as it captures the review workflow and the activities between the two products. See the Flare Desktop Help system.

CHAPTER 2

General Information for Reviews

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

This chapter discusses the following:

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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

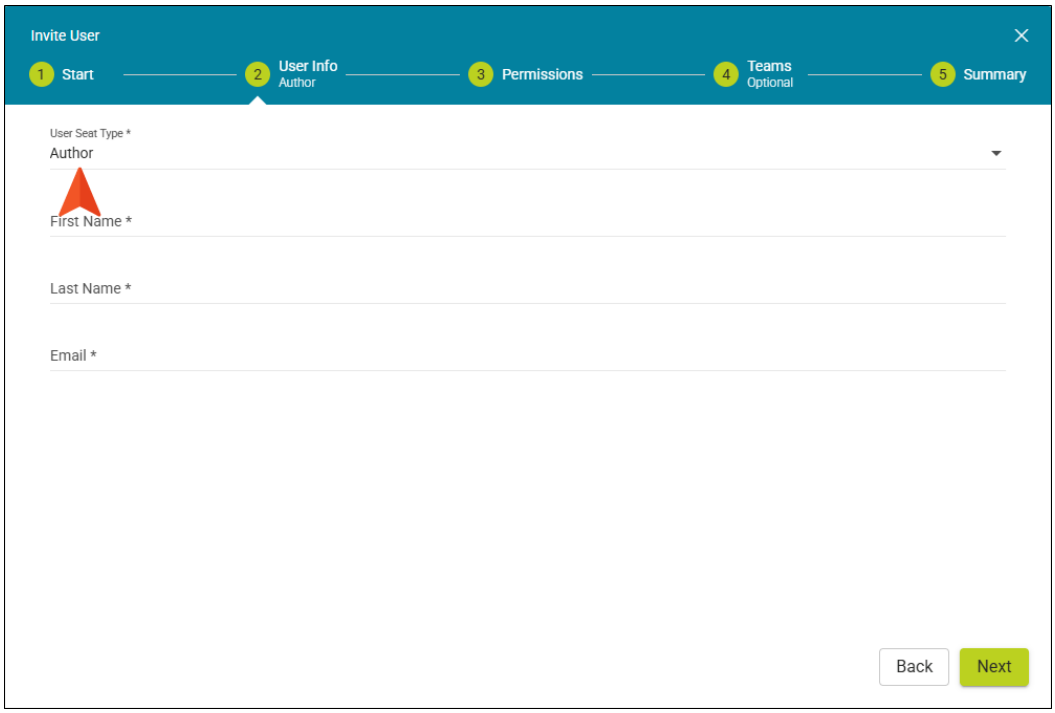
The Flare Online review process involves owners (those initiating the process) and reviewers (those making changes and comments in the review package files). Reviewers can be either authors or subject matter experts.

An owner (i.e., the original author) by default holds an author user seat, and will see the review package in the Sent pane. Owners can also be reviewers, and if this is the case, the review package will display in both the Received and Sent panes. Owners are not required to have the Manage Reviews permission and can modify anything about a package or the files within it.

Reviewers who are authors with the Manage Reviews permission can also interact with the data grids (i.e., packages, files) and make changes to review packages.

Inviting Reviewers

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



- 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 manage the entire review process directly in Flare Online. This includes creating review packages, monitoring reviews, accessing grids for information and progress, accepting or rejecting tracked changes, merging files to the workspace, and closing-out the review. 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.

Reviews Main Page

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

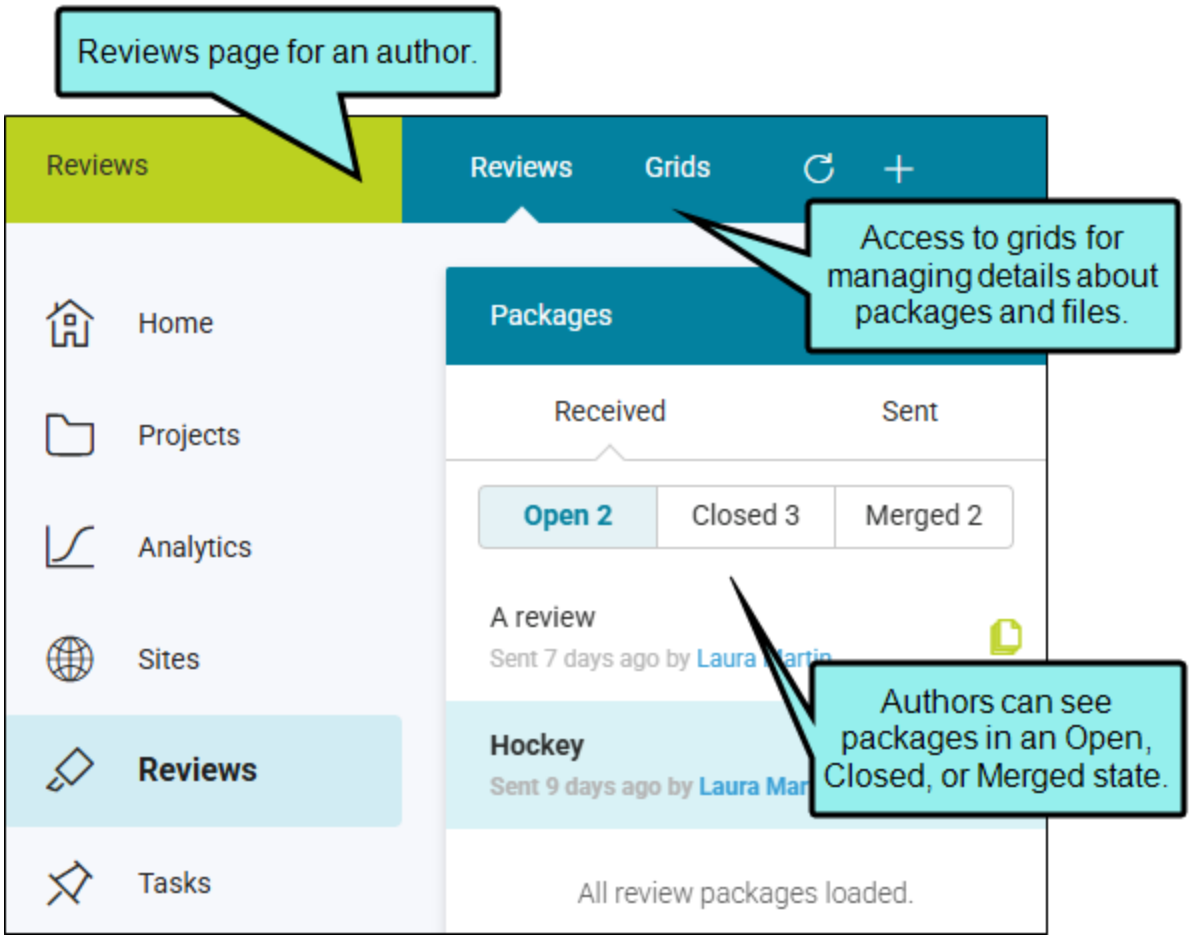
Review Explorer

When you first open Reviews, any packages that involve you display in the Review Explorer. What you see and interact with on the Reviews main page depends on your user type.

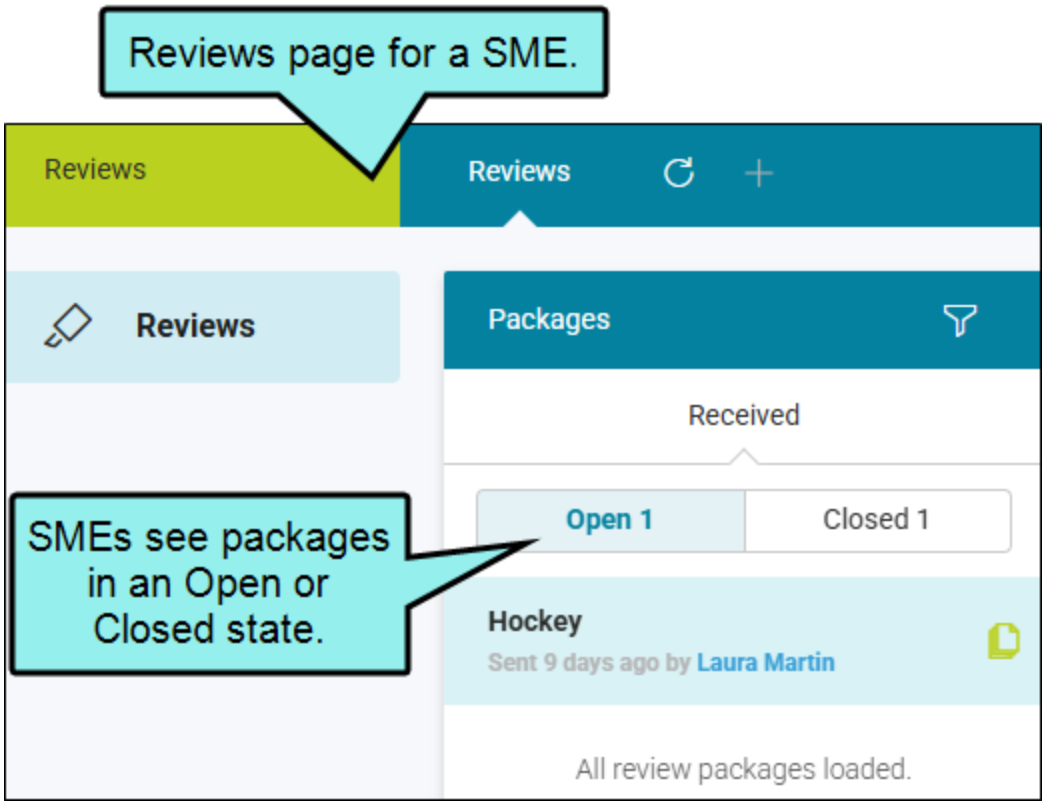
An author can see review packages in the Received or Sent panes. Meaning, if you are the owner of a package it lists in the Sent pane, and if you are a reviewer (or the owner is also a reviewer), the package lists in the Received page.

- Received This pane displays packages that the reviewer needs to review.
- Sent This pane displays packages that the owner has sent to others for review.

Using the tabs beneath the Received and Sent panes, authors can look at open, closed, and merged packages, and view the corresponding review package overview. In addition to the Reviews grid, authors have access to package and file grids, and can create, close, merge, and delete packages in Flare Online.



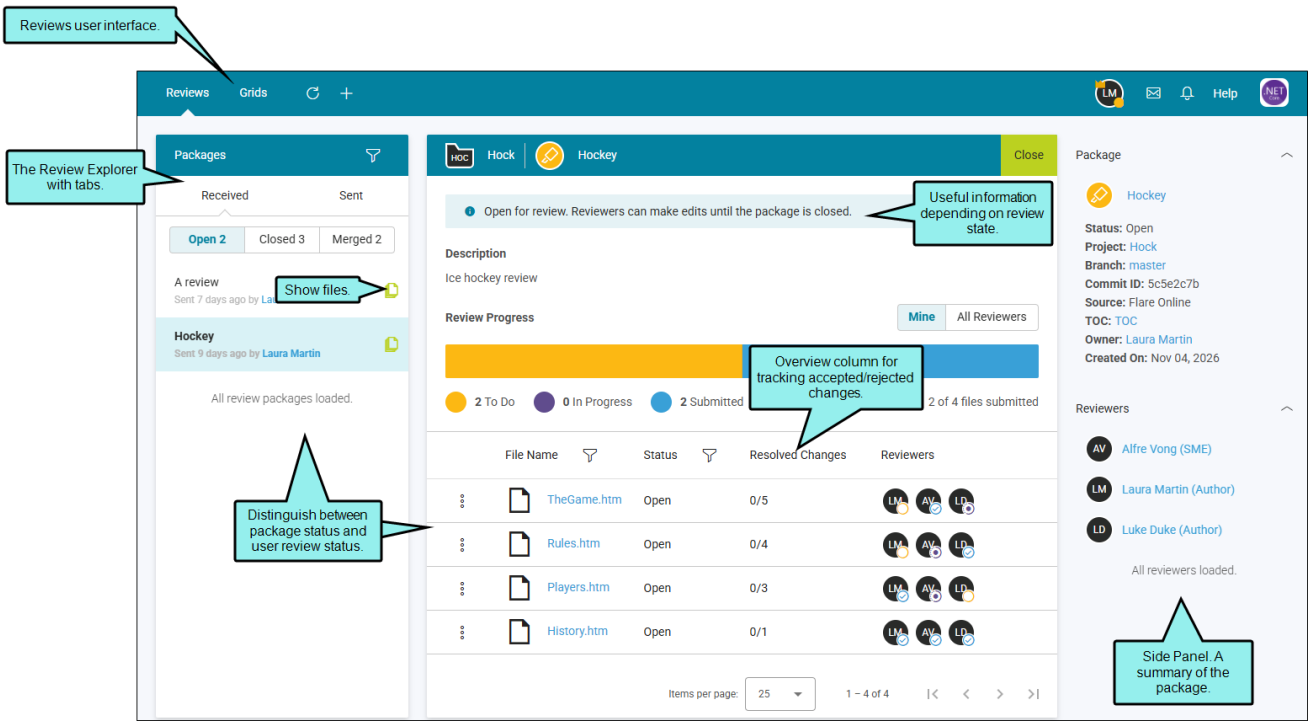
Conversely, a subject matter expert (SME) can see review packages to take action on in the Received pane. A SME can also use tabs to look at open or closed review packages (and associated files), and view the corresponding review package overview.



- **Open** Reviewers can make edits.
- **Closed** Stops reviewers from editing.
- **Merged** Sends changes to the workspace.

If you click the review package, an overview page displays to the right with a chart, files, status, tracked changes, and reviewers 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.

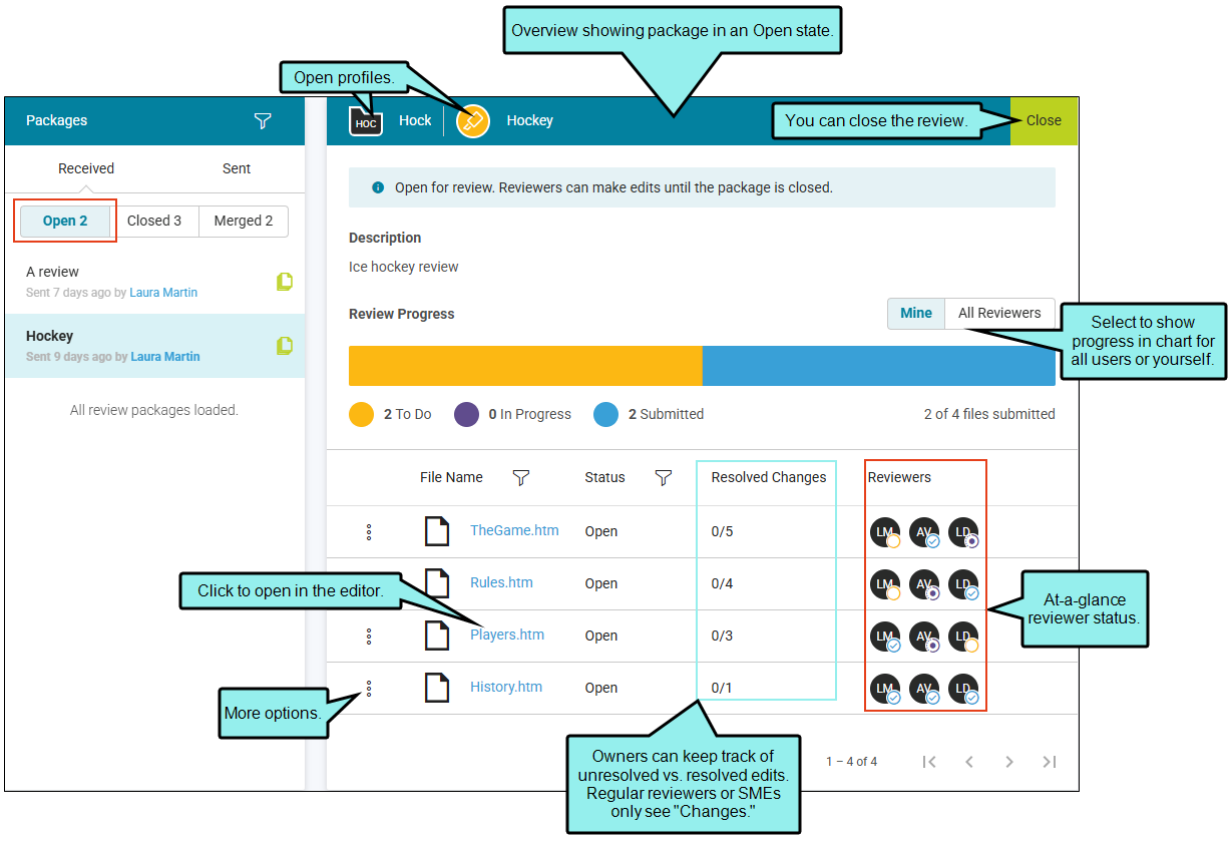


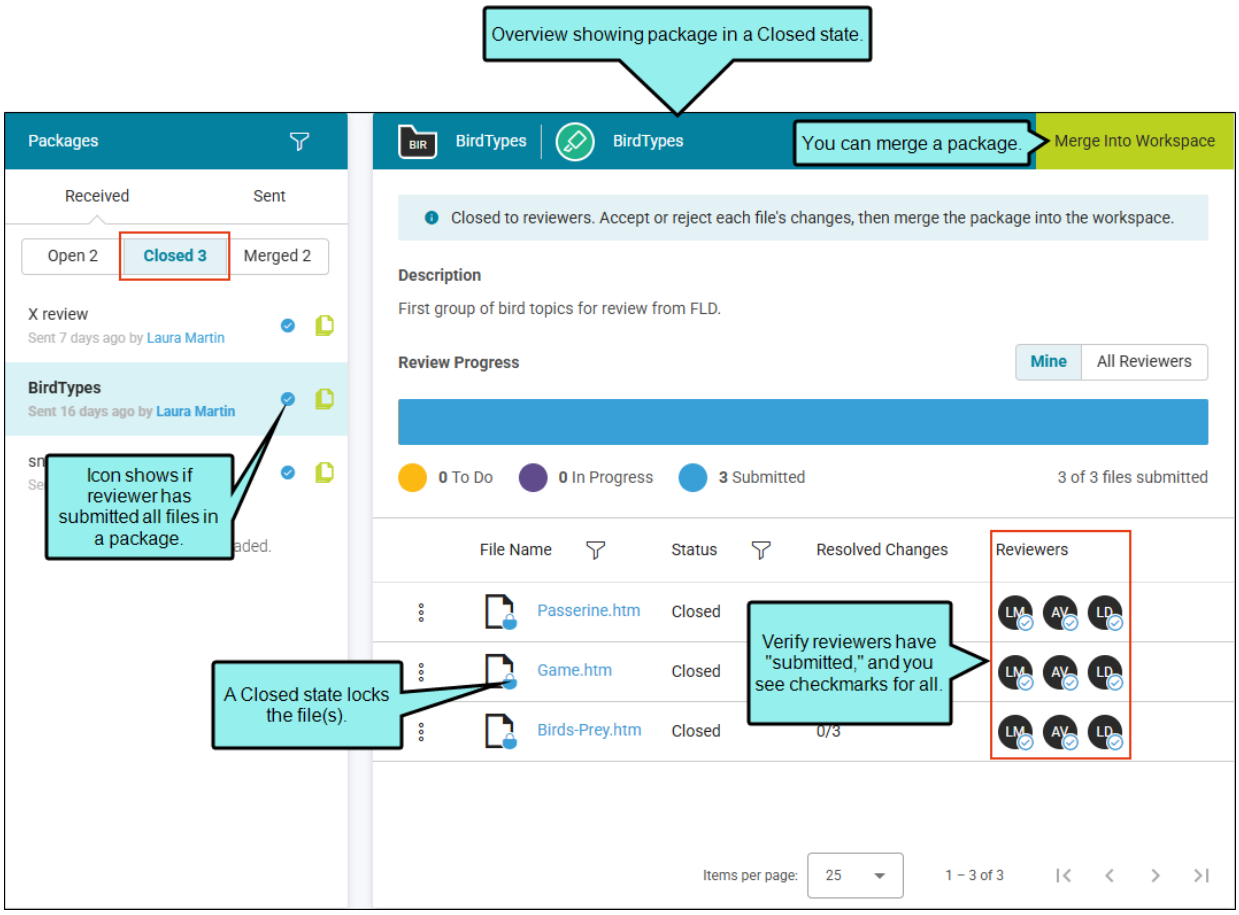
> **NOTE** Authors have access to data grids for monitoring and managing review packages in Flare Online. From the top navigation select **Grids**. From there you can view the Packages grid all review packages in Flare Online, or you can view a Files grid which shows all files sent for review regardless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

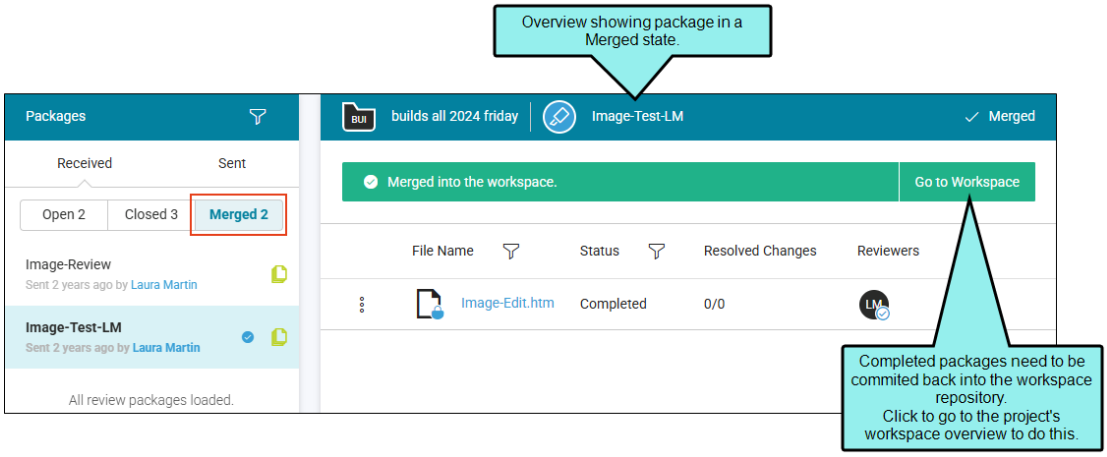
Review Packages Overview

When you select a review package, you can see details in its overview. You have the ability to update aspects of the review packages, such as open review file(s), set status, and monitor changes as well as reviewers. This offers valuable momentum to the review process.

1. On the left side of the interface, click **Reviews**.
2. From the Review Explorer, select a package. Keep in mind that you can select a package from the different package states available to you in the Review Explorer (i.e., Open, Closed, Merged). Each state displays different information. The overview opens to the right.




Overview showing package in a Closed state.
Packages
Received
Sent
Open 2
Closed 3
Merged 2
X review
Sent 7 days ago by Laura Martin
BirdTypes
Sent 16 days ago by Laura Martin
Icon shows if reviewer has submitted all files in a package.
BirdTypes
BirdTypes
You can merge a package.
Merge Into Workspace
Closed to reviewers. Accept or reject each file's changes, then merge the package into the workspace.
Description
First group of bird topics for review from FLD.
Review Progress
Mine
All Reviewers
0 To Do
0 In Progress
3 Submitted
3 of 3 files submitted
File Name
Status
Resolved Changes
Reviewers
Passerine.htm
Closed
Game.htm
Closed
Birds-Prey.htm
Closed
0/3
LM
AV
LD
Verify reviewers have "submitted," and you see checkmarks for all.
A Closed state locks the file(s).
Items per page:
25
1 – 3 of 3

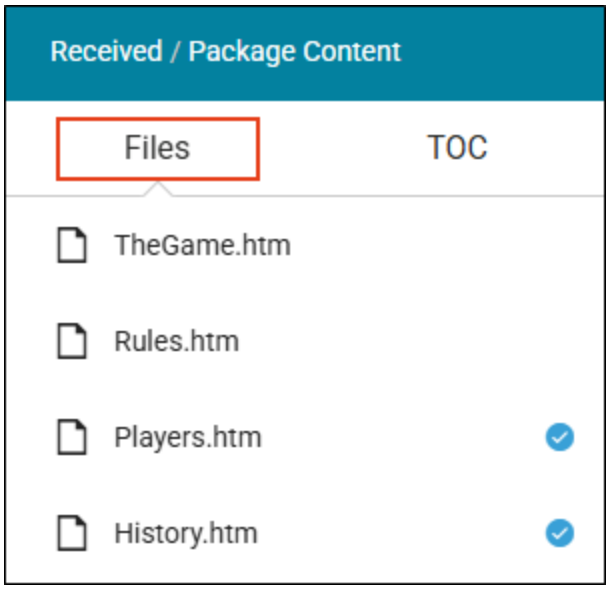


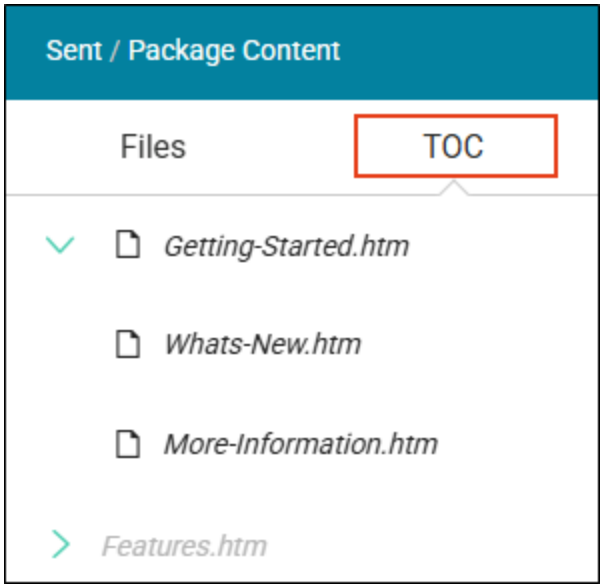
NOTE An author, who is also the owner of a review, can modify anything about a package or the files within it even if they do not have the Manage Review permission.

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 top navigation, click **Reviews**.
3. From **Packages > Received**, locate the desired package, and select **Show files** .
4. The pane changes to show the contents of the package. Select **Files** or **TOC** at the top for your preferred view.





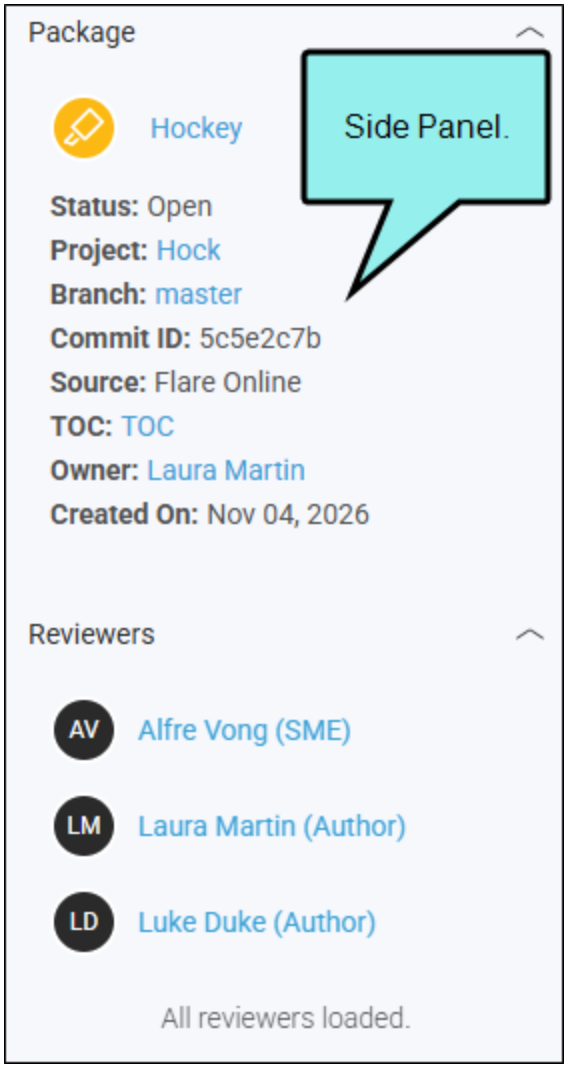
NOTE Notice in the TOC structure, that if files are not included in the review package they appear dimmed.

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

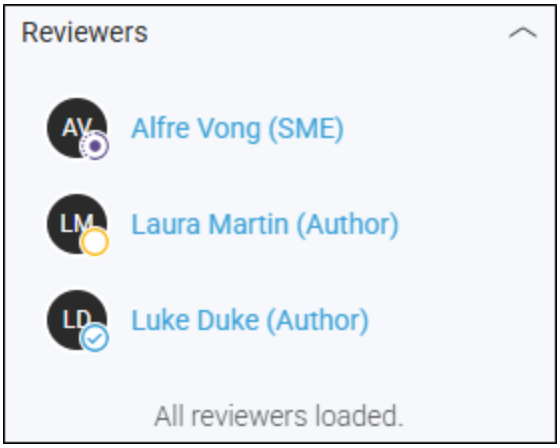
5. Select a file. It displays in the right side for reviewing and editing.

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 while editing.



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.

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

Review Package Status

- Open The review package is open for review and reviewers can make edits. This is the default setting.
- Closed This stops reviewers from editing. All files in the package are set to a closed status (i.e., the package is no longer available for review).
- Merged All the changes are merged and sent to the workspace. To interact with the merged review package files you must go to the project's workspace overview page.

Review File Status

- Open The file from the package is open for review. This is the default setting.
- Closed The file from the package is closed for review.
- Completed The file from the package is merged into the workspace.

Reviewer Status

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

Review Workflow

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

1. Owner 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 Open the Reviews page, and click  to create a new package. The wizard is where the owner selects files for review, a TOC, and reviewers. Reviewers of different seat types (e.g., authors, SMEs) can be chosen, and anyone selected is automatically associated with the project, and is an assigned reviewer for all the files chosen.
4. Reviewer Open the Reviews page. From the Reviews > Packages tab, all reviewers can see assigned packages in the Received pane.

   Click to expand the Open tab (if necessary), and select a package received. The Review Packages Overview displays each file associated with the received package.

   Click each file to edit or annotate it using the Review Editor.
5. Owner During a review (before the reviewers submit files when done editing), owners can open the file and accept or reject changes to the content on-the-fly. If an edit is accepted or rejected, then all reviewers who have the file open can see the update from the owner.

   On the right-side of the editor, view pending changes and select Reject All, Accept All, or select the noted changes individually (X to reject it, check to accept it).
6. Reviewer When done making edits, click Submit. Use the overview to track submitted files.

   The reviewer is done submitting once all the files in the queue are complete. Notice the submitted icon next the package and the files remain in an Open state until the owner closes them. While in an Open state, files can be reopened for more edits, but the reviewer must select Submit again when done.
7. Owner After reviewed files are individually submitted from reviewers, owners must accept or reject changes (if not done already), and start to complete the review (i.e., close and merge the review package).

In each file on the right-side of the editor, view any pending changes. Be sure to account for all the changes by either accepting or rejecting the edits.

8. Owner From the upper-right corner of the overview, click **Close**. This closes all the files in a review package, puts an editing "lock" on them, and moves the package to **Closed**.

   (Alternatively, from the Review Package profile, select **Settings > Status > Closed**. This closes all files in the package. Or, from the Review Package Overview, click the vertical 3-dot menu and select **Closed**. This closes a single file in the package.)

   > NOTE To close and merge packages, be aware that if you are the owner of a review only, use the Sent pane. But if you are the owner and are also a reviewer, you can use the Sent pane or the Received pane.

   > NOTE If a reviewer clicks a closed review package file, it opens in the editor as read-only. A banner warning displays at the bottom of the editor indicating that the file is no longer available for review.

   > 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 After the review is finished and closed for editing, the review package needs to be merged into the workspace. From the Closed tab, select the review package. From the upper-right corner of the overview, click **Merge Into Workspace**.

   At this point, the owner is alerted to any unresolved changes, a merge point is created in the revision history, and the files will be in editing mode (meaning the files are not committed back into the repository with the merge action).

10. Owner The review files are merged into the workspace, but they still need to be committed back into the project's repository.

    a. From the top of the overview, click **Workspace Overview** from the text "Go to the project's Workspace Overview to commit the merged files to the repository." This opens the overview to the uncommitted files.

    b. In the Workspace Overview, select the file(s) in the list.

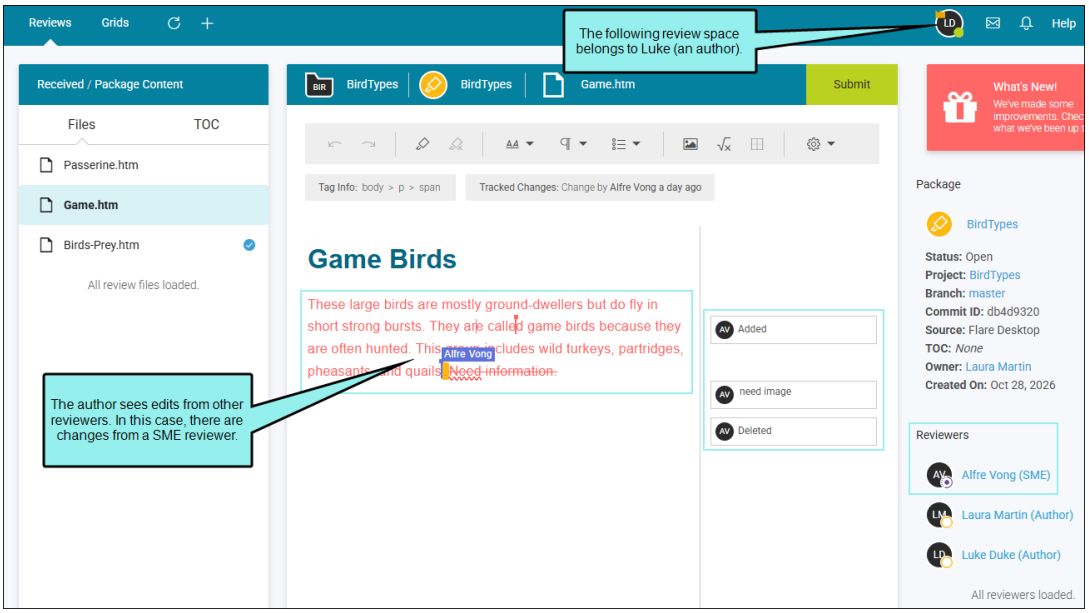
    c. Click **Commit** in the upper-right corner.

d. In the Create New Commit dialog, enter a **Commit Message** and click **Commit**. Alternatively, you can click **Cancel**.

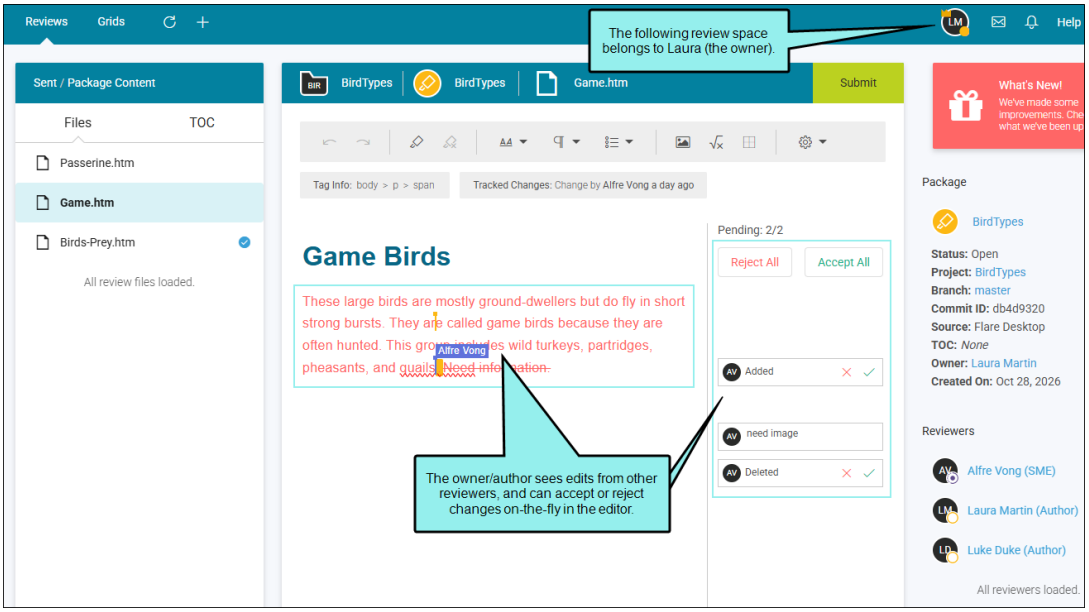
What's Noteworthy?

NOTE As reviews go through the process, you can trigger notifications such as review completed, created, document failed, closed, merged, or submitted.

EXAMPLE Since the editor is collaborative, if multiple reviewers are engaging the same file, all reviewers see changes in real-time.



The owner sees changes from other reviewers but can also take action to resolve those changes in real-time.



CHAPTER 3

Main Activities for Reviews

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

This chapter discusses the following:

Creating Review Packages 28
Opening Reviews 30
Editing Review Files 35
Tracking Review Edits 74
Closing Review Package 77
Merging Review Package 79

Creating Review Packages

Owners (or authors) can create review packages and send them to reviewers using Flare Online.

Before creating a review package, the owner needs to ensure the following:

- A project exists with topics in it to review.
- Invite the reviewer(s) to Flare Online.

Permission Required?

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



How to Create a Review Package in Flare Online

Owners can initiate the review process in Flare Online.

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click  (Create Review Package). The wizard opens.

   Alternatively, select **Grids > Packages**, and from the upper-right corner, click **Create Review Package**.
3. 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).
4. Expand the content folders to select files (e.g., topics, snippets) for the package. You can also select a folder to choose everything under it. Click **Next**.
5. (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**.
6. (Optional) Select reviewers. Click **Next**.
7. 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.

Opening Reviews

Opening review packages is quite simple, but keep in mind 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. In the Review Explorer, under the **Packages > Received > Open** tab, and select the desired review package.

   If you are a reviewer and also the owner of the package, you can also open it under the **Packages > Sent** tab. You might do this if you want to continue editing the file after you have sent it to others for review.

   > 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 **Packages > Received > Open**, select a package. The overview displays the package details to the right.
    - If you are a reviewer who has already submitted a file, you can reopen the file until the owner closes the file for editing.
4. To select a file. Do one of the following:
    - From the Review Packages Overview, click a file. It opens in the Review Editor for you to look at and edit. (The left pane automatically switches to the Files view.)

    Or,

    a. From the selected review package in the Review Explorer, select **Show files** .

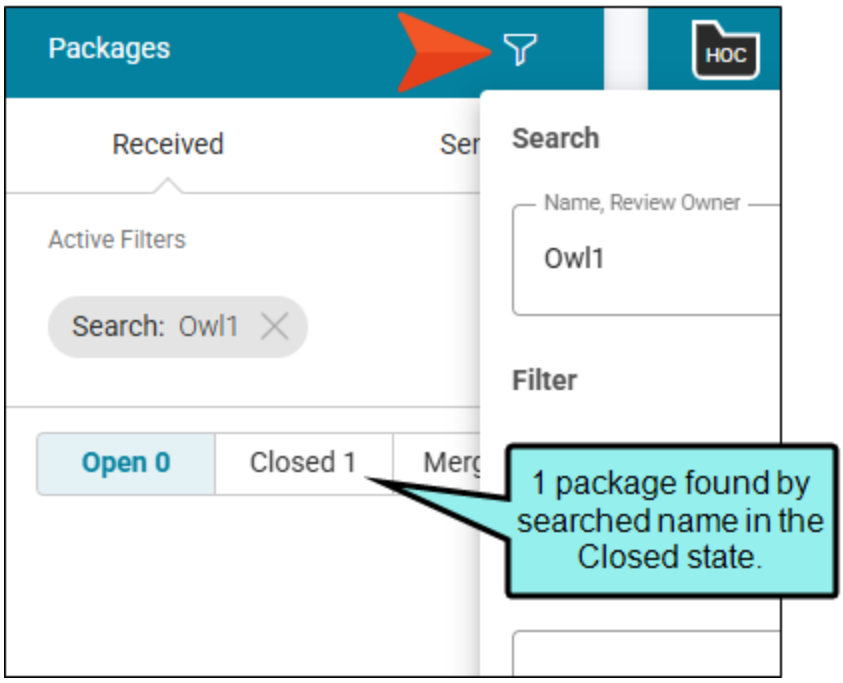
    b. Select **Files** or **TOC** at the top for your preferred view. If an owner chooses not to associate files with a TOC, then a TOC will not be applicable to your review package.

    c. Click a file. It opens in the Review Editor for you to look at and edit.

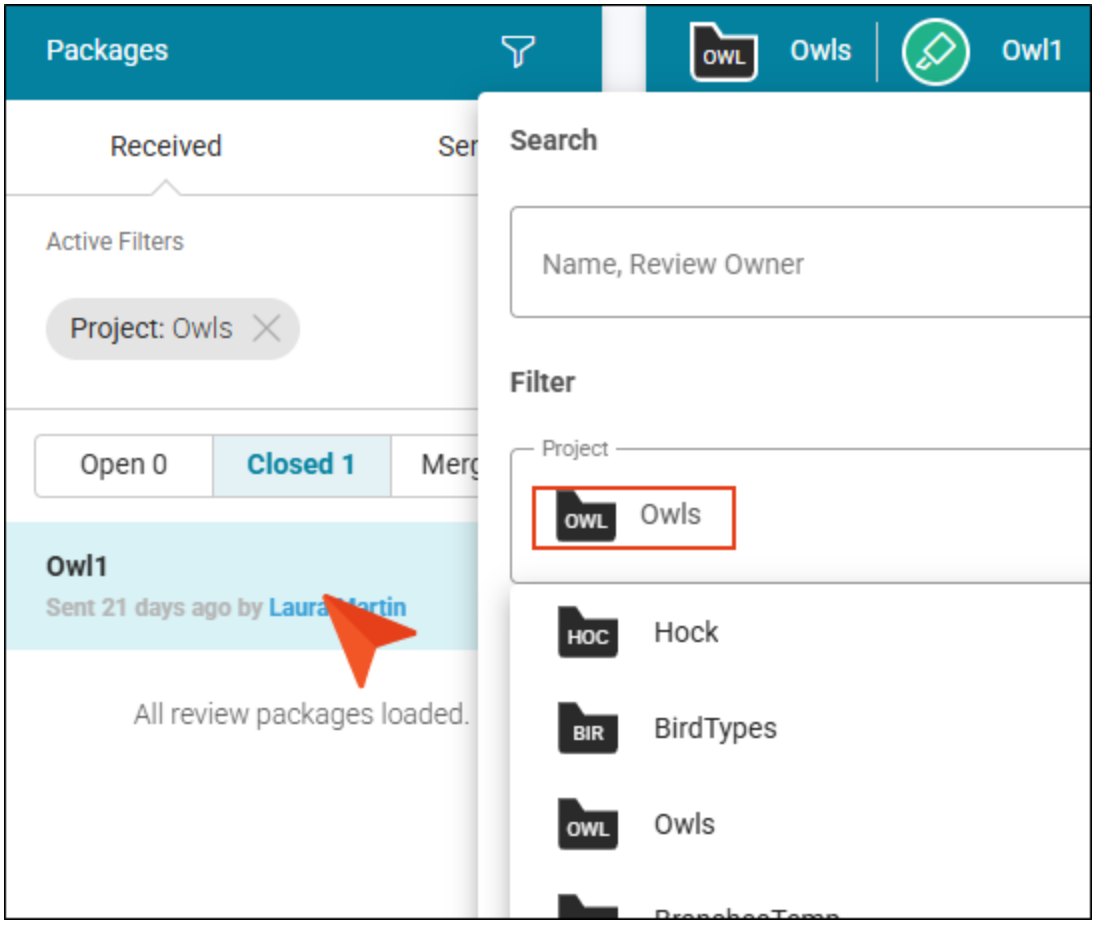
Filtering Review Packages

If you have many packages loaded, you can use a filter option search, filter, or sort packages. The filter includes all states and guides you to the package in its current state.

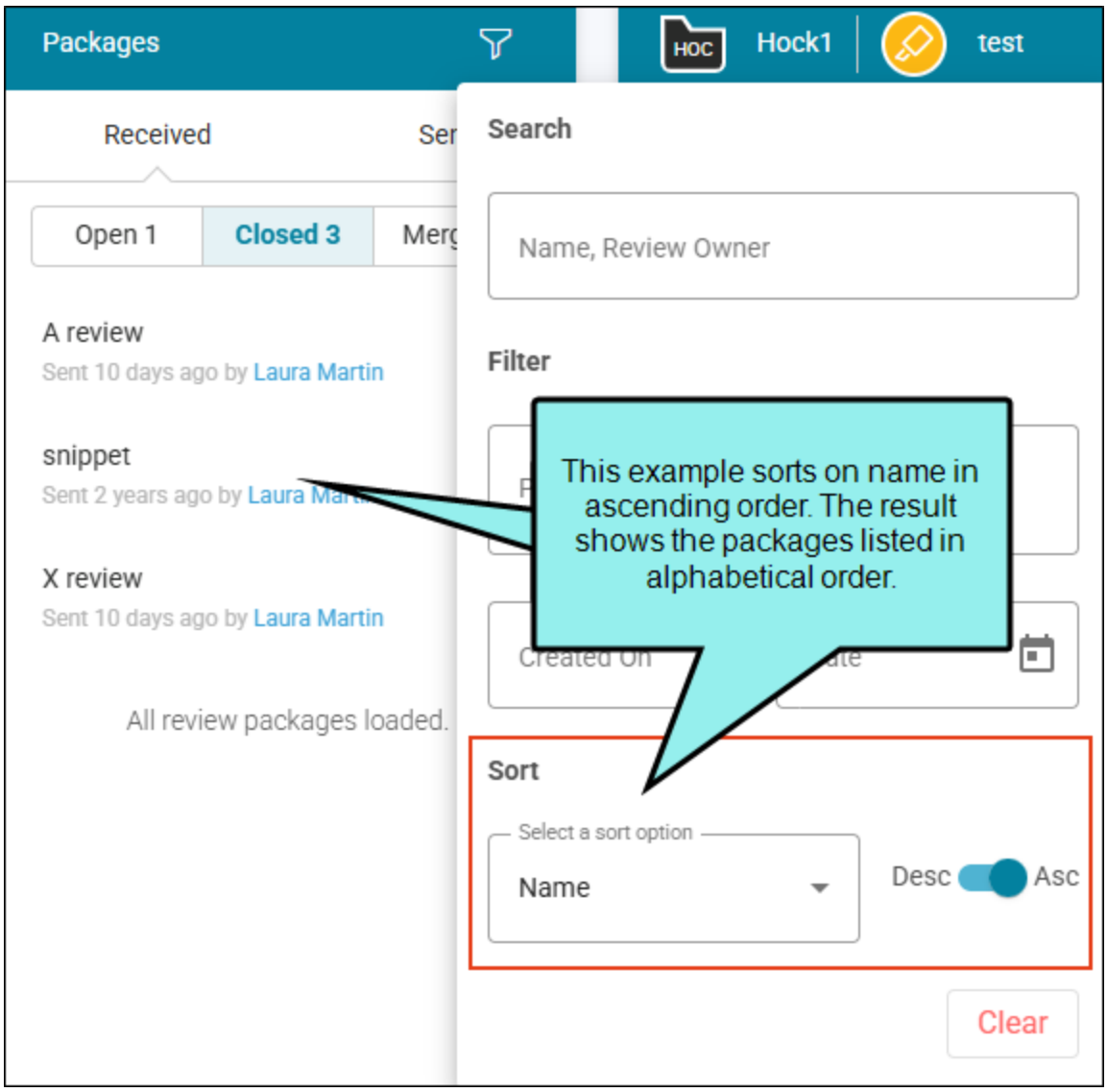
- Search Adjusts the pane to the left, displaying only the packages that contain a name, or review owner matching the search text. In addition, the active filter is added at the top; you can click the X to clear that filter.



- Filter Select specific projects to limit the results. The active filter at the top of the window pane adjusts automatically. You can also select a date related to the sent 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.


Packages
Owls
Owl1
Received
Ser
Active Filters
Project: Owls
Open 0
Closed 1
Merg
Owl1
Sent 21 days ago by Laura Martin
All review packages loaded.
Search
Name, Review Owner
Filter
Project
Owls
Hock
BirdTypes
Owls

- Sort 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.



In the Filter dialog, you can click the Clear button at the bottom to reset the fields. When you are finished setting options, just click off the dialog.

Editing Review Files

The crux of the review process is for the reviewer (i.e., an author or subject matter expert) to edit files sent from the owner of the review package. 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.

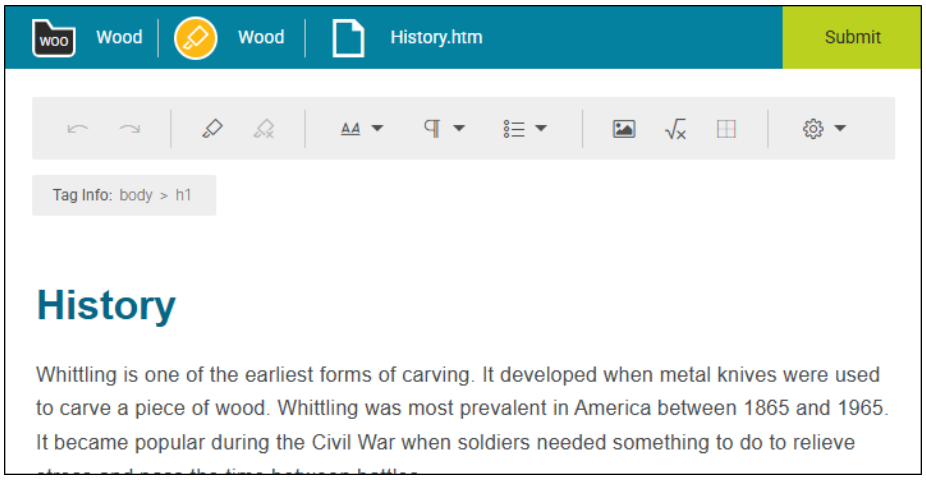
Since the editor is collaborative, multiple people can edit a file at the same time, so you can see other people's changes in real time. The owner has additional editing capabilities that involve accepting or rejecting the changes to a file.

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.

Review Editor

All reviewers associated with a review can view and interact with the Review Editor, but keep in mind that the user seat type can impact available editor functionality.



How to Edit a File

1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Reviews**.
3. In the Review Explorer, under the **Packages > Received > Open** tab, and select the desired review package.
4. From the Review Packages Overview, click a file. It opens in the Review Editor for you to look at and edit. (Alternatively, from the Review Explorer, select **Show files** .)
5. 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.
6. Select a file. It displays in the Review Editor to the right.
7. Start editing the file. For example, you can add or delete text, add lists, add images, add tables, bold text, create annotations, etc. As you edit, all changes are tracked and auto-saved as you work.
8. 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, a submitted icon displays by the file, and your status is updated with the appropriate indicator. Until the owner closes the file, you can reopen the submitted file and make more changes to it if necessary.

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

What’s Noteworthy?

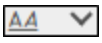
NOTE If as an owner, you want your changes to be included (along with other reviewers progress) in the analytics of the review, then you need to add yourself as a "reviewer" to the review package. The owner must submit the changes just like any other reviewer.

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, you can only edit the content. Also, notice that formatting from your stylesheet is rendered in this editor.

Review Editor Toolbar

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

Option	Description
	Reverses the most recent action.
	Repeats the most recent action that you reversed.
	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.
	Removes the selected annotation from the document.
	 Applies bold typeface to the content selected in the topic.  Applies italic typeface to the content selected in the topic.  Underlines the content selected in the topic.
	Lets you apply basic styles to block-level content: ■ **Paragraph** Applies a paragraph tag to the content. ■ **Heading 1 - Heading 6** Applies a heading tag (<h1> through <h6>) to the content.

Option	Description
	Lets you create and set list styles on 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.
	Displays a small rectangle with a keyboard icon, as well as a full mathematical browser keyboard at the bottom of the workspace. You can type directly in the rectangle or use the full keyboard to create equations. There is also a small icon in the rectangle to choose various equation options.
	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.
	 Shows or hides colored shading (and in some cases a colored square) where conditions have been applied.  Shows or hides styles rendered from the cascading stylesheet.

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.

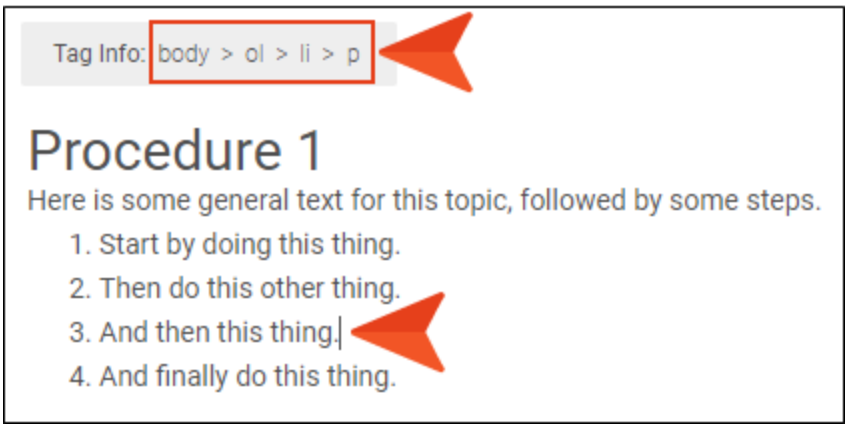
Display Details

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.

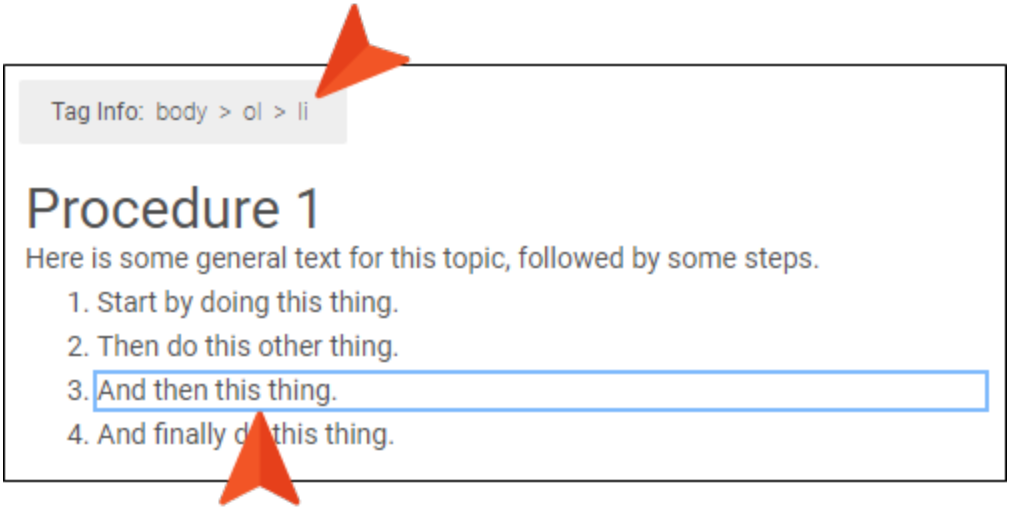
Clickable Tags

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

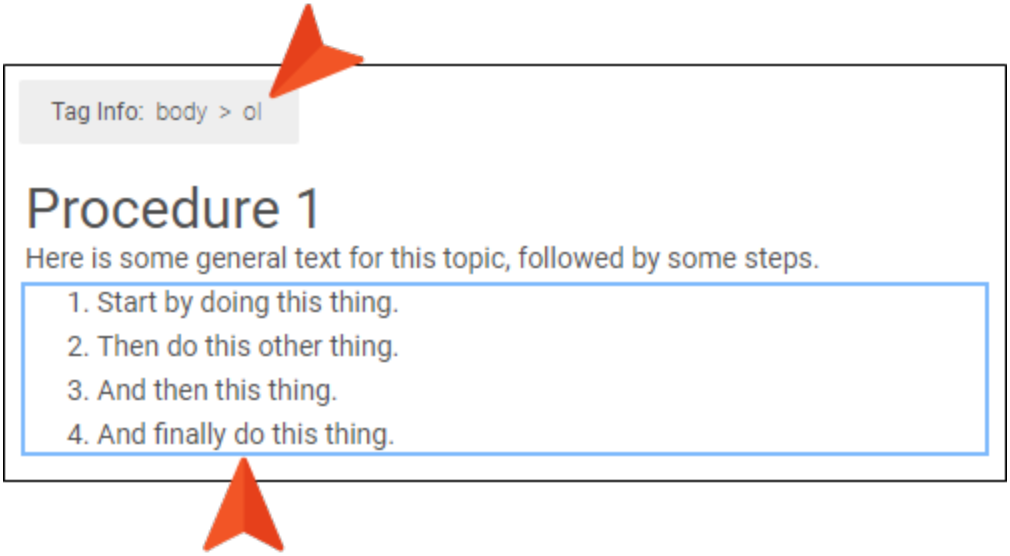
☆ EXAMPLE You have a topic with a numbered list, and the cursor is currently located within it, at the end of step 3. Notice that the info bar describes the tag structure. The broadest tag is <body>, which essentially holds all of the content in the file. This is followed by <ol> (which is an ordered,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



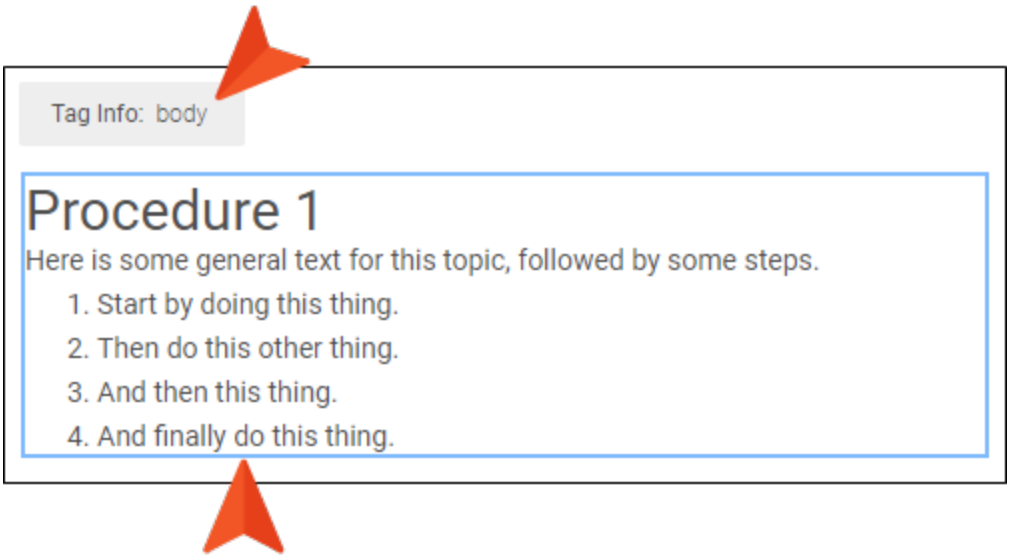
If you were to click li in the info bar, the list item would be selected. (Clicking the p tag would look much the same in the editor.)



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



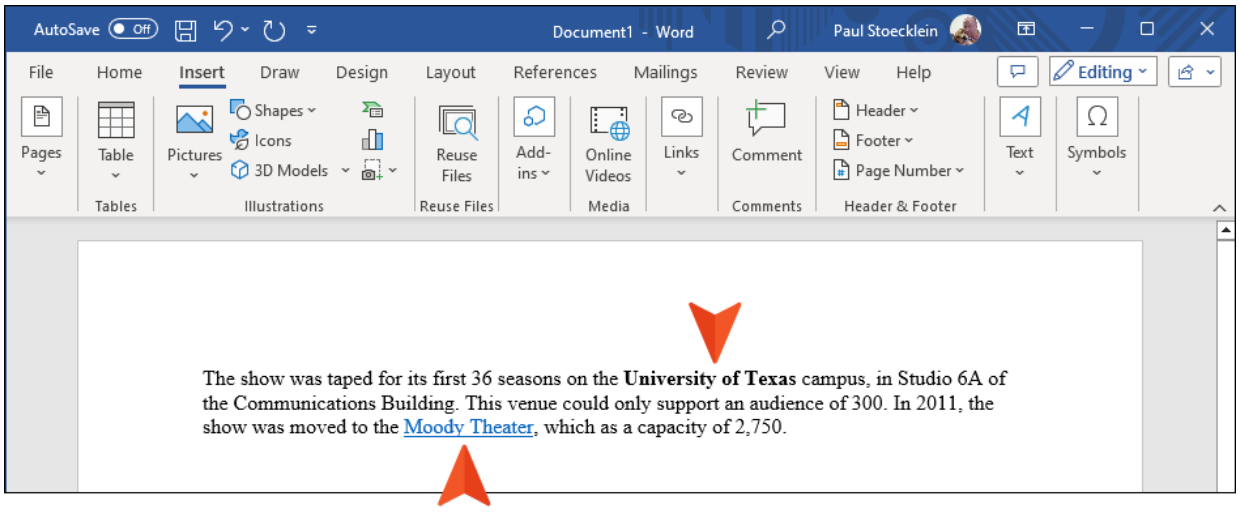
☆ And finally, if you click **body**, everything in the file would be selected.

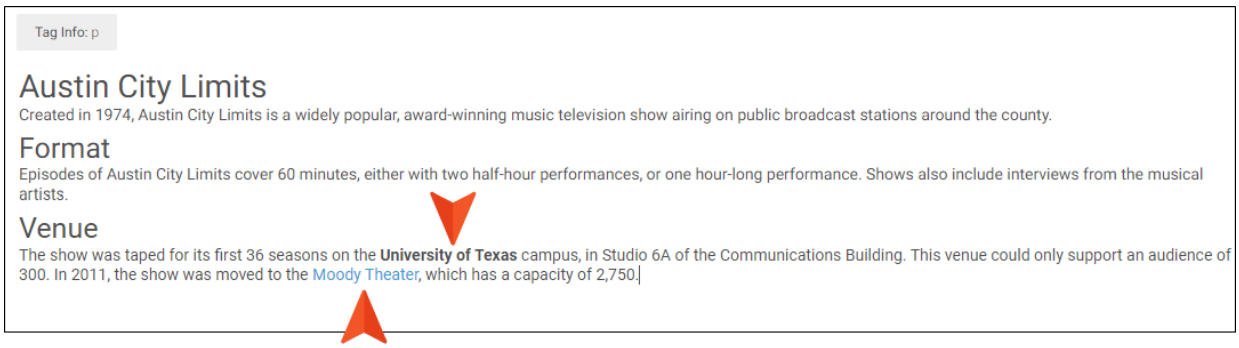


Copying and Pasting Content

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.

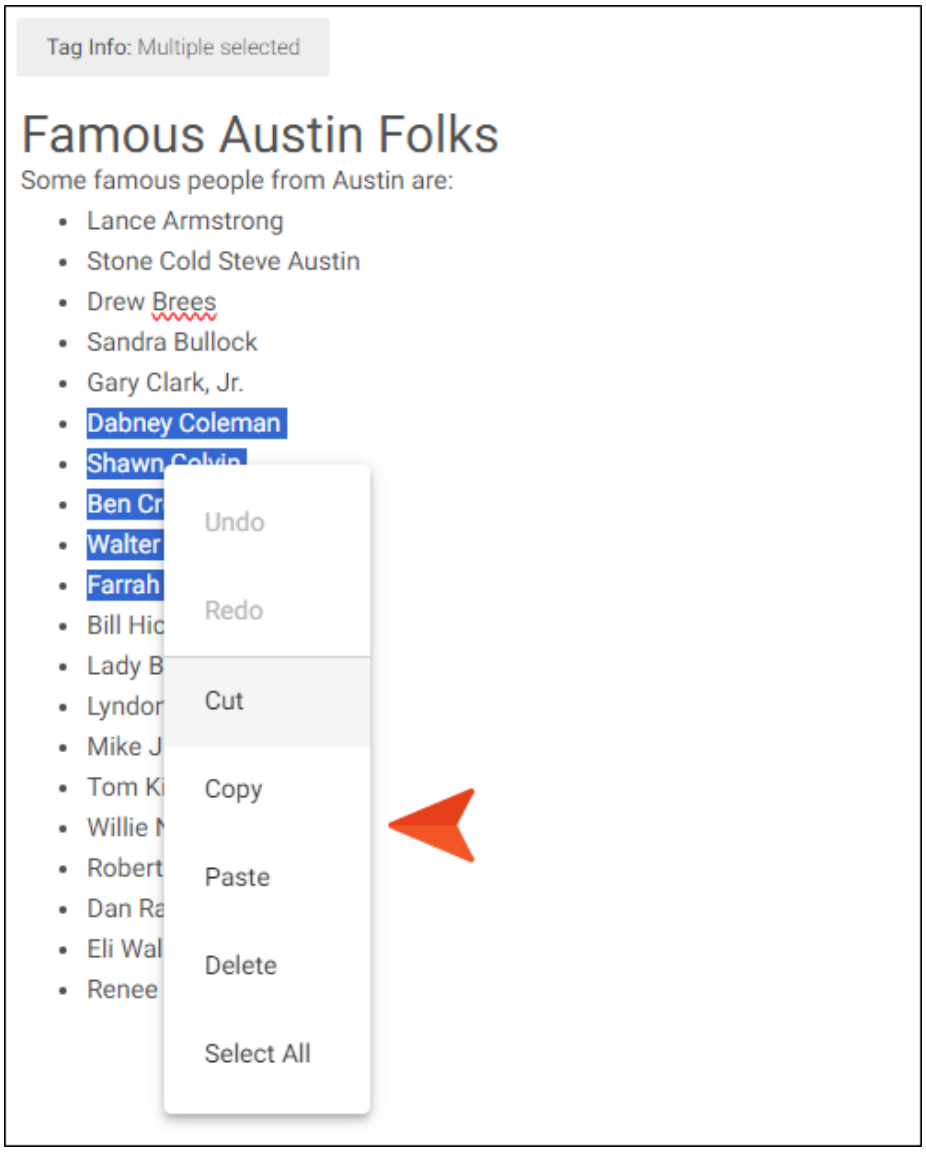




- **Tables** Formatting for tables is retained when copying and pasting within and between files in Flare Online. Pasting tables from other software (e.g., Word, Outlook) will be inserted as simple tables.
- **Images** You can also copy and paste images, but only when you are doing so within the same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

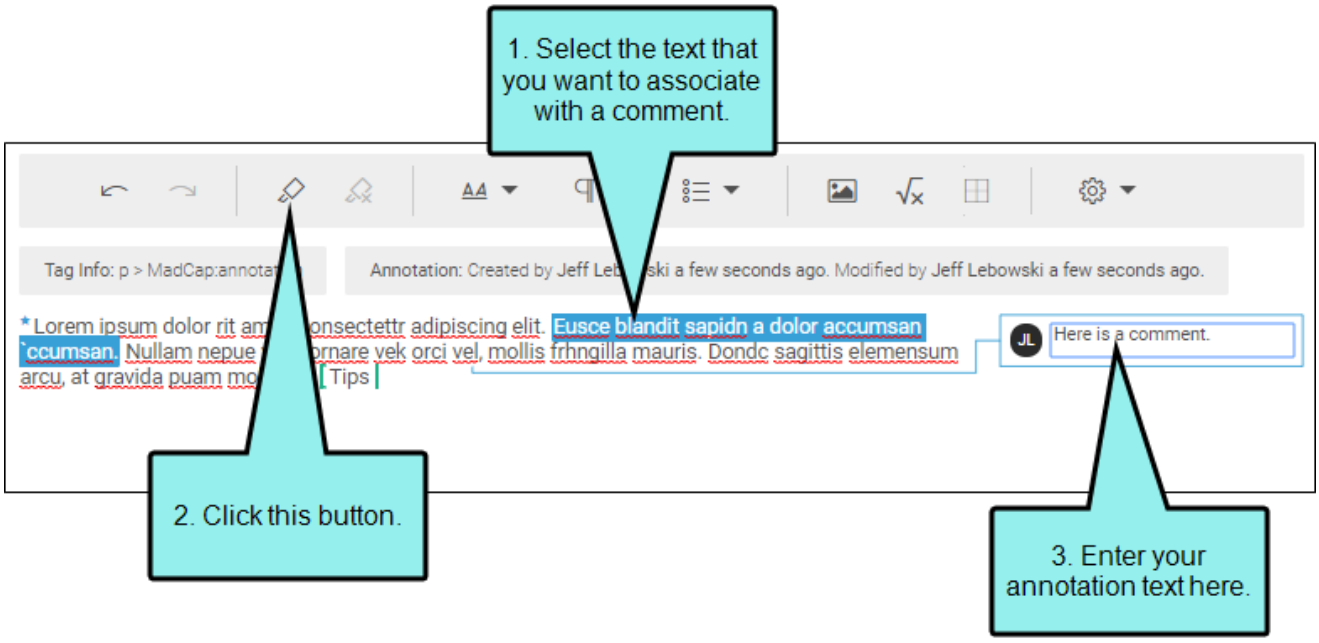
When copying and pasting (and performing other actions, such as cut, select all, and undo), you can use standard shortcuts (e.g., CTRL+C, CTRL+V) on your keyboard.

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



Annotations

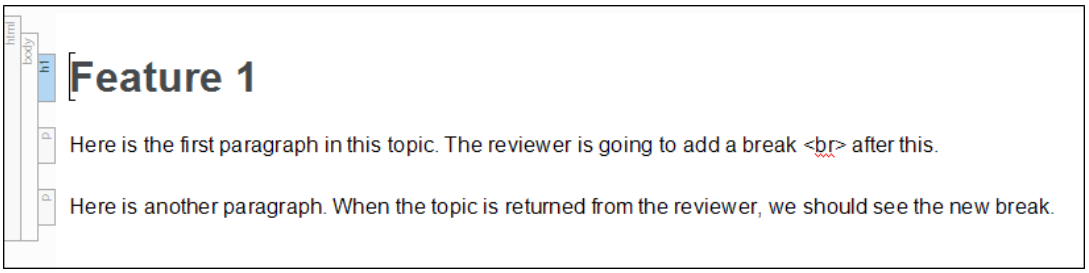
By selecting content in the editor and clicking in the toolbar, you can insert annotations (i.e., comments) regarding that content. Annotation text is placed in a rectangle in the sidebar to the right. If you click the annotation rectangle, a line points to the content associated with the inserted comment.



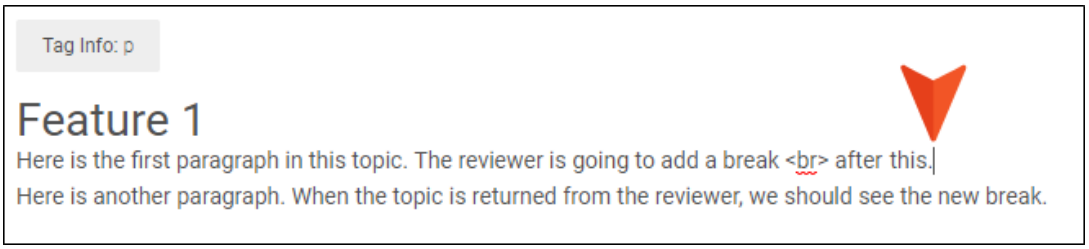
Breaks

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

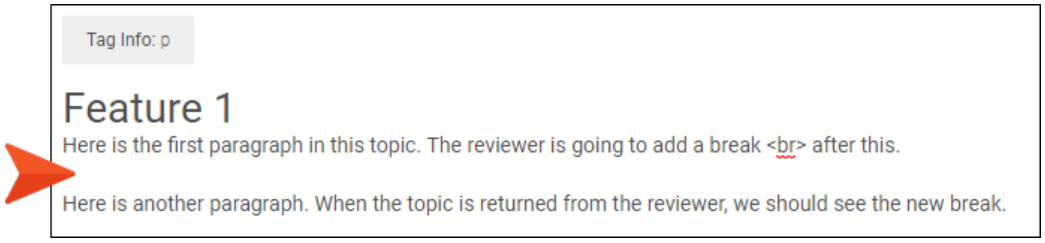
☆ EXAMPLE You have a topic in Flare Desktop that looks like the following, and you send it to someone for review in Flare Online.



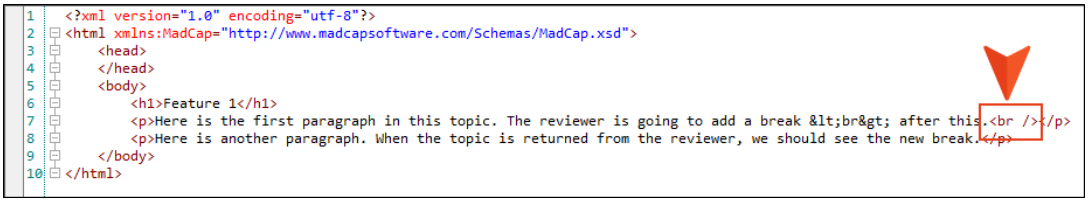
In Flare Online, the reviewer places the cursor at the end of the first paragraph.



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



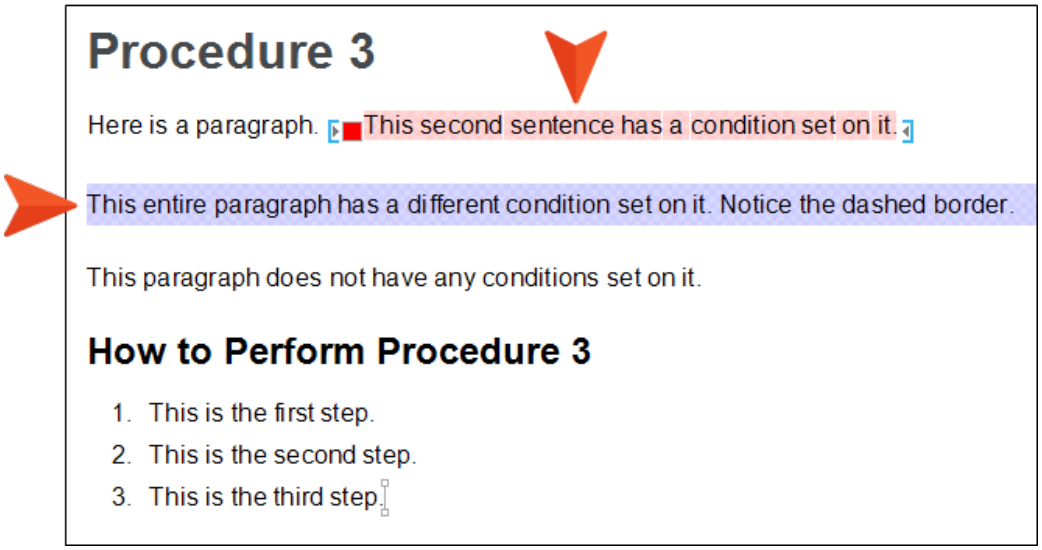
The reviewer submits the topic. After you accept the change and bring the topic back into the project, replacing the old version, you can see the tag when you view the topic in the Text Editor.



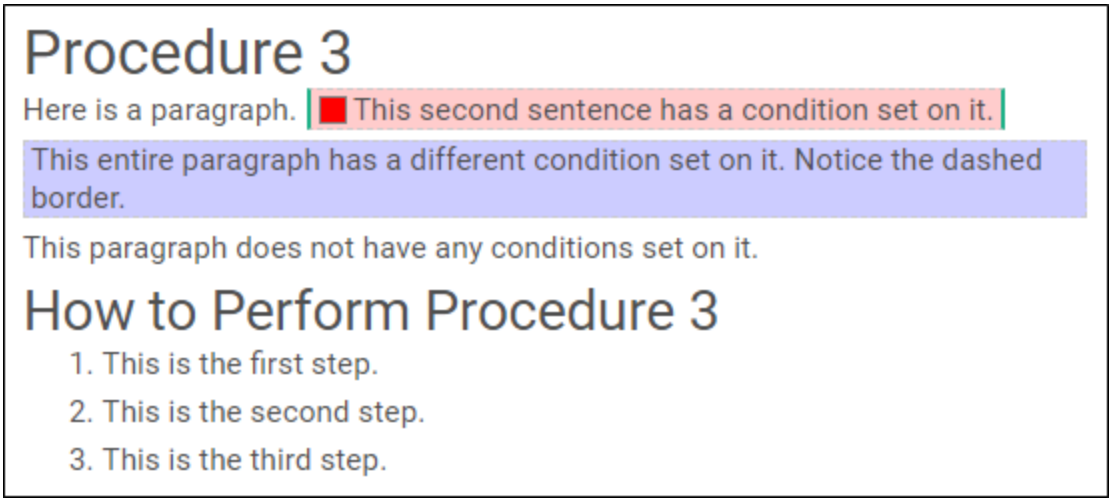
Conditions

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.

☆ 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.



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



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?

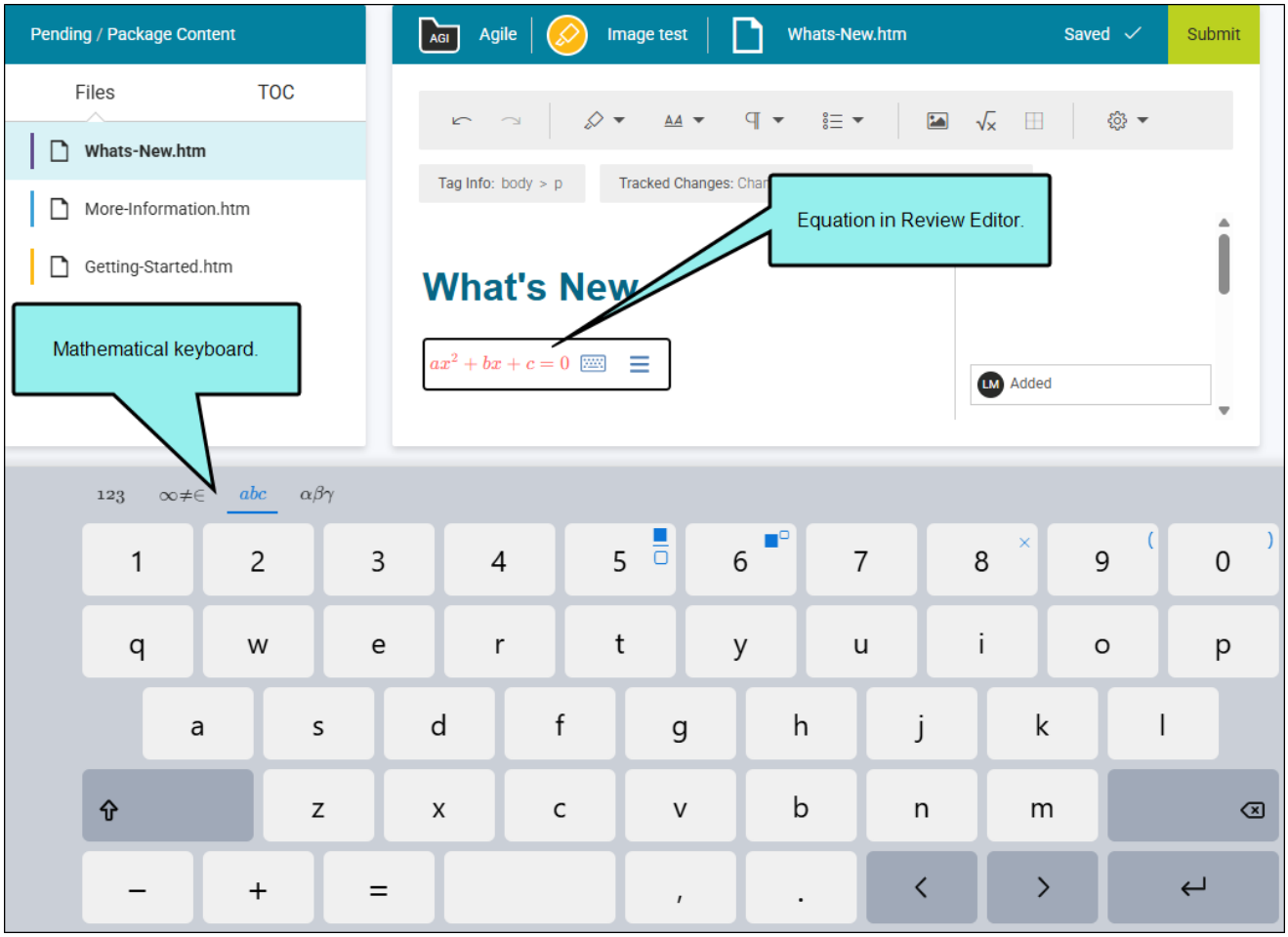
No special permission is required for this activity. All users who are associated with the review process for the specified file are allowed.

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.

Equations for Reviews

Flare Online's editor supports equations. This means that you can create, insert, and edit equations. Teams can author technical content efficiently with browser-based equation editing that keeps complex documentation accurate, consistent, and easy to maintain.

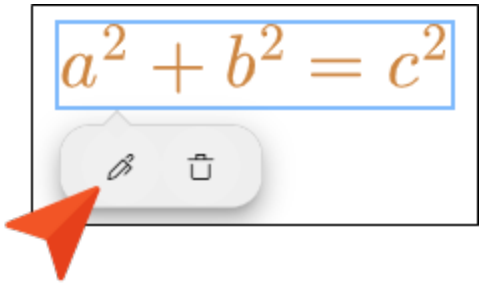


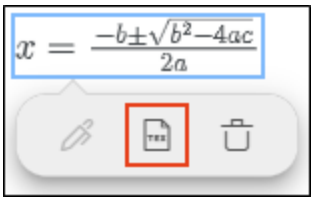
How to Create and Insert an Equation

1. In the editor, place your cursor where you want to insert the equation.
2. From the editor's local toolbar, select √x. (If your screen is a smaller size, select ⊞ and then √x.)
3. Use the rectangle and browser-based mathematical keyboard to create the equation. See "Equation Content Rectangle and Keyboard" on page 55.

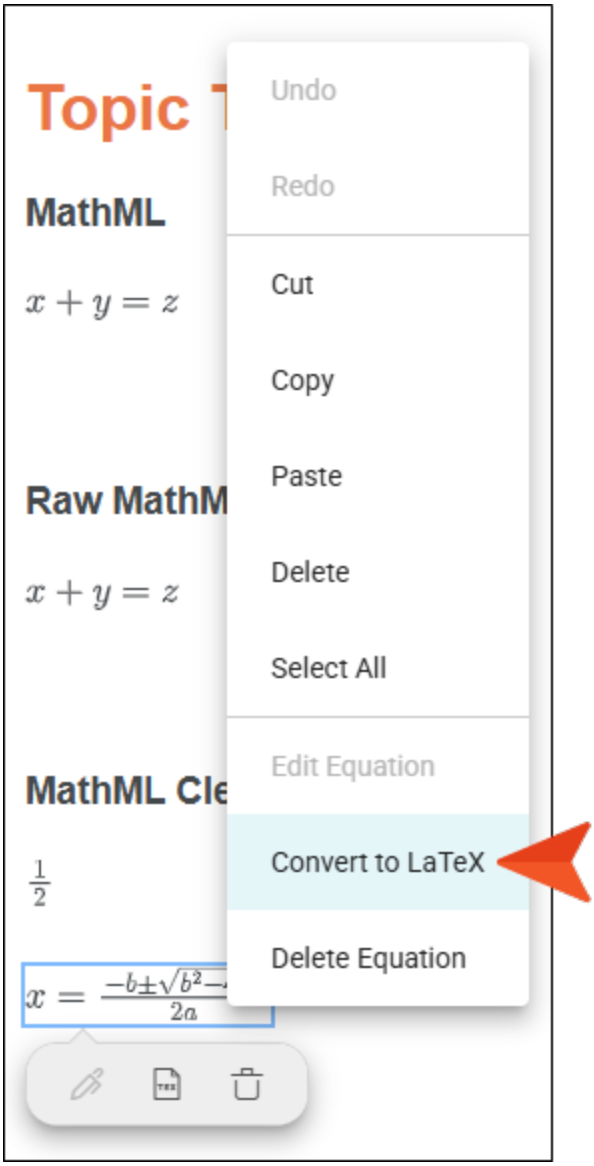
How to Edit an Equation

1. In the editor, click the equation that you want to edit. From the popup, click ✎. (You can also right-click the equation and from the menu select **Edit Equation**.)



> NOTE If an equation exists in a topic written in the MathML code-based format, you can convert it to the LaTeX format before editing. Click the equation and from the popup select **Convert to LaTeX**.
>
> 
>

Alternatively, you can right-click the equation and from the menu select **Convert to LaTeX**.

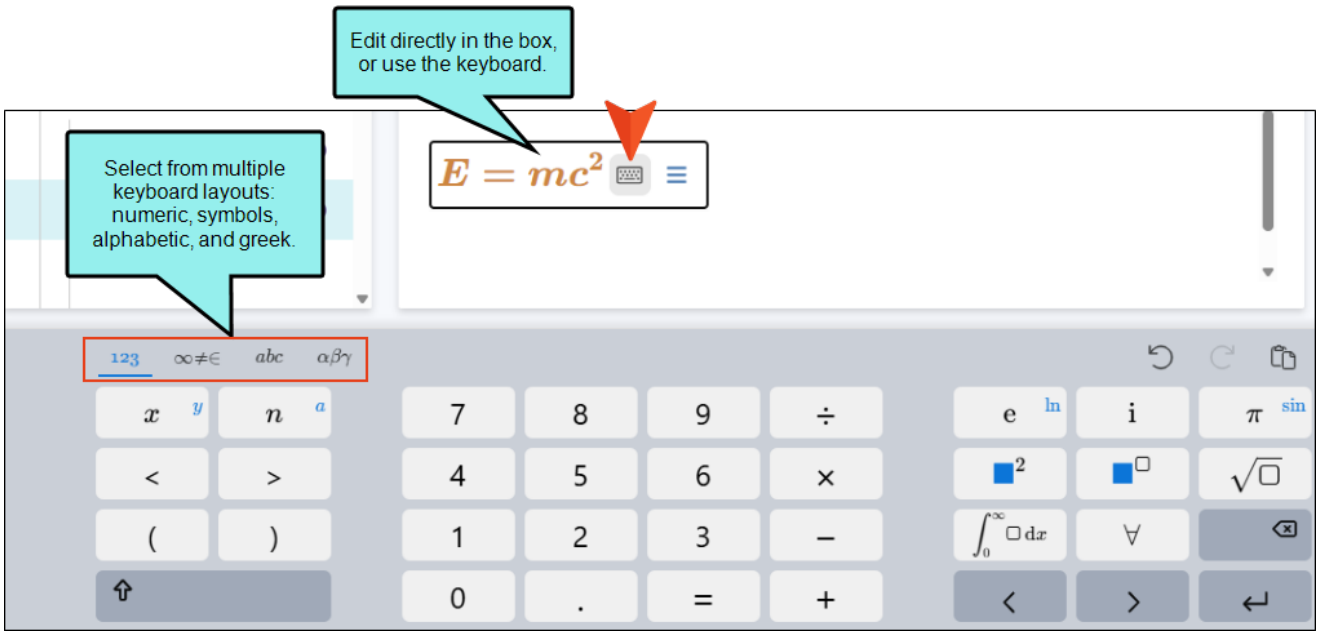


2. Use the rectangle and browser-based mathematical keyboard to create the equation. See "Equation Content Rectangle and Keyboard" below.

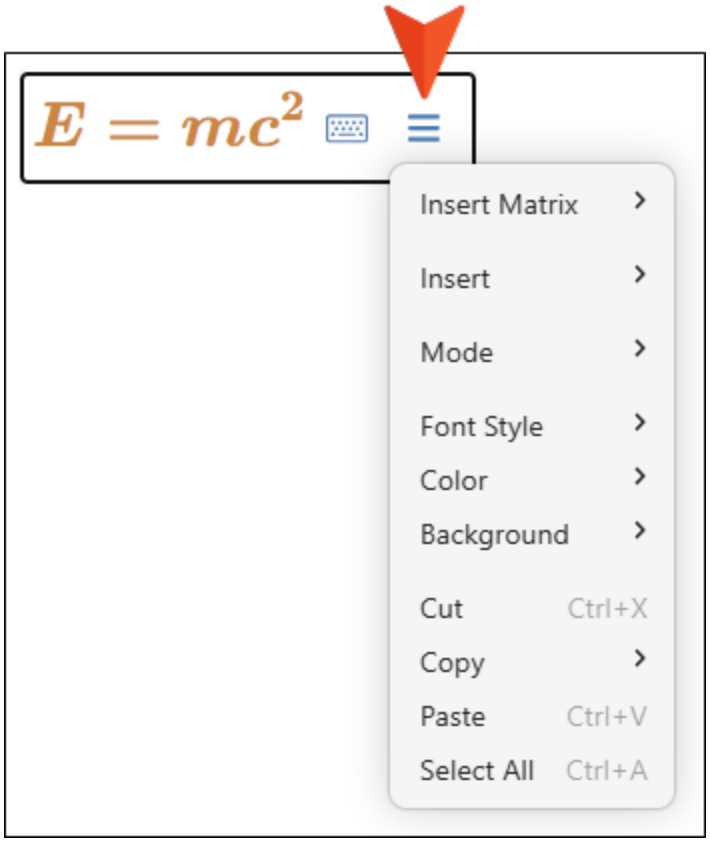
> NOTE Flare Online supports editing equations for the LaTeX and MathML format types. However, to edit the MathML equation, you need to convert it to the LaTeX format (which is easily done in the editor). Both types render in the output, and the format saved is determined automatically by where the equation originated from.

Equation Content Rectangle and Keyboard

When creating a new equation or editing an existing one, you can type directly in the rectangle that appears in the editor. You can also use the mathematical keyboard that displays at the bottom of the workspace. (Click the small keyboard toggle inside the rectangle to show or hide the keyboard at the bottom of the workspace.)



Once the rectangle becomes wide enough, you can click the menu icon to choose various options. Some are equation related, such as the insertion of a matrix, absolute value, derivative, or mode. Others are more basic content options, such as formatting, cut, copy, and paste.



NOTE The equation editor includes typing modes, Math, Text, and LaTeX, which are simply different ways of entering content into the editor.

How to Delete an Equation

In the editor, click the equation that you want to remove. From the popup, click . (You can also right-click the equation and from the menu select **Delete Equation**.)

Images for Reviews

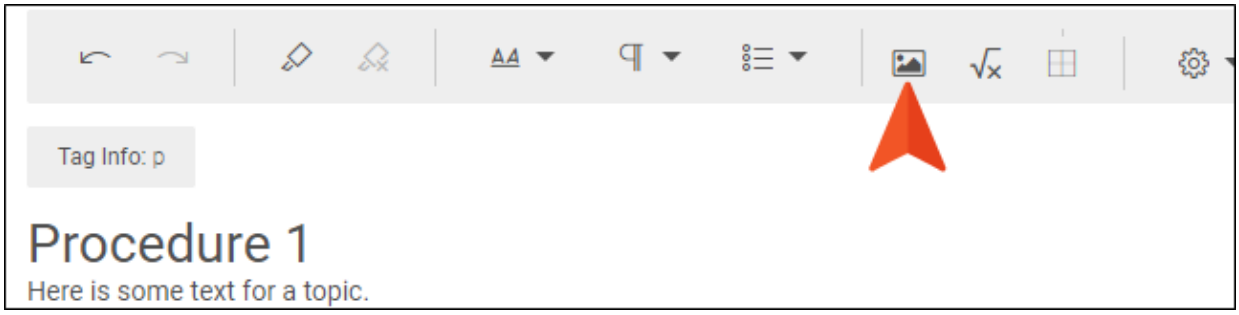
You can insert, edit, and move images in Flare Online's Review Editor.

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

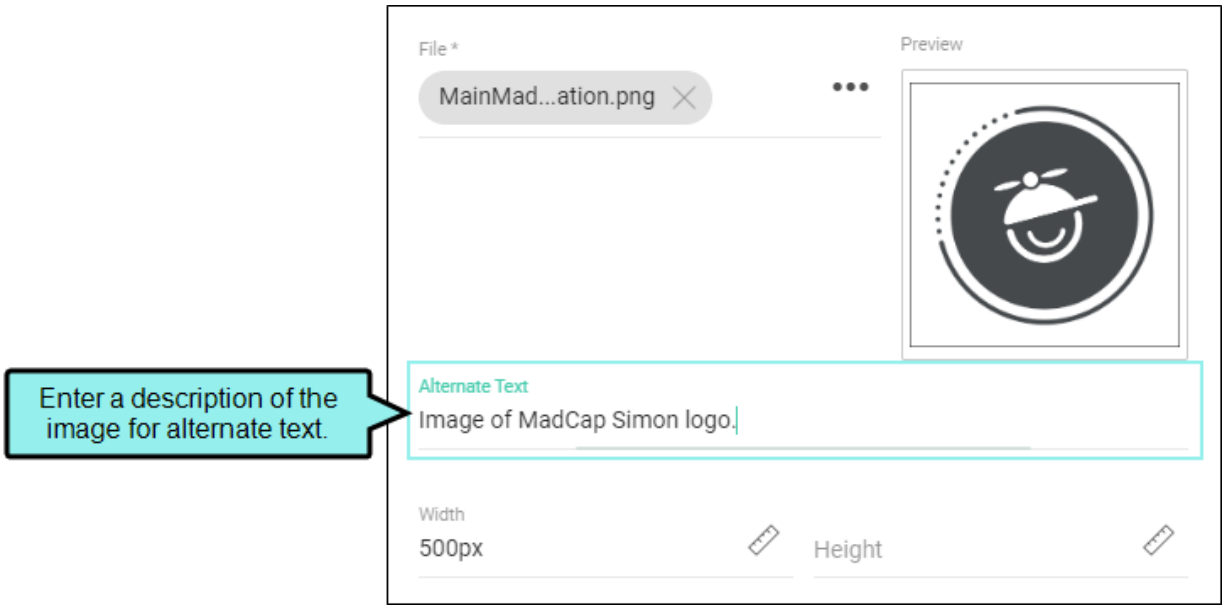
Once an image is in a file, you can edit the image properties.

How to Edit Image Properties

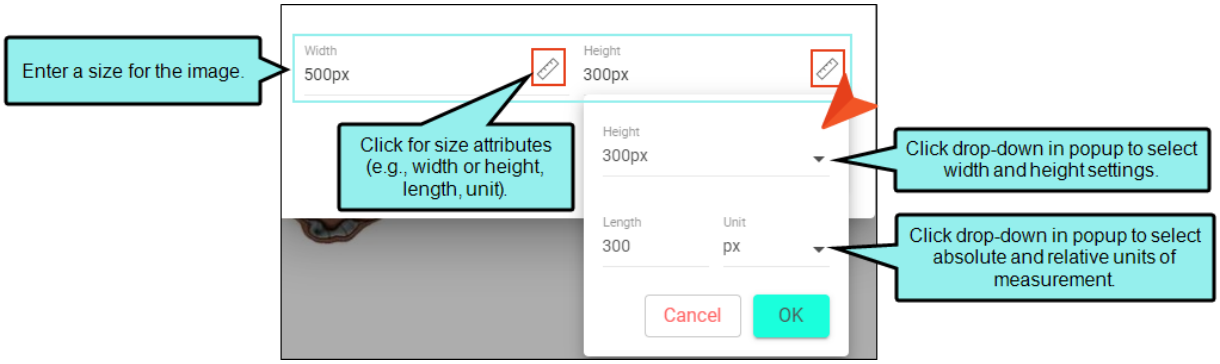
1. With the topic or snippet open in the Review Editor, select an image you want to edit.
2. In the local toolbar of the Review Editor, click .
3. Since you are reviewing, you can only upload a new file from your local system. In the dialog, select the **File** three-dot menu for the Open dialog, then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



4. (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.

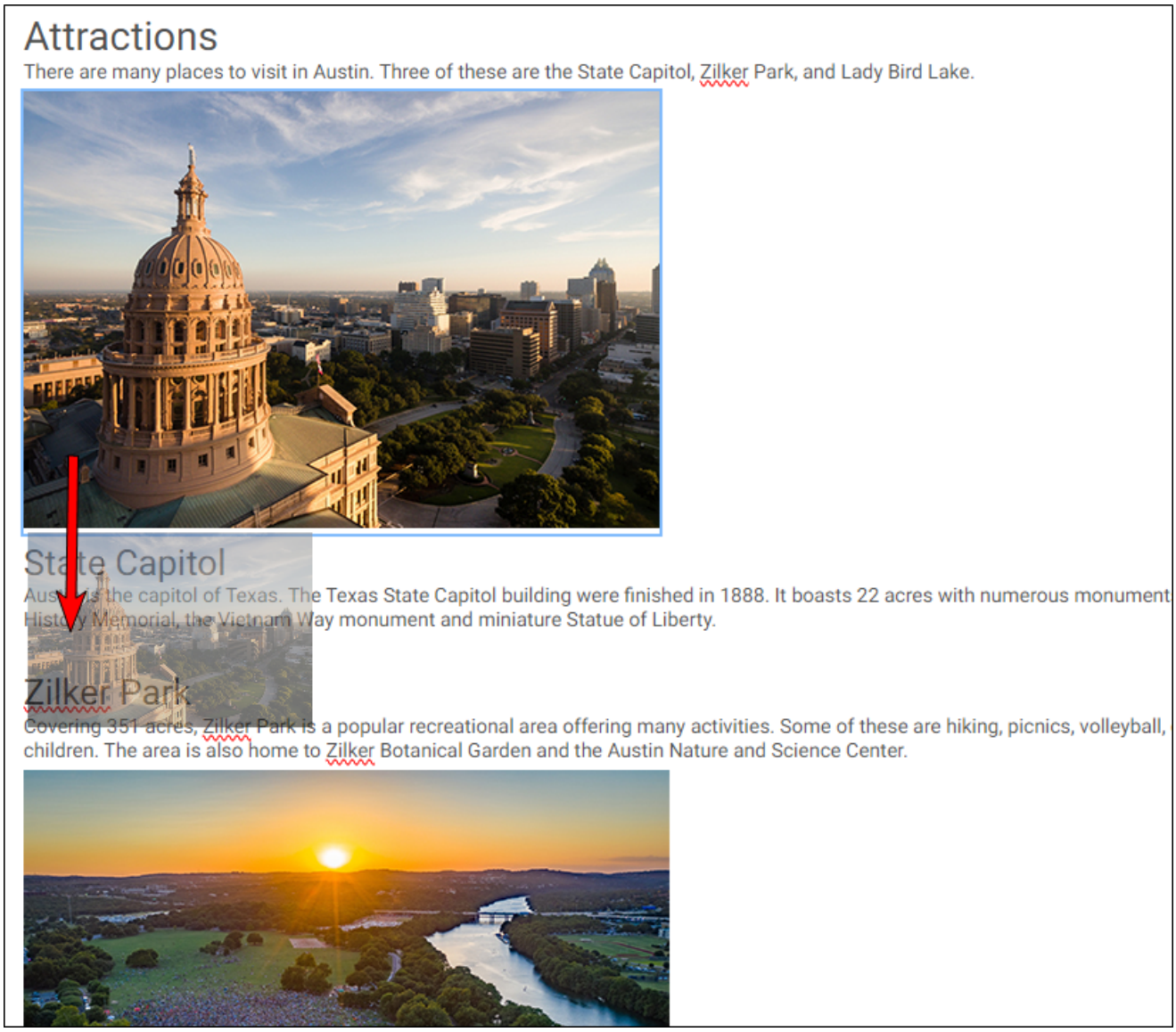
NOTE When resizing objects, you can ensure the aspect ratio is maintained. For example, if you want certain objects to be resized so that each is exactly 3 inches high, you can make sure the width of each object is adjusted accordingly to stay in proportion. To do this, first set the height at 3 inches. 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.



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

Attractions

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

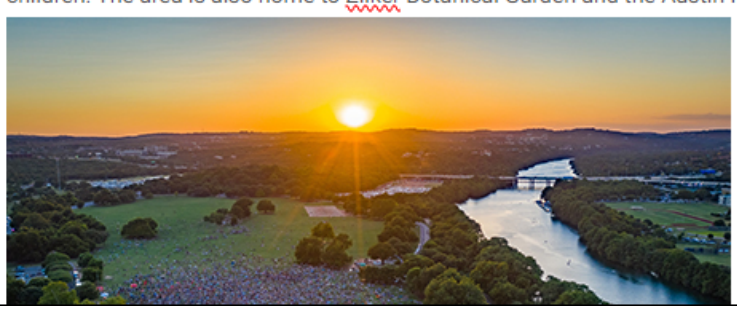
State Capitol

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.



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.

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 editor, select the **Lists** drop-down, and click  (for a bullet list) or  (for an ordered 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 . If you are on an indented list and want to go back to the outer level, click .
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

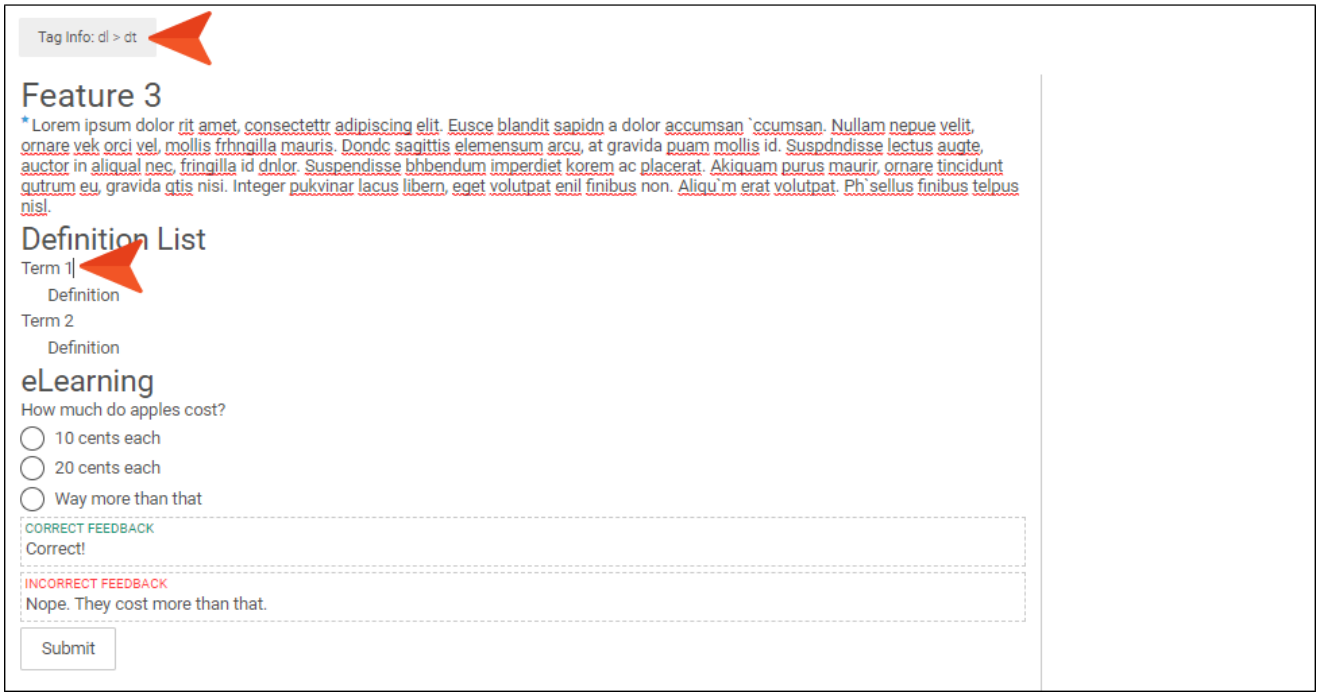
If an author sends a topic or snippet for review that includes a definition list, it displays in the Review Editor and can be edited. In addition, a reviewer can use a button in the Review Editor toolbar to create a new definition list. For more details about definition lists, see the Flare Desktop Help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

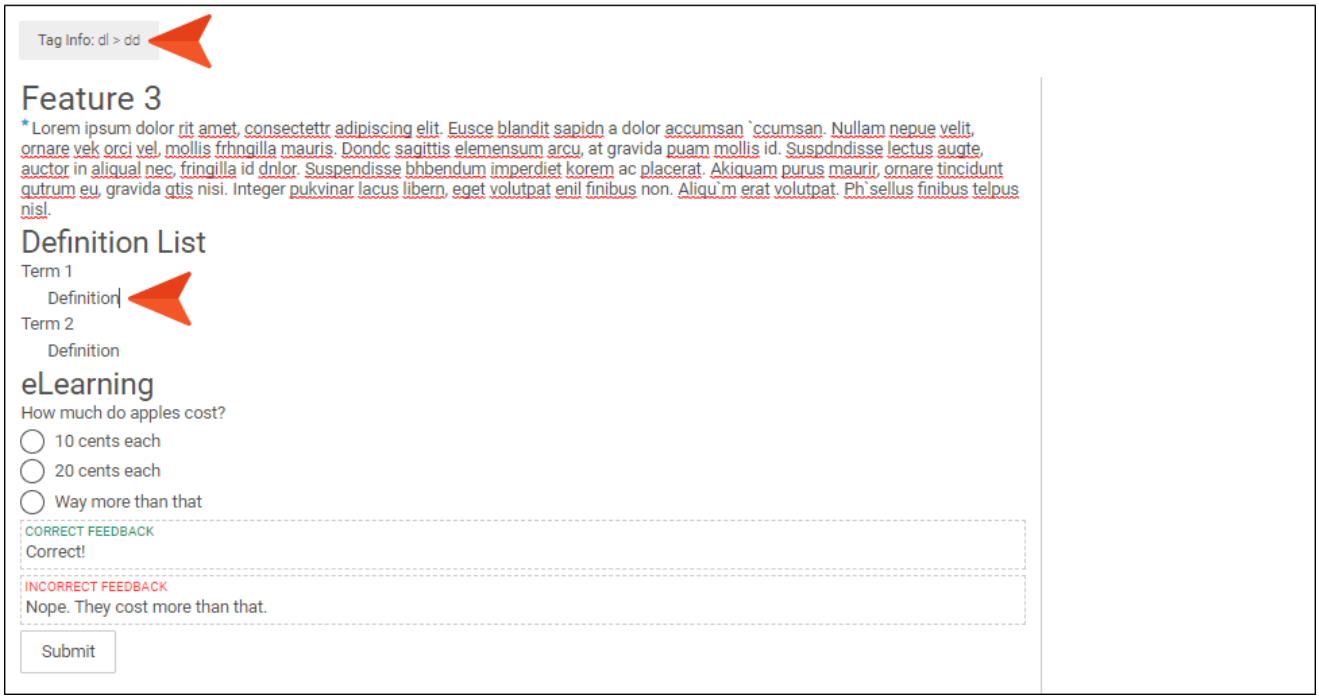
Definition List Tags

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.





How to Add a New Definition List

1. In the local toolbar of the Review Editor, select the **Lists** drop-down and 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

Styles render well in the editor. However, some tags and markup represented by markers are necessary for topics and snippets. These provide a visual cue that more than plain text is present. In some cases, the reviewer will not need to or be allowed to update the element. It is important to know that one of these elements is present, so it does not get deleted accidentally.

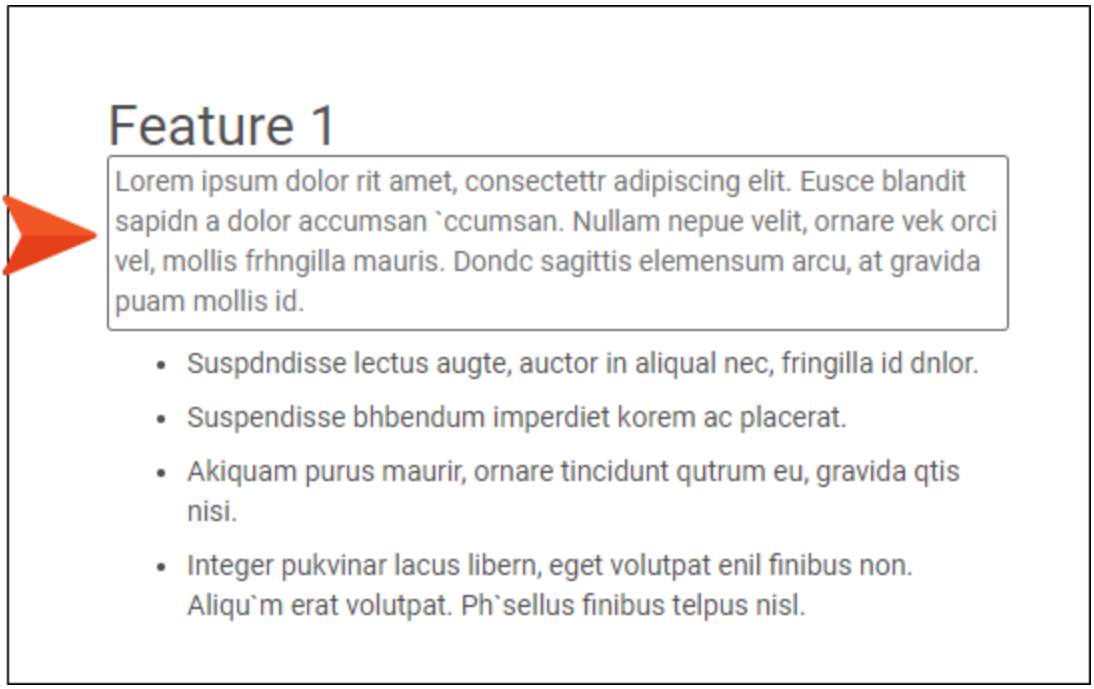
Marker	Elements
Banner 	Bookmarks
Dashed Border 	Conditions
Dotted Border 	Micro Content
Gray Box  Code not rendered will most likely display in gray boxes.	3D Models Concept Links Concepts Index Keywords Keyword Links
	Multimedia Page Breaks Proxies Related Topic Links Scripts

Marker	Elements
Solid Border 	Snippets Variables Page Footer Page Header

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.

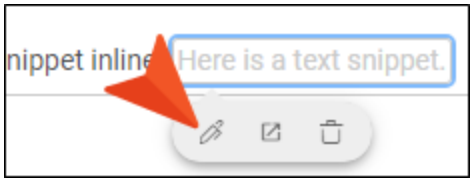
A border displays around an inserted snippet (in most browsers), and it is read-only until you open it separately to edit it.



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

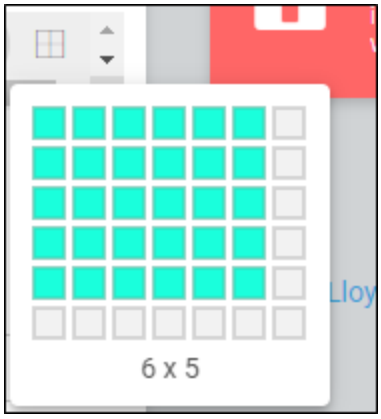
Flare Online's Review Editor supports tables. This means that reviewers can insert new tables, as well as make edits to existing tables.

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, 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 can 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 wan 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.

Tracking Review Edits

From the owner perspective, package files need to be managed, meaning that an owner should go through each reviewed file and accept or reject the changes that the reviewers make.

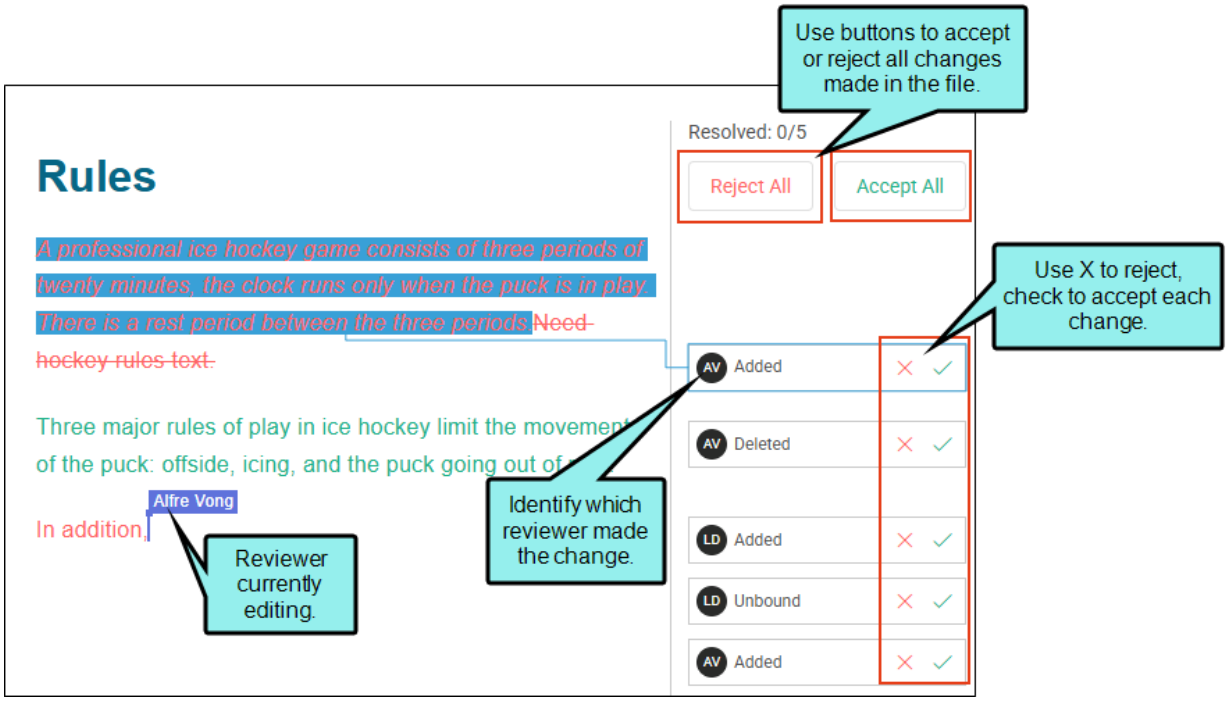
Permission Required?

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

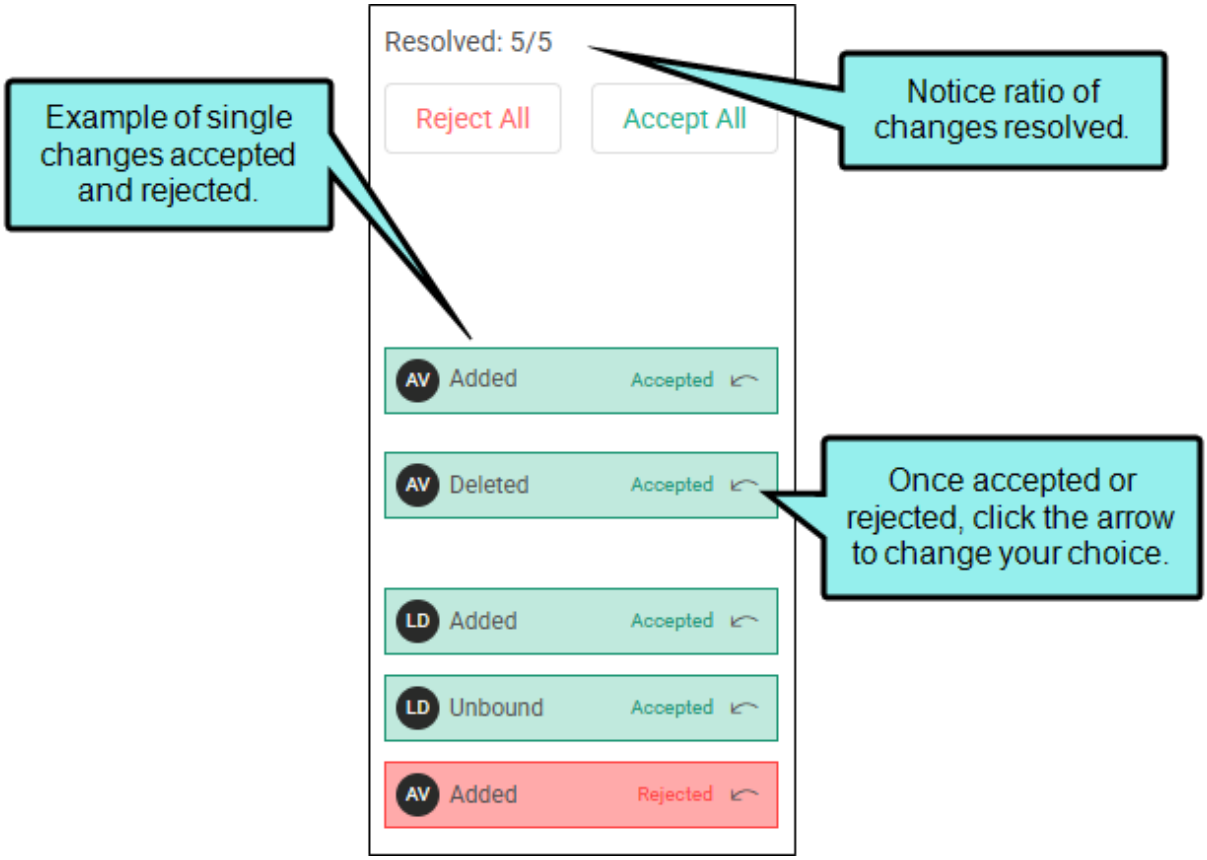
How to Accept or Reject Changes

Owners can efficiently accept or reject changes in a file, one at a time or all at once. This editing can happen during a review (before the reviewers submit files), or after reviewed files are individually submitted from reviewers. If an edit is accepted or rejected, then all reviewers who have the file open can see the update from the owner collaboratively in real-time. Flare Online lets owners accept and reject changes through the entire review process until a package is merged into the workspace.

1. From the Review Explorer **Open** tab, select a package and click  to show the files. (Alternatively, you can see package file(s) in the Review Packages Overview to the right. As an owner reviewing work, you can use the overview to determine how far along reviewers are in editing a file and the number of changes.)
2. Select a file from the package to review. It opens in the Review Editor.
3. On the right-side of the editor, view pending changes. In the editor you can see if anyone is currently editing the file, and who made specific changes.



Click to **Reject All**, **Accept All**, or select the noted changes individually (X to reject it, check to accept it).



NOTE Owners are not required to accept or reject every change, or even look at edits, before "closing" the file. Since the review process uses a collaborative editor like the regular workspace, all edits are retained in the file.

4. When the editing is complete, from the upper-right corner of the editor, click **Submit**. While in an Open state, files can be reopened for more edits, but the reviewer must select **Submit** again when done. A file remains Open until the owner puts it in a Closed state.

Closing Review Package

When all the edits are done, and changes are accepted or rejected in the editor in Flare Online, owners can close the review package.

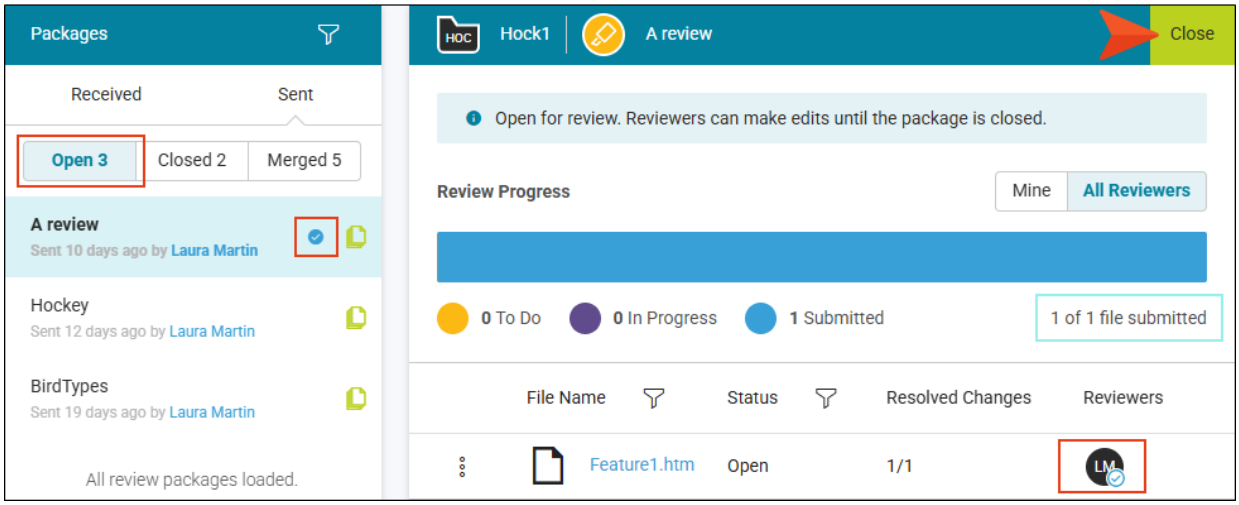
Permission Required?

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

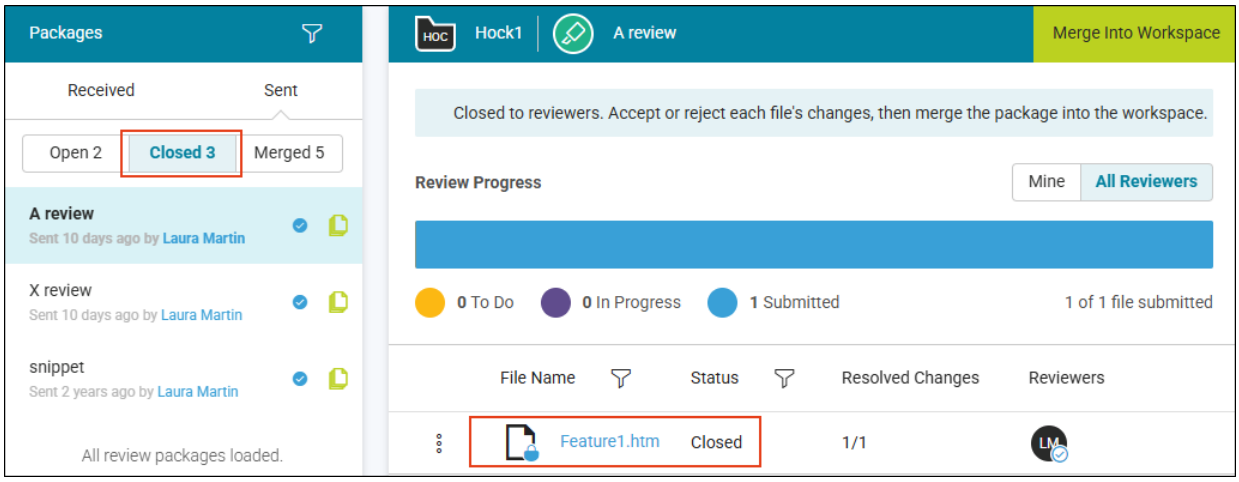


How to Close a Review Package

1. From the Review Explorer **Open** tab, select a package.
2. From the Review Packages Overview, click **Close**.



This closes all the files in a review package and puts an editing "lock" on them so no further editing can occur.



NOTE If you close a package by mistake, you can undo the action. From the overview three-dot menu, click **Set Status**. From the profile drop-down, select **Open** and **Save** the setting. (If you select the **Reset reviewer statuses to To Do** check box, this resets the status for all reviewers for that particular file.)

Merging Review Package

After the review is finished and closed for editing, the review package needs to be merged into the workspace.

Permission Required?

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

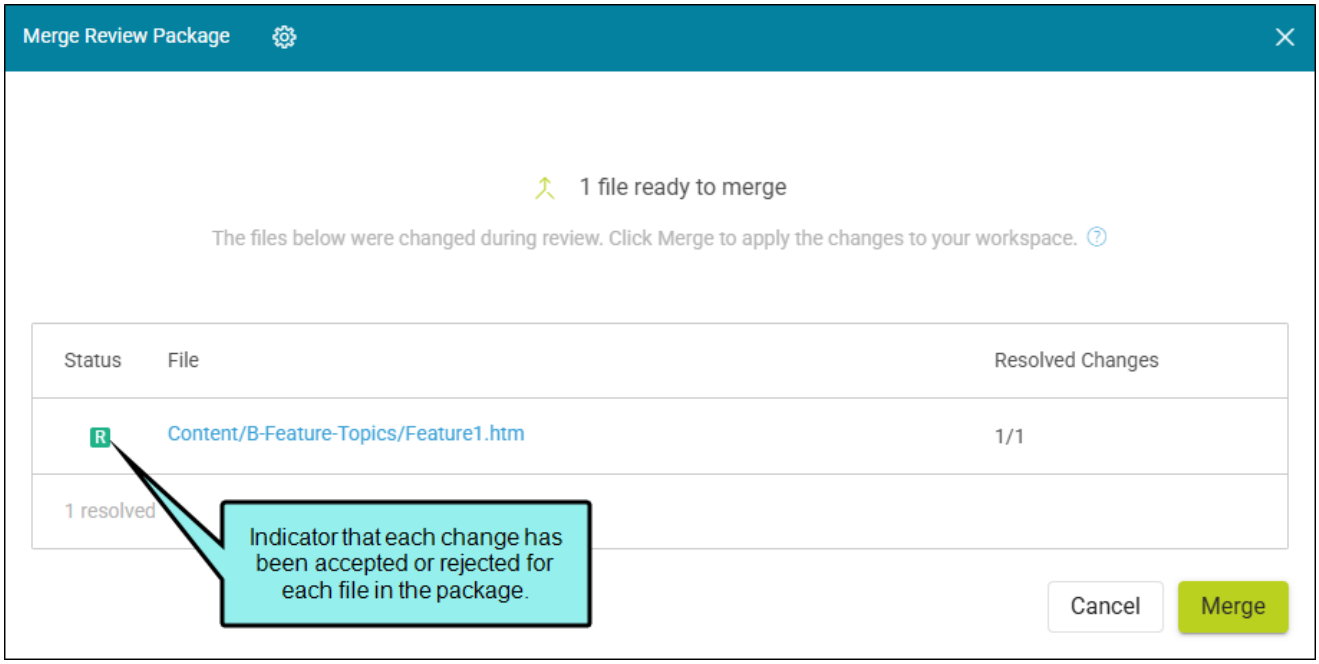


How to Merge a Review Package

1. From the Review Explorer **Closed** tab, select a package
2. From the upper-right corner of the Review Packages Overview, select **Merge into Workspace**. The Merge Review Package dialog opens.
3. Click **Merge**.

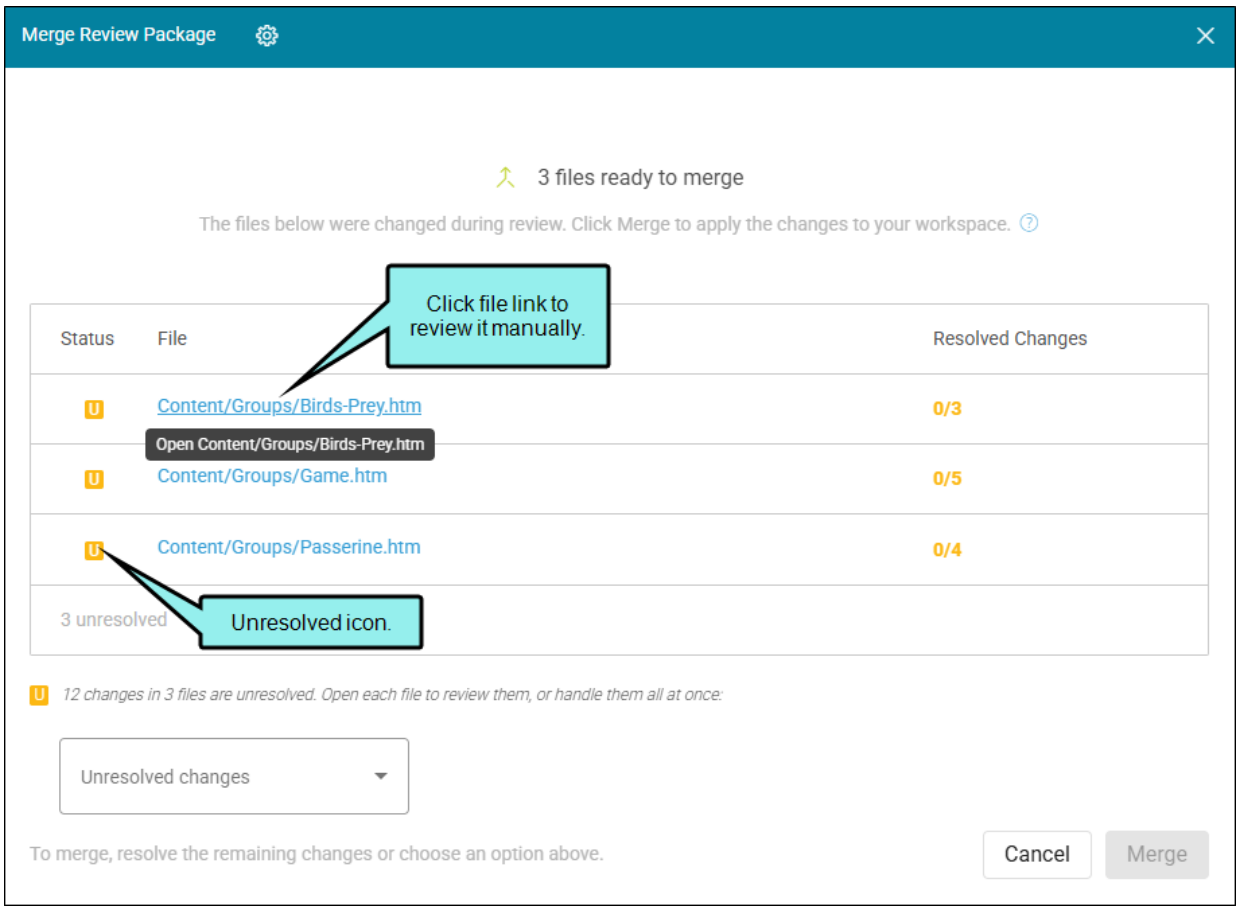
How to Handle Unresolved Changes

The Merge Review Package dialog alerts you to any unresolved changes. If each file in the package has been accepted or rejected successfully, the dialog indicates that with a small green "resolved" icon.

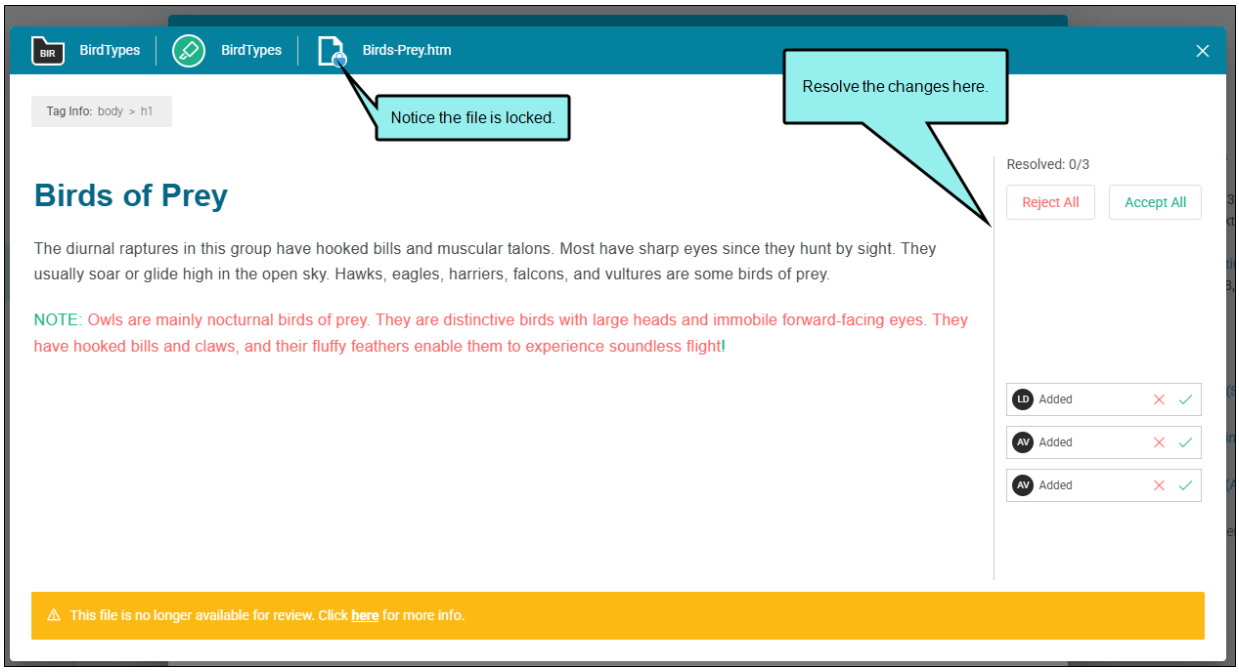


If the merge detects unresolved changes, the dialog indicates that with a yellow "unresolved" icon. You can do the following:

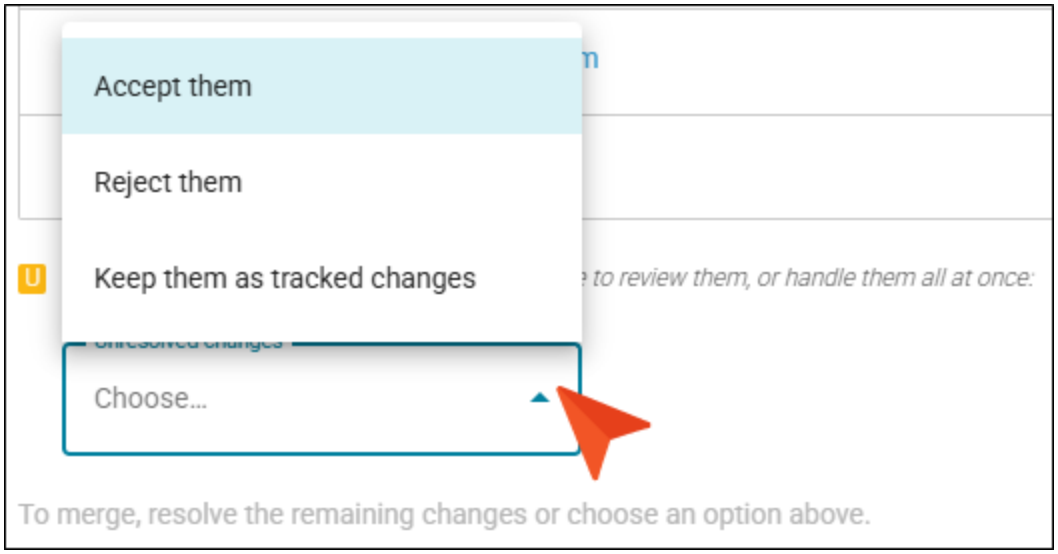
- From the merge dialog, click each file individually to open it manually to resolve the changes (without closing the merge dialog)



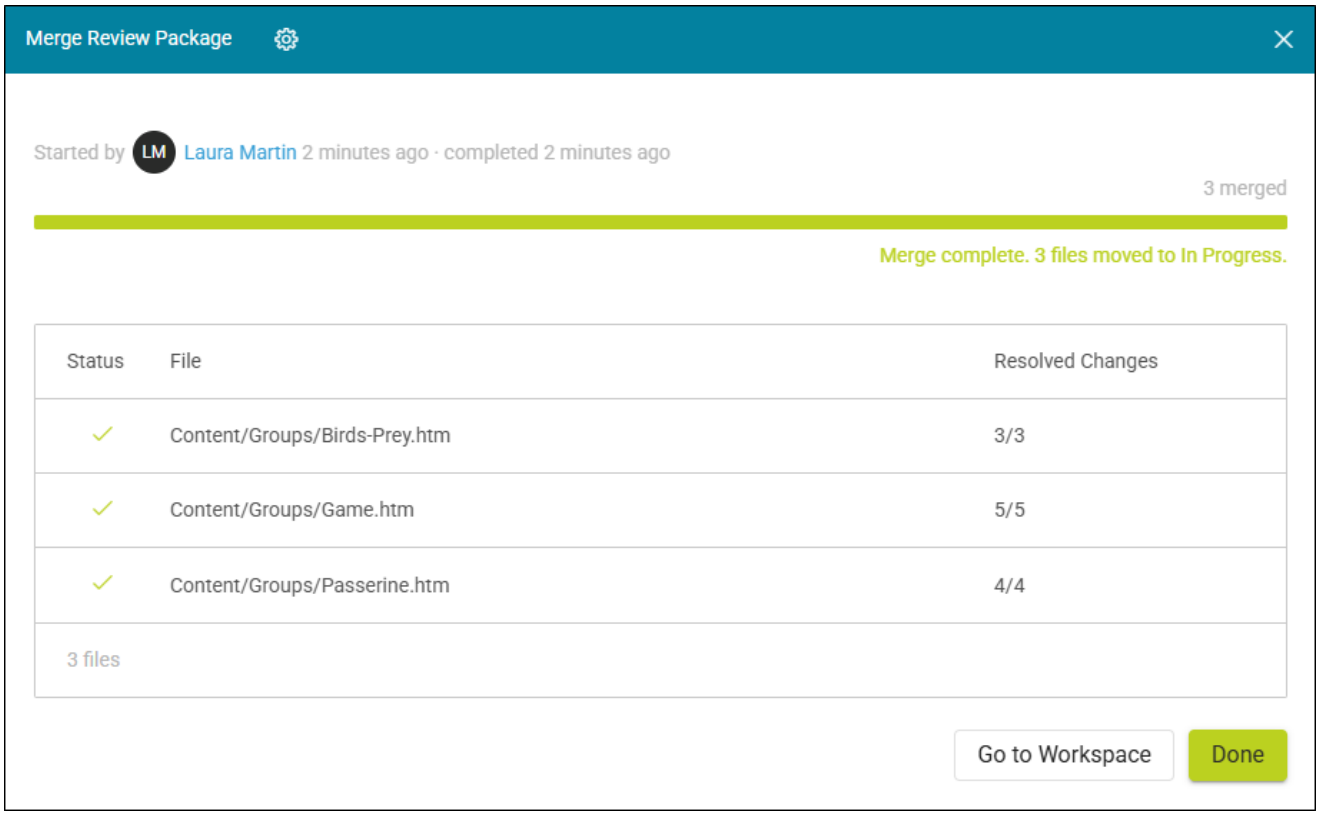
The file opens in an editor strictly for addressing the unresolved changes. Select to accept or reject the changes and close the pop-up editor.



- From the merge dialog, click the drop-down to select a choice for how to handle all the unresolved changes at once (i.e., Accept them, Reject them, Keep them as tracked changes).

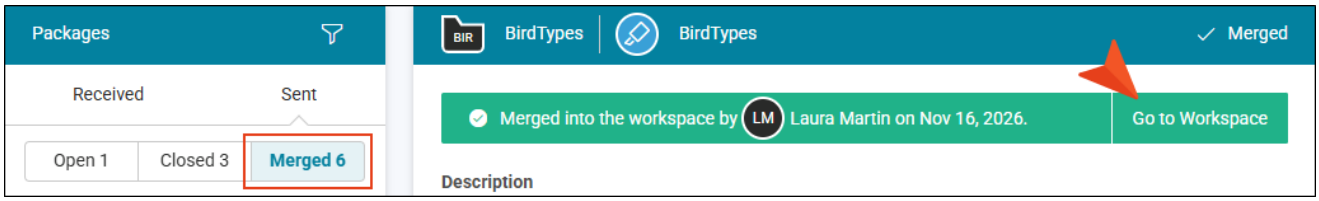


Click **Merge**. You will see the merge process and in the end a merge completed.



Click **Done**. The package moves to the **Merged** tab, and a banner displays telling you to go to the workspace. The package is sent to the workspace in collaborative editing mode (i.e., the merge function keeps the files in an uncommitted state)

You need to go to the regular workspace overview and commit the package file(s) back into the repository.



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 85
Viewing Review Profiles 100
Updating Review Status 104
Setting Notifications for Reviews 110

Managing Review Packages

When review packages are created in Flare Online, SMEs and authors can collaborate with the owner through editing, annotating, setting status, etc.

In addition to the reviewing and editing capabilities, the review process 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 > Repository > Commits page since it acts as a history log for file versions that are connected to your project. 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.

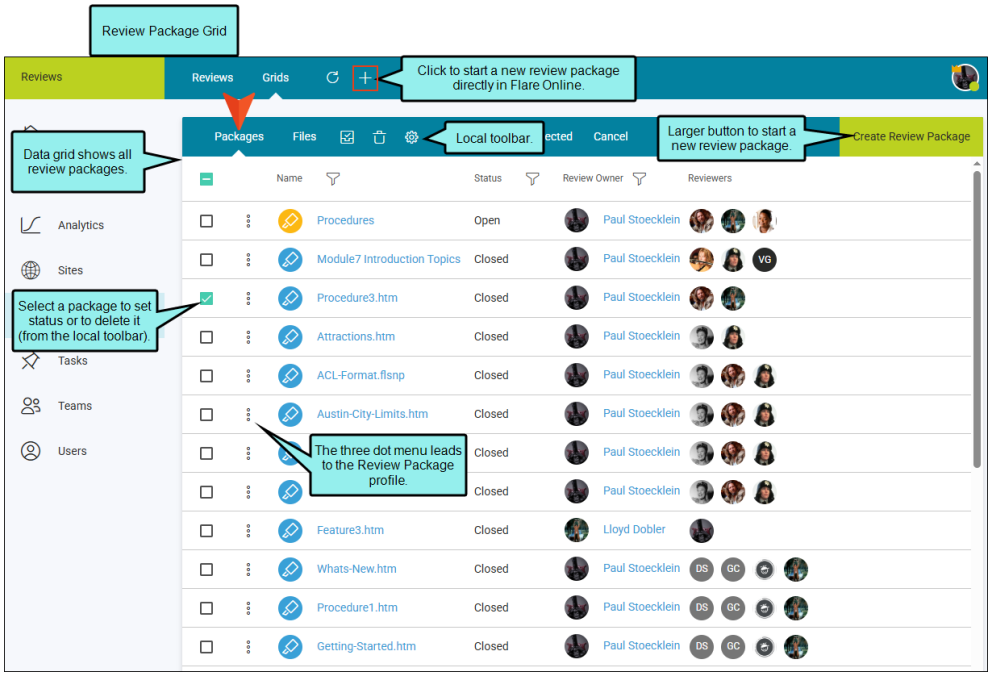
Packages and Files Grids

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.

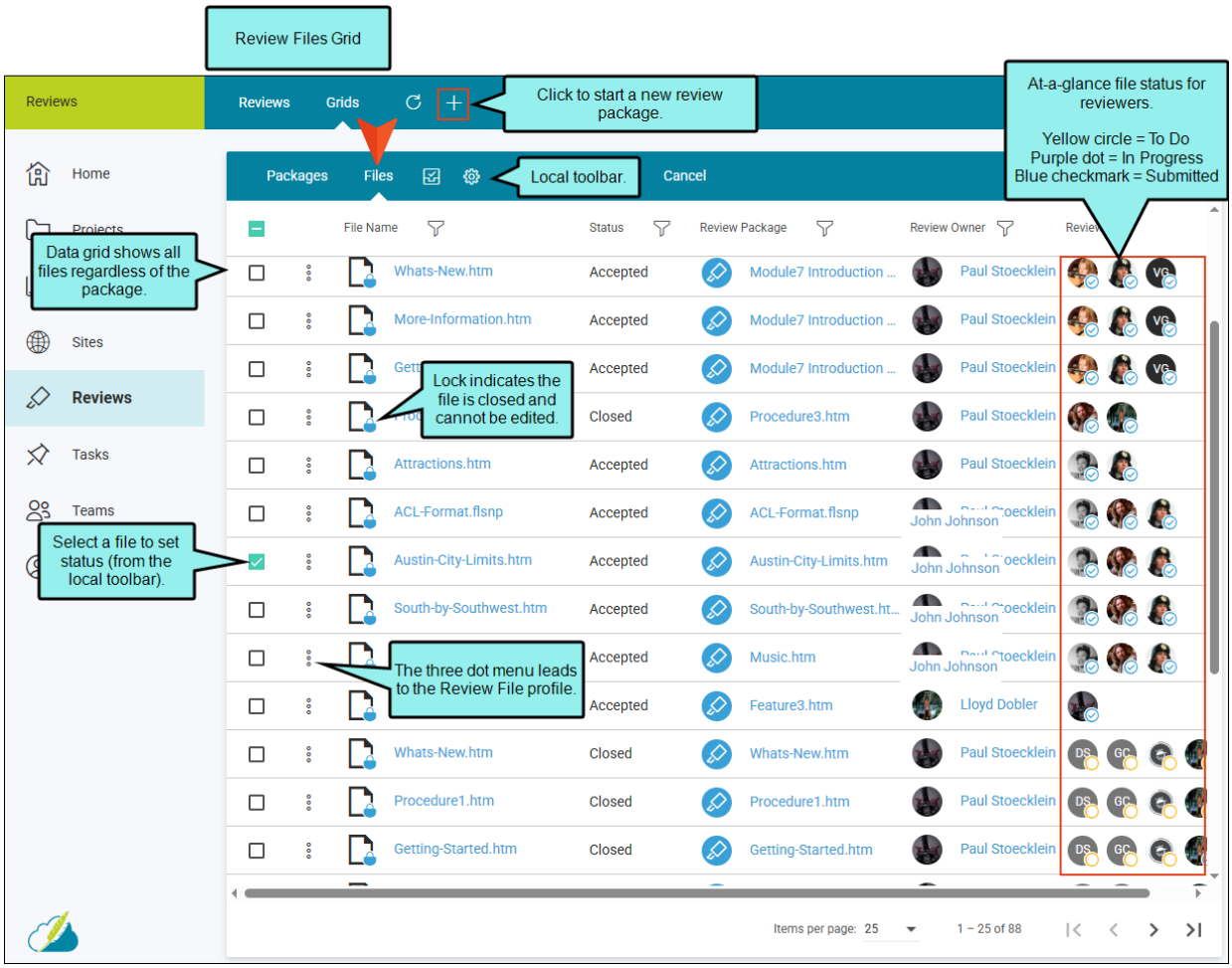
The main difference between the two grids is a matter of perspective—for managing reviews. You can do many of the same functions (e.g., adding reviewers, setting statuses, adding files), but the grid you use depends on if you want a package- or files-centric view of the project. Of course, there some 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. 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. 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.

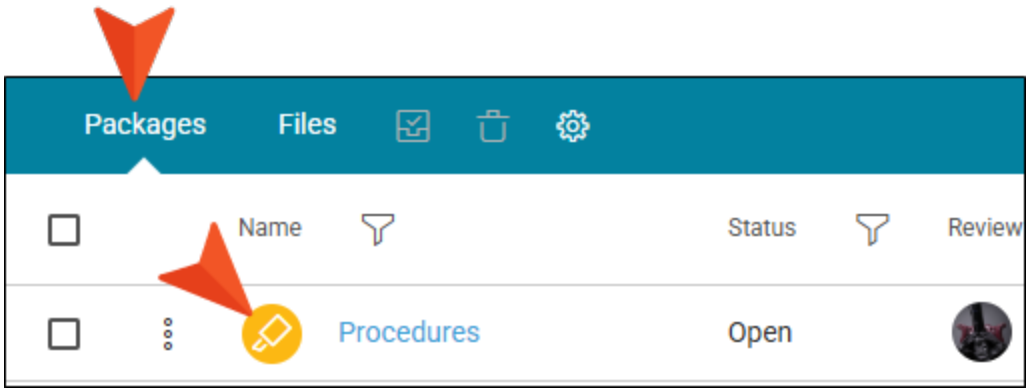


Updating Review Packages

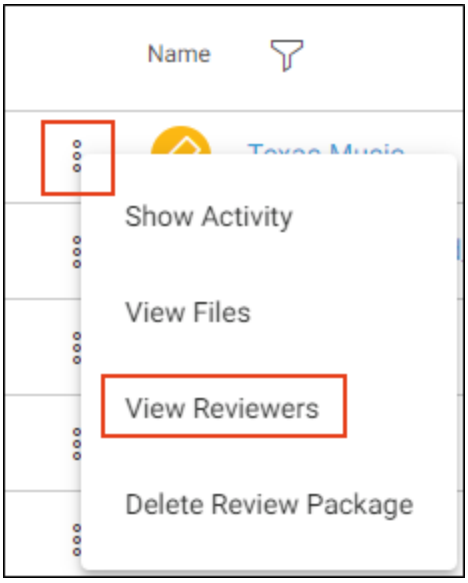
With the permission to manage reviews, you can make changes to a review package after it has been created and uploaded to Flare Online.

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.

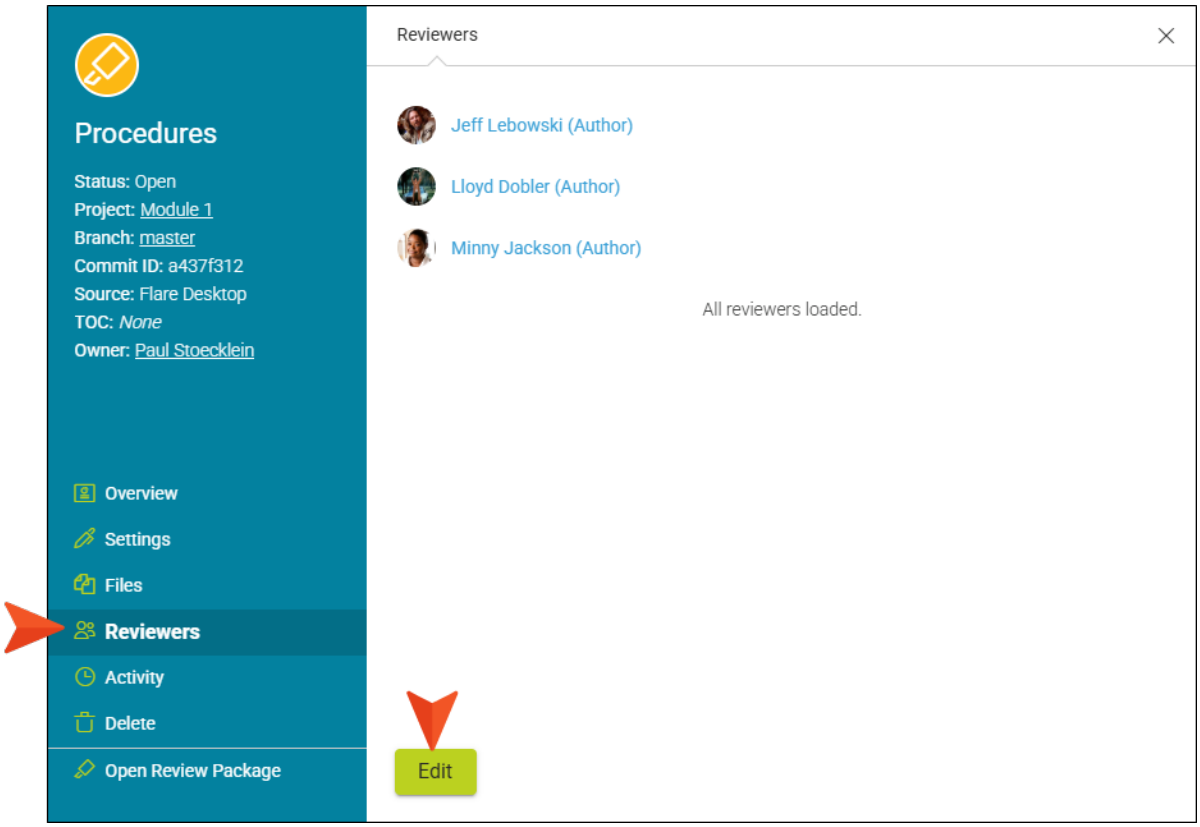


NOTE Alternatively, you can click the three dot vertical menu and select **View Reviewers**. This way also opens the Review Package profile, directly to the Reviewers option.



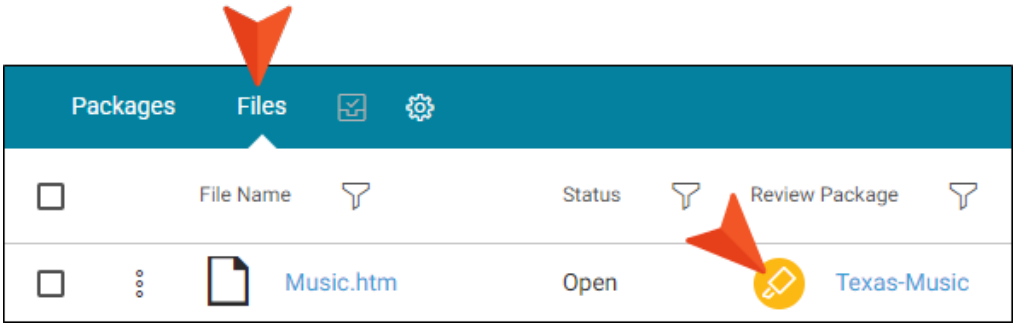
5. Select **Reviewers**.

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



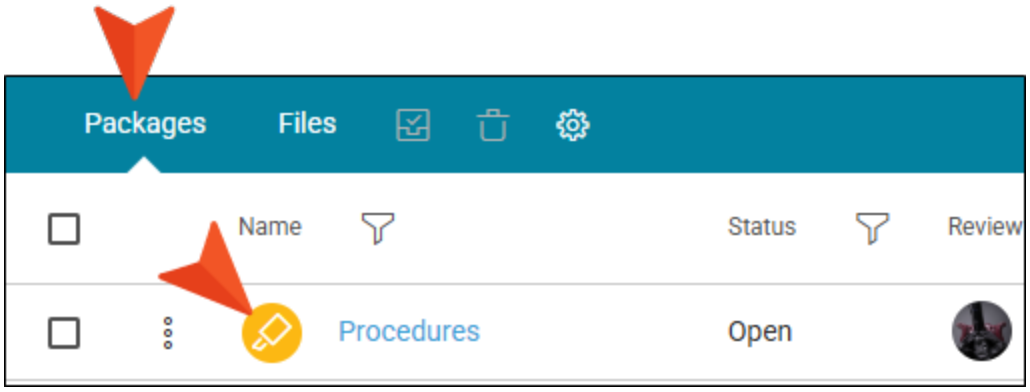
7. From the list of available reviewers, select to add a reviewer (or deselect to remove a reviewer.) Click **Save**.

> **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.

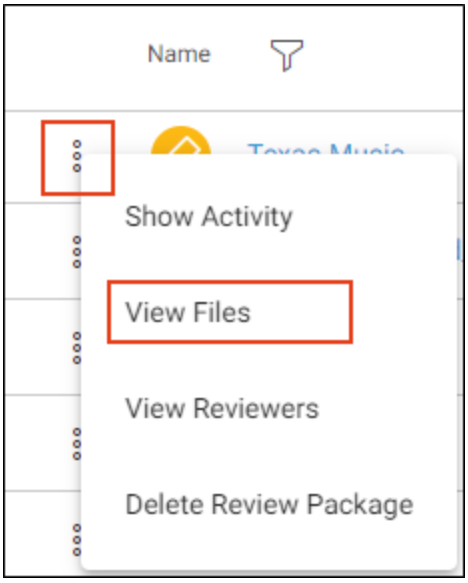


How to Add or Remove Files

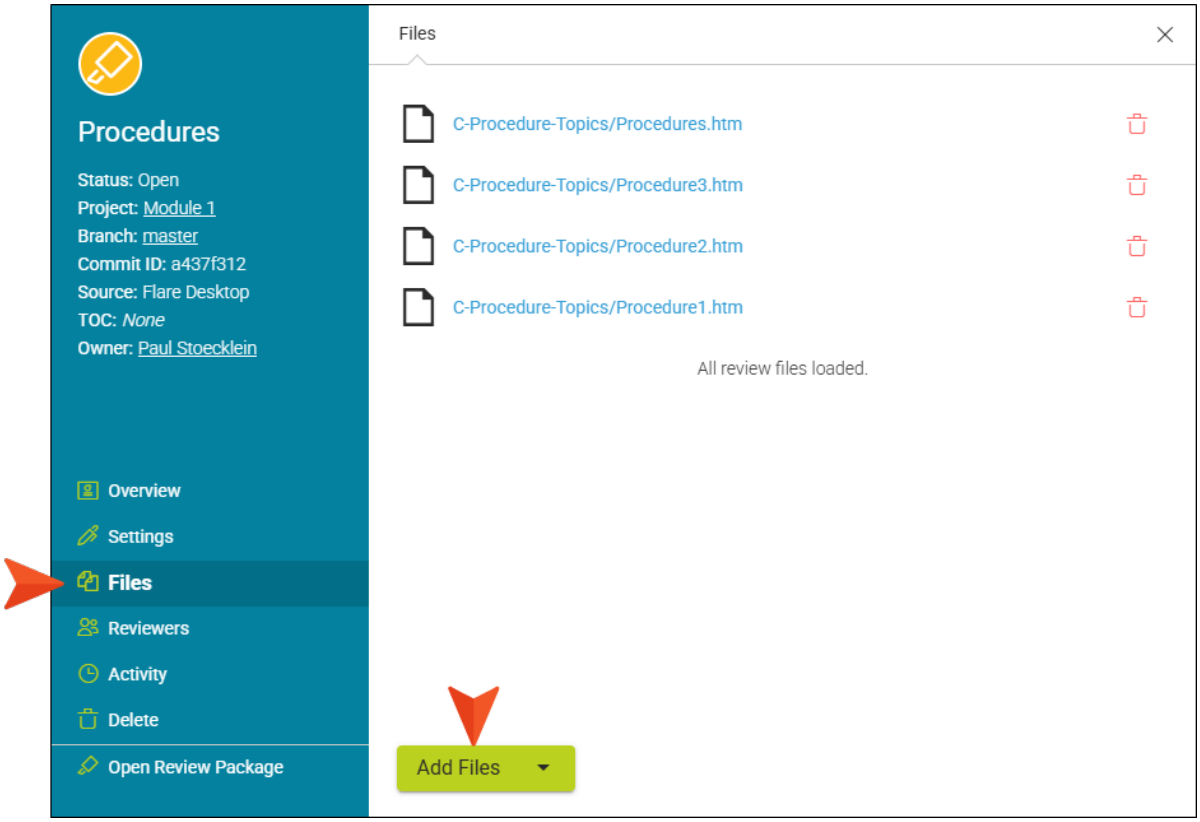
1. On the left side of the interface, click **Reviews**.
2. From the top navigation, click **Grids**.
3. Select **Packages**.
4. For the review package you want to add files to or remove files from, select its icon (under the **Name** column). The Review Package profile opens.



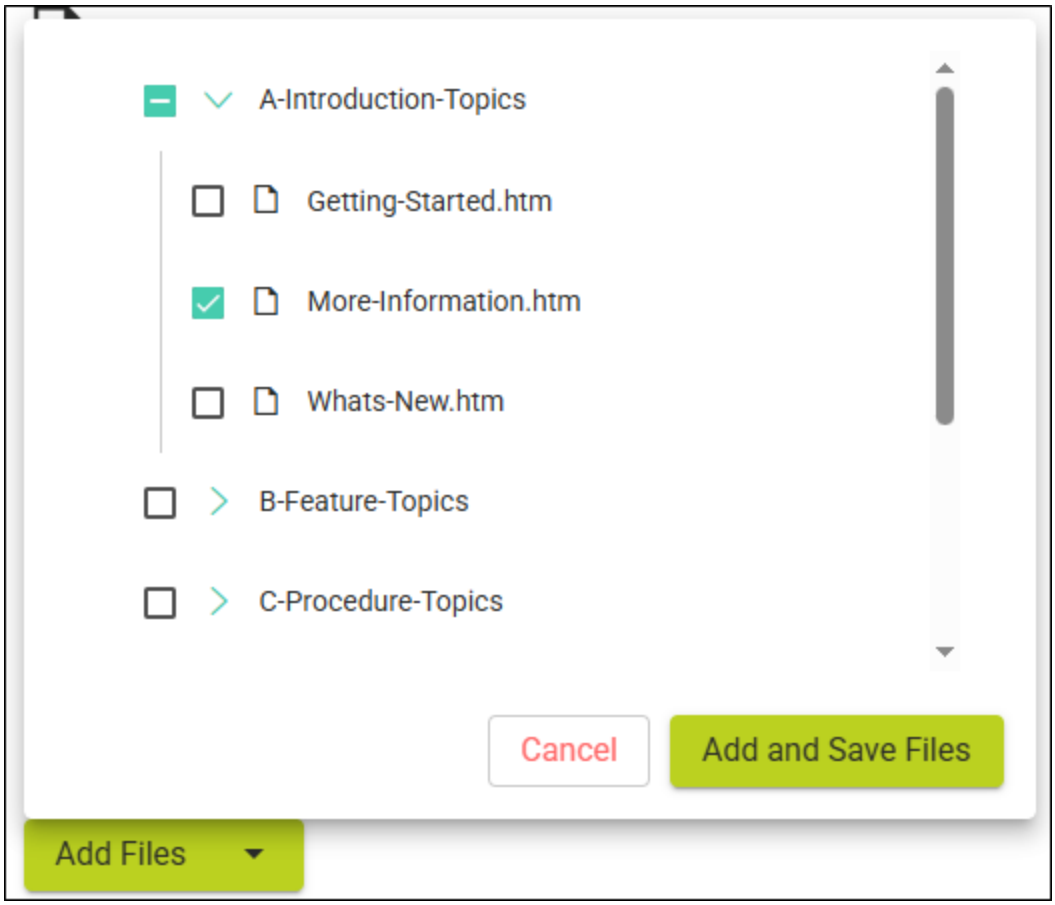
NOTE Alternatively, you can click the three dot vertical menu and select **View Files**. This way also opens the Review Package profile, directly to the Files option.



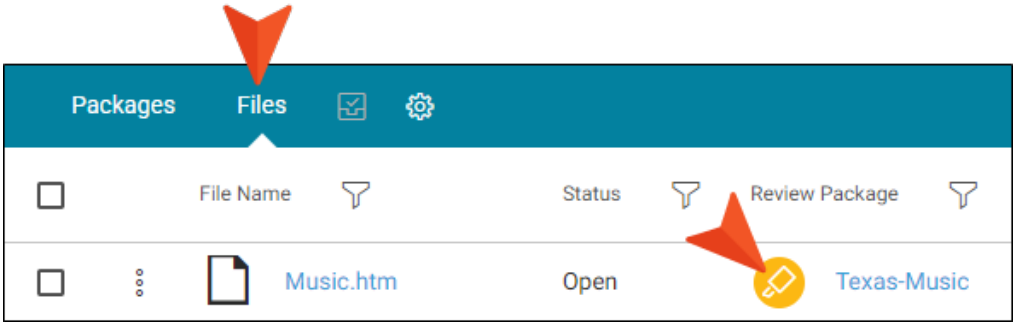
5. Select **Files**.
6. On the right, the current files are listed. Select **Add Files**. Also, to delete a file, you can click the trash icon to the right of the file.



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**.

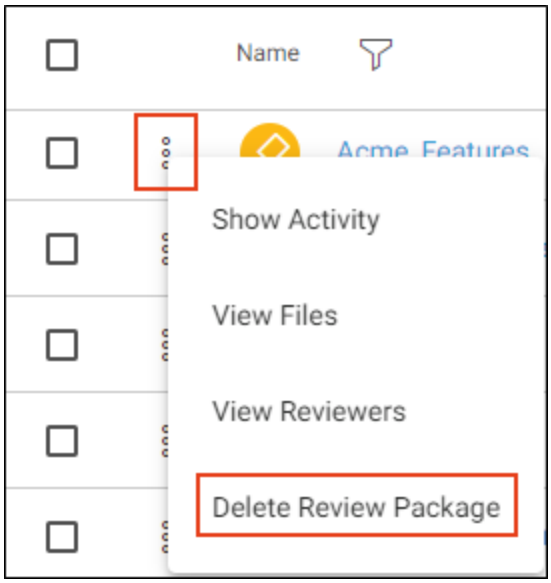


NOTE You can also use the Files grid to add files. The process is the same except you would select the review package icon under the Review Package column.

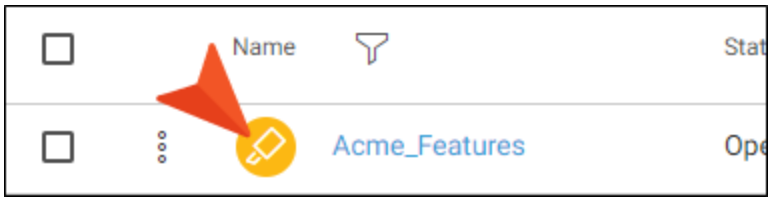


How to Delete a Package

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.



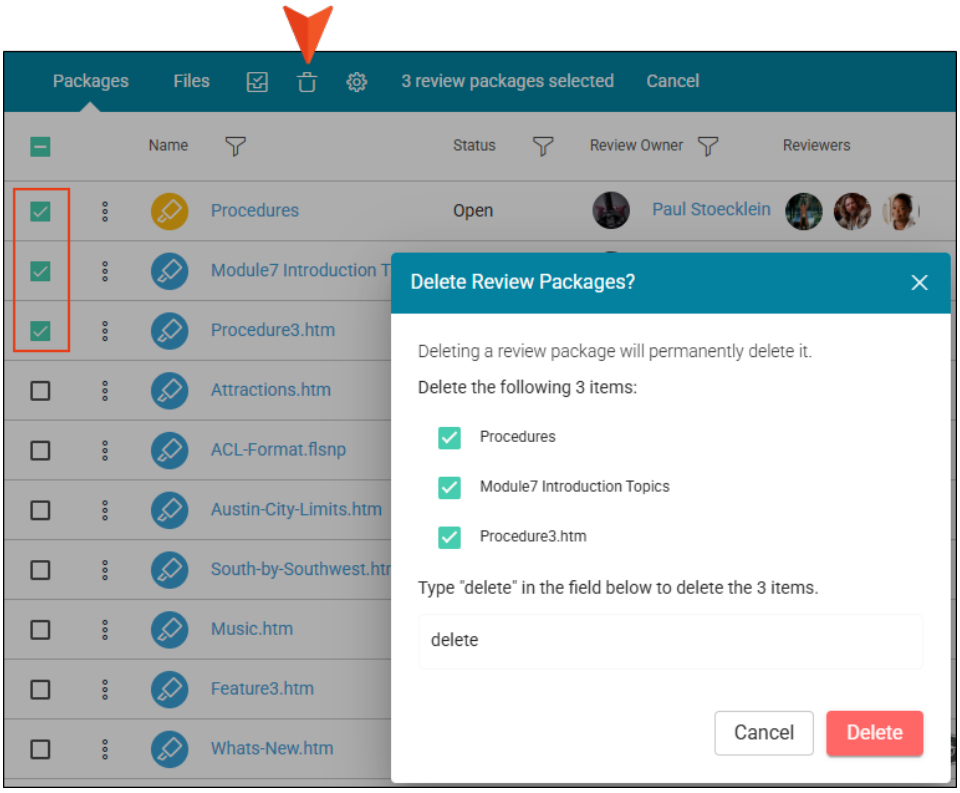
   - From the package row, click the package name icon.



     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 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.

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, having permission to manage reviews is required.

Permission Required?

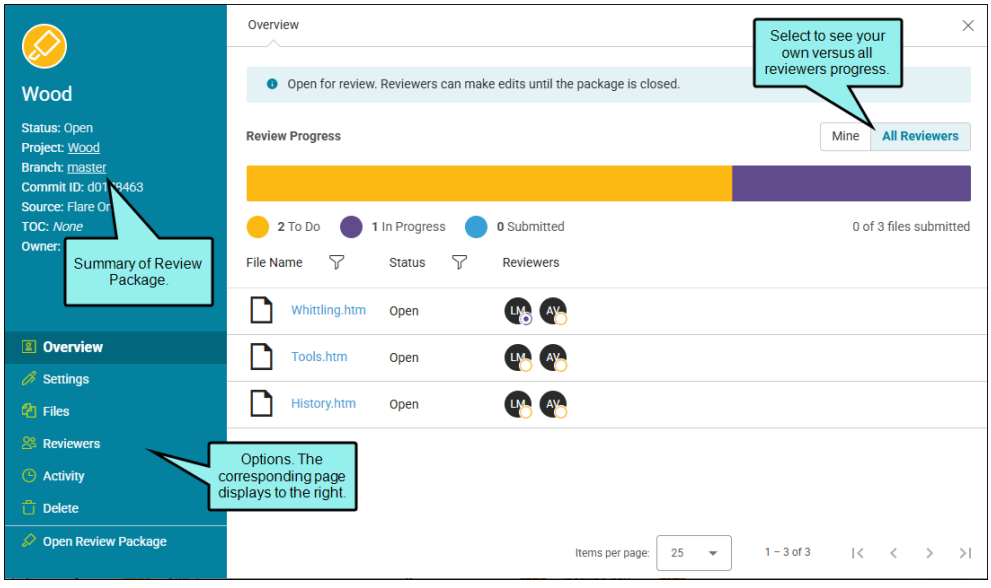
For this activity, you must have the following permission setting:



Review Package Profile

A Review Package profile is included for a package. It shows different pages for the overview, files, reviewers, activity, and settings.

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).



Using the Settings tab, you can edit the name, description, and the TOC for the package. Most importantly, you can change who the owner is and the status of the package.

The benefit is that owners have the ability to accept and reject changes throughout the entire review process until the package is merged into the workspace.

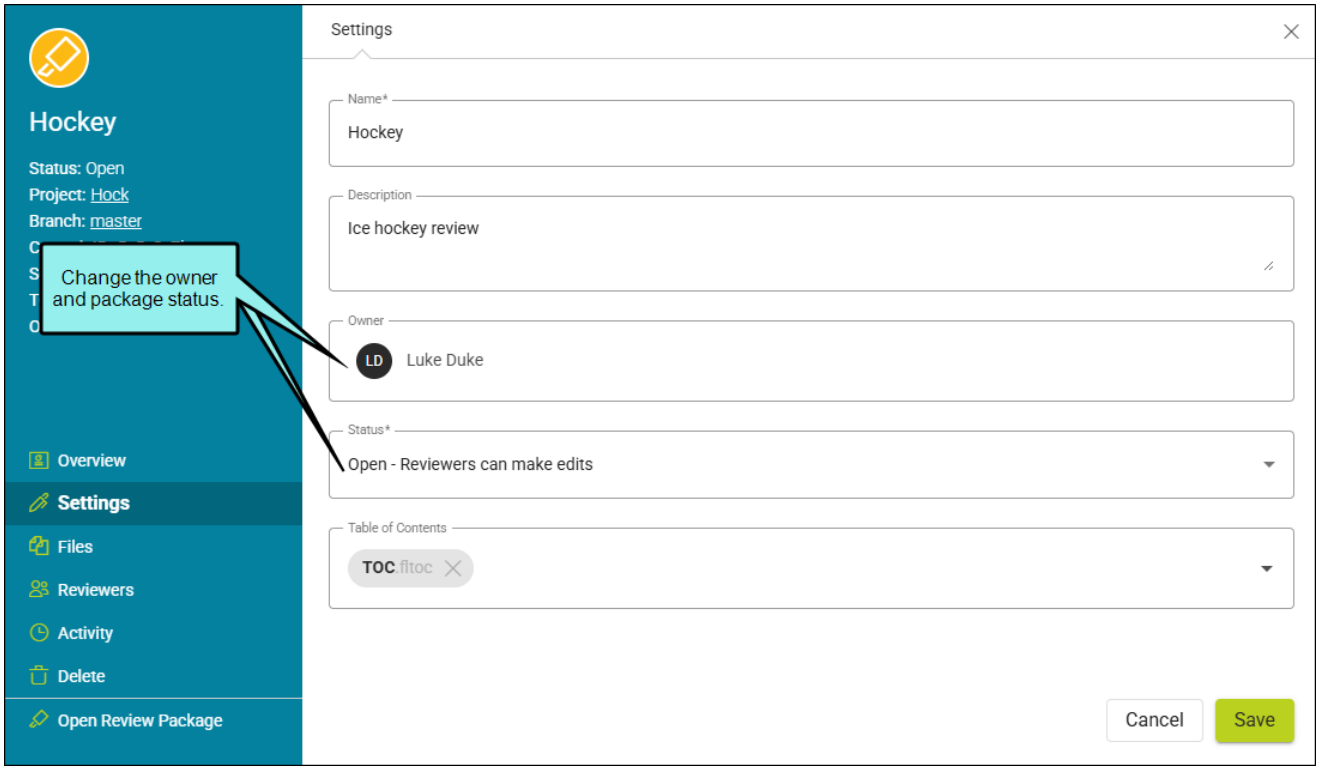
In Settings, from the Status drop-down, select on of the following:

- Open If you have a closed package, you can reopen it. When you reopen, a check box displays Reset reviewer statuses to To Do. If you check this box, any work "submitted" will be reverted to the To Do status for all reviewers. The package is moved back to the Open tab, the file lock is removed, and reviewers will need to review the file again and resubmit. Any previous tracked changes are maintained. If you do not check this option, the package opens but each file would stay closed and locked (i.e., each file in the package would have to be opened individually).

  If a merged package is set to Open, it moves to the Open tab for review but the status displays as completed. If you want reviewers to edit the files, you need to separately set those files to an Open status.

- Closed Set an Open or Merged package to Closed. If a package is merged again, you need to recommit its files into the regular workspace.

- Merged When clicking to merge, the merge dialog opens up from the profile to manage merging the review files.

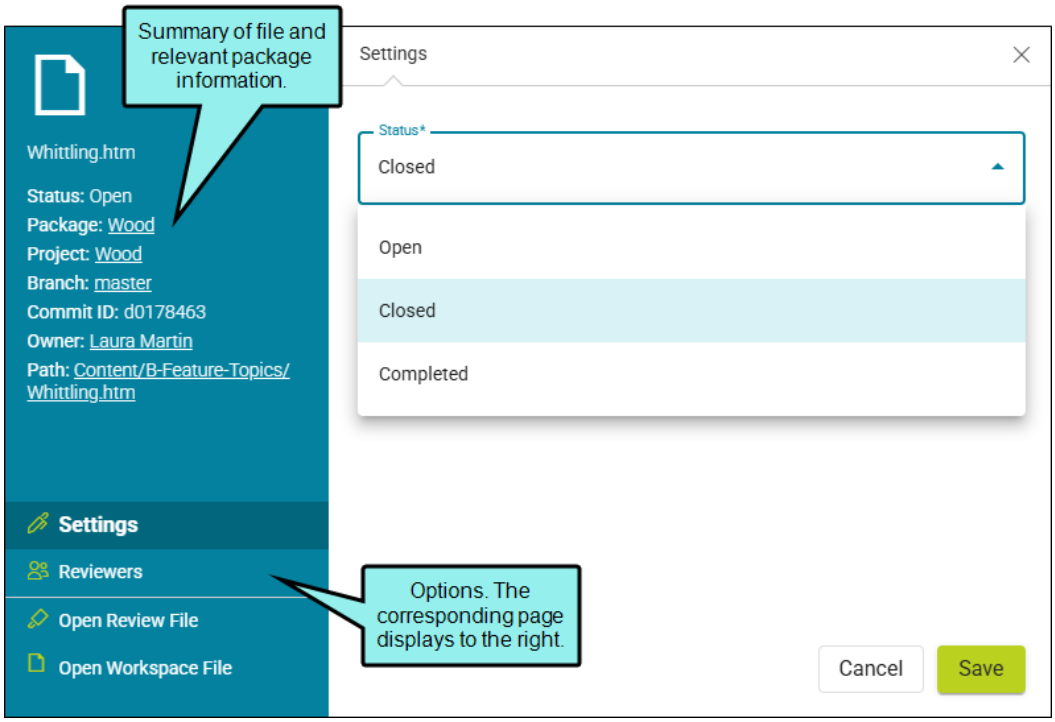


NOTE The Review Package profile is not to be confused with the review file profile Set Status option available from the Review Package Overview vertical three-dot menu (next to the file). This setting changes the review file status as Open, Closed, or Completed.

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.

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 Status

- Open The review package is open for review and reviewers can make edits. This is the default setting.
- Closed This stops reviewers from editing. All files in the package are set to a closed status (i.e., the package is no longer available for review).
- Merged All the changes are merged and sent to the workspace. To interact with the merged review package files you must go to the project's workspace overview page.

Review File Status

- Open The file from the package is open for review. This is the default setting.
- Closed The file from the package is closed for review.
- Completed The file from the package is merged into the workspace.

Reviewer Status

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

Setting Status

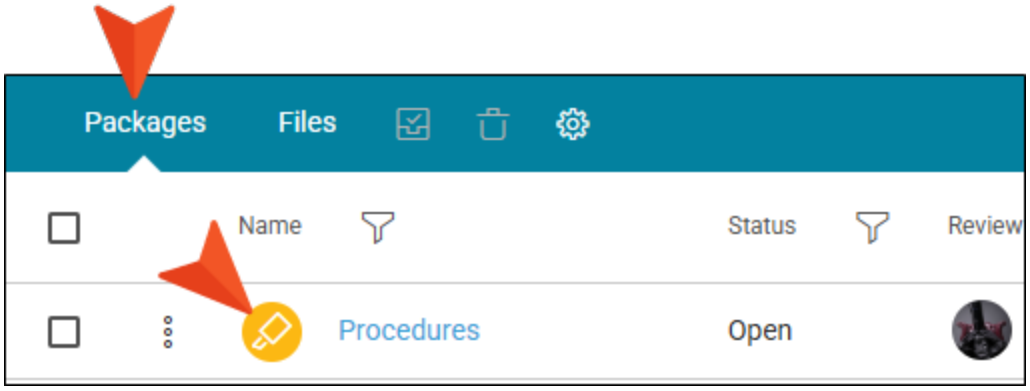
The status can be set singularly through the package or file profile dialogs, or in bulk through the set status dialogs.

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, merged). Click **Save**.

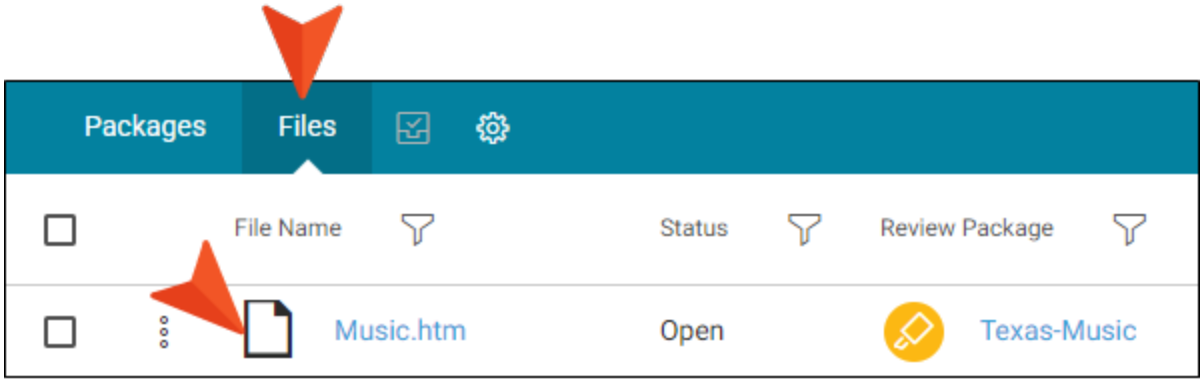
NOTE Alternatively, you can set the package status for multiple packages (in bulk) from the Packages grid local toolbar.

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**.

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 (i.e., open, closed, completed). Click **Save**.

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

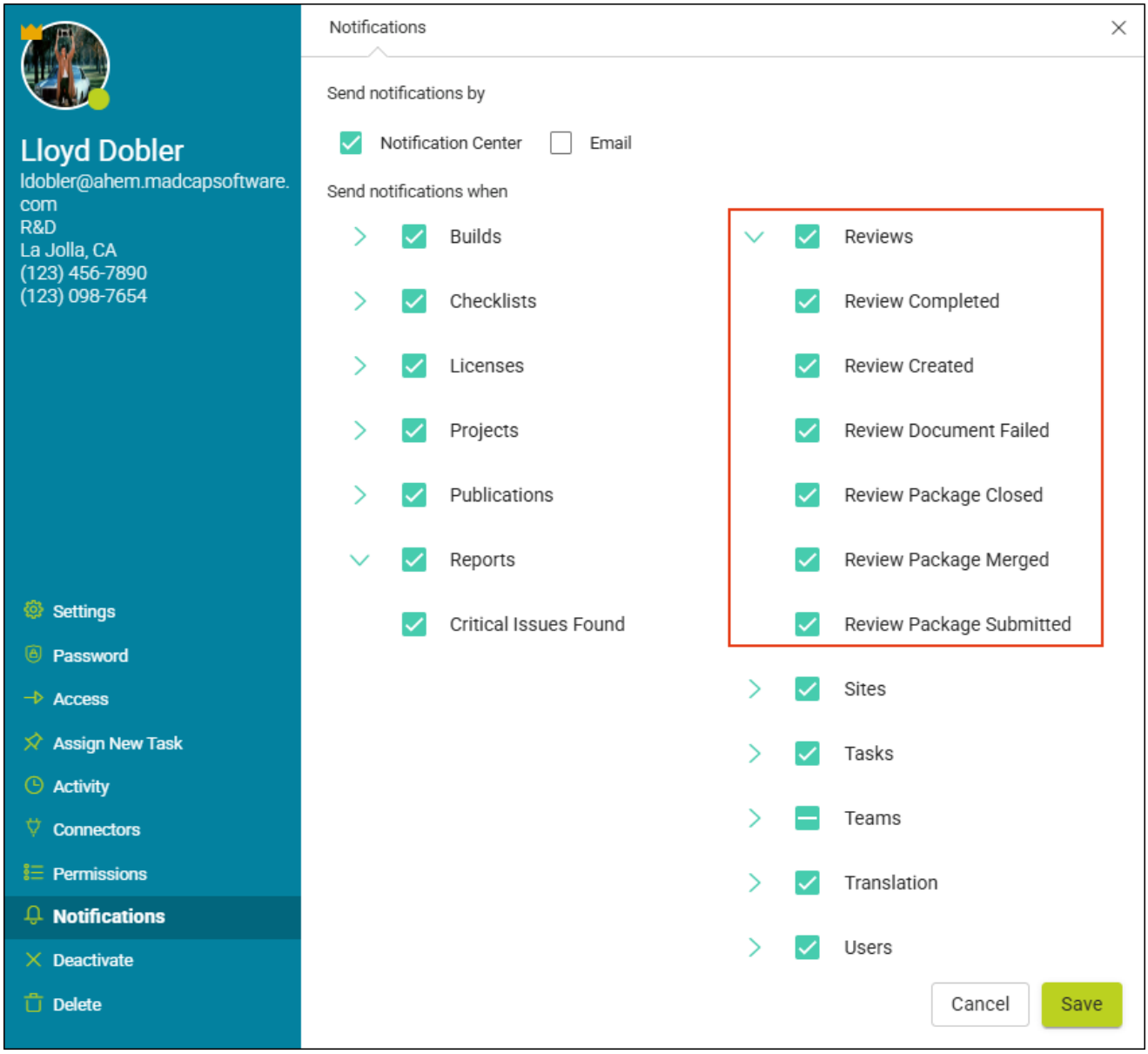
1. In the file row, select the check box.
2. From the local toolbar, select **Set review file status**.
3. In the Set Review File Status dialog, select the drop-down and update the status.
4. Click **Save**.

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. 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.

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.



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 Guide

Links Guide

Projects Guide

Reports Guide

Reviews Guide

Security Whitepaper

Sites Guide

Snippets Guide

Source Control Guide

Styles Guide

Targets Guide

Tasks Guide

TOC Guide

Topics Guide

Translation Guide

Users and Teams Guide

Variables Guide

What's New Guide

Widgets Guide