BrandMaker

BrandMaker GmbH

Review Manager
User Manual

Version 7.0

Copyright

Your feedback is important to us!
We would be grateful to be notified of any errors you may discover. Just send us an e-mail to documentation@brandmaker.com.

CONTENT

This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

Start

1

The Review Manager lets you discuss assets with your colleagues. The media objects may be images, documents, videos, or web pages. The Review Manager module allows both direct discussion within the review and, optionally, the issuance of an approval by the owner, taking into account the feedback of the participants.

A review can be started both in the Review Manager and in the Brand Template Builder and Job Manager modules.

Purpose of this documentation

The main purpose of this documentation is to provide you with information about how to start and edit reviews. It is aimed toward users who are either the owners or participants of a review. Owners start a review, while participants are users who comment on the asset under review and vote on its approval.

The final section covers which functions can be used by the administrator. These involve assigning rights and enabling functions in the system settings.

1.1 General information

This section covers the following general areas:

1.1.1 The review process

Reviews are processed in a defined state machine.
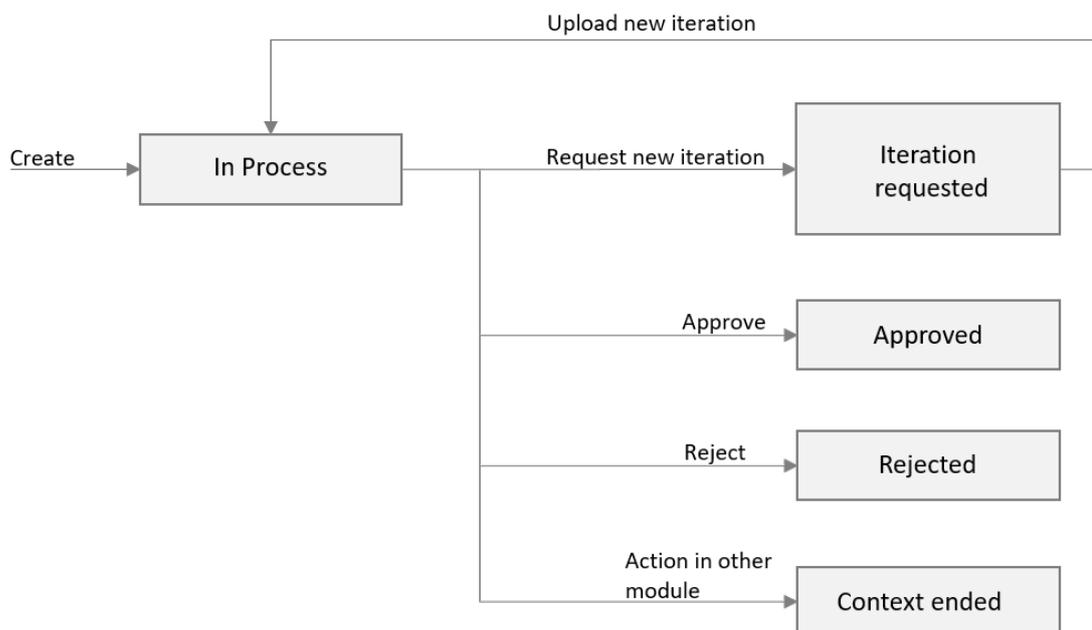
Once the review has been created, it will have a state of *In progress*. When the review is in this status, the owners, reviewers and guests can view the asset and leave comments. If an owner determines that a new asset is required for the review, e.g. an asset which has incorporated feedback, he or she requests a new iteration. This involves appointing an uploader to revise the asset. Until the revised asset is uploaded, the review remains in a state of *Iteration requested*. When the revised asset is uploaded by the uploader or the owner, the state of the review changes back to *In progress*. For more information about the various roles, please refer to *Roles* on the next page.

Iterations optimize the process of making gradual changes to an asset within a review. The module Review Manager offers the possibility to display finished iterations at any time and to compare two iterations with each other. A review can go through any number of iterations.

Three different actions will cause a review to be completed:

- The review is approved by an owner. This causes the review to be completed with a state of *Approved*.

- The review is rejected by an owner. This causes the review to be completed with a state of *Rejected*.

- The context in which the review was launched is no longer present. This can include the job in which the review was started. This causes the review to be completed with a state of *Context complete*.

1.1.2 Roles

The different roles available in the Review Manager module are
Owner, *Reviewer, Guest* and *Uploader*.

Owner

The user who started the review is the first owner of the review. Own reviews are listed on the start page under *My reviews*. This role involves creating the briefing and inviting participants. The owner also requests iterations.

The owner can also assign the role of owner to other participants. This allows other participants to take over the owner's tasks partially or completely.

Reviewer

Reviewers are participants who are invited to the review by the owner to be an reviewer. Reviewers can comment on the asset and cast their vote on whether the asset should be released. Reviews in progress are listed on the start page under *Approvals I participate in*.

Guest

Guests are participants who are invited to the review by the owner to be a guest. Guests can leave comments. The reviews in which the guest is involved are listed on the start page under *Reviews I participate in*.

Uploader

Whenever a new iteration is requested, the owner selects a user to act as the uploader and provide the revised asset. The uploader can view the review, download the asset and upload the revised asset. The uploader can see the review on the start page under *Reviews I participate in > Request new iteration*.

Editing options available to different roles

> **Note**
>
> The table below provides an overview of the editing options which are available to users who only have the MODULE_ACCESS right. Please note that additional options may be available to users with other rights.

Function	Owner	Reviewer	Guest	Uploader
Create and edit a briefing	✓	✗	✗	✗
Read a briefing	✓	✓	✓	✗
Invite a participant	✓	✗	✗	✗
Remove a participant from the review	✓	✗	✗	✗
Send message to reviewers and guests	✓	✗	✗	✗
Send message to owners	—	✓	✓	✗
Check asset: create comments and markings	✓	✓	✓	✗
Change their own comments and markings	✓	✓	✓	✗
Delete their own comments and markings	✓	✓	✓	✗
Download comments and markings	✓	✓	✓	✗
Request iteration	✓	✗	✗	✗

Function	Owner	Reviewer	Guest	Uploader
Upload iteration	✓	✗	✗	✓
Compare iterations	✓	✓	✓	✓
Change iteration	✓	✓	✓	✓
Approve and reject (This includes the voting of the reviewers.)	✓	✓	✗	✗
View progress	✓	✓	✓	✗
Open asset details	✓	✓	✓	✓
Download an asset	✓	✓	✓	✓

1.1.3 Approvals

Your administrator can set whether reviewers have the ability to vote on whether to approve an asset with changes. This means that the reviewers approves the review on the condition that revisions are made (for example that licenses are cleared or the image is re-edited). If this option is enabled, reviewers are able to see the *Approve with changes* button. If it is not enabled, only the *Approval* button is available. Owners only ever have the *Approval* button available.

Please note that the decision of an reviewer has no impact on the status of the review. The review is only completed on the basis of the decision of the owner, who assigns the review a status of *Rejected* or *Approved*.

1.1.4 Supported file formats

The Review Manager supports the file formats in the tables below. If appropriately marked, the file can be displayed with a high resolution graphic. If this is not the case, the large preview image from the Media Pool module will be used.

Graphics file formats

Format	High res- olution?
AI	✖
BMP	✓
EPS	✖
GIF	✓
JPG/JPEG	✓
PNG	✓
PSD	✓
TIFF/TIF	✓

Document formats

> **Note**
>
> Note that the formats specified below cannot be displayed or edited as such in the Review Manager.

Format	High res- olution?
DOC	✓
DOCX	✓
DOTX	✓
INDD	✓
IDML	✓
PDF	✖
POTX	✓
XLS	✓
XLSX	✓

Video formats

Format	High res-olution?
AVI	✖
FLV	✖
MP4	✖
MPG	✖
WMV	✖
SWF	✖

Web pages

> 📋 **Note**
>
> Please note that the review of external web pages is not activated by default. Please contact your responsible BrandMaker contact person.

1.1.5   Web page reviews

> 📋 **Note**
>
> Please note that the review of external web pages is not activated by default. Please contact your responsible BrandMaker contact person.

You can also start reviews for external web pages. This function must be activated by BrandMaker GmbH. The URL of the server that generates the screen shots needed for the review must be entered in the system.
Enter the URL of the website into the review. A screenshot of the web page which is used as the basis for carrying out the review, is generated automatically in the background. You can also combine several web pages in one review.

1.1.6 Video reviews

Reviews can be created for videos in supported formats. The video loaded to the Review Manager can be played back in a player. You can stop the playback to enter a marker or comment at the desired point. The timeline of the player displays all of the existing markers. This allows participants to jump to the individual markers quickly and easily.
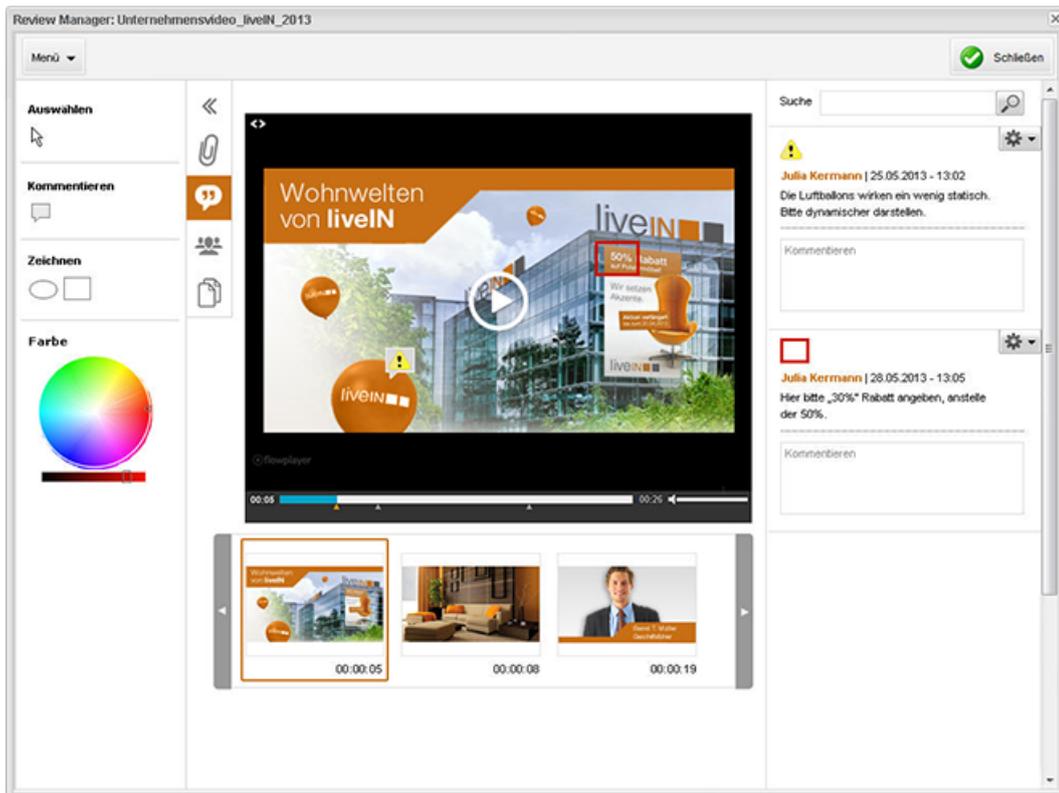
1.2 Style Conventions

Notes appear in a dark gray box.

Warnings appear in a red framed text box.

Paths to follow are written like this: *Click > x and then > y*.

1.3 Other Documentation

In the following list you will find links to the documentation of other modules:

- [Media Pool User Help 7.0](#)

This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

Structure

2

This section covers the structure of the Review Manager module. The module consists mainly of the following pages:

- *Homepage* on the facing page

-

2.1 Homepage

To display the homepage of the module, click > *Review Manager*:

The start screen provides a list of the reviews in which you are involved subject to the currently selected filters. The filters are displayed on the left. When you first open the screen, all reviews will be displayed for which you are the owner, regardless of the status of the review. You can find a description of the available filters in *Search for a review* on page 35.

Table setup

The table contains the following information about each review:

Column	Description
Preview	Preview image for asset
Review	Name of the review and review ID
Asset	Name of the asset and asset ID
Context	The module in which the review was created, e.g. Review Manager, Job Manager or Brand Template Builder
Start date	The date on which the review was created
Last update on	The date on which the review was last updated

Column	Description
Completion date	The date by which the review should be completed (specified when creating the review)
Status	Status of the review, see *The review process* on page 9
Progress	Progress of the review, see *View progress* on page 41

Up to 20 reviews are displayed in the table on one page. If more reviews match the filter, use the buttons above the table to scroll through the pages. You can refresh the view using the button.

Associated tasks

- *Search for a review* on page 35
- *Open a review* on page 37
- *Creating a review* on page 29

2.2   Review editor

The review editor is used to edit the review and complete it.
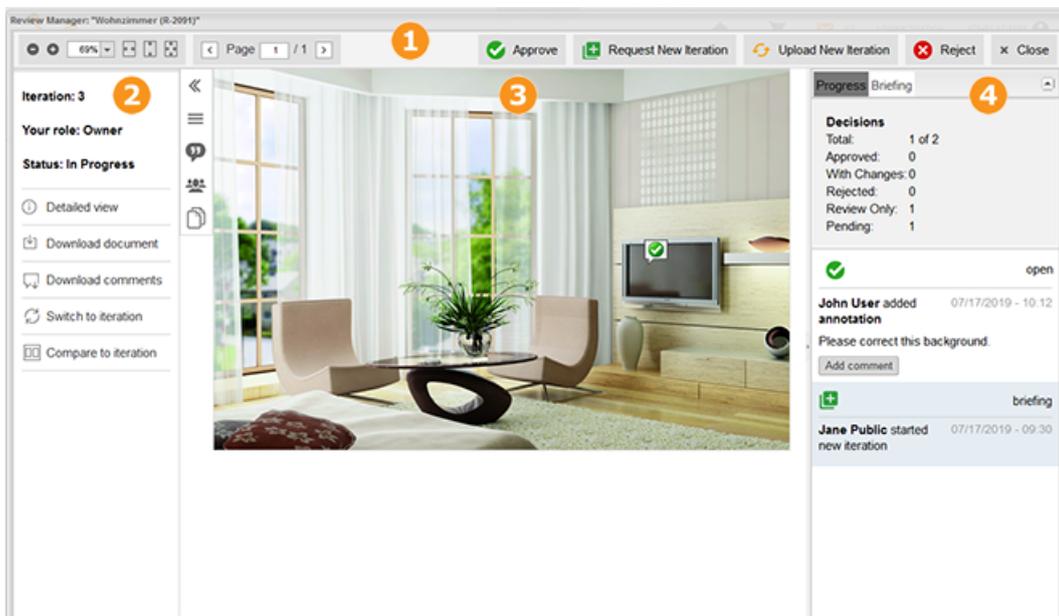
 Control row

The buttons in the top row are used for the following tasks:

Section	Description
⊖ ⊕ 69% ⌄ ⊞ ⊡ ⊠	Set the display size for the page.
‹ Seite 1 / 1 ›	Scroll through a document with multiple pages.
Right-hand area of the control line.	The decision functions for your role will be available, e.g. *Request new iteration* for owners or *Approval with changes* for reviewers.
Close	Closes the review.

 Left sidebar

The following functions and sections are available in the left sidebar:

Section	Description
«	Opens and closes the sidebar
☰	Info area Associated tasks: • *Open asset details* on page 42 • *Downloading an asset* on page 42 • *Download comments and markings* on page 49 • *Change iteration* on page 46 • *Compare iterations* on page 45
💬	Comment area Associated tasks: • *Comment on and mark assets* on page 43
👥	Participant area Associated tasks: • *Invite a participant* on page 31 • *Send message to owners* on page 39 • *Send message to reviewers and guests* on page 40 • *Remove a participant from the review* on page 49
🗐	Page overview Opens an overview of all pages belonging to the asset.

③ Asset

A preview image of the asset or a preview of each page (for documents with multiple pages) will be displayed. You can add comments and markings to the preview image.

You can play videos via the control bar. Stop the video at the appropriate point to insert a comment. The point is marked on the time line by a small triangle. You also have the option of playing the video in full-screen mode. However, you cannot insert comments in full-screen mode.

> 📋 Note
>
> Videos are always displayed as large as possible. With small-format videos this can lead to a pixelated display.

If you compare iterations, this area is displayed along with the left sidebar once per iteration.

Associated tasks:

- *Comment on and mark assets* on page 43

4 Progress, briefing and notes

The right sidebar can be used to access the progress of the review, the briefing and the notes added with comments and markings.

Associated tasks

- *Edit the briefing* on page 38
- *Read a briefing in the review editor* on page 38
- *Change my comments and markings* on page 46
- *Delete own comments and markings* on page 48
- *View progress* on page 41

This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

Process

3

The review process is divided into the following steps:

- *Start review* on the facing page
- *Edit review* on page 34
- *Complete review* on page 53

> **Note**
>
> The following sections assume that the users involved in the review only have the editing options available which correspond to the MODULE_ ACCESS right. Please note that additional options may be available to users with other rights.

3.1 Start review

To start a review, the owner must perform the following tasks:

- *Creating a review* below: this involves creating a review in the Module Review Manager or in a different module.

- *Invite a participant* on page 31: The owner invites other users to the review to act as reviewer or guest.

Next Step

Once the review has been started, it is processed by you and the participants; see *Edit review* on page 34.

3.1.1 Creating a review

To create a review, first select the asset to be reviewed. This can be done in two different ways:

- Selecting a file which has already been created in the Media Pool as an asset.

- Selecting a file in your file system. If you choose this method, the file will be uploaded and created as an asset in the Media Pool as part of the *My Reviews* collection. The asset will not be available for other users in the Media Pool.

Creating a review for an asset from the Media Pool

1. Click > *Review Manager*.

   The *Reviews & approvals* page will be displayed. This provides an over-view of all of the reviews for which you are the owner, in addition to all reviews in which you are involved as a guest, reviewer or uploader.

2. Click *Add* at the top of the overview.

   This will open the *Review object* dialog box.

3. Go to the *Media Pool* tab.

4. Search for the asset that you want to review. For additional information about the search function in the Media Pool, please refer to the Media Pool user guide; see *Other Documentation* on page 17.

5. Click the plus sign for the asset.

   This will open the briefing editor.

6. Optional: enter a due date if the review needs to be finished by a specific date.

7. Optional: change the name of the review. The name of the asset is used by default.

8. Optional: use the *Briefing* field to document any details which may be important for participants. Use the formatting functions while doing so. You can display the names of the functions if you hover over the buttons. If you do not enter any text, a generic default text will be displayed.

9. Click *Start Review*.

You have now created the review. The review will be opened in the review editor.
You are the owner of the review and are therefore responsible for all of the processing.

Creating a review for your own asset

1. Click > *Review Manager*.

   The *Reviews & approvals* page will be displayed. This provides an overview of all of the reviews for which you are the owner, in addition to all reviews in which you are involved as a guest, reviewer or uploader..

2. Click *Add* at the top of the overview.

   This will open the *Review object* dialog box.

3. Go to the *Import* tab.

4. Click *Browse*.

   A dialog box opens in which you can browse your file system.

5. Select the file and click *Open*.

   This will display the *Review object* dialog box with the *Import* tab.

6. Click *Import*.

   This will open the briefing editor.

7. Optional: enter a due date if the review needs to be finished by a specific date.

8. Optional: change the name of the review.

9. Optional: use the *Briefing* field to document any details which may be important for participants. Use the formatting functions while doing so. You can display the names of the functions if you hover over the buttons. If you do not enter any text, a generic default text will be displayed.

10. Click *Start Review*.

You have now created the review. The review will be opened in the review editor.
You are the owner of the review and are therefore responsible for all processing.

Next Step

In the next step, you will invite participants; see *Invite a participant* below.

3.1.2 Invite a participant

This step involves inviting additional participants to a review. Other users who are authorized to access the Review Manager module can be invited as either guest, reviewer, or owner. For more information about the various roles, please refer to *Roles* on page 10.

Prerequisite

You must have created a review; see *Creating a review* on page 29.

Invite a participant

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click the 👥 icon in the left area.

   The participant area is displayed.

3. Optional: Invite users as owners to the review:

   a. Click the 🖼 icon.

      The *Invite user* dialog box opens.

   b. Enter the name of the first user.

      Typing the first few letters opens a list of suggested names.

     c. Select the relevant users.

     d. Repeat steps 2 and 3 until you have selected all of the required reviewers.

     e. In the *Role* field, select the entry *Owner*.

     f. Optional: enter a message for the owners.

     g. Click *Send*.

You have now invited the selected users to the review as owners.

4. Optional: Invite users as reviewers to the review:

     a. Click the icon.

        The *Invite user* dialog box opens.

     b. Enter the name of the first user.

        Typing the first few letters opens a list of suggested names.

     c. Select the relevant users.

     d. Repeat steps 2 and 3 until you have selected all of the required reviewers.

     e. Make sure that the *Role* field contains *Reviewer*.

     f. Optional: enter a message for the reviewers.

     g. Click *Send*.

You have now invited the selected users to the review as reviewers.

5. Optional: Invite users as guests to the review:

     a. Click the icon.

        The *Invite user* dialog box opens.

     b. Enter the name of the first user.

        Typing the first few letters opens a list of suggested names.

     c. Select the relevant users.

     d. Repeat steps b and c until you have selected all of the required guests.

     e. In the *Role* field, select the entry *Guest*.

     f. Optional: enter a message for the guests.

     g. Click *Send*.

You have now invited the selected users to the review as guests.

You have now invited the required participants to the review. The participants will be informed by e-mail that they have been invited.

Next Step

In the next step, you can enter a review or edit a review that you entered when you created the review (see *Edit the briefing* on page 38). If you do not want to enter or edit everything, the review will start and can be edited. For more information, refer to *Edit review* on the next page.

3.2 Edit review

The process of editing a review involves a variety of tasks which come under the following areas:

Searching for and opening a review

- *Search for a review* on the facing page

- *Open a review* on page 37

Provide information about the review

- *Read a briefing in the review editor* on page 38: If participants are invited to the review, the briefing is part of the e-mail invite. This section shows how to open the briefing in the review editor. This can be useful if you want to review the details of the briefing.

- *Edit the briefing* on page 38: The briefing allows you to provide participants with information about the purpose of the review. If you do not enter any text when creating the review, a generic default text will be displayed. This section covers how to edit the briefing at a later point.

- *Send message to owners* on page 39: Reviewers and guests are able to send e-mails to the owners. This can be useful if there is a need to clarify any uncertainties.

- *Send message to reviewers and guests* on page 40: The owners are able to send a message to some or all participants by e-mail.

- *View progress* on page 41: Detailed feedback is available at several points so that you can check the progress of the review..

- *Open asset details* on page 42: It is possible to view the details for the assets stored in the *Media Pool* module.

- *Downloading an asset* on page 42: Files can be downloaded to make revisions or for other purposes.

Check asset

- *Comment on and mark assets* on page 43: When checking an asset, you can mark and comment on areas which need to be improved.

- *Compare iterations* on page 45: If two or more iterations are gone through during a review, you can compare the assets from the iterations.

- *Change iteration* on page 46: If you do not compare the iterations but would like to view the data of an older iteration, you can change the iteration. This will open the older iteration in view only mode. The current iteration will remain the active version which forms the basis for the review.

- *Change my comments and markings* on page 46: This section covers how you can add or edit feedback.

- *Delete own comments and markings* on page 48: This section covers how to delete your comments and markings.

- *Download comments and markings* on page 49: You can download comments and markings if you want to use them outside of the system.

Administrate

- *Remove a participant from the review* on page 49: This section covers how to remove a participant from a review.

- *Request a new iteration* on page 50: Once you have received sufficient feedback, you can request a new iteration as the owner so that work can begin on revising the asset.

- *Upload new iteration* on page 51: Once the changes have been incorporated in a new version of the asset, the uploader or the owner must upload the asset. The review can then be processed by the participants in the new iteration.

3.2.1   Searching for and opening a review

- *Search for a review* below
- *Open a review* on page 37

3.2.1.1   Search for a review

Click Review Manager to open the start page of the module.
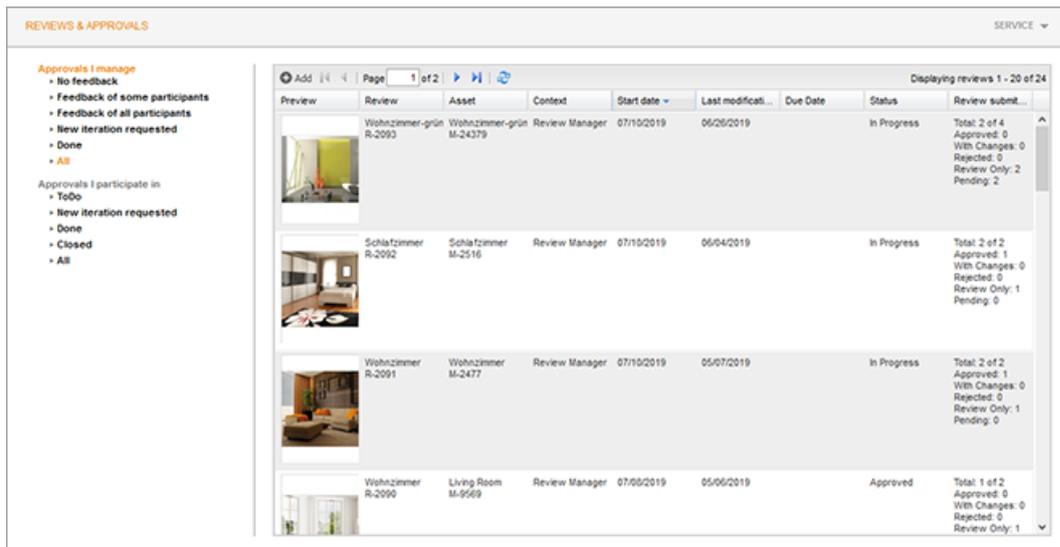
The table contains all of the reviews for which you are the owner, regardless of their status. You can tailor the view using the filters to the left of the table:

Area *My reviews*

This area shows the reviews where the user is the owner. You can use the filters to only show reviews which match the following description:

Filter	Description
No feedback yet	Reviews which are *in progress* and for which no reviewer has issued a decision
Feedback incomplete	Reviews which are *in progress* and where at least one of the reviewers has issued a decision
Feedback complete	Reviews which are *in progress* and for which all reviewers have issued a decision
Iteration requested	Reviews with state *Iteration requested*
Done	Reviews with a state of *Approved*, *Rejected* or *Context complete*
All	All reviews belonging to the owner

Area *Participation in reviews*

This area shows the reviews where the user is the guest, reviewer or uploader. You can use the filters to only show reviews which match the following description:

Filter	Description
ToDo	Reviews with a state of *In progress*, where the user is the guest or reviewer and has yet to issue a decision or make a comment.
New iteration requested	Reviews with a state of *Iteration requested*, where the user is the uploader
Done	Reviews with a state of *In progress*, where the user is the guest or reviewer and has completed their review.
Completed	Reviews with a state of *Approved*, *Rejected* or *Context complete*, where the user is the guest or reviewer
All	All reviews were the user is the guest or reviewer

3.2.1.2 Open a review

To open a review, click the line of the relevant review (the preview image, for example) in the table on the Home Screen. If you received an e-mail about the review, you can open it by clicking *Display review* in the e-mail. Both methods will open the review in the review editor.

3.2.2 Provide information about the review

- *Read a briefing in the review editor* on the next page: If participants are invited to the review, the briefing is part of the e-mail invite. This section shows how to open the briefing in the review editor. This can be useful if you want to review the details of the briefing.

- *Edit the briefing* on the next page: The briefing allows you to provide participants with information about the purpose of the review. If you do not enter any text when creating the review, a generic default text will be displayed. This section covers how to edit the briefing at a later point.

- *Send message to owners* on page 39: Reviewers and guests are able to send e-mails to the owners.This can be useful if there is a need to clarify any uncertainties.

- *Send message to reviewers and guests* on page 40: The owners are able to send a message to some or all participants by e-mail.

- *View progress* on page 41: Detailed feedback is available at several points so that you can check the progress of the review.

- *Open asset details* on page 42: It is possible to view the details for the assets stored in the *Media Pool* module.

- *Downloading an asset* on page 42: Files can be downloaded to make revisions or for other purposes.

3.2.2.1 Read a briefing in the review editor

If participants are invited to the review, the briefing is part of the e-mail invite. This section shows how to open the briefing in the review editor. This can be useful if you want to review the details of the briefing.

Role

Function	Owner	Reviewer	Guest	Uploader
Read a briefing	✓	✓	✓	✗

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on the previous page.

2. Click *Briefing* in the right area.

   The first few lines of the briefing will be displayed.

3. Click .

The briefing will be displayed in a dialog box.

3.2.2.2 Edit the briefing

The briefing allows you to provide participants with information about the purpose of the review. If you do not enter any text when creating the review, a generic default text will be displayed.

Roles

Function	Owner	Reviewer	Gast	Uploader
Create and edit a briefing	✓	✗	✗	✗

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on the previous page.

2. Click *Briefing* in the right area.

If you entered a briefing when creating the review, this text will be displayed. If you did not enter a briefing, a default text will be displayed.

3. Click the icon ✎ above the briefing text.

   The text will be opened in the briefing editor.

4. Use the *Briefing* field to document any details which may be important for participants. Use the formatting functions while doing so. You can display the names of the functions if you hover over the buttons.

5. Optional: enter a due date if the review needs to be finished by a specific date.

6. Optional: change the name of the review.

7. Click *Save*.

You have changed the briefing. All participants will be notified by e-mail of the change.

3.2.2.3 Send message to owners

Reviewers and guests are able to send e-mails to the owners. This can be useful if there is a need to clarify any uncertainties.

Roles

Function	Owner	Reviewer	Guest	Uploader
Send a message to owners	—	✓	✓	✗

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click the icon 👥 in the left area.

   The Participants area is displayed.

3. Click ✉.

   The *Send message* dialog box opens. The owners are already entered as recipient.

4. Enter a subject and a message.

5. Click *Send*.

The message is e-mailed to the owner of the review.

3.2.2.4 Send message to reviewers and guests

The owners can send messages to participants in a number of different ways:

- By sending a reminder e-mail to all or some reviewers
- By sending a message to all or some reviewers and guests

Roles

Function	Owner	Reviewer	Guest	Uploader
Send message to reviewers and guests	✓	✗	✗	✗

Send reminder e-mail

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click the icon ⬚ in the left area.

   The Participants area is displayed.

3. Click ⬚.

   The *Send message* dialog box is opened. All reviewers are entered as recipients.

4. If you do not want to send the message to all reviewers, check the list of recipients to see if you need to remove anybody.

5. Enter a subject and a message.

6. Click *Send*.

The message is sent to all reviewers that have been entered.

Send message to some or all reviewers and guests

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click the icon ⬚ in the left area.

   The Participants area is displayed.

3. Click ⬚.

The *Send message* dialog box is opened. All guests and reviewers are entered as recipients.

4. If you do not want to send the message to all reviewers and guests, check the list of recipients to see if you need to remove anybody.

5. Enter a subject and a message.

6. Click *Send*.

The message is sent to all users which have been entered.

3.2.2.5 View progress

Detailed feedback about decisions is available at several points so that you can check the progress of the review:

- In the Review Editor; refer to the following section *View progress in the Review Editor*.

- In the tables on the start page of the Review Manager module; refer to the section *Homepage* on page 21.

Roles

Function	Owner	Reviewer	Guest	Uploader
View progress	✓	✓	✓	✗

Information contained

The progress contains the following information:

Information	Description
Approved	This indicates how many reviewers have approved the review.
With changes	Note: only visible if the option to approve a review with changes is enabled.. The number indicates how many reviewers have approved the review with changes.
Rejected	This indicates how many reviewers have rejected the review.
Pending	This indicates how many reviewers have yet to issue a decision.

When a participant views the progress, the line allocated to the participant is highlighted in bold, and *(incl. you)* is added.

View progress in the Review Editor

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click *Progress* in the right-hand area.

The first few lines of the briefing is displayed.

3.2.2.6 Open asset details

There may be an occasion where you want to view the properties of the asset.

> **Note**
>
> Please note that the properties of assets which have uploaded for a review will not be complete. They will only be complete once the asset properties have been entered in the Media Pool. The asset will also be available in the Media Pool from that point onwards.

Roles

Function	Owner	Reviewer	Guest	Uploader
Open asset details	✓	✓	✓	✓

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click the icon ☰ in the left area.

   This will display the notification area.

3. Click *Detailed view*.

The detailed view will open in a different window.

3.2.2.7 Downloading an asset

Files can be downloaded to make revisions or for other purposes.

Roles

Function	Owner	Reviewer	Guest	Uploader
Downloading an asset	✓	✓	✓	✓

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click the icon ☰ in the left area.

   The notification area is displayed.

3. Click *Download document*.

The download dialog opens.

3.2.3   Check asset

- *Comment on and mark assets* below: When checking an asset, you can mark and comment on areas which need to be improved.

- *Compare iterations* on page 45: If two or more iterations are gone through during a review, you can compare the assets from the iterations.

- *Change iteration* on page 46: If you do not compare the iterations but would like to view the data of an older iteration, you can change the iteration. This will open the older iteration in view only mode. The current iteration will remain the active version which forms the basis for the review.

- *Change my comments and markings* on page 46: This section covers how you can add or edit feedback.

- *Delete own comments and markings* on page 48: This section covers how to delete your comments and markings.

- *Download comments and markings* on page 49: You can download comments and markings if you want to use them outside of the system.

3.2.3.1   Comment on and mark assets

When checking an asset, you can mark and comment on areas which need to be improved.

Roles

Function	Owner	Reviewer	Guest	Uploader
Check asset: create comments and markings	✓	✓	✓	✗

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click the icon 💬 in the left area.

   The Comments area is displayed.

3. Check the asset and provide feedback:

   - Add a comment:

     a. Choose 💬.

        A speech bubble is displayed at the cursor.

     b. Click on the section of the asset which you would like to comment on.

        The comment icon is inserted in the relevant position. A new note is opened on the right side.

     c. Enter your comment.

     d. Click *Add note*.

     You have now added a comment.

   - Adding a marking

     a. Click one of the symbols □ ○ ╱ ↗ ✎ ∫ depending on the form in which you would like to add the marking.

     b. Select a colour from the colour wheel.

     c. Click on the left at the top of the asset area which you would like to mark, and hold the mouse button down. Drag your cursor until the shape covers the desired area. Release the mouse button.

     You have now added the marking to the desired area.

4. Repeat step 3 until all feedback has been incorporated.

5. If the document contains multiple pages:

   1. Change the page. Use the page selector above the view or click the icon 🗐 to the left to bring up an overview of the pages with preview

images.

2. Check all of the pages in the document.

You have now checked the asset and provided your feedback.

3.2.3.2 Compare iterations

If two or more iterations are gone through during a review, you can compare the assets from the iterations.

You can also enter markings and comments and send messages when comparing two iterations. However, these options are only available for the current iteration.

Roles

Function	Owner	Reviewer	Guest	Uploader
Compare iterations	✓	✓	✓	✓

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click the icon [≡] in the left area.

   This will display the Actions area.

3. Click *Compare iterations*.

   A list of all iterations will be displayed.

4. Select the iteration which you would like to compare with the current iteration.

   The assets of the selected iteration and the open iteration will be displayed side-by-side.

5. Compare the iterations and enter your feedback. Please note that, depending on your role, you will only be able to enter comments and markings and send messages for the current iteration. These areas will not be available for older iterations.

You have now compared the iterations and entered your feedback.

> Note
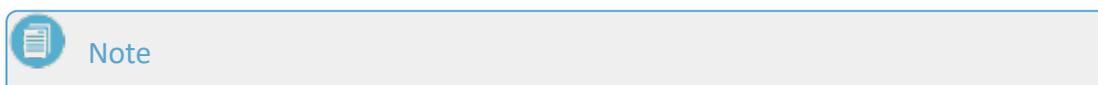
To exit the comparison and return to the individual display, click > ☰ >
Close this iteration for the iteration which you would like to close.

3.2.3.3 Change iteration

If you do not compare the iterations but would like to view the data of an older
iteration, you can change the iteration. This will open the older iteration in view
only mode. The current iteration will remain the active version which forms the
basis for the review.

Roles

Function	Owner	Reviewer	Guest	Uploader
Change iteration	✓	✓	✓	✓

1. Search for and open the review; see *Search for a review* on page 35 and
   Open a review on page 37.

2. Click the icon ☰ in the left area.

   The Actions area is displayed.

3. Click *Change iteration*.

   A list of all iterations is displayed.

4. Select the iteration to which you would like to change.

The selected iteration is displayed.

Note

Please note that all functions available to your role are only available for
the current iteration.

3.2.3.4 Change my comments and markings

This section covers how you can add or edit feedback.

Note

Please note that if notes are added to initial comments all markings, only
the most recent change to these notes can be amended.

Roles

Function	Owner	Reviewer	Guest	Uploader
Change my comments and markings	✓	✓	✓	✘

Change note

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Search for the note which you would like to change in the area on the right-hand side.

3. Click the button with the relevant icon above the note. Please note that either a rectangle or an ellipse will be displayed for notes added to markings. A colored icon will be displayed for a note which is added to a comment.

4. Select *Edit note* in the context menu.

   The note is opened in edit mode.

5. Make your changes.

6. Click *Save*.

You have now changed your note.

> **Note**
>
> To make changes to a note which is added to a different note, select *Change most recent comment* in the context menu. Please note that only the most recent note can be changed.

Change the icon for a comment

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Search for the comment whose icon you would like to change in the area on the right-hand side.

3. Click the button with the relevant icon above the note.

4. Select the desired icon from the context menu.

The selected icon are displayed above the note.

Change marking

Please note that you can only change the size and colour of the marking. The shape of the marking cannot be changed.

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Search for the marking which you would like to change in the asset.

3. Click the marking.

4. The marking will be displayed in edit mode, and the color picker will be displayed in the area on the left-hand side.

5. Optional: Change the size of the marking. To do this, click one of the squares on the marking and drag it until the marking is the desired size.

6. Optional: Select a different color for the marking.

You have now changed the marking.

3.2.3.5 Delete own comments and markings

This section covers how to delete your comments and markings. Please note that any added annotation will also be deleted.

Roles

Function	Owner	Reviewer	Guest	Uploader
Delete their own comments and markings	✓	✓	✓	✗

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Search for the note which you would like to delete in the area on the right-hand side.

3. Click the button with the relevant icon above the note.

4. Select *Delete note* in the context menu.

   A confirmation prompt is displayed.

5. Click *Yes*.

The comment and the marking will be deleted along with the corresponding notes.

3.2.3.6   Download comments and markings

You can download comments and markings if you want to use them outside of the system.

Roles

Function	Owner	Reviewer	Guest	Uploader
Download comments and markings	✓	✓	✓	✗

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click the icon ▤ in the left area.

   This will display the notification area.

3. Click *Download comments*.

4. The data will be compiled in a PDF file. Your operating system might ask you if you want to open the file or save it.

5. Follow any instructions which may be described by your operating system.

You have now downloaded the comments and markings.

3.2.4   Administrate

- *Remove a participant from the review* below: This section covers how to remove a participant from a review.

- *Request a new iteration* on the next page: Once you have received sufficient feedback, you can request a new iteration as the owner so that work can begin on revising the asset.

- *Upload new iteration* on page 51: Once the changes have been incorporated, the uploader or an owner must upload the asset for the new iteration. The review can then be processed by the participants in the new iteration.

3.2.4.1   Remove a participant from the review

This section covers how to remove a participant from a review.

Roles

Function	Owner	Reviewer	Guest	Uploader
Remove a participant from the review	✓	✗	✗	✗

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click the icon ![icon] in the left area.

   This will display the Participants area. The list includes all invited participants.

3. Click > ![gear icon] > *Remove user from review* next to the participant you would like to remove.

The user will be removed from the review. The user will be informed that they have been removed by e-mail.

3.2.4.2 Request a new iteration

Once you have received sufficient feedback, you can request a new iteration as the owner so that work can begin on revising the asset.

Roles

Function	Owner	Reviewer	Guest	Uploader
Request a new iteration	✓	✗	✗	✗

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click *Request new iteration* in the upper area.

   This will display the *Request new iteration for...* dialog.

3. In the *Responsible for new iteration* field, set a user as an uploader. The asset owner is preselected regardless of whether the asset owner is already participating in the review. You can change this preselection.

4. Optional: Enter a due date for the revision in the *Deliver new iteration by* field.

5. In the *Why are you requesting the new iteration?* field, enter detailed information for the uploader.

6. Optional: In the table, select the messages which the uploader will see and which messages the uploader should take into consideration for the purpose of the revision:

    1. Check the checkbox in the *Required* column for comments which must be incorporated.

    2. Unselect the checkboxes in the *Display* column for comments that the uploader should not receive as information.

7. Click *Request new iteration*.

You have now requested a new iteration of the review. The status of the review is now "Iteration requested". All participants will be informed by e-mail. The uploader will also be informed of the request to revise the asset for a new iteration.

3.2.4.3 Upload new iteration

Once the changes have been incorporated, the uploader or an owner must upload the asset for the new iteration. The review can then be processed by the participants in the new iteration.

Roles

Function	Owner	Reviewer	Guest	Uploader
Upload new iteration	✓	✗	✗	✓

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Click *Upload new iteration* in the upper area.

    The *Begin new iteration* dialog box is displayed.

3. Click *Select asset*.

    The dialog box for importing an asset or selecting an asset from the Media Pool is displayed.

4. Upload an asset or select the asset from the Media Pool. For more information, please refer to *Creating a review* on page 29.

5. Enter detailed information for the participants of the review in the edit box.

6. Click *OK*.

You have now uploaded the iteration. The status of the review is *In progress*. The participants are informed by e-mail that the iteration has been uploaded.

3.3 Complete review

When you complete a review, you either approve or reject the asset.
If you are a reviewer, you may be able to approve the asset with changes. This means that you approve the asset under the condition that certain changes are made.
Please note that the decision of a reviewer has no impact on the status of the review. The review is only completed on the basis of the decision of the owner, who assigns the review a status of *Rejected* or *Approved*.

> 📄 **Note**
>
> Please note that completing a review does not automatically cause the asset to be available to all users in the *Media Pool* module.

Roles

Function	Owner	Reviewer	Guest	Uploader
Approve and reject	✓	✓	✗	✗

1. Search for and open the review; see *Search for a review* on page 35 and *Open a review* on page 37.

2. Now it's time for you to decide.

   - If you would like to approve the asset, click *Approval*.

   - If available: Click *Approval with changes* if you would like to approve the asset under the condition that changes are made.

   - Click *Reject* to reject the asset.

   A dialog box opens.

3. Provide a reason for your decision.

   If available: The function *Secure reviews* may be enabled. If this is the case, a legal notice is displayed beneath the justification and you are asked for a password.

   1. Make sure that the checkbox has been selected.

   2. Enter your password.

4. Click *OK*.

You have submitted your decision on the review and thus completed the review.
If you are the owner of the asset, the review is now finished.

Administration 4

The chapter describes how to administer the Review Manager module.

- *Rights* on the facing page: This section describes the rights of the Review Manager module.

- *System Settings* on page 58: This section explains the system settings of the Review Manager module.

4.1 Rights

Designation	Description
MODULE_ ACCESS	The user can call up the module, create reviews and manage them as owner. In addition, the user can be invited to a review as owner, reviewer and guest as well as upload a new iteration as uploader.
ACT_LIKE_ OWNER	The user can access all reviews and administer them in the same way as their actual owners.
DELETE_ALL_ BULLETS	The user can delete a bullet point, including all of its comments.

With these rights, reviews can be created and carried out for files that are loaded via URL, imported directly or stored in a user collection in the *Media Pool* module.

To create a review for an asset, an owner needs a role in the *Media Pool* module with at least the following rights:

- MODULE_ACCESS
- Access rights to the asset, e.g. SEE_OWN_ORG or SEE_ANY_MEDIA

Reviewers and guests can participate in the review without these rights.

In order to be able to download the file to be reviewed, the user's role must also be assigned a DOWNLOAD right in the *Media Pool* module, for example DOWNLOAD_MEDIA.

4.2   System Settings

Name	Description
Approval via password entry	Turn the signing via password entry of review approvals on or off.
Decision "Approval with changes"	Enables and disables the option to approve a review with changes.