

Uptempo GmbH

Review Manager User Manual

Version 7.4



EN

September 04, 2023

10110000002

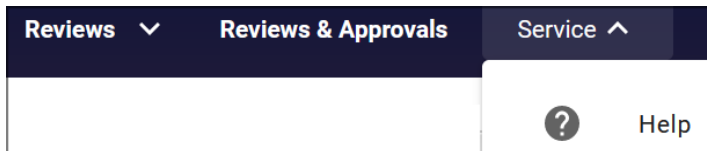
Copyright

Specifications and data contained in this document are subject to change without prior notice. The names and data used in the examples are fictitious unless stated otherwise. All brands mentioned are the sole property of their respective owners. No part of this document may be reproduced or made available for any purpose and in any way by whatever means, be it electronically or mechanically, without the express written permission of Uptempo GmbH.

Copyright 2023. Uptempo GmbH. All rights reserved.

Uptempo GmbH
An der Raumfabrik
Amalienbadstraße 41a
76227 Karlsruhe, DEUTSCHLAND
+49 721 97791-000

You can always access the latest version of this manual as online help by navigating to *>Reviews > Service > Help*:



Your feedback is important to us!

We would appreciate it if you could notify us of any errors you may find. Just send us an e-mail to documentation@brandmaker.com.

CONTENTS

1 Introduction	7
1.1 Basics	9
1.1.1 The Review Process	9
1.1.2 Roles	10
1.1.3 Approvals and Voting	14
1.1.4 Supported File Formats	14
1.2 More documentation	17
1.3 Style Conventions	18
2 Structure	19
2.1 Start Page	21
2.2 Review Editor	23
3 Process	29
3.1 Start Review	31
3.1.1 Create Review	31

3.1.2	Invite Participants	35
3.2	Review Process	38
3.2.1	Search and Open a Review	39
3.2.1.1	Search for a Review	39
3.2.1.2	Open Review	41
3.2.2	Obtain Information about the Review	42
3.2.2.1	Read Briefing in Review Editor	43
3.2.2.2	Edit Briefing	43
3.2.2.3	Send Message to Other Participant	44
3.2.2.4	View Progress	46
3.2.2.5	View Asset Details	48
3.2.2.6	Download Asset	48
3.2.3	Review and Vote on Asset	49
3.2.3.1	Global Comments and Events	50
3.2.3.2	Annotation Tools	52
3.2.3.3	Mark Annotations	56
3.2.3.4	Comment and Mark Asset	56
3.2.3.5	Compare Versions	59
3.2.3.6	Switch to Version	60
3.2.3.7	@Mentions	61
3.2.3.8	Edit Own Comments and Markers	63
3.2.3.9	Delete Own Comments and Markers	65
3.2.3.10	Mark Annotation	66

3.2.3.11	Download Comments and Markers	67
3.2.3.12	Reviewing Videos	68
3.2.4	Manage a Review	70
3.2.4.1	Remove Participant from Review	70
3.2.4.2	Request a New Version	71
3.2.4.3	Uploading a New Version	72
3.3	Completion of the Review	73
4	App for iOS and Android	75
4.1	App for iOS and Android	77
4.2	Installation and Configuration	78
4.3	Mobile Reviews	81
5	Administration	85
5.1	Rights	87
5.2	System Settings	88
5.3	Custom Objects and Structures	89

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

Introduction

1

Review Manager allows you to vote on assets with your colleagues. These assets can be graphics, documents, videos, or web pages. Furthermore, digital proofing helps to reduce paper consumption and protect the environment. You can use the tools to correct and comment on a multi-page PDF document or a photo, just like you would on paper. Review participants can work concurrently, seeing new annotations and comments from other participants in the review editor in real time.

The Review Manager module enables both direct discussion within the review and, preferably, the owner's approval while taking into account participant feedback.

A review can be started in the Review Manager as well as via Job Manager, if the data sheet is configured accordingly and assets can be added.



Note Not all standard languages can display all of the new interface. When this occurs, English is always used as a fallback language (en-US).

Objectives of this Documentation

This documentation primarily informs you about creating and editing reviews. It addresses users who are either owners or participants of a review. Owners start a review, participants are users who comment on the asset to be reviewed, submit change requests and vote on its approval.

The last section describes which functions are managed by an administrator. This covers the assignment of rights, individual adjustments and the activation of functions in the system settings.

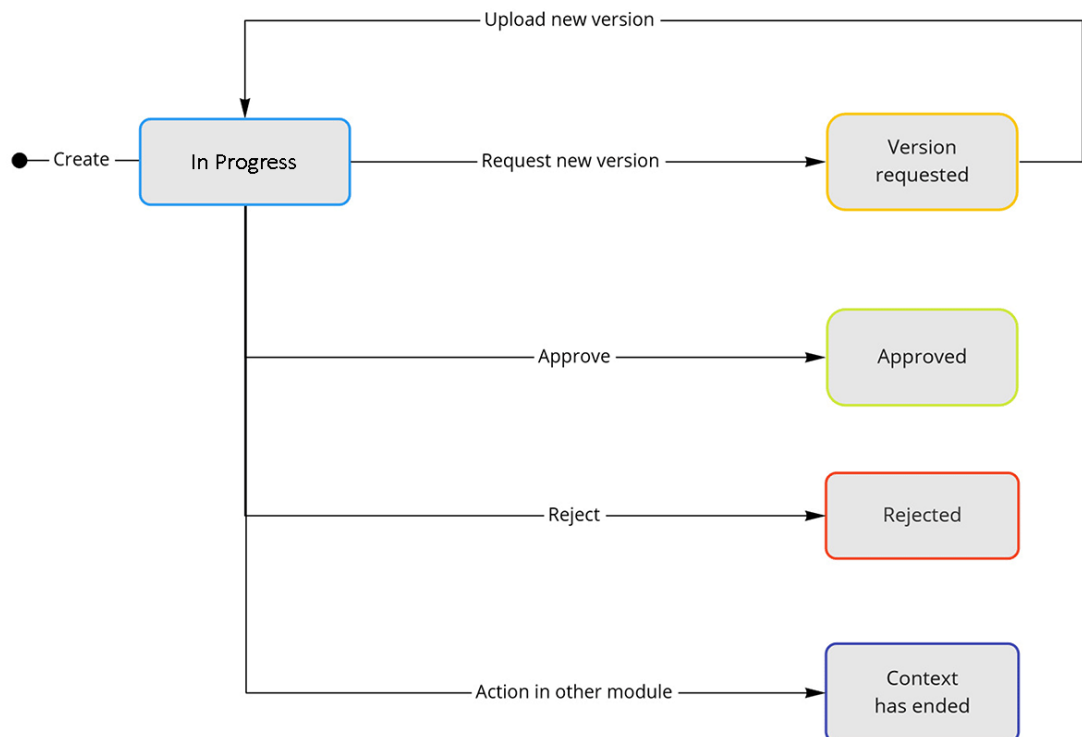
1.1 Basics

This section explains the following, basic topics:

- [The Review Process below](#)
- [Roles on the next page](#)
- [Approvals and Voting on page 14](#)
- [Supported File Formats on page 14](#)

1.1.1 The Review Process

Reviews are processed in a so-called finite-state machine, as shown in the following diagram:



After creation, the review has the status *In Progress*. In this state, owners, reviewers, and guests can both view and annotate the asset. If an owner decides that a new asset is needed for the review, for example, with the feedback being incorporated, the owner requests a new version. When this occurs, an uploader is assigned to revise the asset. Until the revised asset is uploaded, the review

remains in the *New version requested* status. After the revised asset has been uploaded by the uploader or the owner, the review reverts to the status *In progress*. For more information on the different roles, see section [Roles below](#).

By requesting a new version, an asset can be adapted step by step in the course of a review and can thus be adapted to satisfy all parties involved. The module Review Manager offers the possibility to show completed versions and to compare two versions with each other at any time. An arbitrary number of versions can be processed within a review.

A review can be terminated by three actions:

- The review is approved by an owner. This ends the review with the status *Approved*.
- The review is aborted by an owner. This ends the review with the status *Canceled*.
- The context when the review was created is no longer existent. For example, a context is a job where the review was started. This ends the review with the status *Context ended*.

1.1.2 Roles

The module Review Manager distinguishes between the roles of owner, reviewer, guest and uploader.

Owner

The user who started the review is automatically the owner of the review. Own reviews are listed on the Review Manager start page under *Approvals I manage*. Associated with this role is the creation of the briefing and the invitation of participants. In addition, the owner may request new versions.

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

Reviewer

Reviewers are participants who are invited to the review by the owner as reviewers. Reviewers can comment on the asset and cast their vote on whether the asset is approved. Reviews to be processed are listed on the start page under *Approvals I participate in*.

Guest

Guests are those participants who have been invited to the review by the owner as a guest. Guests can comment, but have no right to vote. That is, they can submit their opinions and wishes only in the form of a comment, but can neither accept nor reject like regular reviewers. Therefore, they do not appear in the voting overview. Reviews in which the guest participates are listed on the start page under *Approvals I participate in*.

Uploader

When requesting a new version, the owner selects a user to deliver the revised asset as an uploader. The uploader can view the review, download the asset, and upload the revised asset. The uploader can find that review on the start page under *Approvals I participate in > New version requested*.

Editing Capabilities of the Roles



Note

The table below shows the editing options for the current version when it is in progress and not yet released. Only the basic right `MODULE_ACCESS` has been assigned to the user role.

Function	Owner	Reviewer	Guest	Uploader
Open review	✓	✓	✓	✓
Detail view in review editor	✓	✓	✓	✓
Downloading the asset	✓	✓	✓	✓
Download review with comments	✓	✓	✓	✓
Request new version	✓	✗	✗	✗
Upload new version	✓	✗	✗	✓
Compare versions and switch to version	✓	✓	✓	✓
Edit briefing	✓	✗	✗	✗
Edit due date	✓	✗	✗	✗
Edit review title	✓	✗	✗	✗
Comment on Notes in annotations	✓	✓	✓	✓

1 Introduction

Function	Owner	Reviewer	Guest	Uploader
Review participants visible	✓	✓	✓	✓
Reject/approve review	✓	✗	✗	✗
Open asset details	✓	✓	✓	✓
Review progress is visible (traffic lights)	✓	✓	✓	✓
Buttons for voting are visible	✓	✓	✗	✗



Note

The table below adds further information options for the current version if the ACCESS_GENERAL right is assigned.

Function	Owner	Reviewer	Guest	Uploader
Tab <i>General</i> is visible.	✓	✓	✓	✓
Version information is visible	✓	✓	✓	✓
Review information is visible	✓	✓	✓	✓
Participants in this version are visible	✓	✓	✓	✓
Version history overview is visible	✓	✓	✓	✓



Note

The table below adds further editing options for the current version if the MANAGE_PARTICIPANTS right is also assigned.

Function	Owner	Reviewer	Guest	Uploader
Send message (e-mail)	✓	✓	✓	✓
Invite participants	✓	✓	✓	✓
Remove participants	✓	✓	✓	✓
Change participant role to (reviewer, owner, guest)	✓	✓	✓	✓

**Note**

The table below adds further editing options for the current version if the SEE_GLOBAL_COMMENTS right is also assigned.

Function	Owner	Reviewer	Guest	Uploader
Global comments and events are visible	✓	✓	✓	✓
Write global comments	✓	✓	✓	✓
Mention participants with @ in global comment	✓	✓	✓	✓
Mark as tagging for global comments	✓	✓	✓	✓

**Note**

The table below adds further editing options for the current version if the ADD_ANNOTATION right is also assigned.

Function	Owner	Reviewer	Guest	Uploader
Access to <i>Annotate</i> and <i>Shapes</i> in toolbar of Annotation tab	✓	✓	✓	✓
Create text annotations and shape markers	✓	✓	✓	✓
Mention participants in the annotation with @.	✓	✓	✓	✓
Flag annotations individually	✓	✓	✓	✓

Reviews that have been terminated or have had their context terminated can still be opened and viewed read-only. Different versions can still be compared with each other. It is not possible, however, to reactivate a canceled review and add new notes or comments. In the infobar, you'll also notice an editing lock symbol to the left of the review title.

1.1.3 Approvals and Voting

Your administrator can configure whether reviewers see two or three voting buttons. If this system setting is not enabled, only the *Reject version* and *Approve* buttons are available for review. If the option *Decision "Request changes"* to approve a review after changes is enabled in the system settings, reviewers will additionally see a third button, *Request changes*, for voting in the Review Editor. Owners have the *Abort review*, *Request new version* and *Accept* buttons instead to choose from.

Also note that the reviewers' decisions have no impact on the overall status of the review. They only serve as an advisory for the owner and are also displayed in a status traffic light. Only the owner's decision ends the review, either with the status *Canceled* or *Approved*.



Note

Terminated reviews cannot be reactivated for editing. You can open them read-only, to see annotations and comments, or compare versions.

1.1.4 Supported File Formats

Currently Review Manager supports the file formats, listed in the following table.

Graphic, Video, Audio and Document Formats

Format	Supported
PDF	✓
JPG/JPEG	✓
PNG	✓
MP4	✓
DOCX, DOTX, DOC	✓
PPTX, POTX, PPT	✓
XLSX, XLS	✓
WEBM	✓

Formats not officially supported by Review Manager

If an asset's existing format is not supported, that should be considered in advance and converted to a format supported by Review Manager. To do so, create variants in supported formats if the assets are intended for later review.



Note

Bitmap only files (BMP, GIF) have a fixed color palette, so the best choice for the variant in this case is a lossless and true-color bitmap format (PNG). Since PSD and TIF/TIFF tend to have very large file sizes, you can decide to convert these variants to the lossy but smaller JPEG format or save them as PNG. See the *Workaround for Review* column in the table.

If a new version is requested during the course of a review, uploaders of the new version should keep the file format used in the review.

Format	Supported	Workaround for Review
INDD	✗	Create PDF variant for review
IDML	✗	Create PDF variant for review
SVG	✗	Create PDF variant for review
AI	✗	Create PDF variant for review
EPS	✗	Create PDF variant for review
GIF	✗	Create PNG variant for review
WEBP	✗	Create JPEG variant for review
PSD	✗	Create JPEG variant for review
TIF/TIFF	✗	Create JPEG variant for review
BMP	✗	Create PNG variant for review
AVI	✗	Create MP4 variant for review
MPG	✗	Create MP4 variant for review
WMV	✗	Create MP4 variant for review
MP3	✗	Create MP4 variant for review
WAV	✗	Create MP4 variant for review

Websites



Note

Note that reviewing external websites is an option that is not enabled by default. This feature is currently in early beta. Please contact your BrandMaker contact person for availability.

1.2 More documentation

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

- [Media Pool User Manual 7.4](#)
- [Job Manager User Manual 7.4](#)

1.3 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.*

Structure

2

This chapter explains the structure of the module Review Manager. The module consists primarily of the following pages:

- *Start Page* on the facing page
- *Review Editor* on page 23
- *Annotation Tools* on page 52
- *Global Comments and Events* on page 50

2.1 Start Page

When you navigate > Reviews, the start page of the module is shown:

The screenshot shows the Review Manager interface. On the left, there are navigation menus for 'Approvals I manage' and 'Approvals I participate in'. The main area displays a table of reviews. The table has the following columns: Preview, Review, Asset, Kontext, Start date, Last modification date, Due Date, Status, and Review submitted. The data rows are as follows:

Preview	Review	Asset	Kontext	Start date	Last modification date	Due Date	Status	Review submitted
	IMG_4505_19682_0 R-23903	IMG_4505_19682_0 M-329	Reviews	11/07/2022	11/09/2022	11/16/2022	In Progress	Approved: 0 With Changes: 0 Rejected: 0 Pending: 0
	32-E R-22307	32-E M-60481	ME23 (J-15569-QA)	10/25/2022	10/25/2022		Cancelled	Approved: 0 With Changes: 0 Rejected: 0 Pending: 0
	3484_Andy_Warhol_an R-20631	3484_Andy_Warhol_an M-60930	ME23 (J-15569-QA)	10/14/2022	11/04/2022		In Progress	Approved: 1 With Changes: 0 Rejected: 0 Pending: 1
	Datashheet-headless-cm R-12984	censhare-datashheet-hee M-59530	Reviews	08/17/2022	11/09/2022	08/19/2022	Approved	Approved: 0 With Changes: 0 Rejected: 0 Pending: 3
	PXL_20220806_120117 R-12263	PXL_20220806_120117 M-59106	Pfingsten (J-12383-QA)	08/12/2022	09/12/2022		Context ended	Approved: 0 With Changes: 0 Rejected: 1 Pending: 2
	Overview+UI+Language: Outline Template (Micro R-11874	Overview+UI+Language: Outline Template (Micro M-59039	Reviews	08/08/2022	08/09/2022		In Progress	Approved: 0 With Changes: 0 Rejected: 0 Pending: 1
	Rakele Karte_Alschwal R-11874	Rakele Karte_Alschwal M-59039	Reviews	08/08/2022	11/09/2022	08/17/2022	In Progress	Approved: 1

The start page lists all reviews in which you are involved and which match the currently selected filter. The filters are shown on the left. By default, the first time you open it, all reviews you are the owner of are shown, regardless of the status of the reviews. If you want to see only reviews in which you are involved as a reviewer, please select the *Approvals I participate in* filter options.


You can find a detailed description of the available filters in [Search for a Review on page 39](#).

Table Structure

For a review, the following information is listed in the table columns:

Column	Description
Preview	Asset thumbnail image
Review	Review name and review ID
Asset	Asset name and asset ID
Kontext	Module in which the review was created, e.g. Review Manager, Job Manager. The context ID is provided in parentheses.

Column	Description
Start date	Creation date of the review
Last modification date	Date of last change made to the review
Due date	The date specified during creation, on which the review is to be completed
Status	Review status, see The Review Process on page 9
Review submitted	Review progress, see View Progress on page 46

Up to 20 reviews are shown in the table on a single page. If more reviews match the filter, use the navigation buttons above the table to scroll through the pages. Use the  button to refresh the view.

It is possible to drag the columns into the preferred order.

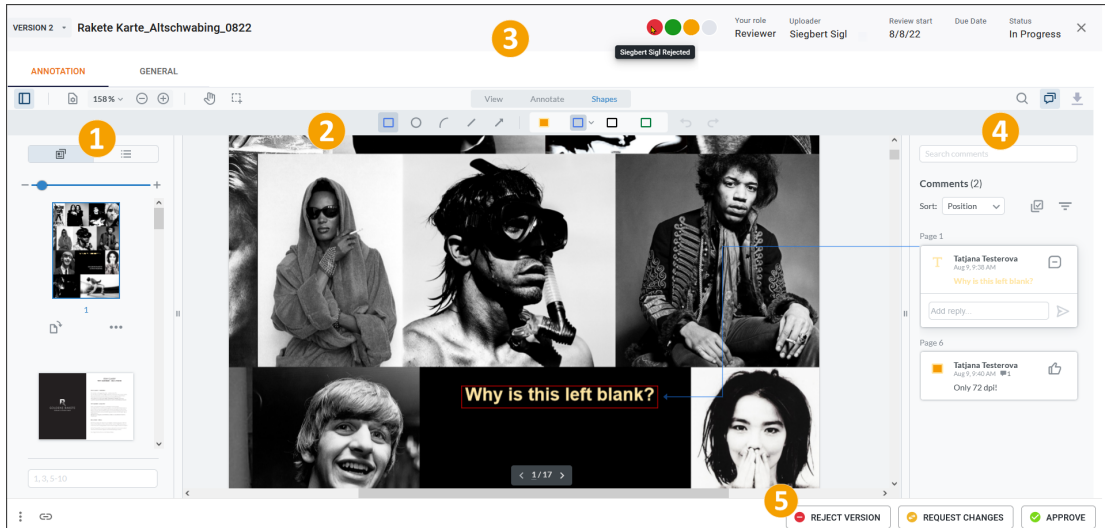
Related Tasks

- [Search for a Review on page 39](#)
- [Open Review on page 41](#)
- [Create Review on page 31](#)

2.2 Review Editor

In the Review Editor, you edit and finalize the review.




Annotation Tab

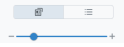
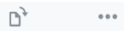



Below you will find the functions of the Review Editor under the *Annotation* tab.

1 Left Sidebar

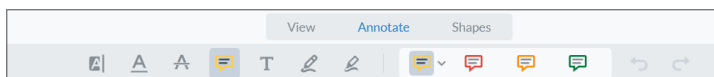
Use the left sidebar to access the following functions and areas:

Area	Description
	The sidebar can be shown or hidden with this button.
	Use the menu to set how multi-page documents are displayed. Use the menu to select a zoom factor up to 6400% or by manually entering a value up to 9999%. At the end of the menu, the <i>Marquee Zoom</i> function is available. If you select <i>Marque Zoom</i> and then drag a frame around an object with the mouse, the object will be zoomed to this frame. You can also use the <i>-/+</i> buttons to zoom in incrementally.
	Use the hand tool to move the screen section in all directions without using the scrollbars. The Selection tool lets you use your mouse pointer to draw a frame around multiple markers and annotations in a document to select them. This lets you annotate, adjust, or delete multiple elements at once. <ul style="list-style-type: none"> Comment and Mark Asset on page 56

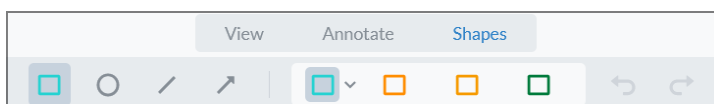
Area	Description
	Switch between thumbnail view and outline view. Use the slider or press -/+ to adjust the size of the page thumbnails.
	If you select a thumbnail, you can rotate the page view clockwise by 90° with the left tool. In the .. menu you will find an option to rotate counterclockwise. The text field below the thumbnail allows multiple selection of pages by typing page numbers, such as 1,5,7 or 8-10.
	In the ⋮ menu, you can reach the <i>Download media</i> , <i>Detailed view</i> and <i>Upload new version</i> commands, depending on your role. In addition, you can use the Link button to copy the link to the review as a special URL including the review ID to the clipboard.

2 Asset

The detailed view of the review editor takes up the majority of the screen. For images, a high-resolution preview image of the item is typically displayed. The asset is displayed in its original resolution for multi-page documents, such as PDF, or Office documents (DOCX, PPTX, XLSX) are reliably rendered using a specific engine. You can use the tools of the *Comment* tab to annotate and highlight text passages.



The shapes and freehand tools are suitable for visual markup in text, images, and videos.







Related tasks:

- [Annotation Tools on page 52](#)
- [Comment and Mark Asset on page 56](#)

3 Info Bar

In the upper row you can find information about the current version.

Areas	Description
Version x	By using the <i>Switch to version</i> feature, you can access an older version. Set the checkmark for two versions and click the <i>Compare</i> button to compare them side by side.
Name	Next to the version, the name of the asset to be reviewed is always displayed by default, and later replaced by the customized name of the review.
Right screen area	You can see how many reviewers there are overall and how many of them have already cast votes by looking at a row of traffic lights representing their decision. A reviewer is represented by each circle. The name of the reviewer and their choice will appear in a tooltip if you hover your mouse pointer over the circles. You can see your role in the review, the uploader's name, the start and due dates, and the review status next to the traffic lights.
   	<p>Has not yet voted.</p> <p>Reviewer has requested changes.</p> <p>Reviewer has approved.</p> <p>Reviewer has rejected.</p>
Close field X	You close the review.

Related tasks:

- [Switch to Version on page 60](#)
- [Compare Versions on page 59](#)

4 Annotations

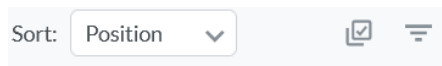
In the right sidebar you will find the annotations that are inserted with the comments and markers.




The three icons on top stand for search document content, show/hide comments sidebar and download the complete review of the current version as PDF with all comments.

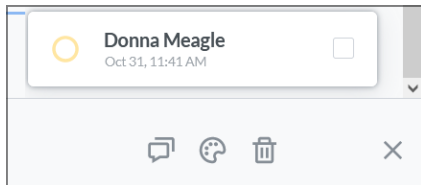
Sort and Filters

You can sort the annotations according to seven criteria. The default sorting is by the position of the markers in the document.



You can select multiple annotations at once. To do so, press  and then tick each comment you want to add to the selection.

After a multiple selection, the tool options are displayed below the comments list:



You can either comment annotations marked for selection all at once with the same comment, change their color and transparency all at once, or delete the entire multiple selection.

Clicking on the filter icon  opens the *Filters* settings dialog.

- In the *User* tab, select which users to show and whether to include replies in the result.
- In the *Color* tab, you can additionally filter by color. Select one or more annotation colors to hide the rest.
- In the *Type* tab you can filter the annotations by shape and annotation tool. Tick the annotation types that should remain visible.
- In the Status tab you can filter by *Accepted*, *None* or *Marked*. *None* stands for annotations without added text and *Marked* stands for annotations with comments.

The filters of all tabs combined represent the displayed result. With *Clear all* in the *Filters* settings dialog, the filters are reset.

In the *Search comments* text field above the comments you can filter the comments of all participants for specific content. The matches are highlighted in yellow.

Related tasks:

- [Edit Own Comments and Markers on page 63](#)
- [Delete Own Comments and Markers on page 65](#)

5 Voting

Reviewers generally have two options to vote on the review. These are the buttons *Reject version* and *Approve*. According to the color of the buttons, other participants will later see a filled circle in one of the colors in the info bar and under the *General* tab.

If the *Request changes* function has also been activated in the system settings, approval after changes is possible as a third option (yellow traffic light).



Related tasks:

- [Comment and Mark Asset on page 56](#)

General Tab

The screenshot displays the 'General' tab of a review. Key sections include:

- REVIEW INFORMATION (6):** Review name 'New Style Guide', creator 'Matthias Eckardt', due date '11/14/22', and briefing 'Please start soon!'.
- VERSION INFORMATION (7):** File name 'Styles V3.pdf', file type 'PDF', and asset size '31.17MB'.
- VERSION PARTICIPANTS (8):** A table listing participants: Frankie Brown (Reviewer), Elena Employee (Guest), Robert Reviewer (Reviewer), and Manfred Egan (Reviewer).
- VERSION OVERVIEW (9):** A table showing version history: Version 1 (Start date 9/12/22, Last activity 'The classification of a global comment has been changed a month ago.') and Version 2 (Start date 10/19/22, Last activity 'A new version has been requested a month ago.').
- COMMENTS AND EVENTS:** A sidebar on the right showing a list of activities such as 'Ron Swanson review started', 'Frankie Brown approved review Version 1', and 'Elena Employee rejected review Version 1'.

Below you will find the functions of the Review Editor under the *General* tab. Among other things, the review information, participants, version overview and global comments are located here. With the `ACCESS_GENERAL` right, the user is granted access to the *General* tab. If a participant does not have this right, the tab remains hidden.

6 Review Information

Related tasks:

- [Obtain Information about the Review on page 42](#)
- [Edit Briefing on page 43](#)
- [Read Briefing in Review Editor on page 43](#)

7 Version Informationen

This is where you will find the file name, file format and file size of the current version.

8 Version Participants

Related tasks:

- [Invite Participants on page 35](#)
- [Send Message to Other Participant on page 44](#)
- [Remove Participant from Review on page 70](#)

9 Version Overview

Related tasks:

- [View Progress on page 46](#)

10 Comments and Events

- [Global Comments and Events on page 50](#)

You can find, read and leave global comments here. Additionally, you can inform yourself about events in the course of the review. You will learn how to mark both your own comments and those of other participants in the chapter that is linked.

Process

3

The review process is divided into the following steps:

- [Start Review on the facing page](#)
- [Review Process on page 38](#)
- [Completion of the Review on page 73](#)



Note

Depending on their role in the Review Manager and the associated rights, participants may only have access to a limited range of functions. For more information, see [Roles on page 10](#) and in the Administration chapter under [Rights on page 87](#).

3.1 Start Review

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


- [Create Review below](#): This includes creating a review in the module Review Manager or from within a job.
- [Invite Participants on page 35](#): The owner invites other users to participate in the review as a reviewer or guest.

Next Step

After you start the review, the review is processed by you and the participants, see [Review Process on page 38](#).

3.1.1 Create Review

When you create a review, you select the asset to review. You have three options:

- You select a file that is already stored as an asset in Media Pool.
- You select a file that is stored in your file system. In this case, the file is uploaded and created as an asset and stored in Media Pool in the collection *My Reviews*. That asset is not available for other users via Media Pool search.
- You can attach files to adequately prepared jobs within a controlled workflow. Prerequisite: an administrator has prepared the job type accordingly for later reviews. For this purpose, a variable of the *Asset Selector* type must be provided on the datasheet of the type. For that purpose, the user also needs the MANAGE REVIEW right in the module Job Manager. Only then users can see the *Start Review* entry in the  asset menu in the Job Manager.

Create a Review for a Media Pool Asset

1. Navigate to *> Reviews*.
The *Reviews & Approvals* page is shown. The overview shows all reviews that you own and in which you participate as a guest, reviewer or uploader.
2. Click *Add* in the header of the overview page.
The selection dialog is opened.
3. Switch to the tab *Digital assets*.

4. Search for the asset you want to review. For more information on searching Media Pool, refer to the Media Pool user help, see [More documentation on page 17](#).
5. Click the plus icon on the asset.
The briefing editor opens.
6. Optional: Specify a due date if the review must be completed before a certain date.
7. Optional: Change the review name. By default, the asset name is applied.
8. Optional: In the *Briefing* field, enter any details that are important to the participants.
9. Press the *Start Review* button.

You have created the review. The review is opened in the review editor. You are the owner of the review and therefore responsible for the invitation of participants, the process and the final editing.

Create a Review for Own Asset

1. Navigate to > *Reviews*.
The *Reviews & Approvals* page is shown. The overview shows all reviews that you own and in which you participate as a guest, reviewer or uploader.
2. Click *Add* in the header of the overview page.
The selection dialog is opened.
3. Switch to the tab *Import* and click *Browse*.
The standard dialog of the operating system will open, allowing you to browse the file system and upload a file.
Optional: Drag-and-drop a local file into the dashed drop zone and proceed to step 6.
4. Select the desired file and click *Open*.
The briefing editor opens.
5. Optional: Specify a due date if the review must be completed before a certain date.
6. Optional: Change the review name. By default, the asset name is applied.
7. Optional: In the *Briefing* field, enter any details that are important to the participants.
8. Press the *Start Review* button.

You have created the review from a local file. The review is opened in the review editor.

You are the owner of the review and therefore responsible for the invitation of participants, the process and the final editing.

Create Review in a Job

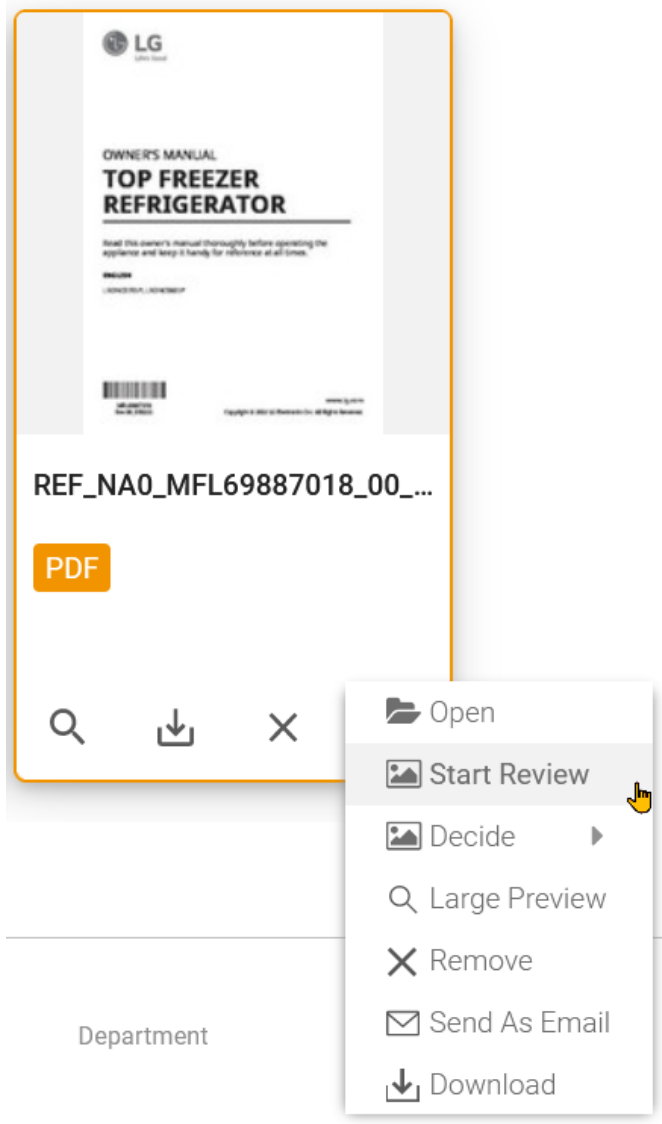
You need to have a Job type ready with the *Asset selector* variable placed in the datasheet. Create and open a job prepared for reviews in the Job Manager via *>Jobs > My Active Jobs (ToDos)*. If the job does not yet contain any assets to be reviewed, continue with step 2. Otherwise, skip directly to step 7.

1. In the datasheet, locate the *Add Asset* pop-up menu. Open the menu by clicking on the triangular arrow.

These options are available in the menu:

- a. *Upload new assets*
 - b. *Add from own collection*
 - c. *Select asset*
2. Select the option *Upload new assets*.
The file upload window opens. You can select either from existing assets or local files for upload.
 3. Click *Browse* and add one or more files from a local disk.
 4. Click *Start*, to proceed with the upload.
After the files are successfully uploaded, they appear as thumbnails on the datasheet.
 5. Save the changes in the datasheet.

6. To start the review, select *Start Review* from the  menu on the asset.



The review editor opens.

7. You initiate the review process by clicking the *General* tab and then perform the tasks [Edit Briefing on page 43](#) and [Invite Participants on the facing page](#).

The asset is stored in Media Pool in the *Own DSE pictures* collection. The asset is not available for other users via Media Pool search.

You are the owner of the review and therefore responsible for the invitation of participants, the process and the final editing.

Next Step

In the next step you add participants, see [Invite Participants on the facing page](#).

3.1.2 Invite Participants

In this stage, you invite other participants to a review. You have the option to invite other users with access rights to the module Review Manager either as Guest, Reviewer or Owner. For information about the different roles, see [Roles on page 10](#).

Prerequisite

You have successfully created a review, see [Create Review on page 31](#).

Add Participant

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. Navigate to *General* > *Version participants*. If the list of participants is not shown there, press the ^ arrow to expand the view for the area. The participant area is on display.
3. Optional: Invite more users to join the review as reviewer:
 - a. Press + **ADD PARTICIPANT**.
The *Add Participant* dialog opens.
 - b. Enter the name of the first user.
When you enter the first few letters, a suggestion list of matching users is displayed.
 - c. Select the desired user.
 - d. Repeat steps b and c until you have selected all required reviewers.
 - e. Make sure that *Reviewer* is selected in the *Role* field.

f. Optional: Enter a message for the reviewers.

Add Participant

User
Tatjana Testerova

Role
Reviewer

Optional Message
We have licensed this photo and ask for a short vote on the correct crop.

Sparse greetings,
Ron Swanson

CANCEL ADD

This message will also appear in the invitation e-mail to the review participants.

Action Required

Invited as Participant

You were invited to participate in a review. Please open the review and give your feedback.

Review Details

Owner	Ron Swanson
Review Name	IMG_4505_19682_0
Review ID	23903
Context	Reviews
Due Date	11/16/2022
Role	Reviewer

Briefing (of review)

Message
We have licensed this photo and ask for a short vote on the correct crop.

Sparse greetings,
Ron Swanson

SHOW REVIEW

This is an automatically generated e-mail - please do not reply. You can change your e-mail notification settings in your **user profile**.

powered by BrandMaker

Participants will be informed about the invitation via e-mail and can directly access the review via the button in the e-mail.

g. Press the *Add* button.

VERSION PARTICIPANTS					
				Role	Last activity
Tatjana Testerova dri	✓	✓		Reviewer	No activity yet.
Siegbert Sigl [redacted]	✓	✓		Reviewer	No activity yet.
Notburga Neidhart notburga	✓			Guest	No activity yet.

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

1. Optional: Invite more users to join the review as guest:

- a. Press + **ADD PARTICIPANT**.
- b. The *Add Participant* dialog opens.
- c. Enter the name of the first user.
When you enter the first few letters, a suggestion list of matching users is displayed.
- d. Select the desired user.
- e. Repeat steps b and c until you have selected all required guests.
- f. Make sure that *Guest* is selected in the *Role* field.
- g. Optional: Enter a message for the guests.
This message will also appear in the invitation e-mail to the guests in the review.
- h. Press the *Add* button.

You have invited selected users as guests to the review.

Participants will be informed about the invitation via e-mail and can directly access the review via the button in the e-mail. All required participants have been invited to the review.

See also adding participants via [@Mentions on page 61](#).

Next Step

In the next step, enter a briefing or adjust its text if necessary, if you have already entered the briefing while creating the review, see [Edit Briefing on page 43](#). If you do not enter a briefing, this field will also remain empty in the e-mail to the participants. The review has started and can be processed. For more information, please refer to [Review Process on the next page](#).

3.2 Review Process

During the review process, a variety of tasks arise that belong to the following areas of activity:

Search and Open a Review

- [Search for a Review on the facing page](#)
- [Open Review on page 41](#)

Obtain Information about the Review

- [Read Briefing in Review Editor on page 43](#): When participants are invited to the review, the briefing is part of the invitation e-mail. This chapter shows how the briefing can be called up again in the review editor, for example to check details.
- [Edit Briefing on page 43](#): With the briefing you inform the participants about the goal of the review. This section describes how you can edit the briefing afterwards.
- [Send Message to Other Participant on page 44](#): The owners and all users with the MANAGE_PARTICIPANTS right are able to directly send a message to other participants or to the owner via e-mail. This can be helpful, for example, for queries in case of ambiguities.
- [View Progress on page 46](#): To check how far the review has progressed, you have the opportunity to obtain detailed feedback at several places.
- [View Asset Details on page 48](#): If necessary, you also might be interested in viewing the details that are stored in the *Media Pool* module for the asset.
- [Download Asset on page 48](#): It may be necessary to download the file, for example to make a revision.

Check Asset and Vote

- [Comment and Mark Asset on page 56](#): As you review an asset, you identify and annotate elements and text that need to be refined.
- [Compare Versions on page 59](#): If two or more versions are run during a review, you have the option to compare the assets from the versions.
- [Switch to Version on page 60](#): You can switch to an older version if you don't want to compare the versions but want to view data in it. In this case, the older version is opened in read-only mode for viewing. The current version is the one in which the review is being worked on.

- [@Mentions on page 61](#): In this section you will learn how to comment and how to use *@mention* mentions.
- [Edit Own Comments and Markers on page 63](#): This section describes how to add or edit your feedback.
- [Delete Own Comments and Markers on page 65](#): This chapter explains how to delete your own annotations and markers if necessary.
- [Download Comments and Markers on page 67](#): If you want to share or use the comments and markers outside the system, download them.
- [Completion of the Review on page 73](#): After you annotated and marked the asset, you then vote on the asset.

Manage Review

- [Remove Participant from Review on page 70](#): This section describes how to remove participants from the review if needed.
- [Request a New Version on page 71](#): After you have received sufficient feedback, you want to start a revision of the asset. To do so, you request a new version as the owner.

Upload New Version

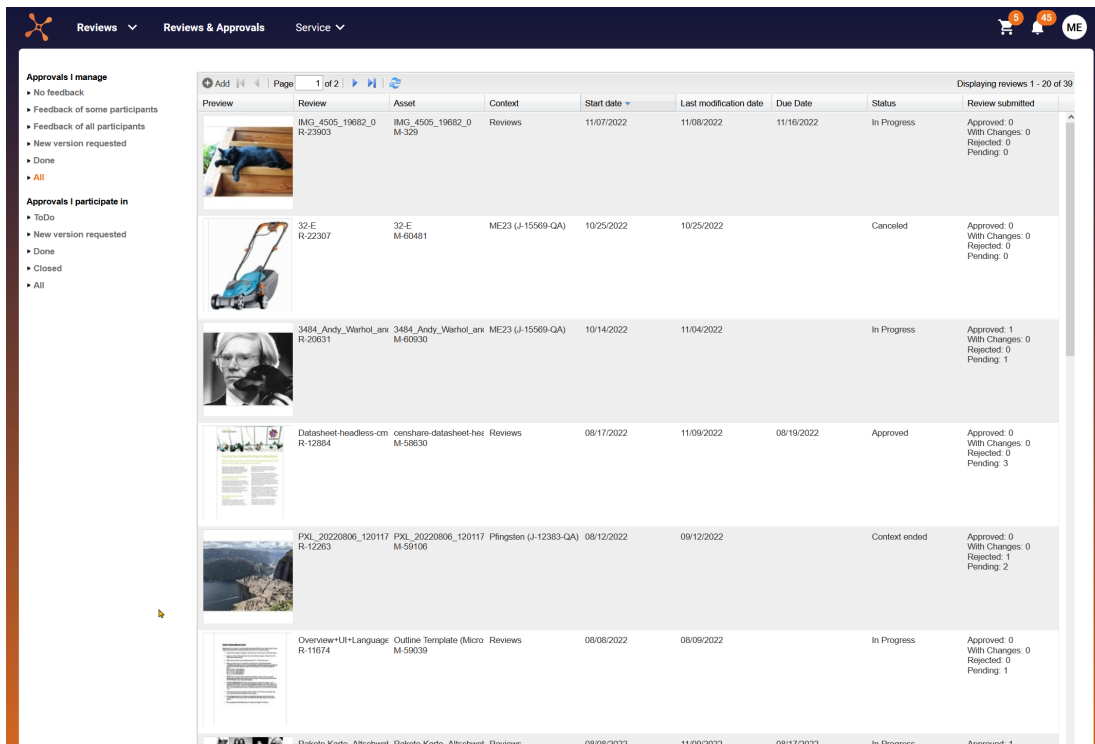
[Uploading a New Version on page 72](#): Once the changes are applied to a new version of the asset, the uploader or owner must upload the asset. After that, the review can be processed by the participants in the new version.

3.2.1 Search and Open a Review

- [Search for a Review below](#)
- [Open Review on page 41](#)

3.2.1.1 Search for a Review

If you click > *Reviews* in the main menu, the start page of the module will be opened:



By default, the table shows all reviews of which you are the owner, regardless of their status. You can further restrict the view using the filters on the left of the table:

Area Approvals I manage

This section shows the reviews for which the logged-in user is the owner. Use the filters to reduce the view to the reviews that match one of the following descriptions:

Filter	Description
No feedback	Reviews which are in progress but no reviewer has voted yet
Feedback of some participants	Reviews which are in progress and at least one participant has voted yet
Feedback of all participants	Reviews which are in progress , where all reviewers have voted on
New version requested	Reviews with state <i>New version requested</i> . Note: This filter applies only to the designated uploader, but it will be blank for all other participants.
Done	Reviews with state <i>Approved</i> , <i>Cancelled</i> or <i>Context ended</i>
All	All reviews belonging to you as owner

Area Approvals I participate in

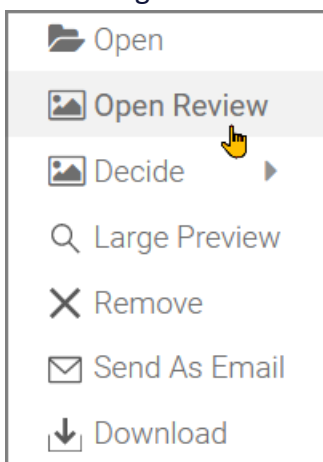
This section shows the reviews for which the logged-in user is guest, reviewer or uploader. Make use of the filters to limit the view to the reviews that match the following description:

Filter	Description
ToDo	Reviews which are in progress and where the user is a guest or reviewer but has not voted yet or submitted a comment.
New version requested	Reviews with state <i>New version requested</i> , where the user is designated uploader.
Done	Reviews with state <i>New version requested</i> . where the user is a guest or reviewer and has finished the review.
Closed	Reviews with state <i>Approved</i> , <i>Canceled</i> or <i>Context ended</i> where the user is a guest or reviewer and has finished the review.
All	All reviews where the user is a guest or reviewer.

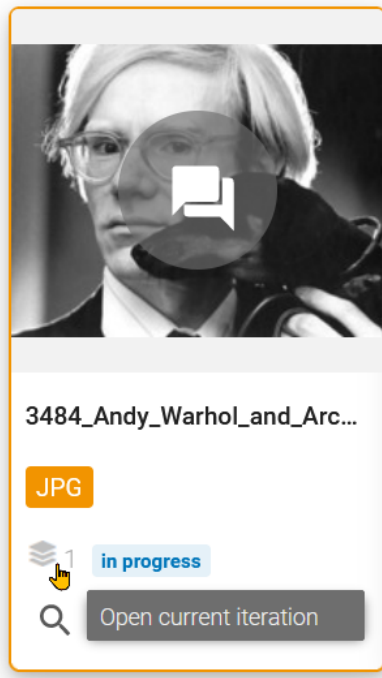
3.2.1.2 Open Review

In the overview table on the start page, navigate to the row of the desired review and select, for example, the preview image or review title to open this particular review. Alternatively, you can open a review by selecting the *Show Review* button in an e-mail you received ahead of the review. In both cases, the review editor opens with the review.

1. Reviews in a Job Manager data sheet can be opened using the **:** menu on the side of the asset. Users need a role with the **MANAGE REVIEW** right in Job Manager for this.



- Optional: Instead, click the icon with the stack of papers on the bottom left of the asset's tile. The number next to the icon stands for the current version number.



3.2.2 Obtain Information about the Review

- [Read Briefing in Review Editor on the facing page](#): When participants are invited to participate in the review, the briefing is included in the invitation e-mail. This chapter demonstrates how the briefing can be retrieved in the review editor, for example, to read details.
- [Edit Briefing on the facing page](#): The owner initially informs the participants of the review's objective with the briefing. How you, as owner, can edit the briefing is explained in this section.
- [Send Message to Other Participant on page 44](#): Participants have the possibility to contact other participants and the owner a message via e-mail or through a comment or annotation with @-Mention. This, for example, can be useful for further clarification in case of ambiguity.
- [View Progress on page 46](#): To check how far the review has progressed, you have the opportunity to receive detailed feedback at several points.
- [View Asset Details on page 48](#): You may want to view the details that are stored in the Media Pool module for the review asset.
- [Download Asset on page 48](#): It may be necessary to download the original file for modification.

3.2.2.1 Read Briefing in Review Editor

When participants are invited to the review, the briefing is always part of the invitation e-mail. This chapter shows how the briefing can be retrieved in the review editor, for example to read the details.

Role

Function	Owner	Reviewer	Guest	Uploader
Read briefing	✓	✓	✓	✗

1. Find and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. Navigate to **General > Review Information**. If the briefing is not shown here initially, press the ^ arrow to expand the display for the area.
The review information now shows the full content of the briefing.

3.2.2.2 Edit Briefing

With the briefing, the owner of a review informs the participants about the goal of the review. If you have not entered any text when creating the review, this can be done later in the opened review.

Rollen

Function	Owner	Reviewer	Guest	Uploader
Create and edit briefing	✓	✗	✗	✗

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. Navigate to **General > Review Information**. If the briefing is not shown here, press the ^ arrow to expand the view for the area.
3. If you entered a briefing when creating the review, that text will be shown. If you have not entered a briefing before, you can do so now or change the existing text.
4. Select the *Edit* button on the right inside the review information.
Select the text input field *Briefing*.
5. Enter all details there that are important for the participants.
6. Optional: Activate the *Due date* field. A calendar widget opens. Select an end date if the review must be completed by a certain date.

7. Optional: Change the review name.
8. Press the *Save* button.

You have changed the briefing. All participants will be informed about the change via e-mail.

3.2.2.3 Send Message to Other Participant

You have multiple ways to interact with the other participants in the review:

- Mention in a comment
- Mention in an annotation
- Send a message via e-mail to individual participants



Note: You can easily select existing and additional users with @ if you have the right to manage participants in the review. To do this, type some initial letters of the name after @ to narrow down the list of users. Only users who have appropriate rights to participate in reviews will appear in the selection list. If you have selected a user, this user will appear in the list of participants of the review with the role Reviewer after submitting the comment. The new participant receives an e-mail notification with the invitation to the review.

Roles

All users who have the MANAGE PARTICIPANTS right are allowed to send messages.

Function	Owner	Reviewer	Guest	Uploader
Send message to reviewers and guests as e-mail	✓	✓	✓	✓
Using @ mention in a comment	✓	✓	✓	✗
Using @ mention in an annotation	✓	✓	✓	✗

Reply to Comment

Users with the SEE_GLOBAL_COMMENTS right can see and write comments in the *General* tab. A message created like this is also visible to other participants of the review.

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. The review opens and shows the *Annotation* tab.
3. Switch to the *General* tab.
4. On the right sidebar, click in the text box below *Comments* and *Events*.
5. Type in @ directly or click the @ icon under the activated text field to see the list of participants.
6. Select one or more participants as addressees and write a comment.
7. Click on the *Send* icon (paper plane).

The comment will appear in the global comments and an e-mail notification will be sent to the selected participants.

Reply to Annotation Comment

Users with the ADD_ANNOTATION right can see and comment annotations in the *Annotation* tab. A message created in this way is visible to all participants in the review.

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. The review opens and shows the *Annotation* tab.
3. Either click on an annotation in the Review Editor on the asset or directly in the right sidebar.
4. A new comment field opens underneath.
5. Type @ in the field to view the list of participants.
6. Select one or more participants as addressees and write a comment to the selected annotation.
7. Press the *Save* button.

Your comment will appear under the annotation and an e-mail notification will be sent to the participants mentioned with @. Optionally, you can tag the annotation, see [Mark Annotation on page 66](#).

Send Message to Owners, Reviewers and Guests

It is sometimes necessary to send an e-mail to the owner. A direct e-mail message will not be as easily overlooked as one comment among many. This function can be used for ambiguity consultations, for example. The rights MODULE ACCESS RIGHTS, ACCESS GENERAL, and MANAGE PARTICIPANTS are required as a minimum for this.

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. The Review opens and shows the *Annotation* tab.
3. Navigate to the *General* tab.
Further down, the *Version Participants* section is shown on that page.
4. If you hover the mouse over a participant, three icons will appear in the same row behind the participant's name.
5. Click the envelope icon to compose a message to the designated participant.
The *Send message* dialog opens.
6. Enter a *Subject* and the text of your message.
7. Press the *Send* button.

The message will be sent to the participant's stored e-mail address.

See also [@Mentions on page 61](#) in global comments and annotations.

3.2.2.4 View Progress

To check how far the review has progressed, at several points you will have the opportunity to obtain detailed feedback on the decisions received:

- In the Review Editor; refer to the section below [View Progress in the Review Editor on the facing page](#).
- In the tables on the start page of the module Review Manager; see also chapter [Start Page on page 21](#). See below [Information Provided below](#)
- For reviews started from a job in the Job Manager, you can view the voting behavior in the side panels *Details* tab after clicking on the tile of the respective review in the datasheet. In the row *Decisions* you can find the progress traffic lights showing the decisions of the participants without having to open the review.

Roles

Function	Owner	Reviewer	Guest	Uploader
View progress	✓	✓	✓	✓

Information Provided

The progress on the Review Manager overview page contains the following information in the last column *Review submitted*:

Information	Description
Approved	This number indicates how many reviewers have approved the review.
With Changes	Note: Only visible if the option to request changes is enabled. This number indicates how many reviewers have approved the review requesting a new version with changes.
Rejected	This number indicates how many reviewers have rejected the review.
Pending	This number indicates how many reviewers still have to submit their vote.

When a participant looks at the progress, the row assigned to the participant is highlighted in bold and (incl. You) is appended.

View Progress in the Review Editor

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. Switch to the *General* tab.
3. In the title bar you will see a circle for each reviewer. Initially, the color is gray, which means the participant didn't vote yet for this review.

When you hover the mouse pointer over the circle symbols, the name and decision of each respective participant will be displayed. The circle depicts the progress in color. The colors of traffic lights are used here. A red circle represents *Rejected*, a yellow circle represents *New Version requested*, and a green circle represents *Approved*.

The detailed review status, including the number of comments and activity, can be accessed in the area *Version Overview*.

The screenshot shows the 'VERSION OVERVIEW' section with two versions listed:

Version	Progress	Comments	Start date	Last activity
Version 1	100% (Green)	5	9/12/22	The classification of a global comment has been changed a day ago.
Version 2	33% (Red, Yellow, Green)	3	10/13/22	A new version has been requested 5 minutes ago.

A popup for Version 2 shows the following details:

- Approved by:** Robert Reviewer (13.10.2022 13:51h)
- Changes requested by:** Elena Employee (13.10.2022 13:49h)
- Rejected by:** Frankie Brown (13.10.2022 13:52h)
- In pending:** Alex Approver

3.2.2.5 View Asset Details

You may want to view the properties and meta data of the asset.



Note

Note that assets uploaded for a review are in a private collection of the uploader and are not visible to other users in Media Pool. To make the asset visible to other users in Media Pool after final approval as part of a review, you need to adjust the asset's metadata, such as VDB and category, using the *Edit Properties* dialog.

Rollen

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

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. The Review Editor opens with the *Annotation* tab active.
3. Go to the icon at the bottom left.
4. Select *Detailed view*.

The detailed view opens in a new window.

3.2.2.6 Download Asset

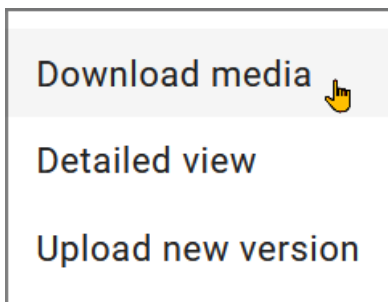
It may be necessary to download the file, for example for revision, and then upload it as the new version requested.

Roles

Function	Owner	Reviewer	Guest	Uploader
Download of the asset	✓	✓	✓	✓

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. At the bottom left click the icon .

The so called *More* menu is opened.



3. Select the *Download media* menu item.
The download window will open in a separate window.
4. Keep the settings at the default (original file format) and press *Download*.



You have saved the original asset locally to your browser's download folder.

3.2.3 Review and Vote on Asset

- [Comment and Mark Asset on page 56](#): As you review an asset, you identify and annotate elements and text that need to be refined.
- [Compare Versions on page 59](#): If two or more versions are run during a review, you have the option to compare the assets from the versions.
- [Switch to Version on page 60](#): You can switch to an older version if you don't want to compare the versions but want to view data in it. In this case, the older version is opened in read-only mode for viewing. The current version is the one in which the review is being worked on.
- [Edit Own Comments and Markers on page 63](#): This section describes how to add or edit your feedback.
- [Delete Own Comments and Markers on page 65](#): This chapter explains how to delete your own comments and markers if necessary.
- [Download Comments and Markers on page 67](#): If you want to share or use the comments and markers outside the system, download them.
- [Mark Annotation on page 66](#): This chapter explains how to mark annotations with a label.
- [Completion of the Review on page 73](#): After you annotated and marked the asset, you then vote on the asset. This chapter explains how to vote on the asset as a reviewer and complete a review as an owner.

3.2.3.1 Global Comments and Events

To use this function, review participants do need the `SEE_GLOBAL_COMMENTS` right. Without this permission the sidebar on the right will not be shown.

You are in the Review Manager on the *General* tab. On the right there is a sidebar divided into the four tabs *Comments*, *Events*, , . Clicking on one of the two clock icons sorts the comments and events in ascending and descending order by date and time. After opening, the oldest item is always at the top of the list of comments and events.

The tabs serve as filters as well. Filters that are active are indicated by a gray background color on the tab. If the filter is not active, the tab is white. Hide events by clicking the *Events* tab to filter only the comments. If you only want to see events, click the *Comments* tab to hide comments.

Participants can access global comments that are not related to a specific page content within the Review Manager and can write individual comments. In the comments, participants can write and send general remarks about the review. There is also an option to mark comments.

Write a Global Comment

You can access the global comments and events in the General tab in the right sidebar of the review opened.



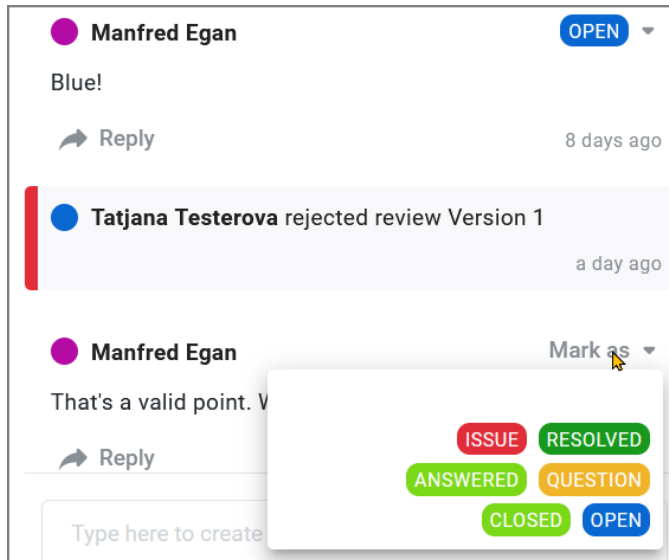
Note

If the filter is inactive, i.e. the title of the *Comments* tab is highlighted in white, you will not be able to write any comments. In this case, click on the tab again to make the comment input field visible.

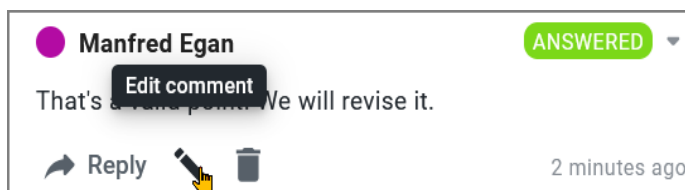
1. Click in the text box at the bottom of the list and compose some text.
2. To submit the comment, click on the paper plane icon.
3. Optional: Use the *Reply* button with a curved arrow to respond to specific global comments submitted by other users.

Mark a Global Comment

- Optional: You can mark global comments with the *Mark as* feature.



- Optional: You can revise your global comments with the pen icon or delete them with the trash icon.



By default, the following categorization options are available for commenters in the *Mark as* menu:

- Issue
- Question
- Open
- Answered
- Resolved
- Closed

For differentiation see also chapter [Mark Annotation on page 66](#).

Customizable *Custom Objects and Structures* are used for this feature. Administrators are thus have the option to define their own customized categories and color schemes for marking global comments and to add new ones. The configuration is described in the Administration chapter, see [Custom Objects and Structures on page 89](#).

Revise Comment Tagging

Your tagged comments can be edited at any time.

You want to completely remove the existing categorization on a comment?

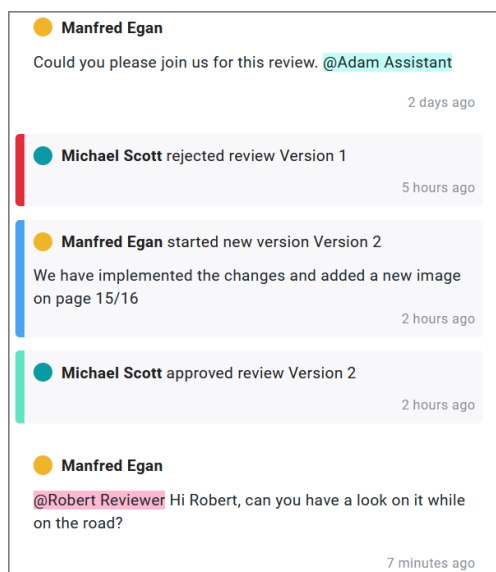
1. You remove an existing category by clicking the colored label.
2. Select *Remove Category* at the bottom of the menu.
You have removed the marker and the comment no longer has a categorization.

You want to change the categorization from *Question* to *Answered*?

1. You change the existing category by simply clicking the existing categorization label *Question*.
2. Make another selection in the Categories menu. Select *Answered*.
You have changed the categorization of the comment.

Events

Events include information around the review, such as approvals, rejected reviews or new versions. On this tab you will find generic comments of the review only describing its chronology.



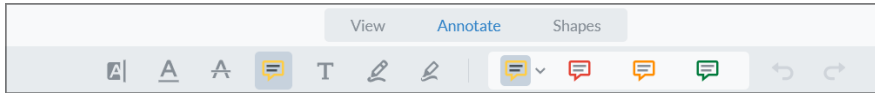
An example of an event is "Person XY started a new version: Version 2".

3.2.3.2 Annotation Tools

The Review Editor starts with the annotation tools enabled if the right ADD_ANNOTATION is given. Click *View* to hide all toolbars and to show the asset in a larger viewing area.

Toolbar *Annotate*

The Annotate tab contains, among other things, the text tools for highlighting, underlining, strikethrough, coloring, as well as a free text field and pen tools for freehand drawing.



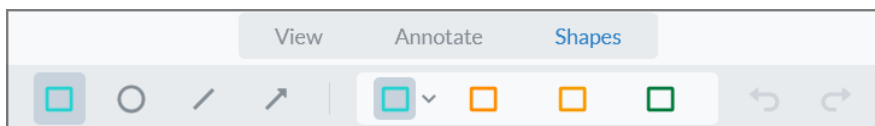
In the summary table, you will learn about the available tools in the order in which they are arranged. Advanced users prefer keyboard shortcuts instead of mouse operation. The hotkeys for the comment and shape tools work globally. That is, even if you are currently moving in a different toolbar. This can save you some mouse movement.

Annotation Tool	Hotkeys
Highlight text	H
Underline	U
Strikethrough	K
Sticky note	N
Free text	T
Freehand drawing	F
Freehand highlight	keins
Squiggly line	G
Undo	STRG-Z/CMD-Z
Redo	STRG-Y/CMD-Y

The first group of tools can be applied only to a text selection. With the speech bubble icon (Note) you can comment on images, videos as well as texts. To the right of it in the toolbar you will find the *Free Text*, *Freehand Draw* and *Freehand Highlight* annotation tools. The latter are applicable to all asset types.

Toolbar Shapes



Aside from shapes, the Shapes tab includes lines and arrow tools for highlighting elements on a page.



Shapes Tool	Hotkeys
Rectangle	R
Ellipse	O
Line	L
Arrow	A
Undo	STRG-Z/CMD-Z
Redo	STRG-Y/CMD-Y










Adjust Color and Style

Once you have selected a tool, you can choose from one of four standard colors on the right side or you can define your own color. You can customize both the border color and the fill color individually.

1. On the right side of the toolbar with the four standard colors , open the options via the arrow symbol  .
2. The color palette with 28 base colors and gray shades opens. You can also reduce the opacity of the highlight here to ensure that text underneath still remains legible.
3. Select the  icon under *Custom*. Use the color picker that opens to define your own RGB color.
4. When you use a tool to select text or create a new shape, a quick access toolbar appears below it. As in steps 2 and 3, click the style palette icon to adjust color and opacity.
5. Optional: Under *Stroke* you can adjust the line width of the drawing tool or the edge of a shape.

Global Tools and Functions

These tools make it easier to navigate or select text, for example. To better read a page in landscape format, a tool to rotate the current document page will help you.

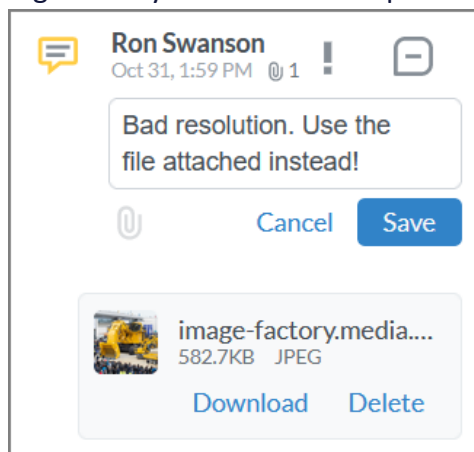
Tool	Hotkeys
Hand tool: panning of the image section in an enlarged document	
Press and hold to temporarily switch to the hand tool and release to return to the previous tool	
Rotates the full document page 90° counterclockwise	 / 
Switch to the text selection tool	
Eraser to erase all shapes under the mouse cursor with the mouse button pressed	
Stamp: inserts a local graphic at the position of the cursor	
Advance one page	 / 

Turn back one page	STRG-↑ / CMD-↑
Magnifying glass: opens Search for text in a text document review.	STRG-F / CMD-F
Print review	STRG-P / CMD-P

File Attachments and Links in Annotations


When adding a comment to an annotation, any file up to 10 MB in size may be attached. Other participants must download the attachment first in order to view it.

You can attach a file link to an annotation instead of a file attachment using links in annotations. While attaching a file only allows for one file per annotation, linking allows you to send multiple files with an annotation at the same time.



A link is also useful when you have a large file, such as a video, that you can't attach due to the size limit. You can use any type of link, such as one to a collection of assets in the Media Pool or one to an entire folder in SharePoint, OneDrive, Google or other service. When you click the link, it will open the target in a new browser tab.

3.2.3.3 Mark Annotations

Select the  icon at the comment to an annotation to label it. A menu will open that offers various labeling options. See [Mark Annotation on page 66](#).

Global comments in the *General* tab can be marked individually in a similar way. See also [Global Comments and Events on page 50](#).

3.2.3.4 Comment and Mark Asset


When reviewing an asset, highlight and comment areas to improve.

Roles

Function	Owner	Reviewer	Guest	Uploader
Asset review: Create comments and markers	✓	✓	✓	✗

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. The Review opens and shows the *Annotation* tab.
3. Navigate to the *General* tab to view information about the review. This includes the *Review information*, *Version information*, *Version participants*, and *Version overview*.
4. In the sidebar on the right you will find *Comments* and *Events* around the review. Here you can write a global comment yourself.
5. Use the [Annotation Tools on page 52](#), review the asset, and provide feedback.


- **Example: Add Comment of Type Note**

- a. Go back to *Annotation* > *Annotate* tab. Select the *Note* annotation tool in the toolbar or press the letter **N** on the keyboard as an equivalent hotkey to switch to this tool.
- b. In the asset view, select the location you want to comment. A speech bubble icon is inserted at the location. Below this, a context-sensitive toolbar appears with functions such as *Comment*, *Style* and *Delete*. A new annotation opens in the right sidebar.
- c. Fill in your comment.
- d. Optional: Select the paperclip icon below your comment to upload a local file to your comment.
- e. Optional: Select the  icon to add a label to the comment. See [Mark Annotation on page 66](#).
- f. Press the *Save* button.

You have added a comment.

- **Example: Add Shape Marker**

- a. Go to the *Shapes* tab.
- b. Select a shape tool and a color to the right of it.

- c. Optional: open the \vee menu to adjust color, opacity and style.
- d. Position the mouse pointer to the left above the asset area you want to select. Hold down the mouse button. Without releasing the mouse button, drag a frame until the shape spans the area you want. Release the mouse button. The new annotation opens in the right sidebar.
- e. Fill in your comment to the marker.
- f. Optional: Select the paperclip icon below the comment text field to upload a local file to your comment.
- g. Optional: Select the  icon to add a label to the comment. See [Mark Annotation on page 66](#).
- h. Press the *Save* button.

You have inserted the marker on the selected area.

- a. Repeat beginning with step 5 until you have inserted all your feedback.
- b. If the document is a multi-page document:
- c. Flip through the pages using the vertical scroll bar. Or alternatively, use the page thumbnails in the left sidebar. Select a page thumbnail to jump directly to it.
- d. Check all pages of the document.

- **Floating Tool Palette**

- a. Select an annotation or marker in the Review Editor. For your own annotations or marker, you see this floating tool palette:



From left to right, these four icons have the following function:

- Add a comment
- Customize color, stroke, fill and opacity
- Delete the annotation/marker
- Create link to other page in review document or add a URL.

A rotate tool  is available for lines, arrows, sketches and shapes.

This is useful if you want to highlight the object to be marked even more precisely in this way.

- b. Click the rotate tool and hold down the mouse button while dragging to rotate in the desired direction.

You have reviewed, tagged and annotated the asset and provided your feedback.

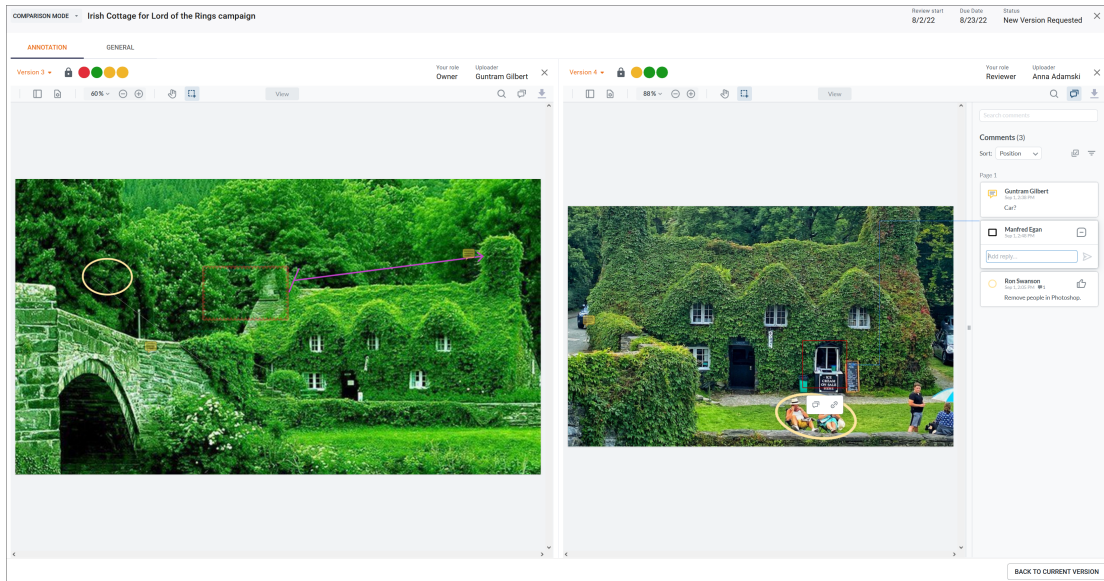
3.2.3.5 Compare Versions

If two or more versions are processed during a review, you can compare the assets from the different versions. When comparing two versions, you can also enter markers and comments, as well as send messages. These options, however, are only available for the current version with annotations and notes from older versions being read-only.

Roles

Function	Owner	Reviewer	Guest	Uploader
Compare versions	✓	✓	✓	✓

1. Locate and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. Navigate to *General > Version Overview*. If no versions are shown, press the ^ arrow to expand the view.
3. A list of previous versions is shown in the version information.
4. Tick a previous version and the current version to compare them side by side.
5. Press *Compare*.
The assets of the selected versions are shown side by side.



- Compare the versions and enter your feedback. Note that only in the current version you can enter comments and markers according to your role, as well as send messages. For the previous versions these areas are inactive.

You compared the two versions and provided feedback on them.



Note: If you want to switch from the comparison mode back to the single view of a version, press the close field at the version whose view you want to close. To return to the current version you can always use the Back to current version button.

You can switch directly from annotation mode to comparison mode while reviewing the current version. To do this, use the version menu in the upper left corner. Mark two versions for comparison and then select the *Compare* button.

3.2.3.6 Switch to Version

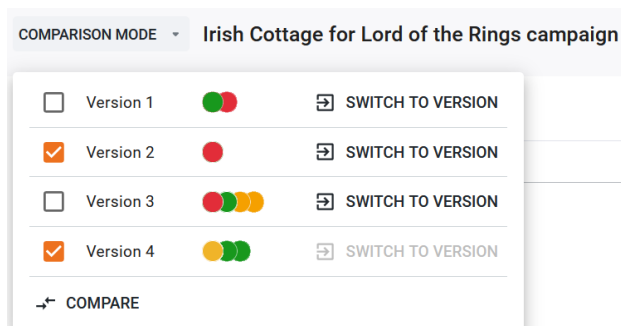
If you do not want to compare the version, but want to view data in an older version, you can change the version. In this case, the older version is only made available for viewing. The current version remains the active version on which the review is edited.

Roles

Function	Owner	Reviewer	Guest	Uploader
Switch version	✓	✓	✓	✓

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. Click the *Version* menu in the upper left corner next to the review name.

A list of all versions is shown.



3. In the list, select the line of the version you want to switch to and press the *Switch to version* button.

The selected version will be shown.



Note

Keep in mind that you can only access all annotation features based on your role in the current version. You can also quickly access the versions if you have the right to see the *General* tab.

3.2.3.7 @Mentions

The @mention functionality is available to review participants both in global comments under the *General* tab and under *Annotation* in the review comments.

It is possible to mention other users in comments by @mention. The mentioned user is automatically notified about the mention via e-mail or in the application under the bell icon. The user can then jump directly from the notification to the Review Manager.

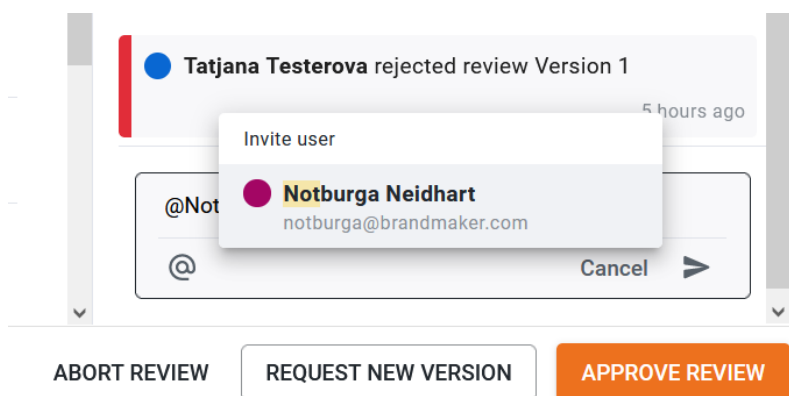
In the comment field, you can mention other users from the system's user list at any point in the text. You will see only those user names that have been assigned a role in Review Manager by the administrator.

The @mention feature first suggests participants from the review when they are entered, and below that it offers to invite other users as participants. However, it is not possible to spontaneously invite any substitute to the review who does not have permissions for the Review Manager.

Use Case Scenario

The logged-in user is writing a global comment as the owner of the review and would like to mention another user and invite her to the review.

1. If you type @ in the comment field without any other letters, all participants in the review are listed instantly
2. If you enter the first three letters of the first name, the specific user, Notburga Neidhart, will be shown in the *Invite user* list.
3. Select the user you are searching for from the list.
4. Write your comment and submit it by clicking on the paper plane icon.



You mentioned the user Notburga in the comment with @ and at the same time added her as a participant to the review.

Add as New Participant

Users who were not previously invited to participate, but are mentioned @ in a review, are automatically added to the review as a new participant with the *Reviewer* role.

Each mentioned participant will receive an e-mail notification, regardless of whether they are already in the list of participants.

If a mentioned user is already a participant in the review, the existing role in the review remains untouched. A guest always remains a guest and owners do not become reviewers.

If review participants do not have the necessary `MANAGE_PARTICIPANTS` permission to manage the participants of the review, they can use @-Mention to select and mention only people from the original list of participants. These participants cannot add new participants by @mentioning them.

In the *Annotation* tab, participants who already participate in the review can be mentioned via @mention with the same procedure in the comment field of a marker. Accordingly, new participants mentioned in an annotation are also added with the role *Reviewer*.

3.2.3.8 Edit Own Comments and Markers

In this section you will learn how to append further comments or edit your feedback.

Roles


Function	Owner	Reviewer	Guest	Uploader
Edit your comments and markers	✓	✓	✓	✗

Search and Organize Comments



The *Search comments* input field filters the list of comments according to the search term and matches appear highlighted in yellow.

For larger documents with many annotations, you can sort them in different ways. The default sorting is by the Position in the document. There are also sorting options by *Created date*, *Modified date*, *Status*, *Author*, *Type* and *Color*. For videos, you can additionally sort by *Frame* and *Timecode*.

Multi select: Click  to select and then edit multiple annotations in one go.

Optional: Select the filter icon . This will open a window with the filter options to set various restrictions. You can filter the annotations to be deleted by user, color, type or status.



Note: If the *Comments* sidebar is not visible, select the icon  in the toolbar to show it. Select the icon  again to hide the sidebar.

Edit Comment

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. Find the annotation you want to modify in the list in the right pane.
3. Choose the desired entry from the list. For multi-page review documents, clicking on an annotation text in the annotation list displays an connecting arrow between the annotation and the relevant annotation, and the view


jumps to the corresponding page. The annotation is highlighted in the Review Editor and shapes are outlined.

4. Optional: Click annotations and shapes directly on the current page in the document view. A connecting arrow then points to the content for that element in the sidebar. A context aware toolbar opens below the selection.
5. If you select an annotation will switch either into *Comment* or *Reply* mode.
6. Shapes, position and color can be freely adjusted. Open the **...** menu on the annotation to reach the *Edit* and *Delete* functions.
7. Select *Edit*.
8. The text field can now be edited. To save the changes, press *Save*.

You have changed the comment of an annotation.

Change Markers

Note that you can only change the size, position, color and link of your own markers. The initial shape itself (from rectangle to circle) cannot be changed afterwards.

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. In the asset, locate the marker you want to change.
3. Optional: In the list in the right pane, find the marker you want to change.
4. Optional method: Move the mouse pointer over an annotation in the main display. The reviewer's name and the comment will be displayed next to the mouse cursor. Use the mouse to activate the marker.
5. The marker is shown in edit mode and a palette appears below with tools for *Comment*, *Style*, *Link* and *Delete*.
6. Optional: Change the size of the marker. To do this, click one of the blue handles on the marker and drag the shape to the desired size. Hold down the **SHIFT** key while resizing for proportional scaling.
7. Optional: Choose a different color for the marker with the palette icon.
8. Optional: Select a link target (external URL, page in the review) under the link icon.
9. Optional: Multi select  allows you to respond to a selection of annotations with a comment, adjust the style for the selection, or delete the selection.

**Note**

You are only allowed to comment or add a link to other participants' markers and annotations. But you cannot move them, change their color or delete them.

You have changed a marker.

3.2.3.9 Delete Own Comments and Markers

In this section you will learn how to delete annotations and comments you have created. Note that this always deletes attached annotations and file attachments as well.

Multi select: Click to select and then delete multiple annotations in one go.

Optional: Select the filter icon . This will open a window with the filter options to set various restrictions. You can filter the annotations to be deleted by user, color, type or status.



Note: If the *Comments* sidebar is not visible, select the icon in the toolbar to show it. Select the icon again to hide the sidebar.

Roles

Function	Owner	Reviewer	Guest	Uploader
Delete your comments and markers	✓	✓	✓	✗

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. In the right sidebar, find the annotation you want to delete.
3. Select an annotation, then it will switch to reply mode.
4. Open the **...** menu on the comment to reach the *Edit* and *Delete* functions in the menu.
5. Select *Delete*.
6. Optional: If you have deleted an annotation by mistake, you can undo the operation with the hotkey **CTRL-Z**/**CMD-Z** or the undo icon in the toolbar. Undo and redo also works after deleting a multi-selection.

The annotation or marker and the associated comment are deleted.

1. Optional: Hover the mouse pointer over one of your markers in the main display.
For items you have created, the reviewer's name and the comment will be displayed next to the mouse cursor.
2. If you select the icon of the text annotation or the frame of a shape marker, a context-sensitive palette of tools appears.
3. Select the trash icon to delete.

The annotation or the marker and the associated comment are deleted.

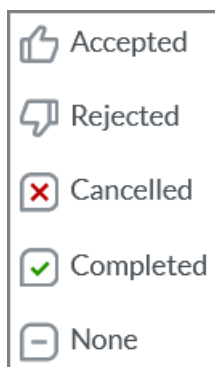
3.2.3.10 Mark Annotation

You navigate to the *Annotation* tab inside review editor. In the comments, you can control communication at a more granular level via markers on individual annotations.

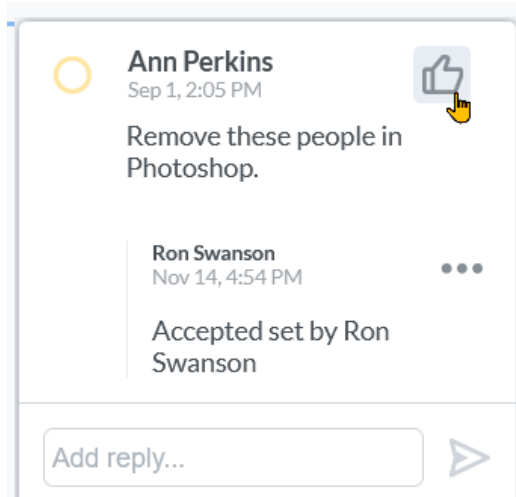
Example: You will find a task "Remove these people in Photoshop." in the comment for the marker.

1. Select the  icon on an annotation to apply a label to it.


A menu opens, which by default has these options to choose from:



2. Select *Accepted* to signal to the other party that you will take care of it.



The icon on the comment changes from  to .

3. Optional: To change the comment status from *Accepted* to *Done*, click the icon  at the comment.

The menu opens.

4. Select *Done*.
5. Optional: To delete a marker from a comment, click the ... icon on the marker under the comment and select *Delete* in the menu that opens.

For differentiation see also [Global Comments and Events on page 50](#)

Administrators can customize the label texts for the use cases in your organization. You can learn how this works in the chapter [Custom Objects and Structures on page 89](#).


3.2.3.11 Download Comments and Markers

If you want to share or use the comments and markers outside the system, you can download them. The download file is a PDF that can be opened and viewed with common viewers like Adobe Acrobat Reader or Apple Preview.

Roles

Function	Owner	Reviewer	Guest	Uploader
Download comments and markers	✓	✓	✓	✓

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).

2. The review opens and shows the *Annotation* tab.
3. To download, select the icon  at the top right of the toolbar.

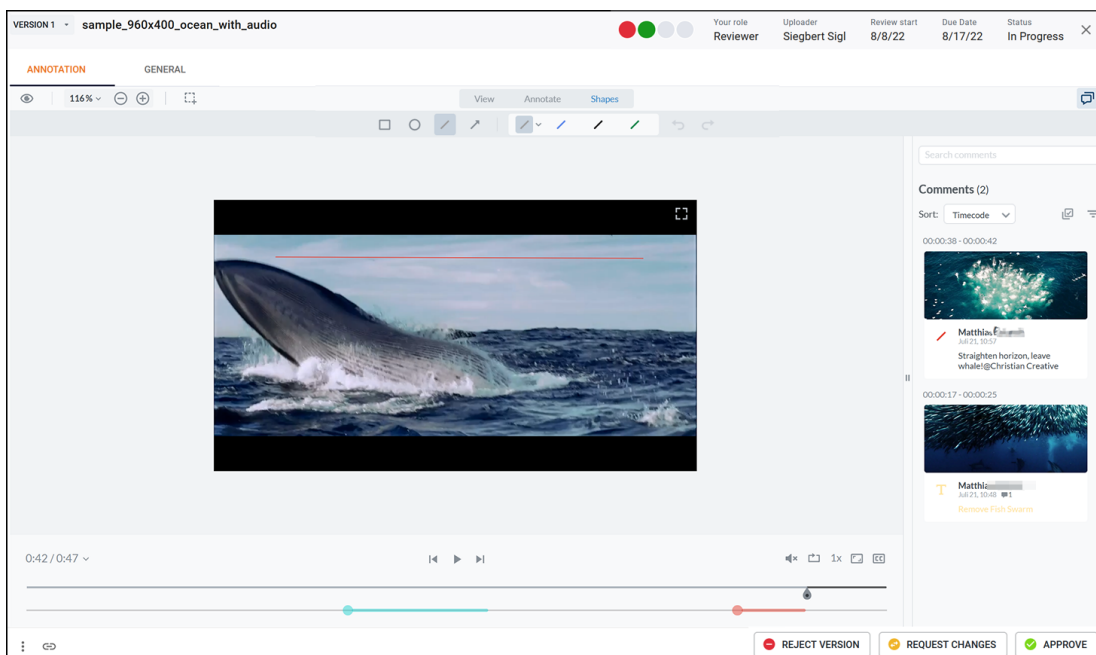
In the background, the data is compiled and downloaded as a PDF file. For this, a generic file name is utilized. After the download is complete, you should find the file in your local download folder for further use.

You have downloaded the review document including all comments and markers.

3.2.3.12 Reviewing Videos

You have the possibility to create a review for supported video formats

MP4 format is supported by default.




Note

Ask your administrator to make the WEBM file format available in the Media Pool and therefore in Review Manager. Although this video format is not officially supported in the delivery state, it does not cause any problems in practice after activation.

Add markers and comments to the video

1. Press the  button to start playing the video.


You can use the tools under the player to adjust the volume, loop mode, playback speed, aspect ratio and subtitles to your liking.

2. Enter the time in the field in front of the total duration and press Enter  to jump to a specific point in the video.
3. If you want to add a marker or a comment to a certain section of the video, click the *Comment* or *Shapes* tab in the toolbar after pausing the playback.
4. Optional: Choose a custom color for the marker or comment, type your text, and click Save. This way you can find it again more easily.
5. To change the duration of a marker or comment, click on the corresponding entry and use the arrow keys to lengthen or shorten it. You can also use the mouse to move the beginning or end of the displayed marker or comment.
6. Post a comment on the annotation to solicit feedback or provide instructions.

You have annotated the video.

Search, edit and filter comments on the video

Comments from other video review participants can be found in the right sidebar. Comments are displayed by time stamp, with the newest at the bottom.

1. Use the search box to find specific terms in comments.
2. You can sort the comments individually by *Created Date*, *Modified Date*, *Status*, *Author*, *Type*, *Color*, *Frame* or *Timecode* using the *Sort* menu.
3. In the *Filter* menu you can filter out specific annotations by user, color or shapes.
4. To jump to the section of the video linked to a comment, click the comment (or its thumbnail, if available).
5. To reply to a comment or mark it as done, click on the comment or preview¹ and select the appropriate option from the menu To edit or delete a comment, click the ... icon to access the *Edit* or *Delete* menu commands.
6. Optional: Use the multiple selection  to reply to all marked comments at once.
7. When you are done with the video review, you can download the video. To download the video, click the **:** menu at the bottom left of the window and choose *Download Media > Original* or another export format. To share the video, click *Copy link to review* and paste the link in a message.

You have performed a video review.

**Note**

Preview images in the *Comments* sidebar are only enabled for Chrome and Edge browsers, as these are the two browsers officially supported for this feature.

In all other browsers (e.g., Safari, Firefox), video previews are disabled in the *Comments* sidebar, so only the comment is visible, not the preview image. If you prefer to see previews, please use one of the supported browsers for your video comments.

3.2.4 Manage a Review

- [Remove Participant from Review below](#): This section describes how to remove a participant from the review if necessary.
- [Request a New Version on the facing page](#): You have received sufficient feedback and want to start a revision of the asset. To do this, owners request a new version.
- [Uploading a New Version on page 72](#): Once the changes are incorporated, the uploader or an owner must upload the revised asset for the new version. After that, the review can be resumed by the participants in a new version.

3.2.4.1 Remove Participant from Review

This section describes how to remove a participant from the review if necessary.

Roles

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

**Note**

Users with the MANAGE PARTICIPANTS right are able to remove participants from the review as well as invite participants. Thus, we advise to assign this right only for owners, otherwise reviewers would get the same rights as the owner.

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).

2. Navigate to *General > Version participants*. If the list of participants is not shown there, press the ^ arrow to expand the view for the area. The participant area is on display. The list will show all invited participants.
3. Hover the mouse over the participant in the participant list. Now you can select the ✕ icon at the end of the row for the participant you want to remove from the review.

You now have removed the user from the review. This is communicated to the user via e-mail.

3.2.4.2 Request a New Version

Once you have received sufficient feedback you can start a revision of the asset. To do this, you request a new version as the owner.

Roles

Function	Owner	Reviewer	Guest	Uploader
Request new version	✓	✕	✕	✕

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. Select the Request *Request new version* button at the bottom right. The dialog *Request new version* opens.
3. In the *Uploader* field, select or search a user as the uploader. The user who uploaded the most recent version of the asset is automatically added to the list. In the case of a Media Pool asset, the original uploader from the Media Pool is displayed. Of course, you are free to select an uploader each time you request a new version.
4. Optional: Specify a date for the revision in the *Due Date* field.
5. In the *Optional Message* field, enter detailed information for the uploader and what to consider for the revision.
6. Exit the dialog with the button *Request*.

You have requested a new version for the review. The review is in the status *New Version Requested*. All participants are informed about this via e-mail. The uploader is also informed about the request to revise the asset for a new version.

3.2.4.3 Uploading a New Version


Once all revisions have been implemented, the uploader or owner must upload the new version of the asset. Following that, the participants can continue reviewing the revised version.

Rollen

Function	Owner	Reviewer	Guest	Uploader
Upload revised asset version	✓	✗	✗	✓

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. As an uploader, the *Upload New Version* button is available at the bottom right instead of the voting buttons. Select this button to start the upload.

UPLOAD NEW VERSION

3. Optional: As the uploader or owner of the review, select *Upload new version* from the  menu at the bottom left.

The dialog *Start new Version* is shown.

4. Press *Select Asset*.
5. The dialog for importing an asset or selecting an asset from the Media Pool is shown.
6. Upload an asset or select the asset from Media Pool. Observe the instructions in [Create Review on page 31](#).
7. Enter detailed information about the new version for the reviewers in the input field.
8. Finish the dialog with *OK*.

You have uploaded a new version. The review switches back to the status *In Progress*. The participants are informed about the new version via e-mail.

3.3 Completion of the Review

When completing a review, you as the owner either reject or approve the asset. Reviewers must use the *Reject Version* and *Approve* buttons to vote on the review after it is completed.



Note

When you (inadvertently) click the *Accept* button as the owner, this is not a vote like when you vote as a reviewer. The owner will permanently end the review by clicking this button.

Also note that a reviewer's decision does not affect the final status of the review. Only the final decision by the owner (*Accept* or *Abort Review*) completes the review, either in the status *Canceled* or in the status *Released*.

Rollen

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

1. Search and open the review, see [Search for a Review on page 39](#) and [Open Review on page 41](#).
2. Reviewer choices available are:
 - If you are satisfied with the version and want to approve the asset, select the *Approve* button as a reviewer to cast your vote for the review.
 - If displayed: Select the *Request Changes* button as a reviewer to submit your vote for the review with change requests.
 - If you reject the asset, select the button *Reject Version*.

You have submitted your decision on the review and this completes the review for you.

3. Owner choices available are:
 - If you want to authorize the asset, select *the Agree* button as the owner. There will be no confirmation prompt. Your decision changes the final status of the review to *Approved*. With this decision, you can override the majority of the reviewers if they voted against the asset.

- If you select the *Request New Version* button, after a revised or replacement asset is uploaded, the review must go through another round of voting.
- If you select the *Abort Review* button, this will end the review before it has been completed. A confirmation dialog is shown, because this decision is irreversible. After that, the review is in the final status *Canceled*.

As the owner of the asset, you have thus ended the review for everyone or requested a new version and a new review cycle.



Note

It is important to note that completing a review does not automatically make the asset available to all *Media Pool* module users.

App for iOS and
Android

4

With the new BrandMaker app from version 1.7, document reviews and approvals can be done on the go.

The Review Manager has been now integrated into the BrandMaker App. This makes you more flexible and independent to conduct and approve reviews.

The App is designed with the minimum functions for reviews on a small screen. In the overview, you can easily identify the reviews for which you are assigned as a participant or owner. Reviews may not have the same scope of functions as in the desktop version, but they can be managed with the proper amount of tools.



Note

Be aware that some typical desktop functions such as comparing two versions side by side, global comments, downloads, adding file attachments to a comment, and uploading a new version are not available in the App.

For you as an App user, this means in concrete terms:

- You will be able to view all reviews in which you are registered as a participant or owner.
- You can open reviews, edit them and decide on approval. Reviews of multi-page documents are possible.
- You can highlight and annotate as usual.
- You can comment and then link the comment to multiple pages in the overview.
- Zoom in and out of the document. Pinch two fingers apart or together to adjust the zoom.
- You can select multiple, non-contiguous pages of a multi-page document for display in full-screen mode and then edit them.

4.1 App for iOS and Android

With the new BrandMaker app from version 1.7, document reviews and approvals can be done on the go.

The Review Manager has been now integrated into the BrandMaker App. This makes you more flexible and independent to conduct and approve reviews.

The App is designed with the minimum functions for reviews on a small screen. In the overview, you can easily identify the reviews for which you are assigned as a participant or owner. Reviews may not have the same scope of functions as in the desktop version, but they can be managed with the proper amount of tools.



Note

Be aware that some typical desktop functions such as comparing two versions side by side, global comments, downloads, adding file attachments to a comment, and uploading a new version are not available in the App.

For you as an App user, this means in concrete terms:

- You will be able to view all reviews in which you are registered as a participant or owner.
- You can open reviews, edit them and decide on approval. Reviews of multi-page documents are possible.
- You can highlight and annotate as usual.
- You can comment and then link the comment to multiple pages in the overview.
- Zoom in and out of the document. Pinch two fingers apart or together to adjust the zoom.
- You can select multiple, non-contiguous pages of a multi-page document for display in full-screen mode and then edit them.

4.2 Installation and Configuration

The BrandMaker App 1.7 is now available free of charge for iOS and Android. The App has also been successfully tested on the iPad. You can download the App from the Apple App Store and the Google Play Store.

Simply point your device's camera at one of the QR codes to go to the authorized store download.

Apple App Store

Use your iPhone or iPad and point its camera at this code. Once the code is captured, tap the label with the hyperlink and the App Store will open. Follow the on-screen instructions to download.



Google Play Store

Use your Android device and point the camera at this code. Once the code is captured, tap the label with the hyperlink and the Play Store will open. Follow the on-screen instructions to download.



Set up the App

When you open the App for the first time, you have to enter the URL of your BrandMaker system once.

1. In the "Welcome to BrandMaker" screen, enter the full domain name of your BrandMaker system in the Domain field. Example:
`mycompany.brandmaker.com`
2. If you work only on this system, it is recommended to set the checkmark *Remember domain*.
3. After you have pressed *Next*, you can enter your user name and password in the login mask on the following page as usual.
4. Optional: Set the checkmark at *Remember username*.
5. Optional: Intro pages are displayed in a defined order after the App has been launched.




Note

You can use a text button to scroll forward through the intro pages page by page. Optionally, the page content can also be scrolled forward or backward with a swipe gesture to the left or right. If no button text is stored, however, this does not mean that you have to swipe all pages to the left. The intro pages can be quit prematurely in the App at any time by swiping the screen content downwards.

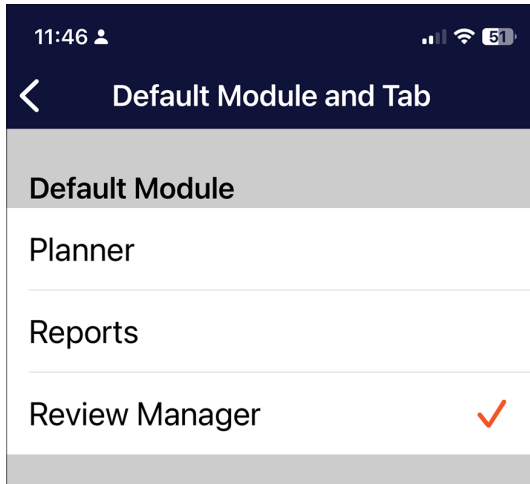
You have launched the app, set it up, and are in the Planner's calendar view.

Open Review Manager directly upon Launch

To always go directly to the Review environment and not to the default Planner page, adjust your App settings.

1. Launch the BrandMaker App.
2. Navigate to >  > *Settings* > *General*.

The *Default-Modul and Tab* page opens.



3. Tap to set the checkmark for *Review Manager*.

The adjusted setting is saved automatically.

4. Navigate back by tapping <, and then ☰ > *Review Manager*.

You have set up the Review Manager as the default module. The next time you start the App, you will be taken directly to the current reviews.

Customizing the App

As an administrator, you can preconfigure the App under the > *Administration* > *Mobile App* section. See chapter *Mobile App: Skinning and Intro pages* in the manual. [Administration](#) (PDF-[Download](#)).

4.3 Mobile Reviews

The Review Manager can be used in both vertical and horizontal orientations. The view and layout of the tools change as a result. The advantage of using landscape mode is that you have direct access to the entire annotation and comment toolbar, requiring less scrolling. In vertical mode, you can use your finger to scroll the tools to the left to make more of them visible.

Review Overview

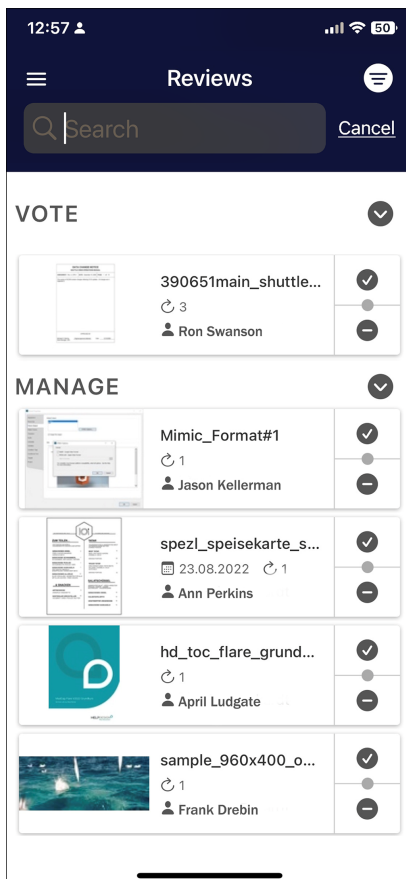
As opposed to the desktop version, once opened, you will see a seemingly unorganized list of reviews in which you act either as an owner or a reviewer.

1. Use the  icon at the top right to filter out only those reviews that are due within the next 5 days.

You will now only see reviews that need to be edited soon.

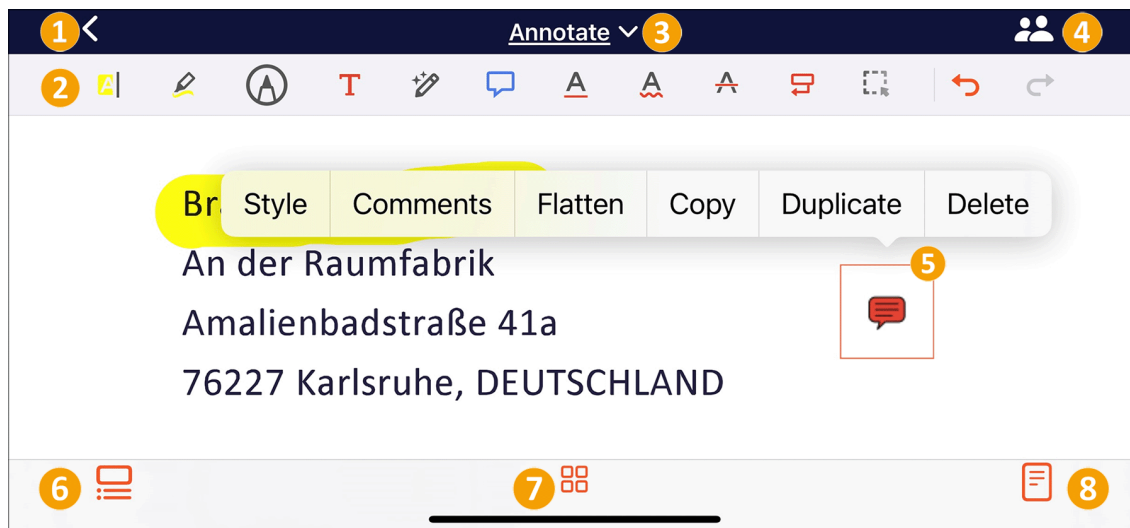
2. Tap on it again to deactivate the filter.

You will now see all pending reviews again.



Do you recall the title of the review? If this is the case, use the search box to quickly identify it again.

Comments and Annotations



In the table below you will find the corresponding legend to the numbers in the illustration.

No.	Description
1	Back to the main page
2	Toolbar
3	Switch toolbars. Tap the arrow to select another function from the menu.
4	Manage participants. New participants can be added to the review as reviewers in the App. Existing participants can be removed from the participant list with ×.
5	If you tap on a shape or an annotation, a context menu with further options appears above it. Select <i>Comments</i> to enter a comment with proofreading instructions. You will send your comment with <i>Post</i> . Optionally set a Review State in the title bar. You leave the comments with <i>Done</i> .
6	This icon takes you to the outline view of multi-page documents, and in the second tab to the list of annotations. Tap on a marker or comment to reply directly.
7	This button takes you to the page thumbnails. With the filter <i>Annotated</i> you can show only commented pages and open them in large view with a tap on it.
8	Switches to a special reading mode without illustrations. Multi-column text is displayed in full screen width.

Vote

You can quickly submit your vote on the review on the main page.



In contrast to the desktop version, tapping the checkmark corresponds to approval and tapping the minus sign corresponds to disapproval.

Following the vote, the review is removed from the review overview.



Note

On the iPad or devices of similar size, a number of standard controls are accessible via the top navigation bar, whereas on compact smartphones they appear in the toolbar at the bottom for space reasons.

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

Administration

5

This chapter describes how to configure the module Review Manager as an administrator.

- [Rights on the facing page](#): This section describes what rights the module offers.
- [System Settings on page 88](#): This section explains the system settings of the module Review Manager.
- Configuring [Custom Objects and Structures on page 89](#) .


5.1 Rights

The Review Manager's individual rights are described further below. If only the right MODULE ACCESS is assigned, the Review Manager's standard configuration with the roles Owner, Reviewer, Uploader, and Guest applies. Please see the tables in chapter [Roles on page 10](#) for information on what these roles are allowed to do and see.

Name	Description
MODULE_ACCESS	The user can access the module Review Manager and create reviews. A user with this right only can be invited to a review as owner, reviewer and guest and is able to vote. He can upload a new version as an uploader. The <i>Annotation</i> tab and the <i>General</i> tab with global comments and the option to manage reviews and their participants as owner are only available with the corresponding separate rights.
ACCESS_GENERAL	The user gets access to the <i>General</i> tab. Without this right, the tab is not visible to the user.
ADD_ANNOTATION	The user with this right is allowed to annotate reviews. Without this right, the annotation tools are not available and are not shown to the user. The annotations of other participants can then only be viewed.
SEE_GLOBAL_COMMENTS	The user is allowed to view and write global comments listed in the right sidebar of the <i>General</i> tab. Without this right, this area will not be shown to the user.
MANAGE_PARTICIPANTS	The user is authorized to manage the participants in a review. This right must therefore always be applied to the user group to which the creators, i.e. owners, of the review belong. This right enables the following functions: <ul style="list-style-type: none"> • invite new participants, also via the option @-mention • Remove participants from a review • Change the role of participants

5.2 System Settings

System settings for the Review Manager that are not listed here are used for licensing and are pre-filled by BrandMaker during the initial installation.

Name	Description
Decision "Approved with changes"	This setting activates the button <i>Request changes</i> . 

5.3 Custom Objects and Structures

Annotation and global comment classifications are saved as custom objects and structures. Customers can now define their own terms for the classifications provided or add new entries to the user menu.

Customize Annotation Classification

1. For individual text modifications and your own menu entries go to > *Administration > Data Structures & Workflows > Custom Objects & Structures > Custom Objects*

You are on the page entitled *Custom Objects*.

2. In the menu, locate and choose the custom structure *Review Manager annotation reason codes(RM_ANNOTATION_MARK)*.

3. You load and open the structure with the *Select* button.

Example: You want to change the label text from *Cancelled* to *Aborted*.

4. Choose the entry you want to edit in the menu *Select available custom object* .:

You will find the actual name in capitals in the *Name* field and as part of the *Name displayed* field below it.

Custom Objects Global change history ▾

Select custom structure :

Review Manager annotation reason codes(RM_# ▾)

Review Manager annotation reason codes(RM_ANN#) Select

Create new custom object :

Create

Select available custom object :

Abgebrochen (CANCELLED) ▾ Change history ▾

Status * : Only available for editing ▾

Name * :

Name displayed * :

Select available attribute Attribute ID ▾

5. Change the highlighted text as shown in the screenshot above to *Aborted*.
6. You can ignore the *Attributes* field at this point. It contains raw SVG data for the icon displayed before the label text.
7. Edit the language variants in the *Name displayed* field and finish your edits with the *Save* button.

You have customized the label of one of the provided classifications for annotations. See also [Mark Annotation on page 66](#).

Customize Comment Classification

Likewise, you can provide alternative classifications for the global comments. See user section under [Global Comments and Events on page 50](#).

Example: You want to change the label text from *Resolved* to *Fixed*.

1. In the menu, select the custom structure *Review Manager comment classification(RM_GLOBAL_COMMENT_MARK)*.
2. You load and open the structure with the *Select* button.
3. Find the and choose the entry *Resolved (RESOLVED)* in the menu *Select available custom object*.
You will see the actual name in capitals in the *Name* field and the *Name*

displayed in the field below it.

Custom Objects Global change history ▼

Select custom structure :

Review Manager comment classification(RM_GI ▼)

Review Manager comment classification(RM_GLOB)

Create new custom object :

Select available custom object :

Gelöst (RESOLVED) ▼ Change history ▼

Status * : ▼

Name * :

Name displayed * :

Select available affiliate ▼

Attributes :

COLOR [Text]:

#18981d

GROUP [Whole number]:

1

4. Change the highlighted text as shown in the screenshot above to *Fixed*.
5. Edit the field *Name* and the language variant in the *Name displayed* and finish with the *Save* button.
6. Optional: In the Attributes field in the *COLOR [Text]* area, change the color for the label to a different color in hexadecimal format.

You have customized the label of one of the provided default classifications for global comments.

Create new Custom Object

1. To create a new object, go back to step 2 and first enter the name in the *Create new custom object:* field.

Custom Objects Global change history ▾

Select custom structure :

Review Manager comment classification(RM_GI ▾)

Review Manager comment classification(RM_GLOB) Select

Create new custom object :

Delayed Create

Select available custom object :

Please choose ▾

2. Confirm by pressing the *Create* button.
3. To avoid errors, it is best to populate the object with the entries of a default entry whose fields you have previously copied and stored temporarily.
4. Edit the *Name* field and the language variants in the *Name displayed* field and finish with the *Save* button.

If you have any questions, please contact your BrandMaker contact person.