



International Plant Protection Convention
Protecting the world's plant resources from pests

ENG

IPPC ONLINE COMMENT SYSTEM USER MANUAL

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1. Introduction to the IPPC Online Comment System

The IPPC Online Comment System provides IPPC stakeholders a safe and secure place to insert, share and submit comments on documents; for the IPPC Secretariat to compile comments in a simple and efficient manner and to provide data for analysis.

Background

The IPPC Secretariat developed the first version of the system in 2011, and has been using it for consultation on draft specifications and draft ISPMs.

In 2014, because of the rapid evolution of online technologies and issues with the system's compatibility, performance and user-friendliness, the IPPC Secretariat joined the Codex Alimentarius Secretariat to procure an off-the-shelf product meeting user needs.

What were some of the user requirements for this new system?

The Secretariat launched a survey asking its most frequent users of the previous version of the Online Comment System what their most important needs and challenges with the system were. The Secretariat received the feedback below, including some of its own requirements from FAO:

- multi-tenant license
- multilingual
- compatible with mobile devices and all major internet browsers
- user friendly
- minimal user registration and management can be done within the organization and not by the Secretariat
- customizable
- one user can have multiple roles
- possibility of internal and external reviews
- comment categories
- email notifications
- search capabilities
- data and report exporting

Why do we have a new system?

The Secretariat has decided to implement the new Online Comment System because it:

- is a faster and more reliable system
- has a more simplified layout
- is compatible with all major internet browsers and mobile devices
- provides direct access to organizations to the documents under review, without requiring Secretariat management of accounts and granting access
- provides document navigation more similar to real-world experience of commenting
- provides an improved search function for users

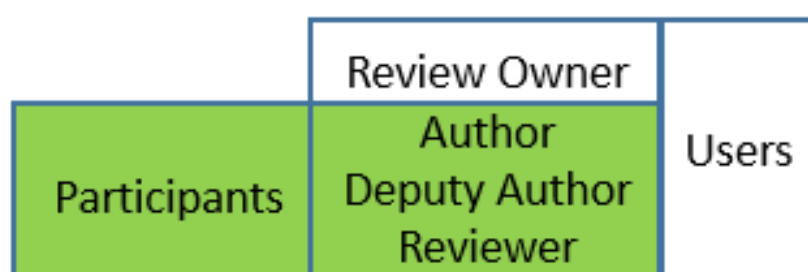
Why is there a difference in terminology in the new system?

To save resources, the Secretariat purchased an already-made, off-the-shelf product. We are also sharing this product with the Codex Alimentarius Secretariat. This means that some parts of the system are customizable, but not all aspects. Table 1 provides a brief overview of the terminology used in the previous system and the terminology you will need to become familiar with in the new system.

Table 1: List of terminology used in the previous Online Comment System and the new system

Previous version	New system
Consultation	Review
Explanation	Comment
Edit	Proposed change
Submit comments	Publish comments
Compiled comments	Reconciliation report
Sharing (in-country collaborating and global rule sharing)	Distribution lists (personal and shared)
N/A	Workgroups and Sub-workgroups
Roles: Contact Point, Assistant and Reviewer	Roles: Author (Contact Point), OCS Deputy (Assistant), and Reviewer

System roles



- Review Owner → IPPC Secretariat.
- Author → Contact Point (See section 6).
- Deputy Author → Delegated by Contact Point (See section 6).
- Reviewer → See section 6.
- Participants (to a review): author, deputy author, reviewer
- User: everyone holding an account.

2. Useful resources and contact information for the IPPC Online Comment System

The IPPC Secretariat has produced several resources to help you when using the Online Comment System. Most of these resources are on the IPPC website, or 'IPP'.

To access the available resources about the system, visit www.ippc.int. From the IPP home page, select Core Activities, then Standard Setting. Once on the Standard Setting Home page, select 'IPPC Online Comment System (OCS)' on the right side. This will bring you to the system's resources page, where you can find training materials, helpful links, and Secretariat contact information. You may want to bookmark this page for future reference.

If you need any assistance with the system, contact the IPPC Secretariat at IPPC-OCS@fao.org. The Secretariat usually returns emails within 24 business hours after receiving requests for assistance. If you have not received a response email within 48 business hours, check the 'junk' or 'spam' folder of your email system for a Secretariat response. If you still have not received a Secretariat response within 72 business hours, resend your email to IPPC-OCS@fao.org and include a telephone number at which we can contact you to resolve your issue.

3. Homepage and dashboard

To access the IPPC Online Comment System, visit <https://ocs-new.ippc.int/>. The IPPC Online Comment System homepage (see Figure 1) includes the login area, links to training material and documents open for consultation, and how to contact the Secretariat for further assistance. The system is available in English, French and Spanish.

Figure 1: View of the IPPC Online Comment System home page

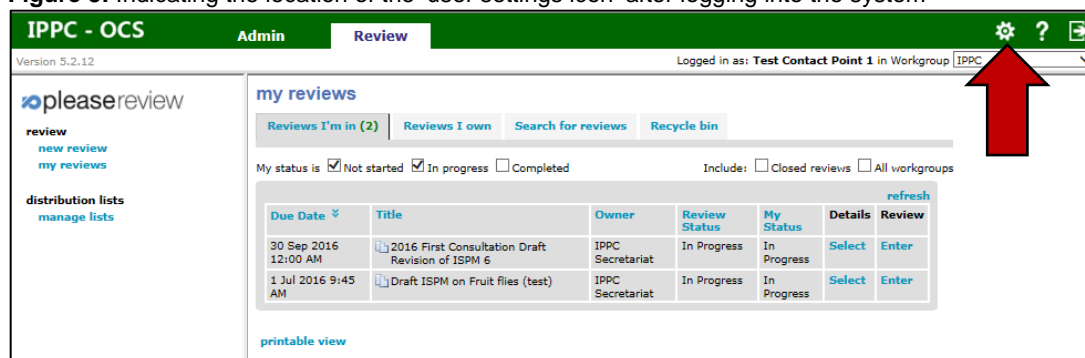
4. Login, how to retrieve your password, and how to change your password

To access the IPPC Online Comment System, visit <https://ocs-new.ippc.int/>. To login, enter your user name and password in the login field and select 'login' (Figure 2).

Figure 2: View of the IPPC Online Comment System home page, with the login area indicated

If you have forgotten your user name or password, select the 'reset password' link on the OCS home page. This will direct you to a screen to enter the email address associated with your account. The system will automatically send an email to you with instructions on how to reset your password. If you have not received a response email within one hour, check the 'junk' or 'spam' folder. If you need any further assistance, contact the IPPC Secretariat at IPPC-OCS@fao.org.

To change your password, login to the system and select the 'user settings' icon (Figure 3). Next, select the 'profile' tab in the user details window (Figure 4). Then, under 'user details', enter your old password, the new password you would like to use, and re-enter the new password again in the 'confirm password' field (Figure 5). Select 'OK' to save your changes.

Figure 3: Indicating the location of the 'user settings icon' after logging into the system**Figure 4:** Indicating the location of the 'Profile' tab in the user details window

The screenshot shows the 'edit your own user details' window. The 'Profile' tab is selected, and a red arrow points to it. The form contains fields for User email address, Login name, User full name, Language, and User Type. Below these fields are fields for Old Password, New Password, and Confirm Password. A password policy note is displayed at the bottom of the form.

edit your own user details

specify user details

User email address: aa@aa.aa
 Login name: Test-CP1
 User full name: Test Contact Point 1
 Language: English (United States)
 User Type: Default

Old Password:
 New Password:
 Confirm Password:

Password policy: minimum of 8 characters including at least 1 number and 1 letter. Política de contraseñas: mínimo de 8 caracteres, incluyendo al menos 1 número y 1 letra. Politique relative au mot de passe: minimum de 8 caractères dont au moins 1 chiffre et 1 lettre.

OK Apply Close

Figure 5: Indicating the where on the 'profile tab' to change your password

The screenshot shows the 'edit your own user details' window. The 'Profile' tab is selected. A red arrow points to the password change section, which includes fields for Old Password, New Password, and Confirm Password. A password policy note is displayed at the bottom of the form.

edit your own user details

specify user details

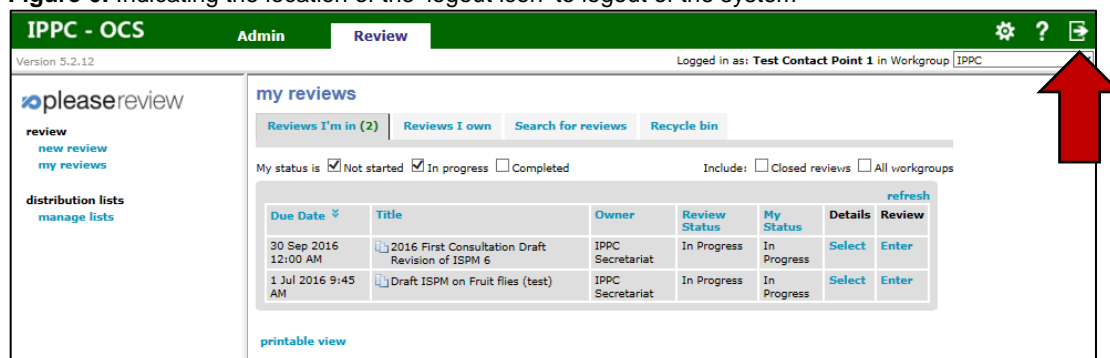
User email address: aa@aa.aa
 Login name: Test-CP1
 User full name: Test Contact Point 1
 Language: English (United States)
 User Type: Default

Old Password:
 New Password:
 Confirm Password:

Password policy: minimum of 8 characters including at least 1 number and 1 letter. Política de contraseñas: mínimo de 8 caracteres, incluyendo al menos 1 número y 1 letra. Politique relative au mot de passe: minimum de 8 caractères dont au moins 1 chiffre et 1 lettre.

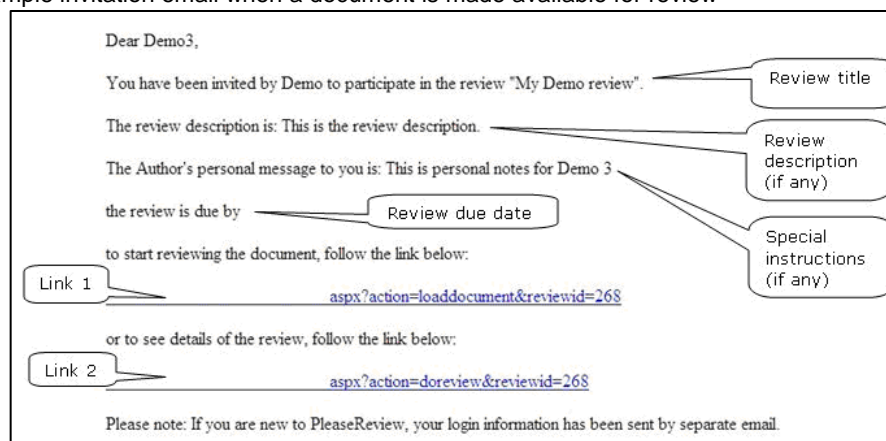
OK Apply Close

To logout of the system, select the logout icon in the upper right corner of the system (Figure 6). You will receive a message confirming you wish to logout. Select 'yes' to logout.

Figure 6: Indicating the location of the 'logout icon' to logout of the system

5. Invitation email

Once the Secretariat makes the documents available for review, the Author (IPPC Official Contact Point) will receive an invitation email that you may now begin commenting on the documents. It is the responsibility of the Author to ensure that the email account on the IPPC website is current. Figure 7 shows a sample email that will be automatically generated by the system when documents are available for review.

Figure 7: Sample invitation email when a document is made available for review

6. User Types and Roles

There are two main roles in the Online Comment System:

- **Author (IPPC Official Contact Point):** The Author is the only user able to publish (submit) the final comments to the Secretariat on behalf of his or her organization. The Author can also authorize a Deputy Author who can perform all the actions of the Author, excluding publishing the final comments to the Secretariat. The Secretariat only manages the Author account.
- **Reviewer:** Reviewers can add comments and propose changes to documents. The system allows up to three reviewers for each organization. The Author or Deputy Author (not the Secretariat) manages the Reviewer accounts.

7. Creating user accounts and assigning users in your organization to a role

The Secretariat manages only the Author (or IPPC Official Contact Point) account for each organization. It is the responsibility of the Author to manage the accounts of the optional Deputy Author and three optional Reviewers.

To create these user accounts, the Author or Deputy Author must first login to the system. In the upper right corner of the system home page, ensure the Author login is displayed as

'Logged in as: "User Full Name" in Workgroup'. You should then see a drop down selection with IPPC and below that another group. Select the group below IPPC (see Figure 8). Next, select the 'Admin' tab, and select the link 'users'. Next, select 'Add new user' (Figure 9). Enter the user details and ensure you assign the user a role, such as reviewer. Select 'OK' to save your changes (Figure 10).

Figure 8: Indicating where the Author or Deputy Author should confirm they are in the correct workgroup

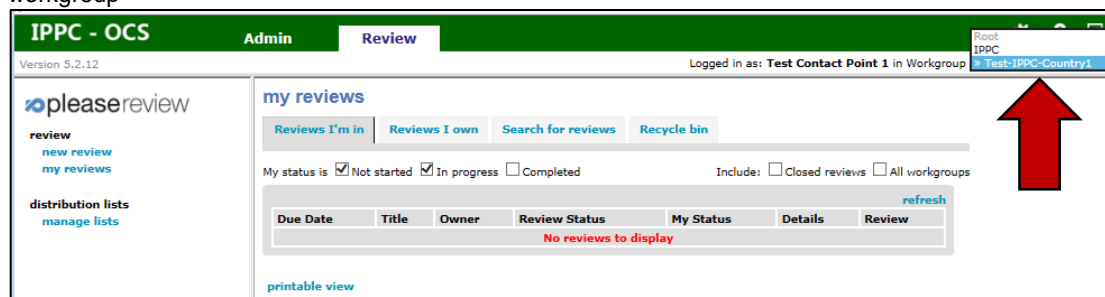


Figure 9: Indicating the location of the 'Admin' tab, 'users' link, and 'Add new user' button

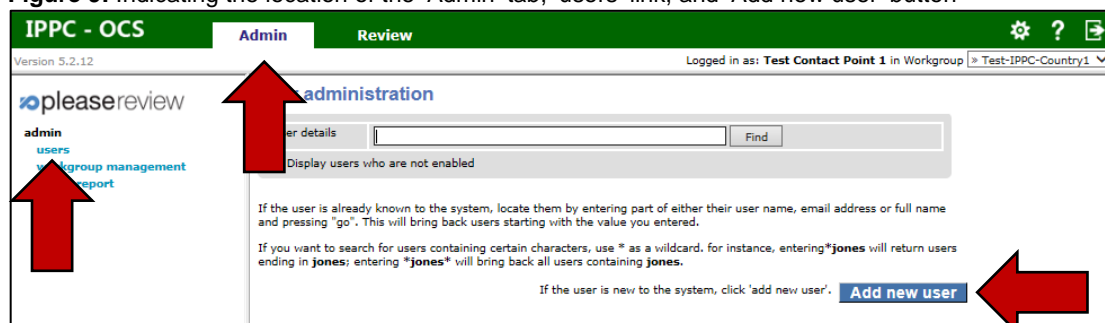
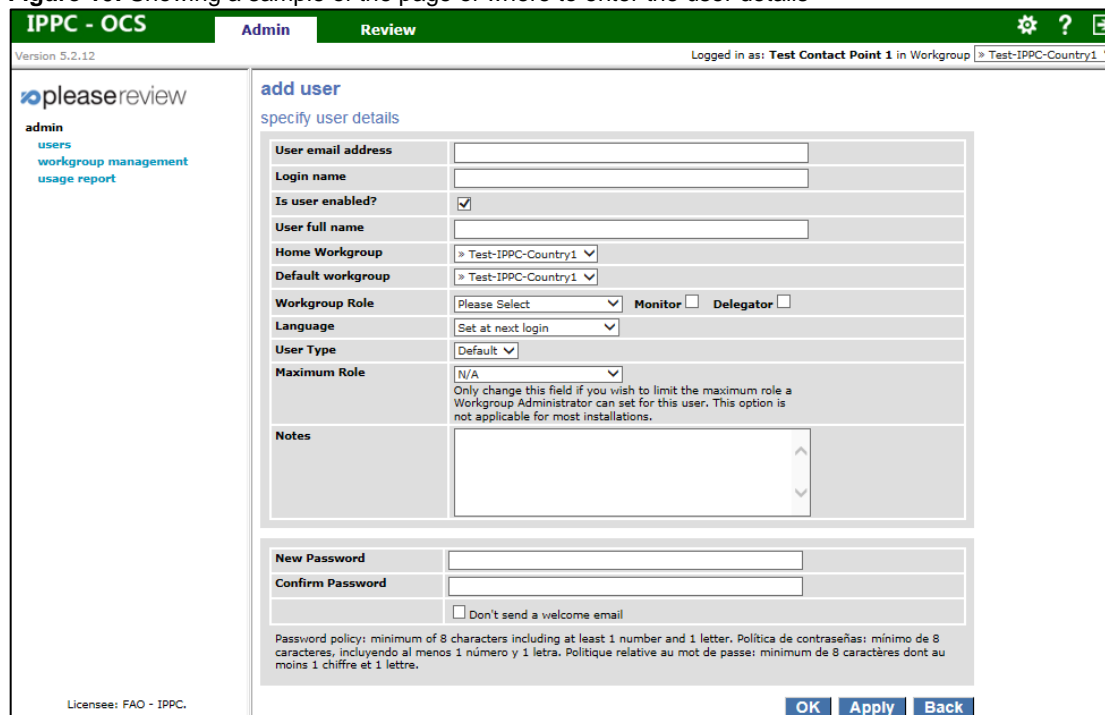


Figure 10: Showing a sample of the page of where to enter the user details



Each organization is allowed a maximum of five user accounts: one Author, one Deputy Author and three Reviewers. Authors and Deputy Authors can manage the accounts. First, in the upper right corner of the system home page, ensure the Author login is displayed as 'Logged in as: "User Full Name" in Workgroup'. You should then see a drop down selection

with IPPC and below that your group. Select the group below IPPC (see Figure 8). To manage how many user accounts you have, select the 'Admin' tab, and select the 'license' link (Figure 11). The number to the right of 'Total Available' will display how many user accounts you can assign (Figure 12).

Figure 11: Indicating the location of the 'Admin' tab and the 'license' link

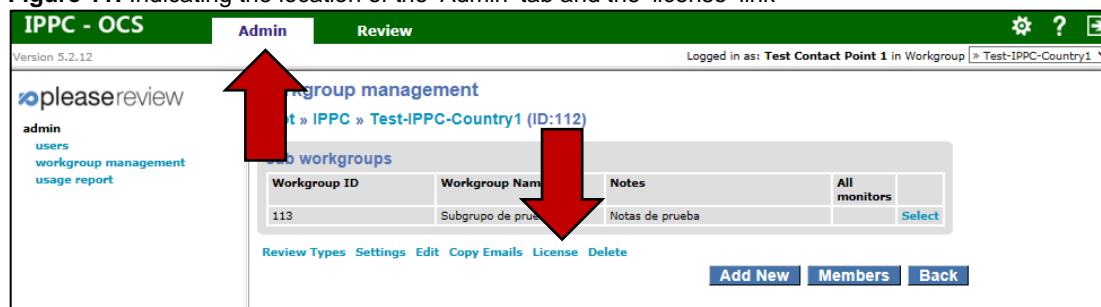


Figure 12: Indicating the location of the number of user accounts available to assign, indicating four users are available to assign

License management

Root » IPPC » Afghanistan (ID:225)

Current Workgroup				
License Used		Sub License (ID: 211)		
Workgroup		Afghanistan		
Available License	License Type	Licensed	In Use	Available
Standard	Named	3	0	3
Enhanced	Named	0	0	0
Power	Named	1	0	1
			Total Available	4

Back

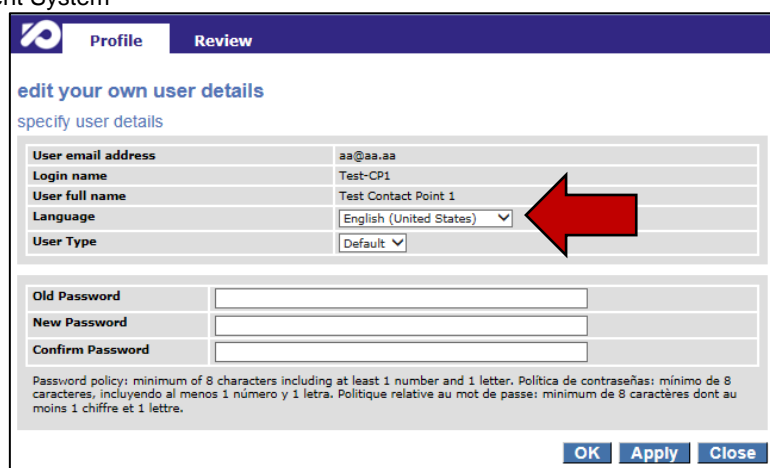
8. Accessing your profile settings and user preferences

User details can be accessed by selecting the 'user settings' icon (Figure 3). Next, select the 'profile' tab in the user details window (Figure 4).

To change your password, select the 'user settings' icon (Figure 3). Next, select the 'profile' tab in the user details window (Figure 4). Then, under 'user details', enter your old password, the new password you would like to use, and re-enter the new password again in the 'confirm password' field (Figure 5). Select 'OK' to save your changes.

To change the default language for the entire system, select the 'user settings' icon (Figure 3). Next, select the 'profile' tab in the user details window (Figure 4). Then, under 'user details', select the default language you would like displayed (Figure 13). Select 'OK' to save your changes.

Figure 13: Indicating where on the 'profile tab' to change the default language for the entire IPPC Online Comment System



Profile **Review**

edit your own user details

specify user details

User email address	aa@aa.aa
Login name	Test-CP1
User full name	Test Contact Point 1
Language	English (United States) ▼
User Type	Default ▼

Old Password

New Password

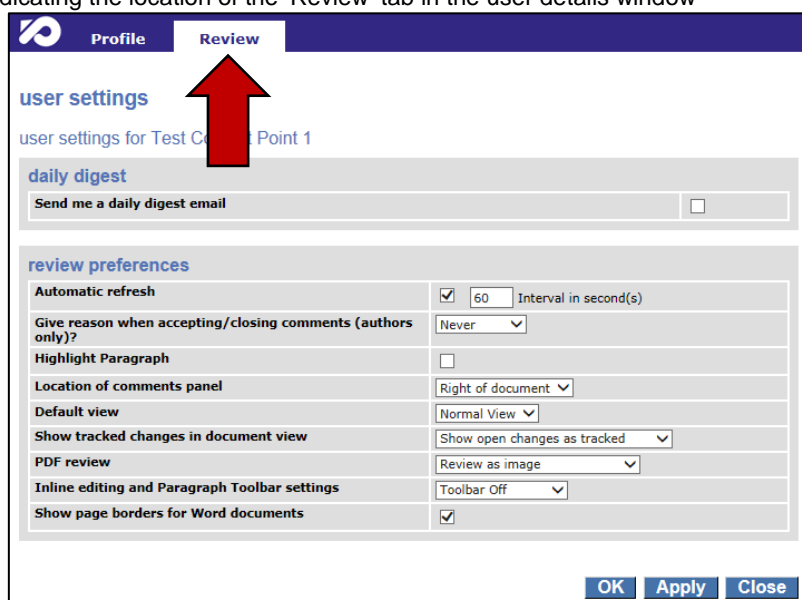
Confirm Password

Password policy: minimum of 8 characters including at least 1 number and 1 letter. Política de contraseñas: mínimo de 8 caracteres, incluyendo al menos 1 número y 1 letra. Politique relative au mot de passe: minimum de 8 caractères dont au moins 1 chiffre et 1 lettre.

OK **Apply** **Close**

To change your review preferences, select the 'user settings' icon (Figure 3). Next, select the 'review' tab (Figure 14). Then, under 'user settings', make modifications based on your review preferences (see also Figure 14). Select 'OK' to save your changes.

Figure 14: Indicating the location of the 'Review' tab in the user details window



Profile **Review**

user settings

user settings for Test Contact Point 1

daily digest

Send me a daily digest email ☐

review preferences

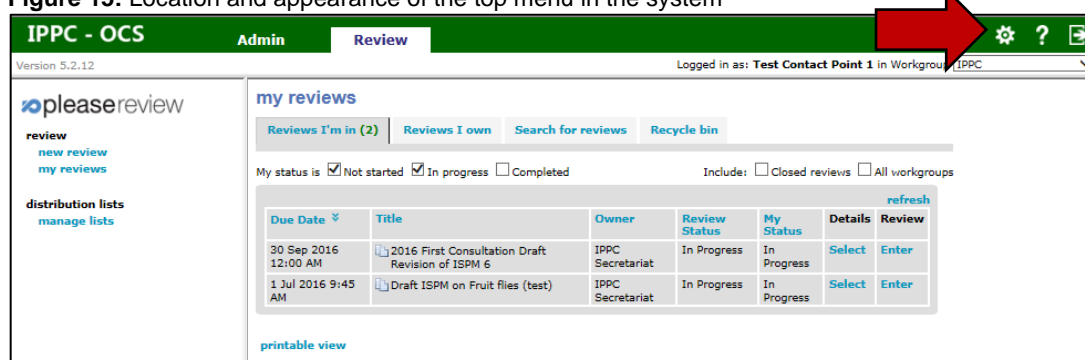
Automatic refresh	<input checked="" type="checkbox"/> 60 Interval in second(s)
Give reason when accepting/closing comments (authors only)?	Never ▼
Highlight Paragraph	<input type="checkbox"/>
Location of comments panel	Right of document ▼
Default view	Normal View ▼
Show tracked changes in document view	Show open changes as tracked ▼
PDF review	Review as image ▼
Inline editing and Paragraph Toolbar settings	Toolbar Off ▼
Show page borders for Word documents	<input checked="" type="checkbox"/>

OK **Apply** **Close**

9. Quick navigation in the system

The top menu allows for quick navigation within the system (Figure 15 and Table 2).

Figure 15: Location and appearance of the top menu in the system



IPPC - OCS **Admin** **Review**

Version 5.2.12 Logged in as: Test Contact Point 1 in Workgroup IPPC

my reviews




Reviews I'm in (2) Reviews I own Search for reviews Recycle bin

My status is ☒ Not started ☒ In progress ☐ Completed Include: ☐ Closed reviews ☐ All workgroups [refresh](#)

Due Date ▼	Title	Owner	Review Status	My Status	Details	Review
30 Sep 2016 12:00 AM	2016 First Consultation Draft Revision of ISPM 6	IPPC Secretariat	In Progress	In Progress	Select	Enter
1 Jul 2016 9:45 AM	Draft ISPM on Fruit flies (test)	IPPC Secretariat	In Progress	In Progress	Select	Enter

[printable view](#)

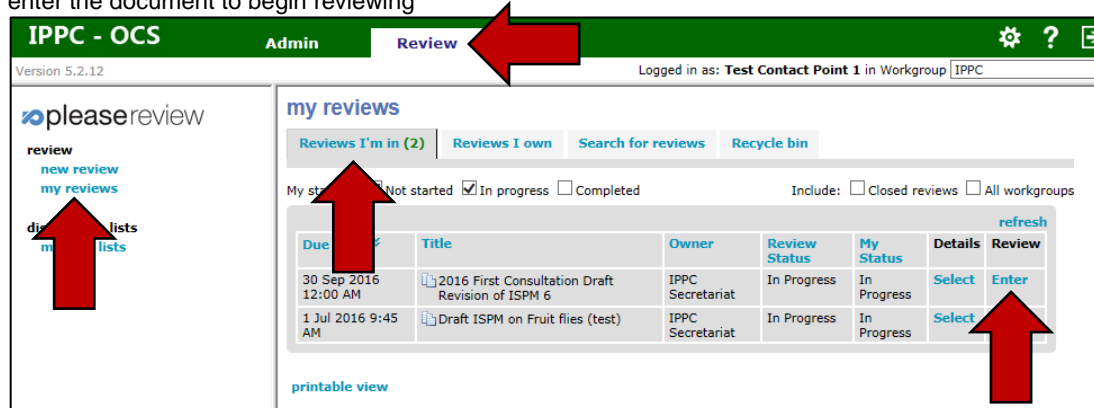
Table 2: Provides a view of the icons in the top menu and a brief description of the action taken when the icon is selected

Icon	Description
	Access to the comprehensive Help website
	Opens the user settings window
	Logs the user out of the system or exits the review area

10. Accessing documents for review



To access documents for review, first login to the system. Then select the 'Review tab', then 'my reviews'. Select the 'Reviews I'm in' tab. This will display the table of all the documents available for you to review (Figure 16). You should then see a drop down selection with IPPC and below that another group. Select the group below IPPC (see Figure 8).

Figure 16: Indicating the location of the 'Review' tab, 'my reviews' link, 'Reviews I'm in' tab, and how to enter the document to begin reviewing



Looking in more detail at the 'Reviews I'm in' tab:

- 'Due Date' is the date and time you will no longer be able to comment on the document. If you need more time to comment, contact your organizations Author (IPPC Official Contact Point) or Deputy Author to grant you an extension in the system
- 'Title' is the title of the document available for comment
- 'Owner' is whoever sent the document out for comment, usually the IPPC Secretariat
- 'Review Status' is the overall status of the document, indicating whether the consultation period is in progress or has ended
- 'My Status' is the your status of commenting on this document, indicating whether you have started or finished commenting
- By selecting 'Select' under Details, you will receive a detailed overview of your commenting details on that specific document
- By selecting 'Enter' under Review, you will be taken to the commenting area for that document, where you will be able to begin commenting on the document

The review listing may be sorted by clicking on the column headers. The  or  icons indicate which column the list is currently sorted by and the direction of the sort (ascending and descending, respectively).

Under the 'Review status' column, the status options in Table 3 may be displayed. Under the 'My status' column 5, the status options in Table 4 may be displayed.

Table 3: Provides status options for each document review managed by the Secretariat and a brief description of each status

Status	Description
In Progress	The review is in progress and the scheduled due date has not passed
Overdue	The review is still open for comment, but the scheduled due date has passed
Closed	The review has been closed by the Secretariat
Completed	The review has been marked as completed by the Secretariat and is read-only for all participants

Table 4: Provides status options for your comment review for each document (managed within your organization) and a brief description of each status

Status	Description
Not Started	Reviews that you have not started. Note that other users in your organization may have not started reviewing that document.
In Progress	Reviews that you have started reviewing (i.e. entered the review to view the documents) but which you have not set your status to 'Completed'
Completed	Reviews that you have set to 'Completed', but are still open for review by you and others in your organization

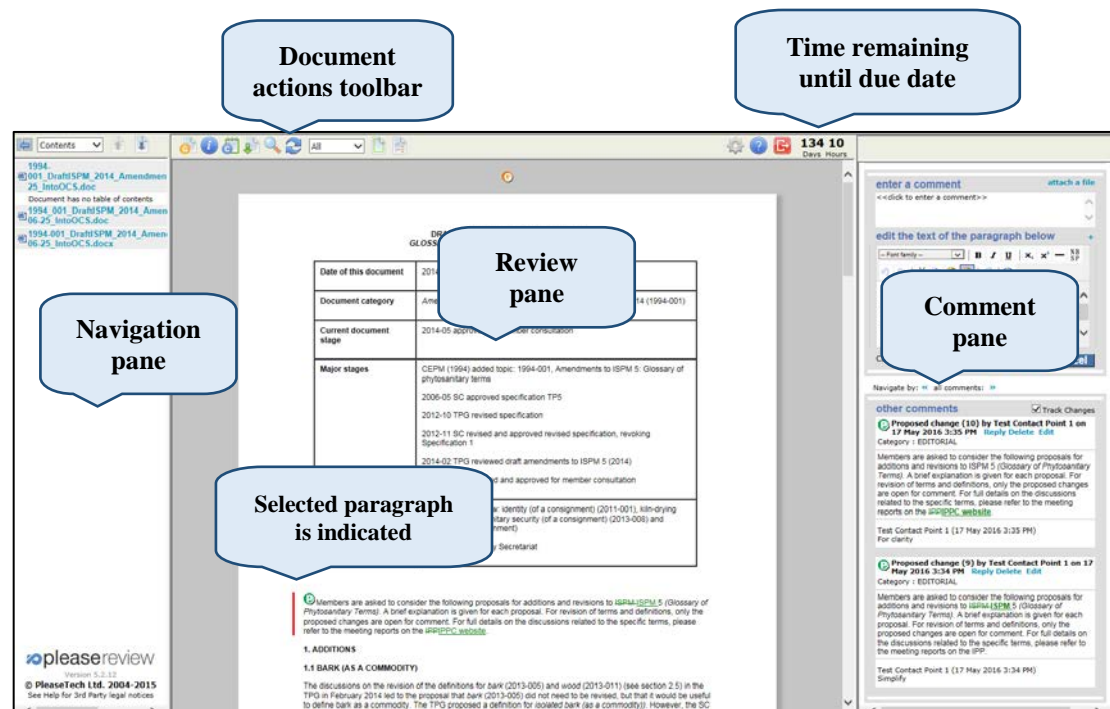
11. Overview of the comment area (document actions toolbar, navigation pane, review pane and comment pane)

To navigate to the comment area, login to the system, then select the 'review tab', then 'my reviews'. Select the 'Reviews I'm in' tab (Figure 16). This will display the table of all the documents available for you to review. Locate the document you want to comment on, then select 'Enter' to the far right (Figure 16). Next, you will be taken to the commenting area for that document.

In the commenting area, you will see the document actions toolbar, navigation pane, review pane, and comment pane (Figure 17):

- The document actions toolbar, located across the top of your screen, allows you to perform specific actions, such as searching for specific words in the document. It also displays the amount of time remaining to comment on the document.
- The navigation pane, located on the left side of your screen, allows you to choose between the different languages of the document. For example, if you started commenting in English, and want to also make comments in Spanish or French, select the different language version from the navigation pane.
- The review pane, in the center of your screen, displays any proposed changes in tracked change form: text deletions are shown as a strikethrough and additions are shown as an underline. For a quick view of your comments for each paragraph, select the 'P' in the green circle at the beginning of the paragraph.
- The comment pane, located on the right side of your screen, is where you will enter your comments and proposed changes for each paragraph.







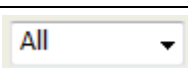
Figure 17: Indicating the location of the 'Navigation pane', 'Review pane', 'Comment pane' and 'Document actions toolbar'. Also indicates the selected paragraph and the time remaining until the due date




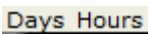


Document actions toolbar

The document actions toolbar is displayed and described in Table 5.

Table 5: Provides the icons in the Document actions toolbar and a brief description of the action taken when the icon is selected

Icon	Description
	Opens the comment window to allow a reviewer to make a general comment or view the general comments of others.
	Opens the review control panel in a new window. This is a read-only version of the review control panel and displays the information associated with the review. No actions are available from this view.
	Opens the reconciliation report in a new window.
	Opens a copy of the original document. This is the same as downloading a copy of the document from the IPPC website, and the standard web dialog will appear. By default the document will be 'read only'.
	Opens 'Find' in a new window. This allows the reviewer to search for specific words or phrases. All instances are displayed with their paragraph ID. Clicking on the paragraph ID takes the reviewer to that instance within the open review window.
	Refreshes the document. This will re-load the document and all comments from the server.
	The drop-down box allows you to display a selection of comments. Options are 'All', 'Open Comments' or 'Custom'.

Icon	Description
	Opens the user settings dialog where users can set their review preferences.
	Opens the online help site in a new window, which a comprehensive user manual.
	Leave the review.
	This displays the remaining time until the end of the review.

12. How to add comments and proposed changes

It is important to note that **IF NO INTERNAL REVIEW IS AVAILABLE** all comments inserted by, or shared with and later accepted by, the Author (IPPC Contact Point) are automatically sent to the IPPC Secretariat when the commenting period is over. The Author does not need to manually publish (submit) the comments to the Secretariat.

If an internal review is available, the Author must manually select the “Publish” icon at the top of the screen in the Document actions toolbar. Otherwise, the comments **WILL NOT BE PUBLISHED** (submitted) to the IPPC Secretariat.

General comments

To enter a general comment (broad in scope and not based on a specific paragraph), go to the document actions toolbar and select the 'general comments' icon (Figure 18). In the comment pane, under 'enter a comment', provide your comment, or justification, for your proposed change. Next, select the category for your comment: editorial, substantive, technical, or translation from the drop down menu. Select 'Apply' to save your changes (Figure 19). You will now see your general comment at the top of the review pane. For a quick view of your general comment, select the 'G' in the orange circle at the top of the review pane.

Figure 18: Indicating the location of the 'General Comments' icon on the Document actions toolbar

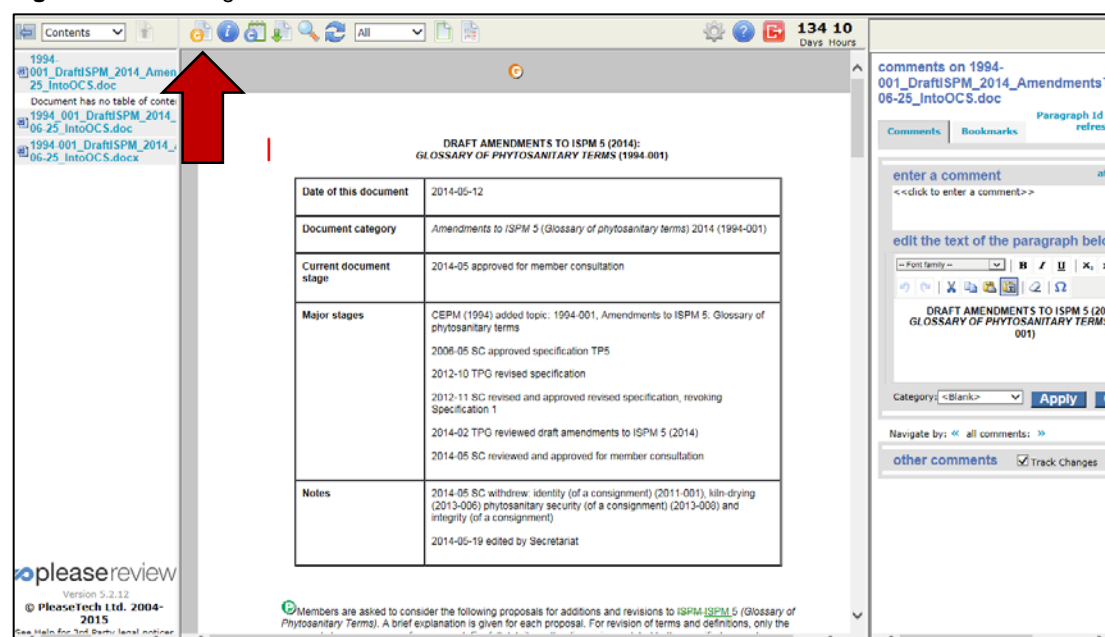
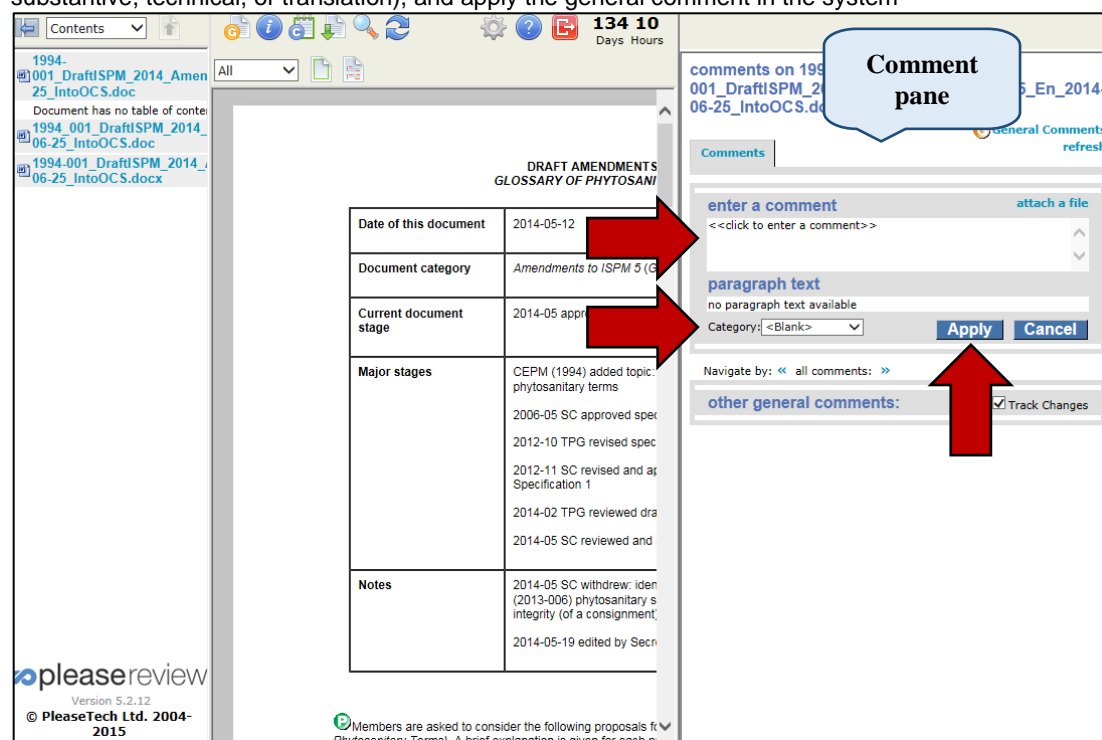


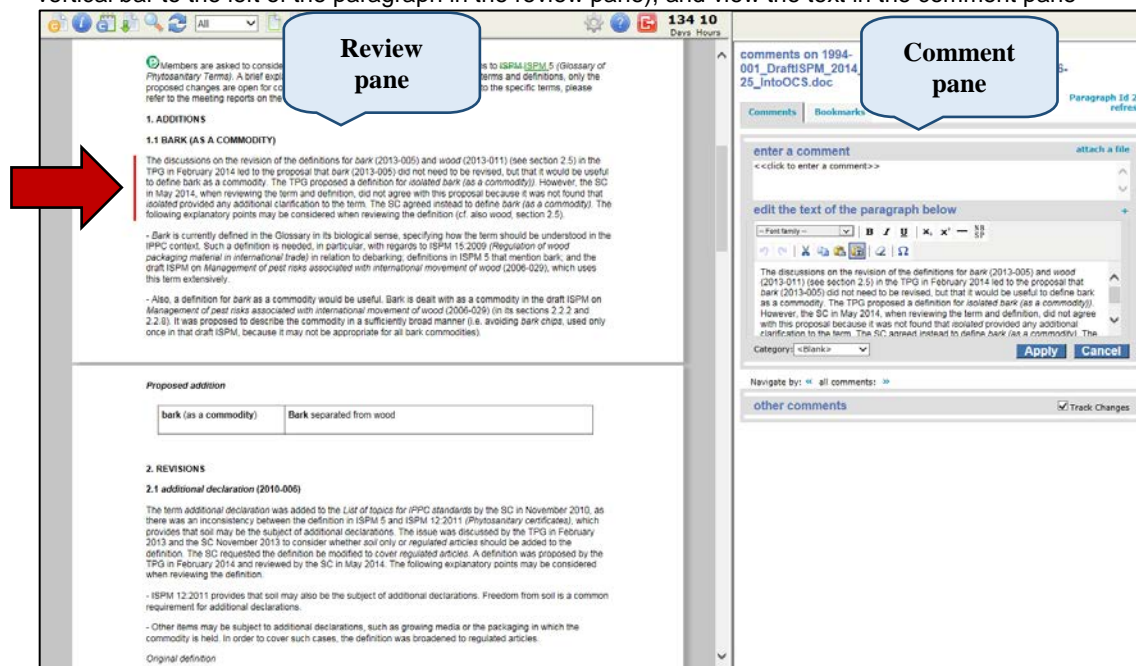
Figure 19: Indicating where to enter a general comment, select a comment category (editorial, substantive, technical, or translation), and apply the general comment in the system



Specific comments

To enter a comment, go to the review pane in the centre of your screen, locate the paragraph you want to comment on, and select the paragraph. The paragraph text will be shown in the comment pane on the right side of your screen (Figure 20).

Figure 20: Indicating where to select a paragraph in the review pane (selected text indicated by the vertical bar to the left of the paragraph in the review pane), and view the text in the comment pane



In the comment pane, under 'enter a comment' provide your comment, or justification, for your proposed change. Under 'edit the text of the paragraph below', modify the text based on your proposed change. Next, select the category for your comment: editorial, substantive,

technical, or translation (elaborated below) from the drop down menu. Select 'Apply' to save your changes (Figure 21). You will now see your comments in tracked changes in the review pane and in the comment pane (Figure 22).

Four comment categories are available:

- **Editorial:** This type of comment clarifies or simplifies the text without changing the meaning. This includes spelling or grammatical corrections, suggestions of different but equivalent words and simplification of sentence structure.
- **Substantive:** This type of comment takes into account conceptual changes and the addition of new aspects or ideas. This type of comment contains additions or extensions as well as changes, reorganization of the text or deletions resulting in alteration of the content of a sentence / paragraph / section of the draft.
- **Technical:** This type of comment takes into account scientific corrections and technical adjustments. It aims at further clarification and improvement of the standard and sometimes at conformity with other standards from the technical viewpoint.
- **Translation:** This type of comment corrects points that are considered to be inaccurately translated into another language version of the text.

Figure 21: Comment pane indicating where to enter your comment, propose your change to the text, select a comment category (editorial, substantive, technical, or translation), and apply the change in the system

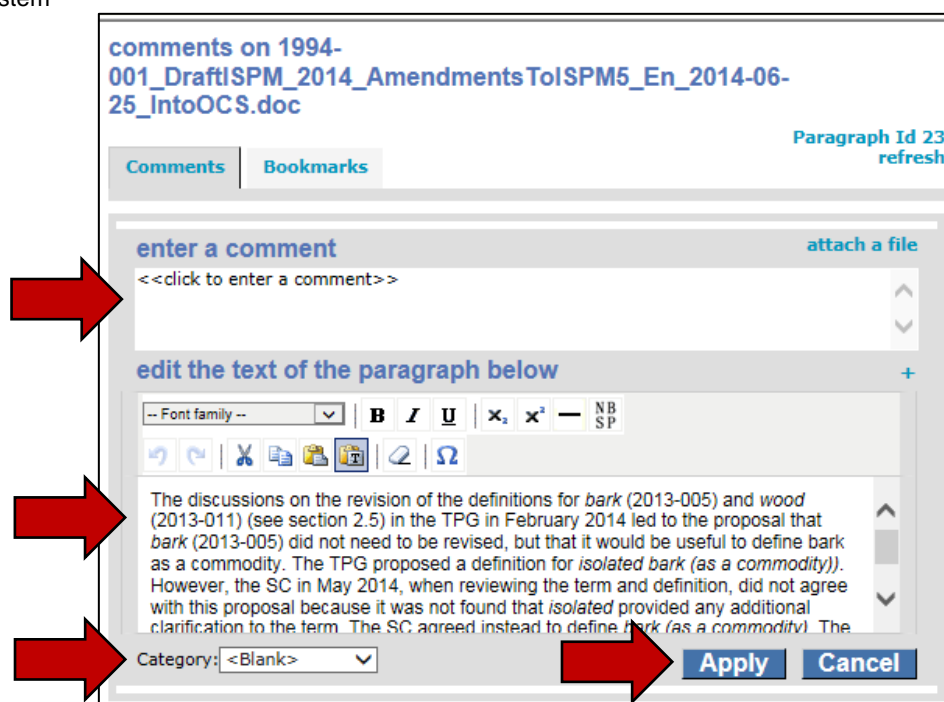
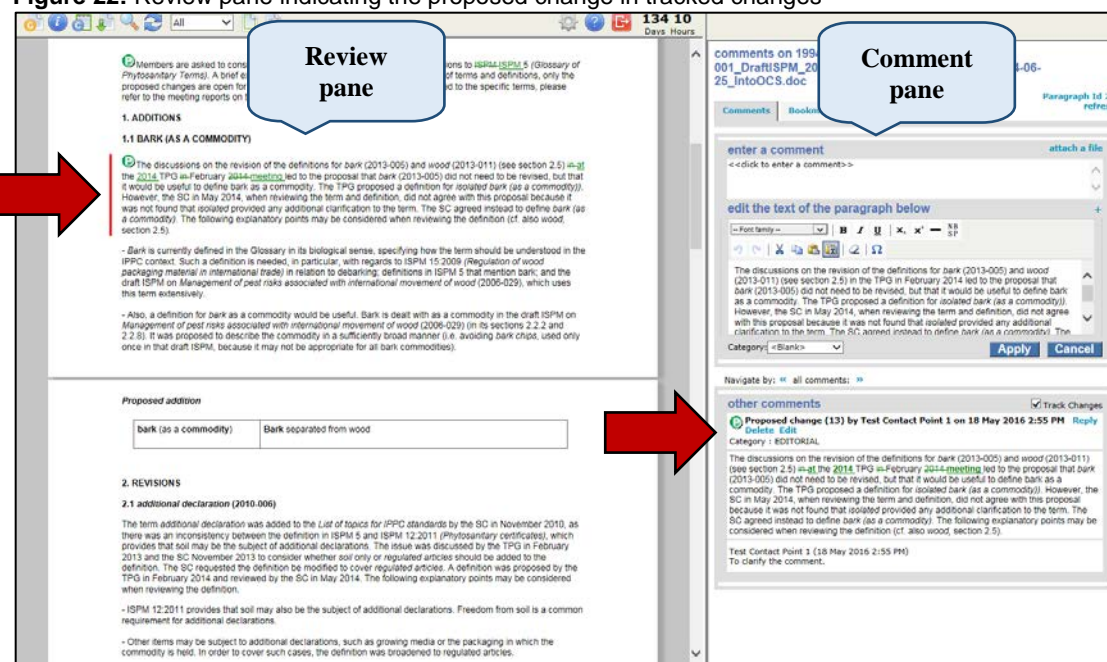


Figure 22: Review pane indicating the proposed change in tracked changes

13. Changing and deleting comments

First, login to the system, then select the 'review tab', then 'my reviews'. Select the 'Reviews I'm in' tab (Figure 16). This will display the table of all the documents available for you to review. Locate the document you want to comment on, then select 'Enter' to the far right (Figure 16). Next, you will be taken to the commenting area for that document.

To change a comment, go to the review pane, locate the paragraph that contains the comment you want to change, and select the paragraph. All of the comments for that paragraph will open in the comment pane. Locate the comment you want to change and select the 'Edit' link for that comment (Figure 23). The comment will be opened for you to modify. You can modify the comment, the proposed changes, and the comment category. Select 'Apply' to save your changes. Select 'Cancel' to not make any changes. (Figure 24)

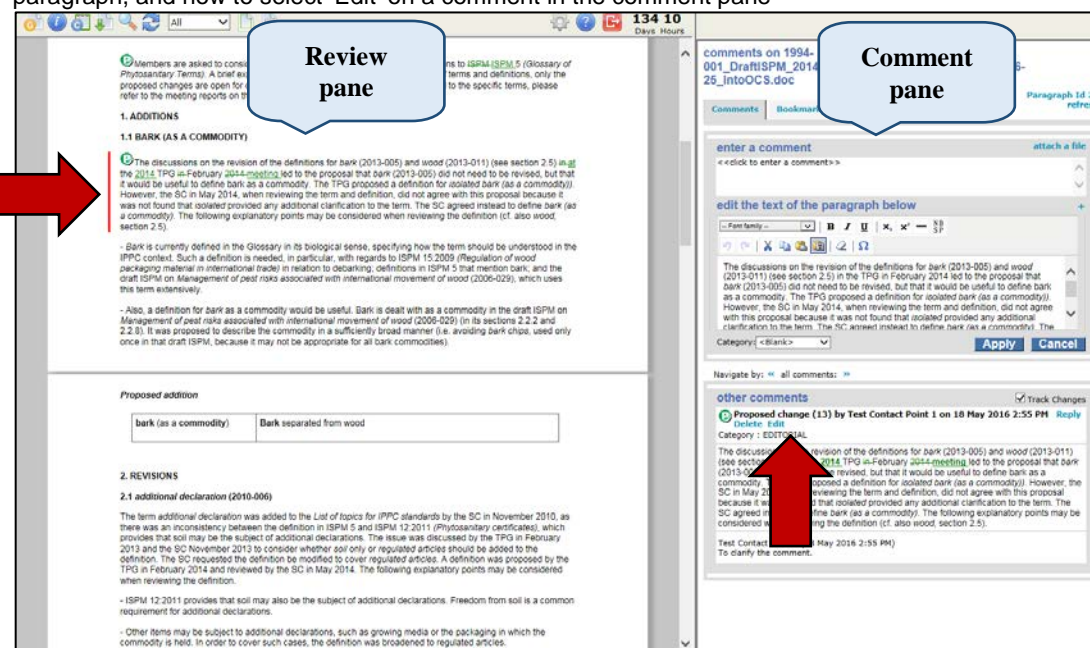
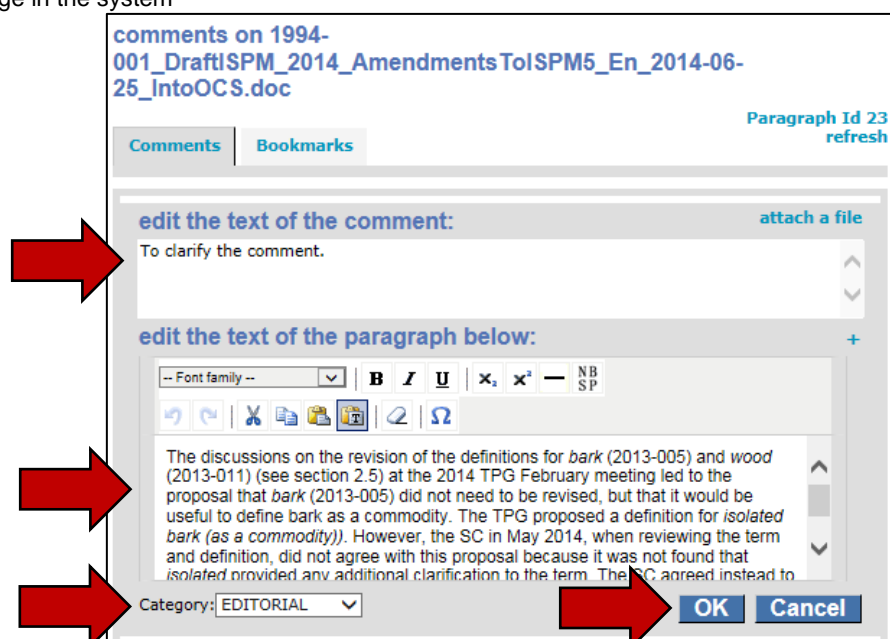
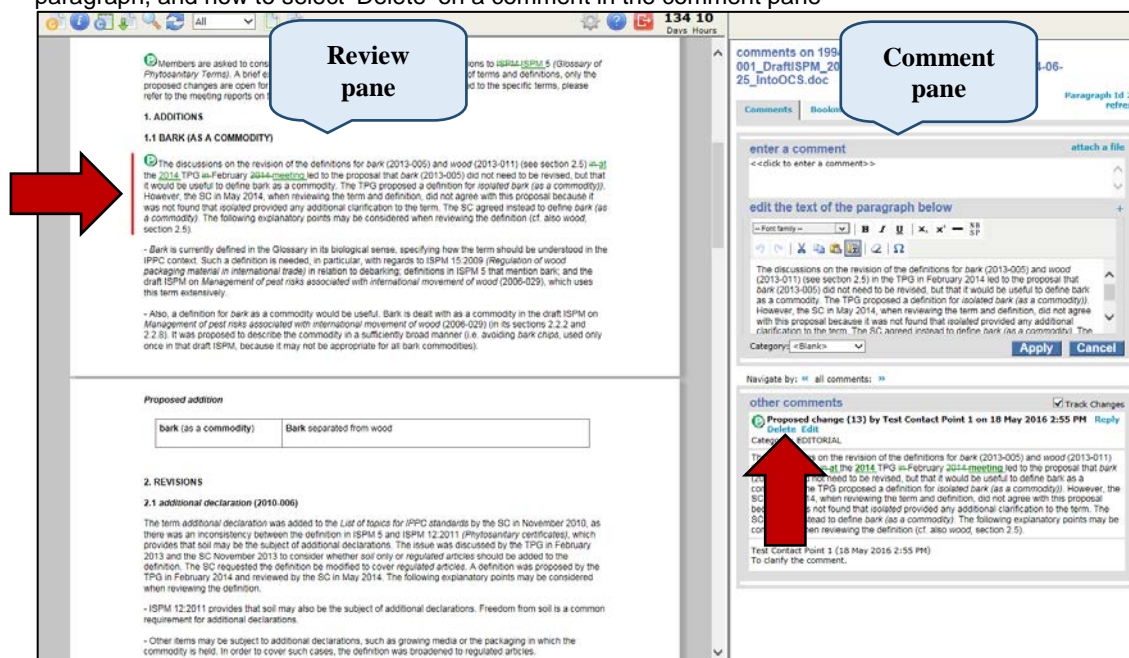
Figure 23: Indicating how to select a paragraph in the Review pane to view the comments in that paragraph, and how to select 'Edit' on a comment in the comment pane

Figure 24: Edit comment pane indicating where to edit your comment, edit your proposed change to the text, change your comment category (editorial, substantive, technical, or translation), and save your change in the system



To delete a comment, go to the review pane in the centre of your screen, locate the paragraph that contains the comment you want to delete, and select the paragraph. All of the comments for that paragraph will open in the comment pane on the right side of your screen. Locate the comment you want to delete and select the 'Delete' link for that comment (Figure 25). The system will ask you to confirm whether you want to delete the comment. Select 'yes' to delete the comment.

Figure 25: Indicating how to select a paragraph in the Review pane to view the comments in that paragraph, and how to select 'Delete' on a comment in the comment pane



14. Leaving the review

When you have finished commenting on a review, select the 'leave the review' icon (see Table 5). The 'finish review' window will appear where you can update your participant

status (Figure 26) and have it recorded in the control panel. Select your status (see Table 6) using one of the radio buttons provided. You can also enter summary comments in the space provided and choose to set up email notifications when there is activity during the review. When you are done, select 'OK'. (Figure 26)

Figure 26: Indicating how to update your participant status when you have finished your review, including selecting your participant status, entering a summary comment, and setting email notifications

finish review

update your participant status

Select a value to indicate your status to the author

☐ Not started ☒ In progress ☐ Completed ☐ Offline

Enter an optional summary comment to appear on the author's review status page

Summary comments entered here

Send me an email notifying me when there is activity on:

any paragraph

OK

Table 6: Participant status options for the 'finish review' window

Review Status	Description
In progress	The Reviewer has started reviewing the document. This status is set automatically by the system once you enter the review for the first time. On leaving the review you have the option to leave your status as 'In progress' or to indicate that you have completed your review by selecting 'Completed'.
Completed	The Reviewer has indicated that they have completed their review of the document. The Reviewer can return to the review and comment at any time (regardless of this setting) until the Secretariat has 'Closed' the review.

The summary comments are displayed in the review control panel and in the comment reconciliation report. Note that the Author's participant status remains 'In progress' when the review is open and 'Completed' when the review is closed.

15. Review control panel

The review control panel summarizes the review for a document, including the participants involved in that review, and your status within the review, and an overview of your comments. You can also take certain actions from the review control panel, such as:

- viewing reports
- entering the review
- creating a sub-review
- updating your participant status
- downloading a copy of the draft document (original with or without your comments)
- delegating
- and a feature to access the email address of all workgroup participants in your review

To access the review control panel, login to the system, then select the 'Review tab', then 'my reviews'. Select the 'Reviews I'm in' tab. This will display the table of all the documents available (Figure 16). Next, locate the document you want to access the review control panel, then select then choose 'Select' in the Details column for that document (Figure 27). This will open the review control panel (Figure 28).

Figure 27: Indicating the location of the 'Details' link, which will open the review control panel

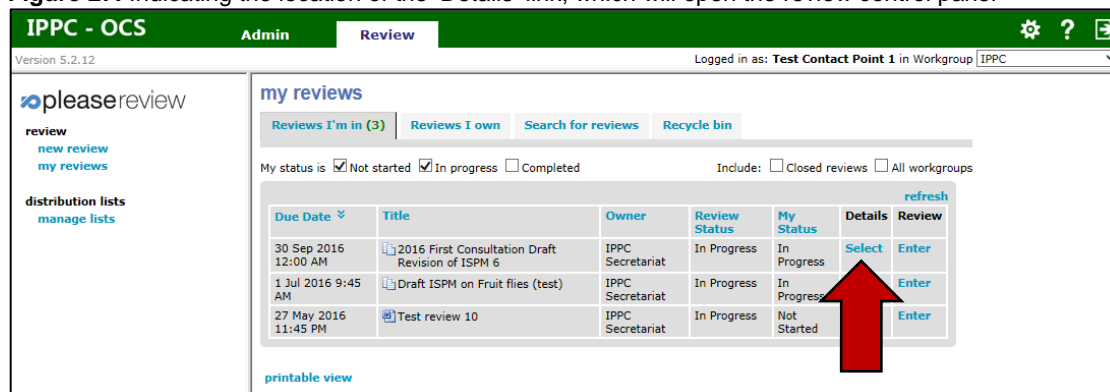
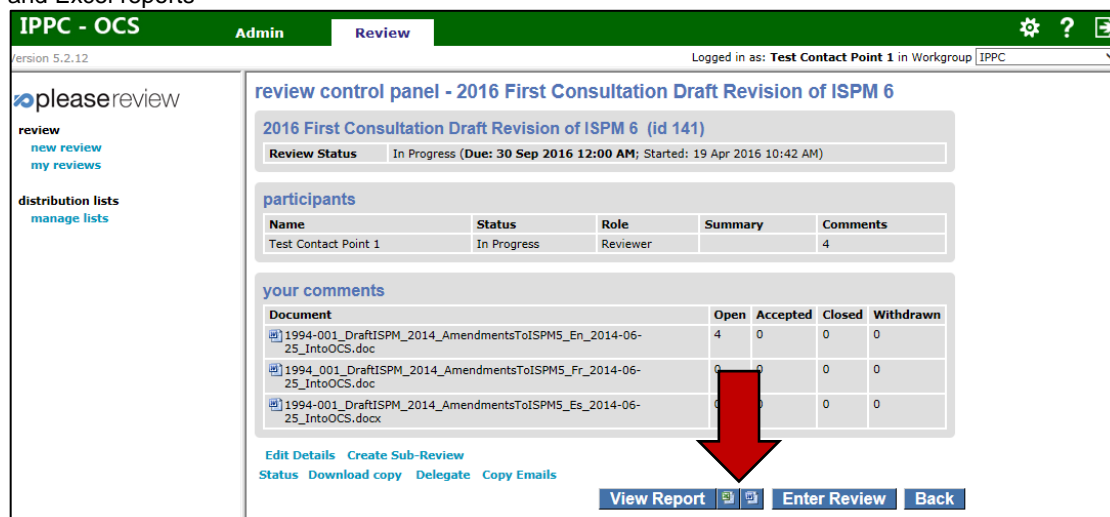




Figure 28: Showing the Review control panel, and indicating where to download quick Microsoft Word and Excel reports



16. Reports

The IPPC Online Comment System allows you to download various types of reports, which contain summary information on the review and all comments for the document.

To produce reports, login to the system, select the 'Review tab', then 'my reviews'. Next, select the 'Reviews I'm in' tab. This will display the table of all the documents available (Figure 16). Next, locate the document you want to access the review control panel, then select then choose 'Select' in the Details column for that document (Figure 27). This will open the review control panel (Figure 28).

To run a quick, complete report in Microsoft Word or Excel, go to the review control panel (Figure 28), and select the Excel icon  to download the report as an Excel document or the Word icon  to download the report as a Word document and follow the prompts on your screen.

To run more customized reports, login to the system, select the 'Review tab', then 'my reviews'. Next, select the 'Reviews I'm in' tab. This will display the table of all the documents available (Figure 16). Next, locate the document you want to access the review control panel,

then select then choose 'Select' in the Details column for that document (Figure 27). This will open the review control panel (Figure 28). Select 'View Report' (Figure 28) to open the report window. The first table in the report window (Figure 29) shows the summary of the document under review, including the end date of the review and the user's current review status. The second table in the report window lists the participants in the review, including their status, role, and number of comments entered to date. The third table in the report window lists the comments on the draft, indicating the paragraph number, the original paragraph text, the comment type, the comment with proposed change, the comment status, and the Author (Contact Point) comment.

Figure 29: Showing the report window, and indicating the select comments button, summary, participants, and comment summary tables

report for review 2016 First Consultation Draft Revision of ISPM 6
 report generated for Test Contact Point 1 on 20 May 2016 1:37 PM
 summary

Title	2016 First Consultation Draft Revision of ISPM 6 (Id 141)
Description	
End Date	30 Sep 2016 12:00 AM
Review Status	In Progress

participants

Name	Status	Role	Summary	Comments	Last Activity
Test Contact Point 1	In Progress	Reviewer		4	20 May 2016 11:59 AM

T (Type) - B = Bullet, C = Comment, P = Proposed Change, R = Rating
 S (Status) - A = Accepted, C = Closed, O = Open, W = Withdrawn
[download all reports](#)

[report for 1994-001_DraftISPM_2014_AmendmentsToISPM5_En_2014-06-25_IntoOCS.doc \(1994-001_DraftISPM_2014_AmendmentsToISPM5_En_2014-06-25_IntoOCS.doc\)](#)
[download document with paragraph numbers](#) [download report as word](#)

Para	Text	T	Comment	S	Author Comment
G	(General Comment)	C	Comment (12) by Test Contact Point 1 on 18 May 2016 2:43 PM Category : TECHNICAL Test Contact Point 1 (18 May 2016 2:43 PM) The Country of ABC thinks the TPPT should review some of these terms	O	
20	Members are asked to consider the following proposals for additions and revisions to ISPM 5 (<i>Glossary of Phytosanitary Terms</i>). A brief explanation is given for each proposal. For revision of terms and definitions, only the proposed changes are open for comment. For full details on the discussions related to the specific terms, please refer to the meeting reports on the IPP.	P	Proposed Change (10) by Test Contact Point 1 on 17 May 2016 3:35 PM Category : EDITORIAL Members are asked to consider the following proposals for additions and revisions to ISPM 5 (<i>Glossary of Phytosanitary Terms</i>). A brief explanation is given for each proposal. For revision of terms and definitions, only the proposed changes are open for comment. For full details on the discussions related to the specific terms, please refer to the meeting	O	

To customize the report, choose 'Select Comments' (Figure 29), which will open a new window (Figure 30). This will allow you to customize the report to include and exclude various comments. Note that all comments are shown by default. After you have customized your report, select 'OK'.

Figure 30: Showing the window in which you can customize your report

Select comments by:

Document	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> TestForNewIPPCOCS-2_EN.doc																																																	
Status	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Closed <input checked="" type="checkbox"/> Accepted <input checked="" type="checkbox"/> Open																																																	
Type of comment	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> General <input checked="" type="checkbox"/> Comment <input checked="" type="checkbox"/> Proposed Change																																																	
Comment category	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> <Blank> <input checked="" type="checkbox"/> EDITORIAL <input checked="" type="checkbox"/> SUBSTANTIVE <input checked="" type="checkbox"/> TECHNICAL <input checked="" type="checkbox"/> TRANSLATION																																																	
Participant	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> APPPC <input checked="" type="checkbox"/> Cook Islands <input checked="" type="checkbox"/> Eppo <input checked="" type="checkbox"/> IPPC Secretariat <input checked="" type="checkbox"/> Jamaica <input checked="" type="checkbox"/> New Zealand <input checked="" type="checkbox"/> United States of America <input checked="" type="radio"/> Made a comment <input type="radio"/> Participated in discussion																																																	
Date	<input checked="" type="radio"/> All <input type="radio"/> Since I viewed the reconciliation report 27 May 2016 6:11 PM ▼ <input type="radio"/> Since: date : time : 00 00 <div style="border: 1px solid black; padding: 2px; margin-top: 5px;"> <div style="text-align: center;">May 2016</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th></tr> <tr> <td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td></tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr> <td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td></tr> </table> </div>	Sun	Mon	Tue	Wed	Thu	Fri	Sat	24	25	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4
Sun	Mon	Tue	Wed	Thu	Fri	Sat																																												
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8	9	10	11	12	13	14																																												
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22	23	24	25	26	27	28																																												
29	30	31	1	2	3	4																																												
Show Track Changes	<input checked="" type="checkbox"/> Show Proposed Changes as tracked																																																	

[Return to default](#)

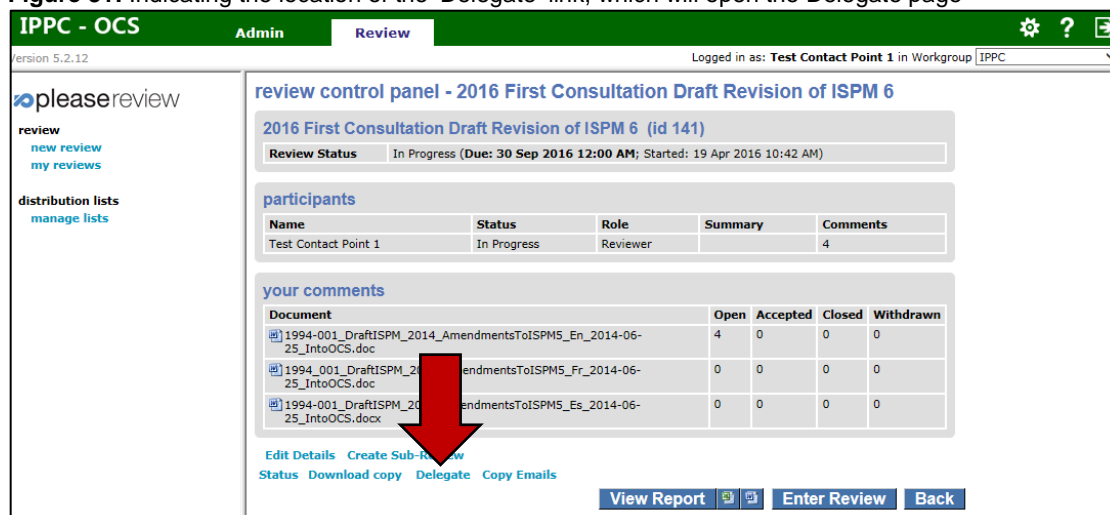
To download the document as a Microsoft Word file, select the link ‘download report as word’ and follow the prompts on your screen.

You can also download the document with paragraph numbers. In this version, the paragraphs each have a paragraph number added in square brackets to and coloured blue - for example [1], [2]. This allows you to match the comment paragraph in the report to its exact location in the document. To download the paragraph numbers document, select the link ‘download document with paragraph numbers’ and follow the prompts on your screen (Figure 29).

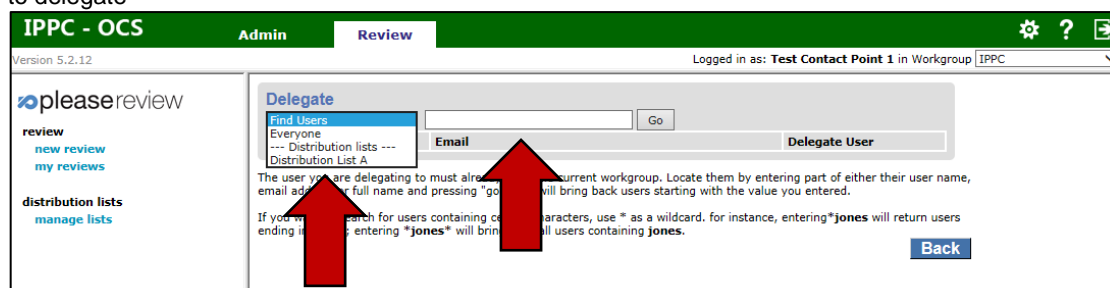
17. Delegation

Authors (IPPC Official Contact Points) can delegate their role on the review to a Deputy Author. Note that the Deputy Author can do all of the actions of the Author, excluding submitting the final comments to the IPPC Secretariat.

To delegate, the Author must login, then select the 'Review tab', then 'my reviews'. Select the 'Reviews I'm in' tab. This will display the table of all the documents available (Figure 16). Next, locate the document you want to choose a Delegate, then select then choose ‘Select’ in the Details column for that document (Figure 27). This will open the review control panel. To delegate a Deputy Author for this document, select the ‘Delegate’ link (Figure 31).

Figure 31: Indicating the location of the 'Delegate' link, which will open the Delegate page

In the Delegate screen, you can search for users individually or display all available users in your Workgroup. The user you are delegating must already be in the current workgroup. To find users to delegate, you can use the dropdown menu or use the search field (Figure 32). When using the search field, locate users by entering part of either their user name, email address or full name and select 'Go'. This will list the users starting with the value you entered. If you want to search for users containing certain characters, use (*) as a wildcard. For example, entering (*jones) will return users ending in 'jones'; entering (*jones*) will bring back all users containing 'jones'.

Figure 32: Indicating the location of the drop down menu and the search field where you can find users to delegate

Locate the user you want to delegate the role of Deputy Author and choose 'Select' next to his or her name (Figure 33). Next, confirm the user you selected and provide special instructions (optional). Selection 'OK' to confirm the selection of the Delegate (Figure 34). **It is important to note that once you have completed the delegation, you will not be able to reverse it and will no longer be active in the review for this document. Your status in this review will be set to 'Completed'.**

Figure 33: Indicating how to select a user to delegate in the Delegate window

IPPC - OCS Admin Review

Version 5.2.12 Logged in as: Test Contact Point 1 in Workgroup IPPC

please review

review
new review
my reviews

distribution lists
manage lists

Delegate

Everyone

Name	Email	Delegate User
Argentina Republic	dquiroga@senasa.gov.ar	Select
Asia and Pacific Plant Protection Commission	yongfan.piao@fao.org	Select
Canada	marie-claude.forest@inspection.gc.ca	Select
European Plant Protection Organization	lucchesi@epo.int	Select
Islamic Republic of Iran	director@ppo.ir	Select
Jamaica	syharvey@moa.gov.jm	Select
Japan	ippc_contact@maff.go.jp	Select
Mirko Test	mirko.montuori@fao.org	Select
New Zealand	John.Hedley@mpi.govt.nz	Select
People's Democratic Republic of Algeria	hadjeres.nadia@minagri.dz	Select
Republic of Yemen	plant-protection@yemen.net.ye	Select
South Africa	nppoza@daff.gov.za	Select
United Kingdom of Great Britain and Northern Ireland	sam.bishop@defra.gsi.gov.uk	Select
United States of America	Stephanie.M.Dubon@aphis.usda.gov	Select

The user you are delegating to must already be in the current workgroup. Locate them by entering part of their user name, email address or full name and pressing "go". This will bring back users starting with the value you entered.

If you want to search for users containing certain characters, use * as a wildcard. for instance, entering *j will return users ending in jones; entering *jones* will bring back all users containing jones.

Back

Figure 34: Indicating where to enter special instructions and to confirm the delegate

IPPC - OCS Admin Review

Version 5.2.12 Logged in as: Test Contact Point 1 in Workgroup IPPC

please review

review
new review
my reviews

distribution lists
manage lists

delegate to participant

Name: United States of America

Email: Stephanie.M.Dubon@aphis.usda.gov

Special Instructions

Warning: once you have completed the delegation, you will not be able to reverse it and will no longer be active in this review. Your status in this review will be set to 'Completed'.

OK Back

18. Optional internal review

Authors or Deputy Authors have the option to coordinate the internal review of documents, which the system calls a 'sub-review'.

To create a sub-review, first login to the system. Then select the 'Review tab', then 'my reviews'. Select the 'Reviews I own' tab (Figure 35). You should then see a drop down selection with IPPC and below that another group. Select the group below IPPC (see Figure 8). Locate the document in which you want to create a sub-review. Under the 'Details' column to the far right of that document, choose the link 'Select' (Figure 35). You will be taken to the review control panel, where you will select the 'Create Sub-Review' link' (Figure 36). Next, you will be asked to confirm whether you want to create a sub-review. Select 'OK' to continue.

You will be asked to follow a series of steps to set up the review (Figure 37). Step 1 is to specify the review details, such as the title, type and dates for the review:

- Title: The system will automatically fill in the document title with '[Sub-review]' at the end. You can modify the title as you wish
- Description: You can add any description you wish
- Review Type: The options are None, Default, Poll, and Question. If you want to simply gather comments on a document, set the review type as 'Default'
- Review Flow: Leave unchecked
- End Date: Set this as the date you want your reviewers to provide comments to you. Make sure you leave enough time to review their comments and submit your organizations final comments to the IPPC Secretariat

When you completed the review details, select 'Next' (Figure 37).

Step 2 is to upload documents (optional, Figure 38). If you do not want to upload any documents, select 'Next' to go to the next step. The first table will indicate documents already uploaded for the review (such as the draft standard). You can upload additional documents here for your reviewers to consider, such as journal articles. To upload a document, select 'Browse...', and locate the file on your computer. You can change the title of the file as displayed in the table by modifying it to the right of the 'Title' field. If you want the system to recognize the Table of Contents (TOC) levels in your Word document, indicate whether you have 'None' or 'All'. Finally, indicate whether your document is a reference or feedback document. When finished, select 'Upload'. Repeat for each document. When you are finished uploading documents, select 'Next' to go to the next step.

Step 3 is to specify the participants you want for your sub-review (Figure 39). The first table will indicate users already involved in the review (such as the Author and Deputy Author). The second table is where you can search for users. Use the drop-down menu to search for reviewers. For example, to search for a specific user, select 'Find Users' from the drop-down menu and search using their name, then select 'Go'. Or, you can select 'Everyone' from the drop-down menu, then select 'Go' to see a list of all users available to you. Once you have identified the user you want to add to the sub-review, select the check-box next to their name, and identify whether you want them to be a 'reviewer' or 'viewer' on the draft (Figure 40), then select 'Add' to add them to the list of reviewers for your sub-review. Note that a 'viewer' cannot enter comments on the documents. Now you will see these newly added reviewers and viewers added to the first table on the Step 3 window. After you have added all your users, select 'Next'.

Step 4 provides you with options for the review (Figure 41). Carefully review each option and determine which options you want to incorporate into your review. When you have finished selecting your options, select 'Next'.

Step 5 of the review is to verify the details of your sub-review and either start the sub-review or put it on hold (Figure 42). Review the details of the sub-review. You can edit the details of the sub-review by selecting 'Edit' next to each of the elements. If you are ready to begin the sub-review, select 'Start Review'. If you want to start the sub-review later, select 'Place Review on Hold'.

Figure 35: Indicating the location of the 'Reviews I own' tab, and the location of the 'Select' link to create the sub-review

Admin Review

my reviews

Reviews I'm in **Reviews I own** Search for reviews Recycle bin

Review status is ☒ Not started ☒ In progress ☐ Closed ☐ Completed Include: ☒ All workgroups

Due Date	Review Title	Status	Details	Review
5 Jul 2016 11:45 PM	IPPC OCS Review Test 5	In Progress	Select	Enter
1 Jul 2016 11:45 PM	IPPC OCS Review Test 4	In Progress	Select	Enter
29 Jun 2016 11:45 PM	IPPC OCS Review Test 2	In Progress	Select	Enter
7 Apr 2016 11:45 PM	IPPC OCS Review Test 1	In Progress	Select	Enter
4 Apr 2016 11:45 PM	Test review 6	In Progress	Select	Enter
3 Apr 2016 11:45 PM	Test review 6 [Sub-review] aaa	Not Started	Select	Enter

refresh

printable view

Figure 36: View of the Review control panel, indicating the location of the 'Create Sub-Review' link

review control panel - Test review 6

Test review 6 (id 137)

Review Status In Progress (Due: 4 Apr 2016 11:45 PM; Started: 23 Mar 2016 10:54 AM) [Extend deadline](#)

participants

Name	Status	Role	Summary	Comments
Cook Islands	Not Started	Reviewer		0
IPPC Secretariat Σ	Review Owner	Owner		0

comment summary

Document	Open	Accepted	Closed	Withdrawn
Test review 6 En	0	0	0	0
Test review 6 Es	0	0	0	0
Test review 6 Fr	0	0	0	0

Printable View Show URLs Email Status Edit Details Delete Review **Create Sub-Review** Status Download copy Copy Emails

View Report **Enter Review** **Review Closeout** **Back**

Figure 37: Creating a Sub-Review Step 1: Specifying review details

IPPC - OCS Admin Review Logged in as: IPPC Secretariat in Workgroup IPPC

Version 5.2.12

new review step 1: specify review details

Title IPPC OCS Review Test 2 [Sub-review] 1

Description

Review Type Default

ReviewFlow ☐ Creates a multi-phase review

End Date date : 28 Jun 2016 time : 23 45

Calendar: June 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Next

Figure 38: Creating a Sub-Review Step 2: Uploading documents

IPPC - OCS Admin Review Logged in as: IPPC Secretariat in Workgroup IPPC

Version 5.2.12

new review step 2: upload documents

documents already attached to this review:

File name	Title	TOC Levels (Word only)	Uploaded	Preparation	
TestForNewIPPCOCS-2_EN.doc	TestForNewIPPCOCS-2_EN.doc	All	1 Mar 2016	Successful	Delete

File

Title

TOC Levels (Word only) ☐ None ☒ All ☐ Limit to: 1

Document use in review Reference document

Previous **Next**

Figure 39: Creating a Sub-Review Step 3: Specifying participants

IPPC - OCS Admin Review

Version 5.2.12 Logged in as: IPPC Secretariat in Workgroup IPPC

new review step 3: specify participants

participants already included on this review:

Name	Email	Role	Details	Participant
IPPC Secretariat	IPPC-OCS@fao.org	Owner	Edit	Remove

add new participant

Find Users Go

Name	Email	Selected
<input type="button" value="Select All"/> <input type="button" value="Deselect All"/> <input type="button" value="Add"/>		

[Change workgroup](#) [Distribution lists](#) [Add Users](#)

[Previous](#) [Next](#)

Figure 40: Creating a Sub-Review Step 3: Specifying participants, selecting reviewers

IPPC - OCS Admin Review

Version 5.2.12 Logged in as: IPPC Secretariat in Workgroup IPPC

new review step 3: specify participants

participants already included on this review:

Name	Email	Role	Details	Participant
IPPC Secretariat	IPPC-OCS@fao.org	Owner	Edit	Remove

add new participant

Everyone

Name	Email	Selected	+P?
Algeria	moumenekhaled63@gmail.com	<input checked="" type="checkbox"/> Viewer	
Antigua and Barbuda	janil.gore-francis@ab.gov.ag	<input checked="" type="checkbox"/> Reviewer	
APPPC	yongfan.piao@fao.org	<input type="checkbox"/> Reviewer	

Figure 41: Creating a Sub-Review Step 4: Review options

IPPC - OCS Admin Review

Version 5.2.12 Logged in as: IPPC Secretariat in Workgroup IPPC

new review step 4: review options

[Review Options](#) [Email Options](#) [ReviewZone Options](#)

offline settings

Allow reviewers to download a copy of the document ☒

Allow reviewers to review documents offline ☒

independent review

Reviewers do not see each others comments ☒

allow proposed changes

Allow proposed changes in review ☒

allow sub-review

Allow review participants to create a sub-review from this review ☒

delegation

Allow review participants to delegate? ☒

mandatory categorization

Force review participants to select a comment category ☒

auto-update accepted changes

automatically update with accepted changes from the master review ☐

[Previous](#) [Next](#)

Figure 42: Creating a sub-review Step 5: Verify details and start review, or put it on hold

The screenshot shows the 'Review' tab in the IPPC - OCS system. The user is logged in as 'IPPC Secretariat'. The main content area is titled 'new review step 5: verify details and start review or put it on hold'. It contains three sections: 'review details', 'participants', and 'documents'. The 'review details' section shows a title 'IPPC OCS Review Test 2 [Sub-review] 1', description, status 'Not Started', and end date '28 Jun 2016 11:45 PM'. The 'participants' section lists three users: Algeria (Viewer), Antigua and Barbuda (Reviewer), and IPPC Secretariat (Owner). The 'documents' section shows a file 'TestForNewIPPCOCS-2_EN.doc' with a title 'TestForNewIPPCOCS-2_EN.doc' and preparation status 'Successful'. At the bottom, there are buttons for 'Delete Review', 'Review Options', 'Put Review on Hold', and 'Start Review'.

19. Searching for reviews

The 'Search for reviews' tab allows you to search for a specific document that is or was open for review (consultation).

To search all reviews available to you, first login to the system. Then select the 'Review tab', then 'my reviews'. Select the 'Search for reviews' tab (Figure 38). You should then see a drop down selection with IPPC and below that another group. Select the group below IPPC (see Figure 8).

Enter a word or phrase in the search field and select 'Go' to begin searching. The search will return all reviews whose title starts with the value you entered. If you want to search for review titles containing certain characters, use * as a wildcard. For example, entering *design will return reviews ending in design; entering *design* will bring back all reviews containing design. Enter an asterisk (*) in the field to return the list of ALL reviews.

Figure 43: Indicating the location of the 'Review' tab, 'my reviews' link and 'Search for reviews' tab

The screenshot shows the 'my reviews' tab in the IPPC - OCS system. The user is logged in as 'Test Contact Point 1'. The main content area is titled 'my reviews'. It contains a search bar with a 'Go' button and a 'Search for reviews' tab. Below the search bar is a table with columns: Due Date, Review Title, Review Status, Details, and Review. The table shows 'No reviews to display'. At the bottom, there is a 'printable view' link and a search help text: 'The search will return all reviews whose title starts with the value you entered. If you want to search for review titles containing certain characters, use * as a wildcard. For instance, entering *design will return reviews ending in design; entering *design* will bring back all reviews containing design.' Red arrows point to the 'Review' tab, the 'my reviews' link, and the 'Search for reviews' tab.

20. Accepting and closing comments

It is important to note that IF NO INTERNAL REVIEW IS AVAILABLE all comments inserted by, or shared with and later accepted by, the Author (IPPC Contact Point) are automatically sent to the IPPC Secretariat when the commenting period is over. The Author does not need to manually publish (submit) the comments to the Secretariat.

If an internal review is available, the Author must manually select the “Publish” icon at the top of the screen in the Document actions toolbar. Otherwise, the comments WILL NOT BE PUBLISHED (submitted) to the IPPC Secretariat.

To accept or close comments, the Author or Deputy Author must login to the system, then select the 'review tab', then 'my reviews'. Select the 'Reviews I'm in' tab (Figure 16). This will display the table of all the documents available for you to review. Locate the document you want to comment on, then select 'Enter' to the far right (Figure 16).

To accept or close a comment, go to the review pane, locate the paragraph that contains the comment you want to accept or close, and select the paragraph. All of the comments for that paragraph will open in the comment pane. Locate the comment you want to accept or close and select the 'Accept' or 'Close' link for that comment (Figure 44). The comment will be opened for you to reply, accept, revise, close, or merge with another comment. Select 'Apply' to save your changes. Select 'Cancel' to not make any changes.

The Author or Deputy Author next locates the comment in the review pane (Figure 17) the comments window as if making or viewing a comment. In addition to standard functionality available to Reviewers, the Author will have 'Accept' and 'Close' options for each comment and proposed change.

Figure 44: Indicating the location of the 'Accept' and 'Close' link

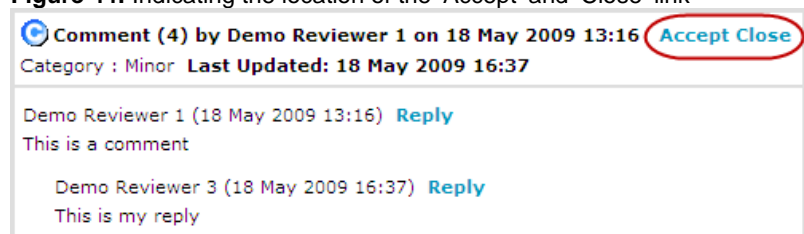
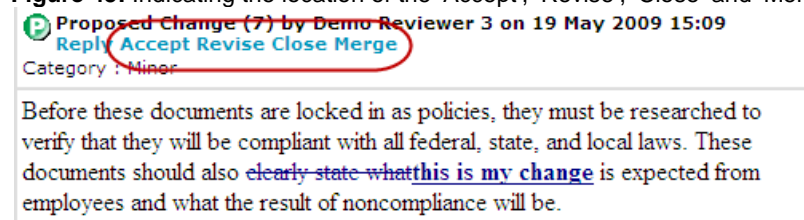
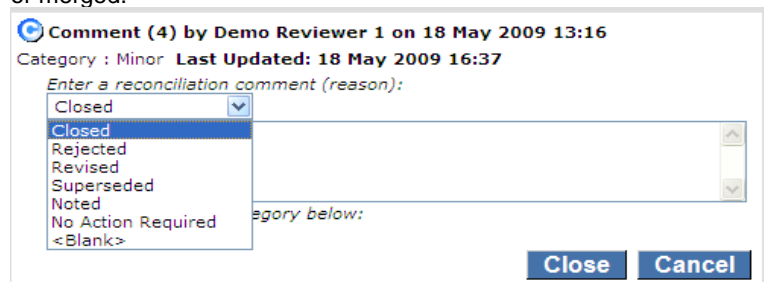


Figure 45: Indicating the location of the 'Accept', 'Revise', 'Close' and 'Merge' links

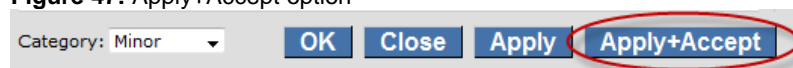
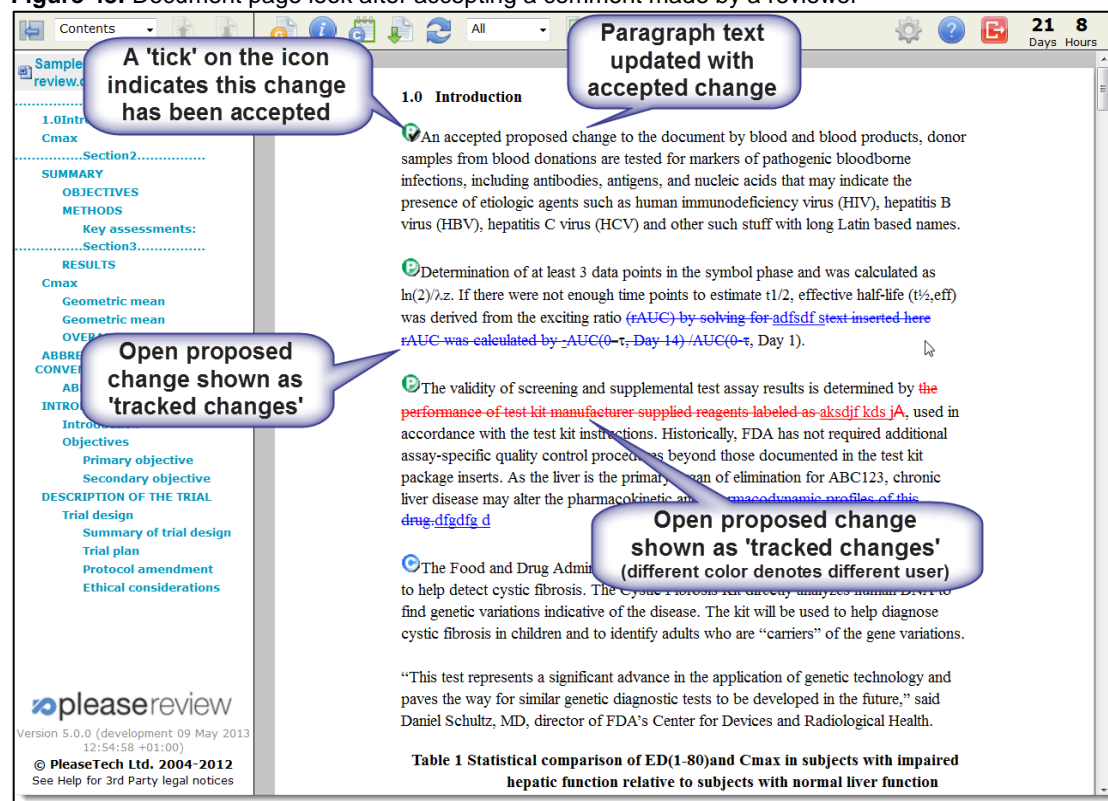


Once accepted or closed, the Author receives the option to enter a reconciliation comment (i.e. reason).

Figure 46: Optional reconciliation comment explaining why comments were accepted, closed, revised or merged.



If an Author makes a new comment, proposes a new change or revises as existing change they have the additional option of 'Apply+Accept'. This means that the comment or change will automatically be accepted as soon as it is applied.

Figure 47: Apply+Accept option**Figure 48:** Document page look after accepting a comment made by a reviewer

21. Retrieving comments

First, login to the system, then select the 'review tab', then 'my reviews'. Select the 'Reviews I'm in' tab. This will display the table of all the documents available for you to review. Locate the document you want to comment on, then select 'Enter' to the far right. Next, you will be taken to the commenting area for that document.

To see all the comments for this document, select the 'view report' icon. This will open a new window where you can view all the comments (general, editorial, substantive, technical, and translation) for this document.

To see a selection of comments, for example only substantial and technical comments, select the 'view report' icon. Next, choose 'select comments', which will open a new window where you can select which type of comments you want to display in your report. Select 'OK' to run the new report.

To save or print a report of the comments, select the 'view report' icon. Next, select 'print', where you will be able to print the file into PDF and save it for your records.

The review closeout screen allows the review Owner to download reviewed documents, complete with aggregated comments and proposed changes, and access a report for other formats.

Figure 49: Download documents with comments

download documents with comments marked as tracked changes

[Select Comments](#)

File name	Title	Details
Sample policy document.doc	Sample policy document.doc	Download
sample ls.pdf	sample ls.pdf	Display
Intro to pleasereview (demo short).ppt	Intro to pleasereview (demo short).ppt	Display
Folder 3 Image Docs only.zip	Folder 3 Image Docs only.zip	Display

[Download All](#)

The document/report is retrieved by selecting the 'Download' or 'Display' link. Selecting the 'Download All' option will download a zip file containing all documents available in the system which have the download option.

It is possible to define which comments, etc. appear in the document/report using the 'Select Comments' link, as shown below:

Figure 50: Select comments (to sort comments inserted in the system)

Select comments by:

Status	<input type="checkbox"/> All <input type="checkbox"/> Closed <input checked="" type="checkbox"/> Accepted <input checked="" type="checkbox"/> Open
Type of comment	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> General <input checked="" type="checkbox"/> Comment <input checked="" type="checkbox"/> Proposed Change
Comment category	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Minor <input checked="" type="checkbox"/> Major <input checked="" type="checkbox"/> Cosmetic <input checked="" type="checkbox"/> <Blank>
Participant	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Demo Author 1 <input checked="" type="checkbox"/> Demo Author 2 <input checked="" type="checkbox"/> Demo Contributor 1 <input checked="" type="checkbox"/> Demo Contributor 2 <input checked="" type="checkbox"/> Demo Owner <input checked="" type="checkbox"/> Demo Reviewer 1 <input checked="" type="checkbox"/> Demo Reviewer 2 <input checked="" type="checkbox"/> Demo Reviewer 3 <input checked="" type="checkbox"/> Demo Reviewer 4 <div style="margin-left: 20px;"> <input checked="" type="radio"/> Made a comment <input type="radio"/> Participated in discussion </div>
Date	<input checked="" type="radio"/> All <input type="radio"/> Since I entered the review 2 Jun 2009 10:46 <input type="radio"/> Since: <div style="margin-left: 20px;"> date : <input type="text"/> / <input type="text"/> / <input type="text"/> time : <input type="text"/> : <input type="text"/> </div>

< June 2009 >

Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

The default position is shown above. So, by default, the downloaded document/displayed report does not contain closed comments, but does include all open and accepted comments from all participants.

22. Workgroup administration

Authors manage the Workgroup in each country. These Workgroup Administrator manage the participants in a Workgroup. Select 'Workgroup management' and this will list the Workgroups of which you have administration permissions. If you are an official IPPC contact point, you will be able to add up to one OCS Deputy and three OCS reviewers.

Figure 51: Workgroup management

workgroup management
[Root](#) » [Sales \(ID:100\)](#)

sub workgroups

Workgroup ID	Workgroup Name	Notes	Public	All monitors	
177	sub-sales				Select
178	Xray-1				Select

[Review Types](#) [Settings](#) [Edit](#) [Copy Emails](#) [License](#) [Delete](#)

[Add New](#) [Members](#) [Back](#)

Selecting 'Members' will list all members of the Workgroup and from that list you are able to edit (including Workgroup role) or remove the members.

23. Creating and managing distribution lists

Review Owners (by default those with Author permissions) have the ability to create and manage personal distribution lists as do users with a Workgroup role of Delegator. Shared distribution lists are created and managed by Workgroup Administrators.

Select 'manage lists' under 'distributions lists' from the left hand menu when not in a review.

Figure 52: Distribution lists

distribution lists

Editing workgroup: [demo](#)

personal distribution lists

Title		
my personal list	Edit	Delete

[Add New List](#)

Select 'Add New List' then enter the list title (do not call a list 'Everyone' as the system automatically creates a list with this title). You can search for users individually or select the 'Everyone' list from the drop down:

Figure 53: New personal distribution list

distribution list

Enter title
 Title:

distribution list members:

Name Role +P ?

[Save List](#) [Back](#)

workgroup member:

Name	Email	Selected	Role	+P ?
Everyone		<input checked="" type="checkbox"/>	Contributor	<input type="checkbox"/>
Find Users				
Bob Contributor	contrib2@demo.com	<input checked="" type="checkbox"/>	Contributor	<input type="checkbox"/>
Clare Reviewer	reviewer2@demo.com	<input type="checkbox"/>	Reviewer	<input type="checkbox"/>
Dave Reviewer	reviewer1@demo.com	<input checked="" type="checkbox"/>	Reviewer	<input type="checkbox"/>
Jason Contributor	contrib1@demo.com	<input checked="" type="checkbox"/>	Author	<input type="checkbox"/>
Sue Author	auth...	<input type="checkbox"/>	Reviewer	<input type="checkbox"/>
Tim Reviewer	Rev...	<input type="checkbox"/>	Reviewer	<input type="checkbox"/>

[Select All](#) [Deselect All](#) [Add](#)

Select the participants to be included on the list, and their default list roles. Then click 'Add'. Once you have all the required participants with their appropriate roles shown in the top half of the screen under 'distribution list members', select 'Save List'.

Once the list is saved it will appear under 'personal distribution lists'. Selecting 'Edit' will permit you to edit the list, and selecting 'Delete' will delete the list.

Note: It is also possible for Authors to create and maintain personal distribution lists from a list of review participants created while setting up a review.