MADCAP CONTRIBUTOR 9

Review Workflow

CONTENTS

CHAPTER 5

APPENDIX

Introduction

If you are using a full registered mode of Contributor, you can review and edit documents sent to you by others.

If you are using the free review mode, you can review documents sent to you by others and add annotations (comments). However, you cannot edit the documents.

REVIEWING DOCUMENTS—FULL REGISTERED MODE

1. **Open** You can open the review package file from your email, from SharePoint, or from an external resource folder. The files in the review package are listed in the Review Packages window pane. Double-click a row to review and edit a particular file.

   If the review package contains topics as well as snippet files, you can open the snippets too. You can open snippets by double-clicking them in the Review Packages window pane. Another approach is to right-click the snippet where it is inserted in a topic (or in another snippet) and from the context menu select **Open Snippet File**.

2. **(Optional) Insert Comments** You can insert annotations (comments) that are associated with specific areas of text in the document. These annotations do not become part of the content within the document, but rather are intended for internal use between you and others. (Do not select more than one paragraph or click at the very end of paragraphs; otherwise, the "Insert Annotation" option will not be enabled.) See "Annotations" on page 27.

3. **Return** You can return the review package to the author via email, or by using SharePoint Integration or the external resources feature. See "Returning Documents to Authors" on page 32.

This is a typical document sent for review by an author.

This file is one of several sent for review in the same package.

When you are finished reviewing all files in the package, click this button to return the package to the author.

All of the files in the review package are listed in this window pane. You can double-click any row to open a particular file.

File   Home   Insert   View   Review   Tools   Table   Window   Help   Quick Launch (Ctrl + Q)

Review Packages | Track Changes | Accept Change | Reject Change | ☑ Show Changes | Previous Change | Next Change | Insert Annotation | Delete Annotation | Review Options

Packages | Changes

Company.htm (Please Review.fltrev)

Company.htm (Please Review.fltrev) ×   Start Page ×

Layout (Web) ▾   Medium (print) ▾   Page Layout ▾

(text markup)

Company

Lorem ipsum dolor rit amet, consectettr adipiscing elit.

CompanyNa My Company Name, LLC
me:

StreetAddres 1234 Lorem Ipsum Ave.
S:

CA 92037

4567

any.com

Words: 9 | Font S   100%   ▾

Changes

Review Package

Return to Sender...

Please Review.fltrev ×

Switch to TOC View

File	Folder	
Basic-Steps.htm	Content/A-Intr...	
Company.htm	Content/D-Ref...	
FAQs.htm	Content/D-Ref...	
Feature1.htm	Content/B-Fea...	
Feature2.htm	Content/B-Fea...	
Feature3.htm	Content/B-Fea...	

REVIEWING DOCUMENTS—FREE ANNOTATION-ONLY MODE

1. **Open** You can open the review package file (from your email, from SharePoint, or from an external resource folder). The files in the review package are listed in the Review Packages window pane. Double-click a row to review and edit a particular file.

   If the review package contains topics as well as snippet files, you can open the snippets too. You can open snippets by double-clicking them in the Review Packages window pane. Another approach is to right-click the snippet where it is inserted in a topic (or in another snippet) and from the context menu select **Open Snippet File**.

2. **(Optional) Insert Comments** You can insert annotations (comments) that are associated with specific areas of text in the document. These annotations do not become part of the content within the document, but rather are intended for internal use between you and others. (Do not select more than one paragraph or click at the very end of paragraphs; otherwise, the "Insert Annotation" option will not be enabled.) See "Annotations" on page 27.

3. **Return** You can return the review package to the author via email, or by using SharePoint Integration or the external resources feature. See "Returning Documents to Authors" on page 32.

REGULAR DOCUMENT FILES VERSUS LINGO TRANSLATION FILES

For MadCap Lingo review package (LIREV) files, the XML Editor works a bit differently than it does for regular document files from products such as Flare or Word. That's because Lingo is a translation tool, so only text segments are important, and in particular, the target language segments. When you open a file from an LIREV package, the editor shows a table containing text segments from that file in the source and target languages. The status of each segment—which indicates how closely the target segment matches a translated segment in translation memory—is also shown.

You can make changes only to the target segment, as well as insert annotations. In addition, you can make certain formatting edits to the target segment (e.g., bold, underline, color), but many other features (e.g., insert image, hyperlink, table) are disabled for Lingo review files.

⚠ **IMPORTANT** You cannot use the Internal Text Editor when working with review packages.

Review Packages Window Pane

Supported In:

This window pane lets you view the files that are part of a review package file sent from an author. You can double-click on a file name to open it so that you can review and edit it. When you are finished and you save your changes, you can click the "Return to Sender" button in the local toolbar to email it back to the author.

HOW TO OPEN THIS WINDOW PANE

Do one of the following:

- **Email/Windows** Open a review package file received from an author.

- **Ribbon** Select **Review > Review Packages**.

Button/Section	Description
	Saves changes to the active file.
	Saves changes to all of the open files.
Return to Sender...	Opens a new email message with the file attached so that you can return it to the author.
	NOTE There is more than one way to transfer files between individuals using Flare and Contributor. For example, you can: (1) use the integrated email feature with Microsoft Outlook, (2) add files to SharePoint or External Resources where others can access them, or (3) save files to your computer (**File > Save**, then **Save As** or **Save To**) and then manually transfer them using some method (e.g., email). If you want to use the integrated email feature, you must have matching versions of Contributor and Outlook. If you are using 64-bit Contributor, you need 64-bit Outlook. Likewise, if you are using 32-bit Contributor, you need 32-bit Outlook.
	Opens the Columns dialog, which lets you configure the way the column information is shown.
	Opens the selected item.
	Opens the Properties dialog for the selected item.
Switch to TOC View	Switches to the TOC view. This lets you view the review package as a TOC *only if* the review package files have been sent by a Flare author from a TOC.
Switch to Grid View	Switches to the Grid view. This lets you view the review package as a list of files. This button is only active if you are currently in the TOC view.
	Expands all of the folders so that you can see all of the files under each one. This button is enabled only if you are in TOC view.
	Collapses all of the folders so that you can no longer see all of the files under each one. This button is enabled only if you are in TOC view.

Button/Section	Description
	Expands all of the folders with review files so that you can see all of the files under each one. This button is enabled only if you are in TOC view.

Tracking Changes

For documents in Contributor, you can track changes and accept or reject those alterations individually. Each change is marked in a color (different colors for different users) and/or labeled in a sidebar. Tracked changes are visible only in the editor in Contributor. They are not visible when viewing any output created from the document (e.g., saving to HTM, XPS, or PDF files).

When this feature is enabled, every change to the document—along with the user who performed the change—will be stored in the document's markup. For example, deleted text won't actually be removed from the document, but will instead be marked as deleted in the code. However, if the change is accepted, the text will be removed from the document.

When a Flare author sends you a review package file (FLTREV) and you edit the content files within it, your changes are automatically tracked so that the author can easily see the changes you made. You cannot disable the track changes feature for these types of documents.

This chapter discusses the following:

Examples

The following images show how tracked changes work in Contributor.

This ~~topic~~ is a _very_ good place to explain the high level concepts that allow a user to be successful with FictionSoft. You might include the following:

- Overall work flow for FictionSoft
- Important
  successfu
- ~~Links to w~~
- Special language or jargon ~~that a user will~~ need to understand
- Any other information ~~that a user would~~ need

Deleted [AL]

Added [AL]

Ad | Accept Insertion
   | Reject Insertion

Deleted [PS]

Added [JK]

Deleted [PS]

Deleted [JK]

By right-clicking on a change, you can choose whether to accept or reject it.

Hiding and Showing Changes and Annotations

Supported In:

You can hide or show tracked changes and annotations in the active document.

HOW TO HIDE AND SHOW CHANGES AND ANNOTATIONS

1. Open the document or topic.
2. Select **Review > Show Changes**.

Changing Your User Name and Initials

Supported In:

When you first install and launch Contributor, your login user name is captured and stored in the Review tab of the Options dialog (**File > Options**). The first two letters of the user name are also stored as your initials. This information is employed whenever you use the track changes and annotations features.

For example, if you insert an annotation in a topic, your initials are displayed at the beginning of the comment so that other users know where the annotation came from.

You can always change your Contributor user name or initials to something else.

> ☆ **EXAMPLE**
>
> Let's say your login user name is "johndoe." In that case, your initials are stored automatically as "jo." Although you want to keep your user name as is, you want to change the initials to "jd," which other users will more readily associate with you. Therefore, you open the Options dialog (**File > Options**) and use the Review tab to change only your initials.

HOW TO CHANGE THE USER NAME AND INITIALS FOR REVIEWS

1. Select **Review > Review Options**.

2. Change the text in either the **User Name** or **Initials** fields.

3. Click **OK**.

Changing the Display of Tracked Changes

Supported In:

You can change the way tracked changes are displayed in the interface (e.g., in balloons, inline). You can also enable or disable change bars.

HOW TO CHANGE THE DISPLAY OF TRACKED CHANGES

1. Select **Review > Review Options**.
2. In the **Tracked Change Display** section, choose any of the following.

DISPLAY ALL CHANGES IN BALLOONS

If you select this option, all changes—text and formatting—will be shown in balloons in the side-bar.
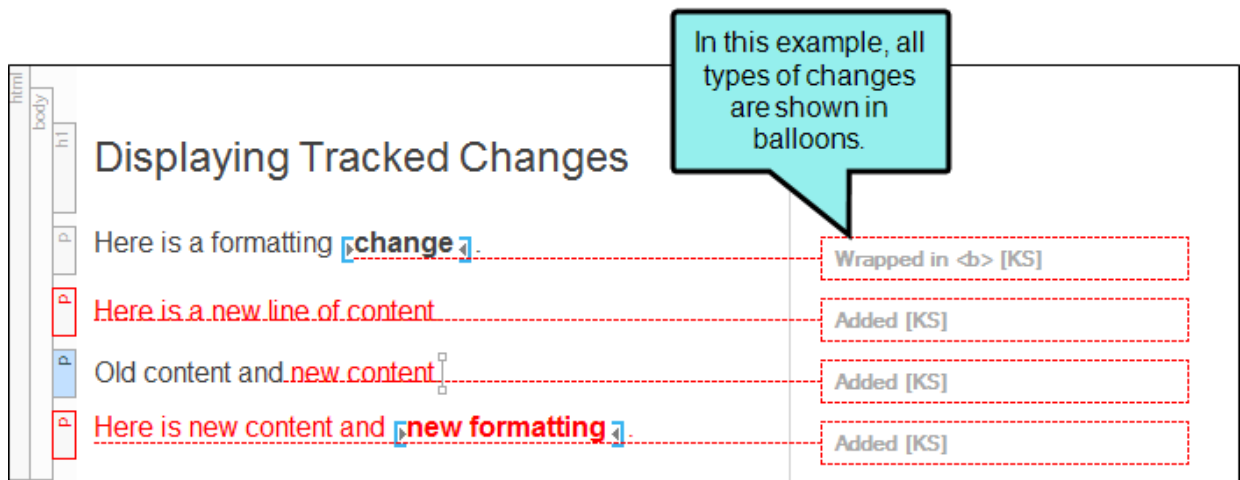
DISPLAY ONLY FORMAT CHANGES IN BALLOONS

If you select this option, changes that include content only (or content plus formatting) will be shown inline. But changes that contain formatting modifications only will be shown in balloons in the sidebar.
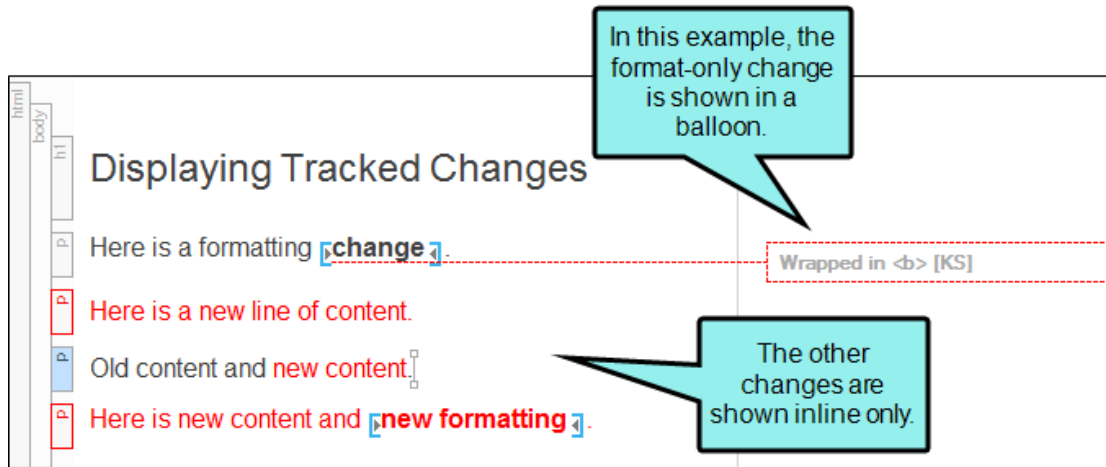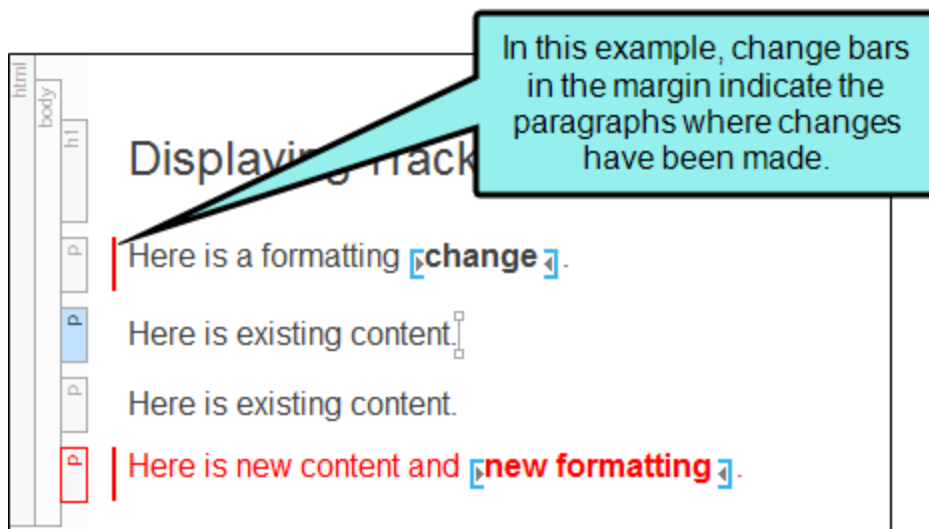

DISPLAY ALL NON-FORMAT CHANGES INLINE

If you select this option, all text changes will be shown inline. Balloons are not used.
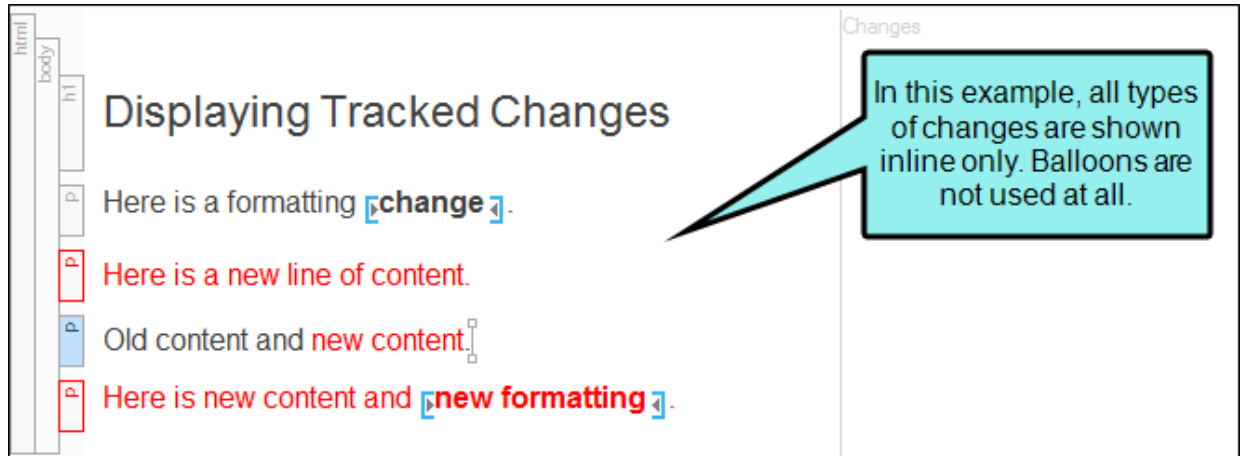
3. In the **Change Bar** section, select whether or not you want to turn on change bars. If you turn on change bars, a bar appears on the left side of the paragraph where a change has been made. Change bars appear in PDF output and the XML Editor.

4. Click **OK**.

Changing the User Color for Reviews

Supported In:

The tracked changes and annotations for each user can be shown in a separate color. You also have the option of choosing a specific color for all users.

HOW TO CHANGE THE USER COLOR FOR REVIEWS

1. Select **Review > Review Options**.

2. In the **User Colors** section, choose one of the following.

USE A DIFFERENT COLOR FOR EACH USER

Select this option if you want Contributor to automatically assign a different color for each user.
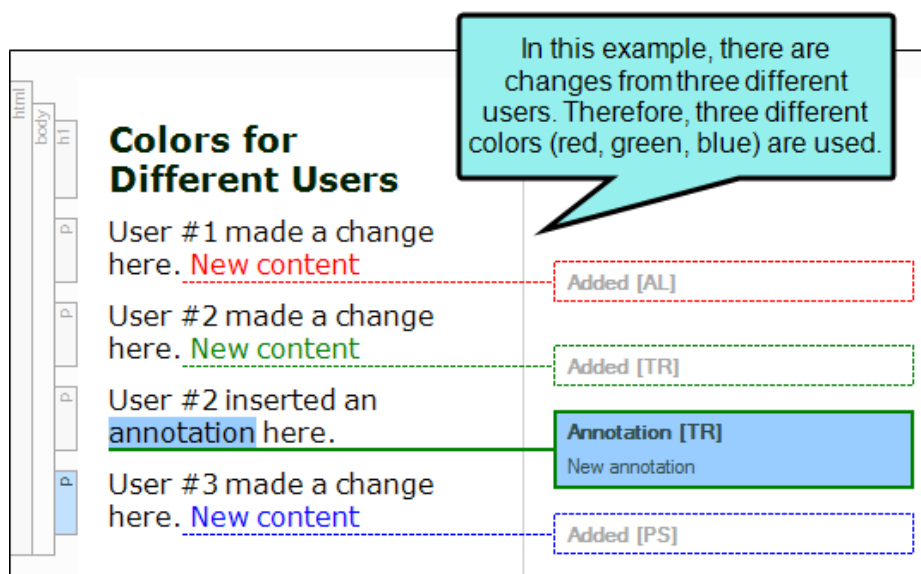
USE THE FOLLOWING COLOR FOR ALL USERS

Select this option if you want all changes, regardless of the user, to display in the same color. After you choose this option, click the down arrow below to select a color.

3. Click **OK**.

Finding Changes

Supported In:

REVIEW WORKFLOW (REGISTERED) · **FREE REVIEW WORKFLOW (ANNOTATION)** · **CONTRIBUTION WORKFLOW** · **NEW DOCUMENT WORKFLOW**

You can use navigation buttons in the Review ribbon to quickly navigate to the previous or next tracked change or annotation in the file.

HOW TO FIND CHANGES

1. Open the document or topic.

2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 17.

3. Select **Review > Next Change** or **Review > Previous Change**.

Accepting or Rejecting Tracked Changes

Supported In:

You can right-click on tracked changes and use a context menu to accept or reject them individually. You can also use options in the interface to accept or reject each tracked change or all tracked changes in a file. The reject option also removes annotations.

When you track changes, every change to the document—along with the user who performed the change—will be stored in the document's markup. When a change is accepted or rejected, all markup designating it as a change is removed. When all changes in the document are resolved, they will not contain any history of changes made and can be considered ready for output.

HOW TO ACCEPT OR REJECT TRACKED CHANGES

1. Open the document or topic.

2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 17.

3. You can perform any of the following tasks.

    #### ACCEPT ALL CHANGES IN THE DOCUMENT

    - Select **Review > Accept Change > Accept All Changes**.

    #### ACCEPT SINGLE CHANGE

    Do one of the following, depending on the part of the user interface you are using:

    - **Ribbon** Click on the change you want to accept. Select **Review > Accept Change**.

    - **Right-Click** Right-click on the change you want to accept. From the context menu, select **Accept [Type of Change]**.

REJECT ALL CHANGES IN THE DOCUMENT

- Select **Review > Reject Change > Reject All Changes**.

REJECT SINGLE CHANGE

Do one of the following, depending on the part of the user interface you are using:

- **Ribbon** Click on the change you want to reject. Select **Review > Reject Change**.

- **Right-Click** Right-click on the change you want to reject. From the context menu, select **Reject [Type of Change]**.

4. Click ⊞ to save your work.

📝 **NOTE** Tracked changes are visible only in the editor in Contributor. They are not visible when viewing any output created from the document (e.g., saving to HTM, XPS, or PDF files).

📝 **NOTE** This feature is not supported for MadCap Lingo review package (LIREV) files.

Annotations

Supported In:

REVIEW WORKFLOW (REGISTERED) | FREE REVIEW WORKFLOW (ANNOTATION) | CONTRIBUTION WORKFLOW | NEW DOCUMENT WORKFLOW

You can insert an annotation (comment) into a document. These annotations do not become part of the actual content, but rather are intended for internal use between you and others.

This chapter discusses the following:

Inserting Annotations

Following are steps for inserting annotations.

HOW TO INSERT AN ANNOTATION

1. Open the document or topic.

2. Highlight the content that you want to associate with the annotation, or place your cursor on it.

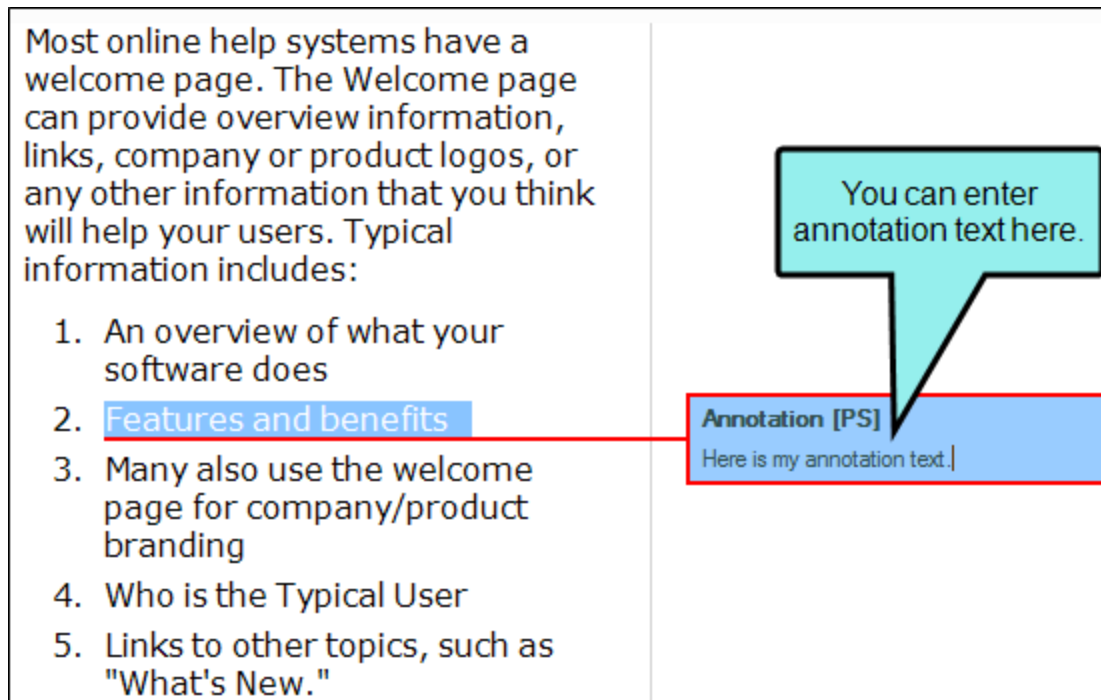> 🗒 **NOTE** Do not highlight more than one paragraph.

3. Do one of the following, depending on the part of the user interface you are using:

    ■ **Ribbon** Select **Review > Insert Annotation**.

    ■ **Right-Click** If the track changes feature is enabled, you can right-click and select **Insert Annotation**.

    A rectangle extends to a sidebar on the right, with a line pointing to the selected content. This rectangle will hold the annotation text after you type it.

    Also, the selected content is shaded, indicating that the annotation refers to that text. However, the shading will not be displayed in the output; it is for internal use only.

4. Type your comment in the annotation rectangle.

5. Click [save icon] to save your work.

> 📝 **NOTE** When you insert an annotation, your initials are displayed next to it. The initials are the first two letters of your login user name. However, you can change the user name and initials (for use in Contributor) to something else. For more information see the online Help.

Editing Annotations

You and other individuals can insert comments and notes next to content in a topic. Annotations do not become part of the actual content; they are simply comments for your internal use. You can easily make changes to an annotation.

HOW TO EDIT ANNOTATIONS

1. If you do not see annotations in the editor, select **Review > Show Changes**.

2. Click in the rectangle containing the annotation text and make your changes.

3. Click 💾 to save your work.

Deleting Annotations

You can delete annotations that have been inserted into a document or topic.

HOW TO DELETE ANNOTATIONS

1. Open the document or topic.

2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 17.

3. Do one of the following, depending on the part of the user interface you are using:

   - **Ribbon** Select the annotation you want to delete. Select **Review > Delete Annotation**.

   - **Right-Click** Right-click on the annotation you want to delete, and from the context menu, select **Delete Annotation**.

4. Click to save your work.

Returning Documents to Authors

Supported In:

After reviewing documents sent from an author, you can return the documents via email.

> 📝 **NOTE** There is more than one way to transfer files between individuals using Flare and Contributor. For example, you can: (1) use the integrated email feature with Microsoft Outlook, (2) add files to SharePoint or External Resources where others can access them, or (3) save files to your computer (**File > Save**, then **Save As** or **Save To**) and then manually transfer them using some method (e.g., email). If you want to use the integrated email feature, you must have matching versions of Contributor and Outlook. If you are using 64-bit Contributor, you need 64-bit Outlook. Likewise, if you are using 32-bit Contributor, you need 32-bit Outlook.

HOW TO RETURN DOCUMENTS TO AUTHORS

The following steps include the integrated Outlook email method. If your systems are not set up for this feature, you can use one of the other methods (e.g., or save to your computer and manually email).

1. Open the review package containing the documents you reviewed. If you do not see the Review Packages window pane, select **Review > Review Packages**.

2. In the local toolbar of the Review Packages window pane, click .

3. In the email message, click **Send**.

APPENDIX

PDFs

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

Contributor Workflow Guide

Getting Started Guide

Review Workflow Guide

Shortcuts Guide

What's New Guide