

# Using Group Review

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## Introduction

Review is an easy to use mechanism for collecting comments about a document or project. The document being reviewed is not modified by the review process. When a review is initiated, the user can provide review instructions. A team can be used to define the reviewer list. Both "by invitation" and public reviews are supported. All functions are both Notes Client and Web enabled.

Review is a process that can be applied to Project Documents, Project Profiles, Issues, Risks, Scope Changes, Schedule Templates and other documents.

Review allows you to ask you colleagues for their comments about a specific document, problem or project. It provides a convenient way to collect and review those comments.

Unlike comments collected via Note or personal email, review comments become part of the database and are stored in a single document.

Unlike responses to issues or discussions, review comments are only semi-public. They do not appear in reports or views and they don't become part of the final archived project.

Unlike comments that might be made via document markups, these comments never affect the document being reviewed. This is important because it means that reviewers do not need to have edit rights to the documents being reviewed.

In a project where all documents will be approved by a committee, Review allows you the opportunity to pass documents by some or all of the key committee members prior to submission so that objections can be handled before they become formal.

Reviews can be open or by invitation only. An open review allows any user of the repository to post a comment. A "by invitation" review allows only those specific people that you have designated to post comments.

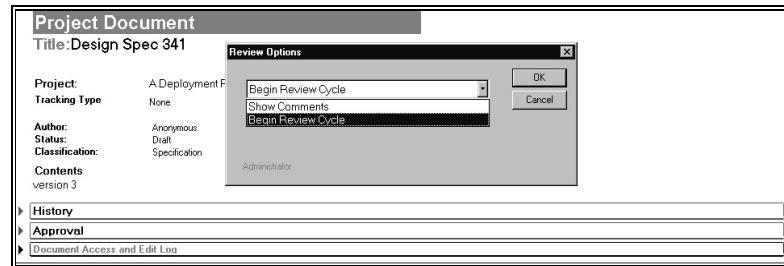
One document can have many reviews over its lifetime. Each is called a review cycle. Comments from all review cycles are retained.

## Initiating A Review

### *Using a Notes Client:*

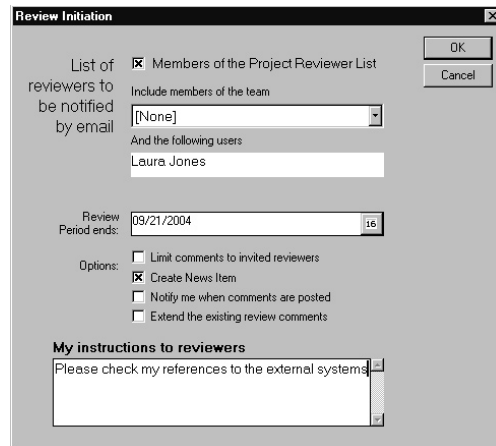
Open the document to be reviewed and click the "Review" action at the top of the form. This action will generally be located at the far right side of the document. You may need to increase the width of your window to see it.

This will display the Review Options Dialog.



The Review Options dialog will have two options "Show Comments" and "Begin Review Cycle". Select "Begin Review Cycle" and click OK.

This will display the "Review Initiation Dialog".



### *Using a Web Browser:*

Open the document to be reviewed and click "Review".

This will display the Review Options Form.

The Review Options will have two options "Show Comments" and "Begin Review Cycle". Select "Begin Review Cycle" and click Submit

## The Review Initiation Dialog

### *List of Reviewers*

There are three fields which are used to construct the "List of Reviewers"

1. Members of the Review Committee [checkbox]

2. Include members of the team [droplist of team names]
3. Add the following users [text field]

The Review committee for any project is defined in the policy section of the project profile in the section entitled "Members of the Review Committee."

Any team may be selected. All members of that team will be included. You may enter the username(s) for anyone else you would like to include in the text area. Separate multiple names with commas.

### ***Review Period Ends***

In this field you are required to enter a date in the future. Reviewers will not be allowed to post comments after this date. Generally a couple of days is enough time, but you can make this as long as you like.

When using a Notes client, an icon will open a calendar selectors.

### ***Options***

[x] Limit comments to invited reviewers

If checked then no one who has not been put into the list of reviewers will be allowed to post a comment. If not checked, then anyone who can access the repository will be able to post a comment (assuming that they know that the document is open for review).

[x] Create News Item

If checked the system will create a News item that announces the opening of the review and provides a link to the document.

[x] Notify me when comments are posted

This very useful option causes the system to send you an immediate email whenever anyone posts a new comment in your review. The contents of their comment are included in the email.

If there have been previous review cycles on this document, then an additional item appears:

[x] Extend the existing review comments.

If checked then new comments will go to the top of the existing review comments page. If not checked, then a new review comments page will be created. The older ones can be accessed using the [Prior Reviews] action.

### ***My Instructions to Reviewers***

In this area you can write specific instructions that will be sent along with the review notification and which will appear on the Post Comments form. The key to useful reviews is to provide very specific instructions. This is also very beneficial for the reviewer since they do not have to guess what you are interested in..

Note that, if this is not the first review cycle, the comments from the previous cycle will appear.

When you can completed filling in the dialog box, press OK. You can also skip the review by pressing cancel.

### ***Results of Review Initiation***

The system will send emails to all of the designated reviewers. These emails will contain the name of the document, the review instructions, the review closing date, and a link to the document.

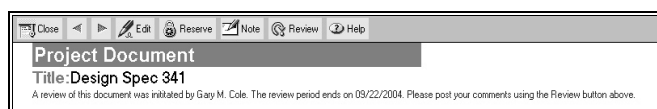
Now, it is possible that the system will not be able to contact all of the reviewer due to incorrectly spelled names or other typical email problems.

If this occurs in the notes client, the system will display a dialog box listing those errors.

If this occurs in the web client, a response page will be displayed to show the errors from which you can continue back to the original document.

You can fix addressee problems using the administrative functions.

If you have used a notes client, the document will close. If a browser the document will be redisplayed.



In either even, the next time you display the document you will find the following message near the top of the document:

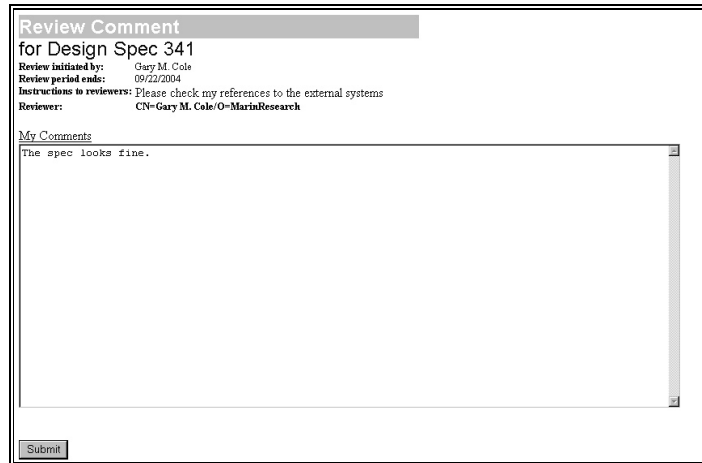
***"A review of this document was initiated by <your name>. The review period ends on 08/19/2004. Please post your comments using the Review button above."***

### ***How Reviewers Post Comments***

In each email, there is a link to the document. By following this link the document is displayed. Reviewers are instructed to click on the "Review" action. The "Post Comment" option is shown as the default. The review should press OK (or submit) to display the Review Comment Form.

## **The Review Comment Form**

This form lists the name of the document, the name of the person who initiate the review, the end date of the review period, the instructions to the reviewer, the name of the reviewer.



The screenshot shows a web form titled "Review Comment" for "Design Spec 341". The form includes the following information:

- Review initiated by: Gary M. Cole
- Review period ends: 09/22/2004
- Instructions to reviewers: Please check my references to the external systems
- Reviewer: CN=Gary M. Cole/O=MarinResearch

Below this information is a section titled "My Comments" with a text area containing the text "The spec looks fine." and a "Submit" button at the bottom.

It provides free form field titled "My Comments".

When the reviewer has written their comments, they press "Record" to save the comments. At this time, if "Notify me when comments are posted" option was used, the system will send the review initiator an email containing a copy of the posted comments.

After the comment is recorded, the system will redisplay the document being reviewed. At this point they can post additional comments using the "Review- Post Comment" action.

### **How Comments are displayed**

Anyone can see the collection of comments already posted using the "Review - Show Comments" action. This will display the Review Comments form (similar to, but not the same as the Review Comment form)

### **The Review Comments Form**

This form can be displayed at any time using the "Show Comments" option of the Review action.

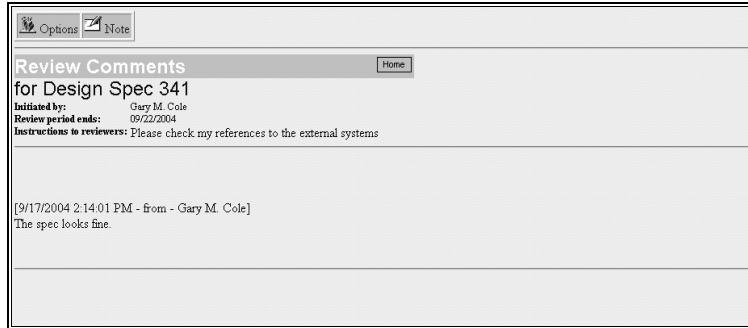
This form shows the time and author stamped collection of all comments from all reviewers. The newest comment will be at the top.

The Review comments form is logically owned by the repository and cannot be edited.

Notes users will see an action (***Email to Me***) which will send a copy of its contents to you as an email.

The ***Note*** action, available to both Notes clients and Web browsers can be used to send an email with a link to this document, or to put a link into your personal journal.

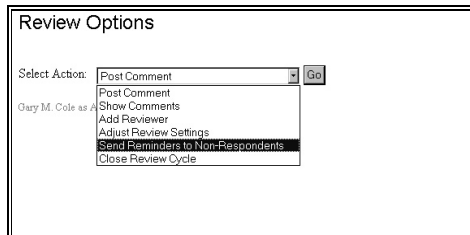
The ***Prior Comments*** action available to both Notes clients and Web browsers allows you to inspect the comments from previous review cycles of the same document (if any exist). This will open a page or dialog box to select the prior review period, and then access that document.



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## Review Administration

Once a review is underway, you may want to adjust it using the extra options that will then appear on the Review options form or dialog box. These options are only visible to the initiator of the review.



### ***Add Reviewer***

As the title suggests this displays a simple form on which you can enter the name of one or more additional people to be added to the reviewer list. The list of current reviewer is also shown. When you add a name and then submit or OK the dialog, the new reviewers will be immediately notified.

### ***Adjust Review Settings***

This opens a dialog box that allows you to change the review end date, the "Limit comments to invited reviewers" and "Notify me when comments are posted" options, and the text of the instructions to reviewers.

### ***Send Reminders to Non Respondents***

This action will compare the list of invited reviewers with the list of posted comments. Anyone who was invited, but has not yet posted a comment, will be send another "reminder" email. It would be best to use this function sparingly!

### ***Close Review Cycle***

This action will prevent any future comments from being posted.

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## My Reviews

My Reviews is a specialized reporting function which compiles a list of all of the reviews in the repository which you have initiated or to which you have been invited.

<i>Reviews Involving Gary M. Cole</i>	
<b>Open Reviews that I have initiated</b>	
Design Spec 341	<a href="#">Show Review Comments</a>
<b>Open Reviews to which I have been invited</b>	
new notes 4	<a href="#">Show Review Comments</a>
<b>Completed Reviews that I have initiated</b>	
Project Requirements Document	<a href="#">Show Review Comments</a>
<b>Completed Reviews to which I have been invited</b>	
aaa template 4	<a href="#">Show Review Comments</a>
<a href="#">Return to Repository Center</a>	

The reviews are grouped by their status and links are provided to each. The My Reviews action is available from the My.. droplist on the Web Repository Center home page and from the Documents Navigator. (Home->Documents->My Reviews)

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## Removing Review Comments

Review comments are automatically deleted from the repository when a project is archived.