InteliNotion

User Guide Module 9: Tasks, Collaborative Review, and Document Protection

For InteliNotion Version: 2024.GR2.0
Last Modified: November 2024

Table of Contents

# 1. USING TASKS BASED ON PRE-CONFIGURED LIFECYCLE FOR A DOCUMENT OR COMPONENT

Tasks can be created within the system to conduct various business-related processes such as the review or approval/locking of a document or component. The available tasks or lifecycle actions are based on the lifecycle configuration for a given document or component within the system.

> **Notes:**
> - The review, approval, and task management steps outlined below are for a document, but the same ones can be followed for a single component.
> - The lifecycle state names and transitions, as well as the task names that are configured in the system, may be different than those included below, but the underlying functionality is the same.
> - The task notifications included below are examples and their content is based on how the admin configures them in the system.
> - To initiate a task for a document or component, it cannot be **checked out** for single authoring, or currently in a co-authoring or collaborative review session (applicable for documents only).

1.1 INITIATING A TASK FOR A DOCUMENT OR SINGLE COMPONENT

A document or single component can be sent for review, approval/lock, or any other type of required business-process using a task. To initiate a new task via the *InteliNotion Word App* (as shown below) or *Web Console*, right-click on the document or component name and under **Lifecycle Actions**, click the available lifecycle action name (eg, **Send for Review**).
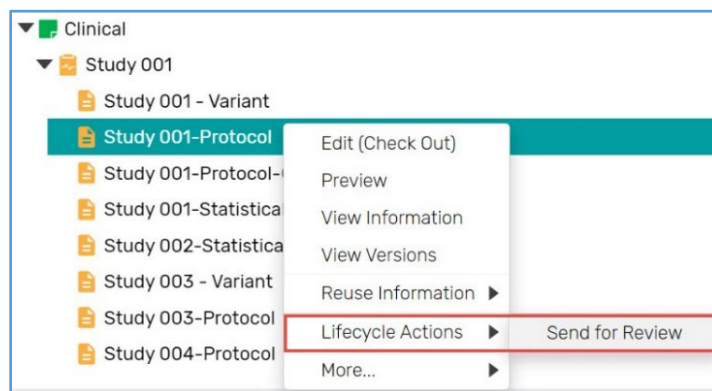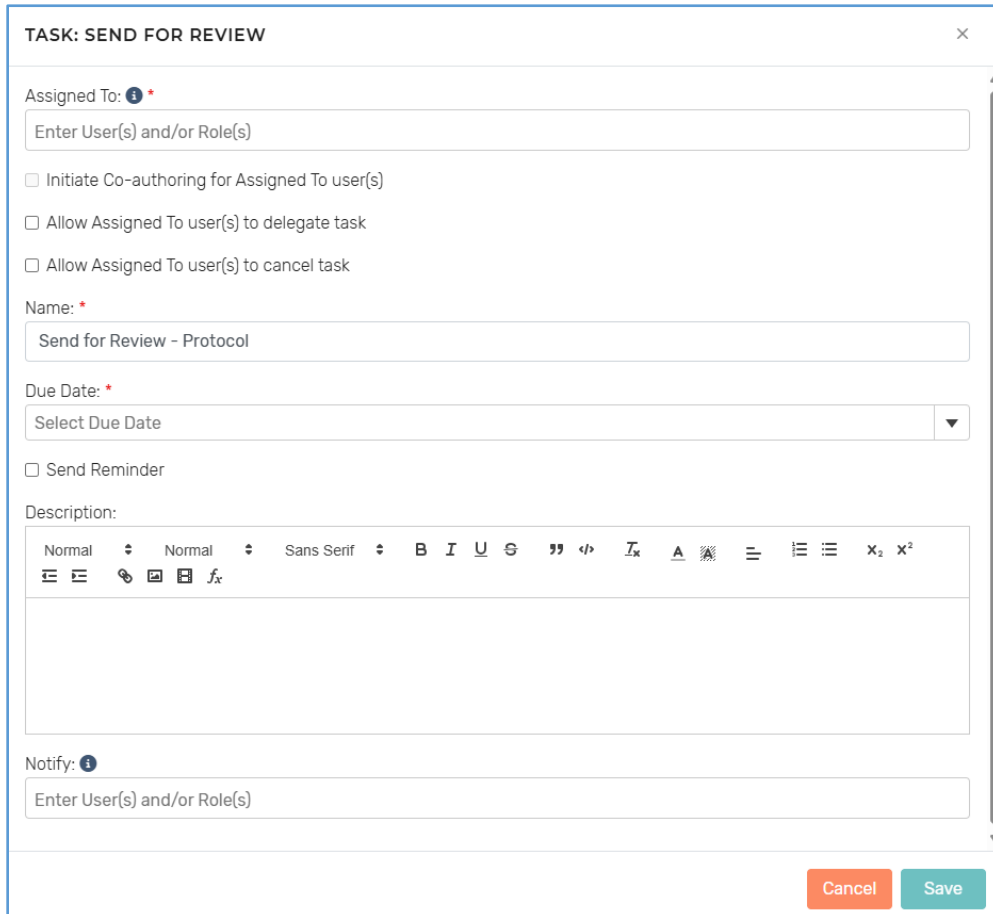

> **Note:** The actual lifecycle action name (eg, 'Send for Review' or 'Send for Lock') is based on the client's configuration and therefore may vary.

A new **Task** window opens as shown below. The user must enter or select the task-based information *as described in the following sections* based on whether the task is to be initiated in tandem with co-authoring or not.

Notes:

- **Reviews** may also be completed in the *PleaseReview* platform; see Section 2 for instructions on this type of collaborative review.

- When the document's state changes to an '**approved**' state type, the current version of any associated component is pinned or locked to the document. Therefore, it is recommended to either:

  - Have a lifecycle rule configured so that the state of the document's editable components also changes to an 'approved' state along with the document (see Section 1.3.1 for further details) *OR*

  - First 'approve' the editable components *before* initiating the 'approval' task for the document, and then edit/checkout the document in single authoring to refresh in the
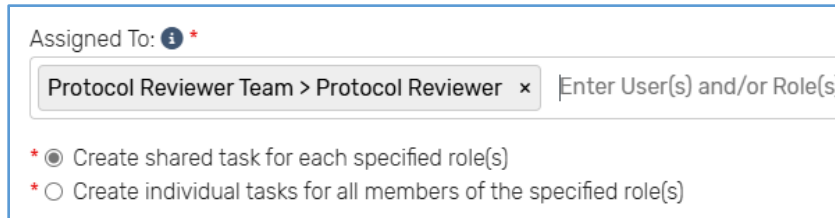
> latest version of the components (ie, the 'approved' versions) to ensure that the newer versions get pinned to the document upon its approval.
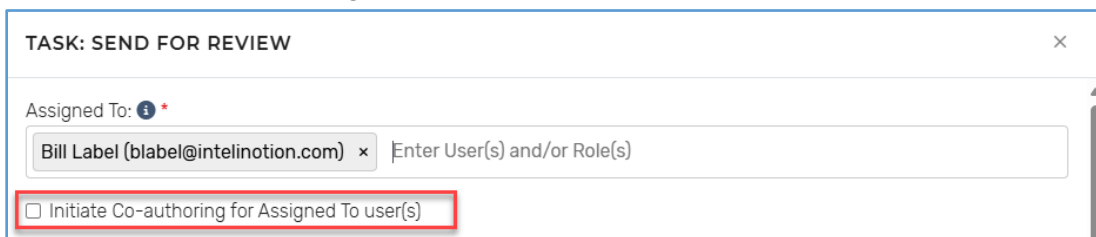
1.1.1 Initiating a Task without Co-Authoring

If a user wants to create a task for a document and enable multiple users to edit it at the same time, the task must be initiated with co-authoring; see Section 1.1.2 below for details on how to complete this step. If the intention is for each task assignee to edit the document individually, however, or for a task initiated for a component, the task must be initiated without co-authoring.

After the **Task** window opens, enter the following details:

1. **Assigned To –** Enter the names of the user(s) and/or role(s) to assign the task.
   a. If a role is entered, 2 additional checkboxes will appear:
      i. **Create shared task for each specified role(s)** – check this box to create a single, shared task that gets assigned to all members of the specified role(s); once 1 of these users 'claims' the task, the shared task will be converted to an individual task for that user only.
      ii. **Create individual tasks for all the members of the specified role(s)** – check this box to create an individual task for each member of the specified role(s).

2. **Initiate Co-authoring for Assigned To user(s)** – Leave the box <u>**unchecked**</u> to initiate the task <u>without</u> co-authoring.

> **Notes:**
> - This checkbox appears only if the task is for a document and tandem co-authoring has been pre-configured for the selected lifecycle action.

> - If a task is initiated without tandem co-authoring, the user will not be permitted to initiate co-authoring on the document until all open tasks are completed, auto completed or canceled.

3. **Allow Assigned To user(s) to delegate task** – if checked, this allows the assigned user to delegate an assigned task to another user, as appropriate.

4. **Allow Assigned To user(s) to cancel task** – if checked, this allows the assigned user to cancel a task without completing it, if needed.

5. **Name -** The task name auto-populates as a combination of the selected Lifecycle Action Name plus the document/component name. It can be modified if needed.

Name: *

Send for Review - Study 001-Protocol

6. **Due Date -** Select a due date for the task using the date picker.

Due Date: *

2021-12-08 ▼

December, 2021 ▼					◀ ● ▶	
Sun	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**
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

7. **Send Reminder -** Check this box to send a task reminder before and/or after the selected due date.

   a. **Send before due date (# days) -** Check this box to send a reminder before the due date. Also, enter the number of days (eg, 2) before the due date, when the reminder should be sent.

   b. **Send after due date (# days)** - Check this box to send a reminder after the due date. Also, enter the number of days (eg, 2) after the due date, when the reminder should be sent.

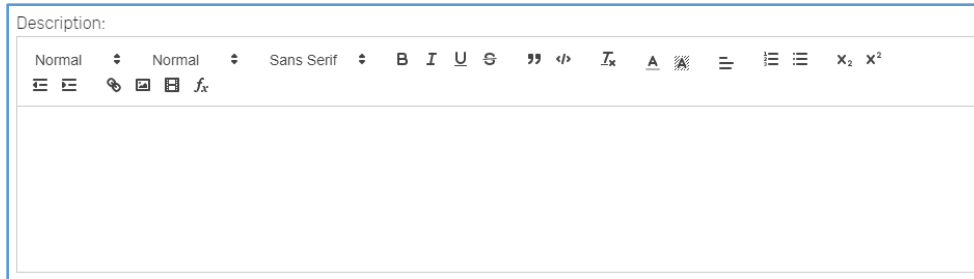☑ Send Reminder

☑ Send before due date (# days)   2

☑ Send after due date (# days)   5
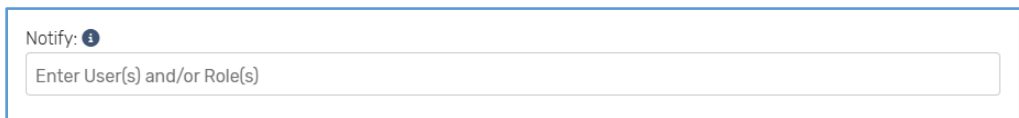
![InteliNotion logo]

8. **Description -** Enter an appropriate task description.

Description:

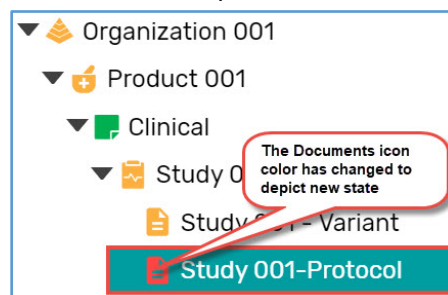| Normal | Normal | Sans Serif | B I U S 99 </> Ix A ☒ ≡ ≣ ≣ x₂ x² |
| 至 至 ⬙ 🖼 ⊞ fx |

9. **Notify -** Enter the names of the user(s) and/or role(s) to send a notification about the task being assigned.
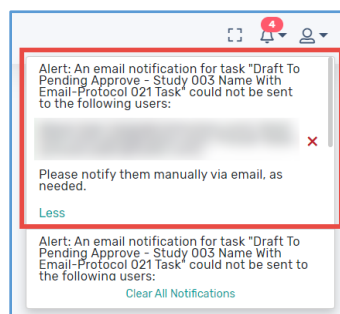
Notify: ⓘ

Enter User(s) and/or Role(s)

10. Once finished entering the required information in the window, click **Save**.

11. After the task has been created successfully, the color of the document's icon will change to reflect a new lifecycle state based on configuration (eg, it may change from **Draft** to **Pending Review**). Since the task was initiated <u>without</u> co-authoring, each task assignee will need to **Edit** the document (or component) individually via in single authoring.

▼ 🔷 Organization 001
  ▼ 🔶 Product 001
    ▼ 🟩 Clinical
      ▼ 📋 Study 0   The Documents icon color has changed to depict new state
         📄 Study - Variant
         📄 Study 001-Protocol

Note: If a task notification email or notification email for a user is not sent by the system, an alert will be displayed for the user who initiated the task, under the **bell icon**, so he/she can send a manual notification if needed.
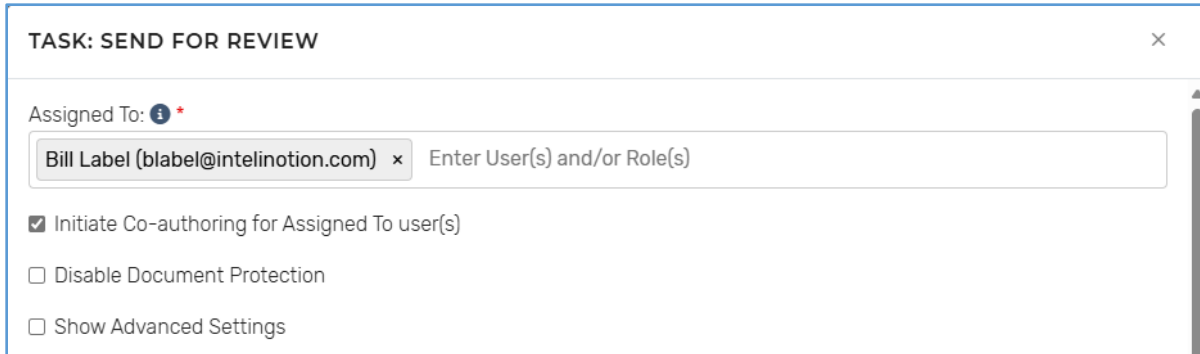
Alert: An email notification for task "Draft To Pending Approve – Study 003 Name With Email-Protocol 021 Task" could not be sent to the following users:

×

Please notify them manually via email, as needed.

Less

Alert: An email notification for task "Draft To Pending Approve – Study 003 Name With Email-Protocol 021 Task" could not be sent to the following users:
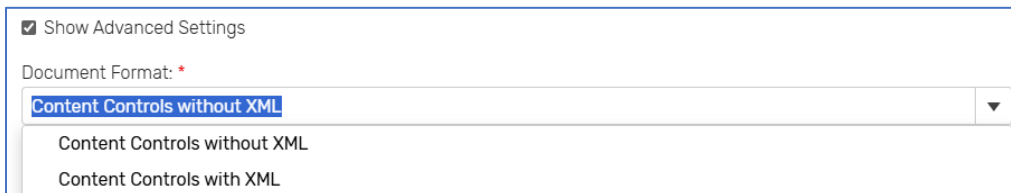
Clear All Notifications

1.1.2 Initiating a Task with Co-Authoring (Document Only)

To create a task for a document and enable multiple users to edit it at the same time, the task must be initiated in tandem with co-authoring. To do this, follow the same steps outlined in Section 1.1.1 above, however, the **Initiate Co-authoring for Assigned To user(s)** checkbox must be **checked** in step 2 as shown below.

In addition, 2 new checkboxes may appear based on configuration:

- **Disable Document Protection** – See Section 3 for details on this functionality.
- **Show Advanced Settings** – If switching the document format (ie, 'without XML' or 'with XML') is configured to be available, this checkbox will appear allowing the user switch the default format, as needed.

> **Notes:**
>
> - With tandem task creation and co-authoring, assigned users will not receive a separate co-authoring invitation email, but instead will receive a single new task email notification (if configured).
> - If at least 1 role is entered in the Assigned To field, tandem co-authoring is not permitted.

If any of the following <u>actions</u> are <u>performed before all tasks are completed</u>, the indicated outcomes in the table below will occur:

Action	No users have completed a task	At least 1 user has completed his/her task	All users have completed their tasks
Delegate Task	The task will be delegated to the new user indicated, and he/she will be added as a co-author. The prior user's task will be canceled, and he/she will be removed as a co-author. Note: This function should only be performed for single users	The task will be delegated to the new user indicated, and he/she will be added as a co-author. The prior user's task will be canceled, and he/she will be removed as a co-author.	N/A
Cancel Task	A confirmation message appears indicating: **The assigned users will be notified of cancellation. Are you sure you want to cancel the selected task(s)?** After confirming, the user's task will be canceled, and he/she will be removed as a co-author.	If the task being canceled is the <u>last</u> task to be completed, a confirmation message appears indicating: **The associated object(s) state will change after canceling the selected task(s) and the assigned users will be notified of cancellation. Are you sure you want to cancel the selected task(s)?** After confirming, the user's task will be canceled, and he/she will be removed as a co-author.	N/A

Action	No users have completed a task	At least 1 user has completed his/her task	All users have completed their tasks
Finish Co-Authoring *(can be performed by the task initiator, admin, or authorized user)*	A confirmation message will appear indicating: **If co-authoring is finished, any open tasks will be auto completed, and the document's lifecycle state will transition forward accordingly.** Note: This option is <u>not</u> recommended.	A confirmation message that lists which users have not completed their tasks will appear, and indicate: **If co-authoring is finished, any open tasks will be auto completed, and the document's lifecycle state will transition forward accordingly.**	A confirmation message will appear indicating: **Are you sure you want to finish co-authoring?** Note: The document will have already transitioned to the next lifecycle state after the last user completed his/her task.
Cancel Co-Authoring *(can performed by the task initiator, admin, or authorized user)*	A confirmation message will appear indicating: **If co-authoring is canceled, any open tasks will be canceled, and the document's lifecycle state will revert back to the prior one.**	A confirmation message that lists which users have not completed their task will appear, and indicate: **If co-authoring is canceled, any open tasks will be canceled, and the document's lifecycle state will revert back to the prior one.**	A confirmation message will appear indicating: **You are attempting to cancel co-authoring, however, all assigned users have already completed their tasks. Therefore, co-authoring should be finished instead.** Note: This option is <u>not</u> recommended.

Note: Although tandem co-authoring can be configured for a document's 'approval' task, it is <u>not</u> recommended. If co-authoring needs to be initiated along with an approval task, however, the following steps must be followed to ensure that the document's lifecycle state does not revert to 'Draft' after all approval tasks are completed and co-authoring is finished:

1. The task initiator must add him/herself to the approval task (ie, enter name in the **Assigned To** field of the task form).

2. After all assigned users *except for* the task initiator have completed their tasks, the task initiator must <u>finish</u> co-authoring on the document.

3. Once co-authoring is finished, the initiator's task will be auto completed, and the document's lifecycle state will transition accordingly (eg, progress forward to **Approved**).
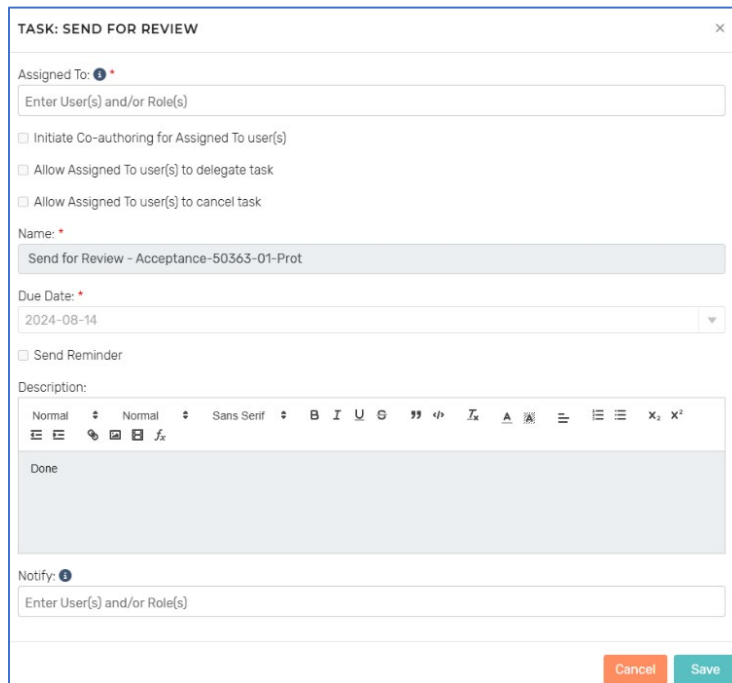
1.2 MANAGING OPEN TASKS

1.2.1 Adding Additional Users and/or Roles to an Open Task

The task initiator, an admin, or authorized user can add more users and/or roles to an open task (ie, not yet completed by all assignees) associated with a document or component; this is true for any open task, including tasks that are past the due date. This action can be done following the same steps in the *InteliNotion Word App* (as detailed below) as well as the *Web Console* (note that there may be minor UI differences in the console view).

1. In the **Navigator**, locate the relevant document (or component), right-click on it, and click on **View Tasks**.

2. In the **Task List** page that opens, click on the **plus sign icon** ⁺ at the top-right corner to add a new user to the open task.
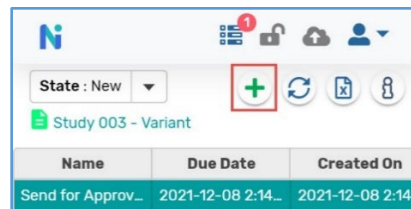
3. A **Task** form will display and is prepopulated with the same information entered in the original task form. The **Name**, **Due Date**, **Reminder** info, and **Description** fields are read-only, and the **Send Reminder** checkbox is disabled.

Notes:

- If tandem co-authoring was done, then the **Initiate Co-authoring for Assigned To user(s)** checkbox will be displayed and auto checked.
- Additional users can be assigned to an open task, even if its task reminder due date has passed.

4. Enter the following <u>new</u> details in the form and then click **Save**.

   a. **Assigned To -** Enter the names of the user(s) and/or role(s) to additionally assign the open task.

   b. **Notify -** Enter the names of the user(s) and/or role(s) to send a notification about the task being assigned.

5. After clicking **Save**, a new task is displayed for each of the newly assigned users in the **Task List** page for the document or component.
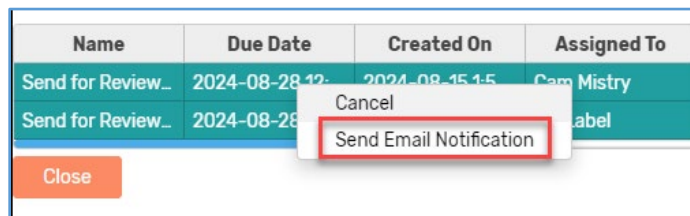
Note: If tandem co-authoring is set, the user will automatically get added to co-authoring session.

1.2.2 Emailing Task Assignees

The task initiator, an admin, or authorized user can send an email to selected task assignees. To do this, use **Ctrl + click** or **Shift + click** to select multiple task rows, and then right-click and select **Send Email Notification**.
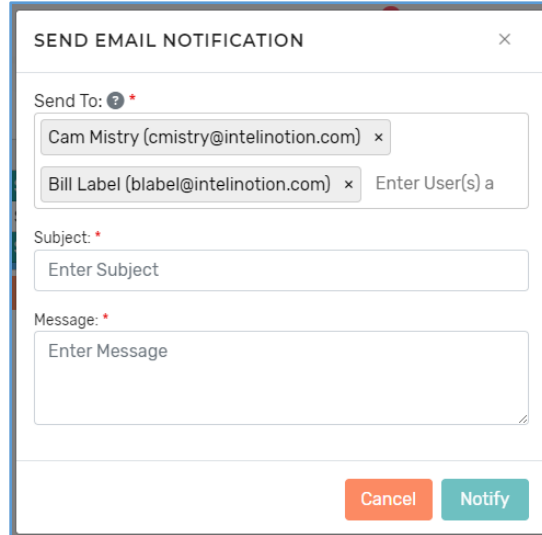
The selected user(s) will be pre-populated in the **Send To** field; add or remove other names, as needed. Enter the relevant text in the **Subject** and **Message** fields and then click **Notify** to send the email.
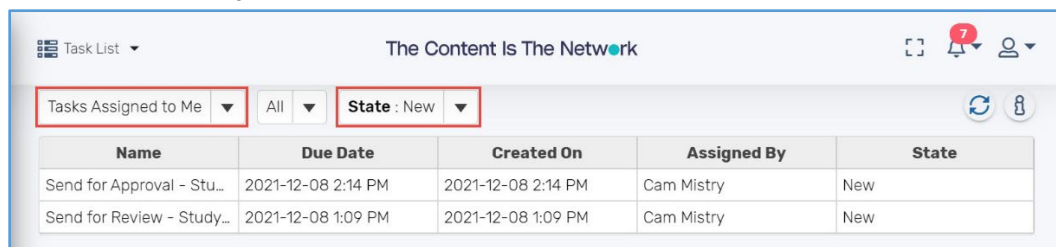

1.2.3 Delegating an Open Task

The task initiator, an admin, or authorized user can delegate an open task (ie, not yet completed by all assignees) associated with a document or component to another user only. In addition, a task assignee may delegate his/her own task if enabled when the task was created. This action can be done following the same steps in the *InteliNotion Word App* (as detailed below) as well as the *Web Console* (note that there may be minor UI differences in the console view).

1. In the **Navigator**, locate the relevant document (or component), right-click on it, and click on **View Tasks**.

   - Alternatively, a user's individual task may be accessed by going to **My Workspace** in the left-hand navigation pane, double-clicking **Task List**, then filtering the tasks to **Tasks Created by Me** and **State: New** as seen below.

2. **Double-click** on the relevant task to open it, or right-click on it and select **View Information**.
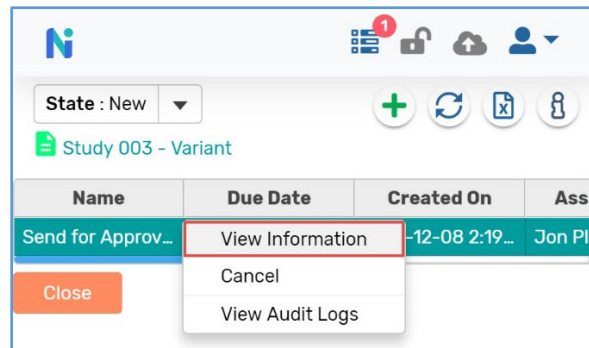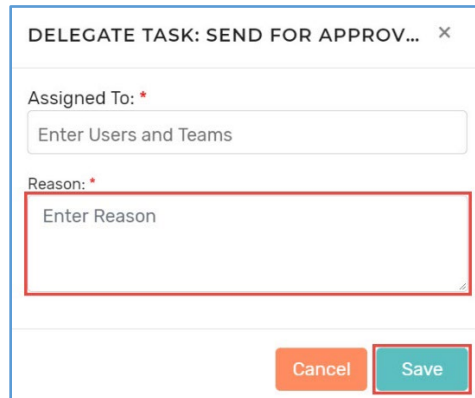

3. In the open task, click **Delegate** in the top-right corner.

4. A **Delegate Task** form will open. Enter the following details in the form and then click **Save**.

   a. **Assigned To -** Enter the name of the user to whom the task is to be delegated.

   b. **Reason -** Enter a suitable reason for task delegation.

5. After clicking **Save**, the original task assignee will receive a task delegation notification indicating that his/her task was delegated.

> **Notes:**
> - The original task's state will change to **Canceled** in the **Task List**, and a system-generated comment will be included with the reason for the delegation.
> - If applicable, the user will also be removed from the tandem co-authoring session after his/her task is delegated. Exception: if the task/co-authoring initiator has his/her task delegated, he/she will remain in the co-authoring session so that the **Finish Co-Authoring** action can still be performed.

6. The new task assignee will also receive an email notification notifying him/her about the new task assignment.

1.2.4 Canceling an Open Task

The task initiator, an admin, or authorized user can cancel an open task (ie, not yet completed by all assignees) associated with a document or component. In addition, a task assignee may cancel his/her own task if enabled when the task was created. This action can be done following the same steps in the *InteliNotion Word App* (as detailed below) as well as the *Web Console* (note that there may be minor UI differences in the console view).

1. In the **Navigator**, locate the relevant document (or component), right-click on it, and click on **View Tasks**.
   - Alternatively, a user's individual task may be accessed by going to **My Workspace** in the left-hand navigation pane, double-clicking **Task List**, then filtering the tasks to **Tasks Created by Me** and **State: New**.
2. To cancel a task:
   a. For an individual task – right-click on the relevant task and click **Cancel**, or alternatively, open the single task and click **Cancel.**
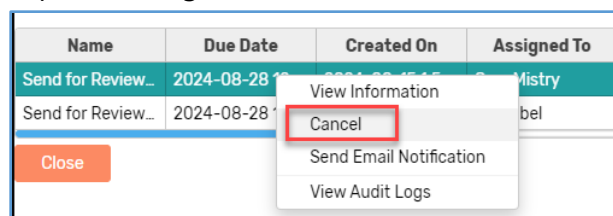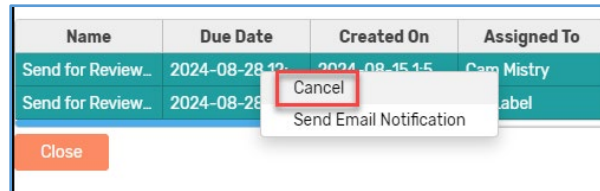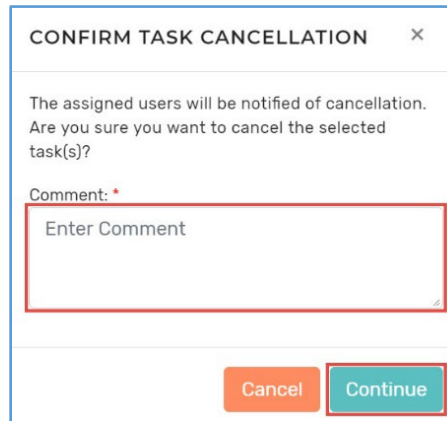
b. For <u>multiple</u> tasks at once – use **Ctrl + click** or **Shift + click** to select multiple task rows. Then, right-click on one of the selected rows and select **Cancel**.

3. Enter a **Comment** stating the reason for task cancellation and then click **Continue.**

4. The original task assignee, as well as the user whose task was canceled, will both receive a task cancellation email notification.

> **Notes:**
>
> - The original task's state will change to **Canceled** in the Task List, and a system-generated comment is included with the reason for the cancellation.
> - If applicable, the user will also be removed from the tandem co-authoring session after his/her task is canceled. If a non-admin co-authoring initiator has his/her task canceled, he/she will be removed from the session but will still be able to invite more users, and finish/cancel co-authoring on the document via the right-click menu.

## 1.3 COMPLETING A TASK FOR A DOCUMENT OR SINGLE COMPONENT

A task may be completed for a document or component via either the *InteliNotion Word App* or *Web Console.*

Users are notified of a newly assigned task via email and/or the *Web Console's* **notification icon** depending on the system's configuration. If an email notification is configured, the email itself may include a direct link to the task, such as co-authoring, as shown in the example below.
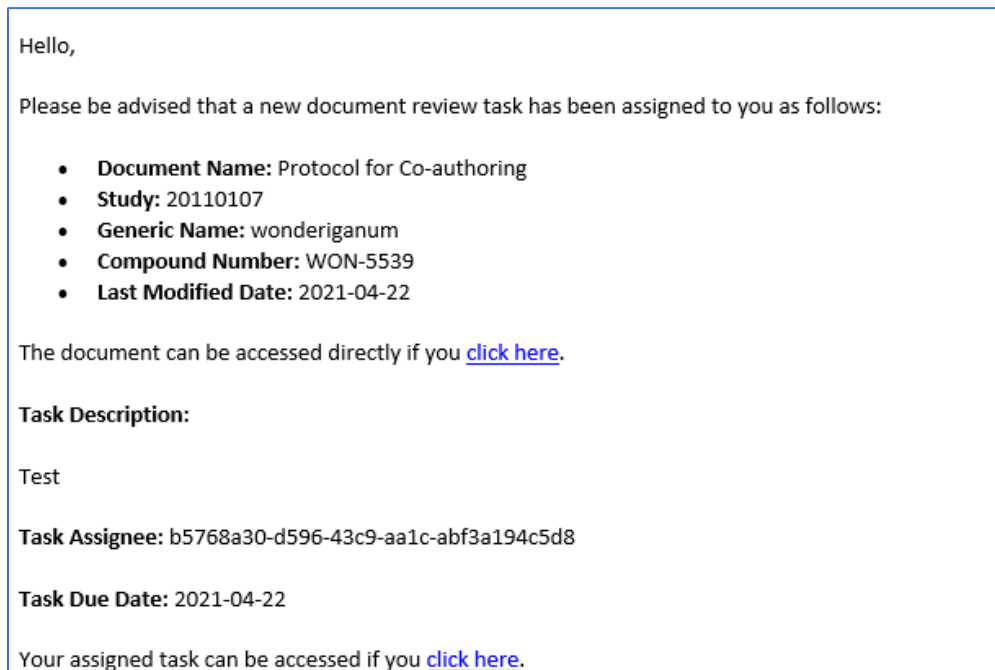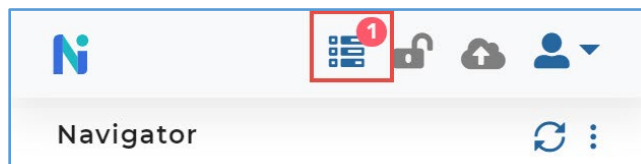

If a console notification is configured, the user will see a new or updated badge (ie, existing number increments by 1 digit) in one of the two following places.

- The top-right corner of the *Web Console* where the **Notifications** icon is located.
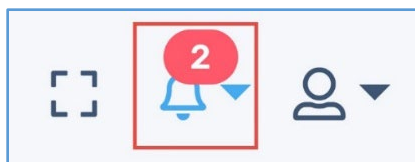
- The top-right corner of the *InteliNotion Word App* where the **My tasks** icon is located.
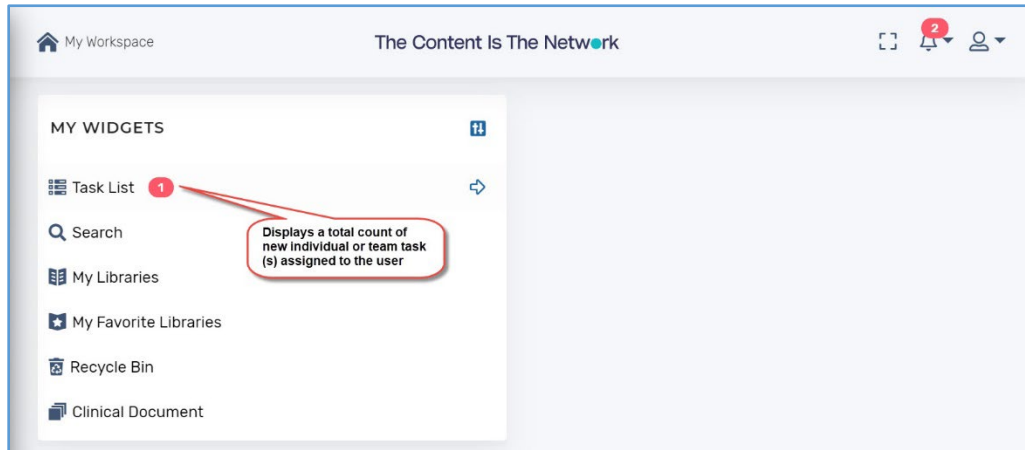
To view and complete an assigned task, the user can either:

1. Click the task's URL (if available) in the email or console notification itself.

2. Browse to find the task in the *Web Console* or *InteliNotion Word App* as follows:

    a. Web Console – Go to **My Workspace** and double-click **Task List**.

    b. Word App – Click the **My tasks icon** as indicated below.
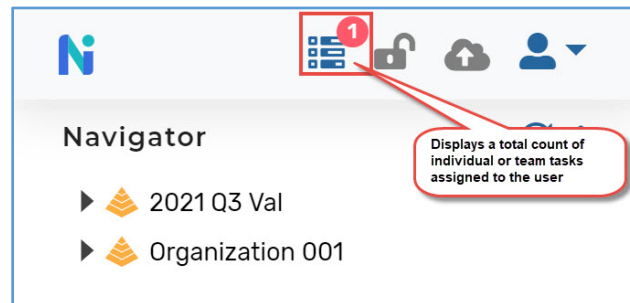
3. A new display will open and list the tasks assigned to the current user by default (as shown below in the *InteliNotion Word App*).
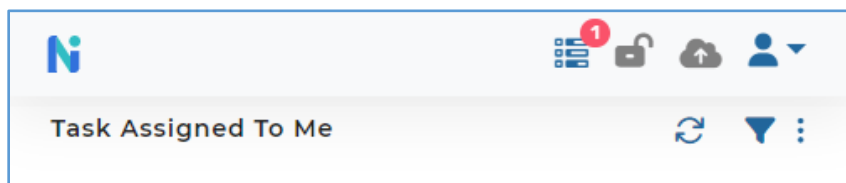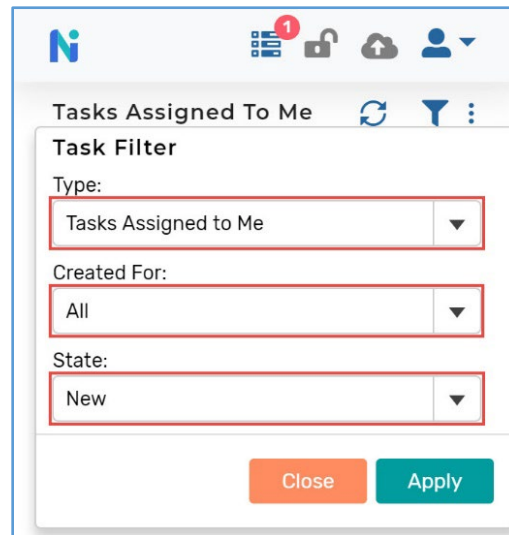

4. If desired, click the **filter icon** to filter the displayed tasks as follows:

    a. **Type** – Use to filter Tasks Assigned to Me (ie, current user), Shared Tasks, and Tasks Created by Me.

    b. **Created For** – Leave the default selection **Object Tasks** to ensure all tasks for documents and components are listed.

c. **State** – Use to filter tasks by state (**All**, **Auto Complete**, **Canceled**, **Complete**, and **New**).

> **Note:** The user can click the **refresh icon** ⟳ to refresh the list of tasks.

5. To <u>complete</u> the open task, ensure that the selected filters (dropdowns) are set to the following (this is the default setting if filters were not changed as described above):

- Tasks Assigned to Me
- All
- New

6. Double-click on the relevant task to open it, or right-click on it, and select **View Task Information**.

7. In the open task, click on the document (or component) listed under **Associated Object(s)** and then use the **vertical ellipsis ⋮** to view available actions such as Edit. (Note that there may be minor UI differences in the *Web Console* view.)
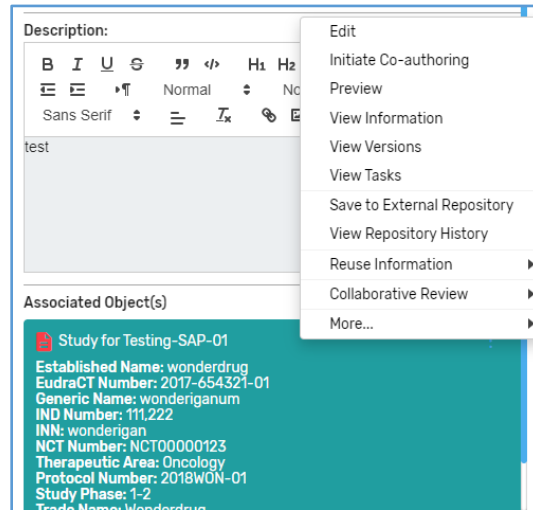
> **Note:** If the **checked-out padlock icon** is displayed beside the associated object, it is currently checked out for single editing by a user; otherwise, the **Edit** right-click menu option will be available. If the **co-authoring icon** is displayed beside the associated object (for documents only), the **Edit** right-click menu option will be available.

8. Based on how the task was initiated, edit/open the document (or component) in either single authoring or co-authoring via **Edit**, and then use *MS Word*'s comments and Track Changes functionality available on the **Review ribbon** to make any required edits, as appropriate.
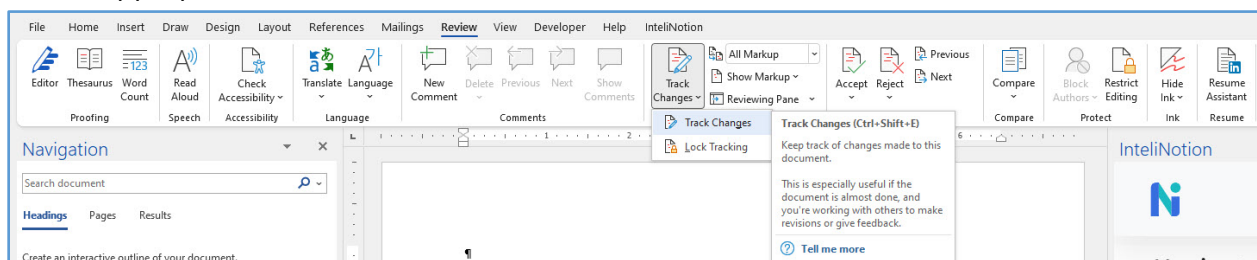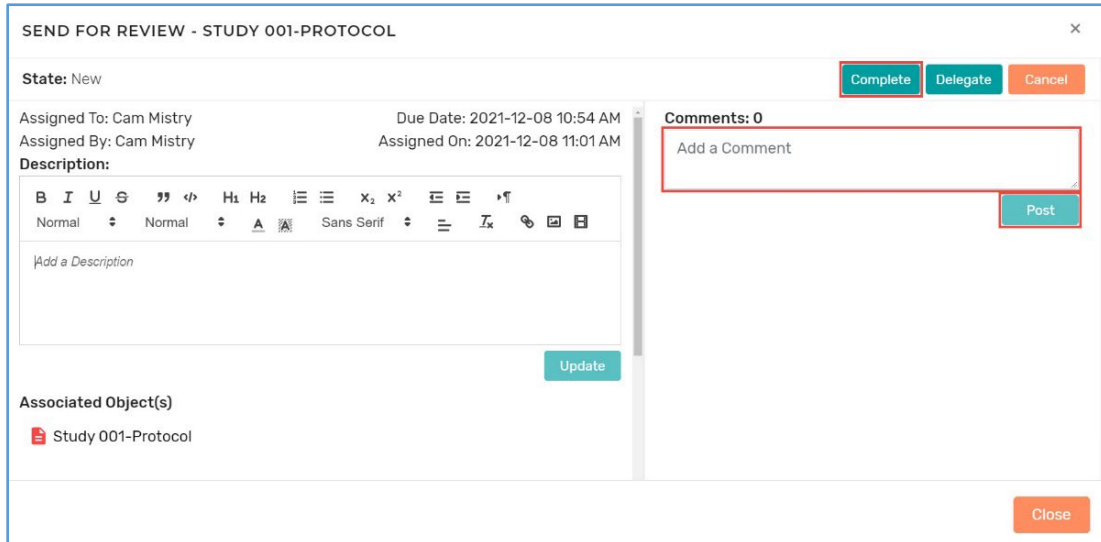

> **Note:** When working with Track Changes turned on, if a change is made that will <u>not</u> be marked as a change (eg, a component is moved), the user will be alerted with a message.
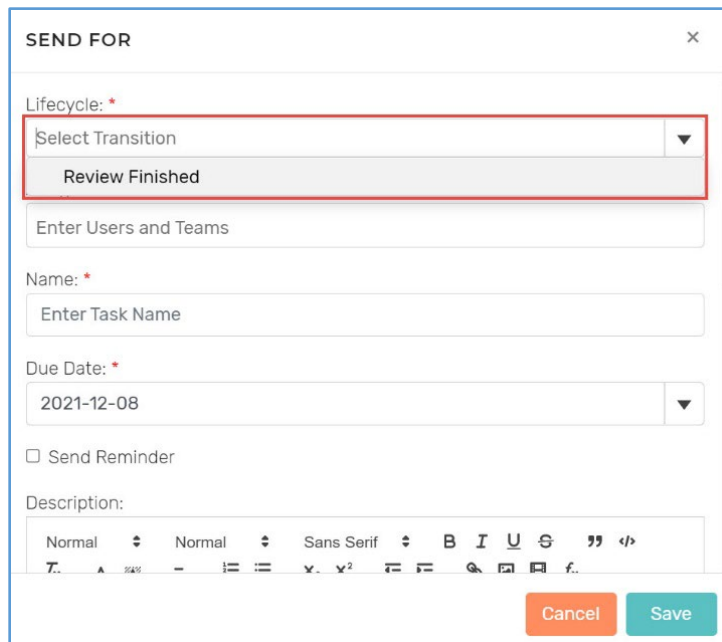
9. When done editing, **Save & Check In** the document if in single authoring mode (see Module 5 Section 2.1 for details) or just **close** the document if in co-authoring mode (see Module 5 Section 3.9 for details).

10. Return to the open task and enter any relevant comments, if needed, and click **Post**.

11. When ready to finish the task, click **Complete.** In the new window that opens, click the **Lifecycle** dropdown and select the appropriate transition (eg, **Review Finished**, **Lock Document**).
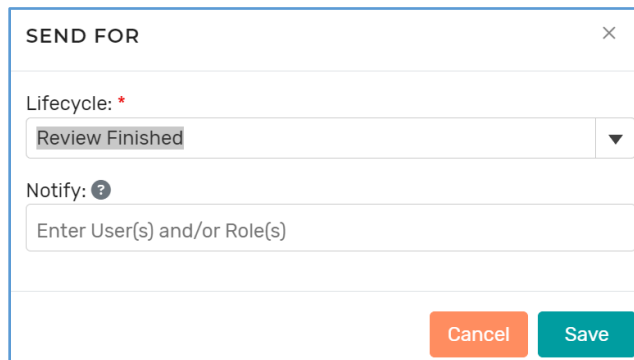
> **Note:** Depending on the document's lifecycle configuration, an '**approval**' task may have 2 types of transitions to select from when completing the task (eg, 'Approve' and 'Reject'). If this is the case, the document's state does not transition forward (eg, changed to 'Approved') unless <u>all</u> users assigned the task select the forward transition (eg, 'Approve'); if at least 1 user selects the alternate transition (eg, 'Reject') then the document's state transitions back to a predefined state (eg, 'Draft').

12. Based on the selected transition, the form updates to remove unnecessary fields (eg, if a new task is to be created based on the selected transition, the name and other required fields stay). Enter the users or roles to notify about the task's completion, if applicable, and then click **Save**.
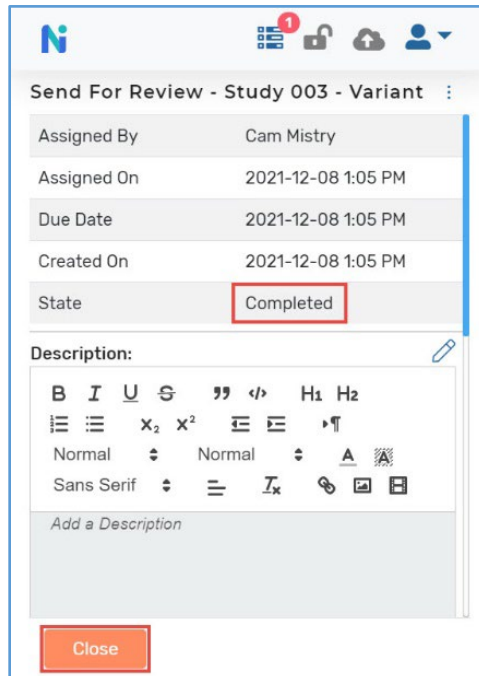

13. After clicking Save, the task's state changes to Completed. Click **Close** to continue.

14. To view a completed task, select **Completed** in the **State** dropdown filter.

   a. If needed, double click on a task to view any user and/or system-generated comments that may provide necessary information about task completion.

> **Note:** Once a task has been completed, it cannot be removed.

1.3.1 Post Task Completion

When all assigned users complete their tasks, the following will occur:

1. The task initiator will receive an 'All tasks completed' system-generated email.

2. The document's lifecycle state will transition immediately to a new state based on the system's configuration (eg, from **Pending Review** to **Reviewed**), and the color of the document's (or component's) icon will automatically refresh to reflect the new state as well.
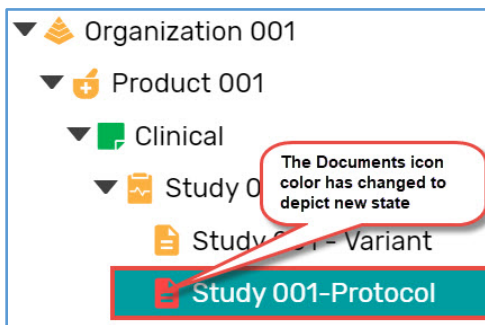
3. When viewing the version history (ie, using **View Versions**) for the document (or component), system-generated comments will be included to indicate which user first initiated the task, and which user(s) completed the task.

In addition, after the document's lifecycle state changes, the state of its editable components may also transition automatically to a predefined state, if configured. This behavior is typically configured for when the document state is changed to an 'approved' type state (eg, 'Document Locked').

The <u>owner</u> of the document will receive an email to confirm that the lifecycle state of all editable components transitioned successfully. If the state of any of the editable components did not transition with the document, however, the email will list these components along with the reason why the lifecycle state remained the same, as shown in the example email below.

From: InteliNotion Service <<u>service@intelinotiondev.onmicrosoft.com</u>>
Sent: Monday, April 17, 2023 11:50 AM

Subject: Warning: Component(s) lifecycle state not transitioned with document 'Study 2018WON-01-Protocol-Demo-06Apr2023'

CAUTION: This email is from the external sender. Exercise caution with links and attachments.

The lifecycle state of document 'Study 2018WON-01-Protocol-Demo-06Apr2023' was transitioned successfully to state 'Locked'. However, the state of the following components could not be transitioned due to the following reason(s):

Component Name	Reason for No State Transition
AE Grading Scale	Component is as is reused in the document
Analyses Adverse Events	Component is as is reused in the document

Any components that did have their state automatically transitioned will include a relevant comment in their version history.

Notes

- After initiating a task for a document or component, if the object's information (ie, properties) is manually updated, any open tasks will be autocompleted by the system. The task assignee will receive an email notification advising him/her of this action.
- A user assigned a task for a component will <u>not</u> be able to edit the component directly from the task if either of the following conditions is met:
  o Its source document is currently checked out for single or co-authoring, for components generated as part of a document.
  o It is from a managed library (ie, was created as part of a managed library *only*).

1.4 INITIATING AND COMPLETING A TASK FOR MULTIPLE COMPONENTS AT ONCE

If needed, a task can be initiated for multiple components of the same document at one time via the *InteliNotion Word App* or *Web Console*. To do this, follow the steps below.
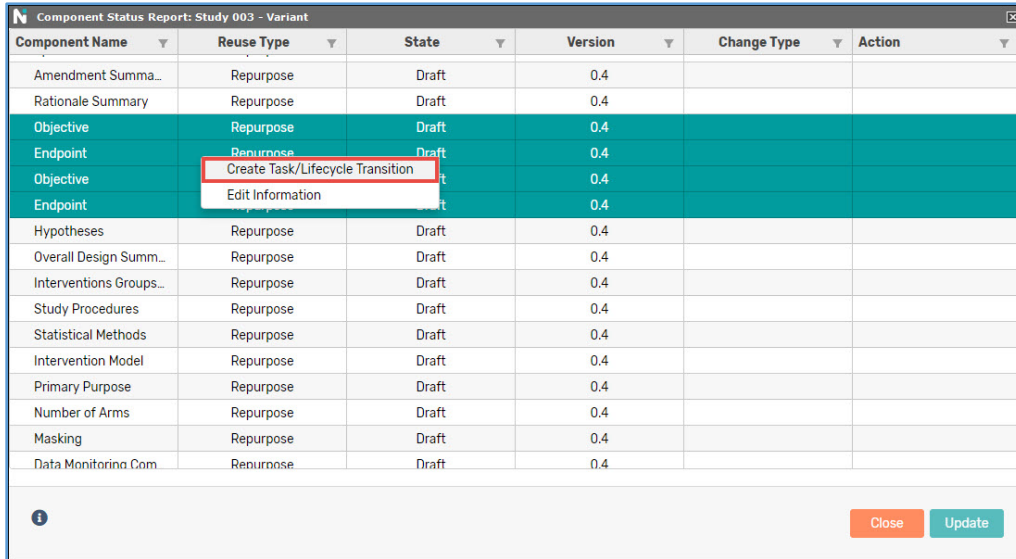
1. From the **Navigator**, double-click on the relevant document name to open its **Component Status Report**.

2. Use **Ctrl + click** or **Shift + click** to select the relevant component rows in the **Not Modified** section. (Note that it is recommended to initiate tasks for components listed in the Not Modified section instead of any modified section, to minimize confusion by introducing two types of changes for a given component.) Then, right-click on one of the selected rows and select **Create Task/Lifecycle Transition**.

Component Name ▼	Reuse Type ▼	State ▼	Version ▼	Change Type ▼	Action ▼
Amendment Summa…	Repurpose	Draft	0.4		
Rationale Summary	Repurpose	Draft	0.4		
Objective	Repurpose	Draft	0.4		
Endpoint	Repurpose	Draft	0.4		
Objective	Create Task/Lifecycle Transition		0.4		
Endpoint	Edit Information		0.4		
Hypotheses	Repurpose	Draft	0.4		
Overall Design Summ…	Repurpose	Draft	0.4		
Interventions Groups…	Repurpose	Draft	0.4		
Study Procedures	Repurpose	Draft	0.4		
Statistical Methods	Repurpose	Draft	0.4		
Intervention Model	Repurpose	Draft	0.4		
Primary Purpose	Repurpose	Draft	0.4		
Number of Arms	Repurpose	Draft	0.4		
Masking	Repurpose	Draft	0.4		
Data Monitoring Com…	Repurpose	Draft	0.4		

Component Status Report: Study 003 - Variant
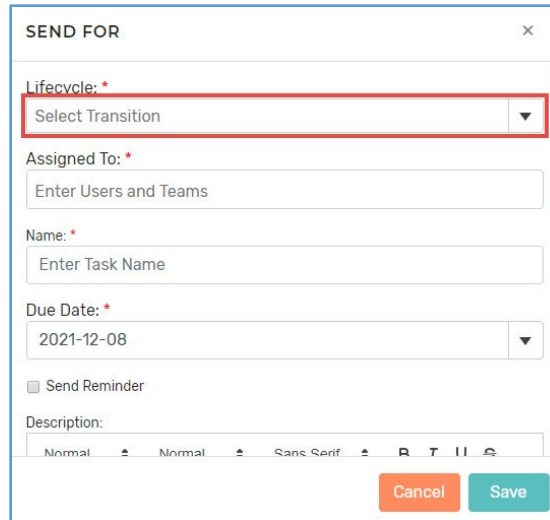
Close   Update

Notes:

- Components that are currently checked out, or that have a 'Use As Is' Reuse Type, can<u>not</u> have a task initiated for them. If a 'Use As Is' component needs a task initiated for it, this must be done via its source document's Component Status Report. If either of these types of components are selected, after right-click, the user will not be able to proceed with any action.

- The components selected for task initiation together must be in the same lifecycle state (eg, all must in 'Draft' state) <u>and</u> be the same type of 'business object' (eg, Clinical Component, as displayed in View Information), or the system will prevent the user from creating the task.

3. The **Send For** form will display.

4. Select the **Lifecycle** transition from those available in the drop-down list (eg, Send for Review), which are based on the system's configuration given the selected type of component.

5. Enter or select the remaining task-based information in the form, as described above in Sections 1.1.1 or 1.1.2 for a task without or with co-authoring, respectively.

6. Once finished entering the required information in the window, click **Save**.

7. After the task has been created successfully, the components' **State** will immediately change (eg, from **Draft** to **Under Review**), as well as their **Version**. The components will be listed in the **Modified** section, with their new state and version listed in parentheses (ie, for the individual component itself), next to their existing state and version (ie, for the component currently 'used' in the document).

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8. The assigned users will receive an email (see example below) and/or *Web Console* notification, based on the system's configuration.

9. The assigned users must then complete their tasks following the steps outlined in Section 1.3 above.

> **Note:** All components will show as **Associated Object(s)** in the task itself. When completing the task and selecting a relevant transition (eg, Review Complete), it will be applied to all components.

2. COLLABORATIVE REVIEW

InteliNotion provides the capability to perform a collaborative review of a co-authored document via external connector to Ideagen's *PleaseReview* platform. The sections below list the *PleaseReview* collaborative review functions available within and in conjunction with *InteliNotion*.

> **Notes:**
> - Before these functions are available, and admin must configure the external connector to the *PleaseReview* platform (see **InteliNotion Application Admin Guide Section 12.2**).
> - Admins have the ability to perform all functions of the PleaseReview collaborative review, with or without an account as long as the document is in an active review cycle.

2.1 INITIATING A COLLABORATIVE REVIEW

Collaborative review of a document in *PleaseReview* can be initiated directly from InteliNotion by following the steps below.

> **Note:** The collaborative review initiator/owner must have an account in *PleaseReview* with Author or a higher role. Any intended reviewers also must have an account in *PleaseReview*, however, are not required to have an account in *InteliNotion*.

1. In the *Web Console* Navigator or *Word* app, go to the document to be reviewed, right click, hover over **Collaborative Review** and click **Initiate New Review**.
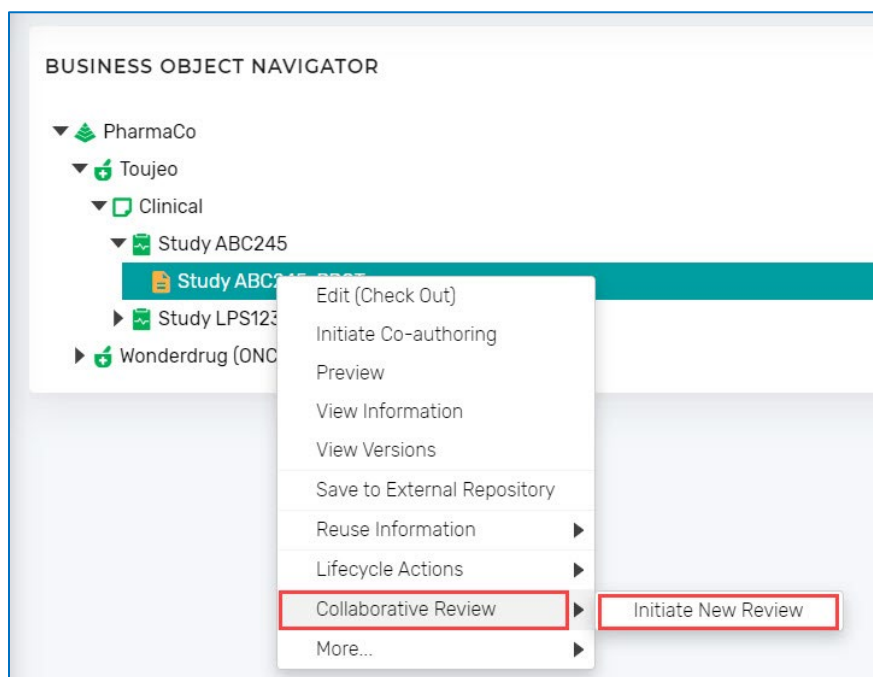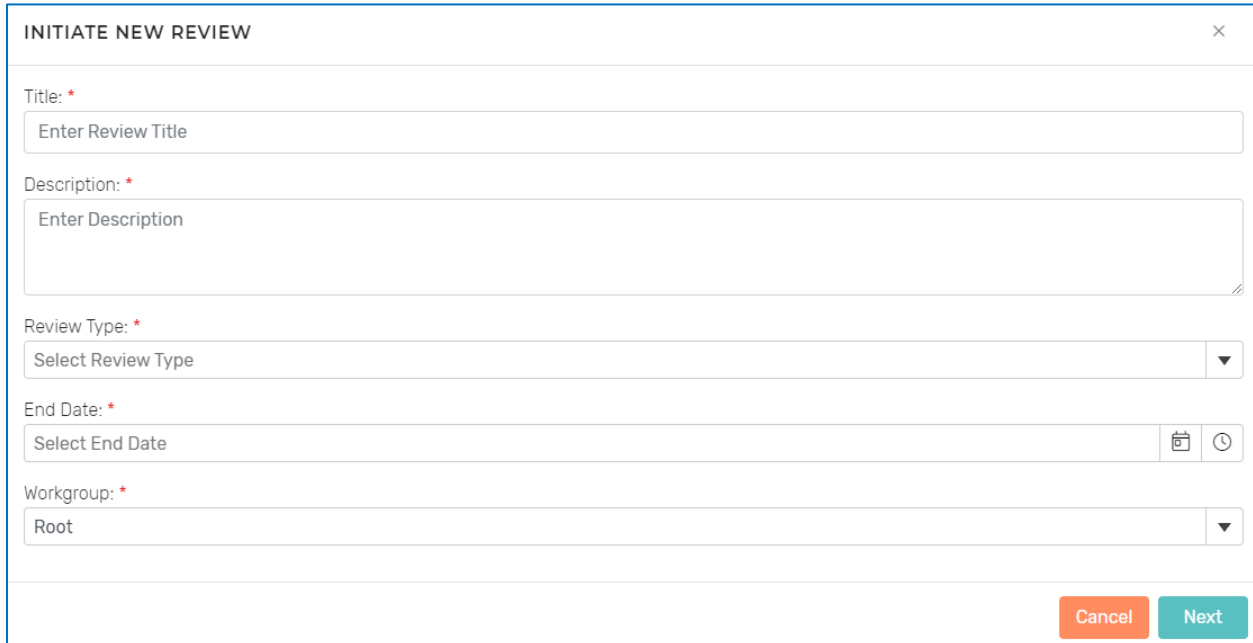
2. An **Initiate New Review** Form will display, fill in the **Title**, **Description**, and **End Date** for the review and click **Next**.

> **Note:** The contents in **Review Type** and **Workgroup** dropdowns will vary depending on the configuration.

3. The **Add Review Participants** form will display. The exact listing of the roles will vary depending on the configuration. Enter the names of the applicable users into the role Fields.

> **Note:** The user can enter a few characters to search, and the system will display matching users for selection. A user cannot be assigned a role higher than the one in *PleaseReview*. For example, a user in the **Reviewer** role in *PleaseReview* cannot be assigned the **Author** role in *InteliNotion*.

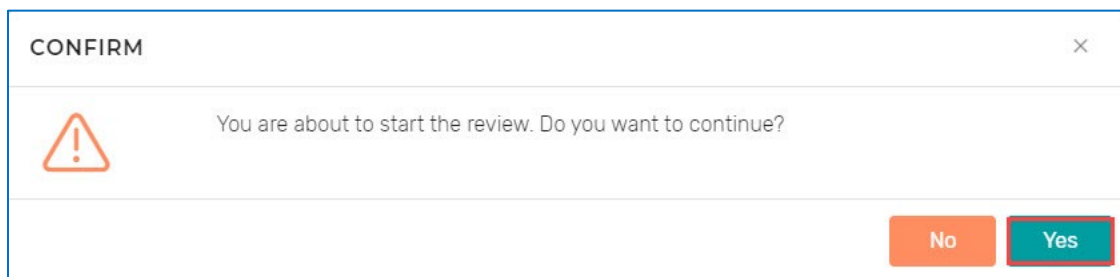4. Click **Save**.

-   To start the review process, in the *InteliNotion* navigator or *InteliNotion Word* app, right click on the document, hover over **Collaborative Review**, and click **Start Review**.

> **Notes:** Depending on the size of the document, it may take a moment or two for it to process in *PleaseReview* before the review can be started.
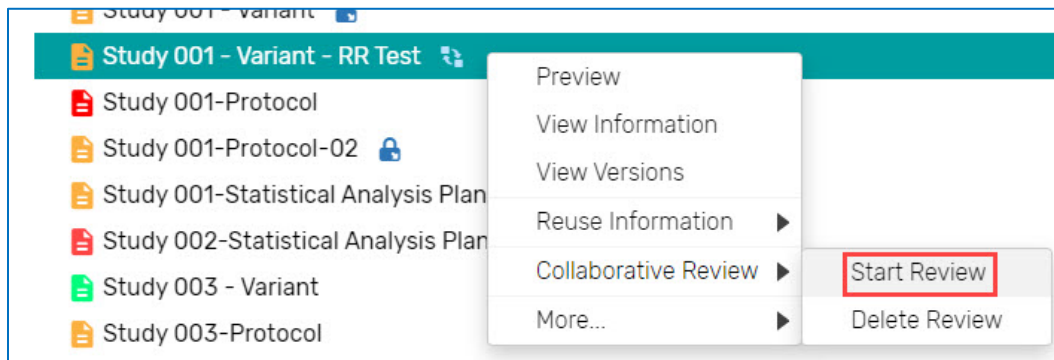
5. A confirmation pop up will display, click **Yes**.

6. An Info pop-up will display informing the initiator that the new review was successfully initiated. Either click on **click here** to open the review in the *PleaseReview* control panel or click **OK**.
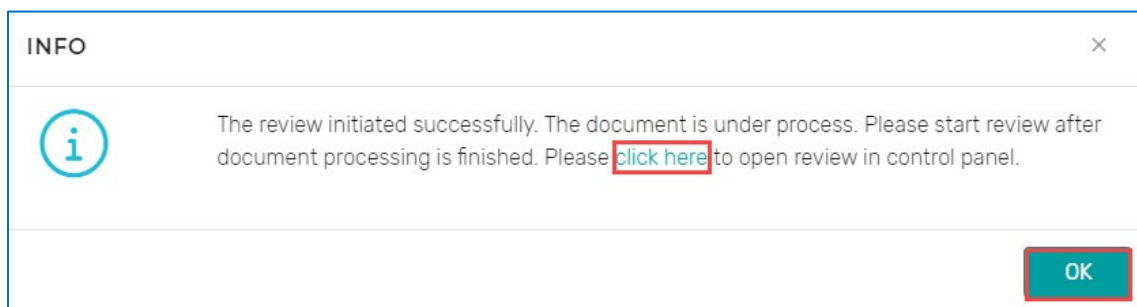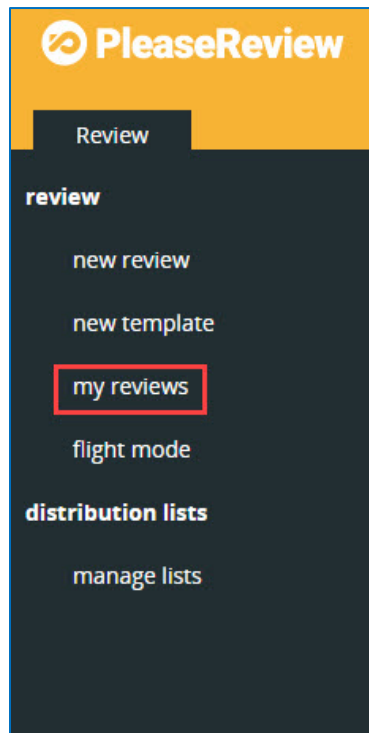

> **Note:** If the user clicks **Okay**, they will be redirected back to the *InteliNotion Web Console* and will have to open the *PleaseReview* program manually.

7. In the *PleaseReview* navigation pane, click on **my reviews**. This will bring up the review dashboard.

8. Click **Enter** to make changes to the document under collaborative review.
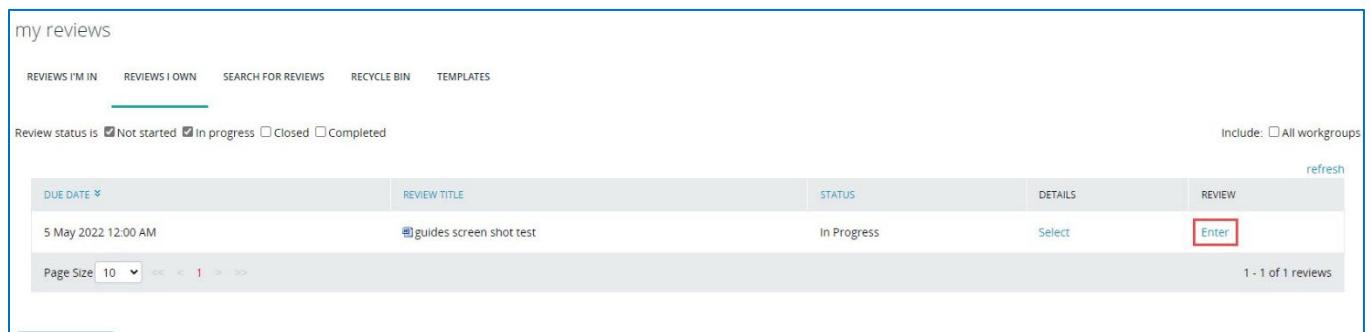
9. This will bring the user to the document under collaborative review. Make the applicable changes in the document.

> **Note:** All review functions for *PleaseReview* are out of the box and should be functional immediately upon creating the review once the document has processed into the *PleaseReview* system.

2.2 FINISHING A COLLABORATIVE REVIEW

After the changes have been made to the document under collaborative review in PleaseReview, a full control admin or the review owner can complete or discard a review in progress. Follow the steps listed below to finish a collaborative review.

1. In the *InteliNotion Web Console* or *Word* app, navigate to the document under collaborative review.

   > **Note:** documents in review with the PleaseReview program will have an icon indicator, as shown below.

2. Right click on the applicable document, hover over **Collaborative Review** and choose one of the following options.

   - To complete a collaborative review, follow the steps listed below.
     i. Click on **Complete Review**.

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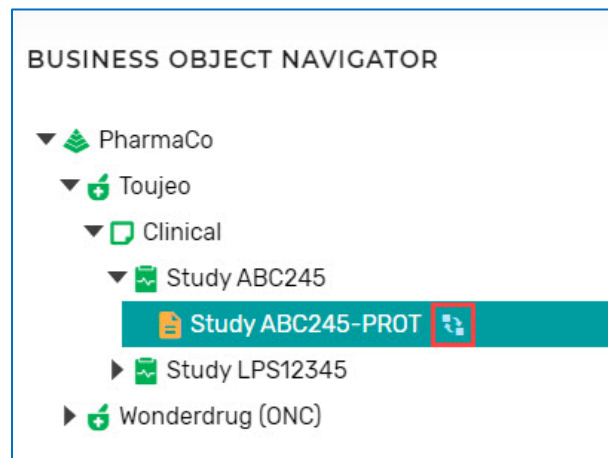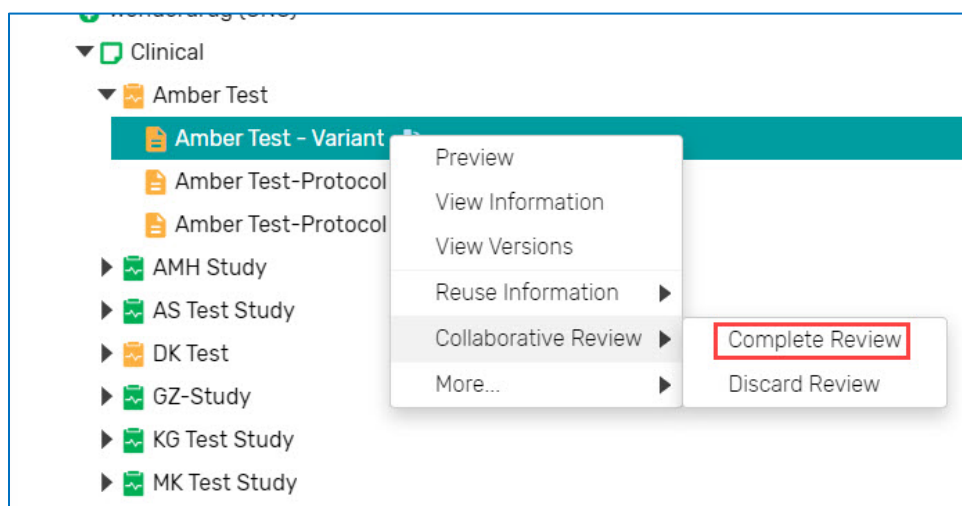
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ii. A pop-up warning will display; fill in the notes section and click **Complete Review** to complete the collaborative review.

iii. A pop-up will display informing the admin or review owner that the collaborative review has been completed.
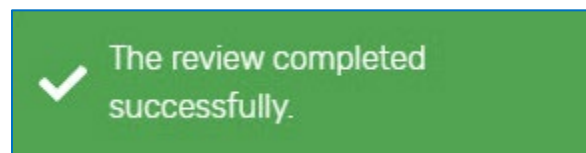
> **Notes:**
> - Any changes made during the collaborative review will be logged by *InteliNotion* and will be available to view upon completion via audit logs, up versioning, and version comments within the *Web Console* Navigator.
> - See Module 7 for more detailed steps on viewing versions and audit logs.

- To discard a collaborative review, follow the steps listed below.
  i. Click on Discard Review.
  ii. A warning message will display. Click **Yes** to discard the review.

iii. A pop-up will display informing the admin or review owner that the collaborative review has been discarded.
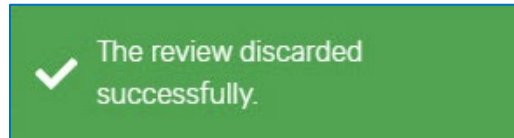
2.3 COLLABORATIVE REVIEW KNOWN BEHAVIORS

This section lists known issues with the collaborative review functionality using *PleaseReview*.

- Completing review marks the status as **Completed**, but there is option to reopen it in PleaseReview.

- The document preparation in PleaseReview fails for some documents.

- Document size in *InteliNotion* increases after completing a review cycle.

3. DOCUMENT PROTECTION

When a user edits the document in co-authoring using *Word Online*, this can lead to the document and/or some of its components becoming corrupted. To prevent this behavior, the document protection feature was implemented to 'protect' the document when it is edited in co-authoring. If protection is enabled for a document, the co-authoring initiator or authorized user (eg, a full-control admin, or a user with C-R-U-D-O access for relevant Document business object class) can toggle between 'Review Mode' (protection on) and 'Edit Mode' (protection off) while the document is in co-authoring given certain conditions (see further details in the following sections).

Below is a table that describes the different behavior with protection on (enabled) vs off (disabled) when co-authoring a document.

Action/Function	Doc. Protection ON	Doc. Protection OFF
User can edit in Word Online	No	Yes
User must edit in track changes and comments only	Yes	No
User can accept or reject track changes	No	Yes

With protection enabled, if/when a co-author clicks the **Go to comment** link in the automated email received after being @mentioned in a document's comment (or by using another shared link to the document), the user will not be able to edit the document in *Word Online*. Instead, the user will get the pop-up message below, which provides an option to **Open in Desktop App** (the supported interface for co-authoring).
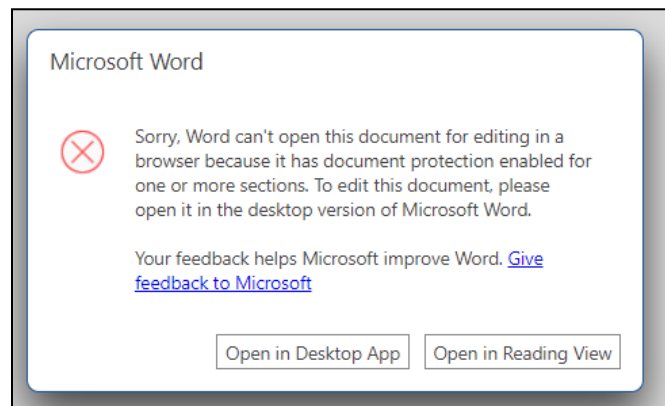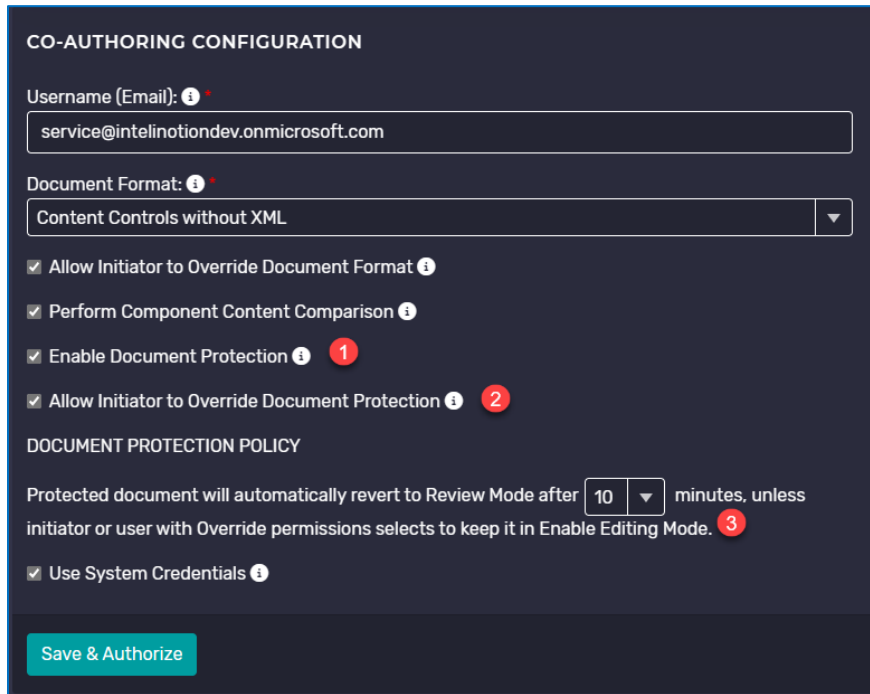
After the user clicks the **Open in Desktop App** button, or if the document was opened directly from the *InteliNotion* menu option, protection will be on, and the document will open in Review Mode.

3.1 DOCUMENT PROTECTION CONFIGURATION

Document protection is enabled at 2 levels – both for the platform itself, as well as for an individual document. To make document protection available for the platform, it must be enabled in the Co-authoring Configuration settings by following the steps below.

1. In the *InteliNotion Web Console*, go to **Settings** and select **Co-authoring**.

2. Check the **Enable Document Protection** checkbox (#1 in the screenshot above).

> **Note:** This setting will be unchecked (disabled) by default for all documents regardless of their underlying business object class. Turning this setting ON has no effect on existing documents in co-authoring.

3. If appropriate, check the **Allow Initiator to Override Document Protection** checkbox (#2 in the screenshot above).

    a. If this setting is active, a user can optionally override protection when initiating co-authoring for a particular document, which means the document will <u>not</u> be protected when it is edited in co-authoring.

b. If this setting is not active, a user cannot override protection when initiating co-authoring for a particular document.

4. If needed, change the **Document Protection Policy** (#3 in the screenshot above) when protection will become automatically re-enabled in Review Mode after the co-authoring initiator or other authorized user had temporarily disabled protection in Edit Mode.

> **Note:** The default time is 10 minutes and can be increased in 10-minute intervals to a maximum of 60 minutes.
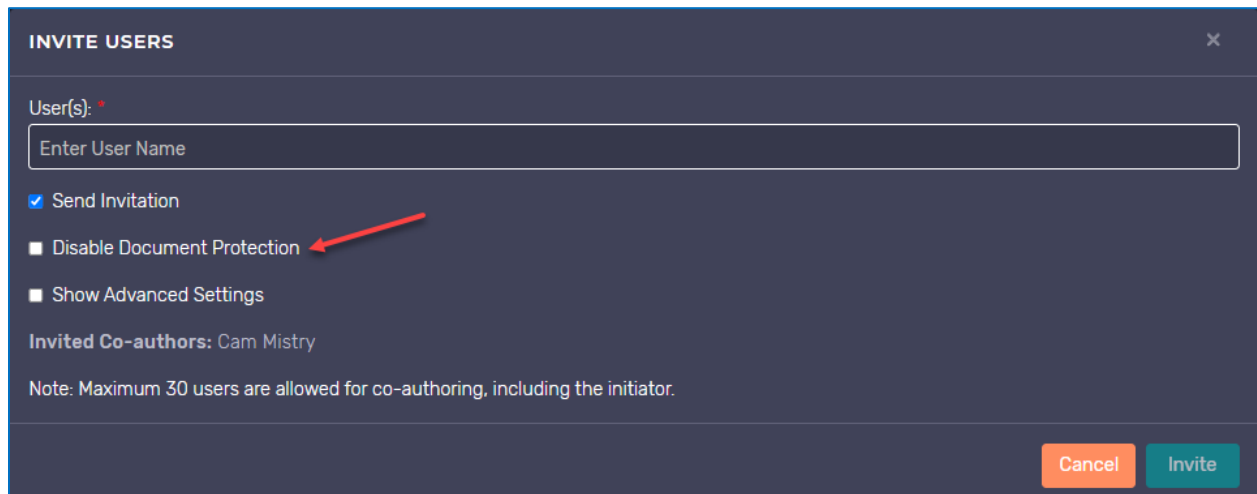
3.2 INITIATING CO-AUTHORING WITH DOCUMENT PROTECTION

If document protection is enabled at the platform level, then <u>all</u> documents will be protected by default when being initiated for co-authoring.

> **Note:** Unless protection can be optionally overridden for a specific document (see below), there is no visual indicator that protection is enabled for all documents. End-users should be notified of the platform-level protection setting for their awareness.

If the **Allow Initiator to Override Document Protection** checkbox was checked in the co-authoring configuration (see Section 3.1), the user will see a **Disable Document Protection** checkbox in both:

- The Invite Users window when initiating co-authoring.

- The Task window when initiating a new task with tandem co-authoring (if configured).

The **Disable Document Protection** checkbox will be unchecked by default. If the user checks the box and then verifies this selection in the confirmation pop-up window, protection will be overridden for the document. This means that the document will <u>not</u> be protected when it is edited in co-authoring.

> **Note:** If protection is overridden/disabled for a document, the related audit event will indicate this selection by the user.

3.3   CO-AUTHORING A DOCUMENT WITH PROTECTION ENABLED

When the document is opened in co-authoring with protection on, it will be in Review Mode by default. The co-authoring initiator as well as other authorized users will see a **Protection** section in the *InteliNotion* ribbon, with the **Review Mode** button grayed out because that mode is currently enabled (#1 in the screenshot below).

When the document is in **Review Mode**, Track Changes will be enabled by default. This is why <u>all</u> users may see a related pop-up message briefly displayed by *MS Word* (#2 in the screenshot above) to inform them of this setting.

> **Note:** Do not use *MS Word*'s **Document access mode** drop down (#3 in the screenshot above) to try and disable/enable protection.
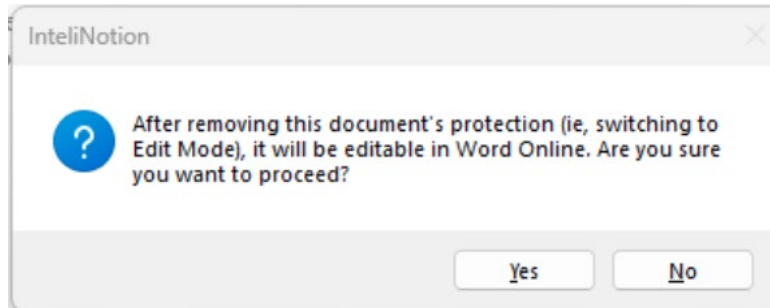
Document protection will be temporarily disabled if the co-authoring initiator or authorized user clicks the **Enable Editing** button in the *InteliNotion* ribbon as described below.

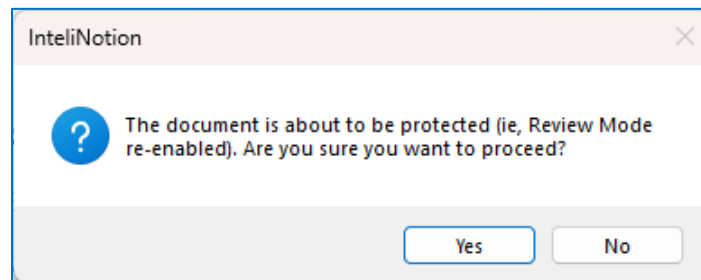1. Click **Yes** on the pop-up message to proceed.

2. The Enable Editing button is now grayed out because that mode is enabled.
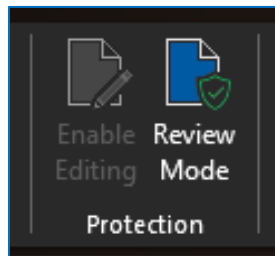
Document protection can be reenabled as follows:

1. The co-authoring initiator or authorized user clicks the **Review Mode** button in the InteliNotion ribbon.

   - Click **Yes** on the pop-up message to proceed.

2. If protection was manually disabled by a user who clicked the Enable Editing button, once the pre-configured timeout has expired, the system will automatically attempt to re-apply protection (ie, switch to Review Mode)

- In this case, the user who disabled protection will see the following pop-up message if the document is open. If it is desired to keep the document unprotected (ie, in Edit Mode), click **Yes**.
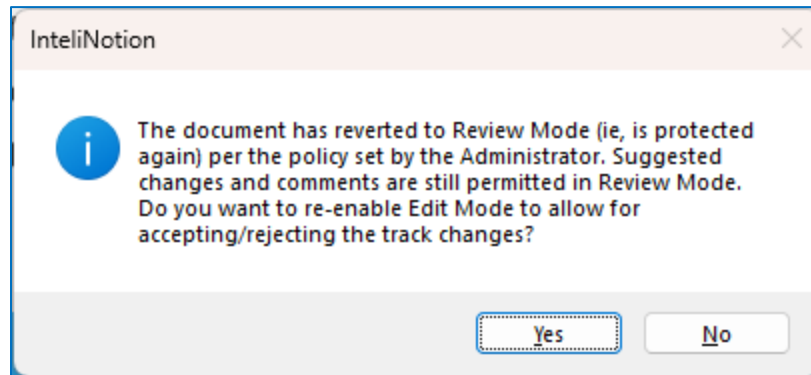
3. Each time the document is closed or re-opened by the co-authoring initiator or any authorized user with C-R-U-D-O permission, the system will attempt to re-apply protection.

3.4 KNOWN BEHAVIORS OR LIMITATIONS

See below for a list of known behaviors or limitations for this functionality.

- Only the co-authoring initiator and other authorized users will see the Protection section with related buttons in the *InteliNotion* ribbon. 'Regular' co-authors will not see the Protection section in the ribbon.

- If the co-authoring initiator or other authorized user manually disables or enables document protection (eg, by clicking the **Enable Editing** button), other users who also see the Protection section in the InteliNotion ribbon will not see a corresponding change to which button is disabled (grayed out).

  o After closing and reopening the document, the appropriate button will show as disabled (to indicate the mode), as appropriate.

- If protection is overridden/disabled for a document when it is initiated for co-authoring, it cannot be enabled for the document until it is initiated for co-authoring a subsequent time (eg, after the 1st round of co-authoring is finished).