inFusion eReview 5.13

User Documentation

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inFusion® eReview 5.13

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Chapter 1 Introduction

1.1   Overview

inFusion eReview enables users to:

- Use annotations to allow reviewers to communicate and mark-up PDF documents in the review.
- Filter and sort the annotations for easier viewing.
- Customize a review process for their specific needs.

This manual provides information about the software features and annotation capabilities of inFusion eReview.

1.2   System Requirements

inFusion eReview requires:

- Windows XP, Vista, 7, 8 or 10
- One of the following Acrobat viewers:
  - Acrobat Reader X or greater
  - Acrobat Standard/Pro X or greater
- One of the following web browsers configured to display PDFs using Acrobat/Reader within the browser:
  - Internet Explorer 9 and above
  - Firefox 3 and above

For specific hardware requirements, check the Adobe Acrobat requirements.

Chapter 2 Installation

2.1   Windows Client Installation

To install the Adobe plug-in for Windows on a client machine, follow these steps:

1. Close all open applications - especially any Adobe viewers and web browsers.
2. Run eReview.exe.
3. Follow the install instructions on your screen.

Certain Acrobat/Reader preferences may need to be configured in order for inFusion eReview to successfully communicate with the server.

- For Internet Explorer users, on the Security (Enhanced) tab of the Preferences screen:
    - Uncheck "Enable Protected Mode at Startup"
    - Uncheck "Enable Enhanced Security"
    - Check "Automatically trust sites from my Win OS security zones"
    - Click "Add Host" and add your eReview server to this area
    - Restart Acrobat/Reader
- If you continue to have issues:
    - Go to the Security tab of the Internet Options for IE
    - Click on the Trusted Sites zone and then the Sites button
    - Add the eReview server to the list of trusted sites

Chapter 3 Setting Up DB Administration

3.1 Overview

Before users can participate in reviews, the database administrator must configure inFusion eReview to reflect your organization's needs. inFusion eReview administration settings can be accessed by selecting "Administration" from the combo box. The "Administration" option is only available to users with the *TemplateCreator* role.
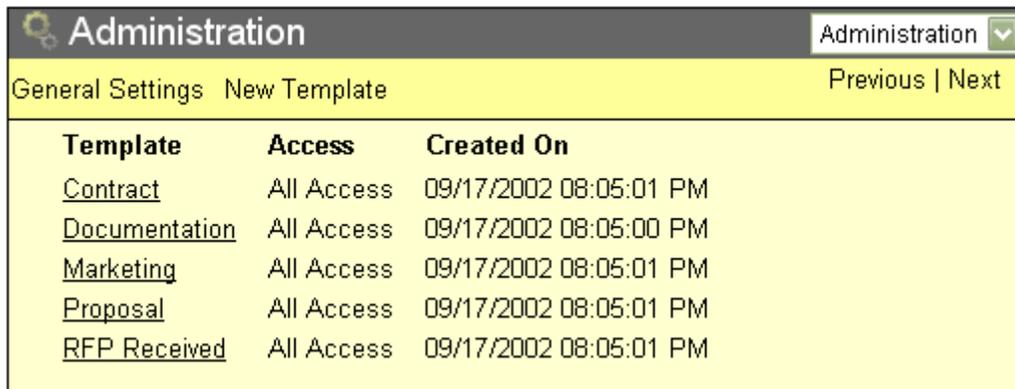
3.2 General Settings

The "General Settings" button in the Administration view allows for configuration of the following areas:

Logging

The available logging levels are as follows:

- None
- Low
- Medium
- High

The logging levels can be set for:

- Launching PDF
- Creating Annotations
- Submitting a review
- Synopsis
- Email Notifications
- Miscellaneous

Web Colors

The Web Colors area allows for customization of the eReview database interface. Colors can be specified individually for the title bar, menu bar, menu flyover and body. The available color choices include any of the valid HTML color names.

Miscellaneous

Default View: Specify the database view that the user will see by default when eReview is opened.

Warn if no template is applied: When a new review is saved, warn the creator if a review template has not been applied.

3.3   Creating a Review Template

Originators of a review have the option to base their review settings on a review template. When an originator chooses to apply a review template, the settings in the review will reflect the settings of the review template. To create a review template, click on "New Template" in the Administration view. The template page is broken up into three steps, Setup & Security, Annotation Categories and Notification, and Annotation Properties. You can create a default template which will set the defaults for all fields when an originator first opens the "New Review" form. All the default values can be overridden. To create a default template make the title of the template "*".

Step 1: Setup & Security

Review Template

1. Title – The title of the template. Template names should be unique.
2. Copy values from the following template – A template can be based off of another template. Select a template from the list and click "Copy". The fields in the current template will be filled in with the values from the selected template.

Template Security

1. Restrict access to use this template – If "Yes" is selected, only the creator of the template, users with the *DB Manager* role, and the users listed in the field below will be able to select this template when creating a review.

Review Settings

1. Review Process Format – How the review moves between the reviewers
   - Serial: Moves one reviewer at a time. The review will start with the first person in the list and move down the list, one by one, as each reviewer completes their review.
   - Parallel: All reviewers may participate in the review simultaneously.
2. Time Limit Options – How the review behaves when a reviewer does not complete their review in the given amount of time
   - Send Reminders: Sends a reminder to each reviewer that has not completed their review in the given amount of time.
   - Move to Next Reviewer (Serial Only): If the previous reviewer does not complete the review in the given amount of time, the review will move to the next reviewer.
3. Number of days reviewer has to review the document – If there is a time limit set for the review, specify the number of days a reviewer has to review the document. For a serial review this will be the number of days each reviewer will have to complete the review. For a parallel review this will be the number of days all the reviewers have to complete the review.
4. Notify Originator After – Determines when the originator is notified after reviewers complete the review.
   - After each reviewer has completed their review: Will send the originator an email after each reviewer completes their review.
   - After all reviewers have completed their review: Will send the originator an email after the final reviewer completes their review.

Reviewer Selection

1. Choose reviewers by – How the originator chooses the reviewers
   - An Address Dialog: The originator chooses the reviewers based on the address book.
   - The following list: The originator chooses the reviewers based on the people listed in the field below.
2. Automatically import reviewers from template list – Select this to have the reviewers in the template list automatically used as the initial reviewers when selecting a template for a given review.

Step 2: Annotation Categories & Notifications

Annotation Categories

Each time a user creates an annotation on the PDF, three combo boxes will be available. The choices to each of these options are set when the review is created. To make it easier for the originator of a review, predefined choices can be set for the three combo boxes and for the stamp combo box. Each of the combo boxes can be given a label of your choice. The default labels are Category, Action, Status, and Stamp Text.

1. Property Labels – Each category, action, stamp text, and status choice property can have a different label in the annotation properties dialog and filter dialog.
2. Property Options- In the fields below the labels, add the choices you would like reviewers to be able to choose from for that combo box.

Notifications

1. Notify annotation creator when someone responds to the annotation – When checked, this will email the creator of an annotation each time someone responds to that annotation.
2. The notification settings enable specific people to be automatically notified when annotations have been created with a specific annotation category. To enable notifications for an individual, enter the user name, combo box label, and the value for that combo box. Click on "Set Notification". The selection will appear in the

"Defined Notification" list to. When an annotation is created that matches the notification criteria, an e-mail is sent to the associated individual(s).

3. Notifications can be removed by selecting a notification from the "Defined Notification" list and clicking the "removed selected" button.

Step 3: Annotation Properties

Annotations Colors and Dialogs

1. Allow Annotation in Review – When the Allow Annotation setting is set to No, users will not be able to create annotations of that type in a review based on this template.

2. Allow User to Edit Annotation Colors – When selected each reviewer will be able to change the annotation to any color once the annotation is created on the PDF document.

3. Launch Annotation Properties Dialog - When an annotation is created, a properties dialog can automatically open allowing the reviewer to specify a category, action, status, and enter text about the annotation. For each annotation type, choose "Yes" to automatically launch the dialog every time an annotation is created. The dialog can always be launched by double-clicking on annotation after it is created.

4. Default Color – The default color when an annotation is first created.

5. Line Thickness – The line thickness when an annotation is first created. One (1) being the thinnest line and 5 the thickest.

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Default Colors for Reviewers

Annotation colors can be set for an individual reviewer or group of reviewers. If a color is associated with a person, then annotations created by that user(s) will use the pre-defined color. This setting will override any default color setting.

Chapter 4 The Review Process

4.1   Overview

The process:

1. The originator of the review begins a new review cycle by clicking on the "New Review" button under the "Review Options" in the view. This launches a form that the originator completes to create the review.

2. The originator specifies the location of the PDF document to be reviewed and then selects options to customize the review. These options include review type, members of the review, time limits, and notification settings.

3. Once the review options are specified, the originator launches the review and an automated e-mail notification with a link to the document is sent to the designated reviewers.

4. The reviewers can then annotate and collaborate on the document using inFusion eReview tools.

5. As each reviewer completes his review, he/she clicks on the "My Review is Complete" button to signify that he is finished.

6. After all reviewers have clicked on the "My Review is Complete" button, the originator is notified that the review cycle is done.

4.2   Navigation within the Database

The inFusion eReview web environment consists of two panes: a view displaying the reviews on the left and a help pane just to the right. Each view contains buttons to start a review, edit a review, and view a synopsis.

To see the reviews already created, click on *All Reviews*, *My Reviews*, or *My To Do*. Each of these pages shows the title of the review, along with any annotations that have been made on this document. To view all of the annotations that were made during the review, click the blue arrows beside the review document. The annotations can also be viewed and hidden by clicking the "Expand" and "Collapse" buttons on the top of the page.

To view a more detailed summary of the annotations in a review, select the document, and then click on the "Synopsis\for web viewing" button. Reviews can be deleted and sent to the Recycled folder by selecting a document, then clicking the "Modify\Delete" button. Use the "Next" and "Previous" buttons to navigate through the pages of reviews.

Views

1. All Reviews - Lists all of the reviews within the inFusion eReview application. Information provided includes the title, originator, creation date, and end date of each review. In the browser, clicking on the "Summary" link below the review title will open a summary of the review.

2. My Reviews – Lists all the reviews in which the user is the originator. Information provided includes the title, originator, creation date, and end date of each review. In the browser, clicking on the "Summary" link below the review title will open a summary of the review.

3. My To Do – Lists all the reviews in which the user is a reviewer of that review. Information provided includes the title, originator, creation date, and end date of each review. In the browser, clicking on the "Summary" link below the review title will open a summary of the review.

Menu Bar

1. Review Options
   a. New Review – Opens the form to begin the review process and allows the originator to set the review options.

2. Edit Options
   a. Modify – Opens the selected review to be modified. Only originators can open a review to be modified. Reviews that are completed by all reviewers cannot be modified.
   b. Delete - Deletes all selected reviews. Only originators can open a review to be modified.

3. Synopsis
   a. For web viewing – Displays a summary of all the annotations for the selected review in HTML format.
   b. For anonymous print – Opens the review in a PDF for read only and excludes the usernames and dates from each comment and response. This can be used to print an anonymous summary of the review.

4.3   Starting a Review

To start a review, click on the "Review Options\New Review" button. This will bring up a form for you to fill out your reviews requirements. Starting a review is a three step process, *General Setup, Annotation Options,* and *Notifications & Dialogs*.

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Step 1: General Process Setup

Select A Template

As the originator you have the options to base the review fields on an already created template. Choose a template from the drop down list and click the apply button. All the fields will be filled in with the values from that template. Options based on a template can be modified if necessary.

The Document

1. Title - The name of the review. This is a required field for starting a review.
2. How the review accesses the PDF.
   - You have the option to attach the PDF to the review document or link to the PDF by URL.
3. Email text - You can type an email message to the reviewers. This text is sent in an e-mail that notifies the recipients that they are selected to participate in a review.

General Review Settings

1. Review Process Format – How the review moves between the reviewers

   - Serial: Advance one reviewer at a time. After the review is submitted, the first person receives notification. After each reviewer has finished reviewing the document, they then click on the "My Review is Complete" button. Upon their completion, notification is sent to the next person, and so on until the end of the review. This type of review works well as a "chain of command" system in which you want one person's comments and opinions added to another's in an ordered discussion. The order of reviewers is determined by the order of the selected names in the "Select Reviewers" field.

   - Parallel – All reviewers receive the document at the same time. After submitting a review, notifications are sent to all selected reviewers. This type of review works well as a "general opinion" system in which you want many people's opinions and an ordered discussion or hierarchy is not necessary. The order of reviewers or groups does not matter in a parallel review.

2. Time Limit Options – How the review behaves when a reviewer does not complete their review in the given amount of time

   - No Time Limit: The review has no expiration date.

   - Send Reminders: Sends an email reminder to the reviewer that has not completed their review in the given amount of time.

   - Move to Next Reviewer (Serial Only): The review will move to the next reviewer if the previous reviewer does not complete the review in the given amount of time.

3. Expiration Date for Review – How long a reviewer has to review the document.

   - Serial: The number of days each reviewer will have to complete the review.

   - Parallel: A specific date all reviewers have to complete the review.

4. Review Moderators – Moderators share all the capabilities of the originator of a review such as deleting and modifying the review as well as receiving notifications.

5. Notify After – How the moderators are notified when the review or reviewer is completed.

   - Each Reviewer: Will send the originator an email after each reviewer completes the review.

   - Final Reviewer: Will send the originator an email after the final reviewer completes their review

The Reviewers

1. Select reviewers - The reviewer(s) that will participate in the review. Click on the lookup icon next to the Reviewers box to launch a user selection dialog. If a serial review is selected, then the order of the reviewers in the "Select Reviewers" field determines the order of the review. Groups may be added in this field. If using a serial review, all users in the group will be able to review at the same time, and when they are all complete it will move on to the next reviewer.

   When modifying a serial review that is in-progress, a Review Manager has the ability to change the order of the future reviewers using the Move Up and Move Down buttons. In addition, the current reviewer in a serial review can be skipped by using the Skip This Reviewer button, causing the current reviewer's review to be marked as completed, and moving the review to the next reviewer.

Step 2: Annotation Settings

1. Annotation Categories – The annotation dialog contains three combo boxes. The inFusion eReview stamp tool will contain a fourth combo box. The values in these fields are the choices the reviewers will have for the combo boxes. If a field is left blank, the reviewers will not see any list.

2. Default Colors for Reviewers - An annotation color can be associated with a reviewer or group of reviewers. If a color is associated with a person, then all the annotations on the review PDF created by that person will be that color. This setting will override any default color setting.

Step 3: Notifications & Dialogs

1. Notification settings - This option allows notifications to be sent to a person or group based upon the particular categories, actions, or stamp text of a review. First, select the person or group you want to notify. Then, choose which combo box value you want the notification based upon. Finally select the value you wish the combo box to have when the notification will be sent out. In the review, every time your selection is entered in an annotation, that person(s) will receive an email message.

2. Restrict Access to the review – If "Yes" is selected; only the originator and the reviewers in the review will be able to see the review and create annotations.

3. Once the review is complete, reviewers:
   a. Can access the review and add annotations – Once the review is complete reviewers will still be able to access the review and add or modify annotations.
   b. Can access the review – If access to the review is restricted, once all reviewers have finished the review, they will still be able to open the review but will not be able to create or modify annotations.
   c. Cannot access the review – Once all reviewers have finished the review, they will not be able to see the review.

4. List additional people who can see this document with the reviewers – If access to the review is restricted then in addition to the reviewers, any users listed in the field

will also be able to open the review. However, anyone listed in this field will not be able to create annotations.

Submit Review
Once you are finished customizing the review, click the "Submit Review" button to begin the review. This saves the review to the database and sends email notifications per the type of review (serial or parallel). As the originator, you can change settings to your review during the review process by clicking the "Edit Options\Modify" button in each view.

Chapter 5 Annotating the Review

5.1 Overview

There are ten types of annotations available – note, rectangle, highlight, strikethrough, stamp, pencil, line, edit mark, text and underline. In addition to marking up the PDF you can:

- Categorize annotations
- Declare an action for an annotation
- Mark the status of an annotation
- Comment on other reviewer's annotations
- Filter and sort annotations by type, reviewer, date, page number, category, action, status choice, and text string.

5.2 Annotation Types

Note

1. Click on the "Note" button on the toolbar to select the Note tool.
2. Click and release the mouse button at the location you wish to place the note.
3. If the originator selected the "Launch Properties Dialog on Create" option during the creation of the review, the "New Annotation" dialog will appear.
   a. Type your comment in the edit box.
   b. Select an appropriate category, action, and status choice for your comment. Other reviewers will be able to sort and filter the annotations based on these categories and actions.
   c. Select a desired color for your annotation.
      Note: You may not be able to select a color choice if the originator of the review has disabled this feature.
   d. Optional: Mark your annotation "private". Annotations marked as private are not visible to other reviewers.
   e. Select "OK" to save and close your annotation, or select "Cancel" if you do not wish to save your Annotation.
4. If the "Launch Properties Dialog on Create" was not selected, the annotation will be placed on the PDF and saved.

Rectangle

1. Click the "Rectangle" button on the action bar to select the Rectangle drawing tool.
2. Click on the document to create an anchor point for the rectangle. With the mouse button still depressed, drag the cursor to create the desired rectangle, and then release the button.
3. If the originator selected the "Launch Properties Dialog on Create" option during the creation of the review, the "New Annotation" dialog will appear.

a. Type your comment in the edit box.
b. Select an appropriate category, action, and status choice for your comment. Other reviewers will be able to sort and filter the annotations based on these categories and actions.
c. Select a desired color and line thickness for your annotation.
   Note: You may not be able to select a color choice if the originator of the review has disabled this feature.
d. Optional: mark your annotation "private". Annotations marked as private are not visible to other reviewers.
e. Select "OK" to save and close your annotation, or select "Cancel" if you do not wish to save your Annotation.

4. If the "Launch Properties Dialog on Create" was not selected, the annotation will be placed on the PDF and saved.

Highlight

1. Click the "Highlight" button on the action bar to select the Highlight tool.
2. Select the word or words you wish to highlight.
3. If the originator selected the "Launch Properties Dialog on Create" option during the creation of the review, the "New Annotation" dialog will appear.
   a. Type your comment in the edit box.
   b. Select an appropriate category, action, and status choice for you comment. Other reviewers will be able to sort and filter the annotations based on these categories and actions.
   c. Select a desired color for your annotation.
      Note: You may not be able to select a color choice if the originator of the review has disabled this feature.
   d. Optional: mark your annotation "private". Annotations marked as private are not visible to other reviewers.
   e. Select "OK" to save and close your annotation, or select "Cancel" if you do not wish to save your Annotation.
4. If the "Launch Properties Dialog on Create" was not selected, the annotation will be placed on the PDF and saved.

Strikethrough

5. Click the "Strikethrough" button on the action bar to select the Strikethrough tool.
6. Select the word or words you wish to strikethrough.
7. If the originator selected the "Launch Properties Dialog on Create" option during the creation of the review, the "New Annotation" dialog will appear.
   a. Type your comment in the edit box.
   b. Select an appropriate category, action, and status choice for you comment. Other reviewers will be able to sort and filter the annotations based on these categories and actions.
   c. Select a desired color and line thickness for your annotation.
      Note: You may not be able to select a color choice if the originator of the review has disabled this feature.
   d. Optional: mark your annotation "private". Annotations marked as private are not visible to other reviewers.
   e. Select "OK" to save and close your annotation, or select "Cancel" if you do not wish to save your Annotation.
8. If the "Launch Properties Dialog on Create" was not selected, the annotation will be placed on the PDF and saved.

Stamp

1. Click the "Stamp" button on the action bar to select the Stamp tool.
2. Click and release the mouse button on the document where you would like to place the stamp.
3. If the originator selected the "Launch Properties Dialog on Create" option during the creation of the review, the "New Annotation" dialog will appear.
   a. Type your comment in the edit box.
   b. Select an appropriate category, action, and status choice for you comment. Other reviewers will be able to sort and filter the annotations based on these categories and actions.
   c. Select a desired color and line thickness for your annotation. Note: You may not be able to select a color choice if the originator of the review has disabled this feature.
   d. Optional: mark your annotation "private". Annotations marked as private are not visible to other reviewers.
   e. Select "OK" to save and close your annotation, or select "Cancel" if you do not wish to save your Annotation.
4. If the "Launch Properties Dialog on Create" was not selected, a small dialog pops up containing stamp choices.
   a. Choose the stamp text and press the enter key
   b. The stamp will be placed on the PDF and saved

Line

1. Click the "Line" button on the action bar to select the Line tool.
2. Click to create an anchor at this first point. With the mouse button still depressed, move the cursor to the point at which the line should end. Note: You may optionally hold down the shift key while creating an annotation to snap it to a 45 ° angle from the coordinates of the first point.
3. If the originator selected the "Launch Properties Dialog on Create" option during the creation of the review, the "New Annotation" dialog will appear.
   a. Type your comment in the edit box.
   b. Select an appropriate category, action, and status choice for you comment. Other reviewers will be able to sort and filter the annotations based on these categories and actions.
   c. Select a desired color and line thickness for your annotation. Note: You may not be able to select a color choice if the originator of the review has disabled this feature.
   d. Optional: mark your annotation "private". Annotations marked as private are not visible to other reviewers.
   e. Select "OK" to save and close your annotation, or select "Cancel" if you do not wish to save your Annotation.
4. If the "Launch Properties Dialog on Create" was not selected, the annotation will be placed on the PDF and saved.

Pencil

1. Click the "Pencil" button on the action bar to select the Pencil tool.
2. Hold down the mouse button while dragging the mouse pointer. When finished drawing, release the mouse button.
3. If the originator selected the "Launch Properties Dialog on Create" option during the creation of the review, the "New Annotation" dialog will appear.
   a. Type your comment in the edit box.

b. Select an appropriate category, action, and status choice for you comment. Other reviewers will be able to sort and filter the annotations based on these categories and actions.

c. Select a desired color and line thickness for your annotation.
Note: You may not be able to select a color choice if the originator of the review has disabled this feature.

d. Optional: mark your annotation "private". Annotations marked as private are not visible to other reviewers.

e. Select "OK" to save and close your annotation, or select "Cancel" if you do not wish to save your Annotation.

4. If the "Launch Properties Dialog on Create" was not selected, the annotation will be placed on the PDF and saved.

Free Text $\mathbb{T}$

1. Click on the "Free Text" button on the action bar to select the Free Text tool.

2. Click the mouse button on the document where you would like to place the text. The text will be top and left aligned to where you click.

3. If the originator selected the "Launch Properties Dialog on Create" option during the creation of the review, the "New Annotation" dialog will appear.

a. Type your comment in the edit box.

b. Select an appropriate category, action, and status choice for you comment. Other reviewers will be able to sort and filter the annotations based on these categories and actions.

c. Select a desired color for your annotation.
Note: You may not be able to select a color choice if the originator of the review has disabled this feature.

d. Optional: mark your annotation "private". Annotations marked as private are not visible to other reviewers.

e. Enter the free text

f. Select "OK" to save and close your annotation, or select "Cancel" if you do not wish to save your Annotation.

4. If the "Launch Properties Dialog on Create" was not selected, the annotation will be placed on the PDF and saved, a small dialog pops up displaying an area for the user to enter text.

a. Enter the text and press the enter key.

b. The text will be placed on the PDF and saved.

Edit Marks ¶

1. Click on the "Edit Mark" button on the action bar to select the Edit Mark tool. The cursor will display with the currently active edit mark.

2. To select an edit mark do one of the following:

a. Once the Edit Mark tool is activated, click on the Edit Mark tool button again to display a dialog of the edit marks. Click on the edit mark to select it. (If the Launch Edit Mark Dialog review options is set to No, this option will be turned off on a Windows machine)

b. (Windows Only) Use the Tab key to cycle forwards through the edit marks and use the Shift-Tab key to go in the reverse direction.

c. Shortcut keys can also be used to select the edit mark (see Appendix A). In order to use the shortcut keys on a Mac, the edit mark palette must be open.

3. Click the mouse button on the document where you would like to place the edit mark.

4. If the originator selected the "Launch Properties Dialog on Create" during the creation of the review, the "New Annotation" dialog will appear.

a. Type your comment in the edit box.

b. Select an appropriate category, action, and status choice for you comment. Other reviewers will be able to sort and filter the annotations based on these categories and actions.
c. Select a desired color for your annotation.
Note: You may not be able to select a color choice if the originator of the review has disabled this feature.
d. Optional: mark your annotation "private". Annotations marked as private are not visible to other reviewers.
e. Select "OK" to save and close your annotation, or select "Cancel" if you do not wish to save your Annotation.

5. If the "Launch Properties Dialog on Create" was not selected, the annotation will be placed on the PDF and saved.

Underline

1. Click the "Underline" button on the action bar to select the Underline tool.
2. Select the word or words you wish to underline.
3. If the originator selected the "Launch Properties Dialog on Create" option during the creation of the review, the "New Annotation" dialog will appear.
   a. Type your comment in the edit box.
   b. Select an appropriate category, action, and status choice for you comment. Other reviewers will be able to sort and filter the annotations based on these categories and actions.
   c. Select a desired color and line thickness for your annotation.
   Note: You may not be able to select a color choice if the originator of the review has disabled this feature.
   d. Optional: mark your annotation "private". Annotations marked as private are not visible to other reviewers.
   e. Select "OK" to save and close your annotation, or select "Cancel" if you do not wish to save your Annotation.
4. If the "Launch Properties Dialog on Create" was not selected, the annotation will be placed on the PDF and saved.

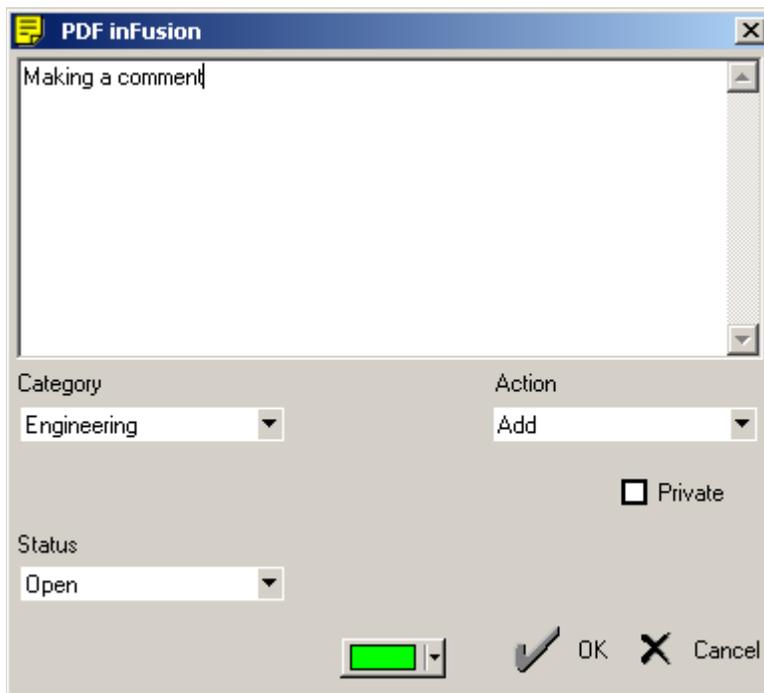## 5.3 Annotation Properties Dialog

The Annotation Properties dialog appears when you add an annotation to the PDF document. The dialog box records all changes to the annotation in the format of a threaded discussion.

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1. Categories (Combo Box 1) - Designed to classify the annotation as a particular type. For example, if the comment on the annotation involves a legal issue, it could be categorized as "legal." This allows annotations to be organized, making document review easier and more efficient.

2. Actions (Combo Box 2) - designed to give each annotation a desired result. For example, after using the Strikethrough Tool, the resulting action could be "delete" to let the reviewer know that a section of text must be removed. This allows annotations to be specific and initiate productive actions based on the review process.

3. Status (Combo Box 3) - Designed to give each annotation a particular designation. Possible examples are "open/closed" or "active/inactive/standby." This allows the annotation to communicate whether or not its action, issue, or desired outcome has been achieved.

4. Stamp Text (Combo Box 4) – This is unique to the Stamp Tool and is designed to label a review document with a particular status or designation. Possible examples are "approved/rejected" or "draft/final copy." The stamp text appears on the document as part of the annotation icon. This allows the annotation to send a quick status message to anyone viewing the document.

5. Edit Text - Unique to the Highlighter and Strikethrough Tools and is designed to allow the reviewer the option of editing the text that has been selected by previewing it in a window which displays the selected text in the above window and the editable text below it. This option allows the reviewer to edit the selected text or comment on it within its original context.

6. Private - An annotation can be marked private by selecting private on the annotation dialog. When an annotation is marked private, only the author of the annotation can see the annotation. To make a private annotation public:
   a. Open the annotation you wish to make public.
   b. Uncheck the private checkbox.
   c. Save the annotation.
      NOTE: Once an annotation has been saved as Public, it can not be set back to Private.

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7. Commenting on existing annotations- This allows a reviewer to converse with the other reviewers regarding the content of the annotation. inFusion eReview manages the comments as a discussion thread, allowing for a linear discussion. inFusion eReview maintains an audit trail of all changes made to the annotation.
   a. Open an existing annotation by double clicking it.
   b. In the edit box of the Properties dialog, enter a comment or change an annotation setting.
   c. Click OK.
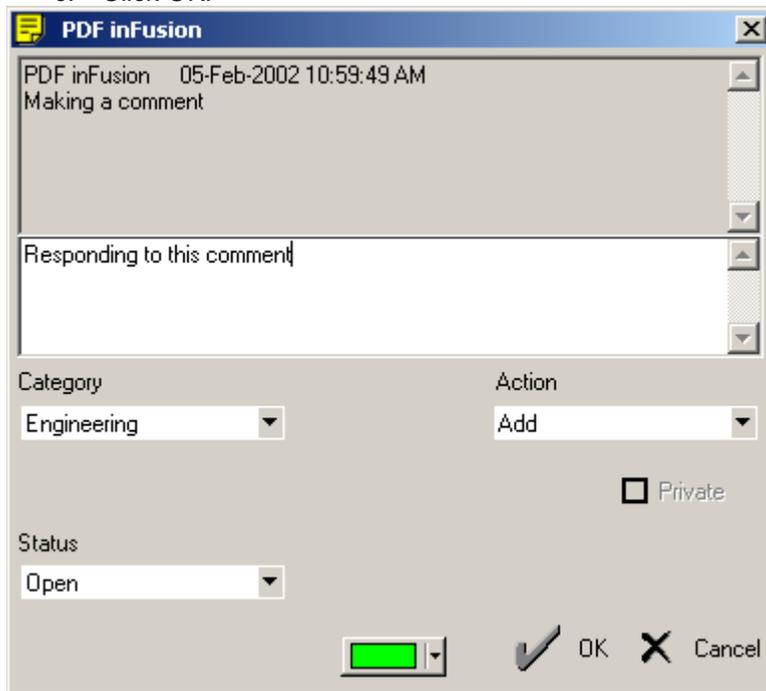
8. Selecting Overlapping Annotations - If there are overlapping annotations on a document, you can select and view the bottom annotations in one of three ways.
   - Select the annotation by opening the filter dialog and selecting it in the annotation list.
   - Select the annotation by opening the filter dialog and filtering out any annotations that are on top of the annotation you want. The annotation may then be selected on the document.
   - Select the annotation by holding the shift key while clicking on the overlapping annotations. This will bring the bottom most annotation to the top. A group of overlapping annotations may be cycled-through in this manner.

5.4 Printing Annotations

inFusion eReview includes the capability to print the annotations and a summary of the annotations to a printer or PDF.

1. Click on the Print button on the Acrobat toolbar.
2. Choose a printer that supports PostScript Language level 2 or higher.
3. A dialog will open controlling InFusion eReview annotation printing.

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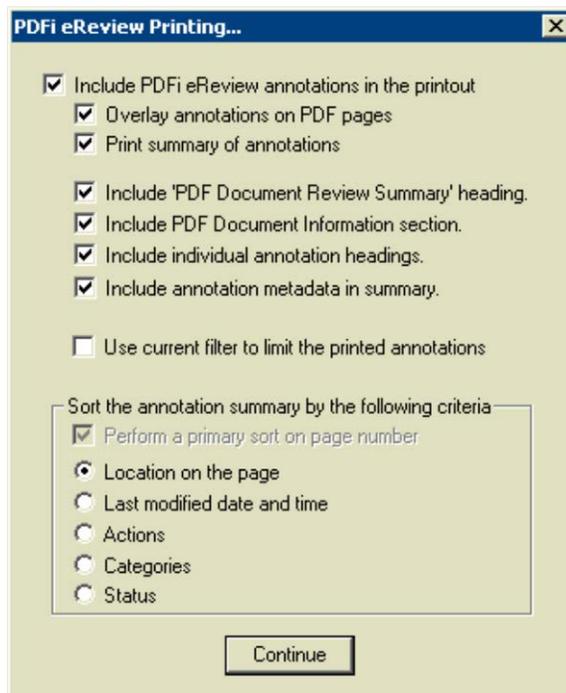
a. Include PDFi eReview annotations in the printout – In order to include inFusion eReview annotations this option needs to be selected.

b. Overlay annotations on the PDF pages – the inFusion eReview annotations will be seen within the PDF document in the printout.

c. Print summary of annotations – A summary page of the annotations and text and properties within the annotations will be printed before the actual PDF.

d. Include 'PDF Document Review Summary' heading. – The title line will be included at the top of the summary pages.

e. Include PDF Document Information Section. – Information such as the document title, summary date, current user and path to the review should be included in the summary.

f. Include individual annotation headings. – Include the page, creator and creation date line at the top of each annotations entry.

g. Include annotation metadata in summary. – Include the metadata associated with an annotation in the printout (actions, categories and status).

h. Use current filter to limit the printed annotations – If an inFusion eReview filter is applied when printing the PDF, only those annotations which are visible will be printed.

i. Sort the annotation summary by the following criteria – When printing a summary of the annotations, the annotations can be sorted by Location on the page, Last modified date and time, or by a drop down list value.

4. Click continue

Chapter 6 Filtering and Sorting Annotations

6.1 Overview

The inFusion eReview "Filter and Sort" functions help reviewers find the information they need, when they need it. Annotations can be filtered by annotation type, reviewer, actions, categories, status choice, date and/or specific text string. In addition, annotations can be sorted by type, page, originator, date, actions, categories or status choice. By clicking the "Filter" button on the tool bar a reviewer can view and access the filter and sort options.

6.2 Filter Annotations

Each of the following filter options can be applied individually or combined with one another to allow for very specific annotation organization. When you have selected the filter you wish to see, click on "Apply Filter" to activate the filter.

1. By annotation type - Deselecting an annotation type will hide those annotations from the Filter window and on the document.
2. By reviewer - Highlight the names of reviewers whose annotations you wish to see.
3. By actions - Highlight the actions of the annotations you wish to see.
4. By categories – Highlight the categories of the annotations you wish to see.
5. By status - Highlight the status choices of the annotations you wish to see.
6. By date - There are two options for date filtering. You can choose to see only those annotations created on a specific date or between certain dates, or you can choose to see only those annotations modified on a specific date or between certain dates.
7. By text search - You can also choose to search by "Any Keyword", "All Keywords", or "Exact Phrase". Optionally, you may further limit this by making the filter "Case Sensitive" and only work on the "Whole Word" matches.

6.3   Sort Annotations

In the filter dialog, the list of annotations can be sorted by clicking on the column header you wish to sort by. This allows for sorting by type, page, author, date, action, category, and status. Clicking on the column heading again will perform a reverse sort on the column.

6.4   Managing Annotations

1. Delete selected - An annotation can be deleted by selecting an annotation in the sort window, and clicking on the "Delete Selected" button. An annotation may only be deleted by its author, and only if no additional comments have been added to it.
2. Reload annotations - By clicking the "Reload Annotations" button, you can see new annotations that have been added by other reviewers while you were reviewing the PDF.

Chapter 7 Troubleshooting

7.1   FAQ

1. Cannot display a PDF in the browser.

    Please refer to the link:

    https://helpx.adobe.com/acrobat/using/display-pdf-in-browser.html

2. The PDF loads in the browser but you cannot see inFusion eReview tools in the toolbar.

    Verify that the inFusion eReview plug-in is loading.

    - Bring Acrobat/Reader to the front. Click on the Help Menu. Under About Plug-ins you should see inFusion eReview.
    - Make sure the certified plug-ins only checkbox is deselected in Acrobat. Verify this under the General tab of the Preferences dialog.
    - Make sure the CreateXML agent is present in the database. If it is, then the code may have been erased or corrupted. It must be replaced with the agent from the template.

3. Get "The page cannot be displayed" when trying to open a document or form on the web.

    This error occurs when the signer of the agents in the database does not have unrestricted access to run agents on the server. Please see your system administrator for assistance.

4. When trying to open an inFusion eReview document you repeatedly get the login and it does not open the document.

    This can be caused by the signer of the agents not having at least editor access in the database ACL. Please see your system administrator for assistance.

5. Get a "Communications error occurred while saving the annotation", then "Error creating the annotation", while saving an annotation.

    This can be caused by the CreateAnnotation agent not being present in the database or its code having been erased. The agent will need to be added or replaced from the template.

6. To assist the inFusion eReview Support team in troubleshooting a problem, it is often useful to create and send a log file. To create a log file:
    a. Open your Acrobat application.
    b. Click on Help\About Third-Party Plugins\inFusion eReview.
    c. Click on the *Log File* button. The Log window will open.
    d. If Log Path says "No Log File", a log file does not exist and will need to be created.   Click on *Create Log* button. Log Path will show the path to the log file and the information box will contain the log data.

e. Close the Log window and the About dialog. Repeat the process that was causing the problem to allow the pertinent process information to be logged.

f. Go to the file listed in <u>Log Path</u> on the Log dialog and send it to <u>inFusionSupport@itmassociates.com</u>.

7. <u>When opening a review document, you get "Agent Done" and a notes exception on the "getDocumentByUNID" is thrown to the server console.</u>

In the ACL uncheck the Read/Write Public Documents options for Anonymous and Default.

Chapter 8 inFusion eReview Support

8.1   Support

While this documentation provides the information you need to understand and use inFusion eReview, there may be times when additional information or assistance is needed.

- If you purchased inFusion eReview from an inFusion eReview Business Partner, please contact the business partner for technical support. Your administrator will have all the contact information that you need.

- Otherwise, send your questions directly to ITM Associates via email to: inFusionSupport@itmassociates.com.

ITM will provide timely responses to support questions from inFusion eReview users that have purchased an inFusion eReview Maintenance Agreement.

For the latest information on inFusion products and services, please visit www.itmassociates.com.

Appendix A

Edit Mark Shortcut Keys

Name	Icon	Key		Name	Icon	Key
Align Horizontal		h		Move Down		Shift+D
Align Vertical		v		Move Left		[
All Caps		c		Move Right		]
Apostrophe		'		Move Up		Shift+U
Boldface		b		Paragraph		Shift+P
Center		Shift+}		Paren		Shift+(
Close Space		S		Period		.
Colon		Shift+:		Roman		r
Delete		d		Semicolon		;
Emspace		m		Space		Shift+#
Enspace		n		Transpose		Shift+T
Hyphen		Shift+H		Underline		u
InitCap		Shift+I		Emdash		Shift+M
Insert		i		Endash		Shift+N
Italics		t		Comma		,
Let Stand		Return		Small caps		Shift+S
Lowercase		l		Inquiry		Shift+?