

Reviewing Your Document

Your boss wants to review your document - now what?

- Give them the document URL
- Notify them with a Directed Comment
- Send a task requesting a review of the document
- Send the document for review

Reviewing Your Document - Scenario

Your boss wants to navigate directly to her items - how can you accommodate her?

- Use directed comments to point her to exactly the spots in the document that need reviewing
- If only one section of the document needs reviewing, just give her the URL for that one section
- Run a blackline between two revisions to point out the changes that have been made to the document since the last time she did a review
 - now she can just review the changes and not the document in its entirety
 - blacklines can run for the entire document or just for certain sections
 - this blackline can be sent for review for a digital review experience
- Send her a task asking her to review only a specific section of the document
- Work in track changes mode so she can have a chance to approve/reject the changes you are making

Demo

Review Features

- URL
- Labels
- Blacklines
- Commenting
- Tasking
- Track Changes

Document Blackline - Activity

Your Turn!

1. From the History Panel choose the most current " Today - Timestamp" to create a blackline
2. Filter the History panel to only Milestones - Diamond Icon
3. Compare the revision you chose to Draft 1 we created earlier
 - a. Name the blackline "Training Changes - Blackline"
4. Open the blackline

What color is the newly added content?

Comments - Activity

Your Turn!

1. In the Performance Section
 - a. Highlight the first paragraph of text
2. Add a directed comment - direct it towards the person in class to whom you gave Viewer permissions to at the beginning of class
3. Resolve the comment
4. Add another directed comment to yourself & the instructor in the same section on the Table
5. From the Comments Panel
 - a. Choose Filters
 - b. Change the Status drop down to include Resolved

What icon shows a comment?

Comments - Activity

Your Turn!

1. Navigate to your email
2. Find the Wdesk notification that you have been mentioned in a comment, follow the hyperlink
3. Reply back to the comment thread with your direct mention
4. Apply a filter to show only resolved comments
5. Did your current comment disappear?

Note: Comments will batch notify users, so there might be a delay in received notifications. This is helpful when sending a lot of comments at once so emails are not blasted with tons of notifications.

Labels - Activity

Your Turn!

1. Click on the gray circle at the top right of the document outline
2. Enable labels
3. Pretend your boss just finished reviewing the "Overview" section; apply the "Final" label to it
4. Add a new label and call it "On Hold"
5. Apply it to the "Performance" section

Note: If you only have Viewer permissions on a document, then you can only apply labels. You wouldn't be able to create new ones.

Review Tools

Outline Labels in Documents

- Track progress on the document
- Assign out sections
- Assign priority to sections
- Visual cue for team members

Note: Labels must be enabled by the document Owner before they can be used

Tasking - Activity

Your Turn!

1. Click on the Tasks icon in the right-hand panel
2. Create a task and assign it to yourself
3. Note that the task shows up in a few different places, navigate to each:
 - a. Under Tasking section in Wdesk Home
 - b. Task tab on right-hand panel
 - i. Only shows tasks for the active document

Note: The person you assign the task to will get a notification email.

Review Tools

Tasking

- Helps you manage a project
- Assign responsibilities
- Assign deadlines
- To-do list Dashboard

Note: Make sure the person you are assigning the task to has the proper permissions to your document

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Review Features

Agenda - Review

Part I

- Organizations/Workspaces
- Navigate Home
 - Organize Folders
- Create a Document
- Format Document
 - Properties & Permissions
 - Populate and Format Text & Tables
 - Insert Hyperlinks & Auto-text
- Review Features
 - Track Changes, Blacklines, Comments, Tasking

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Anything Covered - P1