International
Plant Protection
Convention

IPPC
ONLINE COMMENT SYSTEM
USER MANUAL

Contents

1. Introduction to the IPPC Online Comment System

The IPPC Online Comment System provides IPPC stakeholders a safe and secure place to insert, share and submit comments on documents; for the IPPC Secretariat to compile comments in a simple and efficient manner and to provide data for analysis.

Background

The IPPC Secretariat developed the first version of the system in 2011, which is used for consultation on draft specifications and draft ISPMs.

Given the rapid evolution of online technologies and issues with the system's compatibility, performance and user-friendliness, in 2014 the IPPC Secretariat joined the Codex Alimentarius Secretariat to procure an off-the-shelf product meeting user needs.

What were some of the user requirements for this new system?

In 2014, the Secretariat launched a survey asking OCS users (of the IPPC network) what their most important needs and challenges with the system were. The Secretariat received the feedback below, which was compiled with its own requirements from FAO:

- Multi-tenant license
- Multilingual
- Compatible with mobile devices and all major internet browsers
- User friendly
- Minimal user registration and management can be done within the organization and not by the Secretariat
- Customizable
- One user can have multiple roles
- Possibility of internal and external reviews
- Comment categories
- Email notifications
- Search capabilities
- Data and report exporting

Why do we have a new system?

The Secretariat has decided to implement the new Online Comment System because it:

- is a faster and more reliable system
- has a more simplified layout
- is compatible with all major internet browsers and mobile devices
- provides direct access to organizations to the documents under review, without requiring Secretariat management of accounts and granting access
- provides intuitive document navigation provides an improved search function for users

Why is there a difference in terminology in the new system?

To save resources, the Secretariat purchased an already-made, off-the-shelf product, which is shared with the Codex Alimentarius Secretariat. This means that some parts of the system are customizable, but not all aspects. Table 1 compares the terminology used in the previous and new versions of the system.

Table 1: List of terminology used in the previous Online Comment System and the new system

Previous version	New system
Consultation	Review
Explanation	Comment
Edit	Proposed change
Submit comments	Publish comments
Compiled comments	Reconciliation report
Sharing (in-country collaborating and global rule sharing)	Distribution lists (personal and shared)
N/A	Workgroups and Sub-workgroups
Roles: Contact Point, Assistant and Reviewer	Roles: Author (Contact Point), OCS Deputy (Assistant), and Reviewer

System roles
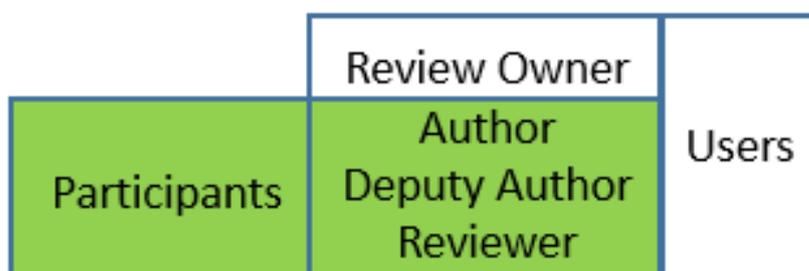
- Review Owner → IPPC Secretariat.
- Author → Contact Point (See section 6).
- Deputy Author → Delegated by Contact Point (See section 6).
- Reviewer → See section 6.
- Participants (to a review): author, deputy author, reviewer
- User: everyone holding an account.

2. Useful resources and contact information for the IPPC Online Comment System

The IPPC Secretariat has produced several resources to help you use the Online Comment System. Most of these resources are on the IPPC website, or 'IPP'.

To access the available resources about the system, visit www.ippc.int. From the IPP home page, select Core Activities, then Standard Setting. Once on the Standard Setting Home page, select 'IPPC Online Comment System (OCS)' on the right-hand side. This will bring you to the system's resources page, where you can find training materials, helpful links, and Secretariat contact information. You may want to bookmark this page for future reference.

If you need any assistance with the system, contact the IPPC Secretariat at IPPC-OCS@fao.org. The Secretariat usually returns emails within 24 business hours after receiving requests for assistance. If you have not received a response email within 48 business hours, check the 'junk' or 'spam' folder of your email system for a Secretariat response. If you still have not received a Secretariat response within 72 business hours, resend your email to IPPC-OCS@fao.org and include a telephone number at which we can contact you to resolve your issue.

3. Homepage and dashboard

To access the IPPC Online Comment System, visit https://ocs-new.ippc.int/. The IPPC Online Comment System homepage (see Figure 1) includes the login area, links to training material and documents open for consultation. In case of further assistance, an email address to contact the Secretariat is displayed at the bottom of the page. The system is available in English, French and Spanish.

Figure 1: View of the IPPC Online Comment System home page
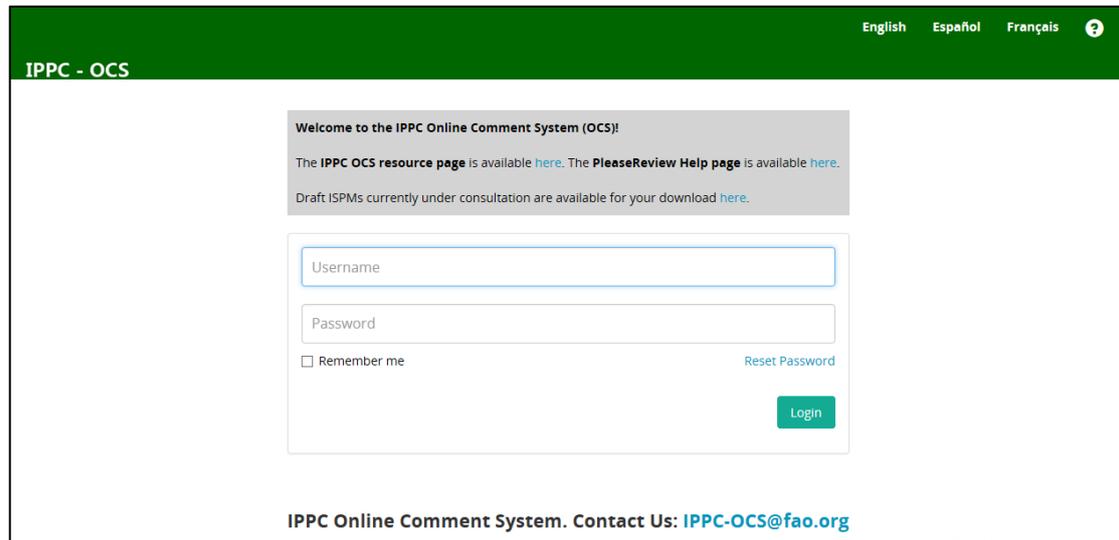
4. Login, how to retrieve your password, and how to change your password

To access the IPPC Online Comment System, visit https://ocs-new.ippc.int/. To login, enter your username and password in the login field, and select 'login' (Figure 2).

Figure 2: View of the IPPC Online Comment System home page, with the login area indicated
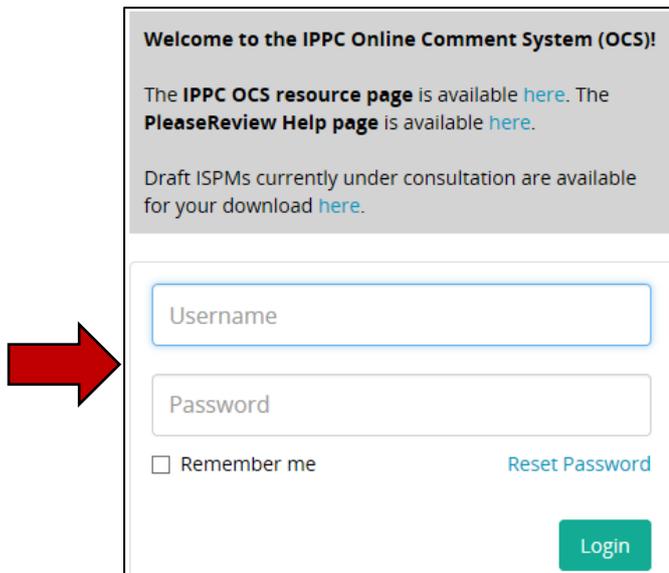
If you have forgotten your username or password, select the 'reset password' link on the OCS home page. This will direct you to a screen to enter the email address associated with your account. The system will automatically send an email to you with instructions on how to reset your password. If you have not received a response email within one hour, check the 'junk' or 'spam' email box. If you need any further assistance, contact the IPPC Secretariat at IPPC-OCS@fao.org.

To change your password, login to the system and select the 'user settings' icon (Figure 3). Next, select the 'profile' tab in the user details window (Figure 4). Then, under 'user details', enter your old password, the new password you would like to use, and re-enter the new password again in the 'confirm password' field (Figure 5). Select 'OK' to save your changes.

Figure 3: Indicating the location of the 'user settings icon' after logging into the system
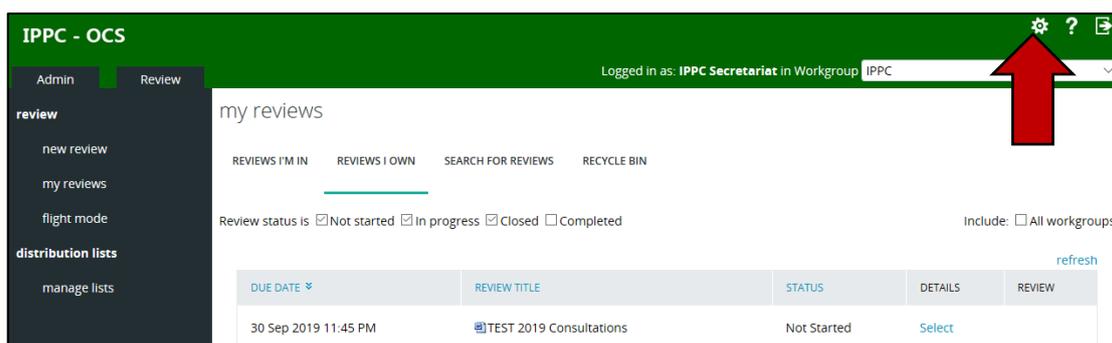
Figure 4: Indicating the location of the 'Profile' tab in the user details window
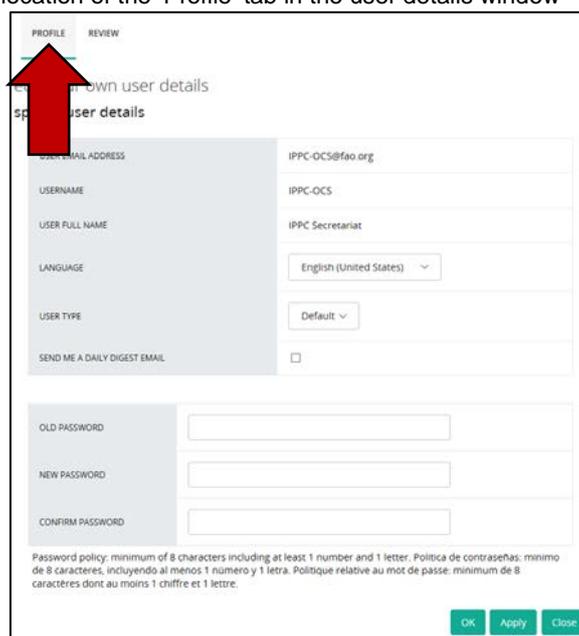

Figure 5: Indicating the where on the 'profile tab' to change your password
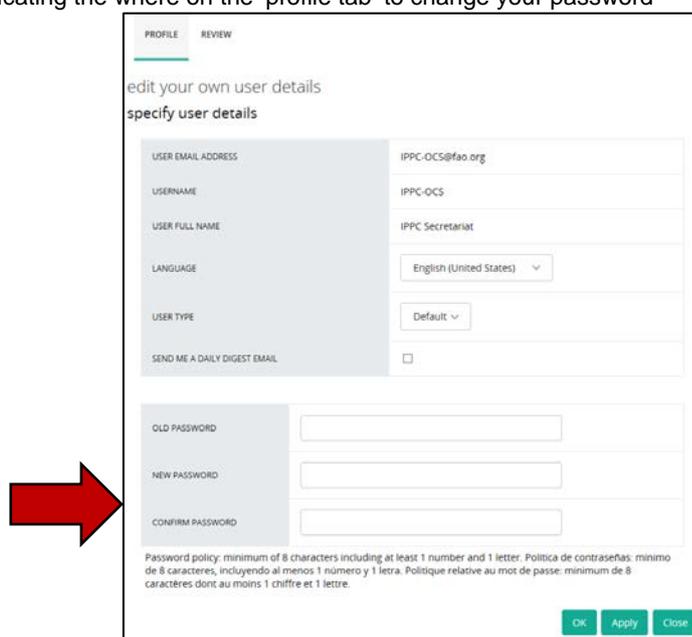

To logout of the system, select the logout icon in the upper right corner of the system (Figure 6). You will receive a message confirming you wish to logout. Select 'yes' to logout.

Figure 6: Indicating the location of the 'logout icon' to logout of the system
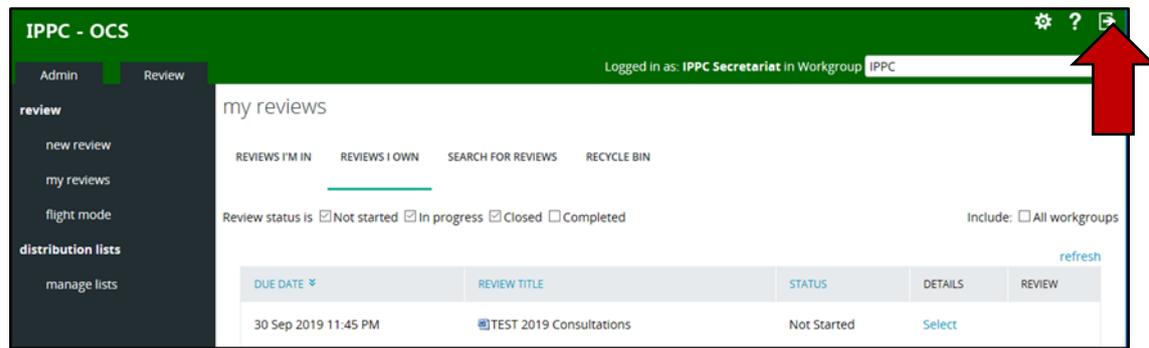
5. Invitation email

Once the Secretariat makes the documents available for review, the Author (IPPC Official Contact Point) will receive an invitation email that you may start commenting on the documents. It is the responsibility of the Author to ensure that the email account on the IPPC website is current. Figure 7 shows a sample email that will be automatically generated by the system when documents are available for review.

Figure 7: Sample invitation email when a document is made available for review
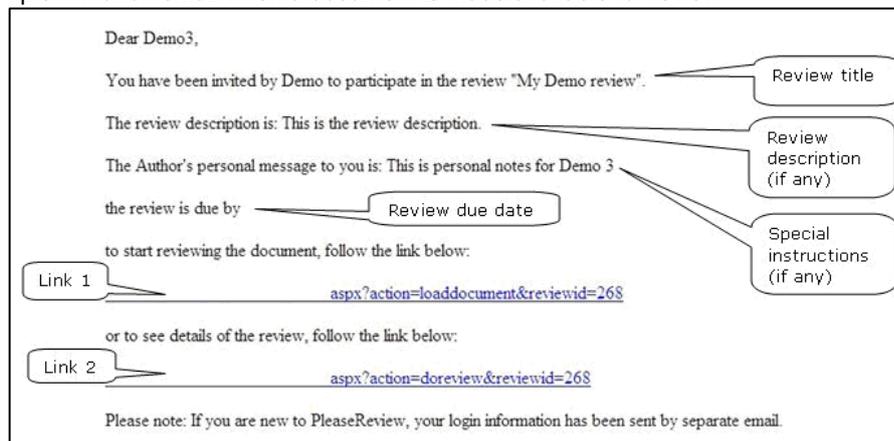
6. User Types and Roles

There are two main roles in the Online Comment System:

- **Author (IPPC Official Contact Point):** The Author is the only user able to publish (submit) the final comments to the Secretariat on behalf of his or her organization. The Author can also authorize a Deputy Author who can perform all the actions of the Author, excluding publishing the final comments to the Secretariat. The Secretariat only manages the Author account.

- **Reviewer:** Reviewers can add comments and propose changes to documents. The system allows up to three reviewers for each organization. The Author or Deputy Author (not the Secretariat) manages the Reviewer accounts.

7. Creating user accounts and assigning users in your organization to a role

Each organization is allowed a maximum of five user accounts: one Author, one Deputy Author and three Reviewers. Authors and Deputy Authors can manage the accounts. The Secretariat manages only the Author (or IPPC Official Contact Point) account for each organization. It is the responsibility of the Author to manage the accounts of the optional Deputy Author and three optional Reviewers.

To create the reviewer accounts, the Author or Deputy Author must first login to the system. In the upper right corner of the system home page, ensure the Author login is displayed as 'Logged in as: "User Full Name" in Workgroup'. You should then see a drop down selection with IPPC and below that another group. Select the group below IPPC (see Figure 8). Next, select the 'Admin' tab, and select the link 'users'. Next, select 'Add new user' (Figure 9). Enter the user details and ensure you assign the user a role, such as reviewer. Select 'OK' to save your changes (Figure 10).

Figure 8: Indicating where the Author or Deputy Author should confirm they are in the correct workgroup
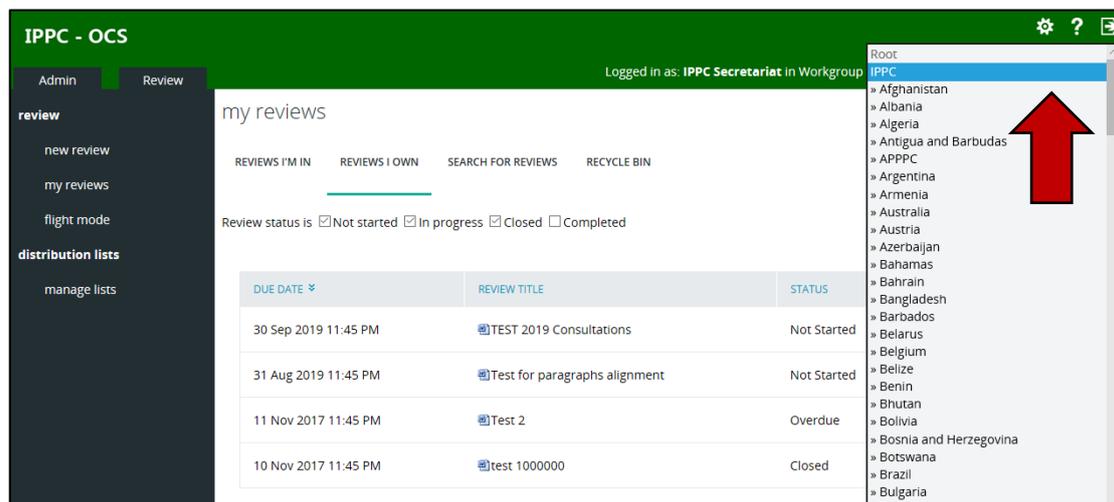
Figure 9: Indicating the location of the 'Admin' tab, 'users' link, and 'Add new user' button
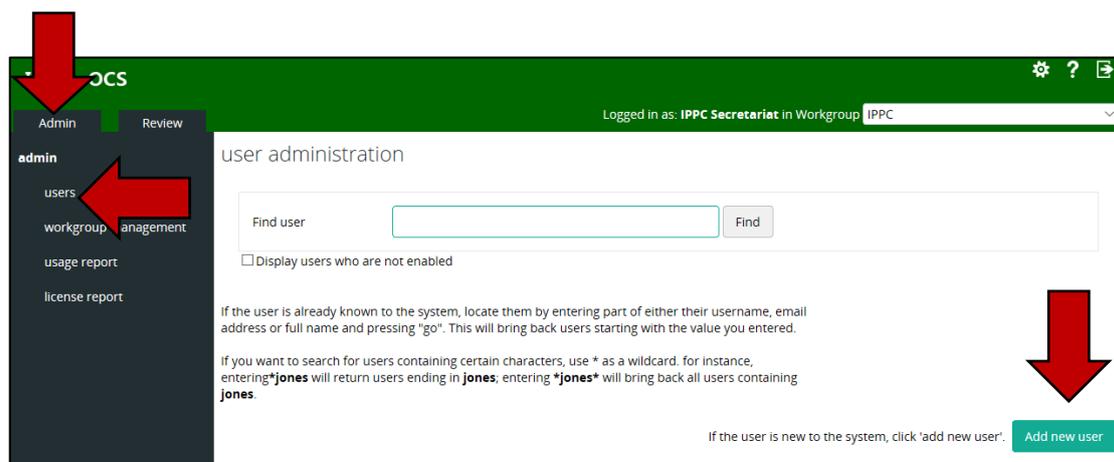
Figure 10: Showing a sample of the page of where to enter the user details

To manage how many user accounts you have, select the 'Admin' tab, and select the 'license' link (Figure 11). The number to the right of 'Total Available' will display how many user accounts you can assign (Figure 12).

Figure 11: Indicating the location of the 'Admin' tab and the 'license' link

Figure 12: Indicating the location of the number of user accounts available to assign, indicating 495 users are available to assign

License management

Root » IPPC » Test-IPPC-Country1 (ID:112)

Current Workgroup

LICENSE USED		Master License (ID: 103)				
WORKGROUP		IPPC				

AVAILABLE LICENSE	LICENSE TYPE	LICENSED	LICENSED TO SUB	IN USE	AVAILABLE	REMARKS
STANDARD	Named	1000	569	41	390	
ENHANCED	Named	0	0	1	(1)	1 user(s) only require an Enhanced license but are using a Power level license because no Enhanced licenses remain
POWER	Named	500	193	201	106	
				TOTAL AVAILABLE	495	
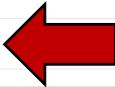
8. Accessing your profile settings and user preferences

User details can be accessed by selecting the 'user settings' icon (Figure 3). Next, select the 'profile' tab in the user details window (Figure 4).

To change your password, select the 'user settings' icon (Figure 3). Next, select the 'profile' tab in the user details window (Figure 4). Then, under 'user details', enter your old password, the new password you would like to use, and re-enter the new password again in the 'confirm password' field (Figure 5). Select 'OK' to save your changes.

To change the default language for the entire system, select the 'user settings' icon (Figure 3). Next, select the 'profile' tab in the user details window (Figure 4). Then, under 'user details', select the default language you would like displayed (Figure 13). Select 'OK' to save your changes.

Figure 13: Indicating where on the 'profile tab' to change the default language for the entire IPPC Online Comment System

PROFILE	REVIEW

edit your own user details
specify user details

USER EMAIL ADDRESS	IPPC-OCS@fao.org
USERNAME	IPPC-OCS
USER FULL NAME	IPPC Secretariat
LANGUAGE	English (United States)
USER TYPE	Default
SEND ME A DAILY DIGEST EMAIL	☐
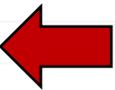
OLD PASSWORD	
NEW PASSWORD	
CONFIRM PASSWORD	

Password policy: minimum of 8 characters including at least 1 number and 1 letter. Política de contraseñas: mínimo de 8 caracteres, incluyendo al menos 1 número y 1 letra. Politique relative au mot de passe: minimum de 8 caractères dont au moins 1 chiffre et 1 lettre.

OK   Apply   Close

To change your review preferences, select the 'user settings' icon (Figure 3). Next, select the 'review' tab (Figure 14). Then, under 'user settings', make modifications based on your review preferences (see also Figure 14). Select 'OK' to save your changes.

Figure 14: Indicating the location of the 'Review' tab in the user details window
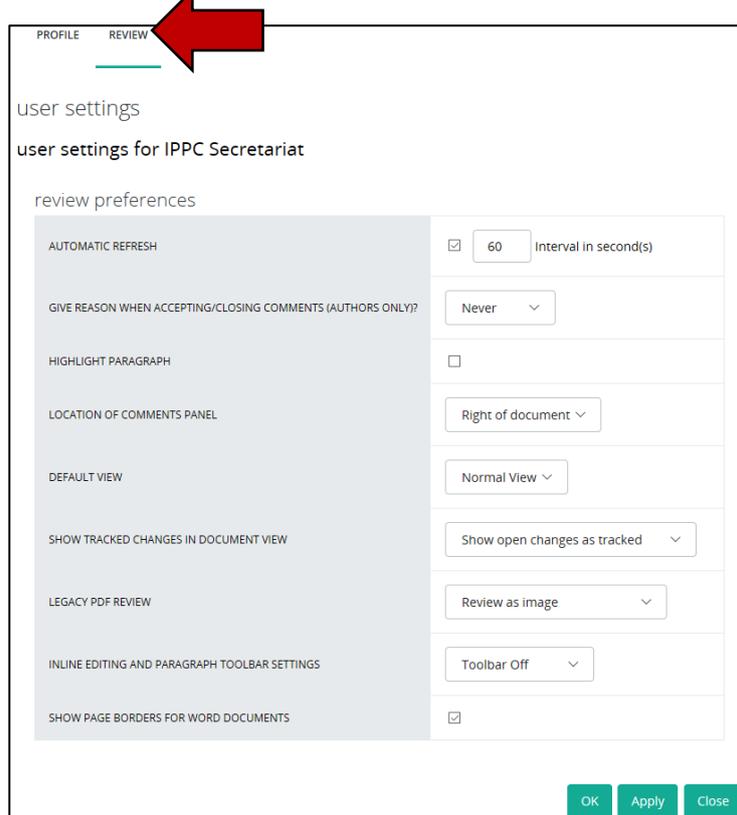
9. Quick navigation in the system

The top menu allows for quick navigation within the system (Figure 15 and Table 2).

Figure 15: Location and appearance of the top menu in the system
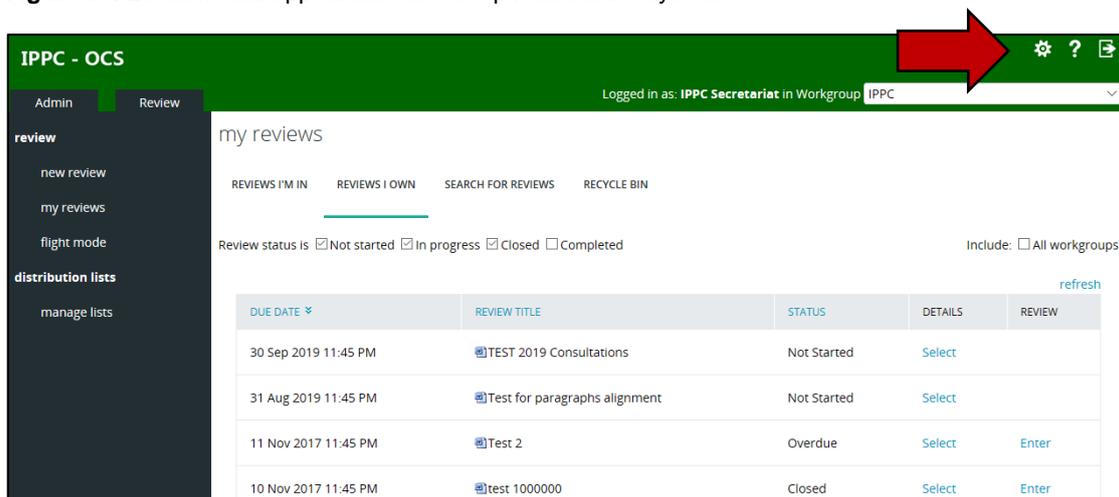
Table 2: Provides a view of the icons in the top menu and a brief description of the action taken when the icon is selected

Icon	Description
?	Access to the comprehensive Help website
⚙	Opens the user settings window

Icon	Description
	Logs the user out of the system or exits the review area

10. Accessing documents for review

To access documents for review, first login to the system. Then select the 'Review tab', then 'my reviews'. Select the 'Reviews I'm in' tab. This will display the table of all the documents available for you to review (Figure 16). You should then see a drop down selection with IPPC and below that another group. Select the group below IPPC (see Figure 8).

Figure 16: Indicating the location of the 'Review' tab, 'my reviews' link, 'Reviews I'm in' tab, and how to enter the document to begin reviewing
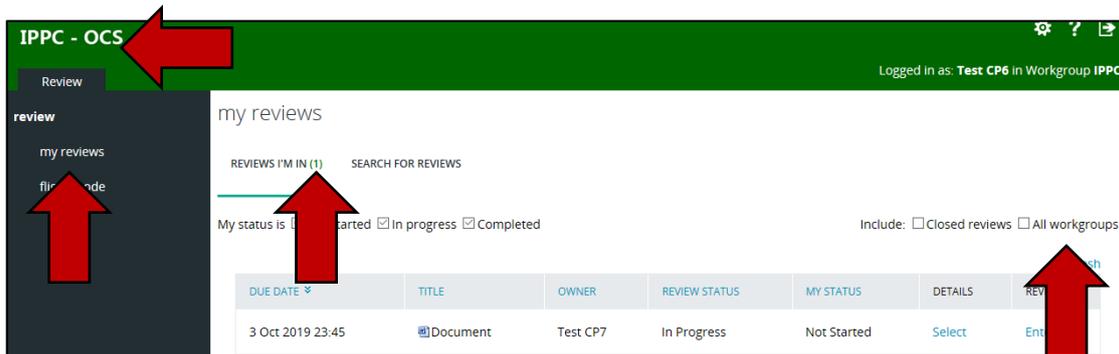
Looking in more detail at the 'Reviews I'm in' tab:

- 'Due Date' is the date and time you will no longer be able to comment on the document. If you need more time to comment, contact your organization's Author (IPPC Official Contact Point) or Deputy Author to grant you an extension in the system
- 'Title' is the title of the document available for comment
- 'Owner' is whoever sent the document out for comment, usually the IPPC Secretariat
- 'Review Status' is the overall status of the document, indicating whether the consultation period is in progress or has ended
- 'My Status' is your status of commenting on this document, indicating whether you have started or finished commenting
- By selecting 'Select' under Details, you will receive a detailed overview of your commenting details on that specific document
- By selecting 'Enter' under Review, you will be taken to the commenting area for that document, where you will be able to begin commenting on the document

The review listing may be sorted by clicking on the column headers. The or icons indicate which column the list is currently sorted by and the direction of the sort (ascending and descending, respectively).

Under the 'Review status' column, the status options in Table 3 may be displayed. Under the 'My status' column 5, the status options in Table 4 may be displayed.

Table 3: Provides status options for each document review managed by the Secretariat and a brief description of each status

Status	Description
In Progress	The review is in progress and the scheduled due date has not passed
Overdue	The review is still open for comment, but the scheduled due date has passed

Status	Description
Closed	The review has been closed by the Secretariat
Completed	The review has been marked as completed by the Secretariat and is read-only for all participants

Table 4: Provides status options for your comment review for each document (managed within your organization) and a brief description of each status

Status	Description
Not Started	Reviews that you have not started. Note that other users in your organization may have not started reviewing that document.
In Progress	Reviews that you have started reviewing (i.e. entered the review to view the documents) but which you have not set your status to 'Completed'
Completed	Reviews that you have set to 'Completed', but are still open for review by you and others in your organization

11. Overview of the comment area (document actions toolbar, navigation pane, review pane and comment pane)

To navigate the comment area, login to the system, then select the 'review tab', then 'my reviews'. Select the 'Reviews I'm in' tab (Figure 16). This action will display the table of all the documents available for you to review. Locate the document you want to comment on, then select 'Enter' to the far right (Figure 16). Next, you will be taken to the commenting area for that document.

In the review interface, you will see the document actions toolbar, navigation pane, review pane, and comment pane (Figure 17):

- The document actions toolbar, located across the top of your screen, allows you to perform specific actions, such as searching for specific words in the document. It also displays the amount of time remaining to comment on the document.

- The navigation pane, located on the left side of your screen, allows you to choose between the different languages of the document. For example, if you started commenting in English, and want to make comments also in Spanish or French, select the different language version from the navigation pane.

- The document is in the center of your screen, Comments and proposed changes are made inline within the document. Proposed changes can be made to text directly in the document and comments can be entered in the text box area. A category can be selected, if required

Figure 17: The Review Interface, Indicating the location of the 'Navigation pane', 'Review pane', 'Comment pane' and 'Document actions toolbar'. Also indicates the selected paragraph and the time remaining until the due date

**Document actions toolbar**

Time remaining until due date
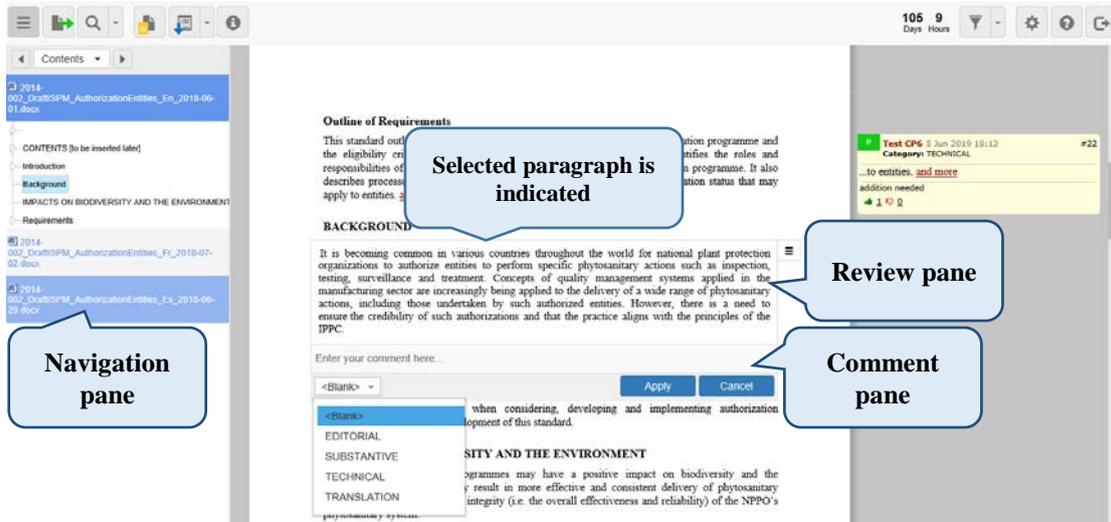
Document actions toolbar

The document actions toolbar is displayed and described in Table 5.

Table 5: Provides the icons in the Document actions toolbar and a brief description of the action taken when the icon is selected

Icon	Description
	It opens the comment window to allow a reviewer to make a general comment or view the general comments of others.
	It opens the review control panel in a new window. This is a read-only version of the review control panel and displays the information associated with the review. No actions are available from this view.
	It opens download options for the reconciliation report in a new window. It opens a copy of the original document. This is the same as downloading a copy of the document from the IPPC website, and the standard web dialog will appear. By default, the document will be 'read only'.
	It opens 'Find' in a new window. This allows the reviewer to search for specific words or phrases. All instances are displayed with their paragraph ID. Clicking on the paragraph ID takes the reviewer to that instance within the open review window.
	This icon will only show within Sub reviews and will allow publishing to Master Review
	The drop-down box allows you to navigate by 'Contents', 'Comments', 'Mentions' and 'Zones'. It also allows access to the find option.
	It opens the user settings dialog where users can set their review preferences.
	It Opens the online help site in a new window, which a comprehensive user manual.
	To leave the review.
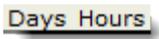
Icon	Description
Days Hours	This icon displays the remaining time until the end of the review.

12. How to add comments and proposed changes

It is important to note that IF NO INTERNAL REVIEW IS AVAILABLE all comments inserted by, or shared with and later accepted by, the Author (IPPC Contact Point) are automatically sent to the IPPC Secretariat when the commenting period is over. The Author does not need to manually publish (submit) the comments to the Secretariat.

If an internal review is available, the Author must manually select the "Publish" icon at the top of the screen in the Document actions toolbar. Otherwise, the comments WILL NOT BE PUBLISHED (submitted) to the IPPC Secretariat.

General comments

To enter a general comment (broad in scope and not based on a specific paragraph), go to the document actions toolbar and select the 'general comments' icon (Figure 18). In the General Comment dialogue box 'enter a comment', provide your comment, or justification, for your proposed change. Next, select the category for your comment: editorial, substantive, technical, or translation from the drop down menu. Select 'Apply' to save your changes (Figure 19). You will now see your general comment at the top of the review pane.

Figure 18: Indicating the location of the 'General Comments' icon on the Document actions toolbar
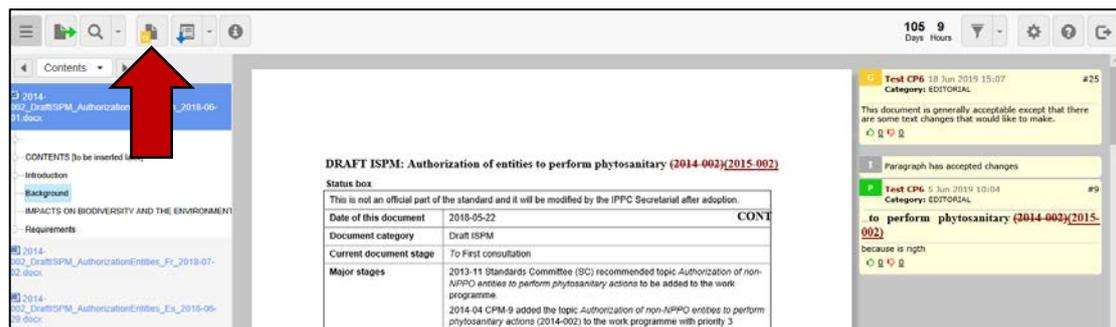
Figure 19: Indicating where to enter a general comment, select a comment category (editorial, substantive, technical, or translation), and apply the general comment in the system
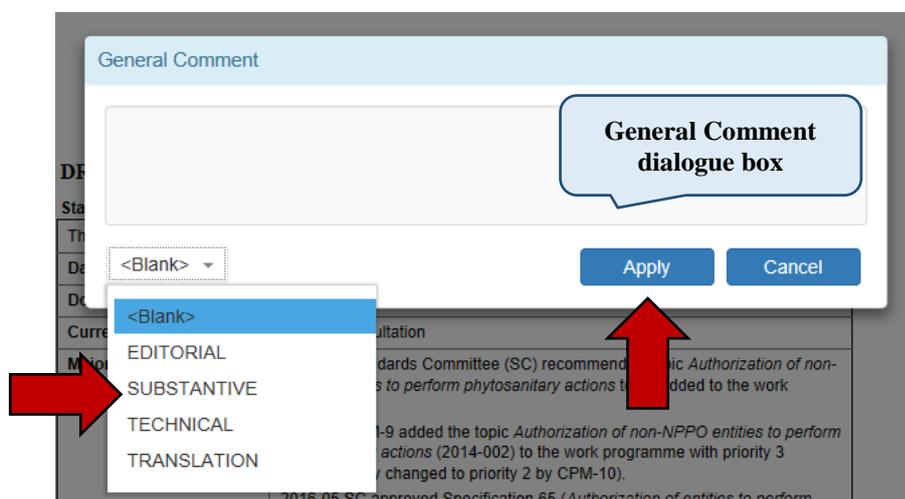
Specific comments

To enter a comment, go to the review pane in the centre of your screen, locate the paragraph you want to comment on, and select the paragraph. The paragraph text will be shown within an inline editor. (Figure 20).

Figure 20: Indicating where to select a paragraph in the review pane (red arrow points to the inline editor allowing proposed changes to the text to be recorded and or comments made in the "Enter your comments here" in the review pane), and view the text in the comment pane
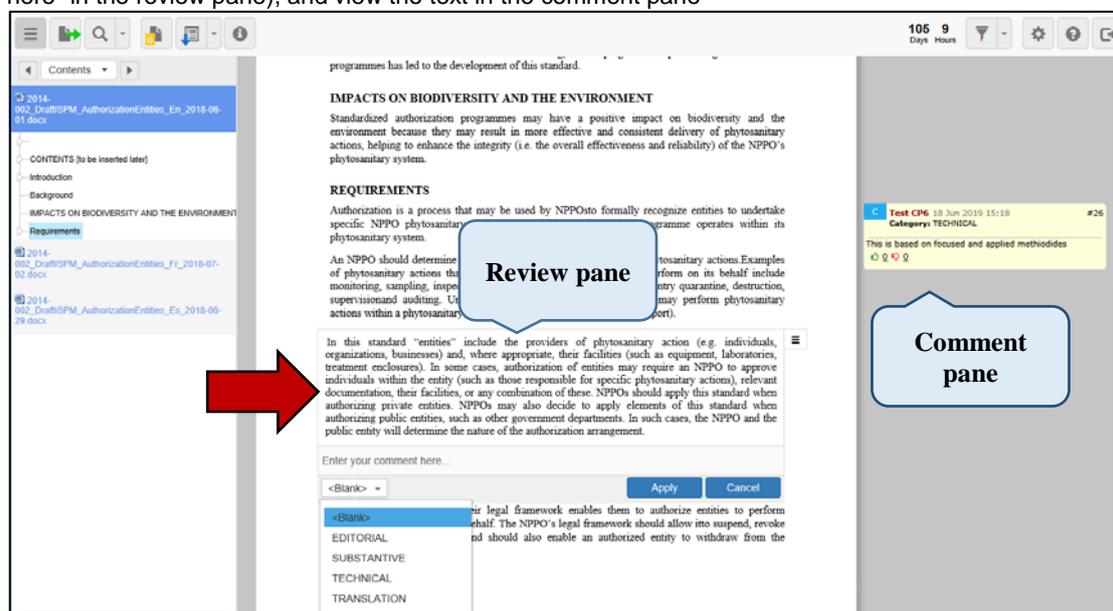
In the comment pane, under 'enter your comment here' provide your comment, or justification, for your proposed change. Within the inline editor modify the text based on your proposed change. Next, select the category for your comment: editorial, substantive, technical, or translation (elaborated below) from the drop down menu. Select 'Apply' to save your changes (Figure 21). You will now see your proposed changes in the review pane as coloured text and in the comment pane (Figure 22).

Four comment categories are available:
- **Editorial:** This type of comment clarifies or simplifies the text without changing the meaning. This includes spelling or grammatical corrections, suggestions of different but equivalent words and simplifications of sentence structure.
- **Substantive:** This type of comment takes into account conceptual changes and the addition of new aspects or ideas. This type of comment contains additions or extensions as well as changes, reorganizations of the text or deletions resulting in alteration of the content of a sentence / paragraph / section of the draft.
- **Technical:** This type of comment takes into account scientific corrections and technical adjustments. It aims at further clarification and improvement of the standard and sometimes at conformity with other standards from the technical viewpoint.
- **Translation:** This type of comment corrects points that are considered to be inaccurately translated into another language version of the text.

Figure 21: Inline editor indicating where to enter your comment, propose your change to the text, select a comment category (editorial, substantive, technical, or translation), and apply the change in the system
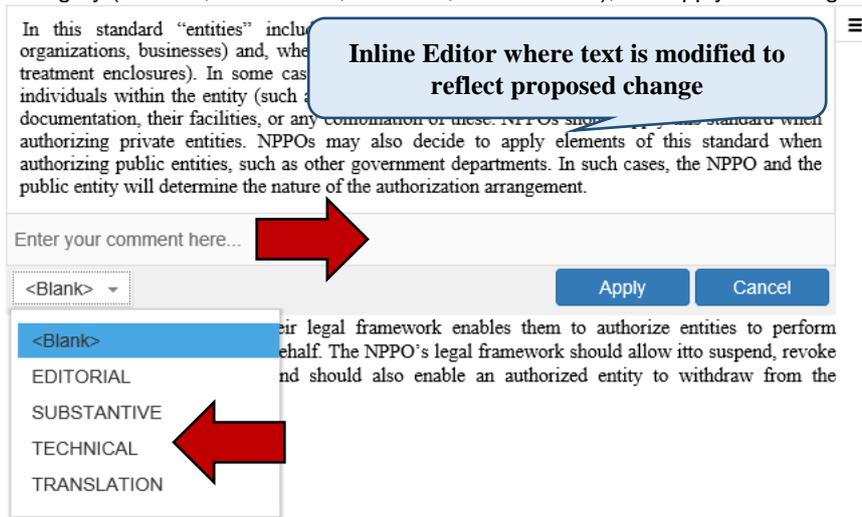
figure 22: Review pane indicating the proposed change and how this is detailed within the Comment pane
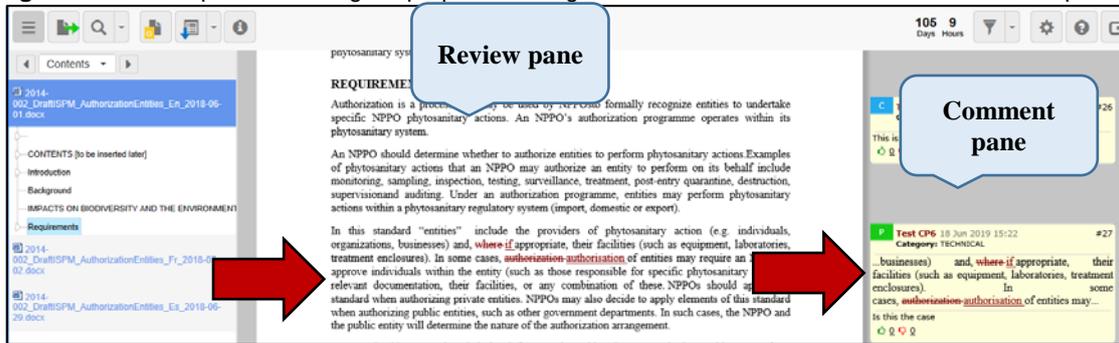
13. Changing and deleting comments

First, login to the system, then select the 'review tab', then 'my reviews'. Select the 'Reviews I'm in' tab (Figure 16). This option will display the table of all the documents available for you to review. Locate the document you want to comment on, then select 'Enter' to the far right (Figure 16). Next, you will be taken to the Review Pane for that document.

To change a comment, go to the comment pane, locate the comment that you want to change, select the 'Edit' link for that comment (Figure 23). The comment will be opened for you to modify. You can modify the comment, the proposed changes, and the comment category. Select 'Apply' to save your changes. Select 'Cancel' to not make any changes. (Figure 24)

Figure 23: Indicating how to select a paragraph in the Review pane to view the comments in that paragraph, and how to select 'Edit' on a comment in the comment pane
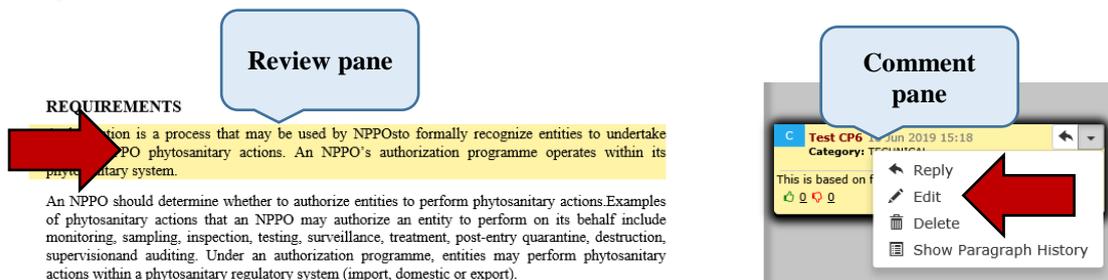
Figure 24: Edit comment pane indicating where to edit your comment, edit your proposed change to the text, change your comment category (editorial, substantive, technical, or translation), and save your change in the system

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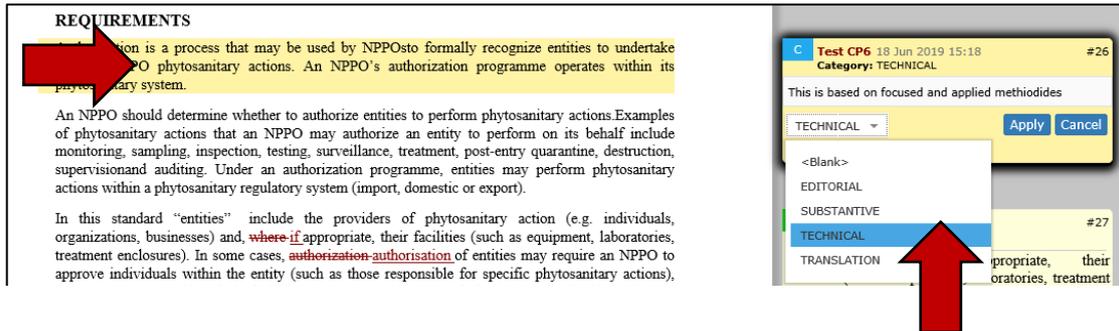
To delete a comment, locate the comment you want to change and select drop down menu on the right-hand side and select the 'Delete' link for that comment (Figure 23). The system will ask you to confirm whether you want to delete the comment. Select 'yes' to delete the comment.

Figure 25: Indicating how to select a paragraph in the Review pane to view the comments in that paragraph, and how to ~~delete~~ a comment in the comment pane

14. Leaving the review

When you have finished commenting on a review, select the 'leave the review' icon (see Table 5). The 'finish review' window will appear where you can update your participant status (Figure 26) and have it recorded in the control panel. Select your status (see Table 6) using one of the radio buttons provided. You can also enter summary comments in the space provided and choose to set up email notifications when there is activity during the review. When you are done, select 'OK'. (Figure 26)

Figure 26: Indicating how to update your participant status when you have finished your review, including selecting your participant status, entering a summary comment, and setting email notifications
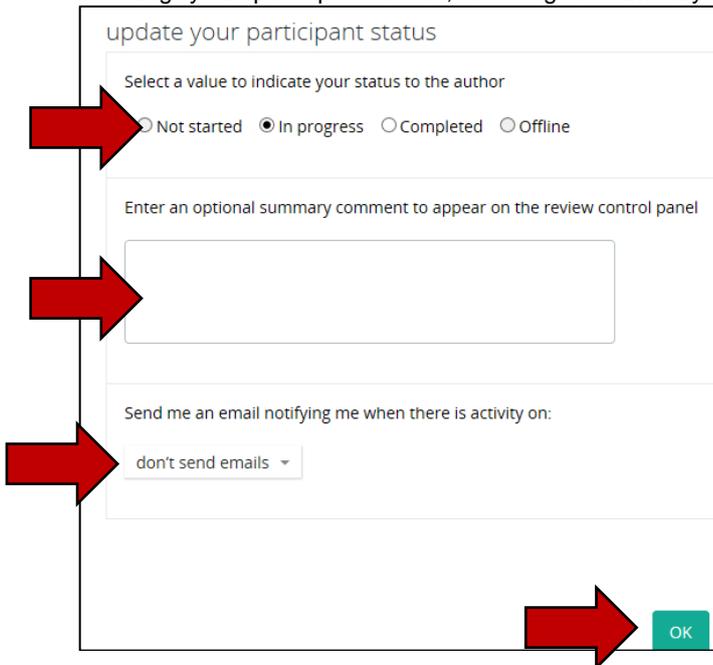
Table 6: Participant status options for the 'finish review' window

Review Status	Description
In progress	The Reviewer has started reviewing the document. This status is set automatically by the system once you enter the review for the first time. On leaving the review you have the option to leave your status as 'In progress' or to indicate that you have completed your review by selecting 'Completed'.
Completed	The Reviewer has indicated that they have completed their review of the document. The Reviewer can return to the review and comment at any time (regardless of this setting) until the Secretariat has 'Closed' the review.

The summary comments are displayed in the review control panel and in the comment reconciliation report. Note that the Author's participant status remains 'In progress' when the review is open and 'Completed' when the review is closed.

15. Review control panel

The review control panel summarizes the review for a document, including the participants involved in that review, and your status within the review, and an overview of your comments. You can also take certain actions from the review control panel, such as:

- viewing reports
- entering the review
- creating a sub-review
- updating your participant status
- downloading a copy of the draft document (original with or without your comments)
- delegating
- and a feature to access the email address of all workgroup participants in your review

To access the review control panel, login to the system, then select the 'Review tab', then 'my reviews'. Select the 'Reviews I'm in' tab. This will display the table of all the documents available (Figure 16). Next, locate the document you want to access the review control panel, then select then choose 'Select' in the Details column for that document (Figure 27). This will open the review control panel (Figure 28).

Figure 27: Indicating the location of the 'Details' link, which will open the review control panel
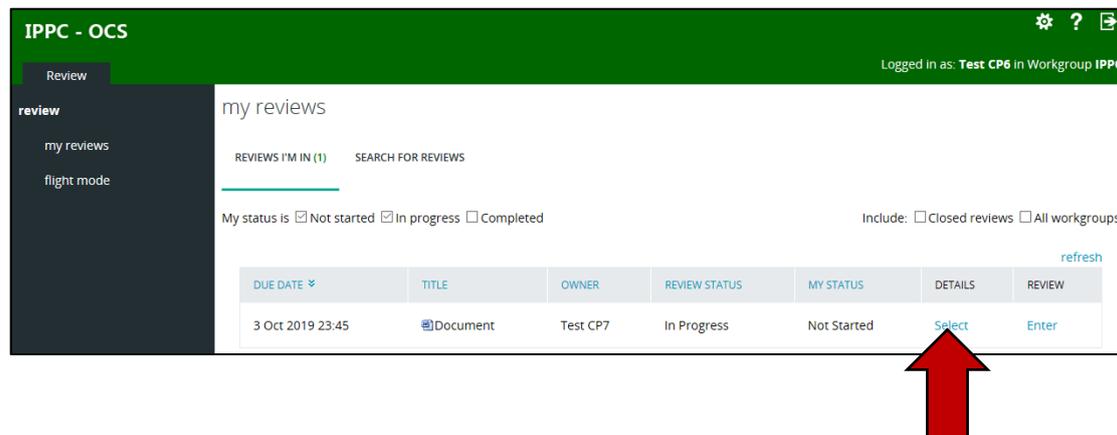
Figure 28: Showing the Review control panel, and indicating where to download quick Microsoft Word and Excel reports

]

16. Reports

The IPPC Online Comment System allows you to download various types of reports, which contain summary information on the review and all comments for the document.

To produce reports, login to the system, select the 'Review tab', then 'my reviews'. Next, select the 'Reviews I'm in' tab. This will display the table of all the documents available (Figure 16). Next, locate the document you want to access the review control panel, then select then choose 'Select' in the Details column for that document (Figure 27). This will open the review control panel (Figure 28).

To run a quick, complete report in Microsoft Word or Excel, go to the review control panel (Figure 28), and select the Excel icon [icon] to download the report as an Excel document or the Word icon [icon] to download the report as a Word document and follow the prompts on your screen.

To run more customized reports, login to the system, select the 'Review tab', then 'my reviews'. Next, select the 'Reviews I'm in' tab. This will display the table of all the documents available (Figure 16). Next, locate the document you want to access the review control panel, then choose 'Select' in the Details column for that document (Figure 27). This will open the review control panel (Figure 28). Select 'View Report' (Figure 28) to open the report window. The first table in the report window (Figure 29) shows the summary of the document under review, including the end date of the review and the user's current review status. The second table in the report window lists the participants in the review, including their status, role, and number of comments

entered to date. The third table in the report window lists the comments on the draft, indicating the paragraph number, the original paragraph text, the comment type, the comment with proposed change, the comment status, and the Author (Contact Point) comment.

Figure 29: Showing the report window, and indicating the select comments button, summary, participants, and comment summary tables

To customize the report, choose 'Select Comments' (Figure 29), which will open a new window (Figure 30). This will allow you to customize the report to include and exclude various comments. Note that all comments are shown by default. After you have customized your report, select 'OK'.

Figure 30: Showing the window in which you can customize your report

To download the document as a Microsoft Word file, select the link 'download report as word' and follow the prompts on your screen.

You can also download the document with paragraph numbers. In this version, each paragraphhas a paragraph number added in square brackets to and coloured blue - for example [1], [2]. This allows you to match the comment paragraph in the report to its exact location in the document. To download the paragraph numbers document, select the link 'download document with paragraph numbers' and follow the prompts on your screen (Figure 29).

17. Delegation

Authors (IPPC Official Contact Points) can delegate their role on the review to a Deputy Author. Note that the Deputy Author can do all of the actions of the Author, excluding submitting the final comments to the IPPC Secretariat.

To delegate, the Author must login, then select the 'Review tab', then 'my reviews'. Select the 'Reviews I'm in' tab. This will display the table of all the documents available (Figure 16). Next, locate the document you want to choose a Delegate, then select then choose 'Select' in the Details column for that document (Figure 27). This will open the review control panel. To delegate a Deputy Author for this document, select the 'Delegate' link (Figure 31).

Figure 31: Indicating the location of the 'Delegate' link, which will open the Delegate page

In the Delegate screen, you can search for users individually or display all available users in your Workgroup. The user you are delegating must already be in the current workgroup. To find users to delegate, you can use the dropdown menu or use the search field (Figure 32). When using the search field, locate users by entering part of either their user name, email address or full name, and select 'Go'. This will list the users starting with the value you entered. If you want to search for users containing certain characters, use (*) as a wildcard. For example, entering (*jones) will return users ending in 'jones'; entering (*jones*) will bring back all users containing 'jones'.

Figure 32: Indicating the location of the drop down menu and the search field where you can find users to delegate

Locate the user you want to delegate the role of Deputy Author and choose 'Select' next to his or her name (Figure 33). Next, confirm the user you selected and provide special instructions (optional). Selection 'OK' to confirm the selection of the Delegate (Figure 34). **It is important to note that once you have completed the delegation, you will not be able to reverse it and will no longer be active in the review for this document. Your status in this review will be set to 'Completed'.**

Figure 33: Indicating how to select a user to delegate in the Delegate window
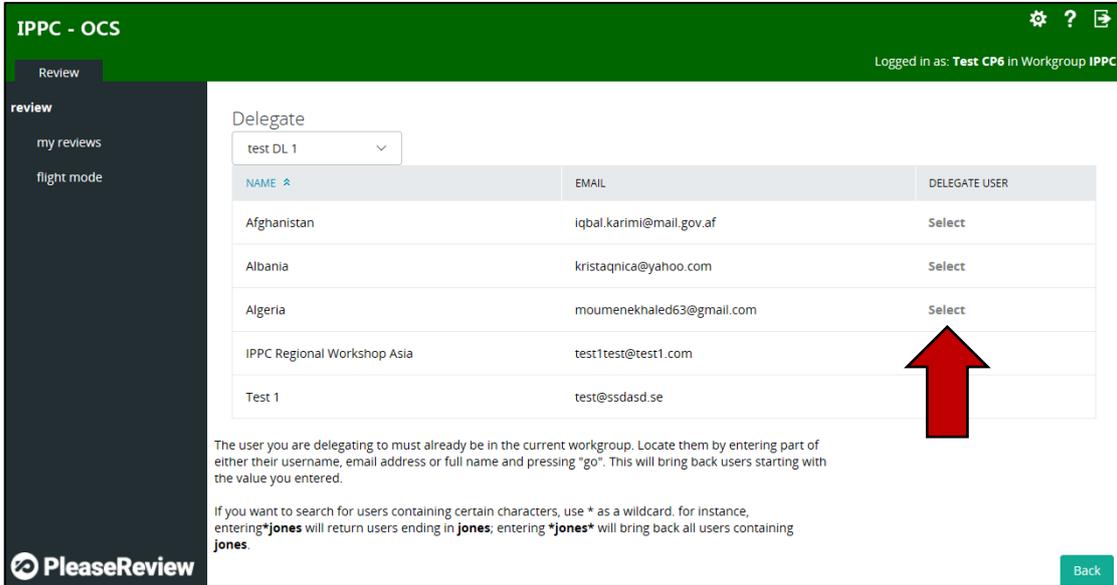
Figure 34: Indicating where to enter special instructions and to confirm the delegate
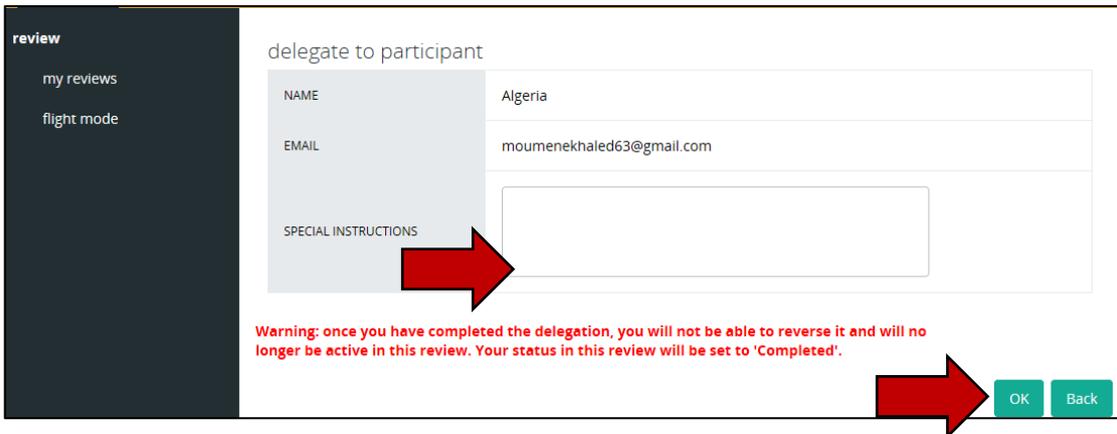
18. Optional internal review

Authors or Deputy Authors have the option to coordinate the internal review of documents, which the system calls a 'sub-review'.

To create a sub-review, first login to the system. Then select the 'Review tab', then 'my reviews'. Select the 'Reviews I own' tab (Figure 35). You should then see a drop down selection with IPPC and below that another group. Select the group below IPPC (see Figure 8). Locate the document in which you want to create a sub-review. Under the 'Details' column to the far right of that document, choose the link 'Select' (Figure 35). You will be taken to the review control panel, where you will select the 'Create Sub-Review' link' (Figure 36). Next, you will be asked to confirm whether you want to create a sub-review. Select 'OK' to continue.

You will be asked to follow a series of steps to set up the review (Figure 37).

Step 1 is to specify the review details, such as the title, type and dates for the review:

- Title: The system will automatically fill in the document title with '[Sub-review]' at the end. You can modify the title as you wish

- Description: You can add any description you wish

- Review Type: The options are None, Default, Poll, and Question. If you want to simply gather comments on a document, set the review type as 'Default'

- Review Flow: Leave unchecked

- End Date: Set this as the date you want your reviewers to provide comments to you. Make sure you leave enough time to review their comments and submit your organizations final comments to the IPPC Secretariat

When you completed the review details, select 'Next' (Figure 37).

Step 2 is to upload documents (optional, Figure 38). If you do not want to upload any documents, select 'Next' to go to the next step. The first table will indicate documents already uploaded for the review (such as the draft standard). You can upload additional documents here for your reviewers to consider, such as journal articles. To upload a document, select 'Browse...', and locate the file on your computer. You can change the title of the file as displayed in the table by modifying it to the right of the 'Title' field. If you want the system to recognize the Table of Contents (TOC) levels in your Word document, indicate whether you have 'None' or 'All'. Finally, indicate whether your document is a reference or feedback document. When finished, select 'Upload'. Repeat for each document. When you are finished uploading documents, select 'Next' to go to the next step.

Step 3 is to specify the participants you want for your sub-review (Figure 39). Those users already involved in the review (such as the Author and Deputy Author) are noted in the table entitled 'participants already included on this review'. To add other participants, select the relevant role e.g. 'Reviewer' or 'Viewer' and within the search box start typing their name. A list of possible matches will be shown in a dropdown list. Note that a 'viewer' cannot enter comments on the documents. When the appropriate person is listed click on their name to add. Multiple participants may be added within the search field and to finalise their inclusion select 'Add' (Figure 40). After you have added all your users, select 'Next'.

Step 4 provides you with options for the review (Figure 41). Carefully review each option and determine which options you want to incorporate into your review. When you have finished selecting your options, select 'Next'.

Step 5 of the review is to verify the details of your sub-review and either start the sub-review or put it on hold (Figure 42). Review the details of the sub-review. You can edit the details of the sub-review by selecting 'Edit' next to each of the elements. If you are ready to begin the sub-review, select 'Start Review'. If you want to start the sub-review later, select 'Place Review on Hold'.

Figure 35: Indicating the location of the 'Reviews I own' tab, and the location of the 'Select' link to create the sub-review
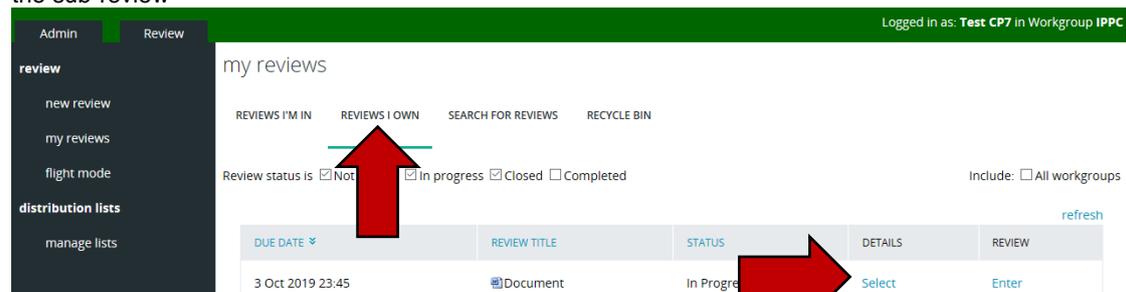
Figure 36: View of the Review control panel, indicating the location of the 'Create Sub-Review' link

Figure 37: Creating a Sub-Review Step 1: Specifying review details
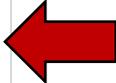
Figure 38: Creating a Sub-Review Step 2: Uploading documents

Figure 39: Creating a Sub-Review Step 3: Specifying participants

Figure 40: Creating a Sub-Review Step 3: Specifying participants, selecting reviewers

Figure 41: Creating a Sub-Review Step 4: Review options

International Plant Protection Convention

Figure 42: Creating a sub-review Step 5: Verify details and start review, or put it on hold

19. Searching for reviews

The 'Search for reviews' tab allows you to search for a specific document that is or was open for review (consultation).

To search all reviews available to you, first login to the system. Then select the 'Review tab', then 'my reviews'. Select the 'Search for reviews' tab (Figure 38). You should then see a drop down selection with IPPC and below that another group. Select the group below IPPC (see Figure 8).

Enter a key word or phrase in the search field and select 'Go' to begin searching. The search will return all reviews whose title starts with the value you entered. If you want to search for review titles containing certain characters, use * as a wildcard. For example, entering *design will return reviews ending in design; entering *design* will bring back all reviews containing design. Enter an asterisk (*) in the field to return the list of ALL reviews.

Figure 43: Indicating the location of the 'Review' tab, 'my reviews' link and 'Search for reviews' tab
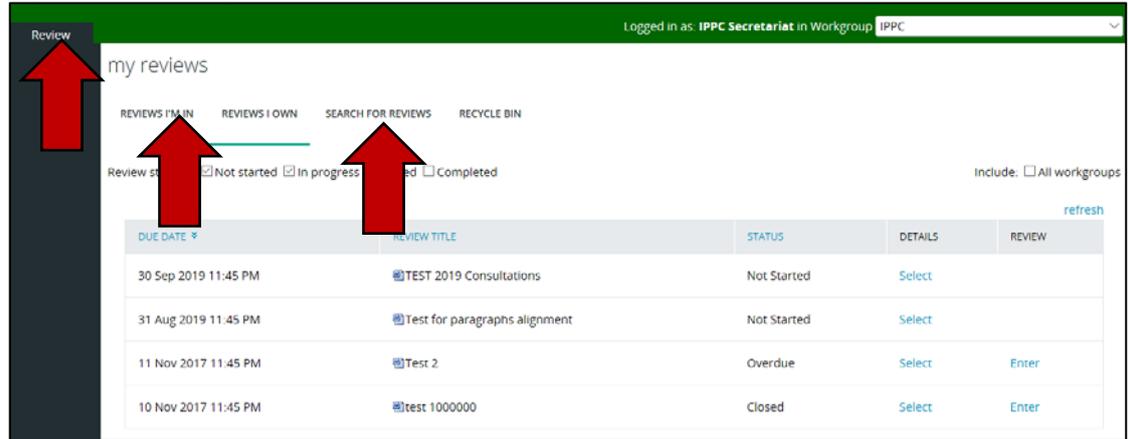
20. Accepting and closing comments

> It is important to note that IF NO INTERNAL REVIEW IS AVAILABLE all comments
> inserted by, or shared with and later accepted by, the Author (IPPC Contact Point) are
> automatically sent to the IPPC Secretariat when the commenting period is over. The
> Author does not need to manually publish (submit) the comments to the Secretariat.
>
> If an internal review is available, the Author must manually select the "Publish" icon at
> the top of the screen in the Document actions toolbar. Otherwise, the comments WILL
> NOT BE PUBLISHED (submitted) to the IPPC Secretariat.

To accept or close comments, the Author or Deputy Author must login to the system, then select
the 'review tab', then 'my reviews'. Select the 'Reviews I'm in' tab (Figure 16). This will display
the table of all the documents available for you to review. Locate the document you want to
comment on, then select 'Enter' to the far right (Figure 16).

To accept or close a comment, go to the comment pane. There are three ways to move quickly
to each comment or proposed change.

Accepting and Closing using the Toolbar

Figure 44: Indicating the location of the 'Accept' and 'Close' functions within the toolbar
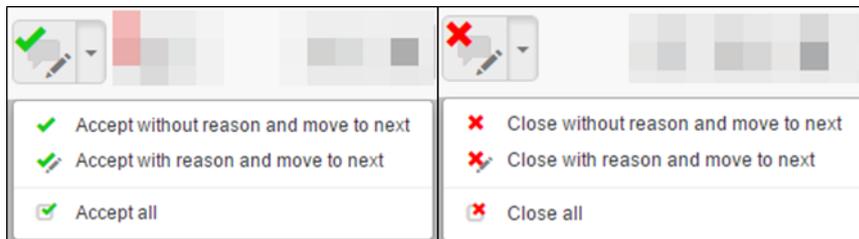
The Author or Deputy Author should first set their preference to "prompt for a reason" using
the options available.
•   Selecting the 'Accept with reason and move to next' will allow the Author/Deputy to
accept a comment or change, enter a reason and then move to the next open comment or change
in the review;
•   Selecting the 'Accept without reason and move to next' will provide a 'one-click'
action for accepting comments and proposed changes, allowing the Author/Deputy to accept a
comment or change without giving a reason and move to the next open comment/change in the
review;

• It is possible to change the 'prompt for a reason' preferences as required, and therefore the Author/Deputy can alternate between settings if appropriate;

• The 'Accept all' option will allow the Author/Deputy to accept all open comments and changes at once. See Accept/Close All;

• The settings for 'Close' work in the same way as described above.

Once the preference has been set, the Author/Deputy can simply click either 'Accept' or 'Close' on the toolbar for each comment/change in the review. As soon as a comment or proposed changes have been accepted/closed, OCS will automatically jump to the next open comment/change in the review. This allows the Author/Owner to move quickly through all open comments and proposed changes in the review, based on their filter settings.

Accepting and Closing using the Quick Accept/Close Icons

The 'Quick Accept' icon and 'Quick Close' icon displayed on each open comment or proposed change can be used to quickly accept/close comments and proposed changes in the review.

The quick accept and close icons can be seen in the bottom right corner when the Author/Owner hovers over or selects a comment/proposed change in the review pane. See figure 45.

Once the quick accept or quick close icon has been selected, the Author/Owner may have the option to enter a reason depending on their 'Give Reason' setting. To change the setting select the settings icon ⚙ and select the appropriate 'Give reason when accepting/closing comments'- See figure 46:

Figure 45: Indicating the location of the Quick 'Accept' and 'Close' functions within the Comment/ Proposed change

Once accepted or closed, the Author receives the option to enter a reconciliation comment (i.e. reason).

Figure 46: Indicating the options available using the Quick accept/close icons

Accepting and Closing using the Actions Menu

The actions menu is a drop-down menu which can be seen in the top right corner when the Author/Deputy hovers over or selects a comment or proposed change in the review pane.

Figure 47: Optional reconciliation comment 'Give reason' explaining why comments were accepted, closed, revised or merged.
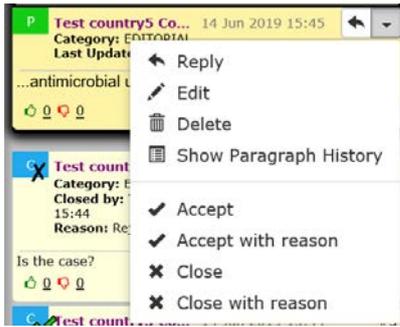
If an Author makes a new comment, proposes a new change or revises as existing change he/she has the additional option of 'Apply+Accept'. This means that the comment or change will automatically be accepted as soon as it is applied.

Figure 48: Apply+Accept option

Figure 49: Document page look after accepting a comment made by a reviewer

21. Retrieving comments

First, login to the system, then select the 'review tab', then 'my reviews'. Select the 'Reviews I'm in' tab. This will display the table of all the documents available for you to review. Locate the document you want to comment on, then select 'Enter' to the far right. Next, you will be taken to the commenting area for that document.

To see all the comments for this document, select the 'view report' icon. This will open a new window where you can view all the comments (general, editorial, substantive, technical, and translation) for this document.

To see a selection of comments, for example only substantial and technical comments, select the 'view report' icon. Next, choose 'select comments', which will open a new window where you can select which type of comments you want to display in your report. Select 'OK' to run the new report.

To save or print a report of the comments, select the 'view report' icon. Next, select 'print', where you will be able to print the file into PDF and save it for your records.

The review closeout screen allows the review Owner to download reviewed documents, complete with aggregated comments and proposed changes, and access a report for other formats.

Figure 50: Download documents with comments

The document/report is retrieved by selecting the 'Download' or 'Display' link. Selecting the 'Download All' option will download a zip file containing all documents available in the system which have the download option.

It is possible to define which comments, etc. appear in the document/report using the 'Select Comments' link, as shown below:

Figure 51: Select comments (to sort comments inserted in the system)

The default position is shown above. So, by default, the downloaded document/displayed report does not contain closed comments, but does include all open and accepted comments from all participants.

22. Workgroup administration

Authors manage the Workgroup in each country. These Workgroup Administrator manage the participants in a Workgroup. Select 'Workgroup management' and this will list the Workgroups of which you have administration permissions. If you are an official IPPC contact point, you will be able to add up to one OCS Deputy and three OCS reviewers.

Figure 51: Workgroup management
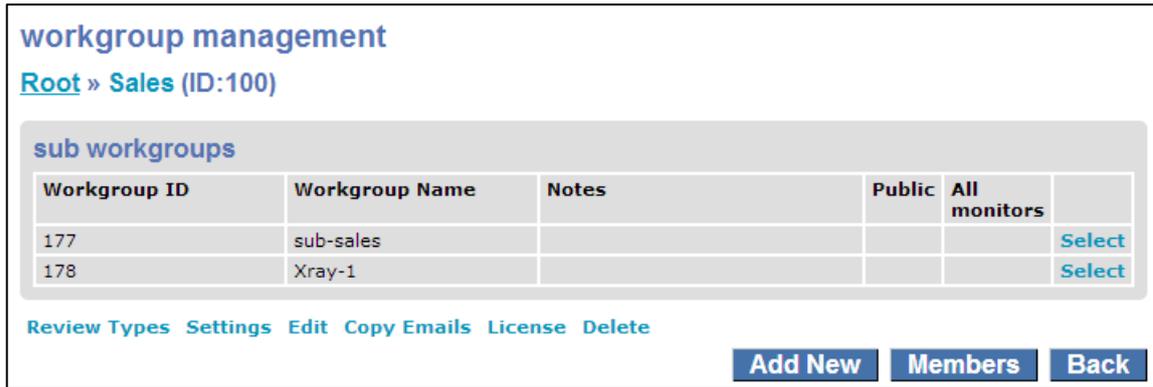
Selecting 'Members' will list all members of the Workgroup and from that list you are able to edit (including Workgroup role) or remove the members.

23. Creating and managing distribution lists

Review Owners (by default those with Author permissions) have the ability to create and manage personal distribution lists. Shared distribution lists are created and managed by Workgroup Administrators.

Select 'manage lists' under 'distributions lists' from the left hand menu when not in a review.

Figure 52: Distribution lists
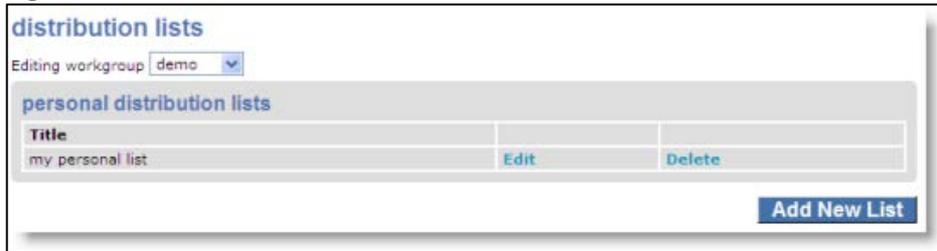
Select 'Add New List' then enter the list title (do not call a list 'Everyone' as the system automatically creates a list with this title). You can search for users individually or select the 'Everyone' list from the drop down:

Figure 53: New personal distribution list

Select the participants to be included on the list, and their default list roles. Then click 'Add'. Once you have all the required participants with their appropriate roles shown in the top half of the screen under 'distribution list members', select 'Save List'.

Once the list is saved it will appear under 'personal distribution lists'. Selecting 'Edit' will permit you to edit the list, while selecting 'Delete' will delete the list.

Note: It is also possible for Authors to create and maintain personal distribution lists from a list of review participants created while setting up a review.